

2025 Fast Food and QSR Insights

SEARCH, CHATTER AND MASS MARKET CONSUMER BEHAVIOUR

Rogerwilco

 **MoyaApp**

 **YOUKNOW**
TECHNOLOGIES

Index

INTRODUCTION	03	COMBOS AND CONTRASTS	36
CONTRIBUTORS	09	CONCLUSION	52
SHARE OF SEARCH	11	ABOUT US	56
SENTIMENT	22	Rogerwilco YOUKNOW Technologies Moya App	



Introduction

UNDERSTANDING THE SIGNALS BEHIND SOUTH AFRICA'S FAST-FOOD CHOICES

South Africa's fast food and QSR industry is shifting quietly but significantly. Behind the sales figures and punchy promotions lie stronger indicators of how people make food choices. This report explores three of them: what people search for, how they talk about brands online and what the mass market buys. Together, these signals reveal which brands are gaining attention, trust and wallet share, and which are falling behind.

We analysed the most visible and talked-about QSR and fast-food brands in the country, including KFC, McDonald's, Chicken Licken, Nando's, Roman's Pizza, Debonairs, Steers and others. These are primarily quick-service operations that offer takeaway and fast delivery. Their focus on speed and convenience makes them central to the definition of fast food.

By contrast, this report excludes sit-down, full-service family restaurants such as Spur, Wimpy, Ocean Basket and Mugg & Bean. While they remain popular, these brands operate with different consumer dynamics, longer dwell times and a service-first model. The focus here is on QSR and fast-food brands that compete on speed, affordability and digital convenience.



Share of Search as a Signal of Intent

Using Rogerwilco's award-winning WOLF tool, this report tracks SoS, a measure of how often consumers search for a brand relative to competitors. It's a reliable indicator of consumer purchase intent and a strong predictor of future market share.

Between May 2024 and April 2025, McDonald's and KFC led SoS rankings with just under 11% each. The largest portion, more than 35%, went to "Everyone Else," a mix of unoptimised brands, delivery apps and smaller players. This suggests that while the majors remain strong, consumers are actively exploring alternatives.



Digital Sentiment and the Online Mood

Brandwatch data via YOUKNOW Technologies shows a 32% drop in fast food-related online mentions year-on-year. People are still eating out or ordering in, but they're less likely to talk about it unless something stands out.

Positive mentions follow smart campaigns, fast service or strong value. Negative sentiment links to late deliveries, poor service or disappointment with portion size. In a cost-conscious market, one bad experience can shift loyalty if a competitor is more reliable.

Mass Market Buying Habits

MoyaResearch surveyed over 3,500 South Africans earning up to R9,999 per household via MoyaApp. The data offers a clear picture of what the mass market wants and buys most.

KFC is the most purchased brand, followed by Chicken Licken, McDonald's and Roman's Pizza. The top drivers are flavour, affordability and convenience.

Local options like kota and shisanyama remain firm favourites, offering better portions and value. For this market, price, flavour and consistency matter more than brand image.

Bringing It Together

Each chapter focuses on one of these three pillars:

**Share of
Search**



Sentiment



**Buying
Behaviour**





The overlap is what matters. A brand may perform well in one area and poorly in another. Understanding the full picture helps marketers act with greater precision.

Whether you're an established name or a challenger looking to grow, the insights here show where attention is going, how it's earned and how quickly it can shift.

Contributors

MONGEZI MTATI

Senior Brand Strategist, Rogerwilco

With over twelve years of experience in digital brand-building, Mongezi Mtati leads the production of Rogerwilco's annual Township CX Report and the Industry Vertical Reports. He has been instrumental in brand thinking across the digital landscape for leading brands such as Standard Bank, Brand South Africa, Babcock, Nestlé and many others. He obsesses over the intersection between human insight and data when thinking through strategy. You may find him podcasting, speaking at conferences or trying his hand at travel and wildlife photography.





SHANA ABRAHAMS

Head of Research, MoyaApp

Shana is the Head of Research at MoyaApp, a data-free super app connecting millions of South Africans daily. With over a decade of experience in market research and consumer insights, Shana specialises in designing commercially impactful research strategies that drive growth and unlock the voice of the mass market. Her expertise spans brand equity, behavioural analysis, and mobile panel management, with a strong focus on utilising accessible digital platforms to engage underserved consumers and translate data into actionable business insights.

SHAUN PEARSON

Product Owner: Social Tech & Consumer Insights Specialist, YOUKNOW

Shaun Pearson is the Lead for Social Tech at YOUKNOW Technologies and our local Brandwatch expert. With a decade of professional industry experience in Digital Marketing and Social Media, he knows what's what. He also has magnificent hair.



Search Intent Over Instinct

Consumers today are bombarded with choices. Every app, street corner and billboard offers another food option. When it comes down to it, most customers aren't looking for the trendiest name. They're searching for what's closest, most affordable and available now. In this highly competitive space, where proximity meets price sensitivity, search is where decisions begin.

Using Rogerwilco's WOLF tool, we analysed branded search patterns among 23 QSR and fast-food brands, between 1 May 2024 and 30 April 2025, to understand what South Africans are looking for when they intend to eat.



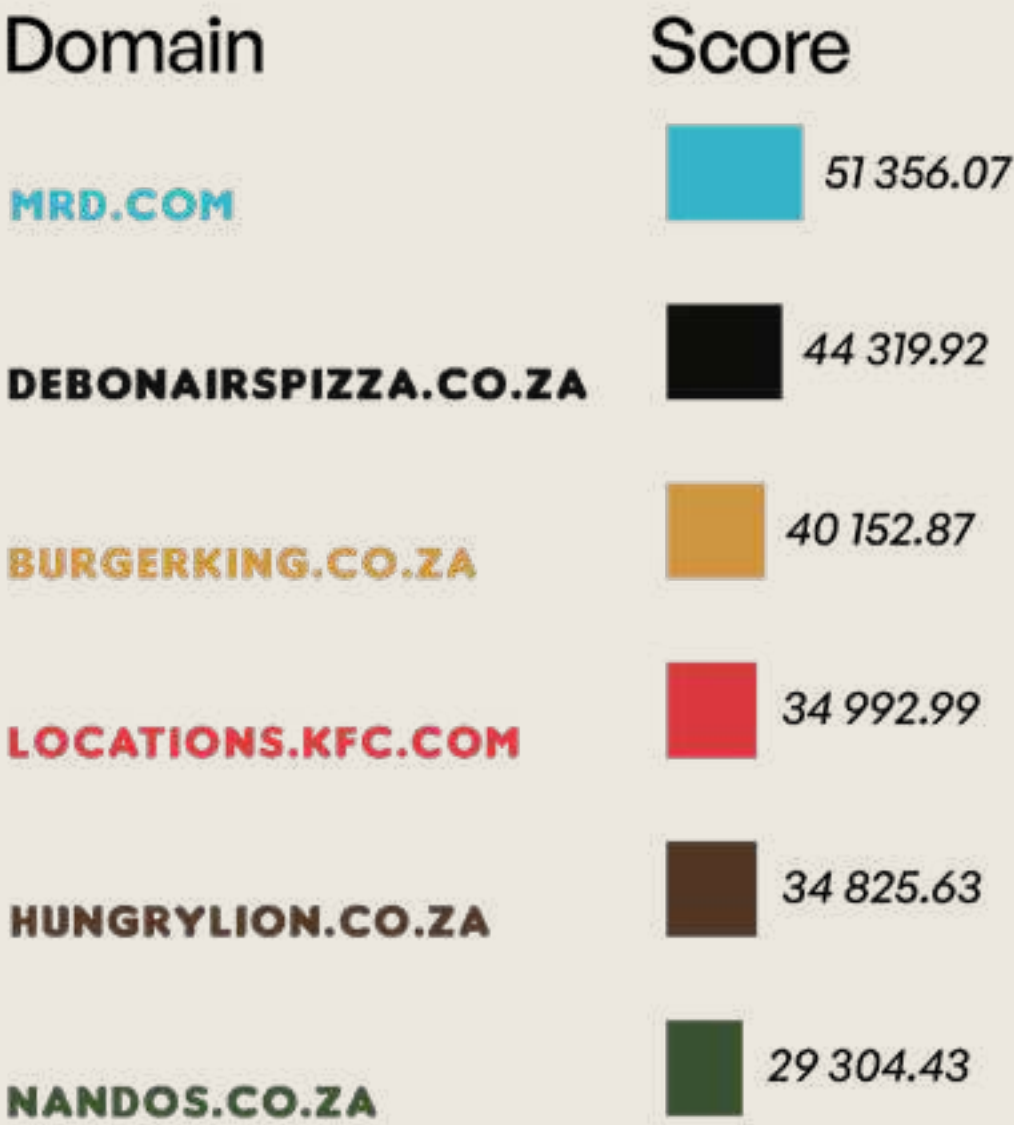
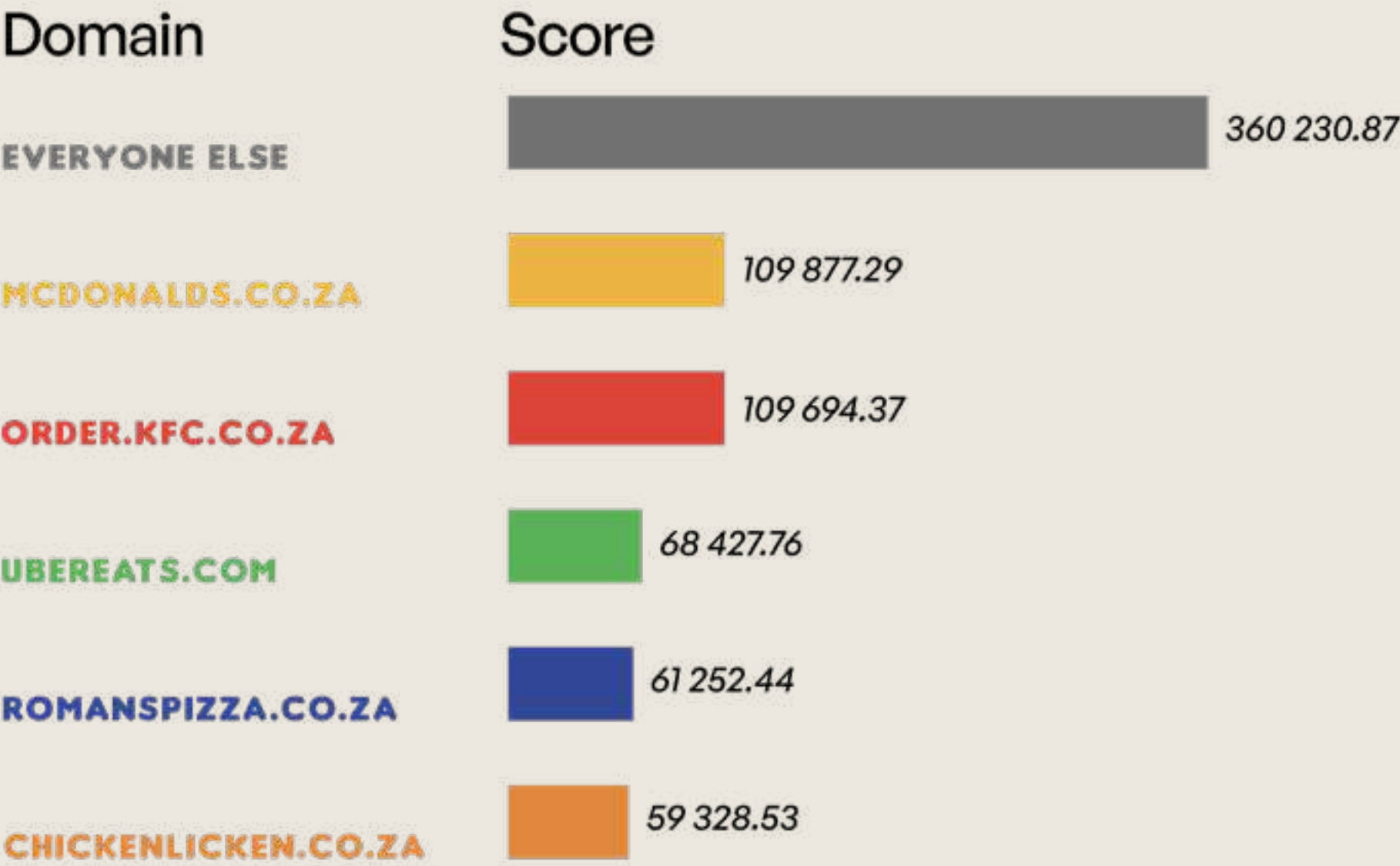
**“OVER 90% OF TOP-PERFORMING BRANDED SEARCHES INCLUDE
'NEAR ME' BECAUSE IN FAST FOOD, INTENT IS LOCATION-LED.”**

