

MSRA NEWSLETTER

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THE ASSOCIATION OF MARKET & SOCIAL RESEARCH PROFESSIONALS

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Africans Response to Kenyan Parliament's Motion to Withdraw from the ICC !

By Infinite Insight Ltd

Following the indictment of President Uhuru Kenyatta and Vice-President William Ruto for their alleged involvement in the 2007/2008 post-election violence, Kenya's parliament passed a motion to withdraw from the Rome Statutes and the ICC in The Hague in September 2013.

Although the motion has yet to be acted upon – Kenya remains a signatory to the Rome Statutes – Kenya actively sought sup-

port from other African nations as well as the AU. To gauge the opinions of Africans themselves, a question was inserted in our first Africa Network survey, conducted by INFINITE INSIGHT, ASK AFRIKA and PRACTICAL SAMPLING INTERNATIONAL.

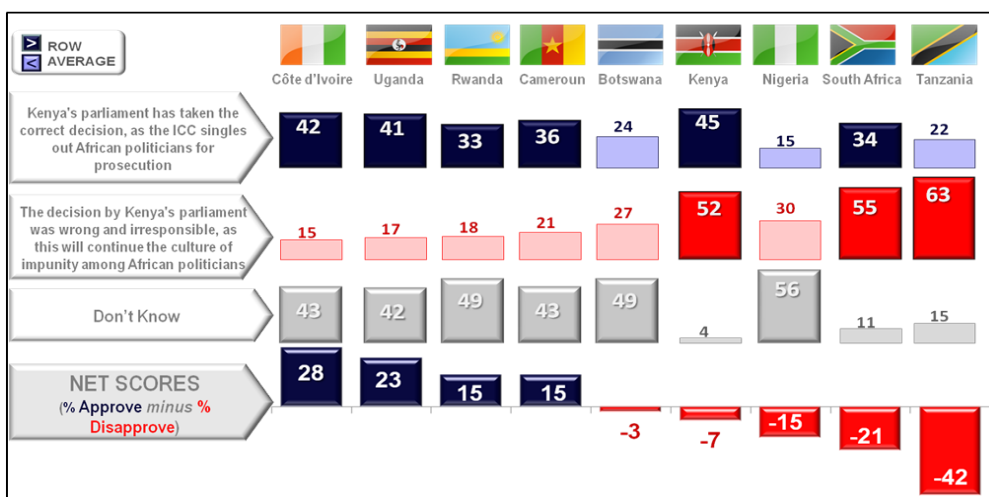
The sample covered over 4,300 respondents in 9 countries across East, West and Southern Africa. The survey was conducted in November and December 2013.

The following chart details responses (%) across countries as well as net scores for approval / disapproval for the motion.

were in support. 55% of South Africans disapproved, with only 34% in support. Tanzanians solidly rejected the motion with 63% opposing it; just 22% approved.

In just four countries (Ivory Coast, Cameroon and Kenya's neighbours, Rwanda and Uganda) did we find more respondents supporting the motion than rejecting it. Across these countries, however, more than 4 out of 10 respondents were indifferent to the motion and did not volunteer an opinion.

Country	n
Botswana	519
Cameroun	516
Côte d'Ivoire	551
Kenya	501
Nigeria	500
Rwanda	237
South Africa	502
Tanzania	517
Uganda	496
TOTAL	4,339



port from other African nations as well as the AU.

To gauge the opinions of Africans themselves, a question was inserted in our first

The most striking result was that in no country was there a majority (50%+) in support of the motion passed by Kenya's parliament – not even in Kenya. 52% of Kenyan respondents rejected the motion; 45%

The survey demonstrates that the ICC indictment of both President and Vice President and the consecutive motion to withdraw from the Rome Statutes failed to unify Africans against the ICC.

The Impact of the Westgate Attack

By Evolution Africa

In the context of the interviewer accreditation programme, co-sponsored by MSRA, GFK Verein and KFW/DEG, Evolution Africa conducted a series of 3-day interviewer training workshops. To measure the impact of the training, interviewers were sent to conduct 5 interviews at the start of the workshop (PRE wave); at the end of the workshop, another fieldwork exercise was carried out (POST wave); comparing the results of both waves enabled the trainers to measure the positive influence the training sessions had on interviewer performance.

The topic of the training questionnaire was the security situation in Nairobi; this included, among others, questions on perceived insecurity and ratings of police, courts and the military. Although the questionnaire was designed for training purposes, the results nevertheless provide interesting insight into security perceptions of inhabitants of Nairobi.

