

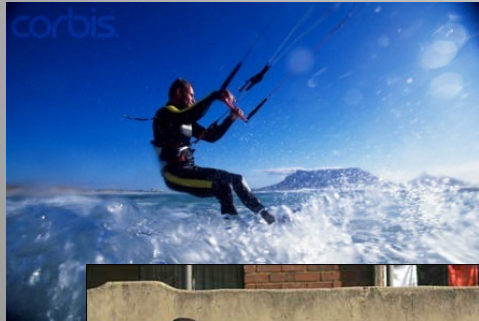
# Synovate Hotspots



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Research reinvented

# lifetolife



Bringing  
**South Africa**  
to life





# Bringing South Africa to life

- Encompassing excessive wealth and dire poverty, South Africa is a contradictory youngster who continues to confound and impress. A growing and talented middle class is certainly moving the country in the right direction. However, making sense of the new South Africa is always a challenge.
- To show you where Synovate's curiosity has taken us, we've produced this brief guide as a starting point for your successful journey into South Africa.
- Our discussion has three main parts:
  - Five 'Big Ideas' – important insights that will help you better understand South Africa
  - Implications for research in South Africa
  - Data

The background is a solid teal color. On the left side, there are several abstract, overlapping shapes in a lighter shade of teal. These shapes include a large, curved form that resembles a stylized letter 'P' or a similar character, and a smaller circle below it. The overall aesthetic is modern and minimalist.

# **Section I: Big Ideas**

## 5 Big Ideas

- First World equipment, Third World headaches
- My phone changed my life
- AIDS is a way of life (and death)
- My shoes are my car
- Rooted but suited

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# First world Equipment, Third world Headaches



## First World equipment, Third World headaches

Unlike most developing economies, South Africa offers some truly First World facilities.

Its banking system is of international standard and abreast of all the latest technological trends. The country also benefits from some of the world's cheapest electricity prices thanks to a large, efficient national transmission grid boasting more than 300,000 km of power lines.

Indeed South Africa exports power to its poorer neighbours. The road system is extensive and well kept, even if some of the vehicles on it are not. The sight of a truck apparently hurtling on a collision course toward you – an illusion usually created by a hopelessly bent axle – takes some getting used to. It's another small reminder that many South Africans are living firmly in the Third World.





## First World equipment, Third World headaches

Don't assume, for instance, that you can reach someone outside the major urban centres by phone – rural South Africans often don't even have a mailing address.

While it's true that the growing middle class living in a township have more money to spend, they may well be keeping it under a not-so-sophisticated mattress because there are no banking services in their community.

South Africa faces the twin challenges of widespread poverty and crime. Even if a car is out of the reach of most pockets, an obvious question to a visitor is why more people don't use motor scooters or bicycles to get around. The reason two-wheeled modes of transport remain stubbornly unpopular is simple. A bike or a scooter is not suitable for the distances that need to be covered and is simply too easy to steal.

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**My Phone Changed My Life**





## My phone changed my life

Mobile telephony is one area where South Africa's First World infrastructure has collided full on with its Third World roots – with striking effects.

The country's three mobile operators provide a network for more than 20 million subscribers. Between 1996 and 2005, mobile phone penetration rocketed from 2.4 per cent of the population to 41.6 per cent.

The impact has been widespread and startling. Many in rural areas had never had a land line or even a mail service – so a mobile phone number is their first ever 'address'! Even if they can't afford to own a mobile phone, many have access to a 'public' mobile phone where messages will be taken on their behalf.



## My phone changed my life

For some users, a mobile phone is their first piece of electronics and their first experience with a keypad. Learning to use it has built the skills necessary for them to land new jobs as cashiers or store clerks. For countless South Africans, their mobile phone has truly been life changing. The public and private sectors are working hard to create more opportunities for the underprivileged to benefit from their country's advanced technological base.

Absa Group, for example, launched the first fully portable bank branch in 2005 at Soweto's Chris Hani Baragwanath Hospital. The finance house says it hopes to transform the country by providing everybody with access to the banking system.

In another example, the national electricity company has taken innovative approaches such as 'pay as you go' billing to enable even the lowest-income households to access its electricity network.



## My phone changed my life

First World continues to meet Third World all over the country in startling ways: a tin shack glows as its occupants enjoy electric lights, a TV and a meal warmed in a microwave; a family's savings go from a jar in the kitchen to a bank account that can be monitored on the internet; people who have never received a letter now send text messages to their friends and family.

Government policies will ensure that the First and Third Worlds of South Africa continue to collide – and the changes are bound to be fascinating, progressive and unexpected.

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## Aids is a way of Life (and death...)



An estimated six million South Africans are expected to die from AIDS-related illnesses over the next ten years – more than ten per cent of the present population. In the year 2000 it was estimated that 4.5 million South Africans were living with HIV – five years later, that figure has risen to over 5.5 million.





## AIDS is a way of life (and death)

Local practices and culture have added to the difficulties in fighting the disease, problems that are further exacerbated by large influxes of illegal labourers from other parts of Africa.

The consequences are tragic and manifold. The huge number of orphaned children has placed extra pressure on grandparents, who are now having to raise their second set of children. Companies worry about the possibility of a dying working class. In some cases, young teenagers are becoming the heads of their household.

Marking death with a large funeral is an important tradition in the black community. One of the first things young people do when they start working is saving for their, or their family's, future funerals.



## AIDS is a way of life (and death)

Celebrating someone's life at his or her death is not just for the family – it is quite common to attend the funeral of someone you didn't know as an expression of community feeling.

Often, bodies are transported considerable distances to be buried in their tribal homeland. These celebrations and rituals are time-consuming, emotionally draining and expensive.

According to United Nations estimates, there are 1,000 AIDS-related deaths every day in the country. The international AIDS charity Avert says a recent survey showed that South Africans spent more time at funerals than they did having their hair cut, shopping or holding *braai's* (barbecues). It was also found that more than twice as many people had attended a funeral in the previous month than had been to a wedding.



## AIDS is a way of life (and death)

The average cost of a traditional funeral ceremony in South Africa is About US\$4,900, according to the UN, while the average annual household income in the country is only US\$3,630, says its child welfare agency, UNICEF.

HIV/AIDS is a public health problem but the private sector has been very visible in the fight against it.

Since much of South African industry is natural resource based and heavily reliant on physical labour, companies have been aggressive in educating their work forces and providing preventative, as well as medical, care.

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# 'My Shoes are my Car'





## My shoes are my car

Shoes are a particularly important way of showing status in South Africa. This may have to do with the fact that walking is still the main way of getting around as buying a car is out of reach for most people and two-wheeled transport remains unpopular.

Brands and status symbols drive a great deal of consumerism, especially among the lower-income groups. Some of the symbols of upward mobility are predictable – the satellite dish (which may or may not be picking up signals) prominently displayed above the front door, brand-name food and beverage products (Jack Daniel's whiskey is a favourite) and also prestigious makes of cologne or cosmetics.

By far the most important way for upwardly mobile families to show their status, however, is in what they wear. Being 'ge-labelled' means 'brand-labelled' and therefore 'welldressed' in a product perceived as aspirational. Visible and recognisable logos like those of Lacoste, Hugo Boss or Pringle communicate people's status and fulfill their need to stand out from the crowd.

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Rooted but suited...





## Rooted but suited

Although South Africans have shown themselves eager to adopt new products and Western customs, don't assume that they are willing to forsake their traditions wholesale. Instead, they show a great ability to move forward while still holding on to their roots. *Lobola* is a dowry (usually cattle) that is traditionally paid by the groom to the bride's family.

Even in today's South Africa, a young man without cattle or money will have trouble finding a bride. The practice of *lobola* now co-exists with Western practices like purchasing engagement rings.

Indeed, people often still choose to pay their *lobola* in cattle – even in urban areas! The *stockvel* is another example of a custom that is maintaining its relevancy in modern times. *Stockvel* members contribute a fixed amount of money to a pooled fund on a weekly, fortnightly or monthly basis.

Money is then drawn in rotation or as needed by its members.



## Rooted but suited

Although it began as a simple savings solution for those without access to the banking system, *stockvel* continues to be practised and not just by the rural or the poor. Research in fact has shown that even black executives in urban areas belong to *stockvels*, albeit highly sophisticated ones generating significant investment income.

To the average Westerner, the word ‘township’ conjures up images of grinding poverty, crime and violence. Many expected that the post-apartheid trend of upwardly mobile township dwellers moving out to the city or the suburbs would become irreversible. Many did leave— but not for long.



