

# THE COVID-19 PANDEMIC IN SOUTH AFRICA

A glimpse of the story so far

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6 May, 2020

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**GAME CHANGERS**

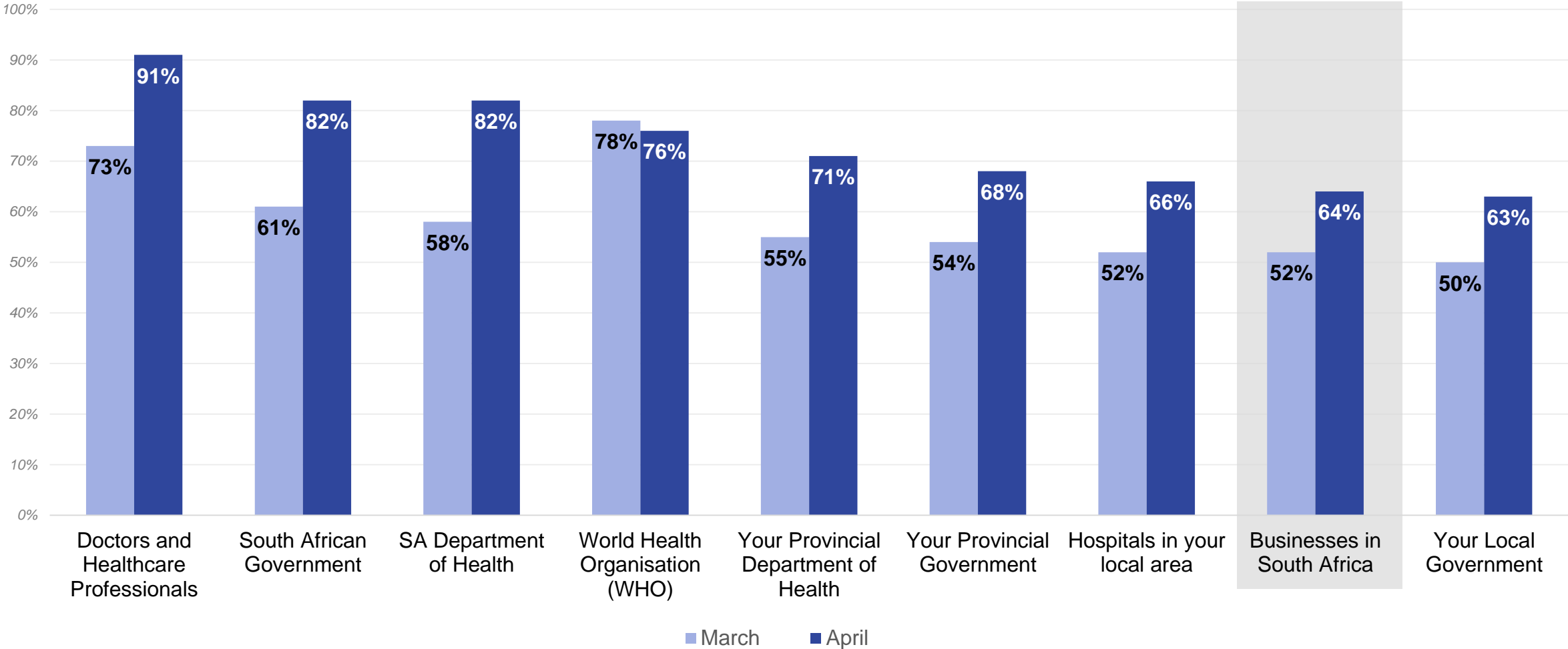


# COVID-19 TRACKER

Looking at confidence in  
institutions and SA coping  
strategies

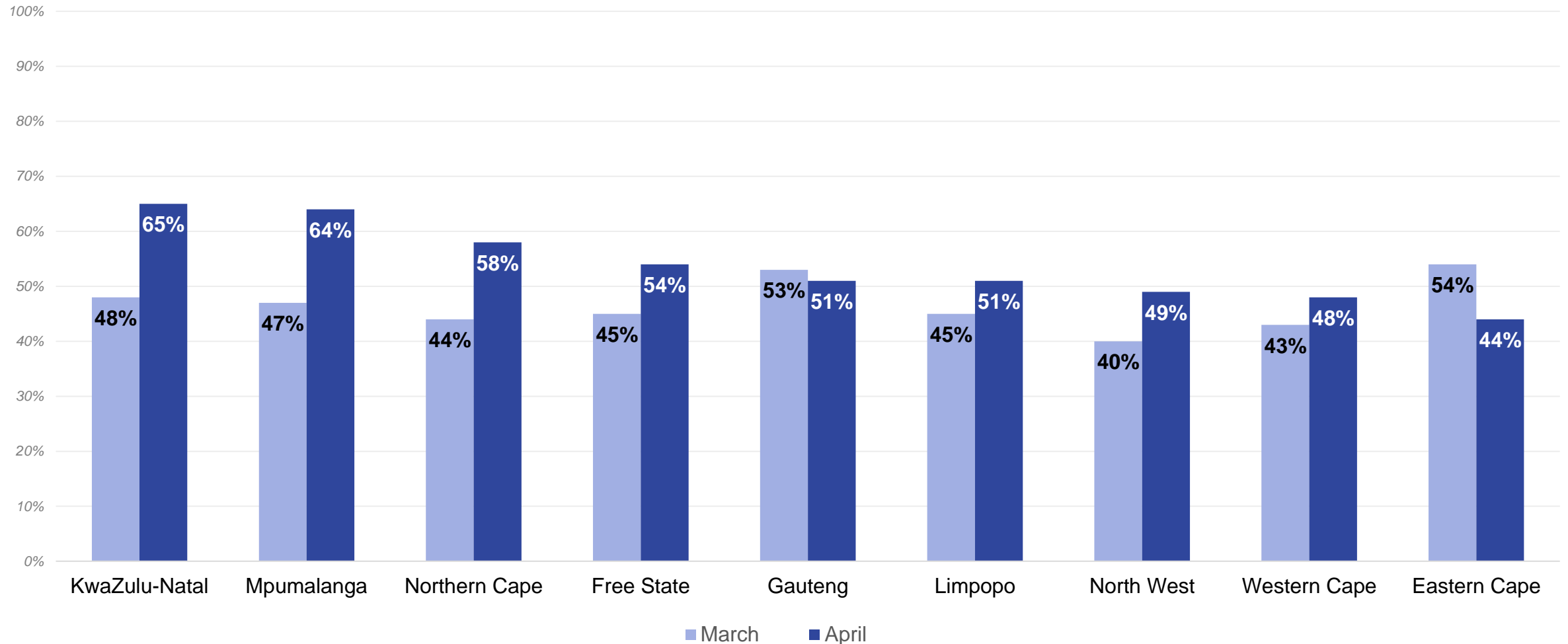
# CONFIDENCE IN ORGANISATIONS/INSTITUTIONS TO CONTAIN THE SPREAD

Confidence is on the rise amongst South Africans, that organisations & institutions can deal with the virus



