



Kasi COVID-19 Webinar II

Prepare. Plan. Act.
How COVID-19 changed daily
routines and shopping habits in
Africa

April 2020



Who we are

We don't just provide data – we empower decision makers



We are Africa's leading Decision Intelligence company; our story is a testament to African innovation and resilience. Born, funded, led, and supported by Africans, we are here to empower you with insights to win with confidence

Our approach combines proprietary high-frequency primary data with applied artificial intelligence, providing you with unparalleled insights into what Africans think, do, and what lies ahead.

With access to 609 million people across the continent, our proprietary platform facilitates **over 12,000** monthly interviews in **20+ of Africa's largest economies**. Additionally, we undertake custom projects in almost every corner of Africa, giving you a comprehensive view of this diverse landscape.

LEARN MORE



Solutions News and analysis Company

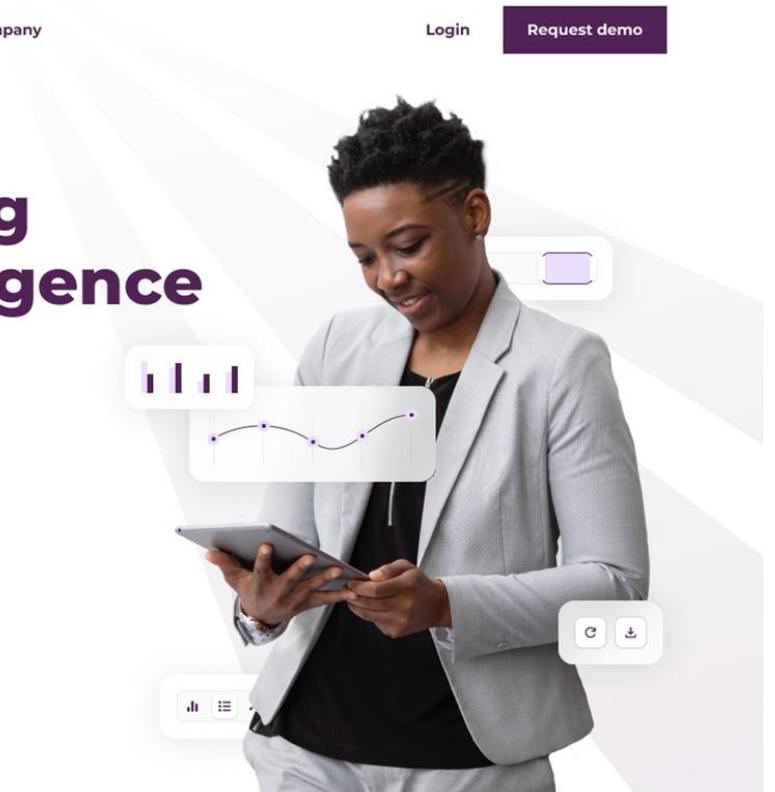
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Request demo

Africa's Leading Decision Intelligence Platform

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

Get in touch



Speakers

Listening to Africans – Powering Market Creating Opportunities



Yannick Lefang
Founder & CEO, Kasi Insight



Patience Muyambo
Research Director, Kasi Insight

Kasi COVID-19 PULSE - Tracking the impact of COVID-19 on Africans - attitudes and behaviours



To assist in understanding impact on African consumers and brands Kasi launched COVID-19 Pulse in Feb 2020

We have been tracking consumer behaviour and sentiment as Africans navigate the worst disruption of the 21st century

Kasi COVID-19 Survey conducts **3,700+ monthly interviews across eight countries**, namely; South Africa, Nigeria, Ghana, Tanzania, Kenya, Ivory Coast, Ethiopia, and Cameroon.

Findings from the survey are published in a free monthly report and the **related data** will be available on Kasi consumer portal.

COVID-19 PULSE

Learn how KASI is helping companies adjust to the fast changing needs of consumers in Africa with our COVID-19 Pulse

- Track the impact on consumer confidence across 7 markets
- Understand how COVID-19 is shifting consumer habits and needs in Africa
- Access the role media and internet is playing in informing or mis informing Africans
- Uncover the opportunities and risks for local brands in Africa

GET ACCESS TO COVID-19 PULSE IN AFRICA

First Name Last Name

Organization Job Title

Work Email

SUBMIT

Country Coverage: Cameroon, Ghana, Kenya, Nigeria, Ivory Coast, South Africa, Tanzania

ANY QUESTIONS?
If you have any questions, use the chat, call or send us an email
hello@kasiinsight.com

