THE
IDENTIFICATION
OF A MULTI-ETHNIC
SOUTH AFRICAN TYPOLOGY

By

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DECLARATION

I declare that this is my unaided work and has not been submitted to another university for any degree.

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Clive Kingsmill Corder   Date

SUMMARY

THE
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BY

CLIVE KINGSMILL CORDER

PROMOTERS : **PROF. G PUTH AND PROF. J B SCHOEMAN**

DEPARTMENT : **PSYCHOLOGY**

DEGREE : **DOCTOR PHILOSOPHIAE**

The aim of this study was to discover whether a value-based typology could be established that was applicable to all South African adults.

It was predicated on the basis of a literature review and previous research findings that there were two major underlying dimensions of values: collectivism versus individualism and inner- versus outer-directed. The parameters of these dimensions were hypothesised within the framework of a common social structure, based on a number of related propositions. It was also hypothesised that the South African adult population consisted of five types.

Five value measures were examined and found to have disadvantages for South Africa. A value measurement technique had been developed in South Africa for an on-going study titled Sociomonitor. The core of this study was the measurement of values of relevance to marketing and media. Over the period 1976 to 1993 separate value based typologies were identified for urban Blacks and Whites. In 1995 both races were covered in the same year and a common typology was found.

In 1997/8 Sociomonitor was extended to the total adult population of South Africa. Respondents

were sub-divided into Collectivism, Individualism, Inner- and Outer-directed groups. The characteristics of which were found to be substantially as had been expected.

South African adults were categorised into five value types. Three of which were as had been hypothesised, two were in place of one of the five anticipated and one wasn't found.

It is concluded that the values of adults from all ethnic groups fall within the parameters of collectivism versus individualism and inner- versus outer-directed. Furthermore, there are five different value types in the South African adult population that transcend ethnic boundaries.

The implications of a multi-ethnic typology for marketing, social and political decision-making, research and the formulation of scenarios are outlined.

It is recommended that this type of research be extended to other African countries and small communities.

Key words: African Humanism, Black Consciousness, collectivism, individualism, inner-directed, Négritude, outer-directed, multi-ethnic, segmentation, trends, typology, Ubuntu, values.

OPSOMMING

DIE
IDENTIFIKASIE
VAN 'N MULTI-ETNIESE
SUID-AFRIKAANSE TIPOLOGIE

DEUR

CLIVE KINGSMILL CORDER

STUDIE-LEIERS **:** **PROF. G PUTH EN PROF. J B SCHOEMAN**

DEPARTEMENT **:** **SIELKUNDE**

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Die oogmerk van hierdie studie was om vas te stel of 'n waarde-gebaseerde tipologie daargestel kan word wat toepaslik is op alle Suid-Afrikaanse volwassenes.

Op die basis van 'n literatuur-beskouing en vorige navorsingsbevindings is bepaal dat daar twee belangrike onderliggende waarde-dimensies is: kollektivisme versus individualisme en innerlik- versus uiterlik-gerigtheid. Die parameters van hierdie dimensies berus op 'n hipotese binne die raamwerk van 'n algemene sosiale struktuur, gebaseer op 'n aantal stellinge wat daarmee verband hou. 'n Verdere hipotese is dat die Suid-Afrikaanse volwasse bevolking uit vyf tipes bestaan.

Vyf waardebepalings is ondersoek en daar is bevind dat dit nadele vir Suid-Afrika inhou. 'n Waardebepalings-tegniek is in Suid-Afrika ontwikkel vir 'n aaneenlopende studie getiteld Sociomonitor. Die kern van hierdie studie is die bepaling van waardes wat relevant is vir bemarking en media gebruik. Oor die tydperk 1976 tot 1993, is afsonderlike waarde-gebaseerde tipologie vir stedelike swartes en blankes geidentifiseer. In 1995 is beide rasse in dieselfde jaar gedek en 'n gemeenskaplike tipologie is ontwikkel.

In 1997/8 is Sociomonitor uitgebrei tot die totale volwasse bevolking van Suid-Afrika.

Respondente is onderverdeel in collektivisme, individualisme, innerlik-en uiterlik-gerigte groepe. Soos verwag is, is die eienskappe wat gevind is, substansieël.

Suid-Afrikaanse volwassenes is in vyf waarde-tipes ingedeel. Drie daarvan was volgens hipotese, in plaas van een van die vyf volgens verwagting, was daar twee en vir een was daar geen bevinding nie.

Daar word tot die gevolgtrekking gekom dat die waardes van volwassenes van alle etniese groepe, binne die parameters val van kollektivisme versus individualisme en innerlik-versus uiterlik-gerigtheid. Verder is daar vyf verskillende waarde-tipes binne die Suid-Afrikaanse volwasse bevolking wat etniese grense oorskrei.

Die implikasies van 'n multi-etniese tipologie vir bemarking, sosio-en politieke besluitneming, navorsing en die formulering van scenario's, word uiteengesit.

Dit word aanbeveel dat hierdie tipe navorsing uitgebrei word na ander Afrika lande en klein gemeenskappe.

Sleutelwoorde: Afrika-humanisme, Swart bewussyn, kollektivisme, individualisme, innerlik-gerig, "Negritude" uiterlik-gerig, multi-etnies, segmentasie, neigings, tipologie, Ubuntu, waardes.

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CHAPTER 1

INTRODUCTION

1.1   SOCIAL AND POLITICAL CONTEXT

In the context of the rapid social and political changes taking place in South Africa, it is considered imperative to find out whether there are common values between people of different ethnic origins.

The approach of the past, which focused on emphasising differences between racial groups, and led to extensive dissent, has been replaced with a new dispensation. President Nelson Mandela in his opening address to a Joint Sitting of Parliament, 24 May 1994, captured the spirit of the era (Government of National Unity, 1994):

> *My Government's commitment to create a people-centred society of liberty binds us to the pursuit of the goals of freedom from want, freedom from hunger, freedom from deprivation, freedom from ignorance, freedom from suppression and freedom from fear. These freedoms are fundamental to the guarantee of human dignity. (p. 1)*

South Africa's problem was expressed by Mandela's successor President Thabo Mbeki in an address to the Afrikanerbond (Mbeki, 1999):

> *We are faced with the challenge: whether it is better to proceed on different roads, each alone, that become increasingly narrow as we travel, or whether it is possible to build one road through which we can all travel forward faster together. (p.1)*

Moller (1992) has noted that 'in the non-racial democratic society, to which South Africans aspire, there will need to be some mutualities to bind together the diverse cultural groups which make up society. A set of common values may be essential for making democracy work in a plural society' (p. 105). Omotoso (1994), in consideration of an ideal for Nigeria, hoped that:

> *Each ethnic nationality would bring from their abundance a contribution to the national pool; each would retain something of its own identity, while at the same time sharing in the common culture to which all of them had contributed. There would be no group without something unique in itself, though all would share a common set of interests, and even an overall identity. (p. 4)*

The need to focus on similarities to develop a shared identity has also been advocated by Mbigi (1997).

Alexander, in an interview with Moore (1994), opined that the Eurocentric concept of culture had been used in the past to divide South Africans, but that despite differences there are shared values, which can be a unifying national driving force. It can be argued that the long-term development of the country will be placed in jeopardy, if such similarities can not be identified and used to foster co-operation, rather than confrontation. This is especially important when it is considered that people living in South Africa lack many of the requisites of a Nation, a common ancestry, culture, economy, education, and homeland (Smith, 1995).

Parkin (1979) has observed that ethnic and class conflict is now a feature of industrial society. In the South African environment, because of its history, the former must be seen as the greater risk. Retief (1988) considered that cultural differences in South Africa had been increased because of the political situation. The lack of understanding between cultures and identification with one's own group led to suspicion and disparagement of others causing wars and racial conflict. Thomas and Znanieki (1918/1927) considered that fights between races and cultures could be prevented, not by destroying historical differences, but by appreciating their worth in an atmosphere of 'growing acquaintance and estimation' (p. 86). Bulhan (1977) in an outline of a theory of reactive

identification described the three stages of the development of an African intellectual brought up under colonial conditions as propounded by Fanon (1961/1963, 1952/1967a, 1964/1967b). The first was acceptance and assumed assimilation of Westernization, the second an identity crisis between the past and the present, the third a break from colonialism and a move to a commitment to revolution. Three somewhat similar strategies are outlined by Tajfel and Turner (1979; Tajfel, 1981) in their theory of intergroup conflict.

(i)   Individual Mobility to achieve upward social mobility by disassociating oneself from a group that is considered inferior towards one with a higher status.

(ii)   Social Creativity that entails a redefinition of the basis of comparison between one's own and superior groups through the use of criteria that favour the former.

(iii)   Social Competition that calls for a reversal of social roles, which can lead to conflict between groups.

In America the emphasis on "Black", rather than the emulation of White, the search for roots and an African origin, together with the interest in the precepts of Négritude, were all psychological processes of the second stage (Helms, 1993; Tajfel, 1981; Tajfel & Turner, 1979).

Bulhan (1977, p. 163) believed it was possible to add a fourth stage '"Moving With" the "Other" so as to build, together, a human world founded on mutual recognition and fulfilment,' but only after transformation. It is during this stage, when colonialism has been put aside, that cultures can 'affront each other, enrich each other' (Fanon, 1964/1967b, p. 46).

The four stages of black racial identity development described by Helms (1993) follow a similar progression.

(i)   Preencounter where the Black view of the world is subjugated to the prevailing

White. This can be "active" where Blacks compare themselves unfavourably with Whites or "passive" where they seek to emulate and be accepted as Whites. For example, in a study of Blacks and Whites in Gauteng conducted early in 1994 Bornman (1999) found that both Afrikaans and English speaking Whites had a more positive image of themselves than did Blacks. This was significantly the case with Afrikaans speakers who, prior to the first all race election in April that year, still held political power. In addition to the political context Bornman concluded that economics, social and psychological factors also influenced self-image.

(ii)   Encounter, which is a period of uncertainty as the person seeks a stronger black identity, whilst at the same time leaving that of the Preencounter stage.

(iii)   Immersion where the person retreats into being Black according to external cues of what this implies. Emmersion within one's own community can follow this, where a more balanced view of being Black evolves.

(iv)   Internalization of one's Black identity, not from external references, but from a mature internal security, which is sufficiently strong to establish its place among Whites, where this is objectively considered desirable. At this stage people are considered for what they are and not as belonging to a particular cultural or racial group.

Teffo (1996) warned that if Blacks and Whites 'do not want to perish together as fools, a new colourless man will emerge' (p. 102). There was encouragement for this scenario from Sullivan (1953) whose theory and techniques were based on the 'assumption that human behaviour is positively directed toward goals of collaboration and of mutual satisfaction and security', though he added the proviso that this can be 'interfered with by anxiety' (pp. xvii - xviii).

Corder (1990) noted that 'the protection of different standards and mores within an economic and

political framework of "separate development" has ensured that there are wide disparities in the underlying values of South Africa's various subcultures' (p. 7). Blacks are also seriously disadvantaged in terms of living standards, as compared with Whites (South African Advertising Research Foundation, 1999). It could, therefore, be argued that the discrepancies between South African ethnic groups, in terms of their socio-cultural and economic circumstances, at least at the present time, militate against the existence of a common typology. In support of this view, Parry (1994) found in a qualitative study among university students that the majority of the Black women were Afrocentric in their view of the world while Whites were Eurocentric. Hickson, Christie and Shmukler (1990) also found significant differences among Black and White South African adolescents in their response to variables within five world view domains: Human Nature, Human Relationships, People-Nature, Time Orientation and Activity. However, Prinsloo (1995), in the analysis of results of the 16 PF, discovered that the underlying personality structure of different racial groups in South Africa is similar and that more significant differences were found between gender and home language.

1.2   FEASIBILITY OF A COMMON SOUTH AFRICAN TYPOLOGY

A universal structure of values has been proposed (Schwartz, 1992; Schwartz & Bilsky, 1987, 1990) leading to a theoretical model of relations among hypothesised motivational types of values (see Figure 1.1). Based on the findings from 88 samples taken from 40 countries Schwartz and Sagiv (1995) concluded that the hypothesised dimensions of this theoretical model were virtually universal. However, Schwartz and Bilsky (1990) had found that Hong Kong differed in some respects to Western countries, especially as regards a "Power Domain"; and Schwartz also warned

that a truly universal value structure would be unlikely (1992, p.47).

Self-Transcendence

UNIVERSALISM   BENEVOLENCE

SELF-DIRECTION   TRADITION

                    CONFORMITY

Openeness ←————————————————→ *Conservation*
to Change

STIMULATION   SECURITY

HEDONISM

ACHIEVEMENT   POWER

Self-Enhancement
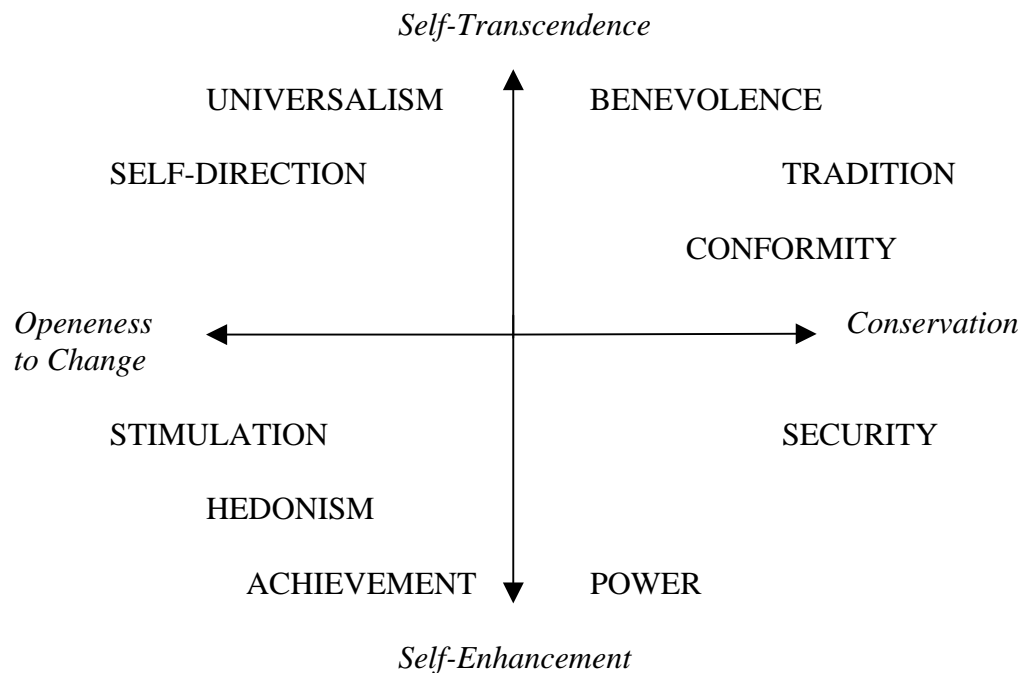
Figure 1.1 Theoretical model of relations among motivational types of values, higher order value type, and bipolar value dimensions (Schwartz, 1992).

Morris (1956), based on the findings of a study on "Ways to Live" among several hundred college students in China, India, Japan, Italy, Norway and the United States, which included values reflected in a number of religions, came to the conclusion that there was an 'orderliness, of structure, in the domain of human values' (p. 198). The findings of Sociomonitor, a study of social change, have demonstrated that, despite considerable differences among South African adults, there are a number of shared values, which could form the basis for a multi-ethnic typology (Market Research Africa, 1995a, 1995b). In cross-cultural research Samiee and Jeogn (1994) have also recognised the importance of identifying similarities, or differences, when evaluating findings from different cultures and countries.

Many similarities in humankind were noted by Eibl-Eibesfeldt (1970), in an ethological comparison: the formation of families and protection of children; the desire for personalised relations; aggression, particularly among men, who are also more inclined than women to seek

higher rank and status; the need to impress; curiosity and imaginative problem solving; the development of language, and individual territory. Kenrick and Simpson (1997) remarked that cross-cultural studies have shown that in nearly all countries many aspects of human behaviour are common.

Jung (1959b) lends support to likenesses in humankind. His theory of archetypes evolved from a belief that there are repetitive patterns in the human condition. The archetypes are a collective unconscious, consisting of 'an inborn disposition to produce parallel images' and 'identical psychic structures common to all men' (Jung, 1956, p. 158). Fromm (1993) disputed Jung's beliefs. He considered that the unconscious had a common content because of the similarity of existence. This did not deny the individuality of each person, but that insights into others' uniqueness and introspection led to the appreciation of universality. Retief (1988) has also observed that in South Africa 'we share a large part of our everyday life-worlds, a country and a common humanity' (p. 183).

It is postulated, and there is some supporting evidence, that all civilized societies can be evaluated in terms of two multifaceted major dimensions (see Figure 1.2). This is elaborated on in Chapters 2 and 3.

Outer/Other-directed
Extraversion

Individualism   Collectivism
Change/Risk   Stability/Security

Inner-directed
Introversion
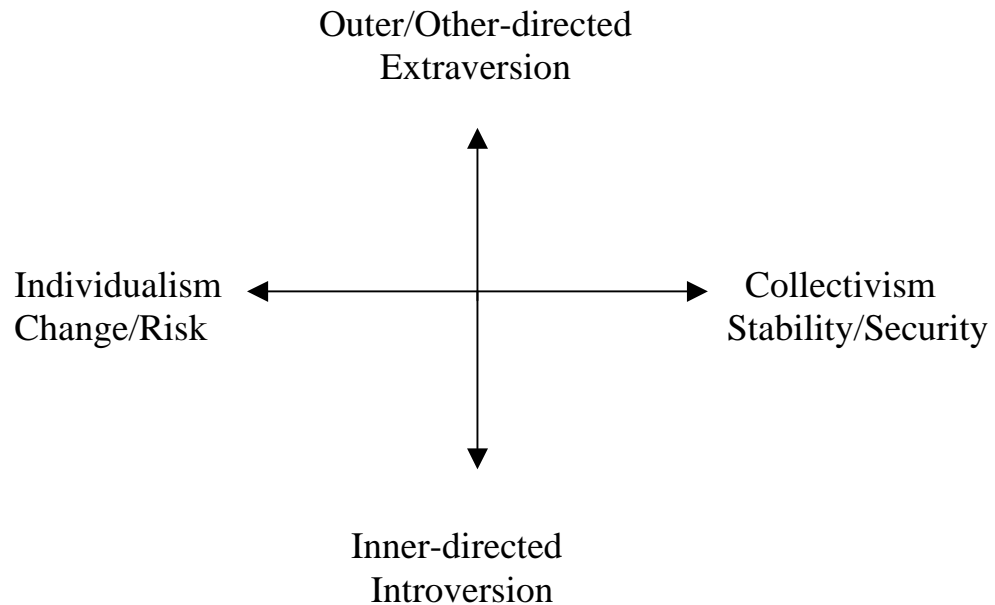
Figure 1.2. Postulated dimensions/facets of a multi-ethnic typology.

Taking these aspects into account, it would therefore not be unreasonable to expect that, despite different economic and cultural backgrounds, there would be sufficient communality for the existence of an underlying South African multi-ethnic typology.

1.3   OUTLINE OF THE STUDY

1.3.1   PURPOSE

The aim of this study is to establish the existence, or not, of a value based typology, which is applicable to all South Africans adults.

The identification of a national, multi-ethnic typology could have considerable relevance in providing a framework in which decisions and policies can be formulated. It would have extensive applications in commerce, politics, and research. Marketers would be able to define target markets more effectively to match their products and promotion, politicians would gain insights into the needs and motivations of the electorate, and researchers would have both a

theoretical and practical framework to explore and extend. Further uses could be in the areas of affirmative action programs, counselling, race relations, training, as well as the formulation of government policy and scenario building.

1.3.2 RESEARCH RESOURCE

The research was derived from the data in Sociomonitor 1997/8 (ACNielsen MRA, 1998). Sociomonitor is an on-going study that has been monitoring the values of people in South Africa since 1976. Initially the project was restricted to Blacks and Whites, aged 16 years and over, living in urban areas with a population of more than 500. However, the universe for the 1997/8 study was extended to include the total adult population of South Africa. A sample of 6,571 was taken representing 25,721,000 people (see Chapter 8 for more details regarding the sample).

1.3.3 METHOD

Subjects were personally interviewed in their home using a structured questionnaire that was administered personally.

The questionnaire included over 150 individual statements related to the measurement of the intensity to which 32 values, 7 society issues and 10 marketing trends, 6 of which were also values, were held. It also covered the ownership and usage of products and services, media consumption, extensive lifestyle and demographic information. The questionnaire is discussed in more detail in Chapter 8.

1.3.4 SEARCH FOR STRUCTURE

If there is a common underlying value structure held by South African adults, then it is to be expected that the relationships between the two major dimensions/facets, of individualism and collectivism, and inner- and outer-directed, as manifested by the 32 common values, would have a polar spatial pattern (see Figure 1.3).

wedgelike regions
emananting from a
common origin

a_1

a_2

a_4

a_3
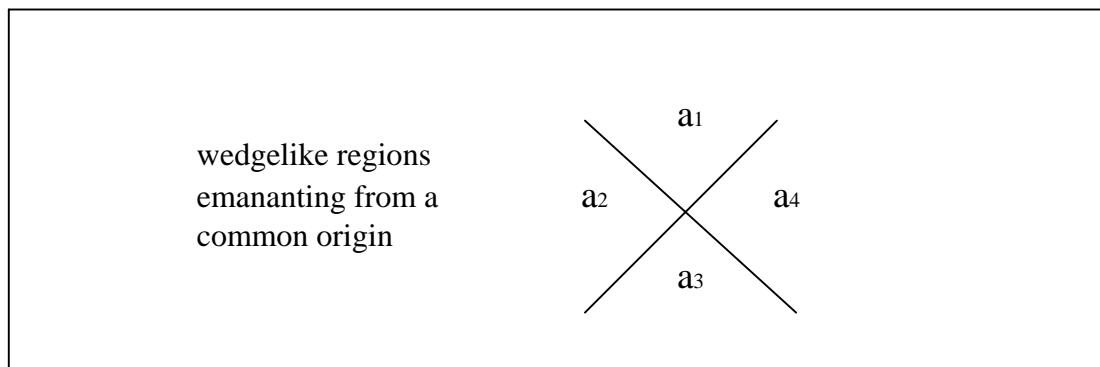
Figure 1.3. Spatial partitions (Levy, 1985).

The interrelationships between individual values, in terms of the degree to which they are related, was evaluated by correlation. The correlation matrix was then converted into distances that were used as inputs for metric multidimensional scaling (MMDS). The output was in the form of the smallest (Mahalanobis) space analysis. This approach was suggested by Levy (1985). The underlying structure was then examined through the use of principal factor analysis. A five-factor solution was chosen on the grounds of parsimony and the identification of a common value system. Informants were allocated to one or other of five groups, or types, based on their highest factor scores. Five common types were identified and described in terms of their values, behaviour, demographics, media usage and lifestyle (see 9.4 Identification of value types). South African perceptions of ethnicity have been influenced by statutory segregation (Louw & Foster, 1991). Therefore both differences and similarities have been a consideration in the identification of a multi-ethnic typology.

1.4   CHAPTER SUMMARY AND OUTLINE

This introductory chapter provides an outline of the key concepts involved in the development of a multi-ethnic framework. It outlines the socio-economic background to the study and its relevance to good governance, marketing and research. Previous research findings, both in favour and against the plausibility of the existence of a multi-ethnic typology, are described and the conclusion reached that on balance the probability is favourable.

The following chapters provide a detailed description of the various steps followed in developing a theoretical framework, the research design, main findings, conclusions, implications and imperatives for further research.

Chapters 2 and 3 explore the two major dimensions, which it is hypothesised universally underlie values. These are respectively, individualism versus collectivism, and inner- versus outer-directed. The concept of values and the way in which they have previously been measured is outlined in Chapter 4. Chapter 5 investigates the notion of typologies as a form of market segmentation, in particular those which are of relevance to this study. The initial Sociomonitor, covering the period 1976 to 1995, is described in Chapter 6. An analysis of the 1995 Sociomonitor data that related to both Blacks and Whites was made in order to identify common values. This exploratory investigation included the merging of values common to both Blacks and Whites to derive a combined typology and set up a possible model that was subsequently evaluated. This was an important step in the process of conceptualising the theoretical framework for a possible South African typology applicable to all adult South Africans, which is outlined in Chapter 7, together with a summary of the conclusions from previous research. The specifics of the research methodology of a redesigned national Sociomonitor conducted in 1997/8 are supplied in Chapter 8. It is from this source that the empirical data for this study is derived. Detailed research findings are provided in Chapter 9. Conclusions, implications and imperatives for further research form the substance of Chapter 10.

Definitions of values, marketing trends and issues, together with statistical analyses, are provided in the Appendices.

Note. In Chapters 2 - 6 there will be continuous summaries in the form of propositions, which are encompassed in the research design. Based on these propositions, the parameters and demographic characteristics of collectivism vs. individualism and inner- vs. outer-directed are outlined in Chapter 7. The findings of the study are evaluated against the conjectured characteristics of these two dimensions in Chapter 9.

CHAPTER 2
INDIVIDUALISM VERSUS COLLECTIVISM

2.1 INTRODUCTION

This chapter traces the origins of the individualism-collectivism dimension in philosophy, anthropology and psychology. It examines the influence of environmental factors, especially those related to Africa, including the relevance of time. African Humanism and the concept of "Ubuntu" are discussed, as well as the Négritude cultural movement and Black Consciousness. The emergence of individualism and the influence of the workplace are explored, together with self-concept and women's emancipation. Finally, the degree to which collectivism and individualism can be considered a dichotomous dimension is examined.

2.2 ORIGINS OF INDIVIDUALISM AND COLLECTIVISM

2.2.1 PHILOSOPHICAL ROOTS

Philosophers since early times have endeavoured to define not only the nature of man, but also the relationships between man, the state and humanity. Is the individual an entity unto himself, or is he moulded, or even determined, by the society of which he is a part? Cultural, economic, familial and religious factors all contribute to the world in which the human being exists. They provide the ethics, ideals, morality, mores, principles and standards against which a person will be judged.

Plato observed, in his Republic, that men have different aptitudes and are dependent on others (Cornford, 1946). Under such circumstances everyone would benefit from being in an interdependent, organised society, where each could apply his or her own abilities. The qualities of the individual soul and the state were perceived to be the same, consisting of reason, appetite and a spirited element. However, the bodily appetite of the individual had to be restrained and there was a need for both mental and bodily training (ibid.). Circumstances could however arise

where the *polis* was not acting in the best interest of the individual, who should then 'revolt against the state or go into exile' (Hall, 1963, p. 212). Murphy (1947) commented that 'wherever individualism fails, especially among the more impoverished, submerged elements of the population, there is clear evidence that the social order has failed, at least relatively' (p. 906). Mill (1859/1889) in his essay "On Liberty" defined the responsibilities of the individual in exercising his freedom and the state in providing a modicum of controls, but suffice to prevent harm between people as a result of their activities. He believed that progress could not be achieved without individual assertion, provided that damage was not done to others, though it could be to oneself. Thomas and Znaniecki (1918/1927) described how the Polish peasant community protected itself by isolation or even banishment of individuals whose behaviour was considered harmful.

2.2.2   ANTHROPOLOGICAL CONSIDERATIONS

Mead (1967) classified 13 primitive societies into three groups, individualistic, competitive and cooperative. This classification was based on the ends to which the individual devotes his/her time and those to which the group directs its activities, as well as the degree to which time and energy were allocated to shared, competitive and individual ends (ibid.) (see Figure 2.1).
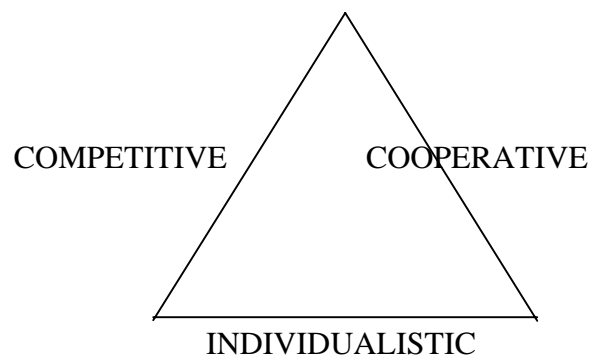
Figure 2.1. The equilateral triangle as geographical simplification for demonstrating the Competitive, Cooperative and Individualistic characteristic. Maximum intensity for each trait has been designated as the midpoint of every side (Zessner, 1967).

Mead found that no society could be regarded as exclusively falling into one or other category. She did note that matrilineal societies were cooperative, while those classified as individualistic had the lowest subsistence level (ibid.). Mead warned against projecting such conclusions onto other primitive peoples falling into her classifications. What characterised individualism in a social system was the lack of 'political forms necessary for group actions' (p. 467). Mead gave the example of the Ammassalik Eskimos, who were nomadic and had no effective control over desertion of one or other spouse, or even murder. In contrast greater societal sophistication came with territorial permanence and defence against invasion, combined with disciplinary control over members. An example of a cooperative society would be the Bathonga, a people living on the Natal coast (Goldman, 1967). This traditional rural community, which was male dominant, had a hierarchical structure determined by age and rank, comprehensive regulations regarding behaviour, including family relationships and work, combined with considerable communality.

Anthropological discernment of the nature of individualism and collectivism will lack generalisation, as it is based, for the most part, on cultural customs and norms, combined with observations of unrepresentative selections of people drawn from various communities. However, it does provide both a qualitative wisdom of the way in which humankind develops and a rich tapestry from which propositions can be derived for subsequent testing. It is also important to consider the widest possible spectrum, as theories developed within an advanced industrial environment are unlikely to be universally applicable (Jahoda, 1979).

2.2.3   SOCIOLOGY

Thomas and Znaniecki (1918/1927) attributed the disorganisation of the family to the influence of a range of values not previously prevalent, including 'new sources of hedonistic satisfaction, new vanity values, new (individualistic) types of economic organization and new forms of sexual appeal' (p. 1167). Tönnies (1887/1963) conjectured two dichotomous societal abstractions, the one emerging from the other. "Gemeinschaft", which was based on natural will, reflected the values of understanding, custom and creed. The family, agriculture and religion evidenced these values. The Gemeinschaft community protected its members. Property was inherited, or

communally owned. Gemeinschaft was characteristic of the fellowship of rural and small urban communities, whereas "Gesellschaft", which was a later development, was derived from rational will, manifested by calculations, concepts and contracts. It developed in larger centres where exchange took place in business, trade, industry and science. Gesellschaft represented the more individualistic and modern values that led to hedonism, greed, materialism, ambition and power.

Religion has its origins in Gemeinschaft, but through its sanctity of family, birth, marriage and death, maintained its influence throughout all of society. It was stronger, because of its family ties, with women and children (ibid.). The development of Gesellschaft led to a change from imagining to thinking. Scientific thought and the development of consciousness replaced belief in gods and spirits. This led to a weakening, even abandonment, of religiosity.

Proposition 2.1

Rural dwellers and those in small urban communities are more likely to be described by Gemeinschaft, while people in larger centres, especially those who have business and professional occupations, will be Gesellschaft.

Proposition 2.2

Orthodox religion is likely to be stronger with collectivists, women and rural dwellers.

Changing economic and social circumstances can also lead to the emergence of new values. Thomas and Znaniecki (1918/1927) noted how rural Polish peasant communities became disorganised as a result of young people working for higher wages in Prussia, often in factories, and returning with new values for which traditional society had no precedents. The loss of moral control by the community led to an increase in criminal activity and violence. However, despite strong efforts to preserve the ways of the past, through social, religious and legal means, often with limited success, a new order emerged, spurred by the 'demand for a regulated, organised and harmonious social life' (p. 1212). Encouragement and endorsement for change came from the publicity given by the press to letters written about specific villages and people by peasants, who also extolled the benefits to themselves of reading and writing (ibid.). Davidson and Rees-Mogg

(1997) described how peasants reduced the risk of starvation that might occur with a crop failure by avoiding new and possibly unsuccessful methods of farming. The preference was to limit the possibility of disaster and forego the chance of being better off. Herskovits (1967) has also noted the reluctance of the least developed classes in society to change to new methods.

Joffe and Sandler (1989a) saw individuation as a form of development throughout a person's life, which could be made more difficult by early failure, especially as 'a factor influencing individuation is the well-being that results from social recognition and approval' (Joffe & Sandler 1989b, p. 231). Bulhan (1985) recognised that such acknowledgement was essential for the development of both life and self.

Proposition 2.3
Individualists are more conscious of the approbation of society than are collectivists.

2.2.4   PSYCHOLOGY

Jung (1923) differentiated between the collective and the individual. Collective concepts 'include *the general concepts* of right, the State, religion, science, etc., current among civilized man' and these 'are also bound up with certain collective ideas, such for example, as the idea of God, justice, fatherland' (Jung, 1923, p. 530). 'The antithesis of collective is *individual*' (p. 531).

Proposition 2.4
Collectivism represents the communal mores of society, whereas individualism is manifested by a disinterest in loyalty to country and family.

The anomaly of a decline in individuality being matched by praise for its existence has been bought to our attention by Fromm (1993). The myth of individuality was manipulated and reinforced through the choice offered by supposedly different yet actually similar commodities. Firat (1991) has also noted that symbolic cultural differences belie a basic similarity.

2.2.4.1 Evolutionary and behavioural psychology

Darwin (1859/1902; 1871/1890; Darwin & Wallace, 1958) in his theory of natural selection through the survival of the fittest, theorised that man, indeed all living things, that were better adapted to the environment, through variations, were more likely to survive. 'All corporeal and mental endowments will tend towards perfection' (Darwin, 1859/1902, p. 669). Darwin, however, did not credit development only to natural selection, as he stated that the 'increased and beneficial use of any part' would also be inherited, though strengthened by the selection process (p. 294). In his later work, he conceded that whether modifications, which could have come about through either increase or decrease in use, would become hereditary was not certain, but probable (Darwin, 1871/1890).

De Beer has credited Wallace with independently coming to the same conclusions as Darwin (Darwin & Wallace, 1958). Wallace, in particular, drew attention to evolution by natural selection during periods of environmental change (ibid.). The idea that accidental variations in man could lead to those who were better suited to the environment being more likely to increase had been proposed earlier by Wells, in a paper published in 1818 (ibid.). Such variations Bergson (1911) believed proceeded in a definite direction over generations, rather than from individual to individual, or as held by the neo-Darwinians from 'germ to germ' (p. 179). Dawkins (1976) was convinced that the unit of heredity was the gene; a viewpoint endorsed by Ridley (2000). There was also, however, a cultural unit, the méme, that included a wide range of phenomena, for example: laws, religious beliefs, music, fashion. Successful genes and mémes were characterised by having 'longevity, fecundity and copying-fidelity' (Dawkins, 1976, p. 208). Dawkins recognised the conflict between the 'selfish' gene seeking to propagate itself and 'disinterested altruism – that has no place in nature' (p. 215), though he realised that man had the ability to gain the upper hand (ibid.). A South African example of this could be the desire for racial harmony by people who had previously been in conflict with each other.

Wright (1995) conjectured that Darwinism had a strong influence on moral values. Whereas Buss (1997, p.387) reasoned that many adaptations have taken place at the 'psychology level.' The

evolutionary principles of natural selection and the survival of the fittest have also been thought to apply to groups (Beck & Cowan, 1996; Hogan, 1998). Caporael and Baron (1997) stated that outcomes at a low level were modified by the structure at a higher level. However, the characteristics of a group could also be influenced by the needs of its members (ibid.). This could lead to the situation where the group was better adapted to respond to the external environment than any individual acting independently (ibid.). Bergson (1911) concluded that within a system there was a carry over from the past and influences from an organisational level helped to determine the future behaviour of its members. This internal causality leads to the emergence of collective properties that were better suited to the environment than the individual acting alone (ibid.). Groups also compete with each other. Wilson (1997, p. 348) observed that both 'altruism and cooperation' always weakened a group's fitness. However, since the degree of negative influence may differ between groups, these qualities can still progress within a comparatively strong group. In Tönnies (1961, p. 55) view, alien creeds, despite initial loyalty to traditional customs and religion, could be disseminated by a 'conquerors' [sic] power. For example, Bulhan (1985, p 25), in his biography of Franz Fanon, who grew up on the French colony of Martinique, described how the first words a Black child learnt to write were "Je suis Francais". Race, colour and class were determinants of societal success. French rather than Creole was the language of choice (ibid.).

Psychological concepts of the individual have developed from the narrow view of the physiologists and behaviourists that man was likened to an animal that could be conditioned according to a number of predictable laws (Hull, 1943, 1952; Pavlov, "n.d.", /19271957, 1960; Sherrington, 1906; Skinner, 1938; Tolman, 1932, 1951; Watson, 1925) to the broader belief that man is an integral part of the economic, social and cultural context of existence. For example, Watson, described by Tolman (1932, p. 4) as the 'arch-behaviorist,' conceived that culture, family and the environment were all part of the conditioning and learning process and that children were independent entities who could be shaped for a saner society (Watson, 1925).

Though much of the experimental work done in Pavlov's (1927/1960) laboratories on dogs investigated one, or more, types of stimuli and a response at a time, he recognised that the

complexity of the input received by the cerebral cortex from the large number of external stimuli could lead to different reflex responses under varying conditions.

The study of behaviour, Hull (1943) believed, could be reduced to mathematical formulae in the same way as had been achieved with the natural sciences. His theory of behaviour, based on a number of postulates and major corollaries, encompassed various stages: reinforcement, generalisation, motivation, inhibition, oscillation and response evocation (ibid.). Behaviour could be defined for both individuals and society, eventually encompassing numerous social aspects, including economic and moral values. Over a period of a hundred years, 'hundreds of equations' would be written, and 'thousands of theorems and corollaries' would be tested in 'thousands of critical quantitative experiments' (pp. 401-402). Hull (1952) anticipated that it would even be possible to predict what a person's verbal responses would be to the behaviour of others. He further concluded that the laws determining individual and social behaviour would be mainly based on the same postulates (ibid.). Koffka (1935) and Köhler (1938a) were highly critical of behaviourism, as it did not take into account 'direct experience' (ibid, p. 11) nor the contextual framework. Koffka (1935, pp. 25-27) differentiated between 'molar' and 'molecular' behaviour; the former related to the environment while the latter was internal to the organism and required external stimuli to be activated. Behaviourism was built on molecular behaviour and did not take into account the total 'Gestalt'. Bulhan (1985) has further criticised behaviourism for ignoring social and political considerations and Hawking (1988) has noted the lack of success in predicting how humans behave through the use of equations.

2.2.4.2 Personality

Allport's (1937) definition of personality captures the relationship between the self and the outside world. 'Personality is the dynamic organization within the individual of those psychophysical systems that determine his unique adjustment to the environment' (p. 48).

Jung (1912/1956) believed that it was culture that resulted in the development of personality and differentiated a person from the mass of humankind. But this did not deny the existence of a

unique personality in the new born child, which was part of its inheritance (ibid.).

Cattell, Eber and Tatsuoka (1970) provided support for the existence of a 'Subduedness-vs.-Independence," or "Dependence-vs.-Independence," dimension from the second stratum source traits identified from second order factors of the Sixteen Personality Factors (16 PF). An analysis of 423 male and 535 female students, that was taken from Russell (1969), using Forms A + B, 1968-1969 edition of the Sixteen Personality Factor Questionnaire (16 PF), generated information on the 16 primary source traits (labelled A-O and Q1-Q2). From these 16 source traits, 8 secondary source traits, labelled QI-QVIII, were identified by second order factor analysis based on the correlations of the primary source traits (ibid.). The "Subduedness-vs.-Independence" factor was derived primarily from 5 of the 16 primary source traits (pp. 16, 17, 120):

E   Submissiveness (mild, easily led, docile, accommodating) vs.
        Dominance (assertive, aggressive, competitive, stubborn).

L   Alaxia (trusting, accepting conditions) vs. Protension (suspicious, hard to fool).

M   Praxernia (practical "down-to-earth" concerns) vs. Autia (imaginative, Bohemian, absent
        minded).

Q1   Conservatism of temperament (conservative, respecting traditional ideas) vs. Radicalism
        (experimenting, liberal, free-thinking).

Q2   Group adherence (group dependent, a "joiner" and sound follower) vs. Self-sufficiency
        (self-sufficient, resourceful, prefers own decisions).

The pattern matrix for this factor is shown in Table 2.1.

Table 2.1

Second-stratum factor pattern matrix - Independence (vs. Subduedness) broken down by gender*

Source Trait	Females	Males
E	58	66
L	37	57
M	54	50
Q1	74	61
Q2	37	54

* Decimal places omitted.
** Based on data from 423 male and 535 female college students.

"Independence" signifies a personality that is more self-sufficient and rejects the status quo and group structures in favour of change. "Independence" scores, which were considered to be determined to a considerable extent by heredity, were found to be significantly higher with men than women (p. 120).

Proposition 2.5

Collectivists will keep to the well tried and traditional, whereas individualist will be more likely to challenge the status quo and be in favour of change.

Proposition 2.6

A higher proportion of men will be strong on an individualism dimension, while women will be stronger on collectivism.

Cattell et al. (1970, p. 252) noted the 'quite substantial relations' between values and personality, identified by Morris (1956). On a sample of 115 males Morris (pp. 97-98) had found significant correlations between seven temperament traits, derived from factor analysis, named Active, Vigorous, Impulsive, Dominant, Stable, Sociable and Reflective, as measured by the *Thurstone*

Temperament Schedule and 13 "Ways to Live" (see Table 2.2).

Table 2.2
<u>Summary of Ways to Live questionnaire</u>

Way	Title	Content
1	Apolonian	Refinement, moderation, restraint, preservation of the best attainment
2	Buddhistic	Self-sufficiency, understanding of self; avoidance of outward activity
3	Christian assertiveness	Sympathy, concern for others; restraint of one's self-
4	Dionysian	Abandonment, sensuous enjoyment of life; solitude and sociability, both are necessary
5	Mohammedan	Energetic, cooperative action for the purpose of group achievement and enjoyment
6	Promethan	Activity, constant striving for improved techniques to control nature and society
7	Maitreyan	Flexibility, diversity within self; accepts something from all other paths of life
8	Wholesome home enjoyment	Carefree, relaxed secure enjoyment
9	Quiet receptivity	Quiet receptivity to nature yields a rich self
10	Stoic self-control	Dignity, self-control, but no retreat from world
11	Contemplation	Give up the world and develop the inner self
12	Physical adventure	Outward, energetic activity, use of the body's energy
13	Self-sacrifice	Let oneself be used; remain close to persons and to nature

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In another study of 47 students Morris (pp. 100-103) found a 'general congruence between the results for the 16 PF and the liking of 13 "Ways to Live".

2.3   ENVIRONMENTAL FACTORS

Individualism and collectivism have been thought to be strongly related to the way in which people behave in social circumstances and for this reason have been considered as promising dimensions of the variation between cultures (Triandis, 1980; Triandis et al., 1986). Triandis et al. considered collectivism and individualism from three viewpoints: their antecedents, correlates

and socialisation patterns. They noted that collectivism was more likely to occur with large families and in agricultural communities, where there was a need to work together. It related to a high respect for group requirements and led to unselfish social patterns of behaviour. In contrast, complexity, higher standards of living, mobility and urbanisation preceded individualism, where behaviour was more self-centred and independent. People in individualist cultures were 'good at entering and leaving groups' (p. 369) and did not form the longer-lasting and deeper relationships that characterise collectivism. Herskovits (1967, p. 488) believed that the extent to which there is conservatism and cultural change is determined by the 'interplay between environmental, historical and psychological factors.'

Proposition 2.7

Collectivism is stronger in rural areas and among larger families.

Proposition 2.8

Individualists are more inclined to selfish behaviour and self-interest than collectivists.

Proposition 2.9

People who are strong on individualism will lead more multifarious lives than collectivists. They will be in a greater diversity of occupations, requiring higher qualifications. They are more likely than collectivists to have a wider range of interests, participate in a higher number of social activities and consume a larger variety and range of media.

