MARKETING RESEARCH FOUNDATION

PLUS 94 RESEARCH

MAPS DATA OVERVIEW:

April 2021 – March 2022

Prepared by Plus 94 Research

Scope of MAPS Survey

MARKETING RESEARCH FOUNDATION

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 – P4W, P7D and Yesterday
  - Location of TV viewing
  - Satellite services/packages used
  - Type of TV decoder used
- Radio
  - Radio stations listened to – P4W, P7D 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
- Alcohol and non-alcoholic beverages
- Pet food
- Personal care items
- Clothing

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Source: MAPS 2021/2022 (Apr '21 – Mar '22)

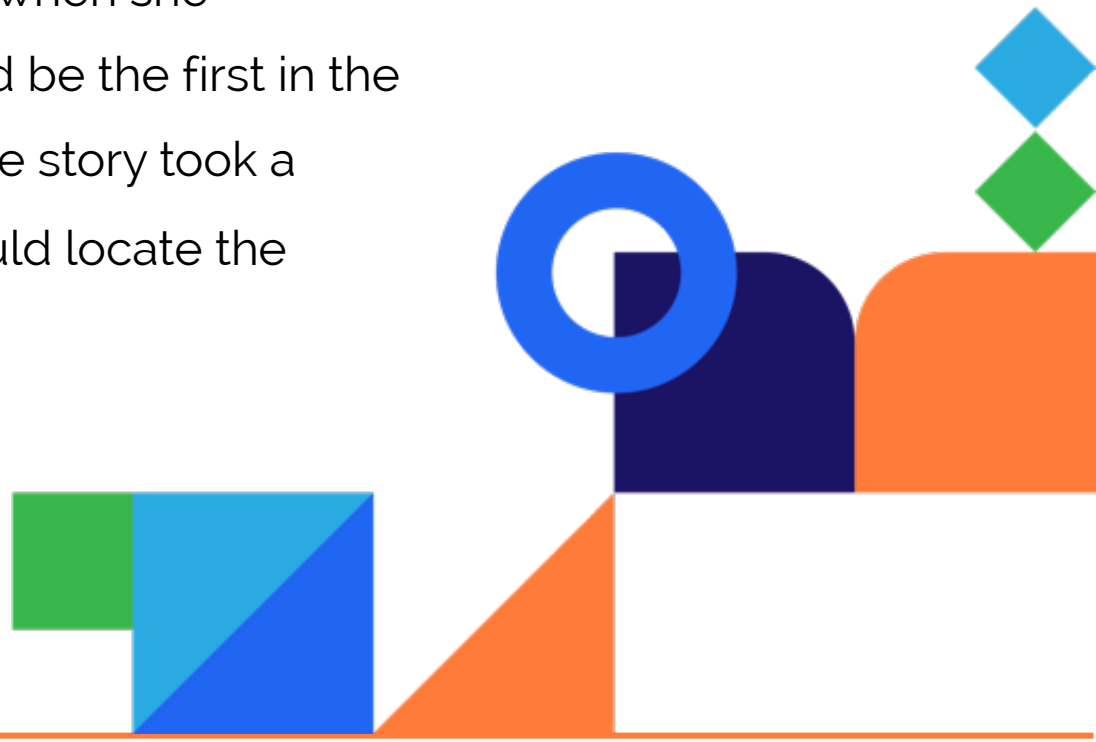
Fieldwork Landscape

April-July 2021

- April 15, the extension of national disaster causing further frustration on the nation and most importantly business owners.
- 19 of April, singer Lira suffers a stroke in Germany before her scheduled performance.
- Beginning of May was the PSL playoffs resulting in a win from Mamelodi Sundowns.
- Between 11-8 July, South Africa experienced an unrest caused a mass looting this was caused by imprisonment of former President of South Africa Jacob Zuma, economic inequality Criminality and unemployment.

August-October 2021

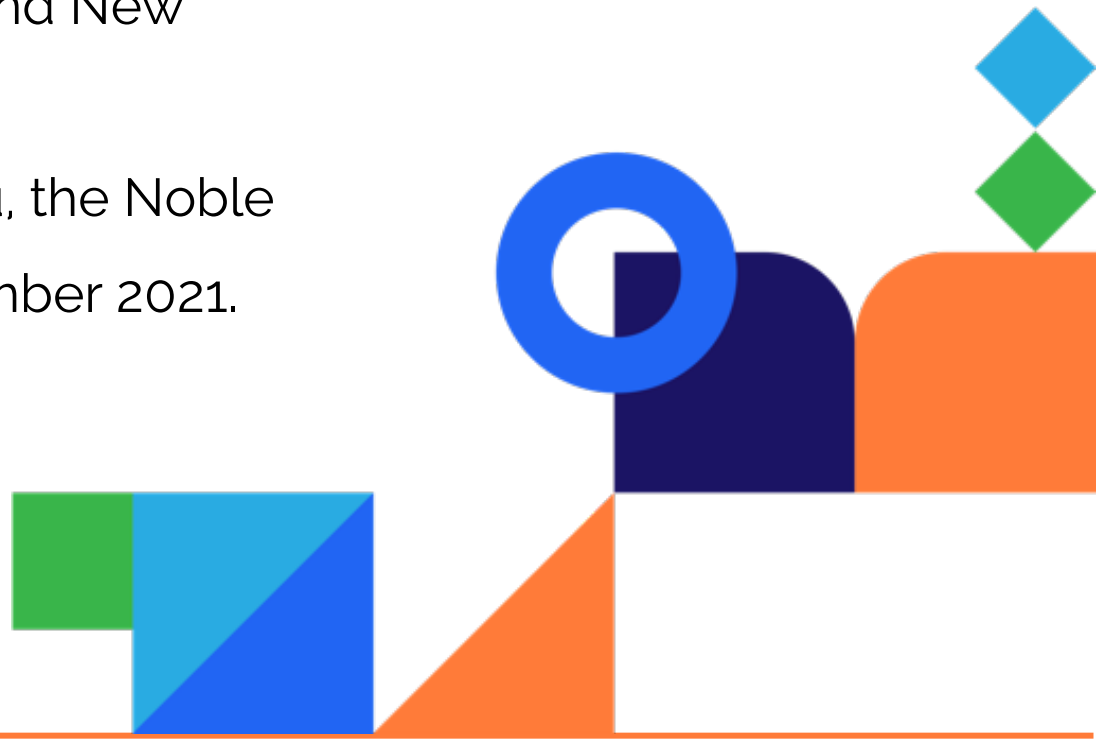
- The wait over the R350 grant from the government came to an end as the pay out began mid August 2021.
- Early September South Africa moves to level 1.
- A lady in Tembisa brought the country to a stand still when she announced that she was expecting 10 babies, it would be the first in the world, a record breaker for most delivered babies. The story took a different turn when no one (including the mother) could locate the whereabouts of the babies to this day.



