

5 YEARS SINCE IT ALL CHANGED

— *Or did it?*

AUTHORS:

Robert Grace
*Co-founder & Chief Strategy Officer,
The Up&Up Group*

Jenni Pennacchini
*Managing Partner,
KLA*

ANALYSTS:

Tinashe Mukarati
*Data Analyst,
The Up&Up Group*

Rakhee Naik-Vassan
*Managing Consultant: Insights,
KLA/YouGov*

THOUSANDS UPON
THOUSANDS OF WORDS
WERE PUBLISHED
ABOUT HOW OUR LIVES
WOULD NEVER BE
THE SAME AFTER THE
COVID-19 PANDEMIC
TOOK EVERYTHING WE
KNEW AND TURNED IT
ON ITS HEAD: THE “NEW
NORMAL”.

Were we going to shift our whole lives online, never to venture into a shop again? And were we really going to master the art of making sourdough bread?

Businesses “pivoted” and built strategies to be relevant for the post-pandemic consumer and employee. However, we already know that Dr Karen Nelson-Field from Amplified Intelligence shared a research study in 2023 about digital advertisements that didn’t reach the attention threshold of 2.5 seconds. In essence, 85% of digital spend is poured down the drain. This, together with many other post-pandemic data points, is bringing about a new wave of questioning the status quo and what marketing effectiveness truly requires today.

And so the questioning and introspection has begun. For businesses to be able to be precise with their positioning and to resonate with audiences of today, they must know what, if anything, has changed since the lockdown. They must ask: What is required to build closer relationships with my customers to increase market share, brand loyalty and – of course – my bottom line?

But five years later, what has truly changed? For businesses to resonate with today’s consumers, they must understand shifts in behaviour and sentiment. The Up&Up Group and KLA analysed South Africans’ perspectives across five key dimensions, leveraging YouGov Profiles data collected over the last five years from over 4,000 respondents across three personal income groups, low (R8,000pm or less), mid (R8,001pm – R40,000pm) and affluent (R40,000pm or more).

01/ Mental well-being: MOVING BEYOND LIP-SERVICE

Many argue that we have shifted from a coronavirus pandemic to a mental illness pandemic. An important benefit of all the attention mental illnesses have received since the start of the pandemic is the significant decline in the stigma associated with talking about the topic.

54% of South Africans agree with this point, an increase of 14% since the pandemic.

However, while the overwhelming majority of South Africans (85%) say

it is important to talk about mental health, more than half feel alienated by modern life, a significant increase of 10% over the past 5 years. Added to this, the middle and affluent income segments increasingly agree that they experience anxiety about life, but this is not as prevalent as it is among the lowest income group.

In other words, while awareness around mental illness has increased and the stigma surrounding it has decreased, there hasn't been a shift in people's perspectives of their own mental well-being. In the middle and affluent income groups, perhaps the always-on demands of a hybrid work-life haven't helped. Among the lower income earners, the more pressing and urgent demands of getting through the day mean mental well-being isn't a top priority. For

the employed, work is becoming less fulfilling, with a growing trend of people seeing work as a functional activity just to earn a living – this is across all income groups.

Key consideration:

A mentally well society is in everyone's interest. It is something every business should be investing in across their value chain if they are to enjoy more productive outcomes across their teams. Businesses need to be clear and intentional about the role they play in promoting holistic well-being by meeting people where they are, reinforcing agency and enabling real, attainable connections to themselves and others.

