

KANTAR

Not Ready? Set, Go!

Africa recovery Playbook... or first
steps towards recovery



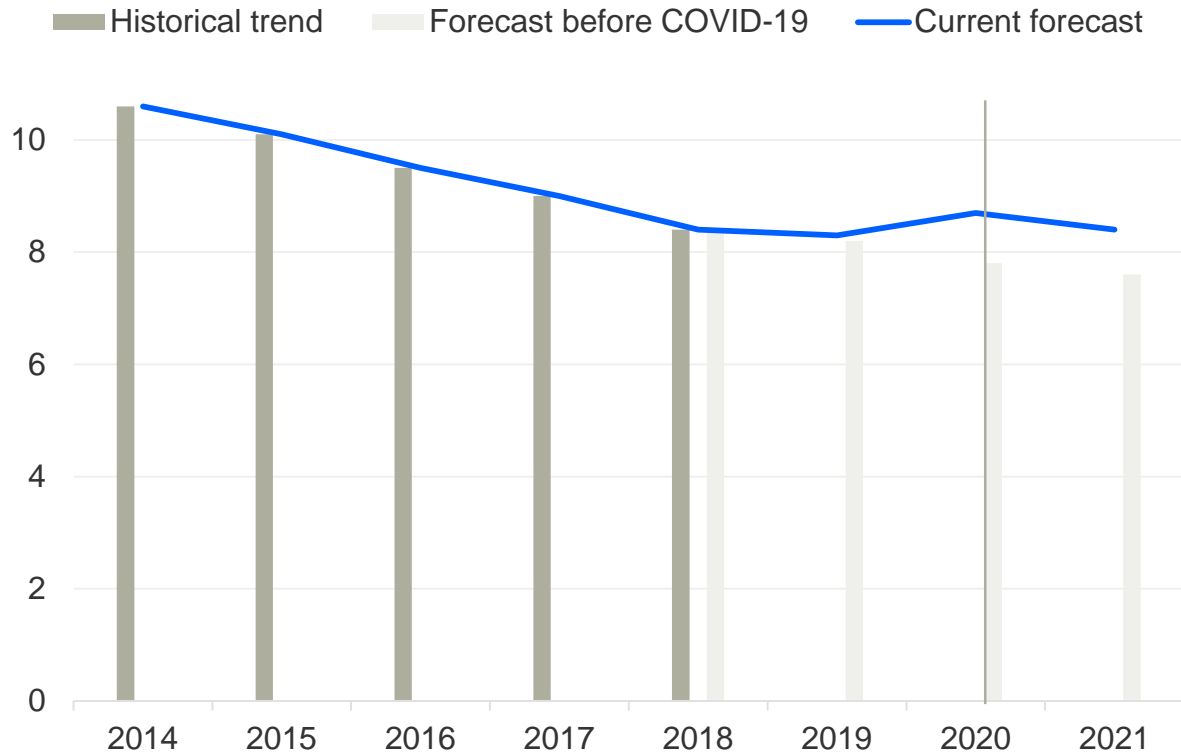
1 The damage is real.
Recovery is urgent.



Covid-19 will push 5 million more Nigerians into extreme poverty in 2020

The road to recovery will be no straight path

The impact of COVID-19 on Global Poverty



Nigeria in focus

90%
Crude Oil:
Foreign Currency
Earnings

70%
Crude Oil:
Government Income

-52%
Oil Price
(Current – \$25.57 vs
Budget Benchmark –
\$53)

200M+
National Population

-3.4%
GDP 2020 Prediction
(+2.2% in 2019)

85%
GDP Household
Consumption

48.5%
MSMEs
GDP

48.5%
Live in Extreme
Poverty (<\$1.90/day)

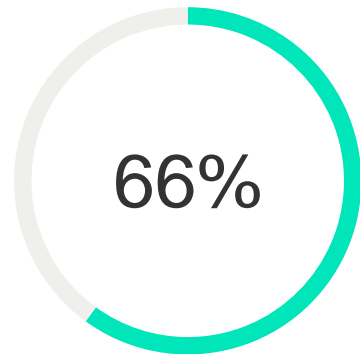
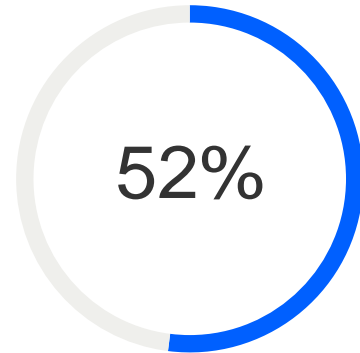
96%
MSMEs vs Private
Sector

