

SOUTH AFRICA: BETWEEN A ROCK AND A HARD PLACE

**The tension between the economic downturn
and the fear of the Covid-19 pandemic**

Ipsos South Africa

7 August, 2020

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GAME CHANGERS



THE STORY SO FAR...

1



March '20

Covid-19 seen as an economic rather than a health crisis

2



April '20

The Lockdown will last longer than 3 weeks!

3



May '20

Reality dawns: our lives are changing

4



June '20

Uncertainty and confusion; job losses

5



July '20

Getting to terms: we are in this for the long haul

6

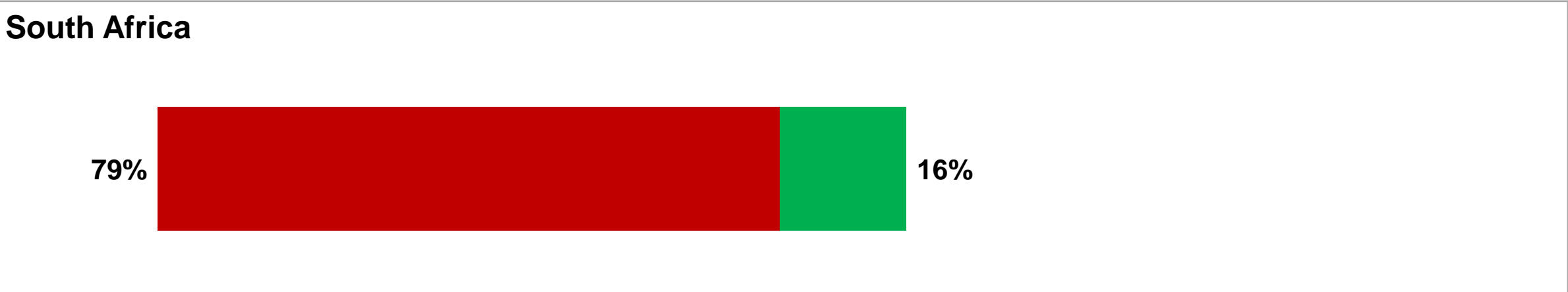
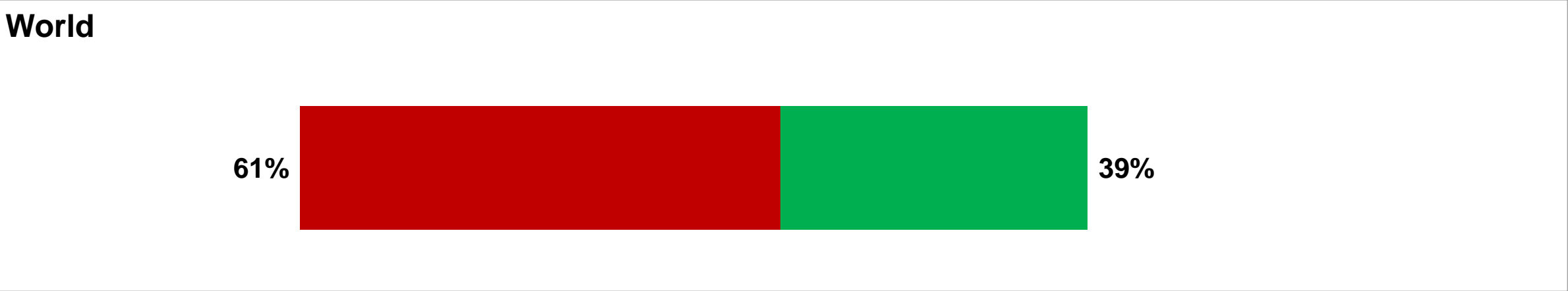


August '20

Dealing with corruption?

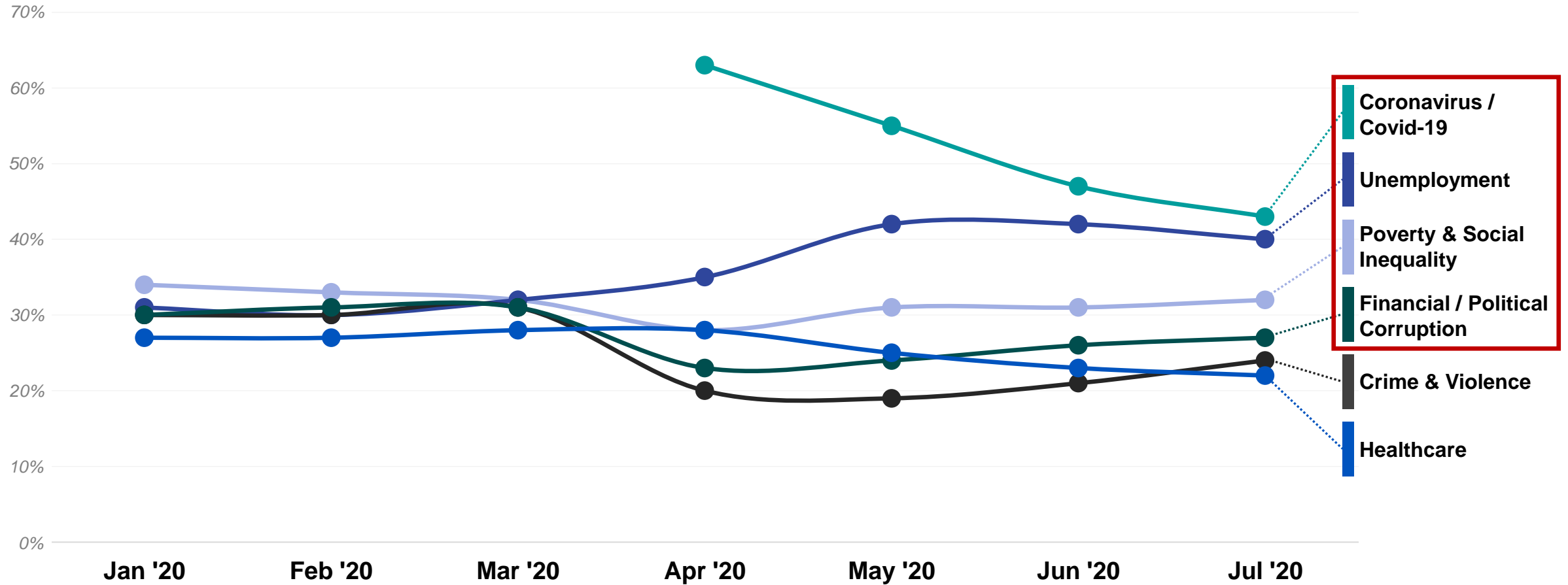
THE WORLD IS HEADING IN THE WRONG DIRECTION

61% globally think the world is heading in the wrong direction, with 79% of South Africans thinking the country is heading in the wrong direction



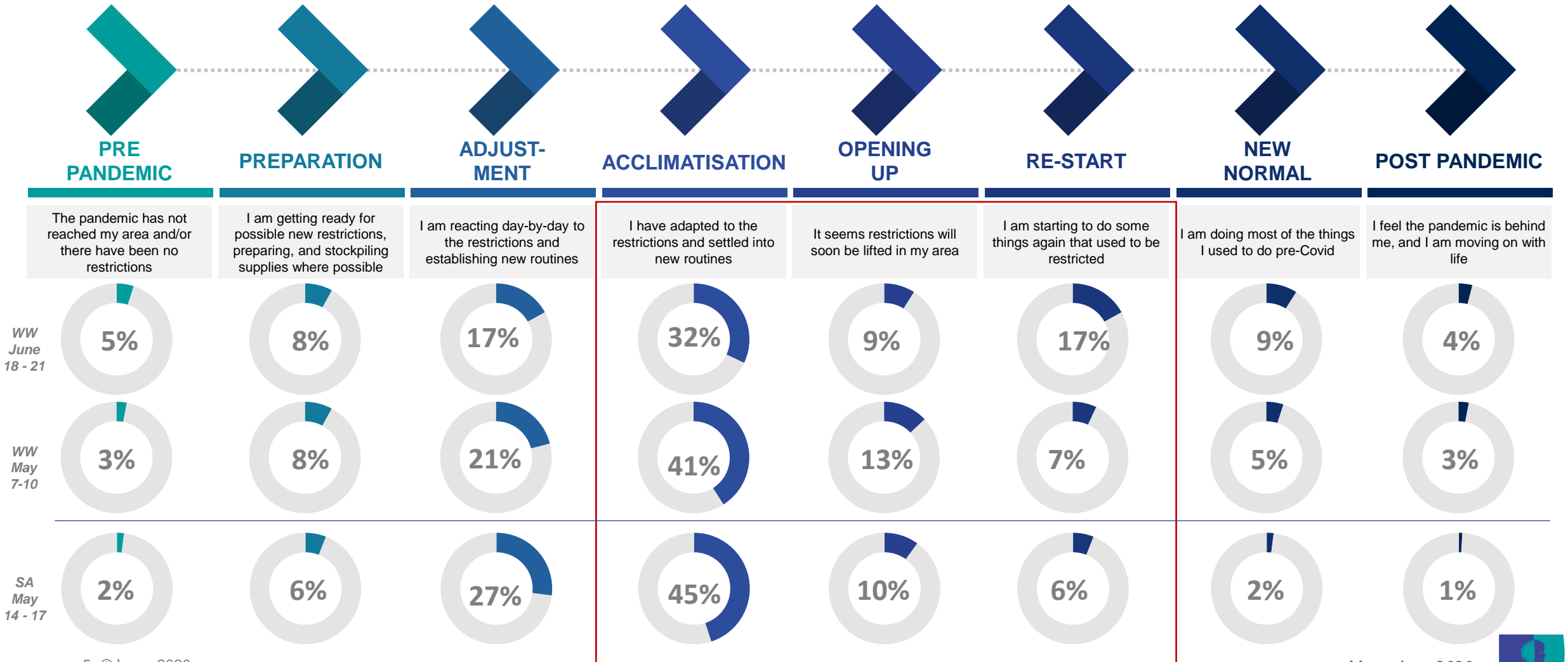
...AS GLOBALLY, THERE ARE MANY CONCERNS

Covid-19 is becoming less of a threat - there are now more serious concerns



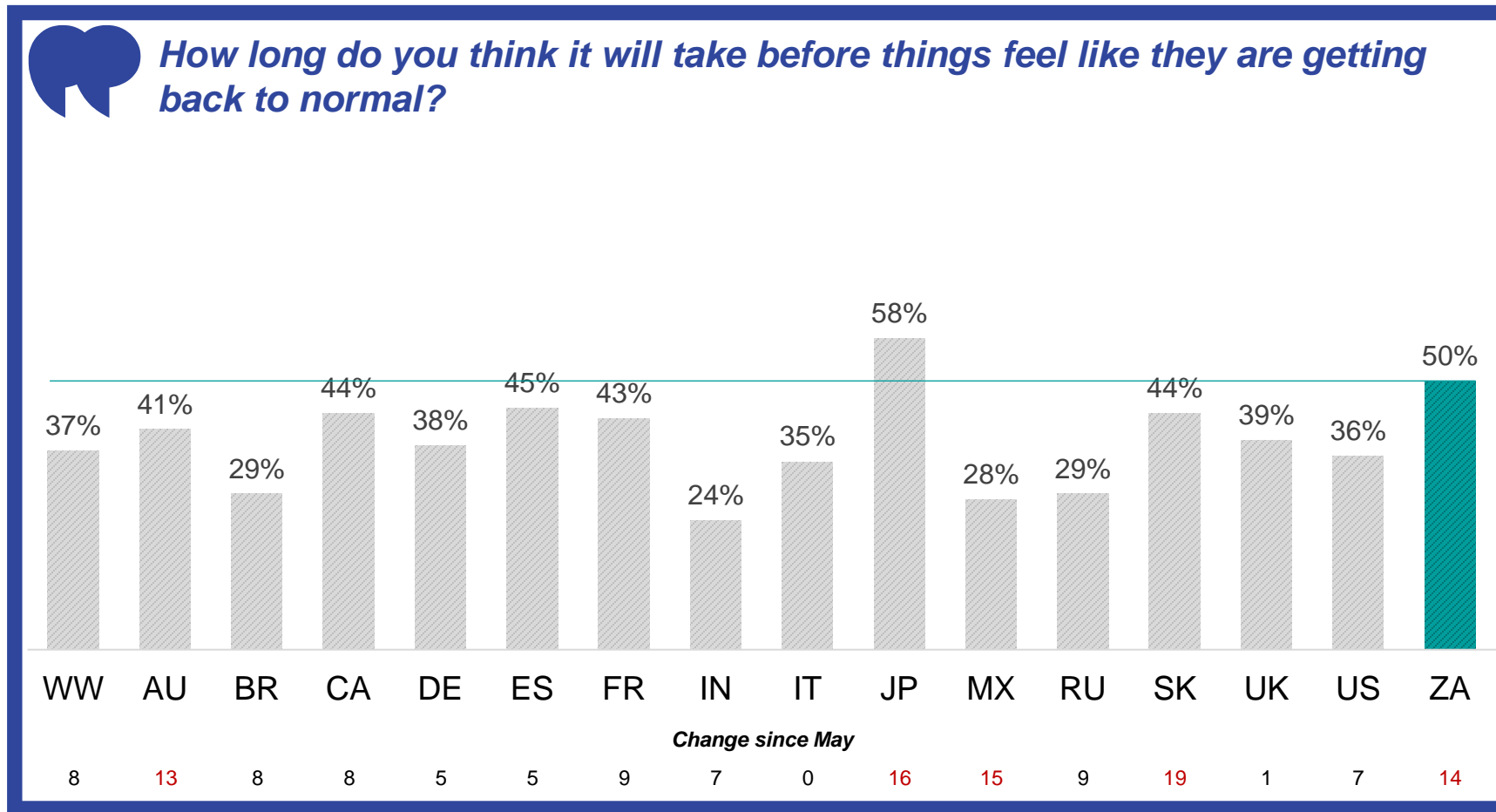
WE CONTINUE THE GRADUAL MARCH TO RE-ENTRY...

