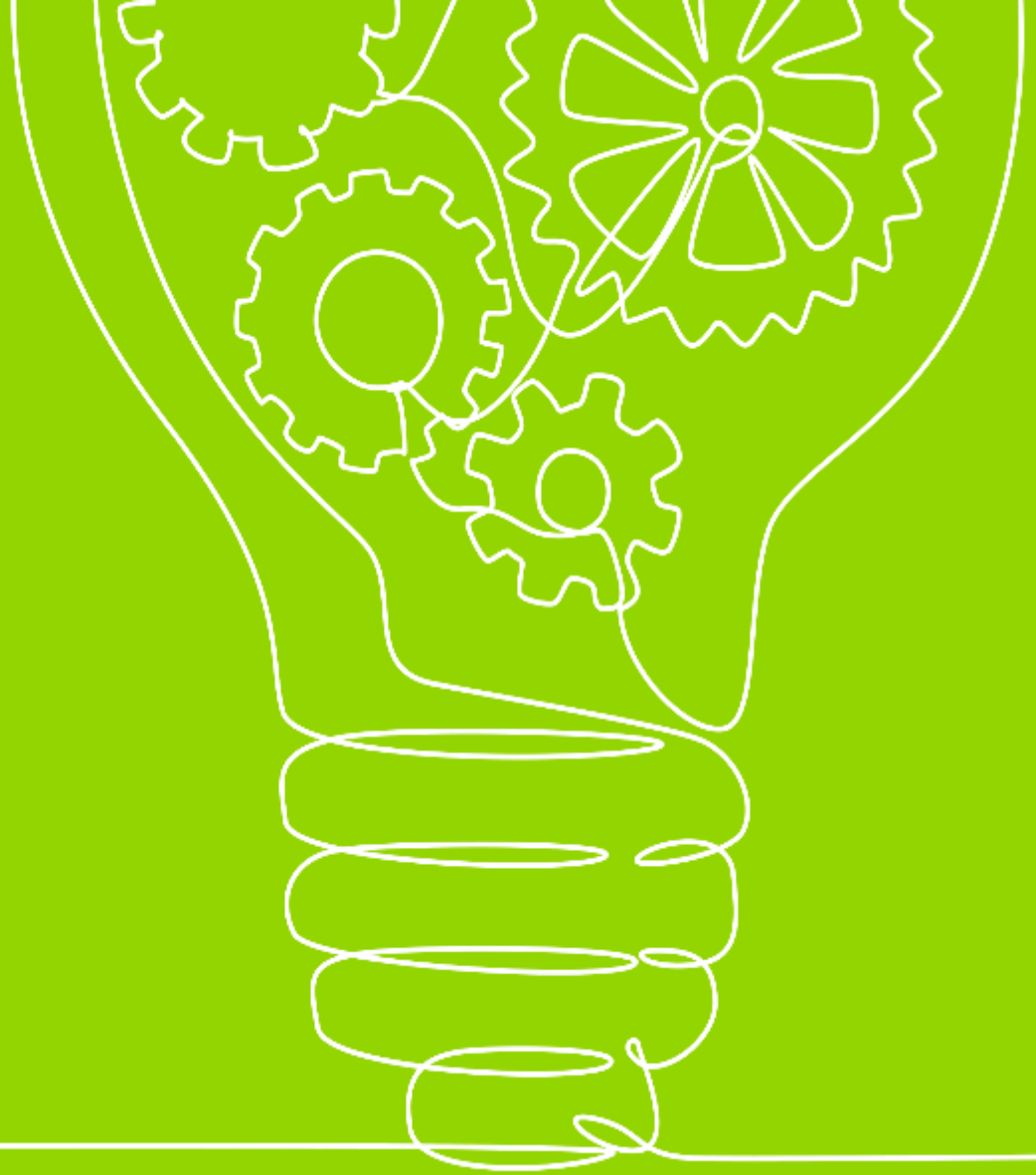
Digital Landscape 2027



Affinity collective

Digital and TTL Marketing Agency

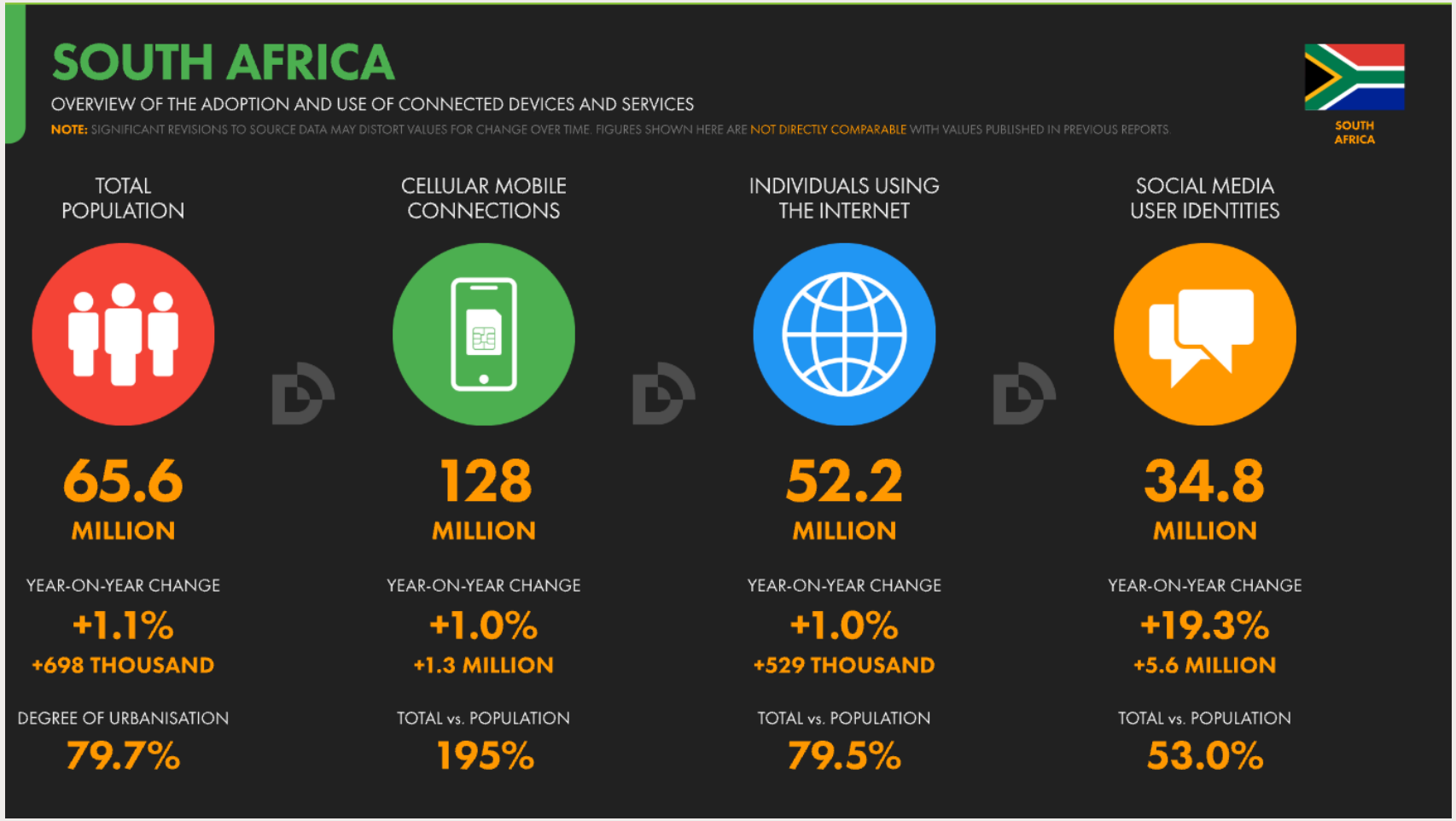
Digital Landscape



Affinity collective

Social identities surge as connectivity plateaus

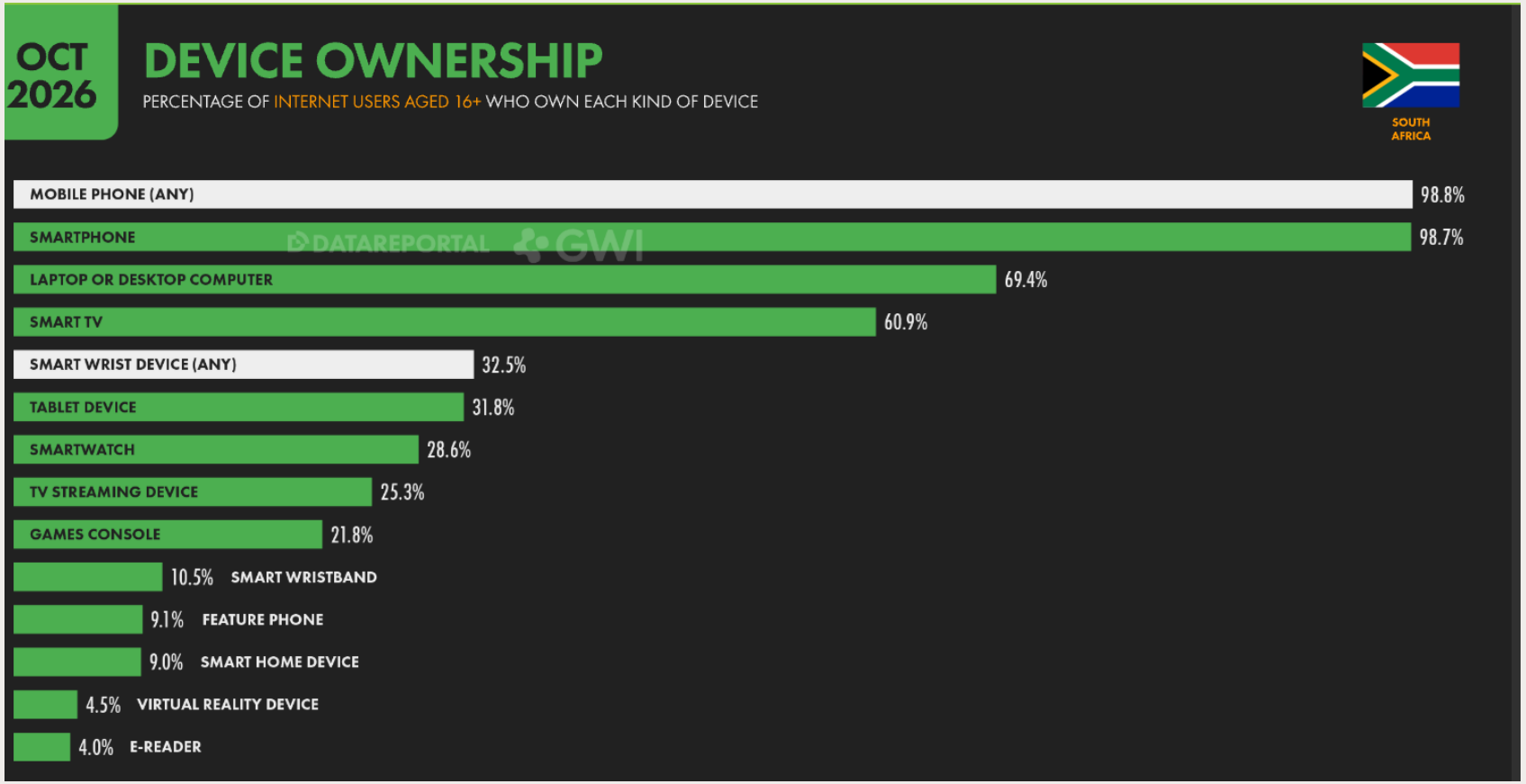
While population, mobile connections and internet access have plateaued, social media user identities jumped 19.3% (+5.6 million) to reach 34.8 million, proving digital growth is now driven by existing users multiplying their platform accounts.



