

#MAPS2021

# MAPS

## Waves 2 & 3

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JANUARY 2021– DECEMBER 2021



MARKETING RESEARCH  
FOUNDATION

**PLUS 94**  
**RESEARCH**

# TOPICAL MEDIA TRENDS


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**2021**




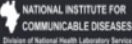
# Covid-19 Vaccine Rollout

**Latest post**  
Information about COVID-19 from government, civic, health and other Pages.




**National Institute for Communicable Diseases** ✓  
4h · 🌐






[#WinterIsHere](#) During the flu season, the capacity in hospitals increase up to 90% in terms of bed occupancy. However, if more people rolled up their sleeves to get the flu shot, the pressure on health systems would be greatly reduced. The onus is on you! [#StaySafe](#)



**DURING THE FLU SEASON, THE CAPACITY IN HOSPITALS INCREASE UP TO 90% IN TERMS OF BED OCCUPANCY**



If more people rolled up their sleeves to get the flu shot, the pressure on health systems would be greatly reduced. The onus is on you! [#StaySafe](#)




👍😂 79

👍 Like      ➦ Share


7 Shares

**Leading health organizations**




**National Institute for Communicable Diseases** ✓  
Government organization

Follow Visit website



**National Department of Health (South Africa)** ✓  
Government Building

Follow Visit website



**Doctors Without Borders (MSF)** ✓  
Nonprofit organization

Follow Visit website

See more ▾

On 17 February 2021 the state president finally announced the rollout of the covid vaccine. Several pro-vax and antivax segments emerged. The issue of mandatory vaccines still unresolved.

# Arrest of Former President

← → ↺ twitter.com/PjMokoena31/status/1530359941218828290



Home



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Messages



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Lists



Profile



More



Tweet



Jnr Mokoena

@PjMokoena31

Replying to @kgaphola\_A10 and @Gentlements

Baphi this sellouts vele?



This event was polarizing and tested the justice systems. It is seen by many as a precursor to the subsequent July riots.



# July Riots



Home



Explore



Notifications



Messages



Bookmarks



Lists



Profile



More

Tweet



Tweet



Daily Maverick ✓  
@dailymaverick



RETAIL: Shoprite bounces back from devastation of July looting



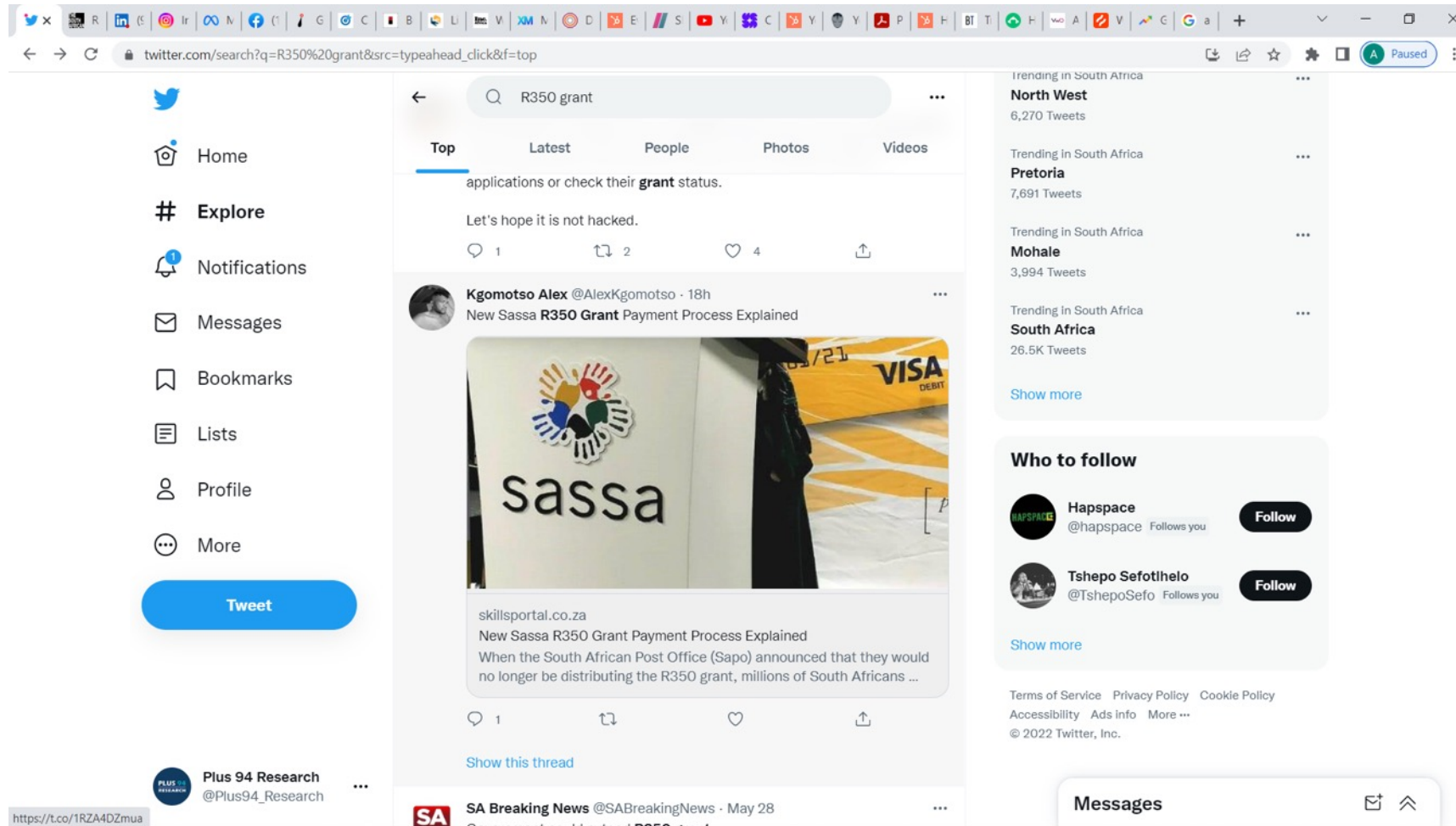
dailymaverick.co.za

RETAIL: Shoprite bounces back from devastation of July looting

Shoprite bounces back from devastation of July looting By Sasha Planting

In what appeared to be political unrest linked to the arrest of former president Jacob Zuma, riots broke out in KZN and Gauteng. Over 300 people were killed during the looting as well as leaving thousands jobless. The cost was estimated at over R35 billion.

# Government Relief Grant



After a long wait, the payout of the R350 unemployment relief grant was finally approved by government early August to help aid unemployed citizens that were affected by the covid-19 pandemic.

# Easing of Lockdown Restrictions

## SA moves to Adjusted Alert Level 1

Thursday, September 30, 2021



Following meetings of the National Coronavirus Command Council and the President's Council of Ministers, the President has decided to move South Africa from Adjusted Alert Level 2 to Adjusted Alert Level 1 for the next three months.

This was announced by President Cyril Ramaphosa during an address to the nation on Thursday.

The President said that a few days ago, the South African COVID-19 Modelling Consortium has emerged from a third wave of COVID-19 infections.

"In the last seven days, the average number of new cases was at around 1 800 a day. There have been significant decreases in COVID-19 hospitalisations and deaths in all provinces. This is news that is very encouraging,"

Ramaphosa said.

The President said the current trends in the progression of the pandemic mean that a number of the restrictions in place can be eased in line with the recommendations of the Ministerial Advisory Committee on COVID-19.

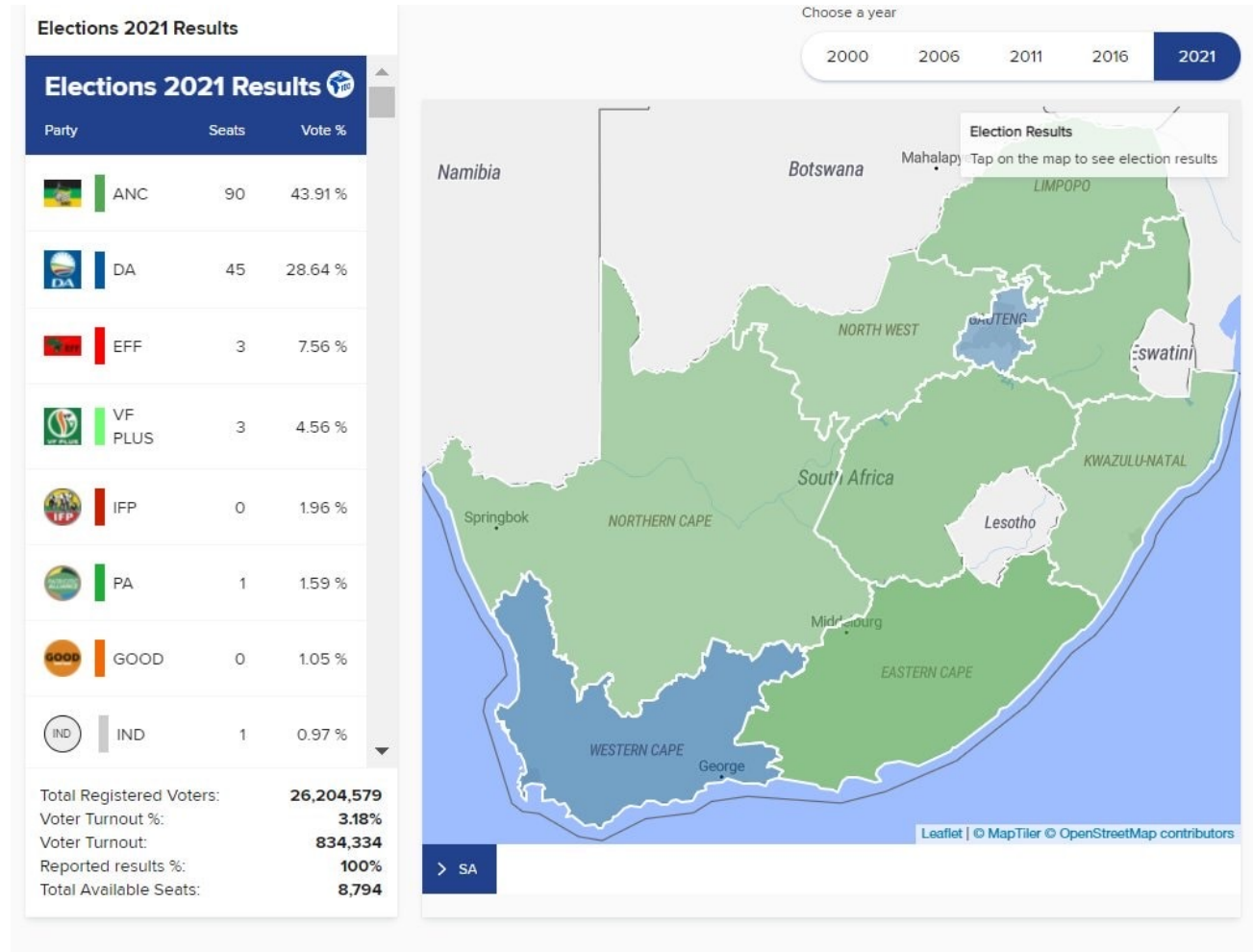
The following measures will apply as part of adjusted Alert Level 1:

- The hours of the curfew will change, from 12 midnight to 4 am.
- Non-essential establishments like restaurants, bars and fitness centres will need to close by 11 pm to allow their employees to leave before the start of the curfew.
- The maximum number of people permitted to gather indoors will increase from 250 to 750, and the maximum number of people permitted to gather outdoors will increase from 500 to 2 000.
- Where the venue is too small to accommodate these numbers with appropriate social distancing, then no more than 50% of the capacity may be used. This includes religious services, political events and social gatherings, as well as restaurants, bars, taverns and similar.
- The maximum number of people permitted at a funeral will increase from 50 to 100. As before, night vigils, after-funeral gatherings and other public gatherings are not allowed.
- The sale of alcohol – for both off-site and on-site consumption – will be permitted, according to normal licence provisions. However, the sale of alcohol after 11 pm will not be permitted.
- The wearing of masks in public places is still mandatory, and failure to wear a mask when required remains a criminal offence.

Voorna Vaccination Weekend

Lockdown restrictions brought so much frustrations to many business owners and fellow citizens. Level 1 allowed for more movement and flexibility at social gatherings.

# Municipal Elections 2021



The Independent Electoral Commission held elections in early November. The ruling party declined further on 2016 elections and the 2019 elections.



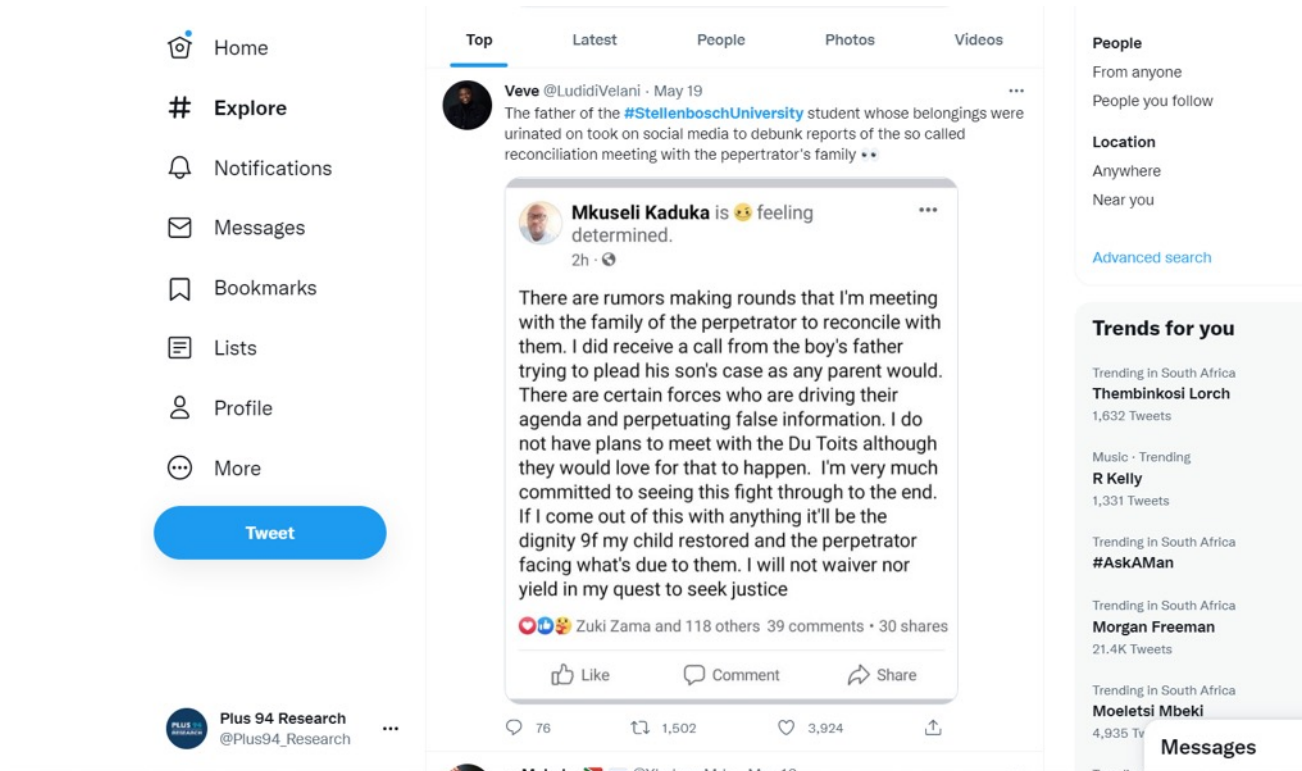
# TOPICAL MEDIA TRENDS

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2022

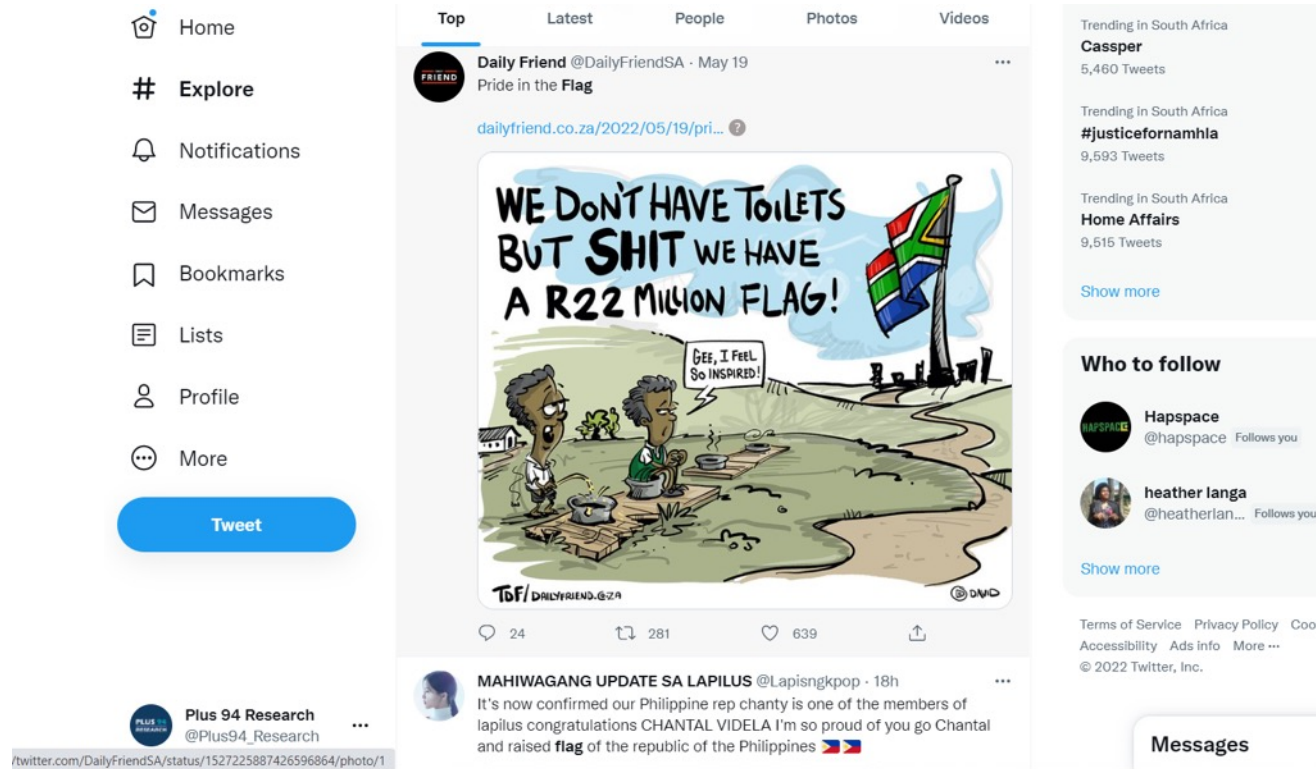






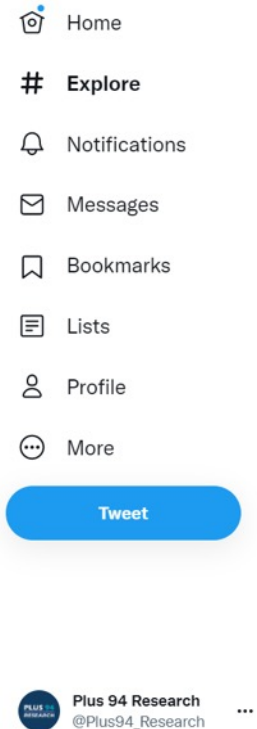
Heightened racial tensions and was typified by disgust and emotionally charged responses.

# New Flag

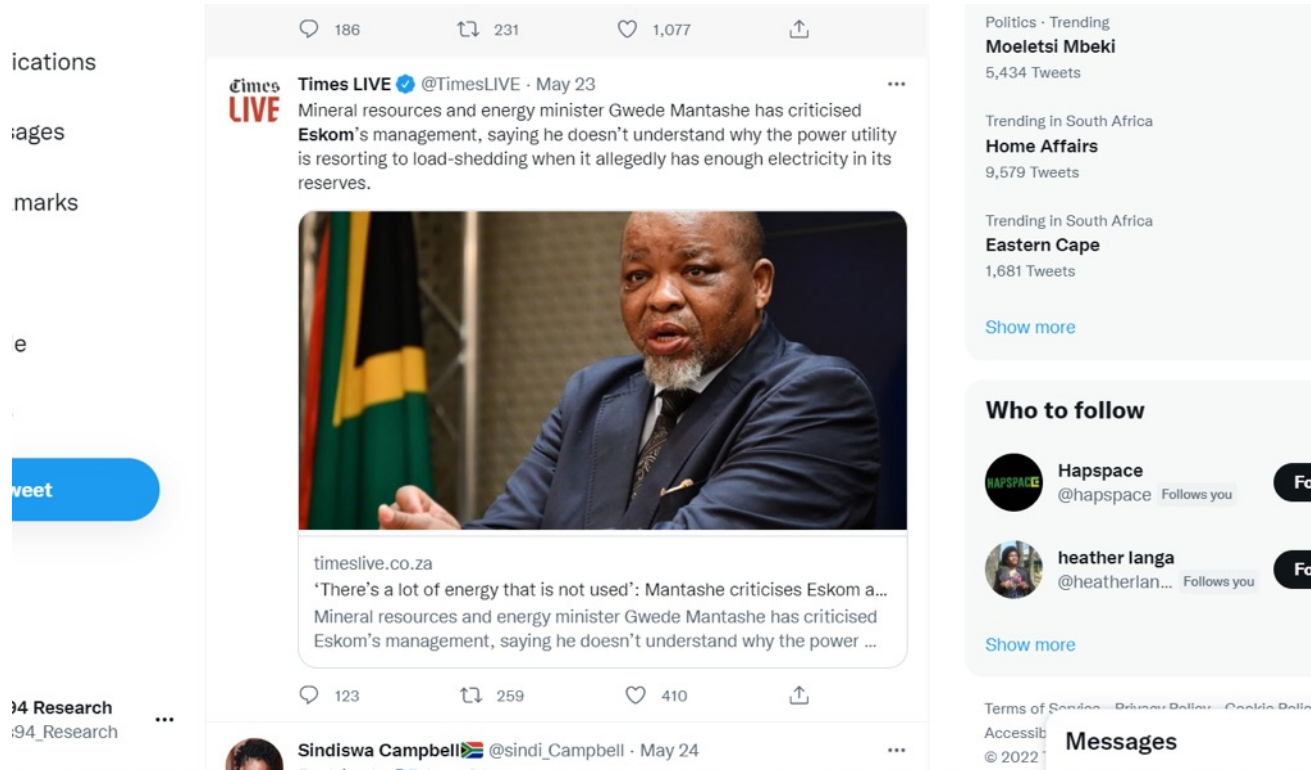


A grand project costing R22 million seen as senseless in the face of rising prices, poverty, effects of the pandemic and corruption among the political elites.

# Operation Dudula



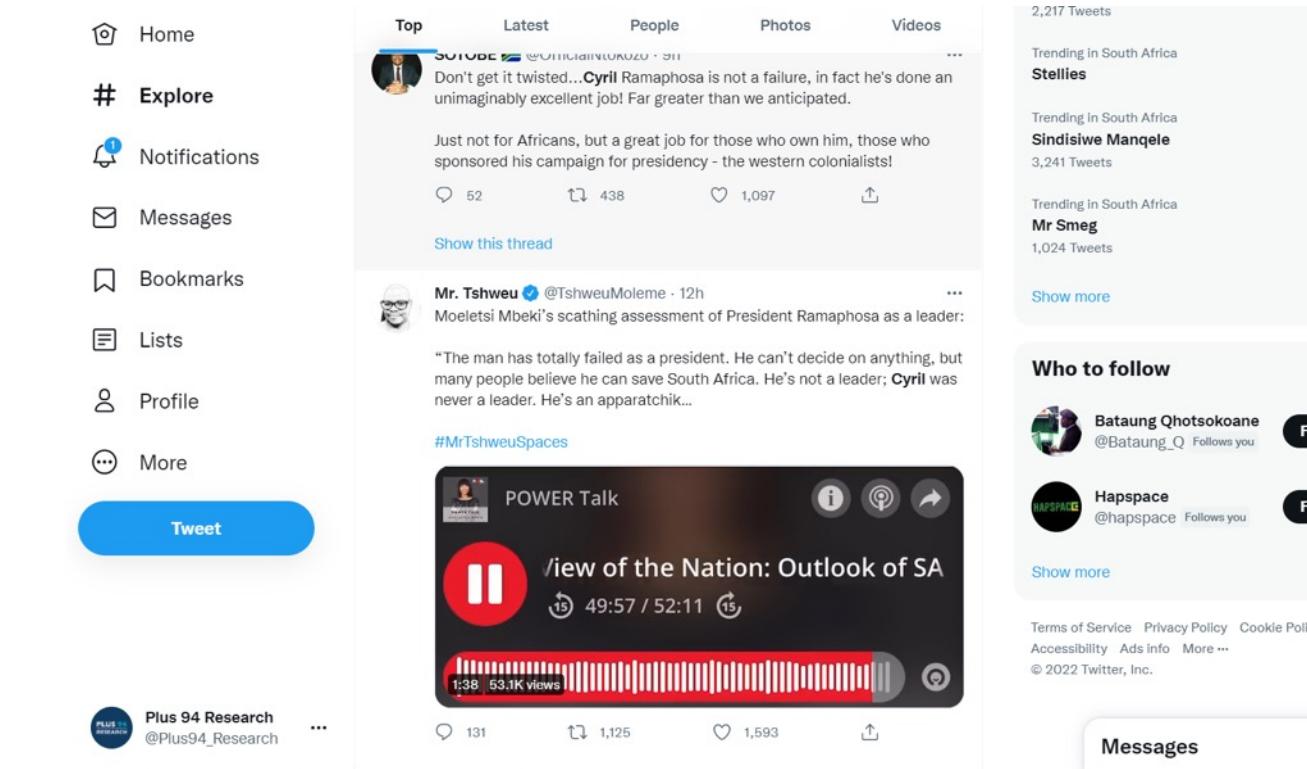
Conflict around illegal immigrants and possibility of selective racially biased xenophobia.



Eskom affecting the daily lives of South Africans, seemingly unable to cope with the power demands of the country. Tensions at board and ministerial levels.



# Cyril Ramaphosa



Caught in the middle of faction fights, elimination of corruption, retaining control of the ANC and remaining in touch with the needs of the people as president on issues such as covid 19, Russia, floods in KZN etc.



# Gender Based Violence

Messages

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Lists

Profile

More

**Tweet**

**Xhosa is** 🇿🇦🔥 @TakaTina1 · May 20

Her name is Singwa Namhla Mtwla, she was shot and killed with 9 bullets on a driveway at Sdwadwa in Umtata South Africa.

It was alleged that she was trying to leave an abusive relationship with the pictured Mfesane Bhekezulu.

[#GBV](#) [#StopGBV](#)



226 2,454 2,783

[Show this thread](#)

Trending in South Africa

**Julius Malema**

8,124 Tweets

[Show more](#)

**Who to follow**

**HapSpace** @happyspace

**Jam** @Jam

[Show more](#)

Terms of Service  
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SA Society continues to be plagued by high and intolerable levels of GBV, including significant levels of femicide.

#MAPS2021

MAPS DATA OVERVIEW:

# Waves 2 & 3

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JANUARY 2021– DECEMBER 2021



MARKETING RESEARCH  
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**PLUS 94**  
**RESEARCH**

# Research Universe & Methodology

## Universe:

Age:  
Gender:  
Race:  
Area:

**15 years and older**  
**Males and females**  
**All racial groups**  
**National, all 9 provinces**

Target:

**20 004 face-to-face interviews & 10 002 diaries**

Achieved sample:

**20 052 face-to-face interviews & 11 136 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 55 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.

# 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



# HEALTH CHECK

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# 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.

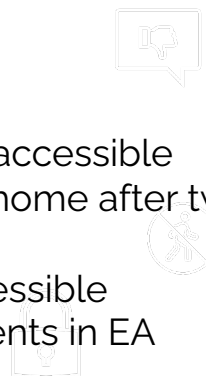
Upfront use of GIS mapping for validation and verification greatly reduces the need for substitution.

## Household Substitutions

Overall  
substitution  
rate: **9%**

### Substitutions required due to:

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



The breakdown of the substitution is as follows:

- 260 respondent refusals
  - 81 houses inaccessible
  - 160 cases of nobody home after two call-backs
  - 66 other
  - 164 Inaccessible EAs [equates to 1312 households]
- Overall Substitution Rate =  $[(260+81+160+66+164)/20049] \times 100\% = \mathbf{9\%}$

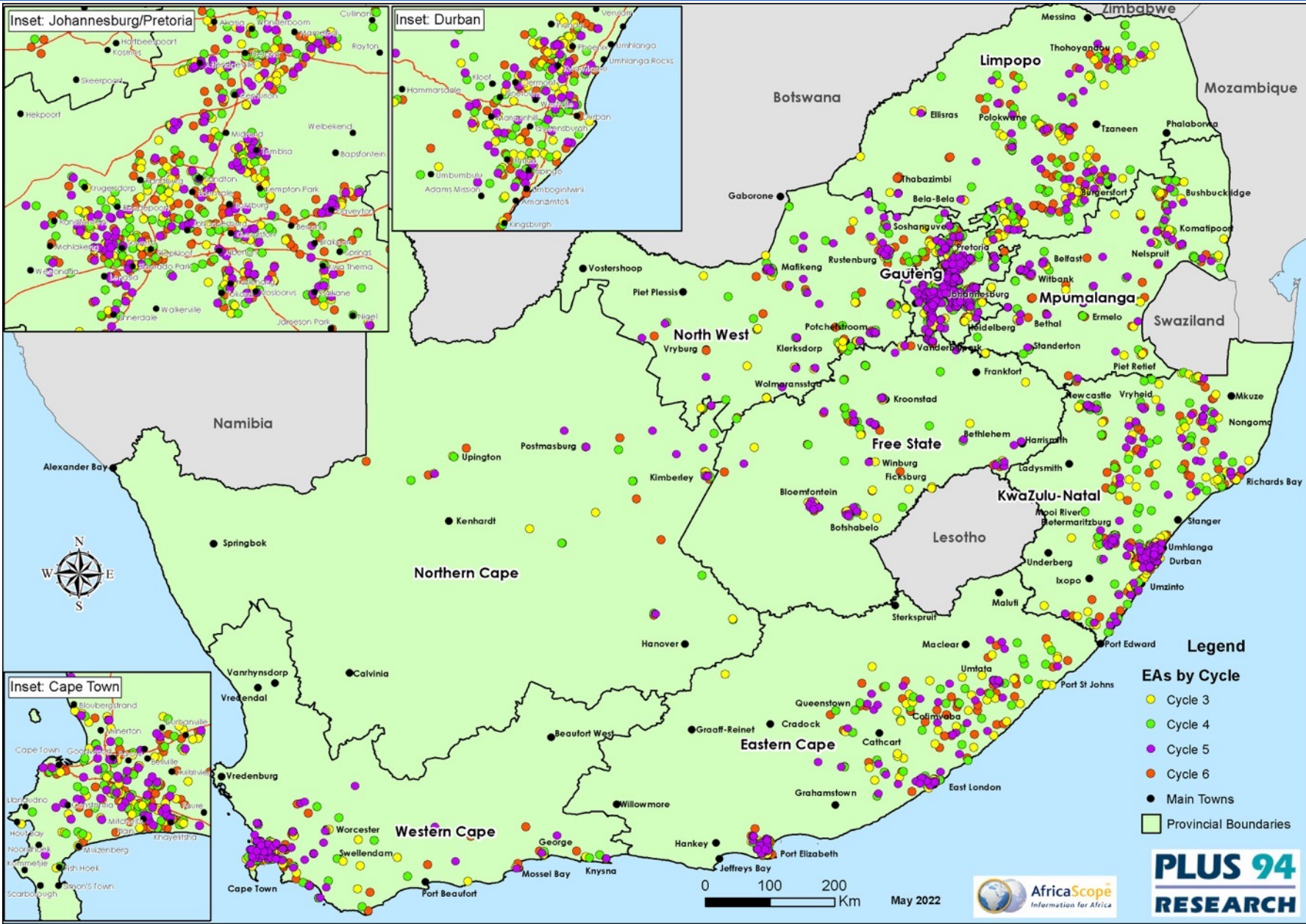
## Back Checks

**23%**  
MAPS

**15%**  
Industry



# Areas Covered



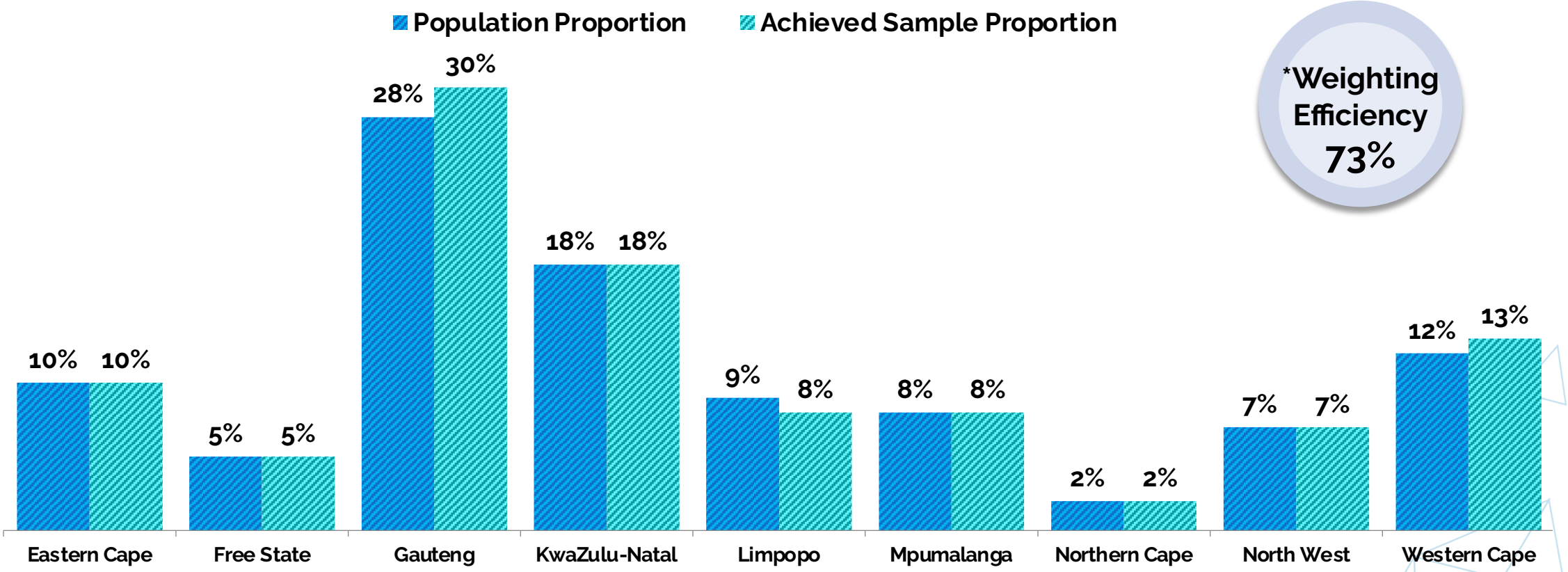
# SAMPLE REPRESENTATIVENESS

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# Population vs Achieved Weighted Proportions



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.

