

The state of South Africans as we start 2007

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RS, South Africa's leading marketing and social insights company, has conducted several studies in recent months amongst representative samples of SA adults (aged 18 years and older) from all over South Africa, to determine their reactions to various issues and to determine their overall levels of well-being. What is the state of South Africa's mind, body and soul as 2007 gets well and truly underway?

How do people live? (based on a study of 3 500 adults aged 18 years and over across South Africa in late 2006)
StatsSA estimate that there were 47.4 million people in SA mid-2006, 28.2 million being aged 18 years or older. Just over a third live in the seven metropolitan areas and four out of ten live in rural areas. RS estimates that there are 12.4 million households, of which 5.2 million are in metropolitan areas.

- > 55% have **municipal water** in their homes (2005: 52%) and another 18% have municipal water on their stands – so 73% in total have access to decent water where they live (71% in 2005)(93% in metro areas cf 90% in 2005); 24% use a communal tap (20% in 2005) and 6% have other sources (9% in 2005). This represents a small but significant improvement over 2005.
- > 57% have a **flush toilet** (88% in metro areas) (2005: 54% and 88% respectively)
- > 88% have **electricity** (95% in urban areas, 74% in rural areas). Only 29% have hot running water. (2005: 86%, 95%, 69% and 28% respectively – an improvement in rural areas)
- > Of the 12.4 million households, 1.3 million live in **shacks** and 1.7 million live in **traditional huts**. In metro areas, 14% live in shacks, this accounting for 53% of all shacks. This represents no significant change over 2005.

What do people earn? Poverty, nutrition and stress

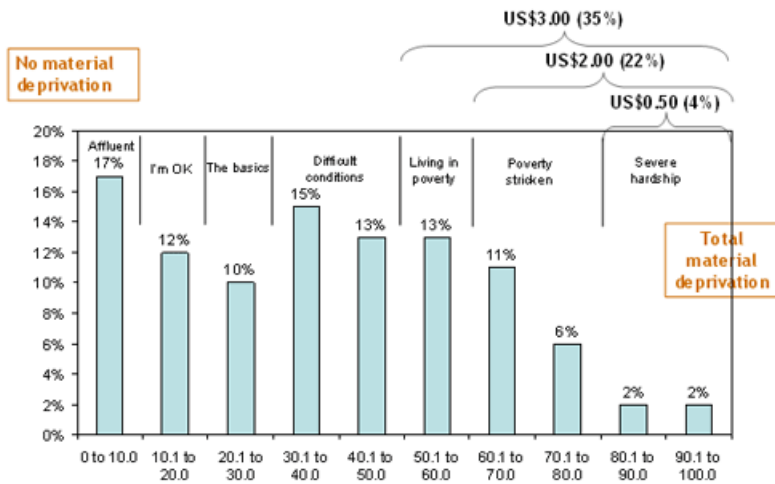
- > 48% of adults have some level of employment (2005: 45%); 30% are **unemployed and looking for work** (the official definition of unemployment) (2005: 28%).
- > The median monthly household income is R2 2 50, increasing at about 7.7% per year over the past three years. With inflation for the country taken as a whole averaging 4.8%, this gives a real median income growth of just 2.8% over the last three years. However, the last year showed an increase in income growth. The third quartile is R5 450; the first quartile is R1100.

TNS Research Surveys has a **poverty measure** that runs from zero (no material deprivation) to 100 (almost no basic needs filled). Poverty is measured by access to good water, sanitation, electricity, telecommunications and transport as well as adequacy of nutrition – it is a measure of deprivation. The average for 2006 was 39, down from the 2003 figure of 43 and the 2005 figure of 41 – a consistent move in the right direction. Blacks dropped from 50 in 2003 to 48 in 2005 to 46 in 2006, coloureds from 32 to 26 to 25 in 2006 whilst Indians/Asians at 12 and whites at seven were static.