Source: https://datareportal.com/reports/digital-2027-south-africa

Living life the “Smart” way

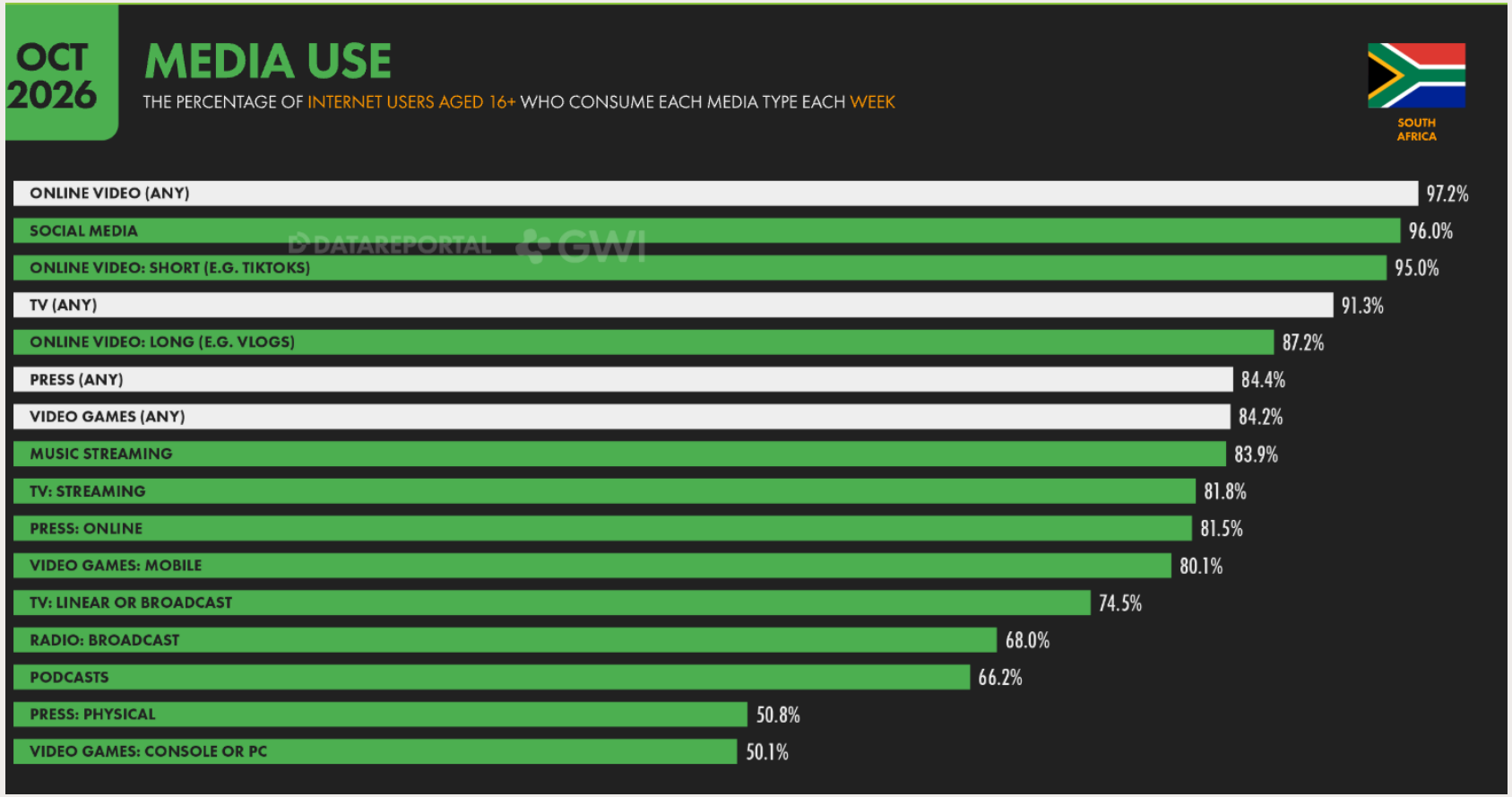
With 98.7% of online South Africans owning a smartphone, 60.9% owning a Smart TV, and 32.5% wearing smart wrist devices, consumers now live inside multi-screen connected ecosystems, driving a 28% + surge in monthly data usage across both MTN and Vodacom prepaid and postpaid users.



Source: https://datareportal.com/reports/digital-2027-south-africa

The streaming shift: Short-Form Video & Gaming outpace Linear TV

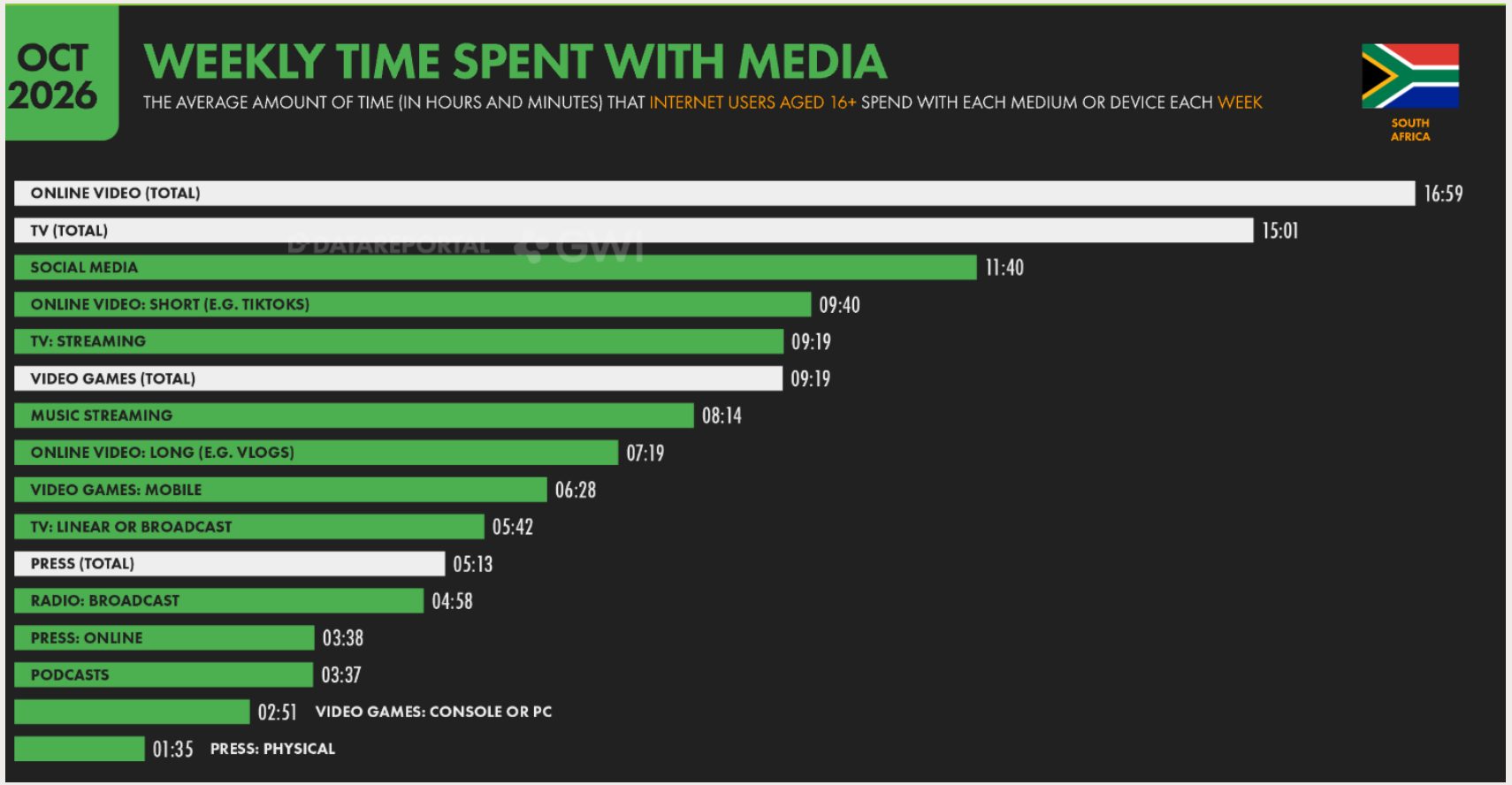
Online Video, led by short-form video at 95.0%, and Social Media now outrank total TV. Driven by Smart TV adoption and a young median population (28.9), Streaming TV has overtaken Linear Broadcast TV, while Video Games and Music Streaming command mainstream weekly reach.



Source: https://datareportal.com/reports/digital-2027-south-africa

Second-Screening & Streaming: Online Video leads weekly media time

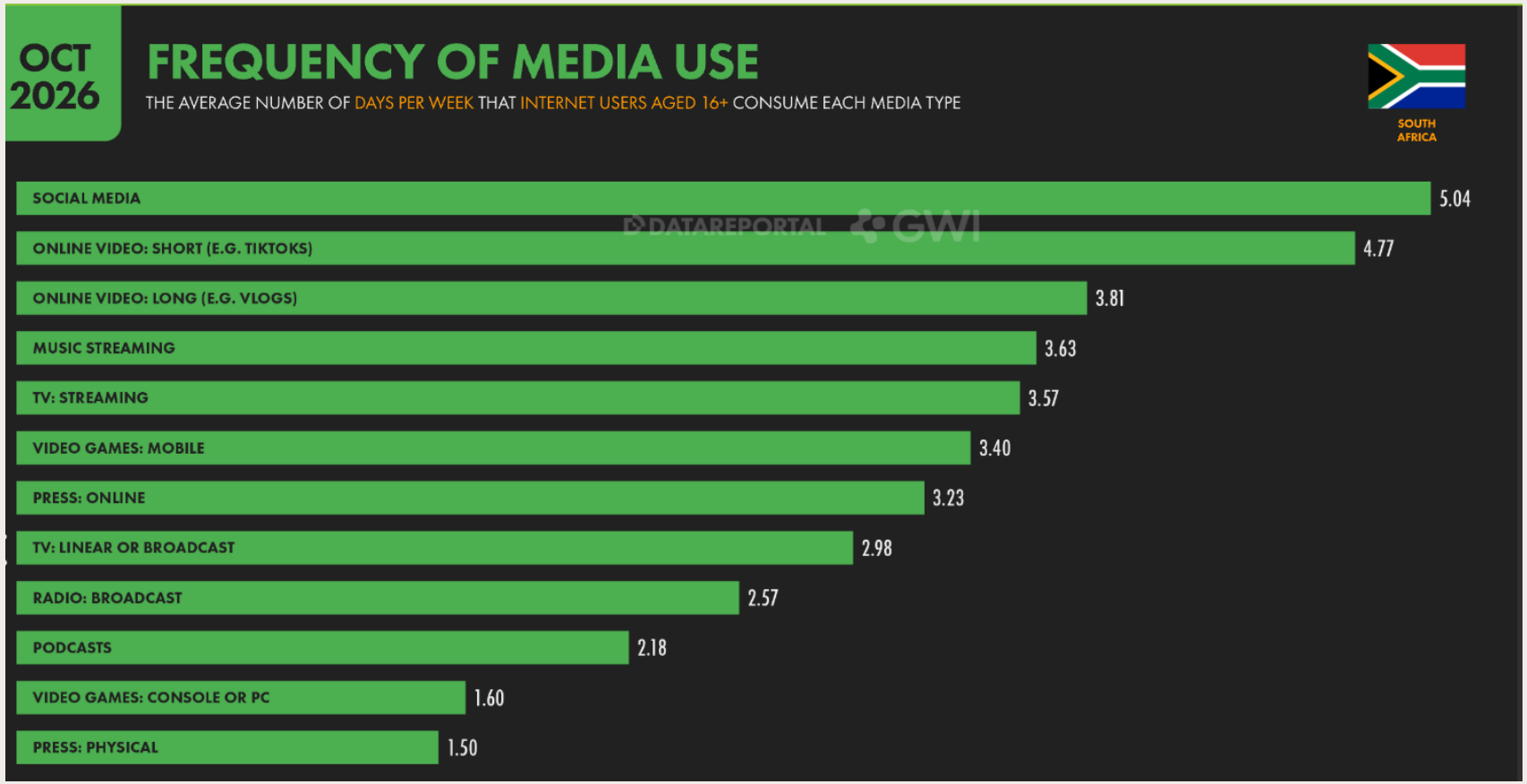
South Africans spend 16h 59m a week watching online video (led by 9h 40m on short-form platforms) and 11h 40m on social media, often second-screening simultaneously. Within total TV time (15h 01m), streaming (9h 19m) captures nearly double the hours of linear broadcast (5h 42m).



