

**THE  
COVID-19  
CONSUMER**

*Research conducted up to 28 April 2020*



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# South Africa's evolving COVID-19 consumer

We set out to identify what South Africans think about COVID-19, its impact on their lives, how they feel about the future and how they believe brands should now be behaving.

This will be part of ongoing tracking of how the consumer's state is evolving because of the pandemic, and therefore how their needs and wants are shifting to drive new or old preferences for brands.

## Methodology and sample

780 South Africans completed the online survey. The sample included a broad range of monthly household income groups.

R0 - R4 999	R5 000 - R9 999	R10 000 - R14 999	R15 000 - R19 000	R20 000 - R49 999	R50 000+	PREFER NOT TO SAY
27%	13%	9%	6%	21%	12%	13%

Respondents were recruited through our existing consumer panel, influencer network, and promotion on Facebook and WhatsApp.

Fieldwork was conducted over the lockdown period from [26 March until 28 April 2020](#). The survey of 24 questions included 6 open ended questions to gain an unprompted and deeper understanding of people's mindsets and views based on how they expressed themselves.

# Key outtakes

- The Government was seen to have performed their role very well and ensured that the majority of South Africans were largely in agreement with the Lockdown measures. Only 10% felt that the Government's response was lacking and 16% felt that it is too late, driven by lower income respondents. There is unity across the board on the acceptance of this due to the severity of COVID-19.
- A third of individuals with a monthly household income less than R5 000 a month believe contracting COVID-19 will no longer be a problem by July 2020; however the majority of respondents agree that it will be much longer.
- Concerns around income loss/retrenchments and the economy are currently more top of mind than the spread of the virus. During lockdown the direct consequences of these financial losses were immediately felt by many. Concerns included increased inequality, hunger, homelessness, violence, crime and civil unrest. A health pandemic of this nature hasn't been experienced by this generation and is difficult to imagine. The impact on loss of life was not felt at the time of lockdown by many.
- The majority of South Africans believe this pandemic will have a negative impact on South Africa's future, while still feeling more optimistic about their own.
- The long term positive impact is likely to be increased social cohesion, empathy and respect for frontline workers. Some are forced or are choosing to reevaluate and reinvent themselves.
- Half of consumers are spending less money, both because they have fewer opportunities to spend and reduced income. This is skewed towards upper income brackets.
- However, many people with lower household incomes had to spend more money at the start of lockdown, with the majority of this spend being on food groceries and household essentials.
- The majority of people are baking and cooking more, but this is contrasted with many people who are going without food and struggling to pay rent. Cleaning, spending time with family and creativity has increased while people are limited to the confines of their homes.
- Consumer recommendations to brands: Continue being in consumers' lives, reaching them on channels that they're spending more time on. Show empathy, take action to prevent the spread of COVID-19, support the less fortunate and don't take advantage by increasing prices or pushing sales. Strategy needs to be relevant to COVID-19 times, yet distinctive to your brand and USP. Winning brands include grocery retailers (lead by Pick 'n Pay) and are detailed in the report.

**How  
consumers  
feel about  
COVID-19 and  
its impact**

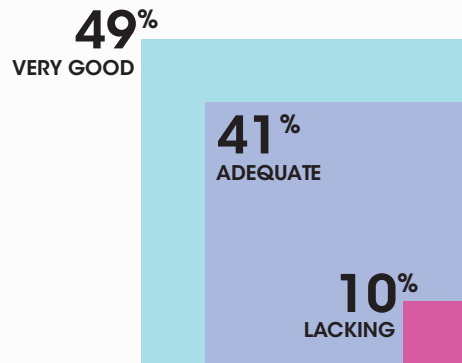
## Is COVID-19 a serious health threat?

There is consensus with 84% agreeing that COVID-19 is 'an incredibly serious pandemic'.

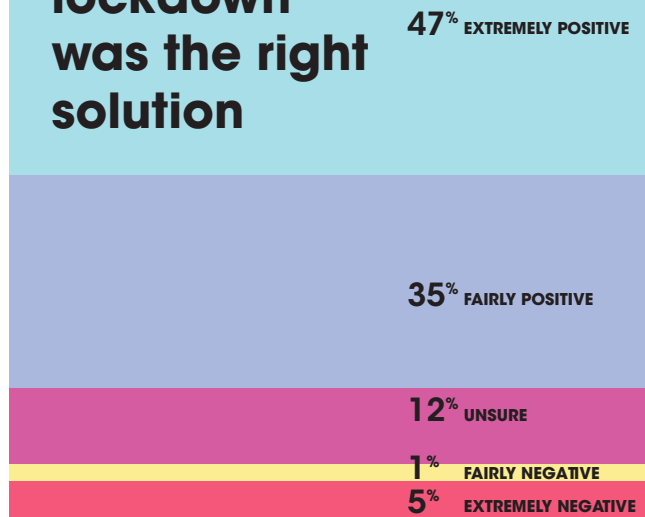
## How has the Government responded?

Most believe that the Government has performed their role well and that lockdown was required. Very few disagreed with lockdown being put in place. However, lower income levels (Less than R5 000) were over-indexed in saying the Government responded too late (at 23%).

### Adequacy of Government response



### Feeling that lockdown was the right solution



### Timing of Government response



What is noticeable is that the message has not been weaponised, politicised or challenged, which is unlike other countries where belief in COVID-19 has become a political or ideological debate. This points to strong, clear communication and decisive action.

This has left many South Africans feeling hopeful that our Government can now fix the problems we as a country face and create a new era.

***"The Government reacted fast enough, saving so many lives, unlike in other countries. I believe that the moment of economic transformation renewal is upon us and we should not let it pass."***

*(R0 - R4 999)*

*"Everybody seems to be focused on the immediate economic impact that the pandemic has had, but I believe the Government's response shows that we are more than capable of developing as a country."*

*(R0 - R4 999)*

*"Our economy will be a disaster, but Cyril will be able to ensure the leadership reigns properly."*

*(R50 000+)*

*"I believe that more urgency will be put towards fixing the extreme inequality in our society. I also think that every effort will need to be made to fix the economy and our politicians will be more driven to work together on this."*

*(R20 000 - 49 999)*

*"There will be greater collaboration between the private and public sector. I am hoping there will be a paradigm shift in the way we manage and support SMEs and a greater alignment and tolerance on racial differences and a focus on fairness for all like education, housing and closing the equity gap."*