99.8%
Micro enterprises In
MSMEs

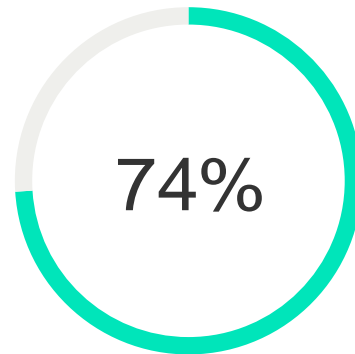
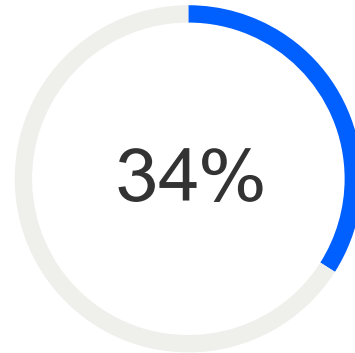
84%
MSMEs
Employment

Nigerians concerns echo the daunting financial realities, as a result of confinement conditions

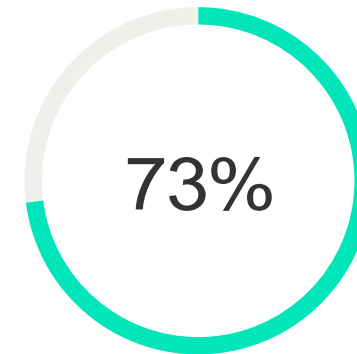
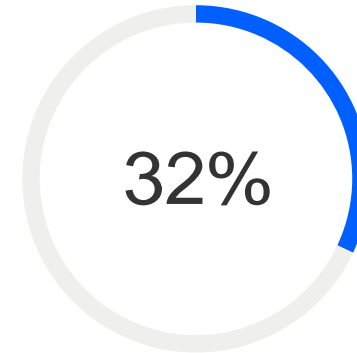
16-20 March 2020
58 confirmed cases



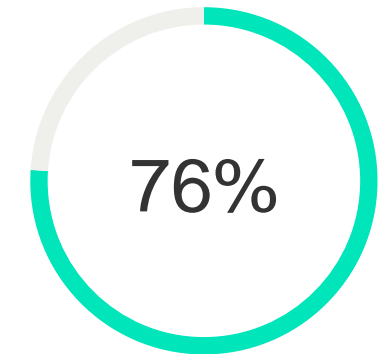
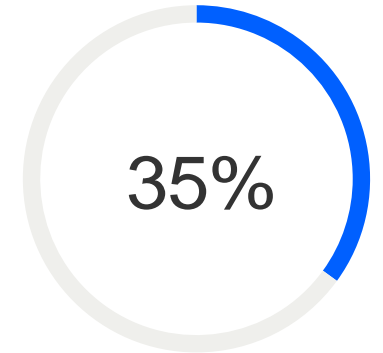
1-6 April 2020
238 confirmed cases





