

# PwC's Voice of the Consumer Survey 2024

Shrinking the consumer trust deficit  
South African findings

July 2024



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# Introduction



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The South African retail industry continues to face a very difficult operating environment which includes dealing with the cost and disruption of load-shedding, a struggling consumer given the weak economy, elevated inflation and high interest rates. In this environment, our retailers need to continue to look for innovative ways to drive growth through diversification and market share gains, ensure costs are managed competitively, and continue providing a consistently great experience for their customers across both physical and digital interactions. This comes with associated challenges of the need to digitise internally, manage profitable on demand delivery channels, a changing omnichannel strategy to meet consumers’ evolving expectations, and ensuring that the service at in-store shopping is exceptional.

We’re pleased to present the South African findings of our global Voice of the Consumer 2024, tailored to the unique domestic consumer market to help retailers traverse this challenging landscape. Our survey amongst 1,009 South Africans reflect the views of the young and employed consumer class.





# Companies can strengthen the confidence consumers have in them by executing on six key imperatives

Trust is crucial for consumers and for the companies that sell products and services to them: as shoppers confront a set of overlapping and often mutually reinforcing disruptions—financial, ecological and technological—they are prioritising assurance and reliability from the brands they engage with.

That's a signal finding of our inaugural Voice of the Consumer Survey, which builds on insights amassed over 15 years of consumer research by collecting the perspectives of more than 20,000 consumers across 31 countries and territories on a wide range of issues, including finding value for money, caring for the environment, embracing AI, being open about data and attending to their health.

The good news for leaders of consumer-facing businesses: global consumer markets are set to continue expanding. The global consumer class, comprised of those spending US\$12 or more per day, reached four billion last year, and is projected to reach five billion people by 2031. The bad news: there's a widening gap between the trust that executives think consumers place in their companies and the trust that consumers actually have in them. In order to maintain and grow market share, companies must figure out how to build trust in several dimensions.

In interviews conducted alongside our quantitative survey, senior executives confirmed the importance of trust and reputation to their strategy and growth—and described a landscape of both challenges and enormous opportunities. 'In an era of wide distrust, business is still one of the more trusted institutions,' says Esi Eggleston Bracey, Unilever's Chief Growth and Marketing Officer. 'People trust brands they love and

companies that use their data responsibly. Employees trust companies that support them, have responsible practices and treat them as people. And investors trust performance and solid, continuous returns.'

## Six consumer trust imperatives

- 1 Navigate conflicting priorities in an economy with rising prices, meeting customers' expectations of value while managing price increases effectively.
- 2 Strike a balance with social media use, recognising its significance as a platform for sales and engagement, while being mindful of consumer concerns about its credibility.
- 3 Forge bonds with eco-conscious consumers by connecting their intentions to positive environmental impacts.
- 4 Incorporate and experiment with AI tools in business operations while maintaining a human element, especially in more complex and personal services.
- 5 Safeguard personal data, while continuing to use it to offer personalised services and elevated customer experiences.
- 6 Create and promote a product portfolio that reflects consumers' desires for wellness, nutrition and more sustainable food production.

Inflation is the top concern shared consistently around the globe

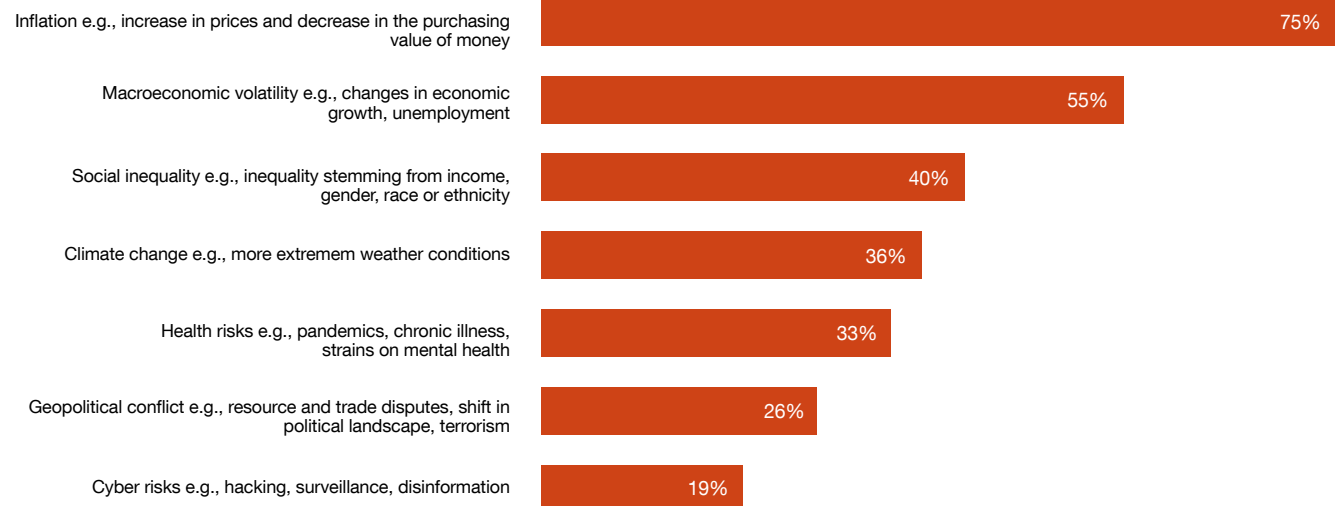
## Imperative one – Meet customers' expectations of value while managing price increases effectively