\* Overall individual weighting efficiency for the Jan '21 – Dec '21 fieldwork period



# Weighting Efficiency: Individual Weights



Province	Jan '21 – Dec '21
Eastern Cape	78%
Free State	73%
Gauteng	79%
KwaZulu-Natal	67%
Limpopo	70%
Mpumalanga	71%
North West	65%
Northern Cape	73%
Western Cape	73%
Overall [National]	73%

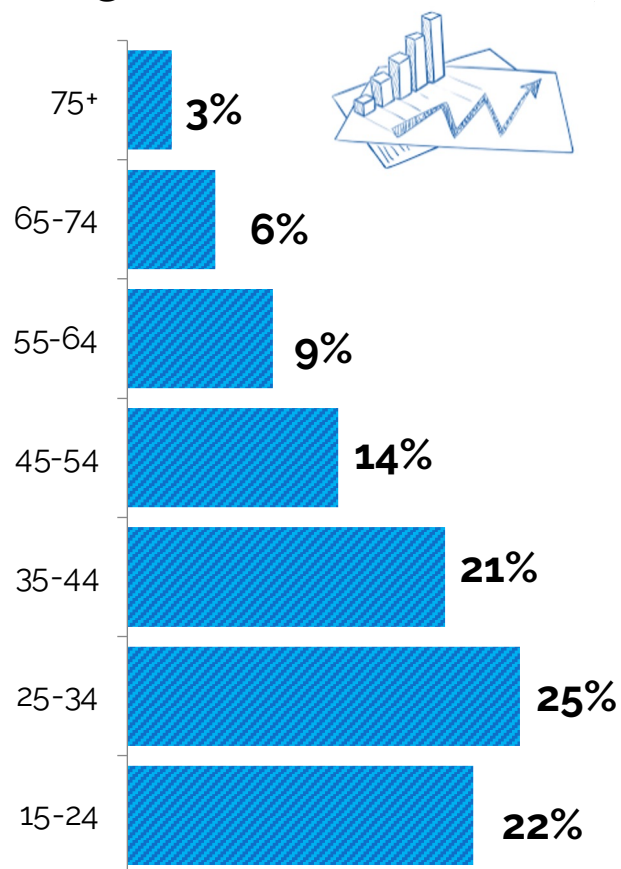
# Weighting Efficiency: Household Weights



Province	Jan '21 – Dec '21
Eastern Cape	86%
Free State	86%
Gauteng	75%
KwaZulu-Natal	61%
Limpopo	84%
Mpumalanga	73%
North West	79%
Northern Cape	88%
Western Cape	78%
Overall [National]	75%

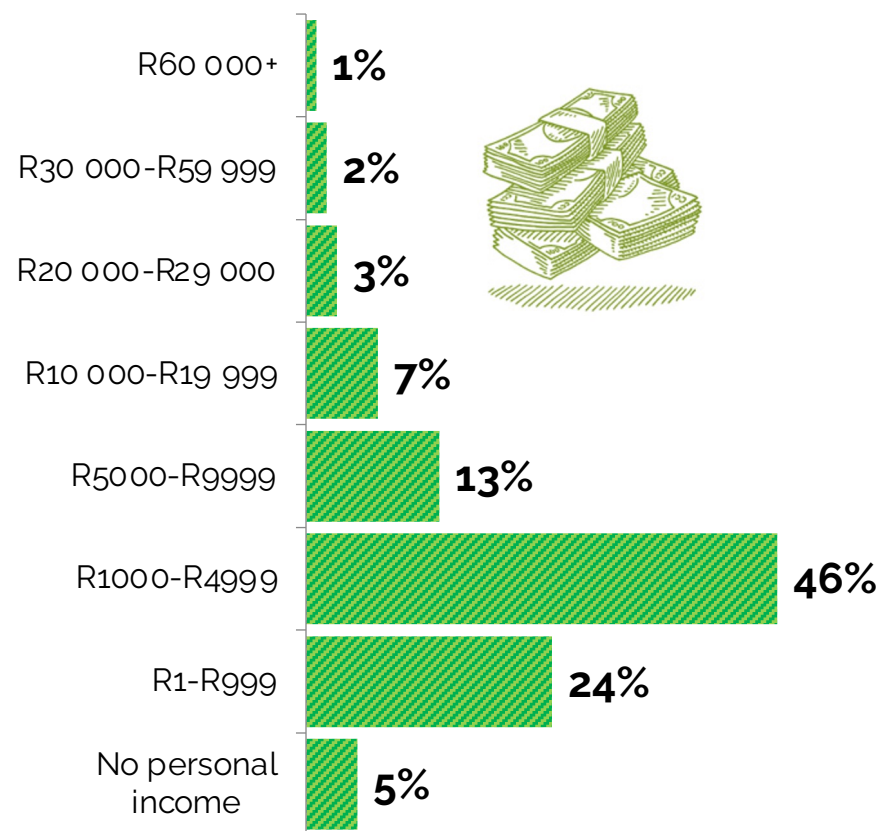
# Demographic Profile

## Age



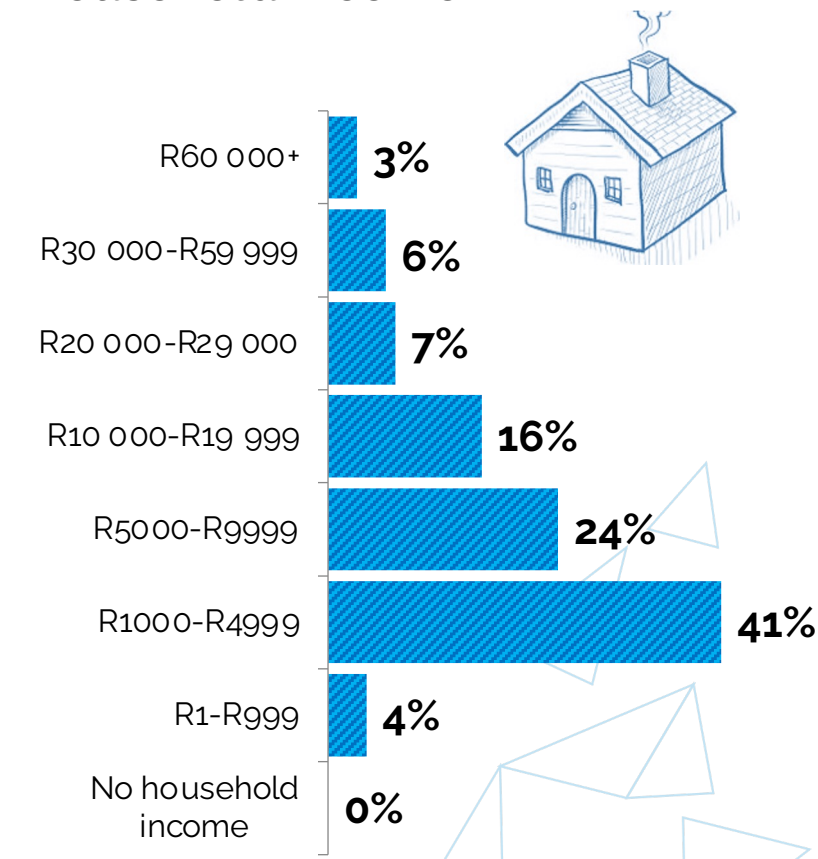
Average age of respondents is **38**

## Personal Income



Average personal income: **R4 882**

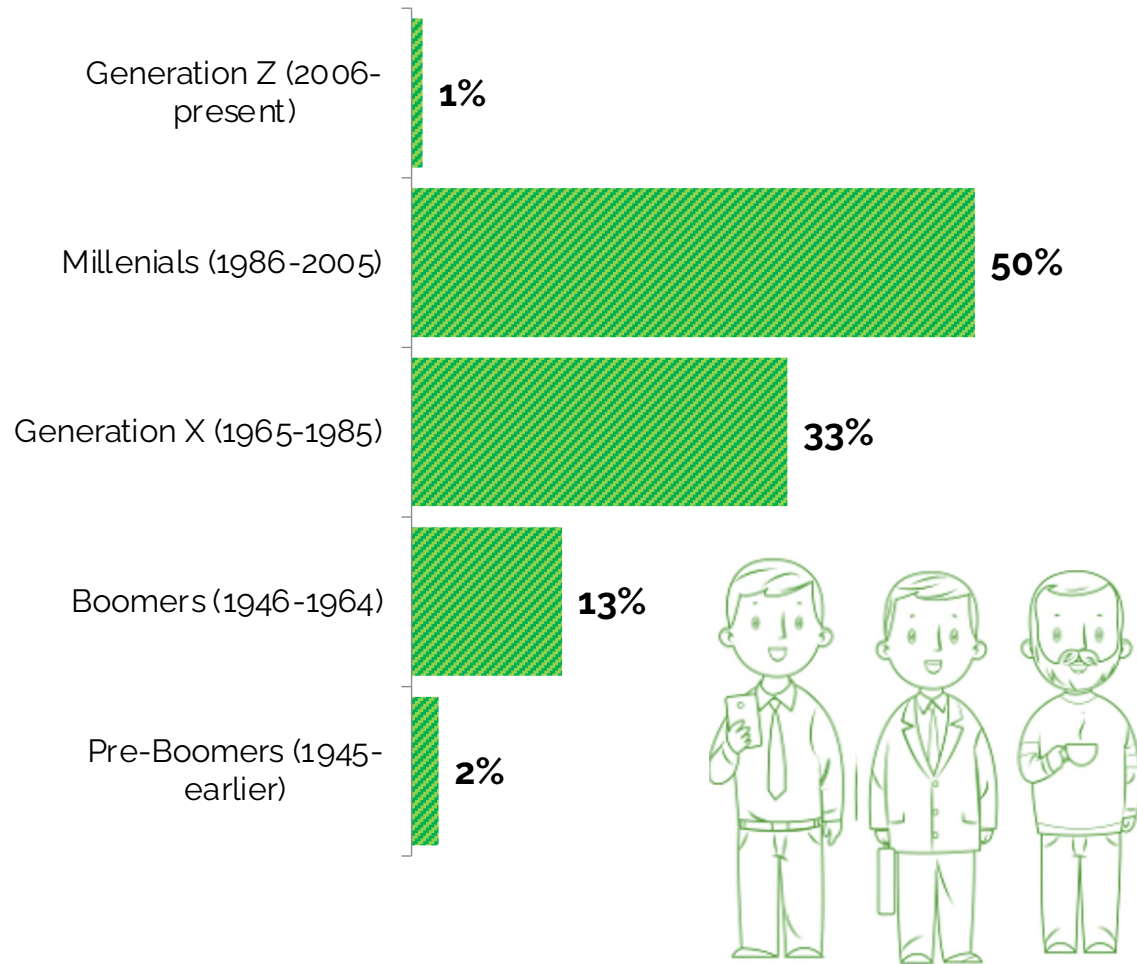
## Household Income



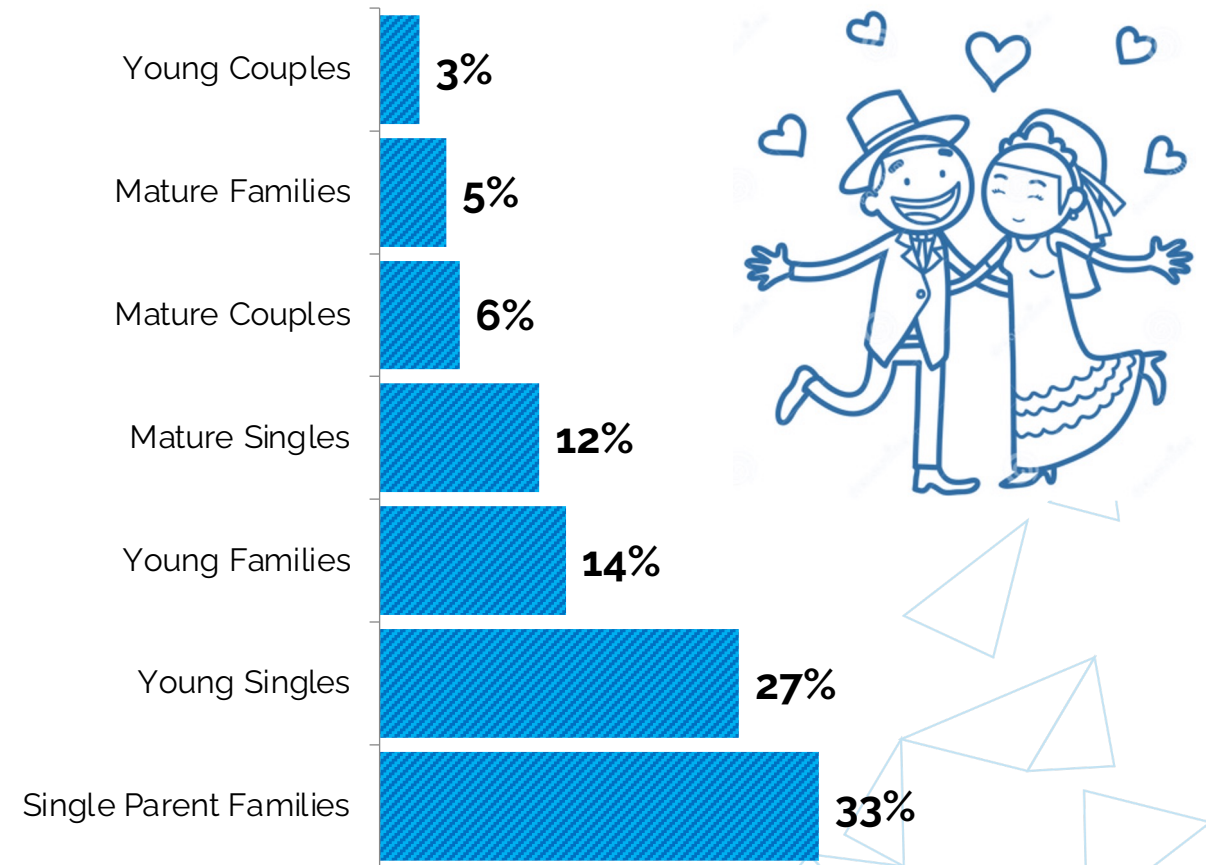
Average household income: **R11 648**

# Demographic Profile

## Generations



## Life Stages

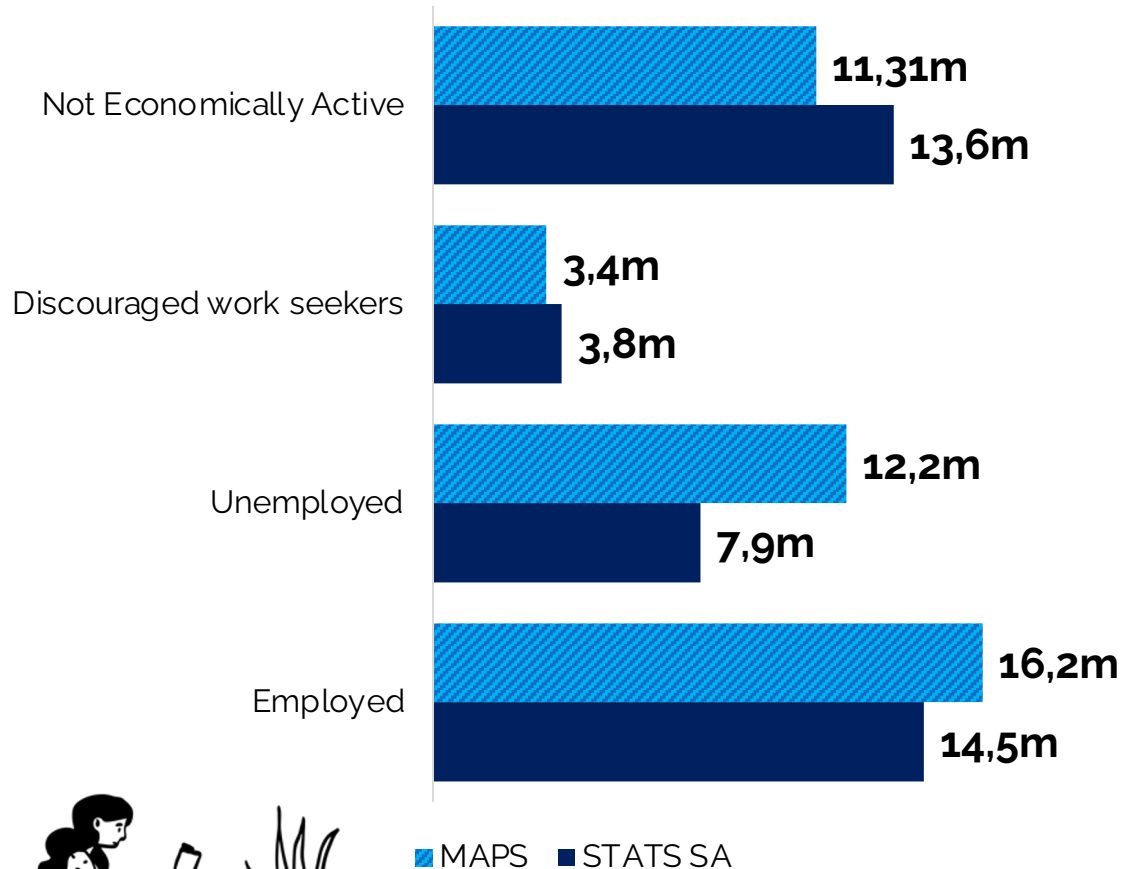


Note: Percentages may not add up to 100% due to rounding off

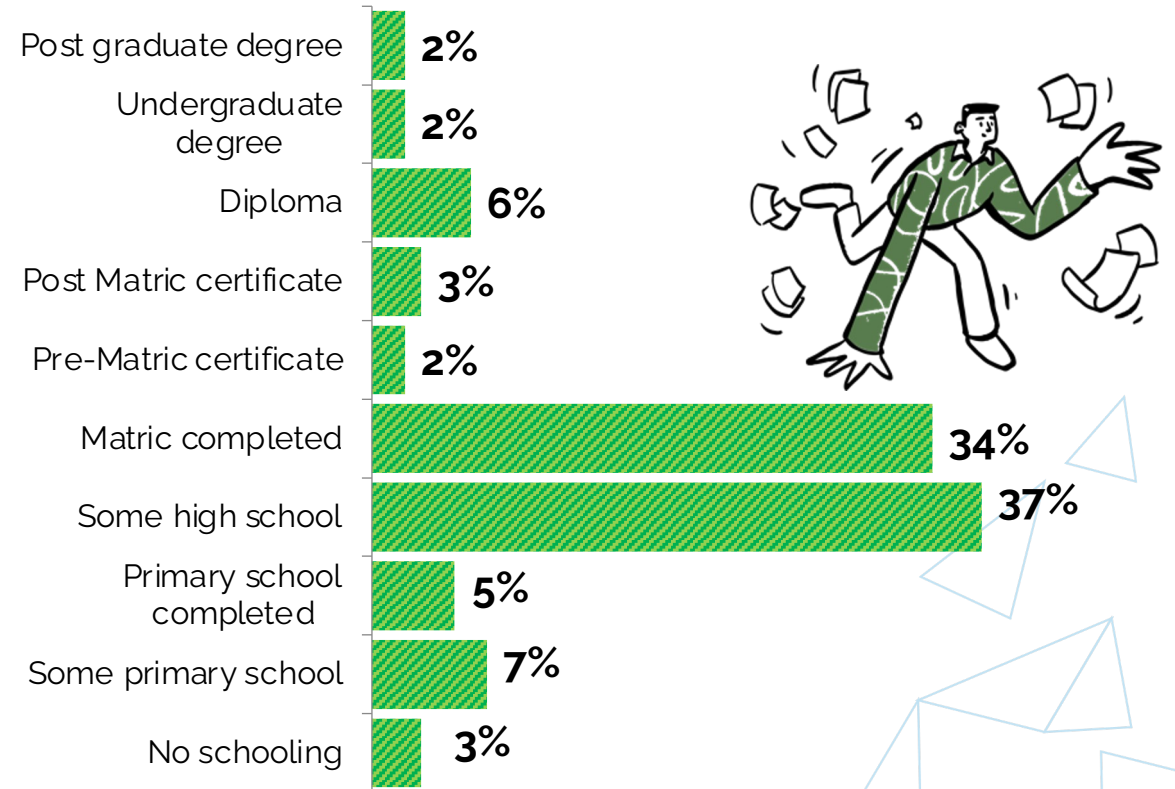


# Demographic Profile

## Employment Status: \*MAPS vs. STATS SA



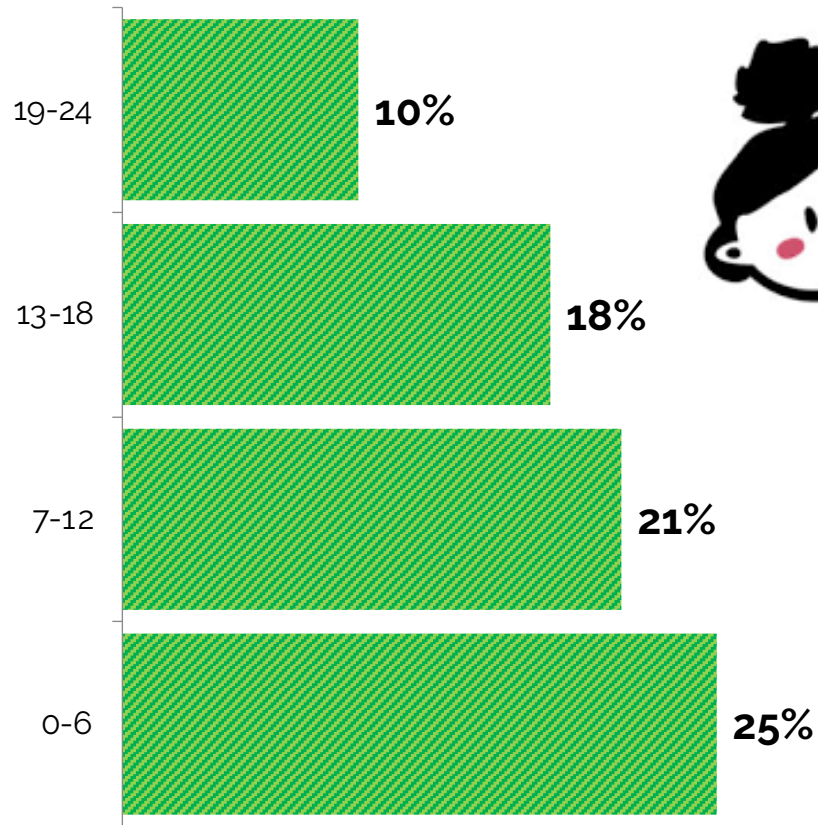
## Highest Level of Education Achieved



\*Comparing MAPS Cycle 6 vs Q4 2021 STATS SA figures

# Demographic Profile

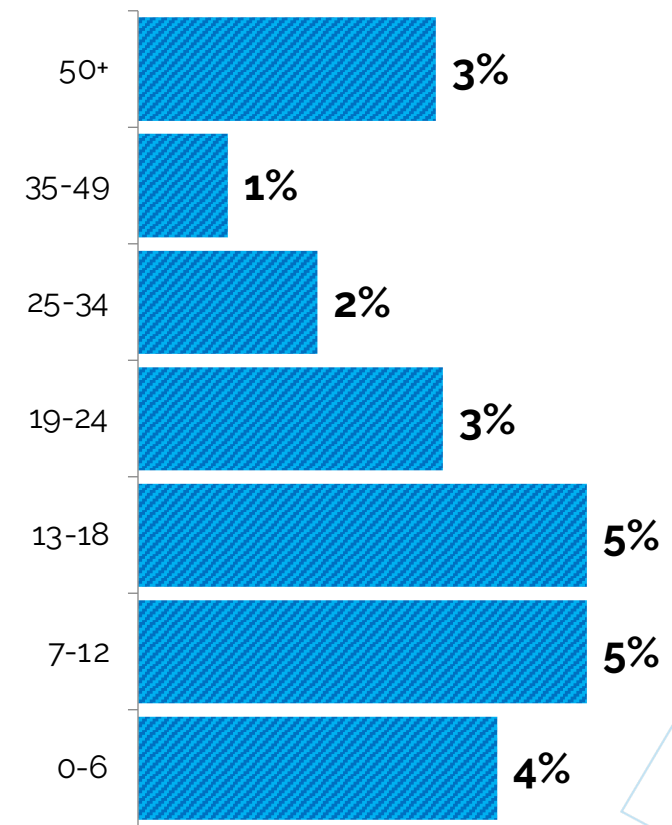
Age: Dependents (own children)



**47%** of respondents have dependents who are their own children.

In total, about have **53%** of all respondents have dependents.

Age: Other dependents (not own children)



**16%** of respondents have dependents who are **not** their own children.

# SEGMENTATION

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# Segmentation

## LSM Segmentation

- Living Standards Measure 1 levels 1 - 10

## SEM Segmentation

- Socio-Economic Measure levels 1 - 10
- Super Groups
- Subgroups

## Self Perceptions

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

## Demographics

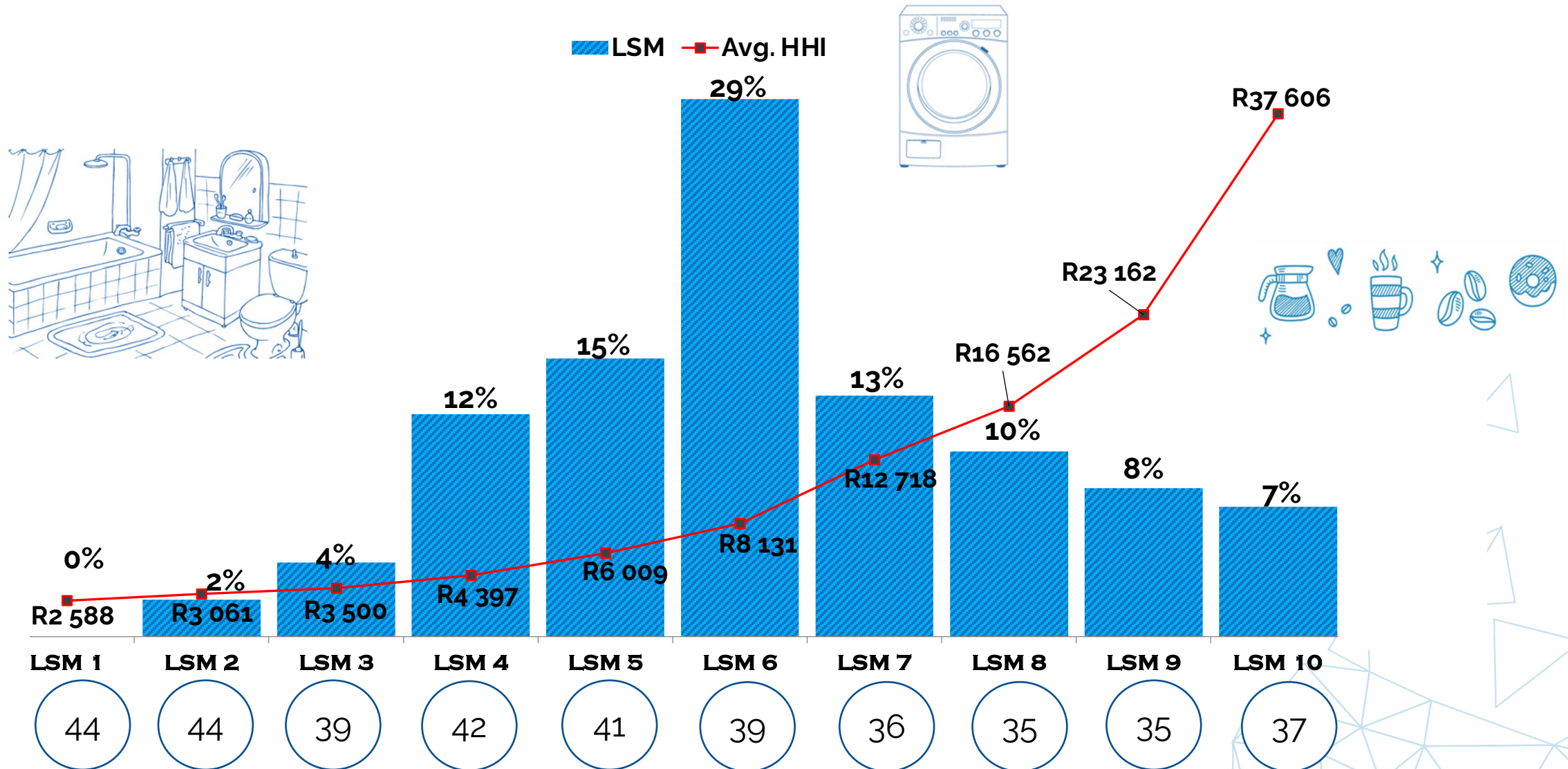
- Average number of households in South Africa
- Average age of respondents
- Racial profiles of respondents
- Gender profiles of respondents
- Most spoken languages
- Marital status of respondents
- Highest level of education
- Dependents living in the household – own children
- Dependents living in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

## Income

- Personal income
- Household income
- Employment status

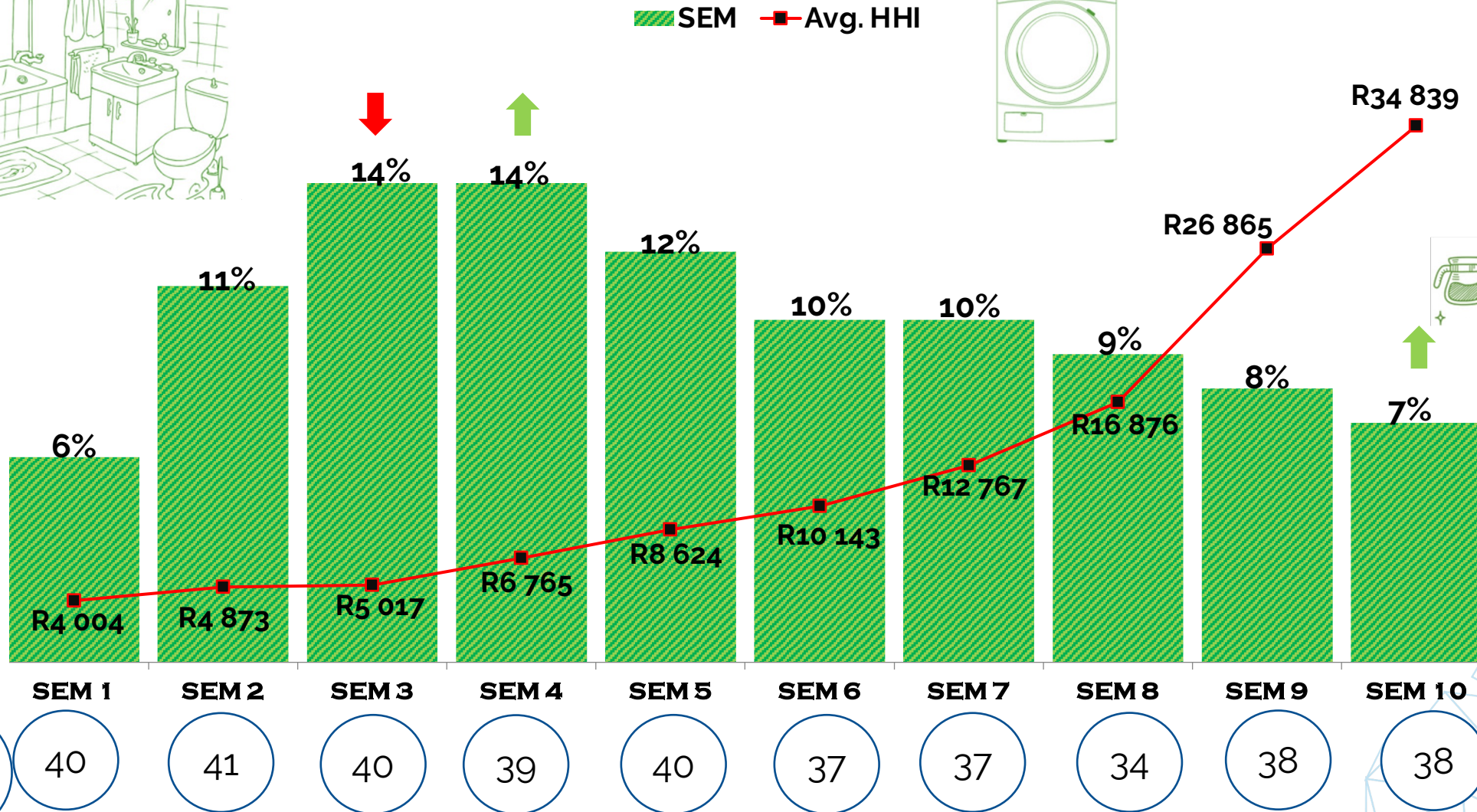
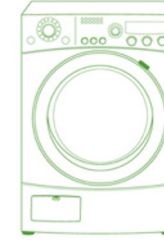


