Publisher Research Council

Mindset battery of statements

Report by InSites Consulting, November 2020

FROM

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InSites Consulting

What's inside?

Content

Background *and objectives*

PRC requested that a ***battery of statements regarding mindsets, attitudes and beliefs*** is asked of an ***online representative South African*** population.

Categories of interest covered:

1) **Values** / motivations / aspirations (family, personal, community)
2) **Lifestyle** / Diet / Health / Exercise
3) **Finances**
4) **Media Trust & Usage**
5) **Digital Specific**
6) **Shopping habits**
7) **Local perceptions**
8) **COVID-19**
9) **Hobbies**

Along with a deeper understanding of the South African population, the significant impact caused by COVID-19 is important to understand in terms of the ***changing consumer landscape*** and to help media and publishers to be at the forefront of ***evolving behavioural patterns.***

In addition, we are also providing a view of ***different personalities*** (based off of the big five personality inventory scale which has been ***adapted for the purposes of this study***).

Ad hoc questions include questions around internet access, device usage, radio listenership, TV viewership, newspapers and magazine readership among others

Content

METHODOLOGY

01 Sample

The sample was constructed to ensure an accurate representation of the PAMS 2019 Online South African population.

RIM weighing was applied in order to represent these proportions.

02 Data Collection

The online sample was recruited from the South African InSites Consulting Digital Research Panel.

Data was collected between 8 – 21 October 2020.

03 Outcomes

975 Total sample

Small sample size warnings

Sample sizes below 50 should be interpreted with caution:
(*) indicates a sample size between 30 and 50 (small sample).
(**) indicates a sample size below 30 (very small sample).

WEIGHTING (COLLAPSED*) – TARGET WEIGHTS BASED ON 2019 PAMS ONLINE UNIVERSE

A RIM weighting methodology was applied to control for all variables included as weights targets. The PAMS

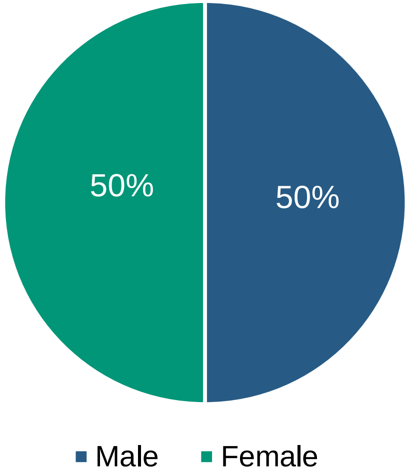
	Ideal sample	Target		Achieved		
		Count	%	Count	%	Weight applied
Area type	Metro	600	60%	589	60%	0,993
	Non-Metro	400	40%	386	40%	1,010
Province	Gauteng	311	31%	342	35%	0,887
	KwaZulu-Natal	184	18%	140	14%	1,281
	Western Cape	143	14%	169	17%	0,825
	Other (EC, FS, LP, MP, NW, NC)	362	36%	324	34%	1,075
Age	16 - 24	230	23%	187	19%	1,199
	25 - 34	270	27%	284	29%	0,927
	35 - 49	290	29%	298	31%	0,949
	50+	210	21%	206	21%	0,994
Gender	Male	500	50%	478	49%	1,020
	Female	500	50%	497	51%	0,981
Race	Black	600	60%	613	63%	0,954
	WCI	400	40%	362	37%	1,077
Income	R1 - R9 999 - HH Income - grouped	404	40%	358	37%	1,100
	R10 000 - R19 999 - HH Income - grouped	243	24%	254	26%	0,933
	R20 000 - R39 999 - HH Income - grouped	214	21%	231	24%	0,903
	R40 000 - R59 999 - HH Income - grouped	95	10%	90	9%	1,029
	R60 000 +	44	4%	42	4%	1,021
	Total	*1000*	*100%*	*975*	*100%*	*All < 2*

