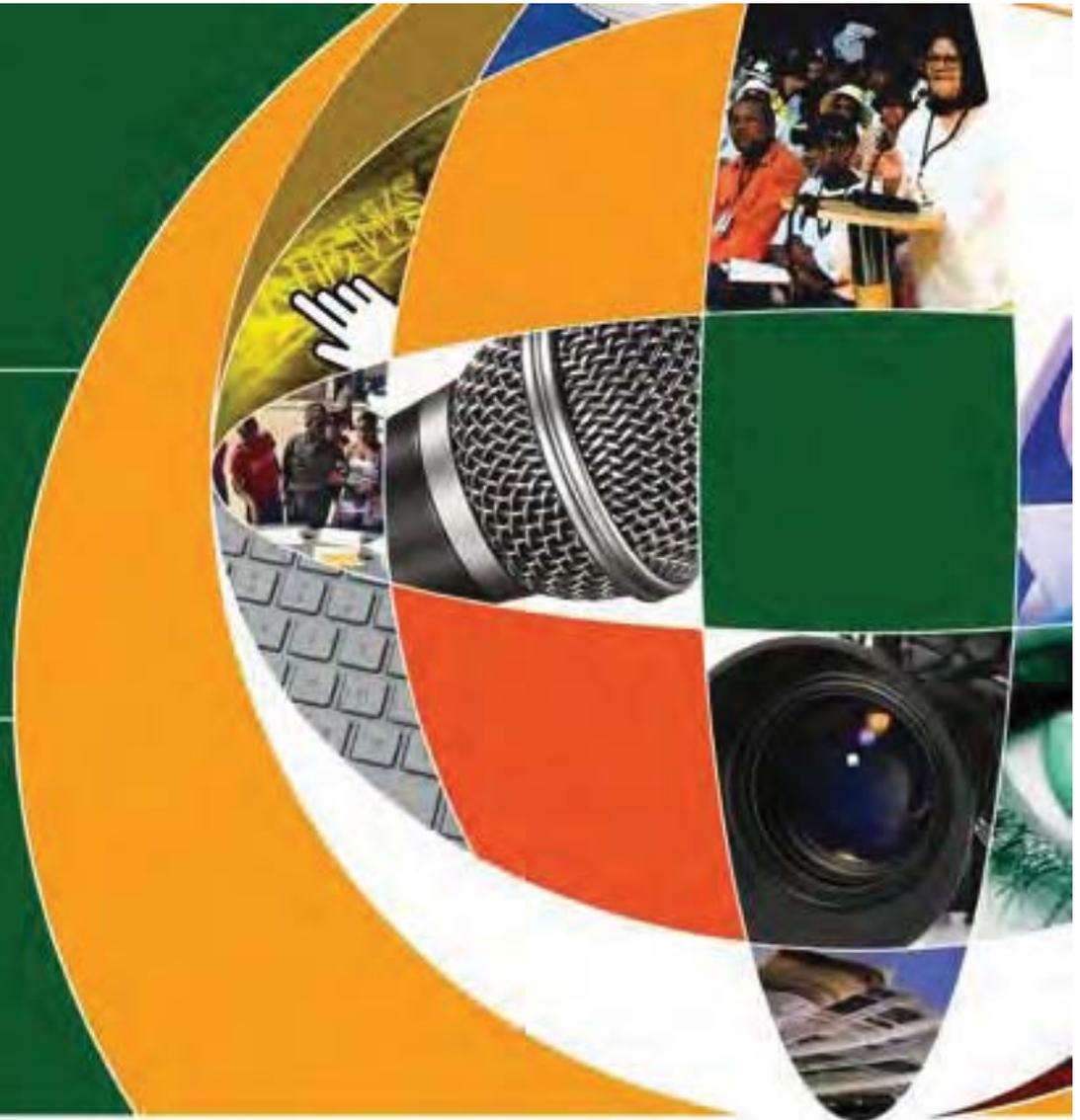


GOVERNMENT SEGMENTATION MODEL: Beyond LSM

Prepared by GCIS Directorate:
Research & Knowledge Management

March 2016



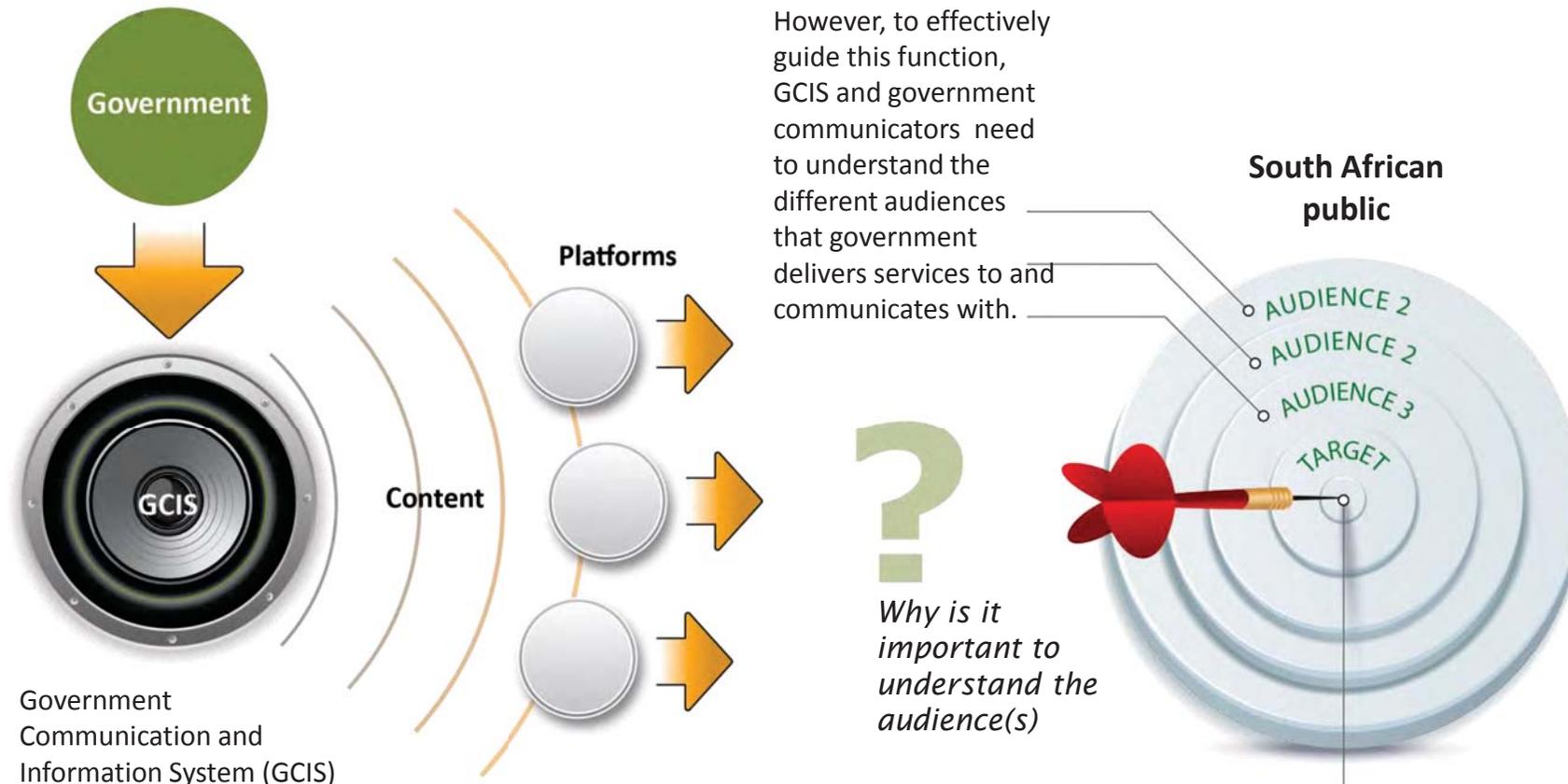
government
communications

Department:
Government Communication and Information System
REPUBLIC OF SOUTH AFRICA

PRESENTATION OUTLINE

- Present a segmentation model for government
- Main purpose to pursue segmentation
- Construction of the model
- Benefits of segmentation in understanding audiences, information needs and their views on government performance areas
- Profile of segments for communication purposes

INTRODUCTION



Government Communication and Information System (GCIS) plays a key role in the national communication and media space.

To implement its strategic objectives, GCIS develops content and creates platforms to grow the voice of government to ensure that the South African public is aware of its work and achievements.

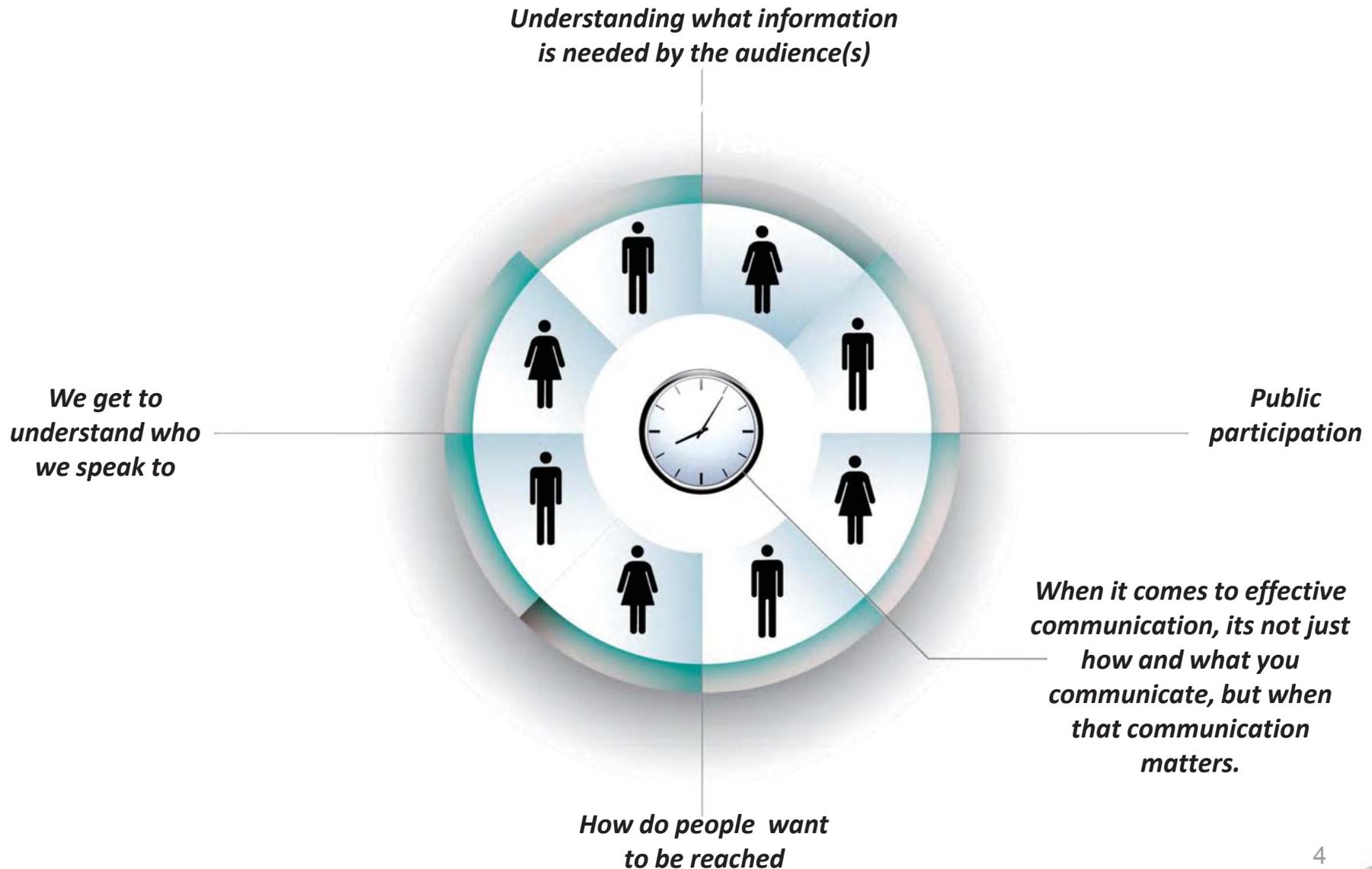
However, to effectively guide this function, GCIS and government communicators need to understand the different audiences that government delivers services to and communicates with.

?
Why is it important to understand the audience(s)

The success or failure of any communication campaign is ultimately determined by whether the message managed to reach the target audience(s) and whether it has made its mark to the audience(s). Segmentation also helps to have targeted communication approach...



HOW SEGMENTATION HELPS WITH A TARGETED COMMUNICATION APPROACH?

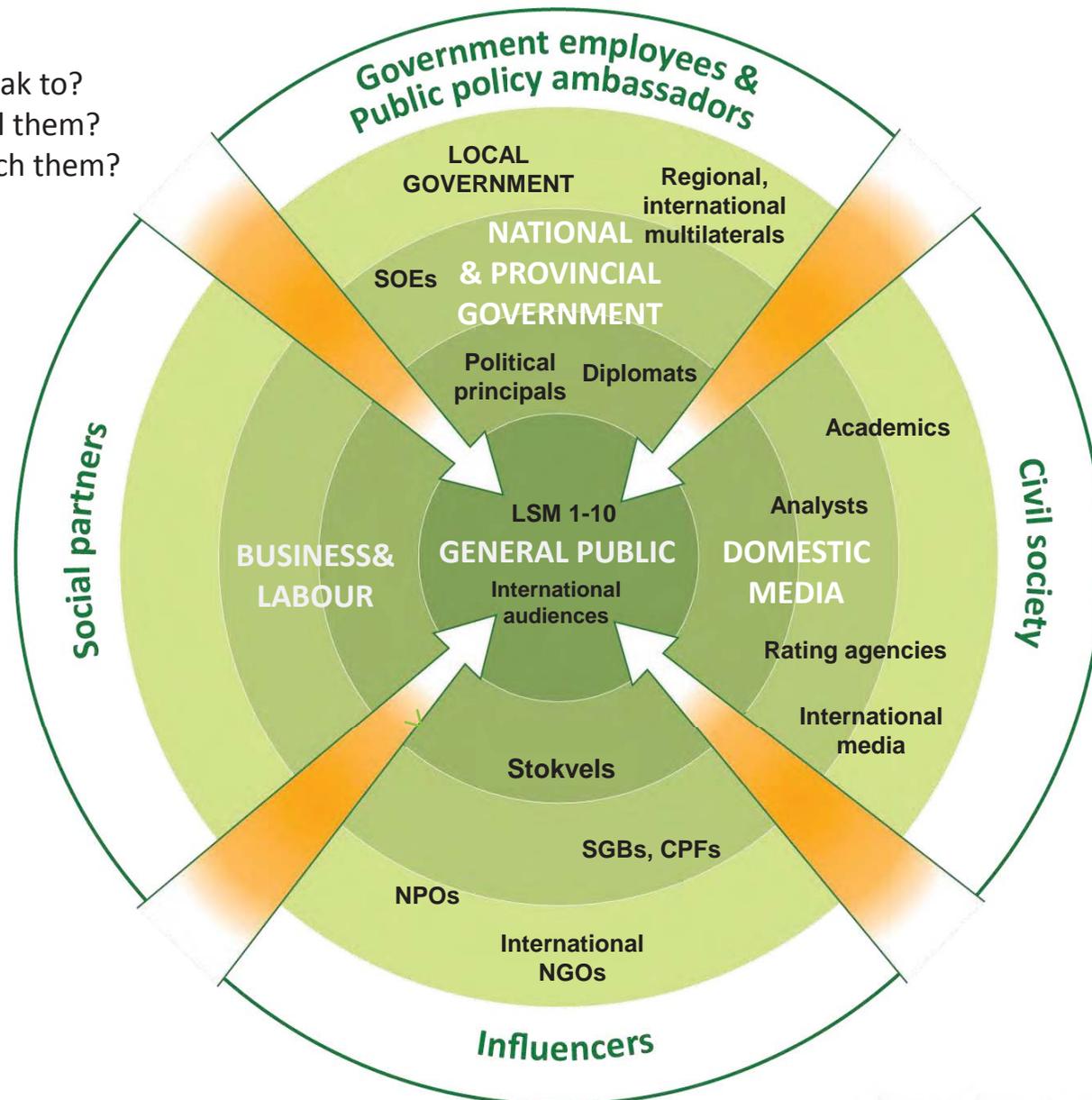




AUDIENCE MAP CONCEPT: SEGMENTATION

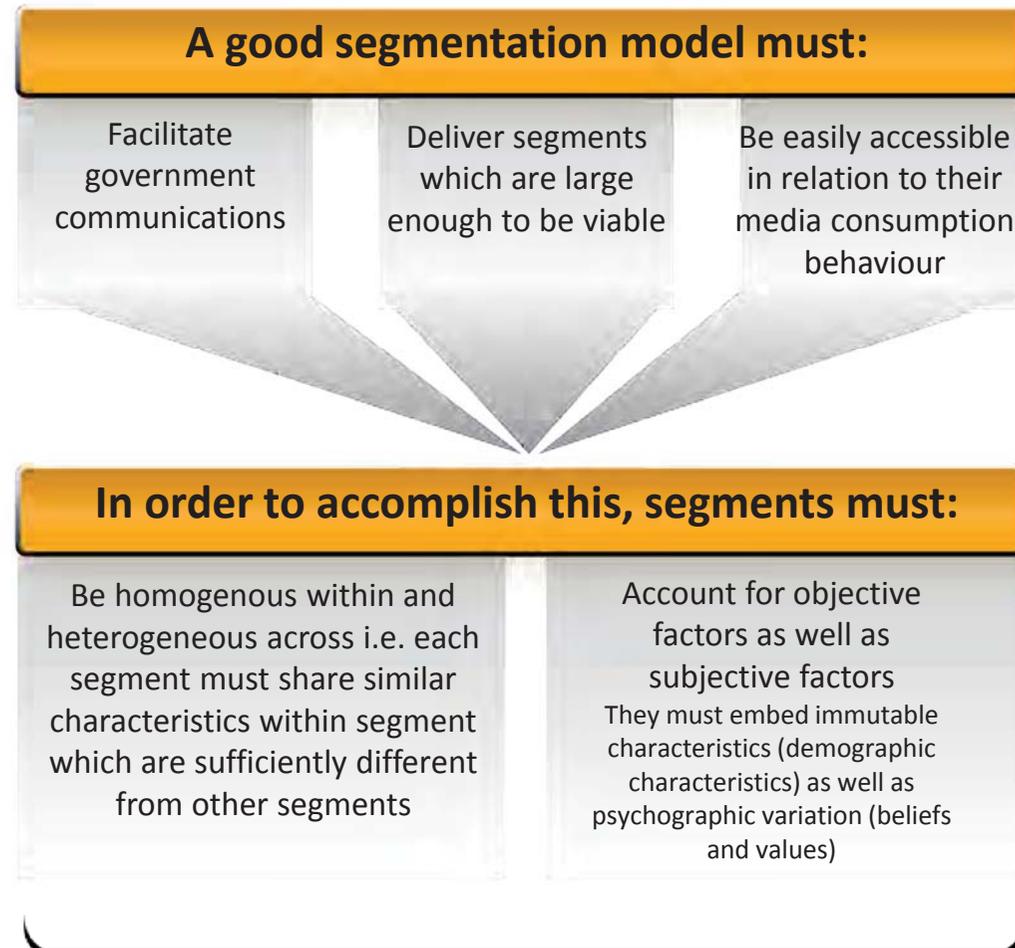
PURPOSE

- Who do we speak to?
- What do we tell them?
- How do we reach them?