Source: MAPS 2021/2022 (Apr '21 – Mar '22)

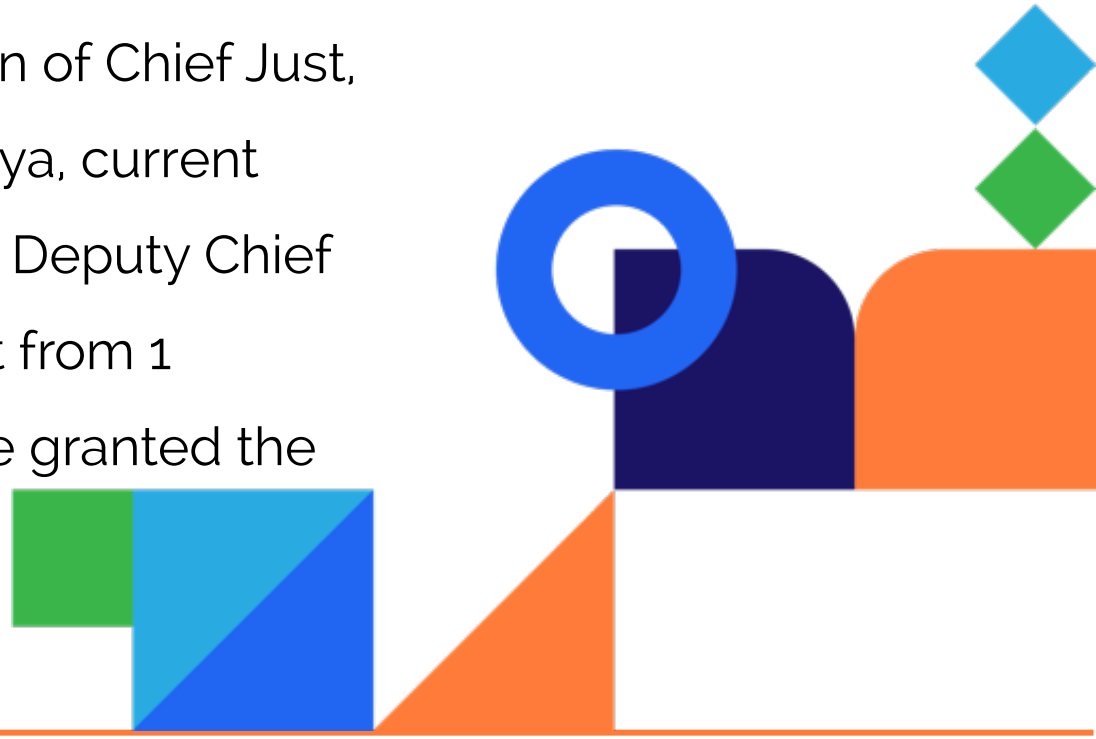
November-December 2021

- The 2021 South African municipal elections were held on 1 November 2021.
- Cabinet announced the end of Zimbabwe permits.
- The country got to spend their first Christmas and New Years outdoors since the start of the pandemic.
- Condolences pour in for the late Desmond Tutu, the Noble Peace Prize Winner who passed on 26th December 2021.