*(undisclosed)*

# When will the threat of contracting COVID-19 no longer be a problem?

	R0 - R4 999	R5 000 - R9 999	R10 000 - R14 999	R15 000 - R19 000	R20 000 - R49 999	R50 000+	TOTAL
<b>IN 1 MONTH - BY MAY 2020</b>	9%	3%	3%	0%	1%	1%	4%
<b>IN 3 MONTHS - BY JULY 2020</b>	24%	10%	17%	8%	7%	4%	13%
<b>IN 6 MONTHS - BY SEPT. 2020</b>	25%	36%	33%	20%	25%	13%	26%
<b>IN 9 MONTHS - BY DEC. 2020</b>	14%	26%	15%	16%	21%	21%	19%
<b>IN 12 MONTHS - BY APRIL 2021</b>	12%	9%	18%	22%	19%	23%	17%
<b>LONGER THAN 12 MONTHS</b>	15%	15%	14%	33%	27%	37%	22%

Most South Africans believe that it is going to take 6 to 12 months for us to not worry about COVID-19 anymore. The lower income felt that this would be sooner, with one third stating it would no longer be a problem by July 2020.



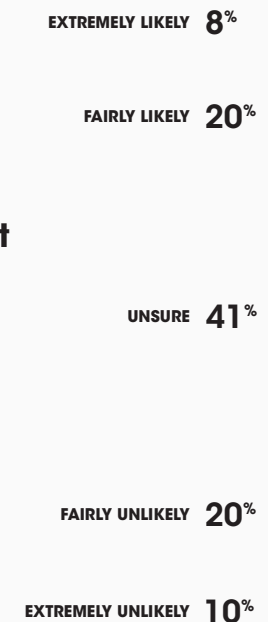
# Who will get infected?

Most South Africans believe that the majority of the country's population will become infected with COVID-19, however, true to human nature, they don't believe they themselves will contract the virus. Women are slightly more confident that they will not become infected with men slightly more confident they will become infected.

## Estimated proportion of SA population likely to contract COVID-19

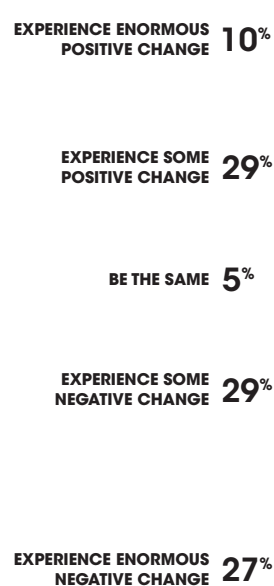
1%-5%	7%
6%-10%	11%
11%-20%	12%
21%-30%	20%
31%-50%	20%
51%-70%	22%
71%-90%	7%
91%-100%	1%

## Perceived likelihood to contract COVID-19



# What will the long term outcome be for South Africa, post COVID-19?

South Africa will not be the same. 56% believe that COVID-19 will have a long-term negative impact for the country, while almost 39% believe it will bring about long-term positive change.

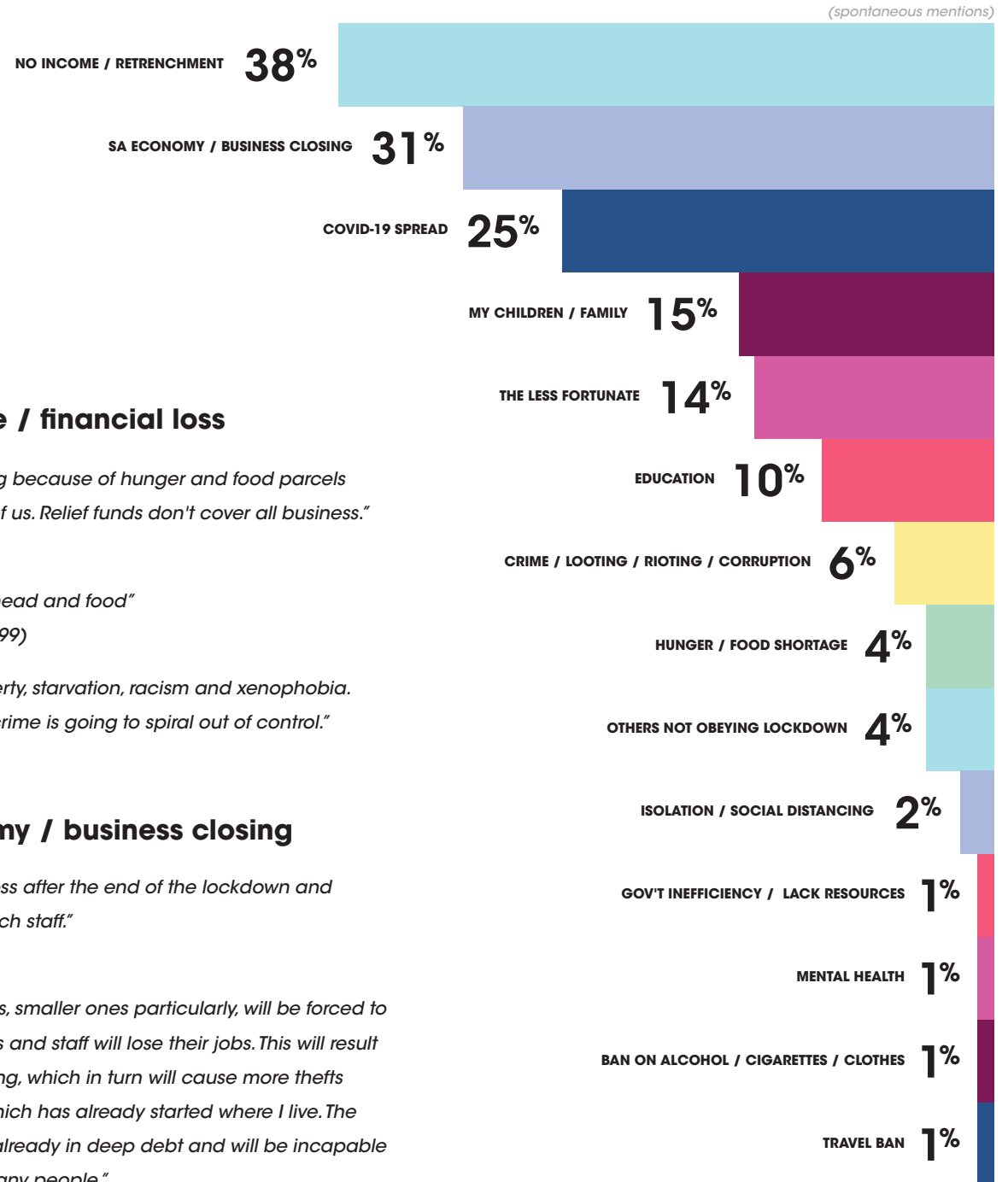


*"Economic fall out and another Great Depression. We may start referring to BC and WC (Before COVID-19 and With COVID-19)."*

# What are South African's biggest concerns?

The main concerns are centered on financial loss and the economy, with the focus expressed as job losses, the closing down of businesses and therefore also the direct consequences of these losses, which would be increased inequality, hunger, homelessness, violence, crime and civil unrest.