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## Rooted but suited

Families discovered they were spending their weekends commuting to visit family and friends still in the township. They found life in the city impersonal and cold compared with the 'open door' environment of the township where they could drop in unannounced and be welcomed with a large meal.

Today, the townships are undergoing a revival, and a wave of returnees are building mini-mansions amid the shacks. Developers have recognised this trend. Long a symbol of the wrongs of apartheid, Soweto has been transformed into a hot real estate market.

A large, stylized question mark graphic in a light blue color, positioned on the left side of the slide. The question mark is composed of a thick, rounded top curve and a vertical stem that ends in a small horizontal bar. The background is a solid dark blue color.

## **Section II: Implications for research**



# Interview methodologies

## Telephone

This is widely used for both consumer and business-to-business (B2B) research.

South Africa has one of the highest mobile telephony penetrations for a Developing market, particularly for pre-paid services. Many consumers use their mobile phone as their primary contact number. Fixed-line calls are still much cheaper than mobile ones, so only short surveys (eg, customer loyalty) should be conducted using the latter. Targeting rural consumers via their mobile phones is not common practice, as most use pre-paid handsets that do not reveal the user identity.

With computer-assisted telephone interviewing (CATI), allow a maximum interview length of 25 minutes per questionnaire for consumer research and 15 minutes for B2B research. Longer interviews are feasible, but there is a dramatic impact on success rate, cost and, ultimately, quality.

A longer B2B telephone survey ideally requires an appointment.



# Interview methodologies

## Face-to-face

The main data collection method for most of the continent, this is commonly used in South Africa. It is preferred for longer surveys of 25 to 30 minutes or above and incentives are usually required. In a B2B environment, you may manage an hour long interview without incentives, unless it involves a professional. Research among the lower living standard measure (LSM) subjects, specifically those in rural areas, is usually conducted face-to-face.

Two significant issues affect 'intercept' or door-to-door sampling, specifically in urban and metropolitan areas. The first is that people are highly security-conscious and will not readily let you into their home— even getting to their front door can be difficult. Second, in the cities, most shopping is done in malls rather than on a high street and access is usually very difficult to obtain. There is also an issue here of sample bias in favour of those with higher disposable incomes. Computer-assisted personal interviewing (CAPI) using GPRS (GSM network) equipment allows data to be streamed on completion of the interview to the central data centre.



# Interview methodologies

## Central location tests (CLTs)

This method works best with pre-recruitment. It depends on the complexity of the product or service being tested as to what level of incentive, typically cash, is required. In the case of the lower LSMs, recruitment may be undertaken in the townships, in which case the research company must either arrange or pay for transport to get respondents to the venue. This is because of the lack of a public transport infrastructure in South Africa.

Following the boom in property values over the past seven years, venues are also becoming more expensive. Intercept recruiting is difficult in metropolitan areas because of the 'mall culture' and problems with access.

In the small towns and townships it is more likely to be successful, but will tend to skew the demographics.



# Interview methodologies

## Focus groups

Pre-recruitment is essential. Groups are typically held in the early evening. Attendance can be poor aggravated by traffic congestion. Focus groups are always incentivised and group sessions of up to four hours are possible. It is assumed that food and drink will be provided. For lower-income groups, researchers will also need to arrange or pay for the respondents' transport.

## In-depth interviews

These are preferred for specific target groups such as professionals or B2B. Moderators must be carefully chosen to ensure that quality feedback is achieved.

## Ethnographic studies

This is proving popular particularly in townships. Researchers spend extended periods in homes observing families' behaviour. Living conditions may vary from a one-roomed shack to a four-bedroom, multi-storey modern house. No matter what their living standards, township residents generally access consumer goods through the same channels.





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# Interview methodologies

## Mystery shopping

Large databases of shoppers are needed to cater for diverse profiling requirements. Many shoppers speak English as a second language, so clear, concise briefing is critical to success. South Africa's size can raise costs if shoppers from other regions are needed to complete evaluations. The country's turbulent past under apartheid means people are sensitive to any feeling of being 'spied' on. Mystery shopping is often viewed as a form of spying and care must be taken to inform staff regarding the purpose of the research.

## Interactive voice response (IVR)

Synovate is pioneering the use of IVR in South Africa and has launched several solutions using Synovate ViewsCast. The country's telecom infrastructure can support all the requirements of a successful IVR implementation. The technique is also well suited to the South African market because of the geographical remoteness of many consumers, the high level of mobile phone penetration, low literacy rates in some areas, and the many languages spoken.

## Online

Internet penetration among consumers is still low compared with developed markets, but is starting to increase with the advent of both fixed line and Wireless broadband which were launched in 2005. For B2B or business-to-employee(B2E) research, online methods are likely to become more common in the next three years.



## Ethnic and religious groups

South Africa is a nation of over 44 million people of diverse origins, cultures, languages and beliefs. Around 79 per cent are black (or African), 9 per cent white, 9 per cent 'coloured' – the local term for people of mixed African, Asian and white descent – and 2.5 per cent Indian/Asian. Just over half the population live in urban areas.

Two-thirds of South Africans are Christian, the largest church being the indigenous Zion Christian Church, followed by the Dutch Reformed and Catholic churches. Many churches combine Christian and traditional African beliefs, and many non-Christians espouse these traditional beliefs. Other significant religions– though with much smaller followings – are Islam, Hinduism and Judaism.

Do try to understand the respondent's environment, religion and culture. For example, 'bird-watching' may not mean the same thing for some as it does for those who make it a hobby.

# Questionnaires

A lack of consistent, high-quality and above all free education has resulted in varying levels of literacy and understanding among respondents.

This raises a number of issues:

- Language
- Subject matter
- Length
- Questions and phrasing



# Questionnaires

## Language

Although English and Afrikaans are the languages predominantly used in research and the most universally understood in South Africa, the existence of 11 official languages poses a challenge. When research targets rural participants, it may be necessary to translate the survey into one or more of the other nine languages.

Design questionnaires to be easily understood by all groups. Bear in mind that many adults may not be able to read a show card.

Researchers should be briefed by someone who understands the field workers' Mother tongue to ensure a common understanding is created.

Mock interviews should be conducted after every briefing session to ensure that all interviewers understand what can happen in the field and how to deal with queries.



# Questionnaires

## Subject matter

In traditional African cultures, women will not talk openly about personal issues such as sexuality or hygiene. Tread carefully when approaching these subjects. Don't expect a uniform response to personal issues among rural respondents. Individual tribal cultures will also be different.

## Length

Length of interviews may be affected if translations are taking place between an English questionnaire and one of the other languages. Spoken and written forms of the other languages often differ from one another which makes translation challenging.

South Africa has emerged as the seventh most expensive market to conduct research in, behind Canada and ahead of Germany. This often takes foreign companies by surprise and can lead them to underestimate costs.

(Source:ESOMAR Pricing Survey 2005.)



# Questionnaires

## Questions and phrasing

To interview people in deep rural areas, permission often must first be granted by the local chief. The chief may need to meet with a council and the process could take weeks.

Even then, many local tribal cultures will not allow women to be interviewed. Sometimes, the husband's permission is required. Often women cannot be interviewed by male researchers. Expect to extend timing, and take care not to offend the local community or they will not talk to you again.

# Guidelines

## Guidelines for telephone interviews are:

- Consumer up to 30 minutes
- Business up to 1 hour
- CLT up to 1 hour
- Focus groups up to 1.5 hours
- In-depth up to 1 hour

## Guidelines for face-to-face interviews are:

- Consumer up to 25 minutes
- Business up to 15 minutes

## Guidelines for online interviews are:

- Consumer up to 10 minutes
- Business up to 20 minutes



## Schedules

It is important to consider public holidays in South Africa. Bear in mind that the Easter holiday is determined by the lunar calendar and dates vary slightly from one year to the next.

### **South African Public Holidays:**

- 1 Jan New Year's Day
- 21 Mar Human Rights Day
- 9 Apr Family Day
- 6 Apr Good Friday (2007)
- 27 Apr Freedom Day
- 1 May Workers' Day
- 16 Jun Youth Day
- 9 Aug National Women's Day
- 24 Sept Heritage Day
- 16 Dec Day of Reconciliation
- 25 Dec Christmas Day
- 26 Dec Day of Goodwill

Avoid scheduling research in the week before or after a major holiday, as many people take time off either side of the official holiday dates especially around Christmas and Easter when schools and universities have their longest breaks.



