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Managing Director, East Africa
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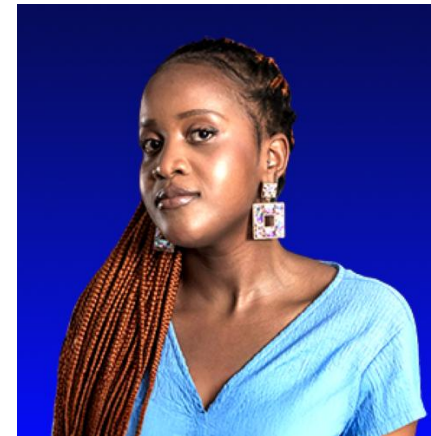
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Kantar



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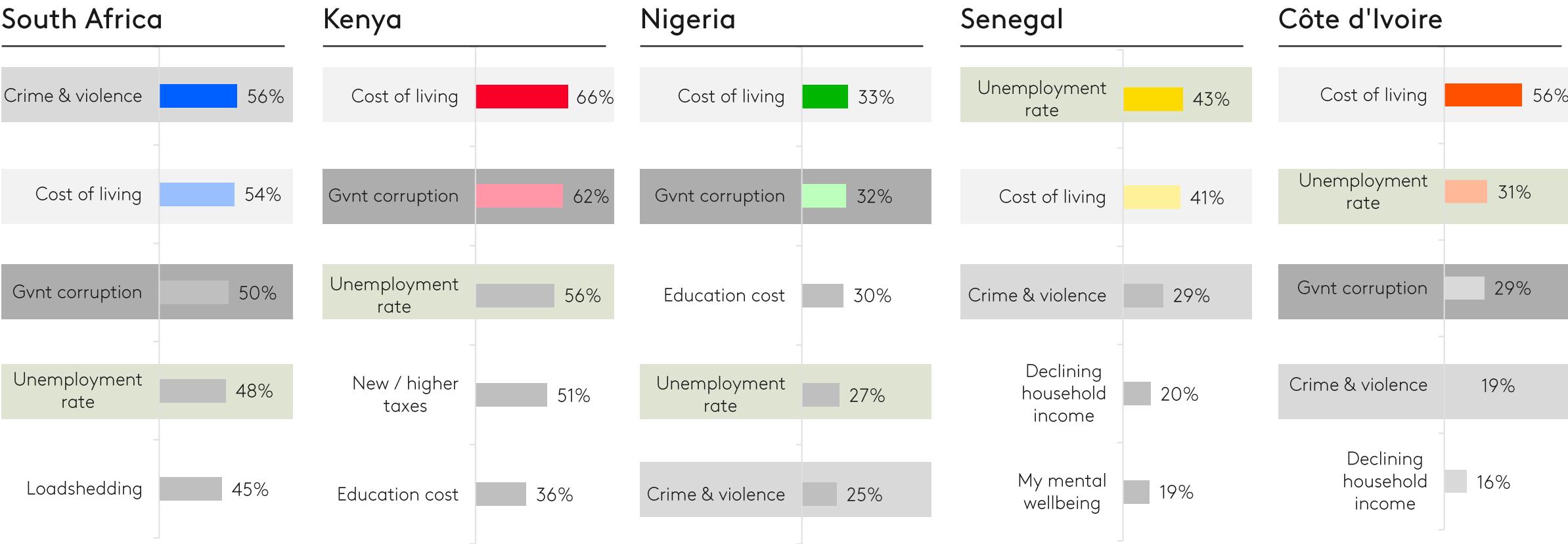
Mary Kawira
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THE STATE OF OUR NATIONS



Top five biggest concerns

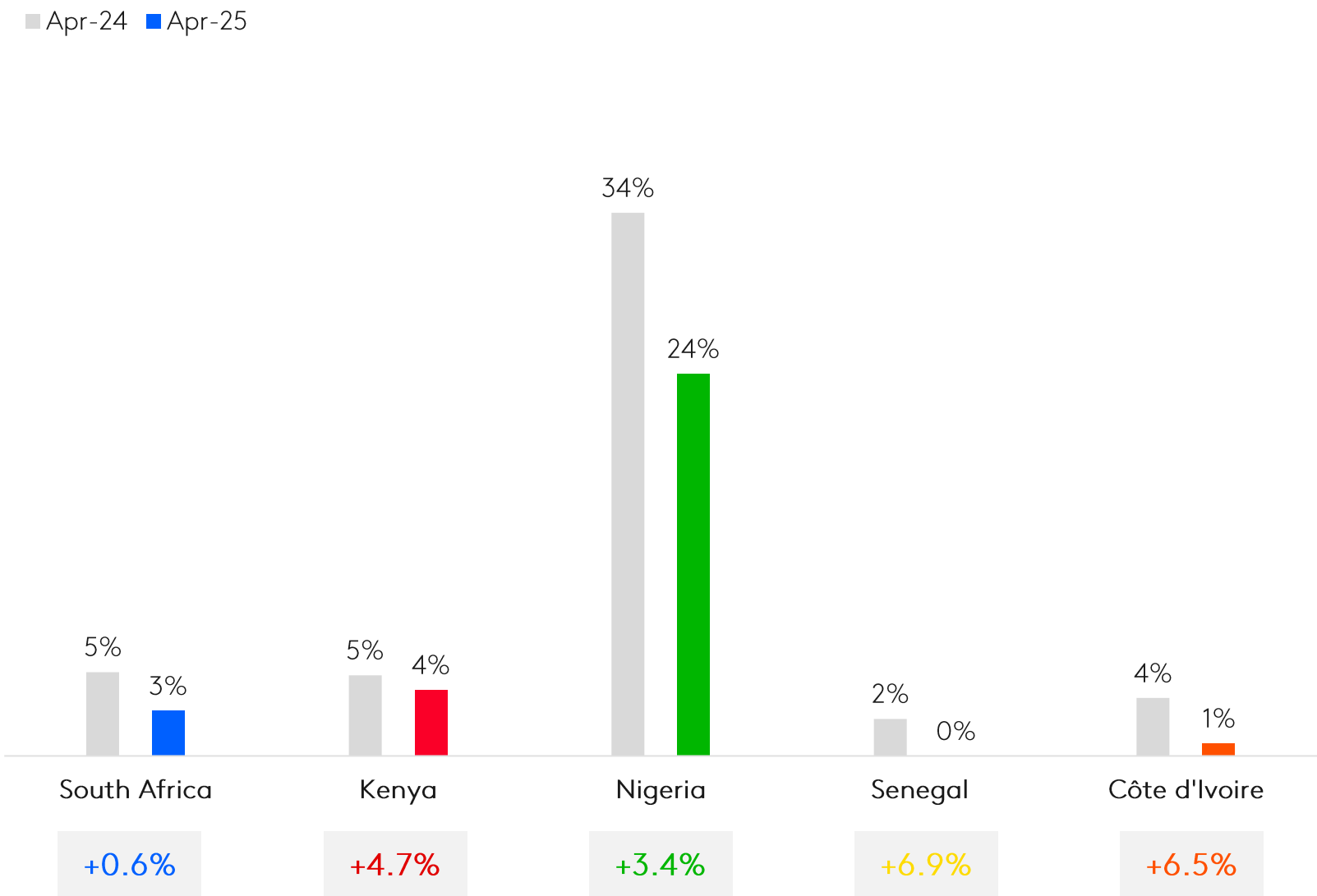
Cost of living, unemployment, government corruption, crime and violence



Inflation continues to ease in all markets, but consumer prices remain high, and incomes have yet to catch up, meaning consumer purchasing power continues to erode

Annual Inflation Rate measures price changes across a basket of consumer goods vs the same month in the previous year.

Annual Inflation Rate (April'24 vs April'25)



With the result that a significant portion of consumers cannot meet their basic expenses, particularly in Nigeria

...with a significant proportion of respondents unable to meet their basic expenses.

Cost of living severity

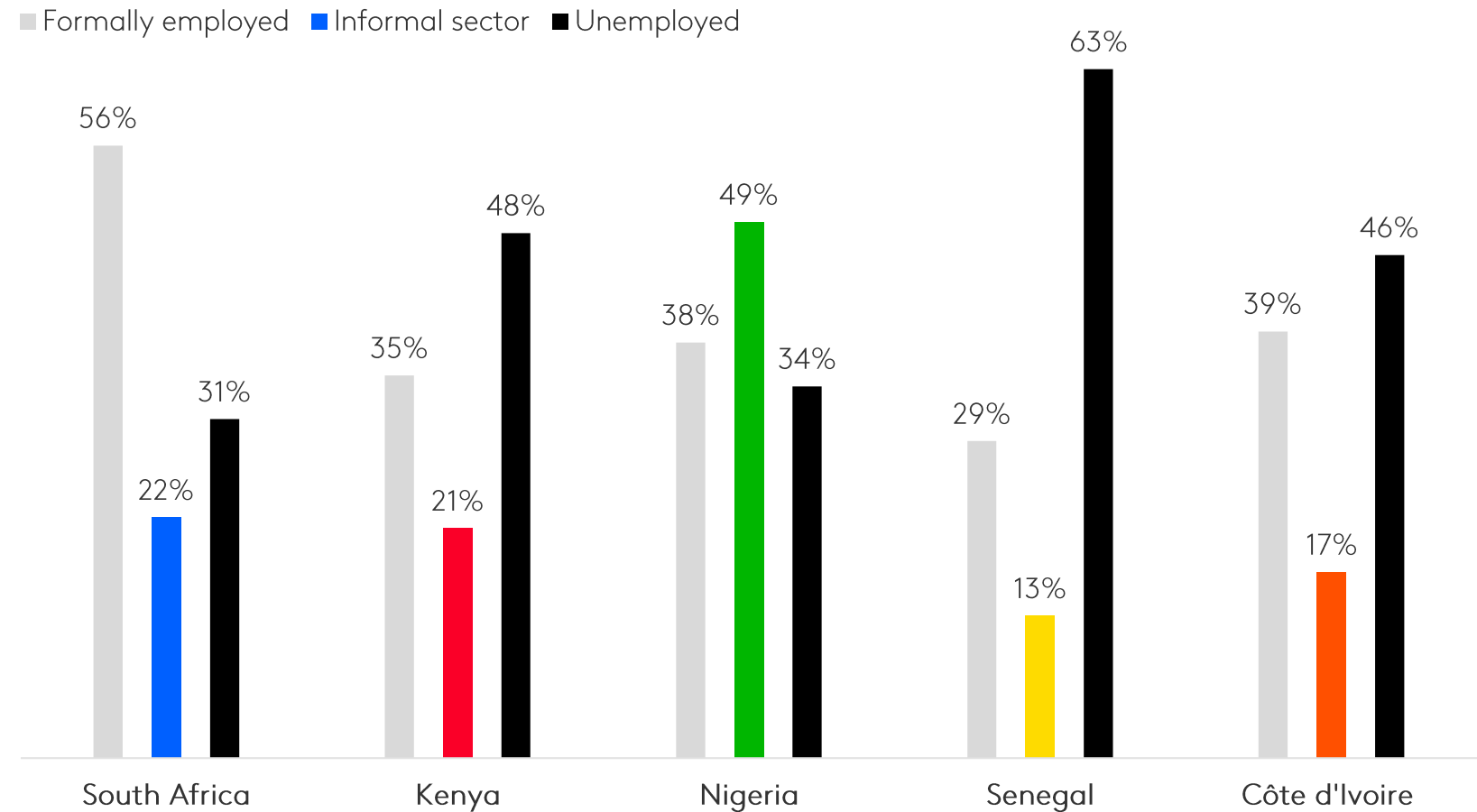
	South Africa	Kenya	Nigeria	Senegal	Côte d'Ivoire
We have enough that we're not stressed about covering our household expenses	43%	25%	21%	28%	31%
It's difficult to pay our household expenses but we're managing	36%	48%	27%	55%	55%
We have food but are not managing to pay other household expenses	18%	23%	35%	13%	12%
We're hungry and don't know where our next meal is coming from	3%	4%	17%	4%	3%

Outside of South Africa, only a quarter of Africans are formally employed, with high unemployment across markets; Nigerians lean into self-employment

The Language of Work:
Chomage vs Travail in West Africa...

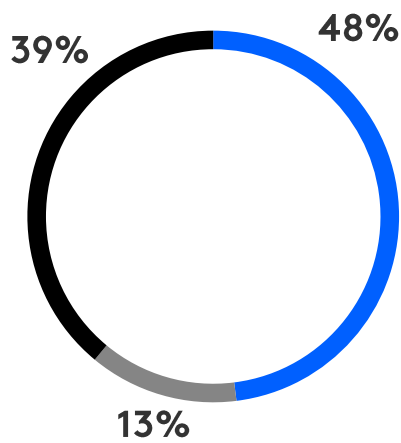
A multiple mention question given that many consumers generate income across formal employment and own income

Employment status

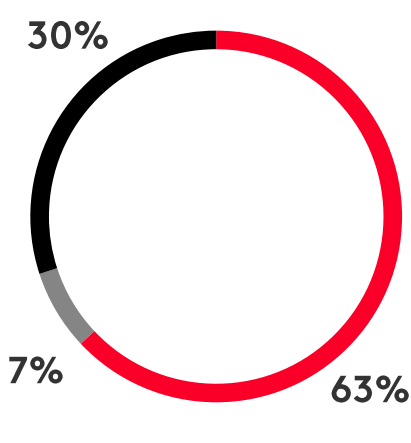


Despite these significant challenges, the majority are optimistic about the country over the next five years

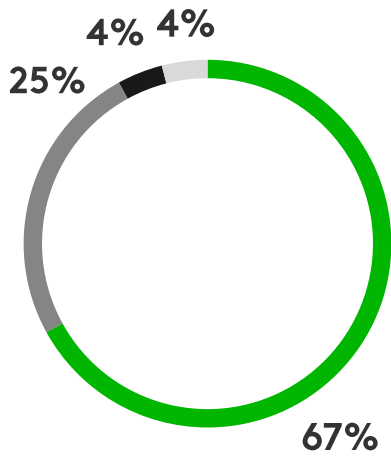
South Africa



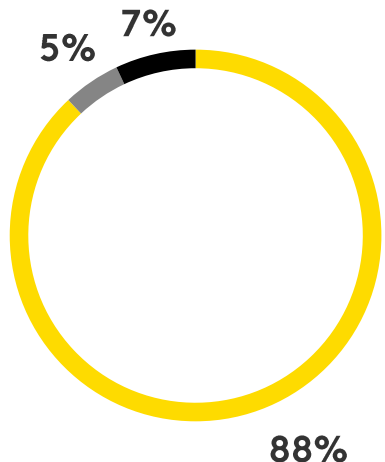
Kenya



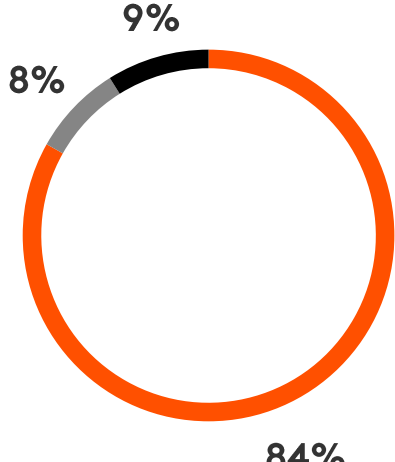
Nigeria



Senegal

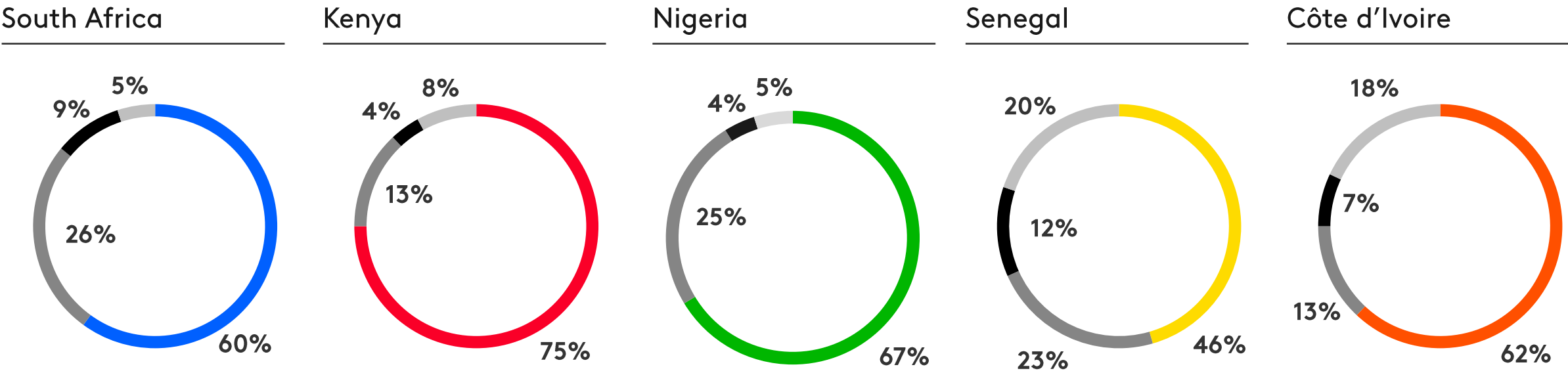


Côte d'Ivoire



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

And the majority are also optimistic about their future household financial position



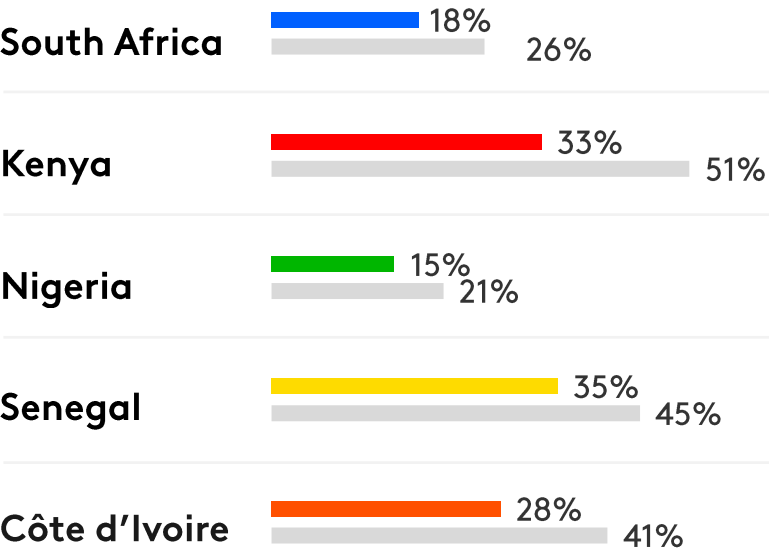
Better off financially | About the same | Worse off financially | Don't know

Lower social economic groups are less likely to have a positive future financial outlook.
Proportion of lower social economic group who mentioned they are better off financially in the future >> South Africa 49% | Kenya 68% | Nigeria 60% | Senegal 38% | Côte d'Ivoire 55%

Gen Z: Frustrated but fired up

Africa’s youth are ready to work, and demanding their leaders provide dignified jobs and a sustainable future

Despite challenges, Gen Z remains optimistic: they over-index on ‘Actively seeking employment, hopeful about finding a job’ across all markets.