# Living Standards Measure (LSM)



Avg.  
Age

# Socio-Economic Measure (SEM)



Avg. Age

40

41

40

39

40

37

37

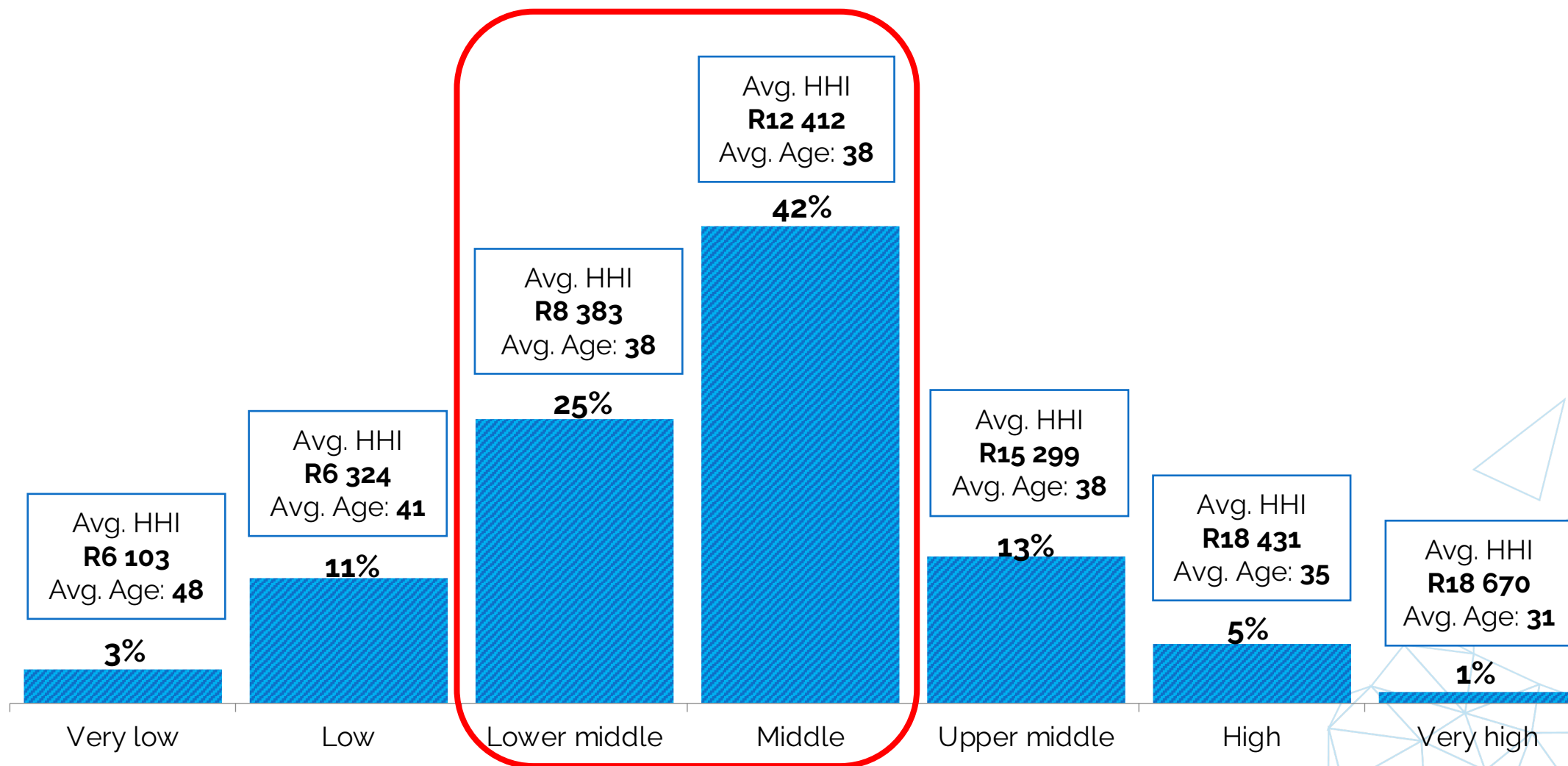
34

38

38

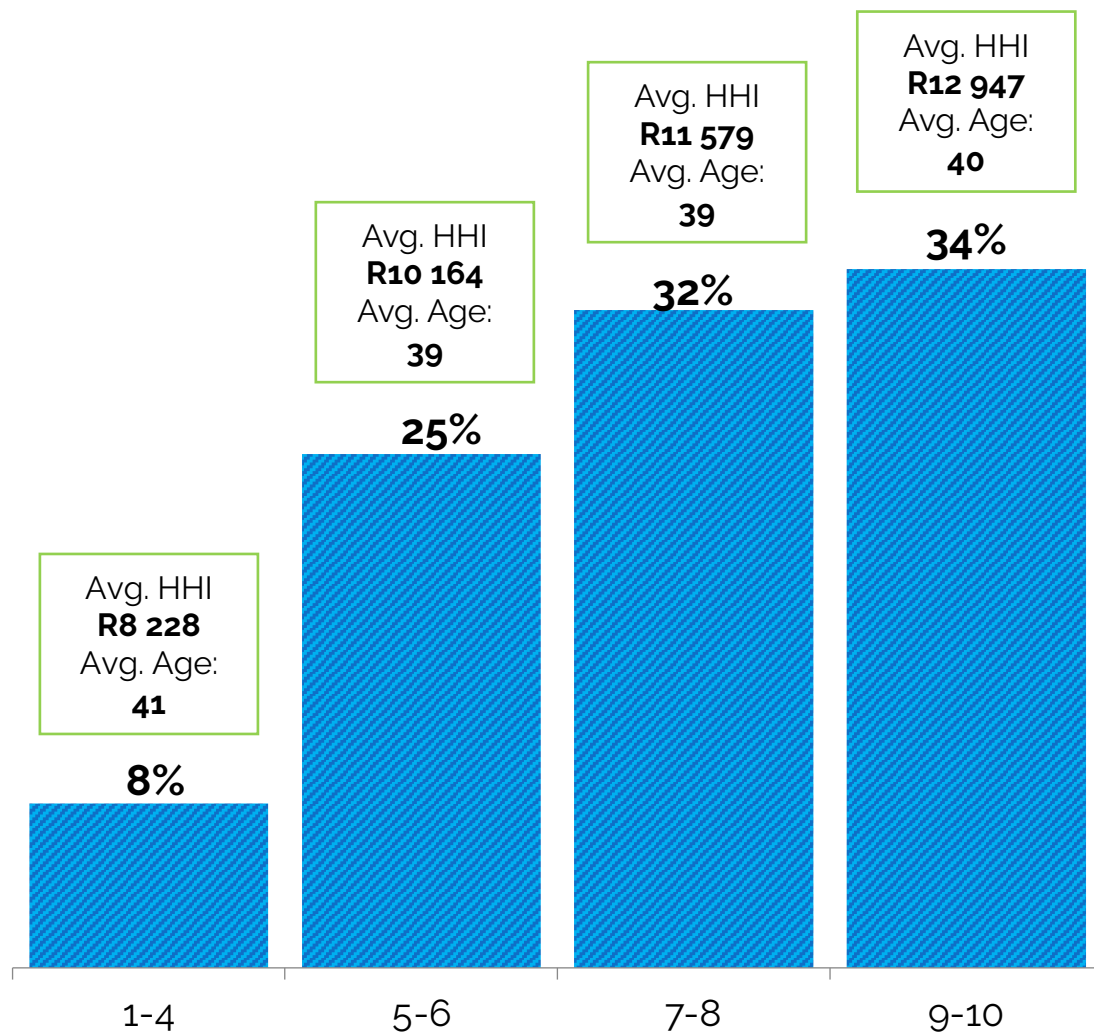
# Self Perception of the Consumer

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

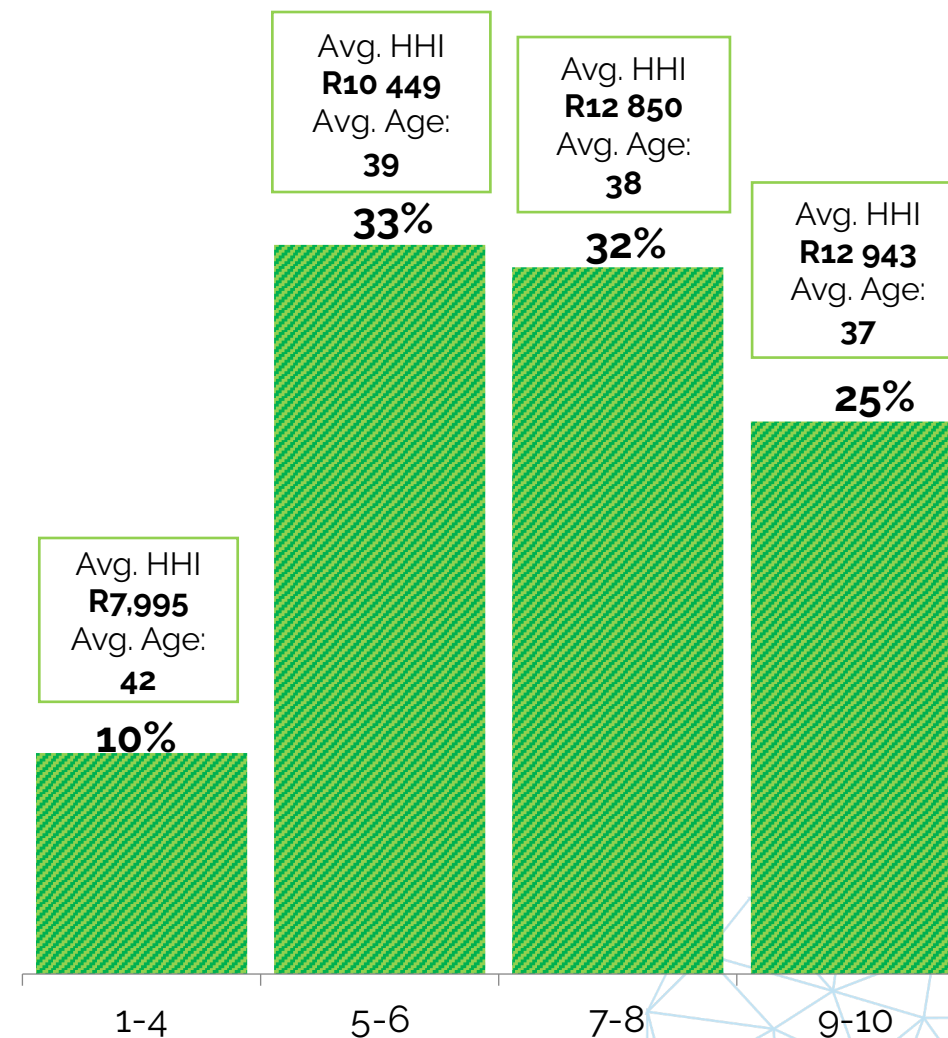


# Self Perception of the Consumer

## Self score: Parenting skills



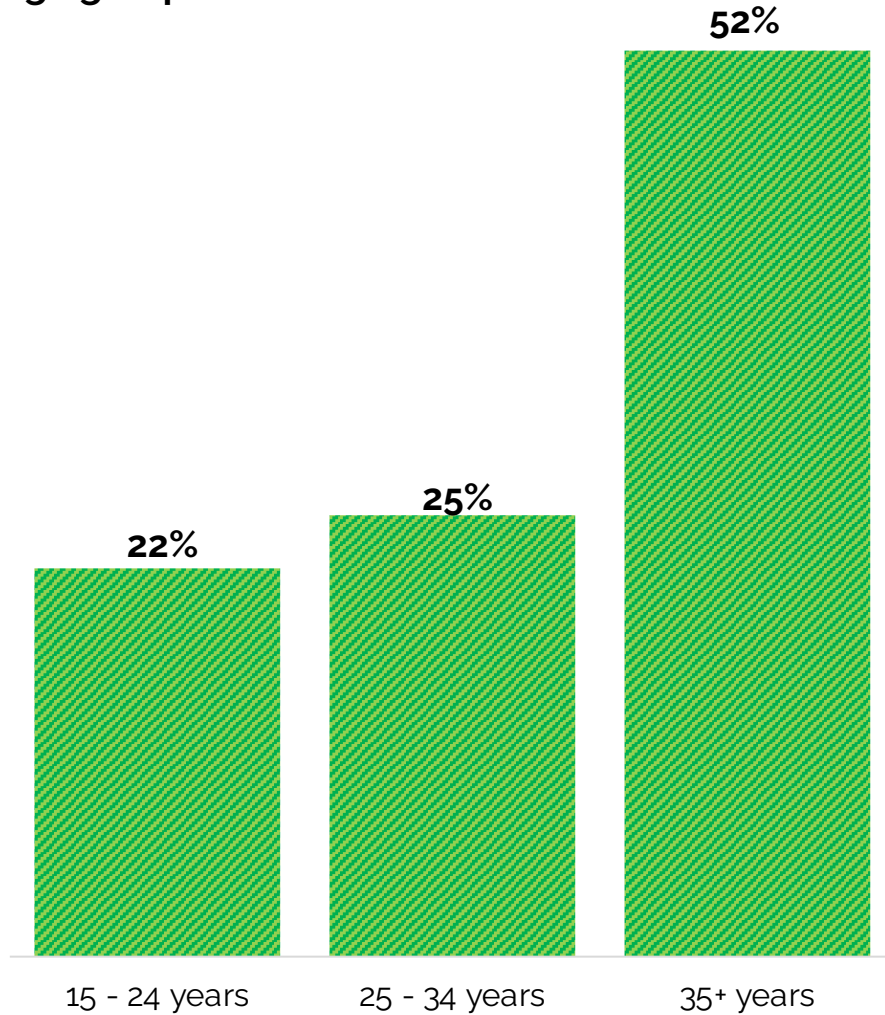
## Self score: Health status



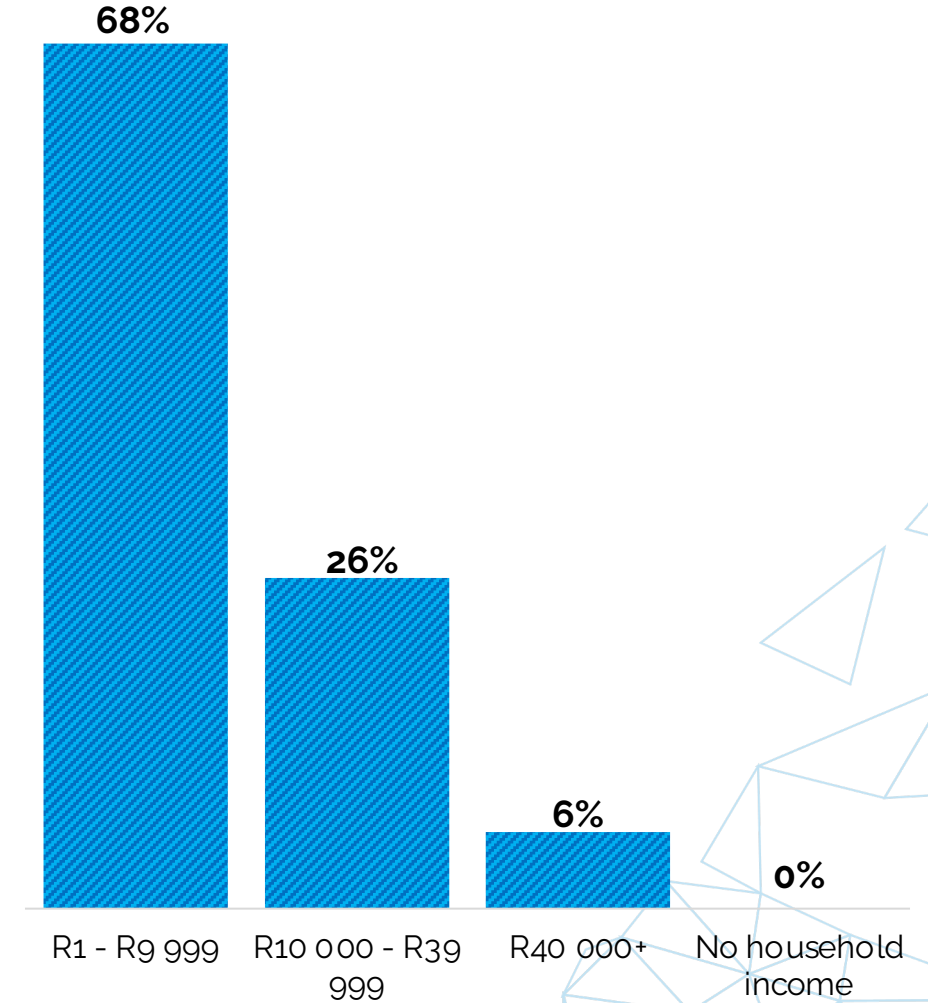


# Age and Household Income Bands

Age group



Household income



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

# MEDIA

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## 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 Behavior
- Streaming Services

## Online

- Social Media
- Online Content
- Streaming

## Out of Home

- Time Spent Travelling on Average Day
- Places of Travel
- Method of Transport Used
- Outdoor Advertising Signs
- Shopping Malls Visited

# Media Population Penetration



**Newspapers**  
Past 3 Months **39%**



**Newspaper Inserts**  
Past 3 Months **15%**



**Magazines**  
Past 3 Months **11%**



**Store Magazines**  
Past 3 Months **19%**



**Television**  
[linear/live]  
Past 4 weeks **74%**



**Cinema**  
Past 4 weeks **1%**



**Radio**  
Past 4 weeks **71%**



**Out of Home Advertising**  
Past 4 weeks **58%**



**Streaming Content**  
Past 4 weeks **40%**



**\*Social Media**  
Past 4 weeks **53%**

Various timelines available

- 3 months
- 4 weeks
- 7 days
- yesterday

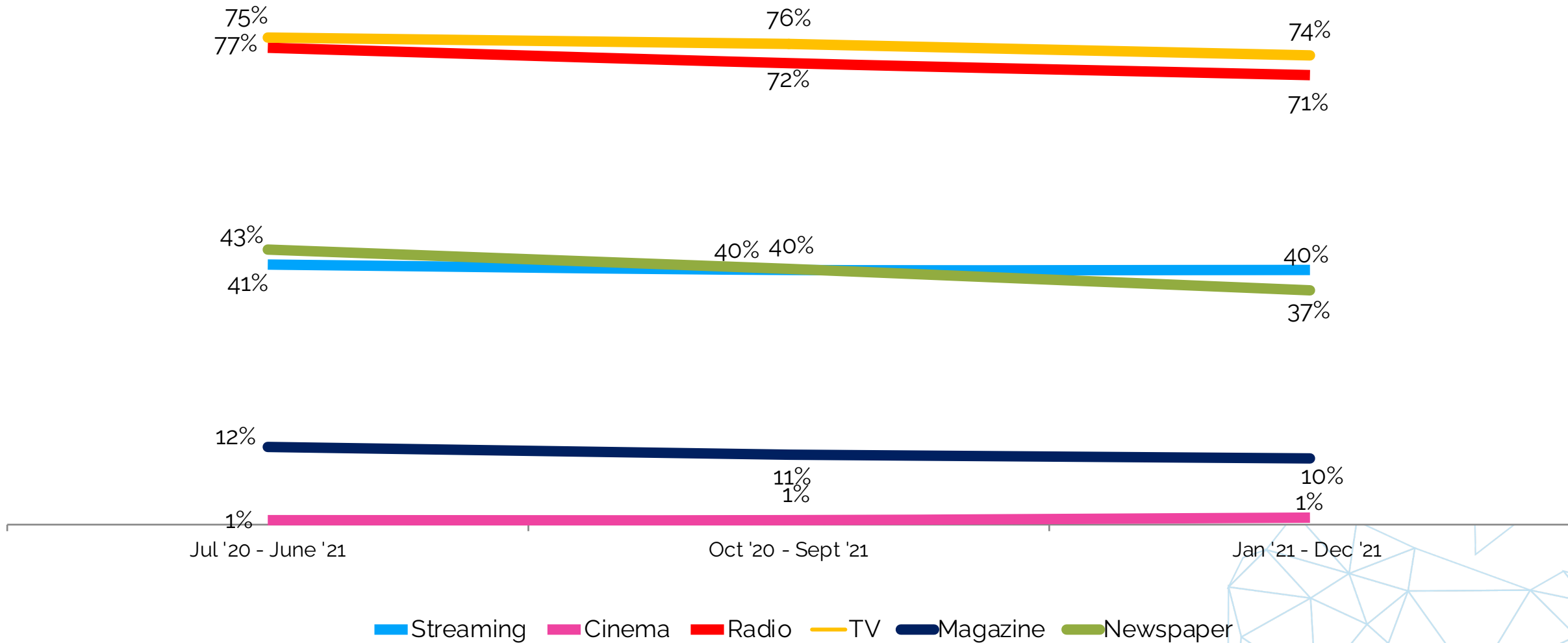
\*46% excluding WhatsApp

53% including WhatsApp



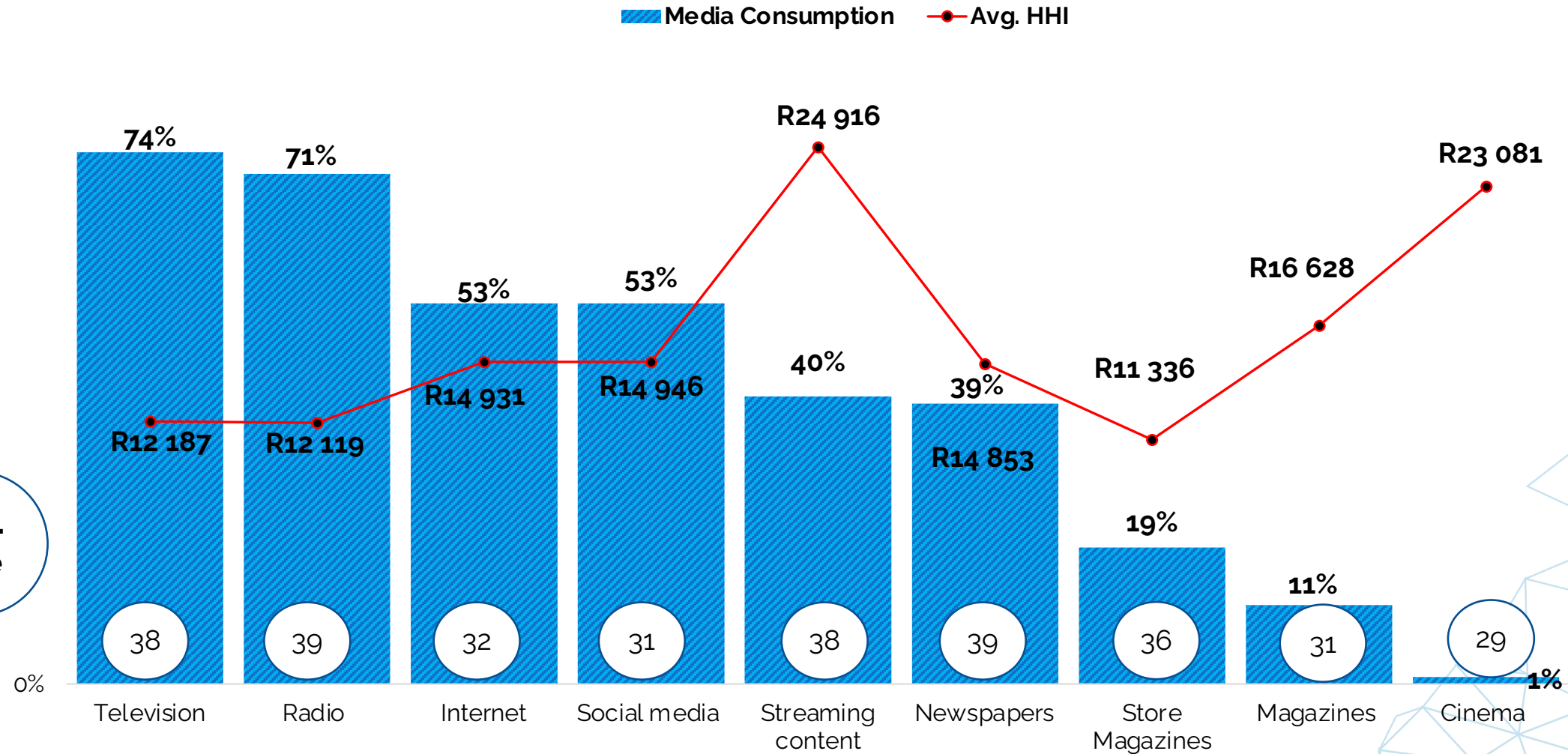
# Trended Media Outlook

## Past 4 weeks



# Media Consumption [All platforms]

Past 4 weeks



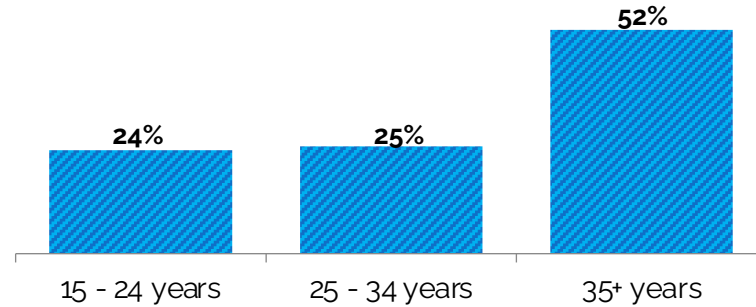
Avg.  
Age

# Media Consumption by Age Groups

Past 4 weeks

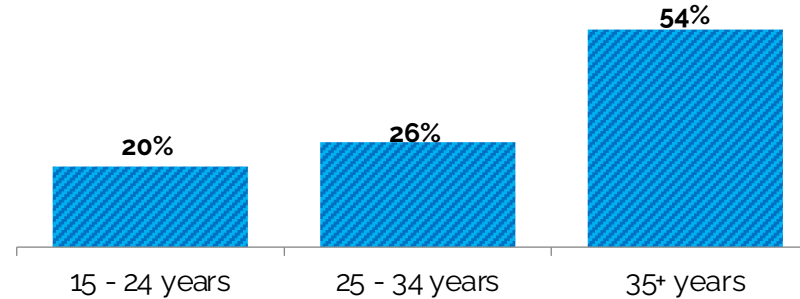
Television

n=32 544 577



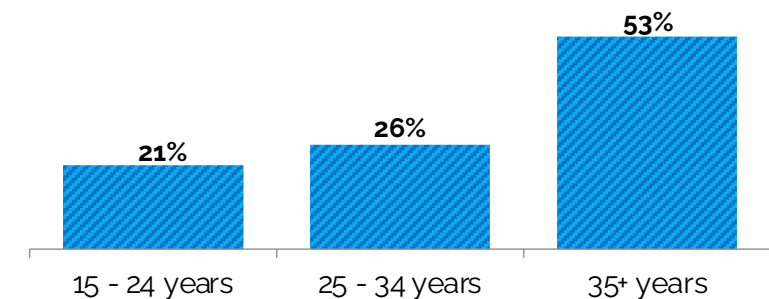
Radio

n=31 238 211



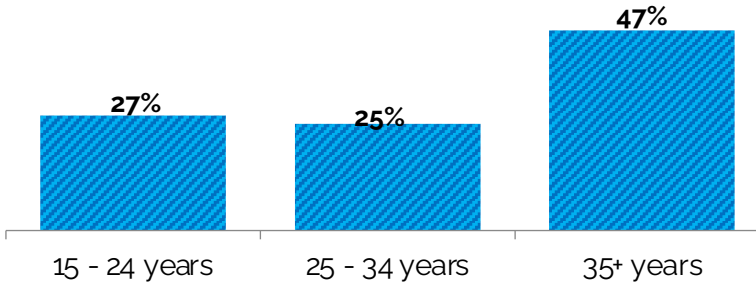
Newspapers

n=17 333 659



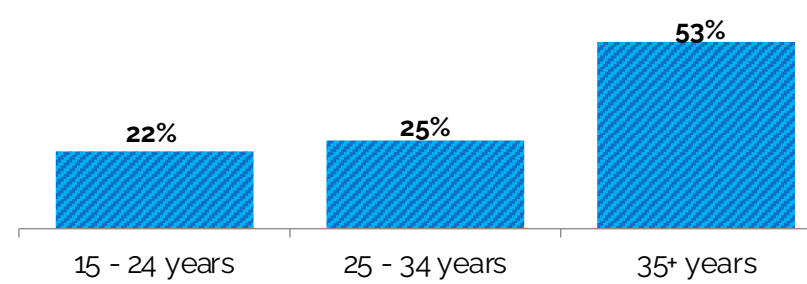
Magazines

n=4 751 110



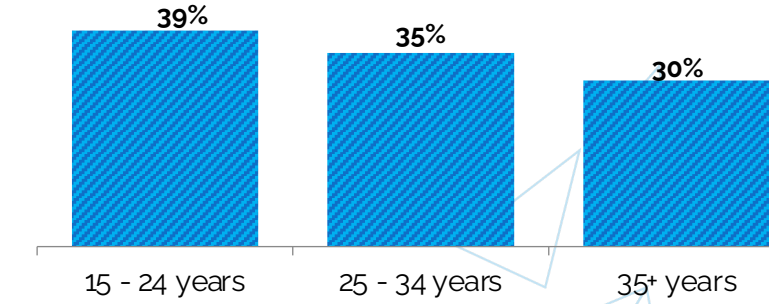
Store Magazines

n=8 228 256



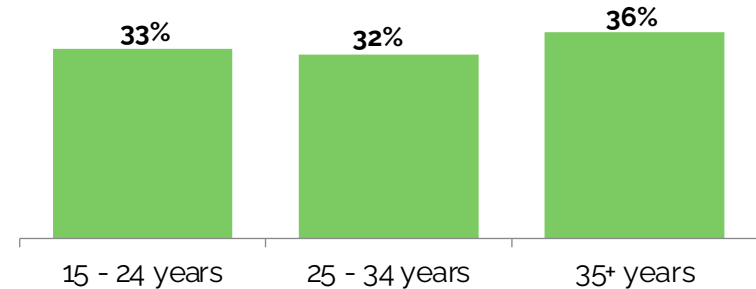
Cinema

n=524 843



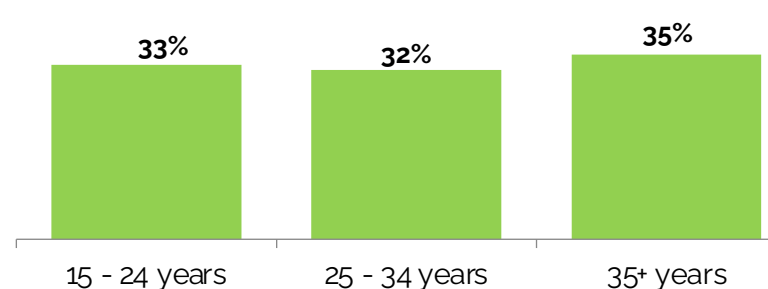
Internet

n=23 519 661



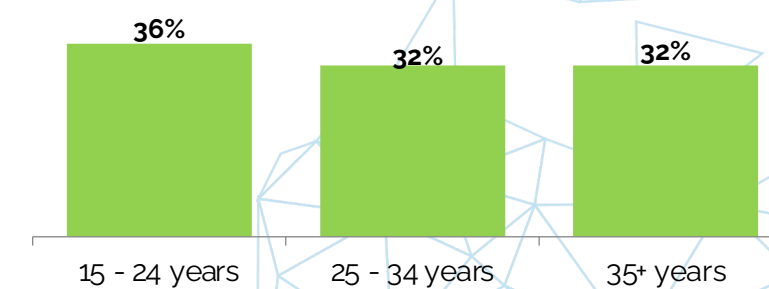
Social Media

n=23 072 468



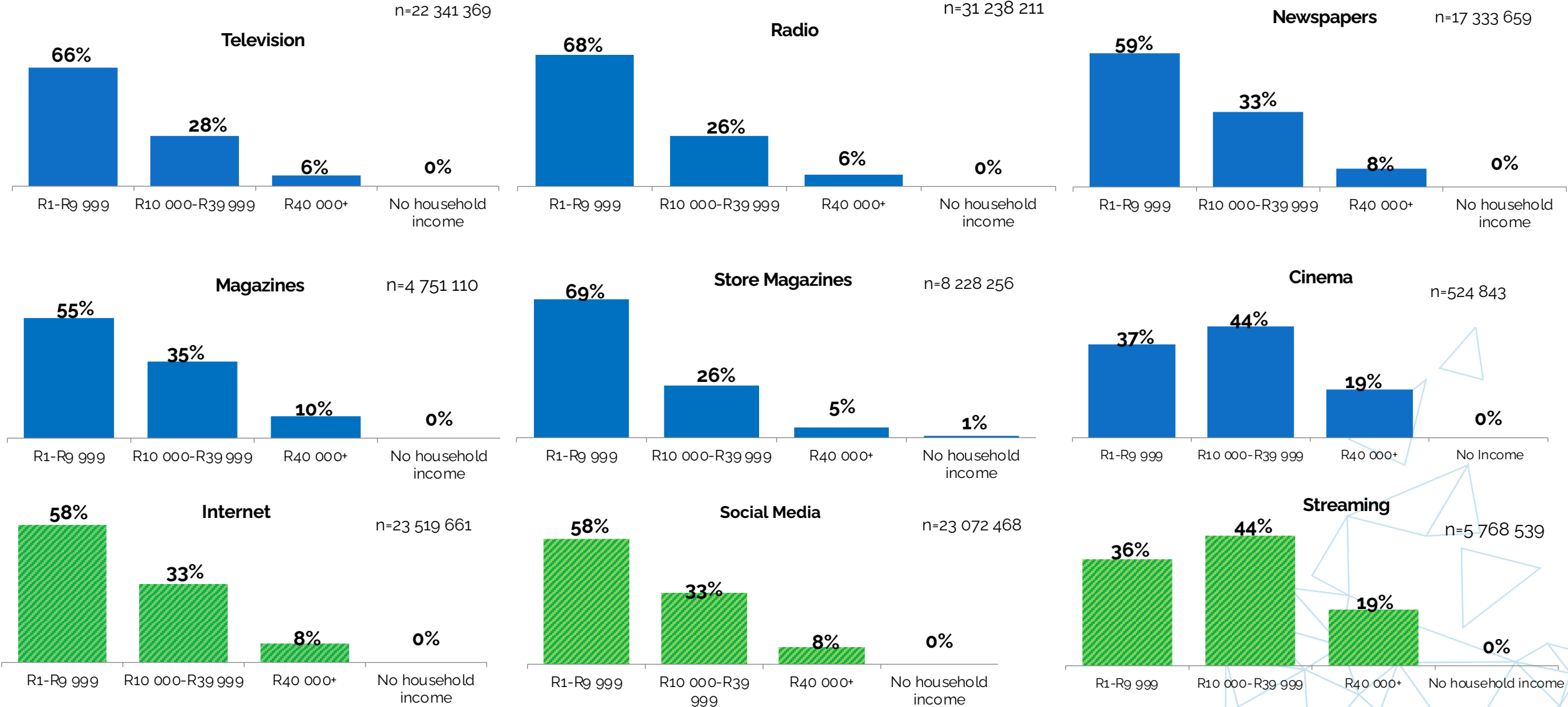
Streaming

n=5 768 539



# Media Consumption by HH Income bands

Past 4 weeks



# TELEVISION

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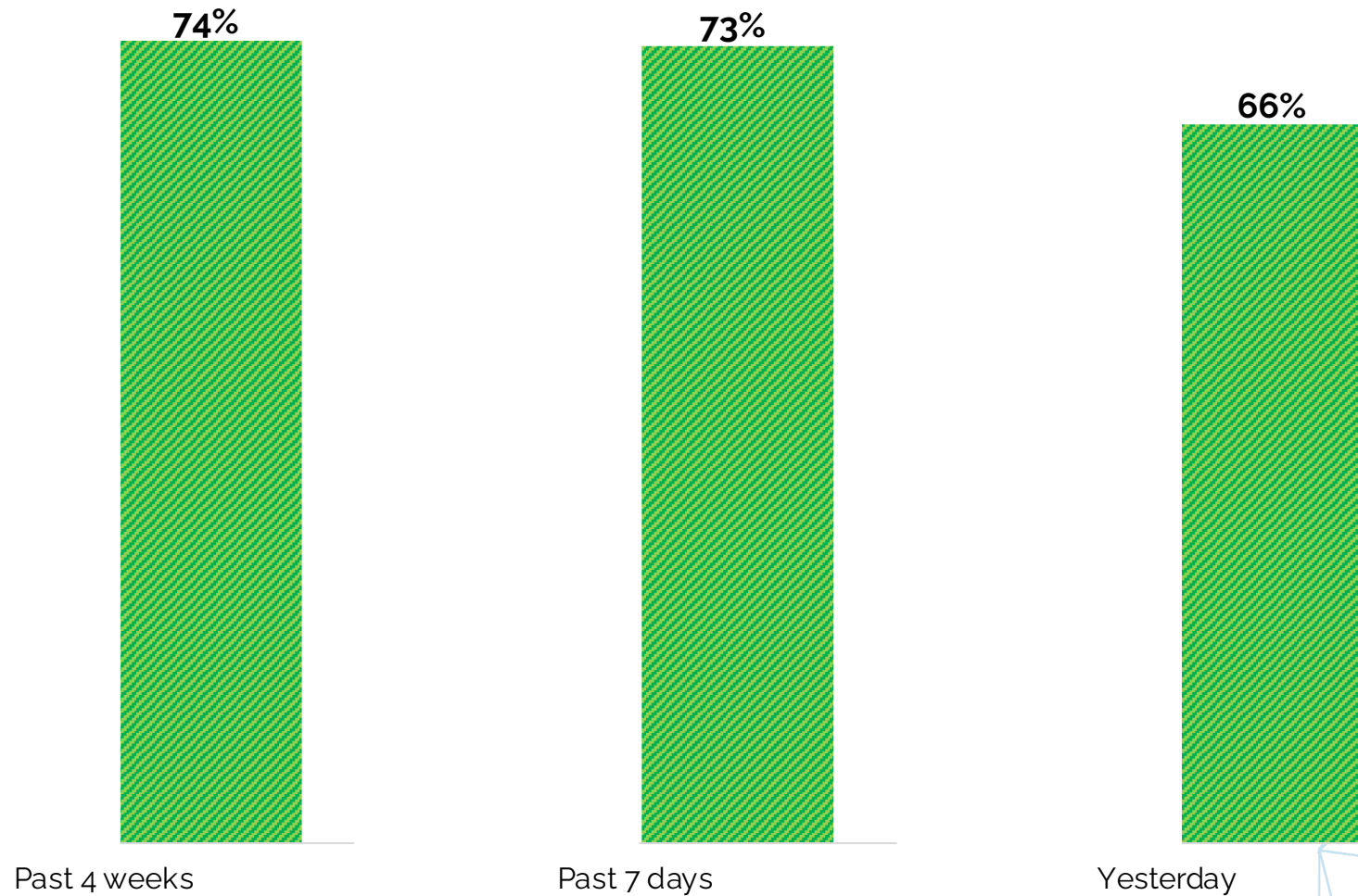




# Television Audience

Television Audience [Yesterday, P7D, P4W]

■ Jan '21 - Dec '21



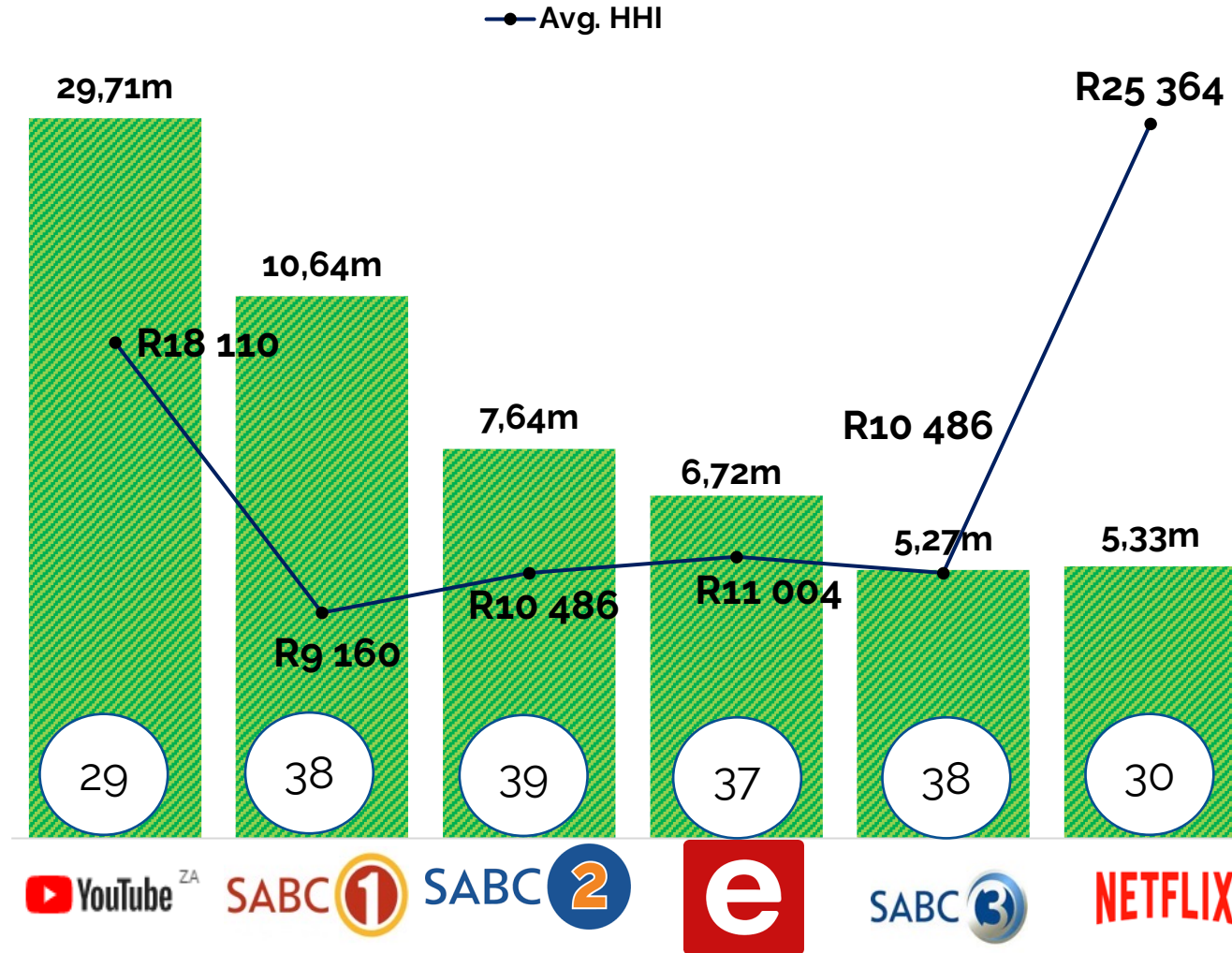
# Top TV channels and Selected Streaming Services Viewed