Detailed respondent-level weights and targets contained in full data file

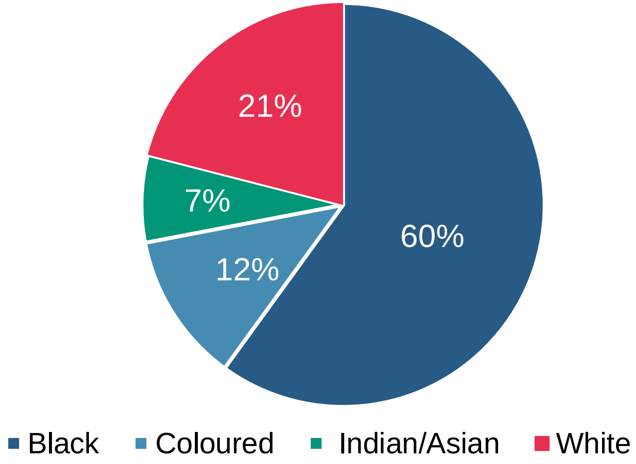
Content

SAMPLE *profile* | OVERALL

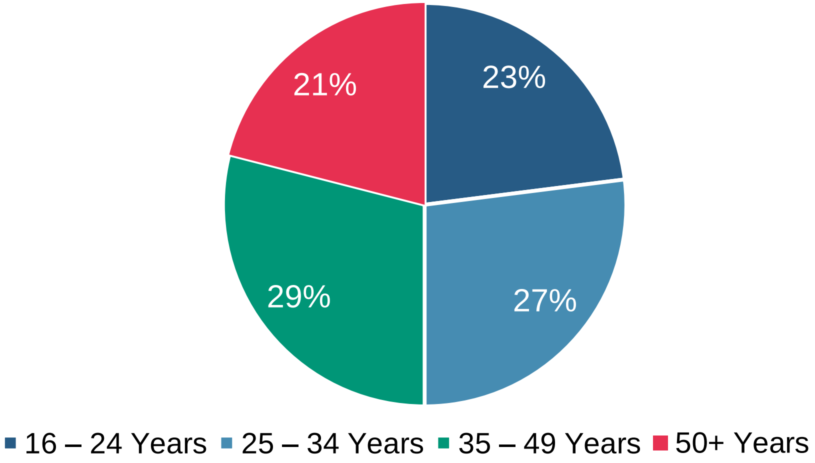
Gender



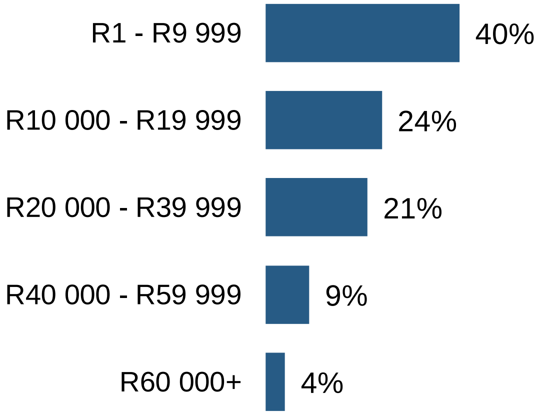
Race



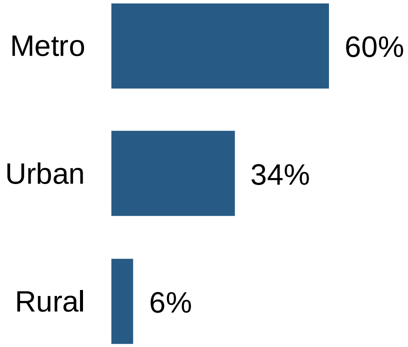
Age



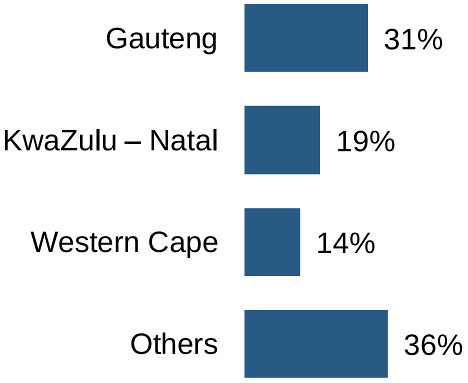
Household Income



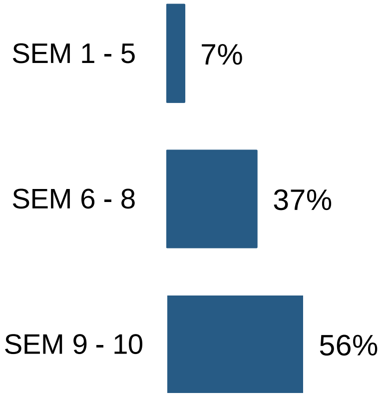
Metro / Urban / Rural



Province



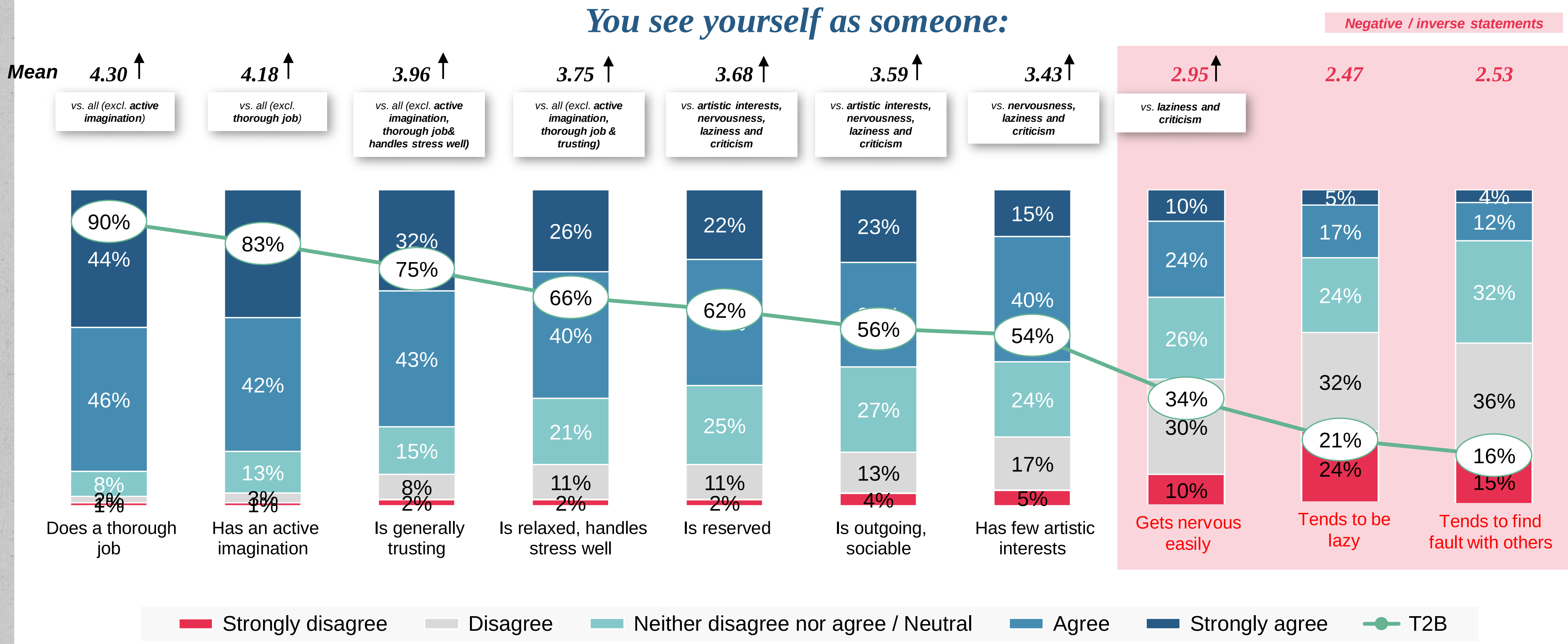
SEM



Q1. Please indicate your age. Q2. Are you ... ? Q3. Please indicate your race. Q4. HHI . Q5. Metro/Urban/Rural split . Q6. In which province do you live? SEM; n=975

Content

CONSUMERS SEE THEMSELVES AS SOMEONE WHO DOES A THOROUGH JOB, HAS AN ACTIVE IMAGINATION AND IS GENERALLY TRUSTING

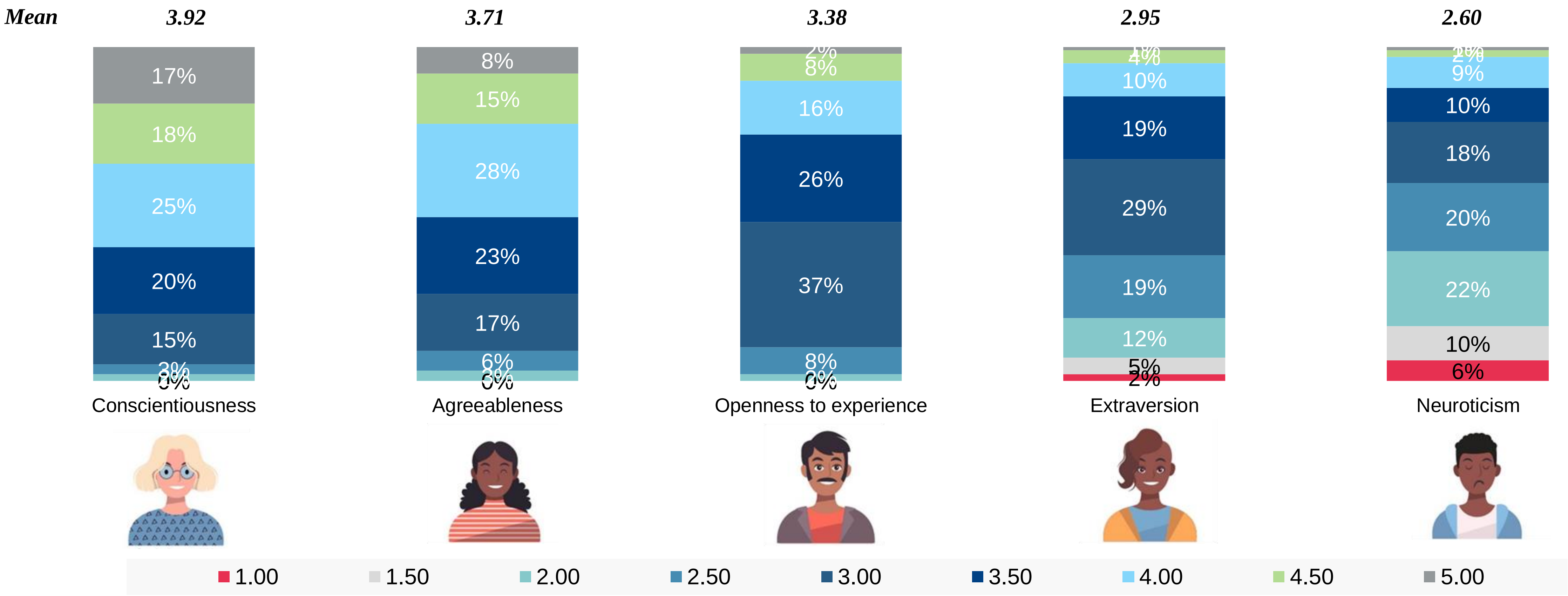


Q9: You see yourself as someone who: n=975

↑ ↓ *Significantly higher or lower between statements (mean score only)*

IN TERMS OF THE BIG FIVE PERSONAS, WE SEE THE HIGHEST CLUSTERING FOR CONSCIENTIOUSNESS AND THE LOWEST FOR NEUROTICISM *(SEGMENTATION TO FOLLOW)*

You see yourself as someone:



Q9: You see yourself as someone who: n=975

Note: The "Big Five" traits (extroversion, neuroticism, openness, conscientiousness and agreeableness) emerged in the 1940s through studies of the English language for descriptive terms. Those categories were validated in the 1990s as a scientifically backed way to evaluate a person's character.

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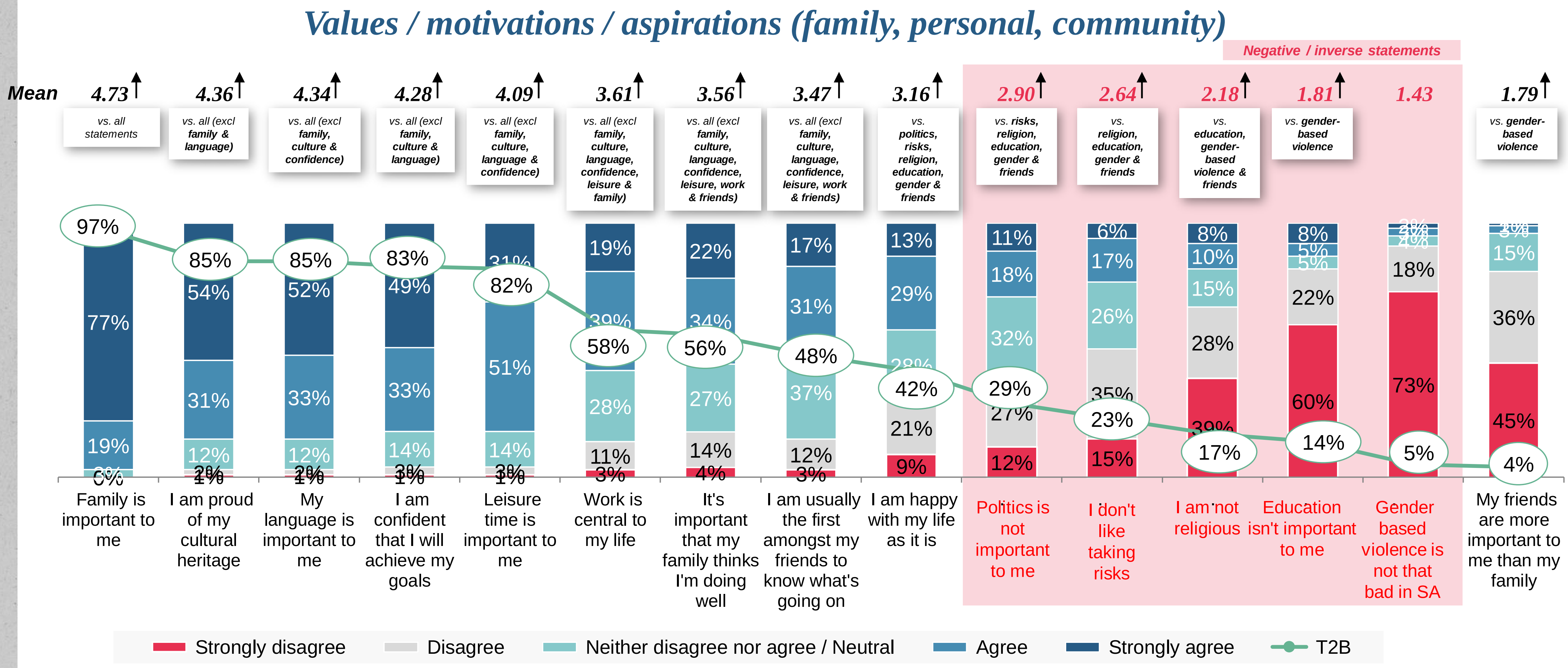
Values, Motivations, Aspirations

SOUTH AFRICANS ARE PROUD OF THEIR CULTURAL HERITAGE, AND EXPRESS THE IMPORTANCE OF FAMILY, LANGUAGE AND LEISURE TIME

More than two thirds of South Africans consider themselves religious and emphasize the importance of education.