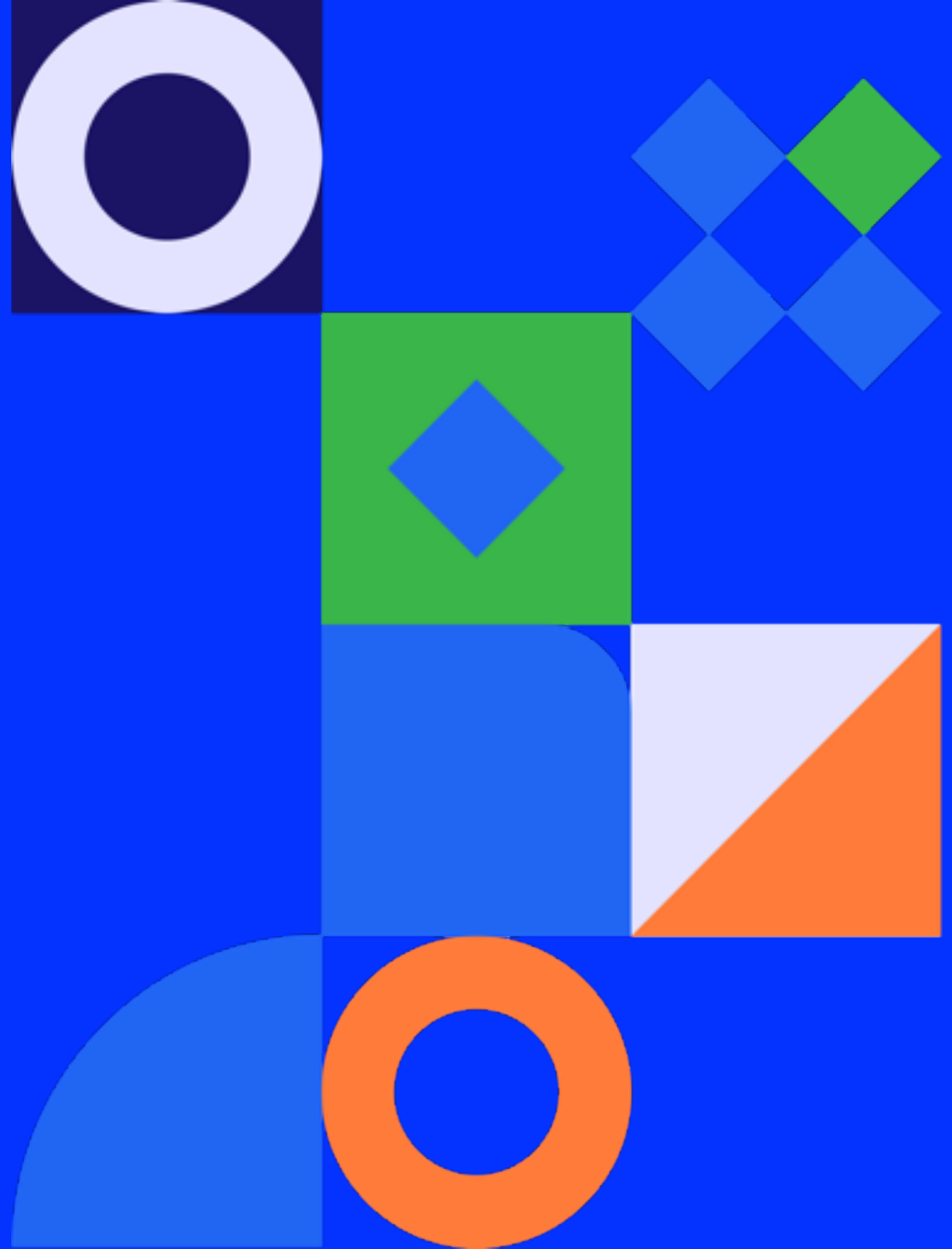
January-March 2022

- The passing of musician Ricky Rick, was announced on the 23rd of February.
- On the 24th of February, Russia invaded Ukraine.
- 11th of March, Justice Zondo assumed the position of Chief Just, and Madam Justice Mandisa Muriel Lindelwa Maya, current President of the Supreme Court of Appeal, as the Deputy Chief Justice of the Republic of South Africa with effect from 1 September 2022 making her the first female to be granted the position.



Source: MAPS 2021/2022 (Apr '21 – Mar '22)

Health Check



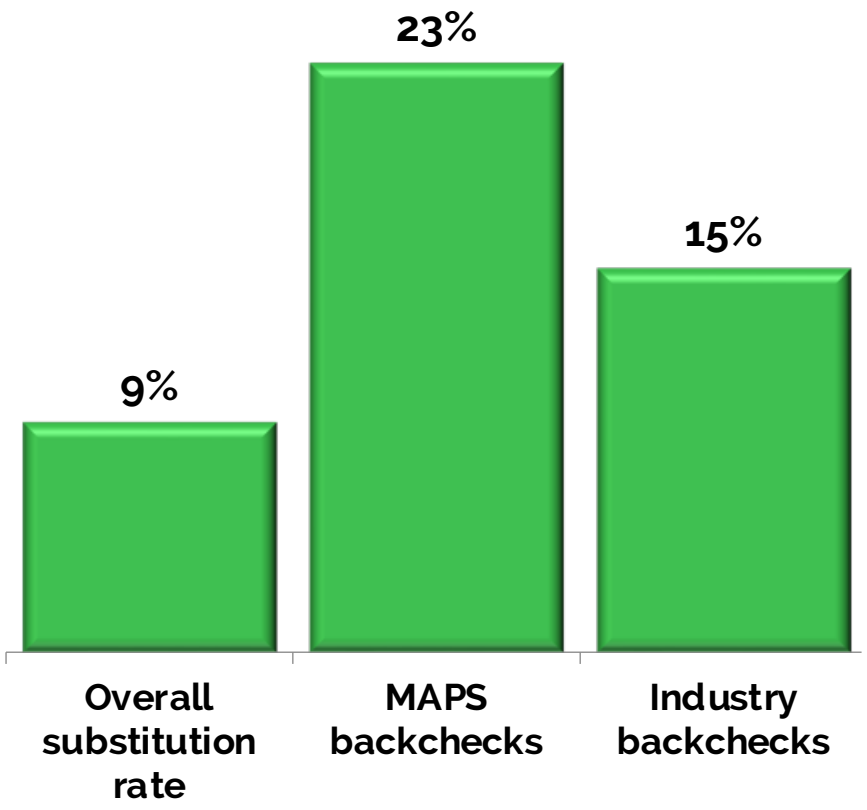
Sampling

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.
  - Post fieldwork verification through use of GIS mapping.