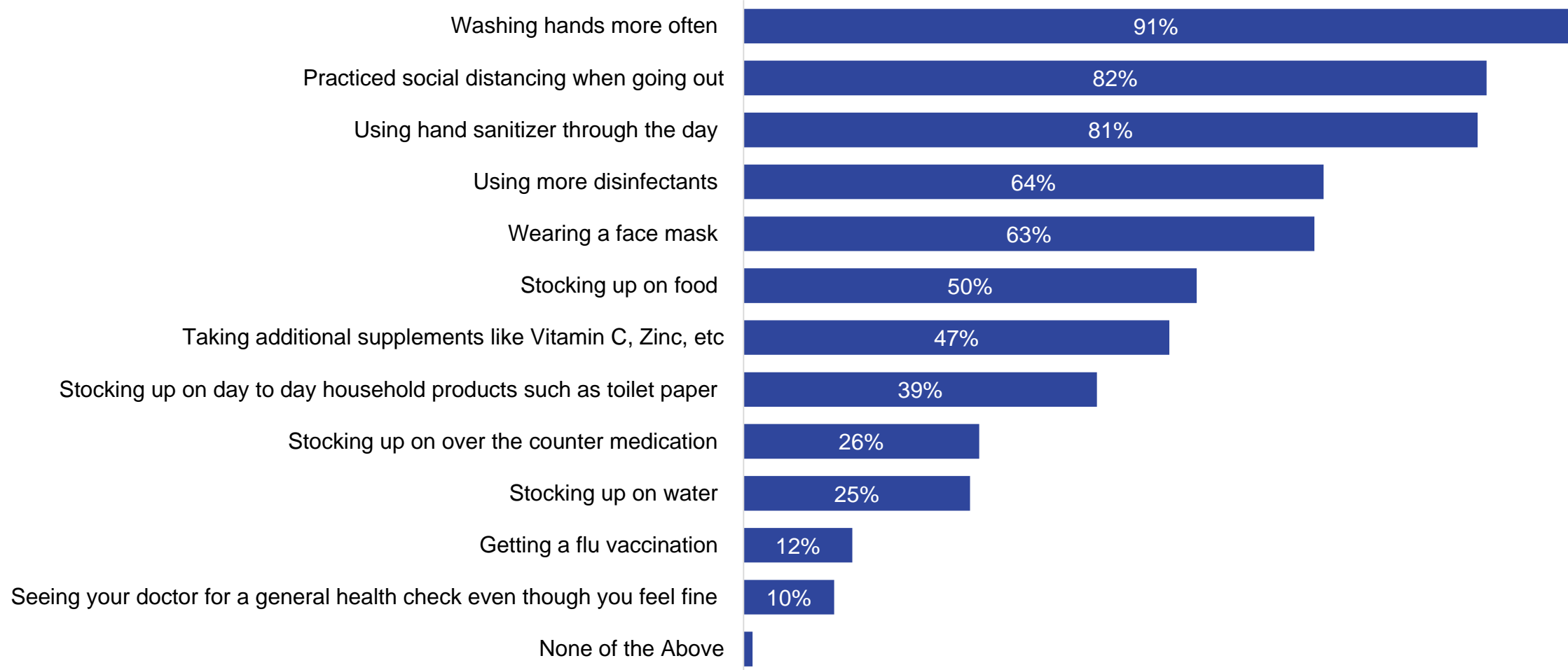
# PERCEIVED LEVEL OF THREAT BY PROVINCE

How high is the level of threat posed by coronavirus to you personally? (Very high / high threat)



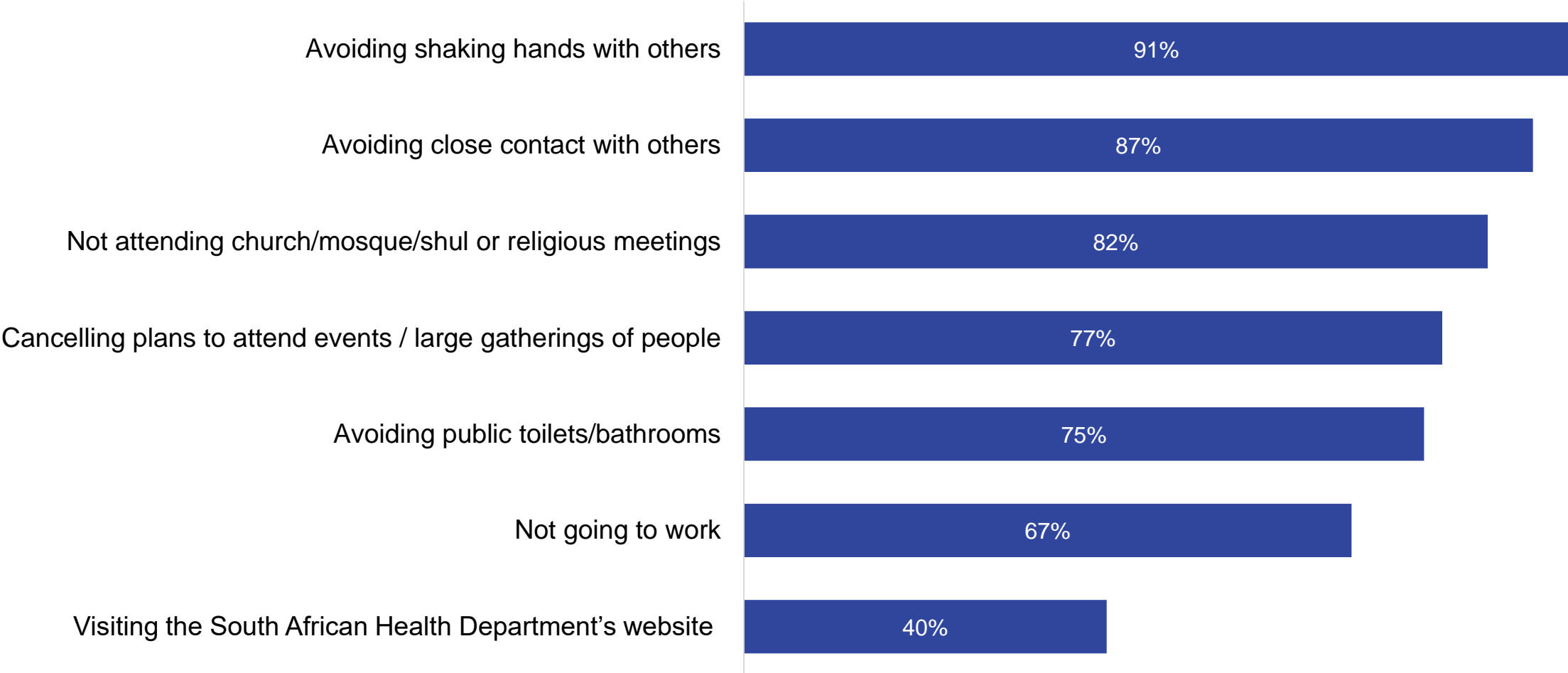
# PERSONAL ACTIONS TO KEEP SAFE

Online South Africans are getting into the habits of washing their hands more often (91%) and social distancing when going out (82%). Wearing a mask when going out is not a trend as yet (63%).



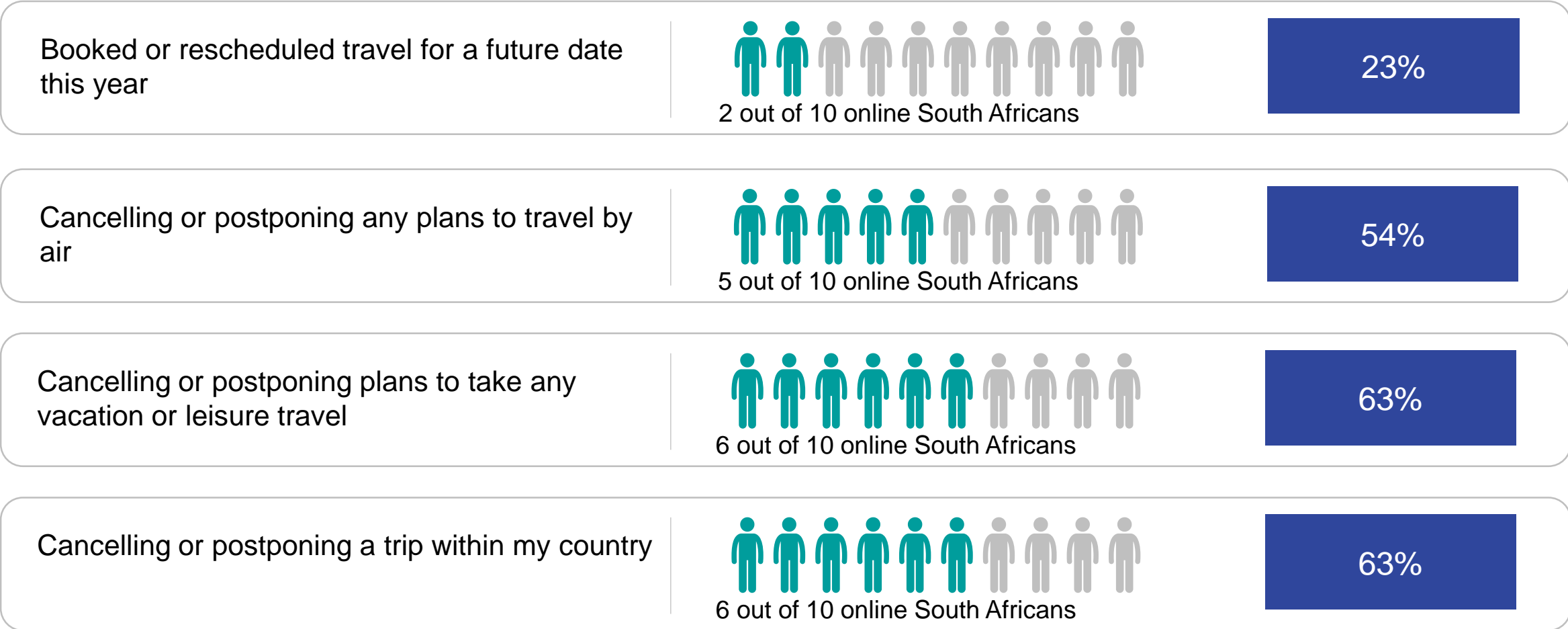
# WE ARE CHANGING WHAT WE DO

Online South Africans are avoiding contact with others (shaking hands 91% and close contact (87%), whilst limiting possible exposure by not attending large gatherings.



