KANTAR

MZANSI BAROMETER

2025 Snapshot of South African Consumer Behaviour

Watch the webinar on demand

Meet your speakers

Ivan Moroke CEO South Africa, Kantar	**Stacy Saggers** Commercial Growth Partner, Africa, Kantar	**Senamile Zungu** Commercial Lead, Kantar	**Ronak Gopaldas** Director, Signal Risk, Political Economist & Visiting Fellow at the London School of Economics

THE STATE OF OUR NATION

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Top five biggest concerns remain

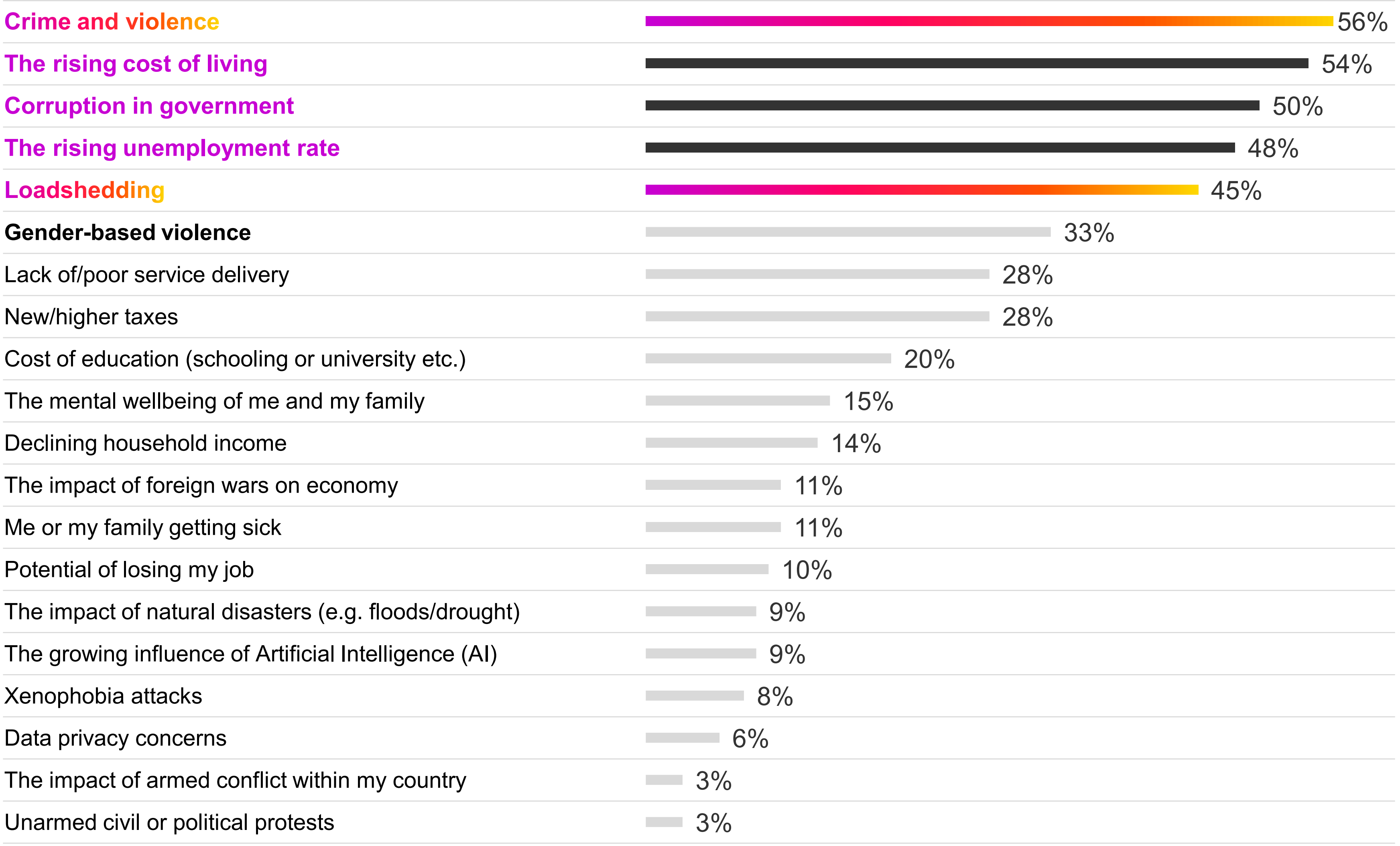
Crime and violence moves to first position from fourth

Corruption in government moves into third position, up from fifth

Gender-based violence moves up one position

In townships, unemployment and cost of living are first, followed by corruption, crime and loadshedding

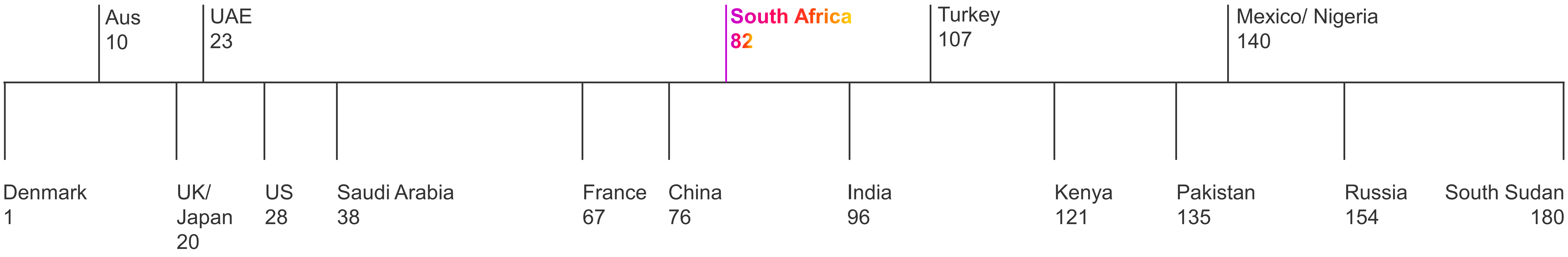
What South Africans are most concerned about in 2025



Base n=601; Total connected South Africans
Q034: Thinking about {#MKT}, what things are you most concerned about at the moment?

Corruption in government

Transparency International's Corruption Perceptions Index ranks countries and territories based on how corrupt their public sector is perceived to be. A country or territory's score indicates the perceived level of public sector corruption on a scale of 0 (highly corrupt) to 100 (very clean).



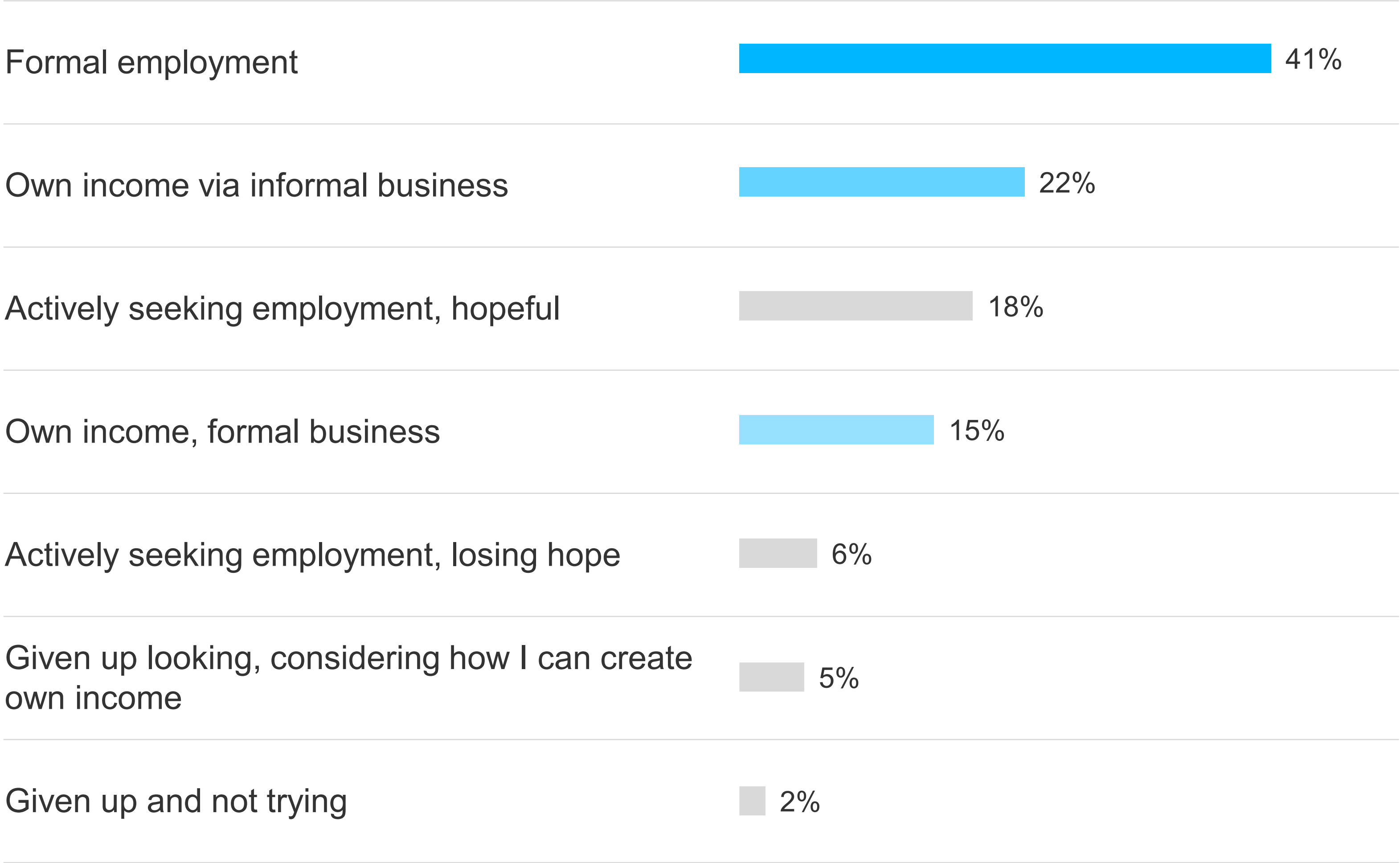
SA sits in the top 50% of least corrupt governments

https://tradingeconomics.com/country-list/corruption-rank

One in three are unemployed, and just over one in three are self-employed

30% actively seeking employment and hopeful in townships

Employment status

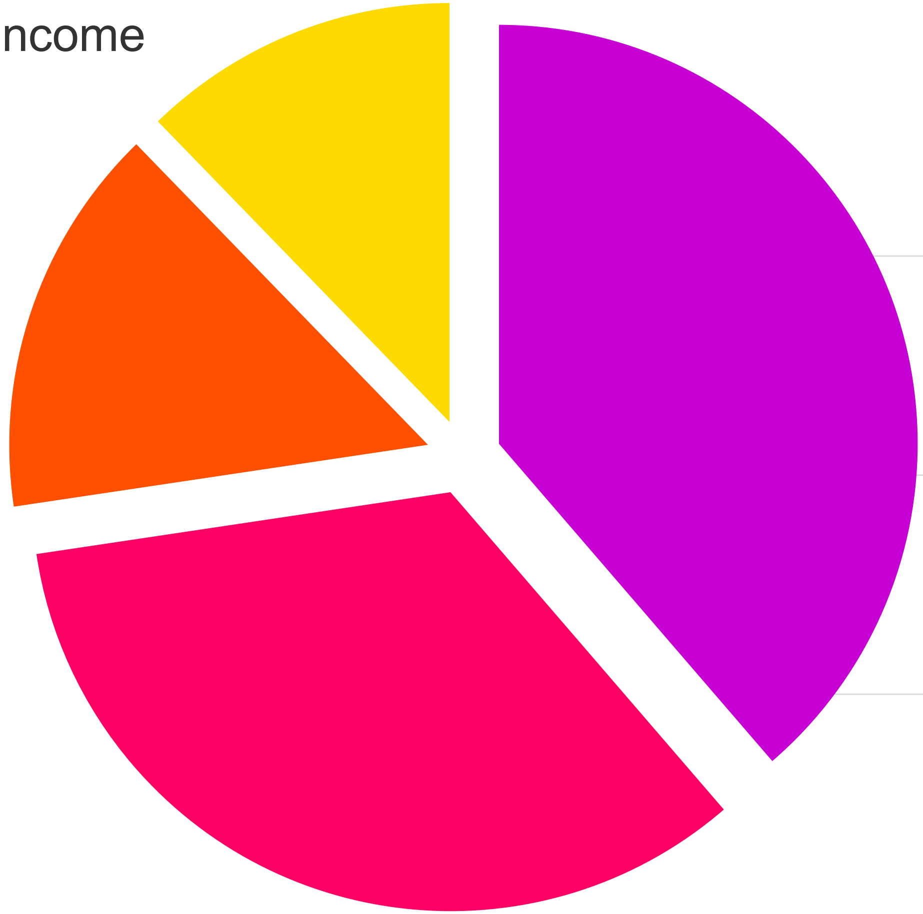


Base n=601; Total connected South Africans
ESH How would you best describe your employment status?

SELF-CLASSIFICATION BY BUSINESS OWNERS

Offering services

is the biggest activity amongst those who generate their own income



41% services

- Rental
- Maintenance
- Marketing and social media
- Auto repairs
- Nail and hair salon
- IT repairs
- Second-hand phone sales

36% buy and sell merchandise

- Clothes
- Shoes
- Weaves and wigs
- Homeware

16% selling food/restaurant

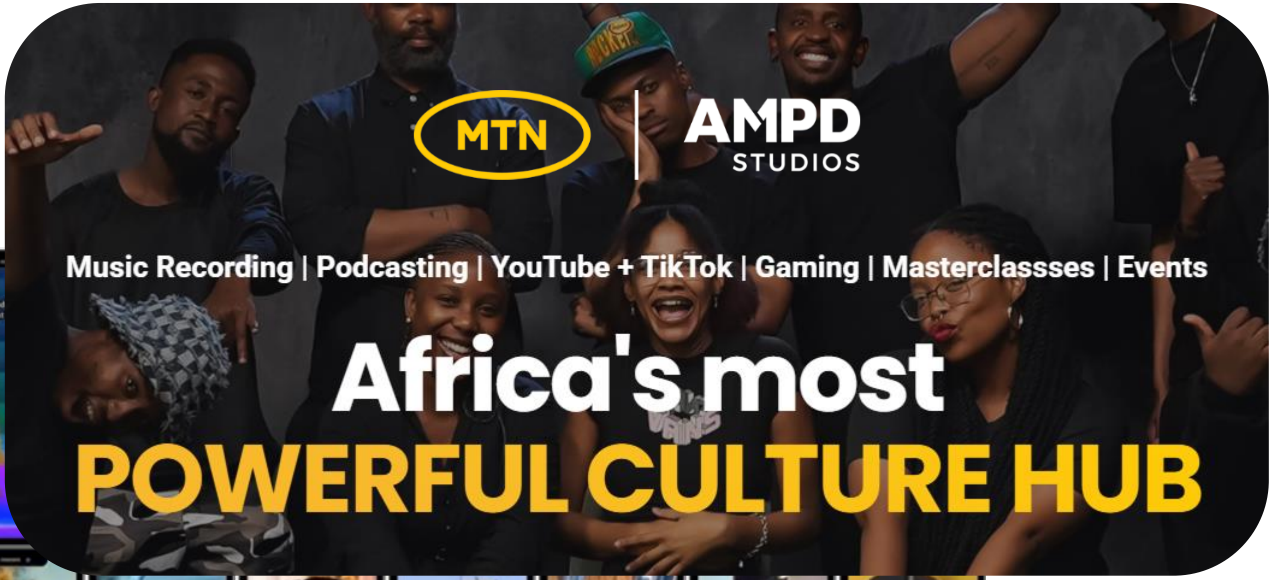
- Cake
- Snacks
- Fruit and veg
- Samoosas

13% financial services

- Investments
- Foreign exchange
- Sports betting

Base n=173; Connected South Africans with a business (either formal or informal)
SHUO What does your business do?

