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Redefining Reach and Insights

G2 Insightz

STATE OF THE SOUTH AFRICAN CONSUMER



GOLD WINNER 2021
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Research Effectiveness Awards

Introducing **Go2-Insightz** a new continuous intelligence tracking tool to enable successful brands and leading marketing strategies for South Africa

USER-FRIENDLY

Maximise the value of your connected data with access to our simple **easy-to-use online dashboard. Export your chosen data story and pre-set charts** directly in to your presentations.

COMPREHENSIVE

+35 top level sectors, +54 sub categories, +100 topics, +1,000 brands tracked across online SA, representing 36 million consumers



COST EFFECTIVE AND FUTURE PROOF

Competitive market price point due to BA's ability to leverage our **sizeable proprietary panel of over 300,000+**

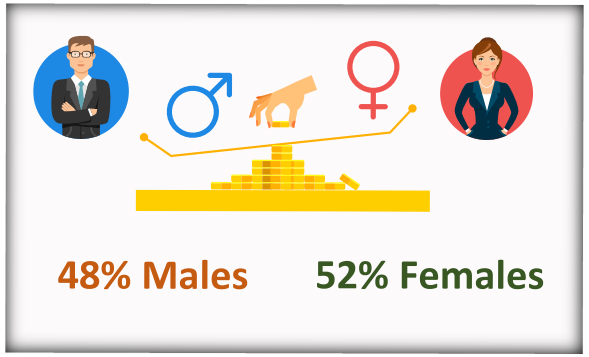
TIME-SENSITIVE

Fast turnaround with **quarterly data releases** and continuous data collection. Providing indicative trends, behaviors and profiles of your market in real time

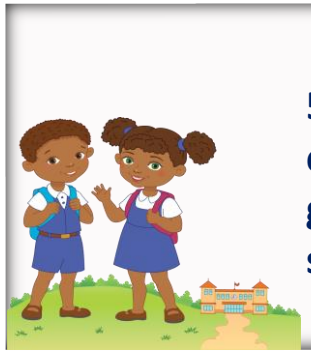
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A SNAPSHOT OF THE SA CONSUMER

Representing: 36 Million, Economically Active respondents with Internet Access



48% Males 52% Females



54% of their children go to government schools



55% of South Africans live with their family



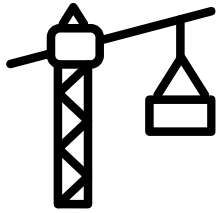
50% of South Africans are primary income earner of their family where 22% of them earn monthly income between R 10,000-20,000

Industry of Employment



11%

EDUCATION



9%

BUILDING & CONSTRUCTION



8%

FINANCIAL



8%

GOVERNMENT

Source: Go2-Insightz Q4'21, Q1'22,Q2'22, Q3'22 & Q4'22

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A SNAPSHOT OF THE SA CONSUMER



70%	12%	6%	5%	4%	2%	1%
ONE FULL-TIME JOB	ONE PART-TIME JOB	SELF-EMPLOYED SERVICE PROVIDER	BUSINESS OWNER	TWO OR MORE PART-TIME JOBS	OTHER	GENERATED FROM INVESTMENTS OR PROPERTY

Source: Go2-Insightz Q4'21, Q1'22,Q2'22, Q3'22 & Q4'22

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RISE IN WORRY OVER GOVERNMENT & THE ECONOMY

Q4'21

Corona Virus primary source of concern 74%

LOAD SHEDDING 50%
GOVERNMENT 49%
ECONOMY 48%
POVERTY A LESSER WORRY AT 39%



Q1, Q2, Q3 & Q4'22

Worries shift to **LOAD SHEDDING (63%)** **GOVERNMENT** & **Economy (59%)**, Significant rise in concerns About **POVERTY (56%)** from previous year

South Africans are looking at the pandemic from the rear view mirror and their gaze is now focused on Government and the Economy with increasing concerns over their finances and poverty.

