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Brand Planning
Unlock Strategic Foresight

Bateleur
Vantage Point

The Mood of *South Africa*

A Market Research Study of South African Consumer, Employee, and Societal Sentiment

Bateleur Brand Planning: Vantage Point

Data Collection Period: October 2025 to January 2026

Methodology: Online via social media and Bateleur database

Sample: 1 298 middle-to-upper income South Africans

An Introduction to the *Vantage Point* Survey Results

Dear Reader,

South Africa in 2026 is a nation of paradoxes. We are optimistic but overloaded. Ambitious but anxious. Digitally connected but increasingly guarded.

We surveyed 1 298 South Africans across generations, races, and provinces to understand not just what they think, but how they feel, what they fear, and what they're reaching for.

Success has been quietly redefined. The corner office, the luxury car, the international travel - these aspirations have been displaced by something more fundamental: health, peace of mind, and the simple dignity of living debt-free. Across every demographic, 'living in a safe, crime-free community' emerged as the number one goal, superseding luxury indicators.

The generational fault lines are real. Boomers are the stability generation - politically frustrated but personally content. Millennials are carrying the heaviest combined load: debt, career pressure, and parenting stress. Gen Z is not apathetic; they are ambitious under pressure, desperate for financial independence but blocked by an education system they feel failed them.

And through it all runs a digital thread. We are a WhatsApp nation, 94% of us belong to group chats, yet we're locking down our social media accounts, retreating to private spaces, and approaching AI with a mixture of curiosity and caution. We are connected but guarded.

Bateleur Brand Planning (Pty) Ltd is a leading South African market research company dedicated to tracking shifting consumer and employee sentiments. The **2025/26 Vantage Point Survey** is an annual, deep-dive study tracking matters of general interest to society, providing businesses with actionable, data-driven intelligence relevant to the local landscape. For more information on this study or to explore tailored research solutions, you can: -.

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Key Findings *at a Glance*

Happiness is generational
Boomers are South Africa's happiest generation (mean 3.9), while Gen Z carries the heaviest emotional load (mean 3.5).

Success has been redefined
Being healthy (66%) and living debt-free (59%) now outrank traditional status markers like executive titles (14%) and fame (2%).

The cost of living is killing our joy
70% of respondents name the economy as their primary source of anxiety, followed by corruption (67%) and violent crime (62%).

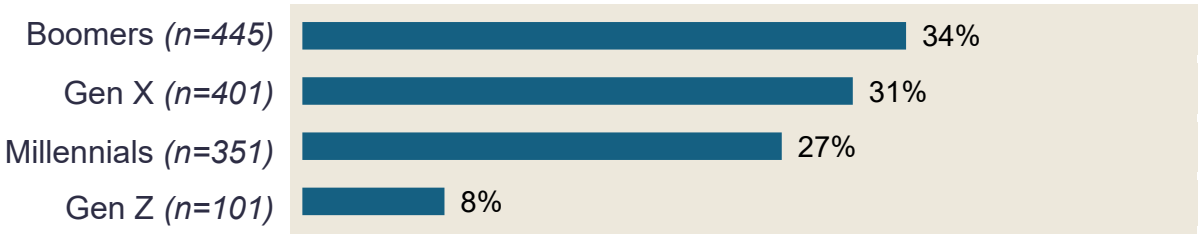
Communication runs on WhatsApp
94% of South Africans belong to WhatsApp community groups.

IDENTITY & SOCIAL COHESION

The Generational Landscape

POPULATION DISTRIBUTION BY GENERATION

Base: All respondents (n=1 298)



Boomers (62+ years): The stability generation. Retired, financially secure, and politically frustrated. South Africa's happiest generation.

Gen X (46 to 61 years): The sandwich generation. Caught between caring for ageing parents and supporting their own children.

Millennials (30 to 45 years): The pressure generation. Carrying the heaviest combined load of debt, career pressure, and parenting stress.