2.4   TIME

A manifestation of the relationship between individualism and complexity, noted by Triandis (1990), is attention to time. In larger cities time becomes more important. In less complex environments time may be reckoned in hours, or even days, whereas industrial and technological cultures conceptualise time in minutes. In contrast, in African traditional life, time is related to events (Mbiti, 1990). An African sitting down is not wasting time he is 'either waiting for time or in the process of "producing" time' (p. 19). The day, the month, the year are measured by

occurrences: sunrise, the cattle enter the kraal, the phases of the moon, the rainy and dry seasons. This differs from Kant's (1781/1897) exposition that time is not determined by 'outward phaenomena [sic]', but is the 'form of the internal sense, that is, of the intuitions of self and of our internal state' (p. 30). Mbiti uses the Swahili words "Sasa" (Micro-time) and "Zamani" (Macro-time) to describe the African concept of time. Sasa is where people have been, are now, or could be soon. It stretches back to those who are remembered, even up to five generations, but only a few months forward to a forthcoming event. Sasa time is 'about to occur, or in the process of realisation, or recently experienced' (p. 22). This is not unlike Heidegger's (1927/1962, p. 425) conceptualisation that Dasein, used by Heidegger instead of "self" (Binswanger, 1963/1975, p. 17), 'traverses the span of time' between life and death. The '"Present" … is *held* in that future which is in the process of having-been' (Heidegger, 1927/1962, p. 411). Zamani is also past, present and future, overlapping with Sasa, but encompassing all of history and pre-history, including the primordial myths, which are transferred orally through the centuries. For Sullivan (1953, Vol. 2, p. 8) time also had a 'somewhat imaginary' past, but unlike Sasa, it reaches into the future, because much of life is goal orientated. 'Man the person lives with his past, present, and the neighbouring future all clearly relevant in explaining his thought and action' (Sullivan, 1953, Vol. 1, p. 369).

In England the development of the railways led to a need for a standard time at each station, prior to which each town kept its own time, but uniformity was only established as late as 1880, when Greenwich Mean Time became official (Faith, 1990).

Sequential and synchronic time have been contrasted by Trompenaars (1994). The former relates to a sequence of events following on from each other and is commonplace among Western business people, but ignores simultaneous and shared activities; the latter, which is similar to Sasa, takes account of processes running in parallel. Synchronic time is circular and takes account of the past, present and future. This can lead to a less strict adherence to time schedules (Kaunda, 1967).

Firms from countries where synchronic time is the norm, such as Japan, take a much longer-term view of business than companies in a country like the United States, where sequential time is dominant (Hampden-Turner & Trompenaars, 1993).

Proposition 2.10
Individualists will be more conscious of future time than collectivists.

2.5   UBUNTU AND AFRICAN HUMANISM

Ubuntu, defined by Khosa (1994, p. 13) as 'I am because you are and you are because we are', exemplifies the overriding principle of the distinctly African philosophy of personal action, within the confines of the well-being of the community. Ubuntu is expressed by the Xhosa postulate 'umuntu ngumuntu ngabantu'- a person is a person through other persons (Shutte, 1996, p. 28), in Pedi as 'motho ke motho ka bangwe' - man is a man through others and in Zulu by 'umuntu ngamuntu ngabanye' - a person depends on others to be a person (Teffo, 1996, p. 103,). The concept of Ubuntu is more extensive than existentialism. Dasein, 'the manner of Being' (Heidegger, 1927/1962, p. 32) 'exists factically [sic] in the way of Being with Others' (p. 463), rather than through others.

Ubuntu is in conflict with individualism, which is more selfish and self-centred, yet differs from collectivism, where the rights of the individual are subjugated to the common good. Ubuntu is synonymous with African Humanism. It is an integral part of the African existence (Nöthling & Ramotsei, 1998). It has religious implications in that there is cognisance of one's ancestors, who will be joined in the after-life. Elderly people are respected because they will soon be with the ancestors and, as such, are intermediaries between this world and the next. Fromm (1949/1956) observed that man's happiness depended on the totality with previous and forthcoming generations, as he did not want to be alone. The influence of ancestors whose knowledge, based on tried and proven methods, was greater than that of the living, has also been remarked on by Tönnies (1961).

The individual has been conceptualised as part of 'a chain of vital forces . . . being joined from above to the ascending line of his ancestry and sustaining below him the line of his descendants' (Teffo, 1996, p. 103). Behaviour that harms group structures, such as family, community and organisations, weakens the ties with the past and threatens the future. However, Ubuntu is less restrictive than collectivism, as there is great respect for individuals and their rights within the social unit (Khosa, 1994). There is, however, a likeness with Riesman's (1978) 'tradition-directed' society where the individual belonged and had 'a well-defined functional relationship to other members of the group' (p. 11).

Sartre was a personal friend of Fanon (Bulhan, 1985; Fanon, 1961/1963) and there is a remarkable similarity between the concept of Ubuntu and his theory of the "other" (Sartre, 1943, 1956). 'Le pour-soi s'éprouve comme objet dans l'Universe sous le regard de l'Autre' (Sartre, 1943, p. 603) translated as 'the for-itself experiences itself as an object in the Universe beneath the Other's look' (Sartre, 1956, p. 520). Alternatively, as Good (1978) paraphrased it 'every action or choice must take into account the necessity of being an object for the Other' (p. 165). There are also similarities in Binswanger's (1963/1975) "Daseinanalyse" that approached man from the viewpoint that Heidegger's "Dasein" (p. 17) was 'a being whose essence is to be-in-the-world' (p. 67). The behaviour of the Dasein was conditioned by a 'world-design' that incorporated both the past and the present. People with mental illness would dissociate themselves from the people around them and 'assume no responsibility' for them (p. 116). Their future horizons would become very limited. For the normal person, in the words of Sartre, (1943) 'ces que l'homme, étant condamné à être libre, porte le poids du monde tout entier sur ses épaules: il est responsable du monde et de lui-même en tant que manière d'être (p. 639), translated as 'man being condemned to be free carries the weight of the whole world on his shoulders; he is responsible for the world and for himself as a way of being (Sartre, 1956, p. 553).

The traditional African concept of society is foreign to individualism and capitalism. In order to survive, the community must work together and share its wealth and the rewards of its labour. Otherwise, it will not endure and people will die. A person who becomes well off, or a member of the élite, has taken something that belongs to others and endangers the whole community. Ubuntu

has even been singled out as 'the very antithesis of the concept of individualism and sheer greed inherent in capitalism' (Ranunga, 1996, p. 142). The introduction of the principles of Ubuntu into the workplace would reduce the adversity between managers and trade unions (Mbigi,1993).

Sindima (1995, p. 212), referring particularly to Malawians, differentiated between 'moyo . . . the foundation and purpose of creation', literally life, and "umunthu" which is everything that makes up the values of life. He outlined a schema of the community of life in an idealised African society with moyo on all sides (see Figure 2.2).

Umunthu

Moyo   Moyo

Community   Bondedness   Justice and Power

Moyo   Moyo

Nature
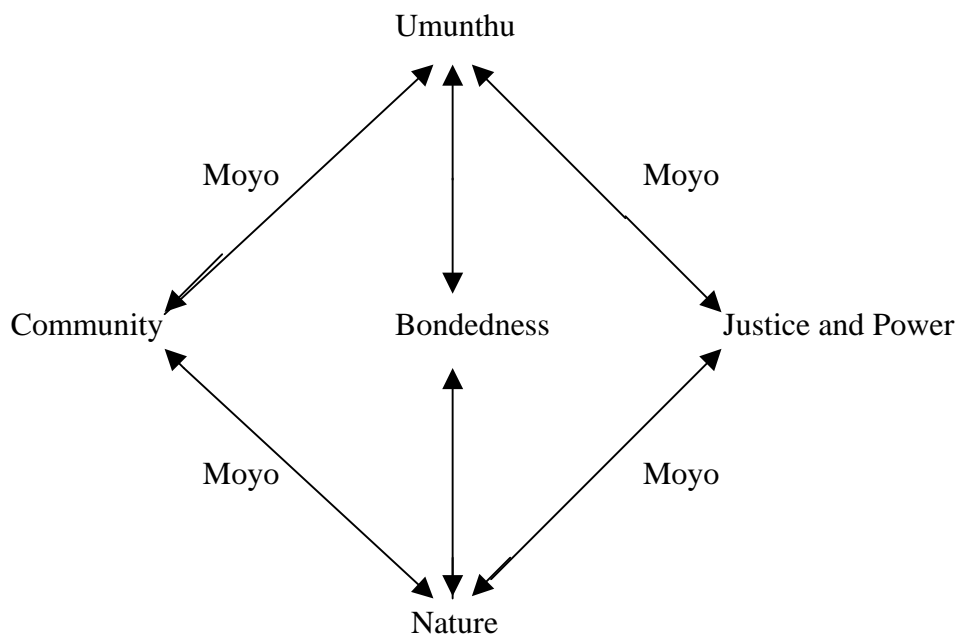
Figure 2.2. The community of life (Sindima, 1995).

Moyo can only be fully realised through the generosity of the community. Individualism is in conflict with this ethos of sharing and helping to perpetuate existence for all into the future. Justice and power provide the framework for well-being, rather than a focus on human rights, which inhibits involvement in a community. There is also a concern with labour, because a community can not afford idleness. Nature is an essential part of moyo, as it provides the wherewithal for life and must not be over exploited. Technology is a threat to nature, not only because it jeopardises its continuity, but it also deprives those who rely on nature's benefits for their survival. In the centre of Sindima's schema is 'bondedness' that 'gives people consciousness

of their part of others and sharing a common destiny with nature' (p. 214).

Nyerere (1969) attempted to apply the principles of traditional African society to the development of Tanzania. The Arusha Declaration of the Tanganyika African National Union (TANU) set out the policy for a socialist state (ibid.). The intention was to create a truly socialist society in which people are equal and all our workers free from capitalism and feudalism. Development would come from hard work and the use of intelligence. The priority would be on production to meet basic needs, though social values would be looked after and nature protected (ibid.). A manifestation of this agenda was the "ujamaa" (socialism) village where people would work for the good of all (p. 351). There were many reasons why the ujamaa villages failed (Freyhold, 1979). These included the difficulties of creating a surplus to share, the impracticality of common decision making, especially in larger villages, a lack of financial expertise and embezzlement, together with the inconsistency and inadequacies of state intervention. Fundamental to the lack of success was the reduction of equal effort to the level of those with the lowest commitment. Inevitably, people gave priority to their private farms and to satisfying their needs through their own individualism. Freyhold came to the conclusion that unless the interests of peasants is the prime concern of a political party, then communalism will not succeed. Ujamaa had been the concept of intellectuals, in particular the President, and did not have the broad support of TANU party members (ibid.).

Etzioni (1991, p. 35) considered that there was always a 'creative tension between individual rights and the needs of the community' and that society is at its optimum when the needs of these two forces are balanced. The conflict between human rights and cultural tradition was singled out by Bennett (1996), the former was in favour of the individual, the latter the family. Customary law, which is patriarchal, favoured 'senior men' to the disadvantage of minors and women (p. 86). It would also be contrary to the spirit of Ubuntu where there was respect for older people, regardless of gender.

Proposition 2.11
Individualism and collectivism are poles of a continuum within which African Humanism falls.

Proposition 2.12

Those holding communal values are more inclined to Ubuntu than those with individualistic values.

Proposition 2.13

Regard for nature as a resource will be positively related with Ubuntu and negatively related with individualistic values.

Capitalism was regarded by Nkrumah (1964/1974) as an advanced form of slavery or feudalism. Like Nyerere, he equated socialism with communalism. Since under capitalism marked differences in wealth emerged, exploitation must exist. The restoration of egalitarian humanism could only be achieved through socialism (ibid.). Nkrumah (1970, p. 14) also perceived that the growth in capitalism went hand in hand with individualism, leading to the decline in communalism and the 'collective spirit'.

Proposition 2.14

Individualism is related to private ownership and opposed to communal enterprise.

The inappropriateness of tribal ritualism to prepare a person for the problems of an industrial society was recognised by Kaunda (1967). The opportunity for individual success, based on merit, in an urban environment, was also accompanied by the threat of failure that was outside the experience in traditional rural society.

2.6   NÉGRITUDE

Négritude, a designation given by the West Indian poet Aimé Cézaire (Bulhan, 1985), started as a cultural movement in the early 1930's, later developing into a philosophy of humanism and a cry for liberation (Senghor, 1966). It was a necessary consequence of an historical period (Teffo, 1996). Perhaps a forerunner of Black Consciousness, it espoused the view that Africans had

reason for pride.

Négritude has been described as a rediscovery of self from the origins of the past, in protest against a dominant culture (Bakker, 1996). Colonialism might have imposed a predominant ethos implying inferiority (Gurin & Epps, 1975), but Africa had something to offer. Picasso had found Negro art a rich source of inspiration (Elgar & Maillard, 1956). Wasn't Africa, after all, the origin of humankind; the home of ancient civilisations (Senghor, 1988). The 'images analogiques, mélodieuses et rythmées' (Senghor, 1988, p. 222) of its arts: poetry, dance, music and painting were all features of a distinctive African personality that could be called Négritude (Senghor, 1966). In the development of a universal civilisation, Négritude was already a primordial contributor (Senghor, 1988).

Kaunda (1967, p. 57) was somewhat dismissive of 'this négritude cult', as it is low in the consciousness of 'the people on the ground in Africa.' This was attested by Mbiti (1990, p. 262) who regarded Négritude as an élitist myth, lacking in taboos, feast days and ceremonies, 'nobody in the villages understands or subscribes to its philosophical expression.' Sono (1993) also downgrades the influence of Négritude to a minor role in 'validating, intellectually, the notion of blackness' (p. 113).

2.7   BLACK CONSCIOUSNESS

Black nationalism, or collective consciousness, which developed in the United States in the late 1960's, entailed a shift from blame of individual Blacks to censuring the system that had led to their negative circumstances (Gurin & Epps, 1975). In a number of studies, conducted from 1964-1970 among students from historically Black universities in the United States, Gurin and Epps explored the conflicts between personal achievement goals and group commitments. They came to the conclusion that students acknowledged the 'special privilege of being young, gifted and Black' in their efforts to achieve their identity both as members of a group and as individuals (p. 406). Corder (1988, p. 17) observed that a number of Blacks in South Africa were not unaware of these developments, a point emphasized by Sono (1993). At that time, for many who

had "made it", Black Consciousness was recognised as one of the contributors to their success.

Corder (ibid.) declared:

> *It taught a person to be proud to be Black, to be pleased to be Black, to be*
> *confident to be Black; because a Black person was as good as any one else,*
> *if not better. The political extension of what became, for many, essentially a*
> *philosophy of non-violence and self improvement by self achievement, was*
> *that 'if we are equal, then we should have equal political rights'. (p. 17)*

Steve Biko is generally recognised as the seminal thinker leading to the development of the Black Consciousness movement in South Africa (Biko, 1978; Sono, 1993). He was critical of the lack of resistance of Blacks to the "system" and saw the need for "conscientization" to enable people to confront their difficulties and give them hope. Since Whites were the problem there was little to be gained in working together with either those in power, or liberals who were in favour of multiracialism within the status quo, an aspect emphasised by Manganyi (1973). Blacks must gain control over their own destiny and develop economic, mental and political independence (Biko, 1978). Black Consciousness should also have some relevance to the future as well as the present and the past (Manganyi, 1973). Black Consciousness represented a sharing of suffering. This common experience of "being-black-in the-world" led to solidarity; an appreciation of a revival of communalism, a rejection of individualism and materialism. It should be used for developing a future responsibility.

In addition to the Black South African Students Organisation (SASO) that essentially represented the needs of students, a Black political organisation, the Black People's Convention (BPC), initially opposed by Biko, was formed (Sono, 1997). The BPC intended to increase its membership so that it could represent the majority of Blacks and then bargain with the government. Biko was against confrontation and the armed struggle. He was in favour of working within the law and felt that time was on the side of the Blacks. The moral right of the Black person's position, already being reflected in sport, would lead to its inevitable acceptance by Whites (Biko, 1978). Biko envisaged a non-racial society where there was no need for the

protection of minorities, as everyone had equal rights (Biko, 1978). In September 1976, Biko died while in police custody. Before the end of that year some 17 organisations that promoted or supported Black Consciousness, often with political ends, were banned (Corder, 1988).

The situation in which people found themselves was credited by Teffo (1996) as a determinant of their value system. Black Consciousness was a means of escaping from the role of scapegoat. Like Négritude, it was born out of circumstances. It did have its purpose, but the state of affairs has now changed and it has lost its relevance. As a result of the dismantling of apartheid the Black Conscious Movement has lost momentum (Sono, 1993).

Proposition 2.15
Black Consciousness historically has been of considerable importance in differentiating Blacks in South Africa from other racial groups. However, its significance is now declining and this enhances the probability of establishing a common cross-ethnic identity.

2.8   EMERGENCE OF INDIVIDUALISM

Durkheim (1894/1989) noted how, as the division of labour increased, so did the rise of individualism, since the control exercised by a collective consciousness weakened. The consciousness of a group was formed very slowly and reflected to a high degree the traditions of the past. It was the older generation who influenced the younger, but as society became more complex the authority of the elderly was reduced. It was also the younger people who were more likely to move to urban centres where there were less older people, resulting in fewer cultural and moral restrictions. Quoting from the *Annales de la ville de Paris*, Durkheim stated that in 1881 there were more people aged between 20 and 25 in Paris than in the rest of the country. However in South Africa it is the middle age groups that are most likely to be found in urban areas (South African Advertising Foundation, 1997) (see Figure 2.3).
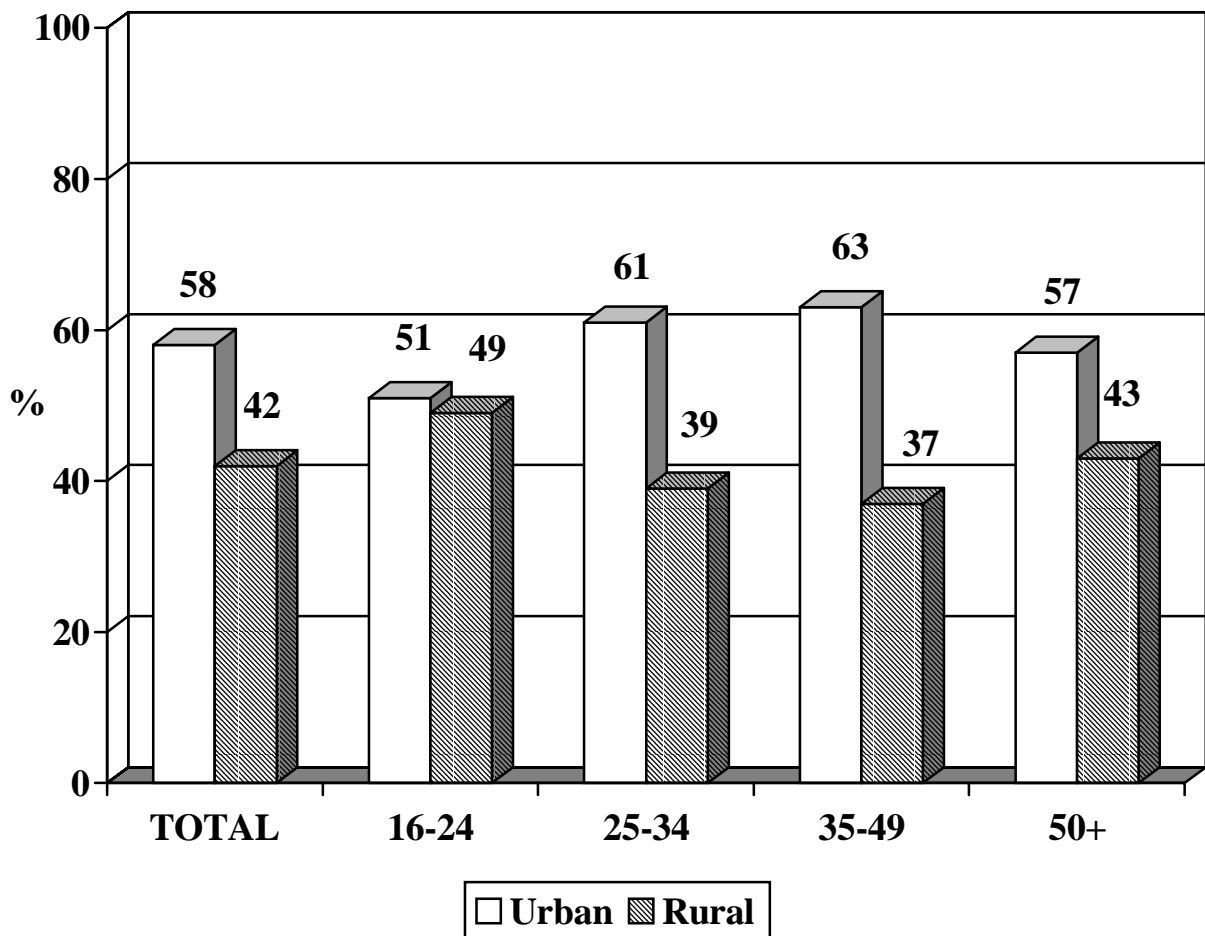
Figure 2.3. Comparisons of South African urban and rural age profiles (South African Advertising Research Foundation, 1997).

Inglehart (1990) surmised that 'the worldviews that prevail in given societies can change…but they change gradually, in large part through intergenerational population replacement' (p. 424). Throughout history individualism would develop, accelerated by the division of labour that goes hand in hand with the growth of civilization and urbanisation (Durkheim 1894/1989). This can lead to conflict between self and society.

Proposition 2.16
Individualism is stronger with younger than older people.

Proposition 2.17

Individualism increases with urbanisation.

Proposition 2.18

In modern day South Africa, it is to be expected that migrant workers, squatters and those who have not been a long time in an urban area will be in a transitional stage between collectivism and individualism.

The development of individualism has been a feature of American society (Yankelovich, 1981) and is likely to be universal (Schwartz, 1992). The term "individualist" has been described by Murphy (1947) as coming 'to signify one who defies the encroachments of others, seeking to assert the

legitimacy of his own way' (p. 527).

The last decade of the 20th century heralded a period where the individual came to the fore (Naisbitt & Aburdene, 1990). The technological development of computers, faxes and cellular phones provided the means for people to take advantage of global networks and to work outside corporate structures. Some manufacturers had recognised this change and were moving away from mass production to supplying products to meet personal requirements. For example, Volvo provided the option of more than 20,000 combinations of their motor vehicles; in sharp contrast to the philosophy behind the launch of the Model T, which was available only in black (p. 286).

The decline of the nation-state has been predicted by Davidson and Rees-Mogg (1997) as future governments will not be able to collect taxes from numerous Internet and computer network transactions that defy national borders. This reduction in revenue will limit the ability of politicians, already discredited by personal shenanigans, to distribute social largess to their supporters and maintain their authority through force. Individual entrepreneurs and businesses will also be less dependent on a specific location. If their earnings are threatened by the state, they will seek a more accommodating environment elsewhere.

Proposition 2.19

People who are computer literate and have access to the Internet are more likely to be individualists than collectivists.

2.9   INDIVIDUALISM AMONG SOUTH AFRICAN STUDENTS

In a study conducted among students of the University of the Free State, Terblanche (1996) found that Afrikaans and English speakers were predominantly individualistic, whereas those whose mother tongue was the vernacular were mainly collectivist in their tendencies. He considered that the individual-collective dimension was most important and had several implications for teachers. Collectivist students preferred working in small, rather than large, groups. They felt positive to competing with other groups, but negatively towards interpersonal competition, which impaired harmony. Even when there was a difference of opinion in a group of collective students the inclination was to avoid argument. Achievements of the best students went against equality and were detrimental to learning.

Proposition 2.20

Blacks are more likely to have collectivist and Whites are more likely to have individualistic tendencies

2.10   INDIVIDUALISM AND COLLECTIVISM IN THE FAMILY

In a collectivist family there were economic obligations (Hofstede, 1994). Members were expected to pool their resources for the benefit of others. Those in employment supported those that were not. There were also social commitments. Attendance at funerals and other family ceremonies was expected, almost mandatory. In the collectivist family, a person's actions were judged in a social environment. A transgression, if discovered, led to humiliation, rather than the guilt experienced at a personal level in an individualistic culture. Hofstede also contrasted the differences in the role of children in a collectivist family and an individualistic society. In the former, children were strongly influenced by others, whereas in the latter, independence was

encouraged. For instance, in the United States many students financed their own education, through work and loans. There had also been a change of policy in the Netherlands, where the government encouraged independence by giving educational allowances direct to students, instead of to their parents.

Proposition 2.21

People with close family ties will be more likely to hold collective values.

2.11   INDIVIDUALISM AND COLLECTIVISM IN THE WORKPLACE

The growth of industrialization financed by capitalists led to the exploitation and impoverishment of the worker was a point of view held by Marx (1867/1982). He considered that 'the social combination of labour processes appears as an organised suppression of his individual vitality, freedom and autonomy' (p. 638).

Marked differences were found in the personality of modern and traditional working men in Pakistan (Suzman, 1973). Fourteen male workers who scored in the top quartile on OM-1, an attitudinal measure of modernity, were individually matched, in terms of years of education and months of factory experience, with 14 respondents in the OM-1 bottom quartile. The respondents, all of whom had spent the first fifteen years in rural areas, where taken from subjects interviewed as part of the Harvard Project on Social and Cultural Aspects of Economic Development (The Six Nation Study). Interviewing in Pakistan had been done 'around 1964' (p. 134). Results indicated that men with a modern orientation were more likely to have a significantly higher correlation ($p=.001$) with a number of measured cognitive and personality characteristics: vocabulary, syntax quality, level of abstraction and analytical ability. There was also a significant negative correlation ($p=.001$) with rigidity. Those with better education in the traditional group were more religious than their modern counterparts. They were also chauvinistic, lacking in empathy, and looked to traditional authority for guidance.

Proposition 2.22

Collectivist are more likely than individualists to support and participate in traditional and religious activities.

Proposition 2.23

Emancipation from traditional authority is a feature of individualism.

In a study conducted in 1979 by Yankelovich, Skelly and White, among a representative sample of Americans who worked full-time or part-time, two groups were identified. Eighty three percent of the sample of just under 3,000 were classified as "Mainstream Majority". The remainder, whose parents like themselves had higher levels of education, were termed "Strong Formers". This group was younger, had greater representation among professionals and was far more likely to focus on personal inner needs at the expense of traditional collective structures (Yankelovich, 1981) (see Figure 2.4).
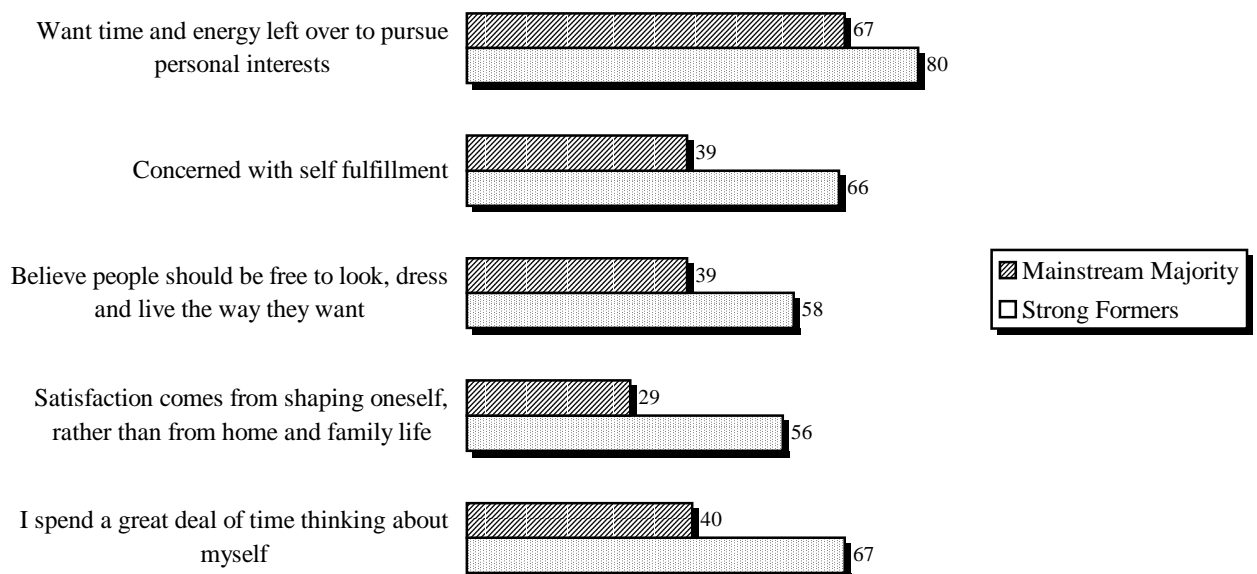
Figure 2.4. Creativity as life-style (Yankelovich, 1981).

Proposition 2.24

People with higher levels of education and success in achieving professional status are more inclined to their own rather than collective needs.

Hofstede (1979) compared the findings of two surveys conducted in 1968 and 1972 within the subsidiaries of a large international company. Sixty statements related to values, perceptions and satisfactions formed the basis of enquiry in 40 countries. Hofstede felt that the results would clearly show national differences, as the employees in each country were similar in terms of education and the type of work they were doing. Samples from each country were also matched by occupation. One of the four discriminating dimensions that Hofstede identified was individualism. Those with a high level of individualism (High IDV) took independent responsibility for their own and family's welfare, whereas those with a low level (Low IDV) recognised the value of the extended family and organizations to their well-being (see Table 2.3). Hofstede (1980) found that there was a correlation of .82 between per capita GDP, as measured in 1970, and IDV.

Table 2.3
The individualism values set

High IDV	Low IDV
In society, everybody is supposed to take care of themselves and their immediate family	In society, people are born into extended families or clans which protect them in exchange for loyalty
Emotional independence of individual from organization	Emotional dependence of individual on organization
Autonomy, variety, pleasure, individual financial security	Expertise, order, duty, security provided by organization or clan
Belief in individual decisions	Belief in group decisions

Proposition 2.25

It is to be expected that not only will individualism be stronger in countries with a higher per capita income, but also that people who are well off will be more likely to be independent than those who are poor. South African Blacks, because of their comparatively lower Human Development Index, only 55% of that of Whites (Central Statistical Service, 1995), would be less independent than their White counterparts and more likely to be collectivists.

Hofstede (1980) placed South Africa in 16th position behind Australia, the United States, Canada, New Zealand and the wealthier European countries on an Individualism Index (IDV). Though Hofstede does not give the racial mix of employees, it is probable that few Blacks would have been included, if when the fieldwork was done is taken into account.

2.12   CIVILIZATION, DEVELOPMENT AND INDIVIDUALISM

Order is a requirement of civilization (Freud, 1930/1982). The price the individual pays for the greater security of a collective of individuals, within family units, is a limit on opportunities for satisfaction (ibid.; Sullivan, 1956). Civilization cannot succeed unless it is able to restrain man's aggressiveness, strength and sexuality. The need for liberty against the 'will of the group' is a focal 'part of the struggles of mankind' (Freud, 1930/1982, p. 33). Freud differentiated between the 'egoistical' urge of the individual for happiness and the 'altruistic' urge towards being a member of a community (p. 77). There is thus a conflict between the desire to pursue one's own goals and participation in mankind's development.

Proposition 2.26

Adherence to group structures, such as the family, and even the nation, will be accompanied by a desire for law and order. Community involvement would also be a feature of a collective orientation.

In Poland the dissemination of information through newspapers and books had a major influence on the development of individualism (Thomas & Znaniecki, 1918/1927). However, those who

wanted to improve their knowledge of the outside world and work position met with extensive criticism from traditionalists. The community had in the past survived without knowing how to read and write. Information obtained from traditional sources, such as the priest, 'news-bearers and "wise men"' had served it well (p. 1362). Why should it now change? The application of more effective farming methods learnt from newspapers was greeted with scorn, until the evidence showed that improved yields were the result. Furthermore, resistance to individual intellectualism was also present, because it threatened the moral values and cohesiveness of the community.

Proposition 2.27

People with higher levels of education, especially readers, are more likely to be individualists. They are also likely to have higher incomes, as they are more knowledgeable and up-to-date with modern techniques.

2.13   INTERCULTURAL SENSITIVITY

In a study at the University of Hawaii among 46 MBA and 93 graduate students, Bhawuk and Brislin (1992) found that intercultural sensitivity could be measured using the constructs of individualism and collectivism. A 46 item Intercultural Sensitivity Inventory was designed to evaluate how people were likely to behave in various situations in a country high on individualism, like the United States, or where collectivism was more dominant, as in Japan. Respondents were asked to imagine that they were living and working in the United States and to respond to the first 16 items of the measuring instrument that related specifically to collectivism and individualism. They were then asked to repeat this procedure for an identical 16 item set, but this time imagining that they were in Japan. There was no rotation of countries rated, and this might have led to an order bias in the findings. A further 14 statements intended to measure flexibility and open-mindedness were then covered. The inventory was given in classrooms, where some students completed it, while others returned it the following week. This lack of control could have resulted in people being influenced in their responses by outside sources and by the time period when the questionnaire was completed. Factor analysis with varimax rotation

was used to explore the underlying structure of the separate ratings of the US and Japan for both sub-samples of MBA and graduate students. Two factors were found to account for the greater proportion of the common variance; except for the graduate ratings of the US where three factors accounted for 81%, but one factor could not be meaningfully interpreted. The first factor had high loadings on all but one of the 10 items relating to individualism and the second on all those designed to measure collectivism. The results indicate that collectivism and individualism are valid concepts.

2.14   SELF-CONCEPT

Bochner (1994) investigated whether the self-concept would be more group inclined and less ideocentric in Malaysia, where collectivism was high and individualism low, compared with Australia and Great Britain, that have higher Hofstede country Individualism Index (IDV) scores (Malaysia 20, Australia 90 and Great Britain 89) (Hofstede, 1980). Subjects were 26 Malaysian teachers and educational administrators, 32 Australians with White-collar occupations and Anglo-Celt [sic] backgrounds, and 20 British members of Oxford University's Department of Experimental Psychology. They were asked to complete 10 sentences, all of which started 'I am', only seven of which were used in the analysis. This was a modification of the TST or Twenty Statement Test; which Bochner had found led to 'diminishing returns' (Bochner, 1994, p. 276). The first seven statements were then coded into one of three categories: Id: which was about personal qualities; Gr: related to group experience and membership, and demographics; Allo: concerned with self-references. A weight was given to each statement, ranging from 7 for the first sentence completed to 1 for the seventh. Id, Gr, and Allo scores were then calculated for each subject.

The results showed, as had been hypothesised, that the Gr scores were significantly higher with the Malaysian participants and the Id scores in the Australian and Great Britain samples. It should be noted that the number of unweighted responses was 41% Gr and 48% Id for the Malaysian respondents, 19% Gr and 68% Id for the Australian, 18% Gr and 61% Id for the British. Bochner claimed his modified TST method permits an etic comparison between countries.

2.15 WOMEN'S EMANCIPATION

The relationship between the genders was a continuum ranging from equality to domination by one gender or another according to Bonvillain (1995). The degree of equality depended on the type of society, its level of complexity, and on the strength of the ideology supporting traditional mores. In primitive foraging societies there was potential for equality where there was equal access to resources. However, when man became the hunter he took a more dominant role. In more complex societies, division of labour also led to economic specialization that emphasized gender differences, usually in favour of men. In contrast, Naisbitt and Aburdene (1990) predicted that the 1990's is the decade of women in leadership, especially in the business world. They sensed that women are 'ready to break through the "glass ceiling," the invisible barrier that has kept them from the top' (p. 96).

In South Africa out of a total estimated adult population, aged 16 years and over, 5 million men and 3 million women are in full-time employment. Working men are in the majority in all communities, especially in cities and large towns (see Figure 2.5).
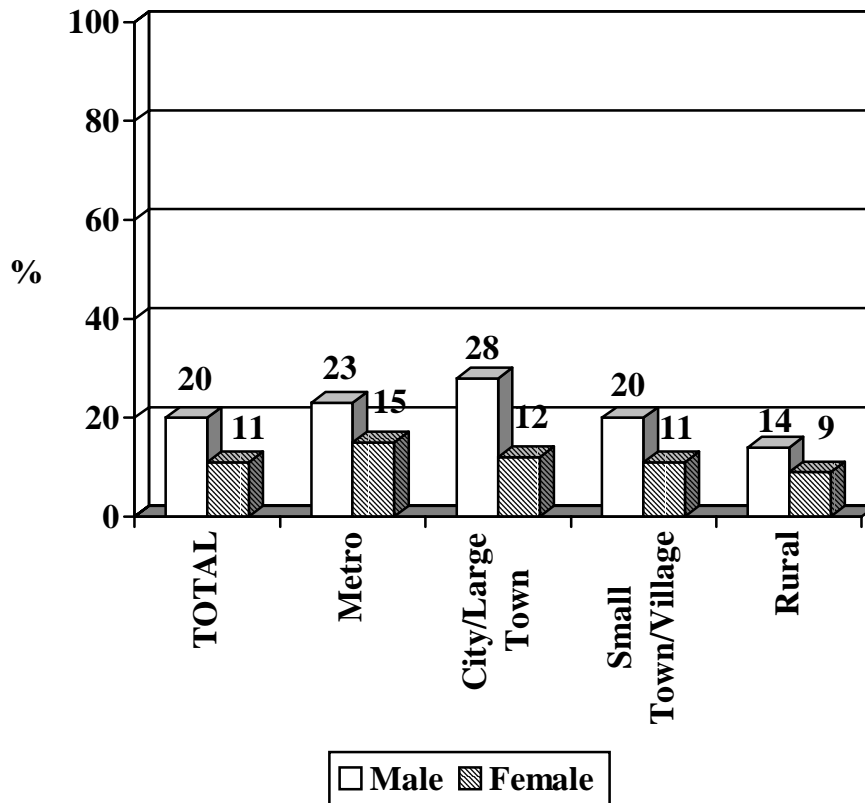
Figure 2.5 Male and female levels of employment by community size in South Africa (South African Advertising Research Foundation, 1998).

Proposition 2.28

Males are dominant economically in both urban and rural areas, though to a lesser extent in rural areas where levels of employment for both genders are low.

2.16   POSTMODERNISM

Postmodernism premises that the individual exists in a changing, multifaceted environment in which culture, history, language and society all have an influence. It is in this context that human behaviour, if it is to be fully understood, needs to be interpreted (Kvale, 1992). The modernist view that perception is based on reality, people are rational and that nature and science follow general laws has been found wanting. Einstein's theory of relativity and quantum mechanics have

disturbed previous ideas about space, time and matter (Penrose, 1994). The belief that progress is inevitable has been shattered by the 'death of the Utopias' (Kvale, 1992, p. 38). The expected benefits of modernism have not alleviated suffering (Firat & Venkatesh, 1995). The horrors and excesses apparently resulting from rationality, reason, science and technology, have led to cynicism and scepticism of the modernist status quo (Brown, 1993). There have also been doubts about the efficacy of many standardised marketing approaches and philosophies that now appear maladapted to the individuality of consumers. The narratives and metanarratives that were features of modernism and fixed the limits for behaviour and discourse in society as traditionally defined are losing their authority (Firat & Venkatesh, 1995; Keane, 1992). Narrative knowledge passed down through culture, myths, legends and traditional tales is being overtaken by science (Lyotard, 1984). This has been encouraged by the growth of capitalism manifested by greater pleasure from products and by shorter term relationships that are replacing previous permanent structures (ibid.).

Media and marketing have created a hyper-reality, where the real world exists side by side with the imaginary. The self can now be cultivated, identified and realised through the acquisition and ingestion of fragmented brand images consisting of signs and symbolic meanings, becoming in itself part of the production process. Consumption is not a destructive act, but a moment of fulfilment (Firat, 1991). The individual has become decentered; responding to the environment and its actors, rather than controlling it (Firat, 1991; Michael, 1992).

Society in the future will lack the stability of its institutions and hierarchical order, where a person has a defined position. It will consist of networks (Beer, 1991), the self a 'network of relations' (Kvale, 1992, p. 45) in a more complicated and dynamic environment (Lyotard, 1984).

Proposition 2.29
Individualists will be more attracted by the new and untried.

Proposition 2.30
Collectivists will cling to their cultural heritage, historical and social origins, and relationships within society.

2.17 COLLECTIVISM AND INDIVIDUALISM AS A DICHOTOMOUS DIMENSION

In the interpretation of the results of four studies using lists of values Schwartz (1990) came to the conclusion that it is an oversimplification to regard collectivism and individualism as a dichotomous dimension. In two of these investigations Rokeach's 36-value survey was applied, firstly to American priests and gasoline service station dealers and, secondly to Australian student activists and non-activists. In the other two studies, Schwartz' own 56-item value survey was given to extreme and moderate students at the University of Illinois, and an earlier 69-item version to political "Rightists" and other political identifications at two Helsinki Universities. In the first of the studies using the Rokeach List of Values (LOV), it was found that the American service station dealers were higher on subtypes enjoyment and achievement, as was to be expected among entrepreneurs, but lower on self-direction, a further individualistic subtype, than the priests. In the second study using LOV, non-activist Australian students were higher than activists on the collective subtypes of security and restrictive conformity, but, unexpectedly, lower on prosocial. In the survey using Schwartz' 56 item scale, among extreme and moderate Illinois students, it was found that both groups gave equal importance to the individualistic subtypes of hedonism, achievement and social power. Whereas, it had been expected that the extreme individualists would have been higher on these aspects. There was also a difference in the findings for the collectivist prosocial (universal) subtype, which was found to be more important among the extreme individualists. Rightist Finnish students also gave no greater priority to hedonism and self-direction than did students who identified with other political parties or no party.

Schwartz concluded that collectivist and individualistic values were not always opposed to each other. A viewpoint shared by Realo and Allik (1999). There were certain values that previously had been classified as collectivist which transcend parochial issues and relate to global social concerns. Though the individualism-collectivism dichotomy, or its psychological equivalent idiocentrism-allocentrism, had merit, this was an over-simplified explanation, as it did not take into account values that straddle both aspects (Schwartz, 1990).

2.18   CHAPTER SUMMARY

The major value dimension individualism versus collectivism has been described from many different viewpoints. This is a long-standing descriptor of the human condition stretching from early times to the present day. However, though likely to be universal, it is not necessarily a dichotomy. Within its parameters falls African Humanism, a philosophy of caring that is sympathetic to the individual though demanding strong loyalty to the group.

In the next chapter the second major dimension, inner- versus outer-directed, which is also hypothesised as common to humankind, will be discussed.

CHAPTER 3
INNER- VERSUS OUTER-DIRECTED

3.1 INTRODUCTION

This chapter traces the origins of the inner- versus outer-directed dimension in philosophy and psychology. Environmental factors impinging on this dimension are considered, especially with regard to changing social circumstances. Inner- and outer-directness is placed in the context of materialism, post-materialism and postmodernism. The influence of the division of labour, the workplace and society are explored.

3.2 ORIGINS OF INNER- AND OUTER-DIRECTED

3.2.1 PHILOSOPHICAL ROOTS

An early indication of inner- versus outer-directed is to be found in philosophy. Hume (1748/1951, p.3) differentiated between two types of philosophers, the one who regards 'man chiefly as born for action', the other who thinks of man as 'a reasonable rather than an active being.' This was an extension of Locke's (1690/1947) concept that reason and thoughts were not innate, but developed from the perception of the simple ideas coming from the senses. An experience which Spranger (1928/1966, p. 5) described as the 'sectional area of sensory phenomena with which socalled Nature [sic] presents each individual.'

3.2.2 PSYCHOLOGY

Jung (1912/1956) conceptualised that the normal person was outer-directed, and only looked inward when there was no gratification. Introversion was a retreat from the real world, which was evident in psychopathology, but also with normal people, though less intensely. There could however be benefits from introversion, 'one is fertilized, inspired, regenerated and reborn' (p. 380). In a world with so much taking place and with so many opportunities, Jung found it hard to

believe that a person would look inwards, unless he did not know 'how to direct his libido towards things and people, and to render them alive and beautiful.' Jung's viewpoint was interpreted by Eysenk (1953/1960, p. 23) as implying that people who are extraverted direct their 'instinctual energies' to the outer world of objects, while those who are introverted look into their 'own inner-mental states'. The essential dichotomy is between being and having. If you have nothing you are nothing, or 'celui qui n'a rien n'est rien' (Fromm, 1976/1978, p. 33). In the People's Republic of the Congo, the wearing of designer clothes by the 'lumpenproletarian' dandy was a passport to elitism, even threatening the status quo, as equality was the corollary (Friedman, 1994, p. 107). The 'magic of consumer goods' has even replaced the church as a means of realising the self in postmodern society (Kvale, 1992, p. 54). In the development of individualism, particularly in North America and Western Europe, not only was *having* synonymous with *being*, but time had become 'a commodity to be gained or lost' (Bulhan, 1985, p. 257).

Allport (1937, p. 419) remarked that extraversion and introversion had been the personality traits which had been of greatest interest to psychologists and that these terms had previously been described as 'objective mindedness' and 'subjective mindedness.' He conceptualised introverts as having a 'marked fantasy life.' When the outer world becomes detached from the inner- the condition is described as schizoid; but with extreme introversion, it is pathologically schizophrenic. However, Jung (1912/1956) regarded both extraversion and introversion as the normal reaction to a complex, the one is an escape from the complex into reality, the other a detachment from reality into the complex.

