



Kasi COVID-19 Webinar I

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

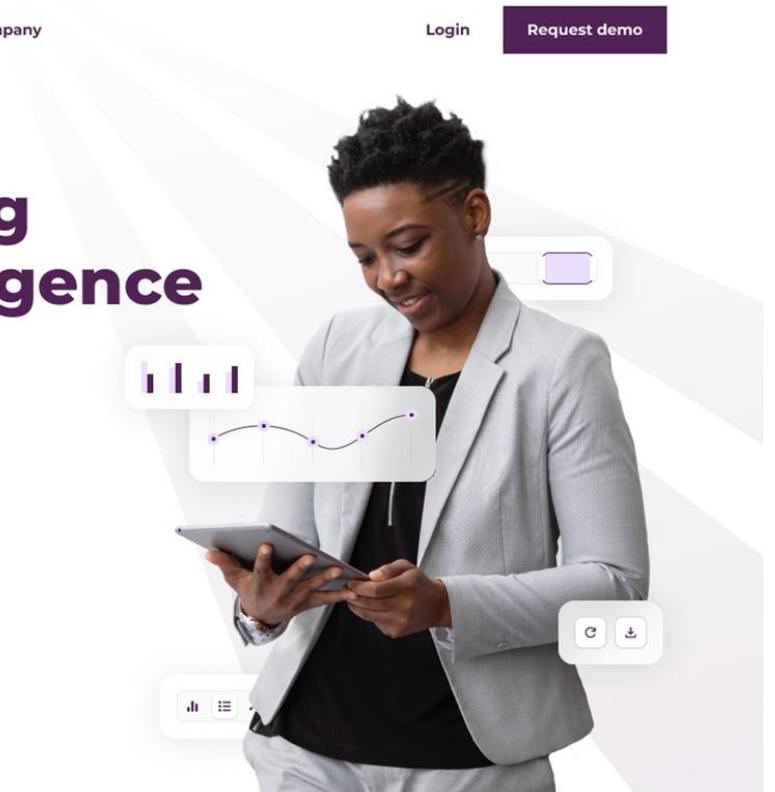
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Request demo

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.

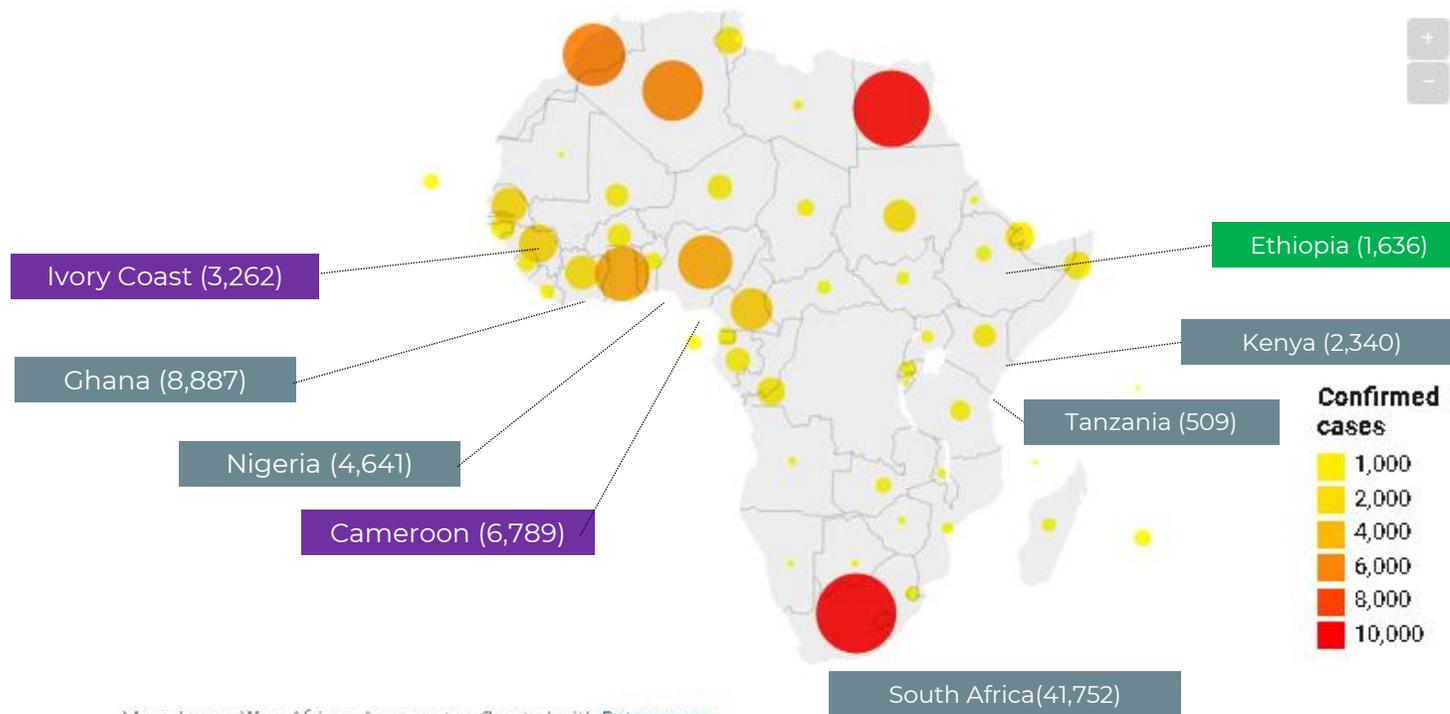
The screenshot shows the Kasi INSIGHT website's landing page for the COVID-19 Pulse survey. The page features a purple and white color scheme. At the top, there is a navigation bar with the Kasi logo, menu items for Solutions, News and analysis, About us, and Contact us, and buttons for Login and Request Demo. Below the navigation bar, there are sub-menu items for Economic intelligence, Brand intelligence, Retail intelligence, and Consumer intelligence. The main content area has a large heading 'COVID-19 PULSE' and a sub-heading 'Learn how KASI is helping companies adjust to the fast changing needs of consumers in Africa with our COVID-19 Pulse'. To the right of this text is a form titled 'GET ACCESS TO COVID-19 PULSE IN AFRICA' with input fields for First Name, Last Name, Organization, Job Title, and Work Email, and a green SUBMIT button. Below the form, there is a list of bullet points describing the survey's benefits and a 'Country Coverage' section listing Cameroon, Ghana, Kenya, Nigeria, Ivory Coast, South Africa, and Tanzania. The footer contains four columns of information: 'ANY QUESTIONS?' with contact details, 'KASI INSIGHT' with links to About, Careers, Get in touch, and Press, 'INFORMATION' with links to Help & Support, Privacy Policy & Cookies, and Terms of Use, and 'FOLLOW US' with social media icons for LinkedIn, Facebook, Twitter, YouTube, and Instagram.