Share of Search as a Signal

Globally, Share of Search (SoS) is increasingly used as a leading indicator of market share. According to MyTelescope, there's an 83% correlation between a brand's SoS and its actual market share across categories like FMCG and QSR.¹ In fast food, where consumer decisions are habitual and immediate, SoS is a strong predictor of which outlet is top-of-mind and which brand is likely to get the sale.

MOST VISIBLE BRANDS

1 May 2024 - April 2025 (WOLF)



¹ Share of Search represents 83% of a brand's Share of Market (MyTelescope)



WOLF data shows that KFC and McDonald's lead the South African market, each capturing nearly 11% of total organic search visibility. That puts them far ahead of most of the category, with their branded domains dominating high-intent searches like "KFC near me" and "McDonald's specials". At the same time, 35.89% of visibility sits with the "Everyone Else" group, where smaller or less optimised domains compete for attention while falling short on discoverability.

"A 10% RISE IN SHARE OF SEARCH CAN LEAD TO AN 8% LIFT IN MARKET SHARE WITHIN JUST 2 TO 4 WEEKS."

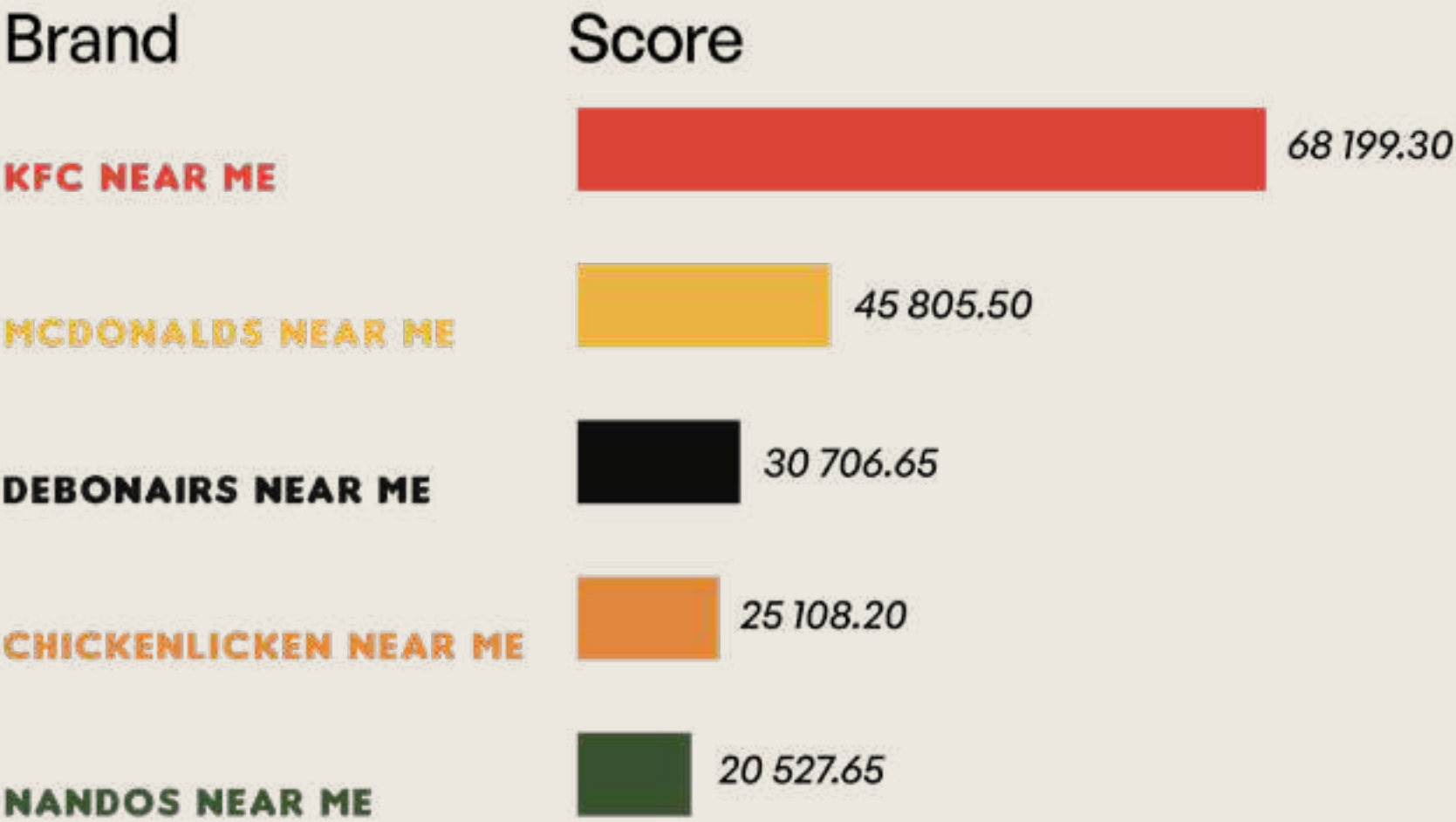
In fast food, where decisions are frequent and based on habit, SoS reflects more than interest; it often forecasts short-term sales. International research shows that a spike in SoS can lead to a sales lift within just 2 to 4 weeks, especially when driven by high-intent queries such as "[brand] near me" or "[brand] specials"².

Intent at Street Level

Search activity within this category is highly functional and tied to physical reality. It is often proximity-driven and reflects a need to act, not browse. Over 90% of the highest-performing branded searches captured in the WOLF report include “near me” terms, a clear indicator that people want to know where to find outlets.

TOP KEYWORDS PER BRAND

1 May 2024 - April 2025 (WOLF)





This is especially relevant in the township economy, where proximity can determine whether a transaction happens. As highlighted in Chapter 3, access to fast food is shaped by infrastructure, transport and affordability. In these communities, search becomes a proxy for location and, by extension, availability.

KFC, McDonald's, Hungry Lion, Chicken Licken, Nando's and Debonairs dominate in branded queries, but that interest isn't abstract. It's linked to network density and product familiarity. KFC, with over 1,000 outlets across South Africa, consistently ranks at the top of SoS data. This physical footprint supports its digital dominance, especially among lower-income consumers who value convenience, familiarity and portion size. Chapter 3 reveals that 73% of the mass market choose KFC more often than any other brand.

Visibility Doesn't Mean Love

SoS and sentiment often move at different paces. Chapter 2 reveals a 32% decline in overall fast-food brand mentions on social media year-on-year, with McDonald's seeing the sharpest drop at 47%. That said, search interest for major brands like KFC and Chicken Licken remained strong. This suggests that a brand can remain top-of-mind and commercially viable even when social media conversation wanes. Search activity, particularly for transactional terms like menus, deals and store locators, holds steady where social chatter may fade.



**“SEARCH IS WHERE INTENT MEETS DECISION. IF
YOU’RE NOT VISIBLE WHEN INTENT STRIKES, YOU’RE
NOT IN THE RUNNING.”**



Meanwhile, Roman's Pizza saw a 39% spike in social media mentions, largely driven by a hygiene scandal rather than a campaign. It underlines the difference between publicity and preference. SoS often reflects intent to engage or purchase, while spikes in sentiment may come from moments of crisis or controversy.

Nando's offers a unique case. While its SoS ranks below KFC and Chicken Licken, its cultural relevance and authentic voice in digital conversations often keeps it top-of-mind. Its ability to tie brand personality to current events has built both loyalty and talkability. While this may not always translate into higher search volumes, it builds brand equity that can influence both preference and long-term visibility.





Competing for the Click

Fast-food brands are not only competing with one another. Aggregator platforms like Uber Eats and Mr D intercept traffic for high-intent branded queries such as “McDonald’s delivery” or “Debonairs specials”, often ranking above the brand’s own website. This creates a traffic leak. Brands may attract interest but lose the sale if their owned platforms don’t appear in the search results.

Brands must strengthen their presence through content optimisation, technical SEO and campaigns that emphasise value, affordability and availability. These include price-driven offers, app exclusives and locally relevant menu deals. The Township CX Report shows that 63% of township consumers prioritise good service³, and most spend between R50 and R100 on fast food. It’s in this band of affordability that search terms like “cheap burger near me” or “family meal for under R100” become high-conversion triggers.