Source: https://datareportal.com/reports/digital-2027-south-africa

Habitual reach: Social Media leads daily media routines

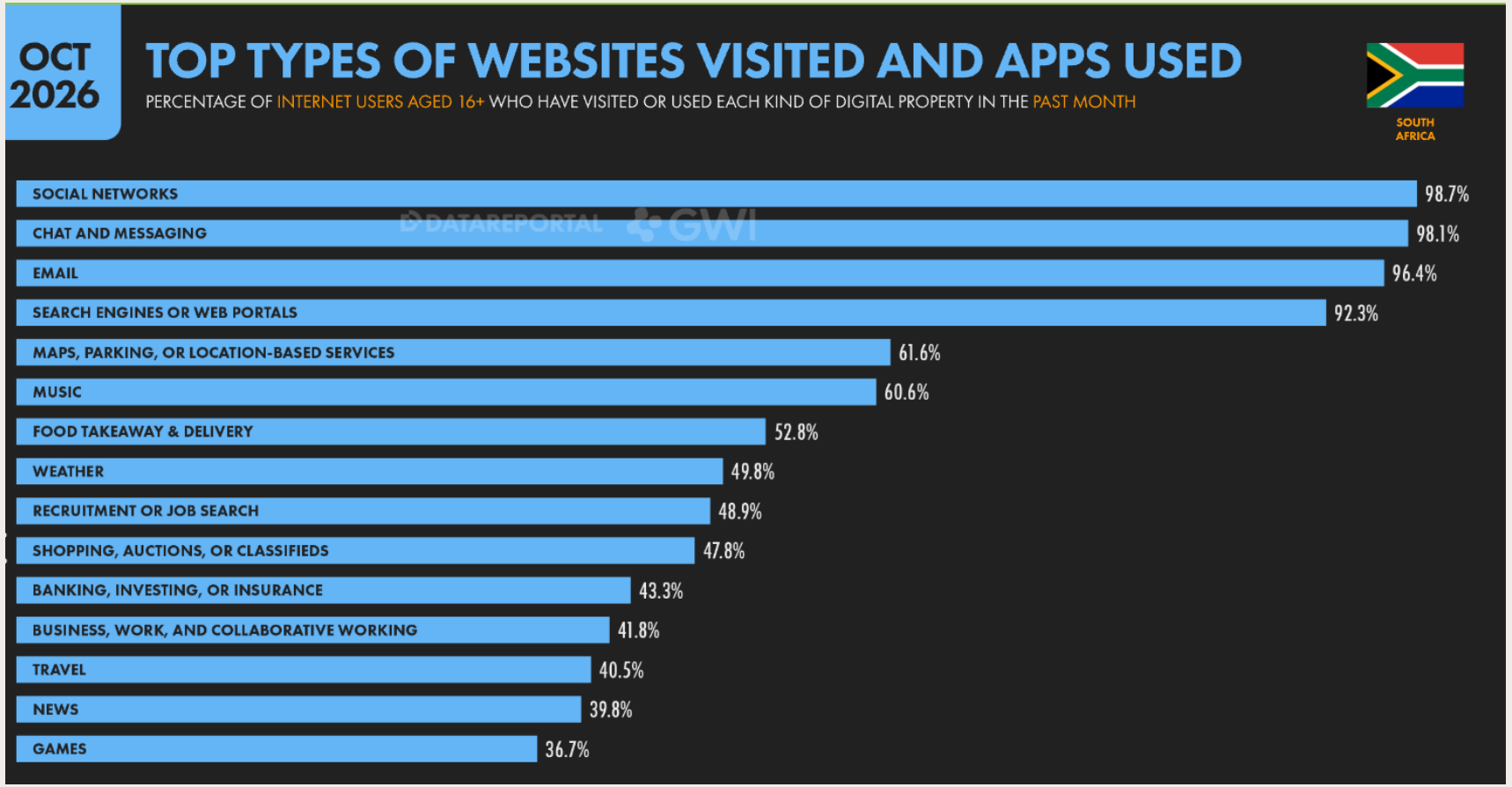
While ranking third in total hours, Social Media leads all media in frequency at 5.04 days per week, followed closely by Short-Form Online Video (4.77 days), making bite-sized social content the most reliable daily habit for reaching consumers compared to Linear TV (2.98 days) or Broadcast Radio (2.57 days).



Source: https://datareportal.com/reports/digital-2027-south-africa

Connection first: Social Networks & Chat Apps outrank search

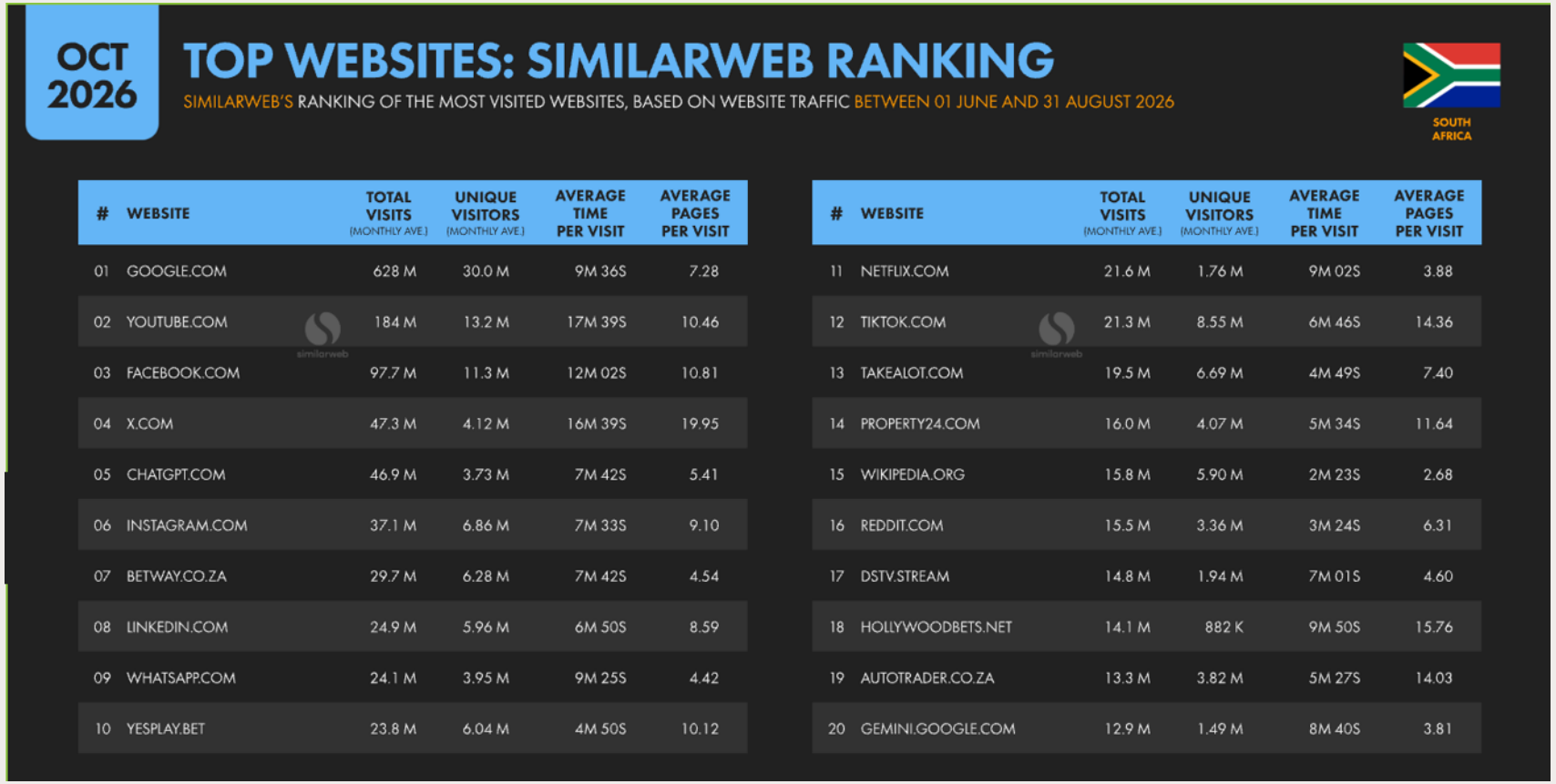
Rooted in South Africa's lifestyle culture, digital life is built around connection before utility, with Social Networks (98.7%) and Chat & Messaging apps (98.1%) serving as the modern digital gathering space and outranking more utilitarian Email and Search Engines.



Source: https://datareportal.com/reports/digital-2027-south-africa

Entertainment leads the web, and AI has joined the mainstream

Online video and social platforms dominate South Africa's top 10 websites. Right behind the social giants, ChatGPT ranks #5 (46.9M visits), underscoring how quickly AI has become a high-frequency daily habit.



OCT 2026

TOP WEBSITES: SIMILARWEB RANKING

SIMILARWEB'S RANKING OF THE MOST VISITED WEBSITES, BASED ON WEBSITE TRAFFIC BETWEEN 01 JUNE AND 31 AUGUST 2026

SOUTH AFRICA

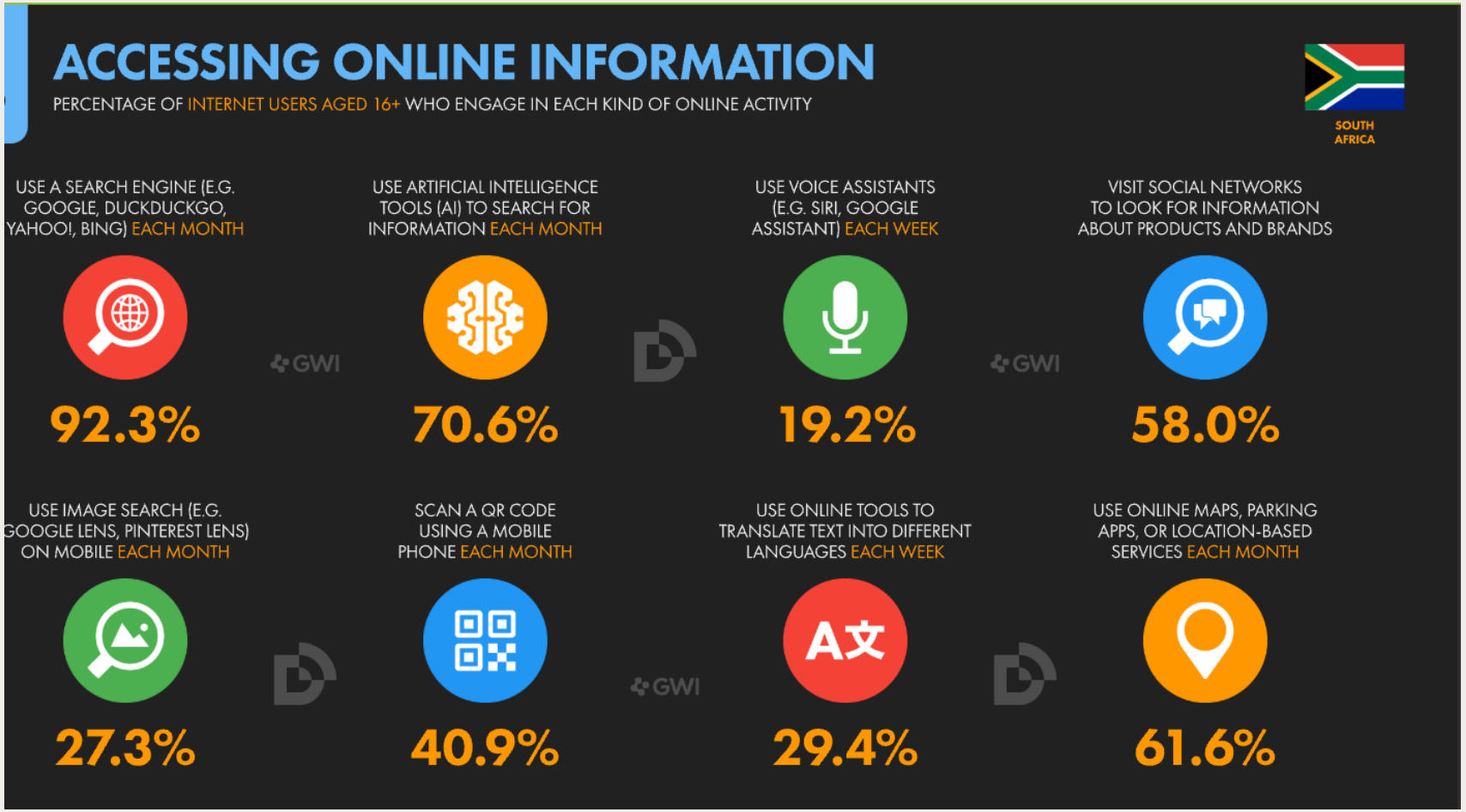
#	WEBSITE	TOTAL VISITS (MONTHLY AVE.)	UNIQUE VISITORS (MONTHLY AVE.)	AVERAGE TIME PER VISIT	AVERAGE PAGES PER VISIT
01	GOOGLE.COM	628 M	30.0 M	9M 36S	7.28
02	YOUTUBE.COM	184 M	13.2 M	17M 39S	10.46
03	FACEBOOK.COM	97.7 M	11.3 M	12M 02S	10.81
04	X.COM	47.3 M	4.12 M	16M 39S	19.95
05	CHATGPT.COM	46.9 M	3.73 M	7M 42S	5.41
06	INSTAGRAM.COM	37.1 M	6.86 M	7M 33S	9.10
07	BETWAY.CO.ZA	29.7 M	6.28 M	7M 42S	4.54
08	LINKEDIN.COM	24.9 M	5.96 M	6M 50S	8.59
09	WHATSAPP.COM	24.1 M	3.95 M	9M 25S	4.42
10	YESPLAY.BET	23.8 M	6.04 M	4M 50S	10.12

