



MARKETING RESEARCH
FOUNDATION

PLUS 94
RESEARCH

MAPS

MAPS WEBINAR:
July '20 – June '24



NOVEMBER

20
24

186

Interviewers in field

20 000+

Interviews conducted per year

10 000+

Leave-behind questionnaires per year

Stratified Random Sample
All Provinces
All Districts
All Municipalities

Sample Distribution



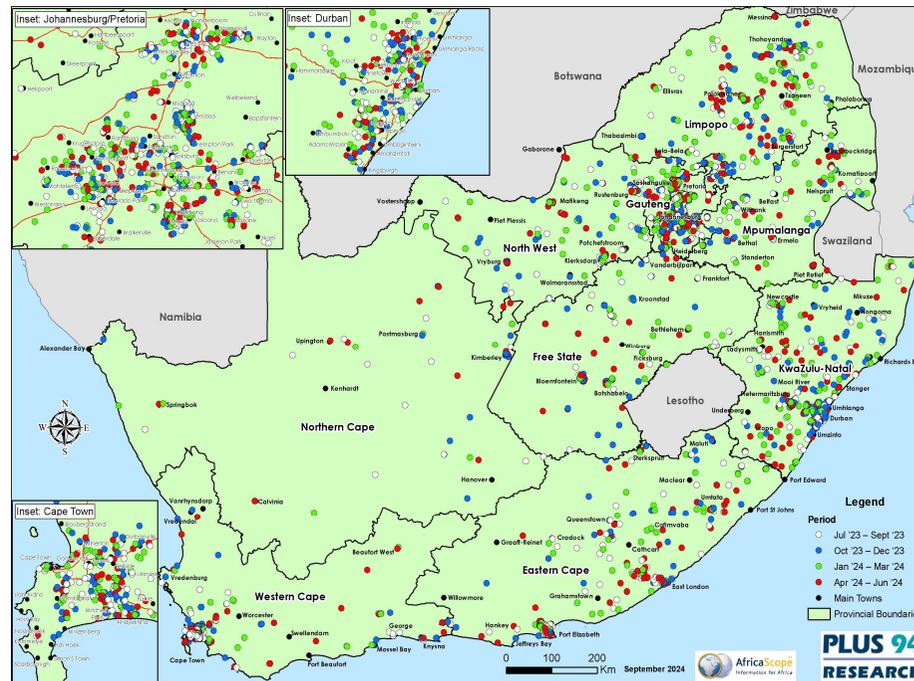
50%
METRO



30%
URBAN



20%
RURAL



Categories

Demographics | Segmentation | Equipment and devices in HH | Property & Home/spend | Home maintenance/DIY/Improvements & spend | Internet interaction | Appliances – Brands and store purchased | Furniture and Home Décor | Clothing | Shoes | Apparel spend | Cellphones | Vehicles | Financial | Personal expenditure | Purchasing behaviour | FMCG consumption/ brands | Cosmetics | Fast Food – behaviour, consumption and outlets | Travel | Media | Malls | Leisure | Activities | Activities | Interests | Psychographics | Shopping – Purchasing behaviour/ Grocery stores/Liquor outlets/buying habits/volumetrics and spend/Clothing purchasing and stores/instore/online/spend | Property Ownership | Pet Ownership | Interests and Hobbies | Attitudes on current affairs Decision making on purchases | Financial behaviour | Online and in-store shopping | Grocery purchasing behaviour – bulk vs. daily | Clothing purchasing behaviour and expenses | Household appliances purchasing and decision making process

Media Interaction

Television - Linear/live TV watching | Viewed TV channels – P4W, P7D and Yesterday | Location of TV viewing | Satellite services/packages used | Type of TV decoder used

Radio - Radio stations listened to – P4W, P7D and Yesterday | Average number of days/hours spent radio listening per week | Commercial stations | Community Stations | Online listening

Print – Online and Paper – Newspapers | Newspaper Inserts | Magazines | Store Magazines

Cinema – Frequency | Average spend | Loyalty cards | Cinema visited – indoor/outdoor

Outdoor Advertising - Billboards – indoor, outdoor and digital | Branding/advertising on buses and taxis | Dust bins | street poles | Trailers | Digital screens | Inside Restaurants/nightclubs/schools incl washrooms | Spaza shops | Murals and Grafitti

Streaming – Netflix | YouTube | Showmax | etc

Social Media – facebook | WhatsApp | Twitter | etc

Online – Sites visited

Behaviour – Time spent | Multiplatform

Financial

Commercial banks | Banking products and facilities | Money transfer services | Loyalty/rewards retail store programmes | Medical aid schemes | Investments and saving | Short-term and long-term insurance policies | Other medical insurance | Purchase of items on credit and personal loans | Medical Aid | Behaviour (saving and loans) | Decision making | Funeral policies | Stokvels | SASSA government grants

Note: Brands measurement is dynamic. Brands measurement is increased in two ways:

1. Once 40+ respondents choose a brand, it is automatically included in the dataset and pre-coded in the questionnaire
2. Brands are added to the questionnaire on the request of subscribers



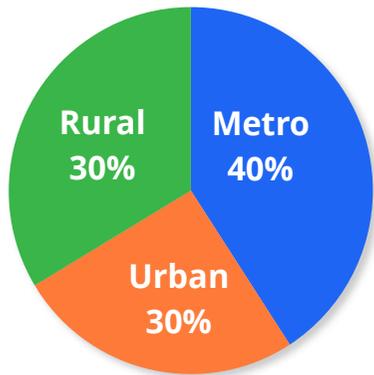
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Demographics

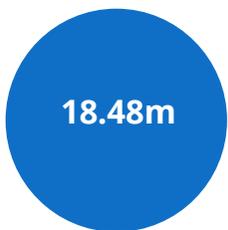


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Area Distribution



Households



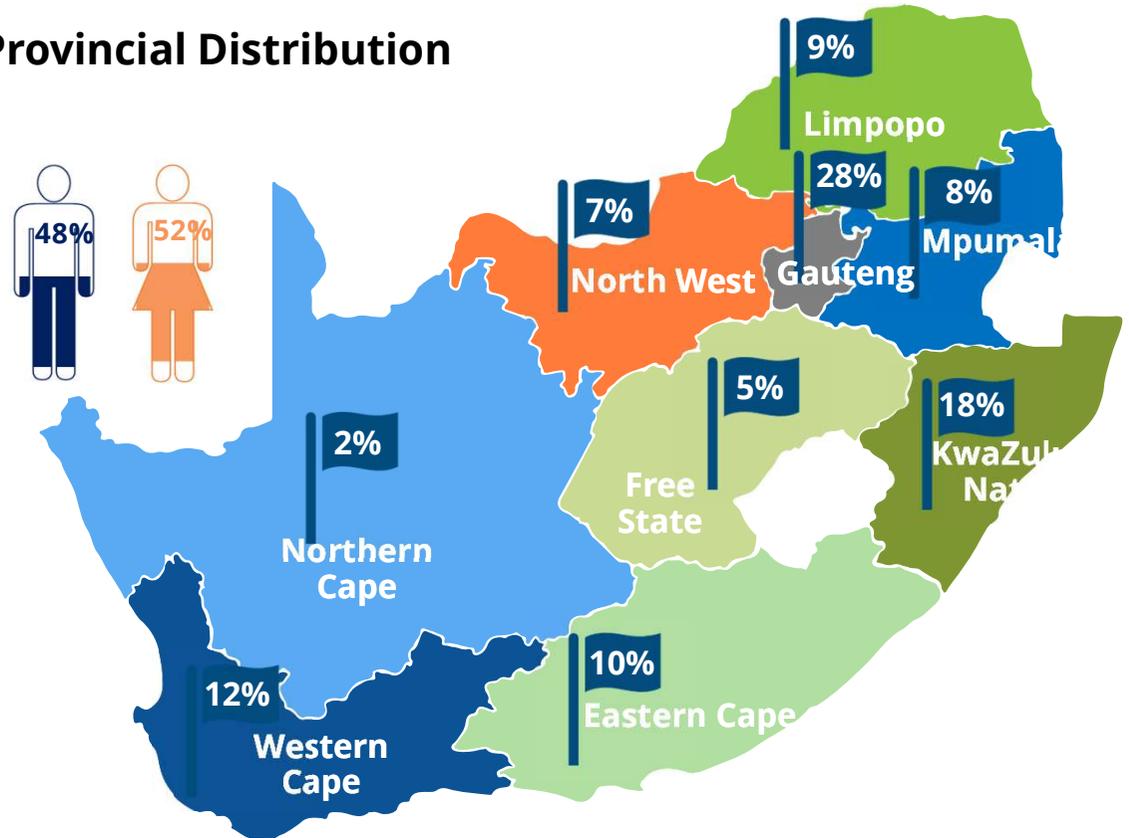
People per household



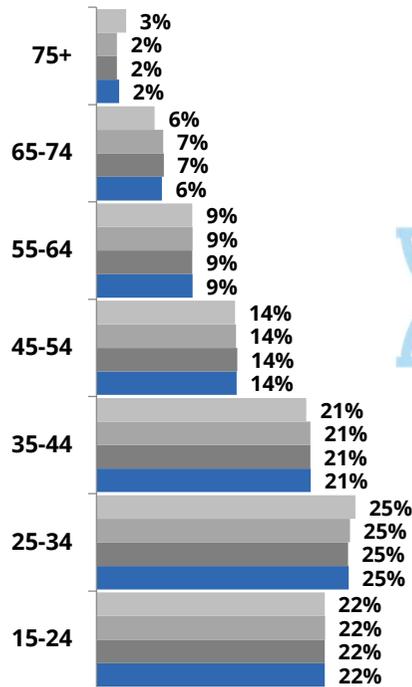
Dependants per household



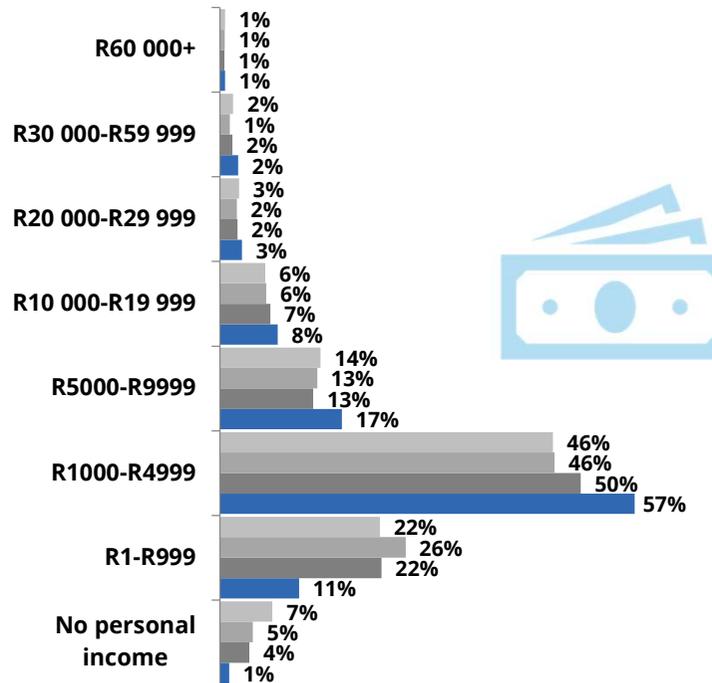
Provincial Distribution



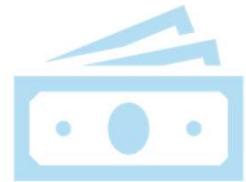
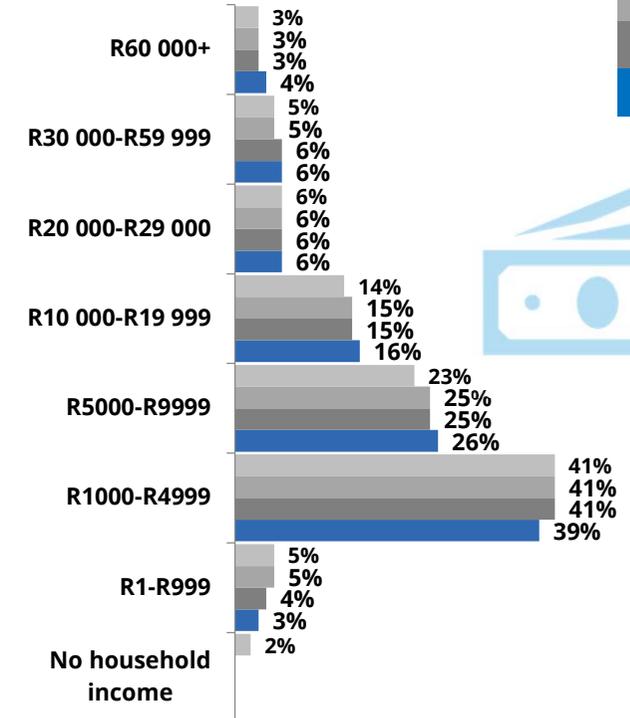
Age Groups



Personal Income



Household Income



Year 1
Year 2
Year 3
Year 4

Average age: 38

Average age: 38

Average age: 38

Average age: 38

Average Income: R 4 814

Average Income: R4 609

Average Income: R 4 813

Average Income: R5 974

Average Income: R 11 105

Average Income: R11 804

Average Income: R12 721

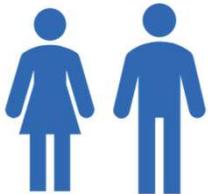
Average Income: R 13 006

Gender

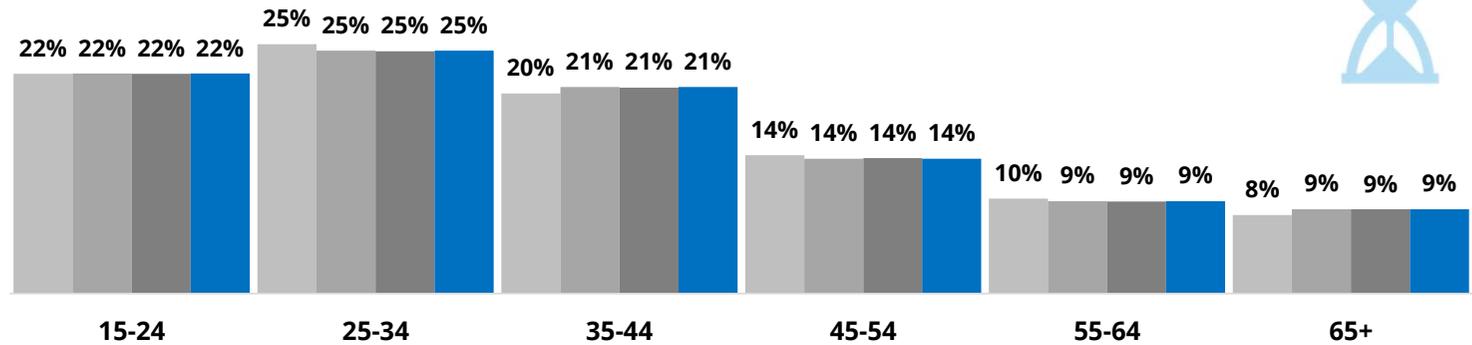


YEAR 1-4

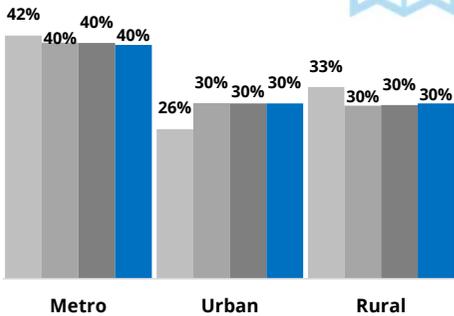
52% 48%



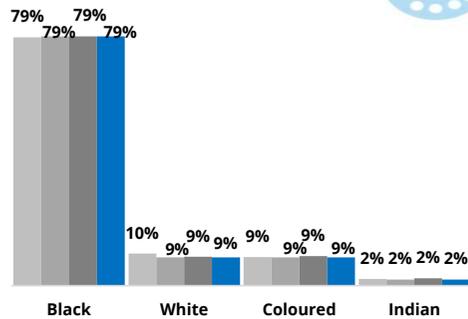
Age Groups



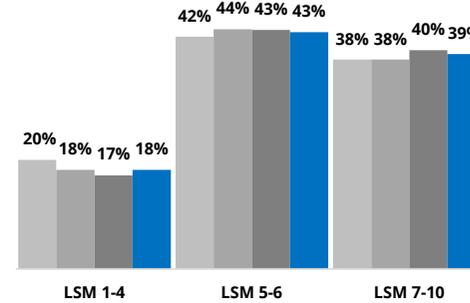
Area



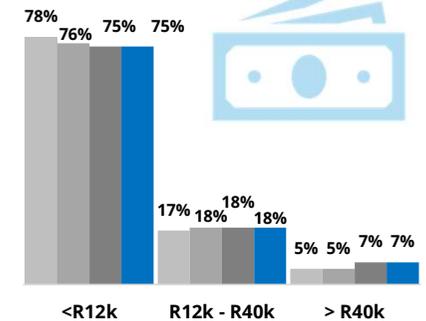
Race



LSM



Monthly Household Income





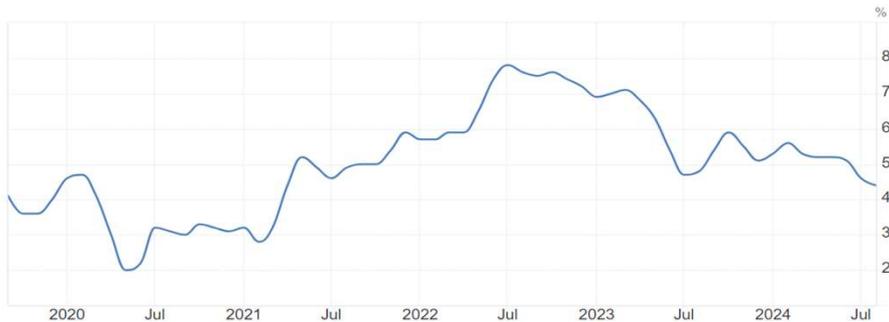
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Economic Landscape



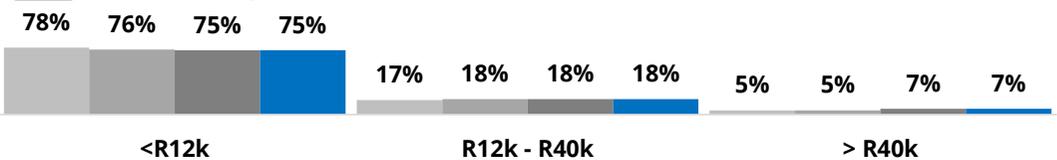
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South African Inflation Rate

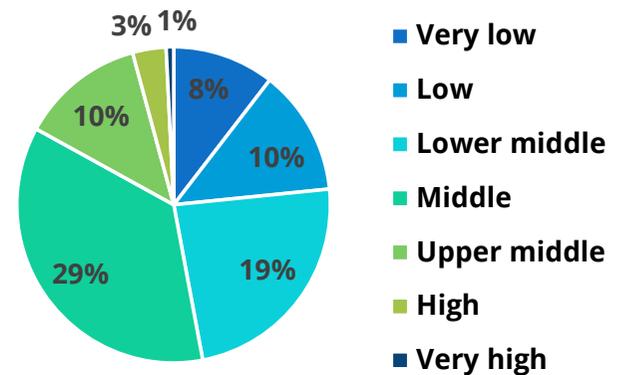


Source: Trading Economics.com

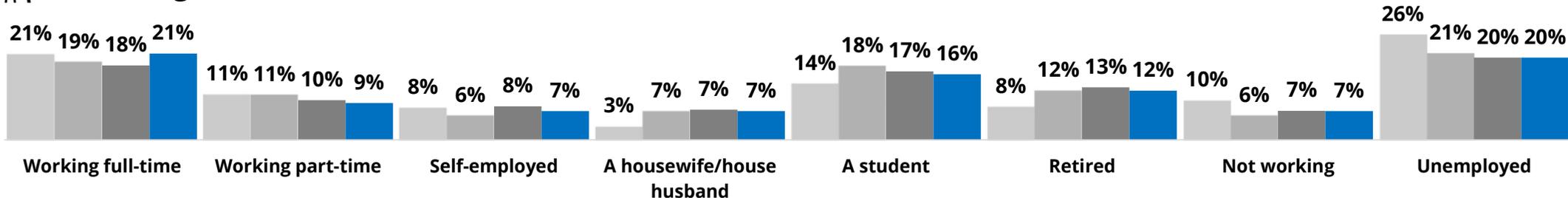
Monthly Household Income



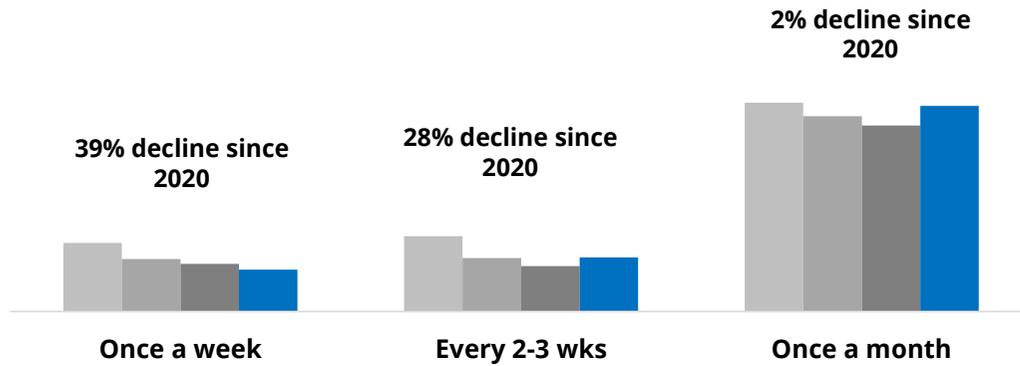
Which socio-economic class or group would you associate yourself with?



