



MARKETING RESEARCH
FOUNDATION

MAPS WEBINAR: Jan '21 – Dec '24

PLUS 94
RESEARCH

MAY 2025

204

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



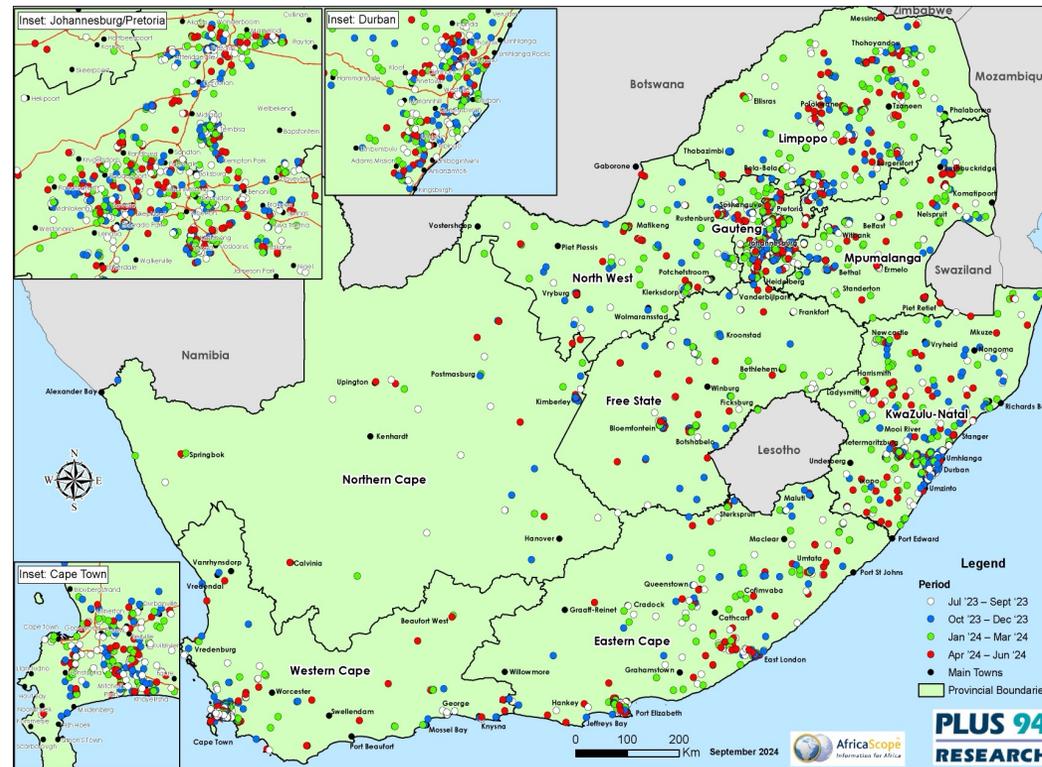
50%
METRO



30%
URBAN



20%
RURAL



Categories

Demographics | Segmentation | Equipment and devices in HH | Internet interaction | Clothing | Shoes | Apparel spend | Cellphones | Vehicles | Financial | Personal expenditure | Purchasing behaviour | Fast Food – behaviour, consumption and outlets | Media | Leisure | Activities | Interests | Psychographics | Shopping – Purchasing behaviour/ Grocery stores/Liquor outlets/buying habits/volumetrics and spend/Clothing purchasing and stores/instore/online/spend | 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

Media Interaction

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

Radio - Radio stations listened to – P7D | 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 | 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 |

Streaming – Netflix | YouTube | Showmax | etc

Social Media – facebook | WhatsApp | Twitter | TikTok | 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

Face-to-Face Questionnaire

Covers over 5000 brands within the 800+ questions

Leave Behind Questionnaire

Covers Behaviour and Brands within the 480 questions

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*

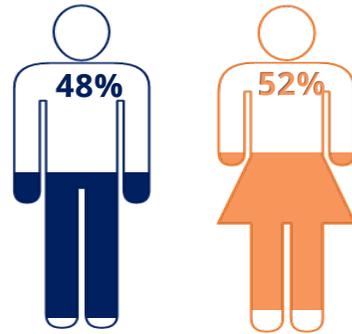
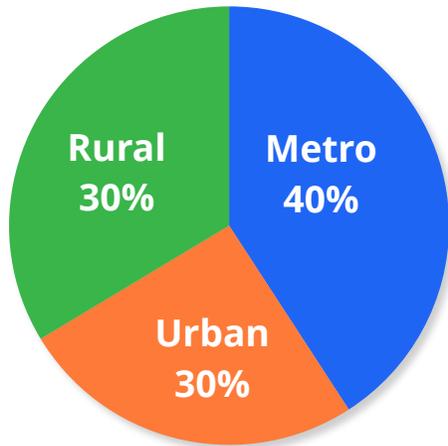
Demographics



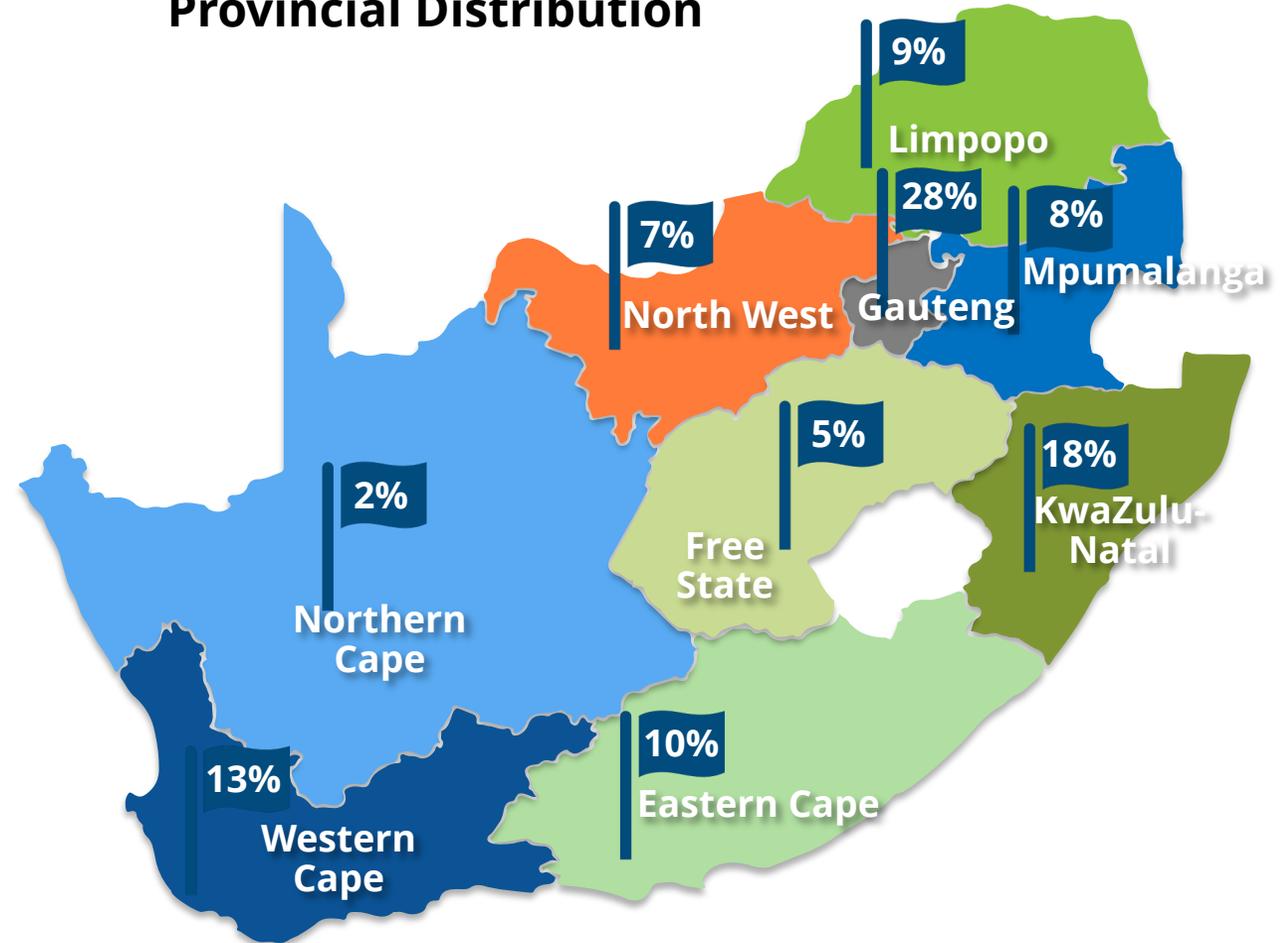
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Area Distribution



Provincial Distribution



Households



People per household

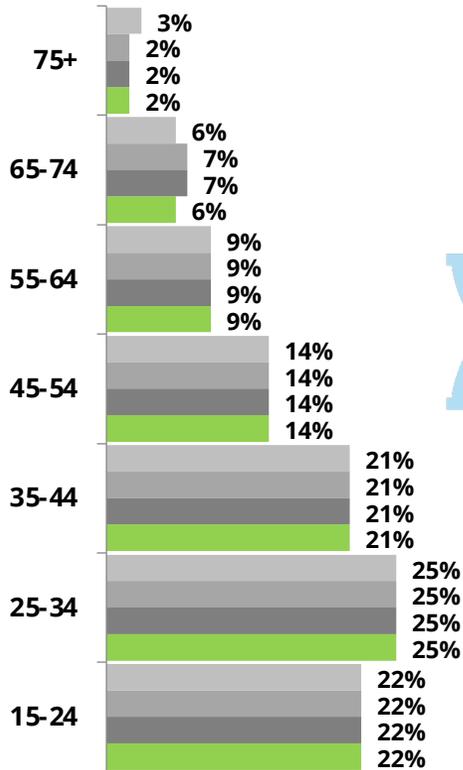


Dependants per household

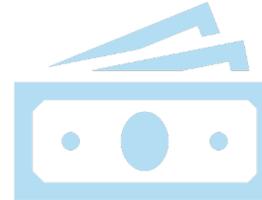
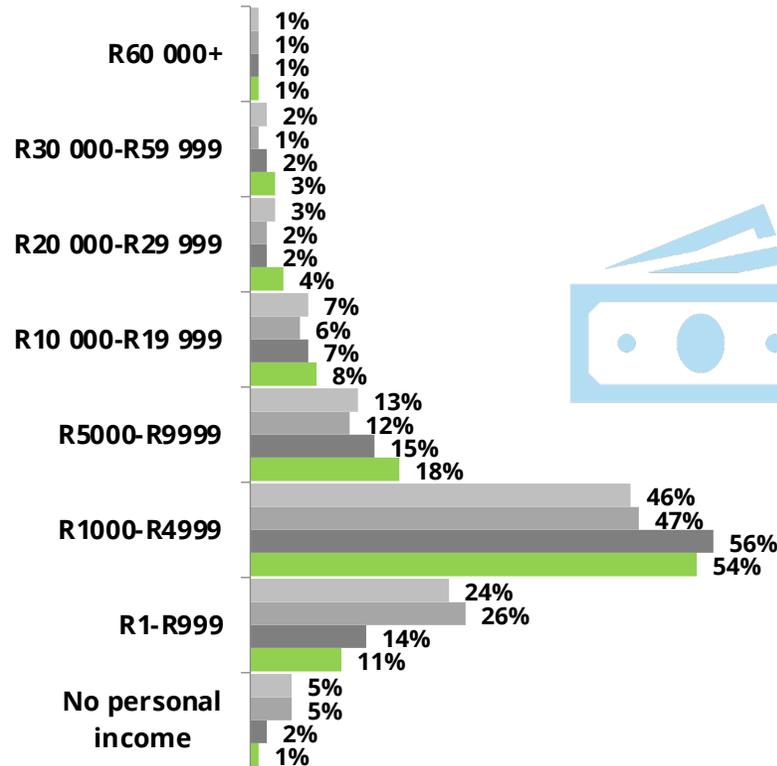


DEMOGRAPHICS: YoY SHIFTS

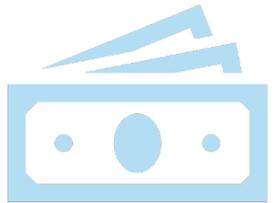
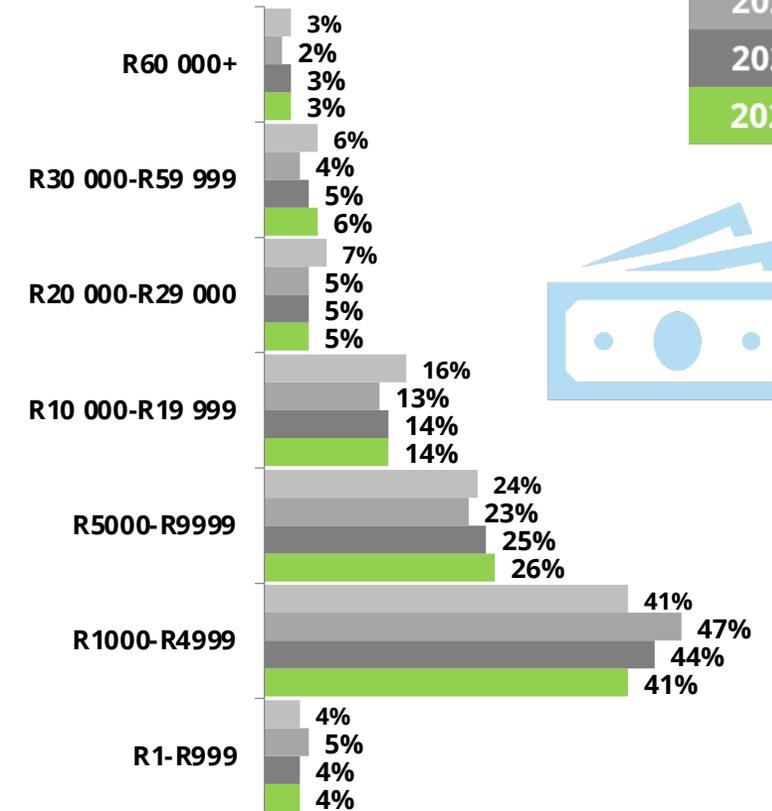
Age Groups



Personal Income



Household Income



2021
2022
2023
2024

Average age: 38
Average age: 38
Average age: 38
Average age: 38

Average Income: R 5 103
Average Income: R4 671
Average Income: R 5 822
Average Income: R6 774

Average Income: R 12 044
Average Income: R10 349
Average Income: R11 454
Average Income: R 12 100

POPULATION: % YoY

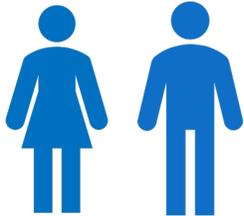
2021
2022
2023
2024

Gender

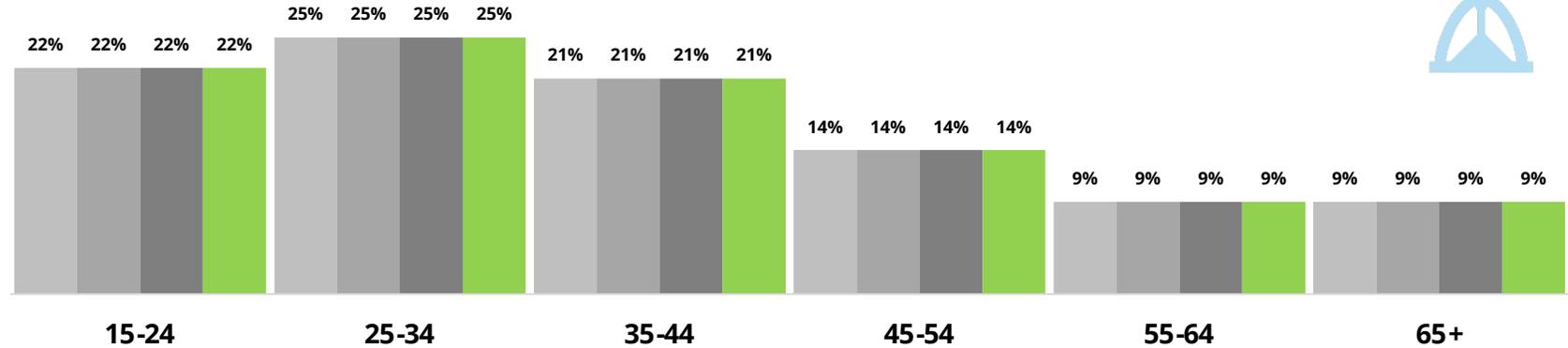


2021 - 2024

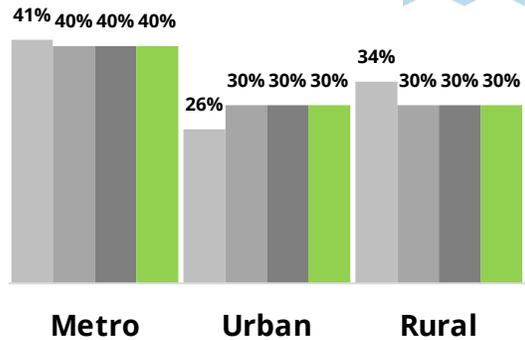
52% 48%



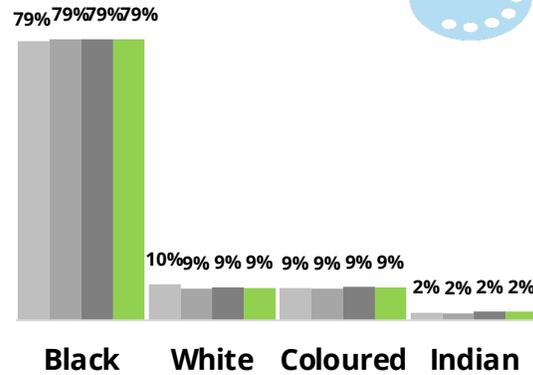
Age Groups



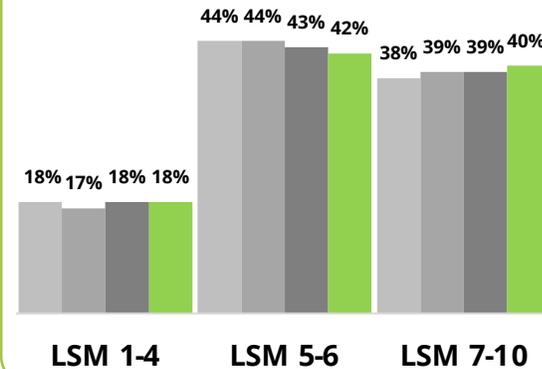
Area



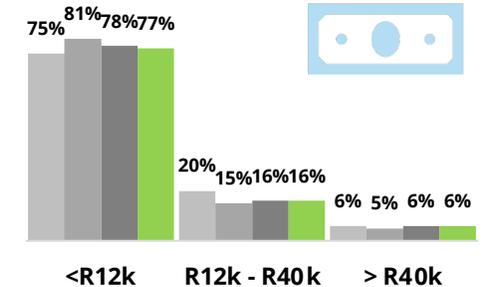
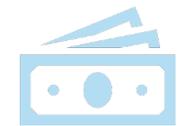
Race



LSM



Monthly Household Income



Economic Landscape

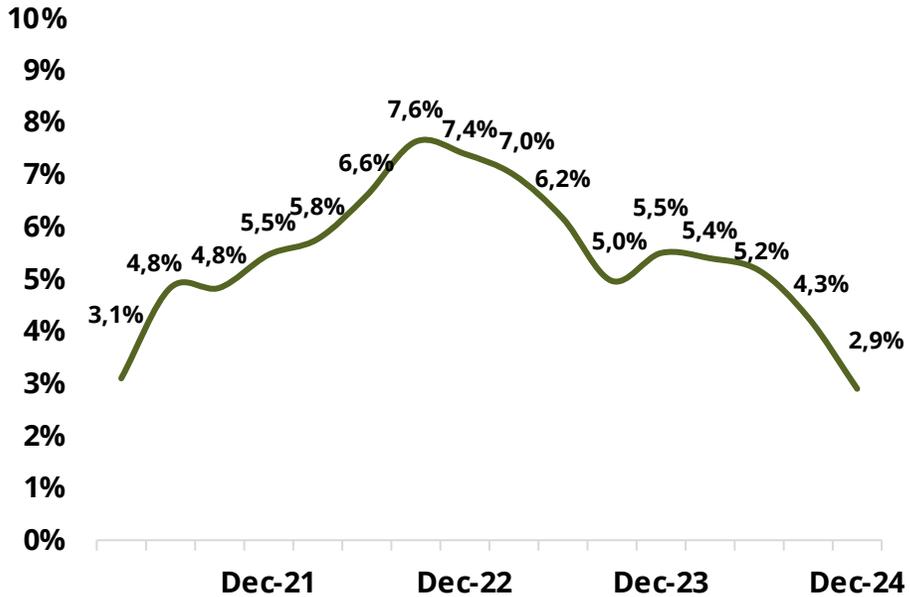


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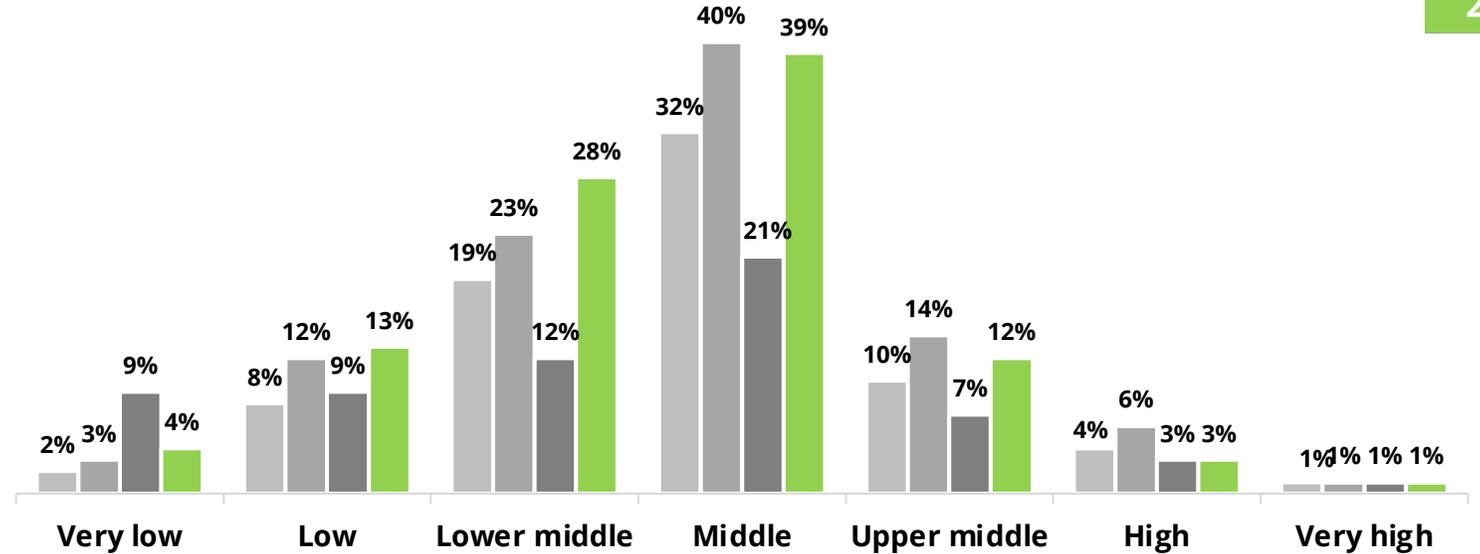
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South African Inflation Rate



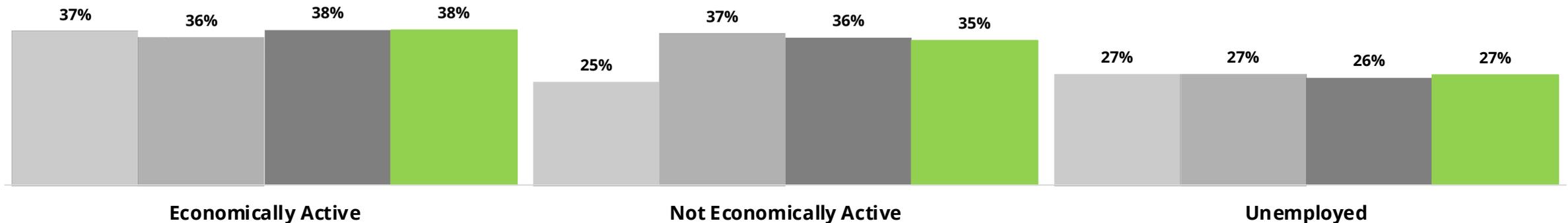
Which socio-economic class or group would you associate yourself with?