Inflation ranks overwhelmingly as the number-one risk that South African consumers think could impact their country over the next year; 75% put the issue within their top three concerns. That's 20 percentage points ahead of other major threats, including slow economic growth, climate change and health issues, and it was the top concern consistently around the globe—despite lower rates of inflation in some regions.

### Inflation still looms large in shoppers' minds

**Question: Which of the following risks or threats do you feel could impact your country in the next 12 months?**

**Percentage of respondents ranking each risk in their top three**



Base: 1,009 (all South African respondents)  
Source: PwC's Voice of the Consumer Survey 2024

After consumers largely accepted the price increases of the COVID-19 era, they have shown little tolerance for continued rises, especially as they turn their attention to mounting non-discretionary spending: 77% expect the most significant increase in spending in the next six months to be on groceries.



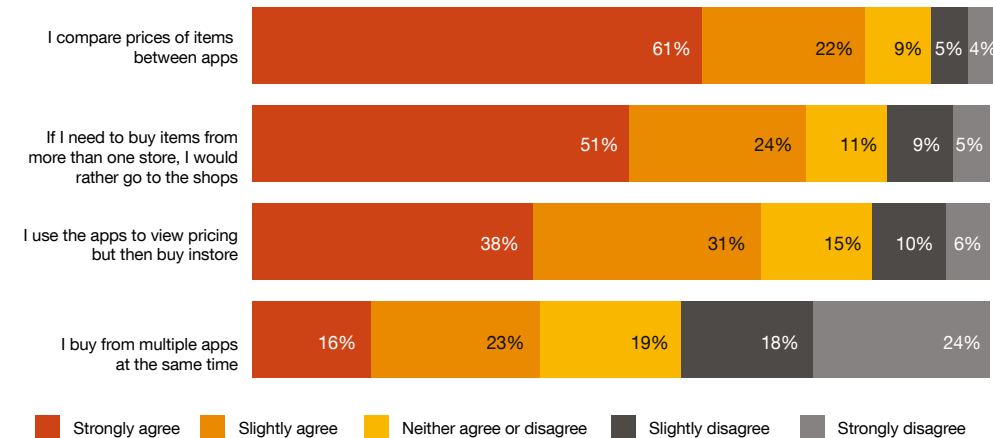
Cost-effective pricing is emerging as an important and complex factor in gaining consumer trust. Governments and regulators, acting out of a sense of duty to consumers, have already started taking action against price increases that they see as outside reasonable bounds. And consumers are searching for better value for their money: 44% would consider switching from their preferred name brands to more affordable options, such as discount brands and generic products and only 7% of consumers would buy a luxury item with their leftover income after paying for bills and essentials.

## Focus on the purchase journey

Brands and retailers must embrace a more flexible omnichannel strategy to meet consumers' evolving expectations for a dynamic mix of online and offline experiences. Marketers should also take note that the distribution of consumers' preferred shopping locations—either in-store or via remote channels—has remained consistent post-pandemic. Seven in 10 people use shopping apps to compare prices to items but then continue to buy instore.

### Consumers continue to seek out the physical shopping experience

**Question: To what extent do you agree or disagree with the following statements about buying groceries on apps?**



Base: 1,009 (all South African respondents)  
Source: PwC's Voice of the Consumer Survey 2024

According to [PwC South Africa's Retail Sentiment Index](#) 2023, not all retailers are offering alternatives to the physical store yet, due to the freedom-of-choice conveniences that accompany going into a physical store. In the absence of affordability and accessibility of certain virtual store arrangements in Africa, the physical store provides a sensory experience that other platforms have not yet been able to get completely right. Physical stores have varying purposes that provide competitive advantage and a unique customer experience.

Indeed, many executives stressed the importance of empowering their sales staff through access to more personalised consumer data and offering consumers more meaningful in-store services and experiences.

