

MSRA Newsletter



MARKETING & SOCIAL RESEARCH ASSOCIATION

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MSRA 2014 CALENDAR

GfK Verein/MSRA Accreditation Training - Feb 2014

MSRA Celebrity Talk - Mar/April 2014

MSRA Basic & Advanced Training - TBC

MSRA 2014 Annual Conference - 23rd May 2014

MSRA 2014 Fun Day - TBC

Message From Chair

MSRA's future

In 2013, MSRA conducted a member survey and a strategy workshop to set the targets for the future of the association. The reports from both challenged the MSRA council, the board and the members to be more active and more ambitious. MSRA should strive to add more and more value to its members. This can be done in many ways: capacity building, political lobbying, the organisation of informative and fun events, a growing conference, realizing the East African scope, sharing information, and building partnerships.

In January 2014, representatives of all member agencies have personally taken on the responsibility to contribute to the future of MSRA. Each member has taken personal responsibility for a specific aspect of MSRA and defined milestones to be achieved. Because there were more goals in the membership survey and the vision document than could realistically be achieved, we also had to park some ambitions. This setting of priorities will enable us to focus on a way forward where we consider it most urgent and where we have the strongest commitment from the council and the members. We are already seeing the first results of this new approach. We were able to respond rapidly to a threatening legislation, we already had a celebrity talk and several trainings in 2014 and a mountain trip up Kilimanjaro is in the planning.

I, and the entire MSRA board, highly appreciate the commitment and enthusiasm from the council and the members. Together, we will create a bright future for MSRA and the market research industry in East Africa. I will keep you posted.

Thank you!

Jasper Grosskurth

The Maisha Report

Africa Tunes In: - 90% of Africans let TV run their homes. The Maisha Report profiles them deeper and finds out who exactly they are.

By Consumer Insight.

The future is on TV and Africans are determined not to miss a minute of it. As revealed in the just released Maisha Report, a Pan African urban lifestyle study, TV has become the main rallying point for homes across the continent.

Amongst the countries featured in the online study, South Africa and Nigeria had the highest incidences, at 95pc and 93pc respectively. Ghana and Kenya featured at 91pc and 90pc in that order. When it comes to out-of-home TV viewing, Kenya featured in more places including at work, public places and at school. For the others, Nigerians favoured work place as second to home; Ghanaians had school. Overall, more than half of those polled said TV was one of their top leisure time activities.

At this point, many would call it a media revolution, or a 'triumph of TV', and they wouldn't be wrong. Until they see what else the Consumer Insight study revealed; the rise and rise of mobile devices as entertainment sources.

Beyond calls and texts, mobile phones have become the ubiquitous choice for entertainment-on-the go. Music was the default choice of free time activity for more than 65pc of respondents across all countries -of these, 78pc used their phones to access it.

Internet browsing featured strongly as a pass time activity as well, and was mobile driven (over 88pc) across Ghana, Nigeria and South Africa. Kenya trailed this slightly, with just 81pc surfing the web on phone. Given the speed of growth and convergence, mobiles are the real revolutionary devices to watch.

Driving this media transformation, the Maisha study found was something just as interesting: the lifestyle of the people staring at those

screens all day. Areas it looked into covered relationships, income and values. Some of the trends are common across the continent, but for others stark differences are seen from country to country. Take South Africa's fast lane couples for example.

When asked if they were single or married, South Africans came out far ahead in preference for coupling (51pc were married compared to the 43pc average). But they are more likely to divorce or separate as well, by a factor of twice the others. Relationships are clearly a quick matter down south.

Ghanaians on the other hand, stood out for their love of church. More than 55pc said they went to Church or Mosque in their free time; with a further 31pc attending religious crusades as well. A no doubt holy crowd. That in contrast, though Kenyans were reasonably religious, they also stood out in having six times the number of disco raves than the Ghanaians and Nigerians.

So if marriage, religion and partying sets each apart, what unites them?

Social media for one. The study found that 64pc of South Africans, 63pc of Nigerians and 60pc of Kenyans spent time chatting on social media. Ghana at 55pc was not too far back as well. 50pc and above seems to be the rule for social networks.

Another common trend is that they are also a busy lot, especially the Nigerians: 35pc of whom don't mind skipping lunch, the most common daytime meal. In contrast, more than 75pc of Kenyans, Ghanaians and South Africans enjoyed that meal; thanks to a lack of time, they can expect no lunch dates from a Nigerian. Overall, about one quarter of -

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those featured across all countries said they did not eat lunch. Compared to the 88pc who never missed dinner and 80pc breakfast, the insight is stunning.

But a usually overlooked reason for skipping meals is forced priorities, due to low incomes. And this in turn is linked to the most troubling trend of all: lack of employment. When asked about employment status – defined as full time job against unemployed or underemployed – every country studied is seen to suffer significantly from a large number of idle people. South Africa does slightly better than the others, but at 45pc unemployed and underemployed is still high. Kenya follows with 52pc and then Nigeria at 56pc. Ghana's with only 40pc employed in full time jobs, makes it the place with fewest number of 'salaried people'.

Growing consumerism only amplifies this

trend more, and is the other side of the job-less-coin.