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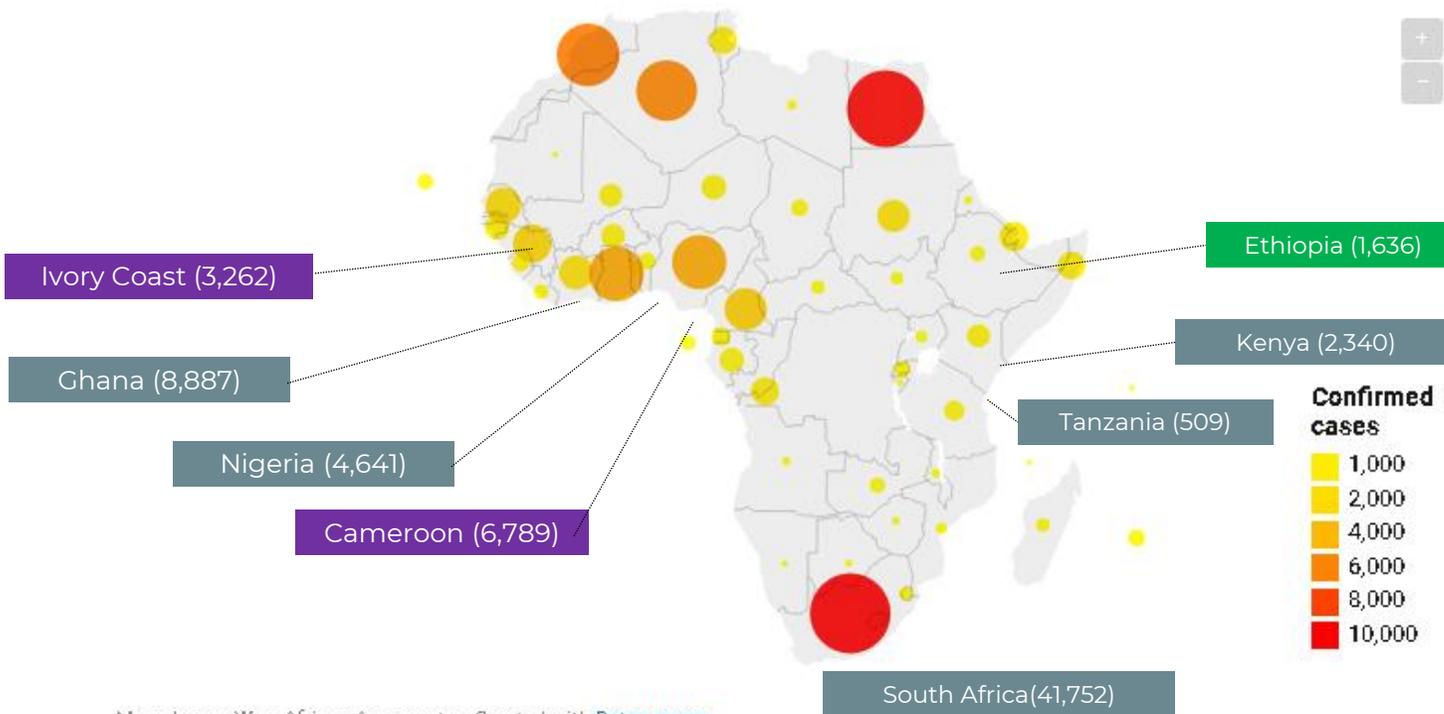
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Visit www.kasiinsight.com/covid19 to download the report

COVID-19 Impact



Despite early containment efforts the virus has spread across the entire continent. Almost all countries have increasing volume of cases of local transmission. South Africa, Egypt & Algeria lead in number of cases



Map: James Wan, African Arguments - Created with [Datawrapper](#)

COVID-19 Africa numbers

- 54 countries in Africa affected
- 168,464 cumulative cases in Africa
- 4,700 reported deaths
- 73,317 reported recoveries
- South Africa most affected with 40,792 cases

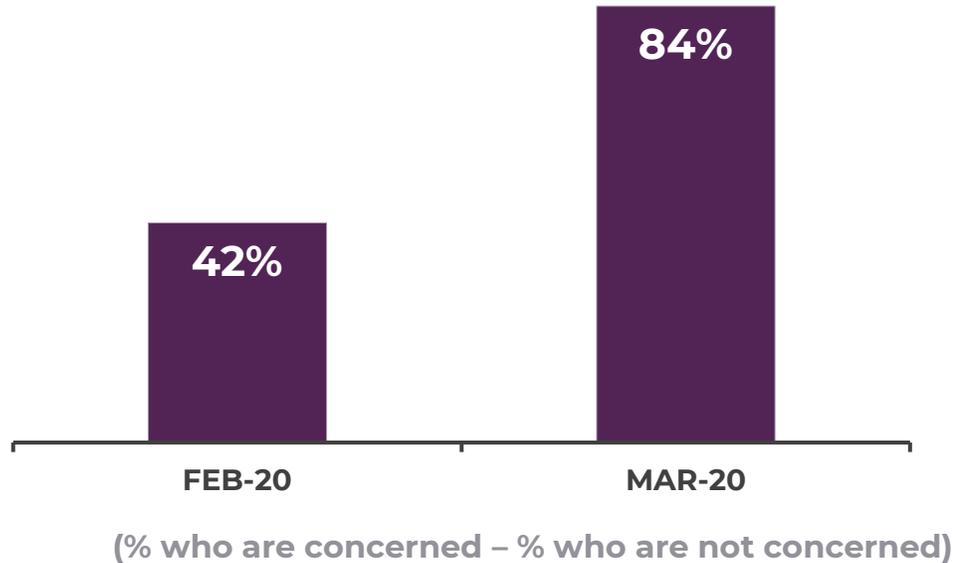
118,842 cumulative cases in WHO Africa Region

Last updated 05/06/20 at 06:00AM (GMT +1)

Diverse testing capabilities across countries – impact on volume of confirmed cases

Africans have serious concerns about COVID-19

Reality of COVID-19 hit Africans in March; raising fear index by 42 points compared to Feb. Despite the significant increase, not every country saw a large increase month-on-month



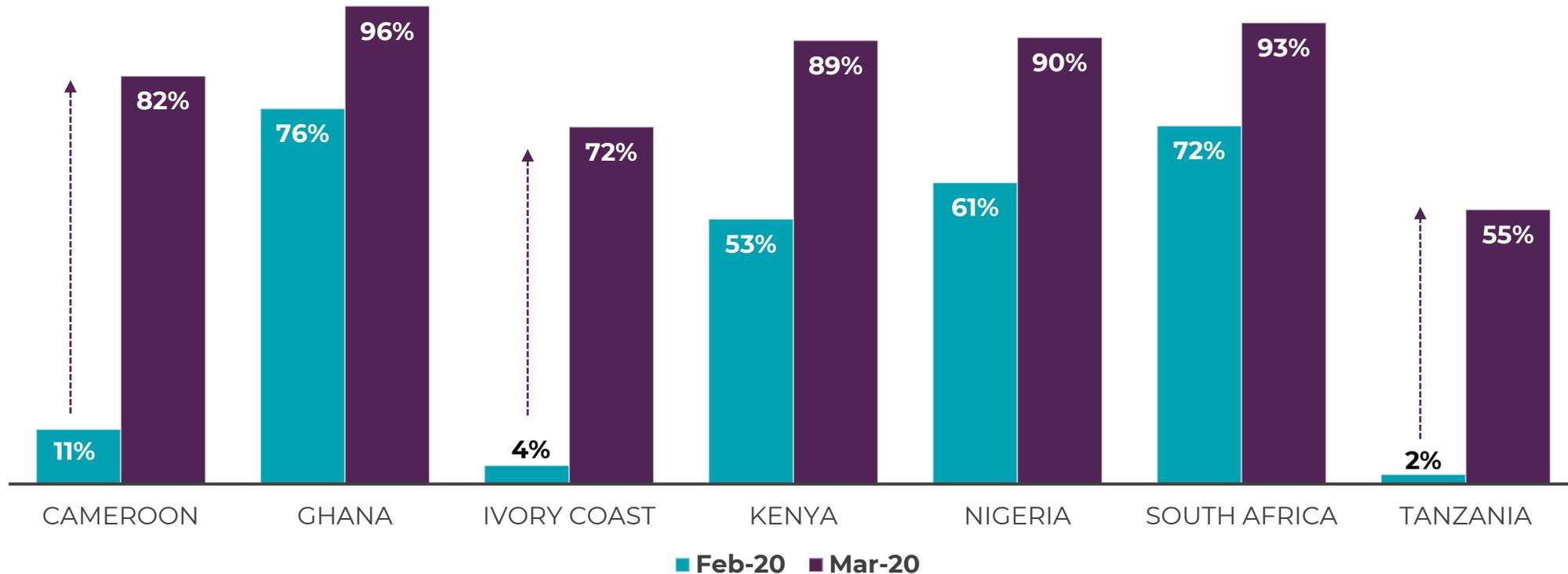
Question: How concerned are you with the coronavirus?