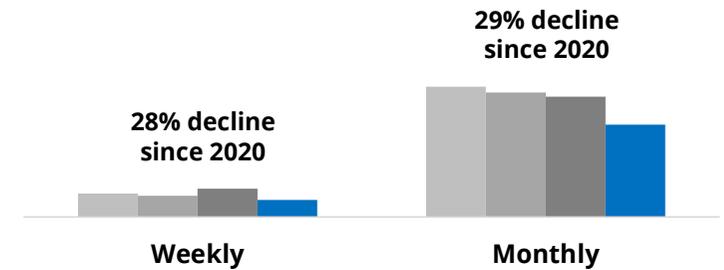
Working Status



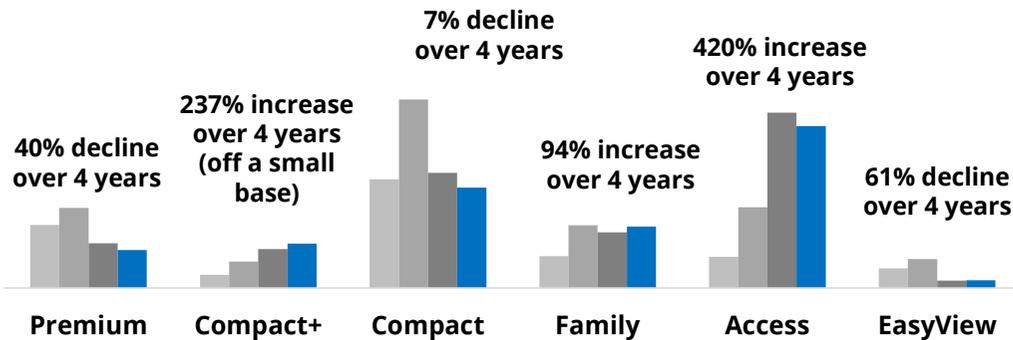
Fast Food – How Often



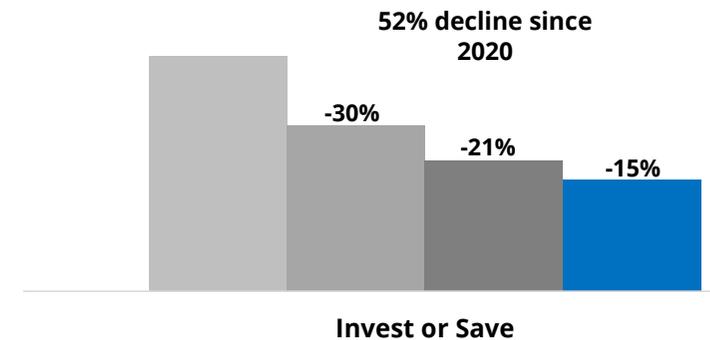
Eat Out– How Often



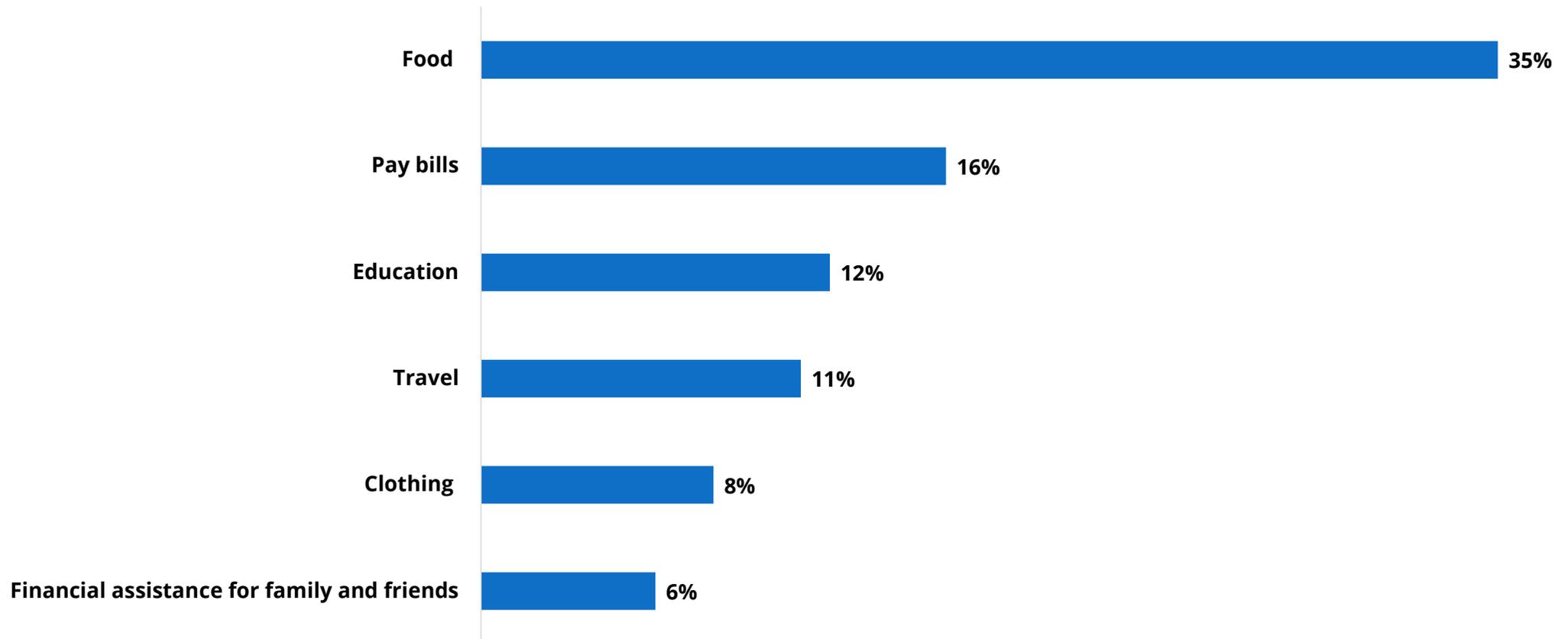
DStv Subscription



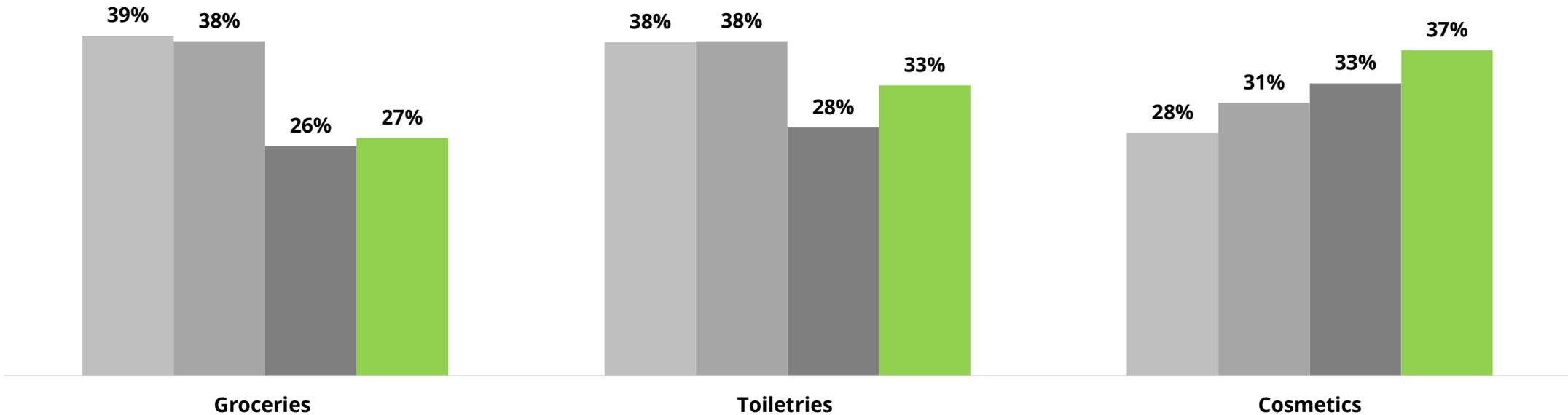
Save or Invest

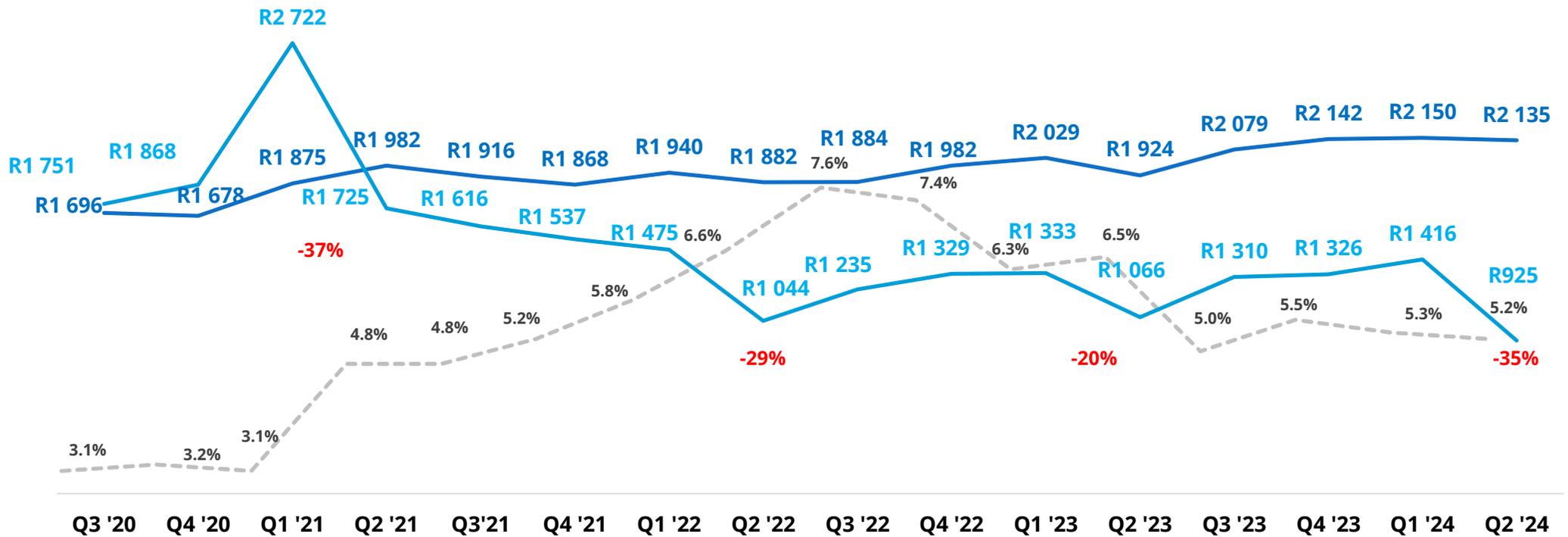


Top 10 Purpose / Reasons for Loans taken in P12M



Do you always buy the same brands?





— Groceries, toiletries

— Apparel (shoes, clothing and clothing accessories)

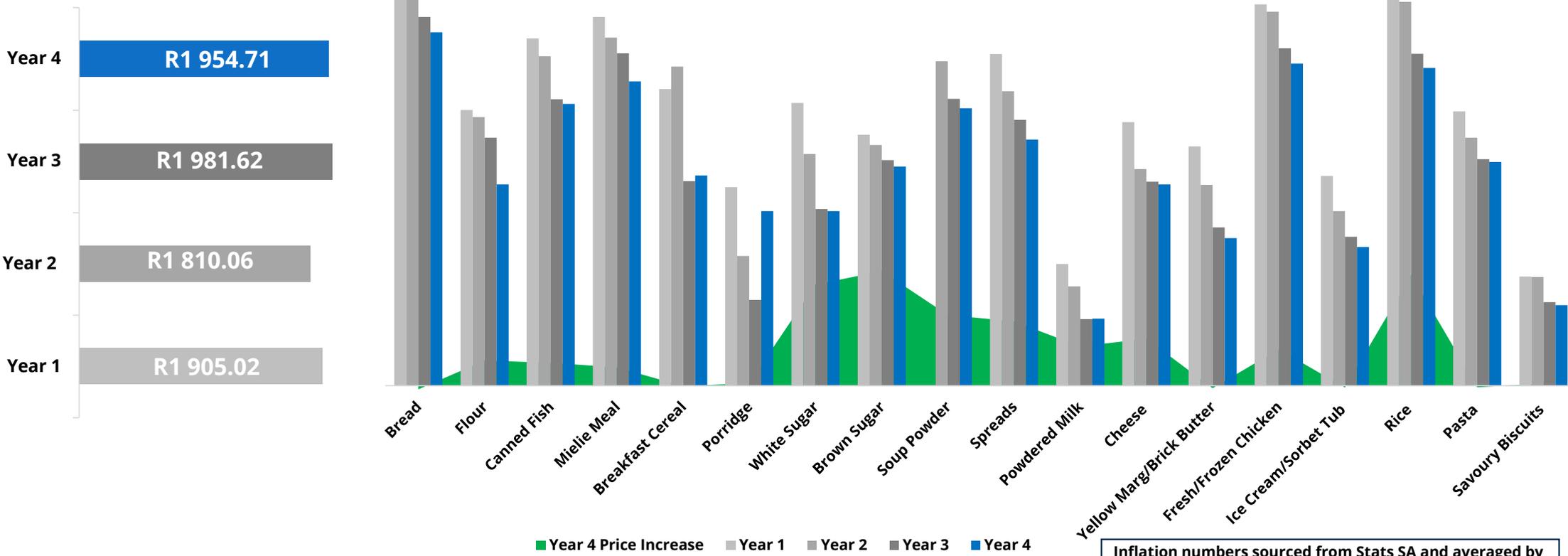
--- Inflation Rate

*CPI Inflation rate figures provided by StatsSA (January 2024) *apparel % decline

Average Amount Spent on Groceries **only** per Month

Food Items Bought Past 7 Days or Past 4 Weeks

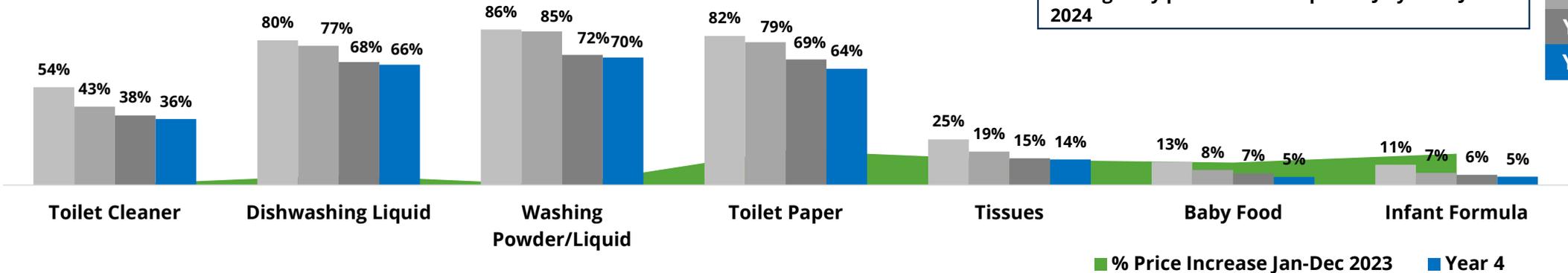
- Year 1
- Year 2
- Year 3
- Year 4



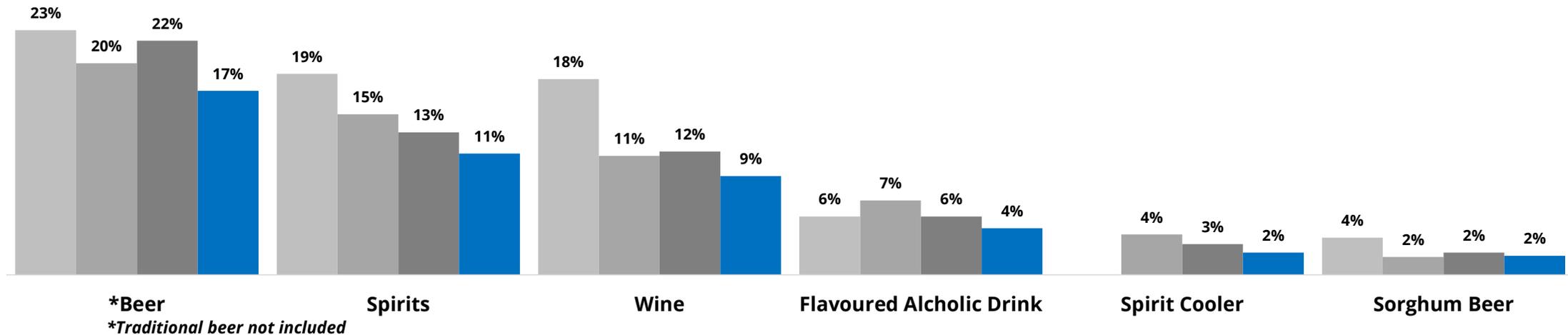
Inflation numbers sourced from Stats SA and averaged by product for the period July 2023-June 2024

Household Goods Bought Past 4 Weeks

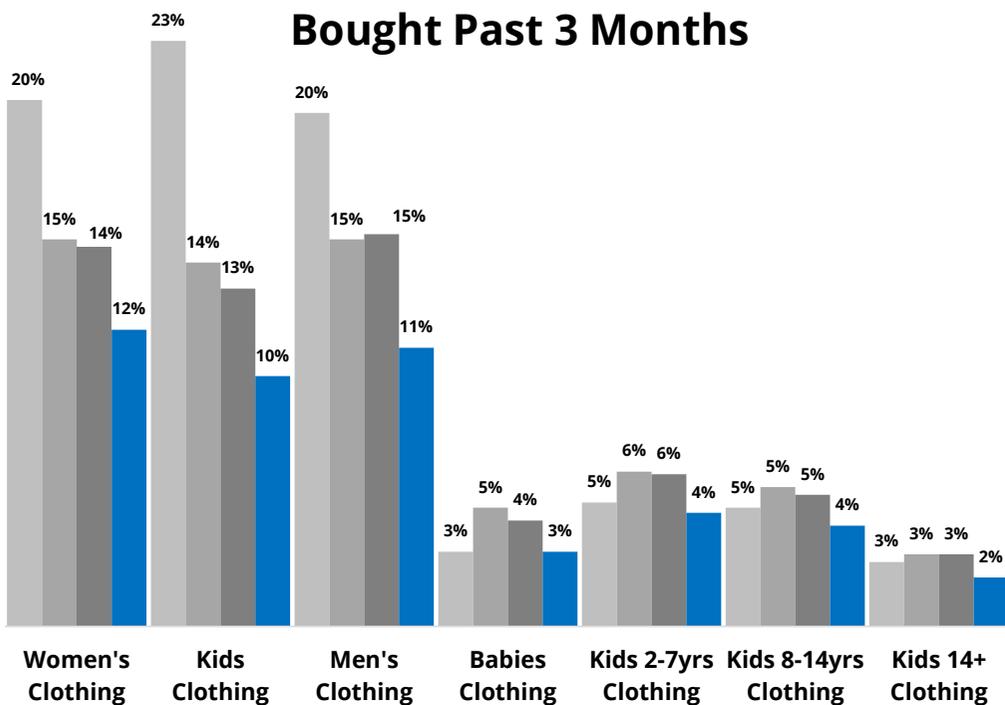
Inflation numbers sourced from Stats SA and averaged by product for the period July 2023-June 2024



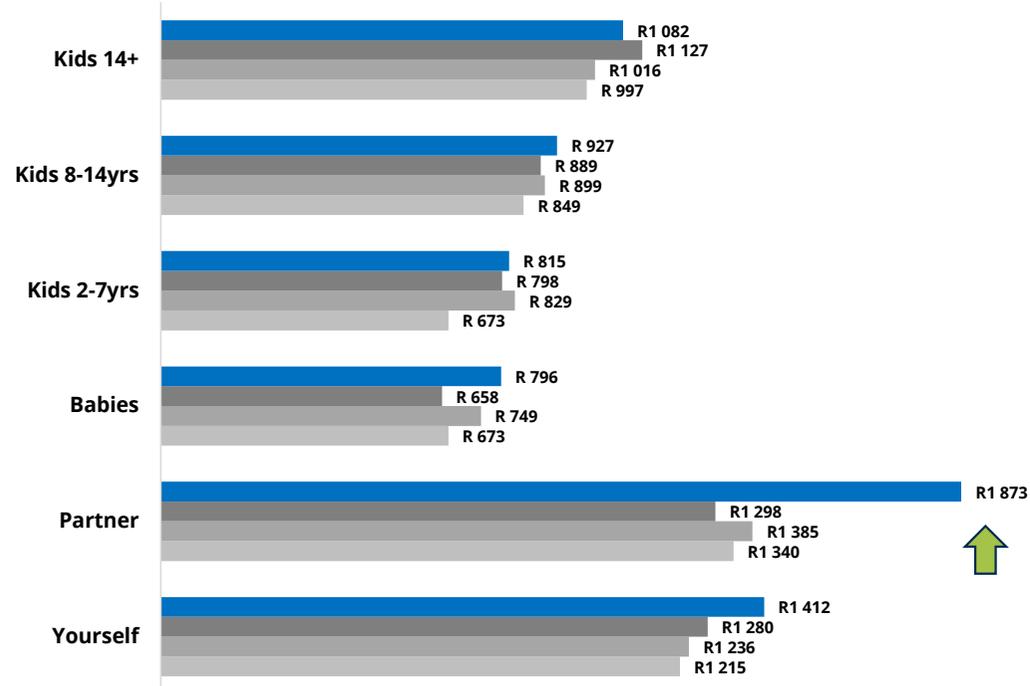
Alcohol Consumed P7D



Bought Past 3 Months



Average Amount Spent on Clothing Only P12M



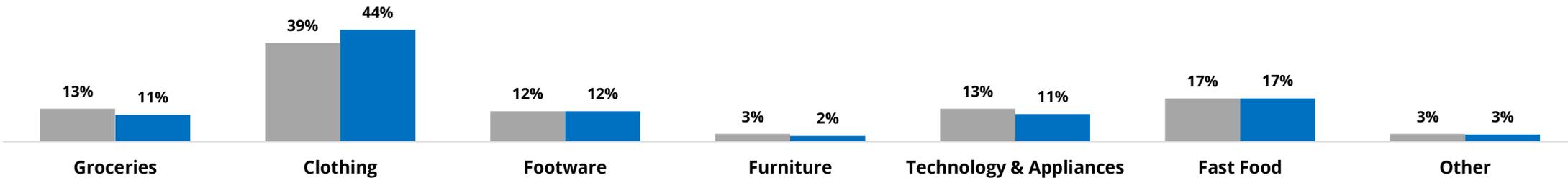
Within online clothing purchasing SHEIN is the retailer of choice