TNS Research Surveys defines **three poverty lines**: people scoring 50 and over (35% of the population; 39% in 2005) can be said to be experiencing poverty at some level; people scoring 60 and over are defined as “poverty stricken” (22% of the population (25% in 2005), 63% of those living in poverty); people scoring 80 and over are defined as suffering hardship and poverty of the most extreme kind (4% of the total population (8% in 2005), 12% of those living in poverty (21% in 2005). Hence, there have been small but important improvements poverty levels.

Poverty levels are worst amongst rural farm workers (85% live in poverty, up from 78% in 2005), rural villages (73%, down from 79% in 2005) and urban squatter shacks (63%, down from 72% in 2005).

The poverty continuum - 2007



Eleven percent of people score over 50 on the zero to 100 stress measure developed by TNS Research Surveys and can be regarded as stressed. Stress/pressure looks at the incidence of feeling frightened, adequacy of leisure, support systems and the incidence of close relationships, having purpose and direction in life, energy levels, spirituality, depression, loneliness, anxiety, feelings of being a failure and overall happiness.

Poverty stress is a term coined by TNS Research Surveys to distinguish between the stress caused by poverty and other stress. Of the 11% of stressed people, 53% suffer poverty stress by scoring 50 and over on both the **stress and poverty** measures (58% in 2005). This represents 6% of the population, down from the 2005 figure of 7%. Of those living in poverty, 16% are stressed (down from 18% in 2005) compared with only 8% of the relatively affluent (up from 5% in 2005).

Hence, we see that poverty alleviation is helping stress levels amongst the poor but that stress levels amongst more affluent people are on the rise.

Overall, 17% of people say that they **cannot afford to eat the correct foods** (22% in 2005; 30% in 2003). This rises to 78% in the most severe poverty category (those scoring 80 and over on the poverty measure). Nine percent say that they have gone without food at least twice in the last month because they could not afford food. This rises to 22% in the most extreme poverty group.

A half of the population say that they always have enough fuel to heat their homes and cook their food.

Education plays a vital role

One adult in eight either has no formal education or has had only some primary school education. One in ten has completed primary school but gone no higher. Almost four in ten have had some high school education whilst 27% have matriculated but gone no further. One in seven adults has gone beyond matric: 32% have done some university, 3% have completed university and 8% have other post-matric qualifications.

Health, stress and pressure, leisure time and support systems

"I feel well and in good health" received a 61% response in both the 2006 and the 2005 studies (2003: 57%), but 8% say that they "don't feel really well most of the time" (11% in 2005) (28% in the *Severe hardship* poverty group) leaving 31% in an intermediate state of health. Just over a quarter of people admit to little or no physical exercise (a third in 2005) whilst 23% consider themselves physically fit (no change over 2005).

-> Dietary habits

A quarter of people say that they include a lot of fruit, vegetables and salad in their diet, this being very strongly influenced by income: this rises to 60% for those with a household income of R15 000 or more per month. One person in seven says that they often skip meals.

Adequate **leisure** time is only the purview of a third of adult South Africans in both 2006 and 2005 (2003: 48% - a major drop). However, only 11% of those in the severe poverty group have enough leisure time. Having **good support systems** is a contributor to one's overall mental state: 59% of people say that they have friends and family to turn to whenever needed, this being consistent across all the poverty groups but considerably lower compared with the 2003 figure of 74% and slightly down on the 61% of 2005. The overall impression is one of increased activity and stress – a vibrancy – for the second year in a row.

People's self-reported mental and emotional state shows consistency over the years:

- > "I feel I am a failure" – 6% (7% in both 2003 and 2005)
- > "I experience feelings of depression or hopelessness" – 10% (15% in 2005 and 16% in 2003)
- > "I feel like my life is emotionally empty" – 7% (12% in 2005 and 13% in 2003)
- > "I feel anxious, tense and a sense of panic" – 6% in 2006, 7% in 2005 and 8% in 2003)
- > "I feel lonely" – 10% in both 2006 and 2005 (2003: 12%)

- > "I feel alive and energetic" – 50% (2005: 51%, 2003: 53%)
- > "I have a varied life with lots of different activities" – 28% in both 2005 and 2006 (2003: 25%)
- > "I regard myself as a spiritual person" – 39% in both 2005 and 2006 (2003: 37%)
- > "My life has meaning and purpose" – 50% (49% in 2005, 55% in 2003)

The average of the zero-to-100 **health** measure developed by RS in 2003 was 72; in 2005, it was 71 and is back to 72 in 2006. However, it drops to 54 in the most extreme poverty group, indicating the dire conditions of the very poor.