PURPOSE OF SEGMENTATION

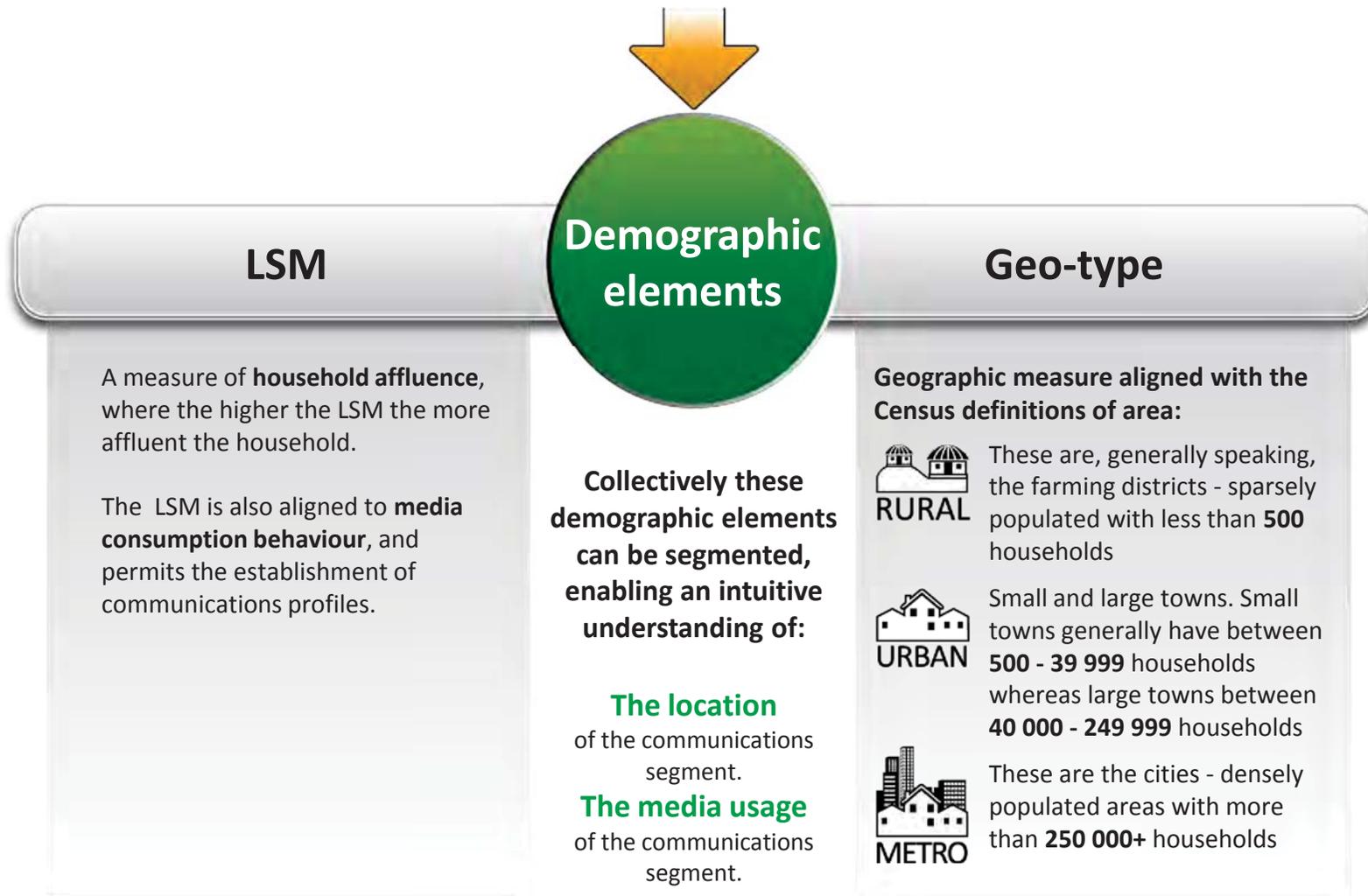
To divide a population into different government audience groups which hold defined sets of properties.



A successful segmentation model must unify these elements.

SEGMENTATION VARIABLES

First steps: Discriminating factors important for government communications



SUBJECTIVE SEGMENTATION VARIABLES

The selection of subjective segmentation elements (psychographics) required the implementation of complex statistical techniques in order to filter the principle beliefs which distinguishes between various other beliefs and performance evaluations

The statistical techniques applied included:



Factor analysis

This is a form of data reduction. The technique allows the grouping of evaluations into statistically valid constructs.



Reliability analysis

This establishes a measure of the robustness of the measures being used.



Correlation analysis

This establishes the strength of the relationship between belief elements.



Indicator analysis

This allows for the computation of composite variables that encompass a range of attitudinal ratings into a single composite score. These scores can then be used as the basis of belief / psychographic segmentation.



SUBJECTIVE SEGMENTATION VARIABLES cont.

Psychographic elements

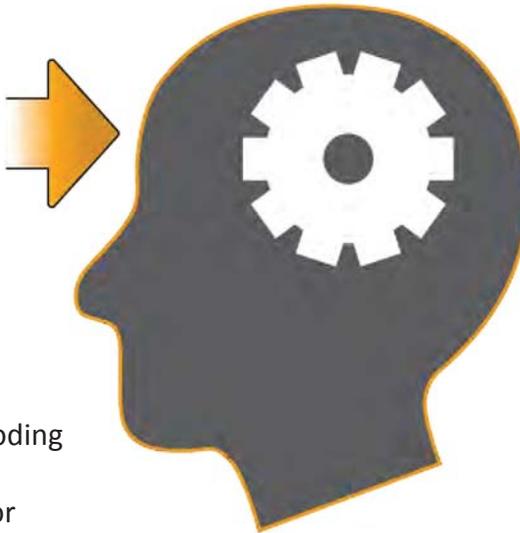
beliefs / attitudinal ratings

All psychographic elements were tested for their viability in discriminating between groups.

The psychographic variables (beliefs / attitudes) were prepared [through a recoding exercise] in order to establish a measure which included all citizens [accounting for negative, neutral and positive ratings]

These variables were then subjected to a factor analysis. The established 9 factors, which cover the broader performance evaluation categories.

The factor elements were subject to a correlation analysis in order to...



factor analysis



correlation analysis



Determine the degree of interrelation between the elements.



EXPLORING SEGMENTS BY VIEWS

- ➔ In trying to understand the segments views better, indices had to be developed on performance indicators using factor analysis.
- ➔ Factor analysis assisted with reduction of explored elements into a single score measuring a priority area.
- ➔ Through this analysis all questions that were found to measure the same construct were drawn together into a single index measure i.e. health, jobs, infrastructure etc. aligned to government priorities.



INDEX DEVELOPMENT

Jobs Index

Creating jobs
Narrowing the income gap between rich and poor
Making it easier for people to find a job
Making it easier for people to start a small business
Making it easier for businesses to create

Economy Index

Managing the economy
Ensuring that prices remain stable
Protecting workers rights

Infrastructure Index

Providing water and sanitation services
Providing a reliable supply of electricity
Maintaining roads and bridges

Infrastructural Services Index

Ensuring that everyone has enough clean water

Education Index

Training teachers
Addressing educational needs
Increasing supplies for schools such as textbooks

Welfare and Poverty Index

Improving the living standards of the poor
Distributing welfare payments to those who are entitled to them
Providing social welfare services
Promoting access to land
Supporting community development initiatives and strengthening community organisations
Providing support to people who have acquired land to become farmers

Health Index

Combating and treating HIV/AIDS
Combating and treating TB
Improving primary health care services at clinics
Improving the quality of service at public hospitals
Expanding the access of poor people to health care
Improving children's health through things like vaccines
Providing primary health care services such as home-based care

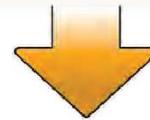
Crime and Corruption Index

Making South Africa a safer place to live in
Making public spaces such as schools, churches, mosques etc. safe
Arresting criminals
Prosecutors and courts putting criminals in jail
Rehabilitating criminals so they can lead normal lives when they come out of jail
Reducing corruption by public servants/ government officials

SUBJECTIVE SEGMENTATION VARIABLES cont.

Three critical psychographic elements...

...that discriminated between all other beliefs and attitudes were determined to be the ratings of:



Single index score

These three critical psychographic elements were reduced to a single index score – referred to as the

'quality of leadership and national unity' indicator

NB: the general performance evaluation categories i.e.

- Education,
 - Health,
 - Rural Development and Food Security,
 - Human Settlements,
 - Employment and Growth,
 - Crime Prevention and Security, Infrastructure etc.
- remained exogenous.**

exogenous

The individual performance evaluation categories do not form part of the 'quality of leadership and national unity' indicator – but are significantly correlated

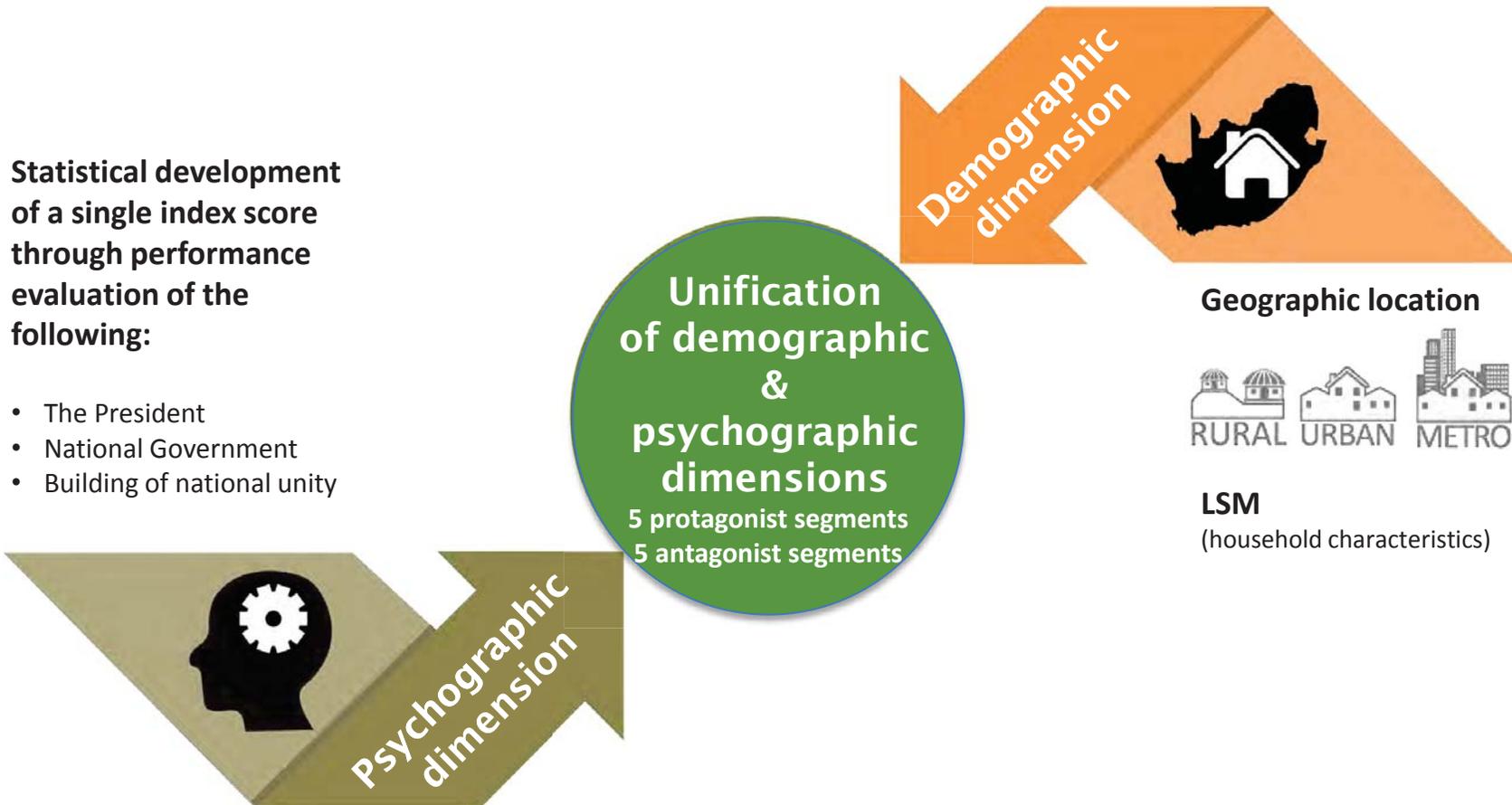


HOW THE SEGMENTATION PROTOTYPE WAS DEVELOPED

A multi dimensional model approach was applied using a quantitative tracking research project data – which assisted in developing a more complete understanding of the audiences within a communication environment facing government

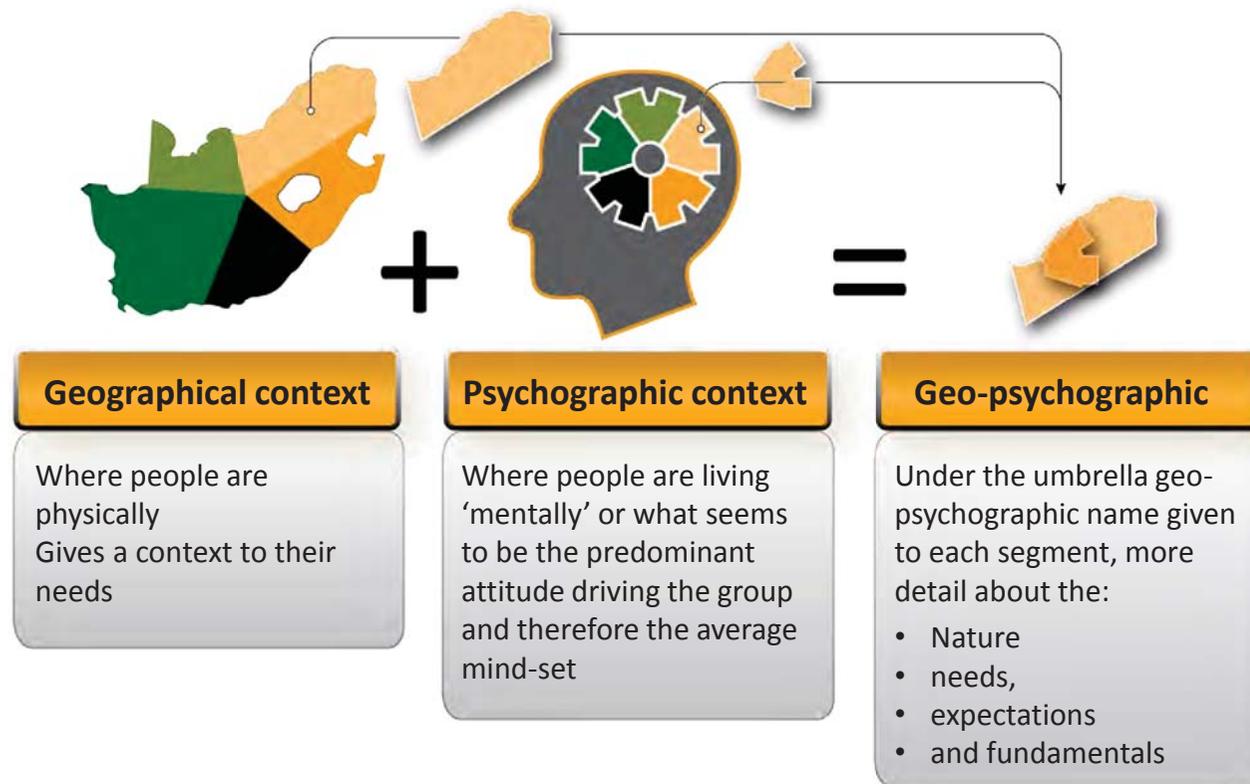
Statistical development of a single index score through performance evaluation of the following:

- The President
- National Government
- Building of national unity



WHAT'S IN THE NAME OF EACH SEGMENT?

