









Amidst a dynamic economic landscape, our report sheds light on four key consumer trends: Adaptive resilience, Mindful wellbeing, Emerging reality and Sustainability. Understanding consumer behaviour reveals the intricate dance between economic conditions and spending habits, presenting a nuanced perspective. Moving into 2024, successful implementation of these strategies promises heightened consumer engagement and loyalty, as brands pivot towards more personal and value-driven interactions with their audience in the face of economic challenges.



This report marks the inception of a comprehensive series dedicated to unravelling the state of consumers and envisioning the future.

YANNICK LEFANG

Founder & CEO Kasi Insight Inc





THE KASI FRAMEWORK

Brings customer centricity to life in 3 steps

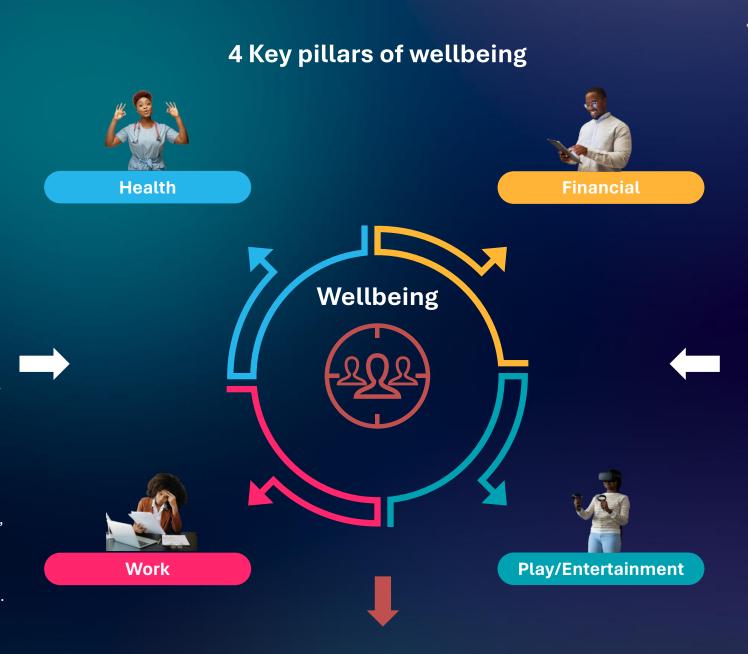




The Tension Crisis: Desire vs Reality

We live in a world of contrasts. We yearn for success, yet opportunities seem scarce. We aspire for a healthy lifestyle, yet it appears costly. This tension between our desires and reality is a crisis that affects us all.

For instance, the aspiration to excel professionally is universal, yet the scarcity of jobs can be disheartening. Similarly, the desire to lead a healthy lifestyle is often at odds with the high costs associated with it. This tension crisis is a reality we must acknowledge.



Consumer centricity based on holistic wellbeing is not just a concept, it's a call to action. It's a journey towards creating a world where every individual can thrive, where the tension crisis is addressed, and where finding a balance isn't just a goal, but a reality. Let's embrace this journey together, for a better, balanced, and holistic future.



The Balance: Bridging the Gap

Finding a balance is paramount. It's about creating an environment where our desires align with our reality. It's about making job opportunities accessible, making healthy living affordable. It's about ensuring that our financial, work, health, and entertainment needs are not just met, but are intertwined in a way that one aspect positively impacts the others.

Consumer centricity is the key to this balance. It's about understanding the consumer's needs, their tension points, and creating solutions that not only meet their individual needs but also contribute to their overall wellbeing.



Define the 4 key pillars of wellbeing









Health

ance

Work

Play

Translate, survey & analyze









4000+ unique questions

e 12000 interviews per month

Advanced Statistics & Al

Generate data, trends & insights







50M+ data points

600+ datasets

500+ analysis



THE METHODOLOGY

Kasi

The Kasi Insight Decision Intelligence platform is a robust framework developed by Kasi Insight to help decision makers unlock trends and insights at scale. We fuse exclusive real-time data with applied AI to decode African opinions, actions, and the future.

With our cutting-edge platform, we tap into 609 million African voices, conducting 12,000+ monthly interviews across 40+ major economies, crafting tailored projects spanning every corner of the continent.

This report is leveraging data collected from 2017 to 2023, four datasets (consumer sentiment, retail demand, media consumption, consumer purchase and health/wellness.



