



# South African Consumer Shopping Sentiment Tracker

1 NOVEMBER 2020 – 30 APRIL 2021

**Deloitte.**

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# Sampling methodology and disclaimers

A total of 854 891 non-brand mentions were retrieved for the 1 November 2020 – 30 April 2021 period. Enterprise mentions are excluded from sentiment analyses to prevent bias. Twitter was used as the data source. Location limited to South African and unknown only.

To carry out sentiment analysis with a 95% confidence level and an overall  $\pm 0.4$  pp margin of error on Net Sentiment, a random sample of 122 423 mentions were processed through BrandsEye’s Crowd of human contributors for evaluation and verification.

For the sake of consistency, the retailers will be anonymised and referred to their respective letters throughout the report.

The focus of this study intended to solely analyse conversation around online facilities. However, in order to minimize the margin of error, all conversation, including physical facilities, was included in this analysis.

	Volume	Sentiment Sample	Sentiment MOE
Retailer A	196 559	27 122	0.8%
Retailer B	90 808	14 551	1.2%
Retailer C	131 146	15 048	1.2%
Retailer D	142 841	19 153	0.9%
Retailer E	127 053	10 061	1.1%
Retailer F	97 932	15 457	1.0%
Retailer G	32 577	7 930	1.2%
Retailer H	16 792	6 895	1.4%
Retailer I	19 183	6 206	1.1%
Total	854 891	122 423	0.4%

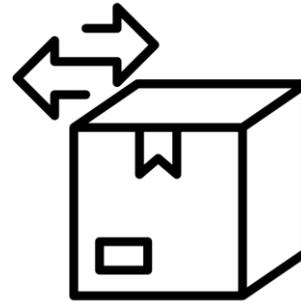
*The data contained in this report has been subject to quality assurance processes and deemed accurate on 23 June 2021.*

*There may be slight changes in statistics thereafter due to changes or updates on or from social media native platforms.*

# Introduction & Key insights

# Background to this report

- BrandsEye was commissioned by Deloitte to carry out an online media analysis of consumer sentiment towards retailers over the periods of November – April 2021.
- The aim of this report is to uncover what consumers felt regarding their shopping experiences, highlighting strategic opportunities for retailers over the various month-on-month sales periods.
- The report is segmented into four parts: An overview of the entire period: November 2020-April 2021, the festive season (November-December 2020), New Year and back-to-school (January-February 2021), and Easter (March-April 2021).



# Foreword

## GAINING INSIGHTS INTO CONSUMER ONLINE EXPERIENCE

In a tumultuous year for South African retailers, consumers took to online and omni-channel shopping during lockdown. Many of the previous assumed barriers consumers had, shifted and most categories experienced online growth and even after lockdown levels eased, consumers continued to shop online.

At the end of 2020, Deloitte Africa commissioned a South African consumer survey on online shopping and complemented these findings by applying a South African filter to the [Deloitte Global State of the Consumer Tracker](#) longitudinal survey to gain a better understanding of the factors influencing online shopper behaviour and to identify specific nuances among various consumer groups. The report allowed us to **identify seven factors that matter most to South African online shoppers**. You can read more about these as well as find the report [here](#). The survey allowed us to quantify certain influencing factors, but we needed to add qualitative insights into the consumers experiences and the key topics that drove satisfaction and sentiment.

Deloitte partnered with BrandsEye as we felt there is no better way to understand online shopping than to listen to the online conversations that consumers are willing to share about their retail experiences. Using a period of six months, starting with festive period when transactional volumes and conversations are high, gave a robust and valid sample to gain insights if consumer expectations were met.

Tracking conversations over a six month period allowed us to compare consumer sentiment associated with certain events as well as specific issues that remained consistent. This validated the insights from the research and the seven factors that do indeed influence and matter to online shoppers.

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# Key findings BrandsEye

## **Increased expectations around delivery demands and after-sales services negatively impacted customer experiences, especially over the festive season**

Operations hampered customer experiences over the festive period. Increased demand on services due to lockdown measures (especially on the reliance for deliveries and less time spent in-store) revealed that many retailers were not equipped to deal with the demand.

## **The handling and resolution of complaints on social media were critical**

Consumers criticised many of the retailers for not responding to their previously posted queries. It emerged that although some retailers were fairly responsive online, they were unable to close the feedback loop to fully and effectively resolve the issues raised. Due to high demands and increased expectations, especially over competitive sales periods, customer support teams need to be equipped with the tools necessary to resolve consumer concerns both timeously and effectively.

## **Operations around return, refunds, and exchanges hampered experiences with deliveries**

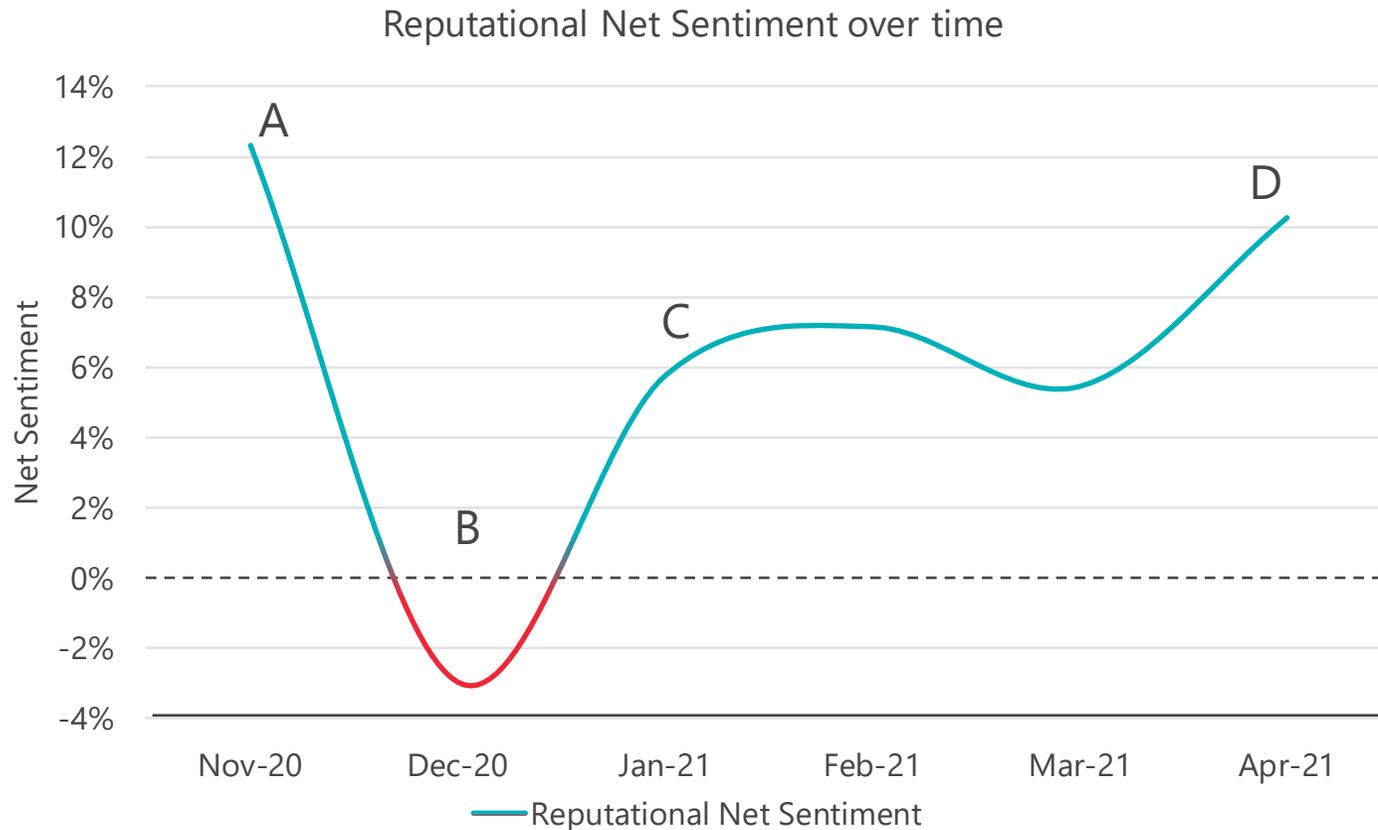
For many of the e-commerce retailers, high demand sale periods (such as the festive season Nov – Dec 2020) revealed high expectations for a seamless delivery process. The return, refunds, and exchange process emerged as problematic. Data also showed that consumers were frequently comparing specials and deals across the retailers. Retailers could lose customer loyalty if after-sales services, such as customer support is not reinforced over these periods.

## **Consumers were mistrustful of retailers they suspected of hiking prices over high demand sale cycles**

Consumers looked for the best deals over November but were highly critical and mistrusting of the promotions offered by grocery retailers over December. Previous allegations and convictions of price hiking from the National Competition Commission negatively impacted the reputation of many brands. Retailers need to work to rebuild trust with their consumers to counteract lost loyalty.

# Overview

# Yearly, promotional content driving specific retail events drive sales, consumer conversations and sentiment

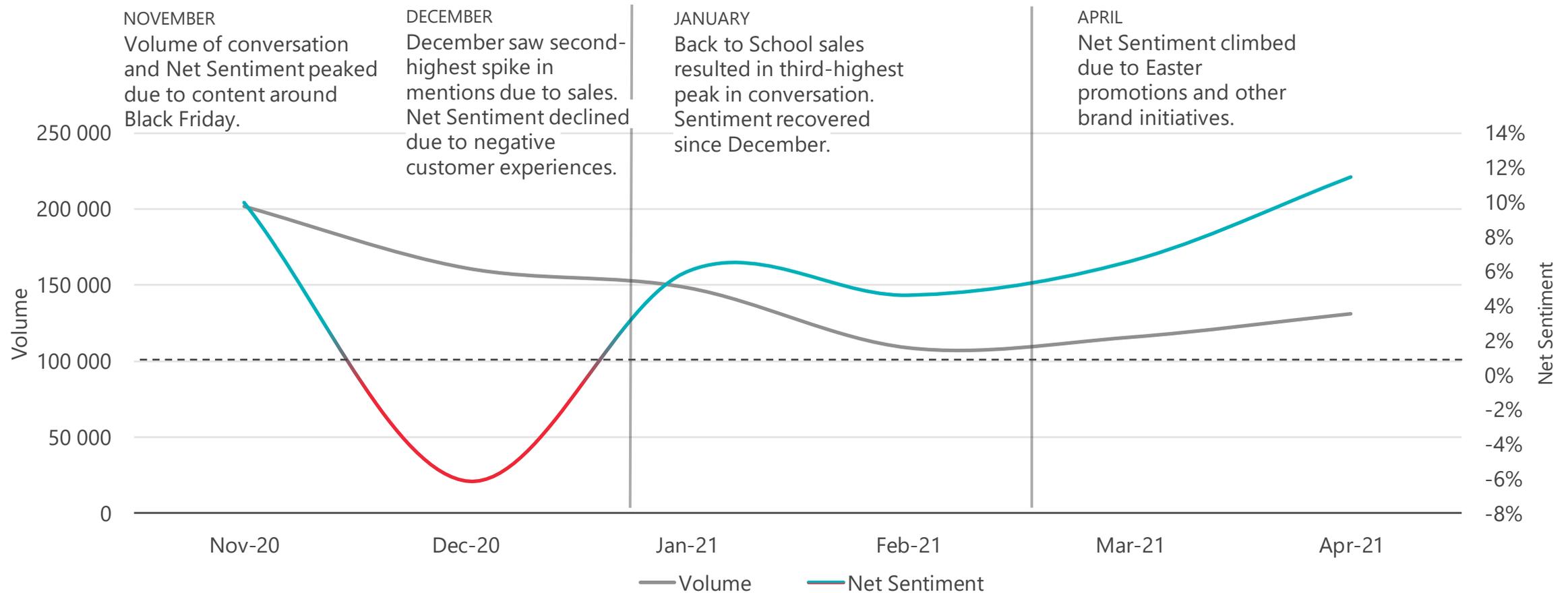


Some key points that stood out for the period 1 Nov 2020 to 30 Apr 2021:

- A. Black Friday sales and early Christmas promotions drove positivity in November. Consumers compared deals between retailers, sharing promotions, with price driving positive referrals.
- B. Allegedly a store manager poured boiling water on a staff member (outlier) at one retailer, sparking controversy.
- C. Consumers compared specials between retailers and praised back to school specials from clothing retailers.
- D. Net Sentiment continued to climb into April as the retailers shared content about their CSI initiatives and consumers referred promotional content with one another.