2021
2022
2023
2024

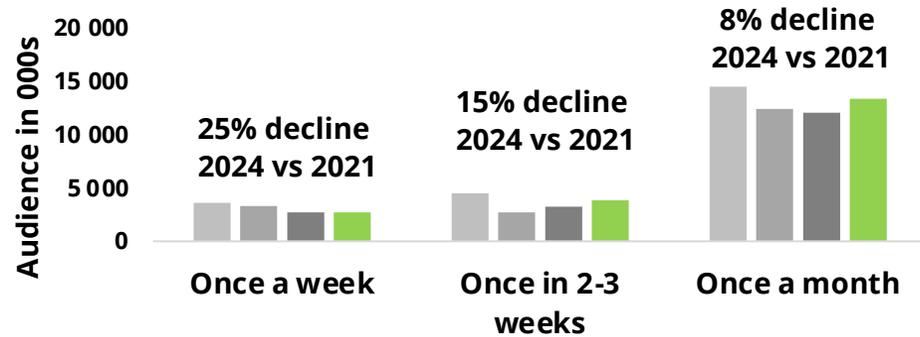


Working Status

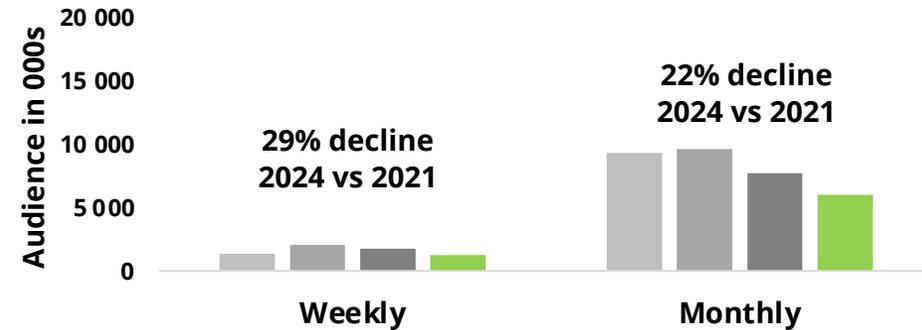


2021
2022
2023
2024

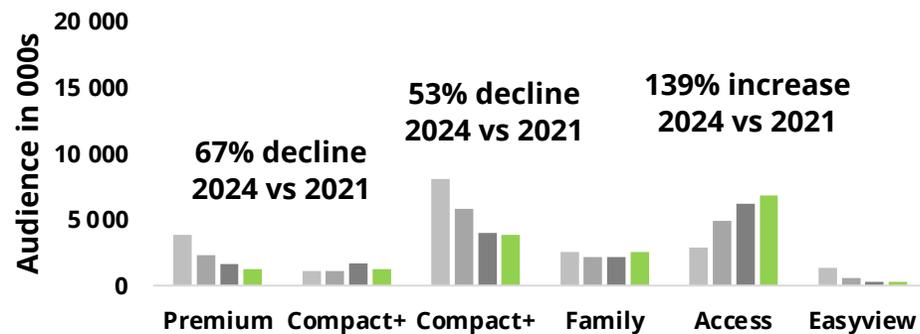
Fast Food – Frequency



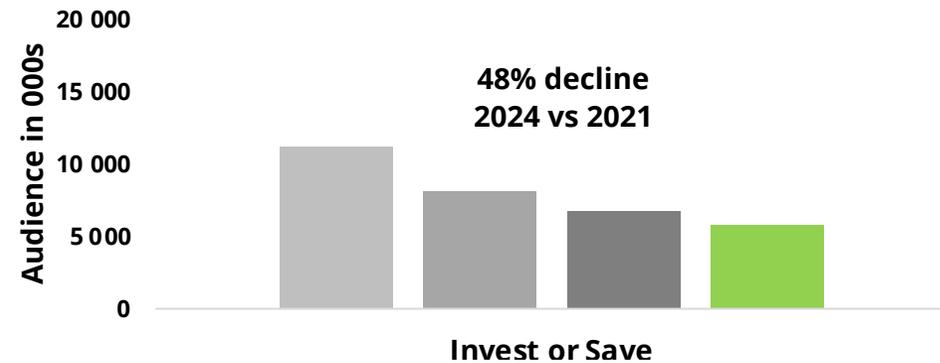
Eat Out - Frequency



DStv Subscription Base

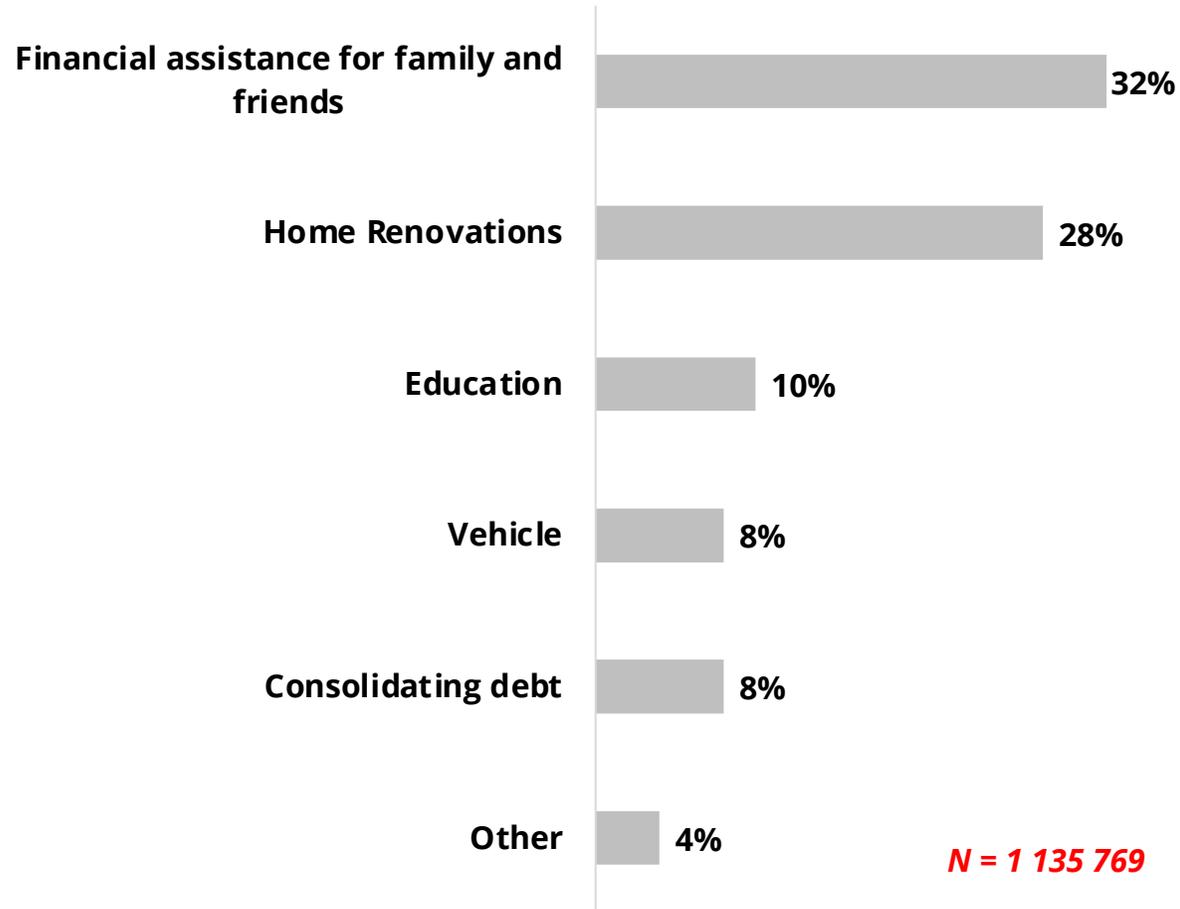


Save or Invest

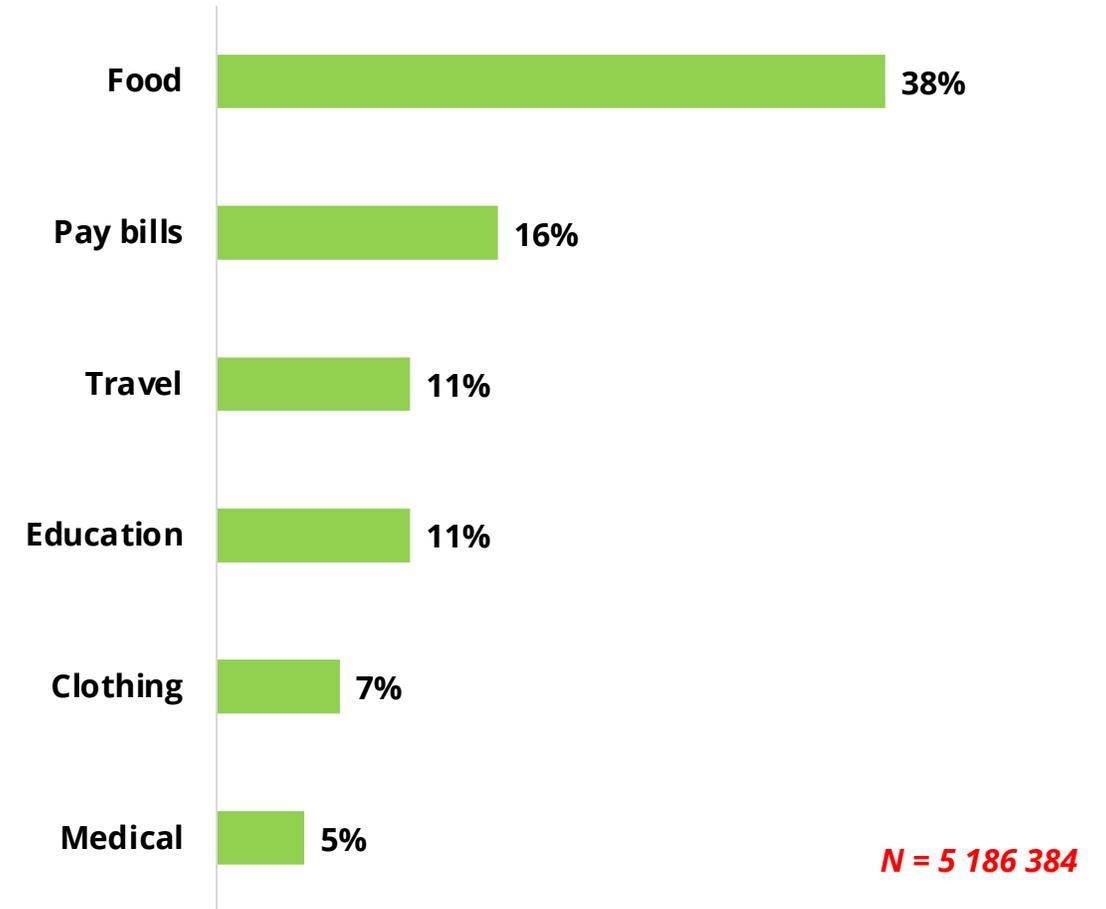


LOANS - TOP REASONS FOR LOANS TAKEN

2021

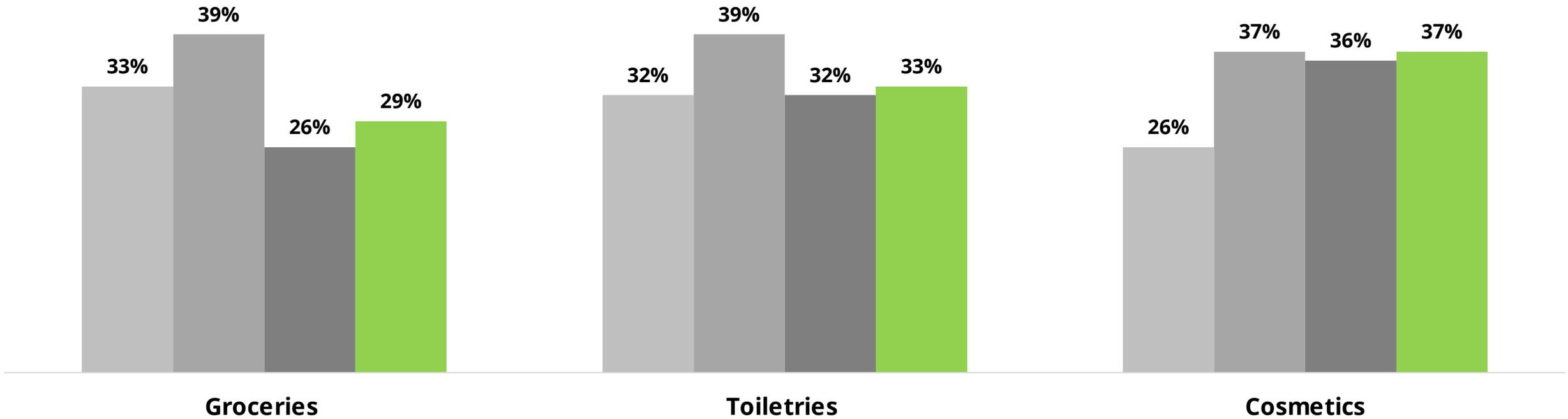


2024

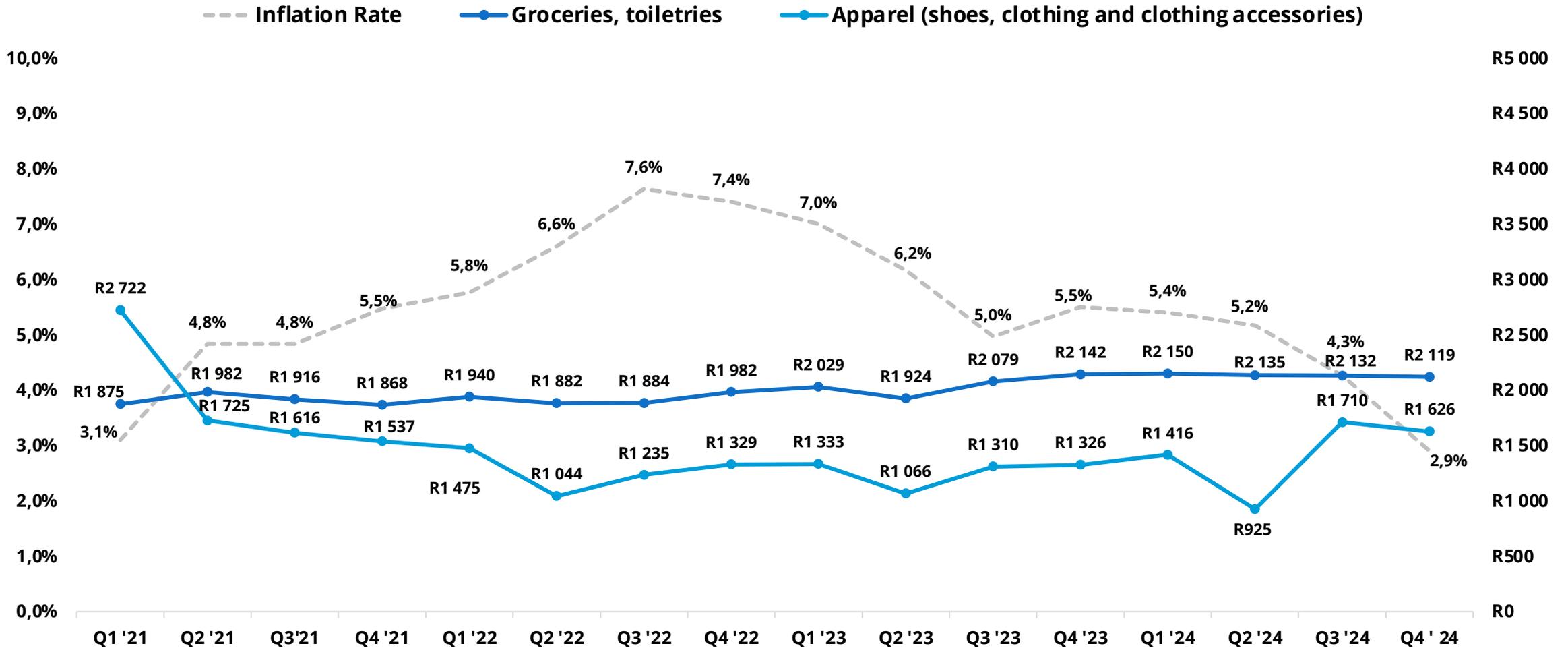


2021
2022
2023
2024

Do you always buy the same brands?



AVERAGE MONTHLY SPEND: GROCERIES + TOILETRIES & APPAREL: QoQ



*CPI Inflation rate figures provided by StatsSA (January 2025)

Media Landscape

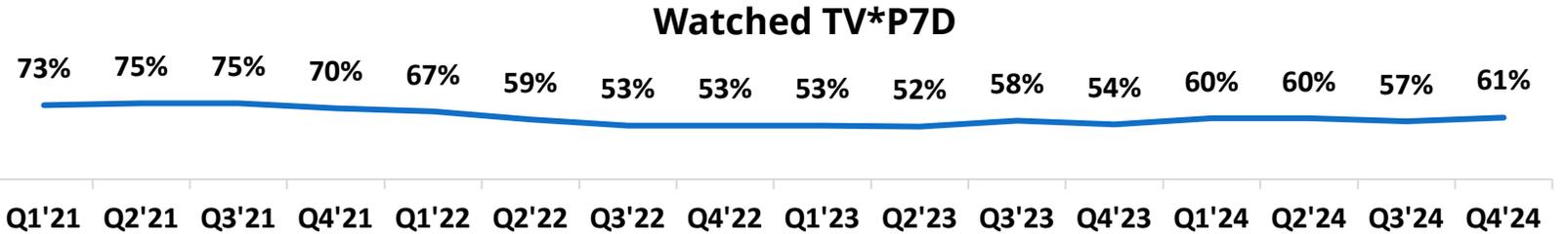


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TV LANDSCAPE (P7D)

17% of people spend **more than 20 hours** per week watching TV.



TOP 4 TV Channels Viewership

SABC 1 **40%** Watched P7D

e **32%** Watched P7D

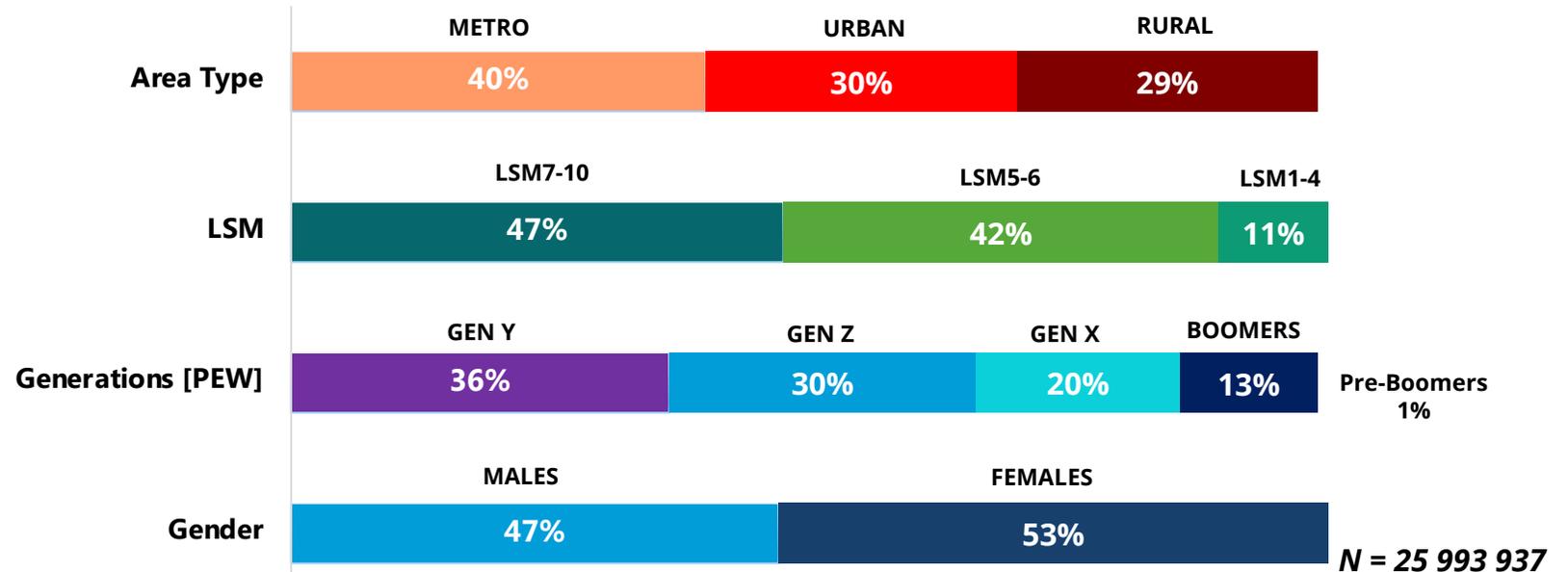
SABC 2 **22%** Watched P7D

SABC 3 **14%** Watched P7D

2024 TV Penetration (P7D)
60%

2024 DStv Penetration (P7D)
41%

DStv Exclusive Channels



ON-DEMAND STREAMING LANDSCAPE

21% of people have access to on-demand streaming services.

Top 3 Streaming services

NETFLIX

Access to Netflix
78%

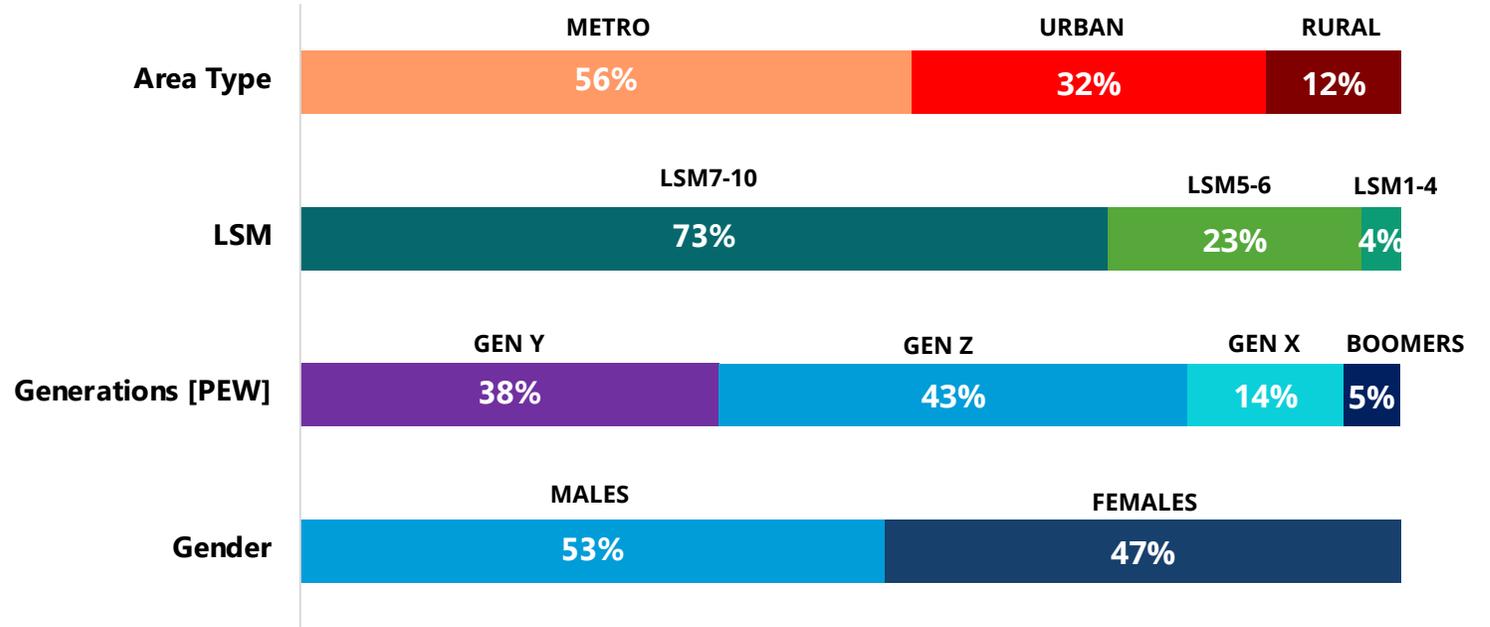
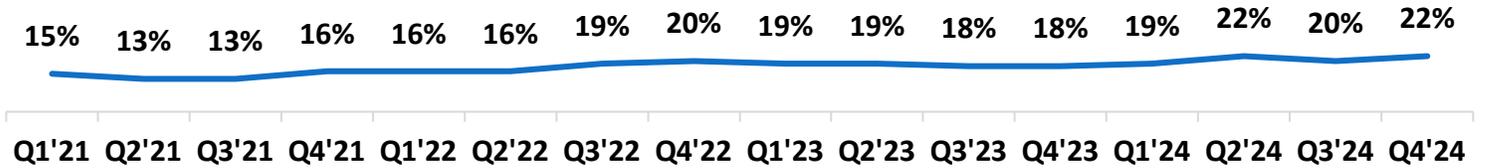


Access to Showmax
47%



Access to YouTube (PAID)
12%

On-demand streaming



N = 8 956 804

VIDEO CONTENT VIEWING ON SOCIAL MEDIA

35% people watched video content in the **(P7D)**

Top 4 Social Media Sites P7D

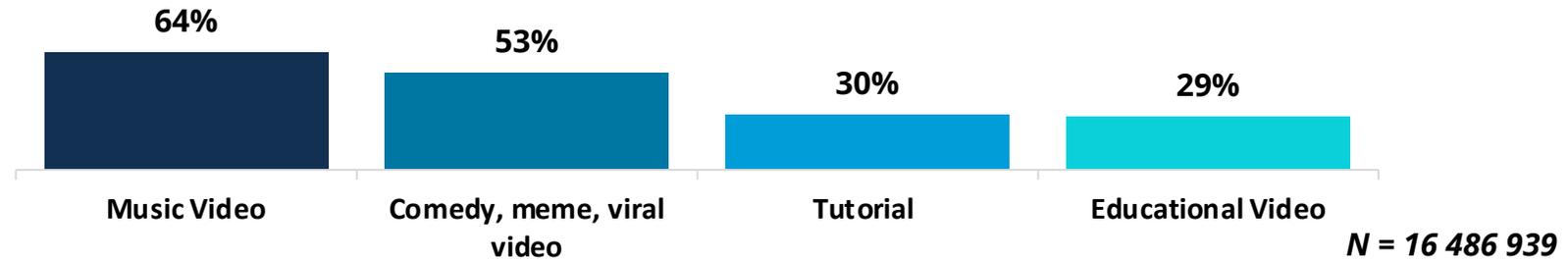
facebook Visited Facebook **74%**

 Visited TikTok **38%**

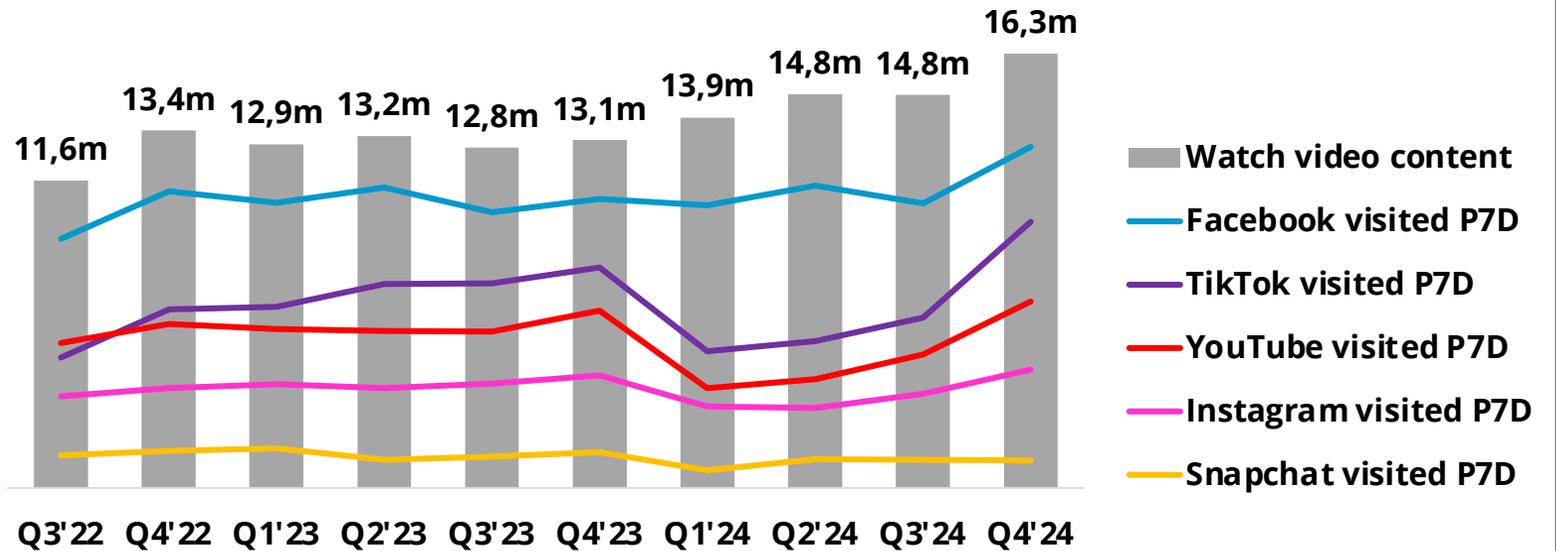
 Visited YouTube **27%**

 Visited Instagram **20%**

Video Content Types P4W



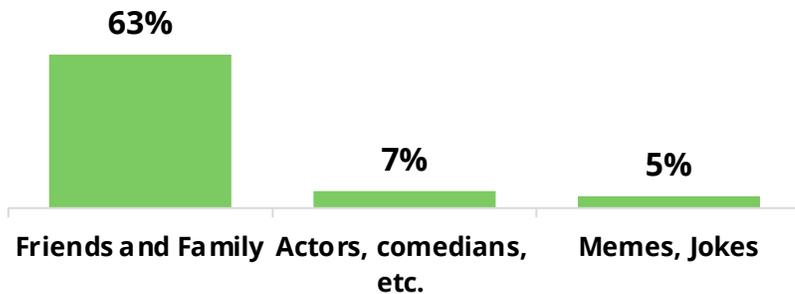
Filter: Video Content Viewed



25% of South Africans spend more than 20 hours per week on social media.