#	WEBSITE	TOTAL VISITS (MONTHLY AVE.)	UNIQUE VISITORS (MONTHLY AVE.)	AVERAGE TIME PER VISIT	AVERAGE PAGES PER VISIT
11	NETFLIX.COM	21.6 M	1.76 M	9M 02S	3.88
12	TIKTOK.COM	21.3 M	8.55 M	6M 46S	14.36
13	TAKEALOT.COM	19.5 M	6.69 M	4M 49S	7.40
14	PROPERTY24.COM	16.0 M	4.07 M	5M 34S	11.64
15	WIKIPEDIA.ORG	15.8 M	5.90 M	2M 23S	2.68
16	REDDIT.COM	15.5 M	3.36 M	3M 24S	6.31
17	DSTV.STREAM	14.8 M	1.94 M	7M 01S	4.60
18	HOLLYWOODBETS.NET	14.1 M	882 K	9M 50S	15.76
19	AUTOTRADER.CO.ZA	13.3 M	3.82 M	5M 27S	14.03
20	GEMINI.GOOGLE.COM	12.9 M	1.49 M	8M 40S	3.81

Source: https://datareportal.com/reports/digital-2027-south-africa

AI closes in on Search Engines as South Africa's go-to information hub

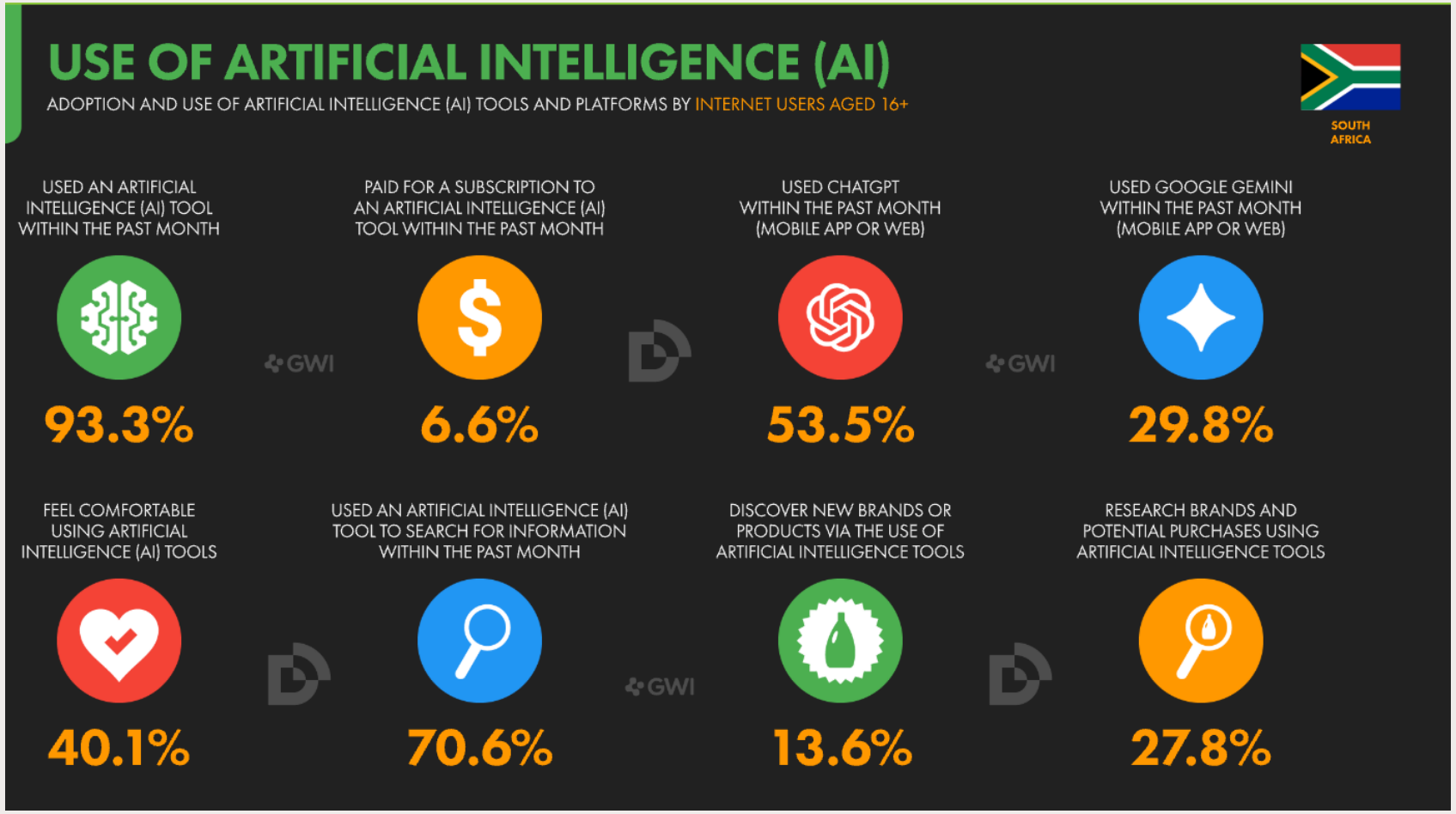
AI is rapidly closing the gap with traditional search, with 70.6% of South Africans now using AI tools to find information every month. At the same time, 58.0% turn directly to social networks to research products and brands.



Source: https://datareportal.com/reports/digital-2027-south-africa

AI Is now everyday utility, and a growing brand discovery channel

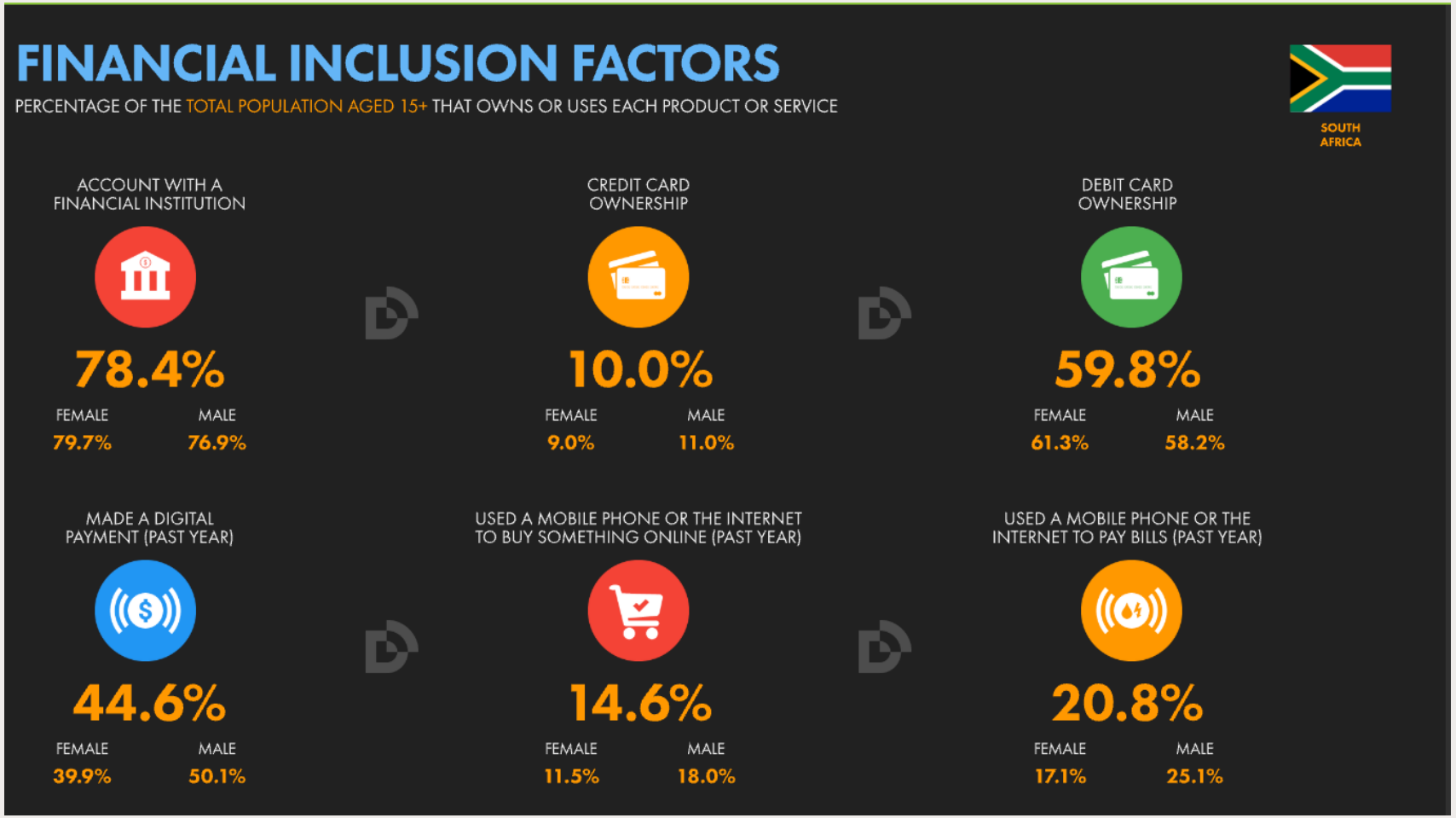
93.3% of South African internet users used AI in the past month, actively shaping brand decisions: 70.6% use it to search for information, 27.8% to research brands, and 13.6% to discover new ones.



Source: https://datareportal.com/reports/digital-2027-south-africa

E-Commerce hits 10% of Retail, driven by Non-Credit payment options

More South Africans shop online than own a credit card (10.0%), driving demand for debit cards and digital payments. E-commerce now accounts for 10% of total retail sales, up 22.5% YoY.



