



MARKETING RESEARCH
FOUNDATION

MAPS DATA OVERVIEW:

Cycle 1 – Cycle 3

Jul '20 – Mar '21

PLUS 94
RESEARCH

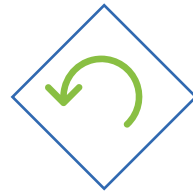


Important Definitions



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 1 667 by 12 equals 20 004 interviews. Three dips make a cycle of 5001 interviews, and 2 cycles make a Wave of 10 002 interviews.

Cycles one, two, and three of MAPS fieldwork were conducted and a sample of 15 040 face-to-face interviews and 7 792 leave behind questionnaires (diaries) were administered.

Given the unpredictable nature of the trajectory of Lockdowns some dips may have fewer fieldwork days. And this is likely to affect the diary collection response rate. 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.




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

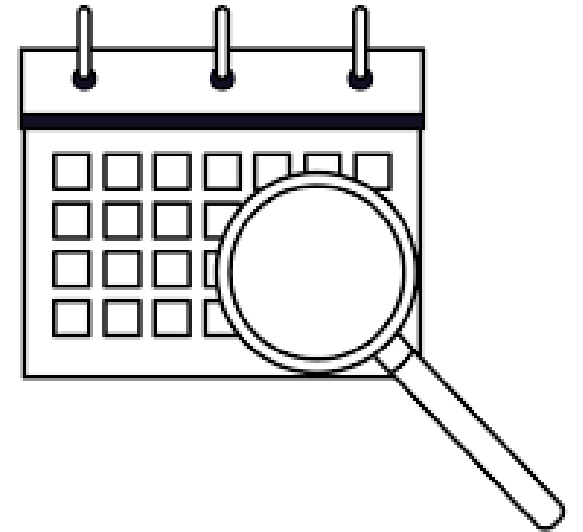
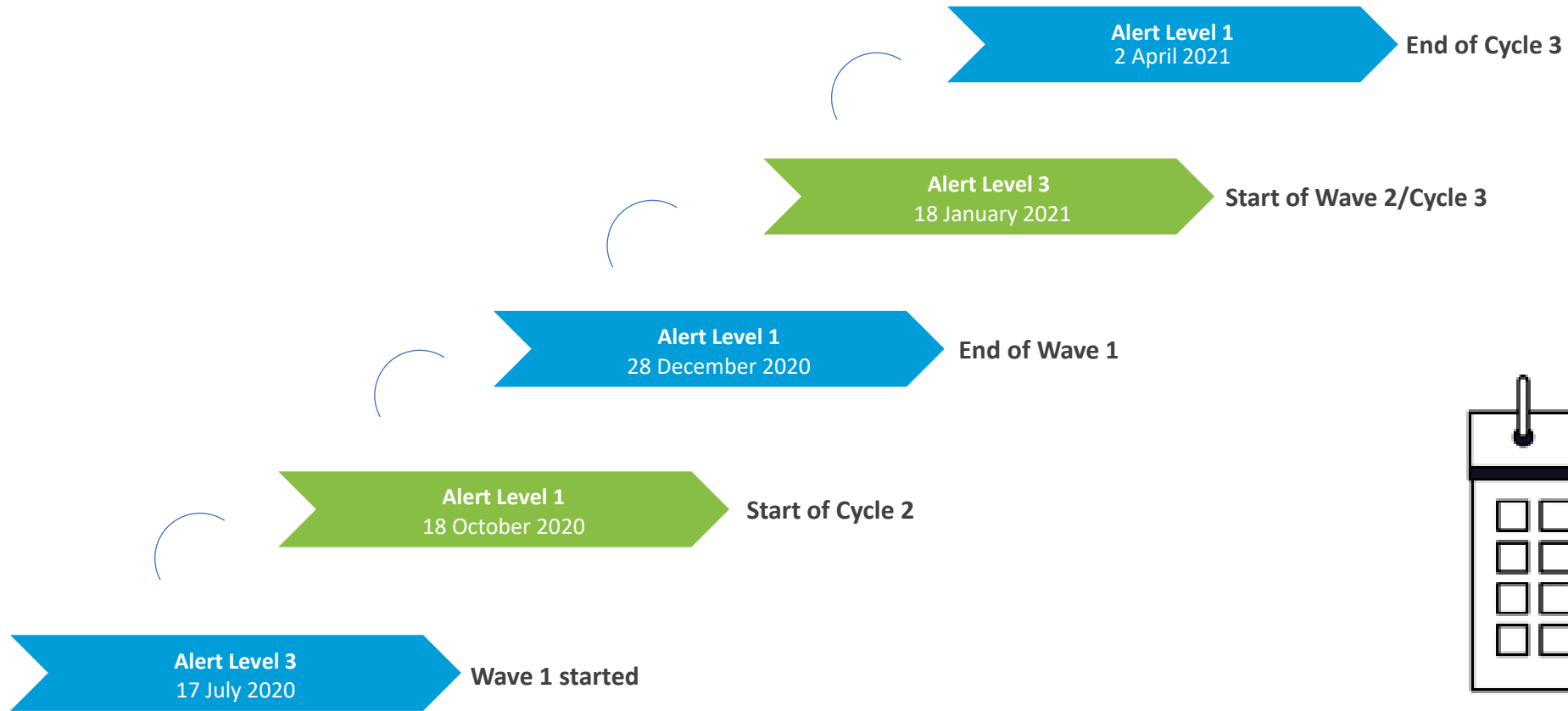


Retail Purchases

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



Fieldwork Timeline



Research Universe & Methodology

Universe:

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

Target: 15 000 face-to-face interviews & 7 500 diaries

Achieved sample: 15 040 face-to-face interviews & 7 792 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.





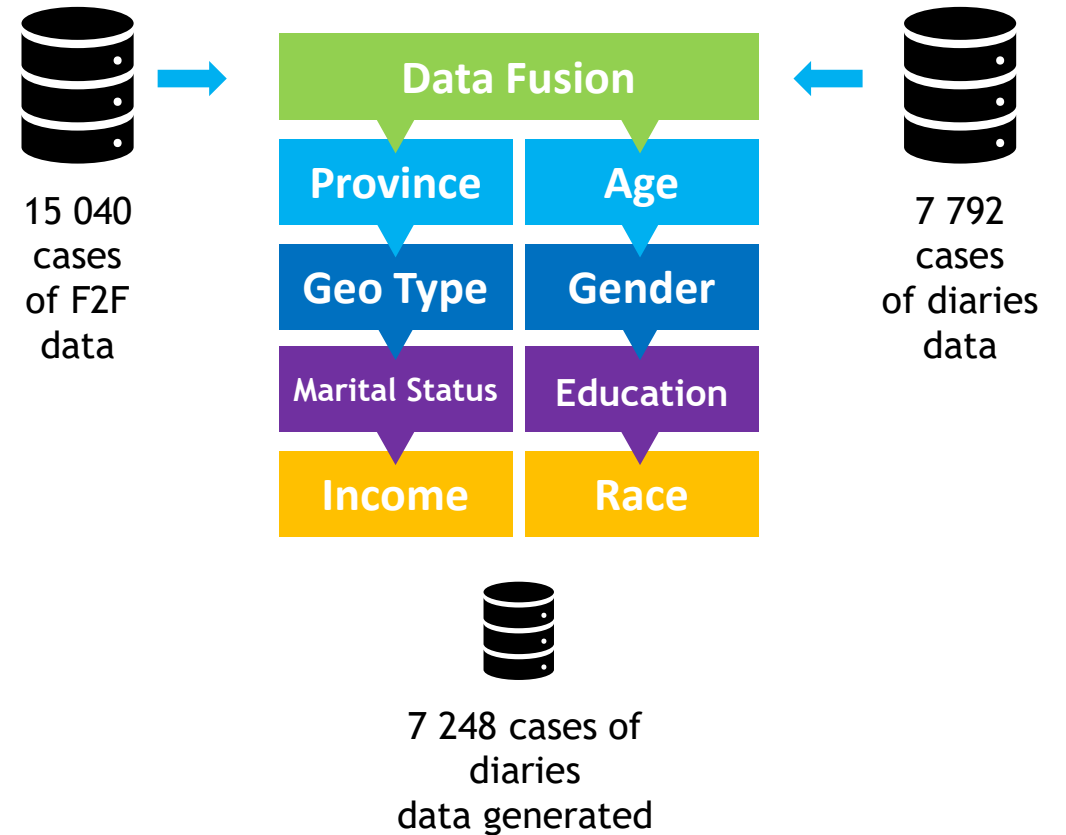
Sampling Design

In each monthly 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 15 040 interviews and 7 792 diaries.

Data Fusion

- 15 040 respondents completed a face-to-face questionnaire. Half were expected to complete the leave behind questionnaire.
- 7 792 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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Household Substitutions

Overall
Substitution
rate **14%**

Substitutions required due to:

- Refusals
- House inaccessible
- Nobody home after 2 call-backs
- EA inaccessible
- No residents in EA

Backchecks

26%
MAPS

15%
Industry

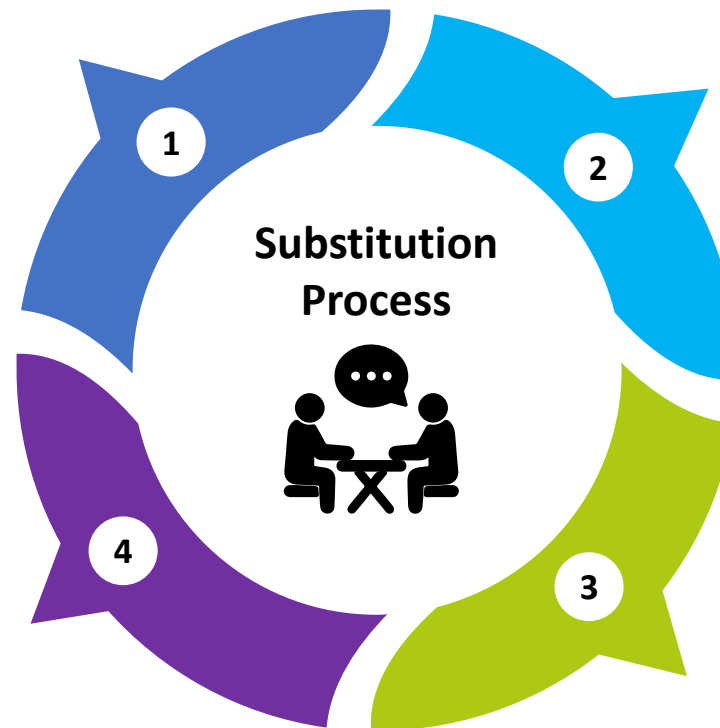


Identification of replacement points

- In 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 point 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



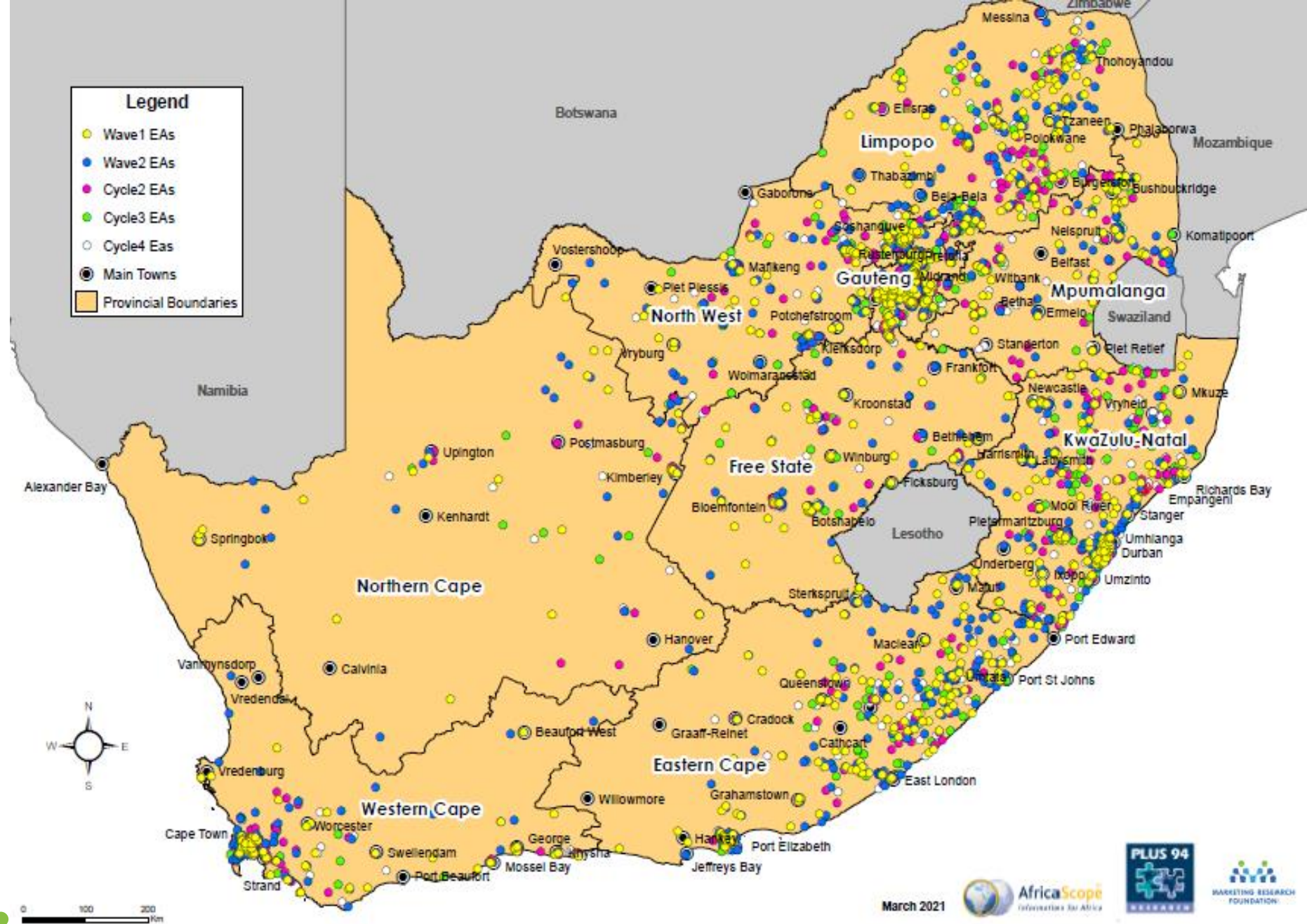
Need for substitution

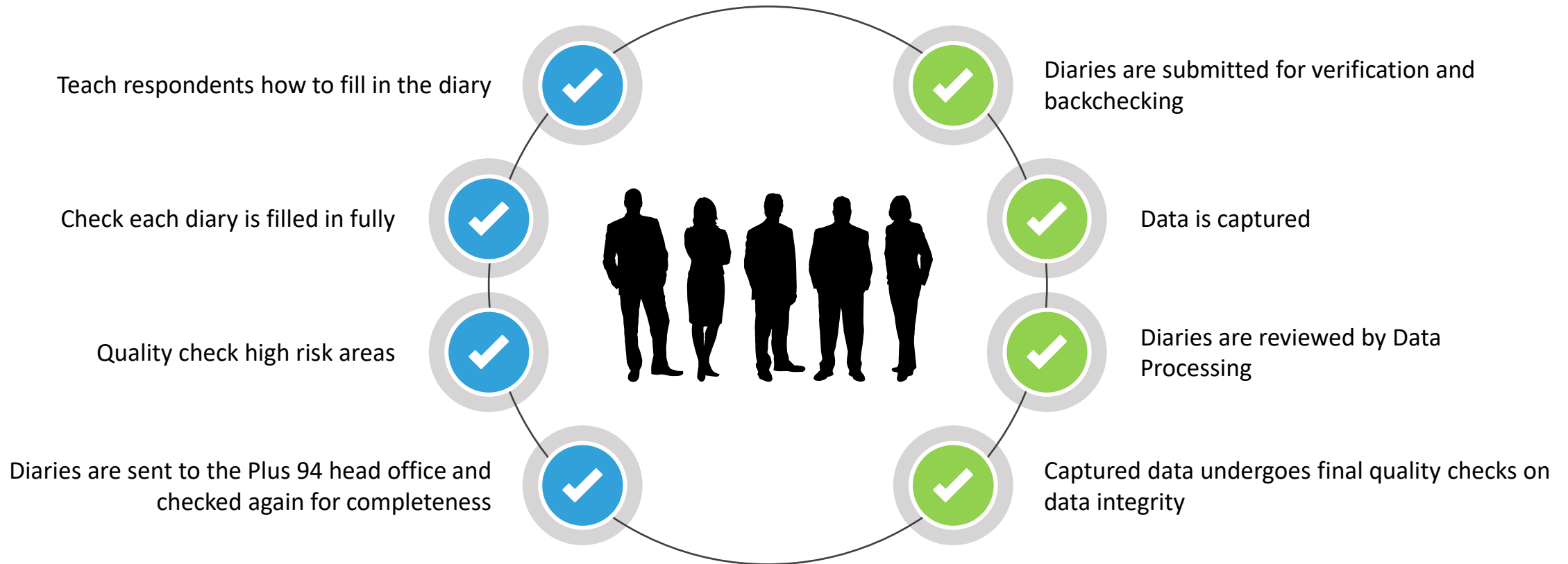
- Refusal to participate
- House inaccessible
- Nobody at the dwelling
- Denied access to gated residences