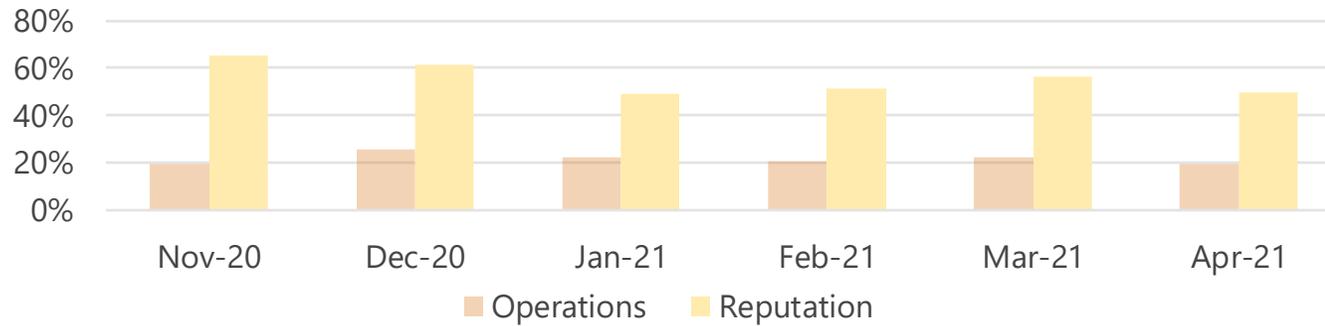
## OVERVIEW

Shopping events in the calendar also drove consumer engagement and emotions, the insights from their online conversation allows us to understand opportunities for future focus

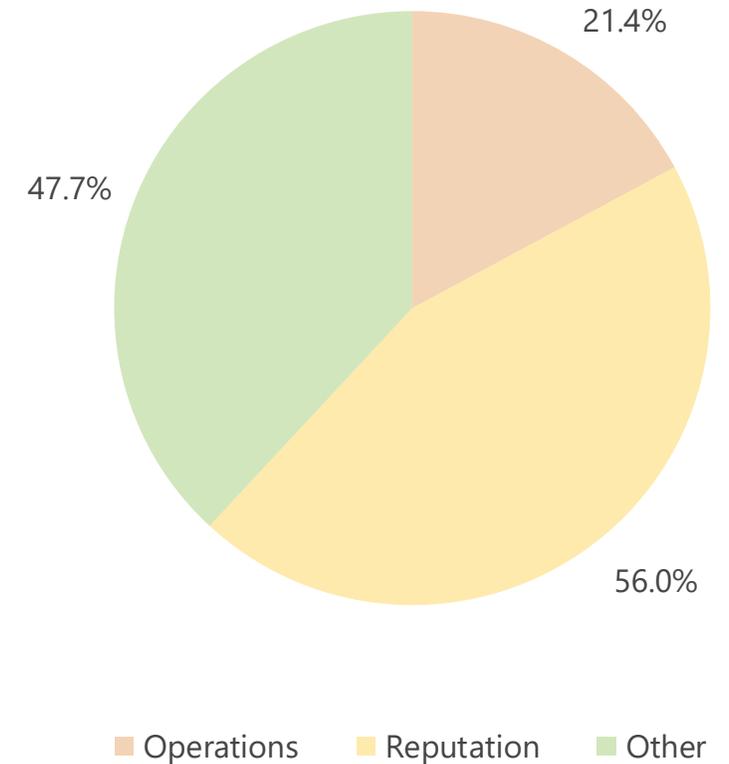


# Just under a quarter of conversation involved operations

Operational and reputational volume over time



Operational and reputational share of voice



- The majority of the conversation from November 2020 – April 2021 stemmed from engagement with reputational-type content, such as marketing collateral, peaking over November and again in December due to the emphasis on Black Friday and end-of-year sales.
- Just over 20.0% of consumer conversation was due to customer feedback around the retailers’ operations.
- Operational conversation was at its highest over December. A sentiment analysis indicated that consumer satisfaction was at its lowest over this time.

# Key operational themes discussed over the period

Spiking in this time period

Topic	Net %	Volume
Electronics or appliances	● -39.0%	659 <b>2</b>
Platform navigation (digital experience/UI/UX)	● -59.8%	374
Kitchenware	● 70.7%	232
Refunds, returns or exchanges	● -88.0%	549 <b>3</b>
No response received	● -99.6% <b>1</b>	451
How a company treats its staff	● -95.0% <b>2</b>	81
Tracking orders	● -85.4%	97
Fashionability/product aesthetic	● 68.2%	199
Speed or responsiveness of platform	● -88.6% <b>3</b>	203
Turnaround time	● -75.9%	2 122 <b>1</b>

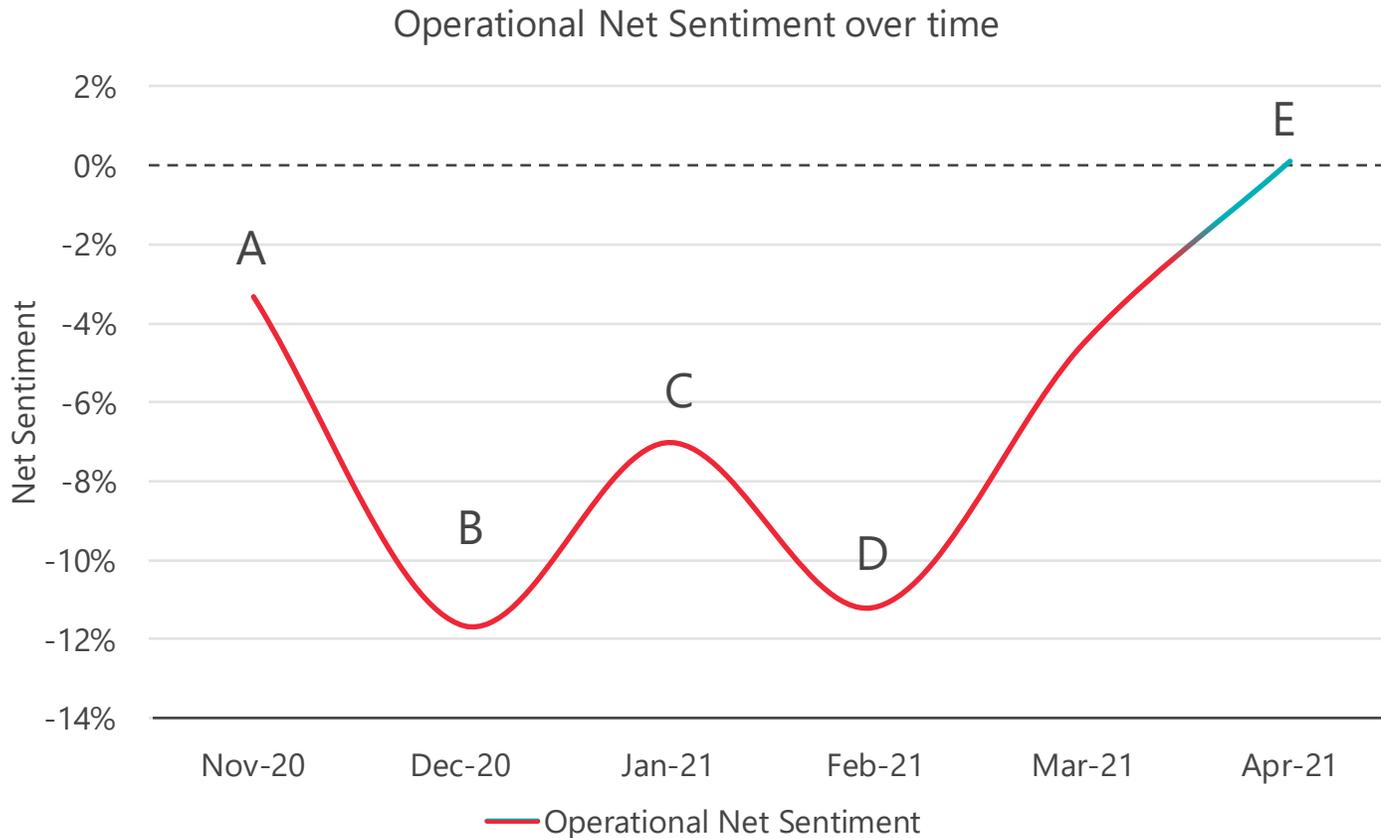
The topics which trended within operational conversation over the period.

**Turnaround time saw the highest volume\***, followed by electronics or appliances, and returns, refunds, and exchanges. These topics indicate key bottlenecks for shoppers over the reporting period.

**But what influenced sentiment were: waiting for a response, followed by treatment of staff.** Whereas, kitchenware (a promotion run by one of the grocery retailers on glassware), together with fashionability (of items from one of the clothing retailers) elicited the greatest positivity.

\*Volume indicates a sample of conversation.

# Higher customer expectations impacted operational Net Sentiment in December



- A. Operational Net Sentiment over November was -3.2%.
- B. The Net Sentiment declined over December to -11.6% **as issues with after-sales services and customer services** negatively impacted experiences.
- C. Operational Net Sentiment recovered over January, increasing by 4.6 percentage points since December.
- D. Sentiment declined over February as operational issues with customer service re-emerged.
- E. Net Sentiment was at its highest over April, indicating an overall recovery since November. Lower volumes of operational conversation over this time suggests that customer services teams were under less pressure than they were over November – March.

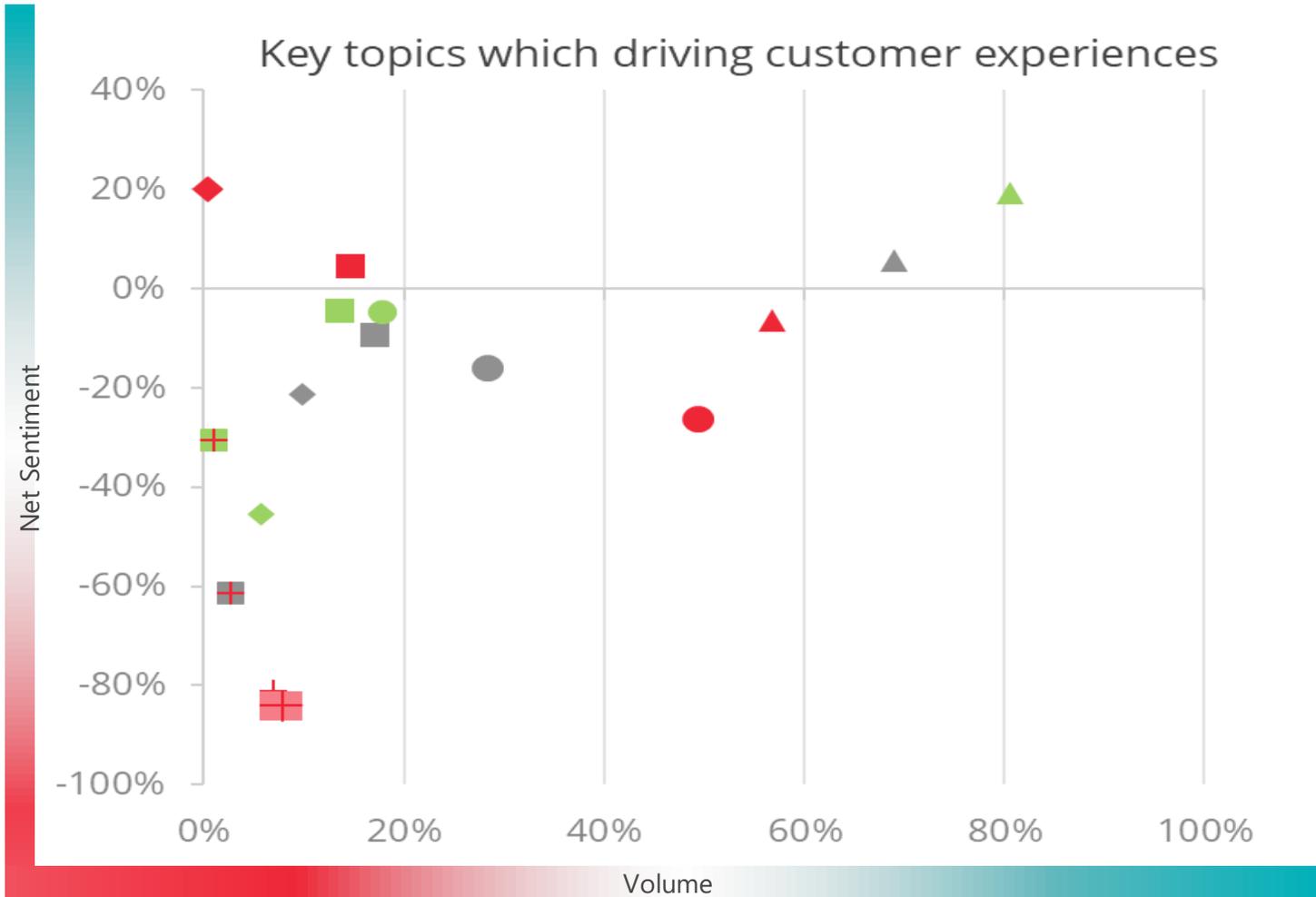
# Retailers total share of voice/ Net Sentiment

Operational volume and Net Sentiment per retailer

	Volume		Net Sentiment	
Retailer A	28.2%		9.3%	
Retailer B	16.4%		-5.4%	
Retailer C	15.0%		-12.8%	
Retailer D	10.8%		-17.2%	
Retailer E	9.7%		-12.8%	
Retailer F	7.9%		-12.3%	
Retailer G	4.9%		-13.6%	
Retailer H	4.5%		-38.3%	
Retailer I	2.7%		-1.0%	

- The following chart summarises the overall performance of each retailer over the given period.
- Just under a quarter of all conversation stemmed from conversation involving Retailer A.
- Retailer A saw the highest performance over the period, followed by Retailer I, and Retailer B.
- Consumers were most critical of Retailer H, and their experiences with Retailer D.

# Topics driving customer experiences: Retailer A vs D



The relationship between the volume and Net Sentiment of the top topics driving customer experience conversation.

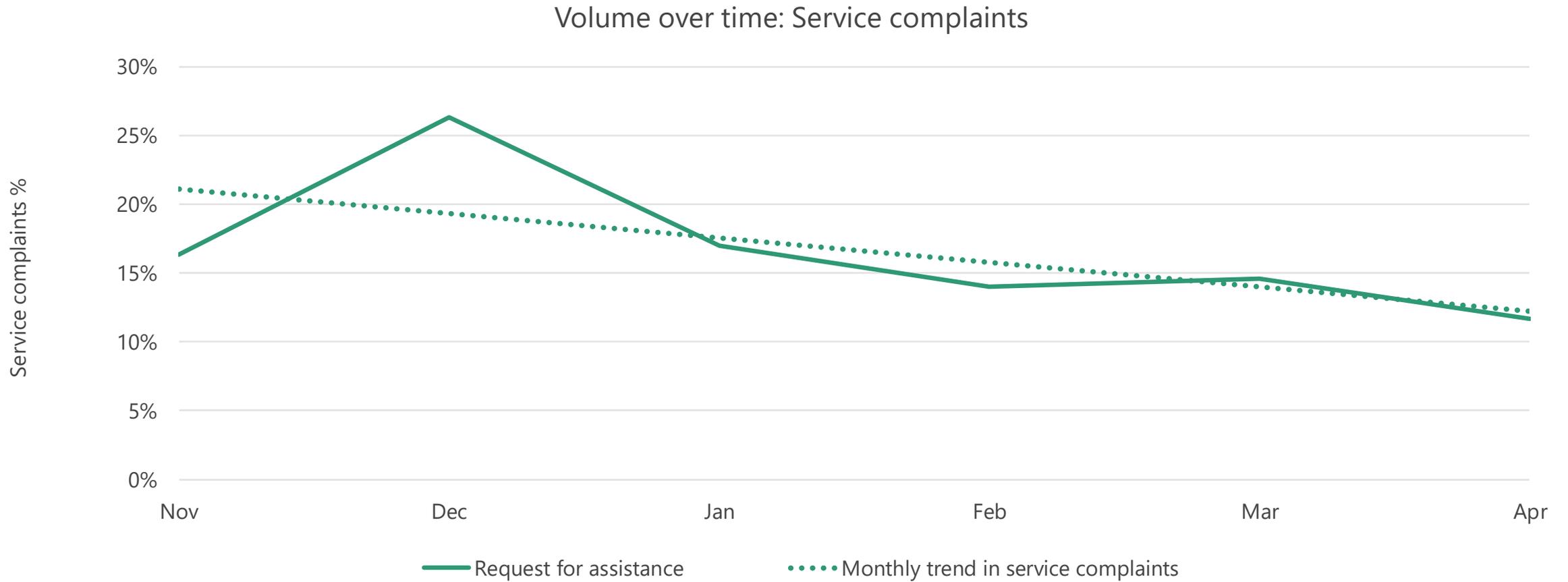
Findings are compared between retailer A (green), retailer D (red), and the overall industry (grey).