The following article examines trends across a total sample of 1,288 interviews, conducted during the first four workshops:

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“DRUMBEAT 2004”: A Decade of the Pan Africa LSM in Kenya and Why We Are Overdue for an Upgrade

By Millward Brown E.A Ltd

History of consumer classification in Kenya

	OUTCOME
Social Classes launch by Research Bureau (later to become Research International (RI) but at the time literally the research department for East Africa Industries/ Unilever in the early 70's	ABCDE
Updated by RI in the early 80's	E = 30%
Through “Windows on Kenya” updated again in 1989 (enter C1 v. C2)	ABC ₁ C ₂ DE E = 15%
Through “Windows on East Africa” update in 1996.	C ₁ 89=21% C ₁ 96=11%
Additional profile information undertaken in 2000 following the near collapse of the Middle Class in Kenya	C ₂ DE > 80%

Origins of the LSMs

“ This short note is designed to help you navigate the LSM data for the 15 countries covered in project Drumbeat. For each country there are two sets of Living Standard Measures (LSMs). One is the Drumbeat Africa Regional LSM (DAR LSM) which is exclusive to the ten members of the African Marketing Syndicate that commissioned project Drumbeat and the other are country specific LSM groups”.

So began the introduction to the LSMs in 2004, but indeed the work on LSMs had began several years before.

Inspired by Unilever in collaboration with SAARF (South African Advertising Research Foundation) a factor analysis was conducted using a wide range of variables during the 1990s. Initial experimental and exploratory work on this was conducted on consumer panel data by Joe Boniaszczuk and Bill Hunt of Research International South Africa. But the second leg of this work that resulted in what we today refer to as the Pan African LSMs was on the back of some initial academic work by Zimbabwean **Ms. Tendai Mhizha** who many acknowledge today as the “Mother of LSMs”.

Tendai's LSMs –if I may call them that- involved a market research survey named “Drumbeat” and covered 9 sub Saharan Africa markets, but was then extrapolated to cover 15 African markets. For this leg Unilever remained a key stakeholder but was now joined by a couple of other FMCG companies (referred to then as the syndicate group, a group of 10 which included Coca-Cola, Standard Bank amongst others) to help finance the massive research that this was. As a matter of fact the DAR 2004 LSMs we use today, was copyrighted exclusively to this syndicate group for the 1st 3 years. In-between this time Tendai and team developed what I choose to call country surrogate LSM (which were specific to each country).

She introduced them thus at the time: “Please note that we have recalculated LSMs for every country regardless of whether they had an LSM already or not. This is due to the fact that we believed each country should be calculated in the same way in order to achieve harmony across Africa in research. This decision was very much inspired by and based on the philosophy of PAMRO the Pan-African Media Research

Organisation as discussed in Mauritius in 2003”

But in reality what everybody wanted was the Pan-African LSM and these country specific LSMs died out once the exclusivity period enjoyed by the syndicate group expired.

The adoption of LSMs in Kenya would not have taken off but for the persistence of then Research International MDs **Melisa Baker** and more so **Ngumo Wa Nguru**.

The realisation that it needed to be owned by the industry resulted in it being brought to the fore of the MSRA (Marketing and Social Research Association) and together with **George Waititu** at then Steadman and Associates (the two companies were literally the research universe at the time, so they had to be the early adaptors if LSMs were to really take off) the MSRA leadership began monthly research agency road shows to get buy in and compliance in use by all MSRA membership.

Why LSMs over ABCDE?

The desired result was a predictive questionnaire that could be easily administered by interviewers in the field.

From PAMRO conferences and similar forums the clients were pushing back and querying why different yard sticks were being used to measure the same universe (An AB in one research agency study would be a C1 in the other).

Pre-2014 different research agencies used different classification parameters:

- Socio-economic groups
- Community type groups
- Personal income/household expenditure - *The most unreliable measures in Africa!*
- Education
- Basic demographics

Naturally, the confused clients viewed us as a tower of Babel. Hard questions were constantly on the table:

- How do we segment markets?
- How do we target consumers correctly?
- How do we Make use of research data to create strategies?
- How do we reduce advertising wastage?
- Cost per which thousand?

Once the backroom analysis had been sorted and validated, DAR 2004 was ready for roll out.

We introduced LSMs thus:

LSMs are:

- A composite non-demographic measure of wealth, living standard, affluence
- Based on access to a wide range of goods and services
- A scientific surrogate for socio-economic groups and income
- Strategic marketing tool

What LSMs are not:

- A psychographic measure
- A lifestyle typology system

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To this day, the key take-out of how LSMs work/measure is to remember that we capture access as opposed to ownership. Never forget this.