1,0m people purchased clothing online in the past month

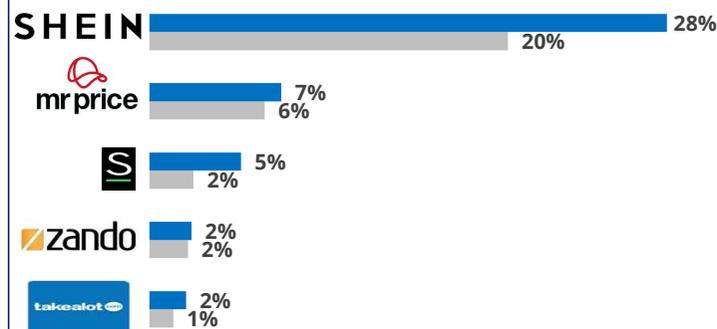
Year 3
Year 4

Notes:
Percentages rebased to Total Online Shopping Purchased P4W
Question was discontinued in Q4 2024 so only 2 quarters of data included in Year 4

Online Shopping: Purchased P4W

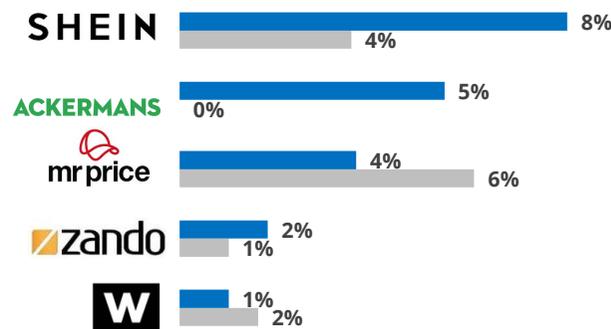


Top Online Retailers: Women



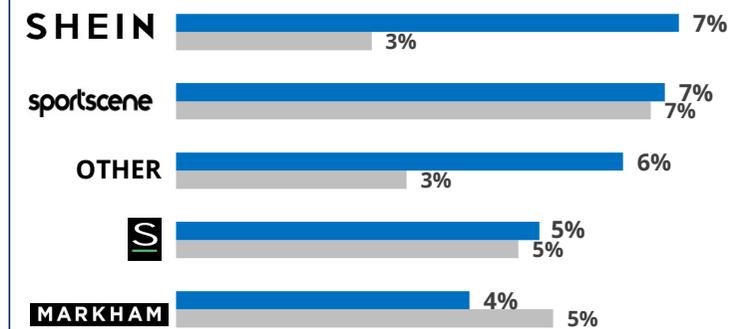
Filter: Online: How you purchased the items

Top Online Retailers: Children



Filter: Online: How you purchased the items

Top Online Retailers: Men



Filter: Online: How you purchased the items



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Media Landscape

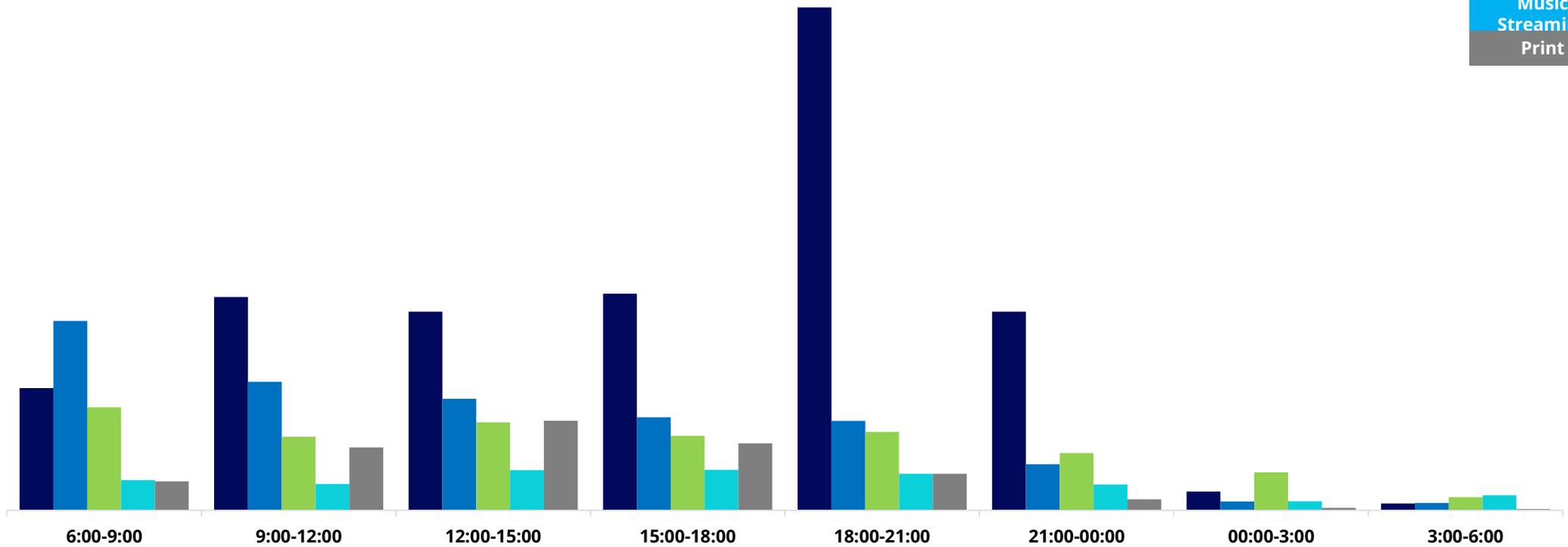


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Popular Time Slots (Weekday)

2024 Popular Times Slots

- All TV
- Radio
- Social Media
- Music
- Streaming
- Print



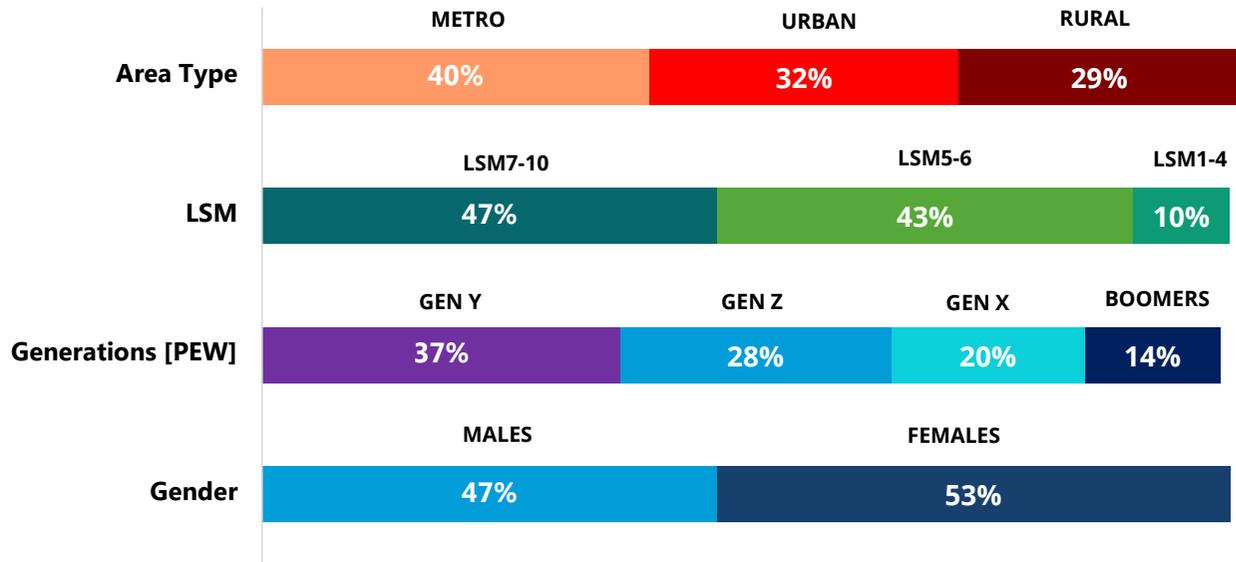
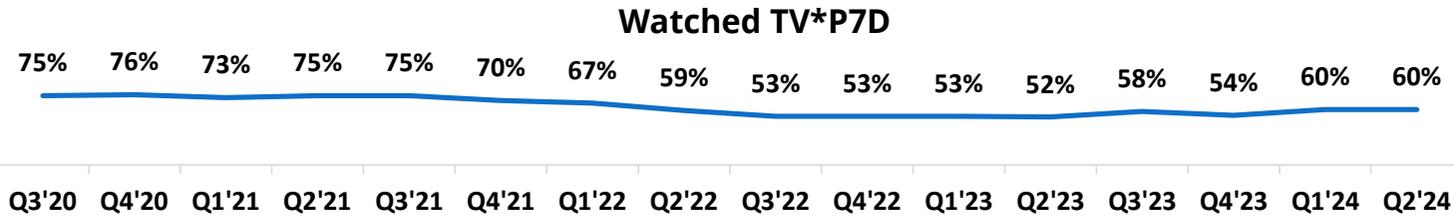
*Q1 '24 and Q2 '24 average

*Print includes magazines and newspaper

8.2M people spend **more than 20 hours** per week watching TV.

TOP 4 TV Channels Viewership

SABC 1	10.2M Watched P7D	↓
e	8.3M Watched P7D	↓
SABC 2	6.0M Watched P7D	↓
SABC 3	4.8M Watched P7D	↑

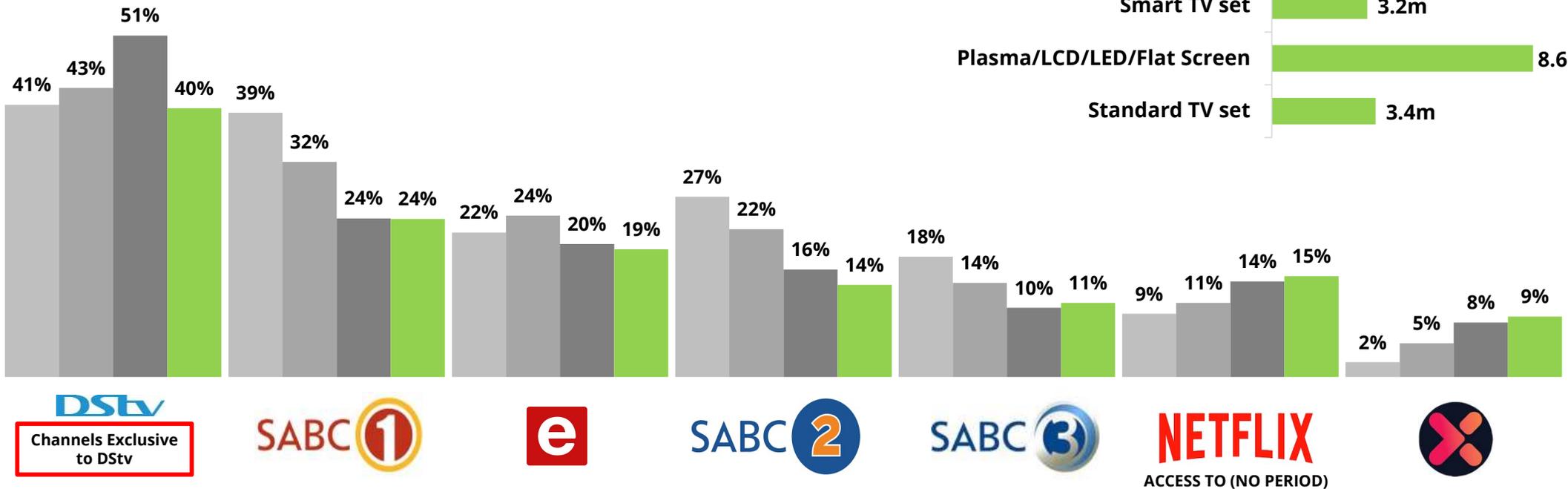


Television (P7D) Penetration **58%**

DSTV (P7D) Penetration **40%**

TV Penetration* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on N = 25 136 302

74% of HH own TV sets



DStv
Channels Exclusive to DStv

SABC 1

e

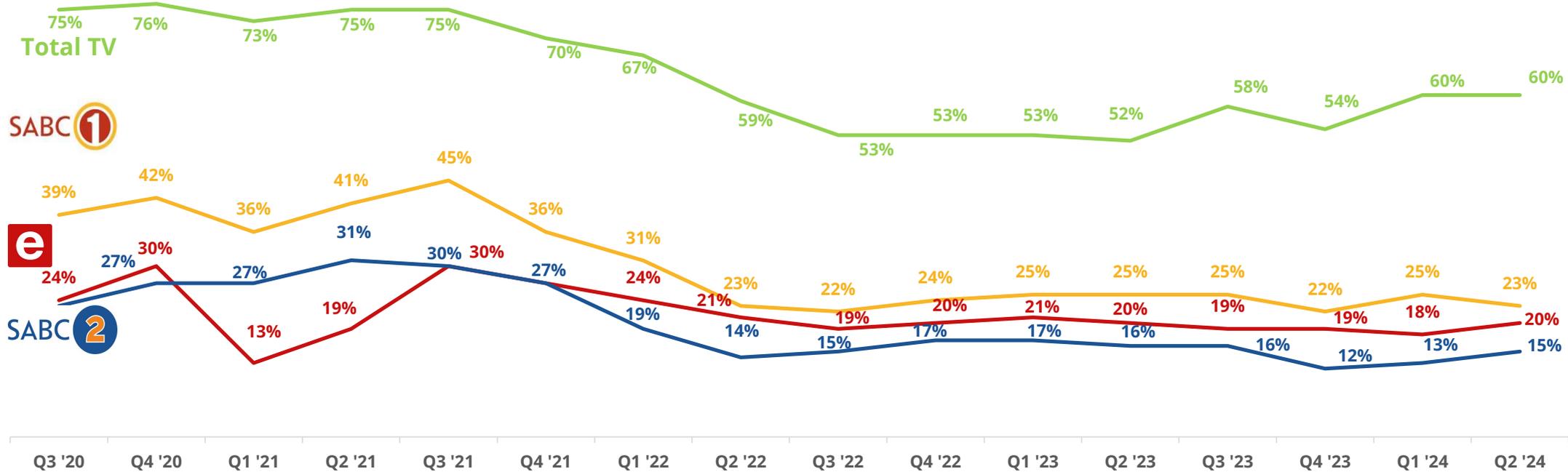
SABC 2

SABC 3

NETFLIX
ACCESS TO (NO PERIOD)



TV Channel Audience P7D



8.4M people have access to on-demand streaming services.

Top 3 Streaming services

NETFLIX

Access to Netflix 
6.7M

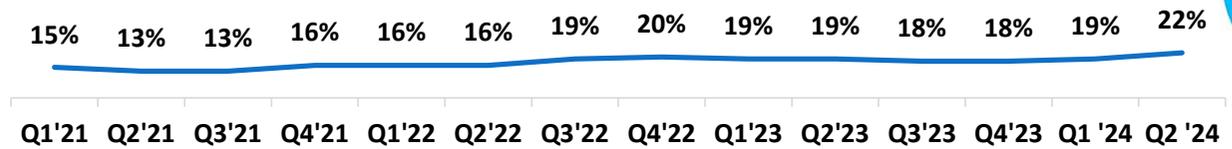


Access to Showmax 
4.0M

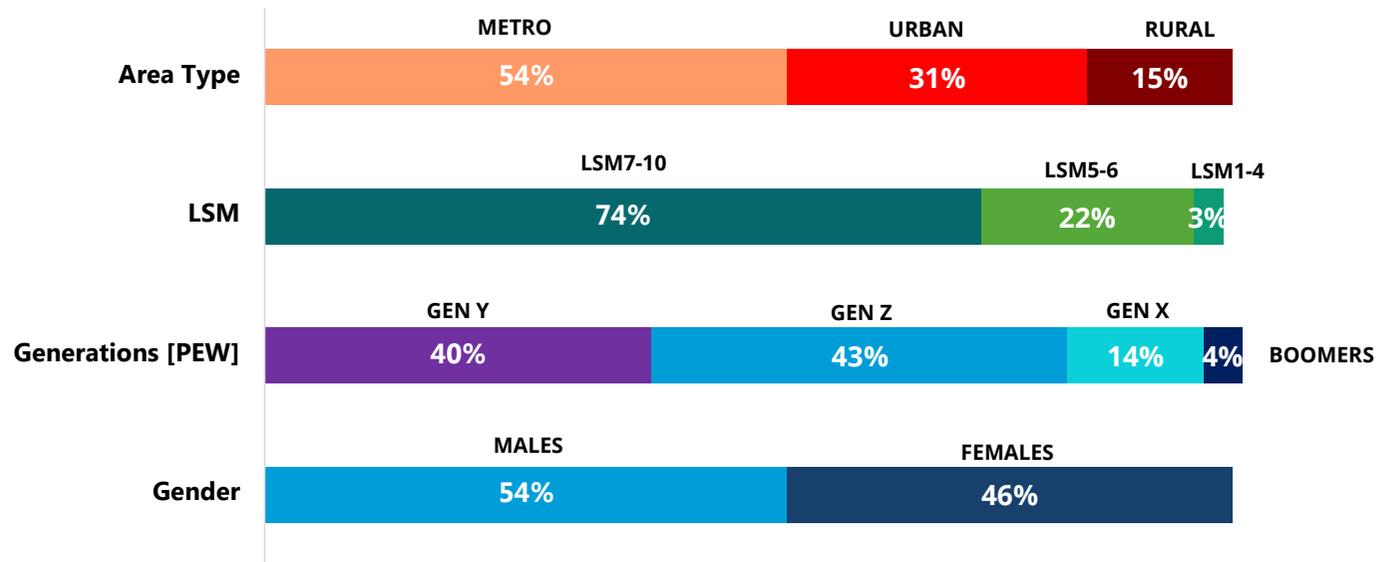


Access to YouTube (PAID) 
898K

On-demand streaming



Annual Streaming Penetration
19%



On-demand streaming Penetration* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on N = 8 072 102.

12.8M people watched video content in the P7D

Top 3 Social Media Sites P7D

facebook

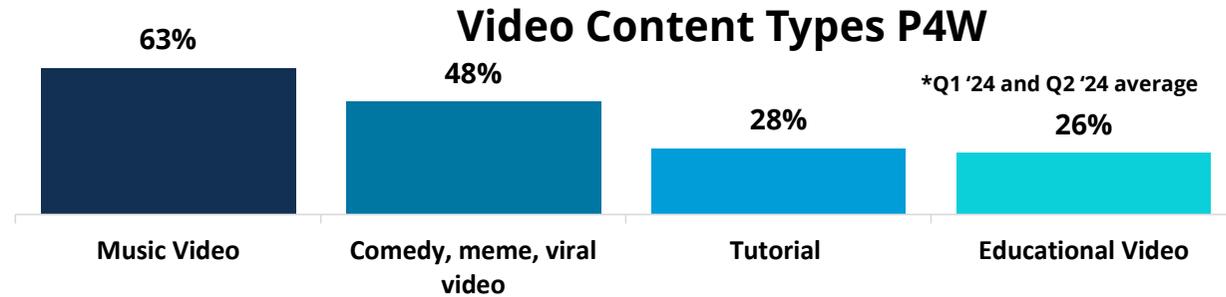
Visited Facebook
23.7M



Visited TikTok
8.7M

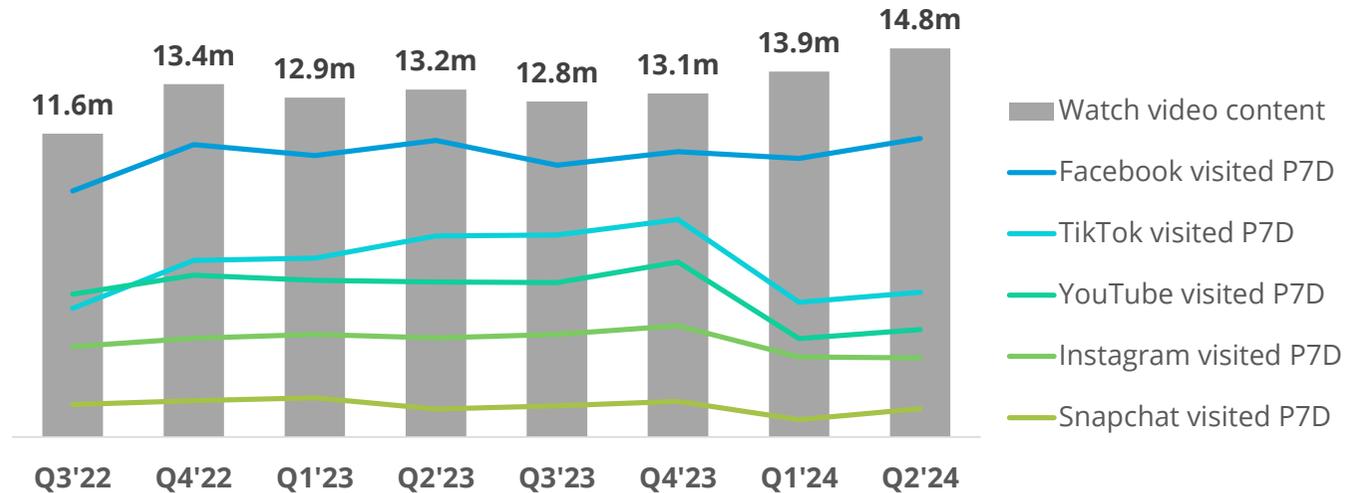


Visited YouTube
7.8M



Watched Video Content Per
35%

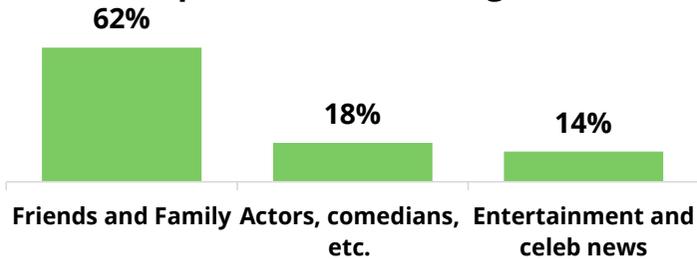
Filter: Video Content Viewed



13M South Africans spend **more than 20 hours** per week on social media.

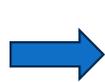
***40K** South Africans follow **influencers and other experts** on social media.