Across Africa, Gen Z is increasingly disillusioned with political systems and leadership.

Youth-led movements are gaining momentum across the continent:

- Youth demand accountability and job creation.
- Protests against tax hikes and economic hardship.
- #EndSARS legacy continues to fuel youth civic activism.
- Young voters more engaged in 2024 elections than ever before.
- Young people are demanding accountability and change.



Brands are stepping up
to support the creator
content economy

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



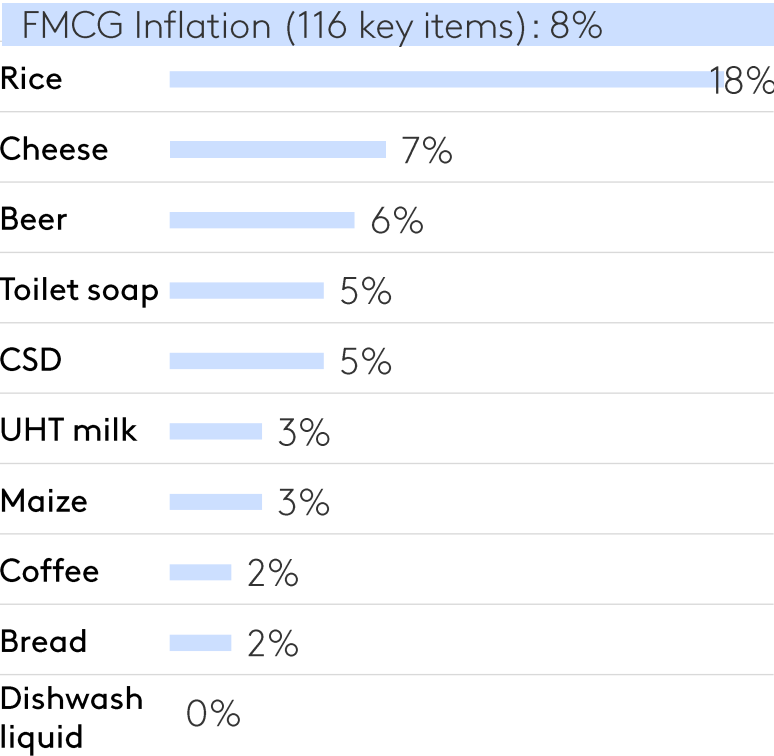
THE PLATE OF OUR NATIONS



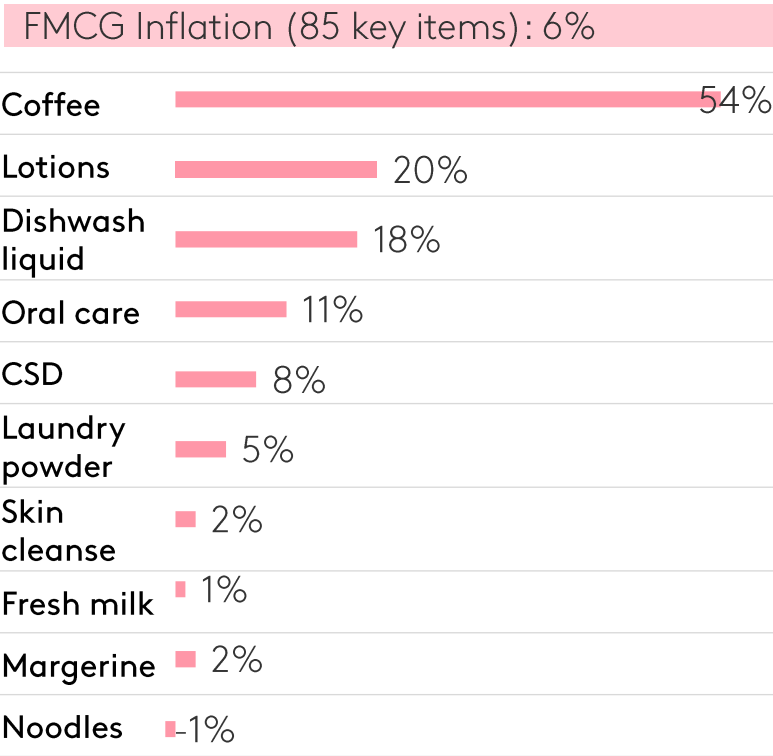
Consumer inflation increases ahead of the FMCG basket

Ave price p/volume
12 MM Dec 2024
CPI H1 2025: 3-5%

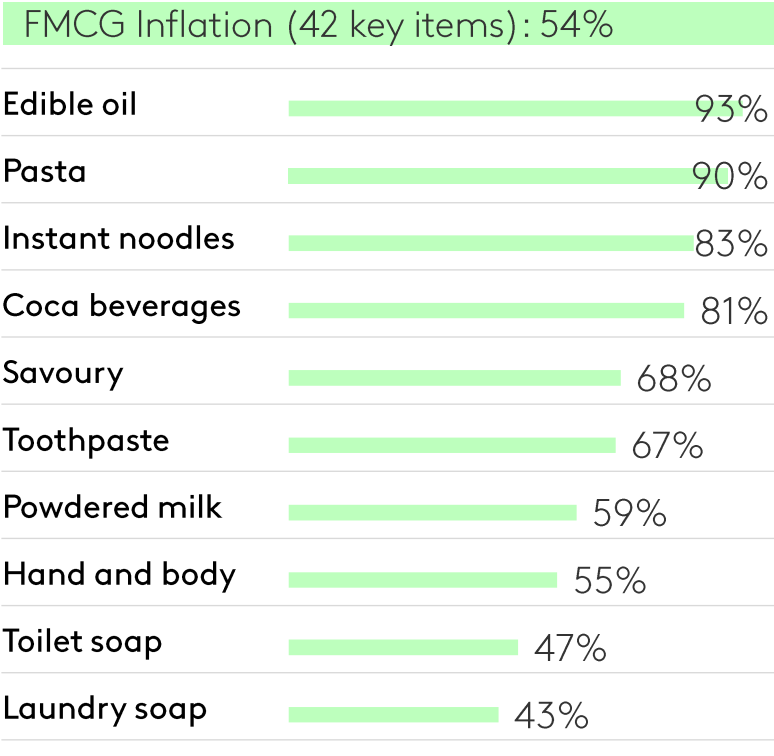
South Africa
CPI H1 2025: 3-5%



Kenya
CPI H1 2025: 3-5%

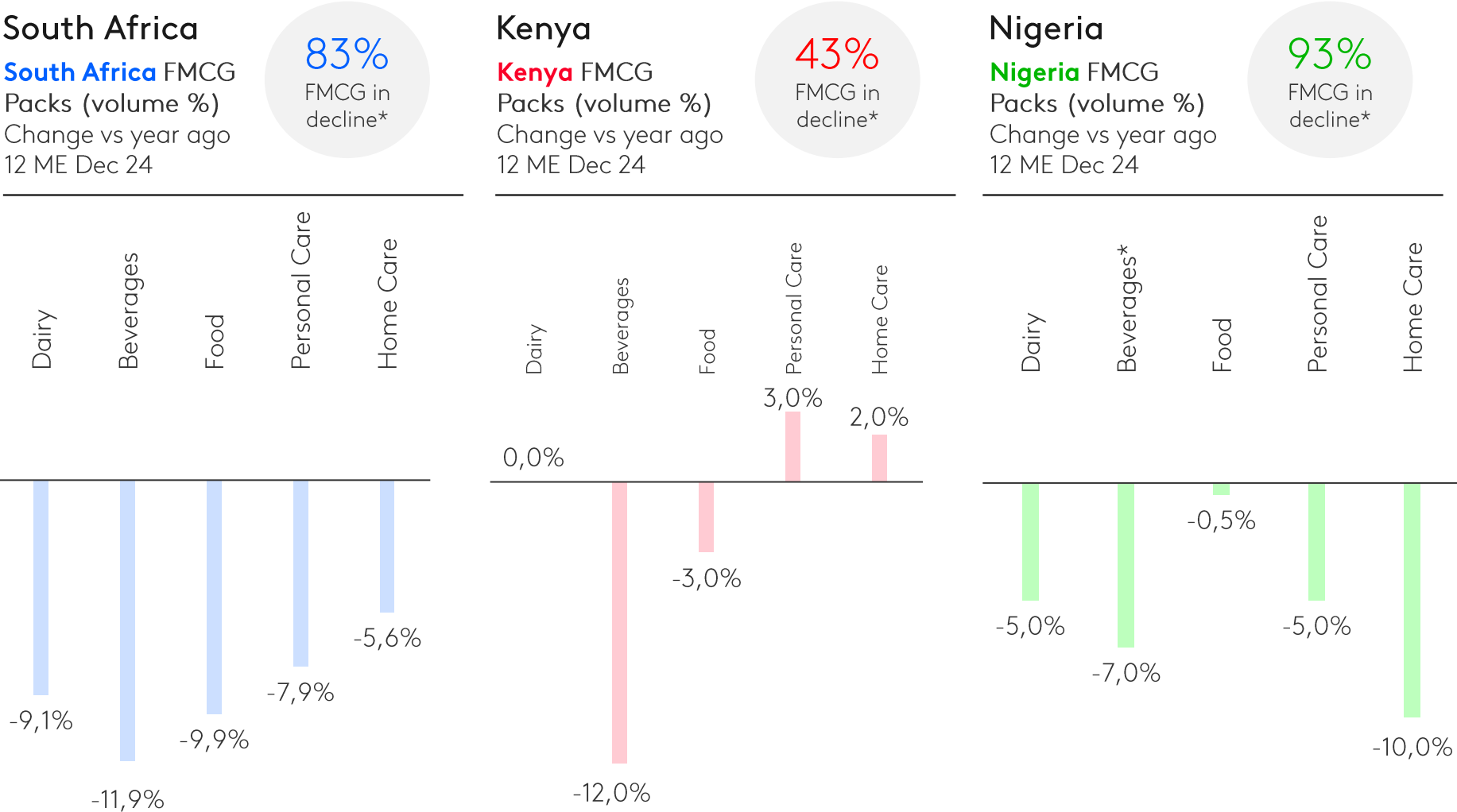


Nigeria
CPI H1 2024: 22-24%



With the result that consumers are struggling to afford groceries; they are paying more and getting less

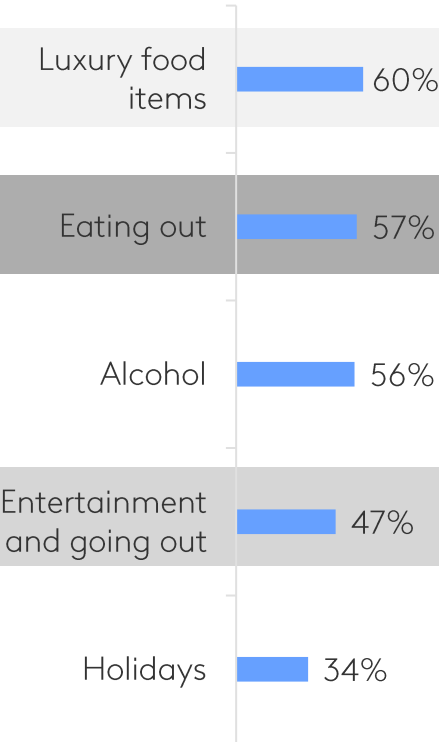
FMCG
Packs (volume %)
Change 12 ME Dec 24



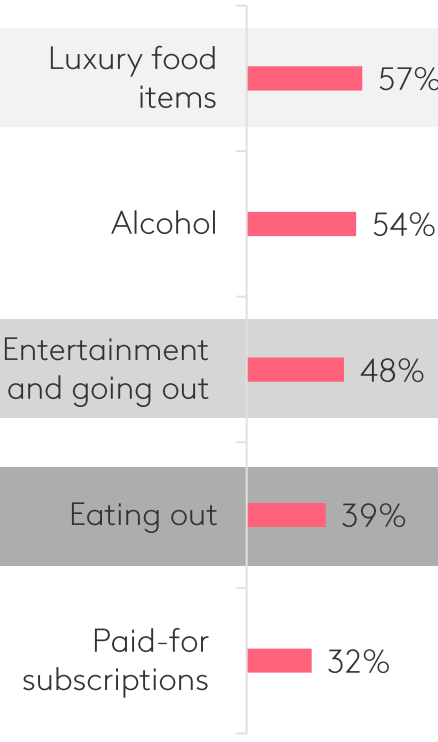
* Beverages in Kenya and Nigeria exclude Alcohol, Beverages in SA includes Alcohol
Kantar Worldpanel, Full Year 2024

To manage, we are “doing less” buying luxury food items, eating out and out-of-home entertainment

South Africa



Kenya



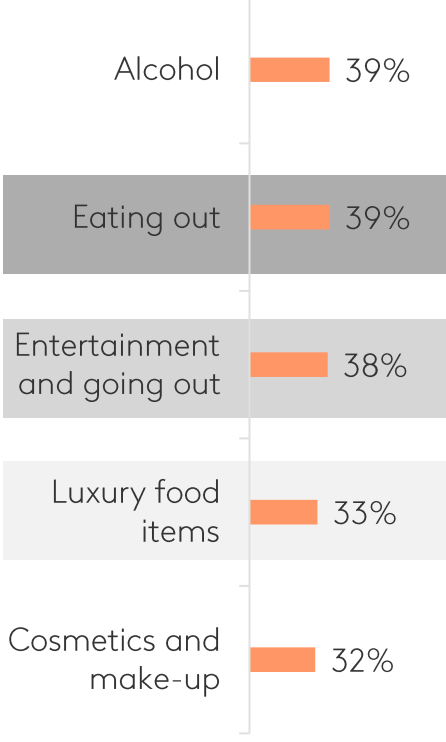
Nigeria



Senegal

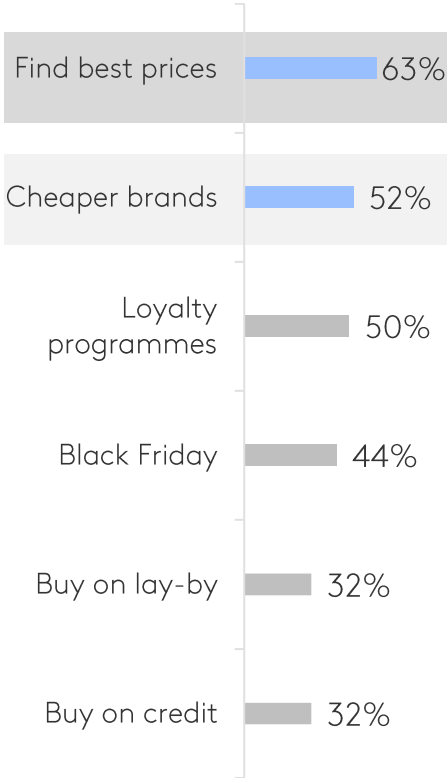


Côte d'Ivoire



“Doing more of” finding ways to stretch the budget, especially seeking best prices and cheaper brands