In this classification environment the user has an equal weight as the buyer, the influencer counters the decision maker. The underlying logic of putting weight on access is simple and practical. Think about it using a couple of examples.

1. **Mercedes wants (representative) feedback on the performance of the car?** Do you talk to the owner, the driver or both?
2. **An upmarket detergent maker wants (representative) feedback on their new faster working formula?** The mother of the house (buyer) or the user (housemaid)?

DRUMBEAT 2004 AFRICA REGIONAL DAR LSM PREDICTOR QUESTIONNAIRE Circle all that apply	STEP 1- Score
Do you have a Colour TV?	18
Did you access the Internet during the past 4 weeks?	49
Do you have a Satellite dish/ DSTV/Cable TV subscription?	34
Do you have a built in kitchen sink in your household?	31
Do you have a Microwave oven?	32
Did you read a newspaper in the last 7 days?	17
Do you have a video recorder?	18
Do you have a mobile / cell phone with a working line?	16
Do you have an electric iron?	17
Do you have a personal computer for your own personal use at home?	34
Do you have a fixed telephone line at home or an outstanding application for one?	14
Have you watched TV in the last 7 days	17
Do you have access to e-mail?	41
Do you have washing machine?	32
Do you have refrigerator?	20
Do you have a Hi-Fi or music centre?	17
Do you have a Free Standing Deep Freezer?	19
Do you have a Video camera/camcorder?	35
Do you have an account with a Commercial Bank?	15
Do you live in a Brick house/ cluster house/ condominium/flat?	11
Do you have one or more cars in your household?	12
Have you Bought adult clothing in the past six months?	10
Add this every time (constant)	32
STEP 2 : Add all circled scores including the constant	

Please humour me: What LSM are you?

STEP 3 : Look up DAR 2004 LSM group						
If total score is		LSM Group	If total score is			LSM Group
Up to	37	1	187	to	219	9
38	to 54	2	220	to 252		10
55	to 70	3	253	to 285		11
71	to 87	4	286	to 318		12
88	to 103	5	319	to 352		13
104	to 120	6	353	to 385		14
121	to 153	7	386	to 418		15
154	to 186	8	419	to 451		16
			452	to 999		17

There has been a tweak to the 2004 predictor questionnaire in regards to car(s) which was further broken down into

Do you have one or more cars in your household?	
1 car only	12
2 or more cars	24

...Finally to the point

To illustrate the point on why there is a need to update our predictor questionnaire, allow me to pick out some of the more pertinent questions to this argument

Predictor Case 1 : Do you have a Colour TV? [Weight = 18]
At the very last Marketing and Social Research Association conference, a paper presented by Michael Kagali and Charles Wanga touched on this point. It was via a simple question: how many of us have tried to purchase a brand new Black & White TV recently? It is no longer practical to produce them as the unit cost is much higher than that of a plasma TV!

So 10 years ago it made sense to ask this question as the technology was the same (i.e. all CRT) with colour being the cost differentiator. Today the default is colour, so this is no longer a differentiator. For those of us who work with the client with their own LSM predictor questionnaire version, know that for many years they have already been awarding different weights/scores for different type of TV set (e.g. CRT v. plasma)

Predictor Case 2: Do you have a video recorder? [weight = 18]
Any one bought a brand new VCR (video Cassette Recorder) or video Cassette recently?.....

In some of our organisations I have seen this 'updated' to read VCR/ DVD recorder/player. Which just supports the argument for a refresh but from the angle that it is no longer a scientific instrument (the same respondent will land in a different score depending on which LSM questionnaire was administered - there must always be one 'standard gauge' questionnaire if we are to remain true to our promise to deliver universal classification.

Predictor Case 3 : Did you access the Internet during the past 4 weeks? [Weight = 49] and Do you have access to e-mail? [weight =41]

The twenty something year olds reading this are probably asking "is it possible to have one without the other?" Yes, 10 years ago this was our reality...

These two predictor questions have the heaviest weights of all the questions. 10 years ago the mobile revolution was just at it's sprouting stage. The cost of connecting to the internet was so prohibitive and at the time was only possible via dial-up (via fixed line connected modem-so you had to have a fixed line to start with, and that was no mean task) For Cyber Cafes therefore this cost was transferred to the customers. So for sure if you could access internet you paid an arm and a leg. So rare was this experience (checking mail) that the question itself was framed to cover a whole month window!

Keep in mind that in Kenya today the single largest access channel to internet is the mobile phone, so the dynamics of access and therefore penetration has been turned on it's head. These can in no way remain the mega predictors their weights imply.