Source: Go2-Insightz Q4'21, Q1'22,Q2'22, Q3'22 & Q4'22

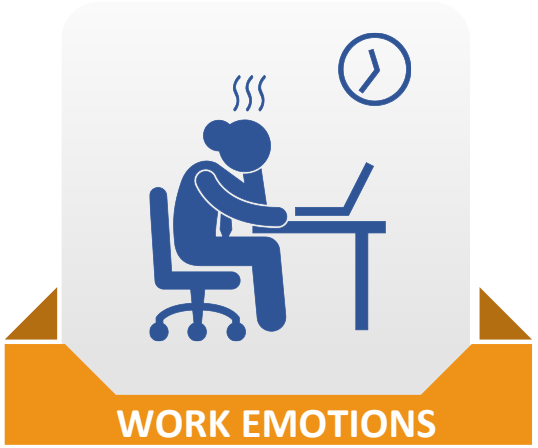
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FINANCES THE MAJOR SOURCE OF CONCERN AND FOCUS

PLANNED FOCUS AREA



At **37%, finances** occupy the most planned focus area, followed by **progressing in career/business at 18%.**



Stress and anxiety are the prevalent emotions at work with females feeling more anxious compared to their male counterparts



67% Home making (cooking/baking /DIY/gardening) **66% Watching TV**
50% Outdoors and nature
50% exercise or wellness

CONCERN AREA



Financial concerns are the main source of worry for many South African consumers at 51%

Indian and White ethnicities are more likely to be concerned about physical health

Source: Go2-Insightz Q4'21, Q1'22,Q2'22, Q3'22 & Q4'22

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FAMILY REMAINS TOP PRIORITY

PRESENT PRIORITIES

59% WORK

31% LEARNING

79% FAMILY

36% SPIRITUALITY

22% EXERCISE

PLANNED PRIORITIES







Family time is the most planned priority at 67%, followed by exercise, learning and spirituality at 49% each

Source: Go2-Insightz Q4'21, Q1'22,Q2'22, Q3'22 & Q4'22

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GOVERNMENT POPULARITY STANDINGS ACROSS CONSUMER SEGMENT

The vast majority (58%)of South Africans are unhappy with the government and are concerned about how political problems will impact their lives The overriding feeling is that they are not doing a good job



64% of senior citizens 50+ express more dissatisfaction with government compared to 53% of the younger populace ages 18-34

Only **4% of the economically active populace** express any satisfaction with the government and the work they are doing
Majority (66%) of White South Africans are **not happy** with the government

Interestingly the government has the **least dissatisfaction** expressed by **lower income groups at 46%** and have the highest approval from this income group
Whilst **60% of higher income** groups do not think the **government is doing a good job**

Source: Go2-Insightz Q4'21, Q1'22,Q2'22, Q3'22 & Q4'22

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SA CONSUMER SHOPPING BEHAVIOUR

Absence of brand loyalty in categories such as Food and Household items. Consumers more likely to buy another brand (45%)

Pricing the prominent driver in most categories at 63%

Impulse buying mostly in Grocery (57%) and Clothing (50%) categories influenced mainly by **promotions**.

Consumers **actively seek out and follow advertising promotions (23%)**



25th of the month (42%) the most popular timing to shop for the month

Bulk shopping (54%) once a month with small top ups in between

72% do most of their shopping **in-store.** With 52% solely responsible for making decisions on household purchase

Loyalty programmes remain popular amongst Supermarket (66%), Clothing and Shoes (48%) and Pharma Stores (45%)