Integrating state-of-the-art data from our high frequency surveys and deep insights from our consumer analytics experts, we at Kasi Insight are not just tracking trends; we're deciphering the dynamic nature of consumer behaviours. The Kasi Insight Portal isn't a passive spectator; it's an active participant, influencing our daily operations and strategic decisions.



PAUL CHELOTI

Analytics Engineer

Every trend in this report has been broken down into three levels:

Level 1

THE TREND

What are the four trends that brands must align themselves to if they are to remain ahead of consumer behaviour?

Level 2 APPROACH

Within every trend, what are the three or four 'microtrends' that provide multiple opportunities for brands to capitalise on?

Level 3 FORESIGHT

Within each 'Approach', what are the predictive insights or indicators that can guide brands in making informed decisions and strategies for future consumer engagement and market positioning?



Description

Kasi Index of Consumer Sentiment (ICS) is a measure of consumers' confidence level in the economy, based on their personal financial situation, current economic conditions, and future economic expectations. Consumer sentiment has an impact on spending behaviour, with high sentiment leading to increased spending and low sentiment leading to reduced spending.

Kasi Retail Demand index measures consumer demand for retail category and provides insights on how consumer habits impact demand for various categories. The index ranges from + 100 to - 100. An index level close to 100 means demand is high as more consumers are looking to purchase while an index level close to -100 means demand is low.

Kasi Insight's Media Consumption Tracker monitors consumer preferences for information sources monthly. It equips advertisers with valuable insights, enabling them to refine strategies, improve targeting, and enhance overall campaign effectiveness across the diverse African landscape.

Kasi Insight's Consumer Basket Purchase Tracker provides detailed information on consumer purchasing behavior in terms of their shopping baskets. This dataset offers insights into the products consumers are buying, how often they make these purchases, and the factors influencing their decisions.

Kasi Insight's Health and Wellness Tracker provides comprehensive data on various aspects of personal health, lifestyle choices, and access to healthcare services on an annual basis. By monitoring these factors, the data offers insights into the overall well-being of consumers within specific demographics or regions.