Gen Z (18 to 29 years): The digital natives. Ambitious and tech-savvy but blocked by an education system they feel failed them.

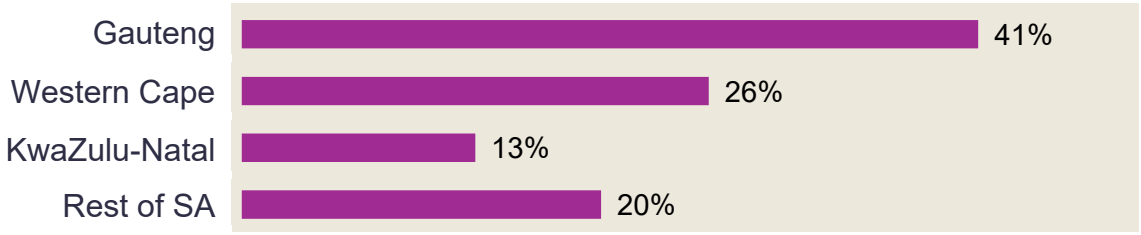
The Racial Portrait

RACIAL COMPOSITION OF SURVEY PARTICIPANTS

RACE	SHARE
White	54%
Black	27%
Coloured	10%
Asian	6%
Prefer not to say	3%

Provincial Spread

PROVINCIAL DISTRIBUTION OF SURVEY PARTICIPANTS



KEY INSIGHT

South Africa is not a monolith. Understanding the country requires understanding its generations, its races, and its provinces - each with distinct pressures and aspirations. Keep an eye out for the Vantage Point article *"Provincial Profiles – The Three South Africa's"*

The Happiness Scale

SELF-REPORTED HAPPINESS LEVELS

Question: In general, how happy are you?

70%	10%	20%
HAPPY OR VERY HAPPY	UNHAPPY OR VERY UNHAPPY	INDIFFERENT

Happiness Gap: Men vs. Women

MEAN (AVERAGE) IN HAPPINESS SCORE BY GENDER

3.9 / 5.0	3.6 / 5.0
MALE	FEMALE

Men lead women on happiness, a gap that persists across all measures of wellbeing and life satisfaction.

Happiness by Generation

MEAN HAPPINESS SCORE BY GENERATION

GEN Z	MILLENNIALS	GEN X	BOOMERS
3.5	3.6	3.6	3.9

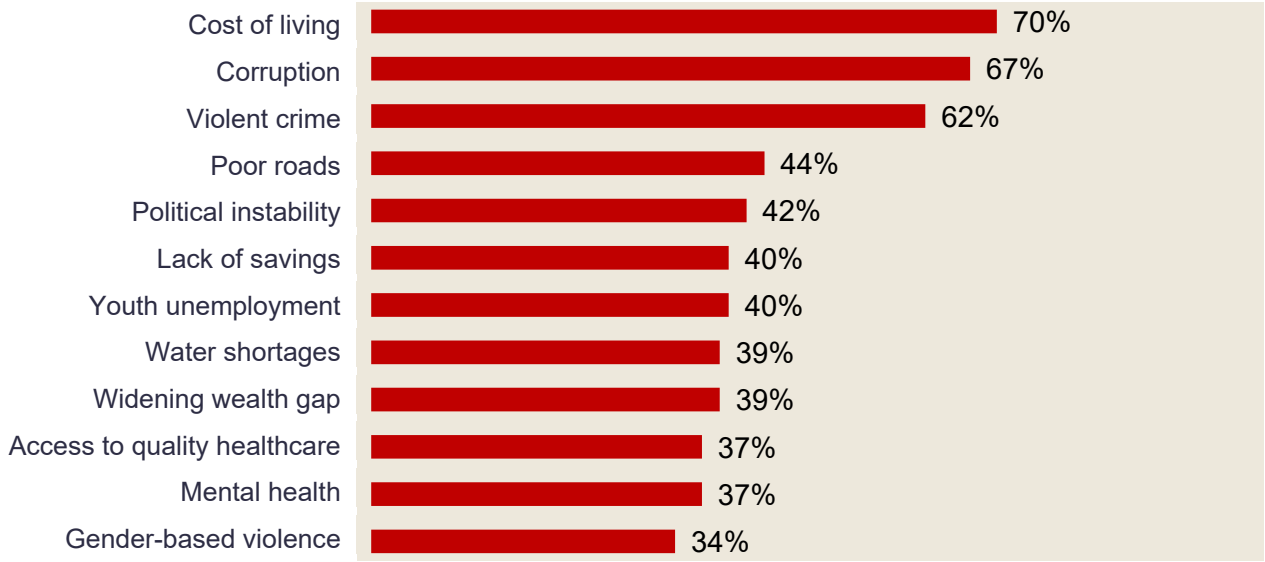
Boomers are South Africa's happiest generation. Retired, financially secure, and less exposed to the pressures of work and parenting.