Source: Go2-Insightz Q4'21, Q1'22,Q2'22, Q3'22 & Q4'22

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THE SOUTH AFRICAN YOUTH

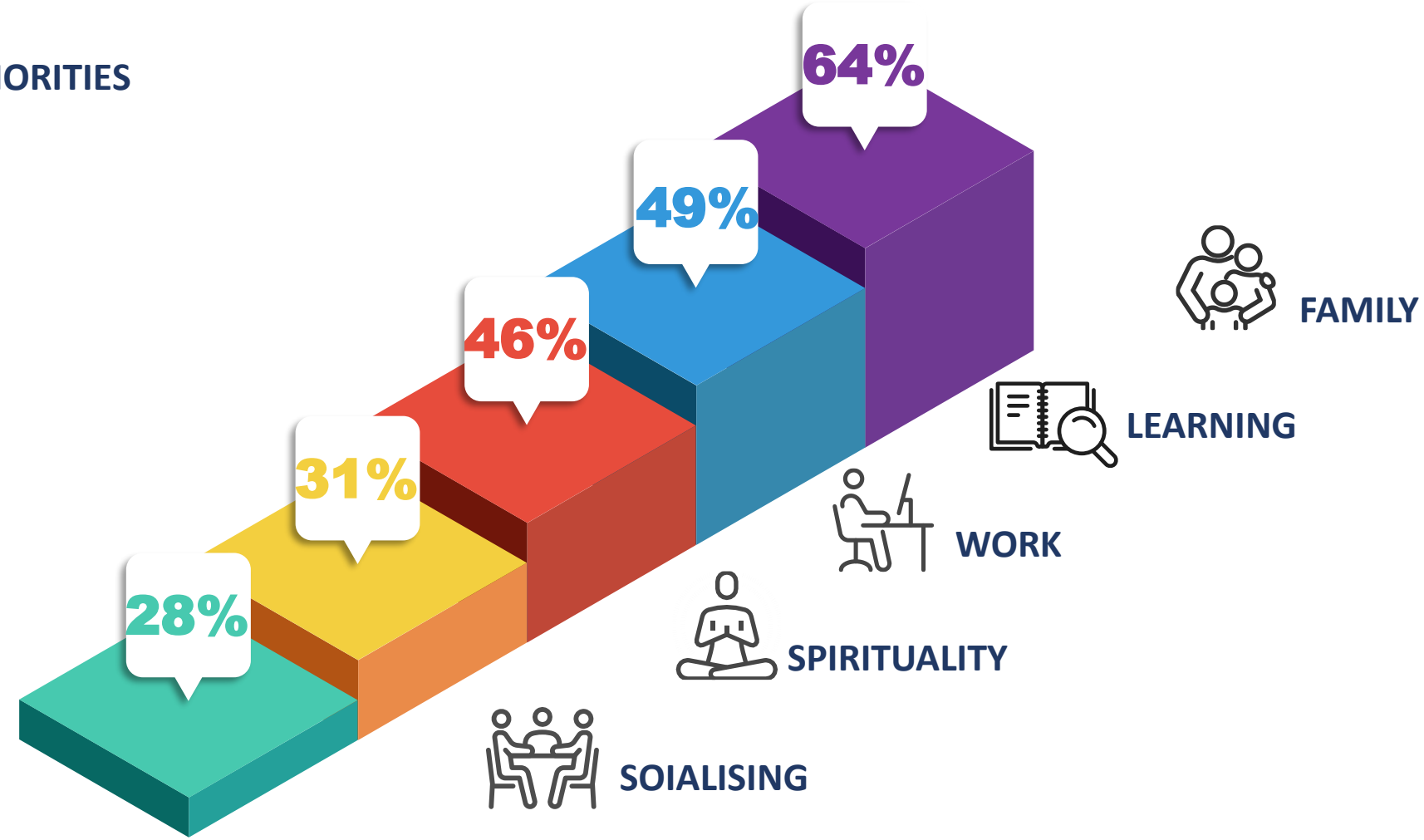


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STATE OF THE SOUTH AFRICAN YOUTH

The SA youth is complex and reflects both the difficulties they face with high unemployment & poverty with the resilience and determination they display in overcoming these challenges. The insights below gives us a glimpse into their current state of mind:

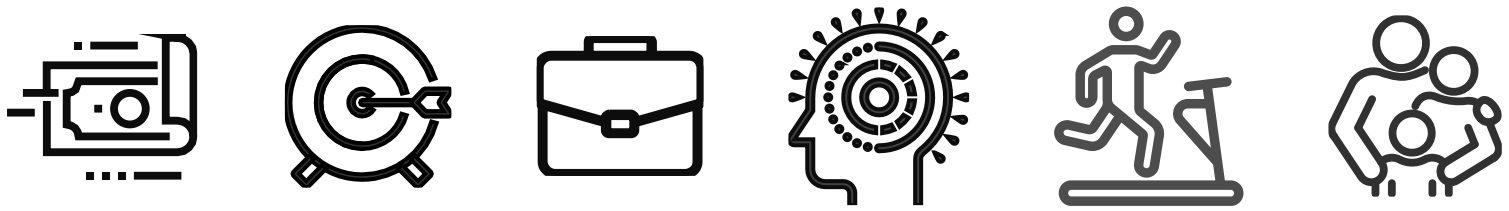
PRESENT PRIORITIES



Source: Go2-Insightz Q4'21, Q1'22,Q2'22, Q3'22 & Q4'22

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STATE OF THE SOUTH AFRICAN YOUTH