Everyday Creators
Everyday Content



The key to winning with short-form video advertising – turning content challenges into opportunities for brands while driving meaningful social impact

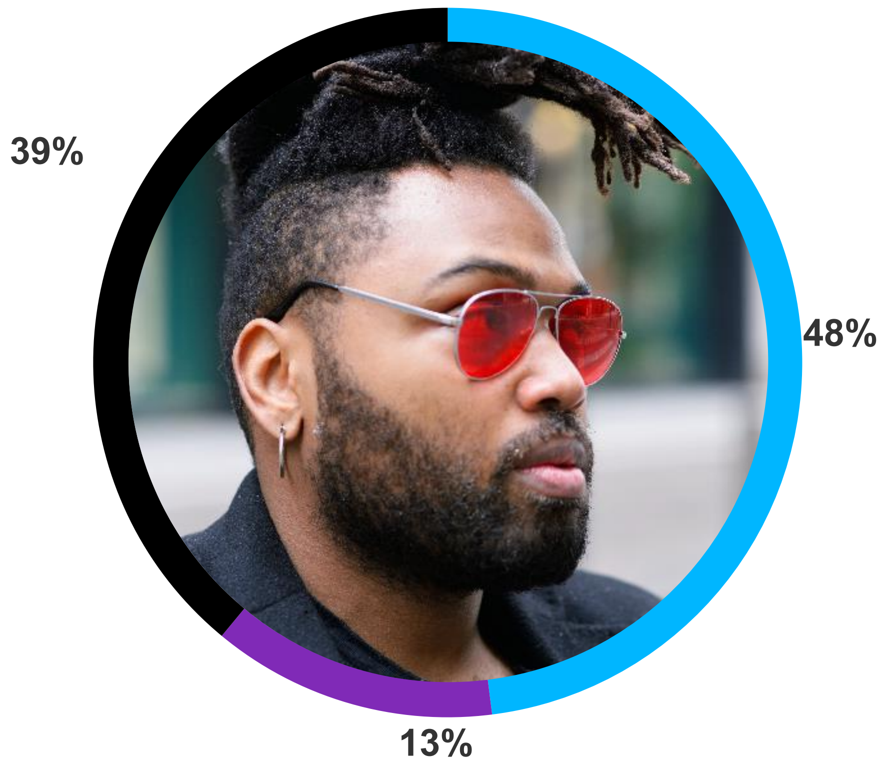
Things could look bleak, yet we are becoming more optimistic about the future

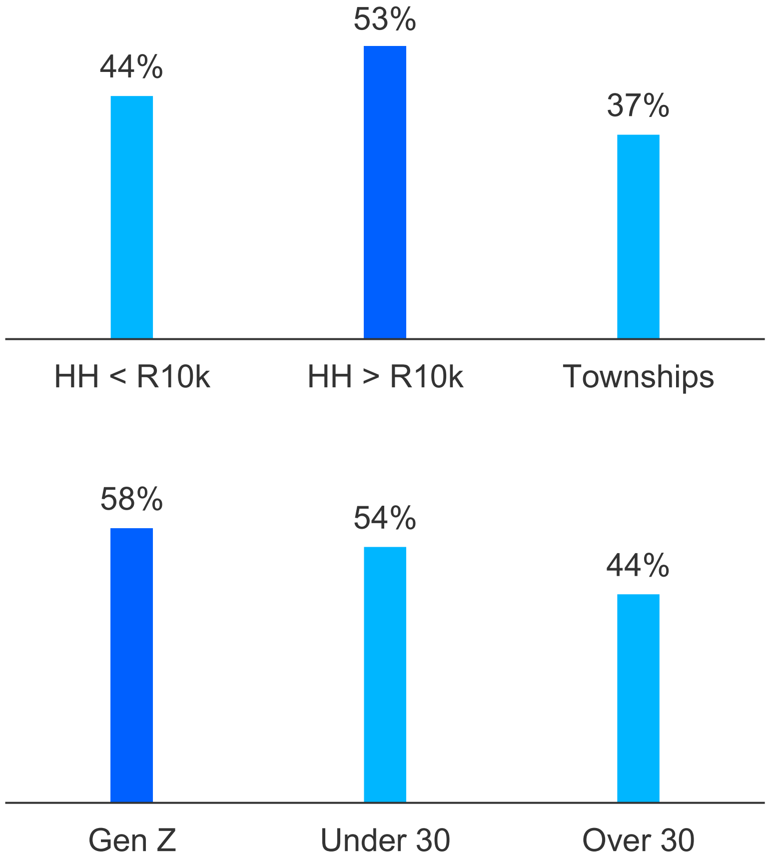
Things will get better has significantly increased, up from 40% in 2024, things will get worse down from 44%

Least optimistic are those with lowest household income and township-based 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=601 Connected South Africans,
FFC: And what is your general feeling about the future of {#MKT} over the next 5 years?

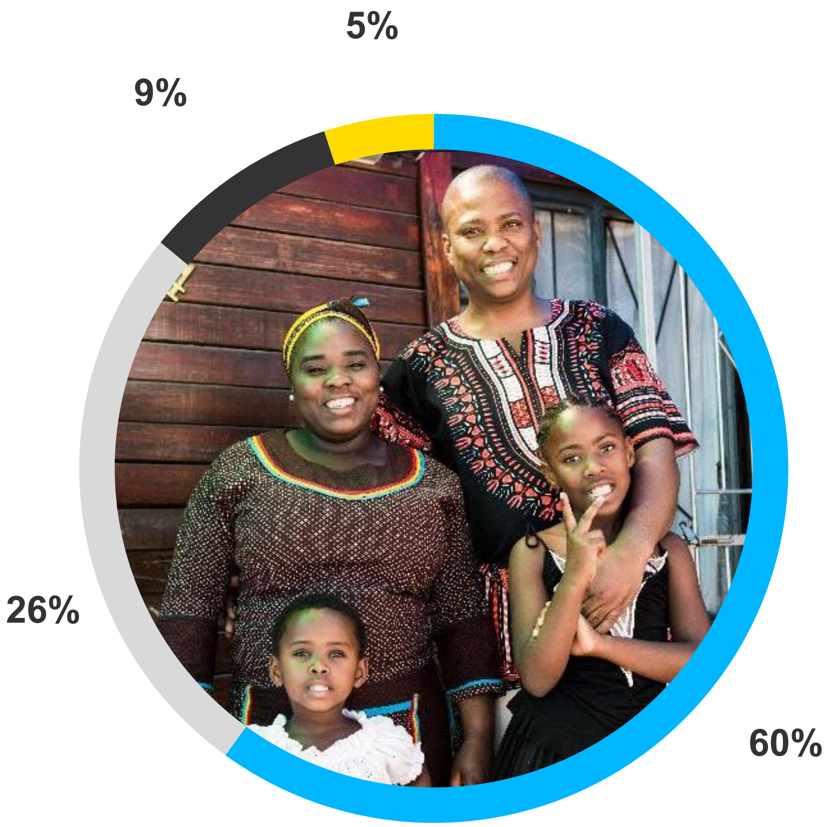
And we are increasingly positive about our own household finances

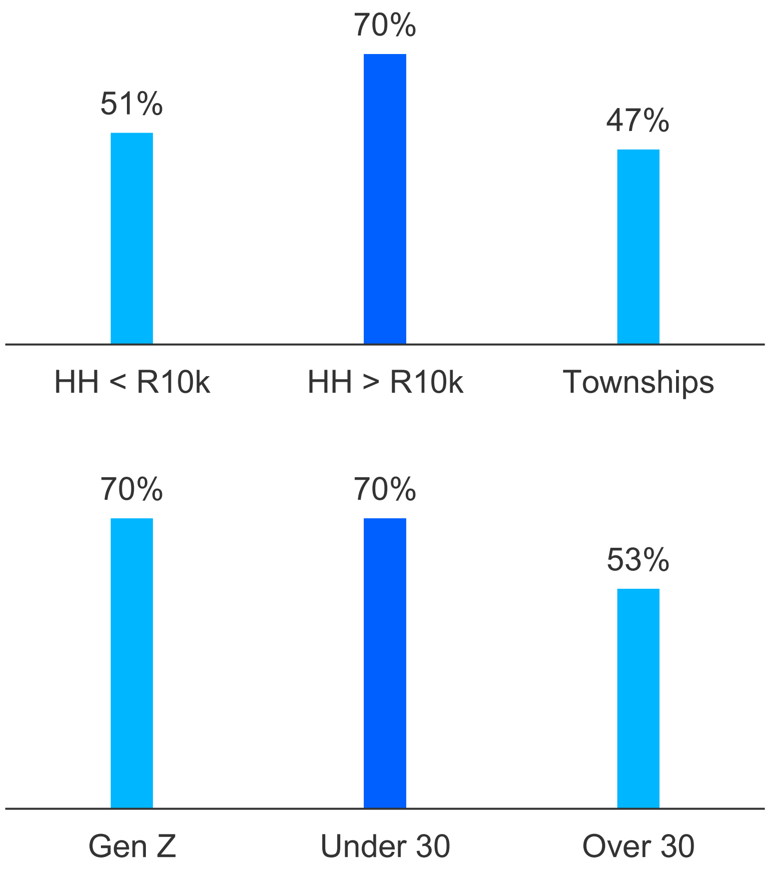
Better off financially increasing from 54%

Particularly higher income and under-30-year-olds. Just under half in townships believe their financial position will improve

Future household financial position

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



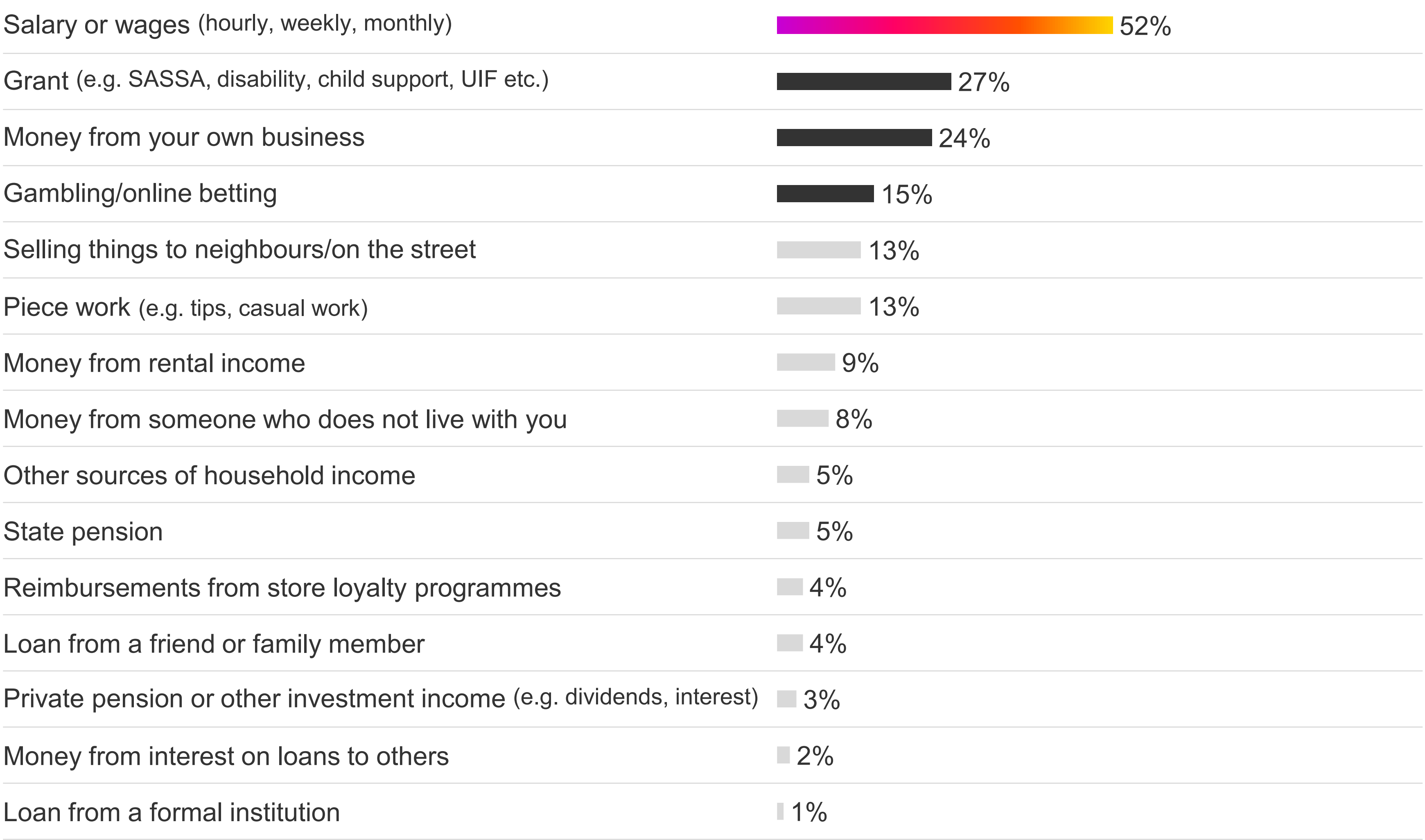


Base n=601 Total connected South Africans
FS3 Now looking ahead a year from now, do you think that you and your dependants will be:

The sources of household income remain salaries, grants and piece work

Gambling still in fourth but increased, piece work also increased from 17%, grants decreased from 32%

Sources of household income



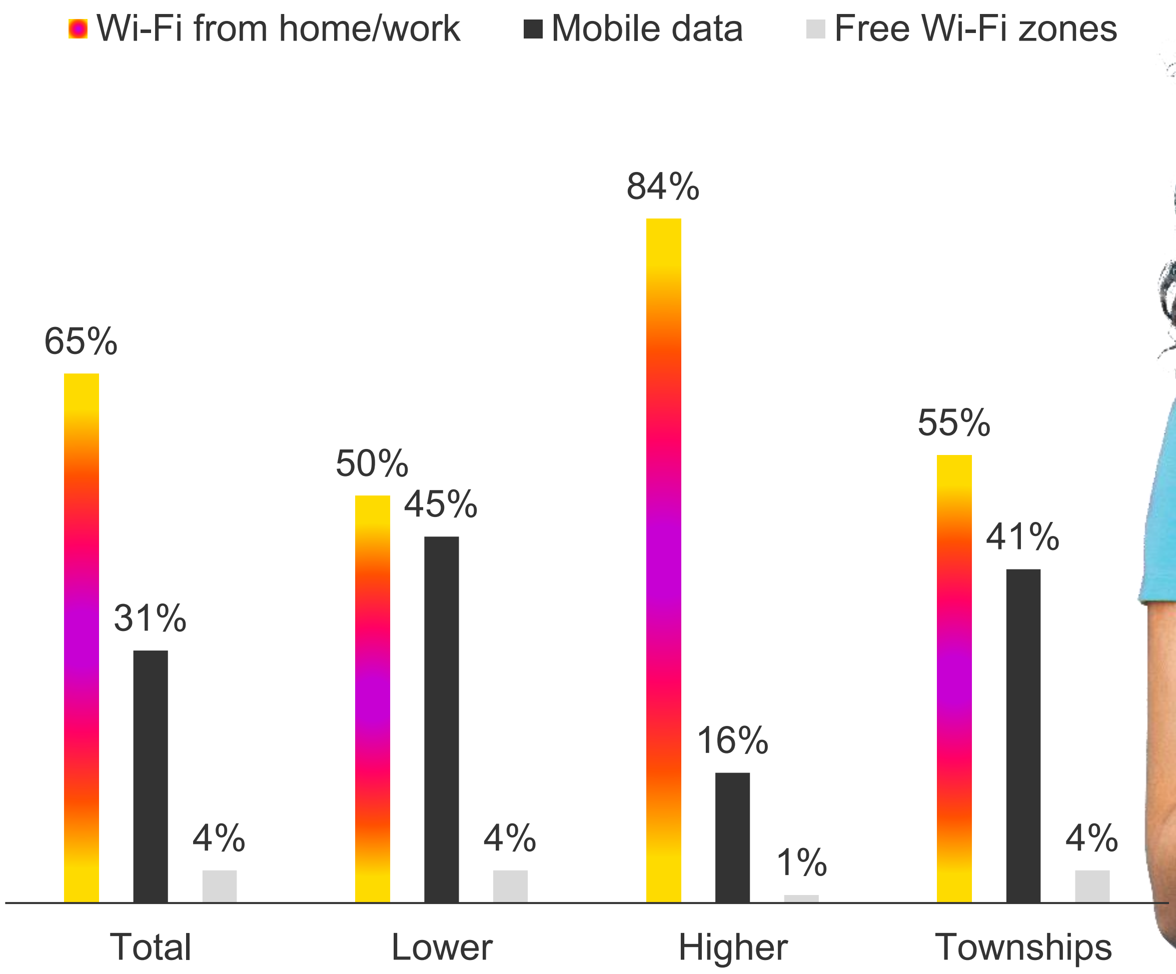
Base n=601 Total connected South Africans
FS14 Which of these contribute towards your whole household's monthly income?