Segments are named using:



MODEL OUTPUT OVERVIEW: FIVE SEGMENTS

The largest communication segments



S1 - Rooted Realists



S2 - City seekers



S3 - Safely suburban

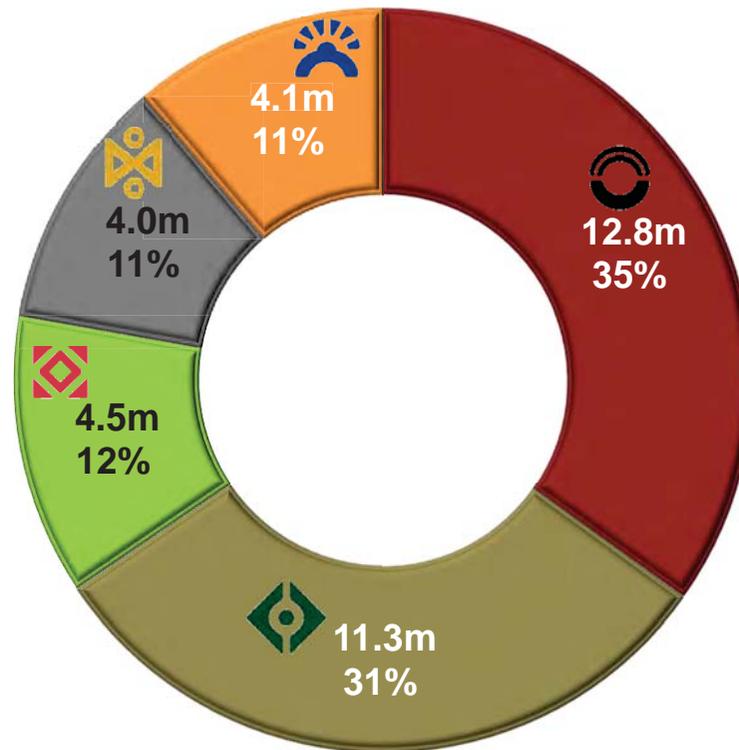


S4 - Metro mobiles



S5 - Cosmopolitan capital

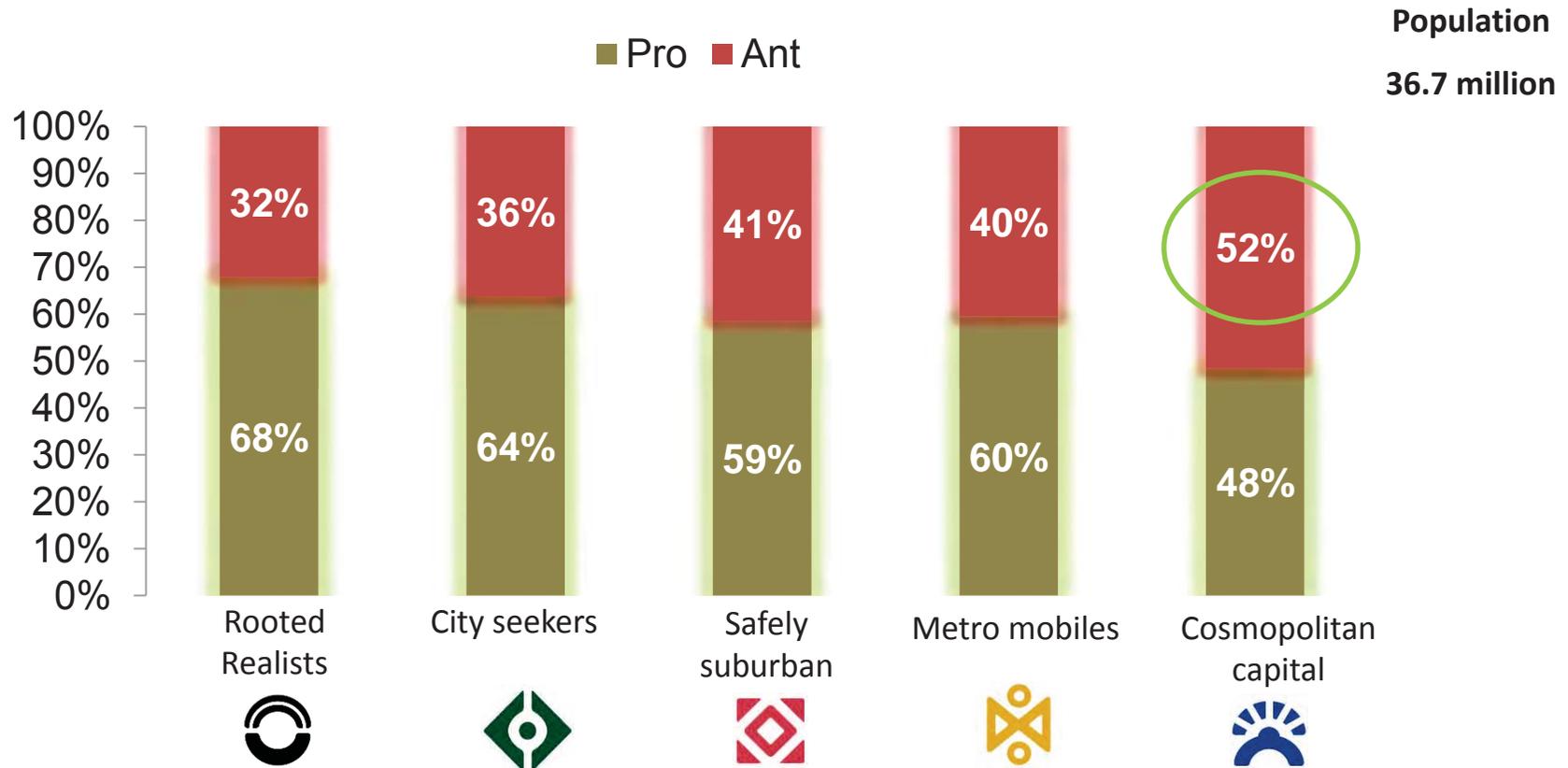
Weighted population size forming the basis of the analysis 36.7 million representing 15 years and above South Africans



- From the study population two groups emanated and differentiated by views – the protagonists (62%) and the antagonists (38%).
- Further analysis also indicated the existence of both protagonists and antagonists within the segments.



MODEL OUTPUT OVERVIEW: SPLIT VIEWS WITHIN THE FIVE SEGMENTS



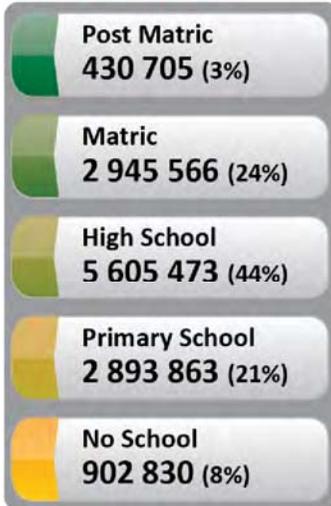
- S1 (Rooted) and S2 (City seekers) have the highest proportion of protagonists – **68% and 64%** respectively.
- While the S5 (Cosmopolitan capital) only represents **11%** of the population, as a segment it contains the highest proportion of antagonists (**52%**)



S1 – ROOTED REALISTS



EDUCATION



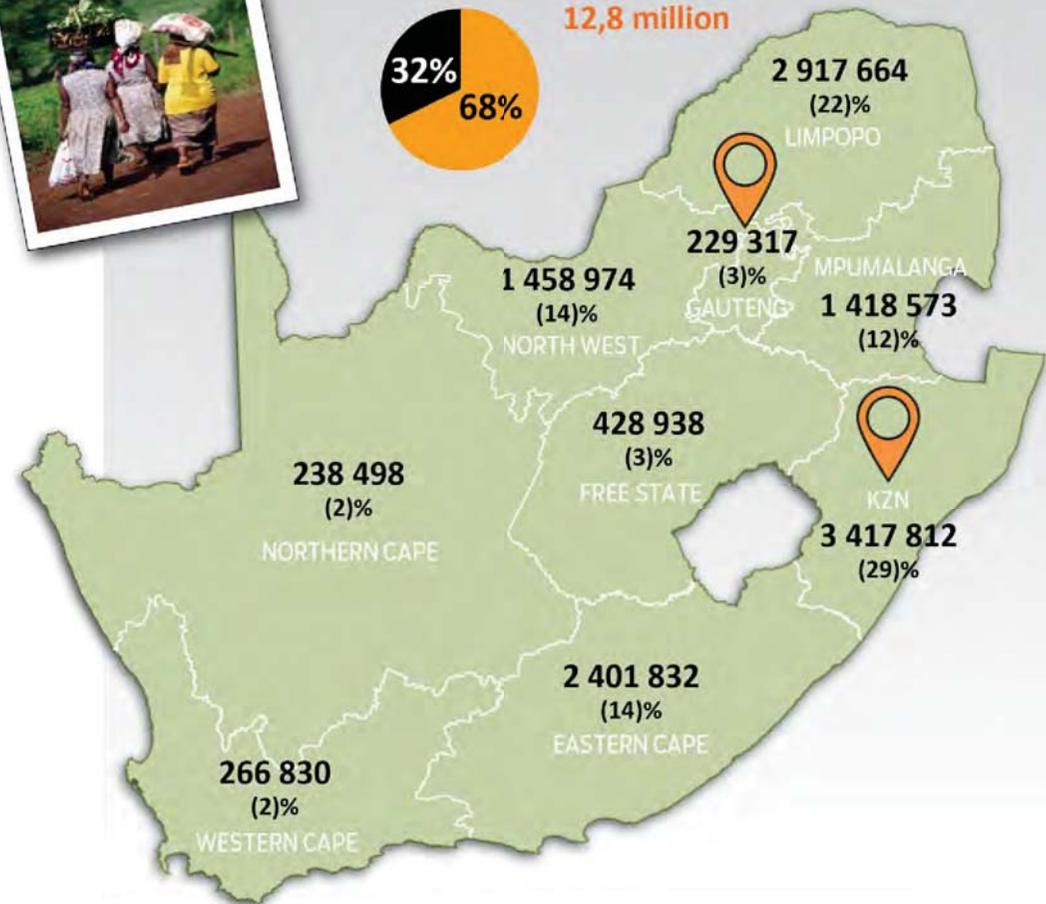
LSM



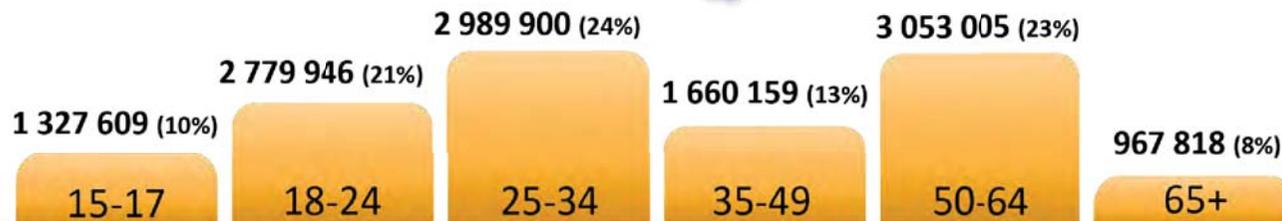
GENDER



Antagonists 4,1 million
Protagonists 8,7 million



AGE

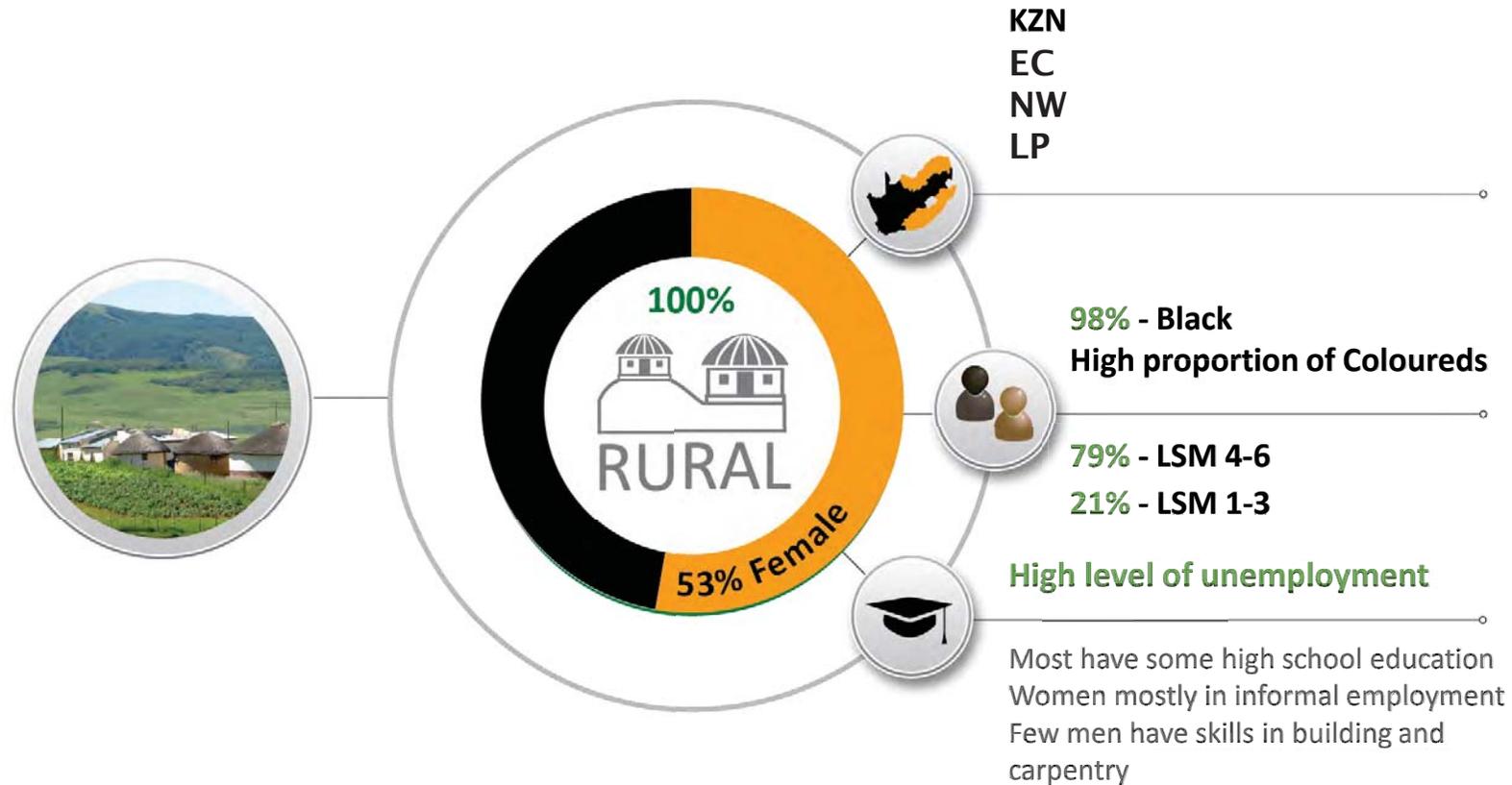


20





S1 – ROOTED REALISTS: Prominent features





S1 – ROOTED REALISTS: Profile

ROOTED REALISTS



12.8 MILLION



Poor, rural Africans, mainly from Limpopo, KZN, NW, EC. Community orientated and religious. High unemployment and lower education. Extremes of young and old people. All speak an African language. Most interested in government affairs and most supportive of government.