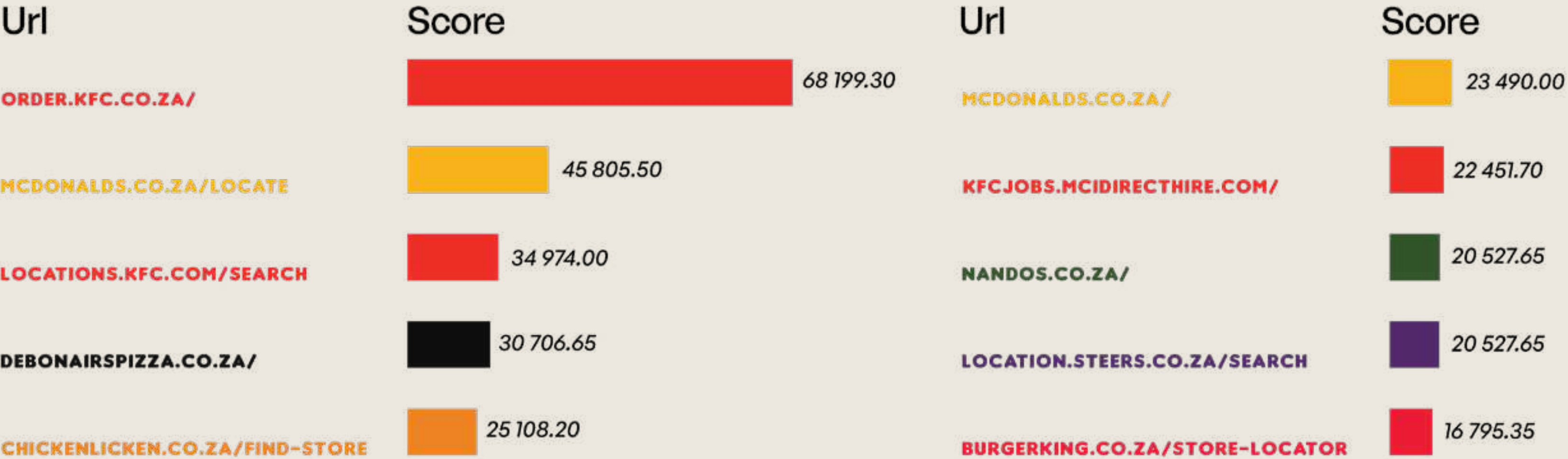
Function Leads Conversion

The WOLF report shows that the most visited pages are store locators, menus and specials pages. This reinforces a simple point: in fast food, people search with the intent to act. They’re solving for hunger, often based on convenience, time of day or price.

Brands that structure their digital experiences around this functional intent, making it easy to find location, menu and pricing are more likely to convert interest into orders. Chapter 3 supports this with data showing that most township purchases happen over weekends, where decisions are made based on feeding families, not individuals.

TOP SITES

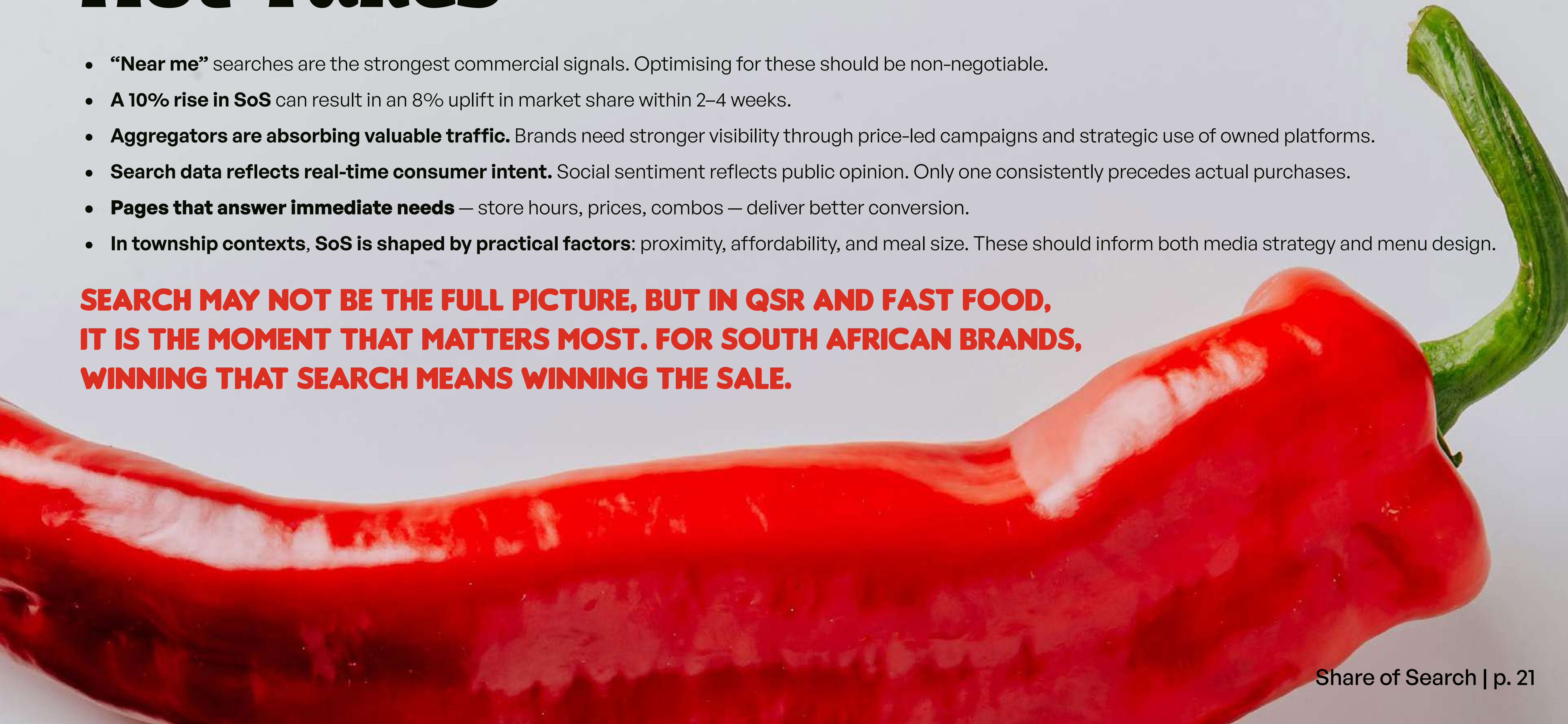
1 May 2024 - April 2025 (WOLF)



Hot Takes

- **“Near me”** searches are the strongest commercial signals. Optimising for these should be non-negotiable.
- **A 10% rise in SoS** can result in an 8% uplift in market share within 2–4 weeks.
- **Aggregators are absorbing valuable traffic.** Brands need stronger visibility through price-led campaigns and strategic use of owned platforms.
- **Search data reflects real-time consumer intent.** Social sentiment reflects public opinion. Only one consistently precedes actual purchases.
- **Pages that answer immediate needs** — store hours, prices, combos — deliver better conversion.
- **In township contexts, SoS is shaped by practical factors:** proximity, affordability, and meal size. These should inform both media strategy and menu design.

SEARCH MAY NOT BE THE FULL PICTURE, BUT IN QSR AND FAST FOOD, IT IS THE MOMENT THAT MATTERS MOST. FOR SOUTH AFRICAN BRANDS, WINNING THAT SEARCH MEANS WINNING THE SALE.



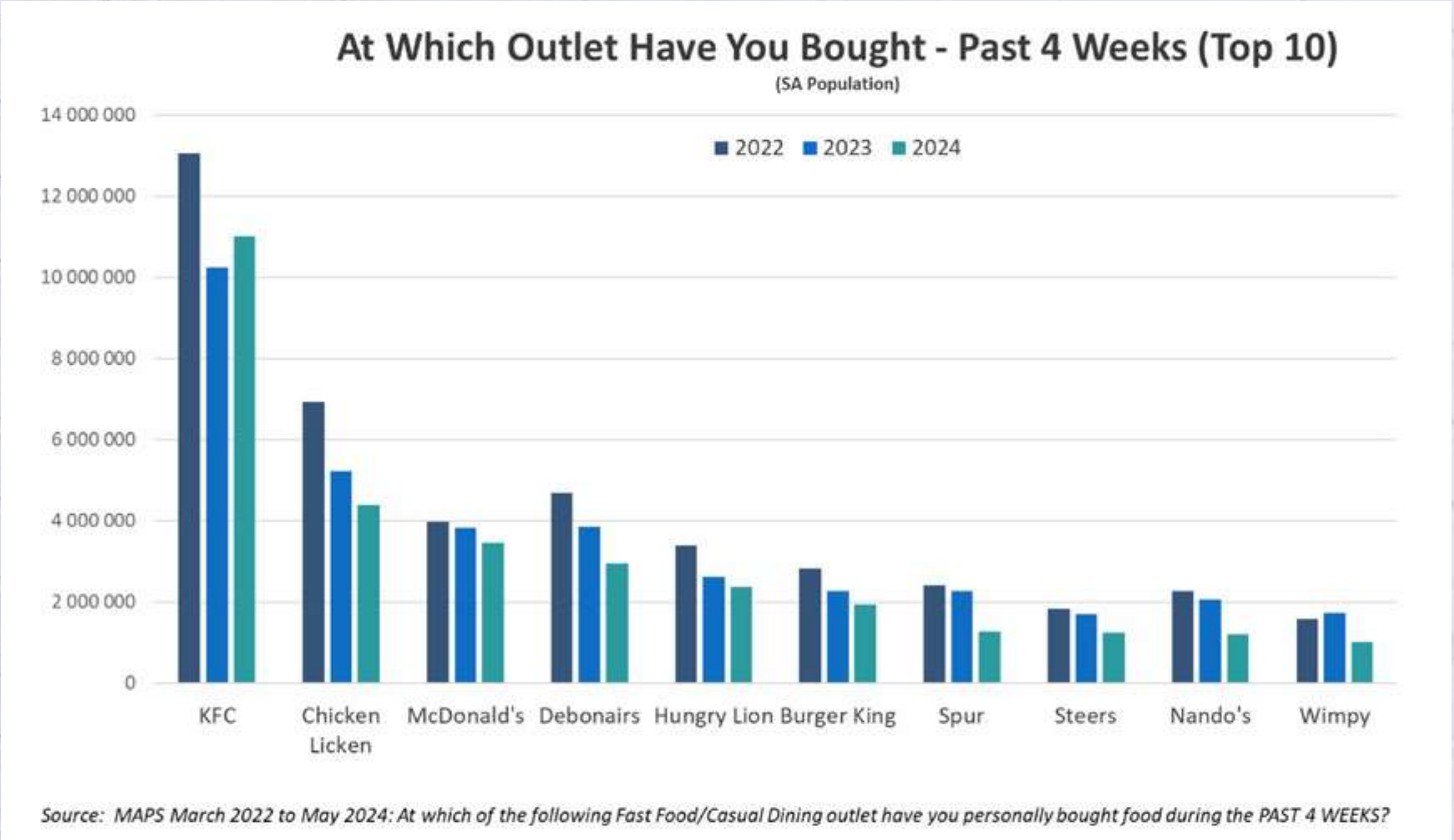
Slow Feels for Fast Food

South Africa's fast-food industry often reflects the nation's culture, from its humour to its hardships. It's a category that thrives on conversation, but the volume of that chatter has slowed down. According to Brandwatch data (1 May 2024 – 30 April 2025), social media mentions across 23 major fast-food brands dropped by 32% year-on-year (YoY). While KFC, Chicken Licken, McDonald's, Debonairs and Hungry Lion continue to lead in market penetration, they're being spoken about less, suggesting that not every bite is making it into the group chat.





Data from Eighty20 shows that 16.28 million South African adults ate from the country’s top five fast food outlets — KFC, Chicken Licken, McDonald’s, Debonairs and Hungry Lion — in the past month. But reach doesn’t always equal resonance⁴.