Predictor Case 4 : Do you have a Satellite dish/ DSTV/Cable TV? [Weight = 34]

10 years ago getting just the DSTV dish installed would have taken you back up to 100,000 bob depending on your location. Compare -

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that with the 'free' installation offers available this World Cup month.

Predictor Case 4 : Do you have a Satellite dish/ DSTV/Cable TV? [Weight = 34]

10 years ago getting just the DSTV dish installed would have taken you back up to 100,000 bob depending on your location. Compare that with the 'free' installation offers available this World Cup month.

Predictor Case 5 : Do you have a mobile / cell phone with a working line? (Weight 16%)

What was mobile penetration 10 years ago? What is it today? What do we project 2 years from now? Should it even be on the list?

So clearly without belabouring the point, from these few examples there is a need for a level of refresh in the current predictor variables.

The ability to accurately classify consumers has therefore been eroded over time. The danger of this is simple if we use the LSMs as the true measure of living standards then we result in a scenario

where more and more people are scoring higher and higher scores thus creating the false impression that they can be used as a measure to indicate the improvement of Kenya living standards over the past decade (as I saw in one business newspaper article), while the reality is that our original predictor questionnaire was heavy on technological variables, and simply put, technology has caught up with us.

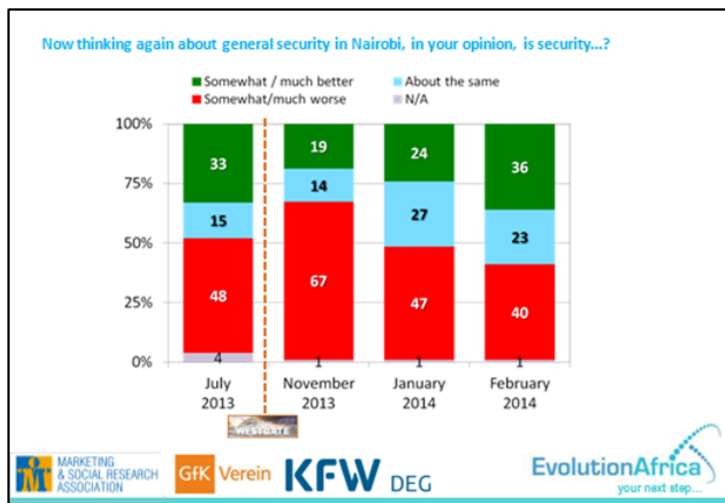
At this juncture it is important to note that Unilever initiated and maintained a separate and unique LSM questionnaire post DAR 2004 that has regularly been updated and validated. The latest version aptly named LSM 2.0 (all rights reserved) and validated in some African markets already

So as we approach our annual conference, let's take some time on just what we have and like 10 years ago let's put in the commitment again to contribute to this overdue update.

Paul Omondi is a long serving Market Research practitioner currently with Millward Brown EA.

Continued from Pg 1

- Pilot workshop: 29th -31st July 2013 (n=342)
- 2nd workshop: 6th – 8th November 2013 (n=350)
- 3rd Workshop: 27th – 29th January 2014 (n=348)
- 4th workshop: 26th – 28th Feb 2014 (n=248)



As the memory of Westgate was fading, there was a gradual shift towards optimism again: by February 2014, 36% saw improvements, while just 40% perceived further declines. The final workshops to be held in May, June and July 2014 will demonstrate whether rising optimism will persist despite the recent Thika Road and Gikomba market bombings.

The training questionnaire also tracked the public's perceptions of three institutions: the police, the courts and the military. Across the four waves, the police are consistently rated poorly: dishonest, corrupt, ineffective, undisciplined and untrustworthy. Though far from receiving glowing reviews, the courts are rated higher (above 3 on a 5-point scale); however, even the courts are seen as corrupt, albeit still better than the police.

In July, the military was the most respected among the three institutions: honest, effective and disciplined...and only mildly corrupt. Although the military was still perceived better than either courts or the police, the military's handling of the Westgate attacks severely tarnished their reputation.

And although ratings have improved since the November 2013 low point, reputation scores for the military remain significantly (at 99% confidence) lower than those achieved in July 2013.

The attack on the Westgate shopping mall occurred on September 21, 2013 - halfway between the pilot workshop (which now serves as baseline) and the second workshop.

Across the four waves, the security situation was judged as generally poor, with mean scores ranging from 4.2 to 4.5 on a ten-point scale. However, the Westgate attack left a clear impression on the minds of respondents:

While in July 2013, a third of respondents still felt that security was improving (somewhat/much better), and only 48% felt that it was getting worse (somewhat/much worse), by November – a month and a half after the Westgate attack – two thirds of respondents (67%) conceded that the security situation was deteriorating. Just one in five still felt that security was improving.