# TRAVEL PLANS

Online South Africans are putting their travel plans on the backburner.



# ...AND OVERALL, THERE ARE MARKED CHANGES IN CONSUMER ATTITUDES AND BEHAVIOURS

## BEHAVIOURAL CHANGES

- Less outdoor activities
- Increased consumption of media
- Increased use of social media, but growing trust in “traditional” media
- Brand switches (based on availability)
- Increase in and focus on personal and environmental hygiene
- Increase in house chores and children management
- Surge in online education
- WFH gaining traction

## ATTITUDINAL CHANGES

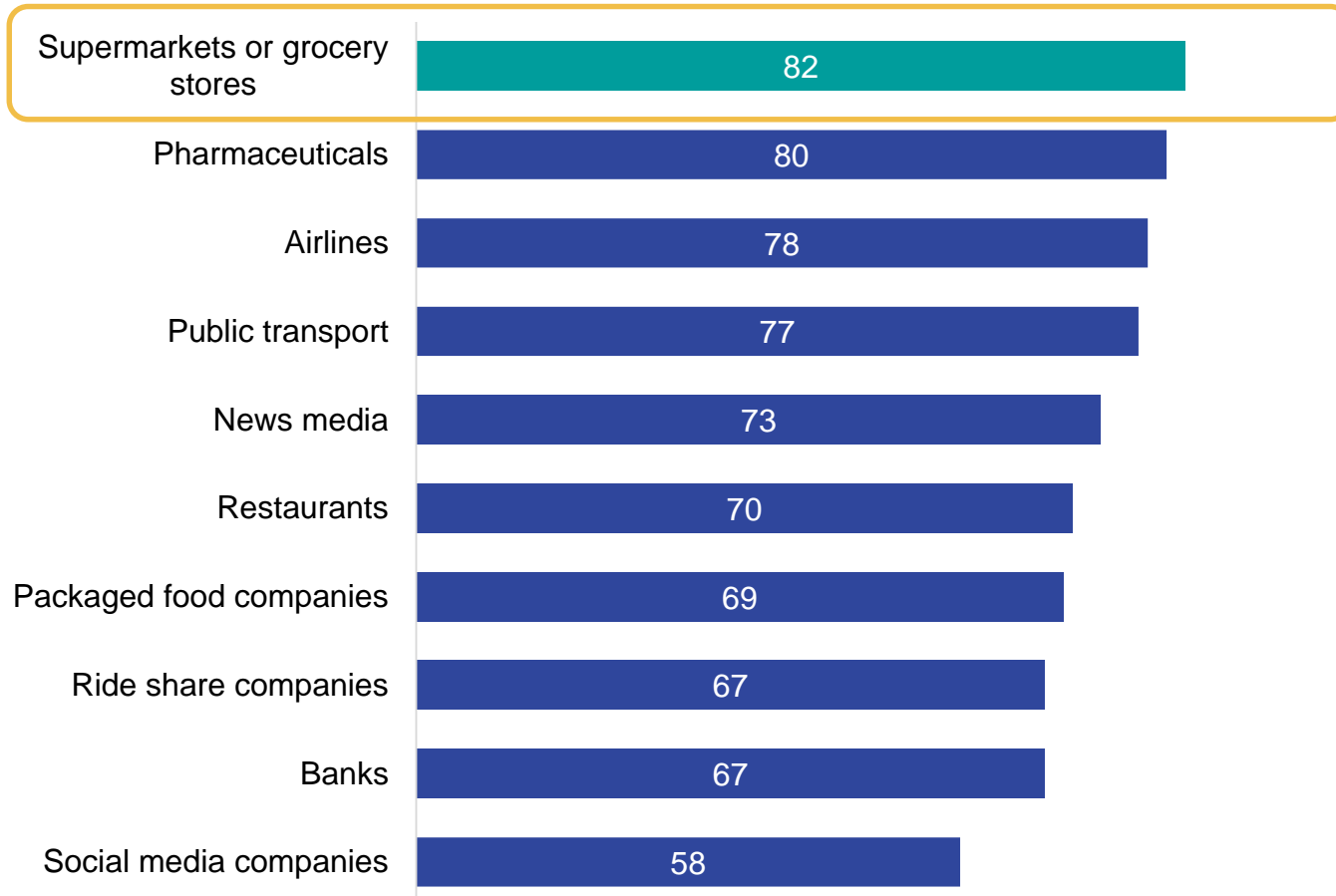
- Appreciation for life and family
- Enhanced consciousness towards
- Health
- Concern/worry about long time effect of pandemic on finances and job security
- Heightened awareness about BMI
- Realisation that the future will be nothing like the past
- Widespread apprehension and uncertainty, but resolve to deal with challenges



# RETAIL AND SHOPPING BEHAVIOUR

# TAKING RESPONSIBILITY IN THE FIGHT AGAINST THE VIRUS

Supermarkets carries a huge responsibility when it come to combating the spread of the COVID-19 virus



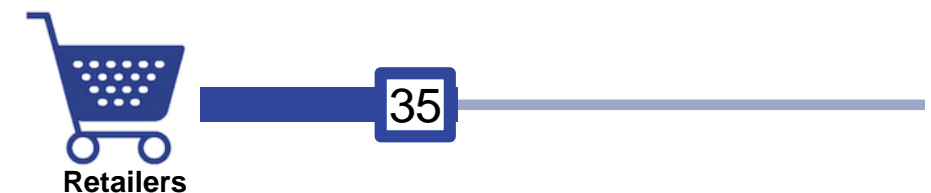
## Customer Reputation (Looking at retailers)

Companies with high reputational equity amongst reported increased levels of brand equity, increased market share and brand loyalty amongst its customers. Having supporting customers during a crisis help to build reputation. 72% of online South Africans agreed that retailers have done enough to protect their customers.



