



# **Quality Over Price:**

## How South Africa's FMCG Shoppers are Changing the Game

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## **Inside the South African Basket: How Urban Shoppers are Redefining FMCG**

**Priorities.** This report presents a data-rich snapshot of South Africa's evolving FMCG landscape, grounded in GeoPoll's proprietary mobile research. From the rise of quality-driven decision-making to the balancing act between affordability and convenience, we explore how urban consumers are reshaping brand loyalty, channel preferences, and product expectations. Designed to inform strategic planning, this study offers actionable insights for manufacturers and retailers navigating one of Africa's most competitive and complex consumer markets.

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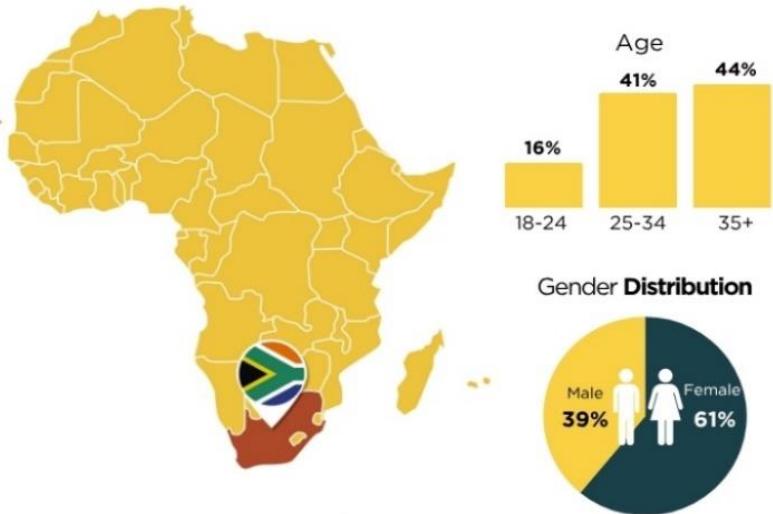
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# At a glance

## Overview

Across South Africa's urban centers, a quiet transformation is reshaping how consumers fill their shopping baskets. Today's connected shoppers are increasingly thoughtful in their decisions no longer driven solely by brand recognition or bargain pricing. Instead, quality has emerged as the defining factor across categories.

GeoPoll conducted this survey in May 2025, the total sample comprised 500 respondents using its mobile-first data collection platforms, including the GeoPoll App and Mobile Web interface. Surveys were distributed to GeoPoll's active mobile panel, ensuring a robust, randomized sampling process.



## Key Findings



### Quality is king

- Across nearly every product category – beverages, dairy, staples, personal care – quality consistently ranks as the leading purchase driver, outpacing price and brand considerations.



### Supermarkets Dominate Retail Channels

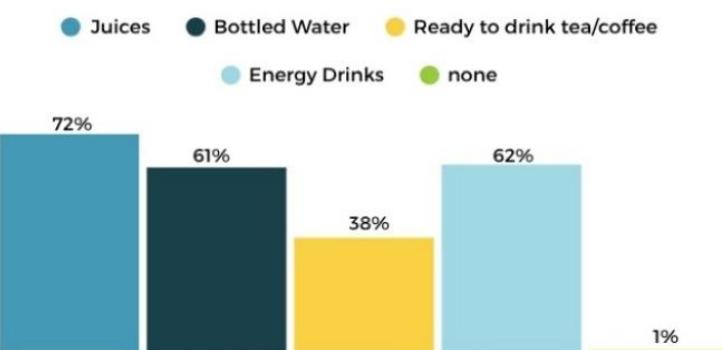
- Large supermarket chains capture roughly 60–70% of reported purchases in categories like dairy, fresh foods, personal hygiene, and household care, making them the most preferred shopping destinations.



### Brand Loyalty Is Earned, Not Assumed

- South African shoppers are increasingly discerning – they stay loyal only when brands continually deliver quality and value.

## Non - alcoholic beverages



## Alcoholic beverages



## Staple Food

Top items: Cooking oil (80%), sugar (80%), Bread (76%), flour/mixes (57%).

## Fresh and Chilled Foods

Top items: Vegetables (76%), fruits (71%), eggs (66%).

## Personal Care & Hygiene

Top items: Toothpaste (86%), soap (83%), deodorants (79%).

A woman with dark hair, wearing a light pink top and blue jeans, is shopping in a grocery store. She is looking up at a display of products. In the background, there are shelves stocked with various fruits and vegetables, including lemons and apples. The lighting is bright, typical of a supermarket.

## Quality is king

In every major FMCG category, quality isn't just preferred — it's expected. Urban South African shoppers are redefining value, placing quality above price and brand, even in cost-sensitive categories like staples and dairy. For brands, delivering on quality is no longer optional — it's the gateway to loyalty.

## Summary Findings

Across South Africa's urban centers, a quiet transformation is reshaping how consumers fill their shopping baskets. Today's connected shoppers are increasingly thoughtful in their decisions no longer driven solely by brand recognition or bargain pricing. Instead, **quality has emerged as the defining factor** across categories, from food and beverages to personal care and household goods.

GeoPoll's May 2025 survey of approximately 500 urban consumers — conducted nationally via [TuuCho AI Insights Platform](#), offers a clear window into the mindset of the modern South African FMCG shopper. The data reveals a consumer who is quality-conscious yet highly price-aware, selectively loyal, and deeply convenience-driven. Whether shopping in large formal supermarkets or local informal outlets, respondents demonstrate evolving expectations centered on performance, consistency, and practicality.

These trends are reshaping the dynamics of retail and brand engagement. For any stakeholder operating in South Africa's FMCG landscape from manufacturers to retailers, marketers to strategists the message is clear: today's consumer is deliberate, discerning, and demands value that extends beyond price tags or historical brand equity.

### Key Trends at a Glance

- **Quality Is the Top Priority:** Across nearly every product category – beverages, dairy, staples, personal care – *quality* consistently ranks as the leading purchase driver, outpacing price and brand considerations. Shoppers won't compromise on quality, even for everyday essentials, underscoring a demand for trusted, reliable products.
- **Supermarkets Dominate Retail Channels:** Formal retail is king for most purchases. Large supermarket chains capture roughly 60-70% of reported purchases in categories like dairy, fresh foods, personal hygiene, and household care, making them the most preferred shopping destinations.
- **Informal Channels Still Matter:** Despite supermarket dominance, informal outlets (local shops, spazas, kiosks, open-air markets, and wholesale supply stores) remain vital, especially for beauty, snacks, and alcoholic beverages. These channels provide convenience and community

access, collectively accounting for about one-quarter to one-third of purchases in many categories.