Half of households earning R5 000 - R9 999 expressed loss of income as their biggest concern. This group is likely to receive less financial assistance from the Government, such as food parcels or grants. New Government regulations protecting tenants from eviction don't necessarily apply to township backyard dwellers and payment holidays don't apply to stokvels.



## No income / financial loss

*"People are dying because of hunger and food parcels don't cover all of us. Relief funds don't cover all business."*  
(R0 - R4 999)

*"A roof over our head and food"*  
(R10 000 - R14 999)

*"Increase in poverty, starvation, racism and xenophobia. Poaching and crime is going to spiral out of control."*  
(R0 - R4 999)

## SA economy / business closing

*"Having a business after the end of the lockdown and having to retrench staff."*  
(R50 000+)

*"Many businesses, smaller ones particularly, will be forced to close their doors and staff will lose their jobs. This will result in people starving, which in turn will cause more thefts and murders, which has already started where I live. The Government is already in deep debt and will be incapable of feeding so many people."*

*"I found work in March, but can't start until after the lockdown. Therefore, no income for food, rent and electricity, I will be in so much financial trouble with payment arrears, I might lose my car and have to leave where I'm renting. I can't claim UIF since I've technically got a job, but since they haven't paid me to start yet, there's no UIF contributions. I don't think Government food assistance will be given to me."*  
(R5 000 - R9 999)

*"Financial recovery, single income with no income generation during lockdown, having to choose between paying rent or eating. There has been no relief from the landlord, so I pay rent and go hungry. The same applies to my adult children not living with me. My greatest concern is for my children. At my age if I don't recover from this it would be terrible, but if my children don't recover from the financial crisis it would be disastrous."*  
(R10 000 - R14 999)

## Health concerns were raised after financial and economic impact

The entire reason for the Government's drastic response is being forgotten as the success of slowing the spread has caused threat-distancing ("I don't see people getting sick, so I am not scared of it") and moved the focus onto the immediate and tangible effect of loss of income or livelihood ("I may lose my job so I am more scared of that").

*"About the health of fellow South Africans and the rest of the world."*

*"This virus is really scary, many have already died from it. I fear that we are not getting the correct stats and that we are in deeper than we are led to believe. I'm scared for the economy. I'm concerned about my family."*

## Mental and emotional stress

Many South Africans are struggling with the mental and emotional toll of handling the challenges brought on by the pandemic, with the focus being on loss; loss of agency, movement, freedom, income, health, life.

*"I am feeling angry and frustrated as my ability to fend and provide for myself have been taken away from me."*

*"I am stressing and making my immune system weaker by not knowing where money to pay rent and food will come from. Being white, I'm not able to claim food parcels. Depressed and higher suicide risks."*

*"If this goes on any longer people will go crazy."*

# Should we save lives or save livelihoods?

Opinions varied at this early stage of the debate as to which is more important; Lives or Livelihoods? The growth of each camp will be determined by which is most visibly impacted over the coming months.

## Lives

> livelihood

We need to sacrifice our financial and economic well-being now to 'flatten the curve' and save lives.

*"Save lives even if it affects the economy. We can build the economy again, but lost lives cannot be recovered."*  
(R0 - R4 999)

*"The economy will suffer even more than how we are suffering right now. Investment values keep dropping. A lot is at stake but a lockdown is better than this pandemic killing lots of people."*  
(R50 000+)

## Livelihood

> lives

Poverty and starvation will kill more South Africans than the virus so protect the economy first.

*"I think lockdown is a bigger problem for people than COVID-19. We need to weigh up poverty with the extent of the virus. My opinion is that poverty will kill more than COVID-19."*  
(R50 000+)

*"The damage done to our economy with the fact that most South Africans will still contract the virus and die."*  
(R50 000+)

# Hope for a better future?

39% were hopeful that this may lead to a positive impact on South Africa's future, through increased social cohesion, reflection and addressing inequality and the socio-economic crises.

## Positive long term impact

(Spontaneous mentions):

- 6% Social cohesion, empathy and respect for frontline workers
- 6% Reevaluate and reinvent self
- 6% Trust in the Government's capability
- 4% Policy change to improve infrastructure and socio-economic imbalance
- 3% Adapt processes and increase technology
- 3% Increase hygiene and responsibility

## Social cohesion had somewhat higher spontaneous mentions among people earning R50 000 or more (14%)

The pandemic has brought out the best in some communities and neighbours who now have gotten to know, support and connect with each other in ways they had never done before (middle class upwards were rediscovering what community and being a neighbour can mean).

There is a desire to feel a sense of togetherness and to be part of the solution. There is an increase in the exposure and awareness of inequality and a call for donations and support.

*"The exposure of the inequality of our society should spur some positive change."  
(R20 000 - R49 999)*

*"We also need to be kinder to each other, focus on what really matters and deal with unemployment and poverty. I hope South Africans will join together to fix our problems."  
(R50 000+)*

*"People are uniting for a common good."  
(R50 000+)*

# South Africans are using the time to reflect and appreciate different parts of their lives

*"It will not only curb the rapid spread of the virus, but will also allow people to reinvent themselves in our new world. Technology will take centre stage and everyone will have to start learning new ways of integrating themselves in our new world."*