8.6M South Africans top social media profiles or pages followed is of **Friends, family and people they know.**

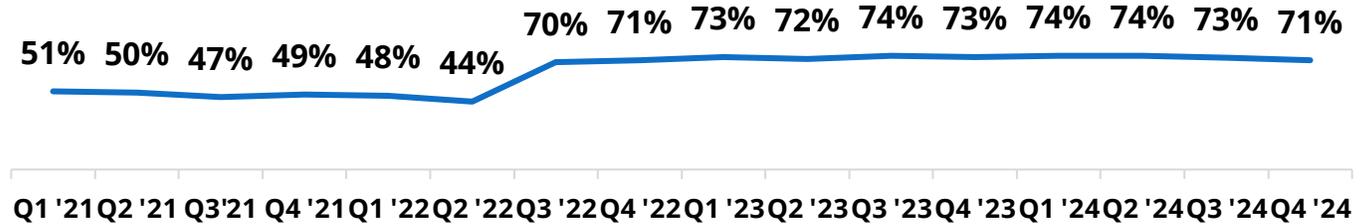
Top 3 Social Media Pages followed



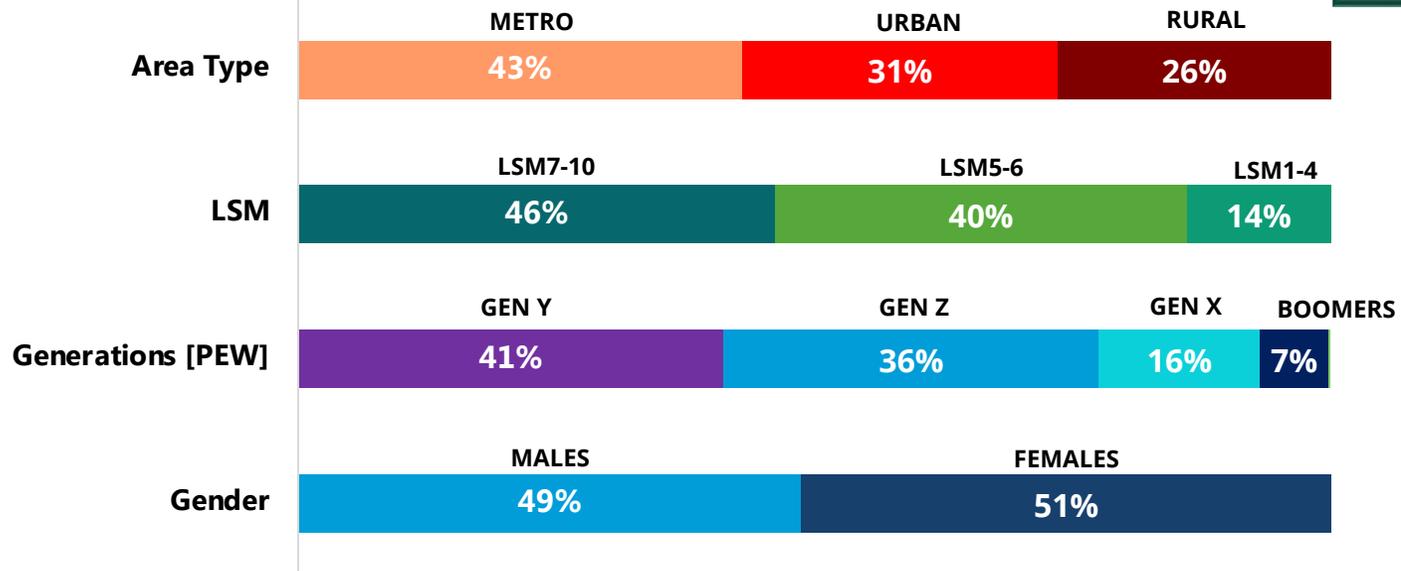
P4W: TOP 3 SOCIAL MEDIA PLATFORMS



Social Media* P4W

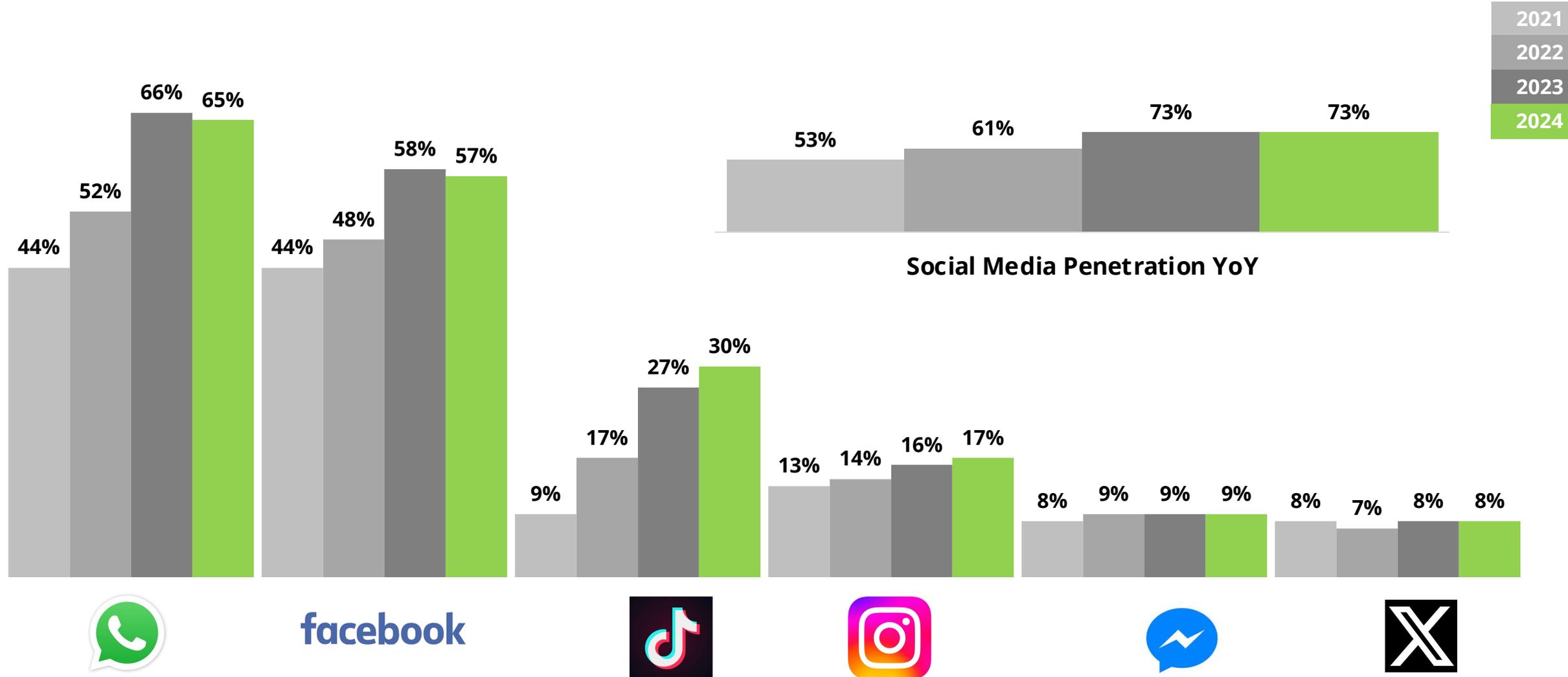


2024
Social Media Penetration (P4W)
73%

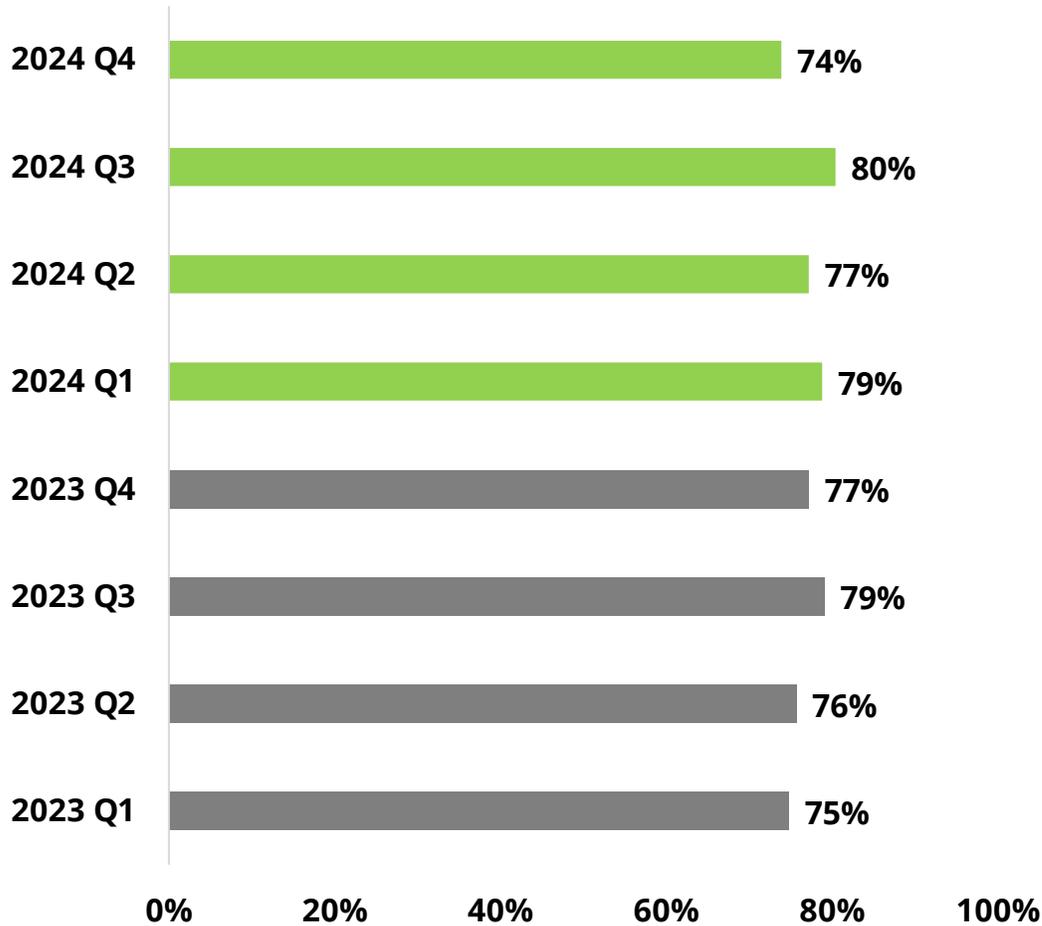


N = 31 780 483

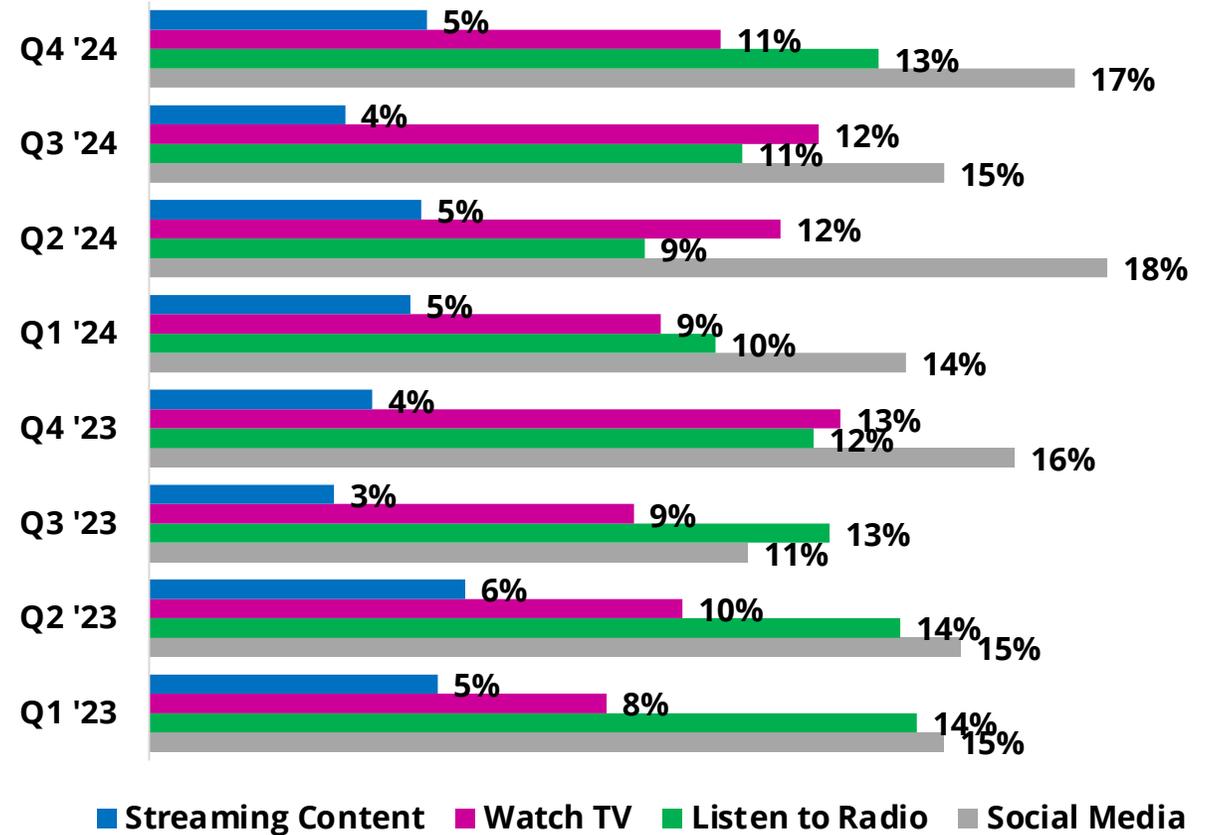
SOCIAL MEDIA SHIFTS: % POP YoY



Accessed Internet Past 7 Days

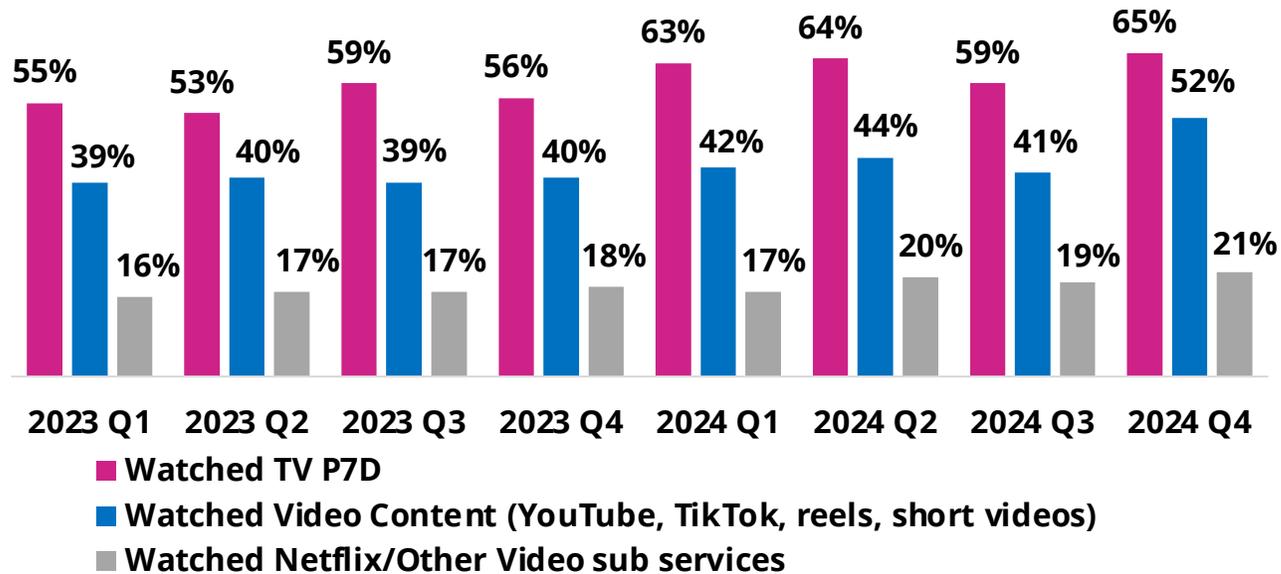


Other Activities While Surfing the Internet

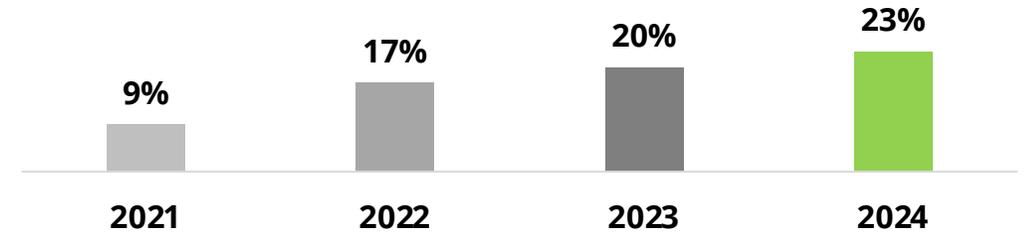


2023
2024

Video Content Viewing Total Population Filtered on Accessed Internet P7D



Internet Connection in the Home



4,3m Households now have fixed internet access, an increase of 37% increase between Year 2 and Year 4

84% of people who watched video content visited these social media platforms in the past seven days.



RADIO LANDSCAPE (P7D)

11% of people spend **more than 20 hours** per week listening to the radio

634K spend **more than 20 hours** per week listening to a podcast

17M listened to **Commercial Stations (P7D)**

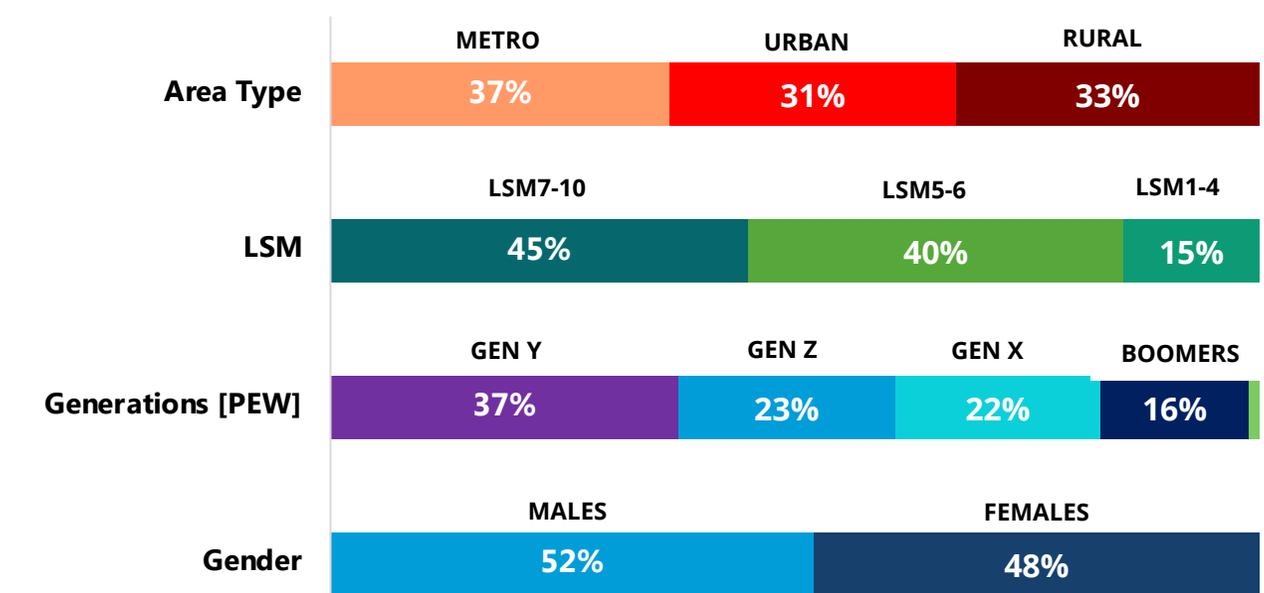
4M listened to **Community Stations (P7D)**