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

Consumer Confidence



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

African consumer confidence at an all-time low

In line with the global indices, consumer confidence in Africa is now falling fast (27% drop from the high), the larger size of the informal economy, weak health infrastructure in Africa means the COVID-19 impact can be catastrophic

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



Learning from the past | Economies take time to recover from significant declines

Consumer confidence is an effective predictor of economic activity especially during and after a crisis. Kenya's Consumer Confidence took an unprecedented downturn during the 2017 election crisis, it took the economy two quarters to recover, and a further two years to reach a high. It then experienced a sharp decline in early 2020 following the first confirmed case in Africa.



Source: Kasi Data & Analytics, "Consumer Confidence Index - Kenya", ICS data from 2016 to 2020

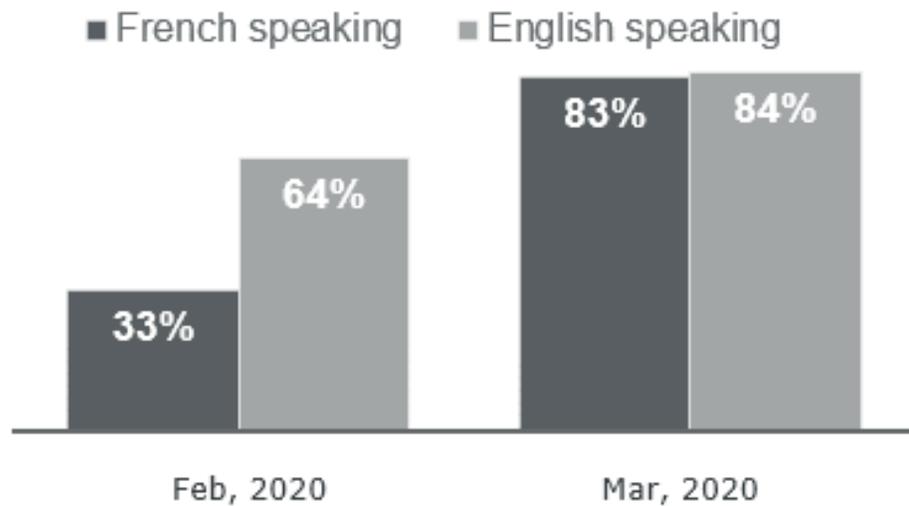
Get access to Kasi's Consumer Sentiment dataset and uncover insights and opportunities for your business:
www.kasiinsight.com/book-demo