Past 4 weeks

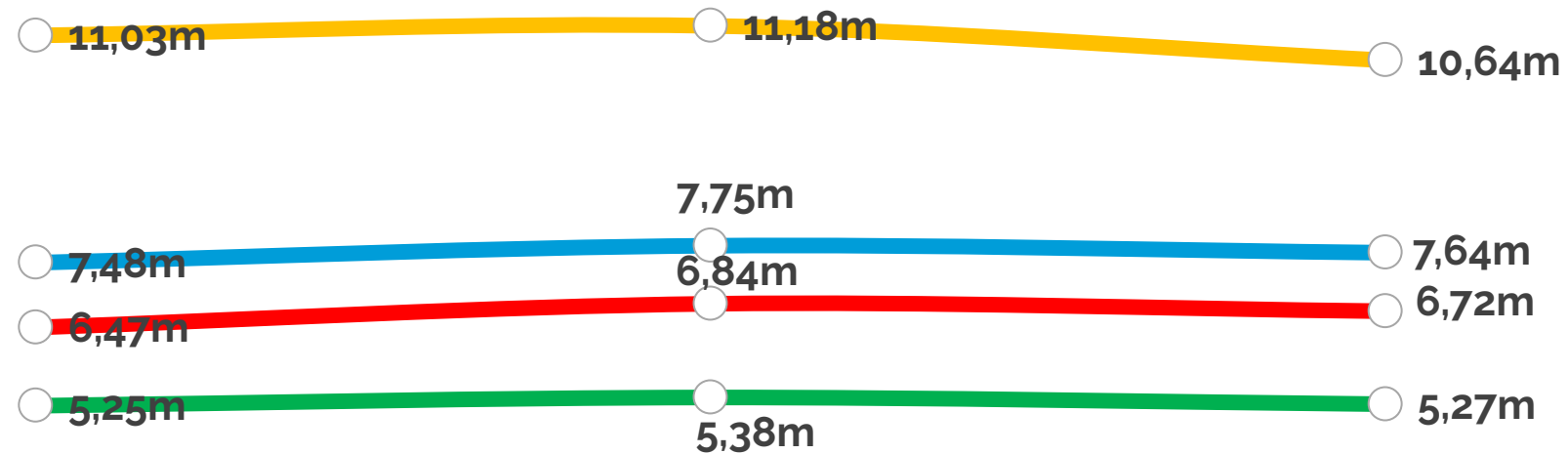
TV  
Penetration  
66%

Avg.  
Age



# Top TV Channels

Past 4 weeks



July '20 - June '21

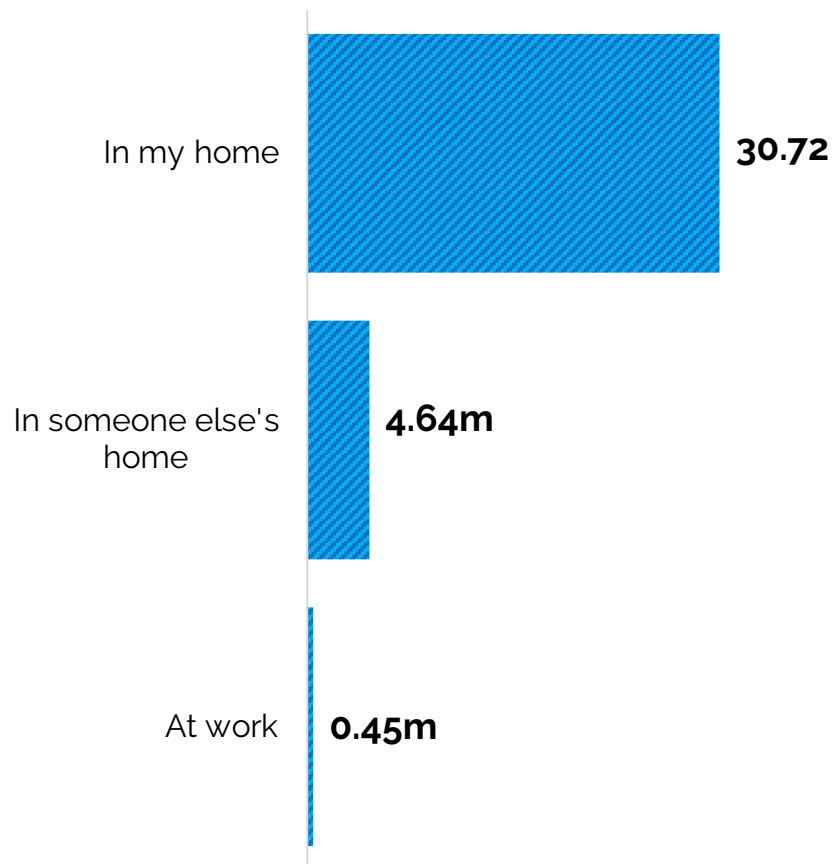
Oct '20 - Sept '21

Jan '21 - Dec '21

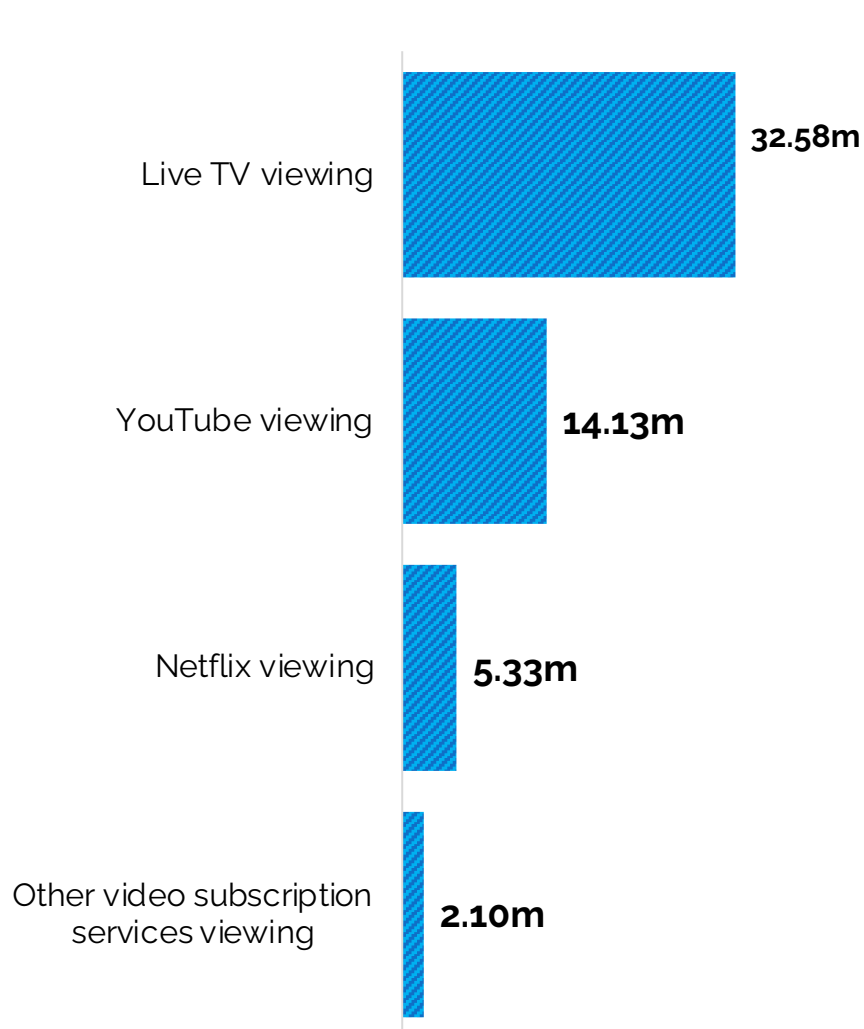
 **SABC 1**
 **SABC 2**
 **SABC 3**
 **e.tv**

# Behaviour: Television

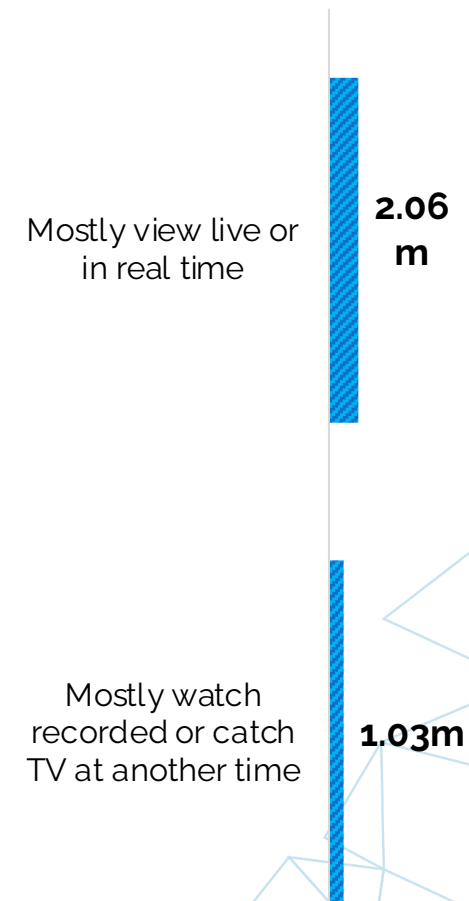
## Top TV viewing location: Past 7 days



## Live TV vs. Streaming Services: P4W



## PVR: Usual mode for watching TV programmes



# RADIO

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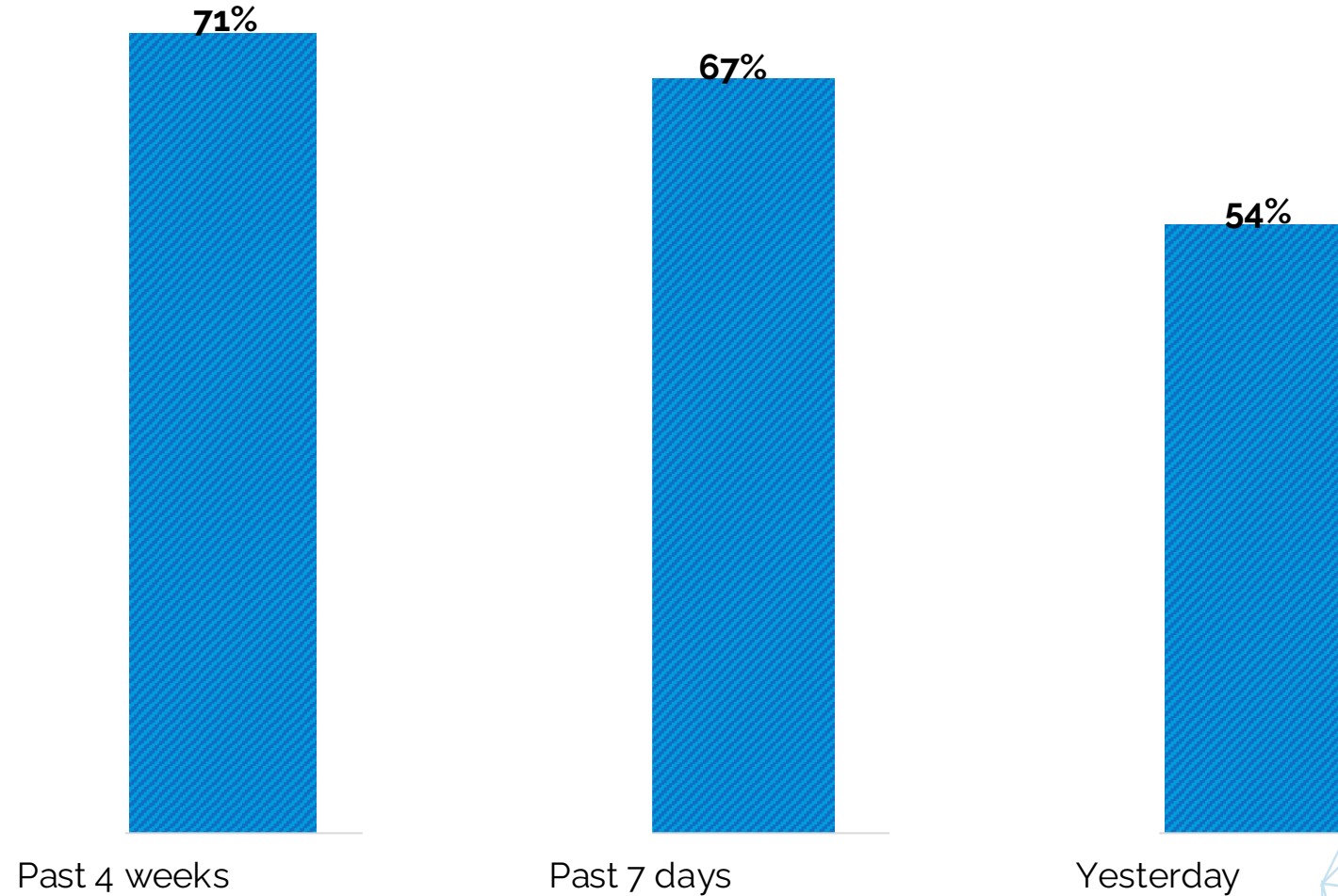




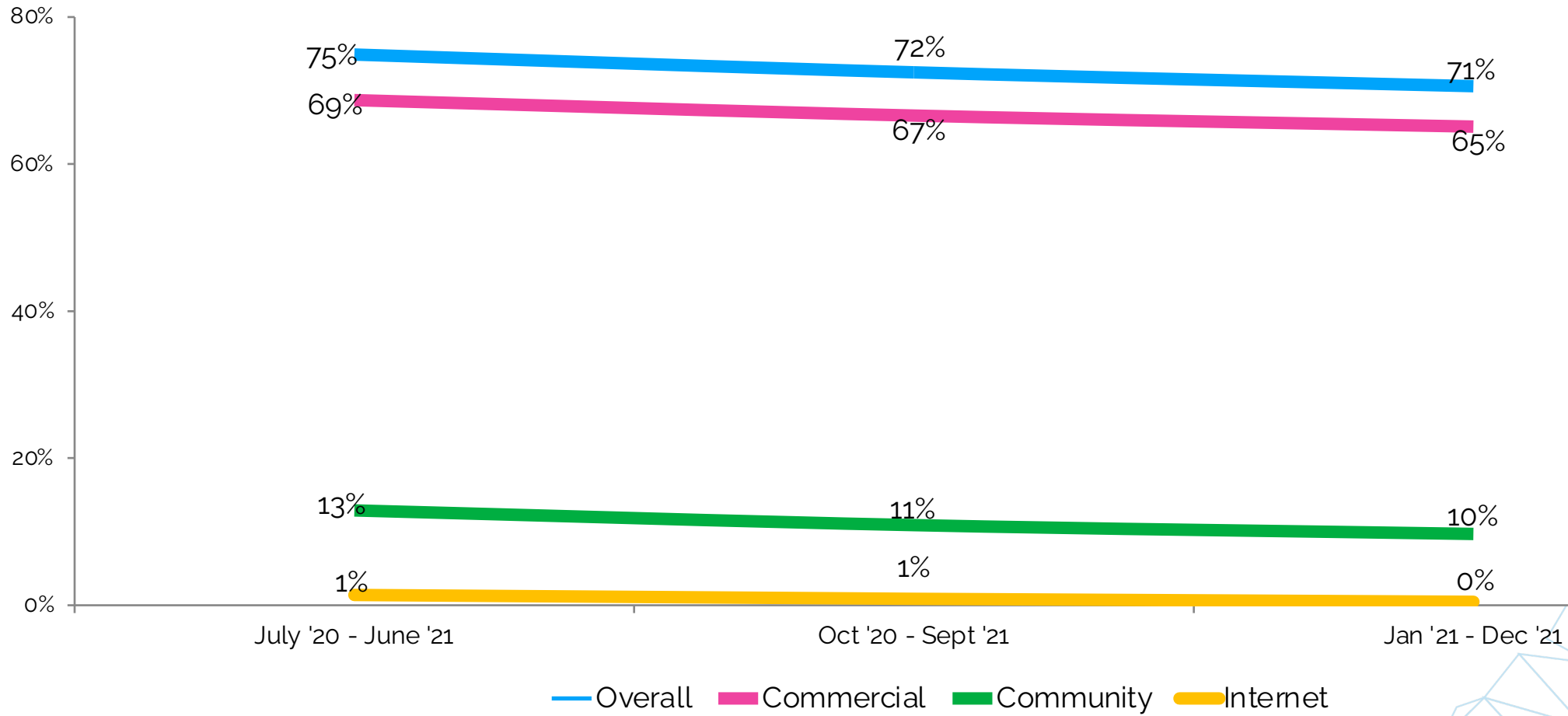
# Radio Listenership

## Radio Listenership [Yesterday, P7D, P4W]

■ Jan '21 - Dec'21



# Trended Radio Listenership

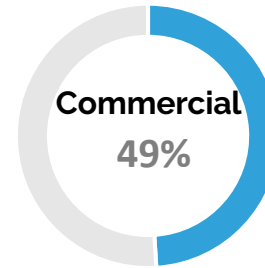
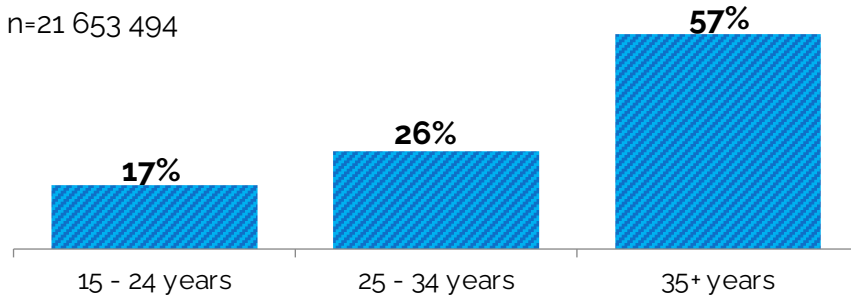


# Radio Reach [Yesterday]

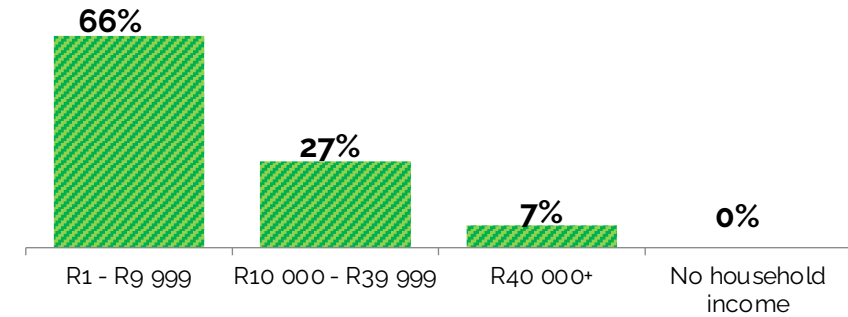
Total Radio Reach [Yesterday]  
**54%**

## Age

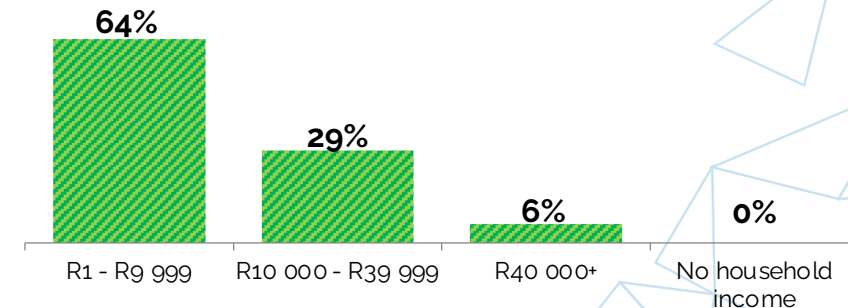
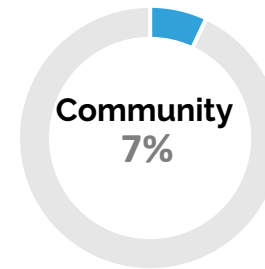
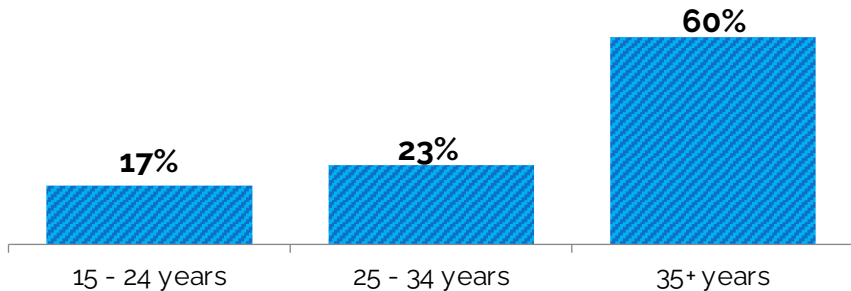
n=21 653 494



## Household Income



n=3 174 669



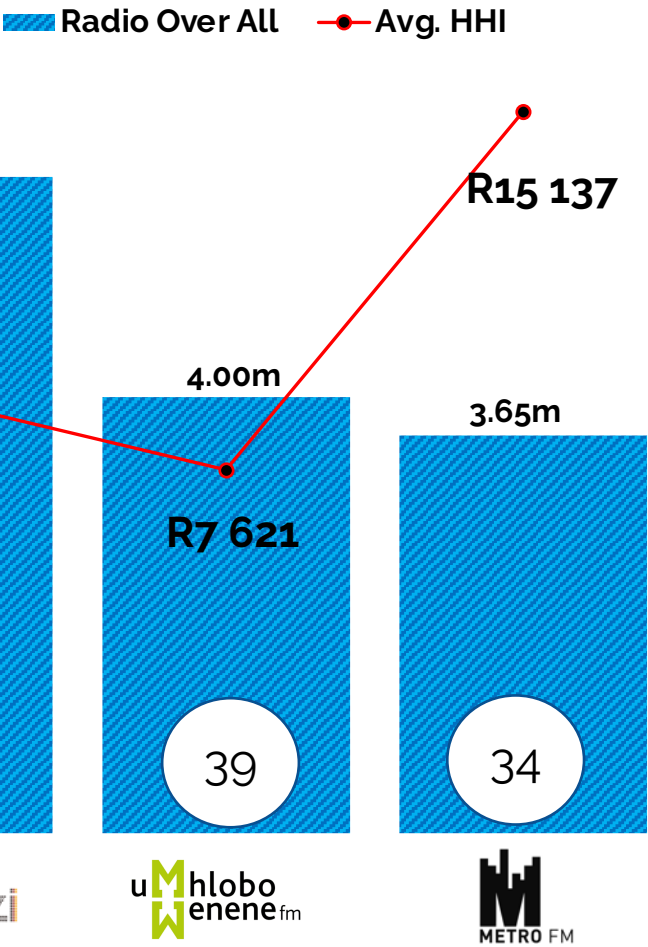
Note: \*Percentages not adding up to 100% due to rounding off

# Top Radio Stations Listened to

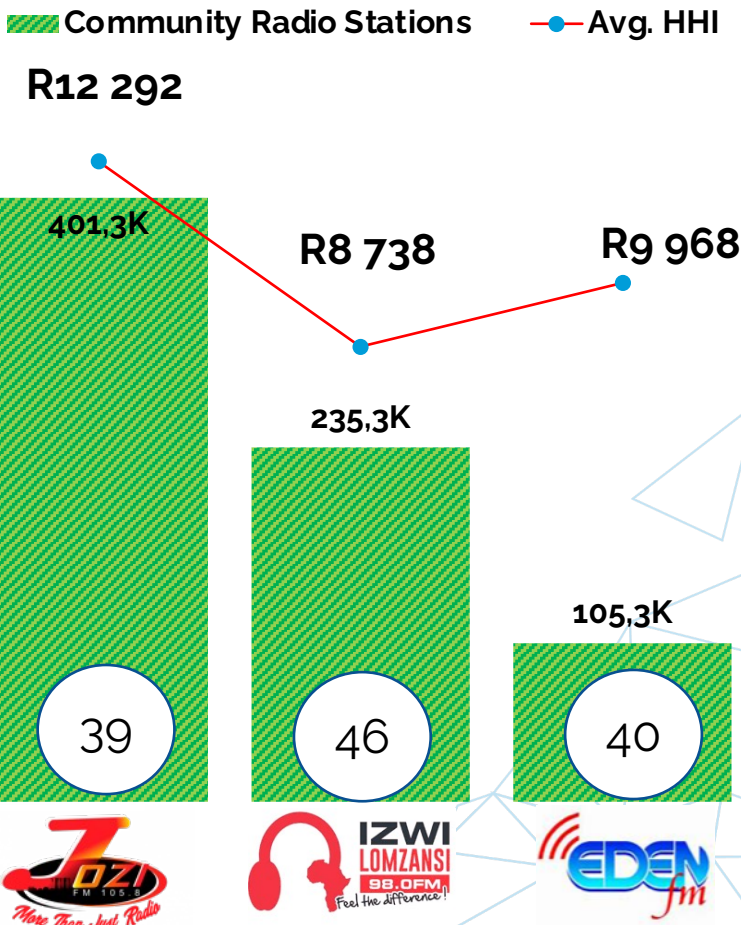
Past 4 weeks



## Overall radio

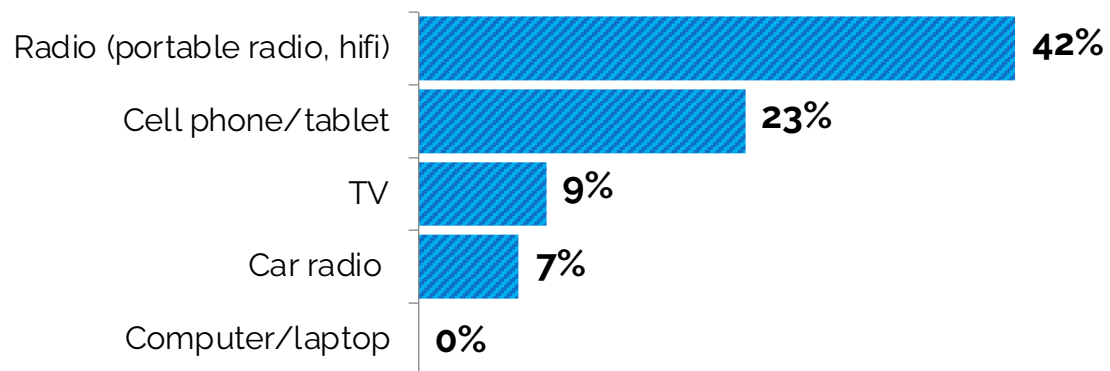


## Community Radio

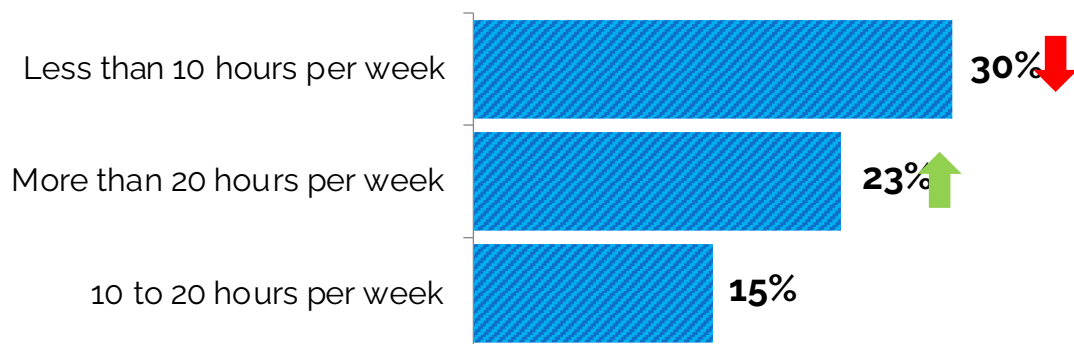


# Behaviour: Radio

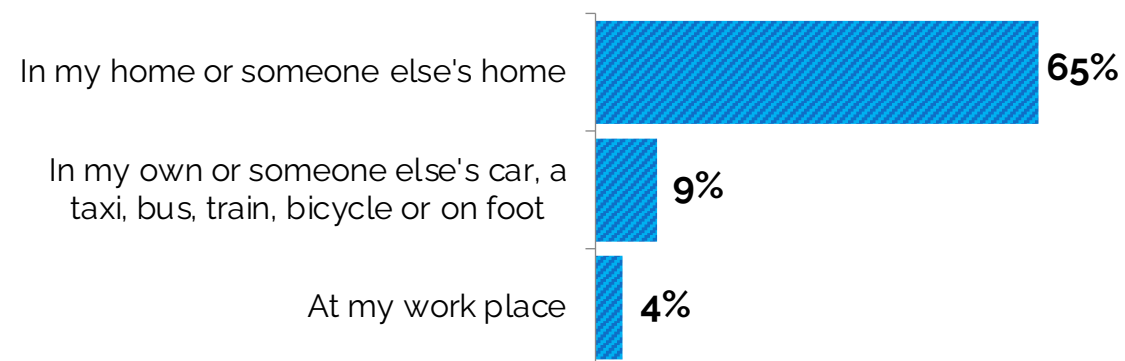
## Usual radio device



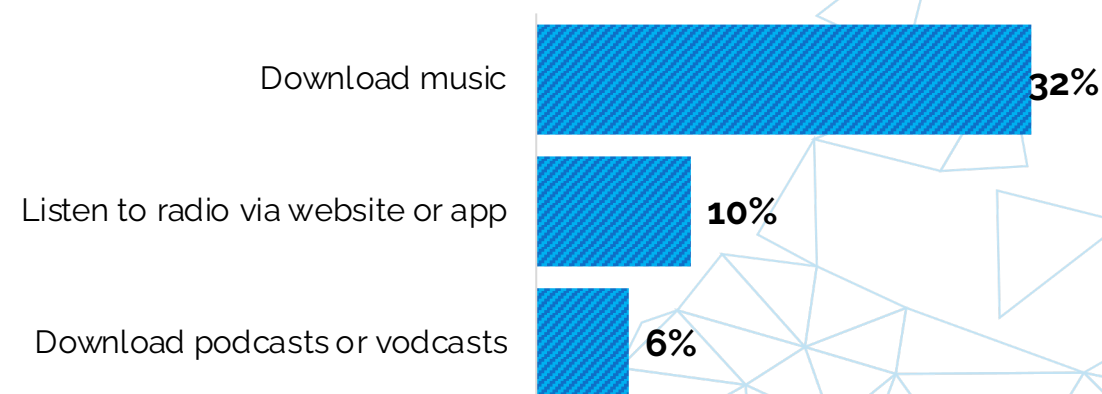
## Time spent on radio listening



## Usual location for radio listening



## Radio related internet activities: Past 4 weeks





# PRINT MEDIA

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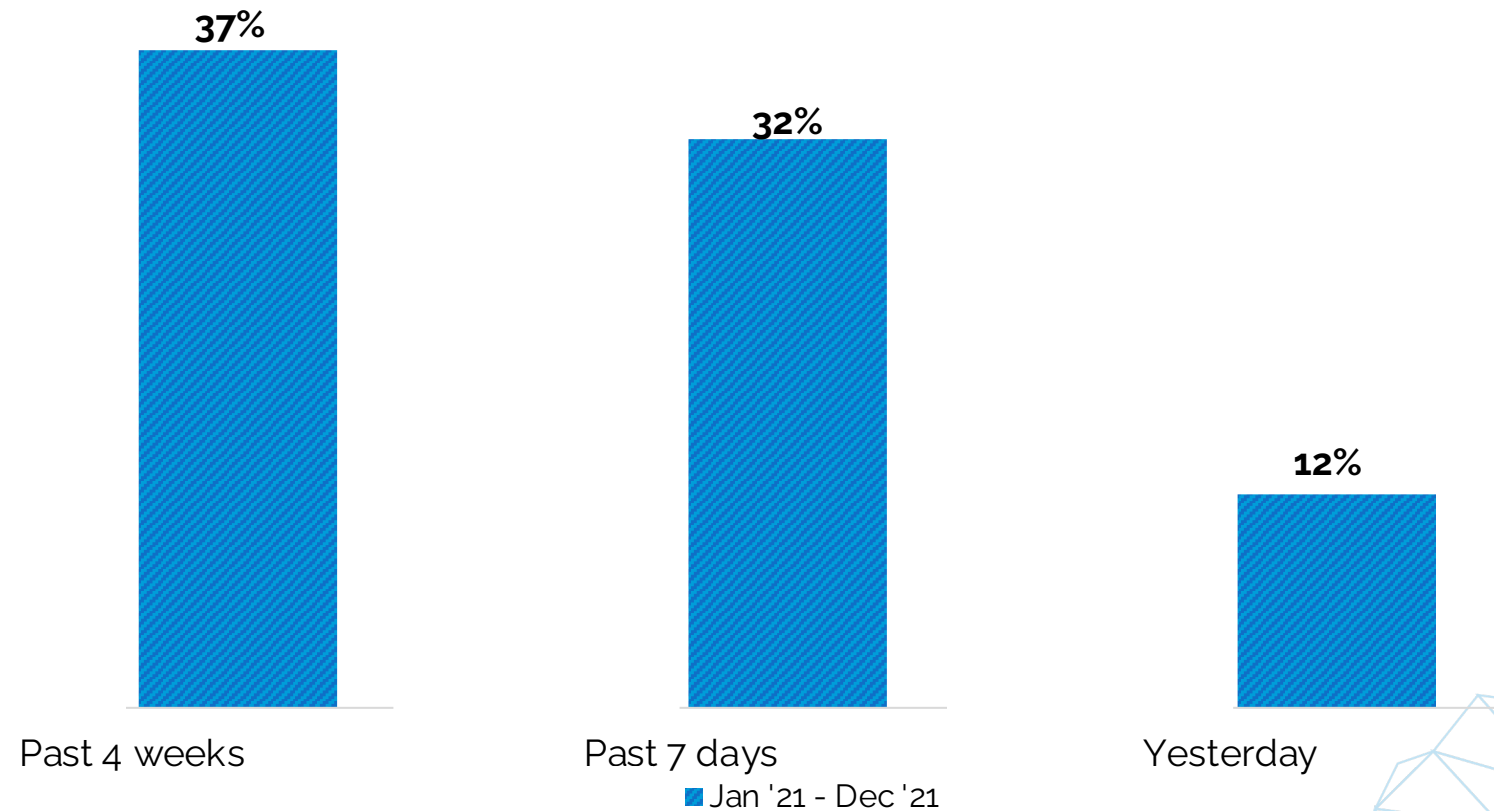
# NEWSPAPERS

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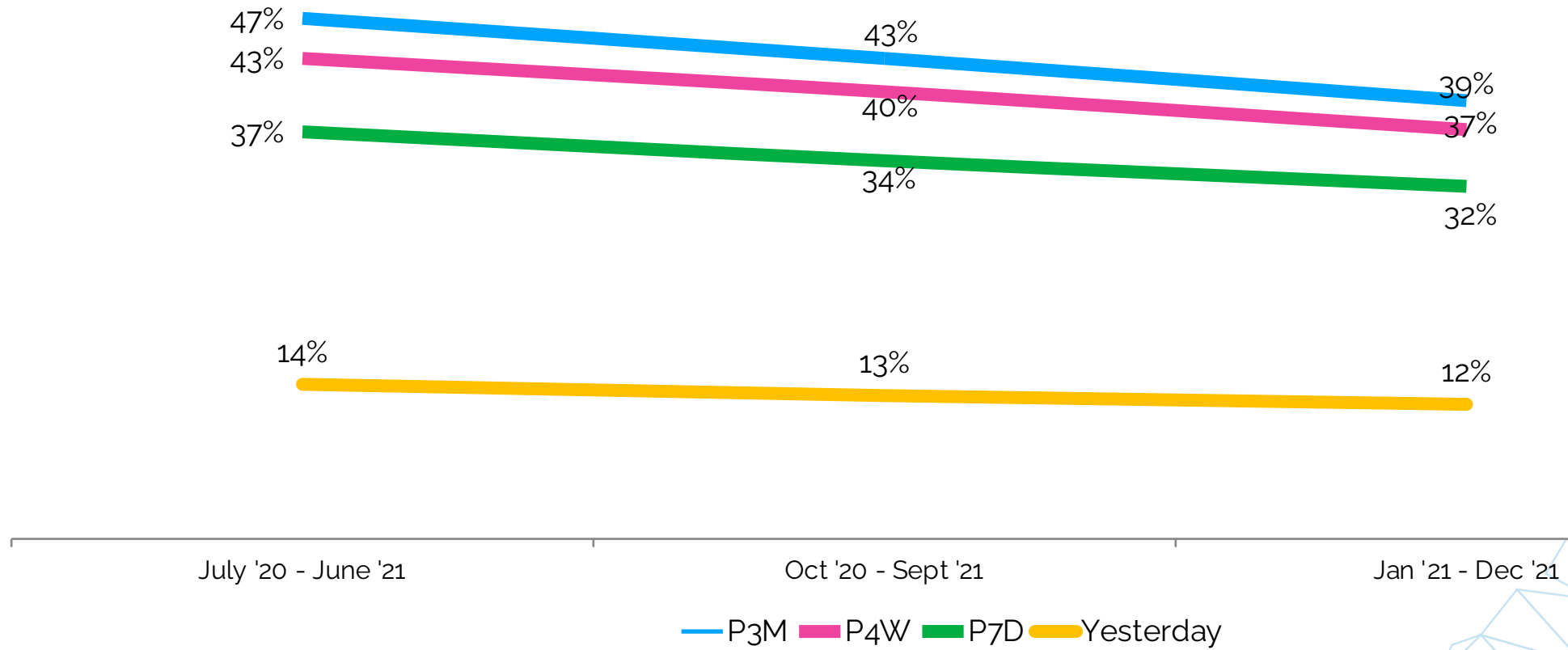


# Newspaper Readership

## Newspaper Readership [Yesterday, P7D, P4W]



# Trended Newspaper Readership

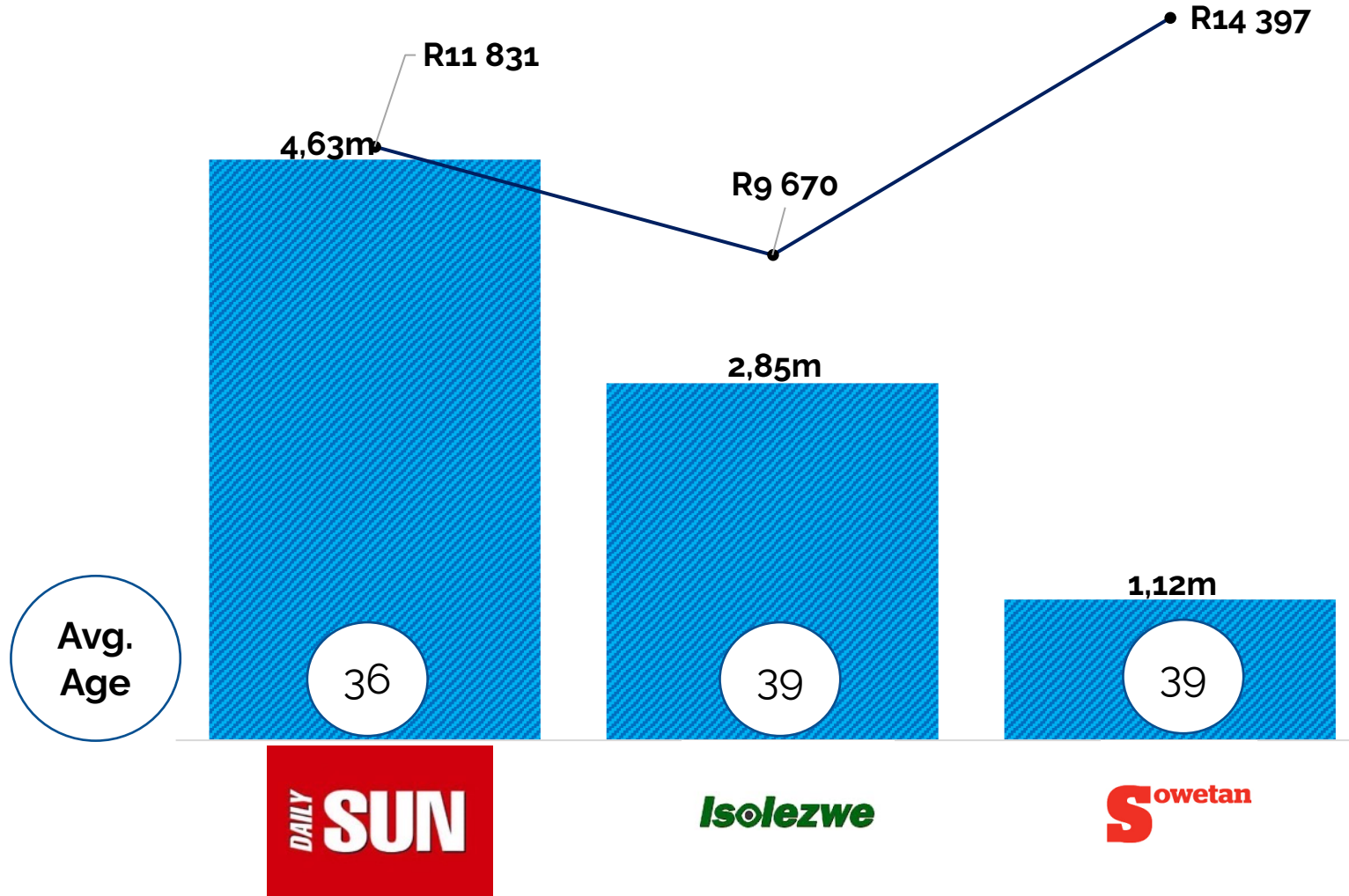


# Top 3 Newspapers [Dailies] Read

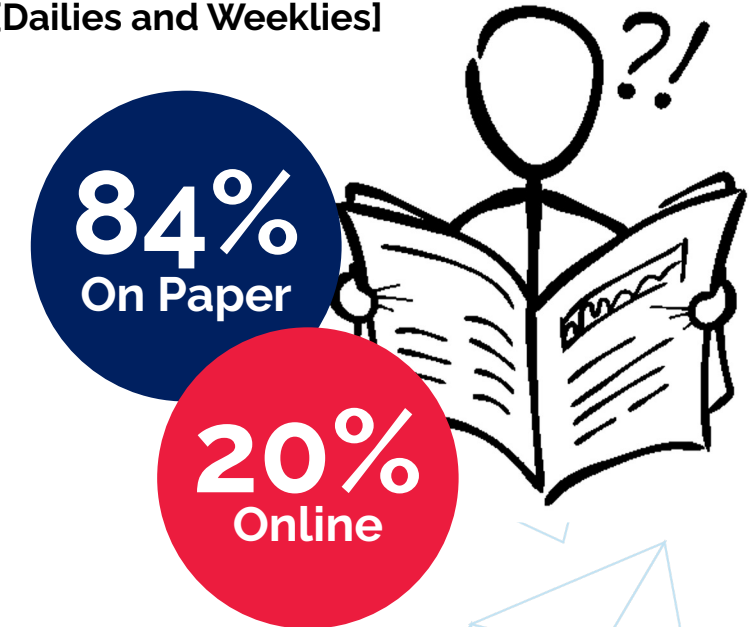
Past 3 months

39% respondents have read newspapers in the past 3 months.

