



MARKETING RESEARCH
FOUNDATION

MAPS DATA OVERVIEW: **WAVE 1**

PLUS 94
RESEARCH

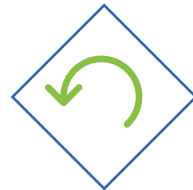


Important Definitions



Wave

Each wave is made up of a period of 6 successive calendar months. Two waves will yield an annual sample of 20 004.



Cycle

A cycle (i.e. a quarter) is a continuous period of 3 months.



Dip

A dip is a monthly survey of 1667 by 12 equals 20004 interviews. Three dips make a cycle of 5001 interviews, and 2 cycles make a Wave of 10 002 interviews.

Data Disclaimer

This was the first wave of MAPS fieldwork conducted and a sample of 10 024 face-to-face interviews and 5 079 leave behind questionnaires (diaries) were administered.

The implementation of a national lockdown in response to COVID-19 affected the first wave of the MAPS project. Under lockdown level 5, face-to-face interviews had to be halted and could only continue once the hard lockdown was lifted. There is no doubt that the different phases of lockdown that the country went through have changed and had a profound impact on the behavioural dynamics of consumers. As a result, the data collected during Wave 1 needs to be prefaced with the fact that it was gathered under the environment of COVID-19.



Data Disclaimer

This could have impacted the insights in the following sections:

Media Consumption

- 
- 
- Newspapers
 - Magazines
 - Television
 - Radio
 - Social Media

Activities Outside the Home

- 
- 
- Transport
 - Mall and Cinema visits

Household and Personal Income

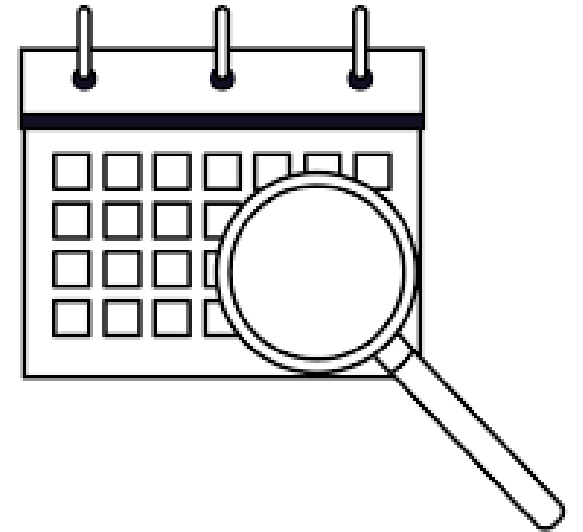
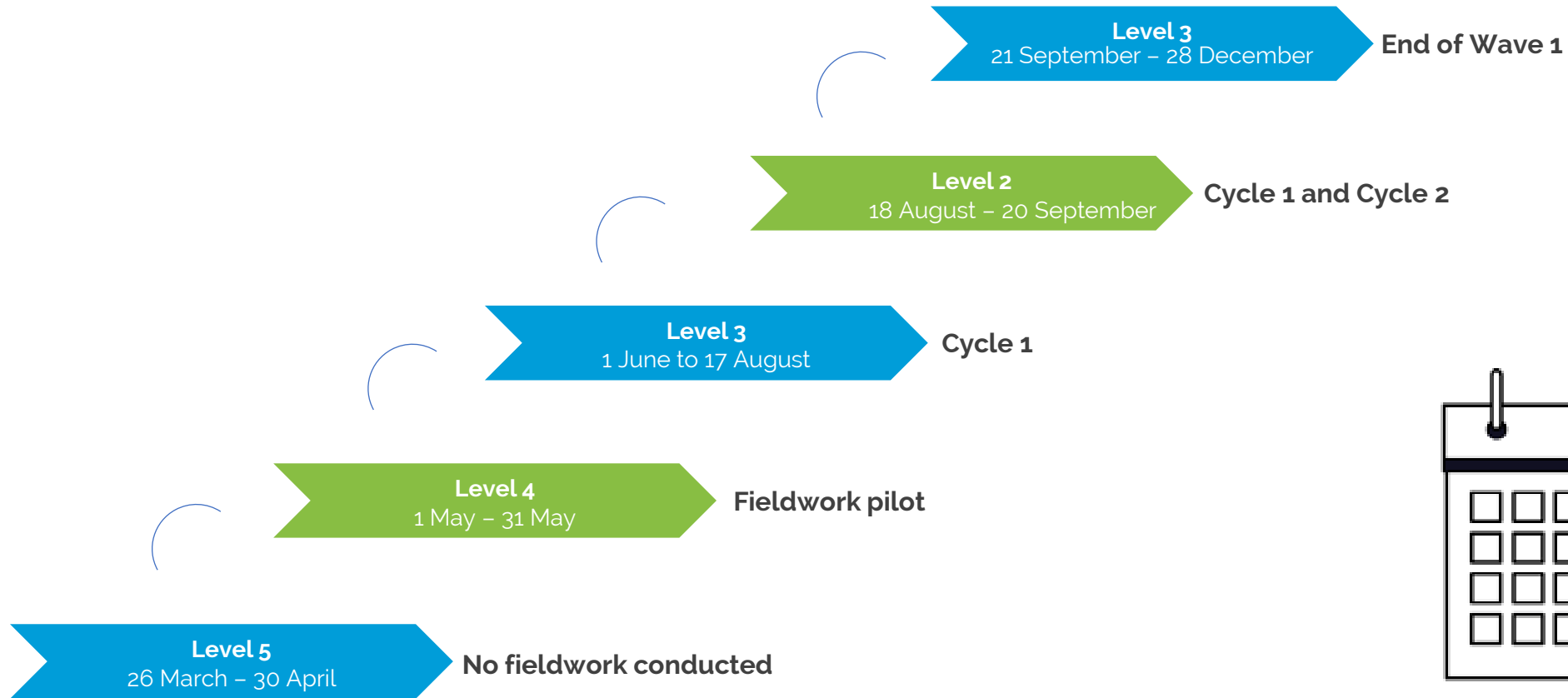


Retail Purchases

- 
- 
- Groceries
 - Toiletries
 - Liquor
 - Cosmetics
 - Appliances
- 
- 



COVID-19 Timeline



Research Universe & Methodology

Universe:

Age: **15 years and older**
 Gender: **Males and females**
 Race: **All racial groups**
 Area: **National, all 9 provinces**

Target: **10 002 face-to-face interviews & 5000 diaries**

Achieved sample: **10 024 face-to-face interviews & 5 079 diaries**

Two research instruments were used for the MAPS study:

- ❖ face-to-face questionnaire
- ❖ the leave behind questionnaire (diary).

The average interview length is between 45 and 60 minutes to complete. Respondents were given between 3 and 5 days to complete the diary.

Type of research: **Quantitative**

Interviewing method: **Tablet-Assisted Personal Interviewing (TAPI) for the face-to-face questionnaire**
Self-administered paper & pencil and online interviews for the leave behind questionnaire

The **data fusion** technique was considered for half of the sample that did not fill in leave behind questionnaires.





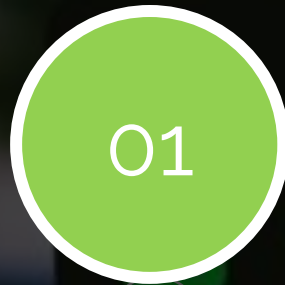
Sampling Design

In each dip, 209 scientifically selected Enumeration Areas (EAs) were chosen to represent the population. In each EA, 8 interviews were conducted at preidentified points.

This resulted in an average of 1 672 interviews being conducted in each dip, totalling 10 024 interviews and 5 079 diaries.

Weighting

The calculation of the design weight took the three sampling stages into account.



The weight of an EA is given by the inverse of the selection probability of an EA to be selected.



The household weight per EA is given by probability (change) that a household will be selected, given the EA is selected.

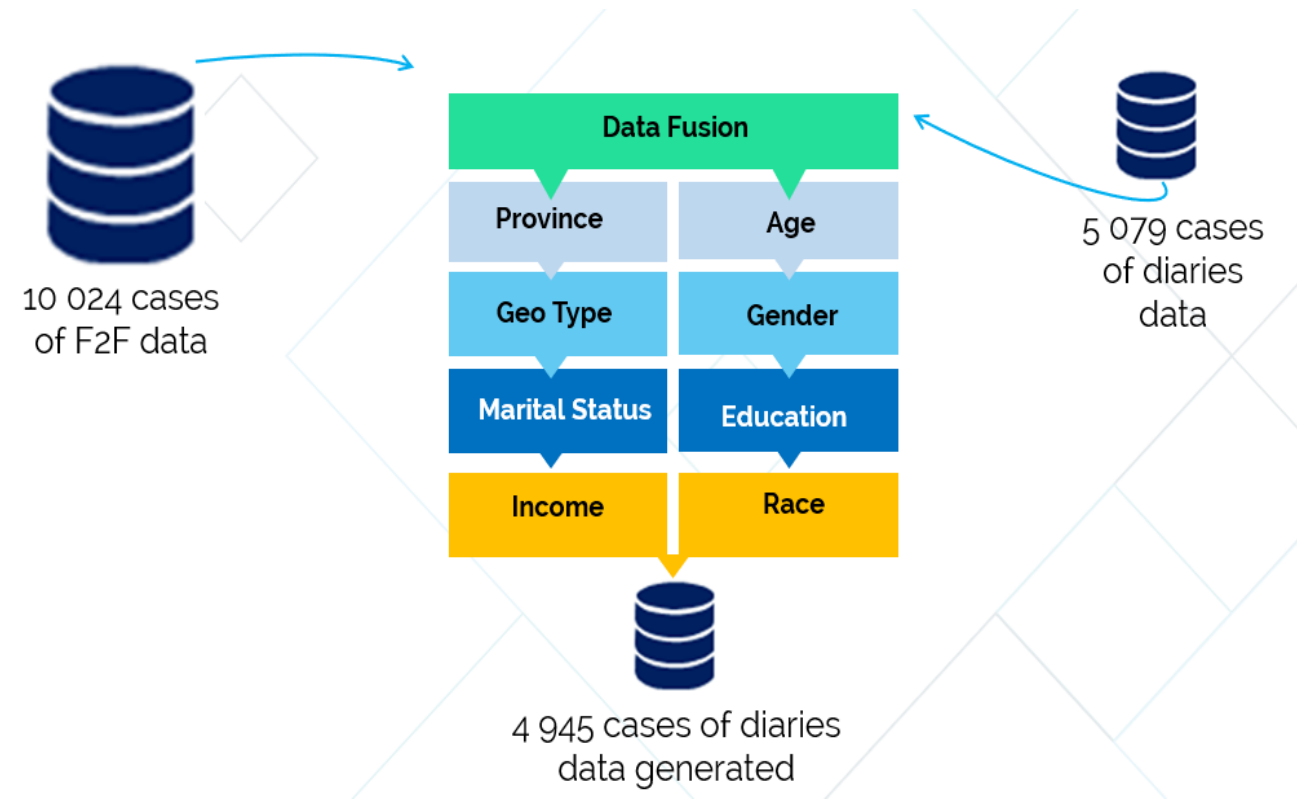


The respondent weight is linked to the average number of persons aged 15 years and older in the selected households.

A product of the above three weights becomes the weight that is assigned per each respondent.

Data Fusion

- 10 024 respondents completed a face-to-face questionnaire. Half were expected to complete the leave behind questionnaire.
- 5 079 respondents successfully completed the diaries.
- For the remaining respondents who did not complete the diaries, data was obtained through integrating the face-to-face interviews data with the leave behind questionnaire data.
- Several hooks were considered in fusing data including behavioural and demographic variables.





HEALTH CHECK



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RESEARCH



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Household Substitutions

Overall
Substitution
rate **14%**

Substitutions required due to:

- Refusals
- House inaccessible
- Nobody home after 2 call-backs
- EA inaccessible

Backchecks

25%
MAPS

15%
Industry

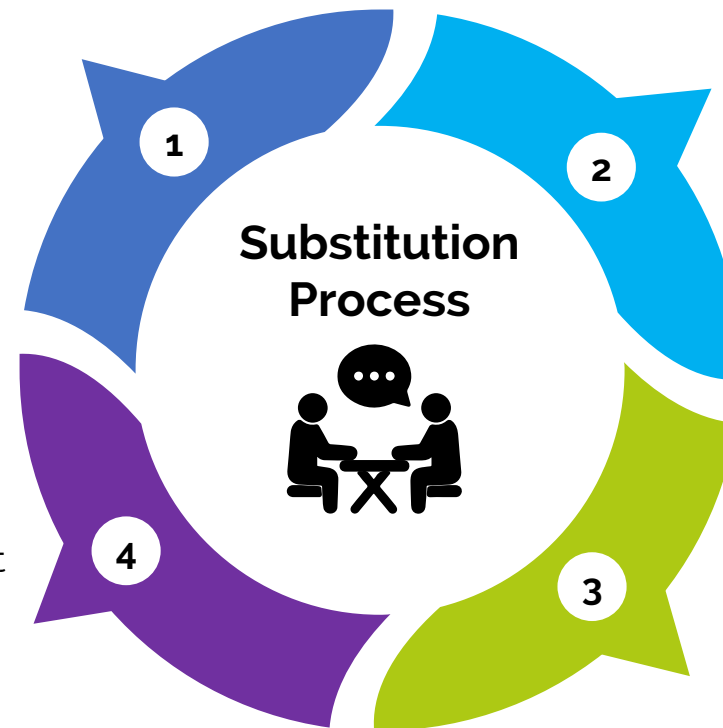


Identification of replacement points

- On each EA map 8 primary and 4 substitution points are preidentified
- Extra EAs are sampled to be used as substitution EAs

Impact of replacements

- All household replacement points are selected like for like
- All EA replacement points are selected like for like
- Replacements are chosen so as not to deviate from the initial sampling plan



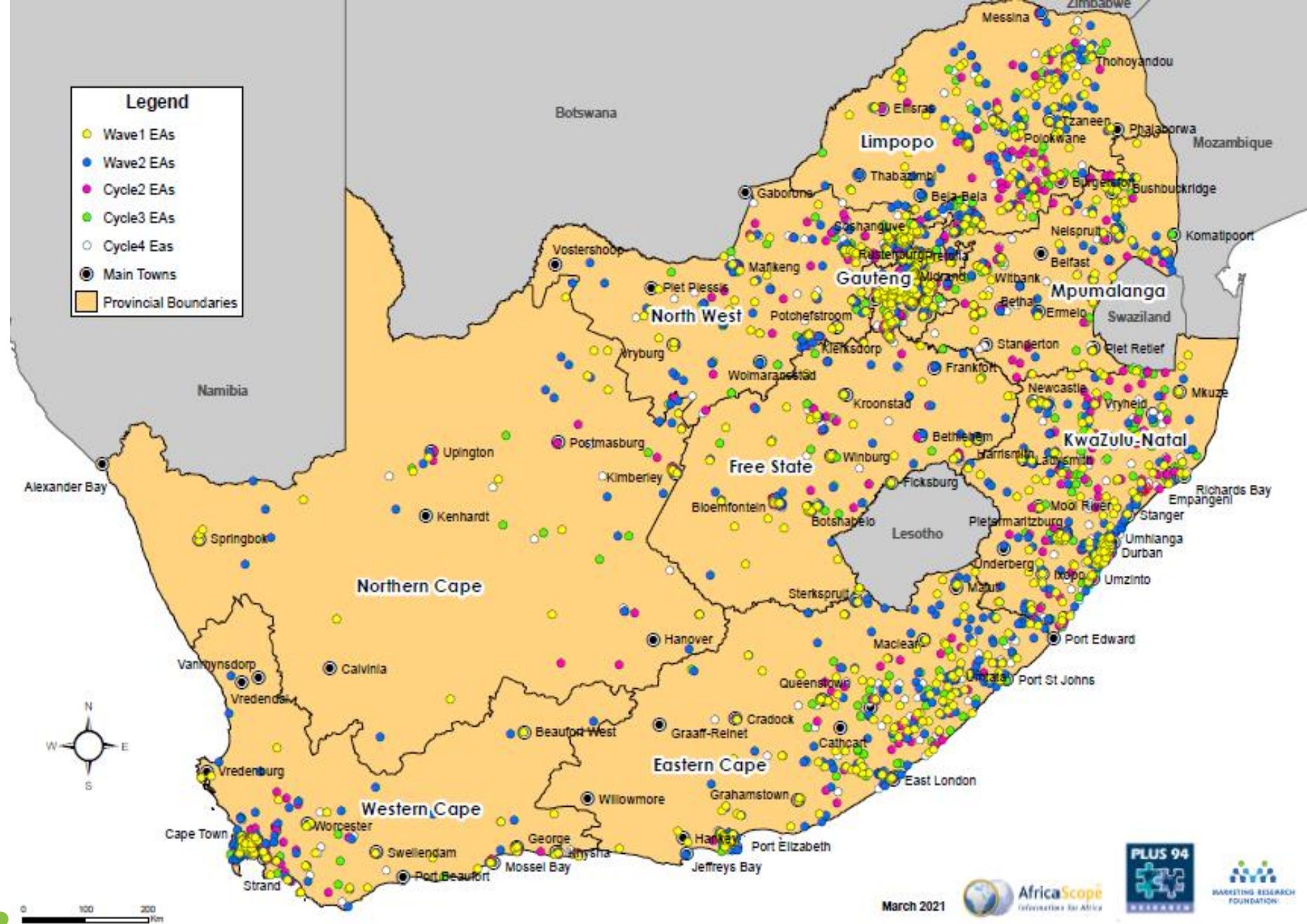
Need for substitution

- Refusal to participate
- House inaccessible
- No body at the dwelling
- Denied access to gated residences

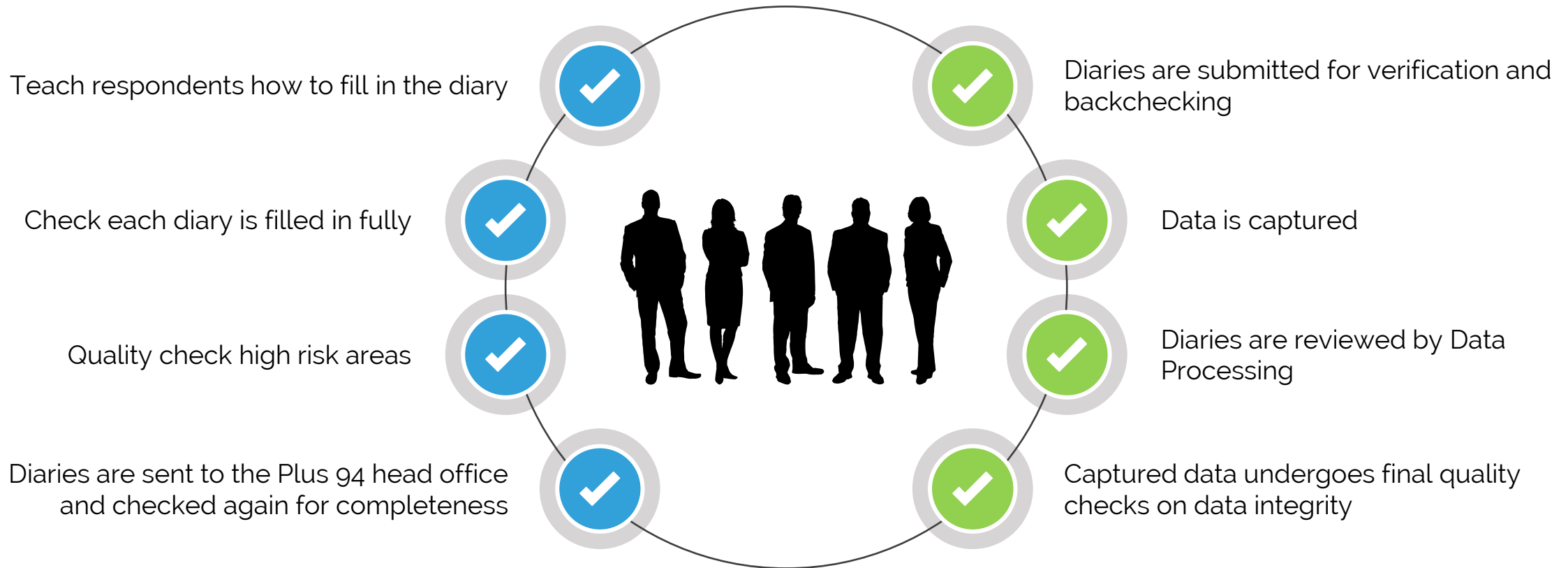
Authorisation to replace

- The need to replace is confirmed by a supervisor
- Substitution points in the EA are then used.
- Where the whole EA needs to be replaced, the project manager provides the EAs

Dwellings Visited: AfricaScope



Field Quality Control



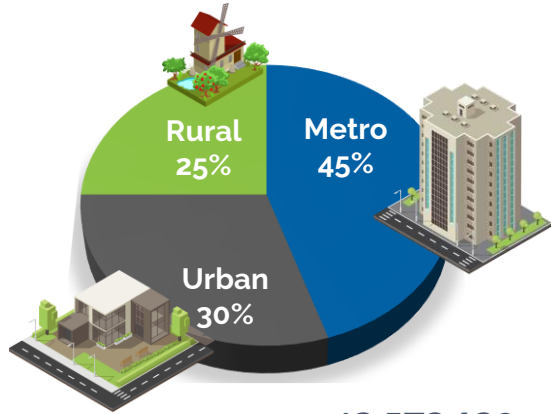


DEMOGRAPHICS

Demographic Profile

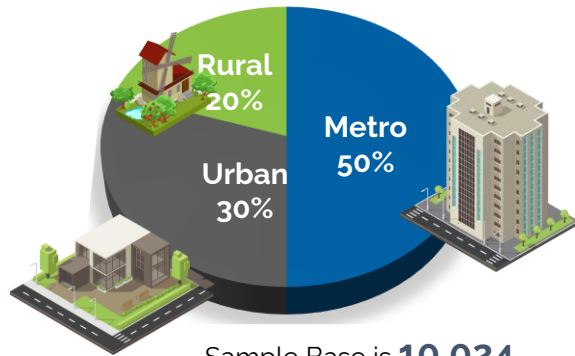
Base population 15+ years old is **42 573 129**

