

BrandMapp–Silverstone

# The SA Blackout Report

March 2023

How middle-market South Africa (the taxpayers) have been affected, how they are feeling and how they are dealing with power failures and blackouts

# Contents

## **01: Introduction**

Context | Timing | Methodology

## **02: Blackouts: the effect on our lives**

Home life | Personal | Work life | Entrepreneurs

## **03: Media: how have our habits changed?**

Television | Radio | Streaming | Social | EskomSePush

## **04: Resilience: how have we handled it all?**

Solutions | Preparations | Spend

## **05: The future**

Who is at fault? | Solutions | Reactions | Conclusion

**Introduction:**  
Why, when & how | the **context behind the survey**

# The SA Blackout Report: **an introduction**

The cover image for this report was created using an artificial intelligence programme capable of generating original, unique, high-quality images using only text-driven prompts. That is the level of technology currently in play in our world – and it is freely accessible to everyone. Yet here, in South Africa, you'd have to be one of the fortunate few just to guarantee being able to switch on your computer to use the programme in the first place. It is an extraordinary situation in which we find ourselves.

Rolling power blackouts, euphemistically referred to as 'load shedding' has been part of the South African reality since 2007. The damage done is hard to assess and we will all no doubt be appalled in the fulness of time when the macro- and micro-economical statistics are finally published to show just how much damage has been done. But those are stories for someone else to tell.

At WhyFive, we have always been in the business of consumer insight, specifically the needs, perceptions and behaviour of the top 30% of society by household income, i.e. somewhere around 13 million individuals who comprise 100% of the personal tax base. They are the lucky ones, the most resilient segment of society, who are best positioned to be able to 'buy themselves out' of blackouts. If we can get a measure of how they are handling things, it might allow us to plan better, or differently, for the future, and at very least give us insight into the real cost of our energy crisis.

## What's **cooking**?

As you read through this report, bear in mind just how reliant SA society is on electricity. Stats SA tells us that upwards of 65% of our people live in urban or metro areas, making us one of the most urbanised societies in Africa and that brings with it a broad menu of needs and desires.

On one end of the scale, there are requirements around physical survival: staying warm and feeling safe. And, of course, the way in which all South Africans are able to source and prepare meals. According to the last Establishment Survey, 91% of families living in households earning under R10K per month rely on electric stoves and 69% have microwaves. Only 12% have access to gas cookers.

When you look at the mid-market (R10K–R40K household income), electric stove and microwave ownership is around 97% BUT, crucially, gas cookers go up to 21% and 40% respectively. In a nutshell, poorer families rely a LOT more on electricity than the rest. That's 70% of our adult population.

On the other end of the scale is the vital importance of connectivity in a modern world. Where exactly would Wi-Fi access sit on a modern Maslow's Hierarchy of Needs? When we are plunged into darkness, we are also plunged into silence. We can only imagine the psychological effects of this on a society that is constantly traumatised by high levels of anxiety and concern.

# What about the **timing**?

The world we live in today is, to say the least, dynamic: that's one of the major challenges for any research survey campaign. On an individual level, you could well go to bed feeling one way about someone or something, only to wake up in the morning and read a headline that completely changes your mind! Such is the way of the modern world.

All we can do is to be clear then about what may or may not bias respondents to a survey with respect to the timing of a survey. And in this case, it is vital to know that the survey field work for this survey was completed on Friday, 17 February 2023. That was four days **before** the ex-CEO of Eskom (and now whistle-blower!) Andre de Ruyter gave his infamous interview to eTV detailing just how dire the situation is at the state 'power' facility.

As you read the results then, be aware that whatever views are expressed by respondents, it was well before they could be swayed or influenced by any of the startling revelations and accusations made about crime cartels, sabotage, potential political collusion and outright treason against we, the people of South Africa.

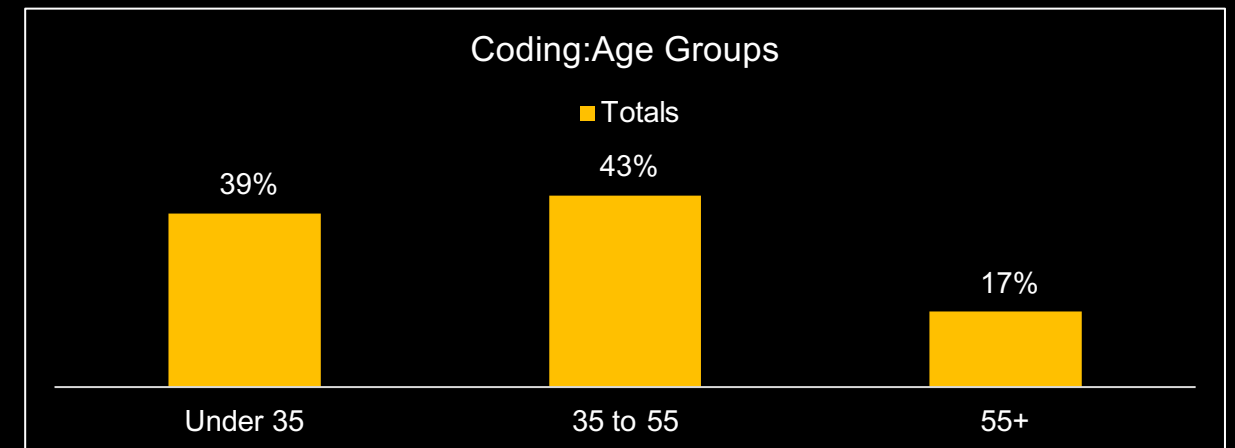
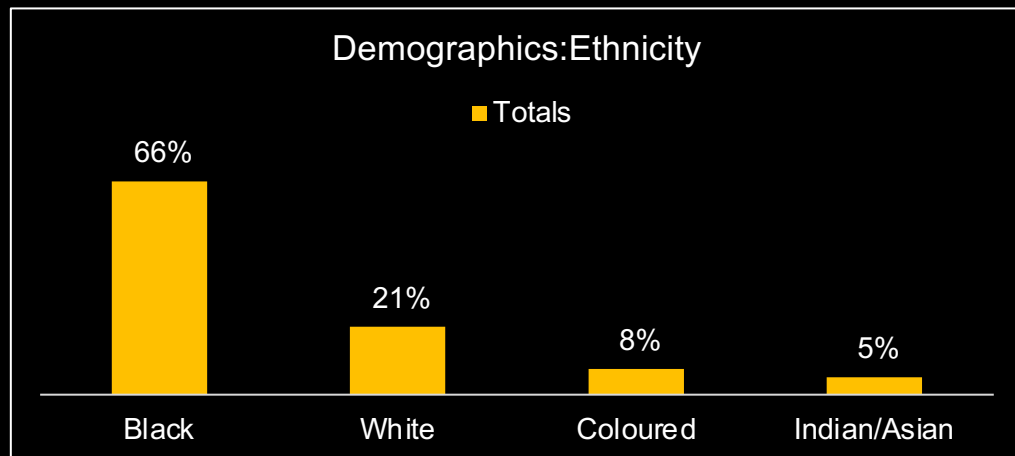
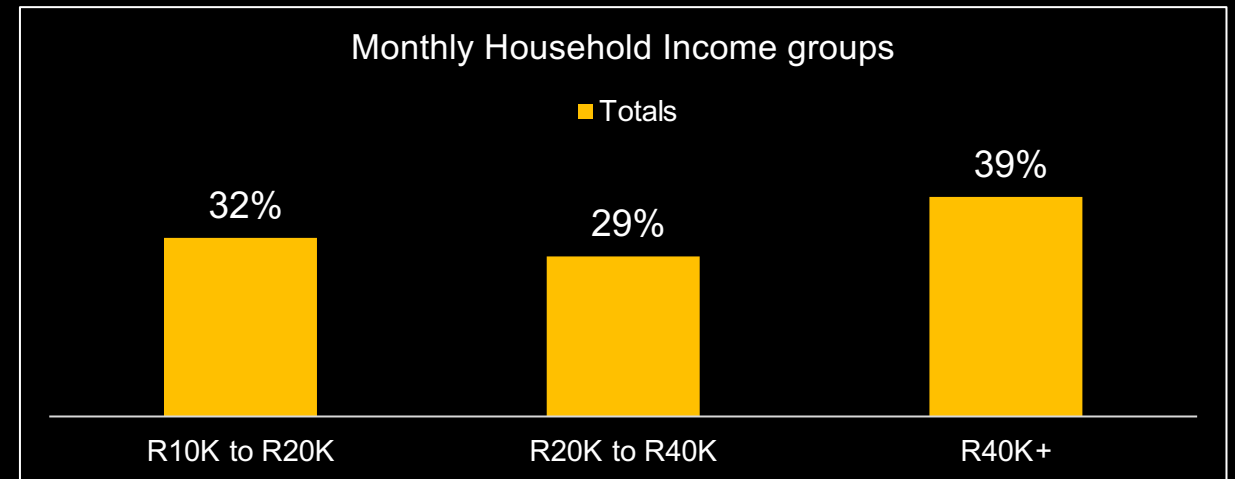
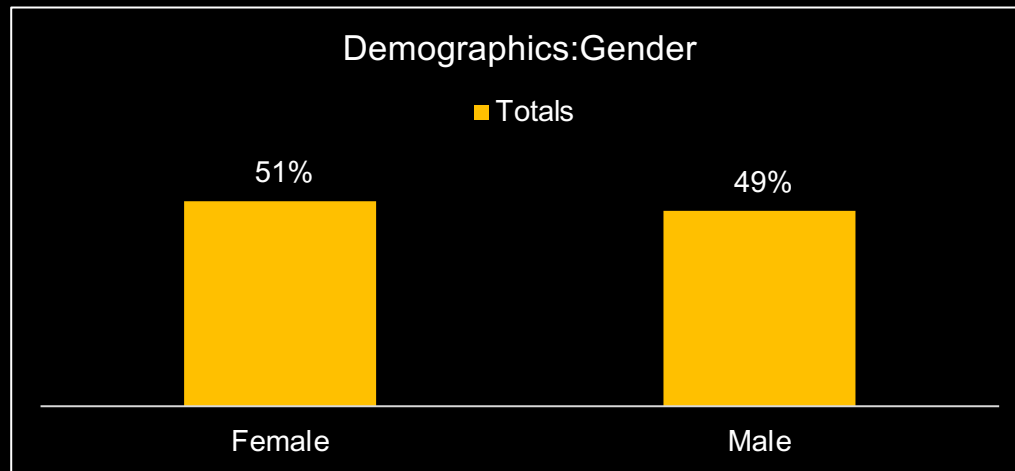
# Methodology & sample representitivity

The SA Blackout Survey was conducted entirely **online** and all participants were invited via email or SMS. All respondents had an equal chance of participating and the only incentive to participate was that of a lucky prize draw. The data collection and survey design was facilitated by Silverstone CIS through its Flashpanel portal.

Respondents living in households earning less than R10K per month were eliminated, making the possible audience (i.e. the representative universe) the mid-market+ online population only. In line with the framework applied to BrandMapp, and in line with current establishment survey demographics, this is the estimated 13 million SA adults in the top 30% of households by income.

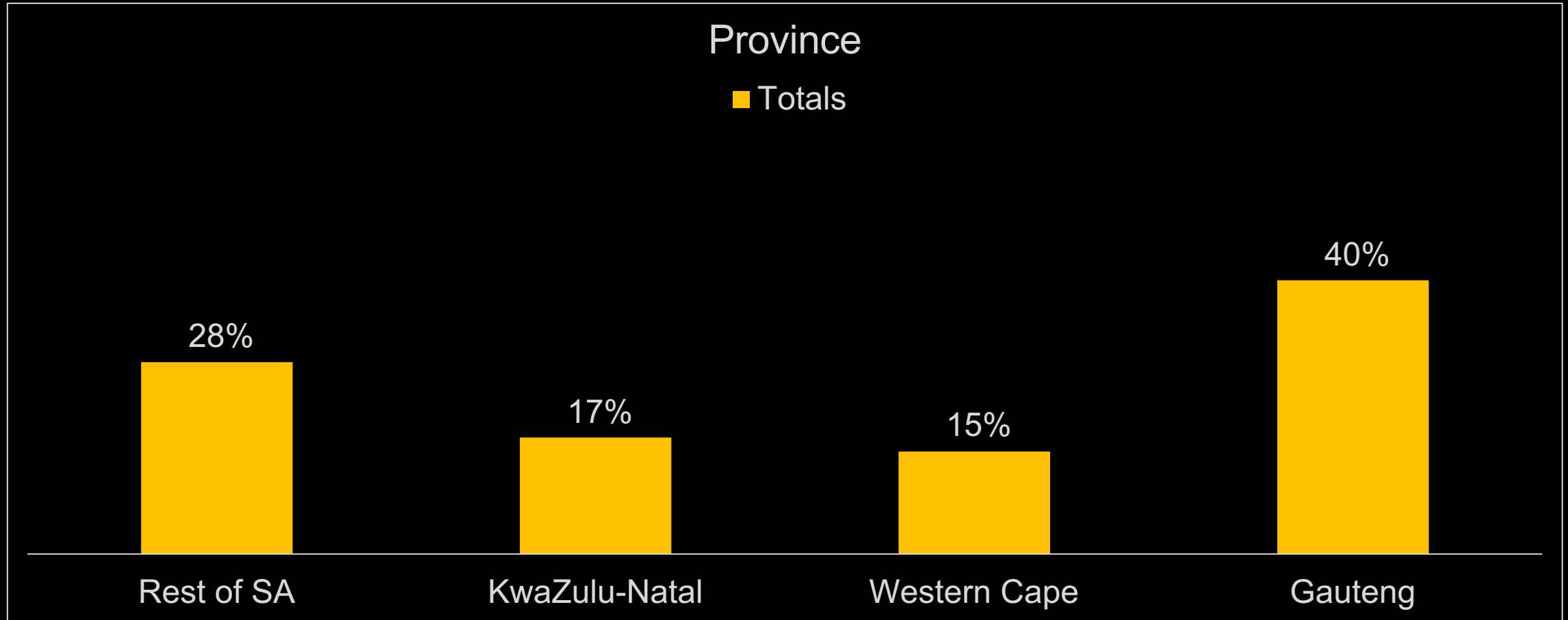
We aimed for a sample of at least 1 000 and **achieved a raw sample of 1 496 respondents**. The data was weighted by SoftCopy to represent the same universe as BrandMapp, i.e. **the online, 18 yrs+ adult population living in households earning R10K+ per month**.

The respondent sample mirrors the annual BrandMapp audience and has been weighted to **represent the demographic profile of adults (18yrs+) living in households earning R10K+ per month.**





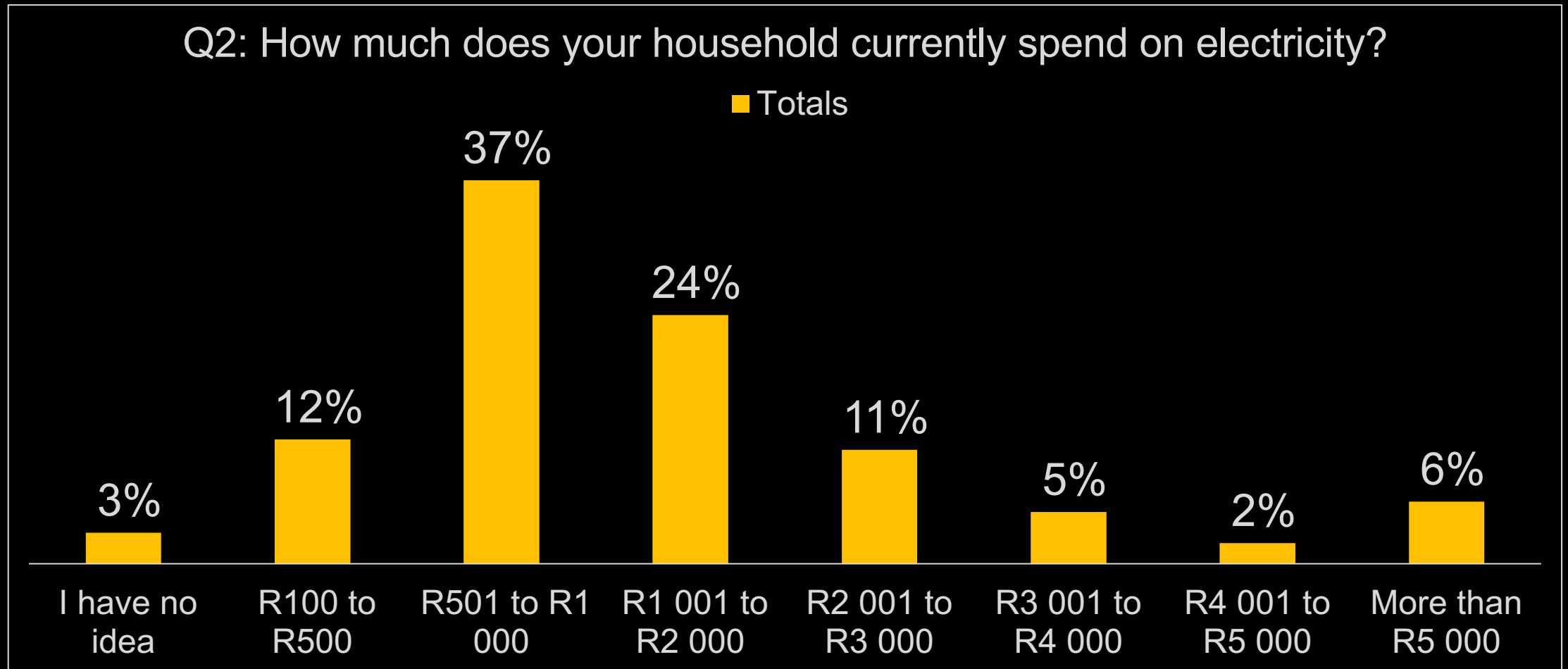
And as with BrandMapp, although the **provincial splits are in line with accepted establishment statistics**, we believe the respondents represent **a slightly metro-skewed audience**.