Impact on consumer habits



Africans have serious concerns about COVID-19

Coronavirus cases in Africa have risen from under 200 to almost 10,000 over the course of March, leaving the majority of Africans with serious concerns about the spread of the disease

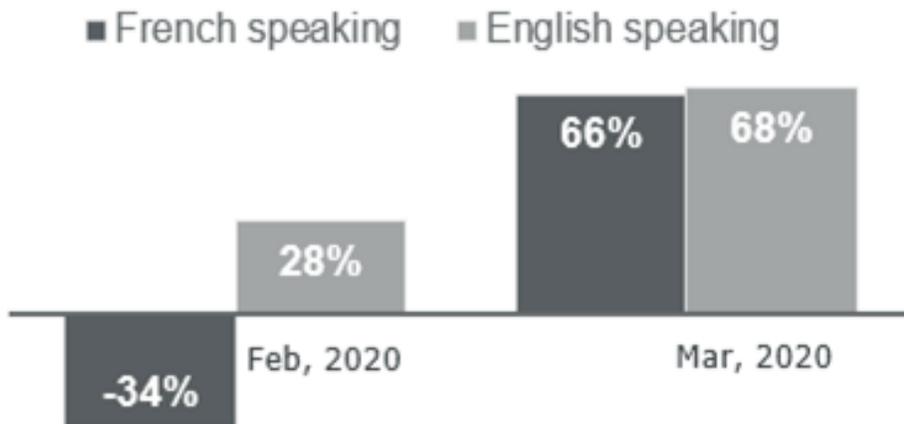


Q: How concerned are you with the coronavirus?



COVID-19 fear index

Respondents from the English-speaking nations have maintained similar levels of concern month-on-month. Significant increase in COVID-19 fear amongst Francophone countries as the number of cases rose over the past month, however they appear to be less affected than their counterparts

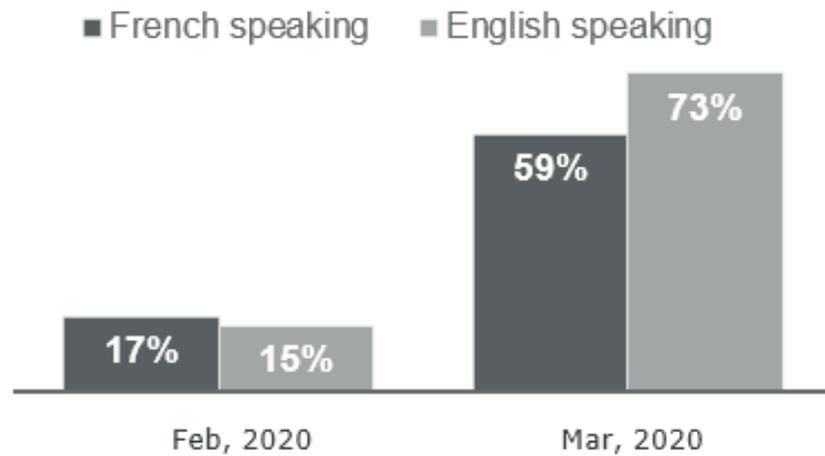


(% who are concerned – % who are not concerned)