**Retailer A** performed above the industry aggregate for all topics, **performing notably better for its products, pricing, and staff.**

Retailer D performed lower than the industry aggregate across the board, with poor performance seen in its products and staff.

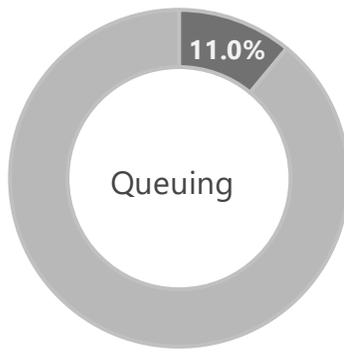
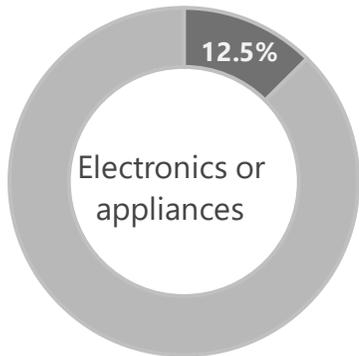
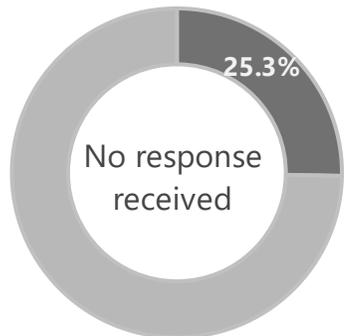
- ▲ Products
- Physical facilities
- Pricing
- ◆ Online facilities
- ⊕ Staff
- Industry
- Retailer A
- Retailer D

# Service complaints peaked over December



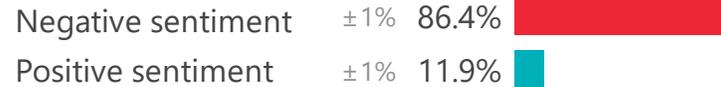
# Delays in operations spiked turnaround complaints, mostly over December

**Query resolution (no response received) emerged as a key theme in turnaround conversation**

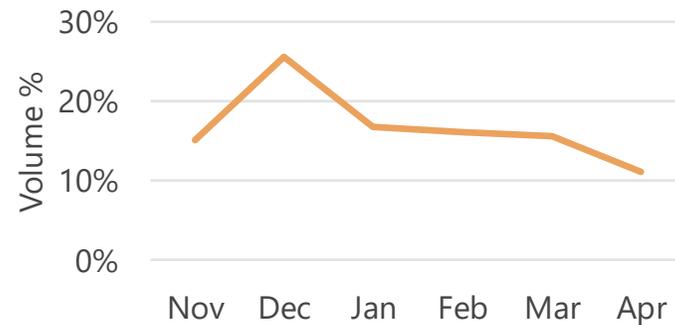


■ % of Key theme in turnaround conversation

**The majority of turnaround time conversation was negative**



**Complaints about turnaround time peaked in December**



**Turnaround time comprised 22.9% of all operational complaints** over the reporting period, making it the most prominent, driving factor in poor customer experiences.

Turnaround conversation peaked over December and tapered over the remaining 4 months.

Just under a third of turnaround conversation was due to **complaints about having to wait for a response from a retailer**.

**Delays in refund, returns, or exchanges** drove a further 18.0% of these complaints.

A further 12.0% of turnaround time conversation stemmed **customer experience issues involving electronics or appliances**, popular products consumers tended to purchase over this time. Lastly, 11.0% were due to having to queue in-store.

# Example mentions: Turnaround time

**Service**

 Please answer your dm.

2nd Dec 13:14 

**Service**

 am not happy with your online shopping. I used that service and most of the things I bought are almost expired. I sent an e-mail to you guys regarding this, no response or whatever from your side

2nd Feb 17:47 

**Service**

 Absolutely appalling communication on the PS5 pre orders. Was excited to get it today and I find out u don't even have stock yet. BT Games made sure they were ready for launch day and u telling me 7-14 working days from today. Pathetic.

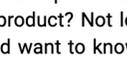
19th Nov 10:23 

**Service**

 Yesterday your delivery person came to deliver a cancelled order number #81054300. This morning again, someone came with the same product again. Can someone competent sort out this mess once and for all. I can't keep on doing this forever - And money be paid back.

14th Dec 10:10 

**Service**

 Anyone here had experience with exchanging a ( product? Not loving my current experience and want to know if 'we tried to deliver your order but couldn't' is a line they use a lot. We work from home, all the bells and whistles are working, we know when someone is here...

20th Apr 15:06 

**Service**

 May you kindly respond to my DM's

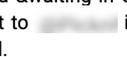
17th Feb 11:48 

**Service**

 there's a queue of elderly people at your RedRuth branch getting their grant - 2 tills are working. Atleast have a few chairs for them to sit while they wait.

3rd Mar 14:00 

**Service**

 am very angry that the store service was so pathetic this morning. The system was offline so we were not able to pay by card & waiting in Q's for so long. I left my goods & went to  instead. No management visibility at all.

24th Dec 11:36 

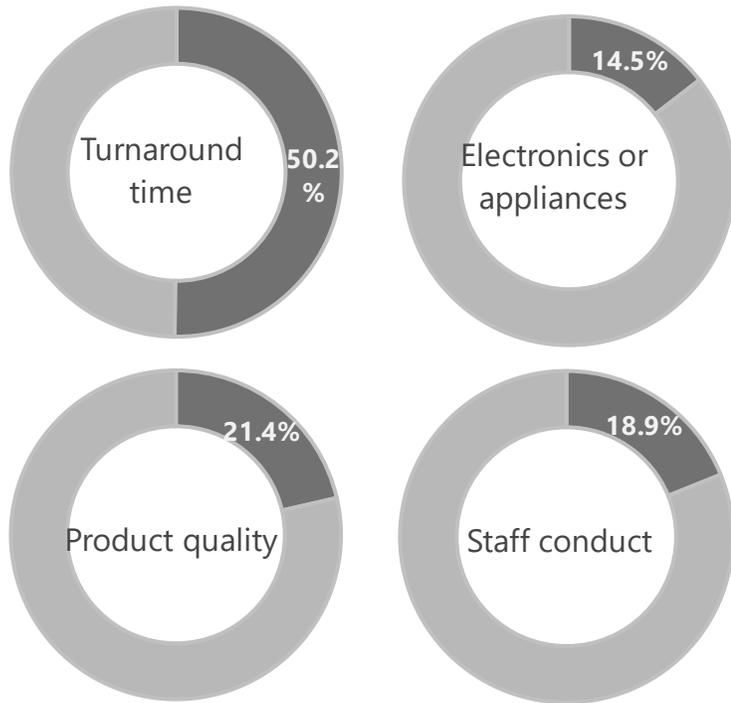
**Service**

 buy a new washing machine from you, it's broken, and I have to wait a week for a technician to come look before you replace it???

16th Mar 14:22 

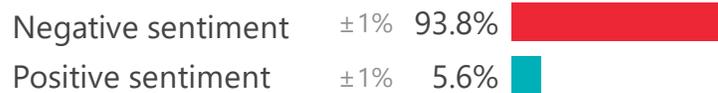
# Looking into the consumer frustrations around returns, refunds, and exchange policies, product quality and staff conduct were highest listed

## Quality around products, especially electronics and appliances were listed as reasons for returns, refunds, and exchanges

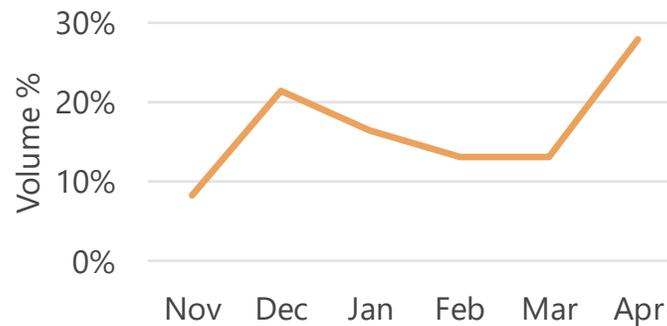


■ % of Key theme in refunds, return, and exchanges conversation

## Most of refunds, return, and exchanges conversation was negative



## Complaints about refunds, return, and exchanges peaked in December and again in April



Conversation involving returns, refunds, and exchanges comprised 6.4% of total complaints over the period, however, the topic trended over December, resulting in overall poor customer experiences during the festive season.

Promotions over November and early December resulted in high volumes of goods being purchased.

The increased demand put pressure on retailers and after-sales services were tested.

When making a return, or requesting a refund, consumers **complained the most about the quality of the product.**

Consumers also complained that **staff across the various retailers were unhelpful or misinformed about return policies.**

# Example mentions: Returns, refunds, and exchanges

**Service**

What is the right procedure for item that has been send back twice for repair while is still under warranty? I got no respond from your DM.

31st Jan 11:16 2

**Service**

Your Woodmead store won't take a return of a faulty item and the manager won't take my calls. Such poor customer service.

16th Mar 15:17 1

**Service**

I bought two sewing machines from [redacted] last year and have only been using the one. Now I've just realized when I opened the other one that it's actually faulty. I need to exchange asap 😞😞 [redacted]

1st Mar 11:00 1

**S Risk**

@sakho\_villa [redacted] go straight to the @CGSOmbudOffice sakho. [redacted] gives you hassles when you request a refund, they get their agents to intimidate you & drag their feet in communication

15th Jan 15:32 1

**Service**

Can someone please give me the actual person in charge of [redacted] woodmead? Nvm the fact they sold me a fridge that didn't even pass electrical tests, now the fridge has died and I've been trying to get this fridge exchanged for over 2 weeks now! Who do I talk to? t.co/Om34qdw2dq

30th Jan 16:51 1

**Service**

[redacted] who can I contact with regards to a faulty mobile phone unit replacement - in port shepstone kzn. The guys in the store are not being very helpful #pepcell ...

24th Dec 12:24 1

**Service**

bought a car vacuum, online from you guys and it wasn't working , returned it and still waiting for a new one, it's been over month now .....are you fixing the one you brought or what?

4th Mar 13:55 1

**Service**

Dear [redacted] Im so mush unhappy with laptop I bought from you last year, now It is for repairs it's the 2nd time within a period of 12 months. I need a new one or pay back my money. I will go buy somewhere else,my son can't do online school because of you fucked up device 🙄

14th Apr 11:14 2

**Service**

[redacted] packaging which is printed by your store. I got the refund but am extremely concerned with the managers attitude which might suggest that they sell rotten meat back dated and customers can not smell them because of masks. Please address my concerns.

19th Nov 18:10 1

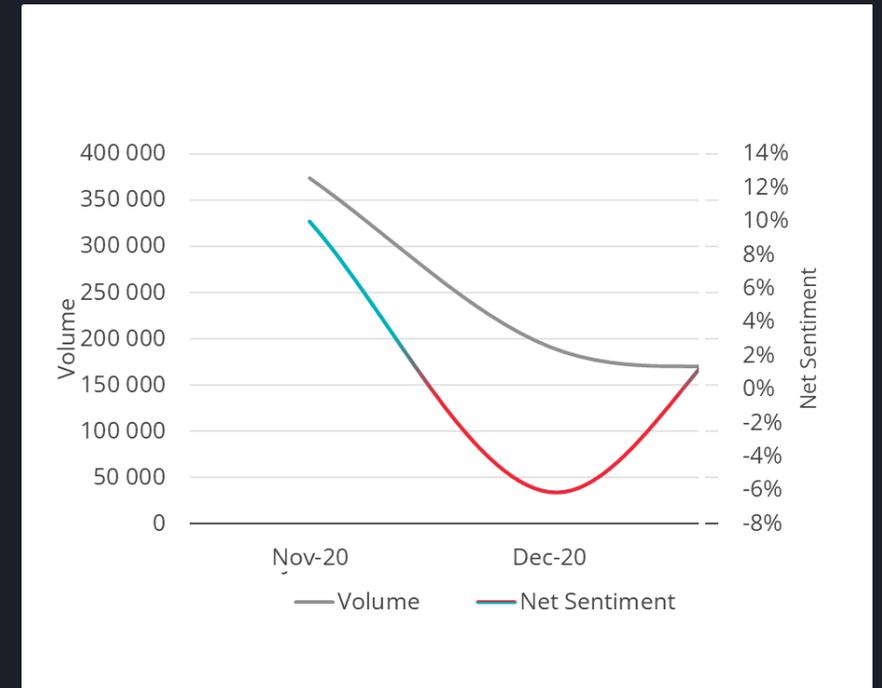
# Conclusion

- The festive season put considerable pressure on retailers to meet high consumer expectations around service and logistics, especially for e-commerce brands.
- Due to the public nature of social media conversation, consumers are exposed to negative feedback posted by those who have shared unfavourable customer experiences.
- Sale periods/ seasons which cannot deliver on the increased demand run the risk of losing consumers to competitors.
- The following section will deep dive into the November – December period and will show:
  - Customer experiences are negatively impacted by logistical issues around refunds, returns and exchange process.
  - Due to the highly competitive nature of festive season promotions, well intended marketing collateral can increase positivity, but it can also miss the mark and not elicit positive engagement.