- **Staples & Fresh Foods Are Household Essentials:** Nearly *three-quarters* of surveyed households regularly purchase kitchen staples like cooking oil and sugar, as well as fresh produce (vegetables) and proteins (eggs) – highlighting the importance of daily-use, nutritious goods in the consumer basket. These essential items see some of the highest penetration rates (roughly 70–80% of consumers), affirming that even in tight economic times, South Africans prioritize basic food quality and nutrition.
- **Beauty and Personal Care: Quality-Driven but Brand-Sensitive:** In personal care and beauty products, consumers prize quality first and foremost, but *brand* still carries weight. For example, perfume stands out as a leading beauty purchase (a majority of beauty shoppers buy fragrance), yet buyers show conditional brand loyalty – they value performance and will switch if a product doesn't meet expectations. In categories like deodorants, skincare, and cosmetics, brand heritage influences choice, but it doesn't trump quality.
- **Brand Loyalty Is Earned, Not Assumed:** South African shoppers are increasingly discerning – they stay loyal only when brands continually deliver quality and value. If a trusted brand falters (e.g. a noticeable drop in quality or an immoderate price hike), consumers won't hesitate to explore alternatives. In competitive categories, underperformance leads to quick brand rejection.
- **Convenience is on the Rise:** Convenience-oriented products are gaining ground fast. Among packaged food buyers, 62% purchased ready-to-eat meals, far exceeding canned (23%) or frozen food (21%) alternatives. Bread (70%) and chips/crisps (71%) top the snack list - both versatile, zero-prep staples. The result is a clear shift: consumers are choosing speed, simplicity, and accessibility, particularly in food choices.

Below, we dive deeper into these trends – from the tug-of-war between quality and price, to the evolving retail channel mix, the nuances of brand loyalty, and the growing premium on convenience.

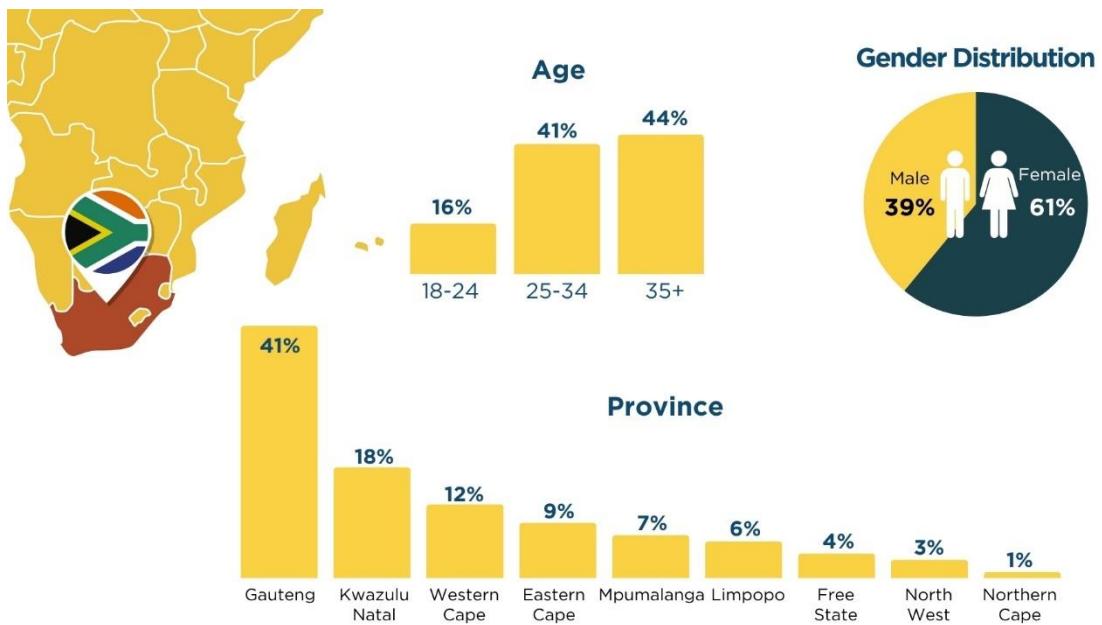
## Methodology

This report is based on primary data collected by [GeoPoll's Tuucho platform](#) a mobile-first, AI-powered research engine designed to rapidly capture real-time consumer insights across emerging markets. Using a combination of mobile app and web-based surveys, GeoPoll deployed a short-form FMCG questionnaire in May 2025 to a randomized, opt-in sample of 501 urban South African adults, achieving results in under 72 hours.

The final sample included a strong representation of the digitally connected, economically active segment, with 61% female and 39% male respondents, and a concentration in the 18–35 age group. While not nationally representative in the strictest sense, this demographic reflects the core consumer base driving urban FMCG trends from supermarket aisles to informal trade. Importantly, despite being a digital sample, the study captured meaningful engagement with informal retail channels such as spaza shops, local markets, and kiosks a hallmark of South Africa's hybrid shopping ecosystem.

Respondents reported on their recent purchases across ten product categories spanning food, beverages, personal care, and household goods and the motivators behind those purchases, including price, brand, quality, and advertising influence. They also identified their preferred retail channels, enabling channel-mix analysis across both formal and informal settings. All responses were anonymized and aggregated, allowing for segmentation by age, gender, province, income level, and shopping behavior.

By leveraging Tuucho's rapid deployment and AI-powered targeting, GeoPoll delivered statistically rich, demographically segmented insights in real time offering FMCG stakeholders a powerful blueprint for understanding how South African consumers think, shop, and decide.



The sample in South Africa skewed toward younger adults, with the majority aged 25-34 and 35+ years. While not nationally representative, this demographic tilt reflects the nature of the data collection method: mobile-based surveys predominantly reach individuals with consistent access to the internet and smartphones. In the South African context, this often includes youth and digitally connected urban populations.

GeoPoll's methodology captures behavioral nuances across both formal and informal retail landscapes. Although respondents tend to be digitally engaged, many still report frequent use of informal purchasing channels such as spaza shops, street vendors, and local markets—providing a well-rounded perspective on modern South African consumer behavior.

All data has been anonymized and aggregated. This analysis focuses on both cross-category trends and national-level insights specific to South Africa, uncovering patterns and opportunities unique to this market within the broader regional context.

# Inside the Urban Basket: What Drives FMCG Decisions in South Africa

From brand loyalty to shopping channels, this section unpacks the behaviors, preferences, and motivators behind how connected South African consumers shop today and what that means for the brands and retailers who serve them

## Quality Versus Price: The New Hierarchy of Purchase Drivers

One of the clearest findings from the survey is that quality outranks price across the board. When asked their number-one purchase driver in various categories, consumers overwhelmingly chose product quality over price and brand name in all 10 categories surveyed. This holds true for everything from basic foodstuffs to personal care items. Even in staples like cooking oil and sugar – where one might expect tight budgets to put price first – *quality* was cited as the top factor by more shoppers than any other consideration.