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



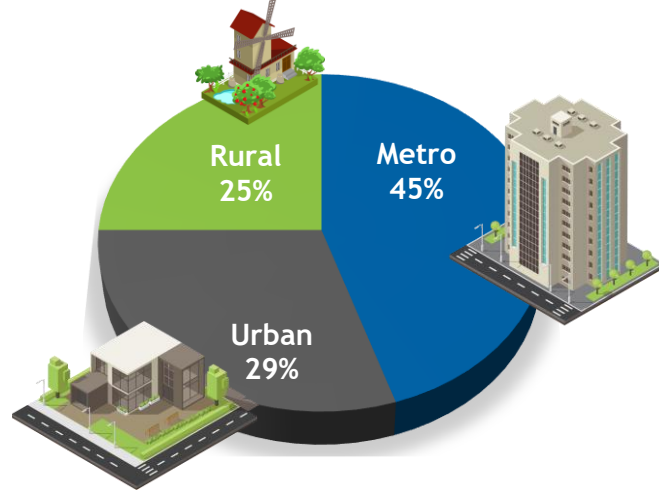




DEMOGRAPHICS

Demographic Profile

Area Distribution



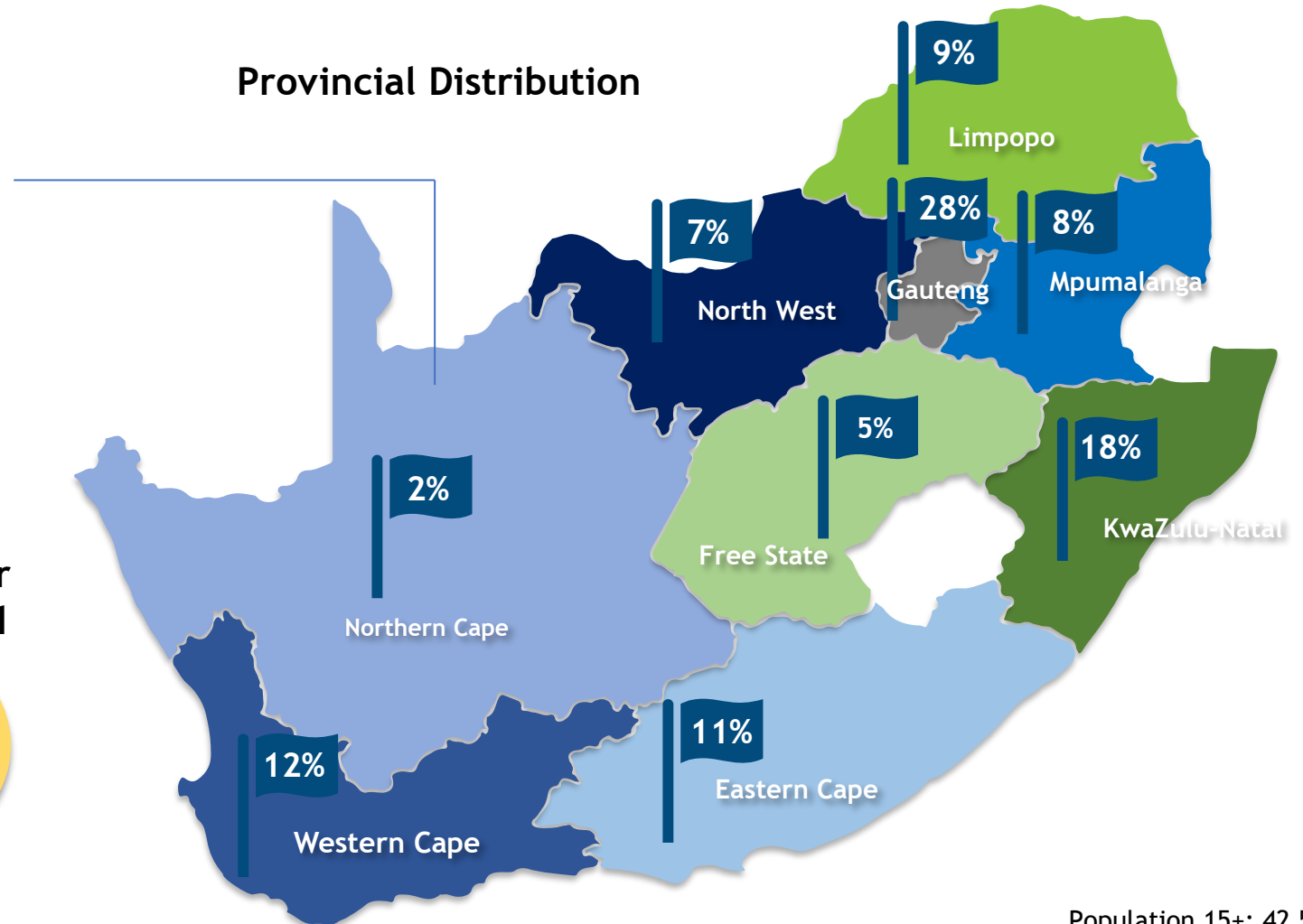
Households



People per household

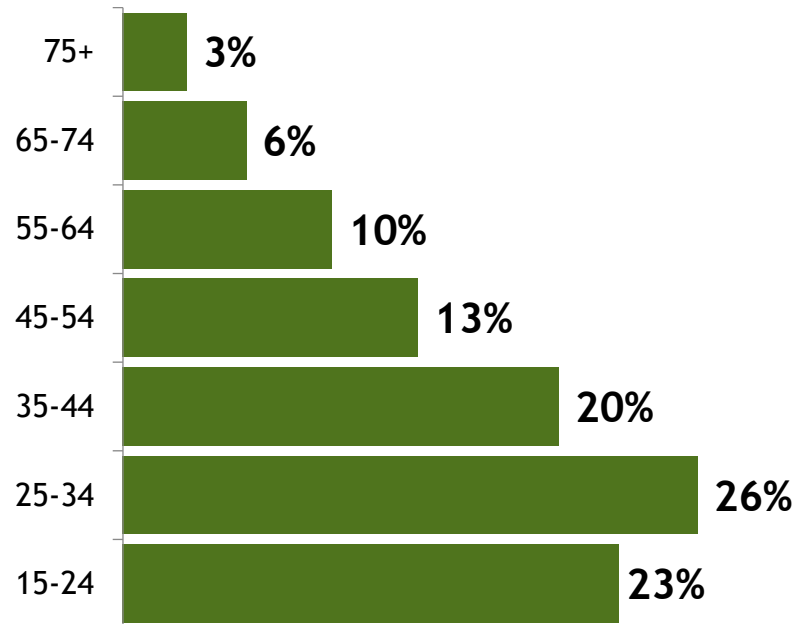


Provincial Distribution

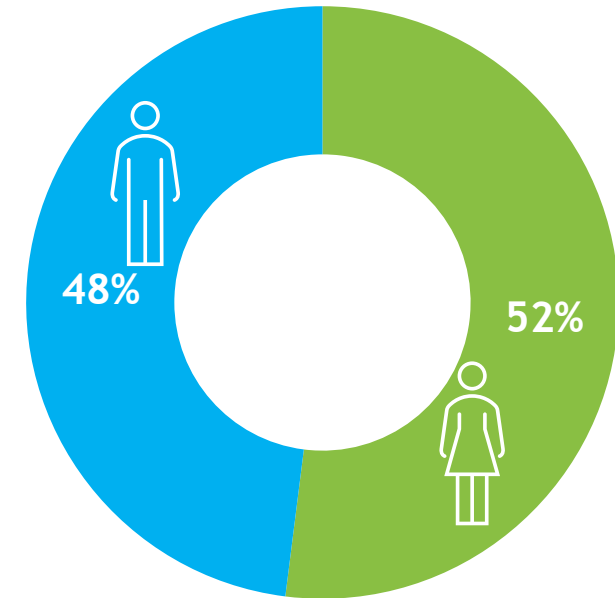


Demographic Profile

Age



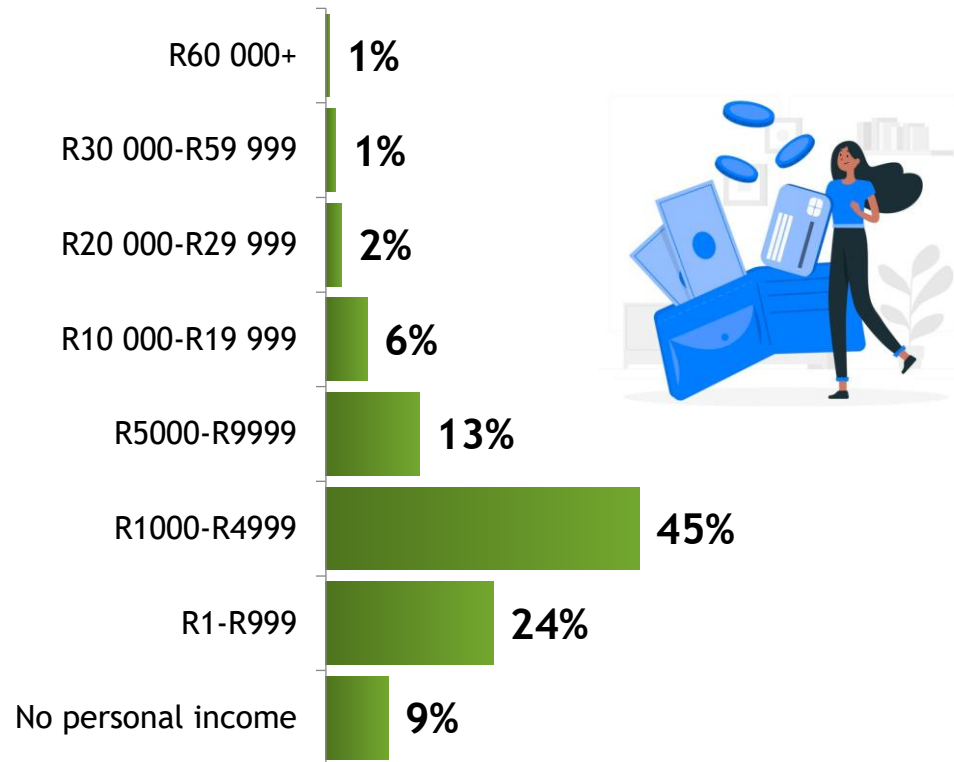
Gender



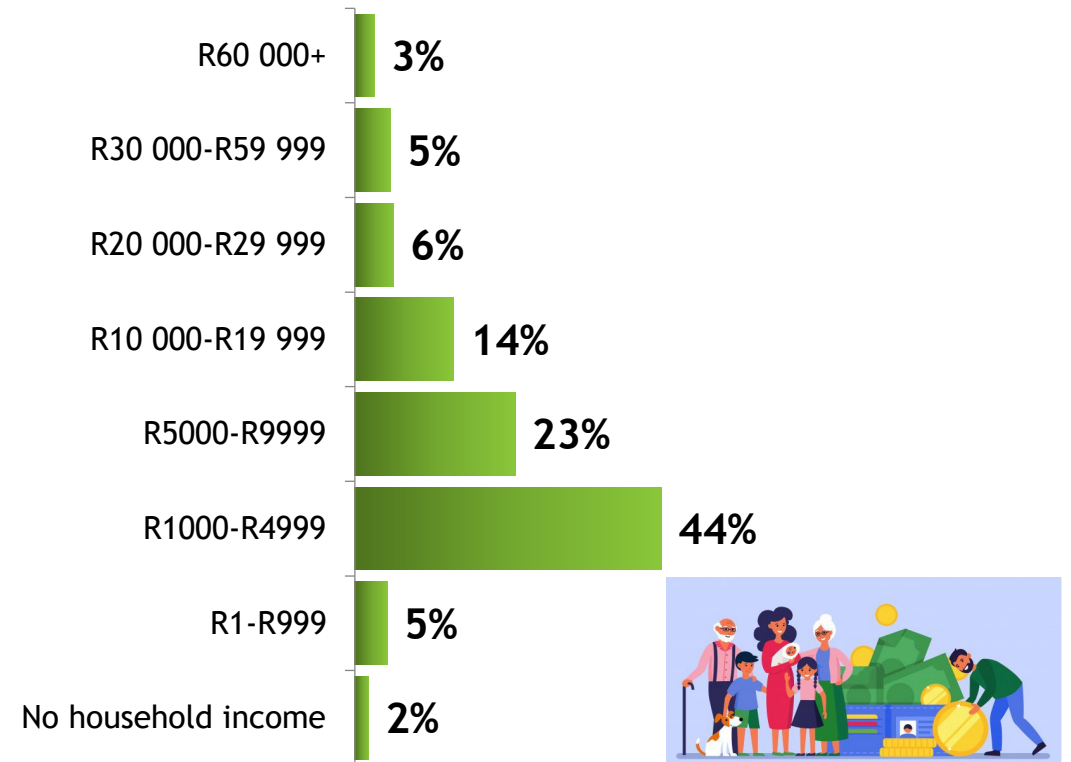
Average age of respondents is 38 years

Demographic Profile

Personal Income

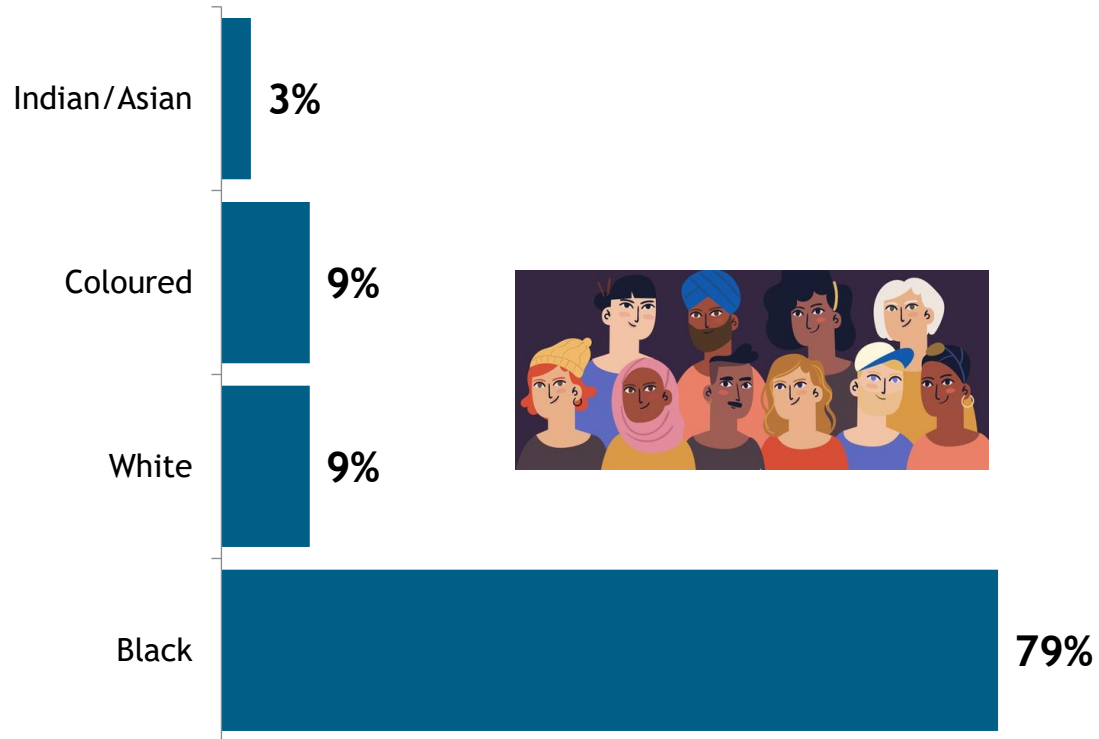


Household Income

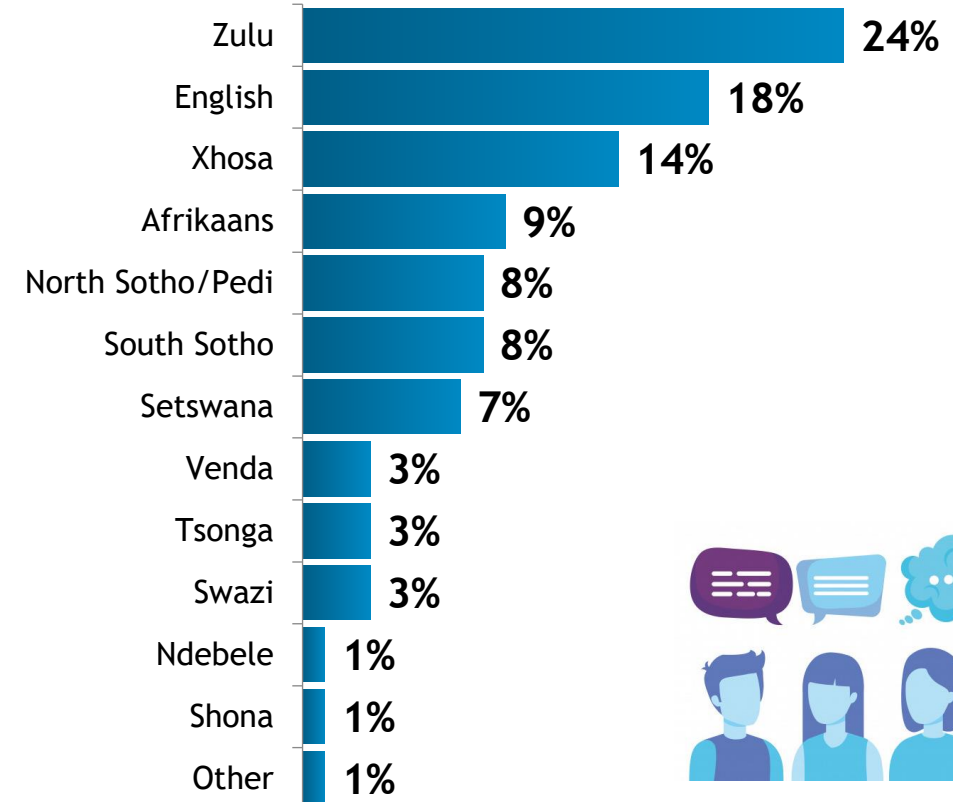


Demographic Profile

Race

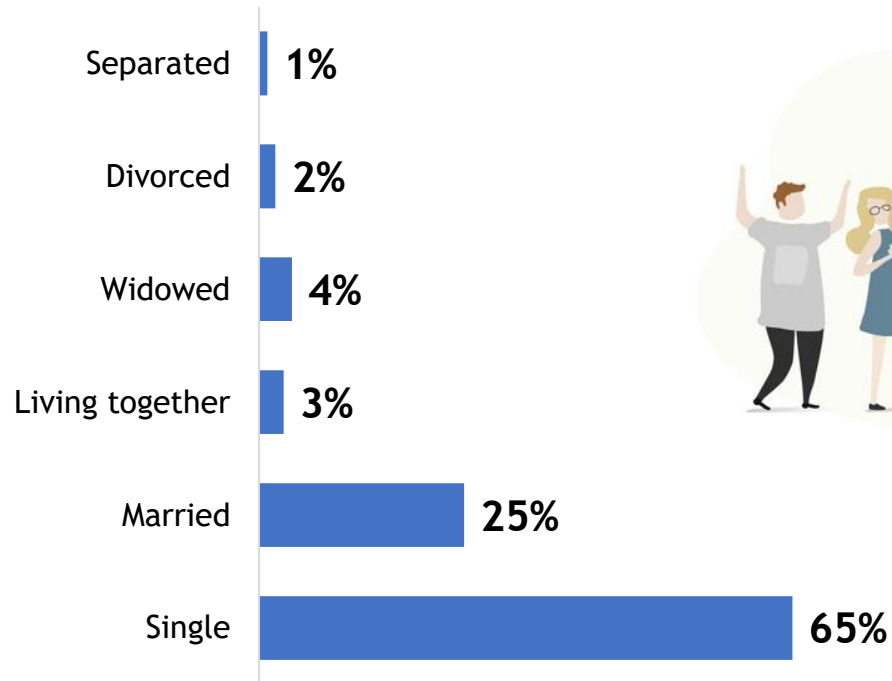


Most Spoken Language