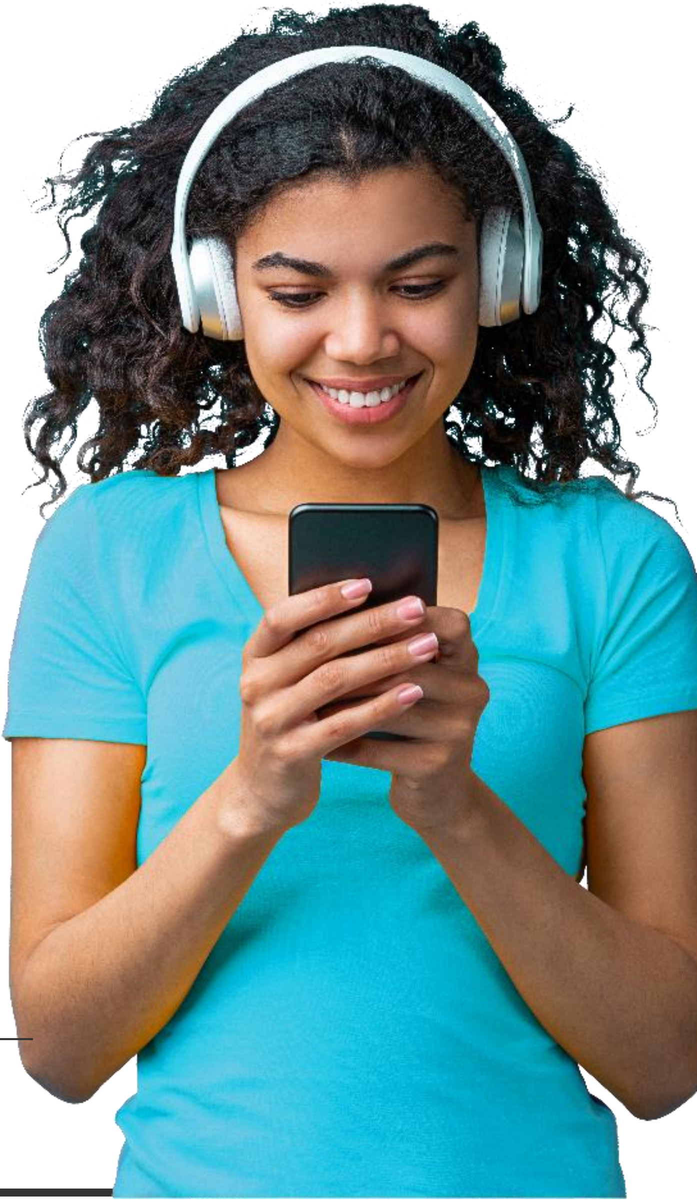

REACH OUR NATION
KANTAR MZANSI BAROMETER


WELCOME TO
TODAY'S EPISODE

South Africans predominantly use Wi-Fi, a third access via mobile data

Which of these describes how you use the internet most of the time?





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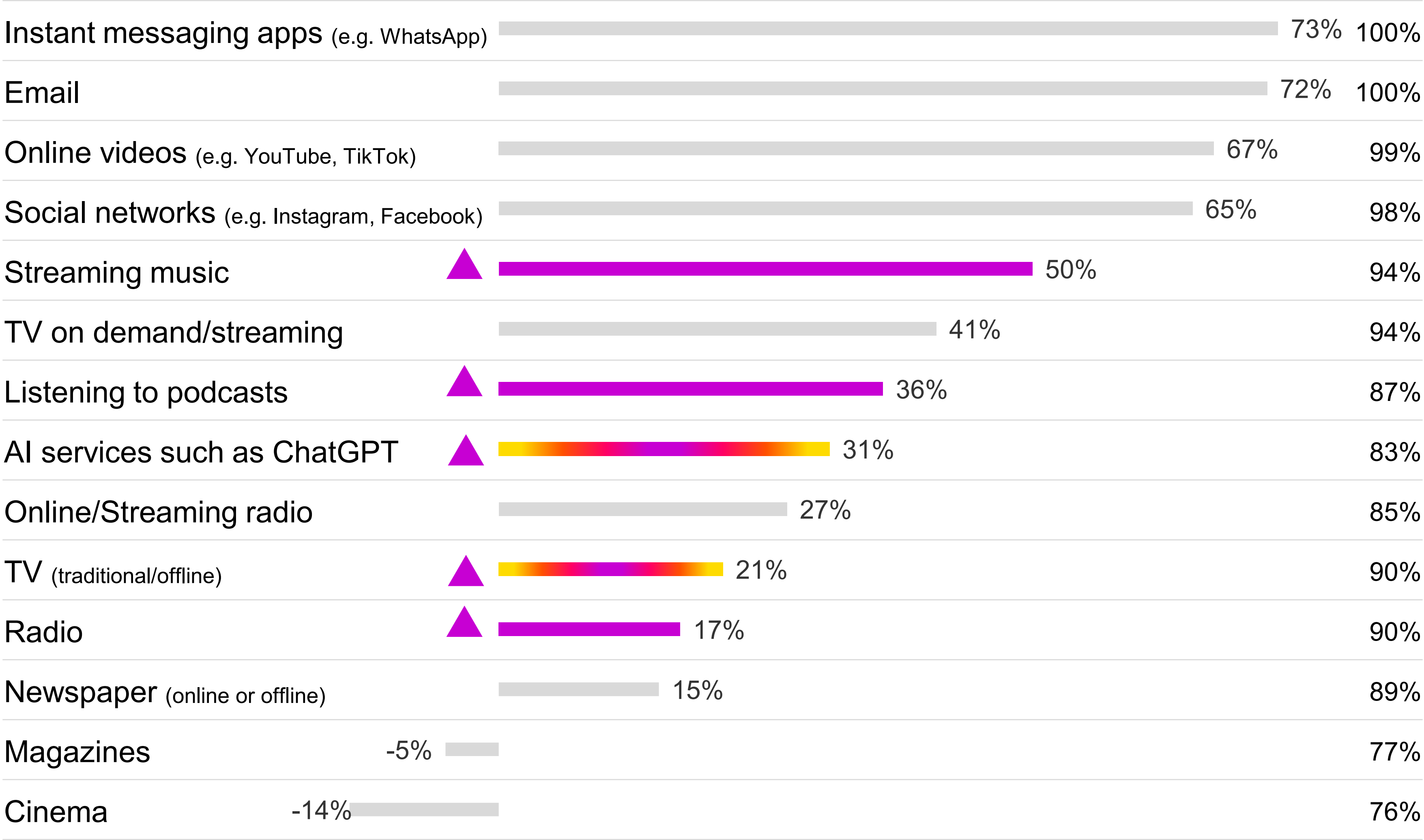
Base n=601 Total connected South Africans
FS10 Which of these best describes how you mostly access the internet?

Socials and OLV remain high, streaming music and podcasting growing

Nett increase in use of media channels



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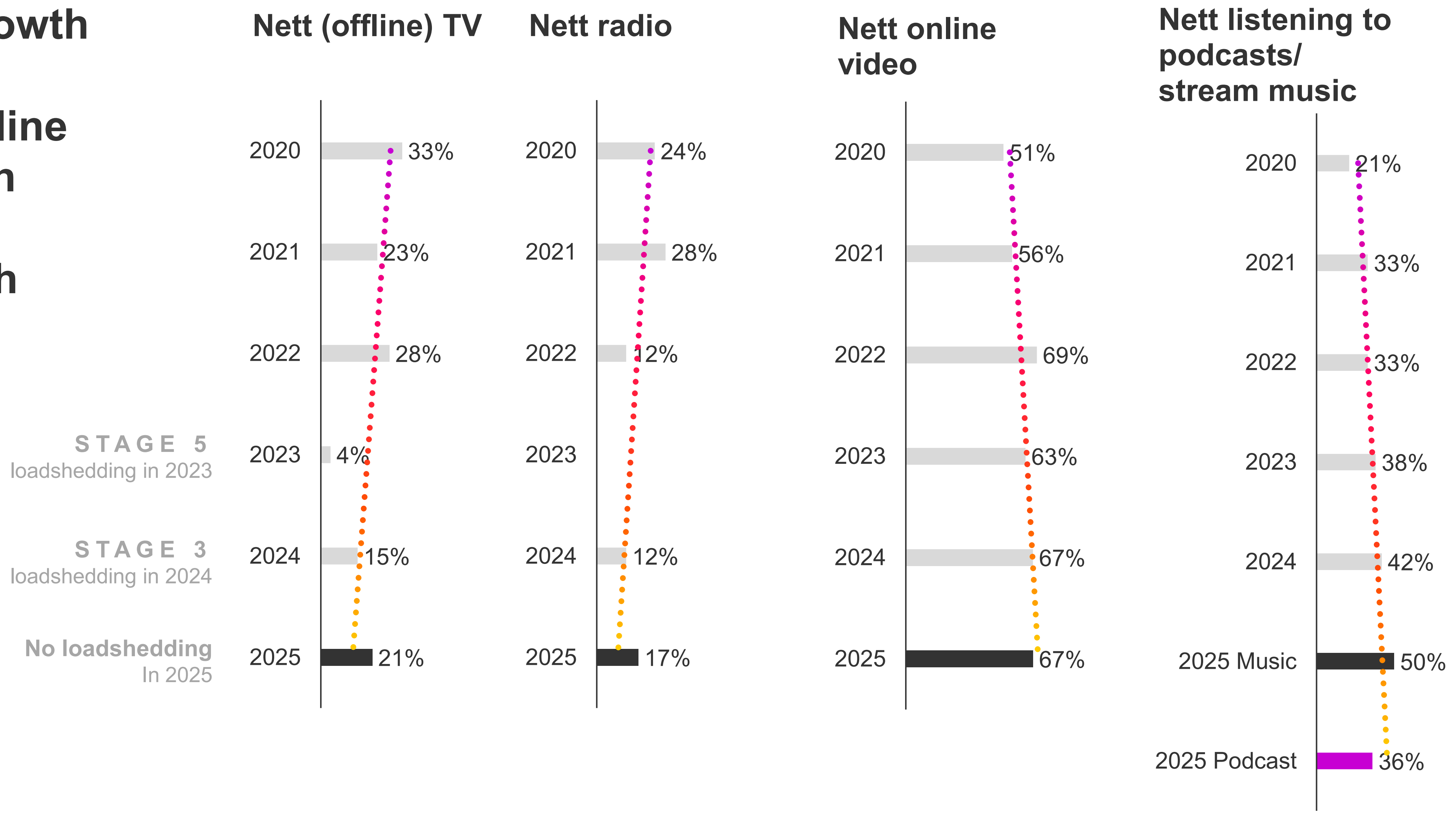
Base n=601 Total connected South Africans
MD1 Compared to a year ago, how has your usage of the following media types changed?

Returning growth to traditional channels, online channels with consistently higher growth



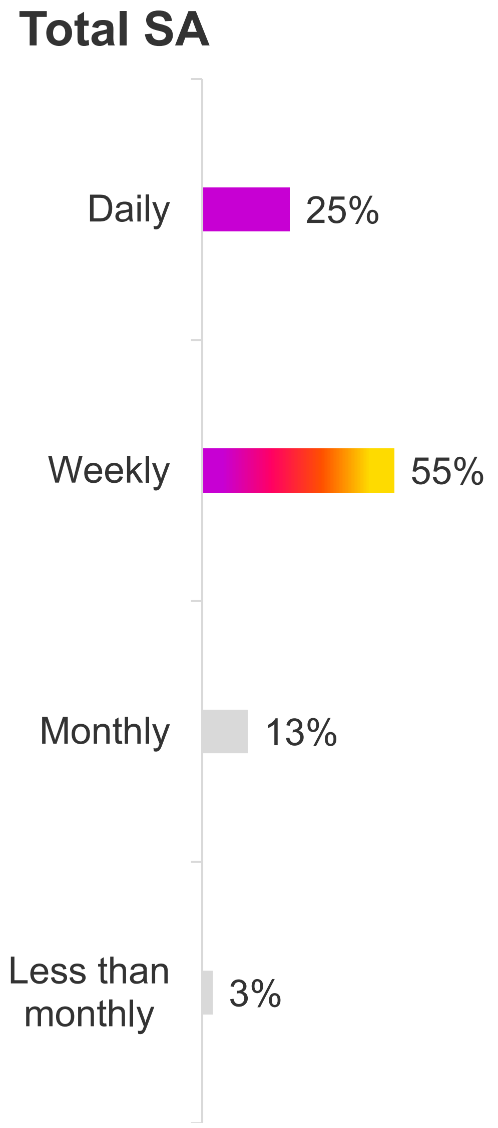
Base n=601 Total connected South Africans
MD1 Compared to a year ago, how has your usage of the following media types changed?