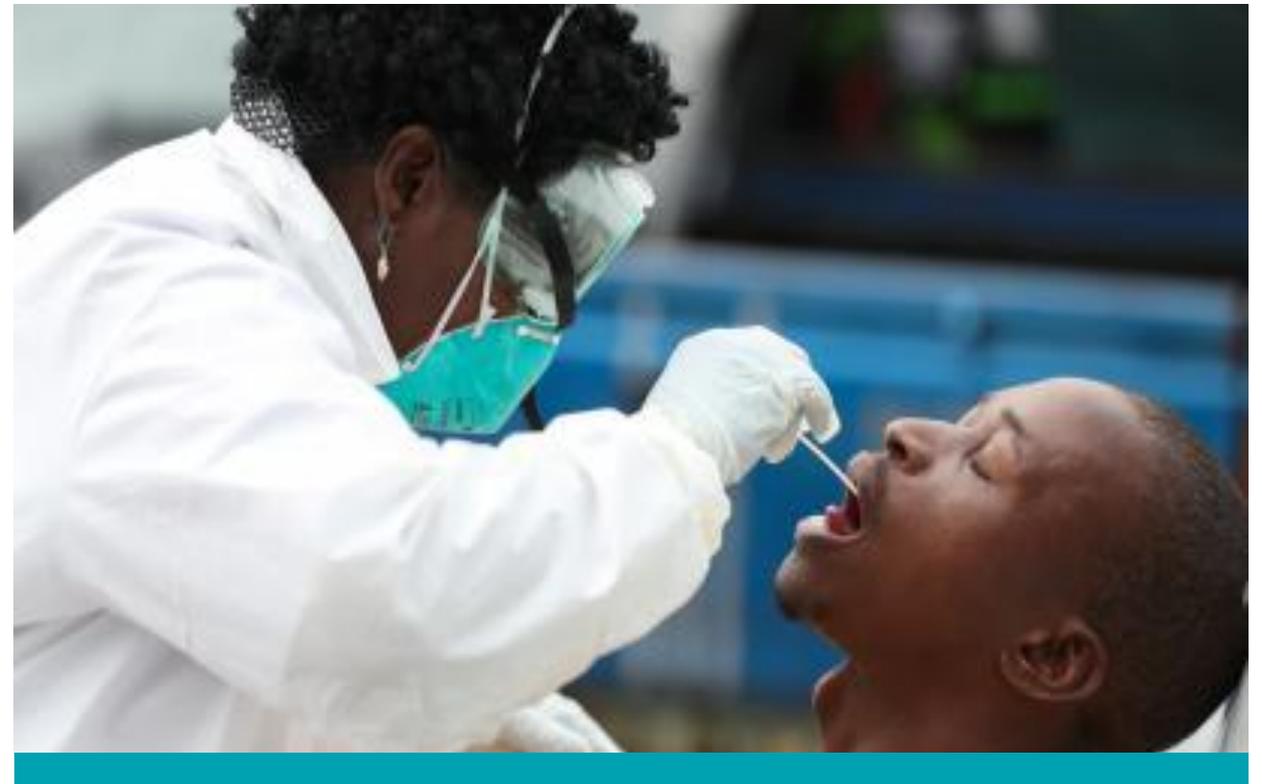


Africans don't expect to be personally affected by COVID-19 even as crisis deepens

Though the virus is rapidly spreading across the continent, Africa constitutes just under 1% of total cases globally. Only 15% of respondents know someone/know of someone who tested positive for COVID-19. As number of cases increase, this sentiment will probably shift

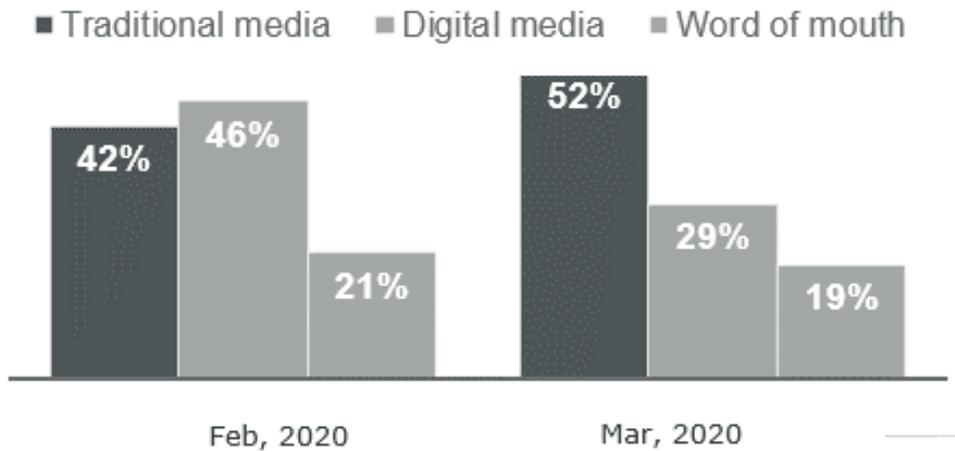


Q: Do you or someone you know expect to be affected by the coronavirus?



Sources of information about the coronavirus

As the reality of COVID-19 hits Africans they are relying more on traditional media and word-of-mouth rather than digital media to keep informed about the coronavirus



Q: How are you staying informed with the most current information about the coronavirus?