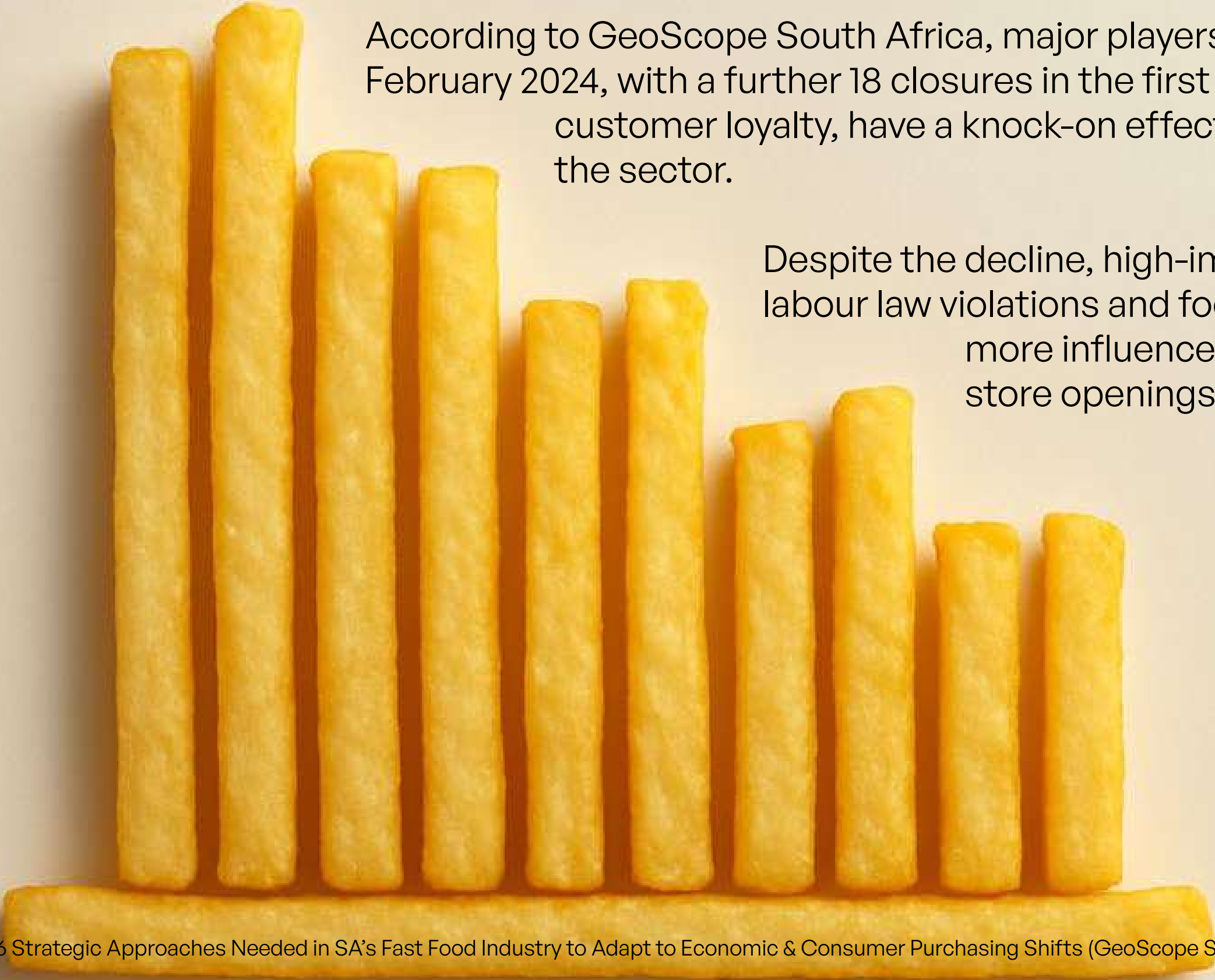
4 South Africans love their fast food... especially KFC

Conversation See-saw

Brandwatch data from 1 May 2024 to 30 April 2025 shows the fast-food industry generated over 65,000 mentions, reflecting a 32% decrease compared to the previous year. The correlation between the drop in brand mentions and a possible decline in fast food purchases makes sense, particularly in the context of high inflation and South Africa's unemployment rate of 32.9% in Q1 2025⁵. This decrease in conversation volume is further reflected in a 23% fall in unique contributors. The reduction in voices suggests less public discourse, which may also be linked to a slowdown in marketing spend or fewer major promotions and viral moments compared to the previous year.



“MENTIONS DROPPED BY 32%, BUT EXPECTATIONS ARE RISING AS PEOPLE WANT VALUE, TO FEEL SEEN AND BRANDS THAT STAY IN TOUCH.”



According to GeoScope South Africa, major players like Famous Brands closed 47 underperforming outlets between March 2023 and February 2024, with a further 18 closures in the first half of 2025⁶. These closures, driven by changes in purchasing behaviour and declining customer loyalty, have a knock-on effect on revenue, ultimately putting pressure on marketing and advertising spend across the sector.

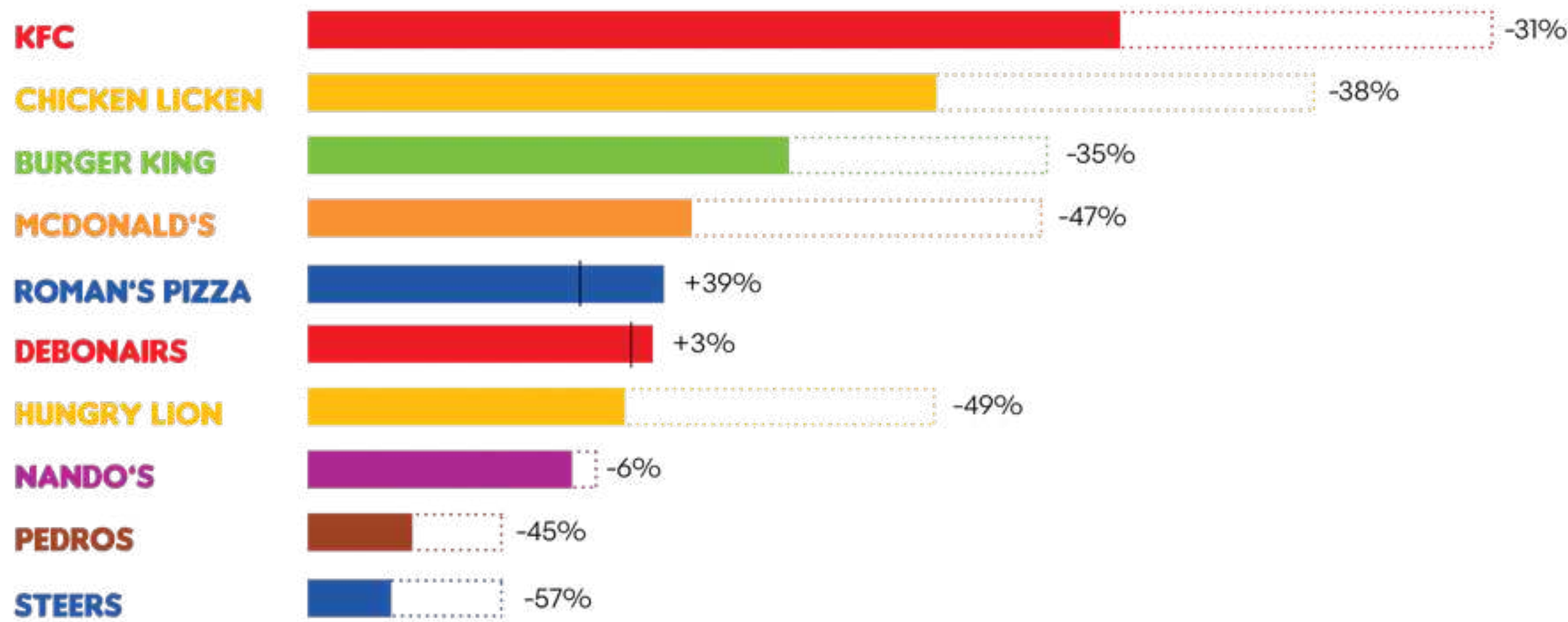
Despite the decline, high-impact topics still drove spikes of conversation around key themes, including inspections, labour law violations and food safety concerns. These instances highlight a realignment in public discourse, now more influenced by issues of accountability and social standards than by promotional campaigns or new store openings.

⁶ Strategic Approaches Needed in SA's Fast Food Industry to Adapt to Economic & Consumer Purchasing Shifts (GeoScope South Africa)

In contrast to previous years, which saw viral moments like Nando's satirical campaigns responding to political events, the 'KFC Inspector' involving a man posing as a quality checker for free meals and KFC's #MakeItKFC challenge that turned everyday meals into KFC creations, the past year lacked cultural flashpoints that typically generate widespread engagement.

TOP 10 MOST MENTIONED FAST-FOOD STORES

(1 May 2025 - 30 April 2025) – (Source: Brandwatch)



Drop in Mentions

The top 5 most mentioned fast-food outlets (KFC, Chicken Licken, Burger King, McDonald's and Roman's Pizza) account for 68% share of voice from the 23 fast brands analysed. The top 5 saw an average 22,4% drop in YoY mentions. These leading brands reflect the findings in chapter 3, which show that KFC, burgers and fried chicken dominate menu choices across income levels.



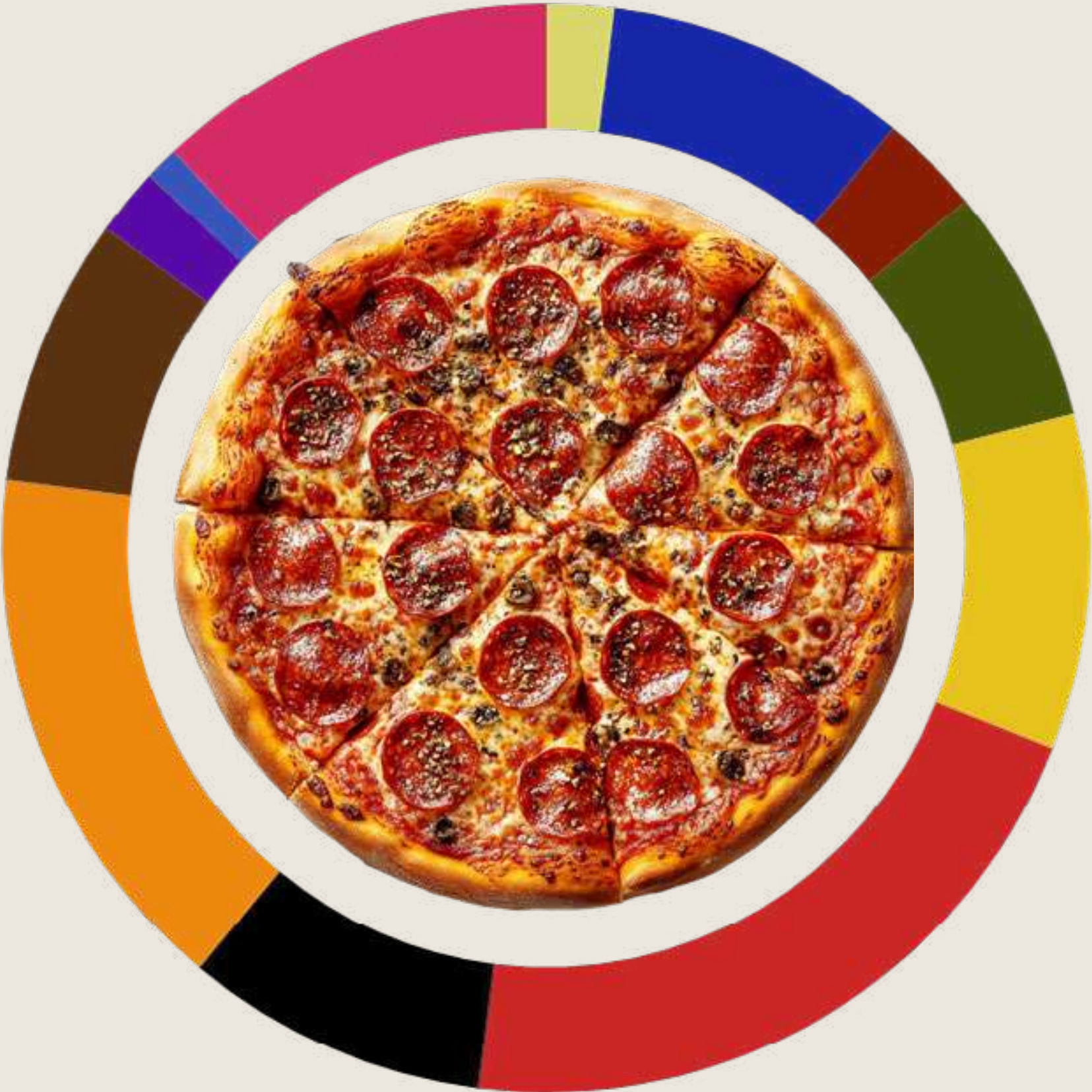
McDonald's saw the highest decline in mentions in the top 5 most talked about brands, with a 47% decrease in mentions YoY. This follows the brand's global 1% fall in sales as consumers battle with the effects of inflation⁷. In South Africa, this shift comes at a time when the brand saw a 2% decrease in sales amid a change in leadership⁸.