# 02

**Blackouts:**  
their effect on our lives | at **home & at work**

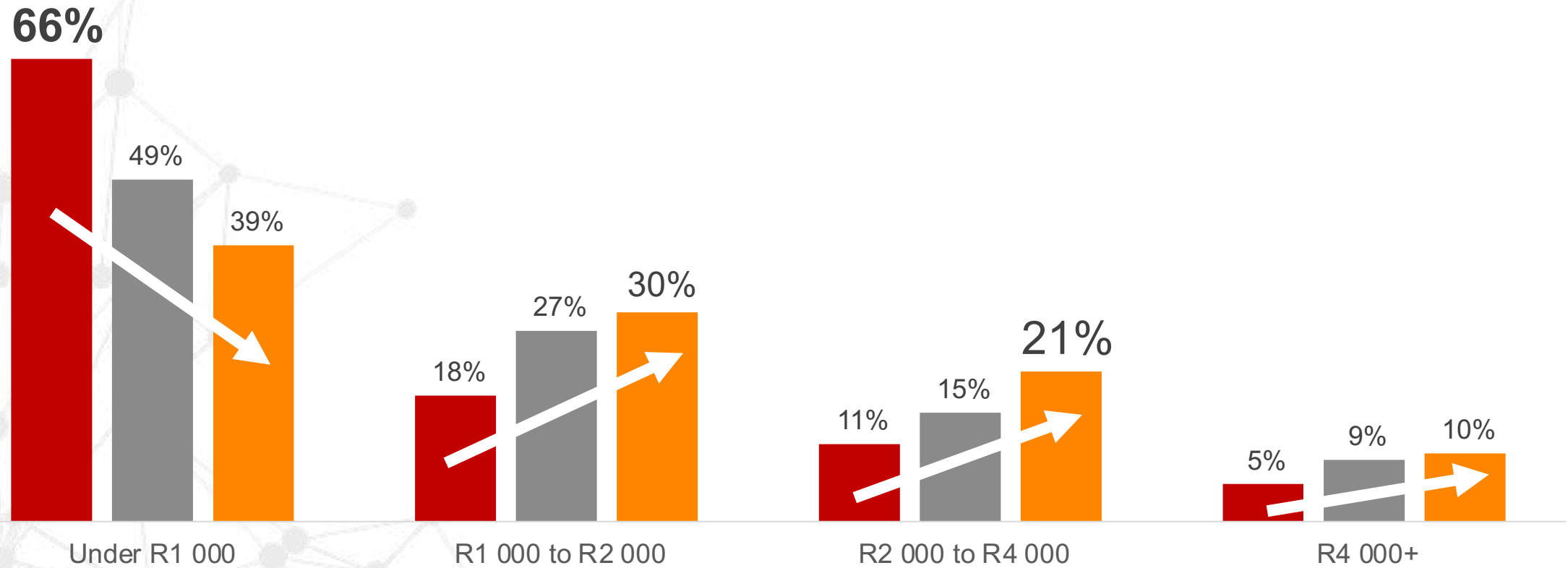
**75% of these respondents pay less than R2 000 per month for electricity.**



# There's a **direct correlation** between income levels and the amount of electricity households purchase.

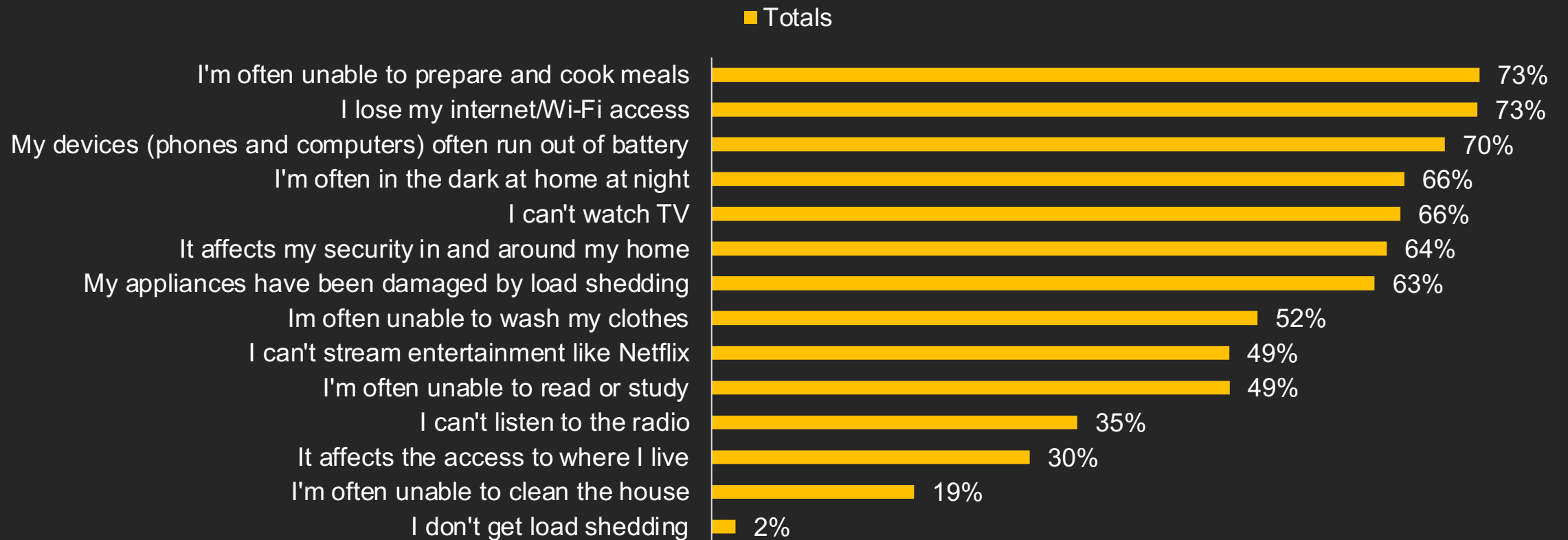
Household income groups by amount spent on electricity each month

■ R10K to R20K ■ R20K to R40K ■ R40K+



The average respondent ticked **7 different things**. We are all heavily affected by blackouts.

Q3 : How does load shedding affect your life at home?



## Just a **thought**...

Going back to one of the challenges mentioned in the introduction, it's all too easy for those living in higher income areas to think that 'everyone's got an inverter', but the reality is clearly quite different for the average taxpaying citizen.

These numbers are staggering because it isn't too far a logical leap to say that if 73% of the mid-market+ population lose their internet/Wi-Fi access during load-shedding, it's fair to say that is the total percentage of adults who have no practical power back-up solution. What they have is a drawer full of band-aids rather than any form of meaningful cure.

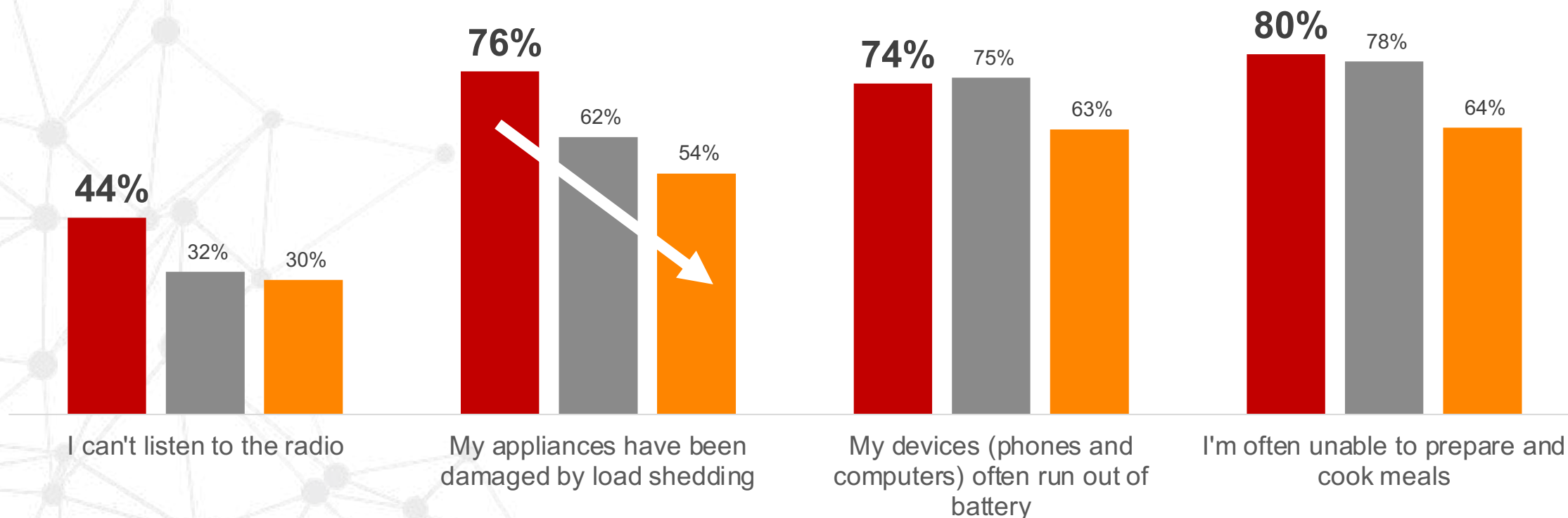
There are two further data points worth focusing on for a second. Firstly, the fact that 64% of people feel less safe at home is nothing short of tragic in a country that already suffered under the reputation of being a global crime capital.

Secondly, the fact that 49% of respondents said they were often unable to read or study. For the latter group, the students, that number goes rocketing all the way up to 80%. Who would have ever imagined that a major threat to the educational levels in South Africa would be the failure of the national power supplier.

# Lower income households have been significantly more affected in terms of physical damage to equipment.

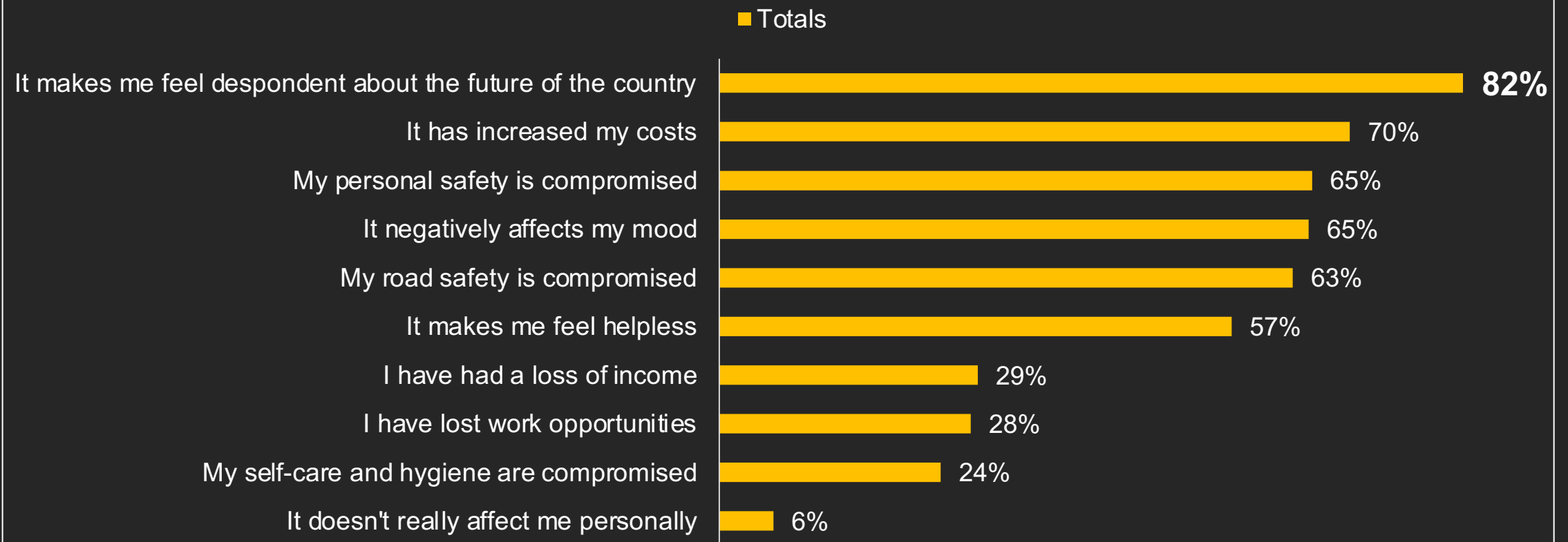
Q3 : How does load shedding affect your life at home?

■ R10K to R20K ■ R20K to R40K ■ R40K+



Perhaps the most devastating effect of load shedding isn't physical, it's **emotional**.  
It's hard to feel proud of **a powerless country**.

Q4 :How does load shedding affect you personally?



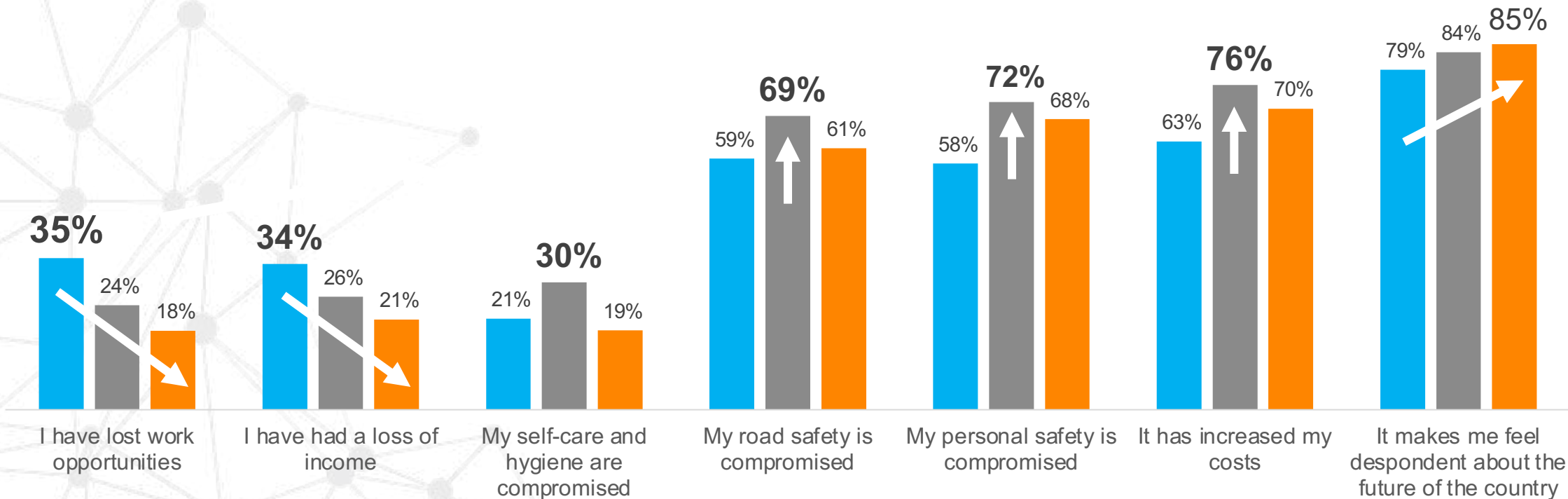


# People at different life stages are affected differently.

Young people have been affected more in terms of work prospects, family people feel less safe and older people are the most likely to feel despondent.

Q4 :How does load shedding affect you personally?

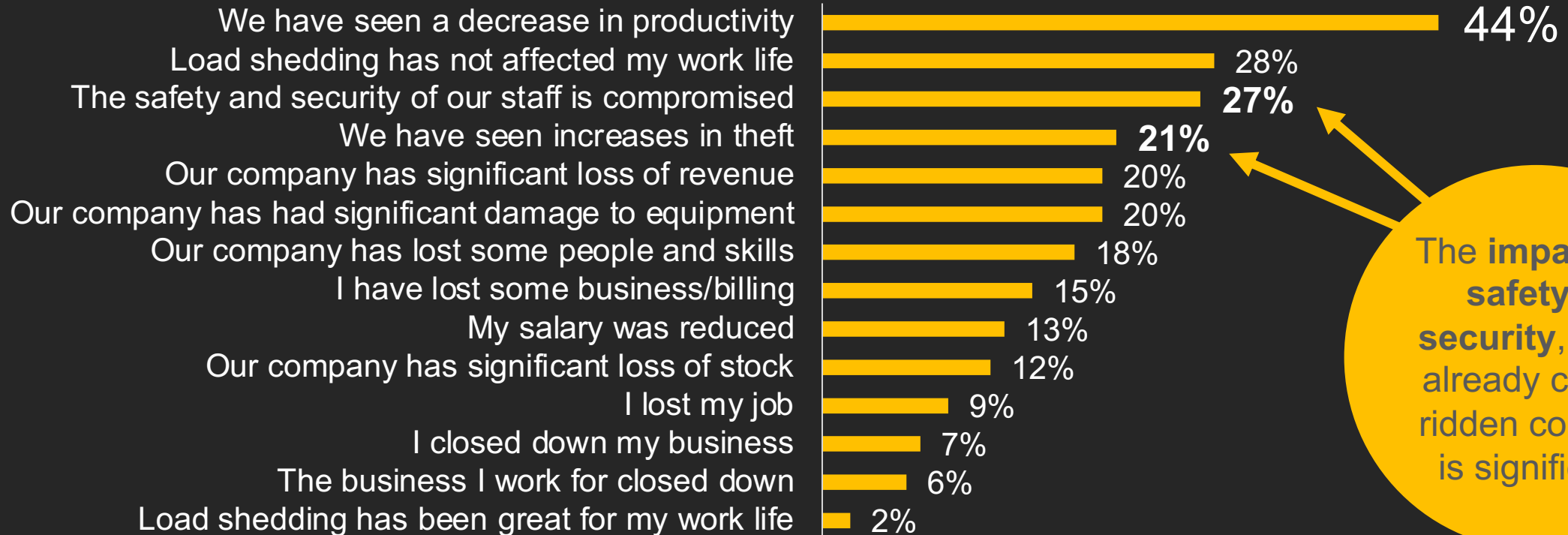
■ Under 35 ■ 35 to 55 ■ 55+



**72% of respondents say that blackouts have affected their work life negatively** and productivity is by some margin the biggest casualty.