“There are often several phases or stages that people go through when times are hard. Which one of the following phases do you feel best describes your current situation?”



BUT RETURNING TO NORMAL IS TAKING INORDINATELY LONG

There is a significant increase in nearly all countries that a return to normal will be at least a year.

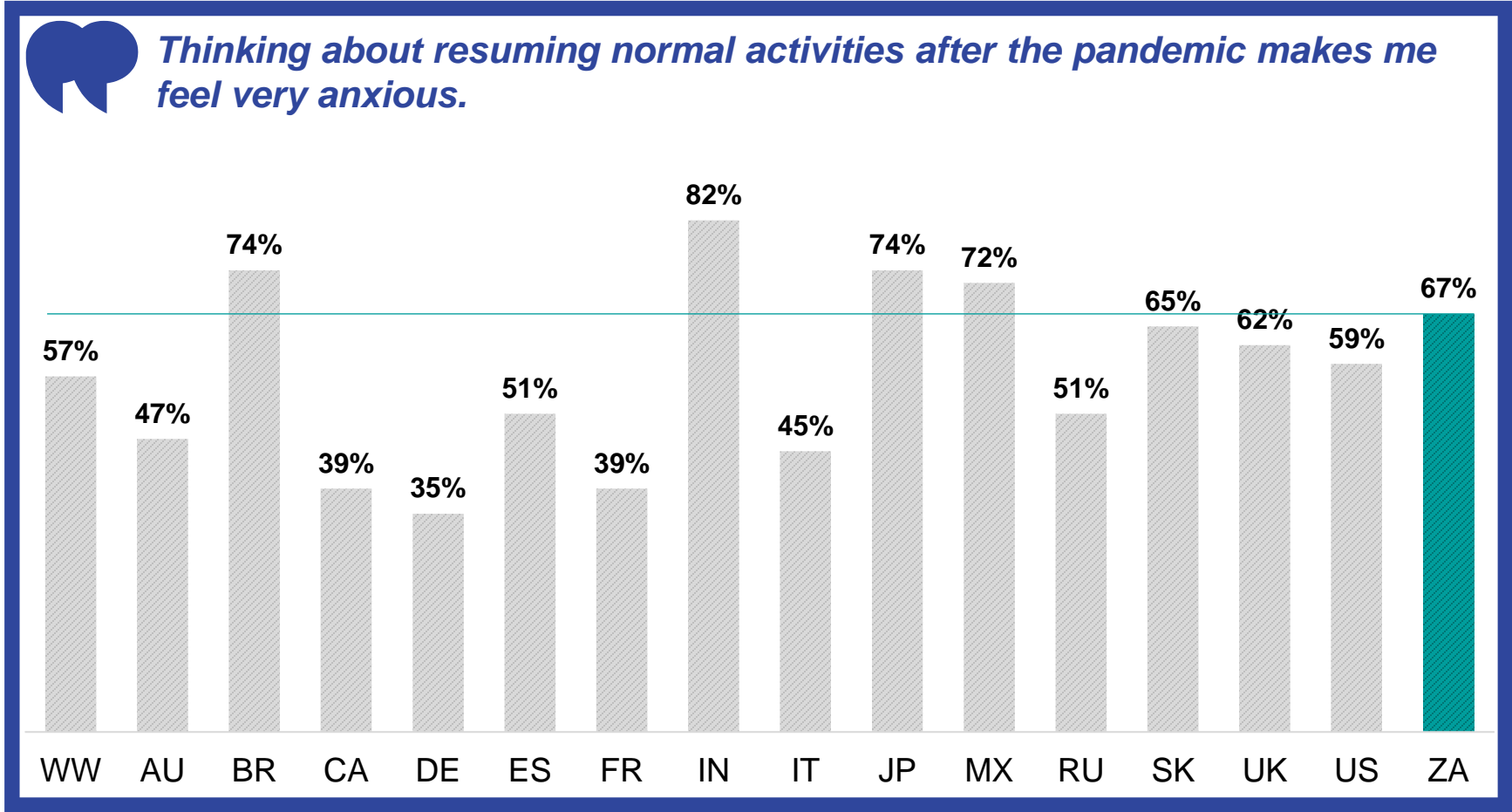


In March, South Africans thought the Coronavirus would be a thing of the past by June...

% 1-2 years & 2 years or more

THAT DOESN'T MEAN WE'RE COMFORTABLE WITH IT

Anxiety about resuming normal activities is particularly high in India, Brazil, Japan, Mexico and South Africa

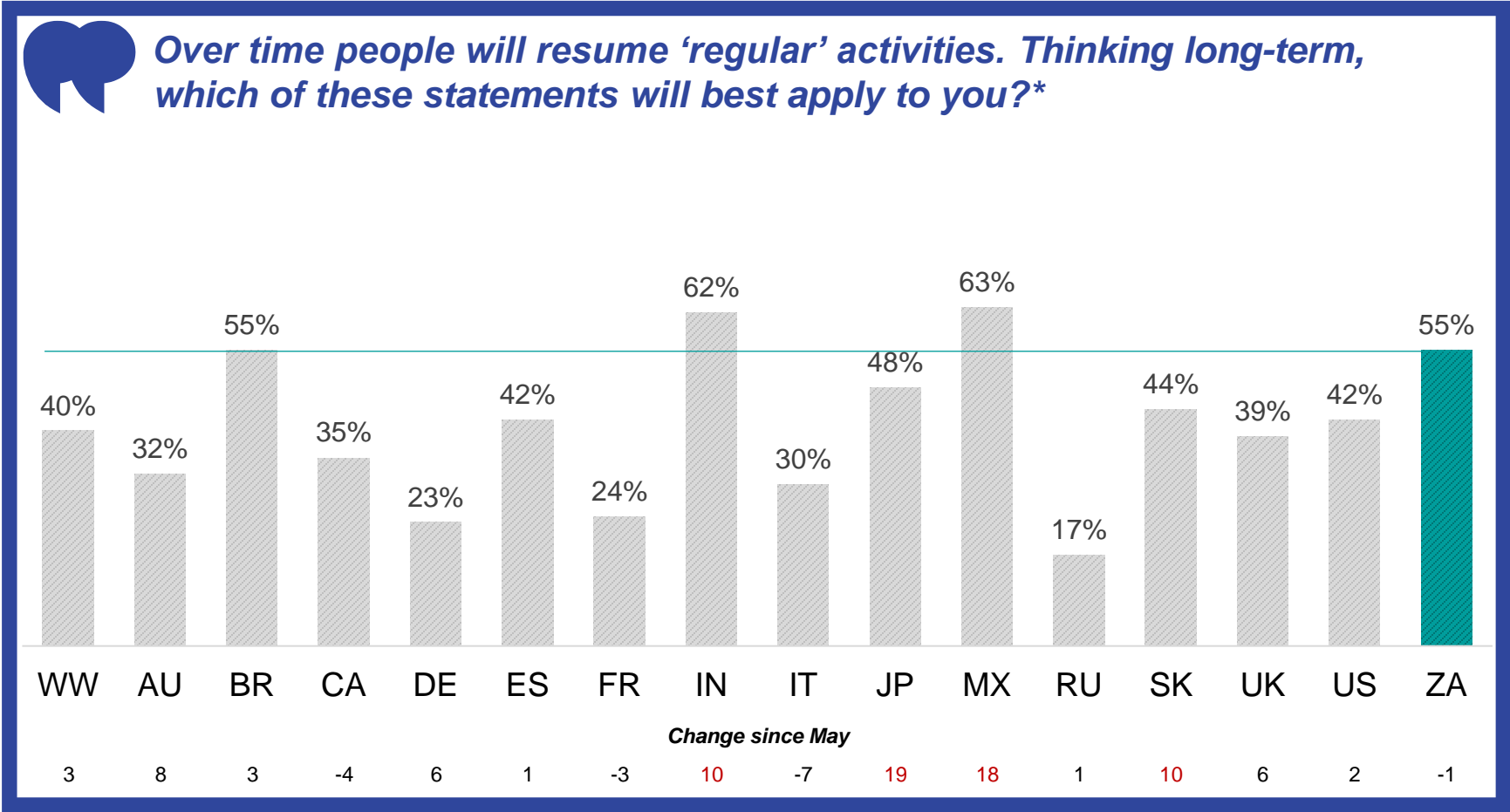


There is a growing recognition that we will not be returning to the lives we knew anytime soon.

% Strongly/Somewhat Agree

WE QUESTION IF NORMAL WILL EVER LOOK LIKE ‘NORMAL’ AGAIN?

Mexicans, Indians, South Africans and Brazilians expect to adapt to a new world



“A brave new world...”

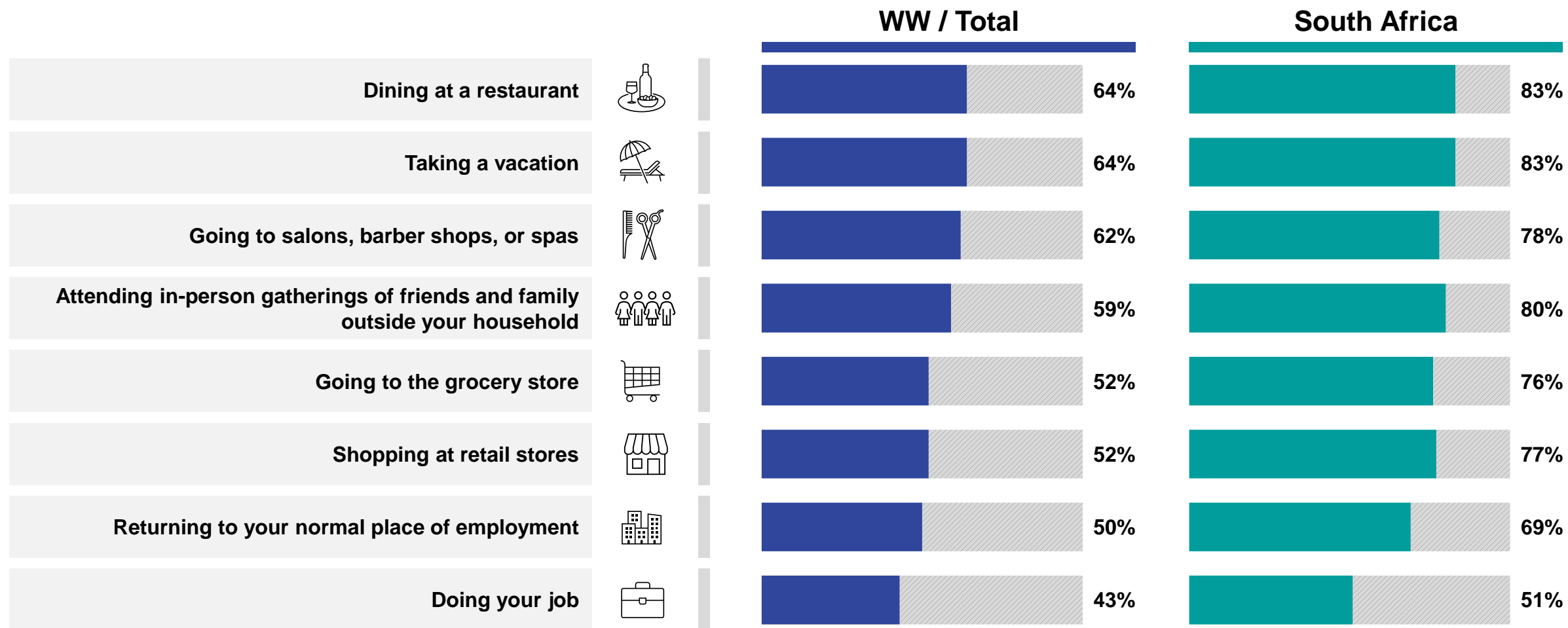
* I will change many things about the way I live and what I do
 * My life will completely change as a result of Covid-19