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## **Section III: Data**

# Sources

This data is assembled from a variety of sources including:

- A Synovate telephone survey of a representative sample of adults in Johannesburg, Durban and Cape Town conducted in April 2006
- Euromonitor
- Economist Intelligence Unit (EIU)
- Central Intelligence Agency World Factbook
- UNDP South Africa Country Report

## Basic country facts

- Population: 44.4m†
- Urban population as a percentage of total population: 57.9%\*
- Total area land: 1,219,912 sq km†
- Rank in world by area: #25†
- Number of cities with a population over 10 million: 0
- Number of households: 12.53m\*
- Average household size: 3.4\*

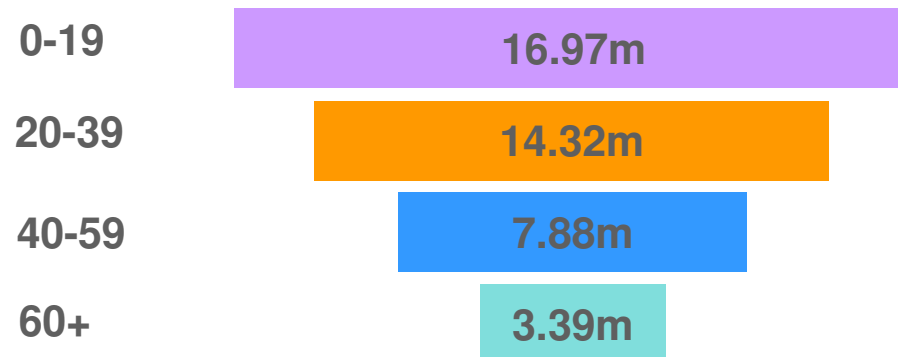
Sources: \* EIU 2005 † Central Intelligence Agency World Factbook

## Economy (2005)

- GDP: 1,505,425m (R)§
- GDP per capita: 5,630 (US\$)\*
- Growth in GDP, 2005 vs 2000 (CAGR): 10%§
- Growth in GDP per capita 2005 vs 2000 (CAGR): 12%\*
- Amount of Foreign Direct Investment inward: 7,500m (US\$)\*