Q10: Values / motivations / aspirations (family, personal, community): n=975

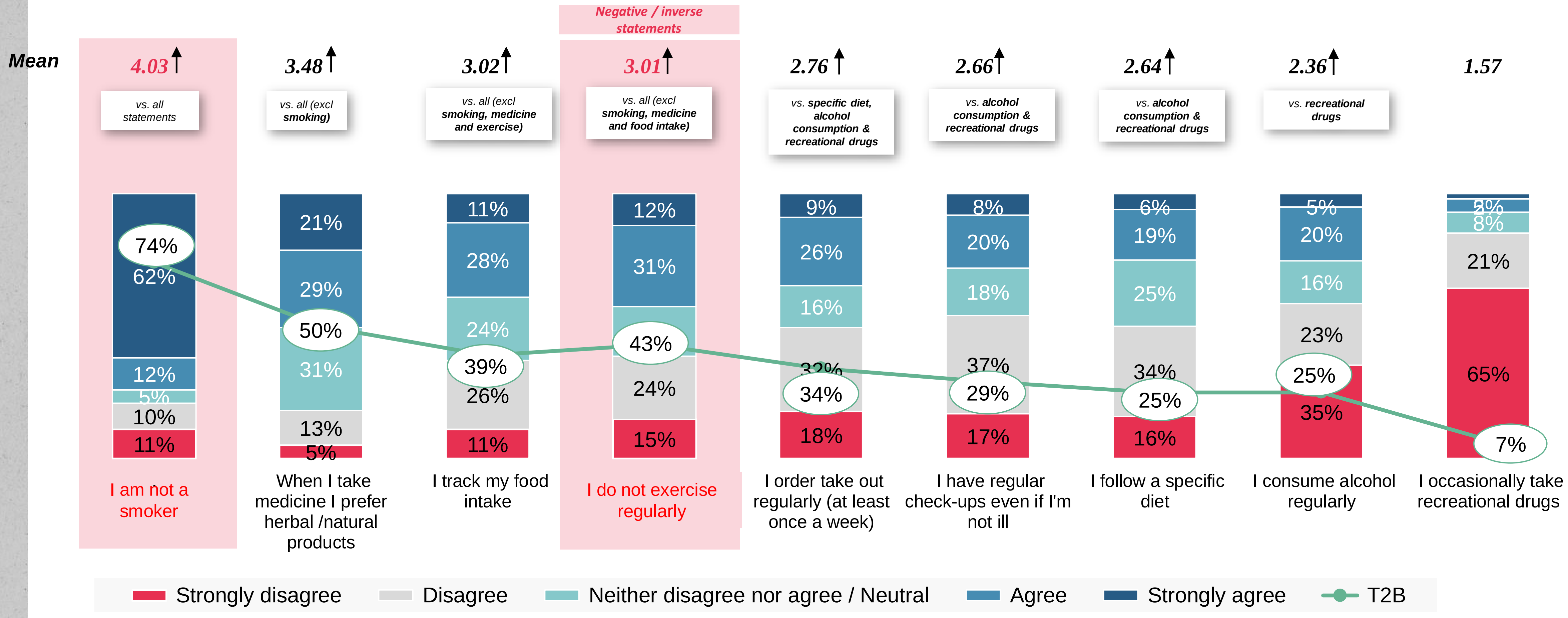
↑ ↓ *Significantly higher or lower between statements (mean score only)*

Lifestyle, Diet, Health, Exercise

3 IN 4 SOUTH AFRICANS CLAIM TO BE NON-SMOKERS, WHILE 7% SAY THAT THEY OCCASIONALLY TAKE RECREATIONAL DRUGS

More than one third of consumers track food intake and half prefer herbal / natural remedies over prescription medication.

Lifestyle / Diet / Health / Exercise



Q11: Lifestyle / Diet / Health / Exercise: n=975

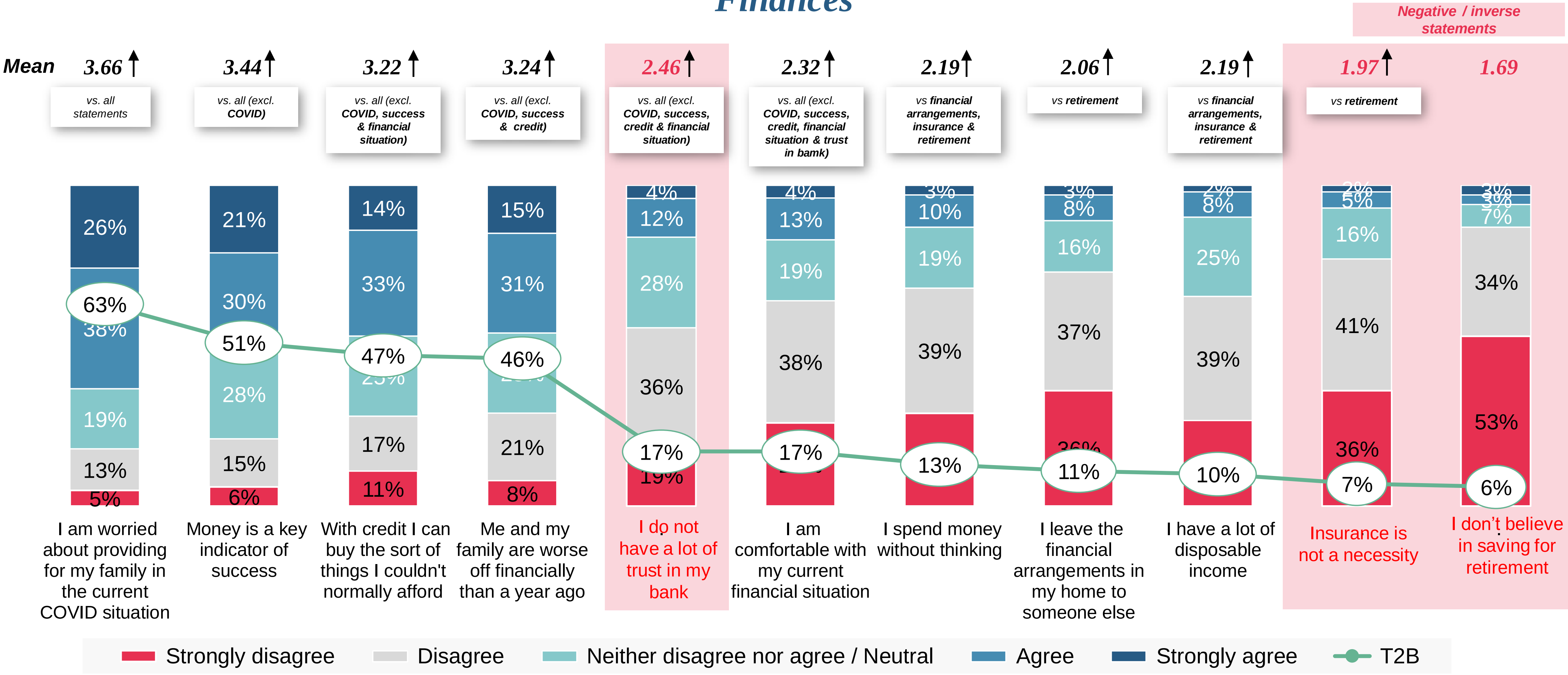
↑ ↓ *Significantly higher or lower between statements (mean score only)*

Finances

MONEY IS TIGHT – A SENTIMENT ECHOED BY NEARLY 2 IN 3 CONSUMERS - WHO ARE WORRIED ABOUT PROVIDING FOR THEIR FAMILIES DURING COVID

Almost half of consumers agree that with credit they can buy the sort of things that they could not normally afford, and only 1 in 5 are comfortable with their current financial situation.

Finances



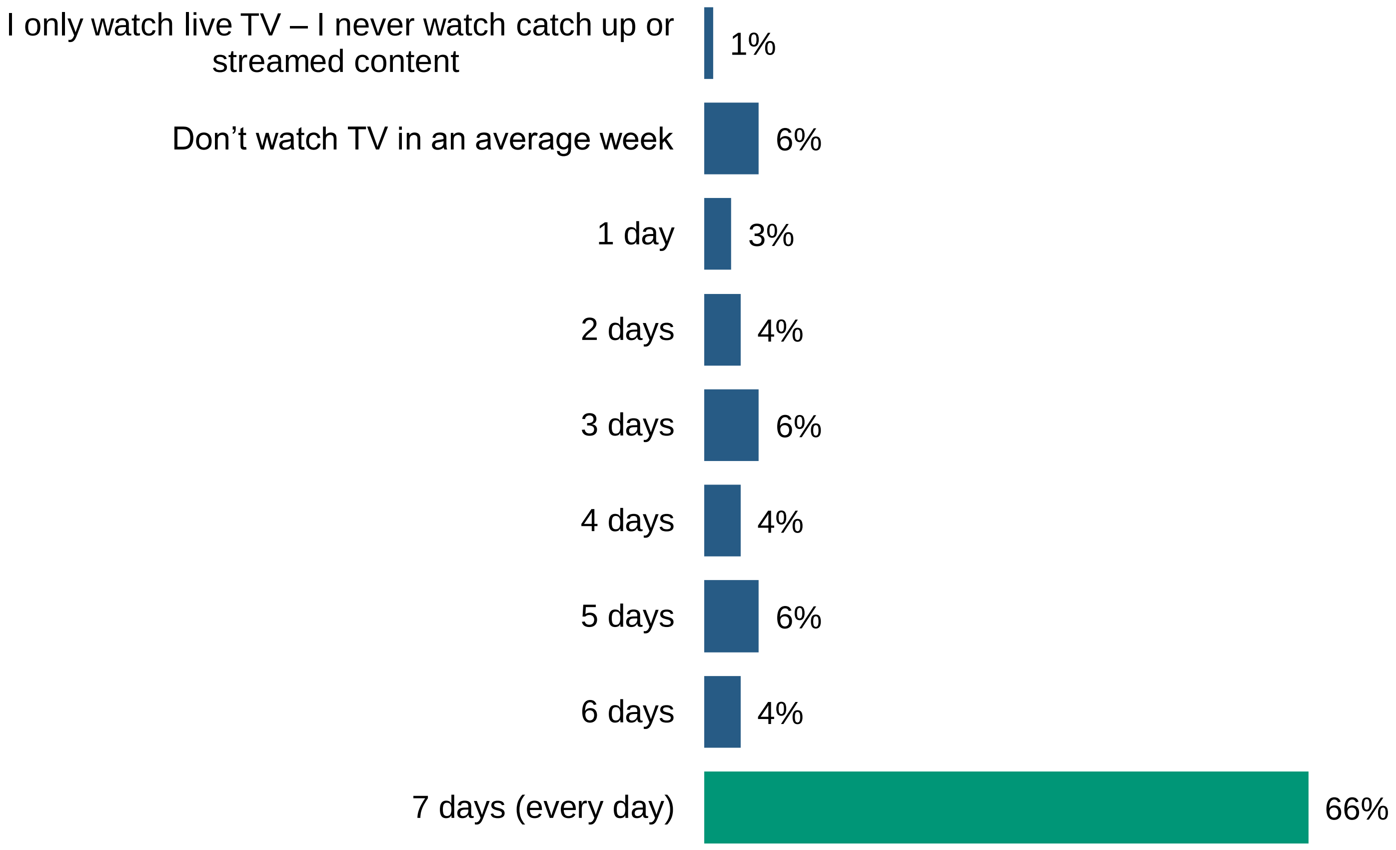
Q12: Finances: n=975

↑ ↓ *Significantly higher or lower between statements (mean score only)*

Media Usage and Trust

TWO THIRDS OF SOUTH AFRICANS WATCH TV EVERY DAY OF THE WEEK, INCLUDING WEEKENDS (IN AN AVERAGE WEEK)

