KANTAR

MZANSI

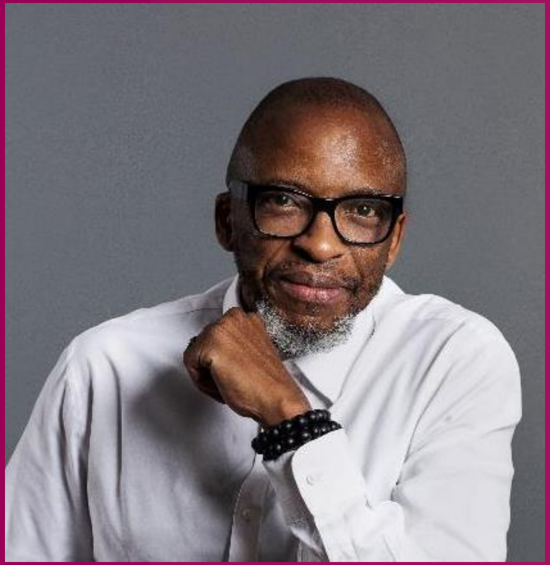
BAROMETER

2024

Snapshot of South African Consumer Behaviour

Watch the webinar on demand

MEET THE SPEAKERS



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THE MOOD OF THE NATION

KANTAR MZANSI BAROMETER

VOTING MAIN

86%

say they are registered to vote

83% lower income and 90% upper income

96%

of South Africans plan to vote

With the sentiment equally split between the lower- and upper-income groups

VOTING TOWNSHIP

79%

of township consumers

claim to be registered to vote

93%

of township consumers plan to vote

18–24-year-olds have the lowest intention to vote

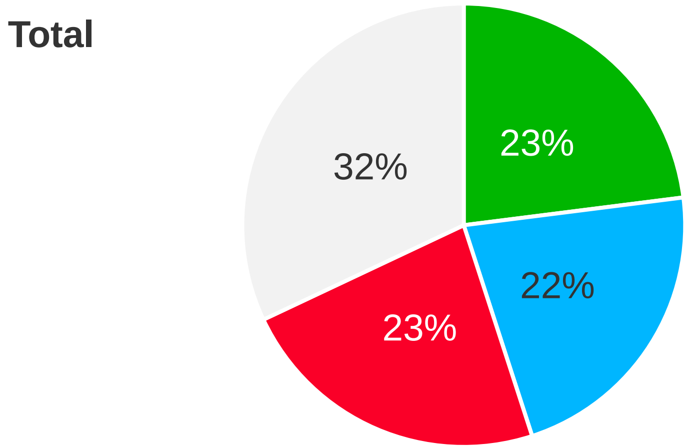
Online SA seems split between parties

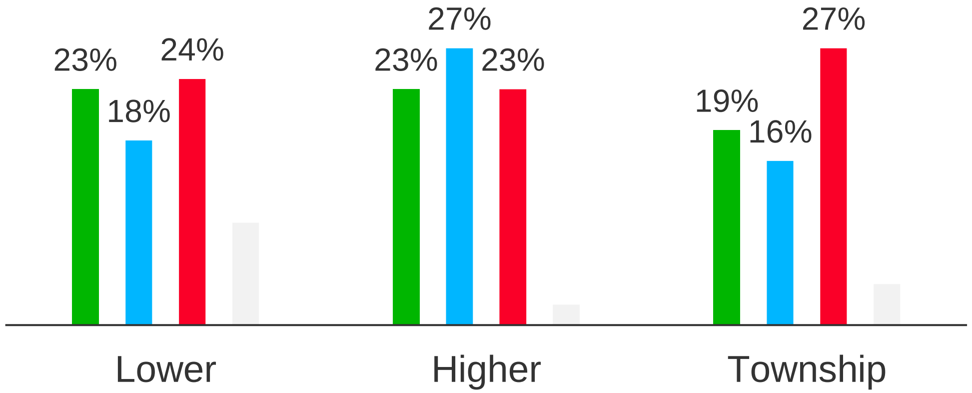
A preference for the EFF in townships, while higher income are drawn to the DA

Ages 18–24 across income groups favour the EFF while older South Africans over 45 favour the DA.

Possible political association

ANC | DA | EFF | Other





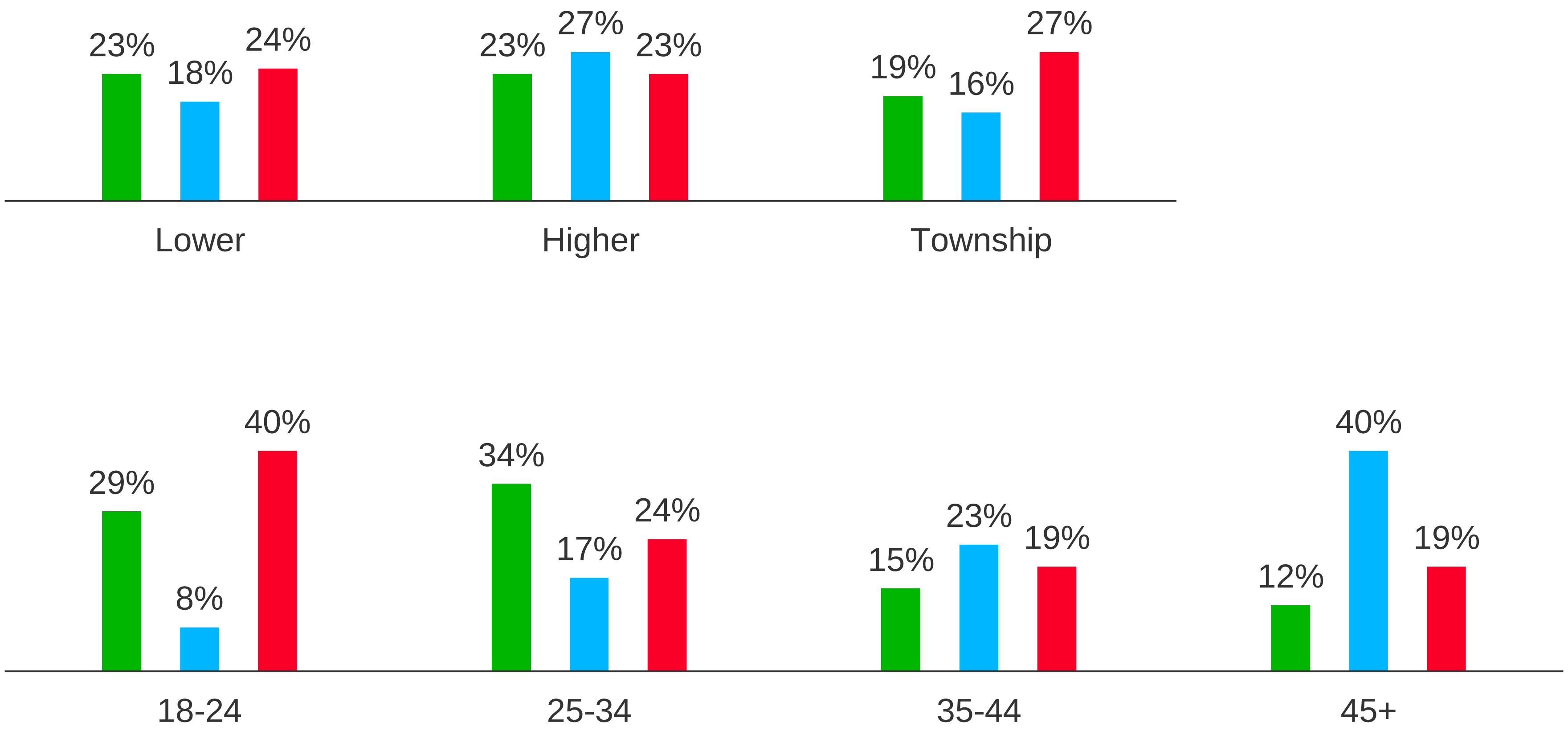
Base n=415 Total connected South Africans, n=85 connected townships based South Africans, Are Regardless of whether you will be voting or not, do you think of yourself as a little closer to any one of these political parties than to the others?

Online SA seems split between parties

A preference for the EFF in townships while higher income are drawn to the DA

Possible political association

ANC | DA | EFF



THE STATE OF OUR NATION

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Top five biggest concerns remain

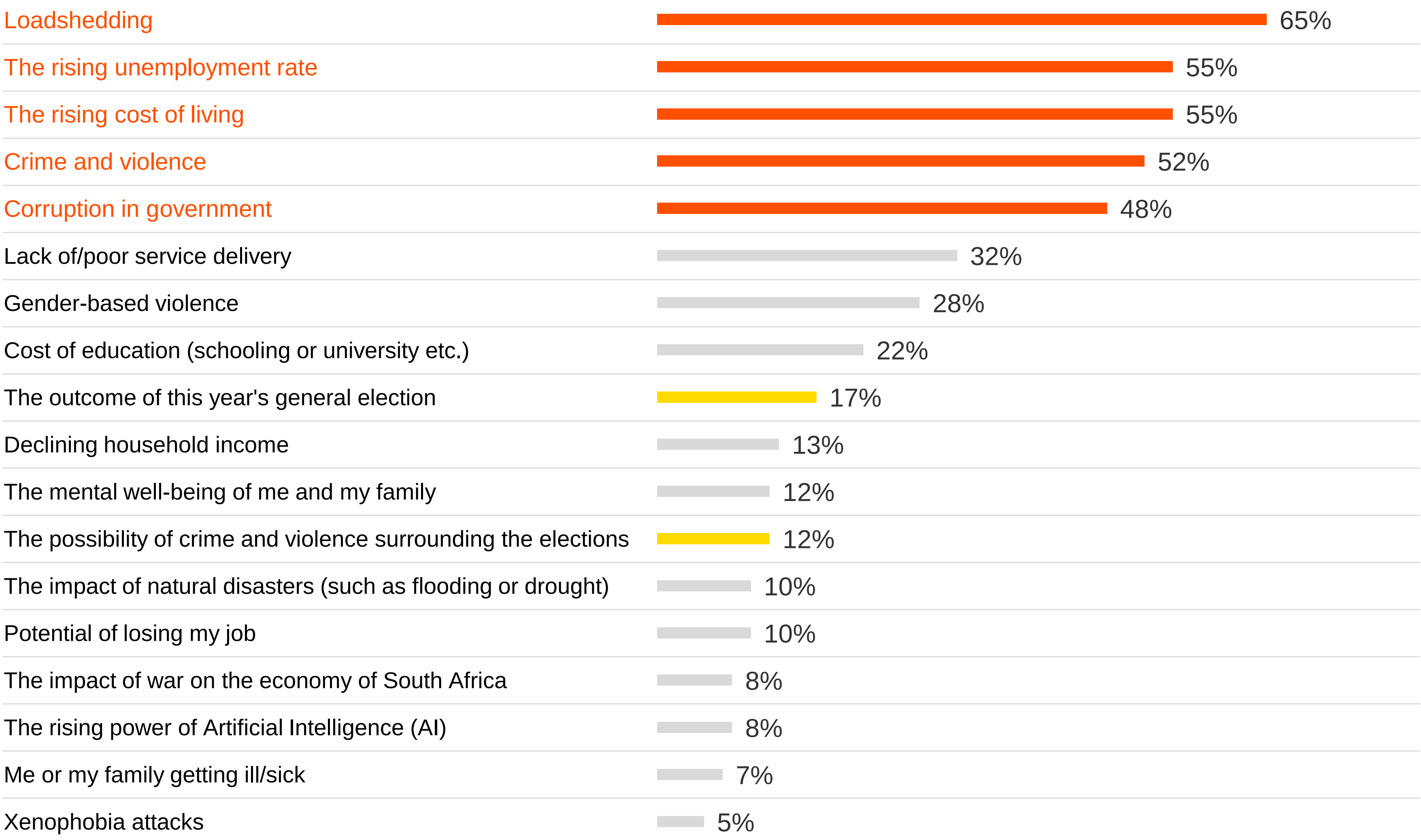
Unemployment rises to second position from fifth

Poor service delivery and gender-based violence also increasing

Election fears driven primarily by older South Africans

Followed by rise in unemployment, cost of living, crime and corruption

What South Africans are most concerned about in 2024



Base n=500; n=415 Total connected South Africans, n=85 connected townships based South Africans.
Q034: Thinking about South Africa at the moment, what sort of things are you most concerned about?

So let’s take a look at the top five concerns

Loadshedding

The South African Reserve Bank estimated that loadshedding has cut the country’s economic growth for 2023 by 2%, so that achieved growth was a mere 0.6%

Forecast to remain at just 1% for 2024 largely due to loadshedding

Unemployment

Q4 2021: 35.3%
Q4 2022: 32.7%
Q4 2023: 32.1%

Crime and violence

Contact crime is up 7.7% from 2022 to 2023

Corruption

Anti-corruption movement **Transparency International** (TI) released the 2023 **Corruption Perceptions Index (CPI)**

SA at its lowest ever level at 41 points out of a possible 100

Cost of living

Q4 2021: 5.9%
Q4 2022: 7.2%
Q4 2023: 5.1%
Apr 2024: 5.3%

CNBC Africa

80% of income spent within 5 days

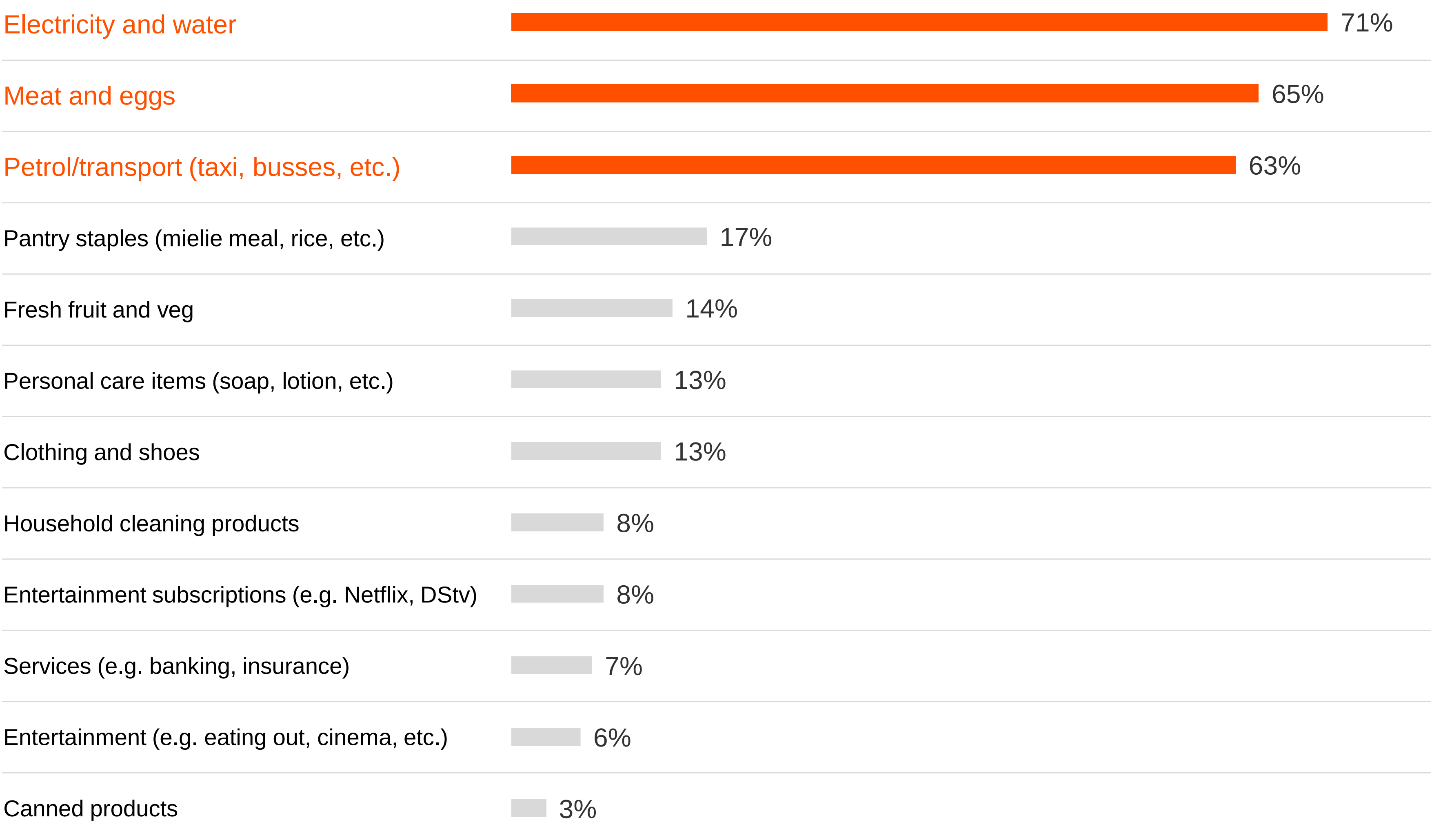
73% Servicing debt

23% For living: transport, food, data etc

Honing in on cost of living

The greatest increases are experienced across electricity, meat and transport

Cost of living categories



Base n=500; n=415 Total connected South Africans, n=85 connected townships based South Africans, FS15 We hear about the rise in prices and how it impacts the cost of things, which 3 things have you personally experienced the highest increase in cost, if anything?

SOUTH AFRICANS ARE BUILT DIFFERENTLY

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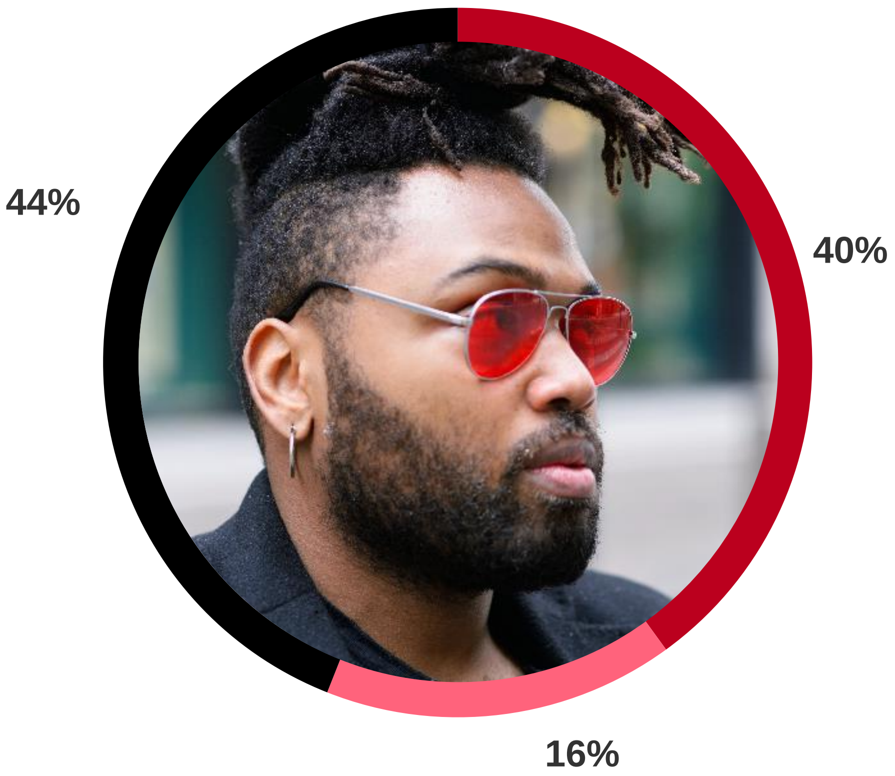
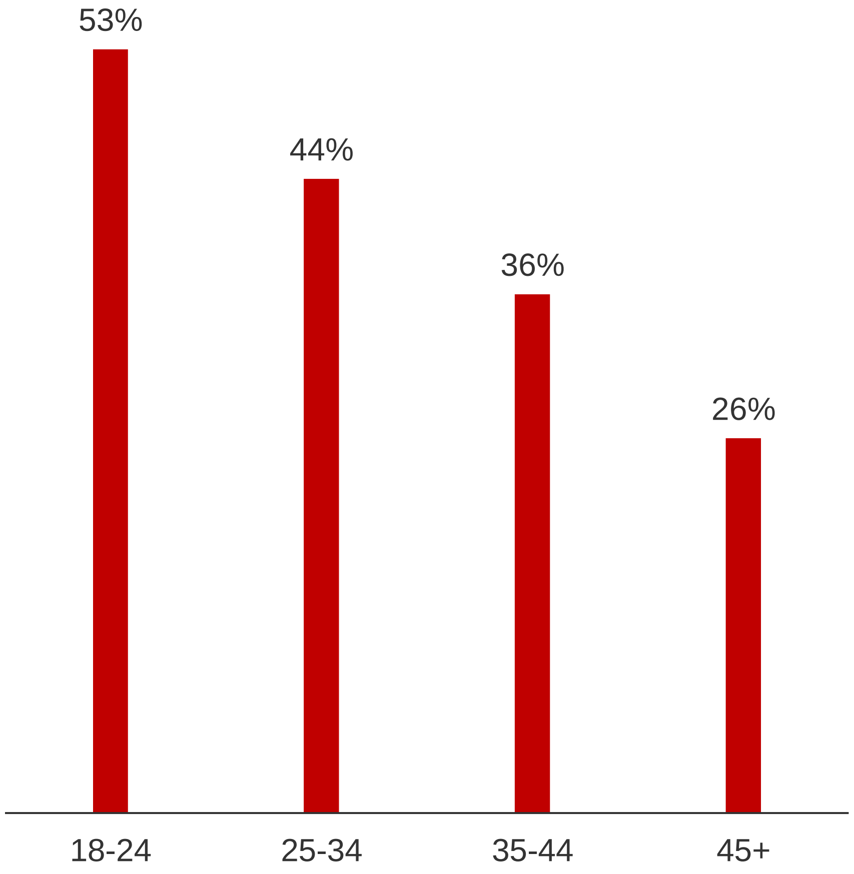
Things could look bleak yet we are optimistic about our future, driven by the youth

Highest pessimism remains amongst those who live in townships and older South Africans

Country outlook over next five years

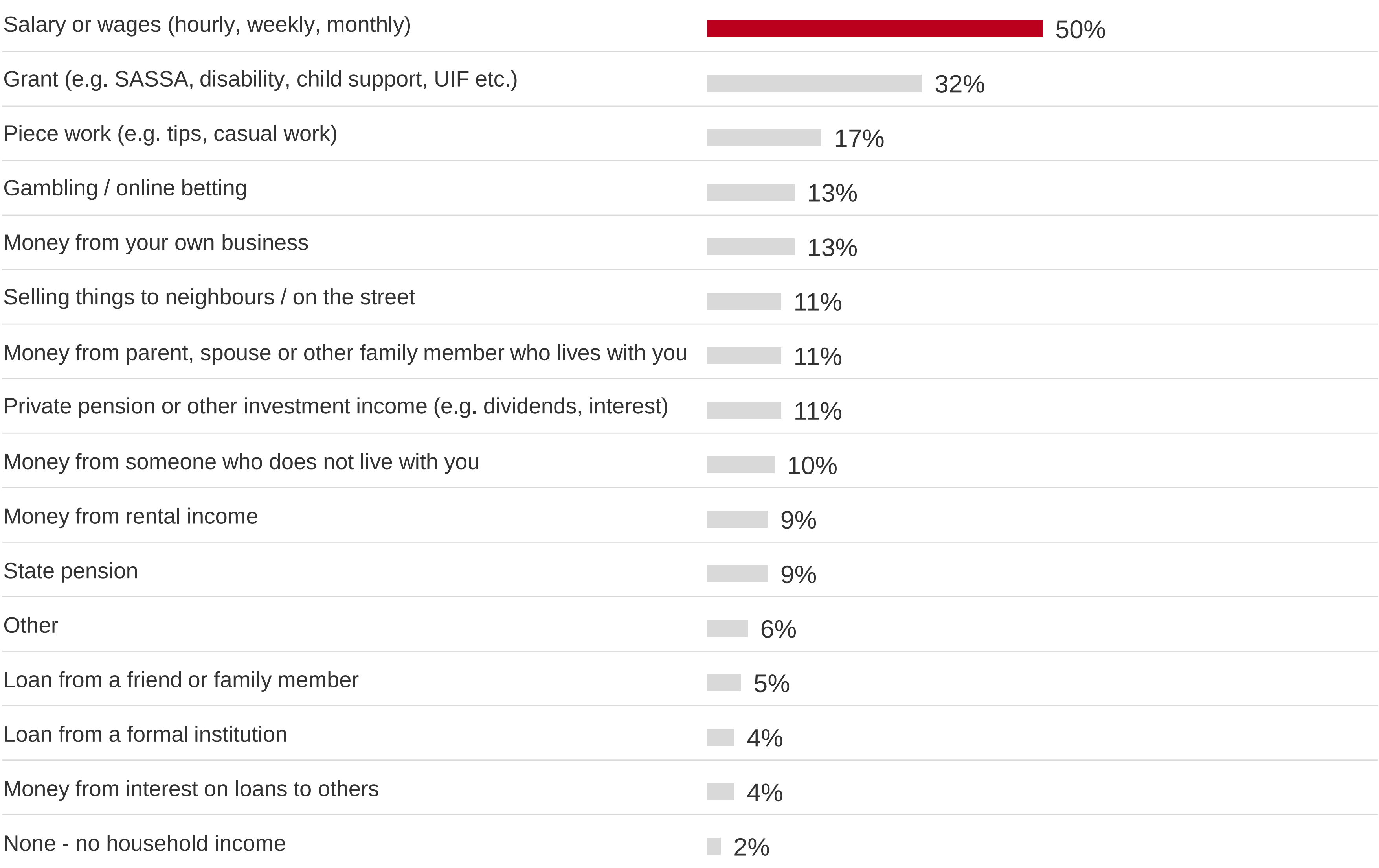
Things will get better | Things will stay the same | Things will get much worse | Don’t know





Base n=500; n=415 Total connected South Africans, n=85 connected townships based South Africans
FFC: And what is your general feeling about the future of our country over the next five years?

The sources of household income are predominantly salaries, grants and piece work



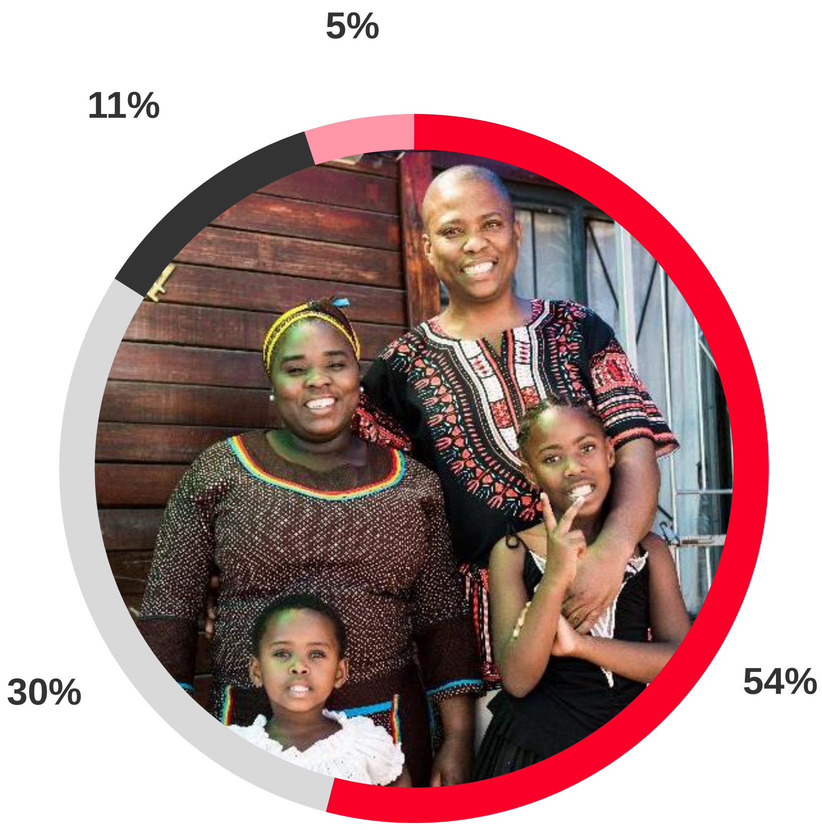
Base n=389 Total connected South Africans, n=107 connected townships based South Africans, 31 March-14 April 2023
FS13 Which of the below sources of income contribute to your personal monthly income? Select all that apply.