*Top 3 Social Media Pages followed



*Average of Q1 '24 and Q2 '24

P4W: TOP 3 SOCIAL MEDIA PLATFORMS



29M ↑

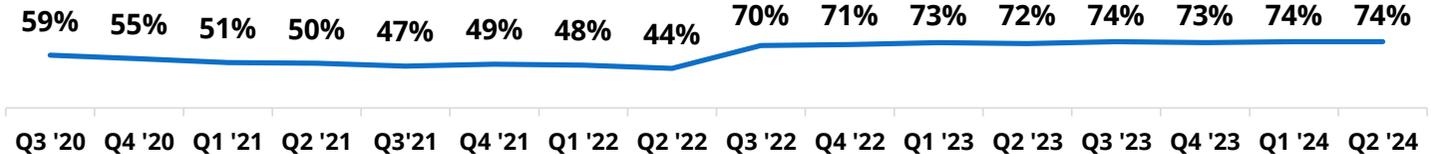
facebook 26M ↑



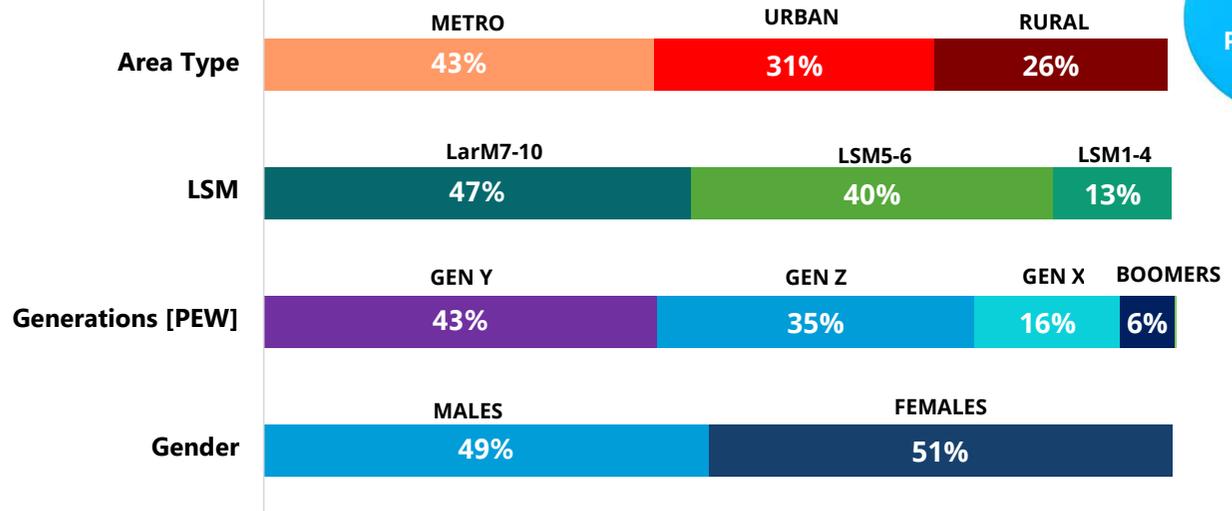
TikTok 12M ↑

N = 31 960 259

Social Media* P4W

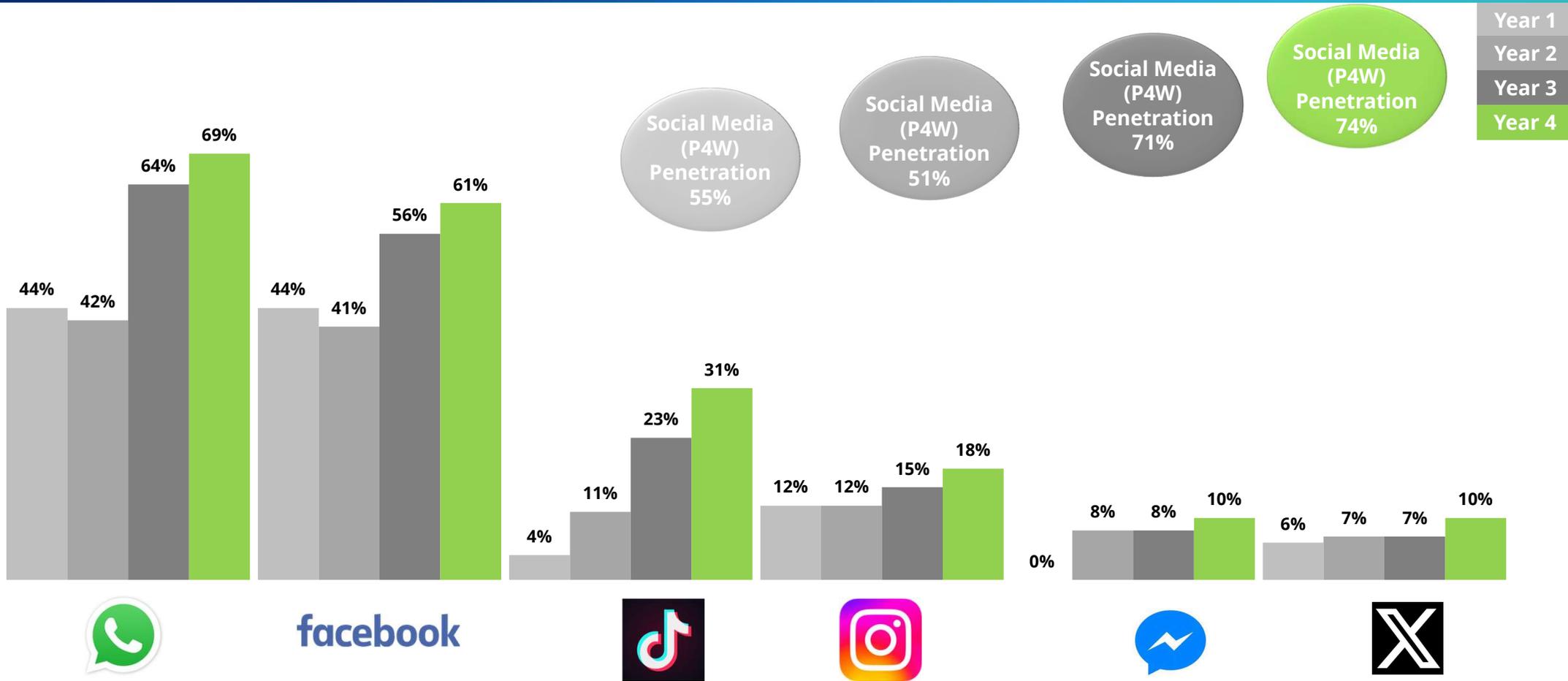


Social Media (P4W) Penetration **74%**

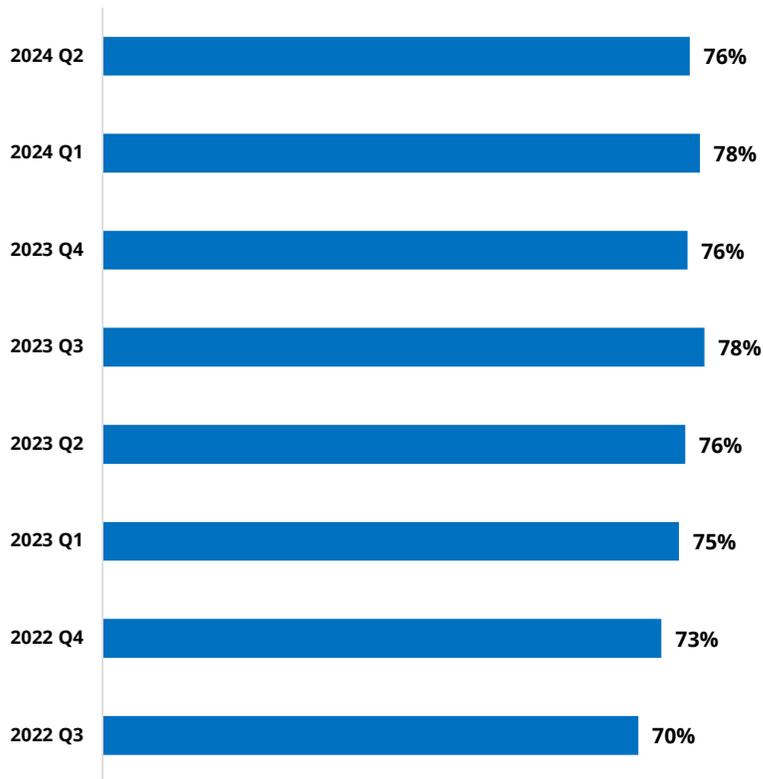


Social Media* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on N = 31 960 259

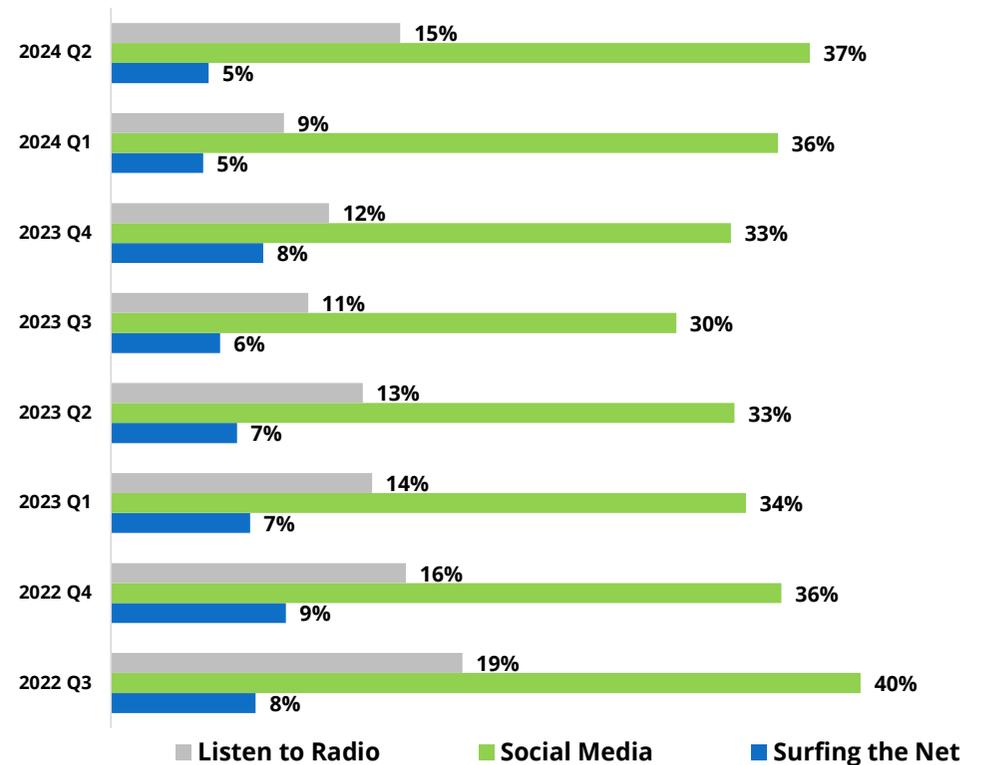
Social Media Shifts: % Pop YoY



Accessed the Internet in the Past 7 Days

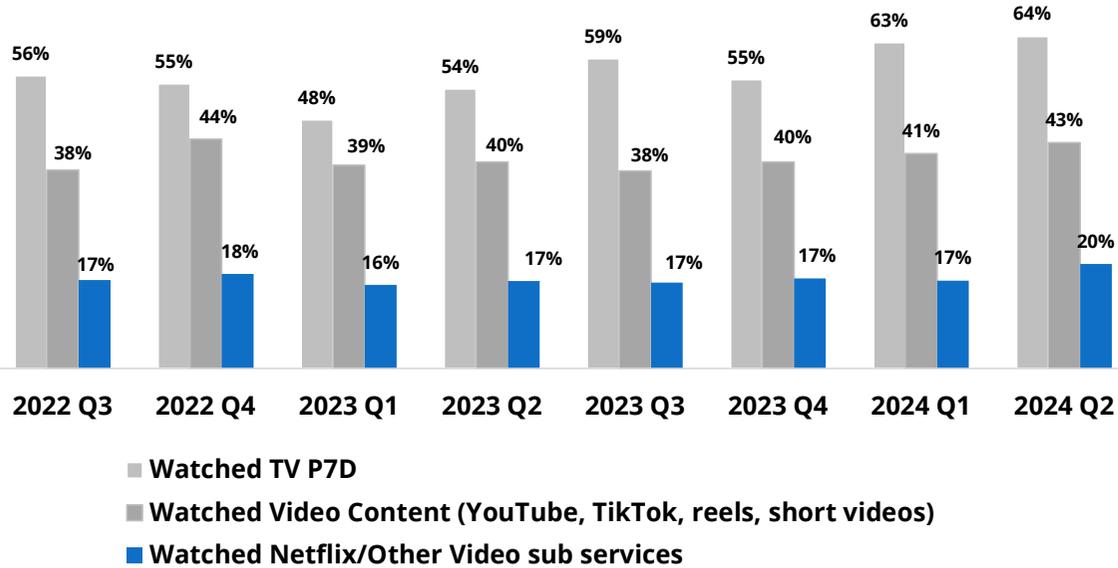


Multiplatform Behaviour
Other Activities While Watching TV



Total Population Video Content Viewing P7D

Filter: Accessed Internet P7D

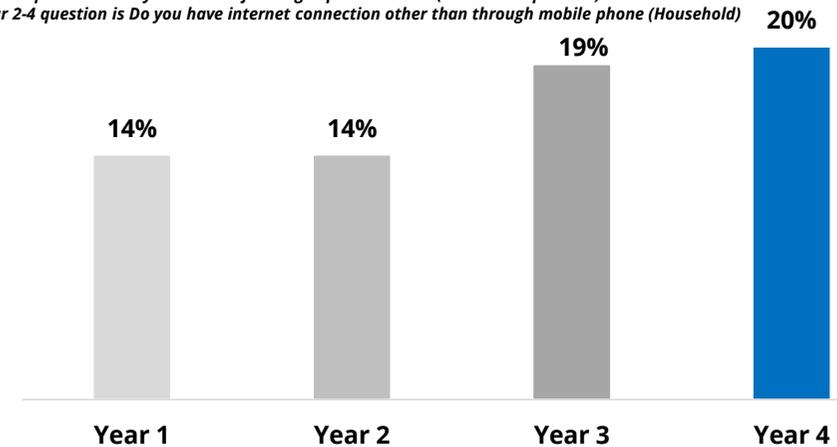


Internet Connection in the Home

Notes:

Year 1 question is Do you have Wi-fi or High Speed Internet (Household question)

Year 2-4 question is Do you have internet connection other than through mobile phone (Household)



3.9m Households now have fixed internet access, an increase of 64% increase between Year 2 and Year 4

88% of people who watched video content visited these social media platforms in the past seven days.



6.1M spend more than 20 hours per week listening to the radio

1.1M spend more than 20 hours per week listening to a podcast

18M listened to Commercial Stations (P7D)

4M listened to Community Stations (P7D)

53K listened to Internet radio stations (P7D)

P7D: TOP 5 Radio Stations



P7D
3.7M



P7D
2.3M



P7D
2.0M

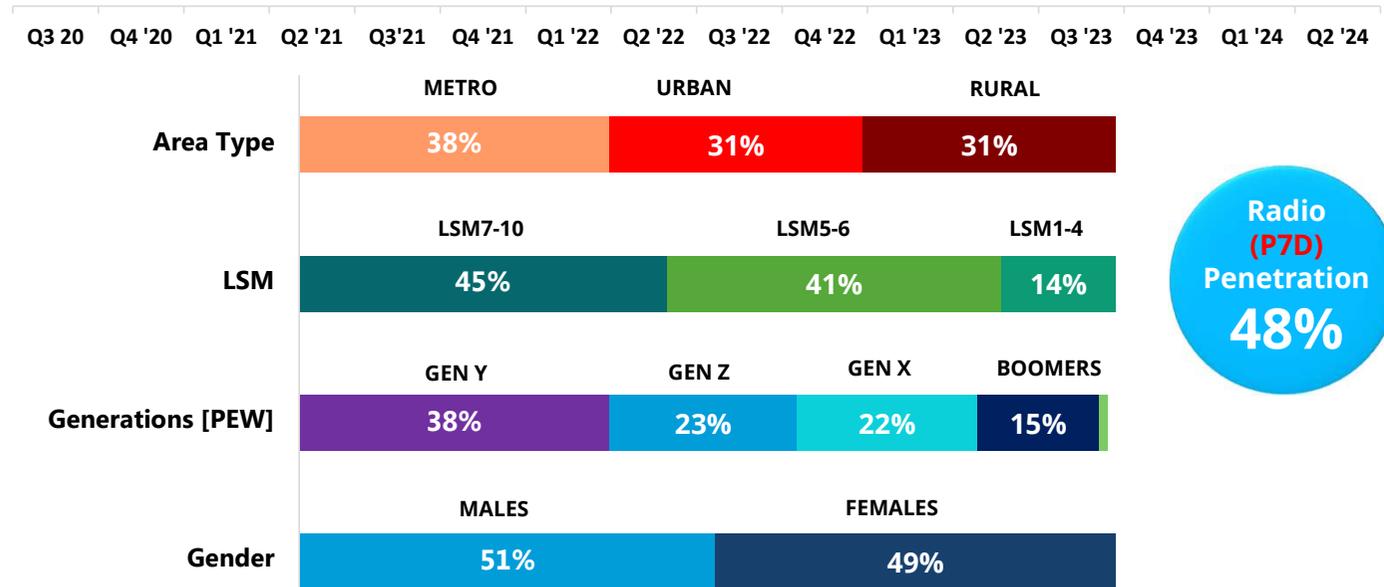
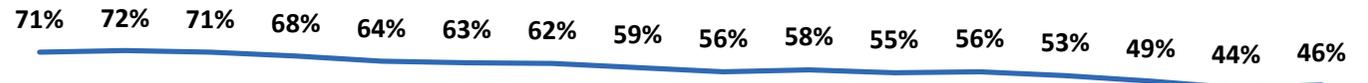


P7D
1.9M



P7D
1.7M

Listened to radio stations*P7D



Radio (P7D) Penetration **48%**

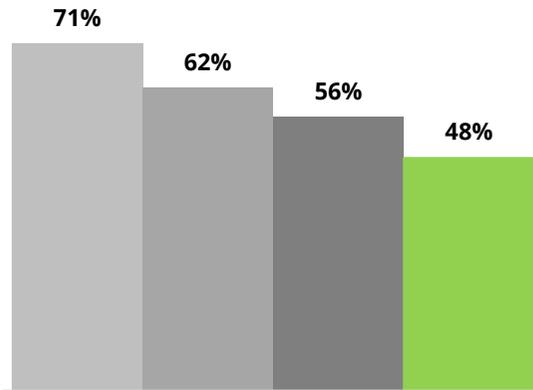
Radio Penetration* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on N = 20 767 693.

n=20 767 693

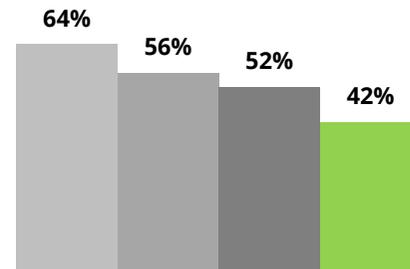
TOP 5 RADIO STATIONS P7D: % POP YOY

Year 1
Year 2
Year 3
Year 4

Radio Category: Past 7 Days



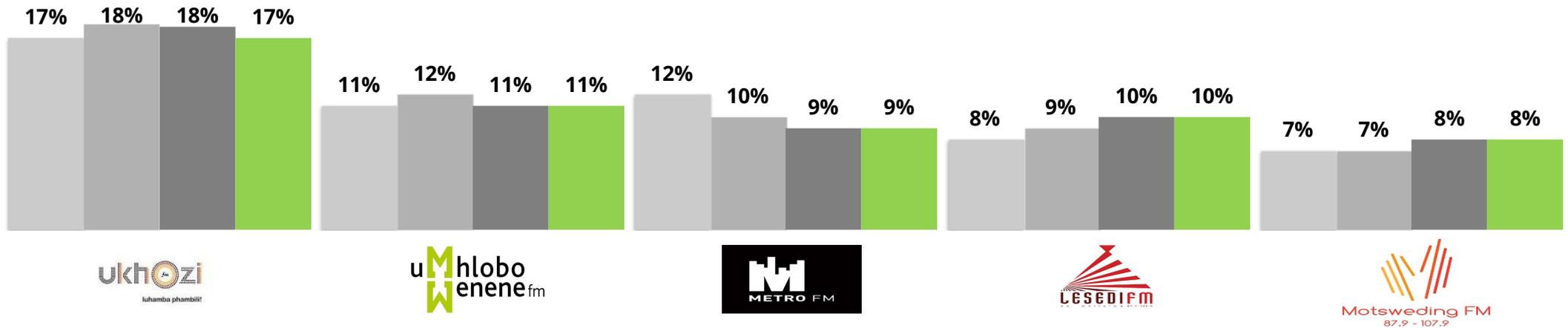
All Radio



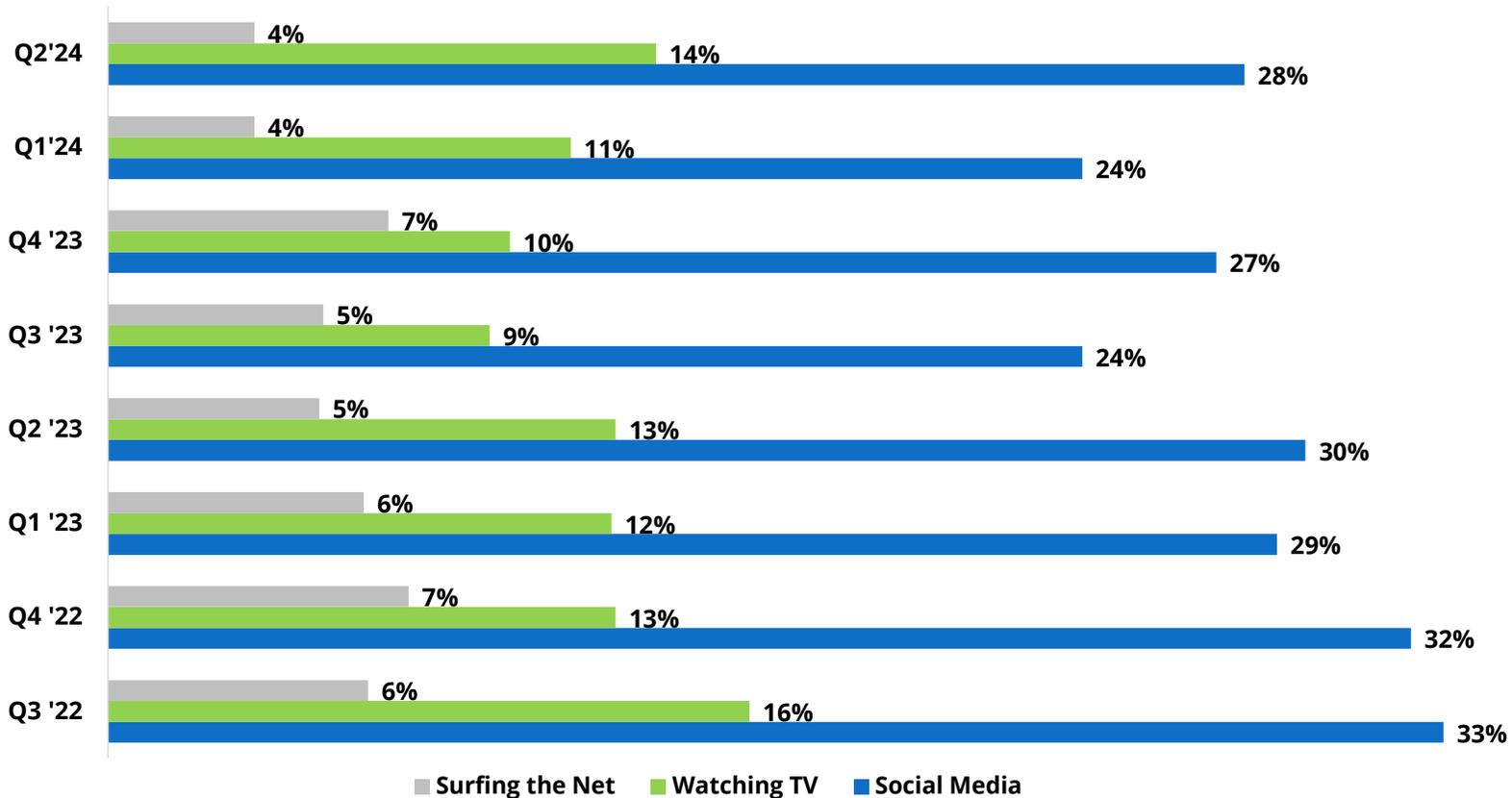
Commercial



Community



While listening to radio, which secondary activity do you engage in?