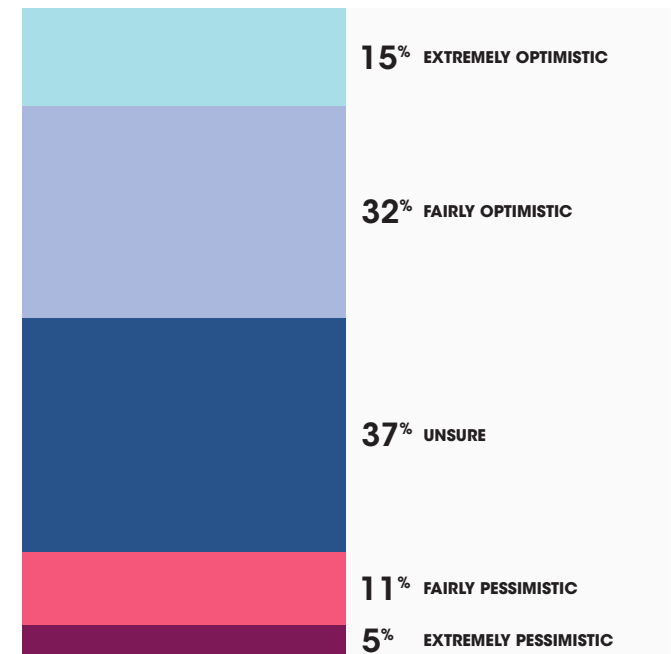
*"The Coronavirus pandemic is definitely an eye opener in our home! We took this time to reset from the everyday Jo'burg chaos. We realised that we can find a good and healthy balance between work and spending time with our loved ones. We definitely have a more positive approach now."*

*"People will see more value in the more important things in life."*

# How do South Africans feel about their own future?

Most South Africans believe that COVID-19 will negatively impact South Africa's future, but surprisingly almost half feel optimistic about their futures.

The youth (18-24) were more optimistic about the future as they gave lower mention of financial and economic concerns. Many are not in the job market yet and have time to bounce back.

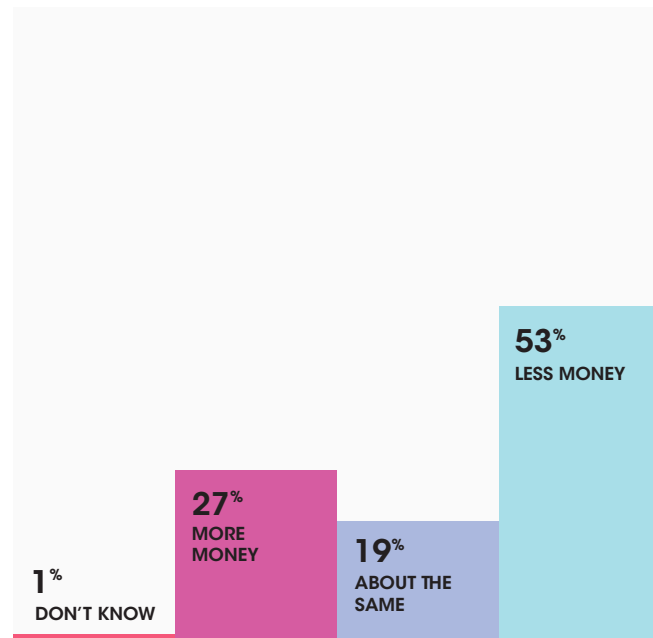




**Changing  
behaviour**

# How are consumers spending their money?

Half of consumers are spending less money, both because they have fewer opportunities to spend as well as the need to save money due to reduced income.



However, the lower income levels had to spend more money at the start of lockdown, with the majority of this spend being on food groceries (88%), household essentials (59%), medical supplies (33%) and entertainment / internet (32%).

	R0 - R4 999	R5 000 - R9 999	R10 000 - R14 999	R15 000 - R19 000	R20 000 - R49 999	R50 000+
MORE MONEY	43%	22%	23%	33%	16%	13%
ABOUT THE SAME	14%	21%	18%	24%	23%	16%
LESS MONEY	42%	54%	55%	43%	60%	70%
DON'T KNOW	1%	3%	5%	0%	1%	1%

## What people are doing more of?

These responses ranged from the indulgence of baking to the painful reality of starvation. A discernable pattern emerged across demographics, but in different ways.

**Cooking**  
**Reading**  
**Creativity**  
**Cleaning TV**  
**Family Time**  
**Exercise Sleep**  
**Eating Social Media**  
**Praying Gardening**  
**News YouTube Studying**  
**Music Mental Stress Learning New Skills**

*(Spontaneous mentions)*

The driver of what people are doing more of is based on having more time within the limited confines of their homes. People are therefore getting more creative, doing more themselves in and around their homes – cooking (18%), reading / creative activities (18%), cleaning (16%) and spending more time with pets and family (16%).

Cooking and recipes were the top fastest growing topics on Instagram worldwide. Locally, there has been a growth in local food influencers; for example:

### **Luyanda Mafanya** *(CookingwithLuyanda)*

Luyanda has seen a growth of +15 257 followers in the past 4 weeks, a 16% increase. During Lockdown Luyanda's content has been solely focused on baking and cooking recipes that you would usually get from your favourite restaurant.

### **Lameez Abrahams** *(JustBaked)*

+2 794 followers in the last 4 weeks, a 6% increase. Lameez's content has been mostly baking, which she amplified during the lockdown period.

### **Neo Nontso** *(Dine With Neo)*

+30 243 followers in the last 4 weeks, 14% increase. Before lockdown Neo had announced that you could now order her food on UberEats. Like many other businesses Neo is extremely affected by the lockdown. Neo's content changed to becoming more engaging and lockdown focused e.g. How to make your own StreetWise 2.

## What people are doing less of?

People are doing less of the expected; socialising, drinking and being outdoors.

**Socialising**  
**Exercise**  
**Shopping Alcohol**  
**Smoking Travelling**  
**Working Takeaways**  
**Walking Sleeping Spending Money**  
**Eating Reading Gardening Makeup**  
**Hobbies Beach Mental Stress Showering**