South Africa



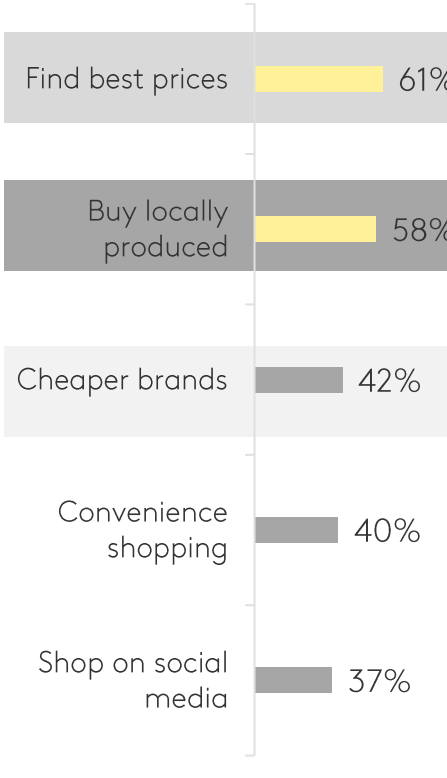
Kenya



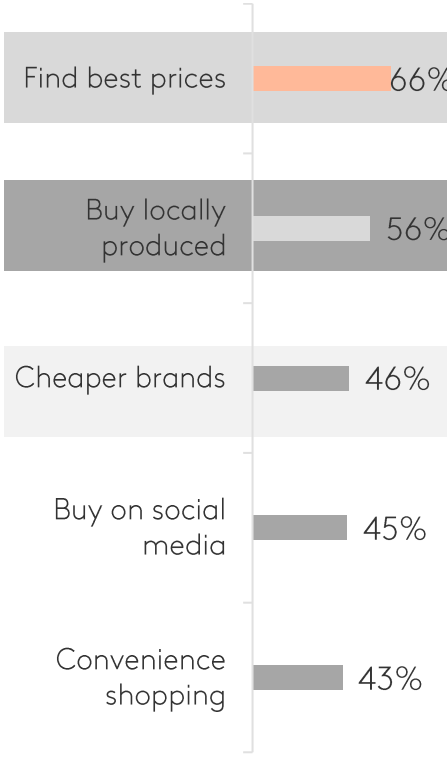
Nigeria



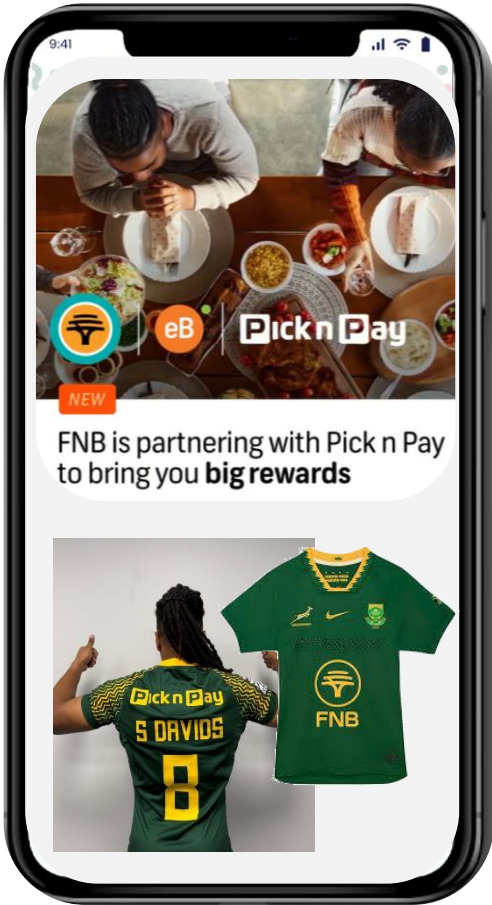
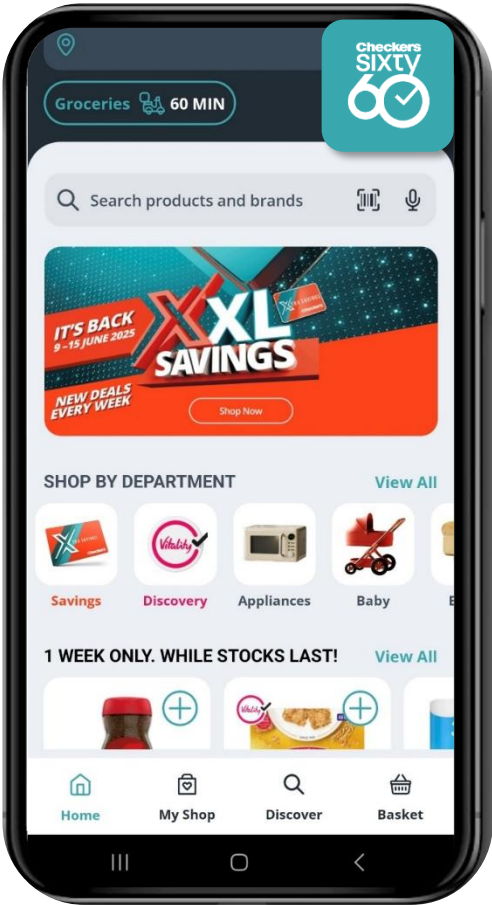
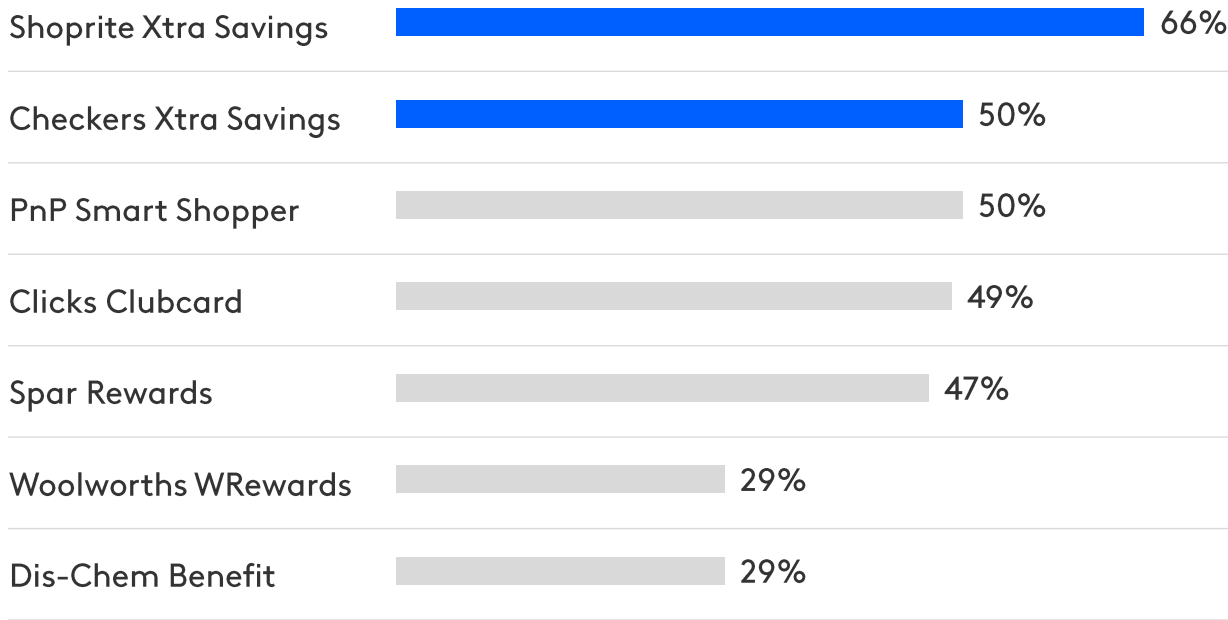
Senegal



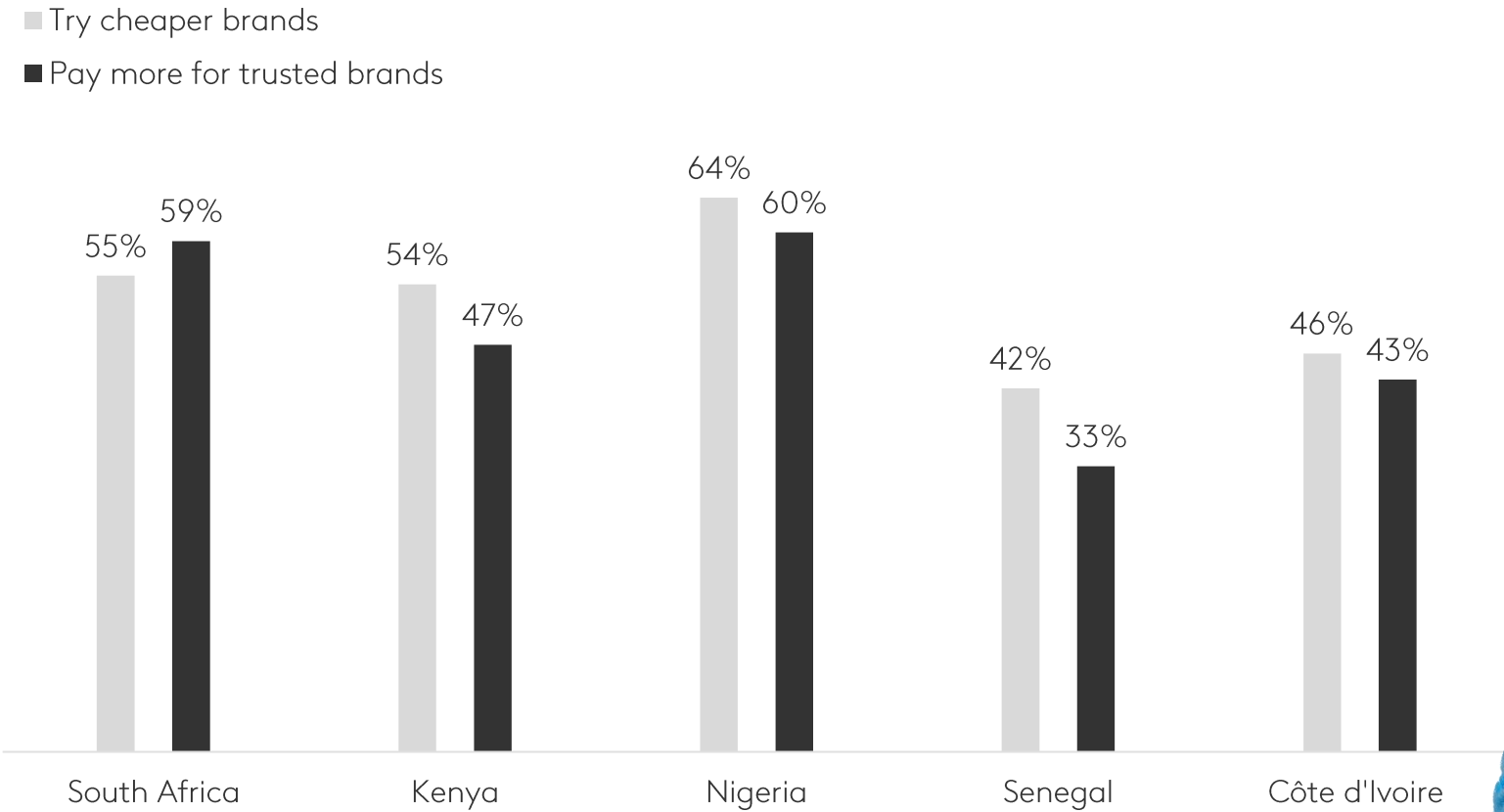
Côte d'Ivoire



In South Africa, there is high use of rewards programmes, driven by the grocery brands

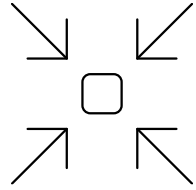


Yet even as we try out cheaper brands, we prioritise spend behind the brands that we know and trust even if they cost more



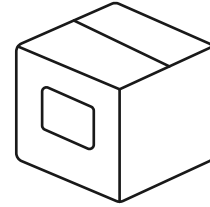
Four common consumer strategies that are pursued with budgets that are under pressure

As the value battle intensifies



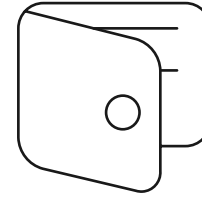
Squeeze

Rationalisation of quantity and frequency of consumption



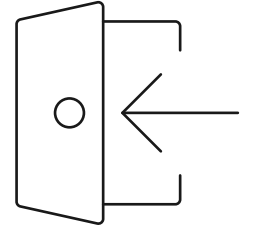
Swap

Choice of different packaging alternative



Switch

Moving to more affordable brands and categories



Scram

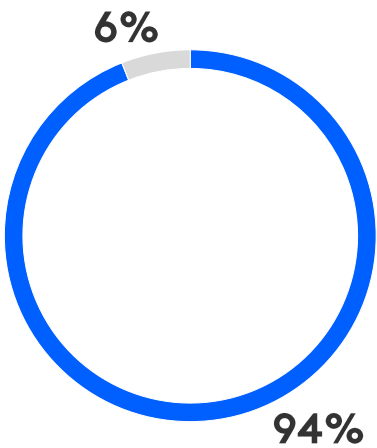
Leave the entire category for substitutes or abstain

ONLINE
CAPTURES
OUR
NATIONS

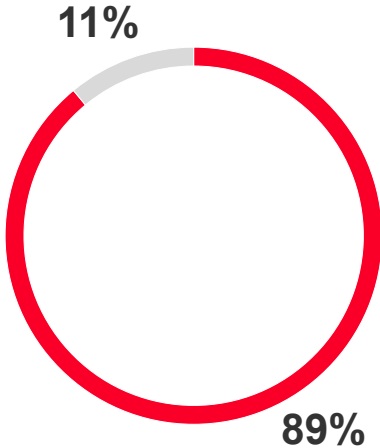


The majority of connected Africans have shopped online

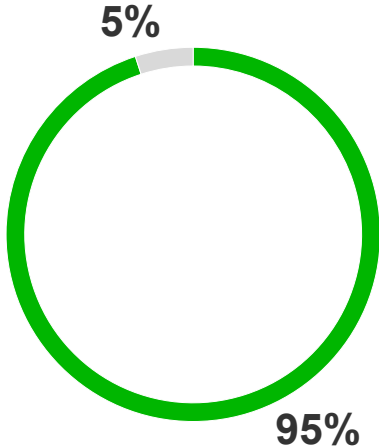
South Africa



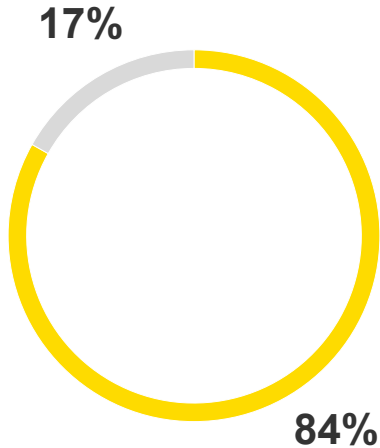
Kenya



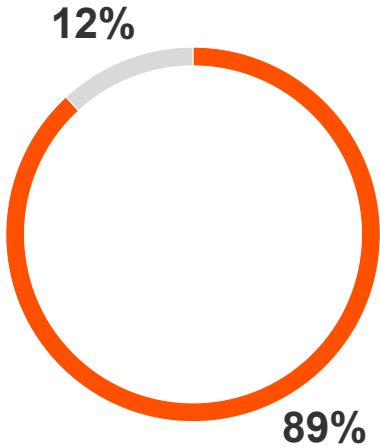
Nigeria



Senegal



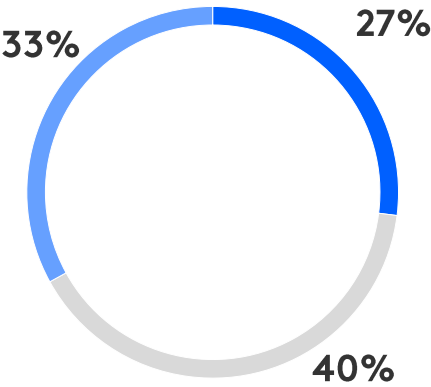
Côte d'Ivoire



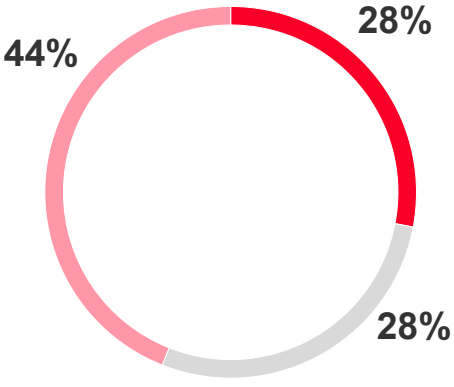
Ever shopped online | Don't shop online

High adoption of online and dual shopping, especially in Nigeria

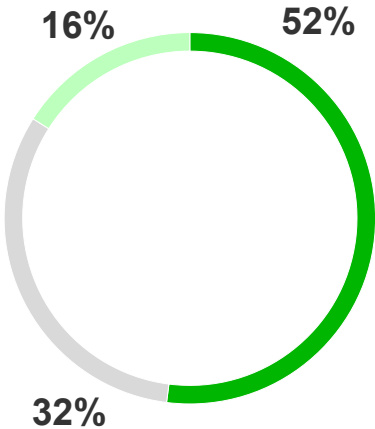
South Africa



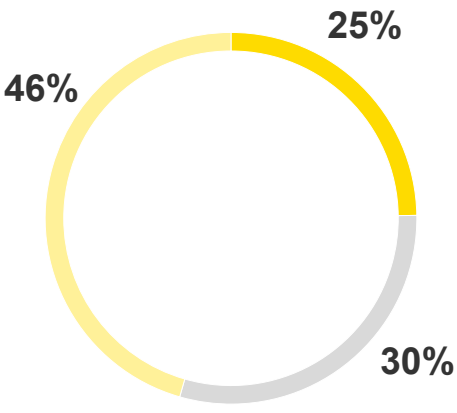
Kenya



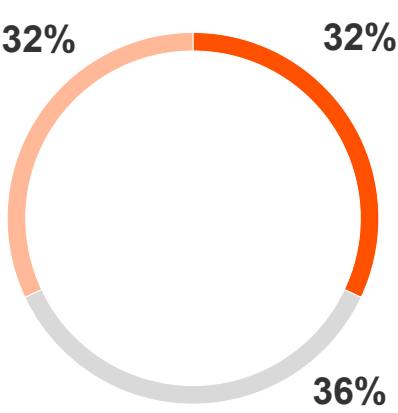
Nigeria



Senegal

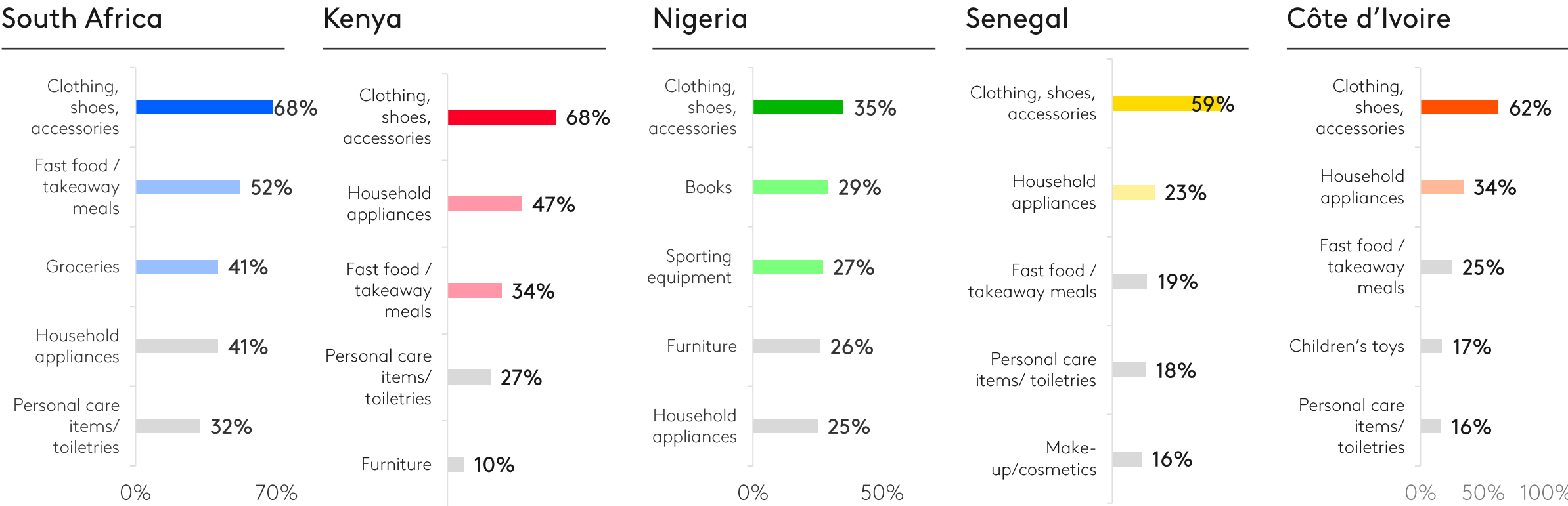


Côte d'Ivoire



[More online](#) | [About the same online and in-store](#) | [More in-store](#)