35%

Population

68%

32%

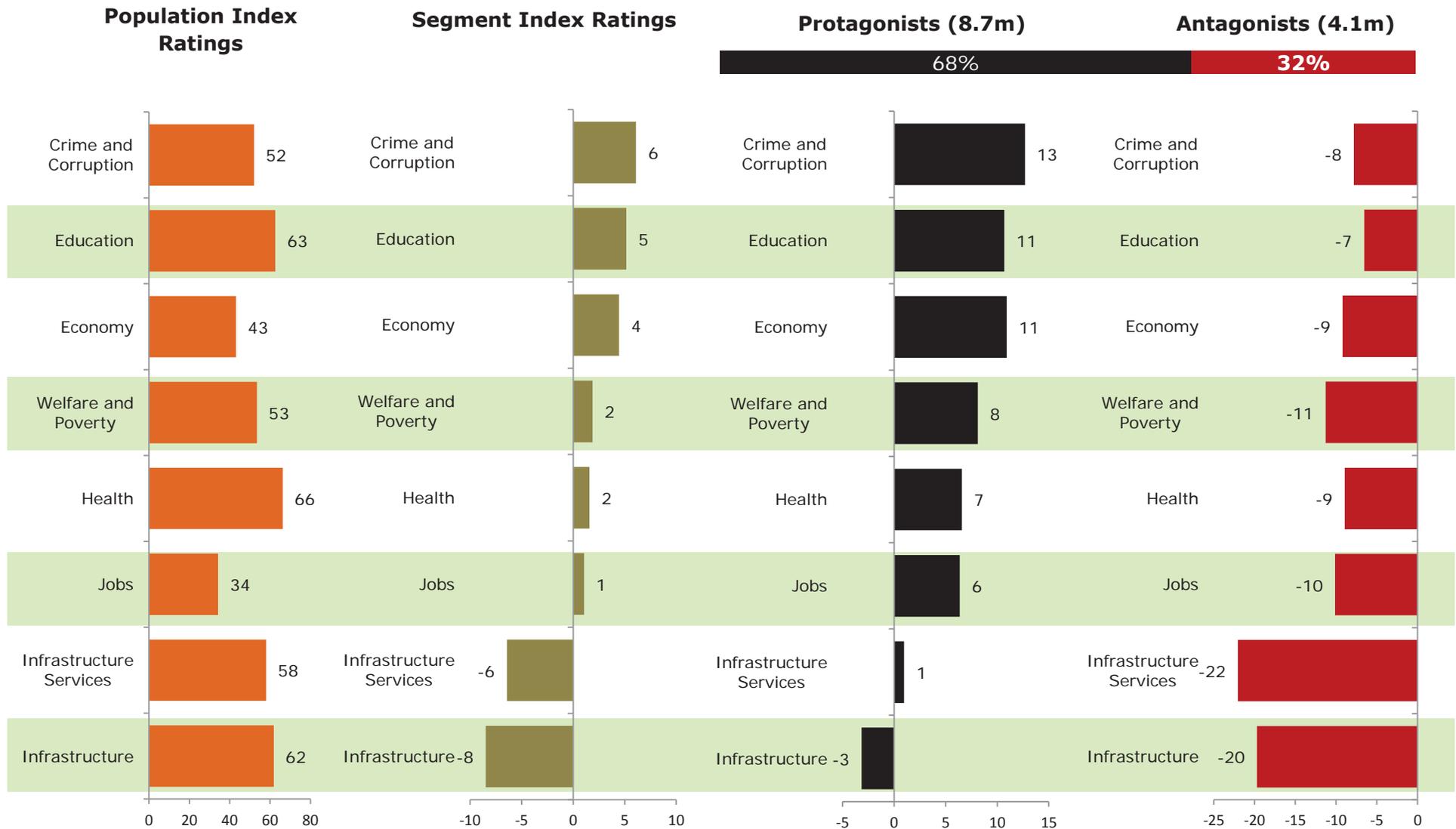
PROTAGONIST

ANTAGONIST

- ➔ Majority belong to **burial societies** and **rely** on both **traditional** and **municipal structures** within their communities.
- ➔ The people in this segment are generally **positive about their lives** and acknowledge they come a long way. However, their optimism and hopefulness is challenged by **extremely difficult financial circumstances** (most of the people in the segment are **beneficiaries of government social grants**) and high **unemployment**.
- ➔ Most people in this segment have high school education. A fifth have some primary school education only and just less than a fifth completed matric.
- ➔ There is a feeling amongst this segment that not much is to celebrate without financial independence or prospects of having a job – so there is a **feeling of ‘empty promises’**, as they are unsure about ways to continue improving on quality of life.
- ➔ They are **concerned about poverty** and high levels of **unemployment**, see that as leading to high levels of crime. They see poor levels of education(due to lack of resources and financing of education) as part of reasons for uncontrollable criminal behaviour.
- ➔ **Social grants are appreciated** as financial relief to assist with basic needs as most are beneficiaries.
- ➔ The youth is of the view that job initiatives and good educational facilities in the rural areas would be the solution to demotivated and demoralised youth – especially males.
- ➔ They are looking forward to a future where they live a good life and experience the changes they are waiting for. **They belong to political parties** but **less active**. **Highly inclined to attend community events**.



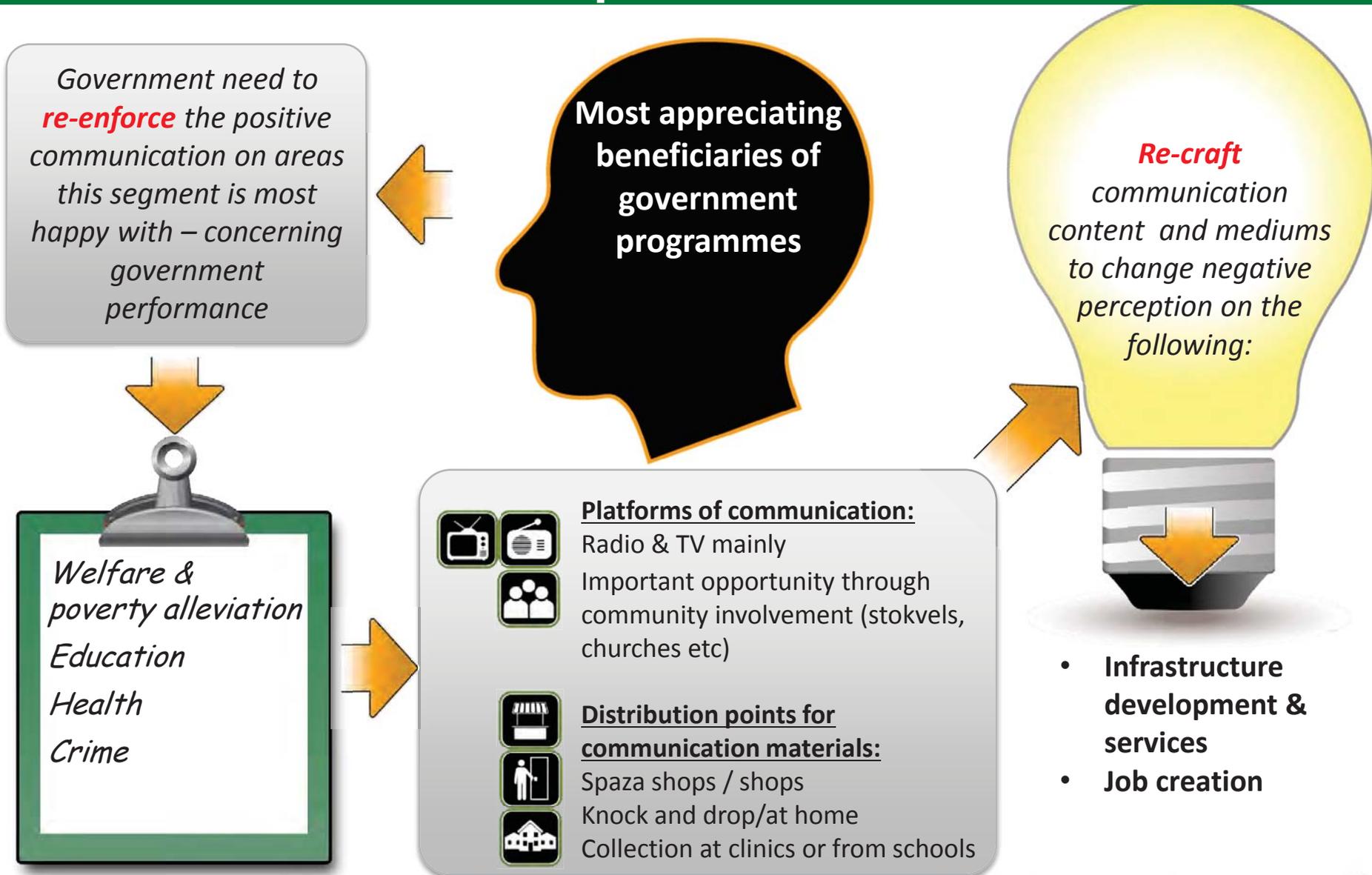
S1 - ROOTED REALISTS



Note: the index measures denotes the deviation from the overall population mean



S1 – ROOTED REALISTS: Communication implications

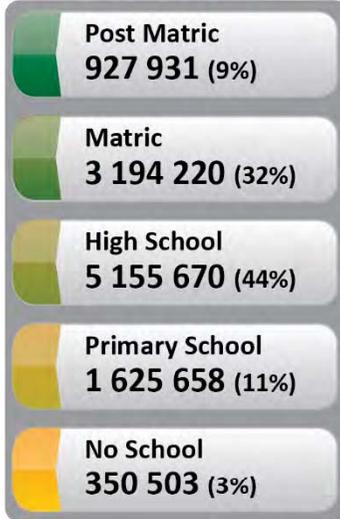




S2 – CITY SEEKERS



EDUCATION



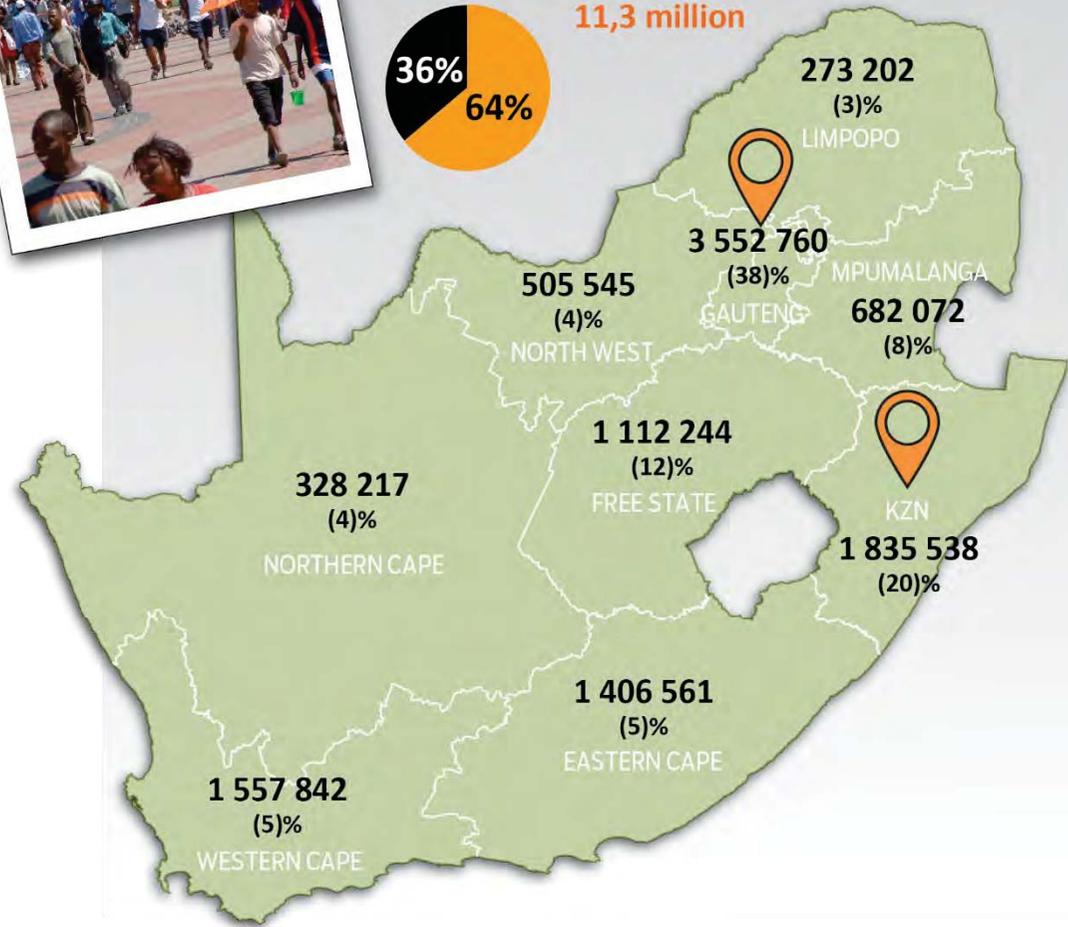
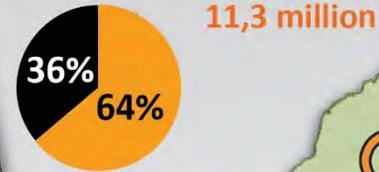
LSM



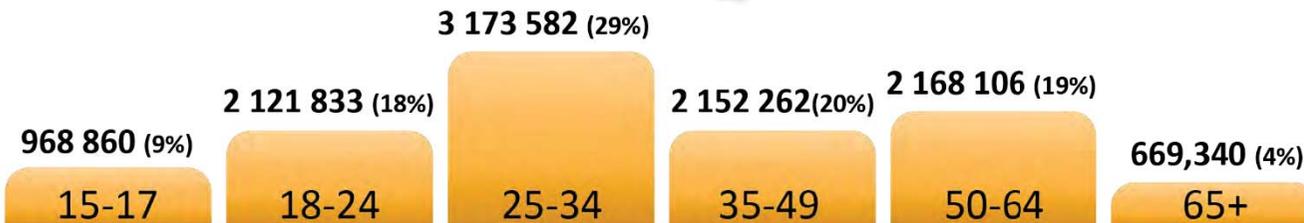
GENDER



Antagonists 4,1 million
Protagonists 7,2 million

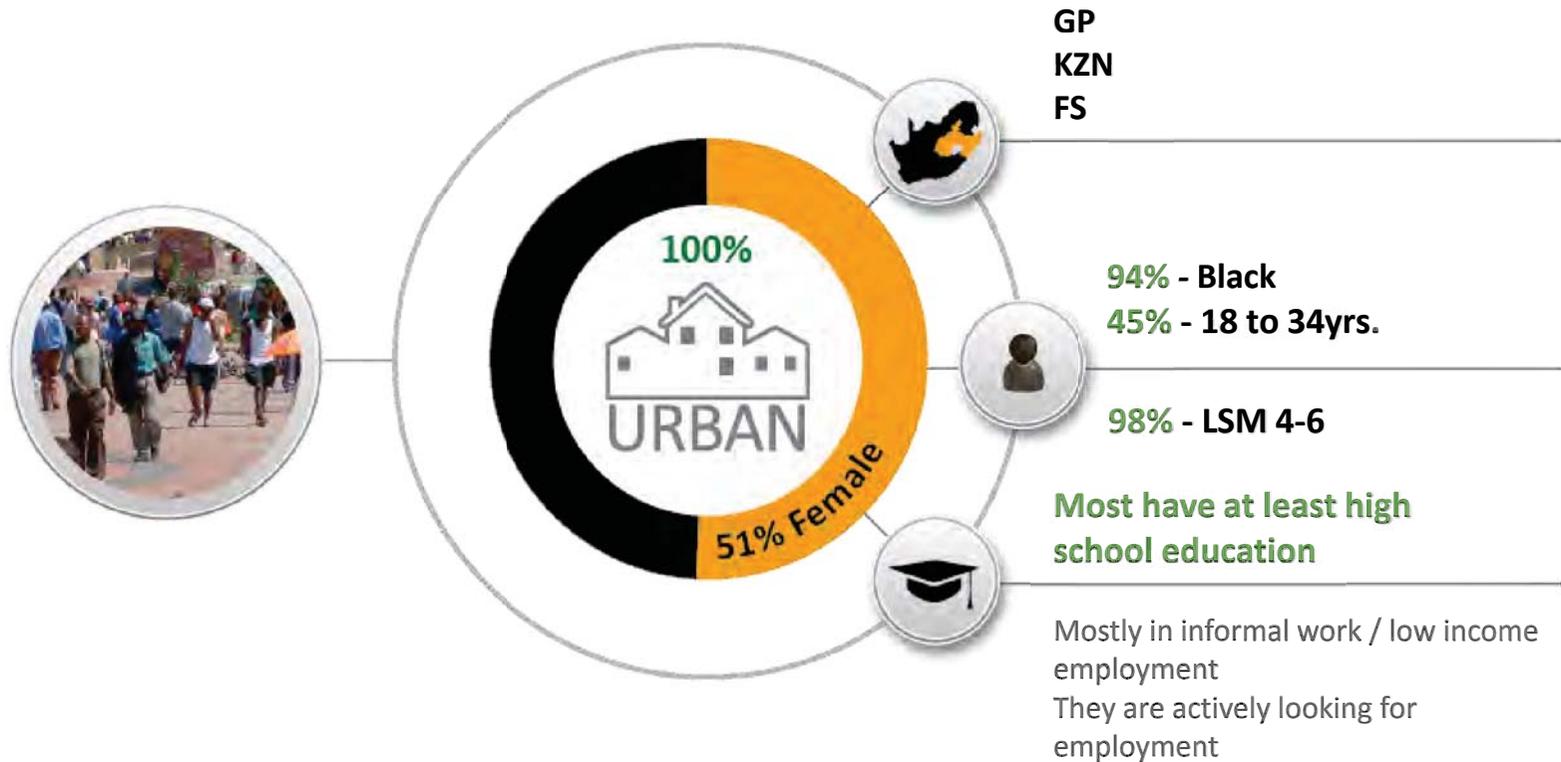


AGE





S2 – CITY SEEKERS: Prominent features





S2 – CITY SEEKERS: Profile

CITY SEEKERS



Urban and metro Africans, living in townships and informal settlements, predominantly in Gauteng, KZN and FS. Speak an African language. Equal proportion of males and females, three-quarters have secondary education but only one-in three are employed. Mostly under 50 years of age. Low media consumption, low involvement in community organisations and low interest in public affairs.

