

WhyFive BrandMapp Top End Study 2017 released

The WhyFive BrandMapp 2017 Top End Study that annually tracks changes at the top of South Africa's wealth triangle has just been released. According to the study's latest results the previously disadvantaged upper class has grown rapidly enough to surpass the white upper class in South Africa by at least 10% in the last five years and this figure continues to rise.



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South Africa may still be the most unequal country in the world in terms of rich and poor, but at least a more representative picture of the wealthier end of society is starting to emerge. “It’s extraordinary how fast things have changed at the top of South Africa’s wealth triangle and how difficult it is for marketers to get a focused view,” says Brandon de Kock, director of storytelling at WhyFive Insights. “In short, we’ve seen huge shifts in the demographic make-up of the wealthier segments over the past two years and it’s important to understand how that affects marketing strategy and decision-making. That’s what top end is all about.”

Five years ago, WhyFive collaborated with the UCT Unilever Institute on an extensive interrogation into the Top End, hosting seminars around the country, sharing insights and offering educated predictions for the years to come. Two years later, a second collaboration entitled ‘4 Million and Rising’ revealed that the black middle class eclipsed the white middle class for the first time and further predictions were made about how it was inevitable that the Top End would quickly follow suit.

Significant colour shift at the wealthy end

“In the course of positioning our BrandMapp data each year, we put maximum effort into understanding the size and shape of ‘wealthy’ South Africa,” explains de Kock. “In our terms, this equates to 10,8 million adults living in households earning R10K a month or more – our ‘middle class’, which is typically made up of those fortunate enough to look beyond basic survival and begin to enjoy some level of financial freedom. And more particularly, the elite group we call the Top End: the 2 million adults living in households earning R40K a month or more.”

The two million figure is important because that group has effectively doubled in size in five years, when it was significantly dominated by white South Africans. It seems we now have a middle class that's 85% previously disadvantaged, and a top end that appears to be at least 60%. "I guess while we are all being Bell-Pottingered", quips de Kock, "we've missed a significant colour shift at the wealthy end of the rainbow nation!"

The growth of the middle class, burgeoning government employment, BBEEE and alarming emigration trends are a few of the primary drivers of these shifts, all of which contribute to an ever-shifting consumer landscape for brands and marketers to navigate. And as an independent national study based on a sample of over 28,000 respondents, WhyFive's BrandMapp offers a unique roadmap.

Key statistics

What's important for marketers, explains de Kock, is to "tap into the heartbeat and read the minds of the majority of your potential or actual customers – plain and simple. And that's our sweet spot. This group of wealthy people doesn't just have the spending power, they also have massive influence on their workplace, their homes and their community networks. We believe that a deep understanding of the Top End and how it is changing is crucial for almost every brand in the country". And that understanding can be underpinned by countless insights sitting in the data, for example:

- 40% of Top Enders have flown internationally in the past year.
- 40% are regular users of Uber taxis.
- 50% say they are likely to switch cell providers in the next two years.
- On average, Top Enders are members of 5 different loyalty programs.
- 70% of say it's unlikely they will switch their primary bank – which means that 30% might!
- 80% listen to national radio stations.
- 85% surf the web on their phones – versus only 75% on a laptop.
- 90% admit to eating fast food – and almost a third of them do it at least once a week!
- 95% of Top Enders have shopped online.

Top End Roadshow

In addition to offering the Top End insights to interested parties in the form of presentations and a published report, WhyFive plans once again to partner with the UCT Unilever Institute of Strategic Marketing for the 2018 Top End Roadshow early in the New Year. "From a marketing perspective, this collaboration will add enormously to the research vault in South Africa," says the Institute's Paul Eagan. "From understanding the wealth journey itself, to the rise of the 'slasher' segment – who have more than one source of income – to lifestyle preferences and media consumption, the aim of the roadshow will be to determine how marketers can better connect with the top end segment. It feels as if we are at yet another pivotal moment in the evolution of the SA marketplace and we're really excited to help bring that story to life."

For queries relating to BrandMapp 2017 Top End Report or partnership opportunities for the 2018 Top End seminars please contact Stuart Lowe: stuart@whyfive.co.za.