Connected Africans most often purchase clothing and accessories online, followed by household appliances and fast food



Retailer websites are key in Kenya and South Africa, while WhatsApp is the platform of choice in Nigeria, Senegal, and Côte d'Ivoire

	South Africa	Kenya	Nigeria	Senegal	Côte d'Ivoire
Retailer websites (e.g. Takealot, Jumia, Carrefour)	73%	69%	46%	43%	46%
WhatsApp	26%	34%	48%	58%	50%
Facebook Marketplace	22%	20%	39%	25%	35%
TikTok influencers or adverts	21%	19%	31%	25%	23%
YouTube influencers or adverts	15%	12%	32%	6%	6%
Facebook Influencers or adverts	11%	12%	28%	12%	16%
Instagram Influencers or adverts	9%	17%	26%	8%	8%
Links in podcasts	9%	10%	19%	2%	3%
Online classifieds (e.g. Afimarlin, Jiji)	0%	32%	28%	15%	3%

WhatsApp; the unofficial “Mall of Africa”



WhatsApp has firmly established itself as the leading online shopping platform in these markets, driven by:



The power of strong community connections

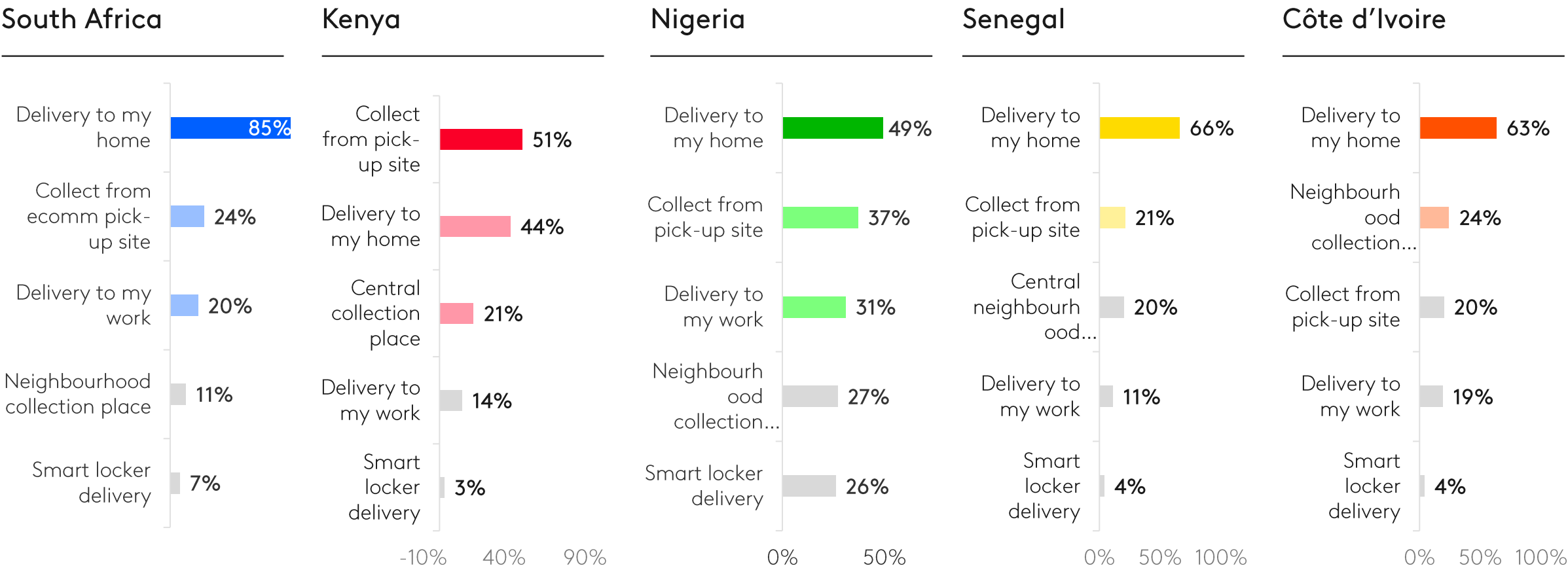


Trusted referrals from friends and family, and



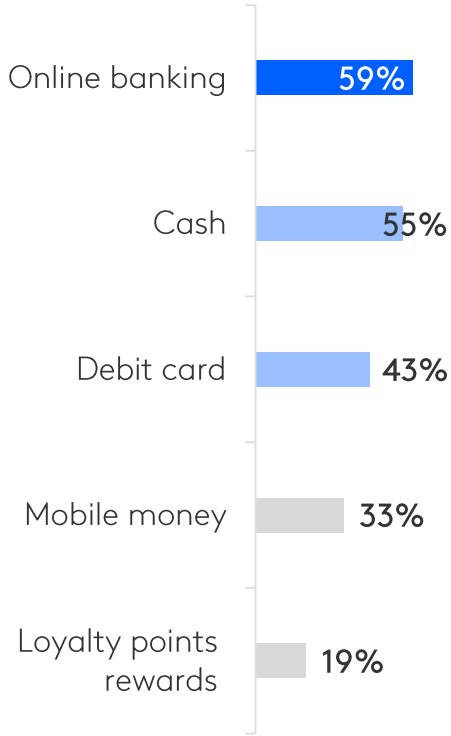
Its unmatched flexibility for handling custom orders

Home delivery is still the default, but pick-up points are catching, signaling the rise of hybrid delivery ecosystems tailored to African realities

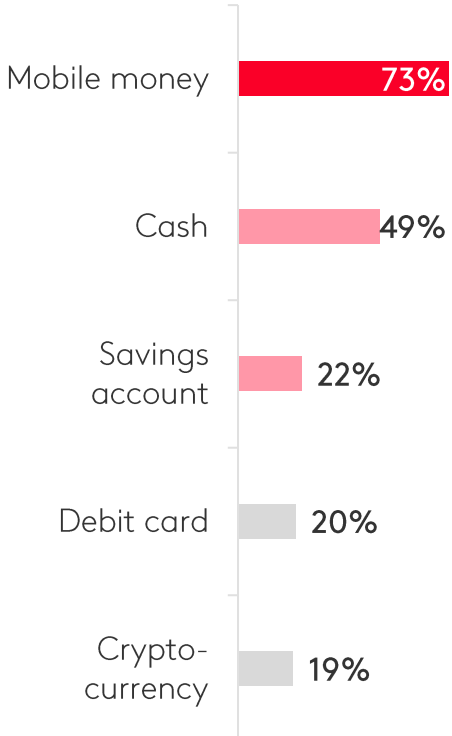


Africa's payment landscape is fragmented – electronic payments dominate, but cash remains essential

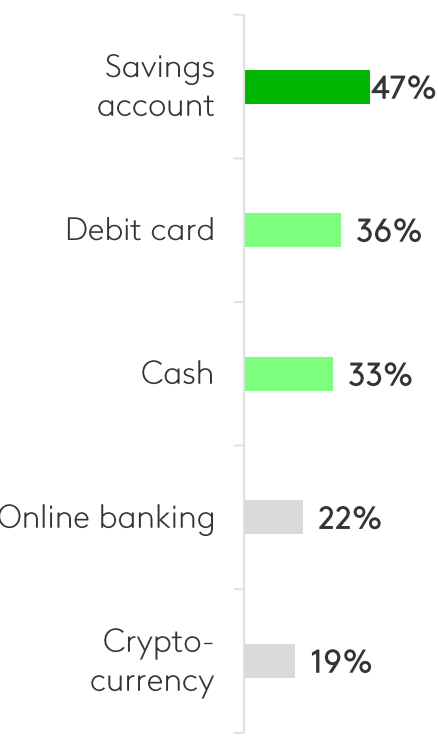
South Africa



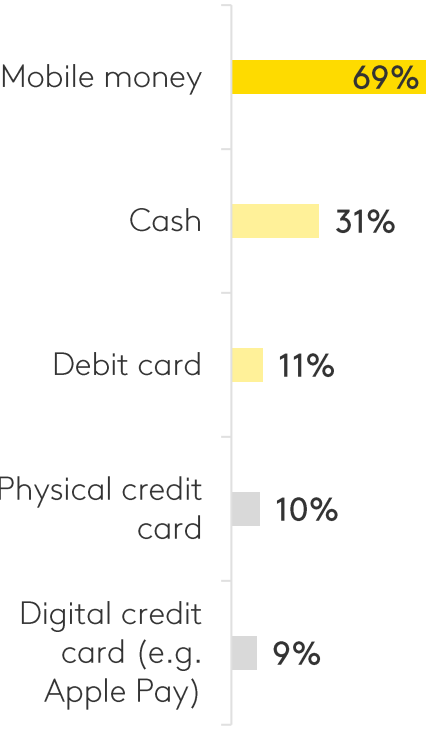
Kenya



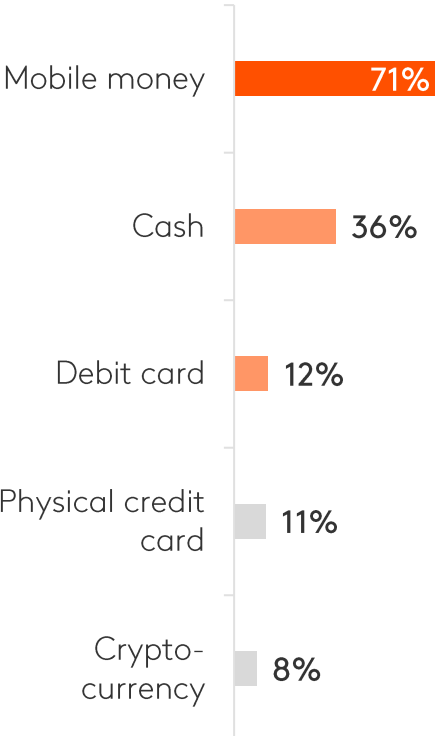
Nigeria



Senegal



Côte d'Ivoire



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

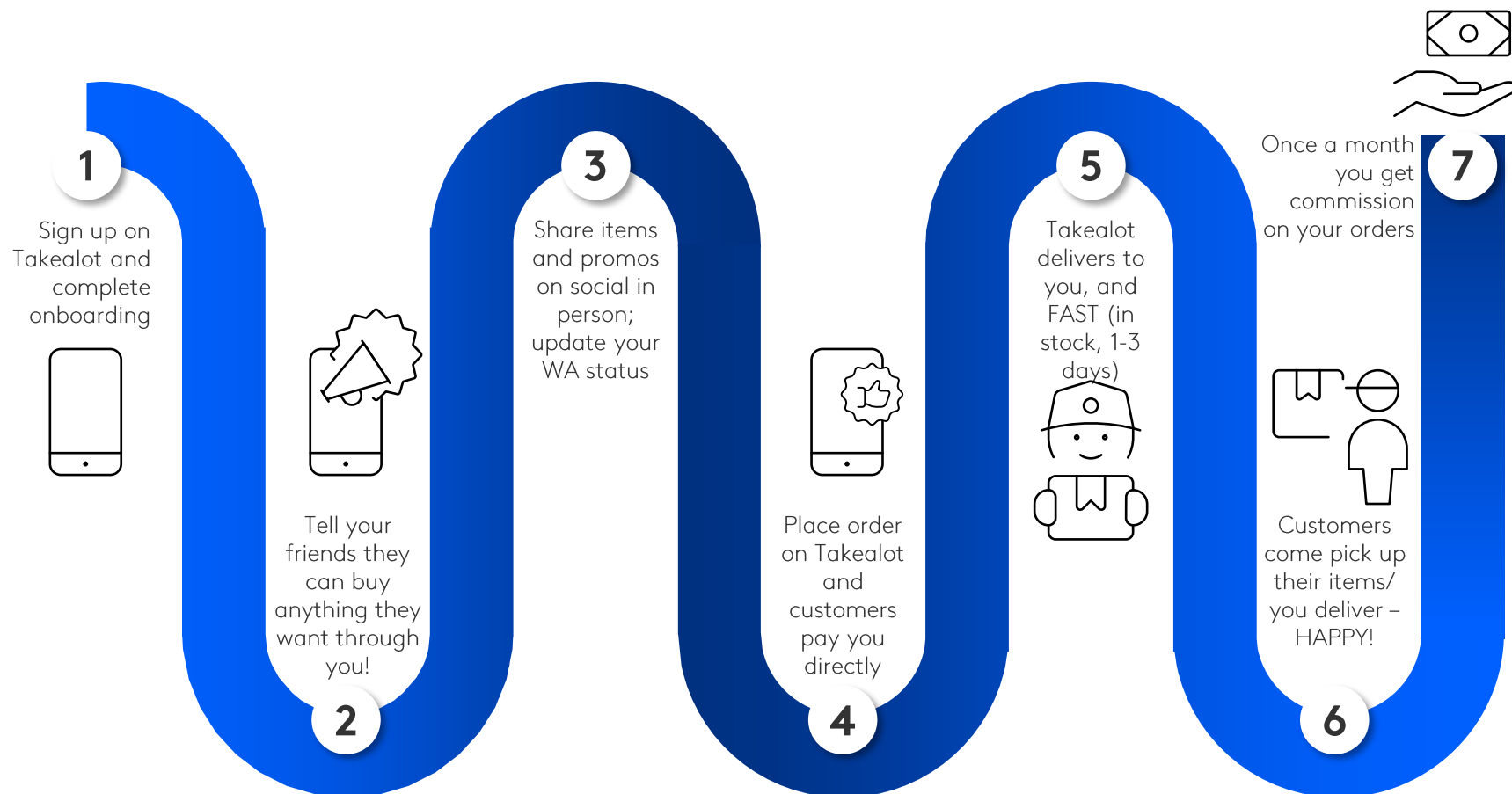
3,500 active Takealot personal shoppers in SA

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



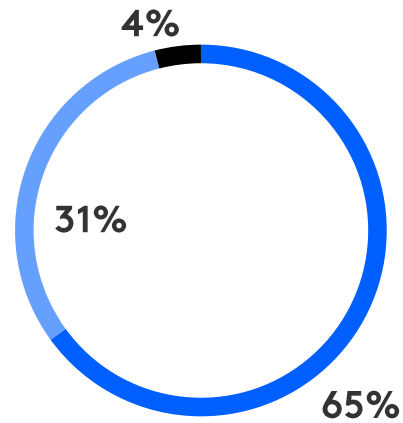
REACH
OUR
NATIONS



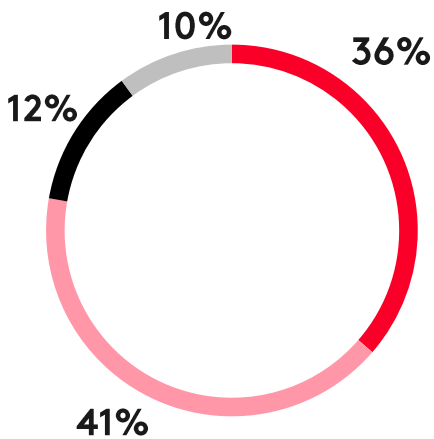
How internet is accessed

Wi-Fi and mobile data are the main gateways to internet connectivity across the region