% Many changes & Completely change



...AND THERE ARE MANY NEW RISKS TO BE TAKEN

South Africans foresee also many practical risks to be taken in the post-Covid world



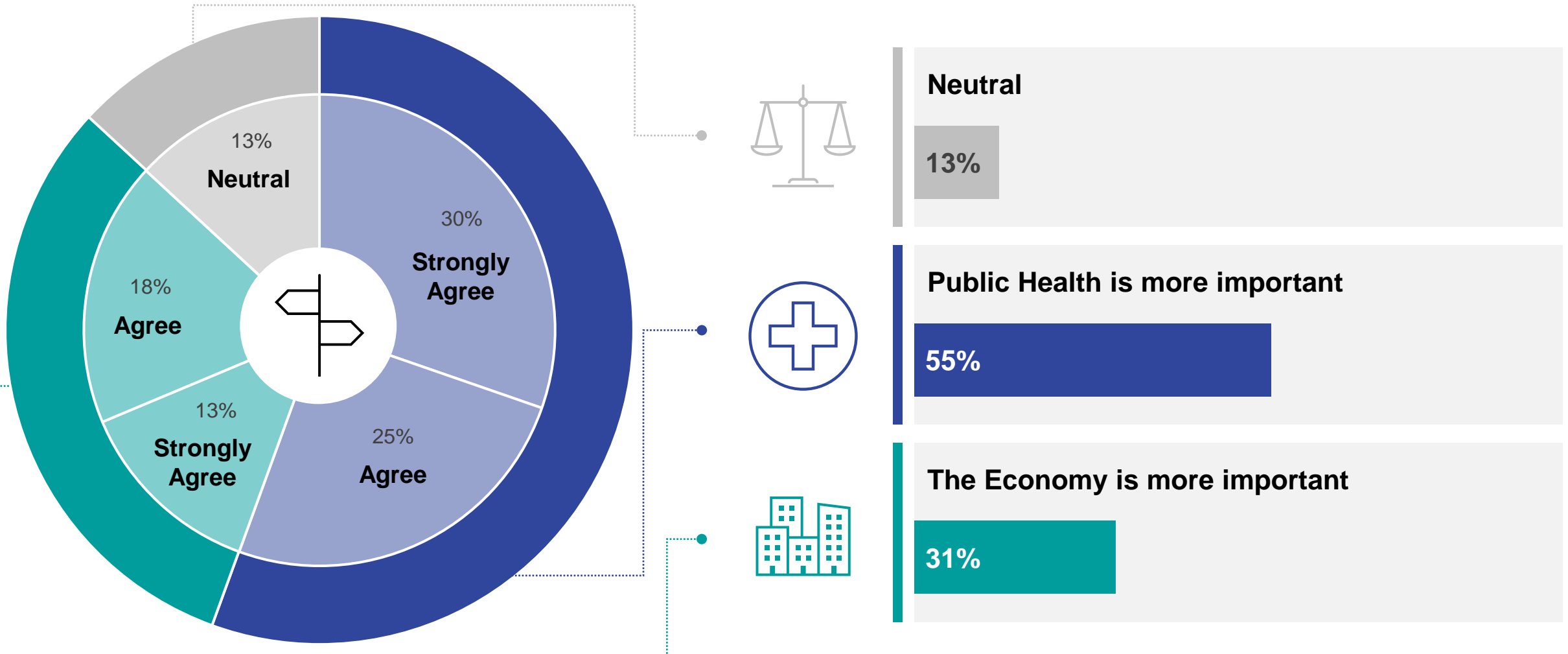
% Large & Moderate Risk

June 2020



... AND CHOICES TO BE MADE

Living with the tension between public health and the economy

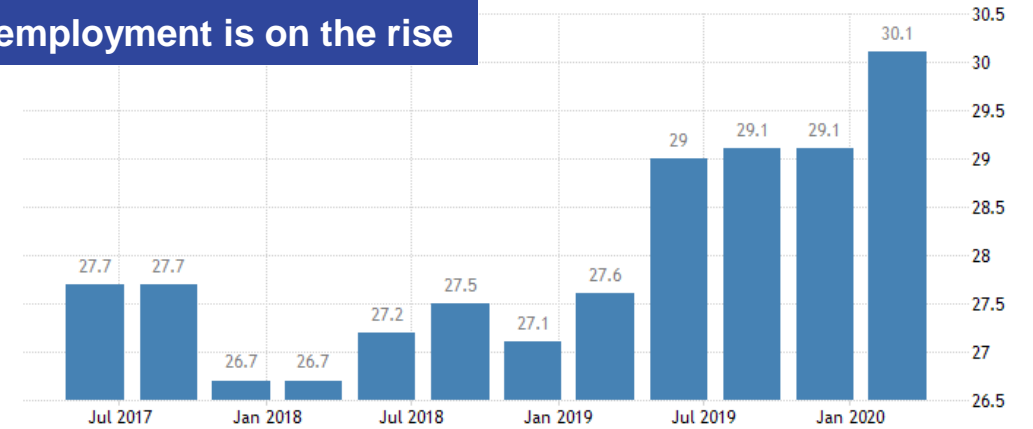


THE SOUTH AFRICAN ECONOMY HAS BEEN STRUGGLING FOR A WHILE

GDP QTR Growth Overview

| Calendar | GMT | Reference | Actual | Previous | Consensus | TEForecast |
|------------|----------|-----------|--------|----------|-----------|------------|
| 2019-06-04 | 09:30 AM | Q1 | -3.2% | 1.4% | -1.7% | -1.4% |
| 2019-09-03 | 09:30 AM | Q2 | 3.1% | -3.1% | 2.4% | 2.3% |
| 2019-12-03 | 09:30 AM | Q3 | -0.6% | 3.2% | 0.1% | 0.3% |
| 2020-03-03 | 09:30 AM | Q4 | -1.4% | -0.8% | -0.1% | -0.4% |
| 2020-06-30 | 09:30 AM | Q1 | | -1.4% | | -3.4% |
| 2020-09-08 | 09:30 AM | Q2 | | | | -5.8% |
| 2020-12-08 | 09:30 AM | Q3 | | | | -4.7% |

Unemployment is on the rise



SOURCE: TRADINGECONOMICS.COM | STATISTICS SOUTH AFRICA

Consumer Confidence

| South Africa Consumer | Last | Previous | Highest | Lowest | Unit |
|-----------------------|-------|----------|---------|--------|------------|
| Consumer Confidence | -9.00 | -7.00 | 26.00 | -33.00 | points [+] |



Weakening Rand

USD to ZAR Chart

24 Jun 2019 00:00 UTC - 22 Jun 2020 20:38 UTC USD/ZAR
close:17.34200 low:13.86689 high:19.26367



USD to ZAR Stats

| | Last 30 days | Last 90 days |
|------------|--------------|--------------|
| High | 17.6415 | 19.2637 |
| Low | 16.5249 | 16.5249 |
| Average | 17.1945 | 18.0050 |
| Volatility | 1.04% | 1.16% |

AND COVID-19 HAS MADE THINGS WORSE


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BANKING BUSINESS FINANCE MOTORING INDUSTRY NEWS MOBILE

Ramaphosa warns of job losses: 'We have to be realistic about our prospects'

Staff Writer 22 June 2020




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BANKING BUSINESS FINANCE MOTORING INDUSTRY NEWS MOBILE

South Africa faces 'historic' Covid-19 economic shock

Staff Writer 28 May 2020



← Tweet

 The Sun
@TheSun

A 2.5 mile queue of people wait to collect food parcels in Centurion, South Africa



215K views

For its part, S&P notes that 2020 has one thing in common with previous years — **most South Africans will be poorer at the end of the year than they were at the start.** The government can at least blame the pandemic this year.

<https://www.dailymaverick.co.za/article/2020-05-25-sp-sees-sa-economy-contracting-4-5-in-2020-and-notes-sour-long-term-gdp-per-capita-trend/#gsc.tab=0>

HOW IS ALL THIS MAKING YOUR CUSTOMERS FEEL

Find out with 'Closer to Customer': A qualitative immersive experience.

Be part of consumers' new reality and understand the new norms shaping their lives and behaviors.

Decisions which normally took a long time to negotiate are currently being made on the spur of the moment and sometimes with very little consideration. People are faced with new challenges daily which needs to be resolved in a quickly shifting environment. Now more than ever it is important to stay close to customers to tap into these behavioural changes and get a feel for what will stick and what will be discarded.

We have designed a series of qualitative immersive experiences in order to be part of consumers' reality and understand the new norms shaping our lives and behaviours. Our solution is flexible and affordable, allowing for a degree of customization when it comes to adding specific research questions and modular approach to purchase.

OUR PROPOSITION AT A GLANCE

1

WHAT DO WE SELL?

- A bundle of 3 conversations across 3 different LSM levels of a research topic
- You can choose how many topics you want to purchase

2

WHY DO YOU NEED THIS?

- Our research is designed to answer your questions in a way that is engaging, immediate and comes at an affordable price

3

WHAT IS THE STRUCTURE OF A GROUP?

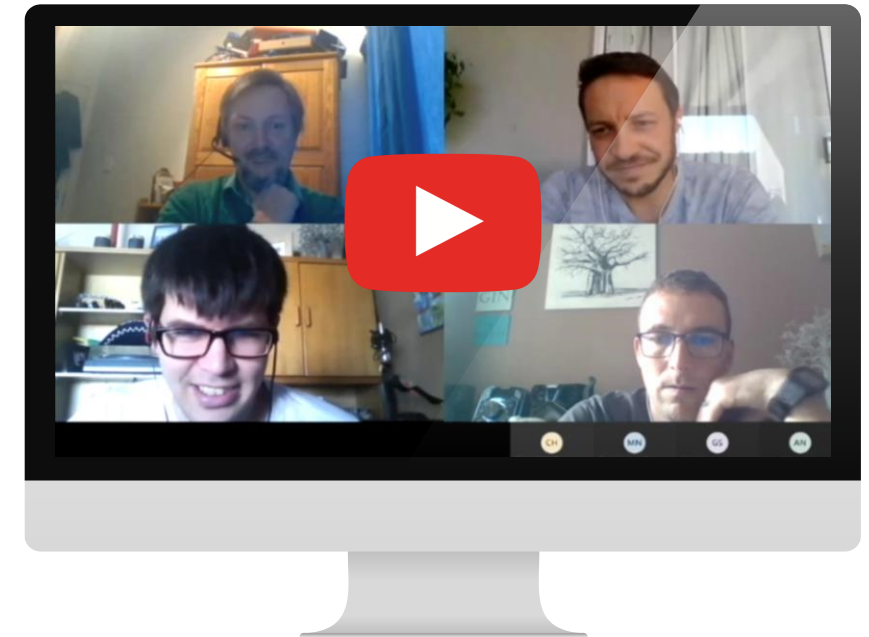
- 4 respondents per group, 1 Hour online conversation
- You would be invited to listen in with space for asking questions directly to the participants for 20 minutes at the end of the session

4

WHAT IS THE OUTPUT?

- 5 Minute impactful videos per topic across LSMs

| | Ownership | # of groups | Price |
|--------------------|--------------------|-------------|----------|
| 1 topic of choice | Individually owned | 3 | R75 000 |
| | Shared | 3 | R45 000 |
| 2 topics of choice | Individually owned | 6 | R126 000 |
| | Shared | 6 | R78 000 |
| 3 topics of choice | Individually owned | 9 | R162 000 |
| | Shared | 9 | R99 000 |
| All 8 topics | Individually owned | 24 | R432 000 |
| | Shared | 24 | R264 000 |



A Sense of Fear, Anxiety and Uncertainty



AND THIS ANXIETY IS EXPECTED TO LINGER

Over 50% stating their finances have severely been affected & those not yet impacted anticipate to be impacted in the future.