⁷ McDonald's global sales post surprise drop as tariff chaos hurts consumer confidence (Reuters)

⁸ McDonald's SA CEO steps down (The Citizen)

CATEGORY SHARE OF VOICE

(1 May 2025 - 30 April 2025) – (Source: Brandwatch)



- Pizza perfect (2%)
- Pedros (3%)
- McDonald (10%)
- Debonair (9%)
- Hungry Lion (8%)
- Andiccio24 (1%)
- Romans (9%)
- Nandos (7%)
- KFC (21%)
- chicken Licken (16%)
- steers (2%)
- Burger King (12%)

The Viral and the Outliers

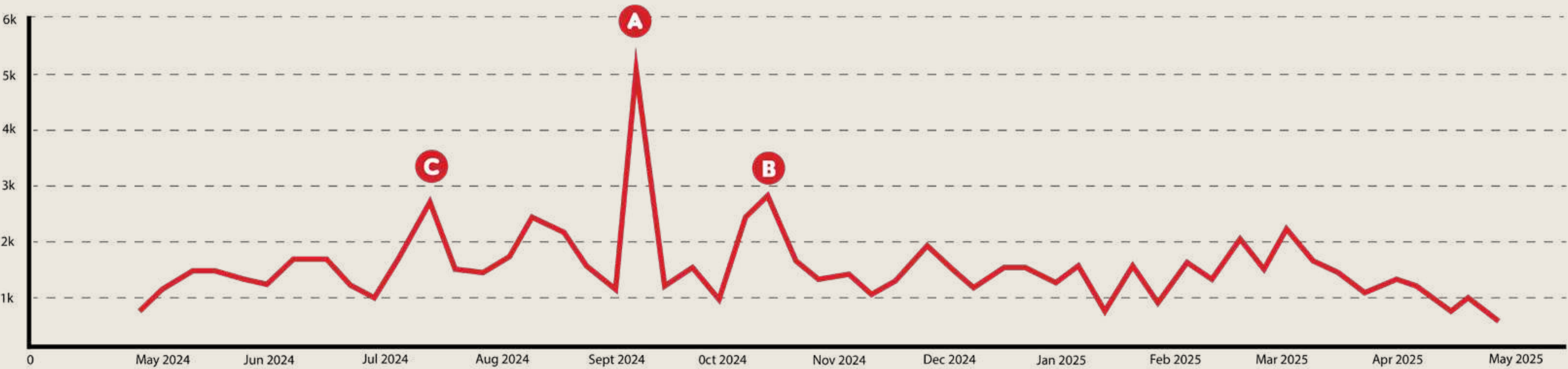
Contrary to the narrative that all news is good news, Roman's Pizza saw its highest spike in mentions after a video emerged showing an employee in Mayfield handling used pizza boxes retrieved from a dustbin. The clip quickly went viral, sparking social media backlash and concerns about food hygiene. The video drove the most posts on 9 September, as shown in the graph below, and contributed to the brand's 39% year-on-year surge in mentions. This single incident triggered widespread calls for accountability and transparency from the popular pizza chain and serves as a clear reminder for all fast-food brands to be more open about their operations.

Although there were fewer moments of cultural flashpoint virality in the reporting period than in previous years, Nando's did, of course, stay true to form and saw a spike on X after reposting someone else's content about a celeb couple with their own spicy comment. While Nando's, like most of the fast food and quick service industry, saw a YoY decline in mentions, it was among the lowest at 6%. This is a testament to the brand's authenticity paying off at a time when South Africans need a bit of humour to lighten the load.



FAST FOOD BRAND MENTION TRENDS

1 May 2024 - 30 April 2025: (Source: Brandwatch)



- A** – Roman’s Pizza scandal mentions
- B** – Nando’s tactical x post
- C** – Chickenlicken called out on x for salt usage

Chicken Licken saw the third biggest spike in mentions with a combination of posts calling for the brand to reduce salt in their meals, while others celebrated the brand for its advertising. As customers become more health-conscious, they express their opinions about the fast foods they love and gravitate towards. While this may seem negative, it also presents an opportunity for fast-food brands to show that they are listening by engaging in conversation.

While Hungry Lion saw a 49% drop in mentions compared to the previous year, the brand still generated positive sentiment, not from promotional campaigns but from operational wins. The opening of its 400th store was celebrated across social platforms, reinforcing its presence and growth in Africa. As highlighted earlier in Eighty20's research, consumers rate Hungry Lion highly for its generous portions, which continues to drive loyalty in a market where value for money matters. These factors show how brand sentiment can be built through tangible customer value, not just advertising.



Nando's X Post: (Source: X)

“VIRAL MOMENTS DON'T BUILD LOYALTY. CONSISTENCY, RELIABILITY AND SHOWING UP WHEN IT COUNTS DO.”

Loyalty Hinges on More Than Taste

Social Tech & Consumer Insights Specialist at YOUKNOW, Shaun Pearson, believes social media remains central to public discourse about fast food. “Consumer-generated content, from reviews and complaints to personal meal showcases, continues to dominate online conversations”, he says. Some fast-food outlets leverage these mentions as part of their always-on strategies, while others lag and risk being forgotten.

Loyalty in the fast-food space is no longer just about flavour or familiarity. The 2024 South African Customer Experience Report found that 71% of consumers rate reliability as the top reason for repeat purchases. Price ranked second at 63%, followed by stock availability and credibility. Quick service restaurants were also the top-rated sector for service delivery, reinforcing that the category is living up to the reliability consumers expect⁹.



Data also shows that the most viral conversations are fuelled by consumer watchdog behaviour, not by brand marketing. While these crises compel brands to face some hard truths, they also present an opportunity to take accountability and show transparency, which consumers increasingly expect and appreciate. People value quality food at affordable prices while also wanting to be heard by the brands they support. In the fast-food industry, this means responding to consumer conversations and demands with meaningful action and relevant products. Some, like Nando's, McDonald's and KFC, are seizing the opportunity. In cases where change isn't immediately possible, brands can still benefit by actively participating in the conversation.





Presence Over Promotion

Mentions may be down, but expectations are rising. In the current climate, fast-food brands that succeed are not the loudest but the most consistent. People want value and respect. They want humour that lands, food that satisfies, and brands that show up when it matters.

Fast food is no longer just about what's served. It's about how it makes people feel. Brands that understand this will keep customers talking, even when times are tough.



Hot Takes

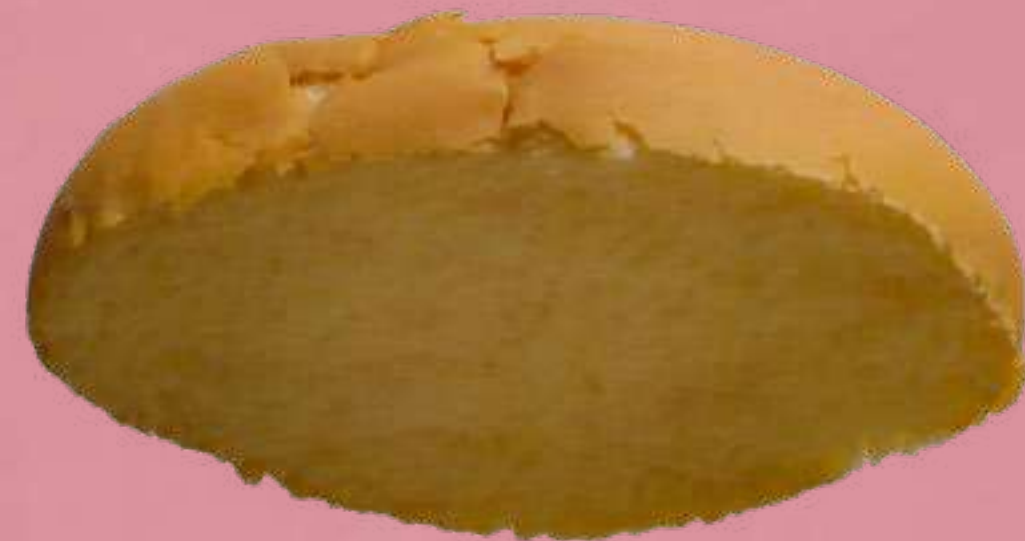
- **Health gains momentum:** Chicken Licken's mentions surged partly due to consumer calls for reduced salt, showing that health concerns are starting to influence fast food conversation.
- **Consumer-led conversations dominate:** Viral moments like Roman's Pizza's hygiene incident show watchdog behaviour is stronger than brand messaging.
- **Customer experience trumps brand noise:** With QSRs ranked highest for service delivery (2024 SA CX Report), consumers reward consistency and credibility more than brand-driven hype.
- **Store growth wins hearts:** Hungry Lion's positive sentiment, despite a 49% drop in mentions, was driven by its 400th store opening, proving that physical growth boosts perception.
- **Consistency over virality:** Nando's 6% decline (versus the average 22.4%) shows how tone, humour and responsiveness protect relevance.