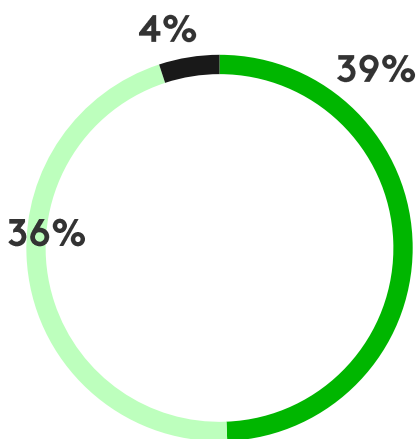
South Africa



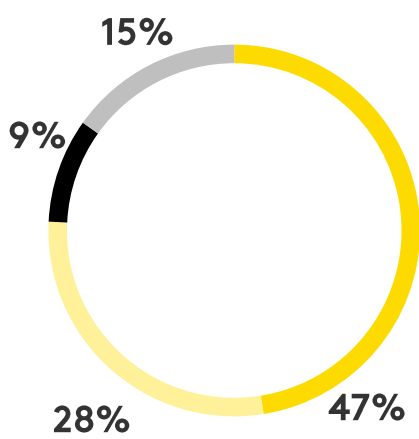
Kenya



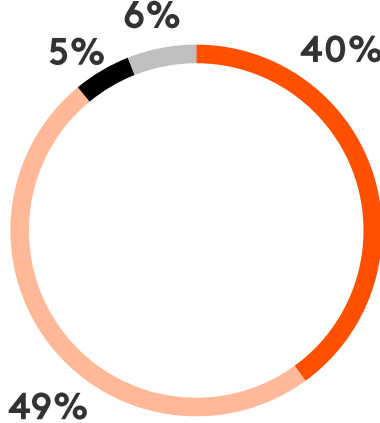
Nigeria



Senegal



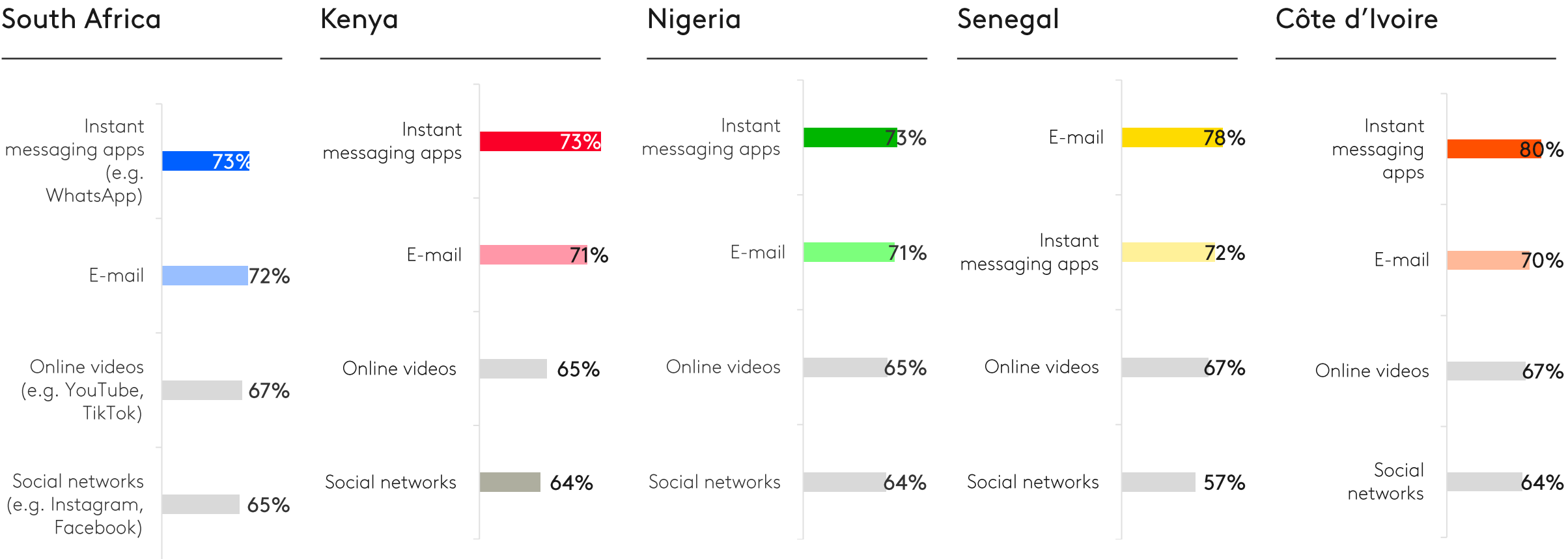
Côte d'Ivoire



Wi-Fi from home | Mobile data | Free Wi-Fi zones | Neighbour's Wi-Fi

Nett increase in use of top five media channels

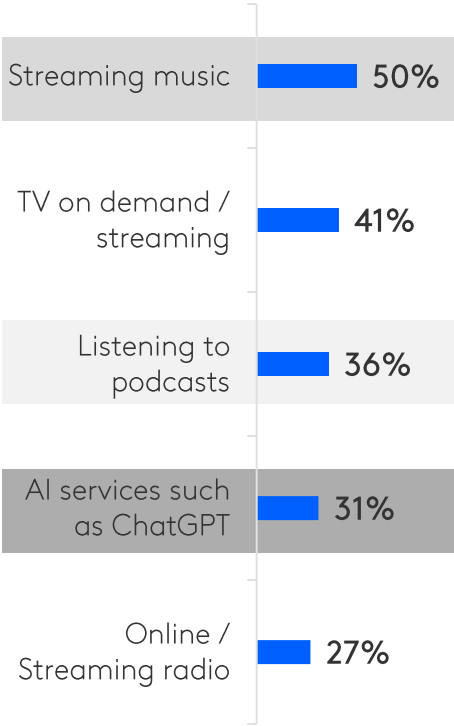
Digital media surge. Social apps and online video driving media consumption growth



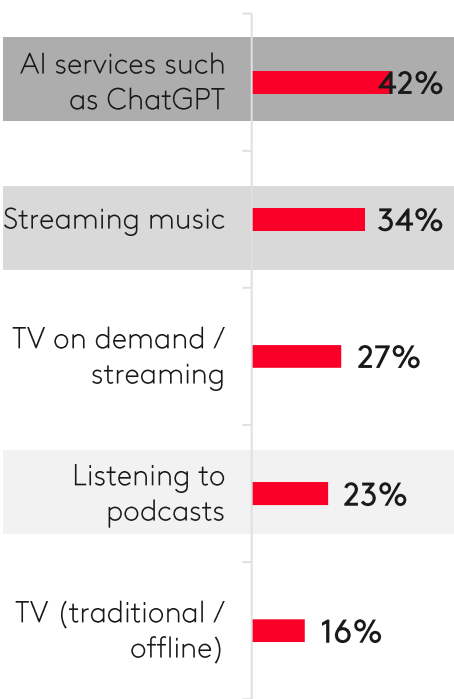
Similar trend noted among age groups across the region

AI and streaming music also continue to grow. Traditional offline platforms are alive and well

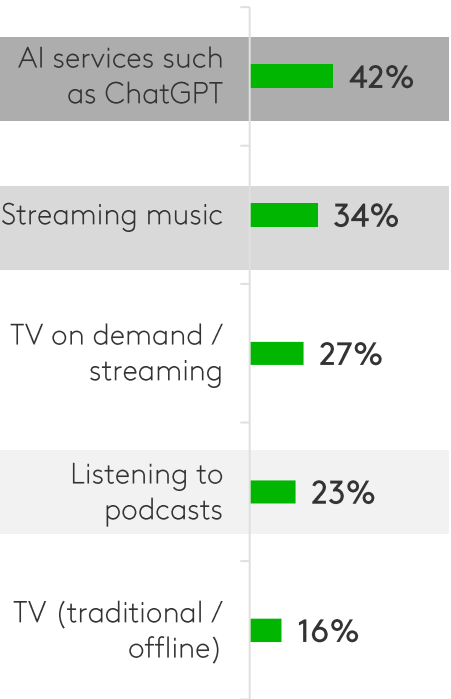
South Africa



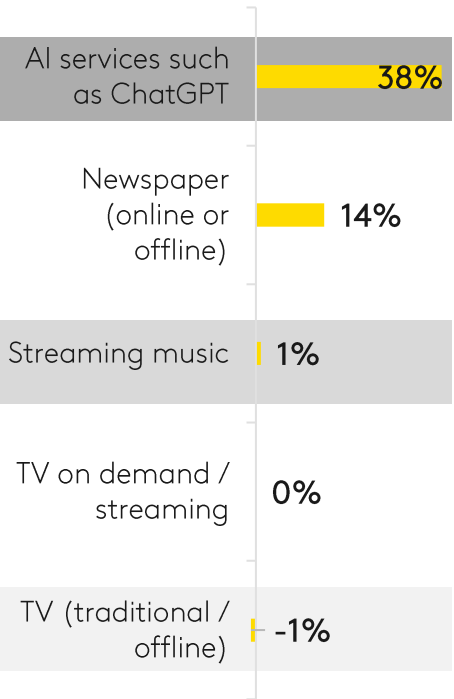
Kenya



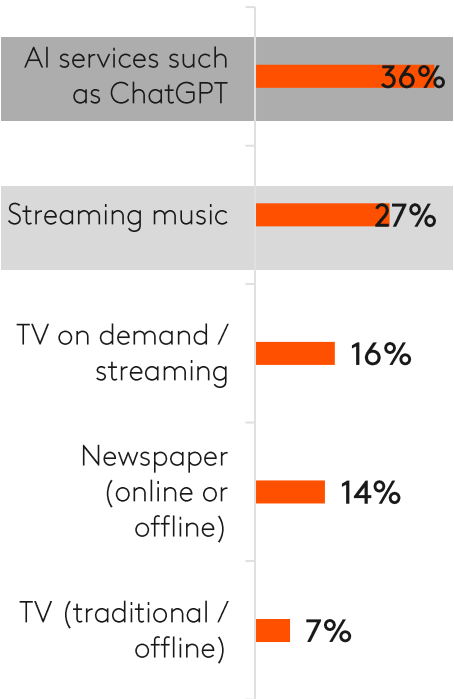
Nigeria



Senegal

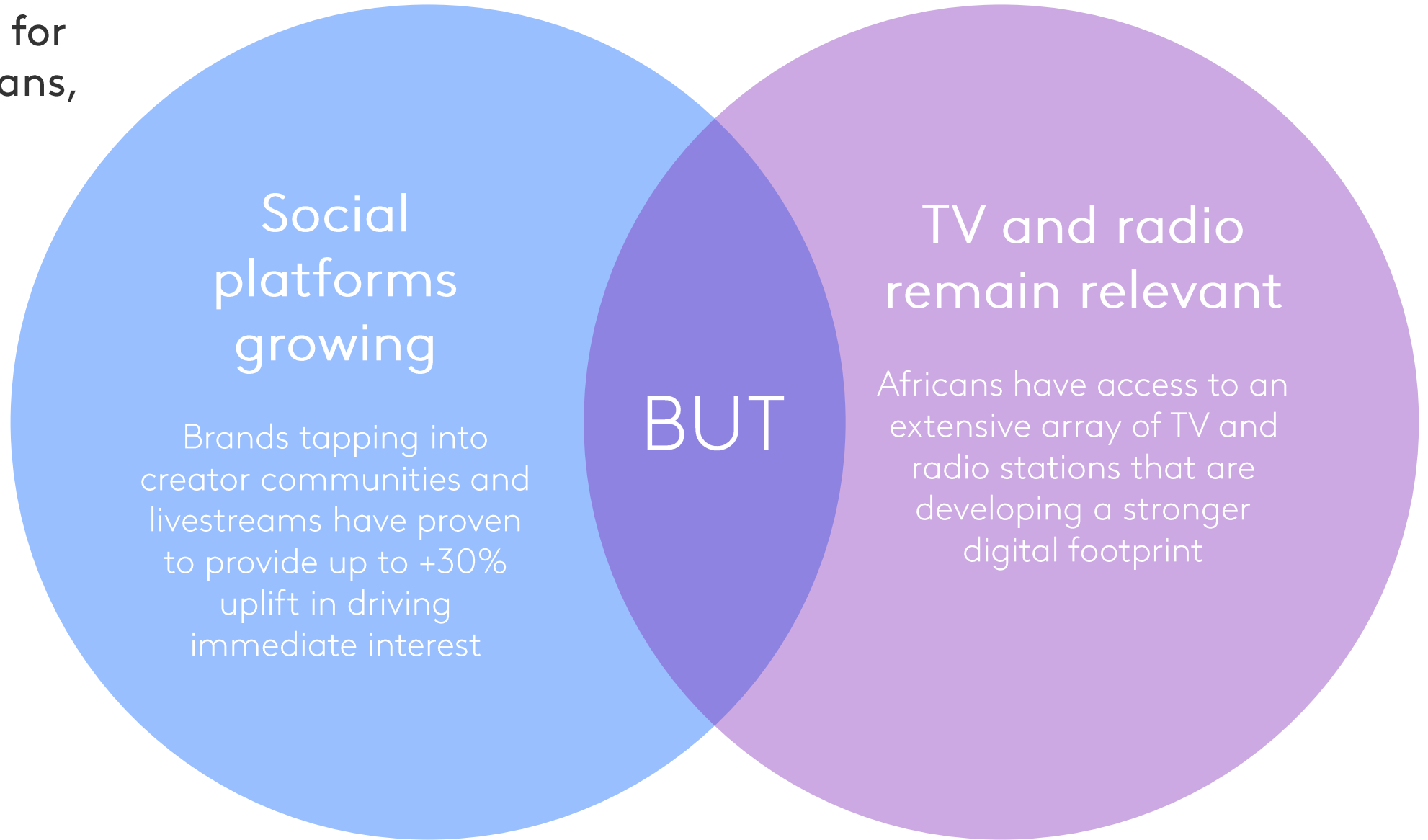


Côte d'Ivoire

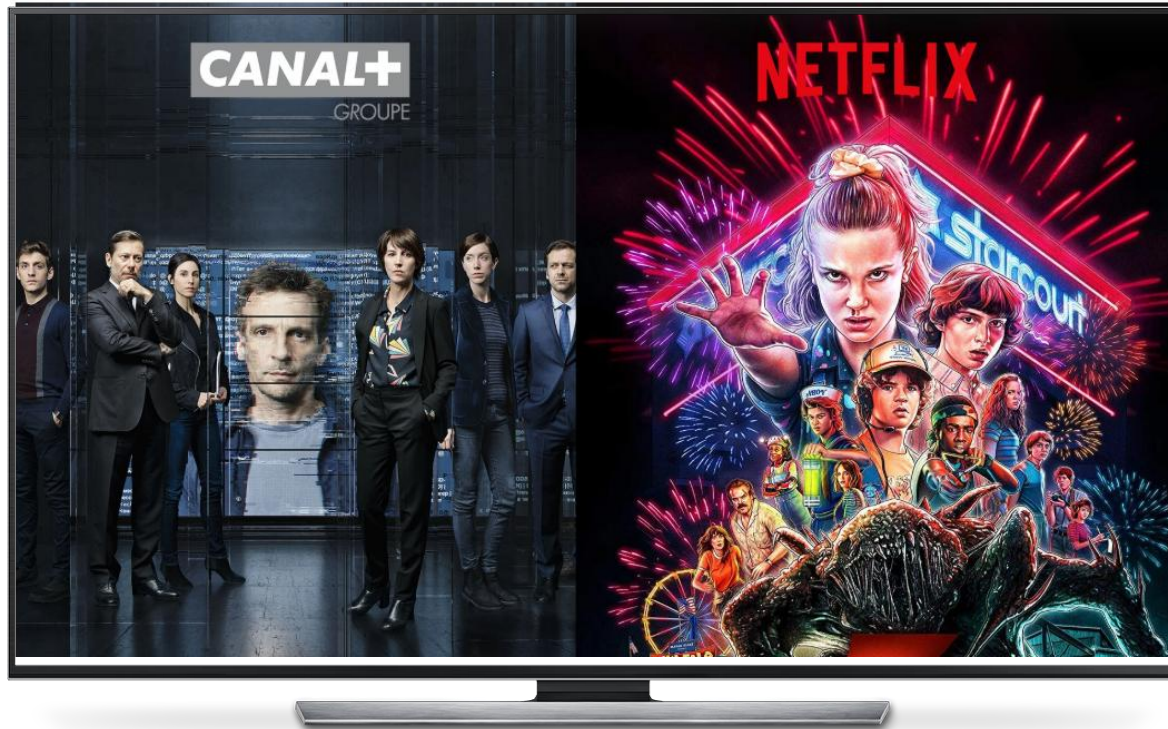


Similar trend noted among age groups across the region

If you're looking for
connected Africans,
start online...



Moreover, CANAL+, a major player in the Francophone media market, is actively pursuing strategic partnerships and acquisitions with streaming platforms to avoid falling behind with the increase of TV on demand



CANAL+ Group and Netflix partnership to include Netflix in CANAL+ offers.

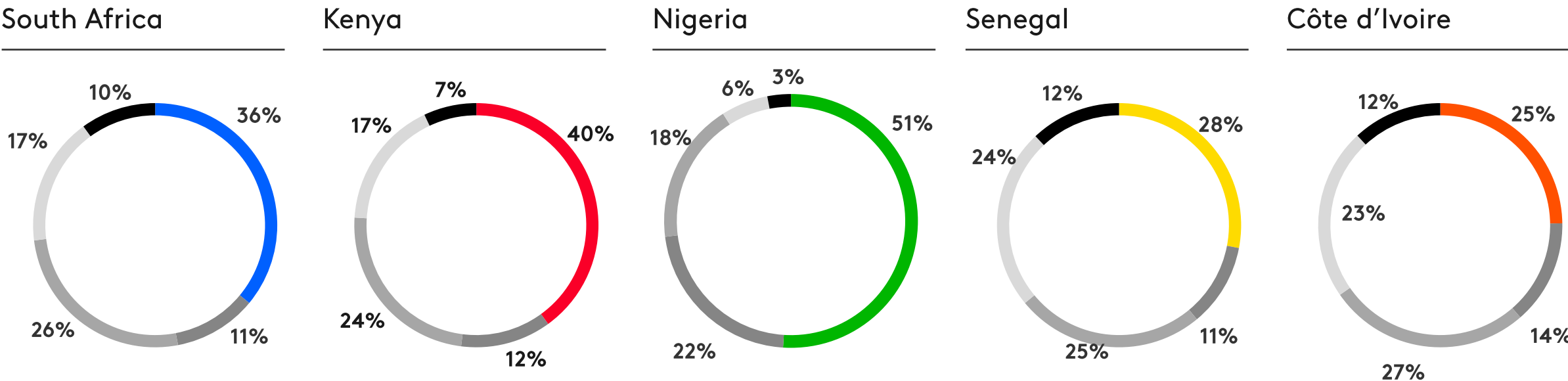
On October 15, CANAL+ subscribers who sign up for the CINE/SERIES pack will have access to both the premium CANAL+ channel and Netflix under a single subscription.



CANAL+ has made a fully funded mandatory offer to acquire all remaining MultiChoice shares at 125 ZAR each—well above the regulatory minimum—and both companies have agreed to cooperate on the offer's execution.

