

POST **LOCKDOWN**

Namibia

Research Context COVID-19 and the lockdown (in its various levels) have had - and continue to have - a

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massive impact on South African society. Our objective with this study was to attempt

to quantify and understand the general perceptions towards marketing. We recruited respondents for our online survey via our online panel and social media platforms, This achieved a

Respondents

good representation of key demographics across adult (16+) South Africa, bearing in mind that being an online survey, participation was via self-selection and universe was limited to those active online. Fieldwork:

Survey ran 2 June till 23 June 2020

Please Note: Continued research is critical to achieving a current understanding. If you require more focused demographic filtering or more current data, please contact us to discuss further. The views in this study represent those of our respondents' and do not constitute our personal or

company views. Please contact us if you are going to publish this data in any form of publication. LOCKDOWN IMPACT OVERVIEW

As expected, most people anticipate "spending less in general" under the current circumstances, and this is across age categories. Interestingly, it is the highest income bracket (>R30k) that has the highest % of people who say they are going to be cutting back on spending.

Spending Patterns

25-39 40-54 Age 16-24 Overall Sample size

Going to spend less in general Going to spend more in general Not changing 8% 8% habits **Household Income** Say COVID-19 and the lockdown have had a negative impact on their finances

Respondents were asked to select multiple factors that concerned them during this time

LOCKDOWN CONCERNS

stated their spending is going to decrease post lockdown

Respondents were asked to select the most concerning factor from original selection

Personally losing their income

were concerned about job losses worried about Economy

55+YO = 2 | >R3Ok = 2.7 all

leaning towards wealth

concerned about Family member getting the virus

contracting

Which is more concerning? The spread of concerns ties in to the "health vs wealth" trade-off. Overall, on average the scale tips SLIGHTLY in favor of health. Scores for older and wealthier respondents tended to lean towards the "wealth" side, while those for lower income households leaned towards health.

Top three Shopping

concerns during lockdown:

Price increase

Queues outside stores

Trolley/basket contact

unlikely all to be linked to the price-gouging that was prevalent during early lockdown), heading the list of concerns for both periods.

Government approval is linked to age and household income (and drops with both). At the time of the survey, frustration with lockdown regulations was rising with the vast majority of our respondents agreeing that lockdown was a good idea initially, but only half agreeing that it

should still

be in place

end July

August

<R5k 2.9 vs >R30k 2.1 | 16-17YO 3.0 vs 55+ 1.9

of SMOKERS think the cigarette

September

LOCKDOWN IMPACT OPINIONS

Impact on wealth

It is interesting to note that when multiple selection is allowed, the top three concerns selected are all about other people; however, when only one choice is allowed, the biggest group of respondents defaulted to a personal concern - about their own jobs.

Impact on health <R5k = 3.3 | leaning towards health **Top three Shopping**

concerns post-lockdown:

Price increase

Trolley/basket contact

Queues outside stores

Finances are clearly top of mind again when considering what concerns shoppers currently and post-lockdown, with price increases (which are

Respondents share their opinions on how government is doing

think the Government is

doing a good job

Economic Recovery

of our sample

General Findings

brands.

think advertising

should be more light-

hearted at this time

86%

are supporting more

local brands now

Brands who Impressed

vwLegalwise Shoprite

Humor competition

Please note that demographics were not specifically targeted. If you would like to discuss profile targeting and reporting please contact us.

Brands that have impressed (open-ended)

should continue. More than half were of the opinion that Level 3 should be over by the end of July. **Government Regulations**

When should lockdown end? Respondents predict lockdown restrictions should be lifted by ... Level 3 Level 2 Level 1 Level 5

54%

of NON-SMOKERS a min. a... cigarette sale ban was a good idea of NON-SMOKERS think the

have her brands going quiet

58%

think it's a

bad thing

have noticed favourite

good thing

think brands should

encourage giving to

the Solidarity Fund

16-17YO 83%

18-24YO 71%

High Confidence

56%

think lockdown was the right thing to do at the time think lockdown is the right thing to do now

Low Confidence

The confidence level of our economic recovery with our respondents showed ...

sale ban was a good idea **BRAND COMMUNICATIONS**

What about the Cigarette ban?

COVID-19. This is evident in most people who have noticed brands going quiet considering it to be a bad thing, and nearly two in three agreeing that brands should be marketing and promoting MORE at the moment. The apparent contradiction between high agreement with both the concepts of referring to COVID-19 and distracting from it probably stems from the questions not being category-specific; references to COVID-19 are more appropriate to some categories than others. Overall though, it seems those on both ends of the age spectrum are the least likely to be open to COVID-19-related communications, BUT young shoppers are

have switched

brands as a result

Overall, brands seem to have permission to communicate, and to refer to

also the most approving on encouraging donations to the Solidarity Fund.

The claimed shift towards local brands creates opportunities for such

61% 73% think brands should think brands should think ads should be marketing and be distracting us be referring promoting more from COVID-19 to COVID-19 42% of 16-17YO 38% of 55+

13%

have been impressed by a brand over this time Samsung McDonald's Koo Simba Jet SAB Checkers

Brands should be... What should brands be doing now (open-ended) Discounts Promotions

Don't go quiet with your audience; direct your communication towards solidarity and support. Connect with the community and make an effort to support local communities. Balance your Covid-19 message and be careful of ignoring it completely. Consider how older content could reflect that you are ignoring the pandemic.

cheaper Commence Encouragemen

Age % **16-24** 40-54 25-39

Employment Status % 28

Unemployed Learner/Student Working

categories please click the button to request a download link.

FMCG Retail

Liquor Retail

can name a brand that has disappointed them over this time Brands quiet over lockdown Brands that you noticed going quiet during lockdown (open-ended)

Brands should not be... What should brands not be doing (open-ended)

Its a tightrope for brands at the moment Try to avoid increasing prices wherever possible as shoppers are currently hyper-aware and in many cases are shopping by price. Pricing presents a financial challenge at all levels and is going to require the best efforts of an organizations pricing strategists. Innovate how you can offer value to shoppers and make them aware of this value. Caution to avoid excessive hard sells. If your brand is local, let people know. If it is not local, then look to see how you can support local in some way. RESPONDENT PROFILE

Pre-Lockdown HH Income %

R5,000 - R10,000

Western Cape

Other

Clothing Industry

Vehicle Maintenance

#

21

R10,000 - R20,000

Province %

Gauteng

Eastern Cape

< R5,000

> R30.000

26

R20,000 - R30,000

42

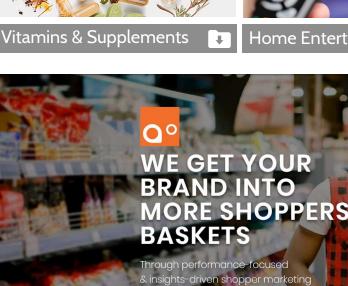
Retired

Home Improvement

High Value Appliances

FURTHER LOCKDOWN IMPACT RESEARCH

We have compiled a host of other infographics based on our lockdown research. If you would like to receive a free copy of any of the below



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conversion.



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