The **stress/pressure** measure mean was 29 in 2003; in 2005, it was 32 and in 2006 it came in at 31 (44 for the top poverty group). These are statistically significant changes although small in real terms: the increased activity and stress are partly counteracted by higher levels of fulfilment.

Health has a strong correlation with high levels of poverty: the health mean drops to 54 in the *Severe hardship* group. This average hides the severity of the situation: overall, 19% of people can be described as either *Sickly and depressed* or as *Poorly* (by having scores of 60 or below on the health measure) (2005: 23%); this rises to 65% in the *Severe hardship* group (2005: 56%). Hence, although the top poverty group has declined in size, it suffers poorer conditions.

Overall, stress levels are highest for those aged 30 to 34, this being the point at which those with jobs are trying hardest to better themselves; those unemployed will be feeling the stress of needing to provide at an age when marriage and children are most likely.

As well as reduced leisure, for whites, there has been a decline in having friends and family at hand and a greater sense that they have lost direction and purpose. This may be attributed partly to problems induced by affirmative action and broad-based black economic empowerment (jobs are more difficult to find and to keep) and to migration/emigration.

Government grants

Forty-eight percent of people say that someone in their household receives some sort of Government grant. By far the most common is the child grant (33%) with an old age pension being mentioned by 20%. Disability grants were mentioned by 5% and other government grants by 2%. What is alarming is that the incidence of claimed grants drops off to 33% in the very lowest income groups (LSM 1 and 2 - where it would be most needed) and its at its highest (60%) in the middle LSMs (LSM 5), indicating that there is likely to be either a lack of awareness of eligibility amongst the very poor or that access is a problem.

People's views on current issues

• AIDS

HIV/AIDS continues to be a divisive issue in 2006: 58% of people feel that the Government's stance on AIDS has seriously harmed our reputation in the rest of the world. However, a telephone study in metro areas of 509 people in November did show that 65% of these admittedly more affluent people did feel that this stance was changing.

• Smoking

Just over a quarter of people feel that smoking is quite acceptable despite the medical evidence. This is higher for males (34%) than females (24%).

• Home Affairs

Just over a half of the population feel that Home Affairs "is a disaster". This cuts across most demographic groups.

Considering the importance of basic documents such as ID books to enable people to run their lives (open bank accounts, get credit, apply for government grants), this is a serious indictment

• Crime

A study of 2 000 metro dwellers in the third quarter of 2006 showed that only 15% felt that crime levels were dropping whilst 81% felt they were increasing. An alarming 75% said that they did not feel safe because of crime levels. These response levels were fairly consistent across all race groups. We concluded:

"That three-quarters of metropolitan dwellers feel unsafe because of crime levels is a disgrace; this is exacerbated by the fact that eight out of ten people do not feel that crime levels are dropping.

"It is true that these findings report people's perceptions: the reality may well be different. If this is the case, clearly the authorities need very urgently to communicate hard facts relating to crime levels very vociferously. A problem here is that a survey conducted by RS in October 2004 also amongst 2 000 metropolitan dwellers showed that six out of ten people do not believe SAPS statistics (though this type of disbelief is not uniquely South African). There is clearly a need for a credible independent third party to collect and disseminate such statistics.

"If these perceptions do match reality, Government needs to look with extreme urgency at how it funds, resources and manages its various police services at all levels of government.

"People manage their lives based on what they perceive to be reality. Such levels of fear undermine productivity and optimism considerably, this in turn having a knock-on effect on the economy. Reducing fear levels will be a stimulus to economic growth, job creation and poverty alleviation. We also must consider how people outside the country might view South Africa as we run up to the 2010 Soccer World Cup.