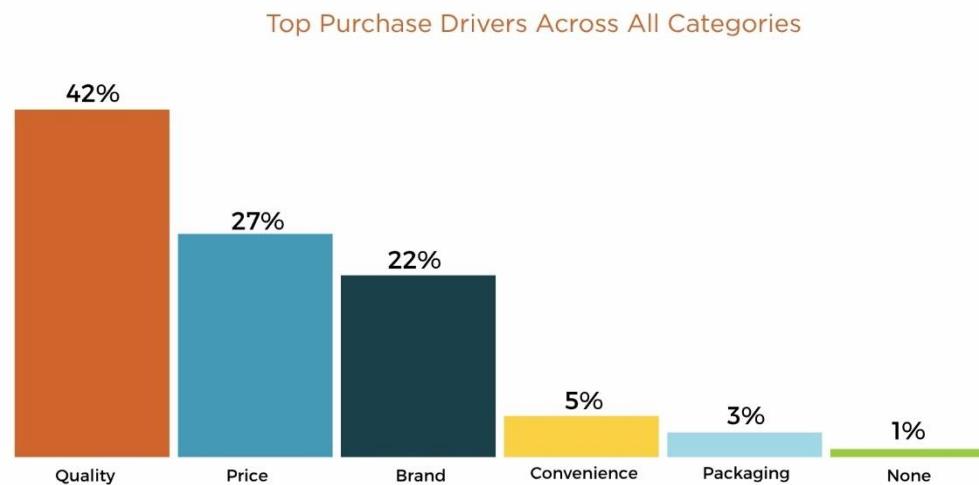


Figure 1: Quality emerges as the leading purchase driver across FMCG categories, according to GeoPoll's Tuucho-powered survey. Based on aggregate responses across all categories, 42.3% of mentions cited *Quality* as the most important factor when making purchase decisions—well ahead of *Price* (26.9%) and *Brand* (21.6%). Other drivers like *Convenience* (5.0%), *Packaging* (3.2%), and *Other* factors (1.0%) were mentioned far less frequently. This clear margin highlights the rising importance consumers place on product performance, safety, and reliability over traditional levers like price or brand reputation.

## Quality Reigns, Brand Stalls

With over 42% of all purchase decisions driven primarily by *quality*, South Africa's

urban FMCG shoppers are resetting the rules of engagement. While *price* (26.9%) and *brand* (21.6%) remain influential, they now trail quality by a wide margin—signaling that trust in a product's performance outweighs both frugality and legacy brand equity.

This shift suggests that brand loyalty is no longer guaranteed. In categories where brand and price used to dominate, we now see them in near parity—indicating that consumers are open to switching if a better-performing or more trustworthy alternative emerges. In today's market, heritage alone isn't enough. Brands must continuously earn relevance through consistency, efficacy, and clear value.

The trend holds across product types. For example, in the Fresh Foods category (fruits, vegetables, eggs), just over 52% of shoppers said *quality* was their top consideration, compared to 26.5% for *price* and under 15% for *brand*. In Personal Care, 43% of buyers pointed to quality (e.g., product effectiveness or ingredients), with *brand* (26%) and *price* (24%) following closely behind. Even in traditionally brand-led categories like beauty, quality still led.

Across categories, the pattern is consistent: quality comes first. The data suggests South African shoppers are discerning and intentional, willing to pay a bit more if it means products that deliver on safety, taste, durability, or comfort. At the same time, they remain alert to price shifts especially when evaluating comparable brands.

## Why This Strong Tilt Toward Quality?

The data makes one insight unmistakable: quality is king. When asked to identify their single most important purchase driver across ten FMCG categories, over 40% of respondents selected quality across categories making it the clear leader, well ahead of price (25%) and brand (20%). This hierarchy held across diverse categories, from personal care and packaged foods to household staples.

The reason is intuitive: many of the items people buy affect their health, hygiene, and household wellbeing. Whether it's maize meal, body lotion, or cooking oil, consumers are making high-stakes choices. Products must deliver on safety, performance, and consistency. In effect, shoppers are voting for trust.

Even among those who selected price as their top factor, many only do so within brands they perceive as meeting a quality threshold. This value-for-money mindset is shaping a new purchase calculus: affordability, yes but only if quality

isn't compromised. A cheaper detergent or food item that underperforms won't earn repeat purchase. Shoppers are willing to wait for deals on their preferred brand or stretch their budgets slightly to avoid disappointment.

Brand loyalty, in this context, has become conditional and transactional. Across all categories, brand was selected as the top driver by only 1 in 5 shoppers. Even in traditionally brand-heavy segments like beauty and alcohol quality consistently edged out brand image as the deciding factor. In categories like dairy, staples, and fresh foods, brand mattered to fewer than 15% of respondents.

These dynamics should be a wake-up call for FMCG marketers: **heritage alone doesn't secure loyalty.** Brands must prove their value with each purchase. When consumers detect a slip in quality or a competitor offers better value they are quick to switch.

## Brand Loyalty

Has become conditional and transactional. Across all categories, brand was selected as the top driver by **only 1 in 5** shoppers



Notable category nuances further reinforce this point:

- In beauty and personal care, quality leads, but brand carries slightly more weight (selected by ~31%) than in other segments, suggesting emotional or sensory associations still matter but only if the product performs.
- In alcoholic beverages, brand affinity rivals price as a motivator, but quality (often judged by taste) still leads.
- In fresh foods, dairy, and staples, brand relevance is marginal quality and price dominate outright.