***77K** listened to **Internet radio stations (P7D)**

Listened to radio stations*P7D

68% 64% 63% 62% 59% 56% 58% 55% 56% 53% 49% 44% 46% 44% 47%

Q2 '21 Q3 '21 Q4 '21 Q1 '22 Q2 '22 Q3 '22 Q4 '22 Q1 '23 Q2 '23 Q3 '23 Q4 '23 Q1 '24 Q2 '24 Q3 '24 Q4 '24



2024
Radio Penetration (P7D)
45%

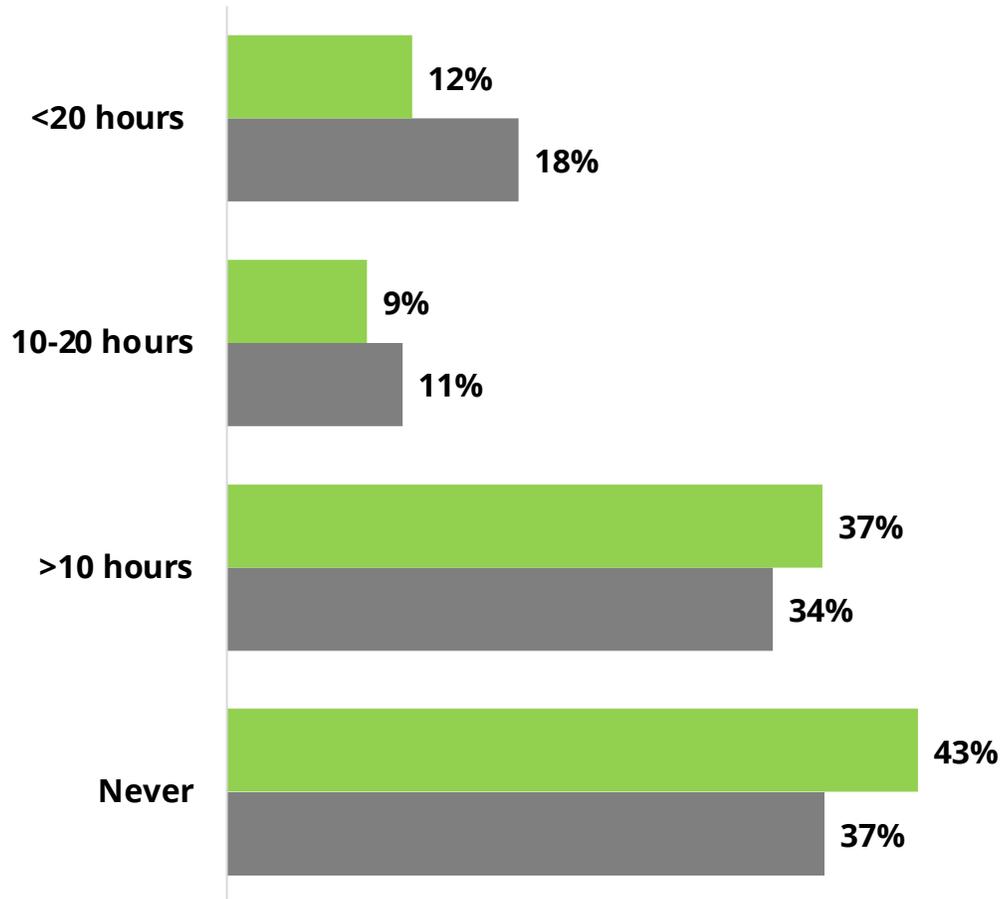
P7D: TOP 5 Radio Stations



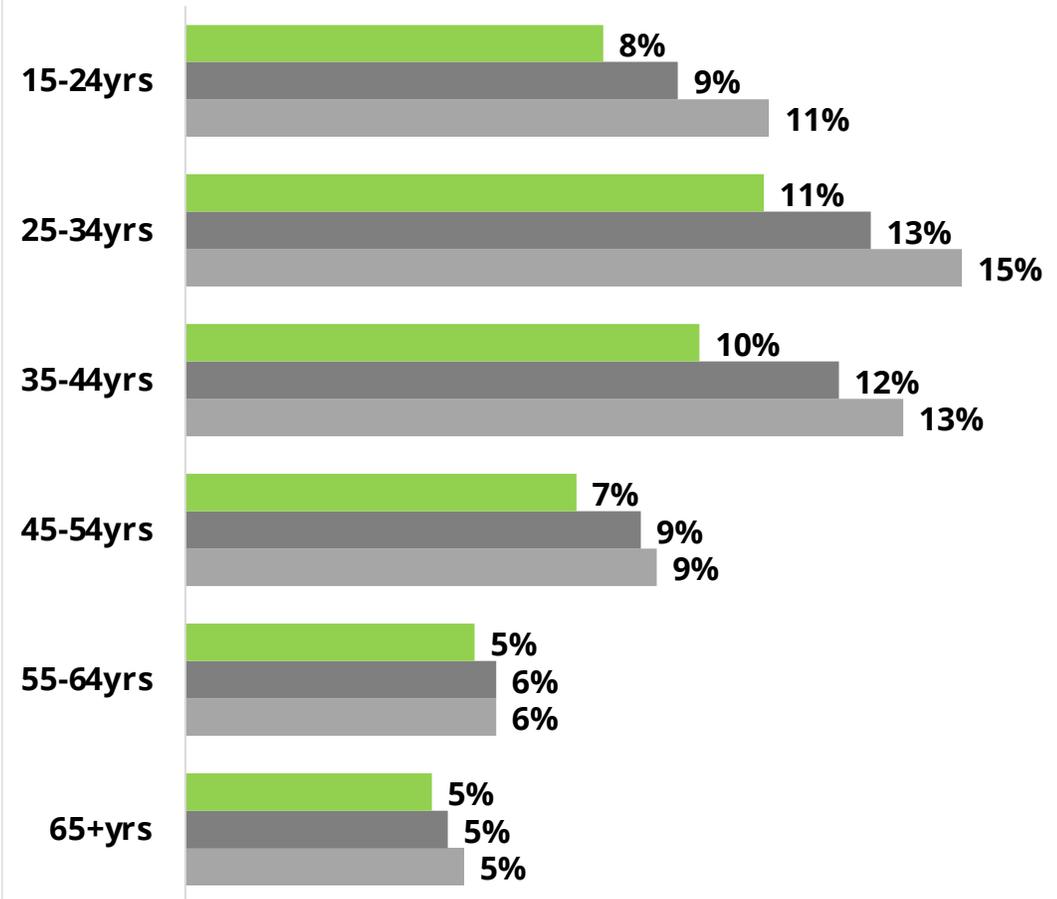
N=19 802 004

RADIO HOURS LISTENED / LISTENING BY AGE GROUP

Hours Listened in Average Week



Listened P7D

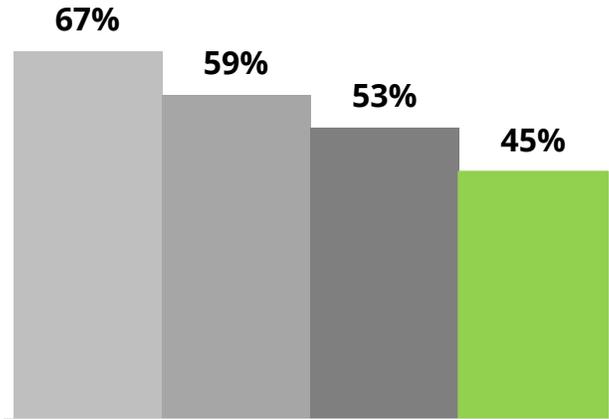


2023
2024

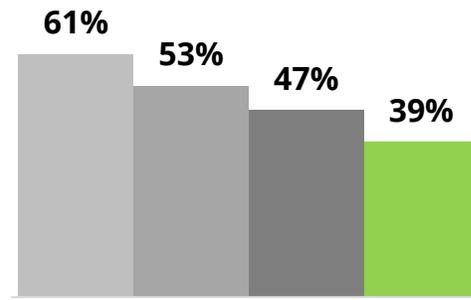
TOP 5 RADIO STATIONS P7D: % POP YoY

2021
2022
2023
2024

Radio Category: Past 7 Days



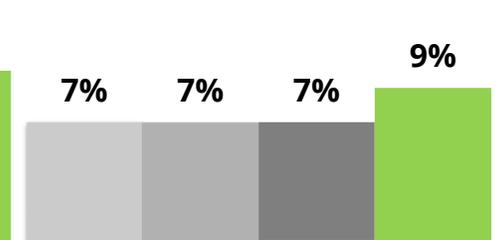
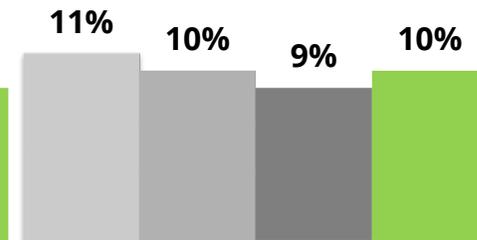
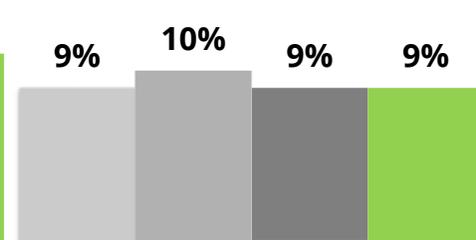
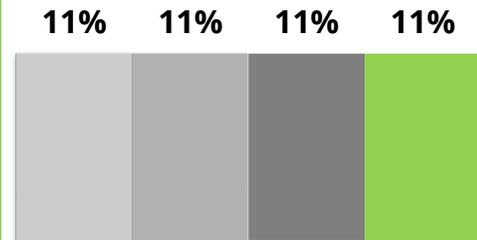
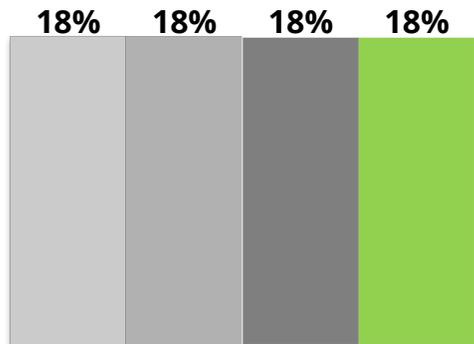
All Radio



Commercial



Community



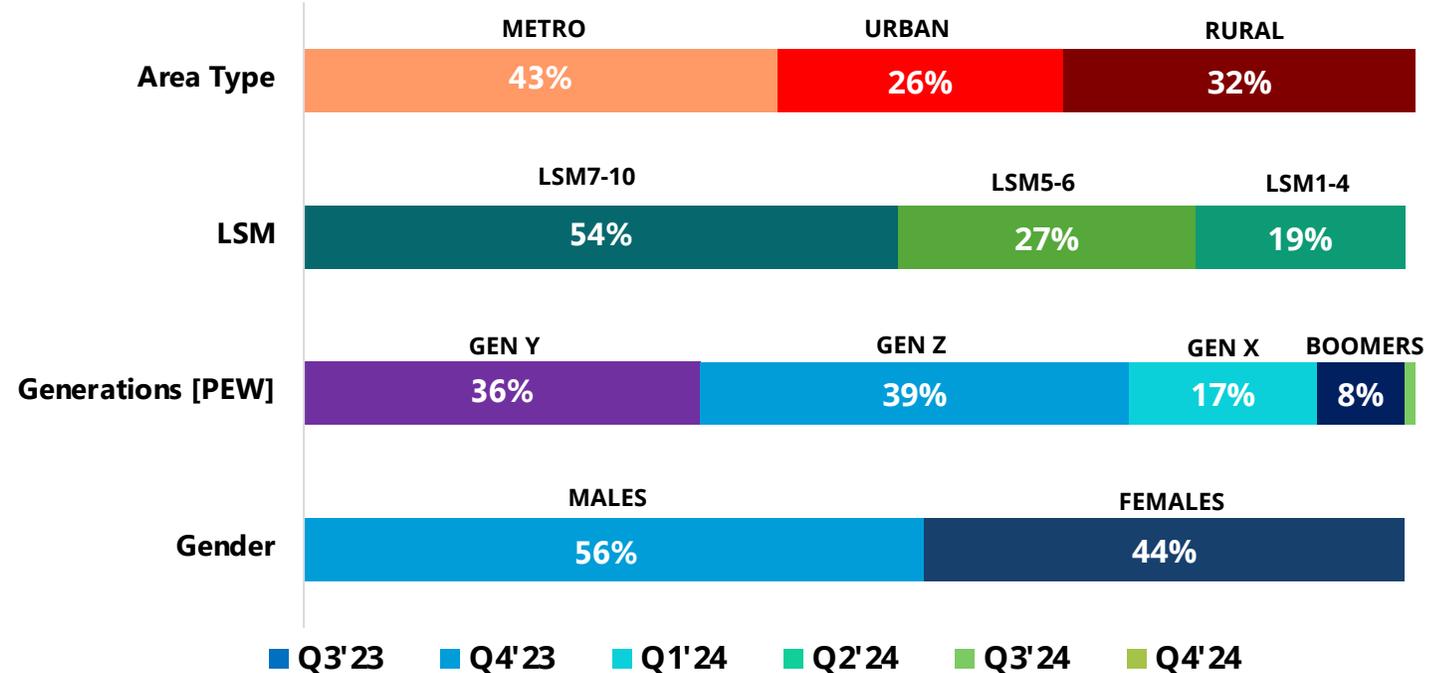
AUDIO/ MUSIC STREAMING LANDSCAPE

28% People stream audio weekly.

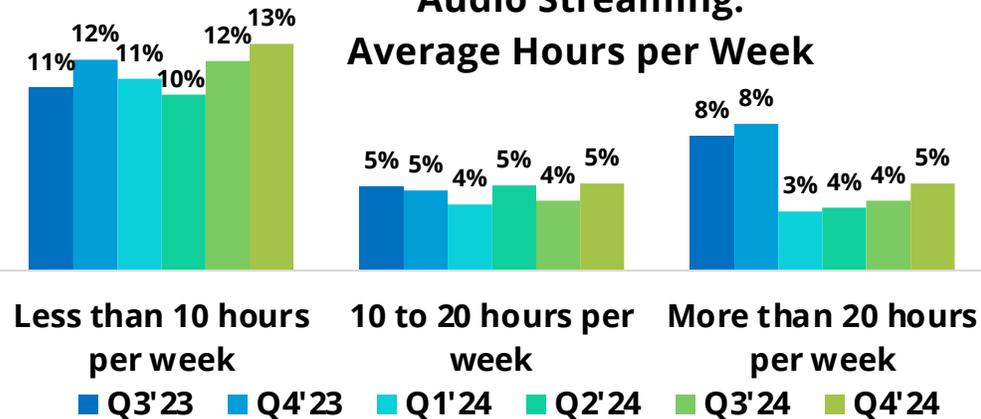
20% of people spend **more than 20 hours** per week streaming audio.

12.2M people **have access** to audio online streaming services.

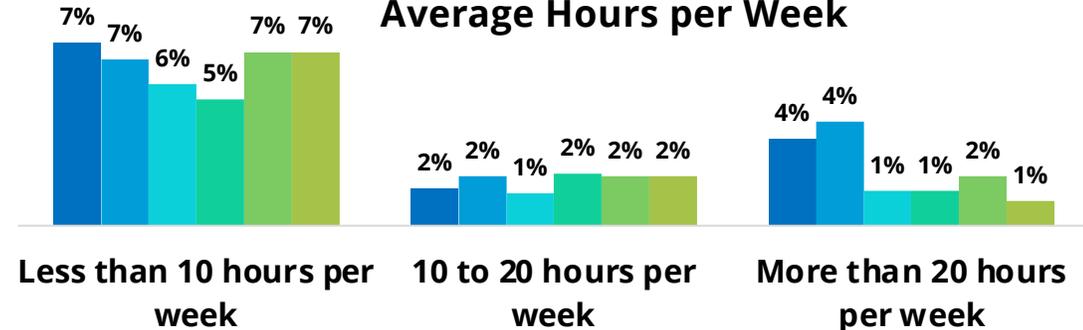
5% people **download vod/podcasts** weekly.



Audio Streaming: Average Hours per Week



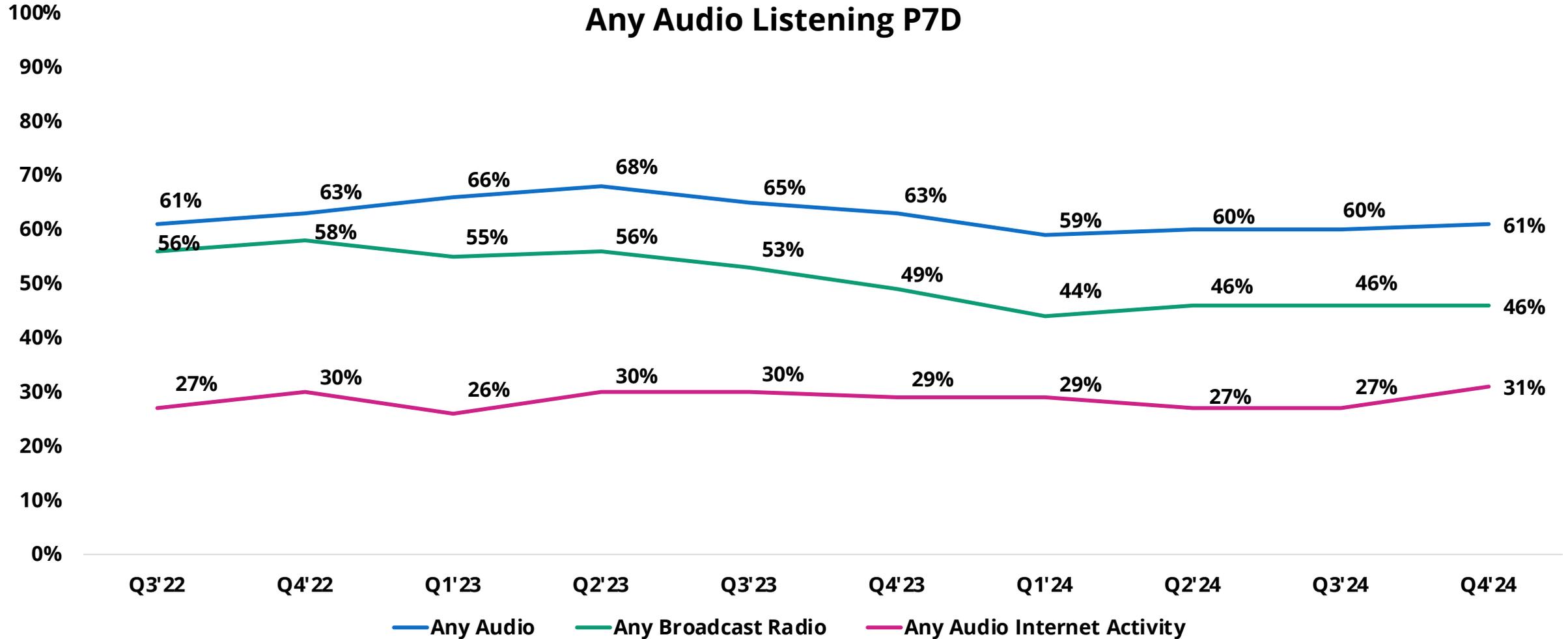
Podcasts: Average Hours per Week



N = 2 513 805

ANY AUDIO LISTENING PAST 7 DAYS

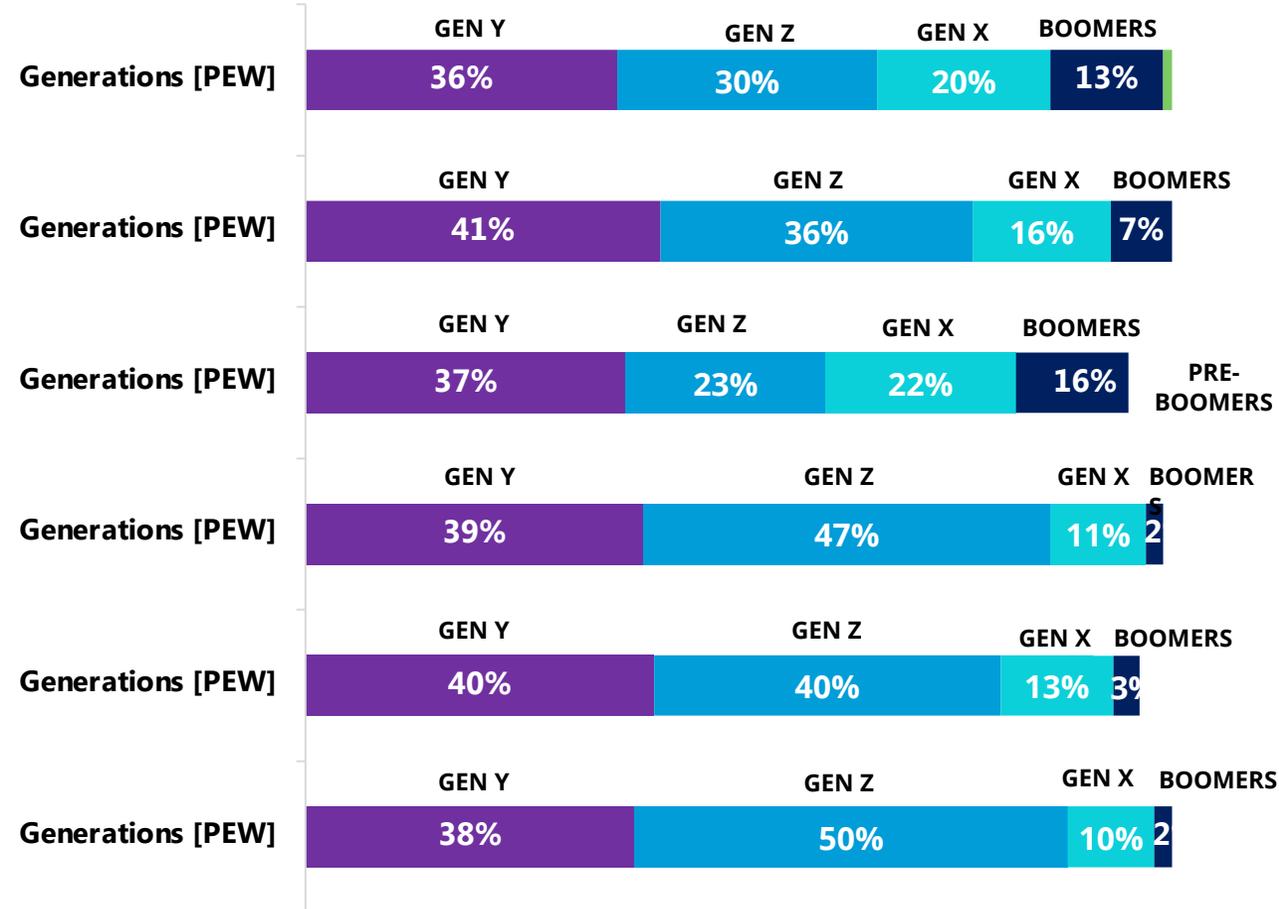
Any Audio Listening P7D



Any Audio Listening = Listened to Broadcast Radio P7D **OR** Internet Activity P7D Download Music **OR** Download Podcasts/Vodcasts **OR** Listen to Radio via Internet/App **OR** Stream Music

ELECTRONIC MEDIA: PENETRATION & TIME SPENT (AVG. WEEK)

	Time spent (avg. week)	% of Pop (1hr+ avg. week)	% Penetration (Annual)
TV:	<10hr: 56% 10hr+: 44%	69%	60% P7D
Social:	<10hr: 40% 10hr+: 60%	67%	73% P4W
Any Radio:	<10hr: 65% 10hr+: 35%	57%	45% P7D
Audio Streaming:	<10hr: 58% 10hr+: 42%	20%	28% Weekly
Video Streaming:	<10hr: 49% 10hr+: 51%	18%	35% P7D
Podcasts:	<10hr: 66% 10hr+: 34%	9%	5% Weekly



CINEMA LANDSCAPE

517K people regularly go to the **Cinema** once every 2 to 3 months.

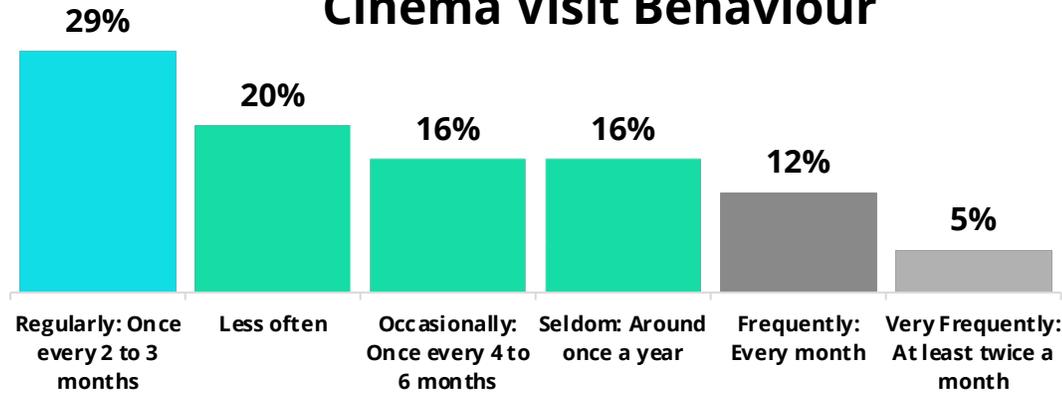


R423 average cinema outing cost.

TOP 4 Cinema Chains Visited

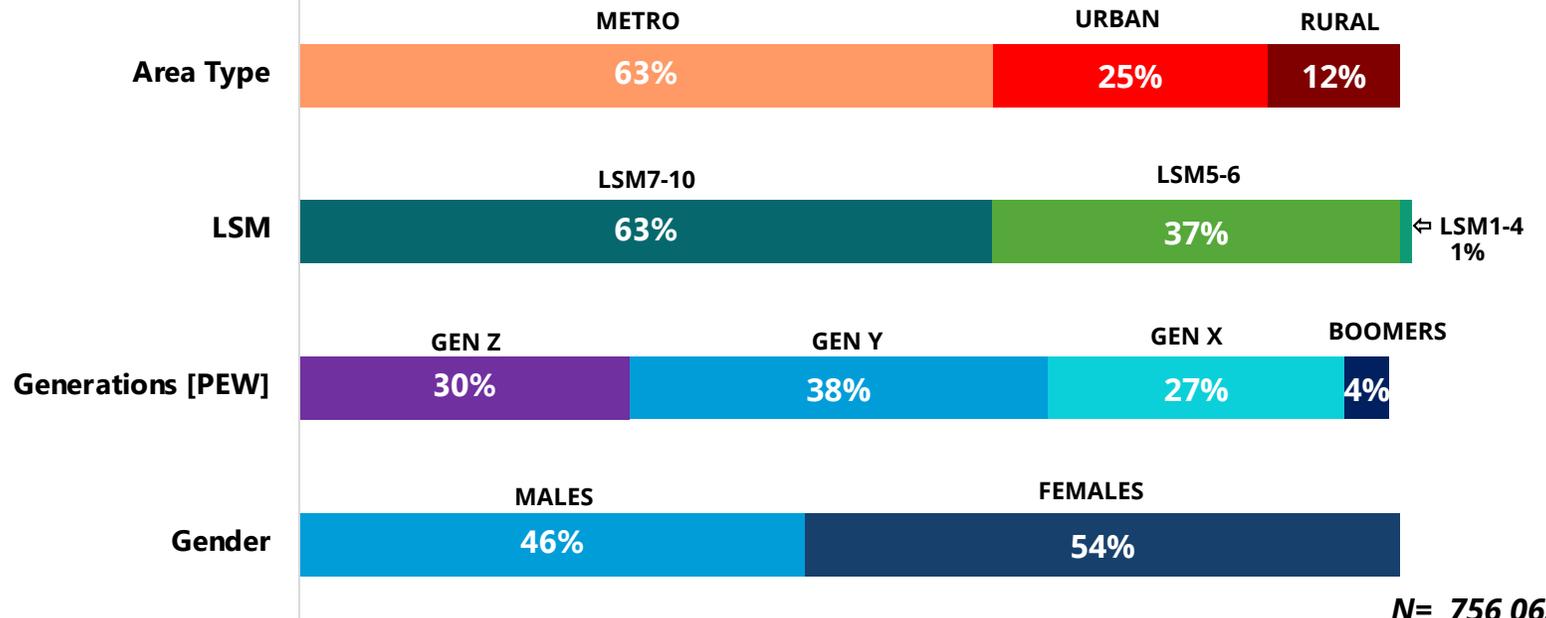
	725K Visited most often
	698K Visited most often
	158K Visited most often
	67K Visited most often

Cinema Visit Behaviour



2024 Cinema Penetration (P4W) **2%**

N = 110 352



N= 756 063

MAGAZINE LANDSCAPE (P3M)

3.4M People read magazines in the (P3M)