10 - 15 April 2020
407 confirmed cases



24 April – 01 May 2020
2,170 confirmed cases

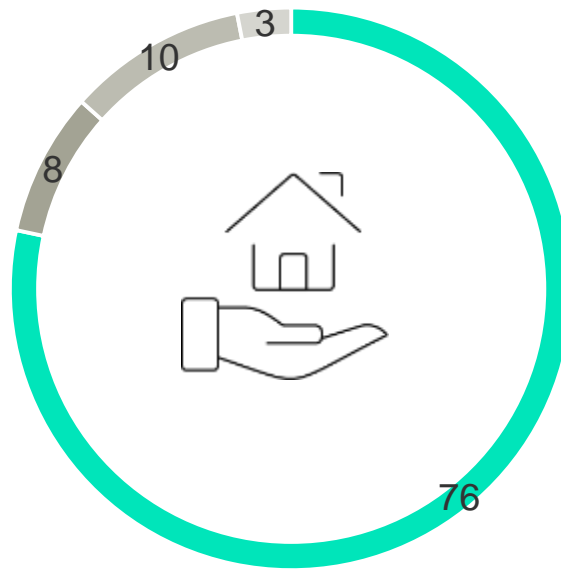


 Concerned about falling sick
 Concerned about their financial situation

Household incomes have been already largely impacted

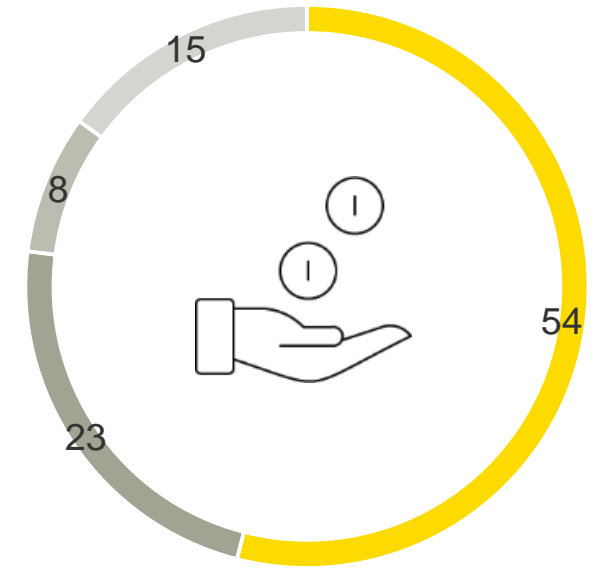
Impact on Household Income In %

- Coronavirus has already impacted my household income
- Coronavirus has not yet impacted my household income but I expect it to in the future
- Coronavirus will have no impact on my household income
- Don't know/ NA



Impact on Personal Income In %

- Coronavirus has already impacted my personal income
- Coronavirus has not yet impacted my personal income, but I expect it to in the future
- Coronavirus will have no impact on my personal income
- Don't know



Q: Thinking about your household income, that is the income of everyone in your household, which one of these statements comes closest to your current situation?



2

Life as we know has
changed

Key Consumer shifts

Shoppers adjust their shopping sessions

Stock up recorded across many FMCG categories

- Food
- Beverages
- Personal care
- Household care

Panic buying more prominent in Ghana than in Nigeria





Retail

is set to be disrupted for the long run

70%

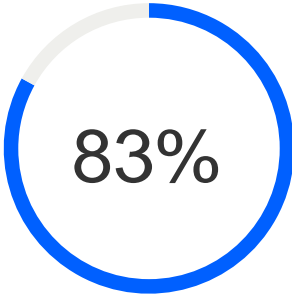
Have reduced their shopping trips to a physical store

20%

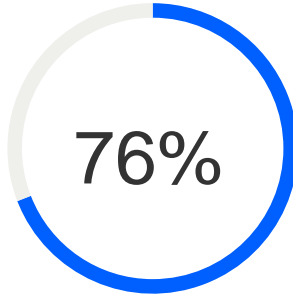
Have started shopping more online versus

A surge in media consumption overall.

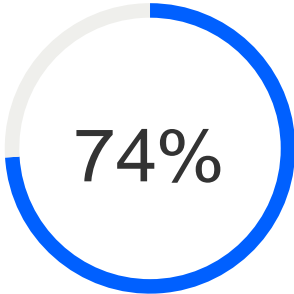
TV remains central.