The Anxiety Rankings

What keeps South Africans awake at night?

TOP FEARS & CONCERNS

Question: Which of the following issues are your biggest concerns or fears?



KEY INSIGHTS

The cost of living isn't just an economic issue; it's an emotional one. 70% of South Africans name it as their primary source of anxiety.

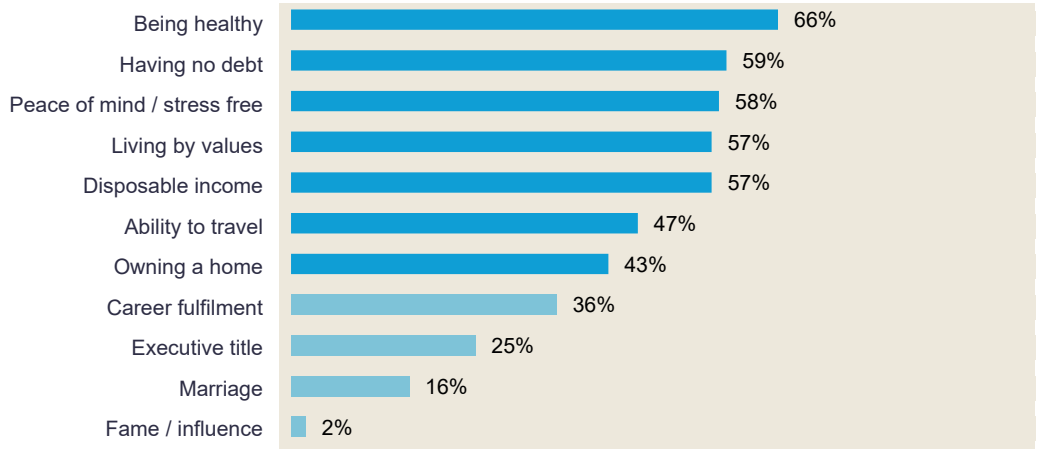
GBV is reported as a greater concern among females (42%), younger generations, particularly Gen Z (50%) and Millennials (44%), as well as among Black (55%) and Coloured (50%) respondents.

What South Africans *Are Reaching For*

Forget the corner office. South Africans have quietly redefined what it means to be successful.

WHAT MATTERS MOST IN DEFINING SUCCESS

Base: All respondents (n=1 298)
Question: What is important to your definition of success?