Combos & Contrasts

THE PRICE OF PREFERENCE

South Africa's fast-food industry highlights a clear divide between two broad markets. A 2024 survey by MoyaApp, involving 3,500 respondents from all nine provinces, offers insight into how the mass market engages with fast-food and QSR brands. This group, also referred to as the main market, includes households earning up to R10,000 per month. In contrast, the consumer class comprises urban, working professionals with significantly higher household incomes.





AGE: 25-44(65%)

GENDER: 2 in 3 are female

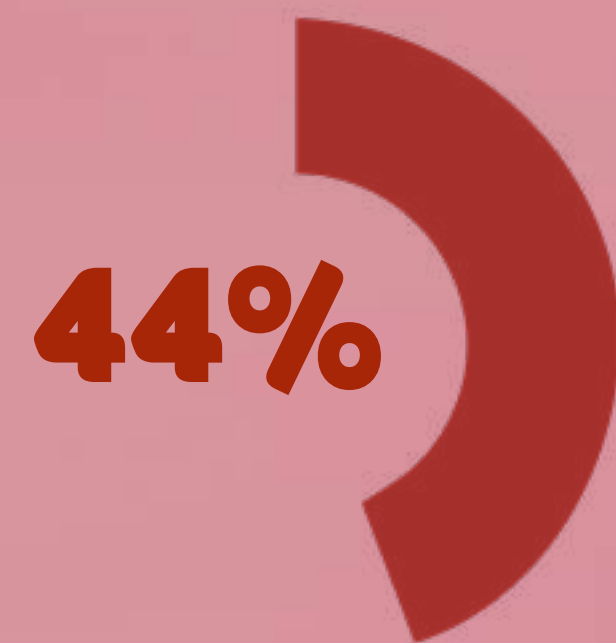
LOCATION: 53% live in townships,
25% rural

CAREGIVING: 69% care for children

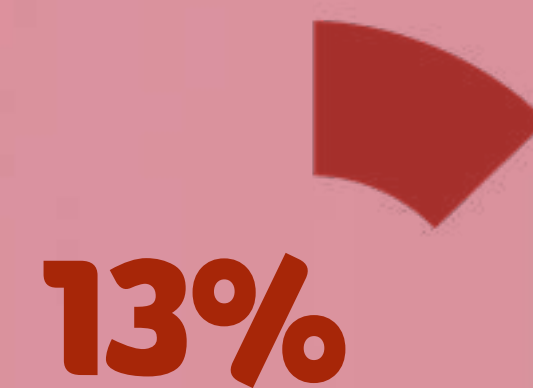


Mom's Way

Search data from Chapter 1 shows KFC and McDonald's dominating brand interest in share of search, while sentiment trends from Chapter 2 reveal waning conversation. Data from the MoyaApp survey shows that fast food is part of a routine for the mass market, in contrast to the consumer class, who view it as a convenience. The survey found that 44% of mass market consumers are unemployed, 13% are employed part-time and most reside in townships.



UNEMPLOYED



PART-TIME WORK

"73% OF MASS MARKET CONSUMERS SAY FLAVOUR COMES FIRST AND THEY WON'T TRADE TASTE FOR AFFORDABILITY."



As highlighted in Chapter 2, viral moments and social media sentiment often drive broader conversations. In this segment, however, the real decision-makers are caregivers. Findings reveal 69% of respondents care for families and often see fast food as a shared experience.

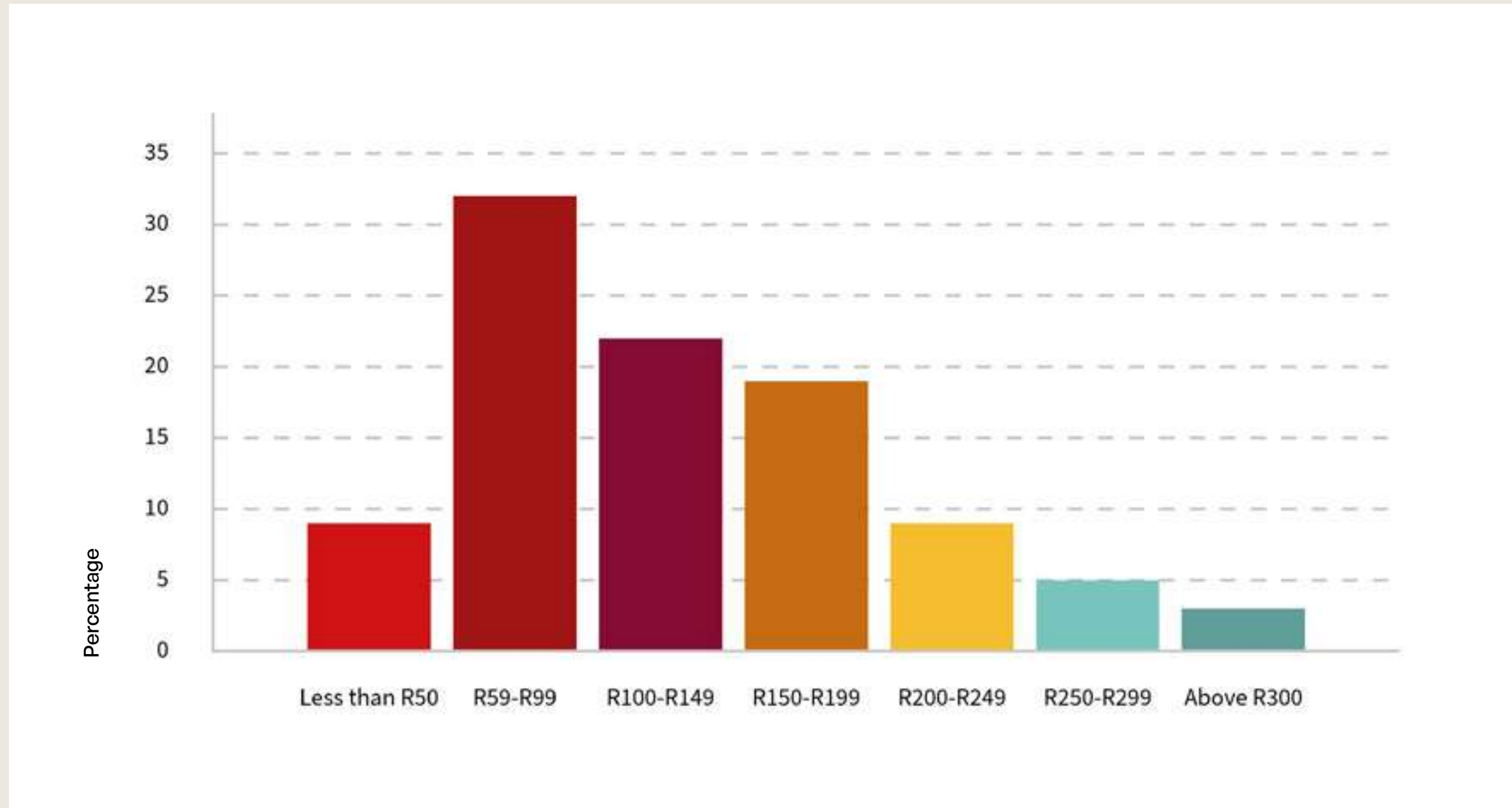
“Perhaps most overlooked is the role of the mom or caregiver, who often acts as the household’s chief budget-balancer and food decision-maker. They are value-driven, but not at the expense of quality or dignity,” says Shana Abrahams, Head of Research at MoyaApp.

Marketing that speaks to the daily hustles and routines of caregivers, particularly mothers who often manage household budgets and meal choices, carries more weight than flashy discounts or influencer content. Brands that listen, engage authentically, and deliver on both taste and trust will be best positioned to connect with this overlooked yet influential consumer group.

As the report suggests, brands that listen, engage authentically, and offer both flavour and familiarity will be best positioned to win over this influential and often underestimated consumer segment.

ON AVERAGE, HOW MUCH DO YOU USUALLY SPEND PER PERSON WHEN BUYING FAST FOOD?

Source: MoyaApp & MoyaResearch Feeding the Nation: Fast Food Habits in South Africa’s Mass Market

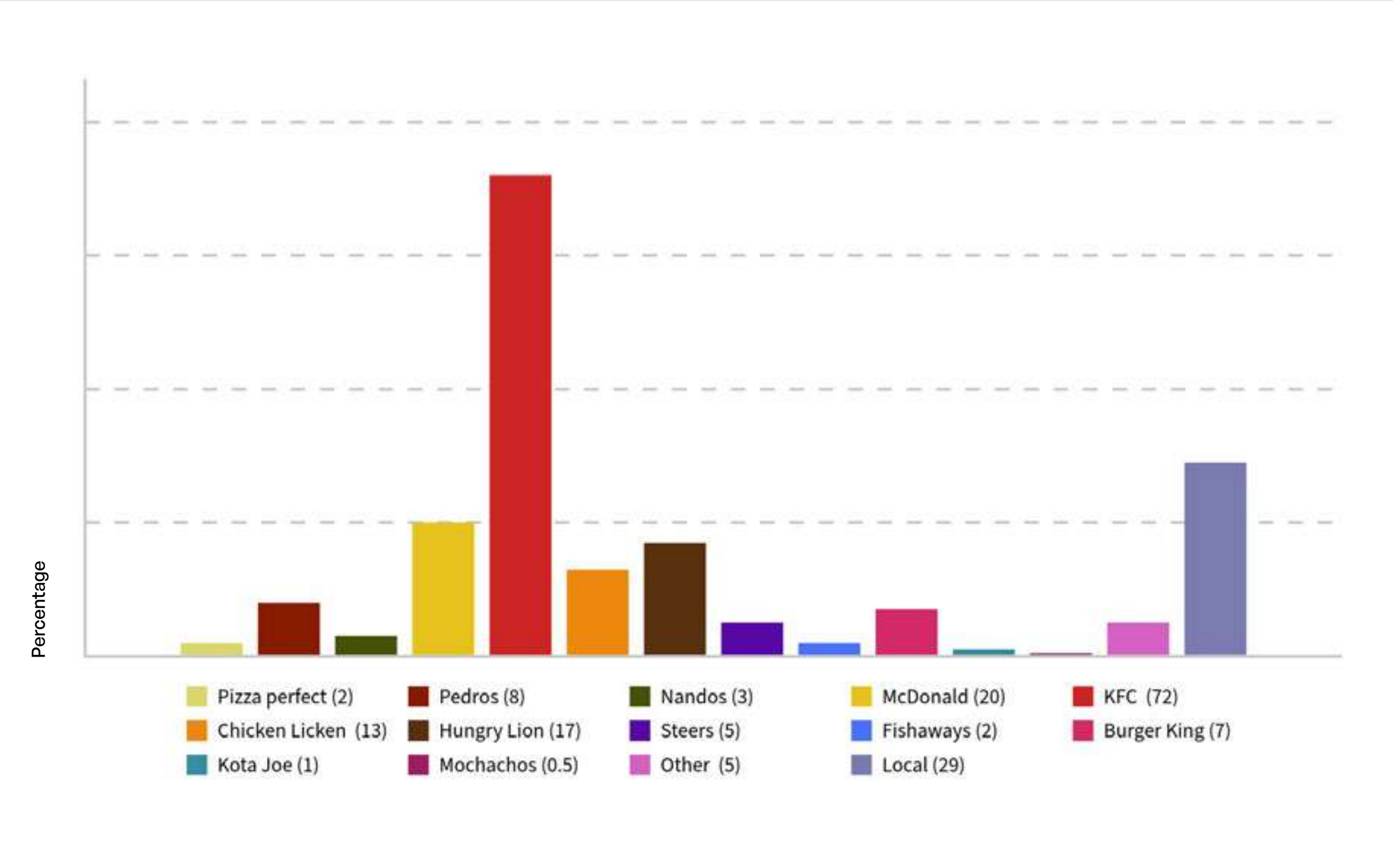


Make that Combo Bigger

Most respondents say they spend less than R150 per person to feed families, with 56% seeking out combos that offer value. The R50 to R99 range is the most common spending bracket, preferred by 35% of participants. As QSR and fast-food outlets navigate economic constraints, it’s worth noting that the mass market consumer is in search of combos within the R50–R100 price point.

