MAPS DATA OVERVIEW:

Waves 1 & 2

JULY 2020 – JUNE 2021
Important Definitions

DIP = 1 month = 1,667 interviews

CYCLE = a quarter = 5,001 interviews

WAVE = 6 months = 10,002 interviews
2 Waves = full year = 20,004 interviews

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
Cycles one, two, three and four of MAPS fieldwork were conducted and a sample of **20 049 face-to-face interviews and 10 672 leave behind questionnaires (diaries)** were administered.

Given the unpredictable nature of the trajectory of Lockdowns some dips had fewer fieldwork days than others. 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.
Fieldwork Timeline

Sample Achieved:
- 20,049 face-to-face interviews
- 10,672 leave behind questionnaires (diaries)

Alert Level 3
- 17 July 2020
- 25 June 2021

Alert Level 1
- 18 October 2020
- 2 April 2021
- 28 December 2020
- 18 January 2021

Wave 1 started
- 18 October 2020

End of Wave 1
- 28 December 2020

Start of Wave 2/Cycle 3
- 18 January 2021

End of Cycle 3
- 2 April 2021

Start of Cycle 2
- 28 December 2020

End of Cycle 4
- 25 June 2021

MAPS YEAR ONE

July 2020
Field work started

June 2021
Field work finished

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
What MAPS Covers

Life Stages and Life Style
- Demographics
- Income
- Employment
- Property Ownership
- Pet Ownership
- Interests and Hobbies
- Attitudes surrounding current affairs

Financials
- SASSA government grants
- Commercial banks
- Banking products and facilities
- Money transfer services
- Loyalty/rewards retail store programmes
- Medical aid schemes
- Investments (shares, unit trusts, burial societies, stokvels)
- Short-term and long-term insurance policies
- Purchase of items on credit and personal loans
- Behaviour (saving and loans)

Media Consumption
- Television
  - Linear/live TV watching
  - Viewed TV channels (past 4 weeks, past 7 days and yesterday)
  - Location of TV viewing
  - Satellite services/packages used
  - Type of TV decoder used
- Radio
  - Radio stations listened to (past 4 weeks, past 7 days and yesterday)
  - Average number of days/hours spent radio listening per week
- Print
  - Newspapers
  - Newspaper Inserts
  - Magazines
  - Store Magazines
- Cinema
- Outdoor Advertising
- Social Media

Purchasing Behaviour
- Online vs. retail shopping
- Grocery purchasing behaviours – bulk vs. daily
- Clothing purchasing behaviour
- House hold appliances
- Vehicles
- Fast-food consumption

Product Purchasing Behaviour
- Household groceries
- Snacks, biscuits and chips
- Household cleaning products
- Pet food
- Personal care items
- Clothing
- Alcohol and non-alcoholic beverages

Source: MAPS 2020/2021 (Jul ‘20 – June ’21)
HEALTH CHECK
Sampling

Area stratified, multi-stage probability sample. Enumerator Areas (EA) as the unit of sampling.

An independent, representative sample of EAs randomly drawn for each Dip (month) with additional substitution EAs provided:
- All provinces sampled
- All Metros sampled
- All Cities & Large towns sampled
- Distribution: 50% Metro | 30% Urban | 20% Rural

Weighted to population

Use of GIS mapping to validate EAs upfront.

GIS mapping is used to randomly select 8 visitation points (homesteads) and 4 possible substitution points in each EA.

Upfront use of GIS mapping for validation and verification greatly reduces the need for substitution.
Substitutions and Backchecks

Household Substitutions

Overall Substitution rate 12%

Substitutions required due to:

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

Backchecks

25% MAPS

15% Industry

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
Dwellings Visited
SAMPLE REPRESENTATIVENESS
Weighting is a process by which data is adjusted to be characteristic of the population profile. The amount of correction needed to match the population profile is measured inversely using the weighting efficiency score which ranges from 0 to 100%. A low efficiency score indicates a sample that poorly represents the population. A weighting efficiency of at least 70% indicates that the sample design is balanced and safe to apply.

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
Demographic Profile

**Age**

- 15-24: 27%
- 25-34: 24%
- 35-44: 18%
- 45-54: 14%
- 55-64: 9%
- 65-74: 5%
- 75+: 2%

*Weighted according to Stats SA 2020 population update

Average age of respondents is **37 years**

**Personal Income**

- No personal income: 7%
- R1-R999: 2%
- R10 000-R19 999: 6%
- R20 000-R29 000: 3%
- R30 000-R59 999: 13%
- R5000-R9999: 41%
- R10 000-R19 999: 15%
- R1000-R4999: 23%
- R5000-R9999: 23%
- R60 000+: 3%
- No household income: 2%

Average personal income: **R4,732**

**Household Income**

- No household income: 2%
- R1-R999: 4%
- R10 000-R19 999: 15%
- R20 000-R29 000: 7%
- R30 000-R59 999: 6%
- R5000-R9999: 23%
- R60 000+: 3%
- R10 000-R19 999: 15%
- R1000-R4999: 41%
- R5000-R9999: 23%
- R60 000+: 3%
- No household income: 2%

Average household income: **R11,714**

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
Demographic Profile

Generations

- Generation Z (2006-present) 0%
- Millennials (1986-2005) 53%
- Generation X (1965-1985) 31%
- Boomers (1946-1964) 13%
- Pre-Boomers (1945-earlier) 2%

Life Stages

- Mature Singles 11%
- Young Couples 3%
- Mature Families 5%
- Mature Couples 6%
- Young Singles 30%
- Young Families 13%
- Single Parent Families 31%

*Note: Percentages may not add up to 100% due to rounding off.