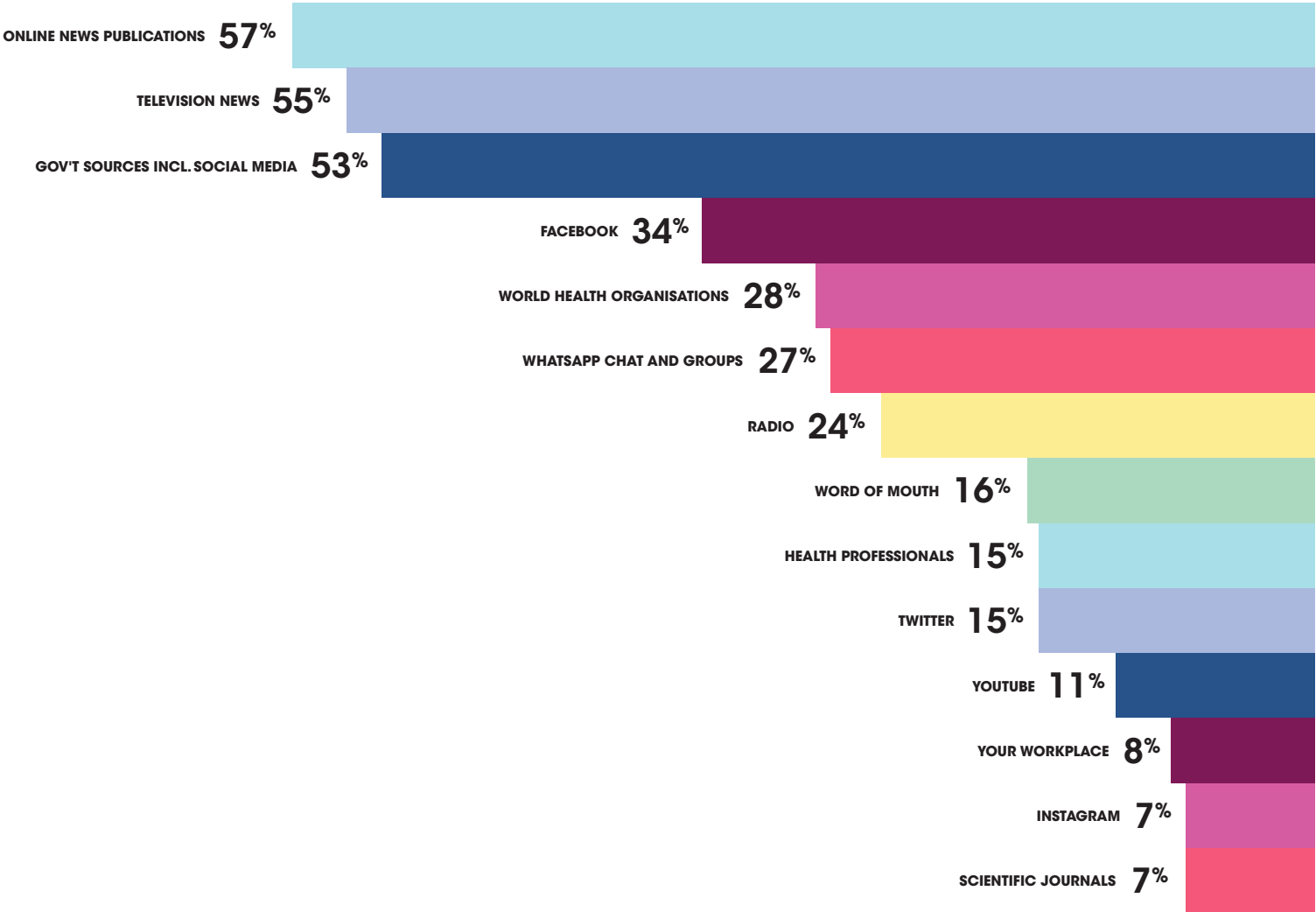
*(Spontaneous mentions)*

The higher income groups were exercising out of home a lot less (29%). A fact mainly attributed to the closing down of gyms, exercise venues and the banning of outdoor and group sports.

*"Due to lockdown I have not been running and hiking."*

*(R20 000 - R49 999)*

# Sources regularly accessed for COVID-19 information



People are getting information from 3 to 4 different sources. In line with expectations, older people are consuming more traditional media and younger people more digital.

The [www.gov.za](http://www.gov.za) site visits have spiked by 65% since Feb 2020, showing that the public are being responsible about gathering accurate information.

**How should  
brands be  
behaving**

# Continue being in our lives

What was surprising, but very evident, was that consumers expected and wanted brands to continue advertising with 37% spontaneously stating this, while only 8% felt the other way. Those who said brands should not be advertising used the reasoning that these budgets should rather be invested to help consumers (cheaper product offering or responsible actions used to assist SA against COVID-19). **The expectation is still that brands should be active and should be useful, whether to them, the actual consumer, or the general public by large.**

It is clear that brands play a big role in consumers' lives and are more than just the intrinsic product benefits they provide.

*"I think this is the time to tell stories of your brand/company... take us behind the scenes, bring us in. This is the moment to sit and truly engage with the people who follow you and really hear from them."*

*"Keep things light hearted & entertaining. Be as real & as transparent as possible (I think now's the time where we'll get to see who actually cares and who are diehard capitalists). Put their staff and consumers well-being first."*

*"Don't spend money on ads, spend money on action and campaigns to make a difference to businesses and people in need. This will result in a far more positive feeling towards the brands and likelihood to spend more with them."*

# Brands can show their support through supportive pricing strategies

*"Be less about the profits and more about helping people - that kind of attitude attracts loyal followers."*

*"They should consider that **we are in as much of a financial crisis as we are in a pandemic.** They should behave as normal, do what they can as a company to help, adjust their pricing and not sell/promote their products and services as often as they normally would do during this time of crisis."*

*"I think that they must consider that the average man on the street will have absolutely no disposable income."*

*"The worth of the brand for me is determined in terms of their social responsibility. Brands depend on consumers and it is time that they showed their civic responsibilities."*

# Responding to how consumers are feeling

Consumers have been dealt a great and unexpected blow and are largely feeling overwhelmed and hopeless across all demographics. Their relationship with brands is such that **they expect brands to show compassion, empathy and sensitivity in how they treat and respond to consumers moving forward.** They are looking for guidance, leadership and support. This will provide business with a challenge to balance the short term capitalistic instinct of driving sales and profits with the long term brand building view of supporting their consumers.

*"Empathy is important, and a high level of cultural relevance and sensitivity."*

*"As established brands they have a voice, and they should use that power to come up with creative ideas that are positive and supportive."*

*"As we know, consumers are especially sensitive right now to anything that looks like a brand is exploiting the situation. So I think brands need to be incredibly careful. There needs to be some sense of connection to how they advertise. All of a sudden the bigger celebrities are not a focus point and instead us normal and ordinary people are becoming heroes. I think brands attaching to that human element could go a long way."*

*"Be human. It's down to basic needs now. No frills. Kindness and empathy will be remembered."*

# A brand's response needs to be as distinctive as their USP

Consumers have been inundated with uplifting messages of understanding and support from brands. The first few made an impact, the followers became clutter. Brands need to move away from generalised clichés and into building communication and offers based on their unique brand USPs.