Top Daily Newspapers Avg. HHI

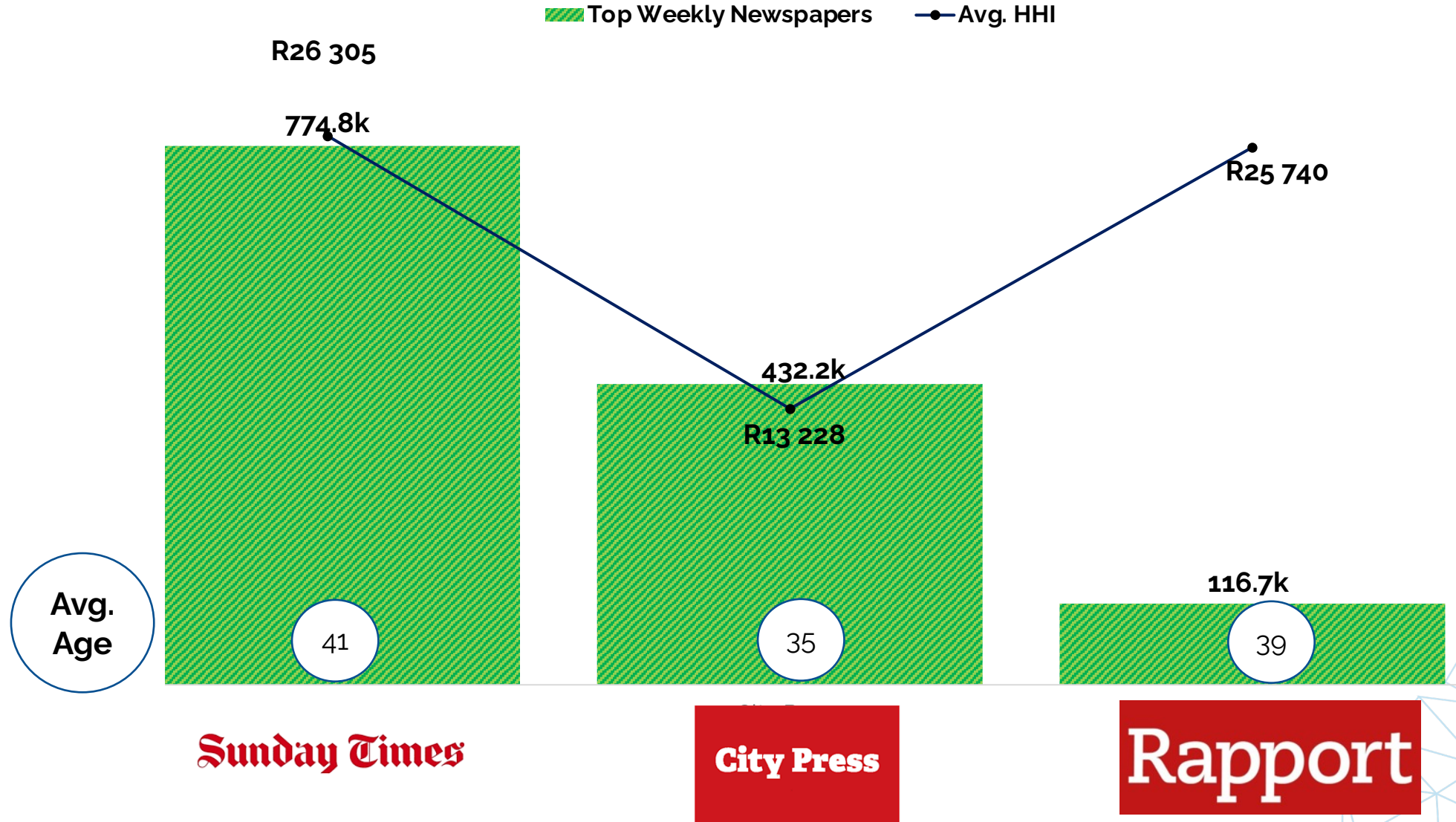


Platforms used to read newspapers  
[Dailies and Weeklies]





# Top 3 Newspapers [Weeklies] Read



# MAGAZINES

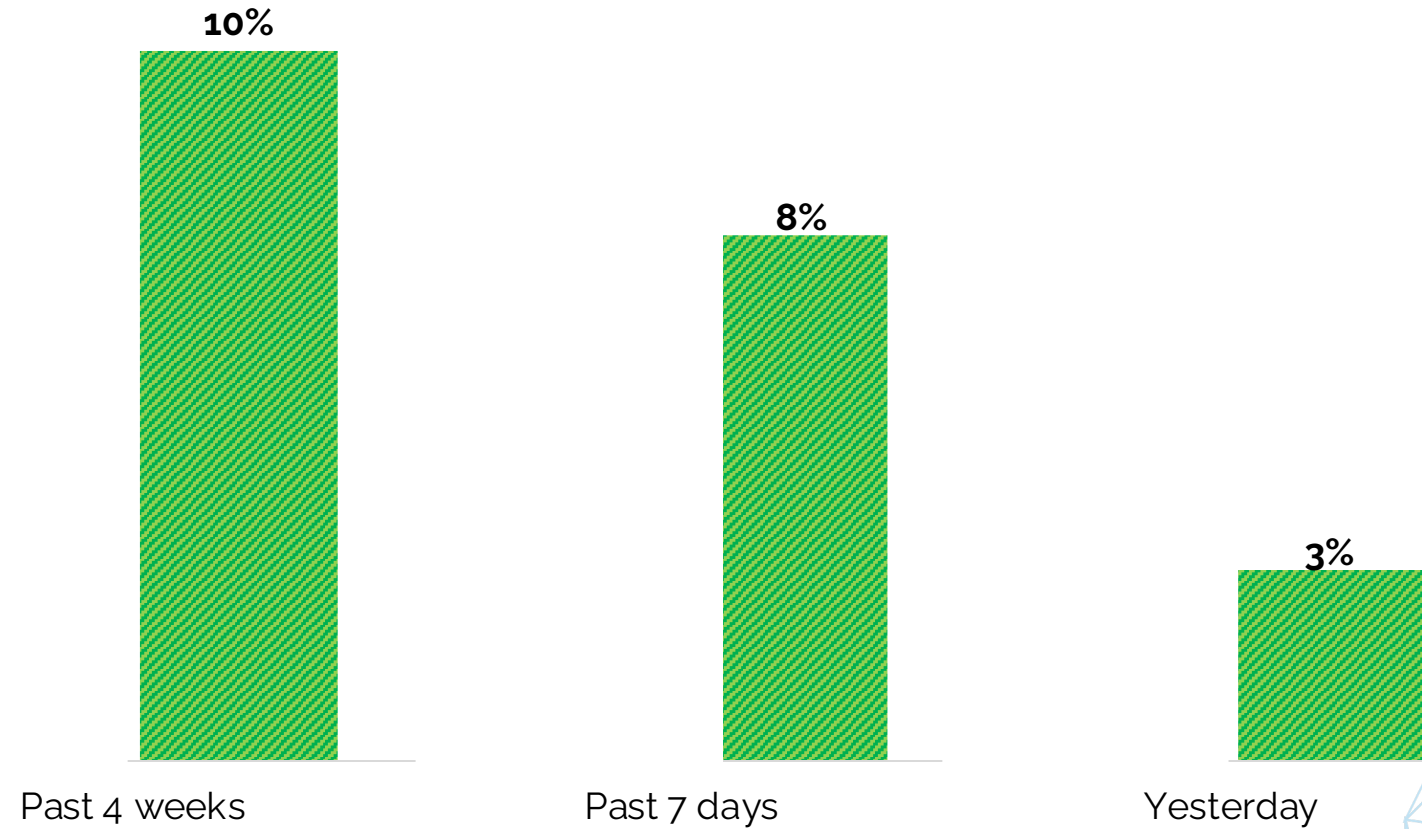
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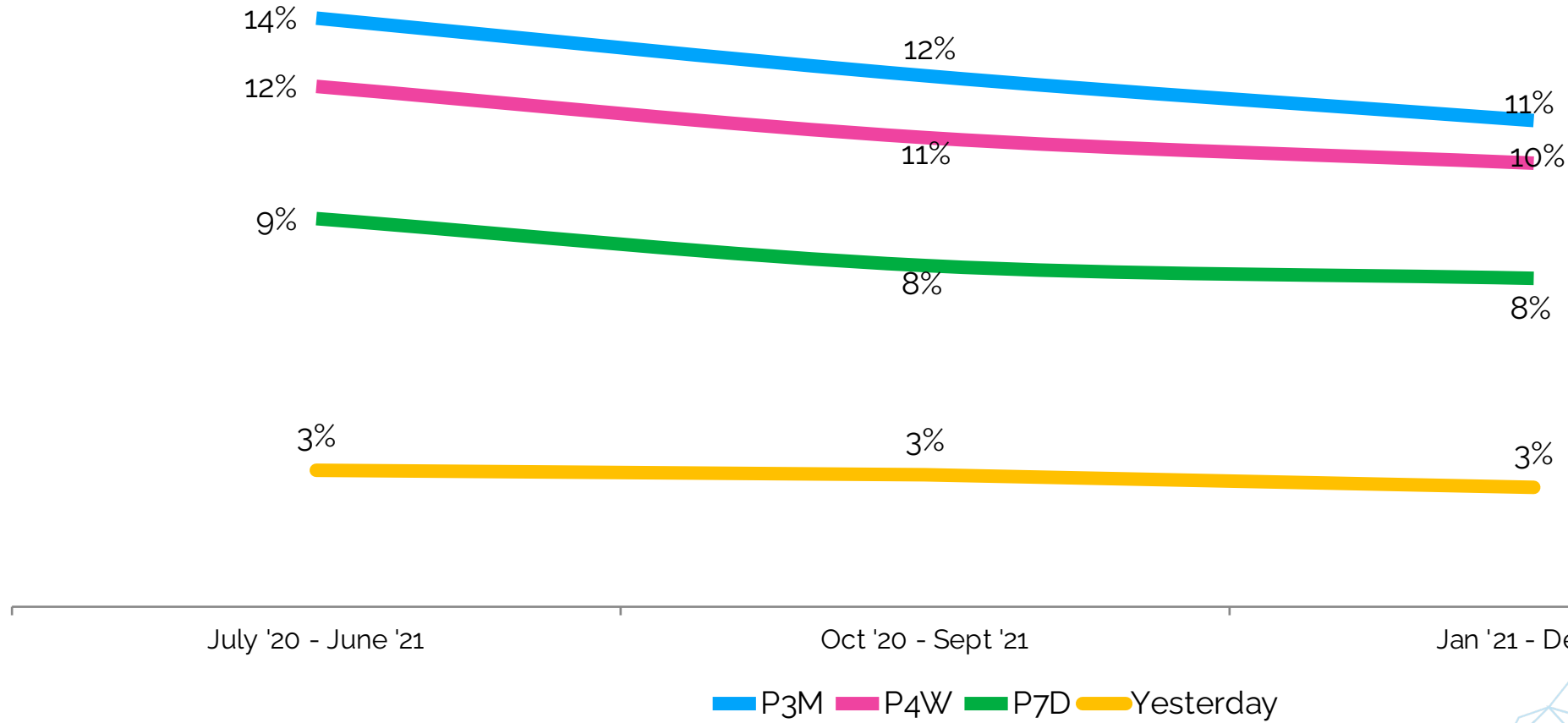
# Magazine Readership

## Magazine Readership [Yesterday, P7D, P4W]

Jan '21 - Dec '21

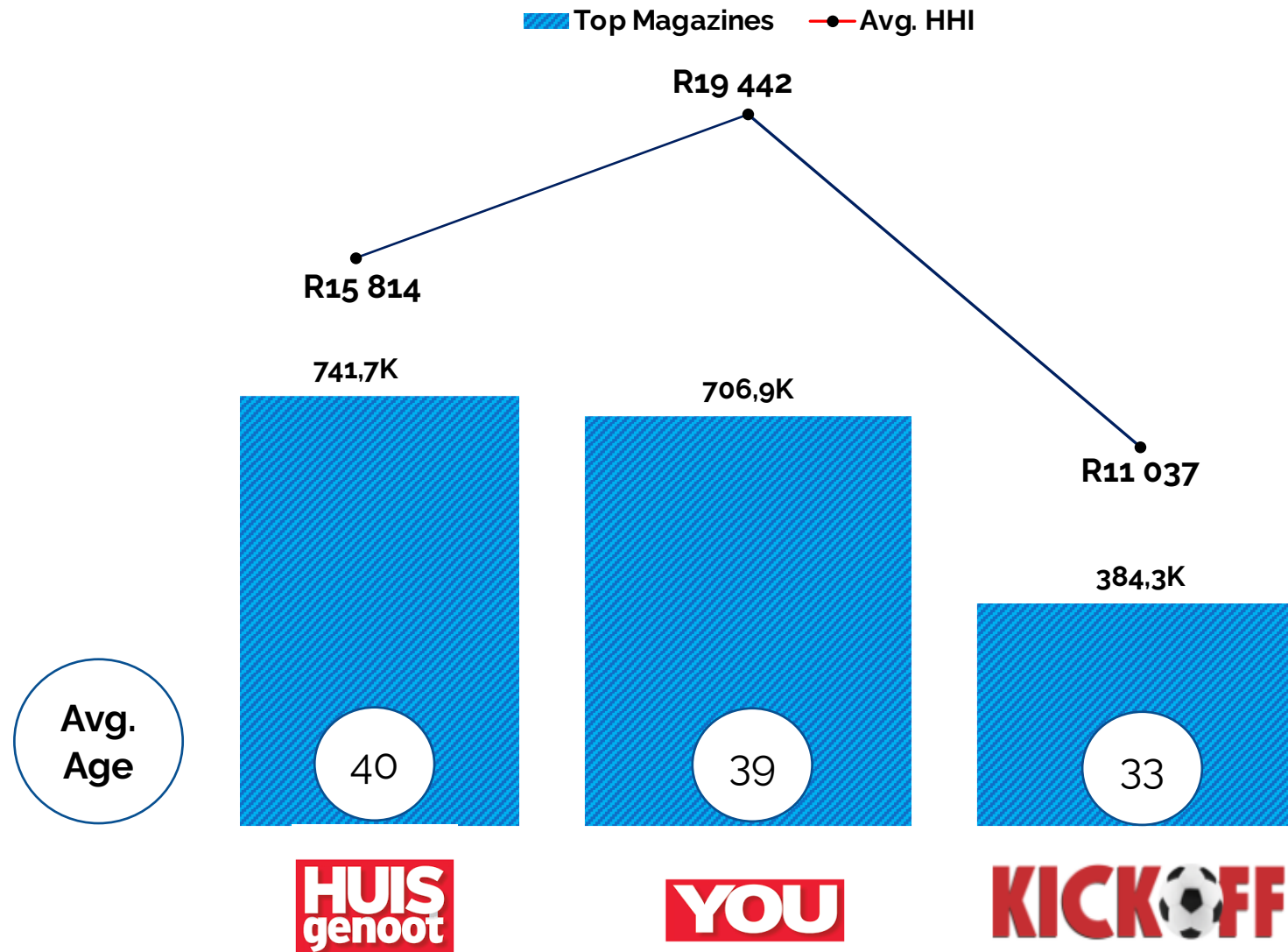


# Trended Magazine Readership



# Top 3 Magazines Read

Past 3 months



**11%** respondents have read magazines in the past 3 months.

**Platforms used to read magazines**



# STORE MAGAZINES

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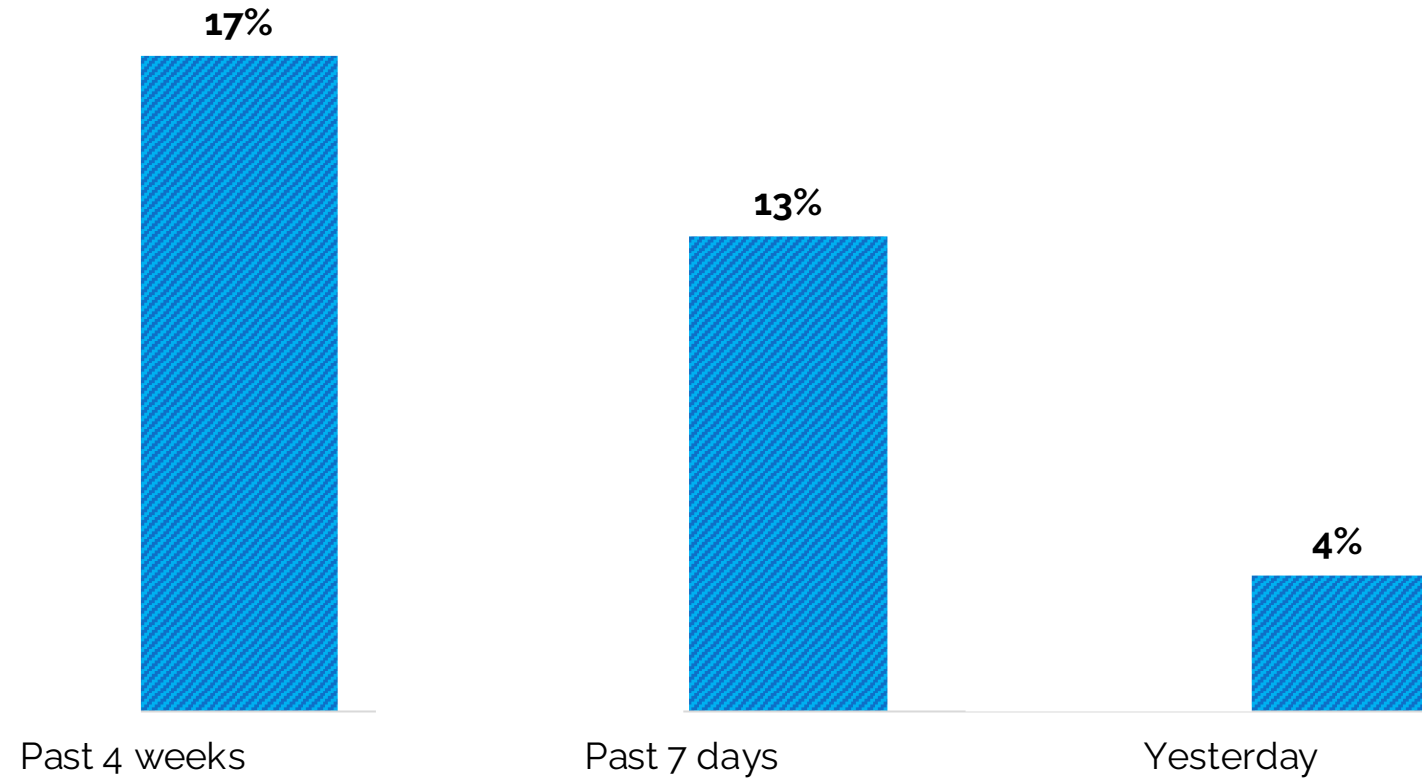




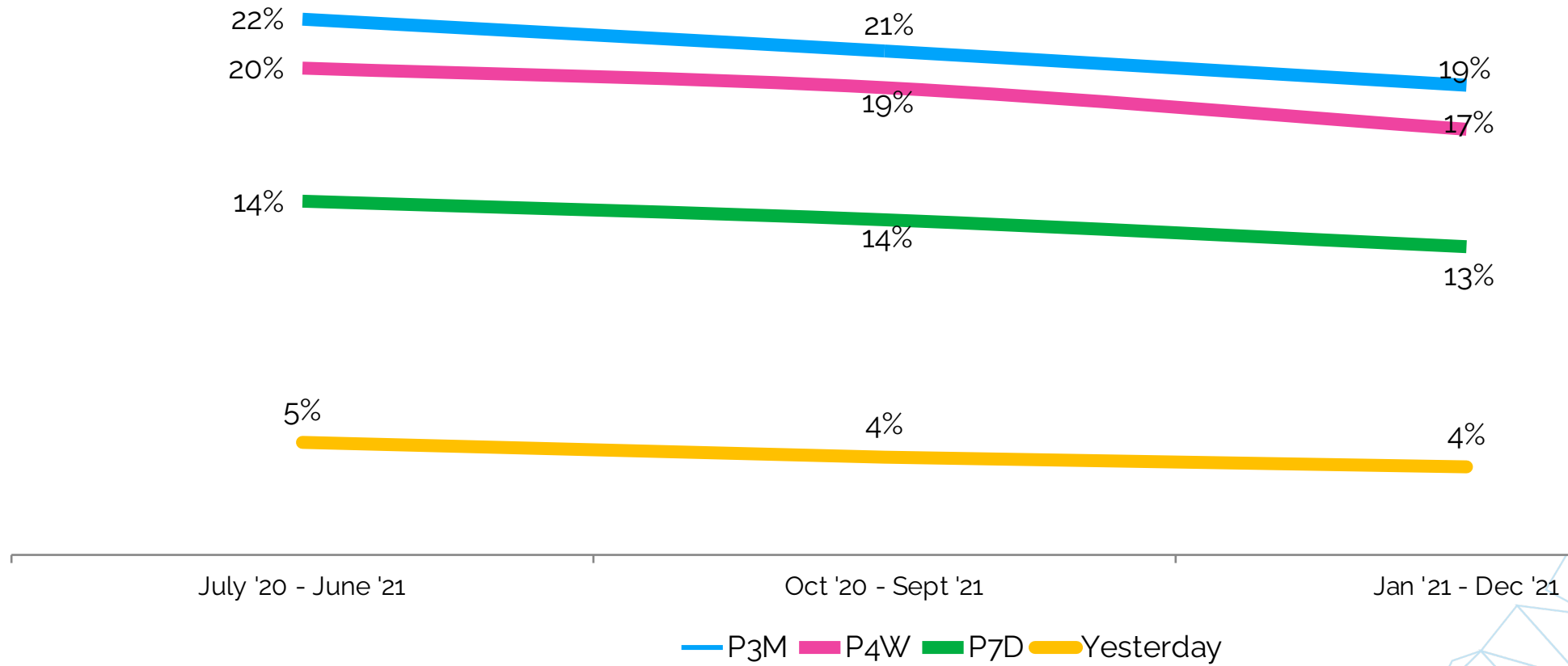
# Store Magazine Readership

## Store Magazine Readership [Yesterday, P7D, P4W]

■ Jan '21 - Dec '21

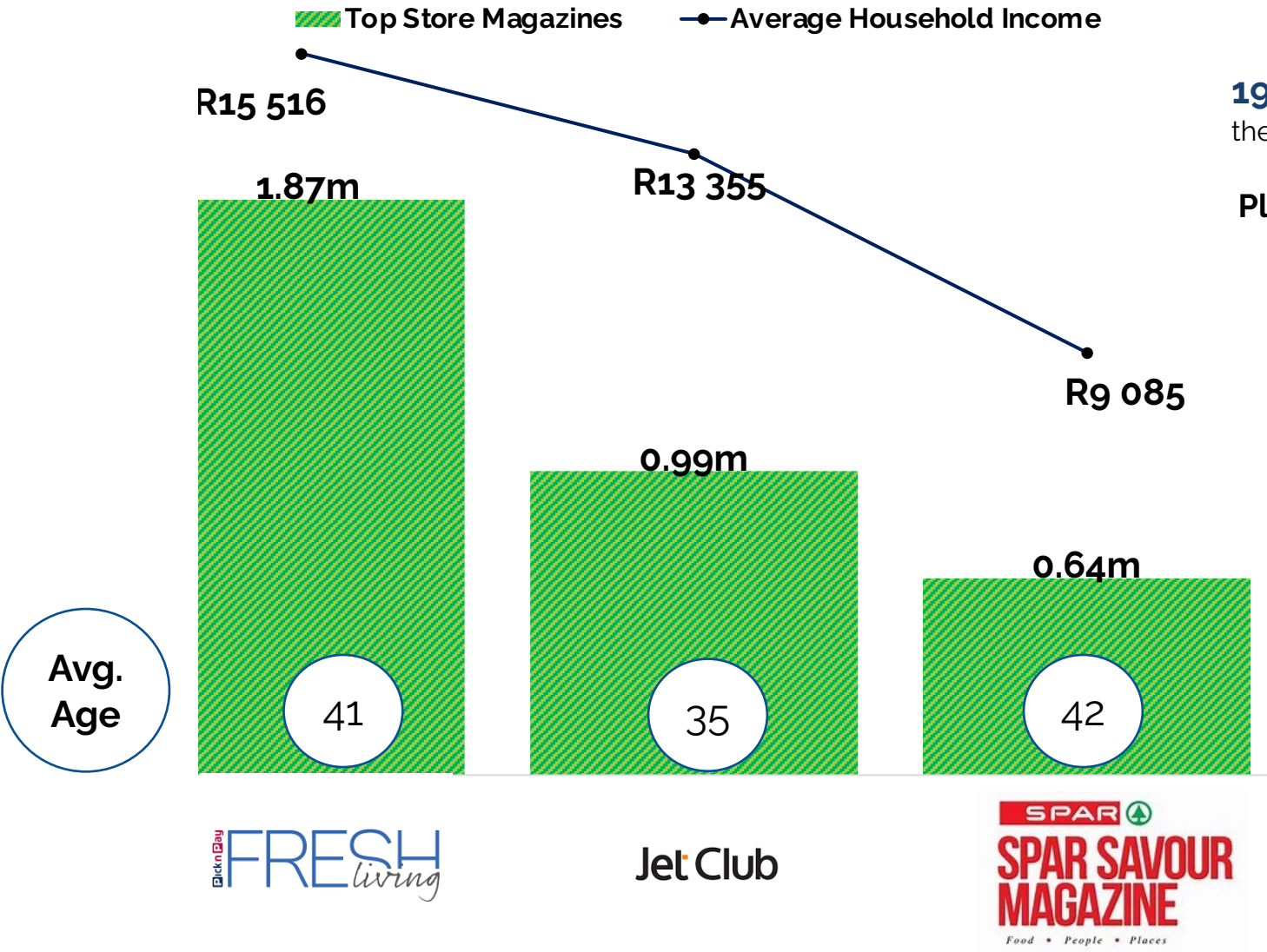


# Trended Store Magazine Readership



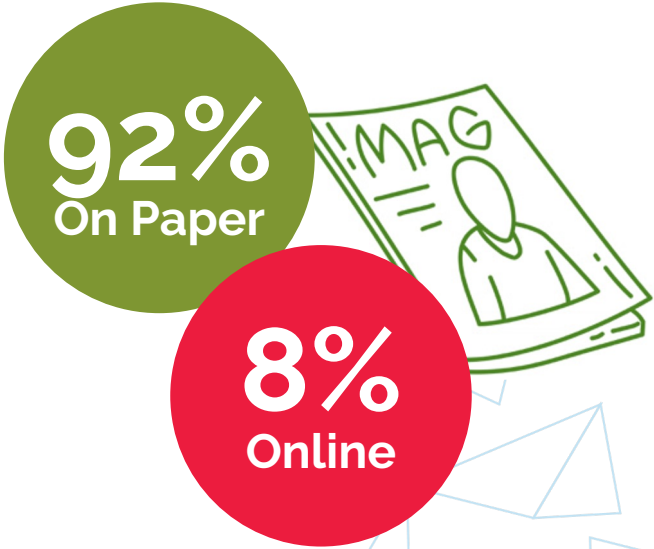
# Top 3 Store Magazines Read

Past 3 months



**19%** respondents have read store magazines in the past 3 months.

Platforms used to read store magazines



# NEWSPAPER INSERTS

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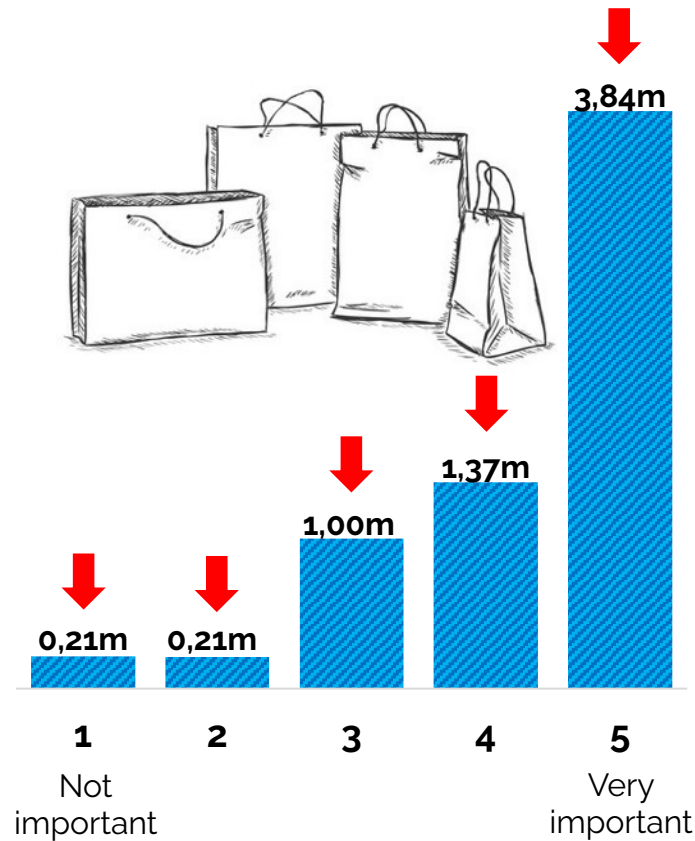


# NEWSPAPER INSERTS READ

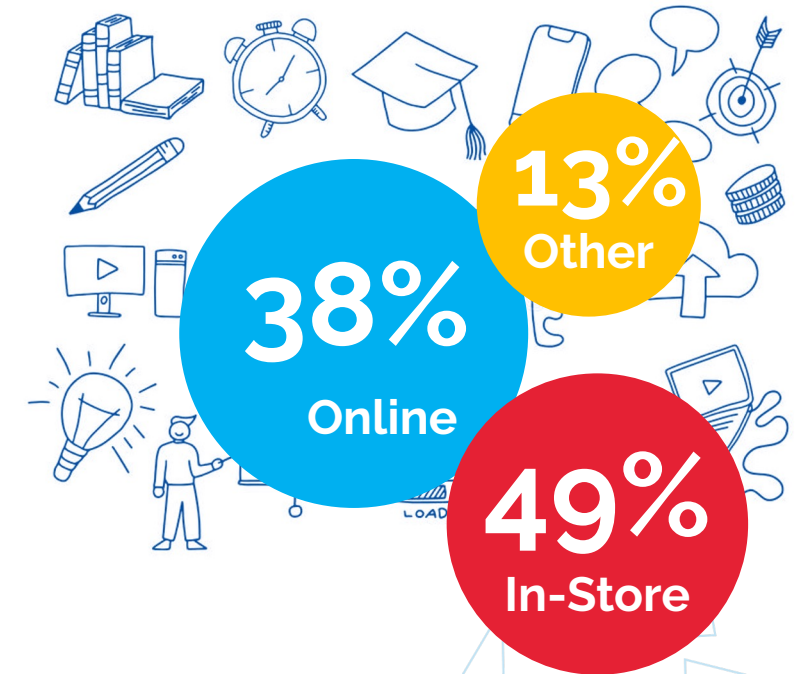
In the past 4 weeks, did you read newspaper inserts?