### Q9: How has load shedding affected your WORK LIFE?

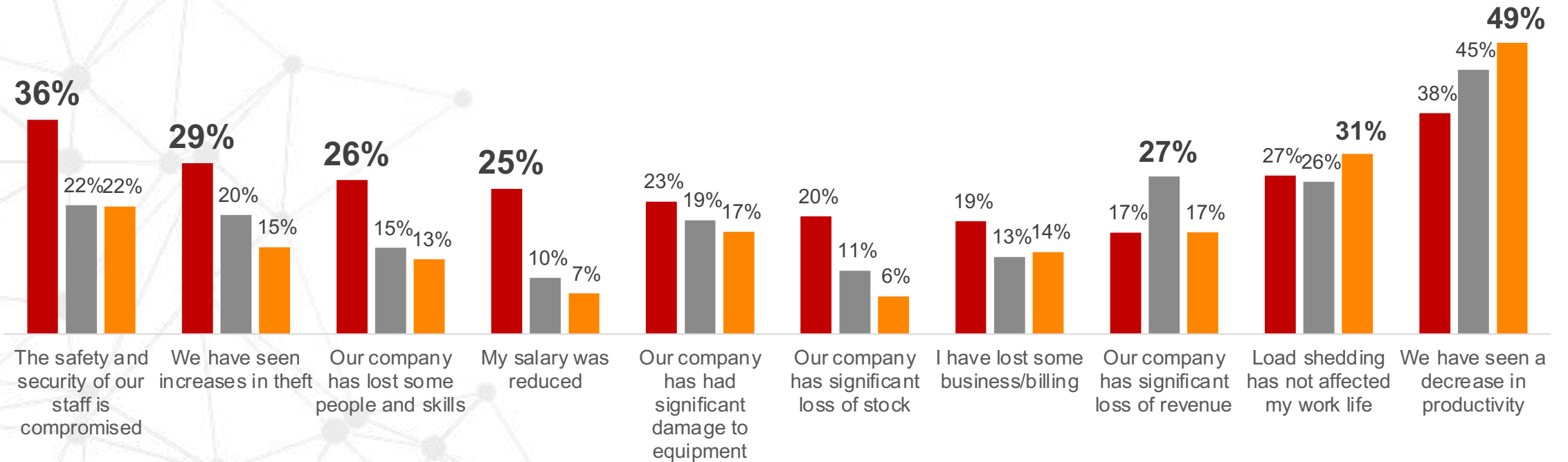
■ Totals



**Lower income consumers** have been significantly more affected in 'practical' ways (jobs, income, etc) where **higher income consumers** are reeling from the **loss in productivity**.

Q9: How has load shedding affected your WORK LIFE?

■ R10K to R20K ■ R20K to R40K ■ R40K+



# A word about **entrepreneurs**

According to the Quarterly Labour Force Survey Q2 2022, 18% of the employed population work in small companies with fewer than 10 employees.

In BrandMapp 2022, we measured 15% of the total employed mid-market-and-up population being self-employed entrepreneurs.

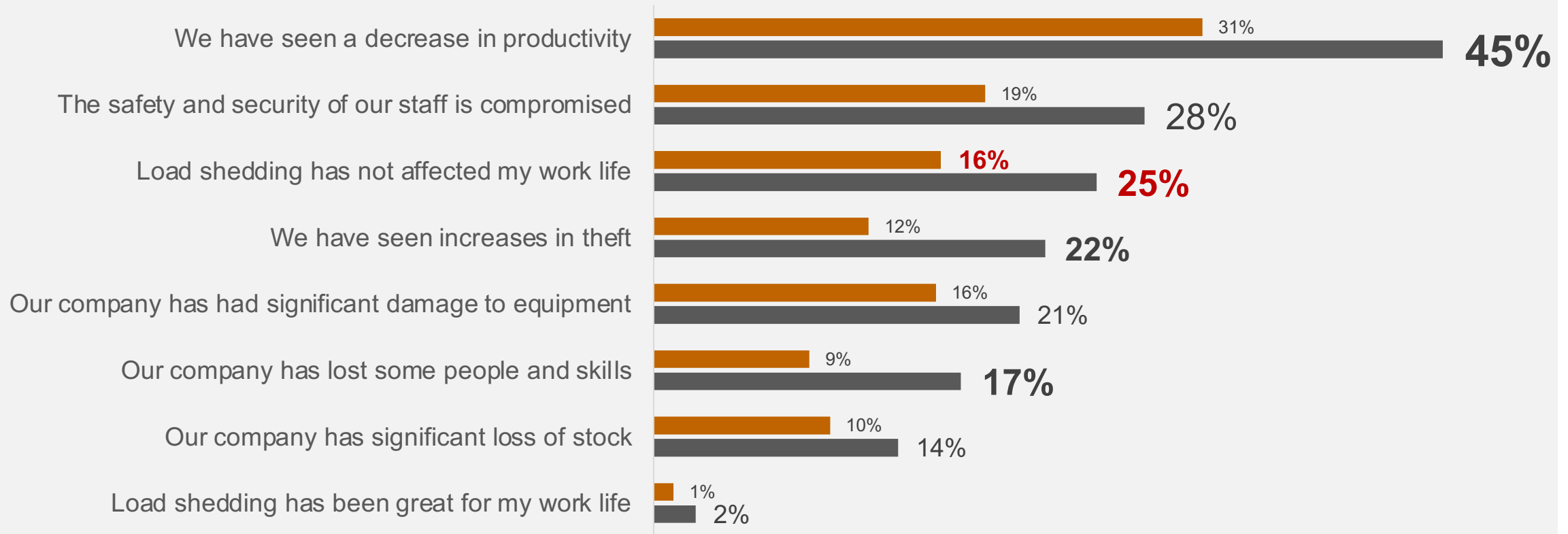
And perhaps most significantly, when asked about their aspiration for the coming year were, 36% of adults under the age of 35 said they'd like to start their own business.

In a country with complex rules and regulations where employment and business ownership are concerned, there's no doubt entrepreneurial activity is going to be a cornerstone of whatever recovery potential we have for the foreseeable future. The risk-takers, sole business people and entrepreneurs are vital to our economic health, so how have they been affected by blackouts compared to the rest of society?

# These are all the things that have **affected employed people more than the self-employed.**

Q9: How has load shedding affected your WORK LIFE?

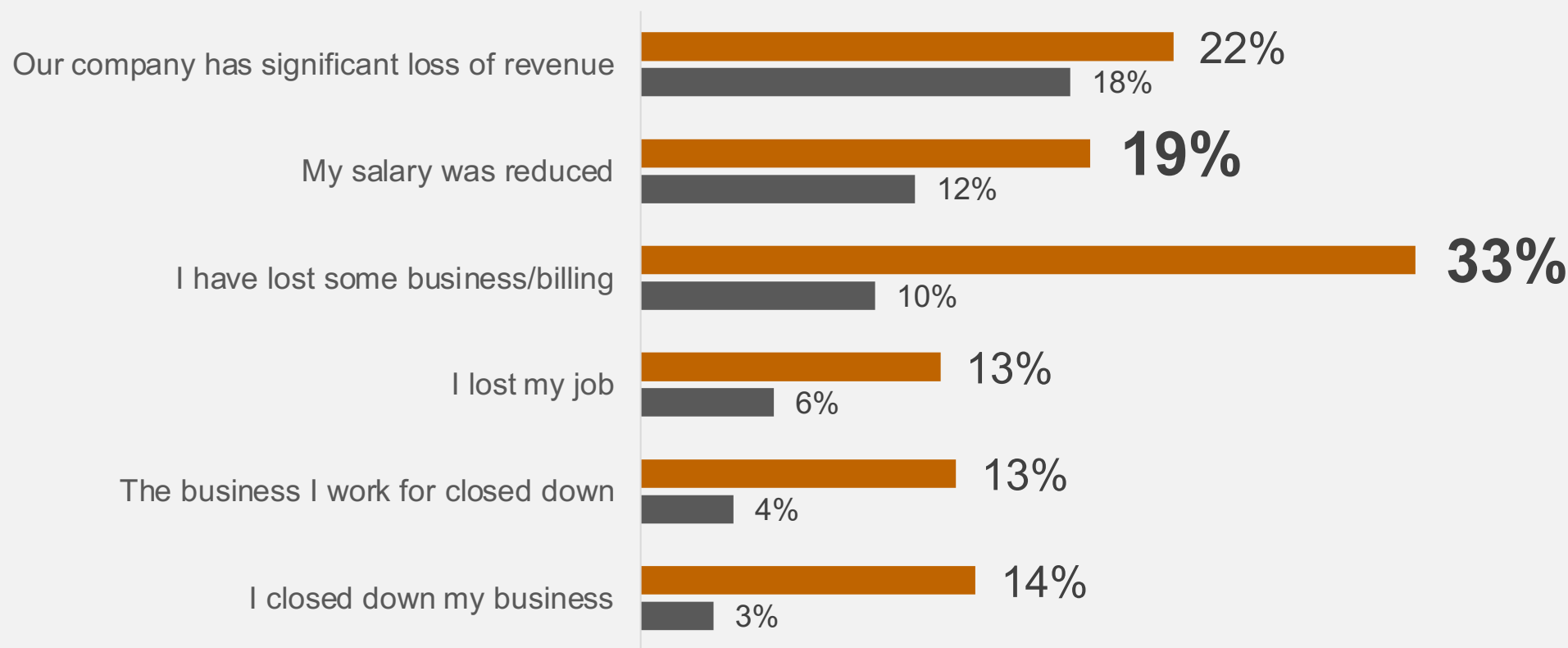
■ Self-employed / entrepreneur ■ Employed full-time



But there are significant material ways in which **entrepreneurs have been extremely adversely affected**, specifically, turnover.

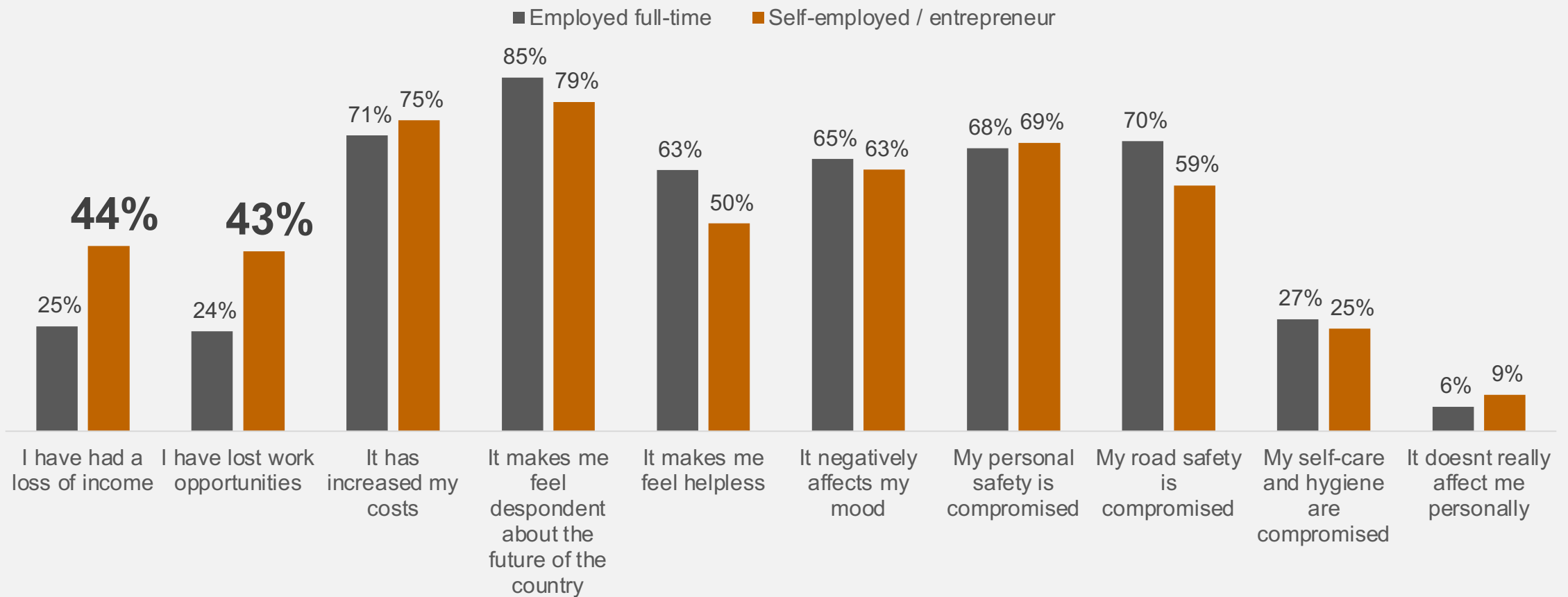
Q9: How has load shedding affected your WORK LIFE?

■ Self-employed / entrepreneur ■ Employed full-time



# Whatever way you look at it, **the SME side of the economy has been hit extremely hard.**

Q4: How does load shedding affect you personally?



# 03

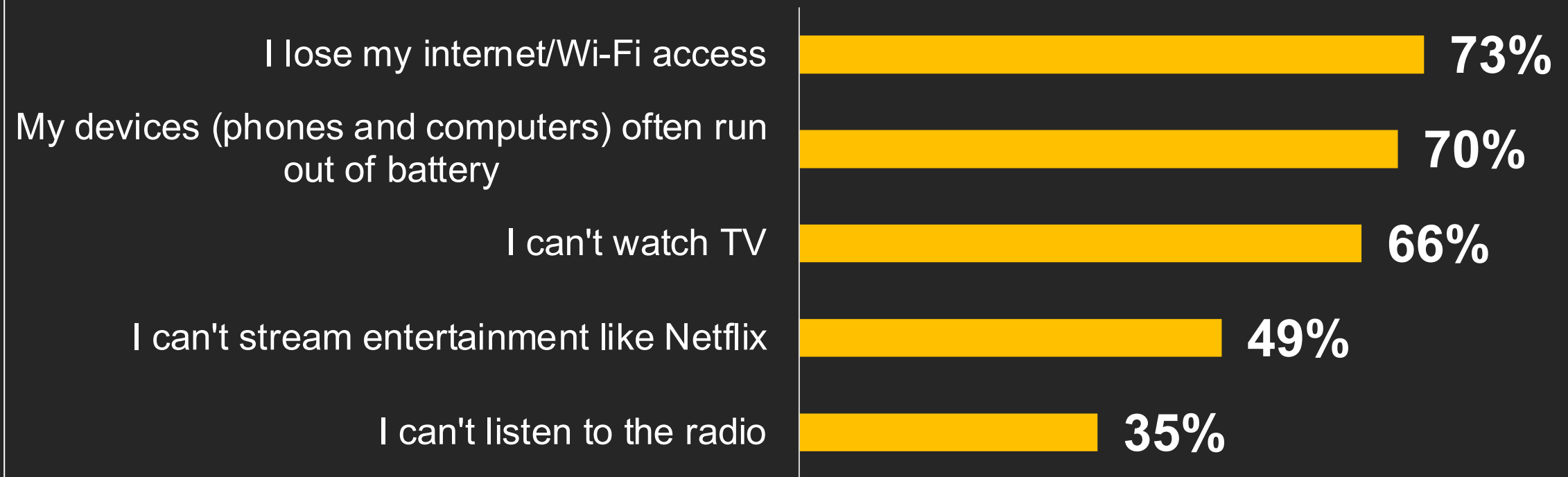
**Media:**  
what has changed? | **TV, radio, streaming et al**



Don't forget what we learnt earlier: modern media platforms all rely on power and that **severely affects our ability to consume media during blackouts.**

Q3: How does load shedding affect your life at home?

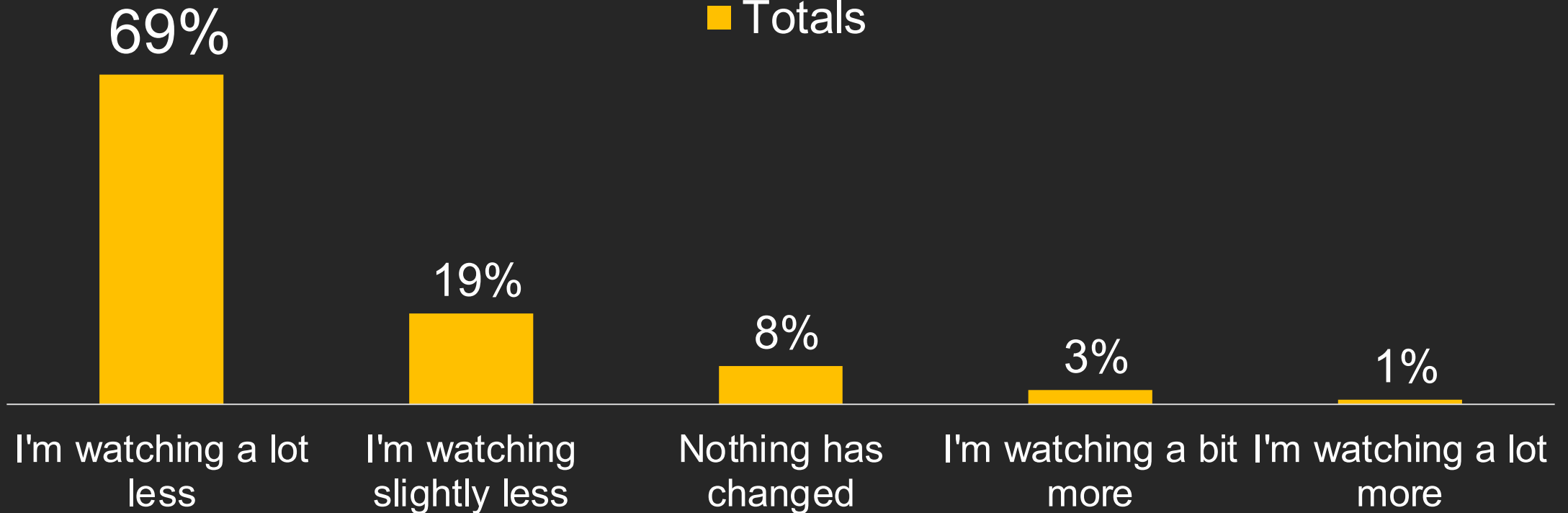
■ Totals



23% of adults don't watch TV during load shedding times; and of those who do, **88% are watching a lot less**. Only **12% say nothing's changed**.

Q5: Which of these statements best describes your TV viewing habits during load shedding?