• APRIL 2020 •

Do you agree or disagree with the following:

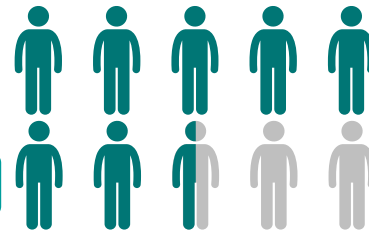
Very Likely / Somewhat Likely

The coronavirus or COVID-19 outbreak will have a financial impact on me and my family



90%

A major employer in South Africa or in my city will go out of business



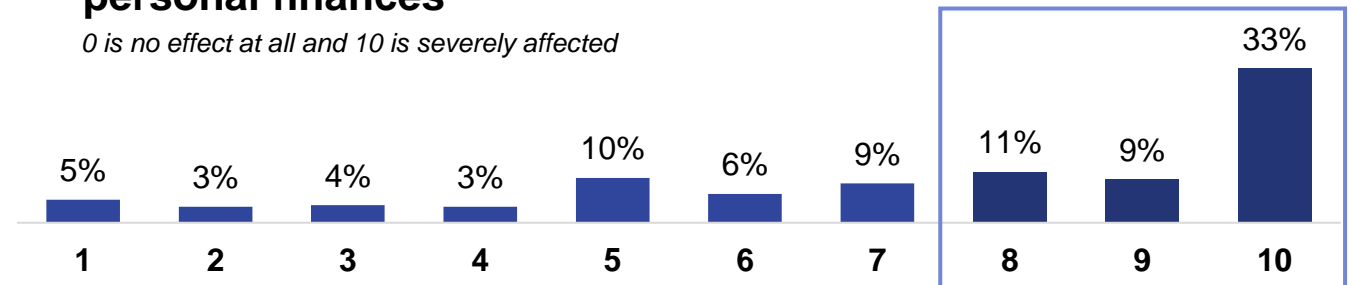
75%

Wave 2: n=1,000 / N=26,411,804

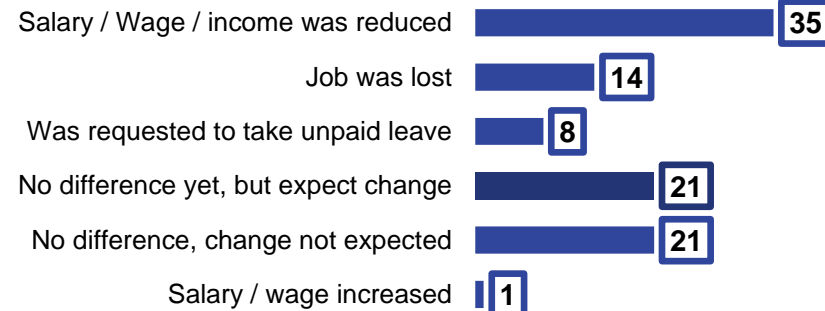
• MAY / JUNE 2020 •

Q: How severely or not has the Covid-19 pandemic affected your personal finances

0 is no effect at all and 10 is severely affected



Q: How was your salary/wage/income affected by the Covid-19 pandemic?

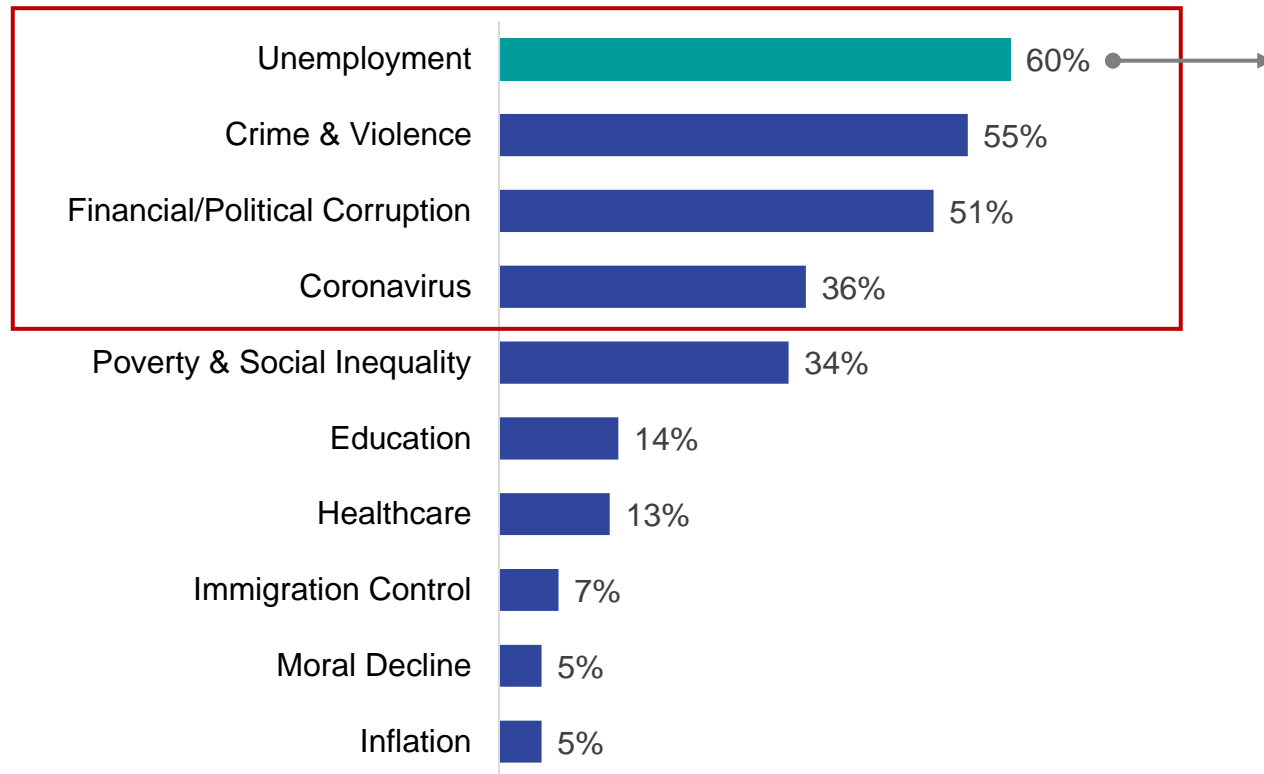


UNEMPLOYMENT IS OUR TOP CONCERN

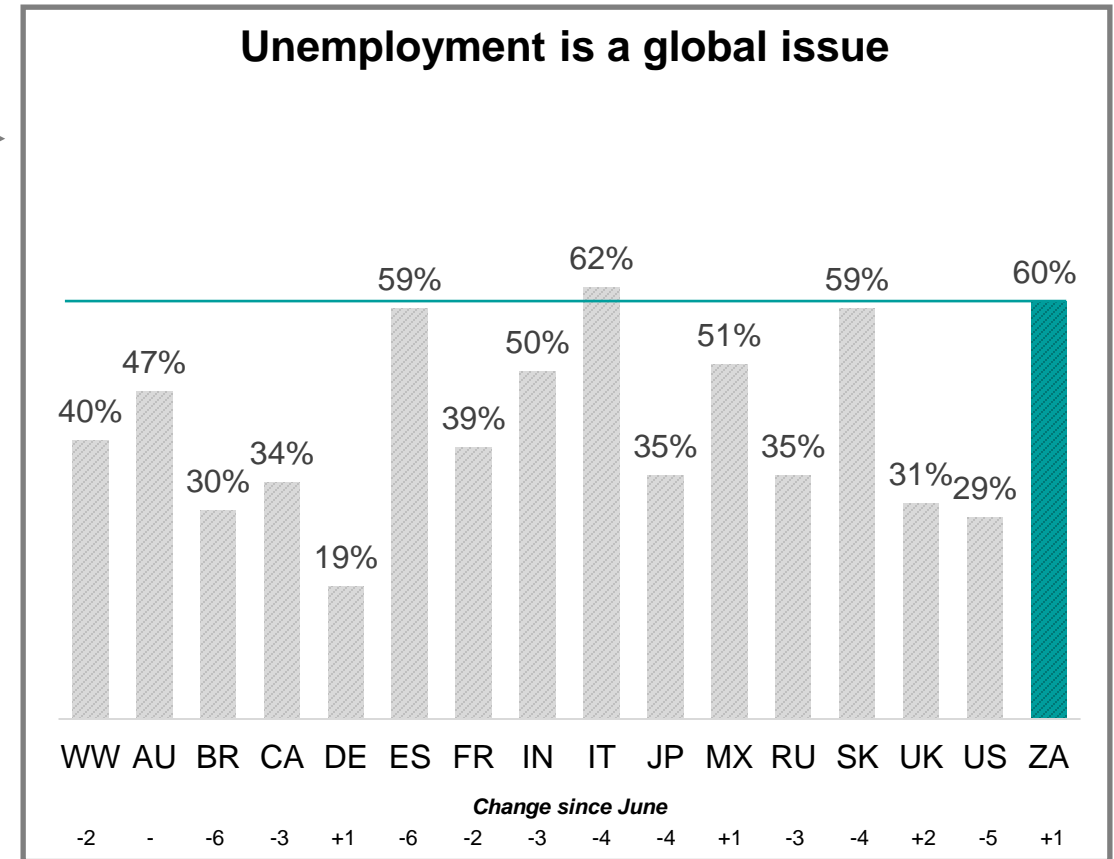
With the COVID-19 pandemic only ranking 4th after Corruption and Crime & Violence

76% stated that they were earning an income pre-lockdown and of them 78% said their job security and salary have been affected by the lockdown. Covid-19 is ranked 4th on SA's Worries. SA continues to feel the strain from pre-Covid19 issues.