*"Show real appreciation of the impact this is having. Price reductions, ways to practically help customers. No more 'we have your back', mass mailed, insincere letters - they are meaningless."*

*"I hate the way brands have responded to this. While I know there is a place for business to evolve during a trying time, more companies are capitalising off of this than anything. They have lost their sense of purpose. So, I believe brands should be thinking more about the communication they are sending out there as opposed to being so reactive."*

*"Brands should come together to assist people in need, whether it is food or musical and art platforms, online lessons etc. Right now is the time we need to work together because every single person is affected."*

*"A large percentage need to focus on the role they can play in people's lives and not get too caught up in trying to have a purpose relevant to COVID-19."*

*"Brands should be sensitive to the current times and focus on delivering light-hearted and highly-targeted content [not ads] to build meaningful connections with their consumers."*

*"I think food brands should realise that everyone is cooking so much more home-food for the family (no quick packed sarmies for lunch!) so they can maybe suggest 10-minute meals using their products. I think food brands can highlight their immune-boosting ingredients. Brands can offer bulk specials and emphasise how it will cut down on grocery store visits."*

*"Now is the time to win new customers, provided you provide solid value. We have seen there are other means of sourcing goods and products. You need to become even more convenient and improve your value offer."*

# Brands should be their better selves

Consumers are holding brands to the highest possible standards. Maybe more so than what is financially possible; but consumers do expect these brands to behave with a responsible 'humanity first' approach. Many consumers spoke of brands first protecting their own staff and saving jobs within their companies, being transparent and clear in how they have been impacted and explaining measures they would be taking.

Over the course of the COVID-19 pandemic, a brand will not only be judged by how it responds, but also how the business behind the brand responds (it needs to be seen that profit is being made to protect the interest of the consumer or staff, rather than the interests of the shareholders or directors.) We will need to wait to see if this will make a lasting impact and if what brands do now, will resonate for years in the post-COVID-19 era.

*"Assist where they can, behave in the best interests of the communities that have supported them over all the years."*

*"Profiteering at a time like this is like shooting fish in a barrel. We all need to get through this in one piece, and that also applies to our finances."*

*"I definitely think advertising has to stay up to date with the latest developments as they happen. This isn't the time for advertising creams to make you look younger. It is the time to educate people who aren't getting educated because of their lack of knowledge of how to use online learning. Perhaps advertising should be geared towards teaching this."*

*"I feel brands should be cognisant of the severity of the issue, while not overtly leveraging Coronavirus for financial gain. Respond with solutions to the world's new problems. Put their money where their mouths are and work to make a positive impact wherever possible."*



# Advertising channels

Consumers are expecting brands to adjust their methodologies quickly to meet them in the environments where they are now - with **going fully digital and providing ecommerce solutions** the two predominant expectations as consumers want more relevant engagement and easier purchasing.

*"Digital marketing and social presence are now fundamental and almost a must-have strategy for almost every business/brand."*

*"They should utilise social media to stay in touch with their consumers because that's where most people spend their time."*

*"Most churches are now on social media and using digital platforms and that motivates our older parents to know how to use it."*

# This should be obvious, but if not, don't take advantage

Any brand that is seen to take advantage or treat consumers unfairly now, may reap **long term brand perception and equity consequences** (needless to say, future purchases will be impacted).

*"As we know, consumers are especially sensitive right now to anything that looks like a brand is exploiting the situation. So I think brands need to be incredibly careful."*

*"Ethically, compassionately and transparently. They should not exploit nor capitalise on the Coronavirus for their own profitable gain but should also focus on the overall well-being and best interests of the consumer."*

# Consumers are becoming more self-sufficient

Consumers are becoming more sustainably minded, **forced into needing to be both frugal, creative and self-sufficient.** This will cause two opposing shifts; consumers looking more for the 'parts' than the finished product as they enjoy the process as much as the end result or those who gain more appreciation and desire for the final product and will invest more in receiving this, without the pain of doing it themselves.

*"Trying to become more self-sustainable by growing my own veggies."*

*"Doing more cooking and baking new recipes from scratch."*

## Brands that were mentioned

The brands that had the most spontaneous mentions were the ones that consumers engaged with most and those that had taken positive steps towards protecting their consumers as well as making a positive impact within the community. Action spoke louder than words.

Across the board, Pick `n Pay led with 41 mentions, closely followed by the other grocery brands.

Brand and no. of mentions	Theme	Respondent quotes
<b>Pick `n Pay 41</b>	<p>PnP was noted for their active response in helping not only their customers but also their staff with a focus on safety, hygiene and protection.</p> <p>They were involved in donations, food banks, supporting essential workers, the poor as well as pensioners.</p> <p>They were acknowledged for keeping their prices low and for being fair.</p> <p>They had time-relevant advertising, showing empathy and trying to reduce panic buying.</p>	<p><i>"Reacted very fast to curb the spread of the virus. They installed protective shields to protect their employees and stocked up on all essential goods. The voices of their customers were heard and matters raised were resolved. They have also introduced self checkout."</i></p> <p><i>"Opening a line for essential workers."</i></p>
<b>Woolworths 35</b>	<p>Woolworths introduced active measures to curb the potential spread of the virus as well as showing empathy in the tone of their advertising and communication.</p>	<p><i>"Introduced contactless shopping with their new drive through system."</i></p> <p><i>Retail brands such as Woolworths (and Checkers) have adapted their messaging quickly to a tone of empathy.</i></p>
<b>Checkers 23</b>	<p>Checkers was noted for their protective efforts, their involvement in donation schemes as well as showing empathy in their messaging.</p>	<p><i>"The big supermarkets, like Checkers, who have hand sanitisers at the doors for us."</i></p> <p><i>"Checkers have donated a lot of money."</i></p>

Brand and no. of mentions	Theme	Respondent quotes
<b>Spar 21</b>	Spar was noted for their safety precautions, the discounts they offered and the support they provided for the disadvantaged.	<p><i>"Doing a great job in keeping their stores sanitised and well maintained."</i></p> <p><i>"Still have massive discounts."</i></p> <p><i>"Started a drive to buy food and deposit it in trolleys that are parked in store to give to the less fortunate."</i></p>
<b>Shoprite 19</b>	<p>Shoprite was mentioned for how they looked after their employees, not raising prices and ensuring products were available.</p> <p>They were acknowledged along with the other grocery brands for how they supported those in need.</p>	<p><i>"Giving their employees bonuses for working during lockdown."</i></p> <p><i>"Haven't increased any of their prices since the start of the lockdown and have readily available products."</i></p> <p><i>"They as brands are helping out the needy and raising funds too in order to help the homeless and the people who are infected and suffering from the virus."</i></p>
<b>Nando's 14</b>	Nando's have been true to brand and provided comedic relief for consumers without negating the seriousness of the pandemic.	<p><i>"They always come up with ways to make people laugh on their social media."</i></p> <p><i>"Their messaging has been fantastic. Keeping to brand, but taking the seriousness of the situation into account."</i></p>
<b>Dettol 14</b>	Dettol was mentioned for educating consumers on handwashing.	<i>"Educating us to wash our hands more often."</i>