3.2.2.1 Psychological types

Jung initially ascribed 'feeling' as the predominant function of extraversion and it's opposite, 'thinking' that of introversion. This was then expanded to include two further functions 'intuition' and its opposite, 'sensation' (Sim, 1974, p. 44; Storr, 1973, p. 76). These functions, which he termed 'function-types', can be expressed diagrammatically (see Figure 3.1). Each one of these types can be found with both introversion and extraversion, which Jung termed 'general attitude

types' (Jung, 1923, p. 412).

THINKING

Empirical
Thinking

Speculative
Thinking

SENSATION

INTUITION

Emotional
Feeling

Intuitive
Feeling

FEELING
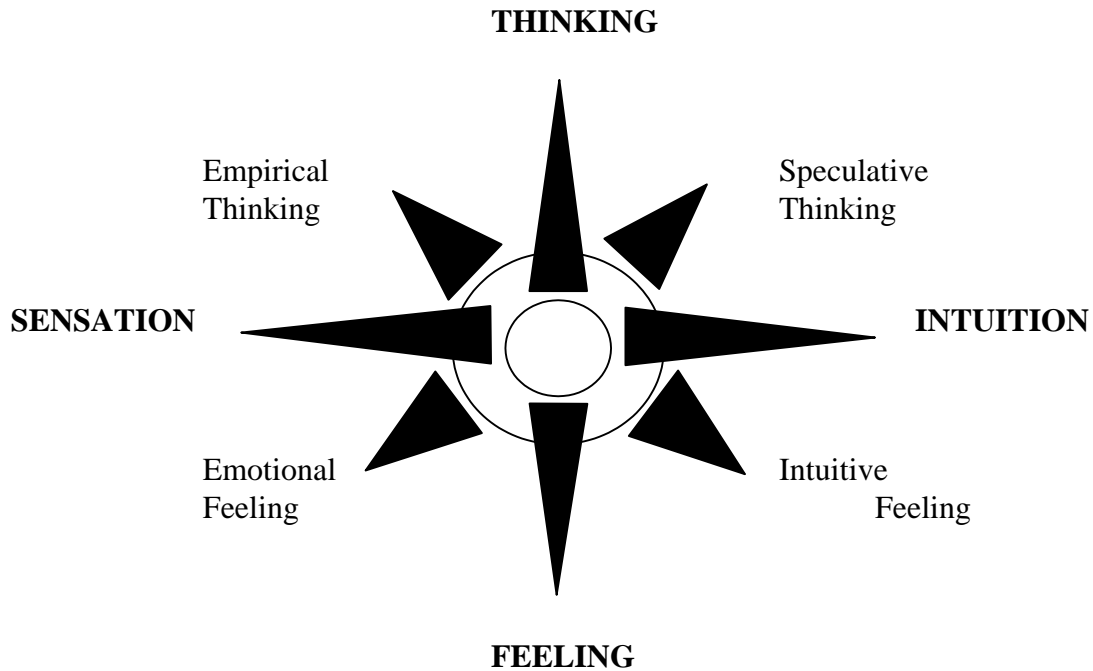
Figure 3.1. Jung's psychological types (Sim, 1974).

Bolz (1977, p. 270) was highly critical of the concept that introversion and extraversion describe psychological types, when they are 'only the extremes of a population distributed along a single trait.'

Proposition 3.1

Introversion-extraversion is a major psychological dimension that corresponds to inner- and outer-directed.

Proposition 3.2

People who are inner-directed will be more concerned with activities that require thought.

3.2.2.2 Personality types

Based on their Study of Values personality test, which was standardised on American students from predominantly liberal arts colleges, Allport, Vernon and Lindzey (1960) found a difference in the extent to which men and women could be allocated to six types. These types were derived from Spranger's (1928/1966) view that humans could be classified by the degree to which they were: Theoretical, Economic, Aesthetic, Social, Political or Religious; though it was quite possible for a person to be above or below average on more than one characteristic. The Theoretic person had a major interest in finding the truth. The Economic type was mainly concerned with usefulness, the Aesthetic in form and harmony, the Social in altruistic love. The Political type was primarily interested in power, while the Religious type's highest value was unity (Allport, 1937; Allport, Vernon & Lindzey, 1960; Spranger, 1928/1966). In a survey of 8,369 American college students of whom 5,894 were males and 2,475 were females, it was found that mean scores for males were higher for Theoretical, Economical and Political, whereas women were inclined to Aesthetic, Social and Religious (Allport, Vernon & Lindzey, 1960) (see Table 3.1).

Table 3.1
Gender differences male and female American college students

Type	N=	Total 8,369	Men 5,894	Women 2,475
Theoretical		39,8	43,1	36,5
Economic		39,5	42,1	36,9
Aesthetic		40,3	36,7	43,9
Social		39,3	37,1	41,6
Political		40,6	43,2	38,0
Religious		40,5	37,9	43,1

Proposition 3.3

Men will be more inclined to values related to practicalities and the external world, whereas women will be stronger on empathy with others, inwardness and group structures.

Proposition 3.4

Women will be more religious than men.

Proposition 3.5

Women will be more concerned than men with being in aesthetically pleasing surroundings.

"Invia vs. Exvia," or "Introversion vs. Extraversion" has been identified by Cattell et al. (1970) as a further second stratum source trait. This factor, like "Subduedness-vs.-Independence" (see 2.2.4.2 Personality and Table 2.1), was derived primarily from 5 of the 16 primary source traits of the 16 PF (pp. 16, 17, 114, 120):

    A   Sizothymia (reserved, detached, critical, aloof, stiff) vs.
             Affectothymia (outgoing, warmhearted [sic], easygoing, participating)

    E   Submissiveness (mild, easily led, docile, accommodating) vs. Dominance (assertive, aggressive, competitive, stubborn)

    F   Desurgency (sober, taciturn, serious) vs.
             Surgency (happy-go-lucky, gay, enthusiastic)

    H   Threctia (shy, timid, threat-sensitive) vs.
             Parmia (venturesome, uninhibited, socially bold)

    Q2   Group adherence (group dependent, a 'joiner' and sound follower) vs.

Self-sufficiency (self-sufficient, resourceful, prefers own decisions)

The first four of these primary source traits were positively loaded with the "Exvia vs. Invia" factor among both females and male, while Q2 had negative loadings. The "Exvia" dimension was associated with a more externally oriented, adventurous and aggressive personality (see Table 3.2).

Table 3.2
Second-stratum factor pattern matrix – Exvia-vs.-Invia by females and males*

Source Trait	Females	Males
A	85	62
E	26	41
F	66	84
H	52	78
Q2	-72	-78

* Decimal places omitted.
** Based on data from 423 male and 535 female college students.

The 16 PF has been standardised in 'at least 15 different countries' and is in use in many others (ibid., p. 9). Cattell et al. believed that the findings from these diverse countries indicated that the personality traits measured by the test were universal. Results using a new South African version were confirmatory (Prinsloo, 1995). However, it was found that Factors A and E gave weaker loadings for Blacks who were tested. This was attributed to cultural differences and 'that persons from this subgroup underwent influences of socialization in the society for long periods that had prevented them from acting participatively [sic] and assertively' (p.23). In general however there were greater differences between testees of different gender and home language groups than by race. Prinsloo stated that in his view there was 'no known psychological or other reason' why racial origin should influence a person's score on the 16 PF (p. 14).

Anastasi (1976) was critical of the assumptions underlying the 16 PF. She thought that Cattell was wrong in the supposition that factor analysis was a means of finding 'underlying causal traits' and was concerned about the reliability of factor scores using the 16 PF, since retests after a week often fell below .80. She was also disparaging of the lack of tests on normative samples, though did, however, acknowledge that more than 50 occupational groups had been tested, thus providing empirical evidence (see Cattell et al., 1970).

In order to overcome the limitation that the 16 PF had been previously applied to limited populations: mental patients, specialised populations, combinations of populations and students, Gorsuch and Cattell (1967) used a heterogeneous sample of 1,652 subjects taken from seven separate samples. The factor loadings of the two factors named "Invia-vs.-Exvia" and "Subduedness-vs.-Independence" from the combined results are shown in Table 3.3.

Table 3.3
Primary factor pattern matrix - Exvia-vs.-Invia and Independence-vs.-Subduedness*

Source Trait		FACTORS	
		Exvia (vs. Invia)	Independence (vs. Subduedness)
A	Sociable (vs. cool, aloof)	46	-23
E	Dominance (vs. Submissiveness)	44	36
F	Surgency (vs. Resurgency)	59	-
H	Adventurousness (vs. timidity)	62	-
M	Unconcerned (Autia) (vs. practical, conventional)	-	38
Q1	Radical (vs. conservative)	-	46
Q2	Self-sufficiency (vs. Group adnerence)	-34	41

* Only loadings above .20 are included. Decimal places omitted.

The factor loadings for Exvia and Independence in the work of Gorsuch and Cattell (1967) are broadly similar to those found by Cattell et al. (1970) (see loadings for Independence in Table 2.1 and for Exvia in Table 3.2), which lends support to the universality of these aspects of personality. The distribution curves for extraversion-introversion were also usually normal Murphy (1947).

Proposition 3.6

The factors underlying personality, as measured by the 16PF, are the same for all ethnic and racial groups. It would therefore be expected that inner- and outer-directed would be found among adult South Africans from all main population groups and could be a further common dimension.

Drenan (1983) contrasted values held by people with personalities distinguished by their locus of control. Values indicating 'an internal locus are self-fulfilment, self-respect, and sense of accomplishment', whereas those with an external locus would 'include warm relationships with others, security, being well respected, and sense of belonging' (pp. 236-7).

Proposition 3.7

Inward looking people would be more orientated towards values related to personal achievement, while outer-directed people would be more concerned with external and group confirmation of their worth.

In various studies on the nature of personality using factor anaylsis, Eysenk (1952, 1953/1960) also detected a bi-polar dimension, which he termed "introversion-extraversion". Like Jung, he identified extreme extraversion with hysteria and introversion with what he called 'dysthymic', in place of 'psychasthenia' (Eysenk, 1952, p. 109). The latter condition would be accompanied by 'anxiety and reactive depression' (Eysenk, 1953/1960, p. 109). A feature of extraverts was that they had much lower levels of aspiration than introverts (Eysenk, 1952), a similar conclusion to that of Drenan (1983).

Eysenk's results indicated that there were two dimensions of abnormality, which were orthogonal to each other. For example, he applied a 12 question personality inventory to a quota sample of 1,600 men and women, of which the first six statements were measures of neuroticism and the next six of extraversion, It was hypothesised that extraversion and neuroticism would be independent of each other. The loadings on a 2 factor solution provide support for this contention (Eysenk, 1953/1960) (see Table 3.4).

Table 3.4

Factor pattern matrix - Extraversion and Neuroticism

Statements	FACTOR LOADINGS	
	Extraversion	Neuroticism
1 N	.01	.75
2 N	-.06	.74
3 N	-.09	.71
4 N	.02	.58
5 N	-.06	.58
6 N	.09	.63
7 E	.48	.00
8 E	.59	.04
9 E	.59	-.06
10 E	.49	-.04
11 E	.68	-.02
12 E	.64	.09

N = Neuroticism. E = Extraversion.

Eysenk (1970), building on the work of Pavlov (n.d., 1957, 1927/1960), hypothesised that introverts are more likely to respond to stimulation of the senses than extraverts, as they are in a state of greater sensory arousal. Numerous conditioning experiments among subjects, whose extraversion/introversion was also measured, were in favour of this hypothesis.

Proposition 3.8

People who are inner-directed will be more likely to engage in activities that use all of the senses than those who are outer-directed.

3.2.3   ENVIRONMENTAL FACTORS

Further evidence of the importance of the inward and outward dimension comes from Sorokin's (1937/1962) extensive investigation of changing social circumstances throughout world history. Sorokin (ibid., Vol. I, pp. 72-80) divided cultural systems into two broad divisions, "Ideational", which was concerned with inner- experience, and "Sensate", which looked outward for reality. In its most extreme form, the Ideational mentality divorced itself from the outside world and focused on internal experience, the principle of "Being", or Stoicism, becoming the prime objective of existence. In contrast, the Sensate, or Epicurean, mentality concentrated on the principle of "Becoming" through the maximum satisfaction of mainly physical needs. Reality was what the senses perceive externally and actualisation came from changing and exploiting the outside world. There are sub-categories of these main types and a number of mixed intermediaries between the two extremes.

Through a detailed study of architecture, biographies, ethics, law, literature, music, paintings, portraiture, scientific development, sculpture, social relationships, war and revolution, Sorokin (ibid., Vols. I, II & III) showed how the dominant culture of the times alternated between Ideational and Sensate. Economic and scientific progress was at its height when the outward Sensate culture, which was in favour of tradition, was dominant, though no one system existed to the total exclusion of the other. Conceptually the proportions of different systems would vary both within and between individuals. Each person would have an 'integrated system of culture' (ibid., Vol. IV, p. 101.) but many different traits. Sorokin argued that if the individual could vary in this way, then the culture of a geographical area, however small must also vary. The individual would, however, be responding according to the major cultural milieu of the times.

McLuhan (1962), cited in Zetterberg (1996a), noted the relationship between the dominant medium at the time and the strength of Ideational and Sensate culture, as evaluated by Sorokin. (see Figure 3.2).
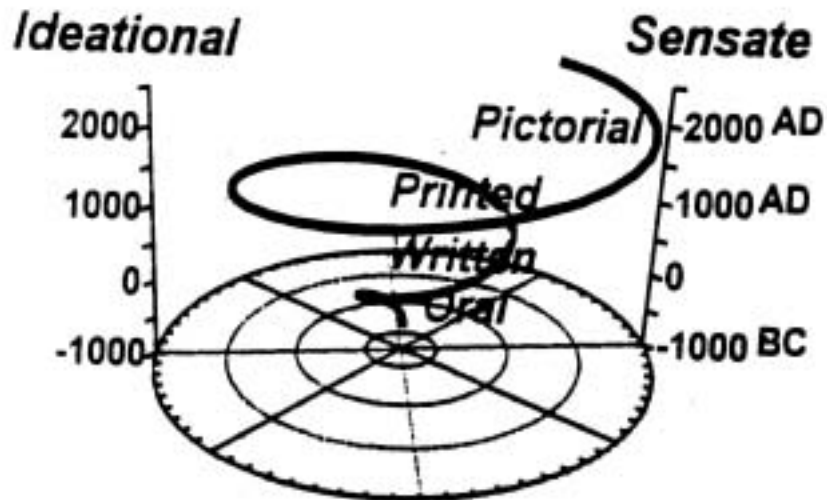
Figure 3.2. Relationship between media and culture (Zetterberg, 1996a).

Symbols were conveyed orally before Plato, then written until the printing press was discovered leading to a rapid expansion of knowledge and the consequent economic and scientific progress. More recently, symbols are transmitted through the visual media of cinema and television, which are softer and less likely to stimulate outward activity than the masculinity and harshness of print. Action is shaped and controlled by media, that is why 'the medium is the message' (McLuhan, 1964, p. 9). The drastic disintegration of Sensate culture and subsequent loss of Western values and economic decline, predicted before the second World War by Sorokin (1937/1962. Vol. IV), would be hastened by the dominance of electronic media and the decline of print. Postman (1986) has already drawn attention to the threats posed to culture and independent thought by society's growing acceptance of television at the expense of typography.

It should be noted that in South Africa print's share of advertising expenditure in main media has been declining (Market Research Africa, 1990-1999) (see Table 3.5).

Table 3.5

Comparison of "Adspend" for print, radio and television 1990 to 1999 (Rand milllions)

Year	Print	Radio	TV	Total	Print's Share %
1990	1039	212	612	1863	55.8
1992	1413	351	1030	2794	50.5
1994	1724	524	1549	3797	49.5
1996	2339	658	1958	4954	47.3
1997	2760	725	2398	5883	46.9
1998	3167	795	2938	6900	45.9
1999	3432	928	3275	7625	44.9

In a study conducted in 1996, on a sample of 505 South African urban adults with high school education, it was found that one person in every four (25%) had not read a book, magazine, newspaper, or report in the last 7 days (Print Media Association, 1997). These people can be considered to be aliterate, that is, they can read but choose not to do so. The incidence of aliterates was higher among those with low levels of education and income. It also tended to be higher among women than men. Indians had the lowest incidence of aliterates and Blacks the highest (see Corder, 2000a & Figure 3.3).
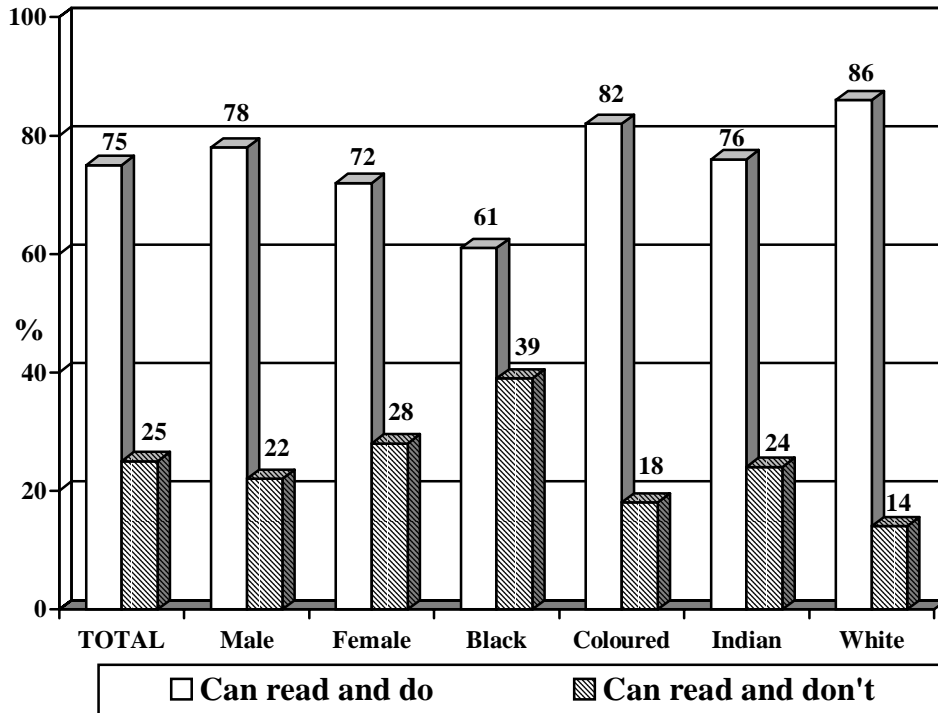
Figure 3.3. Incidence of aliterates (Can read and don't) by gender and race among South African urban adults with high school education (Print Media Association, 1997).

In reference to Africans living in rural areas, Carothers (1953) asserted that their 'education, using the latter word in its broadest sense, is verbal, musical, dramatic; and the African lives largely in the world of sound, in contrast to the European, who lives largely in the world of sight' (p. 103). Africans are brought up in a self-contained cultural framework with a broad knowledge, which leads to a more holistic view of the world. Auditory abilities are finely developed. European education, on the other hand, places more emphasis on the development of causal, spatial and temporal relationships and on social independence. It should be noted that Carothers work has been rejected by Fanon (1964/1967b) and criticised as being racist (Bulhan, 1977).

Proposition 3.9

Blacks and females are more likely to be outer-directed where education and income are lower and there is more use of electronic rather than print media. Conversely Whites and males are more likely to be inner-directed where print will be stronger than electronic.

Proposition 3.10

Blacks are more likely to be outer-directed where music will relate to group activities, such as church and tribe.

3.2.4   DIVISION OF LABOUR

Women in traditional society, Bonvillain (1995) noticed, were assigned responsibility for looking after infants, children, the disabled and elderly. Their reproductive role and household responsibilities limited their opportunities for work that was not home based. It was the males who were engaged in activities such as hunting and trading that required them to be away, sometimes for long periods. The advent of colonisation by Europeans, who preferred to trade with males, further weakened the economic role of women and restricted their autonomy. However in the United States, women's success in paid work has led to calls for equality, both in the workplace and in the home environment (pp. 273-275). Naisbitt and Aburdene (1990, p.217) have drawn attention to the success that women have had in the 'information society', even in a country like Japan, with its strong traditional culture.

Proposition 3.11

Women are more likely to be inward looking, especially where there are infants, young children and older people living in a household. Males are more likely to be outward looking.

3.2.5 MATERIALISM AND POST-MATERIALISM

A detailed international study of two dimensions of social change termed "Materialism" and "Post-materialism" was made by Inglehart (1977, 1990). In excess of 190,000 interviews were done over 18 years in six European countries: Belgium, Great Britain, France, Italy, the Netherlands and West Germany (Ingelhart, 1990).

Representative samples of those over 15 years of age from each country were asked:

> If you had to choose among the following things, which are the two that seem most desirable to you? (Ingelhart, 1977, p. 28).

- Maintaining order in the nation
- Giving the people more say in important political decisions
- Fighting rising prices
- Protecting freedom of speech

The first and third items were regarded as manifestations of Materialism, while the second and fourth were indicative of Post-materialism. Inglehart argued that the circumstances prevailing in a country when a person was growing up would condition the degree of support for one or other of these values in latter life. Among the present generation, improved economic conditions, higher standards of education, the influence of mass media and lack of personal experience of war, would all tend to increase the likelihood of subscribing to Post-materialistic values. It would therefore be expected that Britain that had been comparatively well off prior to World War II and subsequently had achieved limited economic growth would have a small range of values between younger and older age cohorts. The reverse would be true of Germany, which was less well off before the war, had suffered extensive damage during it, but subsequently experienced strong economic recovery. Research findings in six European countries in 1970 and five in 1971 supported this view, with the narrowest differences being found in Britain and the greatest in Germany, with other countries holding an intermediary position. The relevance of materialism

and post-materialism to the inner- and outer-directed dimensions will be indicated in the following paragraphs.

3.2.6   INNER- AND OUTER-DIRECTED IN SOCIETY AND THE WORKPLACE

A connection between population and societal direction was postulated by Riesman (1978). In societies with high birth and death rates people were "tradition-directed". Under such conditions there was a high population growth potential through many factors acting together, such as: a decline in infanticide and tribal violence, improved sanitation, an increase in agricultural yields and better transport systems to move surpluses from one area to another. These changes led to a rapid expansion in mobility, people and production, disturbing the pattern of life. The social character became "inner-directed," unlike the traditional society where everyone knew their place, the rapidly changing environment required 'a rigid though highly individualized character' (p. 15). When the birth rate drops the population levels off, or even declines, resulting in a surplus of commodities and leisure time, as production of goods and services is in excess of demand. Under these circumstances people become "other-directed" seeking approval from, and being influenced, by their peers, rather than their ancestors (p. 22). The tradition-directed person responds to a 'cultural monotone', whereas the other-directed is in touch with cues coming from many directions, both near and far (p. 25).

Herzberg, Mausner and Snyderman (1959) remarked that self-actualization is a major aspect of personality and that when this occurs in the workplace it leads to positive attitudes towards a job. In contrast, in primitive society work is performed through the exercise of physical labour and is essentially a means of satisfying basic biological needs. With industrialisation, machines rather than muscle became the source of power; repetition and uniformity became the norm, leaving the worker with limited say in the outcome of his/her efforts.

Rostow (1960/1971) conjectured that a stage of economic growth could be reached where 'diminishing marginal utility sets in' with a resultant 'fall into secular spiritual stagnation' (p. 91) and an increase in focus on inner-values. In an affluent society, where there was a decline in the

need for goods, less effort and time would be devoted to work (Galbraith, 1958/1971). In the United States, between 1850 and 1950, it was estimated that the working week had been reduced from 70 to 40 hours. Similarly, in Sweden, a country with extensive free social services, there has been a reduction in the need to increase work output (Zetterberg, 1996b).

Proposition 3.12
Outer-directed people will seek approval from others.

The American economist Veblen (1899/1970), writing before the turn of the century, originated the concepts of "Conspicuous Consumption" and "Conspicuous Leisure". He argued that as society developed through savagery, barbarianism and beyond, a class emerged who were not dependent on toil for their income. This "Leisure Class" devoted extensive energy in demonstrating its 'pecuniary standing' through the adherence to fashion, overt waste of time, and demonstration of its culture, taste, wealth and sophistication (p. 119). Other classes, which had to work for a living, frequently by manual labour, desired to emulate this example, which they regarded as the embodiment of success. In China the binding of feet of young girls was a form of class differentiation, as only the wealthy could afford to be carried. Clothing was also a means of demonstrating class. National dress was the costume for country people, whereas in town clothing indicated rank (Tönnies, 1961).

A "New Class" of people who had freed themselves from manual labour was growing in numbers in the United States. Work satisfaction and prestige were prime motivations for this class, rather than financial reward (Galbraith, 1958/1971, p. 275). The vying for political position among the less well-educated was a manifestation of the strong desire to move into this élite group which, for the most part, was typified by educational qualifications.

Hofstede (1994) distinguished between intrinsic qualities of a job, which was the nature of the work itself, and extrinsic qualities that related to material rewards and working conditions. In comparing results by occupation in 53 countries and regions, he found that those in positions where high levels of education were required tended to place a greater priority on the intrinsic qualities of work. In contrast, those in jobs that could be filled by people with lower educational standards chose extrinsic aspects.

Proposition 3.13

Outer-directed people and those with mundane occupations will want to enhance their status by the acquisition of conspicuous consumer goods, even if they have to buy on credit.

Proposition 3.14

Outer-directed people use clothing to demonstrate success.

Proposition 3.15

Having a meaningful occupation will be more relevant to inner-directed people and those with a good level of education, than will financial reimbursement.

Inglehart (1977) has shown how people with varying degrees of Materialism and Post-materialism hold differing attitudes to job goals (see Figure 3.4). Monetary considerations and security are replaced by a sense of accomplishment and likeable working companions as the adherence to Materialism declines in favour of Post-materialism.
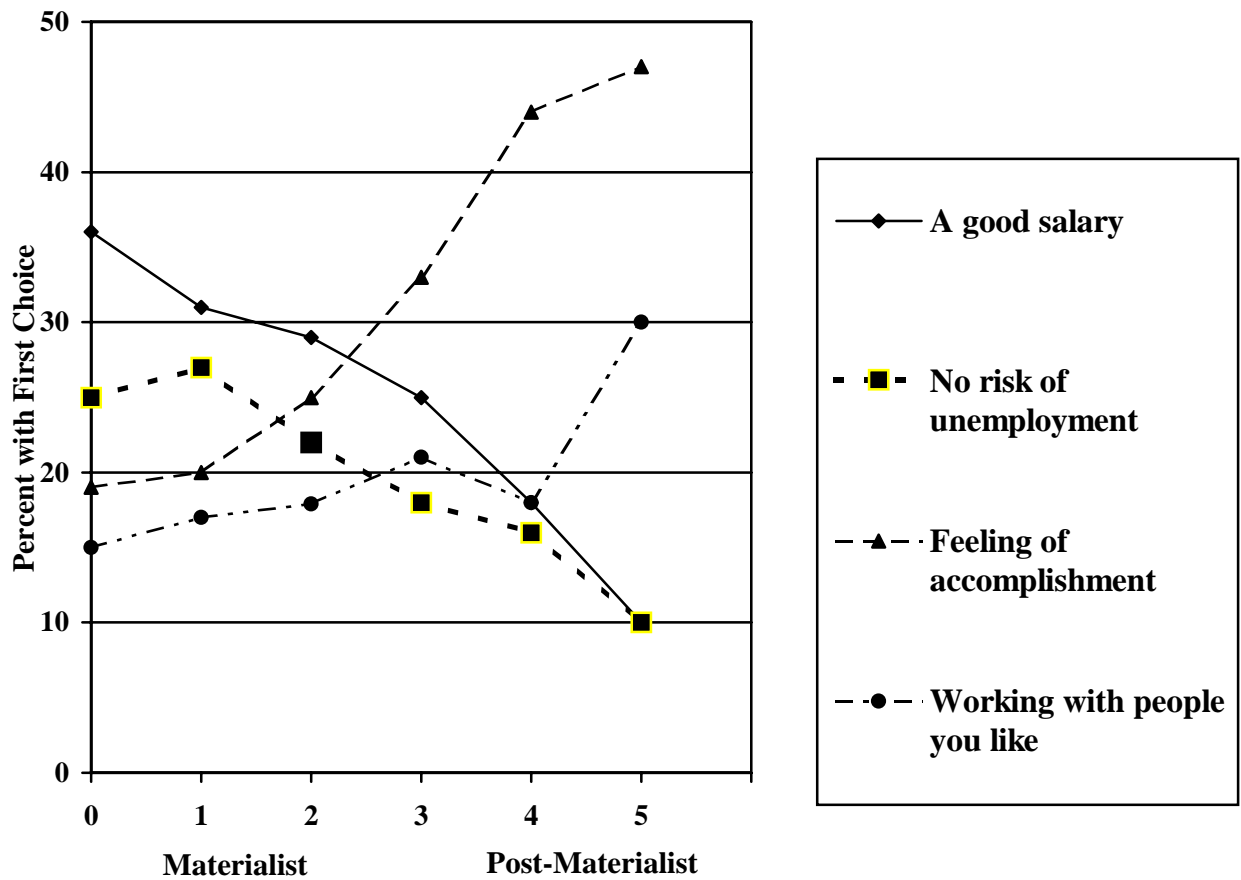
Figure 3.4. Job goals by value type (Ingelhart, 1977).

Proposition 3.16

It is to be expected that people who are outer-directed would be more likely to seek financial reward and job protection, while those who are inner- directed would want less tangible objectives in the form of personal satisfaction and relationships.

Hellevik (1993) applied Ingelhart's 4-item value indicator to the Norwegian population. He found, as predicted by the underlying theory, that younger people who had been raised in a far more affluent society than their parents, were more inclined to Post-materialism, as were those with higher education. However in view of the 'dramatic increase in the standard of living in Norway over the time span separating these cohorts', he concluded that the influence on 'the

