

KANTAR

MZANISI

BAROMETER

2026



Watch the webinar on demand





YOUR SPEAKERS

Stacy Saggors
Commercial Growth Officer
Kantar

Renissa Gounden
Client Partner
Kantar Consulting

The state of our Nation

KANTAR MZANSI BAROMETER



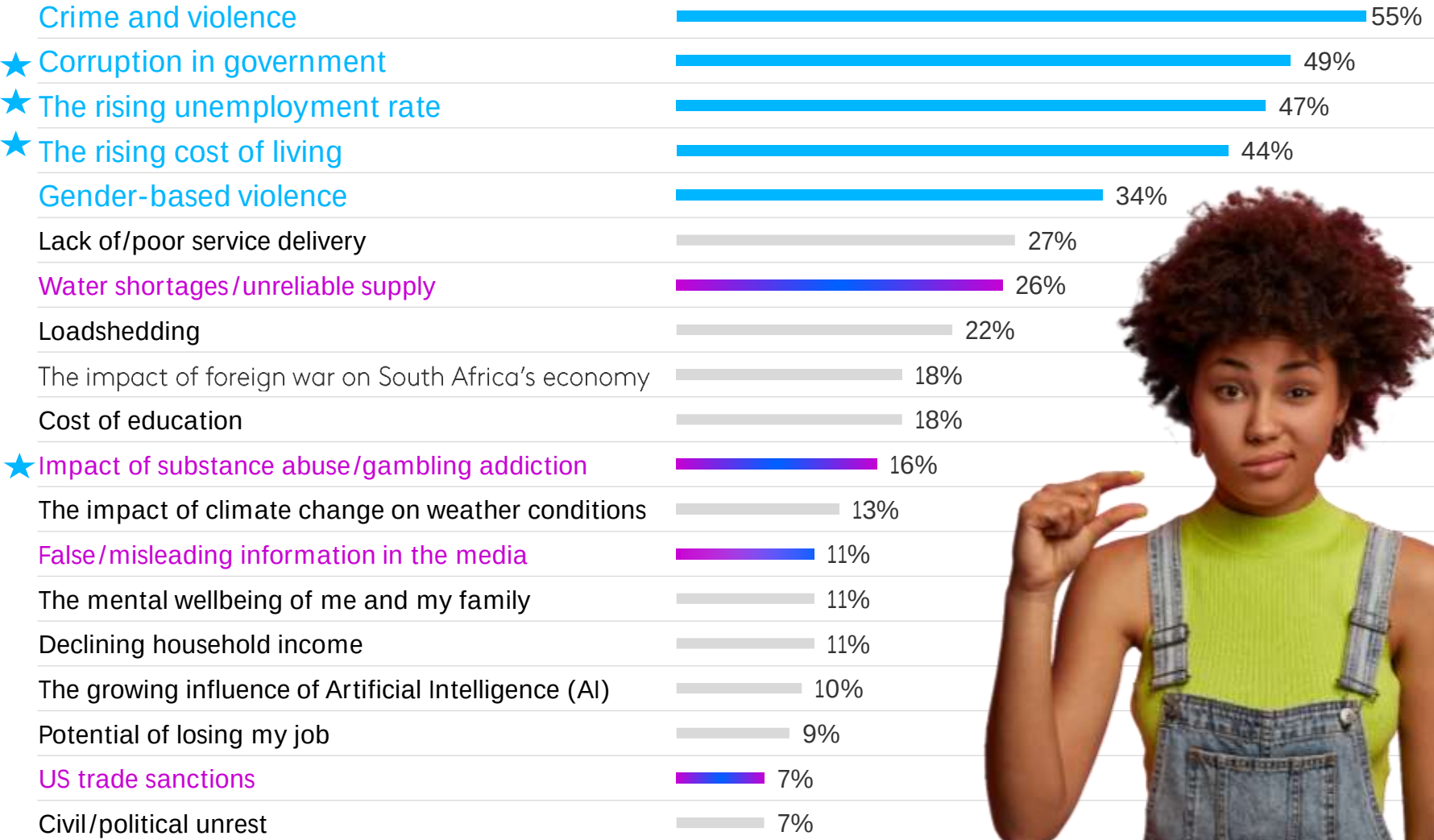
South African concerns remain socio-economic

Crime and violence moves into first position, with water shortage concerns a high new entrant this year

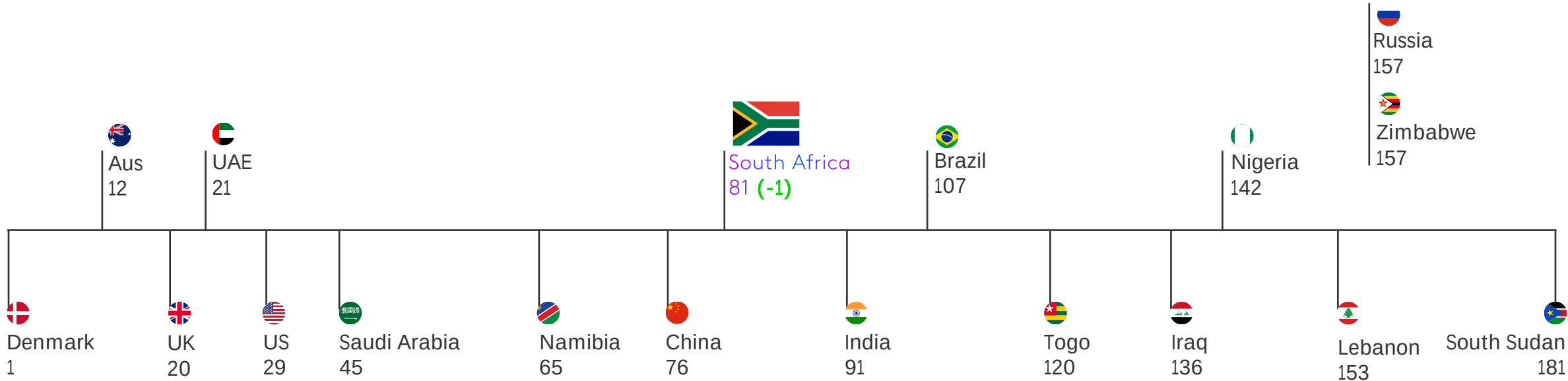
Impact on foreign war moves up from 11% to 18%

Newly added this year

WHAT SOUTH AFRICANS ARE MOST CONCERNED ABOUT IN 2026



As for corruption in South Africa,
The last year has been one plot twist after another



With a high-profile commission and parliamentary investigations, concerns about government corruption is high, even as we maintain mid-level relative to the world.

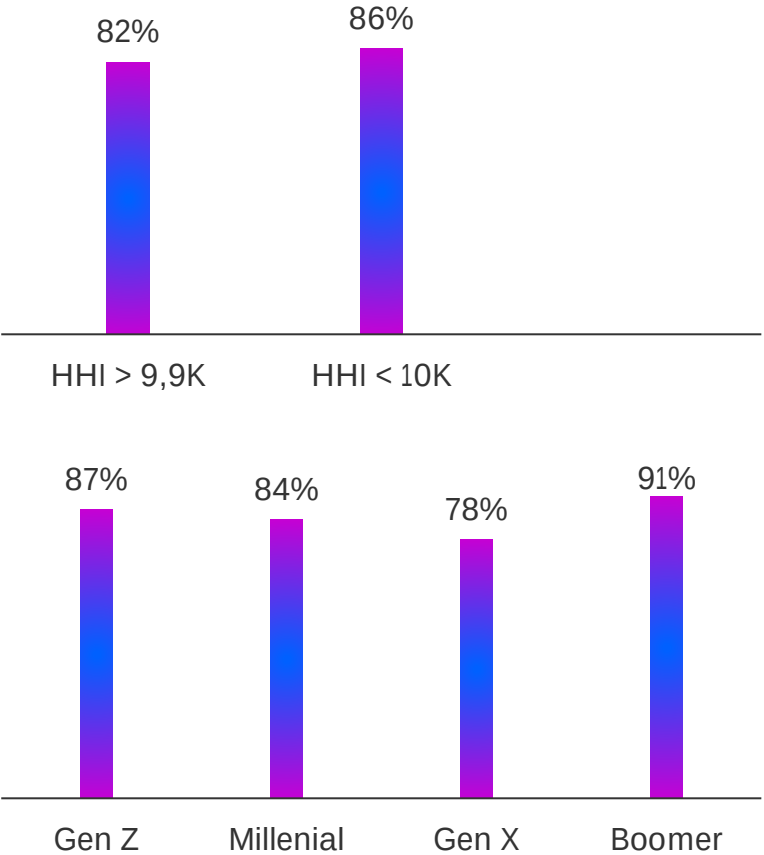
And intentions are high to vote in the upcoming municipal elections, vs large scale apathy in previous years

Social strategies

- DA
- EFF
- ANC
- Rise Mzansi and ActionSA

PLANS TO VOTE IN THE UPCOMING MUNICIPAL GOVERNMENT ELECTIONS

Yes | No



South Africans are struggling to maintain their own businesses, unemployment has increased

Latest official unemployment statistics (Q1 2026):

32.7% (+1.3%)

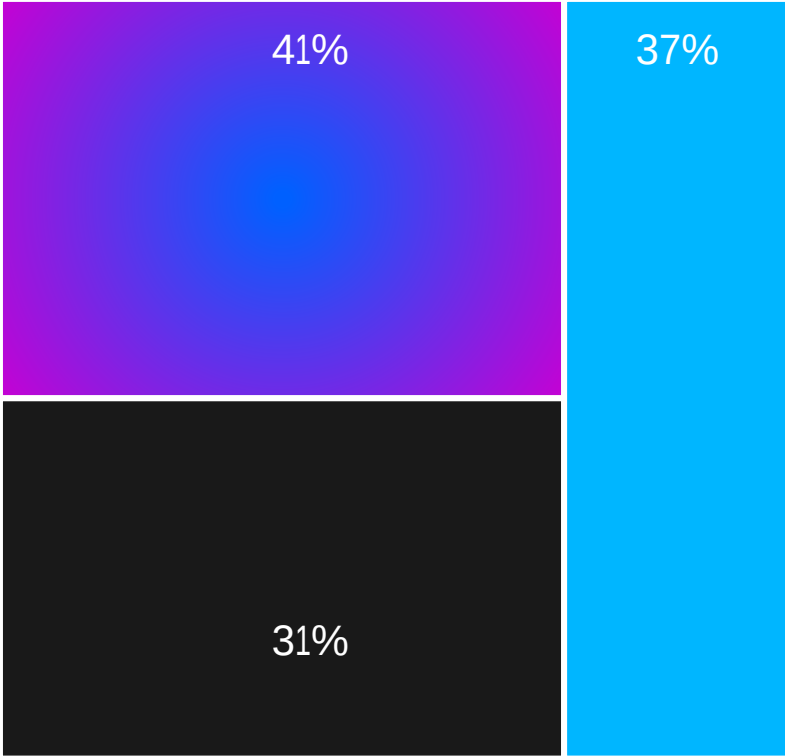
60.9% (Youth, 15-24 YO)

EMPLOYMENT STATUS

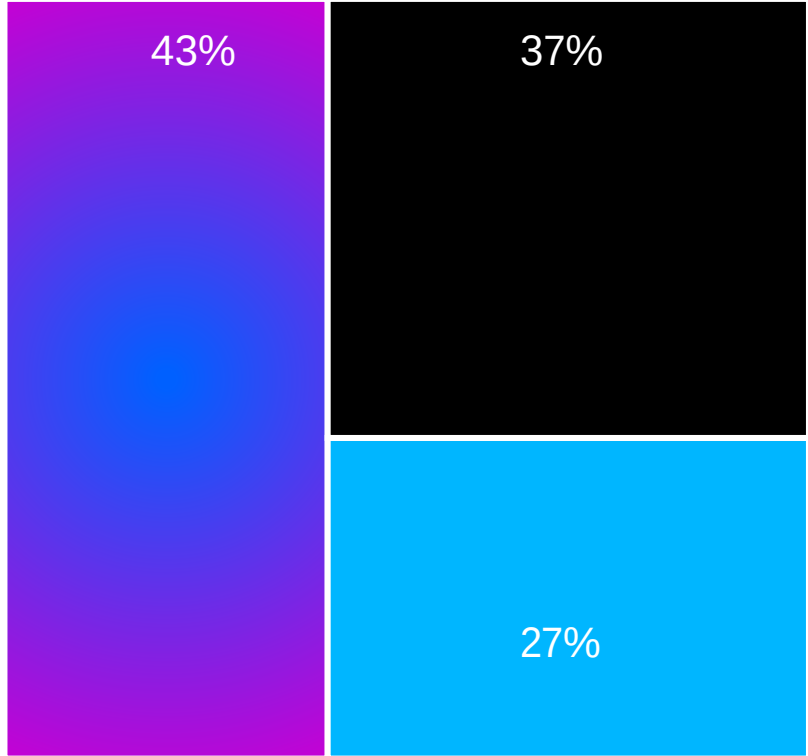
Formal employment with a salary | Own business | Unemployed