A study of 3 300 adults that has run continuously over the past year amongst metropolitan dwellers and those living in smaller towns found that in 8% of households (one million households), someone in the immediate family had been robbed or had a burglary in the past six months, 1.5% had experienced a murder (180 000 households), 1.2% a rape or indecent assault in the past six months (150 000 households), 2% a hijack and 2% a car stolen (250 000 households each). This merely reflects what people claim, and different people may define a household differently.

• Jacob Zuma

The national study at the end of last year showed that whilst 43% of people feel that Jacob Zuma should be re-instated as Deputy President, 50% feel that if he becomes President in 2009, it will bring disaster to South Africa. Further, 57% feel that he has brought disgrace to SA.

• Service delivery

A study of 3 300 adults that has run continuously over the past year amongst metropolitan dwellers and those living in smaller towns shows that 19% are extremely satisfied with their municipality, 41% are fairly satisfied, 13% are not sure, 17% are not very satisfied and 11% are extremely dissatisfied.

This translates into over a quarter being unhappy and 60% being happy with their local municipality.

• Feelings about the country and the President

Almost everyone (96%) is proud to be South African. Three-quarters of people feel South Africa has a bright future (88% of blacks, 49% of whites, 64% of coloureds and 72% of Indians/Asians) whilst 69% feel it is going in the right direction (83% of blacks, 42% of whites, 48% of coloureds and 52% of Indians/Asians). Is the Government doing a good job? Six out of ten South Africans feel it is (77% of blacks, 32% of whites, 41% of coloureds and 41% of Indians/Asians). The President's approval rating amongst metro dwellers dropped from an average of 61% in 2005 to 56% in 2006.

• Happiness

RS measures happiness in two ways: via an index that looks at people's positive and negative general mood levels, and their satisfaction with their lives (subjective well-being (SWB)), and also via a simple statement:

-> "Generally, I am a happy and cheerful person" – 59% (2005: 56%; 2003: 60%)

This rise is reflected across all race groups: Blacks rose from 53% to 56%, whites from 65% to 71%, coloureds from 64% to 66% and Indians/Asians from 70% to 73%. However, whites in 2003 had a response rate of 81%, so, whilst there has been a recovery from last year's low of 65%, whites still find themselves somewhat less happy than three years ago due to increased pressure, a drop in sense of direction, decline in support structures as family members move either to other parts of the country or emigrate, and worries over increased competition.

The SWB measure is constant at 75. There is some variation across race groups: blacks – 74, whites – 82, coloureds – 76 and Indians/Asians - 80. Having a full-time job, on average, lifts SWB scores four points – but seven points above those who are unemployed. Lack of a job affects one's self-esteem, reward and recognition levels.

• Market sentiment and the economy

"Consumer confidence" has become an important barometer for economists to monitor. RS's metropolitan Market Sentiment Index (MSI) looks both at how a sample of 2 000 people in metropolitan areas feel about their current economic circumstances and their future prospects. The index is measured several times a year.

Jobs and inflation are key components. In 2005, the index averaged 139, up from the 2004 average of 136, the 2003 average of 120 and the average of 99 recorded at the index's inception in 2002. The 2006 average is 141.

-> **Jobs:** The job market continues to be the most pessimistically viewed part of our economy with 92% of South African metro adults saying that "jobs are hard to find at the moment". This figure has not moved significantly in three years. However, 31% feel that jobs will be easier to find in the next six months, compared with 26% at the end of 2005 and with only 14% in early 2002. 52% feel they will be more difficult to find in six months' time, down from 74% in early 2002. One in ten people worry that the main wage earner in their household will lose his or her job.

-> **Inflation:** Although people's expectations about inflation have improved dramatically over the past three years, the reality is that people still battle with high prices: only 24% say that their income keeps up with inflation and 85% complain of prices rising faster than incomes.

-> **Business conditions:** Sentiment over business conditions at present is the most positive since 2002 with 43% of people feeling that business conditions are really good at present (up from 34% at the end of 2005) and 34% feeling they are poor (down from 41% in 2005).