Source: MAPS 2020/2021 (Jul ’20 – June ’21)

Population 15+: 42 025 645
Demographic Profile

Employment Status:
*MAPS vs. STATS SA

- Not Economically Active:
  - MAPS: 11.99m
  - STATS SA: 13.50m

- Discouraged work seekers:
  - MAPS: 3.54m
  - STATS SA: 3.30m

- Unemployed:
  - MAPS: 11.45m
  - STATS SA: 7.80m

- Employed:
  - MAPS: 14.99m
  - STATS SA: 14.90m

Highest Level of Education Achieved

- Post graduate degree: 2%
- Undergraduate degree: 3%
- Diploma: 6%
- Post Matric certificate: 3%
- Pre-Matric certificate: 2%
- Matric completed: 35%
- Some high school: 38%
- Primary school completed: 4%
- Some primary school: 5%
- No schooling: 2%

*Comparing MAPS Cycle 4 vs Q2 2021 StatsSA figures

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
Demographic Profile

Age: Dependents (own children)

- 0-6: 24%
- 7-12: 19%
- 13-18: 16%
- 19-24: 9%

45% of respondents have dependents who are their own children.

Age: Other dependents (not own children)

- 0-6: 4%
- 7-12: 5%
- 13-18: 5%
- 19-24: 2%
- 25-34: 3%
- 35-49: 1%
- 50+: 3%

In total, about have 51% of all respondents have dependents.

17% of respondents have dependents who are not their own children.

Source: MAPS 2020/2021 (Jul '20 – June '21)
SEGMENTATION
Segmentation

LSM Segmentation
- Living Standards Measure 1 levels 1 - 10

SEM Segmentation
- Socio-Economic Measure levels 1 – 10
- Super Groups

Self Perceptions
- Self-perception of the consumer
  - Health Status
  - Parenting Scores

Demographics
- Average number of households in South Africa
- Average age of respondents
- Racial profiles of respondents
- Gender profiles of respondents
- Most spoken languages
- Marital status of respondents
- Highest level of education
- Dependents living in the household – own children
- Dependents living in the household – not own children
- Generation
- Life Stages

Income
- Personal income
- Household income
- Employment status

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
Living Standards Measure (LSM)

Source: MAPS 2020/2021 (Jul ‘20 – June ‘21)
Socio-Economic Measure (SEM)

Source: MAPS 2020/2021 (Jul ’20 – June ’21)

Population 15+: 42,025,645
Self Perception of the Consumer

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

- **Very low**
  - Avg. HHI: R8,549
  - Avg. Age: 40
  - 2%

- **Low**
  - Avg. HHI: R7,788
  - Avg. Age: 39
  - 10%

- **Lower middle**
  - Avg. HHI: R8,846
  - Avg. Age: 37
  - 23%

- **Middle**
  - Avg. HHI: R10,634
  - Avg. Age: 37
  - 45%

- **Upper middle**
  - Avg. HHI: R15,122
  - Avg. Age: 37
  - 13%

- **High**
  - Avg. HHI: R16,151
  - Avg. Age: 36
  - 5%

- **Very high**
  - Avg. HHI: R19,620
  - Avg. Age: 38
  - 2%
**Self Perception of the Consumer**

### Self score: Health status

- **1-4:**
  - Avg. HHI: R8,891
  - Avg. Age: 41
  - 9%

- **5-6:**
  - Avg. HHI: R10,266
  - Avg. Age: 38
  - 30%

- **7-8:**
  - Avg. HHI: R12,262
  - Avg. Age: 37
  - 33%

- **9-10:**
  - Avg. HHI: R13,269
  - Avg. Age: 36
  - 28%

### Self score: Parenting skills

- **1-4:**
  - Avg. HHI: R7,484
  - Avg. Age: 39
  - 8%

- **5-6:**
  - Avg. HHI: R9,754
  - Avg. Age: 38
  - 32%

- **7-8:**
  - Avg. HHI: R11,458
  - Avg. Age: 38
  - 23%

- **9-10:**
  - Avg. HHI: R13,782
  - Avg. Age: 39
  - 37%

Source: MAPS 2020/2021 (Jul ‘20 – June ’21)

Population: 42,025,645
Age and Household Income Bands

**Age group**
- 15 - 24 years: 27%
- 25 - 34 years: 24%
- 35+ years: 49%

**Household income**
- R1 - R9 999: 25%
- R10 000 - R39 999: 67%
- R40 000+: 6%
- No household income: 2%

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
Media

Print media
- Newspapers
- Magazines
- Store magazines
- Newspaper inserts
- Platform used

Radio
- Radio stations listened to (past 4 weeks, past 7 days and yesterday)
- Average number of days/hours spent radio listening per week
- Radio devices
- Location of radio listening

Cinema
- Cinema attendance
- Cinema chains
- Average amount spent per cinema outing
- Cinema benefit programmes

Television
- Linear/live TV watching
- Viewed TV channels (past 4 weeks, past 7 days and yesterday)
- Location of TV viewing
- Satellite services/packages used
- Type of TV decoder used
- TV audience during weekends
- TV catch-up viewing behaviour
- Streaming services

Online
- Social media
- Online content
- Streaming

Out of Home Advertising
- Time spent travelling on average day
- Places of travel
- Method of transport used
- Outdoor advertising signs
- Shopping malls visited

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
Media Population Penetration