1. KASI, "Consumer Confidence Index & COVID-19 survey", Kenya, Ghana, Nigeria, South Africa, Tanzania, Cameroon & Ivory Coast, CAPI survey, 18+, n= 3421, Feb 18 – Mar 9, 2020
2. KASI, "Consumer Confidence Index & COVID-19 survey", Kenya, Ghana, Nigeria, South Africa, Tanzania, Cameroon & Ivory Coast, CAPI survey, 18+, n= 3064, Mar 22 – Apr 9, 2020

Vast majority of Africans are concerned about the virus

Francophone countries had the largest jump in their fear index, closing the gap to Anglophone countries. Tanzanians appear to be least concerned about the disease

How concerned are you with the coronavirus?



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Africans are more concerned about preserving their livelihoods

In Africa, COVID-19 is primarily an economic crisis, the health threat is considered secondary. Informal economies, high unemployment rates, and limited job security in Africa make COVID-19 a threat to people's livelihoods

What are you most worried about or concerned about the coronavirus?



% of Respondents (N=3069)

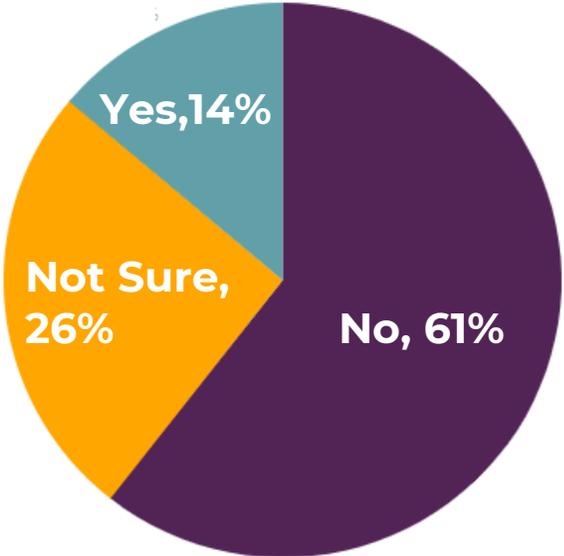
KASI, "Consumer Confidence Index & COVID-19 survey", Kenya, Ghana, Nigeria, South Africa, Tanzania, Cameroon & Ivory Coast, CAPI survey, 18+, n= 3064, Mar 22 – Apr 9, 2020

Infection rates are still low, yet most Africans cite already being impacted



Though the virus is rapidly spreading across the continent, it only constitutes 1% of total global cases. Only 14% of respondents know someone/know of someone who tested positive for COVID-19

Has anyone you know personally been diagnosed with the coronavirus?



KASI, "Consumer Confidence Index & COVID-19 survey", Kenya, Ghana, Nigeria, South Africa, Tanzania, Cameroon & Ivory Coast, CAPI survey, 18+, n= 3064, Mar 22 – Apr 9, 2020

African consumer confidence at an all-time low

In line with the global indices, consumer confidence in Africa is now falling fast, the larger size of the informal economy, weak health infrastructure in Africa means the COVID-19 impact can be catastrophic for Africans

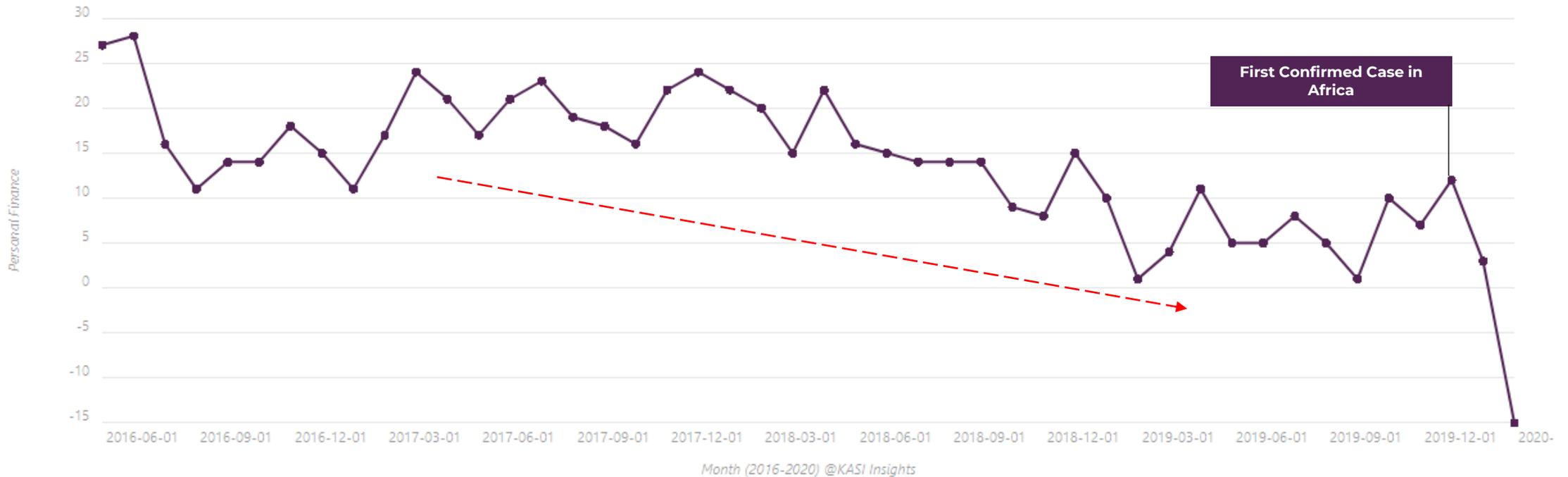
After a little bump in January, consumer confidence now in free fall