Weighted: Area Distribution



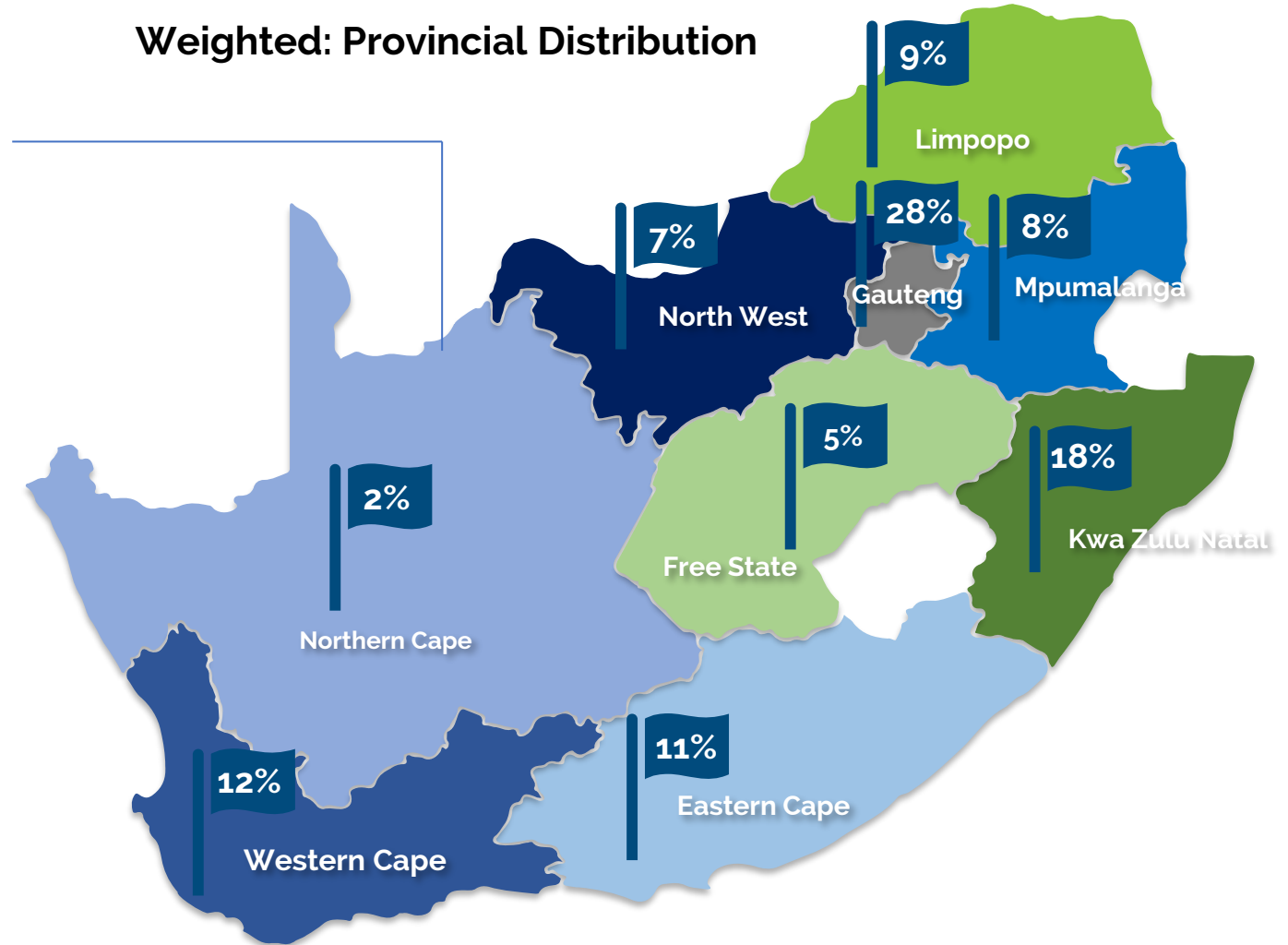
Population Base is **42 573 129**

Unweighted: Area Distribution



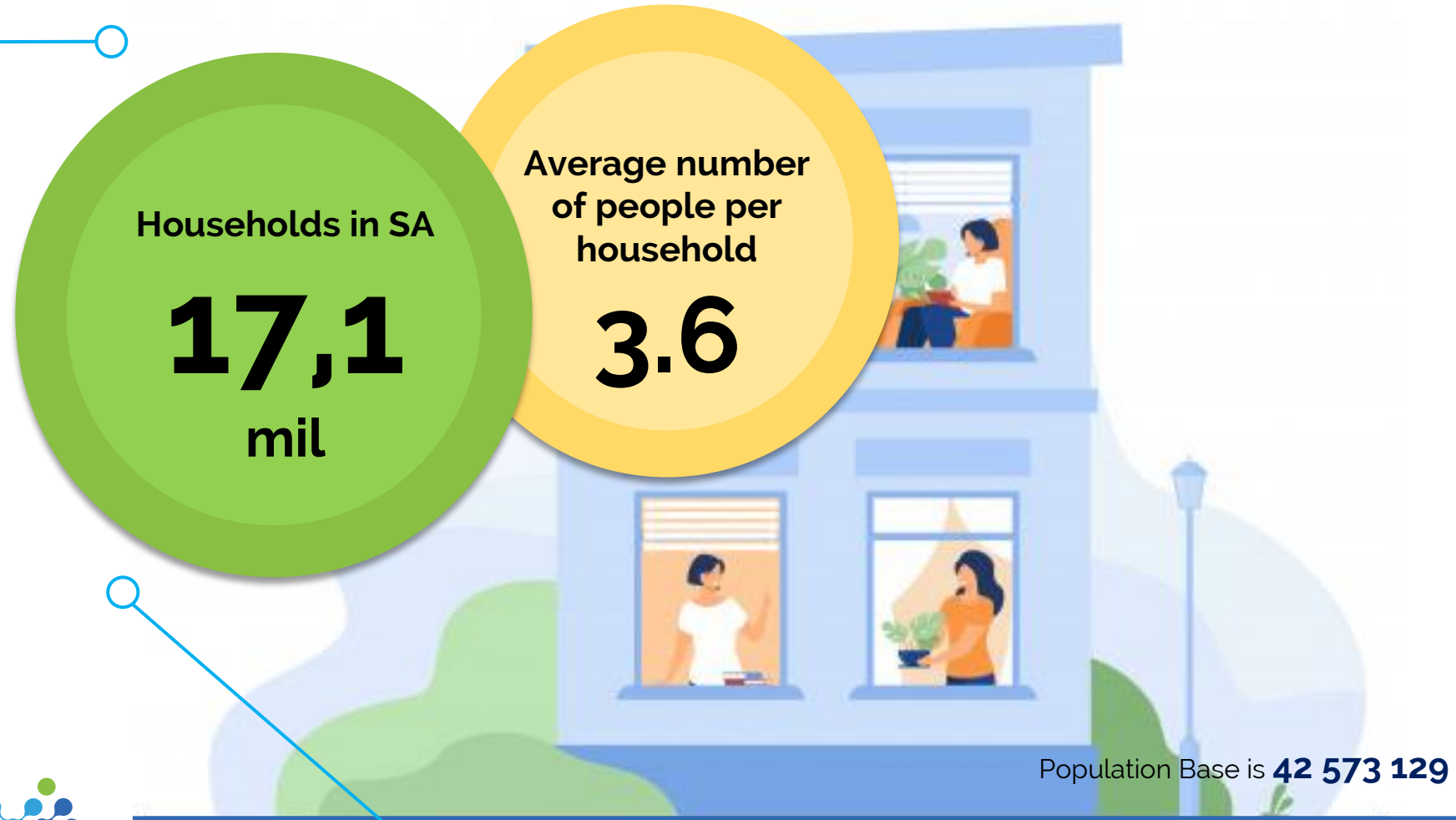
Sample Base is **10 024**

Weighted: Provincial Distribution



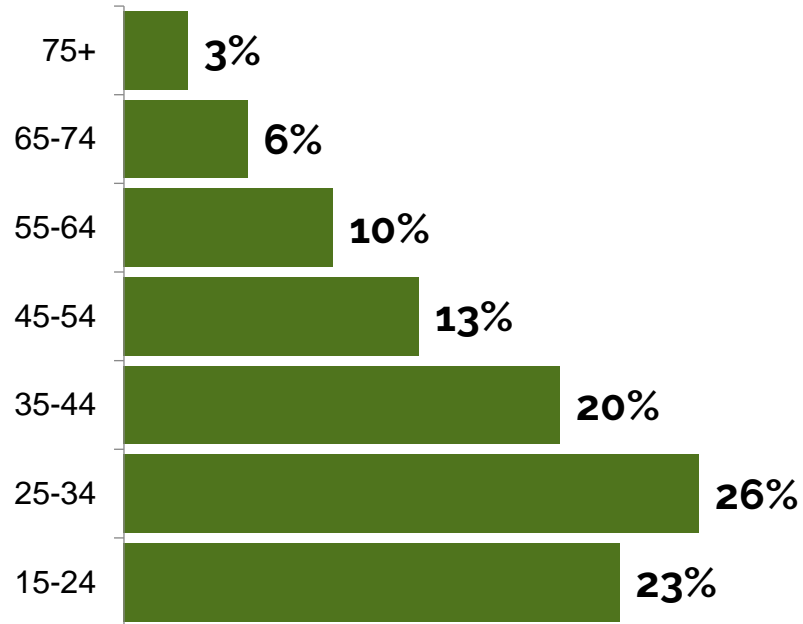
Demographic Profile

Average Household in South Africa



Demographic Profile

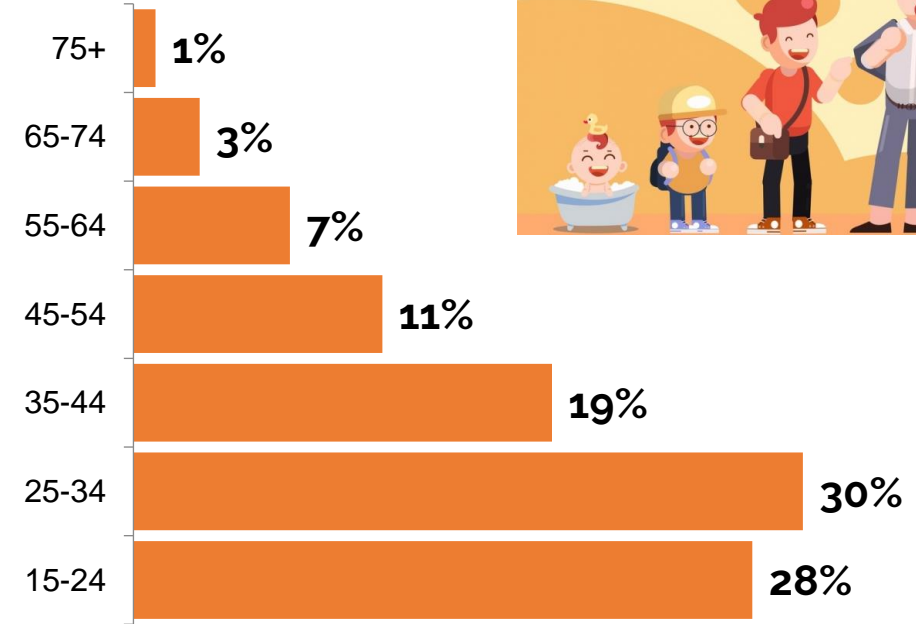
Weighted data: Age



Average age of respondents is **38 years**

Population Base is **42 573 129**

Unweighted data: Age



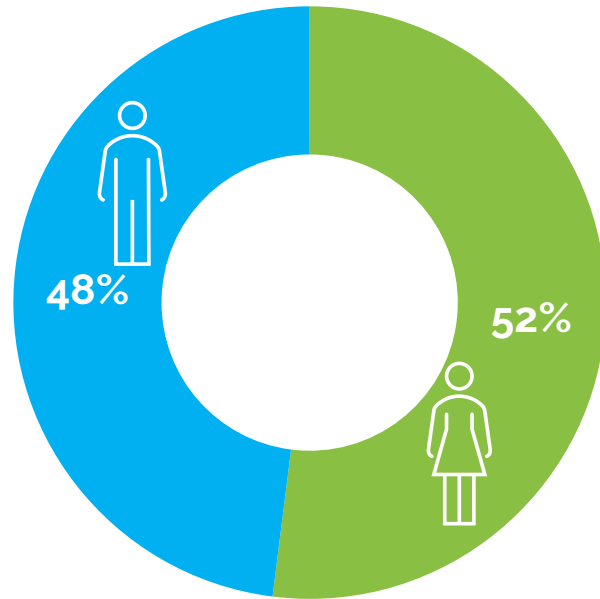
Average age of respondents is **35 years**