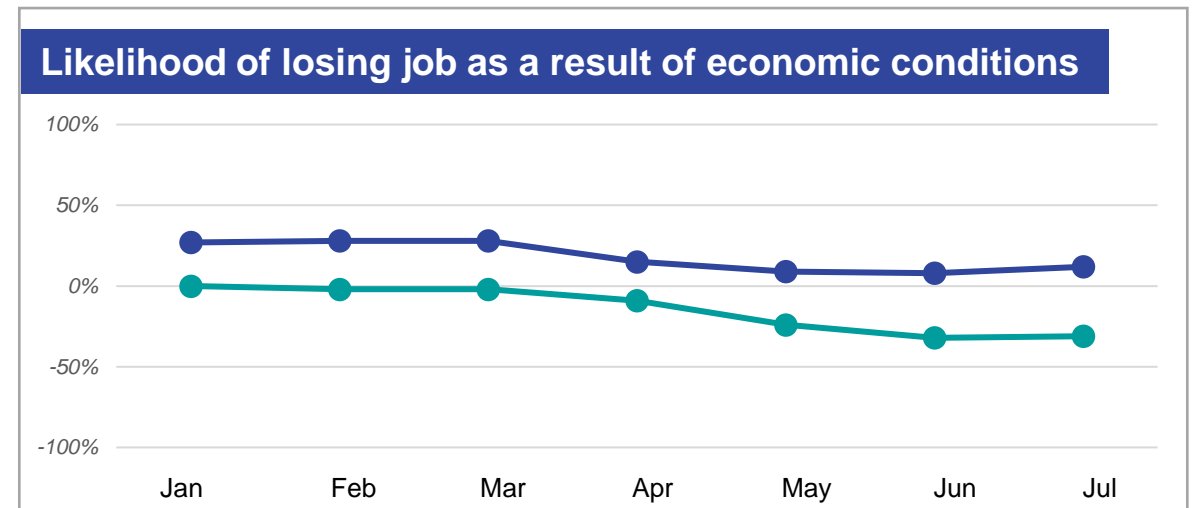
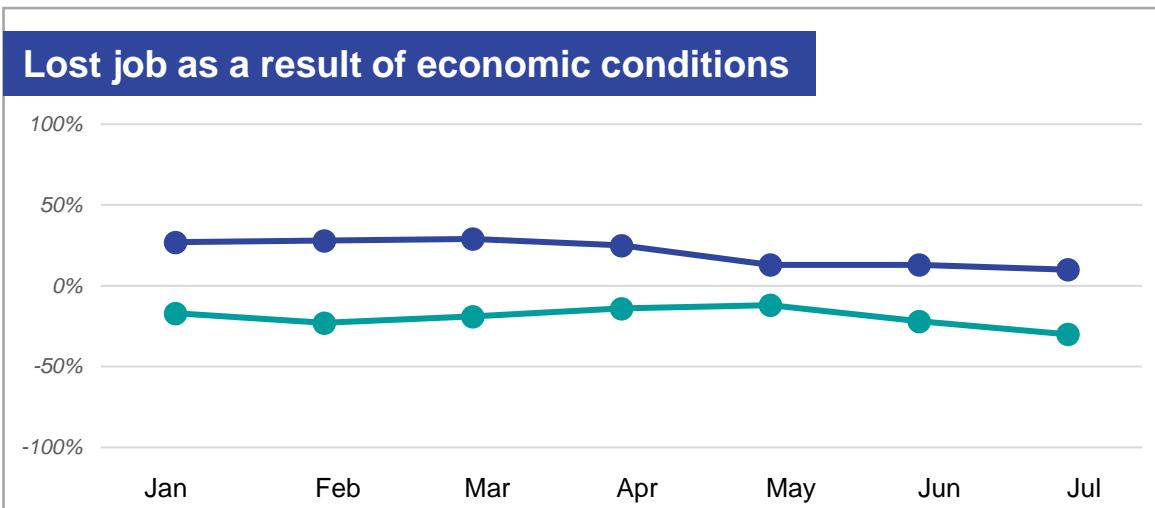
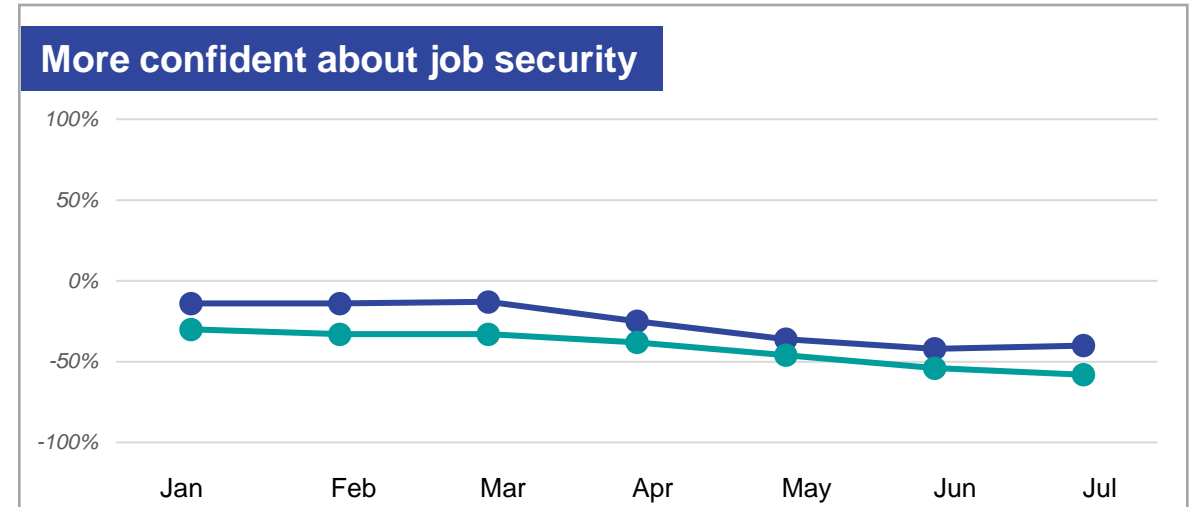
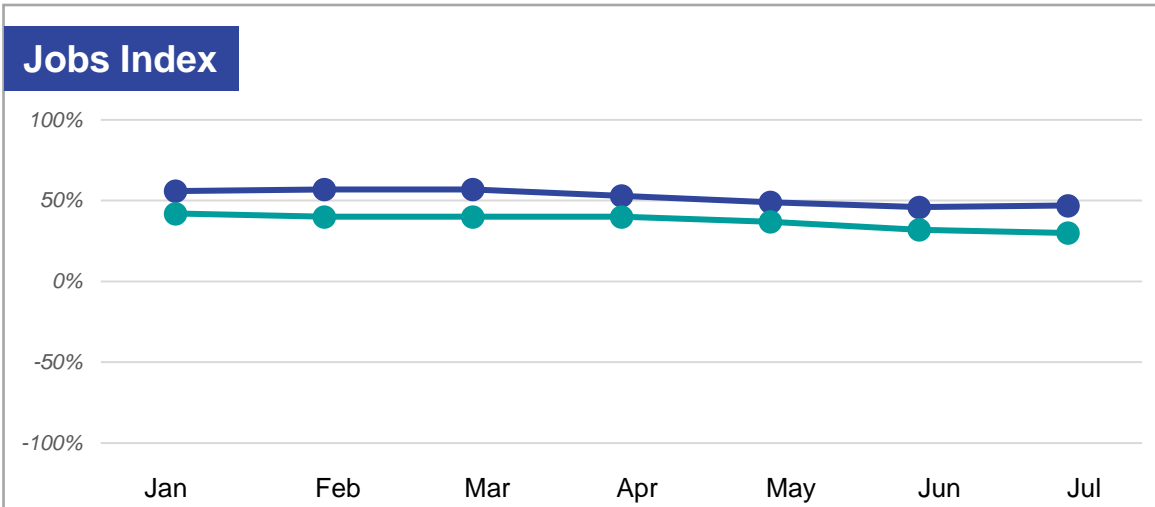
South African Worries – July 2020



Unemployment is a global issue

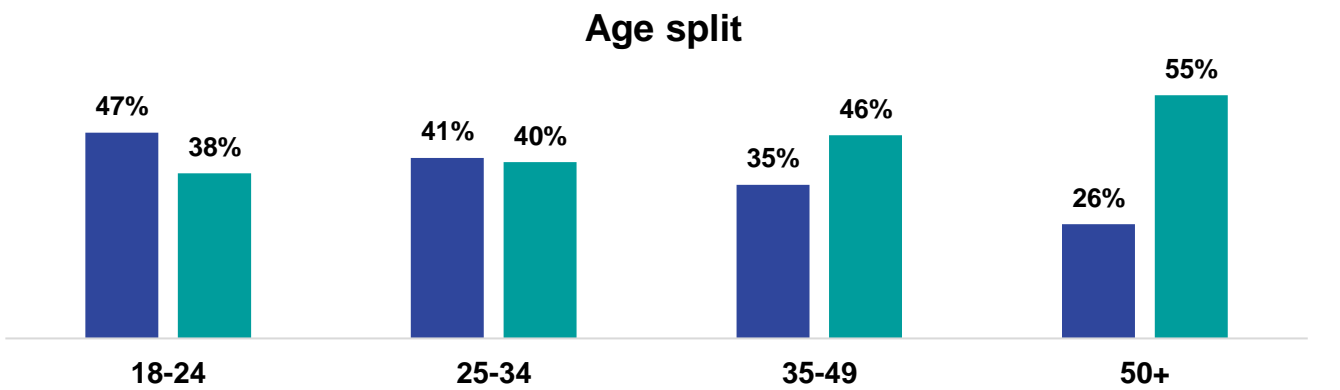
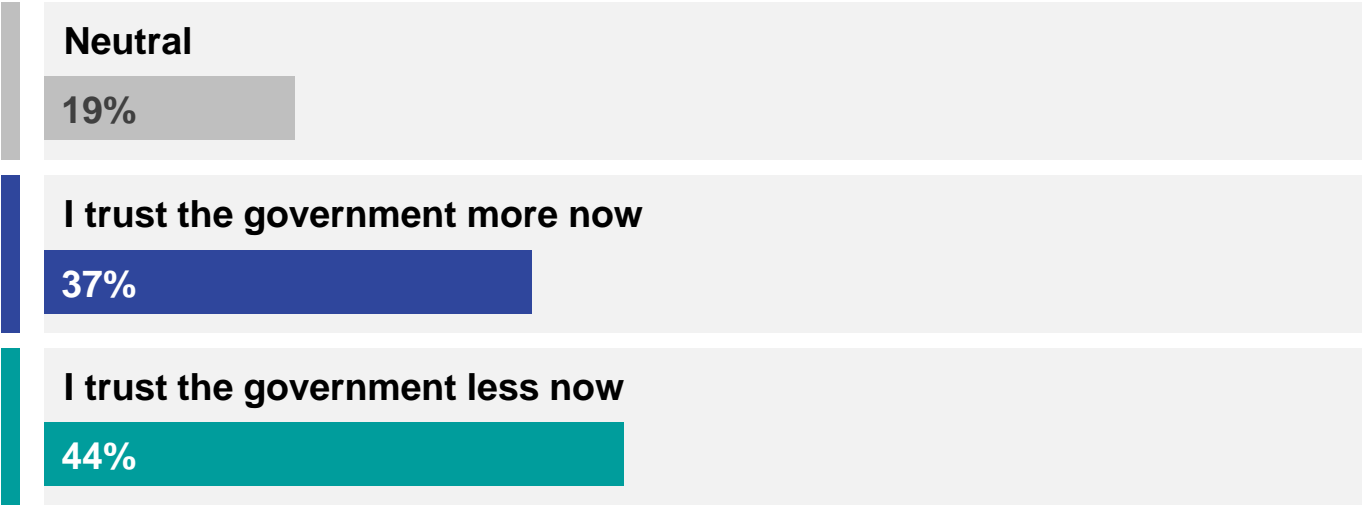
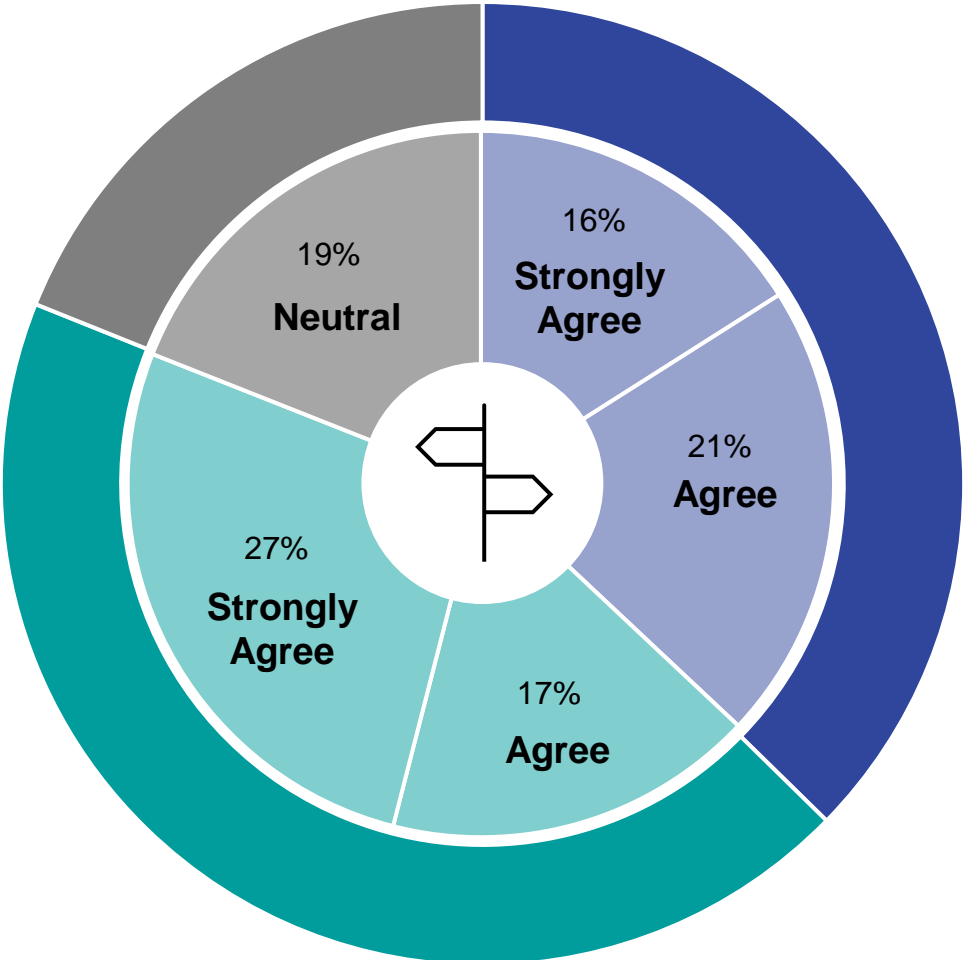


DECLINE IN JOB SECURITY



WITH MOST TRUSTING THE GOVERNMENT LESS THAN BEFORE THE PANDEMIC

Although most respondents believed that the government is handling the Covid-19 pandemic well, the trust in government is less now than before pre-Covid-19.