A month into the pandemic Africans already face financial distress

All Sub-indices, Consumer Sentiment and Personal Finance index fell sharply in March signalling a slowdown in consumer spending

The sub index was already trending low before COVID-19 impact



Will you be able to meet your regular expenses over the next 6 months?
Period (2016-2020)

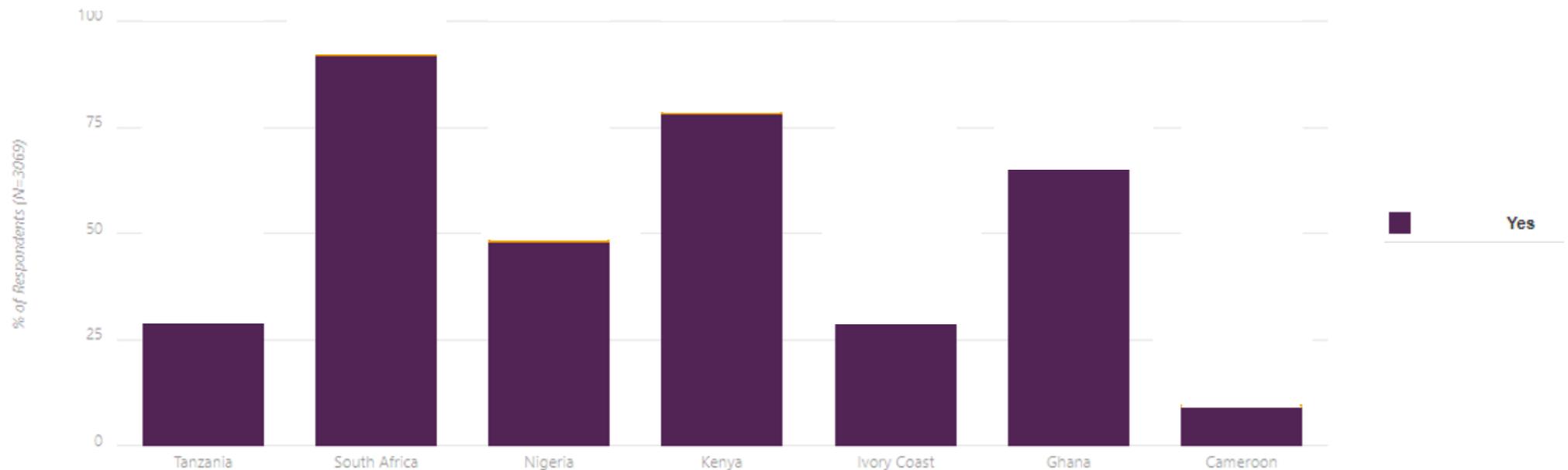
Changes in Lifestyle habits



COVID-19 has impacted most Africans daily routines, Francophone countries are least affected

Half of the people surveyed have changed their daily routines because of COVID-19 but the magnitude of change varies from country to country

Have you changed your lifestyles and daily routine in any way specifically because of the COVID-19?



Have you changed your lifestyle and daily routine in any way specifically because of the COVID-19? @KASI Insights

KASI, "Consumer Confidence Index & COVID-19 survey", Kenya, Ghana, Nigeria, South Africa, Tanzania, Cameroon & Ivory Coast, CAPI survey, 18+, n= 3064, Mar 22 – Apr 9, 2020

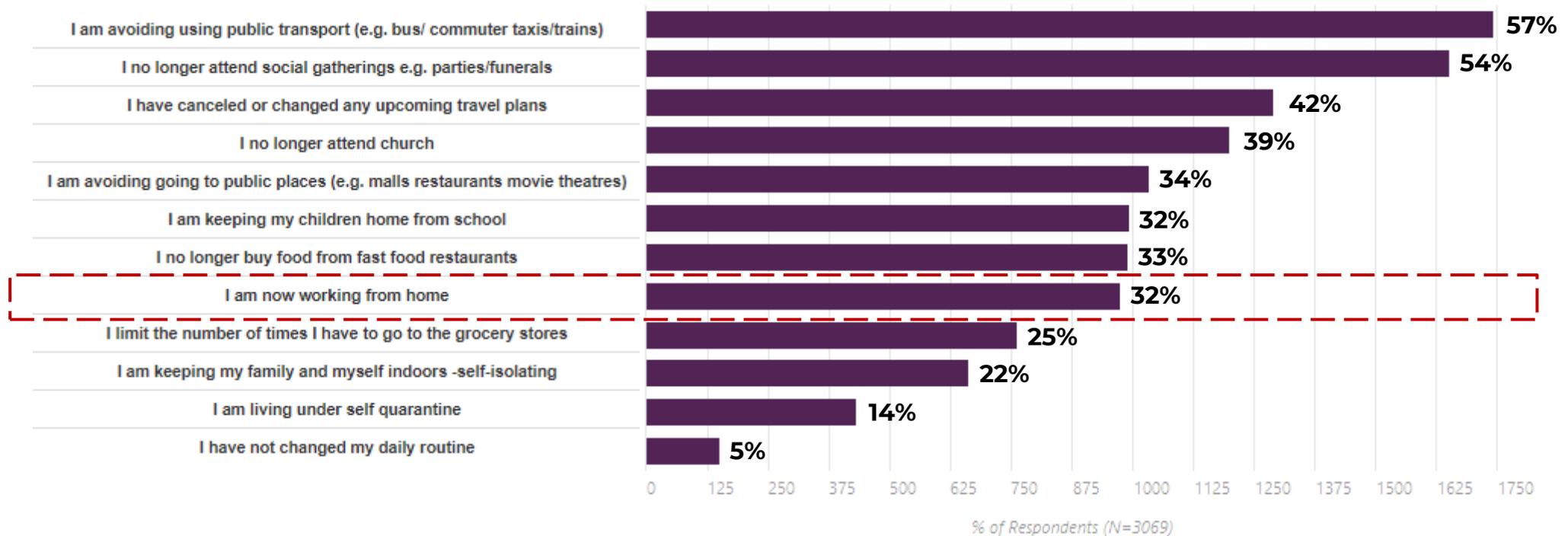
Not every country has implemented full lockdowns and other strict social distancing measures