Sample Base is **10 024**



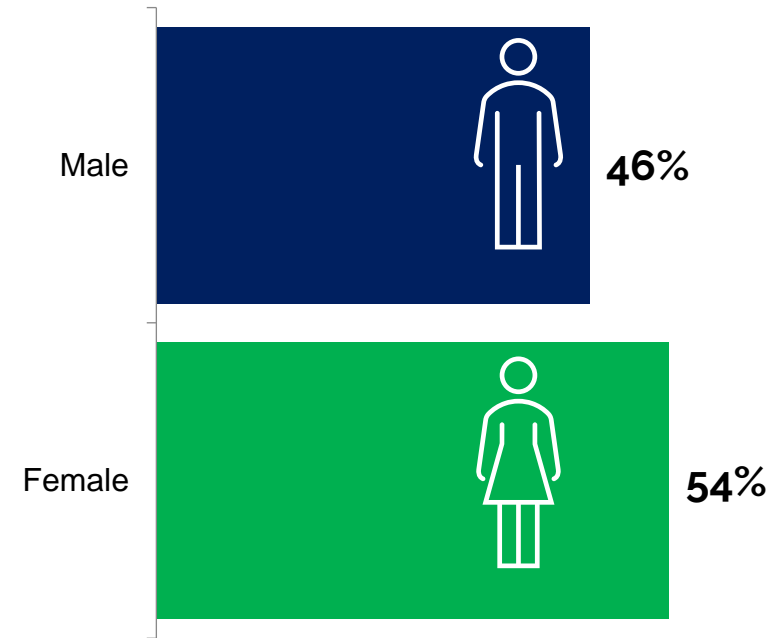
Demographic Profile

Weighted data: Gender



Population Base is **42 573 129**

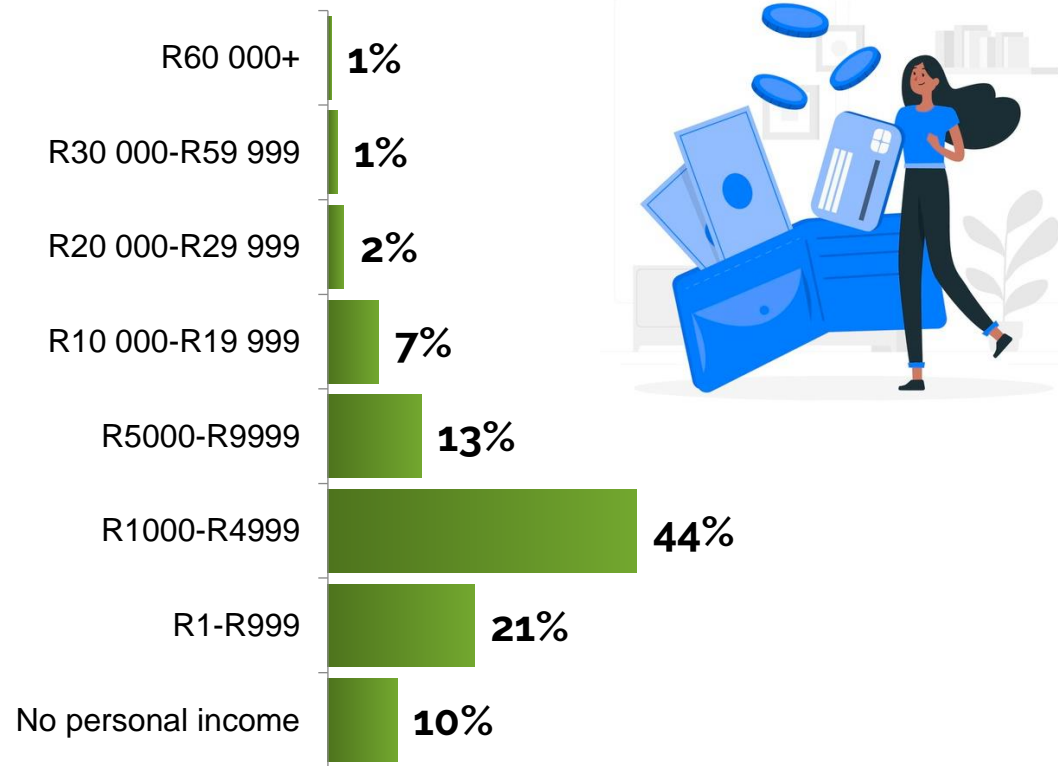
Unweighted data: Gender



Sample Base is **10 024**

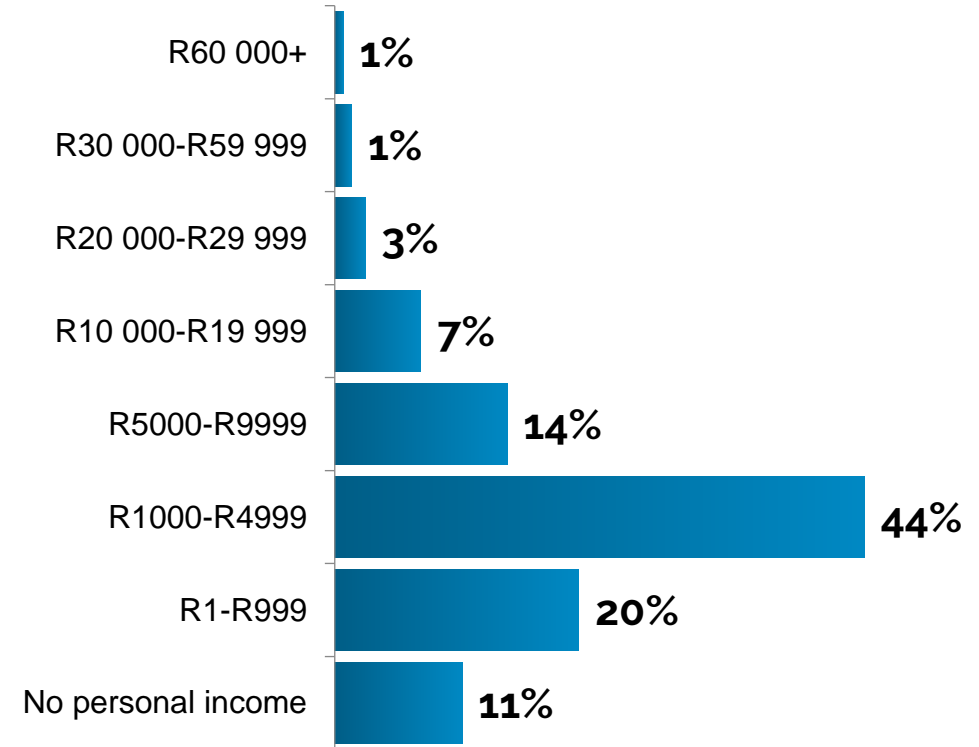
Demographic Profile

Weighted data: Personal Income



Population Base is **42 573 129**

Unweighted data: Personal Income

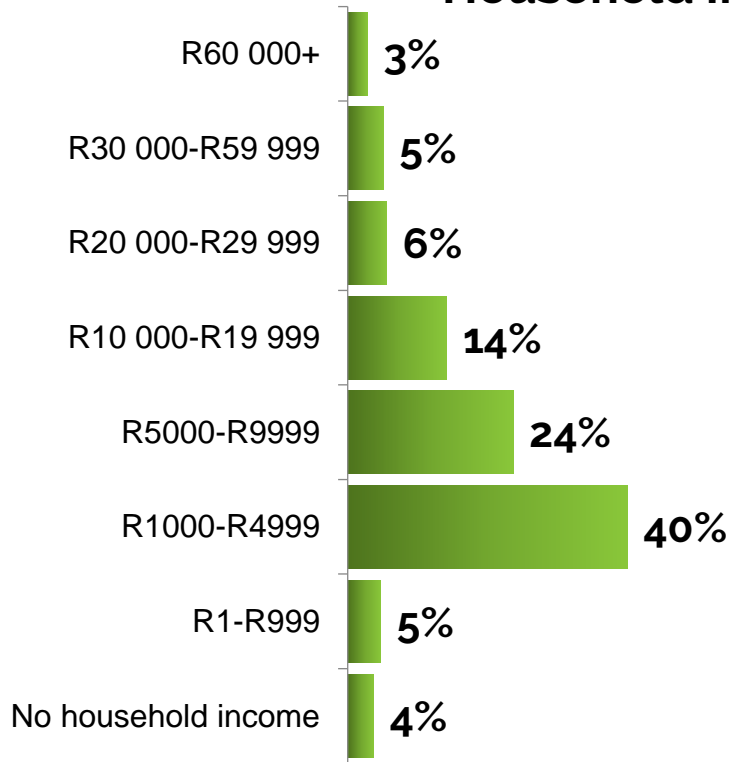


Sample Base is **10 024**



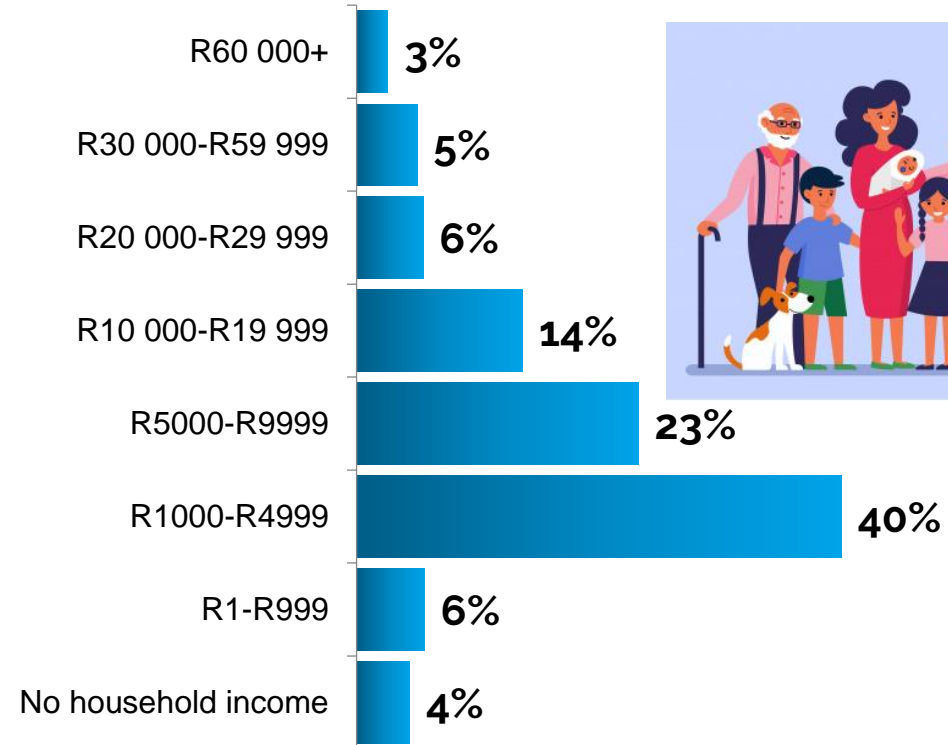
Demographic Profile

Weighted data: Household Income



Population Base is **42 573 129**

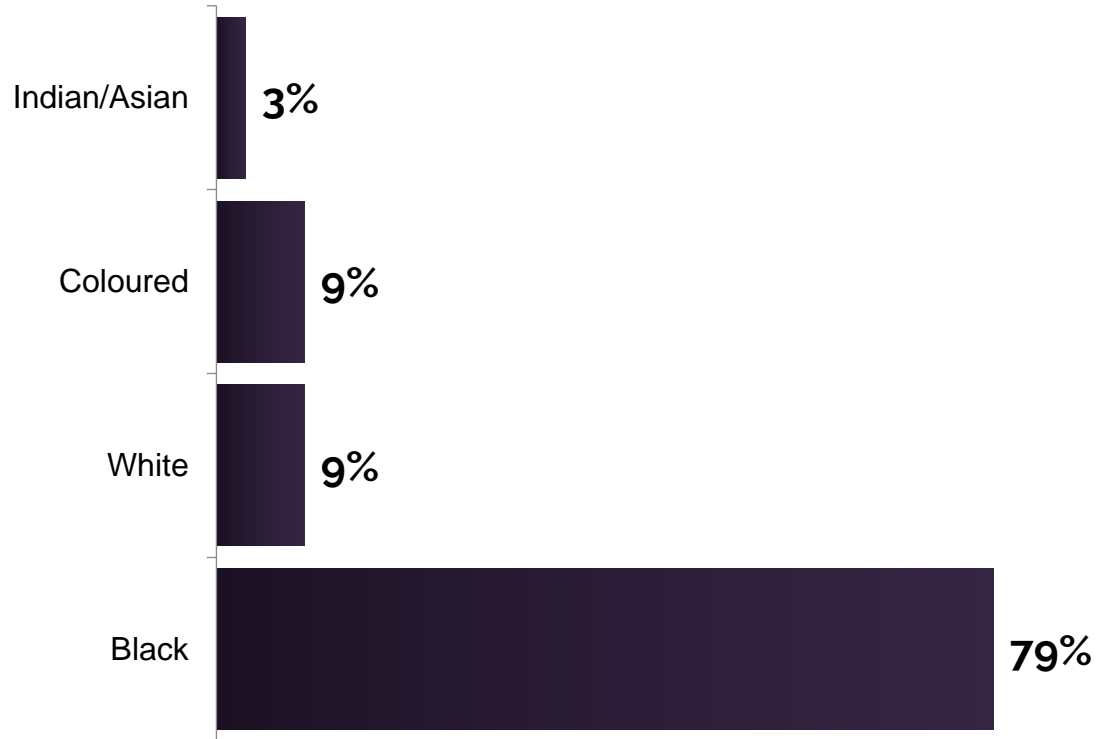
Unweighted data: Household Income



Sample Base is **10 024**

Demographic Profile

Weighted data:
Race



Population Base is **42 573 129**

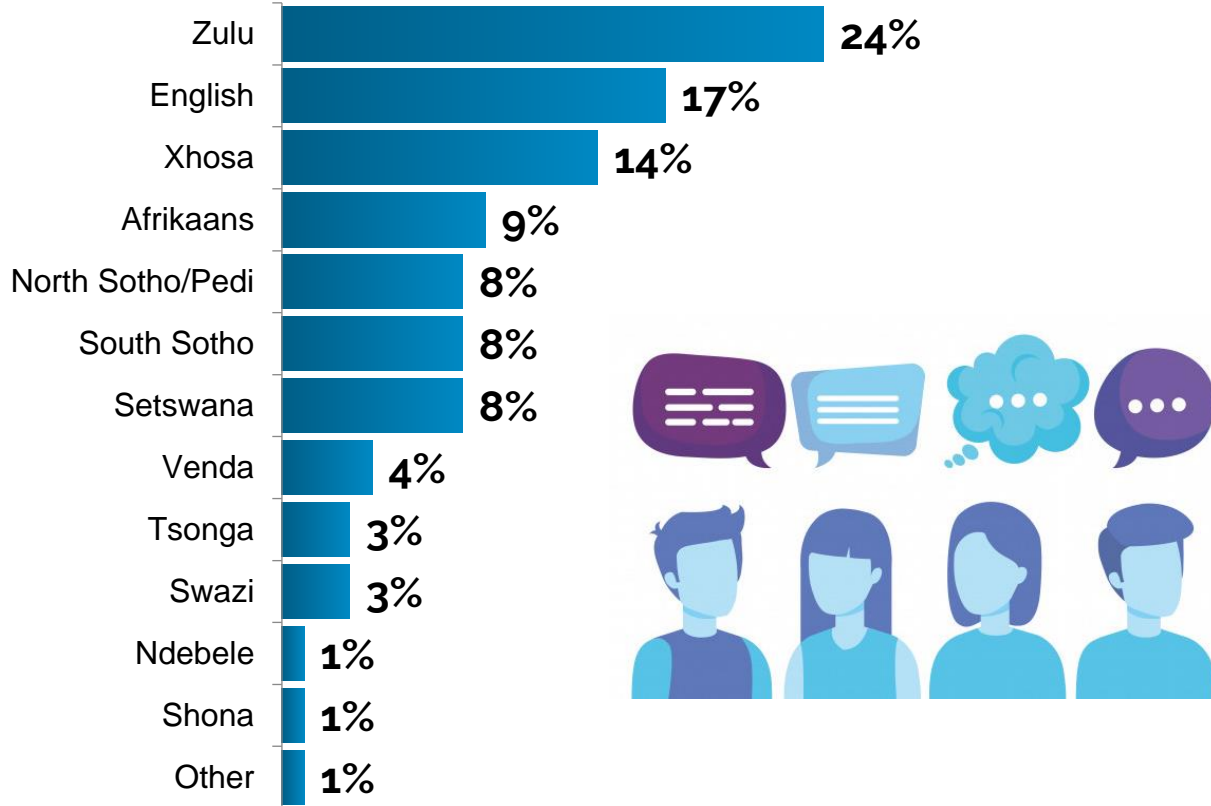
Unweighted data:
Race



Sample Base is **10 024**

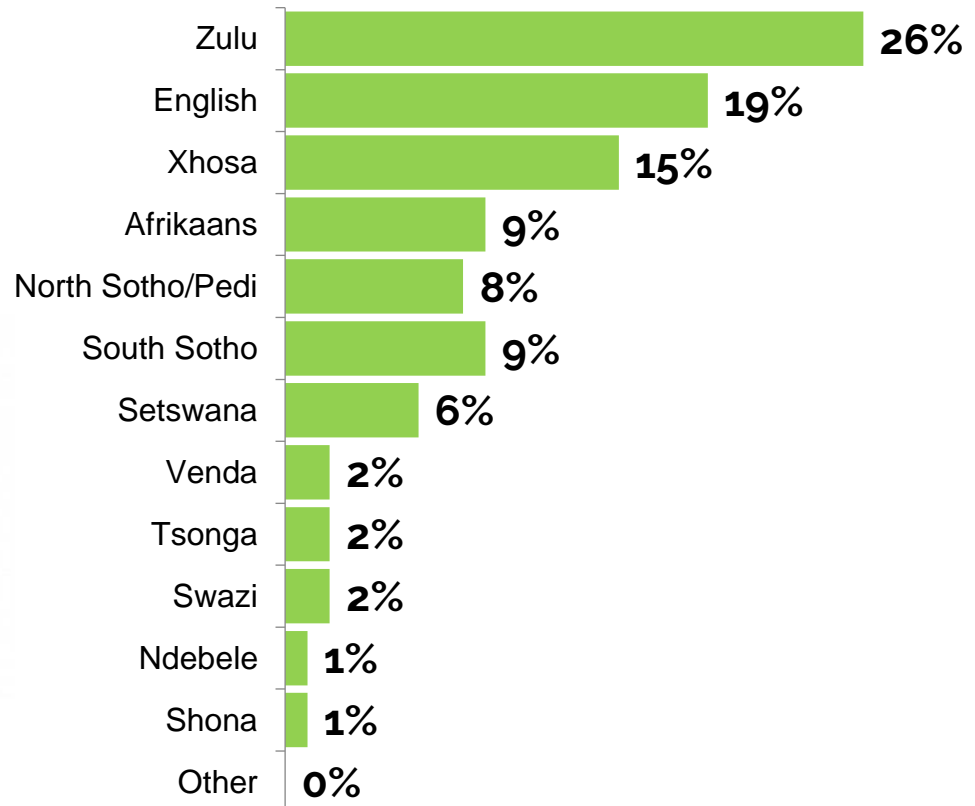
Demographic Profile

**Weighted data:
Most Spoken Language**



Population Base is **42 573 129**

**Unweighted data:
Most Spoken Language**

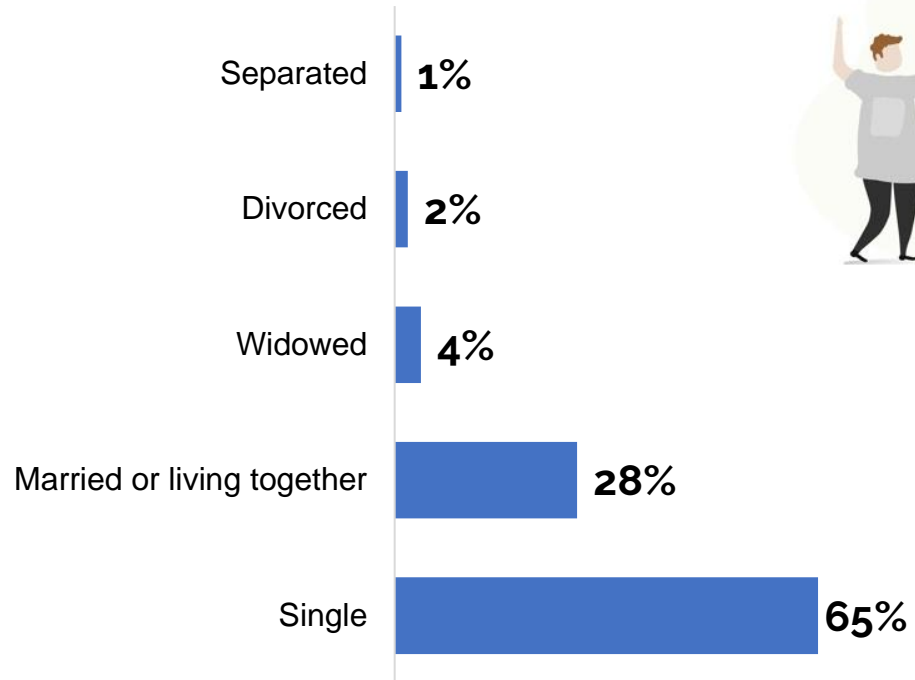


Sample Base is **10 024**



Demographic Profile

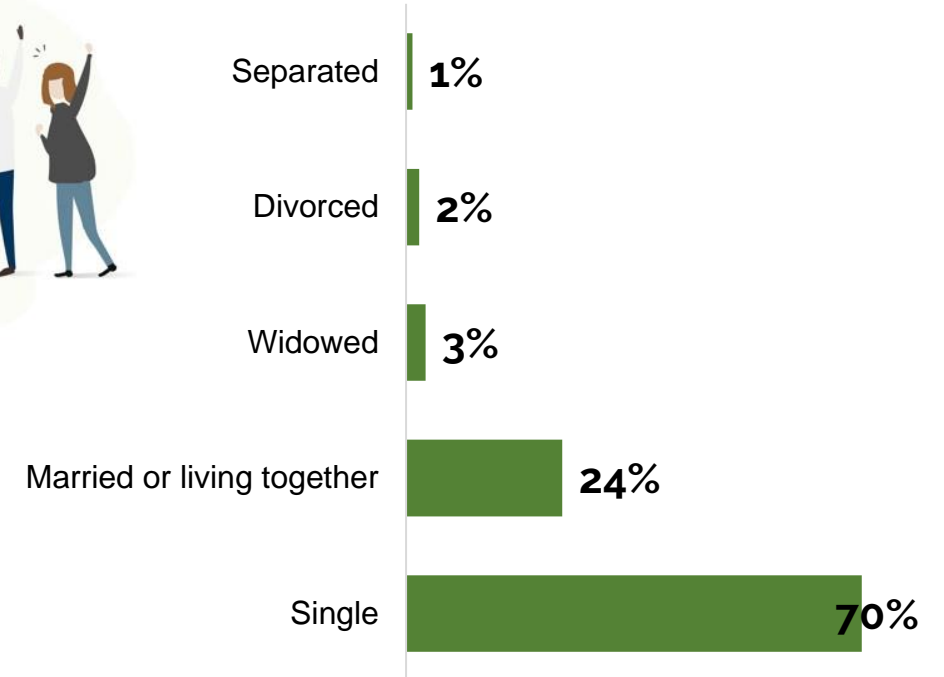
Weighted data: Marital Status



Population Base is **42 573 129**



Unweighted data: Marital Status



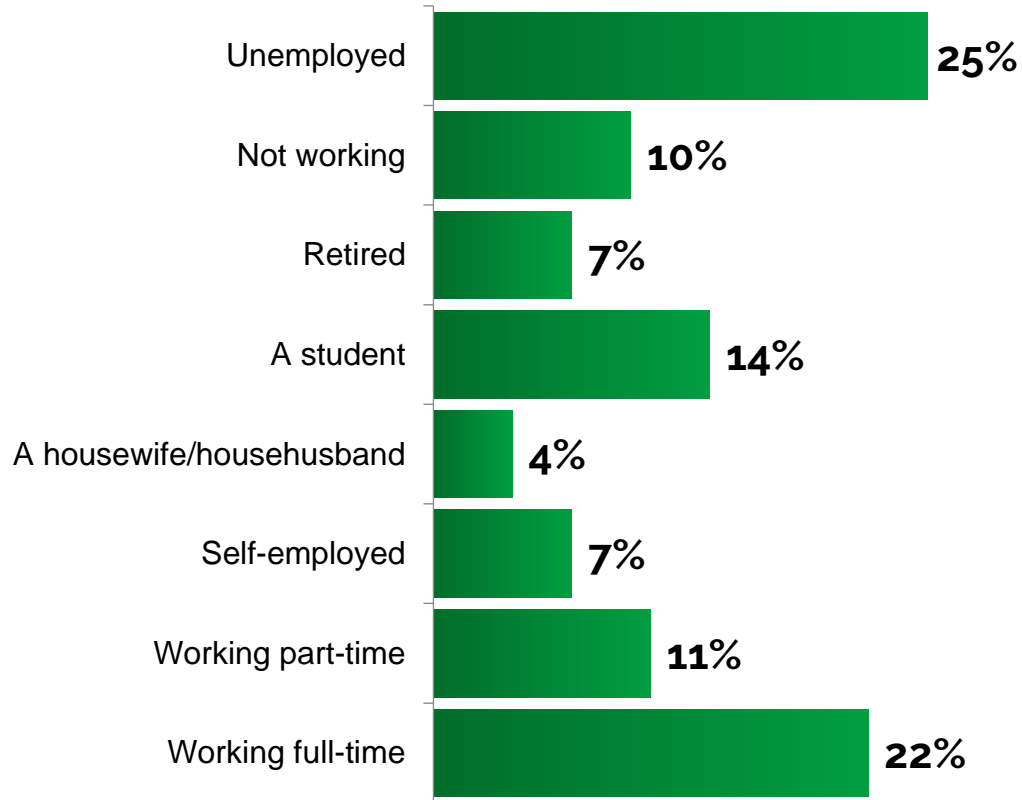
Sample Base is **10 024**



Demographic Profile

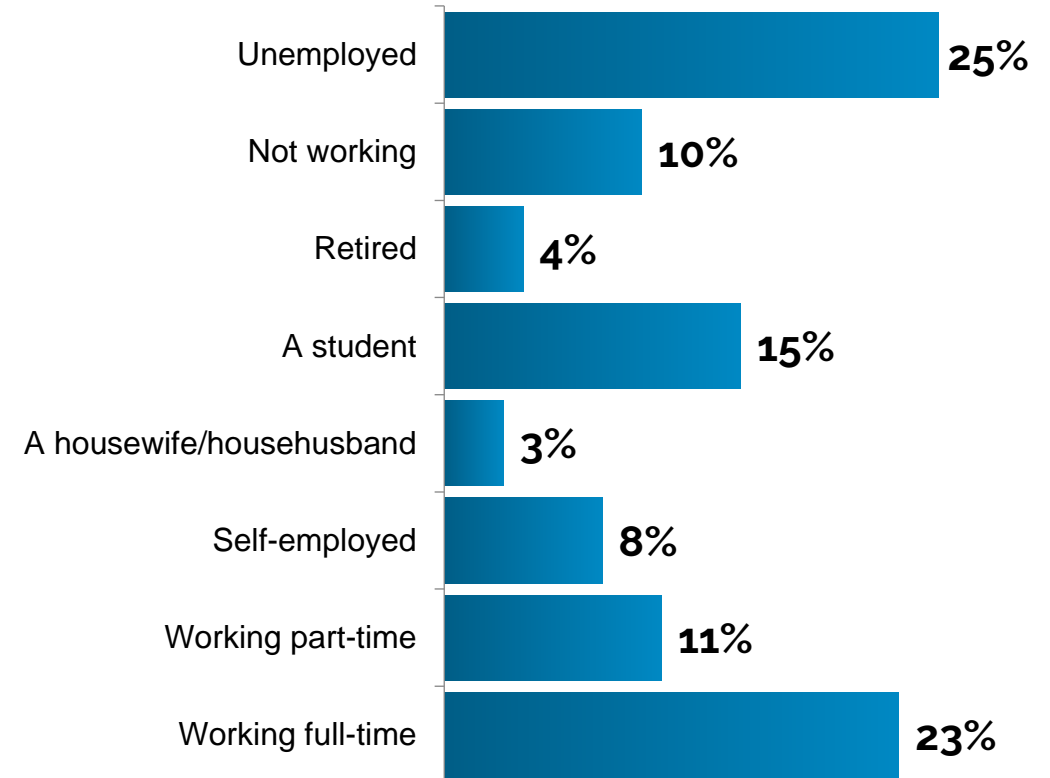


**Weighted data:
Employment Status**



Population Base is **42 573 129**

**Unweighted data:
Employment Status**



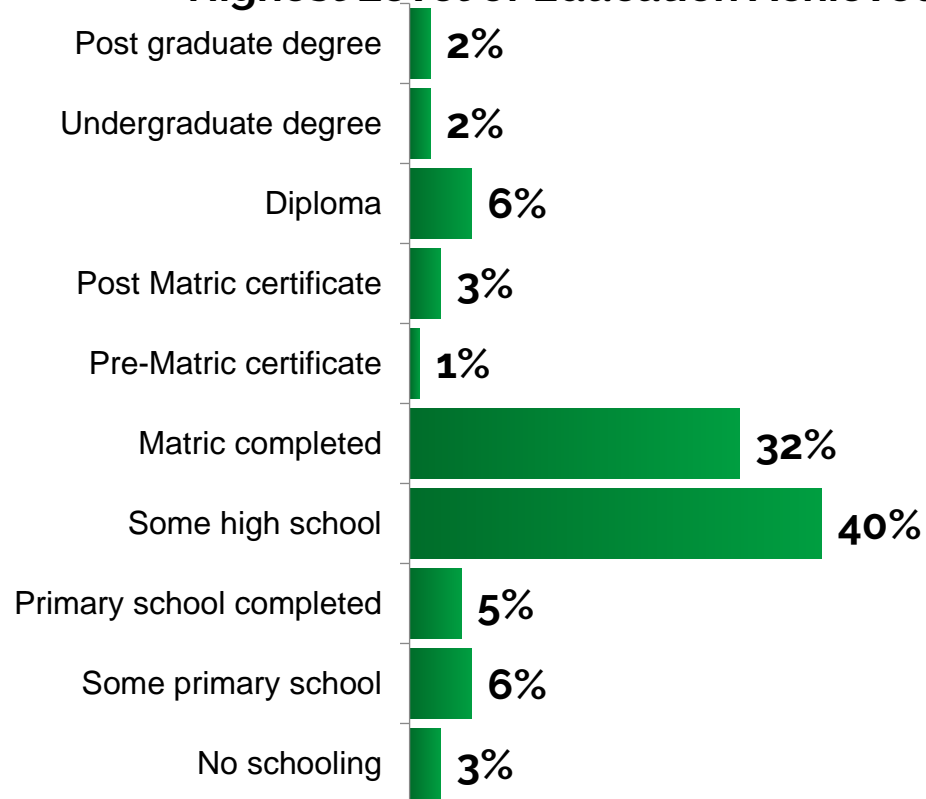
Sample Base is **10 024**



Demographic Profile

Weighted data:

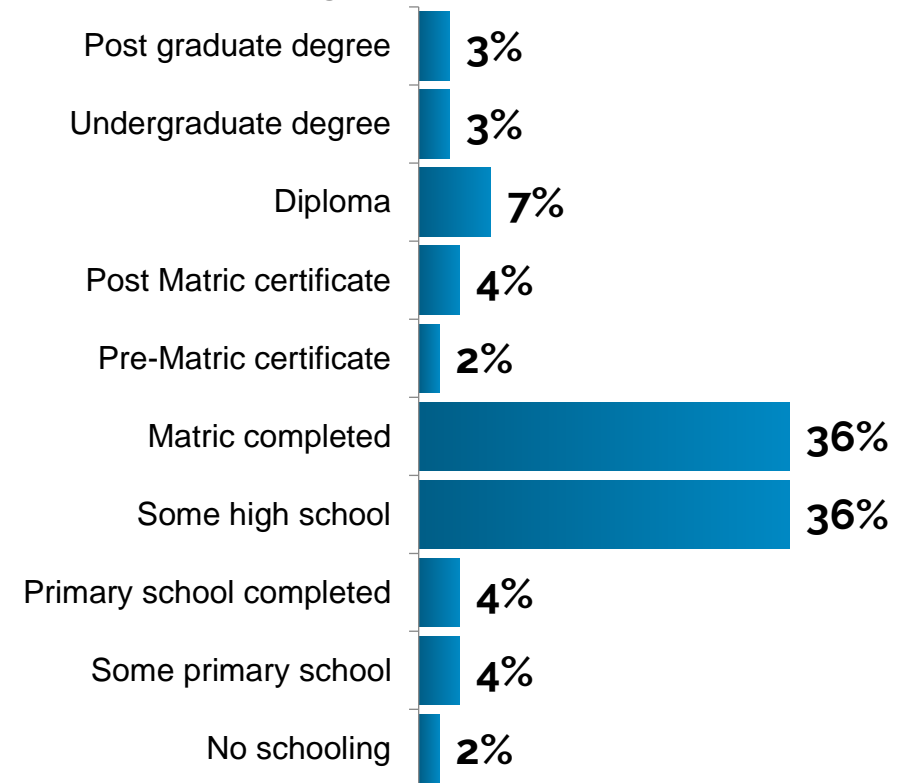
Highest Level of Education Achieved



Population Base is **42 573 129**

Unweighted data:

Highest Level of Education Achieved

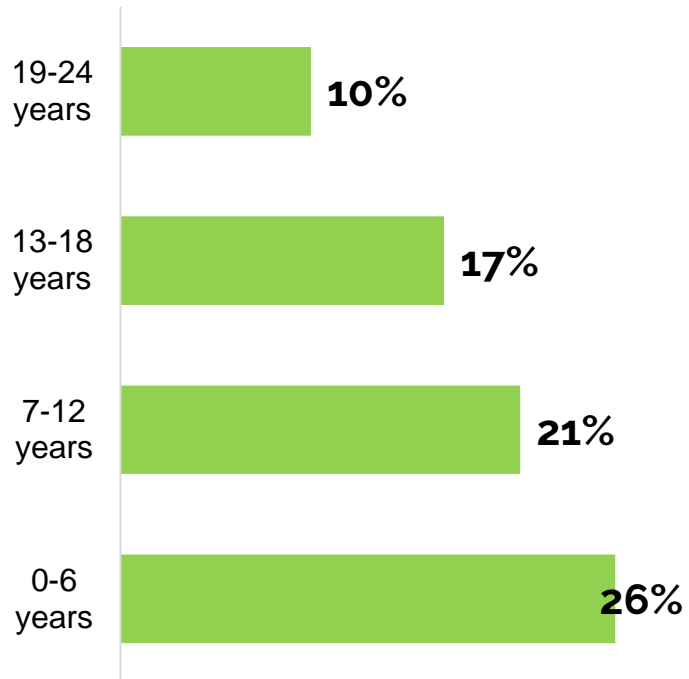


Sample Base is **10 024**

Demographic Profile

Population Base is **42 573 129**

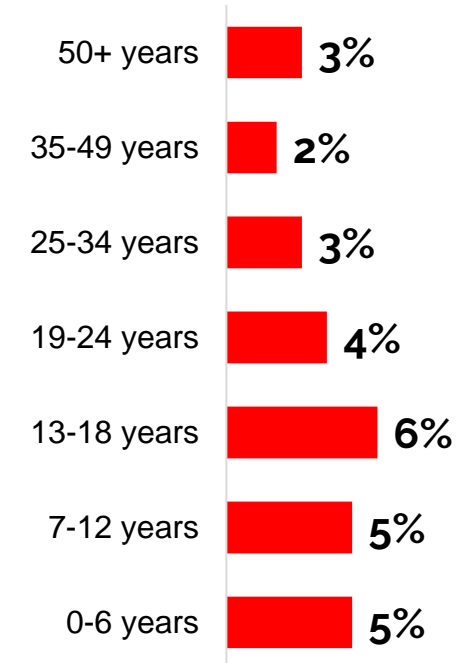
Dependents (own children)



48% of respondents have dependents who are their own children.



Other dependents (not own children)



19% of respondents have dependents who are **not** their own children.

55% of all respondents have dependents.



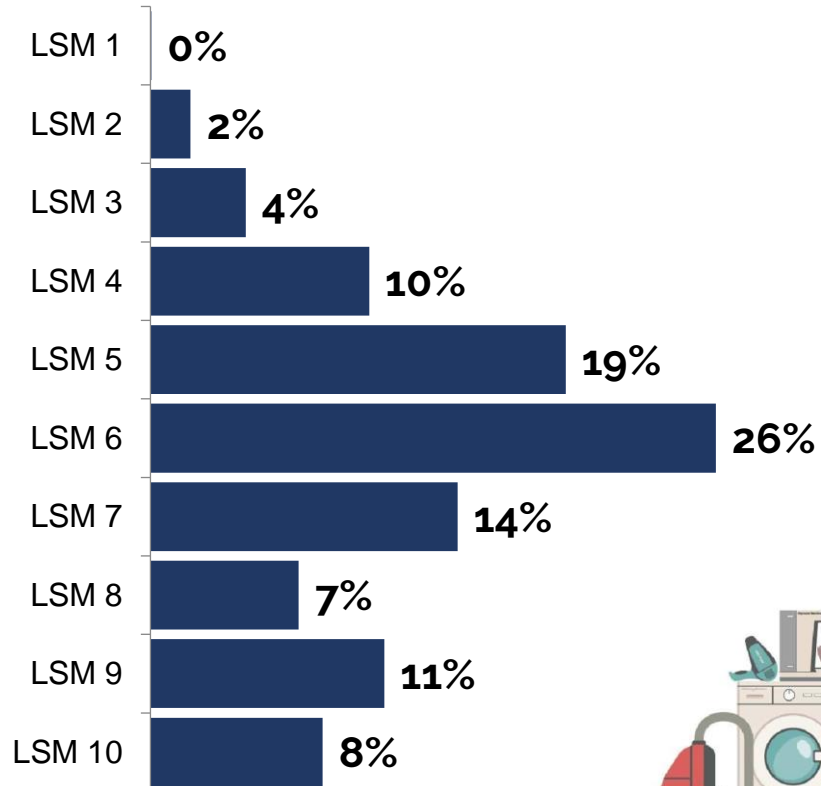


SEGMENTATION

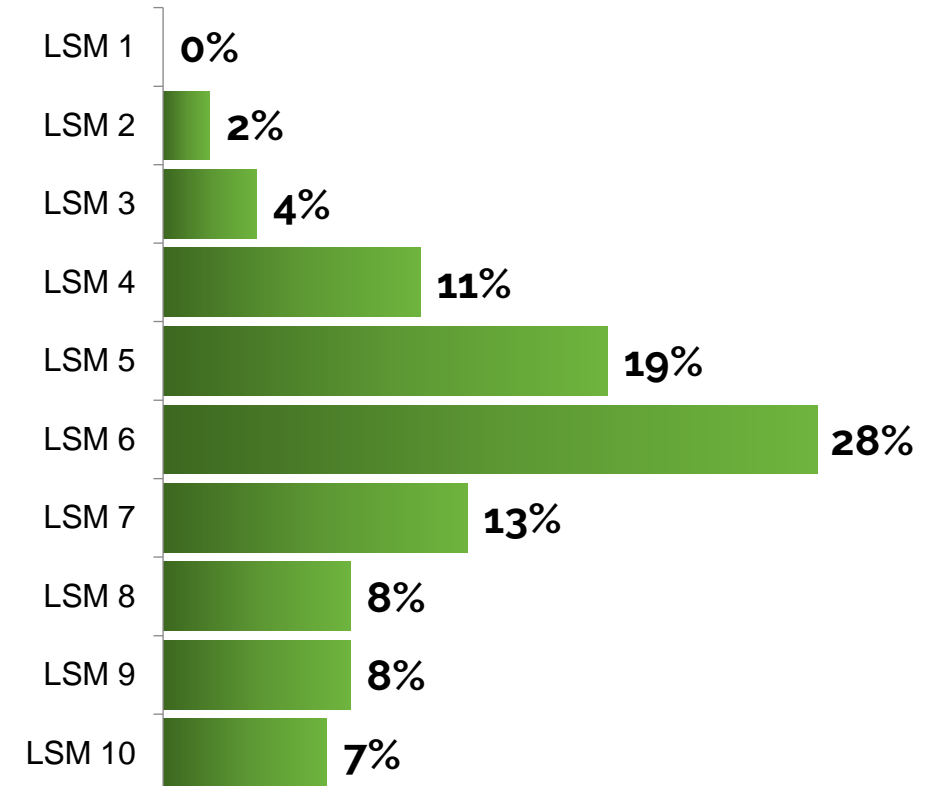
LSM Segmentation

Population Base is **42 573 129**

MAPS 2020 LSM Segments



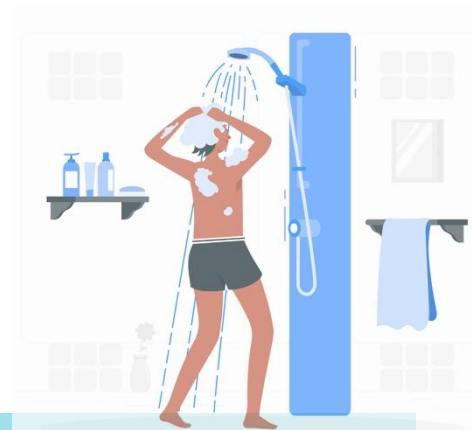
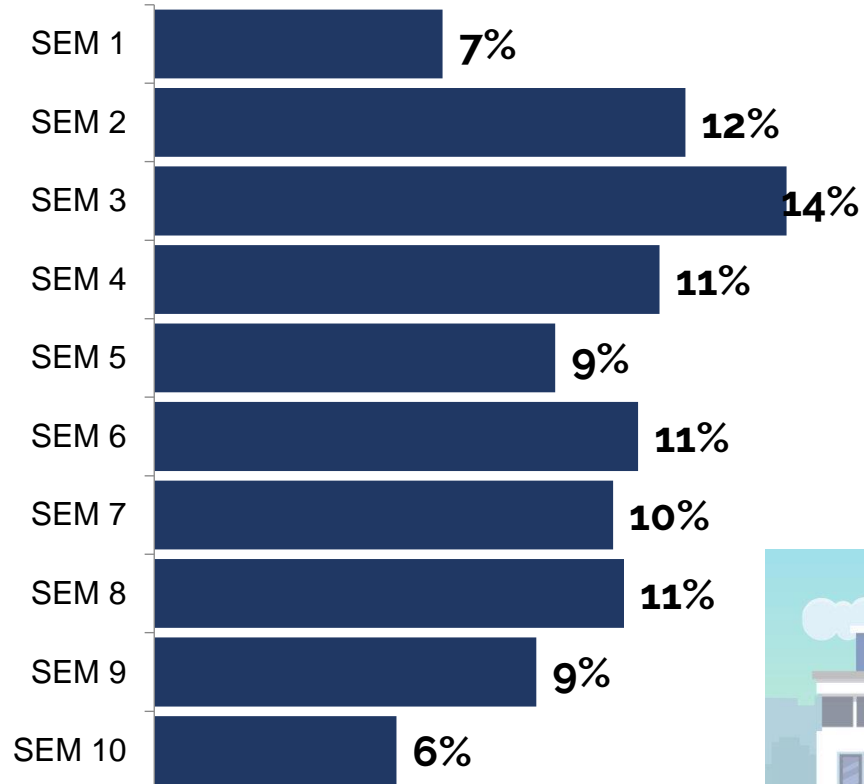
PAMS 2019 LSM Segments