Substitutions & Backchecks



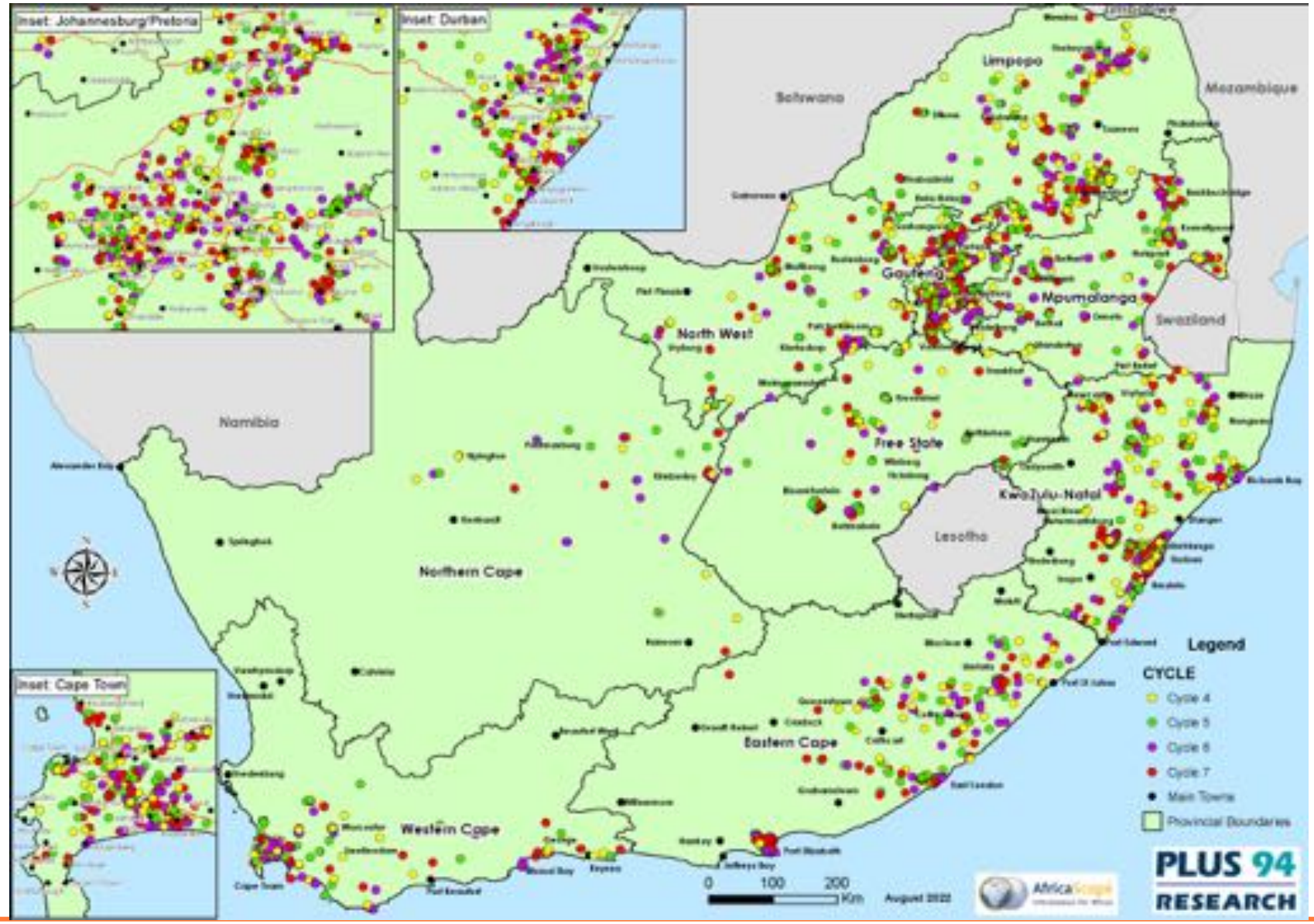
Substitutions required due to:

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

Source: MAPS 2021/2022 (Apr '21 – Mar '22)

Population 15+: 43 085 487

Dwellings Visited



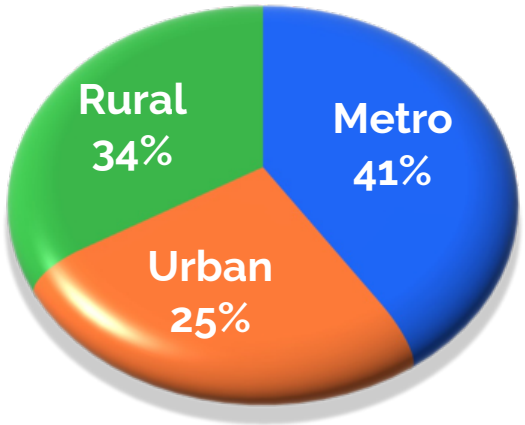
Source: MAPS 2021/2022 (Apr '21 – Mar '22)