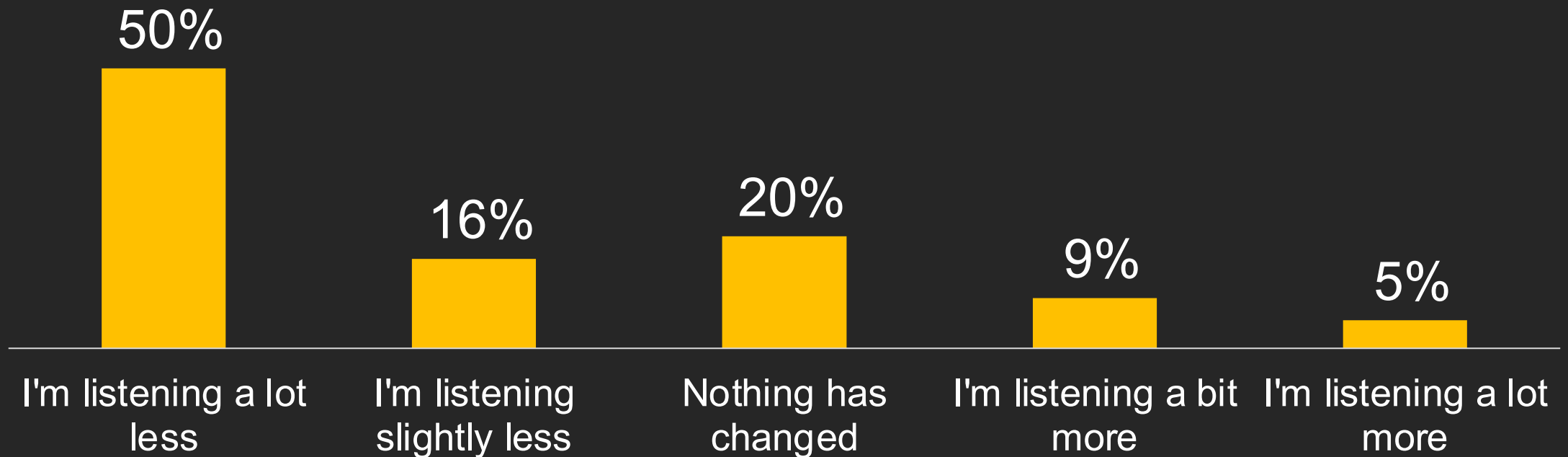
■ Totals



34% of adults don't typically listen to radio during blackouts; and of those who do, **34% haven't been affected.**

Q6: Which of these statements best describes your RADIO listening habits during load shedding?

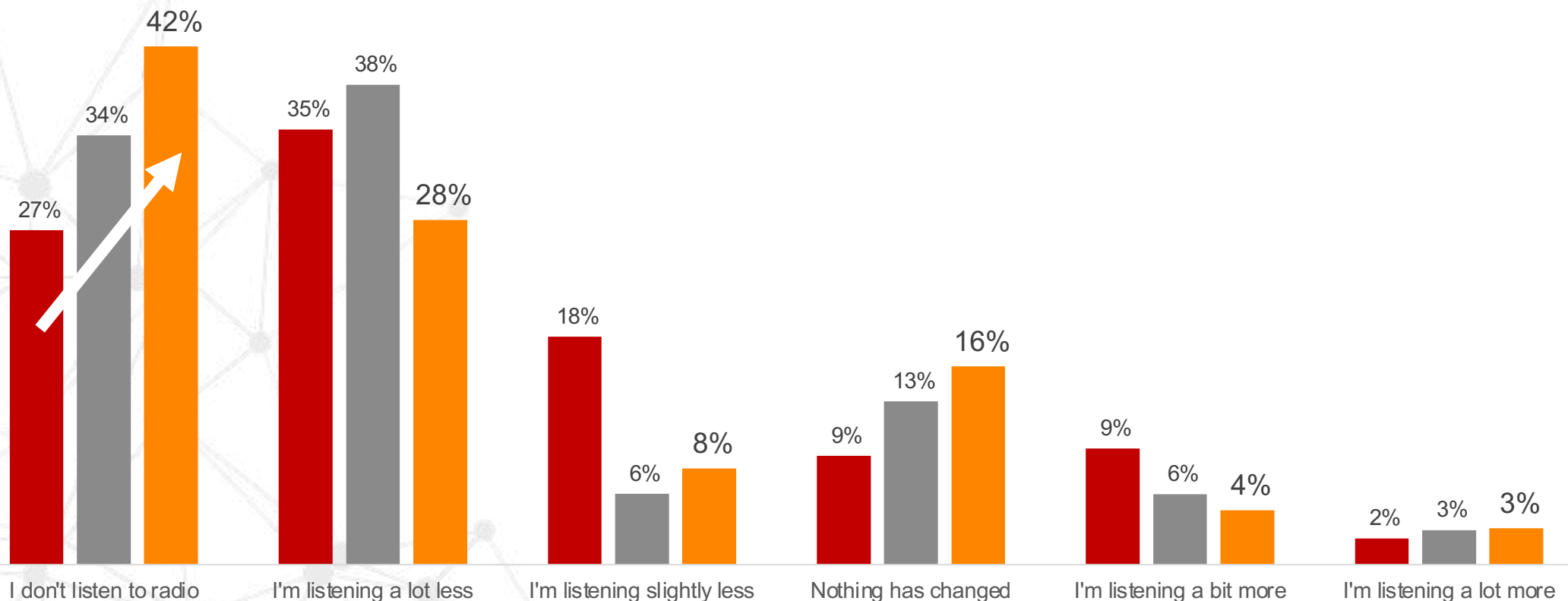
■ Totals



# When it comes to radio, **higher income listeners are significantly less likely to be listening in the first place AND** less likely to be negatively affected.

Q6: Which of these statements best describes your RADIO listening habits during load shedding?

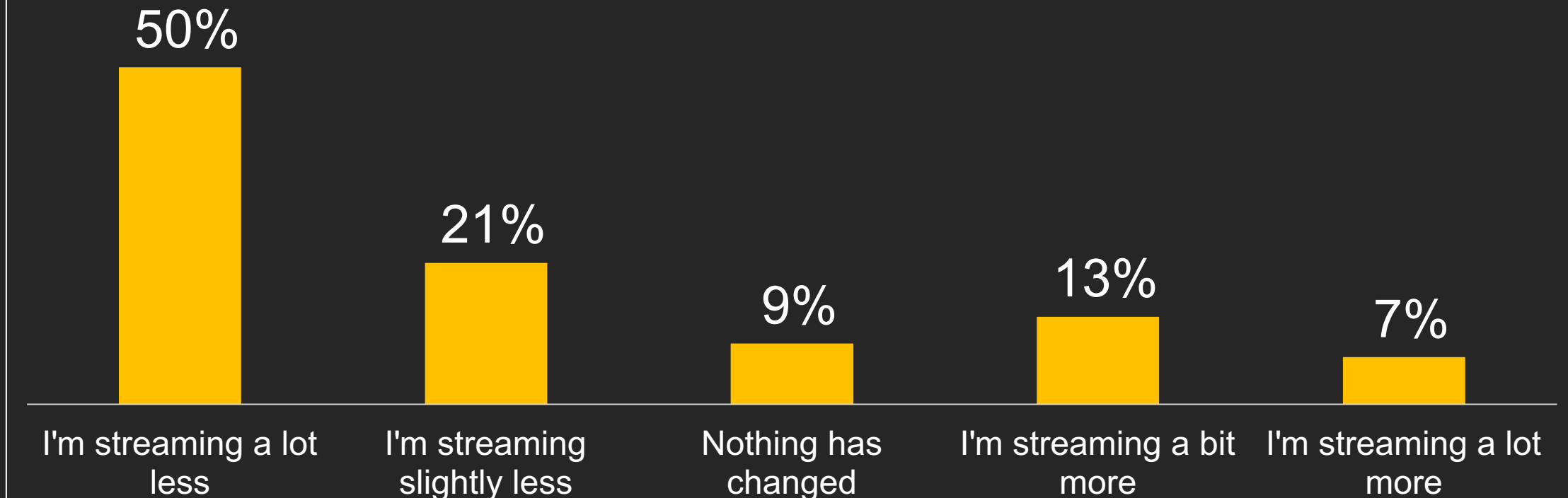
■ R10K to R20K ■ R20K to R40K ■ R40K+



85% of adults stream content during blackout hours; and of them, **29% haven't been affected.**

Q7: Which of these statements best describes the way you consume STREAMING MEDIA (Netflix, Spotify, etc) during load shedding?

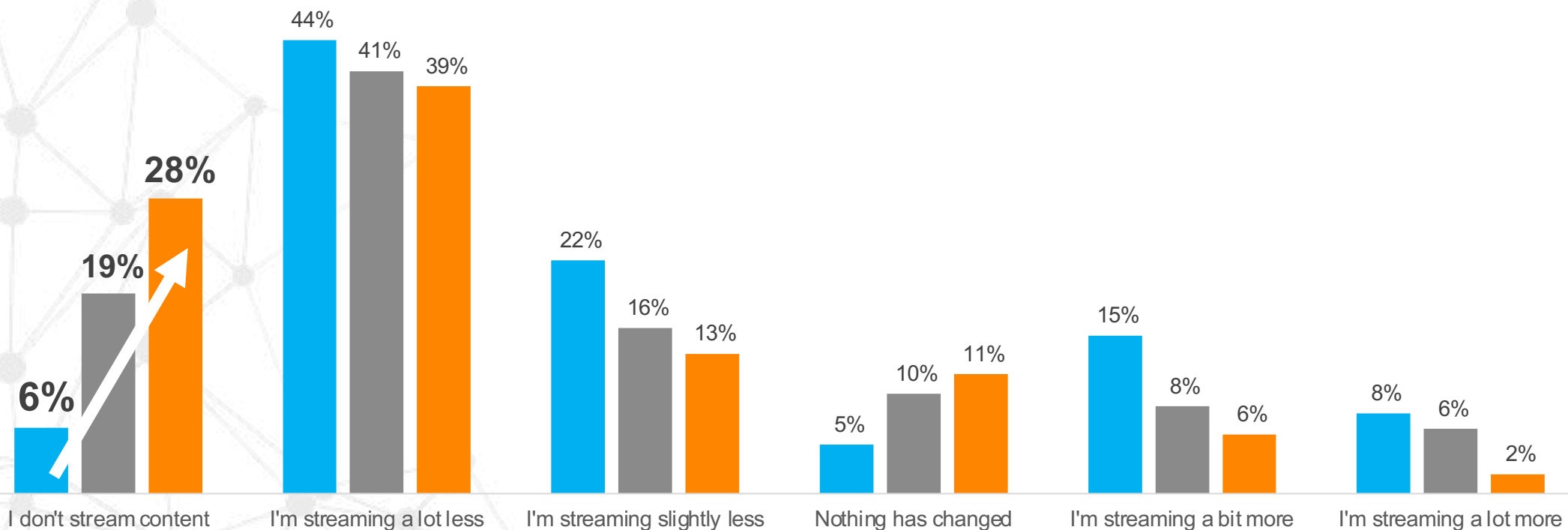
■ Totals



# There are very **big differences in the percentage of age groups** who stream content, so you need to take that into account BUT...

Q7: Which of these statements best describes the way you consume STREAMING MEDIA (Netflix, Spotify, etc) during load shedding?

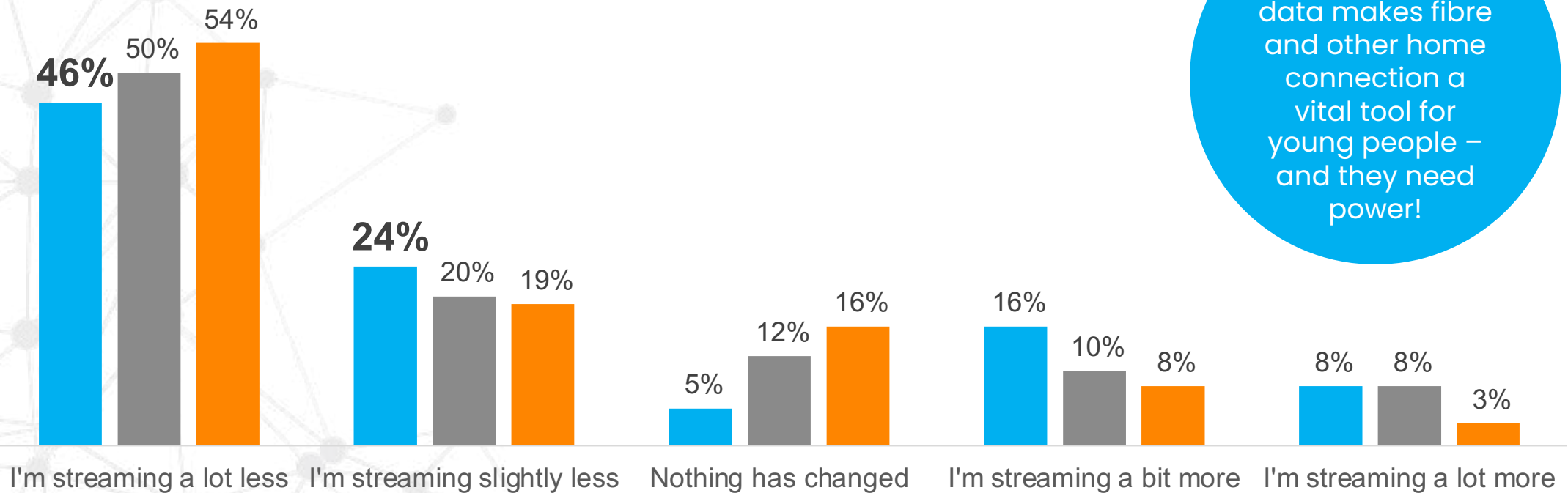
■ Under 35 ■ 35 to 55 ■ 55+



# Of those who do, even **70% of the youngest segment** are streaming less content.

Q7: Which of these statements best describes the way you consume STREAMING MEDIA (Netflix, Spotify, etc) during load shedding?

■ Under 35 ■ 35 to 55 ■ 55+

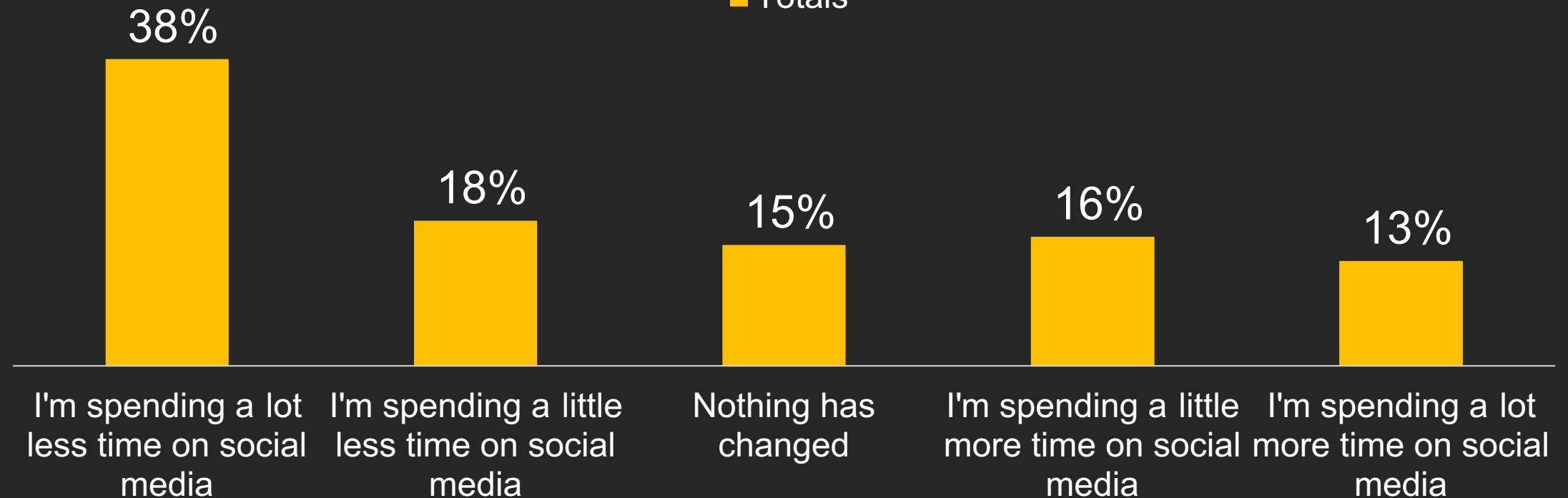


NB: remember that the cost of data makes fibre and other home connection a vital tool for young people – and they need power!

**92% of adults are on social media during blackouts and almost 30% are spending more time than before on social media (probably complaining!)**

Q8: Which of these statements best describes your SOCIAL MEDIA habits during load shedding?

■ Totals

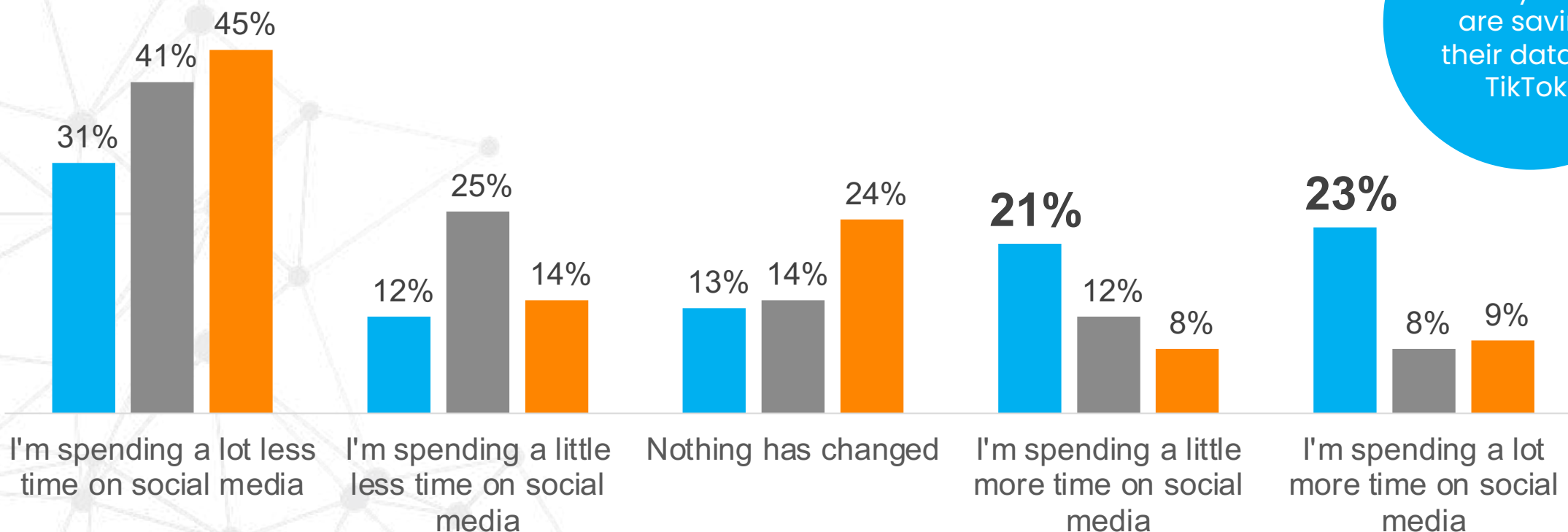




# 44% of younger consumers are spending a LOT more time on social media.

Q8: Which of these statements best describes your SOCIAL MEDIA habits during load shedding?