WHICH FAST FOOD PLACES DO YOU BUY FROM THE MOST?

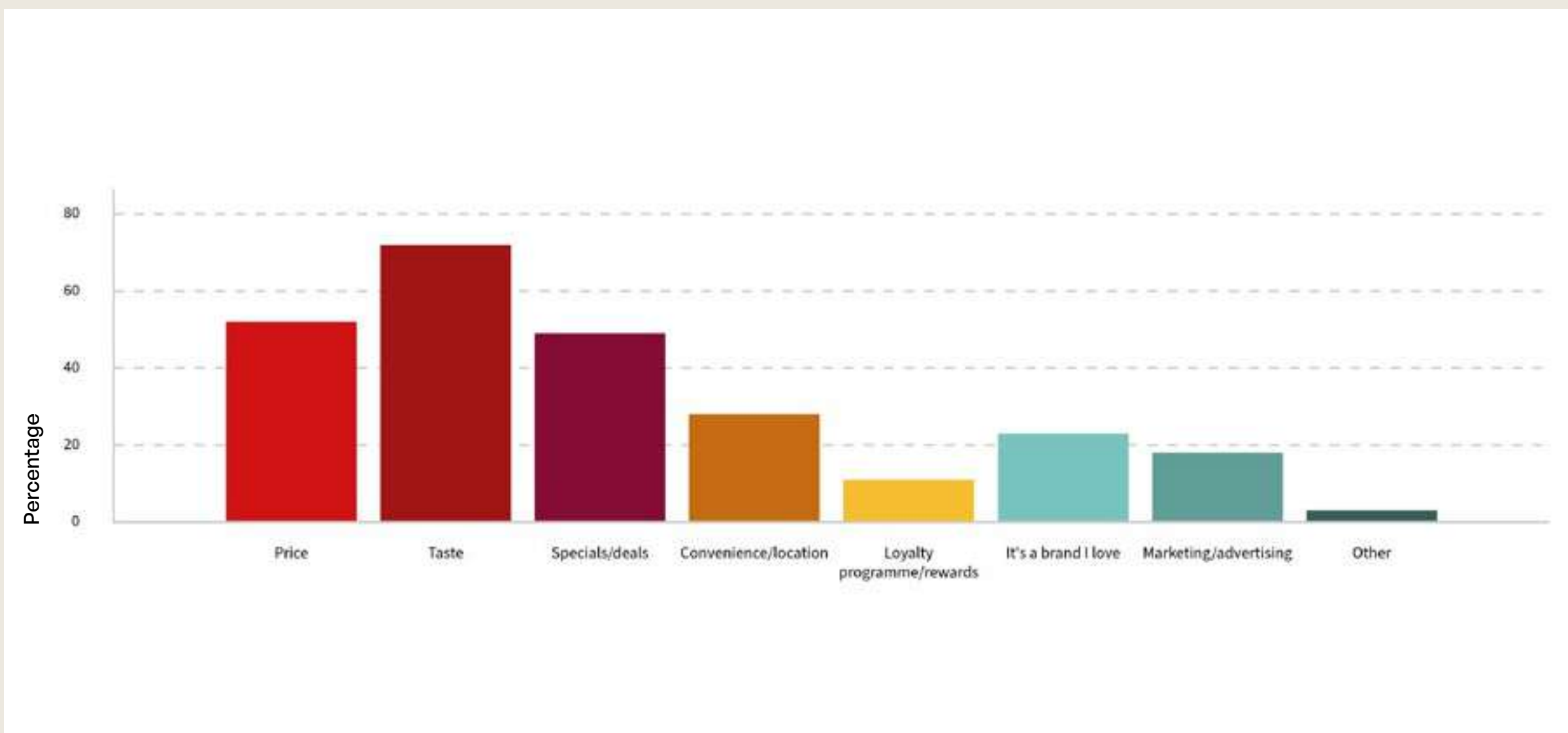
Source: MoyaApp & MoyaResearch Feeding the Nation: Fast Food Habits in South Africa’s Mass Market



In line with findings in Chapters 1 and 2, KFC, Chicken Licken, McDonald’s, Debonairs and Hungry Lion dominate menus, share of search and digital conversations. KFC leads with 73% of respondents saying they buy from the brand more often than competitors. Still, nearly a third of respondents say they prefer local outlets like the neighbourhood shisanyama or informal traders selling braaied chicken, widely known as chicken dust.

WHAT MAKES YOU CHOOSE ONE FAST FOOD PLACE OVER ANOTHER?

Source: MoyaApp & MoyaResearch Feeding the Nation: Fast Food Habits in South Africa’s Mass Market



Beyond the Craving

Price and value matter, but taste stands out as the strongest driver, with 73% of respondents saying brands should not compromise on flavour in favour of affordability. In townships, options like kota (quarter bunny chow or sphaltlo), chicken dust, sheep’s head and magwinya remain favourites because they offer both flavour and familiarity. When brands try to adopt these dishes without understanding their cultural nuances, they risk consumer backlash as KFC saw with its kota launch.¹⁰

¹⁰ Who’s kota is it anyway? Entrepreneur takes on KFC over ‘Sphaltlo’ idea (Timeslive)

The 2024 Township CX Report notes that many consumers want brands to show they understand their context, with 24% highlighting this need. Male respondents expressed a strong preference for township fast food brands, with 18% citing their uniqueness. Calls for improved customer experience are significant, as 63% of respondents want better overall service and most rank good service as crucial to loyalty.¹¹

Location plays a crucial role. As cited in Chapter 1, the share of search data revealed that more than 90% of the top-performing branded queries are paired with “near me”. Customers often know what they want; they just want it closer. KFC, with a network of more than 1,000 outlets, benefits from this.¹² Local vendors, however, thrive on proximity and word-of-mouth, a powerful channel in townships as highlighted in the Township CX Report.



¹¹ The 2024 Township CX Report

¹² The Biggest Fast-Food Franchises In South Africa In 2024 (SA Franchise Brands)



“ R50 to R99 is the sweet spot where value meets family meals in the mass market.”

The Weekend's Special

The majority of respondents (80%) claimed that they buy fast-food on Friday and Saturday, which is also when families spend time sharing meals together. These two days carry emotional and cultural significance in many households, marking payday, social gatherings and shared memories. For some, this is the only time in the week when they can enjoy takeaways with their families.

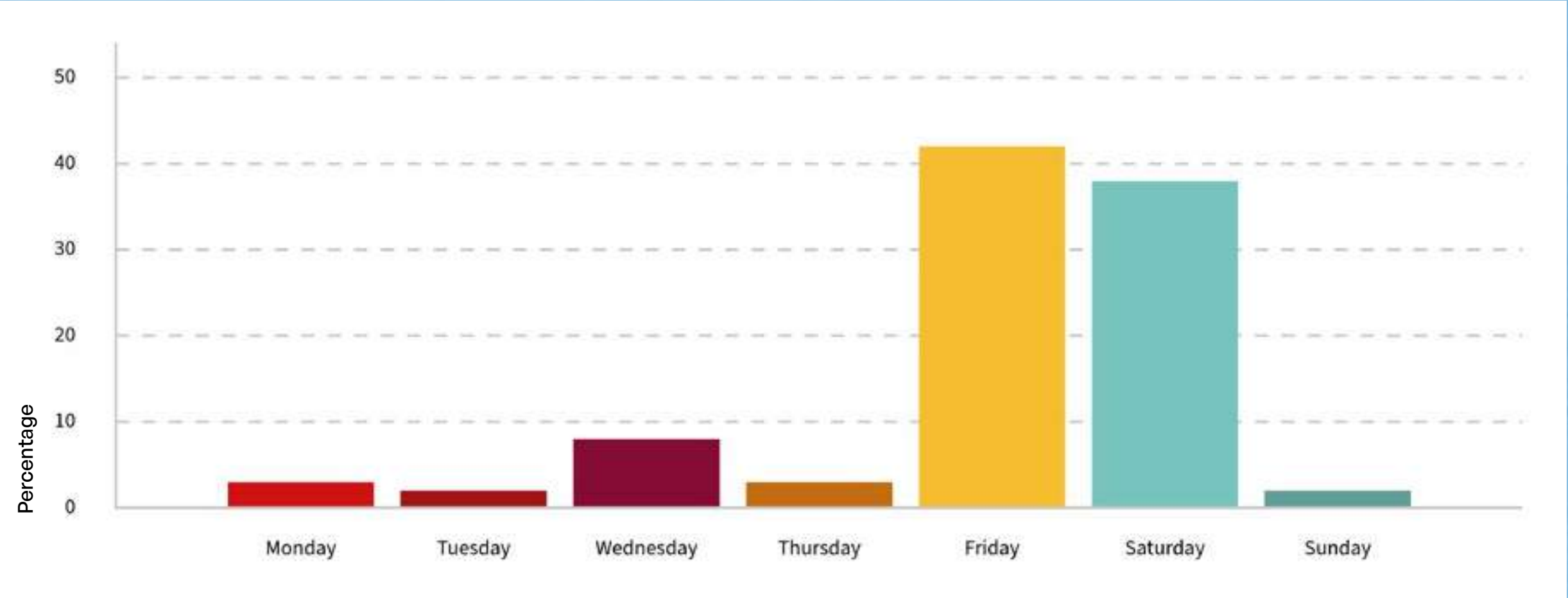
Brands that tap into this rhythm by offering family-size meals, menu options for all ages and messaging that resonates with the celebration of weekend wins can strengthen loyalty. Combos designed for sharing, price points that reflect real household budgets and visibility in township markets are all essential.

As Miles Kubheka, CEO of Gcwalisa, points out, townships have a night and weekend market. These are critical windows for brands to show up.



WHAT DAY OF THE WEEK DO YOU USUALLY BUY FAST FOOD?

Source: MoyaApp & MoyaResearch Feeding the Nation: Fast Food Habits in South Africa’s Mass Market



Access and Delivery Challenges

A close-up photograph of a person's mouth, showing their teeth and red lips. Two dark wooden chopsticks are holding a piece of sushi, which is being brought towards the mouth. The sushi is topped with salmon, white rice, and a green garnish. The background is dark and out of focus.