**multi-mention question*

2025



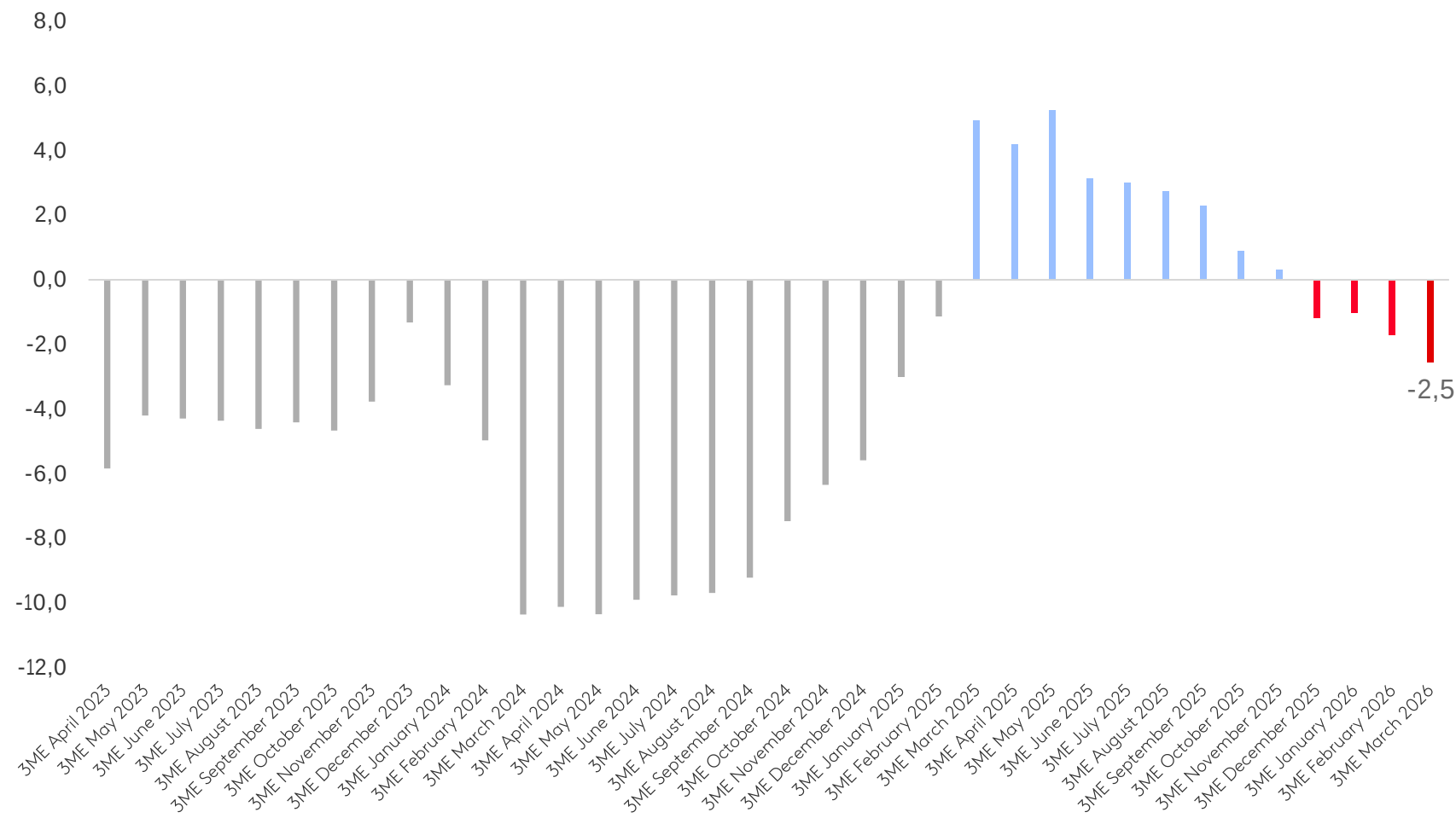
2026



Because household consumption is again in decline, from December 2025



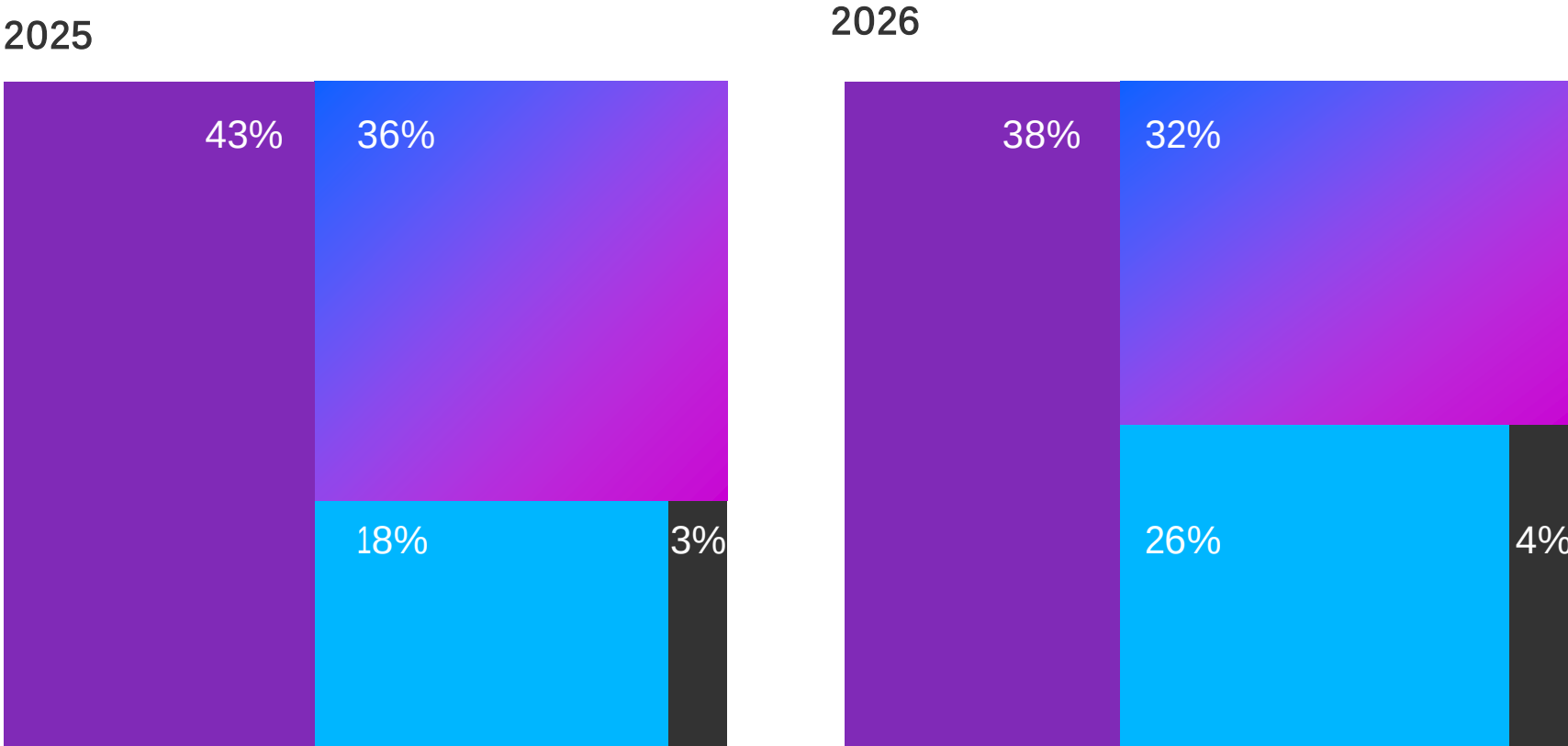
TOTAL FMCG | PACKS PER HOUSEHOLD
% Change vs Year Ago



As the cost of living increases, one third of South Africans are only managing to pay for food, and not covering other expenses

MAPS
Grocery worry: 42% → 47%
58% increase in in consumers taking out loan in P12 months

FINANCIAL SENTIMENT SCALE
Hungry | Only food, nothing else | Just paying it all | Not stressed



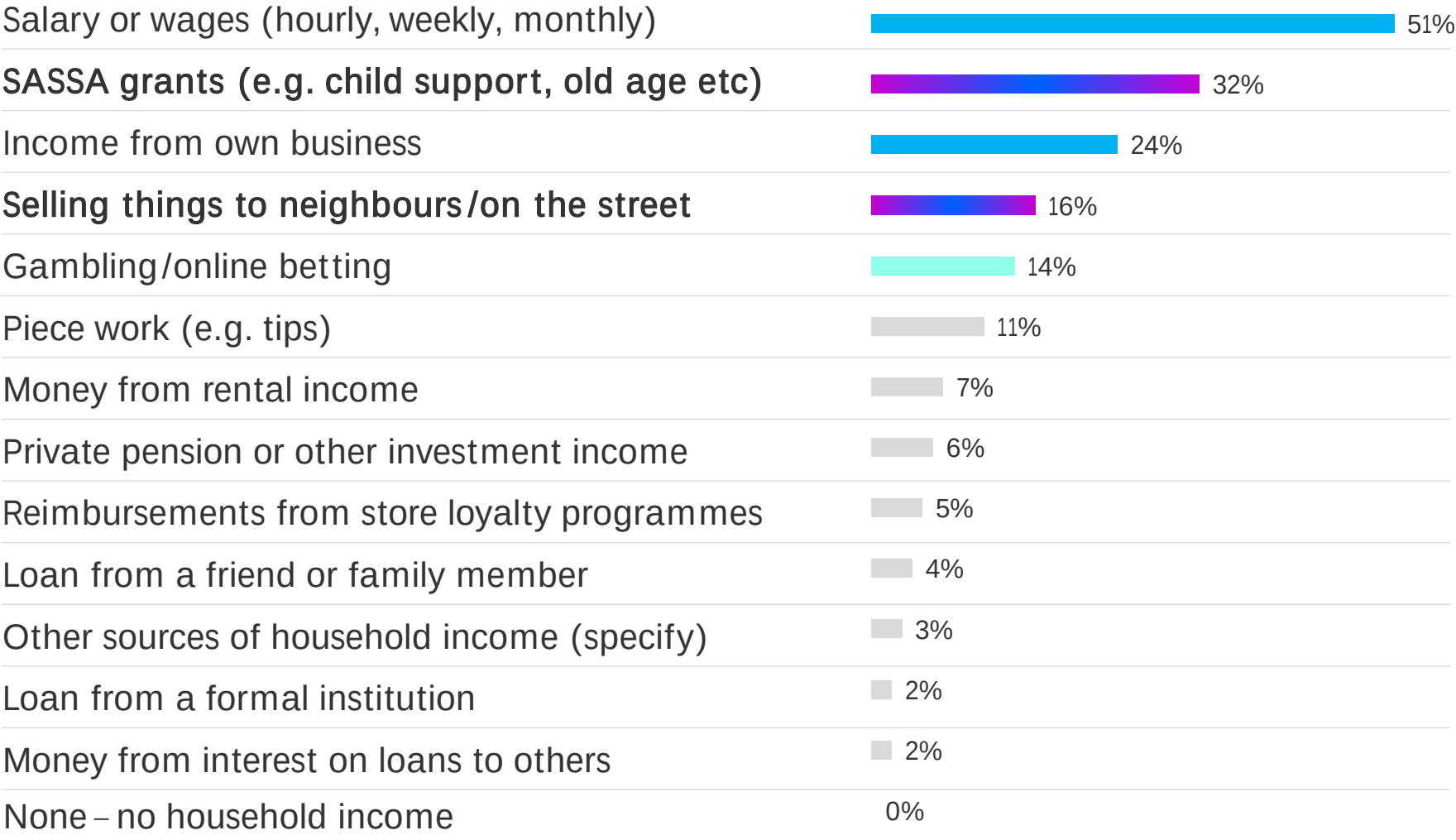
And citing SASSA grants as a source of household income increases from 27% to 32%