■ Under 35 ■ 35 to 55 ■ 55+

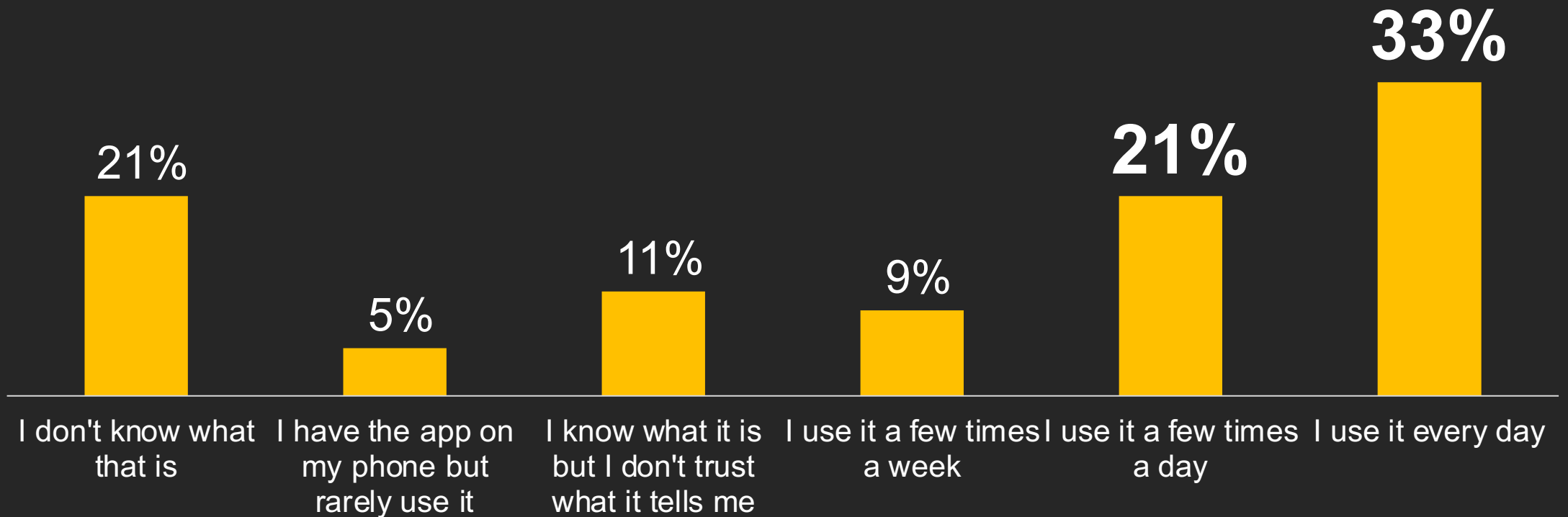


It looks like the youth are saving their data for TikTok!

# These ESP guys **deserve a medal.**

Q14: How often do you use the EskomSePush app?

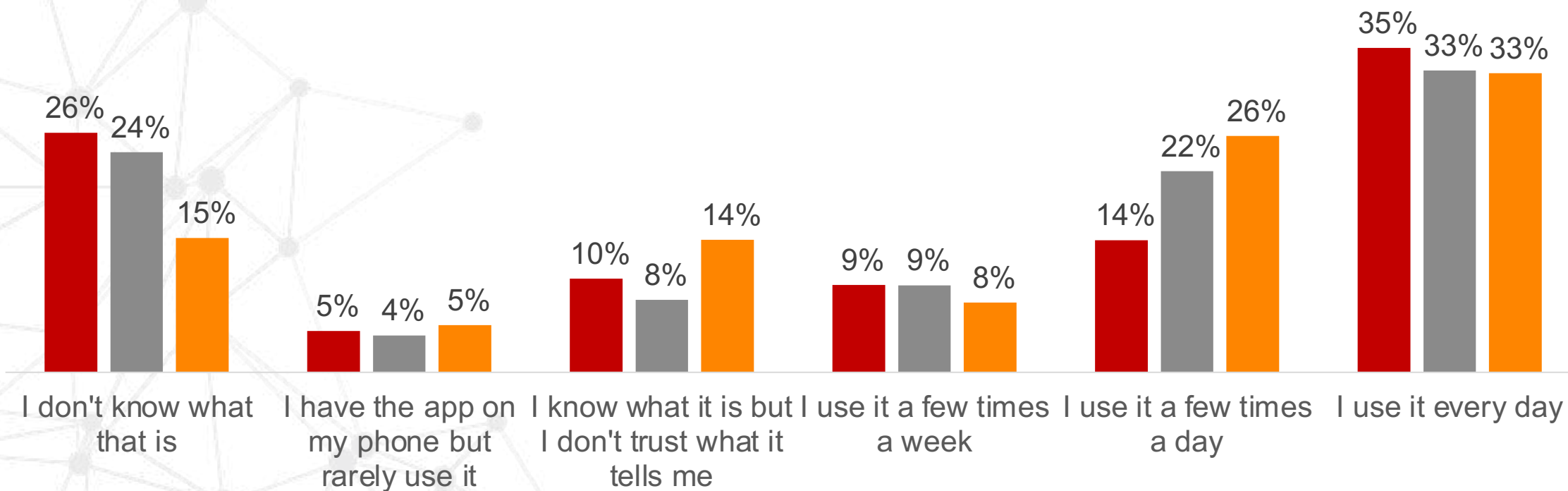
■ Totals



# Lower income consumers are less likely to know about or use Eskom Se Push. They really are in the dark...

Q14: How often do you use the EskomSePush app?

■ R10K to R20K ■ R20K to R40K ■ R40K+



# 04

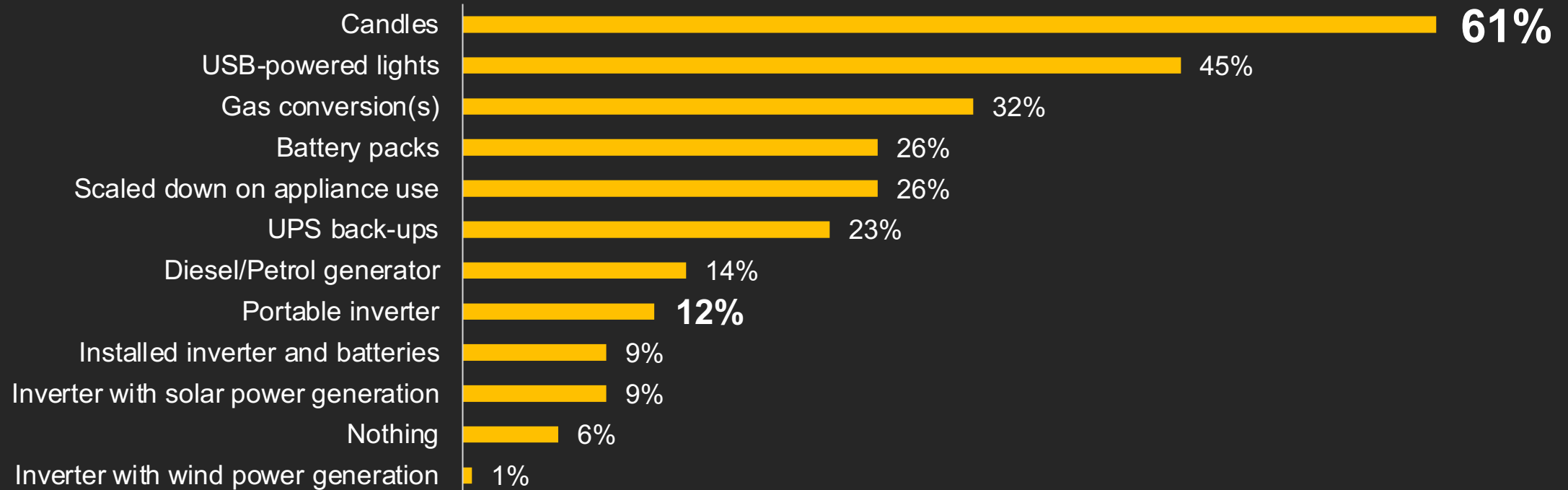
## **Resilience:**

How have people responded? | **What's the plan?**

We've been **forced back 100 years**. When candle power is the best solution, you have to know there's a problem!

Q10: Which of the following things have you bought or used in your household to deal with load shedding?

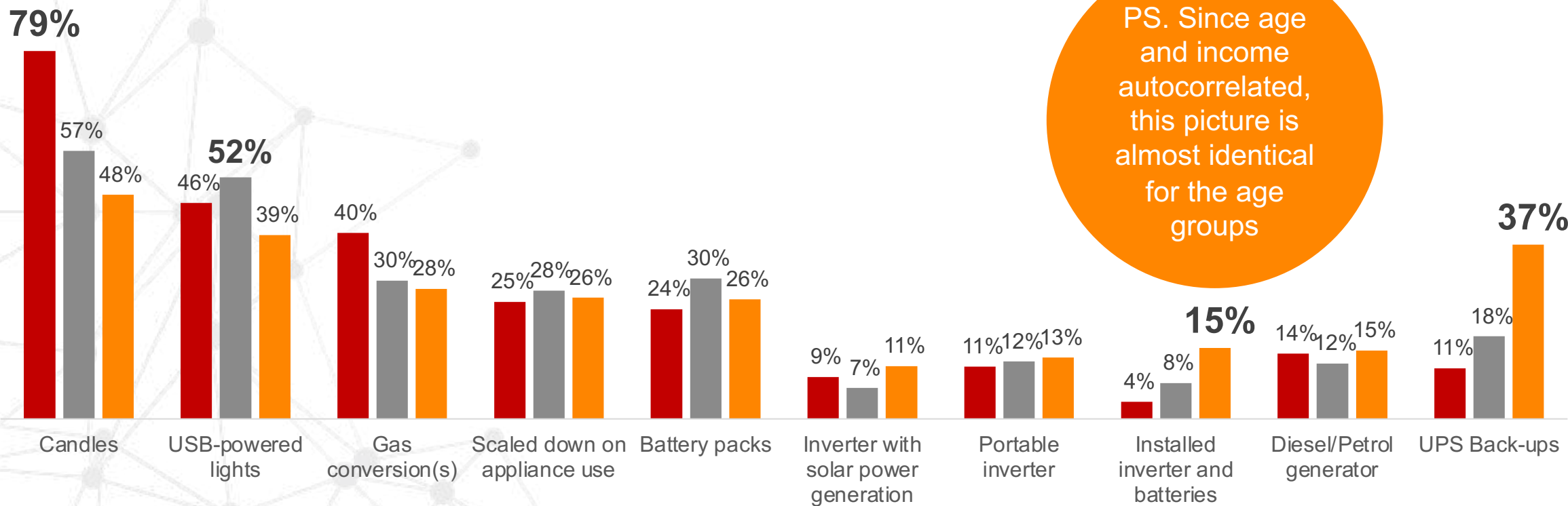
■ Totals



It seems obvious but the data shows **lower income consumers to be more likely to resort to quick fixes** where the wealthier consumers are able to make more substantive moves to combat blackouts.

Q10: Which of the following things have you bought or used in your household to deal with load shedding?

■ R10K to R20K ■ R20K to R40K ■ R40K+

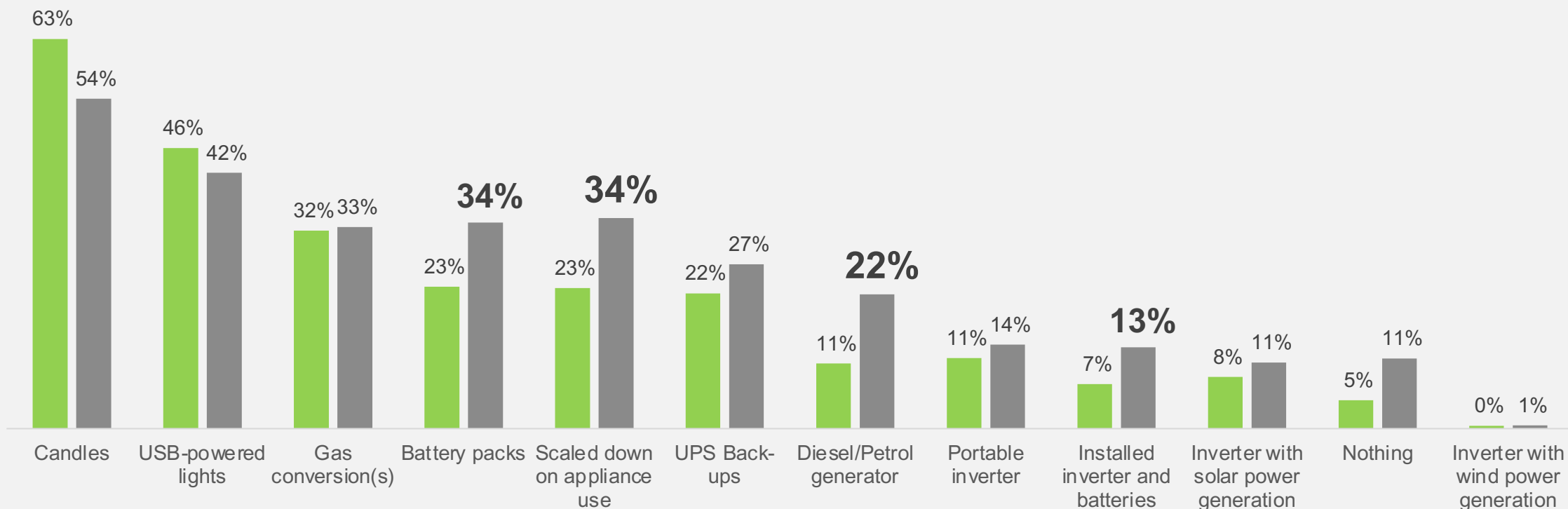


PS. Since age and income autocorrelated, this picture is almost identical for the age groups

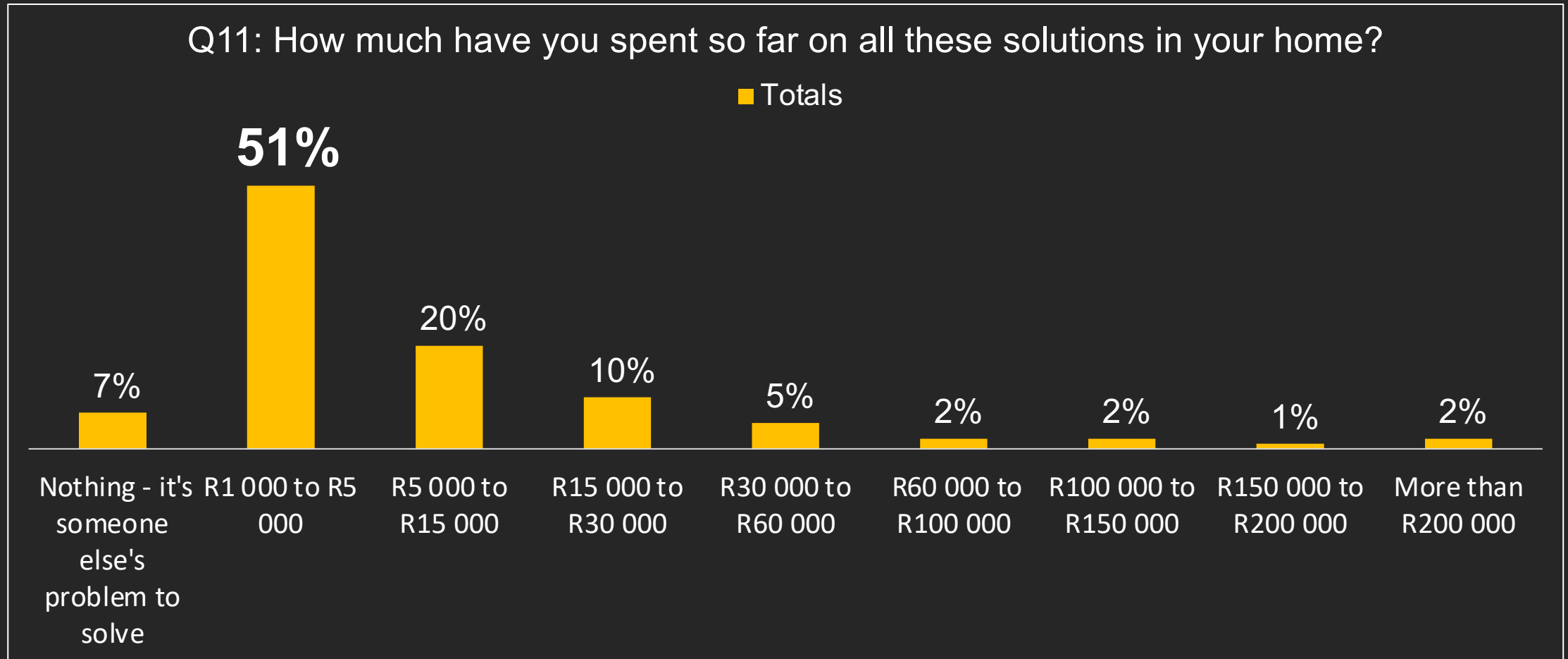
The 25% of **people who spend the most on electricity** are significantly **more likely to be looking to solve the problems:** scaling down alone doesn't cure the problem.