Population 15+: 43 085 487

Demographic Profiles

Population Distribution

Area Distribution



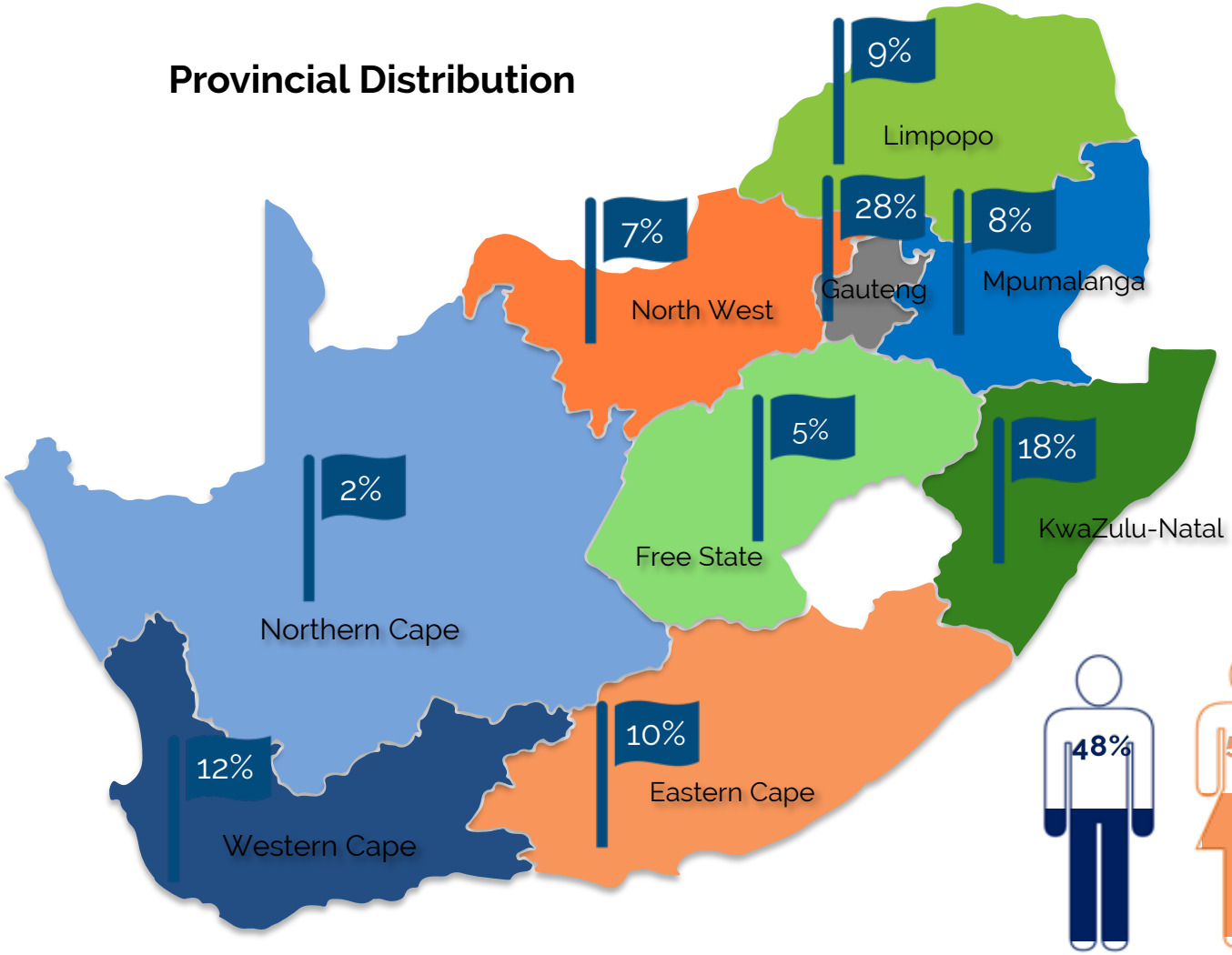
Households

17.16m

People per household

3.5

Provincial Distribution



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Demographic Profile

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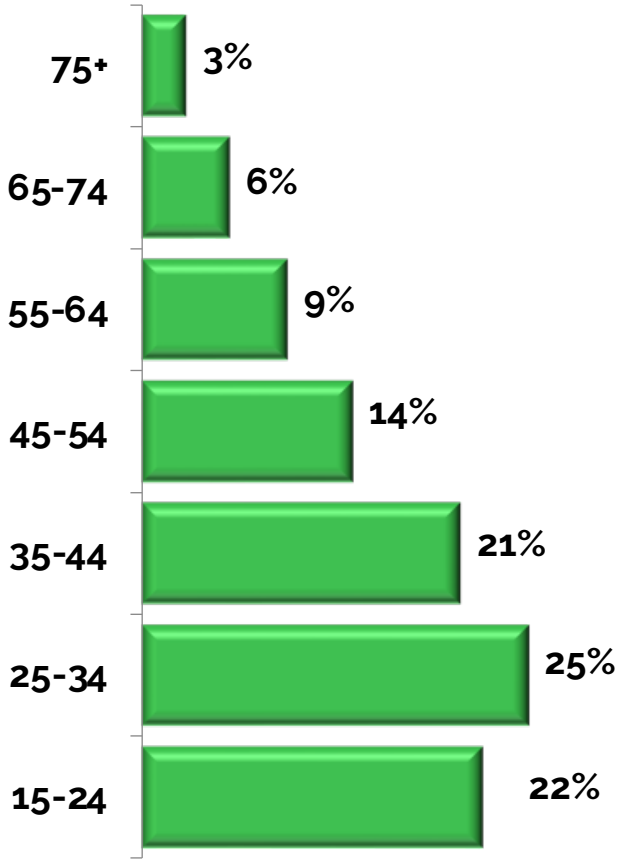
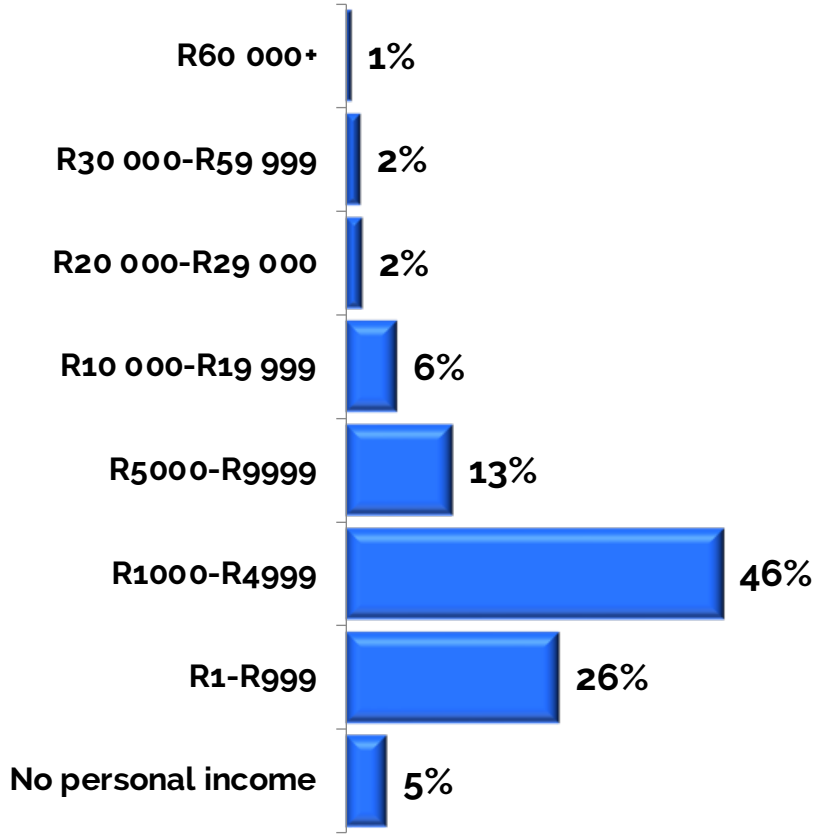
Age Groups