# Festive season

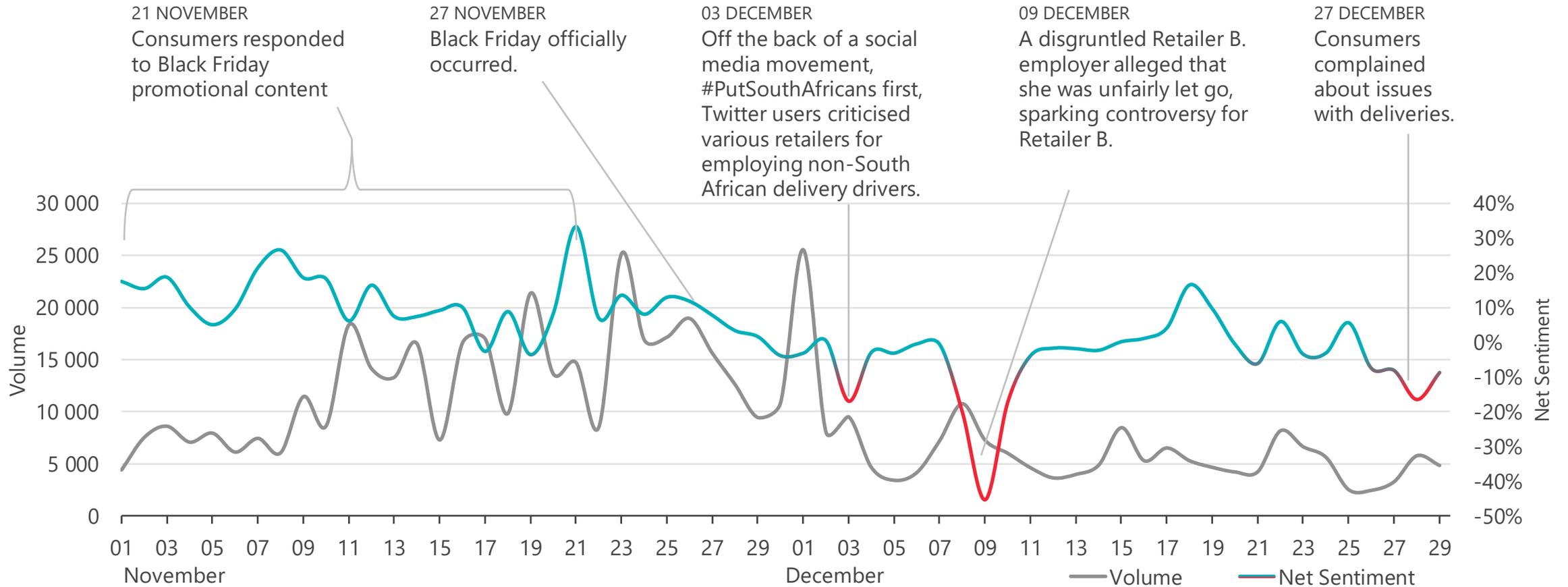
## November – December 2020

During this period, events and promotional content drove shopping demand and conversations. Due to the volumes and emotional content of the events, shoppers were more engaging and critical of their experiences.



# Trends in conversation

Industry volume and Net Sentiment plotted over time



# Key findings over the festive season



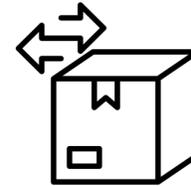
Marketing performance

Consumers were most engaged over Black Friday. Marketing strategies which relied on automated posts were the most effective.



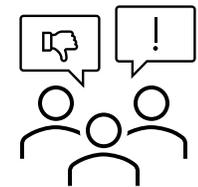
Pricing strategy

Consumers looked for better deals over November, but were critical of pricing strategies over December. Especially for grocery retailers.



Refunds, returns, and exchanges

Increased reliance on customer services put pressure on return, refund, and exchange operations over the festive season.



Customer service

Consumers expected better query resolution and response times from customer services agents over December.



## Marketing strategies which relied on automated posts were the most effective

### Retailer H and G’s use of Twitter ad units inflated positive engagement with Black Friday content

Retailer H and G, flooded Twitter with automated brand posts over November. 87 830 and 43 863 times, respectively.

The automated posts offered consumers the opportunity to be notified of Black Friday sales.

Due to the nature of the content in these posts, they elicited positive engagement from consumers. Both retailers saw the highest volume of Net Sentiment over this month with 33.5% and 24.3% respectively.

Automated posts positively informed the digital strategy for retailers over November 2020.

	Brand content	Consumer Net Sentiment
Retailer H	87 380	33.5%
Retailer G	43 863	24.4%
Retailer C	27 786	5.4%
Retailer E	5 425	-0.1%
Retailer A	78	11.1%
Retailer D	41	-5.1%
Retailer B	17	10.5%
Retailer F	18	7.0%
Retailer I	0	9.0%



# Marketing strategies which relied on automated posts were the most effective

Retailer E and C’s consumers were highly engaged over Black Friday, but this did not result in positive sentiment

Retailer E and C’s consumers posted and reshared content the most over November.

Retailer C’s consumers posted a total of 38 408 mentions, whereas, Retailer E’s, 37 907.

Despite these high volumes of engagement, the retailer’s Net Sentiment was lower when compared to that of its competitors.

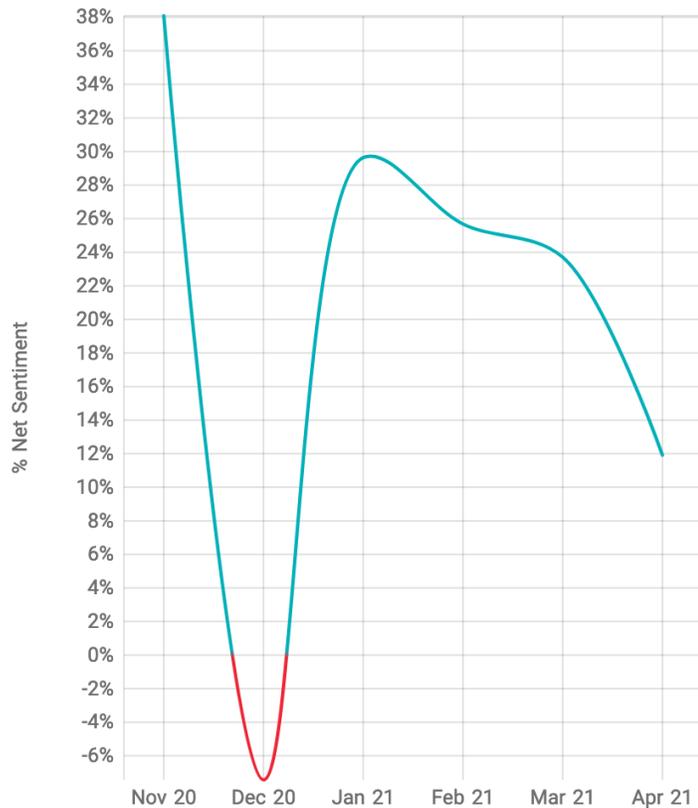
Both retailers relied on competitions and brand content which encouraged consumers to engage. However, due to negative experiences with operations, neither brand performed particularly well, sentiment-wise.

	Consumer posts	Consumer Net Sentiment
Retailer H	8 618	33.5%
Retailer G	16 400	24.4%
Retailer C	38 408	5.4%
Retailer E	37 097	-0.1%
Retailer A	28 967	11.1%
Retailer D	19 487	-5.1%
Retailer B	20 206	10.5%
Retailer F	29 188	7.0%
Retailer I	2 832	9.0%



# Consumers looked for better deals over November, but were critical of pricing strategies over December.

Industry Net Sentiment of Pricing over time



## November sales praised, December criticised

Conversation around pricing and affordability spiked in both volume and Net Sentiment over November, as Black Friday sales saw praise.

Consumers praised Retailer I and H's prices the most over this period.

This could indicate that across the period, Black Friday sales were the most aligned with customer expectations.

The Net Sentiment dramatically declined over December. Consumers were critical towards the pricing strategies of the grocery retailers. Retailer F, followed by Retailer C received the most criticism.

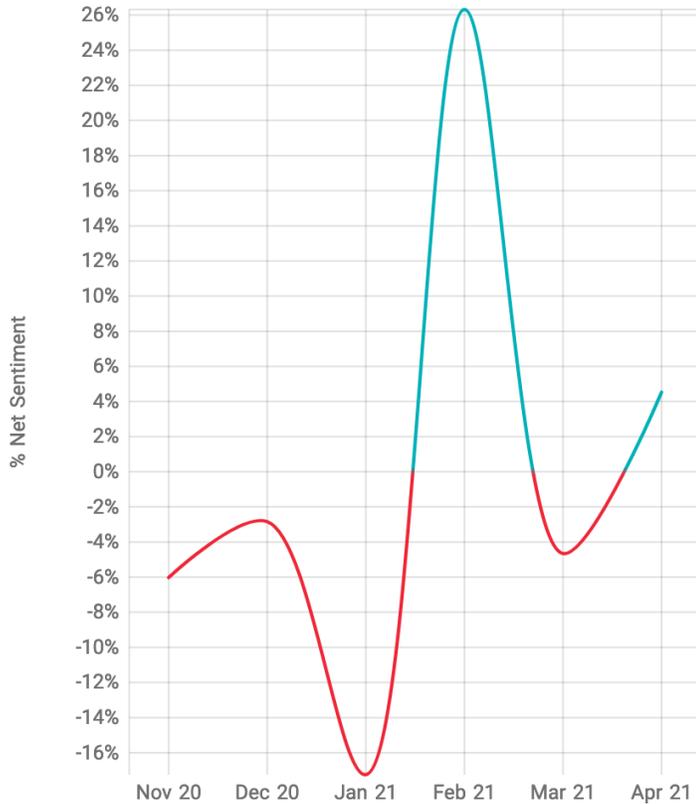
Volume and Net Sentiment of Pricing

	Volume	Net Sentiment
Retailer A	23.6%	18.5%
Retailer F	21.6%	-8.6%
Retailer C	14.7%	1.9%
Retailer B	11.5%	34.0%
Retailer D	10.8%	36.4%
Retailer H	6.1%	77.6%
Retailer G	5.5%	55.3%
Retailer E	4.4%	5.8%
Retailer I	1.7%	79.0%



# Consumers looked for better deals over November, but were critical of pricing strategies over December.

Retailer C: Net Sentiment of Pricing



Retailer C was scuppered by its pricing strategy over the festive period

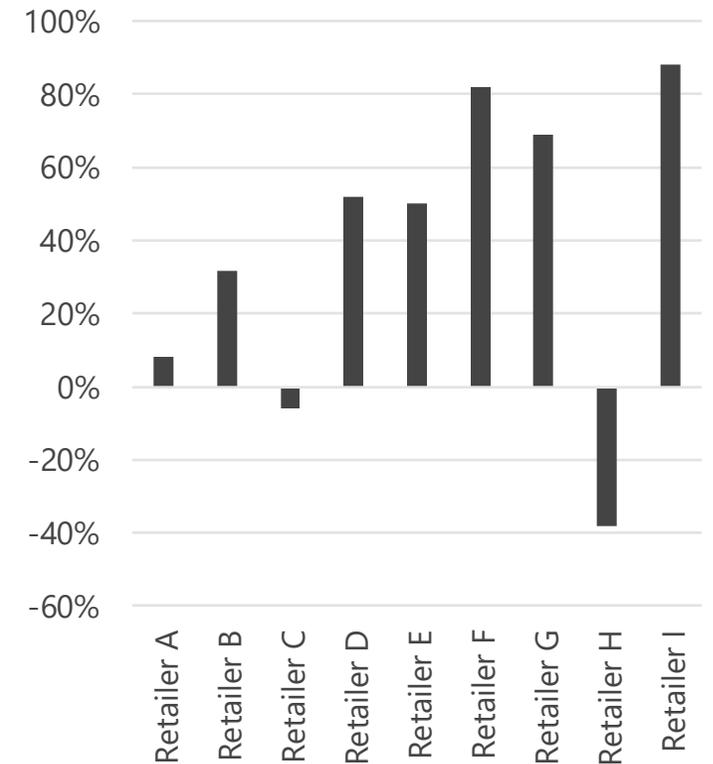
Looking at Retailer C's pricing Net Sentiment over time, relative to the rest of the industry, the retailer saw particularly poor customer satisfaction over November and January.

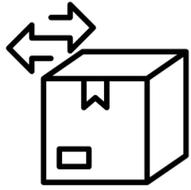
Consumers also accused the retailer of price gouging, saying that they increased prices just prior to Black Friday.

Conversation around affordability subsequently recovered over February when the brand ran its Swipe and Save deals.

This could indicate that Retailer C performed better (Net Sentiment-wise) during shopping periods where there was less competition from peers.

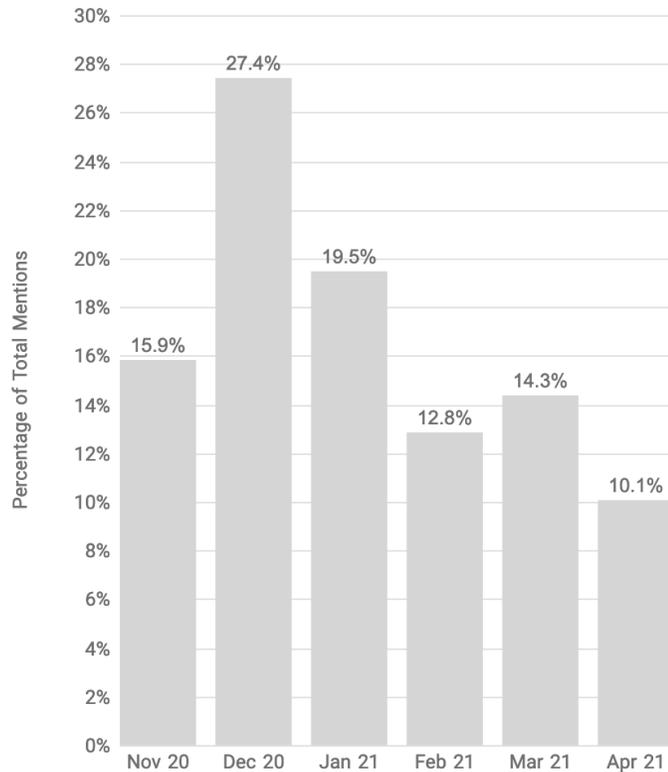
November: Net Sentiment of Pricing





# Increased reliance on customer services put pressure on operations and returns

Operations: Volume of conversation about online facilities



## December saw greater reliance on grocery deliveries

Consumers spoke about relying on online facilities the most over December, primarily with grocery retailers.