MAPS

58% increase in taking out loan in P12 months, Grocery

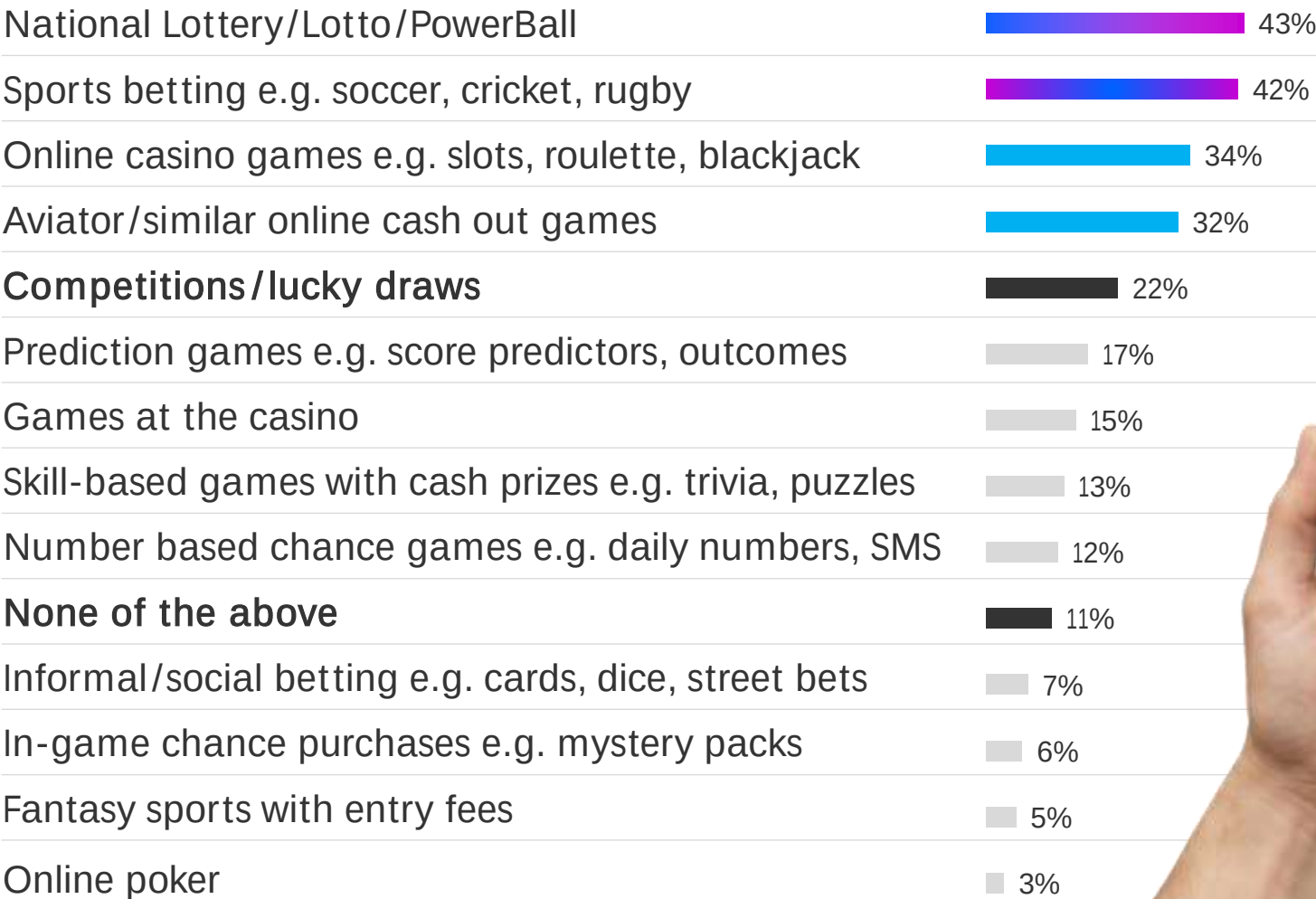
SOURCES OF HOUSEHOLD INCOME



Two thirds of South Africans have participated in some form of gambling

Gambling according to the Oxford Dictionary *“The activity of betting money with an uncertain outcome, with the primary intent of winning money or material goods”.*

GAMBLING PARTICIPATION

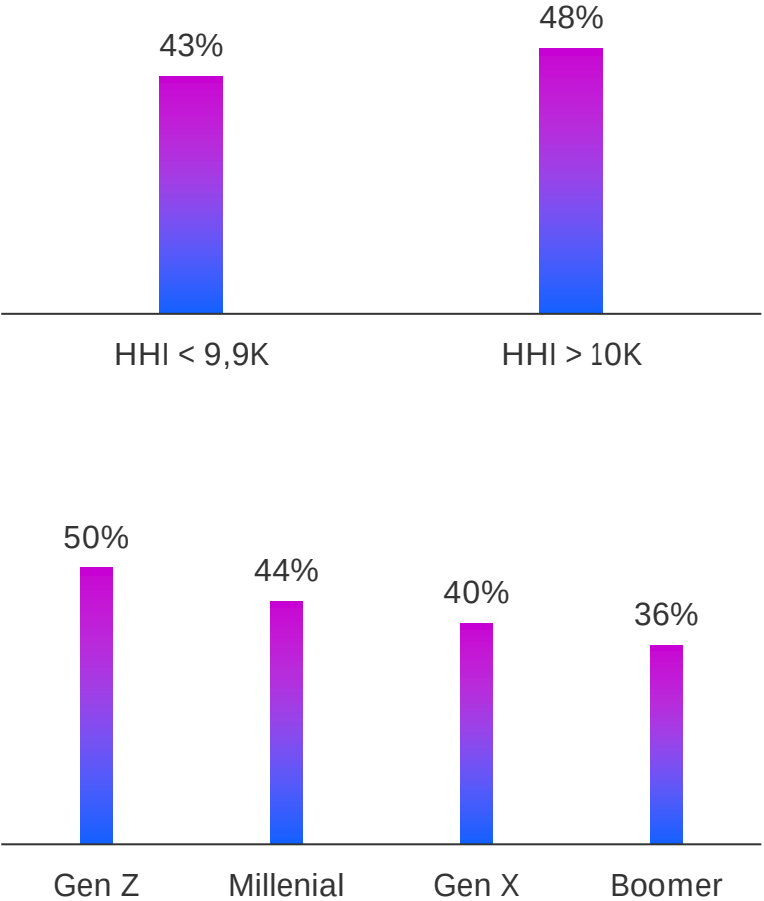
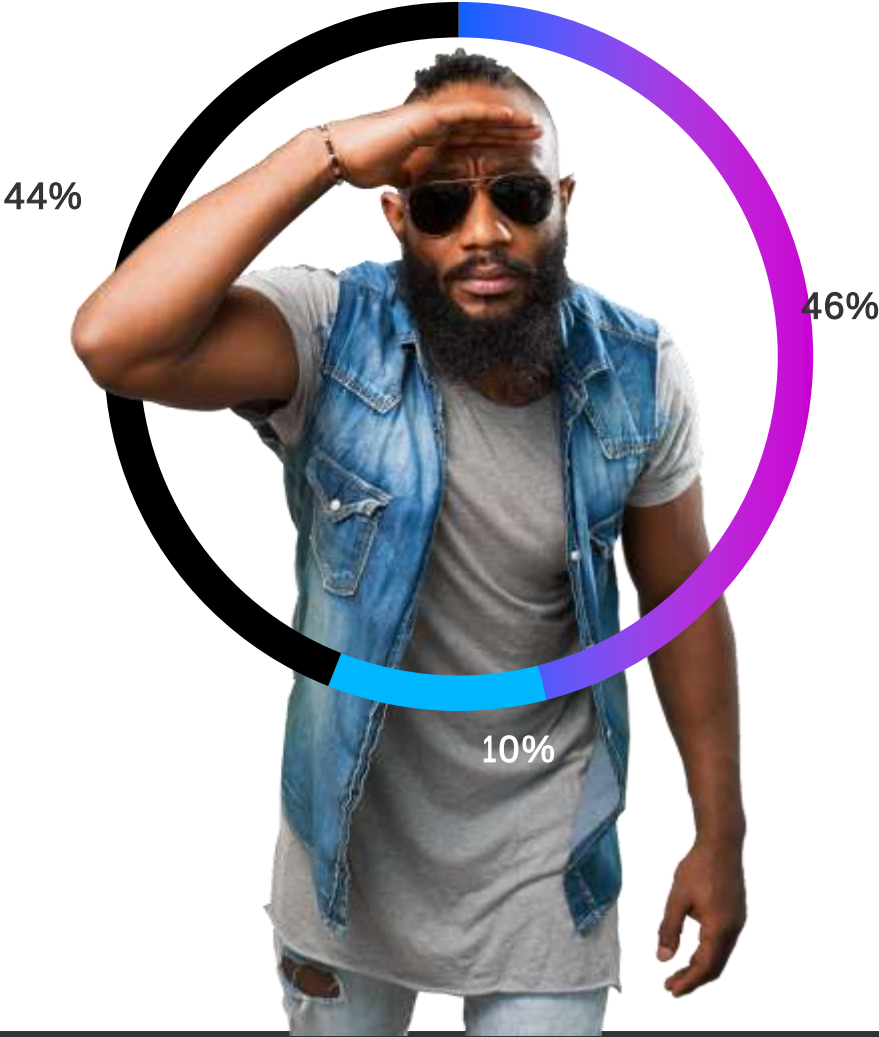


As a result of all these factors, sentiment is changing, increasing concern for the future of our country

And Gen Z's, typically the most optimistic, are also less so, with only 50% citing optimism this year vs 58% in 2025.

COUNTRY OUTLOOK OVER NEXT FIVE YEARS

Things will get better | Things will stay the same | Things will get worse

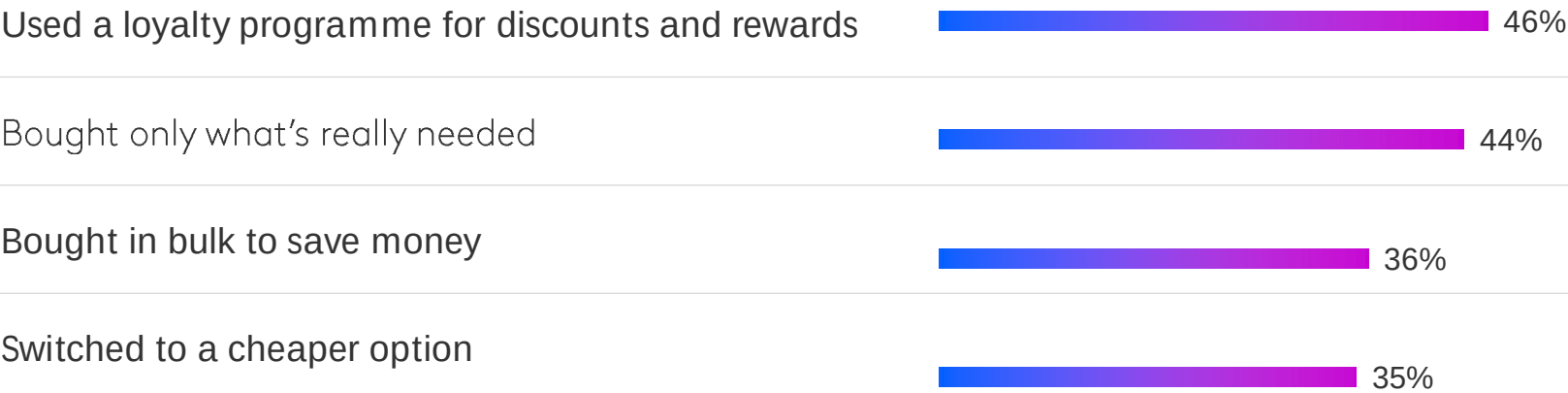


It's giving **restraint**

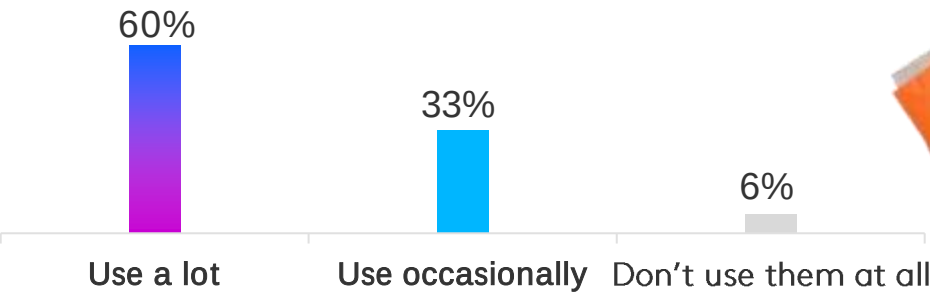


We're finding ways to make our money stretch using four distinct cost-saving behaviours

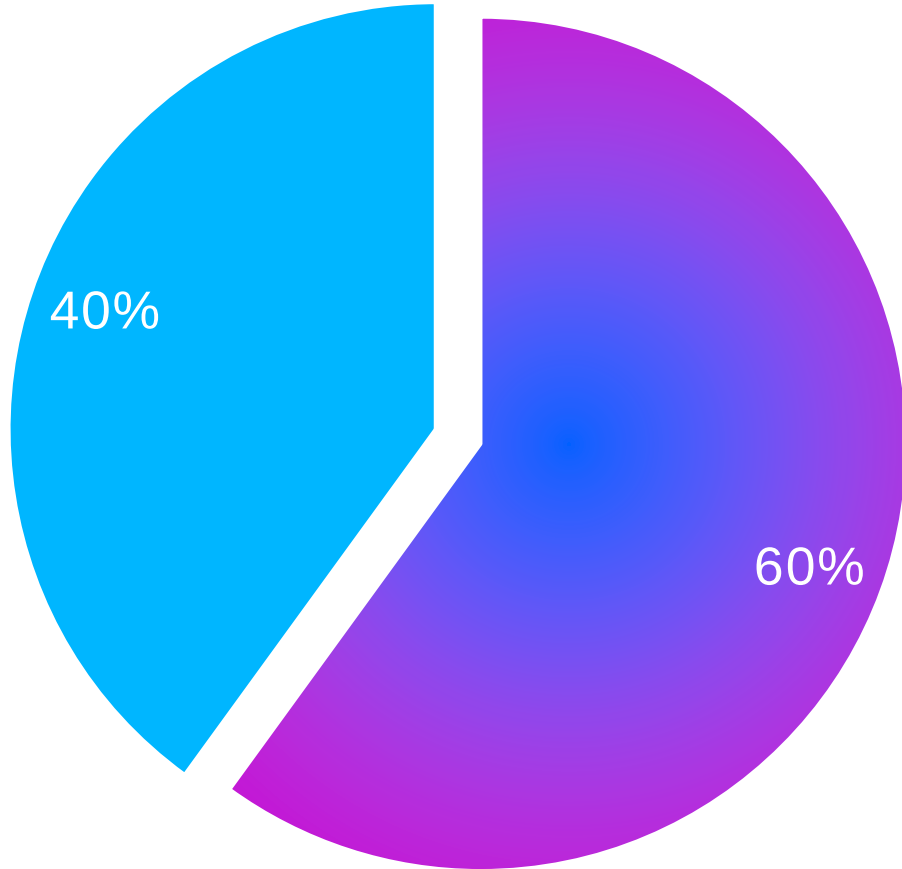
MANAGING MONEY



LOYALTY PROGRAMME USAGE



And, entrepreneurs are coming up with increasingly smart ways to help us get more for our money