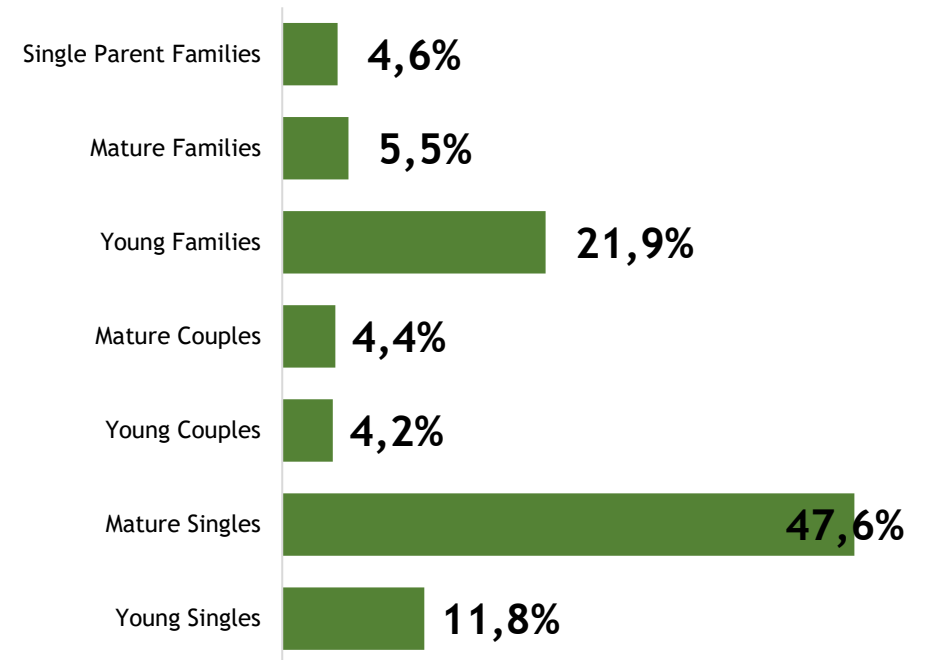


Demographic Profile

Marital Status



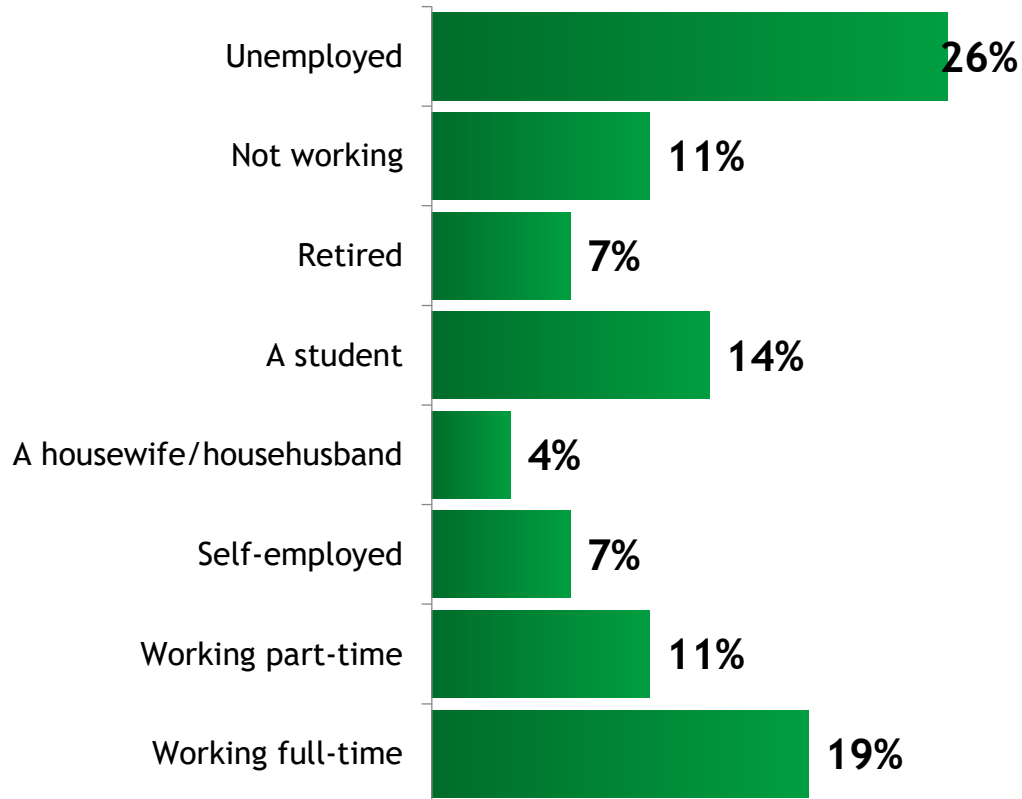
Life Stages



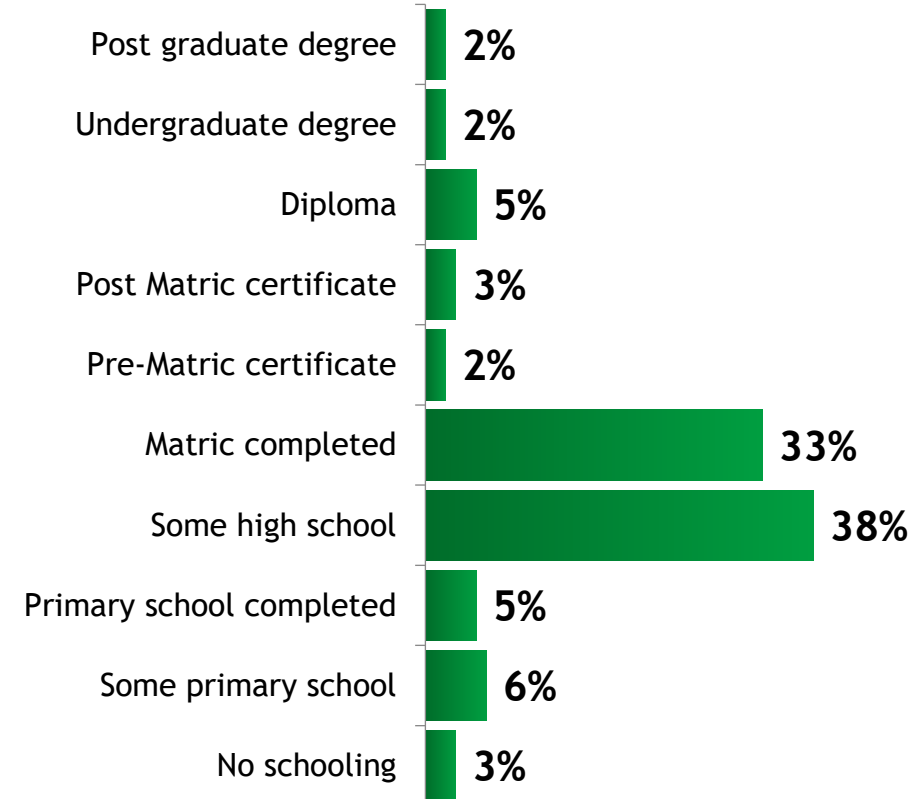
Demographic Profile



Employment Status

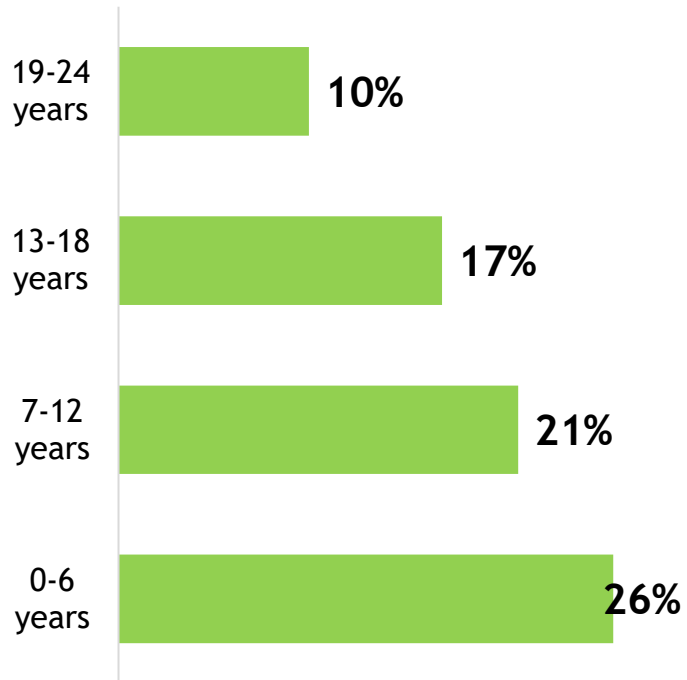


Highest Level of Education Achieved



Demographic Profile

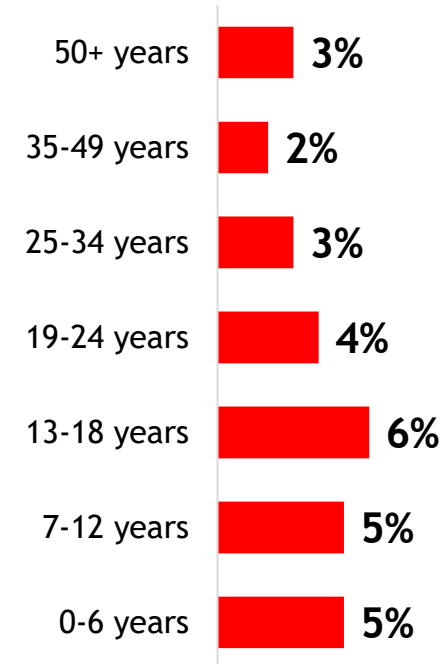
Dependents (own children)



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.

In total, about **55%** of all respondents have dependents.

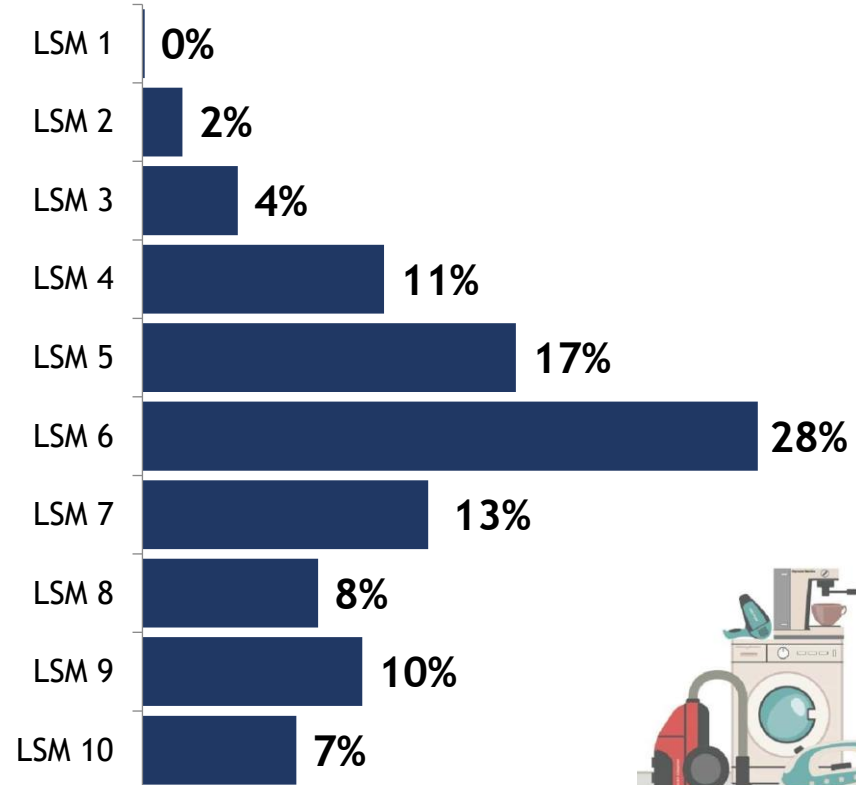




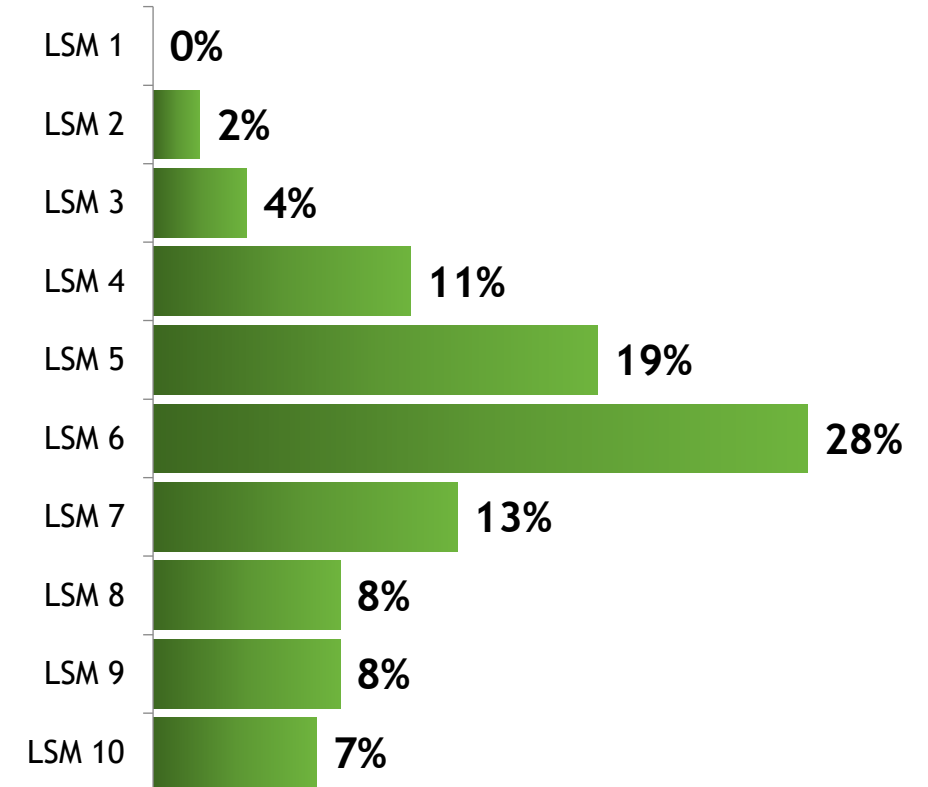
SEGMENTATION

LSM Segmentation

MAPS June 2021 LSM Segments

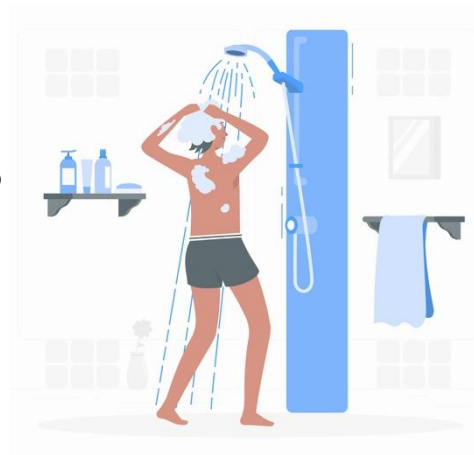
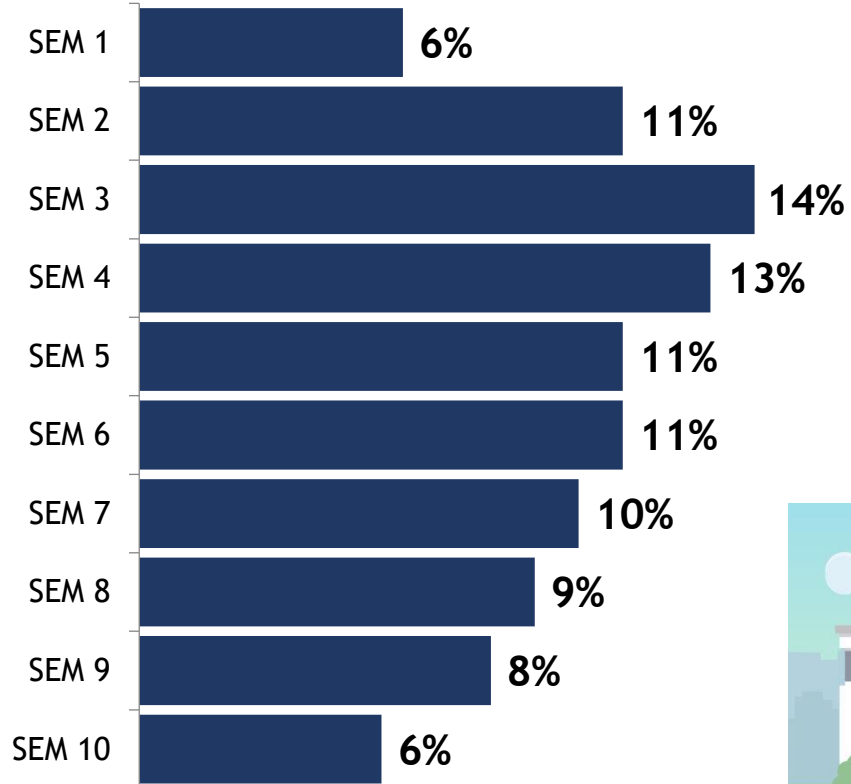


