

# Consumer insights agency KLA reveals the Quarterly Buzz results for Q1 2025

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KLA, the exclusive partner for YouGov in sub-Saharan Africa, has released the ninth edition of the Quarterly Buzz, tracking the brands with the most 'buzz' in the market.

The Quarterly Buzz leverages the YouGov BrandIndex tool, a dynamic platform that consistently evaluates public sentiment of over 200 brands in South Africa across eight categories. Through the BrandIndex tool the top ten performing brands across sectors are highlighted, with the top five brands respectively named within each category.

Employing a comprehensive framework of 16 metrics that span across the marketing funnel, the BrandIndex tool's Buzz metric takes the spotlight. This metric evaluates consumer perception, gauging whether individuals have encountered positive or negative information about a brand in the preceding two weeks. Operating on a scale of +100 to -100, a net score is derived, offering a view of a brand's performance relative to its competitors. These scores are accumulated over a three-month period, forming the basis for the Quarterly Buzz results, with the latest results being measured from 1 January to 31 March 2025.

The top performing brands across all sectors in Q1 of 2025 are:



The first quarter of 2025 reflects the continued strength of the Food, Groceries, and Consumables sector which once again dominated the rankings with five of the top ten brands coming from this category – consistent with historical trends. This period also saw notable shifts among the top 10 brands, driven by rising consumer engagement and brand momentum. Takealot.co.za, (Fuel, Auto Parts, and Services sect alongside Checkers, Shoprite, and PEP Home, recorded significant improvements in Buzz.

As a result, Takealot.co.za climbed four positions to take the top spot this quarter, while KFC and Clicks each advanced two rank positions. Meanwhile, Shoprite and Pick n Pay gained momentum, with Shoprite entering the top 10 as a new entrant, and Pick n Pay making a return to the top 10 after a year. PEP Home also entered the top 10 for the first time, reflecting its rising appeal among consumers.

Takealot.co.za demonstrates a standout performance this quarter, recording improvements across all 16 brand health metrics, which propelled it to the top of the rankings – a position it last held over a year ago. Checkers also noted impressive gains, particularly across top-funnel metrics including Awareness, Ad Awareness, and Buzz, further reinforcing its strong brand presence. Among the new entrants, Shoprite, debuting at sixth place, showed significant improvement across eight of the 16 metrics, including all top-funnel metrics, and key measures like Impression, Consideration, and Current Customer.

PEP Home, appearing in the Quarterly Buzz top 10 for the first time since inception of the Quarterly Buzz, demonstrated growth in ten of the 16 metrics, namely Ad Awareness, Buzz, Word of Mouth, Index, Impression, Quality, Value, Recommendation, Consideration, and Purchase Intent, signalling its growing influence in the value retail space. These significant movements have resulted in Woolworths Food and F1 experiencing a drop in rank position in the current period, with Checkers and Woolworths clothing retaining rank at #2 and #9 respectively.

When delving deeper, sector specific results for Q1 of 2025 is as follows:



Sector specific results for Q1 of 2025 highlight a relatively stable top five within each sector, with a few new entrants across the eight sectors tracked – notably, PEP, MrD and FNB (Insurance) in their respective categories.

In the latest report, specific brand performance reflects dynamic trends in the South African market.

### Shoprite: Strategic growth and enhanced customer convenience

Shoprite recorded notable gains across eight of the 16 brand health metrics this quarter, with strong performance in all top-funnel measures positively impacting both Brand Consideration and Usage. This brand-level performance aligns with broader business growth, as Shoprite Holdings reported a 9.6% increase in merchandise sales, with supermarket sales rising by 10.4% to R107.7bn, supported by increased shopper usage and low internal inflation. Reinforcing its growth ambitions, the brand announced plans to expand its footprint with 32 new Shoprite stores, part of 122 new store openings planned for the second half of the financial year, with a particular focus on USave.

The significant rise in Buzz is also tied to strategic moves such as divesting OK Furniture and House & Home, allowing the brand to sharpen focus on core categories. The brands' strategic growth is matched w

an equally focused customer centric approach, with Shoprite’s Sixty60 delivery service set to expand, increasing convenience for value-conscious consumers and deepening brand loyalty. Beyond commerce, the brand has reinforced its community impact, offering purified water at just R1 per litre and investing over R3m into two new robotics labs in the Eastern Cape to promote digital literacy and education.