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



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



# CINEMA

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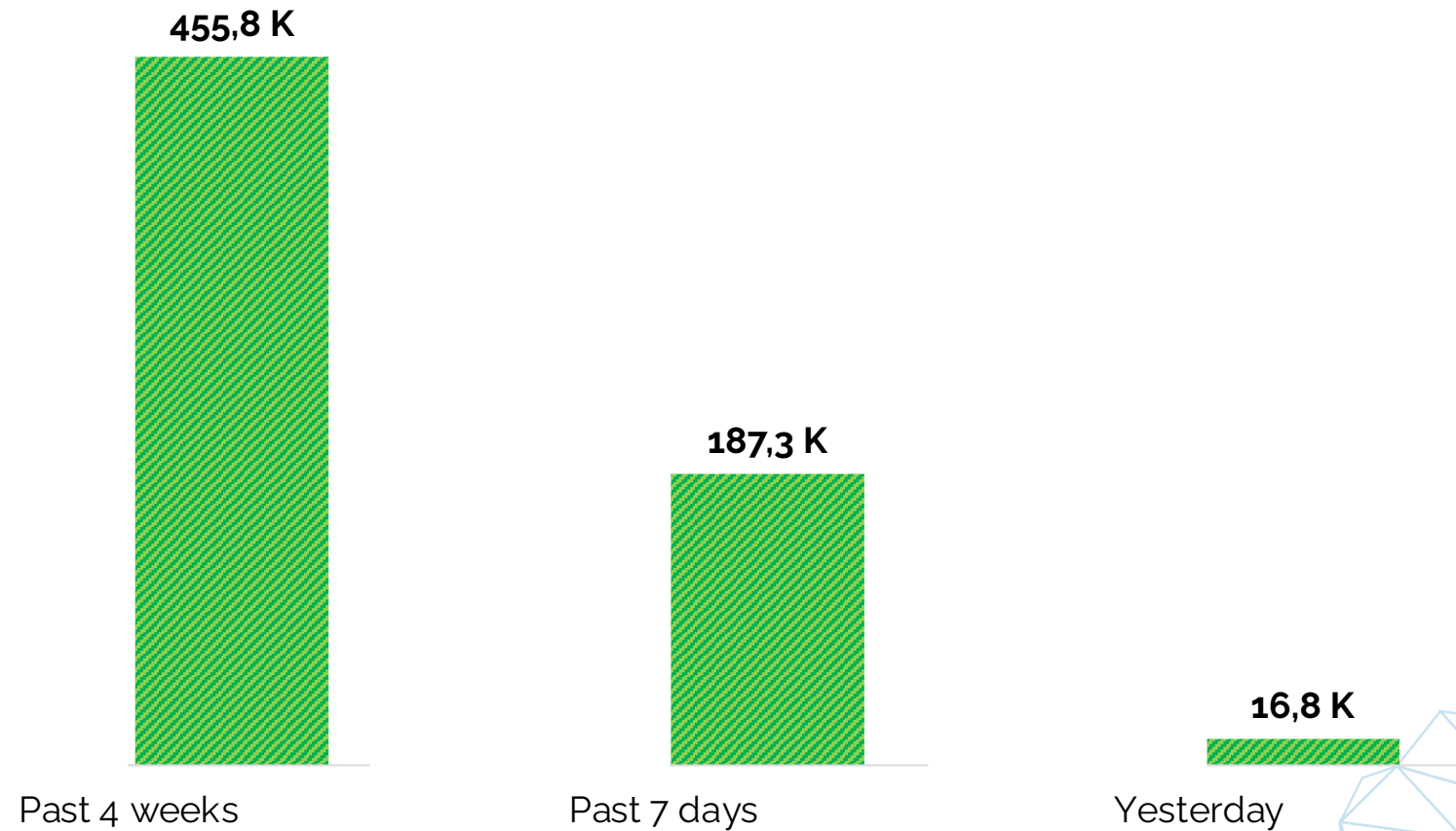




# Cinema Audience

## Cinema Audience [Yesterday, P7D, P4W]

Jan '21 - Dec '21



# Cinema Visits



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

3

2% respondents have gone out to the cinema in the past 6 months

132K

-182K

212K

-249K

221K

-382K

125K

-284K

166K

-178K

131K

-188K

**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:

**R414** for **3** people

**R40**

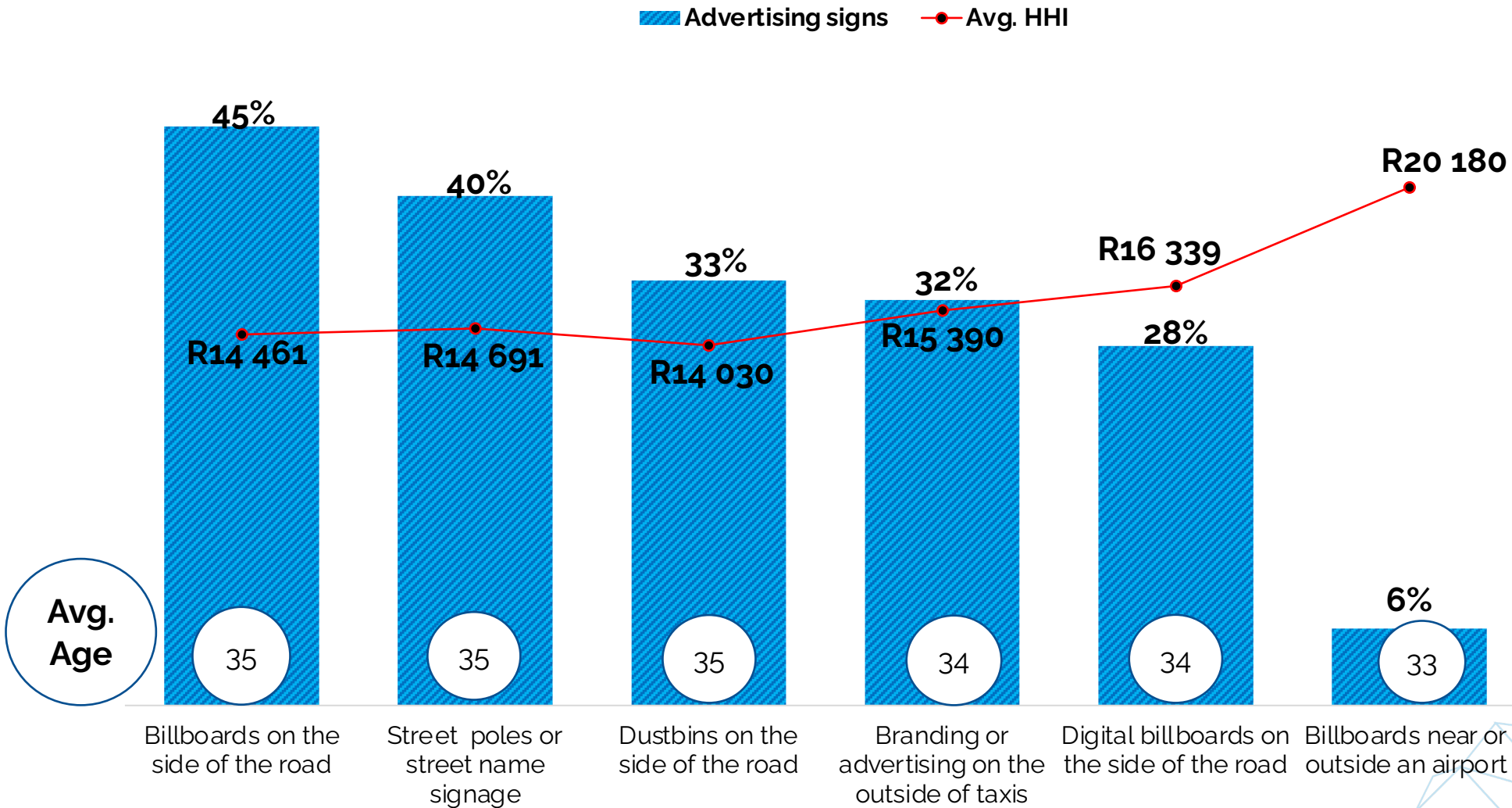
# OUT OF HOME

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# Most Viewed Advertising Signs

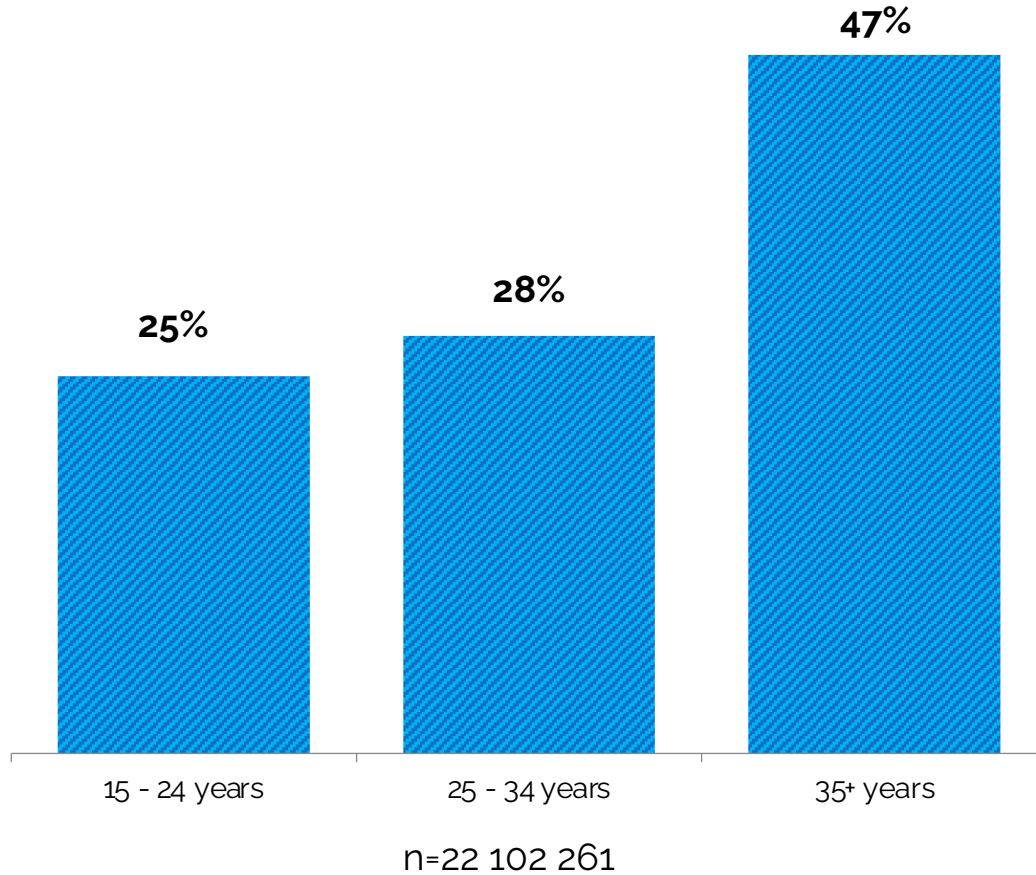
Past 4 weeks



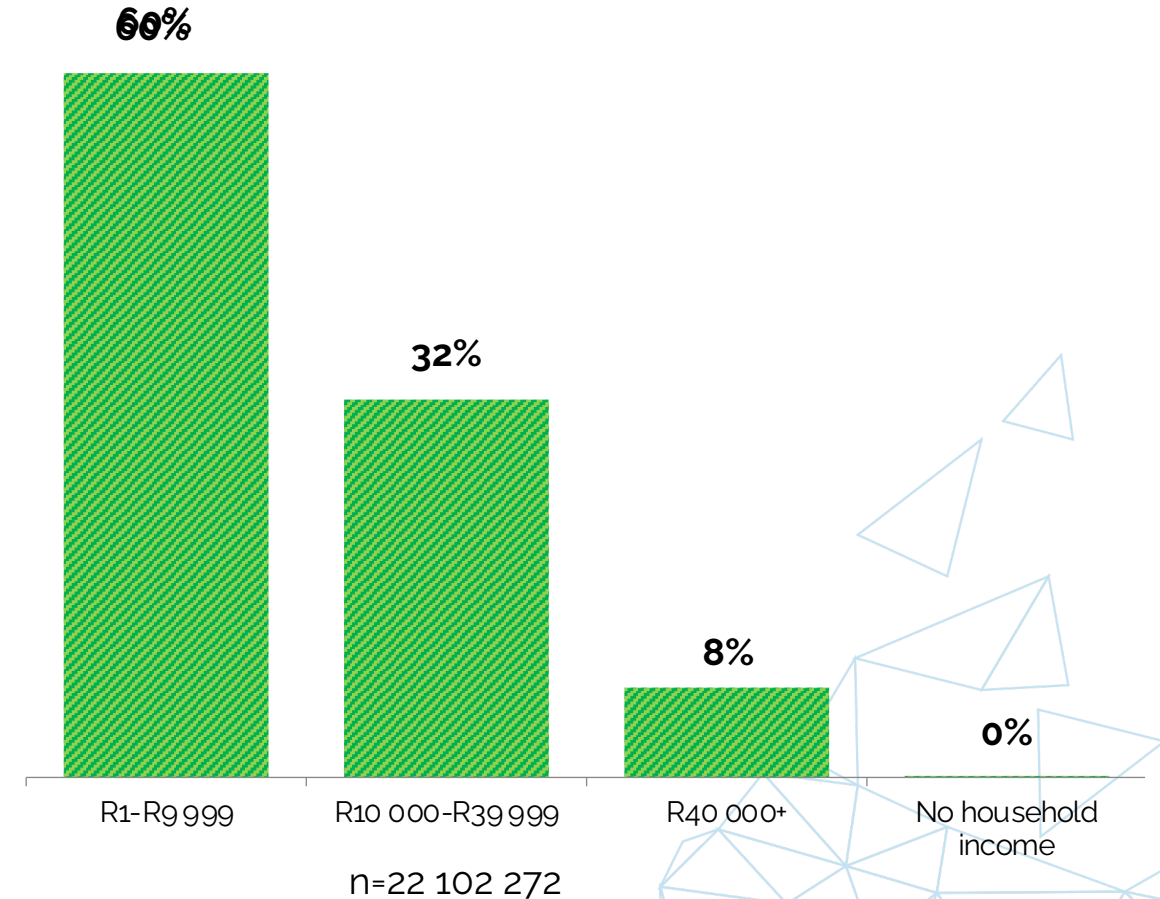
# Outdoor Media Consumption

Past 7 days

Outdoor Media Exposure by Age Group



Outdoor Media Exposure by HHI



# SOCIAL MEDIA

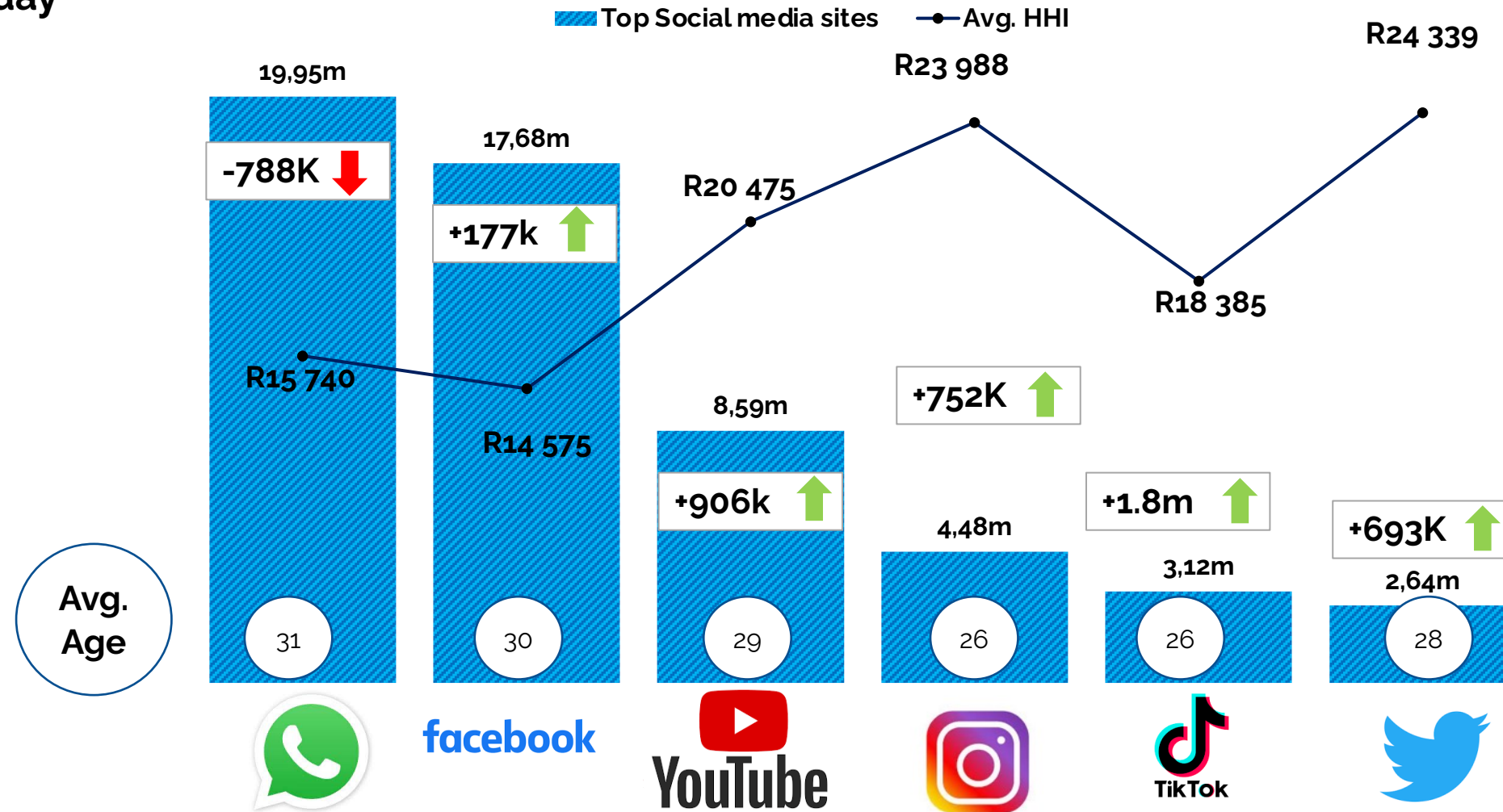
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# Top 5 Social Media Sites Visited

Yesterday



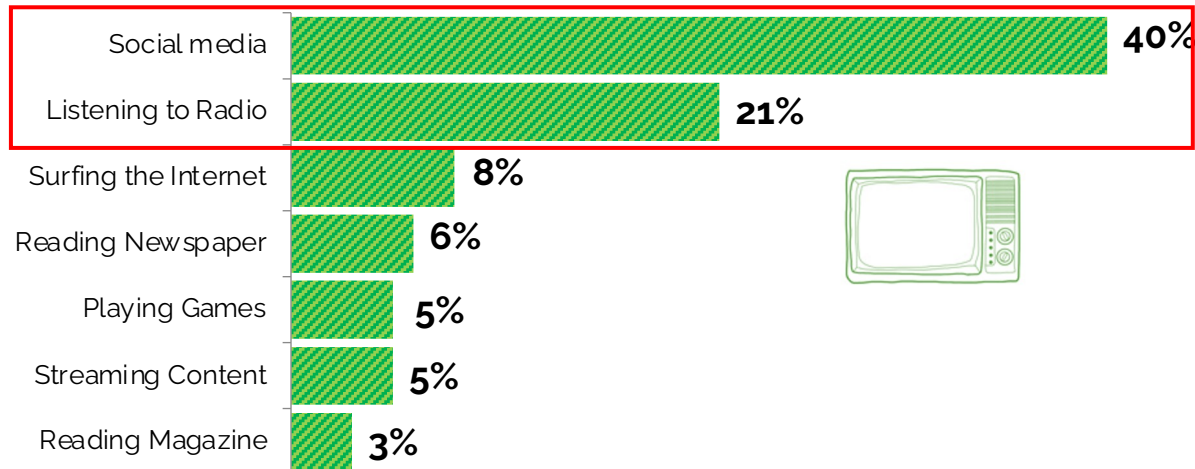
# MULTIPLATFORM BEHAVIOUR

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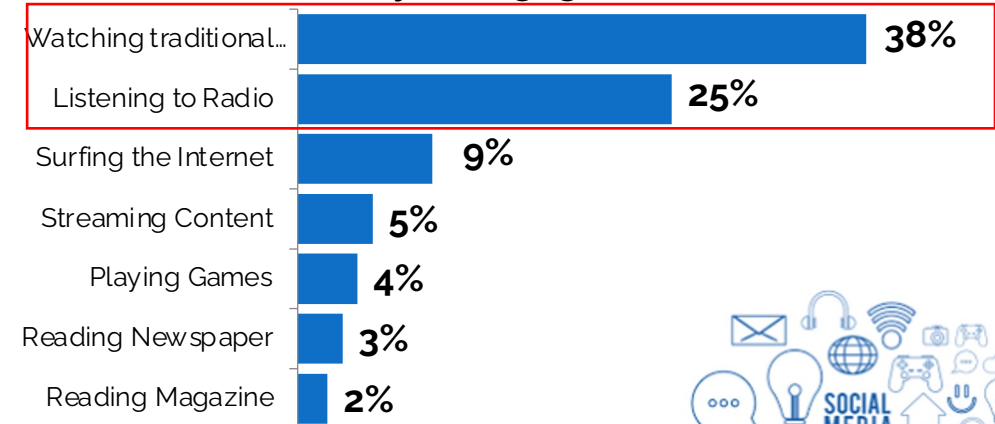


# Multiplatform Behaviour

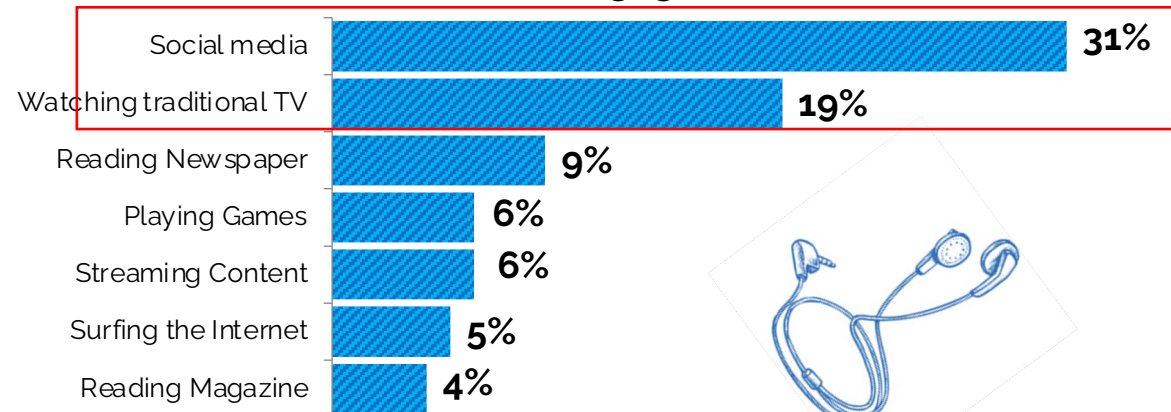
While watching live TV, which secondary activity do you engage in?



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

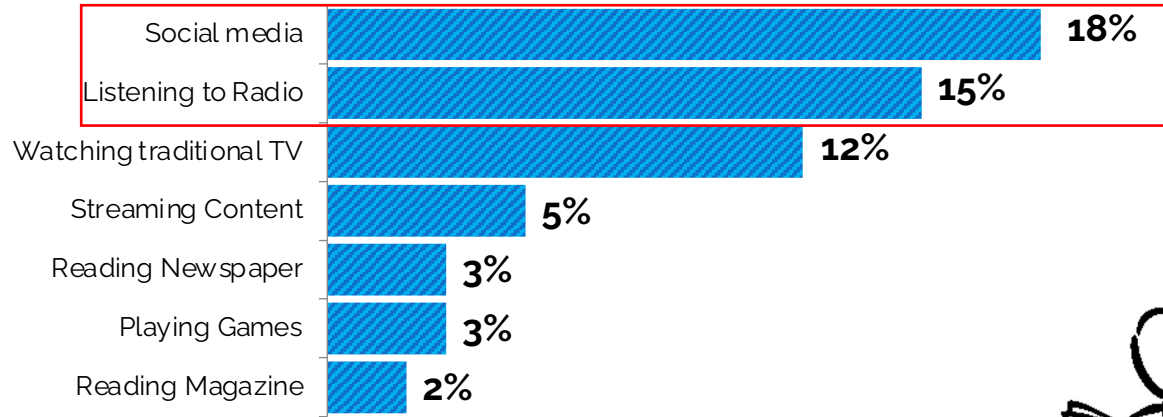


While listening to radio, which secondary activity do you engage in?

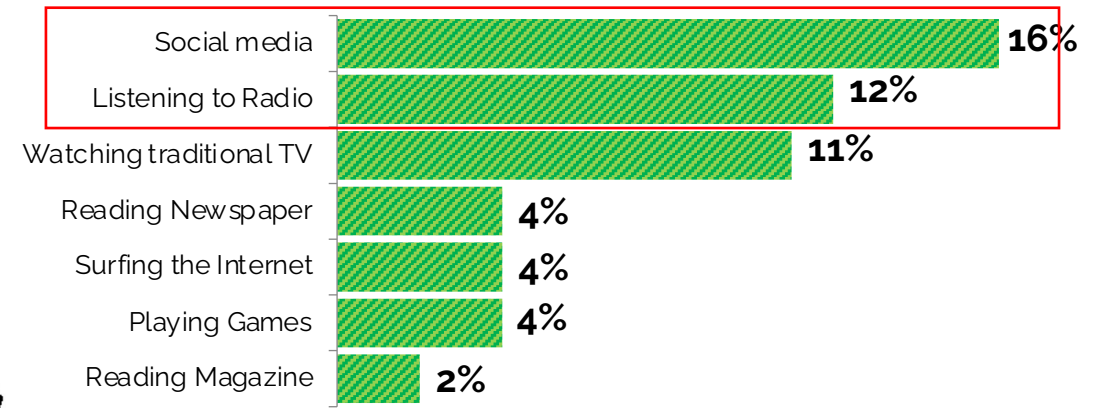


# Multiplatform Behaviour

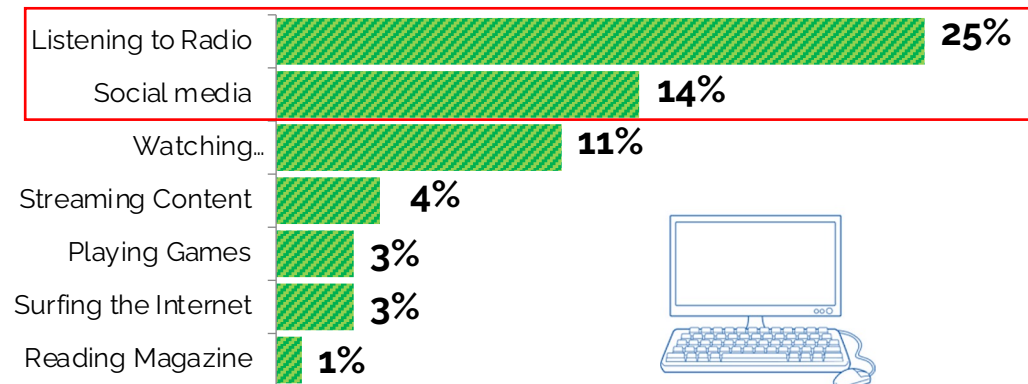
**While surfing the internet, which secondary activity do you engage in?**



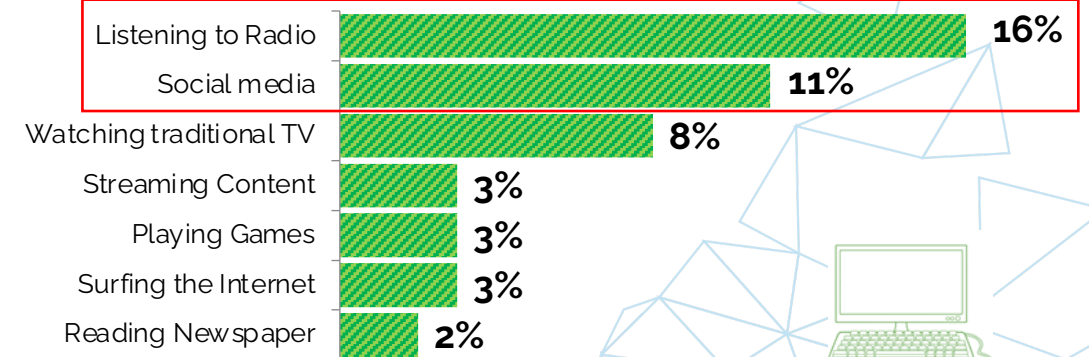
**While streaming content, which secondary activity do you engage in?**



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



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



# CELLPHONES

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# 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

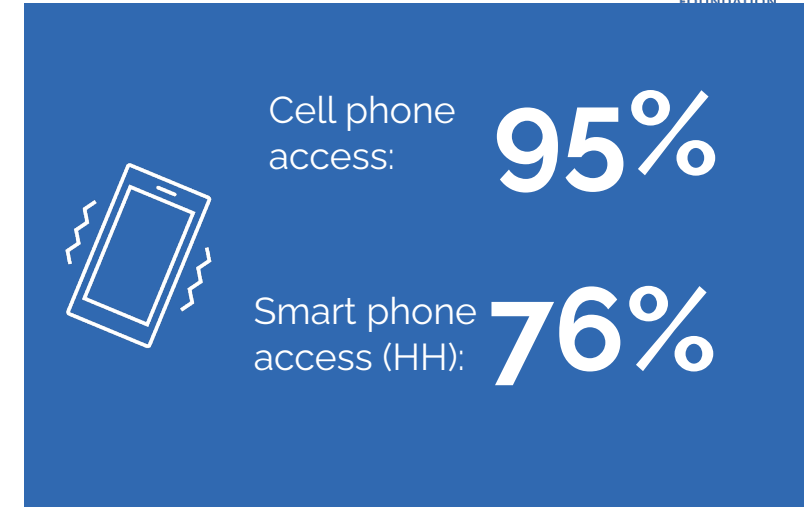
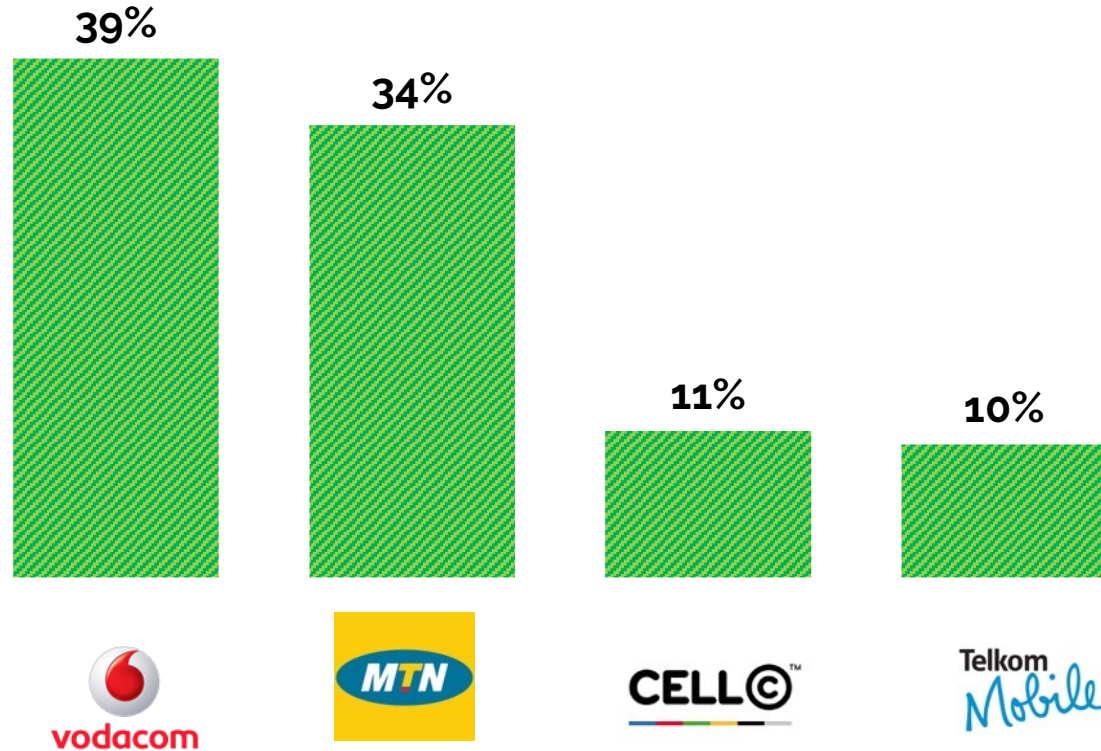
- Internet Access in the Home
- Interests, hobbies and activities
- Streaming

## 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



# Top 4 Cellular Networks



Average number of cell phones in household:

3.5

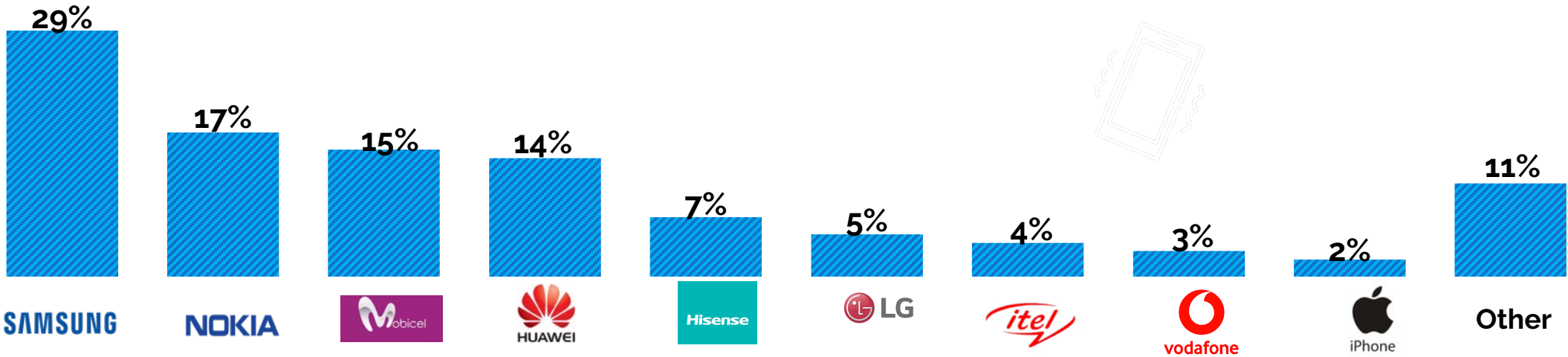


Average number of cell phones used by an individual:


1.1

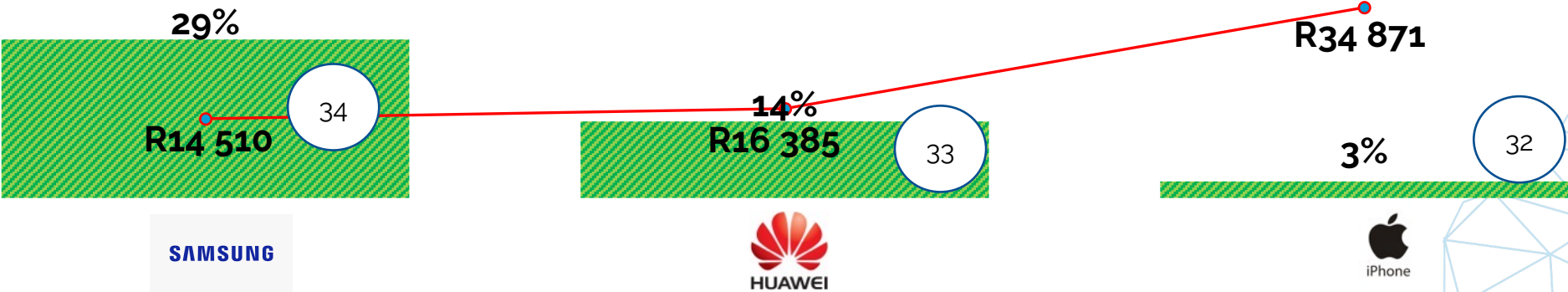
# Top Cellphone Brands Used

## Brands of Cellphones Used



## Samsung vs. Huawei vs iPhone Users

 Samsung vs. Huawei vs. iPhone Users
  Avg. HHI









Avg. Age

SAMSUNG



iPhone

# Phone brand vs. Network Preference

		Cellphone Brand				
		SAMSUNG	 mobicel	NOKIA	 HUAWEI	iPhone
Network provider	 vodacom	37%	38%	52%	33%	33%
	 MTN	34%	44%	38%	32%	24%
	 CELL <sup>©</sup>	16%	12%	7%	16%	13%
	 Telkom Mobile	16%	7%	5%	21%	33%
	Total Users	12.4mil	6.5mil	7.2mil	5.9mil	1.2mil

Note: \*Percentages not adding up to 100% due to some respondents using more than one of each brand

# FINANCIAL SERVICES

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# 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

## Stokvels

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

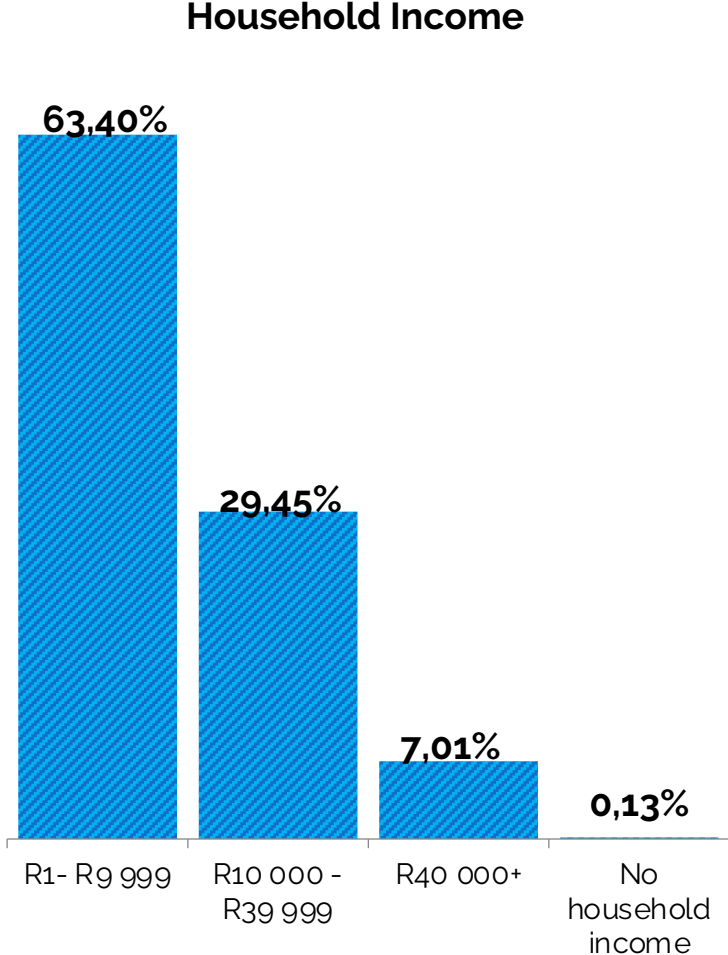
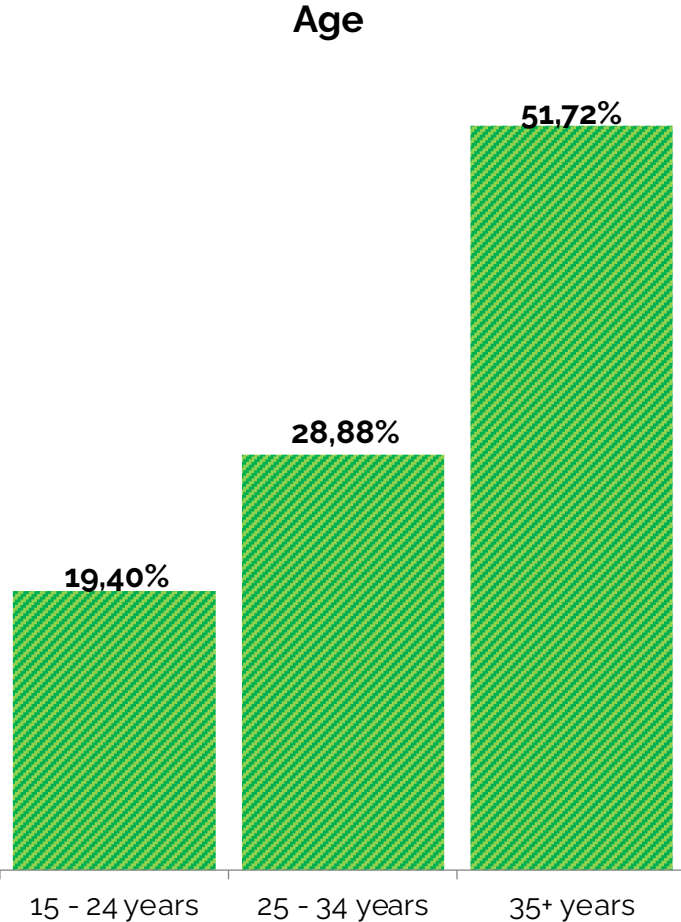
## Financial Services