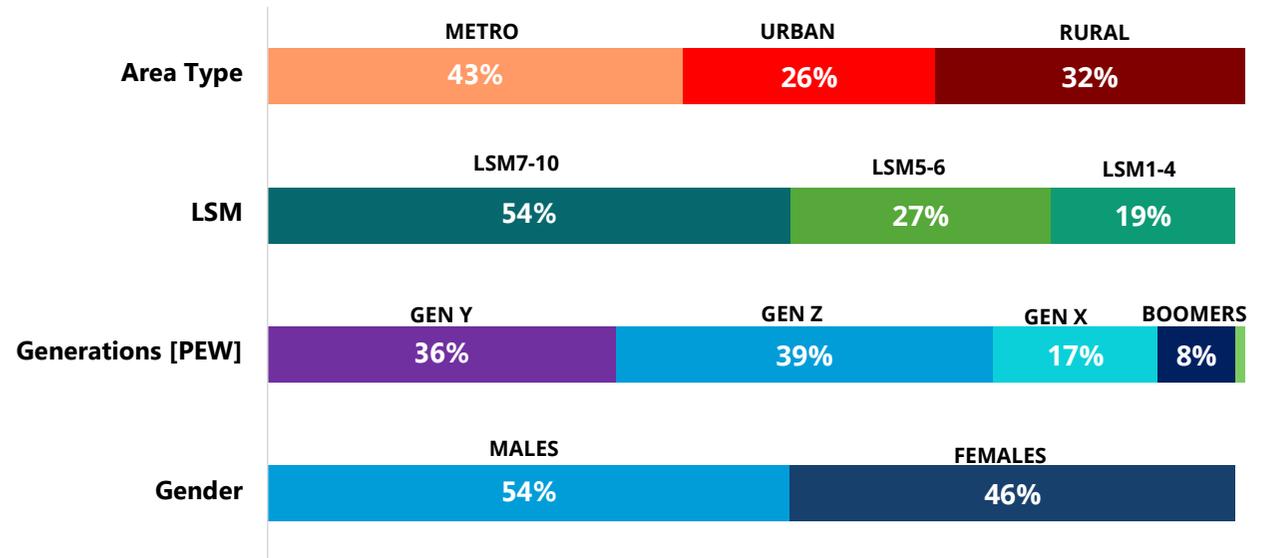


Audio Streaming Landscape

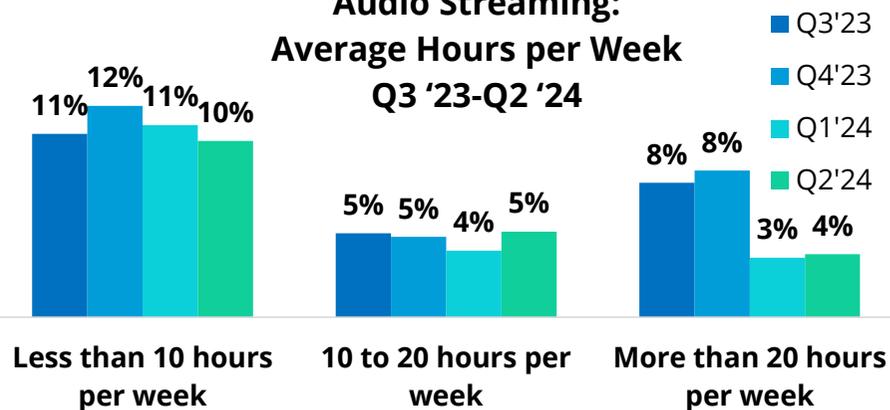
12.5M people have access to audio online streaming services.

47% people stream audio weekly.

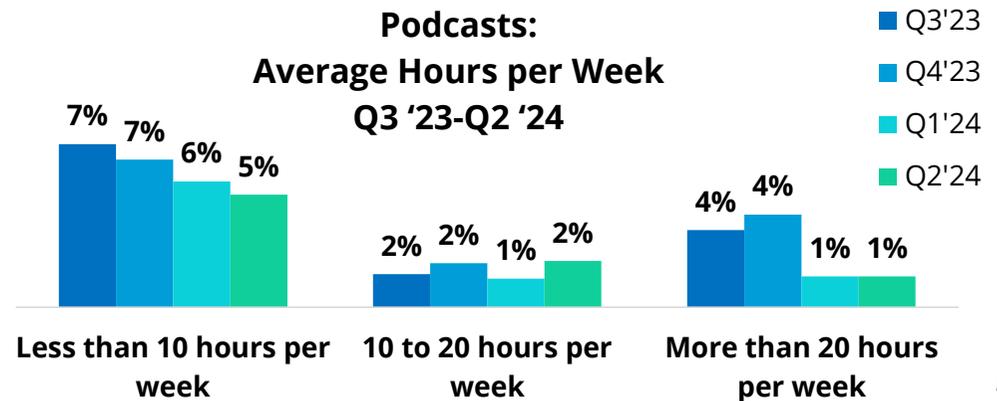
14% people download vod/podcasts weekly.



Audio Streaming: Average Hours per Week Q3 '23-Q2 '24

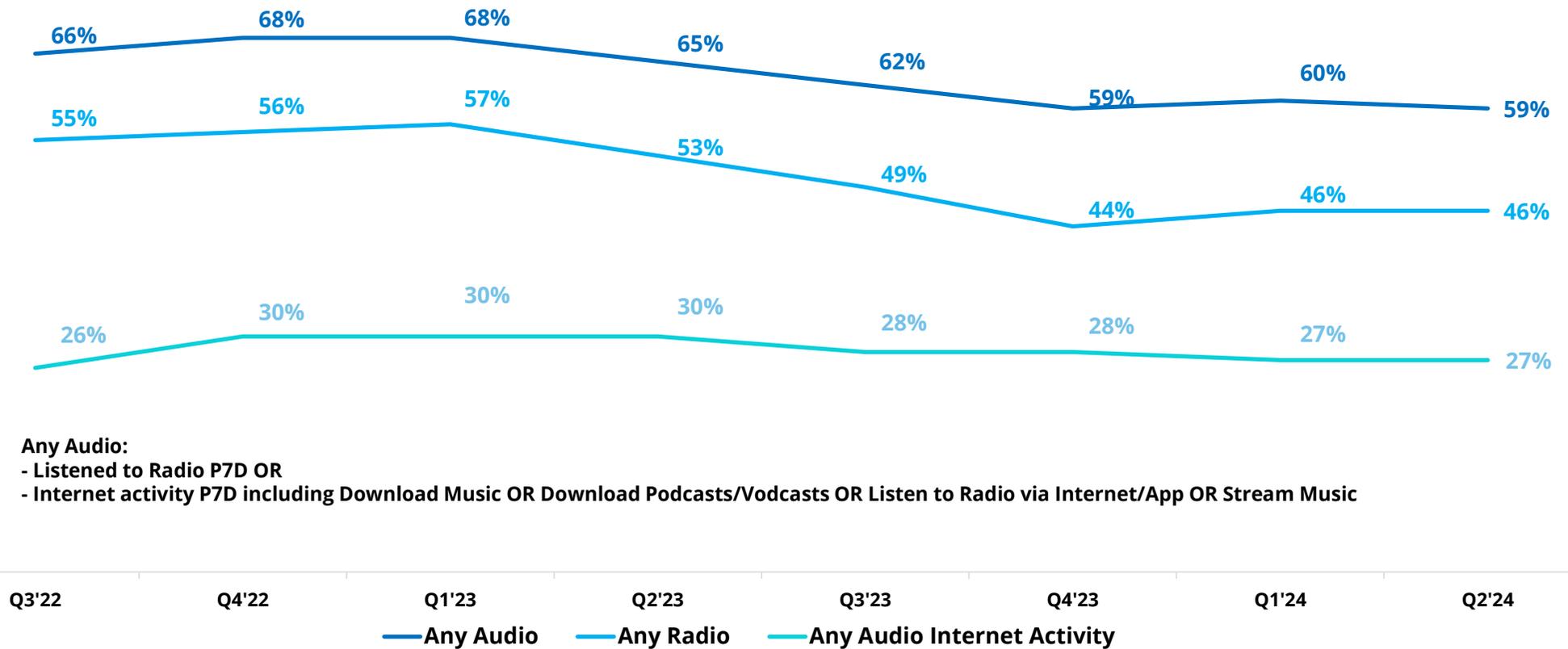


Podcasts: Average Hours per Week Q3 '23-Q2 '24



N = 2 513 805

Any Audio Listening P7D

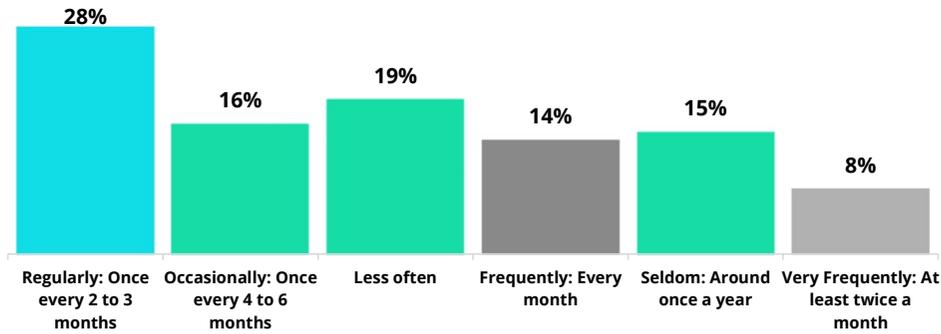


562K people regularly go to the Cinema once every 2 to 3 months.



R430 average cinema outing cost.

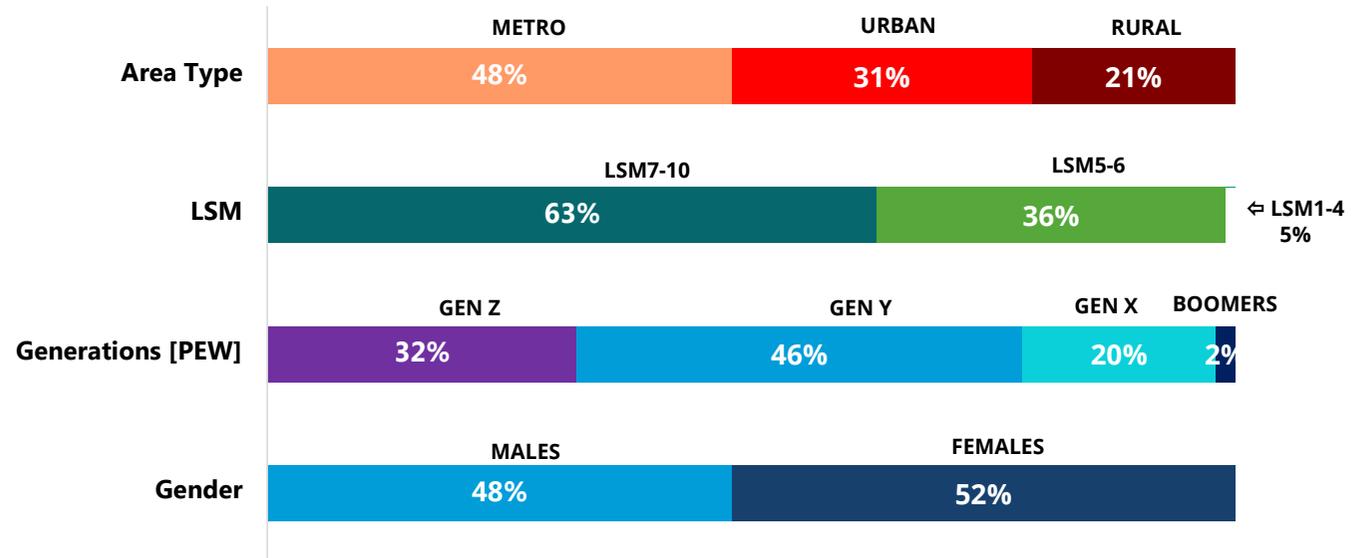
Cinema (P4W) Penetration **2%**



TOP 4 Cinema Chains Visited

	863K Visited most often	↓
	733K Visited most often	↓
	196K Visited most often	↓
	58K Visited most often	↓

Cinema Penetration* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on N = 94 264

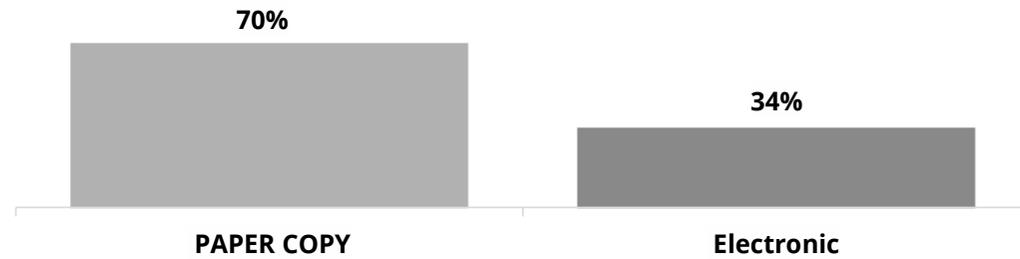


N= 862 525

3.7M people read magazines in the past 3 months.

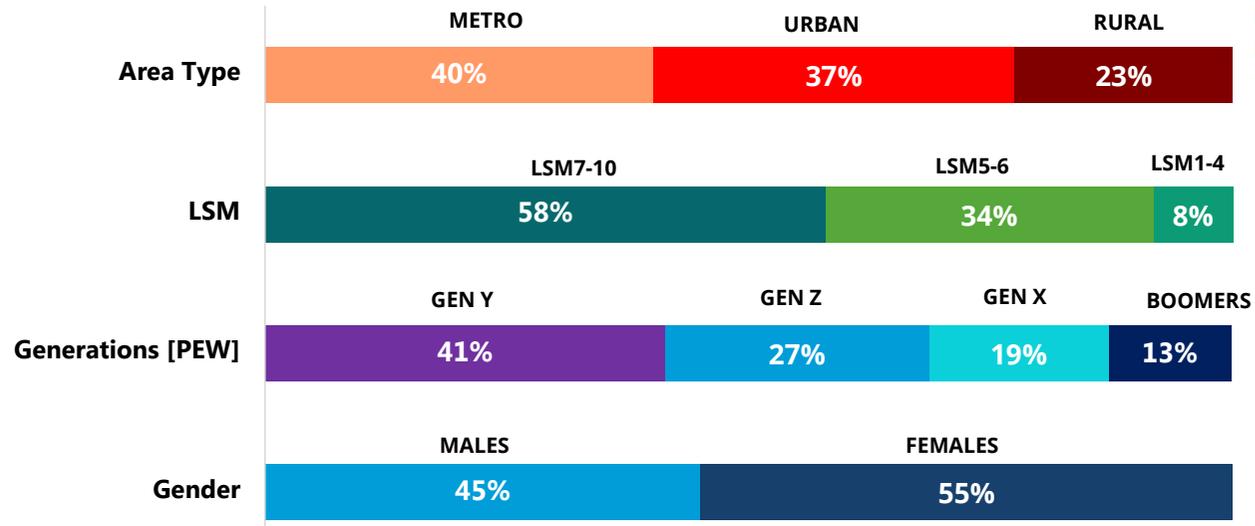
Top 4 Magazines

DRUM	1.3M Read P3M	↓
HUISgenoot	461K Read P3M	↓
YOU	446K Read P3M	↓
Kuier	271K Read P3M	↑



Magazine (P3M) Penetration 9%

Magazine AIR (ANY) Penetration 5%



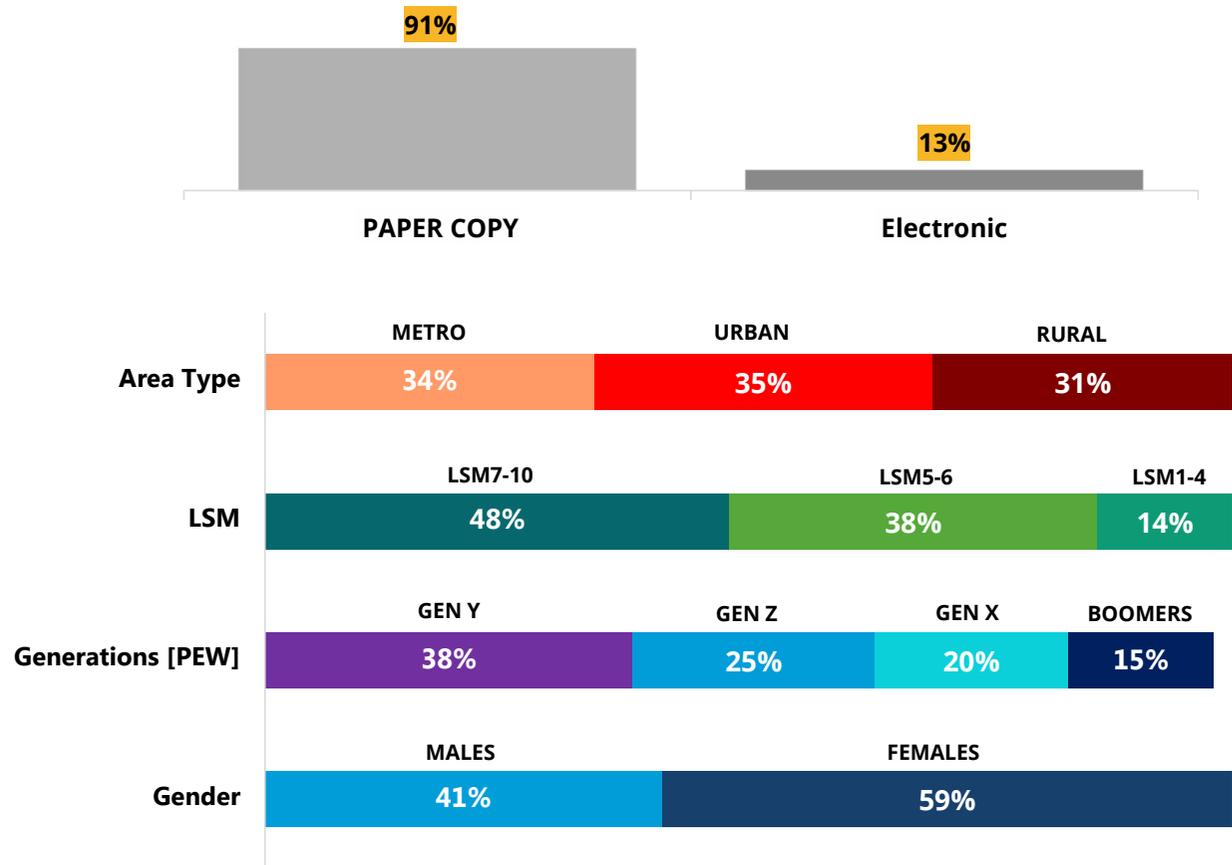
Magazine Penetration* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on N = 3 736 287.

N = 3 736 287

5.2M people read store magazines in the past 3 months.

Top 4 Store Magazines

	1.3m Read P3M
	1.3m Read P3M
	1.2m Read P3M
	0.6m Read P3M



Magazine Penetration* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on N = 3 736 287.

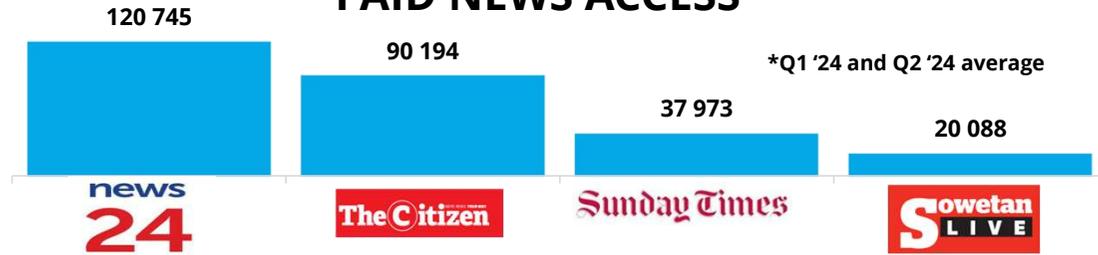
N = 3 736 287

10.7M people read Newspapers in the past 3 months.