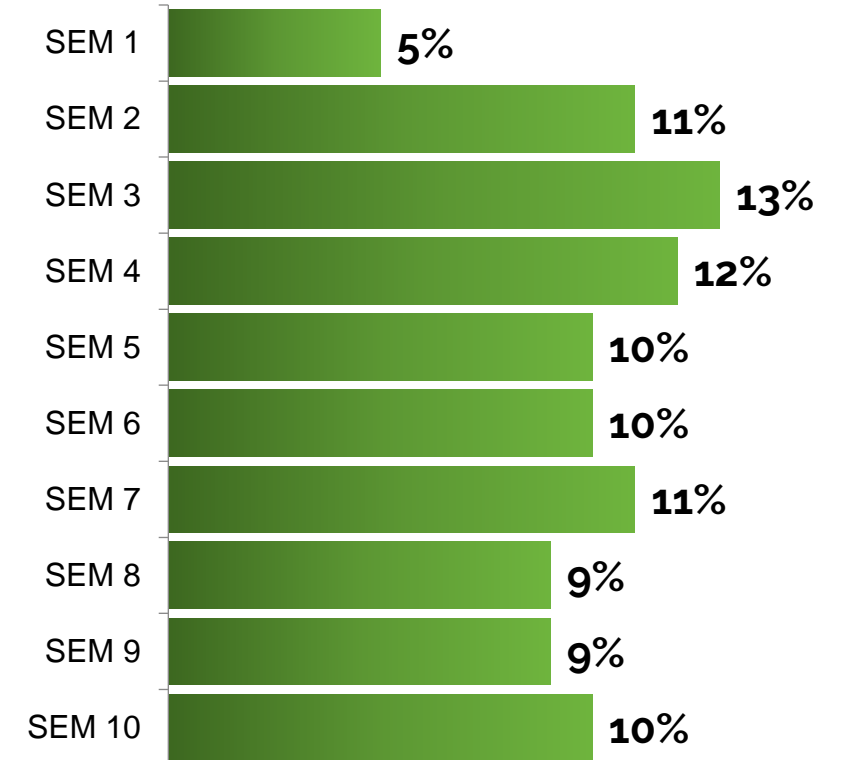
SEM Segmentation

Population Base is **42 573 129**

MAPS 2020 SEM Segments



PAMS 2019 SEM Segments



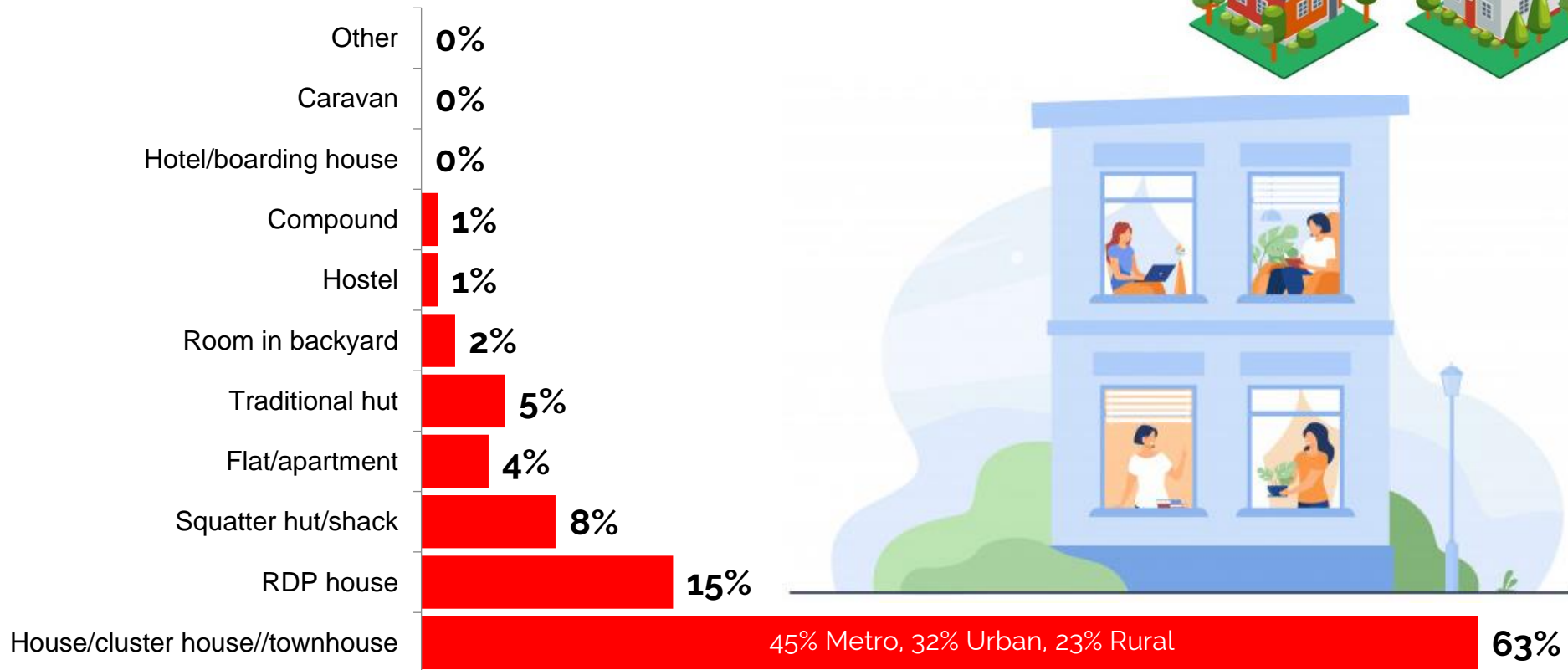


HOME ACCESS TO BASIC AMENITIES

Access to basic amenities

Population Base is **42 573 129**

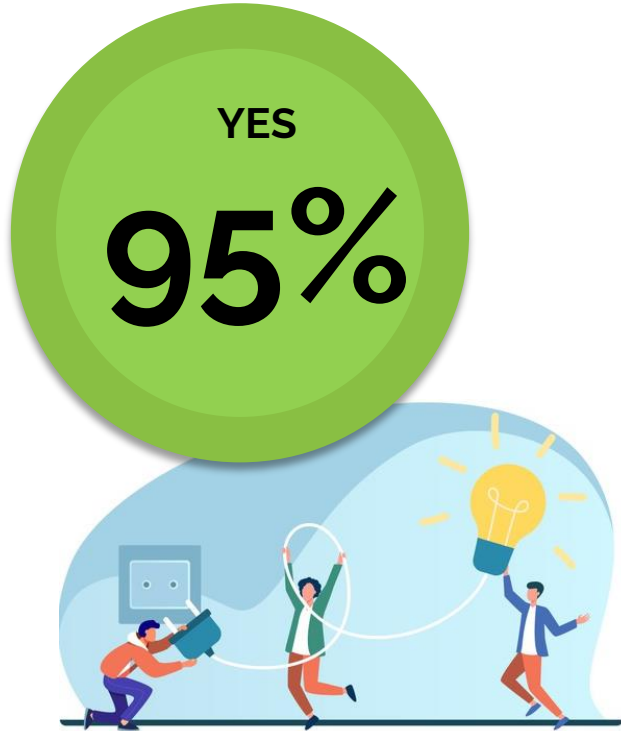
Type of dwelling



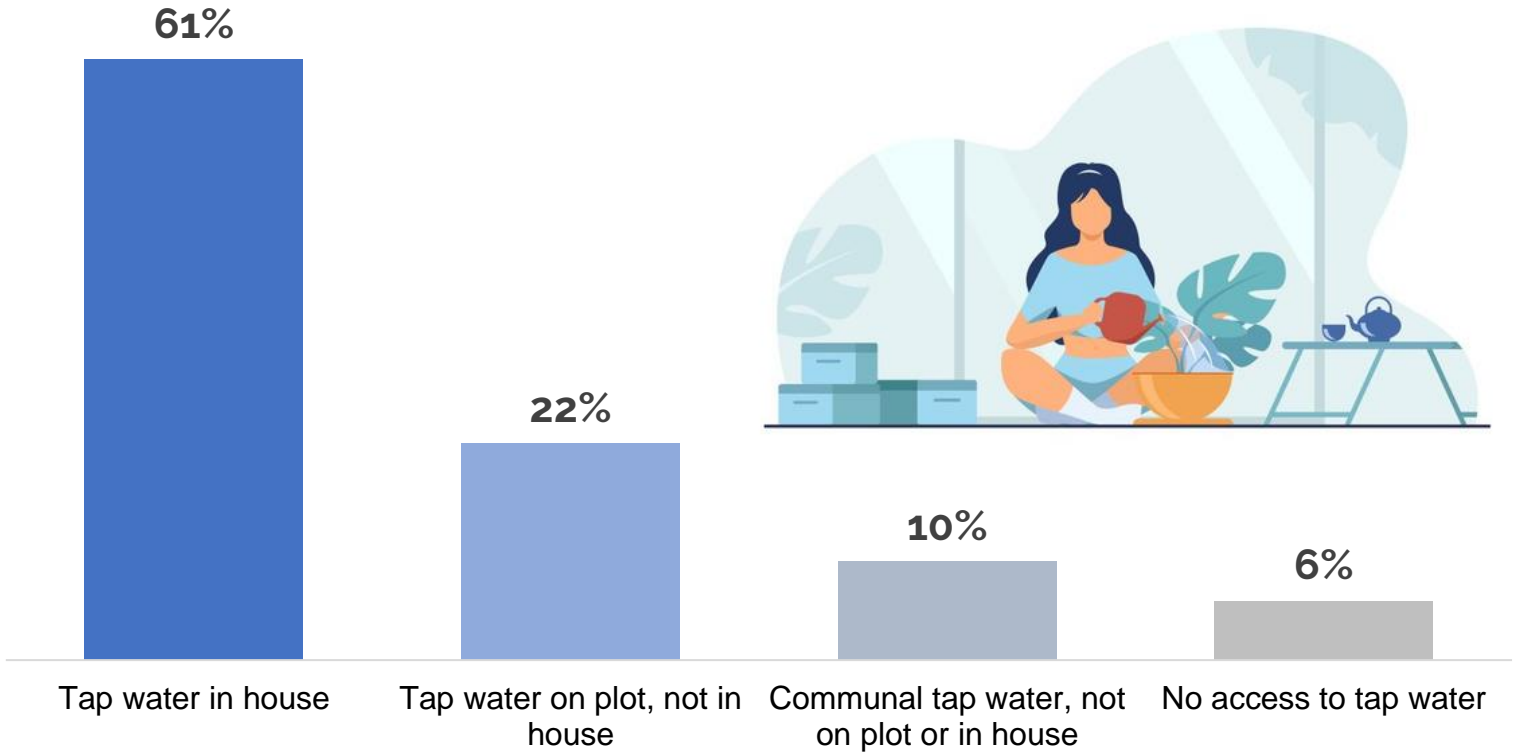
Access to basic amenities

Population Base is **42 573 129**

Electricity in the home



Water Laid

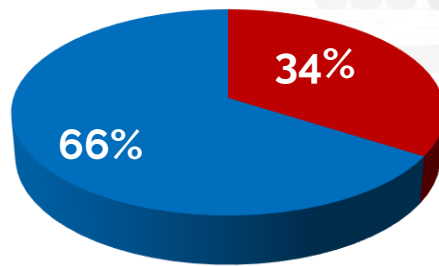


Access to basic amenities

Population Base is **42 573 129**

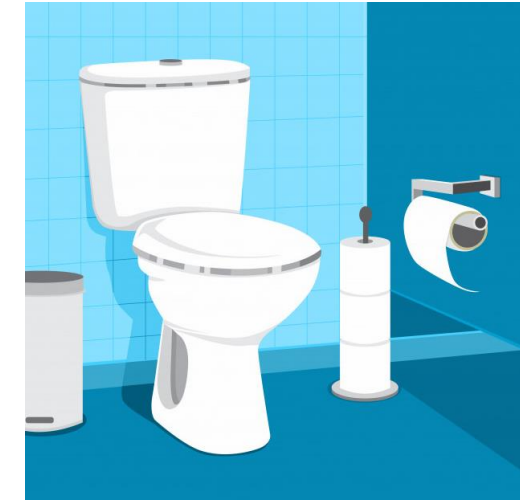


Hot running water
from a geyser

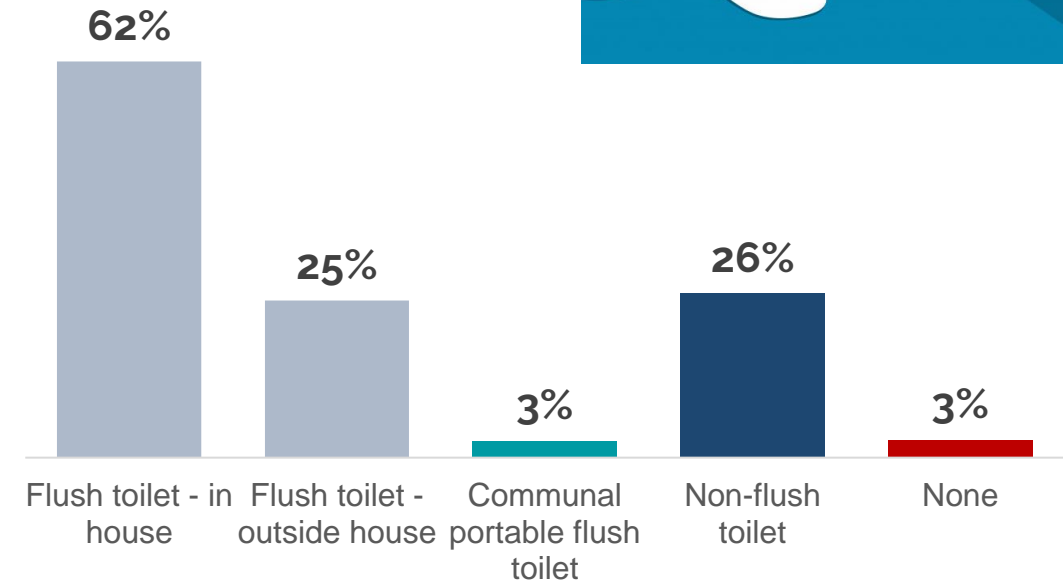


■ Yes ■ No

Stats SA GHS results of 2019: **28%** of households in South Africa have hot running water from a geyser.



Type of Toilet





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MEDIA

Media Population Penetration

Population Base is **42 573 129**



Newspapers
Past 3 months

48%



Magazines
Past 3 months

24%



Store Magazines
Past 3 months

24%



Television
Past 4 weeks

79%



Cinema
Past 6 months

3%



Radio
Past 4 weeks

73%



Outdoor Advertising
Past 4 weeks

61%



***Social Media**
Past 4 weeks

50%

***42%** excluding WhatsApp

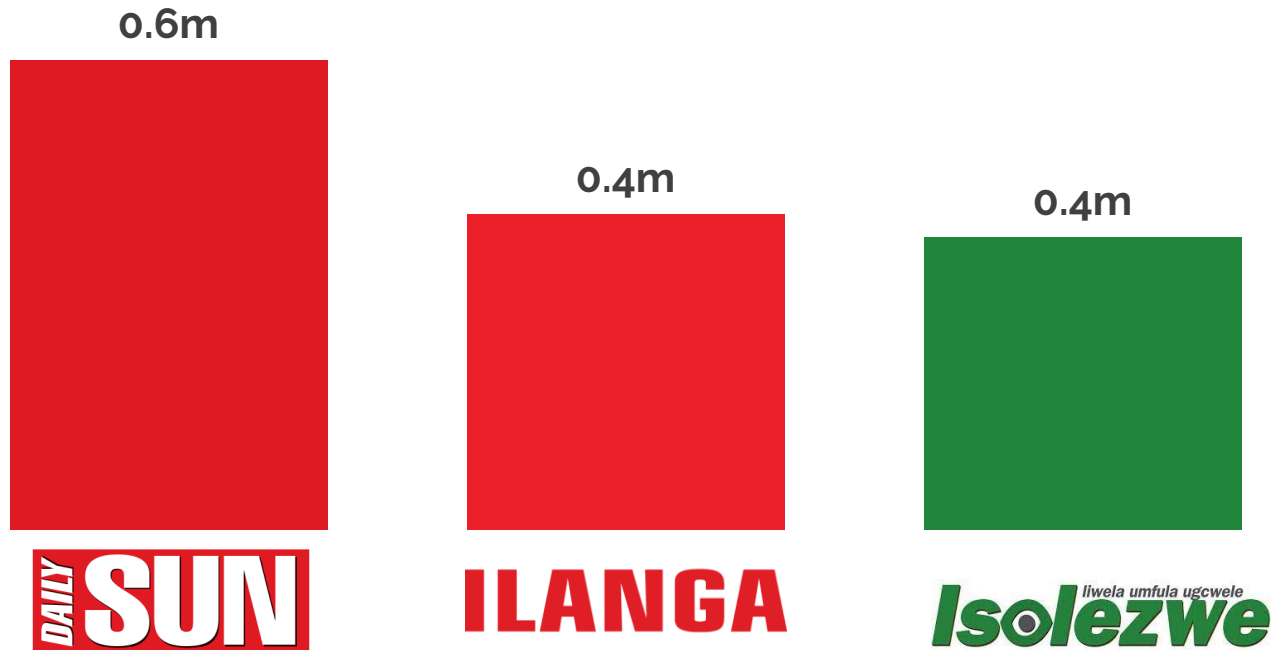
50% Including WhatsApp

Top 3 Newspapers Read

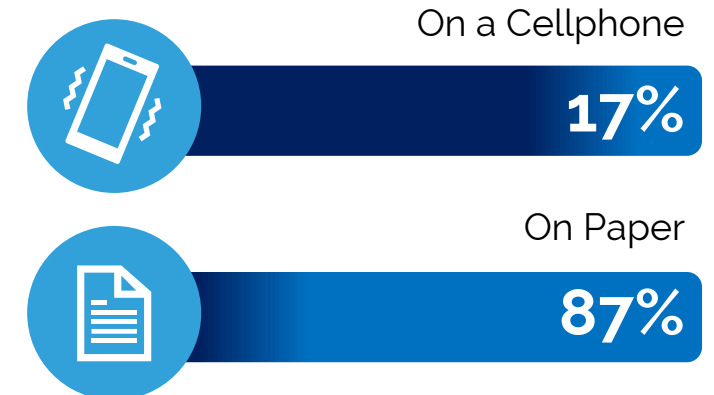
Past 3 months

48% respondents have read newspapers in the past 3 months

Average Issue Readership



Platforms used to read newspapers (Multiple Mentions Possible)



Newspaper Inserts Read

Past 3 months

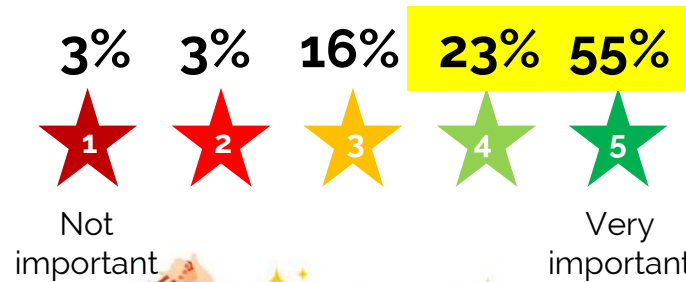
Did you read newspaper inserts?



Sample size: **11 255 451**



Importance of the information in inserts
in defining your shopping list?



Sample size: **8 589 801**



Is there another method of finding the
information that you prefer?

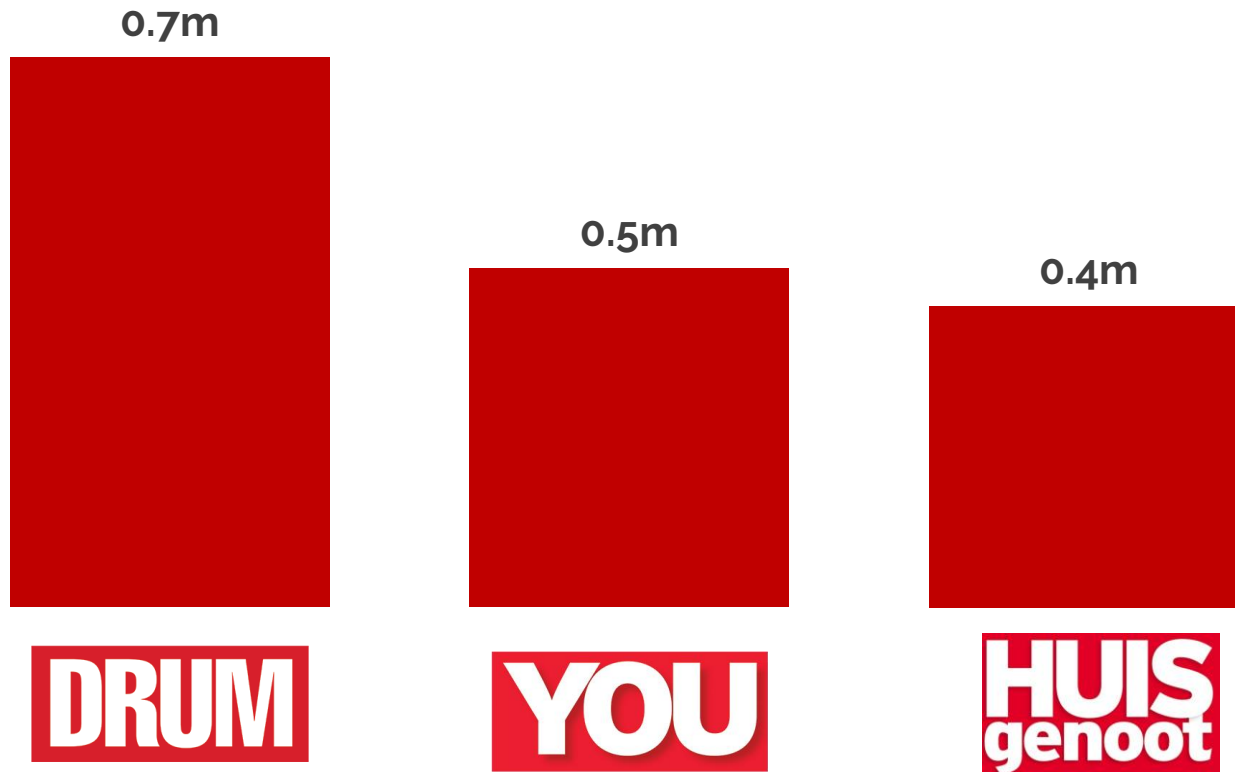


Sample size: **6 699 633**

Top 3 Magazines Read

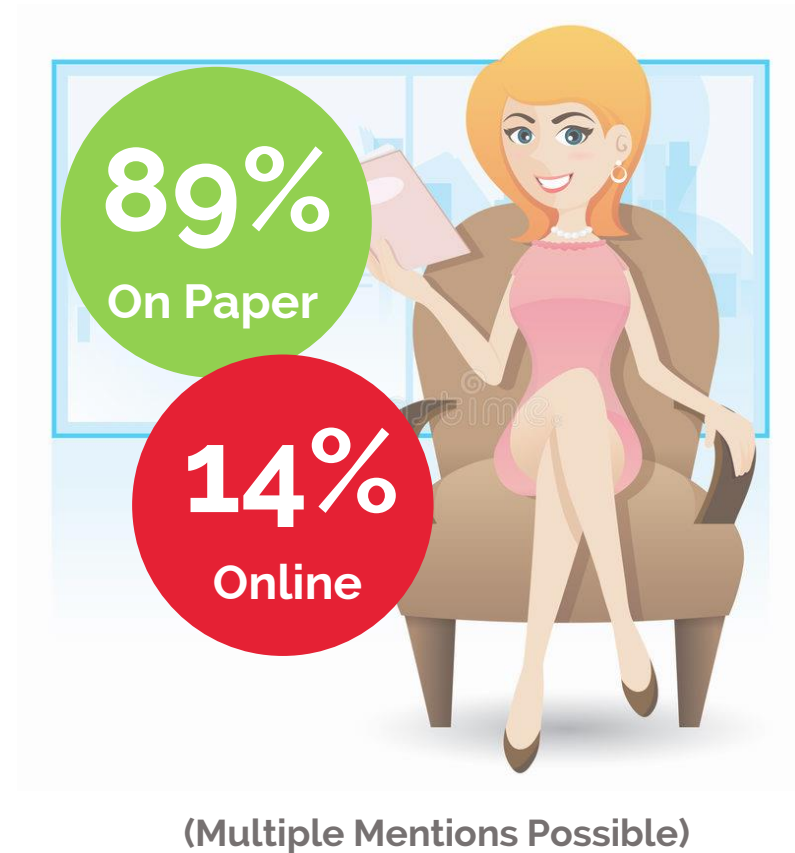
Past 3 months

Average Issue Readership



*Combined readership – print and online readers

24% respondents have read magazines in the past 3 months

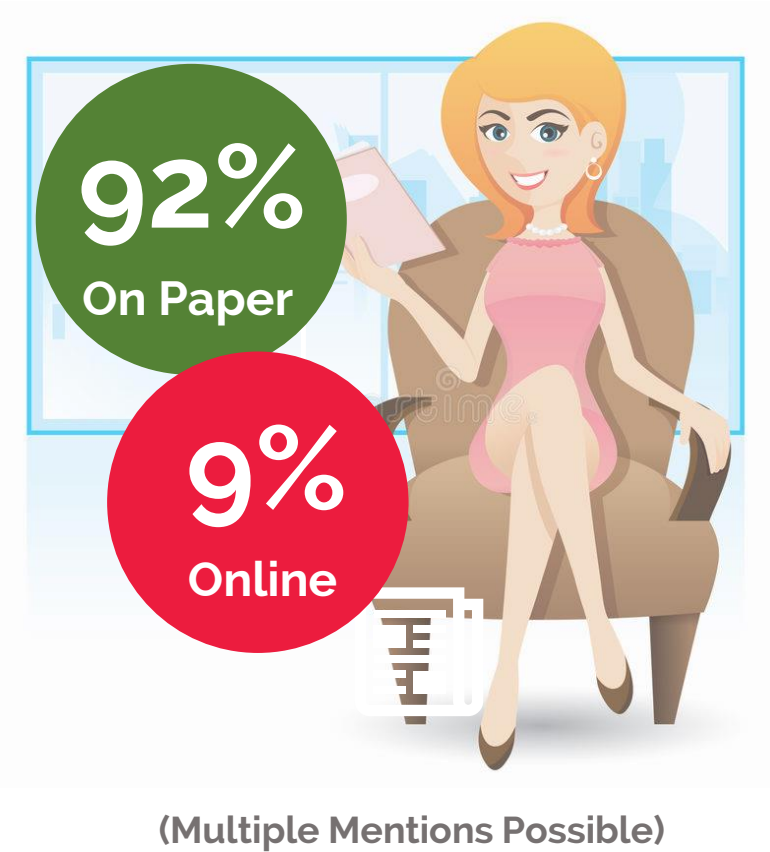
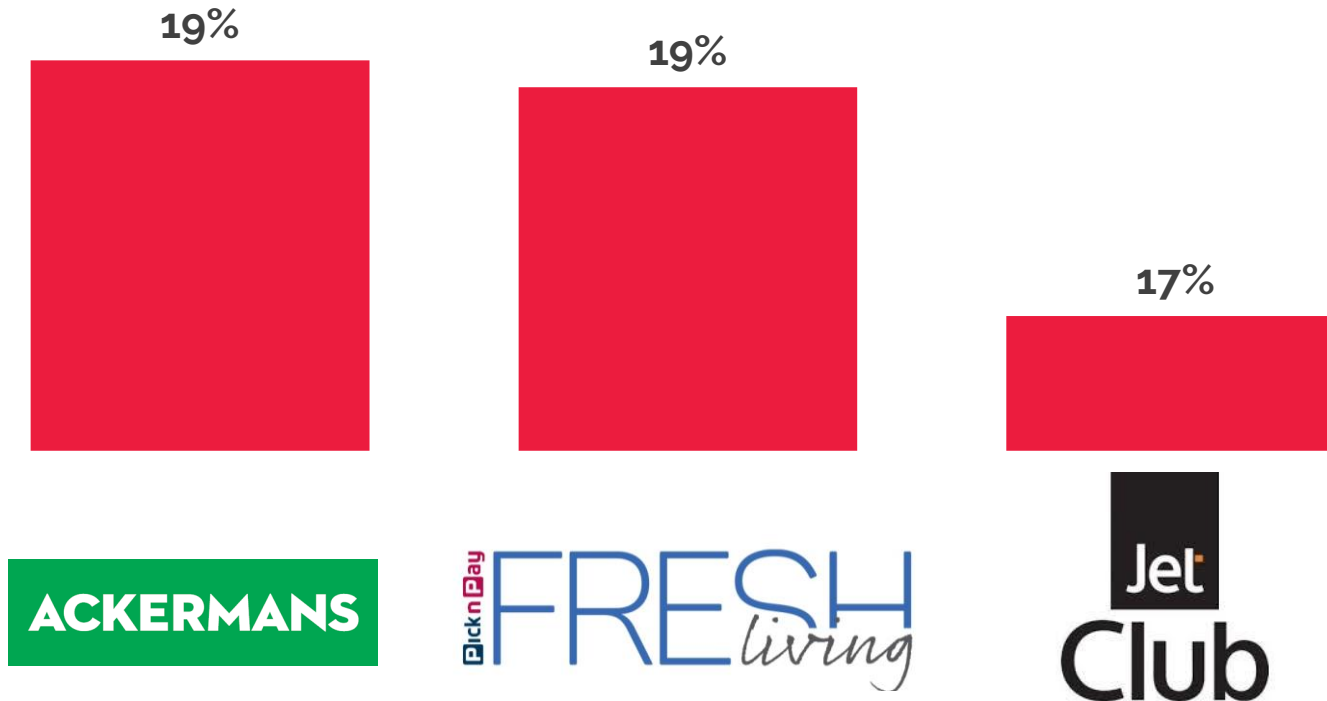


Store Magazines

Past 3 months

24% respondents have read store magazines in the past 3 months.