Newspapers
Past 4 weeks: 43%

Newspaper Inserts
Past 4 weeks: 19%

Magazines
Past 4 weeks: 12%

Store Magazines
Past 4 weeks: 20%

Television (linear/live)
Past 4 weeks: 76%

Cinema
Past 4 weeks: 1%

Radio
Past 4 weeks: 75%

Out of Home Advertising
Past 4 weeks: 62%

Streaming Content
Past 4 weeks: 15%

Social Media
Past 4 weeks: 54%

*54% excluding WhatsApp
57% including WhatsApp

Various timelines available
- 3 months
- 4 weeks
- 7 days
- yesterday

Source: MAPS 2020/2021 (Jul '20 – June '21)
Population 15+: 42 025 645
Media Consumption [All platforms]

Past 4 weeks

76% Television
75% Radio
58% Internet
54% Social media
42% Newspapers
22% Television
13% Magazines
12% Streaming content
1% Cinema

Avg. Age

37 38 31 30 37

Television Radio Internet Social media Newspapers

R11 638 R12 382 R14 862 R14 824 R14 913

R12 690 R15 676 R15 676 R24 590 R25 723

Source: MAPS 2020/2021 (Jul ‘20 – June ’21)
Media Consumption by Age Groups

Past 4 weeks

Television
- 15 - 24 years: 28%
- 25 - 34 years: 24%
- 35+ years: 48%

Radio
- 15 - 24 years: 25%
- 25 - 34 years: 25%
- 35+ years: 50%

Internet
- 15 - 24 years: 37%
- 25 - 34 years: 29%
- 35+ years: 34%

Newspapers
- 15 - 24 years: 39%
- 25 - 34 years: 30%
- 35+ years: 31%

Social Media
- 15 - 24 years: 39%
- 25 - 34 years: 30%
- 35+ years: 31%

Magazines
- 15 - 24 years: 28%
- 25 - 34 years: 23%
- 35+ years: 50%

Streaming
- 15 - 24 years: 39%
- 25 - 34 years: 30%
- 35+ years: 32%

Cinema
- 15 - 24 years: 36%
- 25 - 34 years: 38%
- 35+ years: 26%

Television
- 15 - 24 years: 25%
- 25 - 34 years: 25%
- 35+ years: 50%

Radio
- 15 - 24 years: 25%
- 25 - 34 years: 25%
- 35+ years: 50%

Note: Percentages may not add up to 100% due to rounding off.

Past 4 weeks

n=6 233 895

n=4 836 978

n=3 142 137

n=2 468 354

Source: MAPS 2020/2021 (Jul '20 – June '21)

Population 15+: 42 025 645

n=6 233 895

n=3 208 2679

n=8 398 573

n=4 836 978

n=3 142 137

n=2 468 354

n=2 204 9422

n=2 249 268

n=6 056 49

n=8 398 573

n=3 208 2679

n=8 398 573

n=3 208 2679

n=8 398 573
Past 4 weeks

**Television**
- R1-R9 999: 59%
- R10 000-R39 999: 21%
- R40 000+: 5%
- No household income: 1%

**Social Media**
- R1-R9 999: 58%
- R10 000-R39 999: 31%
- R40 000+: 9%
- No household income: 1%

**Newspapers**
- R1-R9 999: 65%
- R10 000-R39 999: 26%
- R40 000+: 7%
- No household income: 2%

**Radio**
- R1-R9 999: 58%
- R10 000-R39 999: 31%
- R40 000+: 9%
- No household income: 1%

**Internet**
- R1-R9 999: 58%
- R10 000-R39 999: 31%
- R40 000+: 9%
- No household income: 1%

**Streaming**
- R1-R9 999: 42%
- R10 000-R39 999: 33%
- R40 000+: 25%

**Cinema**
- R1-R9 999: 63%
- R10 000-R39 999: 63%
- R40 000+: 29%

**Magazines**
- R1-R9 999: 63%
- R10 000-R39 999: 63%
- R40 000+: 29%

**Store Magazines**
- R1-R9 999: 63%
- R10 000-R39 999: 63%
- R40 000+: 29%

Note: Percentages may not add up to 100% due to rounding off.

Source: MAPS 2020/2021 (Jul '20 – June '21)

Population 15+: 42 025 645

n=32 082 679
n=4 836 978
n=8 398 573
n=24 268 354
n=605 649
n=8 398 573
Television Audience

Television audience [Yesterday, P7D, P4W]

- Past 4 weeks: 76%
- Past 7 days: 75%
- Yesterday: 66%

Source: MAPS 2020/2021 (Jul ‘20 – June ’21)
Top Television Viewing

Past 4 weeks

TV Penetration 76%

Top TV Channels

Avg. HHI

17.19m
R8 742
38

12.39m
R9 380
39

9.35m
R9 813
37

8.59m
R9 290
38

5.40m
R25 567
30

Avg. Age

SABC 1
SABC 2
e.tv
SABC 3
Netflix

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
**Behaviour: Television**

### Top TV viewing location: Past 7 days
- In my home: 20.50m
- In someone else's home: 4.20m
- At work: 0.34m

### Live TV vs. Streaming Services: P4W
- Live TV viewing: 32.08m
- YouTube viewing: 14.05m
- Netflix viewing: 5.40m
- Other video subscription services viewing: 2.46m

### PVR: Usual mode for watching TV programmes
- Mostly view live or in real time: 2.84m
- Mostly watch recorded or catch TV at another time: 1.20m

Source: MAPS 2020/2021 (Jul '20 – June '21)
Radio Listenership

Past 4 weeks: 75%
Past 7 days: 71%
Yesterday: 58%

Source: MAPS 2020/2021 (Jul '20 – June '21)
Radio Reach [Yesterday]