In line with [PwC's Brick, click and the future](#) publication, retailers should understand the need to differentiate themselves and reinvent their ways of interacting with customers. This is where a dynamic shift is needed. Today retailers must provide customers with more than just goods to promote a positive and memorable experience: an experience in phygital (physical and digital) world that seamlessly blends digital and physical shopping. For this to be executed successfully, retailers need to rethink their organisational strategy, operating model and capabilities to match evolving customer needs and exceed their expectations.

Modest technological empowerment is also key to building consumer trust and satisfaction in the in-store experience. Some 43% of consumers indicated that the availability of mobile or contactless payment solutions would encourage them to shop in-store. Additionally, more than one-third of consumers expressed interest in smart tags that provide product details on smartphones, as well as self-checkout systems.

## Value-based reinvention pathways

- Secure profitability (as prices normalise in the second half of 2024) by investing in consumer demand, restoring volume through marketing and advertising, and continuing cost-saving initiatives.
- Attract customers back into stores through targeted investments in talented staff and technology to improve the shopping experience.
- As technology continues to evolve, shoppers are increasingly drawn to digital features that can enhance their in-store shopping. This indicates a desire for a more holistic shopping experience that leverages the best of both digital and physical (phygital) worlds. To prepare for this shift, it's essential to address several key workforce touchpoints such as acquiring new skills, addressing reskilling needs, and adapting managerial and leadership skills.
- Consider mergers and acquisitions as part of a disciplined capital allocation. Lagging brands may be ripe for pruning.

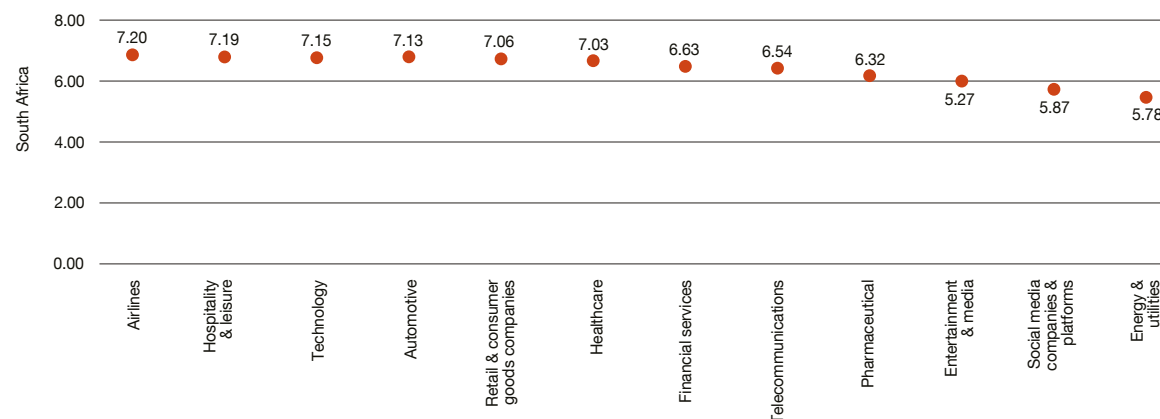
41% of consumers report directly buying products through social media

## Imperative two – Strike a balance between engagement with social media and caution over its credibility concerns


Consumers have mixed feelings about social media. They increasingly use it as a place for purchases; 41% of consumers report directly buying products through social media. And they really like it as a place for discovery and reviews: 83% of South African consumers use social media channels to discover new brands, and 82% of consumers seek reviews to validate a company before making a purchase, which is well above a global average of 67% and 70% respectively. Interestingly, Gen Z are more likely to discover new brands via social media. But at the same time, consumers are questioning its safety and reliability, ranking social media as their second-least trusted industry with energy & utilities being the least trusted locally.

### Shoppers have trust concerns with the social media industry

**Question: On a scale of 0 to 10, to what extent do you think companies in each of the following industries are generally trustworthy?**



Note: 0 = not trusted, 10 = highly trusted.  
Base: 1,009 (all South African respondents)  
Source: PwC's Voice of the Consumer Survey 2024



Striking the right balance on social media is crucial for companies. Brands need to create engaging and authentic content that resonates with their target audience, while also being mindful of the concerns that consumers have on trust. Data protection was the leading factor that influenced consumer trust—92% of respondents consider it a top priority. Other important factors are the ability to communicate clearly (92%), the quality of goods and services (90%), companies' treatment of employees (89%), and product affordability (83%).