Top publications among those who read store magazines



Satellite Service Usage



Households with
DStv PVR decoder:

9%

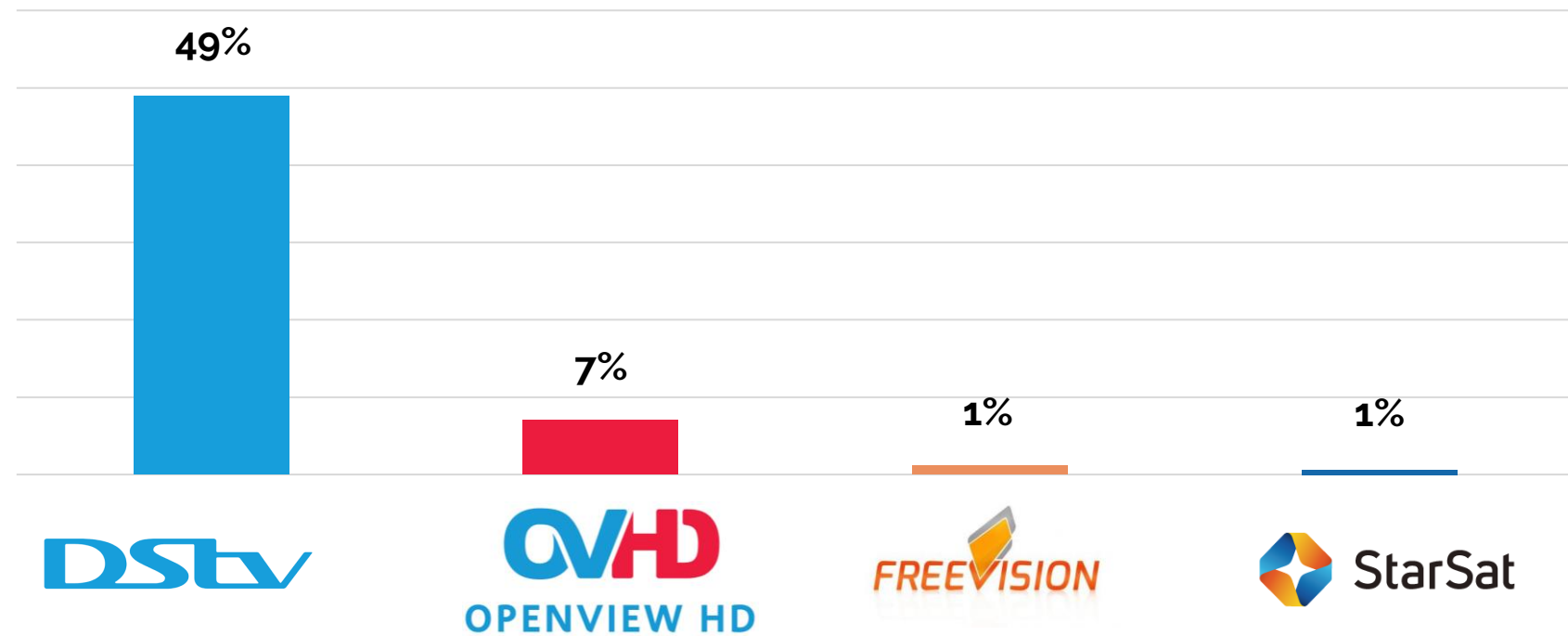


Households with an
OpenView memory
stick:

1%



Satellite Services Used



Top DStv Channels Viewed

Past 4 weeks

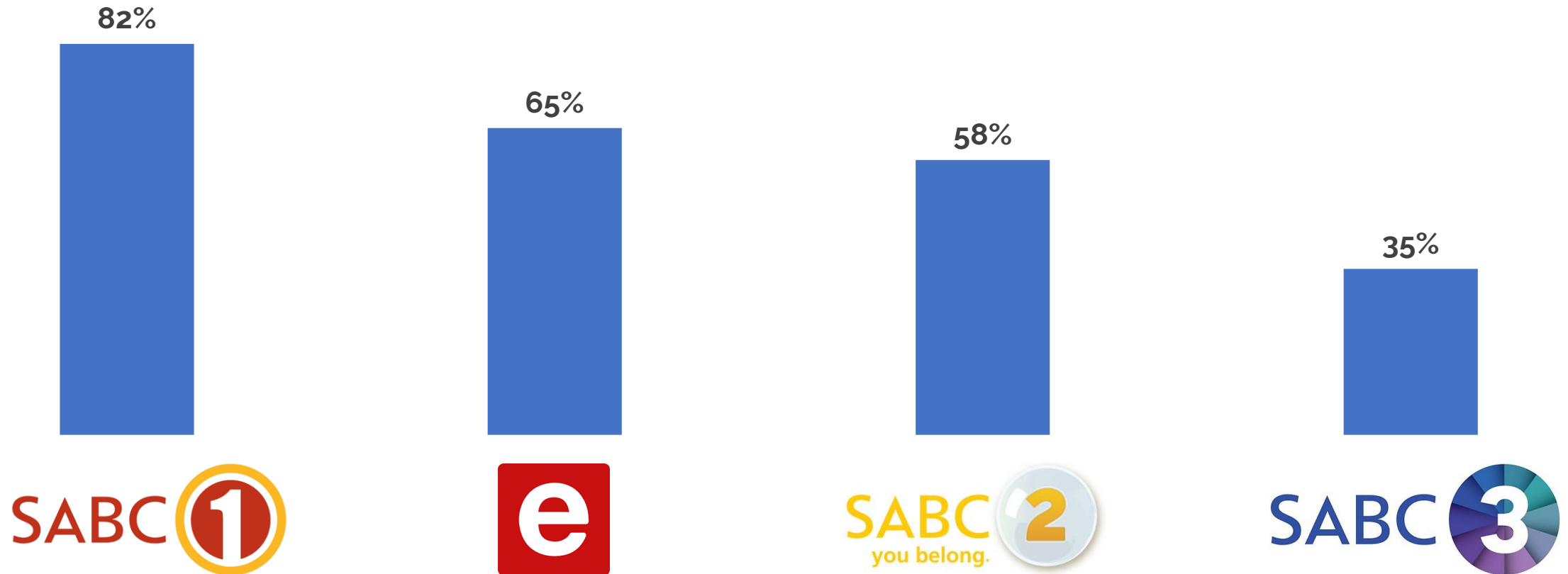
49% respondents viewed DStv channels in the past 4 weeks



Top Free to Air Channels Viewed

Past 4 weeks

23% respondents viewed free to air channels in the past 4 weeks

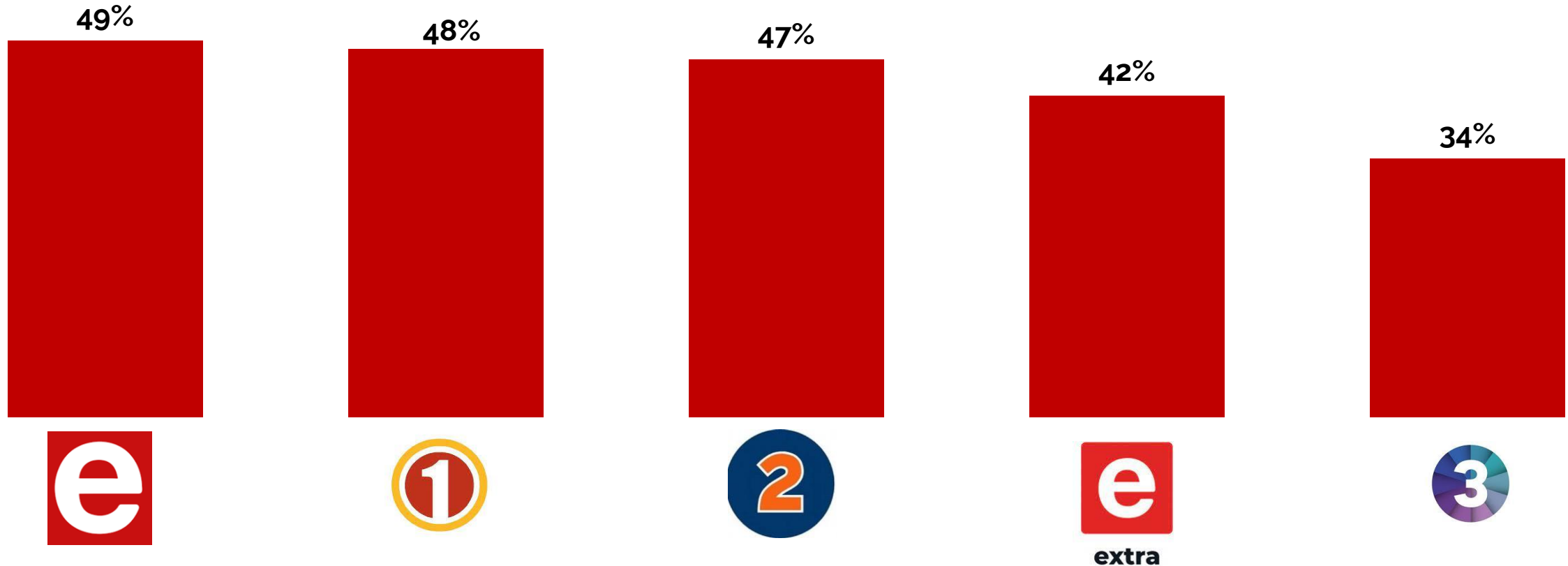


Top OpenView Channels Viewed

Past 4 weeks



7% respondents viewed OpenView channels in the past 4 weeks



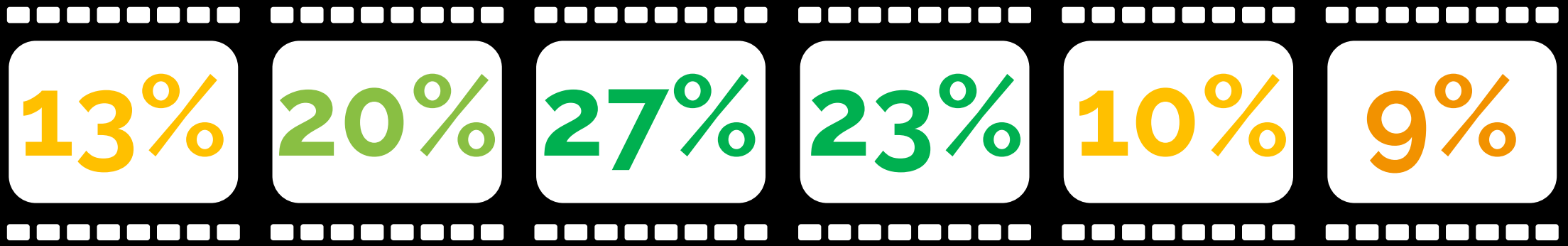
Cinema Visits



3% respondents go out to watch a movie at the cinema

Average number of people that go out on each cinema outing:

3



Very frequently:
At least twice a month

Frequently:
Every month

Regularly:
Once every 2 to 3 months

Occasionally:
Once every 4 to 6 months

Seldom:
Around once a year

Less often



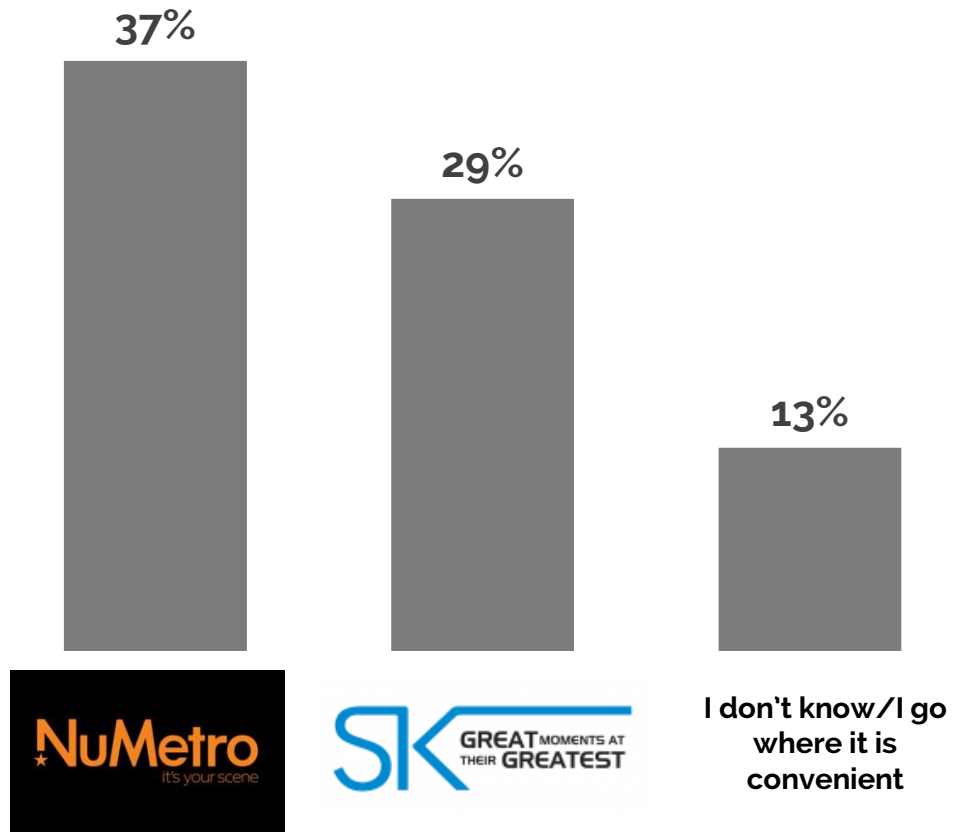
Average cinema outing cost:

R317

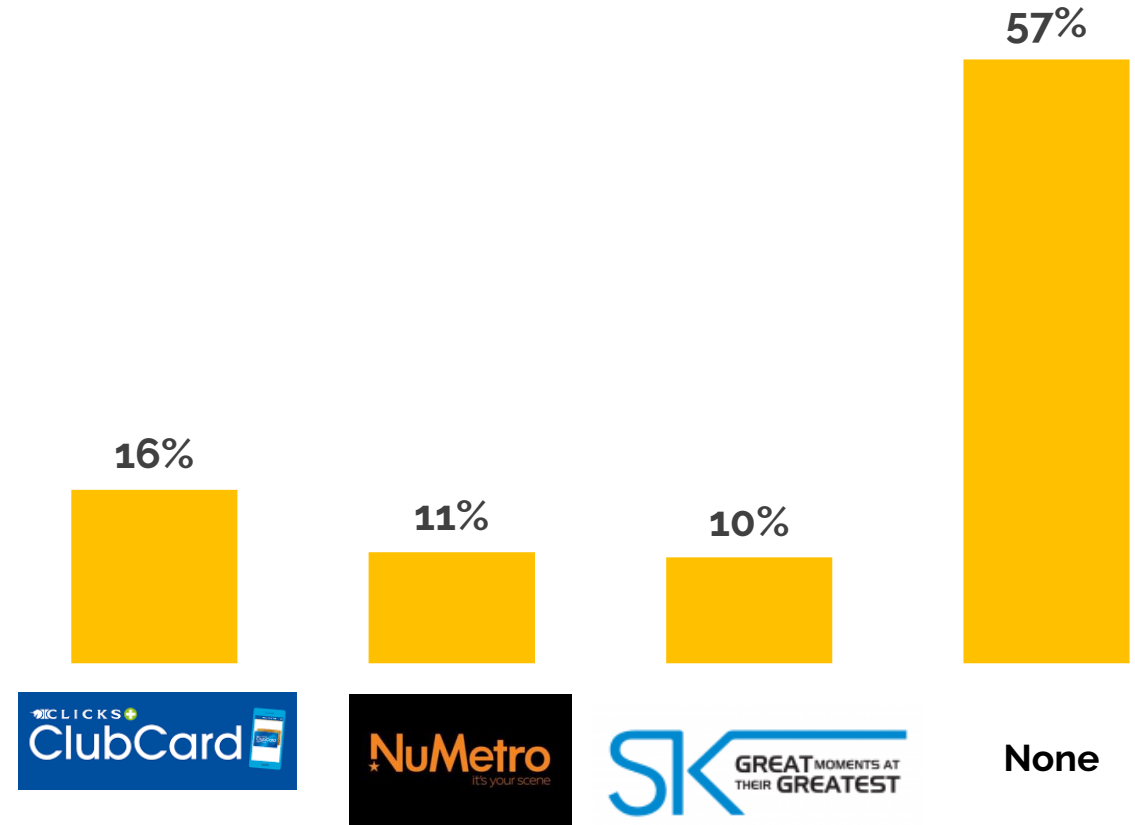
Cinema Visits

3% respondents go out to watch a movie at the cinema

Which cinema chains do you go to most often?



Which cinema loyalty benefits do you use for cinema?