Sources: § Euromonitor \* EIU 2005

## Population distribution by age (2005)



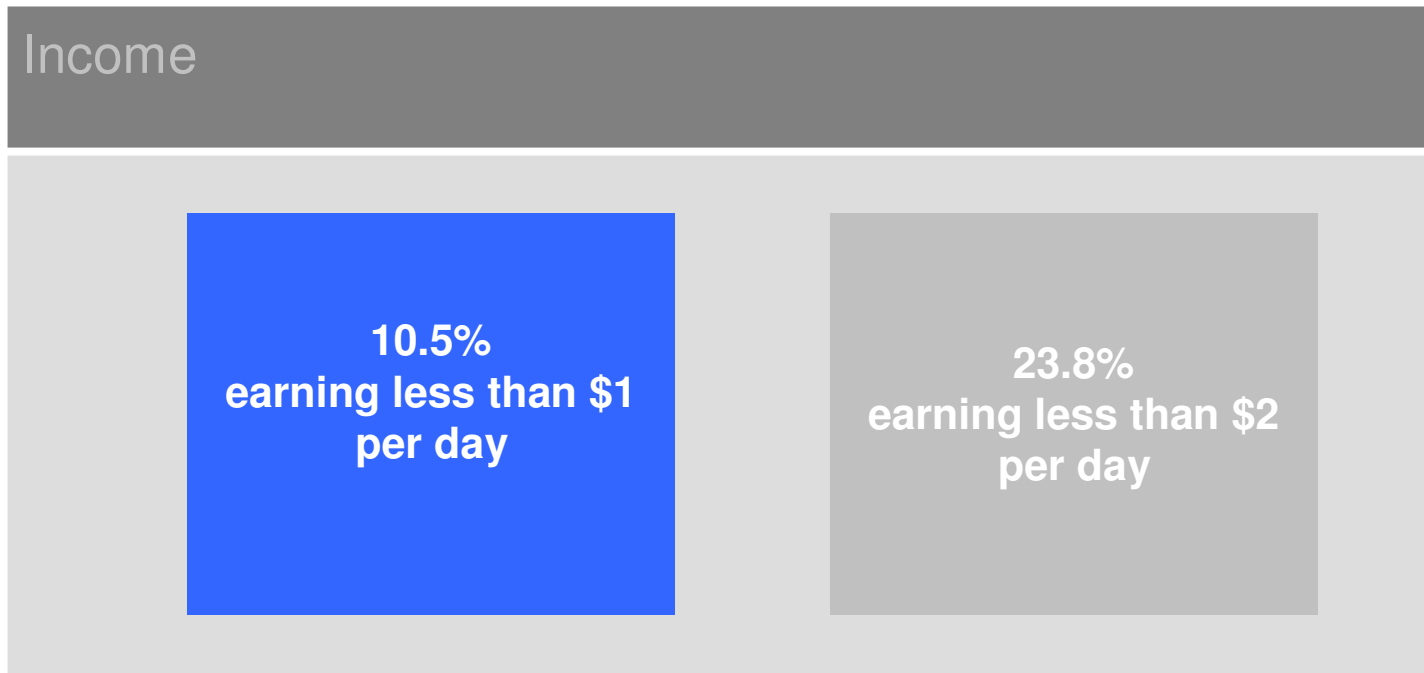
Source: EIU

## Education

	2004
Population aged 15-19 in education	NA
Adult literacy rate	87.1%

Source: Euromonitor

# Income



Source: UNDP South Africa Country Report 2002

## Household income

2000	2001	2002	2003	2004	2005	CAGR ('00-'05)
5,980	4,990	4,350	6,580	8,180	8,820	8%

Source: EIU

## Savings rate (as a percentage of income)

2000	2001	2002	2003	2004	2005
15.8%	15.4%	16.7%	15.5%	14.0%	13.5%

Source: EIU



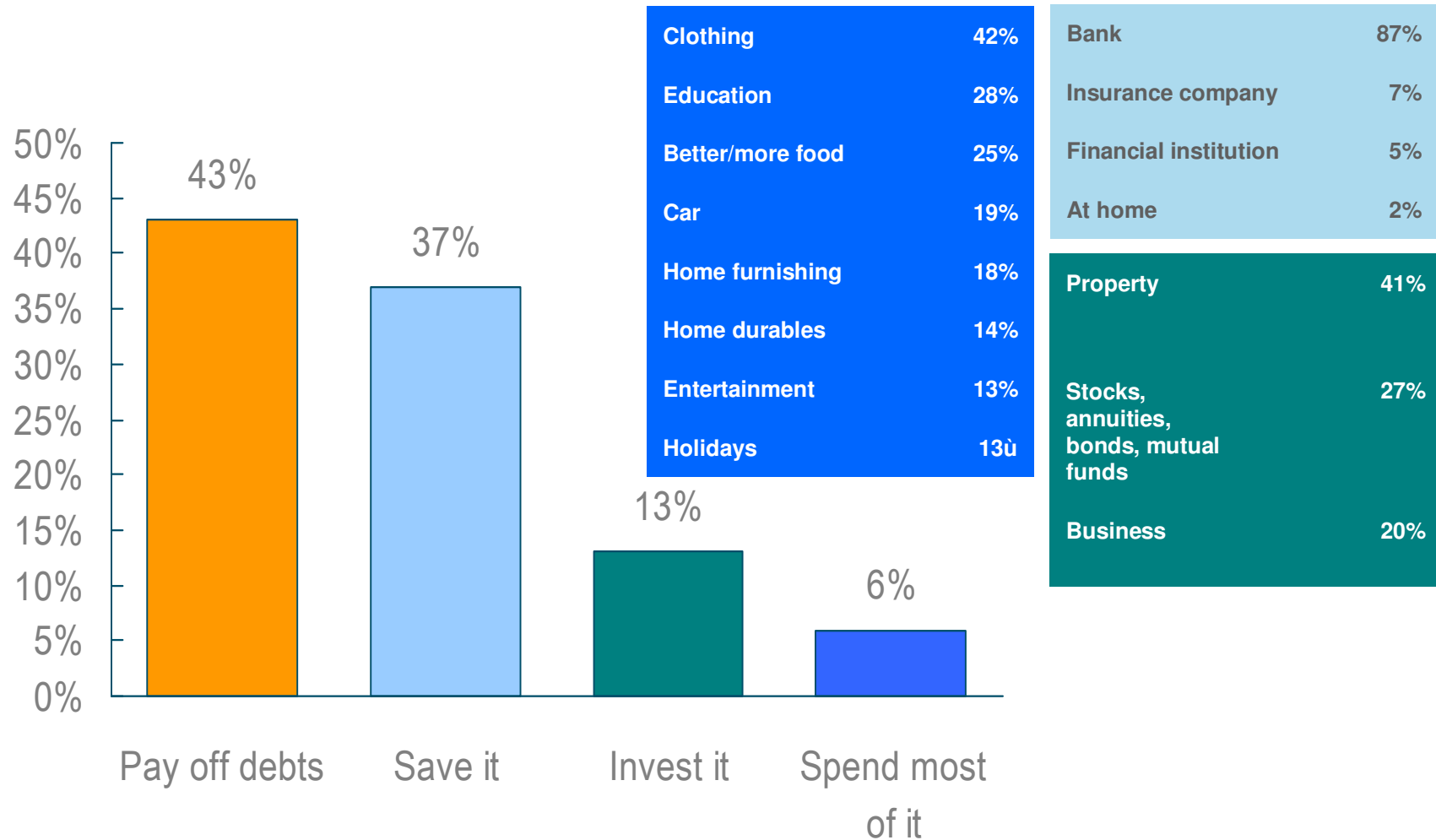
# Consumer Expenditure 2005

	2005
Consumer expenditure	866,219.97m (R)
Food and non-alcoholic beverages	18.8%
Alcoholic beverages and tobacco	8.8%
Clothing and footwear	4.9%
Housing	12.0%
Transport	16.9%
Hotels and catering	2.6%
Household goods and services	9.6%
Health goods and medical services	7.9%
Communications	2.0%
Leisure and recreation	4.6%
Education	2.5%
Miscellaneous goods and services	9.5%

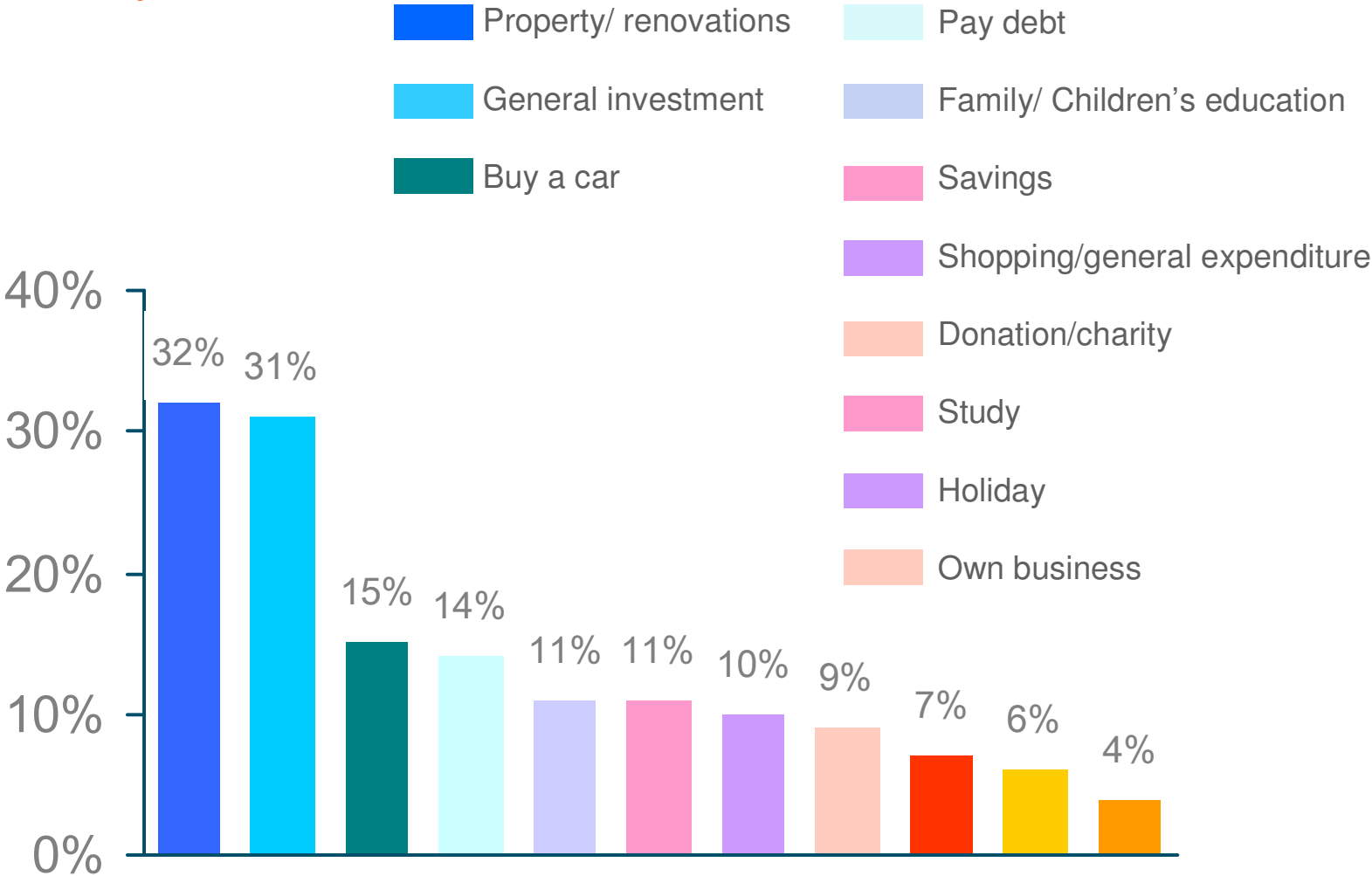
Source: Euromonitor



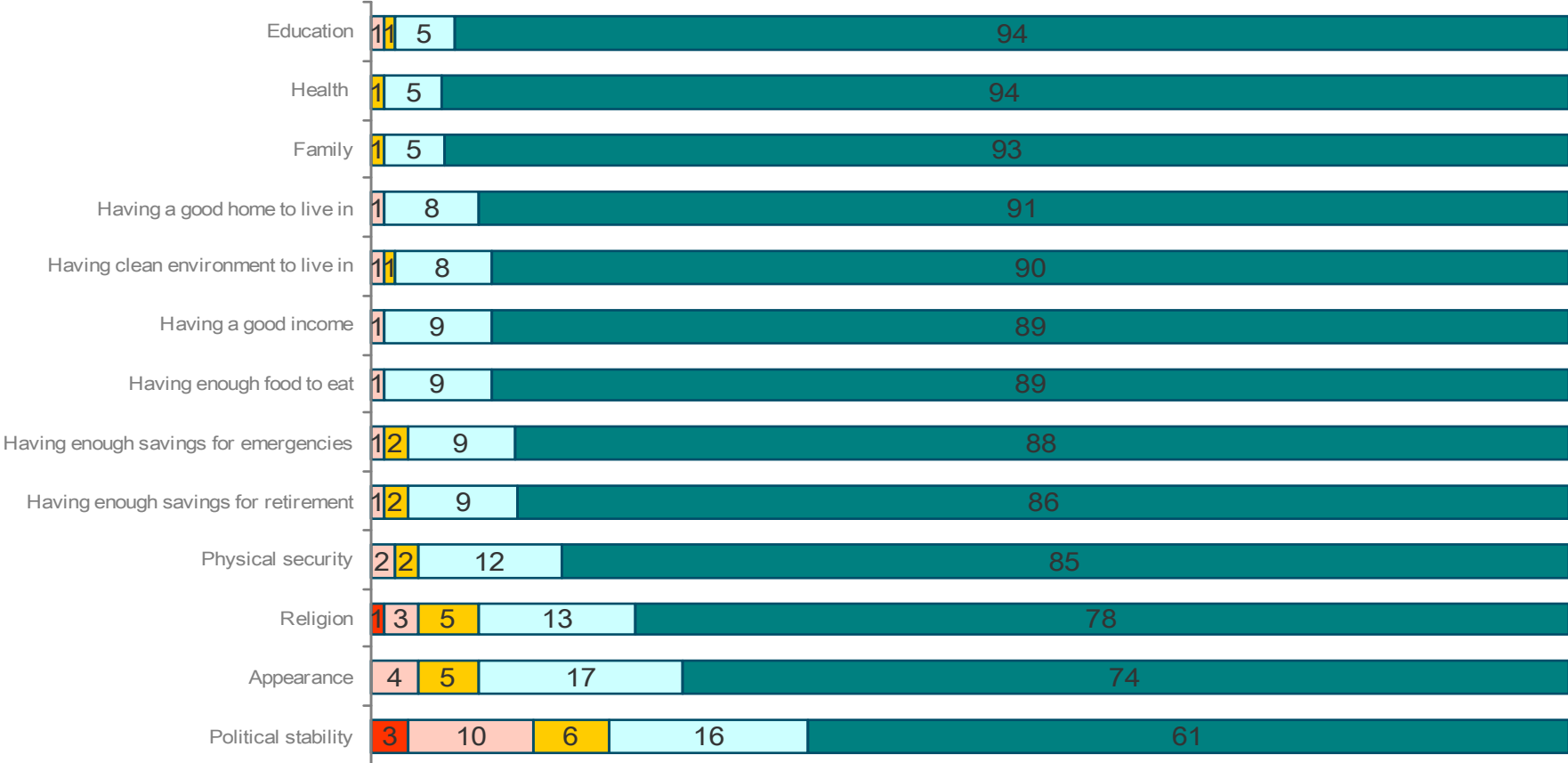
# What would you do with 20% more household income?