### Age

- **15 - 24 years**: 22%
- **25 - 34 years**: 26%
- **35+ years**: 53%

Total: 58%

### Household Income

#### National
- **R1 - R9 999**: 64%
- **R10 000 - R39 999**: 27%
- **R40 000+**: 7%
- **No household income**: 1%

#### Regional
- **R1 - R9 999**: 63%
- **R10 000 - R39 999**: 28%
- **R40 000+**: 9%
- **No household income**: 1%

#### Community
- **R1 - R9 999**: 66%
- **R10 000 - R39 999**: 28%
- **R40 000+**: 5%
- **No household income**: 1%

Source: MAPS 2020/2021 (Jul '20 – June '21)

Note: *Percentages not adding up to 100% due to rounding off*
Top Radio Stations Listened to
Past 4 weeks

Radio [Over All]

- Radio Over All
- Avg. HHI

<table>
<thead>
<tr>
<th>Station</th>
<th>Listeners</th>
<th>Avg. HHI</th>
</tr>
</thead>
<tbody>
<tr>
<td>R10</td>
<td>5,60m</td>
<td>R10 546</td>
</tr>
<tr>
<td>R16</td>
<td>3,92m</td>
<td>R16 362</td>
</tr>
<tr>
<td>R7</td>
<td>3,82m</td>
<td>R7 139</td>
</tr>
</tbody>
</table>

Avg. Age:
- Radio Over All: 36
- Community Radio Stations: 36

COMMUNITY

- Community Radio Stations
- Avg. HHI

<table>
<thead>
<tr>
<th>Station</th>
<th>Listeners</th>
<th>Avg. HHI</th>
</tr>
</thead>
<tbody>
<tr>
<td>R13</td>
<td>592.5K</td>
<td>R13 452</td>
</tr>
<tr>
<td>R15</td>
<td>493.0K</td>
<td>R15 171</td>
</tr>
<tr>
<td>R9</td>
<td>354.9K</td>
<td>R9 005</td>
</tr>
</tbody>
</table>

Avg. Age:
- Community Radio Stations: 44, 39, 40

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
### Behaviour: Radio

**Usual radio device**
- Radio (portable radio, hi-fi): 44%
- Cell phone/tablet: 23%
- TV: 10%
- Car radio: 9%
- Computer/laptop: 0%

**Usual location for radio listening**
- In my home or someone else’s home: 68%
- In my own or someone else’s car, a taxi, bus, train, bicycle or on foot: 11%
- At my work place: 5%

**Time spent on radio listening**
- Less than 10 hours per week: 34%
- 10 to 20 hours per week: 16%
- More than 20 hours per week: 21%

**Radio related internet activities: Past 4 weeks**
- Download music: 32%
- Listen to radio via website or app: 10%
- Download podcasts or vodcasts: 6%

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
NEWSPAPERS
Newspaper Readership

Newspaper Readership [Yesterday, P7D, P4W]

- Past 4 weeks: 43%
- Past 7 days: 37%
- Yesterday: 14%

Source: MAPS 2020/2021 (Jul '20 – June '21)
Top 3 Newspapers [Dailies] Read

Past 3 months

46% respondents have read newspapers in the past 3 months.

Platforms used to read newspapers [Dailies and Weeklies]

- **On Paper**: 84%
- **Online**: 20%

**Daily Sun**
- Avg. Age: 35
- HHI: R11 981
- Circulation: 5.35m

**Isolezwe**
- Avg. Age: 33
- HHI: R12 641
- Circulation: 3.00m

**Sowetan**
- Avg. Age: 37
- HHI: R13 334
- Circulation: 1.33m

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
Top 3 Newspapers [Weeklies] Read

- Sunday Times: 950,6K, R25,778, 42
- Soccer Laduma: 684,3K, R10,431, 33
- City Press: 615,6K, R13,182, 36

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
MAGAZINES
Magazine Readership

Magazine Readership [Yesterday, P7D, P4W]

- Past 4 weeks: 12%
- Past 7 days: 9%
- Yesterday: 3%

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
Top 3 Magazines Read
Past 3 months

13% respondents have read magazines in the past 3 months.

Platforms used to read magazines:
- 83% On Paper
- 20% Online

Top Magazines Read

- HUISgenoot: 1,10m (R12 970, Avg Age 45)
- YOU: 0,93m (R18 928, Avg Age 41)
- Kuier: 0,39m (R13 223, Avg Age 52)

Source: MAPS 2020/2021 (Jul ‘20 – June ‘21)
STORE MAGAZINES
Store Magazine Readership

Store Magazine Readership [Yesterday, P7D, P4W]

Past 4 weeks: 20%
Past 7 days: 15%
Yesterday: 4%

Source: MAPS 2020/2021 (Jul '20 – June '21)
Top 3 Store Magazines Read

Past 3 months

Platforms used to read store magazines

22% respondents have read store magazines in the past 3 months.

Top Store Magazines

Average Household Income

R15 520
R14 741
R16 073

2.23m
1.55m
0.79m

Fresh Living
Jet Club
Edgars Club

Avg. Age

40
35
33

93% On Paper
10% Online

Past 3 months

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
NEWSPAPER INSERTS READ

In the past 4 weeks, did you read newspaper inserts?

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

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

- Yes: 19%
- No: 81%

1. Not important
2. Very important
3. Important
4. Very important
5. Not important

Source: MAPS 2020/2021 (Jul ’20 – June ’21)

Population 15+: 42,024,645
Cinema Audience

Cinema Audience [Yesterday, P7D, P4W]

- Past 4 weeks: 347.9 K
- Past 7 days: 230.5 K
- Yesterday: 27.3 K

Source: MAPS 2020/2021 (Jul '20 – June '21)
Cinema Visits

3% of respondents have gone out to the cinema in the past 6 months.