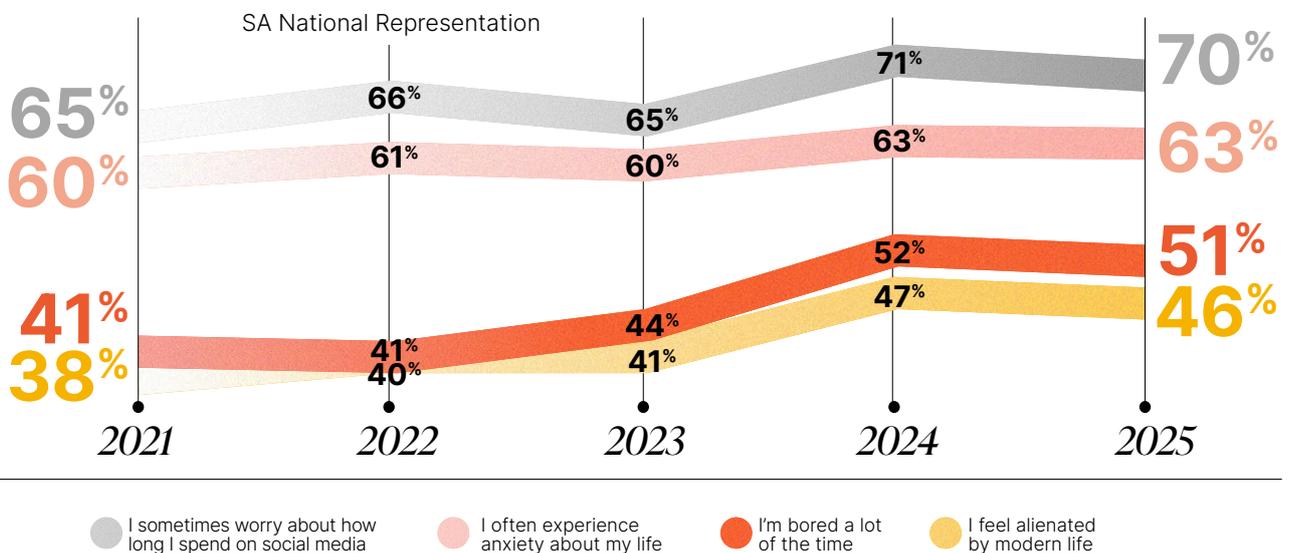
02/ Lifestyle: CAUGHT IN A TRAP

As we discovered in the previous section, anxiety levels are on the rise across the board, with growing feelings of alienation from modern life. Accompanying these growing feelings of alienation, 70% of South Africans worry about excessive social media

use. Yet, despite this, 46% of the population say that they are bored a lot of the time.

While staying in for the night remains just as appealing as it was before the lockdown, those who can afford eating out, do so >

AN INCREASINGLY ANXIOUS AND BORED CONSUMER



Source: YouGov Profiles (2021-2025); n=3222 -

more as a convenience than a luxury. Perhaps this has been brought about by increasingly busy lives, load shedding and, in many areas, water supply issues.

Interestingly, despite what can be interpreted as having less inspiring

everyday lives, the desire to travel is growing across all income levels, but affordability remains a concern.

Consumers seek last-minute deals and off-peak travel to fulfill their aspirations.

Key consideration:

The brands that win the hard-earned money of consumers will be the brands that don't just solve a problem for the consumer but also provide an experience that makes consumers feel good about the choices they've made.

03 / Retail therapy:
SHOPPING THE UNATTAINABLE DREAM

Aspirations remain remarkably high, with 66% of South Africans willing to pay more for luxury brands, one of the largest increases across statements for all income groups. South Africans' appetite for premium

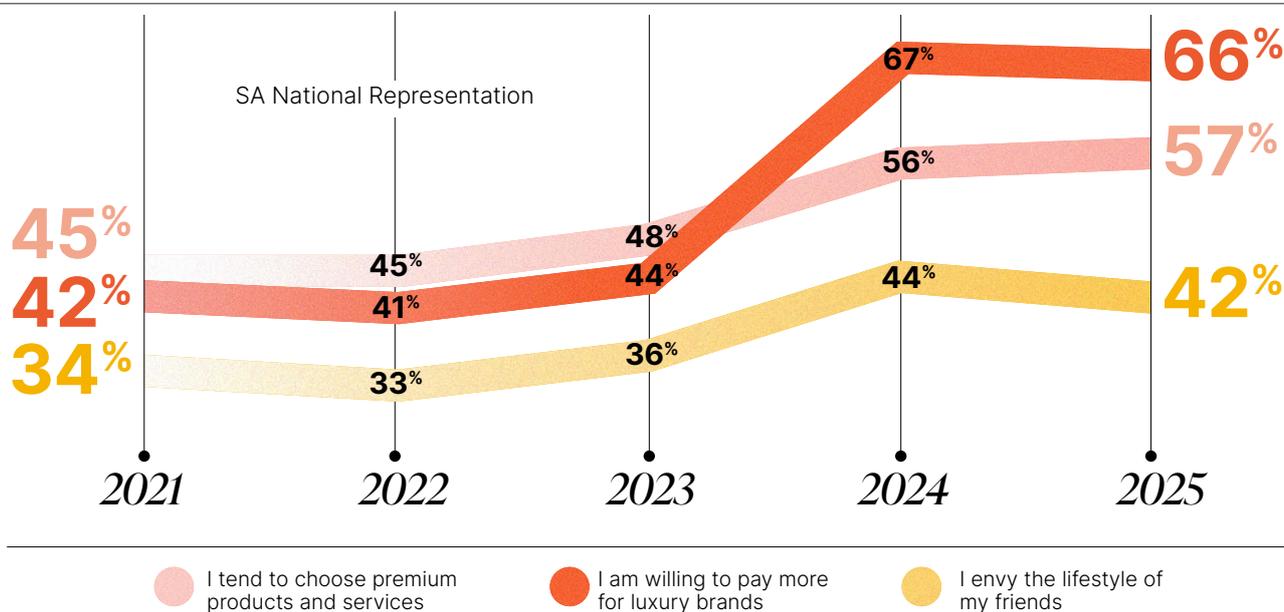
products is more than double that of Americans, where only 30% of the population there agree with the statement.