# What would you do in you won \$100,000 in a lottery

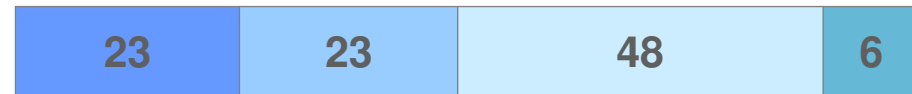
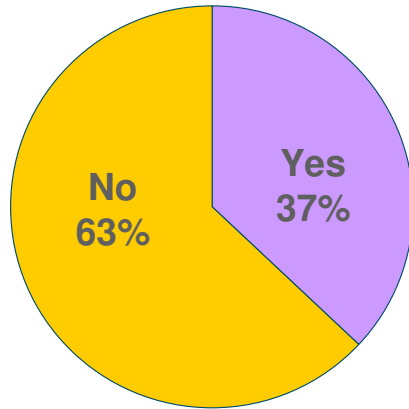


# Lifestyle personal importance (numbers in percent)



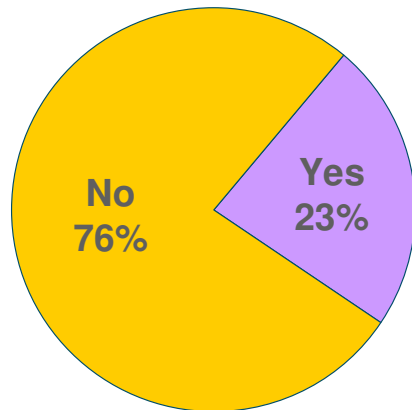
# Cyberspace

## Internet access








- Both home and office
- Home only
- Office only
- Others

## Personal email




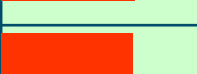

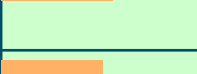



# Products and services – usage during past three months and brand image

	Used past 3 months	Best Brand	2nd Brand	3rd Brand
<b>Travel</b>				
<b>Airline</b>	 10%	SAA	Kulula Air	British Airways
<b>Hotel Group</b>	 8%	Holiday Inn	Protea	Sun International
<b>Alcohol</b>				
<b>Beer</b>	 24%	Castle	Amstel	Black Label
<b>Brandy/Cognac</b>	 17%	KWV	Klipdrift	Fish Eagle
<b>Whiskey/Scotch</b>	 15%	Bells	Johnnie Walker/ Jack Daniel's	J&B



# Products and services – usage during past three months and brand image

	Used past 3 months	Best Brand	2nd Brand	3rd Brand
<b>Soft Drinks</b>				
<b>Fruit Juice</b>	 69%	Liquifruit	Fruit Tree	Ceres
<b>Cola</b>	 59%	Coca-Cola	Fanta	Sprite
<b>RTD Coffe</b>	 40%	Ricoffee	Nescafé	Frisco
<b>RTD Tea</b>	 39%	Five Roses	Lipton Tea	Glen Tea
<b>Auto</b>				
<b>Car/Pick-up Truck/ SUV</b>	 34%	Toyota	Volkswagen	BMW
<b>Fuel for your car/ motorcycle</b>	 31%	BP	Shell/Engen	Caltex
<b>Motorcycle</b>	 3%	Honda/Kawasaki/ Yamaha	Ducati	Harley-Davidson

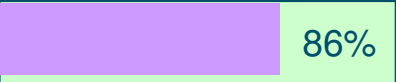
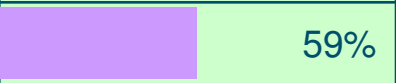
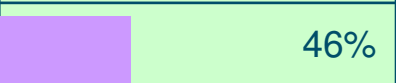

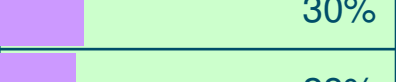
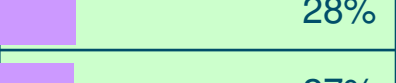

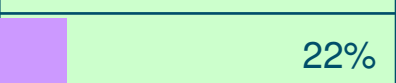
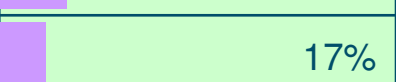


# Products and services – usage during past three months and brand image

	Used past 3 months	Best Brand	2nd Brand	3rd Brand
<b>Retail</b>				
Everyday clothing store	40%	Edgars	Woolworths	Mr Price
Designer clothing store	19%	Levi's	Truworths	Edgars
Fast food chain	55%	KFC	Nando's	McDonald's/Steers
<b>Technology</b>				
Mobile phones	61%	Nokia	Samsung	Motorola
MP3 player	24%	Sony	LG/Sansui	Samsung