And more than half are optimistic about a favourable future financial household position

Particularly higher income and younger South Africans (18–34-year-olds)

Future household financial position

Better off financially | About the same | Worse off financially | Don't know



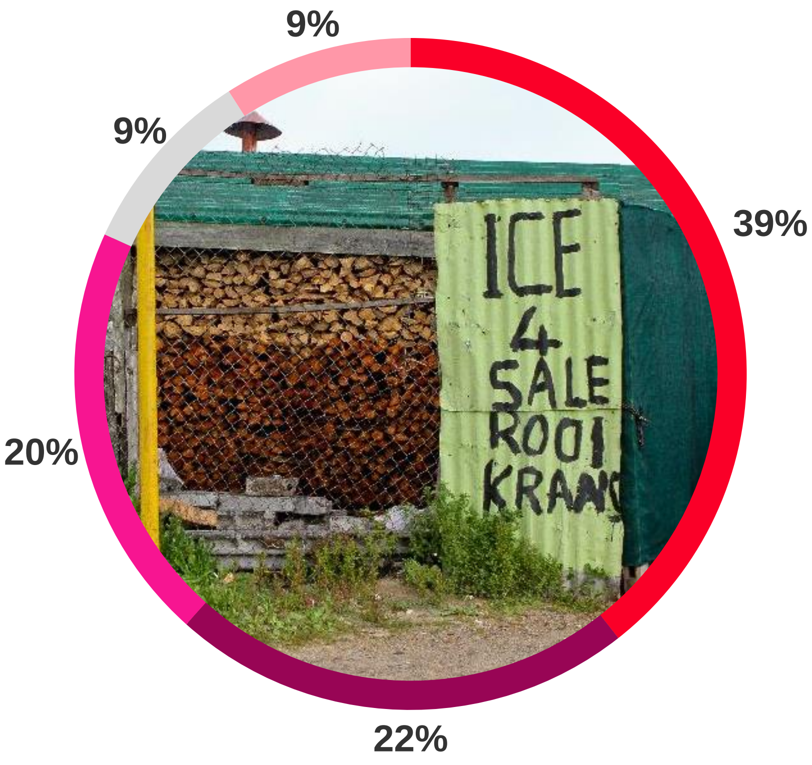
— *Previous year

And we are hustling to make this a reality

Highest consideration is in townships, highest conversion to business is amongst higher, equal focus across age groups

Supplementing income

No, but considering | Yes, started a business | Yes, business is primary income | No, done nothing | Yes, second job



*Previous year

THE PLATE OF OUR NATION

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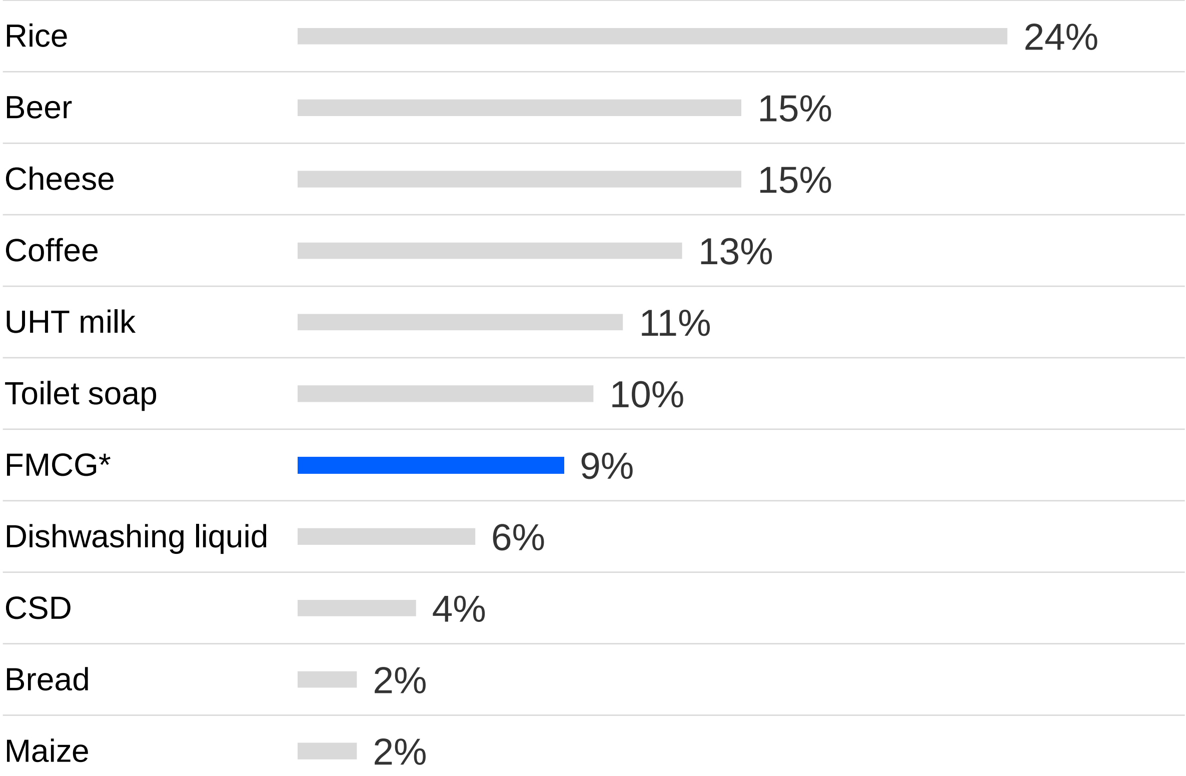
Kantar's shopper panel shows FMCG inflation at 9%

Ave price paid per volume 3 ME Jan 24 vs 3 ME Jan 23

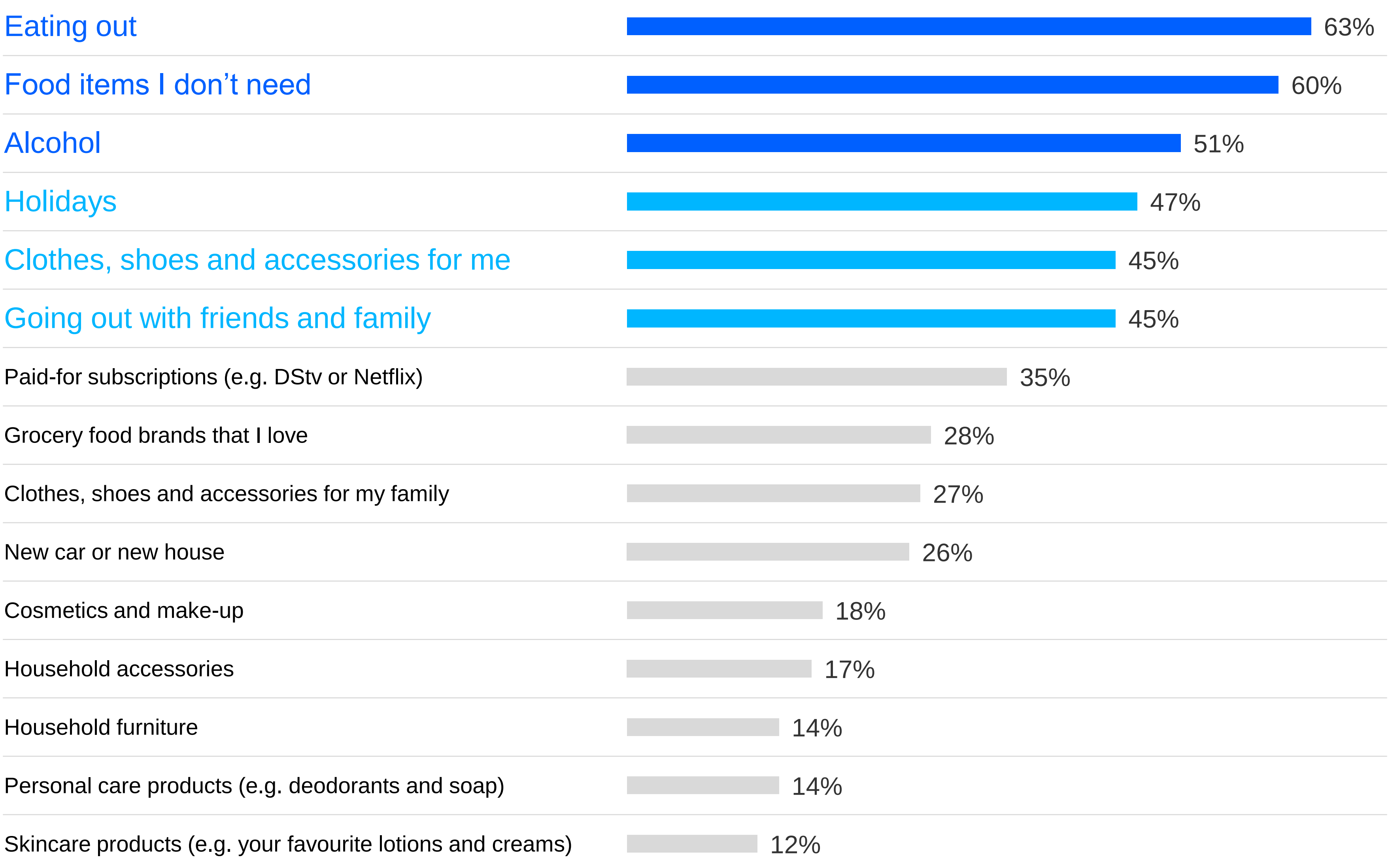
Kantar Worldpanel



Source: Kantar Worldpanel, 3 ME Jan 24 vs 3 ME Jan 23

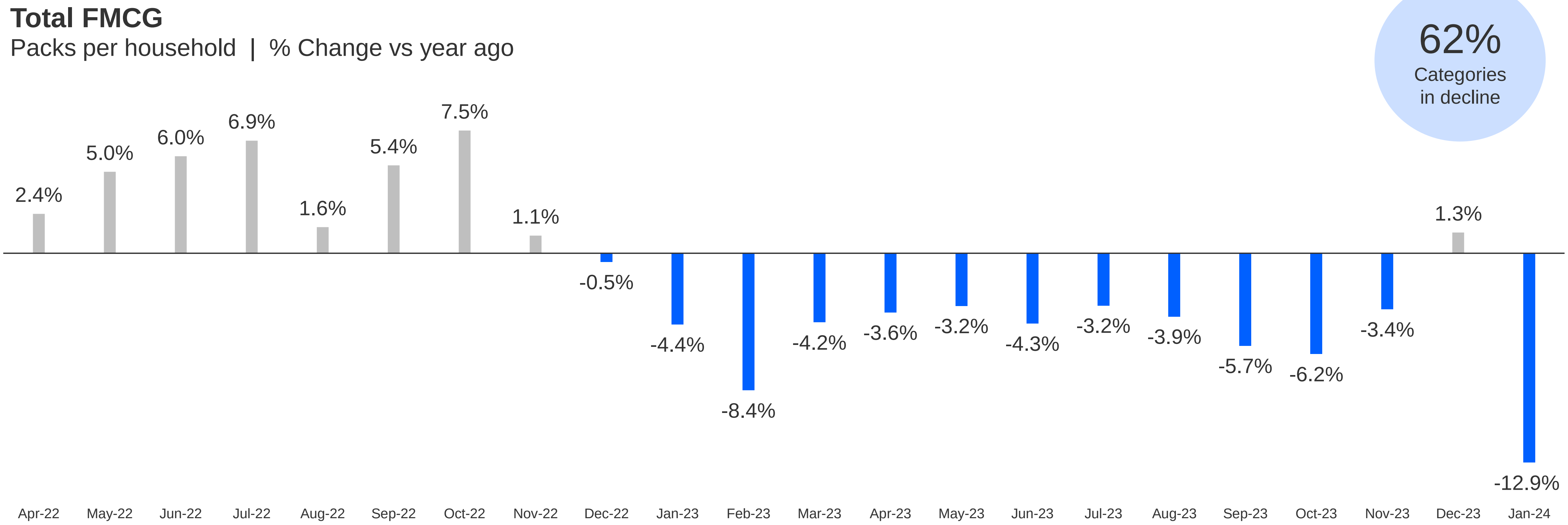
To manage, we are increasingly reducing luxuries and being super savvy in where and how we shop

The luxuries we are reducing include eating out, unnecessary food items and alcohol



Base n=415 Total connected South Africans, n=85 connected townships based South Africans, FS16 And what are some of the things that you are cutting back spending on?

In fact, reducing luxuries has meant that we are literally eating and using less



62%
Categories in decline

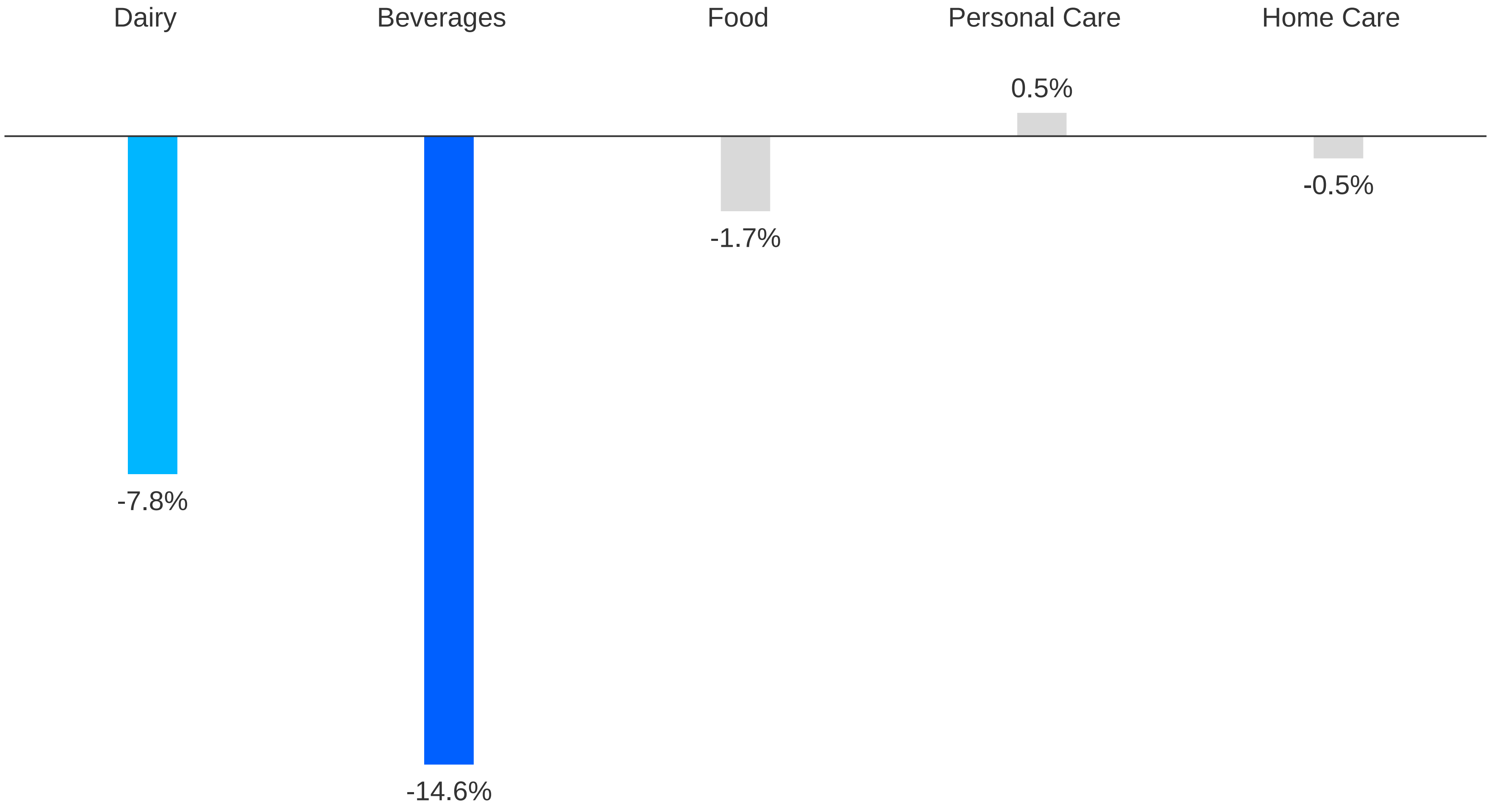
Source: Kantar Worldpanel
FMCG Definition: 117 food (excluding fresh), dairy, beverage, personal and home care categories

Particularly in beverages and dairy

While we are still spending the same amount per trip, we are buying fewer things

Total FMCG – Packs (volume)

Packs per household | % Change vs year ago | 12 ME Jan 24 vs ago



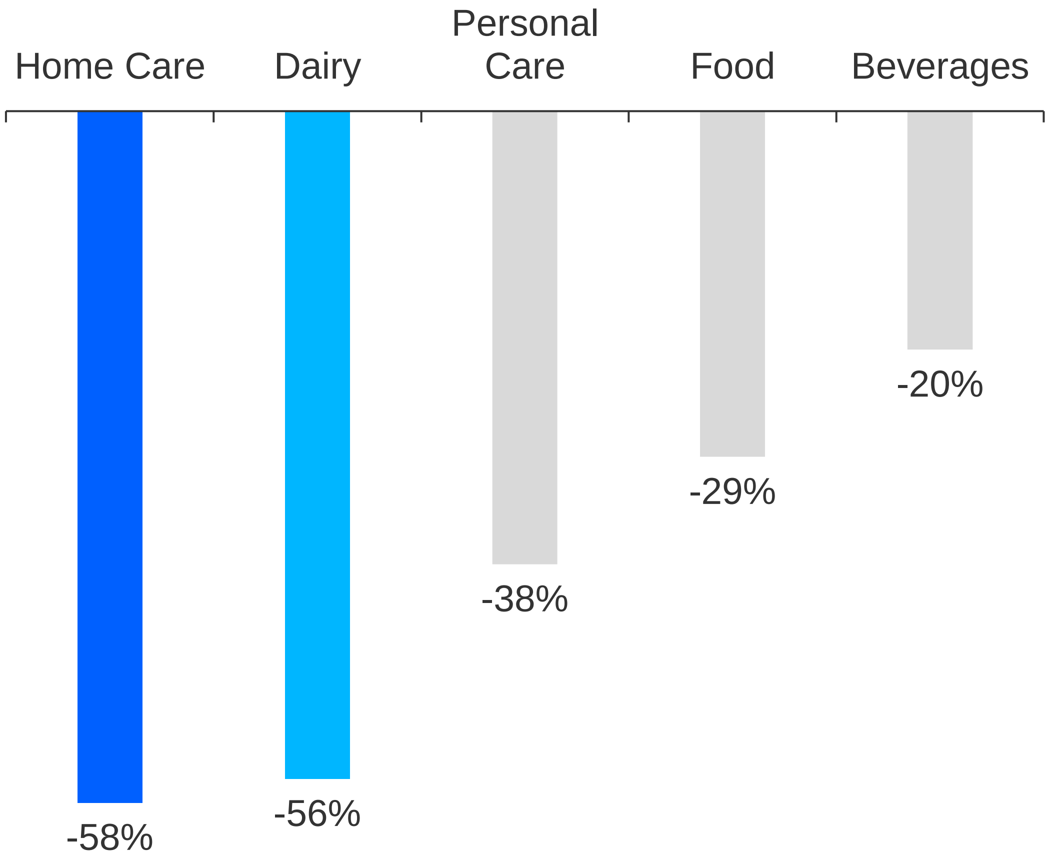
And redefining new categories altogether

by re-evaluating and consolidating how we use categories to meet our needs

Read: 58% of home care categories are experiencing a decline in penetration

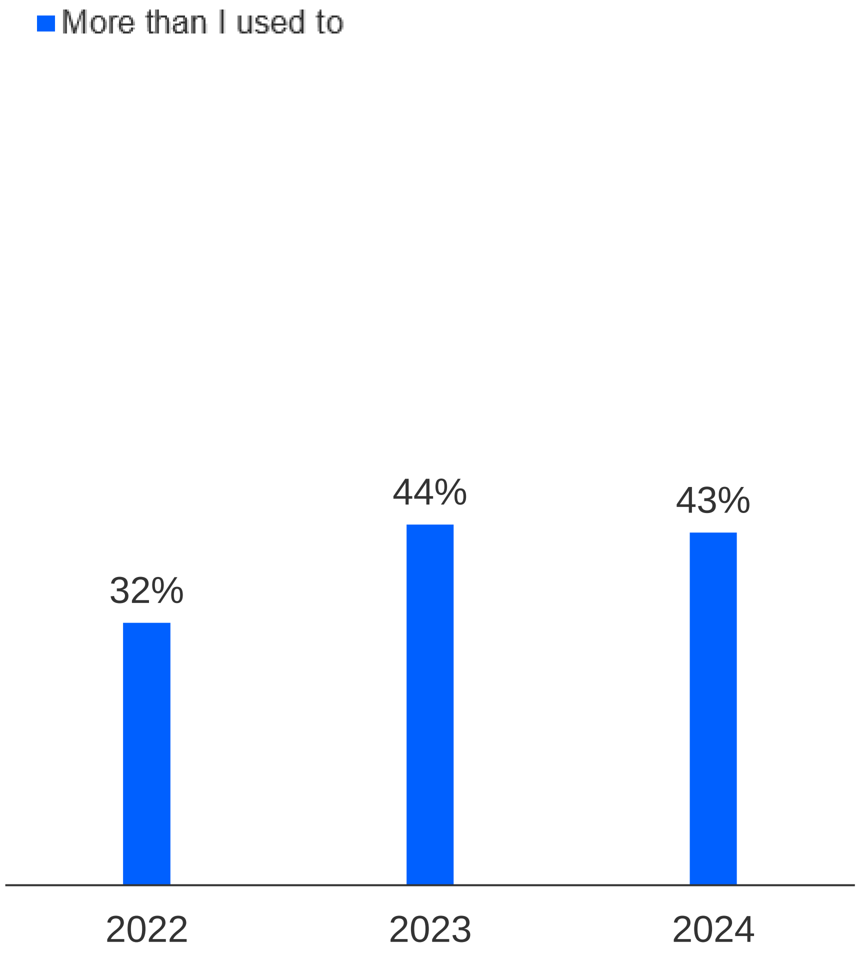
Total FMCG - penetration

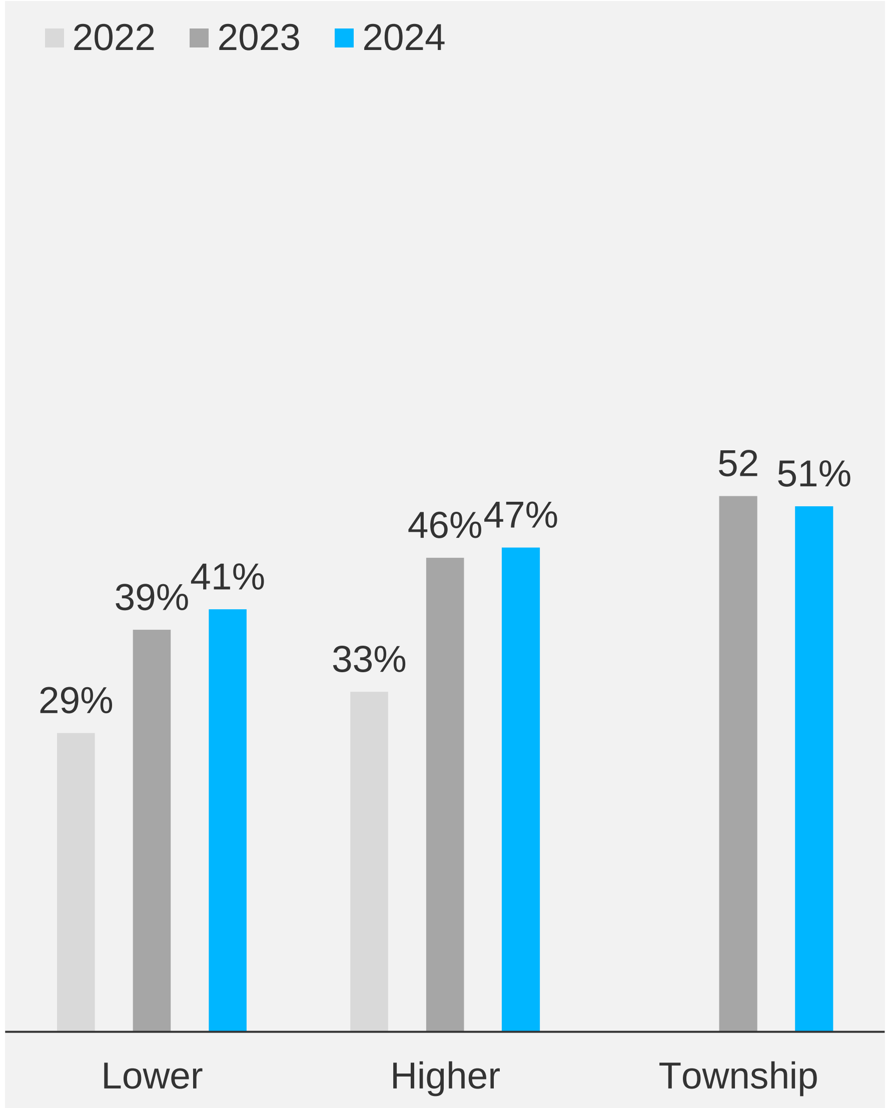
Penetration | Change vs year ago
12 ME Jan 24 vs ago