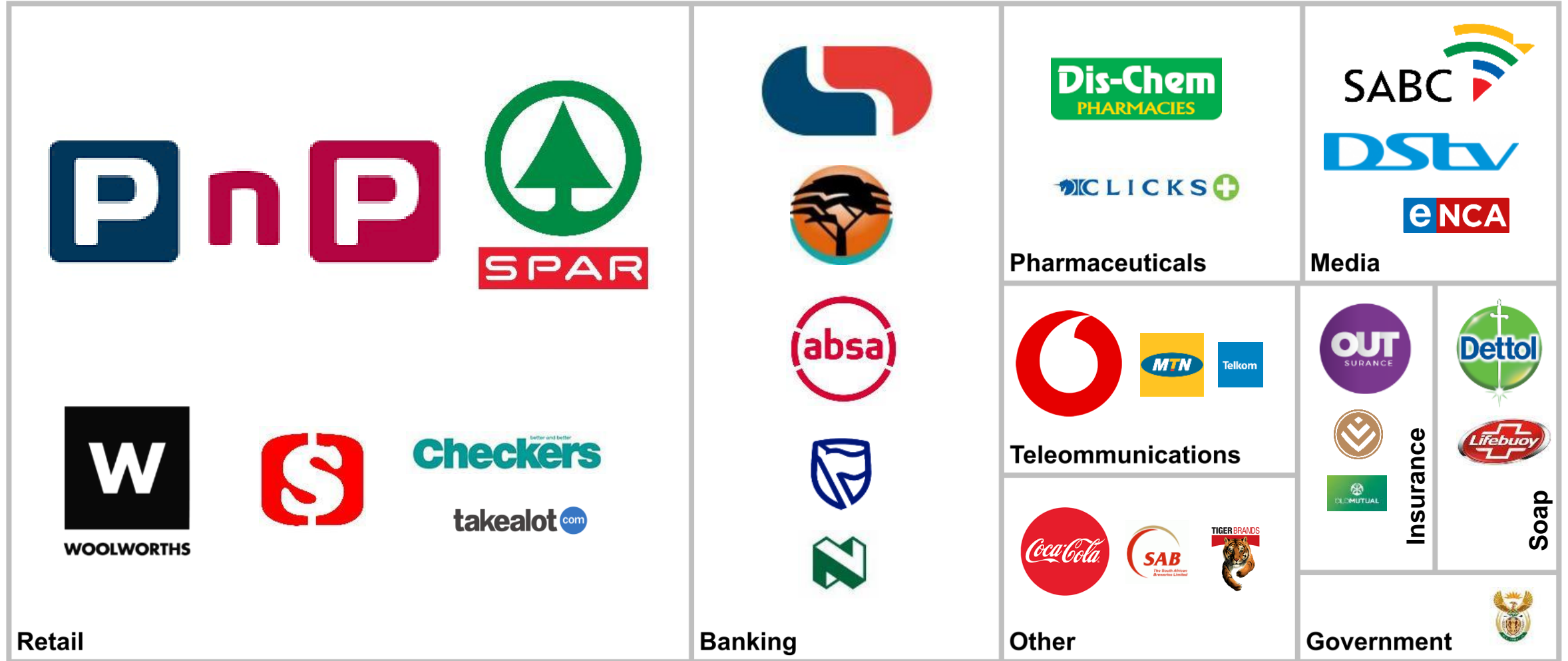
## Building reputation by getting the right amount of information out there

Corporations, businesses and brands have a unique window of opportunity where brands can earn trust and build their reputation by maintaining their presence and delivering relevant value in a fluid period of heightened anxiety and change. 35% of online South Africans agree that retailers managed to get the right amount of information out there.



# RELEVANT COMMUNICATION FROM RETAILERS HELP TO BUILD TRUST AND ENCOURAGE SHOPPER TO VISIT THEIR STORES

Which companies or brands do you think are doing relevant advertising during the lockdown?



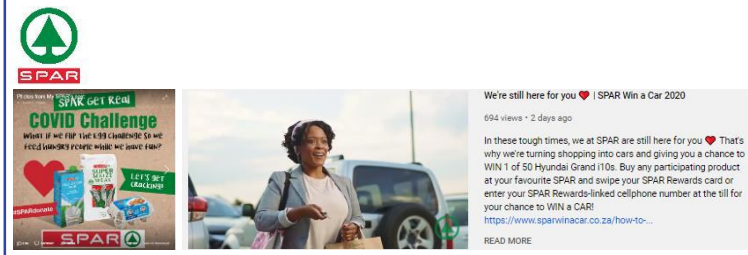
# RETAIL: SHOW OF UNITY AMONGST RETAIL BRANDS AND STRONG INDIVIDUAL MESSAGES OF RELIABILITY



PnP created relevant buzz early on with their 'don't panic buy' message. More recently both PnP and Shoprite are raising funds to feed those in need



[https://www.youtube.com/watch?v=PcG\\_OU1pvUA](https://www.youtube.com/watch?v=PcG_OU1pvUA)



Shoprite Checkers group headlining their affordable uSave stores (& mobile store), to showcase support of those in need, and the checkers 'act for change initiative'