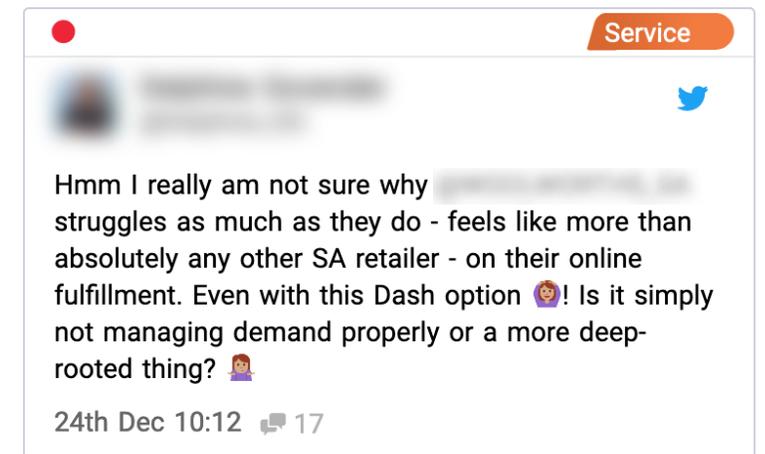
December saw almost double the amount of conversation about online shopping than November.

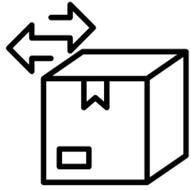
Notably, consumers discussed the grocery retailers the most: Retailer B, A, and C. All of which offer delivery services. All three retailers saw overall negative Net Sentiment.

This finding indicates a greater reliance on grocery online facilities over December with heightened expectations around operations.

December: Volume and Net Sentiment about online facilities

	Volume	Sentiment
Retailer B	64.0%	-4.8%
Retailer A	21.5%	-48.5%
Retailer C	13.1%	-48.4%
Retailer F	0.8%	25.0%
Retailer D	0.6%	33.3%



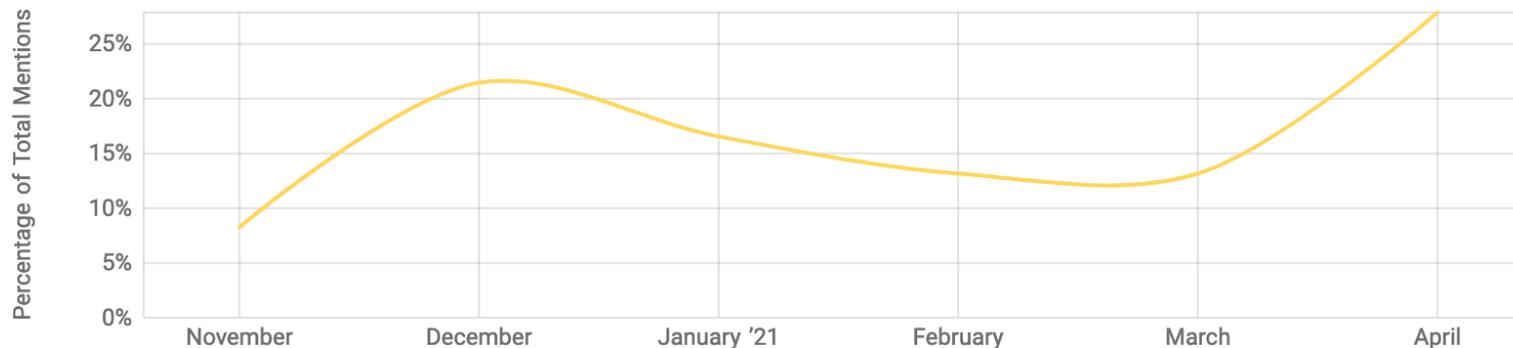


# Increased reliance on customer services put pressure on operations and returns

Volume of complaints about refunds, returns and exchanges, top three retailers

	Volume
Retailer D	43.9%
Retailer E	30.6%
Retailer H	25.5%

Industry volume of complaints about refunds, returns and exchanges



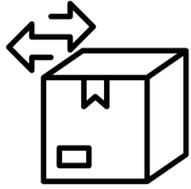
## Refunds, returns, and exchanges remained a challenge

Over the festive season, consumers were most critical of Retailer D when returning products. Consumers vented about the inconvenience of returning goods due to issues around quality and freshness. This conversation spiked over April.

Retailer H was scuppered by its lengthy procedures to reimburse returned products in January, indicating issues around its after-sales services.

Retailer E's consumers were unhappy with the process around the collection of products to be returned and delays in having their queries attended to and resolved.

Retailer E's consumers also were frustrated with the quality of products received- often listing this as a reason for returning goods.



# Example mentions: Return, refunds, exchanges

**Service**

Dear @brands\_za here's another one kept until the last day on shelves, now I need to go back to the shop 😞 t.co/0sBZHfa2z3

6th Apr 17:46 🗨️ 1 📷

**S Risk**

@brands\_za You are one of the most unreliable online store ever , you sold me something you don't have on stock and now you refusing to give me my refund , I will definitely open a case for you and will spread a word to all trending stories to expose you how bad your service is

15th Jan 13:25 🗨️ 2

**Service**

@brands\_za requested a pickup for a return on an item on the 2nd, immediately after I received the item. It's 8 days later and it still hasn't been picked up. Is this standard? Or now that you sitting with my money, you don't care anymore?

10th Feb 23:45 🗨️ 1

**Service**

@brands\_za kindly check my DM. It's regarding an exchange item that was not exchanged and no feedback. I'd appreciate it

12th Jan 12:11 🗨️ 1

**Service**

#BringBackMyMoney We work hard for our Money and then nisidayisela inyama ebolile 🤔🤔🤔🤔🤔🤔🤔🤔 what must I do to get back my Money??? @IssolezweNews @ukhozi\_fm @METROFMSA @SABCNews @AdvoBarryRoux @brands\_za

11th Nov 19:21 🗨️ 1

**Service**

@RealNtozonke @akreana\_ @brands\_za Hello sir please read to understand. I never said they build a laptop this tweet said. I want my REFUND, I no longer want any brand of laptop

18th Jan 19:58 🗨️ 1

**Service**

@brands\_za I logged a request on the 9th of December for the first time around a product that was missing from my delivery. It is the 21st of Jan today and I still have not received a refund or the missing product. Agents are promising resolution but nothing gets done.

21st Jan 13:48 🗨️ 1

**Service**

I am struggling with a return item 😡😡😡  
Quote tweeting YT: ILIZWI ELIHLE:  
I have a @brands\_za order that keeps getting delayed, im frustrated now can i just cancel the order and be refunded 😞😞😞😞😞

4th Feb 15:27 🗨️

**Service**

@brands\_za must have the worst online service in the world. How am I still waiting for a refund 1+ month later.

22nd Jan 20:58 🗨️ 2

**Service**

@Ntomza\_Nkosi @brands\_za Sis, I've been waiting for my refund for 2 months now. They have the worst client service

27th Jan 14:54 🗨️ 1

**Service**

@brands\_za hi there. A return was collected on the 1st of December and there is still no word on the status. Please help. It's been a week now.

8th Dec 21:03 🗨️



# Better query resolution and response times from customer service are expected

Volume of mentions: No response received, top three retailers

Volume

Retailer H	42.3%	
Retailer A	31.5%	
Retailer C	26.1%	

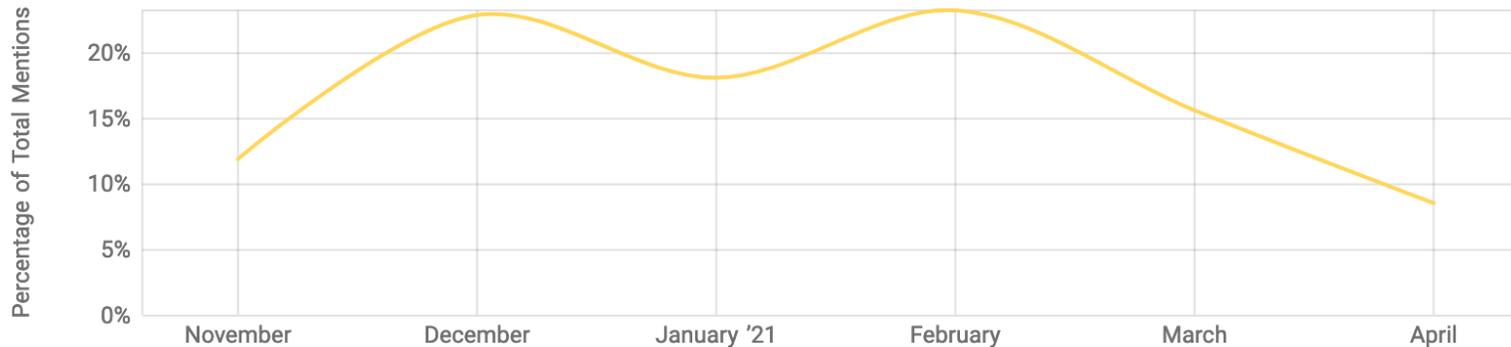
## Responses: Query resolution

Consumers who shopped at Retailer H, A, and C were frustrated with the length of time retailers took to respond to and/or resolve complaints.

Conversation spiked twice over the period, once over December and again in February.

Typically, consumers try other channels prior turning to social media (see next slide).

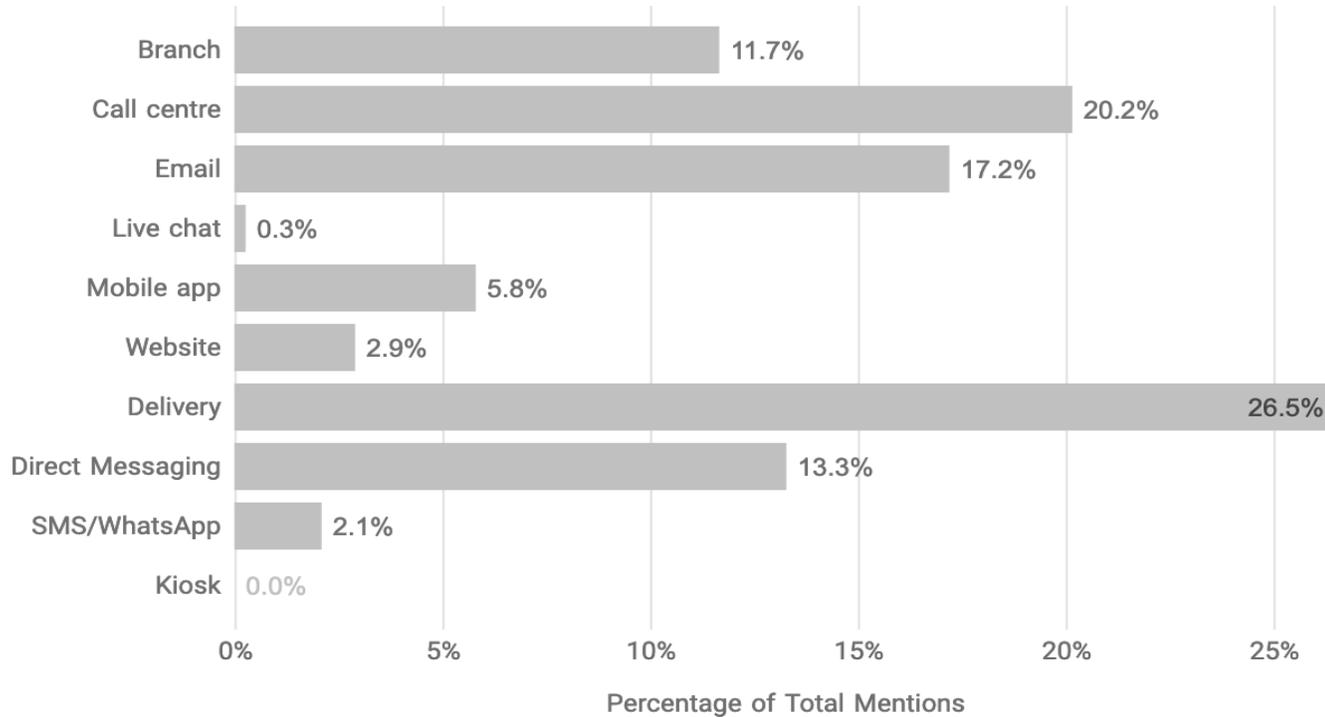
Industry volume of mentions: No response received





# Better query resolution and response times from customer service are expected

Volume of mentions: Channels



Consumers wait for feedback and responses following deliveries and trying call centres first

The channels mentioned by consumers in 'no response received' conversation.

Just over a quarter of the conversation indicated that consumers were waiting for assistance on deliveries.

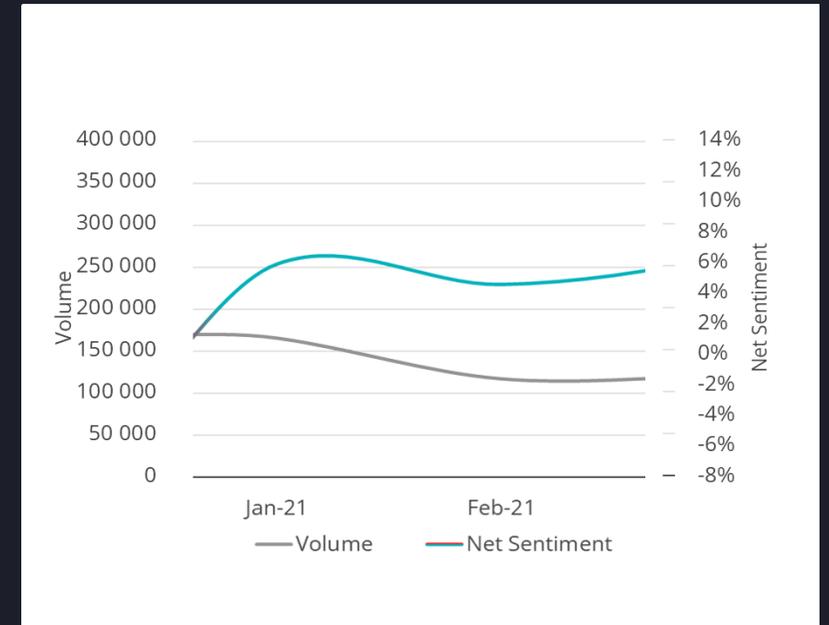
20.2% cited that they had tried to contact a call centre, or phone a branch prior to logging the complaint on social media.