We are also trying out cheaper brands more than we used to

Try out new brands that are cheaper than your usual brands



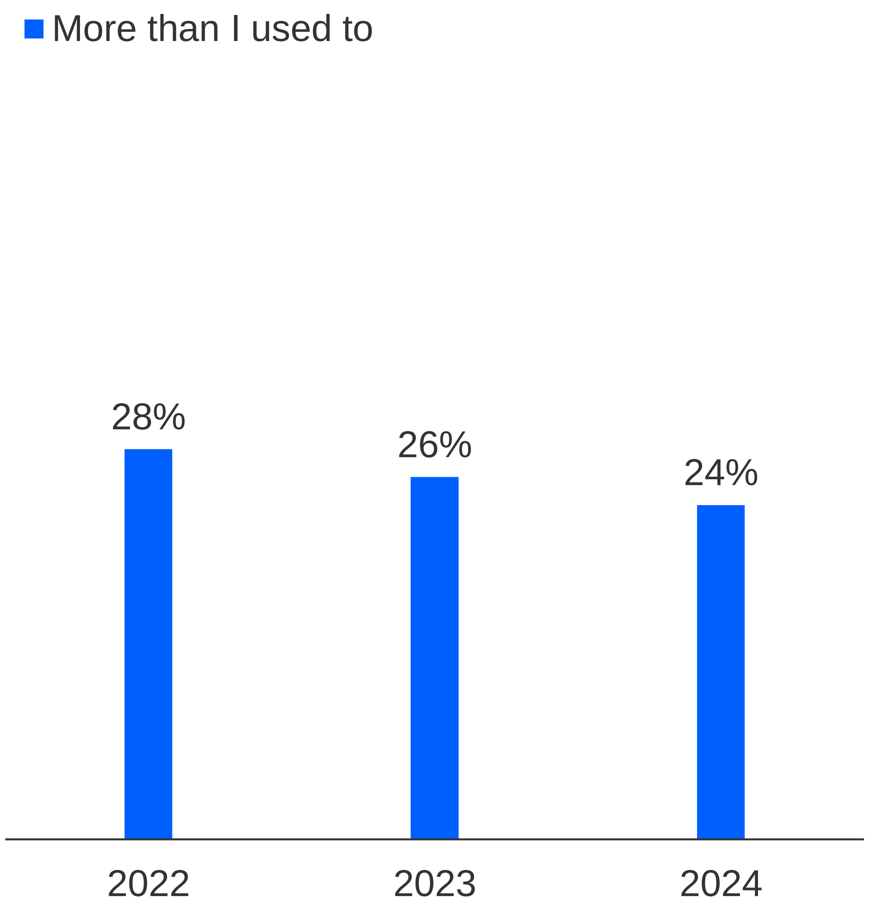


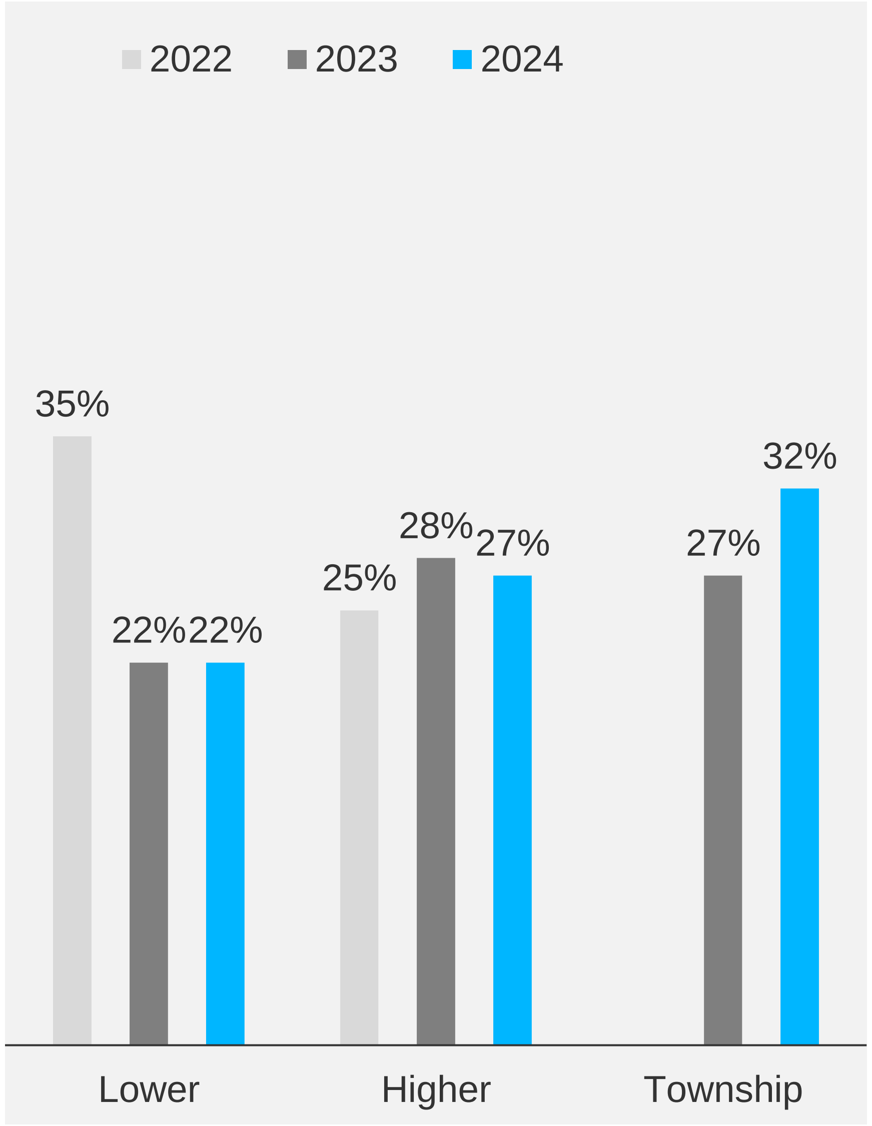
In order to create budget to access the brands we want

even when they are more expensive

Township consumers reluctant to downgrade

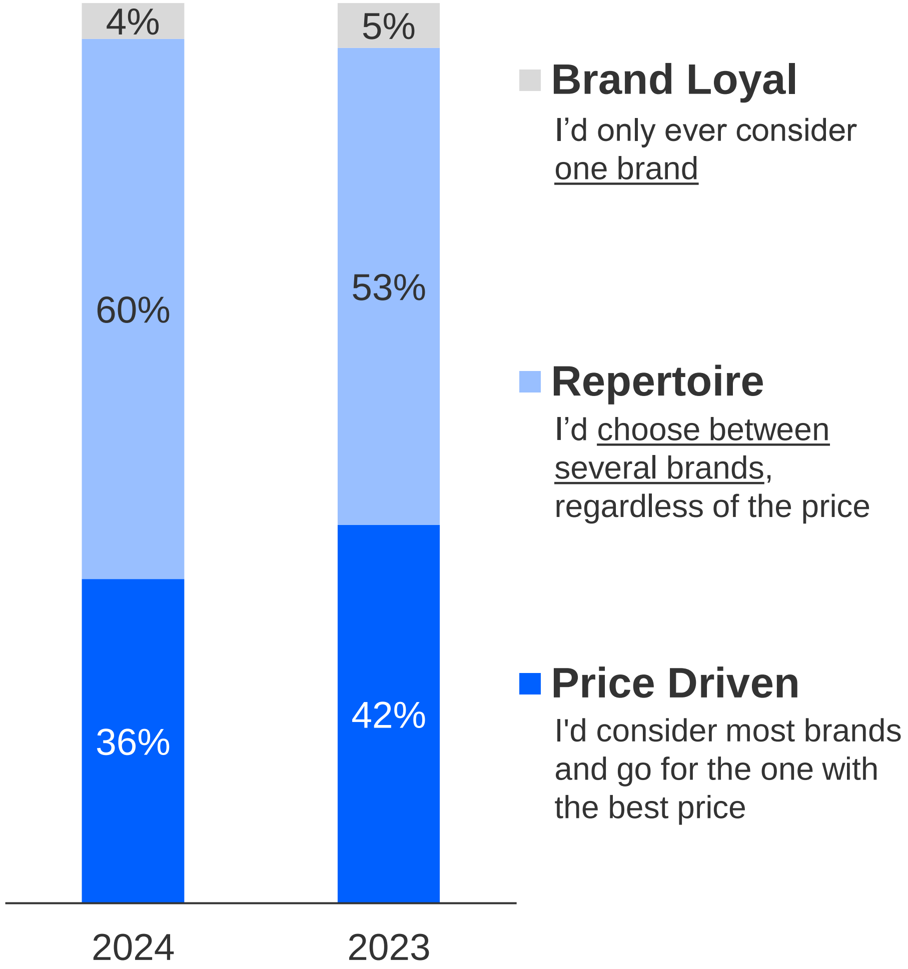
Stick with the brands that you trust even if they are a little more expensive than others





So South Africans are not deserting brands, we are increasing our repertoires based on circumstances

Consumer typology %
SA Market: Kantar BrandZ*

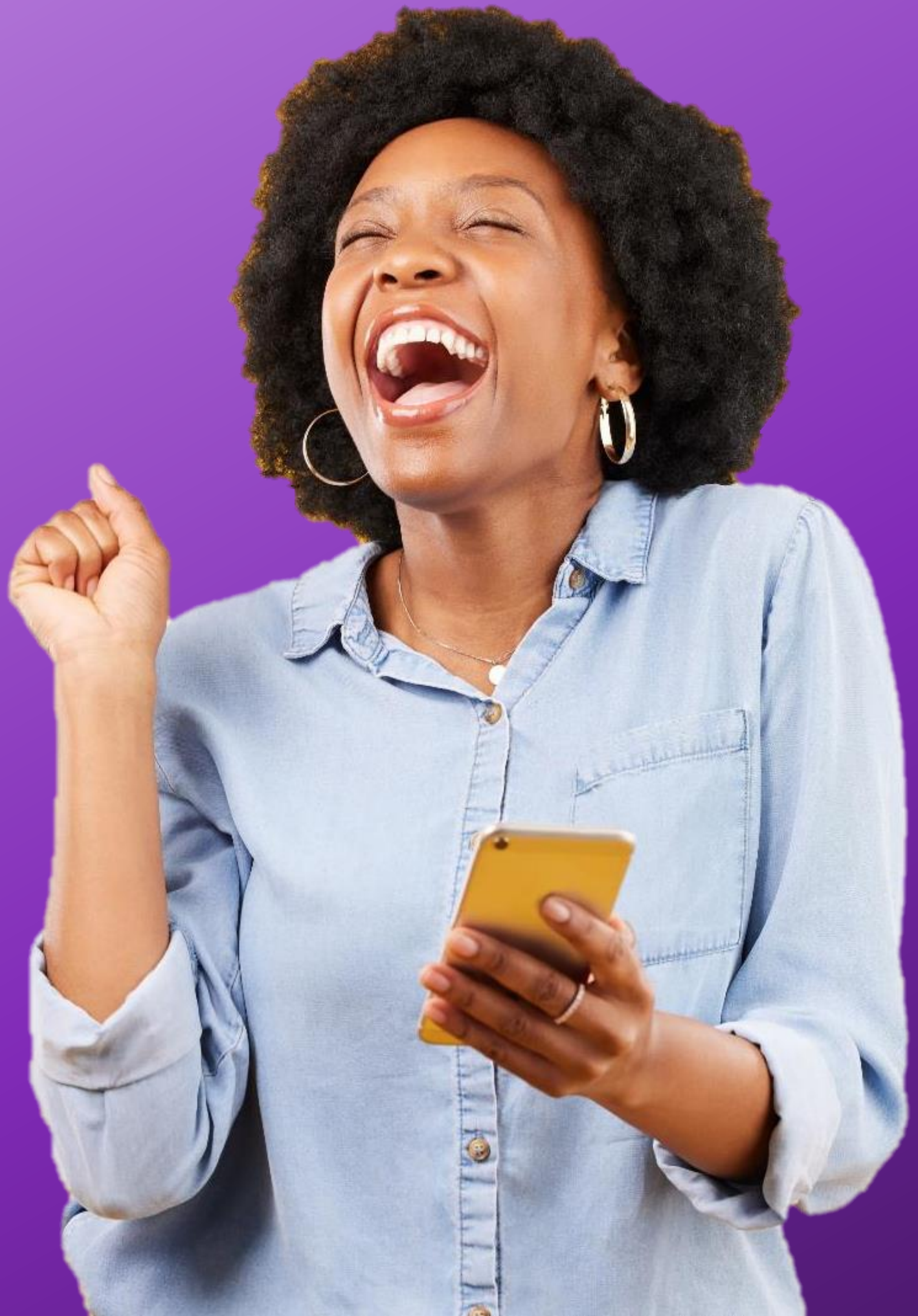


GOOD
ENOUGH
IS
GOOD **ENOUGH**

*Meta analysis of Kantar BrandZ's SA database for categories where location doesn't influence purchase decision
https://www.nikosmarinos.com/good-enough-is-good-enough.html

We’re becoming a nation of smart **value-hackers**

We’re placing higher demands on the brands in our ecosystems, seeking out value wherever we can!



So, what is value-hacking?

It's about designing a life that is…

Friction-free

More automated decision-making

Brands work together to alleviate mental load in my world

My needs are predicted and catered to before I think about them!

and

Value-filled

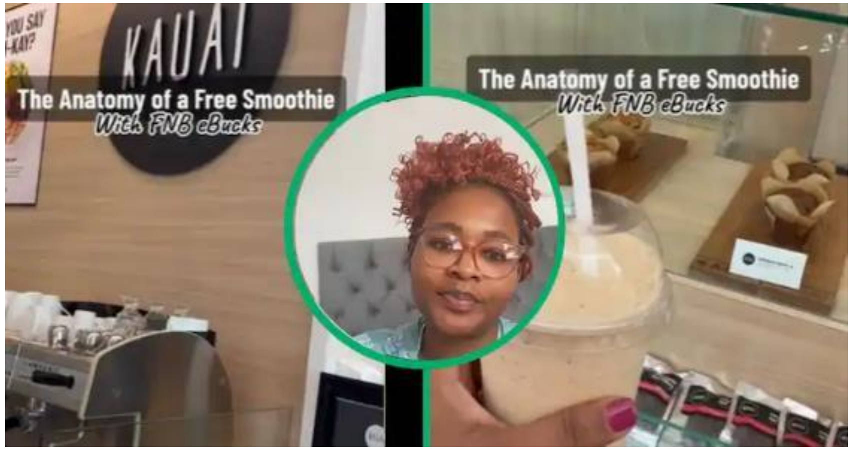
Brands and businesses partner to deliver more utility in my life

I'm no longer forced to compromise because of time and money constraints!

It’s about making more, from “less”

Foodies of SA continue to inspire accessible, everyday gourmet!

@vuvuvena_reads shows South Africans how to hack value from rewards programmes



@cheapskate_sa shares adorable finds so anyone can have beauty in their lives!

People want to partner with brands that add **meaningful value** to their ecosystems

99% of connected South Africans have a store rewards card

The biggest loyalty programmes operate using buying currency as the key mechanism

65% of South Africans want some version of “cash” back

23% want to be able to buy “things I need”

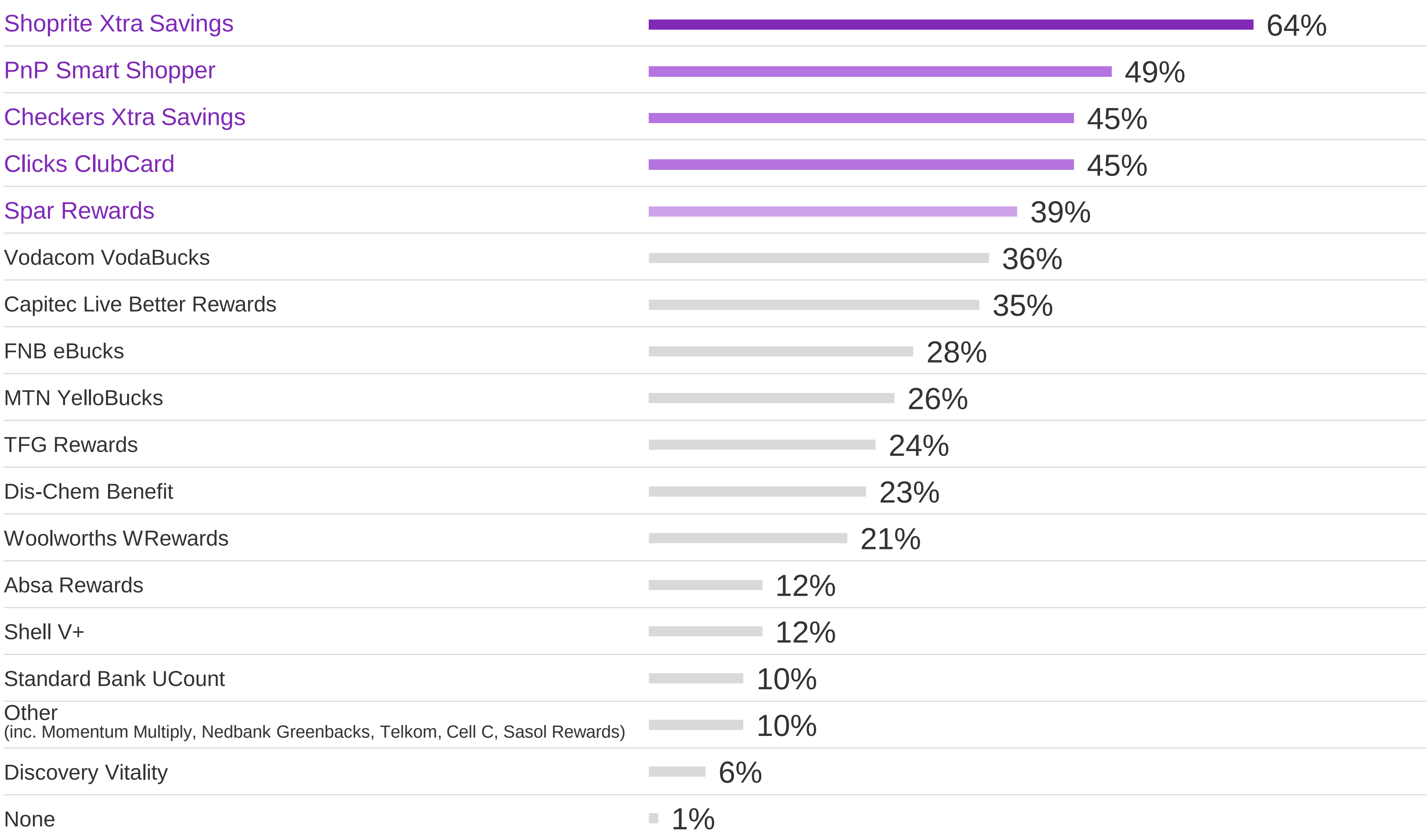
10% want to use it for entertainment

Rewards programmes

are becoming central to the value-hacker's ecosystem

Checkers Xtra, FNB eBucks and WRewards used by higher income

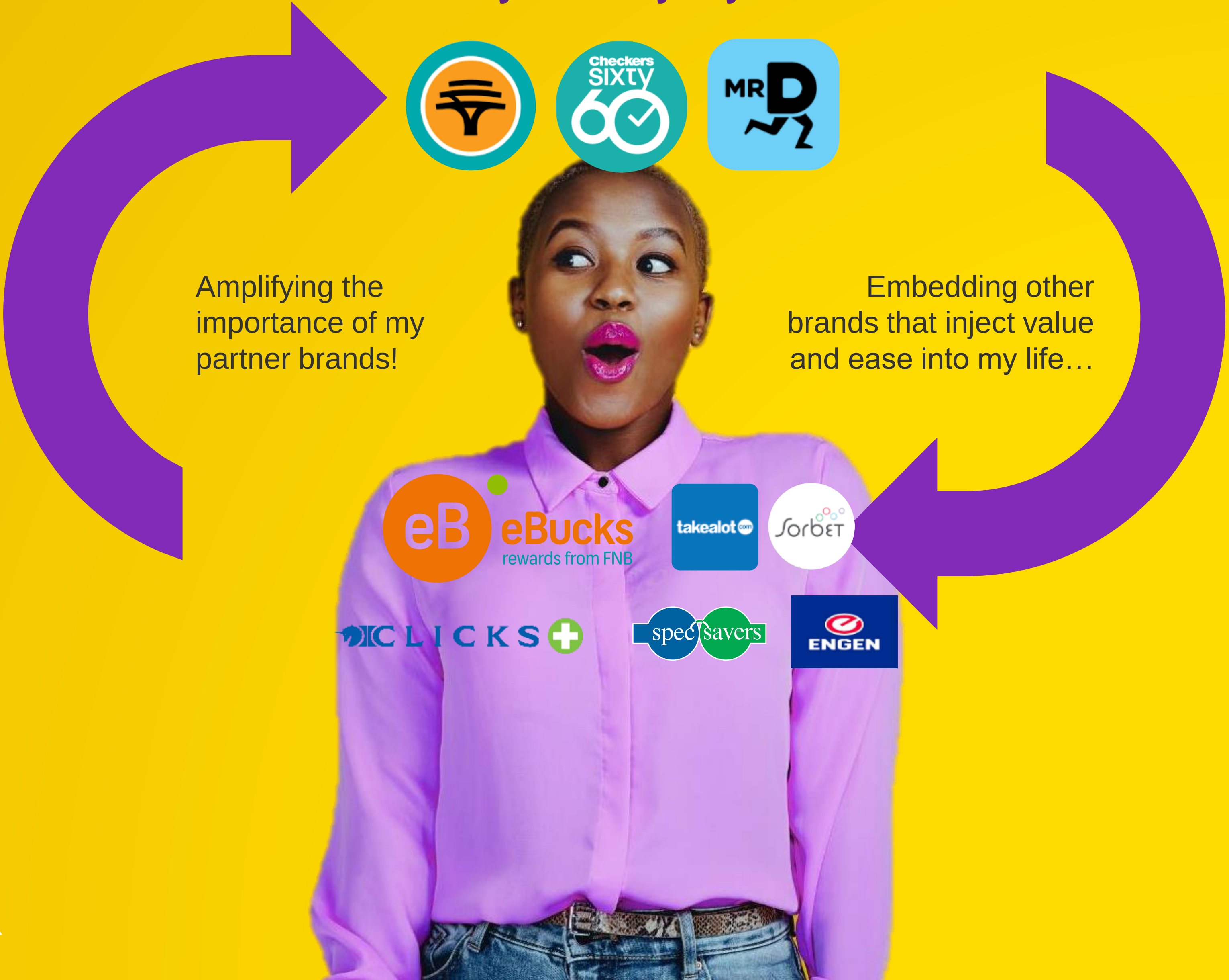
Loyalty programmes used



And beyond rewards, there is power in partnering with existing platforms to consolidate and create value in consumers' lives….

Lebo’s ecosystem of brands!

My partners that facilitate my life every day…



And this lifestyle isn’t only available to the wealthy!

Tomorrow, it will be about an ecosystem of brands that

ADD MEANINGFUL VALUE, SEAMLESSLY!

This calls for TWO big shifts in brand thinking

FROM:	TO:
Focus on my category	Focus on lifestyles and ecosystems
Ownership of the entire customer experience	Courageous collaboration

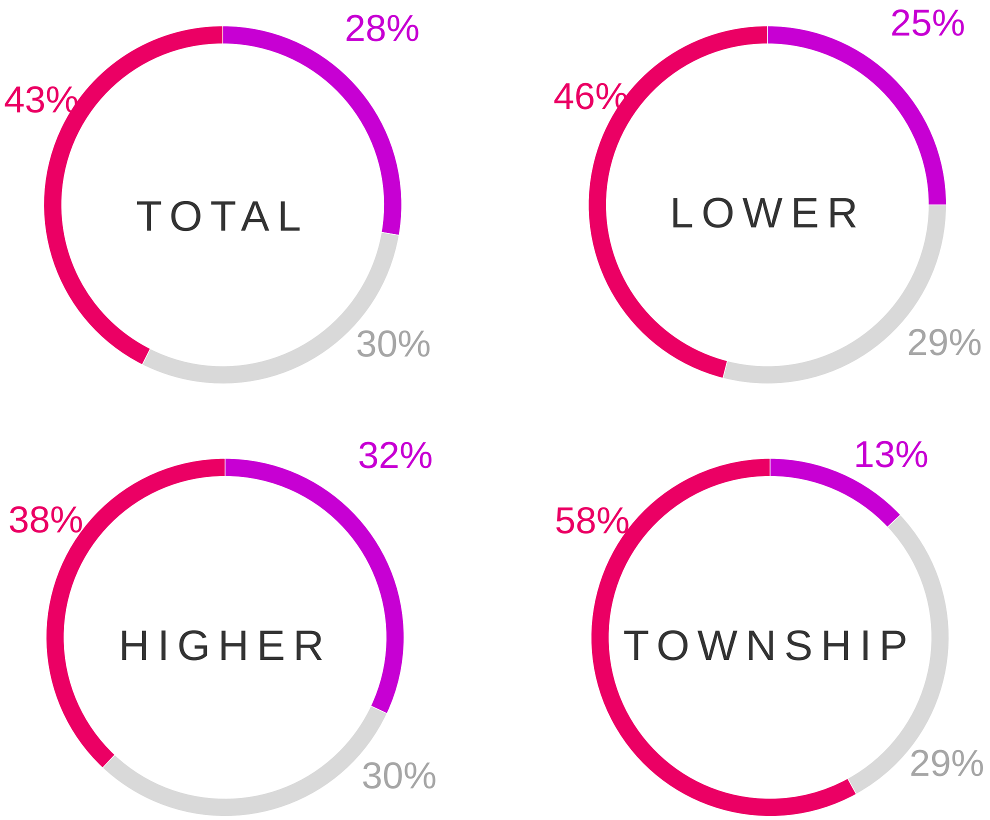
HOW OUR NATION SHOPS

South Africans still predominantly prefer to shop in-store

Particularly those in townships

Online vs in-store shopping

More online | About the same online and in-store | More in-store



↑ More this year than last

Base n=500; n=415 Total connected South Africans, n=85 connected townships based South Africans,
PB6 On average how much of your total monthly purchases are done online vs in-store? Would you say you generally shop…?