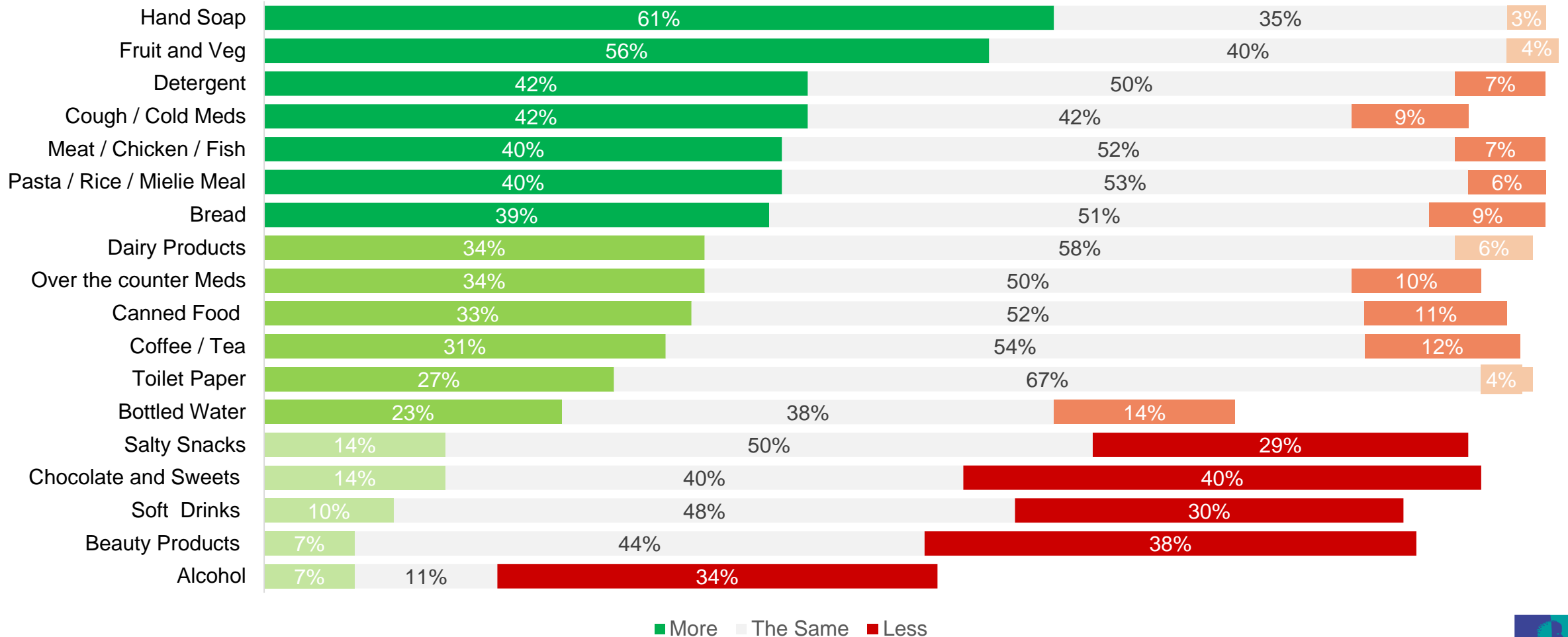


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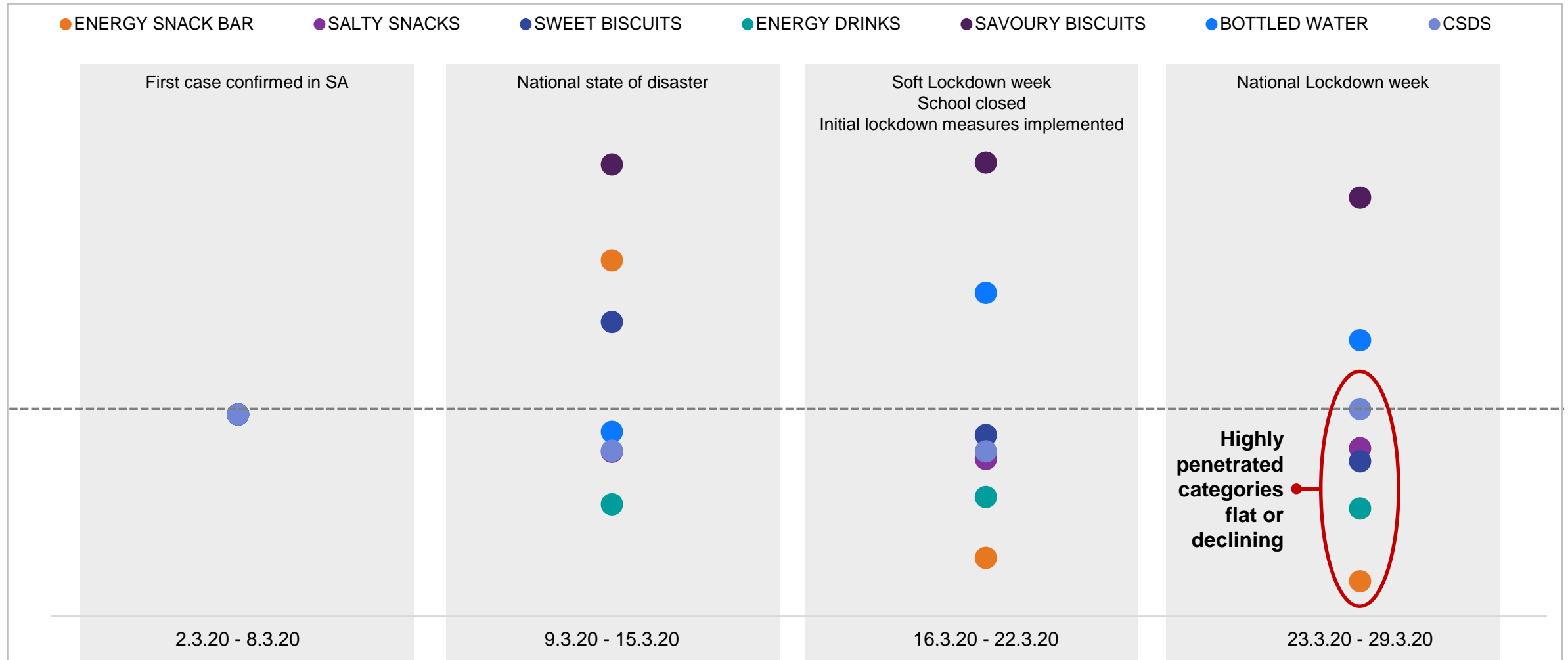
# WHAT IS BEING PURCHASED

Shoppers claim to purchase more sanitation and pharmaceuticals (their lives) and essential goods and less treats / luxury items(their livelihoods)...



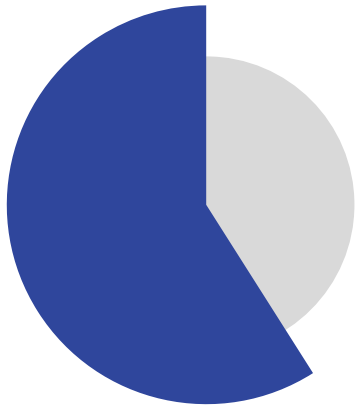
# RATIONALISATION OF SNACKS PURCHASED

Volume of snacks and beverages purchased declines. Reduced purchases on high OOH categories



# IN-STORE TO ONLINE

The shift from in-store to online shopping tends to be for toiletries, sanitation products and food & beverages