31%

Population

64%

PROTAGONIST

36%

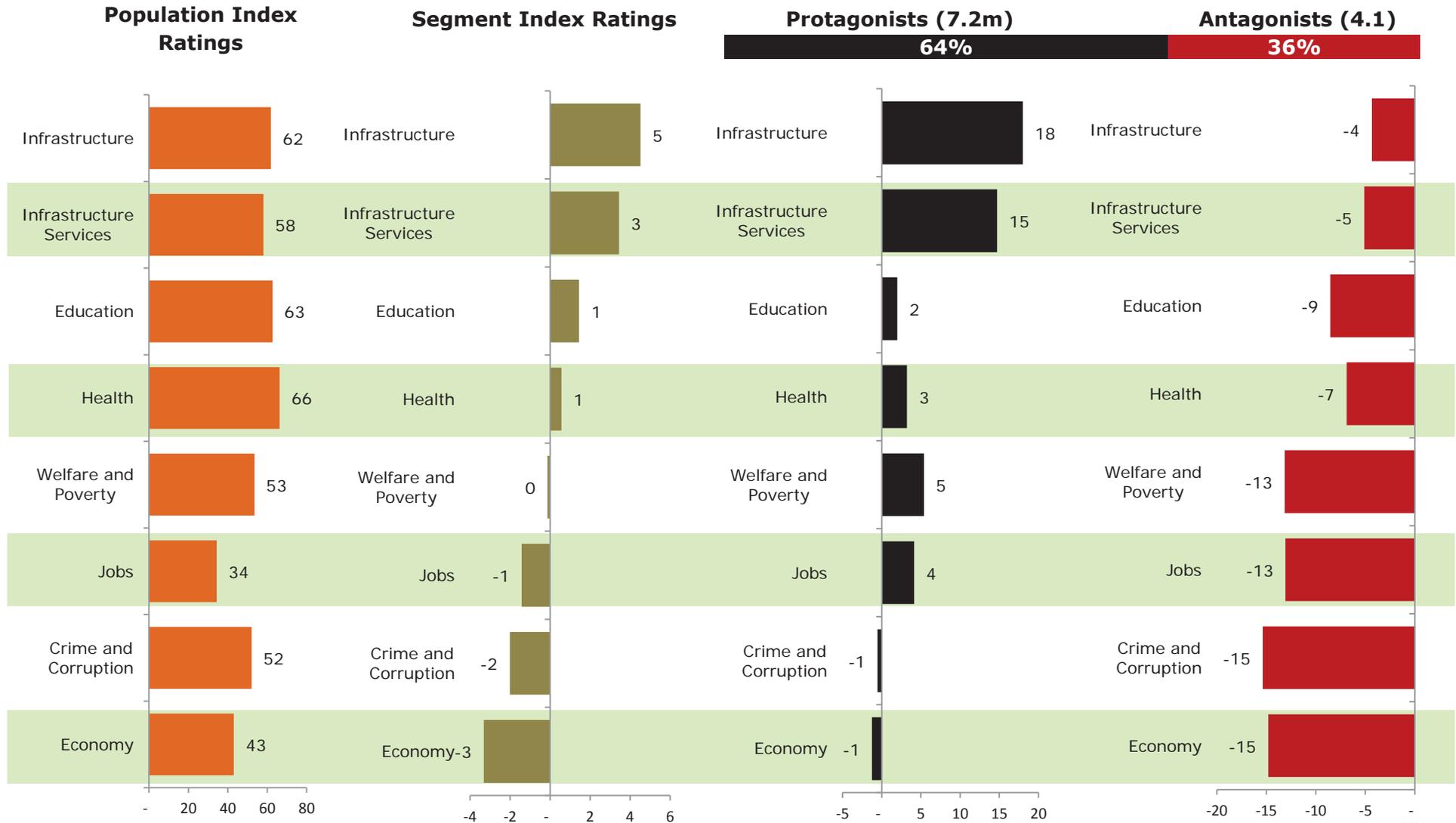
ANTAGONIST

- These are city people who are constantly seeking for better opportunities. They mostly migrated from rural areas for better opportunities in urban areas.
- They have career oriented goals and want to get ahead.
- While they **blame government/nepotism/corruption** for not being able to get ahead, they see few opportunities and **keep looking for work** as they see this as the answer to a better future.
- Most have high school education while a third have acquired their matric.
- They constantly want to **better themselves through education and improved skills** even in the face of major challenges.
- Some **see themselves as 'hustlers'**, creating opportunities where there are none. They **would do any job** due to the tough economic times.
- **Part time work** is also seen as great as it provides opportunities elsewhere for them to improve themselves, skills or academically.
- They do have a fear of not attaining their goals and not surviving financially – and not being able to improve their current situations.
- **Social grants are appreciated** as financial relief to assist with basic needs though not deemed sufficient.
- **Corruption was associated with officials misusing funds** – there is an acknowledgement though that **all were involved in partaking in corruption**-therefore becoming everyone's responsibility.
- They belong to **political/labour groups, however less active** in these groups.





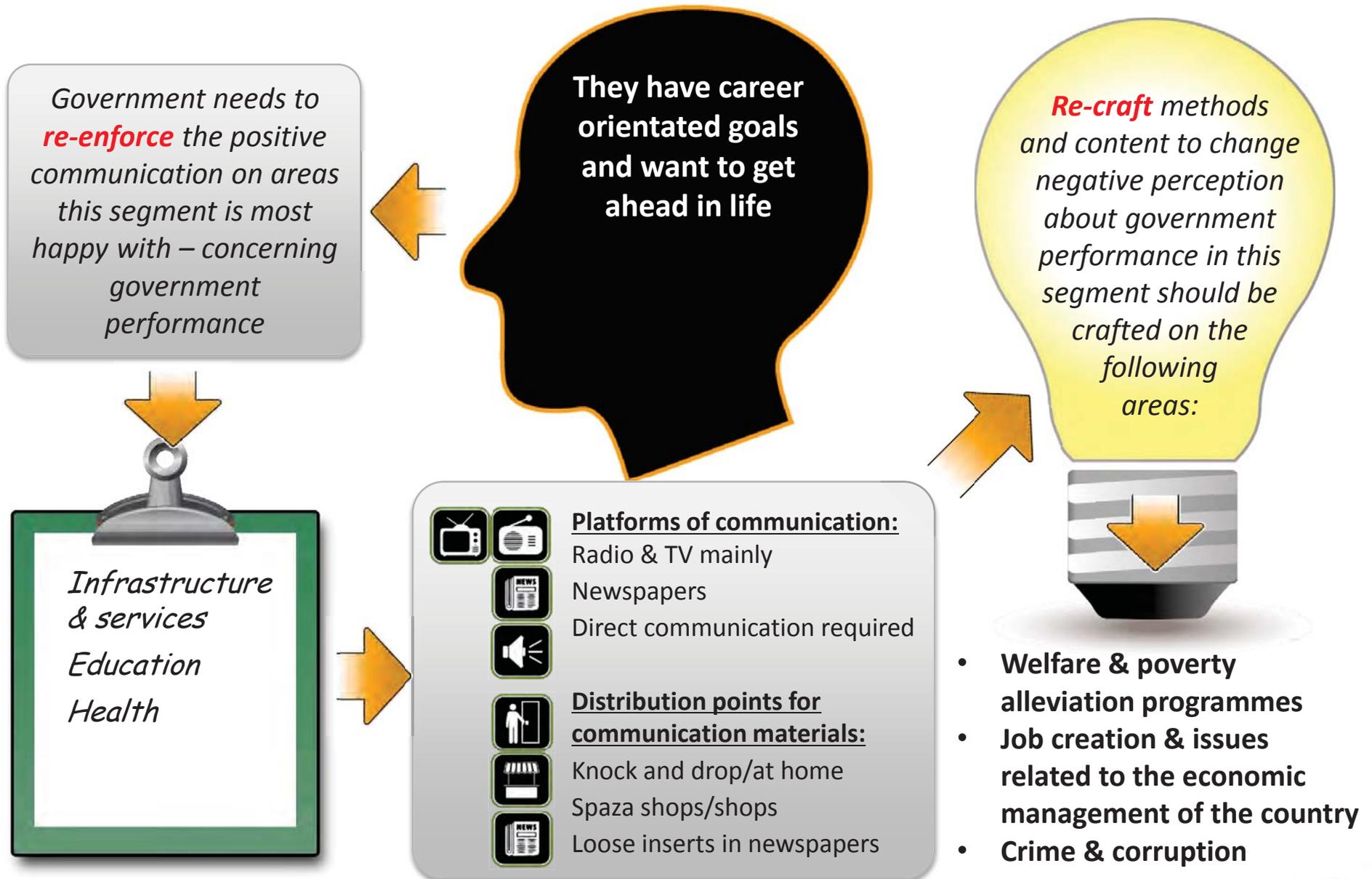
S2 – CITY SEEKERS



Note: the index measures denotes the deviation from the overall population mean



S2 – CITY SEEKERS: Communication implications

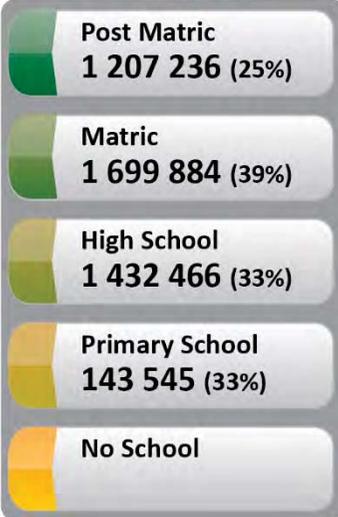




S3 – SAFELY SUBURBAN



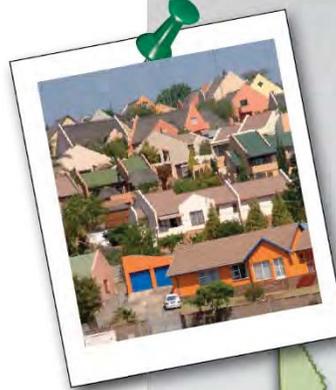
EDUCATION



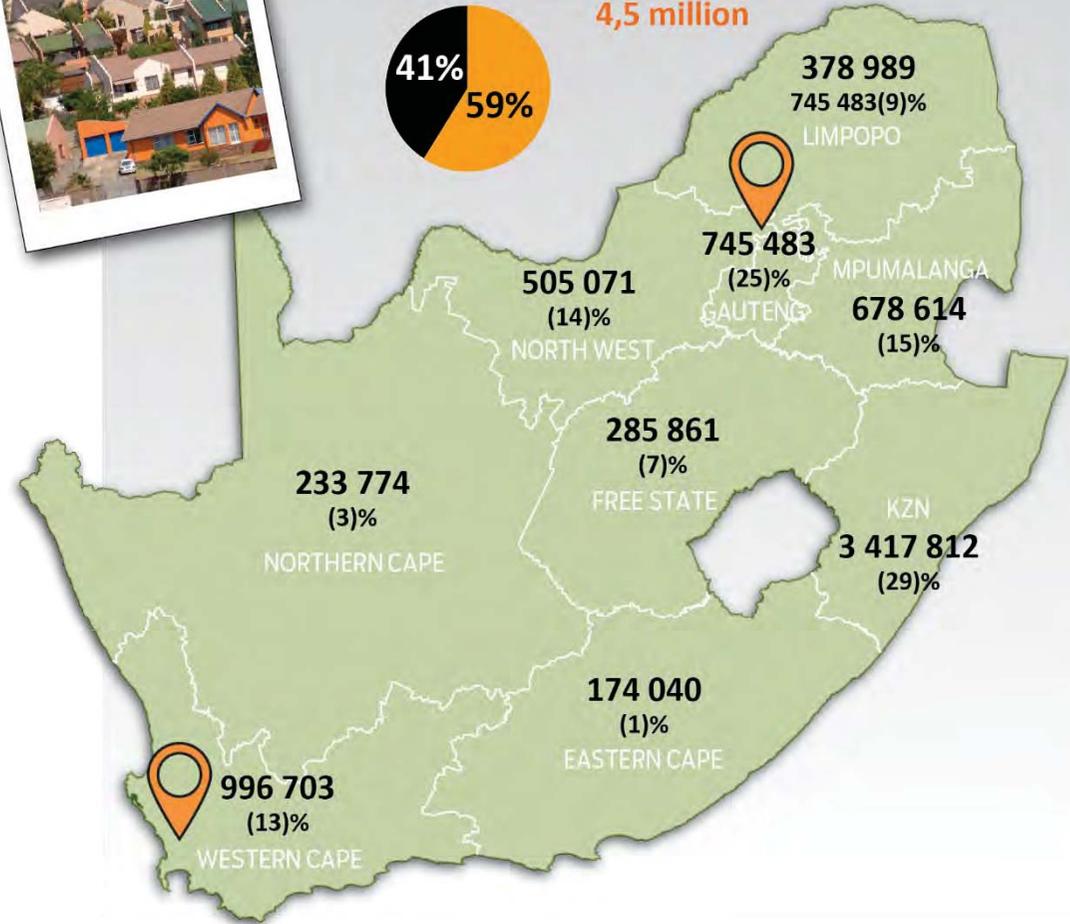
LSM



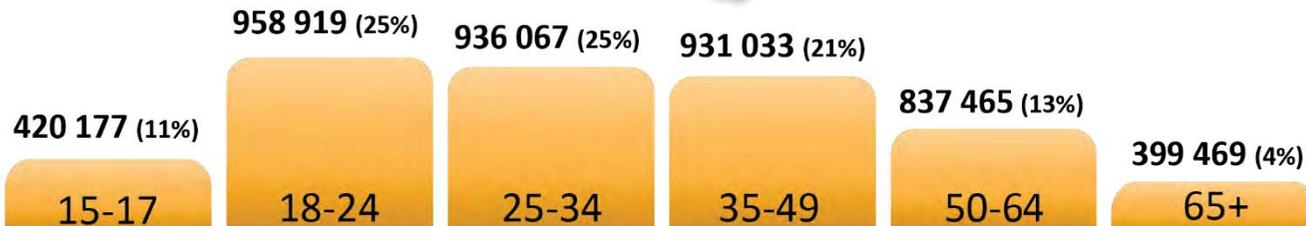
GENDER



Antagonists 1,9 million
Protagonists 2,6 million

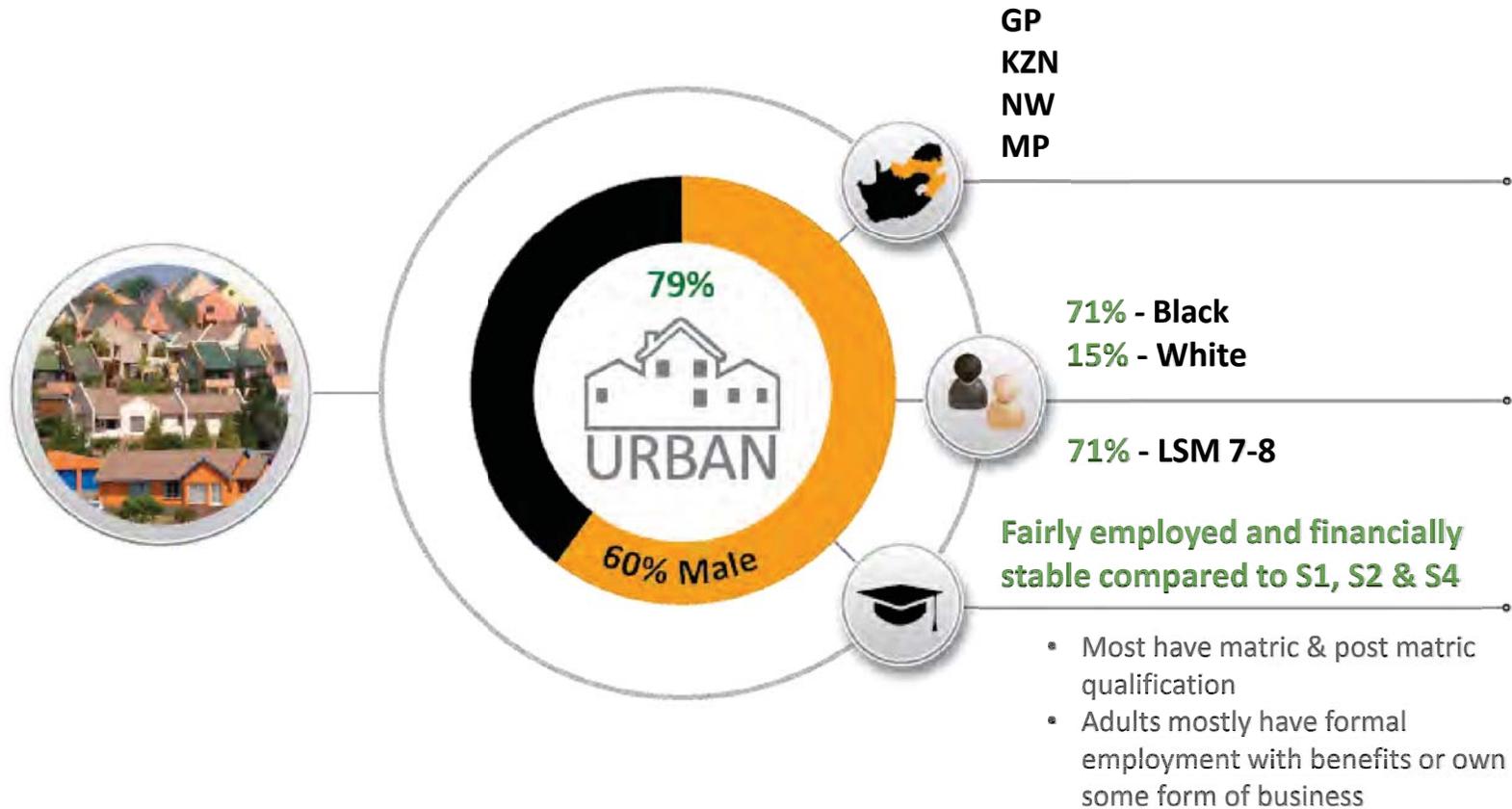


AGE





S3 – SAFELY SUBURBAN: Prominent features





S3 – SAFELY SUBURBAN: Profile

SAFELY SUBURBAN



Affluent, from the upper LSMs in large urban and small rural towns. Highest proportion of Afrikaans speakers. Male bias and tend to be younger, high levels of tertiary and furthering education with low unemployment. High media consumption and interest in public affairs.