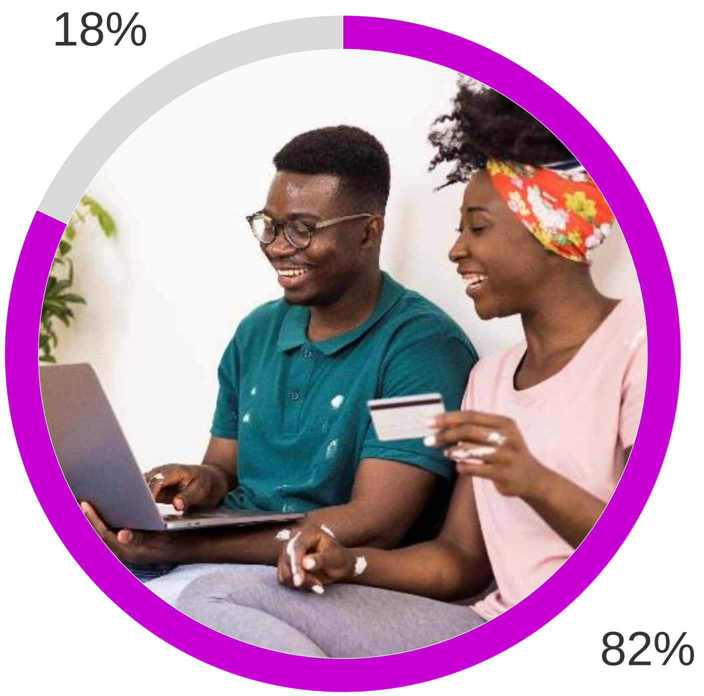
Most of the connected population do also shop online

The overall percentage of people who shop online remains around 80%

The big increase is amongst the lower income

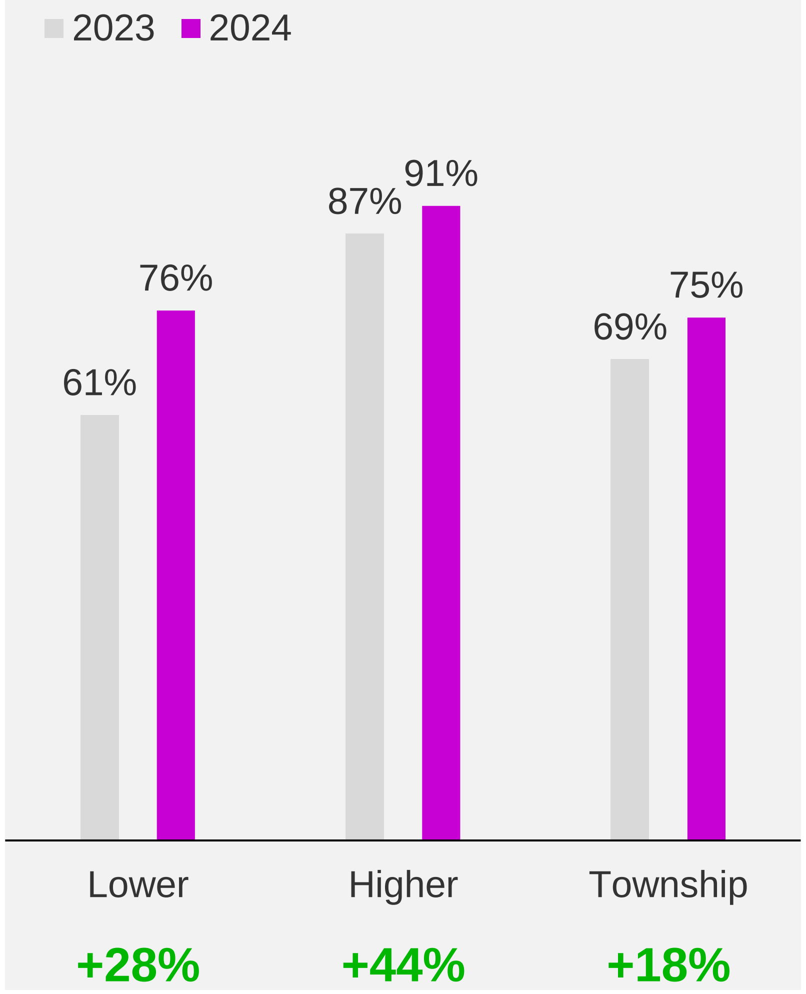
Online shopping

Shop online | Don’t shop online



More this year than last

Shop online

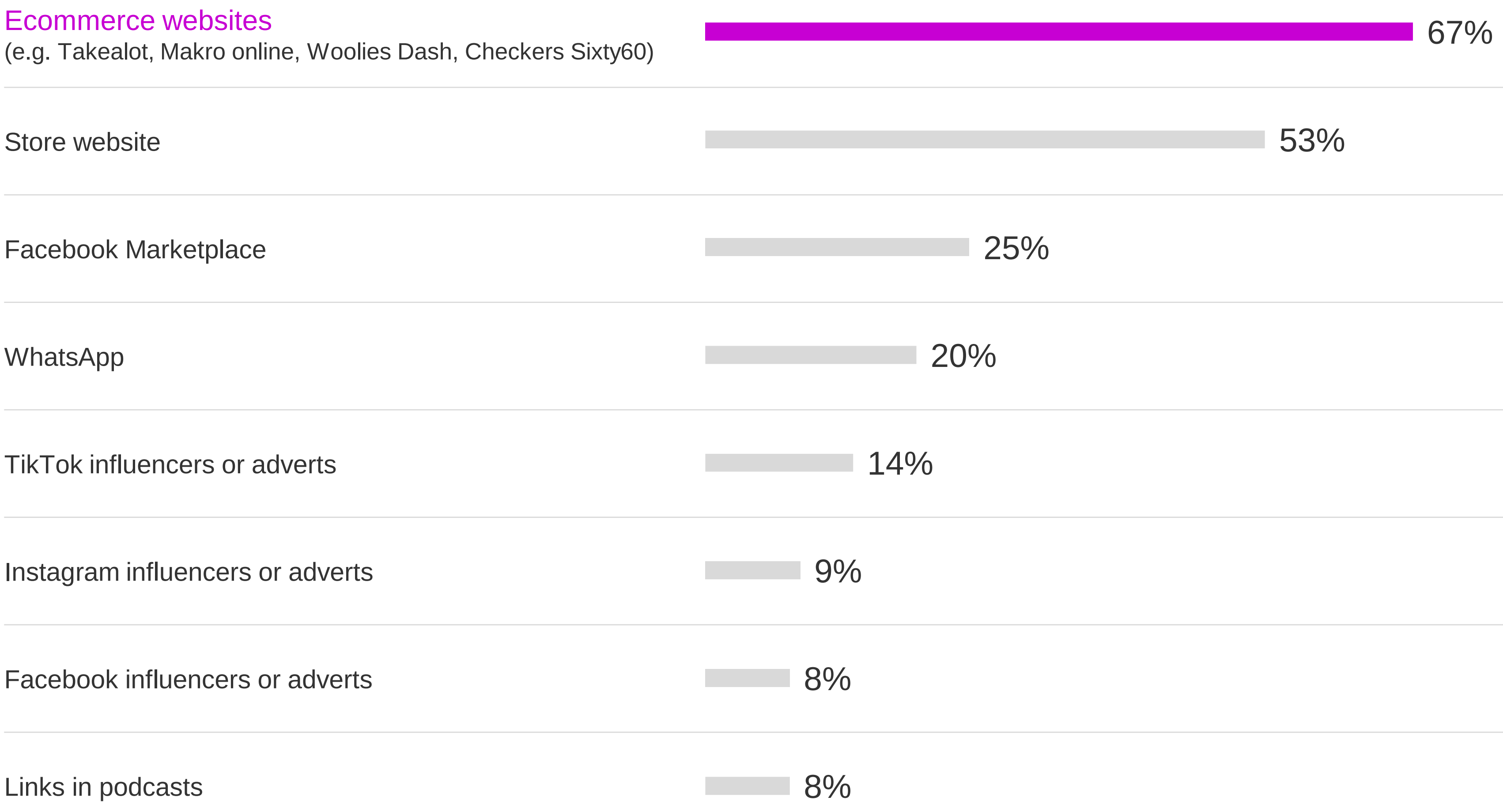


And are well versed in the use of ecomm websites

High usage of store websites likely relates to comparison of prices online

Online platforms

Shop online | Don't shop online



And this move to online is being spearheaded by both consumers and delivery platforms

14% of South Africans have a credit card, 7% in lower income homes

Collection depots

Drivers

Personal shoppers

Township franchise development


BRANDS TOGETHER FOR A SUSTAINABLE NATION
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Sustainability issues (both social and environmental) are important to South Africans

54% pay a lot of attention to environmental and societal issues in the news

68% are prepared to invest time and money in companies that try to do good

62% believe buying sustainable products is a demonstration of who they are

Sustainability issues (both social and environmental) are important to South Africans

54% pay a lot of attention to environmental and societal issues in the news

68% are prepared to invest time and money in companies that try to do good

62% believe buying sustainable products is a demonstration of who they are

Source: Kantar Sustainability Sector Index Middle East and Africa 2023
Q31. To what extent do you agree with the following statements? (Top 2 Box Strongly agree/agree)
Total n =800

Because South Africa is excessively affected

by the combined impact of global and local economic, social and environmental crises

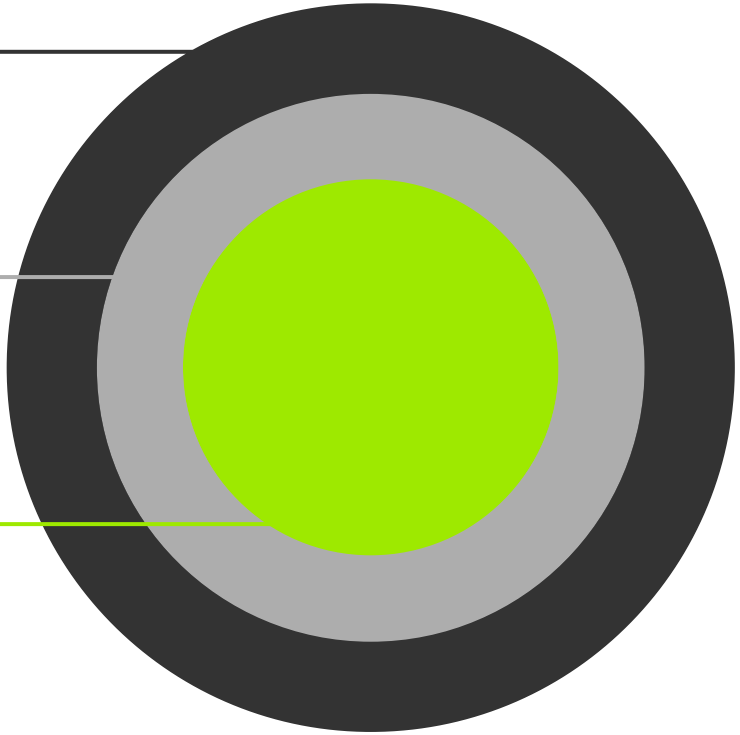
People’s worries are rooted in what impacts their daily lives

and where they are on Maslow’s hierarchy of needs

THE WORLD
The planet, the wider world, its issues and communities

OUR WORLD
Extended family, friends and communities I belong to

MY WORLD
Me and my immediate family



SELF-ACTUALISATION
morality, creativity, solutions

ESTEEM
confidence, achievement, respect

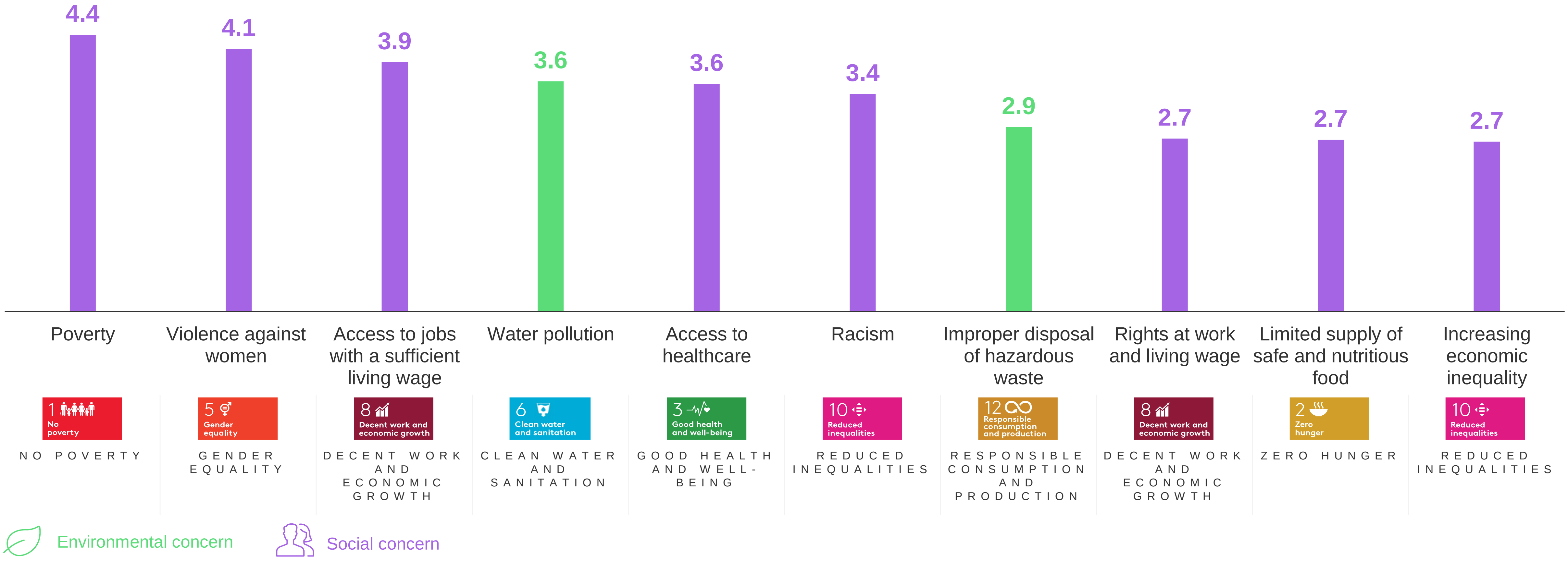
LOVE and BELONGING
friendship, connection, family, intimacy

SAFETY NEEDS
security, health, employment, resources

PHYSIOLOGICAL NEEDS
air, water, food, shelter, sleep

This is why the top sustainability concerns for South Africans are mainly social

South African top 10 concerns for business on sustainability (out of 43 topics)



"Closing the value-action gap is the holy grail in overcoming the barriers to sustainable consumption."

The United Nations

However, what people value and what they do is very different

99% **of South Africans want to live a sustainable lifestyle**

But only…

15% **of people are actively changing their behaviour**

SUSTAINABLE TRANSFORMATION

Source: Kantar Sustainability Sector Index Middle East and Africa 2023
Q26 Out of the below statements, which ones would you be willing to do all the time, if it was easy, accessible and there was nothing stopping you from doing it?
Q27 And how frequently do you do any of these activities? (Most of the time and All the time).
n =800

This value-action gap does not mean South Africans are not ready for change

It is an **opportunity** for brands to offer consumers the options to make better choices

And it's expected of brands because we live in the era of the public

		
ERA OF THE PRODUCT	**ERA OF THE PERSON**	**ERA OF THE PUBLIC**
Up to 1960s	1960s to mid-2000s	Mid-2000s onwards
What you own Better stuff Product features	Who you are Better self Lifestyle aspiration	How you contribute Better society Higher purpose

MEDIA AND SOCIAL MEDIA

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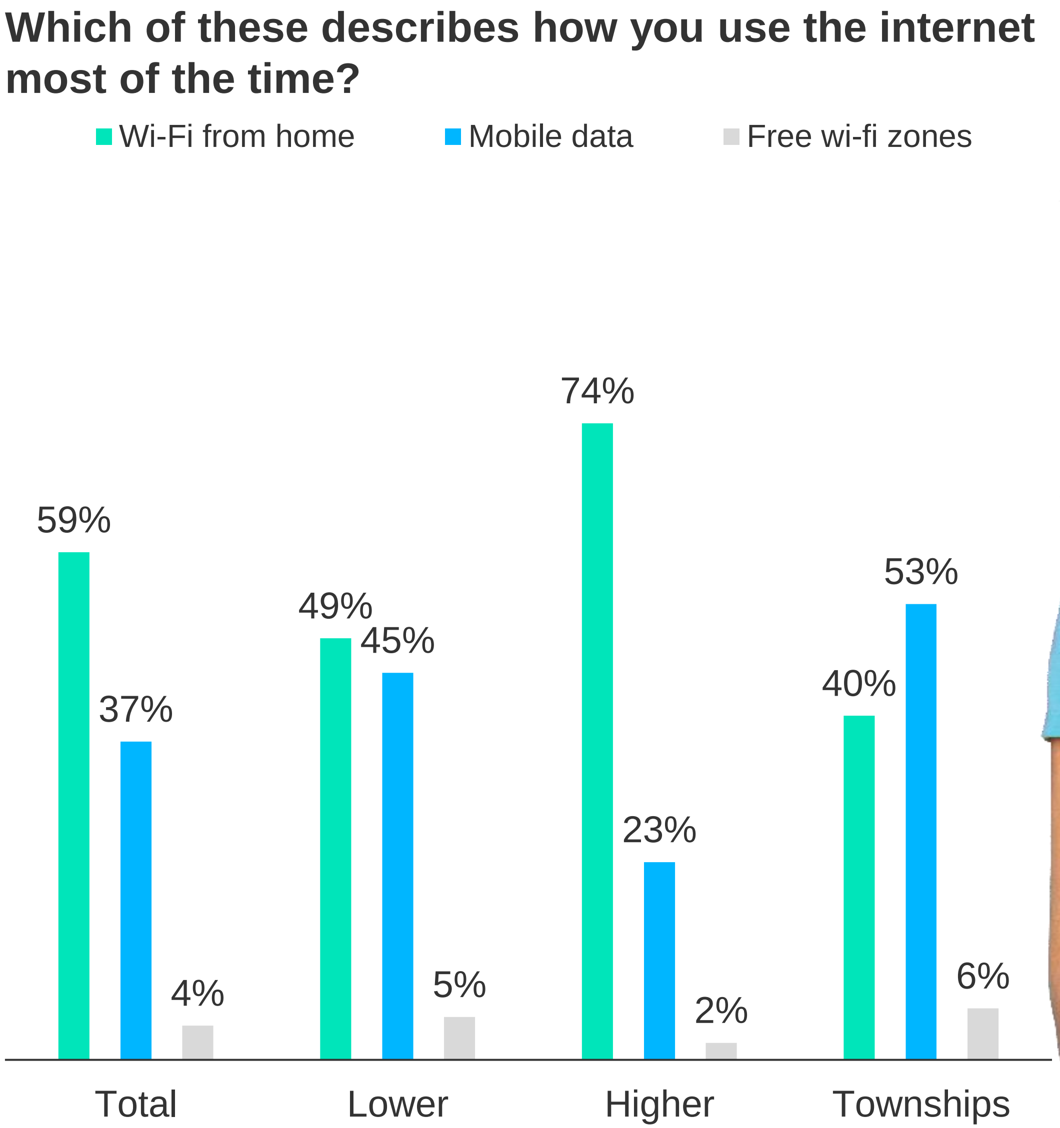
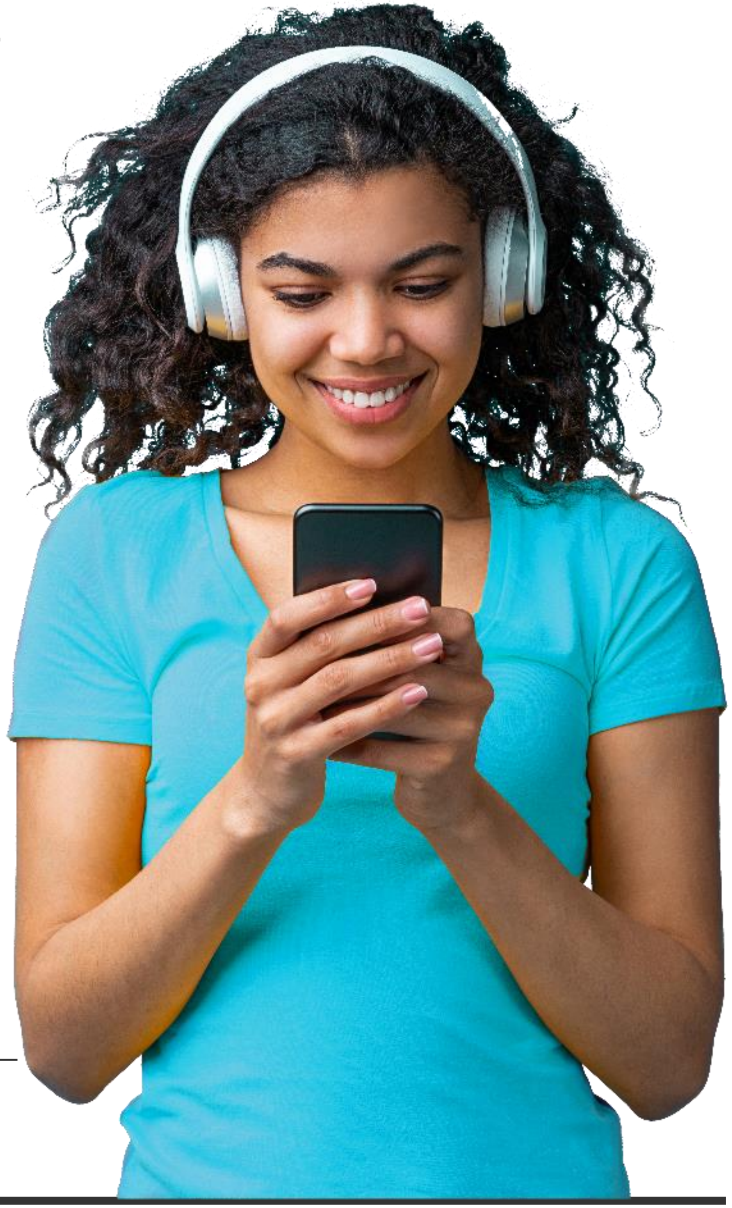
Two-thirds of South Africans access the internet from home networks

With the inverse use of the internet during loadshedding





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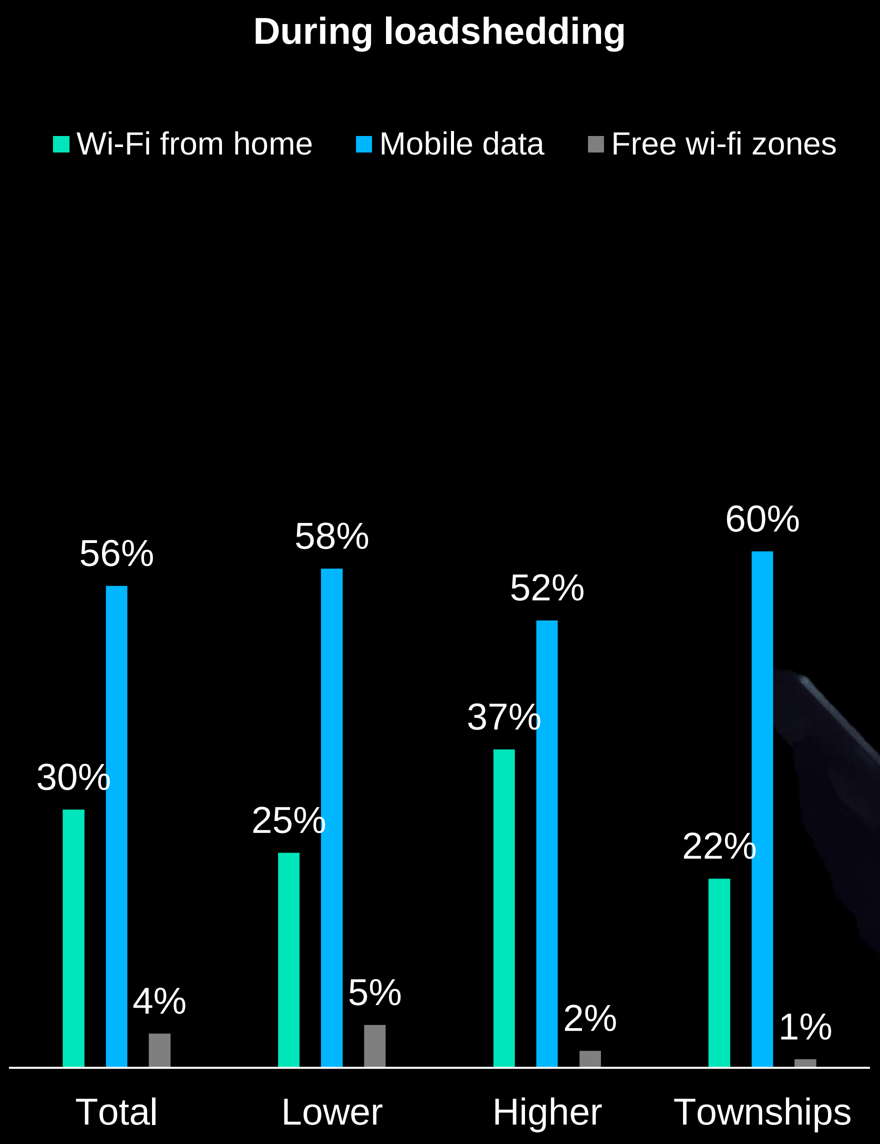
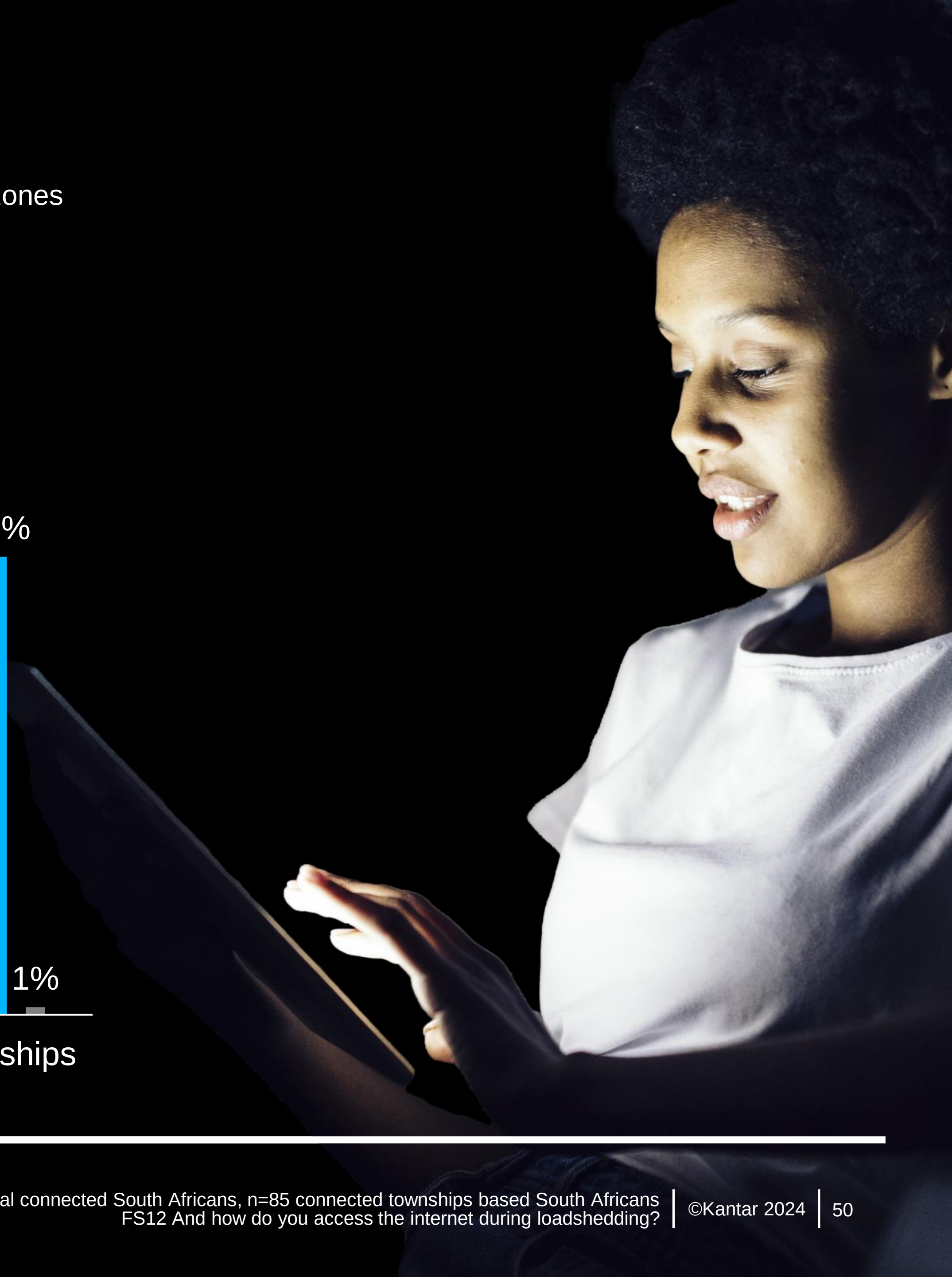
Base n=500; n=415 Total connected South Africans, n=85 connected townships based South Africans
FS10 Which of these best describes how you access the internet most of the time?
FS11 How frequently do you recharge data on your mobile device?