Algeria

Research Coverage

- □ Angola
 □ Nigeria
- Botswana Mozambique

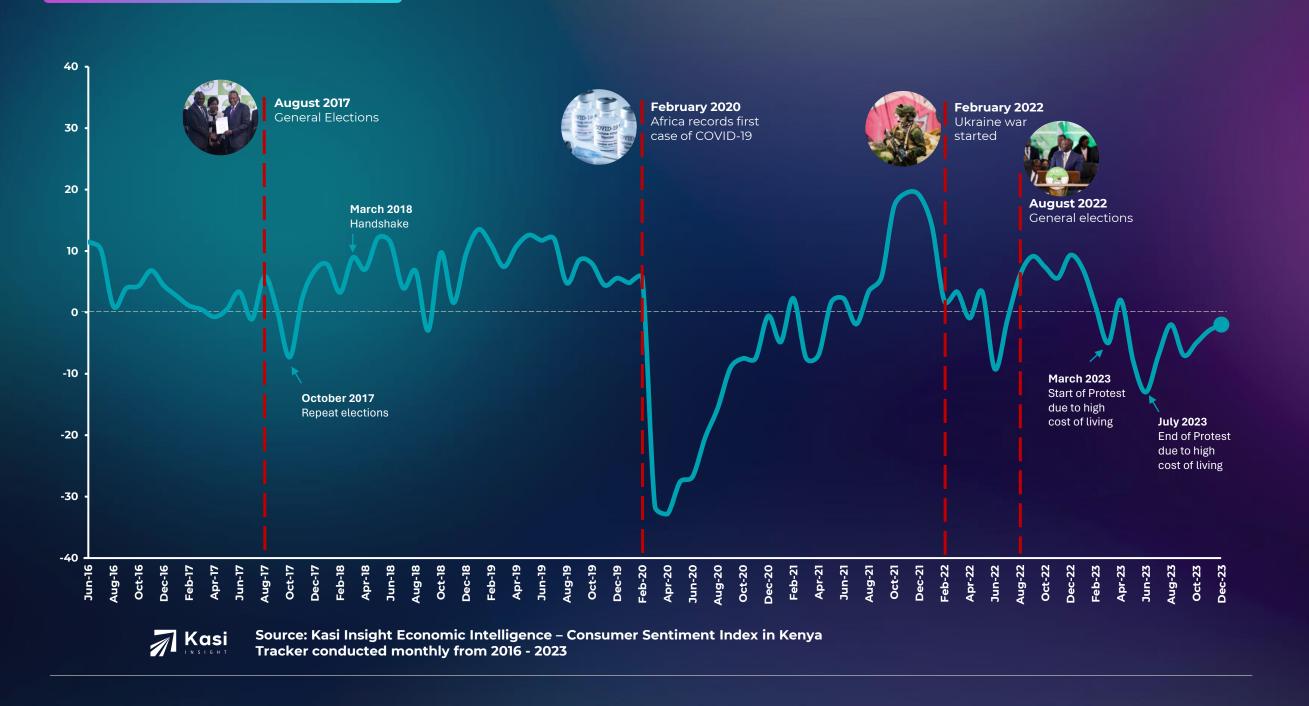
Morocco

- □ Cameroon □ Senegal
- □ Congo
 □ South Africa
- □ DRC
 □ Tanzania
- Egypt
 Tunisia
- □ Ghana
 □ Uganda
- □ Ivory Coast □ Zambia
- □Kenya
 - Zimbabwe
- Namibia

THIS REPORT FOCUSES ON KENYA

Setting the stage with Africa's most revealing economic indicator

Kasi's consumer sentiment index gauges the confidence and optimism of consumers



The Consumer Sentiment Index (CSI) is a measure that gauges the confidence and optimism of consumers regarding the overall state of the economy. It is designed to reflect the prevailing attitudes, expectations, and perceptions of consumers towards economic conditions, employment, and their personal financial situations.

A higher index value generally indicates greater consumer confidence and optimism, suggesting a positive outlook on the economy, while a lower value may indicate reduced confidence and a more negative sentiment.



Not many reasons to cheer!

- 2017 General Elections Repeat/Violence: Negative impact with the index dropping by 13 points from August to October.
- 2018 Handshake: Positive impact with the index reaching an all time high 2 months after that event (at 11 points)
- 2020 Covid pandemic: Negative impact with the index dropping by 38 points from January to April.
- 2022 Ukraine War: Negative impact with the index coming off it's all time high (19 points) and dropping by 28 points between
 December and June 2022.
- 2022 General Elections: Positive impact leading up to the vote
 with expectation of change but levels still below the 2021 all time
 high.
- 2022 Inflation/Rising Cost: Negative impact with the index sliding since elections with protests between March and June 2023.

Leverage consumer sentiment to win

The Consumer Sentiment Index is a versatile tool that provides valuable insights into consumer attitudes and perceptions, influencing decisions across various sectors and helping stakeholders make informed choices in both economic and business contexts.