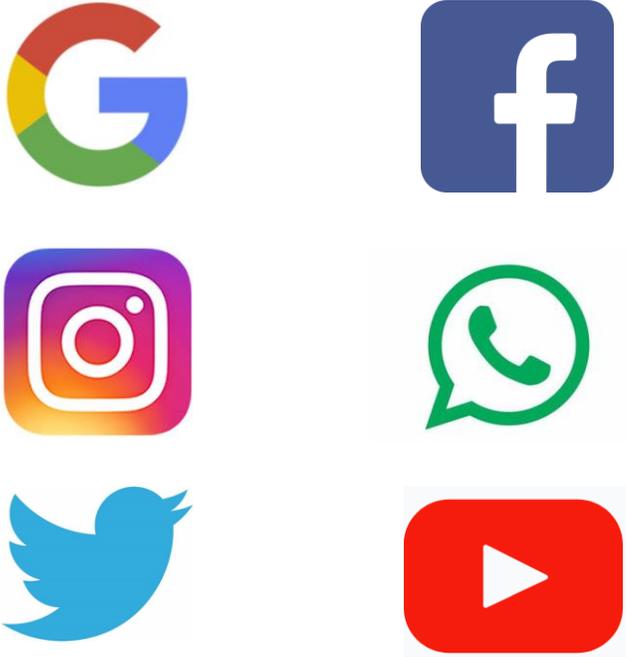
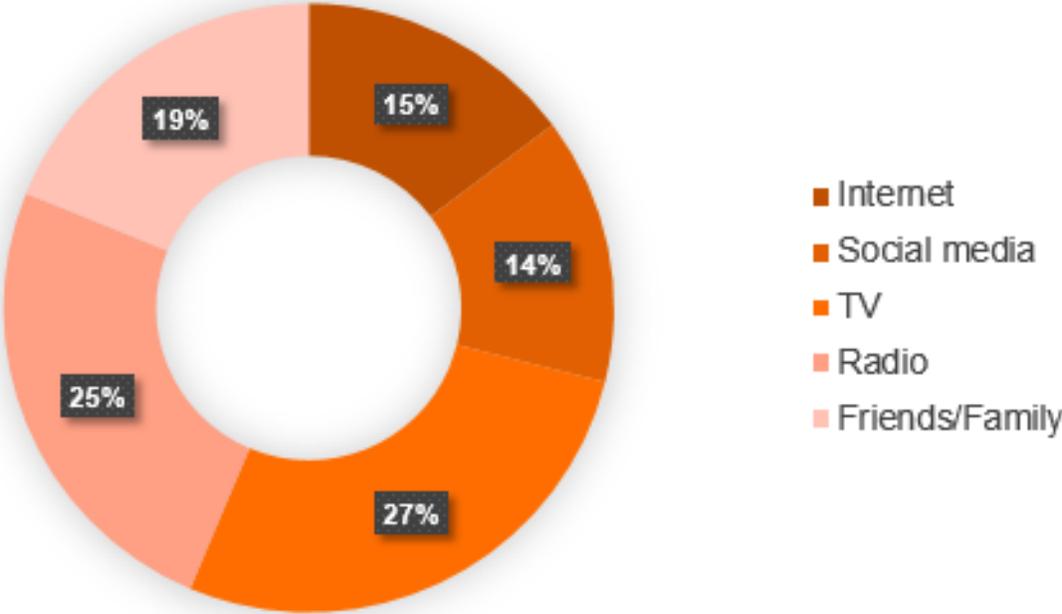
- **Digital media** includes Social media & Internet
- **Traditional media** includes TV & Radio
- Word of mouth includes Friends & Family

A lot of the govts were holding press conferences and disseminating information through national media addresses during this time, contributing to the reliance on TV and Radio



Media trust and misinformation

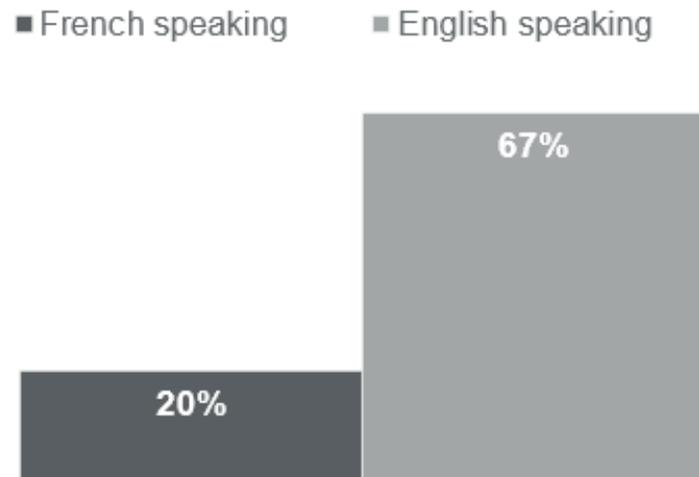
TV & Radio considered to be the most reliable information channels. Though internet searches and social media are used extensively they have often been sources of misinformation



Q: Which channels do you consider to be the most reliable when it comes to informing you about coronavirus?