Power outage investments versus household monthly spend on electricity

■ Under R2 000 ■ Over R2 000



# 51% of respondents have **spent less than R5 000** fighting blackouts

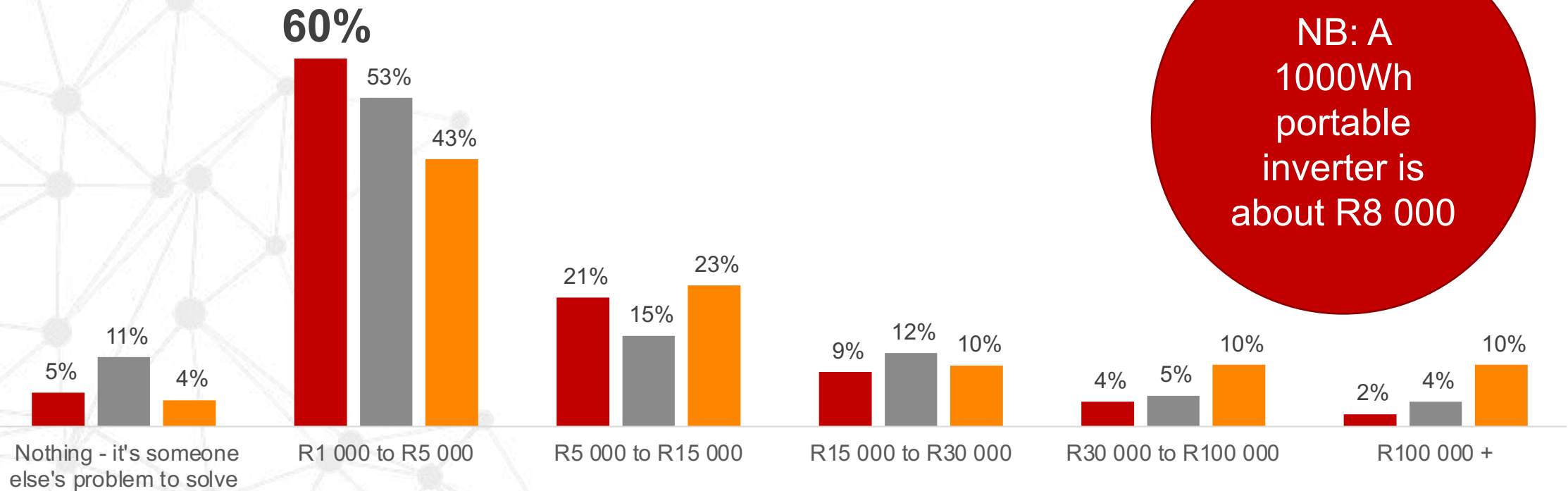




The vast majority of lower income households has not been able to spend more than R5 000 solving the problem unlike **20% of wealthy households** who have been able to throw **more than R30K** at the problem

Q11: How much have you spent so far on all these solutions in your home?

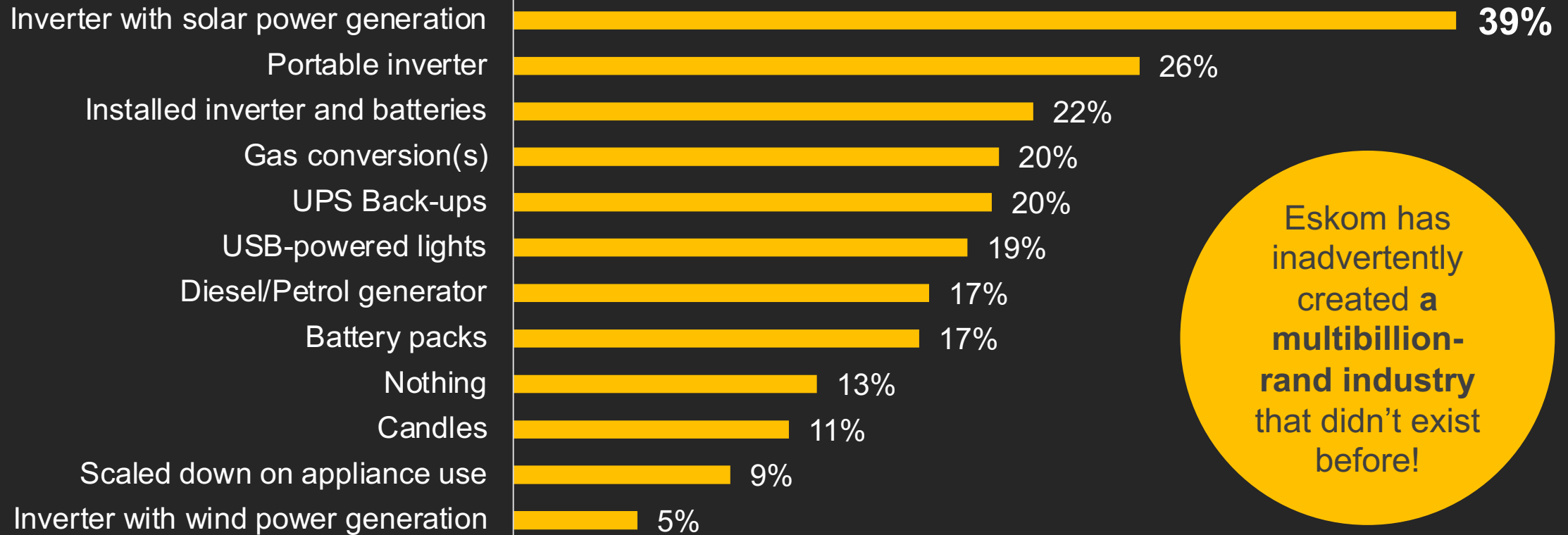
■ R10K to R20K ■ R20K to R40K ■ R40K+



Solar is clearly the solution of choice with **almost 40% of respondents** considering it as a means of survival.

Q12 :Which of the following do you PLAN on doing in the next 12 months to deal with load shedding?

■ Totals

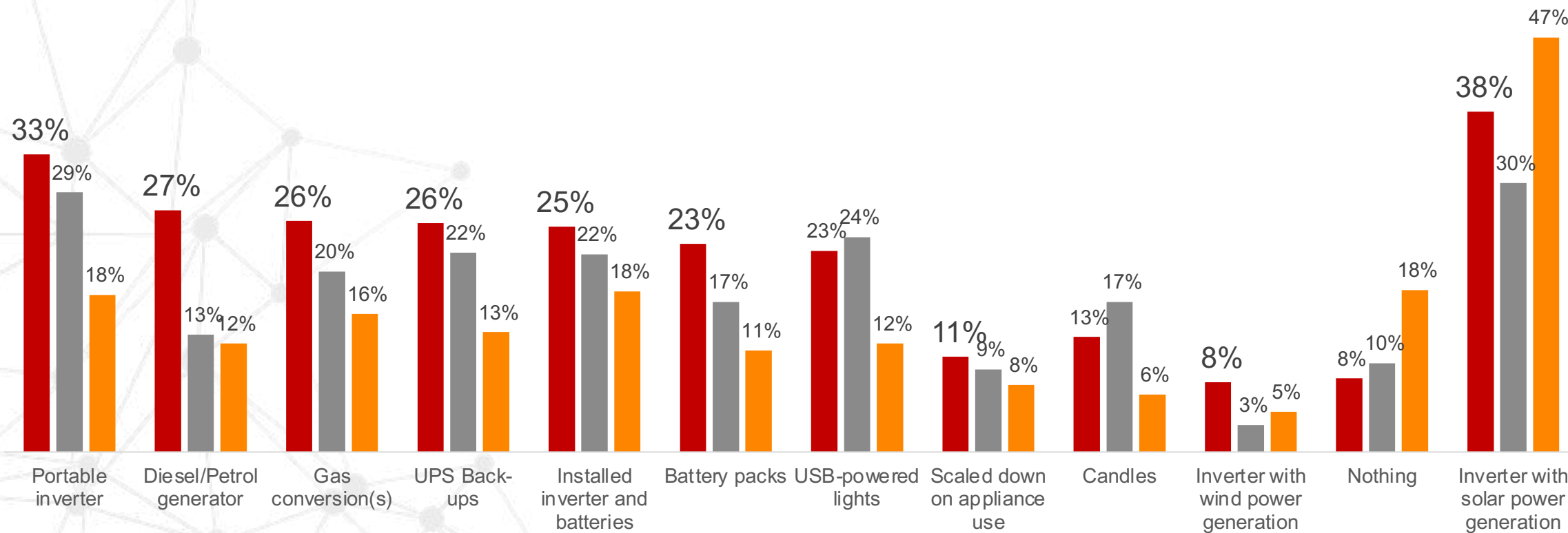


Eskom has inadvertently created a **multibillion-rand industry** that didn't exist before!

Phew – this just shows how **desperate the lower income households are**: they are planning on doing anything possible to ease the pain.

Q12: Which of the following do you PLAN on doing in the next 12 months to deal with load shedding?

■ R10K to R20K ■ R20K to R40K ■ R40K+

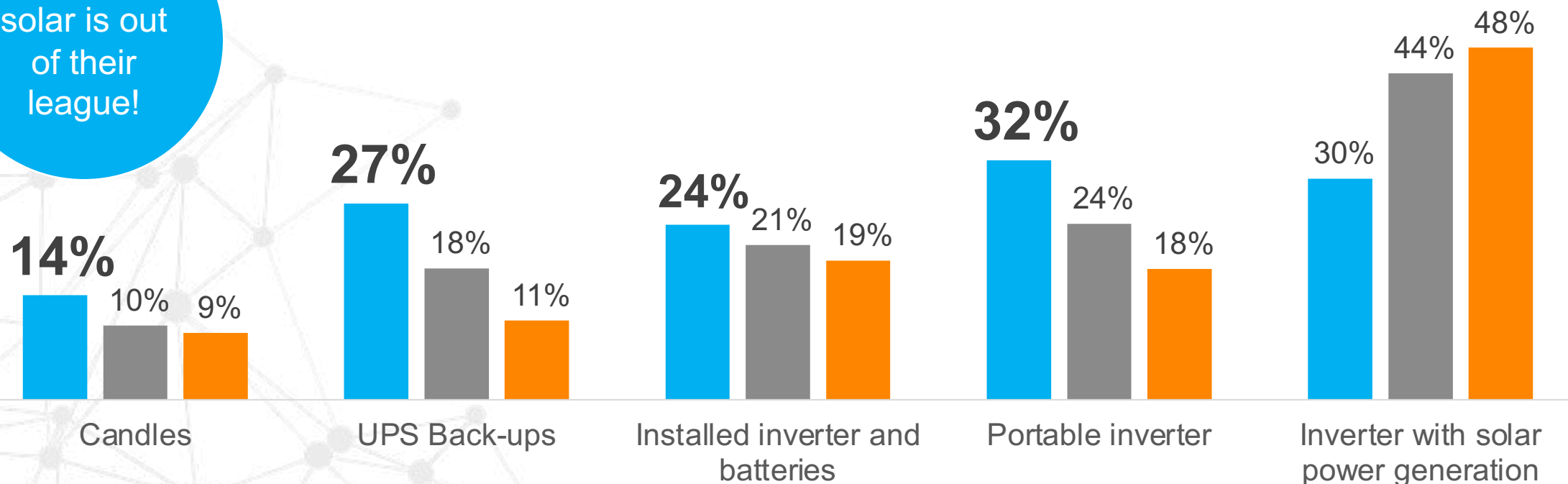


The age skews are interesting because it goes back to the 'tech' issues that **younger people** face: they want to do **anything possible to stay online** and connected!

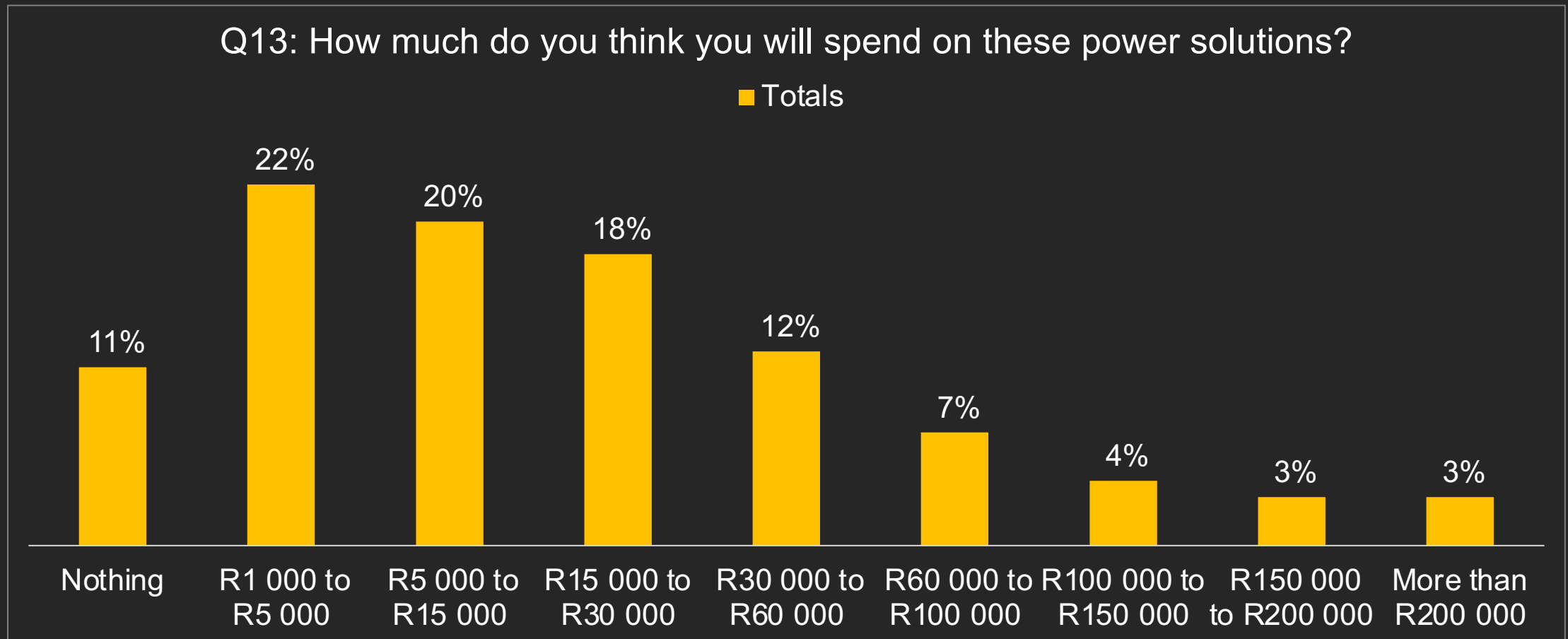
Q12: Which of the following do you PLAN on doing in the next 12 months to deal with load shedding?

■ Under 35 ■ 35 to 55 ■ 55+

They know solar is out of their league!



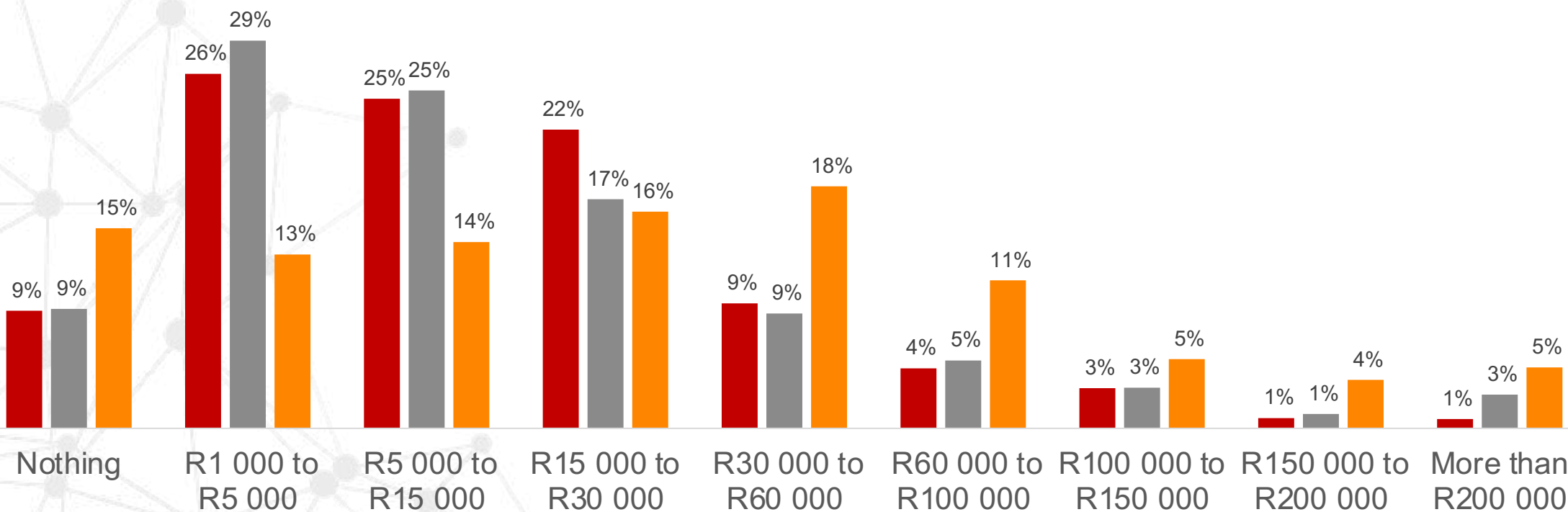
**79% of respondents** are planning to **spend money to fight blackouts** – and about half of them can spend more than R15K doing so.



# 40% of lower income homes are planning on spending in excess of R15K to get through blackouts (43% of the Top Enders (R40K)+ are looking at more than R30K)

Q13: How much do you think you will spend on these power solutions?

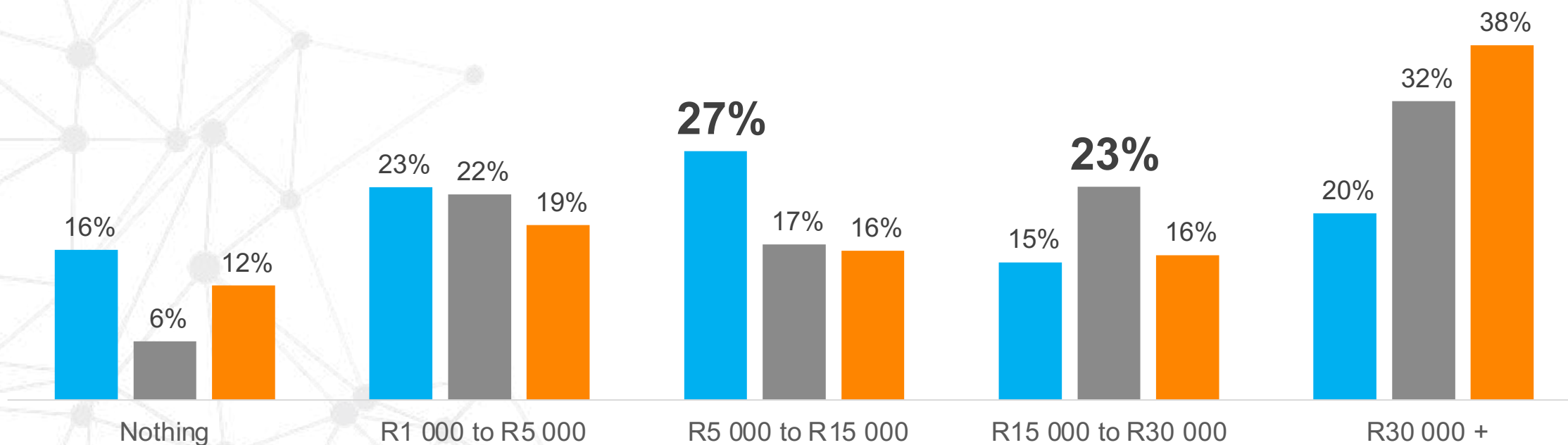
■ R10K to R20K ■ R20K to R40K ■ R40K+



The **family life stage adults** are more likely to be looking for **larger solutions** while the younger adults just need to keep the computers going!