Average number of people that go out on each cinema outing: 3

**Average cinema outing cost:** R367 for 3 people

- **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**

Source: MAPS 2020/2021 (Jul '20 – June '21)
OUT OF HOME ADVERTISING
Most Viewed Advertising Signs
Past 4 weeks

- Billboards on the side of the road: 48%, R14 715
- Street poles or street name signage: 45%, R14 497
- Dustbins on the side of the road: 39%, R14 105
- Branding or advertising on the outside of taxis: 36%, R14 350
- Digital billboards on the side of the road: 31%, R15 890
- Billboards or signs inside an airport: 6%

Avg. Age:
- Billboards on the side of the road: 35
- Street poles or street name signage: 35
- Dustbins on the side of the road: 36
- Branding or advertising on the outside of taxis: 35
- Digital billboards on the side of the road: 36
- Billboards or signs inside an airport: 35

Source: MAPS 2020/2021 (Jul '20 – June '21)
SOCIAL MEDIA
Top 5 Social Media Sites Visited

Yesterday

Average Age

Top Social media sites

Avg. HHI

- Top Social media sites
- Avg. HHI

20.97m

S

17.97m

R25 291

2.19m

R25 017

R20 825

R15 856

R14 181

R20 757

Avg. HHI

Avg. Age

31

30

27

29

29

26

4.35m

3.88m

1.79m

2.19m

Source: MAPS 2020/2021 (Jul ’20 – June ’21)

Population 15+ 42 025 645
MULTIPLATFORM BEHAVIOUR
Multiplatform Behaviour

While watching live TV, which secondary activity do you engage in?

- Surfing the Internet: 17%
- Reading Magazine: 14%
- Playing Games: 8%
- Watching traditional TV: 7%
- Streaming Content: 7%
- Social media: 6%
- Listening to Radio: 3%
- Reading Newspaper: 2%

While streaming content, which secondary activity do you engage in?

- Social media: 43%
- Watching traditional TV: 15%
- Listening to Radio: 15%
- Reading Magazine: 9%
- Playing Games: 4%
- Streaming Content: 4%
- Surfing the Internet: 4%
- Reading Newspaper: 3%

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

- Social media: 33%
- Watching traditional TV: 17%
- Playing Games: 14%
- Reading Magazine: 11%
- Streaming Content: 8%
- Surfing the Internet: 8%
- Reading Newspaper: 8%
- Reading Magazine: 6%

While on social media, which secondary activity do you engage in?

- Social media: 41%
- Listening to Radio: 32%
- Surfing the Internet: 9%
- Streaming Content: 7%
- Playing Games: 6%
- Reading Newspaper: 6%
- Reading Magazine: 5%
- Watching traditional TV: 3%
Multiplatform Behaviour

While reading a newspaper, which secondary activity do you engage in?

- Listening to Radio: 24%
- Social media: 13%
- Watching traditional TV: 11%
- Streaming Content: 4%
- Playing Games: 3%
- Reading Magazine: 2%
- Surfing the Internet: 2%

While reading a book, which secondary activity do you engage in?

- Listening to Radio: 17%
- Social media: 10%
- Watching traditional TV: 7%
- Streaming Content: 3%
- Reading Newspaper: 2%
- Surfing the Internet: 2%
- Playing Games: 2%
- Reading Magazine: 1%

While surfing the internet, which secondary activity do you engage in?

- Social media: 17%
- Listening to Radio: 16%
- Watching traditional TV: 11%
- Streaming Content: 5%
- Reading Newspaper: 3%
- Playing Games: 3%
- Reading Magazine: 2%

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
**Cellphones and Household Entertainment**

**Cellphone Purchasing Behaviour**
- How many Cellphones are there in the household
- Are these devices currently in use
- What is the preferred method for purchasing these devices, i.e. on a contract, cash etc.

**Top Cellphone Brands**
- What is the preferred cellphone brand purchased by the respondents
  - Primary Device
  - Secondary Device

**Top Cellular Networks**
- What is the preferred network used by the respondents
  - For the primary device
  - For the secondary device

**Average Monthly Spend**
- Contract vs. prepaid
- Data and internet charges
- Subscription services
- Do they have to top up on data or minutes during the month

**Household Entertainment**
- Internet Access in the Home
- Interests, hobbies and activities
- Streaming

**Top Internet Service Provider**
- What is the preferred ISP used by respondents
- Do they have fibre or WiFi in their homes
- How do they access the internet on devices other than their cellphone

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
Top 4 Cellular Networks

- Vodacom: 45%
- MTN: 40%
- Cell C: 15%
- Telkom Mobile: 13%

Cell phone access: 96%

Average number of cell phones in household: 3.8
Average number of cell phones used by an individual: 1.2

Source: MAPS 2020/2021 (Jul ‘20 – June ’21)
Top Cellphone Brands Used

- Samsung: 33%
- Huawei: 16%
- Nokia: 16%
- HUAWEI: 6%
- LG: 5%
- Telkom: 4%
- iPhone: 3%

Samsung vs. Huawei vs iPhone Users

- Samsung: Avg. Age 34, Avg. HHI R14 533
- Huawei: Avg. HHI R17 258
- iPhone: Avg. HHI R34 646

Source: MAPS 2020/2021 (Jul '20 – June '21)
### Phone brand vs. Network Preference

<table>
<thead>
<tr>
<th>Network provider</th>
<th>Cellphone Brand</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>SAMSUNG</td>
</tr>
<tr>
<td>vodacom</td>
<td>35%</td>
</tr>
<tr>
<td>MTN</td>
<td>34%</td>
</tr>
<tr>
<td>CELL©</td>
<td>14%</td>
</tr>
<tr>
<td>Telkom Mobile</td>
<td>16%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>13.9mil</strong></td>
</tr>
</tbody>
</table>