Majority of English-speaking respondents believe their lives have been impacted by COVID-19

Most of the English-speaking respondents reside in countries where governments have taken stringent measures to curb the spread of COVID-19. A number of countries are under national lockdowns which are enforced by the military



Q: Have you changed your lifestyle and daily routine in any way specifically because of the coronavirus? (Yes Responses)

Coronavirus Outbreak

Cameroon City Makes Wearing Mask Mandatory in Fight Against Coronavirus

By VOA News
April 07, 2020 01:18 AM

Markets

Nigeria Fines Popular Actress for Throwing Party During Lockdown

Economics

Ghana Urged to Consider Tax Breaks to Ease Blow From Virus

Politics

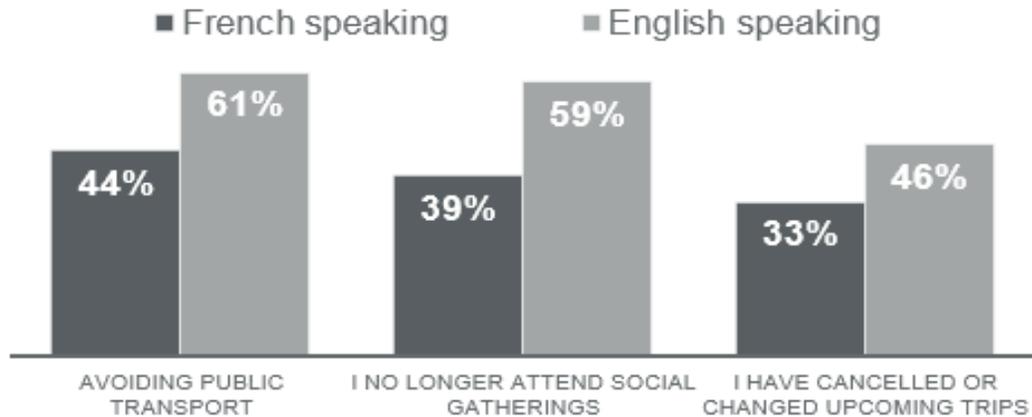
South African Political Divisions Extend to Virus Response

Coronavirus: Ivory Coast protesters target testing centre

Some of the recent news headlines: Bloomberg, VOA, BBC

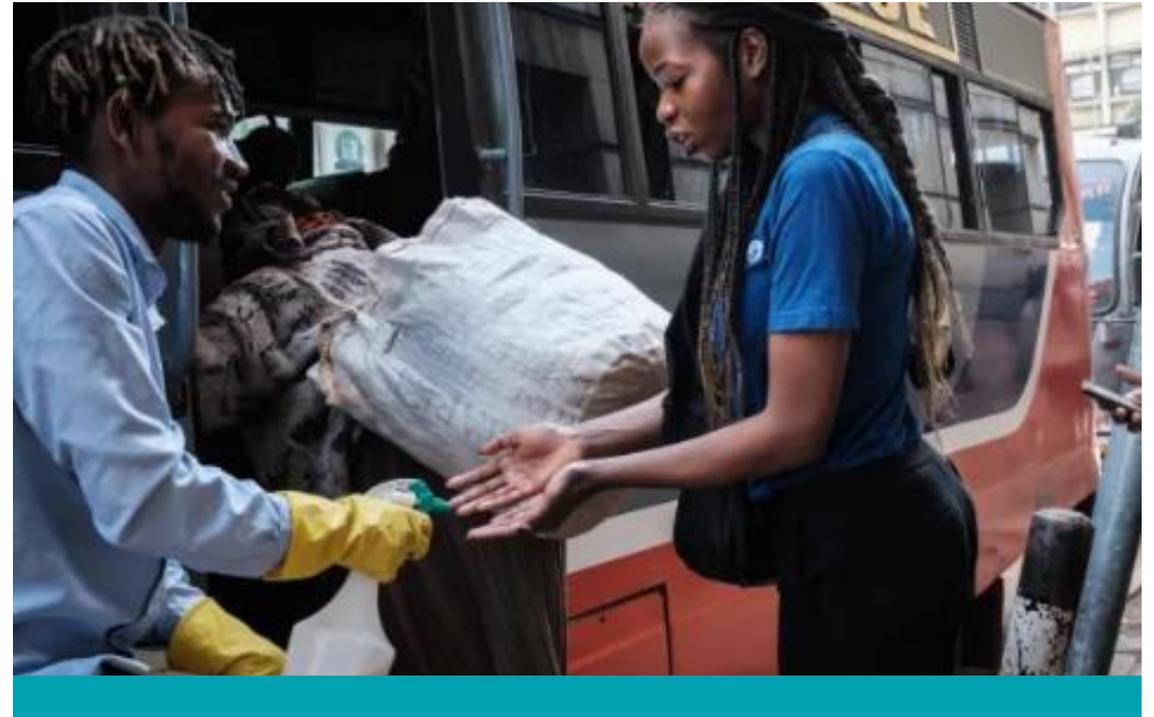
Africans cite that their lifestyle and daily habits have been impacted by COVID-19