However, while people are willing to trade up, value-for-money concerns are rising, with an 8% increase in people willing to pay more for quality. At the same time, 42% of the population are likely to envy the lifestyle of their friends, compared to just 27% in the USA. No doubt this is being driven in part by social media and

influencer culture. Could this be fueling unattainable aspirations and possibly contributing to the growing levels of anxiety?

And while the pandemic naturally accelerated online behaviours, with all income groups agreeing that "online shopping has made life easier", for the middle and affluent segments, the need for a tangible shopping experience has increased: more than 70% of them say they prefer to touch and feel products before they buy them.

SA'S ASPIRATION LEVELS SURGE



Source: YouGov Profiles (2021-2025), n=3,371-5,662

Key consideration:

A previous CMO of the US discount retail giant Target talked about their success as being their ability to "talk to who people want to be, not who they are", and of course provide

the goods and tools to help them achieve that. Regardless of what category you're in, think about, and be sure to articulate, the progress you bring to people's lives. And do so in a way that delivers a tangible, immersive buying

experience in an omnichannel solution. Brands need to understand the value equation they are delivering – this is the understanding that more affordable is not the primary objective, but delivering value is.

04 / Finances: SPREADING THE RISK AND THE REWARD

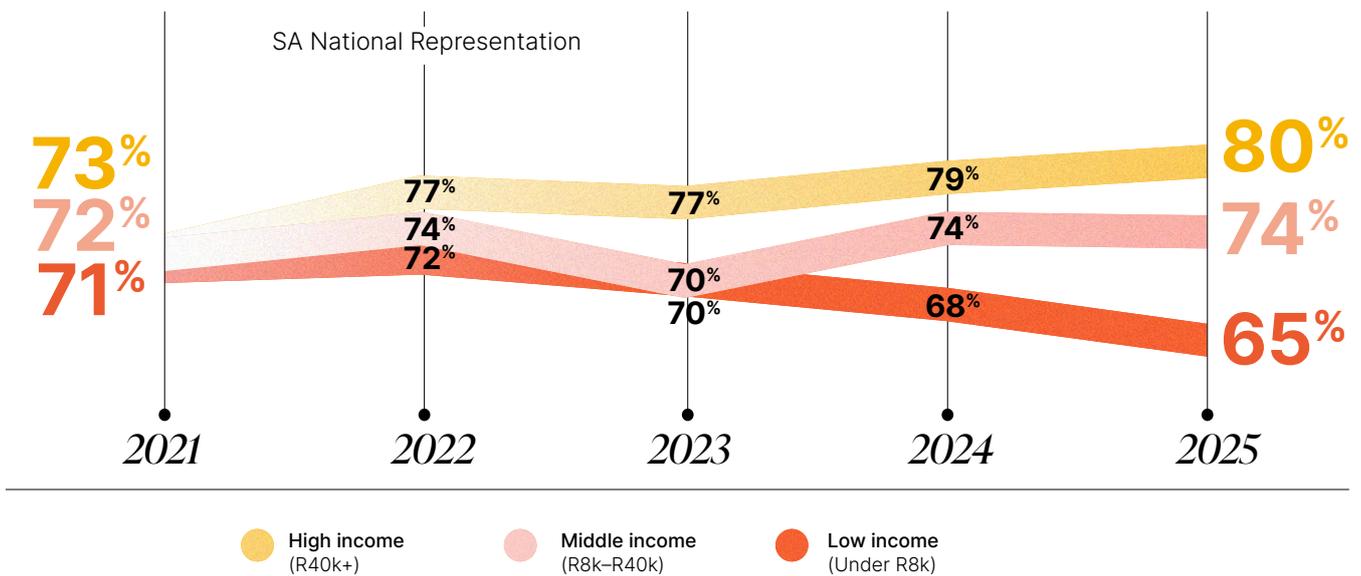
South Africans are generally feeling far more positive about their finances, with 68% of the population saying they “feel better off than they did a year ago”, compared to only 47% of Americans.