Brand and no. of mentions	Theme	Respondent quotes
<b>Vodacom 13</b>	Vodacom was mentioned for their positive messaging to consumers, educating and encouraging better practise to avoid infection.	<p><i>"Making a effort to assist with cellphones to health care workers."</i></p> <p><i>"Encouraging us to stay alert about Corona everyday."</i></p>
<b>Dischem 12</b>	Dischem was mentioned for their services as well as for donations.	<p><i>"Offering healthcare service."</i></p> <p><i>"Donated towards this cause."</i></p>
<b>Lifebuoy 11</b>	Lifebuoy was mentioned around their education campaign that encourages handwashing to avoid infection.	<p><i>"Advertising that their hand soap is effective in killing germs and the World Health Organisation recommends frequent hand washing to prevent contracting the Coronavirus."</i></p> <p><i>"Advertised the importance of washing hands as a way of defeating the pandemic."</i></p>
<b>Coca-Cola 11</b>	Coca-Cola was seen to have made very positive efforts to help the public at large.	<p><i>"Changed their labels to speak about the virus"</i></p> <p><i>"I saw Coca Cola's ad on Facebook that they have stopped advertising and used their entire advertising budget to feed the hungry. That is extremely admirable."</i></p>
<b>Tiger Brands 10</b>	Tiger Brands were mentioned for their role in assisting the poor as well as their steps in shutting down operations in factories once infection was identified.	<p><i>"Tiger Brands I think gave hampers to the Government which included soap and sanitisers to distribute in poor areas."</i></p> <p><i>"They closed their factory when employees tested positive and took precautions."</i></p>

Brand and no. of mentions	Theme	Respondent quotes
<b>Old Mutual</b> 10	Old Mutual were mentioned for launching a number of offerings to assist the public in the pandemic and have been noted for their ongoing and caring communication.	<p><i>"It has tried to run engaging and self-learning programs - to lift people's spirits and to let them know that they are not alone during this pandemic. That this too will pass - because we are in it together."</i></p> <p><i>"OM AMPD Studios staying in touch with me digitally means a lot too."</i></p> <p><i>"Introduced the free insurance policies of R4 billion for health workers. I think it's a very good call because our health care workers are at the forefront fighting and protecting us against this pandemic."</i></p>

<b>Discovery</b> 9	Discovery were seen to very quickly make their customers' lives easier, putting them first and providing discounts.	<p><i>"Discovery Health: flexible access to doctors, new options for payment, forward thinking towards possible need for self-isolation in converted hotels at discounted rates."</i></p> <p><i>"Discovery offering 25% discounts on insurance premiums."</i></p>
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<b>Clicks</b> 8	Clicks were mentioned for their communication and free services.	<p><i>"Emailed Corona updates and tips to remain safe."</i></p> <p><i>"Provided free flu vaccines."</i></p>
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<b>ETV / ENCA</b> 8	ETV/ENCA were recognised for leading a donation drive.	<i>"E-Raising funds to help less fortunate people."</i>
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Brand and no. of mentions	Theme	Respondent quotes
<b>Nike</b> 7	Nike was one of the few brands mentioned for their advertising rather than their actions, as their message was authentic to the brand and relevant to their world's current state.	<i>"Nike's #PlayForTheWorld campaign. As one of the most recognised and loved brands in the world, Nike has never sold a brand product, but rather, a message / story about never giving up in life. No matter the environment or circumstance you are in. Whether you are a sports athlete or not and even during this lockdown they are still able to get that message across. A message that may be more relevant now than ever."</i>

<b>South African Tourism</b> 7	Social responsibility through TV advertising, rather than product sales.	<p><i>"Brands such as Dunlop and South African Tourism have created great TV ads to encourage South Africans, through patriotism, to commit to the lockdown regulations. Not sure regarding the effectiveness of such, but great to see some brands taking the initiative of social responsibility."</i></p> <p><i>"Dept of Tourism look forward to future travel while staying home now."</i></p>
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<b>DSTV</b> 7	Free entertainment.	<p><i>"Opening up channels for free."</i></p> <p><i>"Allowing other users to access more shows."</i></p>
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<b>SAB</b> 6	Advertising social responsibility rather than consumption (relevant as alcohol sales prohibited).	<i>"SAB ad about 'this is what togetherness looks like' urging people to stay home."</i>
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<i>Brand and no. of mentions</i>	<i>Theme</i>	<i>Respondent quotes</i>
<b>Telkom 5</b>	Supportive and encouraging messages.	<i>"Sent messages encouraging people to stay home."</i>
<b>Albany 4</b>	Consistent pricing without compromising quality.	<p><i>"Albany and most bread brands kept the prices the same but are producing their products consistently."</i></p> <p><i>"An employee contracted the virus and safety measures had to be implemented and the factory had to be closed down."</i></p> <p><i>"Albany because they are donating bread to a lot of people."</i></p>
<b>Standard Bank 4</b>	Supportive and encouraging messages and financial assistance.	<i>"Implementing a Whatsapp group for communication on people affected and wanting to access help."</i>

# Implications

## - What this may create in the COVID-19 consumer going forward.

COVID-19 scepticism is setting in as the success of lockdown (in drastically slowing the infection and death rate) has ironically minimised the perceived threat of the COVID-19 pandemic.

The months of May and June may make the threat and impact of the COVID-19 pandemic more of a reality as we see both more health and financial implications experienced by more people we know (including ourselves).

SA's slow rate of infections and deaths may gather steam while we try to re-open the economy and find solutions to the great loss of business and income for so many.

We have already started seeing more dissent and fracturing of opinion in the Government's responses and, what has largely been a unified and respectful understanding, may now become more divisive and political as people's livelihoods are more threatened.

Right now, all bets are off the table for brand loyalty as consumers are shaken out of their normal purchase behaviours.

Because of financial strains, every cent needs to count more than ever. Trust is becoming an increasingly important commodity, one which

is hard earned and easily lost. **How a brand responds now, will define the levels of trust it is able to build and the strength of commitment a consumer is willing to pledge towards them.**

This also means that there will never be as big and as easy an opportunity to provide non-users with a reason to switch to your brand – provided that reason is good enough, relevant enough and speaks to their new state.