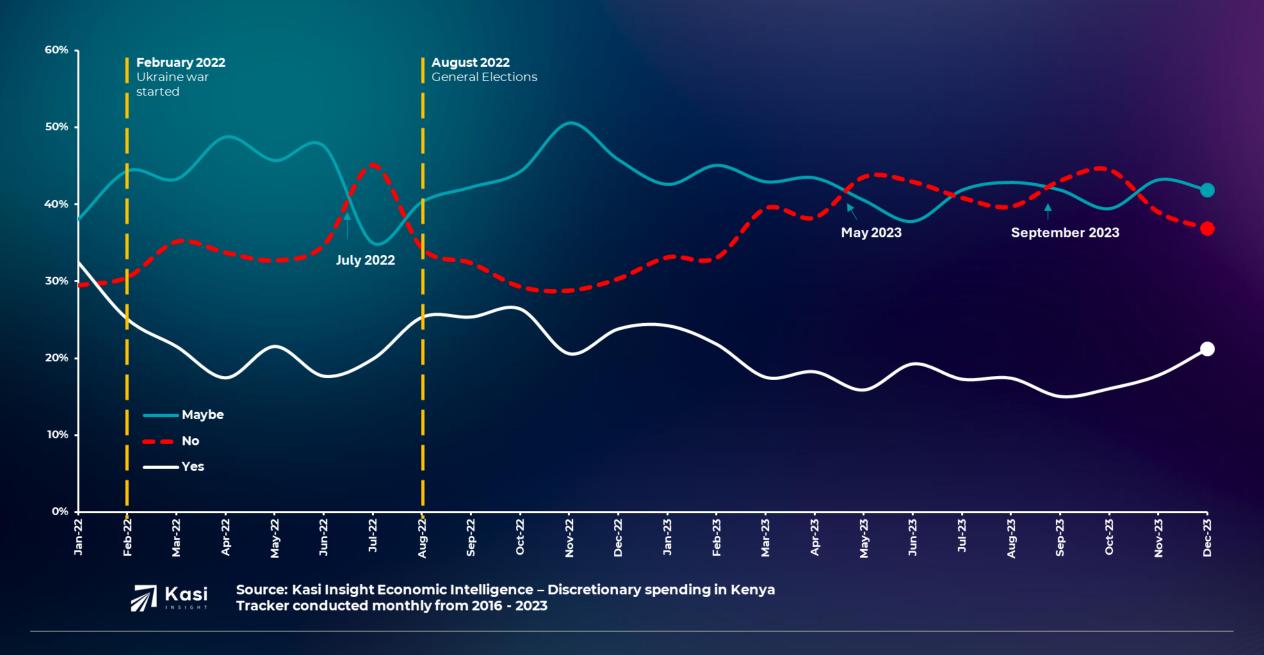
- Retailers and businesses rely on consumer sentiment data to anticipate changes in consumer spending patterns. High consumer confidence is often associated with increased spending, while low confidence may result in reduced consumer spending.
- Marketing professionals use the Consumer Sentiment Index to understand the prevailing consumer mood and tailor advertising and promotional strategies accordingly. Positive sentiment can be leveraged in marketing campaigns to boost sales and brand perception.

Consumers mostly on the fence and consideration key to win

Due to rising inflation, consumers in Kenya have seen their purchase power decrease



Are consumers looking to make discretionary purchases in 2023?



Discretionary spending is a sub-index of the index of consumer sentiment. It tracks the ability of consumers to make non-essential purchases. If the percentage of those saying "No" is high +50% and above, consumers are not willing to spend on discretionary and if the percentage of "Yes" is higher than 50% then consumers are willing to spend on non-essentials.

Consumers in Kenya usually on the fence

- Generally, consumers in Kenya are on the fence (%Maybe) when it comes to making non-essentials purchase (travel, furniture, car, etc.)
- Since January 2022, there has been 3 instances where the majority of consumers are not looking to make non-essentials purchase in July 2022 leading up to the elections, in May 2023 and September 2023 as rates and taxes were going up.
- Along the sales funnel, consideration is a challenge for brands in this environment.

Leverage discretionary spend data to win

The discretionary spending intend sub index is a measure of consumer's likelihood to make non-essentials purchases or consumer's ability to have extra money for entertainment, travel or even saving.

- Consideration is a crucial stage in the customer journey, which refers to the process that a potential customer goes through from the initial awareness of a product or service to making a purchase decision. During the consideration stage, consumers are actively researching and evaluating different options. This is a key moment for businesses to engage with potential customers and provide them with valuable information to guide their decision-making.
- Retailers and businesses rely on discretionary spending data to anticipate changes in consumer spending patterns. High level of discretionary index means consumers have enough disposable income to spend on non-essentials.
- Marketing professionals use Kasi discretionary spending index to understand the prevailing consumer mood at the consideration stage and tailor advertising and promotional strategies accordingly.

ADAPTIVE RESILIENCE

nce is very relevant in a

TRENDS, INSIGHTS AND FORESIGHTS



MINDFUL WELLBEING

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SUSTAIN ABLE

ref for brainids looking to stay ahead in

Consumers are actively engaging in mindful consumerism, increasingly conscious of the impact of their choices on the world. They prefer products aligned with their values, contributing to sustainability and equity. Transparency and authenticity are paramount, with consumers demanding information on product origins and environmental impact.

SUSTAIN ABLE BRANDS **Brands and products for** an

improved tomorrow

Consumers are actively engaging in mindful consumerism, increasingly conscious of the impact of their choices on the world. They prefer products aligned with their values, contributing to sustainability and equity. Transparency and authenticity are paramount, with consumers demanding information on product origins and environmental impact. There's a growing awareness that investing in sustainable products, though initially pricier, yields long-term value. Durable, repairable, or recyclable items are recognized not just for potential savings but also for fostering a sustainable lifestyle over time.