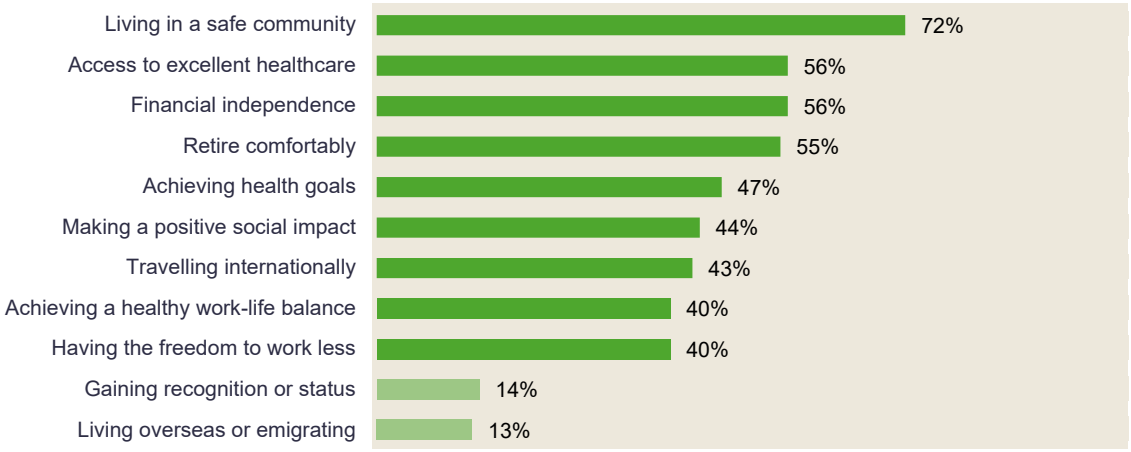


KEY INSIGHTS

Success has shifted from status to peace of mind. Health, safety, and debt freedom now matter more than titles, travel, or luxury. Marriage is more important to men (22%) then to women (11%).

TOP GOALS AND DREAMS

Question: Which of the following goals, dreams or fantasies are most important to you?



DIGITAL LIFE & EMERGING TECH

Connected, *but Weary*

If one platform shapes South Africa's digital landscape, it's WhatsApp. Yet beneath that constant connectivity runs a quiet current of mistrust.

The WhatsApp Nation (94% of South Africans belong to WhatsApp groups)

Question: Are you a member of any WhatsApp community or group chats?

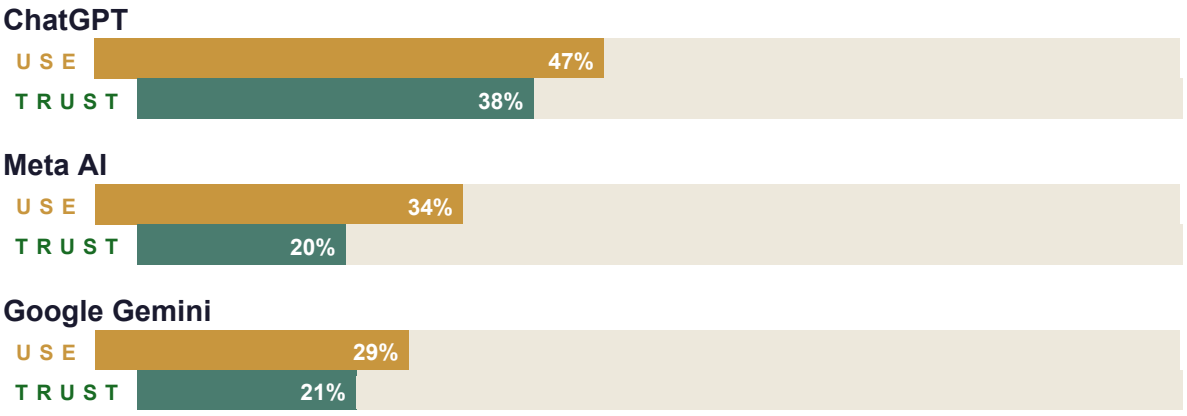
53%	41%	6%
YES — SEVERAL GROUPS	YES — SOME GROUPS	NO - NO GROUPS

AI: Adoption Outpaces Trust

South Africans are using AI faster than they trust it. The gap between usage and trust is significant and most pronounced among older generations.

AI PLATFORM USAGE VS. TRUST

Usage = Which AI platforms do you use regularly (once a week or more)?
Trust = Which AI platforms do you trust?