Source: MAPS 2020/2021 (Jul ‘20 – June ‘21)
Financial Services

Commercial Banking

- Banking products and facilities
- What kinds of traditional banking products do consumers make use of
  - Number of cheque, transactional, saving accounts etc.
- Do consumers make use of additional services offered by their banks
  - Loans, insurance, loyalty programmes, etc.
- Who is the preferred bank used by the respondents

Financial Services

- Do respondents make use of services such as eWallet, CashSend, mpesa etc.
- Do respondents make use of loyalty programmes
- Store accounts
- Medical aid schemes
- Insurance
  - Who is the preferred provider for:
    - Long-term policies
    - Short-term policies
- Saving behaviour:
  - What do respondents save money towards
  - Investment
  - Unit trusts and stocks
  - Credit purchasing on durable items
  - Loans
    - What are the reasons consumers take out loans

Stokvels

- Do respondents belong to a stokvel
- How many stokvels do respondents belong to
- What is the purpose of the stokvel:
  - Savings
  - Groceries
  - Burial

SASSA Government Grants

- How many of the respondents are SASSA beneficiaries
- What type of grants are they receiving

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
Banked Population

Age

- 15 - 24 years: 24%
- 25 - 34 years: 28%
- 35+ years: 49%

Household Income

- R1 - R9 999: 63%
- R10 000 - R39 999: 28%
- R40 000+: 8%
- No household income: 1%

Banked Population

- Excluding SASSA grants: 69.2%
- Including SASSA grants: 79.4%

Note: Percentages may not add up to 100% due to rounding off.

Source: MAPS 2020/2021 (Jul '20 – June '21)
Top Primary Banks Used

- **Bank into which salary or most income is paid**
- **Avg. HHI**

**Online banking users**
**past 4 weeks:**

- **YES**
- **24%**

**Avg. Age**
- 33
- 39
- 42
- 43
- 39
- 33

**Top Primary Banks Used**
- **36%**
- **R11 438**
- **R18 775**
- **R16 633**
- **R16 243**
- **R15 822**
- **R10 778**

**Source:** MAPS 2020/2021 (Jul ’20 – June ’21)
Short-Term Insurance: Top Providers

Short-term insurance providers

- OUT generalize
- Santam
- Discovery
- Absa iDirect
- Standard Bank/Stanbic Insurance
- Old Mutual
- MiWay
- AUTO general
- Budget
- Sanlam

Short Term Insurance penetration into Pop

1.6m

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
Stokvel Participation

Do you belong to a Stokvel?

YES 4.6m

How many stokvels do you belong to?

1 2 3 4
3.3m 907K 179K 260K

Most common type of stokvel

Type of stokvel  Avg. HHI
Savings  2.76m  R11 181
Grocery  1.56m  R9 679
Burial  0.36m  R10 461

Average contribution per month

R710

Avg. Age

Savings  39
Grocery  43
Burial  49

Avg. Age 39 43 49

Source: MAPS 2020/2021 (Jul '20 – June '21)
## Access to Financial Services

<table>
<thead>
<tr>
<th>Financial Services</th>
<th>Average Age</th>
<th>Average Monthly HH Income</th>
<th>Population size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loyalty/rewards retail store cards</td>
<td>39</td>
<td>R14 105</td>
<td>19.5mil</td>
</tr>
<tr>
<td>Funeral insurance</td>
<td>43</td>
<td>R12 168</td>
<td>16.3mil</td>
</tr>
<tr>
<td>SASSA government grant</td>
<td>43</td>
<td>R7 185</td>
<td>14.2mil</td>
</tr>
<tr>
<td>Money transfer service</td>
<td>36</td>
<td>R15 592</td>
<td>8.0mil</td>
</tr>
<tr>
<td>Retail store cards for credit purchase</td>
<td>37</td>
<td>R14 135</td>
<td>8.0mil</td>
</tr>
<tr>
<td>Medical aid schemes</td>
<td>40</td>
<td>R29 657</td>
<td>4.2mil</td>
</tr>
</tbody>
</table>

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
## Access to Financial Services Cont.

<table>
<thead>
<tr>
<th>Financial Services</th>
<th>Average Age</th>
<th>Average Monthly Household Income</th>
<th>Population size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit purchase on durable items e.g., furniture, household appliances (past 12 months)</td>
<td>38</td>
<td>R17 331</td>
<td>3.4mil</td>
</tr>
<tr>
<td>Life insurance</td>
<td>43</td>
<td>R25 787</td>
<td>2.9mil</td>
</tr>
<tr>
<td>Personal loans (past 12 months)</td>
<td>42</td>
<td>R16 585</td>
<td>1.4mil</td>
</tr>
<tr>
<td>Investment in the stock exchange</td>
<td>35</td>
<td>R27 938</td>
<td>1.0mil</td>
</tr>
<tr>
<td>Investment in unit trusts</td>
<td>41</td>
<td>R36 109</td>
<td>882k</td>
</tr>
</tbody>
</table>

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
**Behaviour: Saving and Personal loans**

**Do you invest or save money?**

- **YES 30%**

**How often do you invest or save?**

- Weekly: 17%
- Monthly: 31%
- Quarterly: 18%
- Every six months: 17%
- Annually: 17%

**Have you taken out a personal loan in the past 12 months?**

- **YES 3%**

**Purpose for loan (past 12 months)**

- Home Renovations: 483.1K
- Financial assistance for family and friends: 291.6K
- Education: 159.3K
- Vehicle: 89.5K
- Medical: 63.7K
- Travel: 58.1K
- Personal issues: 44.0K
- Small business start-up: 20.9K
- Wedding: 14.4K
- Other: 149.4K

Source: MAPS 2020/2021 (Jul '20 – June '21)
Automotive

Automotive Purchasing Behaviour

• How many vehicles are there in the household
• Are these vehicles currently in use
• Are these vehicles used for business or personal reasons
• How many vehicles does the respondent personally own
• Purchasing of new vehicles
  • What are the brand preferences
  • The types of vehicles that are preferred i.e. hatchbacks, sedans, bakkies, etc.
• Purchasing of second-hand vehicles
  • What are the brand preferences
  • The types of vehicles that are preferred i.e. hatchbacks, sedans, bakkies, etc.