THERE IS STILL STRONG APPROVAL FOR THE PRESIDENT

Nkosazana Dlamini-Zuma



Nkosazana Dlamini-Zuma received low approval overall, this could be attributed to the negative sentiments pertaining to the tobacco ban

Bheki Cele



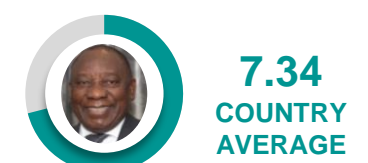
Similar to NDZ, Bheki Cele has low approval amongst the three major provinces. Increased GBV and mishandling of civilians by SAPS has contributed to a poor public image

Zweli Mkize

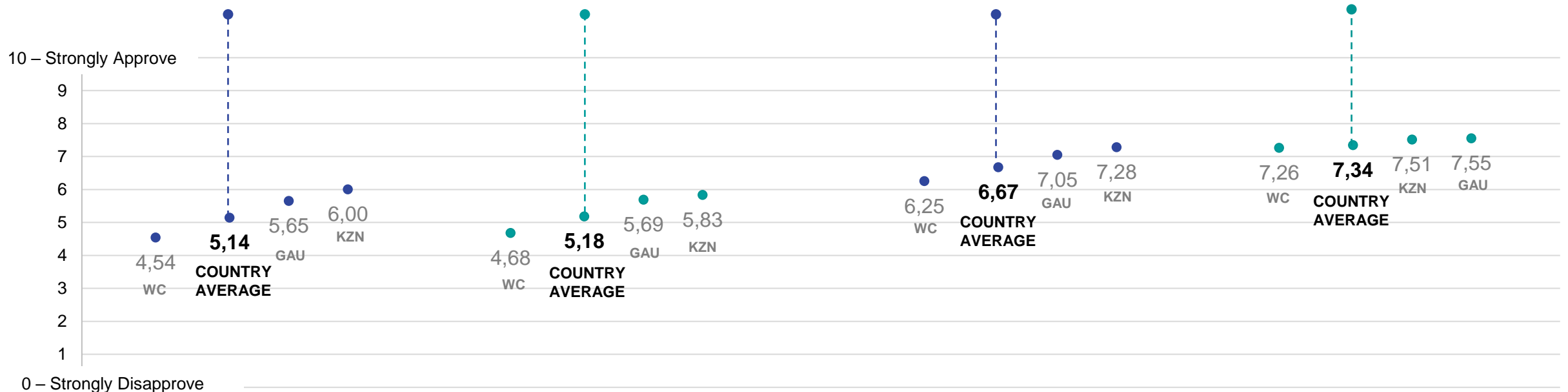


Much better support in the three major provinces than BC and NDZ. Receiving mostly neutral sentiments; public generally agrees with health and safety measurements

Cyril Ramaphosa



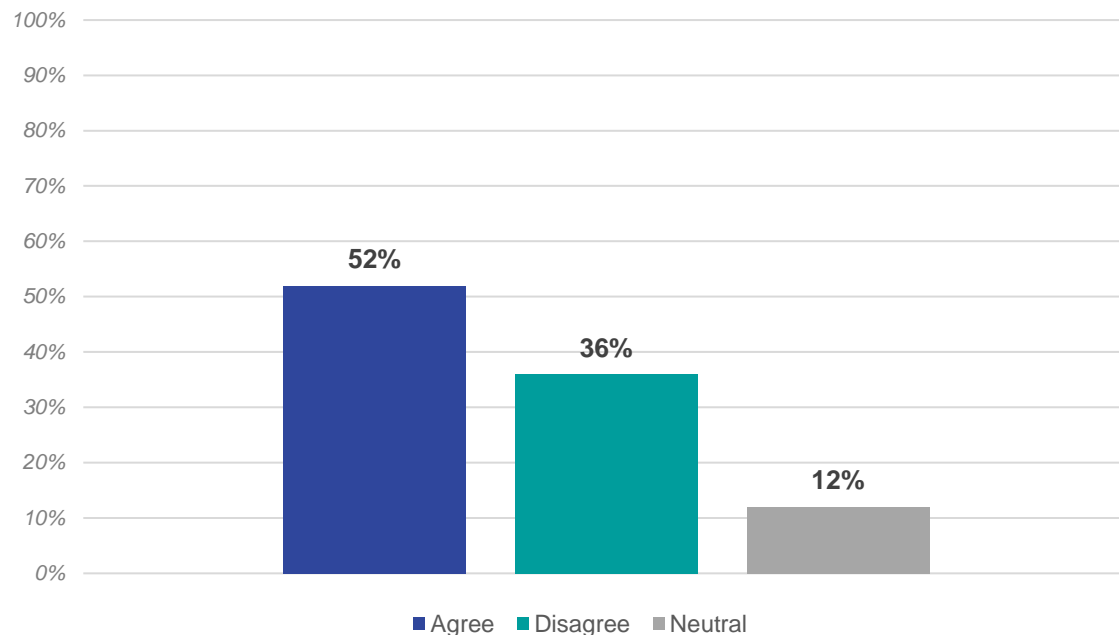
Strong support for the president in DA led WC, similarly in GAU and KZN. Most South Africans approve of the way President Ramaphosa has responded to the pandemic



SOUTH AFRICANS FEEL GOVERNMENT'S COMMUNICATION SHOULD IMPROVE

The drop in trust in government could have been influenced by some of the rules and regulations they undertook in order to manage the Covid-19 outbreak. Although most of the respondents supported the initiatives the government undertook, majority of respondents also felt that communication was vague and confusing.

Vague and confusing communication from the Government



Q4. To what extent do you agree or disagree with the following: Government's communications on lockdown rules and regulations have been vague and confusing.

Support for the Government stimulus package



60%

Both the R500 billion government stimulus package and the initiative to assist the poor, were supported by 60% of the respondents. It was mostly respondents who lived in Gauteng, KwaZulu Natal and the Western Cape who supported the R500 billion stimulus package. While participants aged between 18-24 years supported the government assisting the poor.

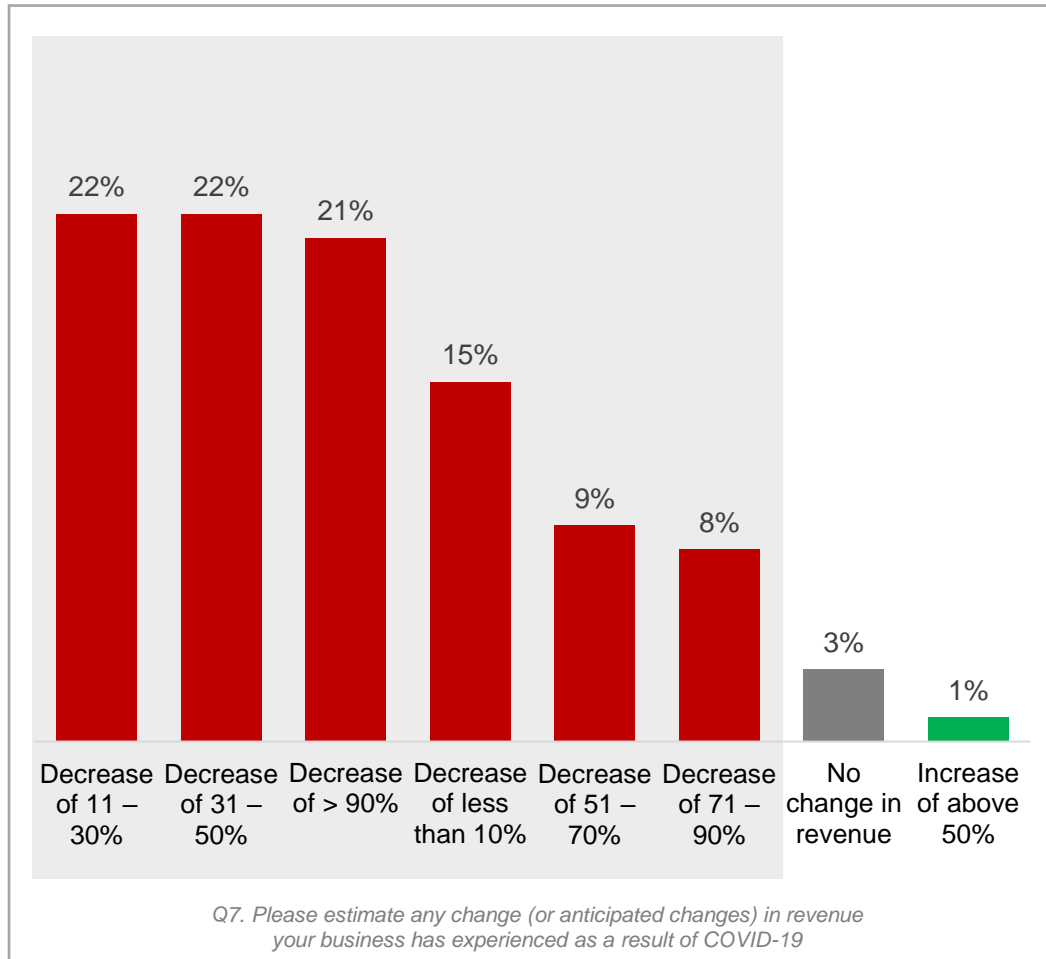
Q4. To what extent do you agree or disagree with the following: I support the R500 billion government stimulus package.

Are SMME's benefitting from Government interventions?



SMME'S DRIVE JOB CREATION AND ECONOMIC GROWTH

The impact of lockdown has been significant considering the already weak economy



Unemployment:

R3mil lost jobs since lockdown inception on 27 March 2020, 18% decline in employment Feb to March 2020.

South Africa is calling for SMME's to be supported.



Vusi Thembekwayo speaks out blaming SA Government

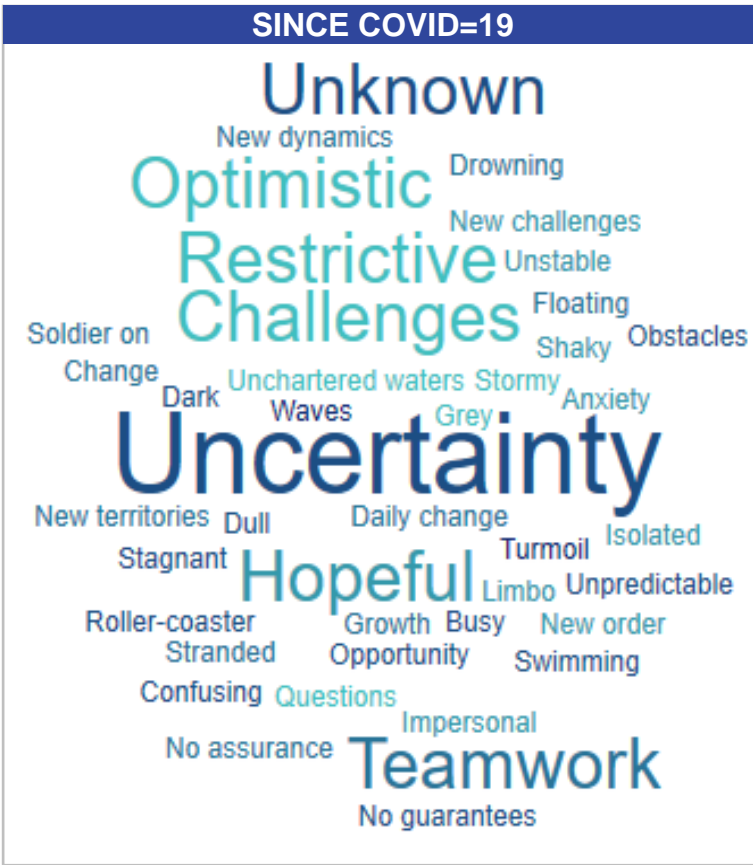


RASA & Four Cousins initiative #Jobssavelives

SMME'S ARE FILLED WITH UNCERTAINTY YET REMAIN HOPEFUL

The start of 2020 brought renewed goals and energy. They were optimistic and looking forward to growth and expansion despite a challenging economy

Businesses have been immersed into turmoil, fear of the unknown and uncertainty. Despite this, a sense of optimism immersed based on human collaboration and resourcefulness



There is a *new rhythm* in the way we work. Despite the initial significant chaos, a new normal is being restored. The pace has decreased but there is a lot more order.