- 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

## SASSA Government Grants

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

# Banked Population



## Banked Population

- Excluding SASSA grants

**68.3%** ↑

- Including SASSA grants

**78.3%** ↓

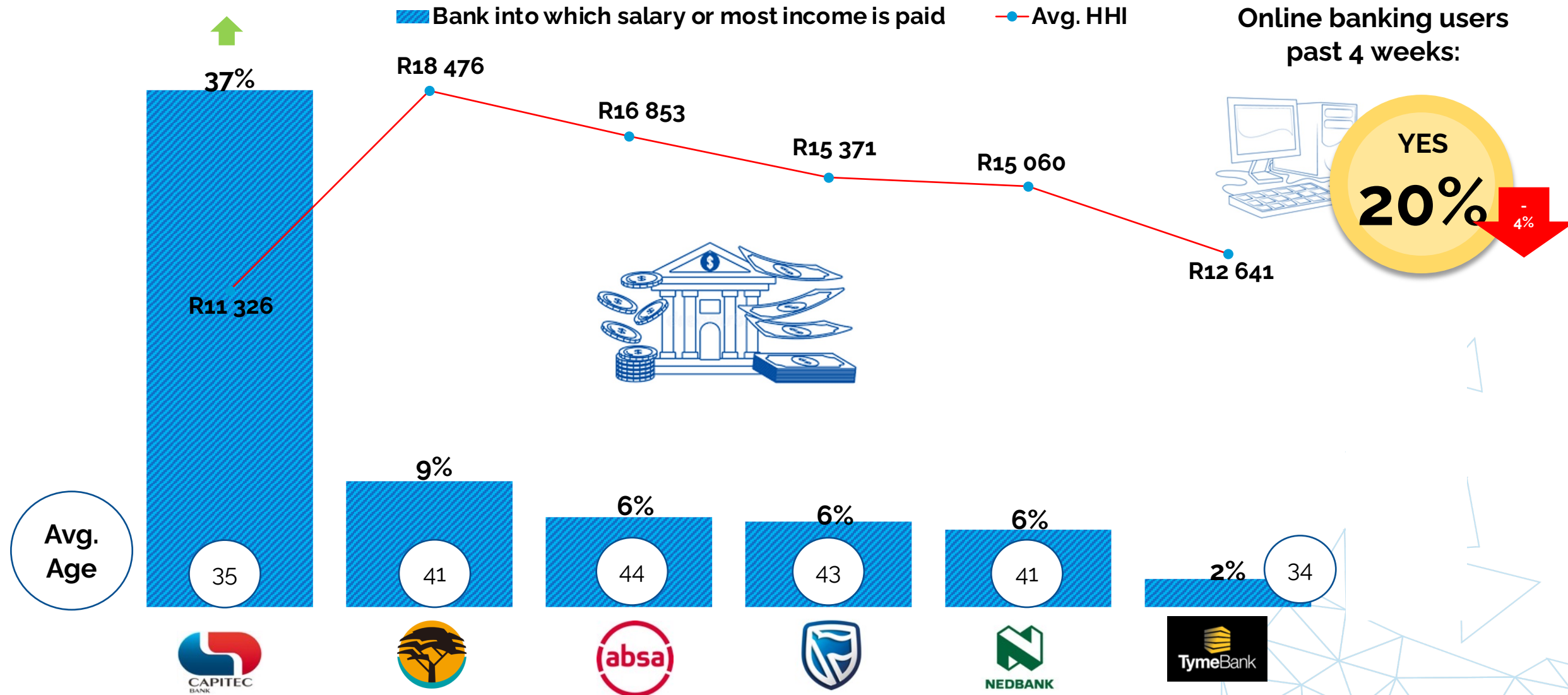


Note: Percentages may not add up to 100% due to rounding off

Source: MAPS 2021 (January '21 – December '21)

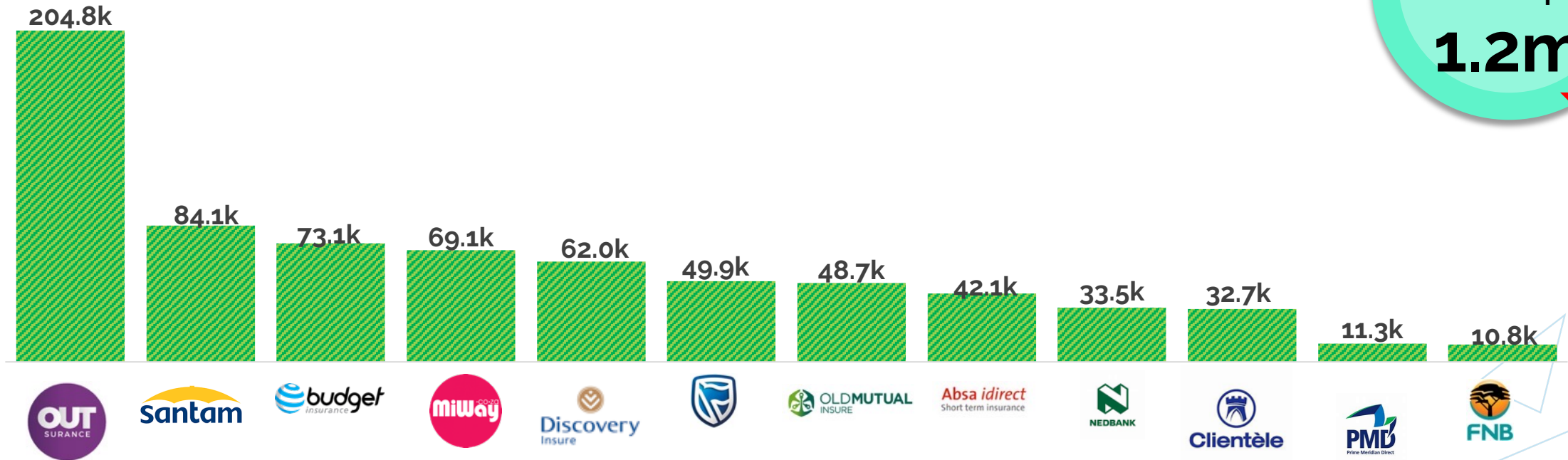


# Top Primary Banks Used



# Short-Term Insurance: Top Providers

## Short-term insurance providers



Short Term  
Insurance penetration  
into Pop  
**1.2m**  
- 500K

# Stokvel Participation

Do you belong to a Stokvel?



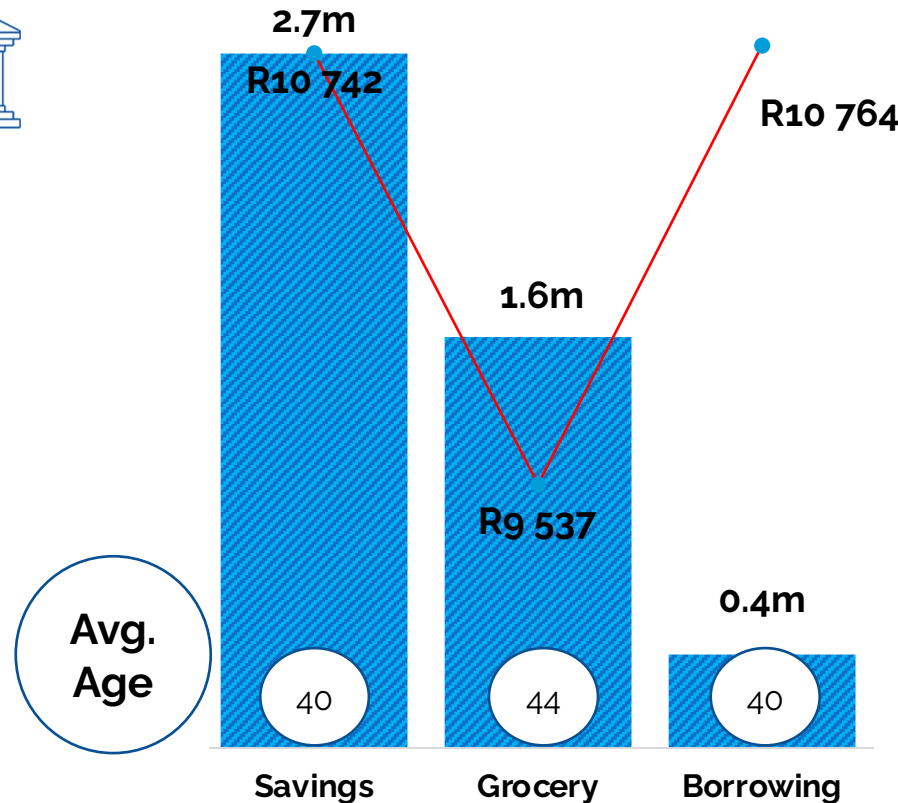
Average contribution per month

**R766**

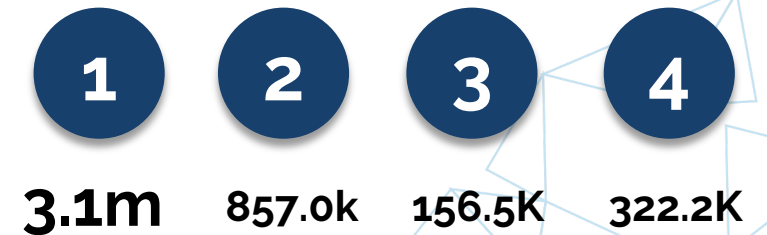
**R62**

Most common type of stokvel

■ Type of stokvel ● Avg. HHI









How many stokvels do you belong to?








Jan '21 – Dec '21 vs. Jul '20 – June '21

# Access to Financial Services

Financial Services	Average Age	Average Monthly HH Income	Population size	October '21 Pop Size
 Loyalty/rewards retail store cards	39	R13 679	19.7mil	19.1mil
 Funeral insurance	45	R11 580	17.4mil	17.9mil
 SASSA government grant	44	R6 880	16.1mil	12.8mil
 Money transfer service	36	R14 459	7.1mil	9.0mil
 Retail store cards for credit purchase	37	R15 009	6.6mil	8.6mil
 Medical aid schemes	41	R31 443	3.5mil	4.2mil

# Access to Financial Services Cont.

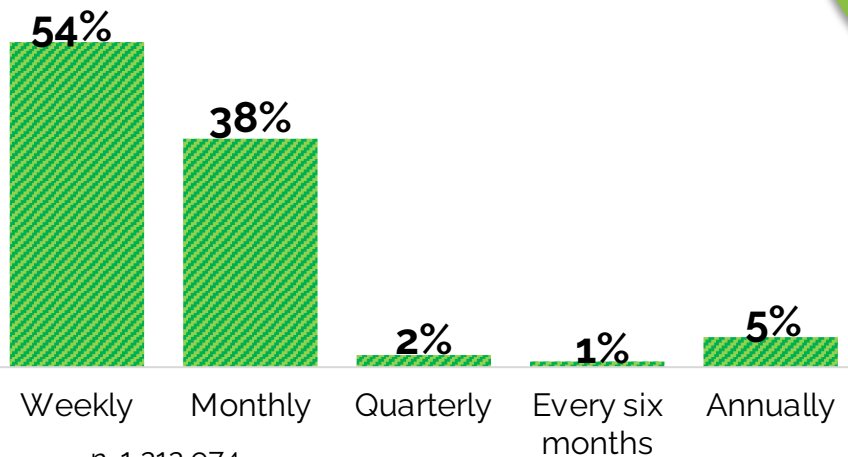
Financial Services	Average Age	Average Monthly Household Income	Population size	October '21 Pop Size
 Credit purchase on durable items e.g., furniture, household appliances (past 12 months)	38	R16 756	3.5mil	3.4mil
 Life insurance	43	R24 362	2.4mil	3.5mil
 Personal loans (past 12 months)	41	R18 818	1.1mil	1.5mil
 Investment in unit trusts	39	R33 639	749.8k	961k
 Investment in the stock exchange	35	R27 730	781.8k	1.0mil

# Behaviour: Saving and Personal loans

Do you invest or save money?



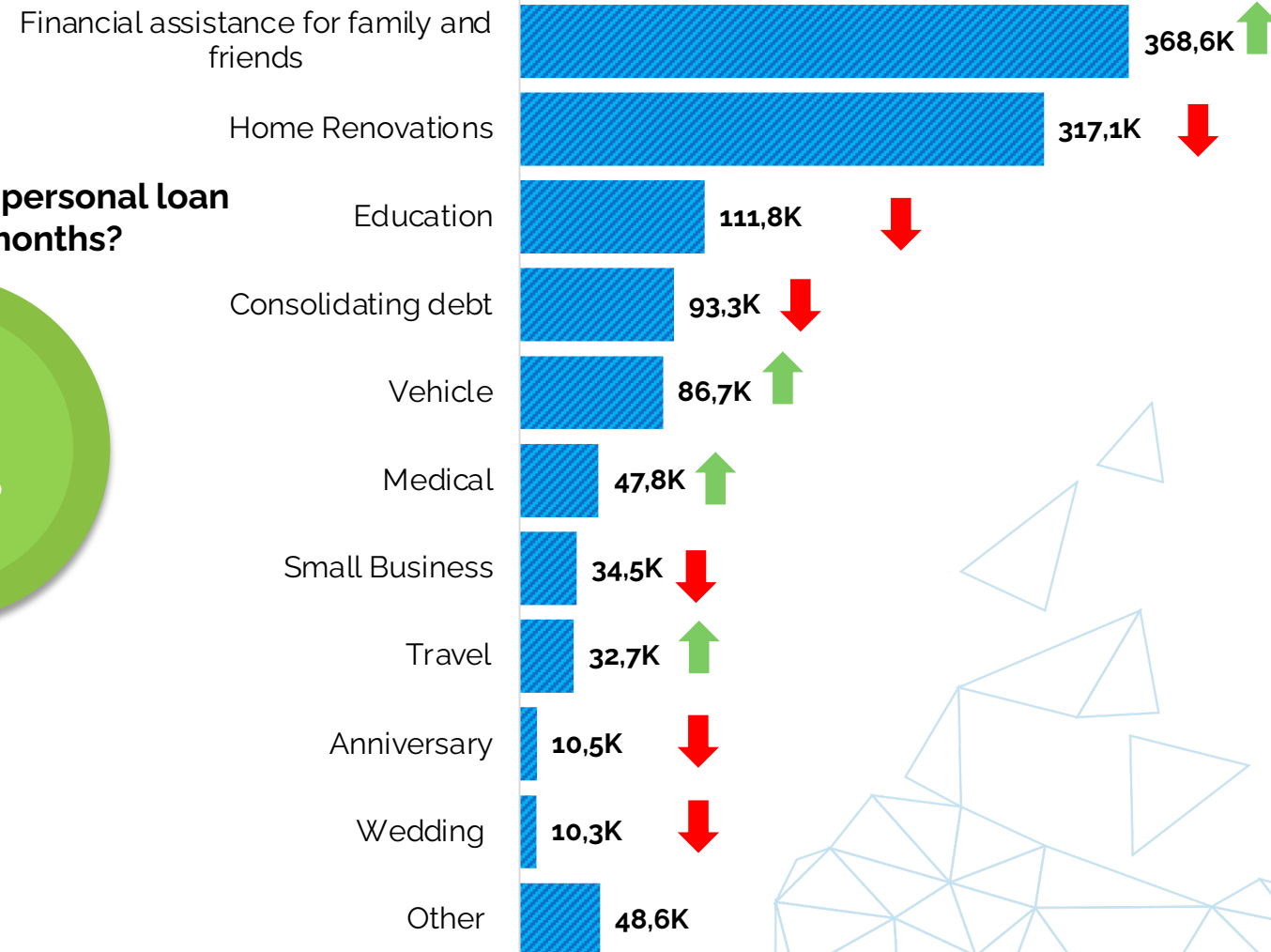
How often do you invest or save?



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



Purpose for loan (past 12 months)



Jan '21 – Dec '21 vs. Jul '20 – June '21

Source: MAPS 2021 (January '21 – December '21)

Population 15+: 43 099 774 96



# AUTOMOTIVE

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# 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.

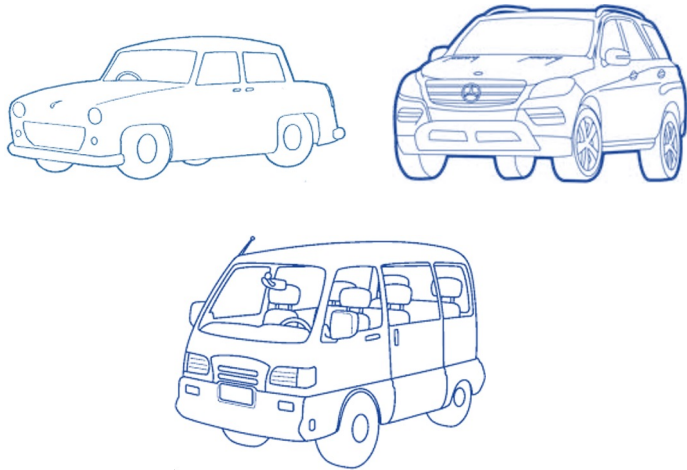
## Automotive Driving Behaviour

- 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

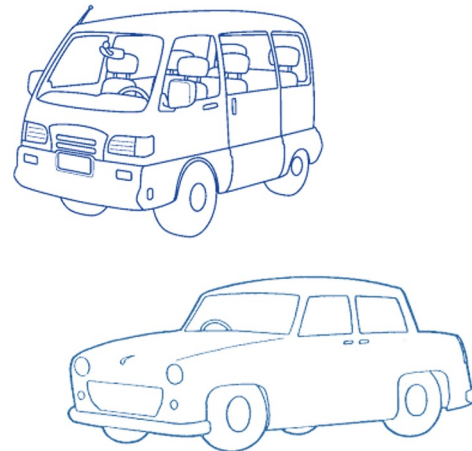
**4%**

Owens 3 or more cars



**7%**

Owens 2 cars



**20%**

Own 1 car



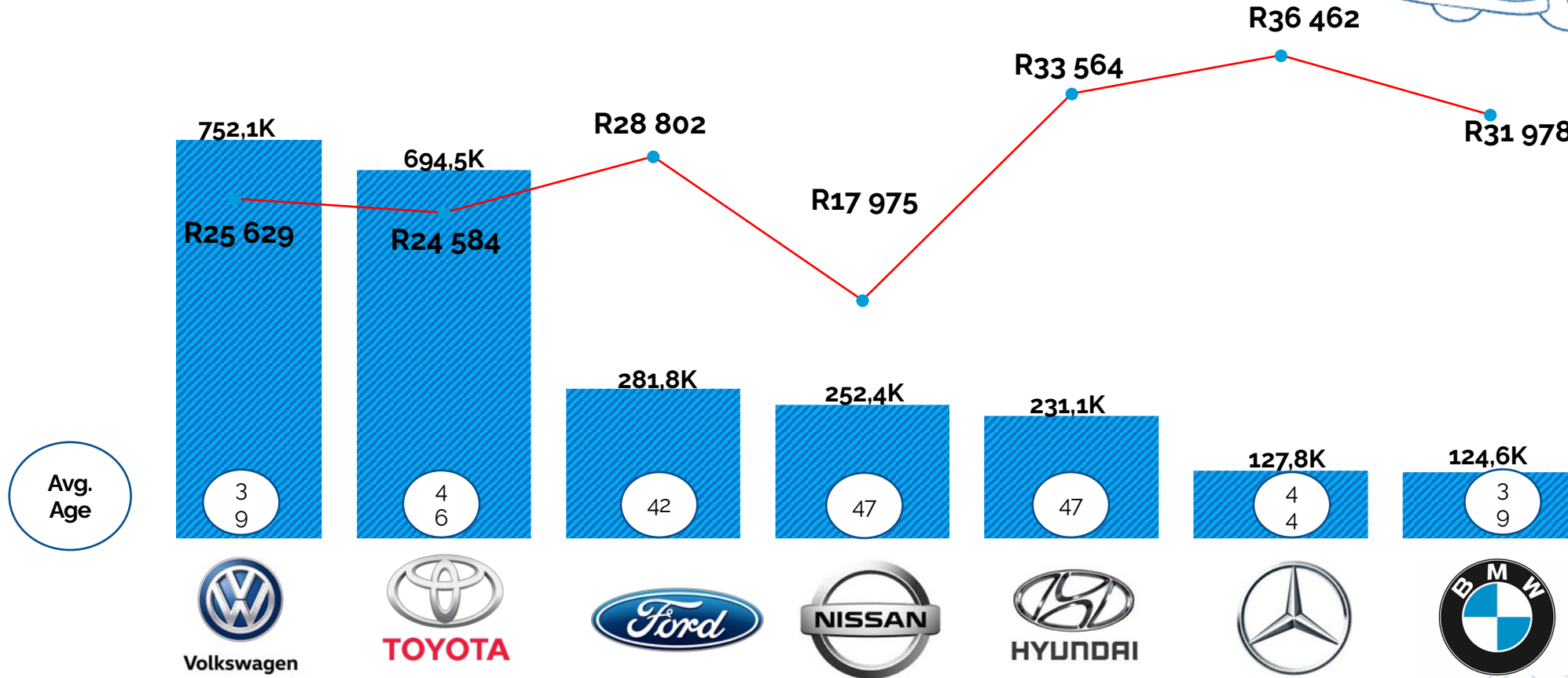
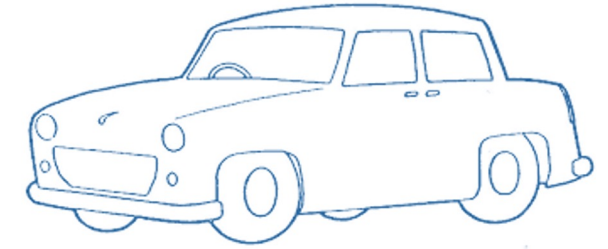
**30%** of households have motor vehicles

SA Household Population: **17,164 million households**

# Top Car Brands Driven

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

■ Make of vehicle —●— Avg. HHI



# RETAIL

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# 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

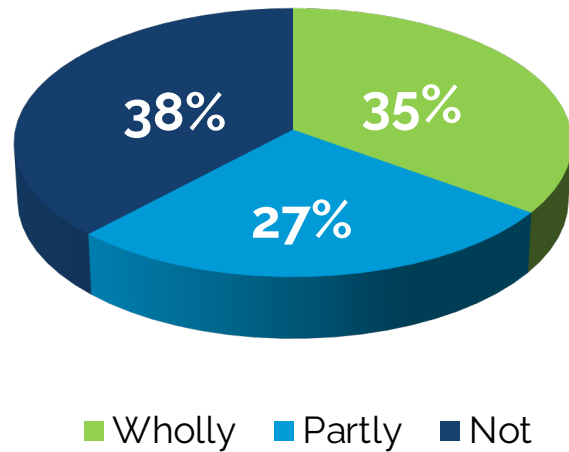
## Fast Food Purchasing Behaviour

- 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



# Household Purchase Behaviour

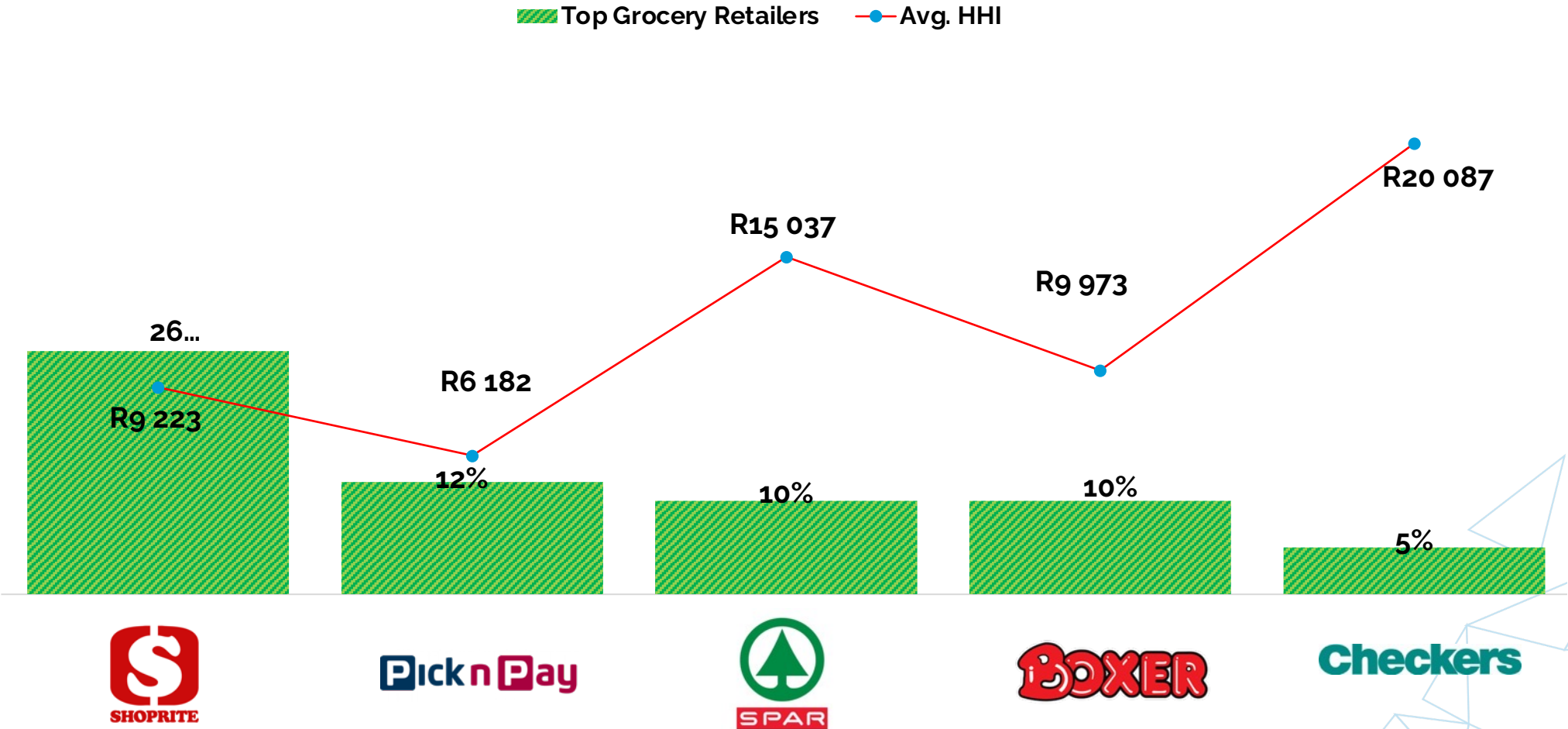
## Purchase Responsibility



## Frequency of Purchase

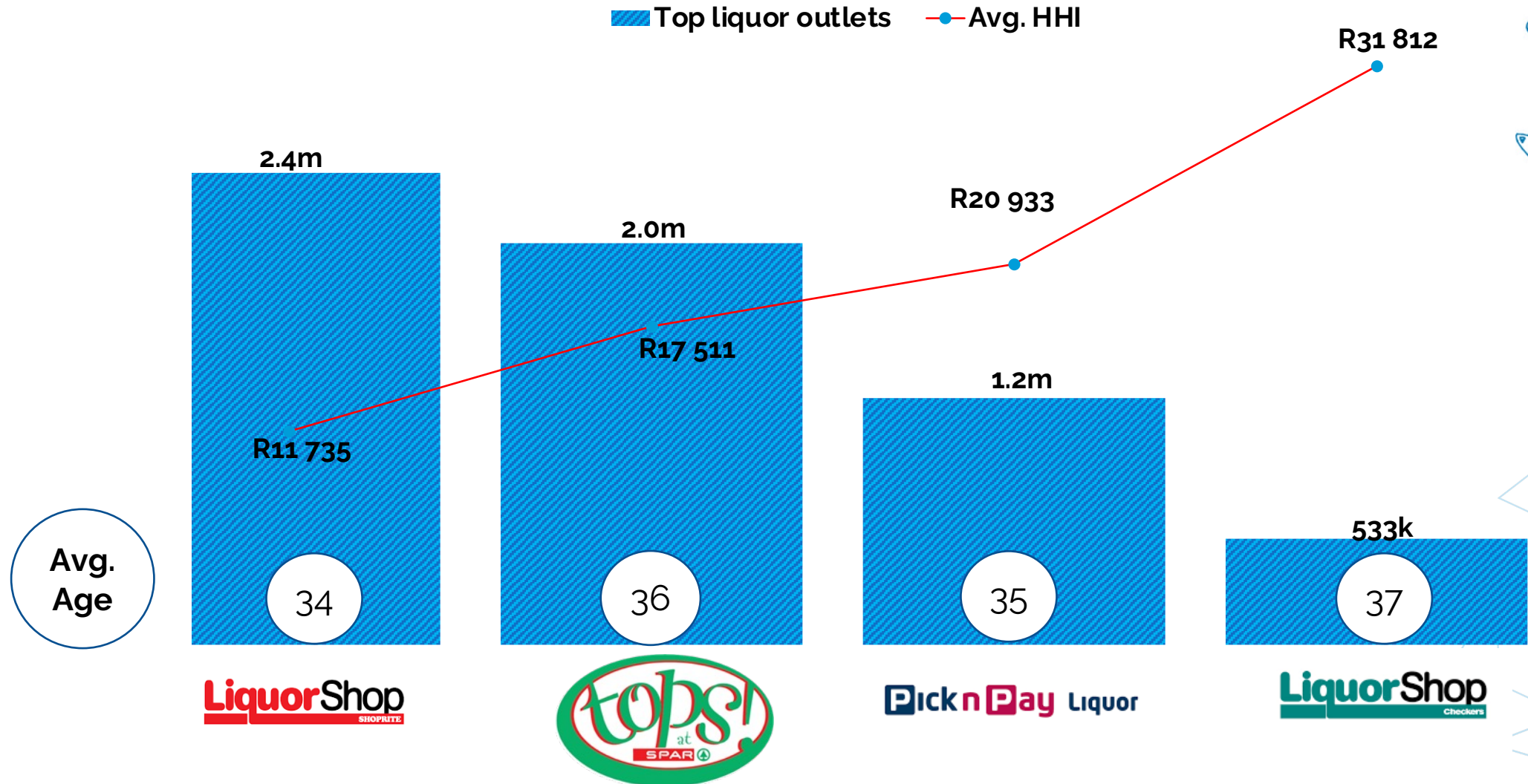


# Top Grocery Retailers



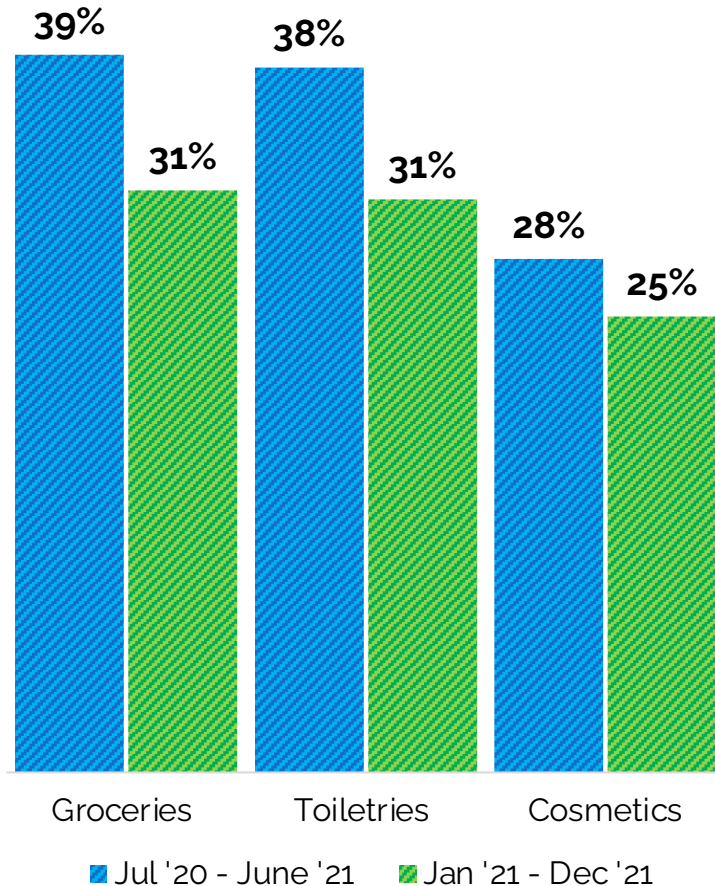
# Top Liquor Stores

Past 4 weeks

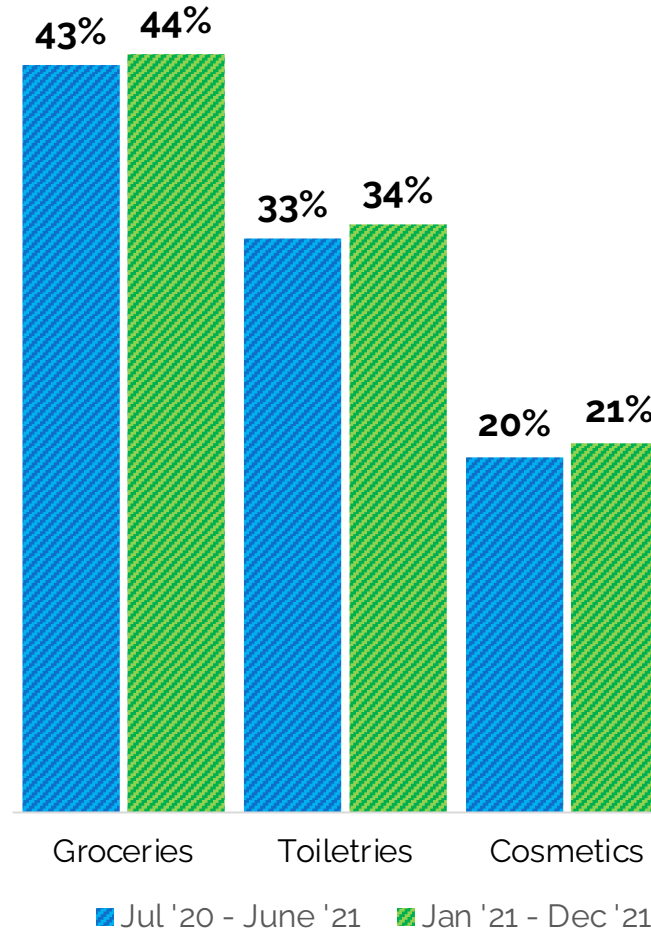


# Brand Loyalty

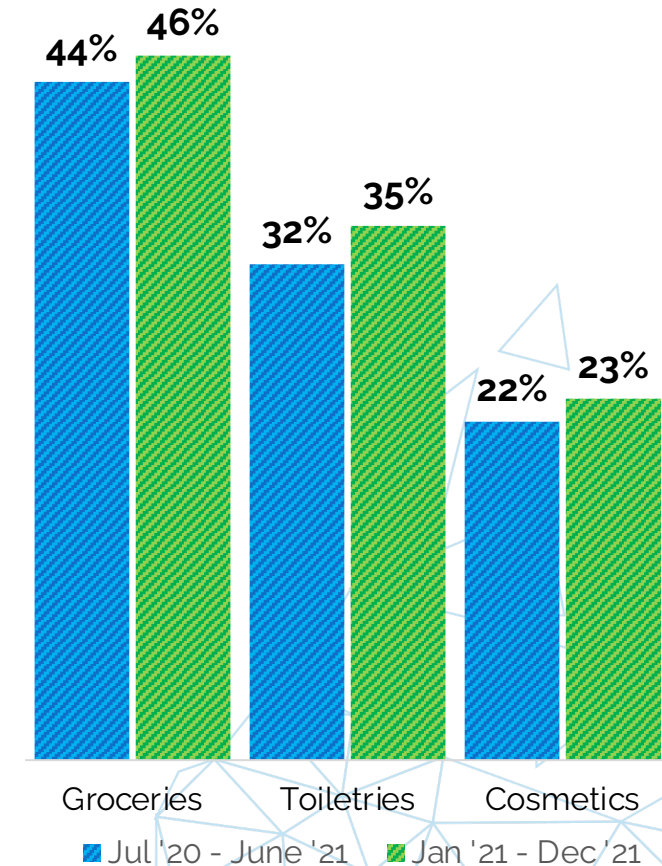
Do you always buy the same brands?