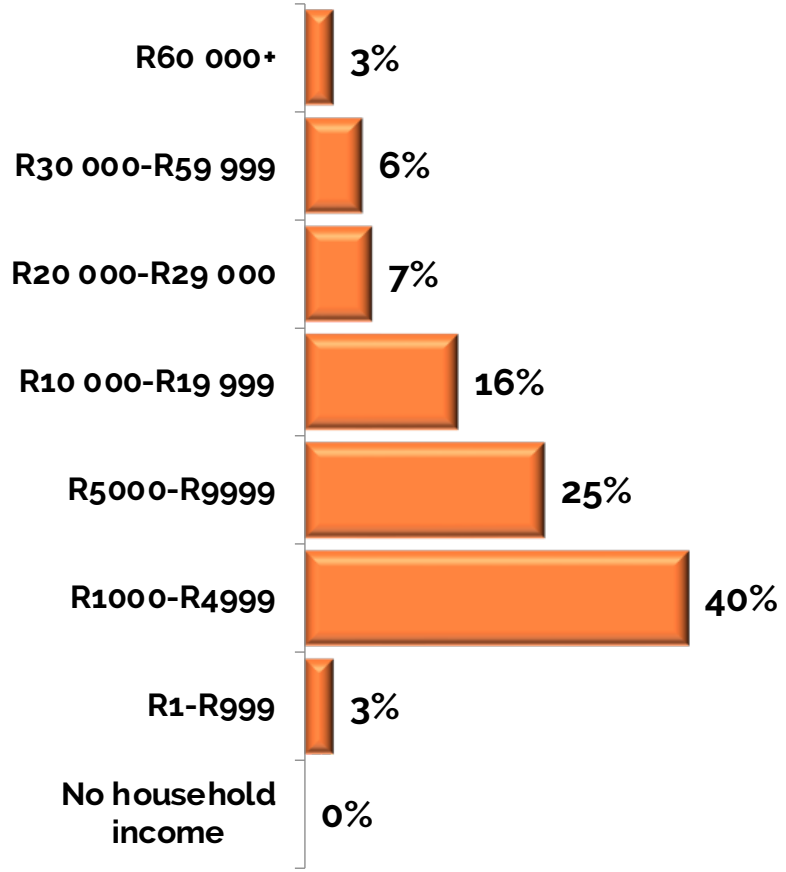
Average age of respondents is **38** years