12% Population

59%

PROTAGONIST

41%

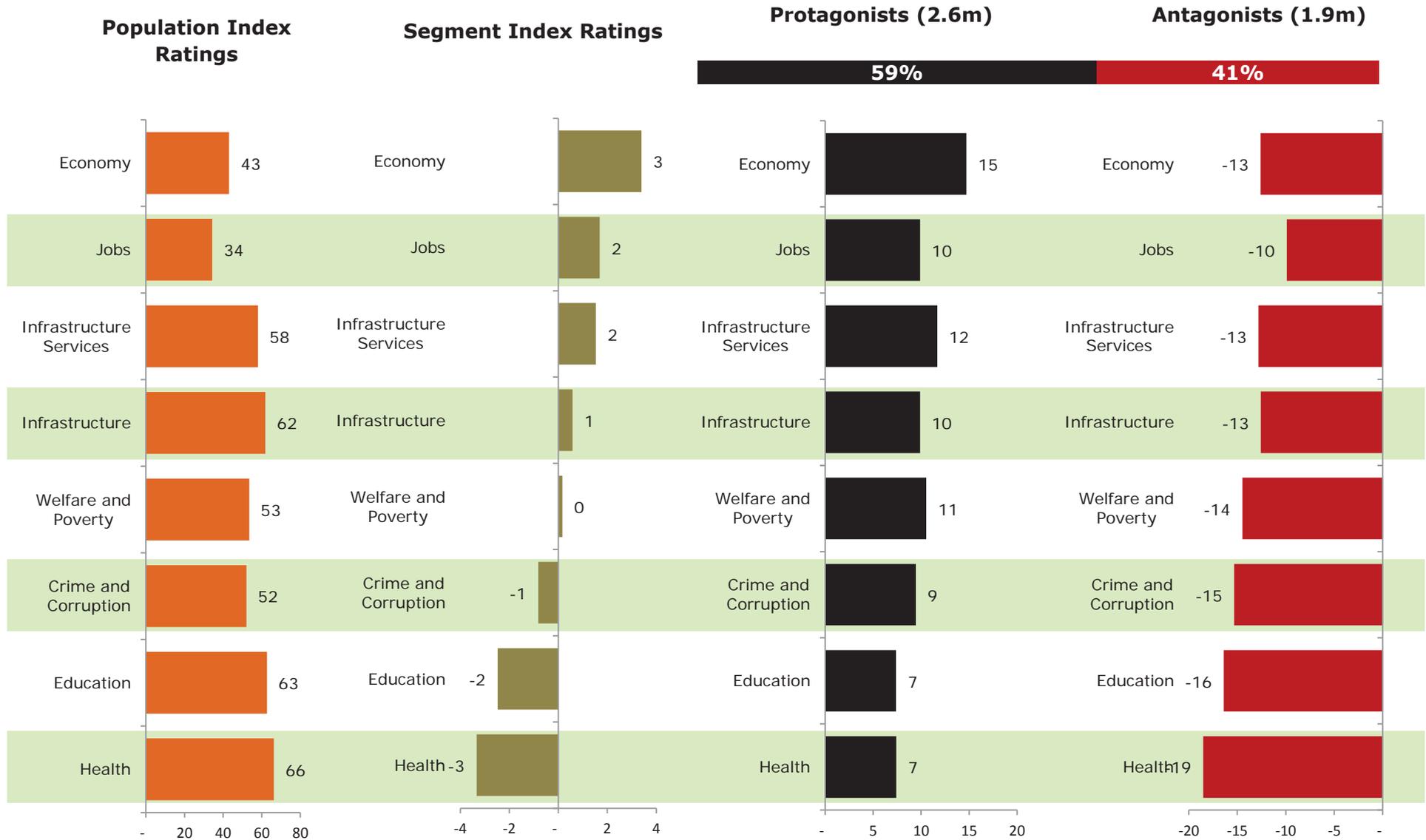
ANTAGONIST

- These people are **largely positive** about their own lives. They are most likely staying in sheltered “gated” or secured environments.
- The **economic recession** has had a huge impact on their lifestyle.
- Most of them have matric with some having a tertiary education, and there is a focus on furthering education (especially among the youth). They are **entrepreneurial** and focused on their financial security. They are **predominantly youth**
- While **unemployment is low**, this segment **want better jobs** and are **selective about the type of jobs** they are prepared to do – it is about the quality of employment opportunity. They are also somewhat dependant on their parents when things fall short.
- They feel very **affected by the high cost of living**, ever increasing petrol prices, influx of foreigners, drug peddling, lack of job opportunities for local South Africans.
- They worry about **racial inequality in education**, and that immigrants are taking jobs from locals. They see an imbalance in the allocation of resources for skills development also detrimental to the growth of the economy.
- They are **ambivalent about social grants** – in the one sense it is seen as potential reason for future unchecked population growth on the other necessary to assist needy families during these tough economic times.
- They **associate corruption with government** (top of mind), but when **probed they acknowledge their own contribution to corruption**.
- They belong to **political parties and trade unions though** most of them are **inactive**.





S3 – SAFELY SUBURBAN

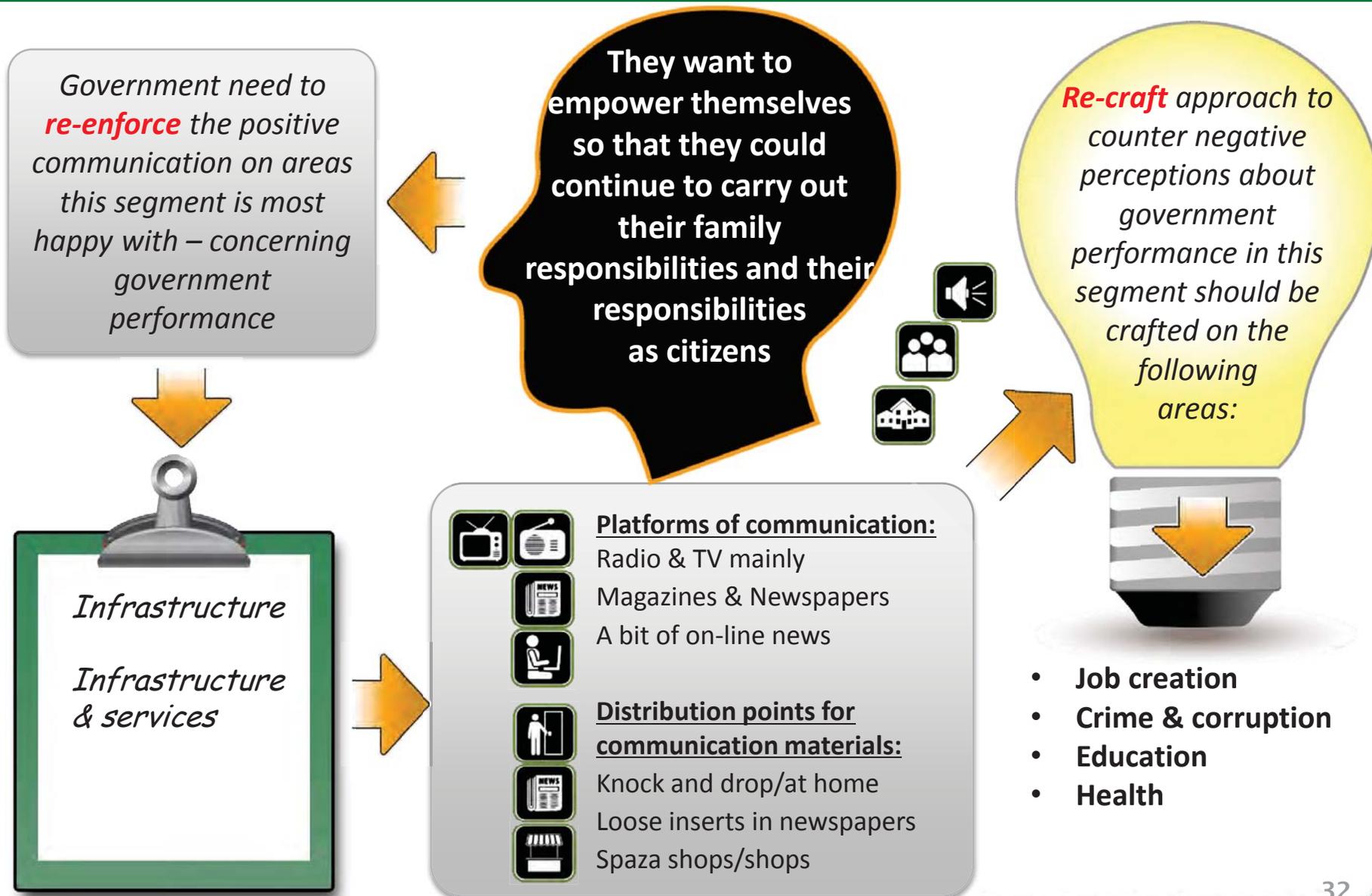


Note: the index measures denotes the deviation from the overall population mean





S3 – SAFELY SUBURBAN: Communication implications

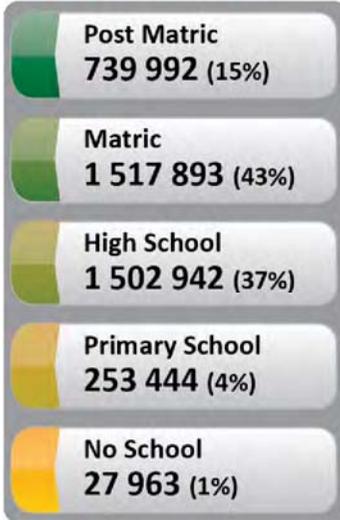




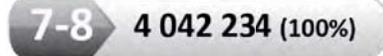
S4 – METRO MOBILES



EDUCATION



LSM

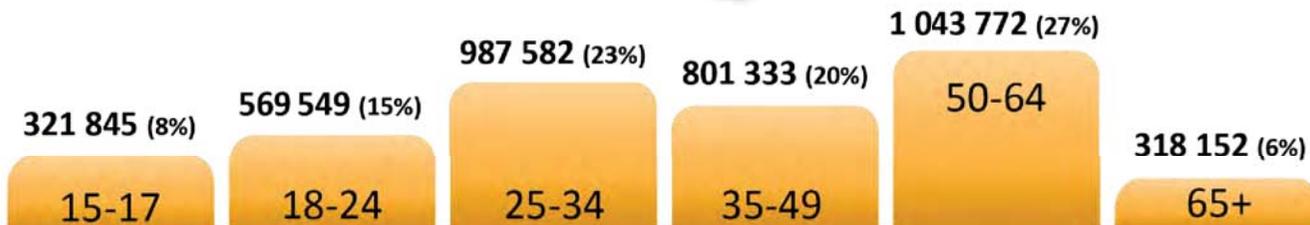


GENDER

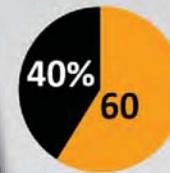


4 042 234 (100%)

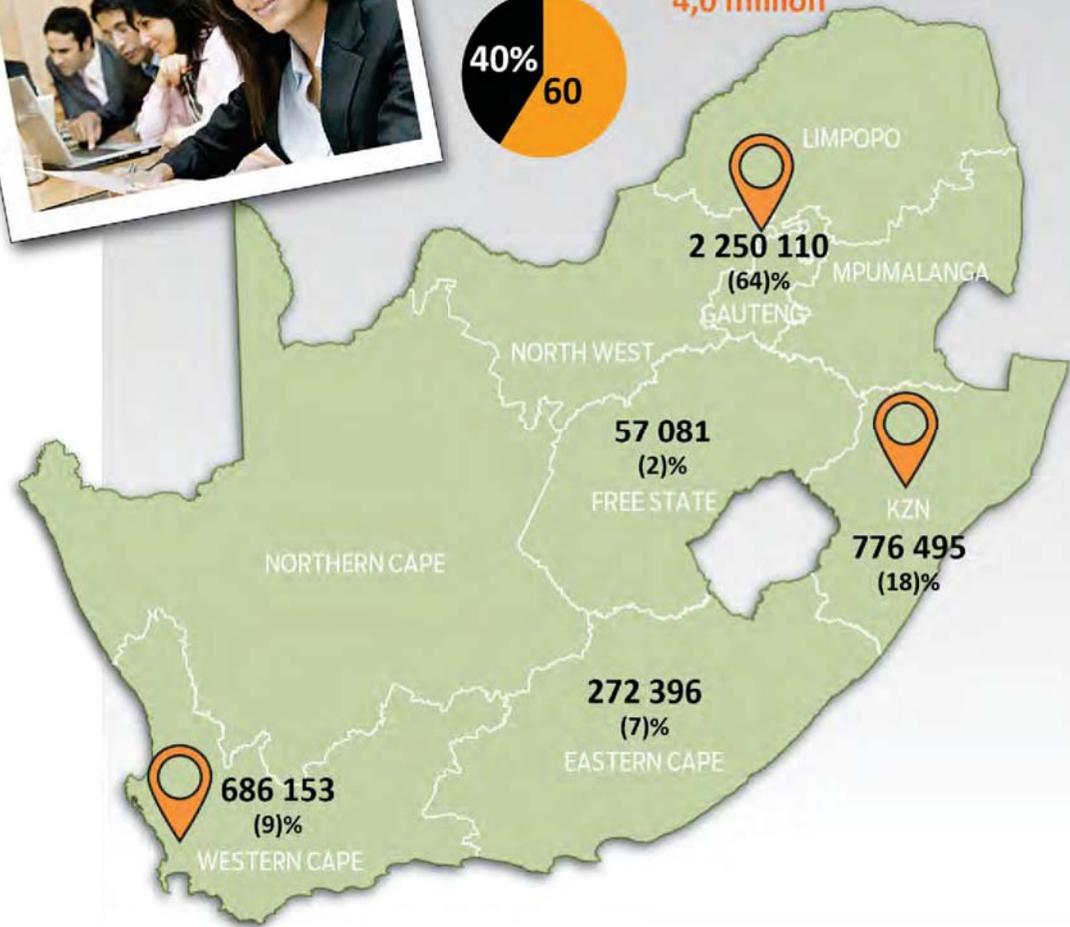
AGE



Antagonists 1,6 million
Protagonists 2,4 million

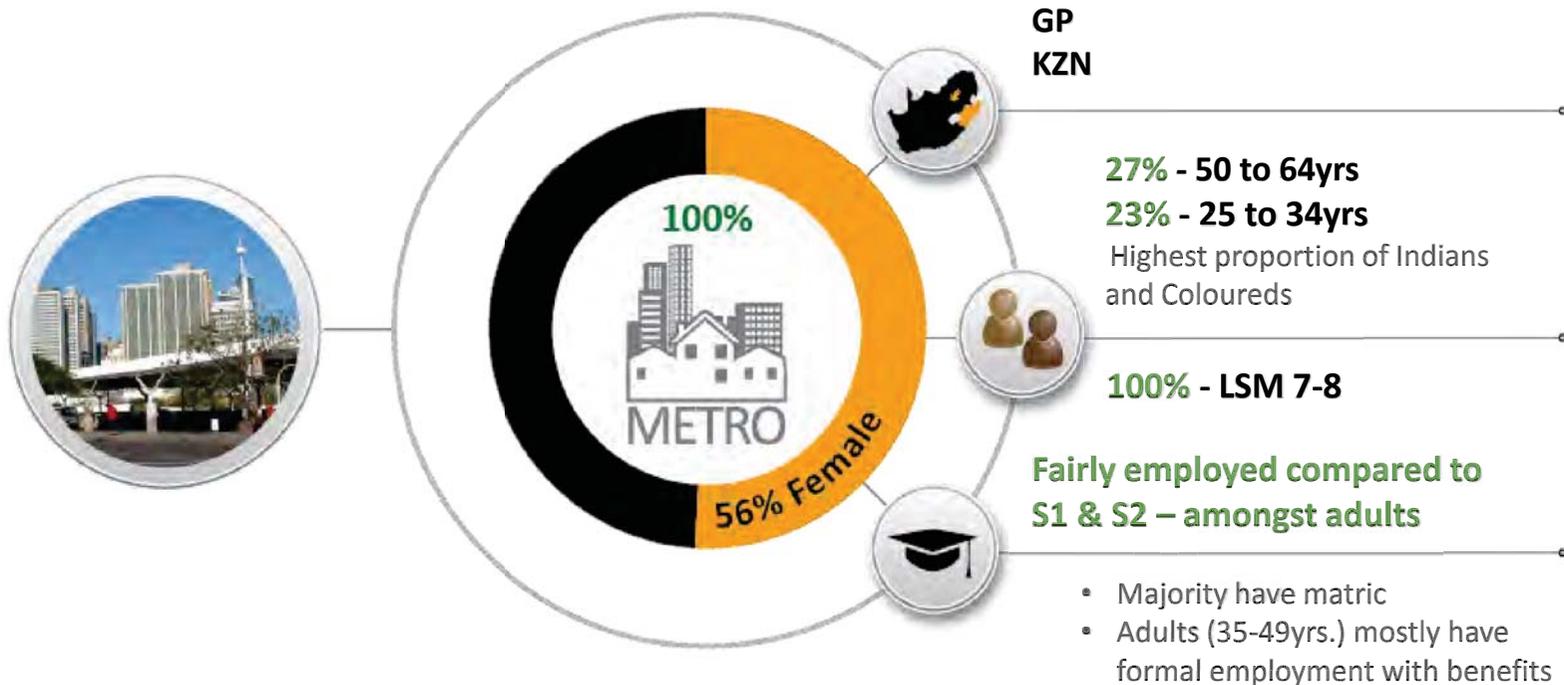


4,0 million





S4 – METRO MOBILES: Prominent features





S4 – METRO MOBILES: Profile

METRO MOBILES



Middle class citizens from LSM 7-8 in main metro areas. Speak Zulu, English, Afrikaans and Xhosa. Slight female bias.