Frequency of AI use

AI adoption is gaining traction among connected Africans, with South Africa, Kenya, and Nigeria emerging as early adopters

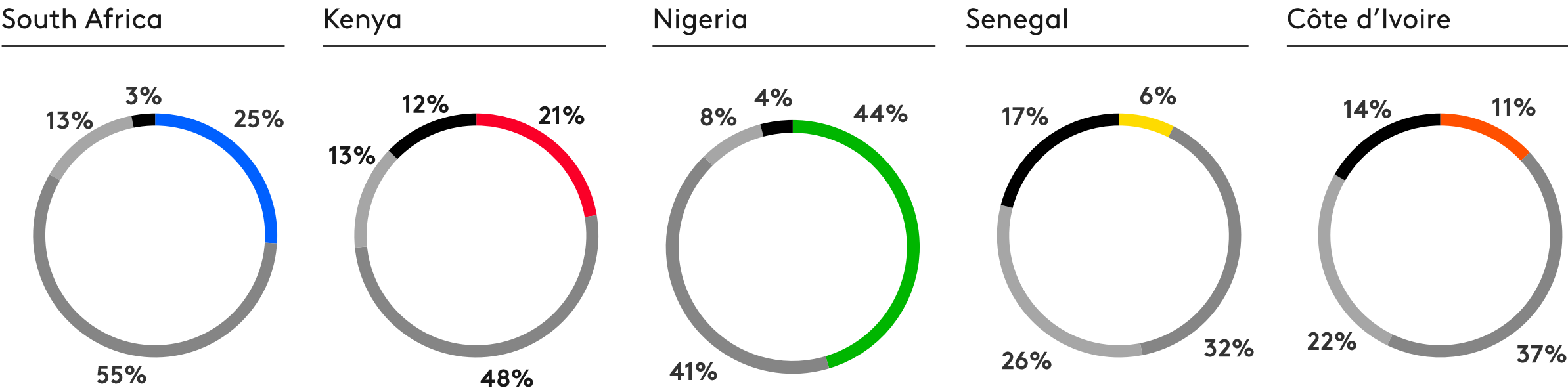


Multiple times a day | Once a day | A few times a week | Less often | Never

Usage of AI notably higher among higher social economic groups. Among connected Gen Zs, daily AI usage (multiple times a day + once a day) is highest in Nigeria (72%), followed by South Africa (55%) and Kenya (51%), with notable usage also observed in Senegal (44%) and Côte d'Ivoire (40%).

Podcast listenership

Podcast consumption on the rise, with more frequent listening observed in South Africa, Kenya, and Nigeria



Daily | Weekly | Monthly | Less than monthly

Daily podcast listenership is higher among higher-income segments in Nigeria (53%), Kenya (32%), and South Africa (29%)

Podcasting and the African Pop Culture Zeitgeist

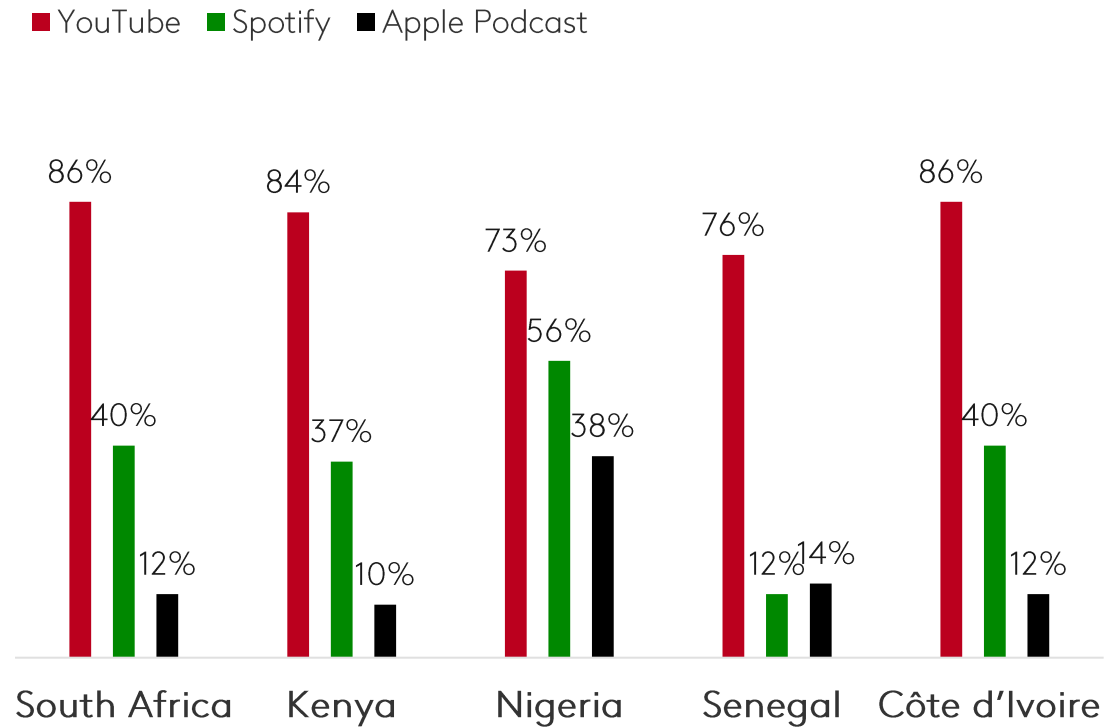
Africa's creator economy continues to surge. Gen Zs are at the forefront.



Podcast platform used and Africa's visual-first storytelling

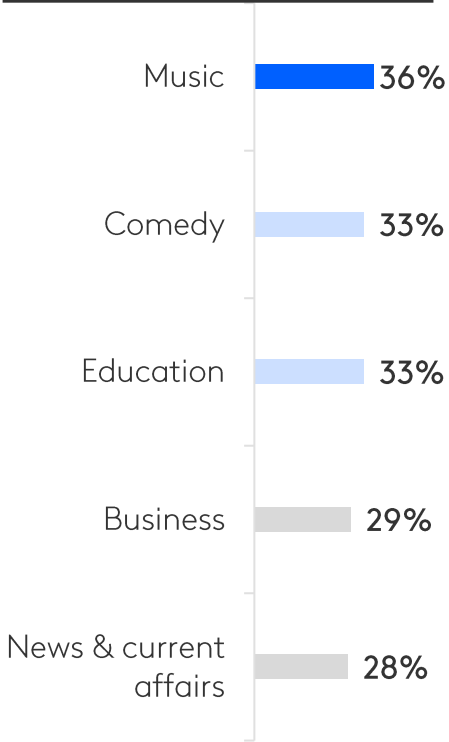
Podcast consumption takes both audio and video formats. YouTube the dominant platform among connected Africans

Platform used to listen/watch podcasts

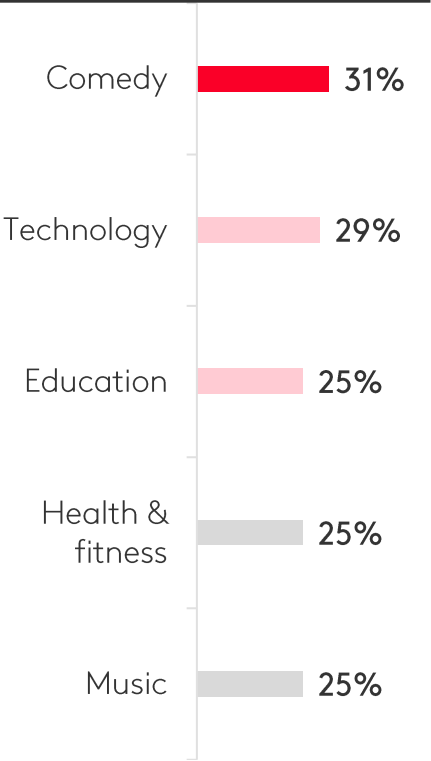


Top podcast genres are comedy, sports and education; music in South Africa is driven by DJ channels

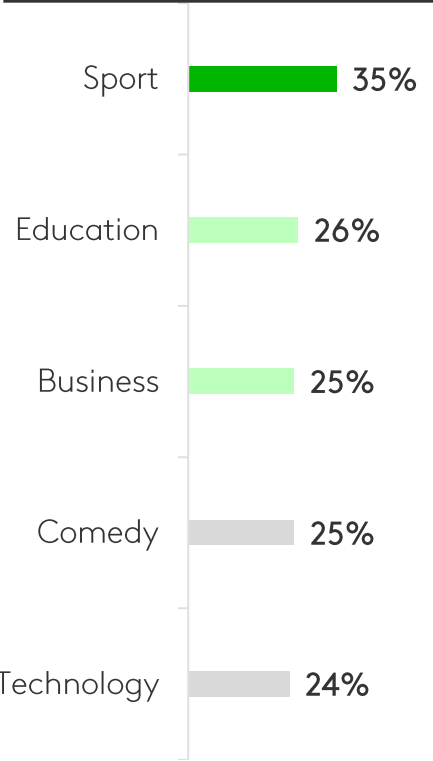
South Africa



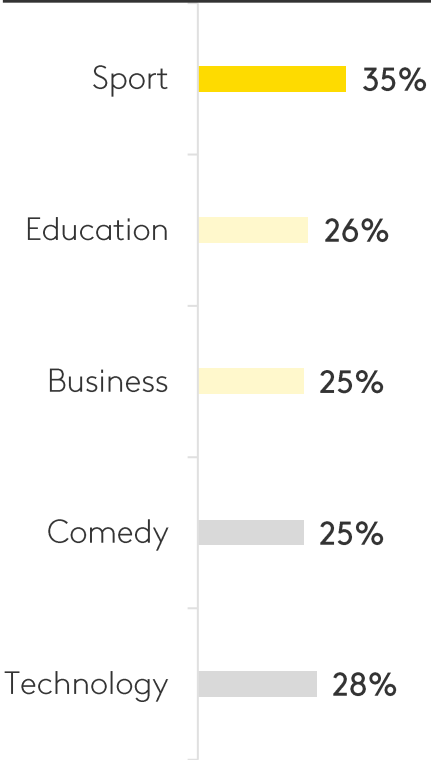
Kenya



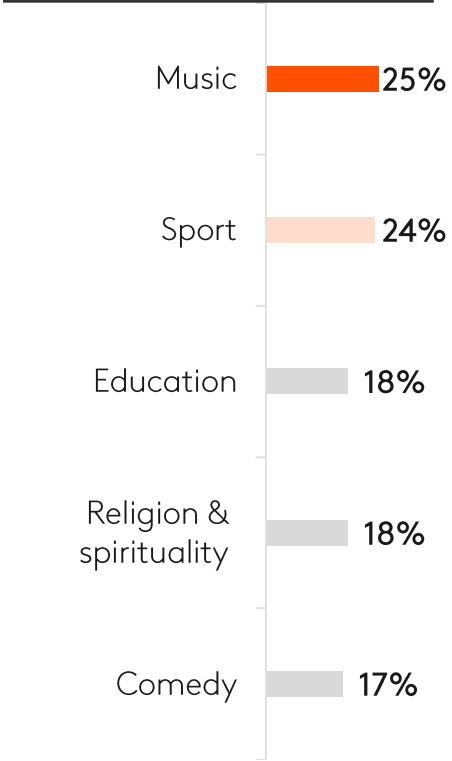
Nigeria



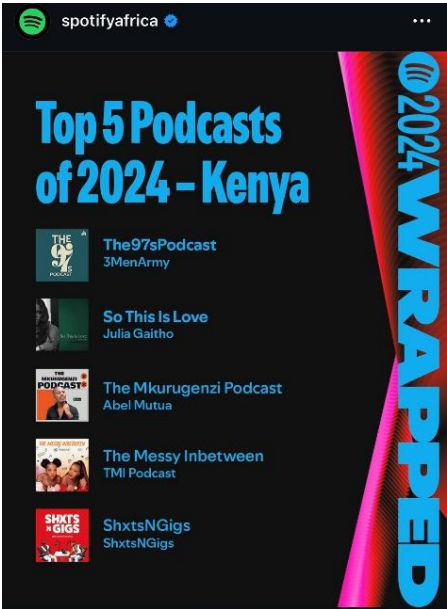
Senegal



Côte d'Ivoire



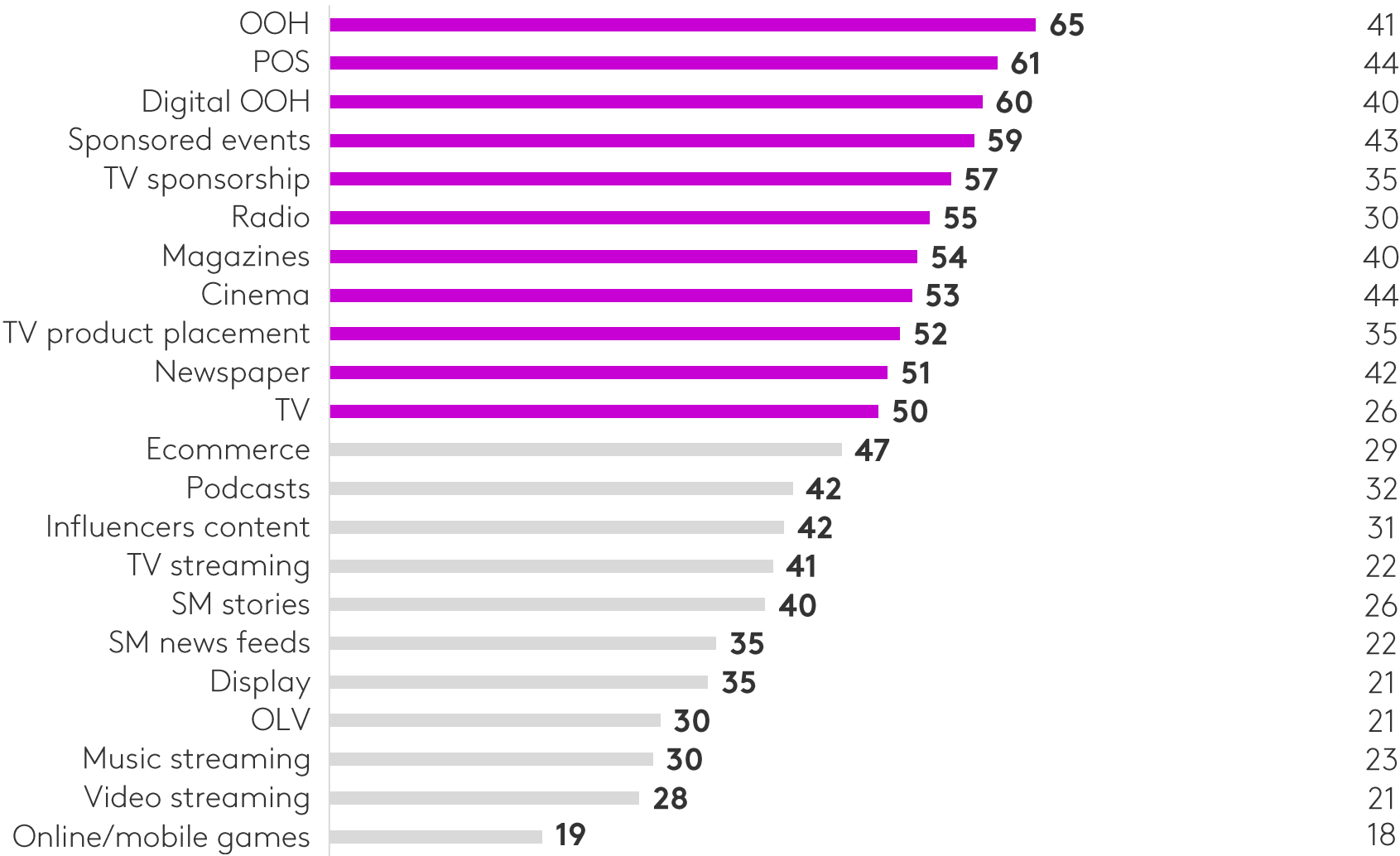
Brands across the region are tapping into the mic and the moment