With the beginning of lockdown, *fear of the unknown and uncertainty* played a major role in our decision making. Fear turned to *panic...* that we may be asking too much of our staff, but they proved us wrong by coming to the party. Panic turned to motivated...*motivated* to ease our team's challenges by being there, being available, motivating, helping each other.

The different bright colors symbolize the *turmoil* that our workplaces are in. It feels that if we don't adapt soon, everything will get mixed up and we will lose our business ... *emotions are in turmoil, anything could happen, and everything is uncertain.*

My staff's *uncertainty* made me feel like a father who was *confused* and didn't know what to say to his family about the future. We've had to *come together.*

BUSINESS EMOTIONAL STATES



THEY ARE SHOWING THEIR ENTREPRENEURIAL SPIRIT - FORCED TO PAUSE, RETHINK AND BE RESOURCEFUL

Most businesses are cautiously optimistic about the future.

A sense of togetherness and empathy immersed in workplaces and staff's wellbeing and security are top of mind. Incurring further debt to survive financially, is a last resort for most, instead they have employed various coping mechanisms:

Delving into personal savings

Negotiating payment terms and discounts

Looking to support local suppliers

Cutting operational costs

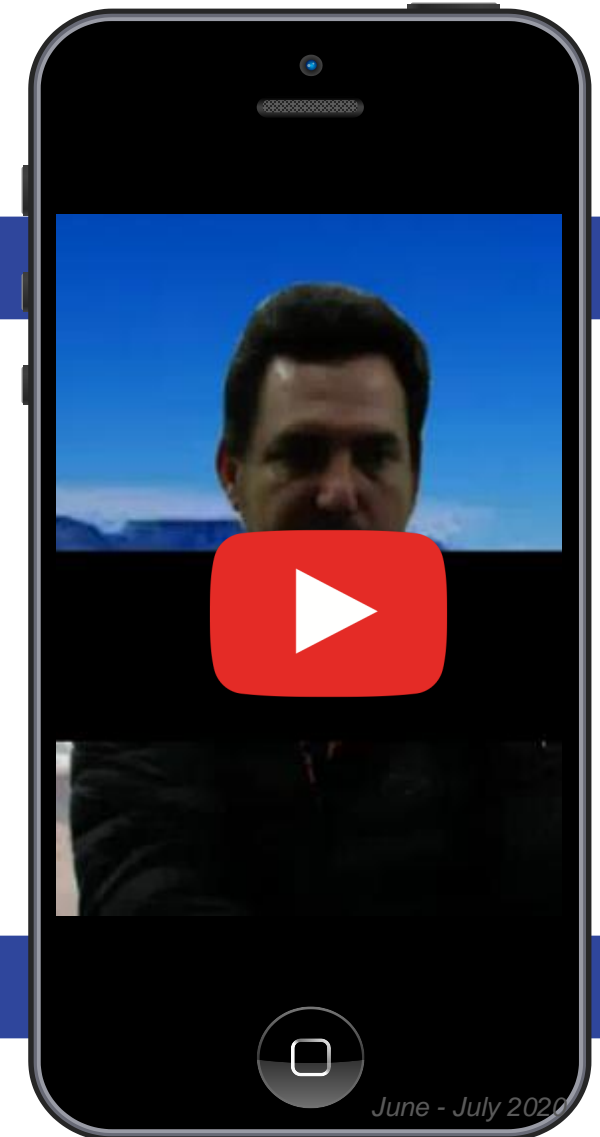
Expanding business portfolio's by applying skills & thinking out of the box

Leaping into the digital world

Finding new marketing avenues

Utilising social media

Offering their services in exchange for payments, etc.



MANY ARE NOT YET BENEFITING FROM THE SUPPORT PUT IN PLACE BY GOVERNMENT

Not everyone applied for Government support, and many who did still have not received feedback

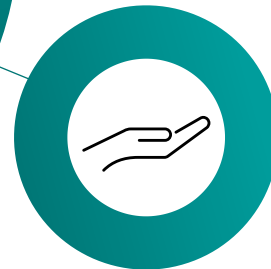
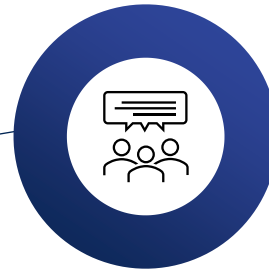
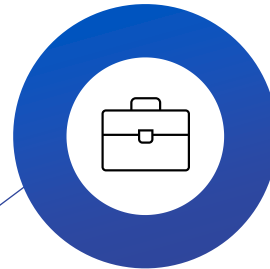


Yes, I applied for the TERS funds. Have received acknowledgement of the application and nothing further. It would have made a difference financially

No applying did not make a difference since I opted for a loan that will sustain my business for the next 6 months.

We applied for support but it was not approved. The pitfall being our BEE status.

DID YOU APPLY FOR SUPPORT?



UIF:

- Improve communication (feedback on application) & turnaround time
- Applied but was only able to pay a few employees – Foreigners

Support from solidarity / initiatives launched

- Don't qualify because of BBBEE
- Many applied but did not receive feedback
- Some didn't apply but rather used savings or took out a loan
- Concern raised about fairness of the qualifying criteria
- Some don't understand how it works and how to apply

What can be done to help:

- Help pay for COVID related burials
- Better communication on process of application and outcomes
- Get more support for SME's from big corporates for subsidiaries
- Tax relief for 6 months to 1 year
- Need transparency and improved communication
- Improve strategy for future pandemics
- They need better IT systems

AND MOST WISHING FOR A PROSPEROUS ECONOMY

Stability, Funding, Growth and Opportunities are what the majority wish for the future

YOUR WISH FOR YOUR BUSINESS

IMMEDIATE FUTURE?



My business wish is to see this business ranking at the top level going forward and to have more branches nation wide

I would wish for more opportunities to come out of this outbreak so we can restore the dignity of our people through creating employment And we wish for funding to support us as we try to get back on our feet

For a prosperous SA.

Abundant funding available for business growth

I wish our government could have given us financial support. I wish the government can keep to their promise by investing more money into infrastructure development. This will benefit a lot of SMEs and create a lot of jobs at the same time.

A stabilisation of the SA economy and currency to be more affordable for SA to import and export goods and services

UNDERSTANDING THE ROLE AND NEEDS OF SMME'S IN COVID-19

SMEs ARE THE BACKBONE OF THE ECONOMY

Small and Medium Enterprises are employing millions of South Africans, but they are also the “incubators” for new ideas, economic development and entrepreneurship. They play a leading role in the services industry, and it will be impossible to imagine a future without the hairdressers, hardware stores, plumbers, electricians and many more dotting the streets of both big cities and little towns.

The impact of the coronavirus pandemic on this sector of the economy has been rather devastating – many people lost their jobs or were placed on furlough and those working on a commission basis suddenly saw their salaries shrinking – as businesses were closed.

The aim of the planned study will be:

- to provide a tool to service providers to SME's to understand how their clients are being impacted by the COVID-19 pandemic
- to enable service providers to respond to their changing environment and needs.

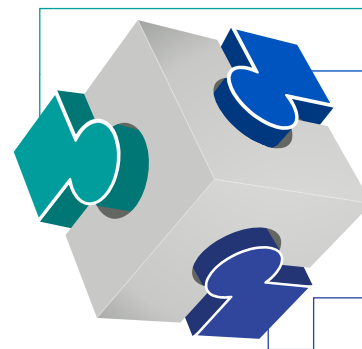
TOTAL COST: R65 000*

WHAT WE NEED TO UNDERSTAND AND EXPLORE

How SME's in South Africa have been impacted by the pandemic and what measures can be put in place to support them. More specifically:



BRIDGE THE GAP - 3 STAGES OF UNDERSTANDING



Qualitative view: Explore /Understand

Online focussed discussion with 20-30 SME owners to gain depth of understanding on key issues.

Cost: R25 000

Quantitative view: Quantify themes

Online survey to the broader SME universe in SA to quantify key themes identified from the exploration phase.

Cost: R40 000

Qualitative view: Test concepts

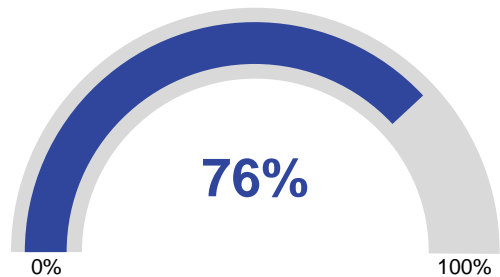
Online focussed discussion where organisations have the opportunity to test various concepts and approaches with the SME audience prior to launch (Optional)

There has been an
impact on people...



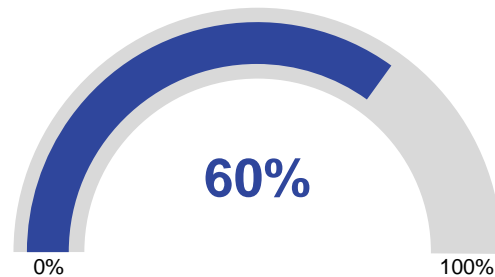
PEOPLE OF ALL AGES ARE FEELING THE PINCH

Resulting in a change in behaviour



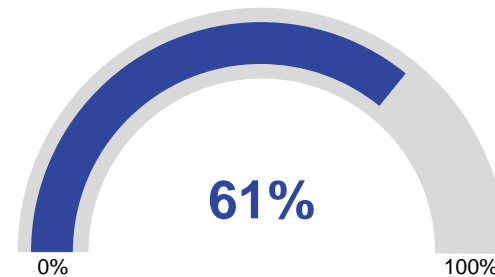
Delayed expenditure

Are delaying a major purchase because of what is happening



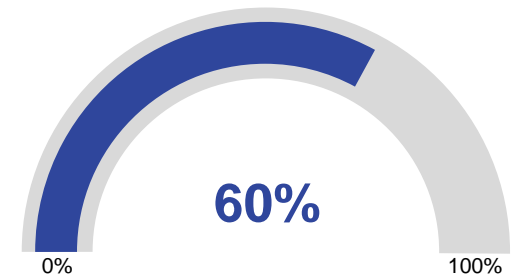
Used savings to cover expenses

Have already used some of their savings and emergency fund to cover expenses, especially those aged between 18 – 34 years.



Monthly debt & loan repayments

Are concerned that they won't be able to meet their monthly debt and loan obligations, with the concern greater amongst those aged between 25 - 49 years.