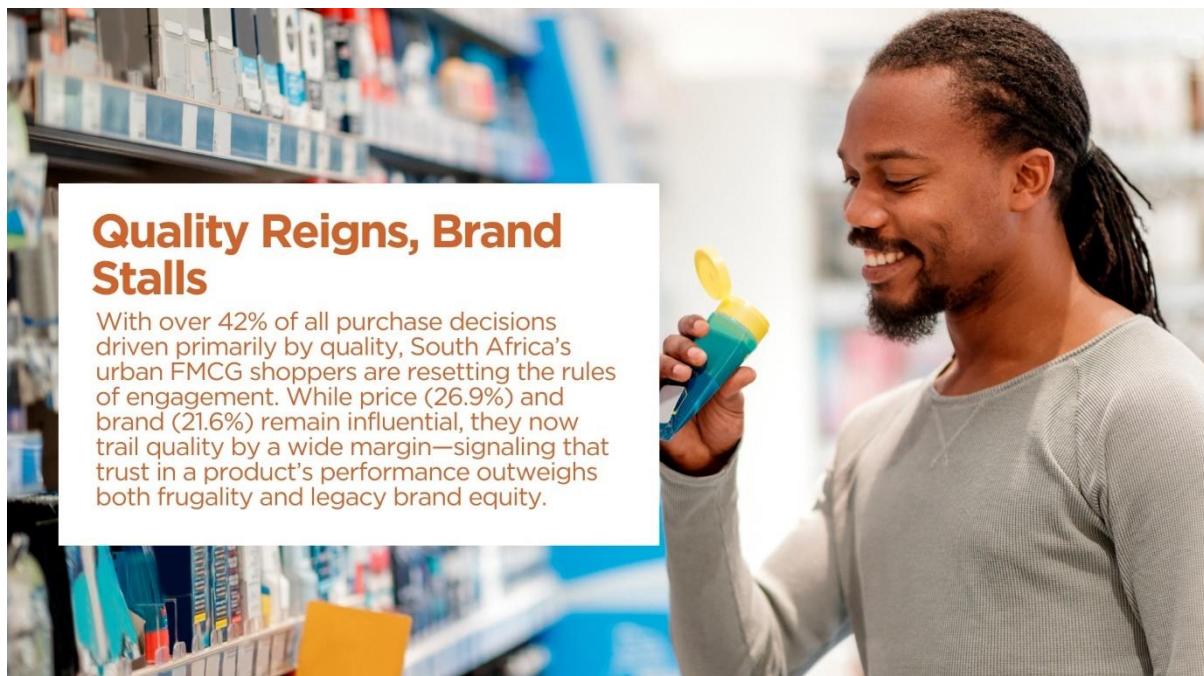
- In snacks and soft drinks, there is some brand loyalty (linked to taste and routine), but shoppers remain highly responsive to specials and promotions.

Ultimately, the data paints a picture of a savvy, discerning, and quality-driven consumer base. These trends mirror broader patterns observed in the FMCG sector. As NielsenIQ has noted, South Africa remains one of the [most price-sensitive markets globally](#) but today's consumers increasingly reject low-cost options that don't meet their expectations.

This shift carries two key implications:

1. **Cutting corners on quality is a false economy.** South African consumers are quick to notice and quicker to churn. Reputational damage from poor product performance travels fast in tight-knit, digitally connected communities.
2. **Quality can justify a price premium, if it's clearly communicated.** Whether through packaging claims, marketing, or visible product upgrades, brands that signal reliability and efficacy can maintain pricing power, even in cost-conscious segments.

In a competitive and complex market, trust and quality have become the new currency of loyalty. Brands that understand and act on this shift will not only survive, but thrive.



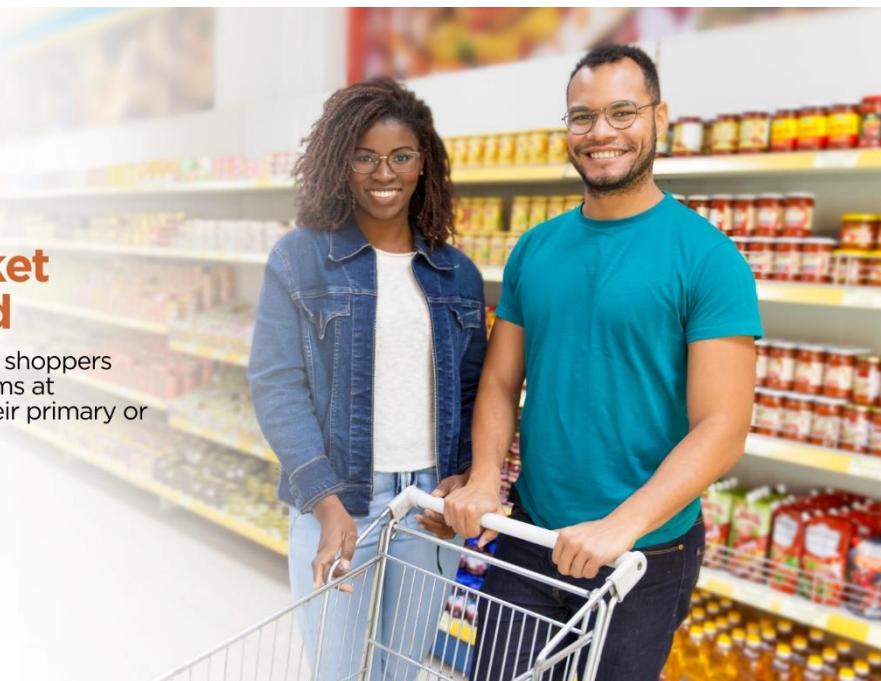
## Retail Channels: Supermarket Stronghold vs. Informal Lifelines

If quality is king in what people buy, where they buy it is another critical piece of the puzzle. The data reveals a striking trend in shopping channels: Formal retail (especially supermarkets) dominates FMCG purchasing in urban South Africa, yet **informal and traditional channels continue to play a substantial supporting role**. The modern shopper toggles between glossy supermarket aisles and neighborhood spaza shops, leveraging the advantages of each.

Let's start with the supermarkets. In our survey, for nearly every category, the **single most common place to purchase was a supermarket chain**. When asked "Where do you typically buy [category] products?", a majority of respondents included supermarkets in their answer for most categories. In fact, across categories like dairy, fresh foods, personal care, and household goods, roughly 60–70% of shoppers reported buying these items at supermarkets as their primary or frequent channel. For instance, about 66% of dairy buyers and 68% of fresh produce buyers said they use supermarkets, as did ~64% for both personal care and household cleaning products. Supermarkets also command about 63% of packaged food shoppers and 62% of snack buyers.

### Supermarket Stronghold

Roughly **60-70%** of shoppers reported buying items at **supermarkets** as their primary or frequent channel.



This pattern underscores that large formal retailers are the go-to source for the bulk of FMCG needs. It makes sense – supermarkets offer one-stop convenience, wide product ranges, and (usually) competitive prices through scale and promotions. Urban consumers especially rely on them for big weekly or monthly shopping trips. Even among lower-income shoppers, supermarkets are popular

for staples when accessible, thanks to perceived price savings on bulk buys. Recent industry figures back this up: a recent retail report noted that supermarkets held steady at about 57% market share of FMCG sales by value in South Africa, dwarfing the contribution of traditional independent stores. Our data echoes this dominance in terms of consumer footfall.