Respondents in Francophone countries are less concerned about the virus hence their lives have not been impacted to the same extent as respondents in English speaking countries



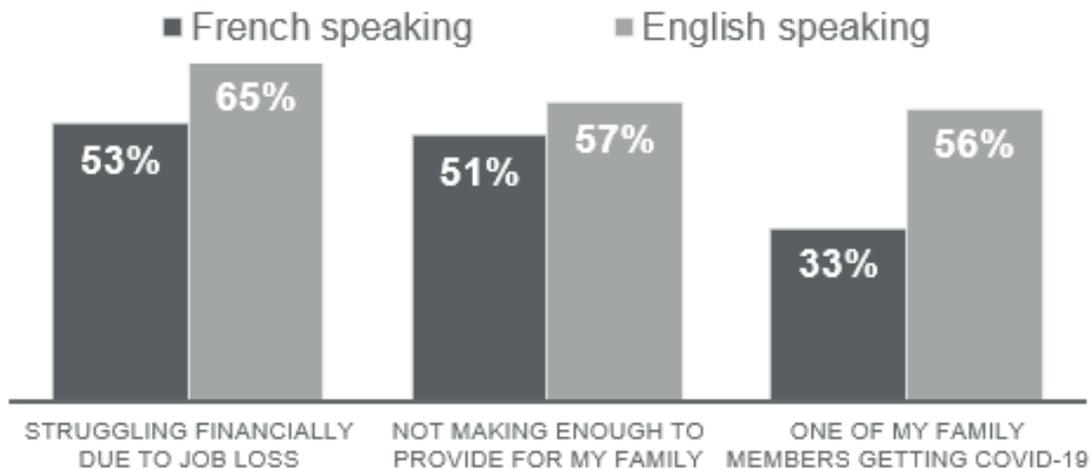
Question: Which of the following applies to you when it comes to how your life/daily routine changed because of the coronavirus?

- **French speaking** countries include Cameroon & Ivory Coast
- **English speaking** countries include Ghana, Nigeria, South Africa, Tanzania, Kenya



In Africa, COVID-19 is primarily an economic crisis, the health threat is considered secondary

Due to high unemployment levels and limited job security in Africa, respondents are primarily concerned about the economic impact of COVID-19, and their ability to provide for their families. The sentiment is shared across all countries and regions.



Question: What are you most worried about or concerned about the coronavirus? Top 3

- **French speaking** countries include Cameroon & Ivory Coast
- **English speaking** countries include Ghana, Nigeria, South Africa, Tanzania, Kenya



Brand relevance during COVID-19



COVID-19 presents economic challenges, however business opportunities exist through provision of value and building trust

PREPARE

- **Brace for Economic challenges**
– consumer confidence is down, slowdown in overall economic growth is imminent disruption in global supply chains, and limited Foreign Direct Investment
- Despite relatively low prevalence of cases in Africa, to date, the **COVID-19 outbreak is likely to lead to economic contraction** due to disruptions in business, job losses, stunted GDP growth, as govts impose stringent measures to limit the spread – travel restrictions, event cancellations, border closures and national lockdowns,

PLAN

- **Plan for a Health crisis that will impact consumer spend.** As infection rates rise major public health challenges are likely to follow – prevalence of Malaria, HIV, & TB make Africans more susceptible to COVID-19
- Due to nature of the continent’s socioeconomic status (mostly under-employed or self-employed) **consumers will be strained**, and small businesses may struggle to recover
- Plan for the “New Normal”, COVID-19’s Economic and Public health impact has already impacted consumers’ shopping behavior and lifestyles