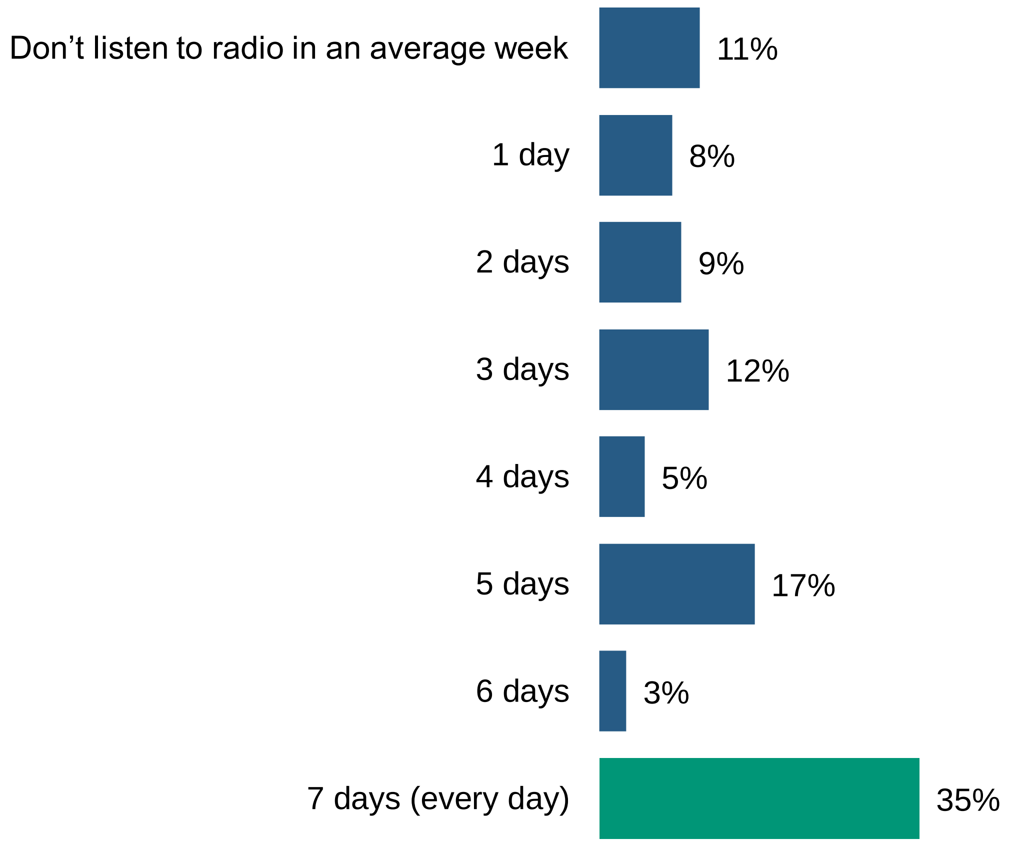
Days TV watched (in an average week)



Q23 - During an average week, on how many days you watch TV?; n = 975

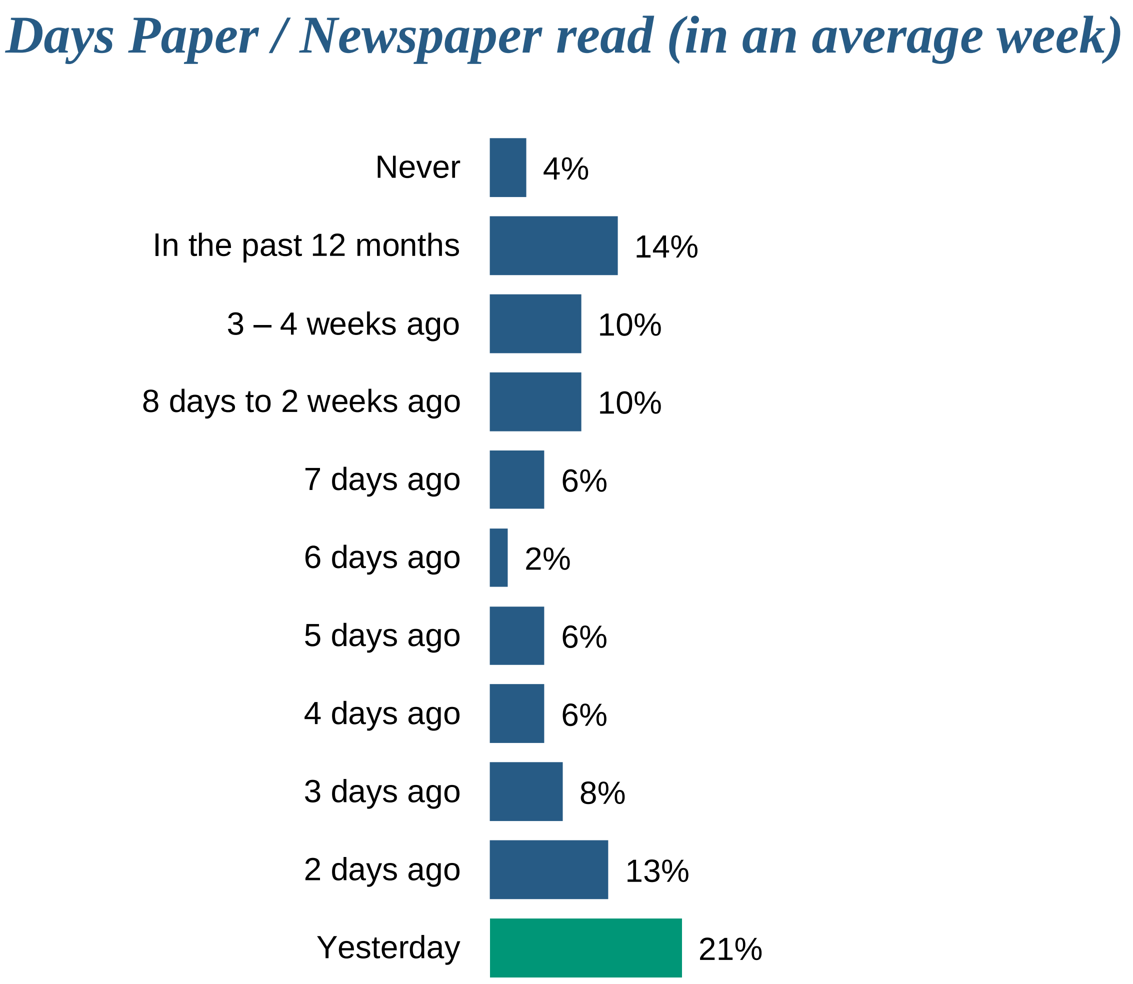
WHILE FOR RADIO, ONLY ONE THIRD OF SOUTH AFRICANS LISTEN EVERY DAY OF THE WEEK, INCLUDING WEEKENDS (IN AN AVERAGE WEEK)

Days listened to RADIO (in an average week)



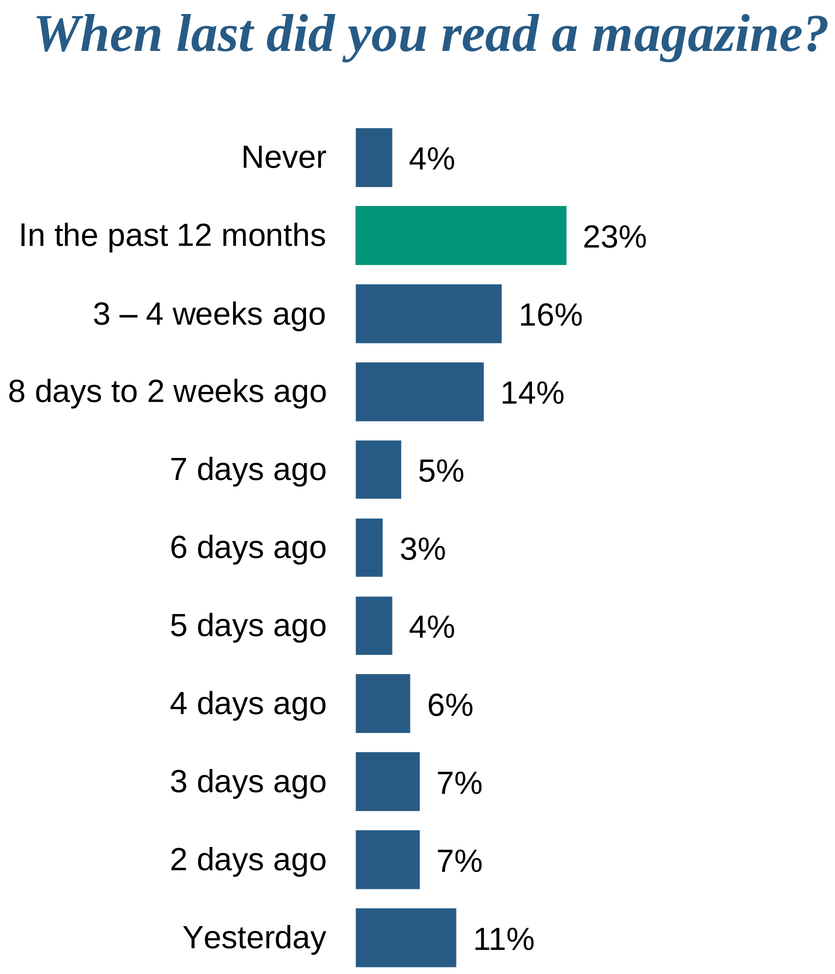
Q22 - During an average week, on how many days you listen to the Radio?; n = 975