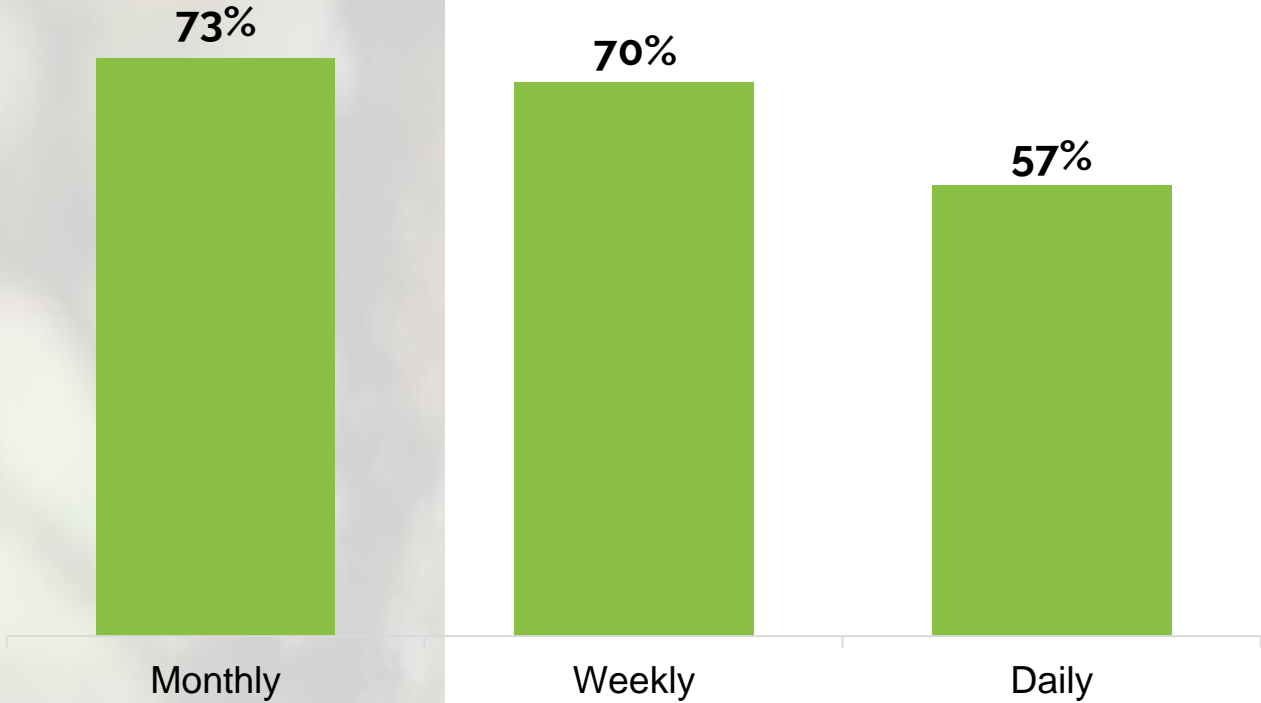


Radio Reach

Population Base is **42 573 129**



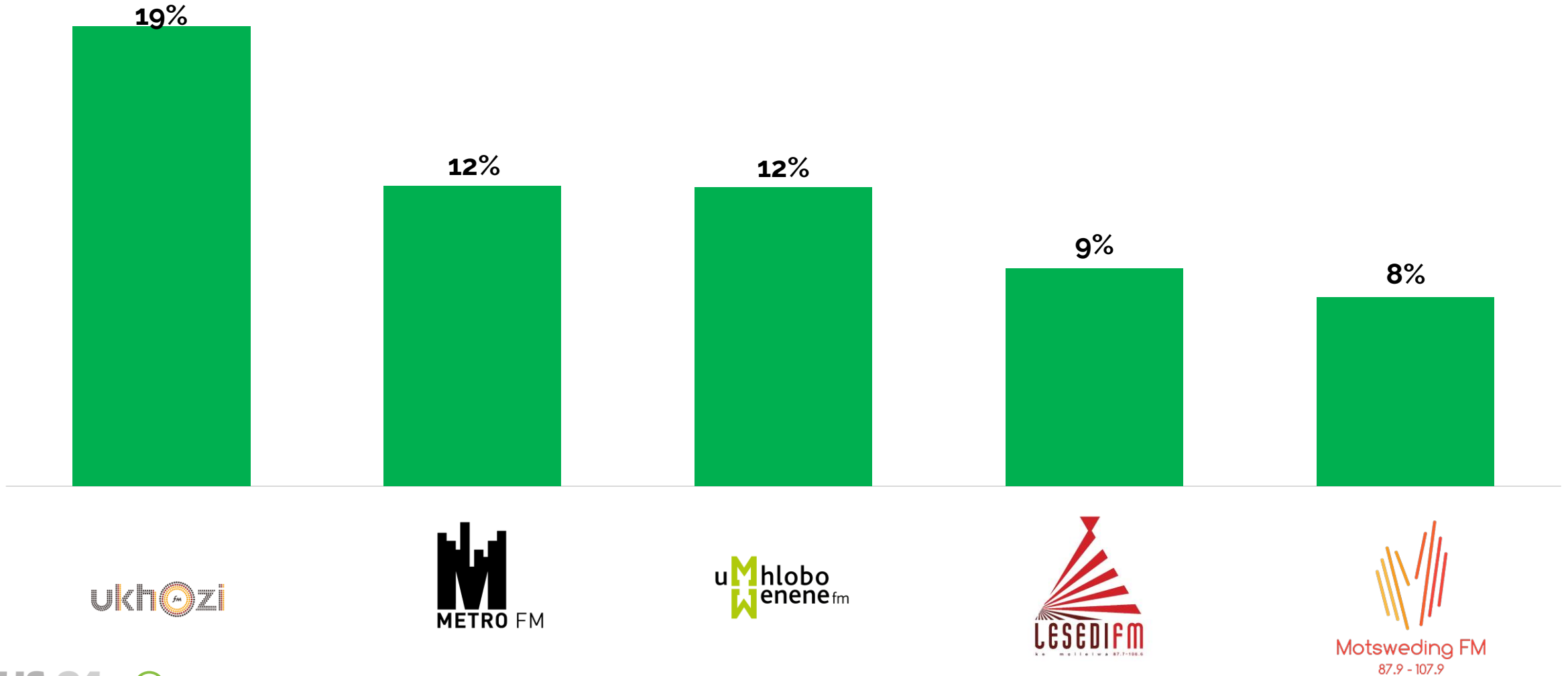
Radio reach



Top Radio Stations Listened to

Past 4 weeks

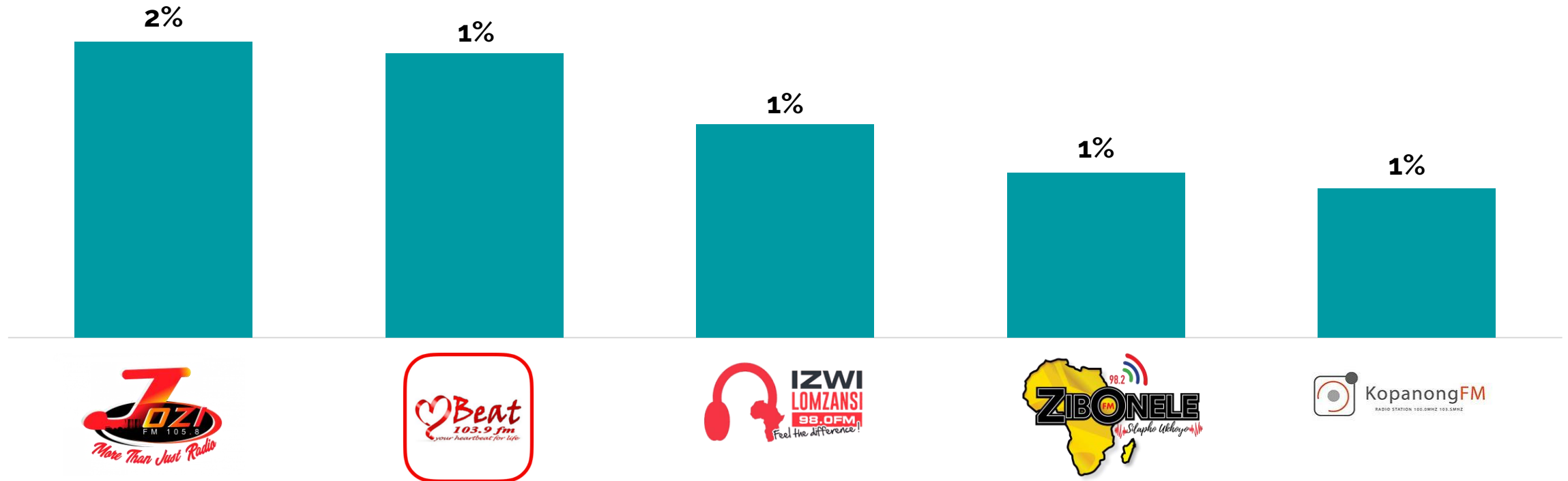
Population Base is **42 573 129**



Top Community Radio Stations Listened to

Past 4 weeks

73% listened to the radio



Access to Out of Home Advertising

72% respondents left their homes to go somewhere in the past 7 days

Top 3 primary methods of transport used

34%



Walking

29%



Minibus taxi

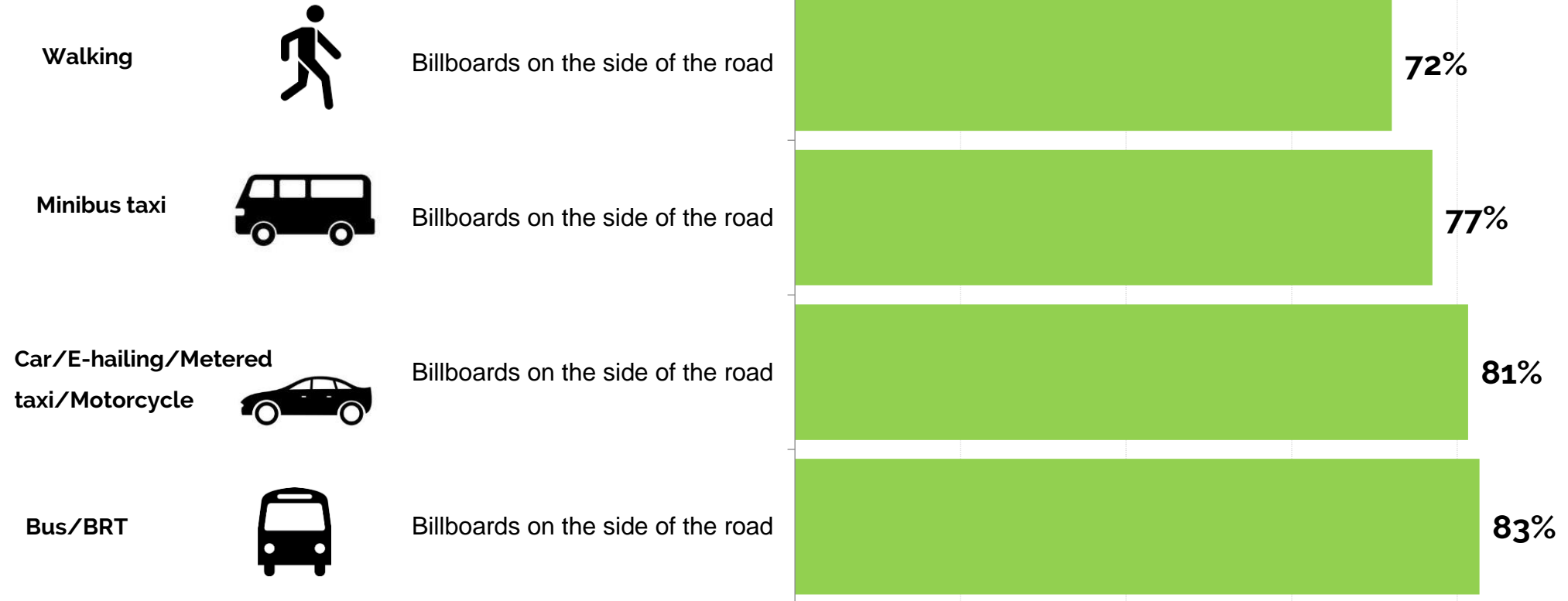
27%



Car

Most Viewed Advertising Signs

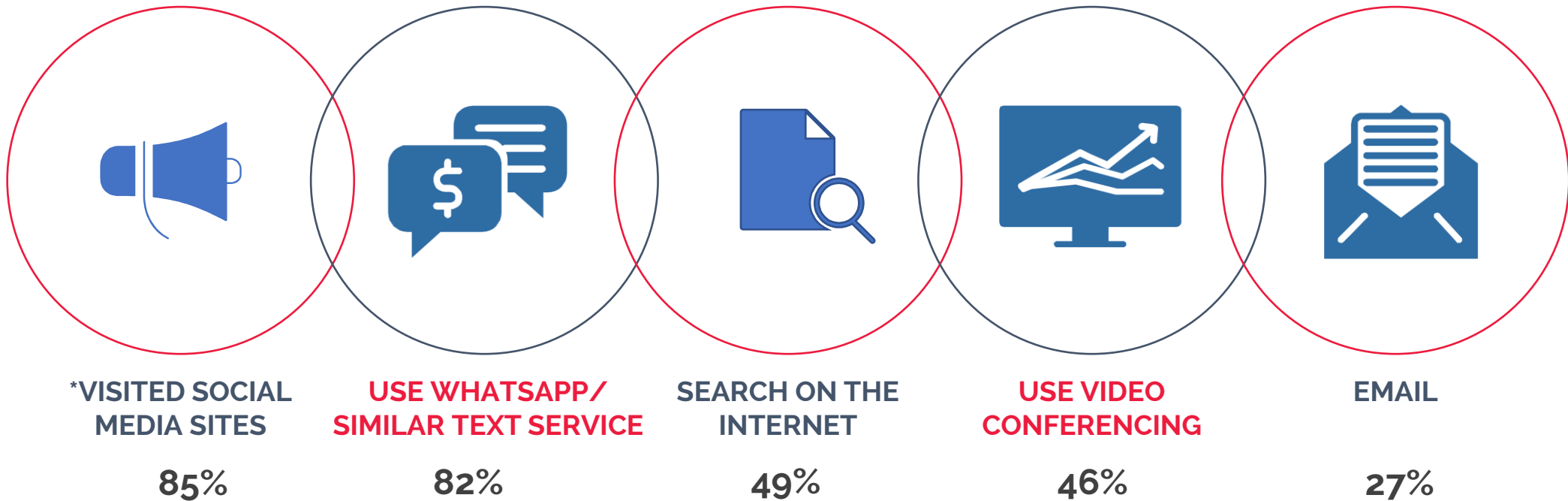
Past 4 weeks



Top 5 Internet Activities

53% respondents have internet access

When last, apart from today, did you do any of these activities on the internet?
YESTERDAY



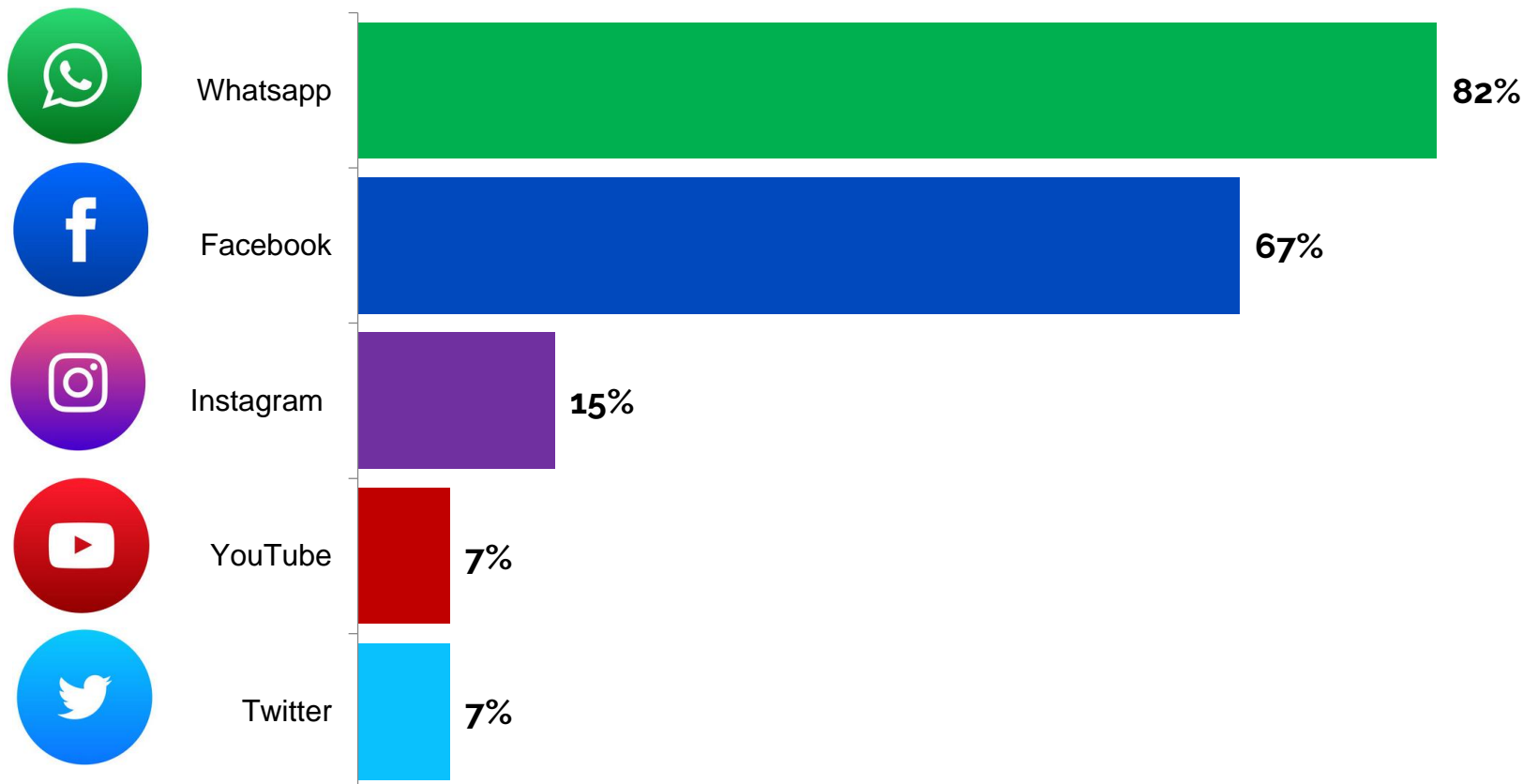
*72% Excl WhatsApp

Top 5 Social Media Sites Visited

Yesterday

45% respondents visited a social media site yesterday

Social Media Sites Visited





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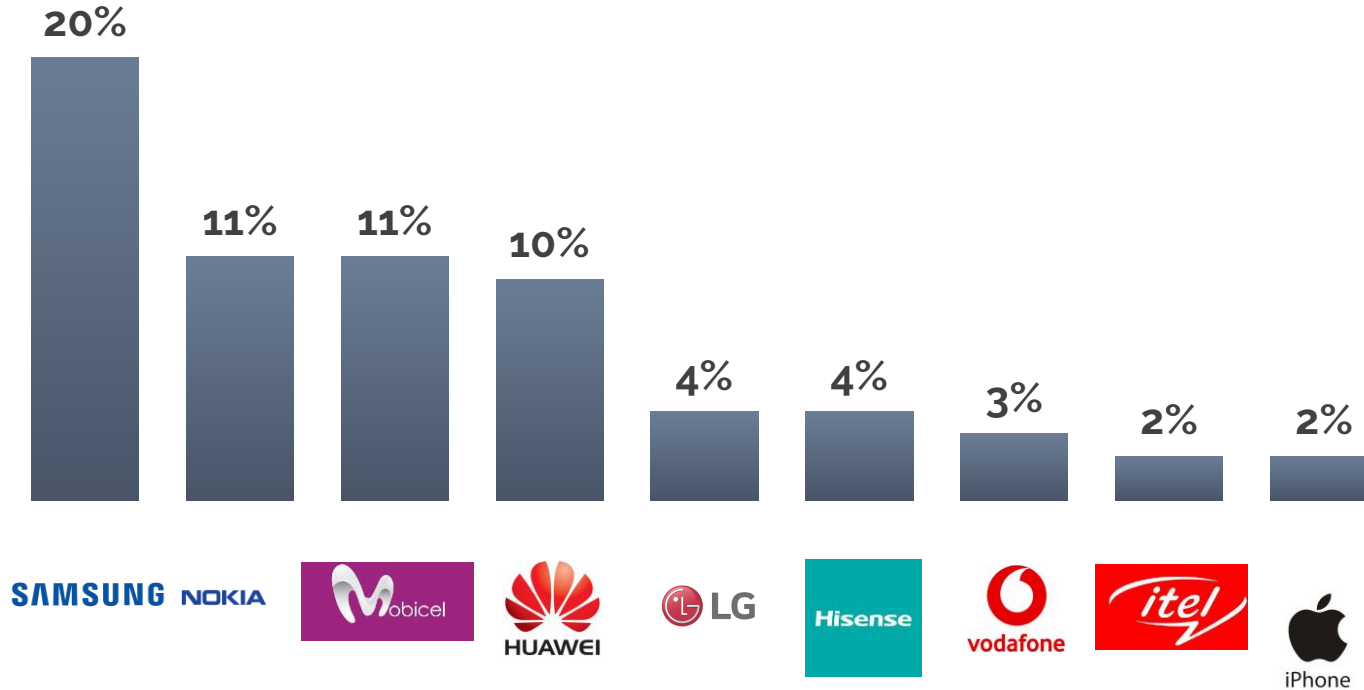
CELLPHONES & HOUSEHOLD ENTERTAINMENT

PLUS 94
RESEARCH

Top Cellphone Brands Used

95% respondents own cellphones

Brands of Cellphones Used




Cell phone access: **95%**



Average number of cell phones in household:

3.7



Average number of cell phones used by an individual:

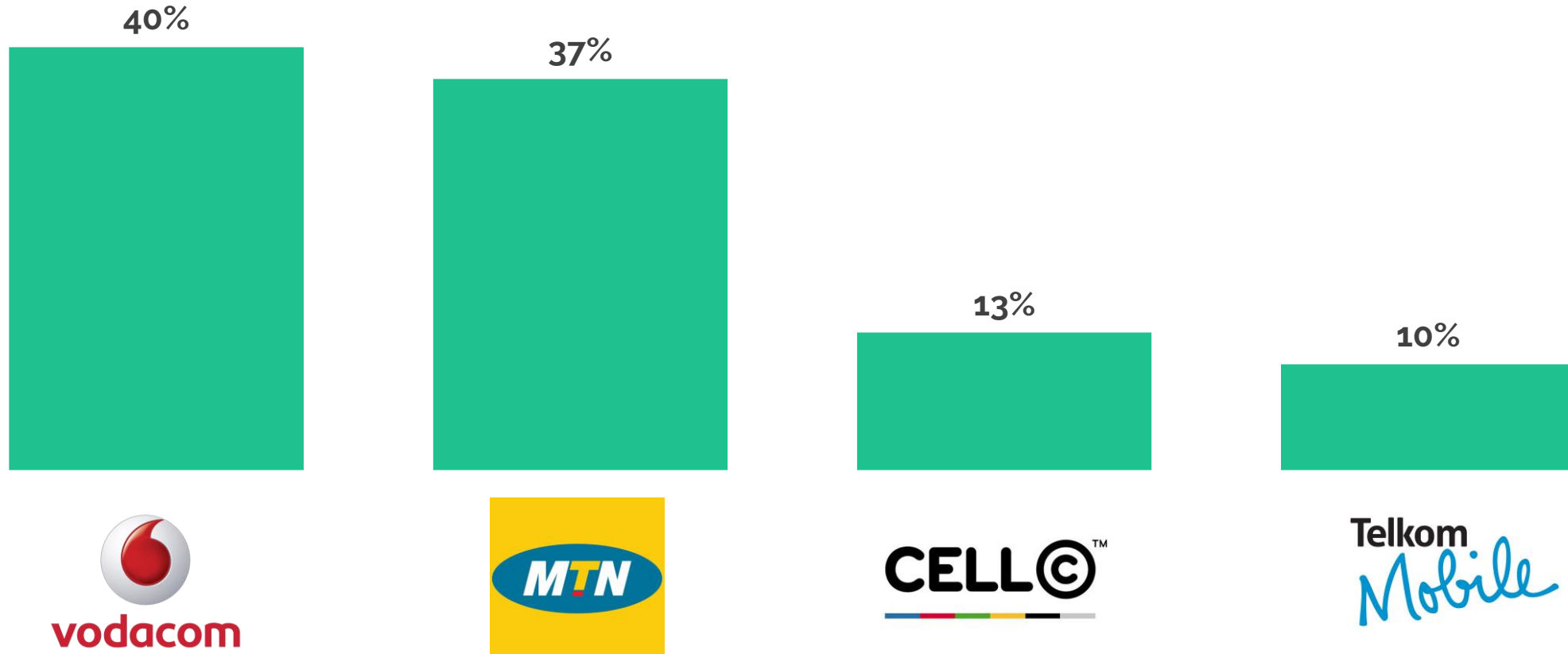
1.1



Top 4 Cellular Networks

95% respondents own cellphones

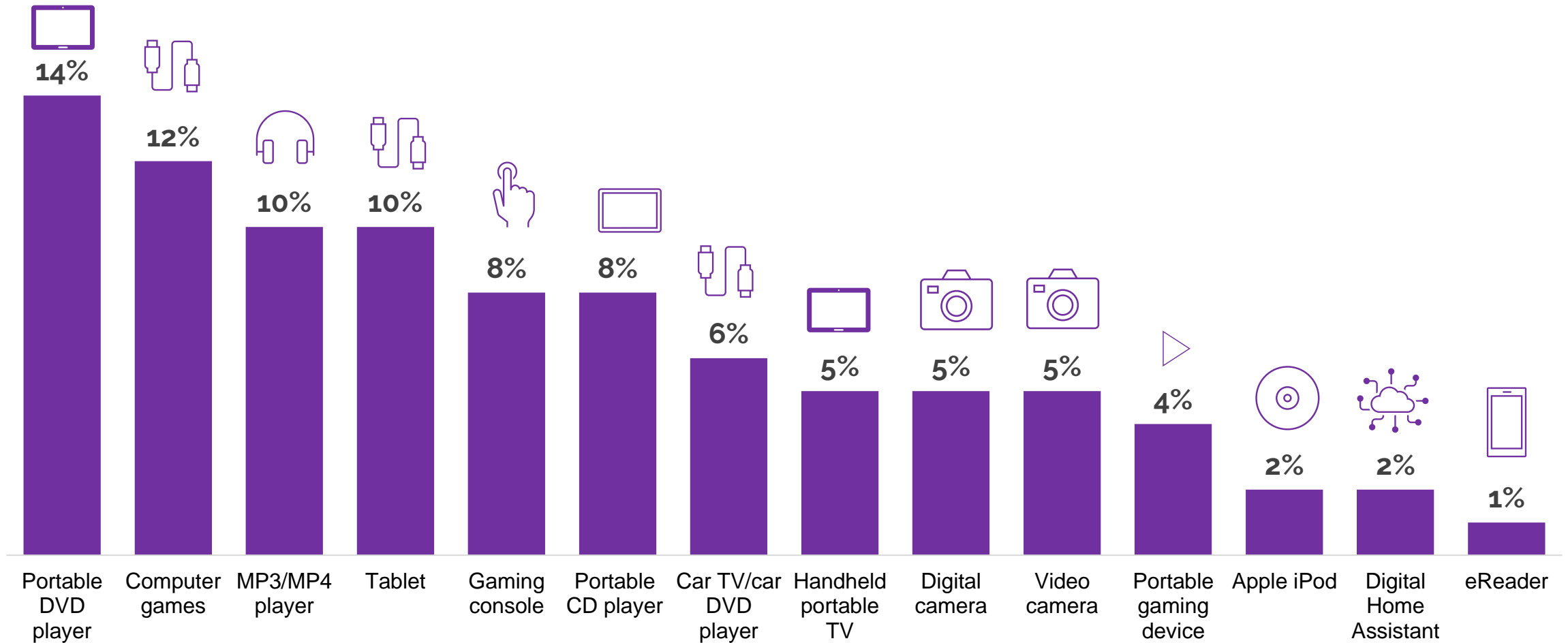
What network primary cell phone is linked to?



Entertainment in the Household

Population Base is **42 573 129**

Which of the following, if any, do you personally own or have access to?



FINANCIAL SERVICES

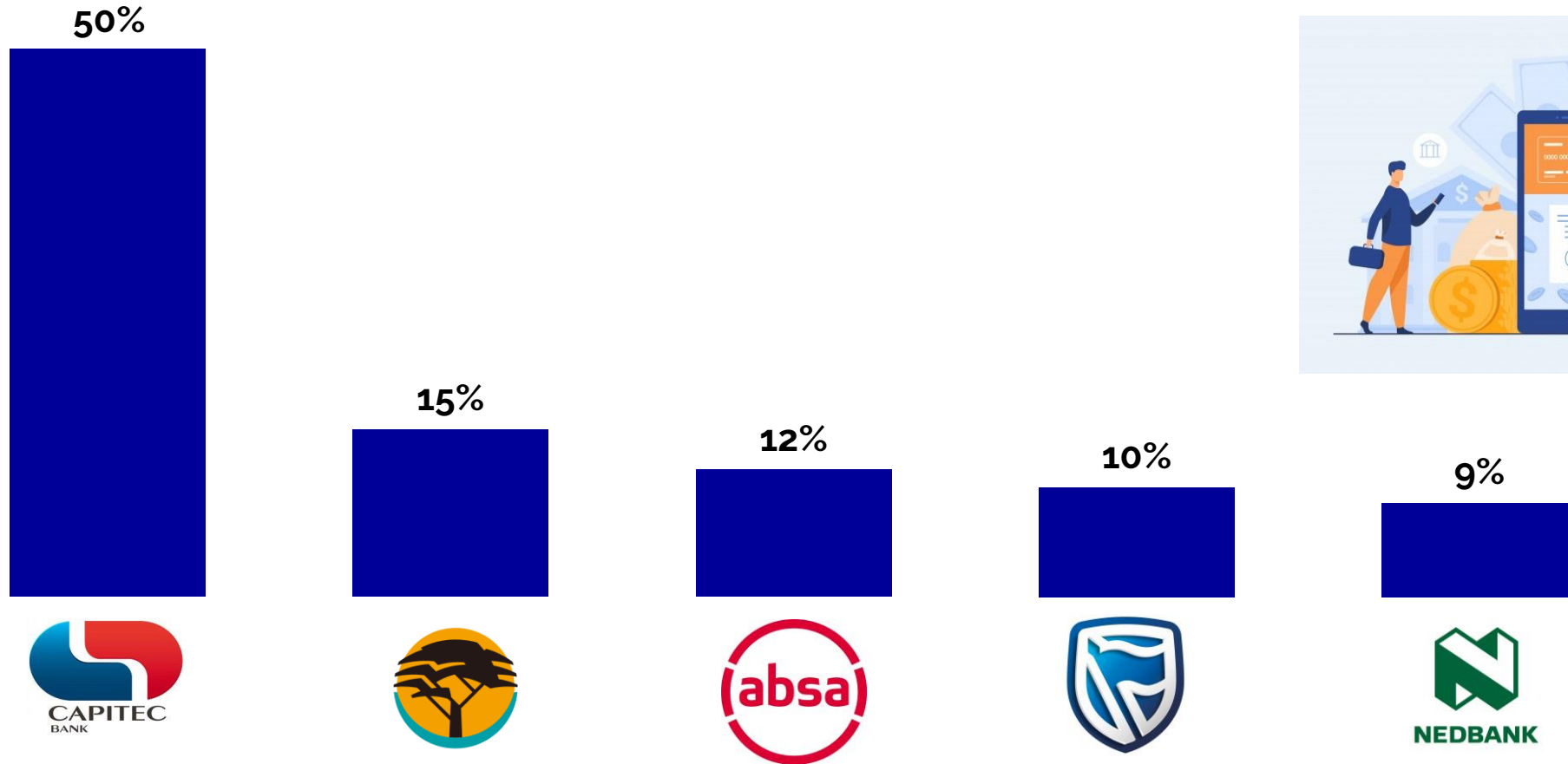
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RESEARCH



Top 5 Primary Banks Used

45% of the population are banked

What bank account is your salary paid into?