socialization process is very weak indeed'. This called into question the assumption that there was a relationship between affluence and Post-materialism. Hellevik advocated the measurement of 'the widest spectrum of cultural components' (pp. 213-215). The cultural space of Norway, based on representative samples of just under 3,000 and the measurement of 40 value indexes, showed how the two major dimensions were Outer- versus Inner-oriented and Change versus Stability-oriented (see Figure 3.5). These dimensions have also been termed Materialist versus Idealist and Modern versus Traditional.

```
                    CHANGE ORIENTED
                        (Modern)
                          |
                    Risk-taking
                    Spontaneity
                    New Technology



OUTER-ORIENTED   Appearance            Self-realization   INNER-ORIENTED
  (Materialist)       Egoism              Altruism           (Idealist)
                 Status                Environment



                    Traditions
                    Security
                    Law abiding
                          |
                    STABILITY ORIENTED
                        (Traditional)
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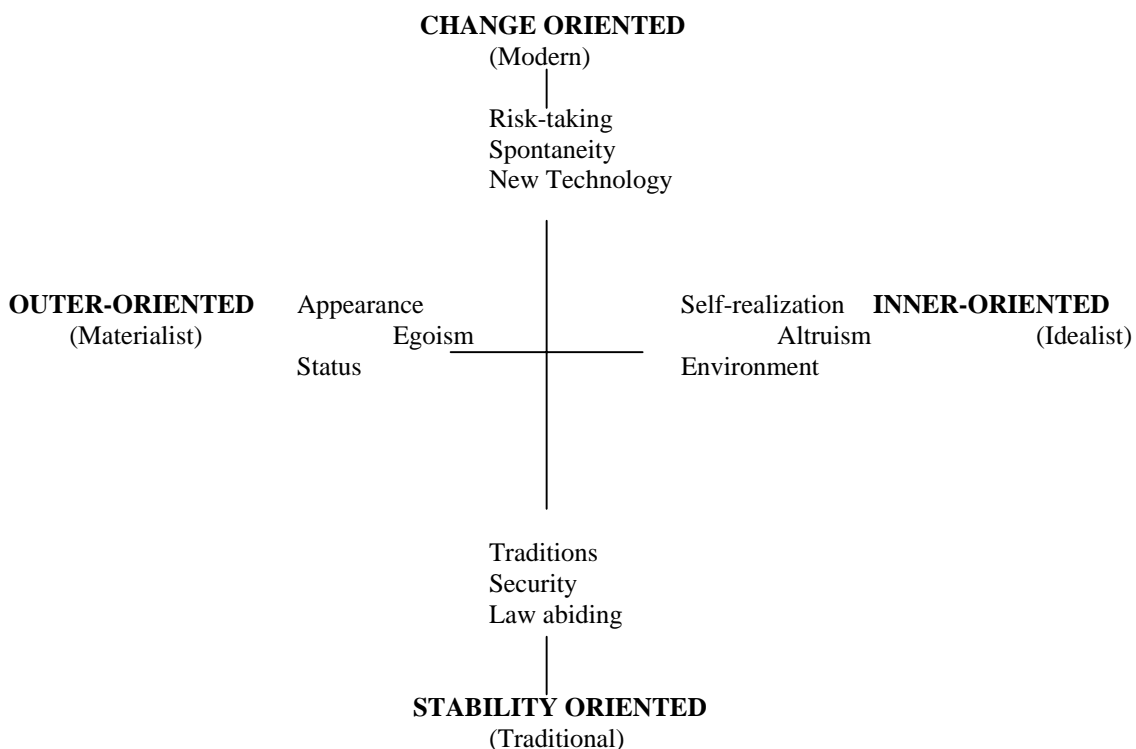
Figure 3.5. The two dimensional cultural space of Norway (Hellevik, 1993).

There is a similarity in the dimensions found in Norway and those in the theoretical model proposed by Schwartz (see Figure 1.1). This lends support to the contention of Schwartz and Bilsky that there is a universal structure of values (Schwartz, 1992; Schwartz & Bilsky, 1987, 1990). In both cases conformity and conservatism are tantamount to security, and contrary to change.

Proposition 3.17

The dimensions of individualism versus collectivism and inner- versus outer-directed are likely to be orthogonal.

Proposition 3.18

Collectivists are concerned with security and the maintenance of the status quo, whereas individualists embrace change.

It could be expected that there would be a relationship between disposable income and the extent to which a person needs to look outward for their requirements. The disposable income of Whites in South Africa has been declining in favour of Blacks, but in terms of per capita population it is far greater than that of other racial groups (see Figure 3.6). Whites with a higher disposable income and more financial security can afford to be inward looking. Whereas Blacks have to be more concerned with the external world from which they gain the wherewithal to survive.
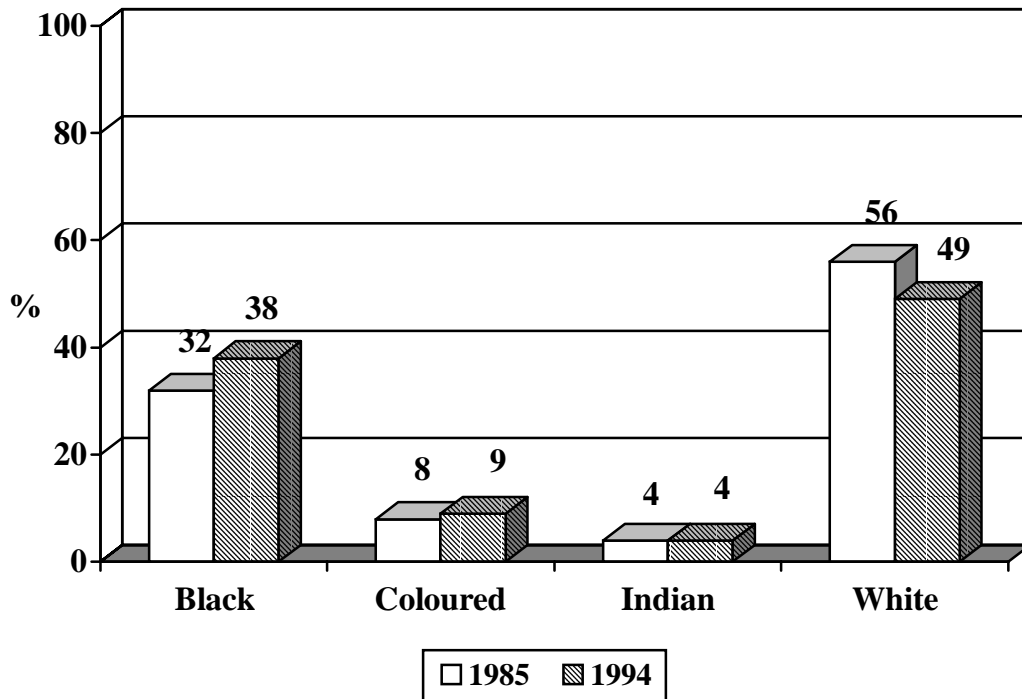
Figure 3.6. Personal disposable income 1985 and 1994 by race (South African Institute of Race Relations, 1997).

Proposition 3.19

In view of their higher personal disposable income, a greater proportion of Whites than Blacks will be inward looking.

3.3   CHAPTER SUMMARY

In Chapter 3 the second value dimension inner- versus outer-directed has been outlined. Though given less attention in the literature than collectivism and individualism, it is still a major discriminator common to humankind. Inner- versus outer-directed is likely to be of considerable relevance to South African society, especially in view of the wide variation in education and living standard.

In Chapter 4 the nature of values and the ways in which they are measured are delineated.

CHAPTER 4
VALUES AND THEIR MEASUREMENT

4.1   INTRODUCTION

In Chapters 2 and 3 the two major dimensions of individualism versus collectivism and inner-versus outer-directed have been described. The nature of individual values, which it is argued form the basis for these dimensions, is outlined in this chapter. There are numerous ways in which values can be measured. Three well-known procedures have been summarised, the Rokeach Value Survey (RVS), VALS (Values and Lifestyle) and a simplified version List of Values (LOV). A three dimensional method developed by Zetterberg (1996a) for use in Sweden is outlined, as well as a technique using laddering to link values, means and products.

4.2   THE NATURE OF VALUES

Values have been described as 'intrinsic requiredness' (Köhler, 1938b, p. 31) which were 'at the bottom of all human activities' (p. 35). Together with norms they were essential for man's survival (Fromm, 1956).

There is a multiplicity of concepts regarding values and no commonly accepted definition. Köhler (1938b) remarked on the variety of viewpoints of values among philosophers and Joubert (1992) described twenty-five notions of values related just to sociology, the earliest being from Thomas and Znaniecke's study 'The Polish peasant in Europe and America', originally published in 1918. Thomas and Znaniecke (1918/1927) believed that changes in social reality were a direct result of social values that existed previously. Social values were reactions to social elements that could include physical objects, 'a foodstuff, an instrument, a coin, a piece of poetry, a university, a myth, a scientific theory' (p. 21). Objects might have a sensual, or imaginary meaning, or a combination of both, when involved with human activity. Attitudes were related to values through activity, as they were considerations of actual or possible action. This understanding of attitudes and values has been criticised by Joubert (1992) as being too vague to be useful.

Jung (1959a, p. 28-29) differentiated between *subjective* 'feeling-value' judgements which, in addition to intellectual judgements, were necessary in understanding psychic content and '*objective* values which are founded on a *consensus omnium* – moral, aesthetic and religious values' that are 'universally recognised ideals' (p. 29).

Values have also been defined as deep-seated motivations instilled from culture and nurture that determine a person's behaviour. They are much deeper than opinions, which can be easily influenced by current debate, far more strongly held, and less malleable than attitudes (Worcester, 1996). Values have been considered as ideals, independent of situations (Braithwaite, 1998) and conceived as 'the feeling of which the attitude is the conditioned verbal expression' (Murphy, 1947, p. 285). Attention has been drawn to the difference between personal values, which relate to the social environment, and learned cultural values, which determine what is right and wrong; though there is some overlap between the two (Groenewald, 1996). It has been suggested that there has been a shift in the notion of values from the worth of things to conceptions of what is desirable for the well-being of society' (Joubert, 1992, p. 49). It has further been proposed that values, whose origins 'can be traced to culture, society and its institutions, and personality', are small in number, are to be found universally, but to different degrees (Rokeach, 1973, p. 3). In support of the universality of values Schwartz and Sagiv (1995, p. 94) reasoned that they were cognisant objectives of 'biological needs, …social interaction, and demands of group functioning.'

Zetterberg (1996a) concluded that values are the fundamental force that drives markets. They indicate how people wish to live and can be expressed in the market place. They have diagnostic qualities within a socio-cultural framework, especially for longer term planning. In addition, values must be understood in order to have effective marketing tactics and strategy (Browne, 1998). They are particularly important in media selection, in order to obtain the optimum results from promotion and to maintain brand loyalty (ibid.). Sampson (1992) has been sceptical of the relevance of values in marketing, as they are too general to relate to the particulars of consumer behaviour. The specifics of a situation have been found to be usually more predictive than values

by Lutz (1991). In contrast, Sinclair (1997) has drawn attention to the increase in emphasis being placed on personal values by marketing theorists. Knowledge of values makes it possible, not only to understand why consumers behave in certain ways, but also to predict media and product usage.

Reinforcement for this view came from a survey among 498 families in Los Angeles County, out of a contact sample of 1,605, who returned a mailed self-administered questionnaire. The aim of this investigation was not only to understand why consumers behave in certain ways, but also to predict media and product usage. The results showed a relationship between the cultural values of 'man's relation to nature', 'time dimension', 'personal activity' and 'man's relation to others' and the number and types of vehicles owned by the family. Ownership of sport cars was found to be higher with those who had a harmonious relationship with the environment, were inclined to tradition and self-fulfilment (Henry, 1976, pp. 122-125).

Rokeach (1980) has noted that values change slowly. In a study of 104 students at a Presbyterian college, done in 1950 and repeated in 1956, Rokeach found that the rank order of the importance of six values remained very consistent (see Table 4.1).

Table 4.1
Rank order of importance of six values

	1950	1956
Religious	1	1
Social	2	2.5
Political	3	2.5
Economic	4	5
Theoretical	5	4
Esthetic	6	6

Values do however change. For instance, Dichter (1964) perceived the erosion of the traditional American values of hard work and saving, in favour of leisure, the causes of which he felt were improvements in industrialisation and automation. In Sweden, Zetterberg (1980) also noted how the meaning and value of work has been evolving. An increase in paid work, at the expense of self-subsistence and entrepreneurship, has led to politicians dispensing social welfare, as many people now lack employment. In 1960, 13 percent of household income came from transfer payments from public funds, by 1979 it had risen to 33 percent. This inevitably affected people's work goals and values.

Durgee, O'Connor and Veryzer (1996) reckoned that the use of values in advertising products was successful in gaining brand registration, trial and regular usage, because consumers appreciated the benefits to them. Osgood (1967), who in conjunction with Succi and Tannenbaum developed the semantic differential as a means of evaluating attitudes (Osgood, Succi & Tannenbaum, 1957), has commented on the difficulties of comparing values from different cultures, because they are nonmaterial. Despite this, he recognised the need to test hypotheses about the nature of human beings in different cultures and language groups.

The view has been expressed that values are always changing, but that certain core values are more constant (Engel, Blackwell & Miniard, 1995). Two ways of predicting future values were propounded, as people grow older they adapt the values of their elders; alternatively they retain their present values (ibid.). Ingelhart (1977) was inclined to this latter view. The reality is more likely to be somewhere between the two.

Proposition 4.1
Values change slowly. They therefore do not need to be measured frequently.

4.2.1   ROKEACH VALUE SURVEY (RVS)

Rokeach (1973) conceptualised two sets of beliefs, which he termed instrumental and terminal values. Instrumental values were beliefs 'concerning desirable *modes of conduct*', while terminal

values were 'desirable *end states of existence*' (pp. 7-8). Instrumental values were subdivided into *moral values* that were mainly interpersonal modes of behaviour and *competence values* that had a personal focus and related to self-actualisation. Terminal values were also subdivided into personal values linked to the self and social values that centred on society and interpersonal relationships.

A feature of Rokeach's theory is that everyone has his or her own value system determined by the hierarchies of that person's instrumental and terminal values. Value priorities are used in making decisions and influence behaviour (Kamakura & Novak, 1992; Rokeach, 1973).

Rokeach estimated that a person would have 18 terminal values and 'perhaps five or six dozen' instrumental values (ibid., p. 11). The number would be particularly related to needs and 'the learned beliefs concerning desirable modes of conduct and end-states of existence...' (p. 18).

Two lists of 18 instrumental and 18 terminal values were developed by Rokeach, which together have been called the Rokeach Value Survey (RVS). Respondents are invited to put the values on each list in order of importance, a task that informants report they have considerable difficulty in completing and one which creates doubts about their own reliability. Results provide a ranking, rather than an absolute measure. In defence of this approach, Rokeach and Ball-Rokeach (1989) reasoned that it was preferable for people to engage in 'cognitively driven paired comparisons over a lifetime rather than a mental process of simply assessing the importance of each value in absolute terms in isolation from each other' (p. 775). Weaknesses in this contention are the assumptions that values can be expressed in single statements, which are equivalent in terms of valency, and that ranking of 18 items is similar to paired comparisons.

The 18 instrumental values were chosen from lists of trait-names, while the 18 terminal values came from a number of sources, including research among 30 psychology graduate students, interviews with 100 representative adults in metropolitan Lansing, the state capital of Michigan, and Rokeach's own personal values. Rokeach himself described the selection of the items on the lists as 'intuitive' (Rokeach, 1973, p. 30). A limit of 18 was set, because the values covered were

considered to be 'reasonably comprehensive' and 'it was felt to be too burdensome for respondents to rank more than 18 values' (p. 29).

RVS was tested on an area probability sample of 1,409 adult Americans over the age of 21 in April 1968 (Rokeach, 1973). It might have been expected that there would have been marked differences between the rank orders for Black and White Americans, if cultural, educational and income differences were to be taken into account. This was not the case. Only a minority of values were significantly different (see Tables 4.2 & 4.3). The median rank order of both terminal and instrumental values was very similar for the majority of values ranked. Greater differences were found for men and women, people from religious groups, those with different income and educational standards, than between Blacks and Whites.

Table 4.2
Terminal value medians and composite rank orders for White and Black Americans - 1968
(N = 1,397)

Value	N =	White 1,195	Black 202	p
A comfortable life		9.6 (12)	6.6 (5)	.001
An exciting life		15.4 (18)	15.3 (18)	-
A sense of accomplishment		8.8 (8)	10.2 (11)	.01
A world at peace		3.3 (1)	3.5 (1)	-
A world of beauty		13.5 (15)	14.1 (16)	-
Equality		9.6 (11)	4.6 (2)	.001
Family security		3.6 (2)	5.1 (4)	.001
Freedom		5.6 (3)	5.0 (3)	-
Happiness		7.6 (4)	7.6 (7)	-
Inner-harmony		10.4 (13)	10.9 (12)	-
Mature love		12.1 (14)	13.7 (14)	.001
National security		9.1 (9)	11.4 (13)	.001
Pleasure		14.7 (17)	14.3 (17)	-
Salvation		8.5 (7)	9.4 (9)	-
Self-respect		7.7 (5)	7.5 (6)	-
Social recognition		14.6 (16)	13.7 (15)	.05
True friendship		9.3 (10)	9.8 (10)	-
Wisdom		7.9 (6)	8.5 (8)	

Figures shown are median rankings and, in parenthesis, composite rank orders.

Table 4.3

Instrumental value medians and composite rank orders for White and Black Americans – 1968 (N = 1, 397)

Value	N =	White 1,195	Black 202	*p*
Ambitious		6.7 (3)	5.2 (2)	.01
Broadminded		7.4 (5)	8.0 (8)	-
Capable		9.4 (10)	10.4 (13)	-
Cheerful		9.9 (12)	10.3 (12)	-
Clean		9.3 (8)	5.3 (3)	.001
Courageous		7.8 (6)	7.8 (7)	-
Forgiving		7.0 (4)	7.6 (5)	-
Helpful		8.3 (7)	7.8 (6)	-
Honest		3.2 (1)	3.8 (1)	-
Imaginative		15.3 (18)	15.8 (18)	-
Independent		10.6 (13)	10.2 (10)	-
Intellectual		13.1 (15)	12.6 (16)	-
Logical		13.9 (17)	15.1 (17)	.01
Loving		9.4 (9)	12.6 (15)	.001
Obedient		13.5 (16)	11.5 (14)	.01
Polite		10.9 (14)	10.2 (11)	-
Responsible		6.6 (2)	7.6 (4)	.05
Self-controlled		9.5 (11)	10.1 (9)	-

Figures shown are median rankings and, in parenthesis, composite rank orders.

Proposition 4.2

The close similarities found for the value priorities of American Blacks and Whites suggest that the values and underlying value systems of South African Blacks and Whites would also be similar.

Results based on the RVS have demonstrated that values have a very high degree of stability over time. In 1971, 1974 and 1981 the terminal values of American adults were measured on national samples. A comparison of terminal values for these years with the findings for the 1968 survey showed that average rankings for most terminal values remained fairly consistent, especially for the top and bottom values (Rokeach & Ball-Rokeach, 1989) (see Table 4.4). These findings

support the view that values are deep-seated and enduring. Rokeach and Ball-Rokeach believed that both individuals and whole societies could be compared through the use of values (ibid.). This was disputed by Hofstede and Bond (1984) who cautioned that the RVS was developed in the United States and comparisons of results from its use in other countries is a 'debatable form of cross-cultural research' (p. 421).

Table 4.4
Average rankings of 18 terminal values by four national samples of Americans

Value	N =	1968 1,409	1971 1,430	1974 933	1981 933
A world at peace		1	1	2	2
Family security		2	2	1	1
Freedom		3	3	3	3
Happiness		4	6	5	5
Self-respect		5	5	4	4
Wisdom		6	7	6	6
Equality		7	4	12	12
Salvation		8	9	10	9
Comfortable life		9	13	8	8
Sense accomplishment		10	11	7	7
True friendship		11	10	9	10
National security		12	8	13	11
Inner-harmony		13	12	11	13
Mature love		14	14	14	14
World of beauty		15	15	15	16
Social recognition		16	17	18	18
Pleasure		17	16	16	17
Exciting life		18	18	17	15

Proposition 4.3

Values are deep-seated and lasting.

Despite Hofstede and Bond's (1984) cautionary advice, Burgess (1990) applied the Rokeach Value Survey to urban South Africans using personal interviews. The questionnaire, for budget reasons, was administered only in Afrikaans and English, though Black interviewers provided explanations in the vernacular, if required. A sample of 603 Whites (42.9%), 402 Blacks (28.6%),

200 Coloureds (14.2%) and 200 Asians (14.2) making a total of 1,405 was taken. Burgess found that 'urban South Africans place similar relative importance on personal values' (p. 236) (see Table 4.5)

Table 4.5
Relative importance of terminal personal values (rankings of median rankings)

Terminal Value N=	White 603	Black 402	Coloured 200	Asian 200
A comfortable life	10	1	11	3
An exciting life	15	9	16	13
A sense of accomplishment	11	16	12	11
A world at peace	7	4	10	4
A world of beauty	14	14	15	15
Equality	18	8	7	9
Family security	1	5	1	1
Freedom	12	7	8	8
Happiness	5	2	2	2
Inner- harmony	8	15	9	10
Mature love	9	12	13	14
National security	13	17	18	17
Pleasure	16	10	17	16
Salvation	4	18	6	18
Self-respect	3	6	4	6
Social recognition	17	13	14	12
True friendship	6	3	5	5
Wisdom	2	11	3	7

Blacks assigned more importance to 'a comfortable life', 'an exciting life', 'pleasure', and 'true friendship' than other racial groups. They placed less importance on 'a sense of accomplishment', 'family security', 'inner- harmony', 'salvation' and 'wisdom.' There was considerable concordance in the terminal value priorities of Coloureds and Asians. Whites were less similar to Blacks than they were to Asians and Coloureds.

4.2.2   VALS (VALUES AND LIFESTYLES)

A different approach to the classification of people is to use a combination of values, lifestyles and demographics. The VALS (Values and Lifestyle) method was developed by a consulting firm SRI International (Mitchell, 1979, 1981). It was incorporated into the Simmonds Study in 1982, the results of which indicated that media usage differed markedly among the different VALS segments (Richard, 1984). The theory behind VALS was that people have inner-values which 'create matching patterns of outer behaviour, otherwise known as "lifestyle"' (Mitchell, 1981, p. 4). The major influence behind VALS was the hierarchy of human needs propounded by Maslow (1954). A comparison of the Maslow and VALS schemes is shown in Figure 4.1.
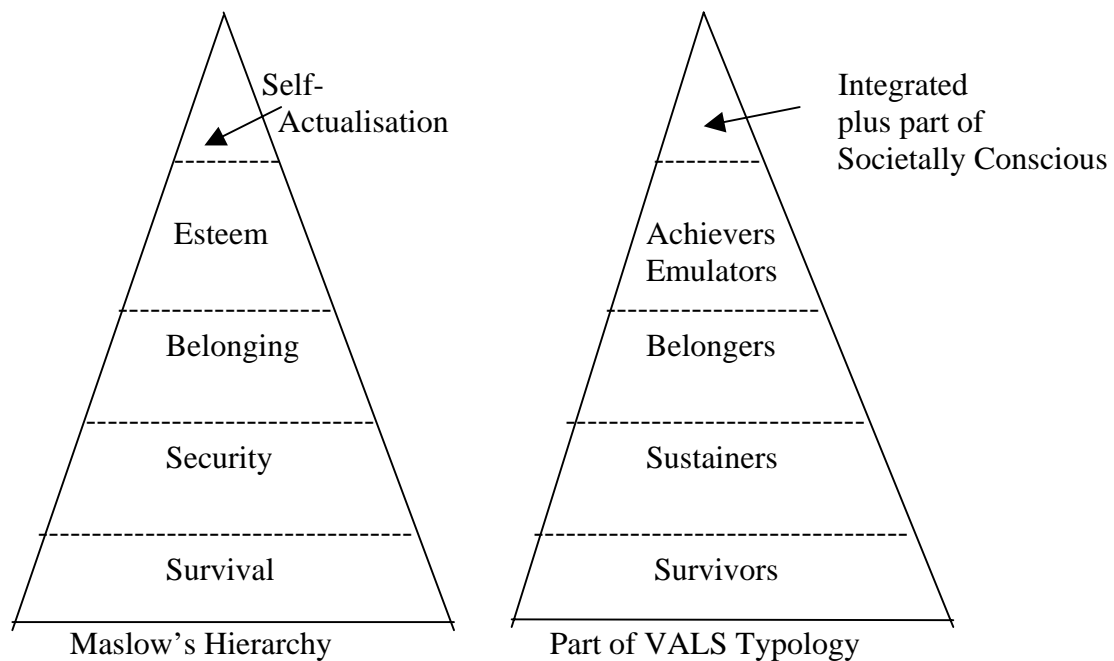
Figure 4.1. Comparison of Maslow and VALS schemes (Mitchell, 1979).

VALS expanded Maslow's hierarchy to include nine value clusters. At higher levels of need satisfaction, once basic needs had been met, individuals pursued either an inner- or outer-directed path. In this regard there is a similarity with Jung's introversion and extraversion (Jung, 1912/1956, 1923, 1995b; Sim, 1974). At the peak of the hierarchy there was an 'integrated' type that combined both inner-directed and outer-directed values (see Mitchell 1981, p.16 & Figure

4.2). A similar 'Idealistic Culture Mentality' type that had material and spiritual needs, combining both inner (Ideational) and outer (Sensate) values, had previously been hypothesised by Sorokin (1937/1962, Vol. 1, p. 75). An alternative humanistic view of the ideal self is an independence from society, with freedom from authority, culture and religion (Kvale, 1992).
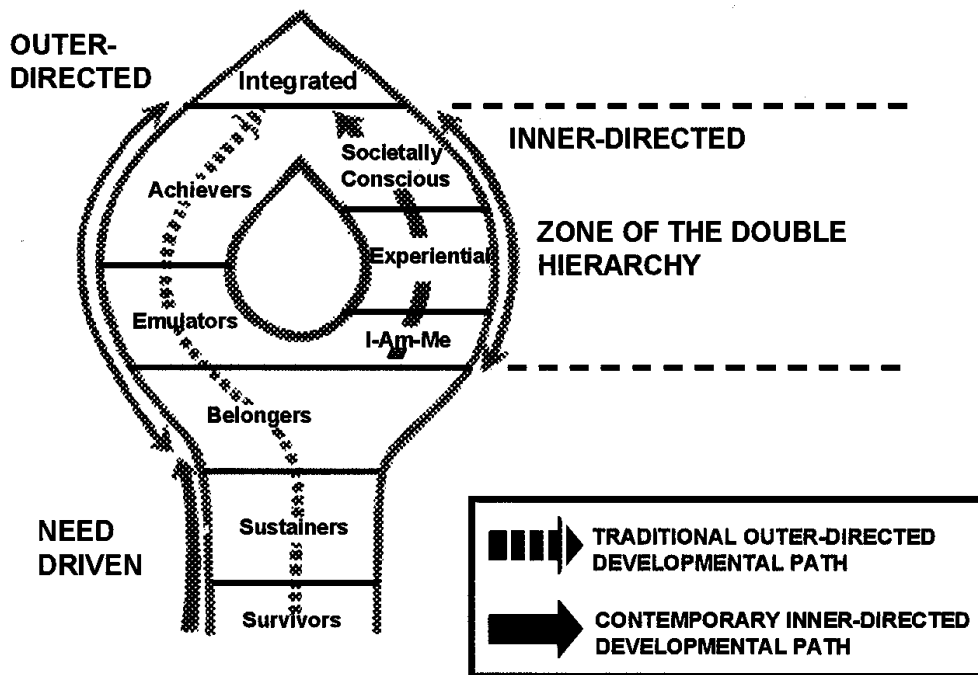
Figure 4.2. The VALS nine type double hierarchy (Mitchell, 1979).

The double hierarchy schema was later modified into four needs driven categories with the "Belongers" being placed into those who were outer-directed (Mitchell, 1981).

Need-Driven category

Survivor lifestyle
Sustainer lifestyle

Outer-directed category

Belonger lifestyle
Emulator lifestyle
Achiever lifestyle

Inner-directed category

I-Am-Me lifestyle
Experiential lifestyle
Societally Conscious lifestyle

Combined Outer- and Inner-directed category

Integrated lifestyle

An "a priori" assessment was made, based on previous research experience and theory, that these types existed. A measuring instrument was developed around the definition of each type, which was then applied to a sample of people who were categorised according to their replies. The main disadvantage of this technique is that the hypothesised types may not exist. Even if they do, the classification of a person into one or other type has often to be done on the basis of judgement, especially where the results for a subject indicate that they have the characteristics of more than one type. A further disadvantage of the VALS approach is that in a society, such as South Africa, which is rapidly changing, new types may be emerging and alterations occurring in existing types, which could not have been identified at the developmental stage.

Indeed, the original system did become outdated and a new version VALS-2 was subsequently introduced. VALS-2 has two main dimensions. The first, is the "Resources" that people have in the form of their material, physical and psychological capacities. The second, their "Self-Orientation" that is in turn subdivided into "principle-oriented" consumers guided by their

beliefs, "status-oriented" people influenced by what others think of them and "action-oriented" who seek action, risk and variety (Schiffman & Kanuk, 1997, pp. 70-71; Wilkie, 1991, p. 115). VALS-2 has a reduced number of eight segments, based on 35 attitudinal and four demographic questions, which are categorised according to these two main dimensions and subdivisions (see Figure 4.3).

	ACTUALIZERS		Abundant resources
Principle-oriented	**Status-oriented**	**Action -oriented**	
FULFILLEDS	ACHIEVERS	EXPERIENCERS	
BELIEVERS	STRIVERS	MAKERS	
	STRUGGLERS		Minimal Resources
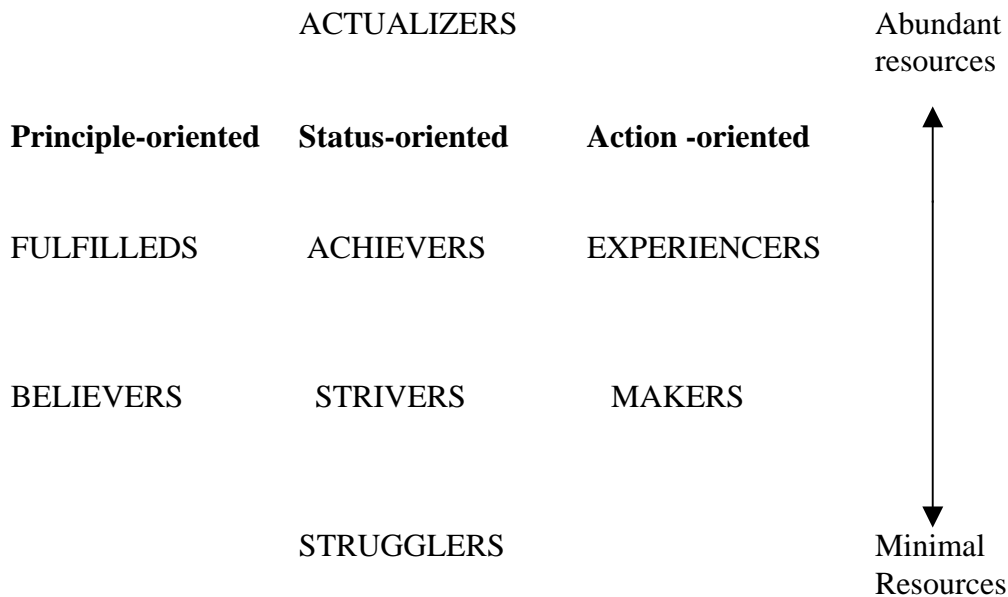
Figure 4.3. Eight consumer segments of VALS-2 (Wilkie, 1991).

A weakness of VALS 1 and 2 is the need for both attitudes and demographics to define segments. In South Africa, with its extreme level of income inequality (Whiteford, Posel & Kelatwang, 1995), demographics such as age and gender are a poor guide to resources. Attitudes and values also differ extensively within the same demographic groups (Market Research Africa, 1995a & b). The use of demographics would thus reduce the degree of heterogeneity between VALS consumer segments in attitudinal and value terms.

4.2.3 LIST OF VALUES (LOV)

A simplified technique for value measurement is the List of Values (LOV) that was derived from Rokeach's 18 terminal values (Kahle, Beatty & Homer, 1986; Kahle, Poulos & Sukidial, 1988;

Kamakura & Novak, 1992; Novak & MacEvoy, 1990). Rokeach's list was reduced to nine terminal values by using self-respect and accomplishment directly, and merging or generalising others (Kamakura & Novak, 1992). Subjects are asked to select the two most important from a set of nine values: fun and enjoyment in life, being well respected, excitement, security, self-fulfilment, self-respect, sense of accomplishment, sense of belonging, warm relationships. Alternatively, the nine values can be ranked, the method recommended by Rokeach, and/or rated on a nine-point scale (Kahle, Beatty & Homer, 1986; Kahle, Poulos & Sukidial, 1988; Kamakura & Novak, 1992). Apart from the greater simplicity of reducing Rokeach's values from 36 to nine, it is argued (Kahle et al., 1986, p. 406) that these values are more closely related to 'life's major roles (i.e., marriage, parenting, work, leisure, daily consumption)' than are Rokeach's.

In a comparison of LOV and VALS using a sample of 193 University of Oregon students Kahle et al. found that LOV had 'greater predictive utility than does VALS in consumer behavior trends' (ibid., p. 409). Novak and MacEvoy (1990) have challenged this conclusion on the grounds that this could have been due to the use of seven demographic variables. In a comparison of LOV and VALS using similar, but not identical, methodology on a national probability sample of 2,591 adults drawn from 5,882 household contacts, they found that VALS was superior to LOV on its own, but that 'demographics and LOV was superior to a model including only VALS' (p. 109). Since VALS also includes demographics, such a comparison may in itself be questionable.

LOV has been used to develop segments by assigning respondents to nine groups based on their most important value system derived from ranking and rating data. Kamakura and Novak (1992) applied this approach to a sub-sample of 1,406 subjects drawn from the national probability sample of 2,591 American adults surveyed in 1990 (see Table 4.6). Three of the segments, even after merging excitement and fun, had less than 10% of the total, which for most marketing purposes would be too insignificant to merit a differentiated approach.

Table 4.6

LOV top-rank segments

Top-rank segment	N =	Total 1,331 %
Accomplishment		18
Well respected		4
Excitement/Fun		6
Security		19
Self-fulfilment		11
Self-respect		22
Sense of belonging		4
Warm relationships		16
TOTAL		100

4.2.4   A THREE-DIMENSIONAL VALUE SPACE

Swedish societal values have been conceptualised by Zetterberg (1996a) as having three dimensions (see Figure 4.4). The first dimension was scaled from traditional stability "being" to modernism "becoming", where change was welcomed. The second dimension ranged from fidelity where 'one dramatises one's values' to pragmatism where 'one compromises one's values' (pp. 203-6). This dimension was derived by Zetterberg from the concepts of Max Weber in the early 1900's. Weber (1978, pp. 24-25) actually differentiated between four types of social action orientation: *value-rational (wetrational)* based on the perceived value of aesthetic, ethical or religious conduct, which was frequently irrational; *instrumental rationality (*zweckrational*)* which was a logical reaction to expectations; *affectual*, particularly emotional, and *traditional*

determined by customary behaviour. He conceptualised most social actions as being oriented to more than one of these ways. Zetterberg's third value dimension extended from materialism to a concern with human beings. Based on above or below average scores on the three dimensions he derived eight types: Folks, Uprights, Joiners, Matter-of-Fact, Zealots, Advocates, Mingles, Dare Devils. Those who had equal values on all three dimensions formed a ninth type, the Centrists.

3 Humanism
vs.
Materialism

2 Fidelity
vs.
Pragmatism

1 Change to modernity
vs.
Stability
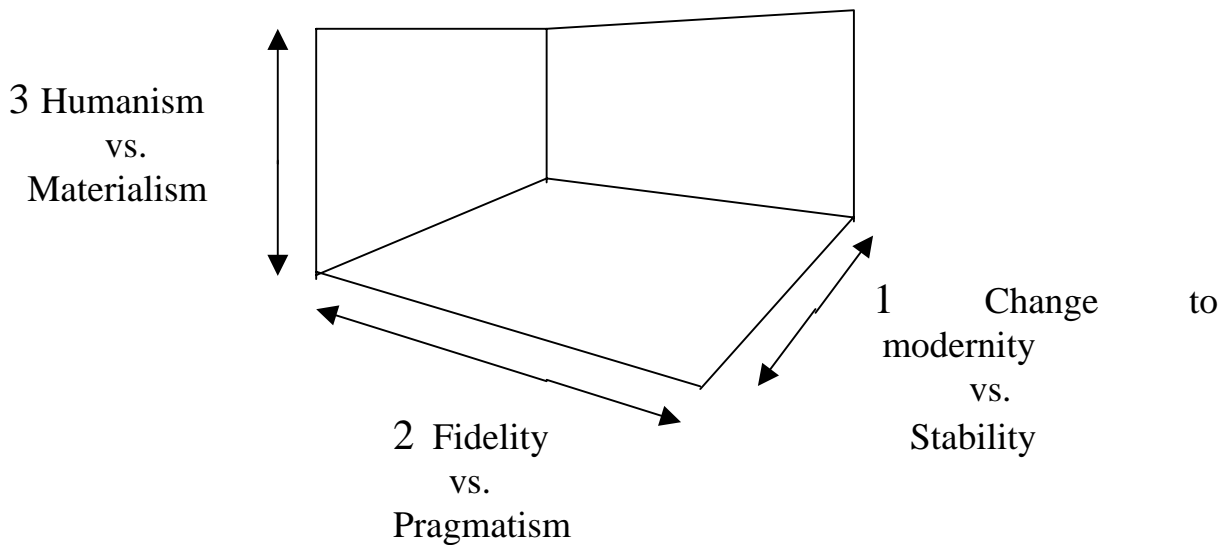
Figure 4.4. A three-dimensional value space (Zetterberg, 1996a).

There does not appear to be a clear correspondence between Zetterberg's value space and the hypothesised dimensions of individualism versus collectivism and inner- versus outer- directed. Whilst Zetterberg's change to modernity versus stability has similarities with individualism and collectivism respectively, his other dimensions do not readily correspond with inner- vs outer-directed; though it has been proposed that materialism is one of the features of outer-directness. In Sweden the majority of the electorate either work in the public sector, or are state clients (Zetterberg, 1996a) and therefore have less need to look outward and use individual initiatives to earn a living.

4.2.5   LADDERING

It is often important to be able to relate values to the usage of products and brands. This can be done by establishing values and consumption patterns in the same survey. Laddering uses an alternative approach. In a study done by Durgee, O'Connor and Verzyer (1996) fifty five mothers, aged 30 to 50, were initially asked to select five values that were most important in life from a list of 28 chosen to represent a combination of those used in the Rokeach Value Survey (RVS) and the List of Values (LOV) (see Table 4.7).

Table 4.7
Frequency of values chosen (N = 55)

Value	Percent of sample that indicated value is one of five most important in life %
Good health	75
Family security	56
Happiness	40
Freedom	33
Moral goodness	32
Self-respect	30
Wisdom	29
Warm relationships	27
World at peace	24
Accomplishment	16
Interesting life	15
Comfortable life	15
Inner- harmony	15
Self-confidence	13
Mature life	13
Self-expression	12
Equality	11
Exciting life	7
Salvation	7
Easy life	7
Material comfort	5
Competence	4
Pleasure	4
New experience	2
Social recognition	0
National security	0
Control	0
World of beauty	0

Respondents were then asked to indicate five items from a product list 'that most facilitate or make this value possible.' For each product they were further asked 'How does this product facilitate or enable this feeling?' (ibid., p. 92). The findings with respect to values using this approach were limited. Some important aspects, for example, "Social recognition" and "World of

beauty" did not receive a single mention from the 55 mothers. There are also indications that the ranking procedure gives very superficial and unreliable results. Abstract emotive values such as "Freedom," "Moral goodness" and "World at peace" have very high ratings, whereas "National security," surely a necessity for 'peace', received none.

Lerena (1999) espoused the view that laddering did provide insights into the relationships between values and products, which can be used to develop relevant marketing and communication. An illustrative example of the interrelationships between values, products and means, taken from the results of a pilot interview with a young man, is shown in Figure 4.5. Various means of self-expression are demonstrated through the use of different products.

Value	Means	Product
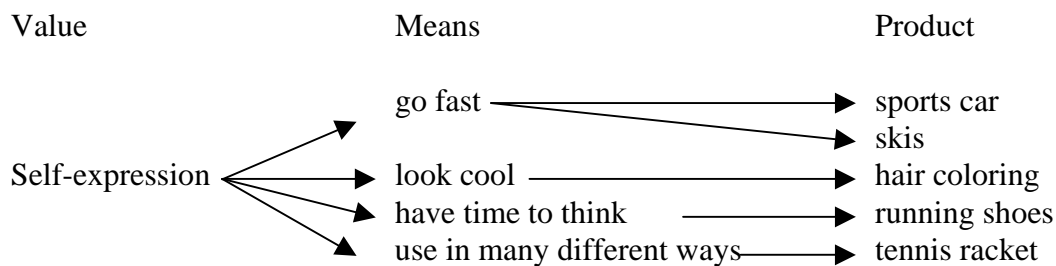
Figure 4.5. Value = Means = Product Chain for young male respondent (Durgee, O'Connor & Veryzer, 1970).

Another way of approaching laddering is to ask a series of questions that probe the distinguishing aspects between brands in a product class in terms of attributes, consequences and values (Reynolds & Gutman, 1988).

4.3   CHAPTER SUMMARY

In this chapter the nature of human values has been discussed. It has been noted that values change slowly and are remarkably stable. Five methods of measuring values have been outlined: the Rokeach Value Survey (RVS), List of Values (LOV), Values and Lifestyles (VALS & VALS-2), a three dimensional system used in Sweden by Zetterberg (1996a) and a laddering procedure that links values, products and means. There are a number of drawbacks to these methods. RVS requires respondents to rank two sets of 18 items, a procedure that could be unreliable. RVS has the disadvantage of not having a measure of intensity (Kamakura & Mazzon, 1991) and the same could be said of LOV. For instance, certain values may increase in relevance through time, but their rank order remains constant. LOV and VALS require demographic classifications, in addition to values, to enhance discrimination. Demographics do not have a clear-cut relationship with values in South Africa, and this is a serious weakness of both these approaches. Furthermore, VALS relies on an "a priori" assessment of the existence of groups, which in a country undergoing rapid socio-economic change, such as South Africa, runs the danger of becoming out-of-date very rapidly. Zetterberg's theoretical approach, based partially on Weber's earlier concepts, may be applicable in Sweden, but appears to be inappropriate for South Africa. His method is also limited in scope. Laddering does offer a way of linking values to products, but the technique could prove unreliable. The concepts used in the work of Durgee, O'Connor and Verzyer (ibid.) would almost certainly have very diverse meanings to the various sectors of the South African population; and it would be extremely difficult to find a common currency.

It would seem that none of the methods, based on the literature reviewed, is suitable for measuring the values likely to be held by adult South Africans, though the model outlined by Schwartz and Bilsky (1987 & 1990) and Schwartz (1992) has some cross-cultural applicability (see Figure 1.1).

In Chapter 6 a detailed description is given of Sociomonitor (Market Research Africa, 1995a, 1995b). Prior to this, Chapter 5 outlines what is understood by a typology and its use in market segmentation.

CHAPTER 5
TYPOLOGIES IN MARKET SEGMENTATION

5.1   INTRODUCTION

In the previous chapter the nature of human values was described. A number of ways for measuring values, some in common use, were outlined, together with their disadvantages and the difficulties of using them in South Africa.

In this chapter the concept of types of people is outlined. This is followed by an example of social stratification. Underlying the values that people hold are different systems that can be used as the basis for a typology. A technical definition is given of a typology and how one can be identified through the use of multivariate statistical analysis. Brief outlines of the major ways in which markets are segmented and the advantages of using values for this purpose follow. Examples of previous research segmenting the South African population by types, based on attitudes, lifestyle and values, are given.

5.2   TYPES

The identification of types of people by their emotions goes back to ancient times (Spranger, 1928/1966). Theophrastus (373-284 BC/1870) described 30 different moral "Characters" in Athenian society at the time of Alexander the Great and the way in which the people behaved and conversed.

Allport (1937) discriminated between a trait and a type. While people can have traits, they fit a type. A type encompasses more than an individual. It is a combination of interrelated attributes taken from a number of personalities. The boundaries between types are artificial and a person can readily be categorised into a number of different types. In this process individuality is suppressed and much of significance will have been lost.

Bolz (1977) believed that there would be many benefits if it were possible to group people into 'meaningful, distinct, and homogeneous groups' (p. 271). He differentiated between three typology categories. The first was one in which people from a segment of the population satisfied the requirements of distinctiveness and homogeneity, for example, different classes of students from the same culture. The second category was where a typology could validly be applied to the total population and not just to a specific subsection. The third was where types had been identified in the population on a large number of attributes, but could subsequently be identified through the measurement of an appropriate subset of aspects rather than the full range.

5.3   SOCIAL STRATIFICATION

A basic form of typology is social stratification, whereby people are ranked into a hierarchical order related to their standing in society (Berelson & Steiner, 1964).

For a period of more than a year spread over 1939, '40 and '41, West (1945) lived in Plainville, a southern Midwest town in the United States with a population of less than 1,000. During this time, he interviewed several hundred residents and took part in many of the town's activities. Based on the perceptions of upper-class people he encountered, he classified Plainville into a number of social classes (see Figure 5.1). The diagram indicates the proportions of the population who fell into the different groupings.
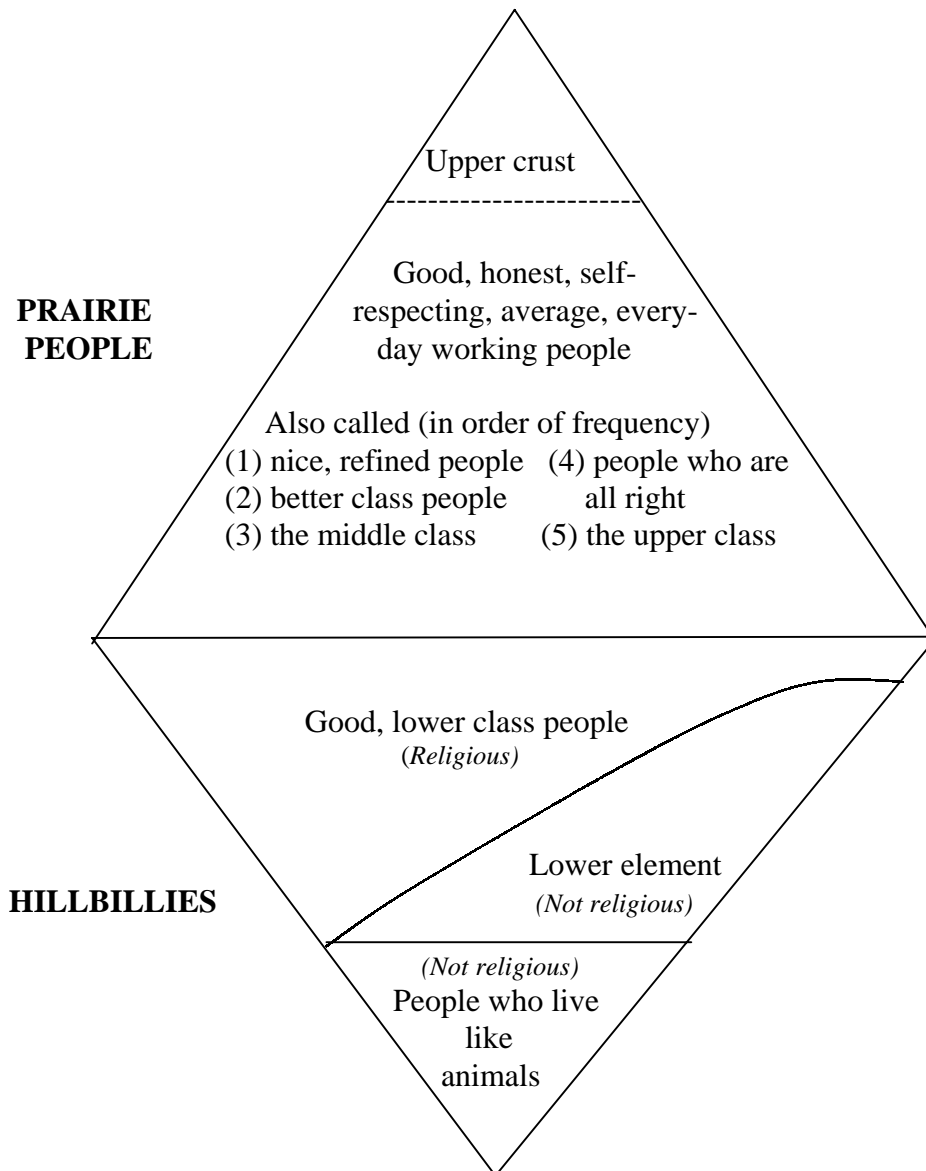
Figure 5.1. Plainville social classes (West, 1945).

The classification of local communities using techniques of social anthropology by West and others has been criticised by Parkin (1979) on the grounds of the high degree of subjectivity and differing findings. The relevance to larger urban communities was also questionable. Parkin further pointed out that, if economic conditions were used to determine classes, then there were no clear-cut borders.

A longitudinal study of 60 Black males, who were the social élite of a Reef township was made during 1959 and 1960 by Brandel-Syrier (1971). Those who were élite were characterised by their mobility, and opportunism, both in improving their education and in taking any chances that came their way. In many cases Europeans had assisted them. All 60 had achieved social standing, not only because they had a good job, or financial position, but also because their success was demonstrated through its visibility.

5.4   HOW IS A TYPOLOGY DEFINED?

The Research Institute on Social Change (1988) described a typology in the following way:

> *From a technical point of view, a typology is defined simply as a multi-dimensional system of classification. That is, a typology is simply the result of series of statistical operations, through which all subjects in a certain population are compared with each other and sorted into a predefined number of categories (the types) so as to minimize differences inside each category and to maximise differences across categories, according to a certain number of criteria (the dimensions of analysis).*

A possible criticism of the classification of people into types is the amalgamation of the similarities and differences that make for a human being. This is true. However, the richness of individual data is not lost, it has just been reduced to common underlying qualities for the purpose of understanding similarities. It is always possible to explore smaller groups, even individuals, in full detail within each type**.** It should however be noted that descriptions of types are abstractions of the dominant characteristics of a group of people and do not refer to actual individuals (Market Research Africa, 1992).

5.5 MARKET SEGMENTATION

5.5.1 GEOGRAPHIC SEGMENTATION

Markets have been segmented in many different ways (Kotler & Armstrong, 1990). One of the earliest forms of segmentation was geographic. Smaller manufacturers with limited resources and channels of distribution focussed on the local area. Hansen (1998) has found, with reference to Denmark, that geographic, together with other socio-demographic variables, have lost their power as discriminators of behaviour. However, geographic segmentation is still in operation, especially for products that are costly to distribute over long distances and that can be readily manufactured in different regions, for example, beer and cold drinks. Coastal and inland segmentation is applicable in South Africa for products where usage is determined by climatic differences, for example, hairsprays and insecticides. Community is a further relevant criterion, as the degree of urbanization impacts on the level of marketing practice and sophistication. There are also wide differences in ethnic and language proportions in different communities (see Figure 5.2). In Figure 5.2 Afrikaans/Both refers to people who speak Afrikaans, or both Afrikaans and English on a regular basis in their home. English/Other includes English and languages other than the vernacular. Nguni refers to Xhosa and Zulu, while Sotho/Other incorporates North and South Sotho, Tswana, Tsonga, Venda and other vernacular.
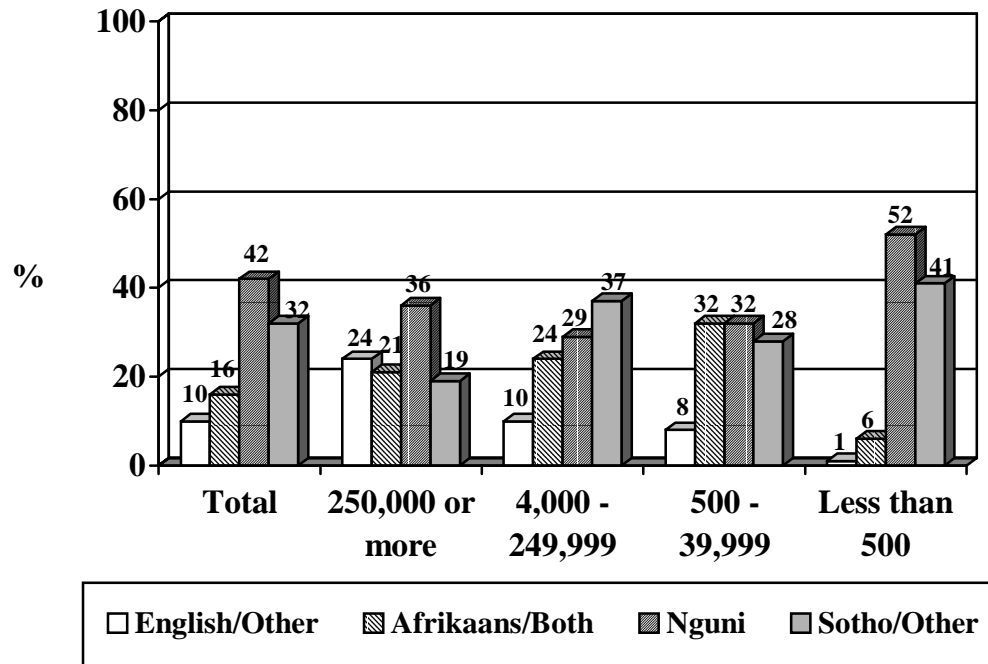
Figure 5.2. Comparison of home language by community size (South African Advertising Research Foundation, 1997).

It has been argued that consumers with similar characteristics live in the same neighbourhood, and that suburban segmentation is an effective approach. In the United States, the PRIZM neighbourhood lifestyle clusters are used for the location of customers by area, designing promotional communication and understanding response. The system is based on census data combined with lifestyle (Dillon, Madden & Firtle, 1994). However, in a detailed longitudinal study of Park Forest, a suburban housing development in America, Whyte (1956) found marked differences in uniformity of families and social interaction in the same area. Though many other variables such as family composition, children, personality, status in the community and type of employment had an influence, the major determinant of conformity and conflict was the layout of housing courts. For instance, social development was different if it was informal over the backyard or across the front lawn.

5.5.2   DEMOGRAPHIC SEGMENTATION

Demographic segmentation is extensively used. Products are frequently aimed at a particular age, gender or income group. Frank (1967) however pointed out that socio-economic aspects did not contribute very much to understanding variations in buying behaviour, consumption, loyalty and price paid. A further criticism of demographics is that from the late 1970's they have become less effective as discriminators of people and predictors of behaviour; being replaced by attitudes, beliefs and values (Dawson, 1998).

5.5.3   VOLUME SEGMENTATION

Volume segmentation is conceptually appealing. If a small number of consumers are responsible for the bulk of consumption and purchase, then it should be more efficient to concentrate marketing efforts in this direction. For most product categories, Twedt (1964) found that only half the buyers made 80 percent or more of purchases; though Morrison (1968) believed that this could be a statistical artifact. Furthermore, Haley (1968) has identified a flaw in this approach. He gave the example of heavy coffee drinkers, where there are consumers who buy premium brands for their better taste and others who purchase cheaper brands because they use so much. There are therefore two distinct brand requirements in the heavy usage group. Heavy users also tend to be more loyal and are harder to convert.

5.5.4   PERSONALITY, LIFESTYLE, INTERESTS, ATTITUDES AND OPINION SEGMENTATION