Automotive Driving Behaviour

• What is the average monthly spend on:
  • Fuel
  • Insurance
• Who pays for the vehicles fuel and insurance
• What is the average monthly km driven
• Does the car have a security tracking device installed
• Who is the service provider of the security tracking device
Motor Vehicles Per Household

37% of households have motor vehicles

- **24%** Own 1 car
- **7%** Owns 2 cars
- **5%** Owns 3 or more cars

SA Household Population: **17,159 million households**

Source: MAPS 2020/2021 (Jul ‘20 – June ‘21)
Top Car Brands Driven

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

- **Make of vehicle**
- **Avg. HHI**

<table>
<thead>
<tr>
<th>Make of Vehicle</th>
<th>Avg. HHI</th>
<th>Avg. Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOYOTA</td>
<td>836.3K</td>
<td>44</td>
</tr>
<tr>
<td>Volkswagen</td>
<td>818.7K</td>
<td>40</td>
</tr>
<tr>
<td>Ford</td>
<td>369.0K</td>
<td>45</td>
</tr>
<tr>
<td>HYUNDAI</td>
<td>321.8K</td>
<td>47</td>
</tr>
<tr>
<td>NISSAN</td>
<td>286.3K</td>
<td>51</td>
</tr>
<tr>
<td>MERCEDES</td>
<td>215.2K</td>
<td>46</td>
</tr>
<tr>
<td>BMW</td>
<td>153.8K</td>
<td>39</td>
</tr>
</tbody>
</table>

Source: MAPS 2020/2021 (Jul '20 – June '21)
Retail

Household Purchasing Behaviour

- Who is responsible for the purchasing of goods for the household
- Do they purchase groceries in:
  - Bulk with fill ups
  - Twice monthly
  - Do a bulk shop annually
  - On a daily or weekly basis
- Do they have a preferred mall or shopping centre
- Do respondents have a preference for ecommerce outlets
- Who is the preferred retailer for:
  - Groceries
  - Cosmetics and toiletries
  - Liquor
  - Appliances and large items

Products and Brands

- Household groceries
- Snacks, biscuits and chips
- Household cleaning products
- Pet food
- Personal care items
- Cosmetics
- Clothing and shoes
  - Do respondents shop for themselves, their partner or their children
- Alcohol and non-alcoholic beverages
- Do respondents maintain brand loyalty or differ from usual brands due to specials

Fast Food Purchasing Behaviour

- How often do they consume fast food
- What is the purchasing behaviour associated with fast food i.e. delivery, dine-in, order at the counter etc.
- Who is the preferred outlet for fast food consumption

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
### Household Purchase Behaviour

#### Frequency of Purchase

- **42%**
  - Do one bulk shop a month and fill ups

- **8%**
  - Shop twice a month/every 2 weeks

- **5%**
  - Do one bulk shop annually and fill-ups

#### Purchase Responsibility

- **39%** Wholly
- **35%** Partly
- **26%** Not

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
Top Grocery Retailers

Source: MAPS 2020/2021 (Jul '20 – June '21)
Top Liquor Stores

Past 4 weeks

- Top liquor outlets
- Avg. HHI

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Avg. Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>2,03m</td>
<td>34</td>
</tr>
<tr>
<td>1,76m</td>
<td>36</td>
</tr>
<tr>
<td>1,21m</td>
<td>36</td>
</tr>
<tr>
<td>0,47m</td>
<td>36</td>
</tr>
</tbody>
</table>

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
CLOTHING AND SHOES
Clothing Purchases
Past 3 months

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

- Children’s clothing: 21%
- Women’s clothing: 20%
- Men’s clothing: 20%
- None: 52%

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

- Yourself:
  - Only buy branded clothes: 16%
  - Shop around for bargains: 6%
  - Buy clothing online: 21%

- Partner:
  - Only buy branded clothes: 3%
  - Shop around for bargains: 4%
  - Buy clothing online: 1%

- Children:
  - Only buy branded clothes: 13%
  - Shop around for bargains: 5%
  - Buy clothing online: 23%

Source: MAPS 2020/2021 (Jul ’20 – June ’21)

Population 15+: 42,025,645

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
COSMETICS
Cosmetics Purchases

Do you ever purchase cosmetics?

YES 61%

Cosmetics: Top 3 brands purchased past 4 weeks

Supermarket
Health/beauty store (Clicks, Dis-Chem)
Private sales
A specialist cosmetic/perfume store
Clothing store (Edgars, Woolworths)
Flea markets/hawkers
Pharmacy/chemist
Online
Other

Where do you usually buy these cosmetic products?

- Supermarket: 30%
- Health/beauty store (Clicks, Dis-Chem): 17%
- Private sales: 5%
- A specialist cosmetic/perfume store: 4%
- Clothing store (Edgars, Woolworths): 4%
- Flea markets/hawkers: 1%
- Pharmacy/chemist: 1%
- Online: 0%
- Other: 3%

Source: MAPS 2020/2021 (Jul ’20 – June ’21)

Population 15+: 42 025 645
ALCOHOL PENETRATION
Alcohol Penetration

Past 7 days

Product Penetration vs Avg. HHI

Avg. Age

Beer | Natural Table Wine | Ciders
---|---|---
R12 891 | R12 709 | R12 490

Avg.