Get access to Kasi's Consumer Sentiment dataset and uncover insights and opportunities for your business:
www.kasiinsight.com/book-demo

Working from home not the biggest change in Africa

The nature of the employment market in Africa is different than the western countries (US, China and Europe), people daily routines revolves around communal activities rather than office schedules.

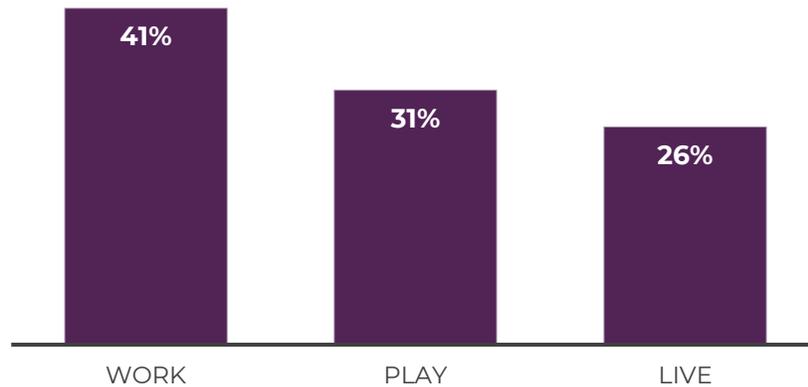
Which of the following applies to you when it comes to how your life/daily routine changed because of the coronavirus?



KASI, "Consumer Confidence Index & COVID-19 survey", Kenya, Ghana, Nigeria, South Africa, Tanzania, Cameroon & Ivory Coast, CAPI survey, 18+, n= 3064, Mar 22 – Apr 9, 2020

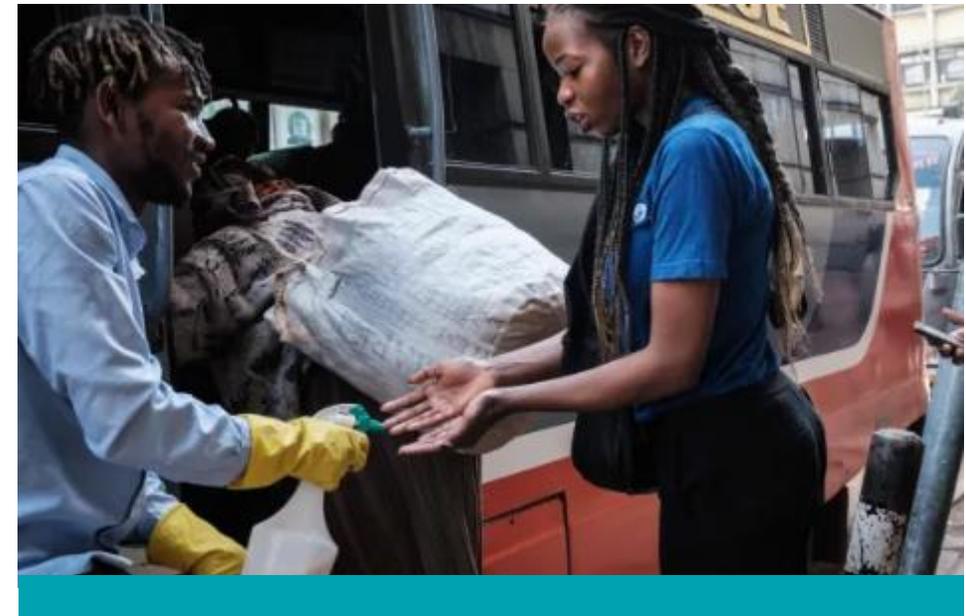
Majority of Africans are concerned about earning a living during time of crisis; hence they allude to their work life being the most affected part of their daily routines

Which of the following applies to you when it comes to how your life/daily routine changed because of the coronavirus?



- I am avoiding using public transport (e.g., bus/ commuter taxis/trains)
- I no longer attend social gatherings e.g., parties/funerals
- I have canceled or changed any upcoming travel plans
- I no longer attend church
- I am avoiding going to public places (e.g., malls restaurants movie theatres)
- I am keeping my children home from school
- I no longer buy food from fast food restaurants
- I am now working from home
- I limit the number of times I have to go to the grocery stores
- I am keeping my family and myself indoors -self-isolating
- I am living under self-quarantine