However, when broken down by income this confidence is primarily driven among the affluent segment,

while lower-income earners are much less optimistic than five years ago, which speaks to the uncertainty this segment has to navigate on a daily basis.

Interestingly, on opposite ends of the scale the lower and affluent segments are more likely to have more than one bank account, no doubt for different reasons.

I AM CONFIDENT AND EXCITED ABOUT MY FUTURE



Source: YouGov Profiles; n=3258 – 5761

Whilst the affluent segment is feeling much better off than they did five years ago, they are more inclined to talk to a professional before making financial decisions which indicates growing levels of confusion when it comes to financial matters. This confusion is perhaps brought on by both global financial instability and choice paralysis in the financial services category available to this segment.

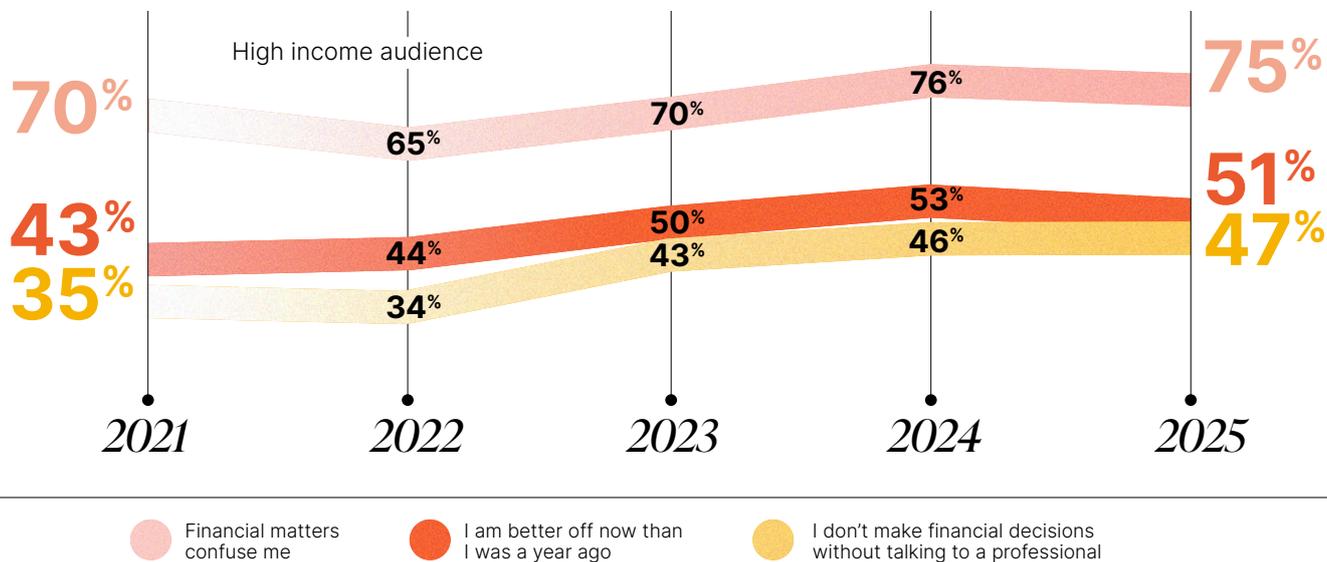
Across income levels, South Africans are more willing to take financial risks, something they may see as a necessity to realise growth amidst market uncertainty.