However, the story doesn't end there. **Informal and independent outlets still capture a significant share of transactions**, affirming their enduring importance in South Africa's retail fabric. In categories like alcoholic beverages and beauty products, supermarkets' share was under 50% – meaning the majority of shoppers in those categories rely on other channels. Likewise, for non-alcoholic drinks, only about 55% use supermarkets, with nearly 45% sourcing their sodas, juices, and water from alternatives like small shops or street vendors. Even in staples and packaged foods, roughly one-third of consumers buy at least some of these goods outside the supermarket sphere.

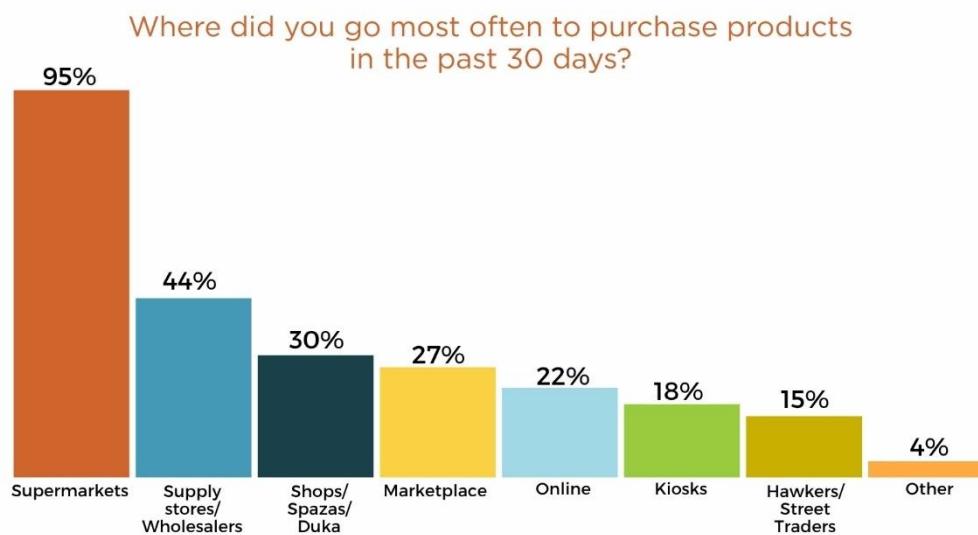


Figure 2: Supermarkets clearly dominate in most categories – yet informal/traditional trade holds a notable share, especially in Alcoholic Drinks and Beauty Products. Online shopping remains marginal overall, except in Beauty where nearly 20% of shoppers have bought online.

The **informal/traditional channels** include a variety of outlets: spaza shops (tiny neighborhood groceries), kiosks and street hawkers (selling snacks, produce, etc.), open-air markets, and wholesale or “cash & carry” supply stores often used by small traders and consumers alike for bulk deals. Collectively, these channels serve as convenient, local, and sometimes cheaper sources for

day-to-day needs. Our findings show that in alcohol purchases, for example, about 41% of respondents buy from informal or wholesale outlets (bottle stores, local taverns, or wholesalers), roughly matching the 44% who use supermarkets for alcohol. In snacks and confectionery, around 27% buy from spazas or hawkers (grabbing chips, sweets or bread on the go), complementing the 63% who go to supermarkets. Staple foods like maize flour and cooking oil see about 23% of shoppers relying on informal shops or markets – a significant minority, potentially driven by need for small-quantity purchases and ease of credit at informal retailers. Even in categories like household cleaners and [personal care](#), around one-quarter of consumers use informal channels in addition to supermarkets, perhaps to avoid long trips for a bar of soap or to patronize trusted local vendors.

Why do [informal](#) channels persist, even for the urban, mobile-connected consumers in our sample? The **top reason is convenience and proximity**. Many South Africans live in townships or neighborhoods where the nearest big supermarket might be a minibus taxi ride away, but a friendly corner spaza is a two-minute walk. For small, frequent purchases – a loaf of bread, a sachet of washing powder, a cool drink – these micro-retailers are indispensable. They often sell in small pack sizes that suit tight budgets (e.g. single-use packets of cooking oil or shampoo), extend credit to known customers, and operate flexible hours. There's also a community aspect: supporting local shopkeepers and the informal economy is ingrained in the culture.

It's worth noting that [informal does not necessarily mean insignificant](#). Though each spaza shop's turnover is tiny relative to a supermarket, the combined volume of the thousands of spazas and street vendors is substantial. Nielsen has found that 30%+ of FMCG volume in South Africa has been sold on promotion in supermarkets, but outside the formal realm, everyday low pricing or bargaining might be happening in informal trade. The writing on the wall is that modern trade will continue to expand. Still, as our survey confirms, companies cannot ignore the informal retail touchpoints – they remain critical for reaching consumers in certain categories and regions. For manufacturers, ensuring availability and tailored packaging for informal outlets can help maintain brand presence where supermarkets don't reach or when shoppers run out between grocery trips.

And what about **e-commerce and online shopping** for FMCG? By 2025, one might expect digital grocery to be taking off. Indeed, globally, online FMCG sales

are growing fast (projected to account for over 10% of market share in coming years). Our survey shows very low uptake of online channels for daily consumer goods – typically in the low single digits percentage-wise for most categories. The one exception is Beauty products, where a notable ~20% of shoppers reported buying items like cosmetics or perfume online. Beauty is often a vanguard for e-commerce (due to niche products and willingness to seek variety or better prices online), so this finding tracks with global patterns. For other categories – groceries, snacks, household supplies – only about 1-5% of respondents had used online platforms (such as chain grocers' delivery services or e-commerce sites like Takealot). South Africa's online grocery infrastructure is improving, but barriers like delivery logistics, fees, trust, and ingrained shopping habits are keeping most shoppers in physical stores for now. Still, the survey hints that younger, digitally savvy consumers are experimenting with online purchases particularly for specialty items (potentially imported beauty brands or bulk deals found on apps). This is a space to watch: as connectivity and comfort with e-commerce grow, we may see more FMCG activity online in the near future.



## Supermarkets Dominate Retail Channels

Formal retail is king for most purchases. Large supermarket chains capture roughly **60-70%** of reported purchases in categories like dairy, fresh foods, personal hygiene, and household care, making them the most preferred shopping destinations.

**Implication for stakeholders:** For retailers, the channel mix underscores the need for an omnichannel presence. Major chains have an edge, but they should continue investing in township formats, smaller express stores, or partnerships with spaza networks to capture that remaining informal spend. For manufacturers, route-to-market strategies must encompass both the big chains *and* distribution into informal trade. Products might need dual packaging strategies – larger economy packs for supermarket shoppers vs. small sachets or

single units for spaza sales. Brands that successfully bridge formal and informal markets will maximize reach. Additionally, as online grocery slowly gains traction, advances in e-commerce (especially for non-perishable and premium items) can capture the customer segment seeking the convenience of delivery. The overarching message is to meet consumers where they are: in South Africa, that could be the mall supermarket, the corner shop, or increasingly, a smartphone screen.