Businesses are engaged in a delicate dance of expressing their purpose and values while also navigating the need for caution in their communications with consumers. 'Companies today are trusted more than governments and media. That gives companies an opportunity to play a larger and purposeful role in society,' says Ronald den Elzen, Chief Digital and Technology Officer at Heineken. 'At the same time, we see many companies becoming more careful and restrictive in advertising, based on the polarisation we are seeing around the world.'

## Advertising's new frontier

Through personalised approaches, user-generated content initiatives, gamification and more, companies are competing in the digital space to create relationships that go beyond mere brand awareness. The impact of personalised social media advertisements is evident: seven in ten consumers reporting that it would influence their purchasing decisions, followed by the influence of retailer websites (75%), email (60%) and text messaging (34%).

Global social media ad spending alone is projected to reach US\$220 billion this year, up from the US\$207 billion estimated for 2023. This includes a strong focus on social media influencers, both widely recognisable celebrities and aspiring individuals, who are now an established channel—our survey found they have influenced 44% of South African consumers to make a purchase, which is very consistent with the global average of 41%.

## Social media reinvention pathways

- Emulate front-running consumer packaged goods (CPG) companies by building social ecosystems targeted to specific generations (Gen Z, millennials, etc.) across various social media platforms (YouTube, Instagram, Snapchat, Twitch, etc.).
- Invest in marketing and advertising to build brands instead of pursuing more transactional trade promotion spend.
- Take a digital-first approach to investing in advertising channels such as text and email, in addition to social media.
- Invest in and leverage advances in technology, such as Generative AI, to increase the level of personalisation at scale.
- Devise methods to demonstrate to customers the ways in which their data is being used for their benefit.





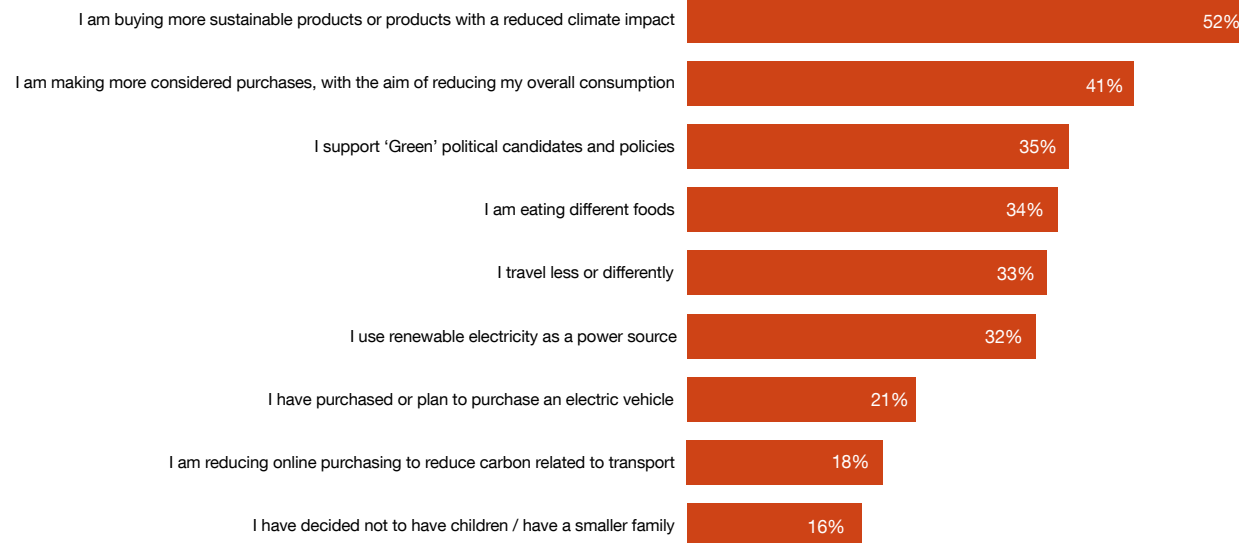
9 in 10 consumers report experiencing firsthand the disruptive effects of climate change in their daily lives

## Imperative three – Forge greater bonds with eco-conscious consumers

A staggering 93% of survey respondents report experiencing firsthand the disruptive effects of climate change in their daily lives, which is higher than the global average of 85%. A smaller but still considerable number (52%) also say that they are buying more sustainable products as a way to reduce their personal impact on the environment.

### The environment is an important factor in purchasing decisions

**Question: What actions or behaviours, if any, have you taken to reduce your impact on climate change?**



Note: 'More sustainable products' include products with recycled materials, natural products, secondhand products and fewer plastics. Examples of 'eating different foods' include eating less meat and eating more plant-based food. Examples of travelling 'less or differently' include selecting a lower carbon footprint option, such as a train instead of a flight.