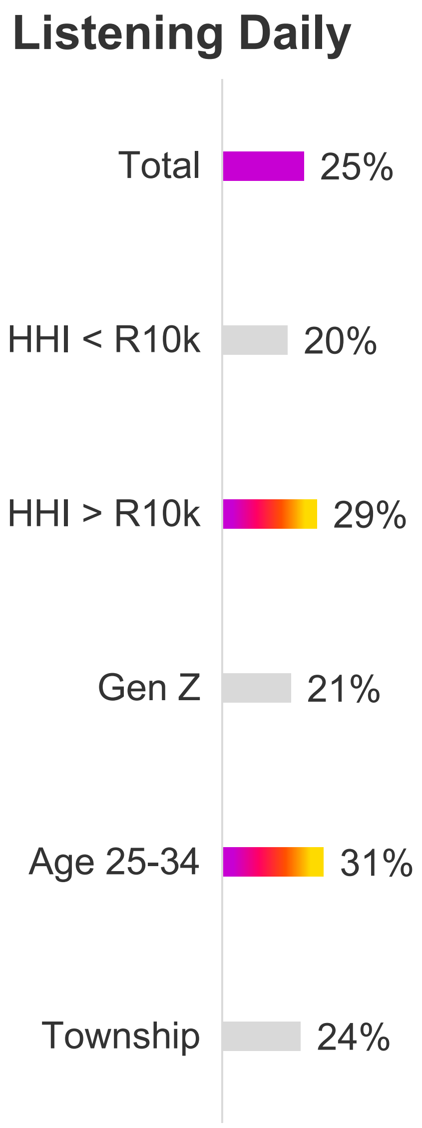
It be Lit... the Creator Economy Shift

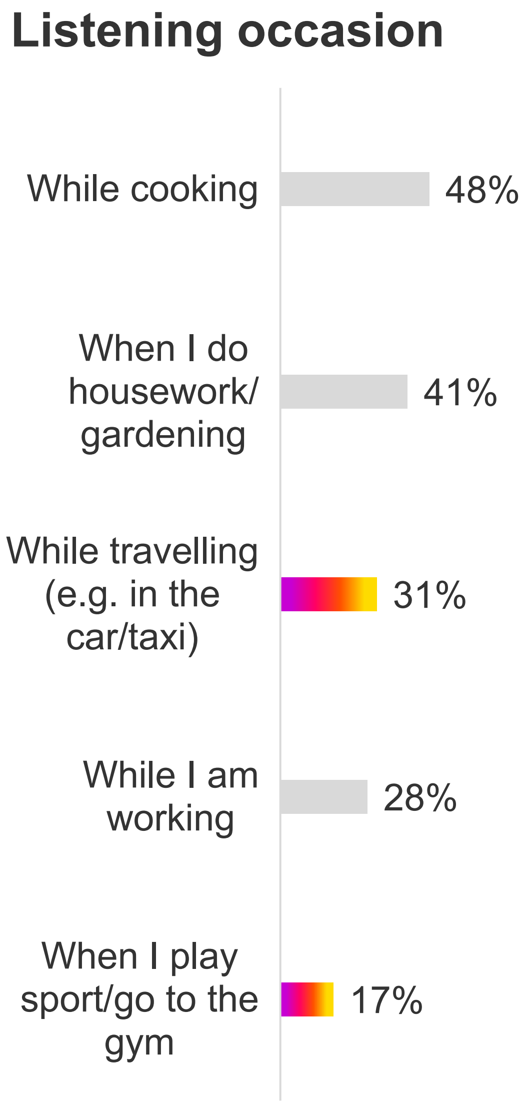
One in four listen to podcasts daily

63%

prefer podcasts under **45 minutes long**







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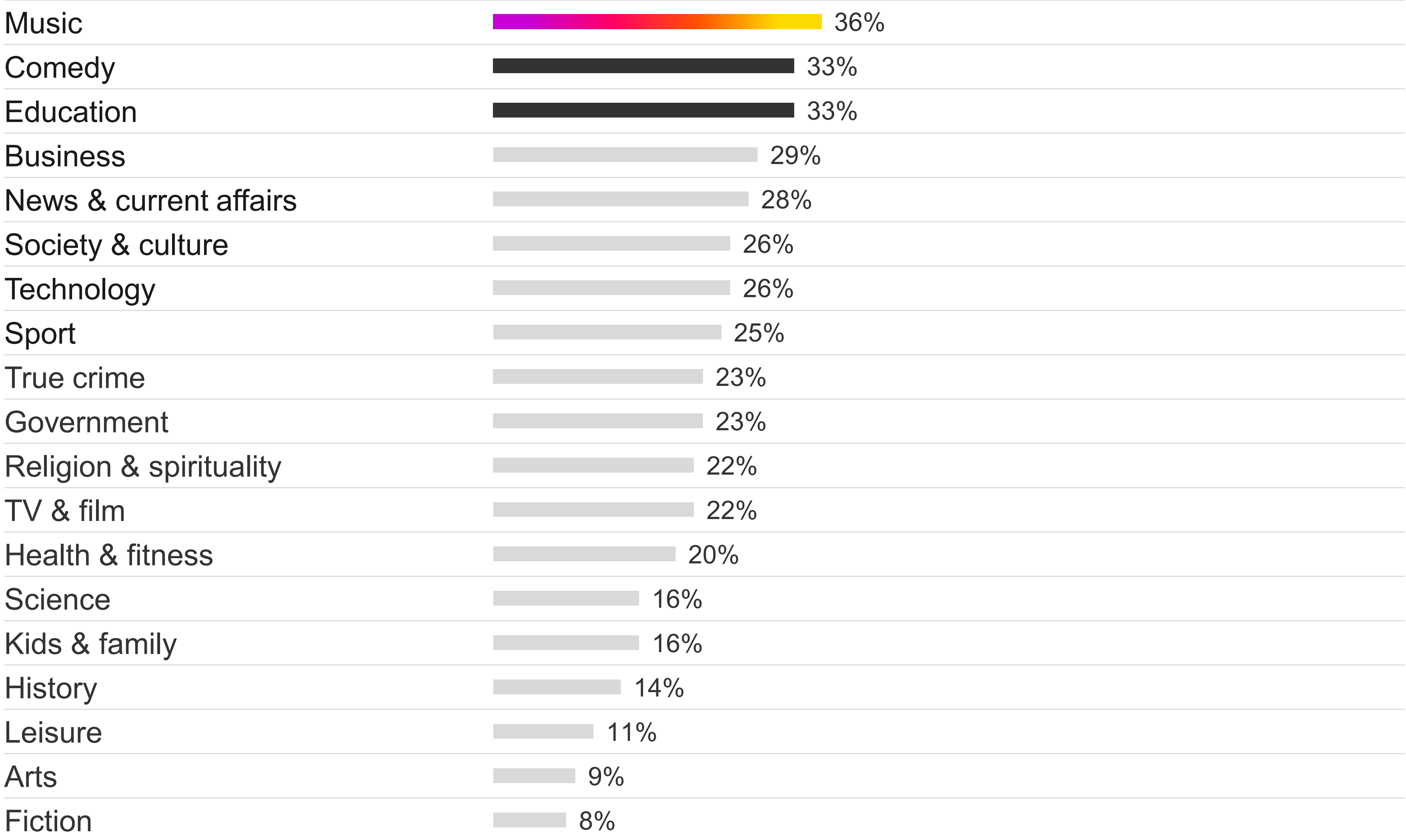
Base n=601 Total connected South Africans
PCF How often do you listen to podcasts?

Music, comedy and education top the charts

Preferred genre of podcast



Base n=601 Total connected South Africans
PCG What type of podcasts do you watch/listen to?

TikTok, Spotify and YouTube continue to grow

YouTube up from 61% in 2024

Tik Tok up from 53% in 2024

Facebook consolidate in 2025, into third position

Spotify up from 24% in 2023

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

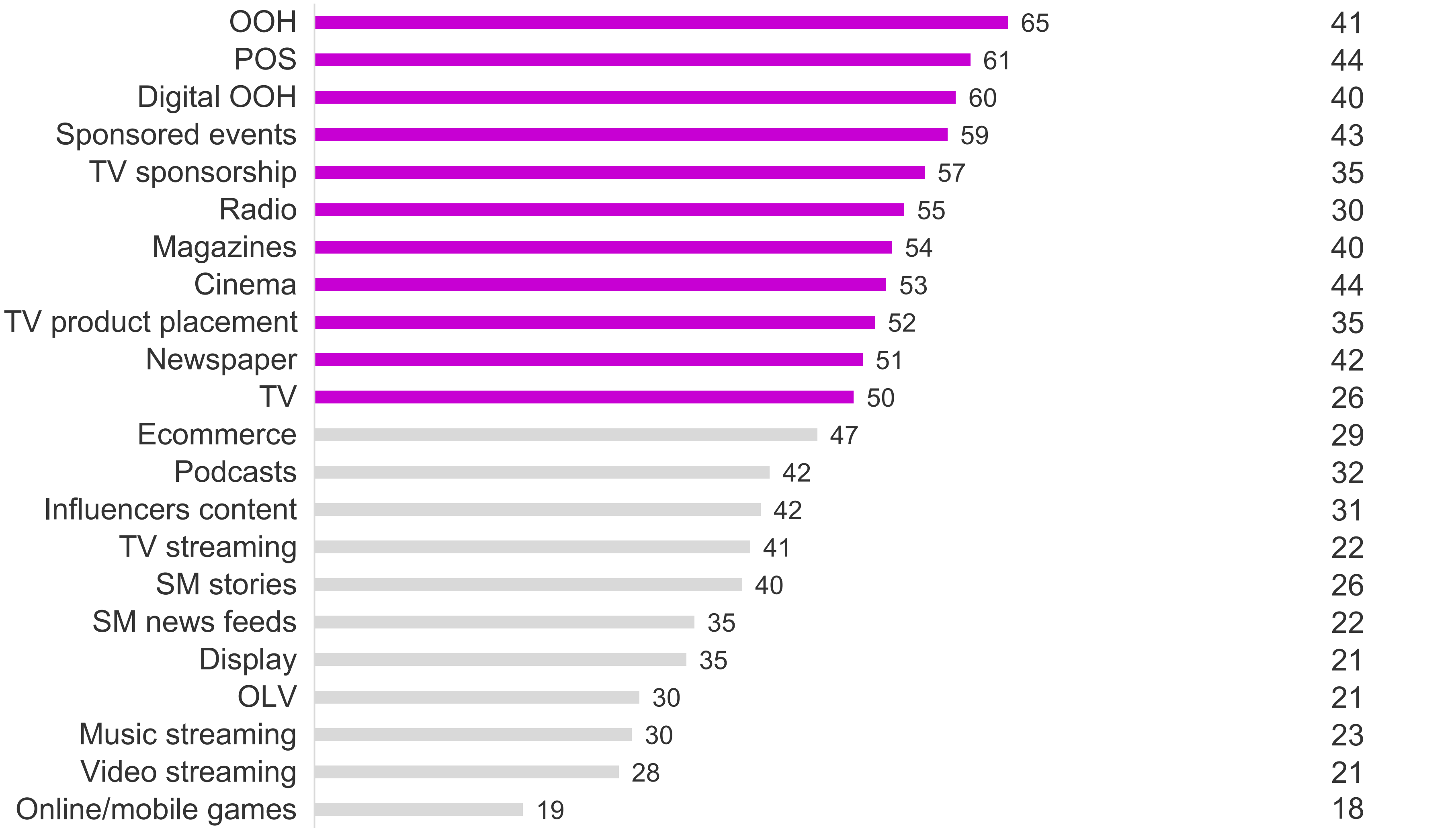
	Nett increase	Penetration
WhatsApp	79%	100%
YouTube	69%	99%
Facebook and Facebook Marketplace	60%	96%
TikTok	56%	89%
Instagram	35%	85%
Spotify Music/Podcasts	34%	86%
X (previously Twitter)	20%	76%
LinkedIn	20%	82%
Web conferencing platforms (e.g. Zoom, MS Teams etc.)	17%	77%
Apple Music/Podcasts	5%	66%
Pinterest	4%	74%
RedNote	-2%	53%

Base n=601 Total connected South Africans
MD2 How has your use of these social networks and instant messaging platforms changed in comparison to last year?

And yet, we prefer to be spoken to on offline channels

Of the online platforms, ecommerce is most preferred, followed by podcast and influencer content

AD EQUITY



Even Gen Z’rs don’t find it lit

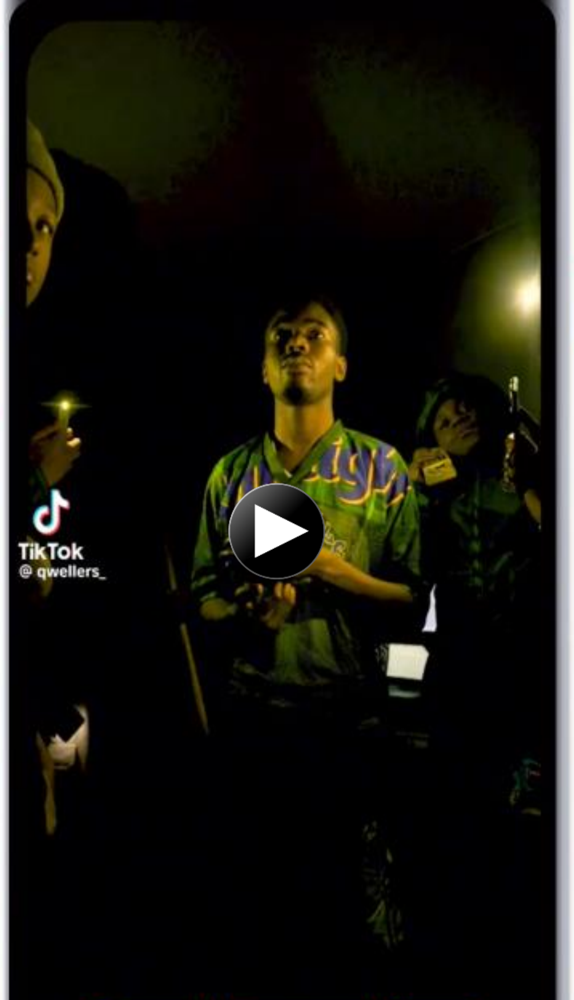
And yet they are most engaged in online behaviour

GENERATIONS




Gen Z	Gen Y	Gen X	Boomers
OOH	POS	OOH	TV sponsorship
TV product placement	OOH	Digital OOH	TV
POS	Digital OOH	Sponsored events	
Sponsored events	TV sponsorship	Cinema	
Digital OOH	Magazines	POS	

#3 Don't make ads, make **entertainment**



Everything qualifies for entertainment

User-generated content slaps

THE PLATE OF OUR NATION

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Kantar's shopper panel shows FMCG inflation at 8% v CPI at 3.2%

Ave price paid per volume 12 MM Dec 24

Kantar Worldpanel

Rice	18%
FMCG	8%
Cheese	7%
Beer	6%
Toilet soap	5%
CSD	5%
UHT milk	3%
Maize	3%
Coffee	2%
Bread	2%
Dishwashing liquid	0%

Source: Kantar Worldpanel, 12 ME Dec 23 vs 12 ME Dec 24

In fact, over time we are eating and using less

83%
FMCG categories in volume decline

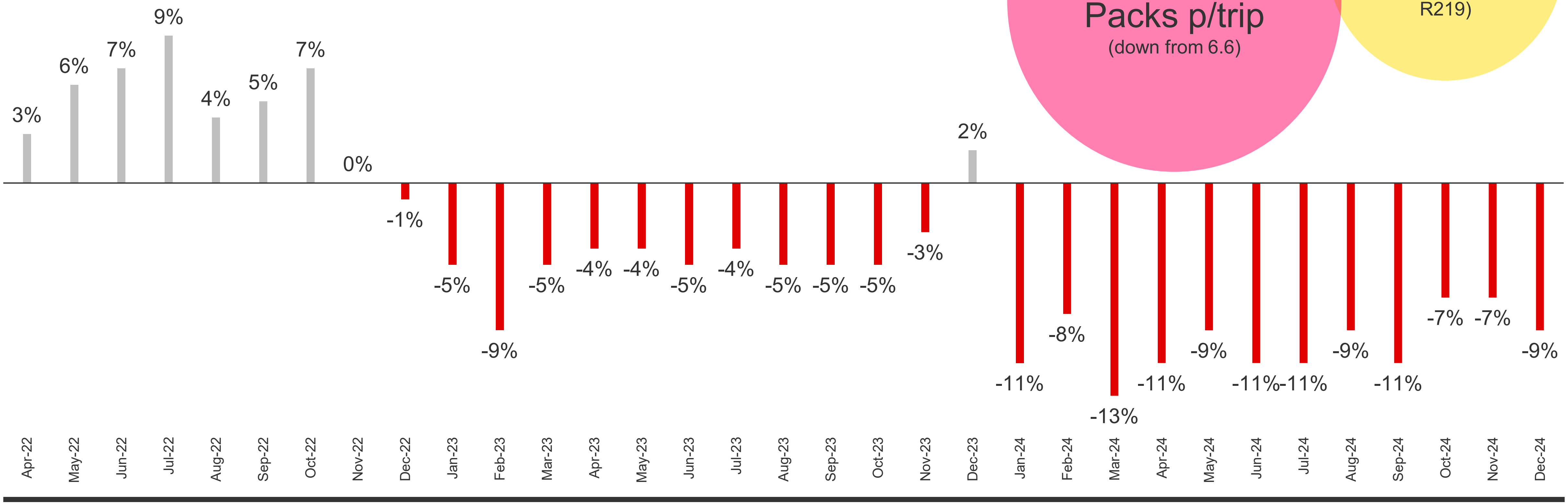
102 Trips
(down from 111)

6.4 Packs p/trip
(down from 6.6)

R215 p/trip
(down from R219)

