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REPORT (In 3 parts due to size)

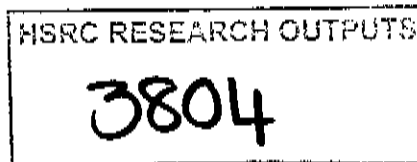
Struwig, J. Communication environment of South Africans. Quarter 9 report to GCIS. Sept 2005.



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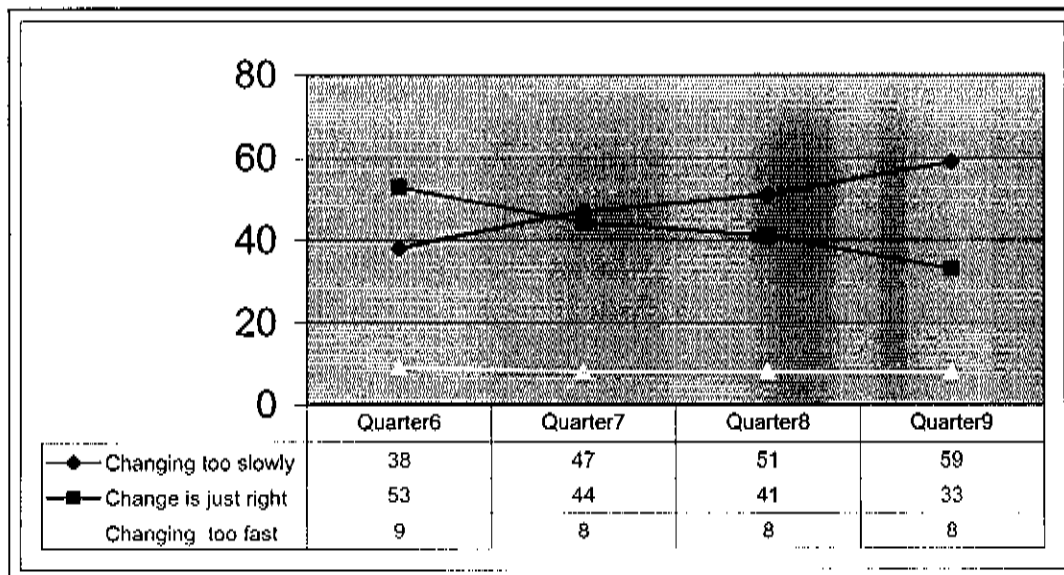
GOVERNMENT PERFORMANCE

Greatest challenges facing South Africa in the next 10 years

Just less than three-quarters (74%) of South Africans were of the view that employment remains one of the greatest challenges facing South Africa in the next decade. Issues relating to health (more specifically HIV/AIDS) were second in importance with 43% of respondents regarding this as one of the greatest challenges. Crime, safety and security declined in importance as a perceived challenge towards the end of the period under review with 40% of people specifying crime and safety as a priority challenge. Almost a third (30%) of the respondents saw housing as a big challenge, an upward trend on previous quarters. Community and basic services also seem to show an upward trend with 27% of respondents mentioning this as a challenge.

Respondents who cited crime as a priority challenge were more likely to be Asian (66%) or white (64%), or in LSM 9-10 (64%) or LSM 7-8 (57%) categories and residing in the Western Cape (57%) or Gauteng (51%), and speaking either English (60%) or Afrikaans (53%). Community and basic services as a challenge was typically mentioned by rural residents (48%), specifically rural females (51%), with a LSM1-3 (48%), many residing in the Eastern Cape (48%) or Limpopo (46%) and with a primary school education (45%). Other perceived challenges were poverty (19%), education (13%), corruption (10%) and the economy (7%).

Figure 4: Pace of change in the country.



Perceptions that the pace of change in the country is too slow have risen sharply from quarter 6 to quarter 9 (increase from 38%-59%). This is however still lower than percentages recorded early 2003. A third of the respondents felt that the pace of change is just right and only 8% stated that it is too slow. Areas in which the perceived slow movement was most acutely felt emerged in issues relating to job creation and employment (35%), community and basic services and development (31%), housing (23%), crime (10%) and health (10%).

Table 9: Pace of change in the country by LSM

	LSM1	LSM2	LSM3	LSM4	LSM5	LSM6	LSM7	LSM8	LSM9	LSM10	TOTAL
Much too slowly	58	34	30	35	32	26	24	30	25	13	32
A little too slowly	27	28	28	33	31	25	22	21	25	19	27
Pace just right	14	30	33	27	29	41	45	39	36	56	33
A little too fast	1	8	9	4	7	8	6	7	2	6	6
Much too fast		1	1	1	0	1	4	4	11	6	2

Lower LSM respondents rather than high LSM respondents tended to feel that the pace of change in the country is too slow.

Table 10: Pace of change in the country by race

	African/Black	Coloured	White	Asian	TOTAL
Much too slowly	31	45	22	41	32
A little too slowly	29	24	17	30	27
Pace just right	32	20	51	22	33
A little too fast	7	8	4	7	6
Much too fast	1	4	6	0	2

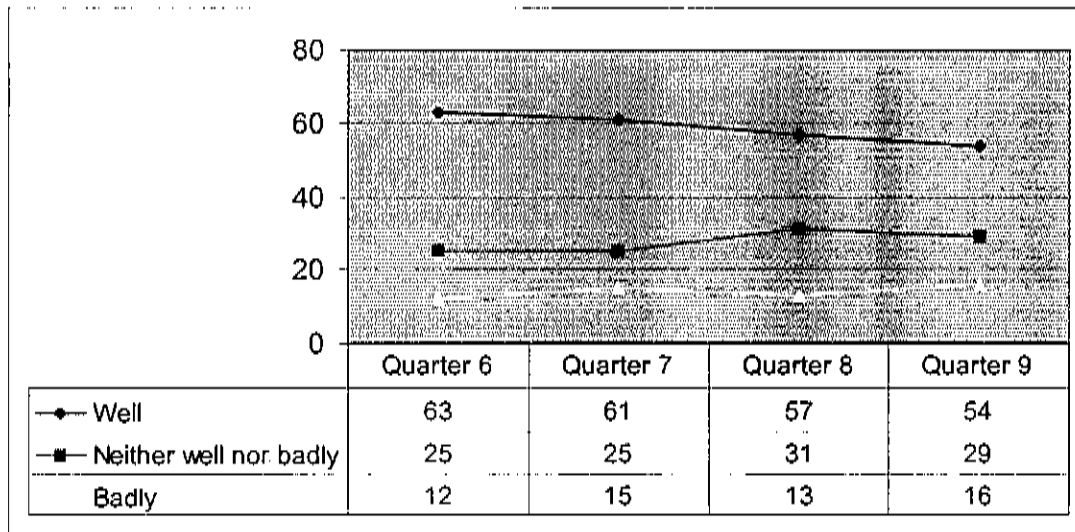
Relative to the other race groups, the Asian and coloured respondents felt that change in the country was taking place too slowly (71% and 69% respectively). More than half of the white respondents held the opinion that the pace of change was just right.

Table 11: Pace of change in the country by area

	Metro	Small Urban	Rural	TOTAL
Much too slowly	26	30	38	32
A little too slowly	24	24	33	27
Pace just right	40	37	23	33
A little too fast	6	8	6	6
Much too fast	3	1	1	2

When the perceptions about pace of change in the country were broken down by area, it was evident that rural residents were least satisfied with the pace of change in South Africa, 71% stating that the pace of change in the country is either much too slow or a little too slow.