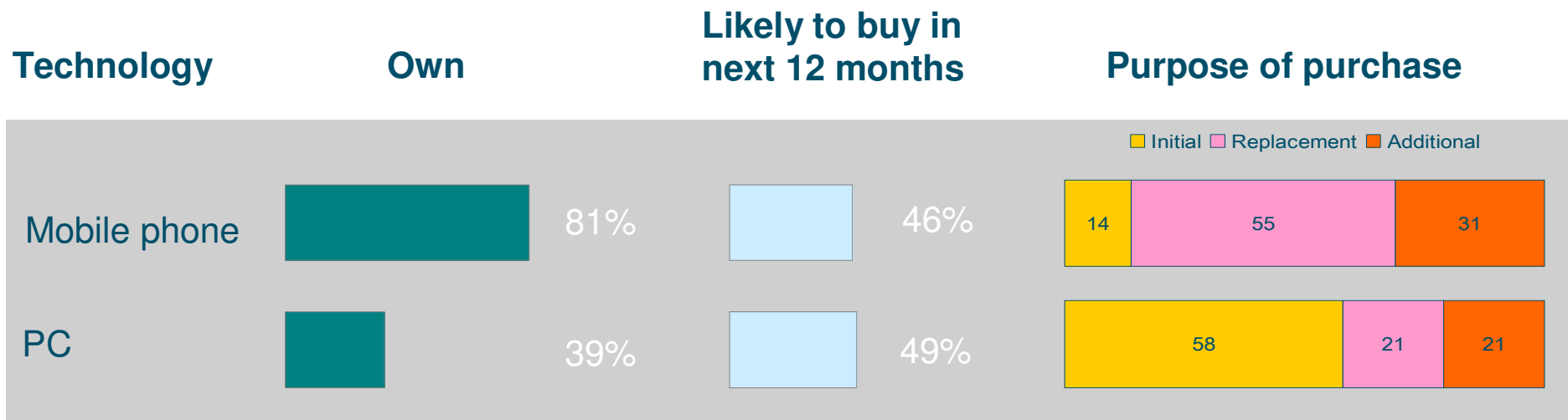


# Products and services – usage during past three months and brand image

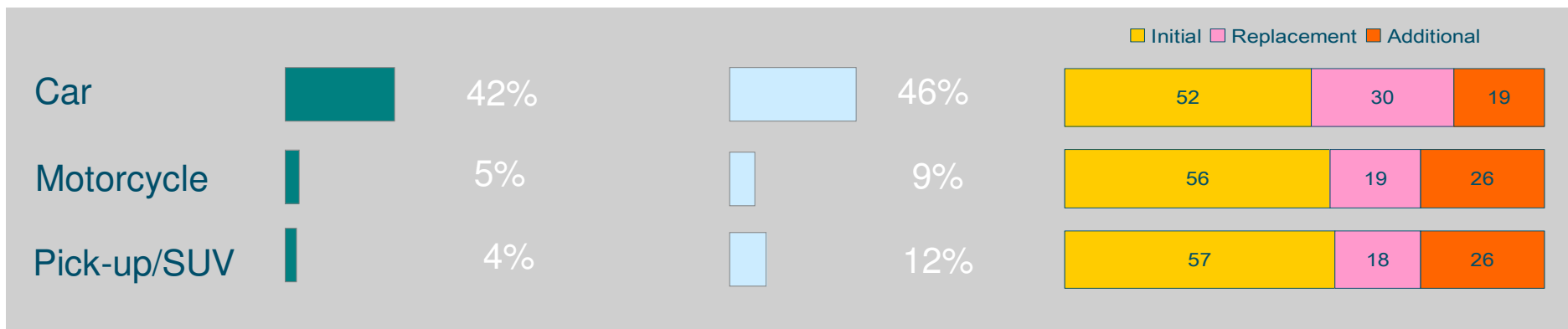
	Used past 3 months	Best Brand	2nd Brand	3rd Brand
<b>Personal Care</b>				
<b>Soap</b>	 86%	Lux	Sunlight	Protex
<b>Shampoo</b>	 59%	Pantene	Head & Shoulders	Colgate/Body on Tap
<b>Conditioner</b>	 46%	Pantene	Colgate/ Dark & Lovely/ Sunsilk	Body on Tap/ Revlon
<b>Facial Moisturiser</b>	 30%	Pond's	Clinique	Nivea
<b>Shower Gel</b>	 28%	Radox	Lux	Palmolive
<b>Facial Cleanser</b>	 27%	Pond's	Avon/Johnson & Johnson	Clinique/ Revlon/ Justine
<b>Lipstick</b>	 22%	Revlon	Avon	Estée Lauder
<b>Eye Make-up</b>	 17%	Revlon	Avon	Clinique
<b>Face Make-up</b>	 17%	Revlon	Avon	Clinique



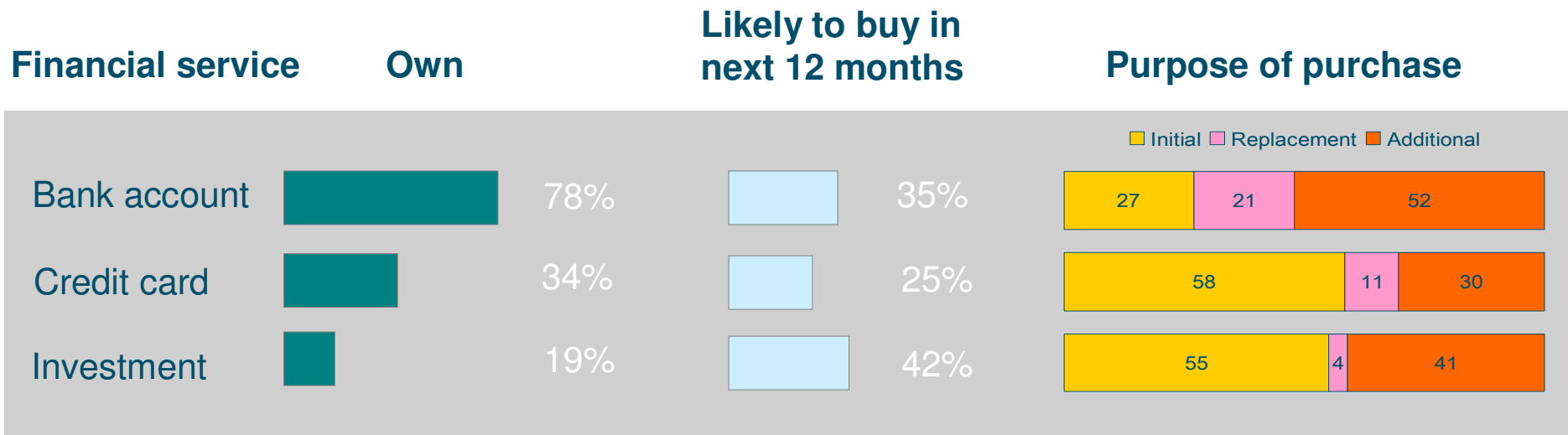
# Product ownership



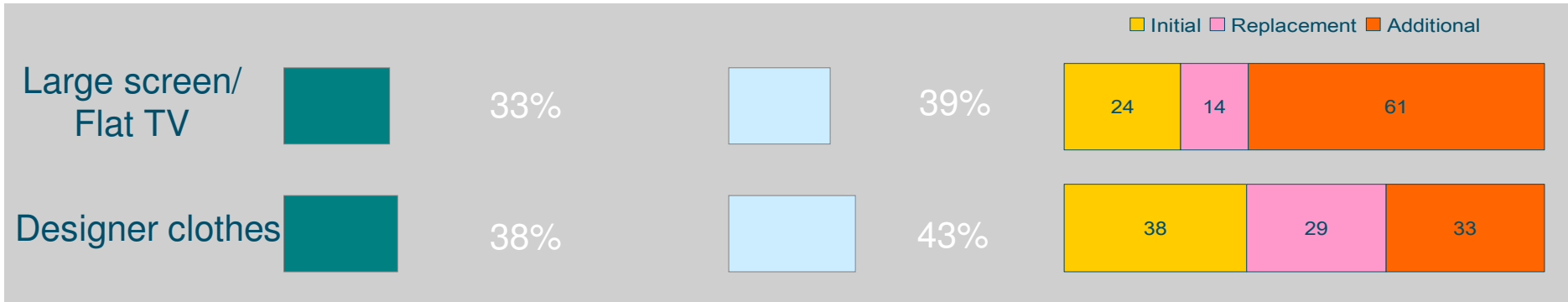
## Vehicle



# Product ownership



## Luxury goods



# Global retailers' image

	Awareness	Very positive	Positive	Neutral	Negative	Very Negative
Carrefour	2	18	45	18	-	-
Wal-Mart	28	21	24	35	1	-
Tesco	11	19	19	45	-	-

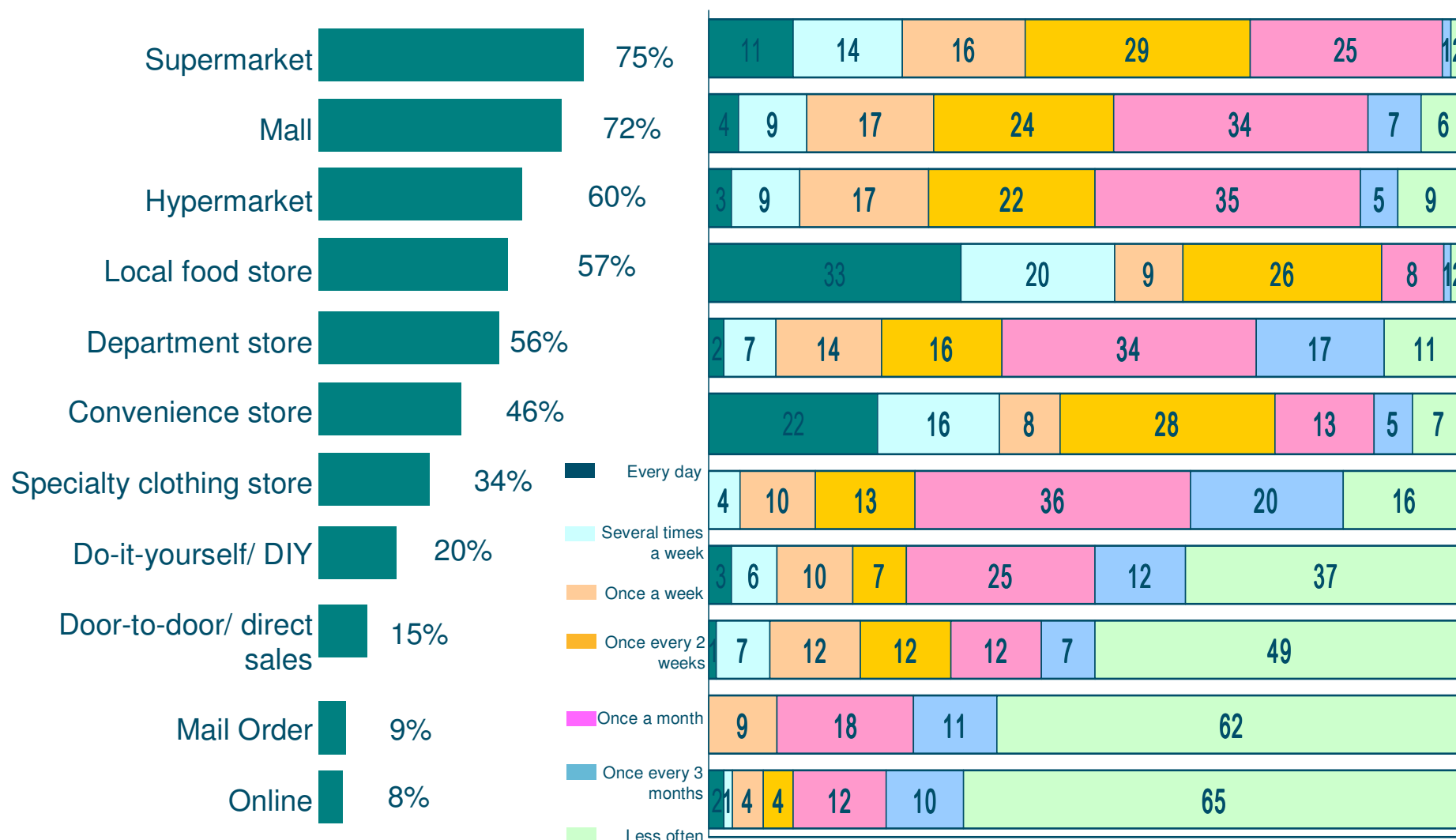
# How do I spend my weekday/weekend (hours)