Total FMCG

Packs per household | % Change vs year ago



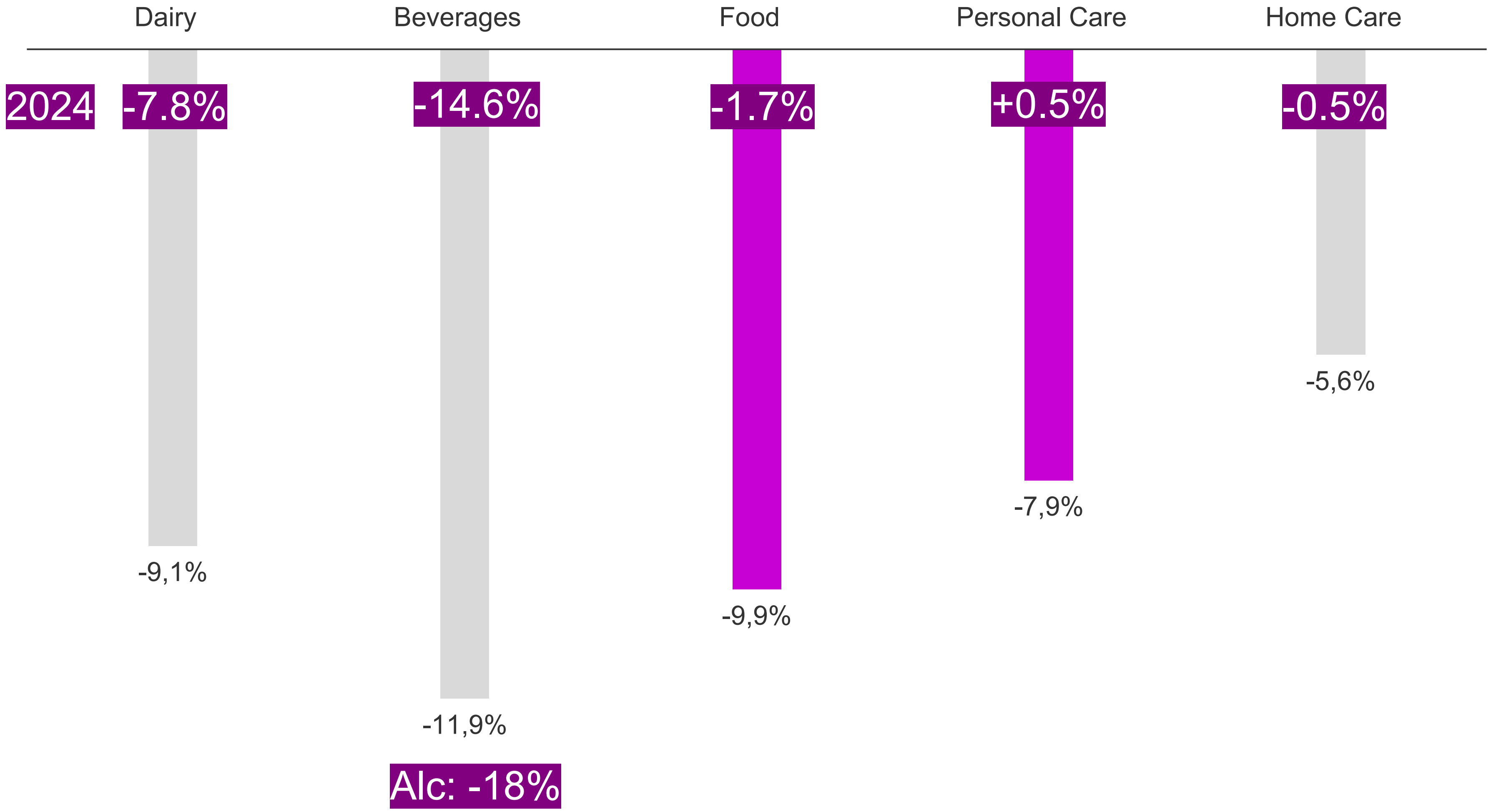
Source: Kantar Worldpanel
FMCG Definition: 117 food (excluding fresh), dairy, beverage, personal and home care categories

And prioritising essential categories

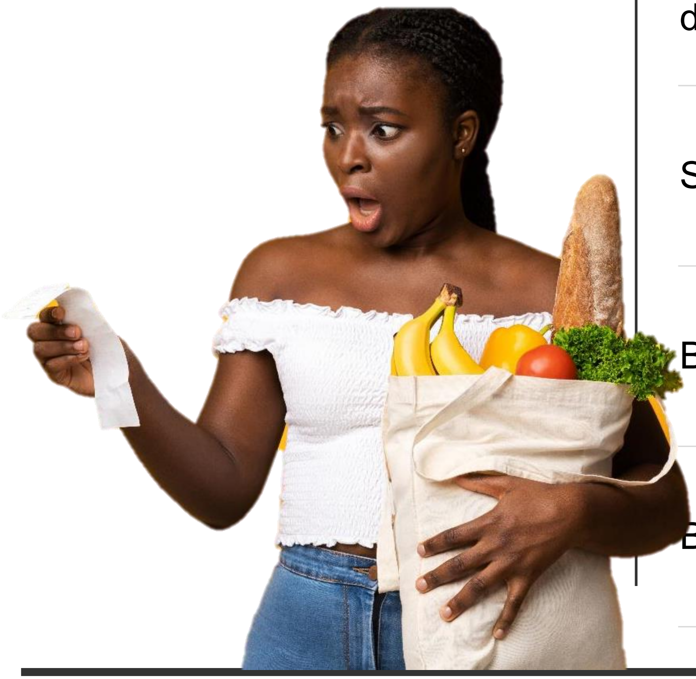
While we are still spending the same amount per trip, we are buying fewer things

Total FMCG – Packs (volume)

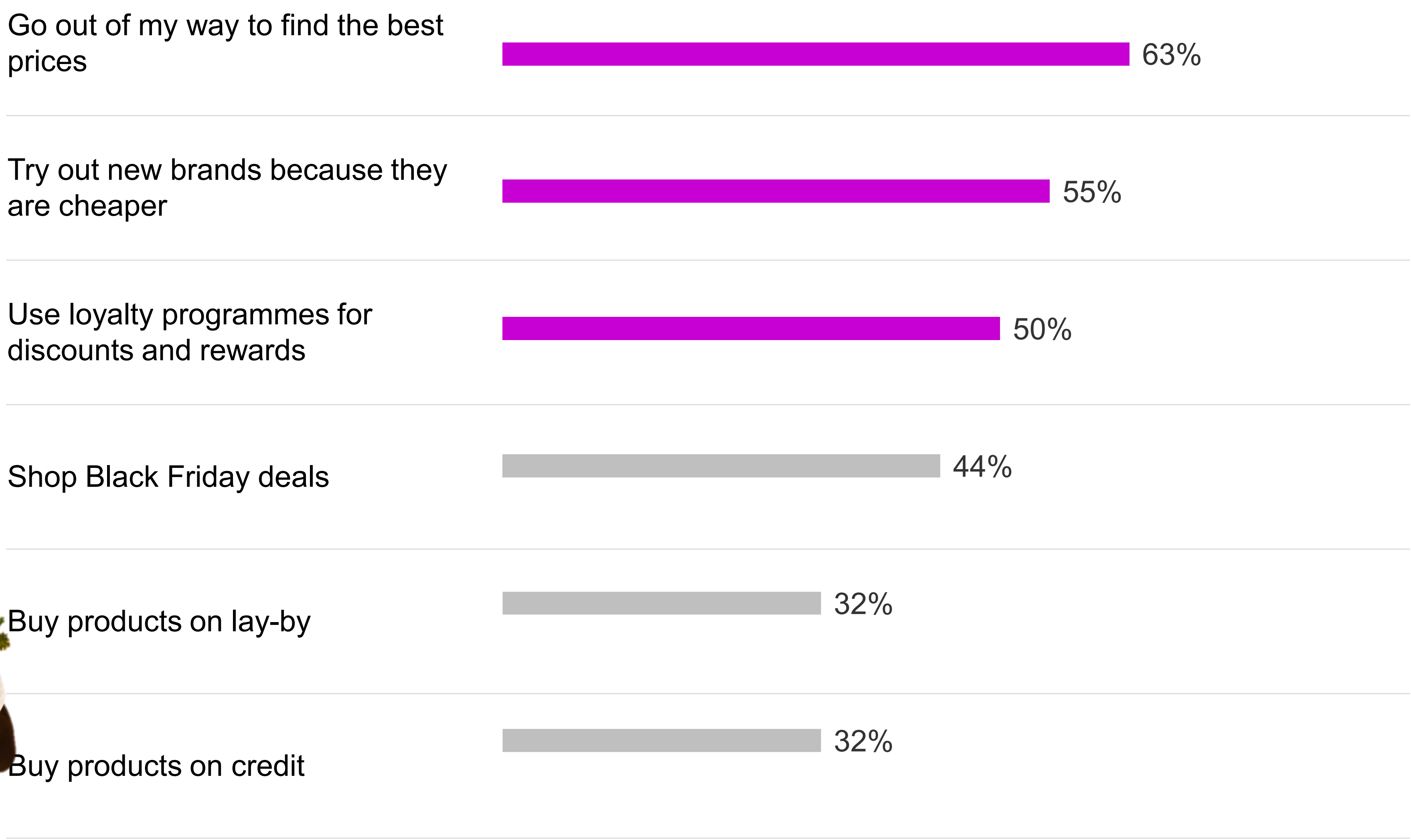
Packs per household | % Change vs year ago | 12 ME Dec 24 vs ago



And “doing more of” finding ways to stretch the budget through creative and savvy solutions

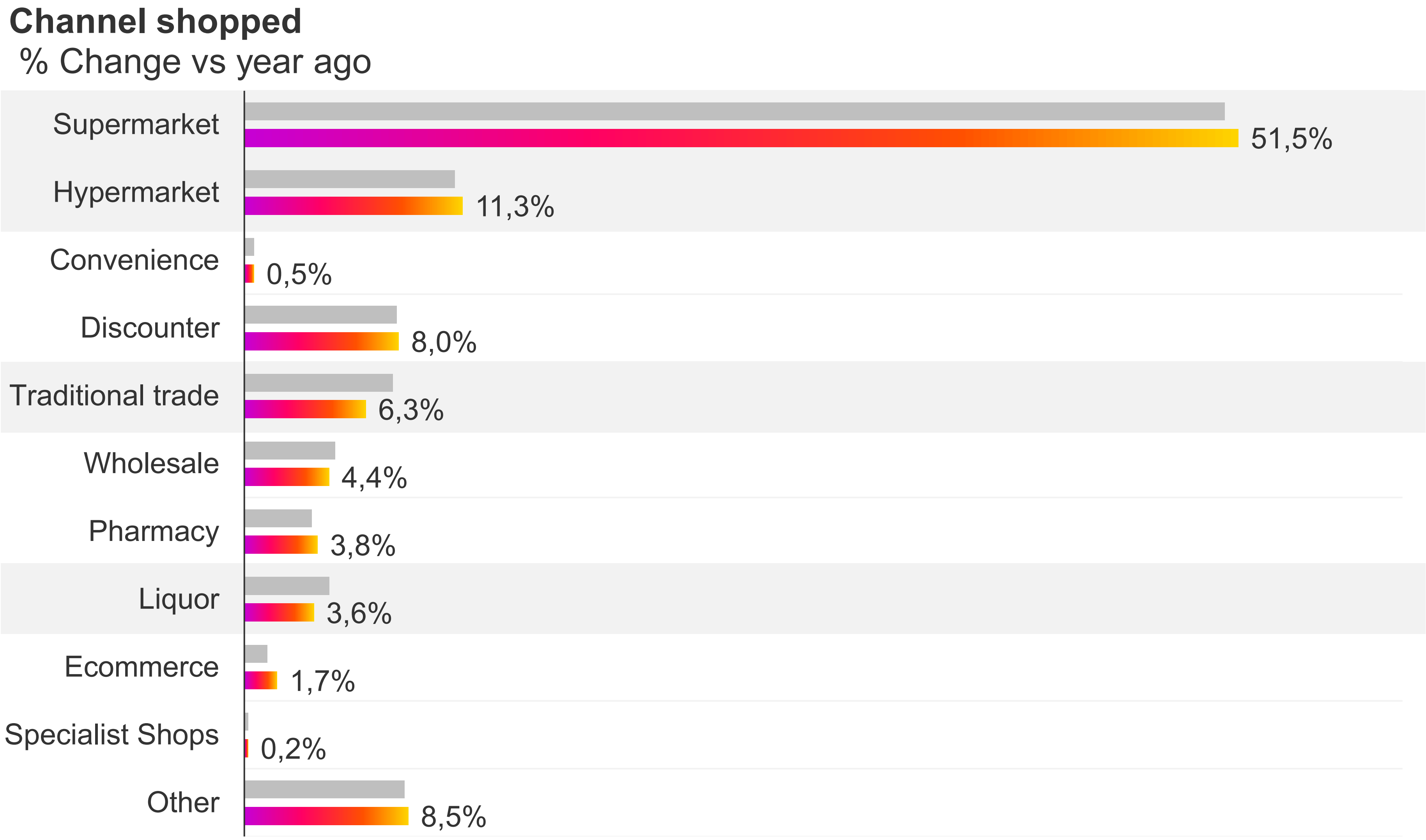


Changes in purchase behaviours



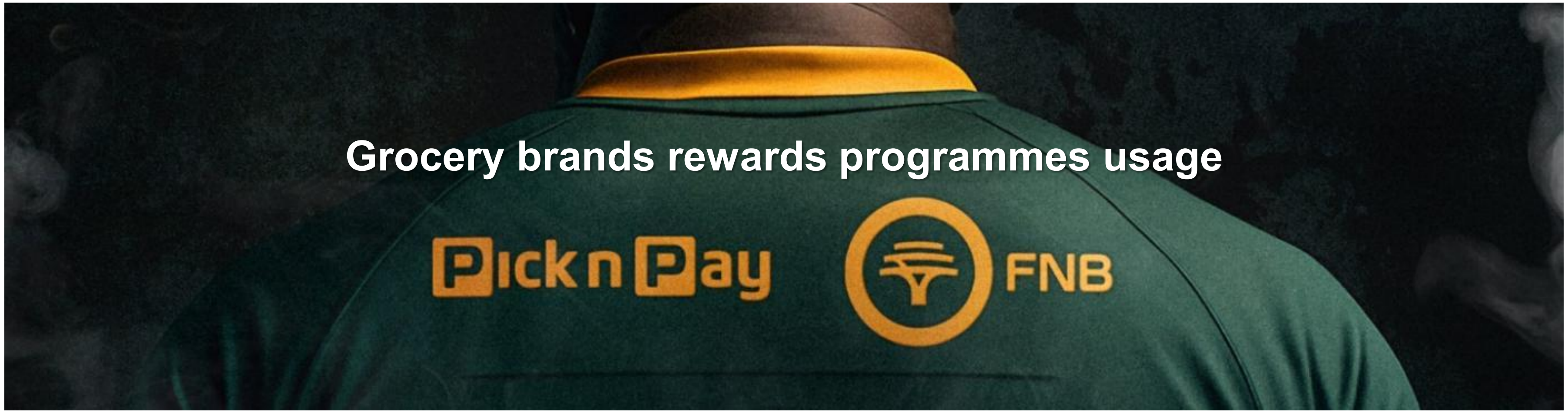
Base n=601 Connected South Africans,
FFC: And what is your general feeling about the future of {#MKT} over the next 5 years?
PB1 Thinking about your shopping habits, in comparison to last year, do you

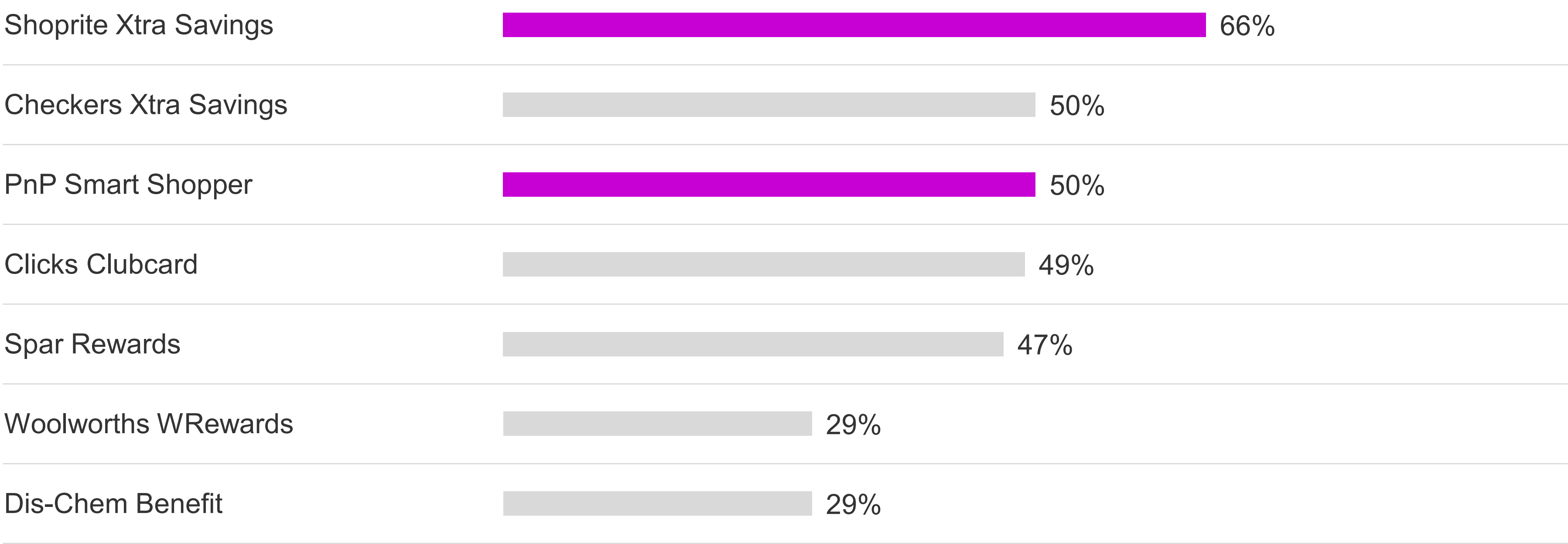
Choosing modern trade because we can budget before the shopping trip



And gives us access to rewards programmes that we can control

But these programmes have to meet our needs!