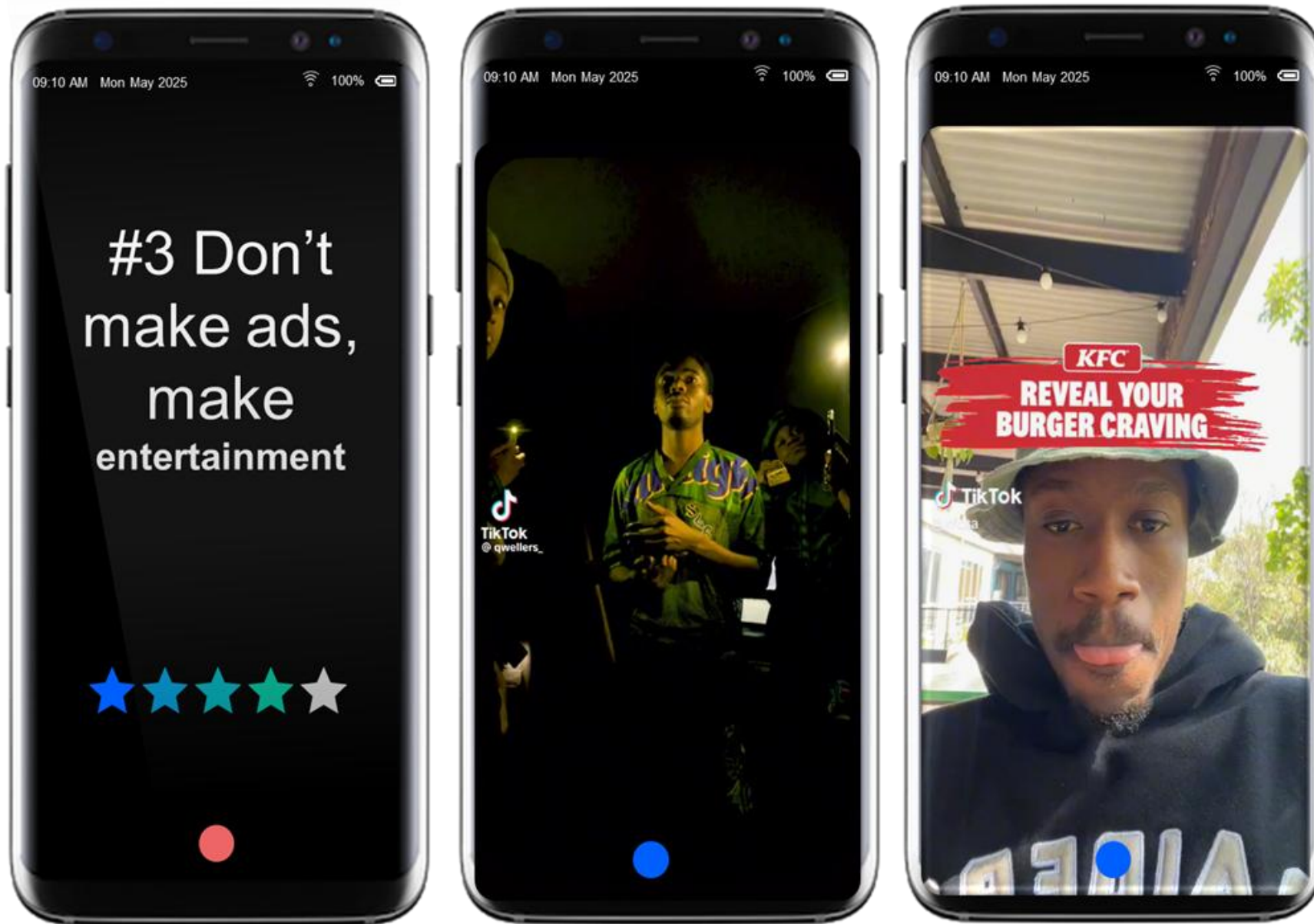


However, we prefer to be spoken to on offline channels

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

AD EQUITY

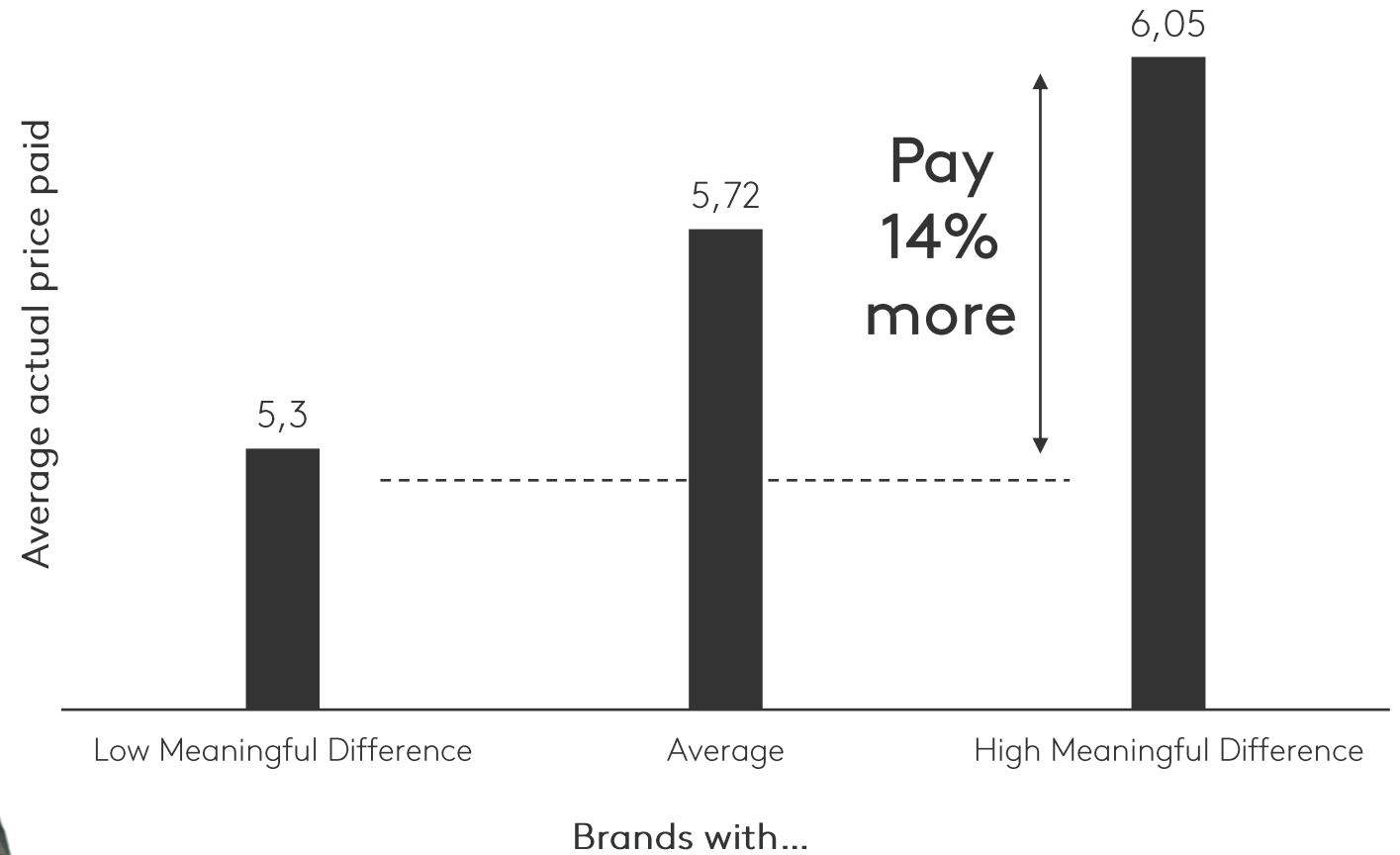




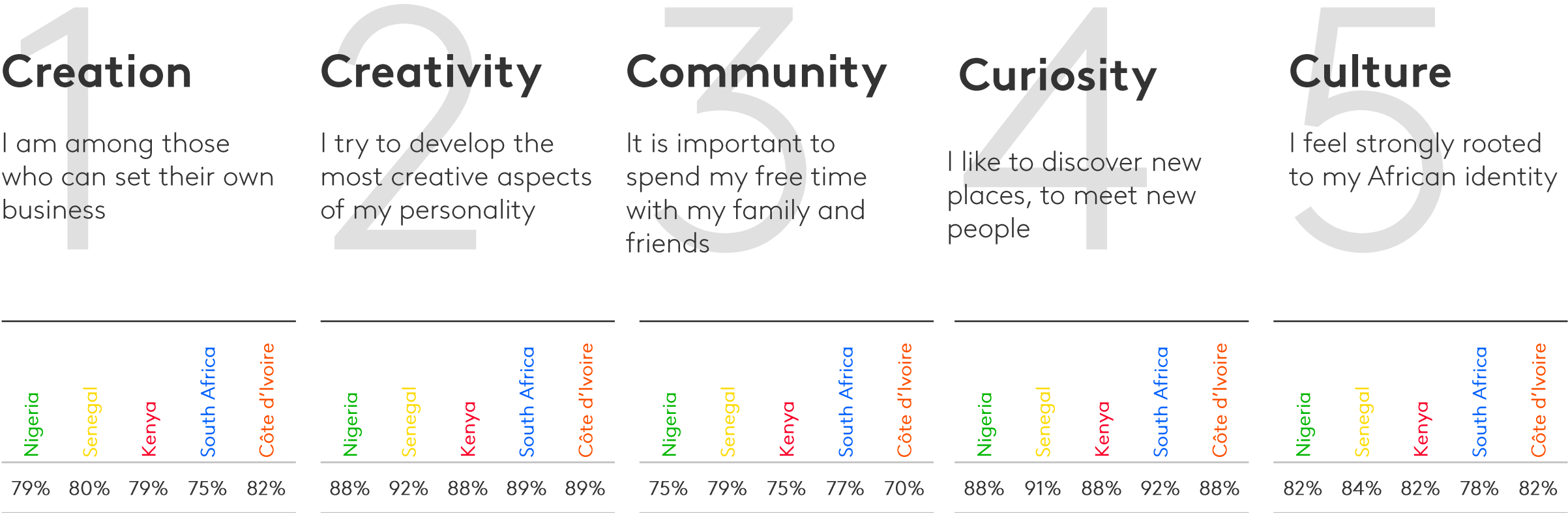
THE FATE OF OUR NATION



People are willing to pay 14% more for brands that they see as meaningfully different



Meet Africans where they place value



CULTURE

– MTN's viral advertisement
'See Naija'



WANT TO KNOW MORE?

Purchase the report

Webinar deck: free of charge

Full report, by market & two-hour workshop: \$20k

Per market report: \$5k

KANTAR AFRICALIFE

Reach out to your local Africa Life leads:



West Africa
Kanayo Bardi
kanayo.bardi@kantar.com



East Africa
Daniel Oseman
daniel.oseman@kantar.com



South Africa
Stacy Saggors
stacy.saggors@kantar.com



Francophone West Africa
Fabiola Nguembu
fabiola.nguembu@kantar.com
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PURCHASE THE REPORT



AFRICA LIFE 2025

Côte d'Ivoire
Kenya
Nigeria
Senegal
South Africa

Africa Life is back and it's evolving!
This year, we speak to 3000 connected consumers across key African markets* to gain a holistic understanding of consumer trends and sentiment as they adapt to the evolving macro and domestic circumstances.

Key themes include household income, employment and entrepreneurship, internet and mobile usage, aspirations and values, artificial intelligence, media and social media usage and shopping habits.

Purchase the report

- Africa Life webinar deck: free of charge
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KANTAR AFRICALIFE

*n=600 per market



The state of our nations: An overview of consumer sentiment and market realities



The plate of our nations: An overview of our in-home realities and behaviours as we find ways to cope with budgetary pressures



Online captures our nations: A look into the rise of online shopping, key categories and behaviour trends



Reach of our nation: A look into how our media and social media behaviours are evolving, including a view on emerging content creation trends