Top 4 Daily Newspapers

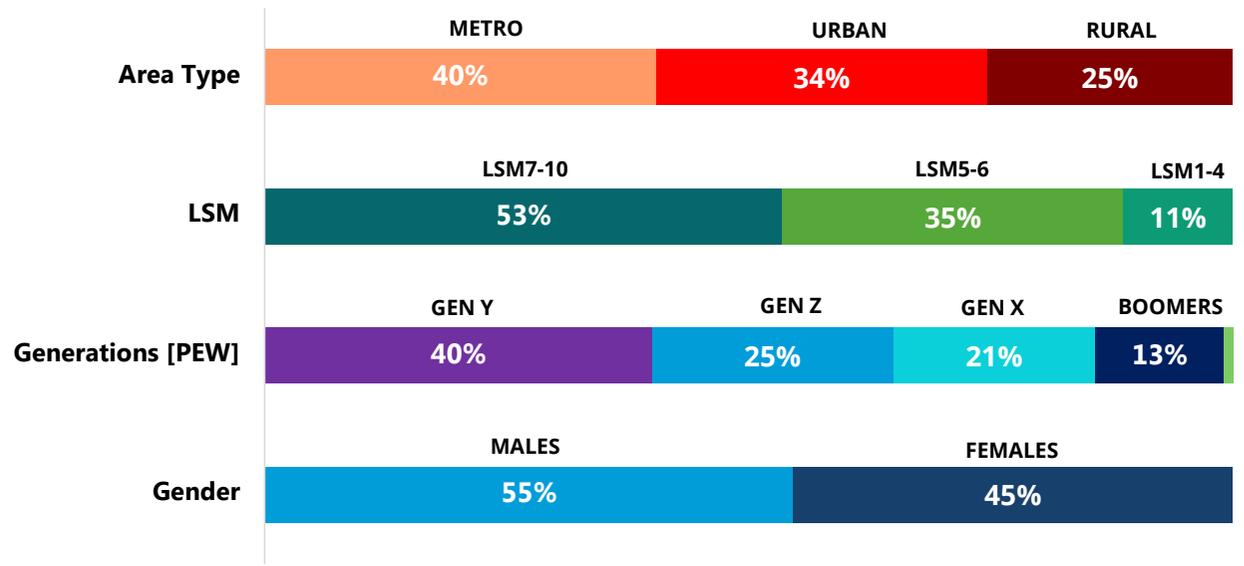


PAID NEWS ACCESS



Newspaper (P3M) Penetration 25%

Newspaper AIR (ANY) Penetration 8%

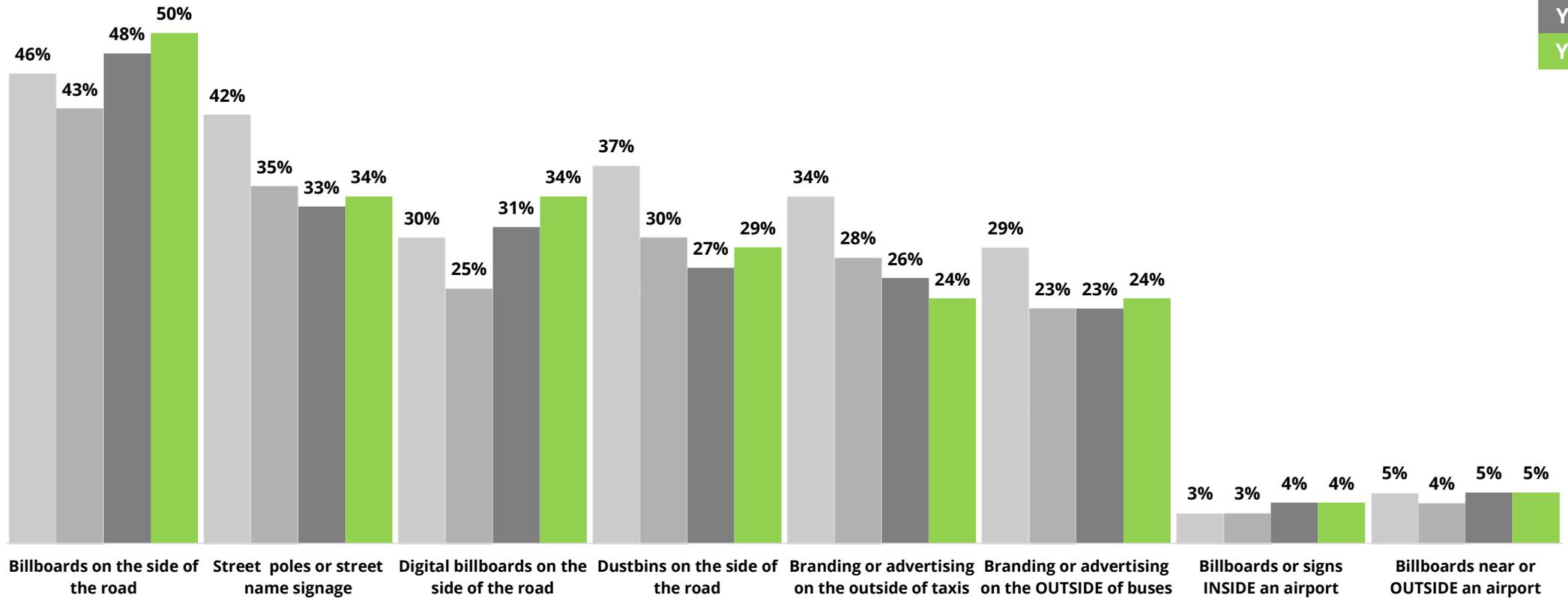


Newspaper Penetration* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on N = 10 692 385.

N = 10 692 385

OUT OF HOME P4W SHIFTS: % POP YOY

Year 1
Year 2
Year 3
Year 4





MARKETING RESEARCH
FOUNDATION

Financial Services



PLUS 94
RESEARCH



72% have a bank account excluding the SASSA accounts



10% have medical aid cover

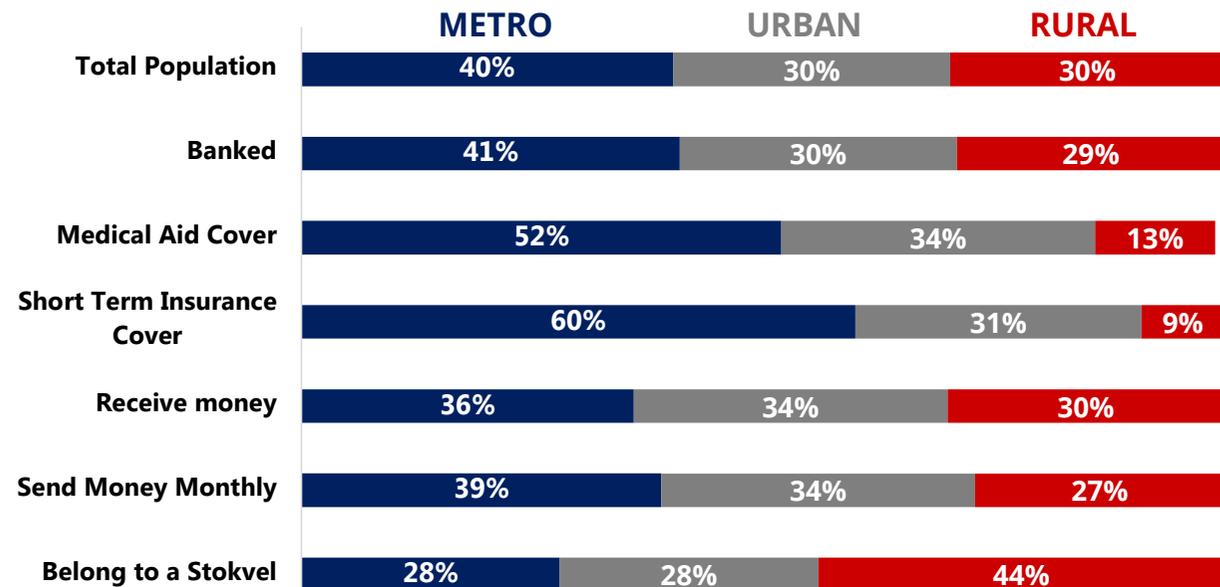


35% are insured

31% have funeral insurance or policy

3% have short term insurance.

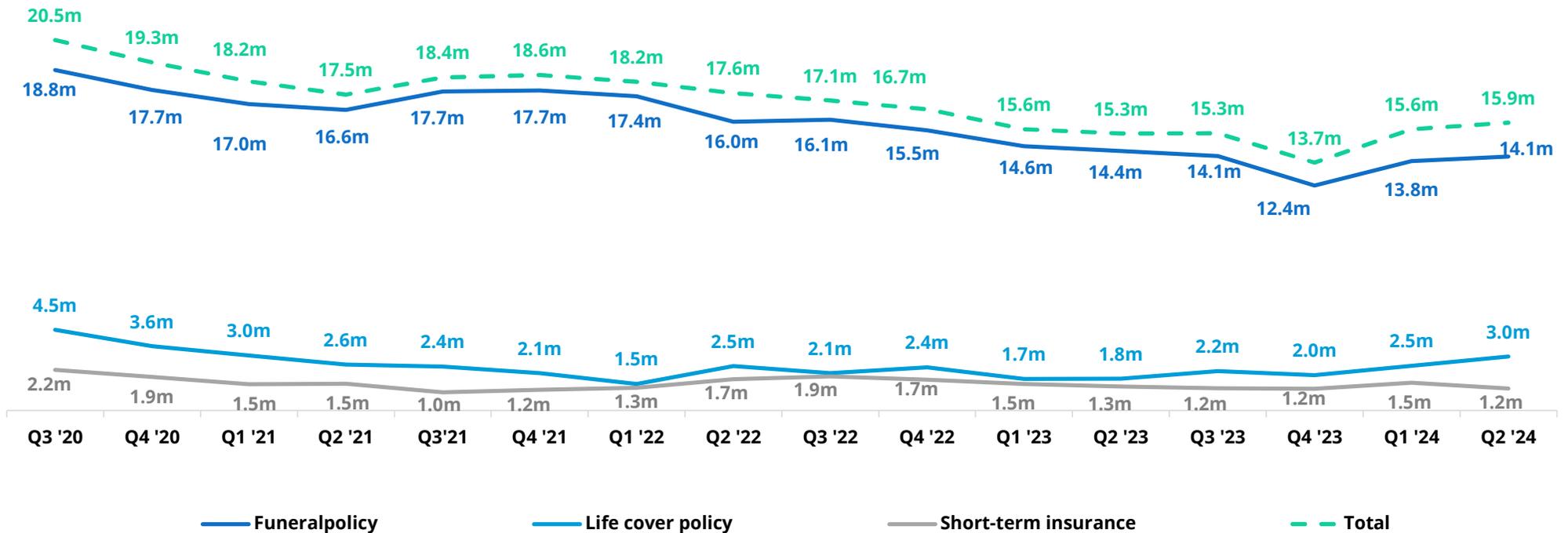
Distribution by Area



22% transfer or send money to family or friends monthly. On average **R1086** is sent.

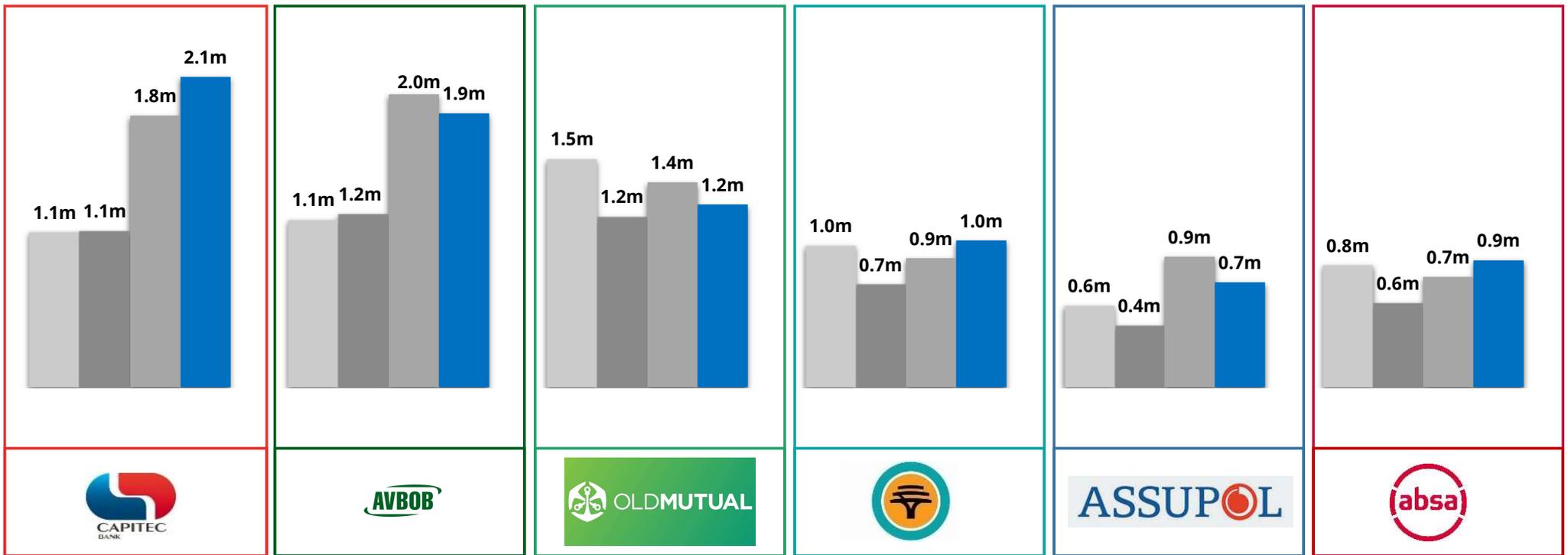
8.4% belong to a stokvel.

INSURANCE PENETRATION TREND LINE: QOQ



TOP TOTAL INSURANCE COMPANIES USED: YOY

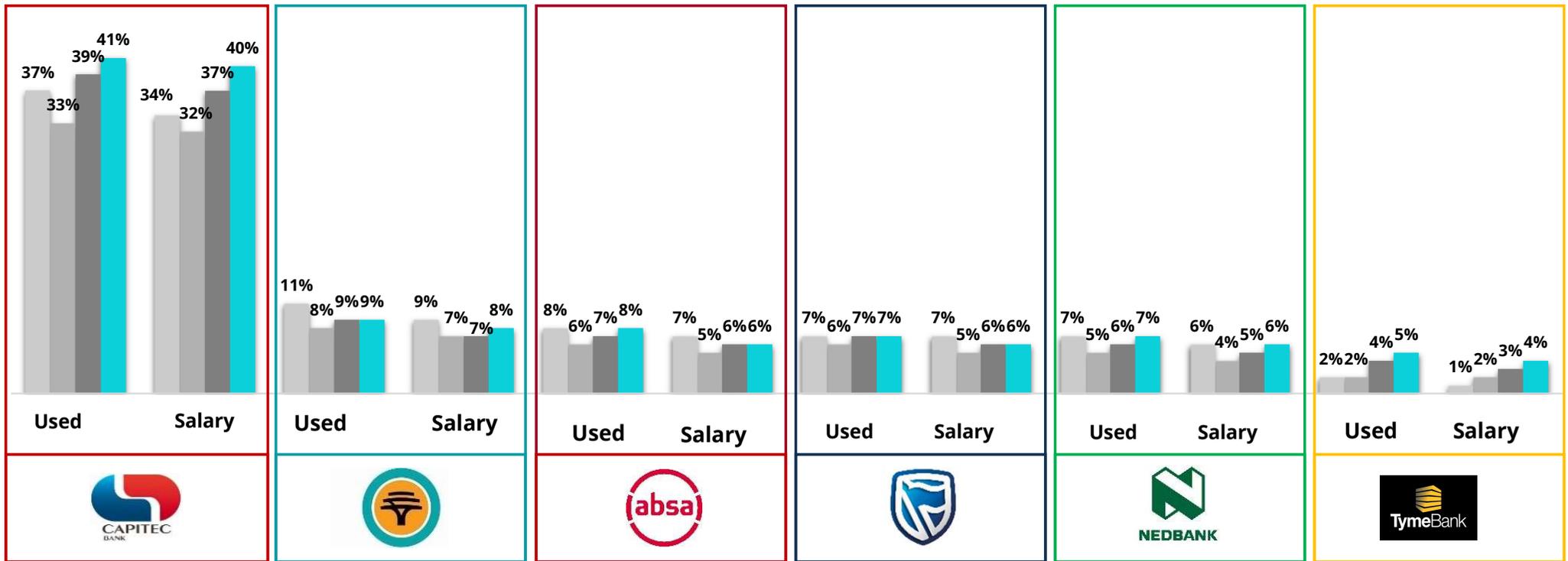
Year 1
Year 2
Year 3
Year 4



Bank Usage and Salary Deposit Accounts

*2024
13% used a
Virtual
Card

Year 1
Year 2
Year 3
Year 4



*2024 Virtual card measures Q1 '24 and Q2'24, data is still growing



MARKETING RESEARCH
FOUNDATION

Retail



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RESEARCH

 **31.2M** people spent **R300 or less** and **7.4M** people spent **more than R300** on cell phones per month (include calls, subscriptions, SMSs, vouchers and data)

Top 4 Networks

*For phones 1 and 2



18.2M use this network



15.1M use this network

Telkom

5.4M use this network



3.6M use this network

SIM Options

*For phones 1 and 2

39.5M cellphone on Prepaid

1.7M cellphone on Contract

1.3M cellphone on Top Up

Buying Preference

*For phones 1 and 2

23.2M Buy both Airtime and Data

17.7M Buy Airtime

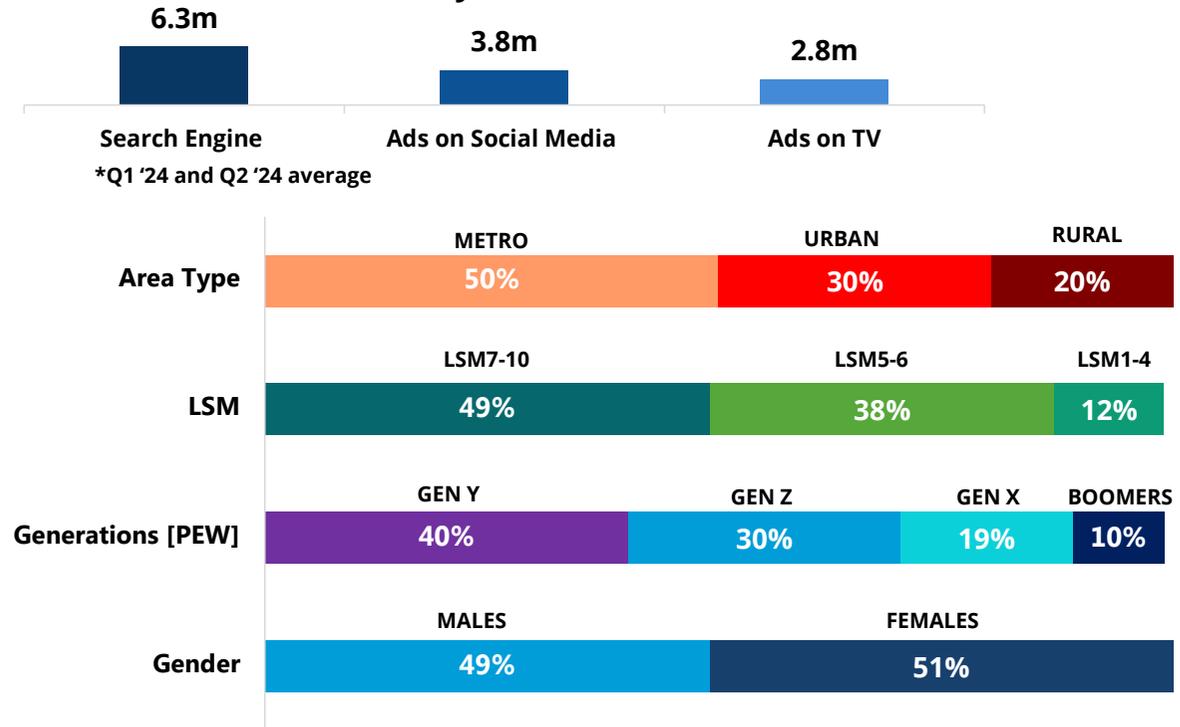
1.7M Buy Data bundles only

Top 3 online shopping categories [P4W]

1. Communications/cellphones/prepaid (minutes/data/SMS) **6.0 million**
2. Clothing **1.5 million**
3. Food/drink **1.6 million**

923K most often use food delivery service when purchasing take-aways.

*How do you discover new brands?



e-Commerce (P4W) Penetration **21%**

*Q1 ' & Q2 24 21% Research Brands before purchasing



P4W
331K ↓

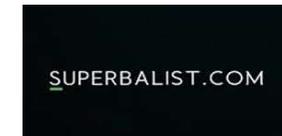


P4W
277K ↑

CLOTHING PURCHASE ONLY*



P3M
443K* ↑



P3M
57K* ↓

Online shopping* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on N = 9 369 661

N=9 369 661



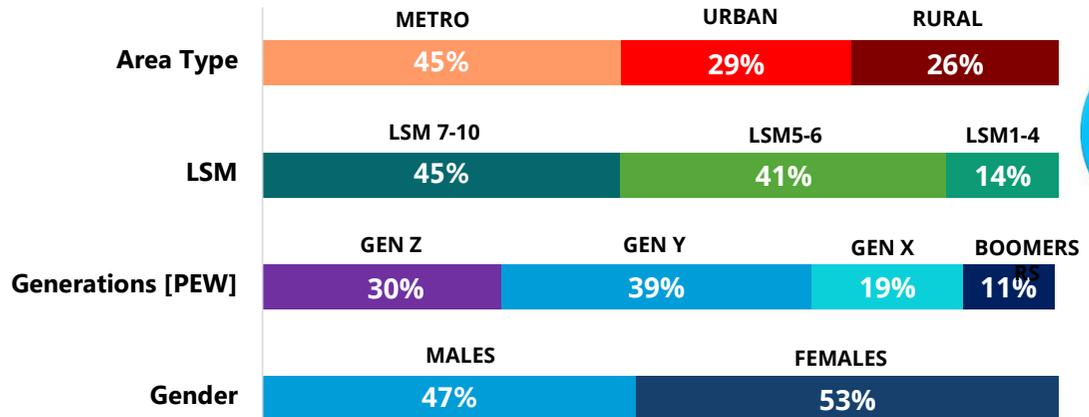
49% bought fast food P4W



R195 average spend on fast food on last restaurant visit.