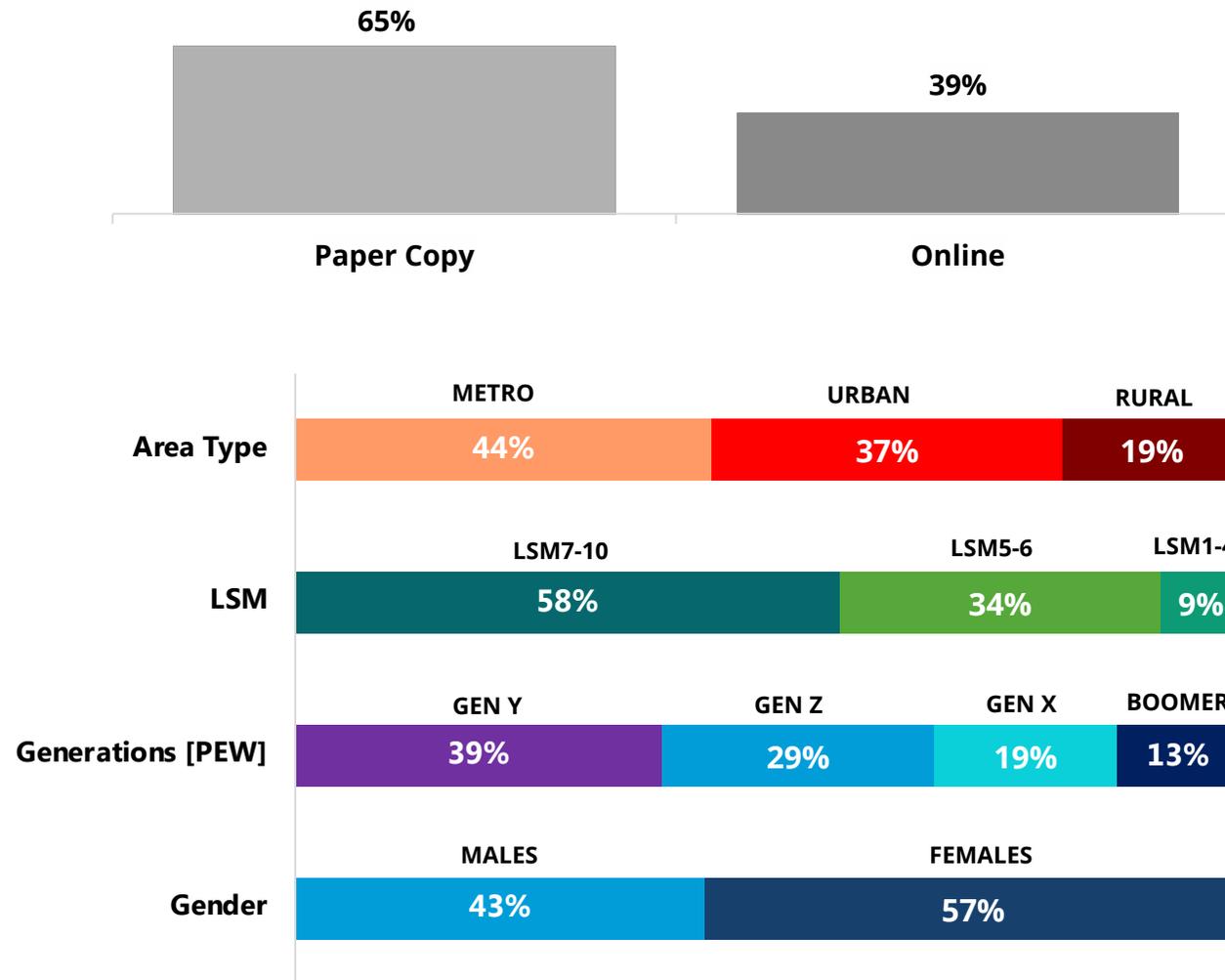
Top 4 Magazines

DRUM 19% Read P3M

HUISgenoot 10% Read P3M

YOU 10% Read P3M

Kuier 7% Read P3M



2024 Magazine Penetration (P3M) **8%**

2024 Magazine AIR Penetration (ANY) **4%**

N = 3 432 737

STORE MAGAZINE LANDSCAPE (P3M)

5.0M People read Store magazines in the **(P3M)**

Top 4 Store Magazines



1.5M Read P3M



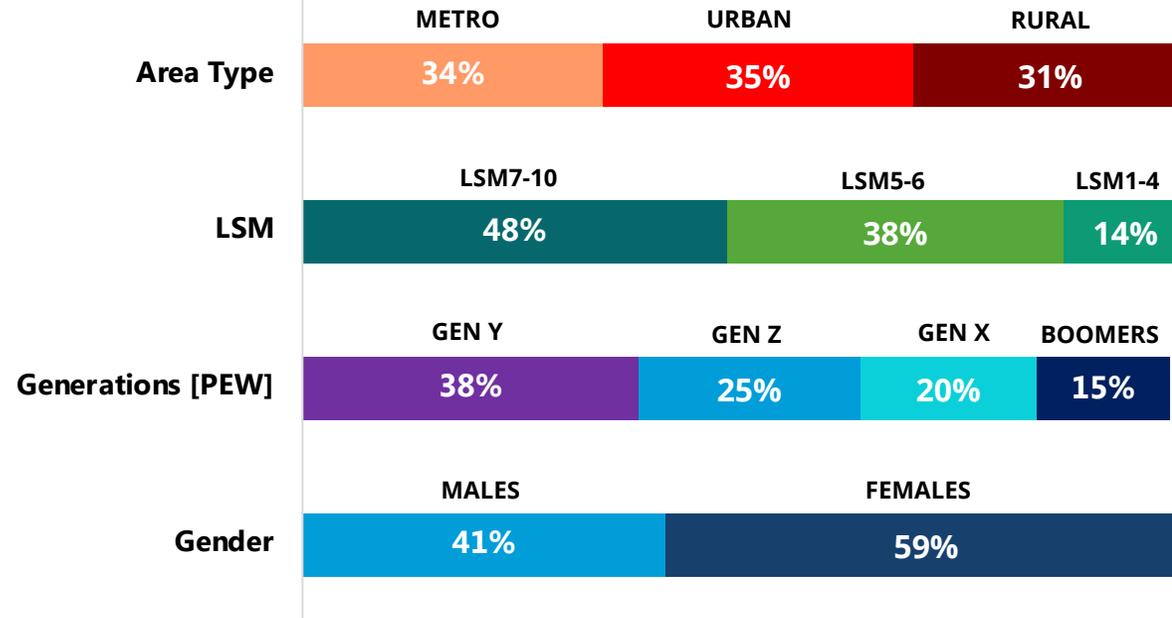
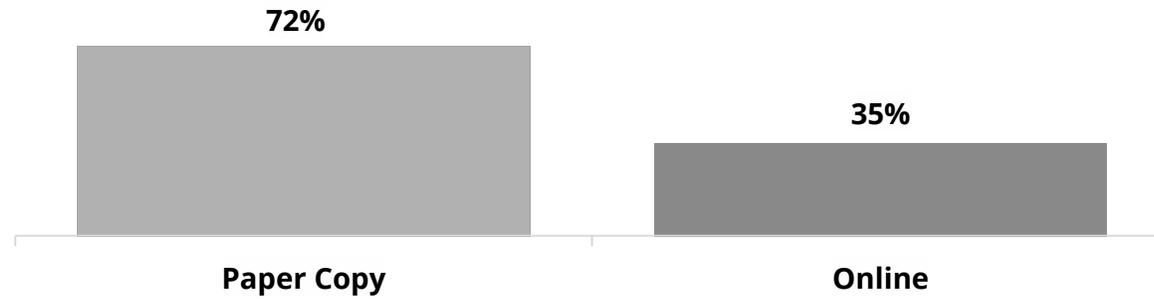
1.3M Read P3M



1.2M Read P3M



0.9M Read P3M



2024
Store Magazine Penetration (P3M)
12%

2024
Store Magazine AIR Penetration (ANY)
4%

N = 5 041 130

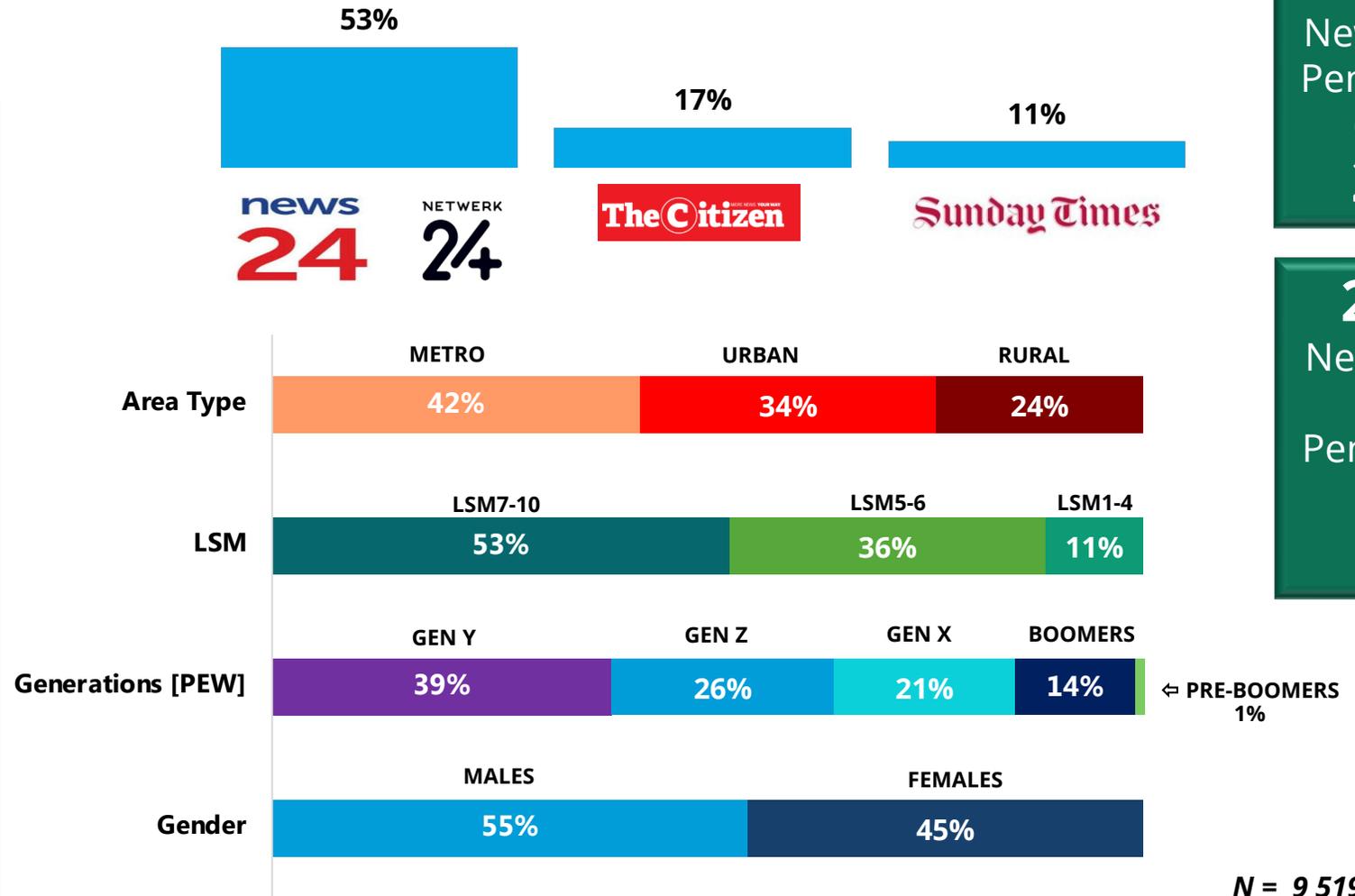
NEWSPAPER LANDSCAPE (P3M)

9.5M People read Newspapers in the **(P3M)**

Top 4 Daily Newspapers

DAILY SUN	2.2M Read P3M
Isolezwe <small>NGEMPELASANTO</small>	1.4M Read P3M
Sowetan	527K Read P3M
DailyNews	599K Read P3M

PAID NEWS ACCESS

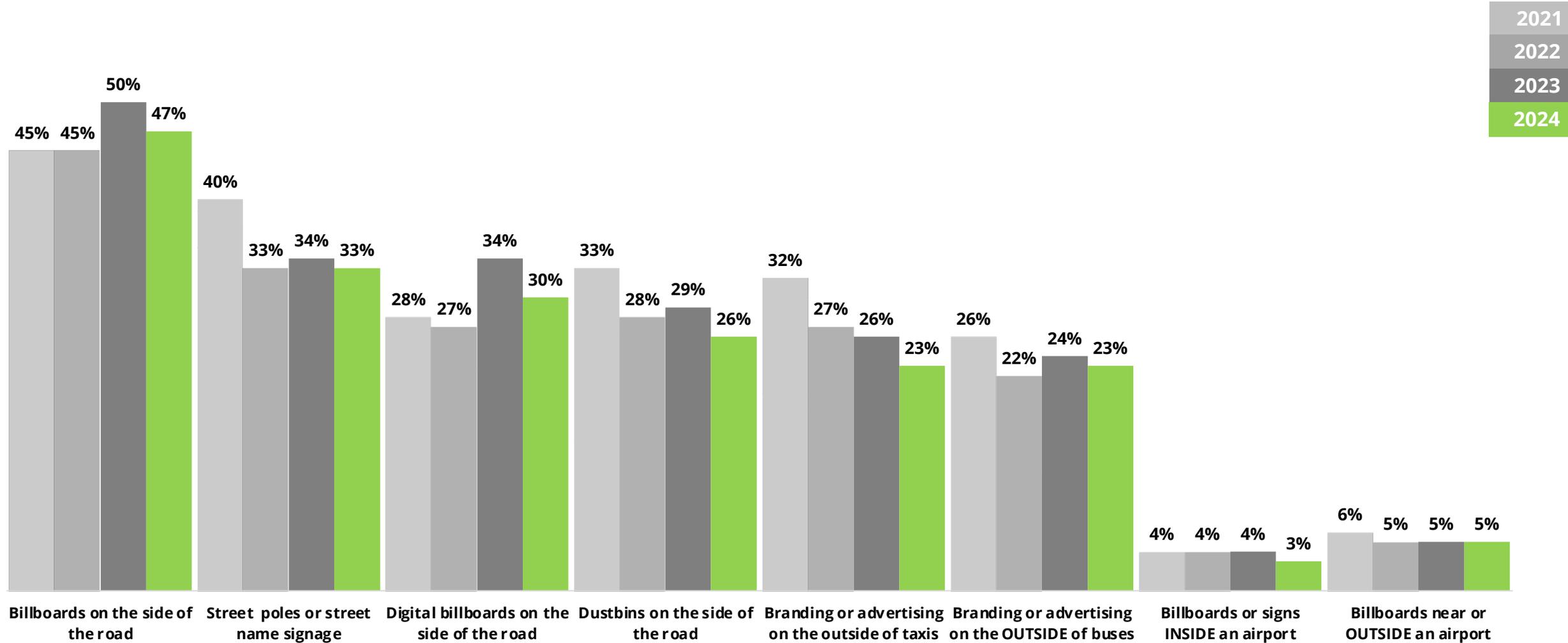


2024 Newspaper Penetration (P3M) **22%**

2024 Newspaper AIR Penetration (ANY) **6%**

N = 9 519 016

OUT OF HOME P4W SHIFTS: % POP YoY



Financial Services



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73% have a bank account excluding the SASSA accounts



57% of medical aid cover respondents are the main members.

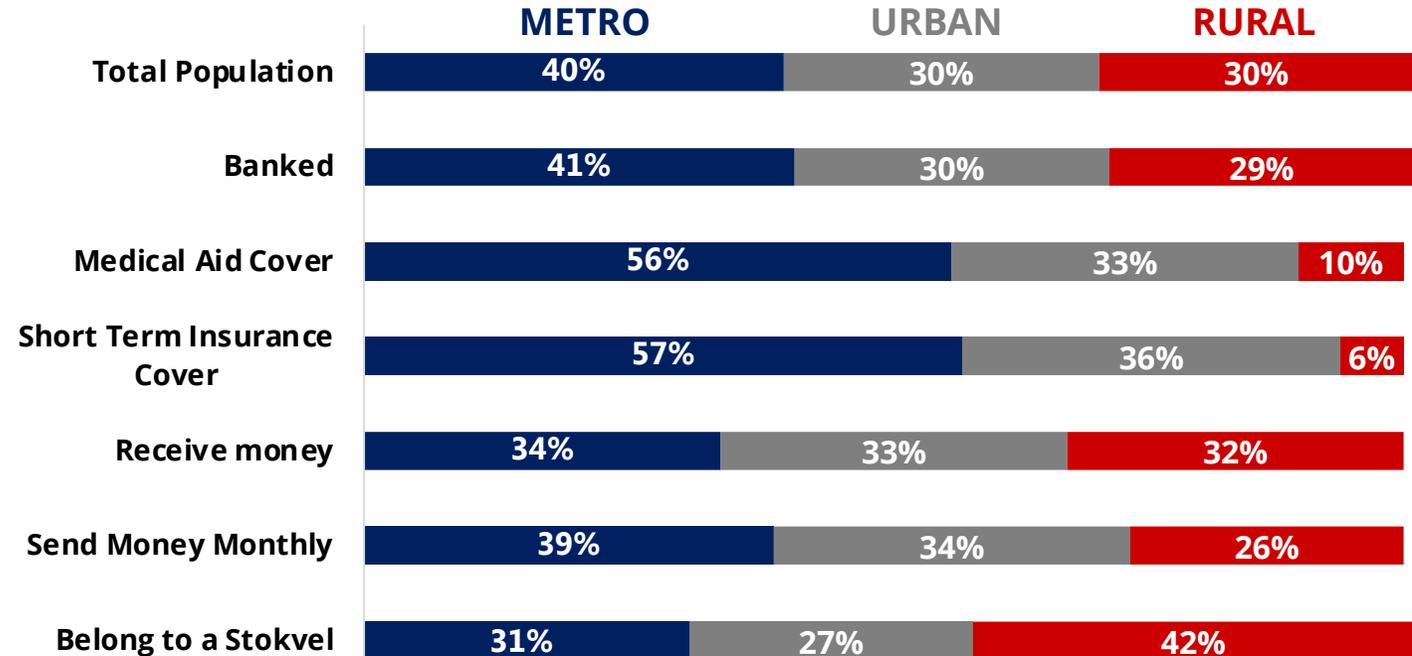


36% are insured

32% have funeral insurance or policy

3% have short term insurance.

Distribution by Area

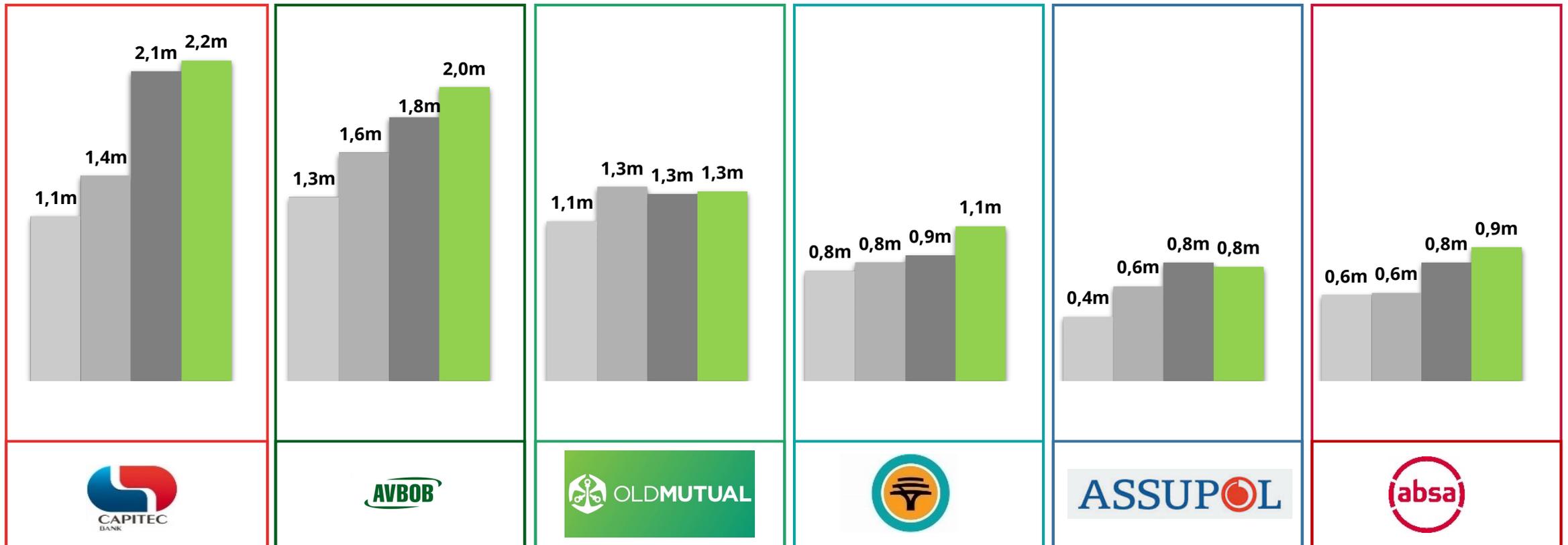


22% transfer or send money to family or friends monthly. On average **R1043** is sent.

7.7% belong to a stokvel.

ANY INSURANCE BY COMPANY USED: YoY

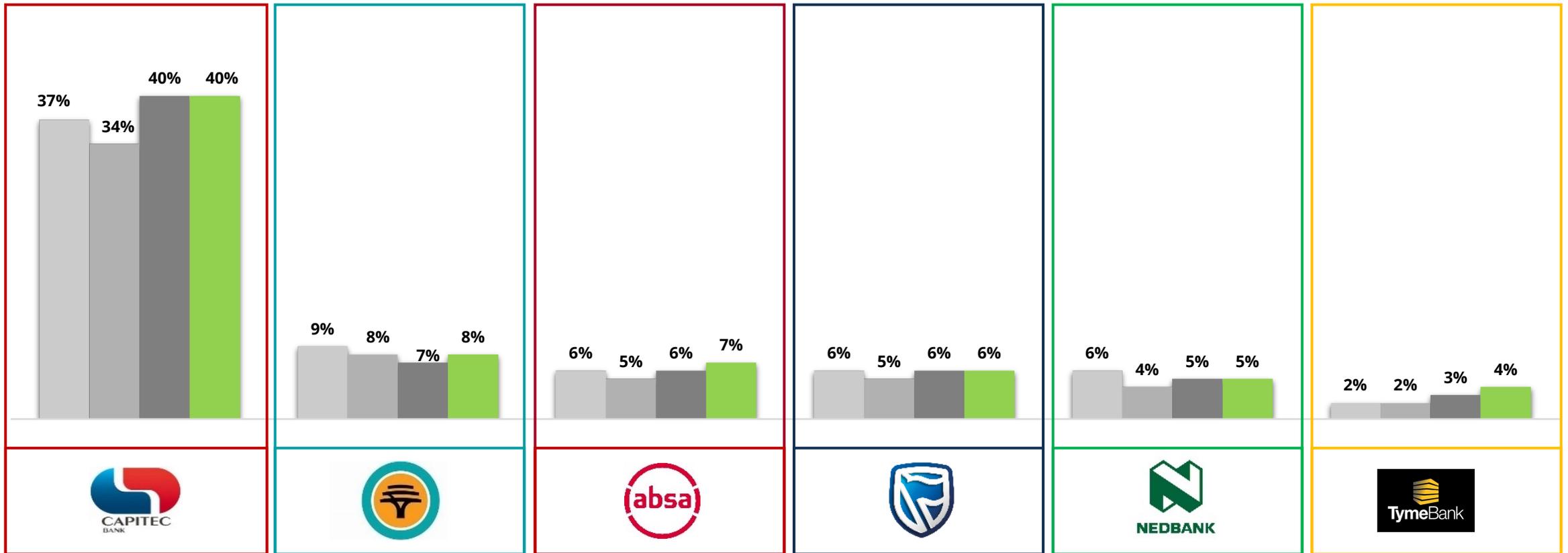
2021
2022
2023
2024



* Medical insurance (not medical aid) is included in overall insurance calculation.