PAMS 2019 LSM Segments

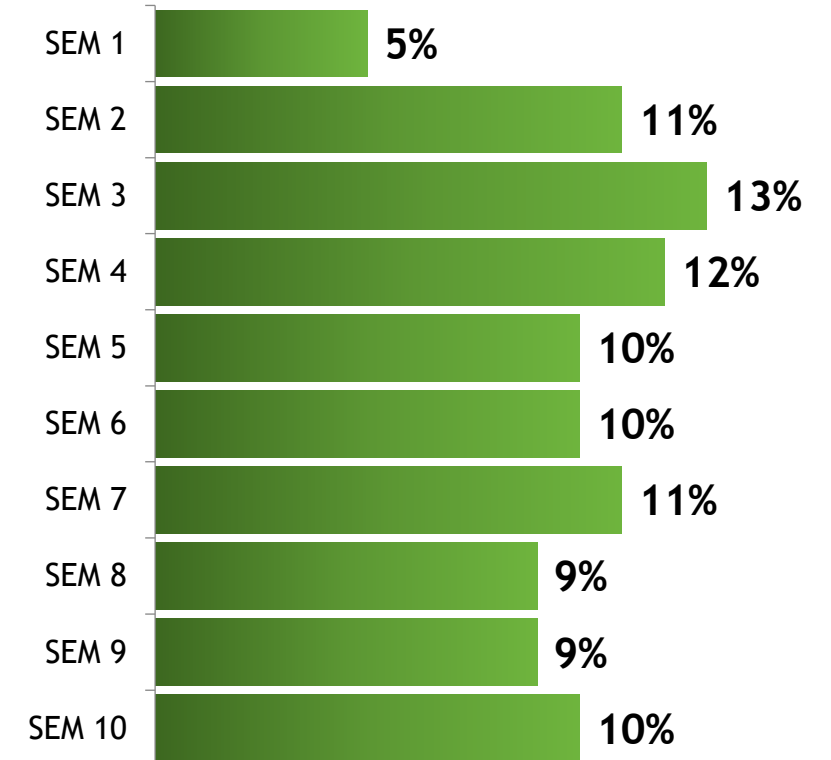


SEM Segmentation

MAPS June 2021 SEM Segments



PAMS 2019 SEM Segments





HOME ACCESS TO BASIC AMENITIES

Electricity in the home

96%

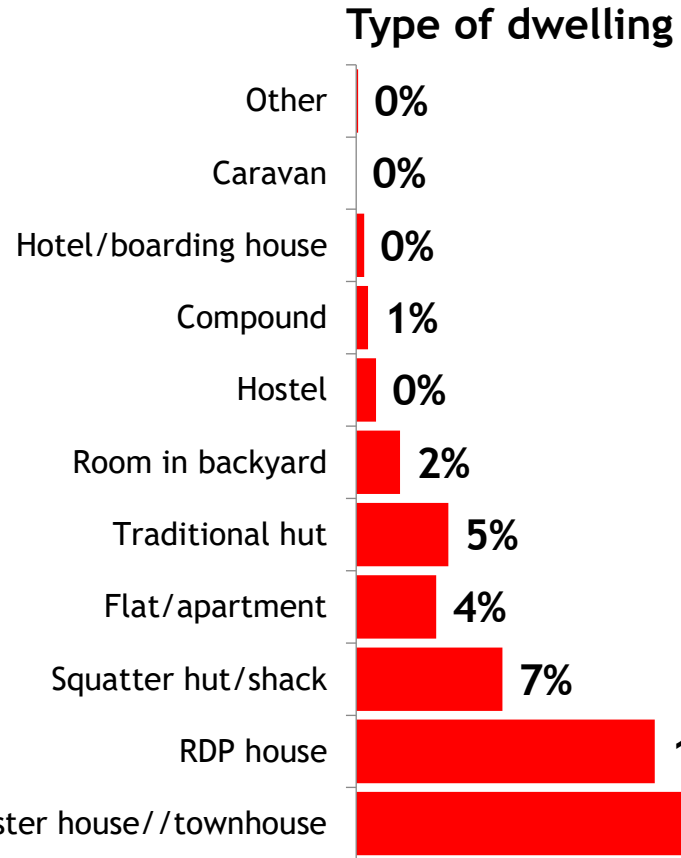


Water in the home

65%



7%
No water



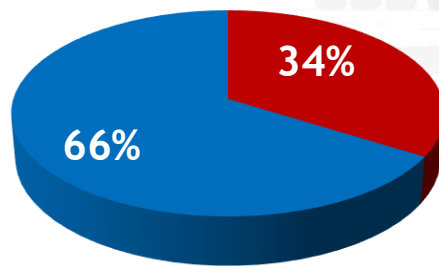
45% Metro, 30% Urban, 24% Rural

65%

Access to basic amenities



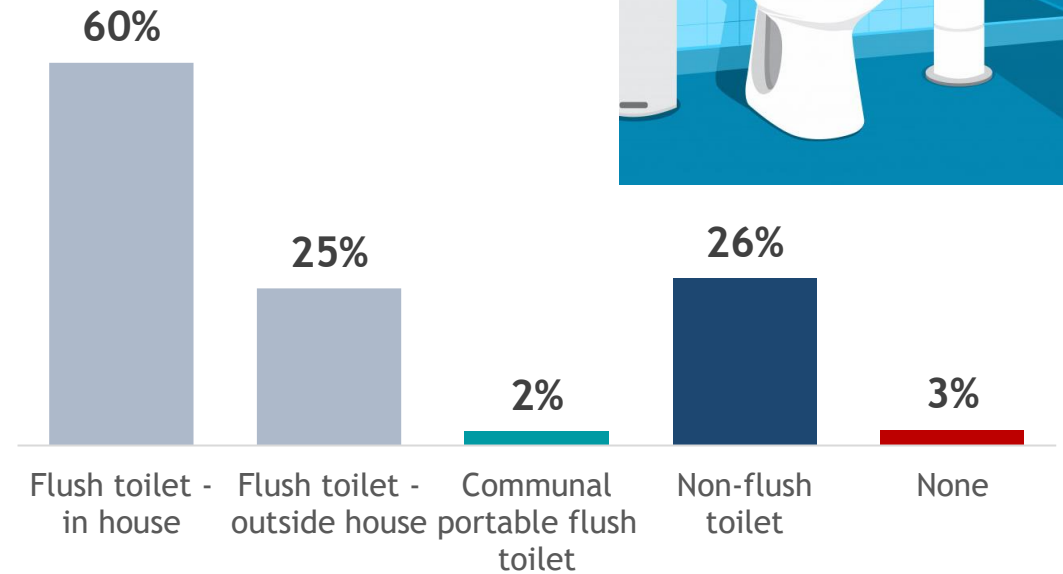
Hot running water from a geyser



■ 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



Newspapers
Past 3 months **46%**



Magazines
Past 3 months **21%**



Store Magazines
Past 3 months **24%**



Television
Past 4 weeks **75%**



Cinema
Past 6 months **3%**



Radio
Past 4 weeks **74%**



Outdoor Advertising
Past 4 weeks **60%**



***Social Media**
Past 4 weeks **51%**

Various timelines available

- 3 months
- 4 weeks
- 7 days
- Yesterday

***43% excluding WhatsApp**

51% Including WhatsApp

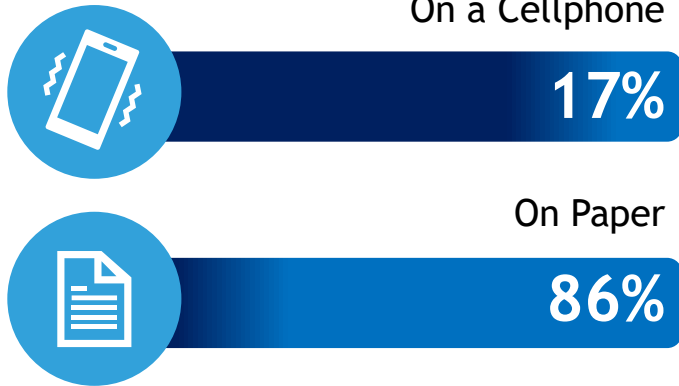
Source: MAPS Wave 2020/2021 (Jul '20 - Mar '21)

Top Print Publications Read - AIR

Newspapers

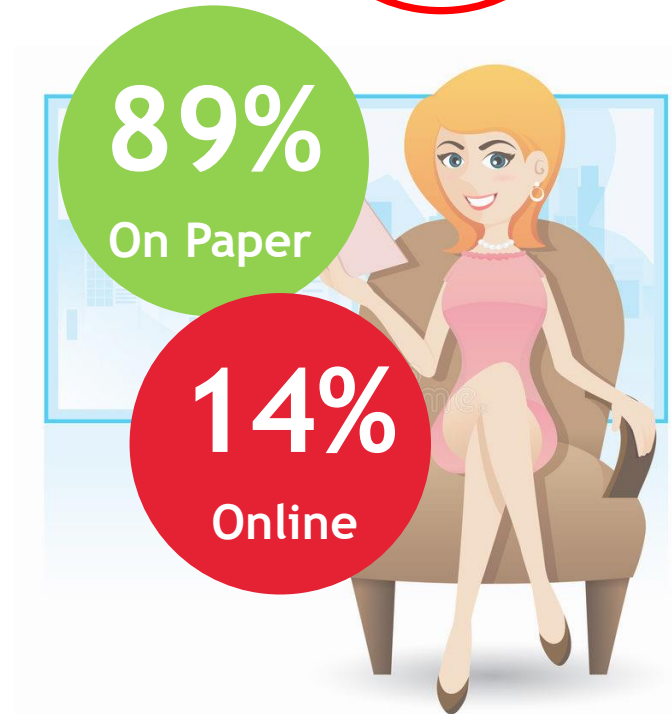


Platforms used to read newspapers



Newspaper Readers Base: 19 412 824

Magazines



Population 15+: 42 573 162

Magazine Readers Base: 9 039 349

Multiple Mentions Possible

Source: MAPS Wave 2020/2021 (Jul '20 - Mar '21)



Newspaper Inserts Read

Past 4 weeks

Did you read newspaper inserts?



Read Newspaper Inserts Base: 10 600 215



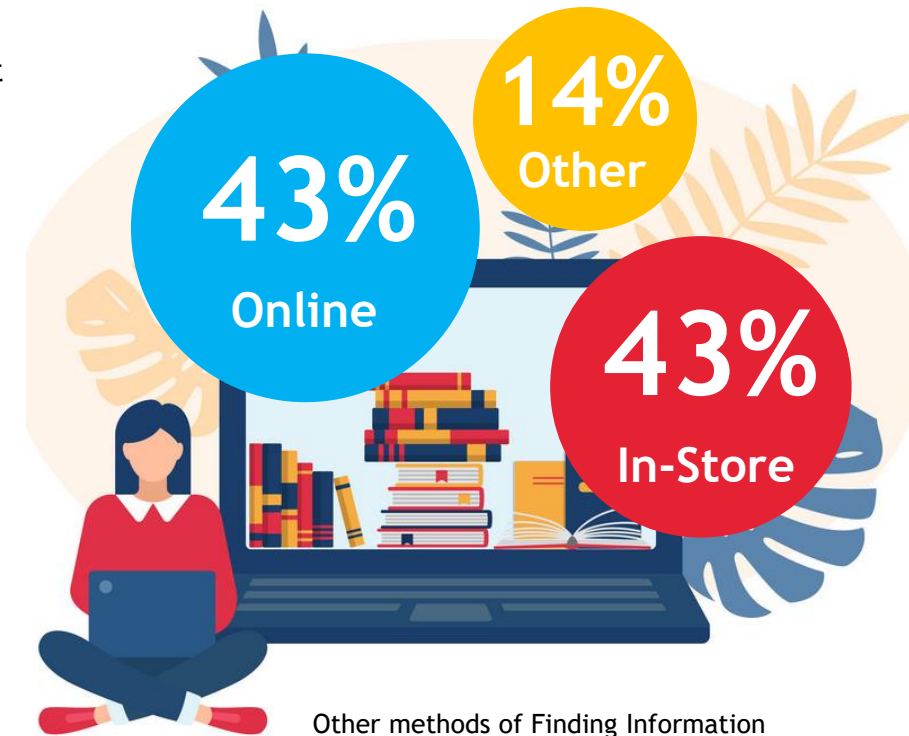
Importance of the information in inserts
in defining your shopping list?



Importance of Inserts Base: 8 107 578

Source: MAPS Wave 2020/2021 (Jul '20 - Mar '21)

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



Other methods of Finding Information
Base: 6 424 526

Household Satellite Service



Households with DStv
PVR decoder:

9%



Households with an
OpenView memory
stick:

1%

Households: 17 163 000

86.1%
DStv

1.7%
FREEVISION

1.4%
StarSat

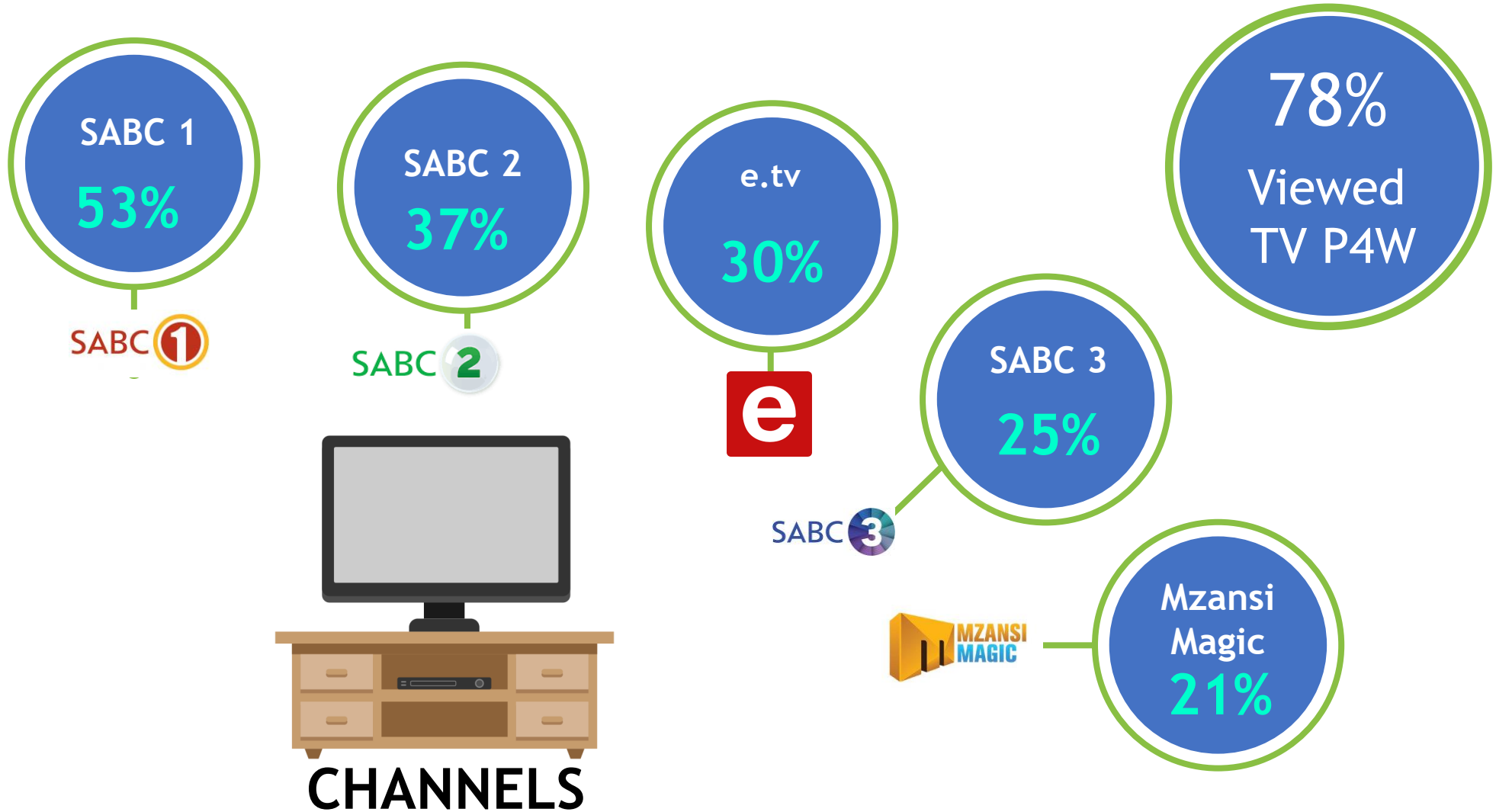
Satellite Households

Base: 9 175 000

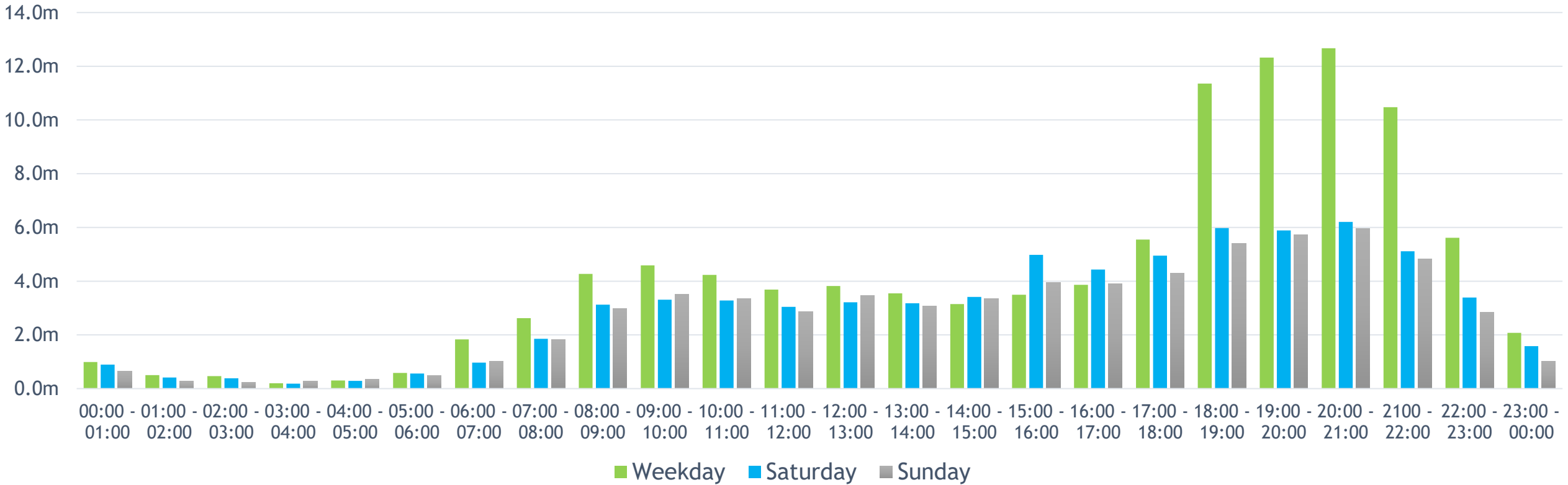
12%
OVHD
OPENVIEW HD

Top TV Channels Viewed

Past 4 weeks



TV Viewing Times



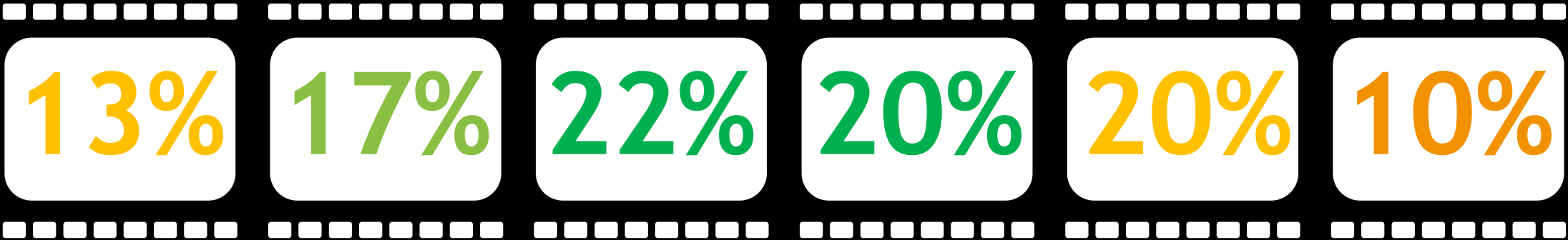
Cinema Visits



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

3

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



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

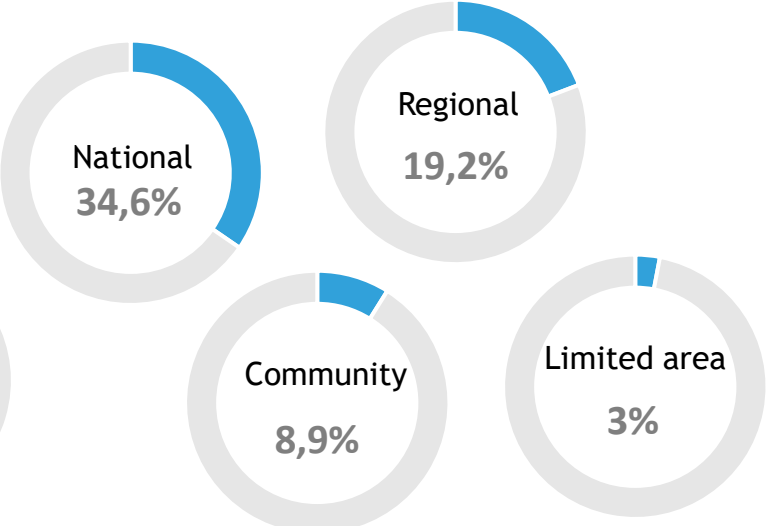
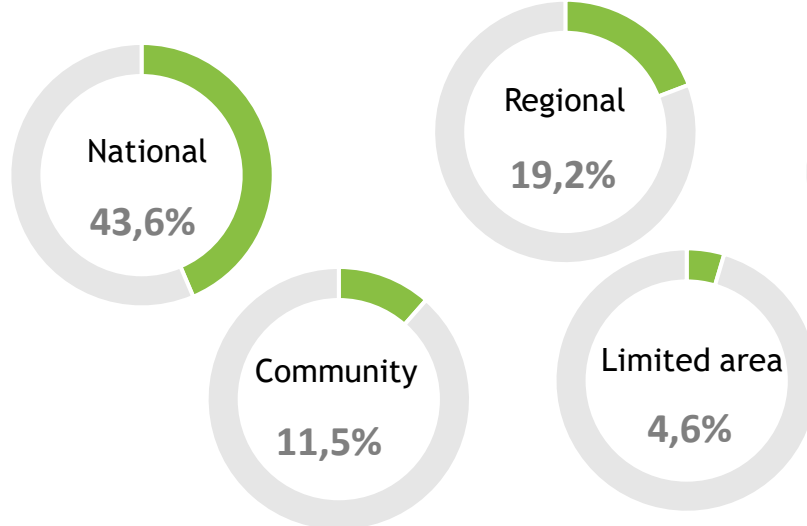
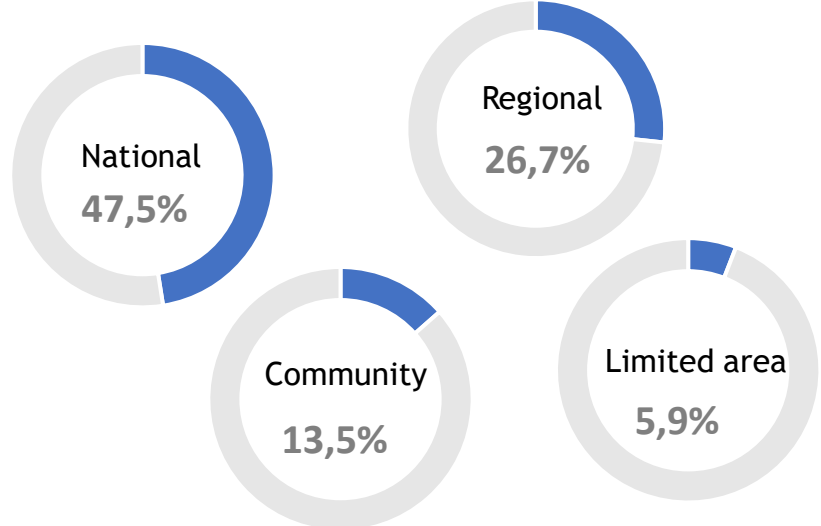
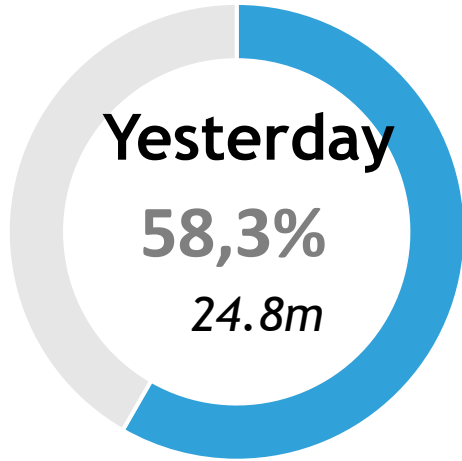
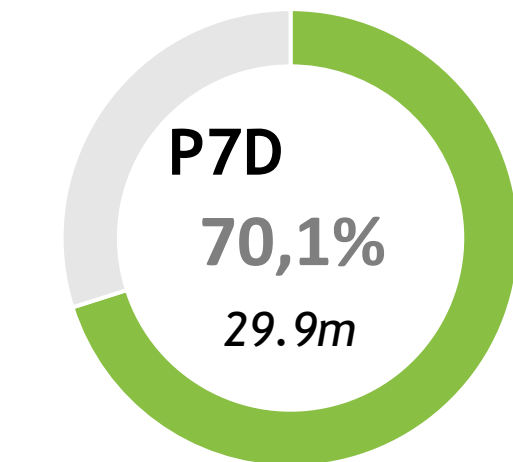
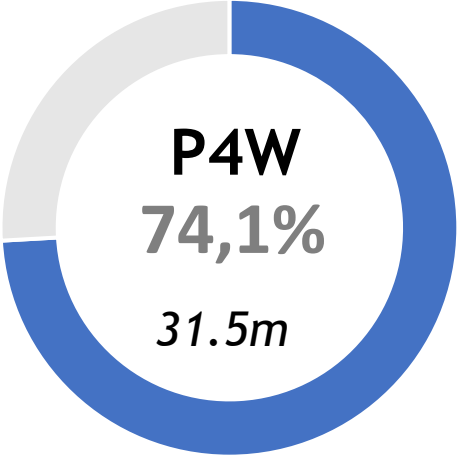


Average cinema outing cost:

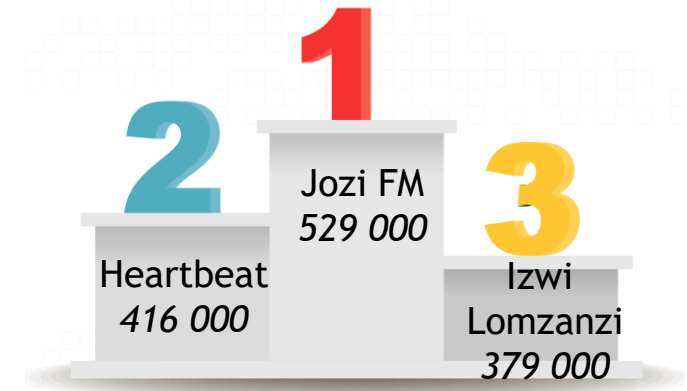
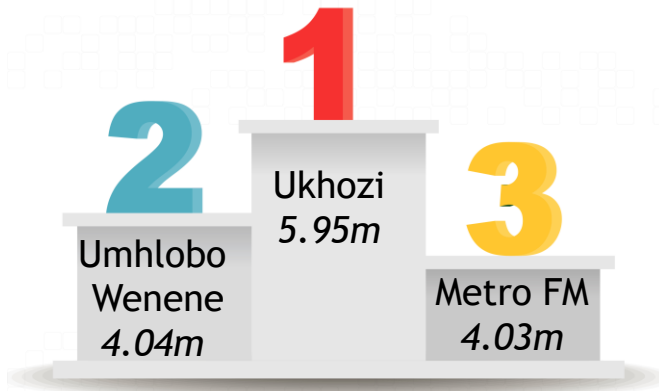
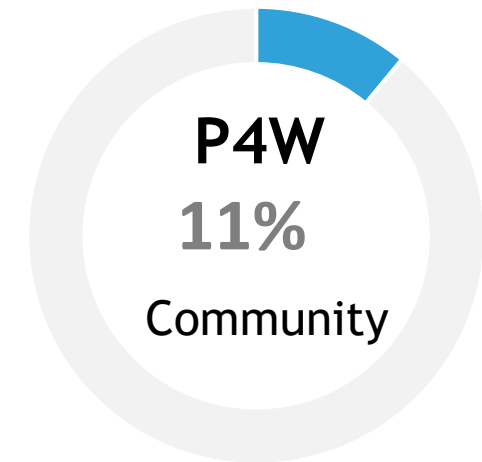
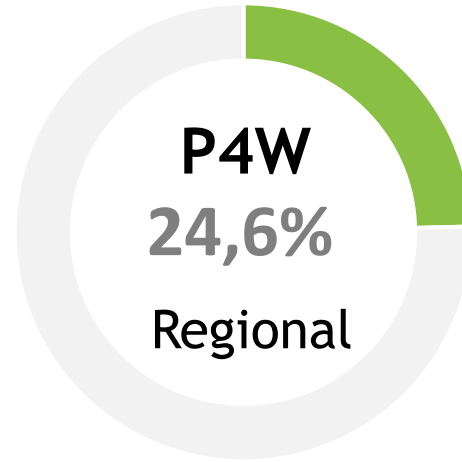
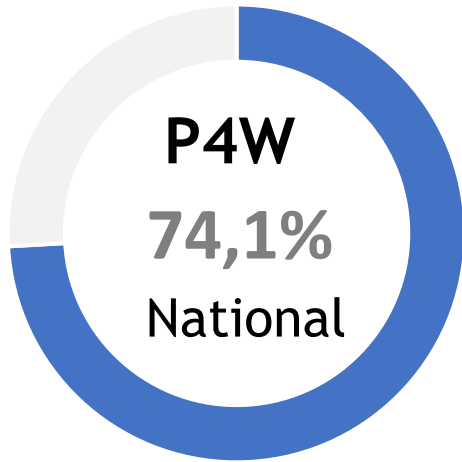
R335 for **3** people



Radio Reach - All Radio Stations



Top Radio Stations - Listeners P4W



Billboards Viewed on side of the Road

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

52%



Walking

69%



Minibus taxi

71%

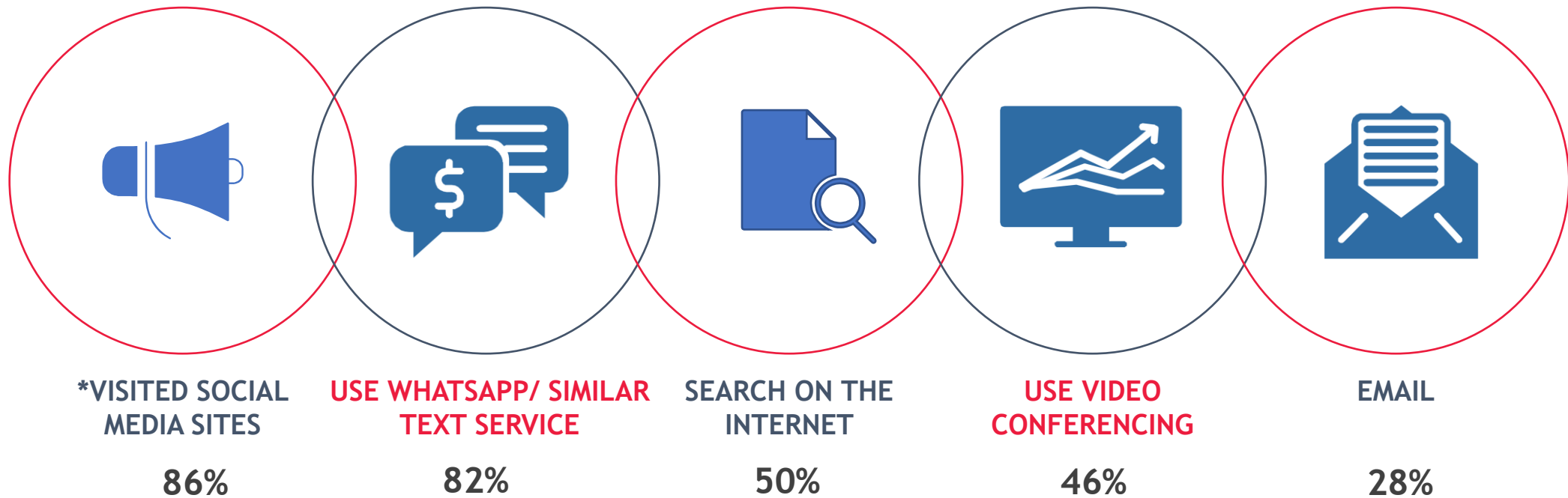


Car/E-hailing/Metered taxi/Motorcycle

Top 5 Internet Activities

54% respondents have internet access

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



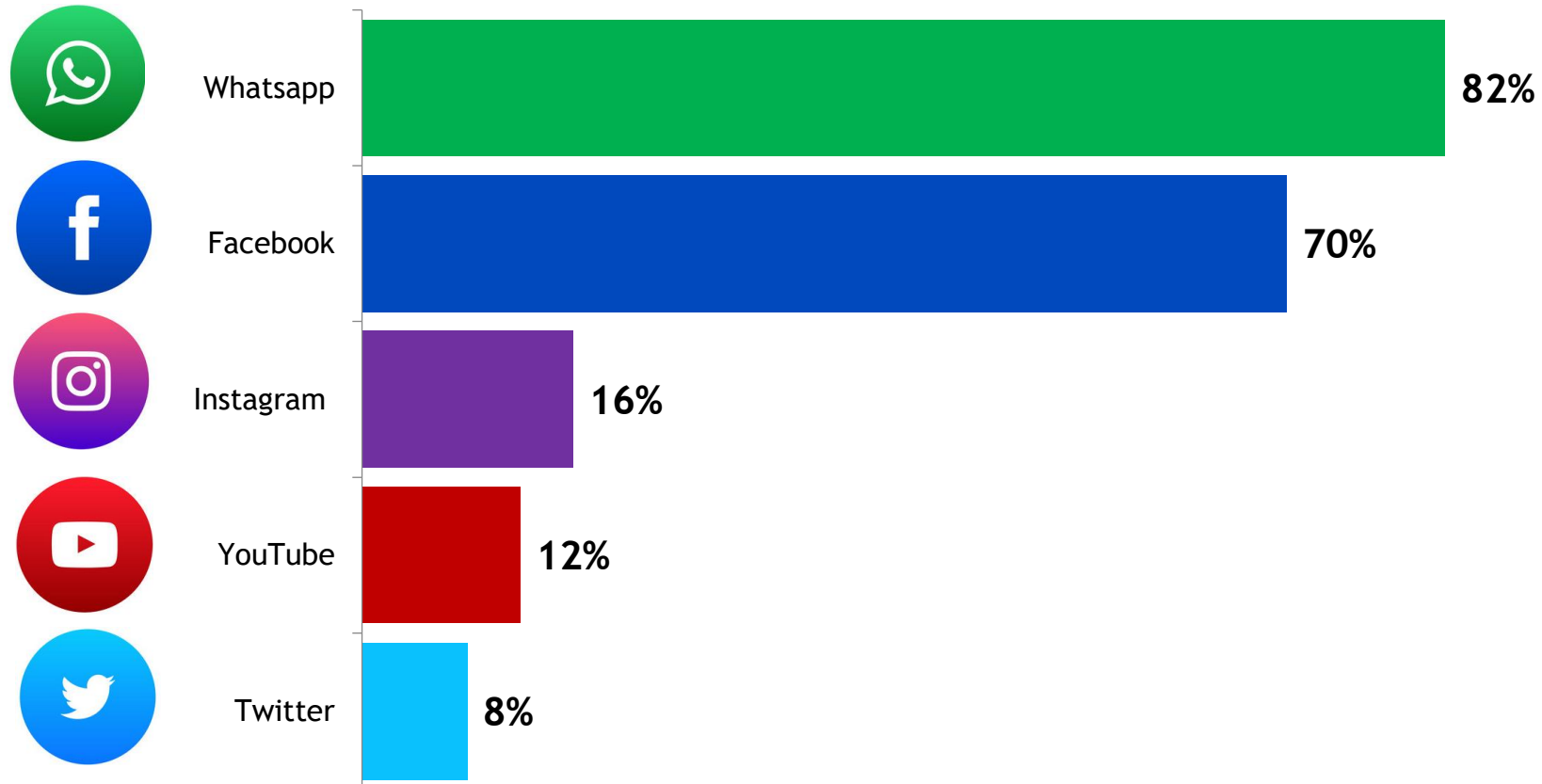
*85% Excl WhatsApp

Top 5 Social Media Sites Visited

Yesterday

47% respondents visited a social media site yesterday

Social Media Sites Visited



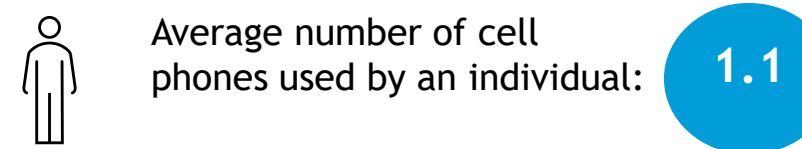
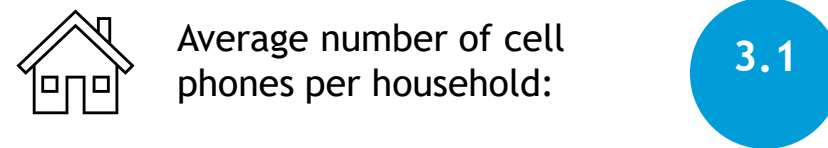
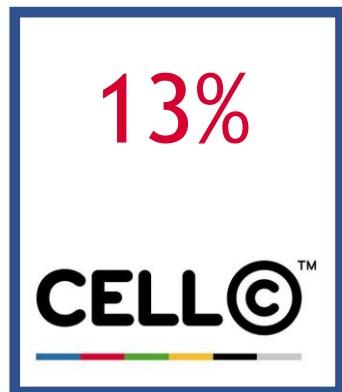
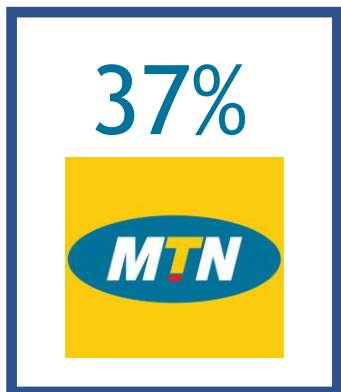
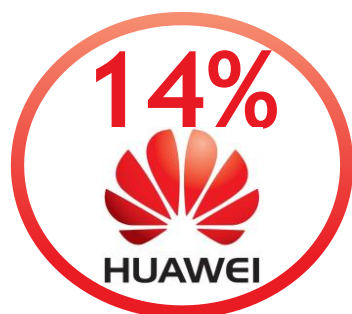
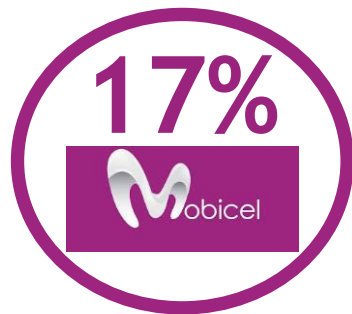