Source: https://datareportal.com/reports/digital-2027-south-africa

Convenience meets price sensitivity in weekly online shopping

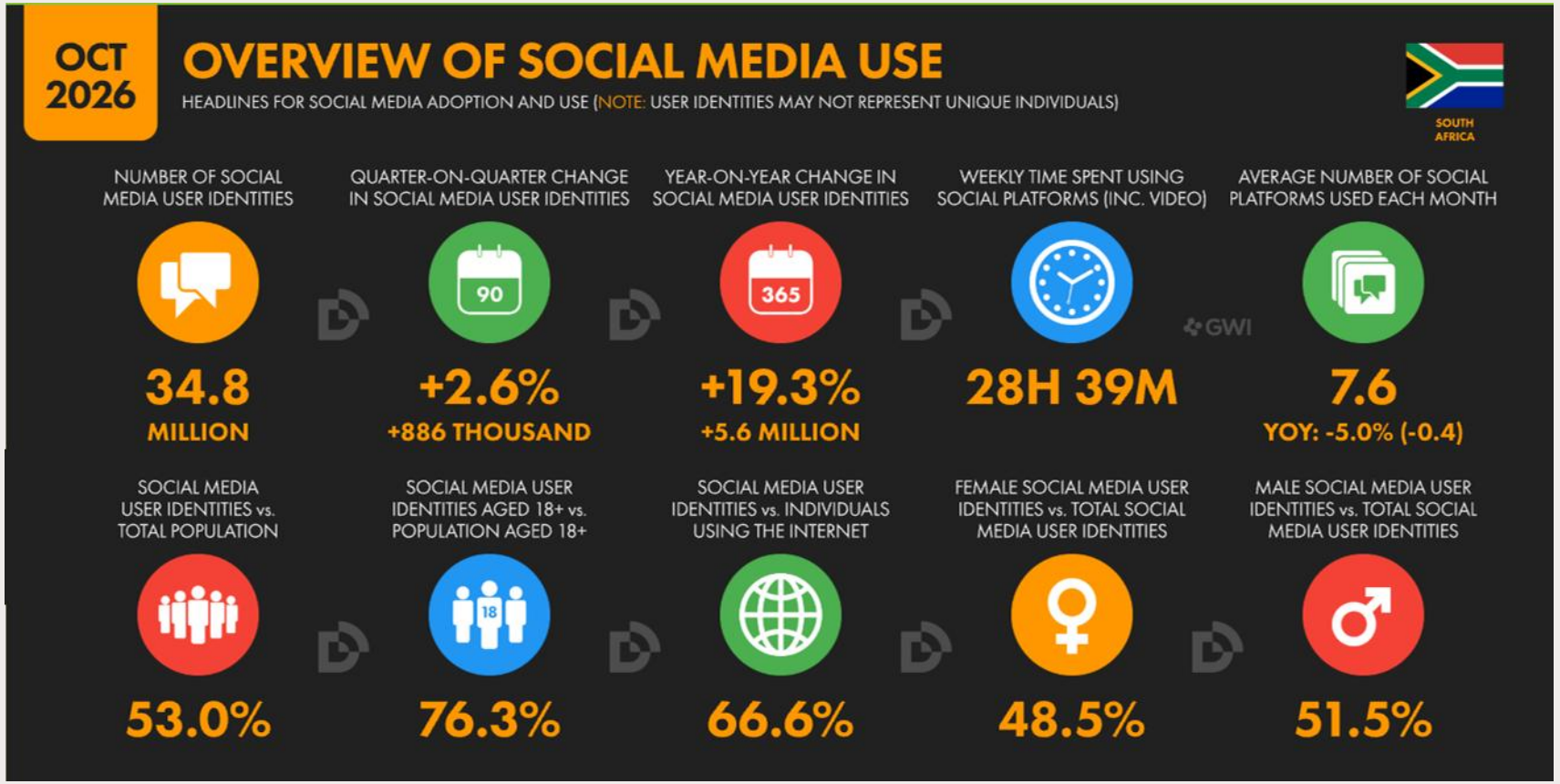
While 50.8% of South African internet users shop online weekly, value remains top of mind, with 19.7% comparing prices, 9.3% buying second-hand, and 6.5% using Buy Now, Pay Later.



Source: https://datareportal.com/reports/digital-2027-south-africa

Social Media’s massive reach in South Africa: 34.8 million user identities

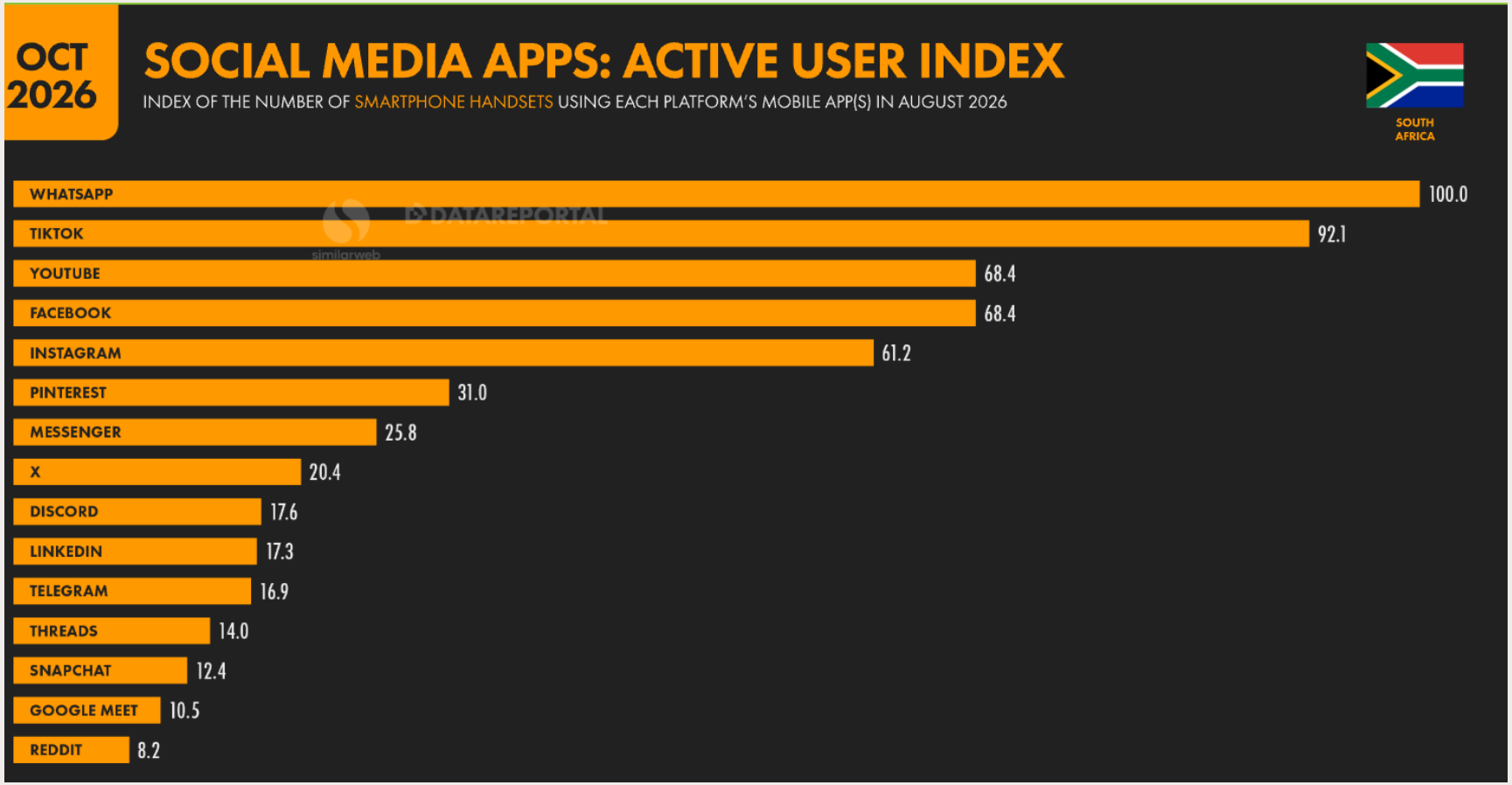
South Africa reached 34.8 million social media user identities (+19.3% YoY), spending 28h 39m per week. That’s over 4 hours daily, across an average of 7.6 platforms per month, making a multi-channel presence essential.



Source: https://datareportal.com/reports/digital-2027-south-africa

WhatsApp and TikTok lead the social app landscape

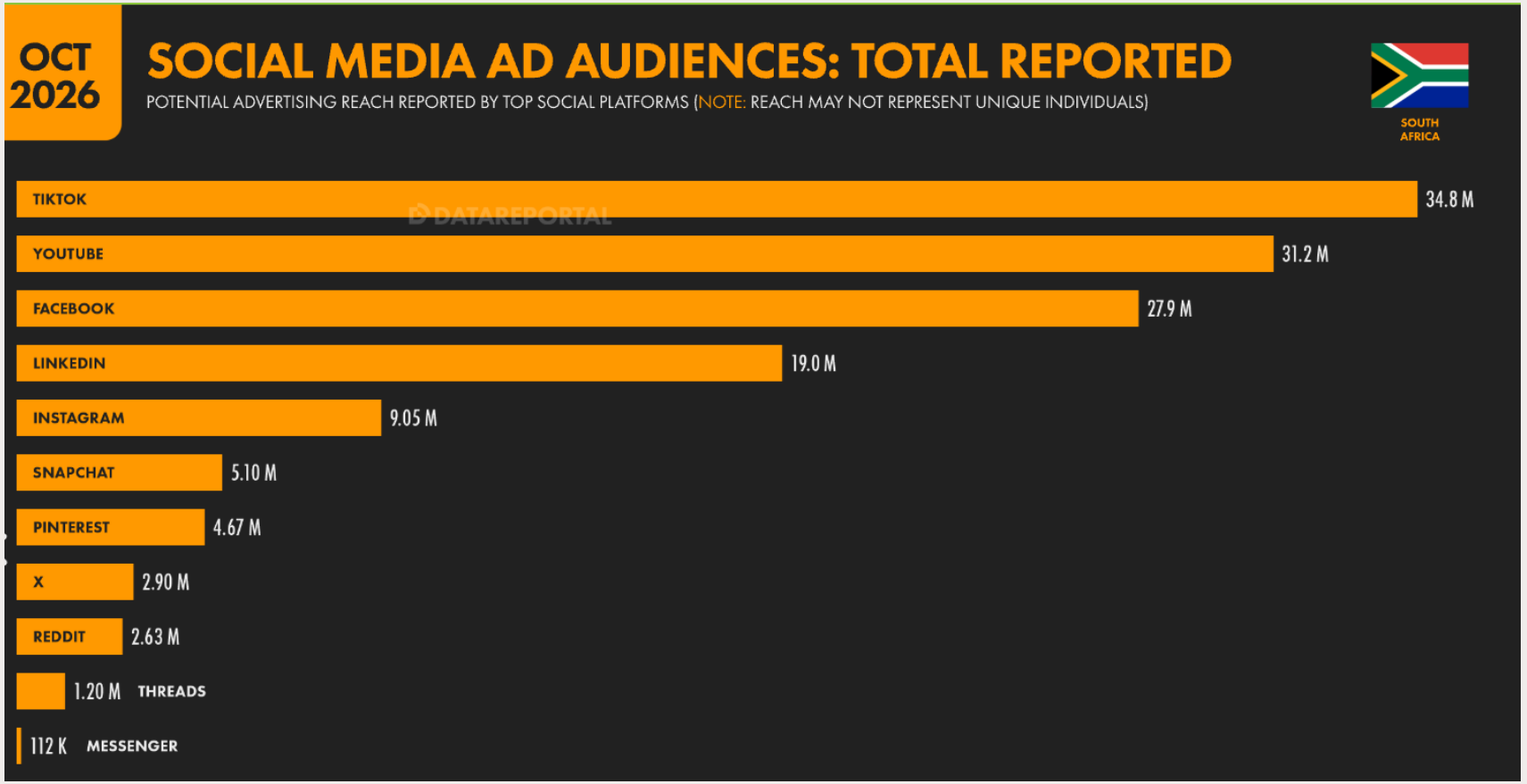
WhatsApp and TikTok top the mobile app index, followed by a dead heat between YouTube and Facebook and Instagram, proving that private messaging and video-centric feeds command the highest engagement.