Figure 5: Performance of government



Rating of government's performance has decreased since quarter 6. During quarter 9 just more than half of the respondents (54%) rated the government as having performed as either well or very well. Significant differences with regard to the rating of government's performance were found between LSM and race groups and area types.

Table 12: Performance of government by LSM

	LSM1	LSM2	LSM3	LSM4	LSM5	LSM6	LSM7	LSM8	LSM9	LSM10	TOTAL
Very well	13	17	17	15	14	20	17	5		3	14
Well	37	42	49	50	51	41	31	17	13	22	40
Neither well nor badly	32	36	18	31	21	21	30	36	49	56	29
Badly	7	3	13	4	8	13	10	24	27	9	10
Very badly	11	2	3	0	6	5	12	17	11	9	6

The LSM8 and LSM9 groups seem to be most critical of government's performance.

Table 13: Performance of government by race

	African/Black	Coloured	White	Asian
Very well	18	6	2	4
Well	47	19	15	37
Neither well nor badly	26	35	48	30
Badly	7	17	25	11
Very badly	3	23	10	19

Significant differences were found between races with respect to perceptions of performance of government. Almost two-thirds (65%) of African/black respondents held the opinion that government was performing well. In contrast, 41% of Asian respondents, 25% of coloured respondents and 17% of white respondents held a positive view of government performance.

Table 14: Performance of government by area

	Metro	Small Urban	Rural
Very well	17	9	15
Well	35	46	42
Neither well nor badly	25	31	32
Badly	14	8	8
Very badly	9	6	4

Just more than half (52%) of respondents in metro areas, 55% in small urban areas and 57% in rural areas stated that government was either performing very well or well.

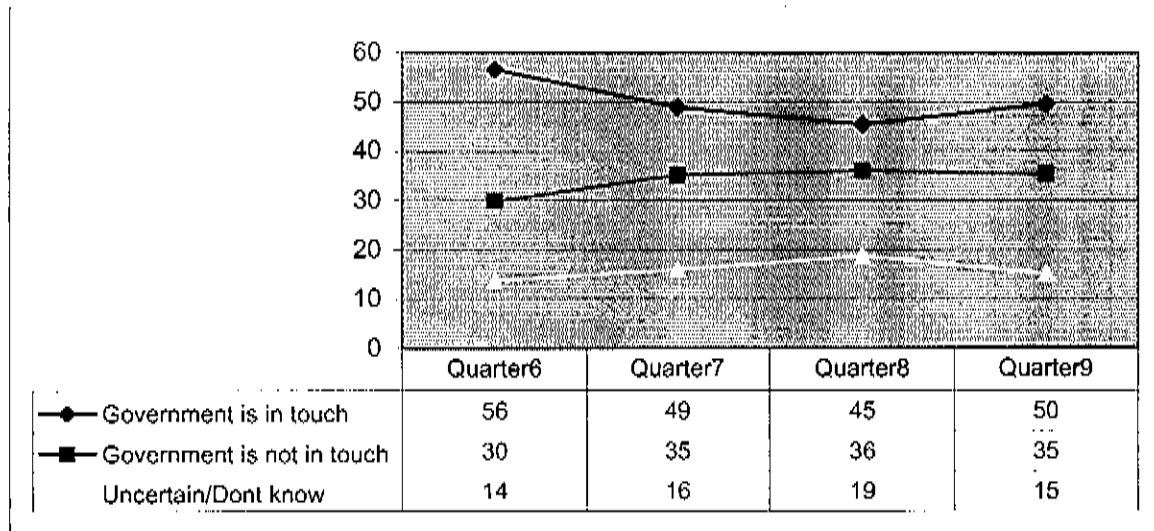
Table 15: Issues that have changed for the better since 1994

Issues	% change for better
Building international relations	64
Access to basic services	58
Providing houses	57
Government listening	55
Government caring about people	52
Quality of life	51
Develop rural areas	51
State of economy	42
Handling of HIV/AIDS	41
Improving transport for commuters	38
Quality of services in hospitals and clinics	35
Access to training and dev	33
Service by public servants	29
Fighting of crime	28
The justice system	27
Nat. Government in line with Nat programmes and policies	27
Closing gap between rich & poor	21

Building international relations was the area in which government has improved most since 1994, this being the opinion of 64% of respondents. In close contention for top place were improvement in access to basic services (58%), providing houses (57%), government listening to people (55%), government caring about people (52%), improving the quality of life (51%) and developing rural areas (51%). Government was least successful in the areas of service by public servants (29%), fighting crime (28%), the justice system (27%), being in line with national programmes and policies (27%) and closing the gap between rich and poor (21%).

South Africans generally support initiatives in Africa with 18% stating they always support these initiatives; 20% supporting them most of the time and 21% supporting them sometimes. Only 14% indicated that they did not support initiatives in Africa at all.

Figure 6: Government in touch with the people



Perceptions of government being in touch with people were highest during quarter 6 (election period). This positive trend declined as the election hype wore off and levels of optimism stabilised. From quarter 8 a light increase in positive sentiment was noted.

Table 16: Government in touch with the people by LSM

	LSM1	LSM2	LSM3	LSM4	LSM5	LSM6	LSM7	LSM8	LSM9	LSM10	TOTAL
Government is in touch	34	44	62	72	50	55	43	25	20	36	50
Government not in touch	43	33	24	17	34	35	46	70	58	45	35
Uncertain/Don't know	23	24	14	11	17	10	11	5	22	18	15

The LSM1 group, together with LSM8 and LSM9 groups were least convinced that government is in touch with people.

Table 17: Government in touch with the people by race

	African/Black	Coloured	White	Asian	TOTAL
Government is in touch	58	19	21	41	50
Government is not in touch	26	71	62	48	35
Uncertain/Don't know	16	11	17	11	15

More than half of the African/black respondents (58%) felt that the government was in touch with the people. In contrast, 71% of coloured people, 62% of white people and 48% of Asian people felt that the government was not in touch with the people.

When asked whose responsibility it was to solve the countries problems, the majority (69%) stated that it was the responsibility of both government and the public, 20% indicated it was government's responsibility and 8% indicated it was society's responsibility.

COMMUNICATION ENVIRONMENT OF SOUTH AFRICANS

Quarter 9 findings (28 February-22 May 2005)

BACKGROUND

This report deals with data collected during quarter 9 of the project, which spans from 28 February – 22 May 2005. In the report, quarter 9 data is also compared with quarter 6 data (12 April-4 July 2004), quarter 7 data (5 July -26 September 2004) and quarter 8 data (27 September-19 December 2004).

During quarter 9 a total of 940 respondents were interviewed. This report is based on the weighted data and therefore represents the adult population of South Africa. Percentages can be interpreted as representative of the adult population of South Africa.

In this report certain questions are cross-tabulated with demographic variables. Only results that show significant differences ($p < 0.001$) between groups are presented.

For the period under review, the male: female ratio was 46:54. In terms of age distribution, 23% were 18-24 years, 26% were 25-34 years, 28% were 35-49 years, 14% were 50-64 years and 8% were 65 years and older. Almost two-fifths (39%) were interviewed in rural areas, 38% in metro areas and 23% in small urban areas. A total of 76% of the respondents were African/Black, 9% were coloured, 12% were white and 3% were Asian. In the following table the respondents are profiled in term of key biographical variables.