Base: 1,009 (all South African respondents)

Source: PwC's Voice of the Consumer Survey 2024



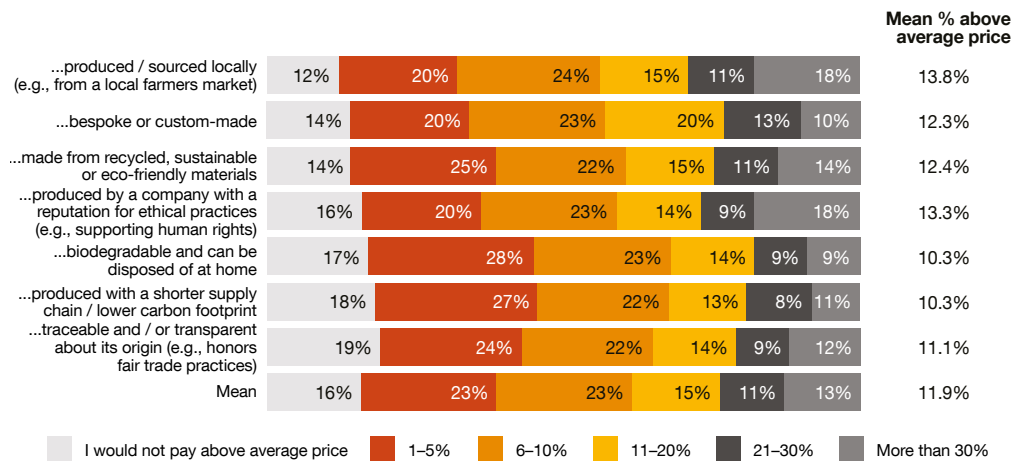
This gap presents a chance for consumer-market companies to better connect with environmentally aware consumers. It also calls for a deeper understanding of consumer behaviour, including the 41% of all locally surveyed consumers who report making more considered purchases to reduce their overall consumption.

South African consumers are telling us they would be willing to pay on average 11.9% above the mean product price for sustainably produced or sourced goods, slightly above last year's [pulse survey](#) result of 10%. Interestingly, the local result is 2.2% higher than the global average of 9.7%.

They say the sustainability incentives that would have the greatest impact on their purchasing are mainly tangible attributes, including eco-friendly packaging (41%), production methods that emphasise waste reduction and recycling (37%), and making a positive impact on nature and water conservation (37%). Supply chain transparency or community engagement (20% and 17%, respectively) is seen as less influential. Providing consumers with information related to these attributes that will enable them to make informed decisions, will become more important in future.

Consumers care about sustainability—and are willing to pay more for it

Question: How much above average price would you be willing to pay for a product that is...



Note: Sums may not total 100 due to rounding.  
Base: 1,009 (all respondents)  
Source: PwC's Voice of the Consumer Survey 2024

In interviews, executives from a wide range of global consumer markets companies—representing grocery, health, home decor and more—shared similar experiences of their customers' eco-minded behaviour. The expectation that companies will do the right thing for the environment is now seen as table stakes. Thus, companies must achieve a delicate balance between consumer affordability and environmental impact. This may involve switching from high-performance plastic packaging to biodegradable options, or giving customers a choice of using more costly [sustainable aviation fuels](#) for product delivery.

Cost increases associated with sustainability are a fundamental challenge for consumer-facing companies. Thinking about opportunities from sustainability—how to stay ahead of the competition and how to become increasingly efficient—should be key to sustainability discussions though. The [2024 Africa Business Agenda: South African Perspective](#) showed that over three quarters of companies have efforts in progress to improve energy efficiency and over half are creating innovative climate-friendly products or services.

### Sustainability focused reinvention pathways

- Expand the impact of compliance and regulatory work, like the [Corporate Sustainability Reporting Directive \(CSRD\)](#), by reporting non-financial, sustainability related information to find bottom-line benefits but also to report on negative impacts.
- Publish key performance indicators (KPIs) and be clear around the progress made toward achieving targets.
- Provide a complete view of company impacts, both positive and negative, not driven by regulatory requirements but by purpose.
- Build more resilient, more efficient and less energy-intensive supply chains through network optimisation, integrated visibility and technological innovation.
- Discover efficiencies in operations such as truck loading, warehouse operations, routing, and waste and inventory reduction through machine learning, AI, and analytics.
- Embrace the opportunity for premiumisation through product differentiation valued by consumers (e.g., products that commit to doing no harm).