Q13: How much do you think you will spend on these power solutions?

■ Under 35 ■ 35 to 55 ■ 55+



# 05

## **The future:**

who is at fault, how do we fix it | **when will it end?**



Given a range of possible causes, respondents ticked an average of 5 out of 8. It means that **taxpaying adults do realise just how 'big' the problem is**. Still, corruption and criminality is on top of just about everyone's list.

### Q15: What do you think is the main problem at Eskom?

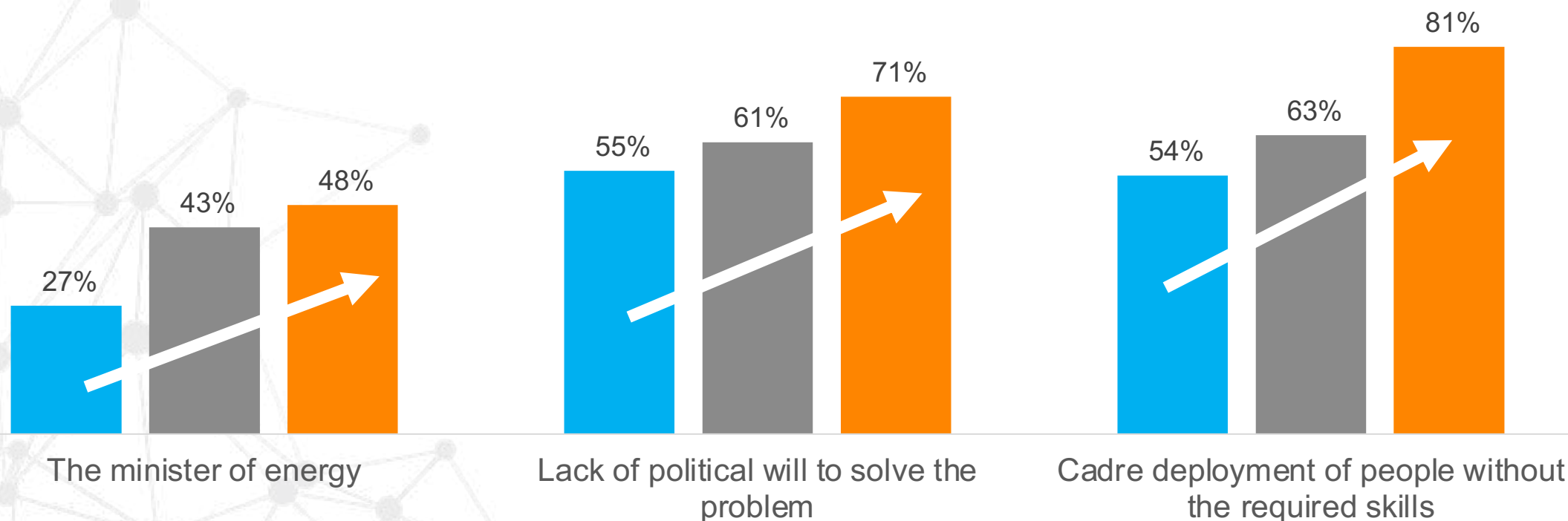
■ Totals



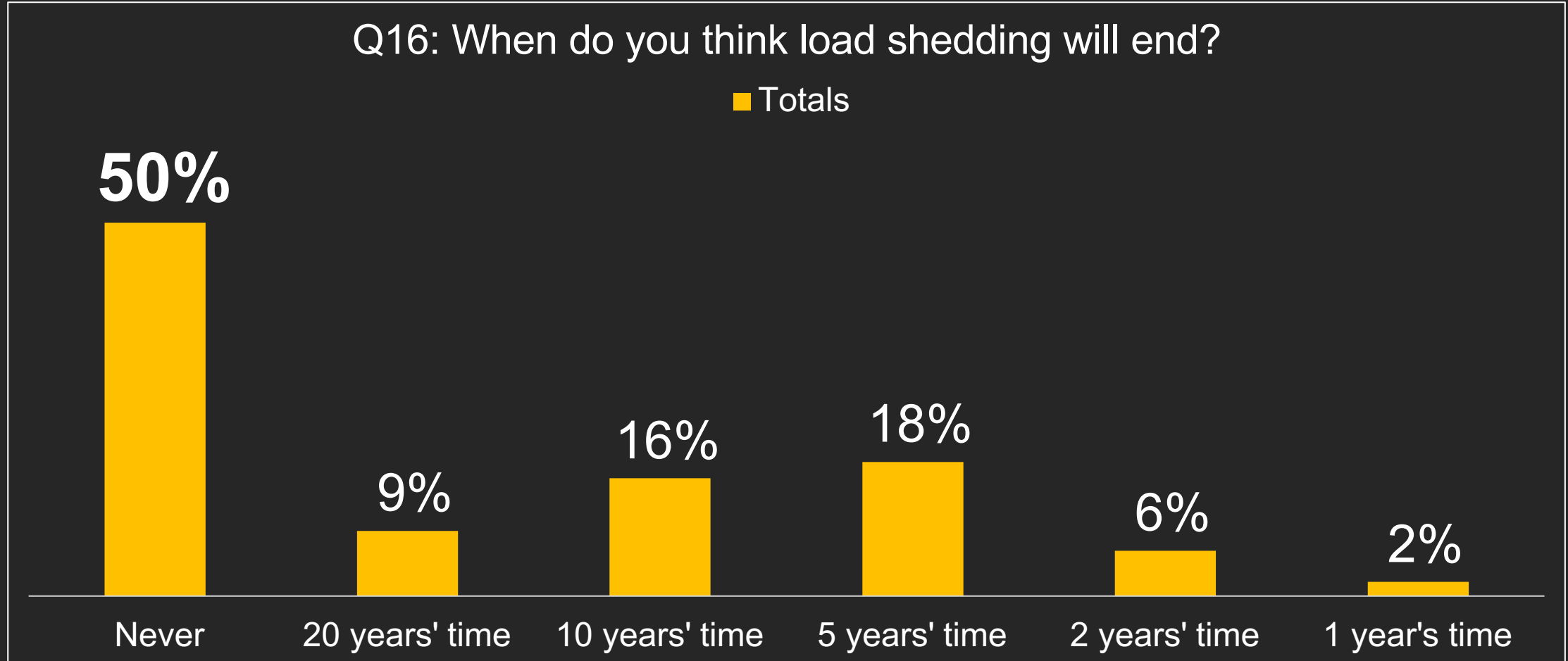
# Everyone pretty much agrees on the root causes BUT older consumers are even more likely to blame politics and politicians

Q15: What do you think is the main problem at Eskom?

■ Under 35 ■ 35 to 55 ■ 55+



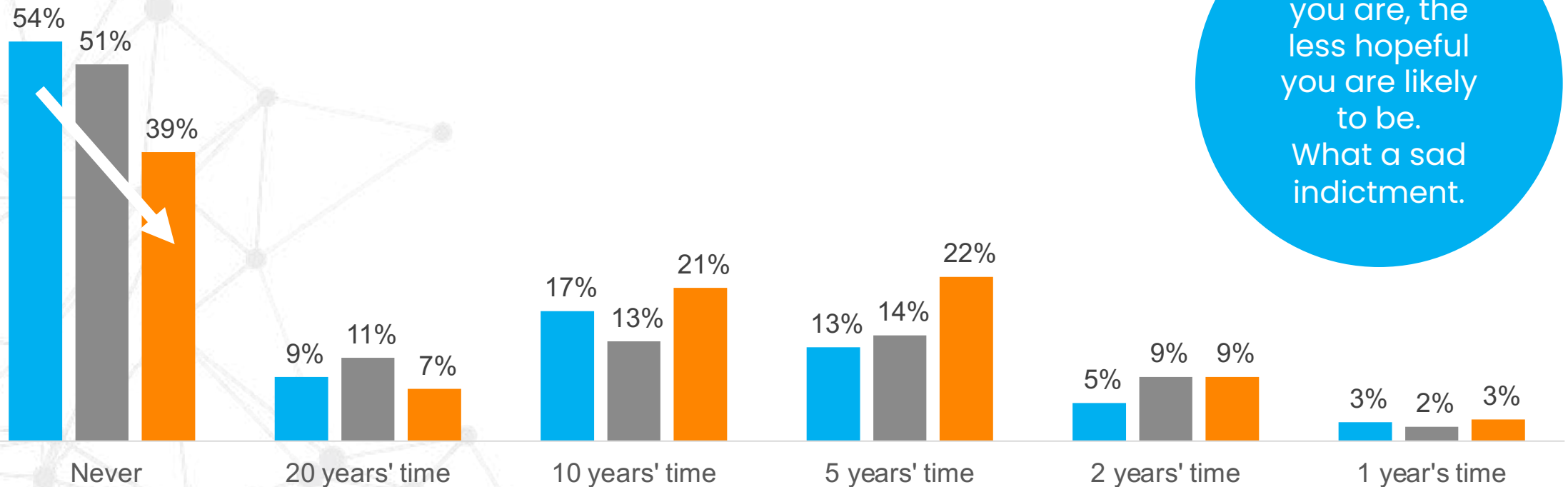
# Half the mid-market+ don't think blackouts will ever end.



# Women (57%), under R20K households (58%) and under 35s (57%) are even more likely to think blackouts will never end.

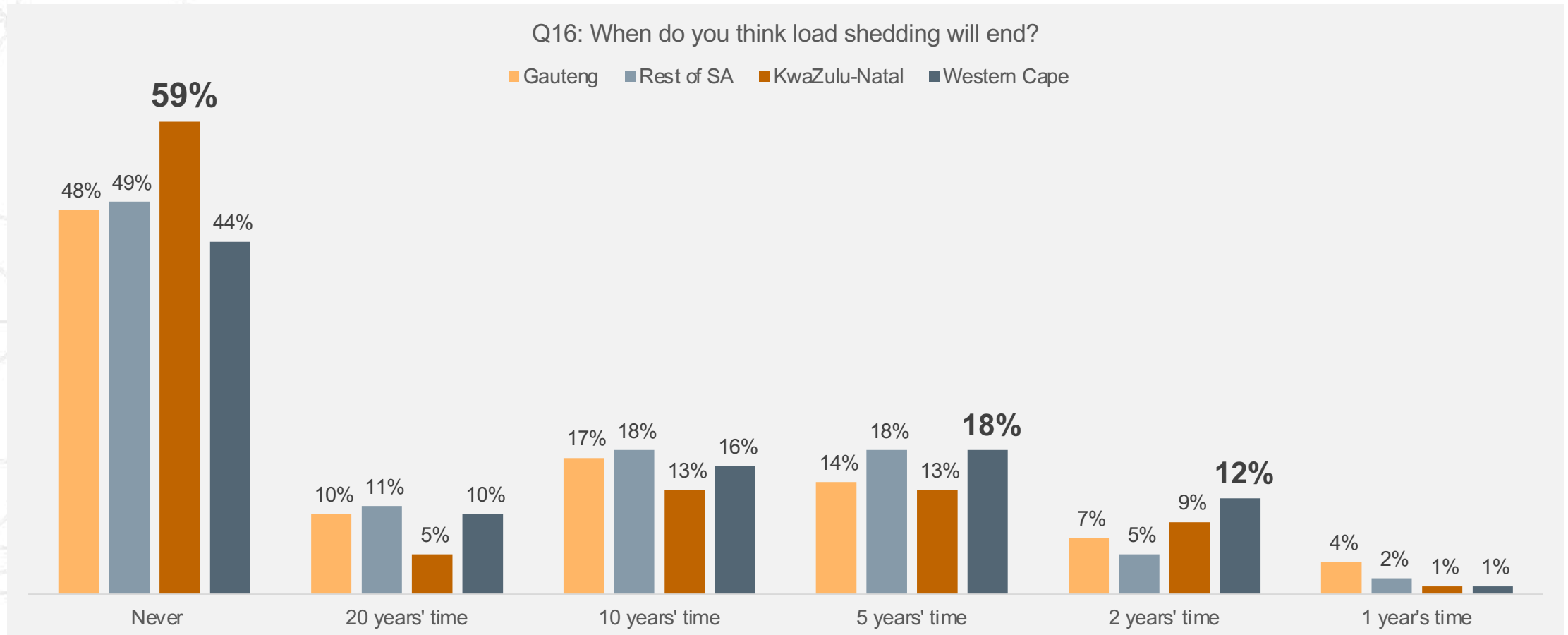
Q16: When do you think load shedding will end?

■ Under 35 ■ 35 to 55 ■ 55+



The younger you are, the less hopeful you are likely to be. What a sad indictment.

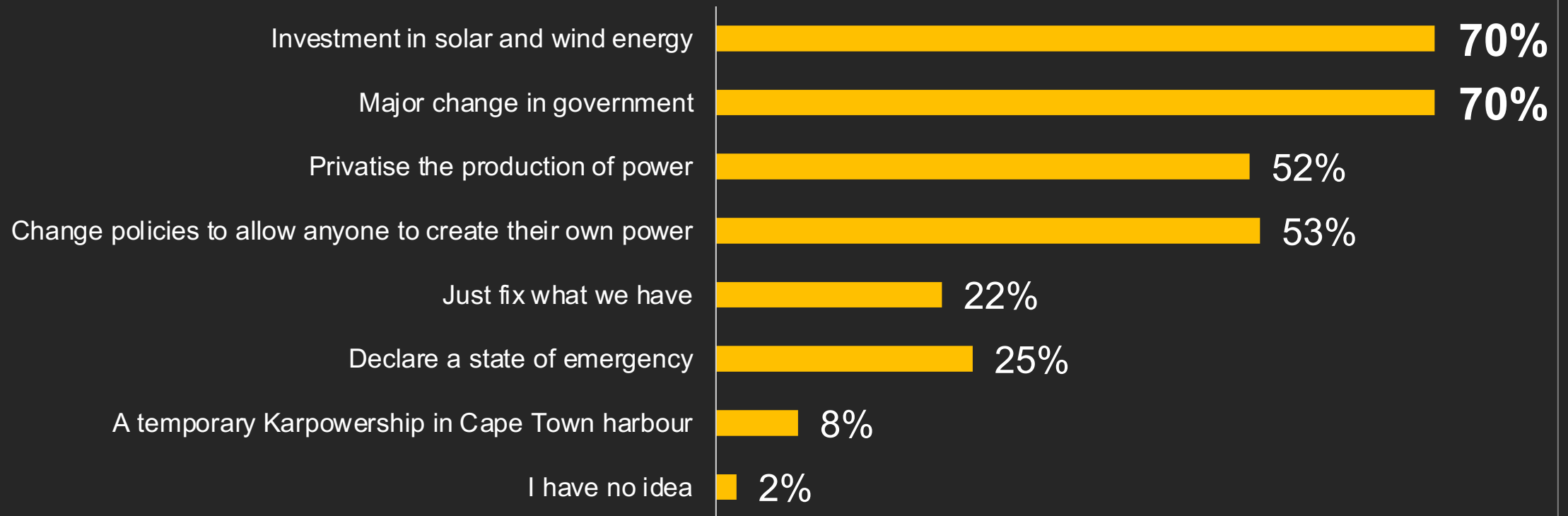
And interestingly, **people in the Western Cape** who have experienced lower levels and constant communication about solutions on a local level, are **a bit more positive where KZN are far less optimistic.**



**Sustainable initiatives and policy change** are on a par in terms of the things people believe need to change to fix the blackout crisis.

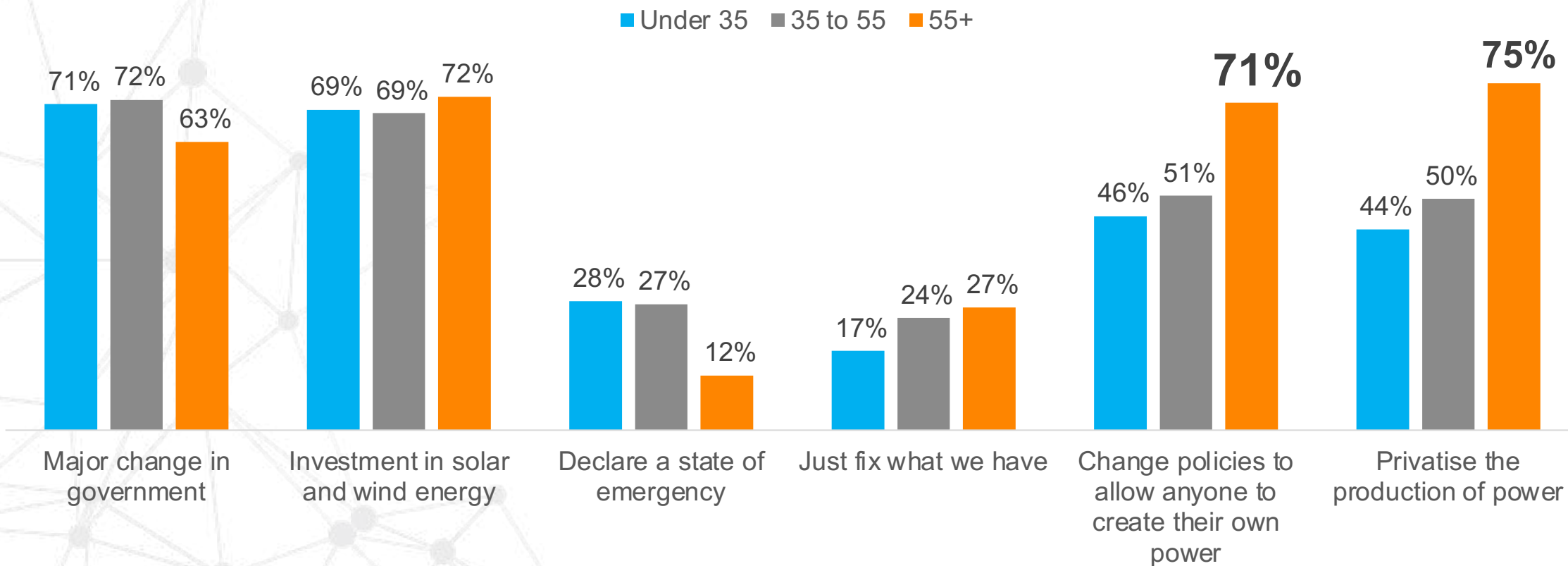
Q17: What is the solution to fix the SA power problem?