Source: https://datareportal.com/reports/digital-2027-south-africa

Three platforms unlock mass ad scale in South Africa

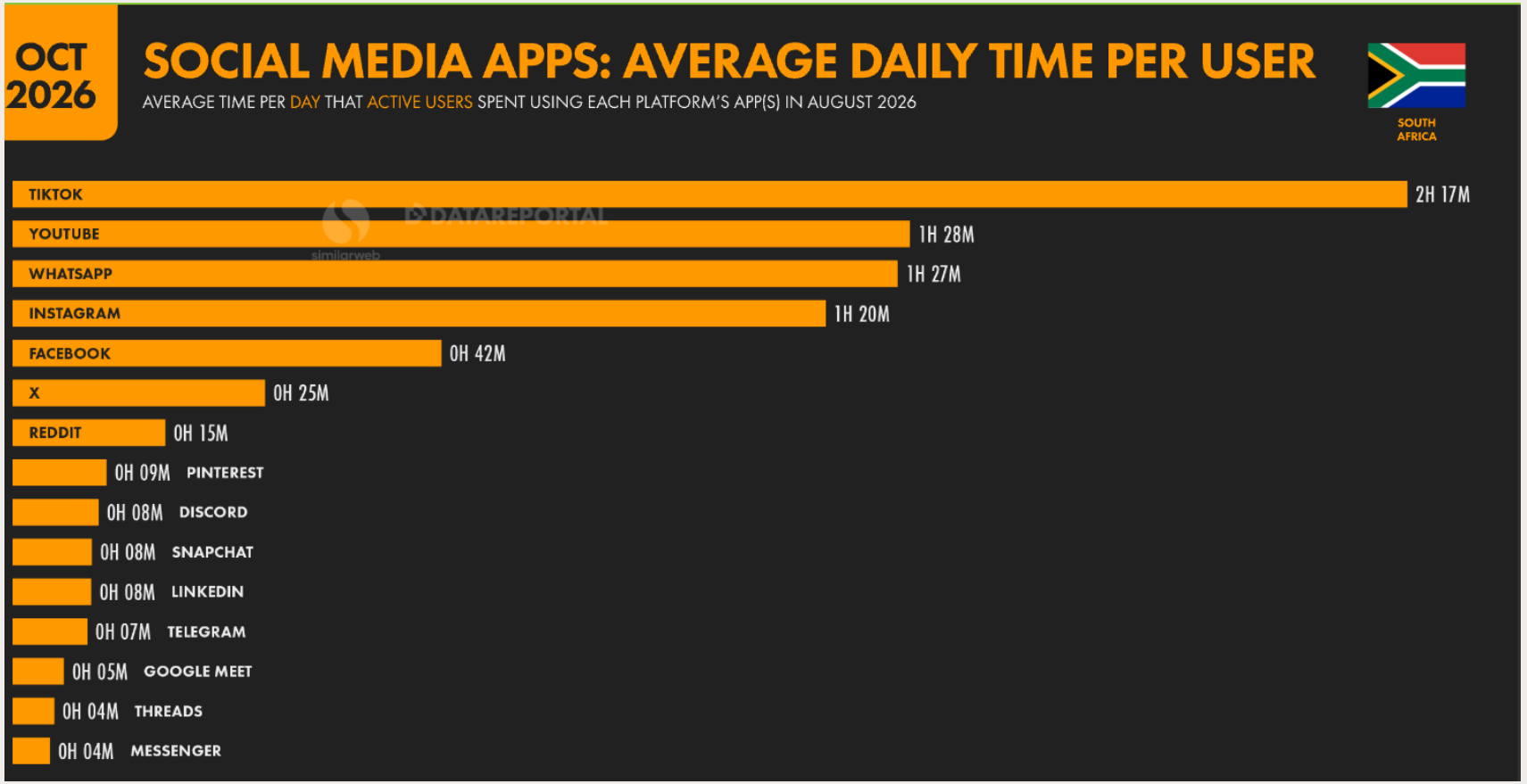
Video-first platforms dominate ad reach with TikTok (34.8M), YouTube (31.2M), and Facebook (27.9M) leading the pack.



Source: https://datareportal.com/reports/digital-2027-south-africa

TikTok commands 2h17m daily, leading South Africa's attention economy

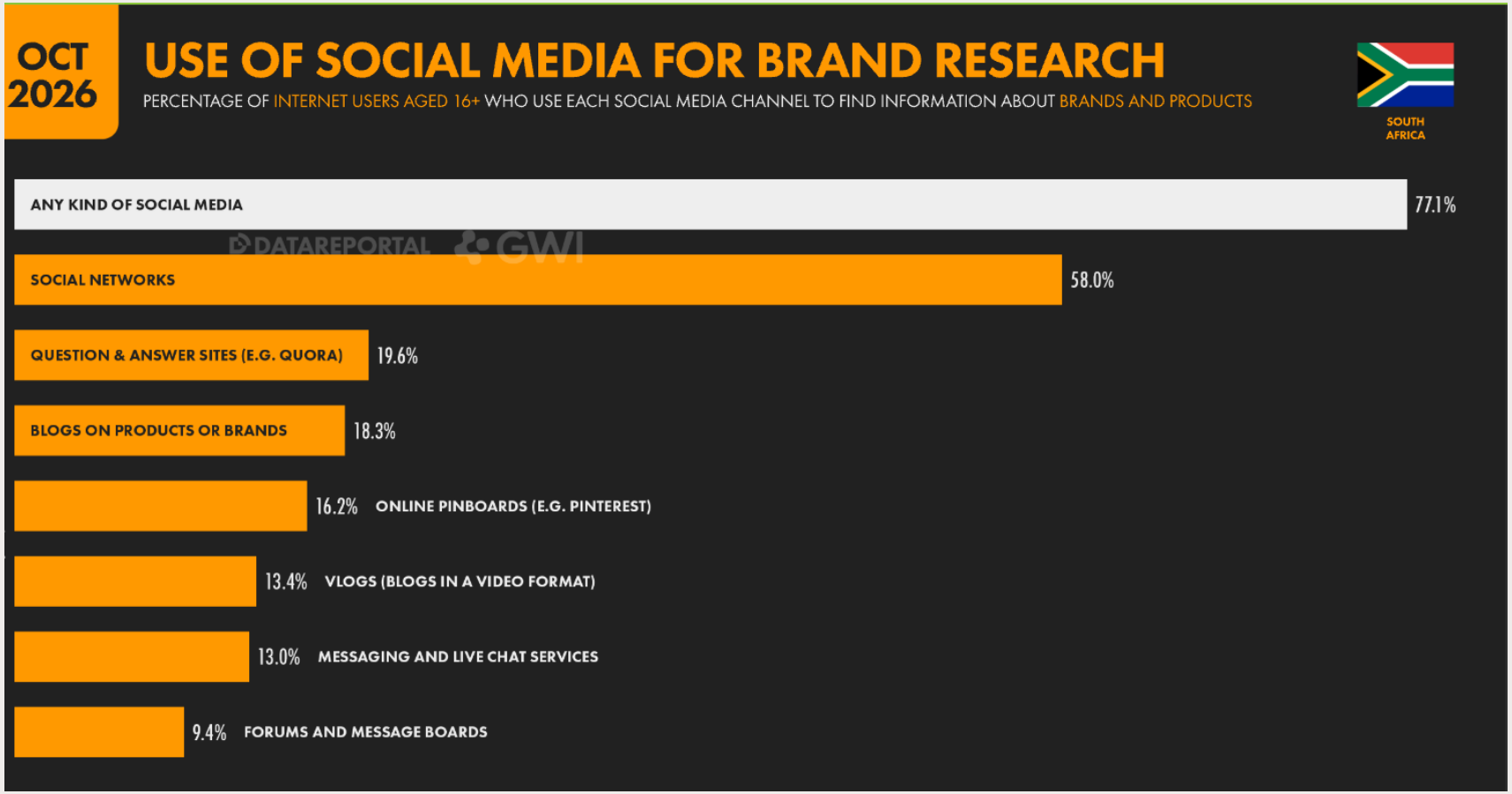
Active users spend nearly an hour longer on TikTok than YouTube, WhatsApp, and Instagram. Together, these four apps capture over an hour of daily user attention each, far outpacing Facebook.



Source: https://datareportal.com/reports/digital-2027-south-africa

Over 3 in 4 Internet Users use social channels to research brands

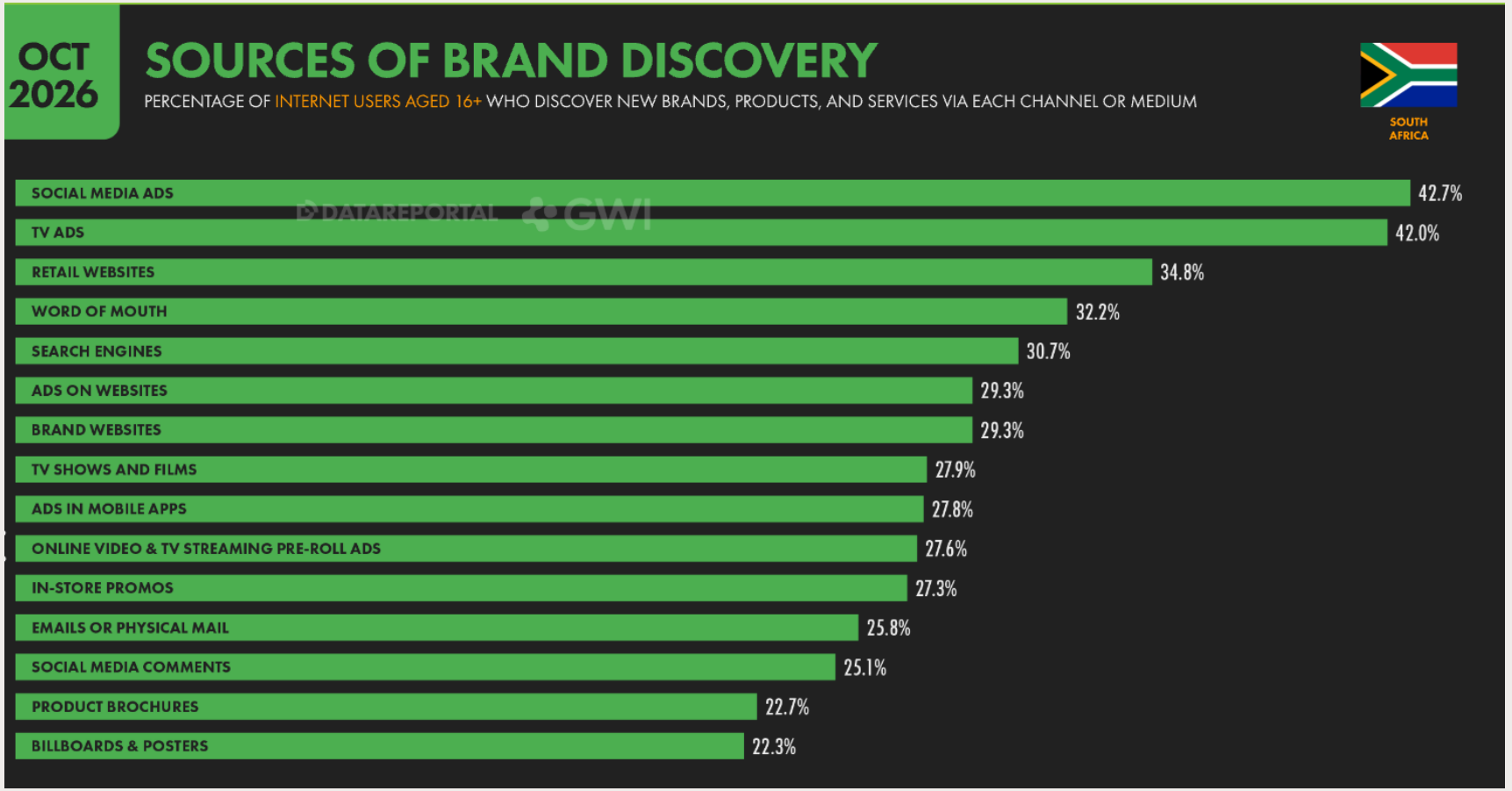
77.1% of South African internet users research brands via social networks, Q&A sites, blogs, and pinboards. To win consideration, brands need discoverable, review-rich content across both social feeds and forums.