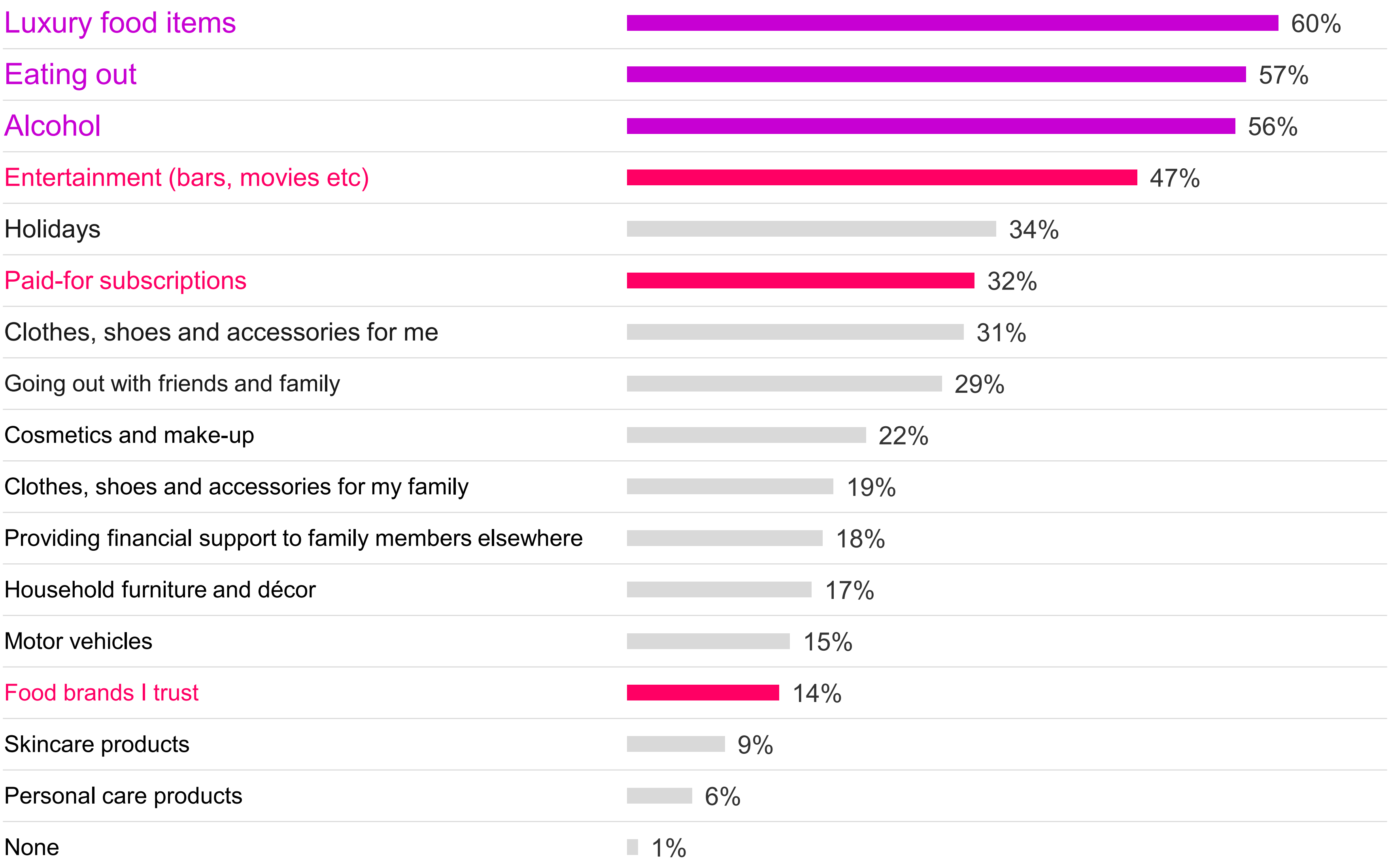




Base n=601 Connected South Africans,
LPR Which of these loyalty programmes do you regularly use?

And "doing less of" buying luxuries, eating out and out-of-home entertainment

Cutting back on alcohol has increased from 50% in 2024



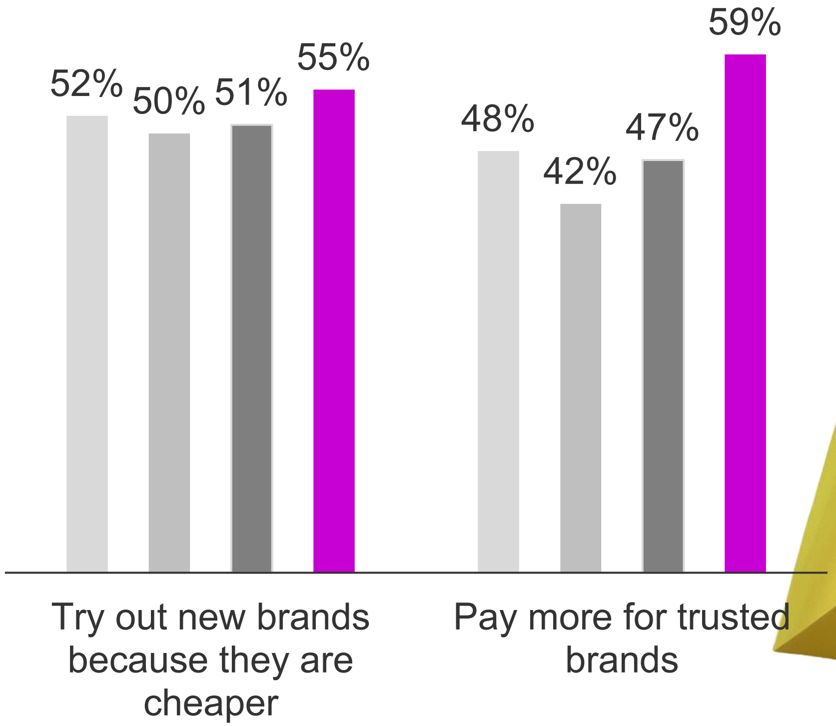
Base n=601 Total connected South African
FS16 And what are some of the things that you are cutting back spending on?

Becoming polarised in spending; down-trading vs prioritising

Two-thirds will put budget behind the brands we know and trust, even if they are more expensive

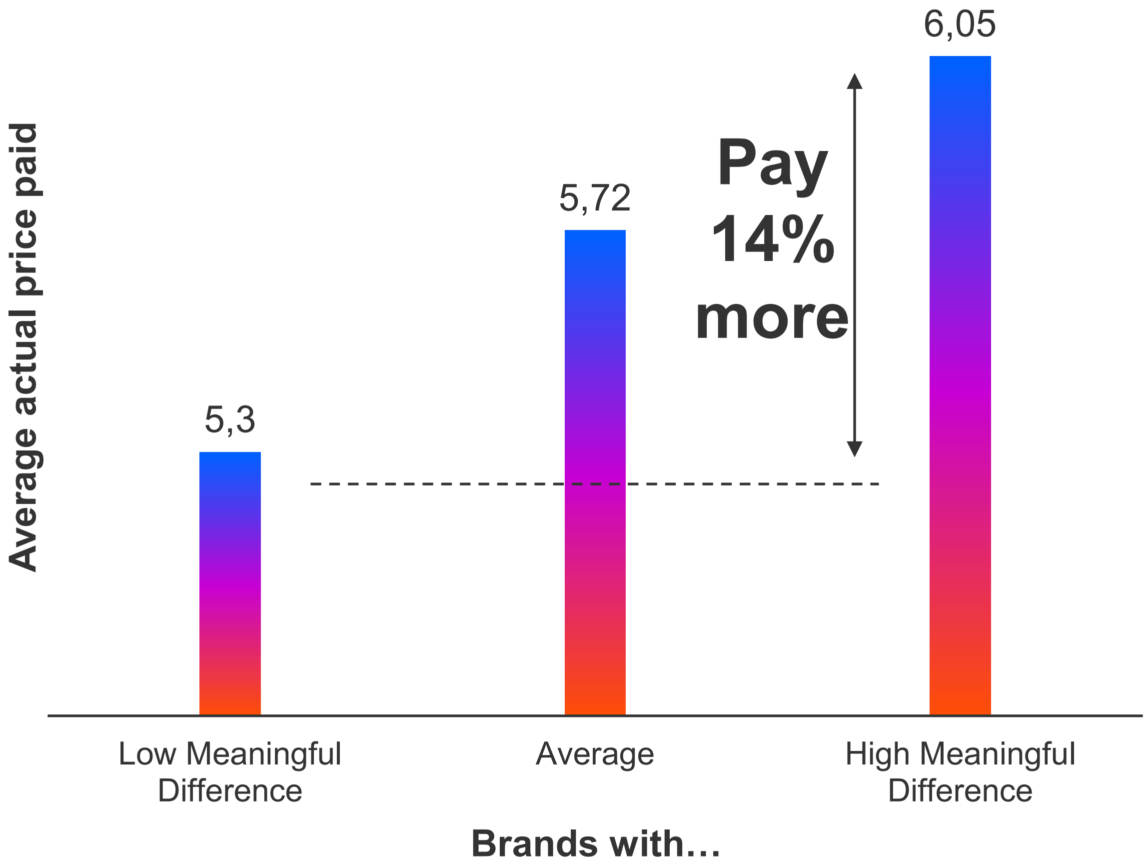
Brand shopping behaviour "More than last year"

2022 | 2023 | 2024 | 2025



Base n=601Total connected South Africans
PB1 Thinking about your shopping habits, in comparison to last year, do you...

Because we spend more on brands that we believe are "meaningfully different"



Kantar BrandZ meta analysis, 2024

ONLINE CAPTURES OUR NATION.

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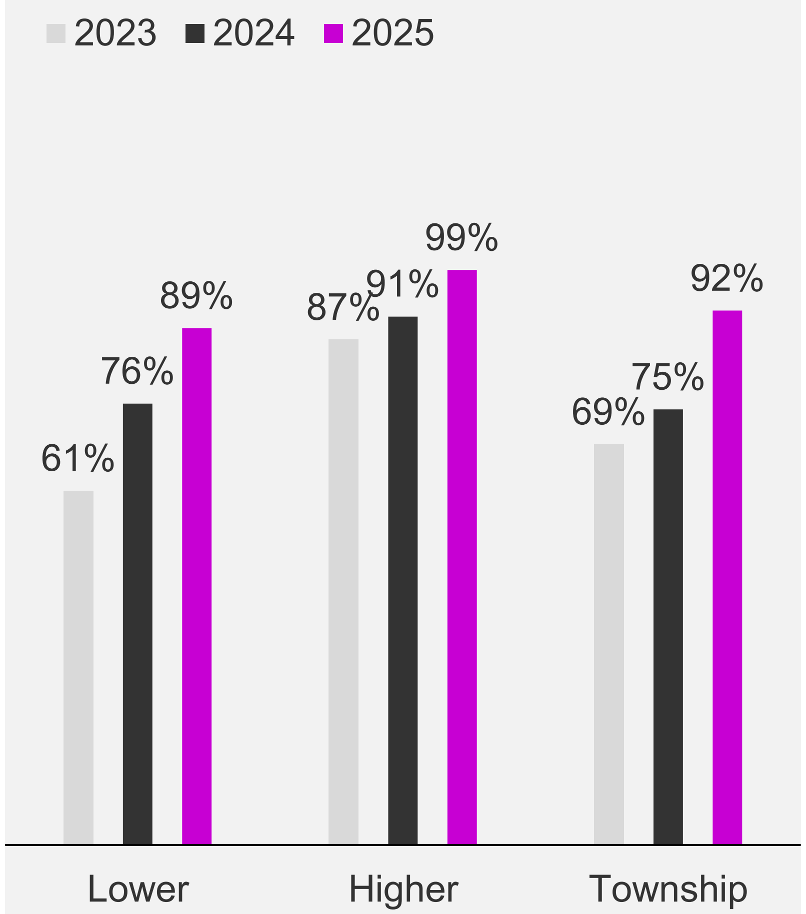
Increasing momentum behind online shopping

Ever shopped online is up from 82% in 2024

Online shopping

Ever shopped online | Don't shop online

Ever shopped online



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Base n=601 Total connected South Africans
PB2 Which of these applies to you with regard to shopping online?

And a look at how things are going with Takealot's Township Development Plan

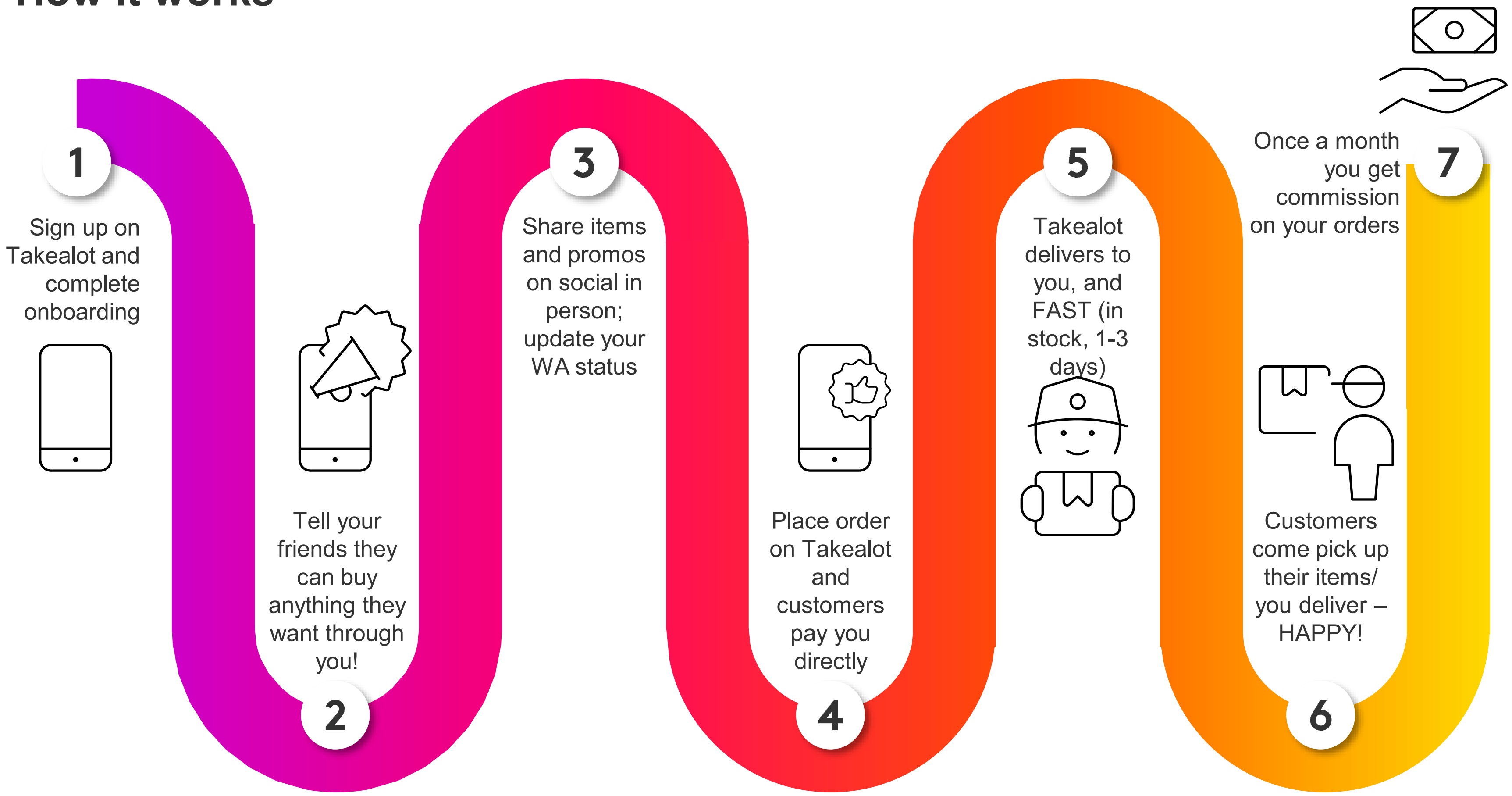
3,500 active Takealot Personal Shoppers in SA