With the inverse use of the internet during loadshedding



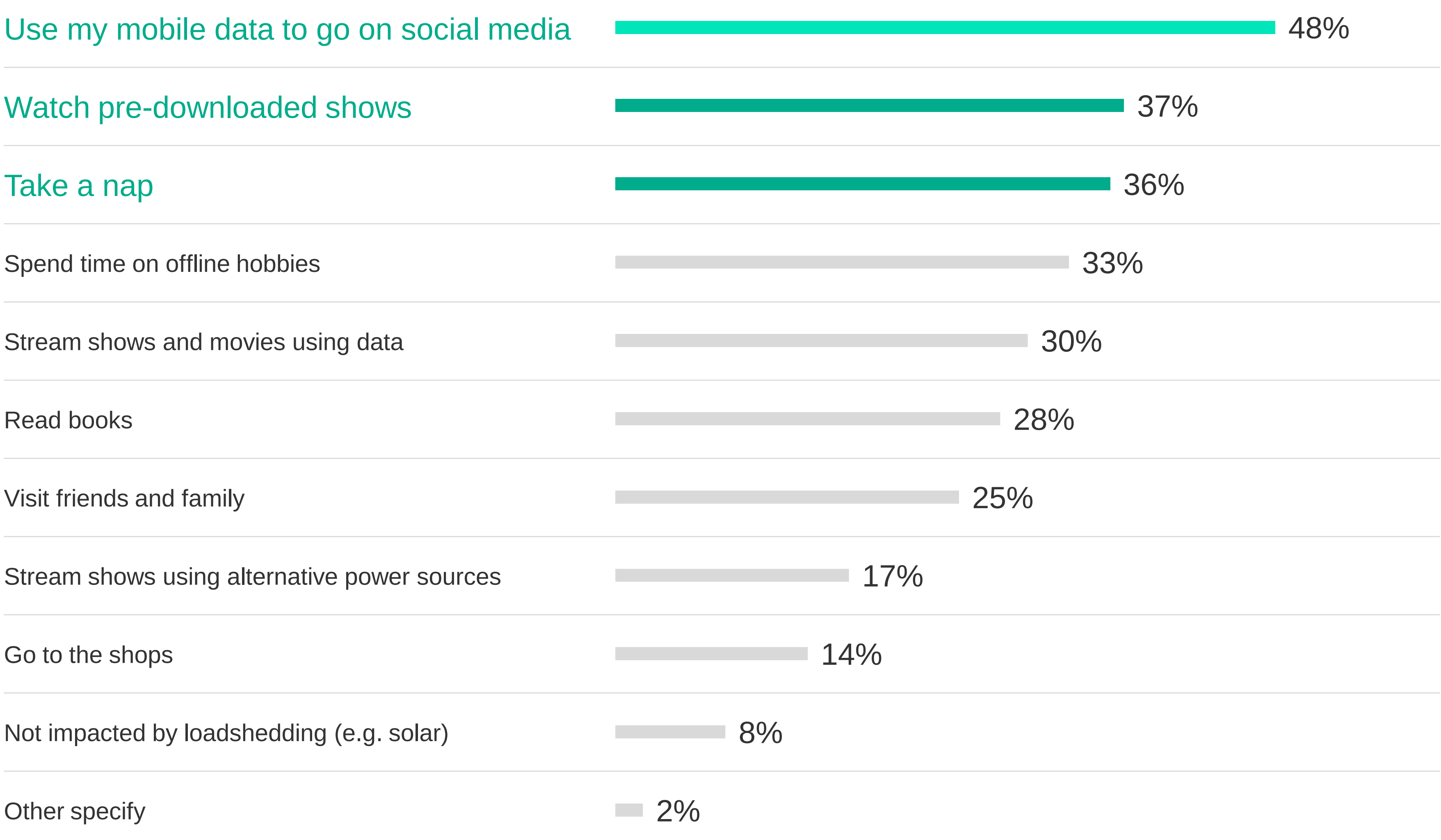


Base n=500; n=415 Total connected South Africans, n=85 connected townships based South Africans
FS12 And how do you access the internet during loadshedding?

Yet despite the high cost of data and the trade-offs we are making on household products and groceries,

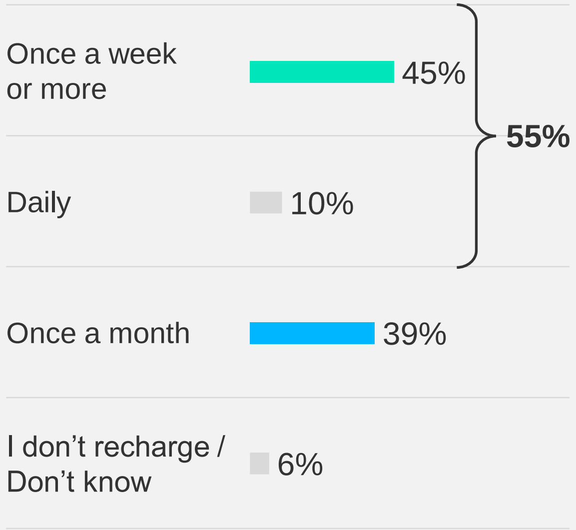
South Africans jump to their socials when loadshedding hits

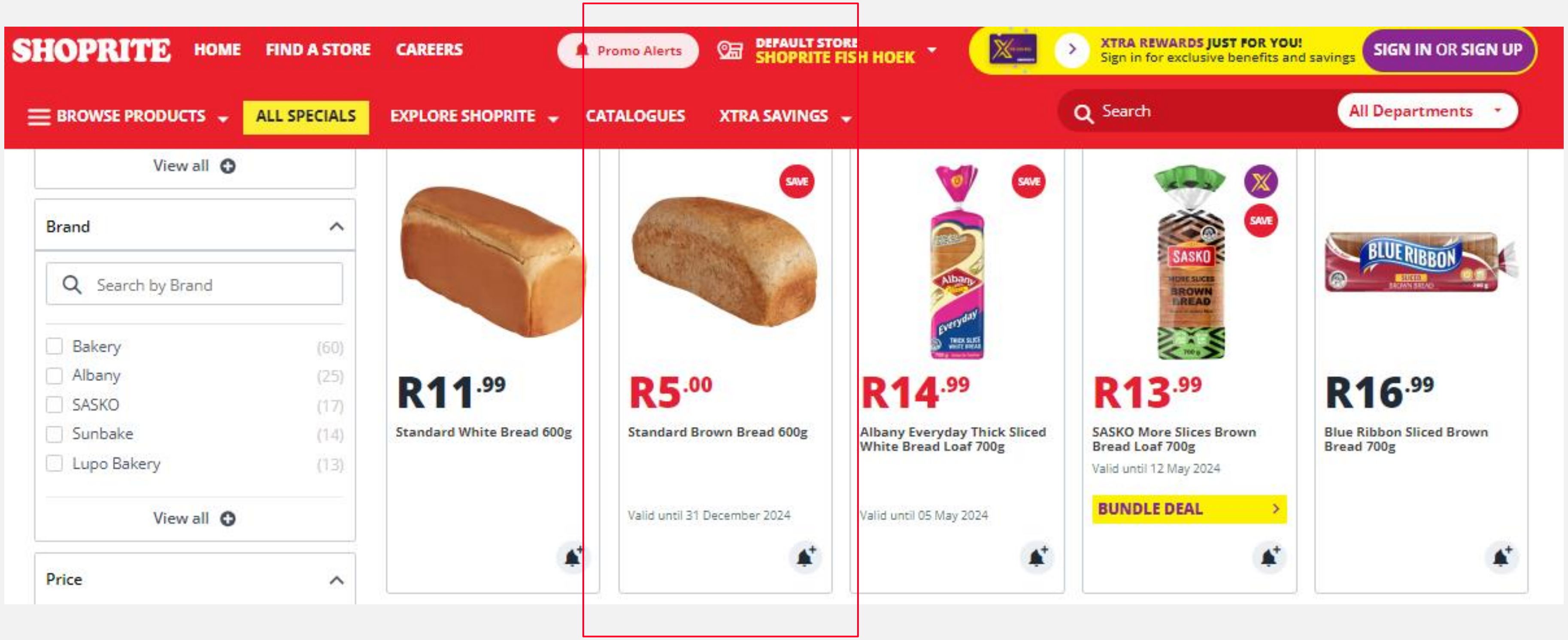
Activities during loadshedding



Base n=500; n=415 Total connected South Africans, n=85 connected townships based South Africans
LPT How do you spend your time when there is loadshedding during the day and when you are not working?

How frequently do you recharge data on your mobile device?





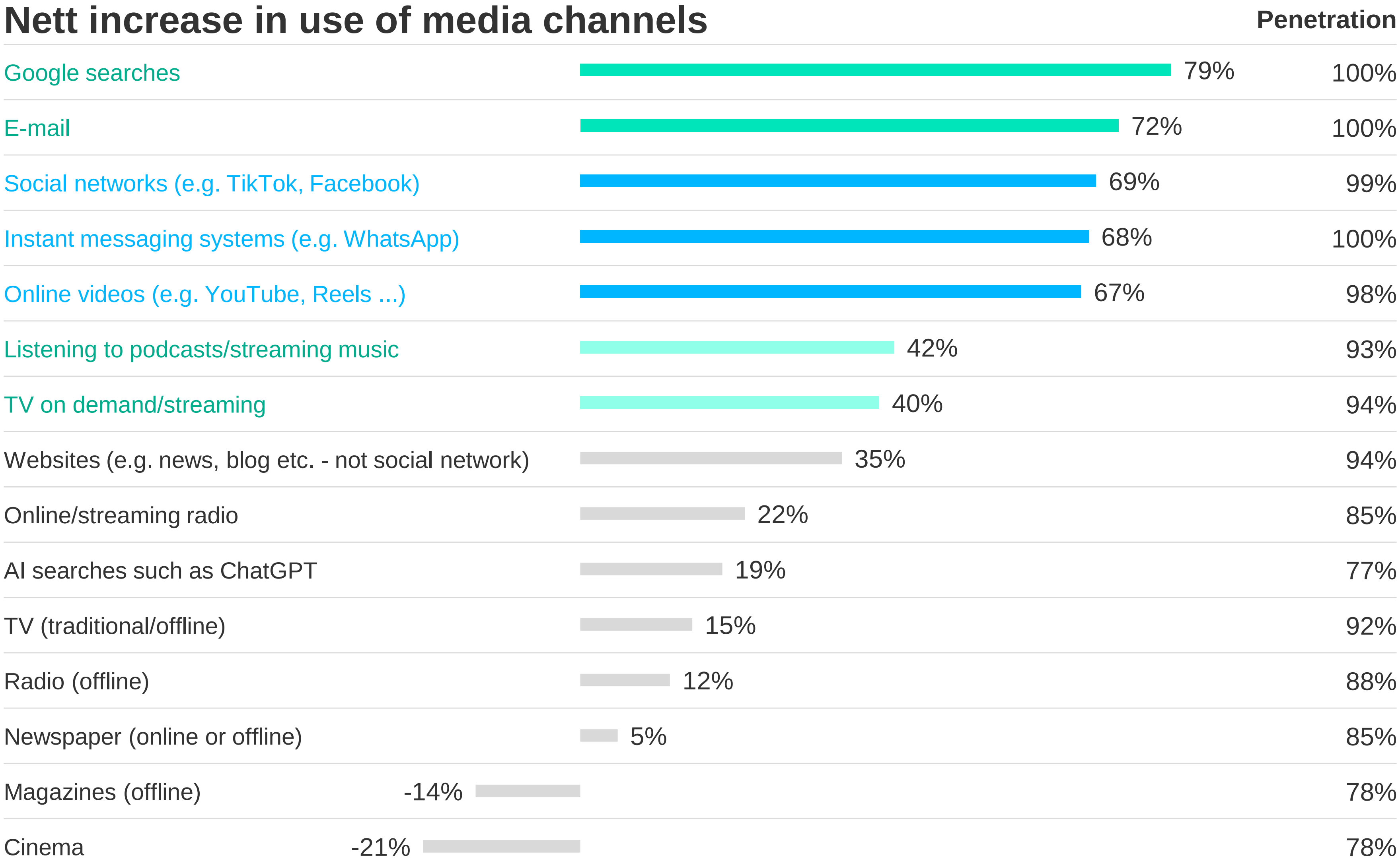
With an average price of $1.81 (R33.21) for 1GB of data across 46 plans, South Africa is ranked as 149/236 globally

That’s a trade of six loaves of bread to watch 30-40 minutes on standard definition of streamed content

And our high usage of online platforms continues to grow in frequency

Nett increase in TV growth has increased from 4% to 15%

Nett increase in use of media channels

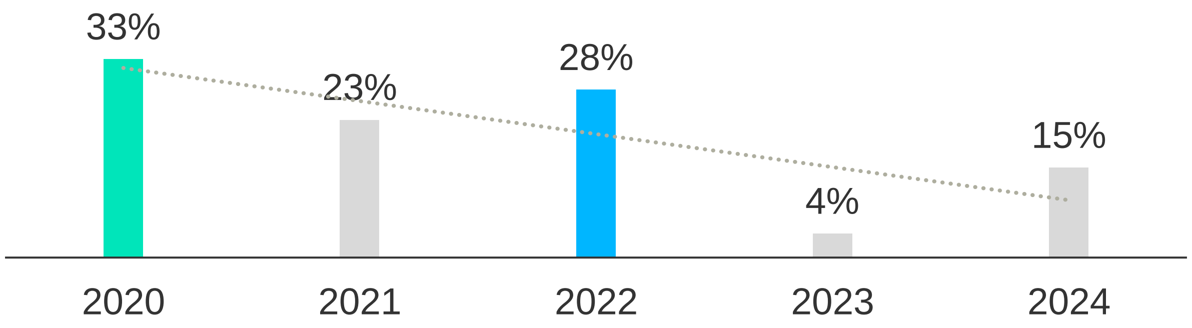


Growth in TV usage is slowing down over time,

accelerated by loadshedding

TV nett growth

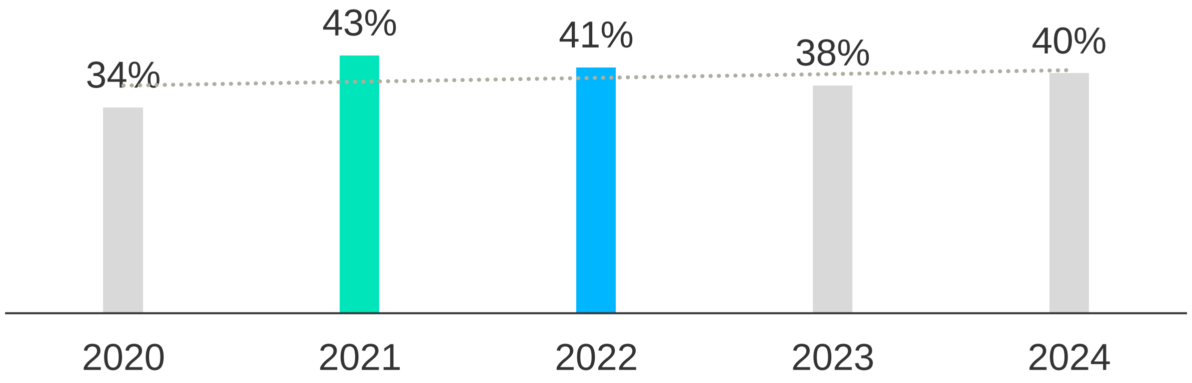
(increase – decrease), 2020-2023



STAGE 5 loadshedding in 2023

STAGE 3 loadshedding in 2024

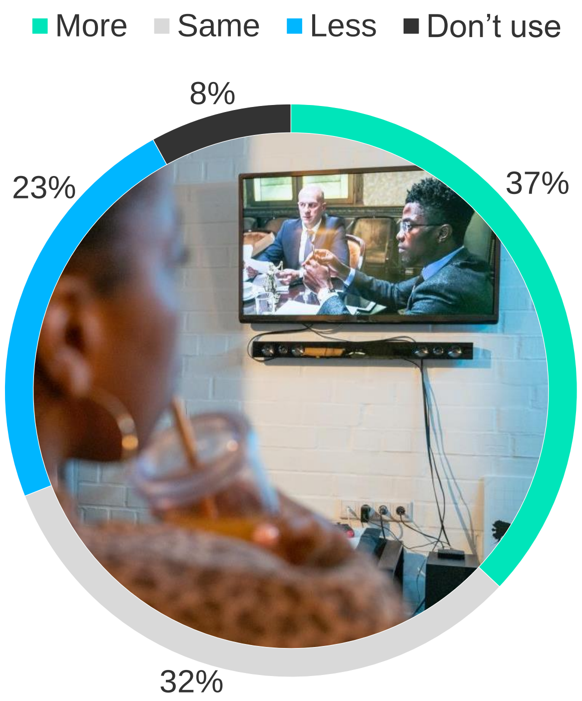
Nett TV on demand/streaming



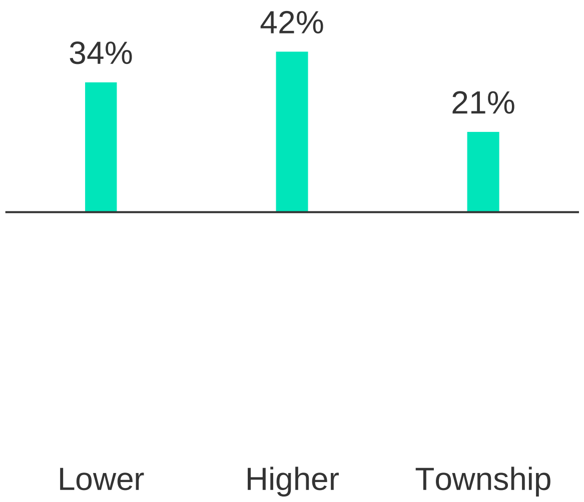
Base n=500; n=415 Total connected South Africans, n=85 connected townships based South Africans
MD1 In comparison to last year, are you using the following media...

Higher income (esp R10-39k) showing high growth in the watching of traditional TV; lower income and township moving away from TV; younger ages watching more TV are driven by those in Limpopo, Mpumalanga and KZN

Total SA:
Traditional TV

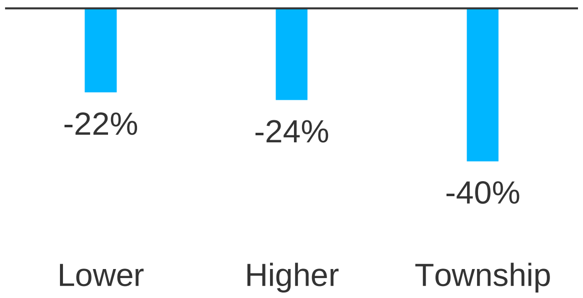


Watching more



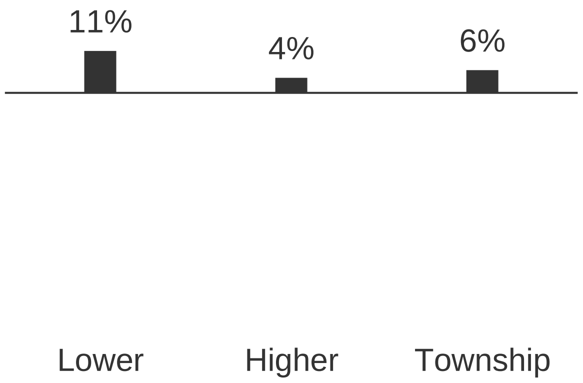
18-34	+44%
35+	+29%

Watching less



18-34	-23%
35+	-23%

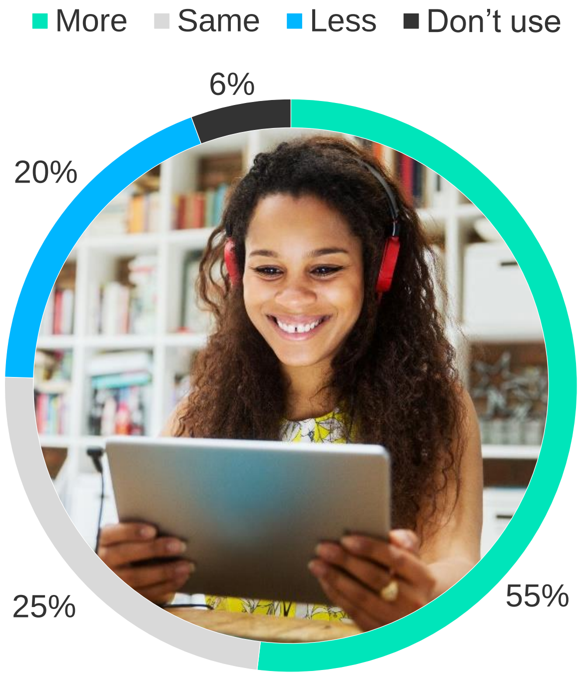
Don’t watch



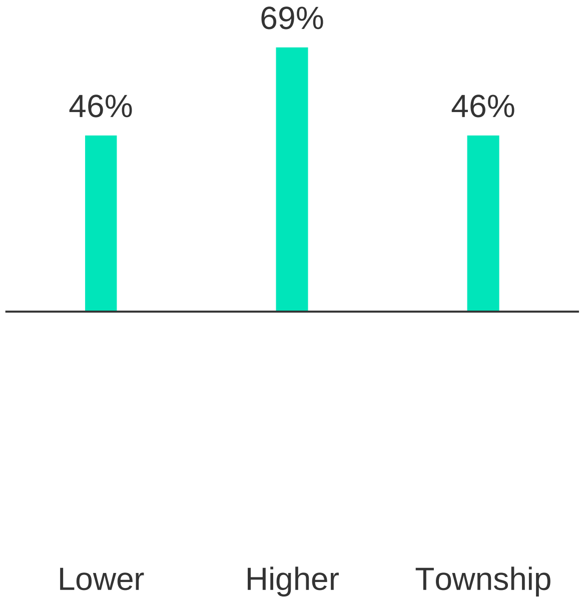
18-34	6%
35+	11%

Higher income again showing high growth in the watching of TV on demand

Total SA:
TV on demand/ streaming

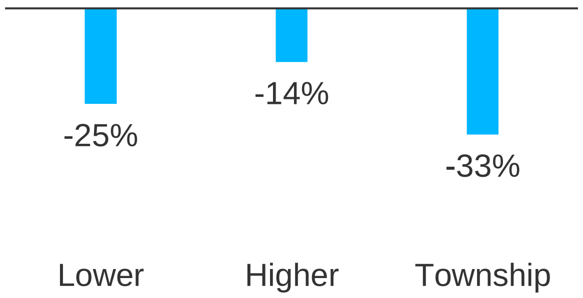


Watching more



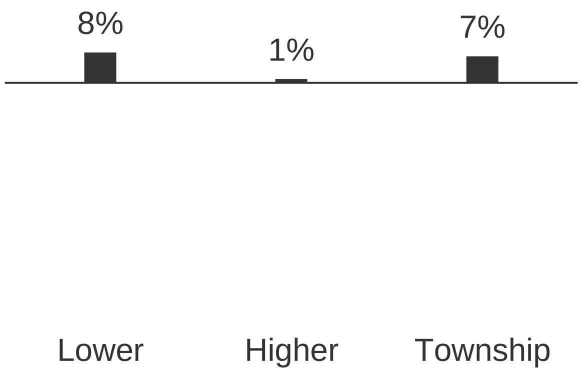
18-34	+60%
35+	+50%

Watching less



18-34	-20%
35+	-22%

Don't watch

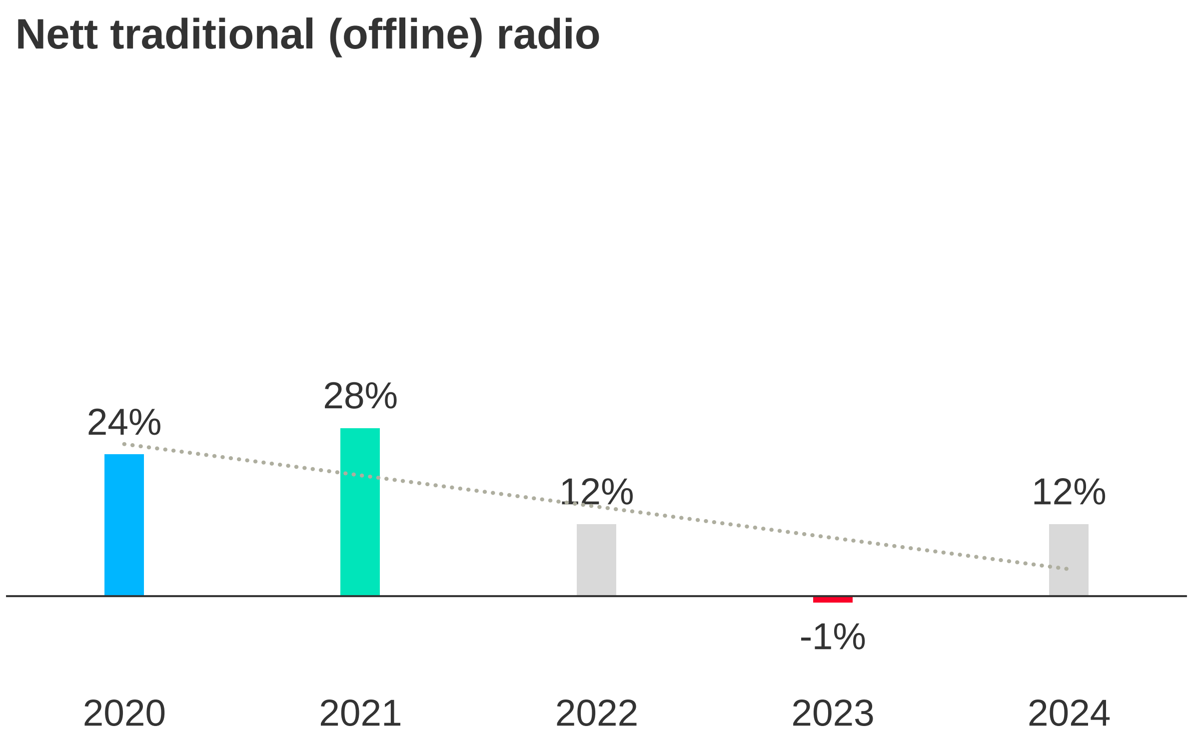


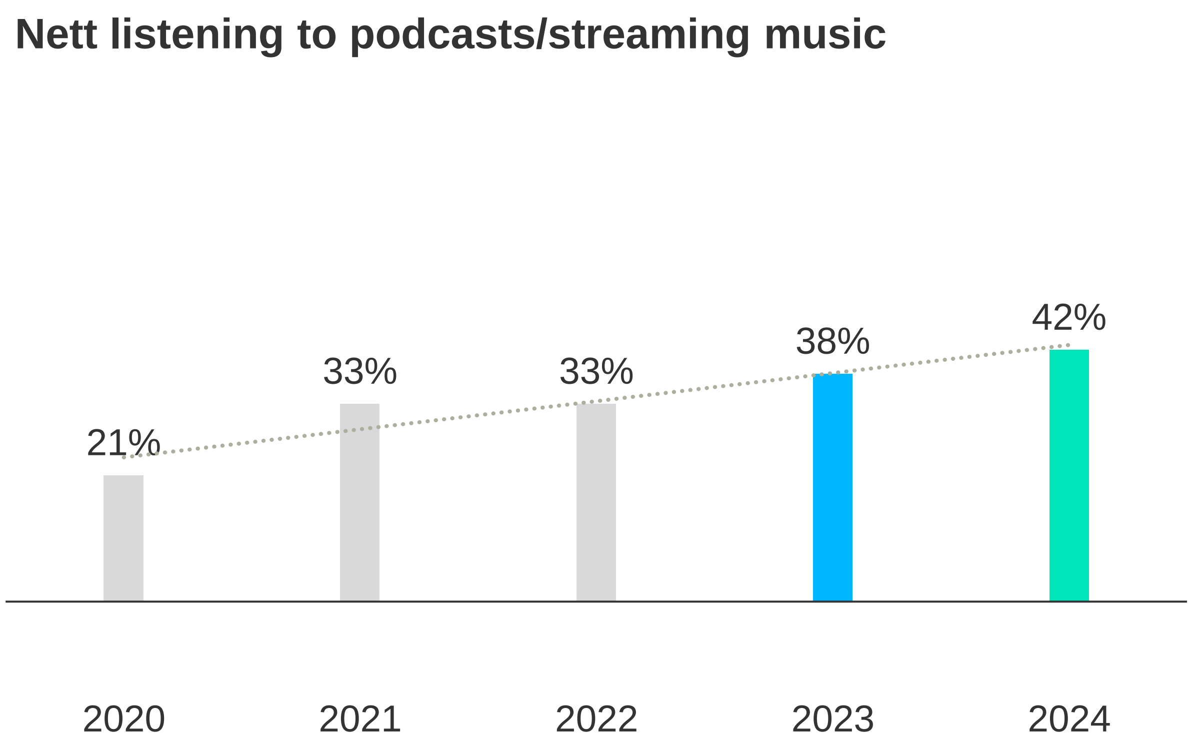
18-34	3%
35+	8%

Base n=500; n=415 Total connected South Africans, n=85 connected townships based South Africans
MD1 In comparison to last year, are you using the following media...