FOR NEWSPAPER READERSHIP, 3 IN 5 CLAIM TO HAVE READ A NEWSPAPER IN THE PAST WEEK



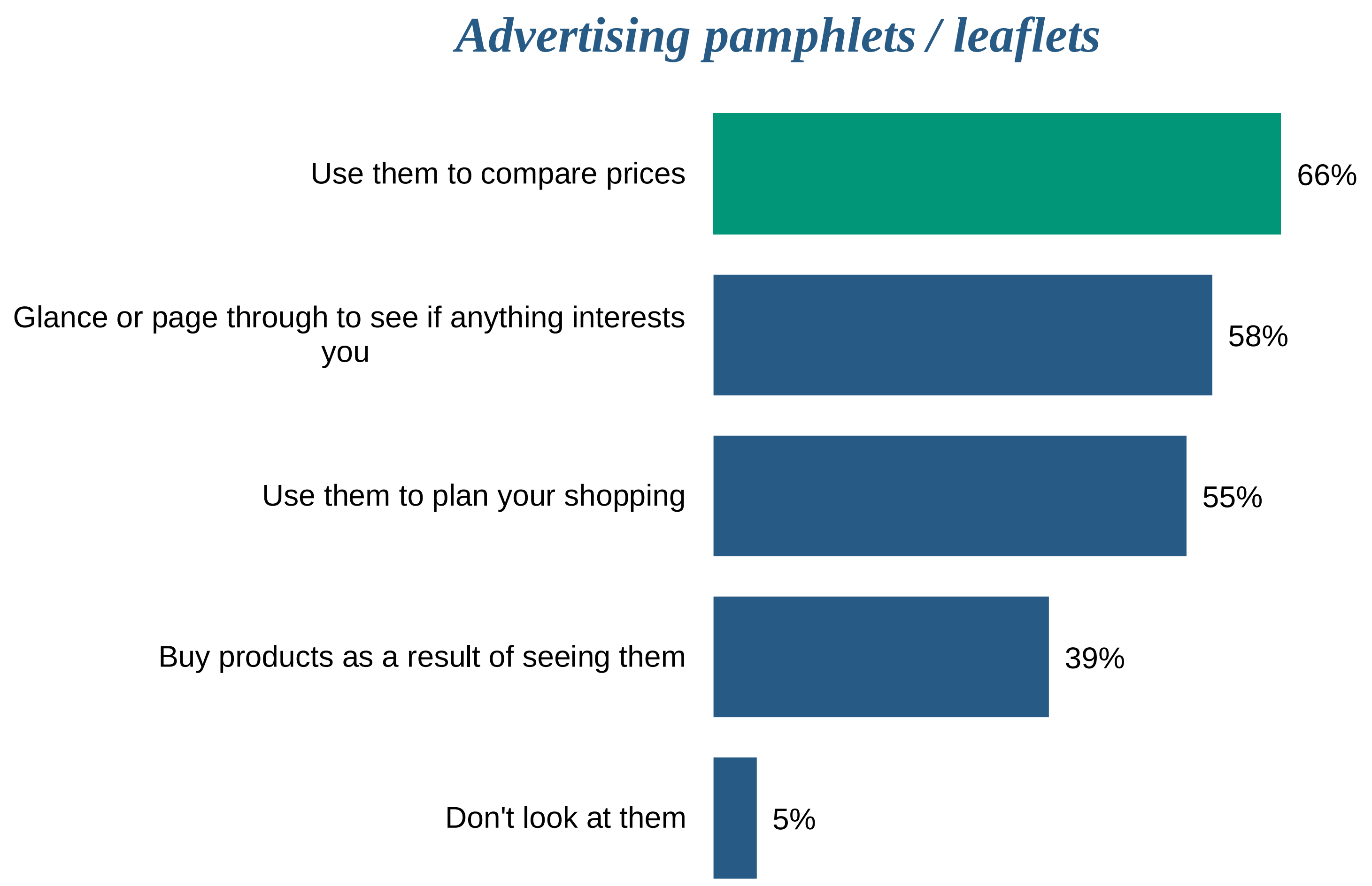
Q24 - Excluding today, when last did you read a paper or a copy of a newspaper?; n = 975

MAGAZINE READERSHIP RECEIVES LESS MENTIONS AS COMPARED TO OTHER MEDIUMS – WITH 23% MENTIONING HAVING READ ONE IN THE PAST 12 MONTHS



Q25 - Excluding today, when last did you read a magazine?; n = 975

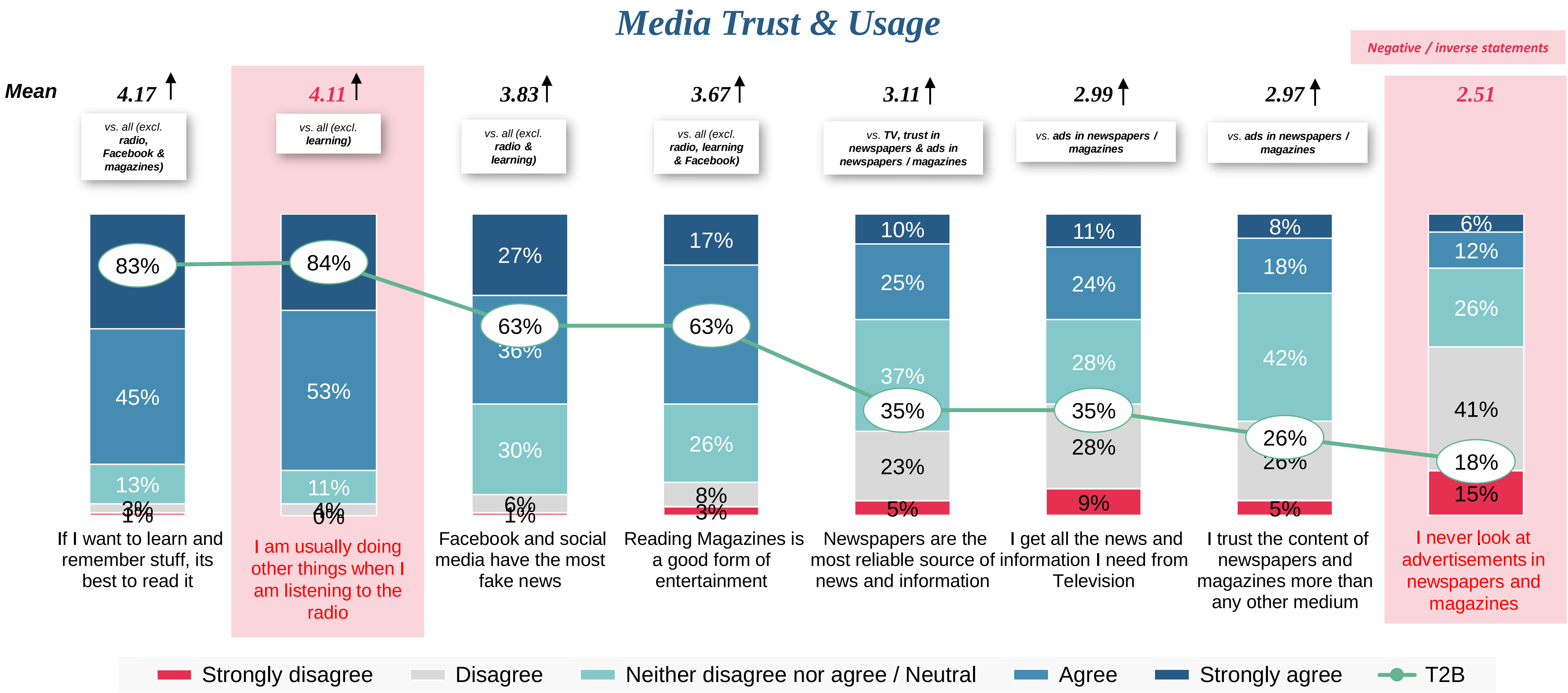
TWO THIRDS OF CONSUMERS USE PAMPHLETS / LEAFLETS TO COMPARE PRICES



Q19 - Thinking about advertising pamphlets, leaflets or inserts such as these, do you…?; n = 975

ONE THIRD OF CONSUMERS AGREE THAT NEWSPAPERS ARE THE MOST RELIABLE SOURCE OF NEWS AND INFORMATION

Most consumers (84%) report doing something else when listening to the radio.