Age

37 | 37 | 36

Beer | Vodka | Whisky | Liqueur | Gin | Brandy | Flavoured Alcoholic Beverage | Cognac | Non Alcoholic Beer/Cider/Gin
---|---|---|---|---|---|---|---|---
R13 888 | R13 961 | R12 861 | R14 134 | R12 731 | R12 434 | R12 549

Products chosen at random

Source: MAPS 2020/2021 (Jul ’20 – June ’21)

Population 15+: 42 025 645

MAPS PRESENTATION | OCTOBER 2021
### Top Malls Visited

**Top Malls Per Province in the Past 4 Weeks**

#### Gauteng
1. Maponya Mall
2. Menlyn Park
3. East Rand Mall

#### KwaZulu-Natal
1. Gateway
2. The Pavilion
3. Bridge City Shopping Centre

#### Western Cape
1. Canal Walk
2. Liberty Promenade
3. Blue Route Mall

#### Mpumalanga
1. Riverside Mall
2. Tonga Mall

#### Eastern Cape
1. Nonesi Mall
2. Greenacres Shopping Centre
3. Hemingways

#### Free State
1. Mimosa Mall
2. Loch Logan Waterfront

#### Limpopo
1. Thavhani Mall
2. Mall of the North

#### North West
1. Waterfall Mall
2. Mega City Centre

#### Northern Cape
1. Diamond Pavillion Shopping Centre

*Source: MAPS 2020/2021 (Jul ’20 – June ’21)*
Top Malls Visited

Top Malls Visited in the Past 4 Weeks from Selected Provinces

- **KZN: Gateway**
  - Avg. HHI: R15 266
  - Avg. Age: 32

- **WC: Canal Walk**
  - Avg. HHI: R13 662
  - Avg. Age: 40

- **GP: Maponya**
  - Avg. HHI: R22 693
  - Avg. Age: 36

Source: MAPS 2020/2021 (Jul '20 – June '21)
FAST FOOD
**Behaviour: Fast Food**

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

- At least once a month: 34%

**Fast food outlet purchased from: Past 4 weeks**

- KFC: 25%
- Chicken Licken: 10%
- Debonairs: 7%

- Avg. Age: 36 (KFC), 35 (Chicken Licken), 33 (Debonairs)

**How do you purchase take-aways?**

- Order from the counter and leave: 45%
- Order from the counter and dine in: 20%
- Use the drive-thru facility: 7%
- Use the delivery service: 4%
- Telephone ordering and drive to collect: 2%
- Use an app or website to order: 2%

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
BRAND LOYALTY
Brand Loyalty

Do you always buy the same brands?

- Groceries: 40%
- Toiletries: 39%
- *Cosmetics: 41%

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

- Groceries: 47%
- Toiletries: 36%
- *Cosmetics: 29%

If your brand is not on the shelf, would you buy another brand because it costs less than the brand you usually buy?

- Groceries: 49%
- Toiletries: 36%
- *Cosmetics: 34%

*Analysis based on rebased numbers

Source: MAPS 2020/2021 (Jul ’20 – June ’21)
THANK YOU!
TECHNICAL ASPECTS
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
Research Universe & Methodology

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

Target:
- 20 004 face-to-face interviews & 10 002 diaries
- 20 049 face-to-face interviews & 10 672 diaries

Achieved sample:
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.
Substitution Process

Identification of replacement points

- In every enumeration area (EA) to be visited, 8 primary and 4 substitution points are preidentified [along with the exact GPS coordinates for each point] through a random sampling process
- 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
• 20,049 respondents completed a face-to-face questionnaire. Half were expected to complete the leave behind questionnaire.
• 10,672 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.
Field Quality Controls

Teach respondents how to fill in the diary

Check each diary is filled in fully

Quality check high risk areas

Diaries are sent to the Plus 94 head office and checked again for completeness

Diaries are submitted for verification and backchecking

Data is captured

Diaries are reviewed by Data Processing

Captured data undergoes final quality checks on data integrity

Source: MAPS 2020/2021 (Jul ‘20 – June ’21)
Demographic Profile

Area Distribution
- Rural: 25%
- Urban: 29%
- Metro: 46%

Households
- Total: 17.16m
- People per household: 3.5

Provincial Distribution
- North West: 9%
- Gauteng: 28%
- Mpumalanga: 8%
- Limpopo: 7%
- KwaZulu-Natal: 18%
- Eastern Cape: 10%
- Western Cape: 12%
- Northern Cape: 2%
- Free State: 5%
- North West: 2%
- Gauteng: 46%

Metropolitan Area Distribution
- Metro: 46%
- Urban: 29%
- Rural: 25%

Gender Distribution
- Male: 49%
- Female: 51%

Source: MAPS 2020/2021 (Jul '20 – June '21)
**Demographic Profile**

**Race**
- Black: 78%
- White: 10%
- Coloured: 9%
- Indian/Asian: 2%

**Most Spoken Language**
- IsiZulu: 24%
- English: 19%
- IsiXhosa: 13%
- Afrikaans: 9%
- North Sotho/Pedi: 8%
- South Sotho: 8%
- Setswana: 7%
- XiTsonga: 4%
- SiSwati: 3%
- Tshivenda: 3%
- IsiNdebele: 1%
- Other: 1%

Source: MAPS 2020/2021 (Jul ‘20 – June ’21)
THANK YOU