924K use Fast Food delivery Service

Fast Food Purchases N=21 198 016



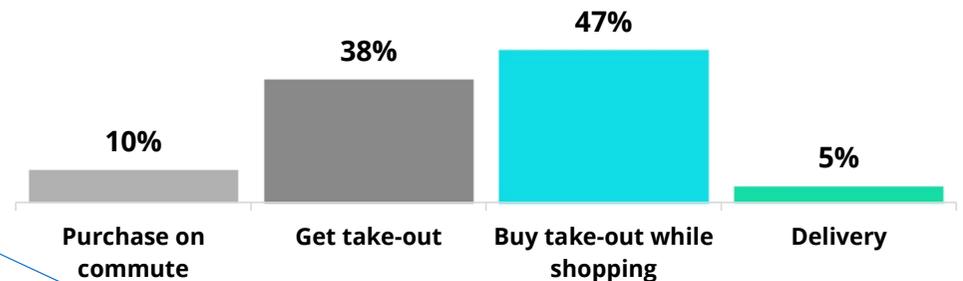
Average party size on last restaurant outing:
3

Most often used method to order food N=25 359 959



Uber Eats **38% (P4W)** order from Uber Eats

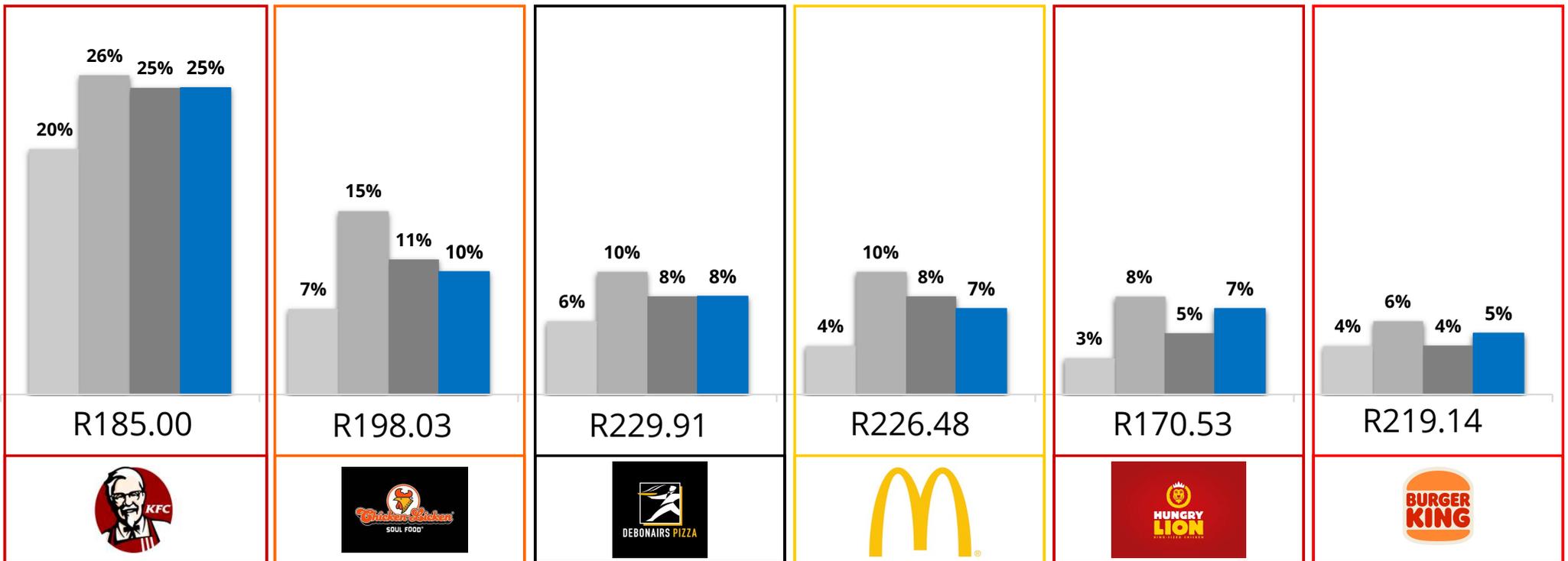
Buying behaviour N= 2 197 101

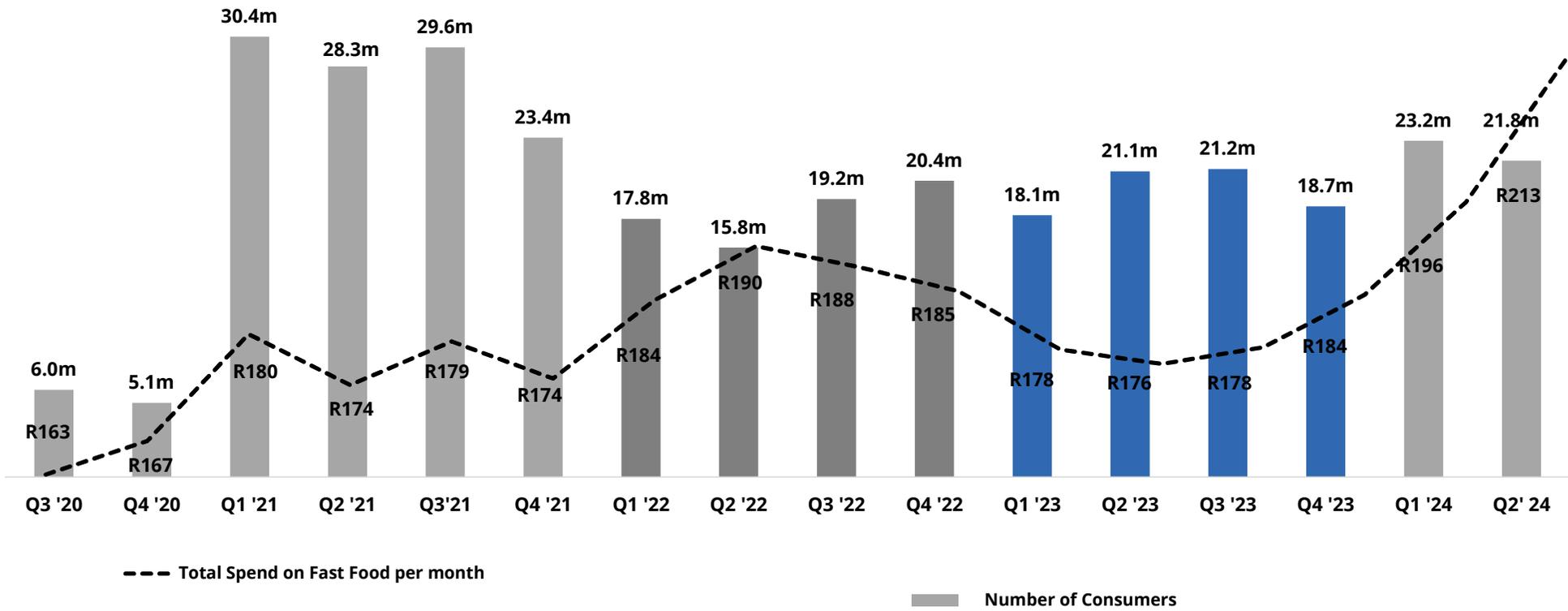


MR D **33% (P4W)** order from Mr. D

TOP 6 FAST FOOD BRANDS AND AVERAGE SPEND: YOY

Year 1
Year 2
Year 3
Year 4





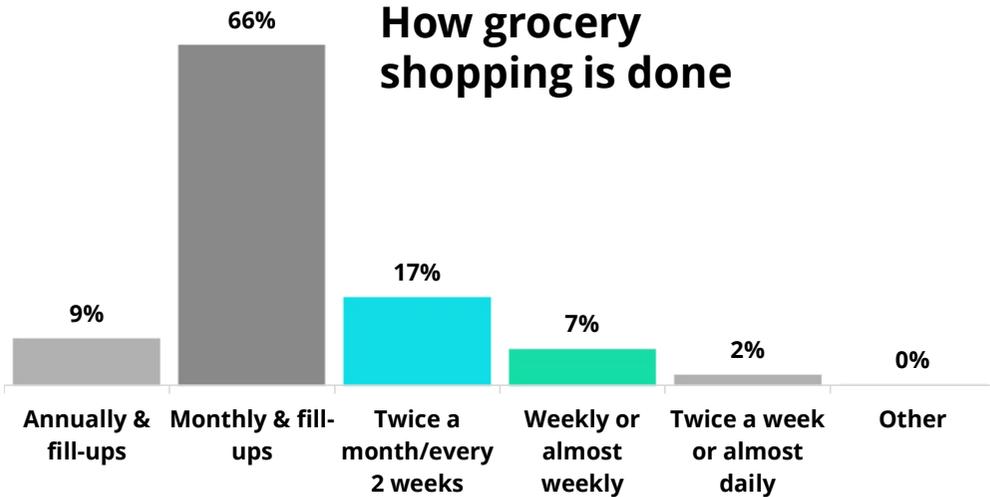


R2 033 average monthly spend on groceries.

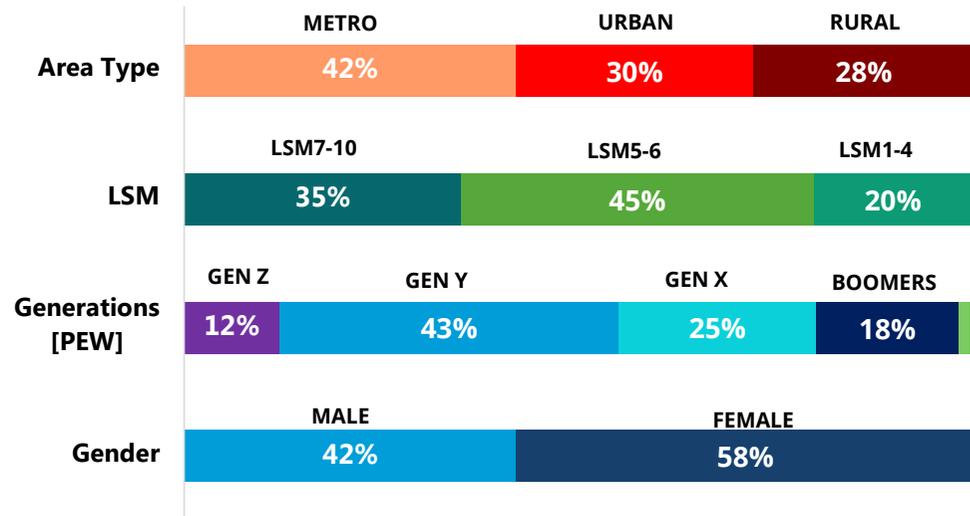


67% of the respondents usually do the grocery shopping themselves in their household.

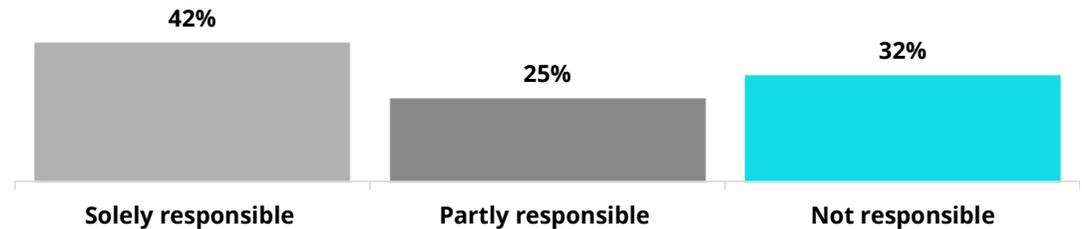
How grocery shopping is done



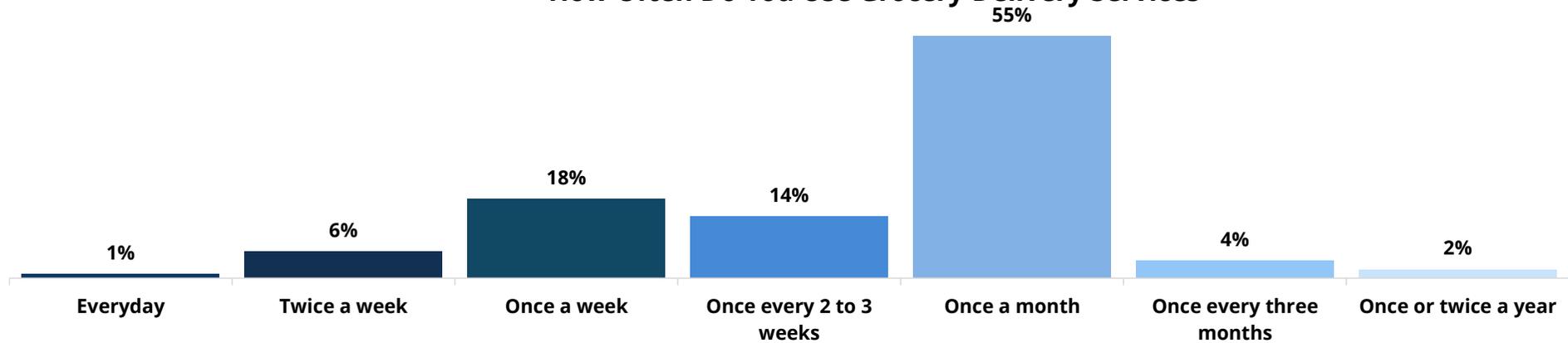
Shopping Responsibility



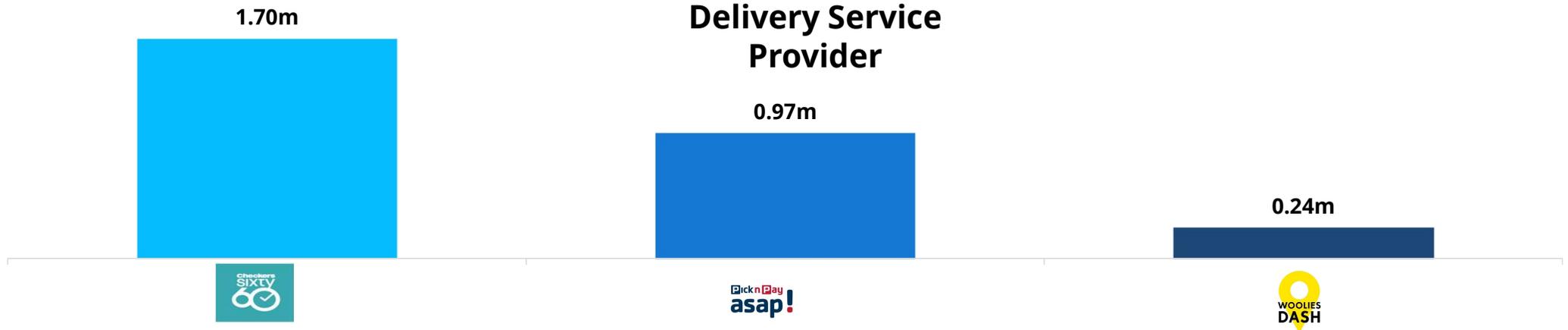
Household purchases responsibilities



How Often Do You Use Grocery Delivery Services



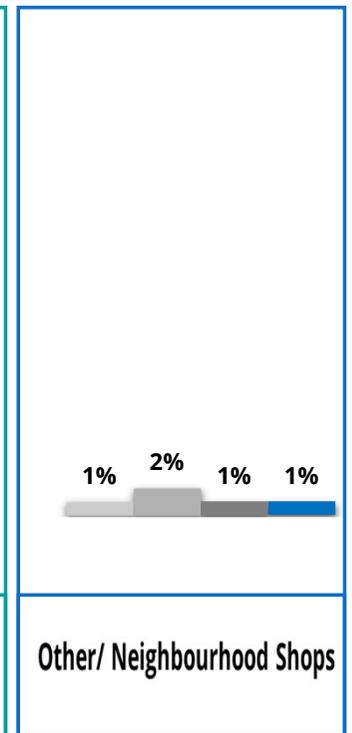
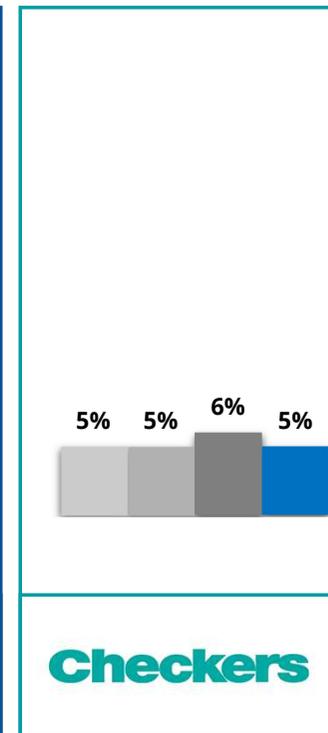
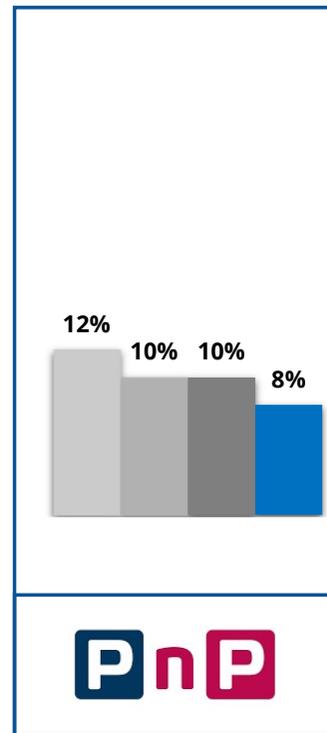
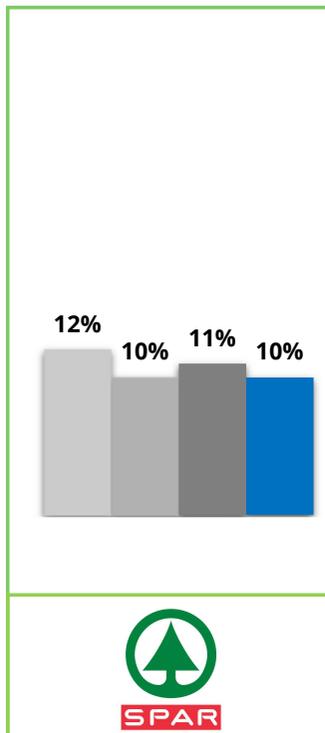
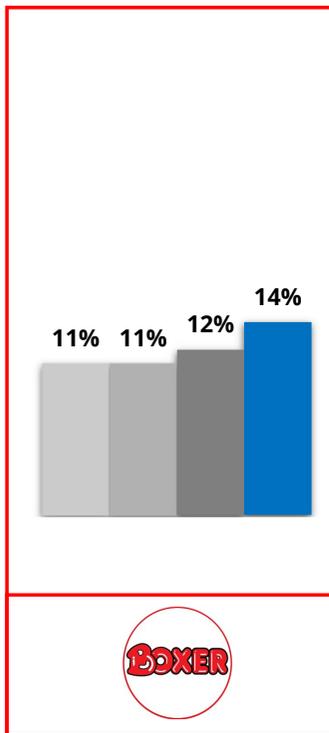
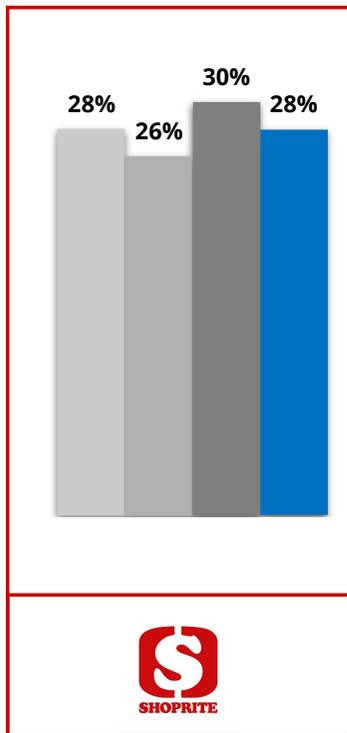
Delivery Service Provider



**The data is an average of Q1 '24 and Q2 '24, the data is still growing.*

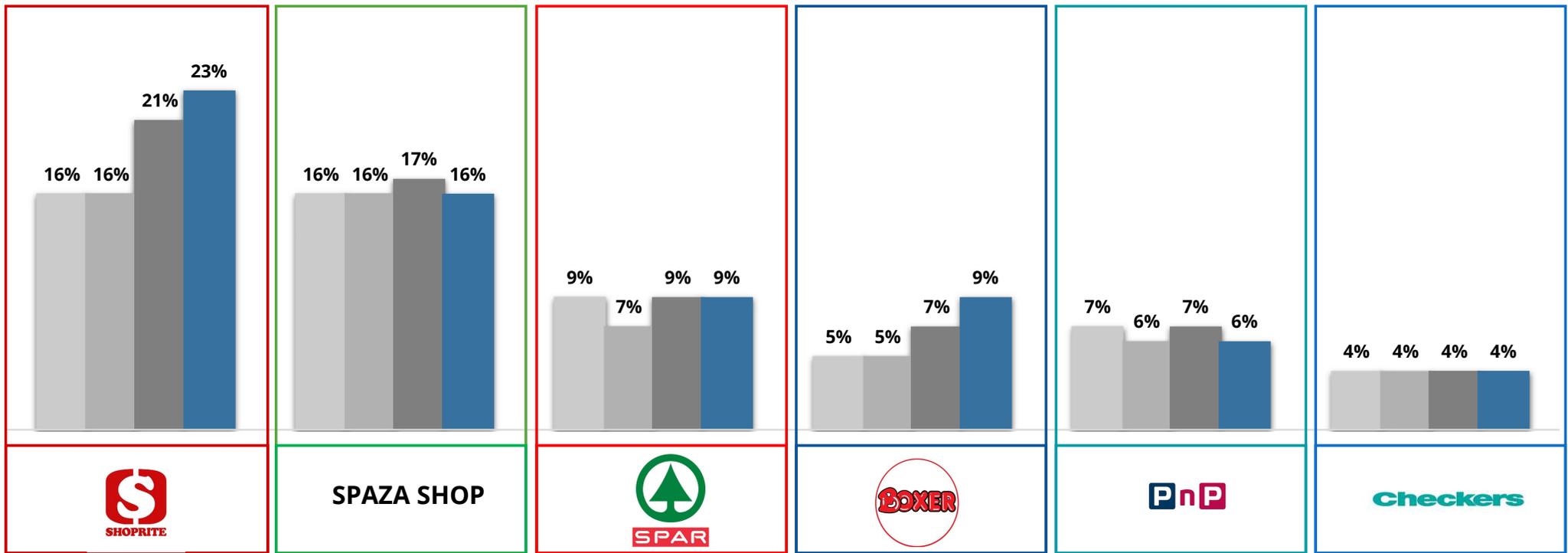
TOP RETAILERS: BULK SHOPPING (IN STORE) YOY