A further 17.2% said that they had previously tried to email the retailer in questions and not received a response.

# New year & back to school

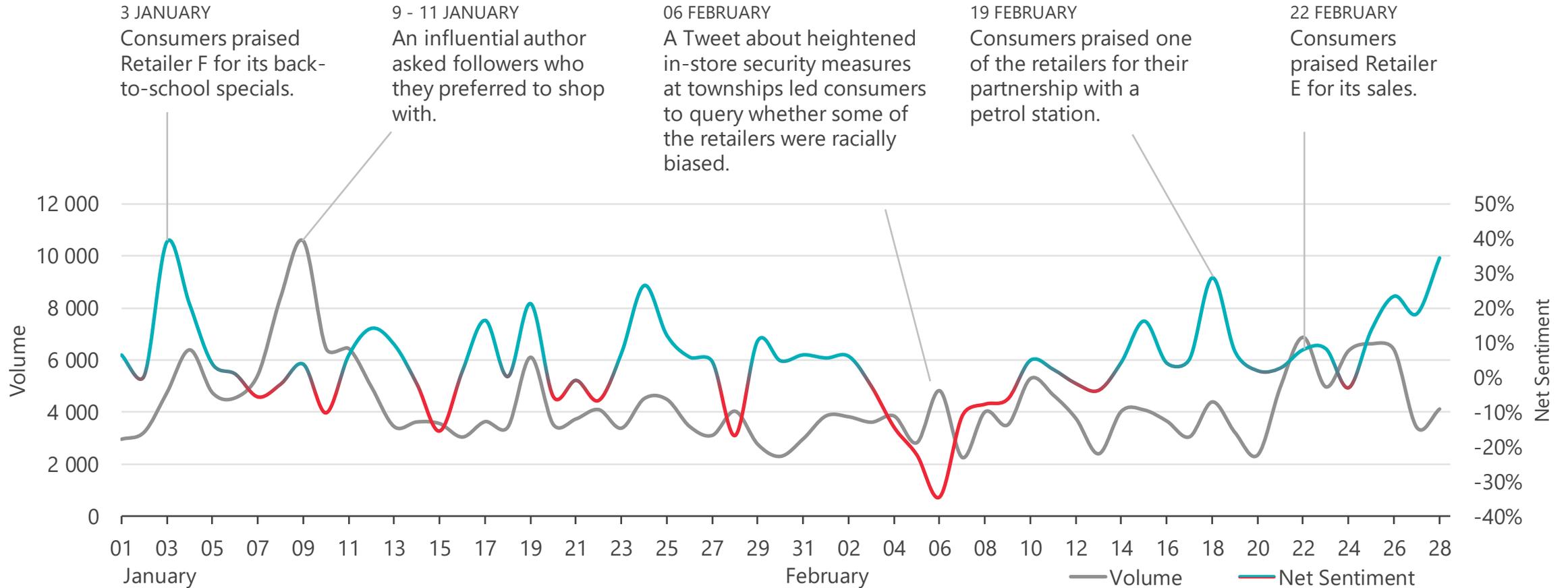
## January – February 2021

As retailers caught up with the festive season, engagement volumes and resolved issues, sentiment increased during this period.



# Trends in conversation

Industry volume and Net Sentiment plotted over time

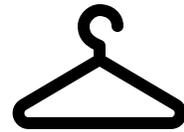


# Key findings over January - February



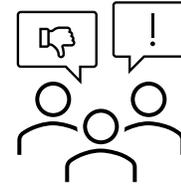
## Marketing performance

Consumers were more positive towards brand initiatives over the new year than they were over the festive season.



## Retail divisions

Content about clothing was most prominent in January. This especially was notable for school clothing. Consumers were actively comparing brands looking for best prices on items.



## Customer service

Operational issues re-emerged over February as sales put pressure on customer service expectations and existing operational issues.



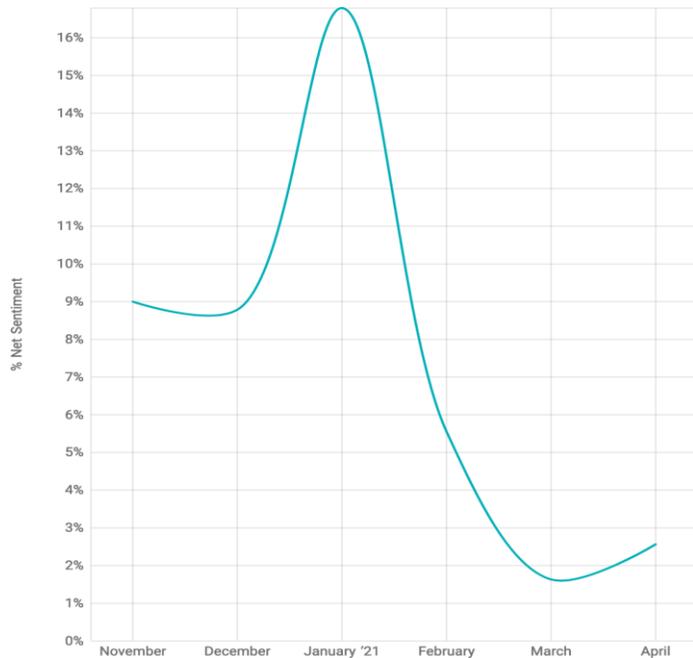
## Pricing strategy

Consumers continued to be sensitive to conversation around price hiking.



# Consumers were more positive towards brand initiatives

Net Sentiment for Retailer I over time



## Retailer I dove-tailed promotions with CSI initiatives making it highest performer over January

Clothing retailer, Retailer I experienced the highest overall Net Sentiment when compared to the rest of the industry over January.

The brand dove-tailed its back-to-school promotions with its CSI initiatives. Customers were presented with the opportunity to donate to anonymise lay-by accounts when purchasing back to school items.

Consumers responded well to this initiative, praising the brand for its ingenuity.

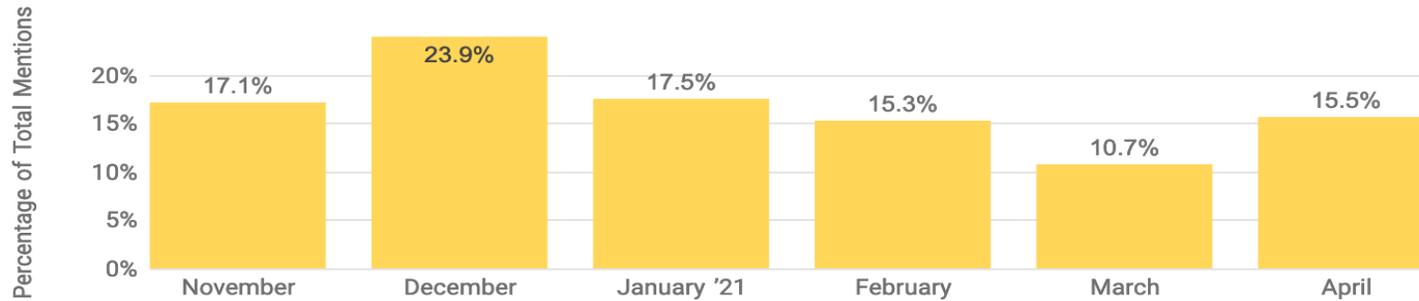
Volume and Net Sentiment of retailers over January

	Volume	Net Sentiment
Retailer A	12.9%	12.9%
Retailer F	11.8%	11.8%
Retailer C	10.4%	10.4%
Retailer B	0.8%	0.8%
Retailer D	-4.6%	-4.6%
Retailer H	-43.3%	-43.3%
Retailer G	1.6%	1.6%
Retailer E	-10.7%	-10.7%
Retailer I	16.8%	16.8%



Consumers were actively comparing clothing brands looking for best prices on items.

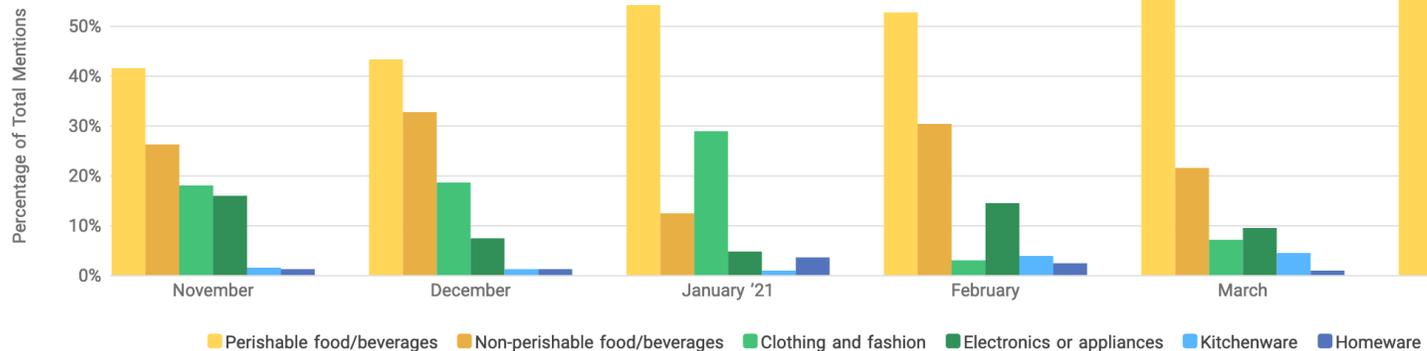
Volume of topic: Comparing brands over time



Retail divisions over time: Clothing and fashion saw its highest volume over January

Consumers continued to make brand comparisons over the Jan-Feb period. Although most comparisons were made over December, customers continued to scrutinise sales and promotions in the new year.

Volumetric trend analysis on product divisions over time



Clothing and fashion saw its highest volume of mentions over January when compared to the previous period (Nov 2020 – April 2021). Conversation about this topic subsequently declined over the remaining months of February, March, and April.

Looking at these trends, retailers can consider the timing of which retail division to market.



Consumers were actively comparing clothing brands looking for best prices on items.

Clothing retailers over January

	Volume	Positive	Negative
Retailer F	61.4%	99.8%	0.0%
Retailer I	20.5%	98.0%	2.0%
Retailer A	18.1%	67.9%	29.8%

Clothing conversation was most positive over January

Conversation and Net Sentiment about clothing and fashion spiked over January.

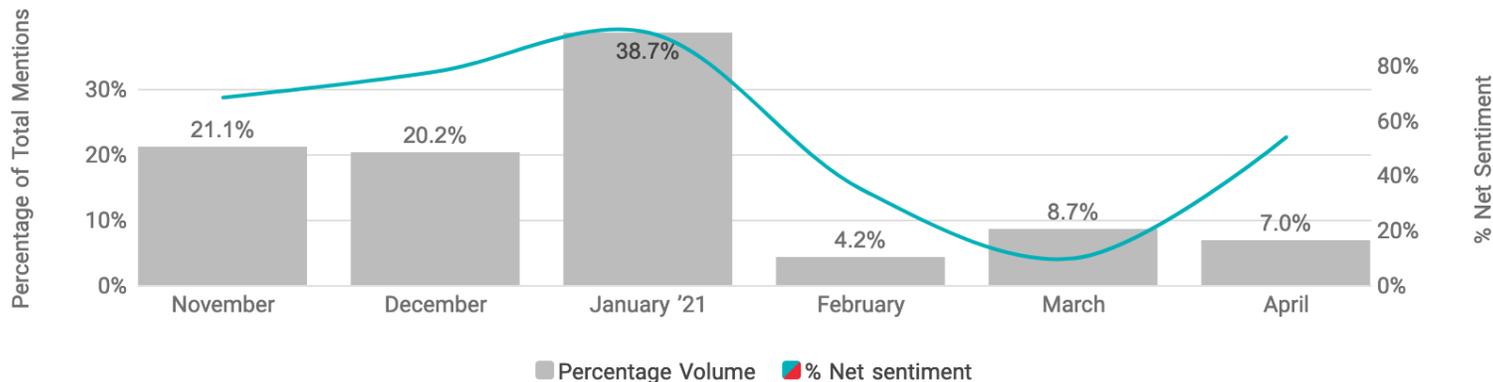
Retailer F (A grocery retailer) promoted Beta school shoes and stationary. News around the sale trended as consumers encouraged each other to retweet mentions about the sale.

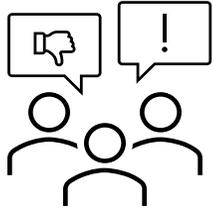
Retailer I saw a 20.5% share of voice for this topic and an overall 98.0% positive sentiment. This was largely due to back to school sales.

Retailer A saw the third-highest volume and positive sentiment with 18.1% and 74.0% respectively. The retailer was praised for its clothing sales in general.

Retailer F has demonstrated that its peers who aren't traditionally aligned with back to school deals can leverage of this time of the year.

Volume and Net Sentiment towards clothing and fashion over time





# Operational issues re-emerged over February as sales put pressure on customer service

Issues with operations re-emerged over February but reputational sentiment improved

January saw improved operational performance when compared with the festive season. However, operations declined again in February. Operational Net Sentiment was -9.0% over the Jan – Feb period, a 0.9 pp decline since Nov – Dec.

Recurrent operational issues re-emerged over February, such as turnaround negatively impacted experiences. Notably, consumers also listed product quality as an area of concern.