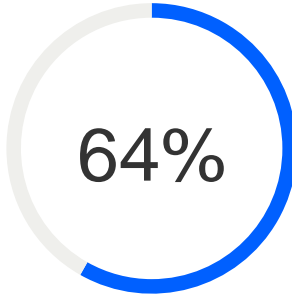
Social Media



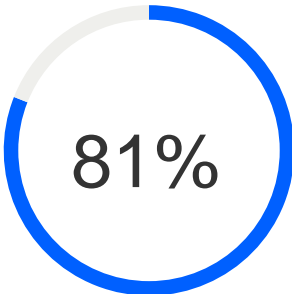
Instant messaging



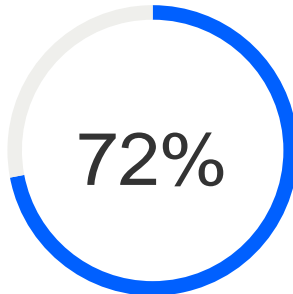
Online videos



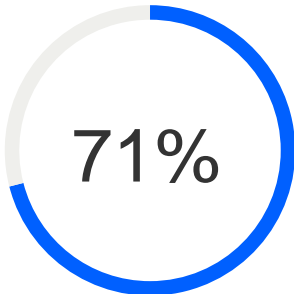
Television



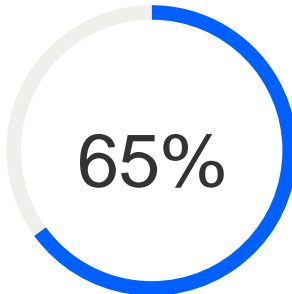
WhatsApp



Facebook

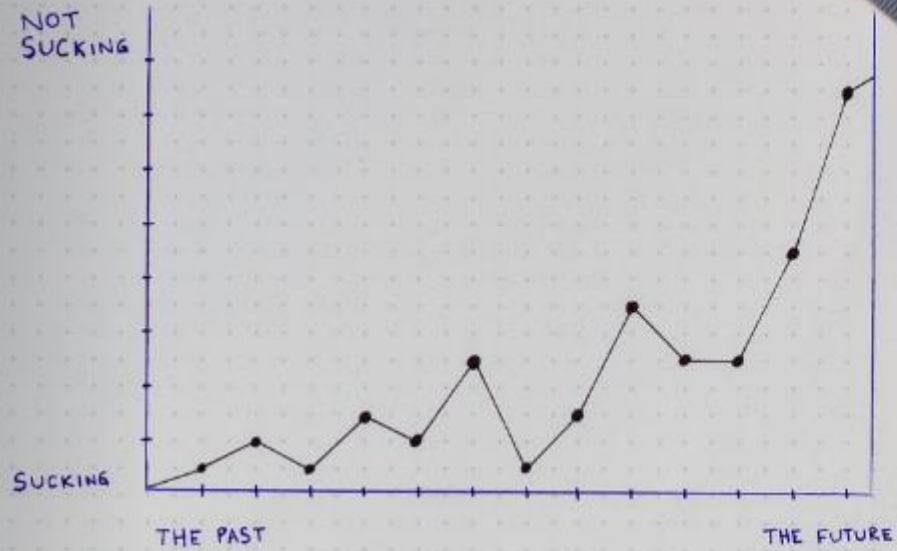