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CELLPHONES & HOUSEHOLD ENTERTAINMENT

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Top Cellphone Brands and Networks Used



FINANCIAL SERVICES

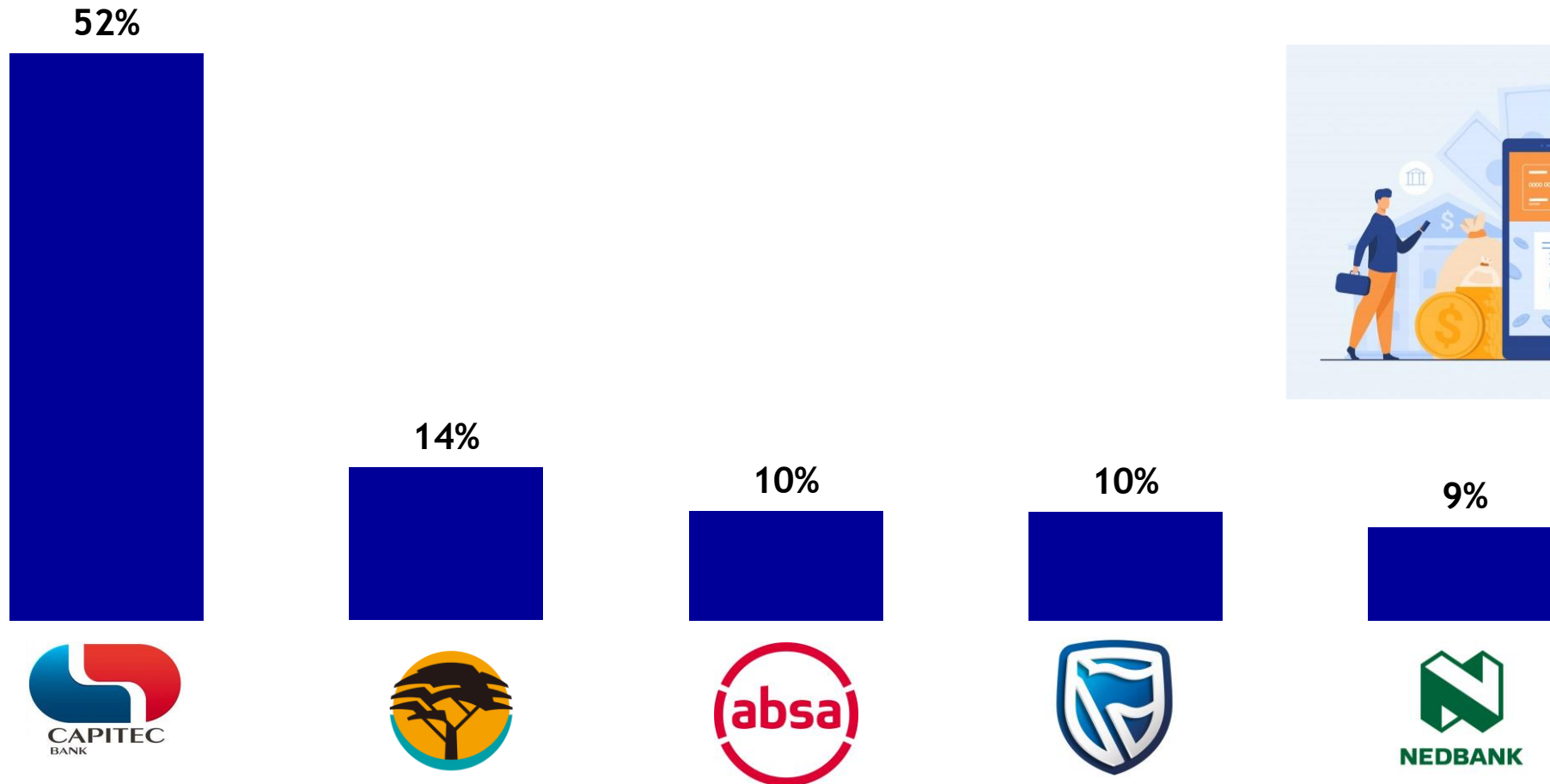
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Top 5 Primary Banks Used

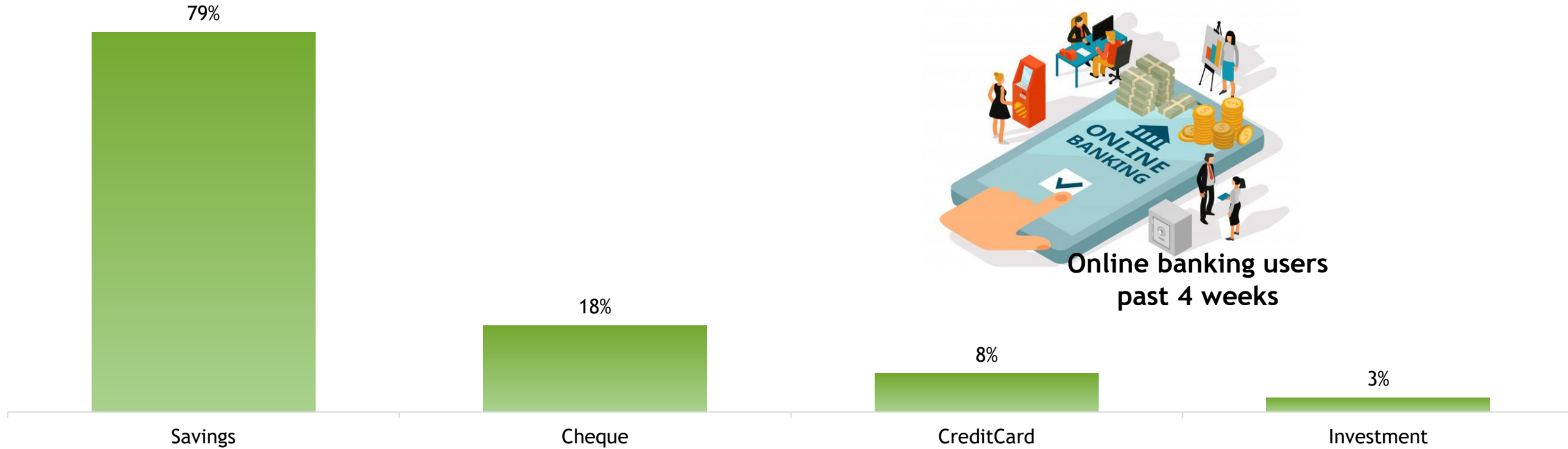
49% of the population are banked

What bank account is your salary paid into?



Top Financial Services Used

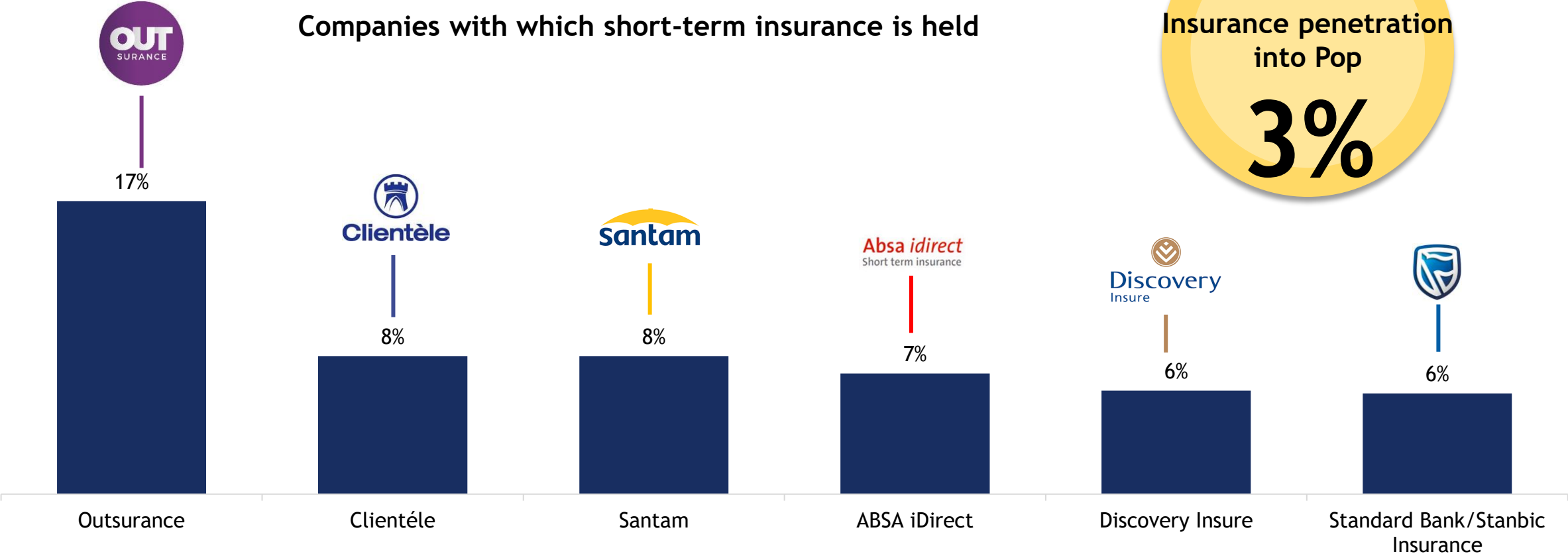
34%



Short-Term Insurance Usage: Top 10 Providers

Companies with which short-term insurance is held

Short Term Insurance penetration into Pop
3%



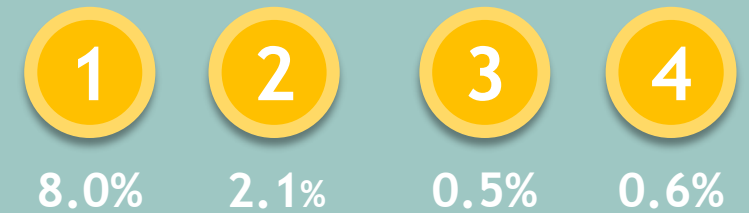
*Includes respondents that claimed Mutual & Federal



Do you belong
to a Stokvel?



How many stokvels do
you belong to?



AUTOMOTIVE

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Motor Vehicles

87% of vehicle owners personally
drive their cars

35% of households have motor vehicles

22%

TOYOTA

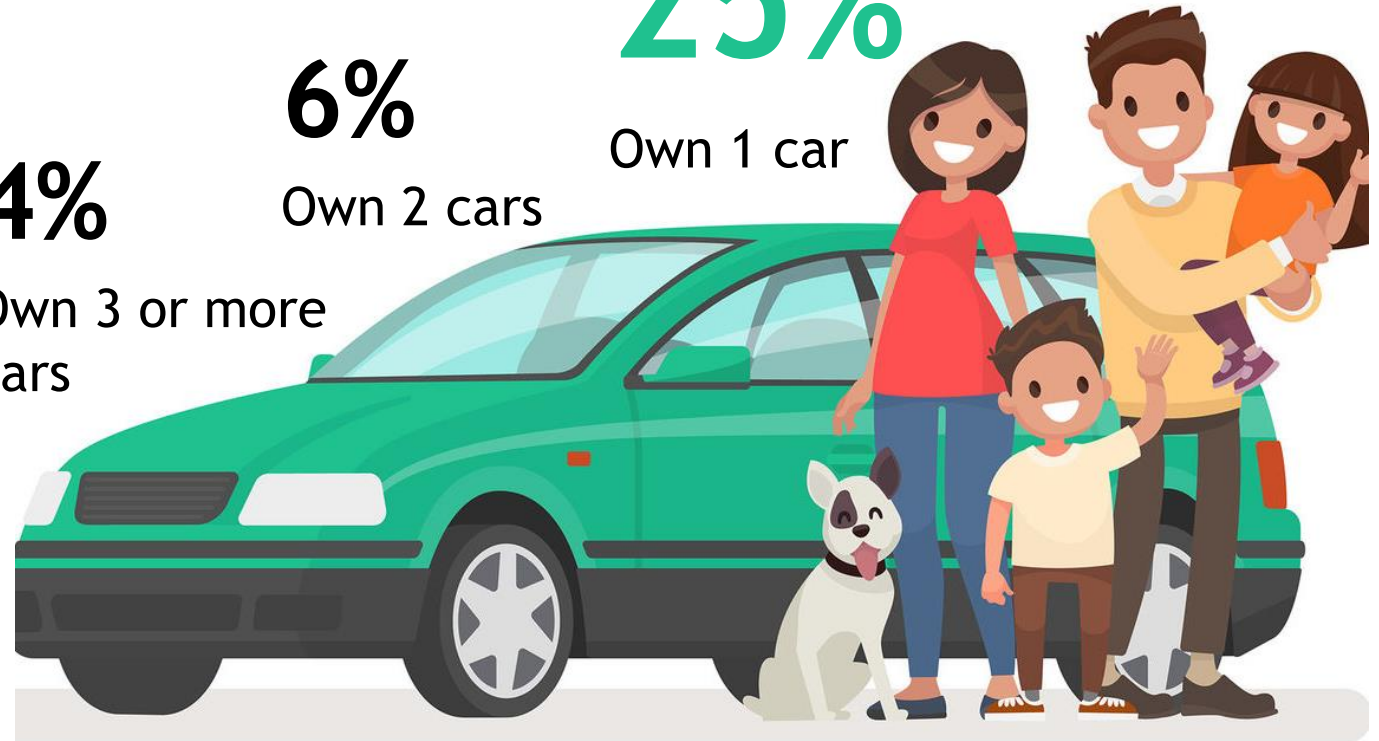
20%

Volkswagen

4%
Own 3 or more
cars

6%
Own 2 cars

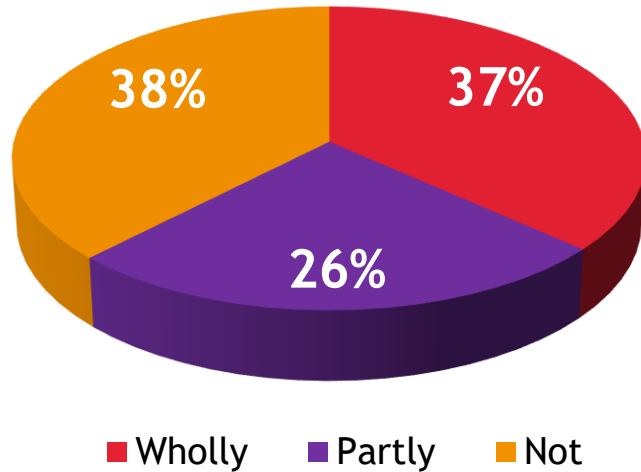
25%
Own 1 car



RETAIL

Household Purchase Behaviour

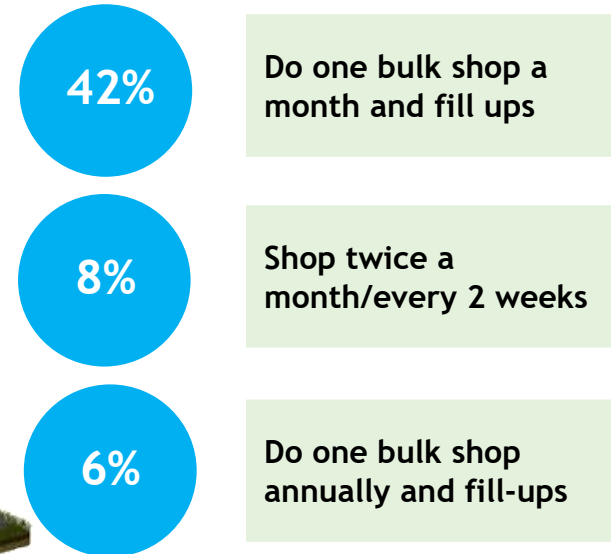
Purchase Responsibility



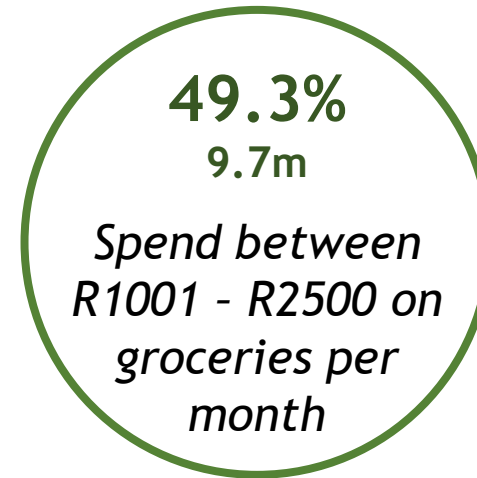
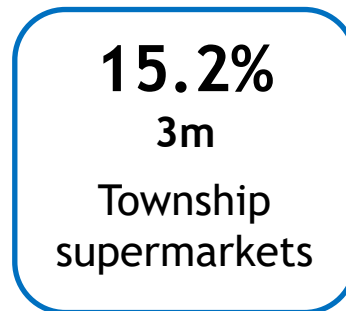
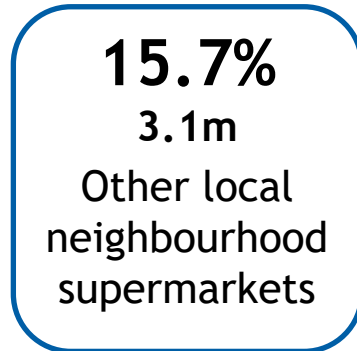
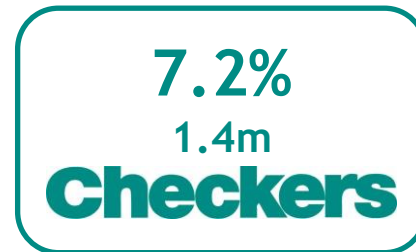
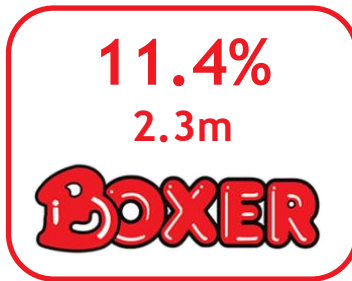
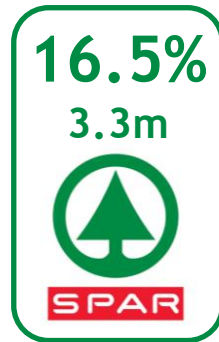
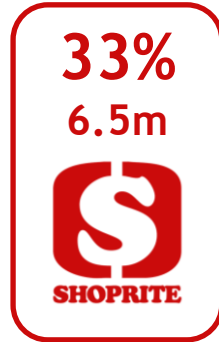
■ Wholly ■ Partly ■ Not



Frequency of Purchase



Day-to-Day Grocery Shopping

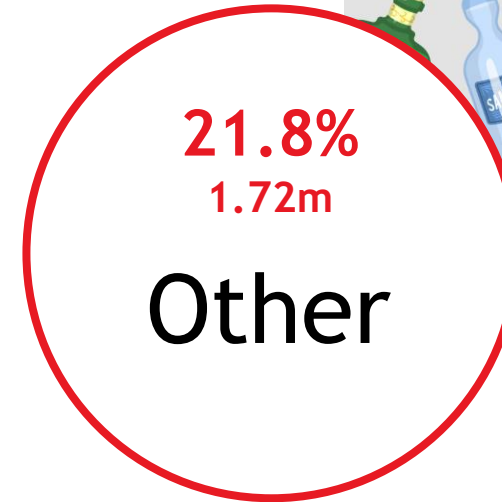
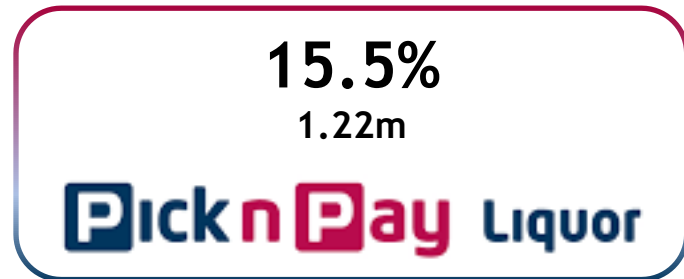
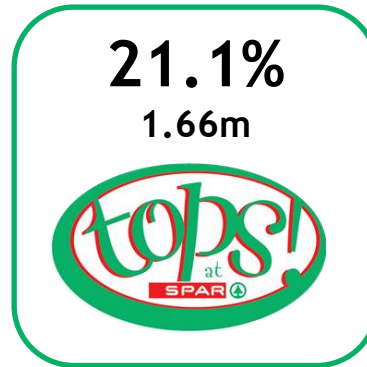


Base: Day-to-day Shopping
Outlets incl Spaza Shops -
25 377 000



Liquor Stores' Purchases

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

17%



Children's inner items

13%



Children's outer items

20%



Men's inner items

10%



Men's outer items

17%

None
51%



Clothing Purchases: Top Stores

Past 3 months



Where have you purchased clothing?