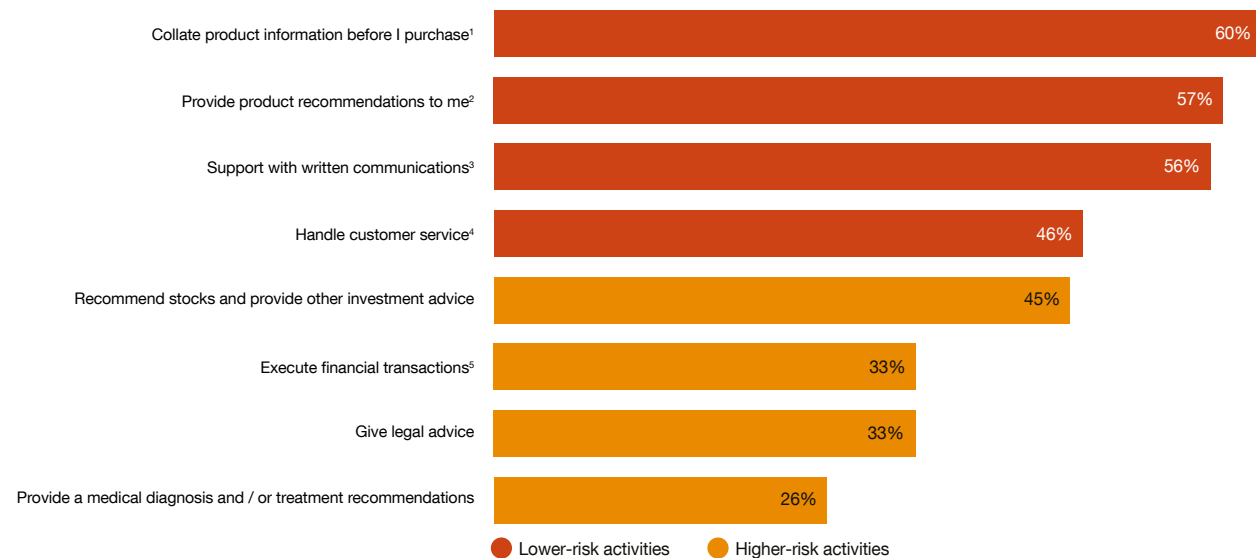
Consumers seem to trust AI more for simpler tasks

## Imperative four – Incorporate AI while maintaining the human element

Companies face the challenge of responsibly aligning consumer sentiment towards emerging technology, like generative AI (GenAI), with the technology's current and potential capabilities. A substantial 80% of consumers express concerns about GenAI's future developments. Whilst customer sentiment towards GenAI is growing, many companies are investigating the opportunity to leverage GenAI tools internally to support customer processes. Although more than half of consumers trust GenAI for simpler tasks, such as aggregating product information or providing recommendations, consumers are less confident about its usage in higher-risk, more personal services such as healthcare. This means that companies must tread carefully in integrating technology that can reduce operating costs, addressing consumer concerns and maintaining ethical standards.


### Product research ranks high among consumers' potential AI uses

Question: Which activities would you trust AI to do accurately in place of human interaction?



Base: 1,009 (all South African respondents)  
Source: PwC's Voice of the Consumer Survey 2024





Unilever's Eggleston Bracey, for example, notes that acceptance of AI among employees and consumers has grown significantly in the past 18 months. 'I'm amazed at the receptivity towards AI from January 2023 to today,' she told us. 'Internally, we like to think of AI as an opportunity for augmented intelligence, the blend of artificial and human intelligence. Our responsible AI strategies dictate we always have a person in the loop.' To support the use of AI tools, we are seeing these tools becoming more relevant in data exploration for many use cases including customer sentiment analysis.

'We're also seeing more adoption as large language models have made AI so accessible, making it a lot less scary for people. People are identifying with it now because it's making life easier.' The large-scale adoption of AI tools being embedded into productivity suites like Copilot in Microsoft 365 is growing in internal use cases to support Customer processes.

Take the percentage of consumers who trust AI to provide product recommendations: 57%. This number will continue to climb as familiarity with ChatGPT and other AI applications increases, and if consumers turn away from incumbent search engines and towards AI platforms.

## Early-stage adoption

Today, adoption of machine learning and GenAI applications, such as LLMs (large language models) and text-to-image tools, varies among brands. Companies have used these tools for internal improvements such as supply chain optimisation, company information management and pricing strategies. Some brands have progressed further—and done so quickly—experimenting with consumer engagement and marketing personalisation through design-led tools in controlled environments or 'sandbox' settings.

Despite high interest among respondents in the use of chatbots for providing detailed responses (51%) and to solve complex problems (49%), over half (54%) of consumers demand direct connection with a sales representative if the chatbot is unable to answer the consumer's query effectively. This, again, highlights the crucial balance that companies need to strike between technological innovation and the human touch.