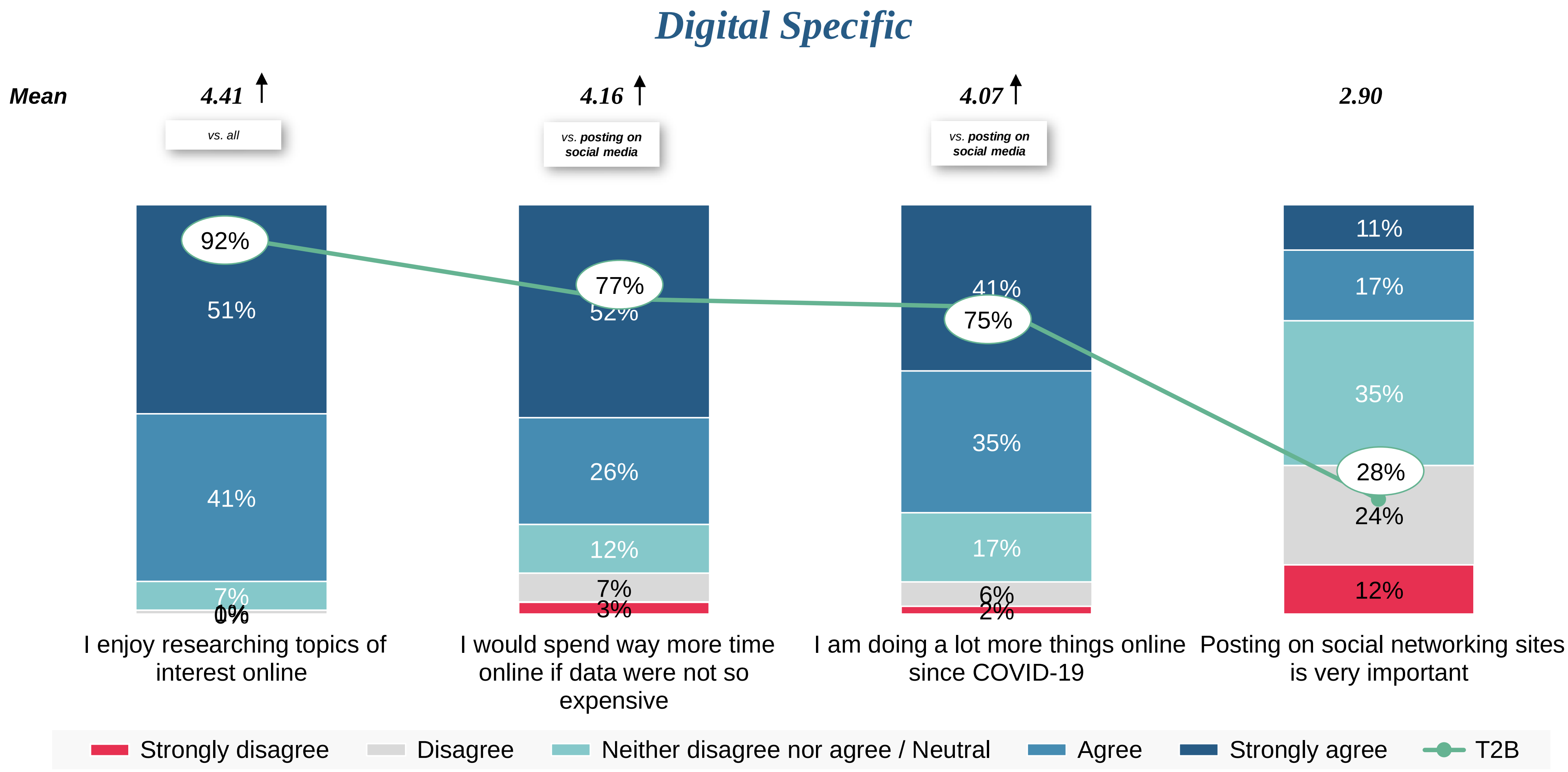
Q13: Media Trust & Usage: n=975

↑ ↓ *Significantly higher or lower between statements (mean score only)*

Digital

THERE IS HIGH TRACTION OF ONLINE RESEARCH, BUT LIMITATIONS TO ACCESS BASED ON THE COST OF DATA

75% claim to be doing a lot more online as a result of COVID-19.



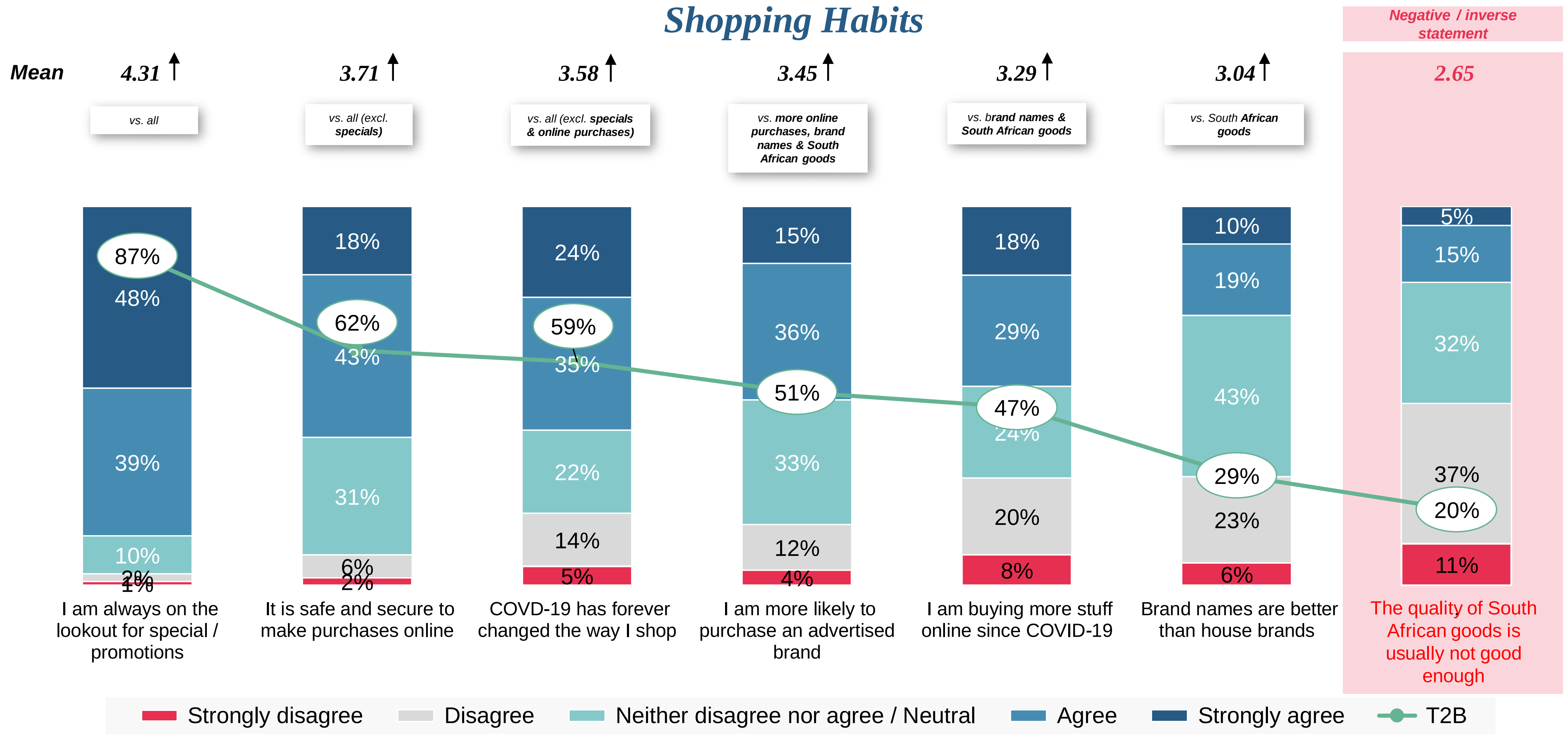
Q14: Digital Specific: n=975

↑ ↓ *Significantly higher or lower between statements (mean score only)*

Shopping Habits

CONSUMERS ARE ON THE LOOKOUT FOR SPECIALS AND PROMOTIONS WITH CLOSE TO HALF REPORTING INCREASED ONLINE SHOPPING AS A RESULT OF COVID-19

Opinions about brands are more divided with a third or more showing neutrality when it comes to the importance of brand names (vs house brands) and the quality of South African brands (vs international brands).



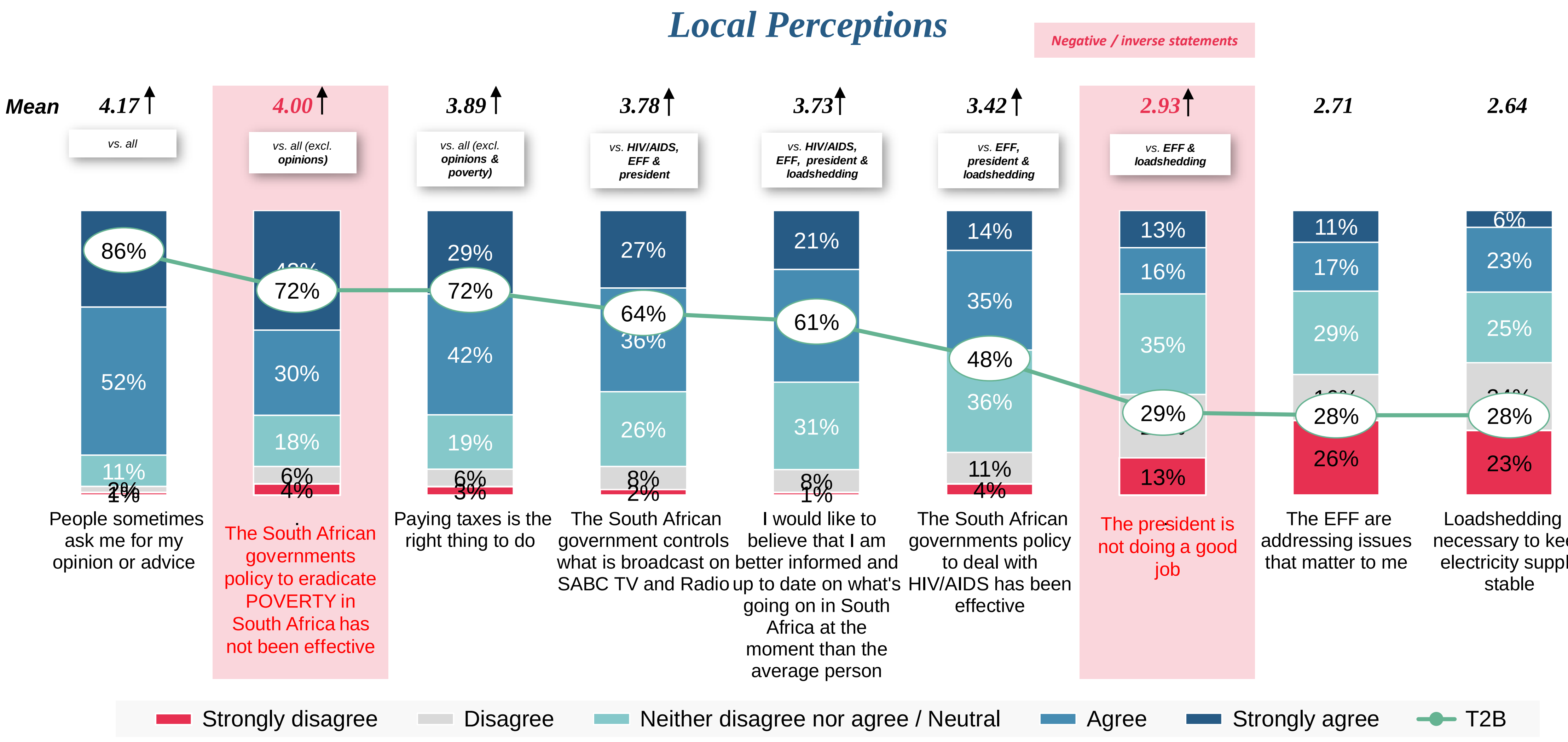
Q15: Shopping Habits: n=975

↑ ↓ *Significantly higher or lower between statements (mean score only)*

Local Perceptions

WHILE SOUTH AFRICANS ARE DIVIDED ON MANY ISSUES, MOST AGREE THAT THE GOVERNMENT IS NOT DOING ENOUGH TO ERADICATE POVERTY IN THE COUNTRY

Two thirds of consumers agree that the government controls what is broadcast on SABC TV and radio.