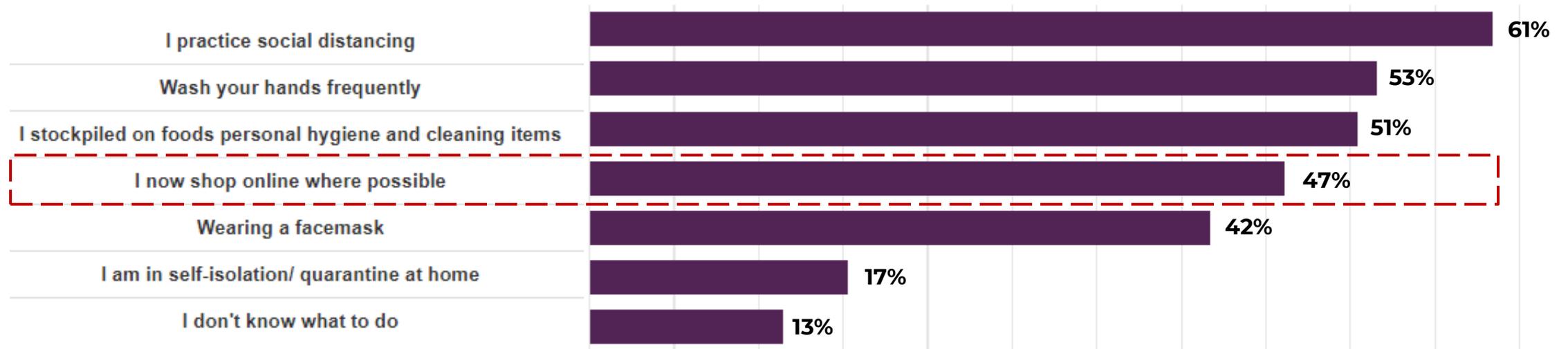
- Work
- Live
- Play
- Live
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- Work
- Play
- Work
- Live
- Live
- Live



Africans are implementing lifestyle changes to help curb the spread of COVID-19

Most people are following the health recommends, practicing social distancing and washing hands. However, a limited number are opting for self-isolation

Which of the current activities are you doing to stop the spread of the coronavirus?



KASI, "Consumer Confidence Index & COVID-19 survey", Kenya, Ghana, Nigeria, South Africa, Tanzania, Cameroon & Ivory Coast, CAPI survey, 18+, n= 3064, Mar 22 – Apr 9, 2020

Changes in shopping habits

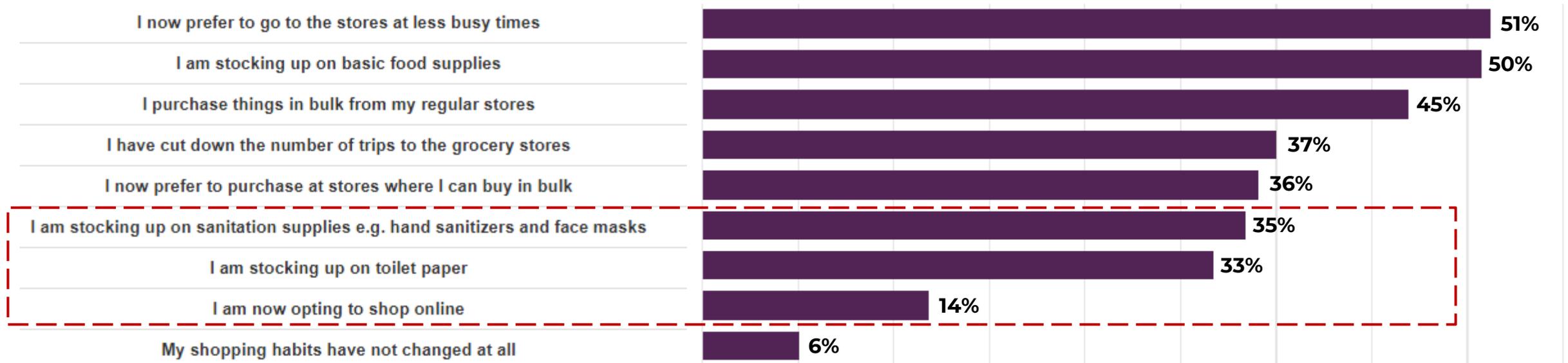


Africans also engaging in reactive health minded buying & pantry stockpiling



Changes in shopping habits focused on sanitation products similar to global trends. However, Africans are not transitioning to online shopping due to historical limitations (e.g., low penetration of credit cards, lack of delivery options/ infrastructure)

Thinking about the way you do your grocery shopping since the coronavirus outbreak, which of the following statements would you say apply to you:

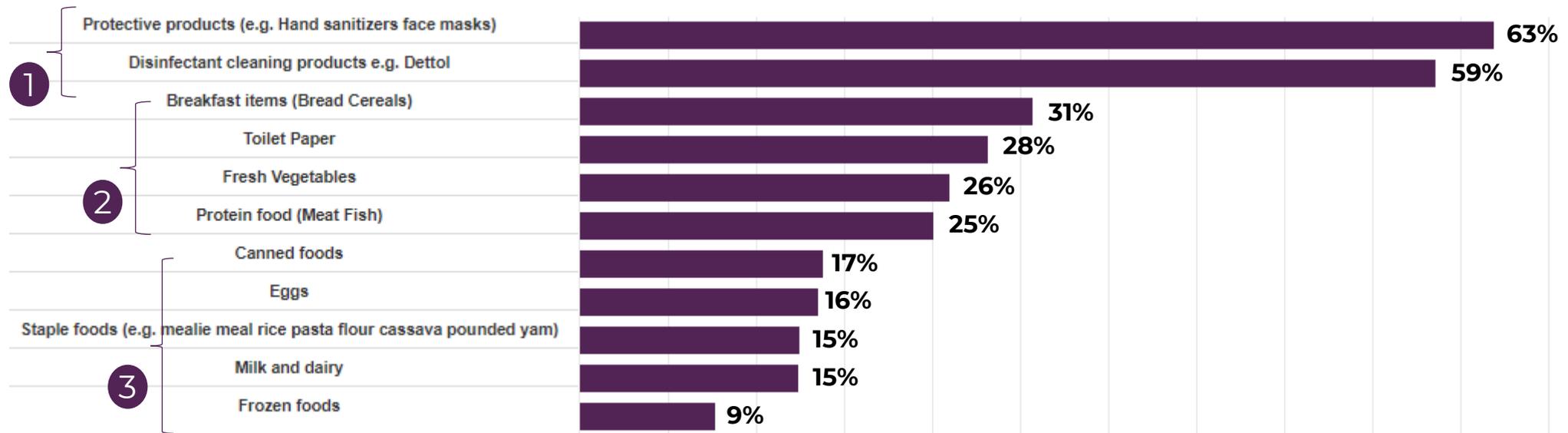


KASI, "Consumer Confidence Index & COVID-19 survey", Kenya, Ghana, Nigeria, South Africa, Tanzania, Cameroon & Ivory Coast, CAPI survey, 18+, n= 3064, Mar 22 – Apr 9, 2020

Similar to global markets, Africans cite a shortage of protective and cleaning products

Protective and cleaning products continue to be in short supply while basic products/essentials are still available.