## Conditional Loyalty: Brands Must Continuously Earn Consumer Trust

The days when a South African shopper would stick with a favorite brand through thick and thin appear to be fading. Our research paints a picture of “conditional brand loyalty” – consumers certainly have preferred brands, but their loyalty is contingent on ongoing performance and value. In short, brand loyalty is earned, not assumed.

As detailed earlier, relatively few respondents (generally 15–25%) named *brand* as the top factor influencing their purchases. However, this doesn’t mean brand equity doesn’t matter at all – rather, it means that brands are important but not *sufficient* to win a purchase by themselves. Shoppers might *start* with a brand they trust, but if that product doesn’t live up to expectations (in quality or price), they are increasingly willing to drop it and try something else.

Evidence of this conditional loyalty emerges strongly in categories like Beauty, Personal Care, and Alcoholic Beverages, where brand heritage has traditionally been a big purchase driver. In our data, a significant subset of consumers in these segments do care about brand name – e.g. 25% of alcohol shoppers, about 30% of beauty shoppers and 26% of personal care shoppers said brand was their #2 factor (after quality). Many have long-time favorites in perfumes, lotions, or beers, for instance. But what’s telling is the gap between those who *favor* a brand and those who will stick with it no matter what. If brand is second to quality, if their go-to shampoo changes its formula and no longer works as well, they’ll start looking for alternatives. If their preferred beer is suddenly priced far above competitors, they’ll gladly try a different brew.

Industry research supports this fluid approach to loyalty. Nielsen’s analysis of promotion effects found South African consumers are highly deal-conscious and increasingly willing to experiment. In today’s challenging economic climate,

South African consumers are increasingly prioritizing value over brand allegiance. According to [NielsenIQ's Consumer Outlook 2024](#), a staggering 99% of consumers have altered their FMCG shopping habits to save money, with 48% switching to lower-priced options. This shift indicates a growing willingness to explore unfamiliar brands if they offer better value.

Further emphasizing this trend, PwC's [Voice of the Consumer Survey 2024](#) reveals that 44% of South African consumers would consider switching from their preferred brands to more affordable alternatives. This behavior is not limited to price considerations alone; social influences also play a role. Many respondents in our survey reported trying new brands due to promotions or recommendations seen on social media platforms.

## Voice of the Consumer - Brands

Generally **15-25%** named brand as the top factor influencing their purchases.

**25%** of alcohol shoppers, about **30%** of beauty shoppers and **26%** of personal care shoppers said brand was their **#2 factor** (after quality).



The economic pressures of inflation and unemployment have intensified this behavior. With 75% of consumers ranking inflation as the top risk impacting their spending, there's a clear indication that frugality often takes precedence over brand loyalty. In this environment, brands must continuously demonstrate value and relevance to retain their customer base.

That said, brand loyalty isn't dead – it's just more demanding. When a brand consistently delivers quality at a fair price, consumers *do* reward it with repeat purchases and advocacy. Our data suggests one area where brand still carries heavy weight is trust and perceived quality. Many consumers shorthand a known brand as a proxy for quality – especially when they don't have detailed product information. In categories with perceived health or hygiene stakes such

as toothpaste, soap, and household cleaners, often legacy brands continue to perform strongly. This is mirrored in our data, where quality consistently ranks as the top purchase driver, often surpassing both brand familiarity and price. For many consumers, certain brands symbolize efficacy and trust associations built through decades of effective advertising and consistent product performance.

However, even in these strongholds, brand loyalty is conditional. Our data shows that across categories, a significant portion of consumers still choose alternatives based on **price promotions or availability**, and brand no longer holds a commanding lead as a decision driver. This signals that trust alone is not enough: if a challenger brand can demonstrate comparable or superior quality while offering price or lifestyle advantages even deeply embedded habits are open to disruption.

The success of [local players](#) in niche categories like craft beverages or artisanal skincare illustrates this dynamic. By delivering unique value propositions whether functional, ethical, or sensory they are steadily eroding the edge of global incumbents.

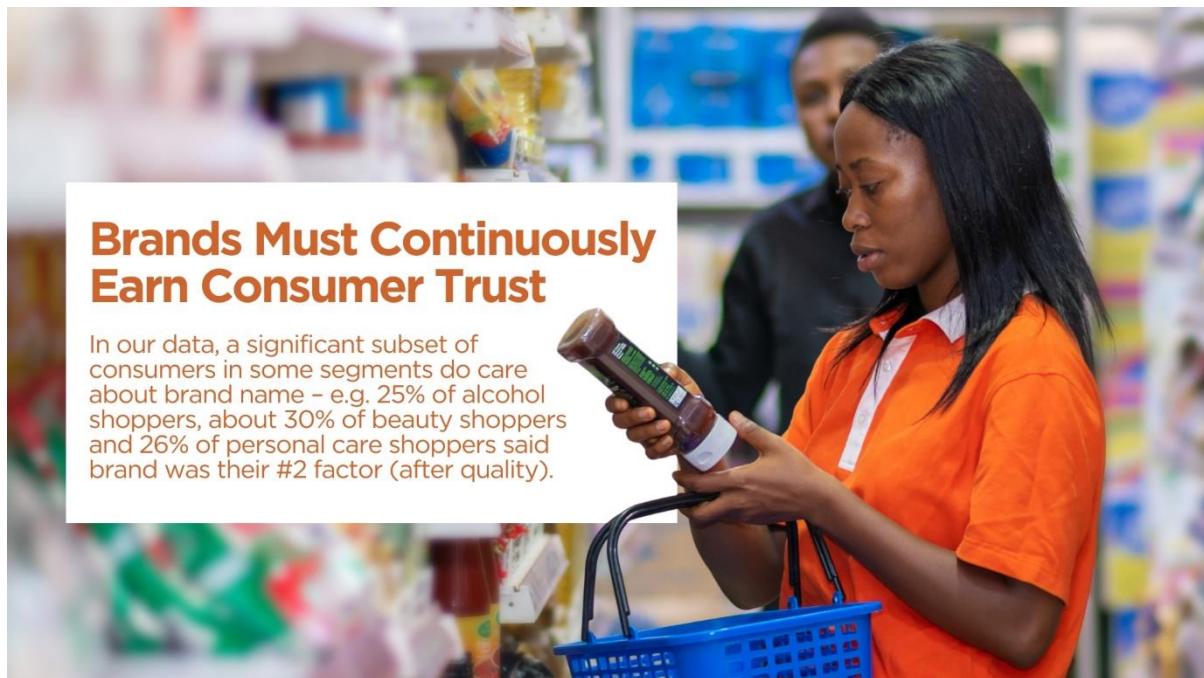
For FMCG manufacturers, the implication is clear: **invest in product quality and authentic grassroots customer engagement to maintain loyalty. This is not the time to rest on heritage laurels alone.** South African consumers are signaling that each purchase is a conscious choice, not an automatic one. Brands should foster two-way communication via social media, customer service, loyalty programs to reinforce trust and listen to feedback. Regularly highlighting quality improvements, sourcing transparency or community initiatives can strengthen the emotional connection that turns repeat buyers into true loyalists.