YouTube

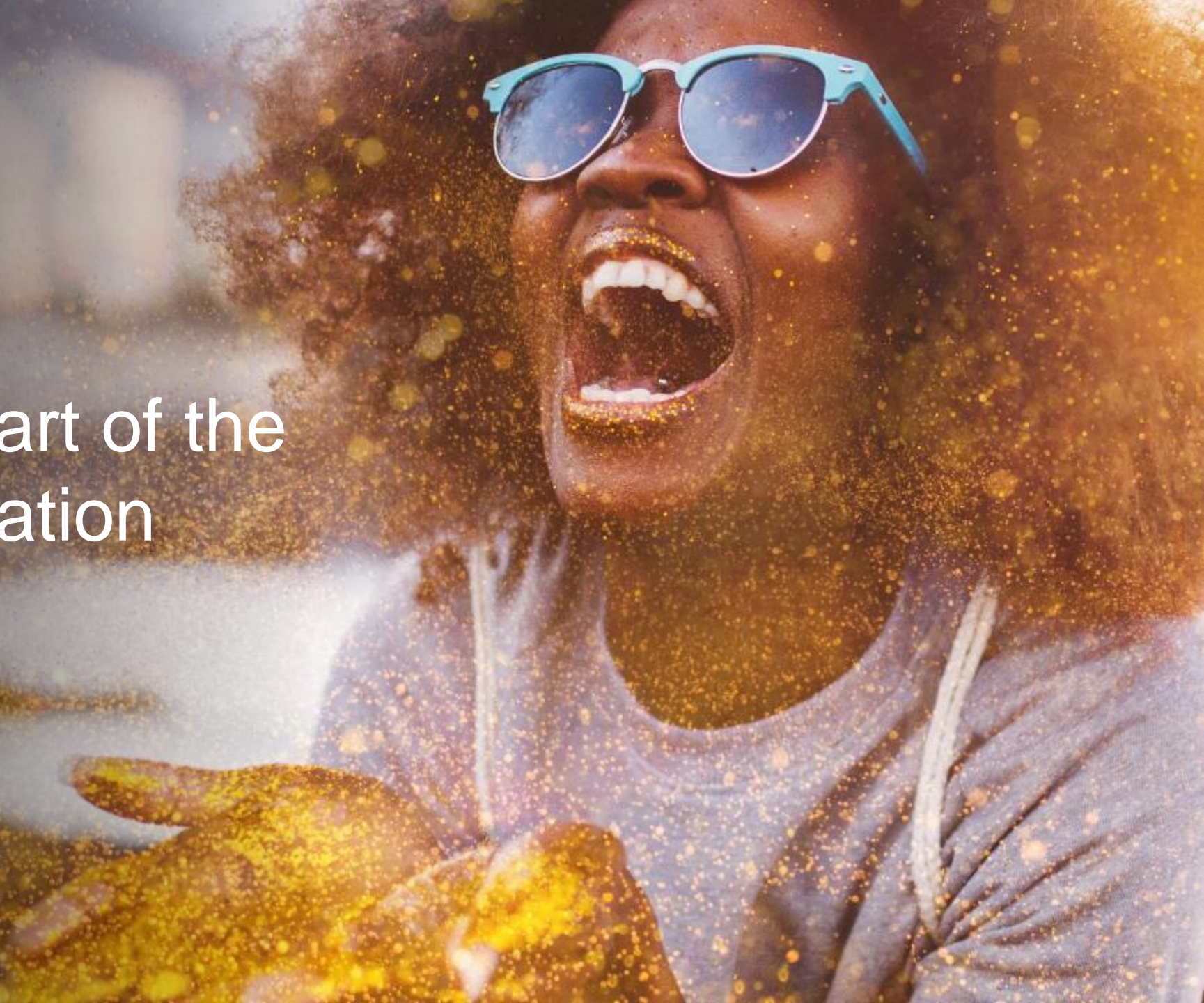


Instagram

3 Charting the way to recovery



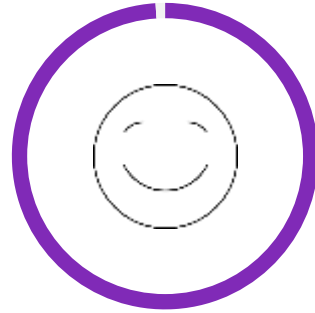
Values are part of the
success equation



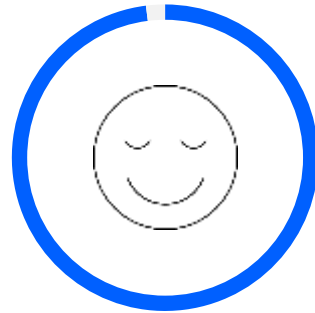
Resilience, like nowhere else

Nijia no dey carry last

A resilient people – always
standing up to survive and