Table 1: Profiling respondents

	Total n=940	EC n=112	FS n=60	GP n=284	KZN n=192	MP n=40*	LIM n=68	NC n=12**	NW n=52	WC n=120
Race										
African	76%	89%	83%	68%	85%	94%	100%	28%	98%	19%
Coloured	9%	6%	1%	4%	1%			48%		56%
White	12%	5%	16%	25%	5%	6%		25%		24%
Asian	3%			3%	9%				2%	1%
LSM										
LSM 1-3	36%	61%	19%	10%	52%	41%	74%	28%	33%	3%
LSM 4-6	41%	31%	60%	45%	30%	53%	26%	47%	62%	47%
LSM 7-8	15%	5%	16%	32%	11%	4%		6%	5%	27%
LSM 9-10	8%	2%	5%	13%	8%	3%		19%		24%
Age										
18-24 years	23%	15%	21%	19%	29%	15%	36%	34%	26%	17%
25-34 years	26%	17%	19%	32%	28%	34%	26%	21%	27%	23%
35-49 years	28%	41%	21%	31%	29%	25%	16%	15%	23%	30%
50-64 years	14%	22%	14%	9%	9%	24%	13%	30%	14%	19%
65+ years	8%	5%	25%	8%	5%	2%	9%		11%	12%

Table 1 (cont): Profiling respondents

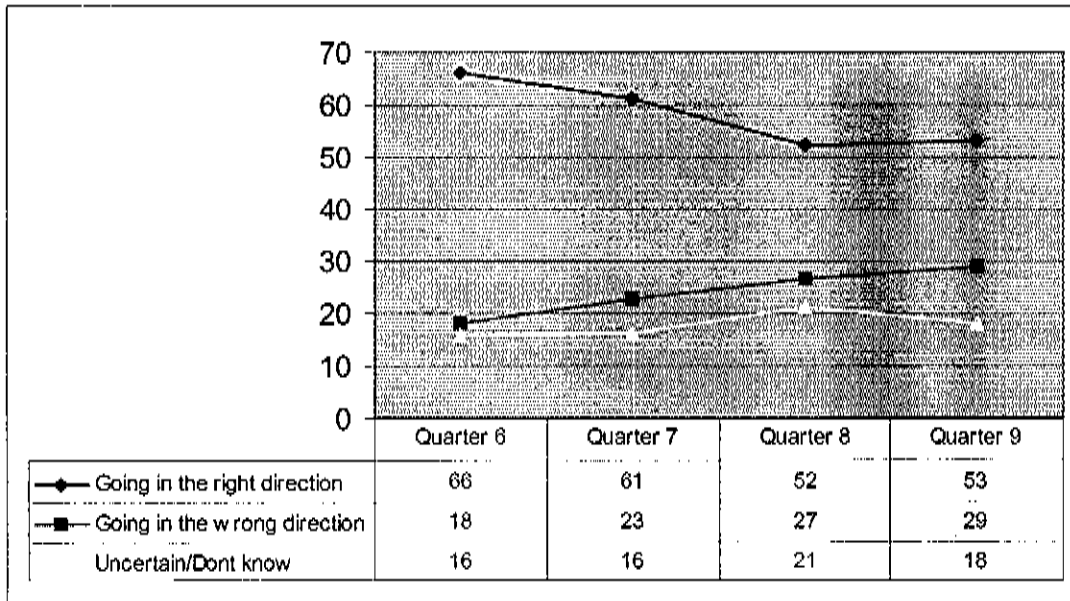
	Total n=940	EC n=112	FS n=60	GP n=284	KZN n=192	MP n=40*	LIM n=68	NC n=12**	NW n=52	WC n=120
Gender										
Male	46%	47%	44%	49%	52%	51%	38%	60%	28%	49%
Female	54%	53%	56%	51%	48%	49%	62%	40%	72%	51%
Education										
No schooling	5%	2%	15%	3%	7%	5%	9%	8%	6%	2%
Primary	19%	32%	27%	7%	21%	30%	16%	25%	23%	13%
Some high schooling	38%	51%	19%	30%	35%	37%	56%	57%	36%	40%
High schooling completed	29%	12%	32%	44%	29%	29%	19%	11%	23%	30%
Tertiary	9%	3%	7%	16%	8%		1%		12%	15%
Work status:										
worked past month	57%	59%	76%	66%	46%	43%	24%	64%	65%	78%
Area										
Metro	38%	23%	12%	91%	37%					57%
Small Urban	23%	22%	62%	6%	14%	45%	8%	65%	40%	29%
Rural	39%	55%	26%	2%	50%	55%	92%	35%	60%	13%

GENERAL MOOD AND STATE OF THE NATION

Issues related to employment remained the most prominent topic of conversation with 41% of respondents spontaneously indicating this as a topic of conversation. When compared to other quarters, health as a topic of conversation increased markedly to 16%, the second most talked about issue together with crime, safety and security. Community and basic services as a talked-about issue remained fairly stable at 14%, followed by poverty (10%), the economy (7%), housing and education (6%). People from metro areas were also more likely to discuss employment and crime while people in rural areas were more likely to discuss issues relating to basic community services.

In an attempt to gauge people's general perceptions of political efficacy, a question was posed regarding the direction of the country. Respondents were asked whether they thought the country was going in the right or wrong direction.

Figure1: General direction country is going



During quarter 9, 53% of the respondents stated that the country was going in the right direction, 29 % stated that it was going in the wrong direction and 18% felt uncertain. A decline in positive sentiment was found from quarter 6 (election period) but has levelled off from quarter 8. Positive opinions were significantly more prevalent amongst certain LSM groups and amongst African/Black people.

Table 2: Direction of country by LSM

	LSM1	LSM2	LSM3	LSM4	LSM5	LSM6	LSM7	LSM8	LSM9	LSM10	TOTAL
Going in the right direction	37	55	68	56	61	51	54	29	27	55	53
Going in the wrong direction	37	19	17	32	21	33	28	60	43	27	29
Uncertain/Don't know	27	25	14	12	18	17	18	10	30	18	18

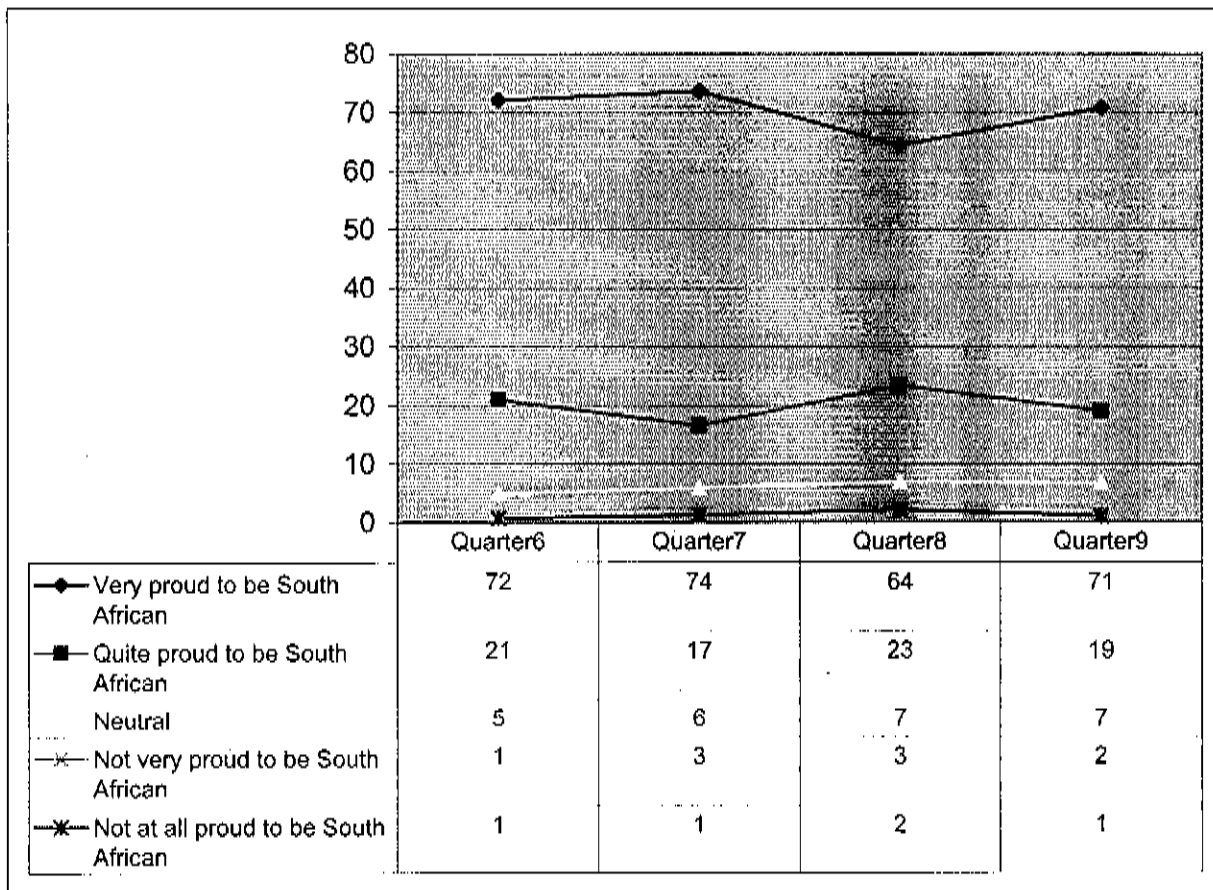
Apart from the LSM 1, LSM8 and LSM 9 groups, more than half of respondents in all the other LSM groupings felt that the country was going in the right direction. Negative sentiment was particularly notable in the LSM8 group where 60% of respondent stated that the county was going in the wrong direction.