Personal Income



Average personal income: **R4 705**

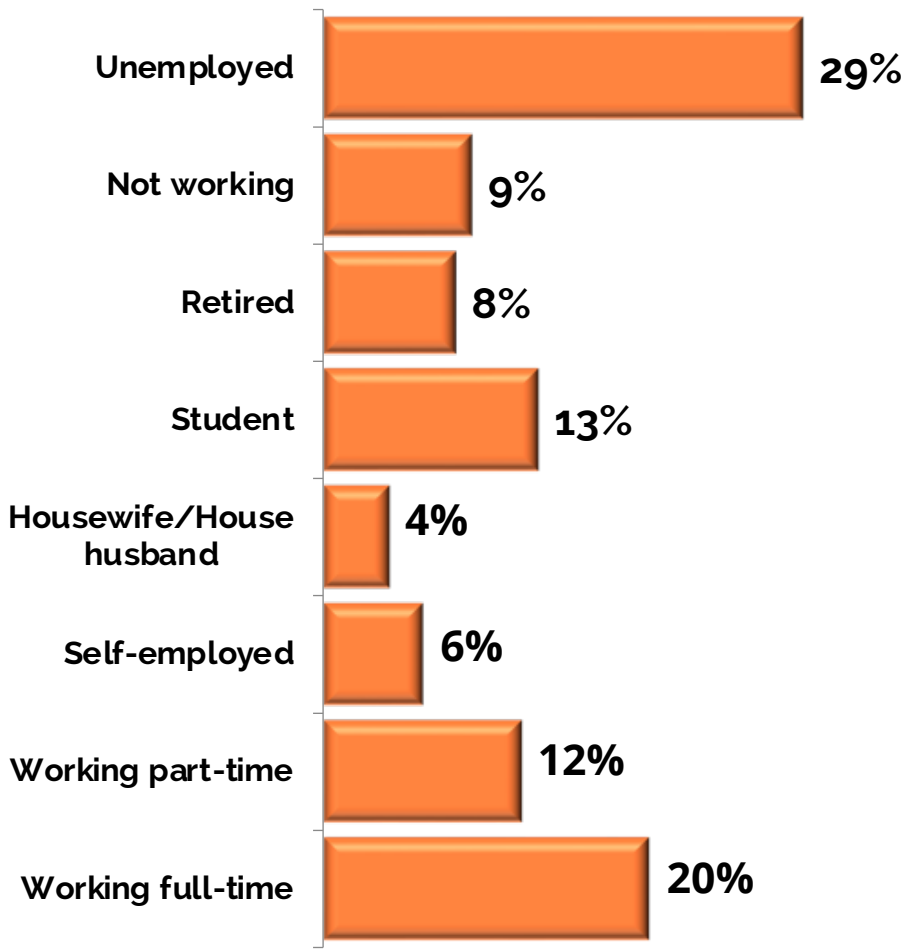
Household Income



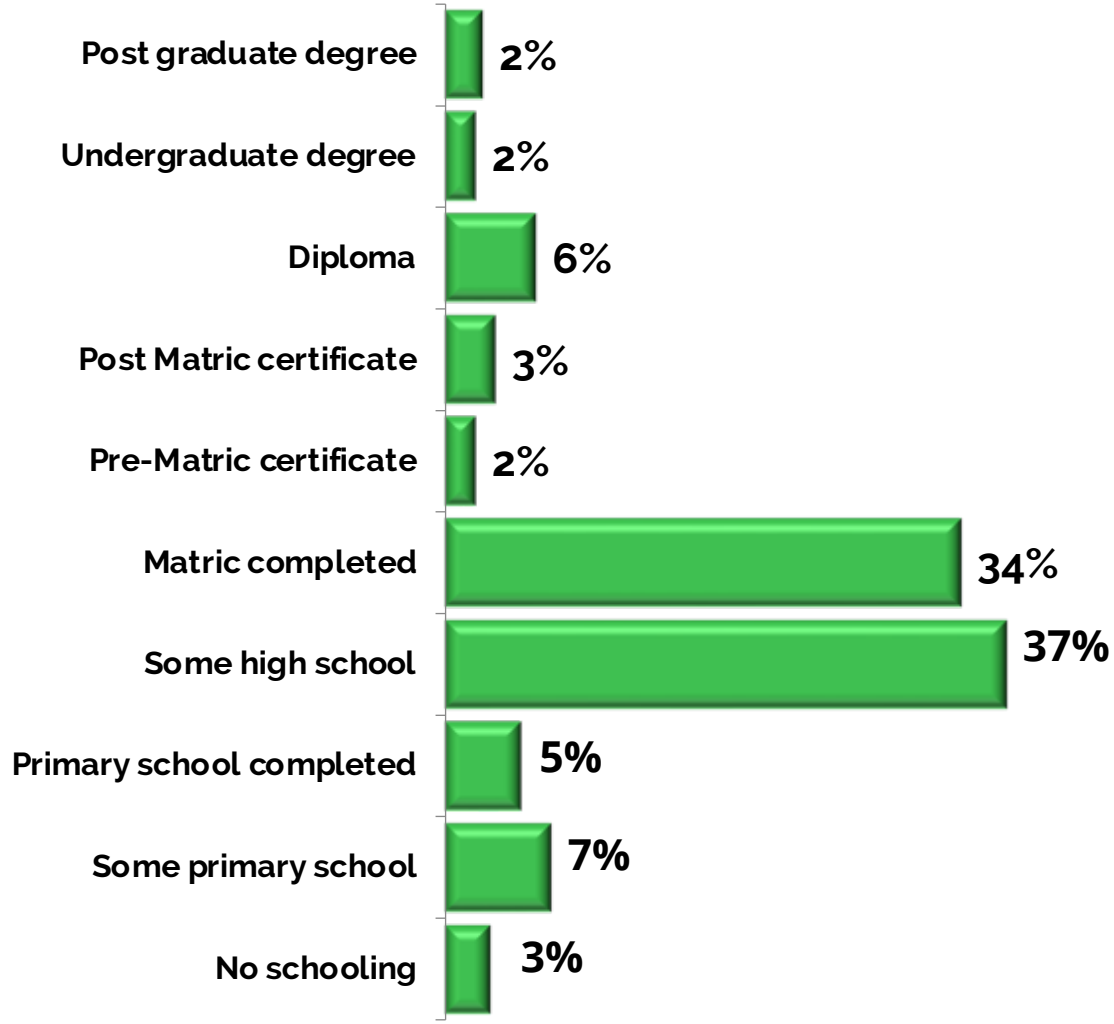
Average household income: **R11 672**

Demographic Profile

Work Status



Highest Level of Education Achieved



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Demographic Profile

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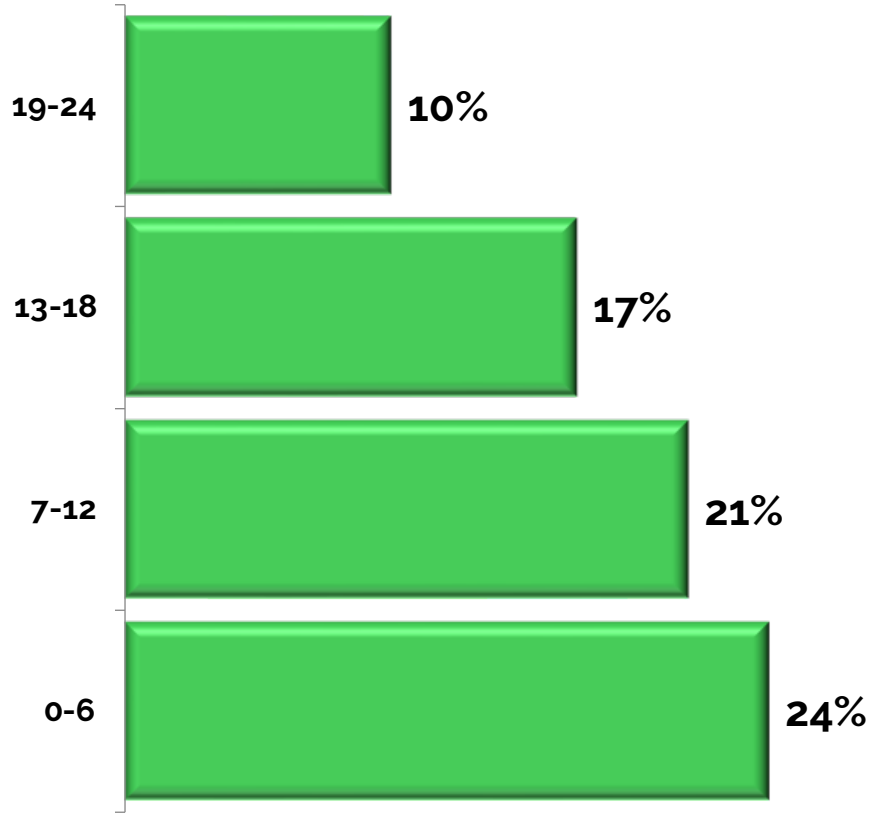
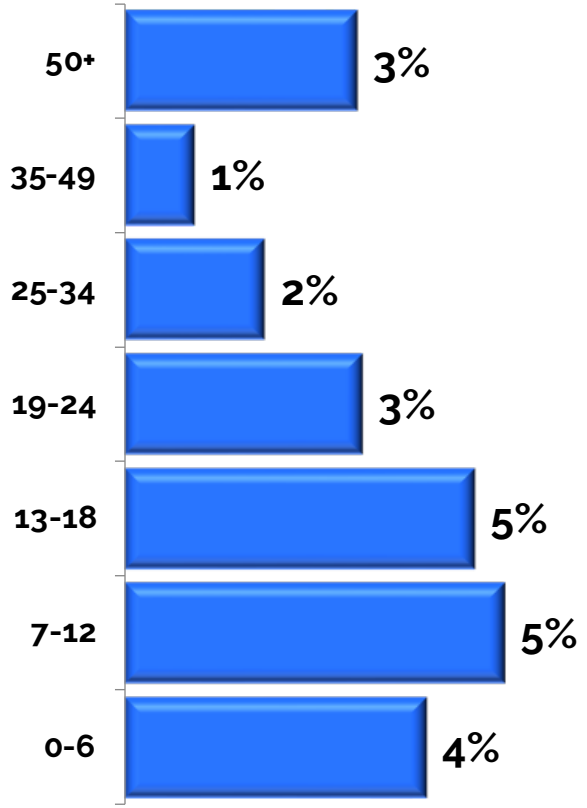
Age: Dependents (own children)



Age: Other dependents (not own children)



46% of respondents have dependents who are their own children.

In total, about have 52% of all respondents have dependents.

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

Dependents [Jul-Dec '20 vs. July-Dec '21]

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2020|2021