Conversely, pricing strategy needs to be carefully calibrated. While premium brands can charge more for higher quality, sudden or steep price increases are risky. As noted, consumers will switch in a heartbeat if they feel gouged.

In sum, **brand loyalty in 2025 behaves more like a subscription that consumers renew continuously.** Each time a shopper stands in the aisle (or browses online), they “renew” a brand by buying it again – or they don’t.

Companies must fight for that renewal by delivering on promises and staying attuned to consumers’ evolving expectations. The upside of this new reality is that it also presents opportunities for challenger brands and innovations: if you can offer a better solution, even entrenched consumers might give you a

chance. The playing field, while favoring incumbents, is more meritocratic than ever when it comes to winning South Africans' loyalty.



### Brands Must Continuously Earn Consumer Trust

In our data, a significant subset of consumers in some segments do care about brand name – e.g. 25% of alcohol shoppers, about 30% of beauty shoppers and 26% of personal care shoppers said brand was their #2 factor (after quality).

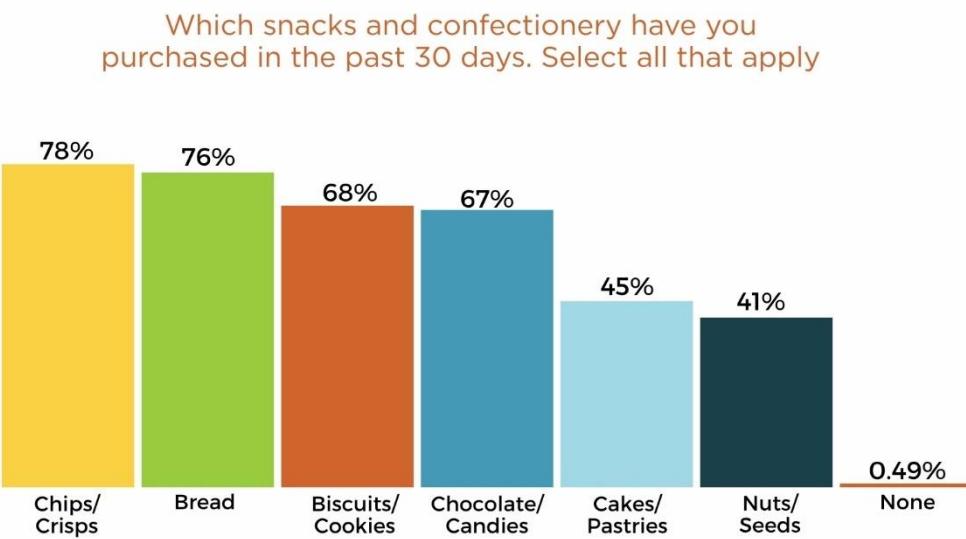
## The Convenience Revolution: Ready-To-Eat and On-The-Go Lifestyles

Another major theme emerging from GeoPoll's study is the growing premium South African consumers place on convenience – in both products and shopping habits. As urbanization increases and work-life schedules get busier, people are looking for ways to save time and effort in their daily routines. This is manifesting in a noticeable shift toward ready-to-consume products, quick meal solutions, and hassle-free shopping options.

One clear indicator is the surge in ready-to-eat (RTE) and ready-to-drink products in shopping baskets. Among respondents who bought any packaged food items, a striking **62% had purchased ready-to-eat meals** in the past month – far more than those who bought traditional canned foods or frozen foods (each of those was under 25%). Ready-to-eat meals in this context include things like instant noodles, heat-and-eat dinners, and pre-cooked foods that just require reheating. The popularity of these offerings suggests that many consumers – especially younger adults or working parents – are embracing shortcuts for meal prep. Rather than cooking entirely from scratch, they'll supplement with a prepared lasagna or a microwaveable pap and stew, for example, on busy weekdays. This aligns with broader trends: Kantar reports that even in a contracting economy,

niche convenience segments like ready-to-eat chilled desserts and meal kits saw growth in South Africa, driven by higher-income households willing to pay for time-saving options.

Snack habits further illustrate the convenience trend. As noted in the Key Trends, nearly 3 in 4 respondents buy bread regularly (for quick breakfasts or lunch sandwiches) and a similar share grab chips or crisps (71%) as easy snacks. Biscuits, cookies, and chocolates were also extremely common purchases (around two-thirds of snackers indulged in these). These items are the quintessential grab-and-go foods – ready to eat with zero prep. The high incidence suggests a snacking culture where convenient treats and staples are part of daily life. It's not just indulgence; it's also practicality. A piece of bread or a packet of chips can stave off hunger during a busy workday or while commuting. The fact that bread appeared in the "Snacks & Confectionery" section of our survey highlights how a basic staple doubles as a convenient snack in many households.



On the beverage side, convenience and refreshment go hand in hand. Grab-and-go drinks – like bottled sodas, juices, and energy drinks – top the charts in non-alcoholic beverage purchases. Many respondents mentioned picking up a cold drink from a fridge at the office or at a roadside stall, reflecting the on-the-move consumption pattern. Energy drinks being purchased by 62% of beverage shoppers is telling; these are often used as quick pick-me-ups during long work hours or study sessions. Ready-to-drink beverages are clearly [gaining traction](#),

with energy drinks and bottled refreshments ranking among the most frequently purchased. While our data doesn't break out iced teas and coffees specifically, the high uptake of on-the-go drinks underscores this broader shift.

The data reveals a distinct preference among South Africa's urban shoppers for convenience-oriented shopping patterns not just in what they buy, but how and where they buy it. Rather than consolidating their household needs into a single large monthly shop, many consumers are practicing "micro-shopping", sourcing FMCG items from multiple channels including supermarkets, spaza shops, petrol station marts, and supply stores. In fact, our respondents report shopping across an average of 6 different channels, illustrating a fragmented but intentional approach to purchase planning.