PRIMARY BANK: YoY

2021
2022
2023
2024



Retail



MARKETING RESEARCH
FOUNDATION

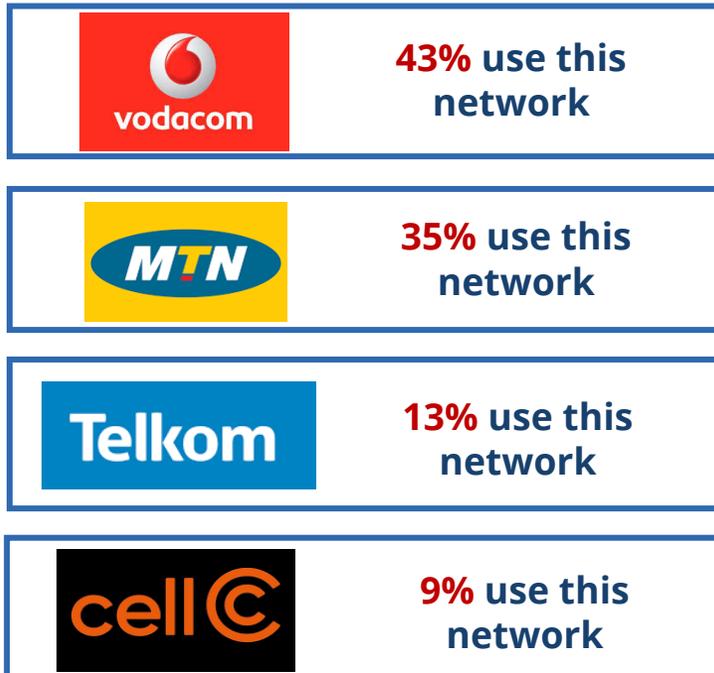
PLUS 94
RESEARCH



80% people spent **R300 or less** and **18%** people spent **more than R300** on cell phones per month (include calls, subscriptions, SMSs, vouchers and data)

Top 4 Networks

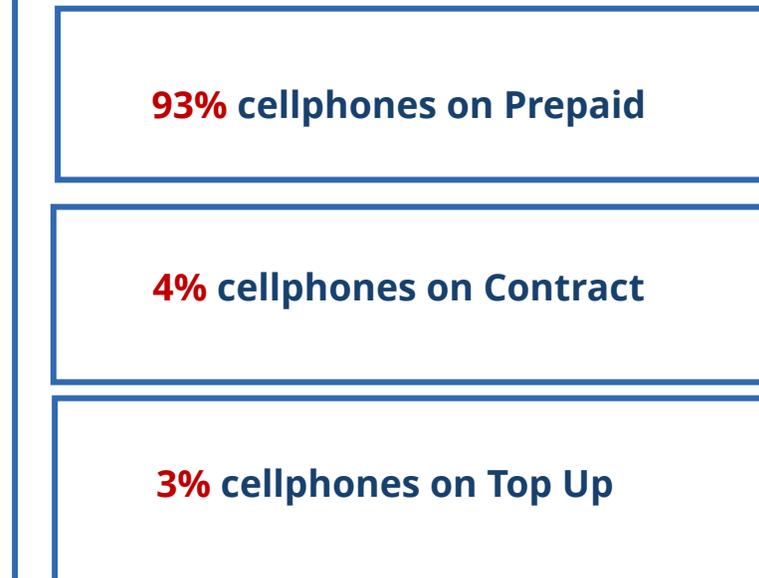
*For phones 1 and 2



N = 42 733 878

SIM Options

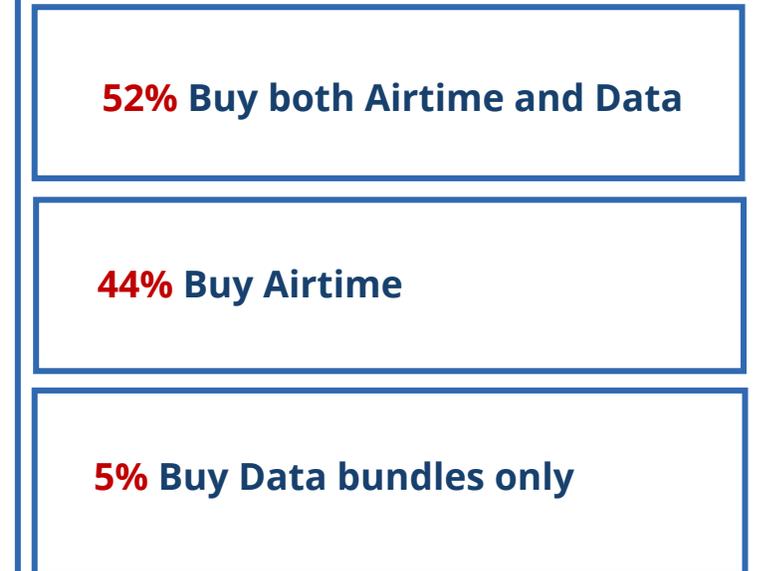
*For phones 1 and 2



N = 43 018 565

Buying Preference

*For phones 1 and 2



N = 43 018 565

Top 3 online shopping categories [P4W]

1. Communications/cellphones/prepaid (minutes/data/SMS)

6.1 million

2. Clothing

1.5 million

3. Food/drink

1.6 million

929K most often use food delivery service when purchasing take-aways.



P4W
273K

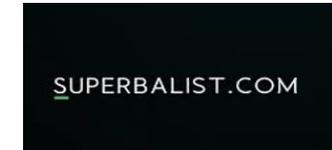


P4W
271K

CLOTHING PURCHASE ONLY*

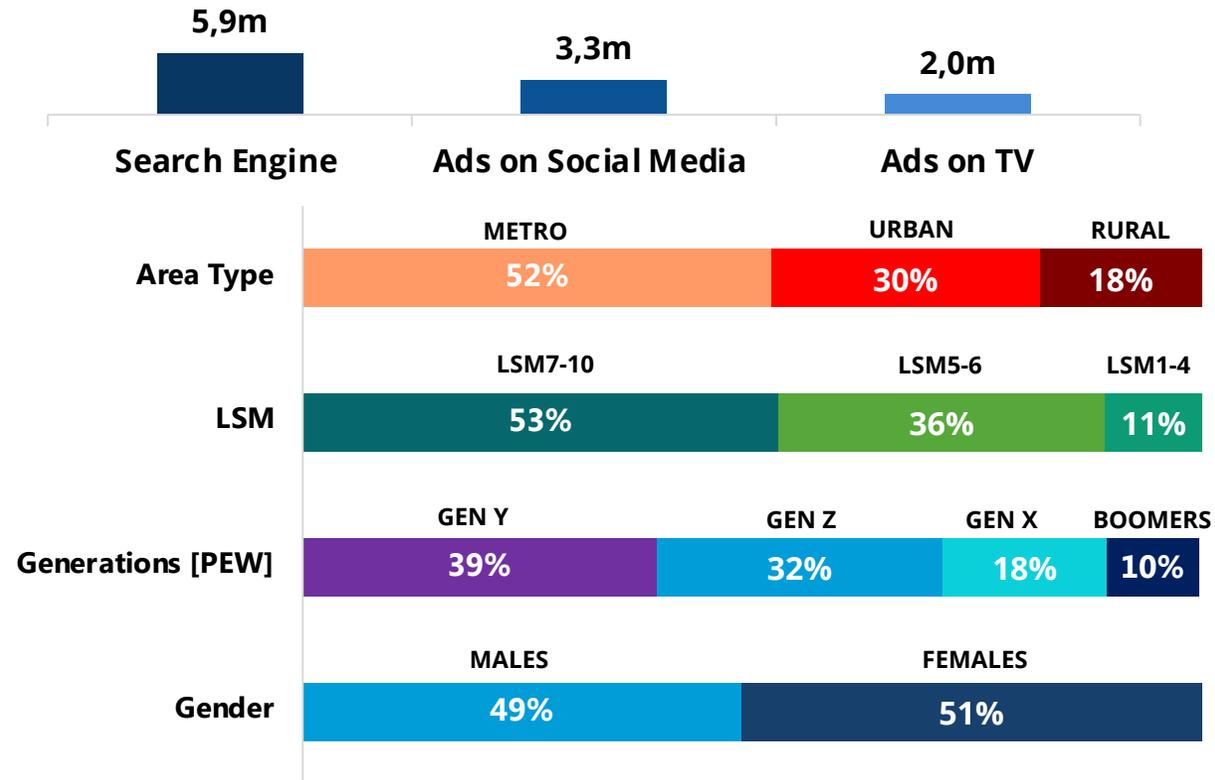


P3M
549K*



P3M
50K*

*How do you discover new brands?

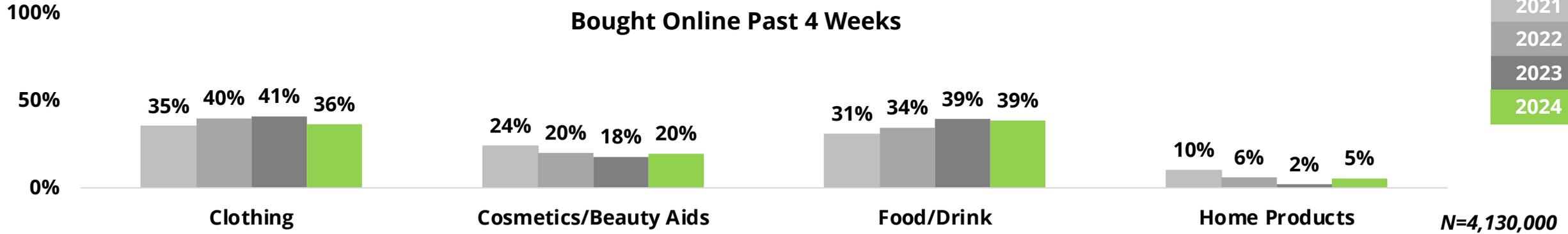


2024
E-Commerce Penetration (P4W)
22%

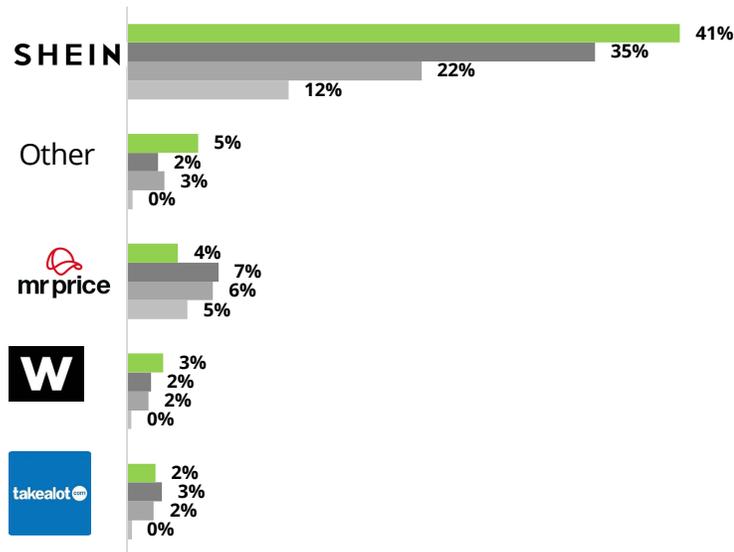
20%
Research Brands before purchasing

N=9 157 119

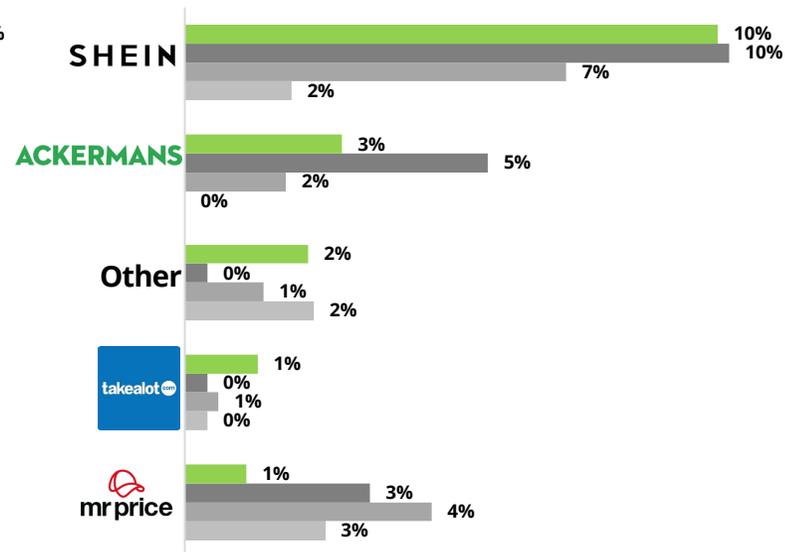
CLOTHING: ONLINE SHOPPING



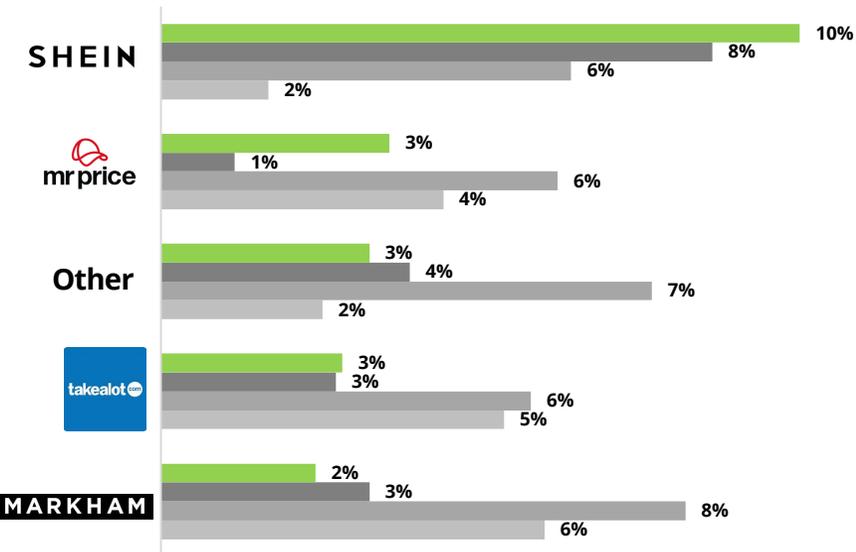
Top Online Retailers: Women



Top Online Retailers: Children



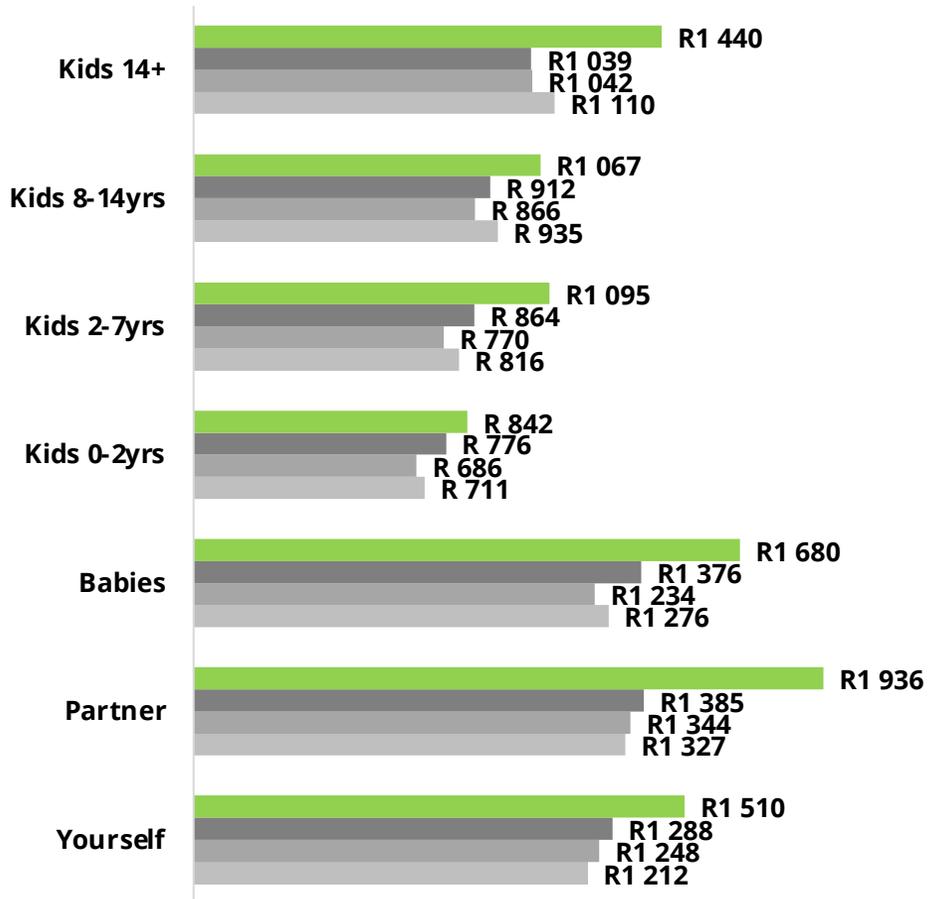
Top Online Retailers: Men



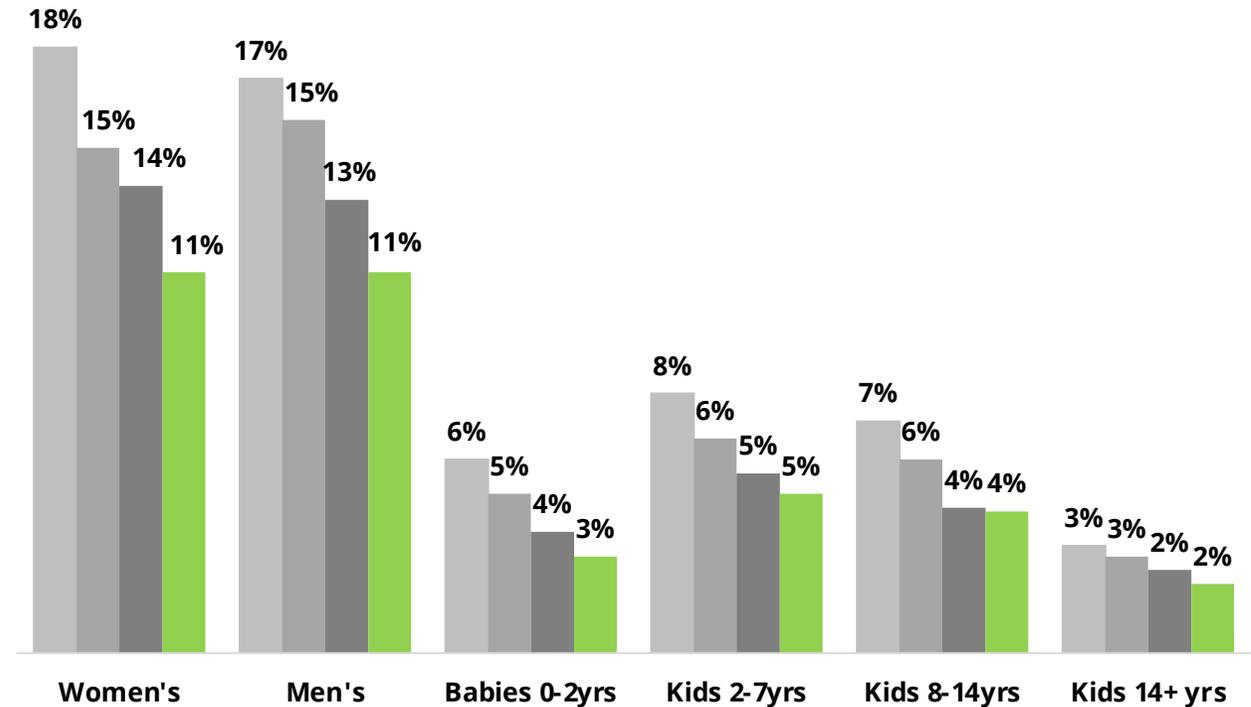
CLOTHING AVERAGE ANNUAL SPEND / BOUGHT PAST 3 MONTHS

2021
2022
2023
2024

Clothing Average Spend P12m

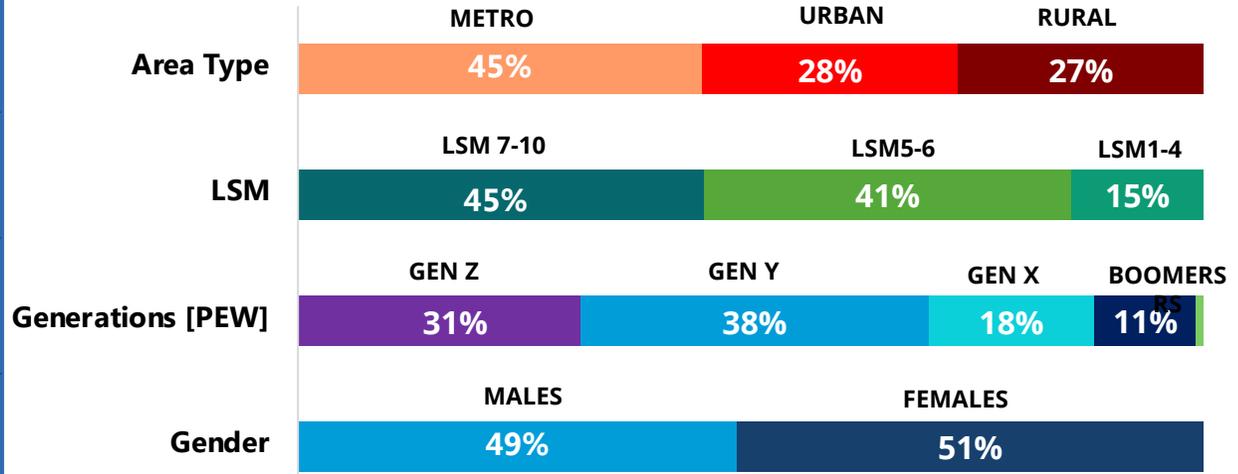


Clothing Bought P3M



-  **46%** bought fast food P4W
-  **R217** average spend on fast food on last restaurant visit.
-  **3** average party size on last restaurant outing.
-  **924K** use Fast Food delivery services.