Podcasts showing strong growth over time,

as listening to offline radio slows



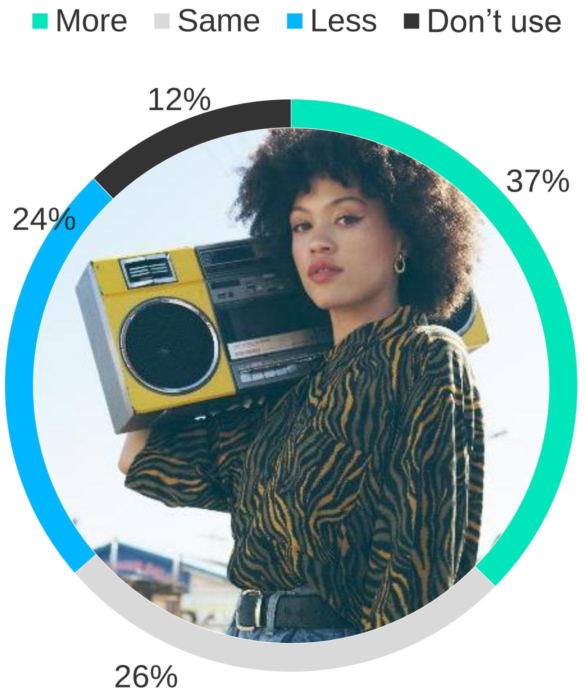


Base n=500; n=415 Total connected South Africans, n=85 connected townships based South Africans
MD1 In comparison to last year, are you using the following media...

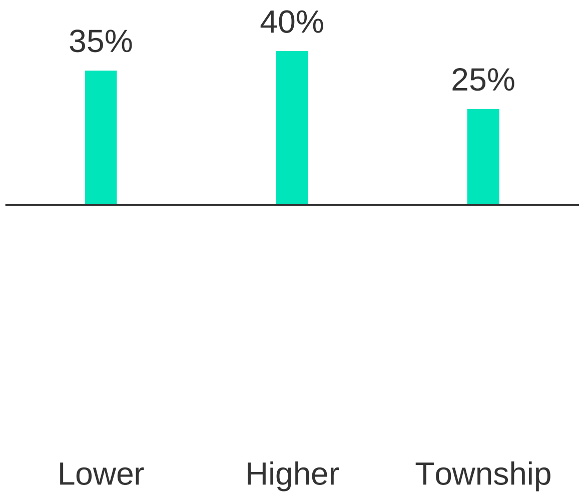
While still growing,

traditional radio resonates less with townships and an increasing number of people are cutting it from their media channel repertoire

Total SA:
Offline Radio

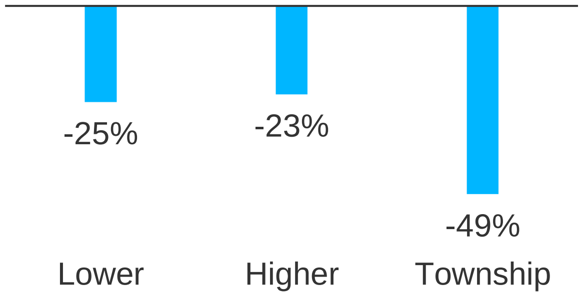


Listening more



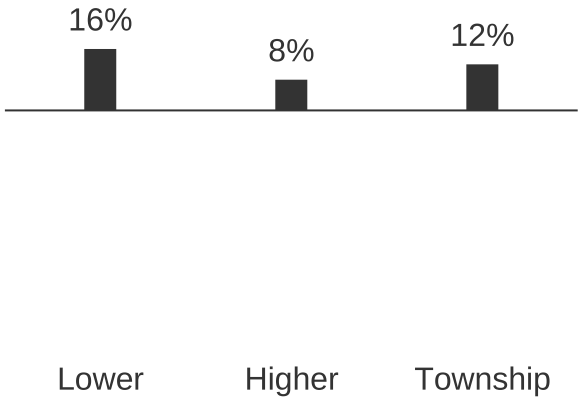
18-34	+38%
35+	+35%

Listening less



18-34	-26%
35+	-24%

Don’t listen



18-34	12%
35+	14%

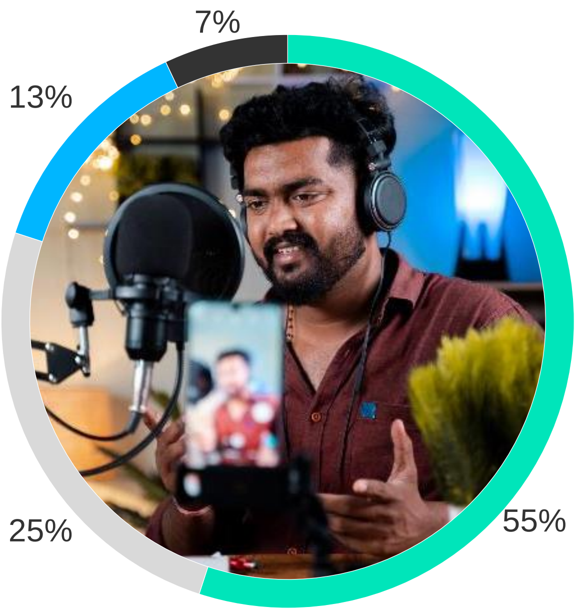
Base n=500; n=415 Total connected South Africans, n=85 connected townships based South Africans
MD1 In comparison to last year, are you using the following media...

High growth across the country in listening to podcasts,

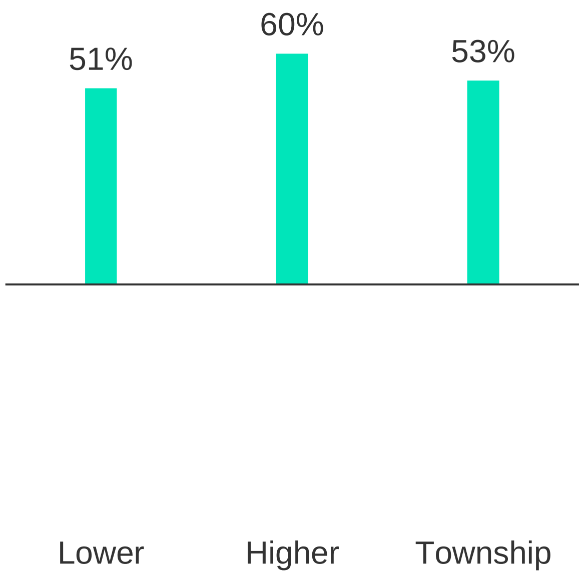
with a quarter of those in townships listening less than they used to

Total SA:

Podcasts and streaming music

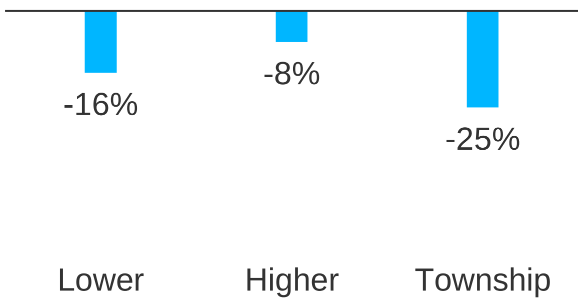


Listening more



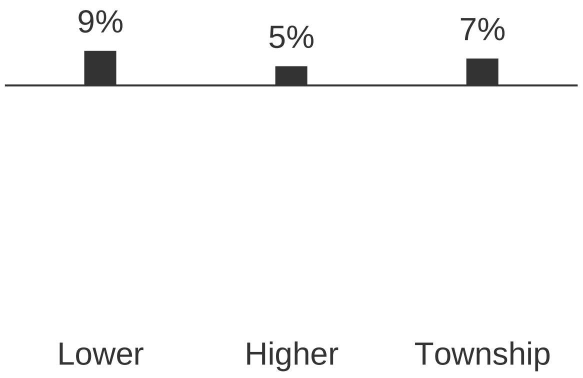
18-34	+65%
35+	+44%

Listening less



18-34	-14%
35+	-12%

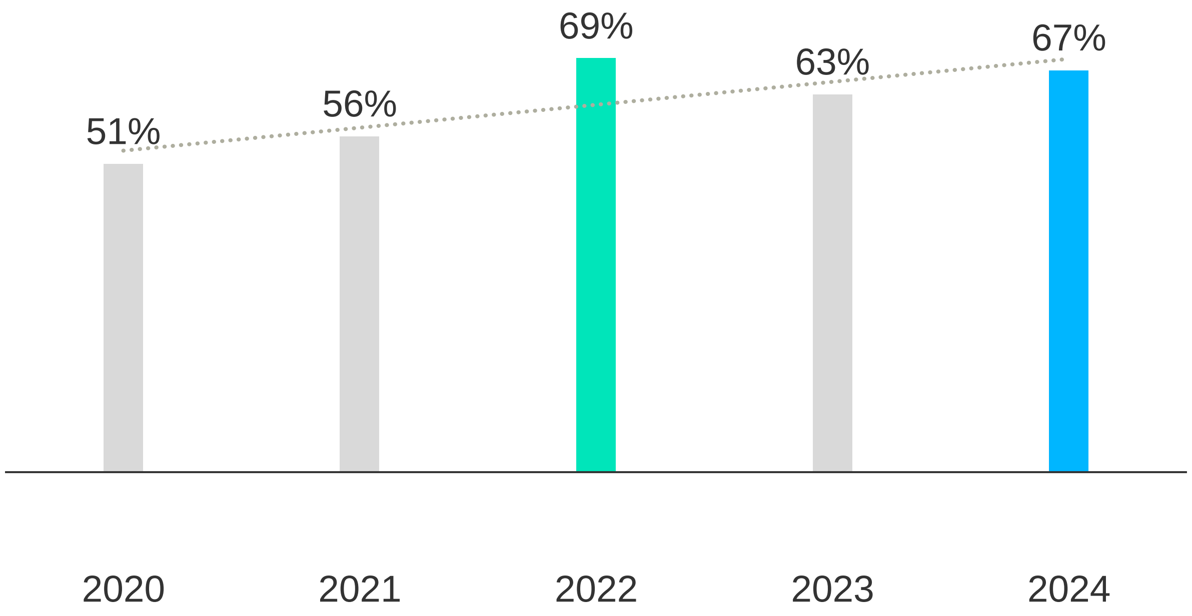
Don't listen



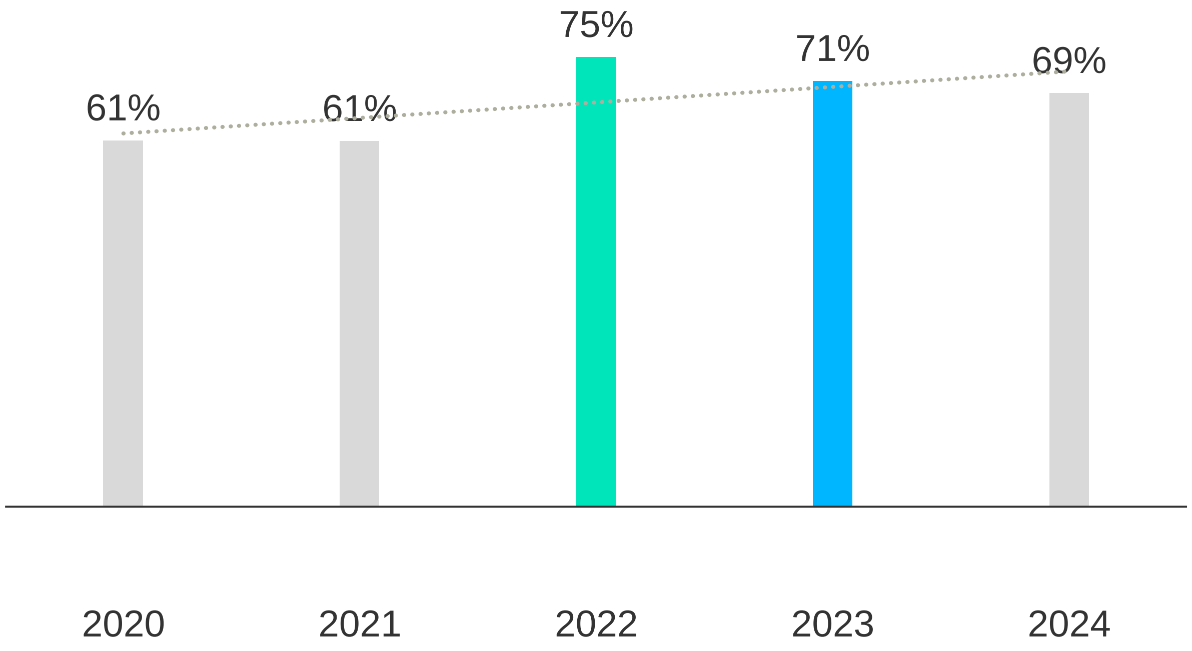
18-34	3%
35+	12%

Strong continued increase in the use of online video and social media

Nett online video



Social media

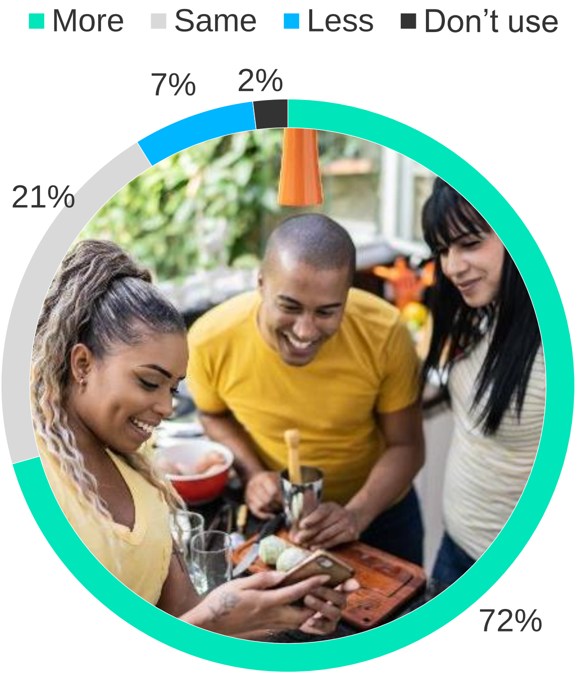


Base n=500; n=415 Total connected South Africans, n=85 connected townships based South Africans
MD1 In comparison to last year, are you using the following media...

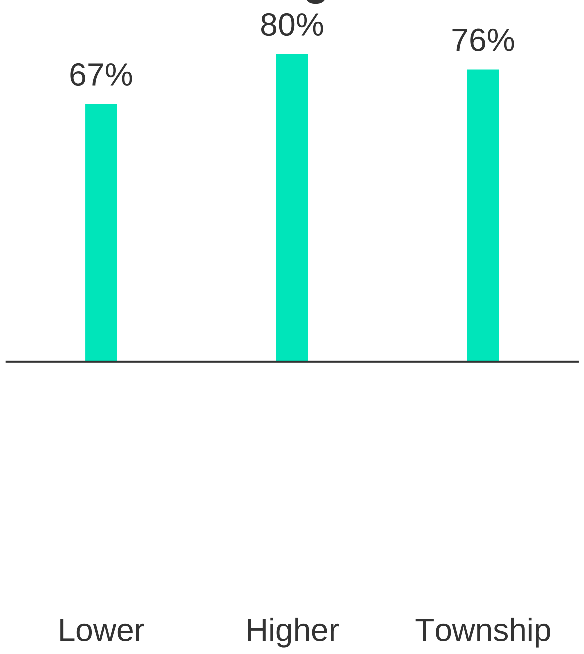
Growth in the use of online videos continues its strong path of growth,

across ages and incomes groups

Total SA:
OLV

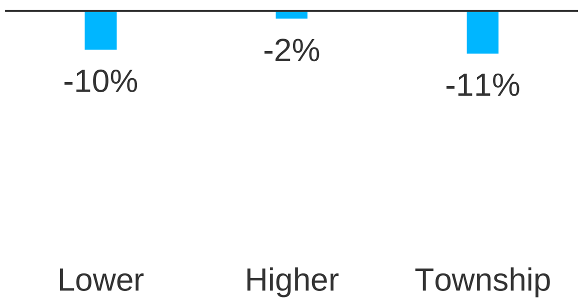


Watching more



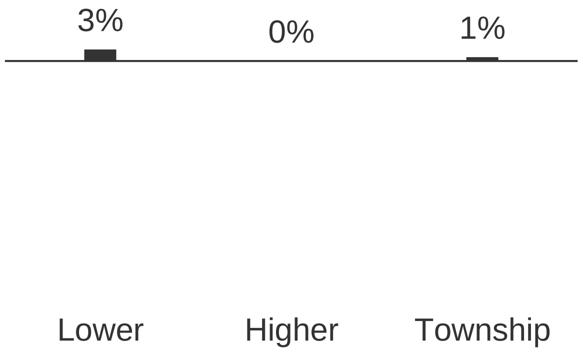
18-34	+76%
35+	+68%

Watching less



18-34	-7%
35+	-7%

Don't watch



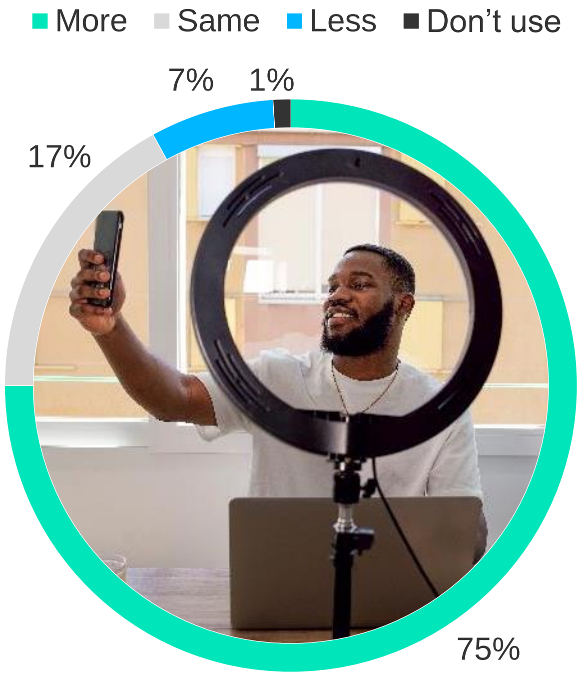
18-34	1%
35+	3%

Base n=500; n=415 Total connected South Africans, n=85 connected townships based South Africans
MD1 In comparison to last year, are you using the following media...

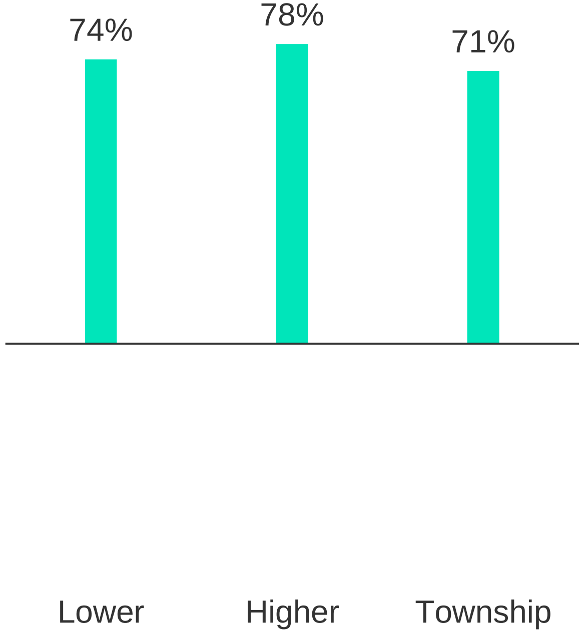
High growth in the use of socials,

across all ages and groups

Total SA:
Socials

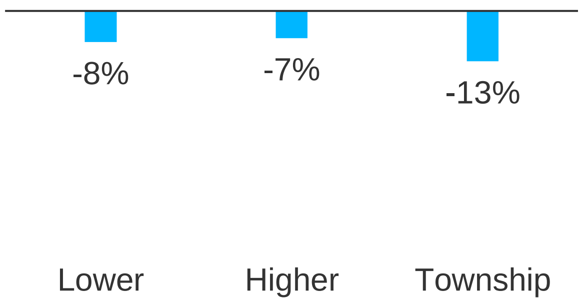


Using more



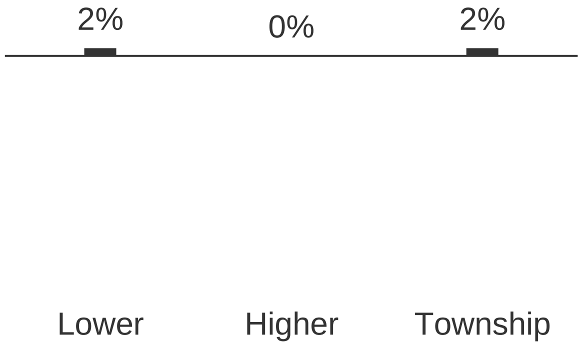
18-34	+80%
35+	+72%

Using less



18-34	-10%
35+	-5%

Don't use



18-34	2%
35+	1%

Base n=500; n=415 Total connected South Africans, n=85 connected townships based South Africans
MD1 In comparison to last year, are you using the following media...

Looking at these growing social media brands,

YouTube remains top of the list and TikTok is now in third position

Nett increase in use of social media brands (Total SA)

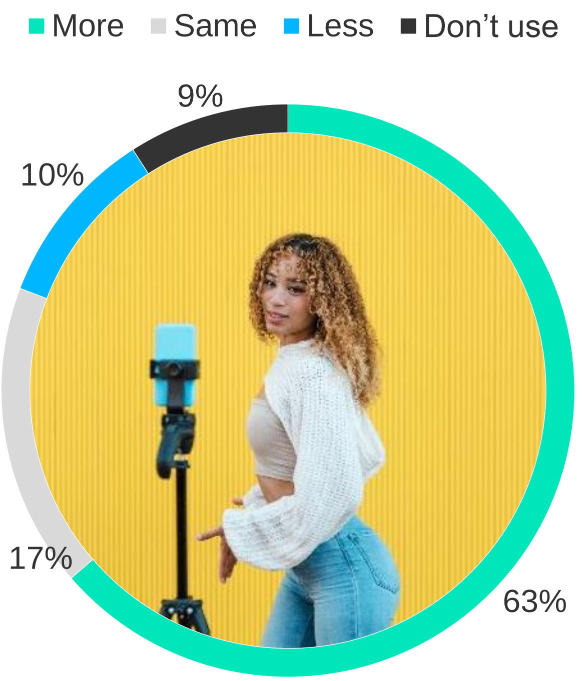
	Nett increase	Penetration
WhatsApp	71%	100%
YouTube (videos and education)	61%	98%
TikTok	53%	91%
YouTube (podcasts/music)	50%	95%
Facebook Messenger	38%	93%
Facebook Reels	35%	89%
Facebook Stories	34%	92%
Facebook Marketplace	28%	89%
X (previously Twitter)	27%	80%
Instagram Reels	26%	80%
Spotify (podcasts/music)	24%	80%
Instagram stories	23%	80%
Web conferencing platforms e.g. Zoom, MS Teams, Skype, Google Meet etc.	21%	83%
LinkedIn	20%	79%
Pinterest	13%	77%
Apple (podcasts/music)	11%	57%

Base n=500; n=415 Total connected South Africans, n=85 connected townships based South Africans
MD2 How has your use of these social networks and instant messaging platforms changed in comparison to last year, specifically considering the frequency of loadshedding?

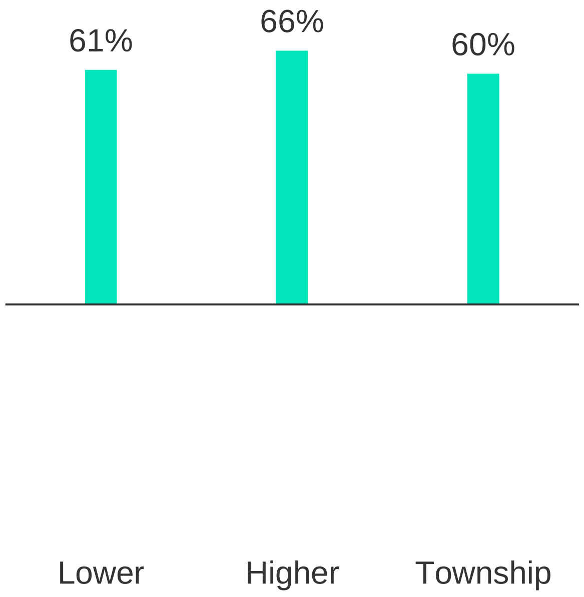
Similar and high growth across income,

with higher growth amongst the youth; declines in townships can only be attributed to data costs for a high data platform