**59%**

**TOILETRIES**



**57%**

**SANITATION  
PRODUCTS**



**57%**

**FOOD & BEVERAGES**



**39%**

**OTHER PERSONAL  
CARE PRODUCTS**

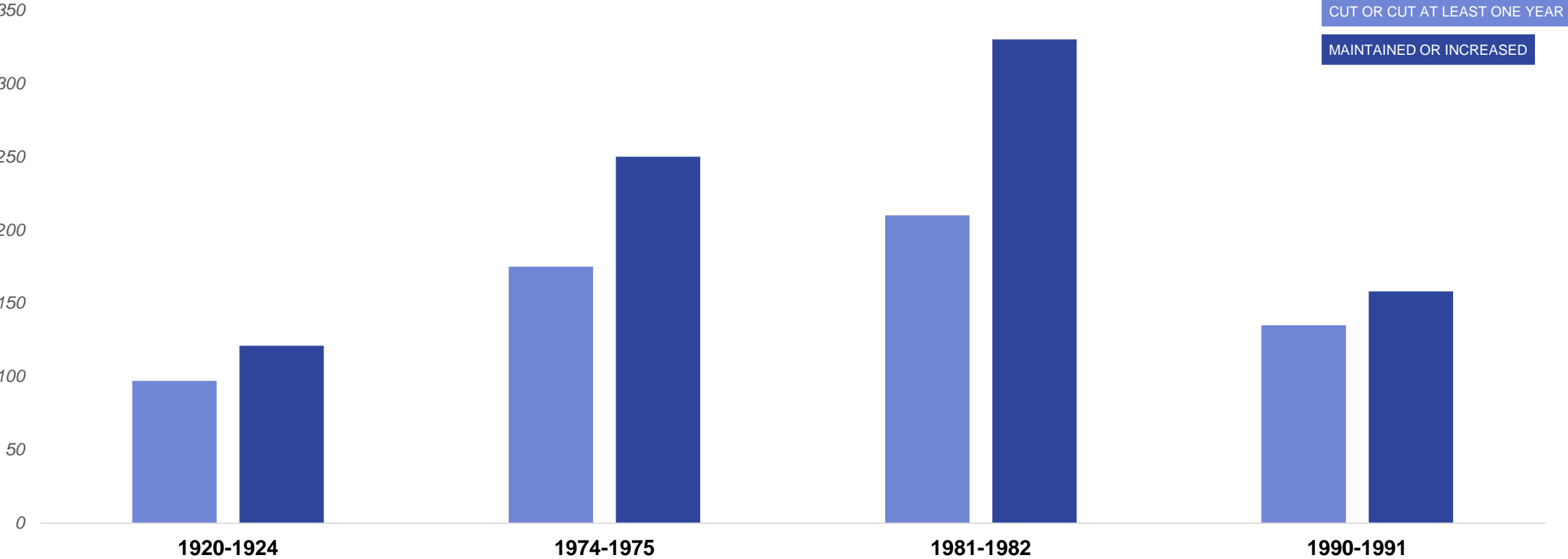
# BRANDS IN LOCKDOWN

The creative fight back

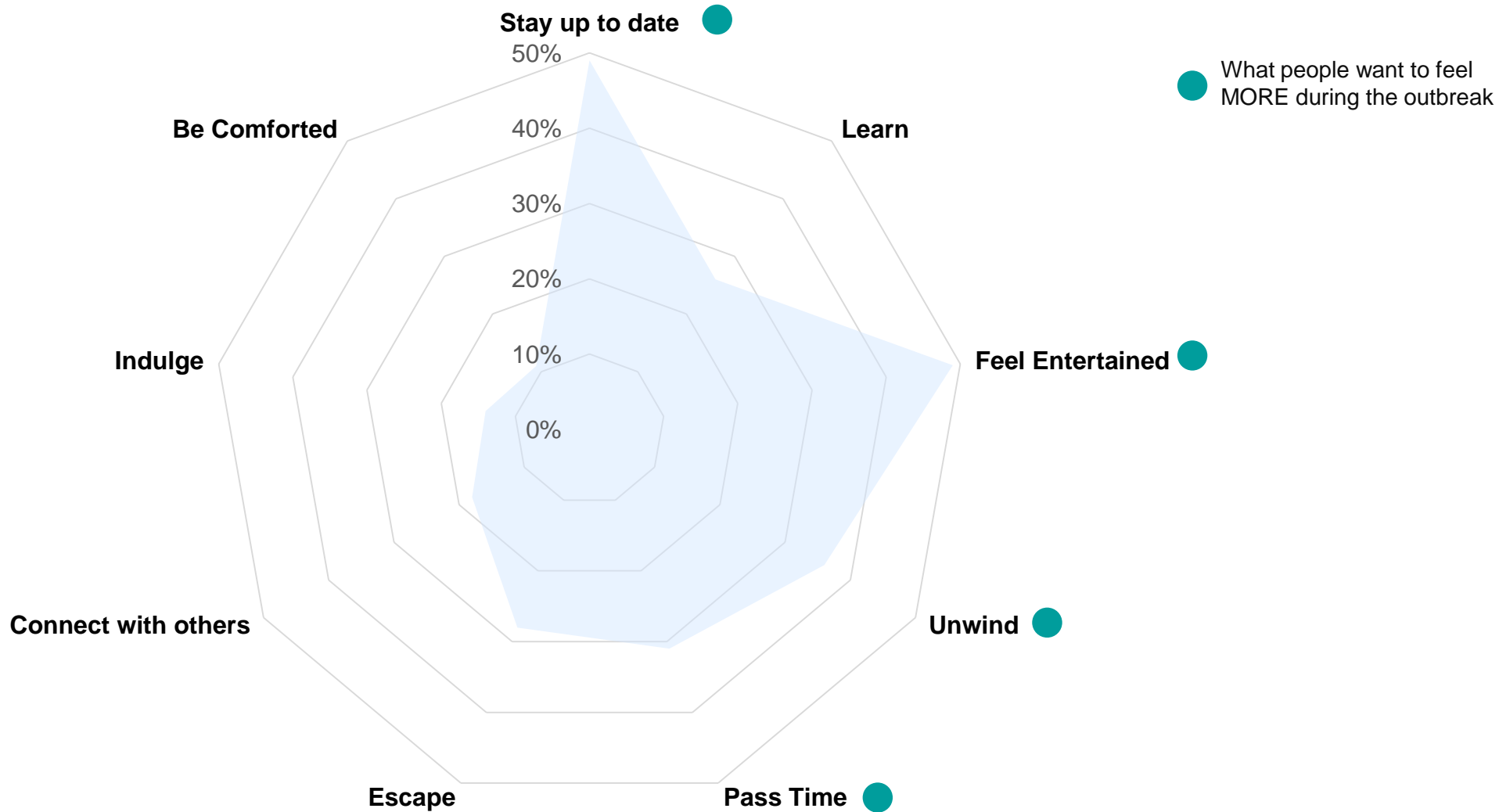


# COMPANIES THAT MAINTAIN OR INCREASE ADVERTISING SPEND DURING RECESSIONS TEND TO SEE HIGHER SALES

Across all major recessions, advertisers who maintain or increase their advertising spend see higher sales increases in the last year of the period than those that do not



# PEOPLE WANT ENTERTAINMENT AND ESCAPISM DURING THE CRISIS, AS WELL AS UP-TO-DATE INFORMATION...

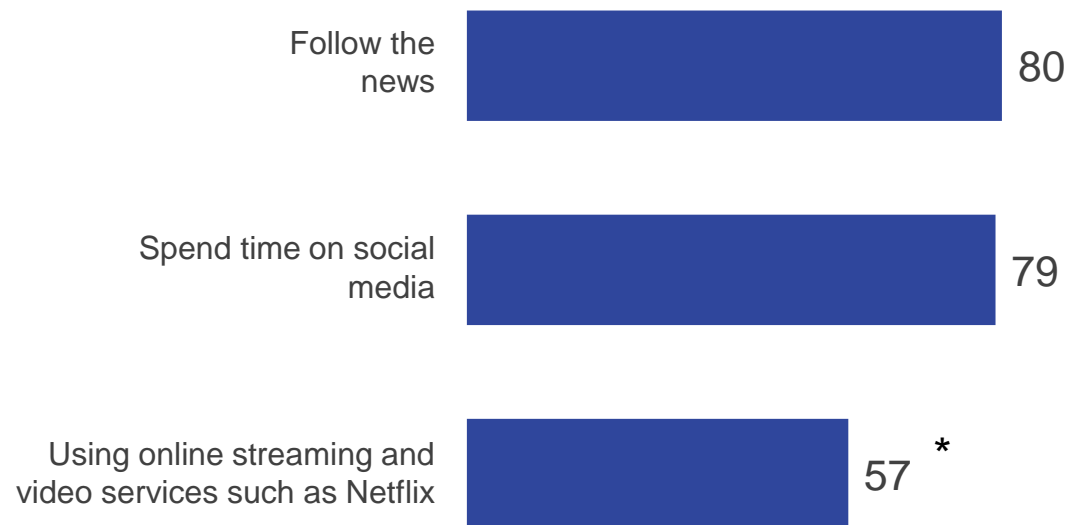


# ...THEY ARE VIEWING DIFFERENT CONTENT AND MEDIA IS CONSUMED DIFFERENTLY, ENGENDERING ONLINE FIRSTS FOR SOME SOUTH AFRICANS

Would you say you are doing each of the following more frequently or less frequently compared to one month ago?



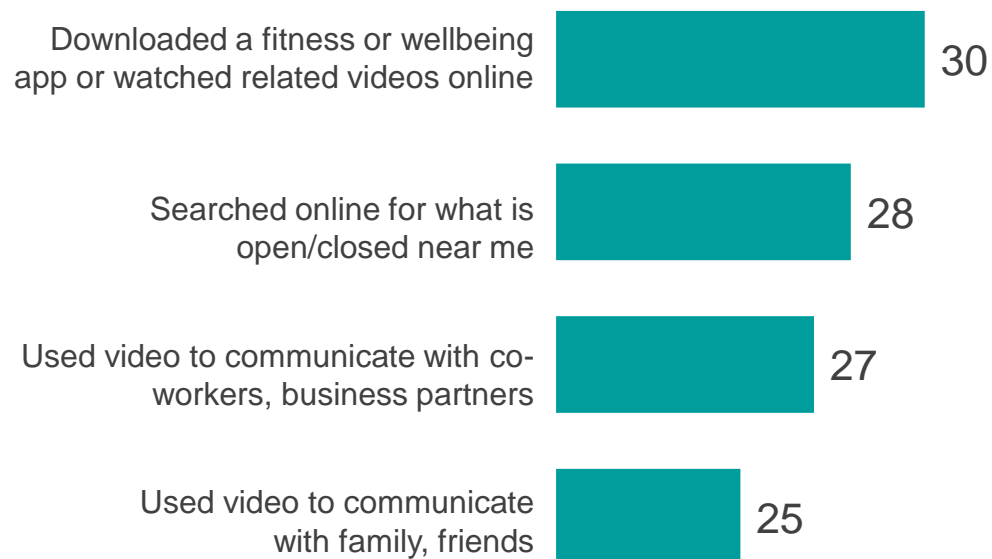
## % More frequently



Of these activities that you have done, which if any did you do for the first time ever?

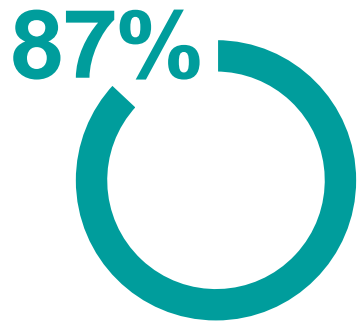


## % 1<sup>st</sup> time



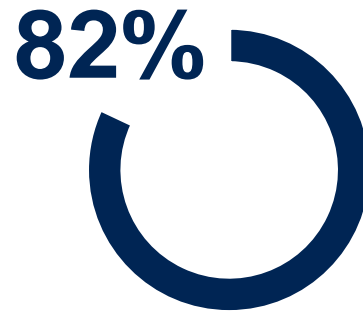
# BRAND EXPECTATIONS

**PEOPLE EXPECT BRANDS TO HELP them DURING THIS CHALLENGING TIME...**



Strongly agree / agree (T2B)

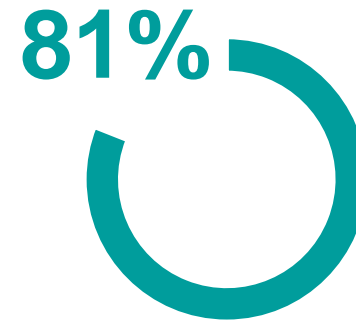
**I am interested in hearing from brands that can help me navigate the crisis**



Strongly agree / agree (T2B)

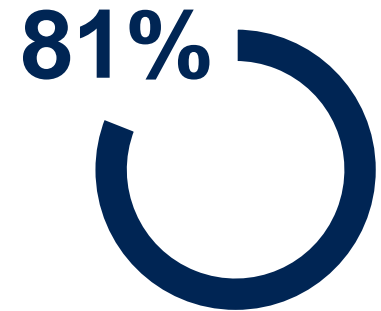
**Companies have a social responsibility to offer aid during the Coronavirus**

**AND ARE OPEN TO SEE ADVERTISING FROM THEM**



Strongly agree / agree (T2B)

**Now more than ever it is important to hear from brands to know what they stand for**



Strongly agree / agree (T2B)