The sustainable brands trend holds relevance in a world increasingly focused on environmental and social concerns, where consumers actively seek products aligned with their values. This trend is a response to the urgent need for eco-friendly practices in the face of climate change and resource depletion.

Sustainable brands not only prioritize environmental responsibility, reducing carbon footprints, and promoting responsible resource use but also emphasize social responsibility, including

fair labour practices and

ethical sourcing.

1 in 2

Consumers are going for products

made with natural ingredients

several sustainability factors when making purchase decision

In a climate where transparency and trust are paramount, these brands openly communicate their values and production processes, aligning with the expectations of an informed consumer base. The rise of sustainable brands is further propelled by a shifting regulatory landscape, with policies favouring sustainability. Overall, this trend signifies a broader societal shift towards mindful and responsible consumer choices and business practices.







SUSTAINABLE BRANDS LEVEL 1 ● THE TREND LEVEL 2 • APPROACH LEVEL 3 • FORESIGHT

TRACKING THE TREND

The burgeoning trend of Sustainable Brands signifies a paradigm shift in consumer preferences, urging businesses to recalibrate their mission and strategies. By harnessing innovative technologies, sustainable materials, and natural ingredients, these brands are catering to the evolving consumer demand and offering individuals the chance to make environmentally conscious decisions.

These brands are not just selling products; they are promoting a lifestyle of sustainability and responsibility, enabling consumers to contribute positively to the planet with their purchasing choices. This trend underscores the power of consumer choice in driving business innovation towards sustainability. It's not just about better products; it's about a better future.

UNDERSTANDING THE CONSUMER TRENDS

Brands that need a way into Sustainable Brands can embrace the following microtrends and drive positive change for the environment, society, and communities

Net Zero & Sustainability

Consumers are making a positive impact by choosing products from brands committed to sustainability, including those with clear strategies for achieving net-zero emissions. This involves supporting companies that prioritize renewable energy, circular economy practices, and carbon offset initiatives

Supporting Local

Consumers are actively engaging with their local communities by supporting small businesses, farmers' markets, and artisans, fostering both sustainable local economies and a sense of community. This choice not only results in a smaller carbon footprint due to reduced transportation but also supports local employment and promotes ethical practices within the community.

Fighting for me

Consumers are actively advocating for their interests through well-informed purchasing decisions. This includes thorough research on products and brands, considering factors such as quality, durability, and ethical practices to align with personal values. Prioritizing personal well-being, encompassing both physical and mental aspects, involves choosing products and services that positively contribute to health.

Social change & ethics

Consumers are leveraging their purchasing power to drive social change by endorsing brands with ethical commitments. This involves supporting companies prioritizing diversity, inclusion, fair labour practices, and charitable initiatives. Ethical consumerism extends beyond product choices to financial decisions, allowing individuals to explore ethical investment options.

Tracking sustainability across gender & age groups

Year: 2023

SUSTAINABILITY FACTORS	OVERALL	MALE	FEMALE	BABY BOOMERS	GEN X	MILLENNIALS	GEN Z
Made with natural ingredients	1	1	1	1	1	1	1
Organic/ made with organic ingredients	2	3	2	2	2	3	3
Products with eco-friendly packaging (e.g. recyclable, biodegradable)	3	2	4	6	3	2	3
No-GMO	4	4	3	3	4	4	2
Products made in an environmentally friendly manner	5	5	5	4	6	6	5
Products that are made in Africa /made in your country	6	6	7	4	7	5	5
Not tested on animals	7	7	6	7	5	7	7
None of the above	8	8	8	8	8	8	7

- ✓ Organic ingredients and eco-friendly packaging are the next most considered factors. 31% of overall consumers consider organic ingredients. Eco-friendly packaging is considered by 30% of overall consumers.

ingredients are the most considered factor, with 51% of

✓ Across all segments, products made with natural

overall consumers considering this factor.

✓ No-GMO products and products made in an environmentally friendly manner are also important factors. No-GMO is considered by 28% of overall consumers while environmentally friendly products are considered by 22% of overall consumers.