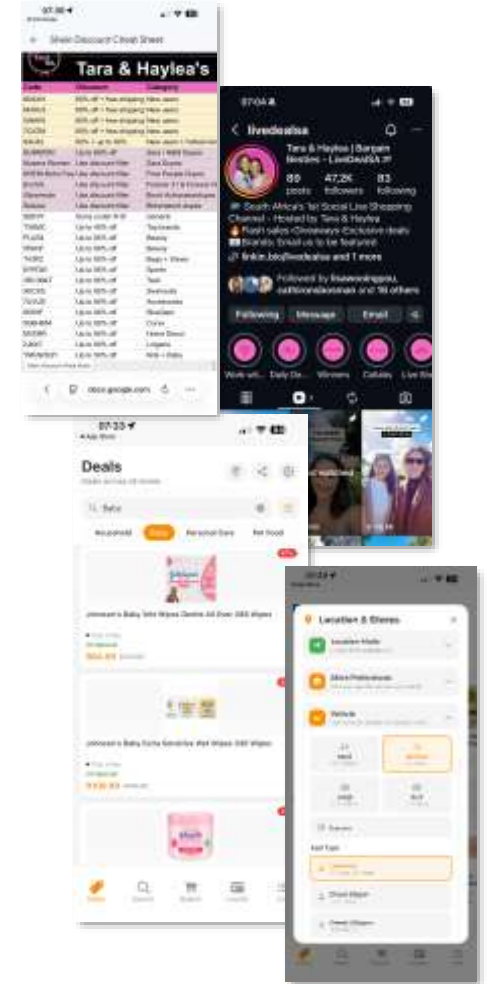
SELF-CLASSIFICATION BY BUSINESS OWNERS

60%
Services

- Rental
- Maintenance
- Building
- Electrical
- Marketing and social media
- Auto repairs
- Nail and hair salon
- IT repairs
- Tech support
- Tech apps

40%
Buying and selling

- Clothes
- Shoes
- Weaves and wigs
- Homeware



Also, we're upskilling to adapt and create our own opportunities

52%

Learning new skills on YouTube



5-day virtual bootcamp offering mentorship and networking

Target audience: SMEs with expansion plans.

Focus on AI: To improve operational efficiency and digital marketing.

Curriculum: Topics include digital strategy, financial management, ecommerce, pitching for success, and AI tool integration.

Impact: Over 15,000 SMEs completed, 80% report revenue growth.



Nedbank have come up with a creative way to engage Gen Z and Gen Alpha where they are, equipping them with entrepreneurial skills.

Gen Z: How to monetise IG, KPI's, Youth X to pursue passions and make a positive impact in their communities.

Gen Alpha: Chow Town game on Roblox to save and start a business, Kairo Forbes.

We need to
differentiate

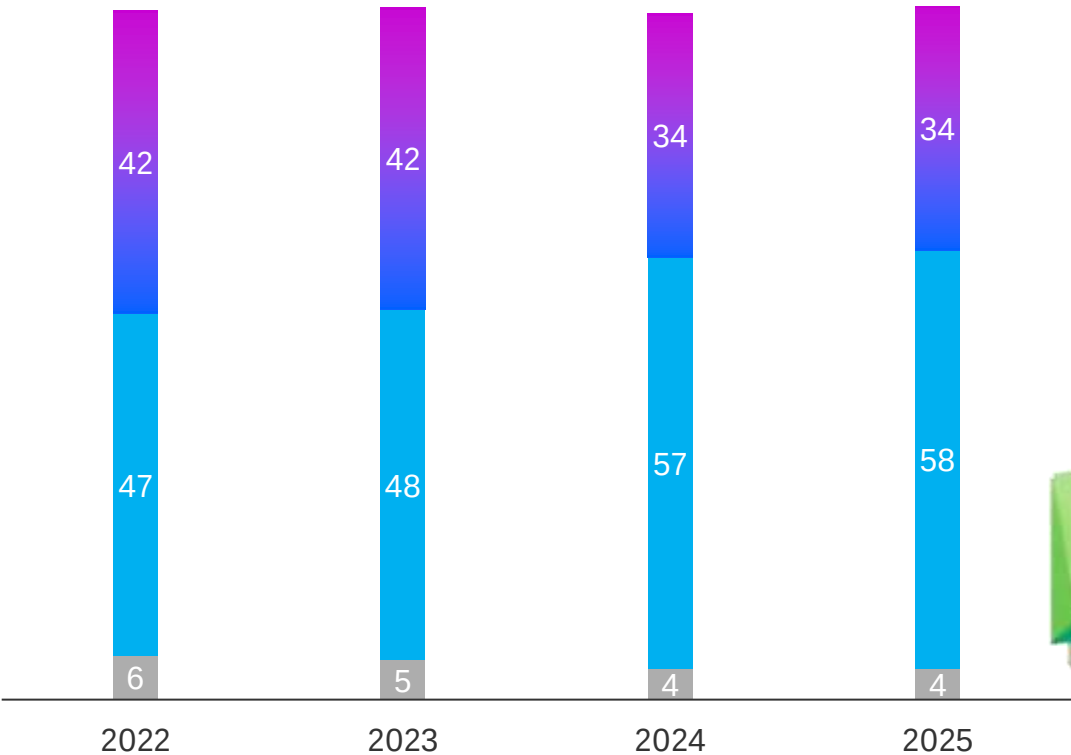


Brand repertoires are increasing over time

- Production and tech
- Retailer brands
- Consideration set: Occasions and uses
- Easy to buy, find and trust

BRAND PURCHASE BEHAVIOUR OVER THE YEARS

Brand loyal | Repertoire buyers | Buy on price



So, brand matters.
And marketers need
to justify that brand
choice over and over
because consumers
are re-choosing it
repeatedly

IMPLICATIONS FOR MARKETERS



1

Easy to buy

2

Easy to find

3

The value
equation

How consumers recalibrate

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Value is earned
when benefits
outweigh sacrifice

$$\text{VALUE} = \frac{\text{BENEFITS}}{\text{COSTS}}$$

And for South Africa, six key benefits create value!



$$\text{VALUE} = \frac{\text{BENEFITS}}{\text{COSTS}}$$

But cost goes far
beyond price...

$$\text{VALUE} = \frac{\text{BENEFITS}}{\text{COSTS}}$$



So what are the
levers that we can
pull to optimise our
value equation?





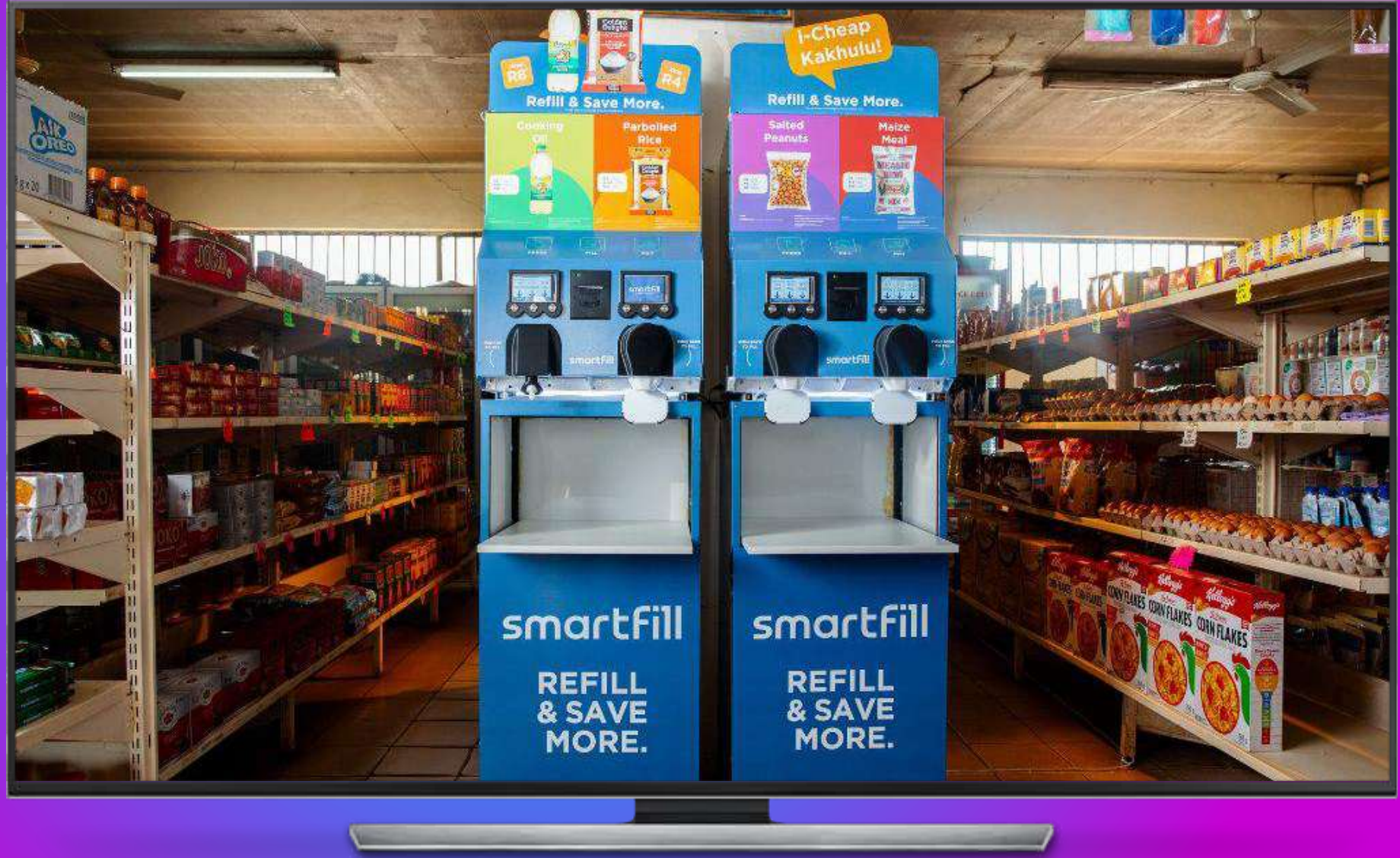
Make savings
feel attainable

Google Pay's Scratch Cards





Engineer
"stretch" value





Remove friction

Send invoices and get paid using WhatsApp **with Nedbank Money Message.**

see money differently

Nedbank Ltd 1951/000009/06 – licensed FSP & registered CP (NCRCP16). T&Cs apply.

WhatsApp Chat Interface:

14:51

Nedbank Money Message

Today

Tap send to get started with Money Message

Hi, Welcome to Money Message, powered by Nedbank – the safe, easy Way to pay and get paid.

Let's get started.

Choose an option below and reply with The code for what you'd like to do.

Gp – get paid
Mp – make payment



Meaningful
trade ups

SUPPERSORTED

Pick n Pay

BURGER FRIDAY

Celebrate the end of the week with our famed Burger Friday deal.

Add a 1.5L Coke Zero/No Sugar Assorted for only R9.99

ONLY 1 DEAL PER CUSTOMER

SAVE R100
**ALL 5
R60**
SWIPE IT

FNB clients with Smart Shopper Card

SAVE R50
**ALL 5
R110**
SWIPE IT

Smart Shopper Price

Coca-Cola
ZERO SUGAR

Terms and Conditions: R110 deal only valid when swiping your registered Smart Shopper Card. (limits apply). To qualify for the R60 deal, you need to be a registered Smart Shopper with an active FNB account. (only 1 deal per customer). Only available in-store at Pick n Pay Supercenters and Hypermarkets. While stocks last. Products have been styled for photography. Valid until 29 August 2025. *Fanta, Sprite or Stoney Ginger Beer Original, Coca-Cola Zero Sugar, No Sugar No Caffeine or Stoney Ginger Beer No Sugar Carbonated Soft Drink 1.5 Liters. See online terms and conditions for full list of participating soft drinks.



Protect the
household
wellbeing

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Fill in your details and we'll call you back.