Women



n = 8 510 088

Men



n = 8 219 937

Children



n = 9 815 579



MALLS

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RESEARCH



Top Malls Visited Per Province

Past 4 Weeks



NEW!



Gauteng

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

KwaZulu-Natal

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

Western Cape

1. Liberty Promenade
2. Canal Walk
3. Cape Gate

Mpumalanga

1. Riverside Mall
2. Tonga Mall

Eastern Cape

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

Free State

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

Limpopo

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

North West

1. Mega City Centre

Northern Cape

1. Diamond Pavillion Shopping Centre



COSMETICS

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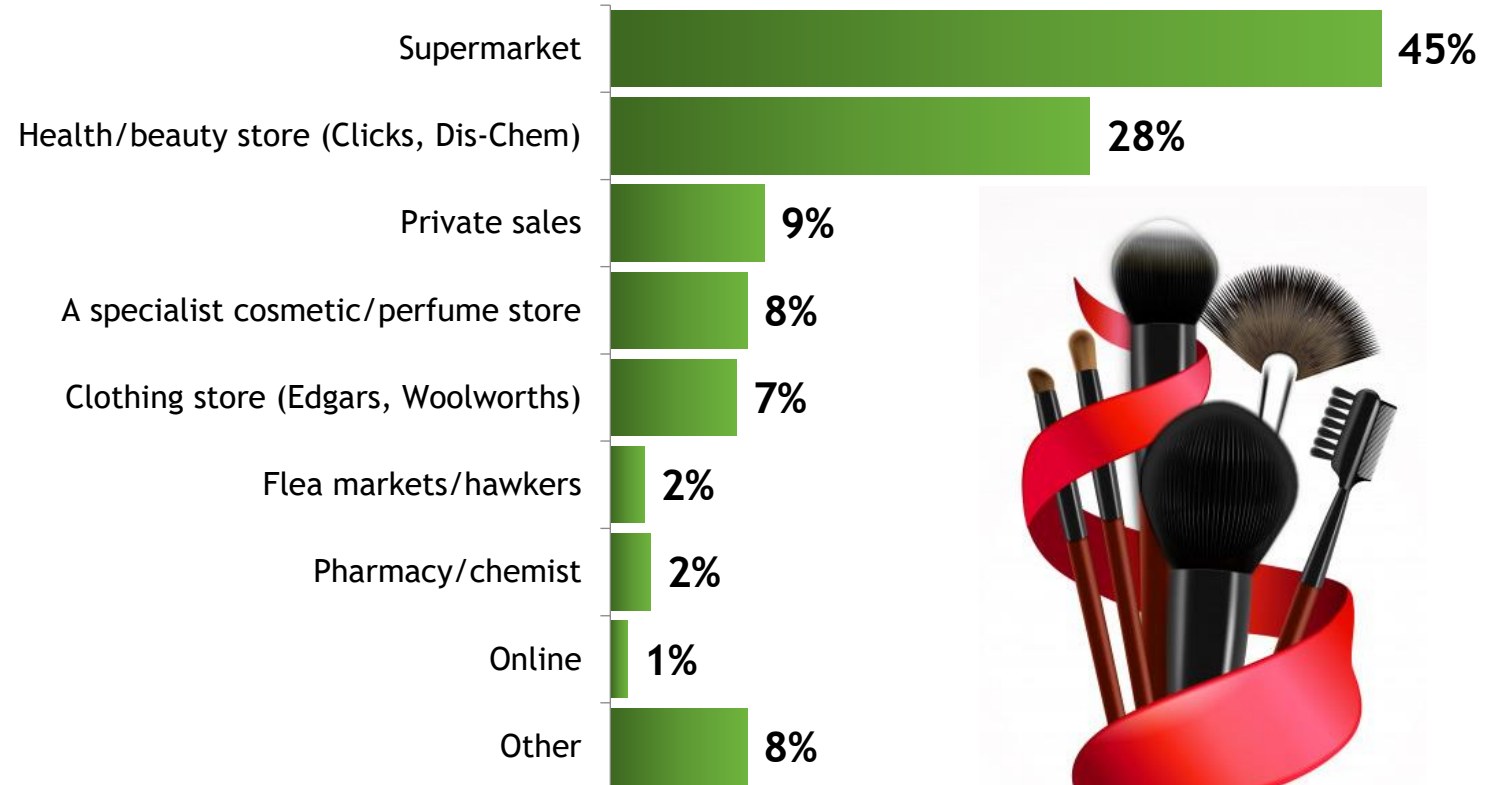


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Cosmetics Purchases



Where do you usually buy these cosmetic products?



GROCERIES

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Product Penetration

Dairy



PAST 4 WEEKS

Coffee/tea creamer	69%
Long-life milk	60%
Cheese	58%

PAST 7 DAYS

Fresh milk	63%
Yoghurt (including drinking yoghurt)	59%
Tub Margarine/butter	56%
Brick Margarine/butter	55%
Powdered milk	28%

Products chosen at random



* Data gathered during the national lockdown and could affect results.



Basic/Staple Food



PAST 4 WEEKS

Rice	87%
Mealie meal	83%
Flour	62%
Pasta	62%
White sugar	63%
Brown sugar	56%
Porridge	44%

PAST 7 DAYS

Bread	89%
-------	-----

Product Penetration



*Alcohol



PAST 7 DAYS

Beer	18%
Ciders	15%
Lite/light beer	15%
Wine (boxes)	13%
Vodka	10%
Whiskey	9%
Wine (bottles)	9%
Brandy	6%
Alcohol free	4%

Products chosen at random

Toiletries



PAST 4 WEEKS

Toothpaste	92%
Hand/body Soap	90%

PAST 7 DAYS

Body cream/lotion	90%
Anti-perspirant roll on	89%
Aerosol deodorant/anti-perspirant	59%
Bath additives	26%
Liquid body washes/shower gels	23%
Hair conditioner	20%
Hair styling products	19%

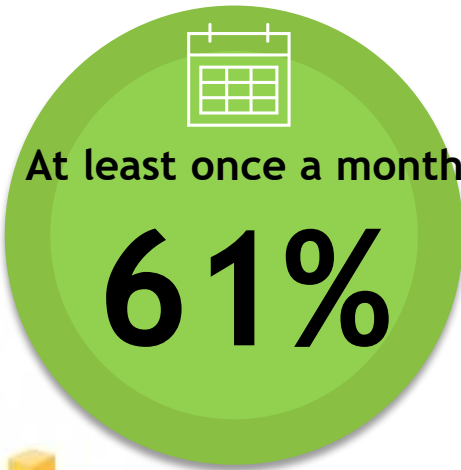


BEHAVIOUR



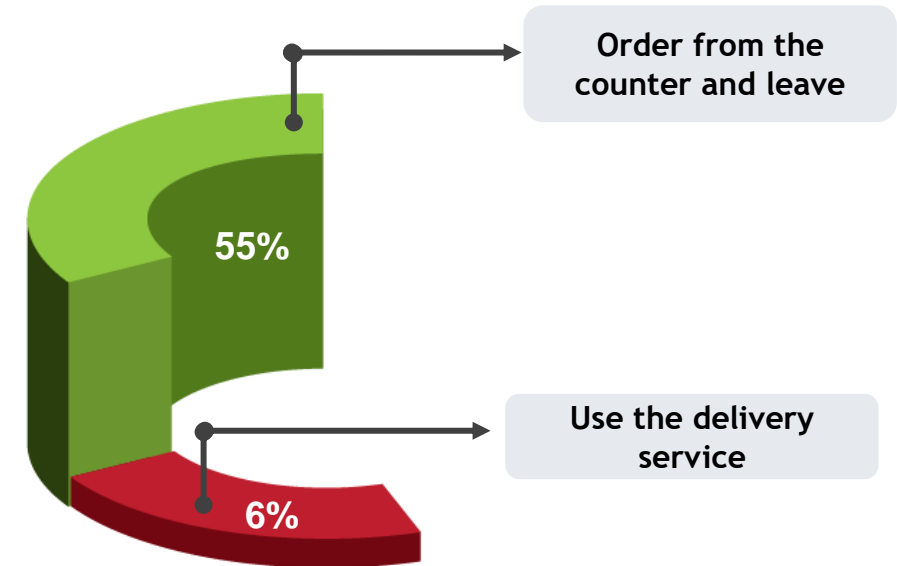
Behaviour: Fast food

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



Population Base is 41 872 108

How do you purchase take-aways?



Population Base is 34 158 288

Brand Loyalty



Do you always buy the same brands?

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

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

	YES		YES		YES
Groceries	42%	Groceries	45%	Groceries	35%
Toiletries	40%	Toiletries	36%	Toiletries	30%
Cosmetics	31%	Cosmetics	23%	Cosmetics	21%

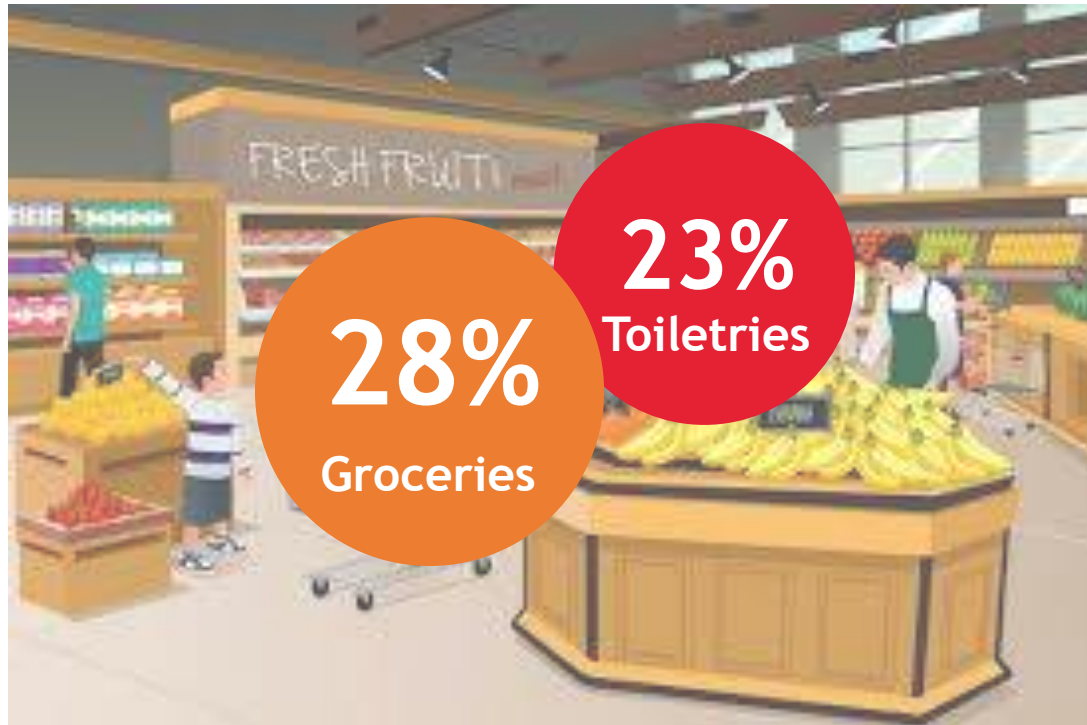
Population Base is 42 573 162



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%



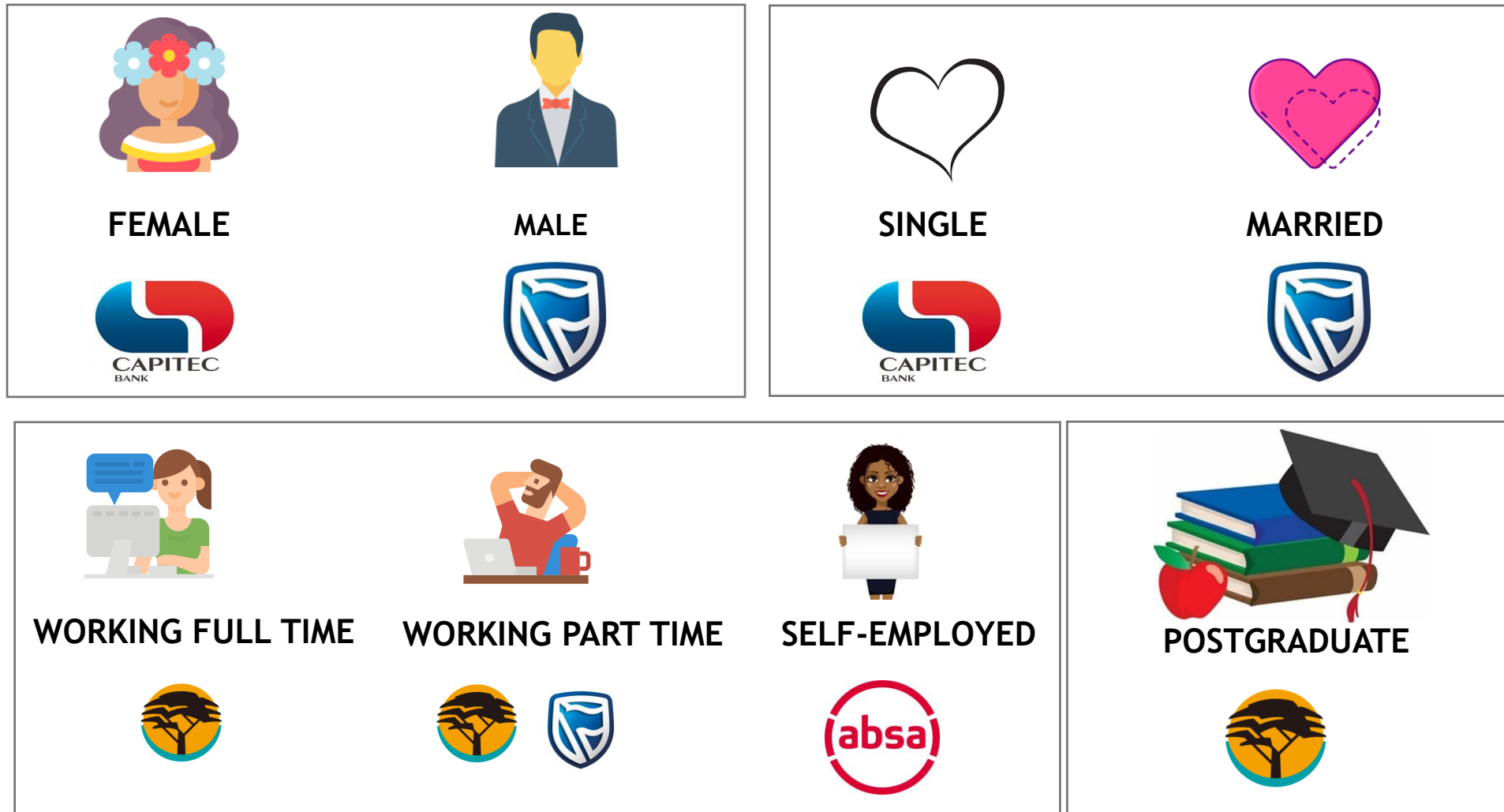


INSIGHTS

How can you use the data?