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



Would you buy another brand because it costs less than the brand you usually buy?



# CLOTHING AND SHOES

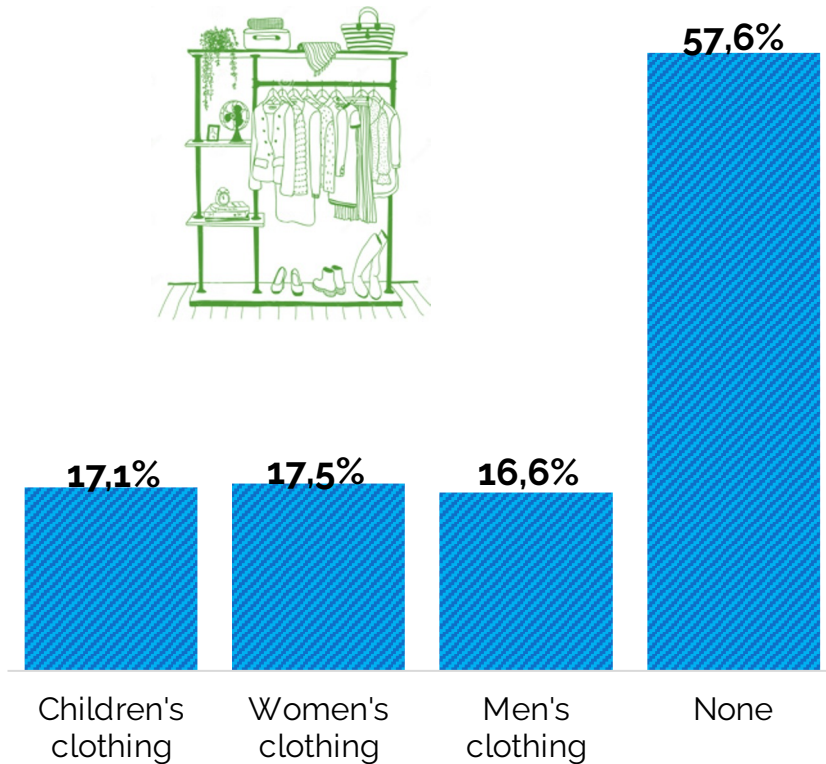
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# Clothing Purchases

Past 3 months

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



ACKERMANS

  
**Mr Price**

  
**Mr Price**

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





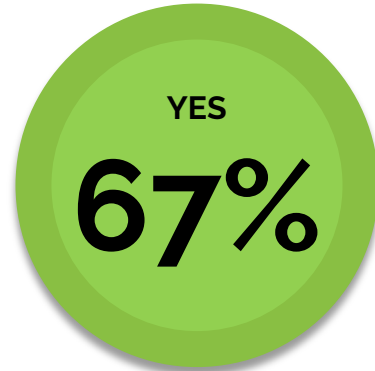
# COSMETICS

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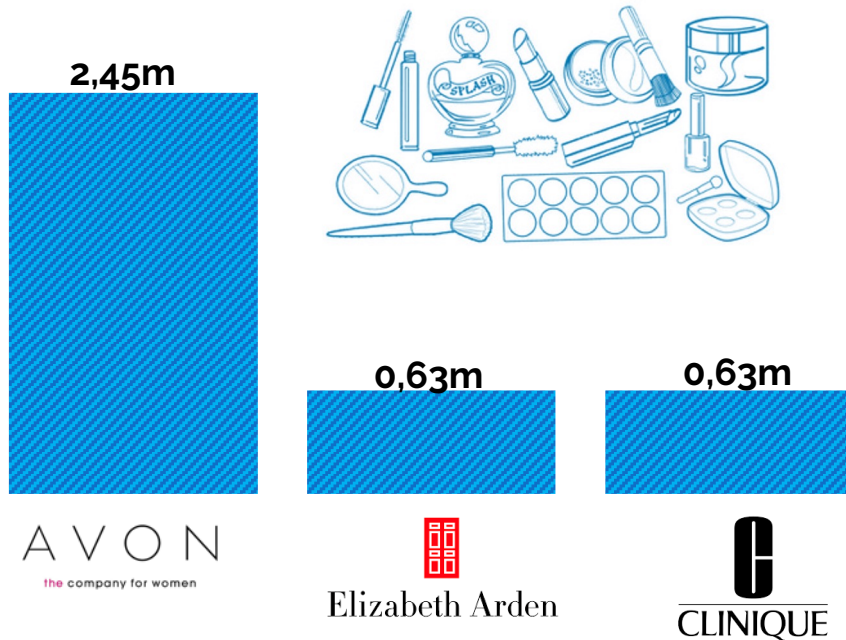


# Cosmetics Purchases

Do you ever purchase cosmetics (make-up, skincare products, perfumes/colognes)?

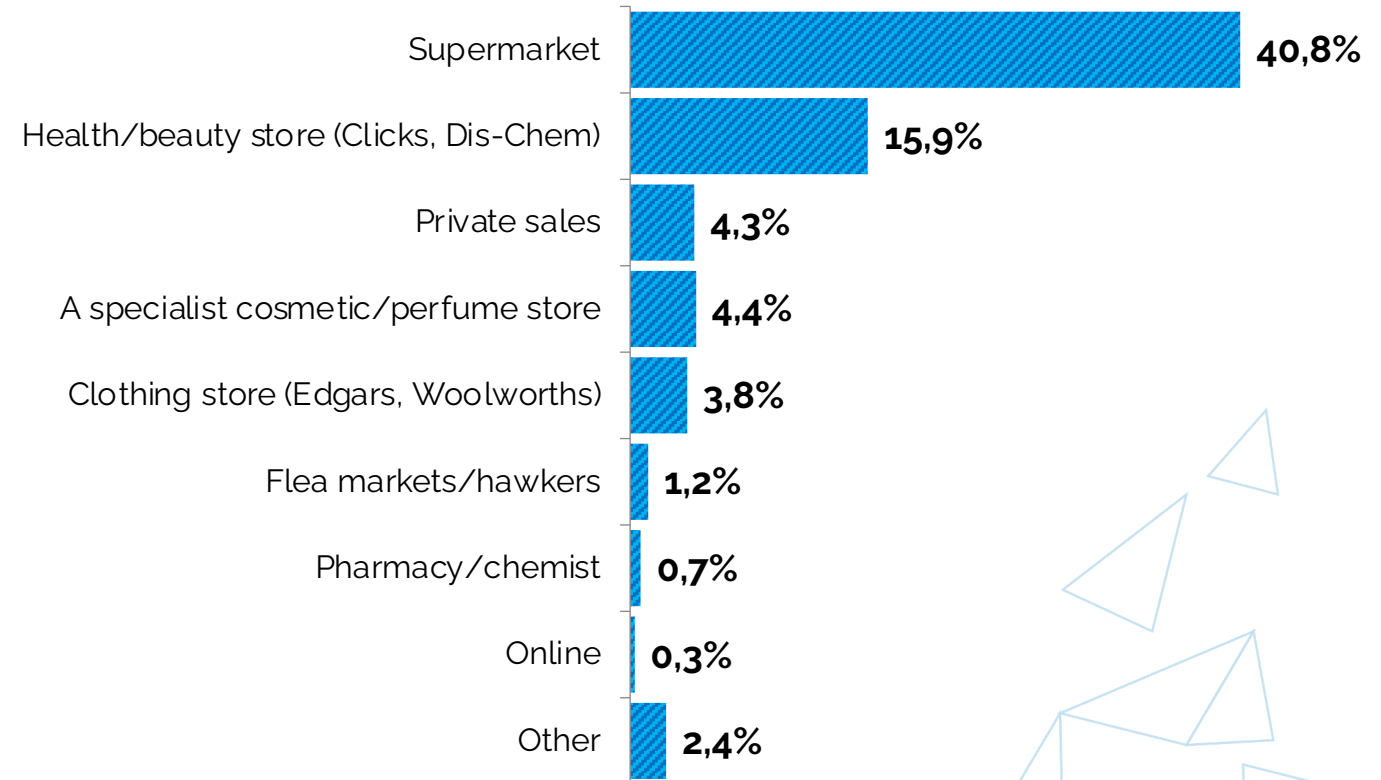


Colour cosmetics: Top 3 brands purchased past 4 weeks



Colour cosmetics refer to products such as base, blusher, lipstick, eyeshadow, mascara etc.)

Where do you usually buy cosmetic products (make-up, skincare products and perfumes/colognes)?



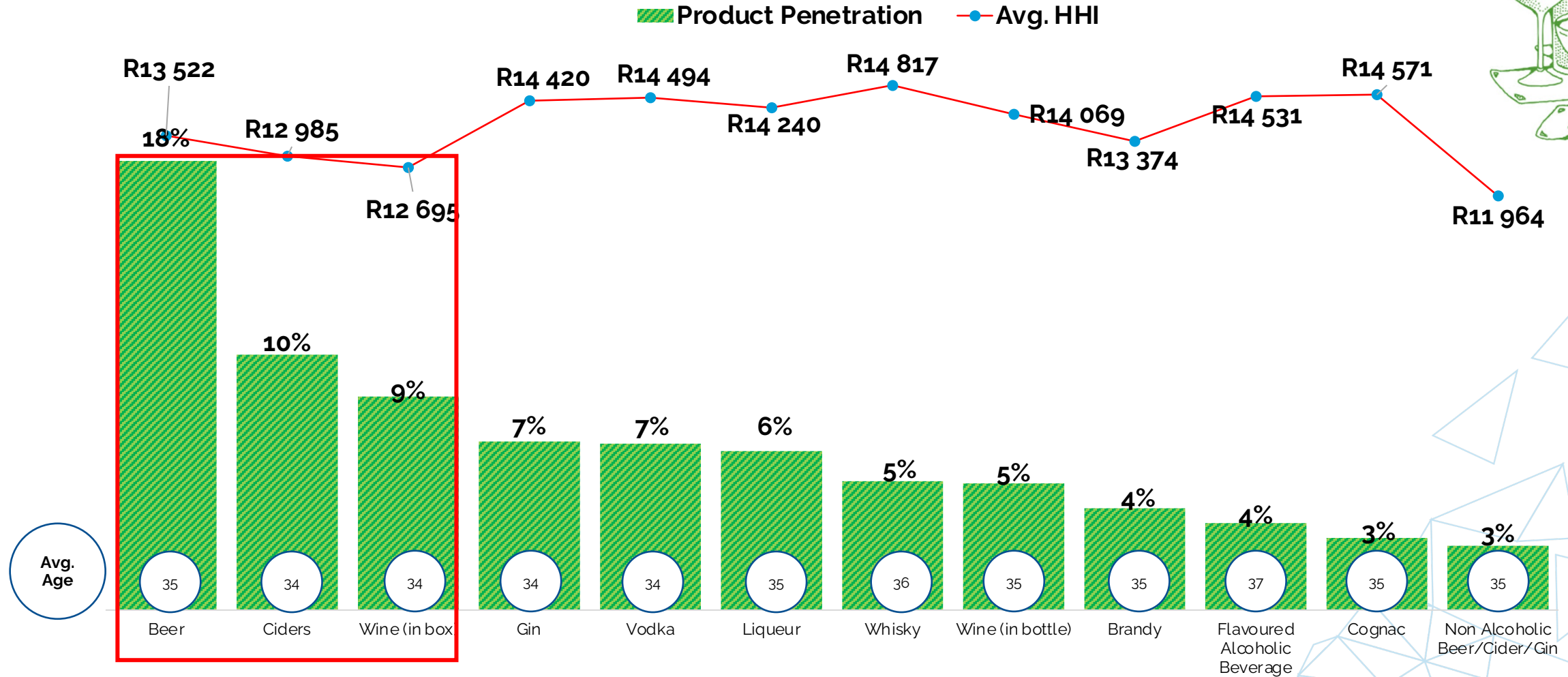
# ALCOHOL PENETRATION

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# Alcohol Penetration

Past 7 days



Products chosen at random

# MALLS

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# Top Malls Visited

## Top Malls Per Province in the Past 4 Weeks



### Gauteng

1. East Rand Mall
2. Maponya Mall
3. Southgate Mall

### KwaZulu-Natal

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

### Western Cape

1. Liberty Promenade
2. Canal Walk
3. Khayelitsha Mall

### Mpumalanga

1. Riverside Mall
2. Tonga Mall

### Eastern Cape

1. BT Ngebs Mall
2. Greenacres Shopping Centre

### Free State

1. Twin City
2. Mimosa Mall

### 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



# FAST FOOD

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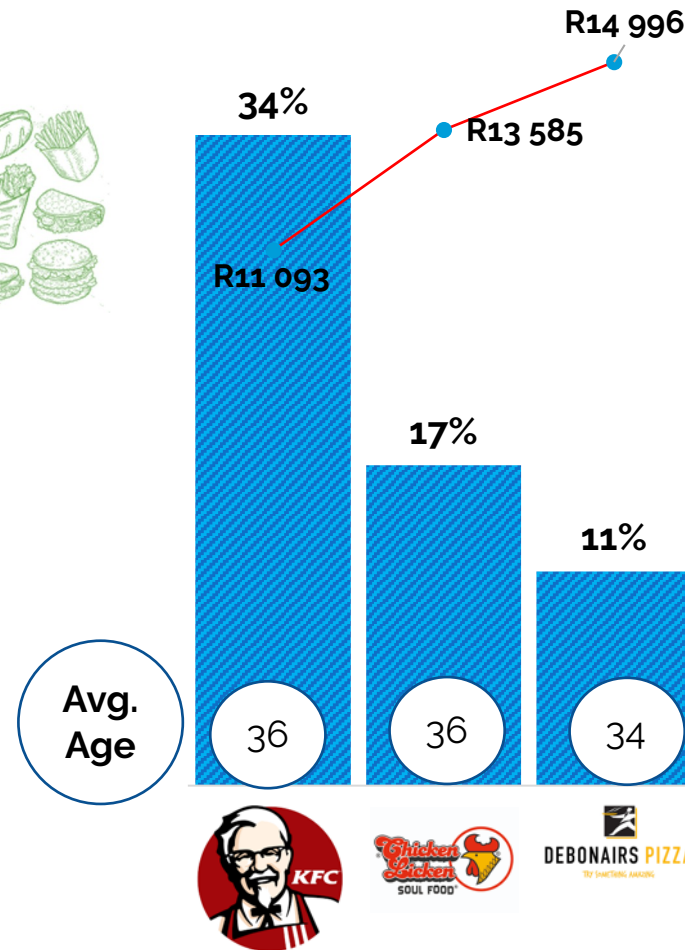
# Behaviour: Fast food

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

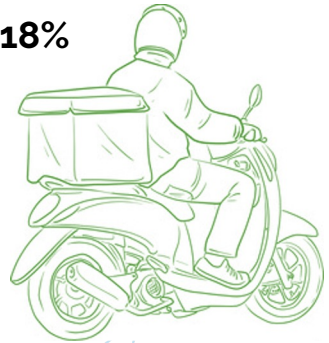
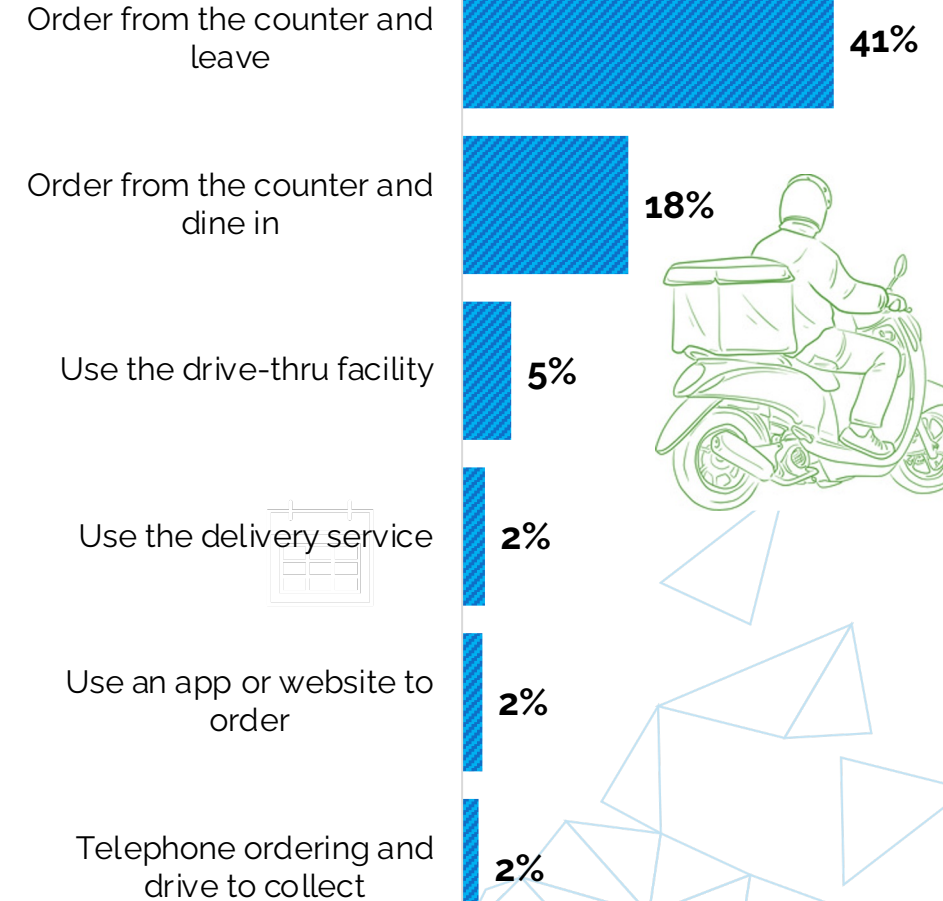
At least once a month  
**57%**



Fast food outlet purchased from:  
Past 4 weeks



How do you purchase take-aways?



# **MEDIA STRETCH ANALYSIS**

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In development

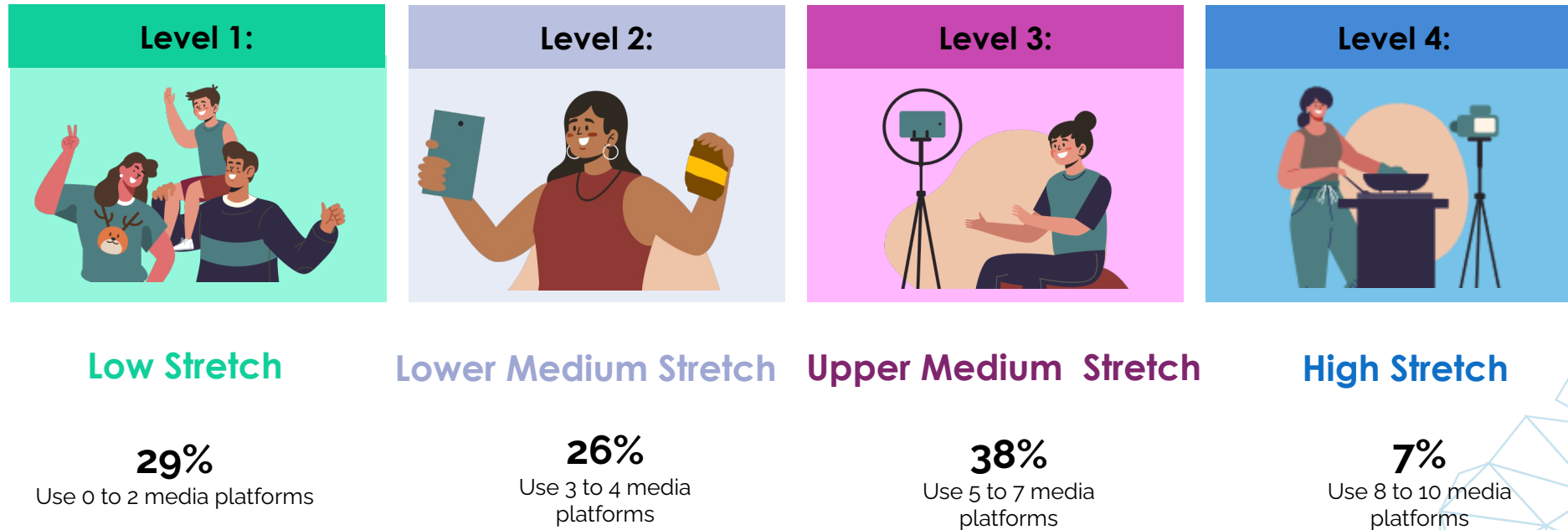


# Media Stretch Categories











Cluster analysis makes it easy for marketers to target customers, instead of having one general marketing approach. To help analyse media data, clusters based on the intensity of media usage were created.

Usage of the following media platforms was considered in order to cluster the population: Social Media, Cinema, Magazines, Store Magazines, Newspapers, Streaming, Radio, Television, Internet and Out of Home advertising.

**Five stretch levels were identified, namely:**



# Media Usage per Stretch Category

		MEDIA STRETCH CATEGORY			
		Low Stretch	Lower Medium Stretch	Upper Medium Stretch	High Stretch
MEDIA PLATFORM	 Social Media	2%	37%	93%	100%
	 Cinema	0%	0%	1%	6%
	 Newspaper	7%	34%	50%	97%
	 Magazine	1%	4%	11%	69%
	 Store magazine	4%	14%	19%	73%
	 Internet	2%	39%	95%	100%
	 Television	54%	74%	84%	96%
	 Radio	49%	69%	83%	98%
	 Streaming	0%	18%	73%	98%
	 Out of Home	20%	58%	80%	97%

# Media Stretch Category Drivers

Once the media stretch clusters were established, multinomial logistic regression analysis was used to determine the drivers of the media stretch segments. A number of variables were explored. The list below shows variables that had a significant impact.

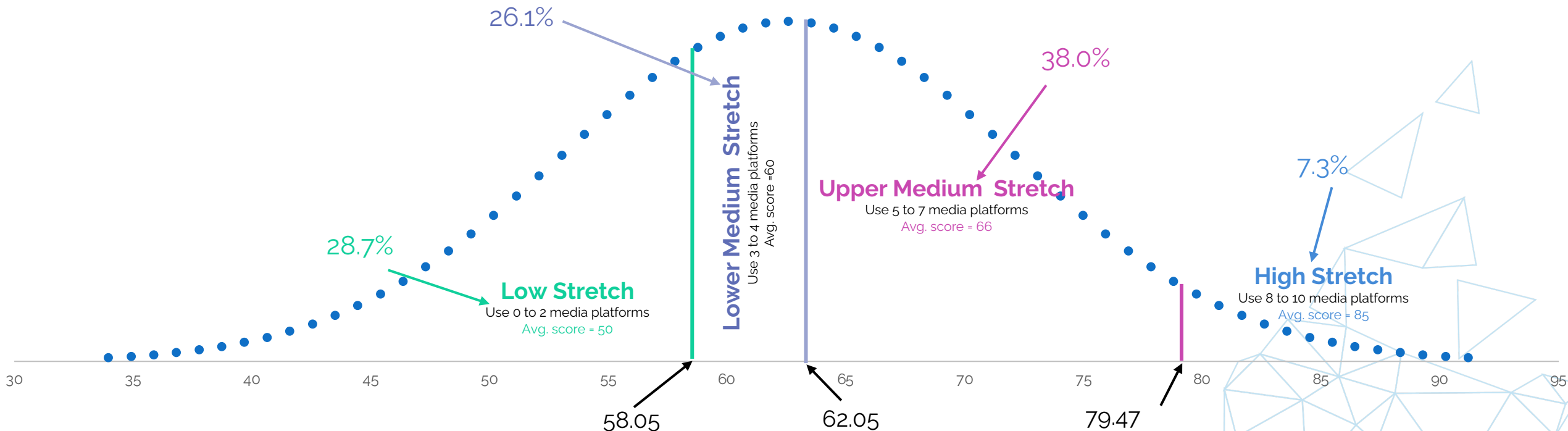
	High Impact Drivers	Moderate Impact Drivers	Low Impact Drivers
Attributes	<ul style="list-style-type: none"><li>• Education   +ve for higher levels</li><li>• Smart TV   +ve for have</li><li>• Age   +ve low ages</li><li>• Smartphone   +ve for have</li><li>• Aircon   +ve for have</li></ul>	<ul style="list-style-type: none"><li>• Radio   +ve for have</li><li>• Coffee Machine   +ve for have</li><li>• TV   +ve for have</li><li>• Urban / Rural   +ve for Urban</li><li>• Home internet   +ve for have</li><li>• DVD player   +ve for have</li><li>• Banked   +ve for banked</li><li>• Home Theatre   +ve for have</li><li>• Tablet   +ve for have</li><li>• Medical aid   +ve for have</li></ul>	<ul style="list-style-type: none"><li>• Hi-fi music center   +ve for have</li><li>• Washing Machine   +ve for have</li><li>• Gas stove   +ve for have</li><li>• Combined fridge   +ve for have</li><li>• Microwave   +ve for have</li></ul>



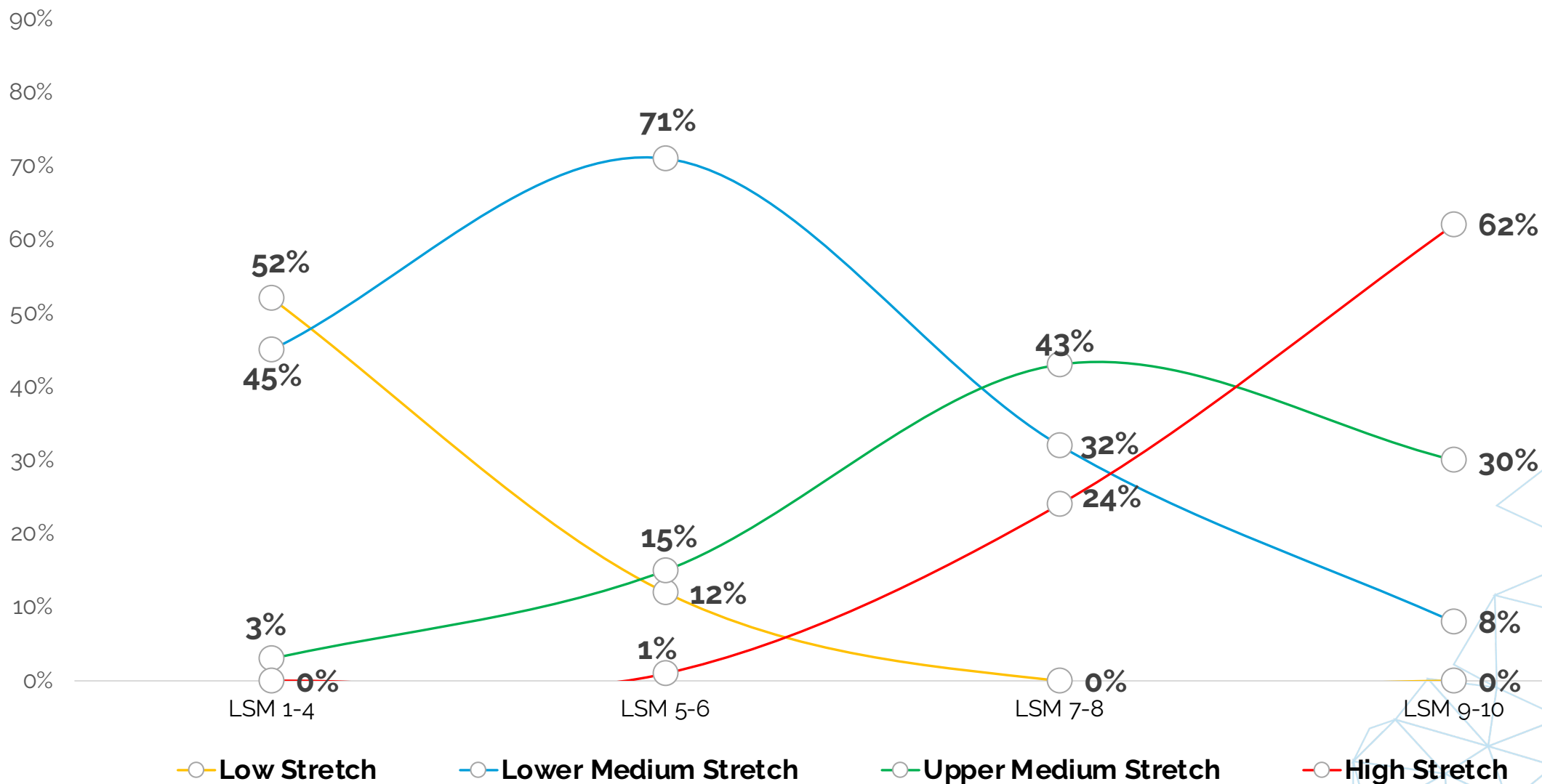
# Media Stretch Levels

Using the drivers of media stretch and their contribution levels as coefficients, a stretch score (out of 100) was generated for each respondent. Respondents were then clustered into different media levels. Cut off scores were determined so as to classify respondents into clusters of sizes similar to the ones obtained using the number of media platforms used. The resultant segments based on the stretch scores were then used to conduct the analysis in the rest of this presentation.

Media Stretch Score Distribution Curve



# Media Stretch Composition for LSM Levels



NB: Percentages may not add up to 100% due to rounding

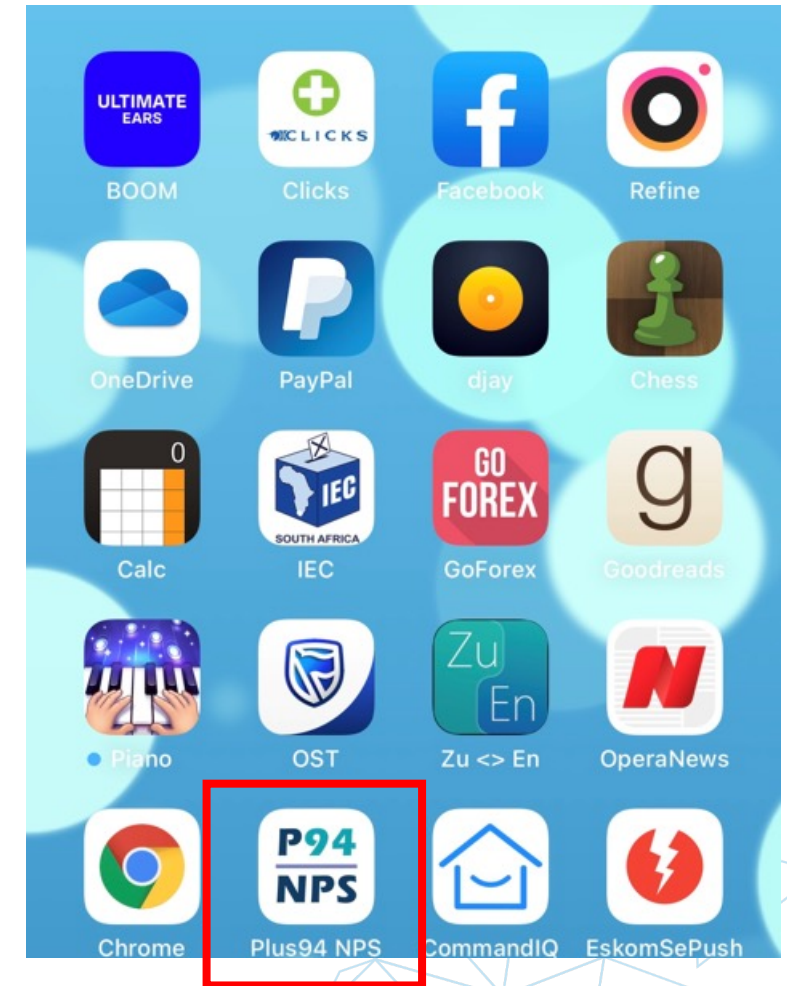
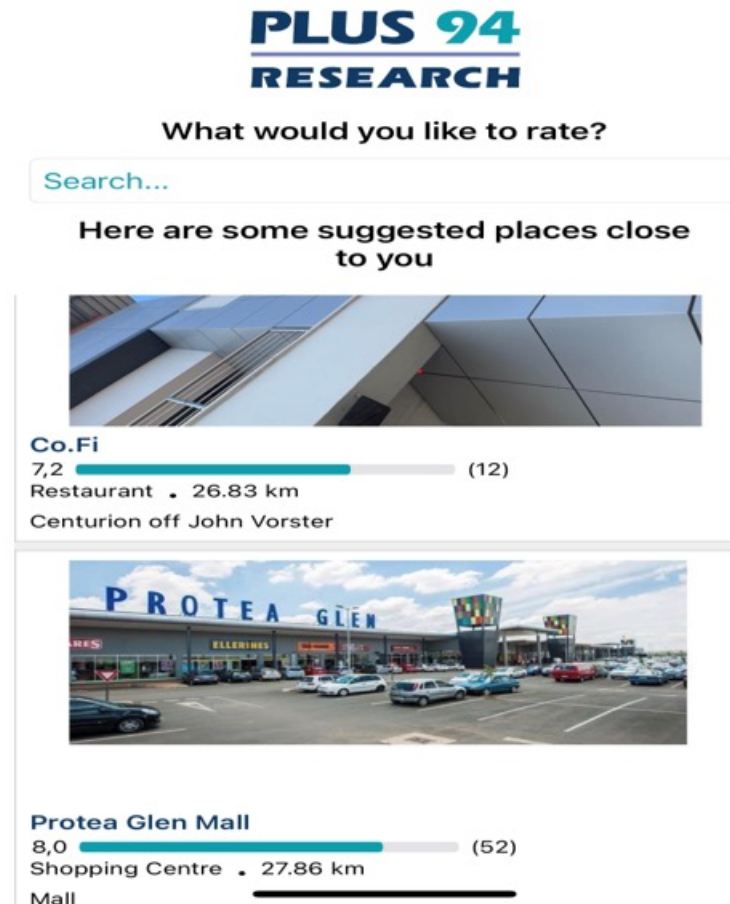
# Plus94 NPS App

The app allows users to rate any products and services that they use and comment about them. Respondents download the app in the presence of interviewers who demonstrate how it works for:

- Adding new services
- Products
- Rating of experiences and products

Note this is not for products and brands only, it could be a municipal office, pharmacy, night club, zoo, and a product.

The pilot test is being conducted amongst MAPS respondents.



# Product vs Media Stretch Level: Bought Cheese (P4W)

		Incidence of purchase (Out of 100)					Plus94 NPS App Data	
		Low Stretch	Lower Medium Stretch	Upper Medium Stretch	High Stretch	Total	*Avg. rating (out of 10)	Comment
BRAND	Total bought	38	49	57	59	50		
	Parmalat	19	26	27	28	25	8.75	Always worth buying
	Lancewood	4	8	9	11	7	7.25	Good taste
	Clover	6	5	7	9	6	10.00	The best cheese ever to garnish a salad
	Bonnita	4	5	8	9	6	-	-
	Crystal Valley	6	4	7	4	5	-	-
	Melrose	3	3	3	2	3	-	-
	Spar	1	1	1	1	1	-	-
	Ladismith	0	1	1	3	1	-	-
	PnP	1	0	1	1	1	-	-

NB: Only brands with total mentions of 1 in every 100 are shown.

Numbers may not add up due to rounding

\*Brand ratings to be treated with caution due to small samples

P4W = Past 4 weeks

MAPS PRESENTATION | MAY 2022

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Source: MAPS 2021 (January '21 – December '21)

Population 15+: 43 099 774 124

# Product vs Media Stretch Level: Drank Instant Coffee (YD)

		Incidence of drinking (Out of 100)					Plus94 NPS App Data	
		Low Stretch	Lower Medium Stretch	Upper Medium Stretch	High Stretch	Total	*Avg. rating (out of 10)	Comment
BRAND	Total drank	40	47	49	57	46		
	Ricoffy	26	26	22	22	24	7.67	Not too strong just perfect
	Frisco	11	12	11	11	11	8.00	It helps me with my health
	Jacobs Kronung	4	9	14	19	10	10.00	Quality brand and good taste
	Nescafe	1	3	4	6	3	9.00	I like the strong taste
	Koffiehuis	1	1	1	1	1	-	-
	Shoprite	1	1	1	0	1	-	-
	Douwe Egberts	1	0	1	2	1	-	-

NB: Only brands with total mentions of 1 in every 100 are shown.

Numbers may not add up due to rounding

\*Brand ratings to be treated with caution due to small samples

YD = yesterday

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Population 15+: 43 099 774 125

# Product vs Media Stretch Level: Bought Washing Powder/Liquid (P4W)

		Incidence of purchase (Out of 100)					Plus94 NPS App Data	
		Low Stretch	Lower Medium Stretch	Upper Medium Stretch	High Stretch	Total	*Avg. rating (out of 10)	Comment
BRAND	Total bought	86	85	85	83	85		
	Sunlight Powder	37	30	31	26	32	8.78	Cause you don't need to use a fabric softener
	MAQ	29	25	24	20	25	-	-
	OMO Powder	6	10	11	20	10	9.00	Smells good
	Fresh Wave Boxer	13	8	6	4	8	-	-
	Ariel Powder	4	8	9	9	7	6.00	Good product
	Surf	6	6	8	6	7	-	-
	Skip Powder	2	1	3	2	2	6.00	Good brand
	Sunlight Liquid	2	1	1	2	2	-	-
	OMO Liquid	1	1	2	4	2	-	-
	Shoprite	2	1	2	1	1	-	-
	Ariel Liquid	1	1	1	1	1	-	-
	Bio	1	1	1	1	1	-	-
	Biotex	0	1	1	1	1	-	-

NB: Only brands with total mentions of 1 in every 100 are shown.

Numbers may not add up due to rounding

\*Brand ratings to be treated with caution due to small samples

P4W = past 4 weeks

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Population 15+: 43 099 774 126



# THANK YOU



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