Source: https://datareportal.com/reports/digital-2027-south-africa

Social Media Ads and TV Ads top brand discovery

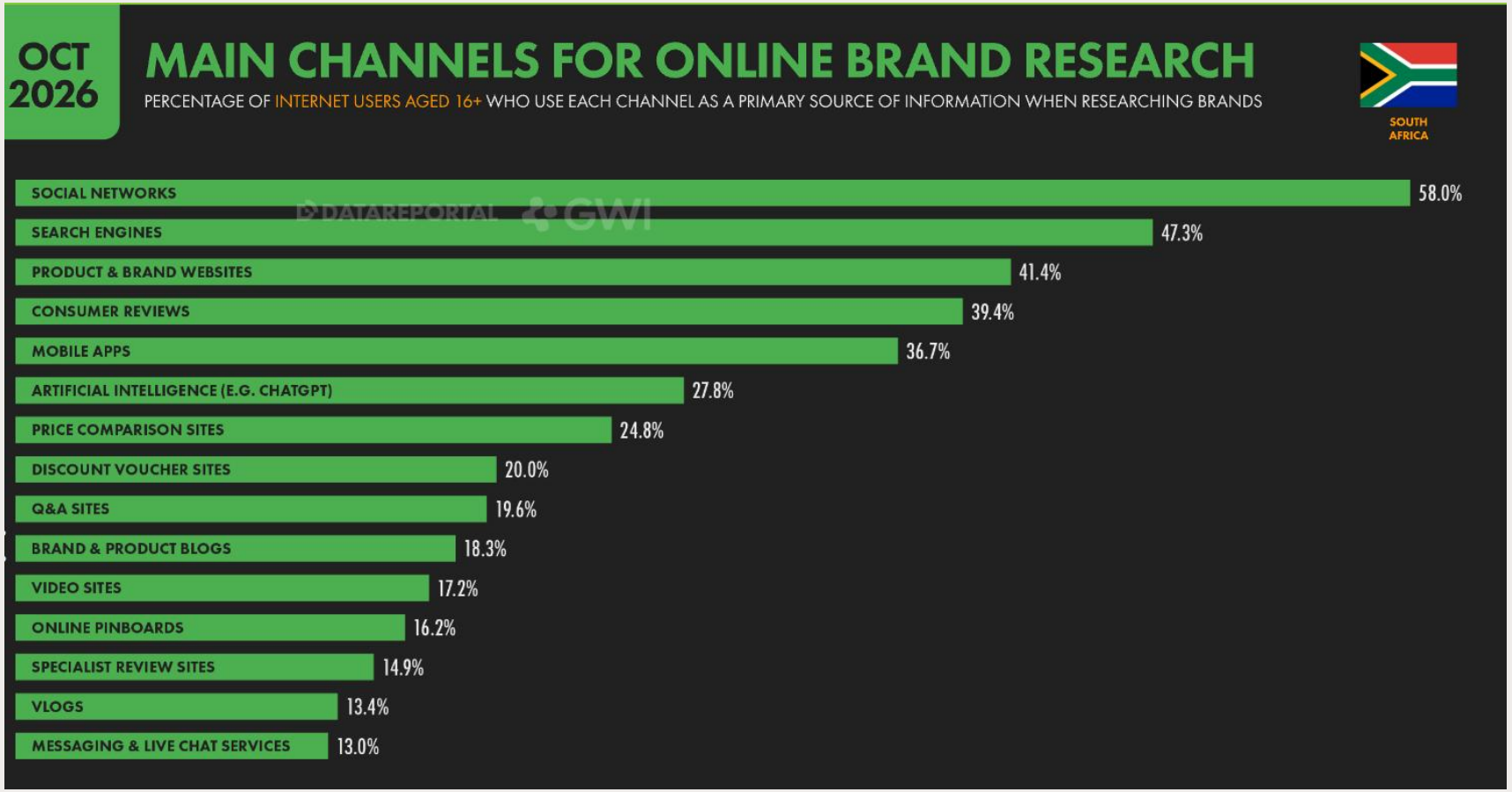
Social media ads and TV ads lead brand discovery, while retail sites, word of mouth and social comments drive validation, making it vital to link paid media with community engagement and retail presence.



Source: https://datareportal.com/reports/digital-2027-south-africa

Social Networks lead brand research ahead of Search Engines

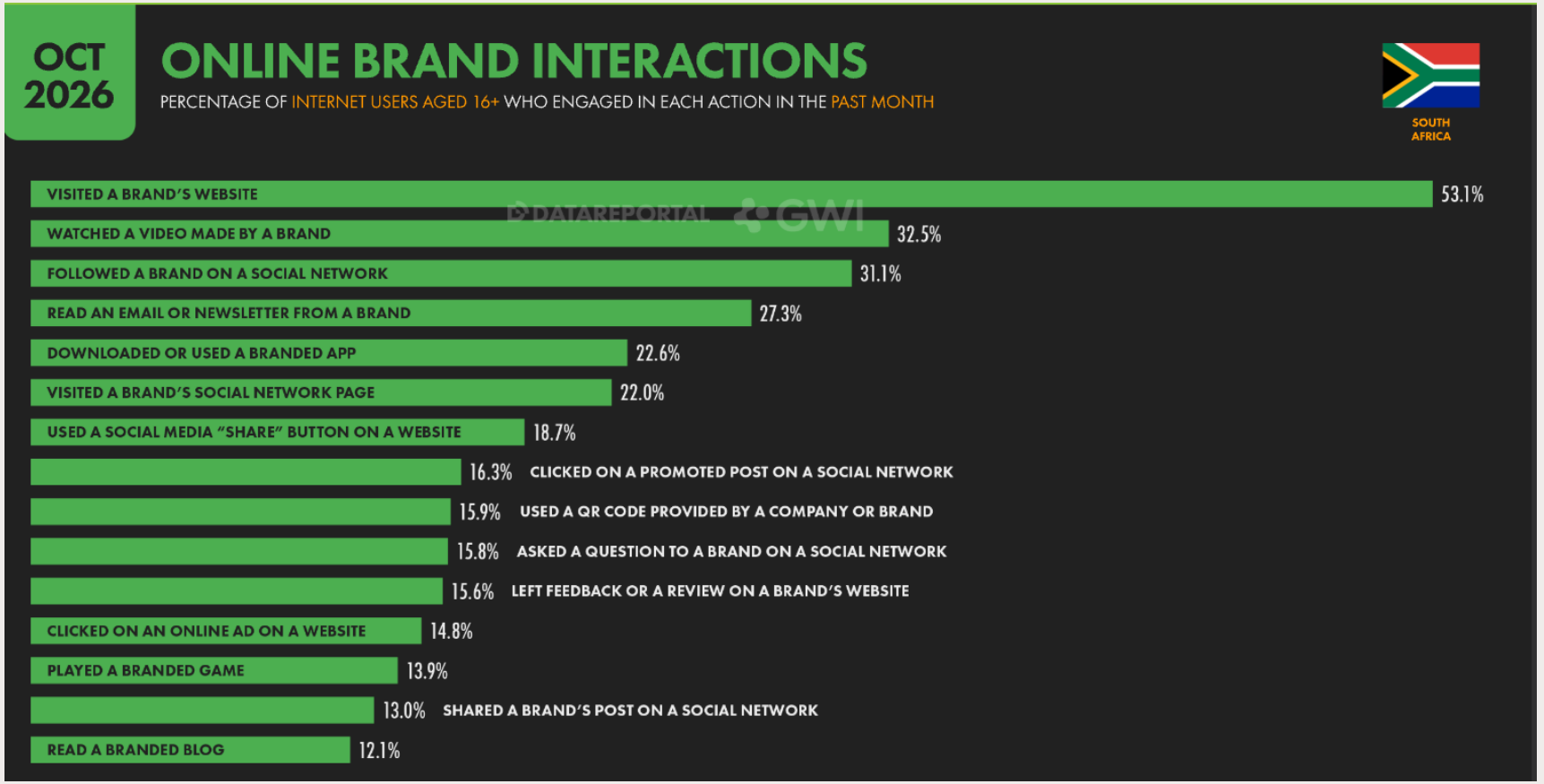
South Africans research brands via social networks (58.0%), search engines (47.3%), brand websites (41.4%), reviews (39.4%), and AI tools (27.8%.) Social search, reviews, and GEO are critical alongside SEO.



Source: https://datareportal.com/reports/digital-2027-south-africa

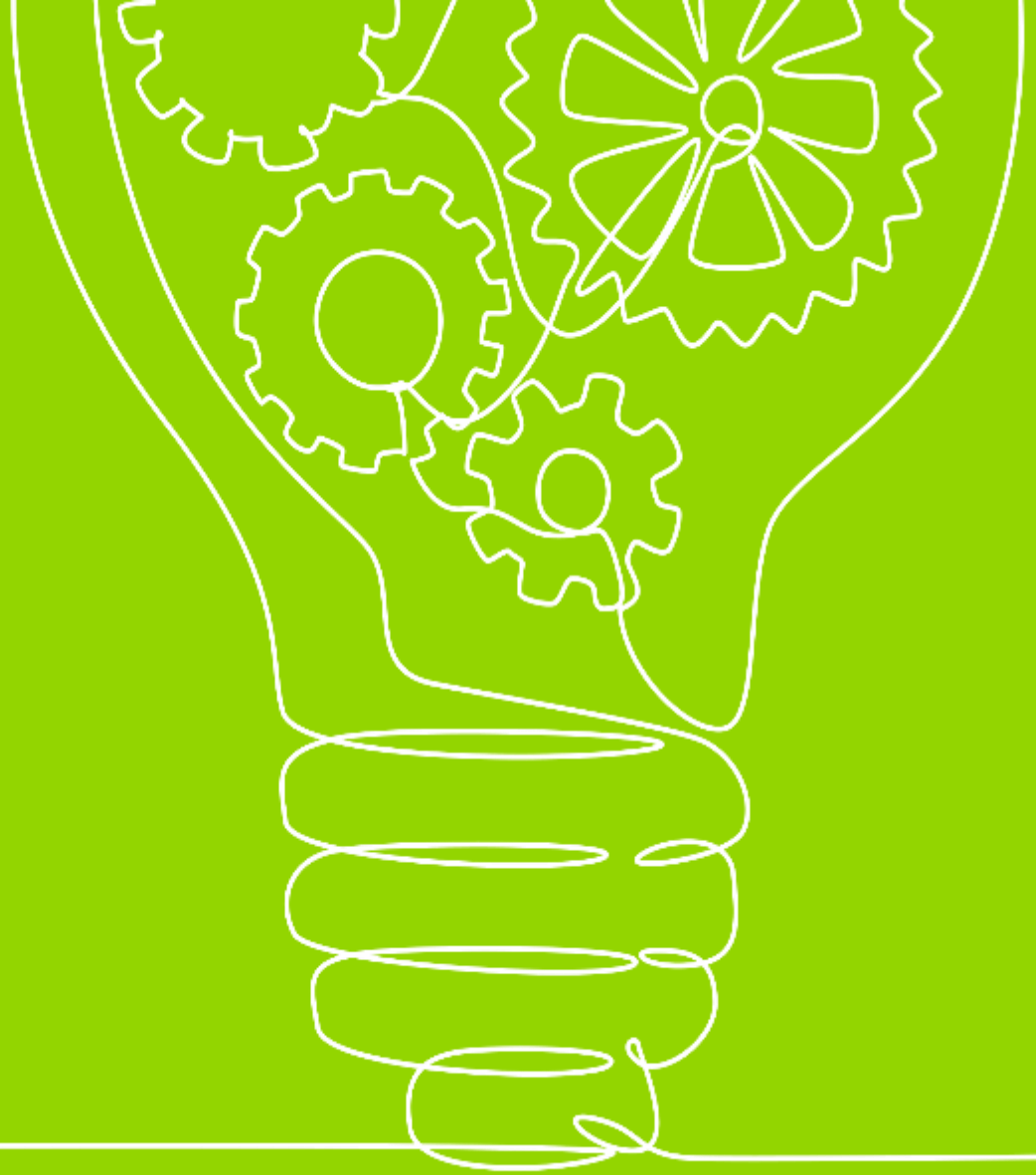
Websites, Video and Social Channels drive Brand Engagement

Monthly brand interactions are led by brand website visits (53.1%), branded videos (32.5%), social follows (31.1%), and emails/newsletters (27.3%). Brands win when owned channels and social content work together.



Source: https://datareportal.com/reports/digital-2027-south-africa

Trends



Affinity collective

10 Top Digital Marketing Trends in 2027

1. **Answer Engine Optimisation (AEO) & Zero-Click Conversion**
With AI summaries and social search answering queries before users click, website traffic is shrinking. Brands must publish structured, authoritative content to earn AI citations while optimising landing pages for high-intent, frictionless conversion.

2. **AI-Assisted Shopping (With a Peer Trust Filter)**
Shoppers use AI to compare prices and filter options but rely on human proof before buying. AI does the legwork; peer validation closes the sale.