Name*

Surname*

Cell Number*

But cost goes far
beyond price...

$$\text{VALUE} = \frac{\text{BENEFITS}}{\text{COSTS}}$$



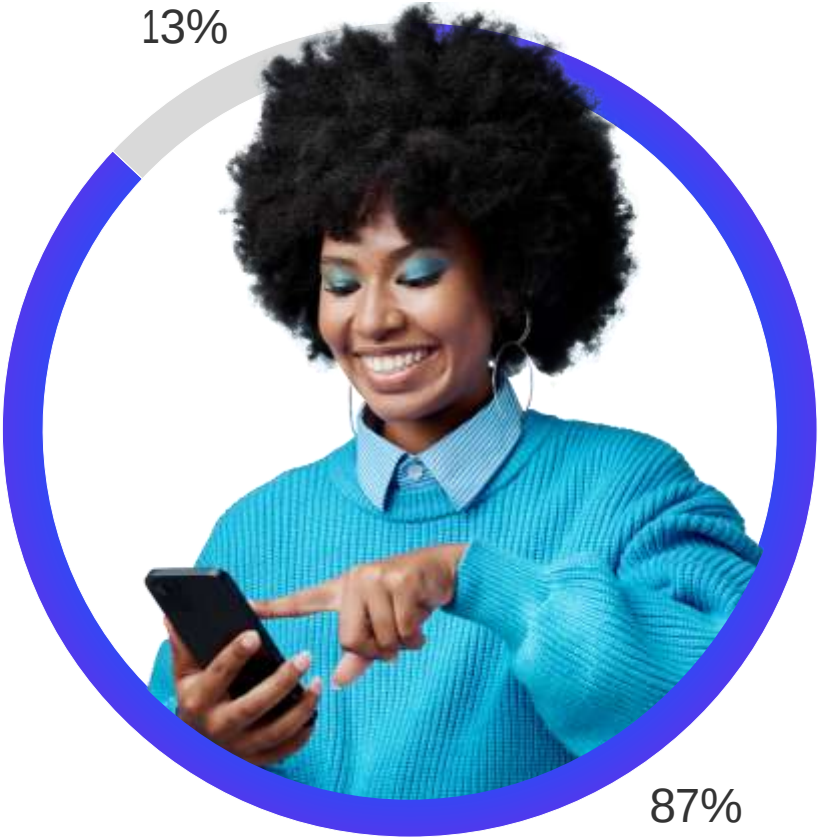
South Africans navigate online

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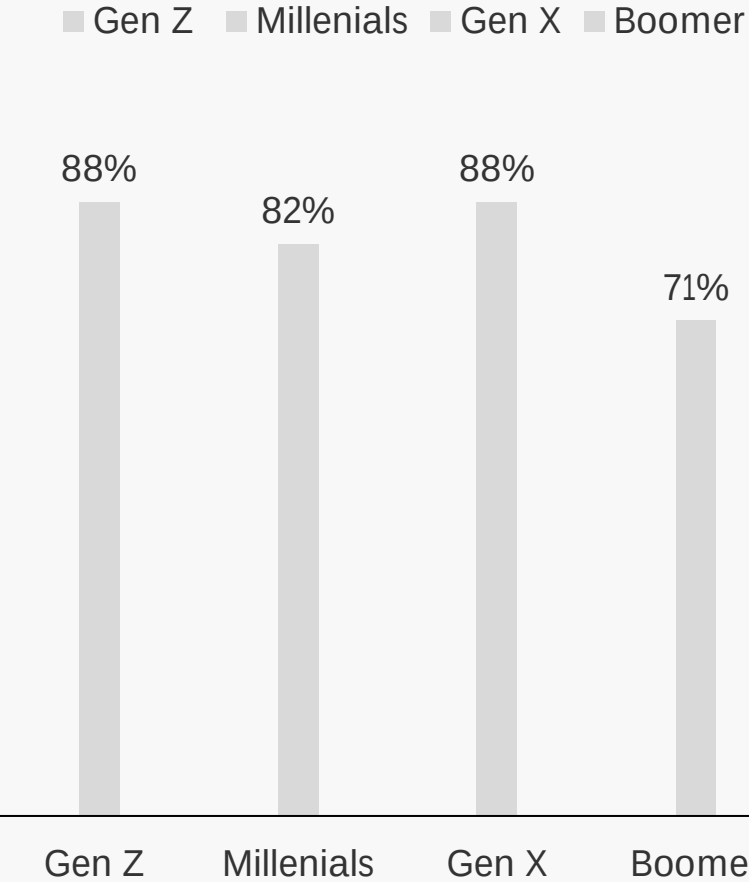
Reduction in shopping online vs previous year as the need for control increases

ONLINE SHOPPING
Ever shopped online | Don't shop online



Ever shopped down from 94% in 2025

EVER SHOPPED ONLINE



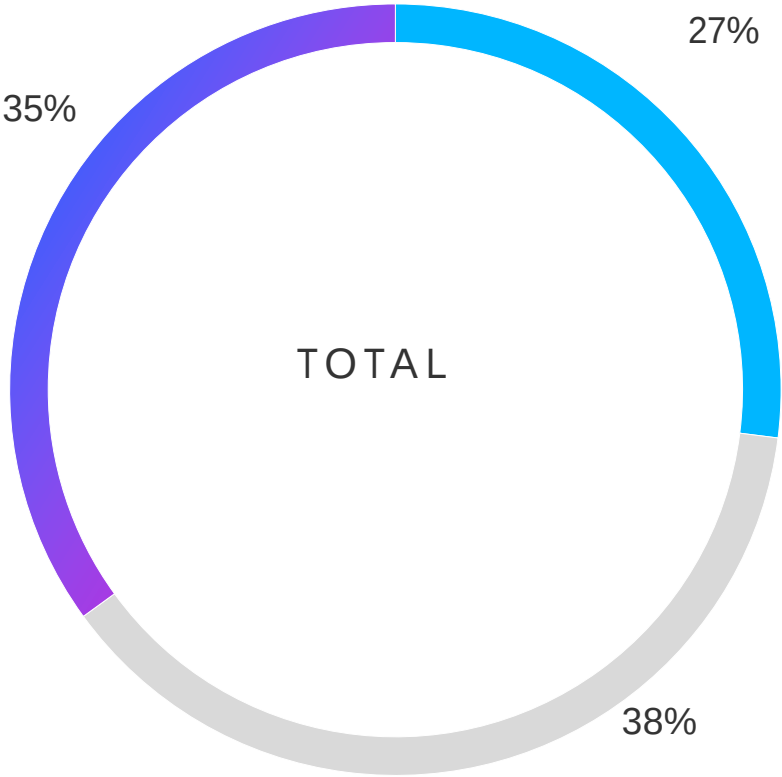
Slight trend for online shoppers to be spending more money in-store this year vs last year

Two thirds shopped Black Friday last year.

Shoppers: Big ticket, Everyday, Stokvel, Fashion

TOTAL SA: CHANNELS SHOPPED

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

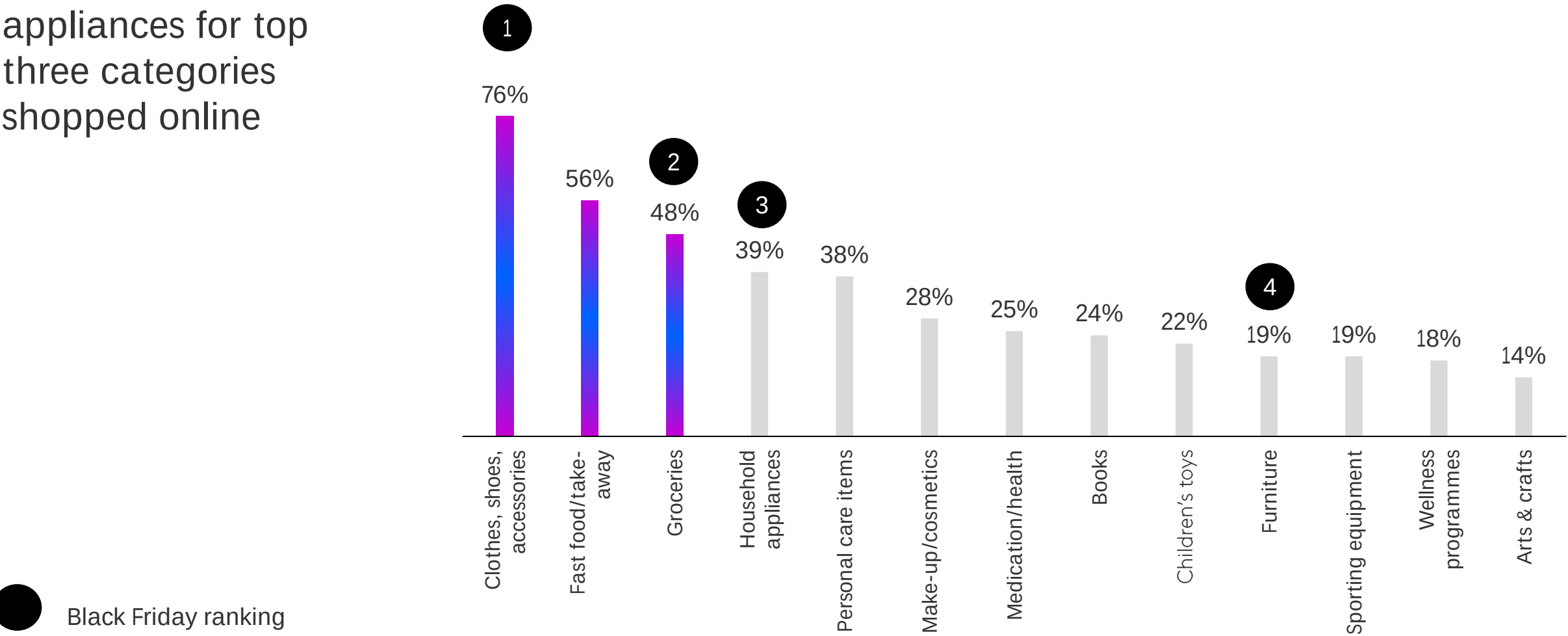


BLACK FRIDAY: CHANNELS SHOPPED



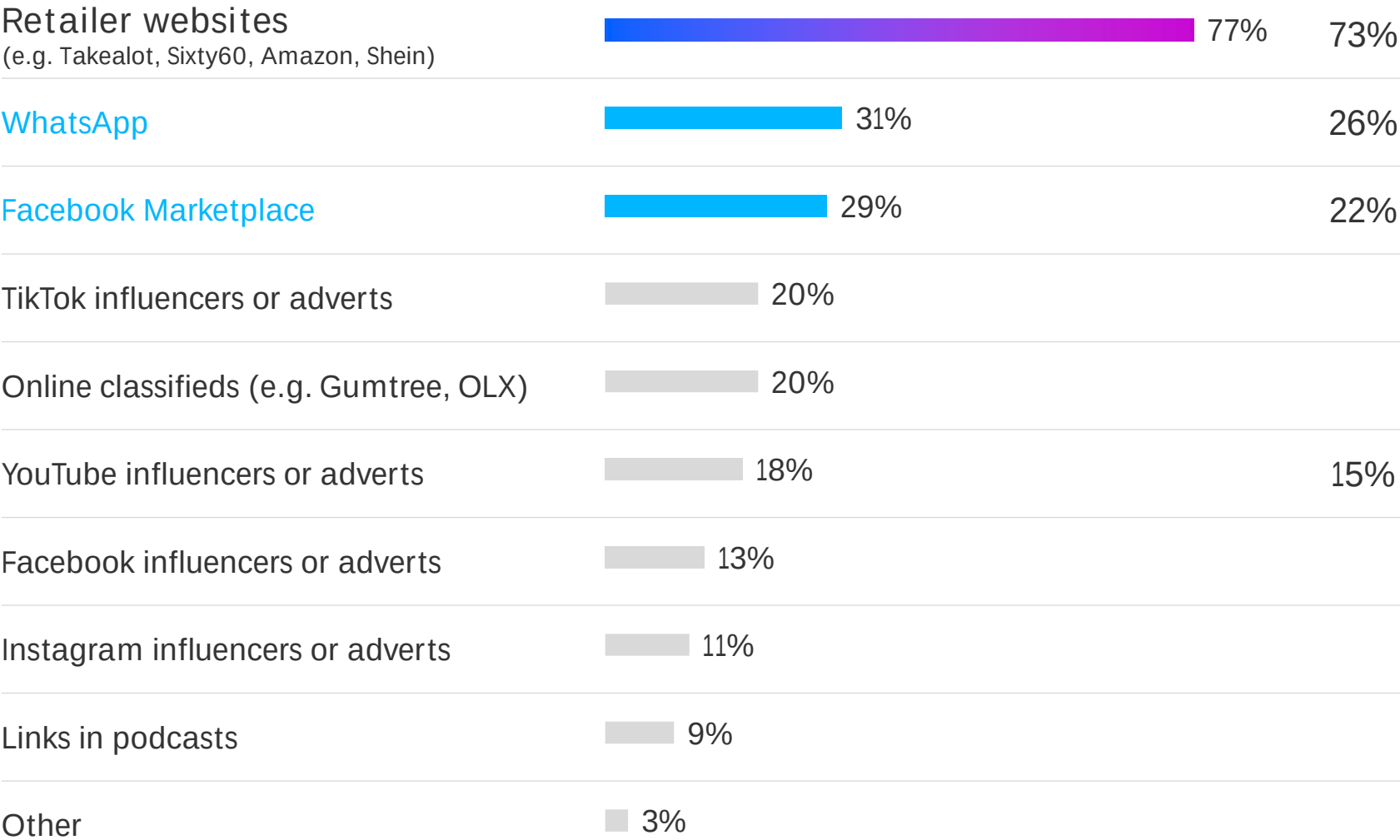
Groceries has overtaken household appliances for top three categories shopped online

CATEGORIES SHOPPED ONLINE



Use of retailer websites, WhatsApp and Facebook Marketplace are up

ONLINE PLATFORMS



“Buy now” chaos → distinctive brand assets and brand linkage.