Fast Food Purchases N=20 043 500

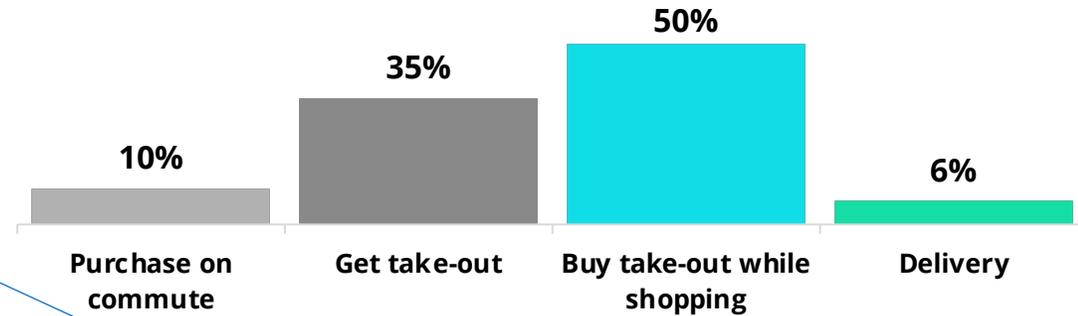


Most often used method to order food N=25 648 388



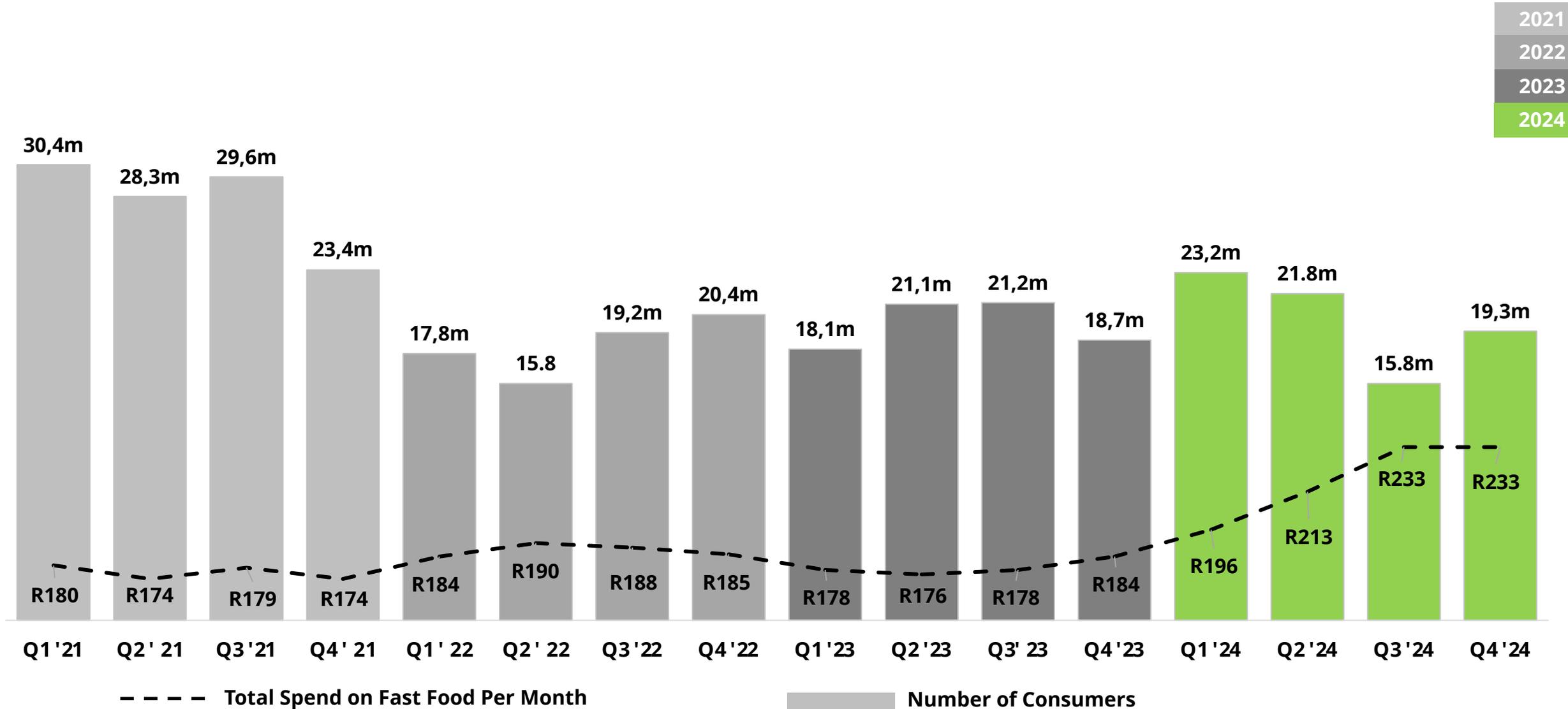
38% (P4W) order from Uber Eats

Buying behaviour N= 21 523 902

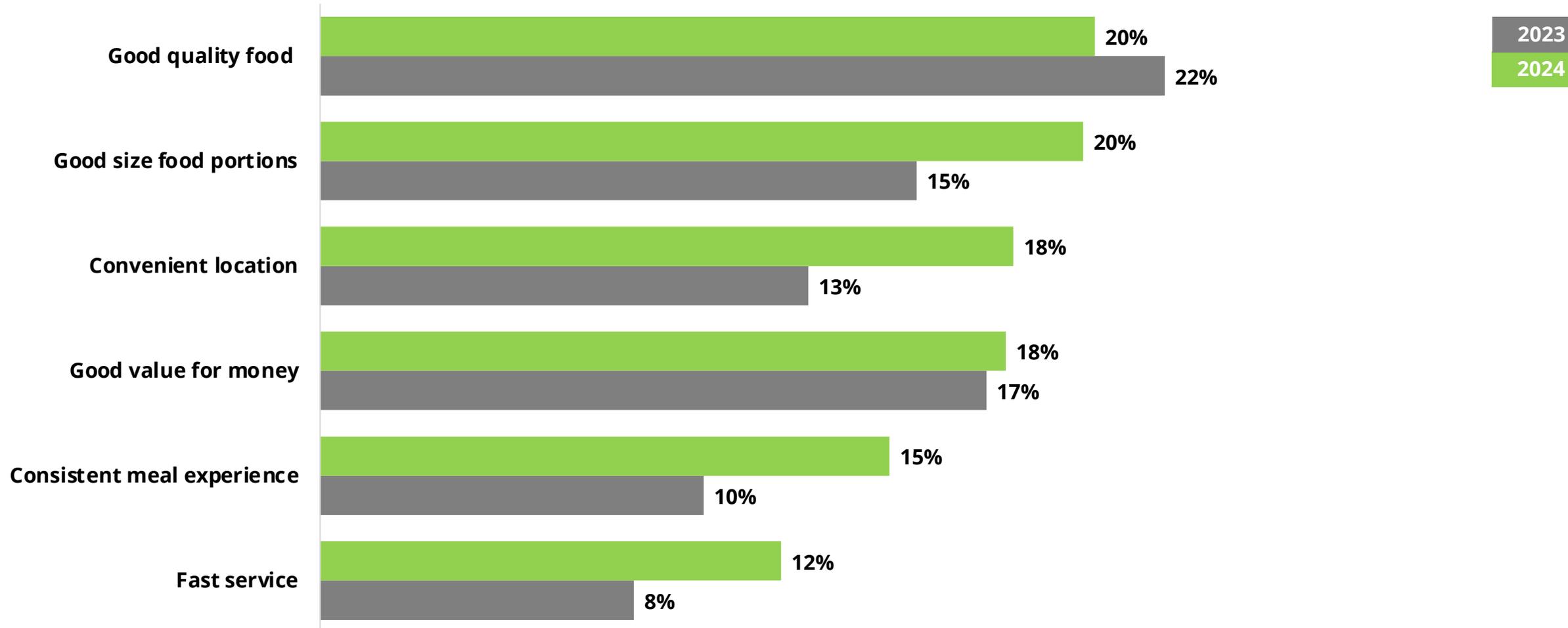


29% (P4W) order from Mr. D

FAST FOOD CONSUMPTION AND EXPENDITURE (LAST VISIT): QoQ

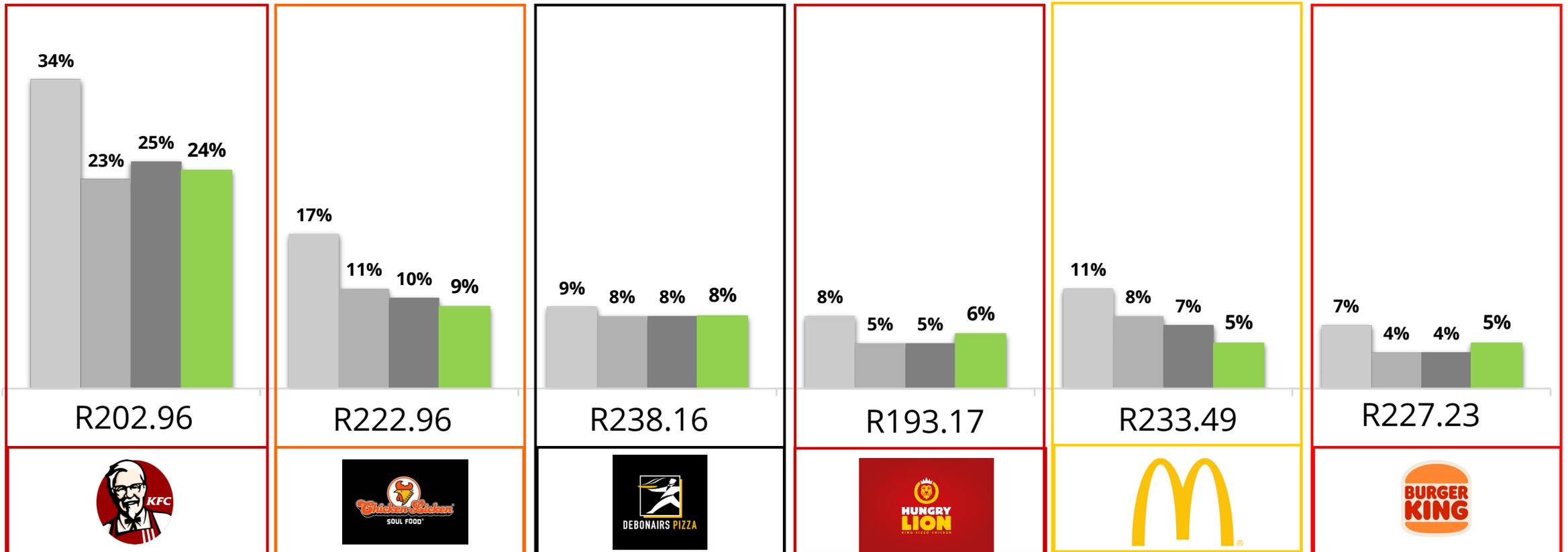


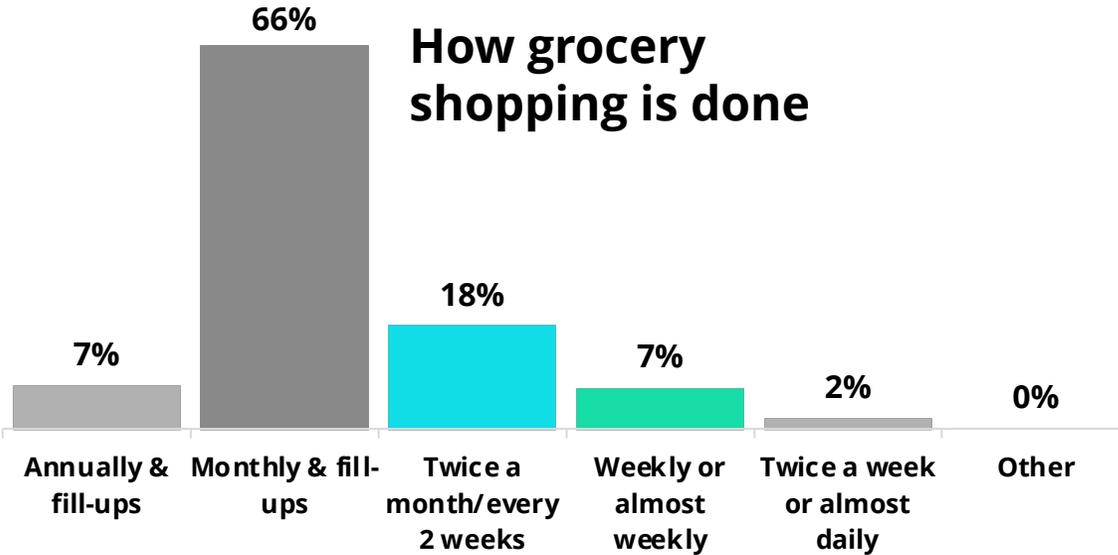
FAST FOOD: WHAT FACTORS INFLUENCE YOUR DECISION OF OUTLET



TOP 6 FAST FOOD BRANDS AND AVERAGE SPEND: YoY

2021
2022
2023
2024

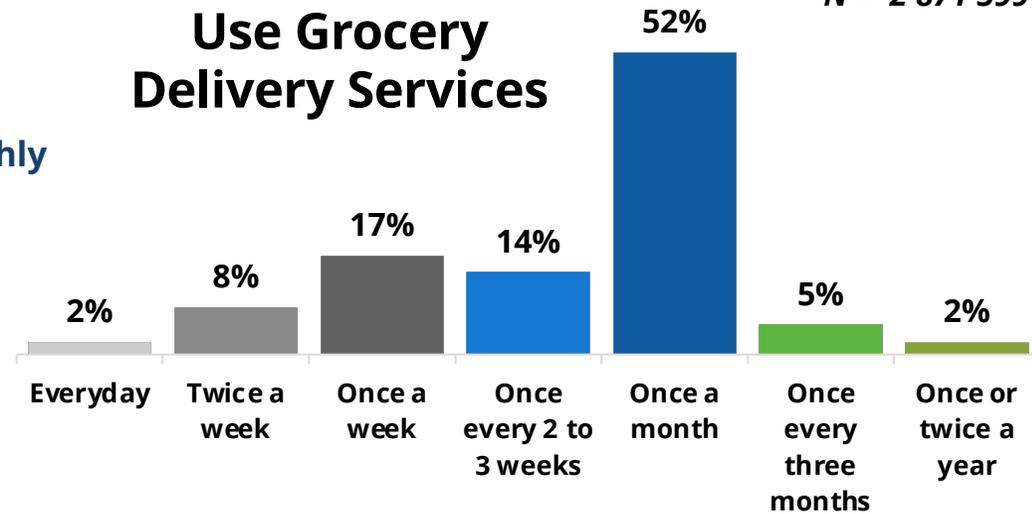




R2 070
average monthly spend on groceries.

How Often Do You Use Grocery Delivery Services

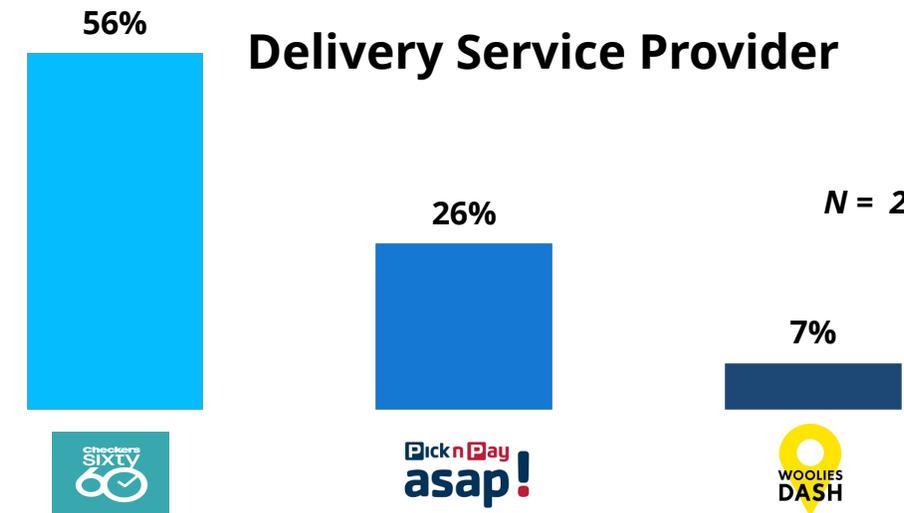
N = 2 871 599



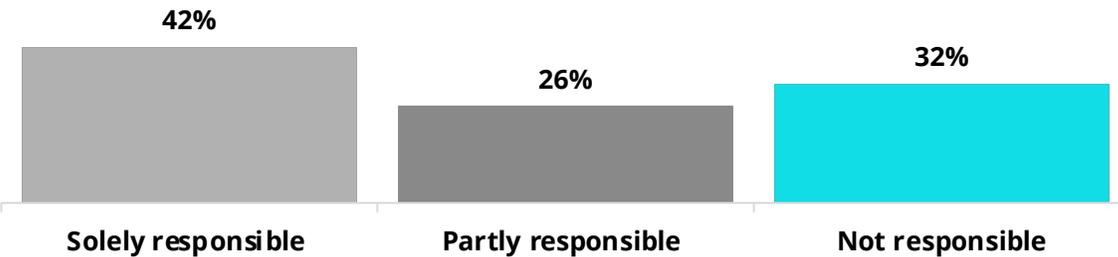
57% of the respondents usually do the grocery shopping themselves in their household.

Delivery Service Provider

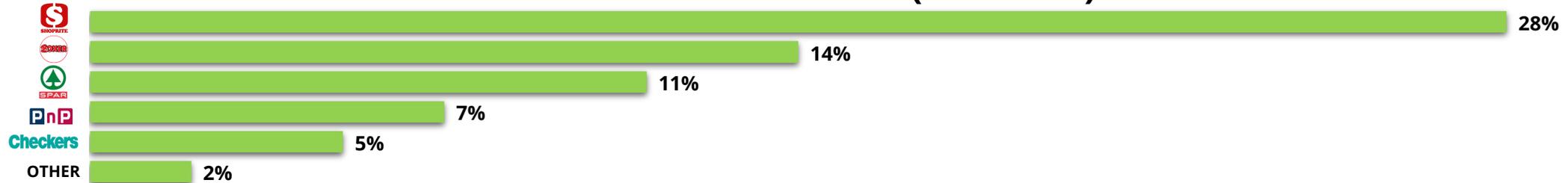
N = 2 873 123



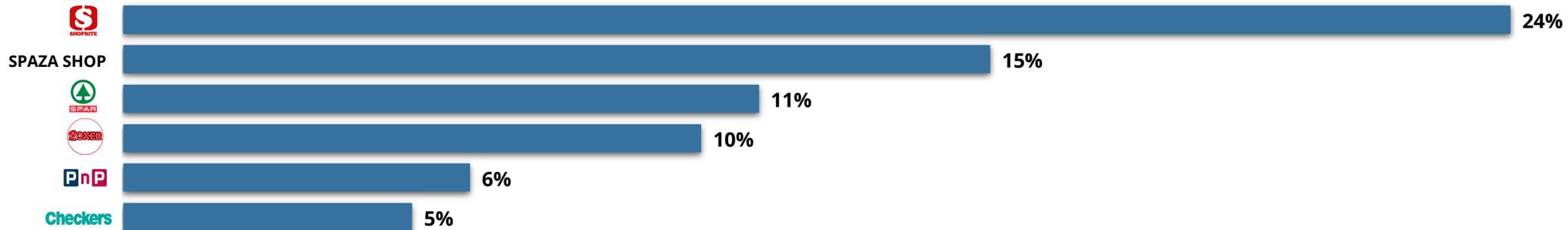
Household purchases responsibilities



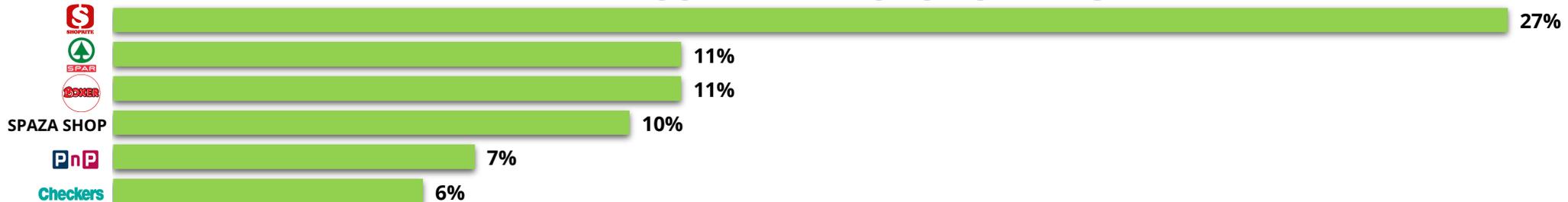
BULK SHOPPING (IN STORE)



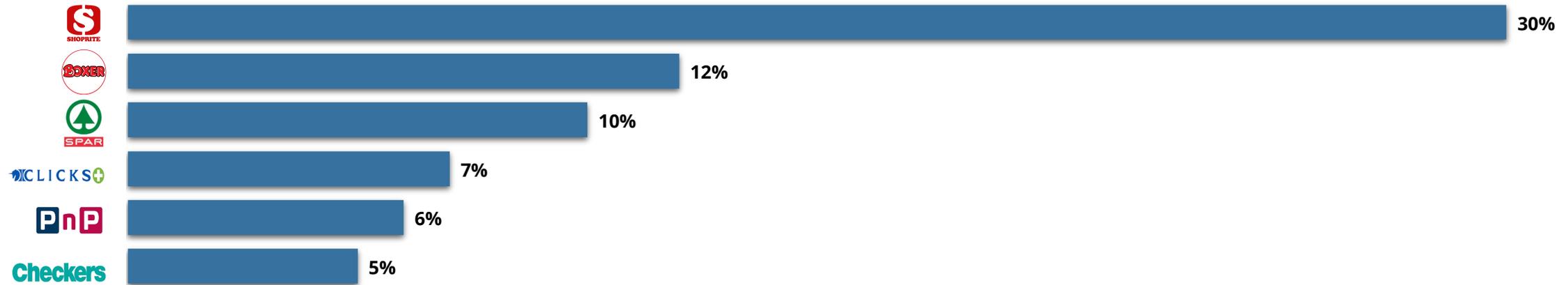
DAY TO DAY (IN STORE) GROCERIES



CONVENIENCE SHOPPING

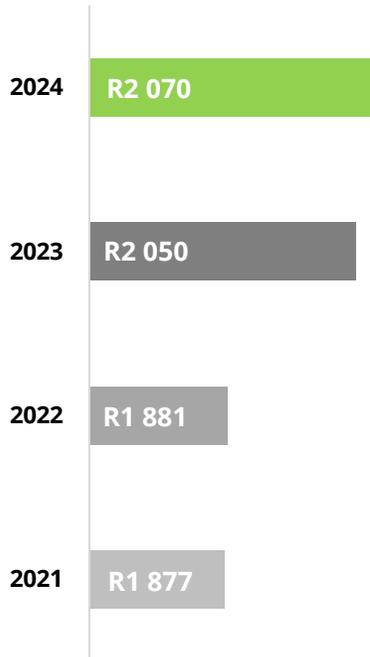


TOILETRIES (IN STORE)



GROCERIES AVERAGE SPEND / FOOD ITEMS BOUGHT

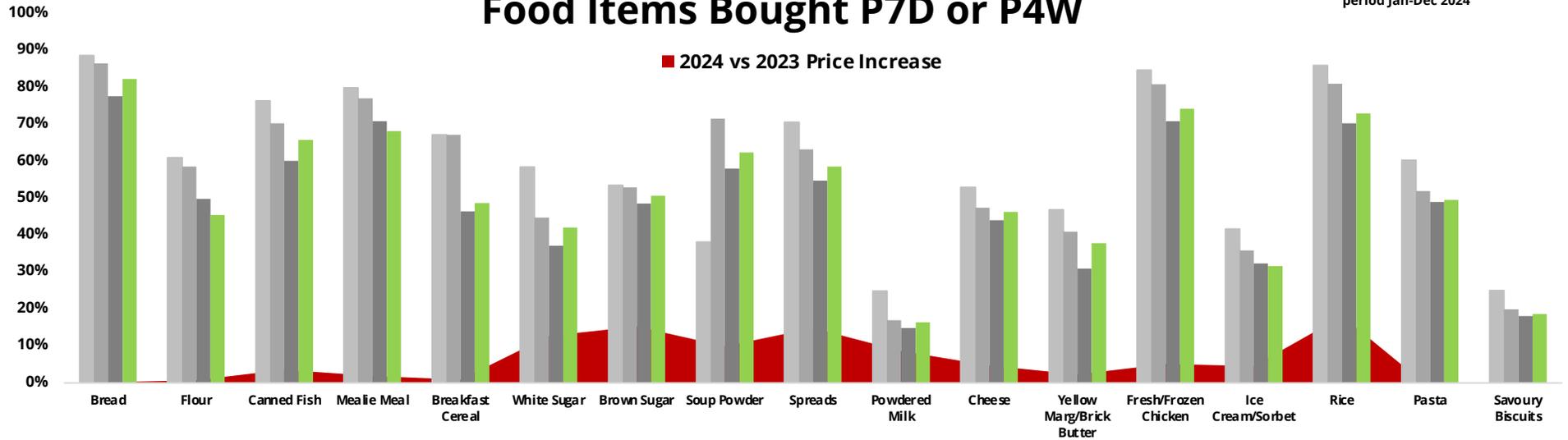
Average Grocery **only** Spend



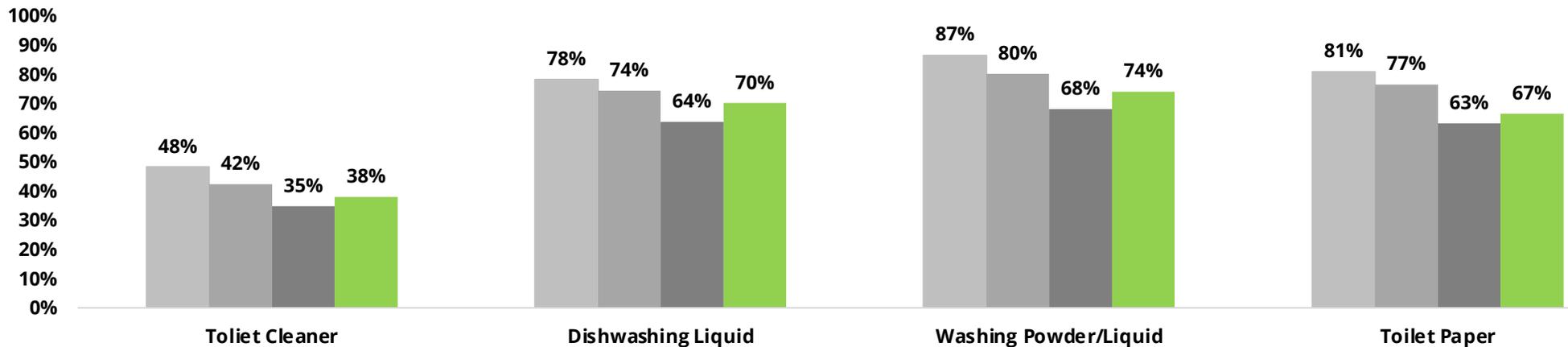
Price Increases sourced from STATS SA and averaged for the period Jan-Dec 2024