Personality, lifestyle, interests, attitudes and opinions have also been used to segment markets (Broadbent, 1973; Michman, 1991; Swenson, 1990; Wells & Tigert, 1971). After a review of these approaches, including combinations of attitudes and personality, Kassarjian (1971) concluded that they only accounted for a small proportion of the variance in buying behaviour. Greater success has been found with self-concept, an aspect of personality.

5.5.5 SELF-CONCEPT SEGMENTATION

Grubb and Grathwohl (1967) have described how the self-concept was formed through the interaction with other people, such as parents, teachers and friends. Products, and the way they are used, communicated meaning both to the individual and to others. For example, Pontiac and Volkswagen owners assigned similar values to both themselves and to other owners of these makes. Pontiac owners were more likely to think of themselves and other Pontiac owners as adventurous, fashionable, interested in the opposite sex, pleasure seeking, sporty and status-conscious (Grubb and Hupp, 1968). In contrast, Volkswagen owners and drivers were economical, practical and thrifty.

The White South African urban market has been segmented by Corder (1976) based on a self-assessment of 30 concepts by a representative sample of 1,039 urban adults, into eight self-concept types. Respondents were asked to say whether they agreed a lot, a little, were not sure, or disagreed a little, or a lot that each concept described them. The mean scores for each of the eight types on the 30 self-concepts are given in Table 5.1.

Table 5.1

Mean scores of eight self-concept types on 30 self-concepts

Self-concept	Types							
	1	2	3	4	5	6	7	8
Self-sufficient	2.1	3.7	4.2	4.0	4.5	3.3	4.7	2.8
Refined	2.1	3.1	4.1	3.7	3.5	2.2	4.2	3.3
Awkward	1.3	3.5	2.4	1.9	3.0	2.6	1.9	3.1
Dominating	2.5	3.0	1.4	3.6	3.4	2.0	1.5	2.5
Suspicious	2.0	3.2	3.5	2.6	4.1	2.0	2.0	3.6
Apprehensive	1.6	3.5	3.0	2.0	3.8	1.8	1.9	3.4
Serious	1.2	2.4	3.3	2.4	3.5	1.8	2.1	3.4
Group Dependence	4.5	4.2	3.7	3.1	4.1	4.3	4.4	3.4
Kind	2.9	3.2	2.3	3.3	4.2	3.3	3.0	3.1
Efficient	4.5	3.5	3.0	4.0	4.4	3.6	4.4	2.6
Frank	4.7	4.2	4.3	4.5	4.8	4.0	4,7	3.2
Sociable	3.1	3.3	1.9	3.6	3.5	2.7	1.9	3.0
Broadminded	4.5	4.2	3.7	3.1	4.1	4.3	4.4	3.4
Stubborn	2.9	3.2	2.3	3.3	4.2	3.3	3.0	3.1
Reserved	4.5	3.5	3.0	4.0	4.4	3.6	4.4	2.6
Self-assured	4.7	3.8	3.3	4.4	4.5	3.8	4.4	2.9
Trustworthy	3.2	4.0	2.5	2.3	3.5	2.8	3.0	2.9
Amicable	4.5	3.9	3.9	3.2	4.3	3.9	4.5	3.0
Affectionate	4.3	4.3	3.7	3.1	4.3	4.0	4.3	3.2
Brave	3.9	3.4	2.5	3.5	4.3	3.0	3.7	2.5
Egocentric	1.7	2.5	1.4	2.1	2.7	1.8	1.3	2.3
Affected by Feeling	2.6	4.1	3.8	2.9	4.4	2.8	2.7	3.7
Intelligent	4.8	4.4	4.5	4.1	4.8	4.1	4.9	3.5
Shy	4.8	4.3	4.0	4.2	4.7	4.1	4.7	3.3
Conservative	3.4	3.8	4.4	3.6	4.0	2.7	4.3	3.5
Trusting	4.8	4.3	4.7	4.6	4.9	4.2	4.9	3.7
Creative	3.7	3.8	2.8	3.2	4.0	2.9	3.7	2.5
Happy-go-lucky	4.5	3.7	3.5	3.9	4.3	3.5	4.4	2.9
Funny	4.5	4.2	3.1	3.6	4.3	3.6	4.2	2.9
Tense	4.1	4.0	4.3	3.6	4.3	3.3	4.3	3.5

Extensive differences were found among the eight types for brand advertising awareness and usage for a personal care product (see Tables 5.2 & 5.3).

Table 5.2

Spontaneous advertising awareness of brands in personal care product field for eight self-concept types*

| | | Self-concept type | | | | | | | |
	Total	1	2	3	4	5	6	7	8
Brand	%	%	%	%	%	%	%	%	%
A	12	22	14	12	12	10	7	12	4
B	26	29	31	22	26	29	22	25	18
C	19	15	15	13	9	15	13	15	6
D	19	22	16	21	15	21	18	34	11
E	30	31	30	30	26	36	27	30	28

*   Decimal places omitted.

** Based on data from 1,039 adult urban Whites.

Table 5.3

Brand usage in personal care product field for eight self-concept types*

| | | Self-concept type | | | | | | | |
	Total	1	2	3	4	5	6	7	8
Brand	%	%	%	%	%	%	%	%	%
A	3	4	2	1	4	2	3	4	1
B	9	7	8	7	12	9	8	11	12
C	5	4	9	3	5	4	3	5	3
D	5	8	5	7	5	6	6	4	3
E	11	9	12	7	14	14	7	9	13

*   Decimal places omitted.

** Based on data from 1,039 adult urban Whites.

5.5.6   SEGMENTATION BY LIVING STANDARD

A Living Standard Measure (LSM) has also been used to segment South African adults on a national scale (Smit & Montgomery, 1991; South African Advertising Research Foundation, 1999). The aim behind this approach was to find a more discriminating way of market segmentation than could be determined by using only demographics. Principal component

analysis was applied to a range of independent variables selected by marketing and marketing research experts from aspects already being measured in the All Media and Products Survey (AMPS). AMPS is a national survey of South African adults regularly conducted by the South African Advertising and Research Foundation (SAARF). The main object of AMPS is to provide single source data covering demographics and the usage of media and products (South African Advertising Research Foundation, 1998). Thirteen variables were identified by stepwise regression from those represented in the first principal component, as contributing most to a range of items that described living standards. These were: polisher/vacuum cleaner, fridge/freezer, television set, water/electricity in the home, washing machine, one or more cars, hi-fi music centre, sewing machine, supermarket shopping, rural dweller, one or more domestic servants, VCR and tumble dryer (Smit & Montgomery, 1991). These 13 variables were found to be stable for AMPS 1987/88 and AMPS 1988/89, explaining over 99% of the variance of the first principal component in each case (South African Advertising Research Foundation, 1997). Initially AMPS respondents were allocated to one of eight LSM groups based on their score on the first principal component. Those in the lowest octile were categorised as LSM 1, those in the second lowest LSM 2, up to the highest octile that was LSM 8. Only the first component was used, as it explained over 80% of the variance of all principal components. The eight groups, in order of living standards, were given descriptive handles, as follows: LSM 1: Traditional Have Nots, LSM 2: Self-Centred Non-Earners, LSM 3: Compound and Hostel Dwellers, LSM 4: Urbanised Singles, LSM 5: The Young Aspirers, LSM 6: Emerging Market, LSM 7: Established Affluents and LSM 8: Progressive Affluents. Subsequently, in order to put a measure on the improvements taking place in South African living standards, the score dividing the groups was set at fixed limits. A decline of the number of people in the lower LSM groups in favour of those in the middle and higher groups would indicate a rise in living standards. In 1995 the number of variables was extended to 20, as it was considered that this would provide greater discrimination, especially for LSM's 7 and 8, which were subsequently sub-divided into 7 low and high, 8 low and high. The names of the LSM's were also omitted, as the "handles" used did not adequately describe the diversity of people within each group.

LSM's have found wide acceptance in the market place and are used extensively for target market definition and media selection. Major differences are found in the consumption of media (see Figure 5.3) and product usage by the eight groups.
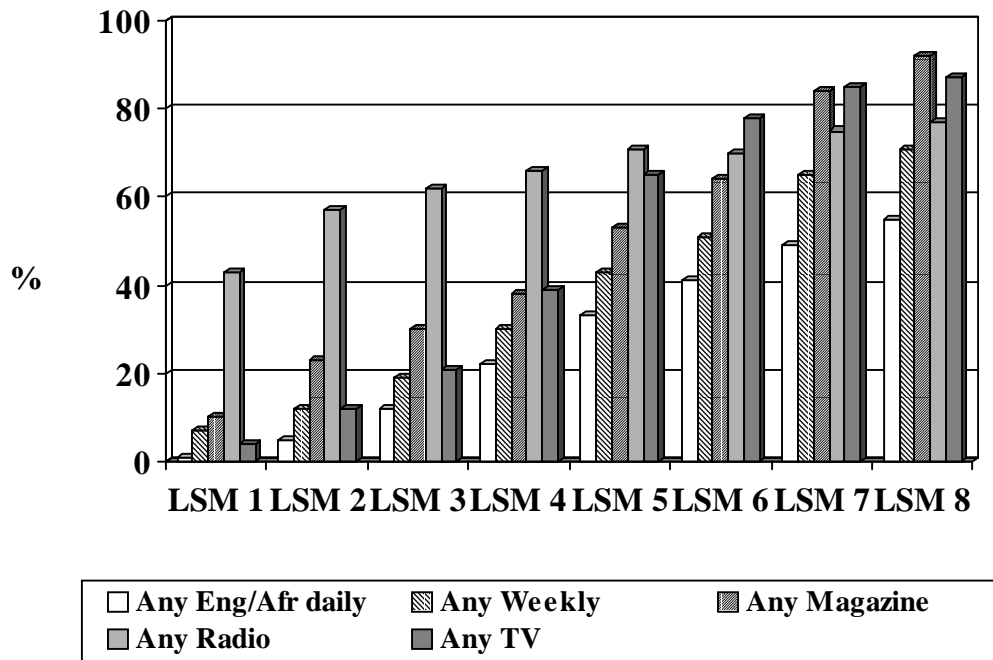
Figure 5.3. Media consumption by LSM group (Smit & Montgomery, 1991).

The use of the LSM as a single discriminator has been criticised by Corder (1996) because on its own it can be extremely wasteful. He has advocated the definition of target markets through the use of a combination of LSM's and a multiplicity of criteria appropriate to the product category, including behaviour, brand perceptions and demographics.

5.5.7 BENEFIT SEGMENTATION

The benefits that consumers seek in products and brands have been used as the basis for market segmentation (Corder, 1976; Haley, 1968). There is an inherent logic in the classification of consumers into groups who share the need for similar bundles of benefits. Kotler and Armstrong

(1990) have described benefits as a 'powerful form of segmentation' (p. 210). They have suggested that companies could search for new benefits when developing brands. However, though recognising that benefit segmentation has been a preferred method for many years, Wansink and Park (2000) single out that segments can have limited life and be poor discriminators between brands that offer the same advantages. A further criticism made by Blattberg and Subrata (1974) was that, as the segments were not behaviour based, there is no guarantee that they will predict purchase.

5.5.8   SEGMENTATION BY VALUES

A major advantage of typological segmentation based on values is that it identifies groups of people in terms that are causal to behaviour, rather than descriptive. Both benefit and value segmentation have this in common. This is not surprising, as the benefits sought in products are expressions of values. Benefits often have a resemblance to the 'desirable end states' of Rokeach's terminal values (1973, p. 7), for example, "a comfortable life", "family security" and "mature love" (p. 57). Values would tend to be more all embracing, while benefits would be more product related.

Burgess (1990, p. 235) felt that there was 'strong evidence' that markets could be segmented by personal values and that values were an 'important race-neutral segmentation technique marketers could successfully use within the changing South African environment' (p. ii).

5.5.8.1 Cross Cultural Consumer Characterisation (4c's)

Young & Rubicam (1988), an international advertising agency, developed a 4 C's model of behaviour, following Maslow's (1954) theory that certain goals, motivations and values are universal. The primary objective of this approach was to describe various internal inputs that are related through choice to alternative external outcomes (see Figure 5.4).

INTERNAL INPUTS   **EXTERNAL OUTPUTS**

Goals   : What I want   Lifestyle

Motivations   : Why I want it   CHOICES   Work

Values   : What I got from it   Purchase
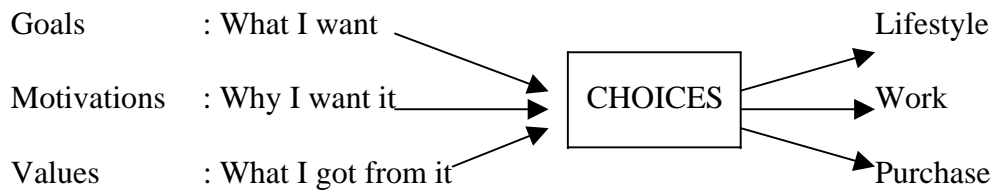
Figure 5.4. Model of behaviour (Young & Rubicam, 1988).

The 4C's model postulated seven value typologies, each of which had its own characteristic goals, motivations and values. These typologies were further grouped, in line with Maslow's theory (1954) into three types: need driven, outer-directed and inner-directed (see Figure 5.5).

TYPE	GOAL	MOTIVATION	VALUE
NEED DRIVEN			
Resigned	Survival	Given up	Subsistence
Struggling	Improvement	Escape from hardship	Hope and luck
MORE OUTER-DIRECTED			
Mainstreamers	Security	Conformity Family responsibility	Social
Aspirers	Success	Envy	Status
Succeeders	Control	Achievement	Recognition
MORE INNER-DIRECTED			
Transitionals	Self-identity	Rebellion	Self-satisfaction
Reformers	Social betterment	Social conscience	Social altruism

Figure 5.5. Value typologies of the model of the 4C's (Young & Rubicam, 1988).

The seven typologies were positioned in a two dimensional framework and matched against Maslow (1954), VALS (Mitchell, 1979, 1981) and Sociomonitor (Market Research Africa, 1995a, 1995b) (see Figure 5.6).

CONSTRAINED

Physiological and security needs (Maslow)

STRUGGLING
Sustainers (VALS)

RESIGNED
Survivors (VALS)

TRANSITIONAL
Experientials (VALS)
Innovators (Sociomonitor)

MAINSTREAMER
Belongers (VALS)
Belonging needs (Maslow)
Responsibles (Sociomonitor)

ASPIRER
Emulators (VALS)
Yuppie (Sociomonitor)
Esteem needs (Maslow)

SUCCEEDERS
Achievers (VALS)
Self Motivateds (Sociomonitor)

REFORMERS
Societally conscious (VALS)

Figure 5.6. Two dimensional framework of the 4C's (Young & Rubicam, 1988).

The 4C's was a conceptual model of people regardless of race, however, it was never validated against the total population of South Africa.

5.5.8.2 Psychographic segmentation of the South African furniture market

A psychographic model for furniture buyers based on VALS, Sociomonitor and Young & Rubicam's 4Cs was developed by Rousseau (1990). The model specified five consumer groups: "Home-centred", "Outer-directed", "Trend setters", "Inner-directed" and "Cultured". The latter group, as proposed by Mitchell (1981), was hypothetical, representing 'an integration of outer and inner-directed values in an elegant lifestyle' (Rousseau, 1990, p. 187). These groups were defined according to demographics, consumer values and product attribute perspectives. Eighteen theoretical constructs were drawn up, which characterised the values and lifestyles of the five types. Each construct was then initially broken down into approximately nine items. A final list of 72 items, consisting of three to five per construct, was finally selected after a review of the content validity by a panel of six judges.

The measuring instrument was then applied by University of Port Elizabeth students to a

stratified, random sample of 357 White and 150 Coloured households drawn from telephone directories for the Port Elizabeth/Uitenhage area. Either the wife or the husband completed the questionnaire in an in-home personal interview.

Through the use of factor analysis, four segments, instead of the five hypothesised, were identified: "Home-centred", "Outer-directed", "Trend-setter" and "Inner-directed". Twenty-one secondary factors, in lieu of the original 18 constructs, were also found. A comparison of the hypothesised types and constructs with those identified is shown in Table 5.4.

Table 5.4

Comparison of hypothesised types of furniture buyers and constructs against those found (N=507)

Hypothesised		**Identified**	
Consumer type	Constructs	Consumer type	Secondary factors
Home centred	Security and risk perception Functional utilitarian Family oriented Conservative traditional	Home centred	Careful Functional Family oriented Conservative Traditional Understated
Outer-directed	Status Social acceptability Materialistic Fashionable Conspicuous consumption	Outer-directed	Status Social approval Social acceptability Fashion Risk
Trend setters	Innovator Opinion leader Impulse buyer	Trend setters	Innovator Opinion leader Impulse buying Conspicuous consumption Individualist Understated unique Achievement
Inner-directed	Individualist Achievement Understated traditional	Inner-directed	Elegance Materialistic Information search
Cultivated	Self-actualization Elegance Understated unique	----------	This type was not identified

The results of this segmentation study lend support to the existence of two primary dimensions underlying values: individualism versus collectivism and inner- versus outer-directed. The identified "Home-centred" consumer type had many of the characteristics of collectivism, while

the "Trend setters" type was strong on secondary factors that could be expected to be associated with individualism. However, the "Trend setters" consumer was also inclined to conspicuous consumption, a feature of outer-directed. The expected constructs of "fashionable", "social acceptability" and "status" were found among the "Outer-directed". "Materialism" however was a feature of the "Inner-directed" rather than the "Outer-directed" type. This could have been because the items contributing to this factor were "I always observe and appraise furnishings in the home of others" and "I am prepared to pay more for prestigious furniture". These statements do not necessarily imply the desire for material goods. In other respects the "Inner-directed" type was concerned with inner values of elegance, self-fulfilment and style.

Proposition 5.1

The "Cultivated" type hypothesised by Rousseau (1990) is unlikely to exist in South Africa.

5.6   REACHING CRITICAL MASS

"Reaching Critical Mass", done by the South African Broadcasting Corporation (1989), was the first study to investigate the possibility of a national typology for both urban and rural Blacks. The survey was based on personal interviews with a national probability sample of 4,091 Black adults, aged 16 years and over. The questionnaire included a wide range of questions related to media usage, lifestyle and attitudes, together with comprehensive demographics. Six types were identified. The most rural was the "Resigneds" (16% of the adult population). Among members of this group there was a feeling of hopelessness with life being tempered by caution. The oldest and least well-educated type was the "Traditionals" (22%), being very involved with their community and respected tribal ways. There was a further predominantly rural type, the "Antis" (16%). Here there was concern with status, but also a feeling that it was not possible to really succeed in life. Those who had adopted a Western lifestyle, rejecting their tribal origins, were to be found in the "Moderns" (14%). Whereas people who were community orientated, with a desire to live in peace with other racial groups, were more likely to be "Good Neighbours" (14%). As its name suggests, the most sophisticated of the types was the "Emancipateds" (16%).

Reaching Critical Mass was updated in 1991, for which time the optimum solution was judged to be five types. Two groups, the "Resigneds" (19%), the least well off of all the groups, and the "Endurers" (20%), were predominantly rural and maintained traditional values. Two further groups had a distinctive progressive and Western personality, the "Emancipateds" (21%), the most urbanised, and the "Materialists" (19%). Of particular relevance was the emergence of a "Transitionals" group (21%), which personified the developments taking place, as people adjusted from their agrarian third world up-bringing to a get-ahead first world environment (South African Broadcasting Association, 1991).

5.7   CHAPTER SUMMARY

In this chapter the advantages of using values as a means of segmenting markets, as compared with other traditional methods, have been discussed. A description has been given of the concepts of types and typologies and the way in which they can be identified. The types found in two Reaching Critical Mass studies conducted by the South African Broadcasting Corporation have been described. The 4C's, a theoretical value framework proposed by Young & Rubicam, has been summarised. The development of a typology for furniture buyers, based on the 4Cs, VALS and Sociomonitor, has been outlined. The four types that were identified support the contention that there are two primary dimensions underlying values: individualism versus collectivism and inner- versus outer-directed.

In the next chapter a description is given of Sociomonitor, a survey of values of relevance to media and marketing decision-makers, which was conducted in South Africa during the period 1976 to 1996.

CHAPTER 6
SOCIOMONITOR 1976 - 1996

6.1   INTRODUCTION

In this chapter the background to the introduction of Sociomonitor into South Africa is given. Sociomonitor is an on-going investigation of the values of South African adults that are of relevance to decision-makers. It has been described by Burgess (1998) as 'providing rich descriptions of generic segments' (p. 37). Similar studies are done in over 20 countries in Europe, Japan, North and South America. The 1997/8 Sociomonitor has been used as the data source for testing the theoretical framework developed for this present study (see Chapters 7 - 8).

A technical description is provided of the way in which Sociomonitor was conducted among urban Blacks and Whites during the period 1976 to 1996. Separate typologies for Blacks and Whites, based on the results of the 1995 survey are described. Twenty-four values that could be regarded as common to humankind are identified and these are used to search for similarities between the two races. The statistical procedure for combining results of the values held by Blacks and Whites is supplied. An analysis of the results of this amalgamation led to the identification of three groups with different underlying value systems that could be placed on the hypothesised dimensions of individualism versus collectivism and inner- versus outer-directed. Details of the statistical analysis of the 1995 survey and information regarding previous Sociomonitor surveys are available on request.

6.2   SOCIOMONITOR

Sociomonitor was initially carried out on an annual basis from 1976 to 1993, with urban Blacks and Whites being covered in alternate years. In 1995 the major portion of the fieldwork for both Blacks and Whites was conducted in the same year. The basic methodology for monitoring the intensity of values was virtually unchanged with only minor modifications during the period 1976 to 1996. The approach used in the 1995 Sociomonitor together with findings related to values is

described below (Market Research Africa, 1995a, 1995b).

6.2.1   THE MEASURING INSTRUMENT

The technique used by Sociomonitor to measure values was originally developed by Vulpian (1980) of the French research observatory, Cofremca, and is similar in concept to the procedure devised by Yankelovich, Skelly and White, Inc., in the United States (Yankelovich, 1981).

The initial development work for the South African measuring instrument was done during 1974 and 1975. The starting point was to identify values that were relevant to social change, and to define them. Information on values that were being measured in France, Great Britain and the United States was obtained. The applicability of these values to South Africa was reviewed in the light of previous research experience and local knowledge. In addition, qualitative work was done among urban South African Blacks and Whites, in the form of focus groups. This was followed by a number of small-scale pilot studies of 100 Black and 100 White adults using batteries of statements related to preliminary value definitions. Based on the review of overseas experience and the exploratory research findings, a number of values considered of particular relevance to marketing and media in South Africa were selected and defined. Over time, the definitions of these values were modified in the light of survey findings and changing circumstances. A few additional social values were also identified, defined and measured. The importance of carefully defining constructs prior to generating items, especially when working in cultures other than one's own, has been emphasized by Brislin (1986).

Sets of statements, each focussing on an aspect of the definition of each value, were formulated. These statements were placed in 6 different 4-point scale frameworks, which were in the form of acceptance of the truth of various assertions, alternative choices, degree of identification, importance ratings, levels of agreement and similarities of viewpoint. For example, in the case of the alternative choices, respondents were asked to choose between two alternatives, and then to decide whether this had been an easy or difficult choice. For the identifications informants were required to say whether they considered different kinds of people expressed in various statements

were "Very similar", "Fairly similar", "Rather different", or "Very different" to themselves.

In some cases, in the analysis of the pilot studies, it was found that statements selected to measure a value were strongly correlated with each other. Beale's interrelationship analysis was used to reduce the initial statements to a smaller number that had low correlations with each other, but which in combination explained a high proportion of the total variance of all the statements tested for a particular value. In the construction of statements, words and meanings that could be influenced by fad or fashion were avoided. The statements measuring each value were spread randomly throughout a structured questionnaire that also covered demographics, lifestyle, living standards, media and product usage.

In the 1995 Sociomonitor a total of 34 values were measured among Blacks and 30 among Whites. While the definitions of these values were in most cases similar, the statements used to measure theme among Blacks and Whites frequently differed. For example, in the measurement of the value "Economy Minded" a statement that a well off White housewife might agree represented economy could be regarded as an extravagance to a Black housewife living in a backyard shack. If it is accepted that Blacks and Whites come from different cultures, then value definitions can be considered to be etic, in that they could be applied across cultures. Individual statements used to measure each definition that differed for Blacks and Whites could be considered to be emic, in that they were culture specific (Triandis, 1980).

The questionnaire was developed in English and then translated into Afrikaans and the main vernacular: North and South Sotho, Tswana, Xhosa and Zulu. Other researchers familiar with both English and the relevant vernacular then translated the questionnaire back into English. This back-translation was done to ensure equivalence. The English version was modified, if necessary, until there was concordance. The back-translation procedure has been proposed by Brislin (1970, 1986) and strongly recommended by Segall (1986). An alternative, noted by Sperber, Devellis and Boehleck (1994), is to use bilingual people, though there could be a risk that such subjects would differ from people who are monolingual. In South Africa, the majority of the population speak at least two languages and such a consideration would not apply. However, the back-

translation procedure was preferred, as it was felt that this would reduce the chance of invalid responses.

6.2.2   UNIVERSES

The universes for the 1995 Sociomonitor were urban Black and White adults, aged 16 years and over, throughout South Africa, living in metropolitan areas, cities, towns and villages with a total population of over 500.

6.2.3   SAMPLE SIZE AND SAMPLING PROCEDURE

Two thousand and eight Black and the same number of White dwellings were drawn from a dwelling unit census, after stratification by area. At each dwelling, when contact had been made, all female or male adults were listed in order of age and one was chosen using a random grid. Three calls were made at different times of the day and days of the week, prior to taking a substitute of the same gender from an adjoining or nearby dwelling.

A total of 2,005 Blacks and 2,003 Whites were included in the final sample. Findings were grossed up to an estimated 8,212,000 urban Blacks and 3,599,000 urban Whites. The cells used in weighting the sample to population were: Government of National Unity (GNU) region, community size, gender, age and home language.

The sampling procedure was similar to that employed for AMPS in urban areas (South African Advertising Research Foundation, 1997). External validation of the AMPS sample against known criteria, such as number of motor vehicles, M-Net decoders and telephone installations and ownership of durable goods has been excellent (ibid.). Statisticians of the University of the Witwatersrand and Human Sciences Research Council (HSRC) have approved the sampling techniques used.

6.2.4 FIELDWORK

Fieldwork for Whites was done during the period February to mid June 1995. Black fieldwork started at the end of October 1995 and was completed early in January 1996.

Data was collected from the Black subjects by means of an in-home personal interview using a structured questionnaire. In the case of the Whites, a section of the questionnaire was placed for personal completion and subsequently picked up by an interviewer. In view of the length of the process, sometimes lasting over two hours, a gift was provided. A minimum of 35% of the interviews was back checked by mail, telephone or personally, in order to ensure validity.

6.2.5 ANALYSIS OF VALUES

The results for Blacks and Whites were initially analysed separately. Values for each race were measured using up to five statements evaluated on 4 point scales. As mentioned previously, diverse statements were often used, because the values being measured within each race group were considered to be different, or because variations in economic and cultural conditions required alternative statements (see 6.2.1 The measuring instrument). Each respondent was assigned a score normalised to ten for each statement. These scores were then summed for each subject to give a total for each value. The distributions of the totals for each value were then examined and those subjects with scores in the top quartile were classified as value leaders.

6.2.5.1 Correlation of value scores and positioning on multidimensional map

The first step in exploring the possible underlying structure was to establish phi correlations based on the individual normalised scores for each respondent on each value. The usefulness of using correlations to understand collectivism and individualism has been demonstrated by Triandis et al. (1993). The higher the correlation between values the greater the likelihood of some interrelationship. Conversely, low or negative correlations would indicate that such values are unlikely to be commonly held. Brown (1985) has noted that the relationships between

concepts were a key issue for social researchers. The correlations were then converted into distances by subtracting them from the unit one. For example, a positive correlation between two values of 0.3 was equivalent to a distance of 1.0 - 0.3 = 0.7, whilst a negative correlation of -0.3 converted to 1.0 - (-0.3) = 1.3. Values with low, or negative, correlations would thus be far from each other and vice versa. These distances then formed the input for metric multidimensional scaling (MMDS), which was used to explore the relationships between the values, an approach recommended by Brown (ibid.). A two dimensional representation of the location of each value was produced. Values that were highly correlated tended to be close together and vice versa.

6.2.5.2 Factor analysis of correlations and identification of value types

The correlation matrix of the scores for all the values also provided the input for principal factor analysis with varimax rotation, an orthogonal method that makes it easier to interpret factors by minimising the number of variables that have high loadings (Malhotra, 1999). The basic philosophy was to look for an underlying value system. In the conception of this approach, the individual values could be regarded in the same way as personality traits (Cattell, 1950), or as Cattell's 16 Primary Factors that were separately defined and measured. The procedure to explore the possible existence of an underlying structure was also similar to that used by Cattell to uncover second-stratum personality factors based on the correlations of the 16 Primary Factors (Cattell *et al.*, 1970). Separate factor analyses were done for Blacks and Whites, because of the different structure of the questionnaires used. Each subject was assigned a value on each factor after normalisation to zero mean and one standard deviation. Subjects were then allocated to one or other value system based on their highest factor score.

6.2.6 DESCRIPTION OF VALUE TYPES

Three Black and four White value types were identified using this approach. The Black groups were named "Conservers", "Progressives" and "Laggers". Conservers formed 36% of the urban Black adult population. People in this group were religious and family oriented. They had a sense of national identity and pride, as well as a concern for the community. They also had a feeling of

emotional empathy with others. Conservers could thus be regarded as tending towards collectivism. Progressives represented 31% of urban Blacks. Their value system was more individualistic and self-centred. Physical health and self-improvement were priorities. People in this group were antagonistic to authority and sought sensation and novelty. They were thus in favour of change and risk, rather than stability. Progressives held liberal attitudes to the blurring of gender roles and sexual relations. Modern in their outlook, they embraced technology and change. This value system was typical of individualism.

One in every three urban Black adults (33%) belonged to the Lagger group where the value system was oriented to the present with little care or hope for the future. Values were characterised by aggression, aimlessness and violence. Stimulants, such as alcohol, drugs and tobacco, were used in the search for sensation and to relieve stress. Conspicuous consumption was a means of concealing inferiority and achieving status, despite a shortage of funds (Veblen, 1899/1970). This value system is individualistic, extravert and outer-directed, lacking in finesse and sophistication.

The White value types were named "Innovatives", "Responsibles", "Brandeds" and "Self-Motivateds". Innovatives, who represented 24% of the urban population, were highly individualistic, rejecting authoritarian, religious and traditional values. They could thus be considered as being open to change. In many respects they shared the same values as the Black Progressives. Living was essentially for the moment and themselves. Status was achieved through ownership of goods, rather than achievement. Responsibles formed 25% of urban Whites. As their name suggests, they tended towards traditional values and collectivism. Caution and a reluctance to accept change and new ideas typified their lives. Partly this is because they are the oldest (see Figure 6.1) and poorest of the four types with the lowest standard of education.
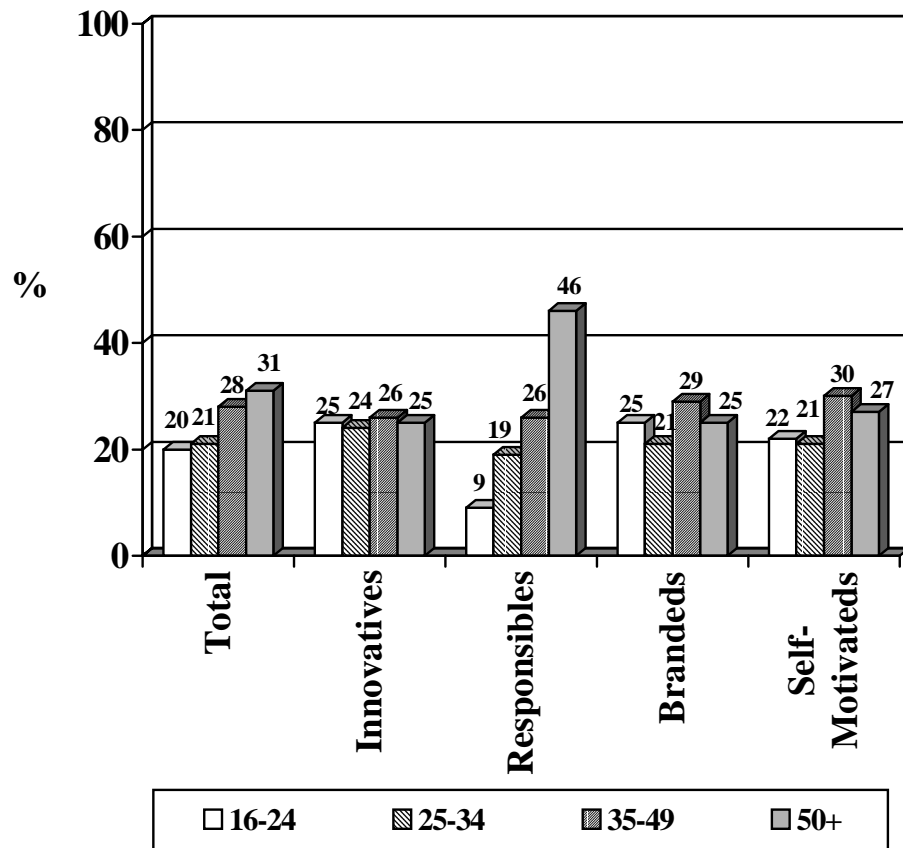
Figure 6.1. Demographics of White value groups – Age (Market Research Africa, 1995a).

Responsibles, like Black Conservers, had a strong sense of family and national identity and the desire for stability, combined with a respect for authority.

One in every four urban White adults was classified as Brandeds (25%), by far the most materialistic and status conscious of the four groups. They shared with the Innovatives the desire to flaunt their possessions, but had less money to achieve this. Convenience was also relevant, as less effort would be required. Self-Motivateds formed 26% of urban White adults. Their values tended towards emancipation. The blurring of gender roles, a belief that sexual matters was the personal concern of the participants and not society, together with a desire for racial harmony, formed a set of values that strongly conflicted with the mores of the moment. Financially better off and with higher education than the other White groups, the Self-Motivateds espoused a more

enlightened perspective of society than existed among the majority of urban White adults in the mid 90's. The Brandeds held corresponding values to the outer-directed and the Self-Motivateds to the inner-directed types of Mitchell (1979, 1981).

6.3 COMMON BLACK AND WHITE TYPOLOGY

Twenty-four of the values measured by Sociomonitor among both Blacks and Whites, which could be regarded as common to humankind, were identified as possible manifestations of the major dimensions of a shared value system: Adding Beauty, Blurring of the Sexes, Consumerism, Convenience, Economy Mindedness, Emotional Empathy, Familism, Liberal Sex Attitudes, Living for Today, Meaningful Work, National Identity, Novelty and Change, Orientation to the Past, Personalisation, Personal Creativity, Physical Health, Racial Harmony, Rejection of Authority, Rigidity, Self Enhancement, Self Improvement, Sensation Seeking, Status, Use of Stimulants.

These values were assigned to the major hypothesised dimensions of individualism versus collectivism and inner- versus outer-directed in terms of their best fit on theoretical grounds (see Table 6.1). Definitions of these common humankind values are provided in Appendix A.

Values assigned to individualism indicated a self-centered rejection of the collective status quo and a preparedness to take risks. Collectivism was characterised by values that reflected caution, together with a desire for the security and comfort of a stable environment. In return the self was subjugated to the well-being of the group.

Inner-directed values were concerned, from a personal and intellectual viewpoint, with the development of the self and society. These were opposed to the more basic and blatant values hypothesised as indicators of outer-directed.

Table 6.1

Values postulated as manifestations of major dimensions/facets

----

Individualism

      Liberal Sex Attitudes (LibSex)

      Living for Today (LivTod)

      Novelty and Change (NovCha)

      Rejection of Authority (RejAut)

      Sensation Seeking (SenSek)

      Use of Stimulants (UseSti)

Collectivism

      Consumerism (Consum)

      Economy Mindedness (EcoMin)

      Emotional Empathy (EmoEmp)

      Familism (Famlsm)

      National Identity (NatIde)

      Orientation to the Past (OriPas)

      Racial Harmony (RacHar)

      Rigidity (RigDty)

Inner-directed

      Adding Beauty (AddBea)

      Blurring of the Sexes (BluSex)

      Meaningful Work (MeaWor)

      Personal Creativity (PerCre)

      Physical Health (PhyHea)

      Self Enhancement (SelEnh)

      Self Improvement (SelImp)

Outer-directed

      Convenience (Conven)

      Personalisation (Person)

      Status (Status)

The various steps in the analysis procedure used in the search for a common Black and White typology were as follows.

6.3.1   COMBINING BLACK AND WHITE DATABASES

The Black and White databases of 2,005 and 2,003 respondents respectively, representing 8,212,000 Black and 3,599,000 White urban adults, were combined to give a total sample of 4,008 representing 11,811,000 people.

The individual scores for Blacks and Whites, on each of the 24 common values, were standardised separately to zero mean and unit standard deviation, in order to reduce any possible cultural biases.

6.3.2 CORRELATION OF VALUE SCORES AND POSITIONING ON MULTIDIMENSIONAL (MMDS) MAP

The identical procedure was applied to the total combined Black and White database as had been used for Blacks and Whites separately (6.2.5 Analysis of Values).

6.3.3 LOCATING BLACK AND WHITE RESPONDENTS ON THE MMDS MAP

For each respondent, using all their standardised value scores and an algorithm developed by the author for this purpose, their barycentre was established on the combined value map.

It may be helpful in the comprehension of this procedure to use an analogy. Imagine that the map of values is actually a tray, and furthermore where each value is located on the map there is a wine glass. For each individual person the quantity of wine in the glasses on their tray is equivalent to their standardised value scores. If a subject has a very high score on a particular value then the glass positioned where that value is on the map will be nearly full. If, on the other hand, for another value the score was very low, then the glass representing that value, at its position on the map, would be practically empty.

Let us now imagine that a highly skilled waiter is carrying the tray of glasses representing the scores for one of our subjects (see Figure 6.2). If we could locate where the waiter could balance the tray on a single finger, then we can position where this respondent falls on both the horizontal and vertical axes, represented by the tray map. This is in fact the barycentre. A similar procedure had previously been used by Corder (1990, 1993) to trace the changes in Black and White typologies and to forecast their composition and size at the year 2000.

Figure 6.2. Symbolic visualization of a respondent's position on the 'metric multidimensional map'
(C.K.Corder, 1993).

The formula the author developed for locating the waiter's finger on the horizontal and vertical axes was as follows:

$$X, \text{ or } Y = \frac{\sum_{k=1}^{n} D\,k. - V\,k}{\sum_{k=1}^{n} V\,k}$$

Where:

X = The position on the horizontal axis
Y = The position on the vertical axis
D = The distance of a glass on the horizontal, or vertical axis
V = The volume (equivalent to the value score) in a glass
n = The number of glasses

Each Black and White respondent now had a position on the horizontal and vertical axes of this tray map, derived from the position of their barycentre, which reflected the intensity of their individual scores on the 24 common values. Respondents were in effect positioned in an entirely new space that has been created in the middle of the original value tray. This is because the barycentres, where the waiter balanced each subject's tray, were located towards the middle of the glasses on the tray map.

6.3.4 LOCATION OF VALUES IN TWO DIMENSIONAL SPACE

Each individual was then allocated to quartiles on each of the common values according to their value scores. Figure 6.3 shows the mean position on the horizontal and vertical axes of those in the top quartile for each value.
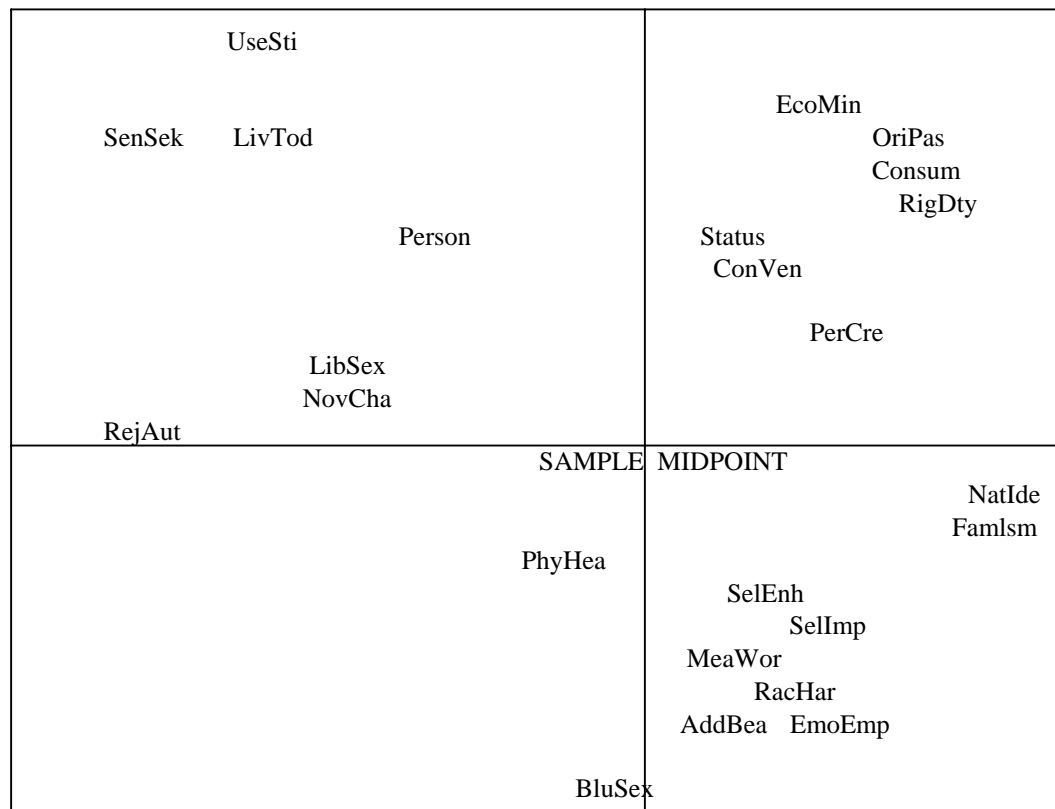
Figure 6.3. Black and White Sociomonitor value map (Market Research Africa, 1995b).

On the horizontal axis of the map the values of Sensation Seeking (SenSek), Rejection of Authority (RejAut), Living for Today (LivTod) and Liberal Sex (LibSex), which are related to the individualism dimension, are to be found on the left. On the right of the map are Familism (Famlsm), National Identity (NatIde), Rigidity (RigDty) and Orientation to the Past (OriPas), all of which are manifestations of collectivism. On the vertical axis the outer–directed values of Status (Status), which incorporates materialism, and Personalisation (Person), the use of particular brands and products that enable the individual to project the desired image, are to be found towards the top of the map. In contrast, the inner-directed values of Self Enhancement (SelEnh) and Self Improvement (SelImp) are to the bottom of the map. In the same space is Blurring of the Sexes (BluSex), an indication of the emancipation of South African society.

6.3.5   SEARCH FOR UNDERLYING STRUCTURE

The correlation of the individual total scores on each of the 24 common values was used as input for principal factor analysis with varimax rotation. This was done in order to see if there was a meaningful underlying structure through the reduction of the number of dimensions (Anastasi, 1976; Cattell, 1950; Cattell, 1952; Cattell et al., 1970; Eysenk, 1952).

Three, four, five and six factor solutions were examined. Based on meaning and parsimony the three-factor solution was adjudged the most appropriate. Each respondent was then allocated to one or other factor group, according to their highest score on each of the three factors, thus providing groups of Blacks and Whites who shared common values. These groups, or types, were named: "Self-Gratifiers", located towards individualism and outer-directed, "Traditionals", who were outer-directed and strongly inclined to collectivism, "Emancipateds", who were inner-directed and also more towards collectivism, but less so than the Traditionals (see Figure 6.4). The location of each group on the map is based on its mean position on the horizontal and vertical axes.

SELF-GRATIFIERS (33%)	TRADITIONALS (32%)
	SAMPLE MIDPOINT
	EMANCIPATEDS (35%)

Figure 6.4. Location of Black and White common value types on value map (Market Research Africa, 1995c).

6.3.6 DESCRIPTION OF THREE BLACK AND WHITE COMMON VALUE TYPES

One urban Black and White adult in every three (33%) was classified as Self-Gratifiers. Those in this group shared an above average propensity to take risks and seek out new sensations. They tended to live for the moment, desiring change and the unusual. An interest in improving their position in life through enhanced appearance or knowledge was low. Stimulants, such as alcohol, drugs and tobacco, were used to feel good and to help cope with life's difficulties. Conspicuous consumption, rather than personal achievement, established personal identity.