	Media/Information			Sleeping
	Reading newspapers/magazines	Surfing the Internet	Watching TV	
Weekday	1.32	0.7	3.19	6.58
Weekend	1.19	0.44	3.3	6.97

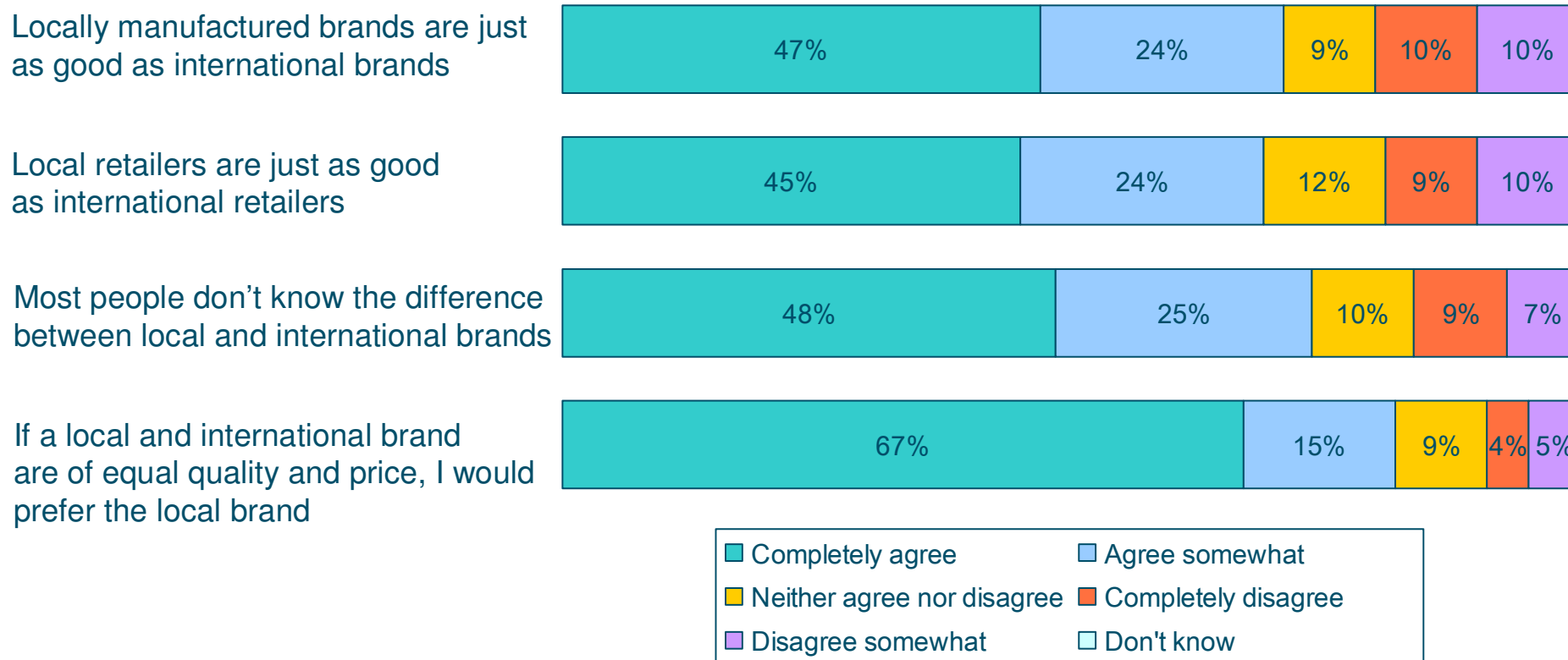
	Working/school			Exercising/ Playing sports	Staying at home
	Commuting	Housework	Work/school		
Weekday	1.3	2.11	4.23	0.97	8.24
Weekend	0.85	111.85	1.38	0.73	7.11



# Retail penetration and frequency (past year)



# Local or international



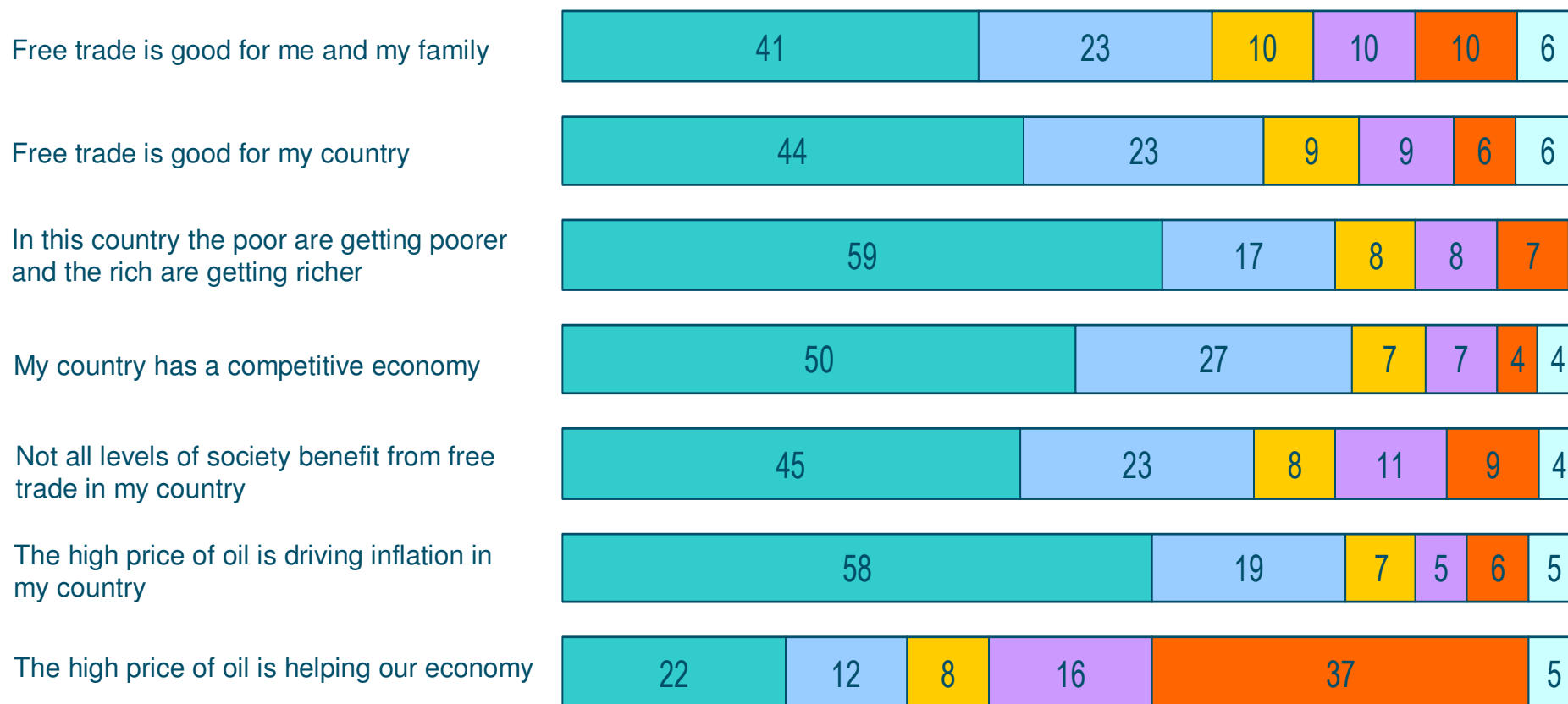
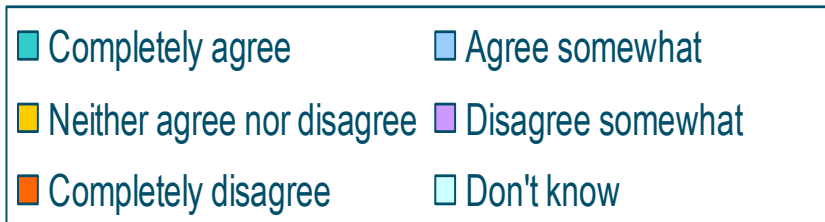
## Have you experienced any of these distressing situations in the past year? (figures in per cent)