In the mass market, 44% of respondents say they consume fast food weekly, while 63% buy it at least twice a month. According to the 2023 Township CX Report, cited by the *Mail & Guardian*¹³, 20% of township consumers considered using Uber Eats for grocery delivery. This figure is typically higher in suburbs, often between 35% and 45%. In many township areas, consumers often need some form of transport to access fast food outlets, adding layers of inconvenience and additional cost.

¹³ The appetite for food delivery services in townships is growing (M&G)


**“CAREGIVERS, MOSTLY MOTHERS, ARE THE QUIET
POWER BEHIND FAST-FOOD DECISIONS AND BRANDS
IGNORE THEM AT THEIR PERIL.”**





The Three Tiger Index

In local slang, R10 is a “tiger”, and three tigers, or R30, is a realistic spend for individuals in the mass market. According to Stats SA’s 2024 National Poverty Lines, R796 per person monthly (about R27 a day) is the threshold for basic nutritional needs¹⁴. The Three Tiger Index offers a lens into what can be bought at this price point.



Respondents say that KFC's Streetwise and McDonald's Nazo Meals stand out in this space. Burger King's King Value Meals and non-branded options also compete here. This is where affordable single-serve meals allow customers to participate in the fast-food economy, when not buying for a family.

The divide in fast-food reflects access, context and cultural relevance. Brands that dominate attention in digital and traditional spaces still face competition from local food culture, word-of-mouth and proximity.

From Combo to Connection

For the mass market, fast-food serves a purpose. The brands that understand and respect this context will be the ones that earn lasting trust, loyalty and share of wallet.



Hot Takes

- **Flavour first:** Most mass market consumers choose fast food based on taste, not just price.
- **R50–R100 is the combo sweet spot:** This is the most common spending range per meal.
- **Weekend wins:** Most respondents buy fast food on Fridays and Saturdays.
- **Township culture leads:** Local meals like kota and chicken dust remain strong contenders.
- **Caregivers drive decisions:** Budget-holders want value but won't compromise on quality.

Conclusion

PRESENCE OVER PROMISES: WHAT IT TAKES TO WIN IN FAST FOOD TODAY

South Africa's fast-food and QSR landscape is at a turning point. The data in all three chapters — search behaviour, social sentiment and consumer spend — shows that value, trust and relevance now matter more than ever.

In Chapter 1, the share of search data highlights that consumer intent often begins online. KFC and McDonald's lead in brand interest, driven largely by convenience and visibility. The dominance of "near me" in top queries shows that physical access remains a major deciding factor. Brands that invest in local SEO and physical presence in key locations will stay top of mind and closer to purchase decisions.

Chapter 2 paints a quieter picture. Mentions across major brands dropped by 32% year-on-year. While the industry still commands reach, the conversation has slowed. Fewer campaigns, economic pressure and rising food prices have impacted volume and enthusiasm. Still, the spikes that occurred were driven by moments of humour, cultural relevance or controversy. Brands like Nando's held steady, while Roman's Pizza shattered the adage: "no news is bad news."



The third chapter brings us to the heart of the market: households earning up to R10,000 per month. Based on MoyaApp data from 3,500 respondents, fast food in this segment is often a shared family treat. Most caregivers, especially mothers, are the ones choosing the meals. They look for flavour, dignity, value and combos priced between R50 and R100. The Three Tiger Index (R30) gives brands a benchmark for single-serve meals in this income group.

Flavour, affordability and reliability now define brand loyalty. Consumers want combos that make sense for their budgets, service that respects their time and brands that reflect their lives. Whether it's a shisanyama around the corner or a global chain with a weekend special, the same rules apply; show up, offer value and mean what you say.



NO NEWS IS BAD NEWS.

Is It Though?

Key Takeaways for Brands

- Optimise for local intent. “Near me” searches must lead to actual foot traffic.
- Keep the conversation going. Fewer mentions don’t mean less interest.
- Value is more than price. Meals should reflect real budgets without compromising on taste.
- Caregivers, especially mothers, are the decision-makers. Speak to their needs.
- Cultural context matters. Understand your market before trying to imitate its cuisine.

THE OPPORTUNITY IS THERE FOR BRANDS THAT STAY CLOSE TO CULTURE, CONSISTENT IN DELIVERY AND CLEAR ABOUT THE PEOPLE THEY SERVE.





Better by Design Driven by Purpose

At Rogerwilco, we help brands forge meaningful connections with their customers by crafting digital experiences that deliver measurable results. As Africa's largest B Corp-certified digital agency, we go beyond conventional metrics, ensuring our work drives impact for clients, communities and the planet.

Our industry reports equip marketers with insights that reveal what truly resonates with audiences. Our B Corp certification reflects our commitment to governance, sustainability and ethics, reinforcing our dedication to business as a force for good.

Visit us at www.rogerwilco.co.za

A Partner with Purpose

We partner with brands that see marketing as a platform for building trust, creating value, and driving impact. Our approach is rooted in insights that help brands connect with their audiences in meaningful ways.

Through our industry reports, we break down digital trends shaping consumer behaviour, giving marketers a clear understanding of what drives engagement, sales and loyalty. These reports move beyond surface-level data, offering practical insights that help brands stand out and connect effectively.

At Rogerwilco, “better” isn’t just a goal – it’s our commitment to our clients, our team and the communities we proudly serve.

Contact us: <https://www.rogerwilco.co.za>

YOUKNOW Technologies

We're here to make martech less hectech, enabling local brands to better understand and connect with their customers. As the premium martech supplier for over a decade, we help make data useful.

From tech implementation and onboarding to ongoing managedservices, we are focused on helping our clients get more from their tech investments. Unlock customer insights, drive higher customer retention and build better digital experiences for your customers.





Connecting YOU to Global Technology

**CONNECT BETTER,
GROW FASTER.**

YOUKNOW partners with the world's top technology companies to build custom integrated tech stacks centred around your specific business needs and goals. You get access to best-in-breed solutions with local benefits: B-BBEE level 1 contributor, billing in ZAR, local support and success stories.

Contact us: <https://www.youknow.co.za>

MoyaApp

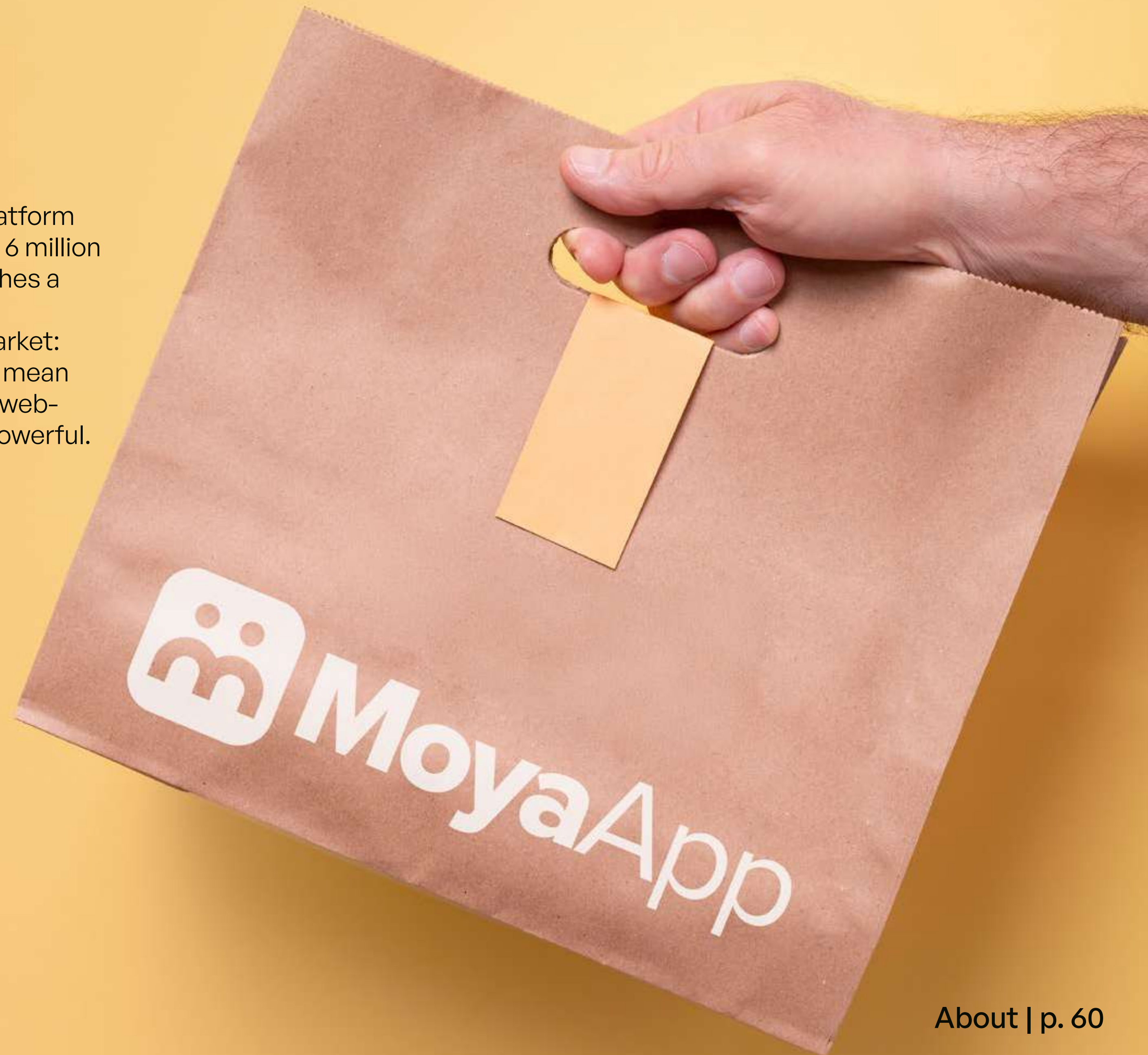
MoyaApp is South Africa's leading chat-based SuperApp, a #datafree platform that brings millions of people together every month. With between 3 and 6 million active users and daily engagement rates exceeding 60%, MoyaApp reaches a broad, mainstream audience that other digital platforms often miss.

We break down the two biggest digital barriers in South Africa's mass market: costly data and limited phone storage. Our #datafree chat and browsing mean users stay connected without worrying about data costs, while over 300 web-based apps in one lightweight hub make entry-level smartphones truly powerful.

Beyond chat, MoyaApp helps South Africans save and earn. Users can make money through our research panel and quiz programs, or stretch their budgets with MoyaApp Rewards and Snap n Save deals on everyday products.

This unique value has made MoyaApp an indispensable platform for businesses, NGOs, and government agencies to communicate, engage, and build lasting connections with a vast, hard-to-reach audience — all in a measurable, impactful way.

Talk to us: <https://moya.app>



A background of a solid red color with several golden-brown french fries scattered across it, some whole and some broken.

2025 Fast Food and QSR Insights

SEARCH, CHATTER AND MASS MARKET CONSUMER BEHAVIOUR

Rogerwilco

 **MoyaApp**

 **YOUKNOW**
TECHNOLOGIES