PLANNED FOCUS AREA

Finances, Career / Business Progression and Personal Development / Learning are the top three priority focus areas
41% makes **Education the most important cause** for the youth, mirroring the learning and development that the youth are focused on. For white youth, **animal rescue** is the most important cause

CONCERN AREA

Their areas of concern mirrors the planned focus area with Finance and Career / Business progression as the top two however, **mental health is the third area of concern for the youth**

LUXURY TIME

Leisure and Socialising are the top activities in how the youth spend their luxury time
For young females, exercise is the third luxury activity while for young men it's spending time with family

Source: Go2-Insightz Q4'21, Q1'22,Q2'22, Q3'22 & Q4'22

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SHOPPING PREFERENCES & MEDIA BEHAVIOUR

Debit cards (46%) are their preferred payment method

Preferred clothing and Accessories stores are Mr Price (71%), Ackermans(70%), Edgars (60%)

Whilst they pay attention to product ads on SM but for most (26%) it is not a trigger to purchase. TV is the preferred channel to trigger a purchase

However 21% will engage with social media content by clicking on links through to websites, enter competitions or any other form of online engagement

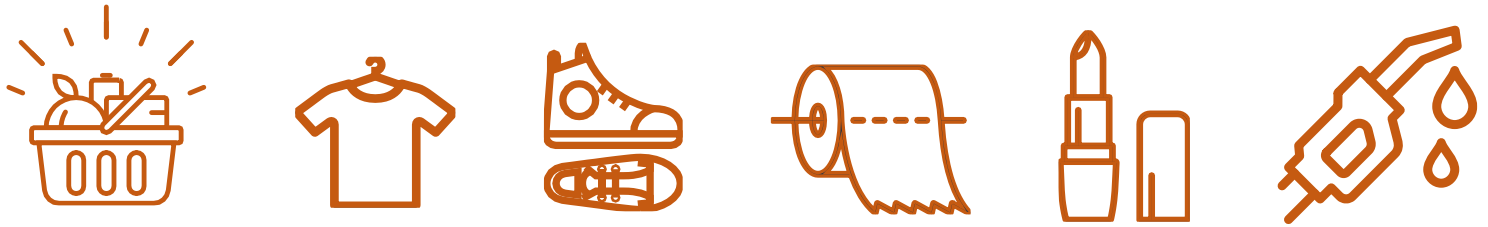
When actively seeking for product & promo info they rely on social media

On social media they are found mostly (76%) on Facebook

Source: Go2-Insightz Q4'21, Q1'22,Q2'22, Q3'22 & Q4'22

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SPENDING HABITS & PURCHASE DECISIONS



The top 5 categories purchased in the last 3 months –
Groceries (85%), Clothes & Shoes (76%), Cosmetics (65%) and Fuel (50%)



Electronics & Digital devices (52%) as well as Holiday/trips (39%) are the top planned purchases

Most(48%) make joint decisions around purchases





Most (24%) make an online purchase at least 2-3 times a month

Source: Go2-Insightz Q4'21, Q1'22,Q2'22, Q3'22 & Q4'22

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SA YOUTH INFLUENCE ON BRAND MARKETING



They admire imaginative brands and believe their choice of brand is a reflection of who they are

The 18-24 yo (60%) are more likely to engage with brands and influencers on social media than any other age group

Young South Africans are conscious of the ethics and choices of a brand and 45% claim this will have an effect on their purchase decisions

They are a key proponent of word of mouth marketing as 45% strongly rely on advice from friends & family and are more likely to share & discuss about products

47% will choose environmentally friendly products & show support for companies that support the community (48%)

Actively try to be early adopters and are often curious about new products

Source: Go2-Insightz Q4'21, Q1'22,Q2'22, Q3'22 & Q4'22

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