### Pick n Pay: Strategic turnaround strategy and elevated customer experience

Between January and March 2025, Pick n Pay generated a wave of positive buzz as signs of a strategic turnaround and renewed customer engagement became clear. As part of its store estate reset strategy, the brand closed underperforming outlets while focusing on profitability and strategic expansion. Its discount brand, Boxer, continued to deliver strong results, reinforcing value-driven growth. A key milestone during this period was the launch of a flagship store in Westown Square, KwaZulu-Natal, offering an elevated customer experience with an expanded fresh produce section, improved product range, and enhanced in-store convenience – signalling a move toward premium positioning.

In line with its renewed customer-centric approach, Pick n Pay also expanded its partnership with FNB, offering loyalty customers up to 30% back in eBucks via delivery and 20% on in-store purchases. This initiative not only boosts spending but also enables deeper insights into customer behaviour for more personalised engagement. Adding to its positive public sentiment, the brand signed a four-year deal as a Tier 1 sponsor of SA Rugby, with community level impact in acquiring naming rights for the national club championship and a new women’s rugby competition – strengthening community impact. Additionally, ongoing sustainability initiatives, including recycling programmes, continue to bolster Pick n Pay’s reputation as a socially responsible retailer.

### Advertising: Driving seamless relevance

With the importance of omnichannel marketing strategies well established, KLA tracked the most recalled channels across various sectors, conducting a study with a nationally representative sample of South Africans to identify the channels that remain top of mind this quarter.



Digital channels continue to dominate channel recall across all sectors tracked in South Africa. Consistently appearing as the most recalled channel, digital includes online searches, platforms such as YouTube and brand websites, reflecting consumers high level engagement with internet-based experiences.

Social media also cements its place in the top three across sectors as a high-impact channel, rivalling the traditional heavyweight, TV. Its strong presence across sectors highlights how social media has become

central to how brands engage with consumers. With this being said, TV continues to maintain a powerful presence, continuing to offer reach and credibility, especially amongst older consumers (55+) across all sectors except for Food and Groceries where pamphlets dominate; and home décor and telecommunications where digital presence still takes precedence. This dominance of digital channels strongly suggests that brands that invest in seamless digital interfaces and personalised online communications are more likely to remain top-of-mind.

Despite digital advances, the in-store experience remains a crucial touchpoint for South African consumer across generations, especially in the retail and FMCG sectors (Clothing and Footwear, Groceries, Home décor, alongside featuring in the top five for the QSR sector as well). This highlights the importance and value of on-the-ground ambassadors (which includes trained staff) in supporting to shape customer experience and preference.

Word of Mouth emerges as a strong channel, particularly in the QSR and telecommunications sector, where consumers reliance on peer recommendations forms a critical role in brand consideration and decision making. Interestingly, this is heightened for 18 to 24-year-olds across five of the sectors, namely Banking, Insurance, QSR, Clothing and Footwear, and Food and Groceries. The enduring influence of social proof and trust-based recommendations highlights the importance and role of brand reputation. This is not surprising with Gen Z's well-studied preference for authentic storytelling – one that resonates with their experiences and values driving emotional connection, trust and loyalty.

Radio and billboards, while considered more traditional, still maintain a significant recall across age groups Banking, Insurance, Telecommunications and Fuel/auto parts and services.

While featuring just beyond the top five, reward programmes do support channel recall across all sectors, except for insurance, QSR, and telecommunications. Loyalty programmes do serve as effective tools for retention and habit-forming behaviour, showing particular strength for older consumers (55+).

These findings underscore the importance of an integrated, omnichannel marketing strategy, with a tailored mix of digital, traditional and experiential media. This mix is impacted by stage of life in supporting trust building and connection for consumers. For brands, understanding where consumers are most engaged is essential to staying top-of-mind in South Africa's dynamic market landscape.

While digital tools and evolving AI offer powerful opportunities for scale and efficiency, trust, credibility, and peer recommendation remain essential drivers of influence, especially among younger audiences. While peer recommendations continue to remain an important channel for consumers, the ability to stand out and personalise experiences in ways that technology cannot match is critical.

In an increasingly crowded and converging market, the ability to understand what truly resonates with consumers is not optional; it is essential. As younger, tech-immersed generations begin to influence purchasing decisions, brands must enhance their understanding and evolve their marketing strategies to meet heightened digital expectations while still forging meaningful human connections. This highlights the critical role of market research in helping brands remain relevant, adaptable, and equipped to deliver seamless, personalised experiences that foster genuine engagement and long-term growth to a dynamic ever-changing consumer.

For more information about the Quarterly Buzz or KLA's YouGov Offering (BrandIndex and Profiles) visit [www.kla.co.za](http://www.kla.co.za) or contact [rakheen@kla.co.za](mailto:rakheen@kla.co.za).

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