Table 3: Direction of country by race

	African/Black	Coloured	White	Asian	TOTAL
Going in the right direction	60	30	31	41	53
Going in the wrong direction	24	41	46	48	29
Uncertain/Don't know	16	29	23	11	18

Significant differences exist between race groups with regard to their opinion about whether the country is going in the right or wrong direction. The majority of African/ Black South Africans (60%) were of the opinion that the country is going in the right direction, a sentiment shared by less than half of coloureds (41%), whites (46%) and Asians (48%). Levels of uncertainty remained high, especially for the coloured and white groups.

Figure 2: Proud of being South African



General pride levels remained high during quarter 9, with 71% of respondents indicating that they are very proud to be a South African and a further 19% indicating they are quite proud to be South African. Significant differences were found between LSM and race groups.

Table 4: Proud of being South African by LSM

	LSM1	LSM2	LSM3	LSM4	LSM5	LSM6	LSM7	LSM8	LSM9	LSM10	TOTAL
Very proud to be SA	53	69	77	77	74	76	80	55	44	70	71
Quite proud to be SA	36	24	18	11	16	13	14	29	31	18	19
Neutral	4	5	2	11	7	7	4	10	16	12	7
Not very proud to be SA	6	3	2		2	2	2	3	7		2
Not at all proud to be SA	1		1	2	1	1	0	2	2		1

Although most respondents are very proud of being South African, this is less so amongst people in the LSM 1, LSM 8 and LSM 9 categories.

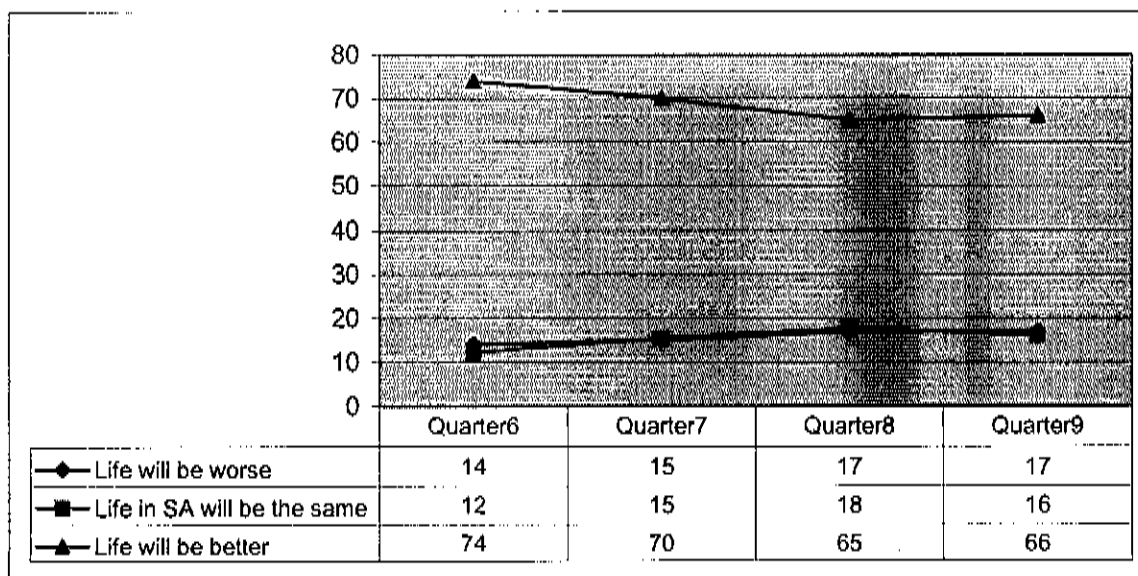
Table 5: Proud of being South African by race

	African/Black	Coloured	White	Asian	TOTAL
Very proud to be South African	73	78	50	67	71
Quite proud to be South African	18	14	32	11	19
Neutral	6	6	14	11	7
Not very proud to be South African	2	2	3	11	2
Not at all proud to be South African	1		1	0	1

Differences were evident between race groups with regard to pride in being South African. The majority of coloured respondents (78%) were very proud to be South African followed by African/black respondents (73%) and Asian respondents (67%). The white respondents were least proud of being South African with only 50% stating they were “very proud to be South African, although a further almost one-third (32%) conceded that they were “quite proud” of this.

In order to determine general quality of life and economic prosperity, respondents were asked retrospectively to compare their life now with how it was 10 years ago. The majority (63%) of respondents stated that their life in South Africa now is better than it was 10 years ago; with 17% stating it is the same and only 21% stating it had worsened. When asked about the future, a similar perception emerged about life in 10 years time, with 67% expecting that it would be better, 17% the same and 17% worse.

Figure 3: Future prospects for life in South Africa.



In terms of future prospects for life in South Africa, 66% of the respondents felt that life in South Africa would be better or much better ten years from now. Positive sentiment decreased from quarter 6 to quarter 8, rising slightly in quarter 9. Less than a fifth (16%) stated that life would be the same in the following 10 years and 17% stated that life would be worse. Responses to this question differed between LSM and race groups.

Table 6: Future prospects by LSM

	LSM1	LSM2	LSM3	LSM4	LSM5	LSM6	LSM7	LSM8	LSM9	LSM10	TOTAL
Life in SA will be much worse	11	3	1	6	7	6	6	28	27	15	8
Life in SA will be slightly worse	4	4	7	5	9	3	16	25	27	18	9
Life in SA will be the same	31	20	13	11	12	21	11	14	20	24	16
Life in SA will be slightly better	40	50	36	36	41	40	39	23	11	33	38
Life in SA will be much better	14	23	43	42	31	30	28	11	14	9	29

The LSM 8 and LSM 9 groups in particular were sceptical about the next 10 years in South Africa with more than 50% of people in these groups stating that life in SA would either be worse or much worse in the next 10 years.