Compared to a month ago, which of the following items are less available in your stores (mostly out of stock)?



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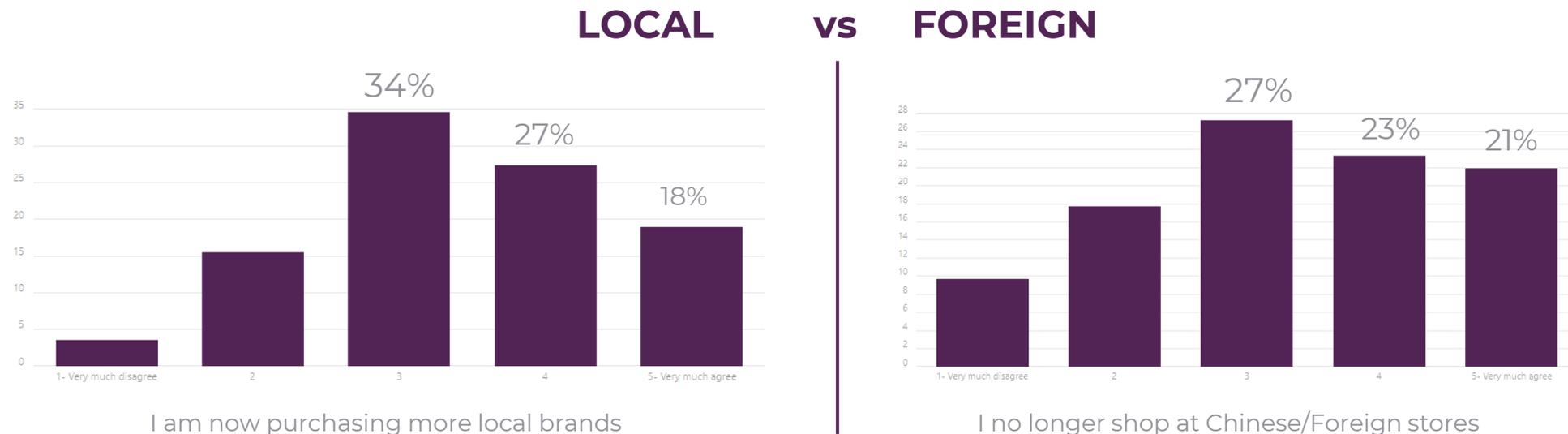
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Opportunity for local brands to seize the market

With the disruption of supply chain (border closure) and negative perception of some foreign brands (mostly Chinese), people are now purchasing more local brands, but 34% are still on the fence. Will the trend continue and is it going to translate into sales?

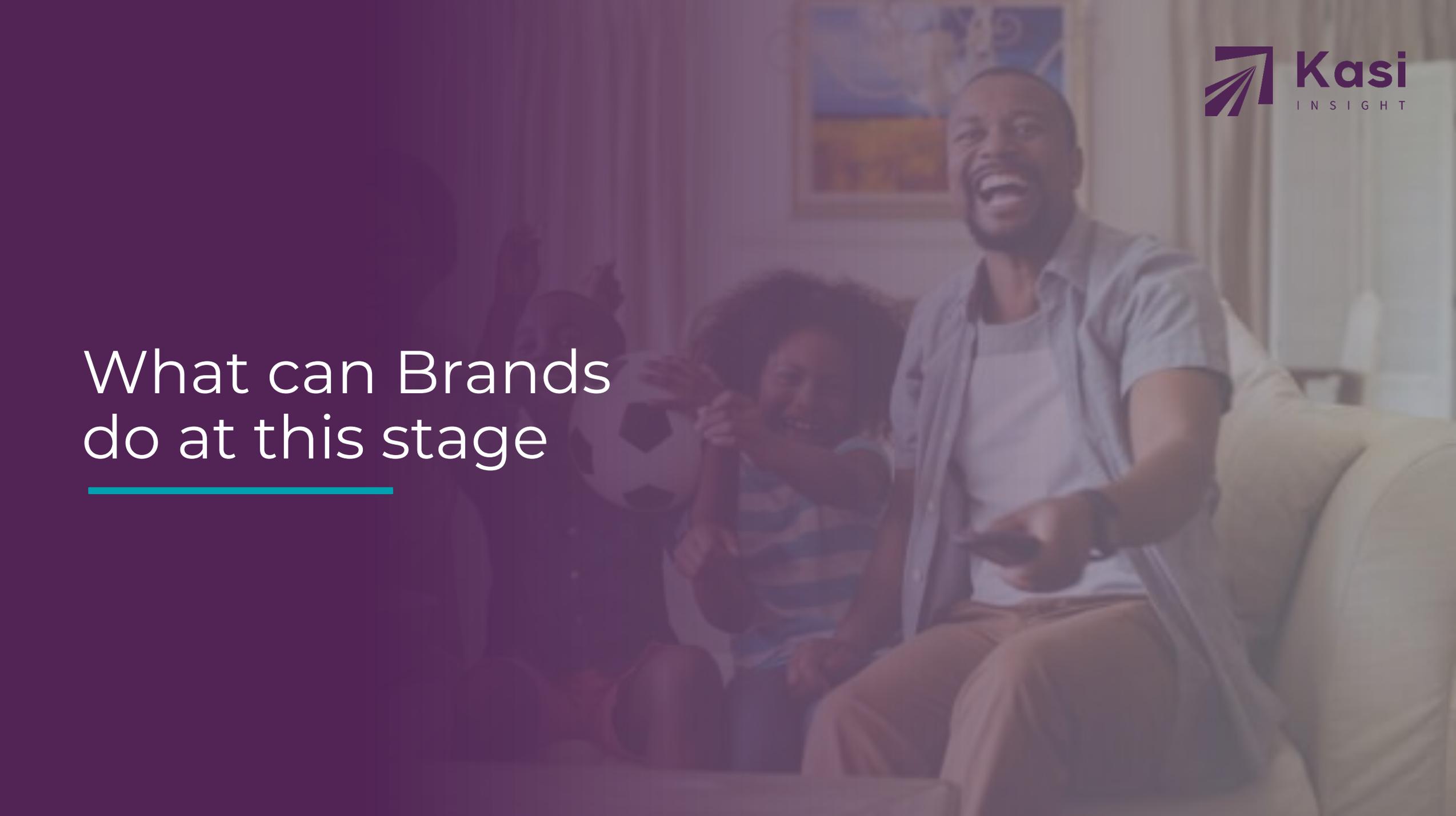
Thinking about the way you conduct your shopping since the coronavirus outbreak in your country, which of the following statements would you say apply to you?