stand out



99%
I believe in myself
and my skills



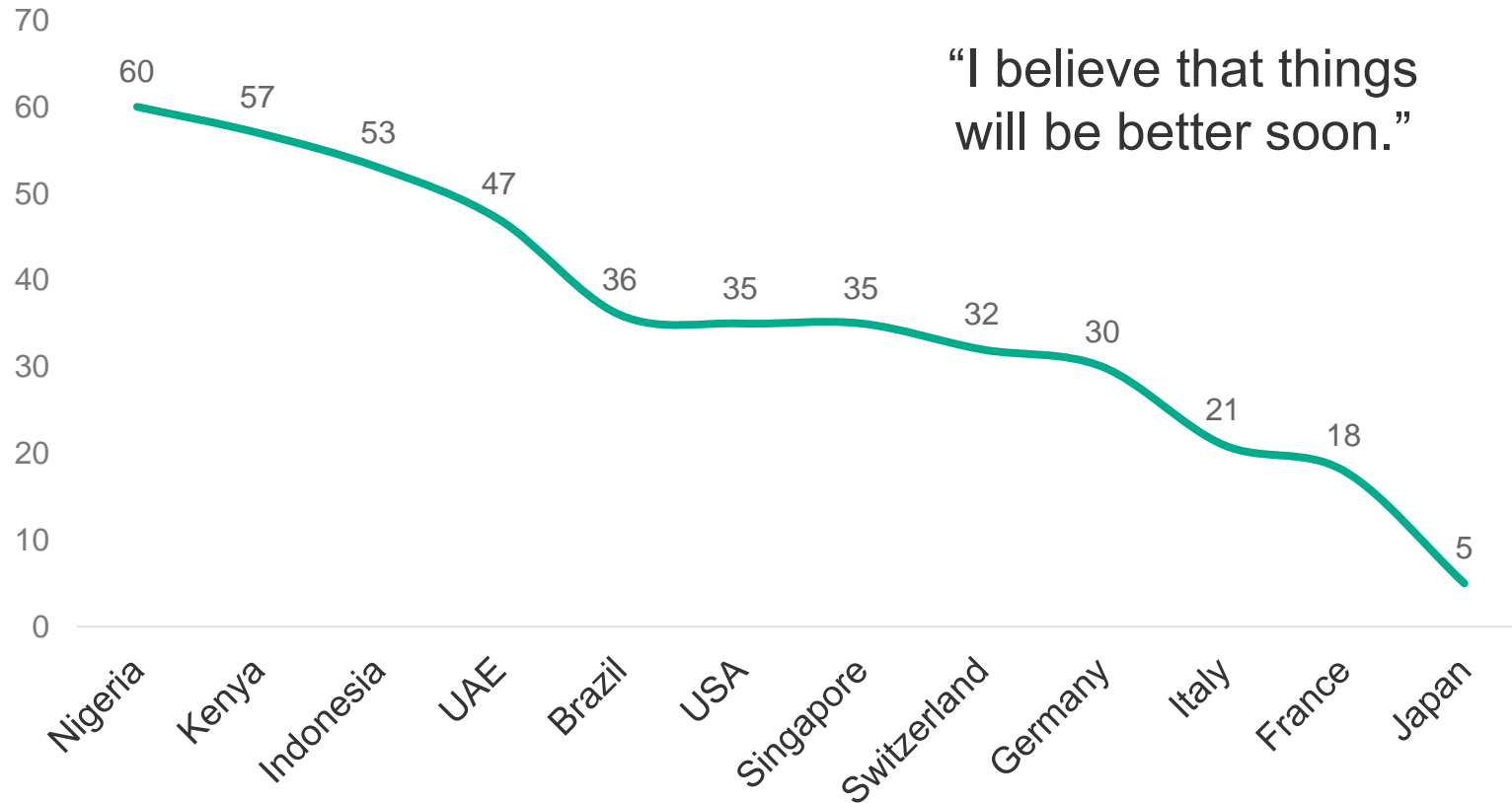
98%
I am quite happy
about my life



97%
I feel happy



The most positive attitude towards the future



“I believe that things will be better soon.”

This isn't forever.
It's just right now.

... and pragmatism
closes the deal!