Sign-up process: Recruit from customer base residing in low-income areas

Criteria include:

- Access to stable internet and cellphone
- Member of large community groups
- Reside in township or rural area
- Entrepreneurial experience
- No criminal record

How it works



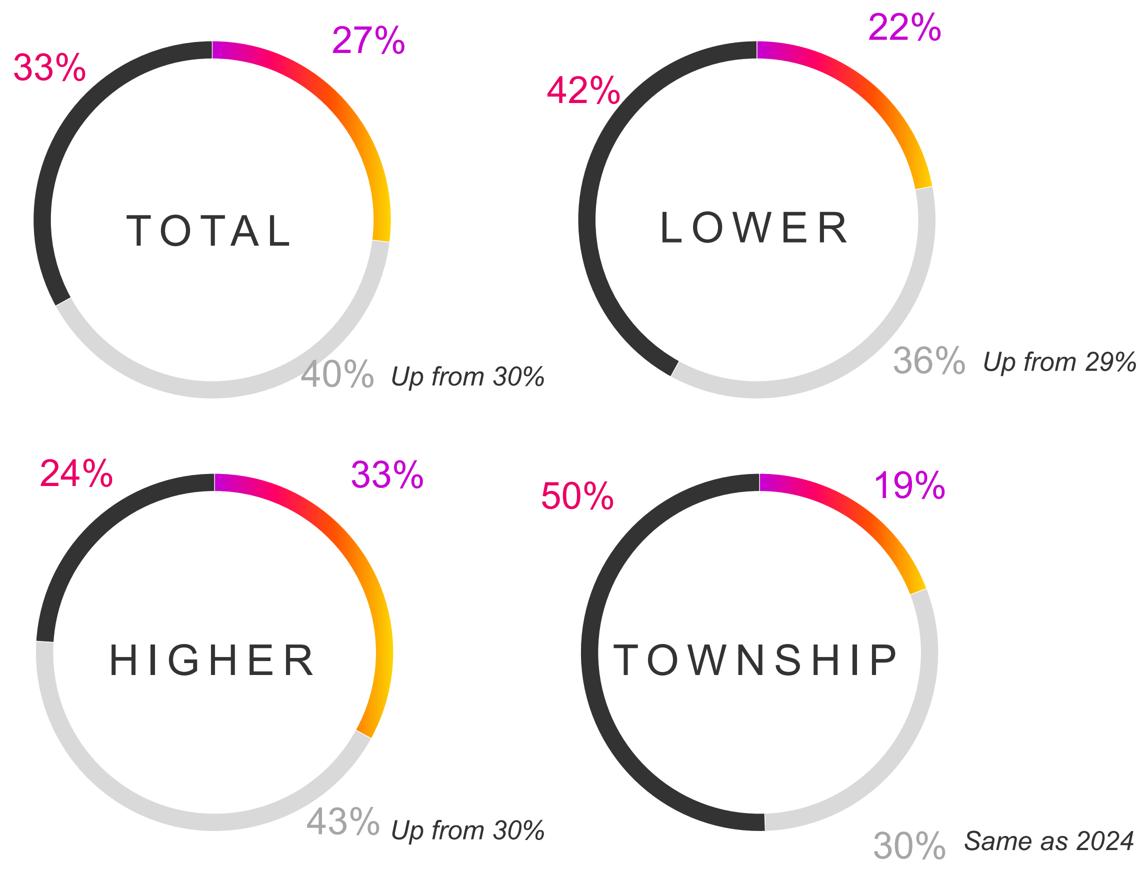
Catch our Future Proof Mzansi podcast episode with Takealot

South Africans are increasingly becoming dual channel shoppers

Greater dual channel shopping (30% to 40% this year)

Online vs in-store shopping

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



↑ More this year than last

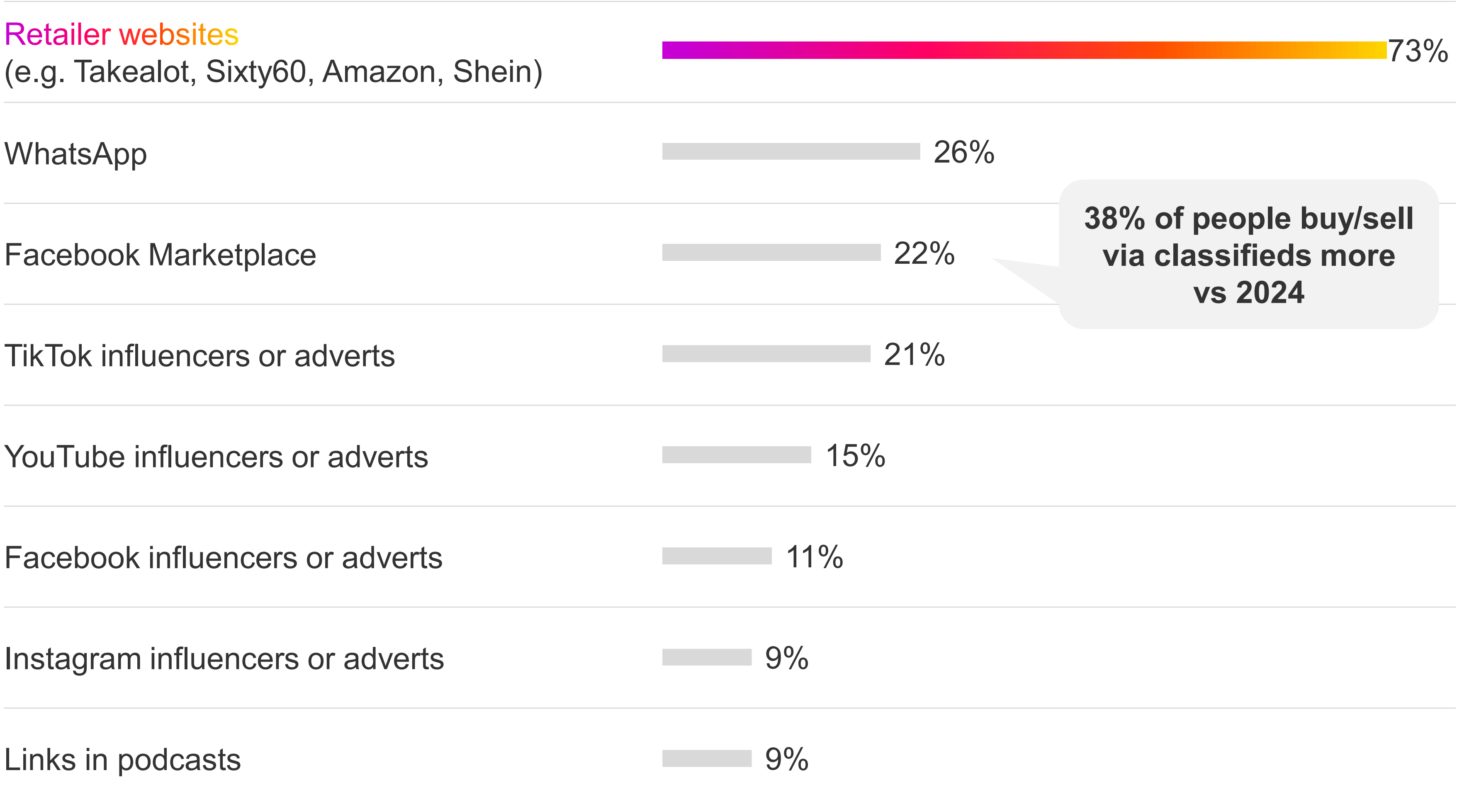
Base n=601 Total connected South Africans
PB6 On average how much of your total monthly purchases are done online vs in-store? Would you say you generally shop…?

And are well versed in the use of ecommerce websites

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

36% of people are shopping via social platforms more than they did last year

Online platforms



Base n=601 Total connected South Africans
PB 5 Which of these platforms do you use when shopping online?

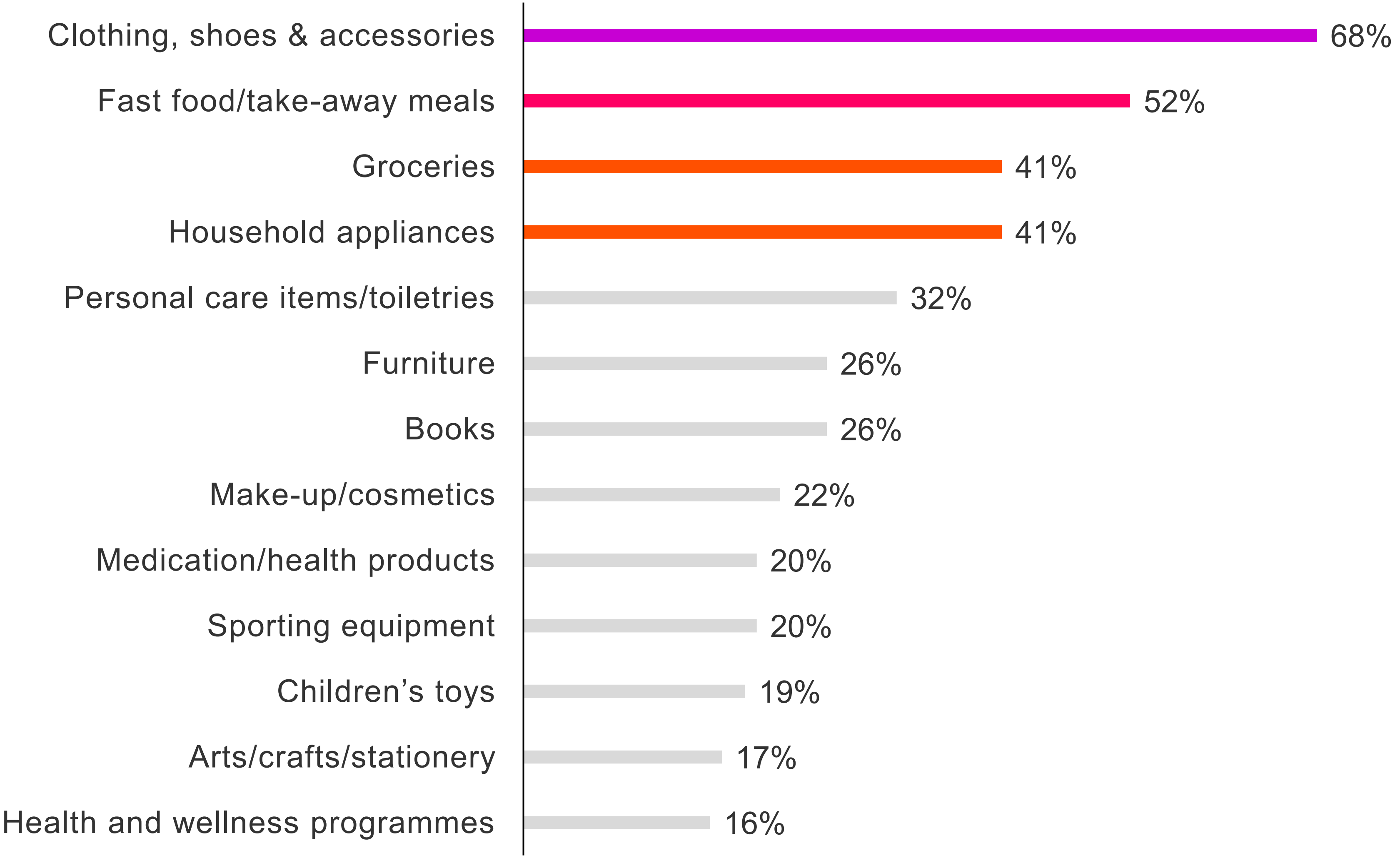
Clothing and takeaways are the top categories purchased online

Rush hours and discounted delivery options

Three-quarters of adults would consider a daily special or combo price promotion for takeaway rather than full-service restaurant

Kantar Restaurant Dive global report, 2025

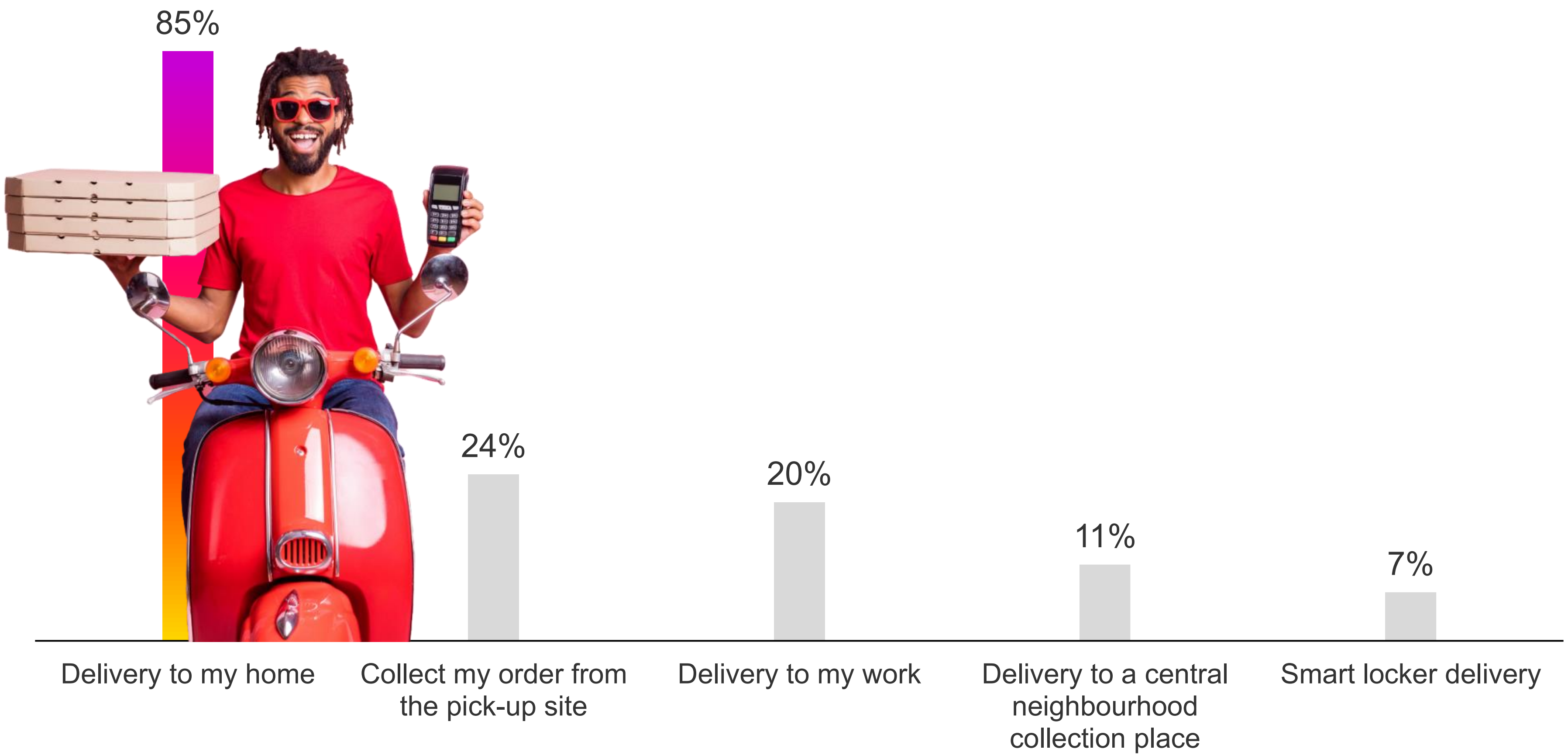
Categories shopped online



Base n=601 Total connected South Africans
OSC Which of these do you shop for online?
Kantar, Restaurant Dive, National Restaurant Association, global 2025

Online orders are generally delivered to our homes

Delivery of online orders



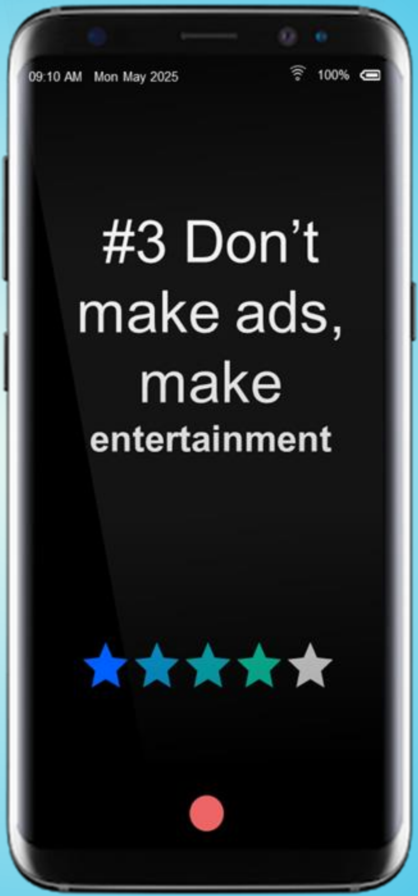
Base n=601 Total connected South Africans
OSD And how do you get delivery of the products you order online?