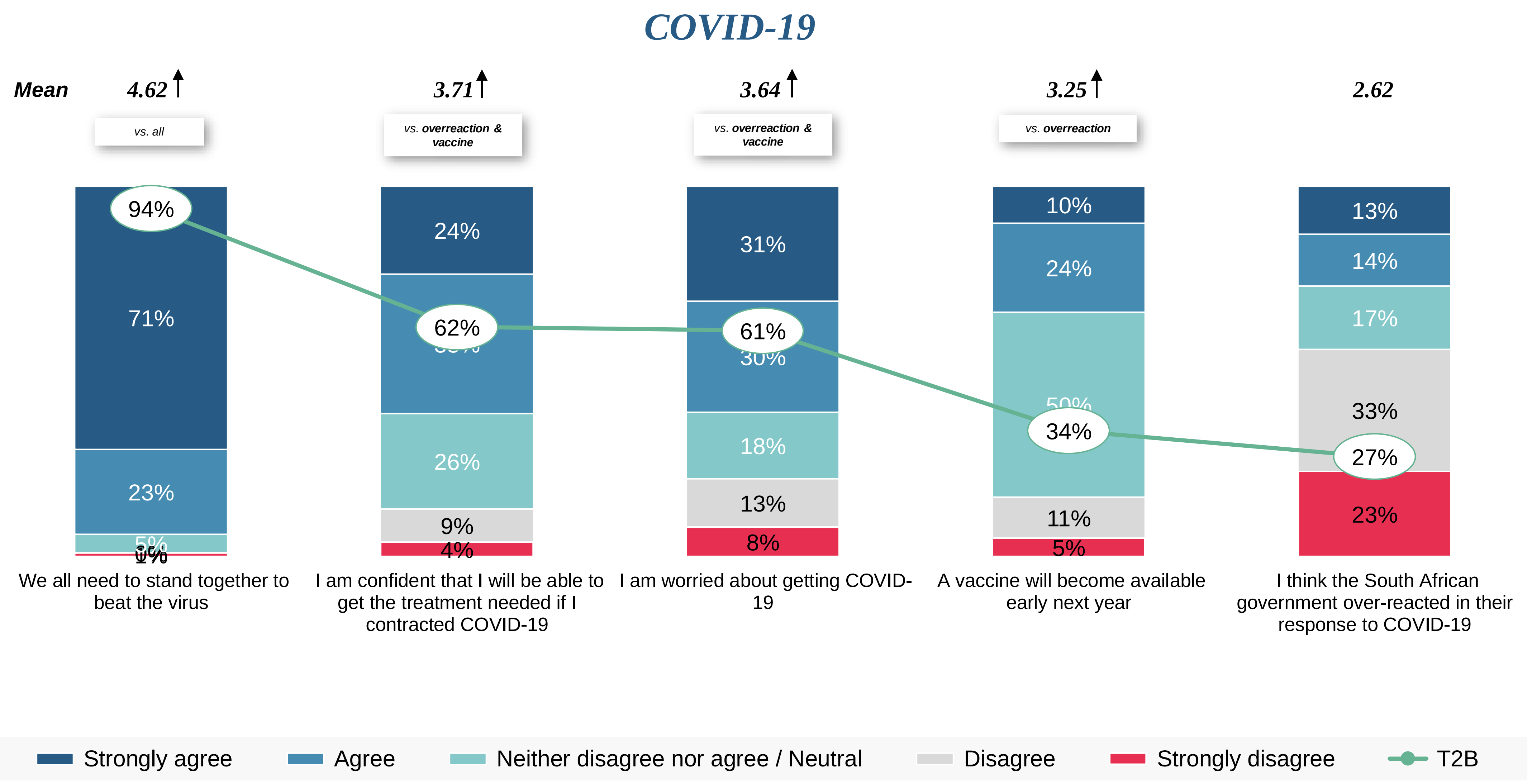


Q16: Local Perceptions: n=975

Significantly higher or lower between statements (mean score only)

COVID-19

SOUTH AFRICANS SHOW UNITY IN THE FIGHT AGAINST COVID-19, WHILE 27% CLAIM THAT THE GOVERNMENT OVER-REACTED IN THEIR RESPONSE TO THE PANDEMIC

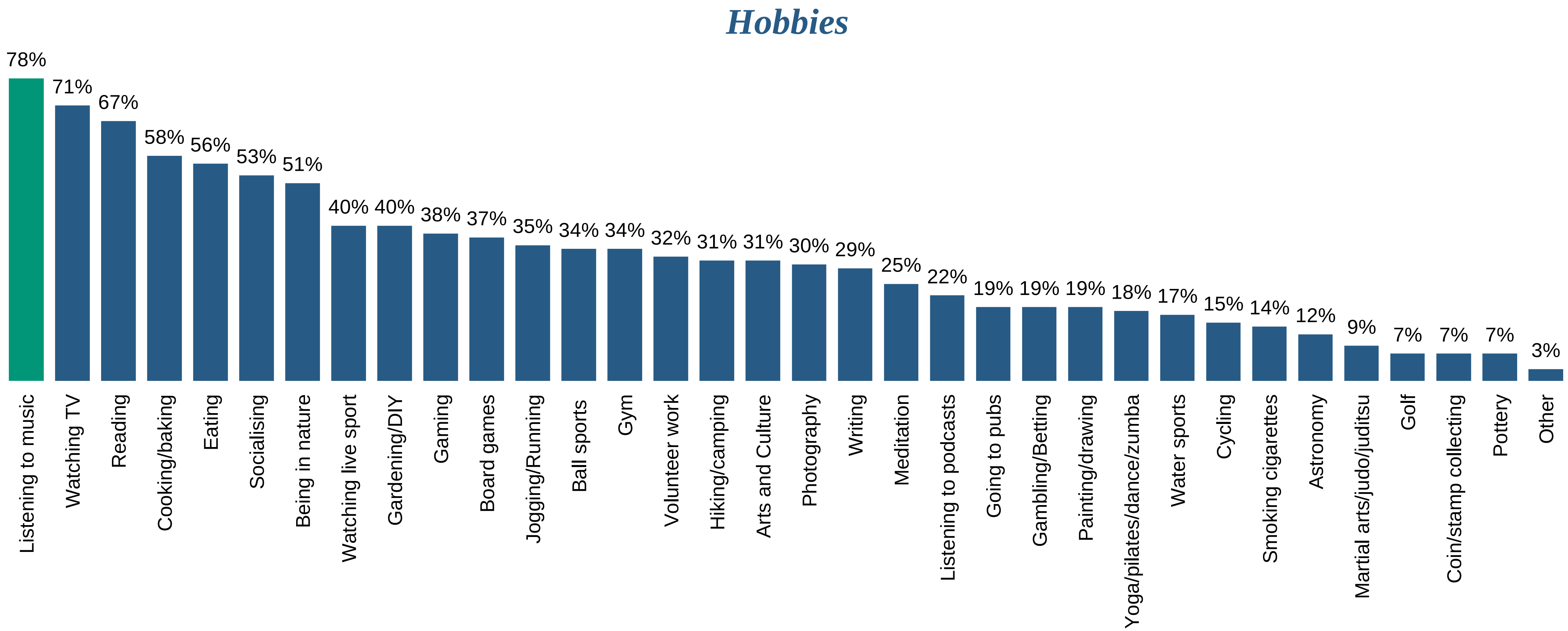


Q17: COVID-19: n=975

↑ ↓ *Significantly higher or lower between statements (mean score only)*

Hobbies

SOUTH AFRICANS HAVE A VARIETY OF HOBBIES – WITH MUSIC, WATCHING TV, READING, COOKING/BAKING, EATING AND SOCIALISING BEING MOST MENTIONED



Q18 - We'd like to know what kind of hobbies you're interested in. Please select all options that apply; n = 975