Consumers are looking for comfort and reassurance

Practical is the new winning currency

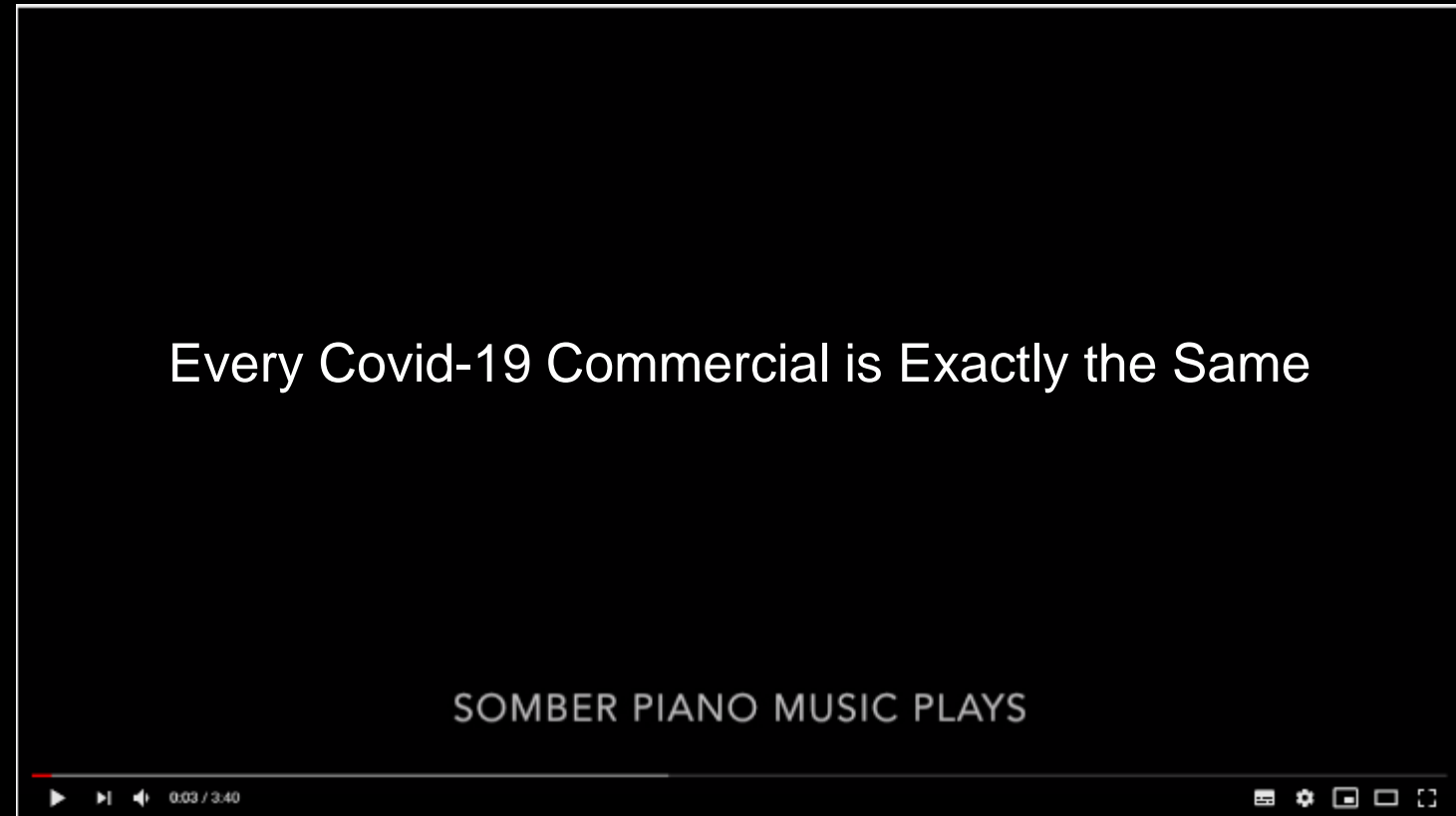
For consumers

#1

Most important

Being prepared and well informed is fundamental

It's time for [more than just emotional support](#)



Corporate Covid-19 response videos are eerily similar. *Cue somber piano music*
1,543,285 views | 15 Apr 2020

Winning

requires successful activations of these newly accelerated trends

1.

Immunity
Premium

- Product composition and origin
- Reformulations, renovations, innovations to include super ingredients

2.

Safely
produce

- Supply chain at the foreground
- Practical and credible and safety production measures
- Longer shelf life

3.

Bargain
Hunting

- Threat of Low cost players
- Innovative marketing activations
- Line extensions and portfolio optimizations /

4.

In
Homing

- In home delivery
- E-commerce strategies.
- Online entertainment

5.

Inner
Healing

- Connect to heal
- Humor
- Resources for self-development
- Mission-led marketing

What Nigerians truly expect from brands

Be Bold

25%

Attack the crisis and demonstrate that it can be fought

Be Practical

21%

Be practical and realistic and help consumers in their everyday life

Be The Change

19%

Be an example and guide the Change



KANTAR

//

Stopping advertising to save money is like stopping your watch to save time.

//

Henry Ford