LEARN MORE



Source: Kasi Insight - Sustainability data in Kenya

Q20. Product/Food sustainability means product/food that is safe and healthy for people and for the environment. When you are making a decision about which food or products to buy, which of the following sustainability factors influences which brands you buy



BRANDS SPOTLIGHT

We've spotlighted four brands, that are providing sustainable solutions and services to consumers



Gjenge Makers LTD -addresses plastic pollution by offering sustainable construction solutions

They achieve this by recycling plastic waste and transforming it into bricks that boast remarkable qualities—being 5x more durable, sustainable, and cost-effective compared to traditional concrete. These ecological paving blocks have already seen extensive use in Nairobi's walkways and hold promising potential as alternative building materials for low-cost housing. Gjenge's innovative approach not only tackles environmental issues but also contributes to creating affordable and resilient construction options.

https://www.gjenge.co.ke/



Nawiri - sustainable contemporary fashion brand for women based in Nairobi

The brand emphasizes local design, sourcing, and production to contribute to the community. With a commitment to fostering a more sustainable future in fashion, Nawiri focuses on minimizing negative environmental impact through upcycling and fabric redesign, aiming to protect the environment from premature landfills. The brand aspires to showcase that style and sustainability can coexist, inspiring a shift towards more eco-conscious practices in contemporary fashion.

https://nawirionline.co.ke/



KOKO is spearheading the adoption of liquid bio-ethanol cooking fuel as a rapid, secure, and cost-effective alternative to environmentally harmful cooking fuels like charcoal.

Through partnerships with the downstream fuels industry, KOKO seamlessly integrates this new fuel and offers a range of distribution, dispensing, and end-use technologies, ensuring customers can access clean fuel at prices that are more competitive than traditional options. Notably, the company provides carbon credits to businesses committed to authentic Net Zero initiatives, utilizing the proceeds to accelerate the adoption of the KOKO Fuel solution among low-income households that currently lack alternatives to deforestation-based fuels.

https://kokonetworks.com/



As a fundamental core value, the WEEE Centre runs an environmentally friendly operation. They are committed to the efficient, safe and conservative disposal of electrical and electronic waste.

The centre primarily sources e-waste from the private and public sectors through collection. It was launched as a pilot in 2010 and was the first e-waste recycling facility in East Africa that came into being with Safaricom Foundation, Close the Gap, and WorldLoop. As of 2019, the centre has managed over 10,000 tonnes of e-waste safely and can treat 200 tonnes/month. It is currently building its capacity in 15 countries in Africa

The Centre has formed several partnerships to promote e-waste management and recycling in Kenya and the East African region. Some of the notable partnerships include I&M Bank, Carrefour, WorldLoop, Total Energy & Safaricom. These partnerships have contributed to the WEEE Centre's efforts in managing e-waste, increasing awareness about e-waste, and promoting environmental sustainability



Sustainable Brands 2024

THE PUSH FOR SUSTAINABILITY & CLIMATE ACTION IS LIKELY TO INTESIFY

What consumers will be looking for?

Sustainability & environmental Responsibility

A continued and strengthened emphasis on sustainability is likely, with consumers seeking products and brands that actively contribute to environmental responsibility. This includes a commitment to reducing carbon footprints, using renewable materials, and implementing circular economy practices.

Digital and Contactless Experiences

The trend towards digitalization and contactless experiences is expected to persist and evolve. Consumers are prioritizing brands that offer seamless online interactions, digital payment options, and tech-driven solutions that enhance convenience and safety.

Diversity, Equity and Inclusion (DEI)

Increased importance placed on DEI considerations, both in products and brand values. Consumers are supporting brands that actively promote diversity, inclusivity, and social justice, aligning with their values on these important societal issues.

Health and Wellness

Consumer interest in health and wellness will remain a key focus, with an increased demand for products and services contributing to both physical and mental well-being. This includes health-conscious food options, fitness-related products, and experiences that promote overall wellness.



How brands can engage

Embrace Sustainability and **Transparency**

Continue prioritizing sustainability and environmental responsibility and communicate these efforts transparently to consumers. Brands that demonstrate a genuine commitment to sustainable practices are likely to resonate well.

Prioritize Diversity, Equity, and Inclusion (DEI)

Actively incorporate diversity, equity, and inclusion into brand values and practices. Consumers increasingly seek brands that promote social justice and inclusivity. Showcase diverse representation in marketing materials and ensure fair and inclusive business practices.