Use of AI accelerates

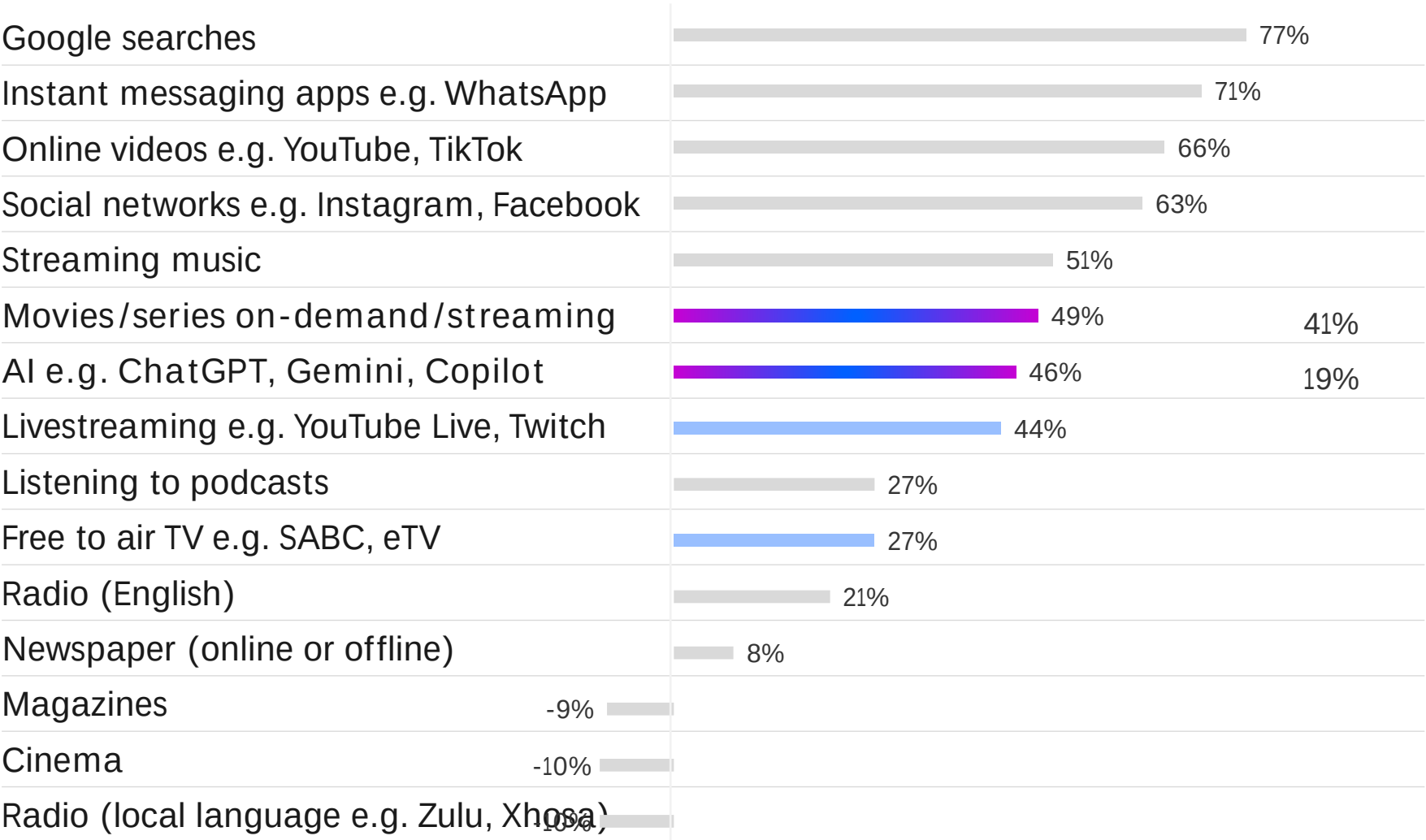
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High increase in nett growth of AI and streaming shows

All other media channel consumption remains similar to last year.

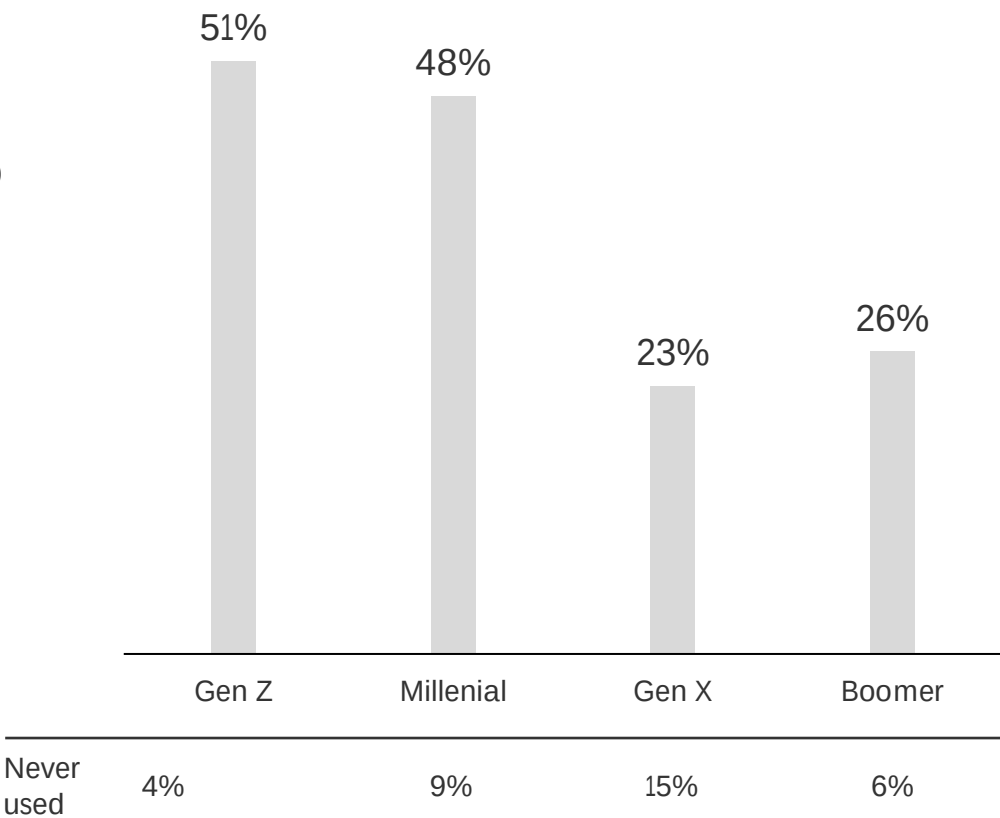
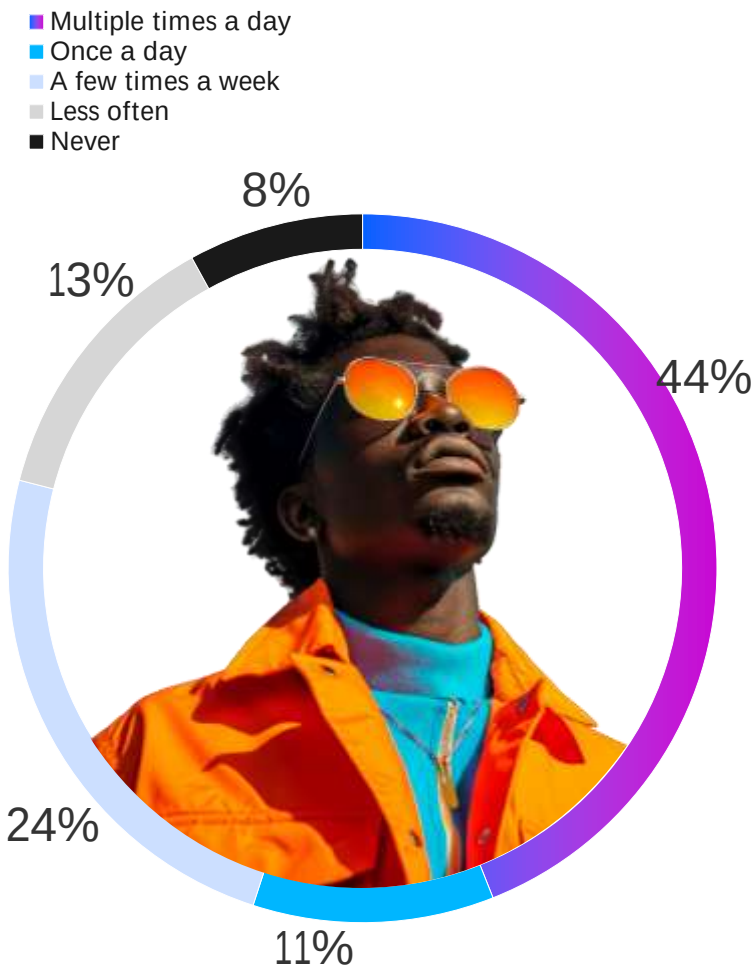
NETT INCREASE IN USE OF MEDIA CHANNELS



Half of connected South Africa is using AI daily, only 8% are not using it at all

Half of Gen Z and Millenials are using AI multiple times a day.