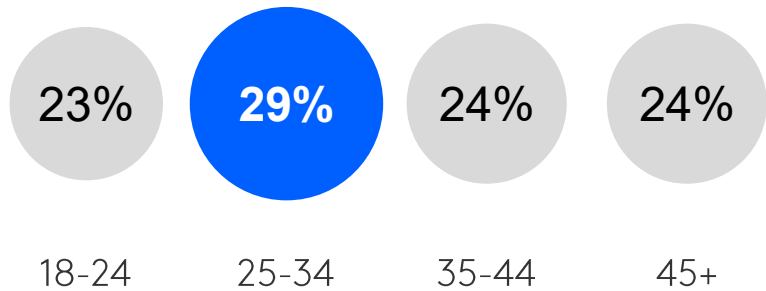
METHODOLOGY



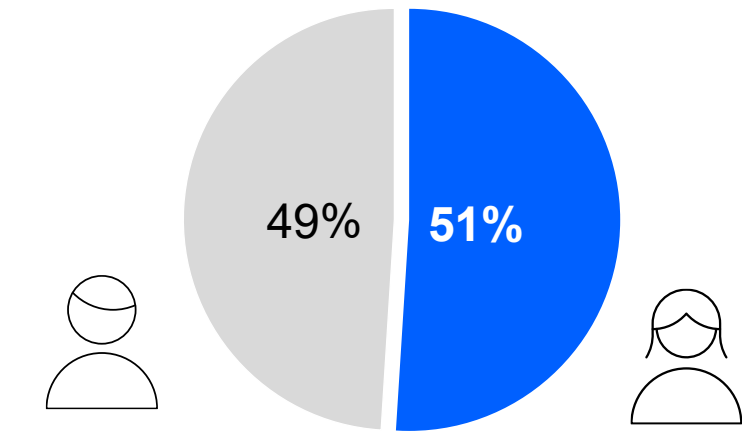
We spoke to 501 South Africans

representative of the connected* population of South Africa

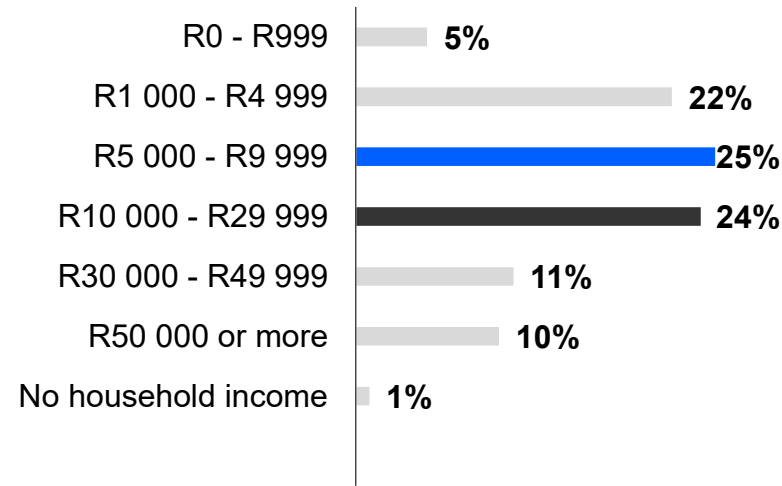
Age



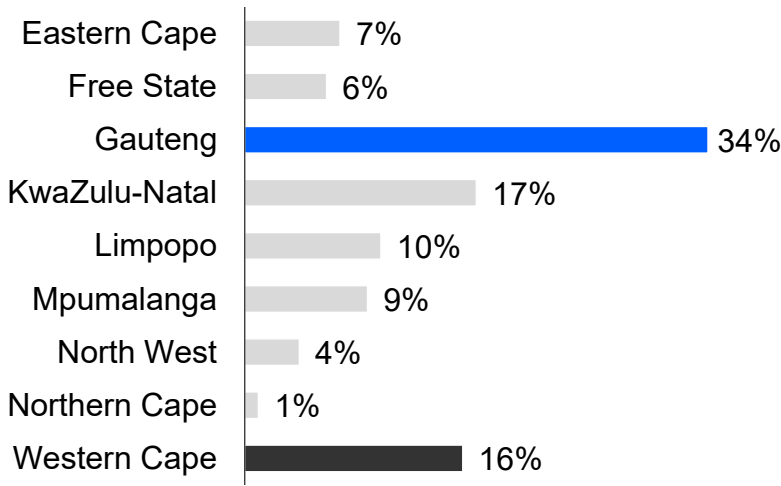
Gender



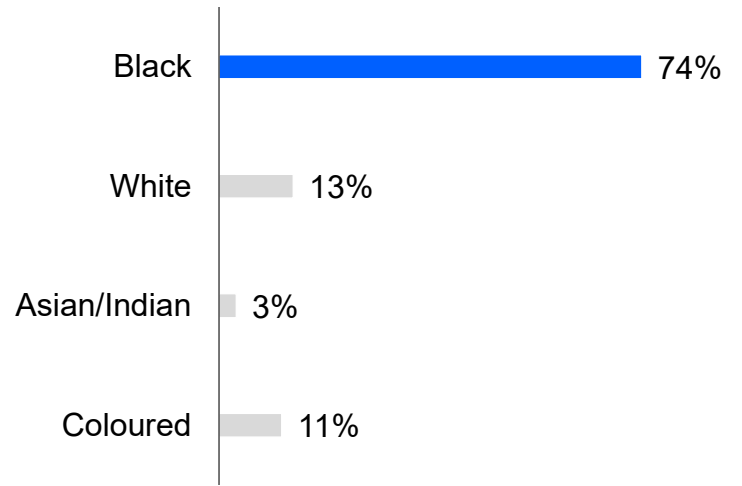
Household income



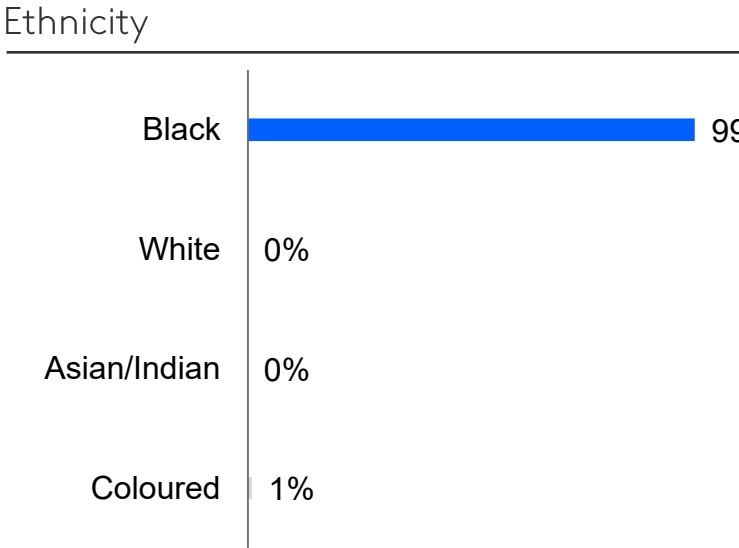
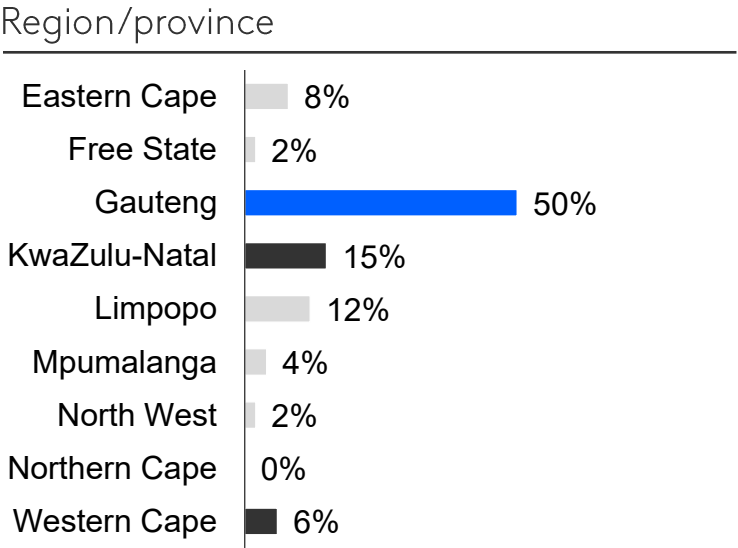
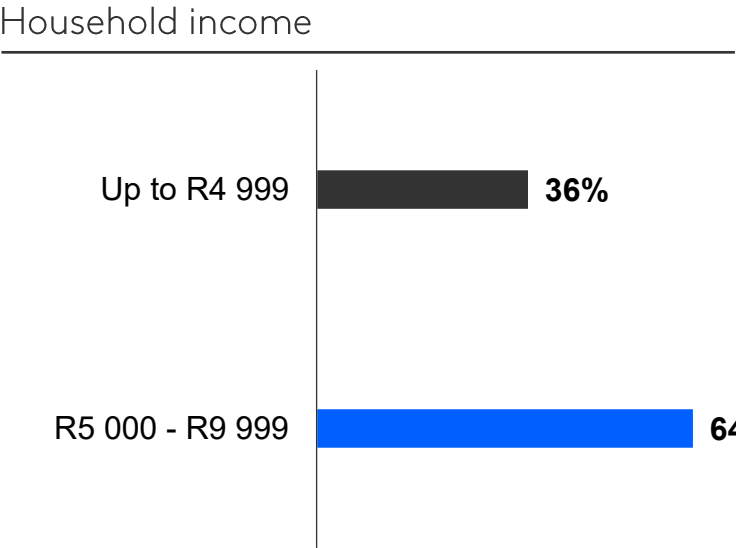
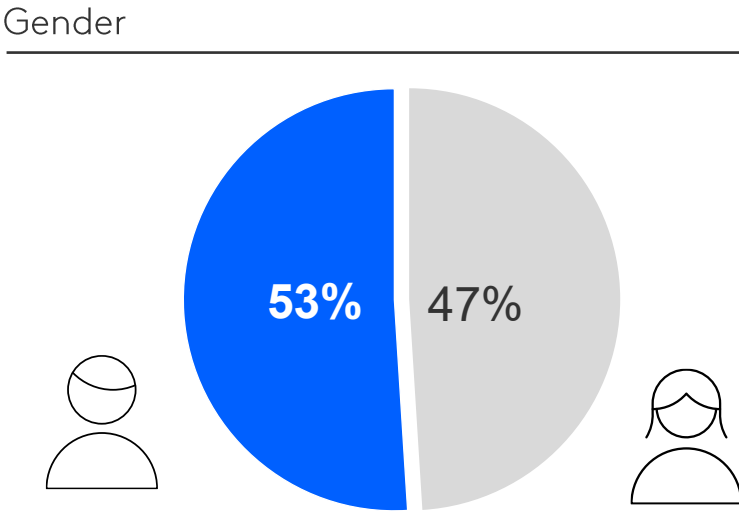
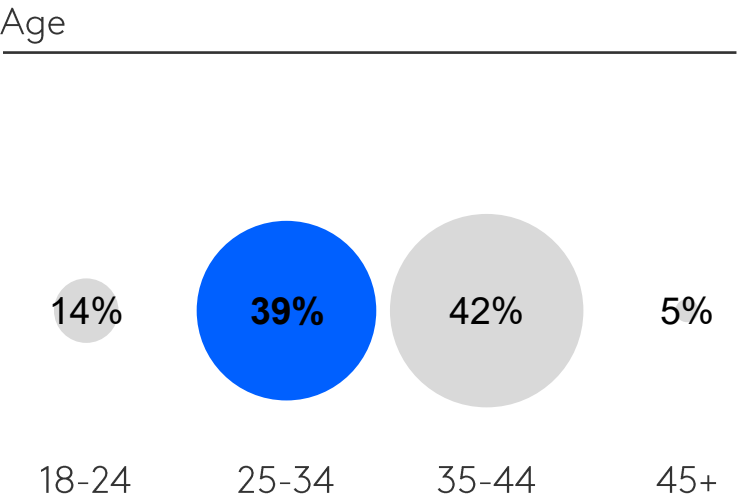
Region/province



Ethnicity



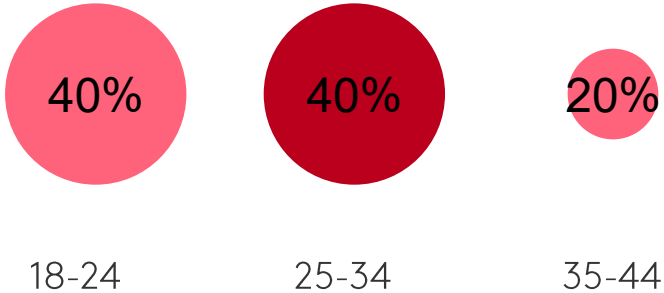
We spoke to 113 township-based South Africans



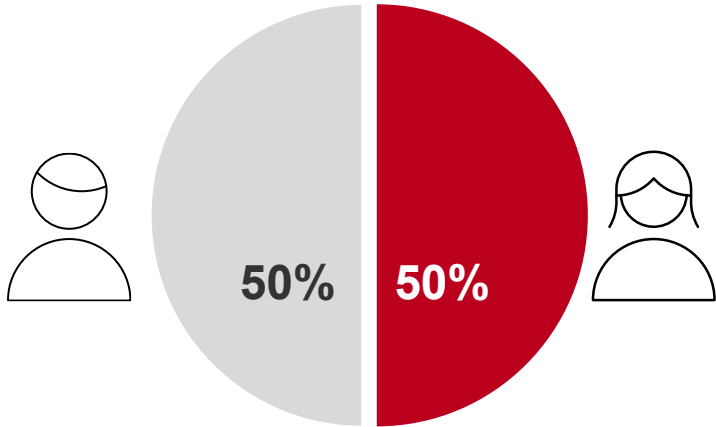
We spoke to 601 Kenyans online

representative of the
connected* population of
Kenya

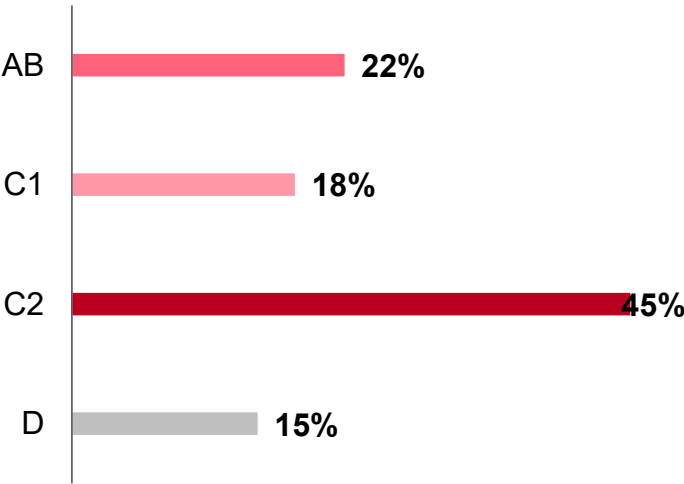
Age



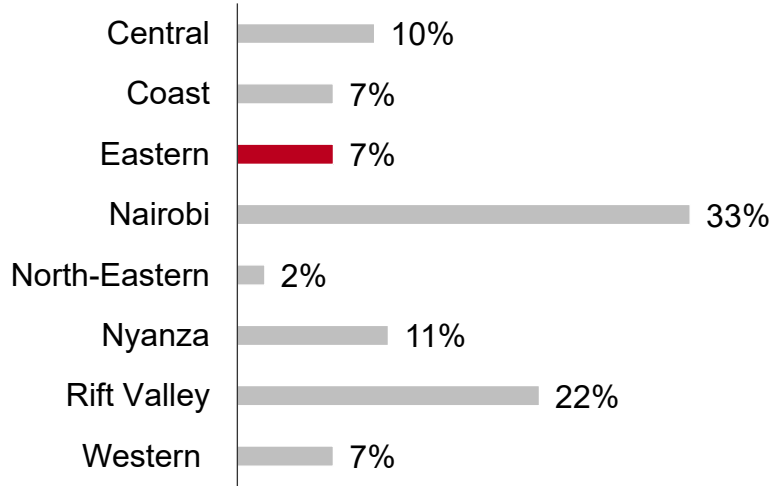
Gender



Household income



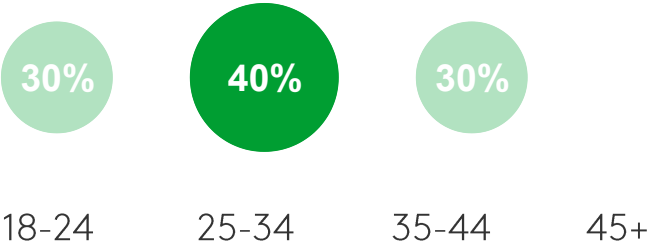
Region



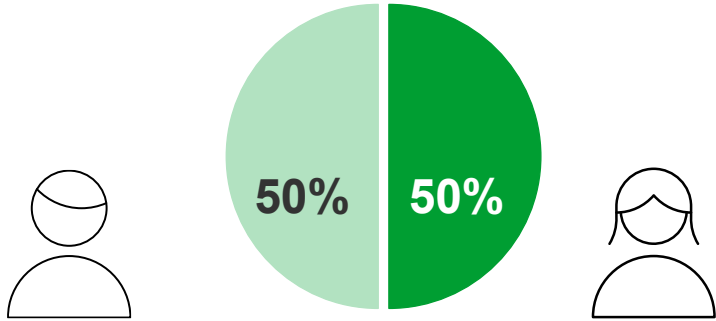
We spoke to 600 Nigerians

representative of the
connected* population of
Nigeria

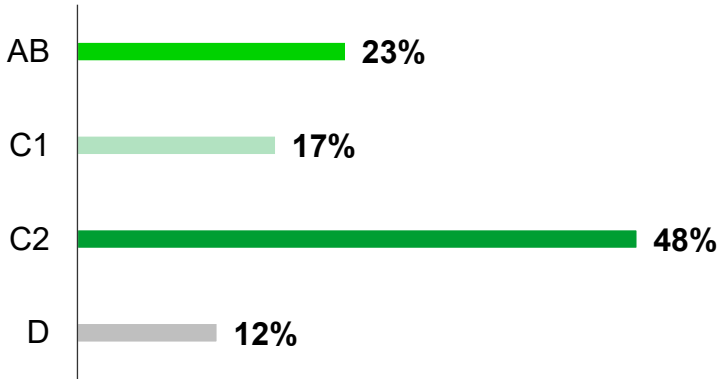
Age



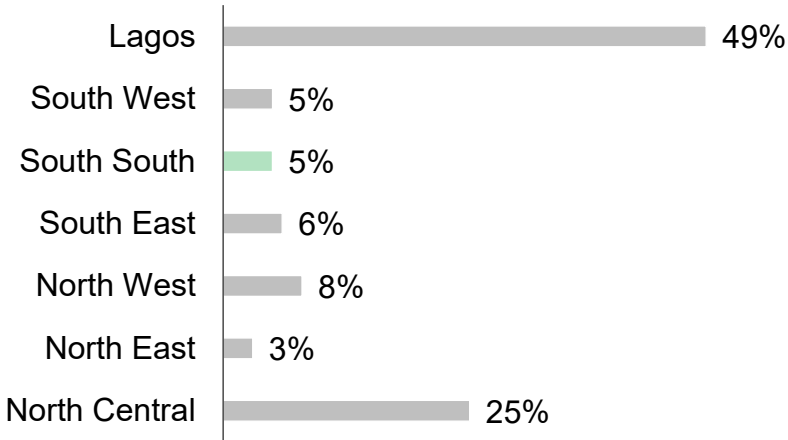
Gender



SEC



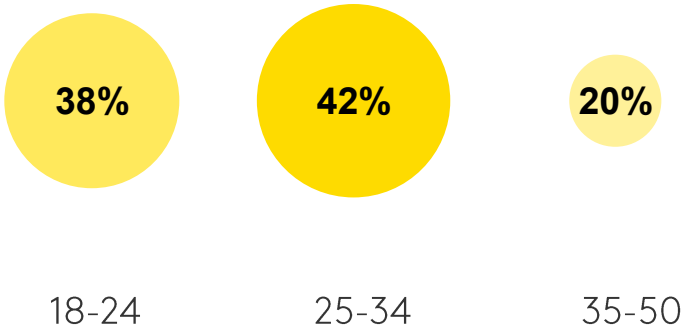
Region



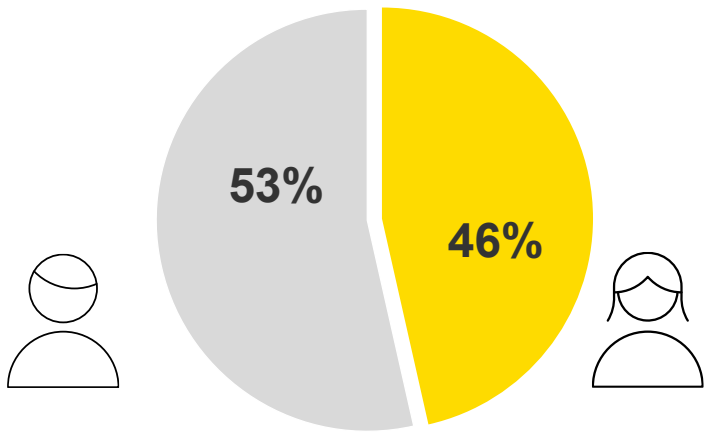
We spoke to 600 Senegalese

representative of the connected* population of Senegal

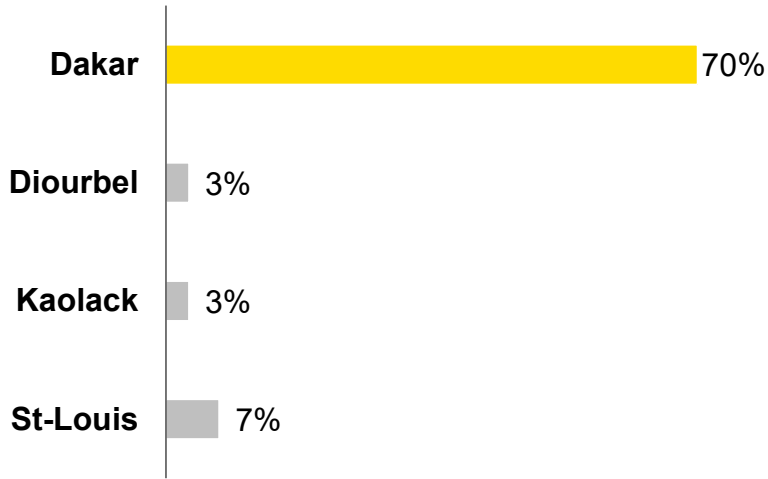
Age



Gender



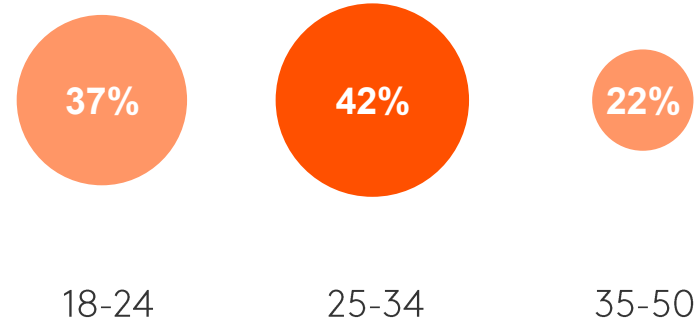
Region/province



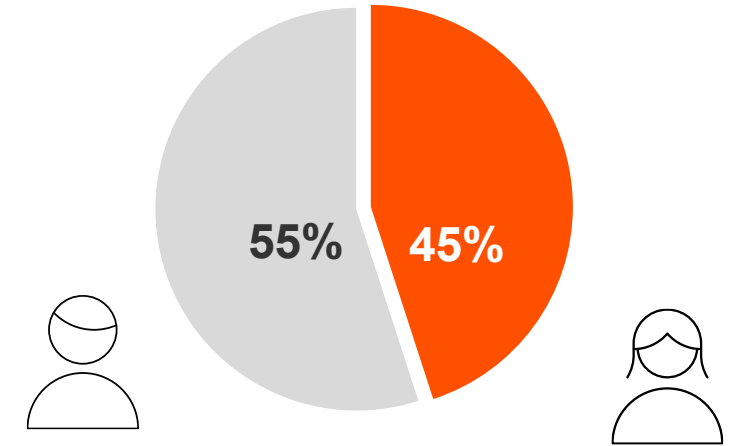
We spoke to 600 Ivorian

representative of the
connected* population of
Côte d'Ivoire

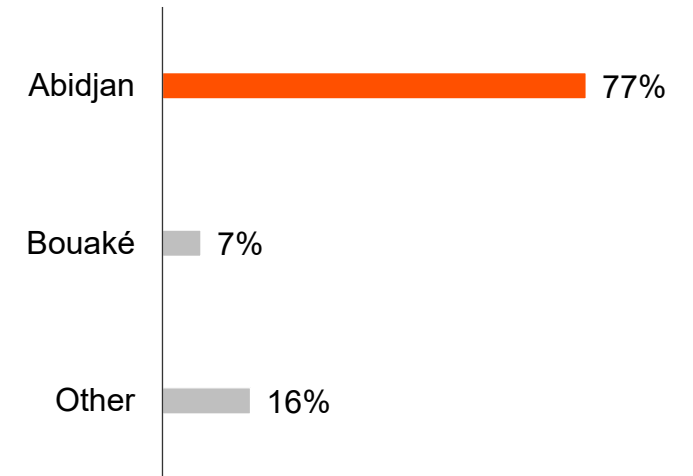
Age



Gender



Region/province



FUTURE
FUTURE
FUTURE
FUTURE
PROOF
PROOF
PROOF
PROOF
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MZANSI



KANTAR

Stacy Sagers

Commercial Growth Director
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