Preferred Bank Index: By Demographics



Short Term Insurance: Decision making and Influences on Decisions



*How decisions are made when purchasing
Home contents and vehicle insurance*



30% Ask advice from family members and friends

28% Do own research online

23% Call insurance companies for quotes

18% Use online comparison website

Universe: 5 000 000 - All insurance categories



*What was most important when purchasing
Home contents and vehicle insurance*

34% How well covered

27% Cost of monthly premium

25% Personal experience

23% Company reputation



Stokvel Participation Profile



Car Brand Preference: By Geography

Market Share



22%

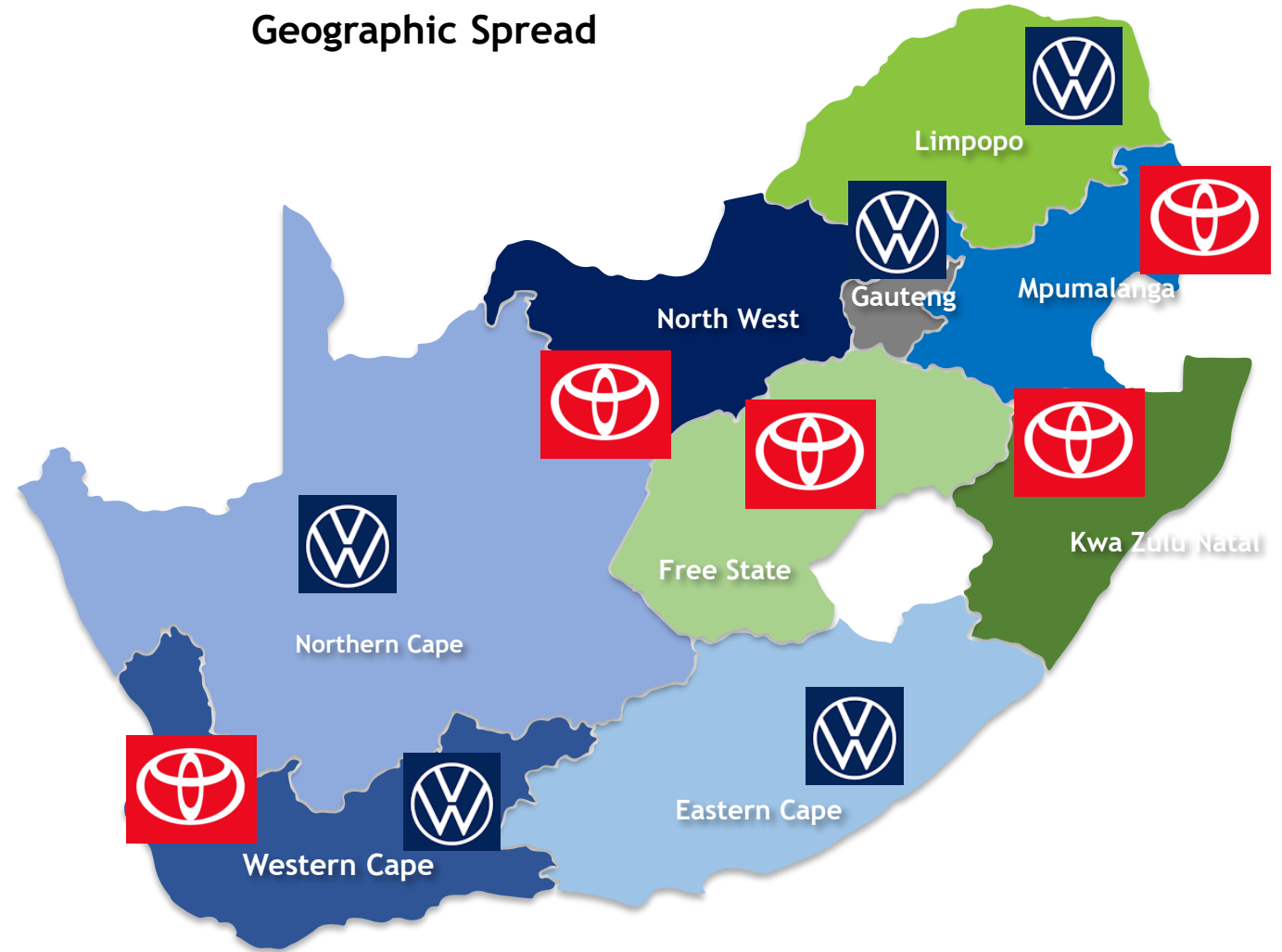


20%



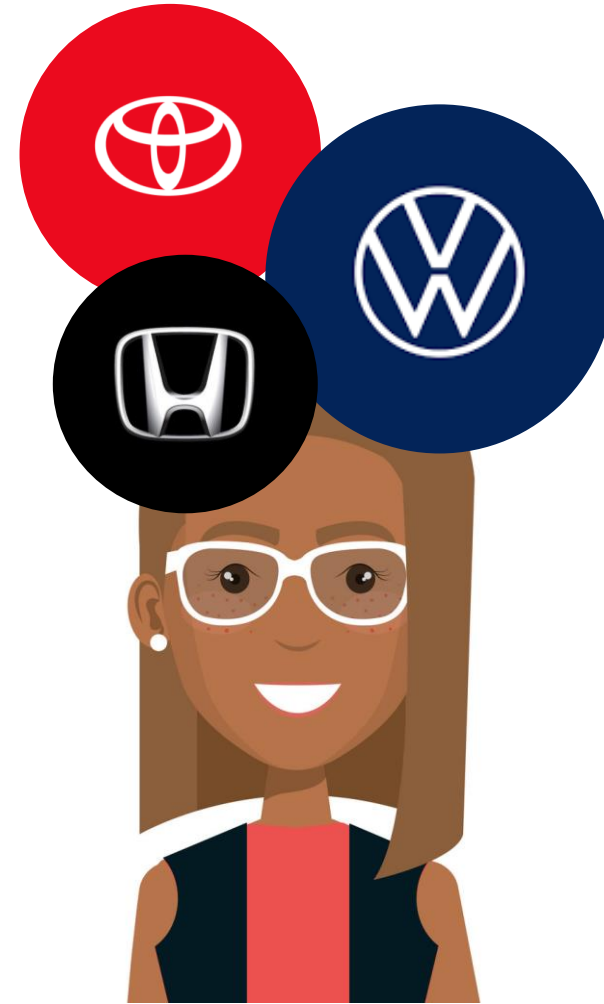
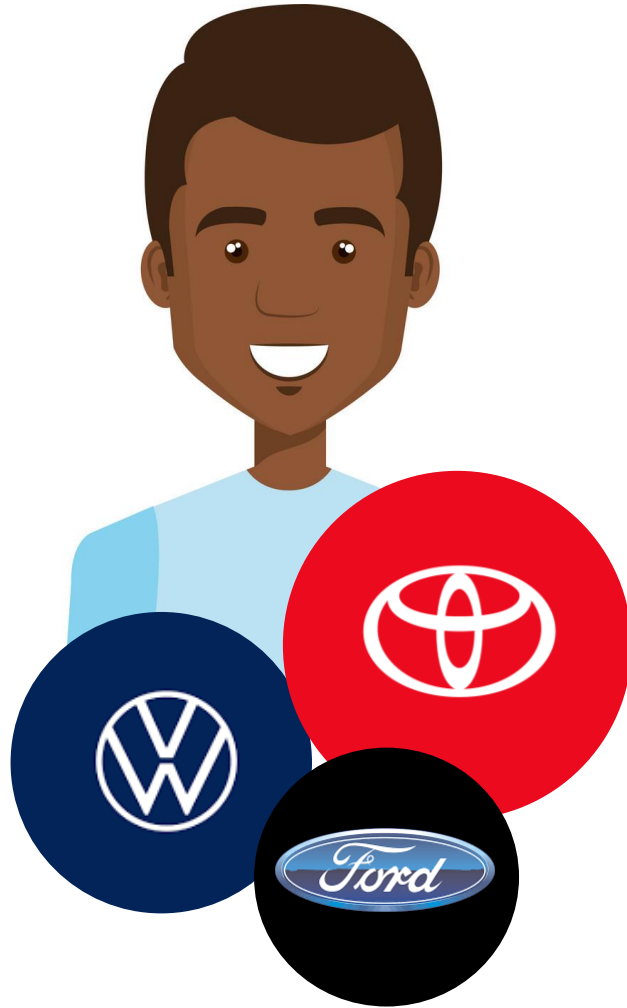
10%

Geographic Spread

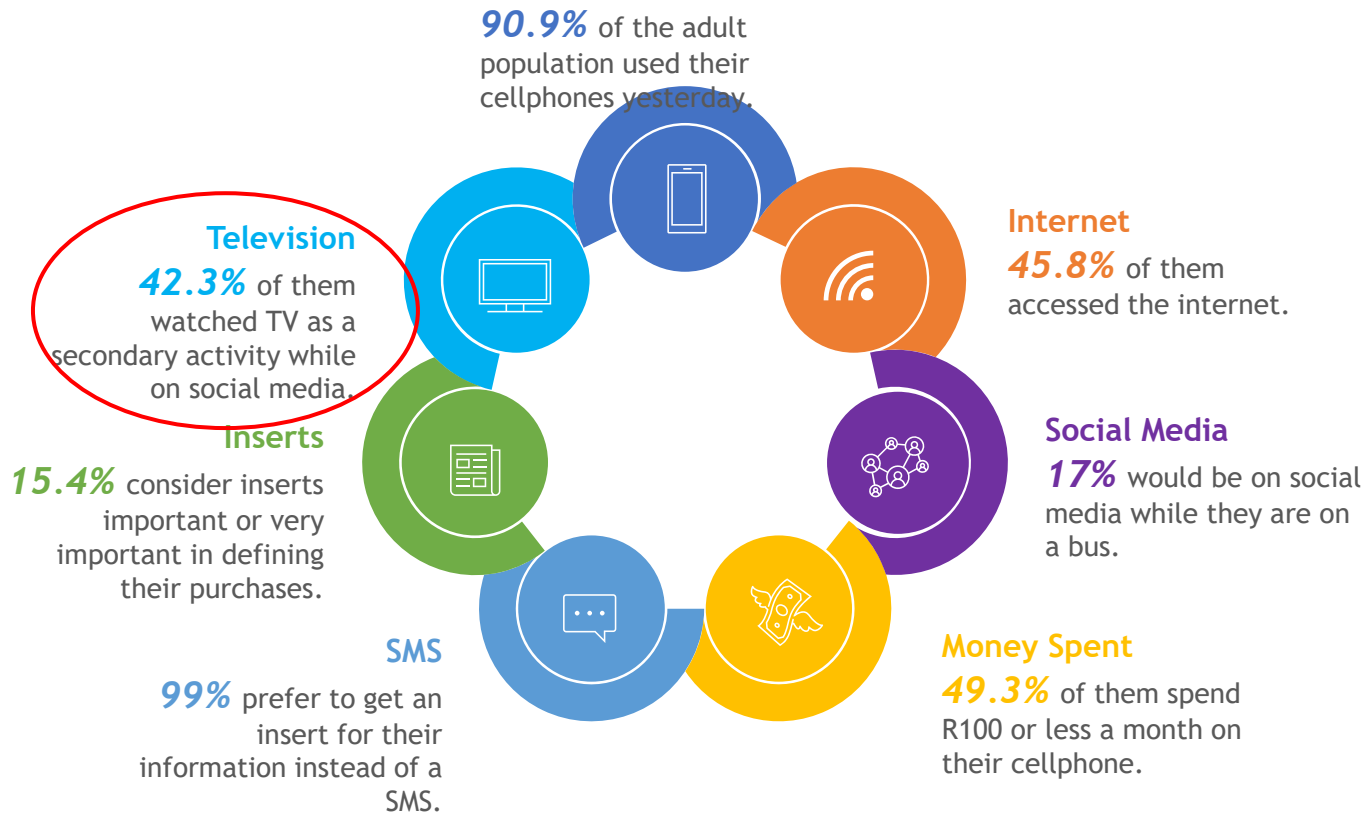


Car Brand Preference: By Demographics

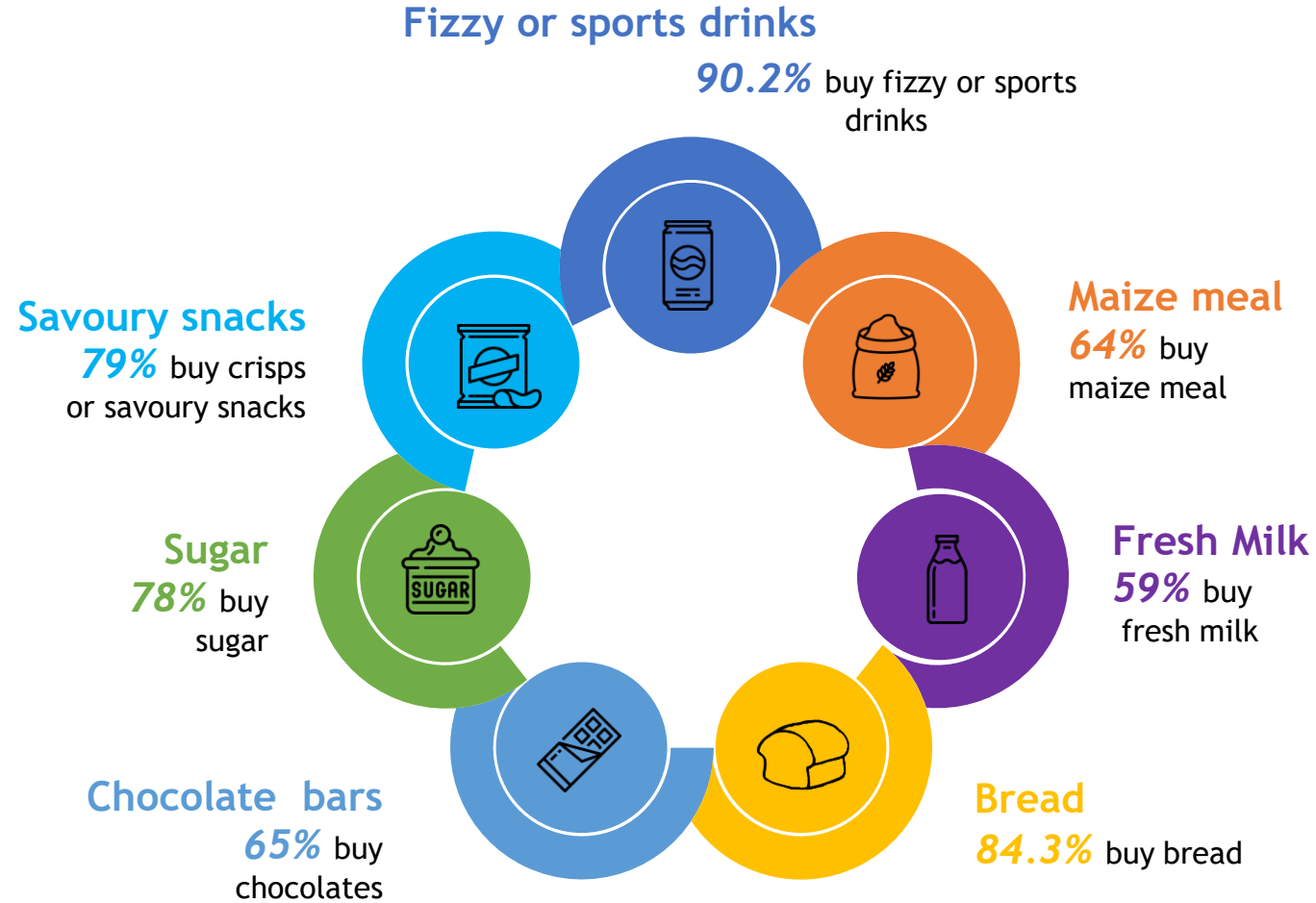
Gender



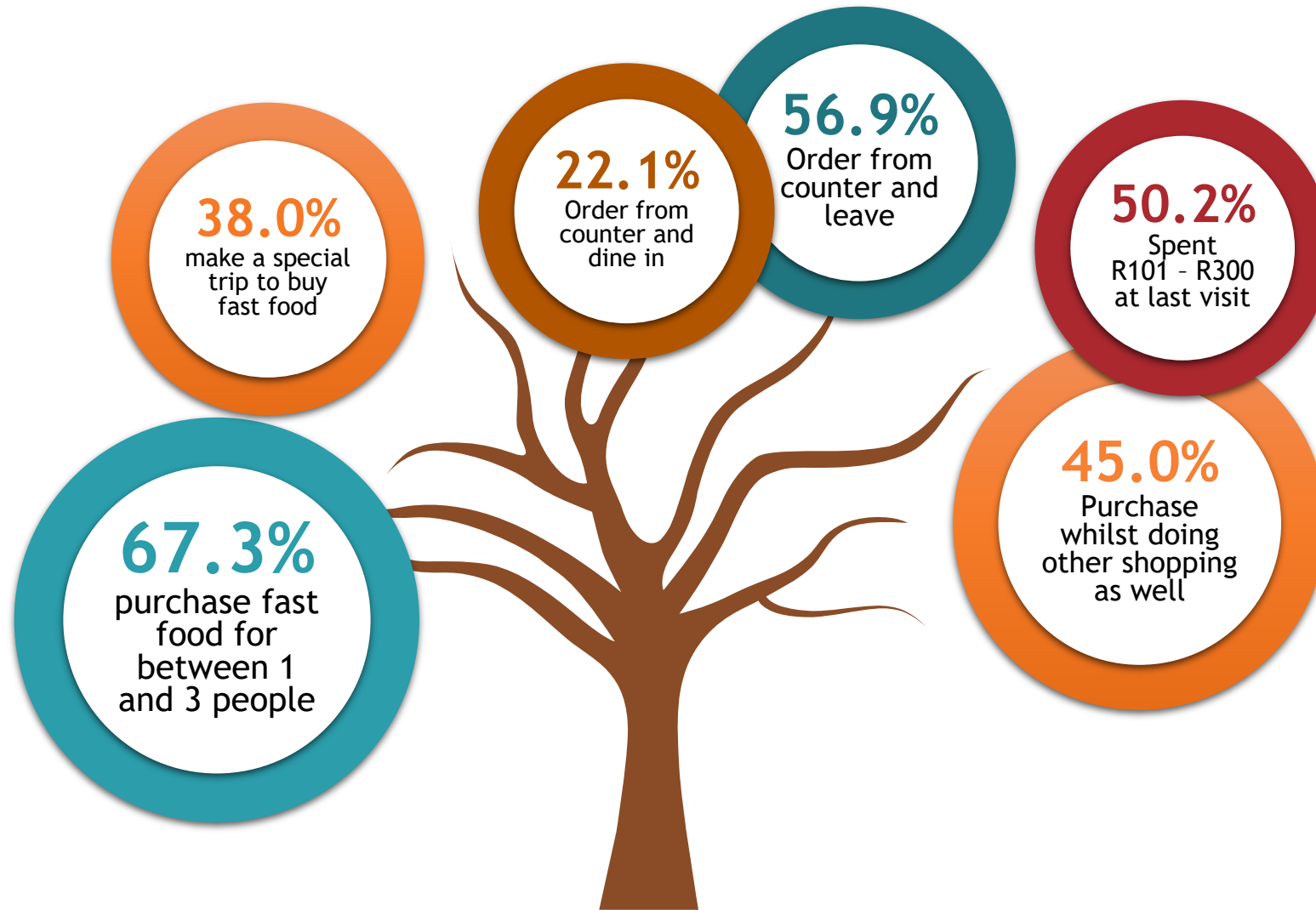
Behaviour Cellphone Users Yesterday



Purchases at forecourts



Behaviour Fast Food Outlet Users P4W



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

Nov 2021
Tracking study release

March 2022
1st calendar year data release

THANK
YOU

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