Table 7: Future prospects by race

	African/Black	Coloured	White	Asian	TOTAL
Life in SA will be much worse	5	12	24	14	8
Life in SA will be slightly worse	5	16	28	11	9
Life in SA will be the same	16	22	21	7	16
Life in SA will be slightly better	40	39	23	39	38
Life in SA will be much better	35	11	4	29	29
Don't Know	0	0	0	0	0

The majority of African/Black (75%) and Asian (68%) respondents felt that life in South Africa would be better in the next 10 years. Half of the coloured respondents stated that life in South Africa would be better in 10 years. In contrast, 52% of white respondents stated that life would be worse in the next 10 years.

Table 8: Future prospects by area

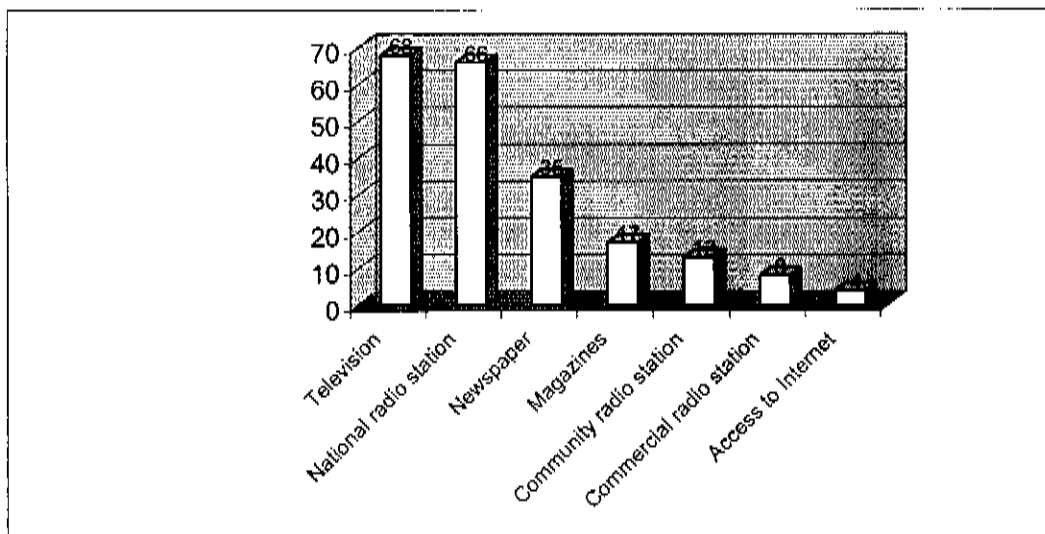
	Metro	Small Urban	Rural	TOTAL
Life in SA will be much worse	13	5	5	8
Life in SA will be slightly worse	11	12	5	9
Life in SA will be the same	13	17	20	16
Life in SA will be slightly better	32	39	42	38
Life in SA will be much better	30	28	28	29
Don't Know	0	0	0	0

Differences between people residing in metro, small urban and rural areas were evident. The people in metro areas seem less optimistic about life in the next 10 years while people in rural and small urban areas seem to be more positive. Sixty two percent of respondents in metro areas felt life in South Africa would improve in the next 10 years compared to 67% in the small urban areas and 70% in the rural areas.

When asked if South Africa belongs to all who live in it, 41% indicated that South Africa absolutely belongs to everyone who lives in it, followed by 22% agreeing to a great degree, 18% agreeing to a slight degree and 16% stating South Africa do not at all belong to who lives in it.

COMMUNICATION

Figure 7: Media exposure during the past 7 days



The highest proportion of people was exposed to television during the past seven days (68%) followed by national radio (66%), newspapers (35%), magazines (17%) and community radio (13%).

Table 18: Exposure to television by LSM

	LSM1	LSM2	LSM3	LSM4	LSM5	LSM6	LSM7	LSM8	LSM9	LSM10	TOTAL
No exposure	92	81	41	30	12	8	7	5	5	3	32
Exposure	8	19	59	70	88	92	93	95	95	97	68

As could be expected the higher LSM respondents were more exposed to television than lower LSM respondents.

Table 19: Exposure to television by area.

	Metro	Small Urban	Rural	TOTAL
No exposure	13	21	56	32
Exposure	87	79	44	68

Rural respondents were markedly less exposed to television than people from metro or small urban areas. African/Black respondents are generally more deprived of any form of media. Nine in ten (93%) white respondents were exposed to television during the past 7 days, followed by coloured respondents (89%), Asian (93%) and African/Black (60%).

Table 20: Exposure to national radio station

	African/Black	Coloured	White	Asian	TOTAL
No exposure	29	66	42	33	34
Exposure	71	34	58	67	66

Two thirds (66%) of respondents indicated that they had listened to a national radio station during quarter 9. The majority of Africans (71%) indicated that had listened to a national radio station during this period followed by Asians (67%), whites (58%) and coloured respondents (34%). The LSM4-10 categories were much more likely to have listened to community radio stations than the LSM1-3 groups. People in metro area were also more likely to have listened to

community radio stations (24%) in comparison with people from small urban and rural areas (7%).

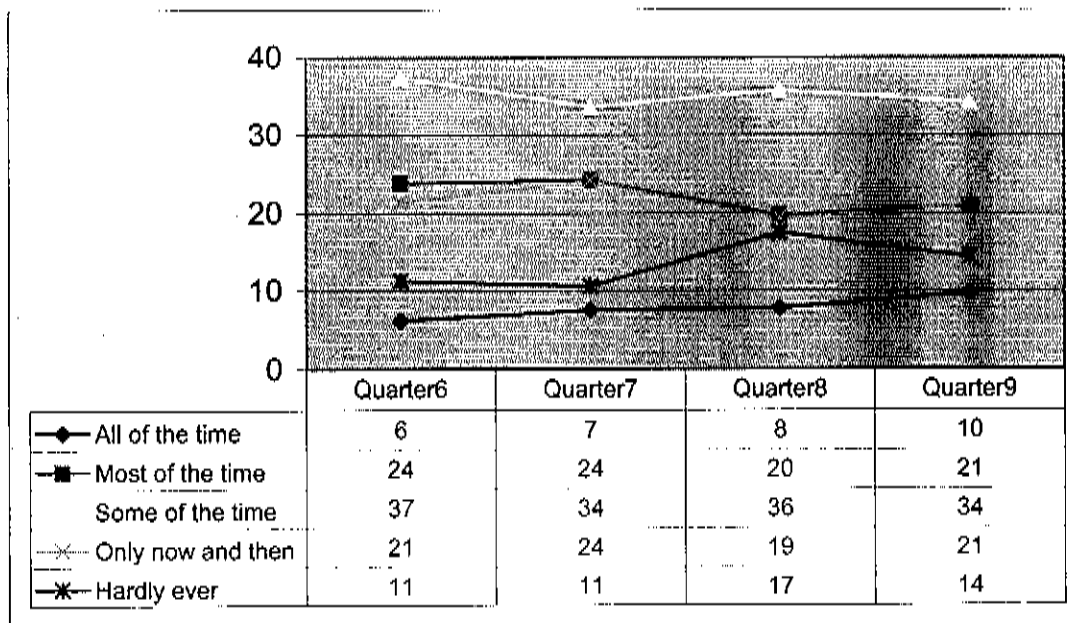
Table 21: Exposure to community radio station

	Metro	Small Urban	Rural	TOTAL
No exposure	76	93	93	87
Exposure	24	7	7	13

In terms of newspapers, higher LSM groups were more likely to have read newspapers. Asians were most exposed to newspapers at 74%, followed by whites (62%), coloureds (52%) and African/black people at 28%. People in metro areas read newspapers most (55%) followed by people in small urban areas (39%) and rural areas (14%).