ACT

- **Business Unusual: Respond, Reposition, or Repurpose** your brands/business to meet the new market needs
- **Build trust** in the community and assist in the humanitarian efforts to deal with the pandemic
- **‘Local is Lekker’** – Consumers are vulnerable, generally have a mistrust of foreign brands and initiatives. Reassure consumers, show real value and capitalize on this opportunity

CASE STUDY | Shoprite's success is driven by its consistent and single-minded focus on serving low-income segments

Committed to supporting core customer base



Oceanview is a poor, gang and crime-ridden area in Cape Town, South Africa. It's a township for poor 'coloured' people who were forcibly removed from white areas during apartheid, and residents are largely unemployed with social challenges. There are **no shopping malls in the area and residents would face challenges to travel to larger townships**, such as Fish Hoek to buy groceries during the country's 21-day lockdown in March 2020.

Relevant Proposition – mobile store



Shoprite, Africa's leading food retailer, saw the need in the community and the challenge the lockdown would present (saving travel cost and time), particularly for the elderly and immunocompromised. Shoprite launched its mobile supermarkets in March 2020 to serve the Oceanview community **reinforcing its support for its core target audience** and providing value through a relevant shopping solution

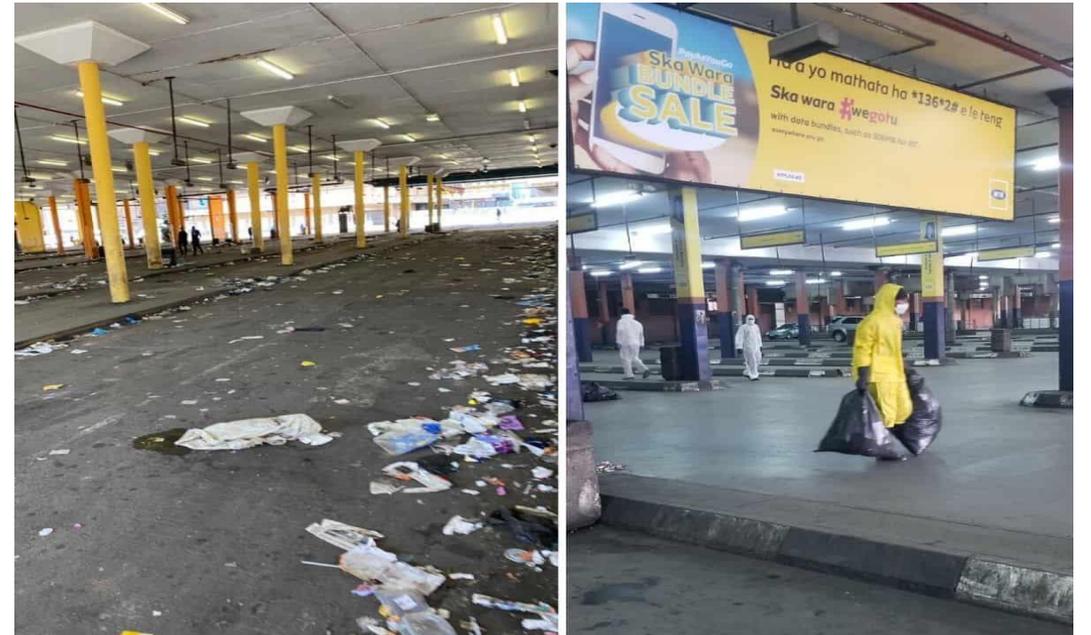
CASE STUDY | OUTsurance wins the hearts (and wallets) of taxi owners by prioritizing their health and safety

Prioritising consumer safety & well-being, creates trust, and builds loyalty



Over 60% of South African commuters use minibus taxis daily. Because of the high volume of commuters, the taxi ranks are breeding ground for germs and spreading disease. In support to the COVID-19 outbreak, **OUTsurance**, a South African short-term insurance provider, in collaboration with MTN and SA Taxi Association started **an initiative to disinfect Gauteng taxi ranks** every three days, they also **provided taxi drivers with masks, gloves and hand sanitizers** to protect themselves and their customers to curb the spread of COVID-19.

Relevant Proposition – Taxi Rank Disinfection



Images above show the Before and After pictures of MTN taxi rank, the largest rank in Johannesburg, Gauteng province. **OUTsurance remains true to their motto “You always get something out”**, as they protect existing and potential customers by sanitising their minibus vehicles daily, disinfecting the taxi ranks regularly, and sanitising commuters, **creating trust and an affiliation, and opening business opportunities** amongst the tight-knit community of self-employed taxi drivers

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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