Total SA:
TikTok

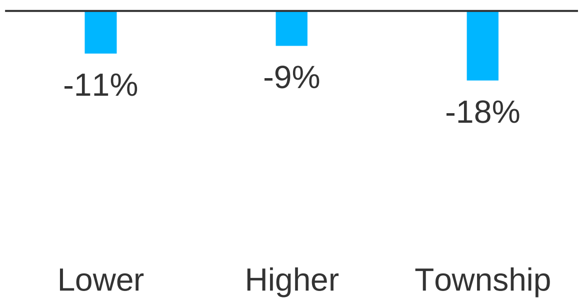


Using more



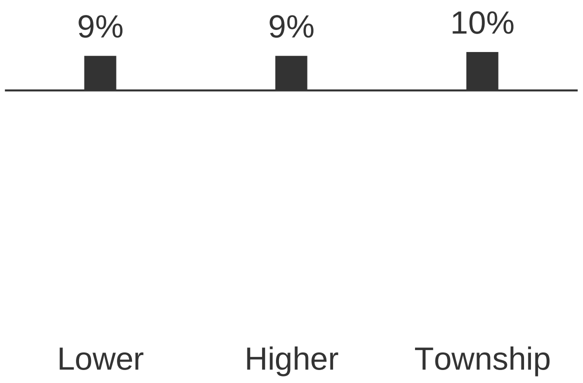
18-34	+70%
35+	+55%

Using less



18-34	-11%
35+	-10%

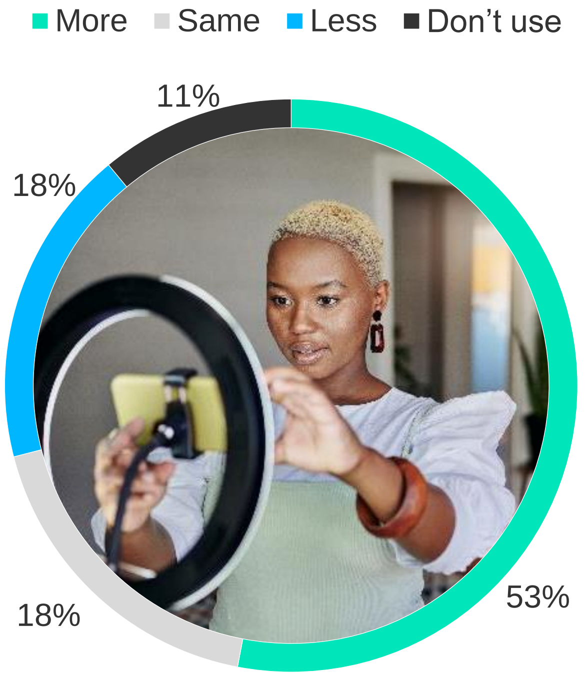
Don't use



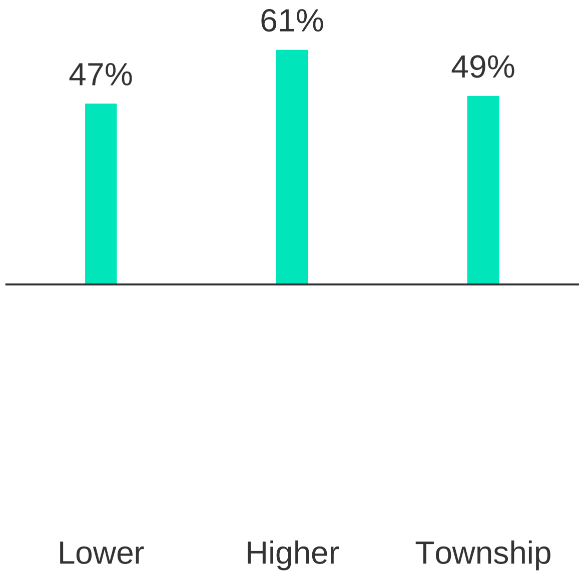
18-34	4%
35+	16%

Higher growth and less drop-off amongst younger South Africans

Total SA:
Facebook Reels

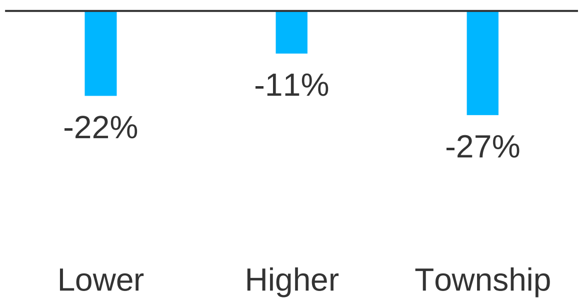


Using more



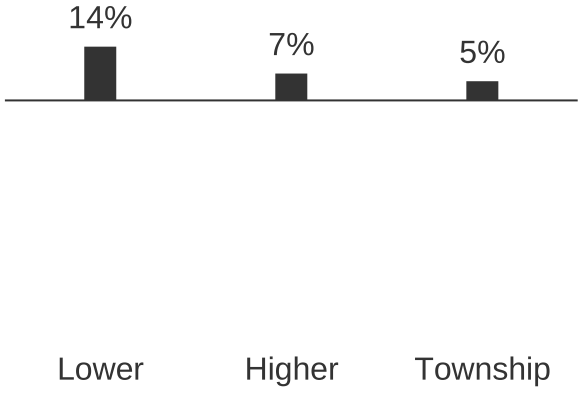
18-34	+63%
35+	+42%

Using less



18-34	-16%
35+	-21%

Don't use

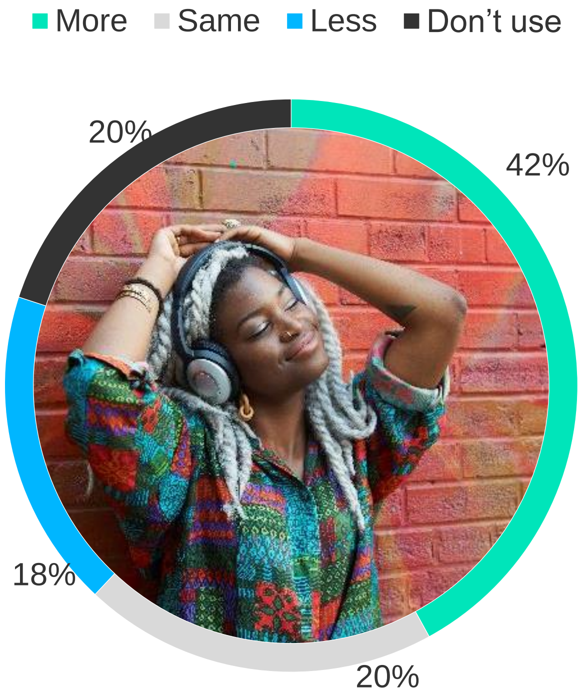


18-34	7%
35+	17%

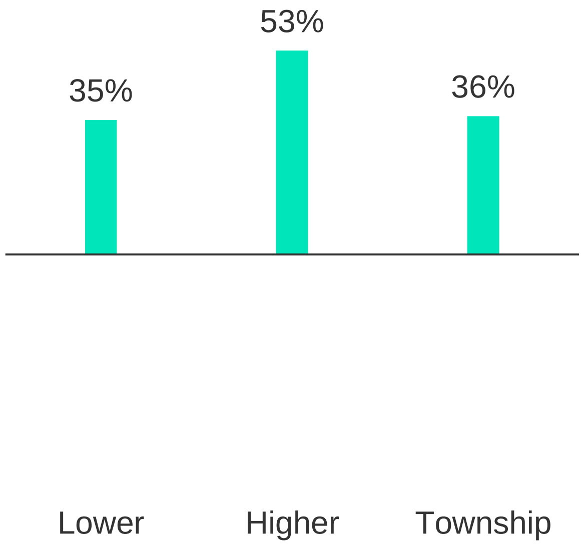
Base n=500; n=415 Total connected South Africans, n=85 connected townships based South Africans
MD2 How has your use of these social networks and instant messaging platforms changed in comparison to last year, specifically considering the frequency of loadshedding?

Higher growth and less drop-off amongst younger South Africans

Total SA:
Spotify

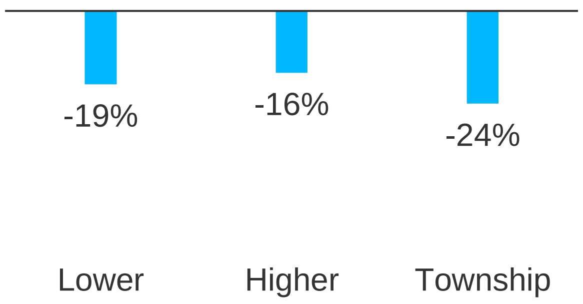


Using more



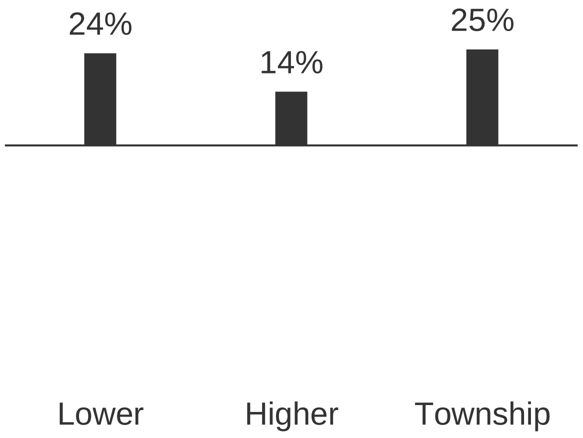
18-34	+55%
35+	+29%

Using less



18-34	-20%
35+	-16%

Don't use



18-34	11%
35+	31%

KANTAR MZANSI BAROMETER

Base n=500; n=415 Total connected South Africans, n=85 connected townships based South Africans
MD2 How has your use of these social networks and instant messaging platforms changed in comparison to last year, specifically considering the frequency of loadshedding?

Top 10 ranked platforms

growing in frequency of usage (after WhatsApp)

Age	1	2	3	4	5	6	7	8	9	10
18 – 24	YouTube (for videos and education)	YouTube (for music and podcasts)	TikTok	Facebook Reels	Facebook Messenger	Facebook Stories	Instagram Reels	Instagram Stories	Facebook Marketplace	Spotify (for music and podcasts)
25 – 34	YouTube (for videos and education)	TikTok	YouTube (for music and podcasts)	Facebook Reels	Facebook Messenger	Facebook Stories	Instagram Reels	Instagram Stories	Spotify (for music and podcasts)	X (previously Twitter)
35 – 44	YouTube (for videos and education)	TikTok	YouTube (for music and podcasts)	Facebook Messenger	Facebook Marketplace	LinkedIn	Facebook Reels	Facebook Stories	X (previously Twitter)	Spotify (for music and podcasts)
45+	YouTube (for videos and education)	YouTube (for music and podcasts)	TikTok	Facebook Messenger	Facebook Marketplace	Facebook Reels	X (previously Twitter)	Web conferencing platforms (e.g. Zoom, MS Teams, Skype, Google Meet etc.)	Facebook Stories	Instagram Reels

Total South Africa

Top 10 growing-in-frequency platforms

(after WhatsApp)

Lower	YouTube (for videos and education)	TikTok	YouTube (for music and podcasts)	Facebook Messenger	Facebook Stories	Facebook Reels	Facebook Marketplace	Instagram Reels	X (previously Twitter)	Instagram Stories
Higher	YouTube (for videos and education)	TikTok	YouTube (for music and podcasts)	Facebook Reels	Facebook Stories	Facebook Messenger	X (previously Twitter)	Spotify (for music and podcasts)	Web conferencing platforms (e.g. Zoom, MS Teams, Skype, Google Meet etc.)	Facebook Marketplace
Townships	YouTube (for videos and education)	TikTok	LinkedIn	YouTube (for music and podcasts)	Facebook Stories	Facebook Messenger	X (previously Twitter)	Facebook Reels	Other social networks	Facebook Marketplace

Total South Africa

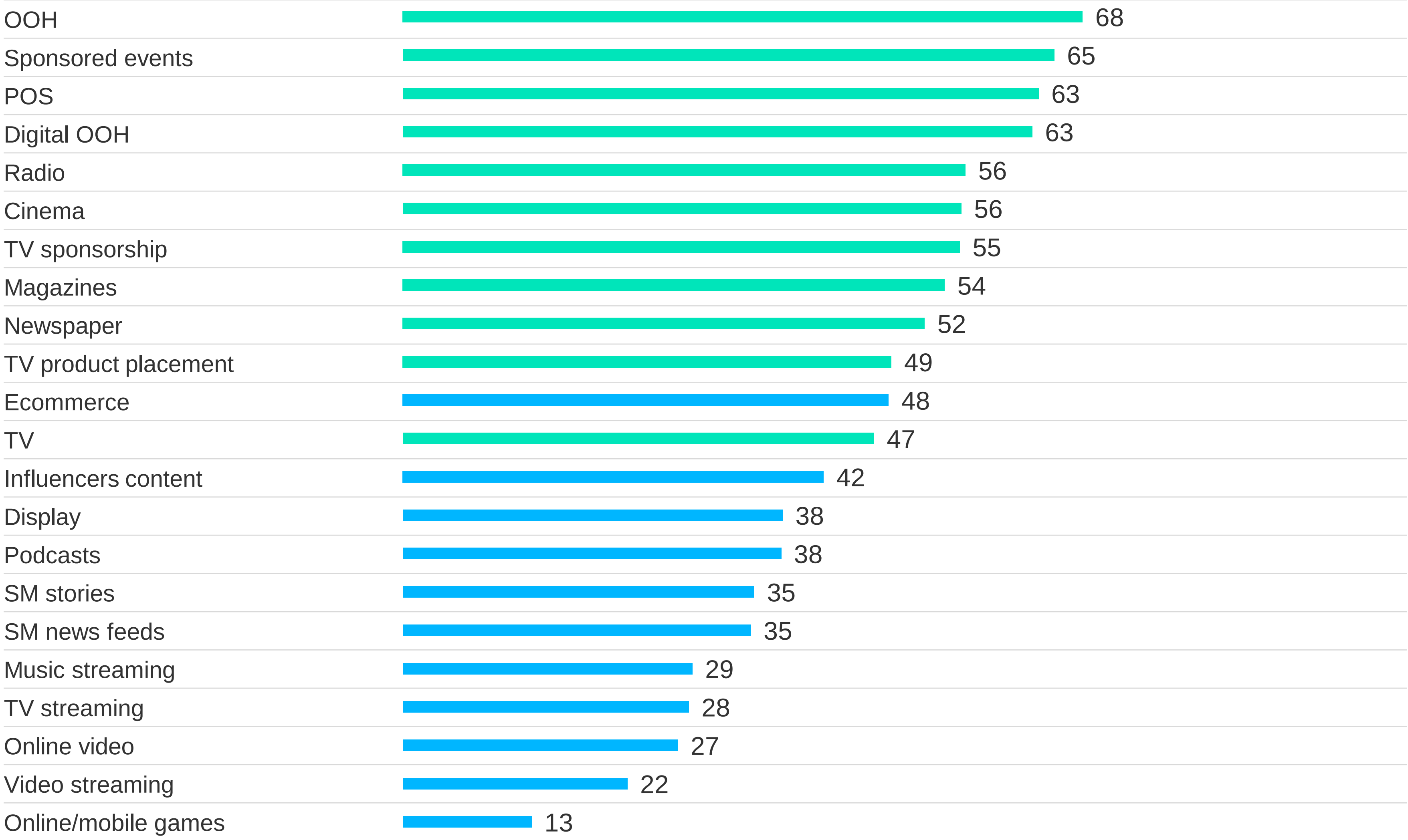
Base n=500; n=415 Total connected South Africans, n=85 connected townships based South Africans
MD2 How has your use of these social networks and instant messaging platforms changed in comparison to last year, specifically considering the frequency of loadshedding?

So, high penetration and high growth in frequency of online platforms,

yet preference is to be spoken to in offline spaces

Why?

Receptivity to advertising



n=650, Kantar Media Reactions, 2023 Advertising Equity: Average of 1) Net +ve Ad receptivity (from 5 point scale) and 2) Net +ve Ad attitudes. Base: exposed to advertising on channel.

1. Because online brands have their own **equity** that we need to respect when communicating on them

2. Because these are entertainment platforms and our brands are not automatically the star of the show


WHAT'S NEXT?
How do I sell my brand in this consumer reality?
KANTAR MZANSI BAROMETER

Two mantras, three hacks

Easy to mind

Put your brand's price in context – I am worth it

Give your message the best possible opportunity to land

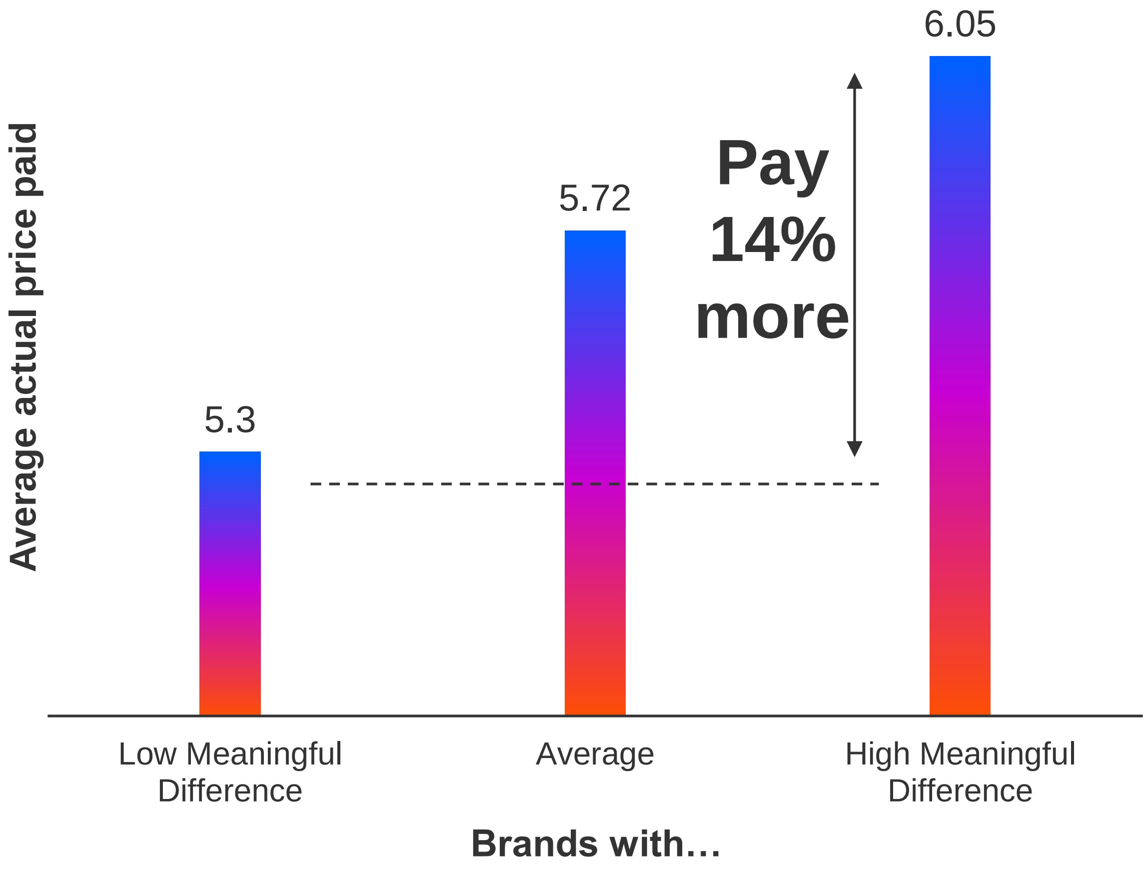
Easy to find

Be present and win in the last yard

PUT YOUR BRAND'S PRICE IN CONTEXT

"I am worth it"

Which is what we call being “meaningfully different”



GIVE YOUR MESSAGE THE BEST POSSIBLE OPPORTUNITY TO LAND

Extra media pressure with the right creative will help your brand grow

Good creative quality

ADS WITH HIGH CREATIVE QUALITY ARE…

6x

More profitable in the long term (equity)

Meaning, difference, salience

4x

More profitable in the short term (sales)

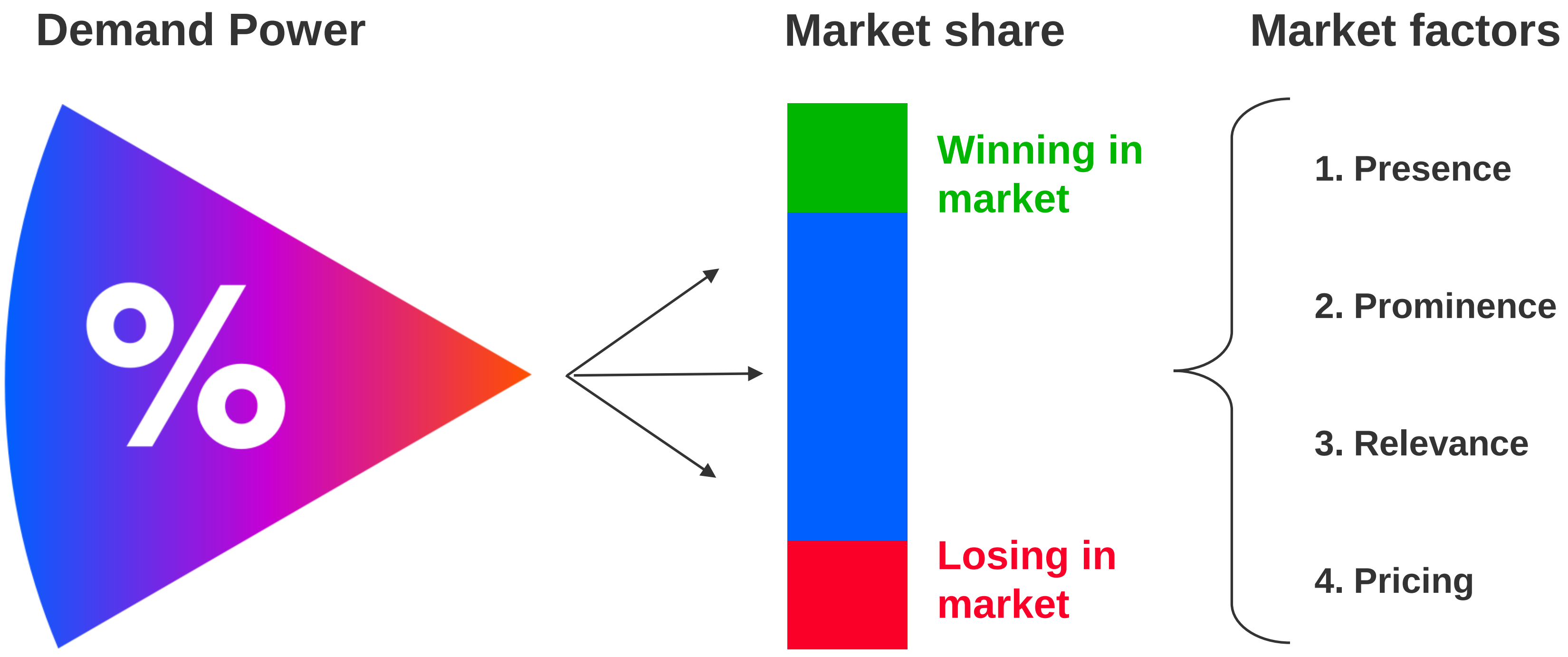
Impact, persuasion

**Based on 450 individual ads from 51 campaigns*

Source: The long and the short of it, Les Binet and Peter Field. The relationship between ESOV and share growth

BE PRESENT AND WIN IN THE LAST YARD

Be present and ready to fend off the competition on shelf and online



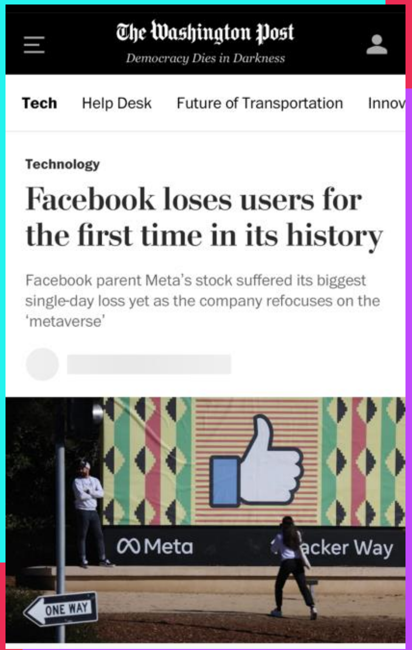
Entertainment Reimagined

How TikTok is rewriting the future of entertainment

Confidential & Proprietary

2022

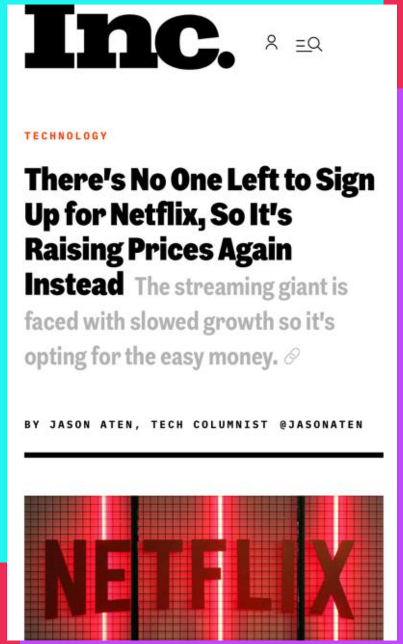
The time is right for a shift in entertainment.


The Washington Post
Democracy Dies in Darkness
Tech | Help Desk | Future of Transportation | Innov

Technology

Facebook loses users for the first time in its history

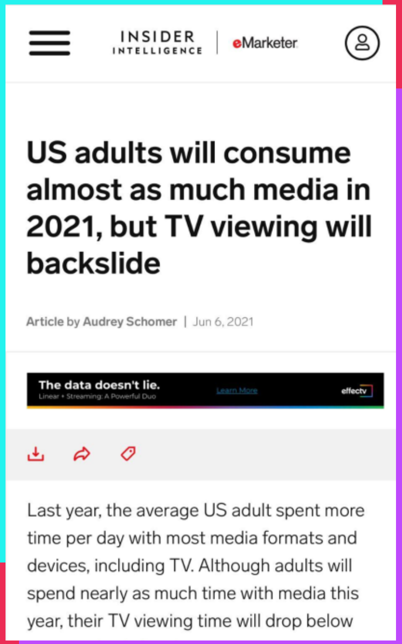
Facebook parent Meta's stock suffered its biggest single-day loss yet as the company refocuses on the 'metaverse'


Inc.

TECHNOLOGY

There's No One Left to Sign Up for Netflix, So It's Raising Prices Again Instead The streaming giant is faced with slowed growth so it's opting for the easy money.

BY JASON ATEN, TECH COLUMNIST @JASONATEN


INSIDER INTELLIGENCE | eMarketer

US adults will consume almost as much media in 2021, but TV viewing will backslide

Article by Audrey Schomer | Jun 6, 2021

The data doesn't lie.

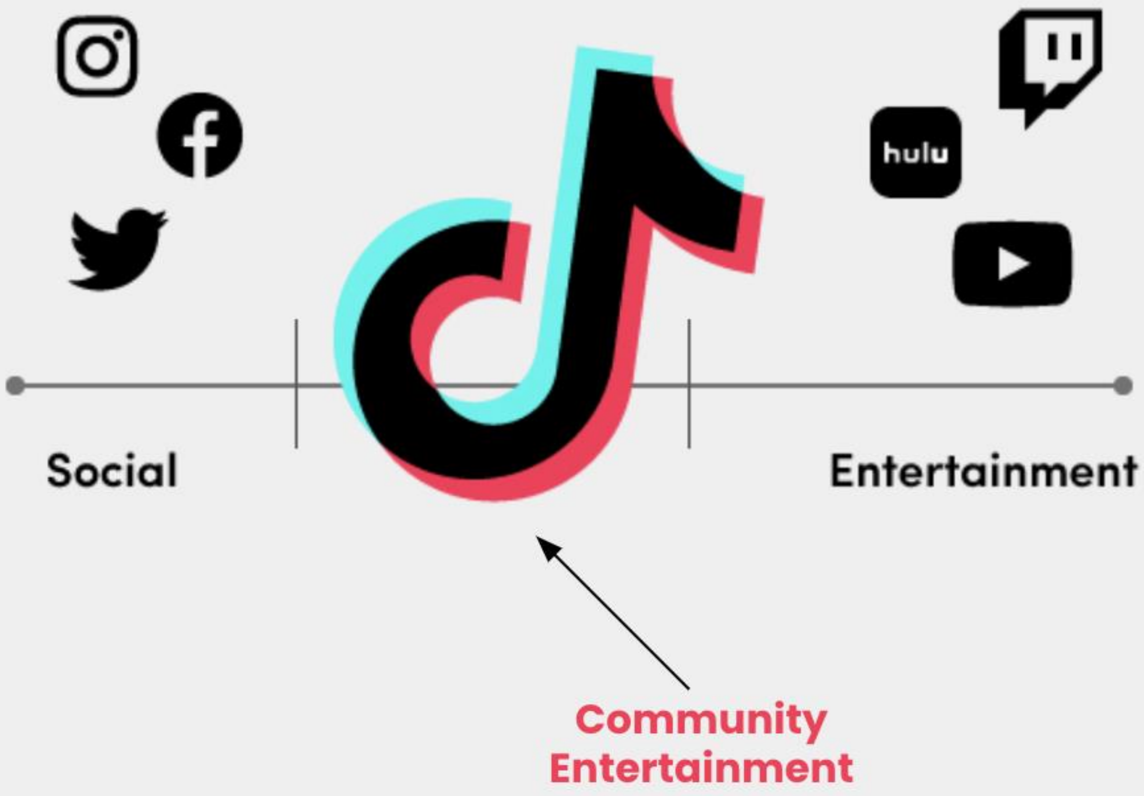
Last year, the average US adult spent more time per day with most media formats and devices, including TV. Although adults will spend nearly as much time with media this year, their TV viewing time will drop below

Social is Slipping

Streaming is Stalling

TV is Trailing

TikTok has changed entertainment. There's nothing like it in the world.



Endless and relatable **discovery** of new voices and ideas

Diverse and genuine **community** that embraces vulnerability

Highly inclusive **culture** of influence


@imasel119
00시 40분
Tracks
엘리베이터

a content graph

“The For You Page has become some of the most valuable digital real estate in the world.”

WIRED

Your consumer is fully engaged by content that is entertaining and the epitome of storytelling. It’s as human centric as it gets.