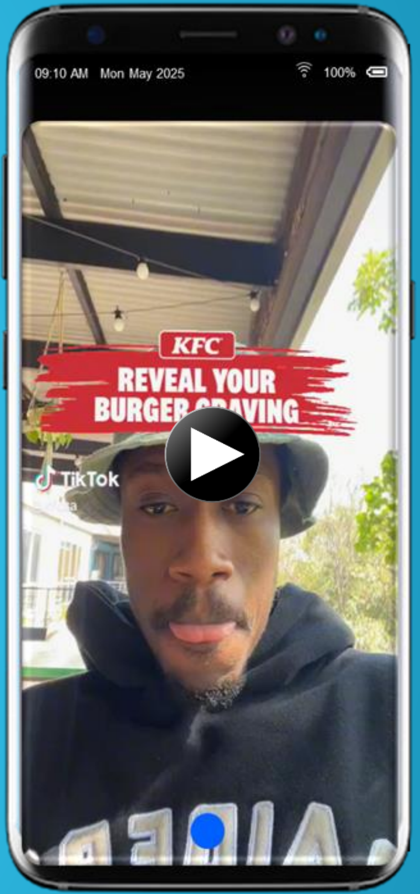
THE FATE OF OUR NATION.

1.

CREATE ENTERTAINMENT

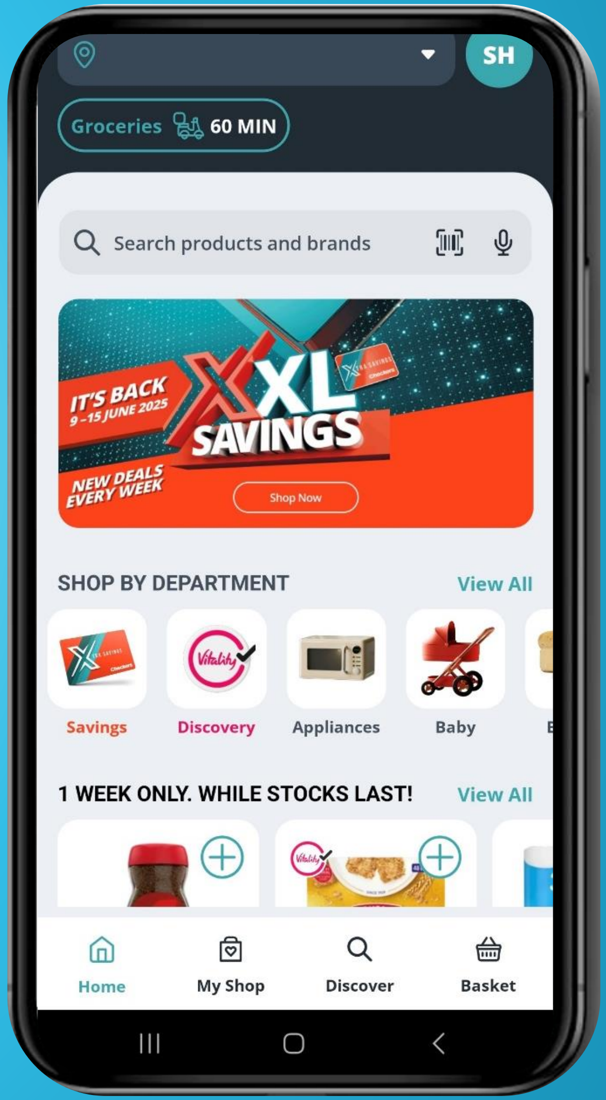
(Not ads)





2.

FIT SEAMLESSLY INTO OUR LIVES



3.

BE A PART OF THE NATIONAL SOLUTION

Start-ups and entrepreneurs are flying in this space

The social and societal issues that impact South Africans are top of mind, and business is expected to help solve them

42% Don't see brands taking a stand in support of social issues

Top sustainability concerns in SA

- Poverty
- Abuse or violence against women
- Lack of jobs with a sufficient wage
- Water pollution
- Diversity and inclusion
- Climate change

"Understanding consumer sentiment to navigate the tariff turmoil"

Tariffs and trade wars, and the resultant economic uncertainty, influence consumer behaviour, attitudes and expectations, making it more important than ever for brands to check the pulse of consumer sentiment to guide their decision making.

Learn more in Kantar's recent Global Consumer Sentiment Barometer, covering 20 countries including South Africa.

Catch Ronak's talk in the webinar

Ronak Gopaldas

Director, Signal Risk, Political Economist & Visiting Fellow at the London School of Economics

KANTAR MZANSI BAROMETER

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APPENDIX

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Available on Spotify, Apple Podcast and YouTube

Hosted by
Stacy Saggers & Senamile Zungu

https://www.kantar.com/campaigns/future-proof-mzansi

FUTURE PROOF MZANSI

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Catch our Future Proof Mzansi podcast with Donald Moghale

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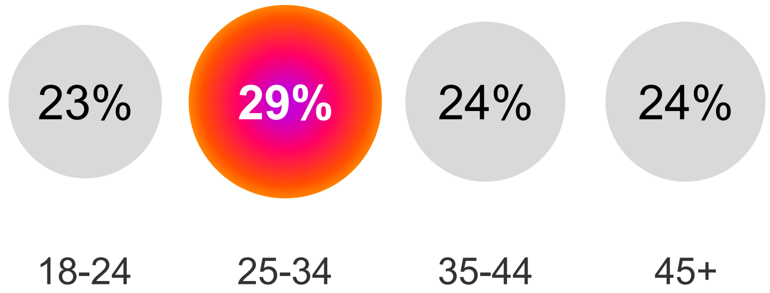
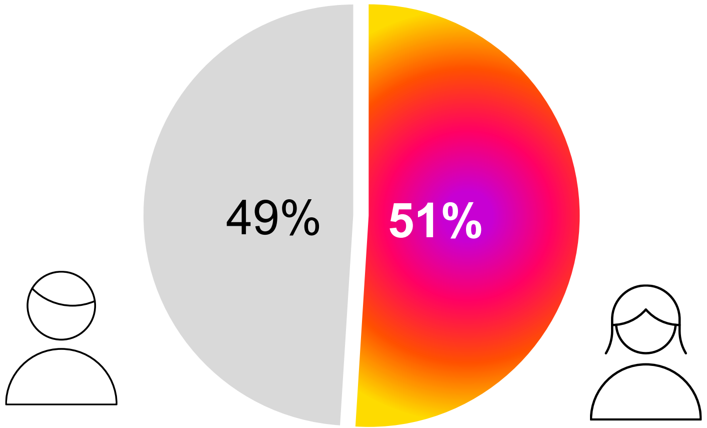
We spoke to 501 South Africans

representative of the connected* population of South Africa

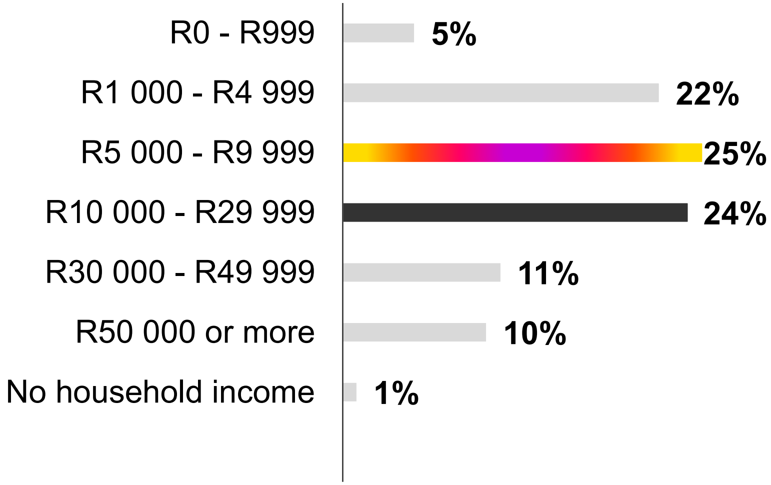
Age



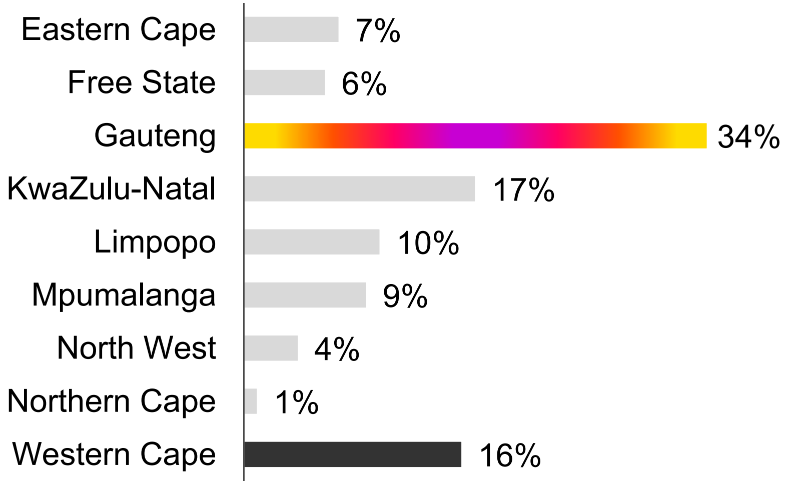
Gender



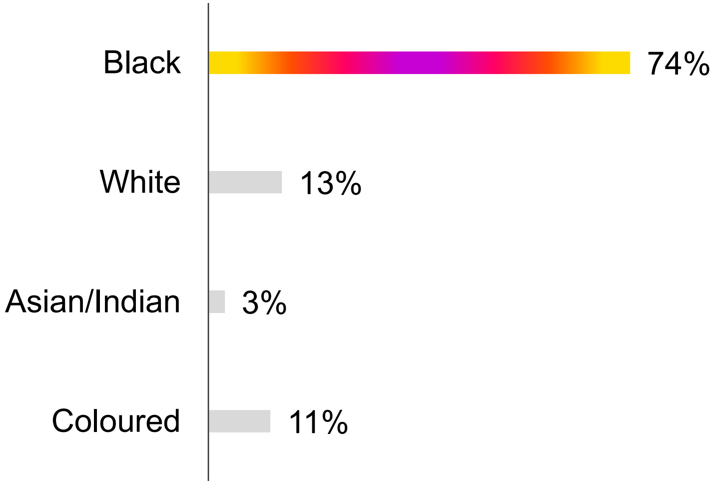
Household income



Region/province



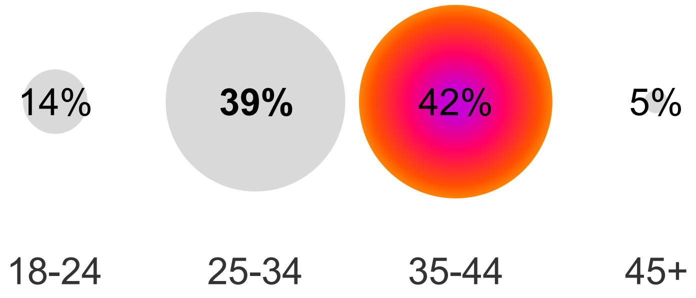
Ethnicity



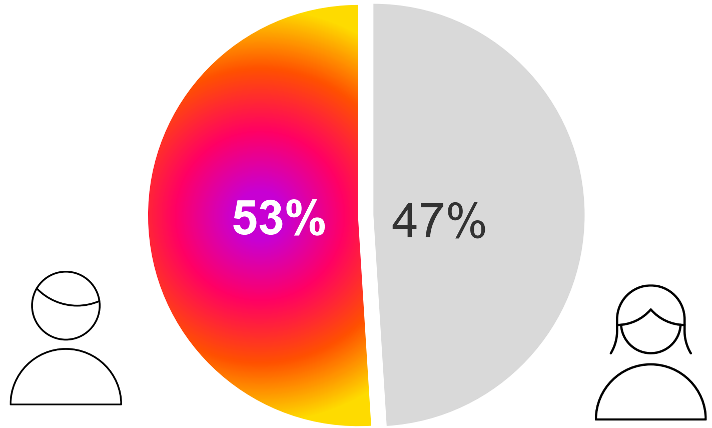
*72% penetration of internet access in SA across home and mobile, MAPS 2022
Base n=415 Total sample connected South Africans, March 24

We spoke to 113 township-based South Africans

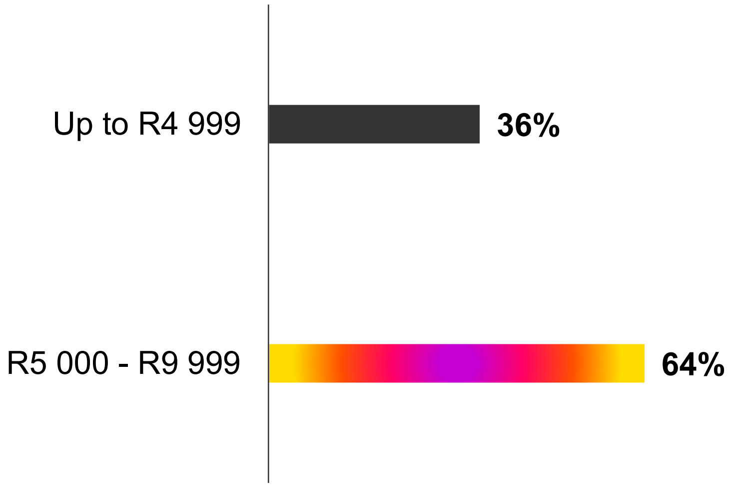
Age



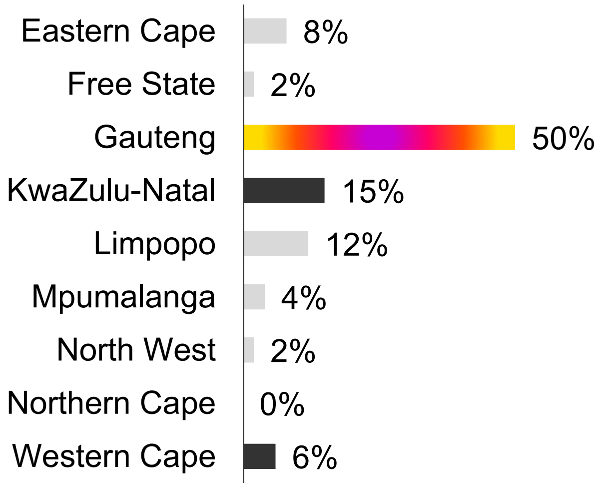
Gender



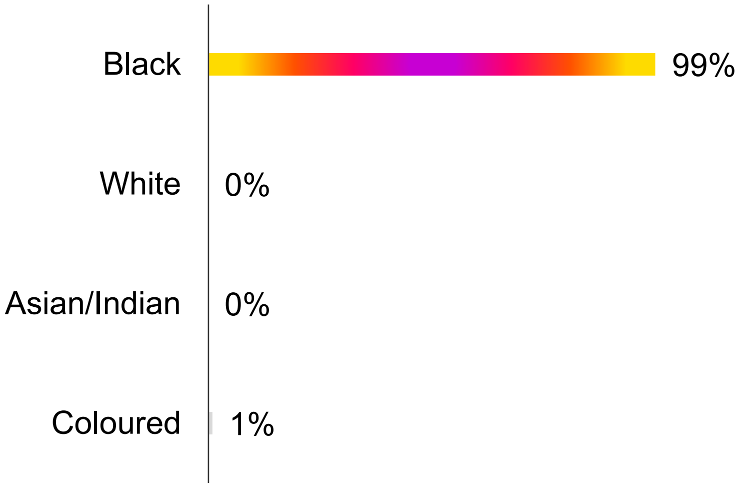
Household income



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

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)