White respondents read magazines more than the other race groups at 44%, followed by Asians and coloureds (41%) and Africans/blacks (10%). White respondents were much more exposed to the Internet during this period at 19%, followed by Asians (7%), coloureds (2%) and African/Blacks (1%). Magazine reading was more prevalent amongst higher LSM respondents.

Figure 8: Following of government activities



During quarter 9, 10% of respondents followed what government was doing all the time, 21% followed most of the time, 34% followed some of the time, 21% followed only now and then and 14% hardly ever followed what government was doing.

Table 22: Following of government activities by LSM

	LSM1	LSM2	LSM3	LSM4	LSM5	LSM6	LSM7	LSM8	LSM9	LSM10	TOTAL
All of the time		3	7	9	16	16	11	12	7	18	10
Most of the time	13	13	12	18	31	29	32	21	32	15	21
Some of the time	24	21	44	42	29	34	34	40	27	45	34
Only now and then	28	37	24	18	16	15	17	16	20	12	21
Hardly ever	35	27	13	13	8	6	6	12	14	9	14

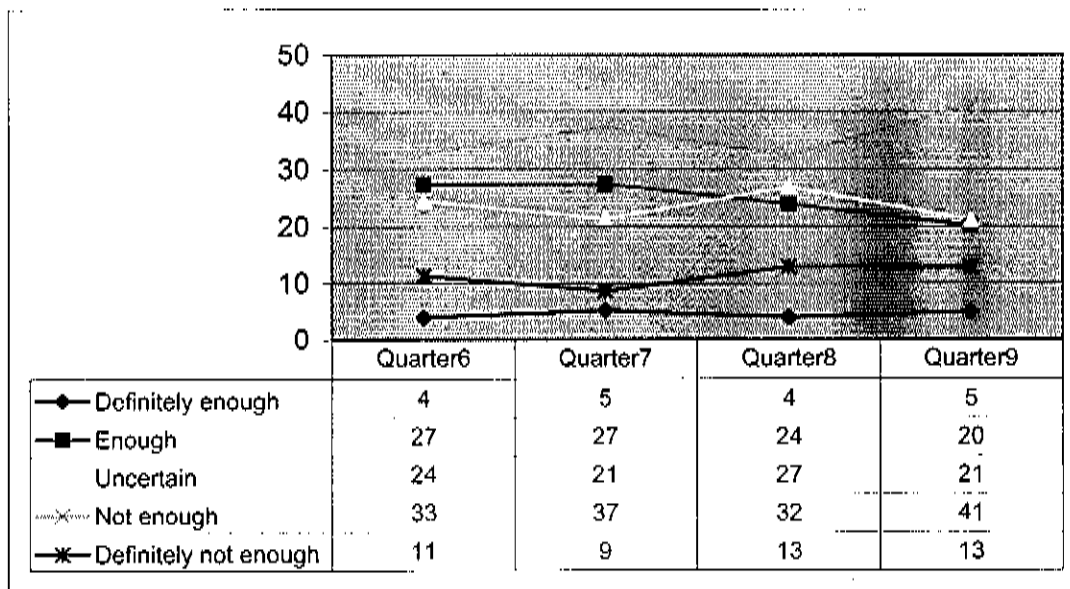
Higher LSM respondents seem to follow government's activities more than lower LSM respondents.

Table 23: Following of government activities by area

	Metro	Small Urban	Rural	TOTAL
All of the time	14	12	4	10
Most of the time	27	24	13	21
Some of the time	35	40	30	34
Only now and then	16	14	30	21
Hardly ever	8	10	23	14

People residing in metro areas tend to follow government activities more frequently than people from small urban and rural areas.

Figure 9: Level of government information required



During quarter 9, 5% of respondents stated that they definitely had enough information from government, 20% had enough information, 41% did not have enough and 13% definitely did not have enough. The rest (21%) remain uncertain about the issue.

Table 24: Level of government information by LSM

	LSM1	LSM2	LSM3	LSM4	LSM5	LSM6	LSM7	LSM8	LSM9	LSM10	TOTAL
Definitely enough		2	1	3	8	8	7	9	4	9	5
Enough	11	18	10	19	23	30	29	17	27	21	20
Uncertain	23	17	17	21	21	25	27	26	16	24	21
Not enough	26	44	59	42	40	33	32	41	47	39	41
Definitely not enough	40	19	13	15	7	5	5	7	7	6	13

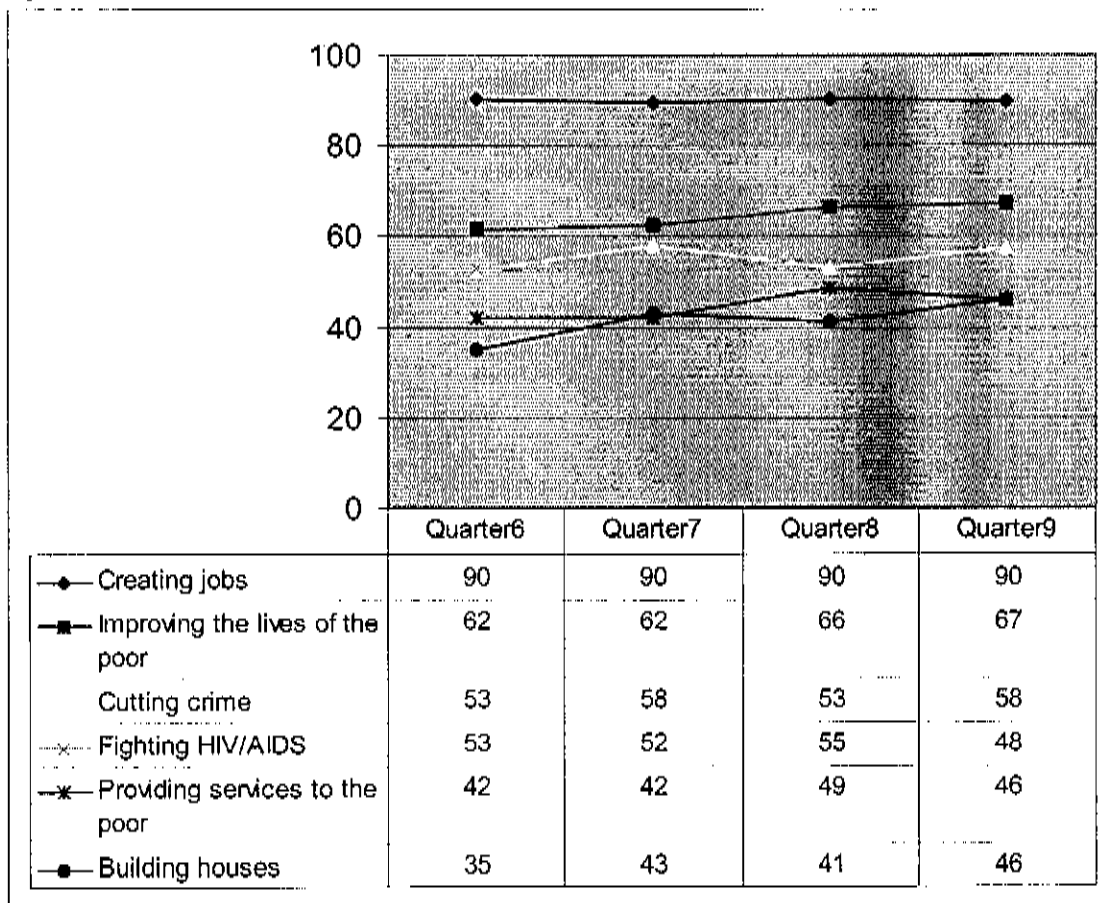
Lower LSM respondents need more information from government than high LSM respondents.