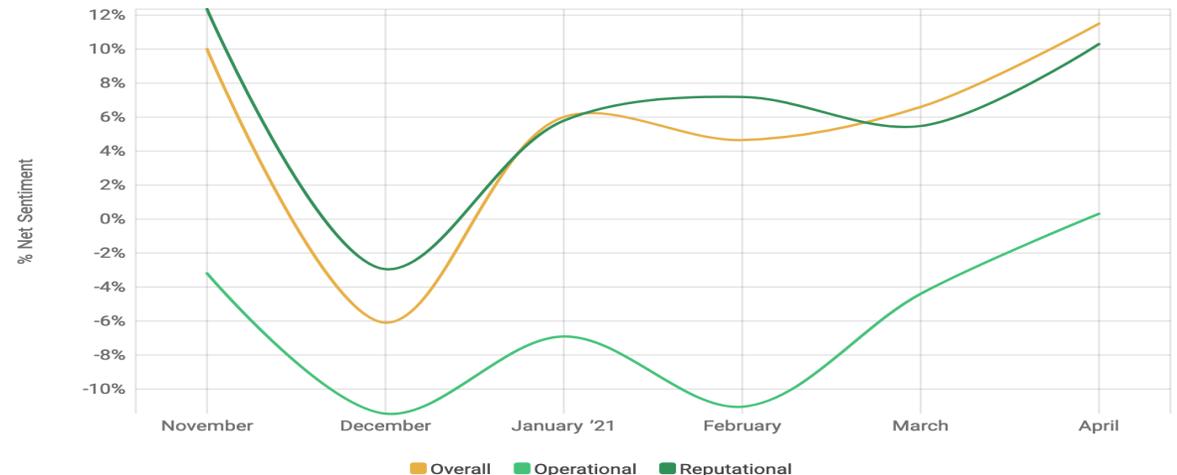
Consumers were more positive about brand initiatives and promotions over the new year, as reputational Net Sentiment increased by 4.6 pp.

*\*Comparison dates: November – December 2020*

Operational & reputational Net Sentiment\*

	Net Sentiment	
Operational Net Sentiment	-9.0%	▼ 0.9 pp
Reputational Net Sentiment	11.4%	▲ 4.6 pp

Operational, Reputational, overall Net Sentiment over time





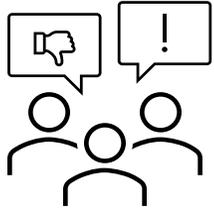
# Operational issues re-emerged over February as sales put pressure on customer service

## Key operational topics discussed over the period

	Topic	Net %	Volume
Spiking in this time period	Refunds, returns or exchanges	3 ● -87.2%	219
	No response received	1 ● -100.0%	172
	Product quality	● -60.4%	579
	Turnaround time	● -79.5%	688
	Speed or responsiveness of platform	2 ● -91.2%	57
	Perishable food/beverages	● -1.7%	1 169
	Affordability	● -27.4%	3 727
	Comparing brands to brands/industries/internally	● 9.6%	2 742
	Electronics or appliances	● -50.9%	175
	Product taste	● 33.6%	116

Looking at the key operational topics over January – February, a few re-emerged as consistent and ongoing issues for customers. Such as refunds, returns, exchanges, turnaround time, and no response received. Consumers complained about Retailer H and E for their return policies again.

\*Volume indicates a sample of conversation.



# Operational issues re-emerged over February as sales put pressure on customer service

Volume of mentions: No response received, top three retailers January - February

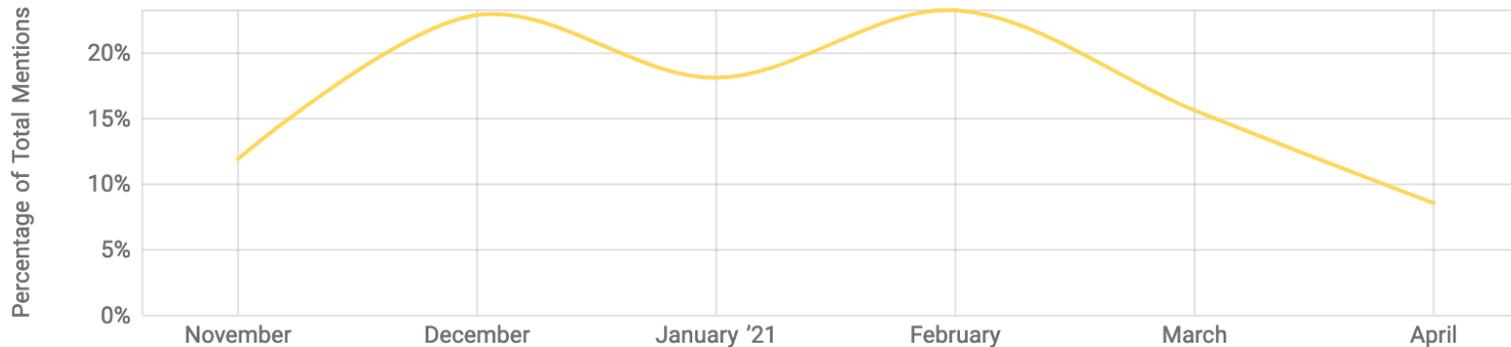
	Volume
Retailer G	36.9%
Retailer H	31.9%
Retailer A	31.3%

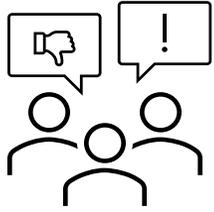
## Responses: Query resolution

Consumers who shopped at Retailer G,H, and A were frustrated with the length of time retailers took to respond to and/or resolve complaints over February.

Consumers complained consistently about Retailer G and A in this regard, both mentioned earlier in this report.

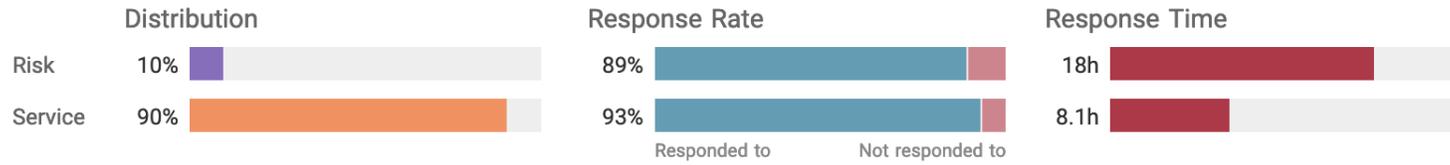
Industry volume of mentions: No response received





# Operational issues re-emerged over February as sales put pressure on customer service

Response time analysis: Retailer G January & February



## Query resolution: Retailer G responds to many of its queries but isn't able to fully resolve them

The following chart shows a response rate analysis for Retailer G over January – February period. The retailer responded to 93.0% of its service queries within 8.1 hours.

Despite this, query resolution remained a key issue for the retailer.

Notably, the brand responded to many queries, however, it is unable to close the information feedback loop with its consumers.

The delay in successful resolution of issues raised by consumers, compounds frustration and exposes the brand to further slander online.

**Service**

I wouldn't advise anyone to use @RetailerG online services! I've never been sent from pillar to post so many times trying to sort out delivery of the wrong item! Delivered 29th December and all call agents say they don't know why it hasn't been collected and replaced! Yhu ha a

12th Jan 10:29 5

@thegirlloyiso @RetailerG @RetailerG No ways Cleo 🙄 this is unacceptable! A while three months. You are very right, they ask you to send an email of your query/complaint and then remain quiet. And with this system you're unable to track your xchange log.

12:19 1

@\_vuyelwa\_ Hi Vuyelwa 🙄 I do apologize for any inconvenience caused this far 🙄 We are actively working on your query and will inform you once we have any update 🙄

12th Jan 10:43

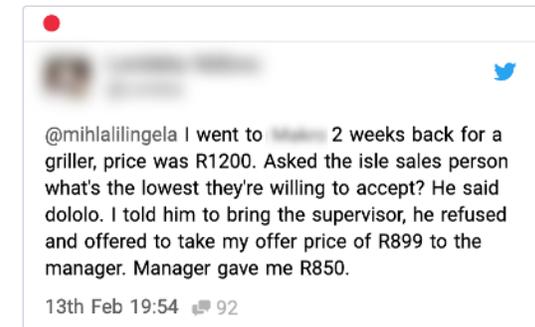
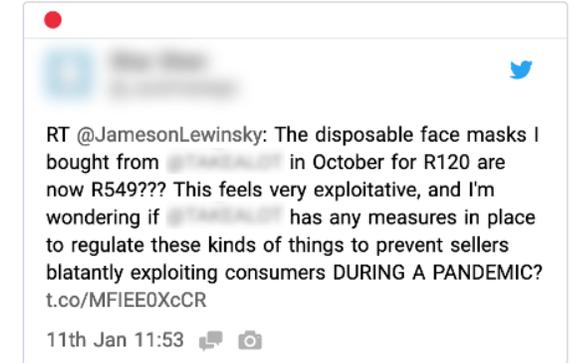
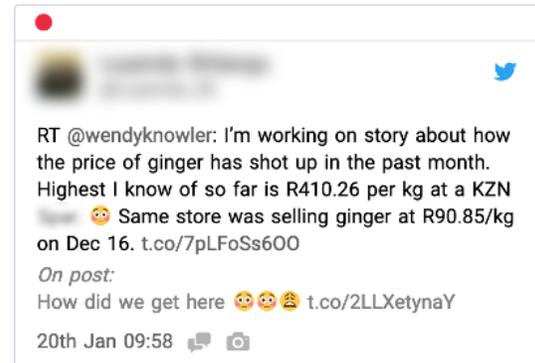


# Consumers continued to be sensitive to conversation around price hiking

## Consumers were sensitive towards possible changes in pricing

Over the January – February period, the topic of pricing changes trended in negative conversation, highlighting the sensitivity of price gouging and possible price hiking across retailers. Consumers originally started querying price hikes at the start of lockdown measures in 2020, resulting in almost 30 convictions and settlements from the National Consumer Commission (NCC).

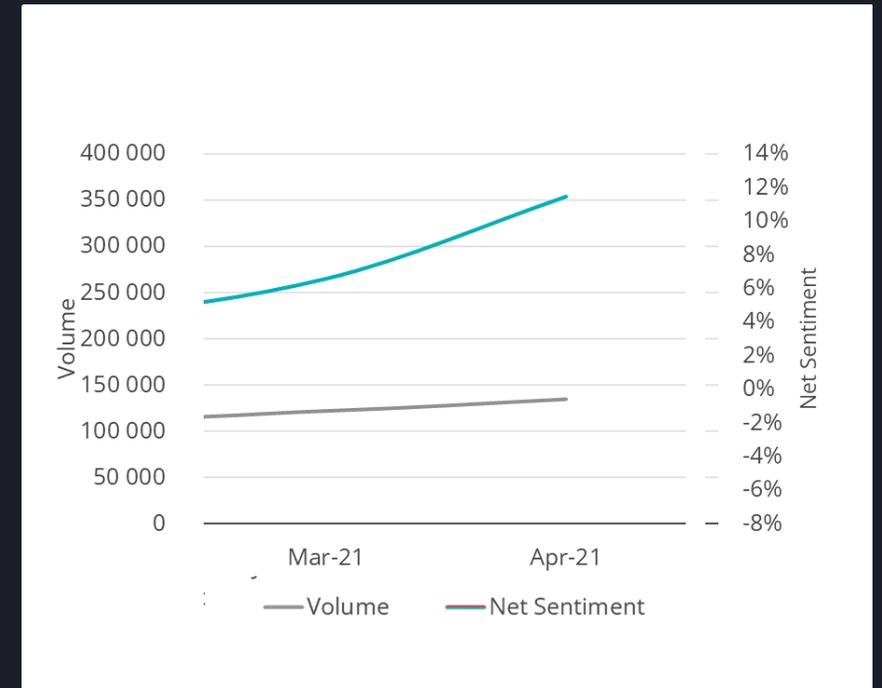
The convictions heightened suspicions towards the retailers, negatively impacting how consumers responded to sales and the general pricing strategies. Fears re-emerged at the start of the 2021 year, with many complaining about the price of ginger and garlic (see example mentions), leading to another probe from the NCC. Retailers need to be aware of the ongoing implications of these allegations especially during sales and promotions as consumers are particularly mistrustful of prices.



# Easter

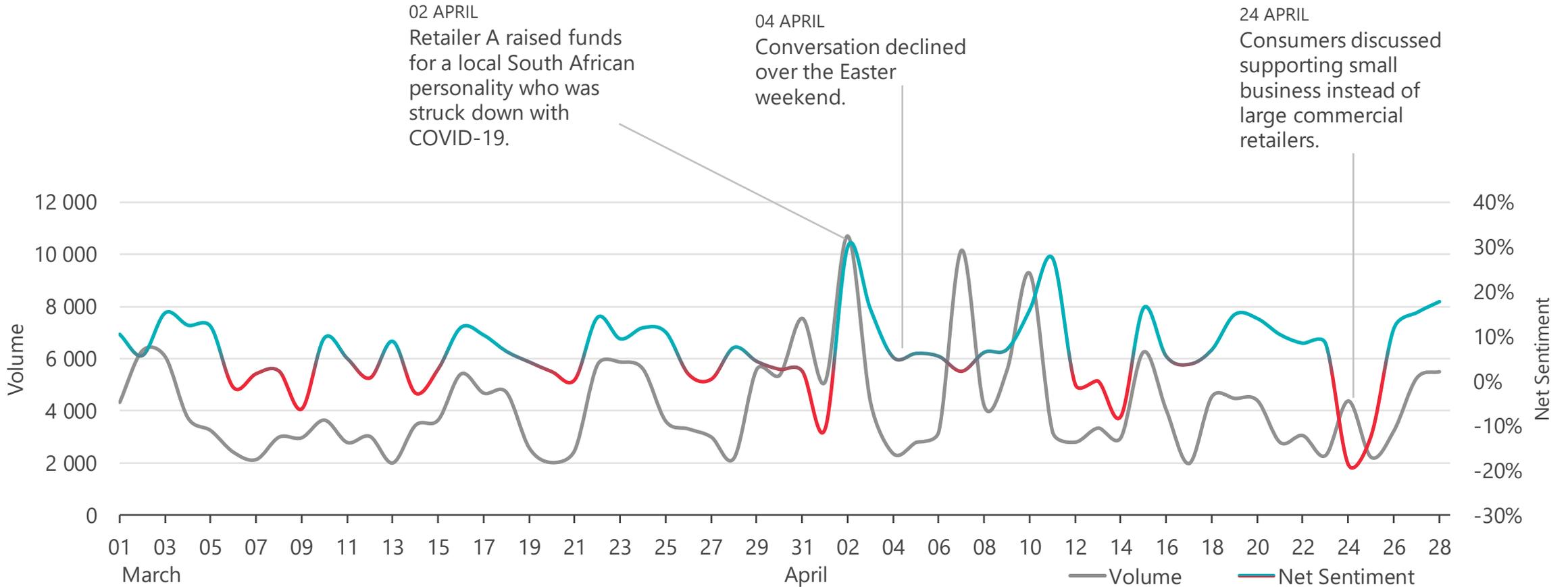
## March- April 2021

Sentiment increase as volumes ease and retailers focus on customer feedback and improvements in online experiences.