3. **WhatsApp Conversational Commerce**
Dominating local mobile usage, the WhatsApp Business API outperforms email for service, catalogues, and re-engagement, provided messaging stays helpful, not spammy.

4. **Lo-Fi Video & Vernacular Micro-Creators**
Polished ads and celebrities are losing trust. Raw, smartphone-shot demos on TikTok, Reels, and Shorts, driven by relatable micro-influencers and local-language storytelling, command the highest reach and loyalty.

5. **Social Search Replaces Google**
Younger audiences turn to TikTok, Instagram, and YouTube first for product discovery and peer reviews, making in-app keyword, caption, and local hashtag optimisation essential.

6. **Retail Media Networks (RMNs) Surge**
Valued between R9B and R12B, major SA retailers (Checkers, Pick n Pay, Takealot, Clicks) are now prime ad platforms, letting brands target shoppers at checkout using first-party loyalty data.

7. **First-Party Data & Opt-Out Registry Readiness**
As third-party cookies die and SA's National Opt-Out Registry takes effect in May 2027, brands must replace rented databases with POPIA-compliant, value-driven first-party data engines.

8. **Data-Light & Payday-Aligned Performance**
Winning local campaigns pair fast-loading, data-light mobile experiences with ad spend weighted around mid-month and month-end payday cycles.

9. **Revenue Attribution Over Vanity Metrics**
Tight budgets demand full-funnel tracking that ties paid, organic, and offline retail lift directly to CAC and ROAS, not likes or reach.

10. **Deepfake Defence & Brand Verification**
As low-cost voice clones and deepfakes threaten brand trust, companies need cryptographic verification protocols, real-time crisis response, and team training to spot synthetic threats.

12 Top Consumer Purchase Behaviour Trends in 2027

1. **Intentional Underconsumption Rules**
   Impulse buying is dead in a contracted economy. Every purchase is deliberate, calculated, and strictly justified.

2. **Private Labels Become the Default**
   Store brands are no longer a budget compromise. Shoppers across formal retail and township markets are actively abandoning legacy labels for private-label alternatives offering identical quality at lower prices.

3. **"Micro-Finance" & Embedded BNPL Checkout**
   Traditional credit cards are giving way to interest-free Buy Now, Pay Later (BNPL) tools (like PayJustNow and Payflex) and mobile wallet lay-bys, allowing cash-strapped shoppers to split even everyday grocery, pharmacy, and clothing baskets into manageable payday instalments.

4. **Hyper-Local, Top-Up Convenience (Q-Commerce)**
   Shoppers are avoiding budget-busting monthly shops in favour of smaller, frequent top-ups via rapid delivery apps (like Sixty60) and digitised spaza ecosystems.

5. **Loyalty & Promo-Gated Purchasing**
   Brand loyalty is purely conditional. Nearly 60% of South Africans let rewards dictate where they shop, and half delay purchases until promotions or bulk deals unlock the price.

6. **Death of the Lipstick Effect**
   Instead of splurging on small luxuries to offset big sacrifices, cash-strapped consumers are trading down to "good enough" everyday alternatives (choosing Cadbury over Lindt).

7. **AI Filters, Peers Validate**
   Consumers use AI to compare prices and shortlist options, but rely on closed WhatsApp groups, local forums, and word-of-mouth (not ads or mega-influencers) to verify quality before buying.

8. **Gen Alpha Enters the Market**
   The largest generation in history is coming of age, with the oldest turning 16 in 2026. This generation is reshaping household purchasing influence and brand discovery.

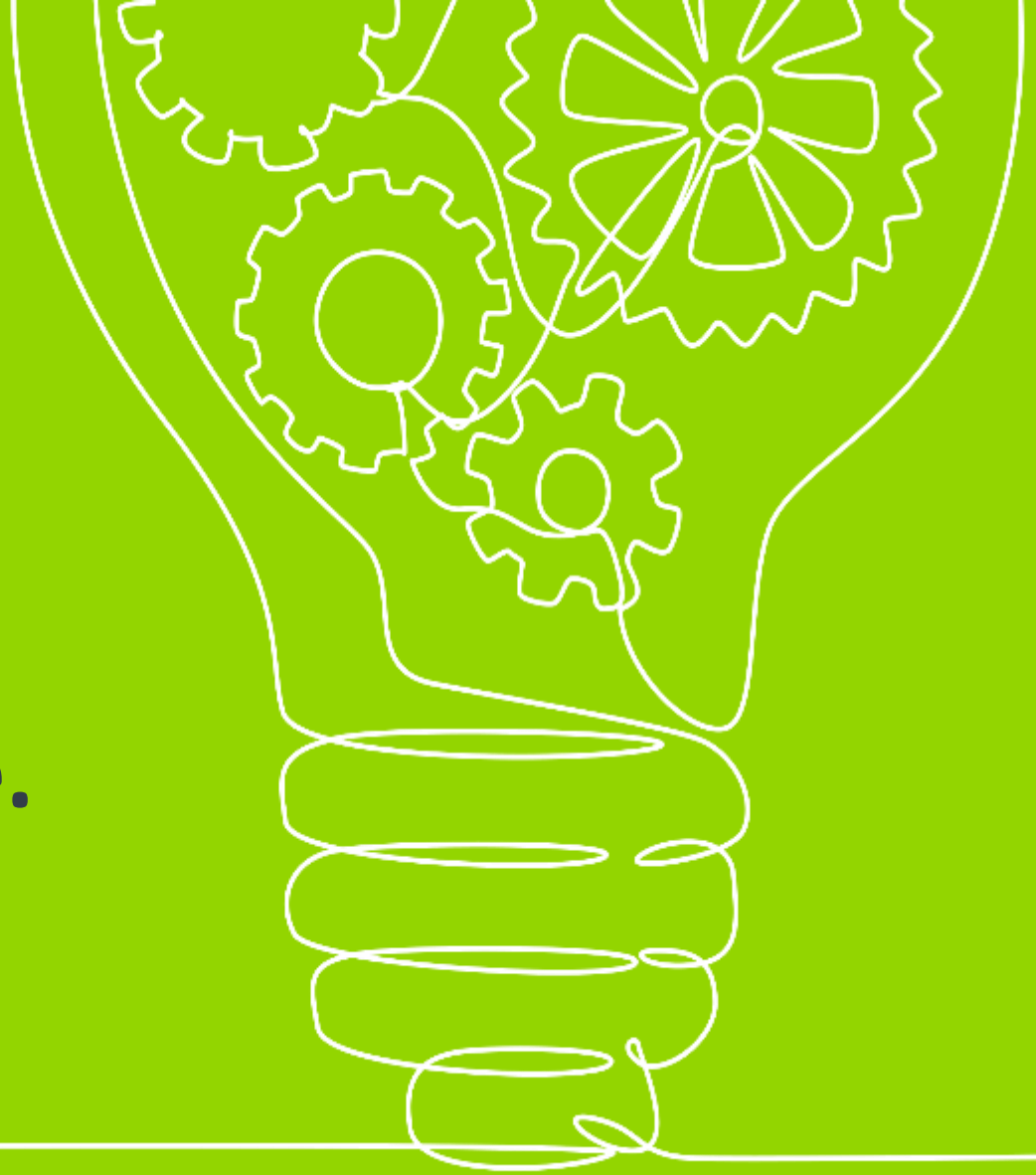
9. **The "Illusion of Affluence" Squeeze**
   With top earners (R50k+/month) carrying a 300% debt-to-income ratio and spending 97% of net pay on repayments, local aspirational spending is shrinking. High earners are trading down on staples to fund selective treats, leaving luxury reliant on inbound tourists and the ultra-rich.

10. **The Hollowed Middle & "Zero-Fat" Kasinomics**
    Mid-tier brands are losing share from both ends across suburban and township markets. With over 70% of consumers financially anxious, shoppers refuse to gamble—choosing either lowest-cost utility or proven, high-trust staples.

11. **Circular & Repair-First Buying**
    High replacement costs are driving a boom in second-hand marketplaces and local repairs, with durability and resale value now dictating upfront purchases.

12. **Preventative Health as Financial Protection**
    Discretionary wellness spending is shifting from luxury self-care to practical preventative healthcare, supplements, and pharmacy retail to avoid costly medical bills and lost income.

Hello, we are Affinity Collective.



Affinity collective

Digital and TTL
Marketing Agency



WELCOME TO THE COLLECTIVE

Beyond ordinary. Unleash your originality with Affinity Collective.

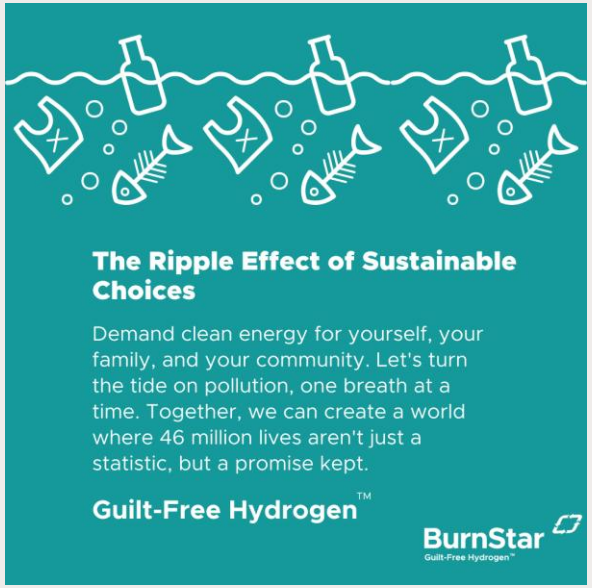
Your side-to-side Digital and TTL Marketing service partner that uses analytics to inspire creativity.

Affinity collective

BEYOND ORDINARY

In 2026, our focus on strategy and analytics paid off with **60.3 M Social Media Impressions**, a 22% increase in Interactions, an Interaction Rate of 9.66%, a 16% increase in Followers, and an average **CTR of 3.36%,** driven by authentic, engaging community management. We responded to **78.76k incoming messages,** mentions, and Comments.









Source: Brandwatch

OUR COLLECTIVE

Led by Marketers. Driven by ROI.

We've sat in your chair. As former corporate brand leaders and agency specialists, we turn data-driven strategy into real business results. We don't just generate insights, we operationalise them. Partnering seamlessly with your media houses and agency network, we track the full customer journey from R1 spend to proven ROI.



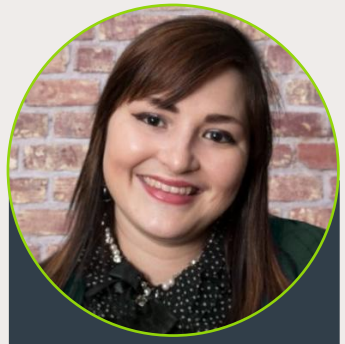
Tongase Dhlakama
Client Services Director & Brand Architect

20+ Years FMCG Marketing Strategy and Management, 4 Years in Agency



Steve Clayton
Creative Director

20+ Years Art Copy & Concept Agency Leadership



Olga Queen
Communications Director

PR, Crisis Communications & Online Community Expertise, ex-team lead on WesBank at Meropa



Debbie Shepard
Strategy Director, CEO

Marketing & Digital Senior Strategist, +20 Years of Marketing & Brand Strategy and Management

OUR PURPOSE

Driven by Growth. Powered by Purpose.

Affinity Collective's purpose is to uplift the lives of youth by giving them the tools to build future careers. By partnering with companies and brands on their growth journeys, we cultivate a collaborative and inspiring ecosystem to help everyone reach their full potential.

Because we're 51% owned by non-profit Affinity Growth Collective, every business partnership directly funds continuing education to positively impact inclusivity and accessibility for future generations.

B-BBEE LEVEL 2 CONTRIBUTOR



AN INCUBATOR

We hire graduates with little or no experience, upskill them, and then grow them to be part of our collective or support their journey into the future.



BUILDING YOUTH

Our webinars, workshops and skills programmes are designed to upskill youth with practical skills in marketing. We sponsor on average 4 free spaces in each course to uplift youth without funds.





Contact:

Debbie Shepard

082 440 0754

debbies@affinitycollective.co.za

www.affinitycollective.co.za

Affinity collective