Traditionals formed 32% of urban Blacks and Whites. The lives of people in this group were dominated by conformity to rigid norms and mores. This group was the poorest, oldest and least well-educated, with one person in every four not having completed primary school. Religious and home activities were major interests. Status in the community and the possession of material

goods were also important. The Traditionals had the highest incidence of Whites (38%), probably because a greater proportion of urban Whites were in the older age groups.

The Emancipateds represented 35% of urban Blacks and Whites. Individuals in this group combined loyalty to family and country with a high degree of self-interest. Looking good, being healthy and improving oneself through further learning were combined with the desire to have a job that was more than just a means of earning a living. There was strong acceptance of the blurring of sexual roles and the emancipation of women. Harmony between the different races of South Africa was a shared value.

Proposition 6.1
South African Blacks and Whites share values that could be regarded as common to humankind.

Proposition 6.2
The values of Blacks and Whites can be placed along two dimensions individualism versus collectivism and inner- versus outer-directed.

Proposition 6.3
The underlying value systems of Blacks and Whites are similar in most cases.

6.4   CHAPTER SUMMARY

In this chapter a description has been given of a method used in Sociomonitor to measure the values held by urban South African Blacks and Whites during the period 1976 to 1996. Considerable differences were found in the underlying value systems of Blacks and Whites during this period and this was demonstrated by the results of the 1995 study. However, when only values that could be regarded as held universally were compared, it was found that Blacks and Whites shared many of these. It was also discovered that the underlying value systems were similar for the two racial groups.

The next chapter brings together various propositions that have been formulated into a theoretical framework.

CHAPTER 7

THEORETICAL MODEL OF THE DIMENSIONS OF A MULTI-ETHNIC SOUTH AFRICAN TYPOLOGY

7.1   INTRODUCTION

In this chapter a theoretical framework for a common typology of South African adults is described. The parameters and likely demographics of those who are strong on collectivism or individualism and those who are inner- or outer-directed are given, based on the propositions in previous chapters. The number of types is conjectured.

7.2   HYPOTHESISED DIMENSIONS OF SOUTH AFRICAN SOCIAL VALUES

There are two major dimensions that underlie values, collectivism versus individualism, which is expected to explain most of the variance, and inner-directed versus outer-directed. These two dimensions are orthogonal to each other (see Figure 7.1).
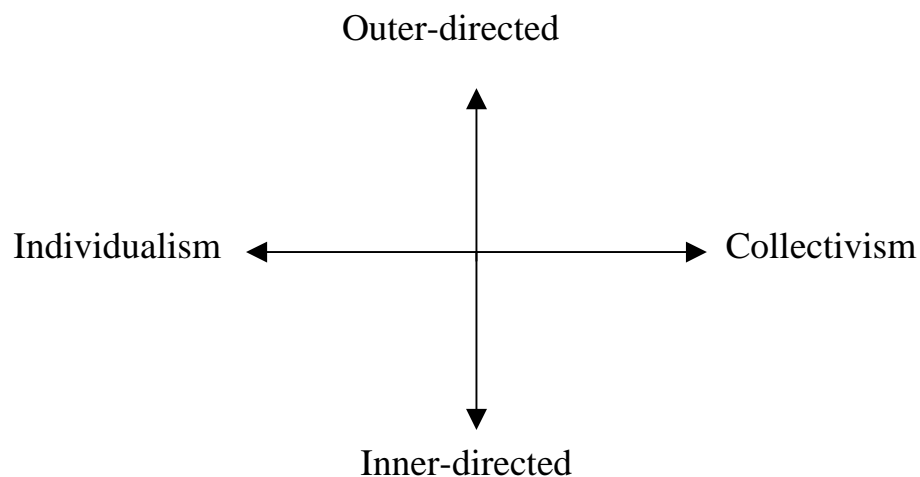
Figure 7.1. The two major dimensions of social values.

It is probable that the collectivism versus individualism dimension will be the more significant of the two dimensions, in view of its long-standing acknowledgement and appreciation, as compared to inner- versus outer-directed (see Chapters 2 & 3).

It is also anticipated that the relationships between these dimensions would be in the form of a polar spatial pattern, or 'wedgelike regions emanating from a common origin' (see Figure 1.3 & Levy, 1985).

7.3   CHARACTERISTICS OF THESE TWO DIMENSIONS

Based on the propositions made in Chapters 2 - 6, a number of parameters and demographic characteristics of these two major dimensions are hypothesised (see Tables 7.1 - 7.4). The differentiating aspects are not exclusive to one dimension or another, but are areas where, on the basis of previous research and theoretical grounds, it is anticipated that there would be a higher probability of occurrence.

Table 7.1

Hypothesised value parameters of collectivism and individualism

----

Collectivism	Individualism
Gemeinschaft	Gesellschaft
Altruistic/Ubuntu precepts more probable, - regard for nature as resource	Egoistical/Self-interest - disregard for nature as resource
Communal enterprise - limited personal freedom - conflict with employers (Trade Unions) - threatened by individualism	Private ownership - more individual freedom - harmony with employers
Traditional norms and mores - inequality - chauvinistic - community involvement	Modern viewpoint - egalitarian - emancipated

Loyalty to group structures, country and family
- desire for law and order
 	
- resistance to change
	Loyalty to self, networks
	- less respect for authority, but
	  require group approval
	- at forefront of change, attracted
	  by novelty

Religious - church music	Irreligious
Tolerant, less conflict between values	Violent and aggressive, more conflict between values
Simple lives - independent of time - few interests - limited range of social activities - limited range of media usage	Complex lives - driven by time - many interests - extensive social life - broad range of media usage
Entitlement - free education, jobs, housing	Individual resourcefulness - knowledgeable, keep up-to-date access to Internet, read more
Residuals of Black Consciousness	

African Humanism would be between collectivism and individualism, but closer to the

former.

Table 7.2

Hypothesised demographic characteristics of collectivism and individualism

----

Collectivism	Individualism

Black	White
Female	Male
Lower education	Higher education and qualifications
Older	Younger
Poorer	Richer
Disadvantaged	Economically powerful
Larger families and family ties	Independent people and smaller families
Rural and small urban	Metro areas
Employed by state and large concerns	Private enterprise, smaller concerns, self-employed, professional

----

It is expected that recent arrivals in urban areas will be in transition between collectivism and individualism, particularly people in poor circumstances, such as those living in backyard shacks and squatter camps.

Table 7.3

Hypothesised value parameters of inner- and outer-directed

Inner-directed	Outer-directed
Introversion	Extraversion
Internal locus of control	External locus of control
- self-fulfilment	- warm relationships
- self-respect	- well respected
- sense of accomplishment	- security, sense of belonging
Personal achievement	Conspicuous consumption
	- use of credit
	- cars and clothing signs of success
Post-materialism	Materialism
Self-evaluation	Seeks approval
Meaningful work	Financial reimbursement
- personal relationships	- union membership
- personal satisfaction	- job protection
Self-realisation and Self-enhancement	Group-realisation
- positive to occupation	
- positive to life in general	
- effort to succeed	
Attractive environment important	Practicalities
Change	Stability
Religious	
Multiple sensory activities	Few sensory activities
Intellectual activities	Spectator activities
Print media stronger	Electronic media stronger

It is hypothesised that inner- and outer-directed would be found among adults from all main population groups.

Table 7.4

Hypothesised demographic characteristics of inner- and outer-directed

----

Inner-directed   **Outer-directed**

Female   Male

Good education   Poor education
Financially more secure, can afford   Financially less secure, so greater
to look inwards   need to look outward

Urban   Rural

White   Black

Infants, young children and older

People at home

A summary framework of the demographics and parameters of the two major value dimensions related to a possible common social structure for South African adults is shown in Figure 7.2. Only the general area of location is given.

Materialism Convenience

Financial reimbursement Male

External locus of control Conspicuous consumption

Outer-directed

Younger/Male Older/Female
Wealthier/More qualified Poorer/Limited education
Emancipated/Equality/Liberal Traditional/Chauvinistic
Future Past
Gesellschaft Gemeinschaft

Individualism Collectivism

Self/Independent Dependent/Group
Change/Risk Stability/Security/Order
Egoistical/Self-centred Altruistic/Ubuntu
Urban/Time driven Rural roots/Event driven
Complexity/Multifarious life Simplicity/Media/Products

Inner-directed

Internal locus of control Personal achievement

Meaningful work Female

Post-Materialism Effort

Figure 7.2. Framework of common social structure.

It is anticipated that if underlying value structure of all racial groups in South Africa was similar then within this framework it would be possible to identify groups, or types, of people who shared common value systems. However, it is to be expected, in view of cultural, economic, social and political considerations, that Whites, Coloureds and Indians would be more alike.

7.4 HYPOTHESISED NUMBER AND NATURE OF TYPES

It could be likely, based on the work of Rousseau (1995) among Coloureds and White households in Port Elizabeth and Market Research Africa (MRA) (1995a) among urban Whites, that four types, Collectivists, Individualists, Inner-directeds and Outer-directeds could exist in urban areas among these two racial groups (see Table 7.5).

Table 7.5
Hypothesised value types - urban Coloureds and Whites

Collectivists	**Individualists**
MRA, 1995a. Responsibles	MRA 1995a. Innovatives
Rousseau, 1993. Home centred	Rousseau 1993. Trend setters
Inner-directeds	**Outer-directeds**
MRA, 1995a. Self-Motivateds	MRA, 1995a. Brandeds
Rousseau, 1993. Inner-directed	Rousseau. 1993. Outer-directed

----

The inclusion of Indians with Coloureds and Whites would be unlikely to have a significant impact on these types in view of their high degree of urbanisation and small population size. However, the addition of the very large Black population, which is evenly spilt between urban and rural areas (South African Advertising and Research Foundation, 1998), would almost certainly have an influence on the number and character of the types that were common to a more diversified universe. Five types, in the most recent Reaching Critical Mass survey of urban and rural Blacks, were identified within this population group on its own (South African Broadcasting Corporation, 1991). Two of these the Endurers and Resigneds were predominantly rural and traditional, the Emancipateds and Materialists were both progressive and urban, whereas the Transitionals were in-between. When consideration was given to the combination of urban Blacks and Whites, three types were evident (Market Research Africa, 1995c). The first type, Self-Gratifiers, were highly inclined to individualism and outer-directed; the second type, Traditionals, were outer-directed and in favour of collectivism; while the third type, the Emancipateds, were inner-directed and leaned to collectivism, rather than individualism. The addition of rural Blacks would be likely to add a fourth type, with strict adherence to traditional customs, and probably a fifth transitional type (see Table 7.6 & Figure 7.3).

Table 7.6

Hypothesised value types - urban and rural South African adults

----

Type 1
MRA (1995c). Self-Gratifiers

Type 4
SABC, (1991). Endurers and Resigneds

Type 2
MRA, (1995c). Traditionals

Type 5
SABC, (1991). Transitional

Type 3
MRA, (1995c). Emancipateds
SABC, (1991). Emancipateds

Materialism   Convenience

Financial reimbursement   Male

External locus of control   Conspicuous consumption

Outer-directed

Type 4

Younger/Male   Older/Female
Wealthier/More qualified   **Type 1**   Poorer/Limited education
Emancipated/Equality/Liberal   **Type 2**   Traditional/Chauvinistic
Future   Past
Gesellschaft   Gemeinschaft

Type 5

Individualism ⟷ **Collectivism**

Self/Independent   Dependent/Group
Change/Risk   Stability/Security/Order
Egoistical/Self-centred   Altruistic/Ubuntu
Urban/Time driven   **Type 3**   Rural roots/Event driven
Complexity/Multifarious life   Simplicity/Media/Products

Inner-directed

Internal locus of control   Personal achievement

Meaningful work   Female

Post-Materialism   Effort

Figure 7.3. Hypothesised location of five value types within a common value framework.

7.5   CHAPTER SUMMARY

In this chapter the theoretical framework for the values of South African adults has been provided in the form of the anticipated parameters of two orthogonal dimensions collectivism versus individualism and inner- versus outer-directed. It was anticipated that, if a common typology could be identified, it was probable that there would be five types. The barycentre of these types has been located within a common value framework.

In the next chapter the method and findings of Sociomonitor 1997/8, a comprehensive study of values among the total adult population of South Africa, are given.

CHAPTER 8
RESEARCH DESIGN

8.1 INTRODUCTION

In this chapter a detailed description is given of the development and execution of Sociomonitor 1997/8, a single source data set measuring values, lifestyle, media consumption, product usage and demographics. It is noted that the approach to the measurement of values was the same as that used in previous Sociomonitors (see Chapter 6). However, a characteristic of the latest survey was that an identical questionnaire was employed for all population groups, unlike previous studies where the primary focus had been on urban Blacks or Whites.

8.2 DEFINING VALUES

A research project team was formed consisting of two male psychology graduates, one Black the other White and two White female graduates, both of whom had extensive previous experience of the Sociomonitor, and the author.

The team's main task was to identify and define the main values of South African adults that would be of relevance to marketers, media owners and decision-makers. Data from previous research surveys done by Market Research Africa in South Africa, the Research Institute on Social Change in various European countries, as well as qualitative assessments of trends and scenarios were taken into consideration (Market Research Africa, 1995a, 1995b, 1995c; Popcorn, 1991; Popcorn & Marigold, 1996; Research Institute on Social Change, 1996, 1998; Toffler, 1971, 1980, 1984).

The values were conceptualised within the hypothesised two-dimensional framework (see Figure 7.1). The likely location of the barycentre of each value was recorded in the framework, in order to identify possible omissions.

During the discussion of values and how they should be defined, it became apparent that it would

be necessary to differentiate between deep-seated values, topical issues that could in the longer term become values and marketing trends, some of which were already values. A total of 32 values were identified, 7 issues and 10 marketing trends, 6 of which were also values. Definitions for each value, issue and marketing trend are given in Appendix B. Acronyms and brief descriptions are provided in Table 8.1.

A number of values that had been covered in Sociomonitor 1995, but only measured among one racial group, were considered to be relevant to the whole of South African society. These were Achievement (Whites, Sociomonitor 1995), Belonging and Approval, Cultural Customs, Religion, Violence and Aggression (Blacks, Sociomonitor 1995). Previously Status and Materialism as one value had been measured among Whites and defined as seeking status and admiration through material possessions, expensive items or display of qualifications. Among Blacks, Materialism had been measured on its own and defined as the desire to have more and better possessions and to make more and more money, in order to demonstrate one's social position. It was decided that Materialism and Status were two separate values and both were included.

It was reasoned that Ubuntu should also be added, as it was a way of life that was followed by many Blacks and possibly others in South Africa (see 2.5 Ubuntu and African Humanism). There were also a number of initiatives to introduce this philosophy to business management and the corporate environment (Khosa, 1994 ; Mbigi, 1977). A further new value African Customs was added, as it was deemed that there was a need to differentiate this from Cultural Customs. African Customs originated from Africa and could be subscribed to by anyone living in South Africa, whilst Cultural Customs applied to cultures from any origin.

In reviewing consumer behaviour and marketing activity in South Africa and elsewhere evidence of the importance of branding and do-it-yourself (DIY) led to the incorporation of Brand Extrinsics and DIY as additional values and marketing trends.

Four values that had formed part of the set of twenty-four values common to humankind (see 6.3 Common Black and White typology & Appendix A) were omitted: Consumerism, Convenience, Personal Creativity and Rigidity. It was considered either that they were of less relevance than they had been previously, or that the extended range of values, issues and marketing trends now being covered incorporated the important aspects of their definitions.

Table 8.1
<u>Acronyms and brief descriptions of values, marketing trends and issues</u>

ADDBEA - adding beauty (VALUE)
ACHMNT - achievement (VALUE)
AFRICU - African customs (VALUE)
AIMLES - aimlessness (VALUE)
BELAPP - belonging and approval (VALUE)
BLUSEX - blurring of the sexes (VALUE)
BRDEQI - brand equity (MARKETING)
BRDEXT - brand extrinsics (MARKETING + VALUE)
COMDEV - community development (ISSUE)
CULCUS - cultural customs (VALUE)
CUSREL - customer relations (MARKETING)
DOSELF - do-it-yourself (MARKETING + VALUE)
ECOMIN - economy minded (MARKETING + VALUE)
EMOEMP - emotional empathy (VALUE)
ENTITL - entitlement (ISSUE)
ENVCON - environmental consciousness (ISSUE)
FAMLSM - familism (VALUE)
FEACRI - fear of crime (ISSUE)
IMMEDI - immediacy (MARKETING)
LIBSEX - liberal sex attitudes (VALUE)
LIVTOD - living for today (VALUE)
MATLSM - materialism (VALUE)
MEAWOR - meaningful work (VALUE)
NATIDE - national identity (VALUE)
NICMAR - niche marketing (MARKETING)
NOVCHA - novelty and change (MARKETING + VALUE)
OPTIMI - optimism (ISSUE)
ORIPAS - orientation to the past (VALUE)
PERSON – brand intrinsics (MARKETING + VALUE)
PHYHEA - physical health (VALUE)

PROTST - protest (ISSUE)
RACHAR - racial harmony (VALUE)
REJAUT - rejection of authority (VALUE)
RELTEC - relate to technology (MARKETING + VALUE)
RETNAT - return to nature (ISSUE)
RLGION - religion (VALUE)
SELENH - self-enhancement (VALUE)
SELIMP - self-improvement (VALUE)
SENSEK - sensation seeking (VALUE)
STATUS - status (VALUE)
UBUNTU - Ubuntu (VALUE)
USESTI - use of stimulants (VALUE)
VIOAGG - violence and aggression (VALUE)

8.3 THE MEASURING INSTRUMENT

The measuring instrument was similar to that used in previous studies (see 6.2 1 The measuring instrument). The major difference was that the identical questionnaire was used for all population groups. After the project team had defined each of the values, issues and marketing trends, in terms that could apply to all South African adults, a set of appropriate questions was developed to measure each definition. For example, Ubuntu was conceptualised as "a way of life incorporating community involvement, respect and empathy for others, adherence to traditions, and accordance of dignity to others". A series of seven statements related to this definition were devised:

1   The values of my cultural group are important to me

2   Young people should respect older people, community leaders and teachers

3   You trust others, because others trust you

4   People who can identify with other people's feelings

5   In your community, people look out for you because you look out for them

6   A person is a person through others

7   People should be judged on the goodness of their deeds

These statements were then allocated to different question frameworks. Statements 1 and 6 were

asked in the context of whether respondents considered them to be "Very true", Fairly true", Fairly untrue" or "Very untrue"; statements 2, 5 and 7 as to whether they "Completely agree", "Partly agree", Partly disagree" or "Completely disagree"; statement 3 as to whether it was "Very important", Fairly important", "Not so important" or "Not at all important" and statement 4 as to whether it "Completely", "Quite well", "A little" or "Not at all" fitted in with their own ideas and feelings. There were two further framework options for other definitions. The first was a choice between two alternatives, which was then followed up with the request to say whether this had been an easy or difficult decision. The second was the personal identification with different types of people as to whether they were thought to be "Very similar", Fairly similar", "Rather different" or "Very different" to oneself. The statements selected to measure the definitions of the marketing trends, issues, and other values were allocated across a mix of these 6 question frameworks (see 6.2.1 The measuring instrument).

In addition to the measurement of values, issues and marketing trends, the questionnaire covered detailed demographics, lifestyle, product and brand usage. Since the sample for Sociomonitor 1997/8 was taken from a sub-sample of AMPS it was also possible to link the two data sets (see 8.5 Sample).. This provided additional information on media and product usage, stage of life and LSMs (see 5.5.6 Segmentation by living standard and Smit & Montgomery, 1991).

8.4   UNIVERSE

The universe for the 1997/8 Sociomonitor comprised adults, aged 16 years and over, living in private households, hostels and residential hotels in the Republic of South Africa. Excluded from the universe were residents and staff of such institutions as prisons and hospitals, military personnel on active service, and, within each racial group, minority sub-populations in certain geographical areas. The estimated size of the total adult population based on projections from the 1992 Census was 26,030,000, of which 309,000 were excluded, representing 1.2% of the total (see Table 8.2 and South African Advertising Research Foundation, 1998). The nine provinces of South Africa have been abbreviated in Table 8.2 as follows: EC = Eastern Cape, GP =

Gauteng, FS = Free State, KZ = KwaZulu Natal, MP = Mpumalanga, NC = Northern Cape, NP = Northern Province, NW = North West, WC = Western Cape.

Table 8.2
Sub-populations excluded

Racial group	Provinces affected Wholly	Partly	Population Total '000	'000	Excluded %
Blacks		WC.	18,979	136	0.7
Coloureds	FS. MP. NP. NW	KZN. GP	2,297	121	5.3
Indians	WC. NC. FS. EC. MP. NP. NW.	GP.	729	52	7.1
Whites			4,025	-	-
TOTAL			26,030	309	1.2

8.5   SAMPLE

A sub-sample of the AMPS 1997 survey was used for a radio diary panel and the same respondents took part in the Sociomonitor 1997/8 survey. A description follows of the procedures for drawing the basic AMPS sample, as well as the way in which the sample was drawn (South African Advertising Research Foundation, 1997).

8.5.1   AREA-STRATIFICATION

The population was stratified by area in order to increase precision. When a population is heterogeneous, as is the case in South Africa, stratification divides the population into groups that are more homogenous (Loubser, 1996). Area stratification also ensures the correct proportions of people from different regions. This is particularly important when measuring the usage of media

and many other aspects of consumer behaviour, such as banking and shopping, which are determined, or influenced, by geographical location. Stratification can result in a more efficient estimation of the characteristics of a population where the means between strata differ (Barnett, 1982).

8.5.2 SELECTION OF COMMUNITIES

All metropolitan areas and urban communities with a combined all race population of 100,000, or more, were included in the sample.

Within province, other urban communities were first listed, in alphabetical order, within the total population size categories "40,000 – 99,999", "8,000 – 39,999", "4,000 – 7,999", "500 – 3,999" and less than "500". These communities were further allocated to statistical regions and their populations cumulated. Sampling points were then systematically drawn using a fixed interval after a random start. The sampling interval was determined by dividing the required number of sampling points within each population size category. At each point two dwellings were selected.

The sample was allocated to each province and within province to Magisterial districts pro-rata to population, on the basis of 1996 population estimates.

8.5.3 SELECTION OF RESPONDENTS' ADDRESSES

In both urban and rural areas the selection of addresses of respondents was done by two different methods.

8.5.3.1 Urban communities covered by the Household Register

The residential addresses of dwellings in most urban communities are listed in Market Research Africa's computerised Household Register, which has over 3,150,000 dwellings. For each urban

community addresses are arranged alphabetically by suburb and within suburb by street name. Sampling points, each with two non-adjacent addresses, were drawn from this Household Register using systematic sampling in every urban community with a combined all race population of 100,000 or more, and from systematically selected other urban communities.

8.5.3.2 Urban communities not covered by the Household Register

For a few urban communities that were not covered by the Household Register, a sampling interval was determined, community by community, by dividing the estimated number of dwellings by the required number of sampling points. A starting point was chosen and the street where every ith dwelling fell was identified. Interviewers then found a dwelling in that street that had a randomly assigned final digit. This address was then taken as the one house of a sampling point and a further address two numbers away was selected as the other.

8.5.3.3 Formal farming areas

In formal farming areas the number of farms to be visited within a given Magisterial District was determined pro rata to population.

The requisite number of map references were then randomly selected and the two nearest farms chosen. One person was sampled at the main household at each farm.

The farms where farm workers were sampled were identified in the same manner. Two separate dwellings were taken from each sampled farm and one person was picked in each dwelling using a random selection grid.

8.5.3.4 Other rural areas

In other rural areas, the selection of rural dwellers was at the discretion of the leaders of the fieldwork teams, subject to these being within pre-designated geographical areas marked on maps. Senior supervisors following the teams checked on sample selection.

8.5.4   SELECTION OF RESPONDENTS IN SAMPLED DWELLINGS

In each sampled dwelling a male, or female, as designated beforehand, was chosen from the household. In cases where there was more than one person of the required gender, all adults 16 years and over of that gender were listed on a selection grid in order of age. One person was then chosen from those listed using a random selection grid (see Figure 8.1). If nobody of the required gender was living in the household, a substitute of the same gender was taken from a neighbouring dwelling.

COLUMN A	▲ INTERVIEW THE PERSON ENCIRCLED OPPOSITE THE NUMBER IN HOME UNDER COLUMN "A".				
NUMBER IN HOME	Oldest	2nd Oldest	3rd Oldest	4th Oldest	5th Oldest
0	-	-	-	-	-
1	1	-	-	-	-
2	1	2	-	-	-
3	1	2	3	-	-
4	1	2	3	4	-
5	1	2	3	4	5

Figure 8.1 Respondent Selection Grid.

This sampling procedure removes the selection of the respondent from the discretion of the interviewer. This avoids interviewer bias, whereby an investigator might arbitrarily decide whom to include in a sample, for instance, those that were readily available.

If the specified respondent could not be contacted after up to four calls on different days and times of day, a substitute of the same gender was taken. Substitute addresses were alternately those to the left or to the right of the originally selected dwelling.

8.5.5   DISPROPORTIONATE SAMPLING

In order to provide sub-samples with adequate bases for separate analyses of results, principally in relation to media with regional coverage, disproportionate sampling was applied. Certain urban areas were then allocated a sample more than their population representation (South African Advertising Research Foundation, 1998). Rural dwellers were underrepresented in the sample, as there is less heterogeneity in rural areas and because of field cost considerations.

8.5.6   SOCIOMONITOR 1997/8 SAMPLE SIZE

A sub-sample of 6,375 was taken from the AMPS 1997 diary panel. This was supplemented with a further 196 respondents in Metropolitan areas in order to increase representation where media usage was high. The final total sample was 6,571.

8.6   WEIGHTING TO POPULATION

The sample was grossed up to 25,721,000. The weighting cells used were gender, age (16-24, 25-34, 35-49, 50+), race (Black, Coloured, Indian, White), home language (Whites only: Afrikaans/both Afrikaans and English; English/other non-vernacular, such as French, Greek, Portugese), province and community (metropolitan, 250,000+; other urban, 500-249,999; rural, less than 500).

Details of the sample profile before and after weighting are given in Table 8.3. The change in the profile is due to the differential weights applied to the variables, in particular rural communities with populations of less than 500 adults which had been under-represented (see 8.5.5 Disproportionate sampling). The proportions of Nguni and Sotho/both respondents are shown before and after weighting, even though these languages were not used as weighting factors (ACNielsen MRA, 1998).

Table 8.3
Profile of the Sociomonitor 1997/8 sample, before and after weighting

Demographics		Before Weighting	After Weighting
		%	%
Gender	Male	49	48
	Female	51	52
Age	16-24	24	28
	25-34	22	26
	35-49	26	25
	50+	28	21
Race	Black	45	73
	Coloured	13	9
	Indian	8	3
	White	35	16
Province	Western Cape	12	10
	Eastern Cape	12	14
	Northern Cape	6	2
	KwaZulu Natal	15	21
	Northern Province	6	11
	Mpumalanga	5	7
	North West	8	8
	Gauteng	25	21
	Free State	10	7
Home Language	Afrikaans/both	36	16
	English/other	19	10
	Nguni*	22	41
	Sotho/both*	22	32
Community Size	250,000	42	32
	500 –249,999	40	26
	1-499	18	42

* Criteria, not weighting cells

8.7 METHOD

Personal interviews were done in the home. As this was a lengthy interview, an incentive was provided in the form of a gift voucher to the value of R50.00, or a useful item, such as a pen.

8.8 FIELDWORK

Fieldwork took place during October, November 1997 and January to March 1998. Trained, experienced investigators who were working under the control of field supervisors did the interviewing. A minimum 20% validation back check was done by mail, in person, or by telephone.

8.9 STANDARDS

Sociomonitor 1997/8 was carried out according to the Standards of Research of the Association of Marketing Research Organisations (AMRO, 1986) and the code of Conduct of SAMRA (Southern African Marketing Research Association, 1996).

8.10 CHAPTER SUMMARY

In this chapter, a description has been given of the method used for Sociomonitor 1997/8. An outline was provided of the way in which values, marketing trends and issues were measured. Other items investigated at the same time were listed. The universe for the study was defined together with the sampling and weighting procedures. The method and fieldwork were detailed.

In the next chapter details are given of the analysis procedures used for Sociomonitor 1997/8. Results are outlined that relate specifically to the theoretical model of a multi-ethnic South African typology depicted in Chapter 7, which was based on the various propositions formulated in Chapters 2 - 6.

CHAPTER 9

RESEARCH RESULTS AND COMPARISON WITH

THEORETICAL MODEL

9.1   INTRODUCTION

In this chapter the theoretical framework outlined in Chapter 7 is contrasted against the findings of Sociomonitor 1997/8. The statistical techniques used to identify value leaders and value types are outlined. Value leaders are positioned in a two dimensional framework, based on their correlations, and value types are located in the same space. This framework value space is then sub-divided into nine approximately equal sociographic cells that are grouped together for further analysis.

Results are evaluated against the hypothesis that there are two major dimensions of social values, individualism versus collectivism, and inner- versus outer-directed. South African adults were categorised into four groups "Individualism", "Collectivism", "Outer-directed" and "Inner-directed" and their characteristics analysed in detail to see if they matched the theoretical description given in Chapter 7. Five value types were identified in Sociomonitor 1997/8. These are described and compared against the multi-ethnic South African typology that was hypothesised in Chapter 7. It should be noted that the bases given in the tables are for the sample in each cell category prior to weighting. The weighted samples would be in line with the size of the sociographic cells given in figure 9.2

9.2   ANALYSIS OF VALUES

A similar procedure was followed for the analysis of Sociomonitor 1997/8 as had been used for Sociomonitor 1995 (see 6.2.5 Analysis of values), except that the results for all races were analysed as one data set. This was in line with the primary aim of the study to establish if a value based typology existed that could be applied to all South African adults (see 1.3.1 Purpose).

9.2.1 VALUE, ISSUE AND MARKETING TREND LEADERS

Based on the sum of the scores of the statements used to measure each value, issue or marketing trend respondents were classified into quartiles. Those who were in the top quartile were termed value, issue or marketing trend leaders

9.2.2 NORMALISATION AND CORRELATION

The scores on each value, issue and marketing trend were normalised to zero mean with one standard deviation for Blacks, Coloureds, Indians and Whites. This was done to reduce the bias that might have been caused by differences in the response to questions because of ethnic or other influences.

A correlation was then done of the normalised scores of the values for all respondents. This analysis was limited to values, as they were most relevant in the search for a common typology (see Appendix C - Correlation Matrix). The correlations ranged from - 0.4 to + 0.4, though for the most part they were between - 0.1 and 0.1. It is hypothesised that the reason the correlations are so low is because the values have been carefully defined as separate variables and measured using different types of questions related to various aspects of each definition (see 6.2.1 & 8.3 The measuring instrument). If the same scale is used throughout to measure values this can lead to high intercorrelations between the variables resulting in multicolinearity, which is obviated when correlations are low (Malhotra, 1999).

The highest positive correlations were between Achievement and Personalisation; Achievement and Self-Improvement; Achievement and Status; Brand Extrinsics and Materialism; Novelty and Change, and Self-Improvement; Self-Improvement and Status; Status and Ubuntu. The strongest negative correlation was for Religion, and Violence and Aggression. These correlations indicate a high degree of criterion validity.

9.2.3   MMDS VALUE MAP

The correlations between the values were transformed into distances by subtracting them from one. The resultants were converted by metric multidimensional scaling (MMDS) into a two dimensional map. On this map values with high correlations will tend to be close together and those with negative correlations far apart. Schwartz and Sagiv (1995), from a two dimensional representation of the correlations of 56 single values, came to similar conclusions. They further pointed out that the meaning of a value would be indicated by its relationship with others. However, it is possible for two values with a low correlation with each other to be spatially close together because of the similarity of their associations with other values.

9.2.4   LOCATING THE POSITION OF EACH RESPONDENT ON THE MMDS VALUE MAP

The barycentre of each respondent based on his or her value scores was then established using the formula developed by the author (see 6.3.3 - Locating Black and White respondents on the MMDS map). Thus each respondent had his or her own individual position in the two-dimensional value framework. It is now possible to identify the distribution and midpoint for any group of informants on any variable measured in the study.

The mean positions of the value leaders for all respondents are shown in Figure 9.1.

A comparison of the location of the value leaders for all South African adults and those limited to urban Blacks and Whites from the 1995 Sociomonitor shows that the majority of values that were measured in both surveys are in the same quadrant, or very close (see Figures 6.3 & 9.1).
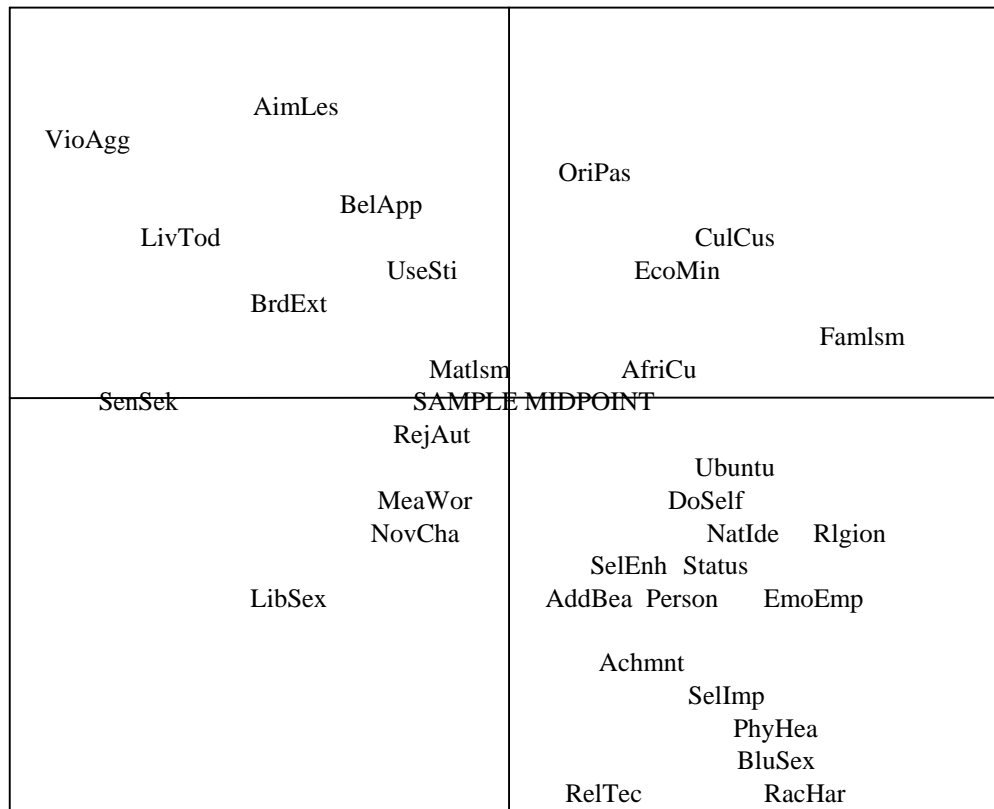
Figure 9.1. Sociomonitor 1997/8 Value Map (ACNielsen MRA, 1998).

9.2.5 SOCIOGRAPHIC CELLS

The two-dimensional value framework in which each respondent was positioned (see Figure 9.1) was partitioned into nine cells of approximately equal size. This was done by dividing the scores for all respondents on the horizontal and vertical axes of the value framework into three equal groups and then cross analysing these groups to make nine cells. The initial number of people in each cell was not exactly the same, as the distribution of respondents was not entirely symmetrical about the midpoint of the value framework space. Moving people from the larger groups to the smaller on the basis of their proximity evened out the size of the groups. The final distribution of the weighted adult sample in the nine cells is shown in Figure 9.2).
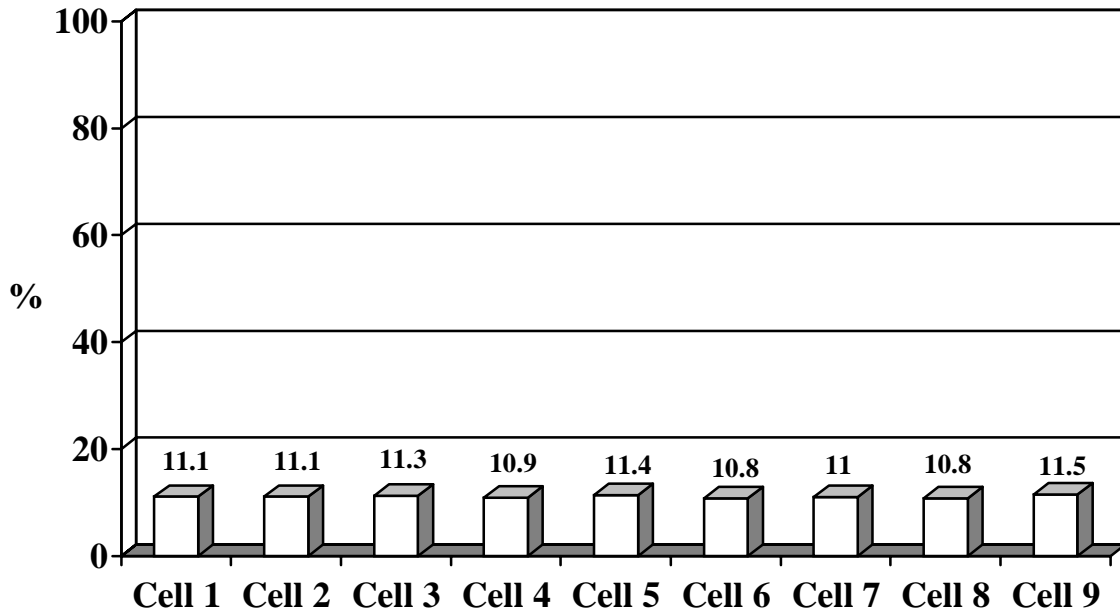
Figure 9.2. Size of sociographic cells (ACNielsen MRA, 1998).

The division of the framework value space into nine cells provides a means of comparing results within different cells, or groups of cells.

9.2.5.1 Classification of collectivism and individualism

Sociographic cells 1, 4 and 7; 2, 5 and 8; 3, 6 and 9 were combined to represent thirds along the horizontal axis that was hypothesised as being distributed along the individualism versus collectivism dimension (see Figure 9.3). Those in Third I were classified as falling into the category Individualism, those in Third II the In-betweens and those in Third III Collectivism.

Individualism	In-betweens	Collectivism
Third I	Third II	Third III
Cells 1, 4 and 7	Cells 2 ,5 and 8	Cells 3, 6 and 9
33%	33%	34%

Individualism ◄————————————————————► Collectivism
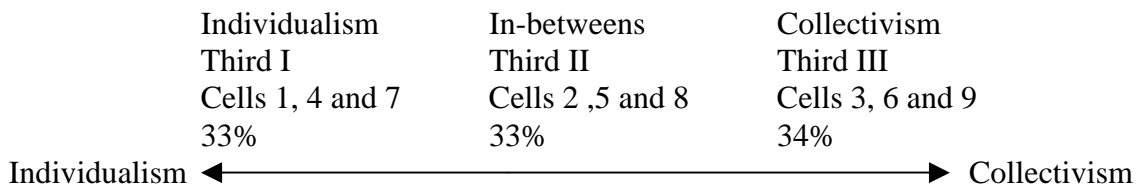
Figure 9.3. Distribution of sociographic cells on individualism versus collectivism axis.

9.2.5.2 Classification of inner- and outer-directed

Sociographic cells 1, 2 and 3; 4, 5 and 6; 7, 8 and 9 were combined to represent thirds along the vertical axis that was hypothesised as representing inner- versus outer-directed. Those in Third I were classified as falling into the Inner-directed and those in Third III into the Outer-directed category (see Figure 9.4).

Outer-directed

Third I
Cells 1, 2 and 3
33%

Third II
Cells 4, 5 and 6
33%

Third III
Cells 7, 8 and 9
34%
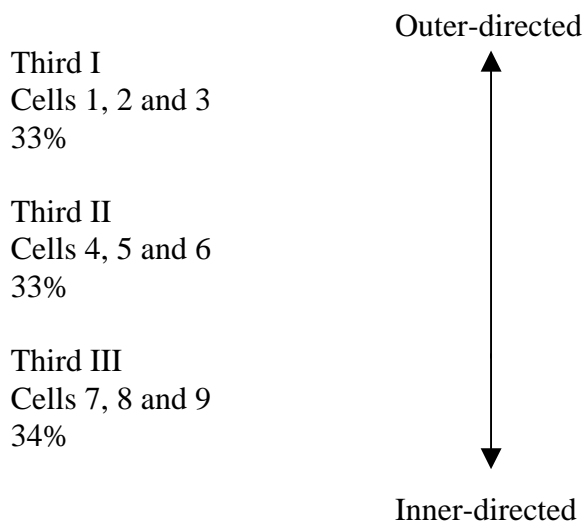
Inner-directed

Figure 9.4. Distribution of sociographic cells on inner- versus outer-directed axis.

9.3 THE DIMENSIONS OF SOUTH AFRICAN SOCIAL VALUES

An analysis was made of the Sociomonitor 1997/8 results to test the hypothesised underlying values and demographics of the two major dimensions (see Tables 7.1 - 7.4). Comparisons have been made between the findings pertaining to individualism (cells 1, 4 and 7) versus collectivism (cells 3, 6 and 9) and between outer- (cells 1, 2 and 3) versus inner-directed (cells 7, 8 and 9). Further analyses, where relevant, were done with the inclusion of the in-betweens (cells 2, 5 and 8) on the individualism versus collectivism axis.

The tables that follow are based on these sociographic cell groupings (see Tables 9.1 - 9.25). Chi-square contingency table results were applied. The majority of chi-square tests, which are based on the actual number of respondents of Sociomonitor 1997/8, are likely to be significant because of the large sample size. In order to get an indication of the chi-square strength of associations, phi coefficients were also calculated. Since the phi coefficient is proportional to the square root of the chi-square statistic divided by the sample size (Malhotra, 1999) they are perhaps lower for Sociomonitor 1997/8 than might be expected, given the considerable difference between many of the findings.

9.3.1 PARAMETERS OF COLLECTIVISM AND INDIVIDUALISM

The parameters of collectivism and individualism are given in Tables 9.1 - 9.13.

9.3.1.1 Value characteristics of collectivism and individualism

The incidence of value leaders for individualism and collectivism is given in Table 9.1. Chi-square contingency table tests of the results for individualism (cells 1, 4 and 7) and collectivism (cells 3, 6 and 9) show that all differences are highly significant. The phi coefficients for the chi-square tests between individualism (cells 1, 4 and 7) and collectivism (cells 3, 6 and 9) indicate that the strongest chi-square associations are for Violence and Aggression, Religion, Sensation Seeking and Familism (see Table 9.1).

The values of collectivism reflect conservatism. Adherence to African customs (AFRICU), the desire to preserve one's own culture, language, religion and ethnicity (CULCUS, RLGION), together with a nostalgia for the past and a resistance to moving with the times (ORIPAS) are strong indicators of an allegiance to traditional norms and the denial of individual freedom. The very low incidence of the use of violence and aggression in order to get one's own way and to dominate (VIOAGG) shows a tolerance to the values held by others. Identifying with being South African (NATIDE) and involvement with the family (FAMLSM) reflect the loyalty to group

structures. Despite the support for the conventional there is also the acceptance of an equal role for both men and women (BLUSEX) (see Table 9.1).

Ubuntu is attendant with collectivism and together with the major focus on family (FAMLSM), concern for neighbours (COMDEV) and an understanding and empathy with the emotions of others (EMOEMP) indicates a degree of altruism (see Tables 9.1 & 9.3). The strong belief that there should be racial harmony and integration (RACHAR) suggests that Black Consciousness no longer has as strong a following (see Tables 7.1 & 9.1).

There are marked differences in the values of individualism as compared to those of collectivism. Enjoyment and the pursuit of risky activities (SENSEK), living for the moment with no concern for the future (LIVTOD) and a rejection of convention and rules (REJAUT) depict a rebellious, self-centred and selfish nature that is in conflict with traditional values. This is further underlined by the strong inclination to violent and aggressive behaviour (VIOAGG), which represents a threat to the rest of society. More modern ideas about life and humanity are endorsed (LIBSEX), but the financial (ECOMIN) and other restraints that individuals place on themselves and consideration for others are lacking. The search for the new and the different (NOVCHA) point to the desire for change and the appeal of the unusual. There is however a sense of hopelessness, a lack of purpose (AIMLES) and a tendency to rely on stimulants or relaxants to boost one's confidence (USESTI). Despite the individual bravado and rebelliousness there is a need for approval and belonging (BELAPP).

