

BrandMapp 2021 demystifies pandemic influence on SA shopping landscape

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As with every other aspect of life, the pandemic has changed how and when we shop, as well as where and what we buy. Consumers have gone digital and tried out new delivery modes, as well as switched brands and relentlessly shopped for value. There's talk of the 'homebody economy' firing up DIY, hardware and gardening sales; and the 'nesting economy' that's emerged from our focus on our home-bound creature comforts. When it comes to this radical disruption of our shopping habits, it's hard to get a handle on what's really happening with South African consumers, and where we're heading.



But now, with the release of the latest [BrandMapp](#), 30 000 South African consumers have spoken in-depth about their shopping over the first pandemic year. For the past eight years, the release of the unique annual BrandMapp survey offers data insights that brand owners and marketers can't get anywhere else. This year, there's naturally been a Covid-inspired edge to the anticipation of the latest consumer research as businesses grapple with understanding the pandemic impacts on consumers, and struggle to split hype from facts.

BrandMapp specifically surveys South Africans living in households with a R10,000+ monthly household income. While that's a 30% segment of the population, they do make up 80% of the country's taxpayers and dominate consumer spend in the formal economy. And, having held back the 2021 survey until consumers were free from severe restrictions, BrandMapp is now in a special position to provide a trended view of this segment of South Africans and reveal how they are thinking and behaving in the new Covid-19 reality compared to the carefree days preceding the pandemic.

BrandMapp director of storytelling, Brandon de Kock, says: "We're looking for the stories that the data gives us that go beyond the obvious, of course, there will be more online shopping and accelerated e-commerce penetration in South Africa in 2020. Sure, we cooked a lot more home meals. And yes, we got caught up in the bulk toilet paper buying fever from time to time. That was simply shopping behaviour driven out of necessity in locked down populations across the world, and we were no different. What's far more interesting is finding insights and clues that will answer the most pressing questions we



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Brandon de Kock, BrandMapp 26 May 2020



Shopping mind-states

As part of deep and wide interrogation of shopping habits and store usage, BrandMapp also charts a view of 'shopping mind-states' and the results haven't really changed much over the past year. The three, top mind-states are still: 57% of SA mid to top-income shoppers prioritise price through sales and discounts; 45% are loyal to brands they know and trust; and 44% say that quality is more important to them than convenience.

"It's a sign of the times that saving cash is top of most people's minds," says De Kock. "The pandemic might have made things worse, but the economic concerns which prompt price-driven behaviour have certainly pre-dated Covid in the country. The concepts of brand loyalty and quality over convenience are also not new priorities for SA shoppers, though we have seen a hiked response to quality in 2020, which is likely to have been pandemic-driven. It makes sense, homebound and facing a global health crisis, we've been thinking more about the food we are eating and noticing more about the quality of things we have in our homes. What's most interesting though is that these three factors are so much more prioritised than the other highest-ranking metrics. One thing that continues to stand out is how low eco-friendly purchasing is as a priority in SA. It's a bit sad, but probably speaks to the combination of being chronically financially stressed and the fact that responsible consumerism in SA typically comes at a premium price making it a privilege of the super-wealthy no matter how concerned most of us are about the state of the environment. Realistically, how many people can afford almond milk and meat-alternative burgers?"

As an extensive and versatile dataset, BrandMapp 2021 offers endless options when it comes to applying filters and drawing insights. This next snapshot of the generational breakdown sheds light on how different life stages impact on shopping priorities, revealing that price deals and quality are much more important to younger South Africans than retirees.

Shopping online

Not unexpectedly, SA joined legions across the world in shopping online during the first pandemic year. BrandMapp 2021 reveals that 93% of respondents shopped online, a significant uptake over 2019. De Kock says: "What's notable is to draw the distinction between traditional online shopping categories such as fashion, books and electronics – that we've been increasingly comfortable supporting for the past few years – versus provisioning online, which is about buying your usual food and grocery items, favourite wines and other necessities. It's in provisioning where we saw an incredible boom in the e-commerce space. Movement restrictions, alcohol bans and health anxieties drove unprecedented numbers of South Africans online to get the basics of life. In the process, many have now learnt how to do online shopping, and have had the chance to get really good at it. They've also experienced the joys of grocery and alcohol deliveries to their doors. We've experienced that somebody else can actually do our provisioning for us. This has been a significant, probably game-changing, disruption to middle class South Africa's shopping habits and rituals."

To find out more about BrandMapp 2021, visit www.brandmapp.co.za

This year, you can win a BrandMapp Brand Profile worth R62,000! Simply complete the entry form on www.whyfive.co.za/competition/. The Brand Profile includes a bespoke results presentation by Brandon de Kock (BrandMapp's director of storytelling) and a full pack of hundreds of useful insights about your customers.

About BrandMapp

BrandMapp is a unique South African dataset that uses a mega-sample of more than 30,000 respondents to profile the 12

million adults who live in mid to top-income households earning in excess of R10,000 per month. Now in its eighth year, the [BrandMapp](#) survey is a bespoke, independent survey created by [WhyFive Insights](#) in partnership with leading digital platform marketing and research group, [SilverstoneCIS](#).

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