Year 1
Year 2
Year 3
Year 4



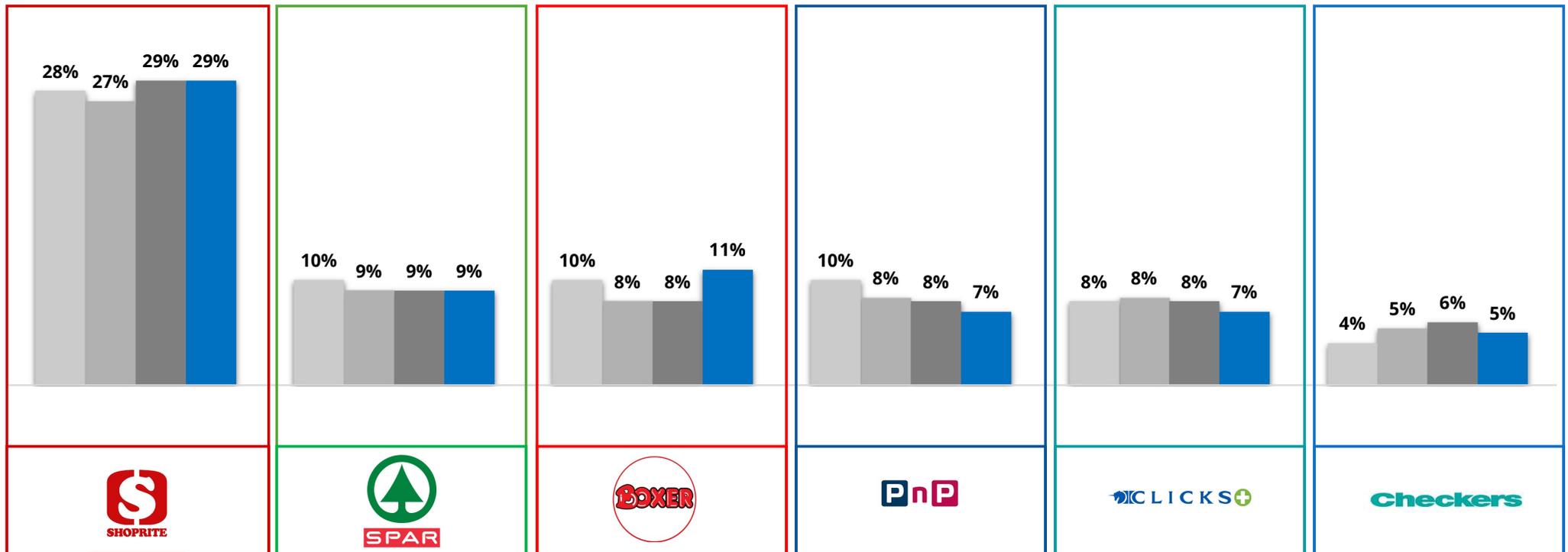
TOP RETAILERS: DAY TO DAY (IN STORE) GROCERIES YOY

- Year 1
- Year 2
- Year 3
- Year 4



TOP RETAILERS: TOILETRIES (IN STORE) YOY

Year 1
Year 2
Year 3
Year 4

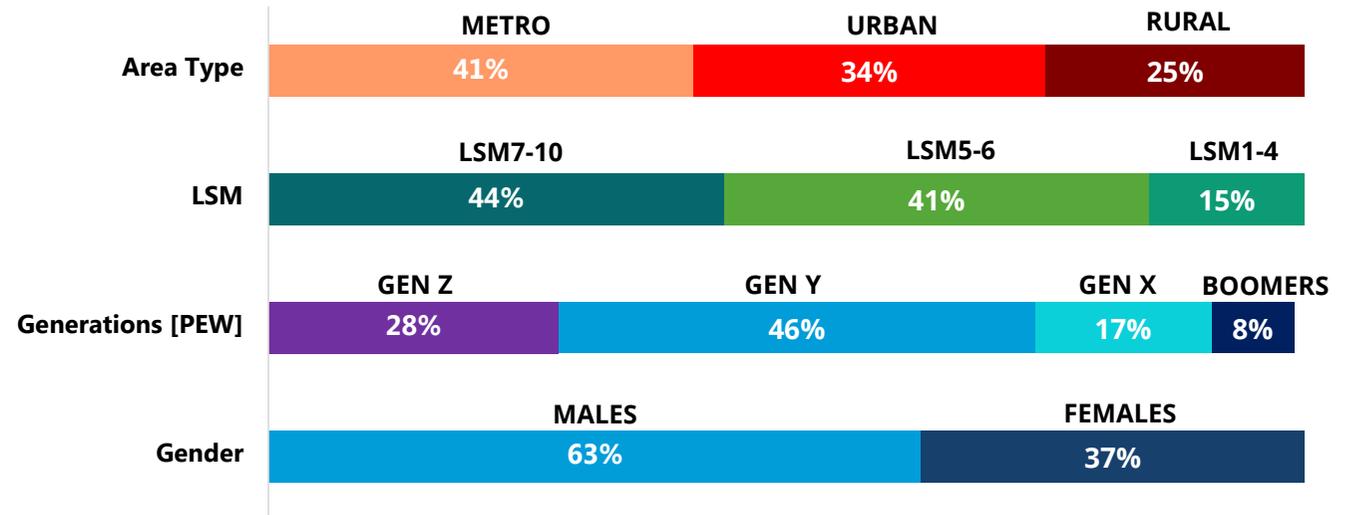


 **R514** average monthly spend on alcoholic beverages

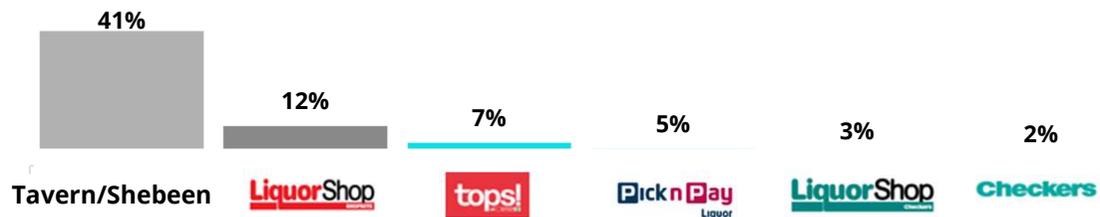
 **23%** bought liquor in P7D

 **13%** bought liquor in P7D from a tavern/shebeen

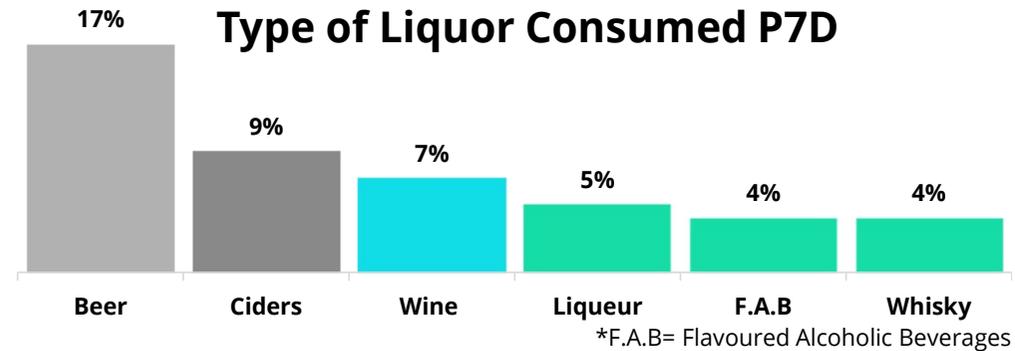
Bought Alcohol P7D Population Distribution



Top Liquor Outlets P7D



Type of Liquor Consumed P7D



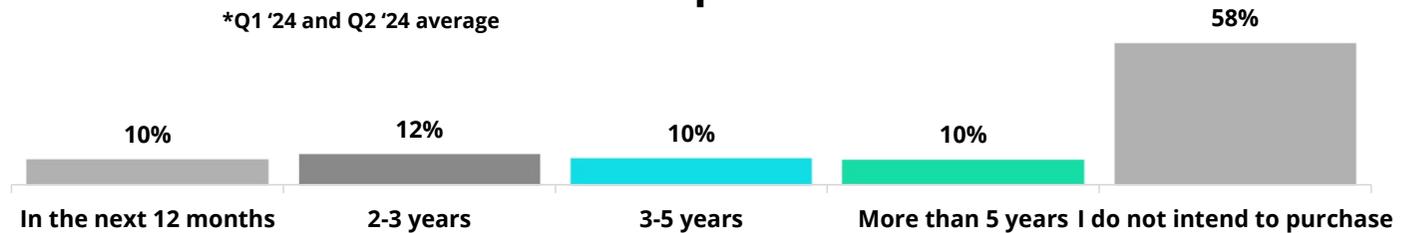
-  **R2068** average monthly spend on fuel
-  **45%** have a tracking device
-  **R5009** average instalment price
-  **62%** people purchased second-hand vehicle

87% of from car owning homes, personally drive a vehicle

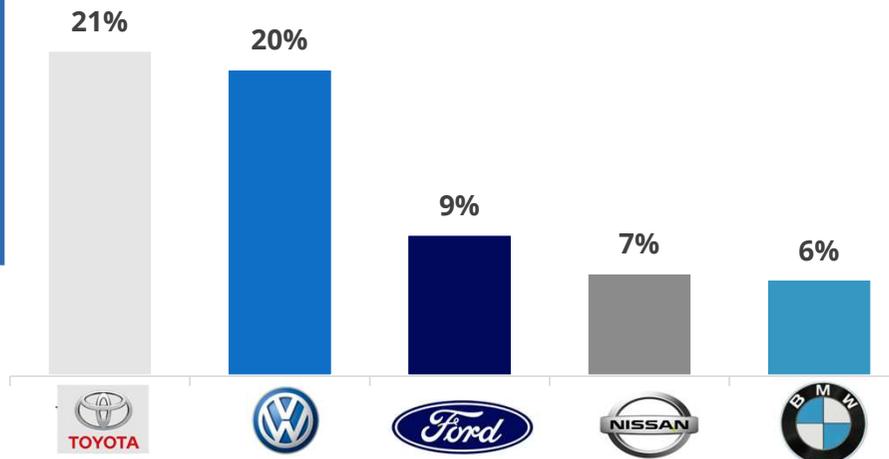
37% of car drivers personally own a vehicle

Intended next vehicle purchase

*Q1 '24 and Q2 '24 average

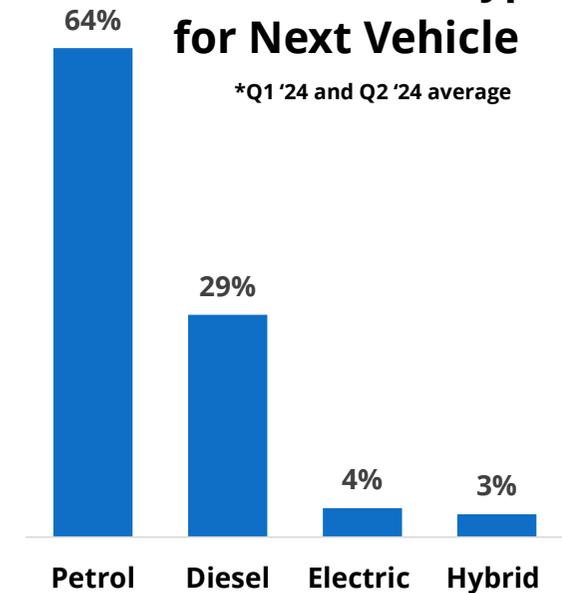


Most Common Vehicle Brands Driven

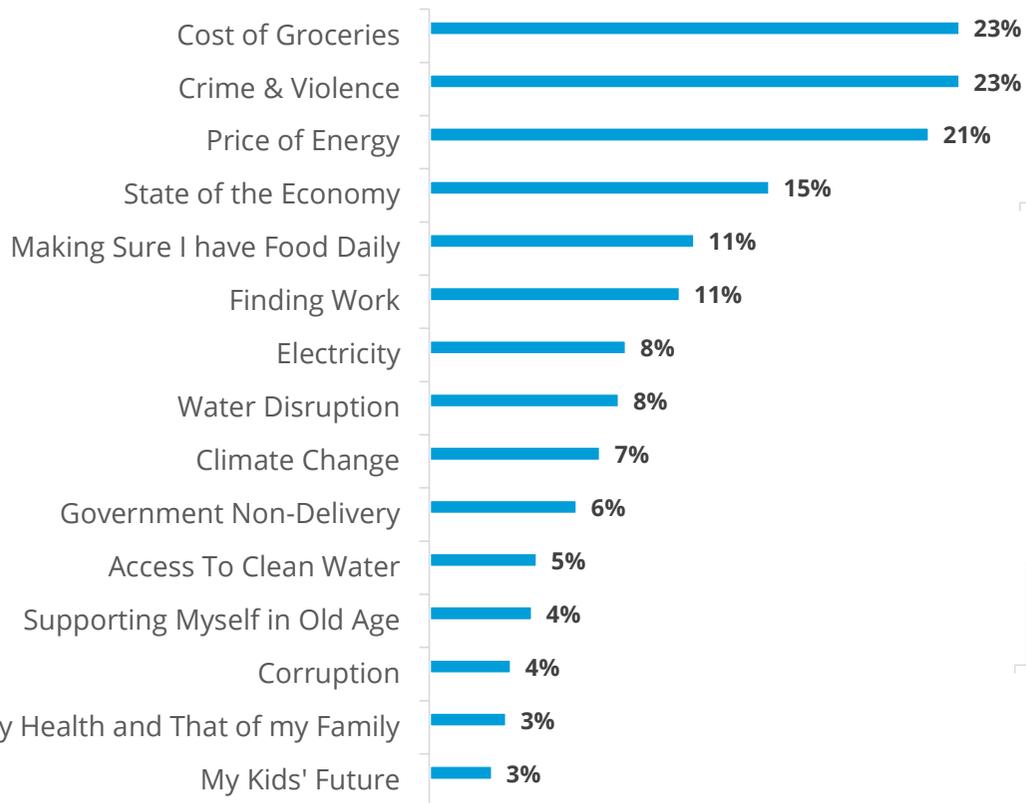


Preferred Fuel Type for Next Vehicle

*Q1 '24 and Q2 '24 average

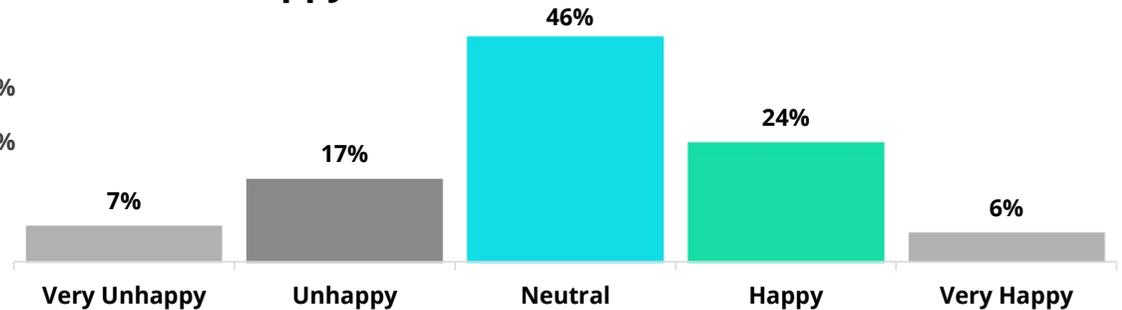


Current Worries

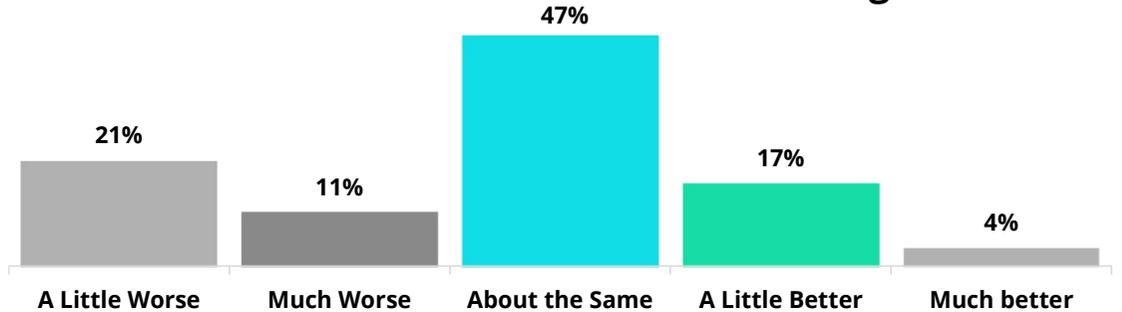


*Q1 '24 and Q2 '24 average, the data is still growing.

How Happy with Life and Current Circumstances



Personal Finances vs A Year Ago





For further information regarding
subscribing to MAPS, please mail us at

mrf@mrfesa.co.za

[Marketing Research Foundation
\(mrfesa.org.za\)](http://mrfesa.org.za)

nubiz@plus94.co.za

[Plus94 Research](http://plus94.co.za)

<https://www.plus94.co.za/>

Rands: A coin and monetary unit of the Republic of South Africa, equal to 100 cents

LSM: Living Standards Measure (LSM) marketing tool used in South Africa. It is a means of segmenting the South African market that cuts across race, gender, age, or any other variable used to categorise people. Instead, it groups people according to their living standards.

Shebeens: Informal alcohol outlets commonly known as shebeens operate in South Africa's townships. The first shebeens in South Africa were local bars and taverns where mostly working-class urban males could unwind, socialise, and escape the oppression of life during the apartheid era. The shebeens were also illegal. Today, they form a vibrant part of the community, and continue to define the social life of many South Africans.

Taverns: A place of business where alcoholic beverages are sold to be consumed on the premises. Like a pub or bar.

Stokvel: The term stokvel is unique to the South African context. Stokvels are essentially voluntary associations in which members make regular contributions to a pool of funds, to be used as capital for investments, collective activities like parties, and even emergency instances where unexpected costs arise. This could be on a weekly, fortnightly, or monthly basis.

Loadshedding: A controlled process that responds to unplanned events in order to protect the electricity power system from a total blackout. While Eskom generally use the word blackout loosely to mean “no lights” in our local area, a country-wide blackout has much more serious consequences. Blackouts occur when there is too much electricity demand and too little supply, bringing the power system into an imbalance and consequently tripping the power system in its entirety.

Provinces: South Africa has nine provinces, which vary considerably in size. The smallest is tiny and crowded Gauteng, a highly urbanised region, and the largest the vast, arid, and empty Northern Cape, which takes up almost a third of South Africa's total land area. Each province has its own Legislature, Premier and Executive Council. The country has common boundaries with Namibia, Botswana and Zimbabwe, while Mozambique and Eswatini lie to the north-east.

EA: The country has been divided into areas called enumeration areas (EA). It is important to know and identify the boundaries of these areas as well as the number of dwellings per enumeration area before the enumerators are sent to the area.



MARKETING RESEARCH
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Thank you.



PLUS 94
RESEARCH

DATA COLLECTION INSTRUMENTS

- Face-to-face questionnaires consisting of 286 questions and covering 1263 non-fast moving consumer goods brands,
- Leave-behind diaries
 - Total Questions = 414
 - Behaviour questions = 112
 - Non FMCG Brands = 219
 - FMCG Questions = 302
 - FMCG Categories = 151
 - FMCG Brands = 1 868



ANNUAL RESEARCH SAMPLE

- Total Annual **20 004**
- Cycle (Quarterly) **5 001**
- Dip (Monthly) **1 667**

INTERVIEW DETAILS

- Face-to-face Interview duration: 45-60 min
- Diary Completion time: 3 and 5 days allocated before collection

RESEARCH UNIVERSE

- Ages 15+
- Male & Female
- All races
- All provinces



Back Checking

RECORDING

- All interviews are recorded
- 25% per interviewer
- Confirm demographic variables
- Confirm Kish Grid compliance
- Report produced per DIP
- Cheated interviews Flagged
- Flagged interviews Telephonic

TELEPHONIC

- 25% of sample
- 25% of interviewer
- Confirm demographic variables
- Confirm Kish Grid compliance
- 3 calls are made per respondent
- Daily targets to Call centre agents and reviewed Monthly
- All calls recorded and quality checked

PHYSICAL

- 2% of sample
- 2% per interviewer
- Confirm demographic variables
- Confirm Kish Grid compliance
- Ops Execs conduct back checks on Physical Back Checks
- Assessed on a weekly basis

GIS Auditing

The research method used in MAPS requires that surveys be completed at unique sampled points using GPS co-ordinates.

Interviewers in field are issued with co-ordinates that lead them to the sampled households.

The TAPI system currently in use auto captures GPS co-ordinates when interviewers are completing surveys.

The revised approach to GPS location capturing involves capturing location at the commencement of survey, at 50% completion and at closing of survey.

Assessment of the GIS data is done at two levels:



LEVEL 01

Consistency assessment of the three captured GPS points.

LEVEL 02

Deviance assessment of the sampled point and first captured GPS point with a tolerance deviation of 25 meters.



If a survey fails a GIS audit, such survey is removed from the data set.