Mainly have secondary education.

Primarily focused on improving, empowering and securing themselves.

Although media consumption is fairly

high, interest in public affairs and involvement in group or community activity is low.

11%

Population

60%

PROTAGONIST

40%

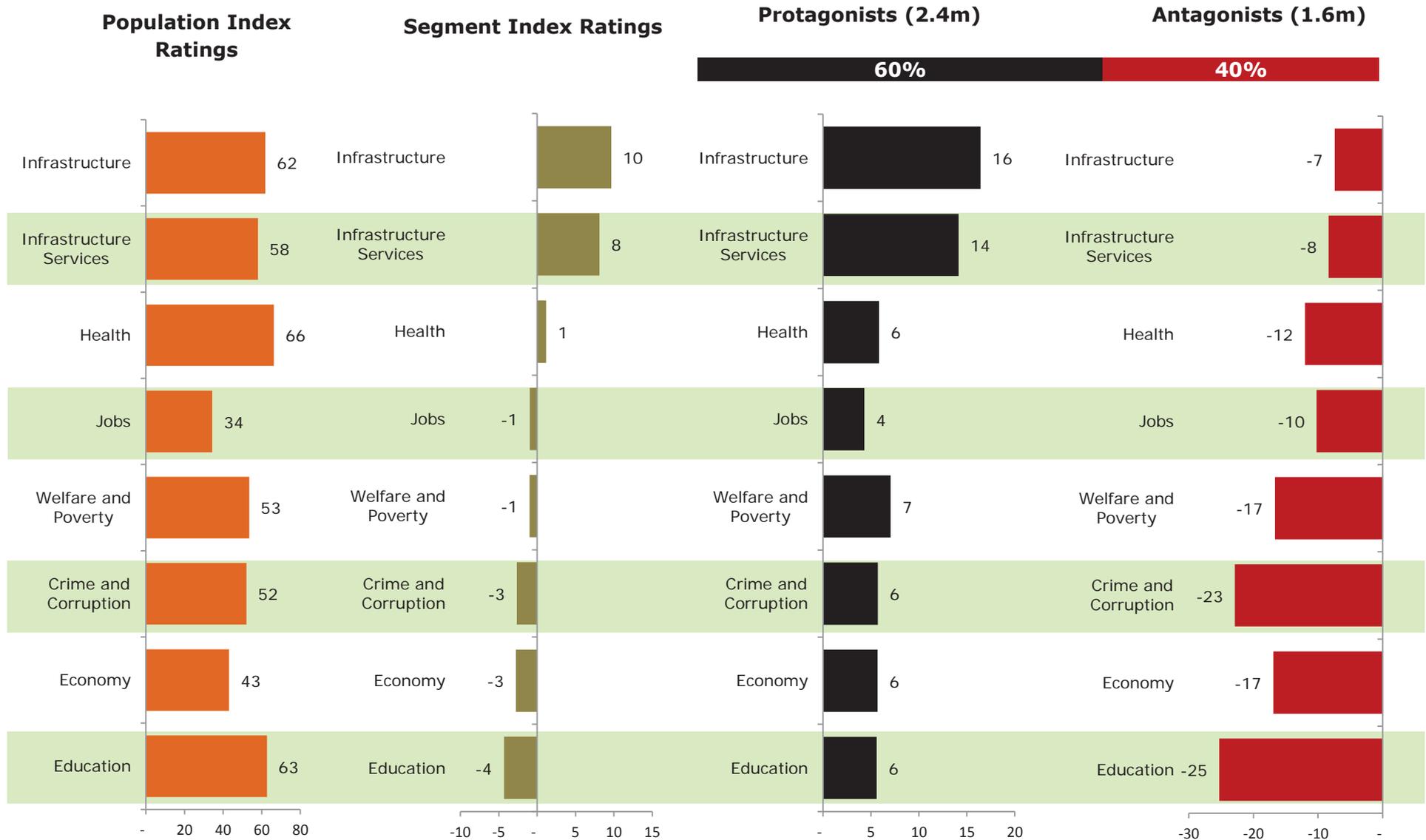
ANTAGONIST

- The people in this segment are **generally interested in maintaining a particular lifestyle**. They are worried about a drop in their lifestyles given the **high cost of living**.
- They are worried that they cannot keep up with **financial demands**. Some live with their parents because of the cost of living.
- They see **foreign investment** as the way forward and a way to create jobs, although they are **extremely threatened, critical and worried, about 'foreigners' in the country**.
- They have **career oriented goals** and are prepared to work hard to further their situation and **seeking better employment**.
- They are **worried** about drugs, **high levels of unemployment, lack of foreign investment, corruption, nepotism** (especially in the work place), **bribery, basic service delivery, crime and safety** and the impact of foreigners taking their opportunities.
- They are **concerned about their children's future** and in some instances even prepared to leave the country to secure a better lifestyle.





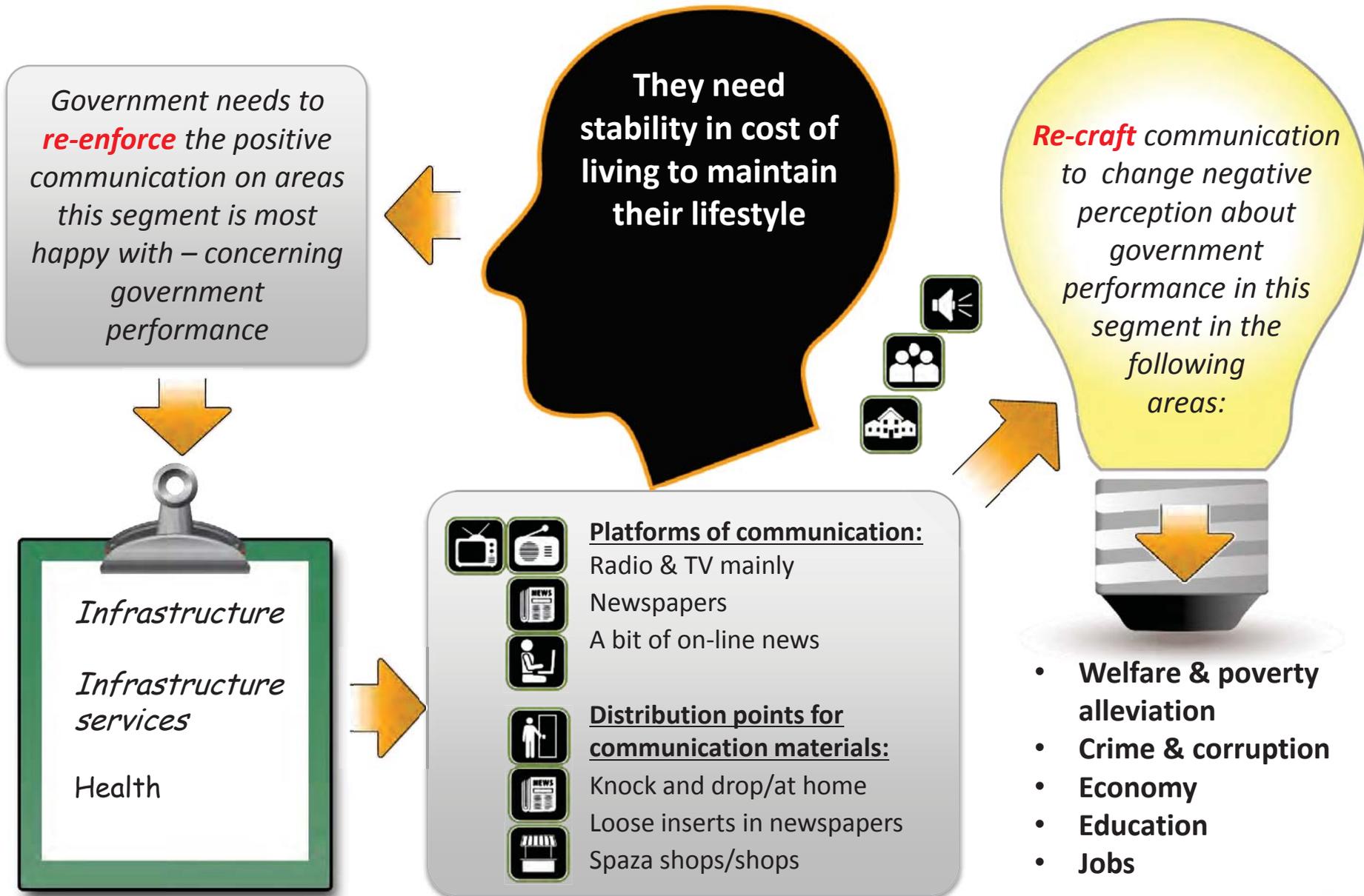
S4 – METRO MOBILES



Note: the index measures denotes the deviation from the overall population mean



S4 – METRO MOBILES





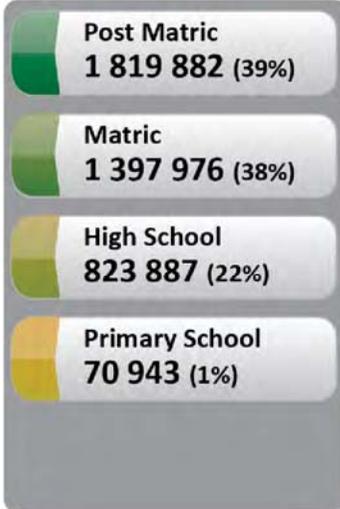
S5 – COSMOPOLITAN CAPITAL



Antagonists 2,1 million
Protagonists 2,0 million



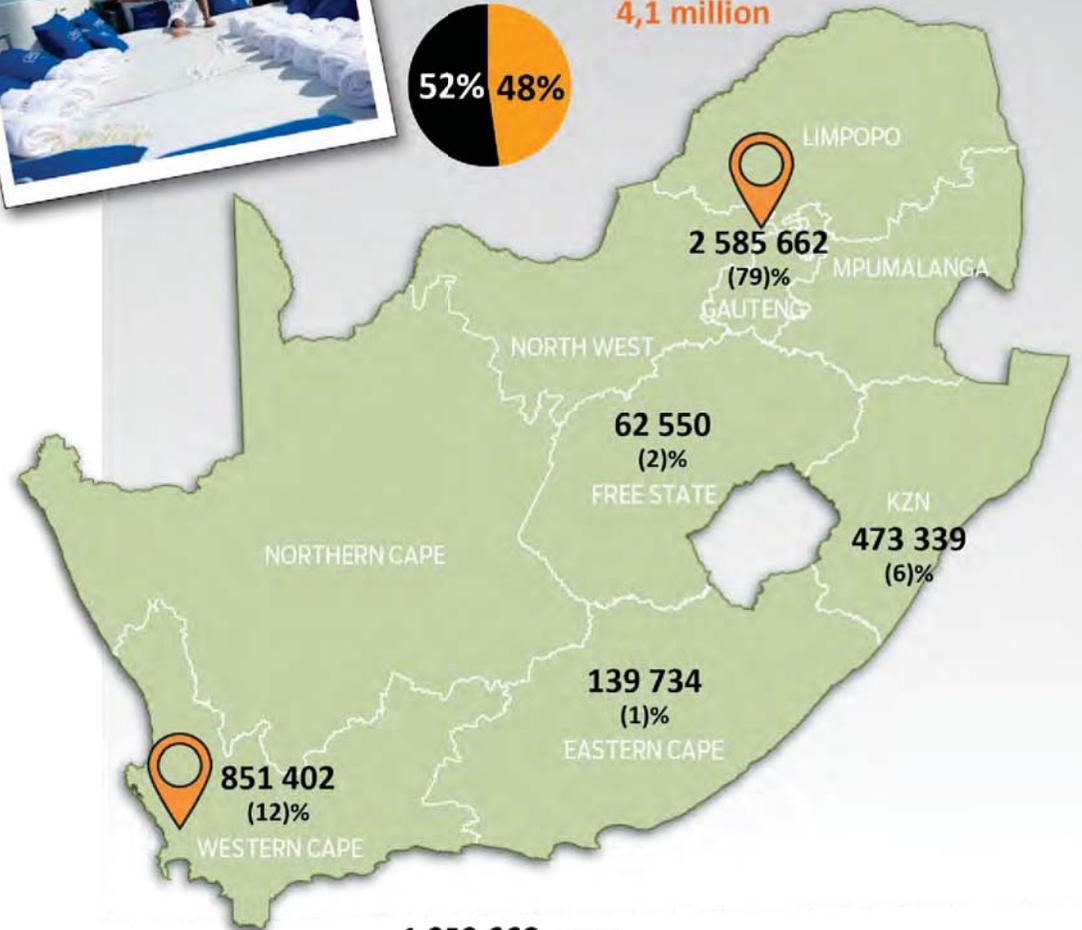
EDUCATION



LSM

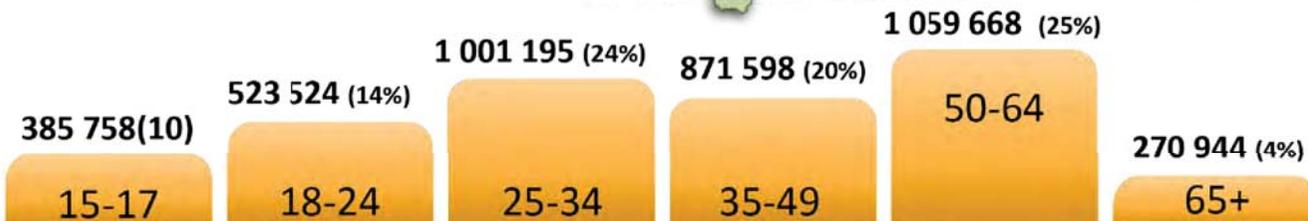


GENDER



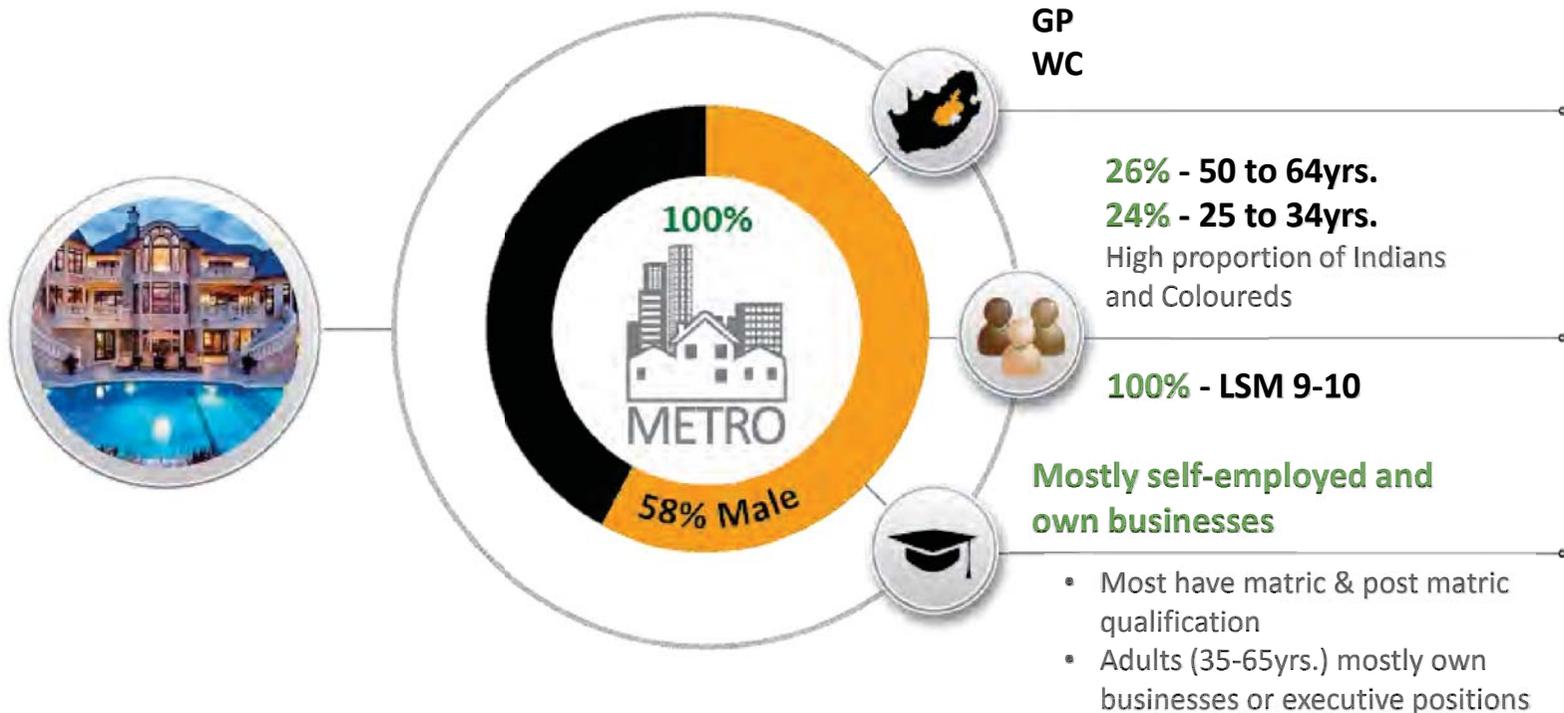
4 112 687 (100%)

AGE





S5 – COSMOPOLITAN CAPITAL: Prominent features





S5 – COSMOPOLITAN CAPITAL: Profile

COSMOPOLITAN CAPITAL



Most affluent, live in city, highest disposable income, highest proportions of tertiary education, employment and self employment. Bias to white, English and Afrikaans speakers. Male bias. Highest media consumption and awareness of public affairs but most critical of government.