Table 9.1

Incidence of value leaders for individualism and collectivism

	Individualism Cells 1+4+7	Collectivism Cells 3+6+9	Chi-square	Sig. Level	Phi
N =	2,100	2,814			
	%	%			
AIMLES	31	19	89.0	.000	.135
BELAPP	25	15	73.5	.000	.122
LIBSEX	40	13	489.1	.000	.315
LIVTOD	35	9	516.6	.000	.324
NOVCHA	27	21	25.8	.000	.072
REJAUT	35	18	179.8	.000	.191
SENSEK	55	9	1251.8	.000	.505
USESTI	30	20	67.1	.000	.117
VIOAGG	48	4	1351.4	.000	.524
AFRICU	13	35	306.2	.000	.250
BLUSEX	17	36	215.7	.000	.209
CULCUS	10	42	628.9	.000	.358
ECOMIN	12	38	425.6	.000	.294
EMOEMP	16	34	201.2	.000	.202
FAMLSM	8	43	721.9	.000	.383
NATIDE	15	37	279.7	.000	.239
ORIPAS	16	32	160.4	.000	.181
PERSON	17	32	125.4	.000	.160
RACHAR	13	36	314.6	.000	.253
RLGION	4	52	1261.7	.000	.507
UBUNTU	15	28	419.1	.000	.292

9.3.1.2 African Humanism

Ubuntu has been described as being synonymous with African Humanism (Nöthling & Ramotsei, 1998). It would seem that this philosophy is significantly stronger with both collectivism and with the in-betweens, who are midway between collectivism and individualism, than with individualism (see 2.5 Ubuntu and African Humanism and Table 9.2).

Table 9.2

Incidence of Ubuntu value leaders for individualism and collectivism axis

	Individualism Cells 1+4+7	In-betweens Cells 2+5+8	Collectivism Cells 3+6+9	Cells 1+4+7 and 2+5+8 Chi-square	Sig. Level	Cells 1+4+7 and 3+6+9 Chi-square	Sig. Level
N =	2,100	1,657	2,814				
	%	%	%				
UBUNTU	15	28	28	338.1	.000	419.1	.000

9.3.1.3 Society issues

There are significant differences between the incidence of society issue leaders for collectivism and individualism (see Table 9.3).

The interest and involvement with collectivism in the development and concerns of one's neighbourhood and community (COMDEV) is a manifestation of support for group organisations. The belief that the natural environment is being destroyed and action should be taken to ameliorate this (ENVCON) point towards a respect for nature and appreciation of its long-term benefits. A viewpoint not shared by individualism. Collectivism is also related to the conviction that one is a victim of circumstances and is owed (ENTITL) and that group protest is an effective way of getting what one wants (PROTST). Though these societal issues are not specifically related to any particular benefit they indicate a general feeling of entitlement (see Table 9.3).

Table 9.3
Incidence of society issue leaders for individualism and collectivism

----

	Individualism Cells 1+4+7	Collectivism Cells 3+6+9	Chi-square	Sig. Level	Phi
N =	2,100	2,814			

	%	%			
COMDEV	13	42	485.4	.000	.314
ENVCON	19	34	135.6	.000	.166
ENTITL	17	27	68.6	.000	.118
PROTST	18	27	54.8	.000	.106

9.3.1.4 Marketing trends

There was a significant difference between collectivism and individualism on the incidence of marketing trend leaders for Immediacy (see Table 9.4)

The higher desire for immediate need satisfaction with individualism shows that there is more awareness of time and it is more important than with collectivism (see Table 9.4).

Table 9.4
Incidence of marketing trend leaders for individualism and collectivism

----

	Individualism Cells 1+4+7	Collectivism Cells 3+6+9	Chi-square	Sig. Level	Phi
N =	2,100	2,814			

	%	%			
IMMEDI	26	21	20.1	.000	.064

9.3.1.5 Activities

A higher incidence of going to pop concerts, discotheques, nightclubs and casual parties with friends, signifies a more hectic social life is enjoyed with individualism. The preference for an evening at home with friends, or attendance at a community meeting and the lower participation

in sport build a picture of a more restrained existence for collectivism (see Table 9.5).

Table 9.5

Activities enjoy regularly for individualism and collectivism

	Individualism Cells 1+4+7	Collectivism Cells 3+6+9	Chi-square	Sig. Level	Phi
N =	2,100	2,814			
	%	%			
Casual party with friends	20	16	10.3	.001	.046
Playing computer games	6	3	22.5	.000	.068
Playing sport	18	11	55.4	.000	.106
Going to nightclubs	9	2	118.9	.000	.156
Going to disco's	8	3	67.4	.000	.117
Going to pop concerts	6	2	71.9	.000	.121
Eat out at restaurants	18	15	7.9	.005	.040
Playing cards/dice	10	8	8.8	.003	.042
Watching sports events with friends	26	16	74.9	.000	.123
Evening at home with friends	53	77	303.3	.000	.248
Going to church/temple/synagogue	33	59	326.4	.000	.258
Going to community meetings	6	17	148.5	.000	.174

9.3.1.6 Hobbies and pastimes

Going out to the cinema is more popular with individualism A wide range of hobbies and pastimes, especially baking, cooking unusual dishes, DIY, home decorating and reading books, all of which are usually done at home are popular with collectivism (see Table 9.6).

Table 9.6
Hobbies and pastimes for individualism and collectivism

	Individualism Cells 1+4+7	Collectivism Cells 3+6+9	Chi-square	Sig. Level	Phi
N =	2,100	2,814			
	%	%			
Chess	5	3	17.9	.000	.060
Going to cinema	13	8	24.7	.000	.071
Photography	5	3	9.0	.003	.043
Baking	17	27	62.7	.000	.113
Cooking unusual dishes	15	22	43.0	.000	.094
Do-it-yourself	13	17	18.8	.000	.062
Home decorating	10	17	47.3	.000	.098
Reading books	20	24	8.4	.004	.041

9.3.1.7 Sport

A greater number of sports are followed with collectivism, in particular, ballroom dancing, boxing, cricket, golf, gymnastics and rugby. This indicates a more varied level of interest. Soccer was the only sport with a much higher following with individualism (see Table 9.7).

Table 9.7
Sports interests for individualism and collectivism

	Individualism Cells 1+4+7	Collectivism Cells 3+6+9	Chi-square	Sig. Level	Phi
N =	2,100	2,814			
	%	%			
Soccer	64	55	37.2	.000	.087
Athletics	19	23	8.6	.003	.042
Ballroom dancing	19	23	23.3	.000	.069
Boxing	28	35	34.3	.000	.083
Cricket	24	32	40.6	.000	.091
Golf	8	10	5.8	.017	.034
Gymnastics	8	14	39.4	.000	.090
Rugby	21	28	36.4	.000	.086
Swimming	8	10	9.9	.002	.045
Tennis	15	19	10.9	.001	.047

9.3.1.8 Electronic and print media consumption and book reading

There is a higher incidence with individualism of electronic media usage and print, particularly daily and monthly magazines. The slightly higher, though of very low practical significance, access to the Internet and significantly higher reading of daily newspapers does suggest a desire for knowledge and to keep up-to-date. The incidence of reading a book in the last four weeks is the same for collectivism and individualism (see Table 9. 8).

Table 9.8
Electronic and print media exposure and book reading for individualism and collectivism

	Individualism Cells 1+4+7	Collectivism Cells 3+6+9	Chi-square	Sig. Level	Phi
N =	2,100	2,814			
	%	%			
PAST 7 DAYS					
Radio	93	88	18.0	.000	.061
Television	79	74	27.7	.661	.075
PAST 4 WEEKS					
Accessed Internet	3	1	23.2	.000	.069
Read a book	23	23	0.1	.789	.004
LAST 6 MONTHS					
Weekly newspaper	41	42	0.4	.540	.009
Daily newspaper	55	46	38.7	.000	.089
Any newspaper	61	55	20.1	.000	.064
Monthly magazines	39	31	31.7	.000	.080
Fortnightly magazine	21	20	0.5	.476	.010
Weekly magazines	39	38	0.2	.702	.006
Any magazine	57	51	15.8	.000	.057

9.3.1.9 Fashion

There is a significant difference between individualism and collectivism on the reaction to new fashions.

It is evident that individualism is at the forefront of change and novelty, as it is here that the first fashion buyers are to be found. Among collectivism there are significantly more people who are not fashion conscious (see Table 9.9).

Table 9.9
Reaction to new fashions for individualism and collectivism

	Individualism Cells 1+4+7	Collectivism Cells 3+6+9	Chi-square	Sig. Level	Phi
N =	2,100	2,814			
	%	%			
Among the first to buy	10	5	37.3	.000	.087
Buy it once your friends buy it	5	4	2.7	.098	.024
Usually wait until well-established	22	17	15.0	.000	.055
Not fashion conscious	64	74	56.5	.000	.107

9.3.1.10 Music

There are extensive differences in the types of music preferred with individualism and collectivism (see Table 9.10).

The significantly higher preference with collectivism for choirs, choral, gospel, religious, spiritual and traditional music, including "boeremusiek", indicate a liking for group, church and tribal music (see Table 9.10).

Table 9.10
Music preferences for individualism and collectivism

	Individualism Cells 1+4+7	Collectivism Cells 3+6+9	Chi-square	Sig. Level	Phi
N =	2,100	2,814			
	%	%			
Blues	14	7	60.9	.000	.111
Rap	16	8	70.8	.000	.120
Rock/Pop	42	35	25.3	.000	.072
Boeremusiek	5	11	61.9	.000	.112
Choirs/Choral	20	28	37.0	.000	.087
Country and Western	14	17	11.3	.001	.048
Gospel/Religious/Spiritual	46	65	170.0	.000	.186
Traditional	-	4	51.3	.000	.102

9.3.1.11 Trade union membership

It was expected that trade union membership would be higher under collectivism and that this would be an indicator of conflict with employees (see Table 7.1). There is, however, no statistical evidence that this is the case (see Table 9.11).

Table 9.11
Incidence of trade union membership for individualism and collectivism

	Individualism Cells 1+4+7	Collectivism Cells 3+6+9	Chi-square	Sig Level	Phi
N =	2,100	2,814			
	%	%			
Trade union - Yes	9	10	0.4	.511	.009
Trade union - No	91	90	0.4	.511	.009

9.3.1.12 Demographics

The demographics of collectivism and individualism are given in Table 9.12.

Collectivism is characterised by White, female, with lower education, older, married or living together, with a greater number of children, especially those between the ages of 10-15. People strong on individualism are more likely to be Black, male, with higher education, younger, working full-time, in a professional or technical position, single, with adults under 35 rather than over 35 years in the family, living in metro areas (see Table 9.12). All these demographic characteristics, with the exception of race, were hypothesised in the theoretical model (see Table 7.2). It had been hypothesised that the proportion of Blacks would be higher with collectivism than individualism. The reverse is found. The incidence of Blacks with individualism is significantly higher than with collectivism. The proportion of Whites was hypothesised as being higher with individualism. This is not the case. There is a higher incidence of Whites with collectivism, though the differences is not significant (see Table 9.12).

It was conjectured that collectivism would be stronger with the disadvantaged, and this is found for education, literacy and the proportion of people who are unemployed. However, the average household income is similar for those with collectivism and those with individualism values, belying the anticipated economic power of individualism. One reason for this is the greater potential number of wage earners in the larger families of those in favour of collectivism. It was also hypothesised that employment by state and large concerns would be a feature of collectivism, whilst private enterprise, smaller concerns and self-employment would be more representative of individualism. The type of employer was not established in Sociomonitor 1997/8, so these hypotheses could not be tested. There is no difference in the level of self-employment (see Table 9.12).

Table 9.12
Demographics of individualism and collectivism

	Individualism Cells 1+4+7	Collectivism Cells 3+6+9	Chi-square	Sig. Level	Phi
N =	2,100	2,814			
	%	%			
AGE					
16-24	37	18	234.1	.000	.218
25-34	26	23	7.1	.008	.038
35-49	23	28	13.5	.000	.052
50+	13	31	198.1	.000	.201
COMMUNITY					
Metro	39	34	14.0	.000	.053
Other urban	25	34	45.5	.000	.096
Settlements/Rural	36	32	7.7	.005	.040
EDUCATION					
No schooling	8	15	62.1	.000	.112
Some primary	16	19	4.1	.044	.029
Primary complete	6	9	9.0	.003	.043
Some high	40	33	28.0	.000	.075
Matric	20	16	9.3	.002	.044
Artisan's certificate	. 1	1	0.2	.665	.006
Technikon complete	5	3	8.8	.003	.042
University complete	2	2	0.9	.331	.014.
Professional	1	1	1.0	.315	.014
Technical	1	1	0.0	.914	.001
FAMILY COMPOSITION*					
Children under 2 years	18	17	1.6	.212	.018
Children 2-9 years	49	51	1.9	.174	.019
Children 10-15 years	39	48	44.6	.000	.095
Adults 16-34	81	75	29.2	.000	.077
Adults 35+	77	83	28.8	.000	.077
GENDER					
Male	56	40	113.4	.000	.152
Female	44	60	113.4	.000	.152
HOME					
House	67	73	18.1	.000	.061
Town house	1	1	0.1	.771	.004
Flat	6	6	0.3	.599	.008
Traditional hut	10	11	0.9	.347	.013
Hostel	1	-	21.2	.000 .	066
Compound	4	1	37.8	.000	.088
Room in backyard	3	2	12.3	.000	.050
Squatter hut	6	6	0.1	.786	.004

HOME OWNERSHIP

Owned	67	71	10.2	.001	.046
Rented	32	29	7.5	.006	.039
Don't Know	1	-			

HOUSEHOLD INCOME

Up to R500	20	22	4.3	.039	.029
R 500-R1999	42	39	3.4	.066	.026
R2000-R5999	23	25	3.2	.075	.025
R6000+	15	13	4.1	.043	.029

LITERACY

Literate	93	85	79.9	.000	.127
Illiterate	7	15	79.9	.000	.127

MARITAL STATUS

Single	53	29	284.7	.000	.241
Married/Living together	41	57	116.5	.000	.154
Widowed	3	11	98.6	.000	.142
Divorced	2	3	1.0	.324	.014

OCCUPATION

Professional/Technical	6	4	9.8	.002	.045
Admin/Managerial	2	1	4.7	.031	.031
Clerical/Sales	11	11	0.0	.910	.001
Transport/Communication	3	1	16.8	.000	.059
Service	8	6	8.6	.003	.042
Agriculture	4	5	3.4	.065	.026
Artisans	5	3	5.8	.016	.034
Production/Mining	6	6	0.2	.658	.006
Other/Not active	55	62.	21.5	.000	.066

RACE

Black	70	65	12.5	.000	.050
Coloured	9	11	8.0	.005	.040
Indian	3	4	2.4	.120	.022
White	18	20	1.8	.182	.019

WORKING STATUS

Full-time	36	28	34.2	.000	.083
Part-time	9	10	1.6	.212	.018
Housewife	4	14	129.6	.000	.162
Student	20	10	105.3	.000	.146
Retired	6	18	142.9	.000	.170
Unemployed	24	20	12.2	.000	.050

Self-employed

Yes	10	10	0.0	.846	.003
No	90	90	0.0	.846	.003

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* Duplication occurs

9.3.1.13 Accommodation and the transition from collectivism to individualism

It was hypothesised that recent arrivals in urban areas, especially those in poor circumstances, would be in a state of transition from collectivism to individualism. There is no significantly higher incidence for living in a backyard room or squatter hut for the in-betweens (cells 2, 5 and 8), as compared with collectivism and individualism. It would therefore seem that there is no support for this contention. There is a significant difference for those living in traditional huts, but these would almost certainly be people who have been long established in their community (see Table 9.13).

Table 9.13
<u>Home on individualism versus collectivism axis</u>

	Individualism Cells 1+4+7	In-betweens Cells 2+5+8	Collectivism Cells 3+6+9	Cells 1+4+7 and 2+5+8		Cells 2+5+8 and 3+6+9	
				Chi-square	Sig. Level	Chi-square	Sig. Level
N =	2,100	1,657	2,814				
	%	%	%				
HOME							
House	67	67	73	0.0	.925	16.6	.000
Town house	1	1	1	0.8	.369	0.5	.495
Flat	6	4	6	12.6	.000	10.6	.001
Traditional hut	10	17	11	42.6	.000	37.6	.000
Hostel	1	1	-	5.5	.020	3.5	.063
Compound	4	2	1	12.2	.000	3.8	.052
Room in backyard	3	2	2	4.6	.032	0.9	.355
Squatter hut	6	7	6	0.9	.355	1.5	.215

9.3.1.14 Gemeinschaft and Gesellschaft

It was hypothesised that Gemeinschaft would be a characteristic of collectivism and Gesellschaft of individualism (see 2.2.3 Sociology and Table 7.1). There is strong support for this argument as far as values are concerned. Religious, traditional, cultural and group values are strong with collectivism, while self-interest and modern values are a feature of individualism. Individualism is stronger in urban areas and with people in professional and technical positions. However, although there are a greater number of children in collectivism families, the higher incidence of

living in settlements and rural areas, which would be expected given the agricultural roots of Gemeinschaft, is not evident (see Tables 9.1 and 9.12).

9.3.2 PARAMETERS OF INNER- AND OUTER DIRECTED

The parameters of inner- and outer-directed are given in Tables 9.14 - 9.25.

9.3.2.1 Value characteristics of inner- and outer-directed

The incidences of value, issue and marketing trend leaders for inner- and outer-directed are given in Tables 9.14 - 9.16. Chi-square contingency table tests of the results for outer- (cells 1, 2 and 3) and inner-directed (cells 7, 8 and 9) show that all differences were highly significant. The phi coefficients for the chi-square tests between outer- (cells 1, 2 and 3) and inner-directed (cells 7, 8 and 9) indicate that the strongest chi-square associations are for Reliance on Technology, Racial Harmony, Blurring of the Sexes and Self-Improvement (see Table 9.14).

The inner-directed focus on spending time and effort to learn and do new things (SELIMP) and the preference for stimulating, satisfying work, rather than security and material gain (MEAWOR), show a degree of introversion, self-fulfilment and job satisfaction. On the other hand the inner-directed are ambitious and strive for success (ACHMNT) and have a need to be looked up to (STATUS) which would be manifestations of extraversion. Attention to health and fitness (PHYHEA) and personal appearance (SELENH) combined with the pursuit of personal achievement and success (ACHMNT) point to self-evaluation, self-realisation and self-respect. All of which, together with self-fulfilment, are indicative of an internal locus of control. Furthermore, the new and different are actively sought after (NOVCHA).

For those who are outer-directed, the locus of control is external. Precedence is given to warm relationships, security and being well-respected, which are to be found with adherence to cultural customs (CULCUS), family (FAMLSM) and country (NATIDE) reinforced by the need for belonging and approval (BELAPP). The inward values of self-improvement (SELIMP) and self-

enhancement (SELENH) are a low priority (see Table 9.14). Realisation is communal rather than individual. The values of the outer-directed do not clearly indicate whether the personality is extraverted or introverted.

Materialism is indicated with the outer-directed through their caution when spending money (ECOMIN) and a desire for overt material success (MATLSM). The inner-directed display evidence of post-materialism through their commitment to emancipation (BLUSEX) and integration (RACHAR). The effort to succeed through improvement of education and leisure time (SELIMP) and the desire for status through qualifications and position, in conjunction with materialism (STATUS) and the importance of ambition and attainment (ACHMNT), demonstrate a desire for upward mobility among the inner-directed. In contrast the outer-directed are less concerned with effort. They use brands and products to boost their self-image (BRANDX) and to gain acceptance and approval (BELAPP) (seeTable 9.14).

The desire to be in an attractive environment and the preparedness to spend time, money and effort to achieve this (ADDBEA) together with a commitment to neighbourhood and community (COMDEV) are traits of the inner-directed (see Tables 9.14 & 9.15). Personal relationships are also important. There is a willingness to get involved with the emotions of other people and to understand and empathises with their feelings. Adherence to the beliefs of conventional, well-established religions (RLGION) also plays an important part in the life of the inner-directed. With the outer-directed, despite less interest in orthodox religion, there is an authoritarian and conservative view on both the emancipation of women (BLUSEX) and liberal attitudes to sex, sexuality and sexual preferences (LIBSEX).

Personalisation (PERSON), defined as the use of particular brands and products because of their intrinsic qualities (see Appendix B - Definitions of values, marketing trends and issues) was stronger with inner-directed, as was to be expected (see Tables 7.3 & 9.14). The lower importance attached to meaningful work (MEAWOR) and the greater interest in conspicuous consumption (MATLSM) suggests that financial reimbursement is a feature of the outer-directed.

Table 9.14

Incidence of value leaders for outer- and. inner-directed

	Outer-directed Cells 1+2+3	Inner-directed Cells 7+8+9	Chi-square	Sig. Level	Phi
N =	2,564	2,435			
	%	%			
ACHMNT	13	41	472.5	.000	.307
ADDBEA	17	31	133.1	.000	.163
BLUSEX	11	47	777.2	.000	.394
EMOEMP	17	36	233.5	.000	.216
LIBSEX	21	34	112.9	.000	.150
MEAWOR	21	32	71.7	.000	.120
NOVCHA	17	31	142.5	.000	.169
PERSON	17	35	208.0	.000	.204
PHYHEA	9	37	569.7	.000	.338
RACHAR	8	48	994.4	.000	.446
RELTEC	8	48	1000.9	.000	.447
RLGION	17	34	172.6	.000	.186
SELENH	17	33	175.2	.000	.187
SELIMP	11	42	625.2	.000	.354
STATUS	15	33	224.0	.000	.212
BELAPP	31	17	478.3	.000	.309
BRANDX	30	15	162.0	.000	.180
CULCUS	33	17	176.6	.000	.162
ECOMIN	30	16	130.3	.000	.161
FAMLSM	26	23	7.6	.006	.039
MATLSM	24	19	21.4	.000	.065
NATIDE	15	37	279.7	.000	.239

9.3.2.2 Society issues

The inner-directed have confidence and optimism about the political and economic future of South Africa (OPTIMI) reflecting a positive view of life. However, they are anxious about the destruction of the natural environment and the need for its preservation (ENVCON). The outer-directed, though low on the conservation of the environment, are inclined to reject the stresses and unnaturalness of modern living, in favour of a more natural and wholesome lifestyle (RETNAT) (see Table 9.15).

Table 9.15

Incidence of issue leaders for outer- and inner-directed

	Outer-directed Cells 1+2+3	Inner-directed Cells 7+8+9	Chi-square	Sig. Level	Phi
N =	2,564	2,435			
	%	%			
COMDEV	16	42	413.6	.000	.288
ENVCON	19	35	163.0	.000	.181
RETNAT	33	17	169.5	.000	.184
OPTIMI	11	39	527.8	.000	.325

9.3.2.3 Marketing trends

Those who are inner-directed are concerned with being treated as an individual (NICMAR) and on a personal basis (CUSREL) (see Table 9.16).

Table 9.16
Incidence of marketing trend leaders for outer- and inner-directed

	Outer-directed Cells 1+2+3	Inner-directed Cells 7+8+9	Chi-square	Sig. Level	Phi
N =	2,564	2,435			
	%	%			
CUSREL	20	41	267.5	.000	.231
NICMAR	20	33	109.1	.000	.148

9.3.2.4 Activities

A greater involvement in political, social and economic discussion and attendance at political meetings among the inner directed are indicative of post-materialism. Outer-directed people have a lower degree of interest in a range of activities than those who are inner-directed (see Table 9.17).

Table 9.17

Activities enjoy regularly for outer- and inner-directed

	Outer-directed Cells 1+2+3	Inner-directed Cells 7+8+9	Chi-square	Sig. Level	Phi
N =	2,564	2,435			
	%	%			
Going to church/temple/synagogue	37	50	80.7	.000	.127
Going to exhibitions/museums	2	7	77.3	.000	.124
Meeting new people	18	32	139.5	.000	.167
Going to game reserves	4	12	105.7	.000	.145
Discussing politics, social and economic issues	2	8	80.9	.000	.127
Going to music, choir festivals	5	13	87.7	.000	.132
Going to political meetings	3	5	16.4	.000	.057
Going to community meetings	11	15	18.5	.000	.061
Attending choir, musical practice	4	9	55.0	.000	.105

9.3.2.5 Hobbies and pastimes

Inner-directed people engage in a far wider variety of activities, hobbies and pastimes, many of which use a range of senses, involve others and are likely to provide personal satisfaction: acting, art and painting, carpentry and woodwork, cooking unusual dishes, modern dancing, photography and going to the cinema. They are also more likely to participate in intellectual pursuits: chess, educational courses, playing a musical instrument and reading books (see Tables 9.17 & 9.18).

Table 9.18
Hobbies and pastimes for individualism and collectivism

	Outer-directed Cells 1+2+3	Inner-directed Cells 7+8+9	Chi-square	Sig. Level	Phi
N =	2,564	2,435			
	%	%			
Acting	3	7	56.4	.000	.106
Art and painting	2	8	81.3	.000	.127
Carpentry, woodwork	3	6	20.9	.000	.065
Chess	2	6	31.3	.000	.079
Cooking unusual dishes	14	22	63.4	.000	.113
Educational courses, improve qualifications	4	15	188.7	.000	.194
Going to cinema	5	19	224.9	.000	.21.2
Modern dancing	2	6	63.5	.000	.113
Nature, environment, conservation	2	7	64.5	.000	.114
Photography	2	6	60.9	.000	.110
Playing a musical instrument	2	6	61.6	.000	.111
Reading books	15	36	310.0	.000	.249

9.3.2.6 Electronic and print media consumption and book reading

Use of print media and reading books is far stronger with the inner-directed. Radio and television have a high incidence of use among the outer-directed, but even higher with those who are inner-directed (see Table 9.19).

Table 9.19

Electronic and print media exposure and book reading for outer- and inner-directed

	Outer-directed Cells 1+2+3	Inner-directed Cells 7+8+9	Chi-square	Sig. Level	Phi
N =	2,564	2,435			
	%	%			
Radio	89	93	23.0	.000	.068
Television	74	83	52.3	.000	.102
PAST 4 WEEKS					
Accessed Internet	1	4	64.0	.000	.113
Read a book	16	36	256.3	.000	.226
LAST 6 MONTHS					
Weekly newspaper	34	53	175.4	.000	.187
Daily newspaper	46	65	180.3	.000	.190
Any newspaper	53	72	193.9	.000	.197
Monthly magazines	28	50	250.1	.000	.224
Fortnightly magazine	13	31	240.8	.000	.219
Weekly magazines	33	52	182.4	.000	.191
Any magazine	47	69	258.7	.000	.227

9.3.2.7 Credit

It was suspected that the outer-directed would be inclined to make more use of credit facilities than those who are inner-directed. The reality is the reverse (see Table 9.20).

Table 9.20
Use of credit for outer- and inner-directed

	Outer-directed Cells 1+2+3	Inner-directed Cells 7+8+9	Chi-square	Sig. Level	Phi
N =	2,564	2,435			
	%	%			
Store card	4	8	37.1	.000	.086
Clothing account	9	17	70.8	.000	.119
Furniture account	4	8	41.9	.000	.091
No credit card	95	89	63.1	.000	.112

9.3.2.8 Fashion

Confirmation of the interest that the inner-directed have in looking after their appearance and being prepared to spend money to do so (SELENH) comes from their fashion consciousness (see Tables 9.14 & 9.21).

Table 9.21
Reaction to new fashions for outer- and inner-directed

	Outer-directed Cells 1+2+3	Inner-directed Cells 7+8+9	Chi-square	Sig. Level	Phi
N =	2,564	2,435			
	%	%			
Among the first to buy	3	13	161.7	.000	.180
Buy it once your friends by it	3	5	15.0	.000	.055
Usually wait until well-established	17	26	59.2	.000	.109
Not fashion conscious	77	56	245.3	.045	.222

9.3.2.9 Spectator sports

It was hypothesised that outer-directed people would be attracted to a greater extent to spectator sports. This is not substantiated (see Table 9.22).

Table 9.22
Spectator sports interests for outer- and inner-directed

	Outer-directed Cells 1+2+3	Inner-directed Cells 7+8+9	Chi-square	Sig. Level	Phi
N =	2,564	2,435			
	%	%			
Boxing	31	36	12.8	.000	.051
Cricket	23	33	65.5	.000	.114
Motorcar racing	6	10	32.7	.000	.081
Rugby	24	28	12.5	.000	.050
Soccer	58	64	24.3	.000	.070
Wrestling	10	11	1.9	.173	.019

9.3.2.10. Trade Union membership

It was considered likely that outer-directed people would be more inclined to seek job protection through membership of a trade union. This is not evident (see Table 9.23).

Table 9.23
Incidence of trade union membership for outer- and inner-directed

	Outer-directed Cells 1+2+3	Inner-directed Cells 7+8+9	Chi-square	Sig. Level	Phi
N =	2,564	2,435			
	%	%			
Trade union - Yes	9	12	16.8	.000	.058
Trade union - No	91	88	16.8	.000	.058

9.3.2.11 Vehicle ownership

There is a lower incidence of vehicle ownership with outer-directed people (see Table 9.24).

Table 9.24
Incidence of household vehicle ownership for outer- and inner-directed

	Outer-directed Cells 1+2+3	Inner-directed Cells 7+8+9	Chi-square	Sig. Level	Phi
N =	2,564	2,435			
	%	%			
One vehicle	18	19	1.9	.168	.019
Two vehicles	8	12	31.8	.000	.080
Three or more vehicles	2	6	52.4	.000	.102
None	73	63	59.0	.000	.109

9.3.2.12 Demographics

There is a significantly higher level of education and literacy among those who are inner- rather than outer-directed, with more that have completed technicon and university and far fewer with no education or incomplete primary school. This is manifested in significantly more people who are inner-directed working full-time, in better-paid occupation categories, with higher household income and incidence of home ownership. Thus there is support for the hypothesis that the inner-directed are favoured with financial security. It had been expected that those who were outer-directed would be more likely to be in rural areas and the inner-directed would be more prevalent in urban areas. The opposite is found. There are marginally more outer-directed people in urban communities and more inner-directed in settlements and rural areas. These differences, however, are not significant (see Tables 7.4 & 9.25).

Other demographic characteristics that had been presupposed are not found. It was hypothesised that males would be found more prevalently with those who were outer-directed and females with those who were inner directed. The results showed marginal differences that were not significant

in the opposite direction. There are also no significant differences in the incidence of Coloureds and Indians; lending support to the contention that inner- and outer-directed would be found among adults from all main population groups. It was hypothesised that inner-directed would go hand in hand with households where there were infants, young children and older people. This only holds true for children aged 2 - 9 and 10 - 15 years; the proportion of infants shows no difference. There are also significantly more young (16 - 34) single adults and fewer older (35+) married adults with inner- as compared with outer-directed (see Table 9.25).

Table 9.25
Demographics of outer- and inner-directed

	Outer-directed Cells 1+2+3	Inner-directed Cells 7+8+9	Chi-square	Sig. Level	Phi
N =	2,564	2,435			
	%	%			
AGE					
16-24	16	39	307.0	.000	.248
25-34	24	27	4.3	.228	.029
35-49	27	24	4.7	.073	.031
50+	31	10	341.7	.000	.261
COMMUNITY					
Metro	39	38	0.7	.406	.012
Other urban	32	31	0.7	.414	.012
Settlements/Rural	29	32	2.9	.089	.024
EDUCATION					
No schooling	17	3	278.5	.000	.093
Some primary	20	9	131.3	.000	.024
Primary complete	7	6	1.1	.285	.038
Some high	35	46	64.3	.000	.050
Matric	15	22	36.4	.000	.036
Artisan's certificate	1	1	0.0	.987	.006
Technikon complete	3	6	39.2	.000	.041
University complete	1	3	40.9	.000	.014
Professional	1	2	17.3	.814	.018
Technical	1	1	0.9	.334	.003
FAMILY COMPOSITION*					
Children under 2 years	16	16	0.1	.821	.003
Children 2-9 years	46	51	15.3	.000	.055
Children 10-15 years	40	45	11.0	.001	.047
Adults 16-34	72	83	81.7	.000	.128
Adults 35+	82	78	11.8	.001	.049

GENERAL

GENDER					
Male	49	51	1.8	.183	.019
Female	51	49	1.8	.183	.019
HOME					
House	67	74	28.9	.000	.076
Town house	1	1	2.8	.097	.023
Flat	6	7	3.0	.084	.024
Traditional hut	9	8	3.7	.056	.027
Hostel	1	-	12.9	.000	.051
Compound	3	1	28.7	.000	.076
Room in backyard	3	2	5.5	.020	.033
Squatter hut	8	6	7.4	.007	.038
HOME OWNERSHIP					
Owned	64	74	55.0	.000	.105
Rented	35	26	42.7	.000	.092
HOUSEHOLD INCOME					
Up to R500	22	15	37.6	.000	.087
R 500-R1999	44	35	40.3	.000	.090
R2000-R5999	23	31	32.9	.000	.081
R6000+	10	19	71.4	.000	.119
LITERACY					
Literate	85	98	255.4	.000	.036
Illiterate	16	2	255.4	.000	.060
MARITAL STATUS					
Single	32	51	188.8	.000	.194
Married/Living together	54	43	65.7	.000	.115
Widowed	10	3	104.8	.000	.145
Divorced	3	2	3.7	.056	.027
OCCUPATION					
Professional/Technical	3	8	48.7	.000	.099
Admin/Managerial	1	3	8.5	.004	.041
Clerical/Sales	8	12	20.9	.000	.065
Transport/Communication	3	1	16.7	.000	.058
Service	9	6	10.8	.001	.047
Agriculture	4	3	0.4	.523	.009
Artisans	4	5	1.3	.248	.016
Production/Mining	7	6	3.4	.067	.026
Other/Not active	60	56	11.5	.001	.048
RACE					
Black	68	66	3.3	.068	.026
Coloured	10	10	0.5	.483	.010
Indian	3	3	0.3	.620	.007
White	19	21	2.1	.150	.020

WORKING STATUS

Full-time	31	35	10.5	.001	.046
Part-time	8	9	0.1	.720	.005
Housewife	12	8	27.7	.000	.074
Student	6	26	346.5	.000	.263
Retired	16	5	155.0	.000	.176
Unemployed	25	17	51.3	.000	.101
Self-employed					
Yes	10	10	0.0	.846	.003
No	90	90	0.0	.846	.003

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* Duplication occurs

9.3.3 SUMMARY OF COMPARISON OF COLLECTIVISM AND INDIVIDUALISM AND INNER AND OUTER-DIRECTED AGAINST THEORETICAL MODEL

Based on the above results a summary is given of the parameters of collectivism versus individualism and inner- versus outer-directed (see Tables 9.26 - 9.29). It should be pointed out that the evaluation of the results against the theoretical model has been done for the hypothesised characteristics of the two major dimensions (see Tables 7.1 - 7.4) and not against each of the individual propositions that in combination led to the overall hypothetical framework.

9.3.3.1 Value parameters of collectivism and individualism

There was broad concordance between the hypothesised value parameters of collectivism and individualism and those that were discovered (see 9.3.1.1 Value characteristics of collectivism and individualism and Tables 7.1 & 9.26).

The traditional values of Gemeinschaft are found with collectivism and the more modern of Gesellschaft with individualism (see 9.3.1.14 Gemeinschaft and Gesellschaft).

Unexpectedly with collectivism, despite respect for conservation and the conventional, there is support for social change in the form of a blurring of sexual roles and racial integration. Perhaps this is a reflection of adherence to the precepts of Ubuntu. The acceptance of the new and the search for sensation is mirrored in an active social life with individualism though the hypothesis

that a wider range of interests would be a feature of individualism was not established.

The acceptance of the new and the search for sensation is mirrored in an active social life with individualism though the hypothesis that a wider range of interests would be a feature of individualism was not established.

There is no evidence that there is a greater conflict with employers with collectivism.

Table 9.26
Value parameters of collectivism and individualism

Collectivism	Individualism
Gemeinschaft	Gesellschaft
Altruistic/Ubuntu (African Humanism) - regard for nature as resource	Egoistical/Self-interest -disregard for nature as resource
Communal enterprise - limited personal freedom - threatened by individualism	Personal interests - more individual freedom
Traditional norms and mores - community involvement	Modern viewpoint
Loyalty to group structures, country and family - desire for law and order	Loyalty to self, - less respect for authority, but require group approval
Conservative, but accept emancipation and equality	Forefront of change - attracted to novelty
Religious - church and music	Irreligious
Tolerant, less conflict between values	Violent and aggressive, more conflict between values
Simple lives – less dependent on time - limited social activities - limited range of media usage - more interests, sport, hobbies and pastimes	Complex lives - driven by time - extensive social life - broad range of media usage - fewer interests

Entitlement	Individual resourcefulness
	- knowledgeable, keep up-to-date, access
	  to Internet, read more newspapers
	  and magazines

Black Consciousness passé	

9.3.3.2 Demographics of collectivism and individualism

There is a good match with the hypothesised demographics of collectivism and individualism for gender, education, age and family size. It had been hypothesised that there would be a higher incidence of Blacks with collectivism and Whites with individualism. The results showed the incidence of Blacks is significantly higher with individualism and Whites were higher with collectivism, though this was not significant. Community distribution is also not as had been expected, as the incidence of collectivism is higher in other urban, rather than rural areas. Despite being disadvantaged in terms of education, literacy, qualifications and level of employment, household incomes with collectivism were similar to those with individualism. There is no evidence that those living in backyard shacks and squatter camps are in transition between collectivism and individualism (see Tables 7.2 & 9.27).

Table 9.27
Demographic characteristics of collectivism and individualism

Collectivism	Individualism
White*	Black
Female	Male
Lower education	Higher education and qualifications
Older	Younger
Disadvantaged	
Larger families and family ties	Independent people and smaller families
Other urban	Metro, Settlement/Rural
	Professional/technical

* Not statistically significant

9.3.3.3 Value parameters of inner- and outer-directed

The values of inner- and outer-directed that were hypothesised were for the most part supported by the results (see 9.3.2.1 Value characteristics of inner- and outer-directed and Tables 7.3 & 9.28).

It had been hypothesised that inner-directed people would be introverted and outer-directed extraverted. In the case of those who are inner-directed elements of both introversion and extraversion are evident, but with the outer-directed there are no clear indicators of an introverted or extraverted personality. However, an internal locus of control is found with inner-directed and an external with outer-directed.

The inner-directed have a rich, full life; benefiting from higher education and financial position (see Table 9.28). Despite a tendency to conspicuous consumption among outer-directed, there is no support for the corollary that credit, cars and clothing would all be used for this purpose. There might, however, be practical financial reasons for this restraint.

It was expected that electronic media would have more support with outer-directed and print with the better educated inner-directed. Though radio and television are comparatively strong with outer-directed, all main media are stronger with inner-directed.

Table 9.28
<u>Value parameters of inner- versus outer-directed</u>

| **Inner-directed** | **Outer-directed** |

Internal locus of control	External locus of control
- self-fulfilment	- warm relationships
- self-respect	- well respected
- sense of accomplishment	- security, sense of belonging
Personal achievement	Conspicuous consumption
Post-materialism	Materialism
Self-evaluation	Seeks approval
Meaningful work	Financial reimbursement
- personal relationships	
- personal satisfaction	
Self-realisation and Self-enhancement	Group-realisation
- positive to occupation	
- positive to life in general	
- effort to succeed	
Attractive environment important	Practicalities
Change	Stability
Religious	
Multiple sensory activities	Few sensory activities
Intellectual activities	Spectator activities
Electronic and print media stronger	Electronic media comparatively strong

Inner- and outer-directed found among adults from all main population groups.

9.3.3.4 Demographics of inner- and outer-directed

The more fortunate financial situation of the inner-directed is confirmed. They are better off in terms of education, income and home ownership. There are more young children in inner-directed

families, but older people are more likely to be found in outer-directed households and there is no difference in the incidence of infants.

It had been hypothesised that there would be more females and urban dwellers with those who were inner-directed and more males and urban dwellers with the outer-directed. This is not found. There are marginally more males and rural dwellers with inner-directed and more females and urban dwellers with outer-directed, though these differences are not significant.

Confirmation that inner- and outer directed is a major value dimension comes from the even distribution of Blacks, Coloureds, Indians and Whites (see Tables 7.4 & 9.29).

Table 9.29
Demographic characteristics of inner- versus outer-directed

Inner-directed	**Outer-directed**
Female*	Male*
Good education	Poor education
Financially more secure, can afford	Financially less secure, so greater
to look inwards	need to look outward
- higher household income	- lower household income
- higher level and better-paid employment	- lower level of employment
- higher home ownership	- lower home ownership
Urban*	Rural*
Black	Black*
Coloured	Coloured
Indian	Indian
White*	White
Children aged 2-9 and 10-15	
Young adults (16-34)	Older adults (35)

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* Marginal difference, not significant

9.3.4 CONTRIBUTION OF THE TWO DIMENSIONS

A higher proportion of the variance (54%) explained by the two factor solution of the initial metric map was for factor one (see 9.2.3 MMDS value map). The length loading for factor one was 3.5127 compared to 2.9916 for factor two. Thus it can be concluded that individualism versus collectivism, as suspected in the theoretical model, makes a greater contribution to social values than the inner- versus outer-directed dimension (see 7.2 Hypothesised dimensions of South African social values).

9.3.5 SPATIAL PARTITION OF DIMENSIONS OF SOCIAL VALUES

The Sociomonitor 1997/8 Value Map has been partitioned according to the trend leaders that characterise individualism versus collectivism and outer- versus inner-directed. The borders between the values emanating from the sample midpoint are well defined for collectivism and inner-directed. Aimlessness (AimLes), Belonging and Approval (BelApp) and Violence and Aggression (VioAgg) that are features of individualism overlap with outer-directed (see Figure 9.5). Apart from these exceptions, there is support for the view that the relationships between these dimensions would be in the form of a polar spatial pattern or 'wedgelike regions emanating from a common origin' (Levy, 1985) (See Figure 1.3).
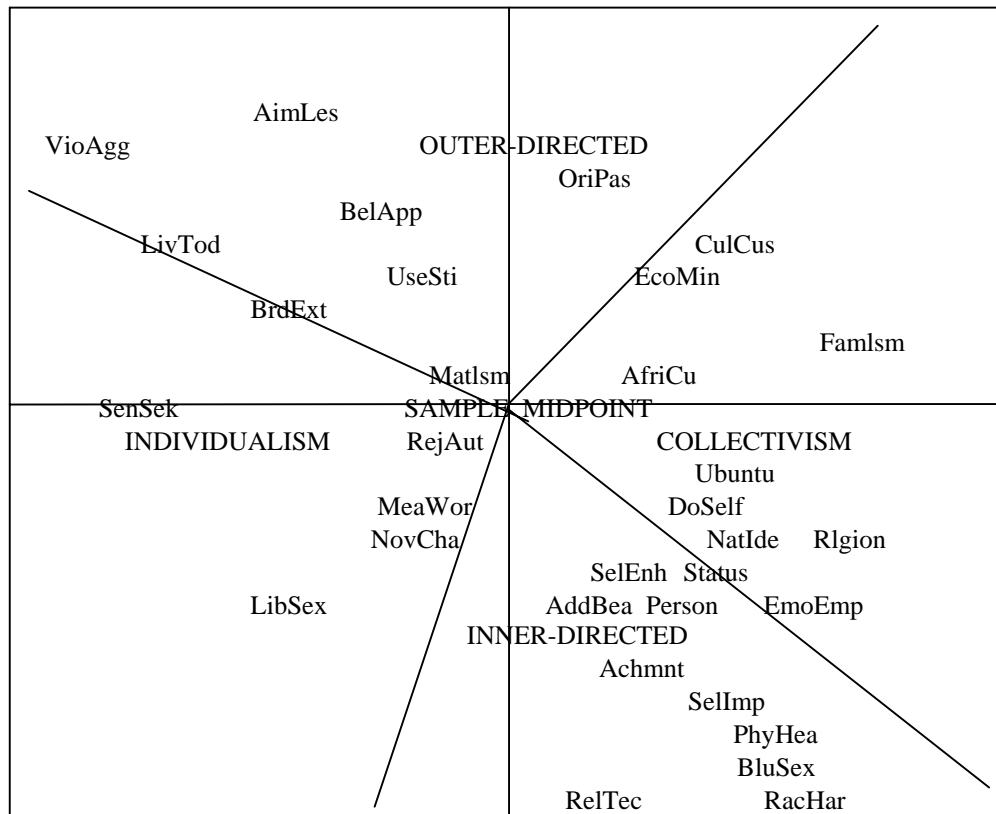
Figure 9.5. Spatial partition of Sociomonitor 1997/8 Value Map.

9.4 IDENTIFICATION OF VALUE TYPES

The identification of the value types was done by using a correlation matrix of the values (see Appendix C – Correlation matrix) as input into principal factor analysis with varimax rotation. Three, four, five and six factor solutions were examined (see Appendix D – Factor analysis). The five-factor solution, taking both positive and negative loadings into account, was selected as the most meaningful combination of values (see Table 9.30).

Table 9.30

Factor loadings from the five-factor solution

| | Factor loadings* | | | | |
	I	II	III	IV	V
ACHMNT	0.7	0.0	0.0	0.2	0.0
ADDBEA	0.1	0.0	0.1	0.5	0.1
AFRICU	0.2	0.2	-0.1	-0.1	0.4
AIMLES	-0.2	0.5	-0.1	-0.4	0.0
BELAPP	-0.1	0.6	0.0	0.0	0.1
BLUSEX	0.2	-0.5	0.2	0.1	0.1
BRDEXT	0.3	0.6	0.0	0.3	0.0
CULCUS	0.0	0.1	-0.7	0.0	0.0
DOSELF	0.5	-0.1	-0.1	-0.1	0.1
ECOMIN	0.3	0.2	-0.3	-0.4	0.2
EMOEMP	-0.1	-0.3	0.0	0.2	0.2
FAMLSM	0.3	-0.2	-0.4	-0.1	0.3
LIBSEX	0.1	0.1	0.5	0.0	-0.1
LIVTOD	0.0	0.4	0.3	-0.2	0.0
MATLSM	0.2	0.5	0.0	0.3	0.0
MEAWOR	0.2	0.0	0.1	0.1	0.0
NATIDE	0.3	-0.1	0.0	-0.1	0.5
NOVCHA	0.6	0.2	0.1	0.2	-0.1
ORIPAS	0.3	0.2	-0.4	-0.4	-0.3
PERSON	0.6	-0.1	0.0	0.0	0.1
PHYHEA	0.4	-0.2	-0.1	0.5	0.1
RACHAR	0.3	-0.3	0.5	0.1	0.4
REJAUT	0.3	-0.1	0.1	-0.2	-0.5
RELTEC	0.3	-0.2	0.3	0.5	-0.1
RLGION	0.2	-0.4	-0.5	0.1	0.2
SELENH	0.2	0.0	-0.2	0.5	-0.1
SELIMP	0.6	0.0	0.1	0.3	0.1
SENSEK	0.2	0.4	0.3	0.1	-0.4
STATUS	0.5	0.2	0.0	0.2	0.3
UBUNTU	0.5	0.0	-0.2	0.0	0.5
USESTI	0.0	0.5	0.1	0.0	0.1
VIOAGG	-0.1	0.6	0.1	-0.1	-0.4

* Rounded to one decimal place

Every respondent was then allocated to one of five value types according to their highest factor score, which was based on the product of their score on each value and the corresponding factor loadings.

9.4.1 NAMING THE VALUE TYPES