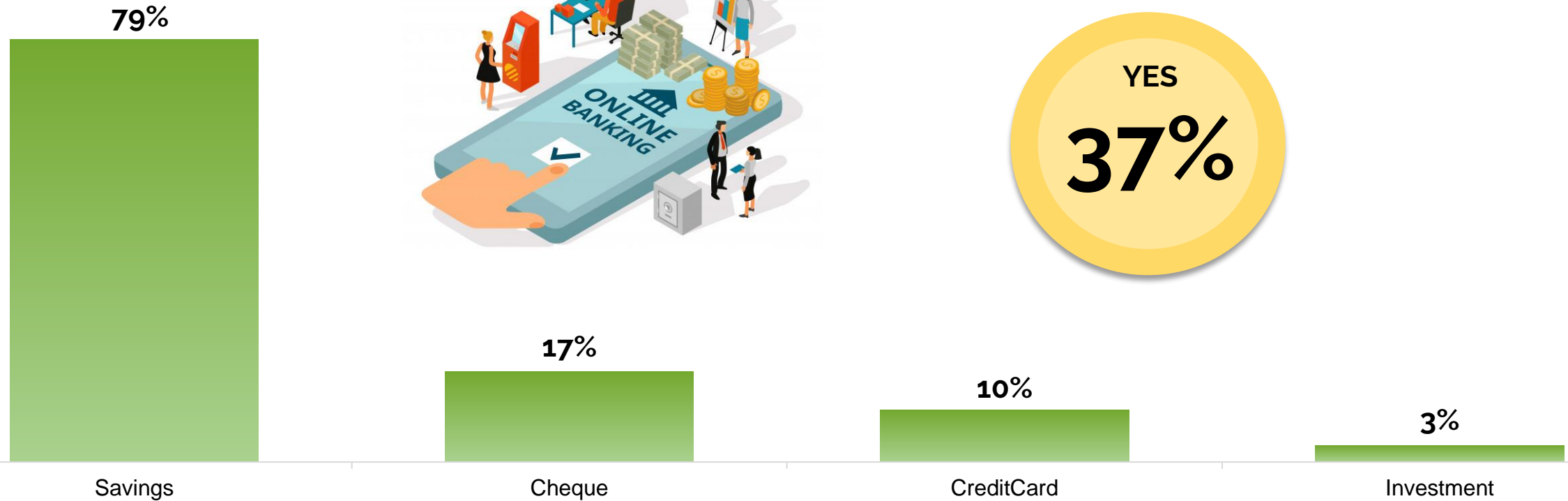
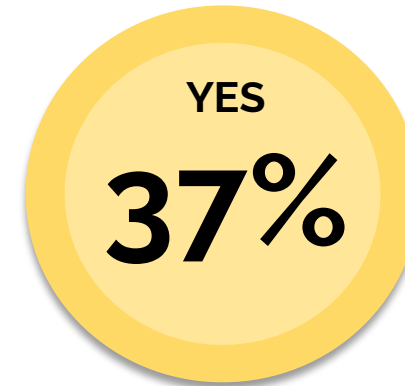


Top Financial Services Used

45% of the population are banked



Online banking users
past 4 weeks:

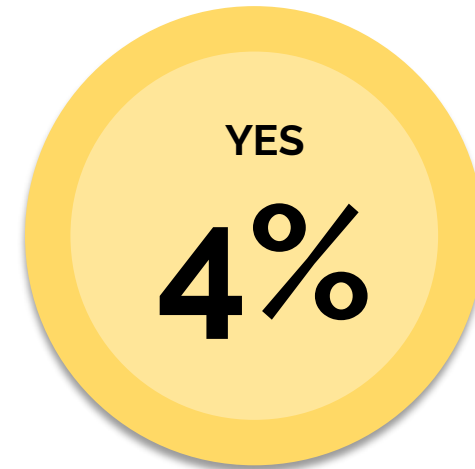


Short-Term Insurance Usage

Population Base is **42 573 129**



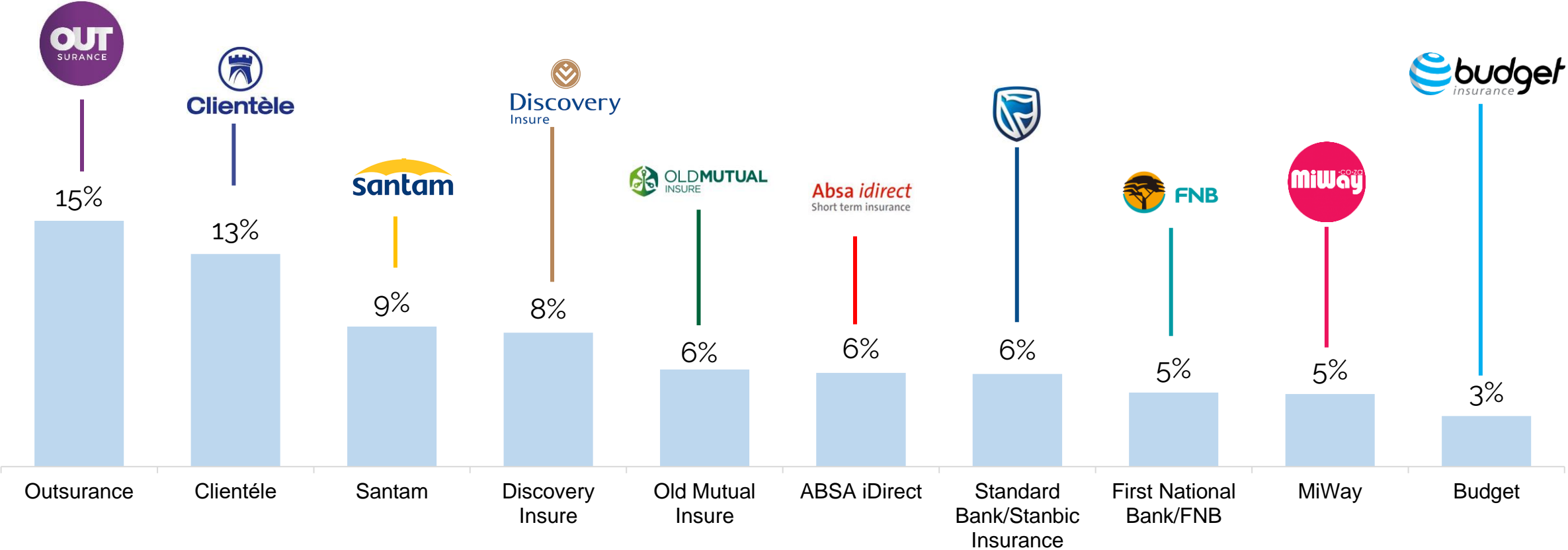
Do you have a short-term insurance policy?



Short-Term Insurance Usage: Top 10 Providers

4% have short term insurance

Companies with which short-term insurance is held



*Includes respondents that claimed Mutual & Federal

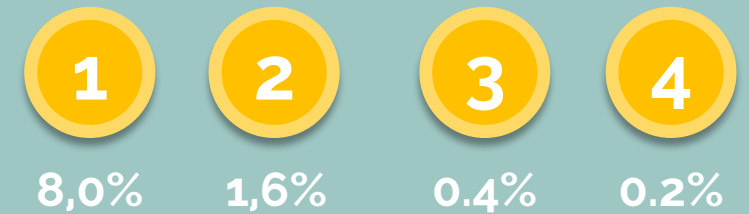
Sample size: **1 454 437**

Results are based on a respondent base of 10 024

Do you belong
to a Stokvel?



How many stokvels
do you belong to?



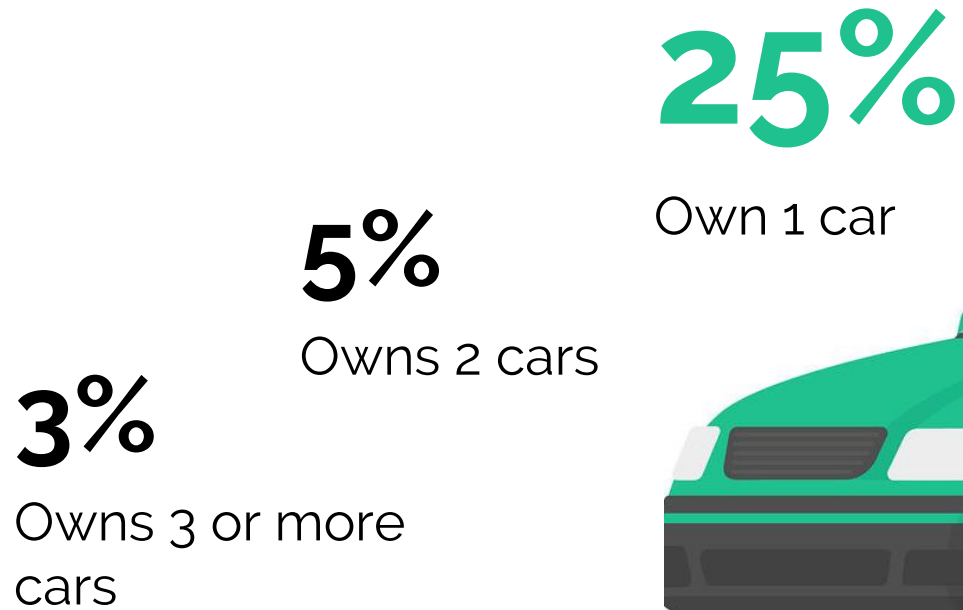
AUTOMOTIVE

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RESEARCH



Motor Vehicles Per Household

33% of households have motor vehicles

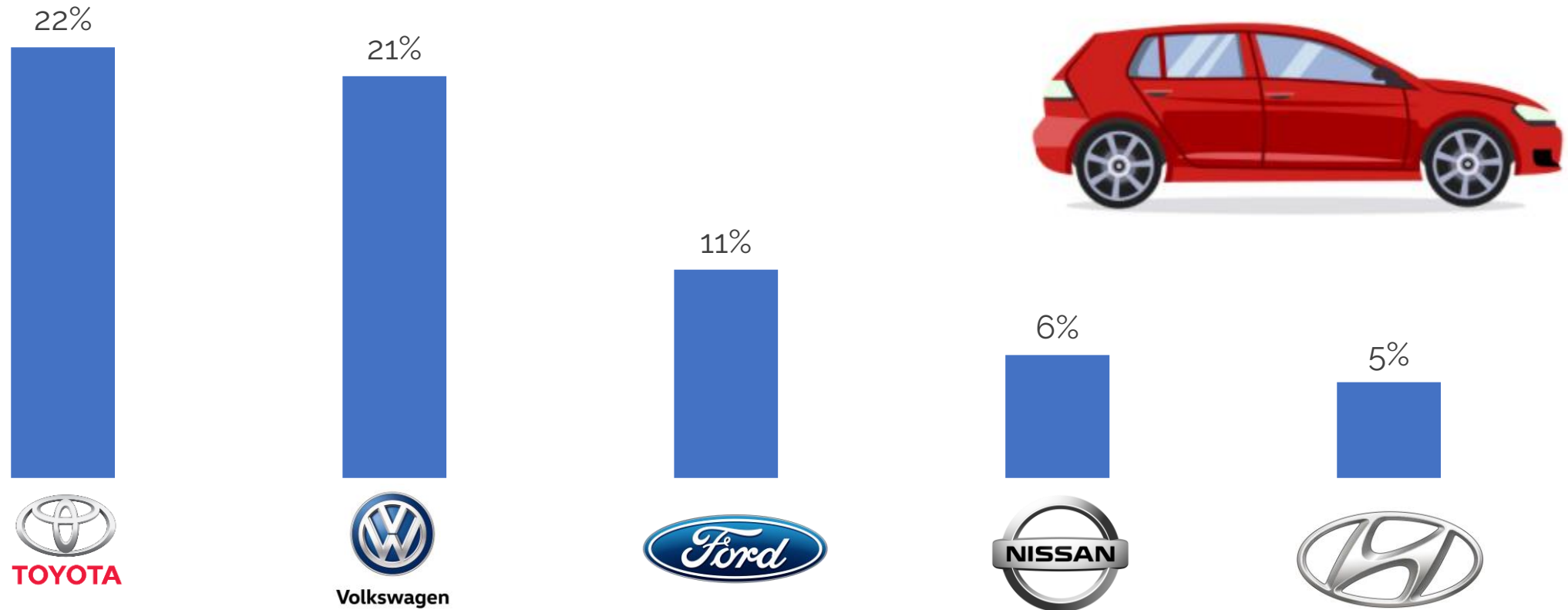


Sample size: **17,163 million households**

Top Car Brands Driven

89% of vehicle owners personally drive their cars

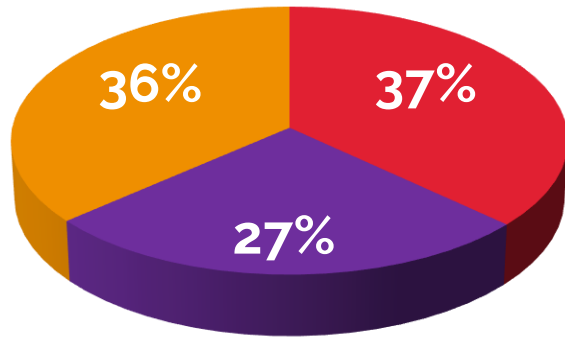
What is the make of vehicle that you personally drive the most?



RETAIL

Household Purchase Behaviour

Purchase Responsibility



■ Wholly ■ Partly ■ Not



Frequency of Purchase

41%

Do one bulk shop a month and fill ups

9%

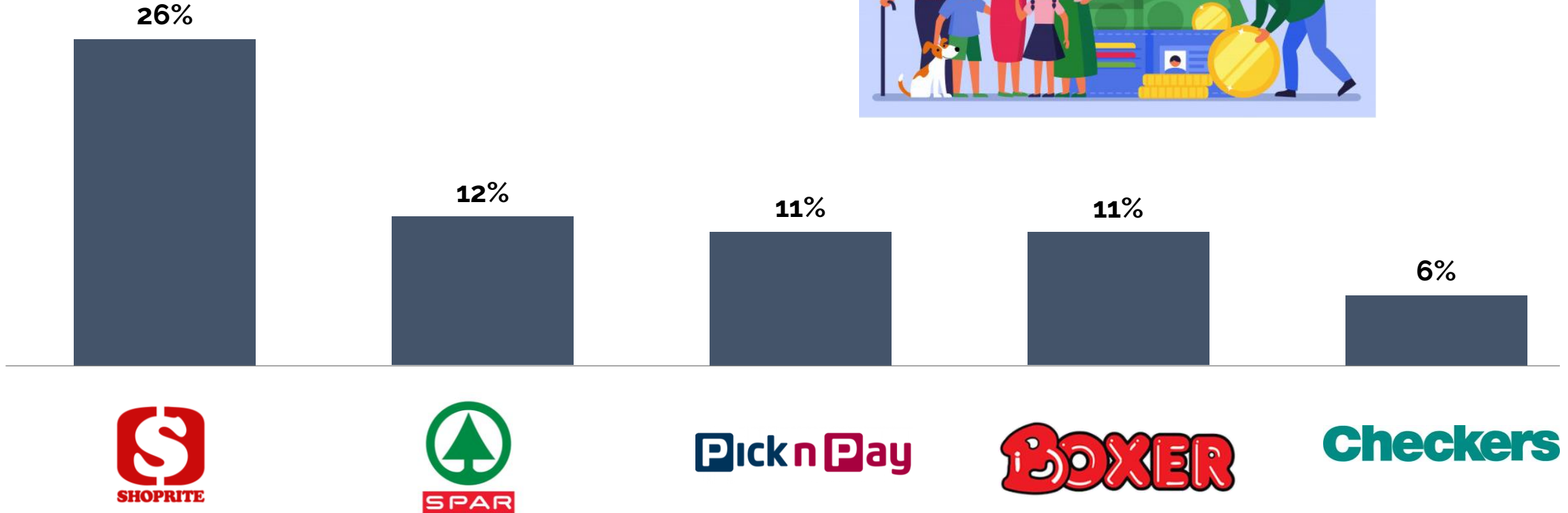
Shop twice a month/every 2 weeks

7%

Do one bulk shop annually and fill-ups

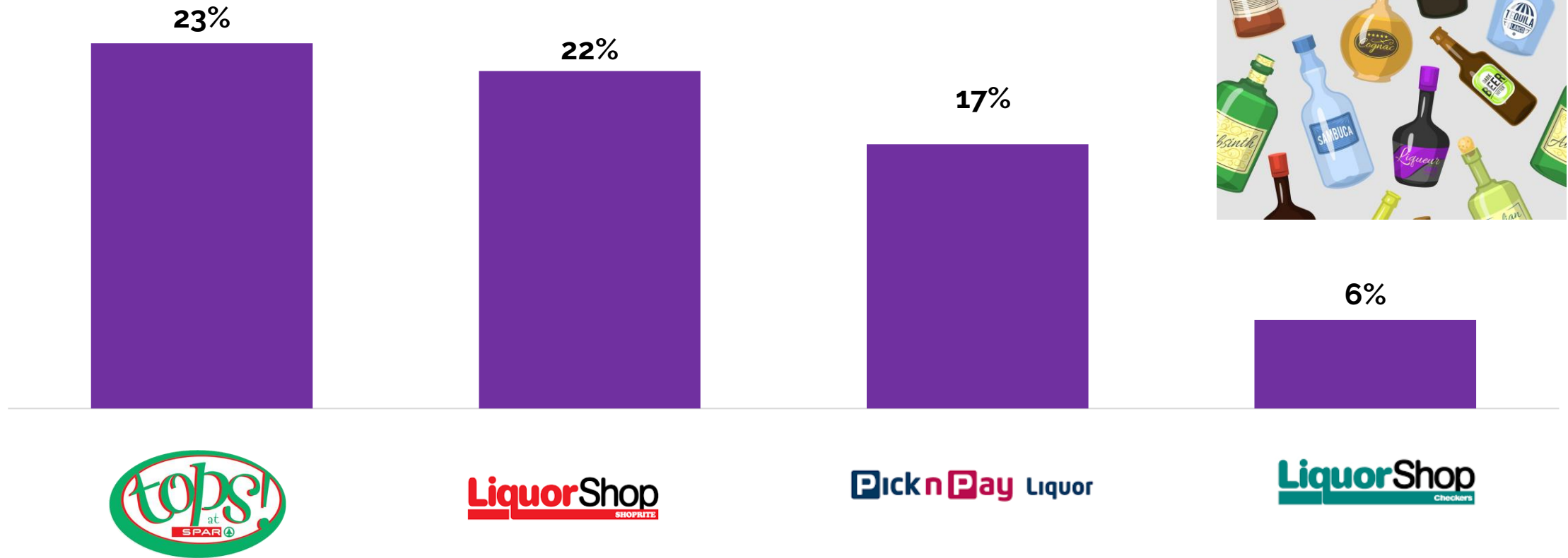


Top Food and Grocery Retailers



Top Liquor Stores

Past 4 weeks



CLOTHING AND SHOES

Clothing Purchases

Past 3 months



Have you bought any of the following items in the past 3 months?



Women's inner items

12%



Women's outer items

16%



Children's inner items

13%



Children's outer items

20%



Men's inner items

11%



Men's outer items

17%

None
52%



Clothing Purchases: Top Stores

Past 3 months



Where have you purchased clothing?

Women



Men



Children

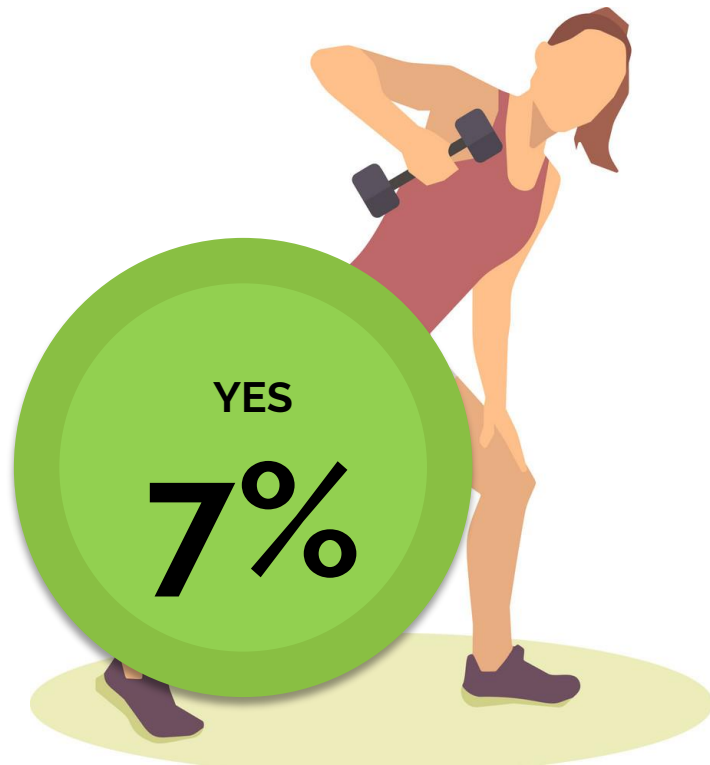


Sport/Outdoor Clothing and Shoe Purchases

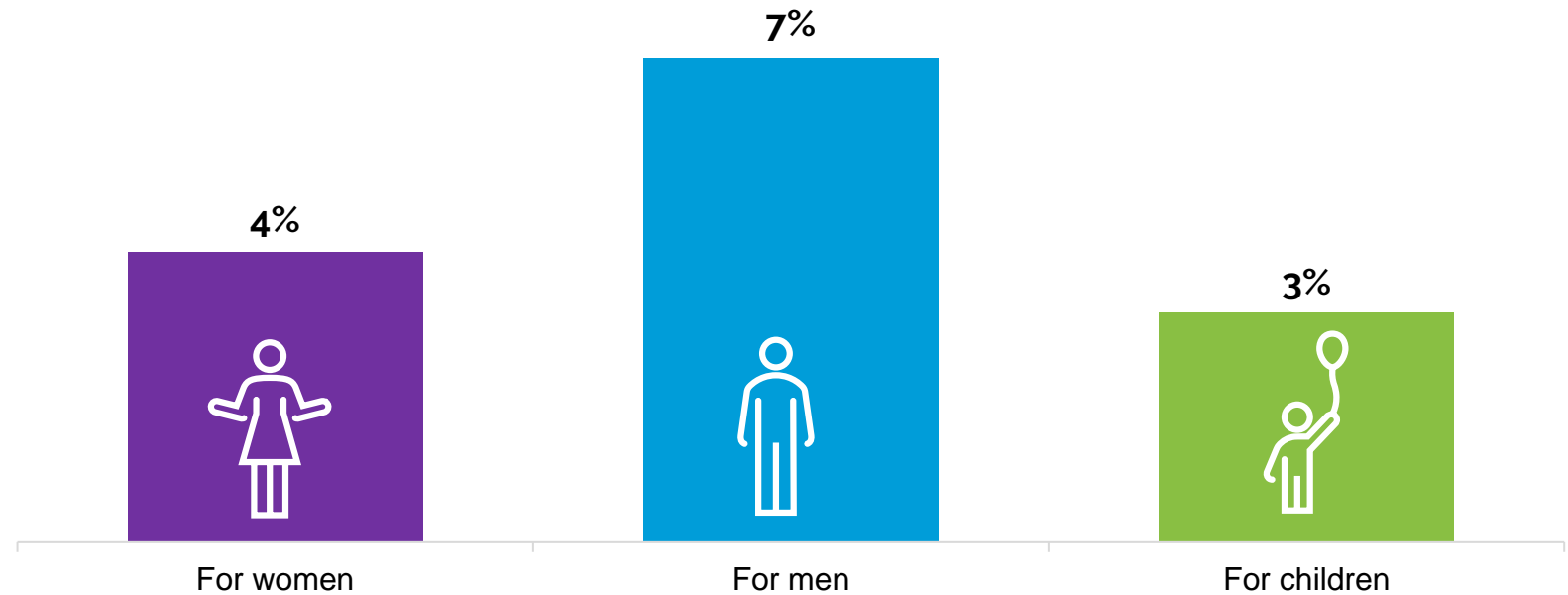
Past 3 months

Population Base is **42 573 129**

Bought Sport or Outdoor clothing?



Bought sport, exercise or outdoor shoes?



Outdoor Shoe Purchases: Top Stores

Past 3 months



Where have you purchased clothing?

Women

Men

Children

sportscene 24%

sportscene 19%

TOTALSPORTS 18%


Mr Price 20%

TOTALSPORTS 17%

ACKERMANS 17%


mrp sport 11%

studio 8%

PEP 12%

MALLS

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Top Malls Visited

Top 3 Malls Per Province in the Past 4 Weeks



Population Base is **42 573 129**

Free State

1. Mimosa Mall
2. Goldfields Mall
3. Loch Logan Waterfront

Limpopo

1. Thavhani Mall
2. Mall of the North
3. Elim Shopping Centre

North West

1. Lichtenburg Mall
2. Waterfall Mall

Northern Cape

1. Diamond Pavillion Shopping Centre

Gauteng

1. Maponya Mall
2. Eastgate Shopping Centre
3. Southgate Mall

Kwa-Zulu Natal

1. Gateway
2. The Pavilion
3. Galleria Shopping Centre

Western Cape

1. Liberty Promenade
2. Canal Walk
3. Parrow Centre

Mpumalanga

1. Tonga Mall
2. Riverside Mall

Eastern Cape

1. Gillwell Mall
2. Greenacres Shopping Centre
3. BT Ngebs City Shopping Centre



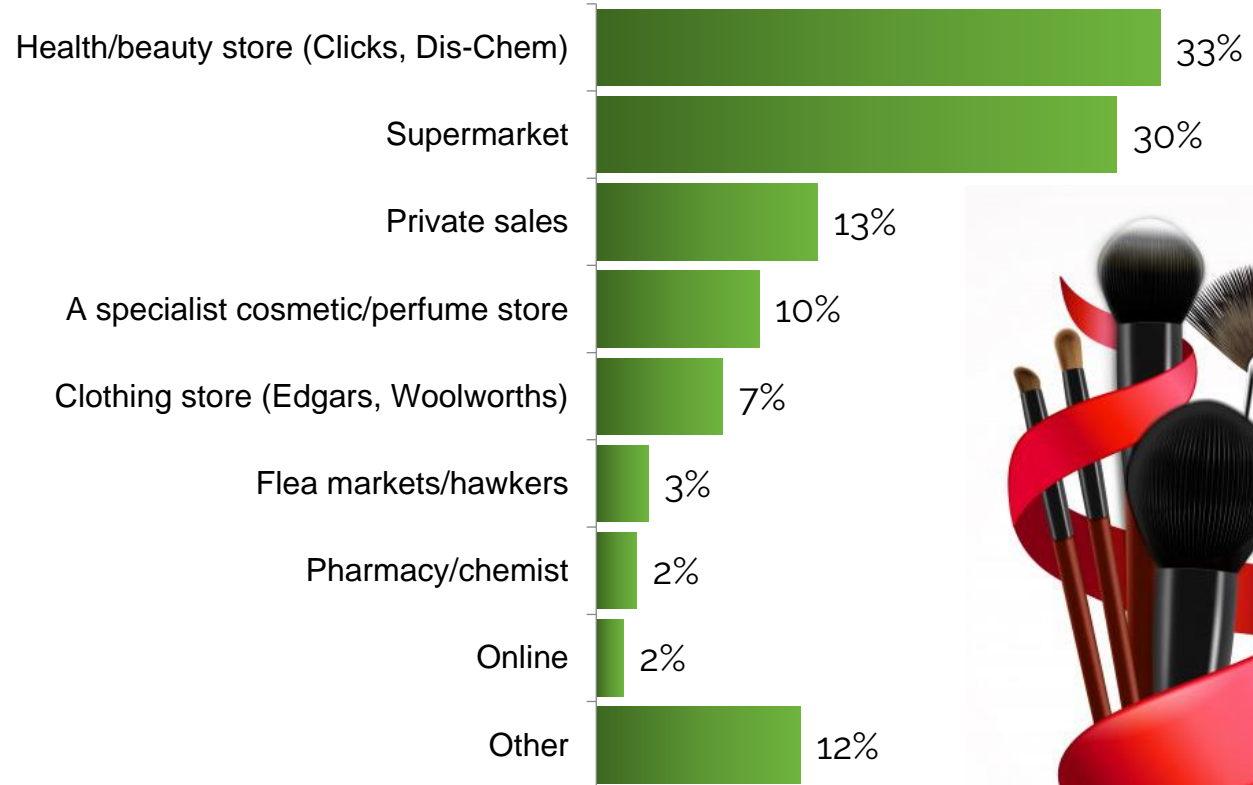
COSMETICS



Cosmetics Purchases



Where do you usually buy these cosmetic products?