Table 25: Level of government information by area

	Metro	Small Urban	Rural	TOTAL
Definitely enough	10	4	1	5
Enough	25	19	16	20
Uncertain	24	25	17	21
Not enough	35	41	48	41
Definitely not enough	7	11	19	13

Forty two percent of people in metro areas, 52% in small urban areas and 67% of people in rural areas felt that they did not get enough information from government.

Figure 10: Five most important government communication topics



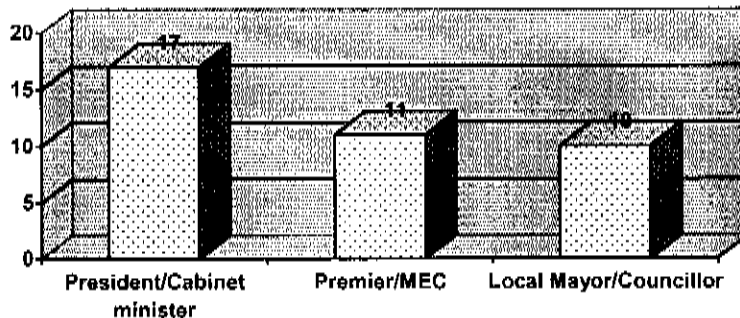
The five topics about which people most want information on are job creation, improving the lives of the poor, reducing crime, fighting the spread of HIV/AIDS, building houses and providing services to the poor. Other topics that were also mentioned but not as frequently were fighting the spread of HIV/AIDS (48%), improving health services and fighting corruption (both 31%), providing training and skills development (23%), distributing social grants (12%), protecting human rights, how to take advantage of opportunities provided by government and managing economic growth (all at 9%) and black economic empowerment (7%).

African people in small urban and rural areas, with lower LSM scores generally indicated a greater need for information on “job creation” and “improving the lives of the poor”. Coloured (52%) and African people (50%) expressed a greater need for information on housing than did the Asian (26%) or white (21%) groups. The need for information on housing was also more prominent amongst the lower LSM respondents. More than half of the rural respondents (55%) expressed a need for information on housing followed by metro residents (43%) and small urban respondents (36%). African, rural and lower LSM respondents were far more interested in receiving more information on “providing services to the poor” than were other respondents.

Asians (78%), whites (75%) and coloureds (72%) expressed a need for information on crime reduction. People in the high LSM categories also expressed the need for more information on

crime. More people in metro areas expressed a need for information on crime reduction did than people in other areas.

Figure 11: Awareness of government issues from the President/Cabinet minister, premiers or local mayors and councillors.



Just less than a fifth of respondents were aware of government issues by virtue of the President or a Cabinet Minister saying something (17%), from a Premier/MEC (11%) and from a local Mayor/Councillor (10%).

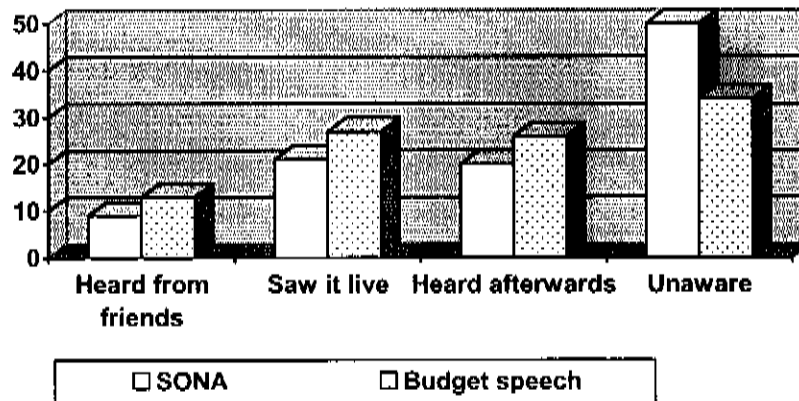
People more likely to have heard/read something the President or Cabinet Minister said were people from the LSM9/10 group (28%), English speakers (28%), people with a post matric qualification (34%), those who regularly follow government activities (28%), whites (32%), and people with a higher than average personal income (34%). The channels by which the people were informed about government issues by means of a president or cabinet minister were television (79%), newspapers (27%), national radio (36%) word of mouth (7%) and community radio (7%).

People more likely to have heard/read something a Premier or MEC has said were people from the LSM7/8 group (16%), those who regularly follow government activities (23%), those from small urban areas (16%) and those with a matric qualification (16%). The communication channels by which people heard or read something from a premier or MEC were television (62%), national radio (47%), newspapers (26%), word-of-mouth (9%) and community radio (5%).

People more likely to have heard/read something by a mayor or councillor were more likely to be from the Eastern Cape (21%) and North West (22%) and reside in rural areas (14%). The channel of communication was typically word of mouth (44%), Imbizo (22%), national radio (20%), TV (16%), newspapers (14%), community radio (6%) pamphlets/posters (5%) and multi-purpose community centres (5%).

Two-fifths of respondents indicated that they were aware of the Imbizo campaigns. These respondents were typically rural, from the Eastern Cape or KwaZulu-Natal. Imbizos hosted at local level where the Mayor or Local Councillors are present, are attended the most.

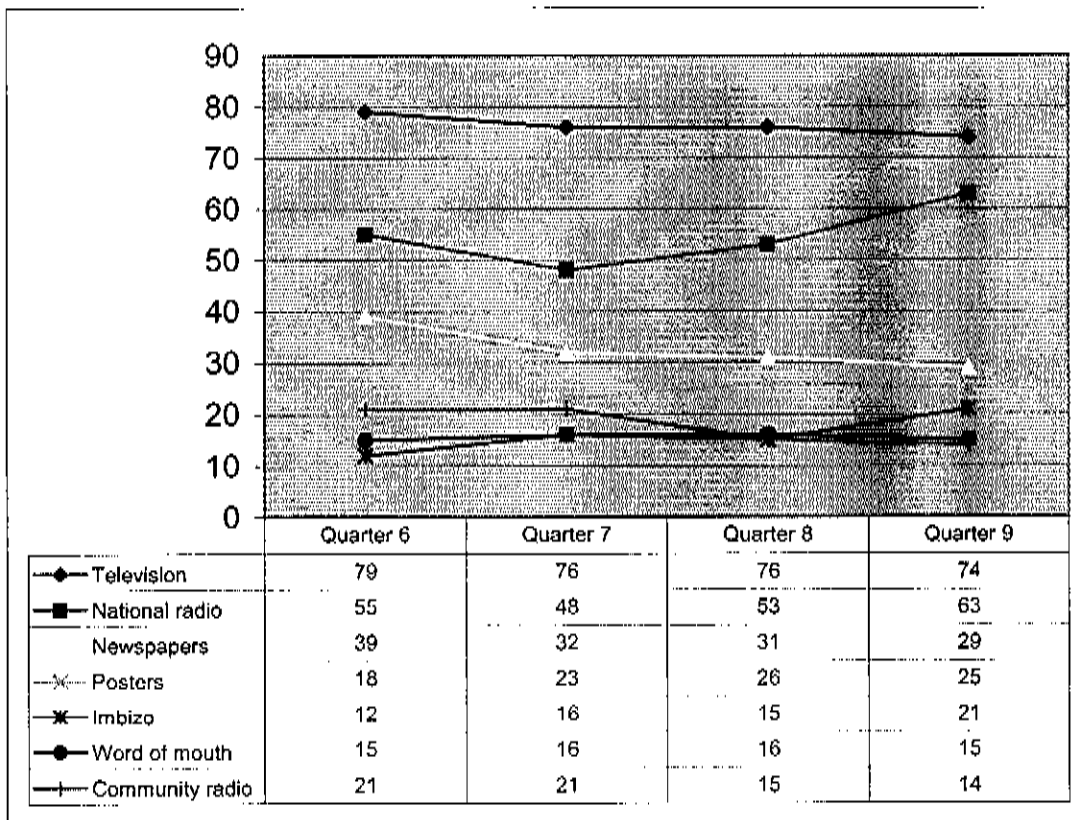
Figure 12: Awareness of the State Of the Nation Address and Budget speech.