• Overall Everyday Quality of Life (EQLi™)

This overarching measure takes a holistic view of all aspects of a person's well-being from their physical circumstances to their health and stress levels, the condition of their environment and their mental, emotional and spiritual well-being. In 2003, the measure stood at 58 (on a zero-to-100 scale); in 2005, it was 57 and in 2006, it returned to 58, all insignificant overall changes. Despite the small real growth in incomes over the past two years, this has not yet greatly affected the overall quality of people's lives when taken as an average over the whole country. This is because of the high levels of unemployment and the still relatively high levels of poverty.

For whites, however, the measure declined from 82 in 2003 to 78 in 2005 and in 2006 stands at 79. The black figure was steady at 52 from 2003 to 2005 and rose slightly to 53 in 2006, a decline in small urban areas (due to crumbling infrastructure) being a little more than balanced by consistent one point rises in metropolitan areas:

-> Metropolitan areas

o Blacks – 60 (2005: 59; 2003: 58)

o Whites – 79 (2005: 78; 2003: 83)

o Coloureds – 72 (2005: 68; 2003: 69)

o Indians/Asians – 76 (2005: 74; 2003: 74)

-> Other urban areas

o Blacks – 57 (2005: 56; 2003: 59)

o Whites – 80 (2005: 79; 2003: 81)

o Coloureds – 62 (2005: 63; 2003: 61)

-> Rural areas

o Blacks – 45 (2005: 45; 2003: 44)

o Whites – 77 (2005: 70; 2003: 77)

o Coloureds – 52 (2005: 58; 2003: 48) (caution: small sample base)

Our take-out

Poverty levels show small but important declines and infrastructure is slowly improving, although there are some worrying declines in the provision of infrastructure in smaller towns. The median household income level has shown a fair improvement to R2 250 per month in 2006 compared with 2005. Half of households claim to receive some sort of government grant, this mainly being a child grant (33%). There is a need to improve people's awareness of their eligibility for government grants at the poorest end of the spectrum.

Poverty alleviation is helping stress levels amongst the poor but stress levels amongst more affluent people are on the rise. Overall, 11% of people can be defined as stressed. Self-perceived health levels have shown a small improvement and the overall impression is one of increased activity and stress – a vibrancy – for the second year in a row.

On key issues, the country is either divided or critical of the situation: over half of people feel the government's stance on AIDS has brought disgrace to South Africa although there is some acknowledgement that this stance is changing. Half of people feel Home Affairs is a disaster – a critical problem as people need ID books and other documents to run their lives. Eight out of ten metro dwellers feel crime is increasing and three-quarters say that they feel unsafe because of crime. This cuts across all demographics. A quarter of urban people are dissatisfied with their local municipality.

Almost everyone is proud to be South African, and two-thirds feel the country is going in the right direction. The government's approval rating is 60%. The President's approval rating amongst metro dwellers dropped from 61% in 2005 to 56% in 2006. The Market Sentiment Index (which measures consumer confidence) edged up from 139 in 2005 to 141 in

2006 after a drop mid-year.

The overall impression is one of a country where family and community structures are in considerable flux. Pressure levels are higher in a more vibrant but more stressed environment but poverty levels show a small but important decline. For blacks, there are some clear improvements in metro areas in basic living conditions, but service delivery is a potential problem in non-metro areas. There are concerning divisions in the country on key issues such as AIDS, crime, home affairs and Jacob Zuma, suggesting that Government needs to take a decisive stand in these arenas in this critical year in which President Mbeki's successor will be elected by the ANC. Consumer confidence in the economy and in economic prospects continues to rise slowly.

Technical note

The principal study was conducted amongst a sample of 3 500 adults (2 410, 585 whites, 390 coloureds and 115 Indians/Asians) in the major metropolitan areas, the smaller towns of South Africa as well as rural areas in late 2006: the study has a margin of error of under 2% for the results found for the total sample. The study is conducted by TNS Research Surveys as part of their ongoing research into current social and political issues and is funded by RS. For more details, please contact Neil Higgs, Director, Innovation and Development, on (011) 778-7500 or 082-376-6312.

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