Population Base is **22 098 155**

Population Base is **11 543 355**

GROCERIES

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RESEARCH



Product Penetration

Dairy



PAST 4 WEEKS

Coffee/tea creamer	70%
Long-life milk	61%
Cheese	60%

PAST 7 DAYS

Fresh milk	65%
Yoghurt (including drinking yoghurt)	60%
Brick Margarine/Butter	60%
Tub Margarine/Butter	57%
Powdered milk	28%



Basic/Staple Food



PAST 4 WEEKS

Rice	88%
Flour	64%
Brown Sugar	64%
Mealie meal	61%
Pasta	61%
White Sugar	58%
Porridge	46%

PAST 7 DAYS

Bread	88%
-------	-----



Product Penetration



*Alcohol



PAST 7 DAYS

Beer	23%
Ciders	22%
Lite/light beer	20%
Vodka	13%
Whiskey	12%
Brandy	10%
Wine (bottles)	13%
Wine (boxes)	17%
Alcohol free	6%

Toiletries



PAST 4 WEEKS

Toothpaste	93%
Hand/body Soap	87%

PAST 7 DAYS

Body cream/lotion	88%
Anti-perspirant roll on	87%
Aerosol deodorant/anti-perspirant	61%
Bath additives	28%
Liquid body washes/shower gels	27%
Hair conditioner	23%
Hair styling products	22%



BEHAVIOUR



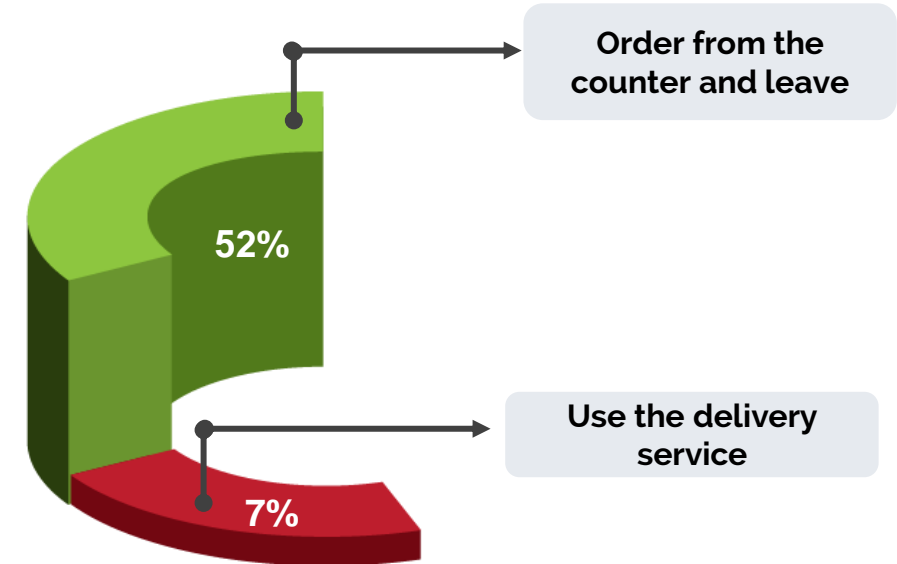
Behaviour: Fast food

How often do you usually buy food from a fast food/casual dining outlet?



Population Base is **41 171 021**

How do you purchase take-aways?



Population Base is **33 681 130**

Brand Loyalty



Do you always buy the same brands?

YES
41%

Groceries

40%

Toiletries

31%

Cosmetics

Would you buy another brand if they were on special/at a reduced price?

YES
45%

Groceries

33%

Toiletries

19%

Cosmetics

If your brand is not on the shelf, would you buy another brand ...?

YES
30%

Groceries

22%

Toiletries

16%

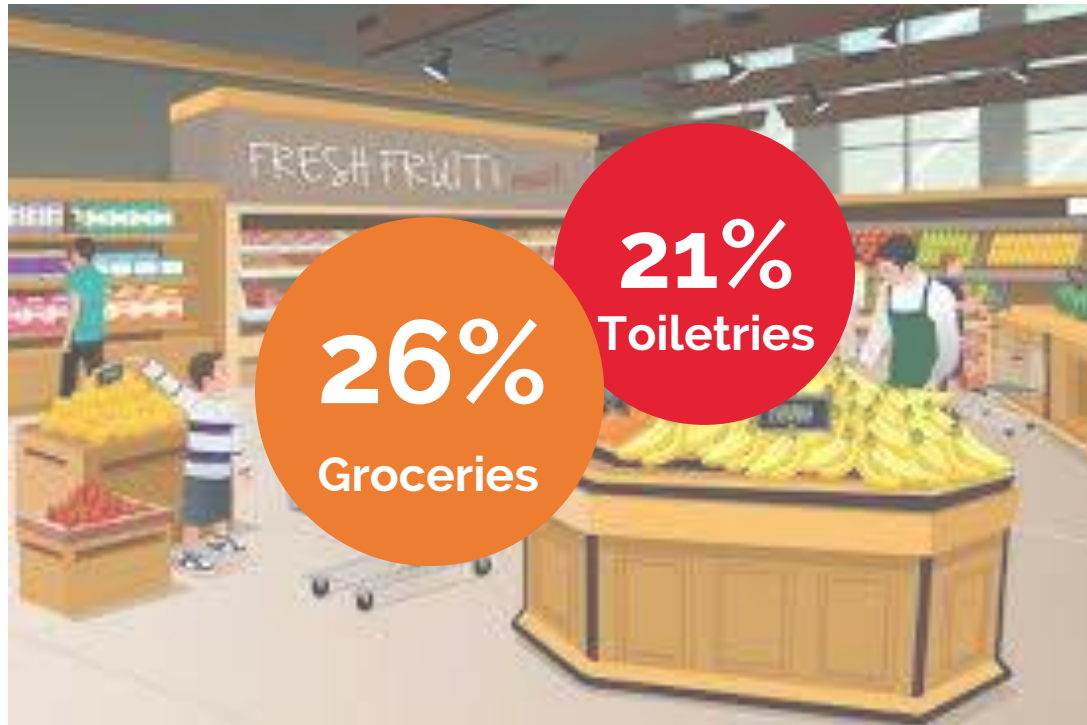
Cosmetics



Brand Loyalty



Do you always go to the same supermarket?



Do you order items online?



Clothing Purchases



When you buy clothing, for yourself/husband/wife/partner or children, do you...?

Only buy branded clothes?



Yourself
23%



Partner
6%



Children
7%

Shop around for bargains?



Yourself
29%



Partner
8%



Children
13%

Buy clothing online?



Yourself
11%



Partner
2%



Children
2%

Population Base is **42 573 129**





INSIGHTS

How can you use the data?



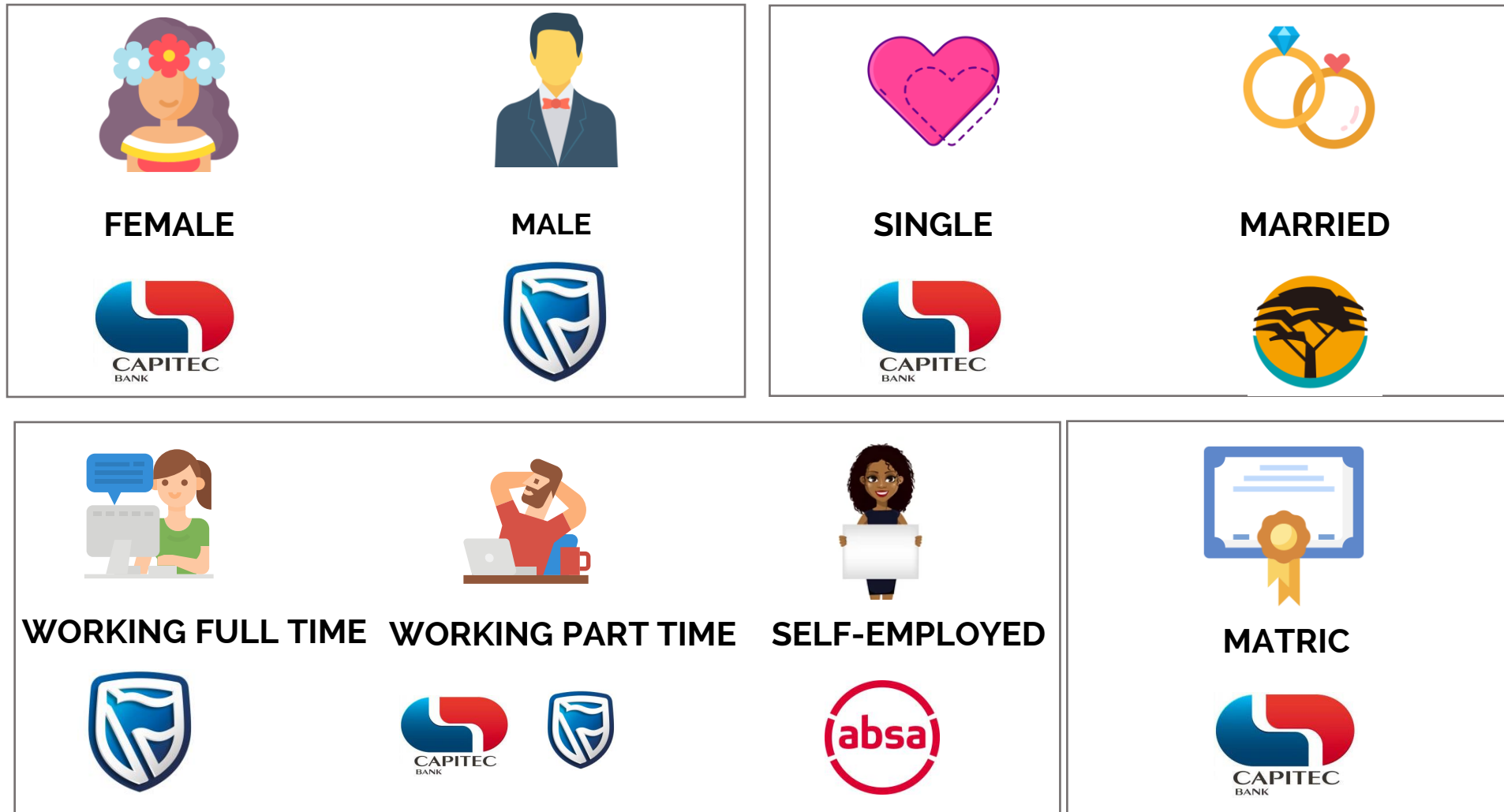
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Preferred Bank Index: By Demographic

Past 4 weeks



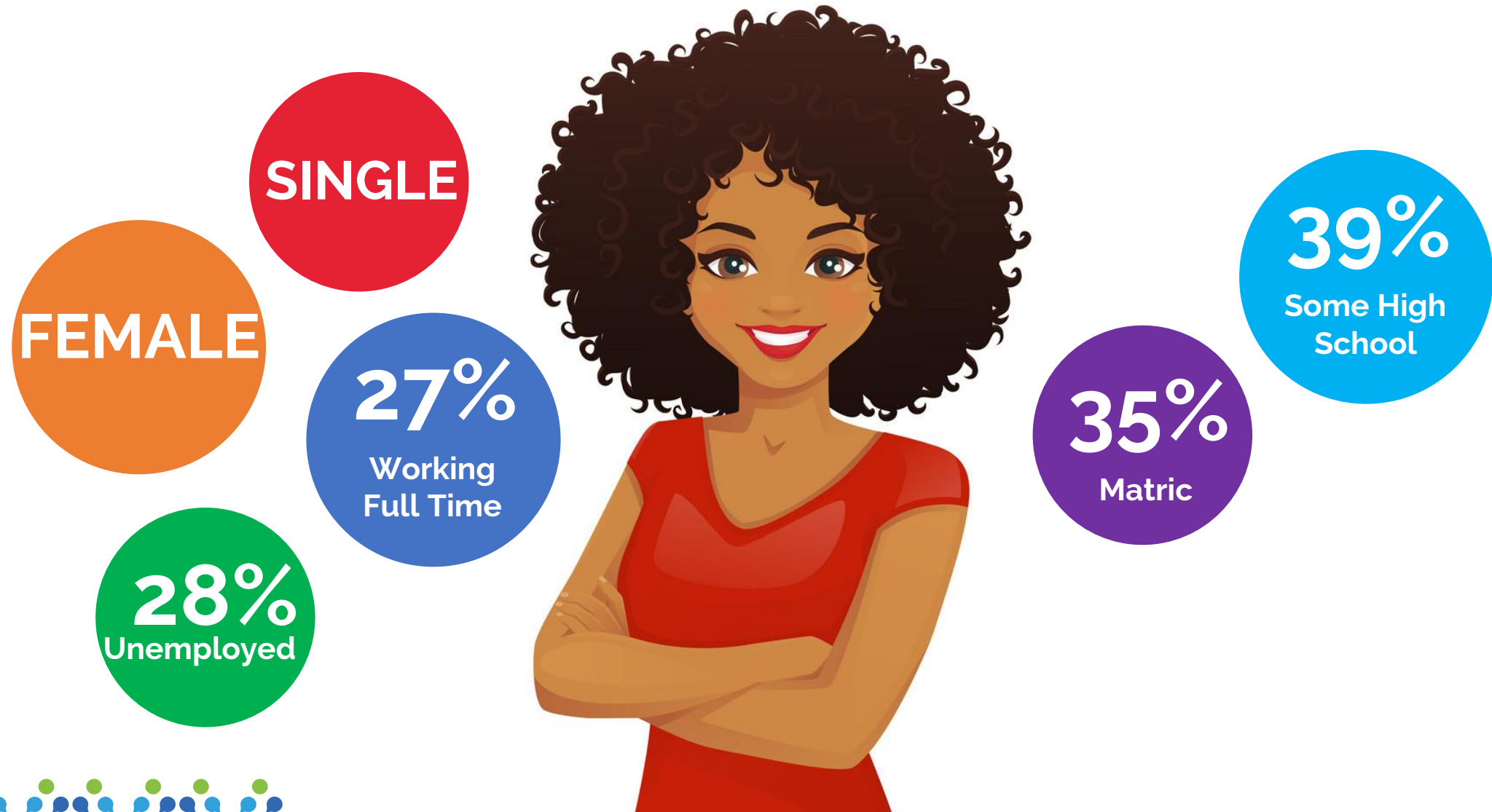
Preferred Liquor Store Index: By Demographic

Past 4 weeks



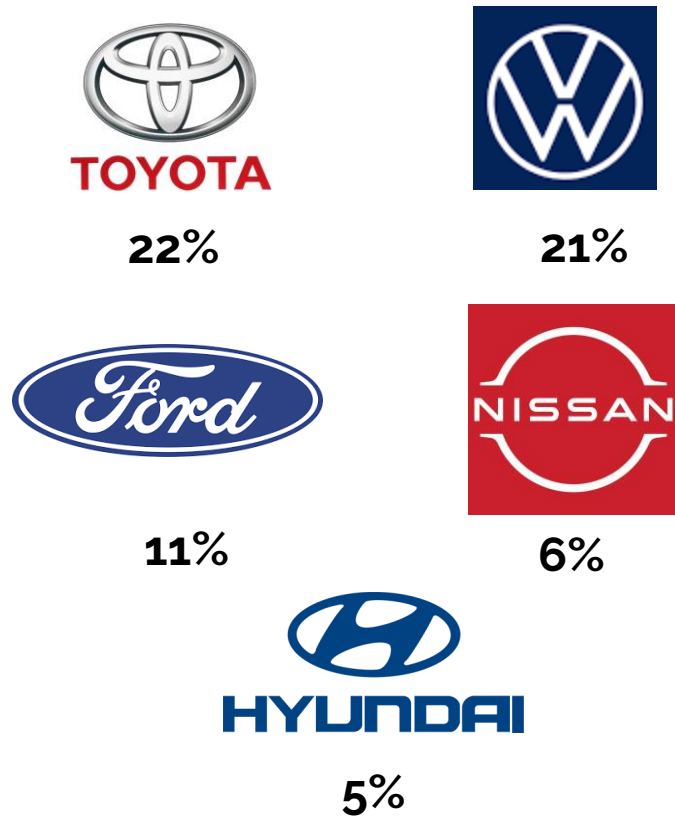
Stokvel Participation Profile

Past 4 weeks

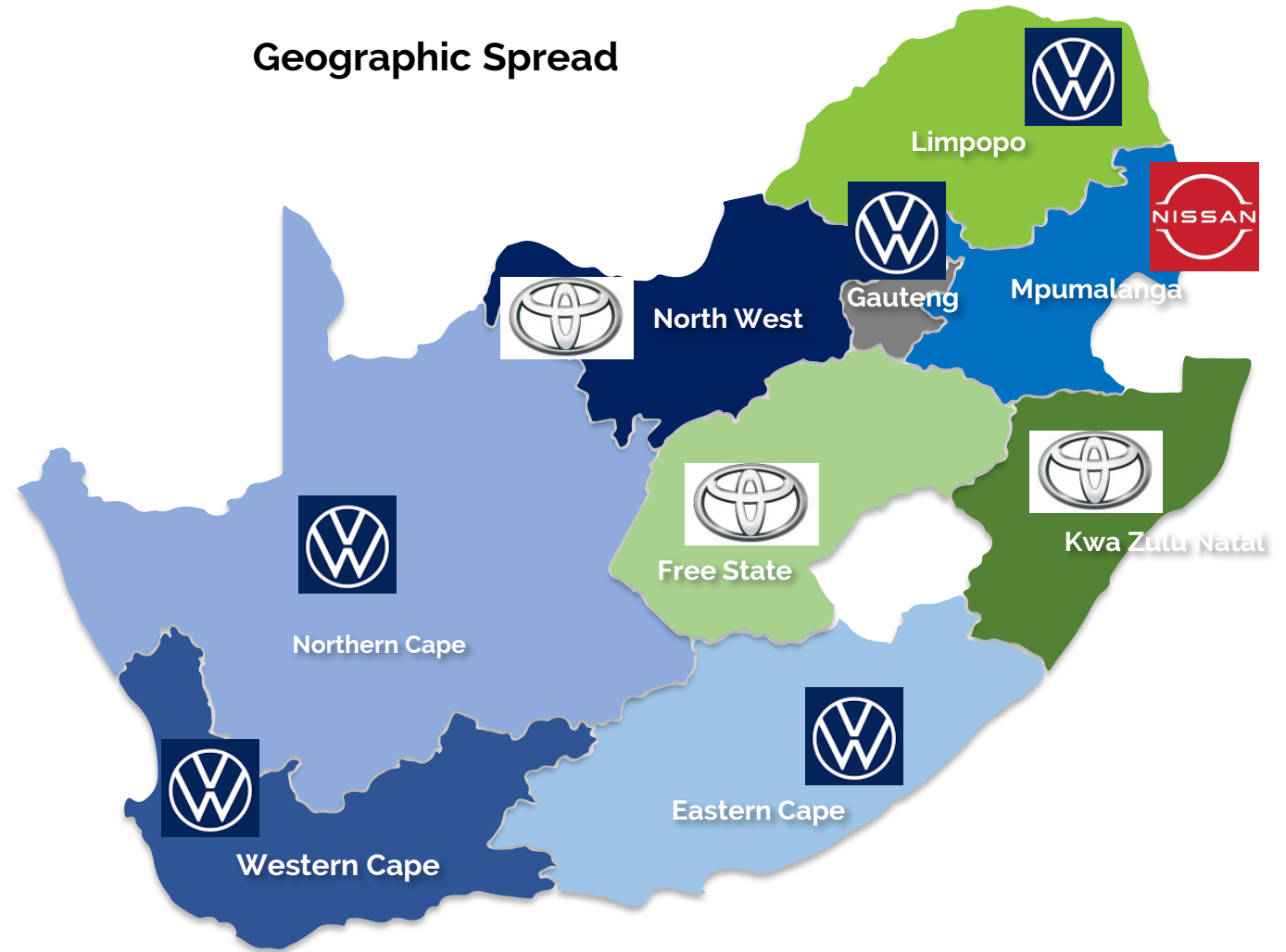


Car Brand Preference: By Geography

Market Share



Geographic Spread



Car Brand Preference: By Demographic

Personal Income



< R 9 000



R 14 000 – R 16 000

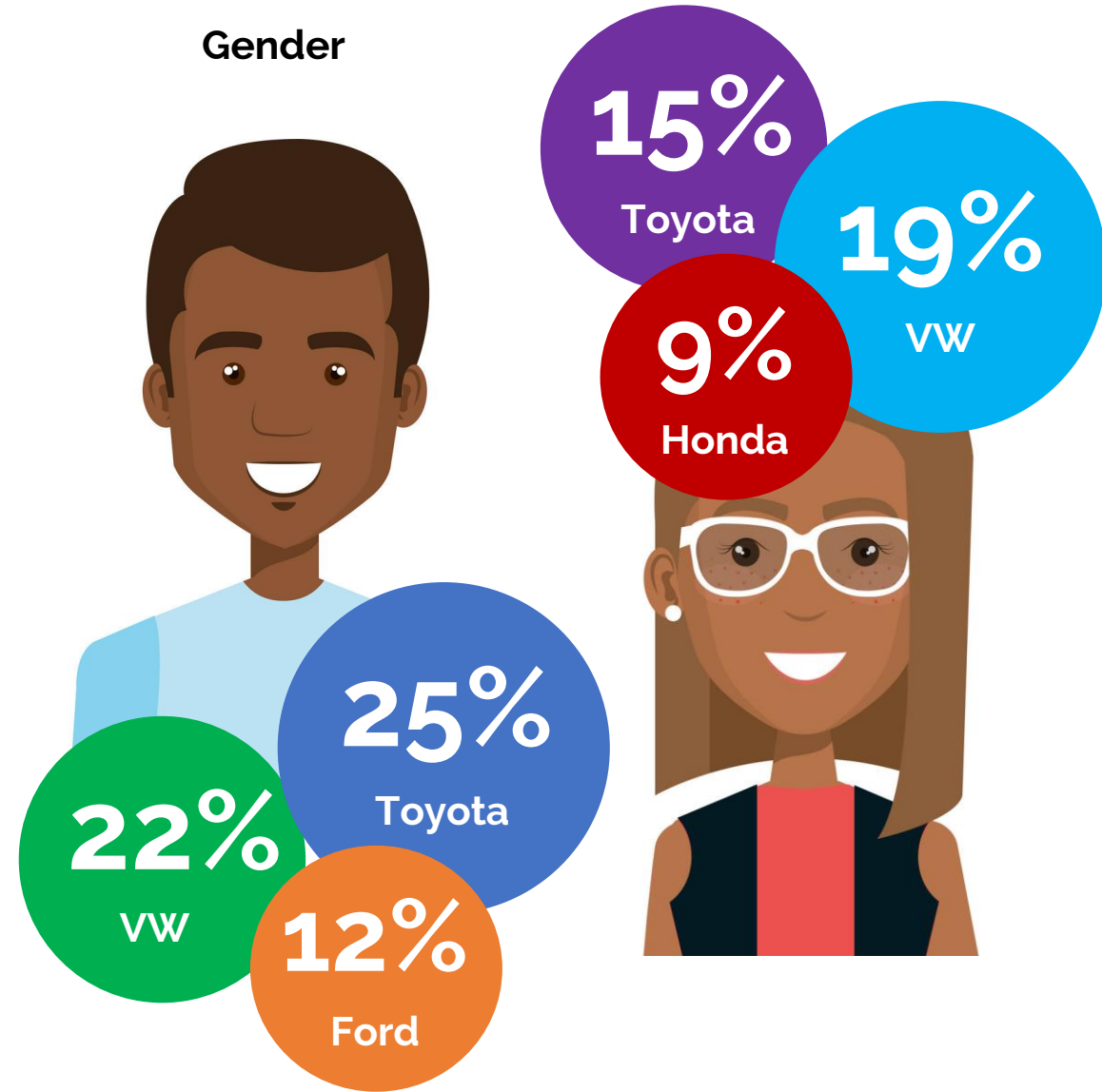


R 21 000 – R24 000



> R 29 000

Gender



Conclusion: What next?

Sep 2020
1st quarterly release

18 March 2021
2nd quarterly release

19 March 2021
• Data Release to subscribers

Oct 2021
4th quarterly release

April/May 2021
• Industry presentations
• Questionnaire review

June 2021
3rd quarterly release

March 2022
1st calendar year data release





THANK
YOU



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