**I want to continue to hear from brands and companies on what they have to offer**

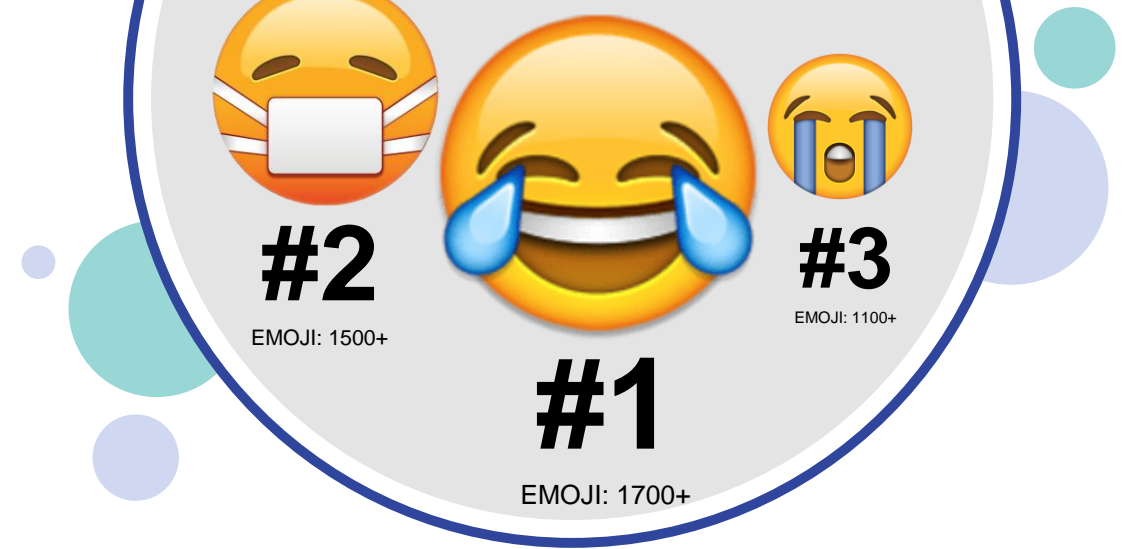
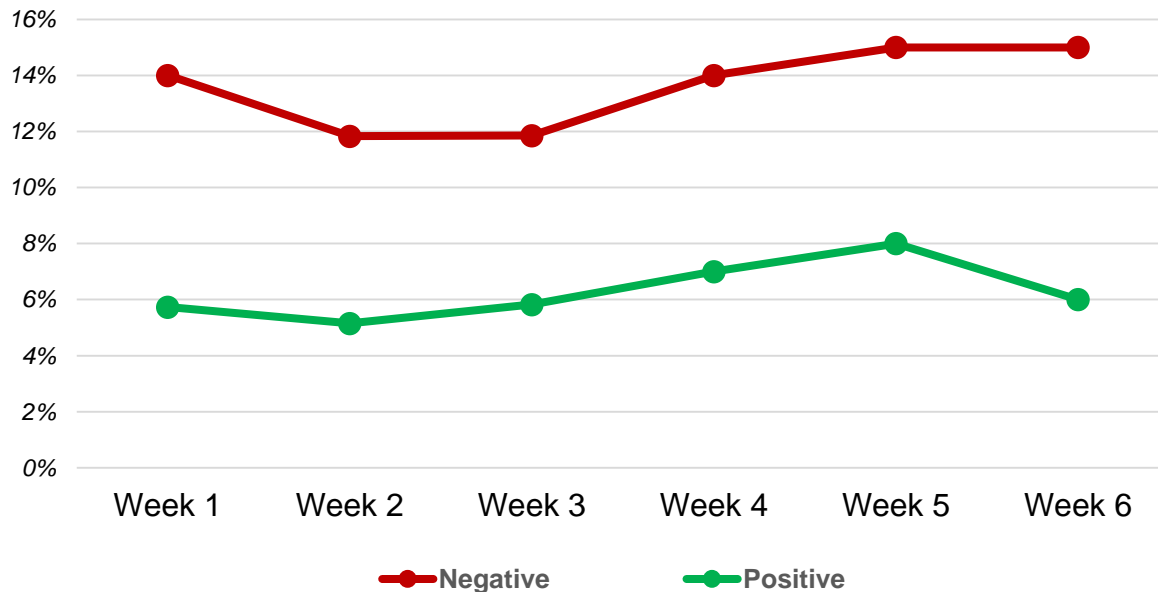
# COVID-19 ON SOCIAL MEDIA

Week 6 of Lockdown

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## Week 6 of lockdown

The sentiment around the lockdown is getting increasingly negative, with positive sentiment steadily decreasing. South Africans are becoming increasingly worried about job losses caused by the lockdown, leading to the negative sentiment. The words related to lockdown are mainly about help & support.



### Week 6 of SA Lockdown

Related words include “help”, “positive”, and “support”