According to *PwC South Africa's Retail Sentiment Index*, to balance investments in human interaction with offering an engaging digital experience, retailers need to reimagine and redesign their service operating model to empower frontline staff with the right skills, visibility and access to integrated technology to efficiently and effectively resolve customer queries across multiple channels. In addition, AI provides an ideal opportunity for retailers to collect and utilise data to personalise the customer experience. With this comes the need for jobs that specialise in nuanced people analytics and consumer behaviour. This involves innovation in loyalty programmes that go beyond current trends of customer discounts: the future of loyalty is experience based.

## AI reinvention pathways

- Develop a *responsible strategy* for the regulatory landscape that will emerge around AI in the next few years.
- Scale successful machine learning, AI and digital use cases to optimise sales and demand planning.
- Explore the potential of AI tools to increase supply chain efficiency, from new product development to waste and inventory reduction.
- Test and learn with the producing capabilities of LLMs on ad campaign development and production.



89% of consumers demand assurances that personal information won't be shared

## Imperative five – Safeguard personal data, while using it to elevate customer experiences

A large majority of South African consumers (92%) say that protection of their personal data is one of the most crucial factors in companies' ability to earn their trust, which is 9% higher than the global average of 83%. When asked specifically about privacy, a significant majority of consumers (89%) also demand assurances that their personal information won't be shared. But only around half feel confident that they understand how their data is stored and shared, and 82% express concerns about the security of their personal data on social media.

### Strengthening data protection could also strengthen trust

Question: How important are each of the following areas to building your trust in a company?



Note: Percentages shown are the sum of 'extremely important' and 'very important' responses.

Base: 20,662 (all respondents)

Source: PwC's Voice of the Consumer Survey 2024

The acquisition and use of first-person data for personalisation has also become crucial to maintaining a competitive advantage in the marketplace. With competition for valuable data intensifying, and new regulations coming into force in the [EU](#) and several [Asia-Pacific countries](#), it's imperative for companies to implement robust data protection measures and enact a strategy that engages with consumers without compromising the ethical use of data.



## Use it, don't abuse it

Industry executives describe a developing social contract that involves consumers willingly sharing their personal information in exchange for valuable incentives such as promotions, exclusives and other perks. Indeed, nearly 56% of consumers say they are happy for their data to be used to offer them personalised services and experiences. This trend is especially evident in loyalty programmes, which are becoming the primary engine of customer data for many companies.

## Customer experience reinvention pathways

- Responsibly scale your data strategy to realise the full benefits for the company and your consumers, given that many CPG companies have already made their foundational investments in data, tech and artificial intelligence (AI) use cases.
- Build AI-enabled digital tools for testing early-stage ideas and for digital prototyping in order to create efficiencies, such as the shortening of innovation cycles.
- Elevate your 'power brands' by using insights from consumer data to narrow or expand the focus of your brand portfolio.
- Ensure cross-channel consistency through omnichannel technology capabilities.



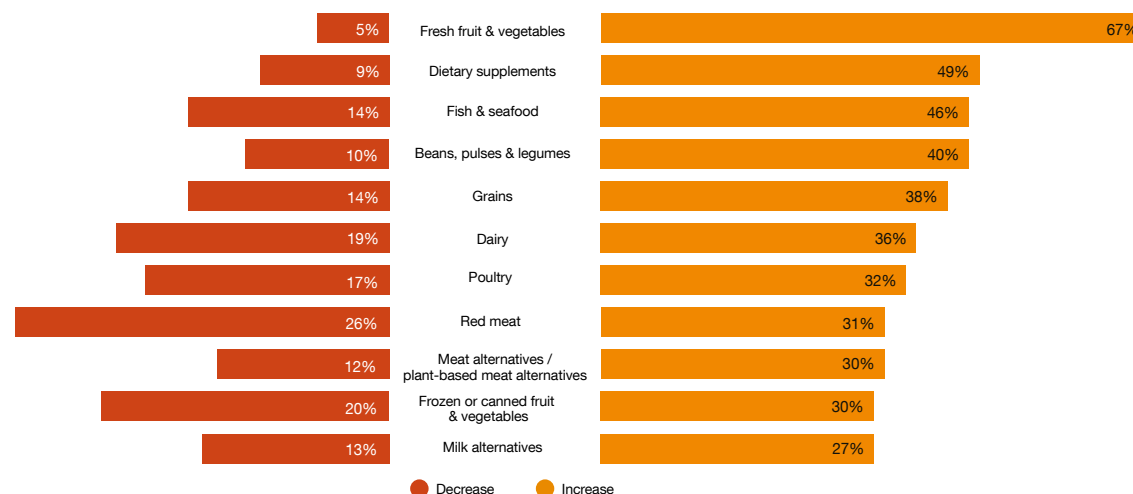
Looking at the next 6 months, there is evidence of a growing movement of health conscious consumers who are aiming to embrace a diet rich in fruits and vegetables, with an increased intake of additional dietary supplements, fish and plant based foods