Far in the lead of the new 'shopping culture' movement are the South Africans, of whom 77pc readily admitted to visiting malls during their free time. Compare that with their 12pc visits to religious crusades and the magnitude becomes clearer. Kenya, with 47pc saying they 'hang-out' in malls, was second (just about equal to the number of those employed in permanent jobs). Nigeria was third in the mall-mad line up, with 37pc and Ghana's 34pc placed it close by as well.

Indeed, put next to the mobile-phone culture, consumerism is seen as one of two powerful influencers of Africa's people and, subsequently, its future. Significant too is the unknown time, place and effect of the merger between these two compelling streams of culture.

As to whether all those hours spent watching TV or with mobile-phones are the cause or the result of changing lifestyles, the Maisha Report can only say that "big changes are underway".

About Maisha Research Study

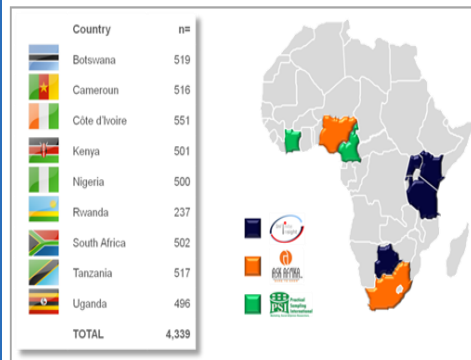
Maisha is Consumer Insight's online proprietary study that reviews various lifestyle trends and viewpoints amongst urban dwellers in African cities. Respondents are drawn from Voices Africa database. Voices Africa is a panel of consumers from different walks of life who have volunteered to be research respondents. Voices Africa has over 80,000 panellists covering all major markets in Africa.

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Attitudes toward Development Aid

By Infinite Insight

In an effort to highlight our network capabilities, INFINITE INSIGHT (Kenya), ASK AFIKA (South Africa) and PRACTICAL SAMPLING INTERNATIONAL (Nigeria) teamed up to carry out a self-sponsored multi-country opinion poll. The coverage and sample size were as follows:



Fieldwork across the 9 countries was carried out in November/December 2013. The questionnaire comprised 10 questions plus standard demographics.

As in recent years there has been a lot of controversy about the benefits of development aid to African countries (e.g. with Kenya's John Githongo emphasising the detrimental effects of development aid), we set out to measure Africans' responses to the various aspects of this debate. Respondents were asked to rate five statements on a 5-point scale; each statement epitomised a particular point of view on the merits or demerits of development aid.

The following chart lists these statements and depicts the results of a segmentation analysis carried out on the data:

	Rotated Component Matrix		
	Component		
	1	2	3
Development aid disenfranchises African countries; aid is always tied to demands on how to run the country	0.842	0.112	0.025
As long as rich countries continue giving aid, there is no incentive for African countries to solve their own problems	0.744	0.142	0.205
Rich countries have a moral obligation to support poor and needy countries in Africa	0.169	0.815	-0.145
The West needs to give development aid to compensate for past wrongs, like slavery and colonialism	0.092	0.786	0.253
Development aid is a waste of money; it promotes corruption and just benefits African politicians	0.167	0.049	0.649

	African Independents	Moralists	Corruption Fighters
	41%	33%	26%

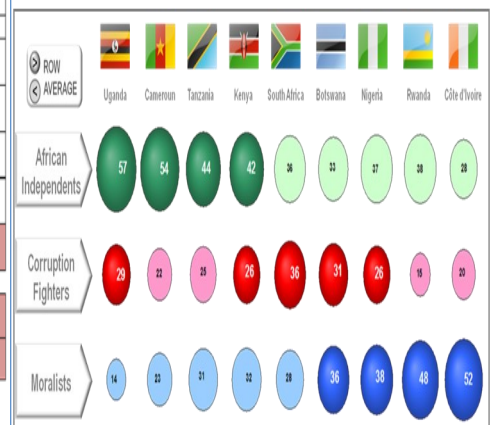
Extraction Method: Principal Component Analysis.
Rotation Method: Varimax with Kaiser Normalization.
Rotation converged in 5 iterations.

Three attitudinal segments resulted from this exercise:

1. The largest segment, with 41% of respondents, were advocates of **African Independence**. In their view, development aid is tied to donors' demands, which curtail independent political decision-making of the recipient countries; development aid is also seen as an obstacle to African countries making an effort to solve their own problems.
2. A third of respondents (33%) across the nine countries embraced a **moral** point of view: there is an obligation for rich countries to support poor countries in Africa; development aid is also seen as compensation for past wrongs, such as slavery and colonialism.
3. 26% of respondents objected to development aid on the grounds that donor money only benefits those in positions of power and, therefore, promotes **corruption** in African countries.

Although each attitudinal segment is represented in all of the covered countries, their respective importance varies from one

country to the next.



With well over half of their populations endorsing the independent position, Uganda and Cameroun come out strongly in favour of rejecting development aid in favour of maintaining their countries' independence. Tanzanians and Kenyans also tended to endorse this point of view.

In contrast, 52% of Ivorians supported the moralist position: development aid was seen as justified compensation and redistribution of wealth. This segment was also the largest in Rwanda, Nigeria and Botswana.

Although Corruption Fighters are minorities in all of the nine countries, 36% of South Africans embraced this position; combined with the same proportion of independence advocates, 7 out of 10 South Africans come out against development aid. Sizeable proportions of respondents in Botswana, Uganda, Kenya and Nigeria also perceived development aid as promoting corruption.