Food Items Bought P7D or P4W

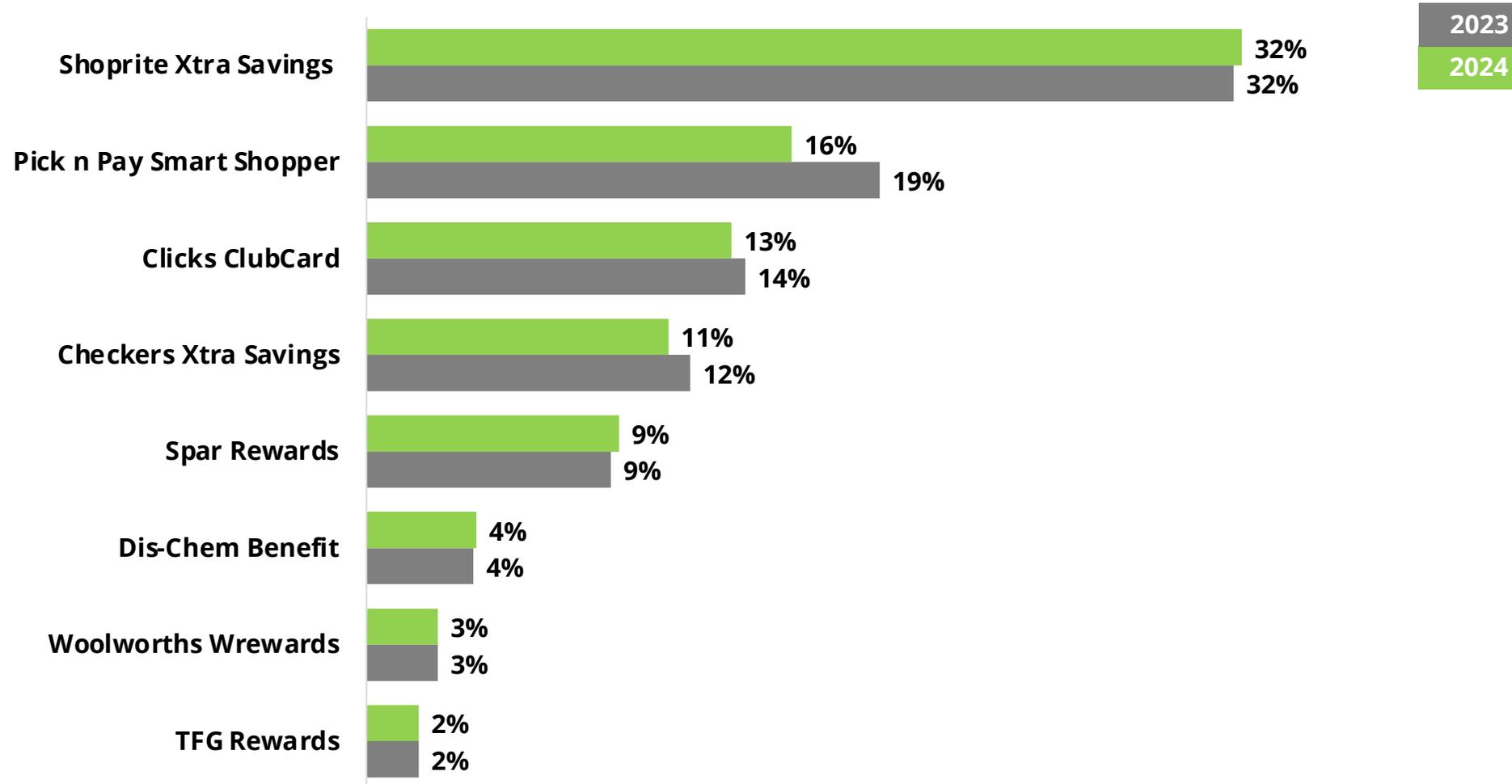


Household Goods Bought P4W



48% of the population have a store loyalty or rewards card

Top 8 Loyalty/Rewards Cards





R411 average monthly spend on alcoholic beverages

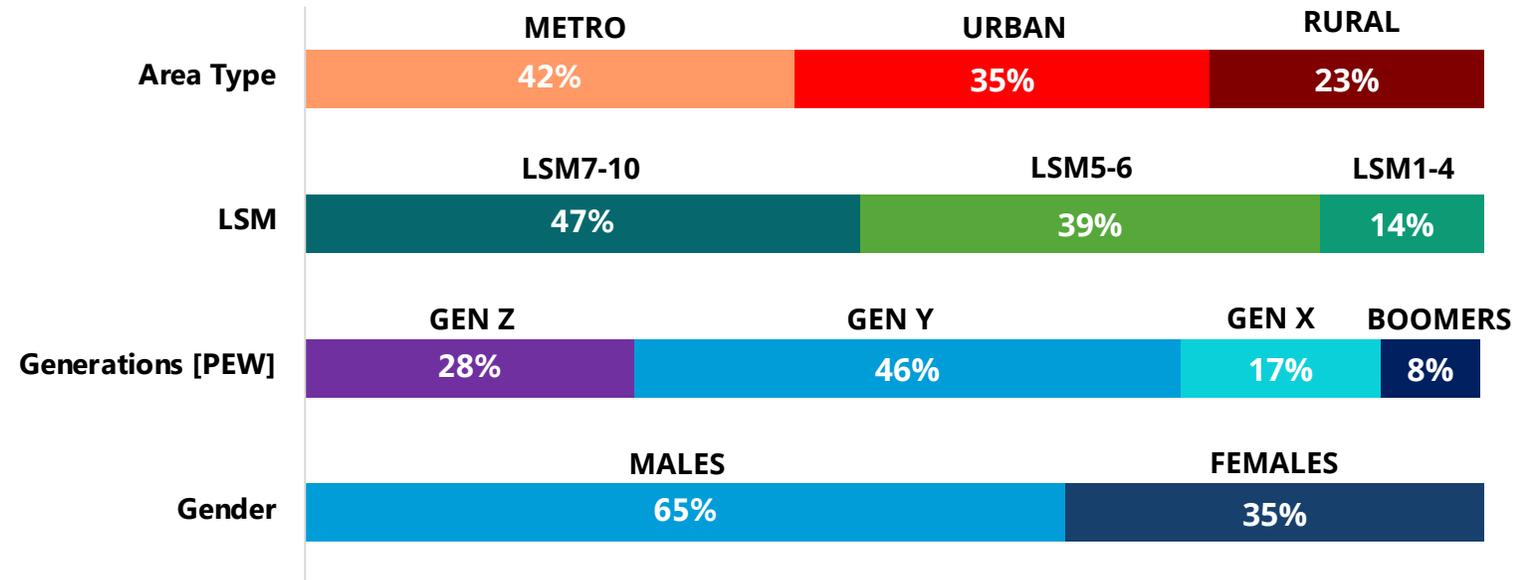


23% bought liquor in P7D

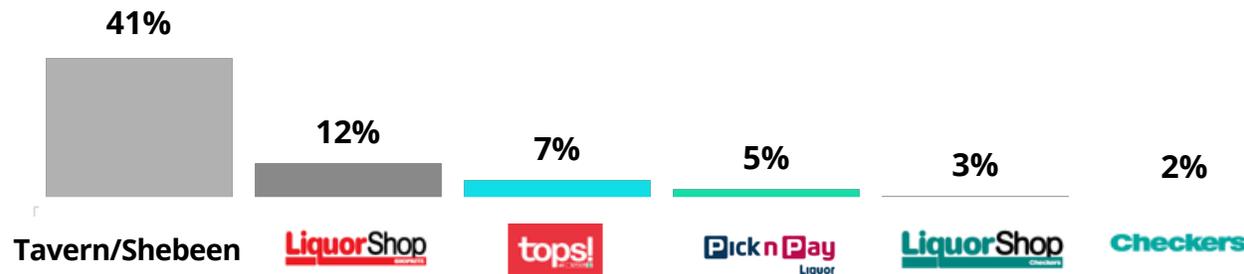


13% bought liquor in P7D from a tavern/shebeen

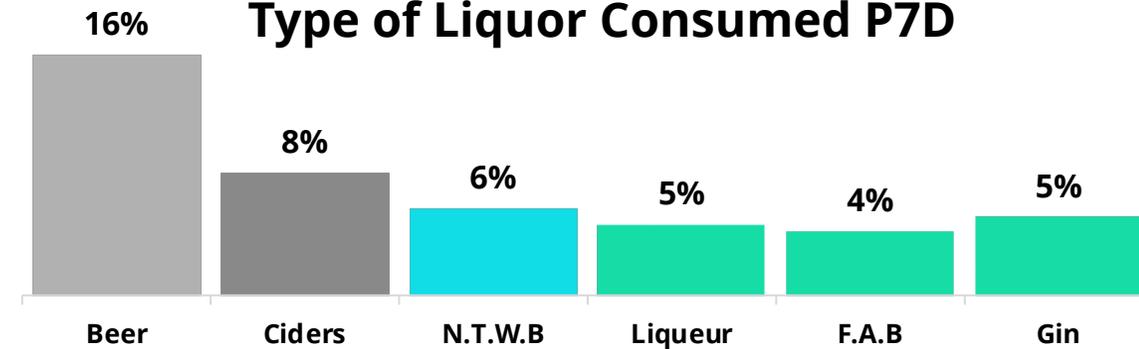
Bought Alcohol P7D Population Distribution



Top Liquor Outlets P7D

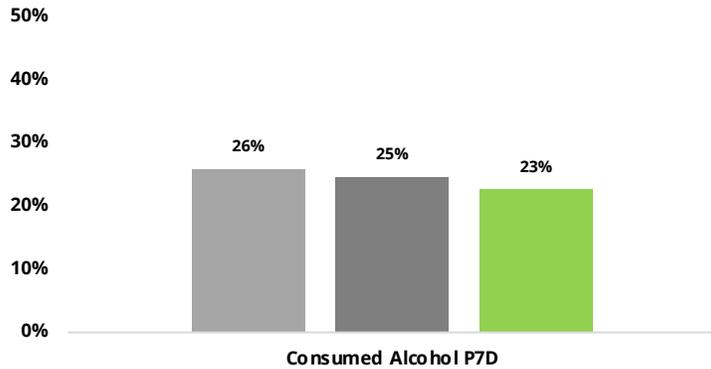


Type of Liquor Consumed P7D

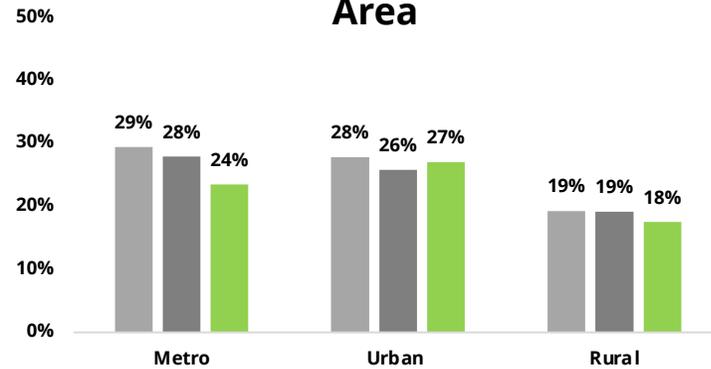


ALCOHOL CONSUMPTION PAST 7 DAYS

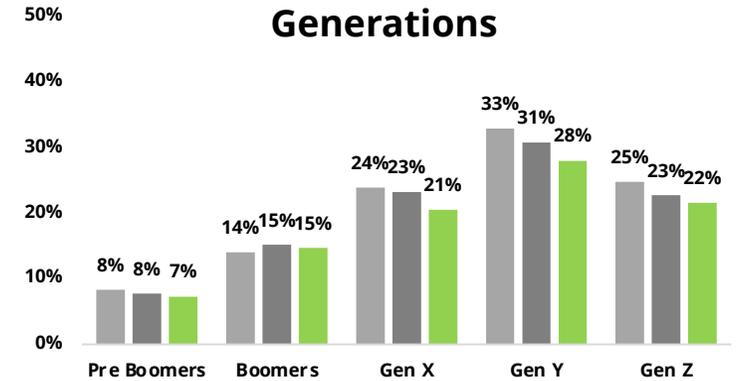
Consumed Alcohol P7D



Consumed Alcohol P7D Area

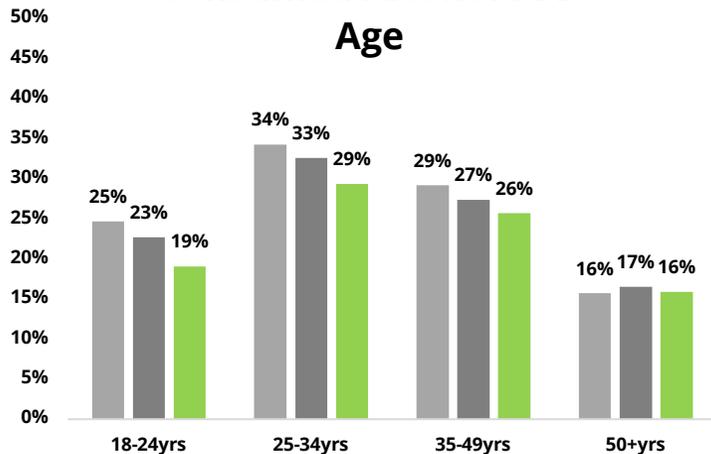


Consumed Alcohol P7D Generations

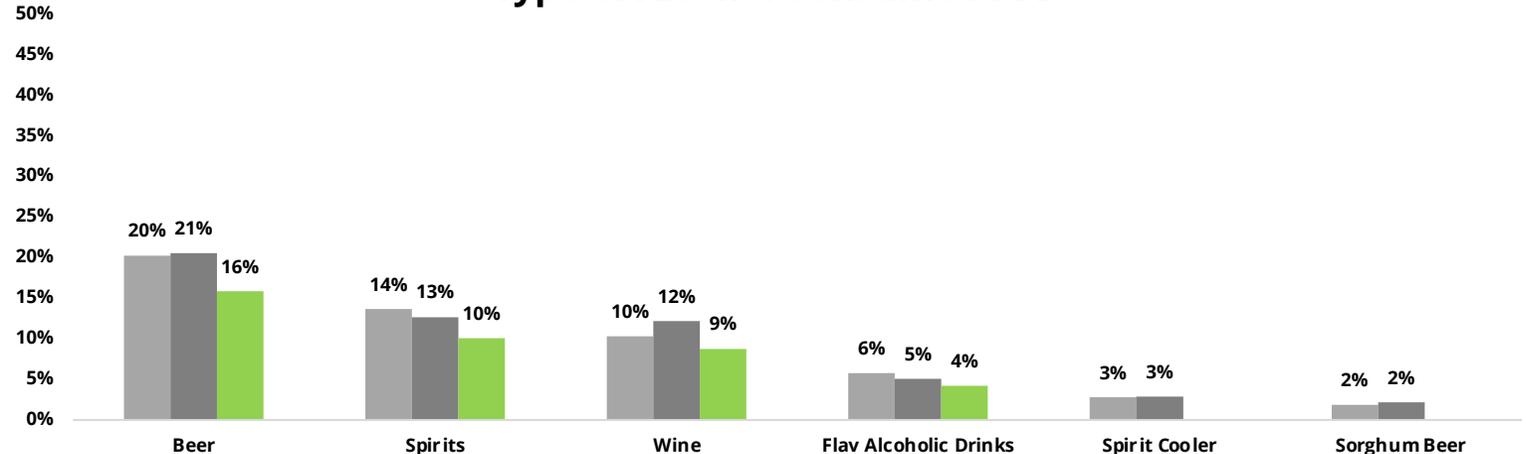


2022
2023
2024

Consumed Alcohol P7D Age



Type of Alcohol Consumed P7D





R2081 average monthly spend on fuel



45% have a tracking device



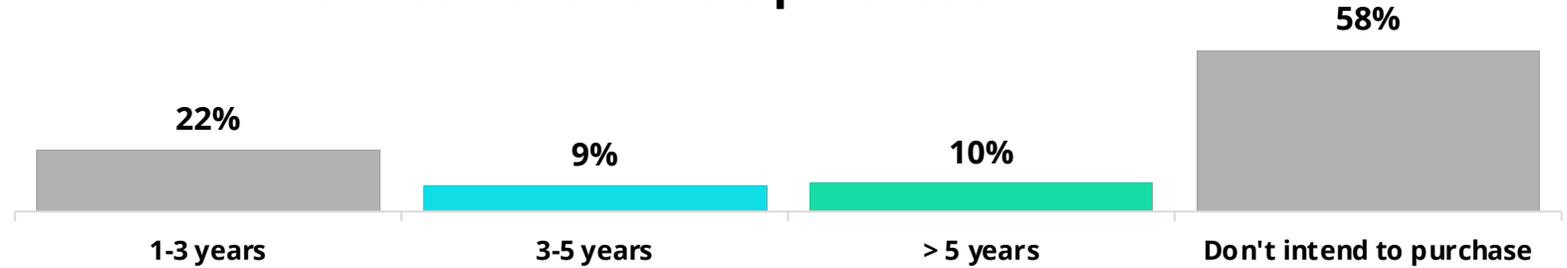
R5511 average instalment price



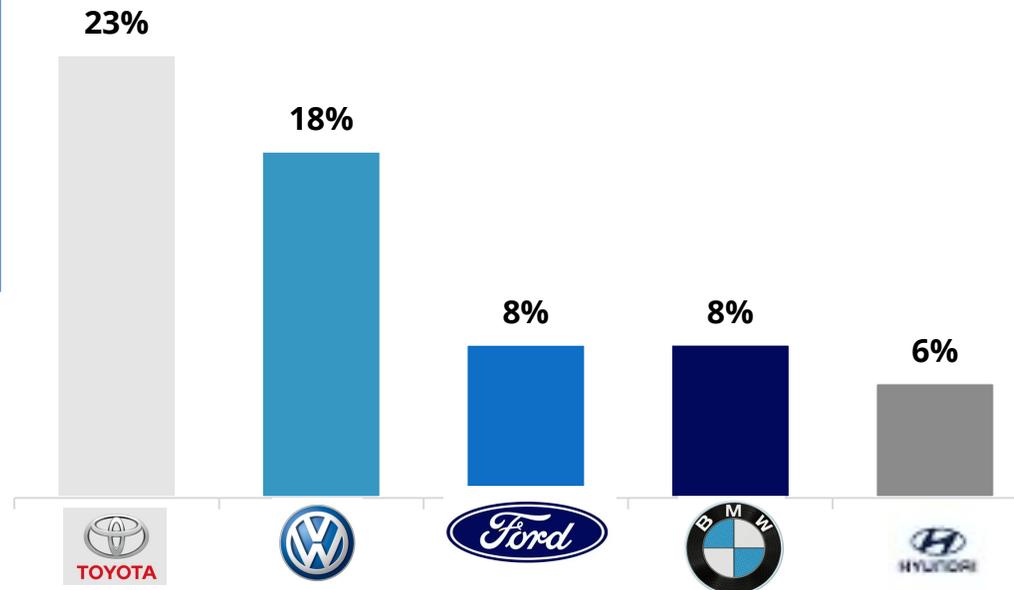
59% people purchased second-hand vehicle

38% of drivers personally own a vehicle

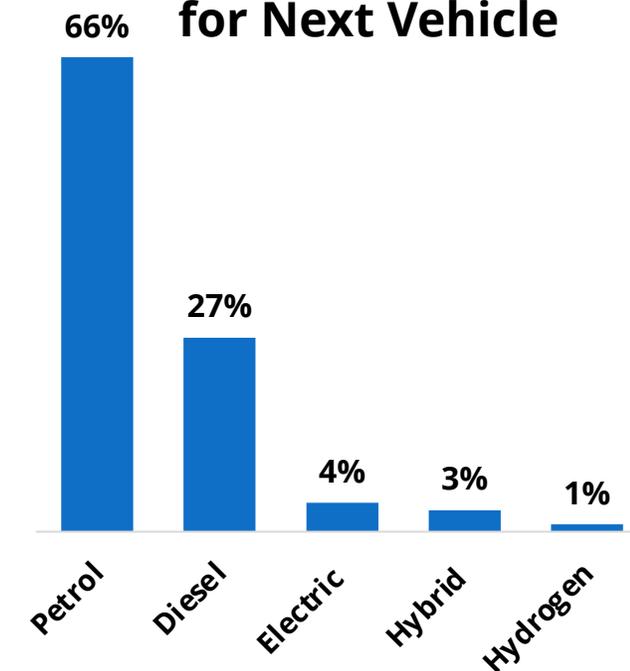
Intended next vehicle purchase



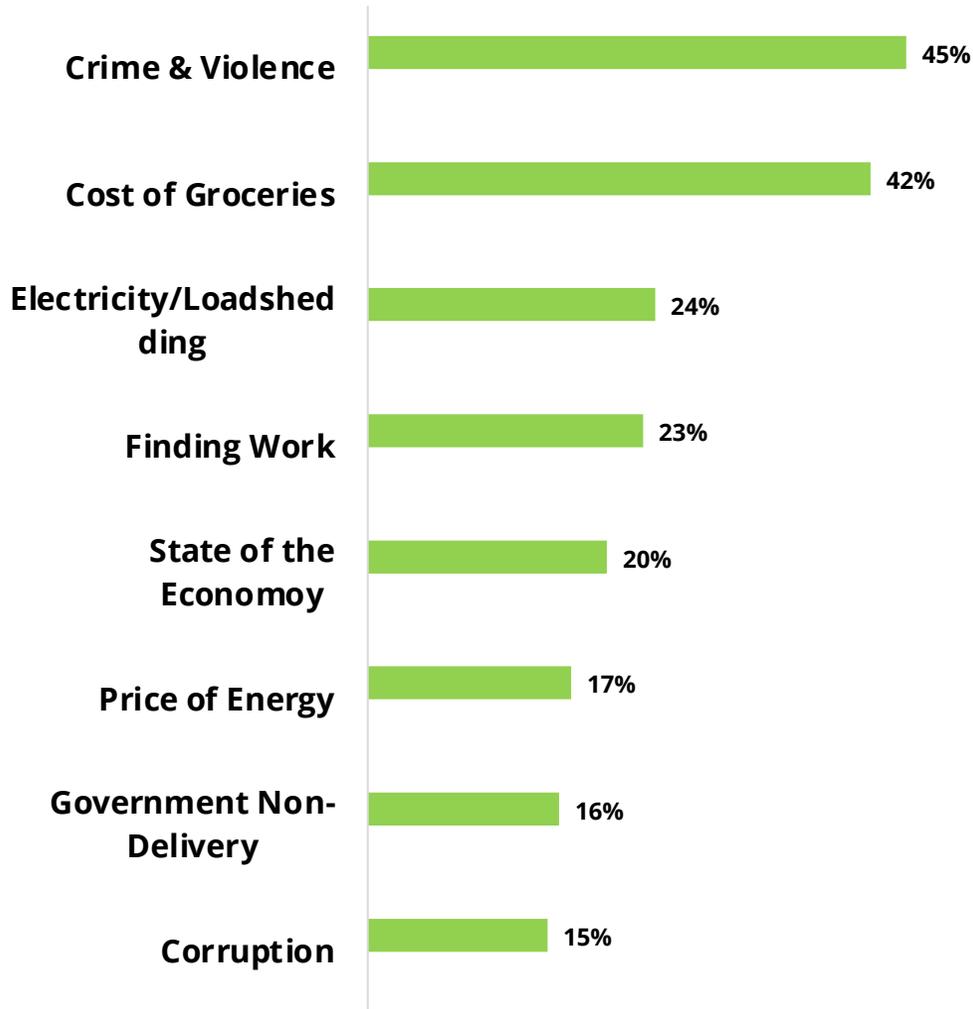
Most Common Vehicle Brands Driven



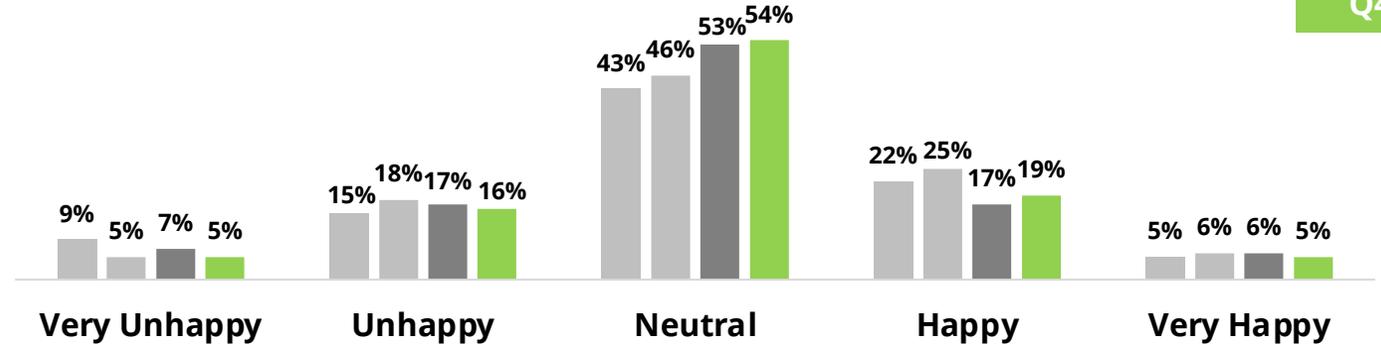
Preferred Fuel Type for Next Vehicle



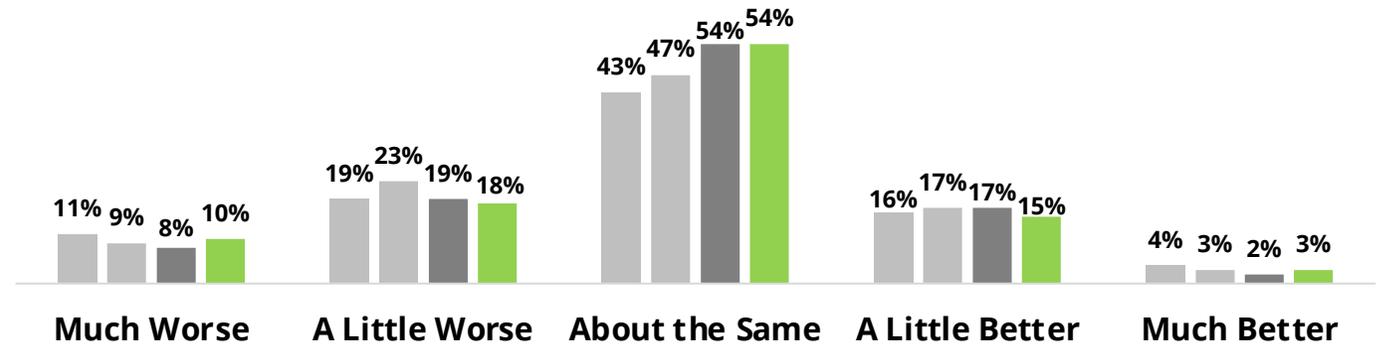
Current Worries



How Happy with Life and Current Circumstances



Personal Finances Versus a Year Ago



Thank you.



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RESEARCH



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

mrf@mrfsa.co.za

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

[\(mrfsa.org.za\)](http://mrfsa.org.za)

nubiz@plus94.co.za

[Plus94 Research](http://Plus94Research.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.

DATA COLLECTION INSTRUMENTS

- Face-to-face questionnaires consisting of 414 questions and covering 2 155 non-fast moving consumer goods brands,
- Leave-behind diaries
 - Total Questions = 411
 - Behaviour questions = 136
 - Non FMCG Brands = 380
 - FMCG Questions = 344
 - FMCG Categories = 153
 - FMCG Brands = 2 655



ANNUAL RESEARCH SAMPLE

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

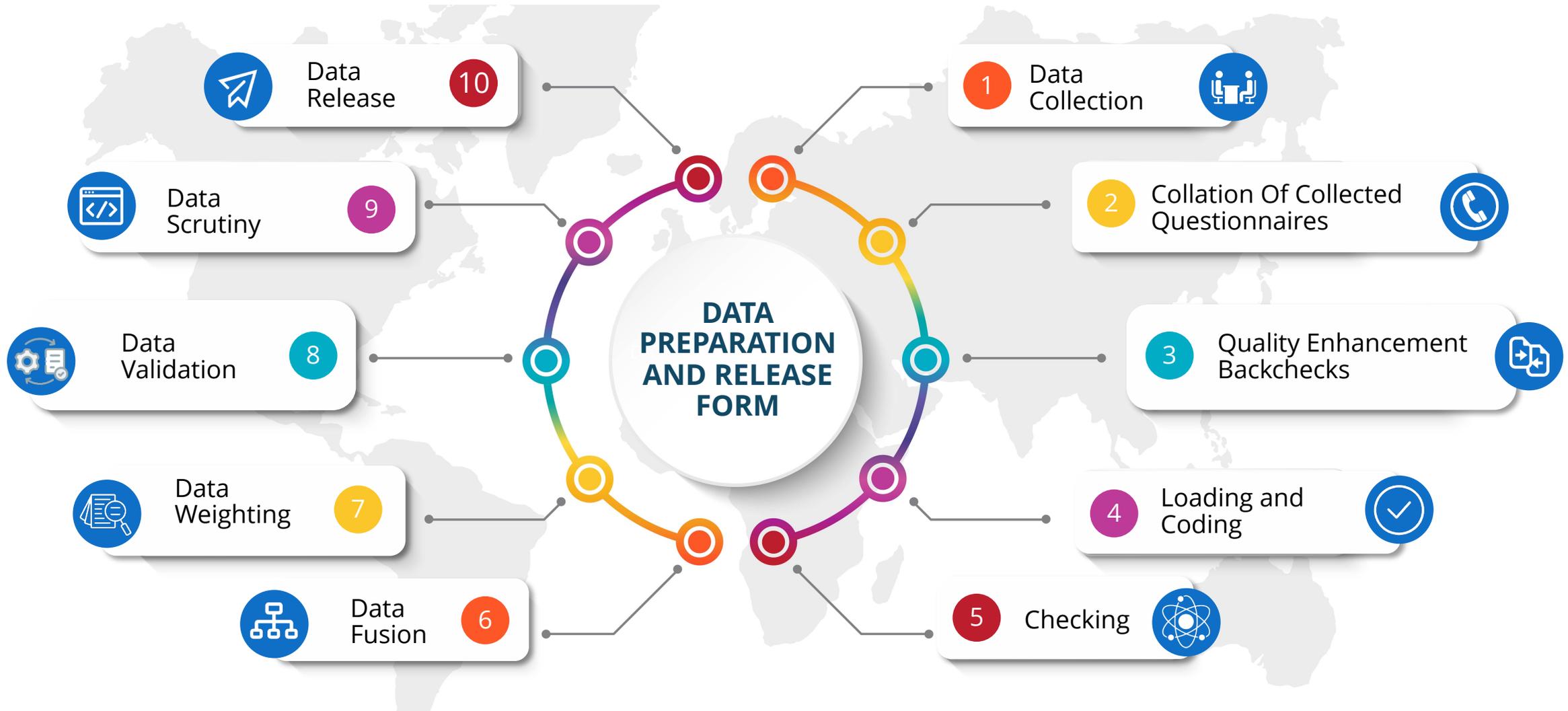
INTERVIEW DETAILS

- 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

DATA PREPARATION AND RELEASE FORM



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.