The index of value leaders within each type is shown in Table 9.31. On the basis of this analysis each type was given a handle that encapsulated their dominant value system. "Conformists" had scored highest on factor V, "Transitionals" on factor I, "Progressives" on factor IV, "Non-conformists" on factor III and "Todayers" on factor II.

Table 9.31

Index of value leaders among five value types*

	Conformists	Transitionals	Progressives	Non-conformists	Todayers
ACHMNT	74	188	118	56	64
ADDBEA	80	79	166	79	90
AFRICU	181	106	76	42	89
AIMLES	94	82	38	60	196
BELAPP	102	76	63	53	180
BLUSEX	118	129	123	145	11
BRDEXT	40	109	77	51	194
CULCUS	141	141	114	19	78
DOSELF	110	184	78	75	55
ECOMIN	153	166	28	48	93
EMOEMP	158	74	151	97	37
FAMLSM	154	151	84	41	67
LIBSEX	53	90	93	199	83
LIVTOD	64	72	29	116	197
MATLSM	54	117	114	39	156
MEAWOR	79	107	112	112	93
NATIDE	173	107	76	89	61
NOVCHA	53	182	94	73	93
ORIPAS	93	180	41	52	117
PERSON	87	200	81	71	61
PHYHEA	98	123	183	78	33
RACHAR	180	97	101	137	11
REJAUT	24	173	71	145	90
RELTEC	66	118	167	128	39
RLGION	180	147	137	39	9
SELENH	72	127	193	44	67
SELIMP	93	165	127	64	55
SENSEK	12	102	84	142	153
STATUS	128	151	83	57	77
UBUNTU	141	170	93	35	58
USESTI	106	98	53	79	149
VIOAGG	21	58	50	100	239

* Indexed to 100 against a norm of 100 for the total population.

9.4.2 DESCRIPTION OF EACH VALUE TYPE

A brief description of the values held by each type follows.

9.4.2.1 Conformists (5,042,000 adults)

Conformists represent 20% of the South African population. They gain a sense of belonging and identity from group structures such as church, country and family. These roots would reinforce their adherence to convention. Conformists are averse to taking risks and are careful with their money. They adhere to African and cultural customs, are law abiding, low on sensation seeking and, in the spirit of Ubuntu, empathetic to others. Indices for Conformists, against a norm of 100 for the total population, are shown for their leading and lagging values in Table 9.32.

Table 9.32
Indices of leading and lagging values – Conformists

Leading Values		Lagging Values	
AFRICU	181 – African customs	SENSEK	12 – Sensation seeking
RACHAR	180 – Racial harmony	VIOAGG	21 – Violence and aggression
RLGION	180 – Religion	REJAUT	24 – Rejection of authority
NATIDE extrinsics	173 - National identity	BRDEXT	40 – Brand
EMOEMP	158 – Emotional empathy	NOVCHA	53 – Novelty and change
FAMLSM	154 – Familism	LIBSEX	53 – Liberal sex
ECOMIN	153 – Economy mindedness	MATLSM	54 – Materialism
CULCUS	141 – Cultural customs	LIVTOD	64 – Living for today
UBUNTU	141 – Ubuntu	RELTEC	66 – Relate to technology
STATUS	128 – Status	SELENH	72 – Self enhancement
BLUSEX	118 – Blurring of the sexes	ACHMNT	74 – Achievement

9.4.2.2 Transitionals (5,278,000 adults)

Twenty one percent of the South African population are Transitionals. Their values are a mix of

the old and the new, of adherence to group norms and individual attainment. Cultural customs, family, religion and Ubuntu are intermingled with elements of self-interest. There is a drive for achievement motivated by materialism and overt status (see Table 9.33).

Table 9.33
Indices of leading and lagging values – Transitionals

Leading Values		Lagging Values	
PERSON	200 – Brand intrinsics	VIOAGG	58 – Violence and aggression
ACHMNT	188 – Achievement	LIVTOD	72 – Living for today
DOSELF	184 – Do-it-yourself	EMOEMP	74 – Emotional empathy
NOVCHA	182 – Novelty and change	BELAPP	76 – Belonging and approval
ORIPAS	180 – Orientation to the past	ADDBEA	79 – Adding beauty
REJAUT	173 – Rejection of authority	AIMLES	82 – Aimlessnes
UBUNTU	170 – Ubuntu	LIBSEX	90 – Liberal sex attitudes
ECOMIN	166 – Economy minded		
SELIMP	165 – Self improvement		
FAMLSM	151 – Familism		
STATUS	151 – Status		
RLGION	147 – Religion		
CULCUS	141 – Cultural customs		
BLUSEX	129 – Blurring of the sexes		
SELENH	127 – Self enhancement		
PHYHEA	123 – Physical health		
RELTEC	118 – Relate to technology		
MATLSM	117 – Materialism		

9.4.2.3 Progressives (4,833,000 adults)

Progressives represent 19% of the South African population. Their values are focussed on self. Personal appearance, physical health and improvement are all important. Progressives enjoy the highest household income of all the groups and are not concerned with being economy minded. They are modern in a peaceful way, accepting both technology and an equal place for men and women in society. However, they favour their own cultural customs and have only average acceptance of racial harmony (see Table 9.31).

Table 9.34
Indices of leading and lagging values – Progressives

Leading Values		**Lagging Values**	
SELENH	193 – Self enhancement	ECOMIN	28 – Economy mindedness
PHYHEA	183 – Physical health	LIVTOD	29 – Living for today
RELTEC	167 – Relate to technology	AIMLES	38 – Aimlessness
ADDBEA	166 – Adding beauty	ORIPAS	41 – Oriented to the past
EMOEMP	151 – Emotional empathy	VIOAGG	50 – Violence and aggression
RLGION	137 – Religion	USESTI	53 – Use of stimulants
SELIMP	127 – Self improvement	BELAPP	63 – Belonging and approval
BLUSEX	123 – Blurring of the sexes	REJAUT	71 – Rejection of authority
ACHMNT	118 – Achievement	NATIDE	76 – National identity
CULCUS	114 – Cultural customs	AFRICU	76 – African customs
MATLSM	114 – Materialism	DOSELF	78 – Do-it-yourself
MEAWOR	112 – Meaningful work	PERSON	81 – Brand intrinsics
		STATUS	83 – Status
		SENSEK	84 – Sensation seeking
		FAMLSM	84 – Familism

9.4.2.4 Non-conformists (4,375,000 adults)

Seventeen percent of the South African population are Non-conformists. This type holds strong beliefs regarding values concerned with emancipation. Their endorsement of the merging of gender roles, acceptance of other races and liberal attitudes to sexual behaviour are all expressions of a rejection of South African traditional norms and authoritarian viewpoints. Non-conformists are highly individualistic, with limited respect for group structures and conventional customs (see Table 9.35).

Table 9.35

Indices of leading and lagging values – Non-conformists

Leading Values		**Lagging Values**	
LIBSEX	199 – Liberal sex attitudes	CULCUS	19 – Cultural customs
BLUSEX	145 – Blurring of the sexes	UBUNTU	35 – Ubuntu
REJAUT	145 – Rejection of authority	RLGION	39 – Religion
SENSEK	142 – Sensation seeking	MATLSM	39 – Materialism
RACHAR	137 – Racial harmony	FAMLSM	41 – Familism
RELTEC	128 – Relate to technology	AFRICU	42 – African customs
LIVTOD	116 – Living for today	SELENH	44 – Self enhancement
MEAWOR	112 – Meaningful work	ECOMIN	48 – Economy mindedness
		BRDEXT	51 – Brand extrinsics
		ORIPAS	52 – Orientation to the past
		BELAPP	53 – Belonging and approval
		ACHMNT	56 – Achievement
		STATUS	57 – Status
		AIMLES	60 – Aimlessness
		SELIMP	64 – Self improvement
		PERSON	71 – Brand intrinsics
		NOVCHA	73 – Novelty and change
		DOSELF	75 – Do-it-yourself
		PHYHEA	78 – Physical health
		USESTI	79 – Use of stimulants
		ADDBEA	79 – Adding beauty
		NATIDE	89 – National identity

9.4.2.5 Todayers (6,193,000 adults)

Todayers form 24% of the South African population, and are thus the largest of the five value types. They are extremely aggressive, focussing on the present with little care for the future. Whilst rejecting virtually all traditional norms and group structures, Todayers still have a desire for belonging and approval. They are attracted by the extrinsics of a brand, rather than what it can add to their personal identity. Whilst focussing mainly on life now, they still have a hankering for a past that may seem more attractive than an uncertain future (see Table 9.36).

Table 9.36

Indices of leading and lagging values – Todayers

Leading Values		Lagging Values	
VIOAGG	239 – Violence and aggression	RLGION	9 – Religion
LIVTOD	197 – Living for today	RACHAR	11 – Racial harmony
AIMLES	196 – Aimlessness	BLUSEX	11 – Blurring of the sexes
BRDEXT	194 – Brand extrinsics	PHYHEA	33 – Physical health
BELAPP	180 – Belonging and approval	EMOEMP	37 – Emotional empathy
MATLSM	156 – Materialism	RELTEC	39 – Relate to technology
SENSEK	153 – Sensation seeking	SELIMP	55 – Self improvement
USESTI	149 – Use of stimulants	DOSELF	55 – Do-it-yourself
ORIPAS	117 – Oriented to the past	UBUNTU	58 – Ubuntu
		PERSON	61 – Brand intrinsics
		NATIDE	61 – National identity
		ACHMNT	64 - Achievement
		SELENH	67 – Self enhancement
		FAMLSM	67 – Familism
		STATUS	77 – Status
		CULCUS	78 – Cultural customs
		LIBSEX	83 – Liberal sex
		AFRICU	89 – African customs
		ADDBEA	90 – Adding beauty
		REJAUT	90 – Rejection of authority

9.4.3 LOCATION OF THE FIVE VALUE TYPES

The location of the five value types in relationship to the trend leaders is shown on the Sociomonitor value map (see Figure 9.6). The position of each type is in line with the intensity of the values held. For example, the Todayers is close to values with above average indices, such as Violence and Aggression, Living for Today, Aimlessness, Brand Extrinsics, Belonging and Approval; but far from values which are below average, such as Religion, Racial Harmony, and Blurring of the Sexes (see Table 9.36).
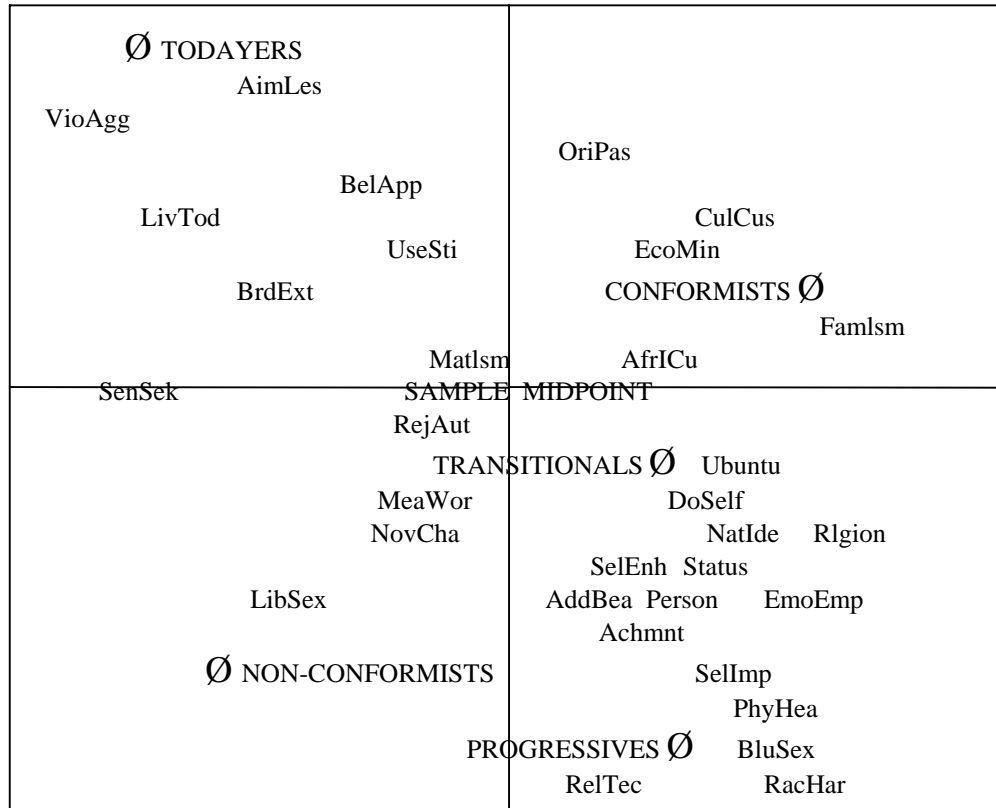
Figure 9.6. Location of value types on Sociomonitor 1997/8 Value Map (ACNielsen MRA, 1998).

9.4.4   COMPARISON WITH THE HYPOTHESISED NUMBER OF TYPES

It was anticipated that there would be five types: Type 1, Self-Gratifiers; Type 2, Traditionals; Type 3, Emancipateds; Type 4, Endurers and Resigneds and Type 5, Transitionals (see 7.4 Hypothesised number and nature of types). A comparison of the five types that were identified in Sociomonitor 1997/8 and the five hypothesised types is given in Table 9.37.

Table 9.37

Comparison of hypothesised and Sociomonitor types

	Hypothesised		**Sociomonitor**
Type 1	Self-Gratifiers	Type 1	Todayers
Type 2	Traditionals	Type 2	Conformists
Type 3	Emancipateds	Type 3a	Non-conformists
		Type 3b	Progressives
Type 4	Endurers and Resigneds		Not found
Type 5	Transitionals	Type 5	Transitionals

There is a close match between the Sociomonitor Todayers (Type 1) and the hypothesised Self-Gratifiers (Type 1) in terms of their values, as shown by their location in the value space. Sociomonitor Conformists (Type 2) is similar to the hypothesised Traditionals (Type 2). However, both the Sociomonitor Progressives (Type 3b) who are inner-directed, leaning towards collectivism and the Non-conformists (Type 3a) who are also inner-directed, but far more inclined to individualism, are apparent in place of the Emancipateds (Type 3). The hypothesised Endurers and Resigneds (Type 4), strongly inclined to both collectivism and outer-directed, premised on research dating from 1993, was not found in Sociomonitor 1997/8; probably because of the economic and social developments that have taken place during the interim. The position of the Sociomonitor Transitionals (Type 5) is as anticipated (see Figure 9.7).

Outer-directed

Type 4 (Endurers and Resigneds)

Type 1 (Self-Gratifiers) Todayers

Type 2 (Traditionals) Conformists

Type 5 (Transitionals) Transitionals

Individualism ←——————————→ Collectivism

Type 3a Non-conformists
Type 3 (Emancipateds)
Type 3b Progressives

Inner-directed
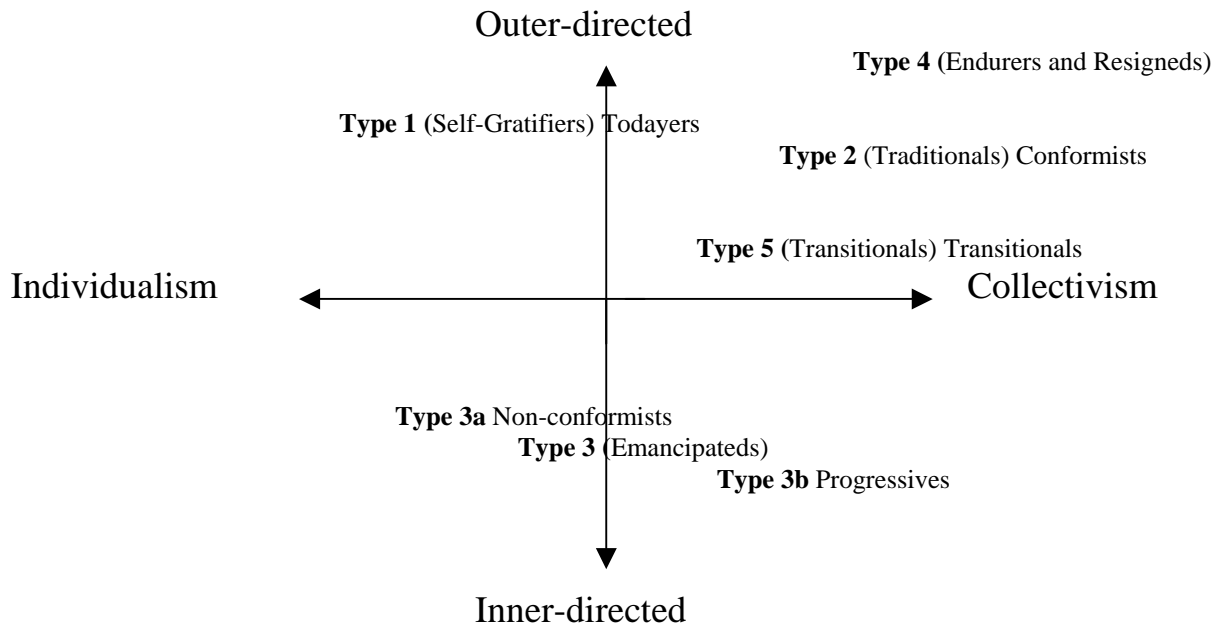
Figure 9.7. Location of hypothesised and identified value types within a common value framework.

9.4.5 CHARACTERISTICS OF THE VALUE TYPES

The value types can be described in terms of their activities, hobbies, interests, demographics media and product usage, political affiliations and any other variable in the Sociomonitor 1997/8 database. Chi-square contingency table results were applied to the findings of the five types. Significant differences were found. The following examples given in Tables 9.38 – 9.47 illustrate the characteristics of the value types. They show that there are marked differences in who the types are, what they do and their interests.

9.4.5.1 Activities, hobbies and pastimes

The Progressives have the most energetic lifestyle, whilst the Conformists and Todayers are generally less active (see Tables 9.38 & 9.39).

Table 9.38

Activities enjoy regularly by value types

| | Conformists | Progressives | Todayers | | | Chi-square | Sig. level |
| | | Transitionals | Non-conformists | | | | |
N =	1,397	1,445	1,335	1,100	1,294		
	%	%	%	%	%		
Evening at home with friends	26	36	44	37	29	119.9	.000
Evening at home with family	75	65	66	61	54	136.9	.000
Casual party at friend's house	13	19	23	22	10	116.9	.000
Playing computer games	2	5	6	8	2	78.4	.000
Playing sport	9	16	23	17	12	117.5	.000
Going to nightclubs	1	5	7	9	4	97.1	.000
Going to church,/temple/synagogue	54	47	56	34	33	241.7	.000
Sunbathing and swimming	4	9	11	10	3	91.8	.000
Going to community meetings	18	15	12	8	8	90.9	.000
Watching videos	12	20	23	21	12	99.8	.000

Table 9.39

Hobbies and pastimes for value types

| | Conformists | Progressives | Todayers | | | Chi-square | Sig. level |
| | | Transitionals | Non-conformists | | | | |
N =	1,397	1,445	1,335	1,100	1,294		
	%	%	%	%	%		
Baking	24	28	26	20	14	93.6	.000
Educational courses, improve qualifications	4	10	14	12	4	140.0	.000
Going to cinema	4	10	15	15	5	163.4	.000
Reading books	18	23	32	23	12	169.7	.000
Watching television	44	50	58	52	46	64.0	.000

9.4.5.2 Sport

There was considerable interest in all the main sports, especially soccer, which is a particular favourite of the Todayers. The Transitionals and Progressives have a higher level of sports interest than the other types (see Table 9.40).

Table 9.40
Sports interests for value types

	Conformists	Progressives	Todayers			Chi-square	Sig. level
		Transitionals	Non-conformists				
N =	1,397	1,445	1,335	1,100	1,294		
	%	%	%	%	%		
Athletics	18	22	24	19	13	60.4	.000
Boxing	32	37	36	28	29	38.5	.000
Cricket	25	29	30	24	17	74.6	.000
Gymnastics	10	11	14	10	5	60.7	.000
Netball	14	14	20	12	9	71.2	.000
Rugby	25	24	27	20	16	57.3	.000
Soccer	58	63	63	60	67	26.3	.000

9.4.5.3 Electronic and print media consumption

Transitionals and Progressives are more readily reached by newspapers, magazines, radio and television, than the other groups. People who are Conformists have the lowest exposure to media (see Table 9.41).

Table 9.41
Electronic and print media exposure for value types

	Conformists	Progressives	Todayers			Chi-square	Sig. level
		Transitionals	Non-conformists				
N =	1,397	1,445	1,335	1,100	1,294		
PAST 7 DAYS							
Radio	86	94	93	90	92	68.5	.000
Television	66	74	78	74	74	53.6	.000
LAST 6 MONTHS							
Any newspaper	40	61	67	62	54	242.6	.000
Any magazine	39	60	67	55	46	270.0	.000

9.4.5.4 Music

Musical preferences differ considerably between the groups. The appreciation of gospel, religious and spiritual music is highest with the Conformists and lowest with the Non-conformists. Country and Western is most popular with the Transitionals, Rock and Pop with the Progressives and Non-conformists, who also have a preference for Rap (see Table 9.42).

Table 9.42
Music preferences for value types

| | Conformists | Progressives | | Todayers | | Chi-square | Sig. level |
| | | Transitionals | Non-conformists | | | | |
N =	1,397	1,445	1,335	1,100	1,294		
	%	%	%	%	%		
Blues	5	7	11	14	11	77.0	.000
Country and Western	13	20	16	14	13	37.5	.000
Gospel/religious/spiritual	63	58	57	46	50	92.4	.000
Rap	6	10	19	15	11	125.6	.000
Rock/pop	29	38	44	45	33	104.8	.000

9.4.5.5 Electricity and water in home

Conformists are the worst off of the five types with regard to the provision of electricity and access to water (see Table 9.43).

Table 9.43
Electricity and water in home of value types

| | Conformists | Progressives | Todayers | Chi-square | Sig. level |
	Transitionals	Non-conformists			
N =	1,397 1,445	1,335 1,100	1,294		
	% % % % %				
Electricity in house	62 68 72 69 67			33.0	.000
Water in house	39 47 50 45 38			58.0	.000
Water on plot	24 25 20 27 29			31.9	.000
No water	36 29 29 28 33			28.6	.000

9.4.5.6 Usage of everyday products

There are significant differences between the five types in the use of everyday products. In general, the Conformists and Todayers are less frequent users (see Table 9.44).

Table 9.44
Everyday products used or bought regularly for value types

| | Conformists | Progressives | Todayers | Chi-square | Sig. level |
	Transitionals	Non-conformists			
N =	1,397 1,445	1,335 1,100	1,294		
	% % % % %				
Butter	21 30 29 26 25			36.9	.000
Chutney	19 22 23 22 14			44.1	.000
Curry powder	55 66 63 55 60			52.9	.000
Foil	19 24 23 22 14			53.4	.000
Pasta products	31 34 38 37 18			154.8	.000

9.4.5.7 Usage of chicken fast-food outlets

Conformists use chicken fast-food outlets less frequently than the other types. Transitionals and Todayers are inclined to Chicken Licken and Kentucky Fried Chicken, whereas Progressives and Non-conformists have the highest preference for Nando's (see Table 9.45).

Table 9.45
Usage of chicken fast-food outlets in past four weeks for value types

	Conformists	Progressives	Todayers			Chi-square	Sig. level
		Transitionals	Non-conformists				
N =	1,397	1,445	1,335	1,100	1,294		
	%	%	%	%	%		
Chicken Licken	7	14	12	12	14	43.5	.000
Kentucky Fried Chicken	11	18	17	17	19	39.3	.000
Nando's	2	6	9	8	6	67.3	.000

9.4.5.8 Political parties

The greatest support in all the groups is for the African National Congress, especially with the Conformists and Non-conformists. The Democratic Party appeals most to the Non-conformists. The Inkatha Freedom Party is strongest with the Todayers and the National Party with the Conformists, Progressives and Transitionals (see Table 9.46).

Table 9.46
Affiliation to main political parties for value types

	Conformists	Progressives	Todayers			Chi-square	Sig. level
		Transitionals	Non-conformists				
N =	1,397	1,445	1,335	1,100	1,294		
	%	%	%	%	%		
African National Congress (ANC)	63	56	54	60	55	31.3	.000
Democratic Party (DP)	2	2	3	6	1	65.9	.000
Inkatha Freedom Party (IFP)	5	7	4	3	10	69.6	.000
National Party (NP)	13	11	12	8	7	37.2	.000

9.4.5.9 Demographics

There are major differences in the demographics of the five types (see Table 9.47). Conformists are more likely to be female, older and with limited education. Only one in every four is working full-time and household incomes are the lowest for the five types. Few outstanding demographics characterise the Transitionals. They are comparatively well-educated, with the highest proportion

of clerical and sales workers and those working part-time. The Progressives and Non-conformists are young, urbanised, also well-educated, with higher household incomes than the other types. Many of the Progressives are students and the proportion of those who are unemployed is the lowest of the five types. English/Other and Sotho/Other speakers have their highest representation among the Non-conformists. The Todayers tend to be male, poorly to fairly well-educated, in the lower middle household income group. Many are unemployed. A high proportion is Black, mainly with Nguni as the home language, and a low proportion is Coloured.

Table 9.47
Demographics of value types

	Conformists	Progressives	Todayers			Chi-square	Sig. level
		Transitionals	Non-conformists				
N =	1,397	1,445	1,335	1,100	1,294		
	%	%	%	%	%		
AGE							
16-24	17	27	41	34	25	218.9	.000
25-34	19	28	25	22	29	44.8	.000
35-49	28	26	23	24	26	10.6	.031
50+	35	18	10	16	20	293.6	.000
COMMUNITY							
Metro	25	28	34	40	33	77.5	.000
Other urban	30	29	27	21	25	31.8	.000
Settlements/Rural	46	43	39	40	42	16.5	.000
EDUCATION							
No schooling	21	9	5	10	12	190.1	.000
Some primary	26	15	14	14	22	107.4	.000
Primary complete	9	9	5	6	8	25.3	.000
Some high	30	40	44	38	37	61.2	.000
Matric	10	18	19	19	16	56.7	.000
Artisan's certificate	-	1	1	-	-	26.5	.000
Technikon complete	2	3	4	5	2	27.2	.000
University complete	-	2	3	3	-	49.8	.000
Professional	1	1	3	1	1	30.9	.000
GENDER							
Male	38	48	48	51	54	78.2	.000
Female	62	52	52	49	46	78.2	.000
HOME							
House	70	69	69	74	63	35.3	.000
Town house	1	1	-	1	1	13.4	.010
Flat	5	6	6	7	4	12.9	.012
Traditional hut	13	14	12	6	16	12.0	.017

Hostel	-	1	-	1	1	60.8	.000
Compound	2	3	2	2	4	16.3	.003
Room in backyard		2	2	3	2	3	6.7
.151							
Squatter hut	6	5	6	7	7	6.6	.156
HOME OWNERSHIP							
Owned	73	72	71	71	68	9.1	.060
Rented	29	27	29	29	30	3.4	.491
HOME LANGUAGE							
English/Other not vernacular	9	10	10	17	7	70.5	.000
Afrikaans/Both	19	18	19	13	12	43.9	.000
Nguni (Xhosa, Zulu)	41	39	44	30	51	115.3	.000
Sotho/Other vernacular	31	33	27	40	30	51.7	.000
HOUSEHOLD INCOME							
Up to R500	31	23	19	22	25	59.3	.000
R 500-R1999	42	41	37	38	47	32.6	.000
R2000-R5999	19	24	28	23	21	35.4	.000
R6000+	8	12	16	17	7	98.9	.000
LITERACY							
Literate	79	92	95	92	87	216.5	.000
Illiterate	21	8	5	8	13	216.5	.000
OCCUPATION							
Professional/Technical	3	4	6	7	4	29.8	.000
Admin/Managerial	-	2	2	3	1	43.5	.000
Clerical/Sales	8	13	11	10	9	22.8	.000
Transport/Communication	1	1	2	1	3	27.3	.000
Service	6	7	7	6	8	5.7	.221
Agriculture	7	5	4	4	4	20.1	.000
Artisans	3	5	4	5	5	10.4	.034
Production/Mining	7	6	4	7	7	15.9	.003
Other/Not active	66	58	60	56	59	31.3	.000
.							
RACE							
Black	72	71	71	72	80	43.1	.000
Coloured	11	8	10	9	6	24.5	.000
Indian	2	4	3	3	2	14.3	.006
White	15	17	17	19	12	26.1	.000
WORKING STATUS							
Full-time	25	30	31	36	31	36.3	.000
Part-time	8	12	8	8	10	20.5	.000
Housewife	15	13	9	6	6	96.9	.000
Student	9	14	29	21	10	272.5	.000
Retired	21	9	6	6	12	211.1	.000
Unemployed	23	23	17	23	31	72.5	.000

9.5   CHAPTER SUMMARY

In this chapter the research findings from Sociomonitor 1997/8 have been compared against the theoretical framework outlined in Chapter 7.

The results indicate that there is support for the contention that collectivism versus individualism and inner- versus outer-direct are two major dimensions underlying values and that these are orthogonal to each other. The individualism versus collectivism dimension is the more discriminating of the two. These dimensions have a polar spatial pattern from a common origin.

The value characteristics of collectivism versus individualism and inner- versus outer-directed were described and were substantially as had been presupposed. The values provide a comprehensive measure of these two dimensions and differ from each other in the manner predicted, supporting the underlying theoretical assumptions.

The demographics of collectivism and individualism broadly follow the theoretical model, with some exceptions. The hypothesised Black, rural profile for collectivism is not confirmed. Nor is the higher White incidence with individualism. There are more Whites with collectivism, though this is not significant, and more Blacks with individualism. Those living in settlements and rural areas are more prevalent with individualism, as were Metro dwellers that had been premised. Education and financial security are in favour of inner-directed as had been hypothesised. The premised male and urban bias towards outer-directed and female and rural towards inner-directed is found to be the opposite, though the differences are not significant.

Five multi-ethnic value types, the Conformists, Transitionals, Progressives, Non-conformists and Todayers were identified and their values outlined. They were located on a value map and their positions compared with that of five hypothesised types. The location of three of the types was as had been predicated. Two types were found in place of one of the supposed types and one was not identified, probably because of recent improvements in economic and social circumstances.

Examples were given of the activities and interests, demographics, media consumption, product

usage and political inclinations of the five types.

In the next chapter the overall conclusions and implications of the study are drawn and examples given as to how knowledge of the five common value types could be used. Suggestions regarding further research are provided.

CHAPTER 10

CONCLUSIONS, IMPLICATIONS AND IMPERATIVES
FOR FURTHER RESEARCH

10.1   INTRODUCTION

In this chapter the conclusion is drawn, on the basis of the research findings, that the people of South Africa hold similar underlying values and that there are no fundamental differences between population groups in this regard.

The implications of this end result for marketing, political and social policy decision making is described.

The importance of keeping track of changes in society is stressed, especially as there is a large group of people who for various reasons have little care or consideration for the future (see 9.4.2.5 Todayers).

It is pointed out that the theoretical framework that has been built up can be used for further research and that knowledge of value change can assist in scenario development.

10.2   CONCLUSIONS

It is apparent from the findings of Sociomonitor 1997/8 that the values of South African adults fall within the parameters of two dimensions, collectivism versus individualism and inner- versus outer-directed. Furthermore, it is evident that within this framework there are five types of people, named the Conformists, Transitionals, Progressives, Non-conformists and Todayers, who subscribe to different sets of values. The marked differences between these types as regards their lifestyle, media and product usage indicate that values are strongly related to human behaviour.

10.3   IMPLICATIONS

The identification of a multi-ethnic typology has considerable relevance in a number of fields.

10.3.1 MARKETING

10.3.1.1.Marketing segmentation

In the past many products were developed to appeal to a particular ethnic group. There was a measure of logic in this approach, as living standards differed markedly and there were wide divergences in culture and mores, manifested in the language spoken most frequently in the home, media consumption and products used. Geographical location in South Africa has also been virtually synonymous with race, making it easier to distribute and promote products in a defined target area to a specific racial segment. However, moves towards an egalitarian and integrated society have cast doubt on the merits of this approach. The five value types provide an effective alternative. They have the advantage over many traditional ways of identifying segments because values have a strong causal influence on the ways in which consumers respond to marketing activities (see 5.5.8 Segmentation by values).

10.3.1.2 Identifying target markets

Marketers can select which of the five types offer the most potential for the different brands and products presently available. An analysis of the strengths and weaknesses of existing offerings within each value type can highlight where there are opportunities for both new and current brands. In some cases there may even be the need to rationalise brands where there is duplication of use within the same type. Through a value based strategy, it is also possible to position products in areas where there is strong potential for future growth.

10.3.1.3 Promotion

Once the types that form the target market have been selected a detailed knowledge of their values can be applied to determine which claims will be most likely to appeal and how they can best be communicated. Knowledge of the activities and interests of the people making up each type can be used in the development of a compatible creative milieu (see Tables 9.38 & 9.39). Sports interests can furthermore suggest opportunities for appropriate sponsorships (see Table 9.40).

Music is used extensively in promotion. The musical preferences of the types can be taken into account when creating advertising for a target market (see Table 9.42).

10.3.1.4 Media

Knowledge of the media consumption of each type has dual advantages. It helps in understanding the personality profile and also indicates which vehicles are most likely to reach the desired target type (see Tables 9.39 & 9.41).

The value profile of a target market, for example, a type, or users of a specific brand, can be compared with the value profiles of various media options to identify where there is the greatest compatibility (McLuhan, 1964). A profile is determined by seeing the extent to which the value leaders are above or below average (see Table 9.31). Profile comparisons can be done by eye, or through the use of Euclidean distance applied to differences. Media that have similar profiles to that of a defined target market will have a shorter Euclidean distance than those that are disparate (Corder, 1981). The results can be treated as a qualitative measurement that would influence the selection of media vehicles, prior to the traditional cost evaluation of reach and frequency of exposure within a defined time period.

10.3.1.5 Packaging

The value types differ markedly with regard to their needs to be in an attractive milieu (ADDBEA). The appeal of the design of a pack will be an important consideration to types that feel strongly on these aspects (see Table 9.31).

10.3.2 POLITICS

Politicians can gain insights into the needs and motivations of the value types and the reasons for the interest in different parties (see Table 9.46). Such an analysis can show which policies are most likely to be appropriate and find favour with different sectors. It can also aid in the development of effective communication strategies.

10.3.2.1 The Reconstruction and Development Programme (RDP).

The African National Congress (ANC) (1994) in its policy framework, published just prior to the April 1994 election, gave special attention to housing, water and sanitation, with the long-term objective of providing these to all South Africans, together with the provision of electricity through an accelerated programme (Ibid.).

The aim of the RDP was to provide, as a minimum, durable housing, with protection from the elements, sanitary facilities, electrical or solar energy and the ready availability of clean water through an integrated and sustainable programme. The RDP has been seen to have had benefits in the areas of the installation of electricity, access to water, education and housing (Corder, 1997). However, despite progress, large numbers of South Africans still do not enjoy basic housing with electricity and running water (see Table 9.43).

The key priority of the African National Congress as set out in its policy document was to alleviate poverty and deprivation (African National Congress, 1994). Insights into the causes of poverty can be gained by looking at single source data, such as Sociomonitor 1997/8, where it is possible to examine the interactions between values, demographics and living standards,

including access to services, for the different types.

10.3.2.2 Race relations

Good relationships between people from different ethnic backgrounds are essential for a peaceful and successful South Africa. Those who share common values, as have been identified in the value types, are more likely to live in harmony. Clashes between different values can be averted, or at least reduced, where there is comprehension of both differences that could cause friction and similarities that would bring people together.

10.3.3 RESEARCH

In the past South African research has often been characterised by a focus on understanding the differences between various ethnic and language groups. This paradigm can now be replaced with a more comprehensive and meaningful way of looking at the population. Future investigations can be planned within a theoretical value framework that offers potential to add an exciting new dimension to the interpretation of other variables.

10.3.4 SCENARIOS

Values are an important input in the development of scenarios (Schwartz, 1991), which should consider alternative futures rather than variations of a single premise (Schoemaker, 1995). They should be regularly monitored (Vulpian, 1980).

It has been demonstrated that scenarios derived from the measurement of South African values can have validity (Corder & Hoets, 1983). The rate of change of value types has also been used to make predictions of their occurrence in the future (Corder, 1993). However, in terms of social and political developments Etzioni (1991) advised that it is only possible to think 10, or possibly 20 years ahead. Even the feasibility of predicting ten years ahead in South Africa is presently in doubt given the uncertainty of the economy and the impact of AIDS, which is now considered to

be out of control (Corder, 2000b). Estimates about the current incidence of HIV and AIDS vary extensively, but it is expected that even by 2010 the epidemic will still not have reached its peak (Love Life, 2000). Despite the volatility in the current social environment, values and their changing intensity can provide a valuable input for scenario planning.

10.4   IMPERATIVES FOR FURTHER RESEARCH

10.4.1 FREQUENCY OF MEASUREMENT

Values usually alter slowly. They are deep-seated and persist through life, though likely to be modified by circumstances such as marital status, family responsibilities, occupation and changing socio-economics. Under normal conditions values do not need to be frequently measured. However, the influence of a new political dispensation, superimposed on an already dynamic environment, is leading to accelerated social change. Over a decade ago, Bethlehem (1988) predicted that exponential structural changes in demography, urbanisation, housing, education and economic participation would be inevitable and dramatically alter the character of South Africans before the end of the twentieth century.

Of particular concern is the large number of Todayers who are a potential risk to the stability of the country. It is important to track the size of this group and to gain a clearer understanding of its dynamics. Research could explore the interactions between destructive, selfish inclinations and other variables, such as education, employment and family life. If a causal relationship could be found between the external environment of Todayers and the values held, then it should be possible to identify areas that could be given most attention to reduce the risk this type poses to society.

Taking these circumstances into account it is recommended that values be measured at least every two years.

10.4.2 EXTENSIONS TO OTHER COUNTRIES AND COMMUNITIES

Consideration could also be given to extending the measurement of values to other African countries with a view to testing whether, as was found in South Africa, that there are people from different ethnic groups who share common values. This will become even more important when national boundaries are eroded due to globalization (Davidson & Rees-Mogg, 1997).

Research on values can also be applied to small communities, particularly when there is a conflict situation and a need to work together. If shared values can be identified then a focus on these has the potential to bring people together.

10.5 CHAPTER SUMMARY

This final chapter has concluded that there is considerable similarity between the values held by different ethnic groups living in South Africa. This finding has wide-scale implications for marketing, politics and research.

In marketing the major uses outlined were in segmenting markets, identifying, describing and understanding target groups, establishing needs and optimising means of communication.

In the political field the implications for policy formation, communication and the Reconstruction and Development Programme, were delineated. It was considered that in formulating scenarios values should be taken into account.

Imperatives for further research included the extension of the study to other African countries and communities, especially with a view to testing the basic proposition that there are fundamental similarities in the values of humankind within a common framework.

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APPENDIX A - DEFINITIONS OF COMMON HUMANKIND VALUES

ADDBEA - adding beauty

Desire to add beauty to homes, townships and surroundings.

BLUSEX - blurring of the sexes

Accept blurring of sexist roles, allow similarities between men and women.

CONSUM – consumerism

Consumerists' suspicions of manufacturers, and search for guarantees of quality.

CONVEN – convenience

Preference for convenience products and labour saving devices.

ECOMIN - economy minded

Economy minded about spending money, looking for cheaper items.

EMOEMP - emotional empathy

Emotional empathy towards and with others.

FAMLSM - familism

Belief in a family centred lifestyle.

LIBSEX - liberal sex attitudes

Liberal attitudes to sex, belief in individual choice.

LIVTOD - living for today

Living for the present, without thinking or planning for the future.

MEAWOR - meaningful work

Desire for stimulating, meaningful employment, even if less financially rewarding.

NATIDE - national identity

Sense of national identity and of being South African.

NOVCHA - novelty and change

Seek and enjoy novelty and change, attracted to new advertising claims, products and designs.

ORIPAS - orientation to the past

Oriented towards the ways and traditions of a past that is remembered to be better than the present.

PERSON - personalisation

Overt personalisation of products and brands in order to boost one's image.

PERCRE – personal creativity

Pleasure taken in handicrafts and making things oneself.

PHYHEA - physical health

Concerned to achieve and maintain a healthy body through exercise and a healthy diet.

RACHAR - racial harmony

Desire for racial harmony and acceptance of integration.

REJAUT - rejection of authority

Rejection of conventional authority and adherence to one's own rules.

RIGDTY – rigidity

A belief in rules and a preference for order and routine.

SELENH - self-enhancement

Putting effort into appearance and belief that looks are important.

SELIMP - self-improvement

Self-improvement through education, learning new things and leisure activities.

SENSEK - sensation seeking

Pursuance of risky, exciting and spontaneous activities.

STATUS - status

Desire for status achieved through materialism, qualifications and position.

USESTI - use of stimulants

Use of stimulants, seeking drugs, music to cope with life and improve one's mood.

APPENDIX B - DEFINITIONS OF VALUES, MARKETING TRENDS AND ISSUES

ADDBEA - adding beauty (VALUE)

The desire to be in an attractive environment, and spend time, money and effort to achieve this.

ACHMNT - achievement (VALUE)

A measure of the importance of ambition and success.

AFRICU - African customs (VALUE)

Adherence to African cultural customs and traditions.

AIMLES - aimlessness (VALUE)

A sense of hopelessness and a lack of purpose.

BELAPP - belonging and approval (VALUE)

The need to belong, and be approved of, restraining one's own individuality in order to fit in.

BLUSEX - blurring of the sexes (VALUE)

The acceptance and endorsement of equality between men and women.

BRDEQI - brand equity (MARKETING)

The acknowledgement that some brands are more special than others.

BRDEXT - brand extrinsics (VALUE) (MARKETING)

Using particular brands and products to boost self-image and to be accepted and admired.

COMDEV - community development (ISSUE)

Interest and involvement in the development and concerns of one's neighbourhood and community.

CULCUS - cultural customs (VALUE)

Adherence to, preference for and preservation of own culture, language, religion, or race.

CUSREL - customer relations (MARKETING)

Customers are increasingly discerning and demanding about the service they receive, and more and more would like to be treated on a personal basis.

DOSELF - do-it-yourself (VALUE) (MARKETING)

Satisfaction from doing and fixing things oneself.

ECOMIN - economy minded (VALUE) (MARKETING)

The tendency to use lower prices as a major determinant in choosing between brands or outlets.

EMOEMP - emotional empathy (VALUE)

A willingness to become involved with the emotions of other people and to understand and empathise with their feelings.

ENTITL - entitlement (ISSUE)

A belief that one is a victim of circumstances and therefore one is owed.

ENVCON - environmental consciousness (ISSUE)

A belief that the natural environment is being destroyed and action should be taken to ameliorate this.

IMMEDI - immediacy (MARKETING)

The desire for immediate need satisfaction.

FAMLSM - familism (VALUE)

The family is a major focus in life.

FEACRI - fear of crime (ISSUE)

The impact of crime on behaviour and freedom.

LIBSEX - liberal sex attitudes (VALUE)

Liberal attitudes towards sex, sexuality, and sexual preferences.

LIVTOD - living for today (VALUE)

The enjoyment of life now and not thinking of, or planning for, the future. Living for the moment.

MATLSM - materialism (VALUE)

Overt material success.

MEAWOR - meaningful work (VALUE)

A preference for interesting, stimulating work that offers satisfaction, over that which offers security or good remuneration.

NATIDE - national identity (VALUE)

Pride in being South African and identification with the nation.

NICMAR - niche marketing (MARKETING)

Increasing desire to be marketed to personally, rather than en-masse.

NOVCHA - novelty and change (VALUE) (MARKETING)

Seeking and enjoying whatever is new or different.

OPTIMI - optimism (ISSUE)

The measure of confidence and optimism about the political and economic future of South Africa.

ORIPAS - orientation to the past (VALUE)

A nostalgia for the past, and a resistance to moving with the times.

PERSON – personalisation (VALUE) (MARKETING)

Using particular brands and products because of their intrinsic qualities. A personal choice.

PHYHEA - physical health (VALUE)

A proactive approach to health and fitness.

PROTST - protest (ISSUE)

Group protest is an effective way of getting what one wants.

RACHAR - racial harmony (VALUE)

A belief that there should be racial harmony and integration.

REJAUT - rejection of authority (VALUE)

A rejection of conventional authority and rules.

RELTEC - relate to technology (VALUE) (MARKETING)

Desire to keep up with the latest technological and scientific innovations.

RETNAT - return to nature (ISSUE)

Rejection of the stresses and unnaturalness of modern living, in favour of a more natural and wholesome way of life.

RLGION - religion (VALUE)

Conventional or established religious beliefs play a pivotal role in one's life.

SELENH - self-enhancement (VALUE)

The belief that appearance is important and worth spending money and effort on.

SELIMP - self-improvement (VALUE)

Enhancing oneself by spending time and effort to learn and do new things.

SENSEK - sensation seeking (VALUE)

Enjoyment and pursuit of exciting and risky activities.

STATUS - status (VALUE)

The need to be looked up to and respected because of one's social position.

UBUNTU - ubuntu (VALUE)

A way of life incorporating community involvement, respect and empathy for others, adherence to traditions, and accordance of dignity to others.

USESTI - use of stimulants (VALUE)

The tendency to rely on stimulants or relaxants to boost one's confidence, to relax, or to cope.

VIOAGG - violence and aggression (VALUE)

Using violence and aggression in order to cope, to get one's own way, or to dominate others.

APPENDIX C – CORRELATION MATRIX

The correlation for the 32 trends based on the normalised scores of the values for all respondents is given below. A compact correlation matrix with decimal points omitted, where 10 indicates a correlation of 1.0 and 1 indicates a correlation of 0.1, is also provided.

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APPENDIX D – FACTOR ANALYSIS

The results of the 3, 4, 5 and 6 factor solutions for Sociomonitor 1997/8 are given below.

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