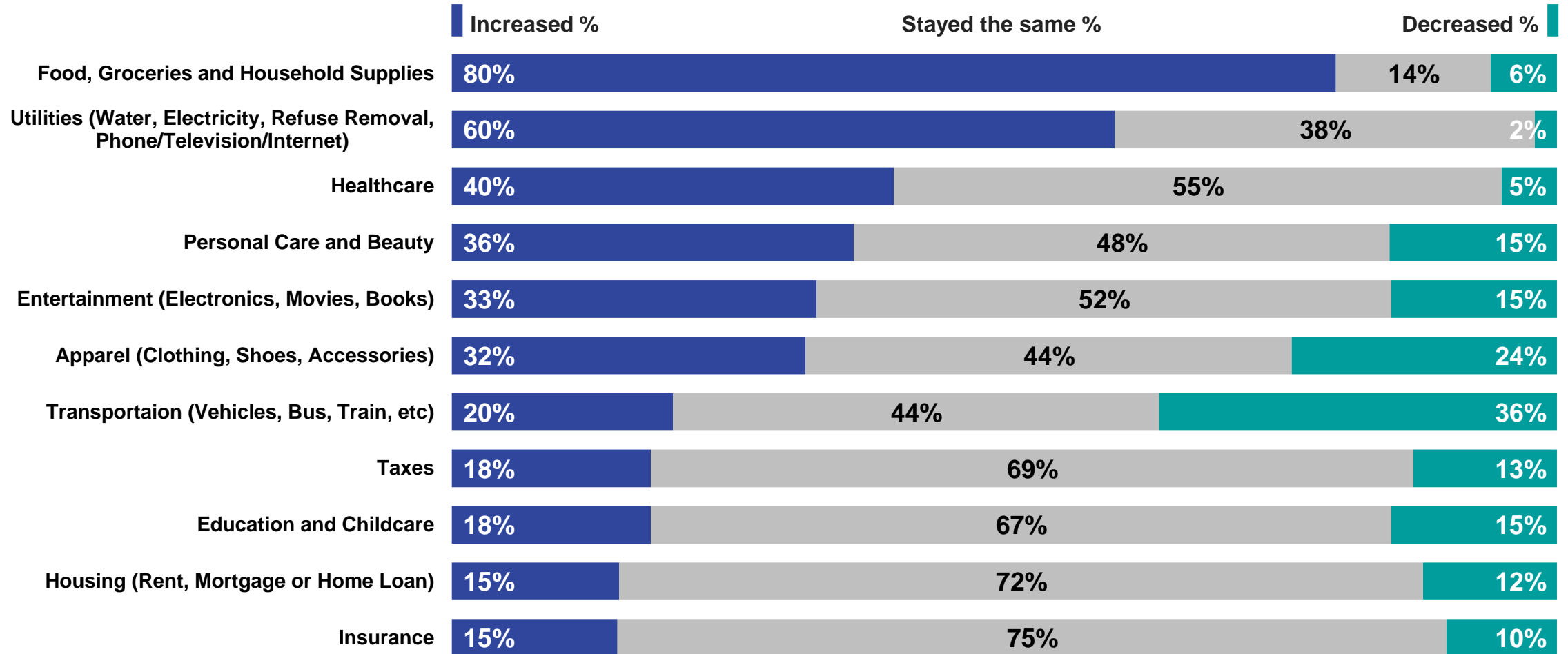


Retirement savings

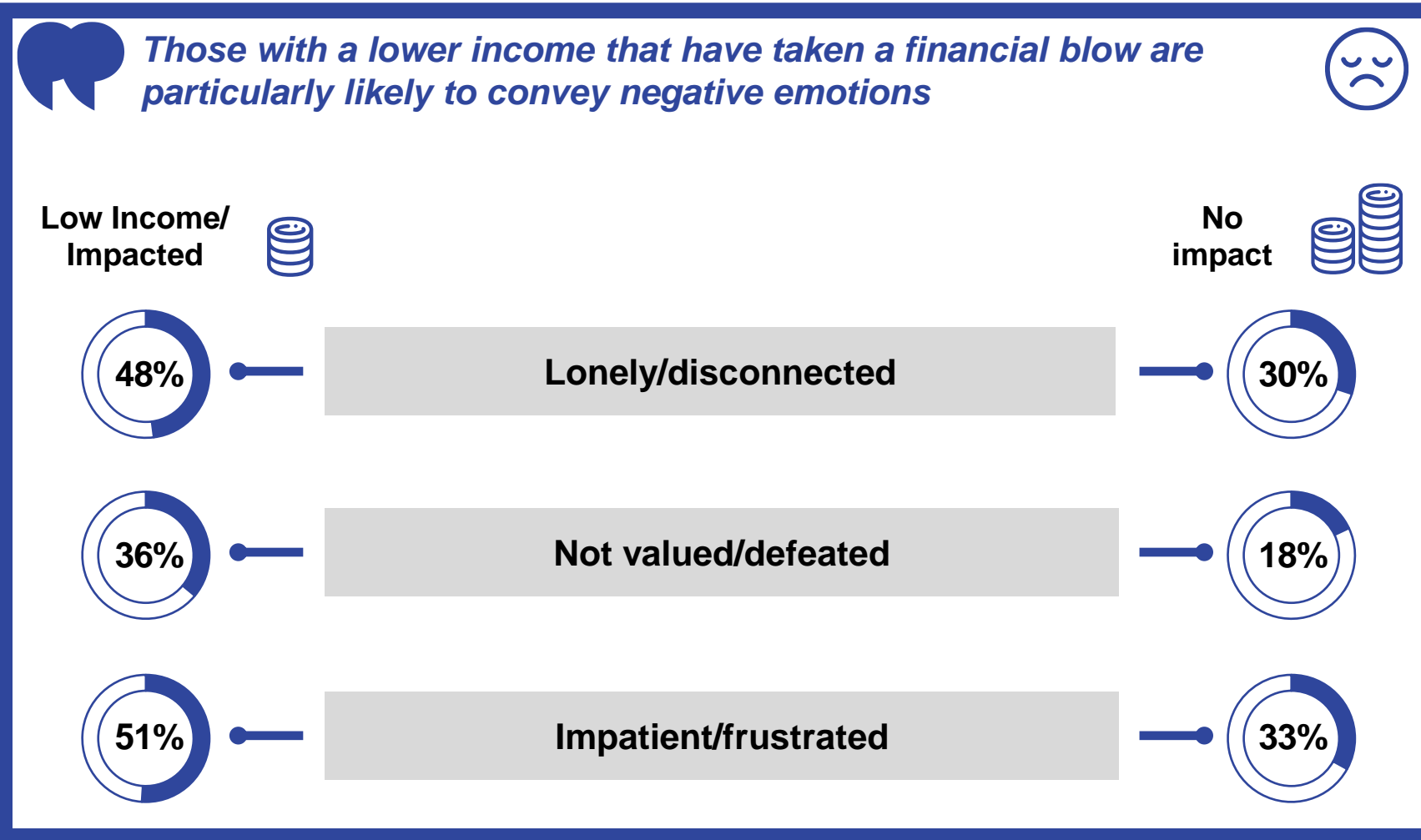
Are worried that Covid-19's impact will damage their retirement savings. 75% of those aged 50 years and above were concerned that it might impact their savings as they face retirement soon.

FRUGAL SPENDING IS HAPPENING IN VAIN AS COSTS OF ESSENTIAL GOODS ARE ON THE RISE

Which costs have gone up?



RESULTING IN A STRONG LINK BETWEEN FINANCIAL AND EMOTIONAL HEALTH



Younger people are more likely to share negative feelings, while those over 50 generally share a more confident/pragmatic positivity.

SO WE FIND OURSELVES BETWEEN A ROCK AND A HARD PLACE

The fear of
the
coronavirus



The economic
and financial
pressure

BUT WE SHOW OUR RESILIENCE, AND THERE IS STILL A LOT OF GOOD HAPPENING AROUND US

Fusion centres – pooling of resources

Perhaps the investigations into C-19 projects give SA the opportunity to make collaboration of government/media/civil society work on a wider basis

Transparency: Transparency and collaboration with Vulekamali programme of Treasury and Imali Yethu

SA engineers' designed ventilators went into production



The SA recovery rate from Covid-19 is more than 70%+, also an emerging downward trend in new daily infections. Many HIV+ patients in the EC's Oliver Tambo district survived

Our death rate is 1.7%

The Mandela shirt factory in Cape Town now produces 2,5 MILLION masks a month

Rhino poaching plummeted 53% during lockdown

HOW TO DEAL WITH YOUR CUSTOMERS DURING THIS CHANGING TIME

Customers are changing and what is important to them is also changing

Keep up with these changes and be responsive

Price is becoming more and more important to customers

This might drive switching behaviour

**Put your customers at ease.
Make them feel safe**

Keep on communicating the Covid-19 measures

Provide empathic customer experiences

They need to feel that you understand them and support them in these tough times

Help them work smarter (Advice on business, financial management, marketing and more)

Specifically SMME organisations and customers who are financially under pressure



WHAT CAN BE EXPECTED OF SOUTH AFRICANS IN BUSINESS, GOING FORWARD?

Join us on the Mzansi Roars journey: A study on South African Consumer Lifestyles

THE NEW UNCERTAINTY...

During the first half of 2020 the **Coronavirus** did not only spread around the world like wildfire, it also brought previously unimaginable challenges to the world's healthcare systems, wreaked havoc on financial markets and introduced an existential fear and feeling of apprehension to people everywhere. The current situation in South Africa is no exception, and we are caught in a time warp of uncertainty about the future.

A SHAKY START...

Not that South Africans were **any more secure** before this... only six months previously news bulletins were dominated by the persistent drought, the quality and the quantity of limited water resources and Eskom's "load-shedding". Moreover, the election in May 2019 left the country with several questions to answer about democracy, leadership and the level of trust in political parties.

THE NEED...

In this context there is need for an in-depth **understanding** of the people of South Africa - their lifestyles, needs, aspirations and coping mechanisms. This will provide an opportunity for all stakeholders to play their part in meeting their needs through products and services.

BRIDGING THE KNOWLEDGE GAP...

A few years ago Ipsos undertook, together with the then Unilever Institute at the University of Cape Town, the very successful "African Lions" project – for the first time exploring the opinions, lives and livelihoods of the middle-class populations in ten important cities in Africa (outside of South Africa).

ON-BOARDING SOUTH AFRICA...

Now "Mzansi Roars" will focus on the total adult population in South Africa and so open possibilities for much deeper analysis of different consumer and citizen groups in the country. (The scope will thus be much bigger than the "middle class".)

CONSIDERING OUR CHALLENGES...

We know that some of the major issues in our country include joblessness, poverty and the huge gap between rich and poor – the gini- coefficient. However, very little tangible and workable information exists to help bridge these development gaps, although every business in the country is confronted by these issues.

WHERE THE REAL PEOPLE ARE...

Mzansi Roars will employ a "bottom-up" approach of building on the experiences of real people and aggregation of findings to assist businesses and institutions with rich information to make a positive contribution to the South African economy and future.

THEMES ADDRESSED BY MZANSI ROARS

The survey will measure and generate learnings in numerous areas including:



Demographic profiles and household structure



Nutrition and Health



Products and services used



Individual and household financial reality



Interaction with technology and media consumption patterns



Household and individual budgets; share of wallet



Psychographics, lifestyle and aspirations



Shopping and spending



Segmentation

To become a partner in this exciting project and get access to the unique insights and benefits of the study will cost R350,000*

THANK YOU!



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GAME CHANGERS



TECHNICAL DETAILS: ALL STUDIES REFERRED TO IN THE DECK

South Africa: Between a rock and a hard place

| Study Name | Interviewing Methodology | Sample size | Fieldwork/ publication dates | Margin of error* |
|--|--------------------------|---|---|--------------------------------|
| Ipsos SA Covid-19 tracker, April 2020 | Online** | 1,000 | 20-23 April 2020 | ± 3.1 percentage points |
| Ipsos Essentials series | Online | 16,000 interviews per week in 16 countries (1,000 per country) | Every week during May and June 2020 | ± 3.1 percentage points for SA |
| Ipsos Signals webinar series (specifically the webinars in June and July 2020) | | | Published around twice a month since March 2020 | |
| Ipsos Cost of Living | Online | 17,997 interviews in 26 countries (sample size in SA = 500) | 22 May – 5 June 2020 | ± 4.5 percentage points for SA |
| Ipsos Global Indicators | Online | Around 18,000 interviews in 26 countries (SA = 500) (published monthly) | January – July 2020 | ± 4.5 percentage points for SA |
| 24.com/Ipsos study | Online | 52,287 | 25 May – 4 June 2020 | < 1 percentage point |
| Ipsos Global Advisor (specifically What Worries the World, July 2020) | Online | Around 18,000 interviews in 26 countries (SA = 500) | Every month of 2020 | ± 4.5 percentage points for SA |
| Ipsos SA SMME Syndicate | Personal, Face-to-face | Qualitative phase of Study | June and July 2020 | |

WE ARE HERE TO HELP YOU WITH THE ANSWERS

SMME Syndicate: Understanding the impact during COVID

Understanding the role and needs of SMEs in Covid-19. How SME's in South Africa have been impacted by the pandemic and what measures can be put in place to support them.



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Mzansi Roars: A study on South African Consumer Lifestyles

A study on the South African Consumer Lifestyle. Mzansi Roars will focus on the total adult population in South Africa and so open possibilities for much deeper analysis of different consumer and citizen groups in the country.



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Closer to Customer: Qualitative immersive experiences

We have designed a series of immersive experiences with a set of customers in order to be part of their lives and see how they navigate through constant change. Be there and live the change with them.



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**BE
SURE.
MOVE
FASTER.**

GAME CHANGERS



ABOUT IPSOS

Founded in France in 1975, Ipsos is now the world's third largest market research company in the world, present in 89 countries and employing more than 18,000 people.

For over 40 years, our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. We serve more than 5000 clients across the world with 75 business solutions.

Ipsos is listed on Euronext Paris- Ipsos is listed on Euronext Paris. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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GAME CHANGERS

In our world of rapid change, the need of reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder.
Ultimately, success comes down to a simple truth :
You act better when you are sure.