On the other hand, there is increased access to technology and online banking channels, which allows for increased engagement in activities such as online trading and alternative investment options.

Key consideration:

In the face of growing complexity, or adversity, all segments are looking for real solutions that help them better manage their finances and drive financial stability in their lives. Successful brands will be the ones that can tangibly meet consumer aspirations and needs.

SA'S AFFLUENT SEGMENT CONFIDENT ABOUT THE FUTURE, BUT WANT GUIDANCE



Source: YouGov Profiles, High income [R40K+ pm] (2021-2025), n=619-1,639

05 | Outlook:

APPREHENSIVE AND SCEPTICAL

Political disillusionment has not only brought about apathy, but also a sense of disempowerment. Interestingly, 60% of the general population agree that “this country is going to the dogs”, which is 7% higher than during the pandemic.

However the perception gap in this statement is evidenced between the trend line of the lower income segment (an increase of 12% agreeing with this statement) and the affluent segment, where this outlook has actually declined. This could be as a result of the affluent segment’s ability to shield

themselves from service delivery issues, as well as a broader acknowledgement of the possibilities that the government of national unity may represent.

Against this backdrop there has also been a decline in the average South African believing that they have the power or agency to help influence important changes that can shape the future. The lower income group shows the largest decline (-8%) since 2021.

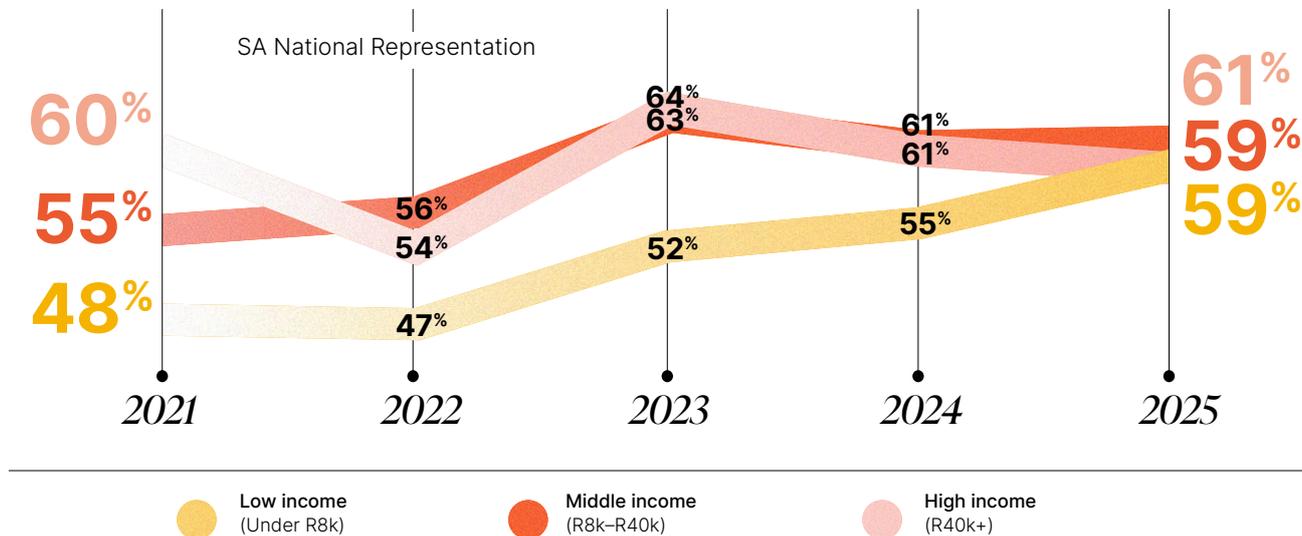
The country is seeing increasing levels of scepticism. Since the start

of the pandemic, trust in advertising has dropped by 8% – this is across all income groups. Today, almost 6 in 10 South Africans say they feel overwhelmed by advertising. This feeling is most resonant among the lower and middle income groups, with 9% and 4% increases respectively since 2021.

Although 71% of South Africans say they like brands that are willing to get involved in social issues, more than half of them say they still don’t see their lifestyle represented enough in advertising, highlighting a disconnect.