# Trends in conversation

Industry volume and Net Sentiment plotted over time



# Key findings over March – April



## Marketing performance

After a decline in conversation and Net Sentiment towards special offers since Black Friday, consumers re-engaged with sales and promotions enthusiastically over April.



## Retail divisions

Consumers were interested in perishable goods over March-April when compared to other periods. Cold chain management was a distinguishing factor between retailers.



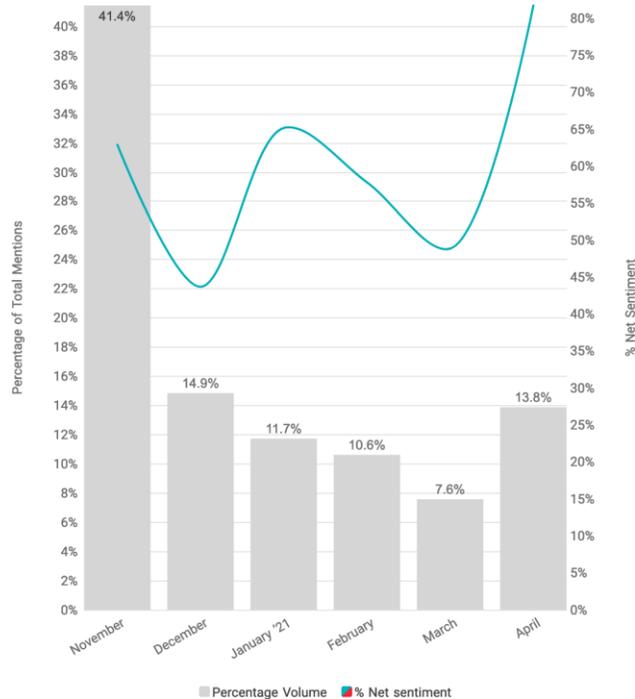
## Customer service

The overall volume of operational conversation over this period was also considerably less than the previous periods (Nov – Feb), indicating less pressure on logistics and operations for the retailers.



# Positive engagement with special offers peaked again over April indicating a renewed interest in sales

Volume and Net Sentiment for special offers



Following a decline in conversation since Black Friday, consumers began to engage more with special offers over April

Consumers were increasingly engaged with content around special offers over April, the month of Easter.

Retailer A and H saw the highest positive sentiment overall over April, and the highest share of voice for special offers with 17.6% and 35.4% respectively.

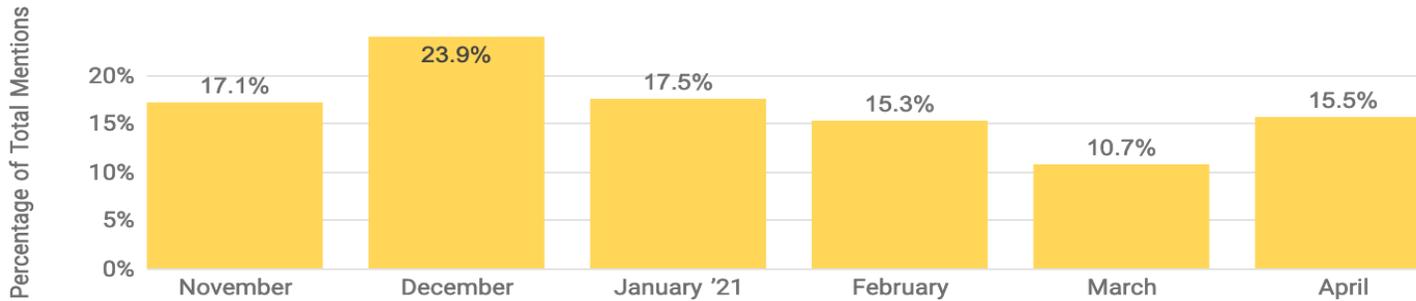
Net Sentiment of retailers over April

Retailer	Net Sentiment
Retailer A	23.5%
Retailer F	3.3%
Retailer C	6.8%
Retailer B	11.3%
Retailer D	-10.0%
Retailer H	44.7%
Retailer G	2.8%
Retailer E	-0.9%
Retailer I	2.6%



# Consumers were most interested in perishable goods over March – April period

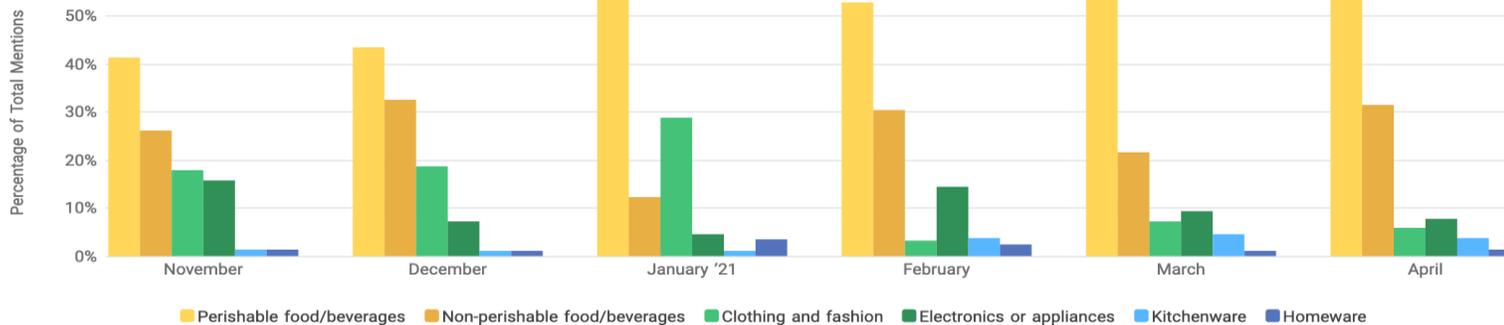
Volume of topic: Comparing brands over time



Retail divisions over time: Perishable foods saw its highest volume over Mar – Apr period.

Perishable goods saw its highest volume of mentions over March and April when compared to the other periods. Looking at these trends, retailers can consider the timing of which retail division to market.

Volumetric trend analysis on product divisions over time





# Consumers were most interested in perishable goods over March – April period

Grocery retailer’s conversation about perishable goods: Mar-Apr 2021

	Volume	Positive	Negative
Retailer A	58.9%	79.3%	19.4%
Retailer F	8.4%	38.9%	58.3%
Retailer C	10.4%	25.0%	70.2%
Retailer D	10.0%	74.2%	24.2%
Retailer B	12.4%	26.6%	69.7%

## Quality of perishable goods distinguished retailers over this time

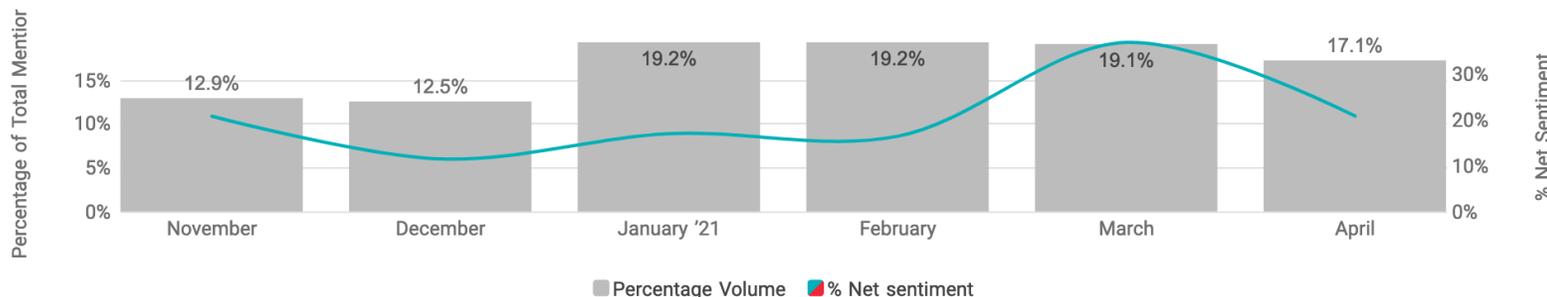
Retailer A saw the highest volume and positive sentiment for its perishable goods, whereas, C and B saw the most scrutiny.

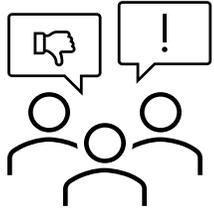
Retailer A was praised for the quality of their products as well as their house brand product ranges. Consumers spoke the most about their cake and ice-cream produce .

Retailer C, and B however, were criticised for allegedly selling expired produce.

This finding highlights the impact of cold chain management and how retailers can lose customer support and loyalty over the freshness and innovation of its perishable goods.

Volume and Net Sentiment towards perishable goods over time





# Customer services improved over the period

Operational and reputational experiences improved over Mar-Apr period

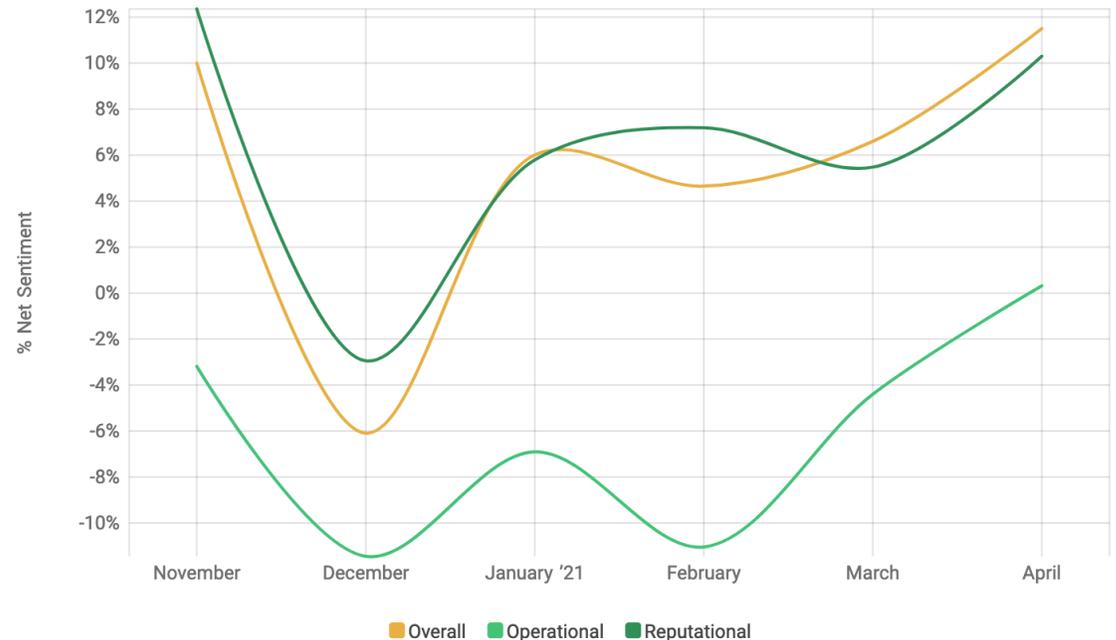
Operational and reputational Net Sentiment increased in Net Sentiment over the March – April period. Operations improved by 5.7 pp and reputation, by 5.8 pp.

The overall volume of conversation over this period was also considerably less than the previous periods (Nov – Feb), indicating less pressure on logistics and operations for the retailers.

## Operational & reputational Net Sentiment\*

	Net Sentiment		
Operational Net Sentiment	-2.4%	<span style="color: red;">■</span>	<span style="color: green;">▲</span> 5.7 pp
Reputational Net Sentiment	12.5%	<span style="color: teal;">■</span>	<span style="color: green;">▲</span> 5.8 pp

## Operational, Reputational, overall Net Sentiment over time



\*comparison dates: January – February 2021

# Glossary

# Glossary of terms 1/2

## Volume and mentions

Volume is the number of mentions. BrandsEye counts each tweet, Facebook post or comment, blog post, or article as an individual mention.

## Opportunities-to-see

Opportunities-to-see (OTS) reflects the number of individuals who would have had the opportunity to see a mention online; it represents the potential exposure of the content. OTS is based on the number of mentions and followers of the contributor(s).

## Engagement

The engagement score consists of the total number of reshares and replies on a post.

## Category

This refers to the type of author a mention comes from—consumer, press, enterprise (brand property, like Twitter handles, Facebook pages, or websites), or directory (classifieds).

## Source

The source of a mention is the domain it comes from. For example, a tweet's source is twitter.com, and an article's source might be iol.co.za.

## Net sentiment

Negative sentiment is subtracted from positive sentiment. This results in a net value. This value is useful as the sentiment at a specific point in time can be understood as a whole value.

## Weighted sentiment

Weighted Net Sentiment is calculated by multiplying Net Sentiment by the total conversation volume. For example, if the conversation volume is 24 839, and Net Sentiment is -3.4%, the weighted Net Sentiment would be -855.

## Customer journey

A consumer's current relationship with the brand. Includes six stages: not a customer, pre-customer, new customer, current customer, churning customer, and post-customer.

## Channels

Touchpoints through which a consumer can interact with the brand.

## COMPANY OVERVIEW



BrandsEye, the world's most accurate social customer data business, helps large organisations to find and prioritise the most valuable customer interactions. Using a unique blend of AI and human intelligence, BrandsEye filters the noise of unstructured feedback for the conversation that's high risk, high value or requires an urgent response.

Using BrandsEye' Crowd powered prioritisation platform, companies are able to better respond to customers, generate more accurate and actionable CX insights, manage risk, and improve market conduct reporting.

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