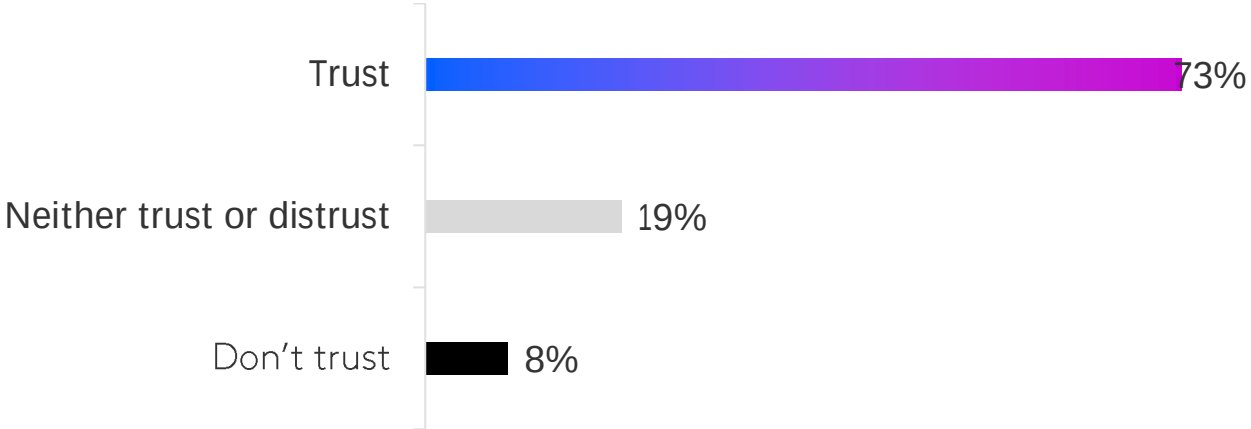
AI FAMILIARITY AND FREQUENCY



Three quarters trust the information and advice that AI generates

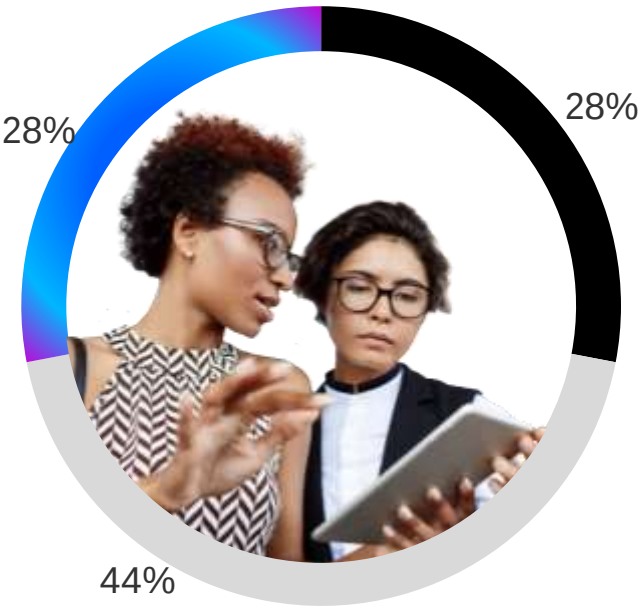
A third do not fact check at all

TRUST IN AI

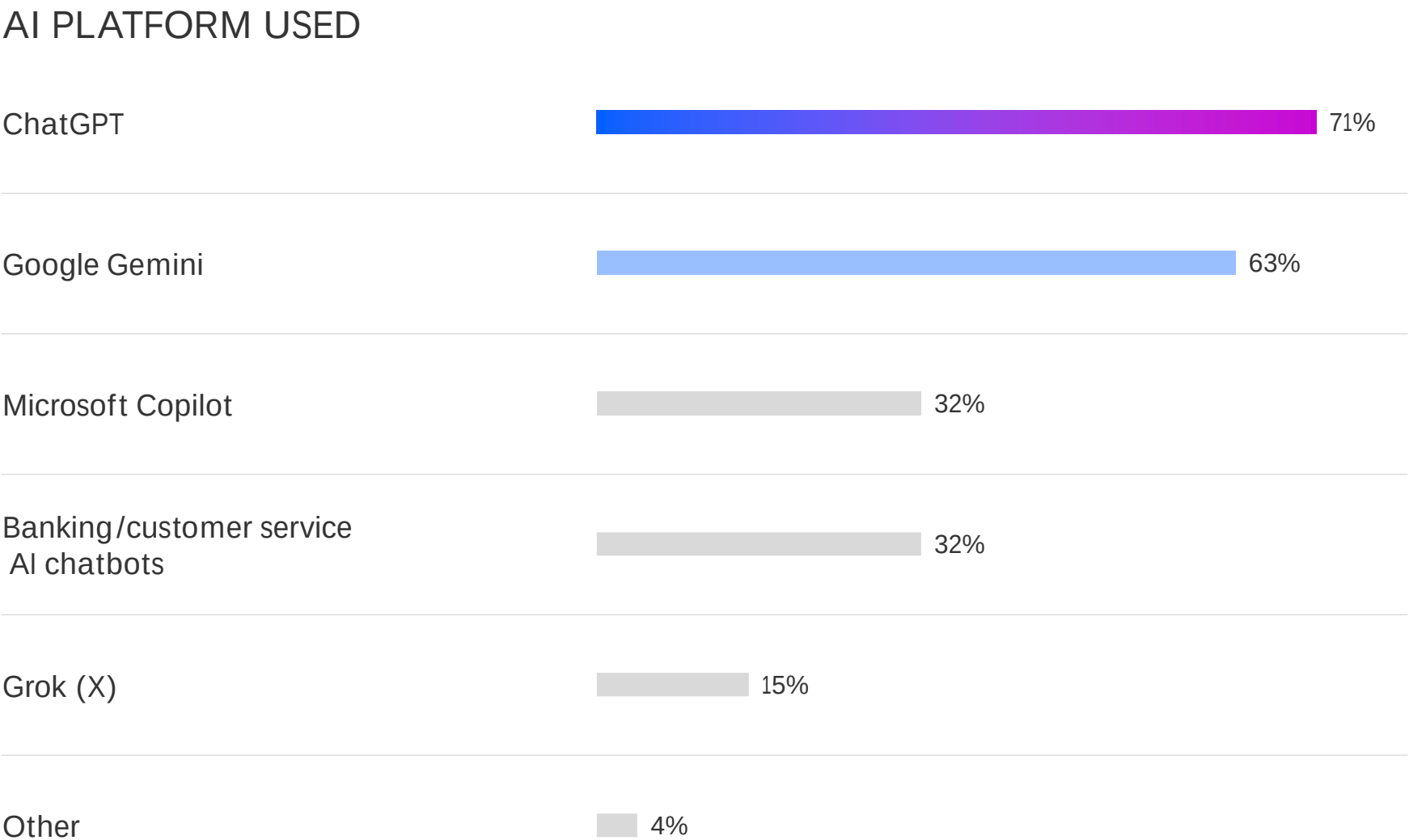


AI FACT-CHECKING

- No
- Sometimes
- Yes

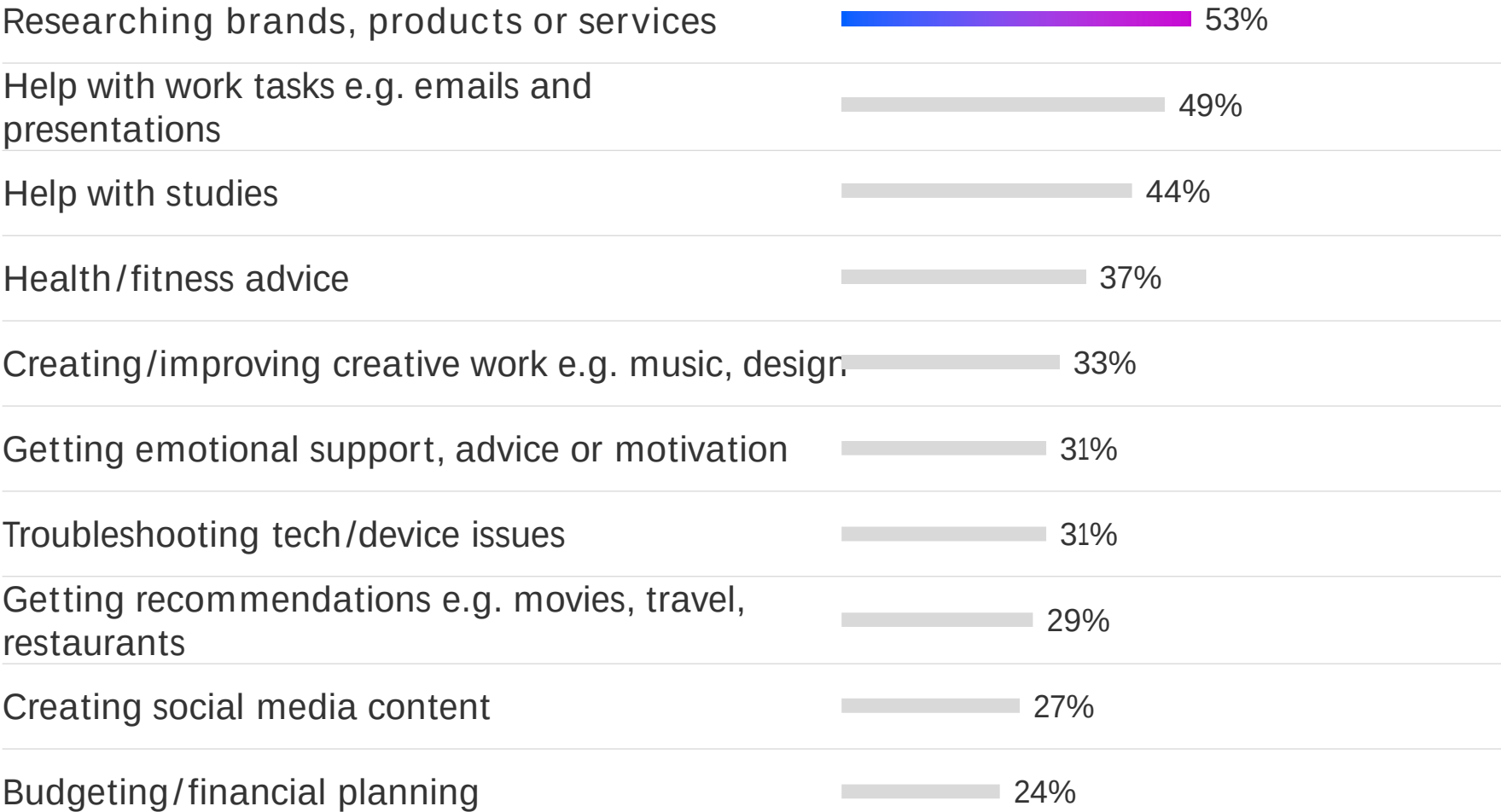


ChatGPT and Gemini dominate as platforms used



The main reason we are using AI is to research brands, products and services

WAYS WE ARE USING AI



How can brands
recalibrate?





1 UNDERSTAND

Financial pressure is reshaping identity, not just behaviour

2 HELP

Value is a system, not a price point

3 PIVOT

Consumers are building their own brand intelligence



QUESTIONS?

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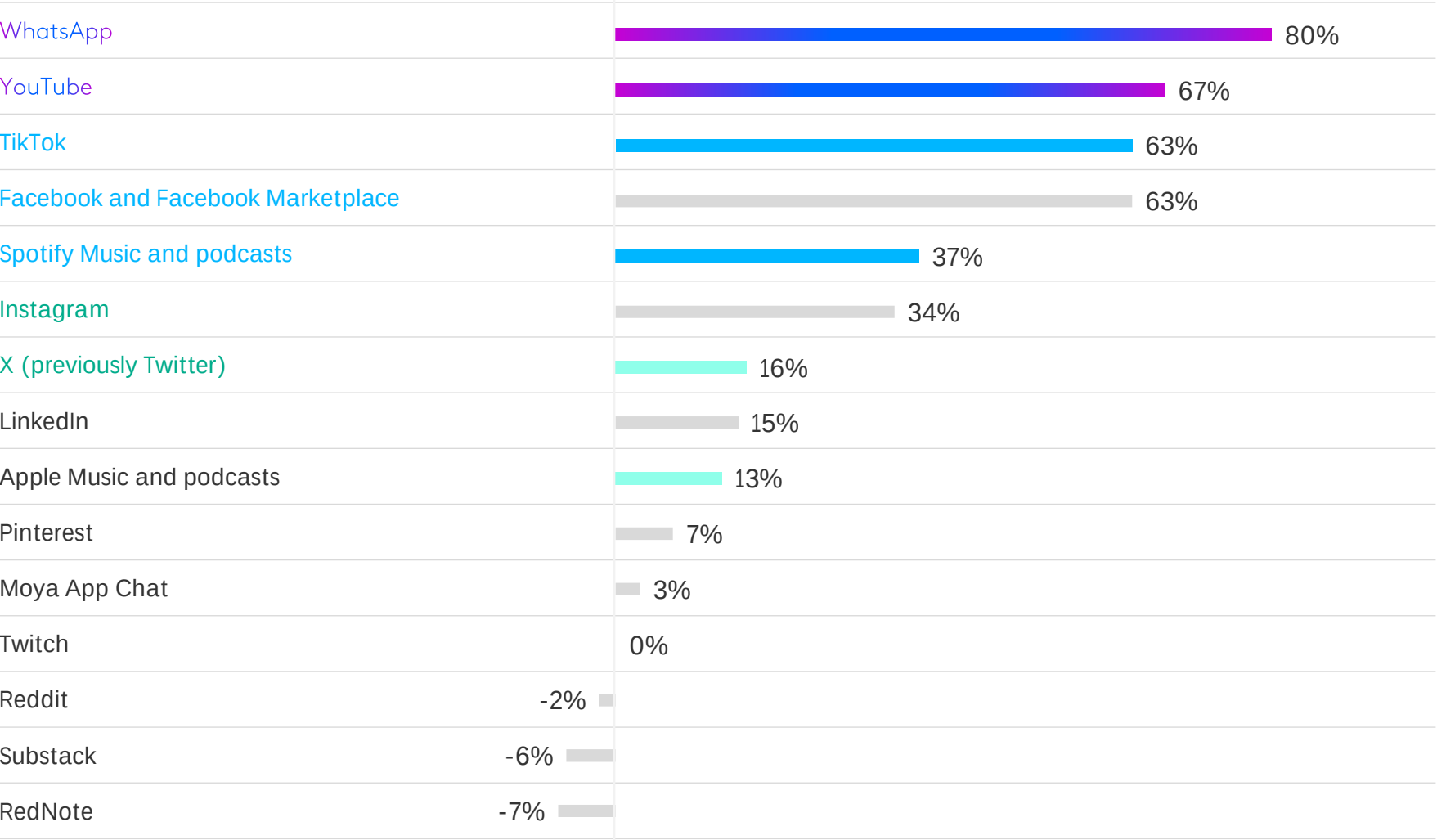
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Appendix