Facilitate Ethical Consumerism

Providing information on ethical sourcing, fair trade practices, and charitable initiatives enhances consumer trust. Brands that align with values beyond profit-making, actively contributing to positive social change, appeal to ethically conscious consumers.

Enhance Local and Community Engagement

Strengthening ties with local communities through support for local initiatives, sourcing locally, and participation in community events establishes a sense of connection.

Brands that actively engage with and contribute to local communities foster positive relationships.

6

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Kasi State of the Consumer Report 2024

We combine high frequency survey with the latest Al tools to deliver trends, insights and foresight. In this report, we are tracking 4 trends: Adaptive resilience, Mindful wellbeing, Emerging reality and Sustain able brands



Track the latest consumer trends



Understand how your brands can approach these trends and brand that are already doing it



Find out what consumers are looking for in 2024 and how your brand can engage and win

Download the full report now



AFRICA'S LEADING DECISION INTELLIGENCE PLATFORM

We envision an African market where you can win and inspire with confidence

Kasi Insight provides real-time, aggregated and trended primary data on and across Africa at a speed and ease not matched by traditional market research



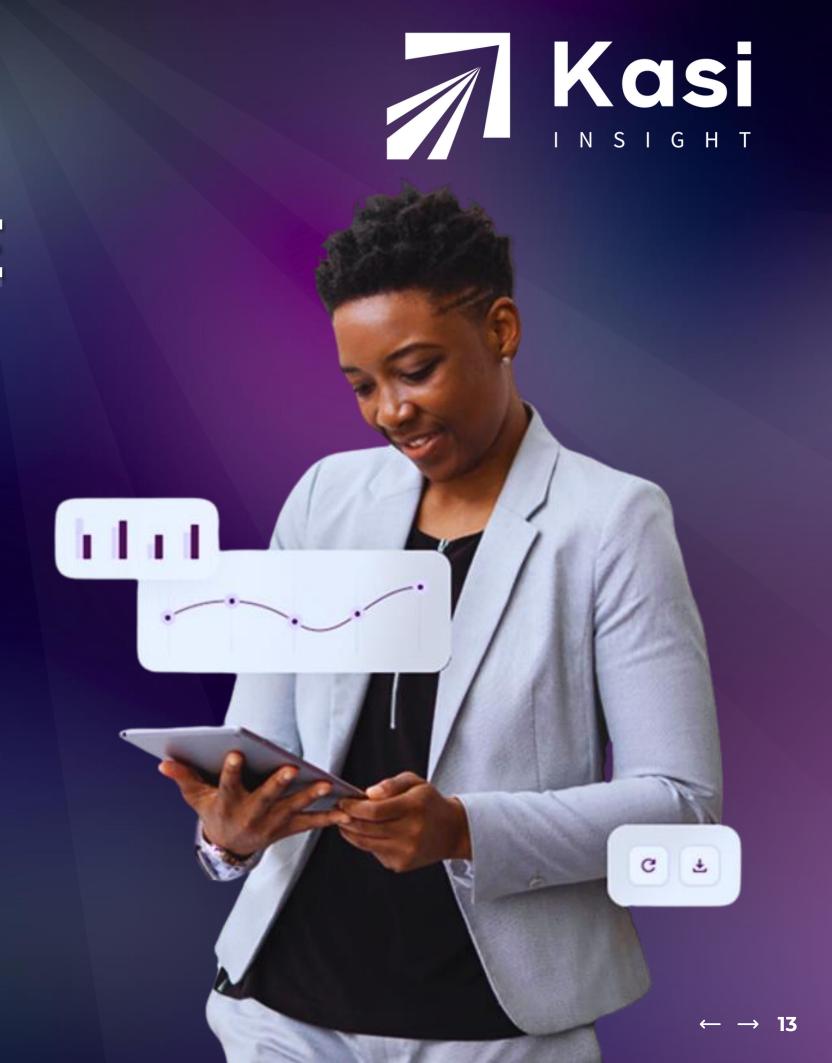
Decision Intelligence Platform

- Decision Intelligence Precision
- Distinctive Focus on Emerging Markets
- Innovative Technology



Research Intelligence
Solution

- Agile and Rapid Insights
- Pan-African Expertise
- Customizable Solutions



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Own the future

by making smart

decisions today



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