THE DIFFERING VIEWS OF SA'S TRAJECTORY IN DIFFERENT INCOME SEGMENTS

Response when asked if "this country is going to the dogs"



Source: YouGov Profiles (2021-2025); n=421 - 2904

Key consideration:

In a world of increasing instability, consumers are longing for acknowledgement and

empowerment. The opportunity for brands is to authentically bridge this gap and connect with them in authentic and resonant ways.

Importantly, this goes beyond how they advertise themselves and extends to how their products and services cater to this need.

The key takeout for brands:

ELEVATE & ALLEVIATE

Five years post-pandemic, an interesting picture of dichotomies emerges.

Trends such as the growth in online behaviour are to be expected – this includes online shopping for convenience. Yet, this is contrasted with growing concerns about the amount of time that is being spent online.

Similarly, sentiments that point towards a sense of financial recovery after the pandemic are to

be expected, but financial caution remains.

On the other hand, there is a narrative emerging about the long-term impact of an online life, accompanied by a sense of disillusionment.

Significant aspiration levels across the board point to a need to feel good, a need to escape from the realities of a busy and demanding life. We've seen the rise of increasingly savvy consumers who

seek out products and services that add value to their lives – beyond price alone. The increase in anxiety, apathy and a perceived lack of agency suggest a need for confidence and empowerment.

Businesses that navigate these contradictions effectively, meeting aspirations while easing concerns, will emerge as market leaders.

The key question remains: How can brands alleviate pain points and elevate lives?

Methodology:

YouGov Profiles

— Segmentation and media planning tool.

YouGov Profiles makes it simple to find and understand the audience that matters most to you.

With data collected daily, it gives you the power to build and customise a portrait of your consumers' entire world with unrivalled granularity.

More than 12,500 variables are available in South Africa.

Population:

Nationally representative sample of South African adults with access to the internet, aged 18+. YouGov Profiles dataset: 2021-03-07, 2022-03-06, 2023-03-05, 2024-03-03, 2025-03-02.

Population groups filtered by:

		2021	2022	2023	2024	2025
Nationally representative population		n~6237	n~5591	n~6042	n~6311	n~4102
Lower Income	Household income of less than R8,000 per month	n~421	n~819	n~732	n~802	n~426
Working	Household income of R8,000 – R39,999 per month	n~1327	n~1899	n~2136	n~2904	n~1951
Affluent	Household income of more than R40,000 per month	n~619	n~966	n~1008	n~1639	n~1162

Up&Up

The Up&Up Group (formerly M&C Saatchi Group South Africa) is one of the African continent's leading independent creative groups of companies and is 100% South African owned. The group is guided by its founding principles of optimism, openness, opportunity, and a belief in creativity's ability to elevate everything up and up. Up&Up comprises more than 500 diverse, creative minds across six creative companies which include:

- M&C Saatchi Abel (through-the-line advertising)
- Black & White (loyalty & CRM marketing),
- Connect (full-service media company)
- Razor (public relations)
- 2Stories (content marketing)
- Levergy (sponsorship and passion marketing)
- Dalmatian (boutique TTL agency)

The Up&Up Group delivers marketing and communication solutions for some of the most loved, valuable and sought-after brands in South Africa, and across Africa. The Up&Up Group is the Africa Continent affiliate of the globally independent M&C Saatchi Group PLC.

www.theupandupgroup.com

KLA

KLA, a leading South African insights consultancy, delivers data-driven solutions to help brands navigate complex markets.

With expertise in consumer research, brand tracking, and market segmentation, KLA provides actionable intelligence to drive strategic decision-making. KLA, the exclusive partner for YouGov in the sub-Saharan region, offers real-time brand monitoring and audience insights, ensuring businesses stay ahead of the curve.

As a 100% female-owned, B-BBEE Level 2 company, KLA is committed to innovation, diversity, and excellence.

www.kla.co.za.

YouGov

YouGov is an international research data and analytics group, delivering real-time insights into consumer behavior, brand perception, and public opinion. YouGov's data-led offering provides businesses, media, and policymakers with data-driven intelligence to make informed decisions. YouGov's research tools, including YouGov Profiles and YouGov BrandIndex, offer unparalleled access to audience sentiment and trends via their on-stream, reliable data tools, working with the world's most recognised brands.

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