	Total
None	61
Been the victim of a crime	13
Been sick and could not afford medical attention	13
Been the victim of discrimination	11
Lost a primary job	11
Had to skip a meal because you did not have money for food	10
Been sick and could not get medical attention	9
Been asked for bribe by a corrupt official	4
Had to accept a pay cut	4



# Attitudes (figures in percent)

## Economy

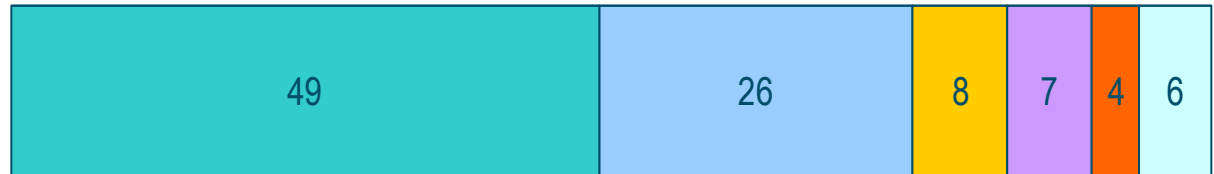




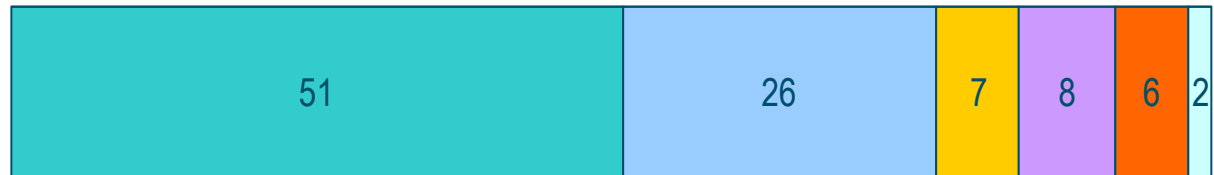
# Attitudes

## Environment

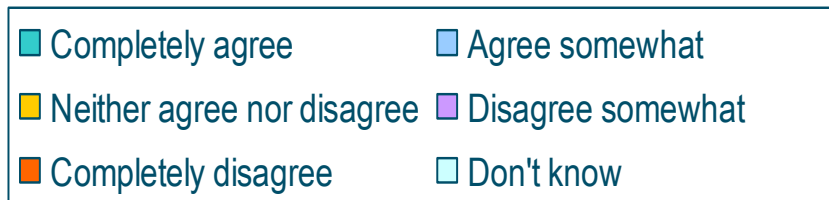
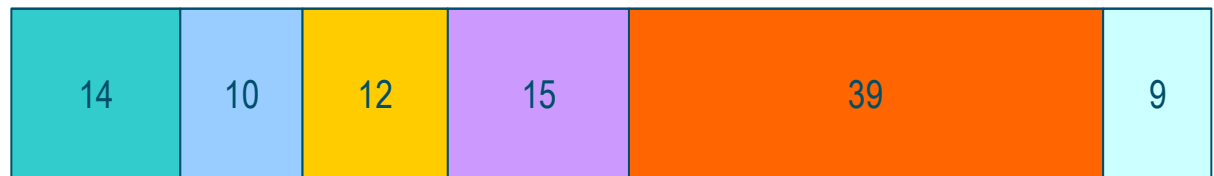
Environment degradation is a Major issue in my country



The environment in my country is too polluted today



There is a good chance that my country will suffer a major natural disaster in the next 12 months



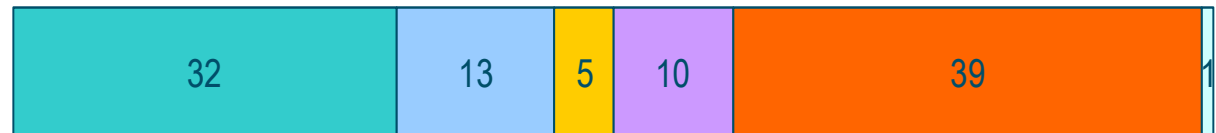
# Attitudes

## Personal

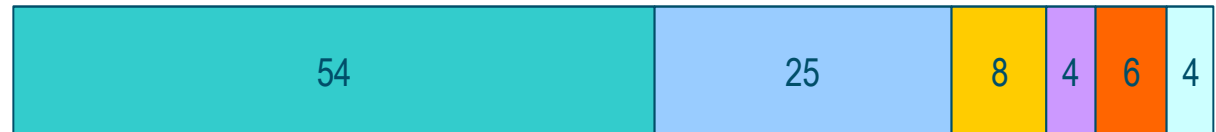
Five years ago things were better for me



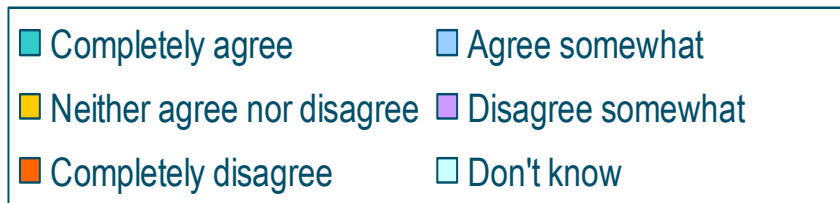
I would like to live and work in another country



In five years time things will have improved for me



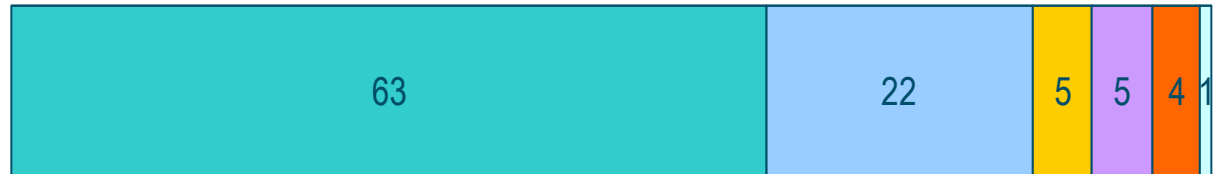
Today life is good to me and my family



# Attitudes

## Social

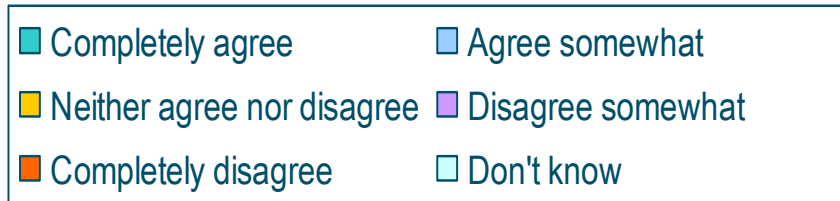
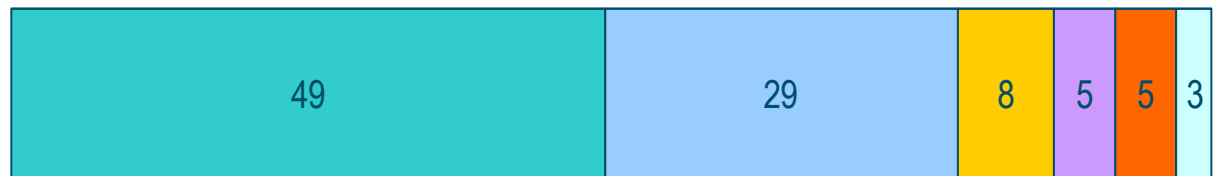
I am proud of what my country has achieved



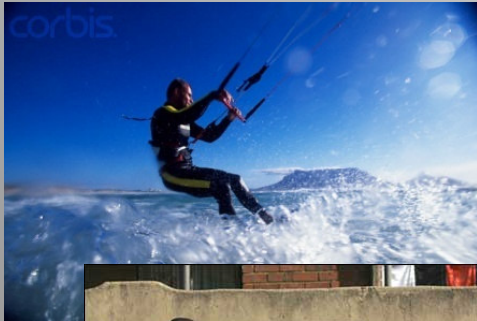
My country has a bright future



My country is innovative



# Bringing lifetolife



Thank you