Total Mentions

**9.6K**

Total Interactions

**259.9K**

Number of publishers

**2.4K**

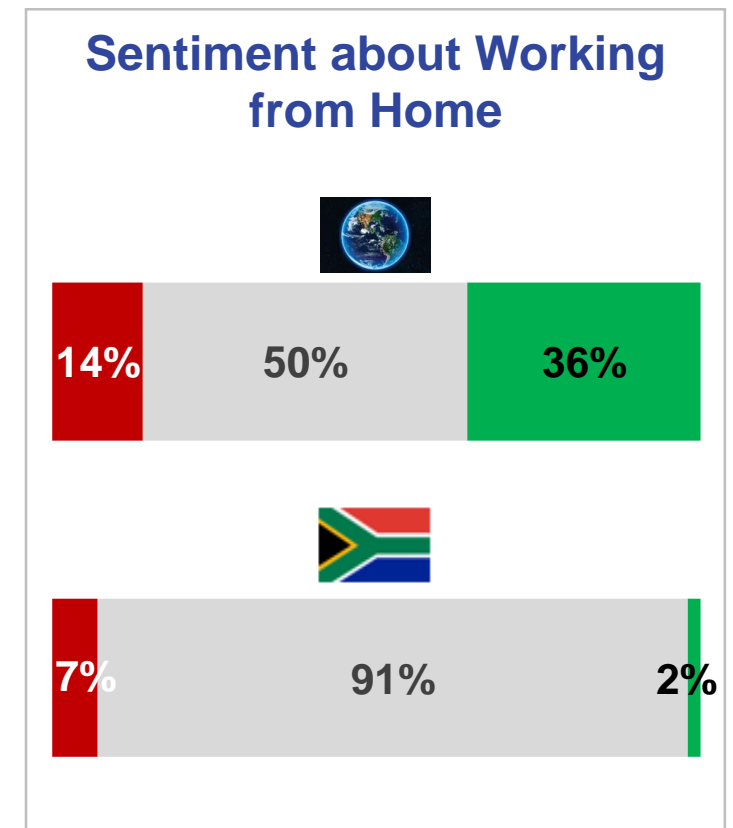
Potential Reach

**536.7M**

# SOUTH AFRICA IS ONE OF THE TOP COUNTRIES GLOBALLY TALKING ABOUT REOPENING

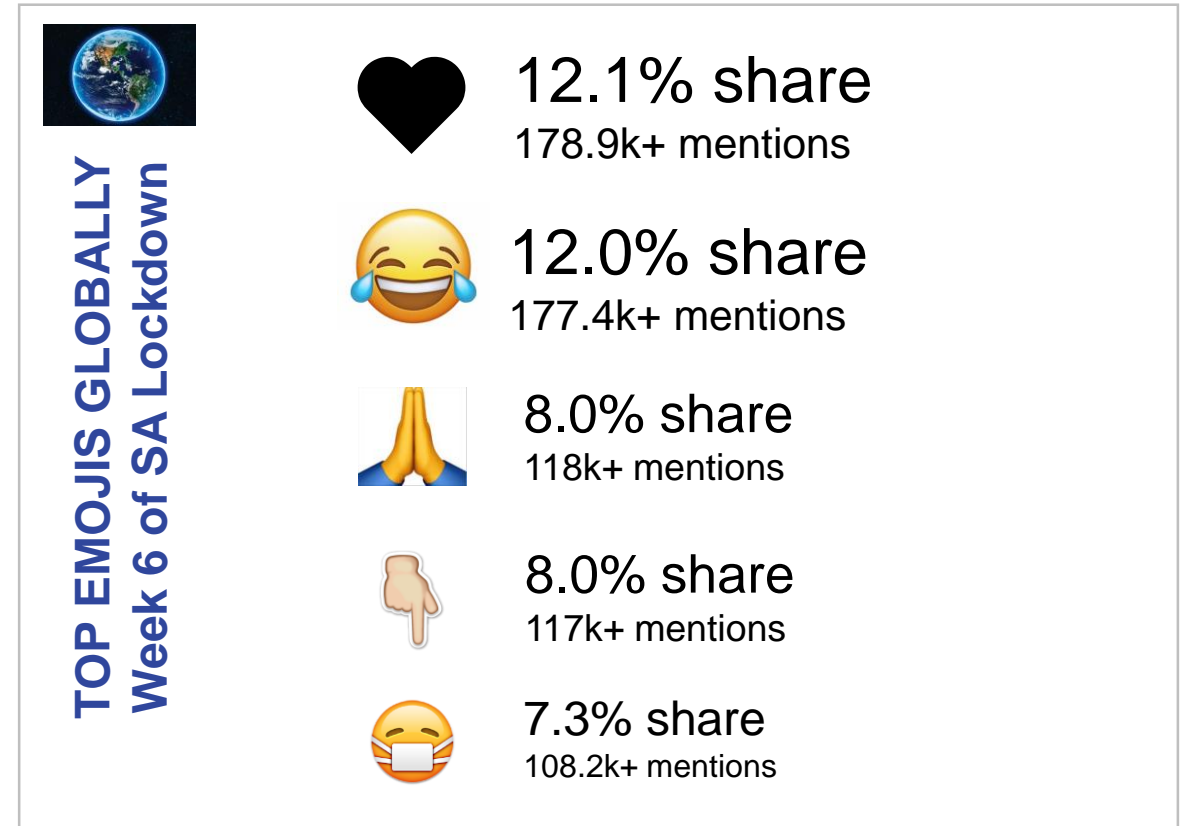
Many South Africans want the country to reopen, but also, there are divided opinions as to whether schools should reopen. With regards to working from home, there is a big gap between south Africa and the world, with people globally generally having a very positive sentiment towards working from home, whereas south Africans don't share this sentiment (largely negative). This could be due to the majority of south Africa not being adequately equipped to work from home.

		Total Volume	% of conversations about reopening
United States	134794	3855156	3.5%
Canada	15923	496436	3.2%
United Kingdom	13645	1124795	1.2%
Australia	5889	247183	2.4%
India	5560	735819	0.8%
<b>South Africa</b>	<b>1243</b>	<b>107872</b>	<b>1.2%</b>
Ireland	1235	70566	1.8%
Germany	1097	288481	0.4%
Thailand	1021	46574	2.2%
Panama	1001	43342	2.3%



# EMOJI USAGE IN SOUTH AFRICA VS GLOBALLY

Mask wearing and laughing (21% in RSA vs 12% globally) emoji's are more popular in SA, than globally. Globally, more supportive emojis are shown, with the heart and praying hands accounting for a fifth of emojis used. SOUTH AFRICAN TWITTER IS KNOWN FOR THEIR 'MEME' CREATION AND entertaining THREADS, poking fun at serious situations.





# A QUALITATIVE VIEW

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We attempted to converse with everyday South Africans from the most critical consumer segments. In attempts to understand and underline similarities and highlight differences as our citizens navigate turbulent waters. Included:



## **BLUE COLLAR STRUGGLERS:**

Blue-collar workers with low disposable income and very little savings. Often household of few earners responsible for large extended families. Low levels of formal education. Mostly live in townships, poor suburbs and rural areas. Strong traditional and conservative values.

## **YOUNG ROCKETS:**

Young, upwardly mobile demographic. Optimistic, outgoing and confident. Mostly found in urban metro centers. High school and tertiary educated. Professionals at the beginning of a career path. Self focused and driven by aspiration, achievement and social recognition.

## **SUBURBAN PROFESSIONALS:**

Settled, down-to-earth and content. Living in upmarket suburbs. Often established careers and entrepreneurial jobs. Family and contentment focused. Driven by quality of life and having a balanced life. Access to discretionary spending.

# QUALITATIVE VIEW FROM 3 SOUTH AFRICANS ON LOCKDOWN

Themes & Segments	BLUE COLLAR STRUGGLERS	YOUNG ROCKET	SUBURBAN PROFESSIONAL
<b>View of Government</b>	<p><b>Resentment</b></p> <ul style="list-style-type: none"> <li>• Hungry, frustrated</li> <li>• Feeling resentful of SA government</li> </ul>	<p><b>Disappointment</b></p> <ul style="list-style-type: none"> <li>• Inefficient government structures, and ministers need to step up</li> <li>• Lack of information</li> <li>• Unclear on the impact</li> <li>• Frustrated with ban on alcohol and cigarettes</li> </ul>	<p><b>Immense pride</b></p> <ul style="list-style-type: none"> <li>• As a South African</li> <li>• Proud of the Government's swift action</li> </ul>
<b>Shopping Behaviour</b>	<p><b>Cash strapped</b></p> <ul style="list-style-type: none"> <li>• Empty cupboards</li> <li>• Transport limited</li> <li>• Forced to shop at bigger, more expensive retailers</li> <li>• Long queues in malls</li> <li>• Brands are not making an impression</li> </ul>	<p><b>Efficient shopping</b></p> <ul style="list-style-type: none"> <li>• Would not join long queues before lockdown</li> <li>• Normal shopping behaviour</li> <li>• Only bought more alcohol and meat</li> <li>• Bought things consumer believed would increase in price (seen as a saving / planning)</li> <li>• Netflix praised for range and agility</li> <li>• Love for brands who use humour to lift the mood</li> </ul>	<p><b>Stockpiling before lockdown</b></p> <ul style="list-style-type: none"> <li>• Purchasing behaviour focussed on essentials</li> <li>• Impressed with retailers like PnP, WW &amp; Checkers</li> <li>• Relationships have been formed with local store managers</li> <li>• Favourite brand was out of stock – swapped to another cheaper brand, won't go back to previous brand (quite proud to have found a cheaper alternative)</li> </ul>
<b>The New Normal</b>	<p><b>Big life lessons</b></p> <ul style="list-style-type: none"> <li>• Desperate to go back to work</li> <li>• Big lesson learnt – the need to save for unforeseen events becomes crucial</li> <li>• Likely to connect in smaller groups focussed on just hanging out</li> </ul>	<p><b>Life as we knew it</b></p> <ul style="list-style-type: none"> <li>• First stop = bottle store</li> <li>• Keen to see friends, go out, mingle</li> <li>• Full-on three day celebration</li> <li>• Already planning a big party after lockdown</li> <li>• Deleting WhatsApp tired of the C-19 messages</li> </ul>	<p><b>Proceed with extreme caution</b></p> <ul style="list-style-type: none"> <li>• Life will never be the same</li> <li>• Planned holidays and new vehicles are no longer a priority</li> <li>• Unlikely to go back to large public gatherings</li> <li>• Not keen on restaurants</li> </ul>

# CONNECT WITH IPSOS TO GAIN UNIQUE INSIGHTS

## Syndicated Study: Covid-19 Tracker

**Ezethu Mandelize**

ezethu.mandelize@ipsos.com  
074 617 8023

## Syndicated Study: Retail and Shopping Behaviour

**Zibusiso Ngulube**

zibusiso.ngulube@ipsos.com  
082 808 2490

## Brands in Lockdown

**Michele Vrdoljak**

michele.vrdoljak@ipsos.com  
061 465 5856

## Qualitative Insights

**Maree Fouche**

maree.fouche@ipsos.com  
082 379 4497

## Covid-19 on Social Media

**Stephanie Smith**

stephanie.smith@ipsos.com  
082 850 0167

## Corporate Reputation and Crisis Communication

**Stella Fleetwood**

stella.fleetwood@ipsos.com  
083 489 0758

## Syndicated Study: SME's

**Elzette Correia**

elzette.correia@ipsos.com  
078 272 9222

## Syndicated Study: Mzansi Roars

**Samantha Payne**

samantha.payne@ipsos.com  
084 400 8888