1- Very much disagree, 5- Very much agree



KASI, "Consumer Confidence Index & COVID-19 survey", Kenya, Ghana, Nigeria, South Africa, Tanzania, Cameroon & Ivory Coast, CAPI survey, 18+, n= 3064, Mar 22 – Apr 9, 2020

What can Brands do at this stage



Africa is a tale of two cities – Adapt contextual strategies to entrench and win customers during the COVID-19 crisis



Africa has unique market and cultural dynamics, e.g., limited e-commerce access, lower income stability. Brands must focus on fundamentals, whilst utilizing Creative, Practical, Sustainable and Relevant solutions to engage customers in short-term to protect the business post-crisis

TWO KEY SEGMENTS	1. SHOW CARE & CONCERN	2. MEETING CONTEXTUALIZED NEEDS	3. ADAPT TO NEW NORMAL
Assist consumers to protect their livelihoods (Low Income)	RISK/SAFETY STANDARDS/TRUST ✓ Protect, support and reach out to customers and employees ✓ Develop emotional connection to deepen relationship and build trust ✓ Community focus – be seen as a responsible corporate citizen ✓ Remain true to brand purpose	QUALITY/VALUE/ INNOVATION ✓ Provide practical solutions to help consumers weather the storm ✓ Fluid business model, repurpose brand to meet immediate needs ✓ Focus on digital and home delivery options ✓ Where possible offer contactless options ✓ Promotion of product’s local origins ✓ Transparency of supply chain	LEVERAGE TECH/BUILD LOYALTY ✓ Build agile employee solutions for post-COVID-19 era (WFH/Gig-Workers) ✓ Safe environment for customers (PPE) ✓ Migrate customers to digital channels with enhanced experience ✓ Explore direct-to-consumer offering ✓ Cost-cutting measures to protect bottom line
Assist consumers to protect their lifestyles (Middle-class & High Income)			

Govt Role in meeting Basic Needs, determines Time Taken to Return to Normal (Public, Social & Economic Health of country): Food Security, Social Support, Education, Public Health System capability to handle virus transmission, Protocol for mass transportation, Government’s role to safeguard most vulnerable societies e.g. unemployed, homeless, immuno-compromised, Govt’s strategy for protecting economy (stimulus packages, capital injections) and reopening the economy



Just be nice

**FROM DELIVERING FLOWERS
(non-essentials)**



**TO DELIVERING PRODUCE & GROCERIES
(essential goods)**

Fresh Produce

Now available! | Next day delivery.



Ts & Cs apply

BRAND PROMISE

To deliver a world of freshness (timeously)

TANGIBLE CUSTOMER BENEFITS

Order Fresh Produce with Peace of mind

- During the pandemic people are wary of their fresh produce being handled by multiple strangers in the open store fruit stalls
- NetFlorist's system provides fresh produce, handled in sanitary conditions, abiding to all hygiene and food safety guidelines
- Help in curbing spread of COVID-19

Speedy grocery delivery to your doorstep

- Next day delivery guaranteed (compared to conventional supermarkets who had a 10day delay)
- New range of grocery essentials available for delivery
- Groceries and fresh produce are transported in specially cooled delivery vans



Increase internet usage during lockdown
(Largest Fiber Network Provider in SA)



To enabling Work and Learn From Home
(Free Fiber Internet Upgrade)

BRAND PROMISE

Join the fibre revolution and get connected to world class fibre broadband

TANGIBLE CUSTOMER BENEFITS

VALUE PROP | Free Fibre Speed Upgrades

- FREE TRIAL - customer enjoys faster internet speeds for 3 months at no additional cost
- RELEVANT VALUE – customer experiences premium package, at higher internet speeds for a reasonable period
- PERCEIVED VALUE – customer has peace of mind as faster internet speeds provide uninterrupted access for work; and more enjoyable family time e.g. video streaming services
- PRICING TRANSITION – because of exceptional experience, customers will likely upgrade to higher speed package after trial period ends



BRAND PROMISE

Authentic, Relevant African products

TANGIBLE CUSTOMER BENEFITS

Quality Product with Protective Benefits

- Increased demand for face masks as CDC now advises everyone to wear non-medical masks
- In response to COVID-19 outbreak, started manufacturing reusable face masks using the African Ankara prints
- Face masks are now a mandatory protective measure against the spread of COVID-19
- **QUALITY:** Face masks are 100% cotton, reversible, reusable and machine washable
- **USP:** Facemasks sold with matching headwrap

Corporate Responsibility

- For every face mask sold, company will be donating a free mask to local healthcare workers
- Customers are encouraged to join in this donation initiative

Demo / Q&A

Our clients

Many companies & organizations have adopted Kasi's research approach to understand the markets in Africa



Foreign, Commonwealth
& Development Office



Pernod Ricard



Associations & Accolades

Building Trust Through Prominent Research Affiliations and Alliances



**Business for Africa
and the World**
SHARM EL-SHEIKH, EGYPT, 8 - 9 December 2018

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