## Imperative six – Create a product portfolio that reflects wellness, nutrition and sustainable food production

Two-thirds of consumers (67%) express intentions to boost their intake of fresh fruits and vegetables over the next six months, while a smaller but important group (26%) plan to reduce their red meat consumption. Despite these health-orientated preferences, only 14% of consumers consider the environmental implications of their food choices. This disconnect presents a significant opportunity for food producers, retailers and wholesalers to bridge the gap between consumer intent and sustainable practice.

### Fruit and vegetable consumption takes root

**Question: How do you expect your consumption of the following food groups to change, if at all, in the next six months?**



Note: 'I do not consume this food group' responses are not shown in the above chart.

Base: 1,009 (all South African respondents)

Source: PwC's Voice of the Consumer Survey 2024

The growing interest in plant-based diets hints at a rising awareness of the environmental burdens posed by traditional meat production, particularly beef, which is a known contributor to greenhouse gas emissions. Explicitly addressing these consumer concerns may help companies integrate plant-based options into mainstream shopping habits, while being mindful that the main motivations behind these shifts are consumers' considerations of general health (66%) and product cost (58%) when they make food and dietary choices.



## Feeding the globe

The ambition to adopt healthier and more sustainable diets cannot rest on consumers alone; producers and retailers must also step up. Global population numbers are expected to surge from 8.1 billion today to 9.7 billion by 2050 and the dual challenge of feeding more mouths and reducing food production's ecological footprint is becoming increasingly urgent. Although the business model of selling in larger quantities is necessary and lucrative, it will require innovation to reduce potential risks to long-term environmental and social sustainability.

Closer to home, South Africa's population could grow by another four million people by 2030. To address its food security challenges, the country could explore three opportunities: implementing precision agriculture to enhance farm productivity, adopting smart manufacturing practices for more efficient resource use, and reducing food waste at the retail and consumer levels.

Food companies can leverage the willingness of consumers to pay a premium for sustainably produced goods as a competitive advantage. Effective strategies might also include comprehensive food packaging and presentation that not only guides consumers towards environmentally friendly choices but also builds trust through transparency in product design and the communication of clear sustainability information at point of sale. For example, six in ten consumers in our survey agree that an independent sustainability score on food products would be helpful and that incentives on the pricing of foods nearing expiry would drive likelihood to purchase these items.

### Wellness, nutrition and food-production reinvention pathways

- Support consumers' ability to eat a healthy diet through clear category signposting, packaging information, and other targeted communication and marketing efforts.
- Expand portfolio strategies to incorporate a greater number of alternative meat products and proteins.
- Cater to a growing demand for health and wellness products, such as weight-loss prescription drugs and other over-the-counter solutions.
- Innovate to meet a new generation of informed consumers who are focused on their health, offering products such as wearables that incorporate health-tracking features.

## Unlocking the trust premium

As global consumer markets continue to expand, companies must move beyond their own perceptions of customer trust and learn what their clients actually think. Senior executives recognise this, and though challenges exist, there are also significant opportunities for those companies that prioritise trust-building efforts rooted in brand building, responsible practices and solid performance. Trust is an increasingly valuable currency in consumer markets, so companies must commit to building and maintaining long-term integrity.





# About the Survey

In January and February 2024, PwC surveyed 20,662 consumers across 31 countries and territories: Australia; Brazil; Canada; China; Czechia (Czech Republic); Egypt; France; Germany; Hong Kong, SAR; Hungary; India; Indonesia; Ireland; Malaysia; Mexico; the Netherlands; the Philippines; Poland; Qatar; Romania; Saudi Arabia; Singapore; Slovakia; South Africa; South Korea; Spain; Thailand; United Arab Emirates; Ukraine; the United States; and Vietnam. The respondents were at least 18 years old and were asked about a range of topics relating to consumer trends, including shopping behaviours, emerging technology and social media.

This survey included 1,009 consumers in South Africa. 42% of the respondents were male and 57% were female. 72% were considered working and 28% not working at the time of being surveyed.

Interviews with industry executives took place in March and April 2024.

PwC Research, PwC’s global centre of excellence for market research and insight, conducted this survey.

Please note that the above reflect South African consumer statistics unless otherwise stipulated.

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