Consumers are being forced to become more savvy in every way, from how they manage their finances, to how they entertain their children, to how they can use a product for multiple uses, making things from scratch and finding sustainable solutions to problems, to which brands they now want to trust and associate with.

By the end of July, it should be more obvious which brands are going to survive and possibly thrive - through either being perfectly placed for this unexpected pandemic or through pivoting very quickly and successfully to cater to the new state of the COVID-19 consumer.

Social status and the need to badge are big drivers for why many brands are purchased.

It will be interesting to see the new ways and new tools that will emerge for how consumers try and gain status cues from others within the confines of the various lockdown phases. Elements such as having immunity, the shape, quality or fabric of your face mask or even having access to a certain zoom meeting invite may become the most status desired cues.

Lockdown, face masks and social distancing are all limiting humanities, need for social connection and are creating an opportunity for social intimacy to be fostered within the constraints of the law. People need people and have a desire to belong which is an important role of any brand. How brands provide spaces or ways for people to come together and to belong will be important.

'Corona Fatigue' is starting to set in and it is very difficult to escape. This therefore will become a big driver for consumers and they will look for brands who can facilitate escaping the overwhelming stress and threat of COVID-19 to being able to think, do, believe and engage with what life used to be, what life could be or what life would never be.

# Strategic thoughts

It is more critical than ever for brands to have a very clear understanding of the role they play within their consumer's lives.

Brands should develop clear answers to 4 critical questions.

- 1 As a brand, what do we believe gives us a distinctive viewpoint about the world and our place therein?**
- 2 What do we sell? Clearly articulated and simple to understand.**
- 3 What do we do? Our role within the world, linked to our product and the needs of our audience.**
- 4 How do we do it? In a way that is authentic to our distinctive viewpoint and done in a way in which only we could do it.**

Brands need to gain a clear understanding of their audience. The COVID-19 crisis will inevitably change the world in which we function and so the insights around your audience prior to the pandemic will have changed significantly. Efforts spent to uncover these insights will be invaluable as a simple insight may be the difference between success or failure.

Consumers don't want to be a part of your story, you need to become a part of theirs. Build work that matters, is authentic to the brand and that creates real world impact in order to reap long-term rewards.

# What we are looking for next

There are still many implications for both consumers and brands that we are interested in uncovering:

- How will the financial, emotional and mental strain impact how people purchase?
- How will the physical and health limitations impact how and where people purchase?
- How will the limitations of physical gatherings, social distancing and online hanging out impact social belonging needs, status cues and in-grouping affiliations?
- How will ideology impact how people respond and behave?
- Which stories, conspiracy theories, beliefs will gain momentum and become the perceived truth for which segment of people?
- Who will be the new Influencers, experts, opinion setters and trendsetters?
- Are consumers going to start changing what they look for in a brand? What value cues will they start being drawn toward and which cues will they start being pushed away by?

\*This survey will be a general and overall view so let us know if you would like to conduct a survey specific to your brand and target market.



# Timeline

30 December 2019 - 10 May 2020

Date	Event	Date	Event	Date	Event
30 December 2019	Dr Li Wenliang, of Wuhan, Hubei province alerts other doctors of possible virus outbreak.	27 February 2020	President Cyril Ramaphosa directs the evacuation of South Africans from Wuhan.	24 March 2020	The Tokyo Olympics are delayed until 2021.
31 December 2019	A "pneumonia of unknown cause", detected in Wuhan, China, is officially reported to the WHO Country Office in China.	5 March 2020	A 38-year-old man from KwaZulu-Natal becomes the first person in South Africa to test positive.	27 March 2020	The United States leads the world in confirmed cases.
11 January 2020	Chinese government announces that the first known death had occurred two days earlier.	7 March 2020	WHO announces that the total worldwide infected cases has risen above 100 000.		Lockdown starts in South Africa as the country's first fatality was confirmed after a Cape Town woman died at Medi-Clinic in Durbanville.
13 January 2020	WHO reports first case outside of China, in Thailand.	8 March 2020	Northern region of Italy goes into lockdown affecting 16 million.	6 April 2020	Prime Minister Boris Johnson moved into intensive care.
27 January 2020	Death toll in China at 106.	11 March 2020	WHO declares COVID-19 a pandemic.	14 April 2020	President Trump planned to stop United States funding of the WHO.
	South Africa's National Institute for Communicable Diseases (NICD) declares "We would like to assure South Africans that South Africa is prepared to deal with the eventuality of a possible imported case as we have put in place systems to rapidly identify, detect and respond to any cases that may reach our borders."	14 March 2020	USA declares a national emergency on COVID-19.	21 April 2020	Ramaphosa announces R500-billion COVID-19 package for South Africa.
11 February 2020	WHO gives the name COVID-19 (Coronavirus Disease 2019).	15 March 2020	South African students return from Wuhan, China. The students were moved to a quarantine facility in Limpopo upon arrival. All of them tested negative for COVID-19.	26 April 2020	The global death toll surpassed 200 000.
20 February 2020	A modelling study published in The Lancet medical journal finds that South Africa, Egypt, and Algeria are the three African countries at the highest risk of importing the COVID-19.	18 March 2020	President Cyril Ramaphosa declares a National State of Disaster and announces measures to fight the spread of the virus.	28 April 2020	The United States records over one million COVID-19 cases.
			Global cases exceed 200 000.	1 May 2020	South Africa lowers emergency level to 4.
			Total infections in South Africa for the first time exceed 100.	10 May 2020	Total cases in South Africa is 10 015 and 194 people have died from complications related to COVID-19.
			Ramaphosa announces South Africa will go into a 21-day lockdown.		



HaveYouHeard is a full service agency immersed in culture to influence it. We believe that the lines in the world of marketing and media have been rubbed out. They've been replaced by a fast and fluid cultural wave of information, entertainment, advertising, news, fact and opinion, ridden by an audience who choose how and when they interact with it.

As a business, brand, entrepreneur or creator if you're not obsessed with culture – understanding it, commenting on it, being a part of it and ultimately creating it – you're going to get left behind.

To live this belief, we place insight and strategy at the heart of everything we do; not simply to understand the 'what' of our audience's behaviour, but more importantly the 'why'. This simple change in approach allows our strategy team to develop work which influences behaviour in real time, creating work that delivers value for businesses, in achieving the set objectives, but also for their consumers, resulting in long term loyalty and organic brand advocacy.

To find out more visit [www.haveyouheard.co.za](http://www.haveyouheard.co.za) or contact us directly.

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