More people were aware of the Budget Speech than the 2005 State of the Nation Address (SONA 2005). Half of the people were unaware of the 2005 SONA and a third were unaware of the Budget Speech. Respondents that were unaware of the 2005 SONA were typically rural (62%), from KZN (58%) or Limpopo (62%) LSM 1/3 (66%), female rural (63%) and people with primary level schooling (61%). They also generally tended not to follow government activities (81%). The respondents that were aware of the 2005 SONA cited television (62%) as the main source of awareness, followed by national radio (29%), word of mouth (25%) and newspapers (16%).

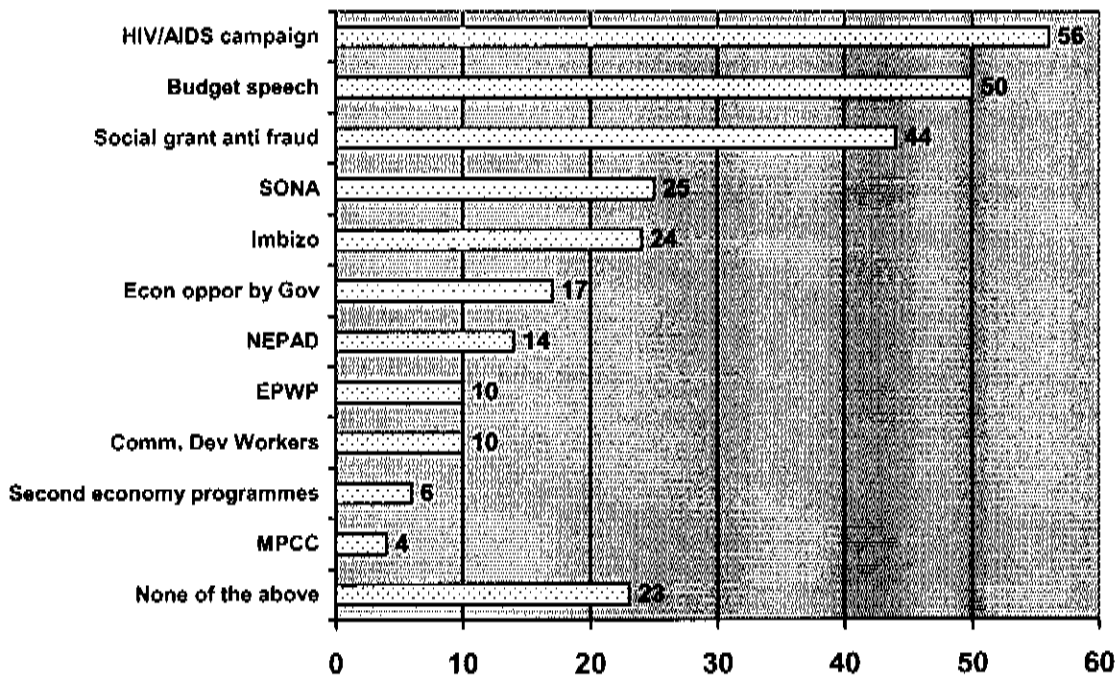
People typically unaware of the budget speech were rural (42%), from Eastern Cape or KwaZulu-Natal (42%), LSM1/3 (45%), with primary school education (57%), and people who generally never follow government activities (61%). Those that were aware of the Budget Speech indicated the sources of awareness as television (56%), national radio (31%), word of mouth (28%) and newspapers (12%).

Figure 13: Best ways to be informed by government



Overall, the majority of respondents (74%) indicated television as the best way to be informed by government. National radio was preferred by 63%, followed by newspapers (29%), pamphlets/posters (25%), Imbizos (21%) word of mouth (15%), community radio (14%), loose inserts (8%), regional/commercial radio (5%), and outdoor media (5%).

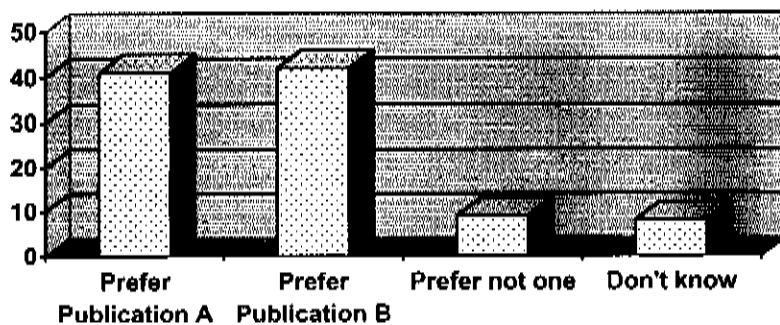
Figure 14: Aided awareness of government communication initiatives



Respondents that were aware of the various programmes typically had an LSM of 7 or higher, had a post matric qualification, resided in a metro areas and had a higher than average income.

Those respondents (23%) who were unaware of government programmes were mostly amongst LSM1/3 respondents (33%), from KwaZulu-Natal (34%), female rural (31%), with children at home (27%), with primary school education (34%), those who hardly ever follow government activities (52%) and residents of rural areas (31%). It therefore seems that the prime target market of the various initiatives remain unaware and uninformed about government activities.

PUBLICATION PREFERENCE



Publication A was preferred by 41% of the respondents and Publication B by 42% of respondents. Less than a tenth (9%) indicated that they liked neither publication and 8% were uncertain.

The respondents that preferred publication A were highly represented in the Eastern Cape (57%) and North West (62%) and amongst people in the LSM 1/3 category (47%). They were

likely to be female rural residents (56%), African (46%), isiXhosa speakers (54%) or people with a primary school education (49%).

Those respondents that preferred publication B were highly represented amongst those from small urban areas (54%), those residing in the Western Cape (64%), Afrikaans speakers (61%), coloured people (68%), people in the top LSM 9/10 category (56%), and people who regularly follow government activities (49%).

OBSERVATIONS

Mood levels and general satisfaction levels peaked during the election period (quarter 6). Although these levels have subsequently declined, positive sentiment remains higher than it was in early 2004. Differences between LSM groups, race groups and areas where people reside were evident for most indices.

Signs of impatience with government's pace of change were evident. Housing and community basic services as perceived challenges have increased quarter on quarter while government's efforts regarding health as a challenge are acknowledged.

People with low-income levels, low LSMs and those who reside in rural areas with limited or no schooling are more likely than other categories to be unaware of government communication initiatives.

In less urbanised provinces and amongst lower LSM groupings word-of-mouth (friends, family etc.), face-to-face meetings with government officials and Imbizos contribute more to awareness of key communication initiatives.

Awareness of key initiatives, notably the State Of the Nation Address and the Budget speech has remained the same for the 3-year period.