■ Totals



While everyone seems to agree on a change of government and looking to the sun, **older people are significantly more likely to know more about the importance of political 'policy'.**

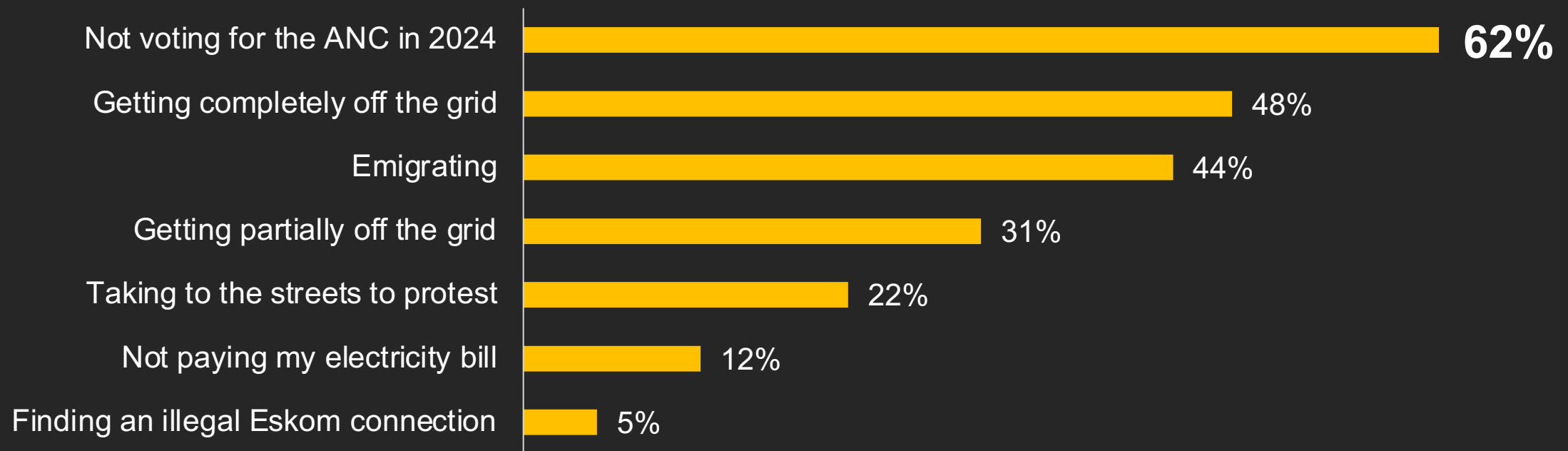
Q17: What is the solution to fix the SA power problem?



This is the slide the ruling party should take heed of. **Getting off the grid might be a dream but your vote is a reality!**

Q18: Which of the following have you seriously considered as a result of load shedding?

■ Totals



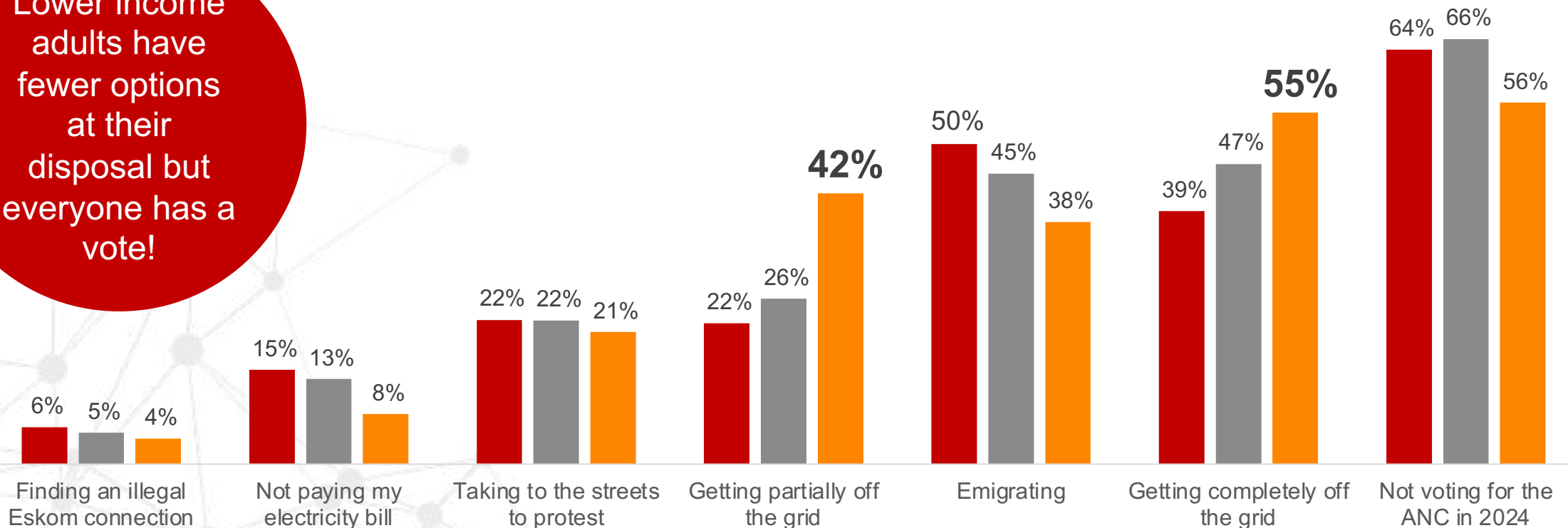


# This is not an 'elite' issue: **65% of all middle-income taxpayers believe that not voting for the ANC is something they are seriously considering** to solve the blackout crisis.

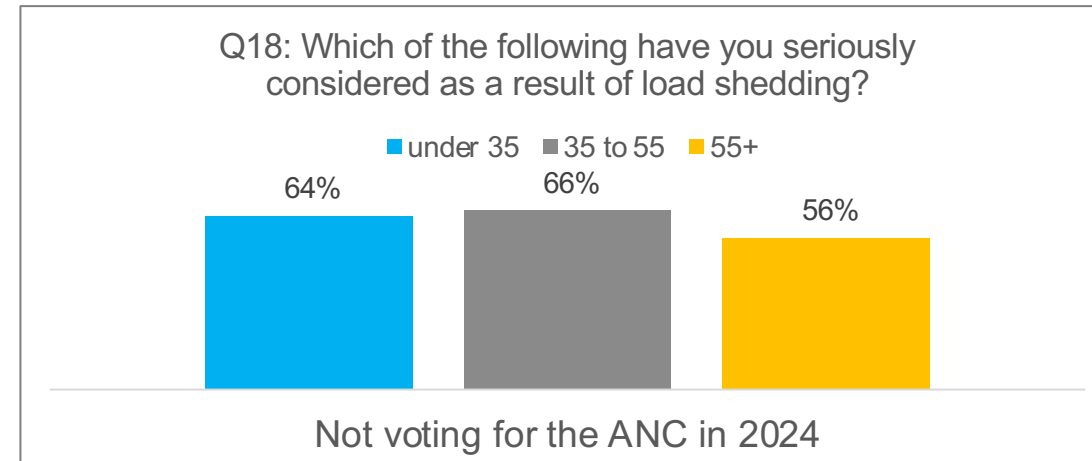
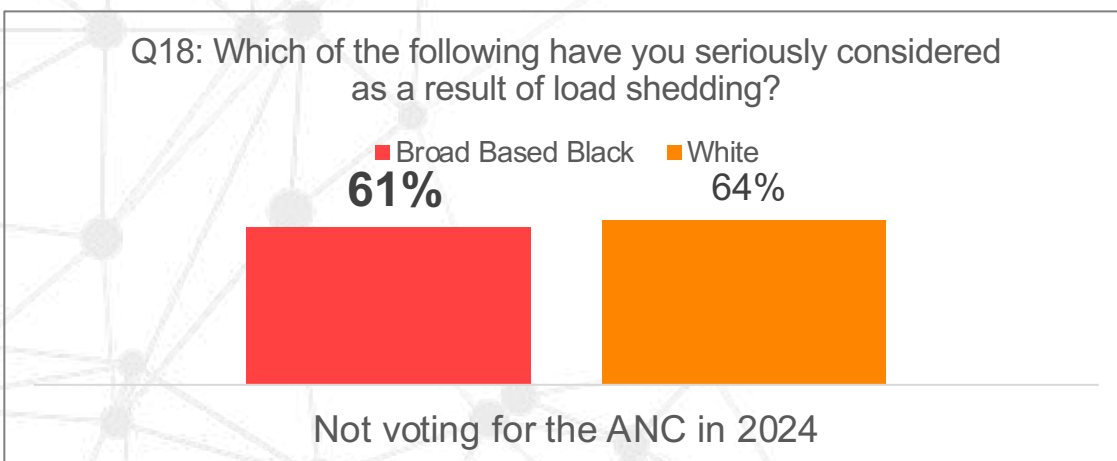
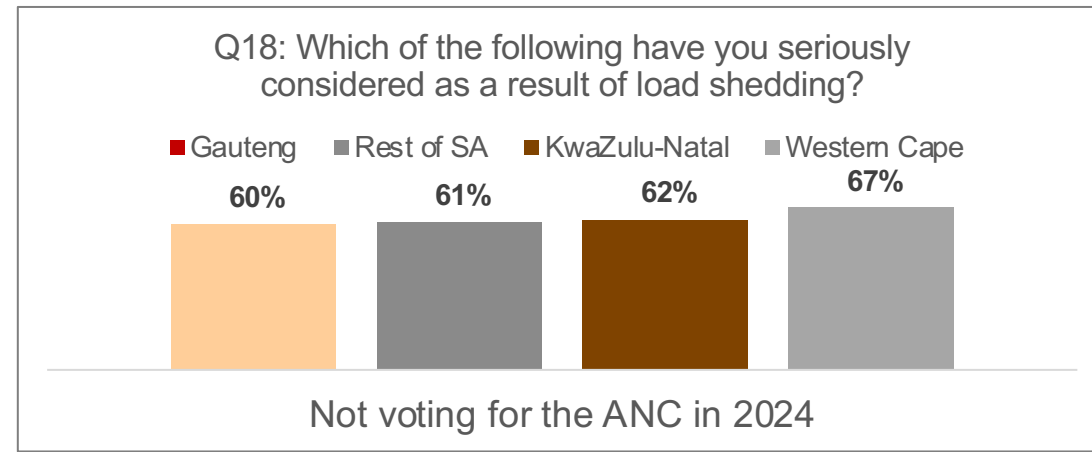
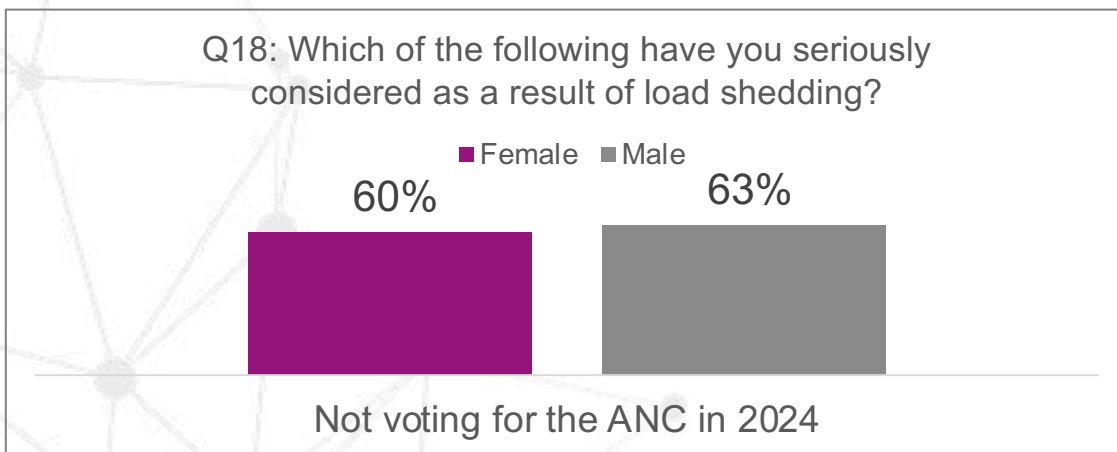
Q18: Which of the following have you seriously considered as a result of load shedding?

■ R10K to R20K ■ R20K to R40K ■ R40K+

Lower income adults have fewer options at their disposal but everyone has a vote!



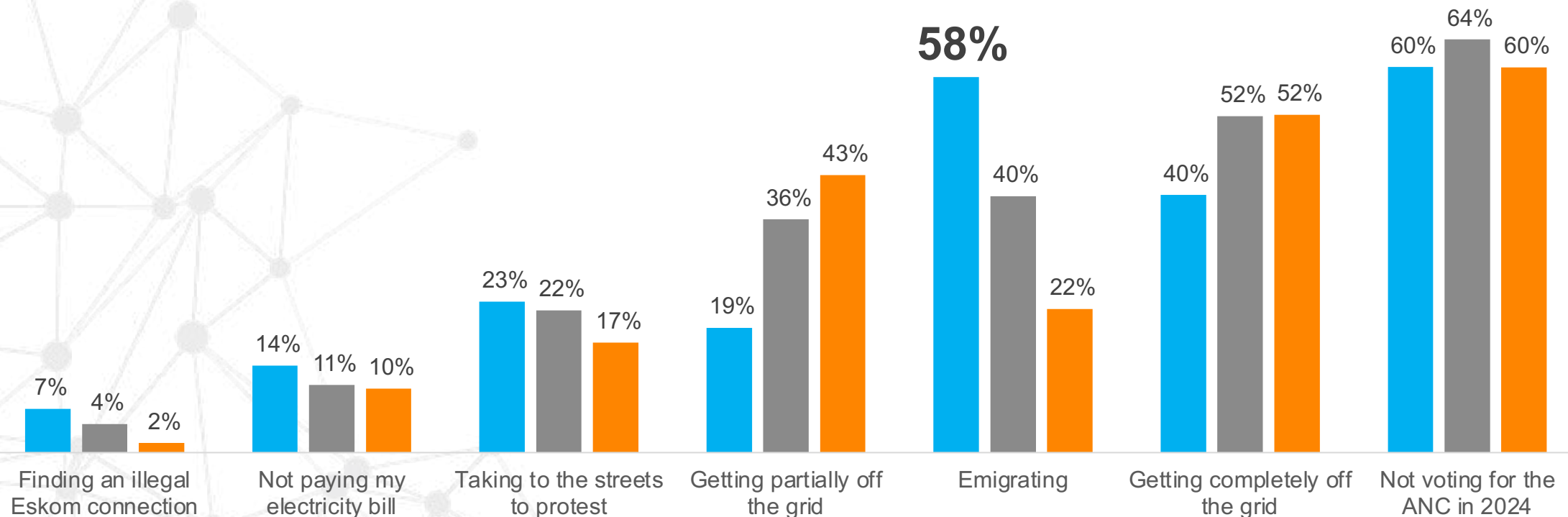
# In fact, irrespective of **gender, ethnicity, age or geography**, an average of just over **60% of taxpaying South Africans want to vote blackouts out of power.**



When **58% of young adults say they are thinking of leaving the country because of blackouts**, you have to know the problem is as much about our prospects for the next decade as it is about today.

Q18: Which of the following have you seriously considered as a result of load shedding?

■ Under 35 ■ 35 to 55 ■ 55+



# Conclusion

At the time of publication of this report, everything hangs in the balance. The Eskom leadership is still to be decided, there is no indication of to what extent anyone will be held accountable for the sabotage and theft that has brought our power grid (and our country) to its knees and – as is becoming an all-too-familiar a feeling – we, the people, just don't know what will happen next.

What is clear from this survey, and previous insights from BrandMapp, is that the taxpayers of South Africa are being pushed to the limits, not just of their tolerance, but of their ability to remain resilient, productive and positive about the future; from the immediate and short term to the prospects for the next generation. It could be argued that all social revolutions begin at the crest of a wave of urgency, and if that is indeed true, then we have certainly reached that point.

*“Hope is being able to see that there is light despite all of the darkness”*

– Archbishop Desmond Tutu

## WhyFive Insights

is a leading consumer insights, marketing and communications consultancy in South Africa and the company behind the annual BrandMapp survey. Now in its 10th year, BrandMapp is the largest independent study of mid-market-and-up South African society, ie. The 30% of adults who live in taxpaying households earning more than R10K per month.

[whyfive.co.za](http://whyfive.co.za)

## Silverstone CIS

are the engine-room partners behind The Blackout Report and multiple survey collaborations with WhyFive including BrandMapp. Silverstone specialises in the creation and management of mobile-first, digital, direct audience engagement solutions through a variety of bespoke platform solutions like Promoflo that encourage consumers to join brand communities and narrow the gap between product and consumer.

[silverstonecis.com](http://silverstonecis.com)

## SoftCopy

are the data science gurus behind BrandMapp and a premium supplier of survey analytics platforms and data services aimed at arming their clients with the tools necessary to turn raw data from white noise into visual storytelling and actionable insights.

[softcopy.co.za](http://softcopy.co.za)

FOR AN UNFAIR ADVANTAGE

VISIT **whyfive.co.za**

Stuart Lowe | 083 442 8111 | [stuart@whyfive.co.za](mailto:stuart@whyfive.co.za)

Brandon de Kock | 083 293 4473 | [brandon@whyfive.co.za](mailto:brandon@whyfive.co.za)

Julie-Anne Bell | 082 650 9228 | [julie-anne@whyfive.co.za](mailto:julie-anne@whyfive.co.za)

Raymond Buckle | 082 880 5756 | [raymond@silverstonecis.com](mailto:raymond@silverstonecis.com)

© WHYFIVE INSIGHTS 2021