This fragmentation is often driven by two factors:

- Cash flow cycles, which determine when consumers have money in hand
- A desire for convenience and freshness, encouraging more frequent, smaller trips

While online grocery remains marginal in this sample, shoppers are clearly leaning into hyper-local, quick-access formats, particularly for top-up and essentials runs.

Though our data doesn't explicitly cover delivery apps or click-and-collect usage, the broader trend toward time-saving, low-effort solutions is clearly embedded in both channel choice and product preferences. These behaviors echo findings from global studies, such as a NielsenIQ survey where 40% of South Africans said they want products that make life easier a sentiment our data supports in practice.



*Rather than consolidating their household needs into a single large monthly shop, many consumers are practicing “micro-shopping”, sourcing FMCG items from multiple channels including supermarkets, spaza shops, petrol station marts, and supply stores.*

**Implications:** The convenience trend offers both a challenge and an opportunity for FMCG businesses. On one hand, traditional products might lose share if they require too much effort – for instance, dry beans versus canned beans, or raw ingredients versus ready meals. Brands in those spaces may need to innovate or emphasize other virtues (like health, homemade taste, or cost savings) to retain consumers who are tempted by convenience. On the other hand, there's ample room for new convenient products to thrive. Think meal kits tailored to local cuisine, more flavors of instant porridge, or “on-the-go” packaging for staples (like resealable pouches). The growth of convenience also means new channels gain importance – e.g., stocking products in forecourt convenience stores and partnering with delivery apps for visibility.

It's also worth noting that convenience doesn't override quality; it complements it. The most successful convenience foods in our survey (like certain ready meals) are those that *also* delivered on taste and quality. Consumers won't accept convenience at the expense of quality – they want both. The same goes for price: while many are willing to pay a bit extra for time-saving products, those products still need to be reasonably priced. The proliferation of choices means if one brand's offering is too costly, a cheaper (yet convenient) rival is likely around the corner.

In summary, South Africa's FMCG market is seeing a “convenience revolution” wherein consumers actively seek products and services that simplify their busy lives. Brands that can integrate convenience into their value proposition – without sacrificing quality or affordability – will ride this wave successfully. The underlying driver is a lifestyle shift: more urban living, more women in the workforce, longer commutes in big cities, and a digitally connected culture that prizes instant gratification. This is reshaping consumption in a way that presents exciting innovation opportunities in the FMCG space.

## Conclusion: Turning Data into Decisions – At Speed and Scale

South Africa's fast-moving consumer goods landscape is being reshaped not only by inflationary pressures and shifting incomes, but by an increasingly discerning, quality-conscious, and convenience-driven urban consumer.

GeoPoll's latest study, conducted in a matter of days through our **Tucho**

**mobile panel**, captures these nuanced behaviors in real time from where people shop, to what they buy, and why they choose one brand over another.

This rapid research cycle demonstrates what's possible when agile data meets pressing business needs: **in-field in under 72 hours, with results delivered to clients almost immediately**. In a market that's evolving week by week, agility is no longer a luxury, it's a necessity.

Key takeaways for **FMCG stakeholders** include:

- **Keep Quality at the Core:** Our data affirms that quality is the top purchase driver across nearly every FMCG category. Consumers may be price-sensitive, but they are unwilling to compromise on the integrity of what they consume or apply to their bodies. Brands must clearly communicate quality whether it's through ingredient sourcing, manufacturing standards, or product performance. When price becomes a tie-breaker, trust in quality becomes the clincher.
- **Compete on Value, Not Just Price:** In one of the world's most price-sensitive markets, it's tempting to focus only on discounts and promotions. With many consumers stretching every rand, it's tempting to default to discounts. But our findings show that **value-for-money** not just low cost is what wins in the long run. Communicate the 'why' behind the price: Is it longer-lasting? More effective? Locally made? When promotions are used, reward loyalty rather than train consumers to expect markdowns.
- **Leverage the Supermarket Stronghold – and Informal Channels:** Supermarkets dominate channel penetration, but spaza shops, supply stores, and petrol marts still play a critical role. GeoPoll's data revealed that consumers shop across an average of six distinct retail channels, showing clear fragmentation. Brands should optimize presence in modern trade, while tailoring pack sizes and formats for informal retail environments where top-ups and convenience buys dominate.
- **Engage and Innovate to Earn Loyalty:** Build a dialogue with consumers. Selective loyalty is the new normal. Consumers are open to trying new brands especially if prompted by promotions, peer influence, or better value. Retaining loyalty means staying fresh: introduce innovations, healthier reformulations, or eco-conscious packaging. GeoPoll's mobile platform also enables interactive consumer feedback loops, creating

opportunities for brands to co-create with their customers and differentiate through listening.

- **Ride the Convenience Wave:** Adapt your product portfolio to cater to the convenience-seekers. This could mean launching ready-to-use variants of traditional products, partnering with meal delivery services, or creating smaller, portable packaging. Emphasize how your products save time or effort – a powerful selling point in marketing messaging. Additionally, consider convenience in the shopping journey: for instance, ensure your products are listed on e-commerce platforms and available via online delivery, even if those channels are small today. The brands that establish a foothold early in emerging channels will have an advantage as those channels expand.



*Supermarkets dominate channel penetration, but spaza shops, supply stores, and petrol marts still play a critical role.*

Above all, this study underscores GeoPoll's unique ability to deliver fast, granular, and actionable consumer insights in even the most dynamic and hard-to-reach markets. Leveraging our [TuuCho mobile panel a purpose-built, mobile-first research platform](#) - we reached thousands of urban, economically active South African shoppers across formal and informal channels alike.

From precise percentage breakdowns on purchase drivers, to demographic patterns in channel preference, to emerging shifts in loyalty and value perception, the richness of this dataset offers a 360-degree view of the FMCG landscape. And we did it in days, not weeks proving that robust insights no longer require long timelines or heavy infrastructure.

In conclusion, South Africa's shoppers have spoken through this survey: *Give us quality we can trust, prices that respect our budgets, and solutions that make our busy lives easier.* The businesses that listen and respond to this call will be the ones that thrive in 2025 and beyond. GeoPoll is proud to provide the intelligence to make that possible, helping you translate data into decisions – and decisions into market success. For a multinational brand planning a go-to-market strategy, a retailer optimizing assortment across touchpoints, or a local challenger seeking growth opportunities, GeoPoll provides the real-time intelligence needed to move with the market, not behind it. At the core of this report is a simple truth: in fast-moving markets, insight advantage is strategy advantage. GeoPoll is your partner in unlocking that edge across South Africa and beyond.

If you'd like to explore how your brand stacks up within your industry, or conduct a similar tailored study in one or more African markets, get in touch with the GeoPoll team. We're ready to help you access the insights that matter most.

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