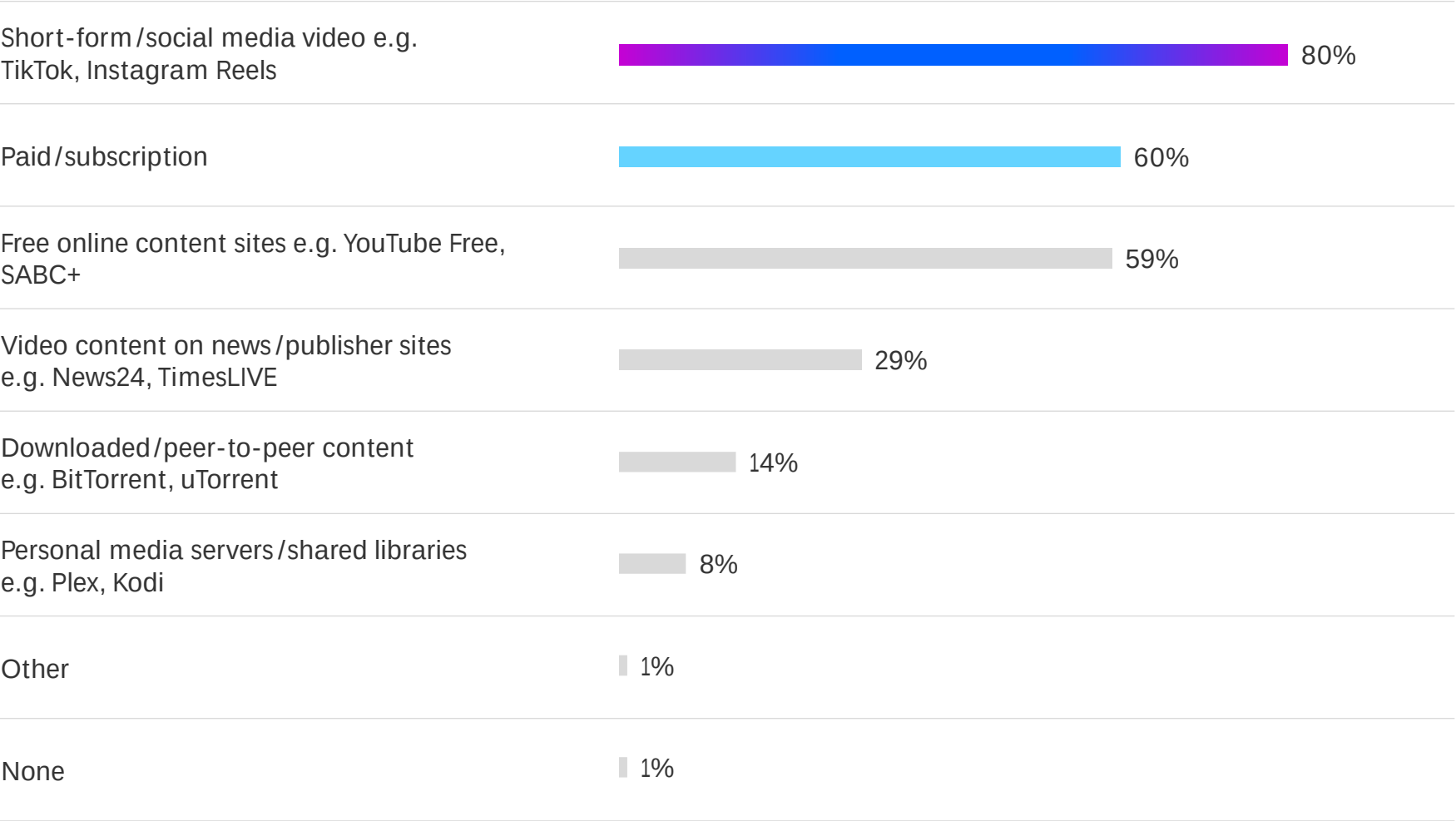
Very similar y-o-y growth to 2025

NETT INCREASE IN USE OF MEDIA BRANDS



Short form
dominates

TV/VIDEO CONTENT ACCESS

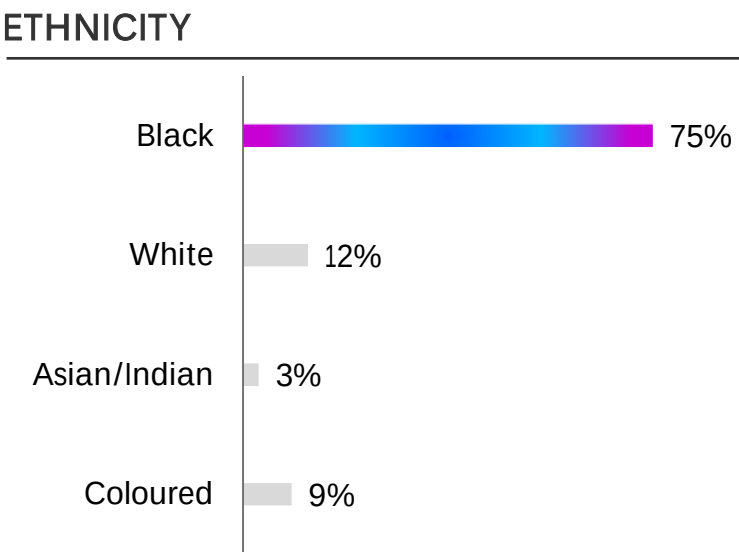
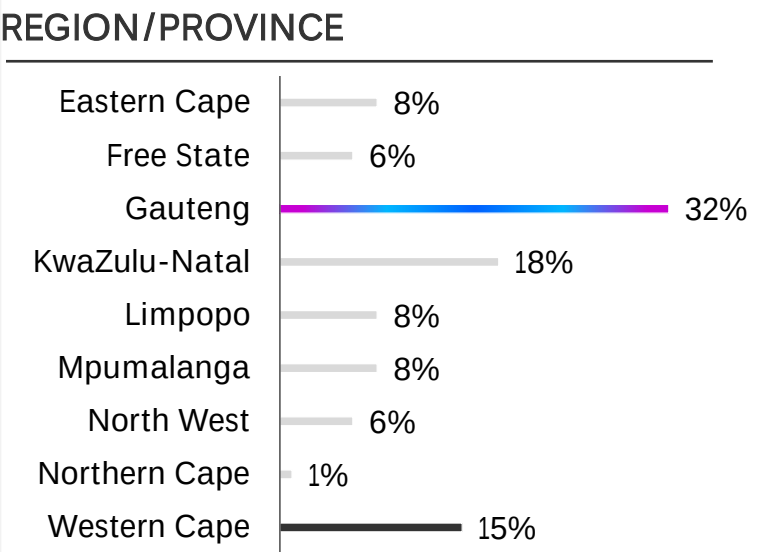
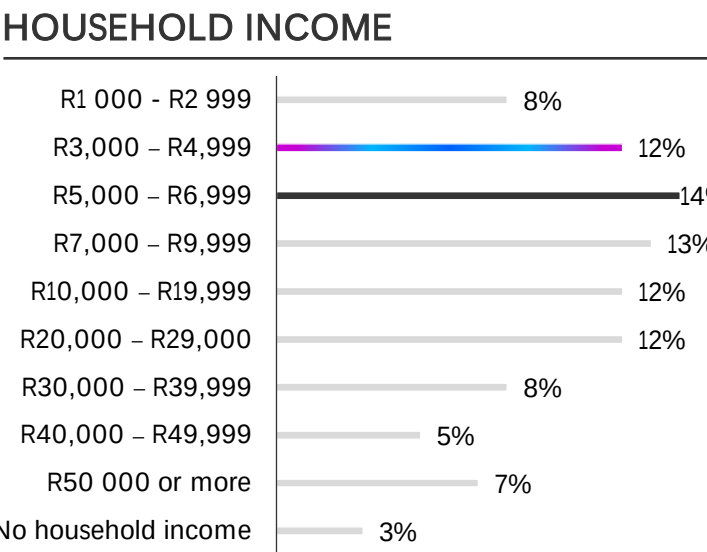
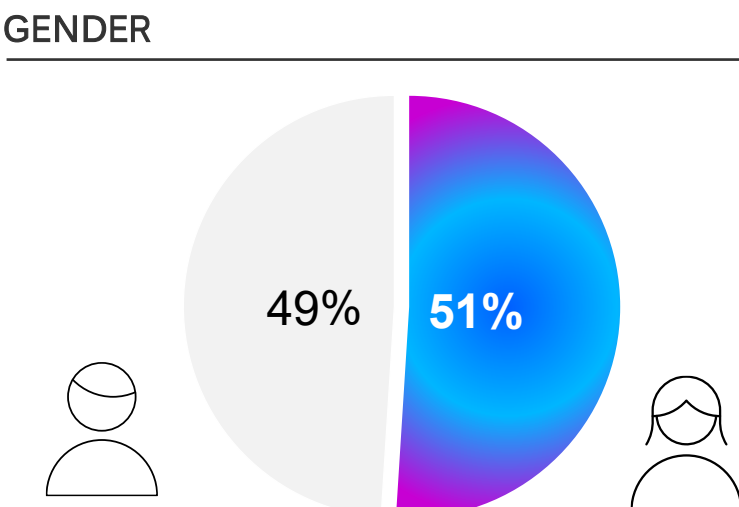
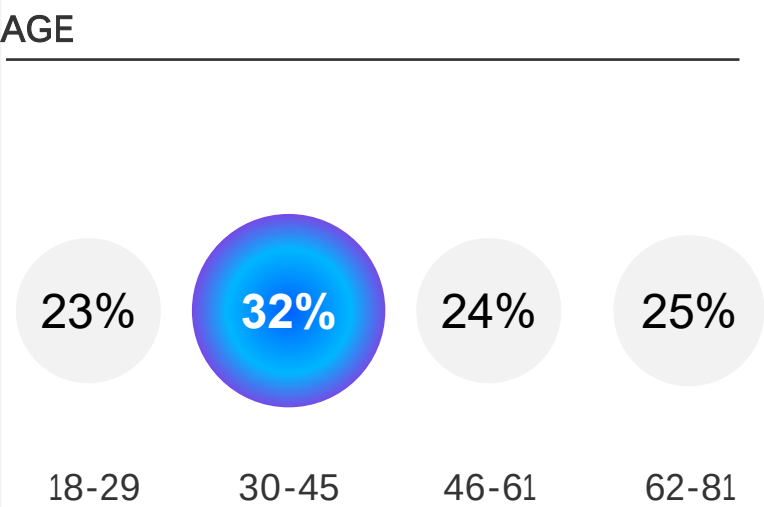


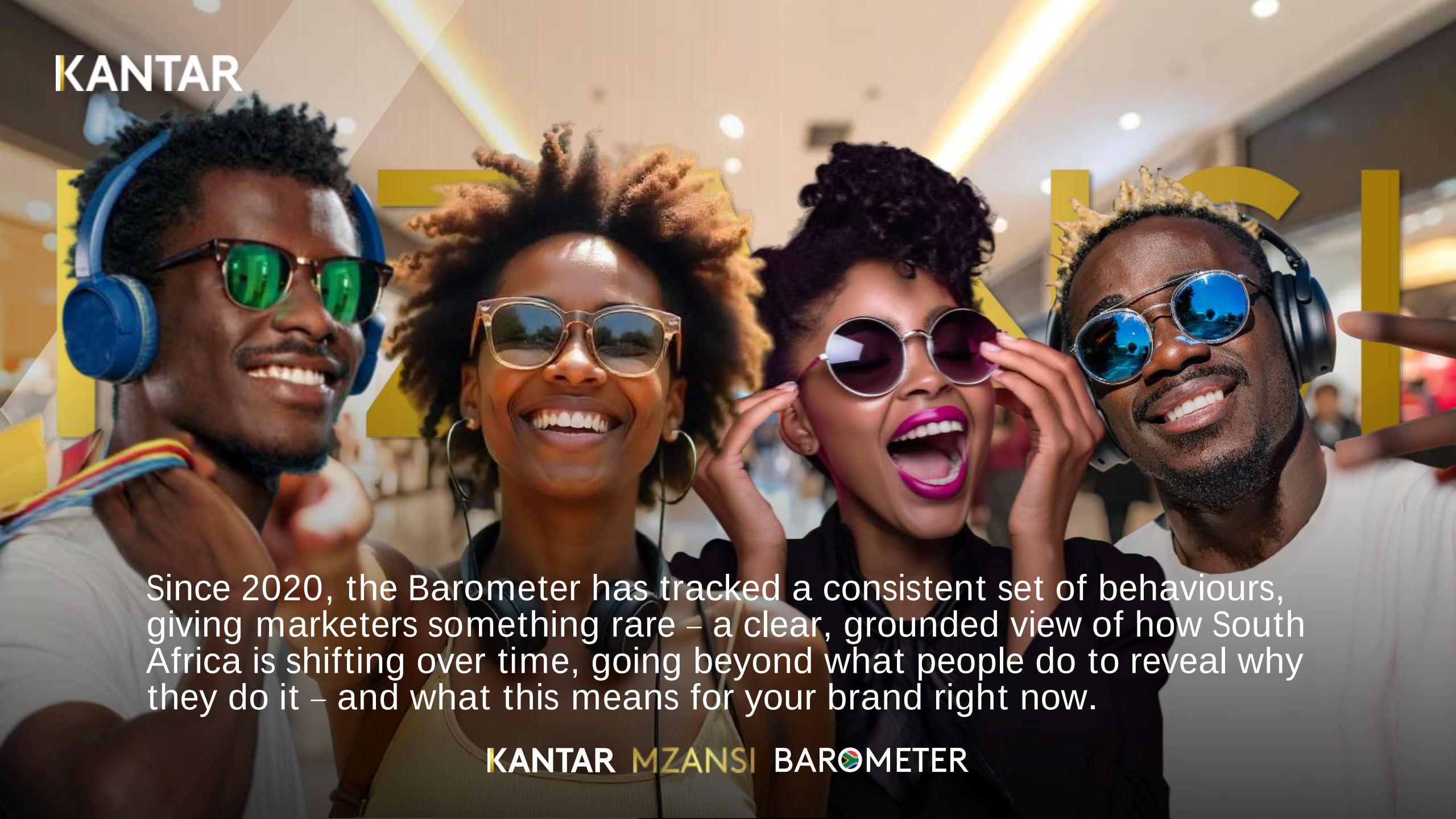
Sample



We spoke to 575 South Africans

representative of the connected* population of South Africa





KANTAR

Since 2020, the Barometer has tracked a consistent set of behaviours, giving marketers something rare – a clear, grounded view of how South Africa is shifting over time, going beyond what people do to reveal why they do it – and what this means for your brand right now.

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