11%

Population

48%

52%

PROTAGONIST

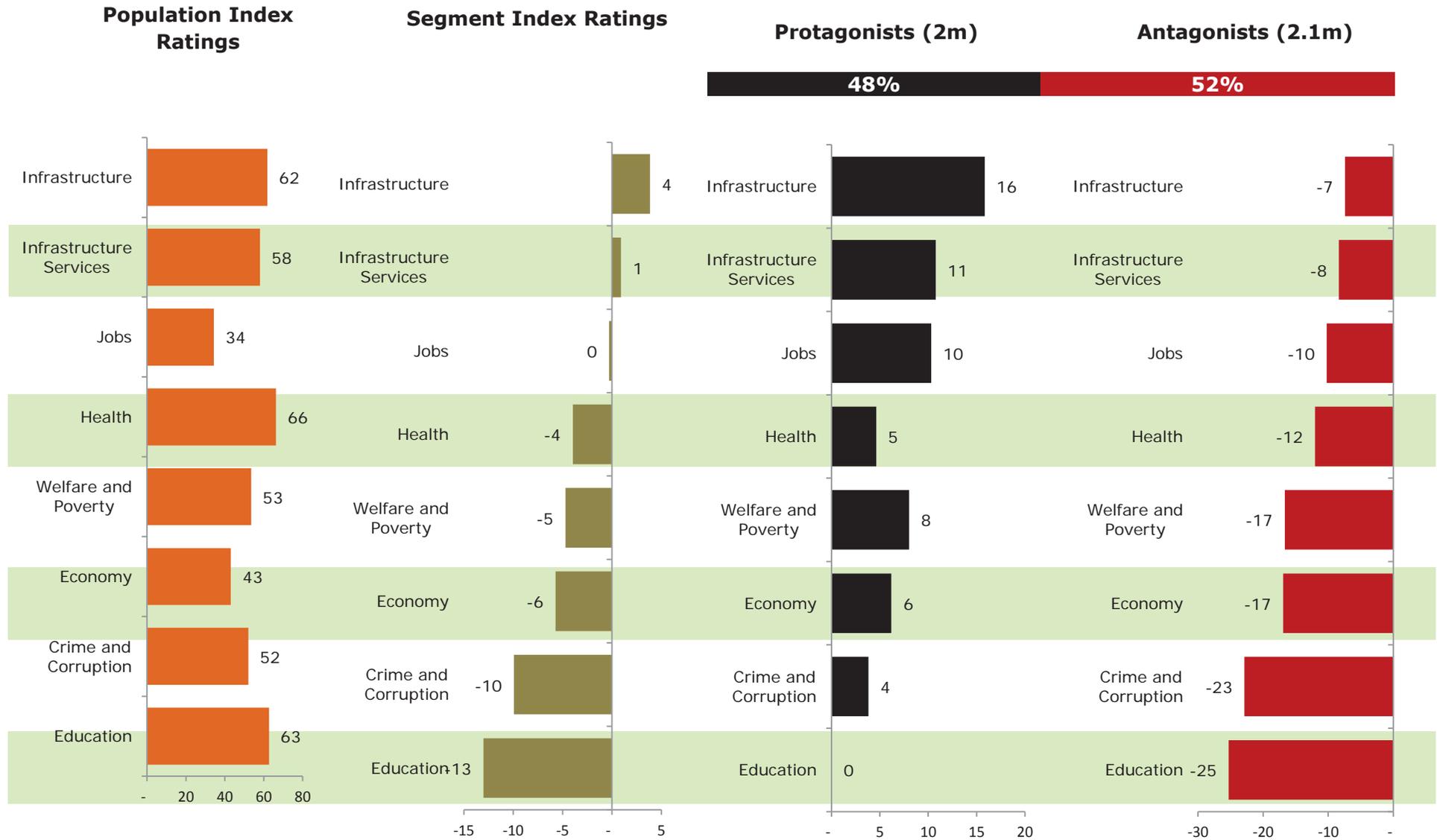
ANTAGONIST

- They are the segment of the market that is **extremely conscious of South Africa in a world-wide arena**; through access to knowledge and information and they have the **financial lifestyle to experience and compare**.
- They are the **most affluent** segment of the population, with the highest amount of disposable income, **highest proportions** of tertiary education, **employment and self-employment**.
- **Lack of job opportunities concern them**. Their **future plans** mainly hinge around **business** and are focused on **uplifting themselves academically**.
- They always making plans as “they go” due to the perceived political and economic instability in the country.
- **Emigration is a strong consideration for this segment** – due to the expressed possibility of better living conditions elsewhere. They are also **concerned about land grabs and governments policy on land distribution**.
- Issues for them are **education** (they send their children overseas for schooling and university), **crime and corruption** and management of the economy.
- They **associate corruption mainly with Government officials** and **condemn BEE** which they see as cause of corruption. E Toll is also perceived by this segment as a form of corruption.





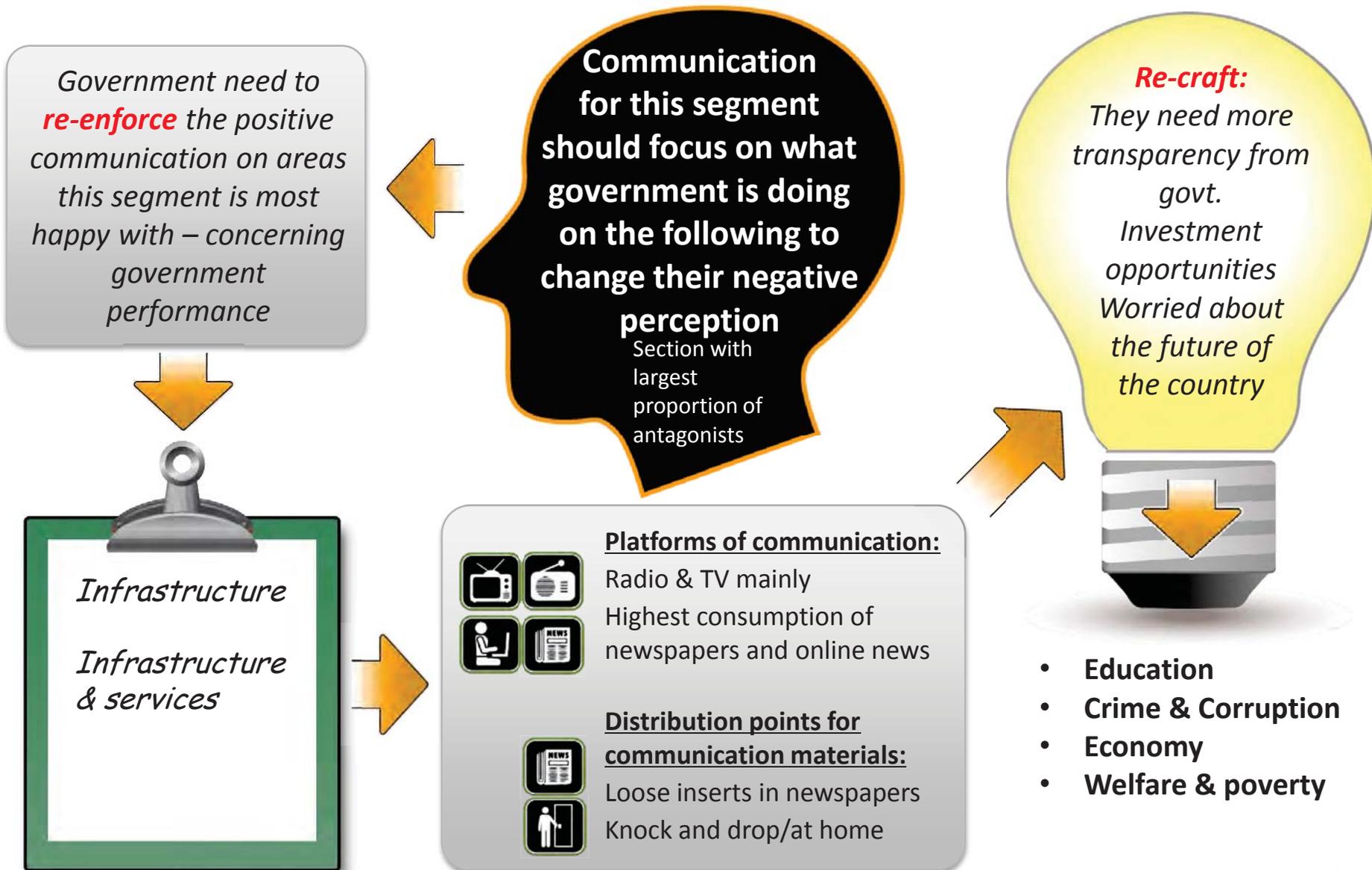
S5 – COSMOPOLITAN CAPITAL



Note: the index measures denotes the deviation from the overall population mean



S5 – COSMOPOLITAN CAPITAL: Communication implications



RECOMMENDATIONS TOWARDS EFFECTIVE USE OF SEGMENTATION

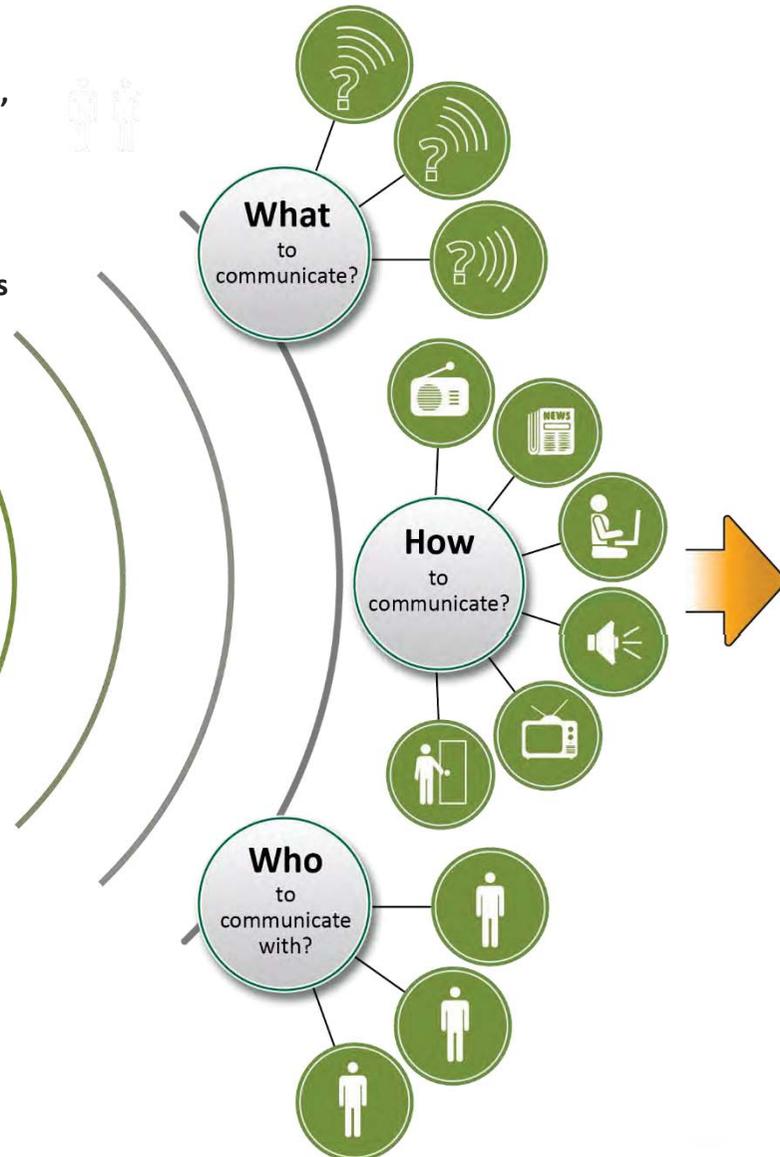
- **Tailoring** is the process of crafting messages to cater for individual characteristics. The audiences must perceive that the issue is relevant to them. Relevance of the message is the extent to which it fulfils the desires and motivations of individuals.
- What we have provided today is the tailored messages that each identified segment needs and wants to hear. There are priority messages and secondary messages for each group.
- Communicators need to **note** which **communication channels** are likely to be the **most effective** in reaching the intended audience. This process is called **targeting**, it is the strategic use of communication channels to reach the audience segments.



RECOMMENDATIONS TOWARDS EFFECTIVE USE OF SEGMENTATION cont.

By understanding people and their differences, in terms of services government delivers, we know better what to say to them and how to say it to them so that we can create greater understanding of what government does and is doing for all South Africans

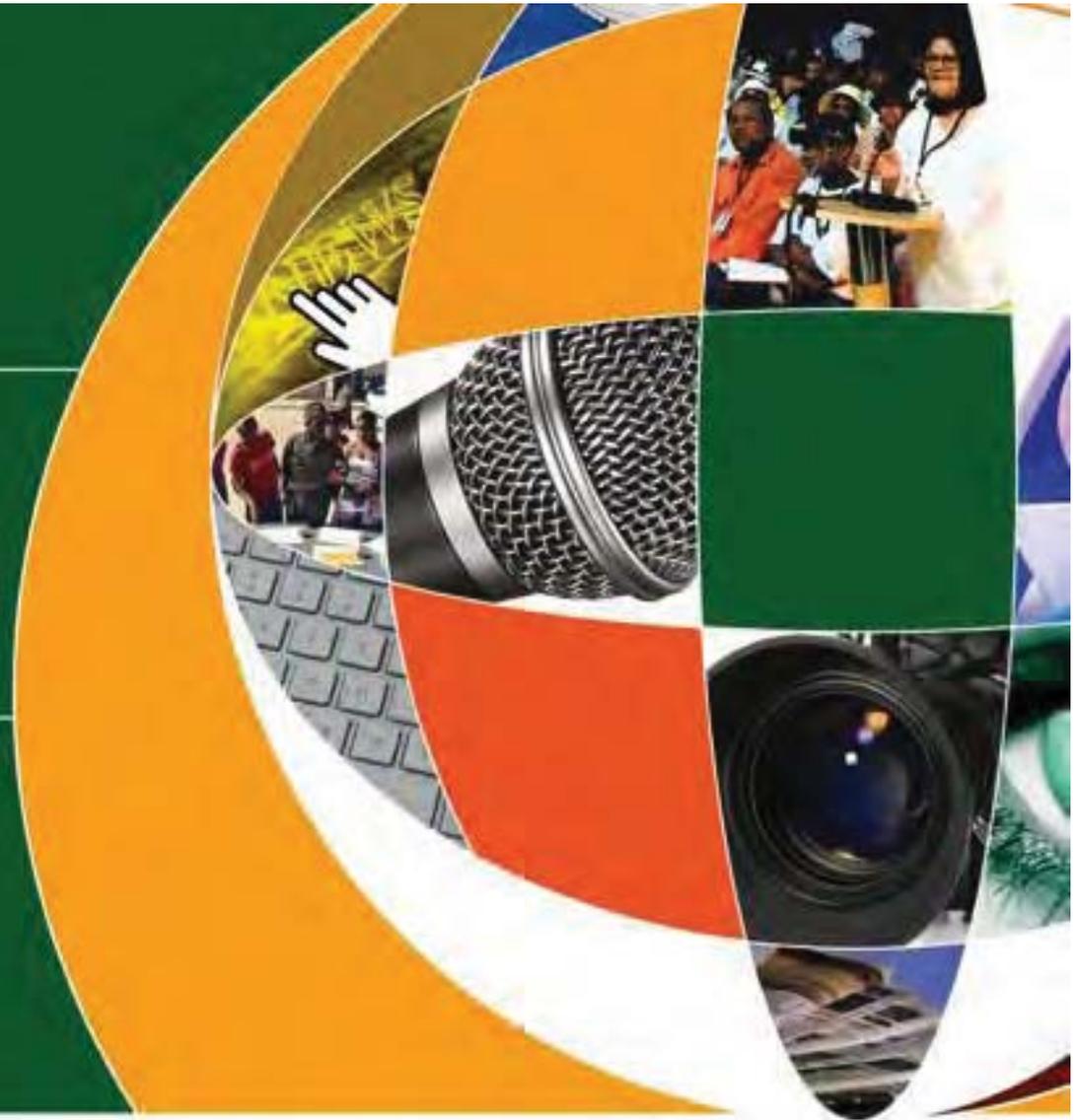
GCIS wants to formulate effective communication strategies in terms of.....



To do so, Government needs to understand:

- What are the needs of different groups within the South African population?
- What are the issues facing these groups?
- How do typical South Africans perceive communication from government and how receptive will they be?
- How should GCIS and the whole of govt. communicate with them (e.g. topics, channels etc.)

THANK YOU



government
communications

Department:
Government Communication and Information System
REPUBLIC OF SOUTH AFRICA