Immersive feed
Full screen, sound on

Short form
Bite-sized entertainment

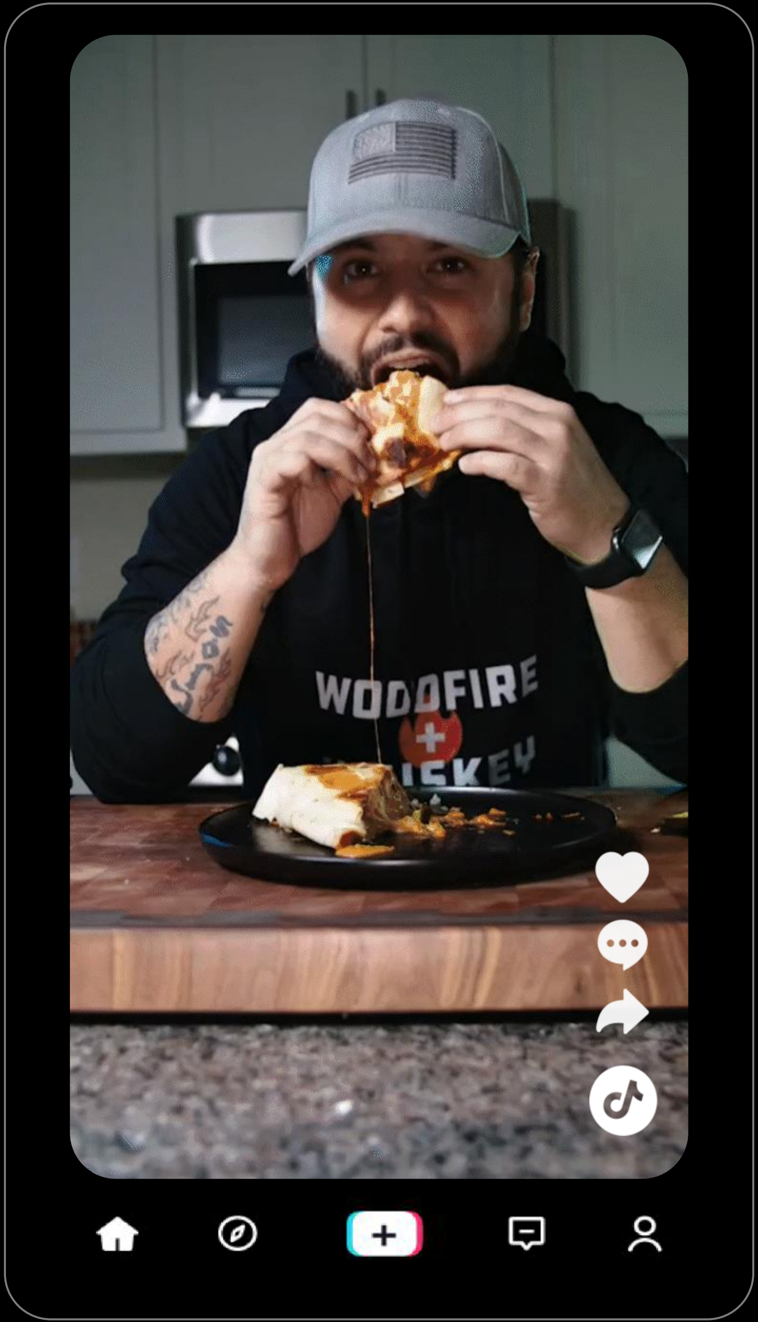
Community driven
Your window into the world via the For You Page

Curating a personalized stream of video entertainment that resonates.

70% of TikTok users **discover new brands & products** on the platform[2]

73% of users say they are open to **watching content that the algorithm suggests.**

Source:
1. TikTok Marketing Science Global Entertaining Ads Study (US Results) 2022 conducted by Marketcast;
2: TikTok Marketing Science Global Retail Path To Purchase Study (US results) conducted by Material August 2021



And this is Why

You don't check TikTok. You *watch* TikTok.

CONFIDENTIAL & PROPRIETARY

On TikTok,

There are many worlds of entertainment

Something for you, something for me, something for everyone

CONFIDENTIAL & PROPRIETARY

with audience that matters to you

TikTok has thousands of affinity groups and diverse Creators that span every interest and genre across all ages.

Achieve relevant reach without traditional targeting.

#Kasi

#TaxTok

#Plantok

#Spiritualtok

#MomsOfTikTok

#Amopiano

#Beautytok

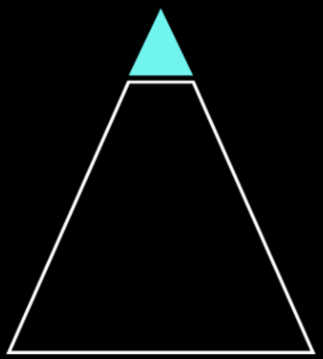
#CleaningTikTok

#EduTok

#Cooking

#satiktok

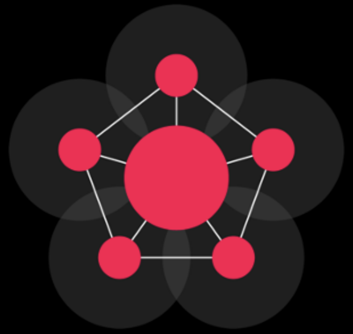
With the democratisation of creation shining a spotlight on everyone.



FROM

Pyramid of Influence

One to Many
Reach
Centralised
Exclusive



TO

Circles of Influence

Many to Many
Relevance
Decentralised
Inclusive

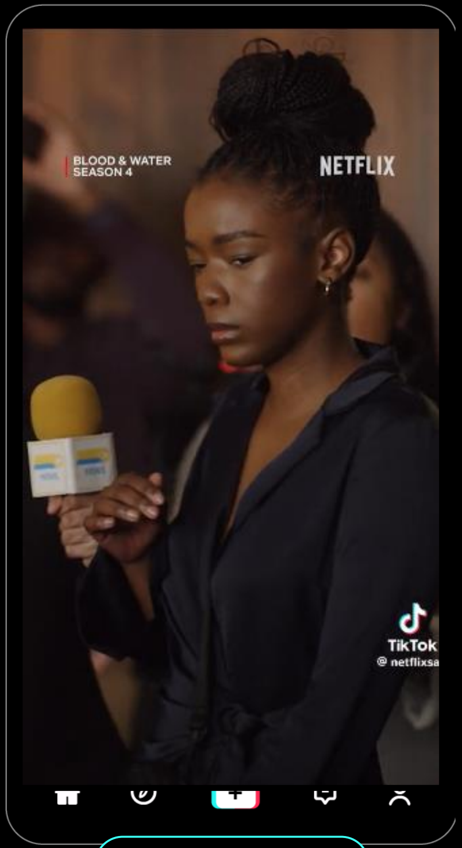
Creators

@Mpho_Pink
1.4M+ Followers

Cultural Icons

@TrevorNoah
1.3M+Followers

Publishers

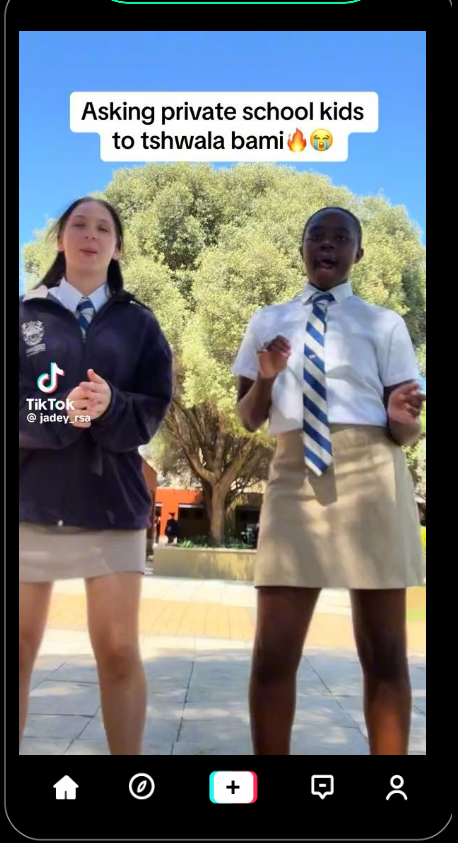


@Netlixsa
2.2M+ Followers

With the community adding depth to these worlds in real time.

#TikTokSouthAfrica

+72% YoY Growth



#Kasi

+125% YoY Growth

#FoodiesofTikTok

+66% YoY Growth

#StudentLife

+101% YoY Growth

#Safari

+230% YoY Growth

Source:
1: TikTok Internal Data, South Africa, March 2023 vs March 2024

Our community is coining a new language based on self-expression, vulnerability and affirmation.

Connecting to the values that define how people make content and how they interact with brands on TikTok

Trust

83%

viewers say that the messages in TikTok Creator videos are believable

Authenticity

76%

of viewers say that TikTok Creators feel "approachable"

Participation

63%

of viewers say they've created their own content after seeing a creator's video on TikTok

Source: TikTok Marketing Science Global Creators Like Me Study (US Results) 2021, conducted by Hotspex

On TikTok,

When advertising becomes entertaining, it creates impact for brands

Content on TikTok has evolved beyond entertaining, it is the driving force behind commerce itself.

Because consumers don’t have an ad problem…

Billy Blanks Jr.
Best ad I have ever seen. Wanted to be a part of it as much as I want to win! Awesome job y’all! 🥰
2023-2-26 Reply ♡ 8

bella bee
consider me entertained
2023-2-16 Reply ♡ 29

riley
This is the only advert where I've actually wanted to try this product now
2022-11-22 Reply ♡ 97

ainslie
no bcs this is literally the best ad ever
2023-7-7 Reply ♡ 2460

【Joshua³】
I can’t believe the first 10 min tiktok I actually watched was an add. 😅 bravo you eveil genius’ bravo 👏
2023-2-16 Reply ♡ 429

…they have a disruption problem.

TikTok voted #1 in ATTENTION and #1 in AD EQUITY[1]

	Capturing attention of Consumers	Delivering attention for marketers
1st	TikTok	TikTok
2nd	Instagram	YouTube
3rd	amazon	Instagram

+ Top 5 trusted video platform

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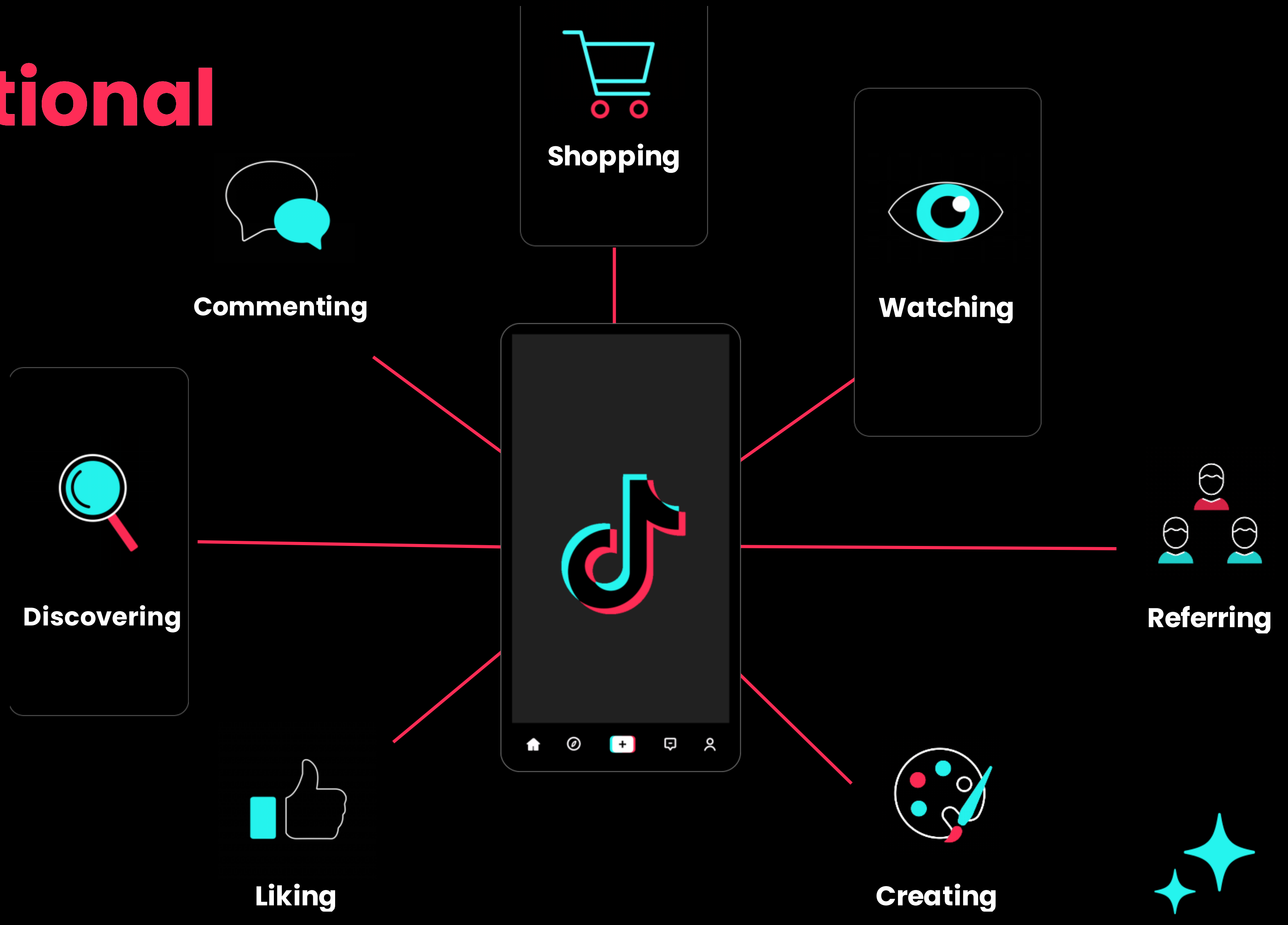
MEDIA REACTIONS 2023

Source: Kantar Media Reactions 2023
1: among global video platforms

Driving intentional audience engagement like no other platform



The unique attention captured on TikTok converts to **impact** for advertisers.

We're helping brands get discovered

95%

of TikTok users are inspired to purchase something via the platform

We're boosting consideration

66%

users influence their communities to make purchases after seeing TikTok content

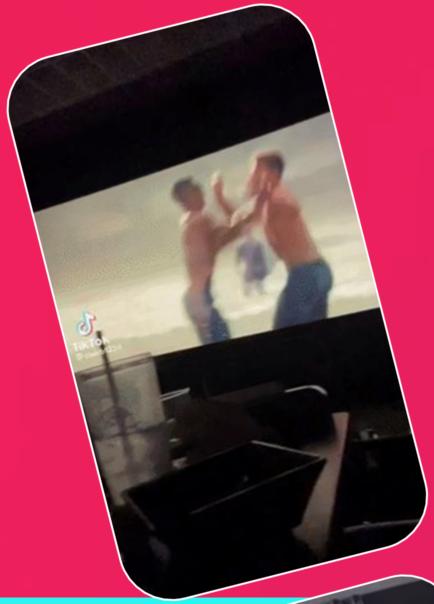
We are driving tangible actions

60%

of TikTok users discover something on the platform and **immediately buy it**[2]

Source: TikTok Marketing Science MENAT, South Africa Holiday Season Report 2023, conducted by Redseer

is the ultimate destination for Entertainment



Built on Discovery

Powered by Community

Driving Culture

We are excited to announce the launch of Future Proof Mzansi. Tune into our marketing podcasts from Kantar in South Africa

Hosted by Stacy Saggers and Senamile Zungu

Episodes released every two weeks. Catch Google's Head of Creative, Artwell Nwaila in our first episode. Get your podcast fix by subscribing to Future Proof Mzansi on your favourite platform: Spotify, Apple Podcast and YouTube

FUTURE PROOF Mzansi

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MZANSI BAROMETER

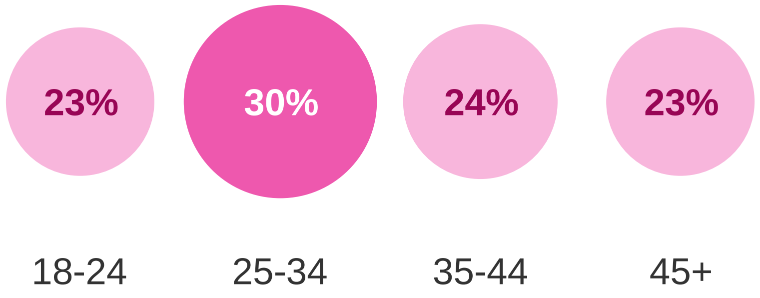
2024

APPENDIX

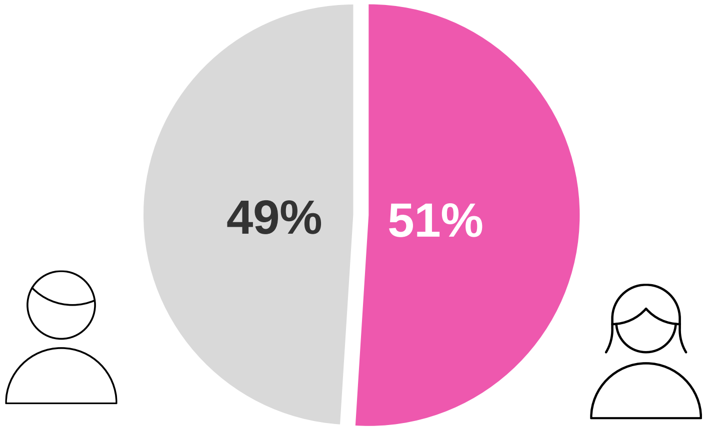
We spoke to 415 South Africans

representative of the connected* population of South Africa

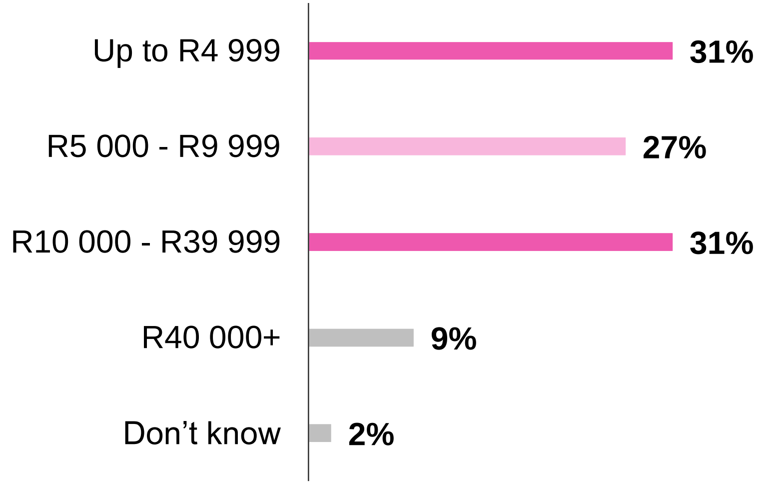
Age



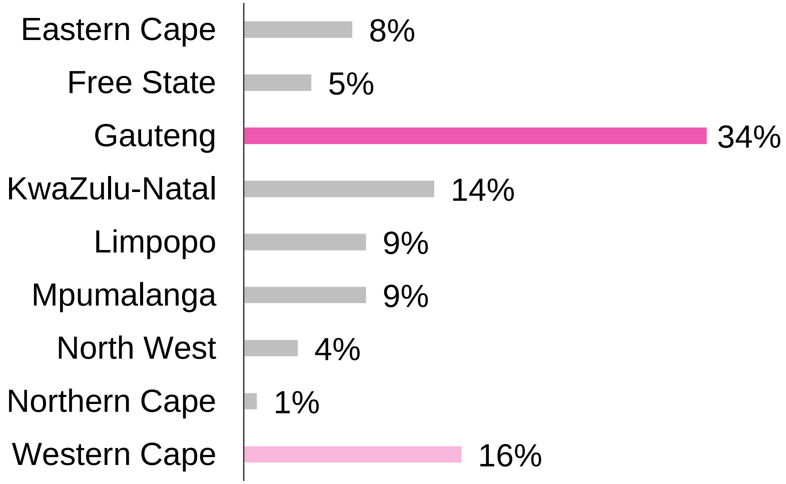
Gender



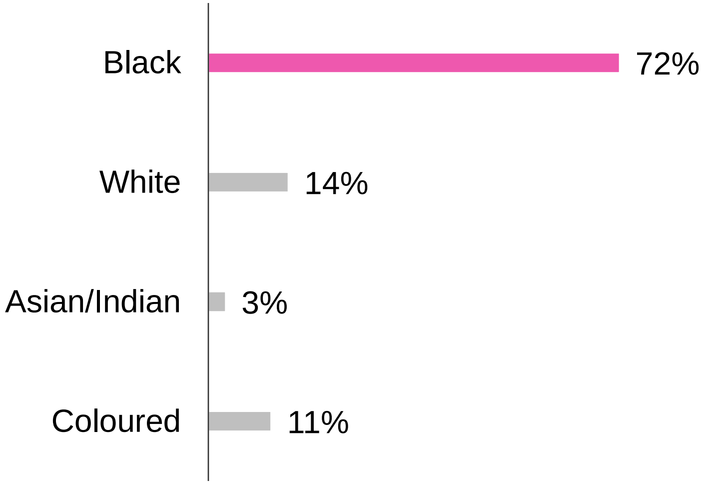
Household income



Region/province



Ethnicity



KANTAR MZANSI BAROMETER

*72% penetration of internet access in SA across home and mobile, MAPS 2022
Base n=415 Total sample connected South Africans, March 24

We also spoke specifically with township dwellers

Sample definition and ring-fencing exercise was a multi-stage exercise, with advice from industry experts and on-the-ground fieldworkers

1. Defining townships

The first step was to determine the definition of a township, appropriate to South Africa today.
To begin, we used a ‘high population locality’ (HPL) definition, and identified Sub Places (SPs) that have a population density of >200 people per square KM. This approach was validated by our expert sampling partner*, who also works with Stats SA.

2. Profiling HPL areas

Next, we profiled the HPL SPs by household income segments, dwelling type and demographics to further refine the SPs.
We also reviewed access to household goods such as landlines, vacuum cleaners and internet at home at an overall SP level to understand the overall SP profile.

3. On-the-ground review

Our face-to-face research field managers then reviewed the list based on their experience of visiting these SPs to confirm if the majority of dwellings within the SP met the definition.

4. Panel profiling and targeting

Kantar’s Profiles panel was aligned with the final list of SPs, to identify panellists who resided in the SPs. Survey invitations were sent out to profiled panellists. The survey included questions around dwelling type, demographics and household goods.

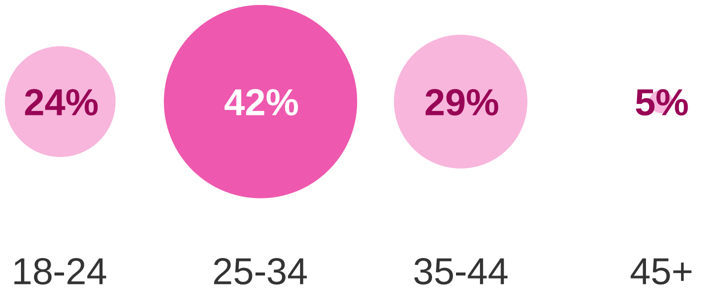
5. Case level exclusion

Respondent-level data was analysed and some cases, those were removed who did not fit the profile of the overall HPL SPs e.g. those with landlines and home security.
Residents of informal dwellings were included regardless of goods ownership.

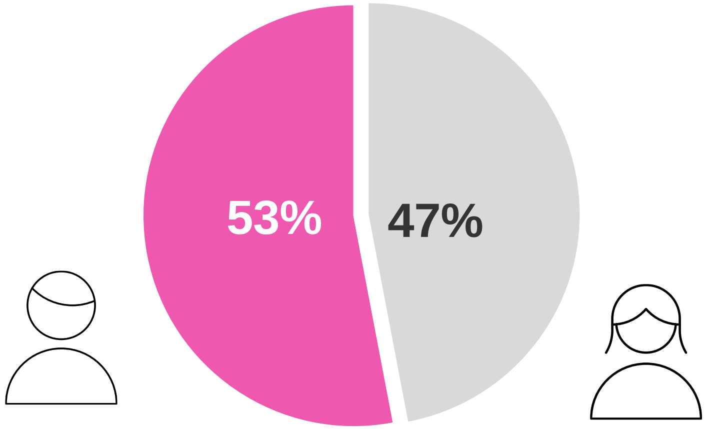
* Sheny Medani (Director: Market Decisions)

We spoke to 85 township-based South Africans

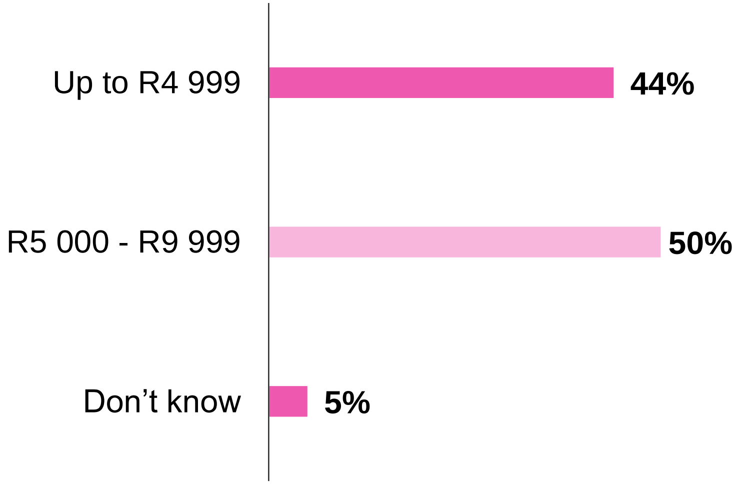
Age



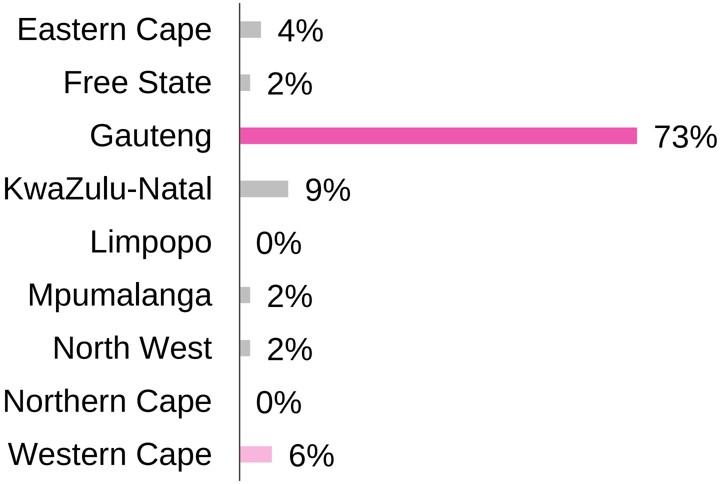
Gender



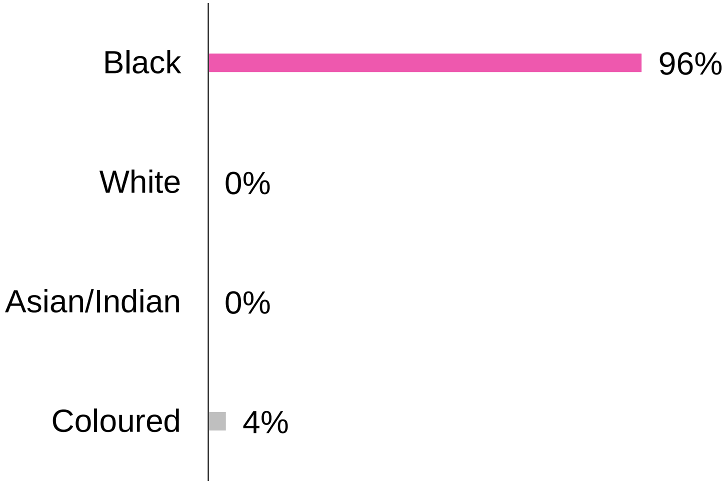
Household income



Region/province



Ethnicity



*72% penetration of internet access in SA across home and mobile, MAPS 2021
Base n=85 Connected South Africans based in townships, April 2024

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2024

Questions? Get in touch with

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