Content

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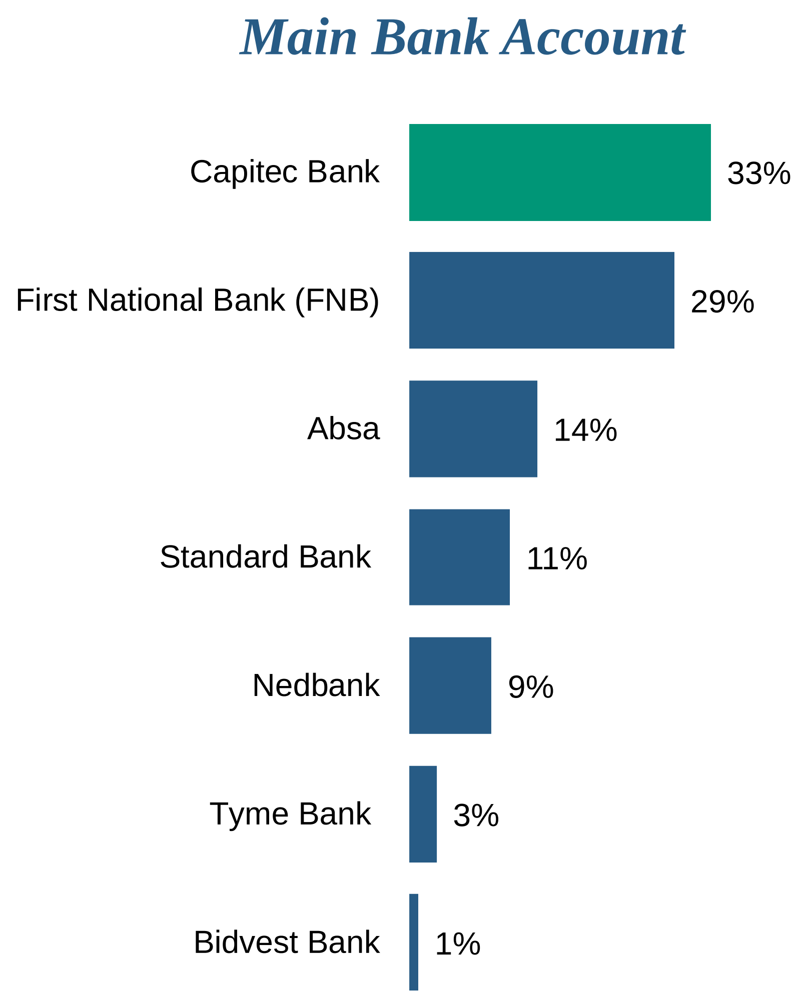
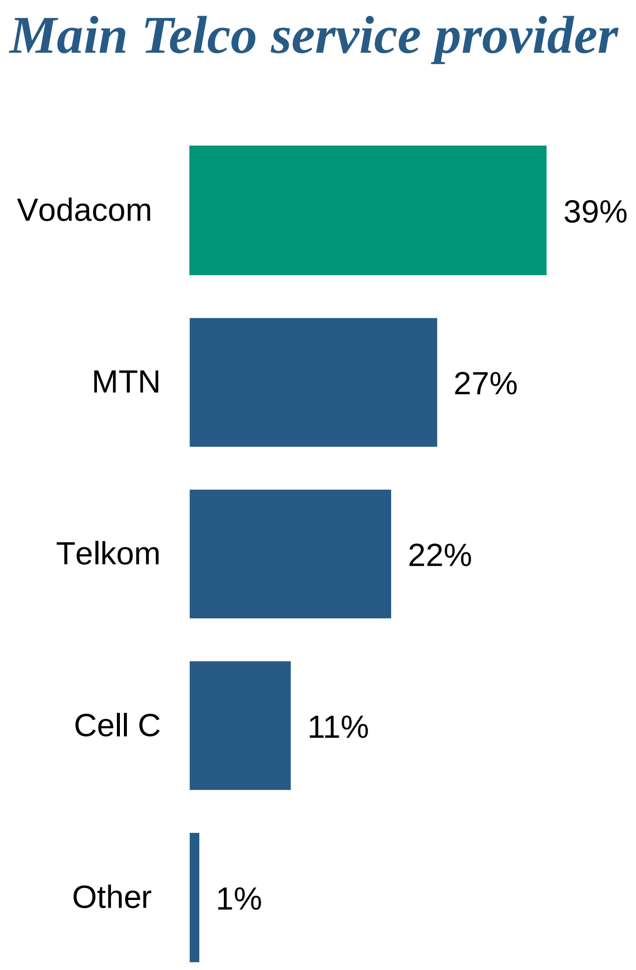
A THIRD OF CONSUMERS' MAIN BANK ACCOUNT IS WITH CAPITEC BANK, FOLLOWED BY FNB AND ABSA



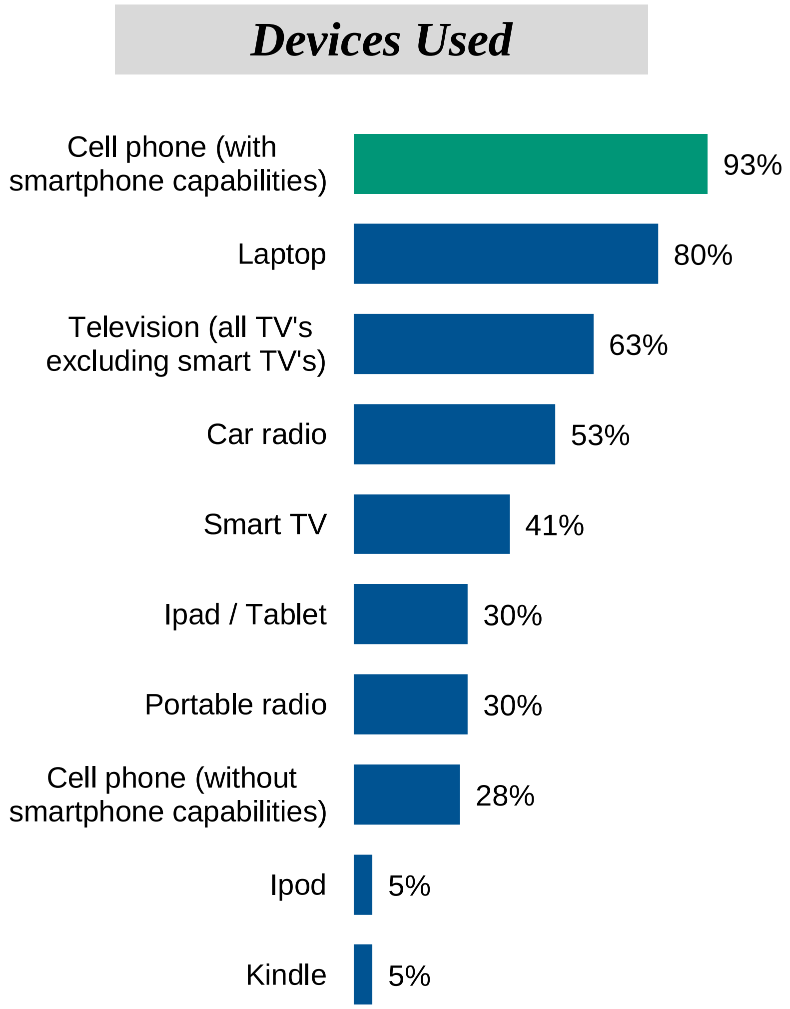
Q7. Who is your main bank account with?; n=975

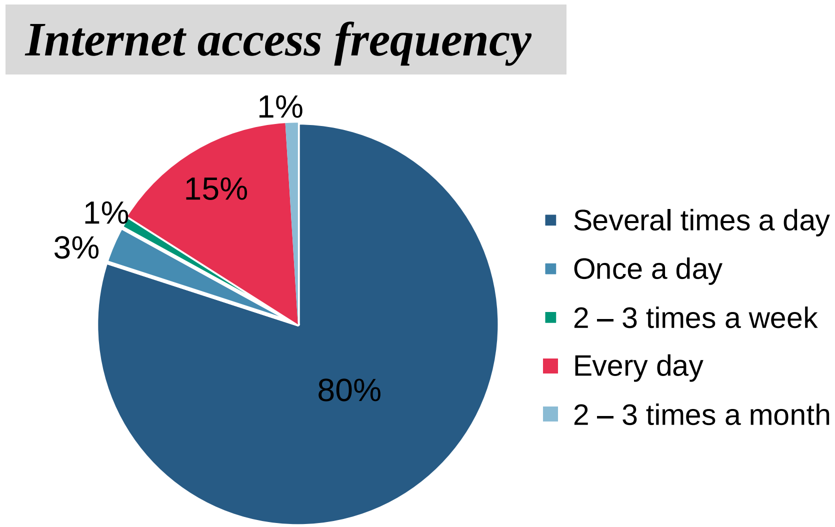
MORE THAN A THIRD OF CONSUMERS ARE VODACOM SUBSCRIBERS, AND ALONG WITH MTN AND TELKOM, MAKE UP 88% MARKET SHARE

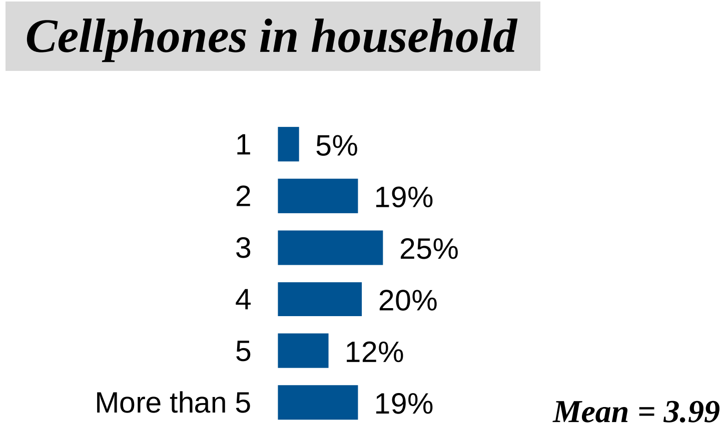


Q8. Who is your main telco service provider for your cellphone?; n = 975

ALMOST ALL CONSUMERS HAVE ACCESS TO A SMARTPHONE, AND 80% ACCESS THE INTERNET SEVERAL TIMES A DAY







Q26. How often do you access the internet? Q20. What devices do you make use of / have access to? Q21. How many cell phones are there in your household?; n=975

Content

CONCLUSIONS

Values / motivations / aspirations (family, personal, community):
South Africans are proud of their cultural heritage and are motivated / inspired by family. The importance of language is emphasized by most (85%). While work is central to some (58%), this is second to family (mentioned by 97% of respondents)

***Lifestyle / Diet / Health / Exercise*:**
More than a third of consumers track food intake and exercise regularly, while 1 in 4 South Africans report smoking and 7% reporting occasional drug use

Finances:
COVID-19 has left two thirds of South Africans worried about providing for their families. Half of consumers feel that money is a key indicator of success.

Media Usage & Trust:
Only one third of South Africans listen to the radio every day of the week, including weekends (in an average week)

For newspaper readership, only 1 out of 5 claim to have read a paper or copy of a newspaper the day before

Magazine readership receives less mentions as compared to other mediums – with 23% mentioning having read one in the past 12 months

Two thirds of consumers agree that Facebook and other social media platforms have the most fake news, and one third of consumers agree that newspapers are the most reliable source of news and information

CONCLUSIONS | *Continued*

Digital Specific:
Consumers would spend more time online if data were not so expensive, and 3 out of 4 claim to be doing a lot more online as a result of COVID-19

***Shopping* habits:**
Most consumers (87%) are on the lookout for specials / promotions and online shopping is on the rise as a result of the impact of COVID-19

Local perceptions:
Opinions are more divided on politics, with a third of respondents displaying feelings of indifference towards the job that the president is doing, and political parties such as the EFF addressing issues that matter to them. Despite this indifference, South Africans are united in believing the government is not doing enough to eradicate poverty.

COVID-19:
Most (94%) are united in the belief that everyone should stand together to beat the virus

Hobbies:
South Africans have a variety of hobbies – with music, watching TV, reading, cooking/baking, eating and socialising being most mentioned

Thank you!