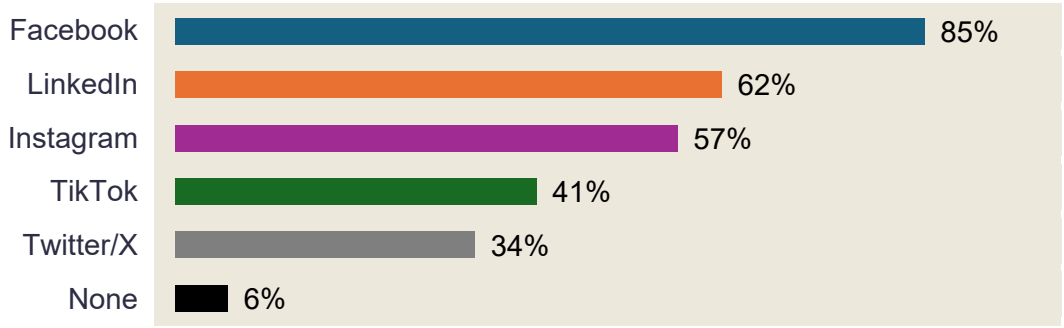


28% of South African's aren't using AI. 36% of South Africans trust no AI platforms at all, and 58% are concerned (moderately or very concerned) about the dangers of AI.

The Guarded Internet

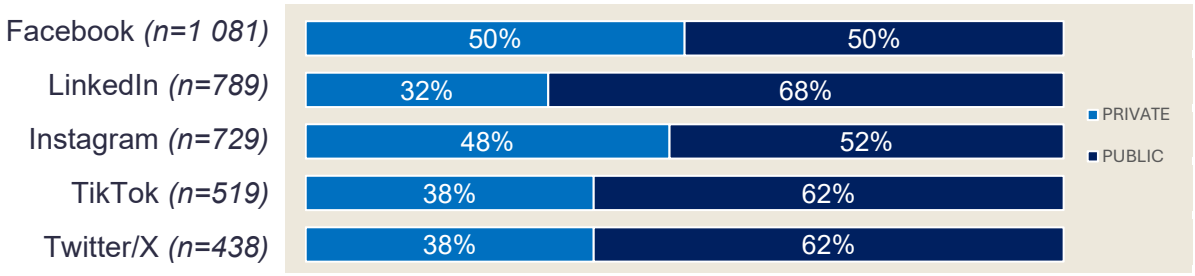
SOCIAL MEDIA ACCOUNTS USED

Base: All respondents (n=1 298)
Question: Which of the following social media platform do you have accounts with?



ACCOUNT VISIBILITY BY PLATFORM

Base: Platform users
Question: Of the social media accounts you have, which are set to public and which are private?



ACTIVENESS ON SOCIAL MEDIA ACCOUNTS

Base: Platform users
Question: Of the social media platforms that you have accounts with, indicate how active you are on each account.

	FACEBOOK	LINKEDIN	INSTAGRAM	TIKTOK	TWITTER/X
Just browse through content without engaging	37%	36%	37%	40%	40%
Tend to like / comment or share posts	36%	25%	28%	29%	19%
Regularly post their own content	16%	11%	15%	15%	8%
Rarely interact with the account	11%	29%	21%	16%	32%

Five Key *Insights*

01
The Redefinition of Success
Health, peace of mind, and debt freedom now outrank traditional status markers. Brands must speak to these values - not just aspiration.

02
The Generational Compact
Each generation carries a unique burden. Millennials are stressed; Gen Z is ambitious but blocked; Boomers are stable but frustrated. One-size-fits-all messaging will fail.

03
The Affordability Imperative
The cost of living is the dominant anxiety. Value, flexibility, and transparent pricing are no longer nice-to-have.

04
The Trust Paradox
South Africans use AI faster than they trust it. They're on WhatsApp constantly but locking down on social media with private accounts and engaging with content rather than creating it.

05
The Safety Foundation
Safety is the prerequisite for all other aspirations. Across every demographic, “living in a safe, crime-free community” is the number one life goal (72%), rising to 81% among Boomers.

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