2020: 46% [20 010 924] of respondents have dependents who are their own children

2021: 47% [20 135 498] of respondents have dependents who are their own children

2020|2021

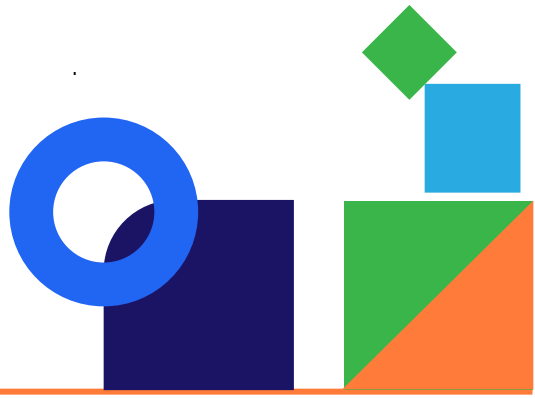
2020: In total, about have 55% [23 361 058] of all respondents have dependents.

2021: In total, about have 52% [22 484 682] of all respondents have dependents

2020|2021

2020: 20% [8 576 522] of respondents have dependents who are not their own children

2021: 15% [6 656 142] of respondents have dependents who are not their own children



Segmentation

Segmentation

LSM Segmentation

- Living Standards Measure 1 levels 1 - 10

SEM Segmentation

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

Self Perceptions

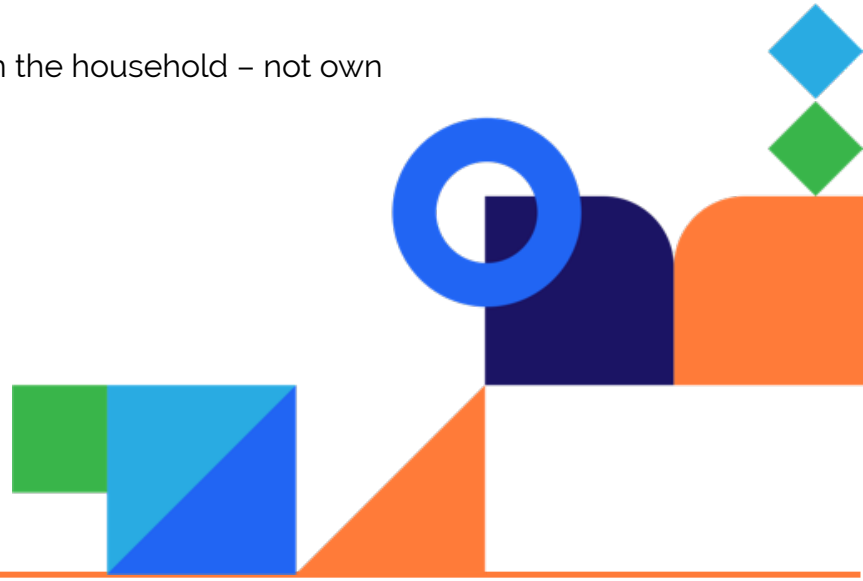
- Self-perception of the consumer
  - Health Status
  - Parenting Scores

Income

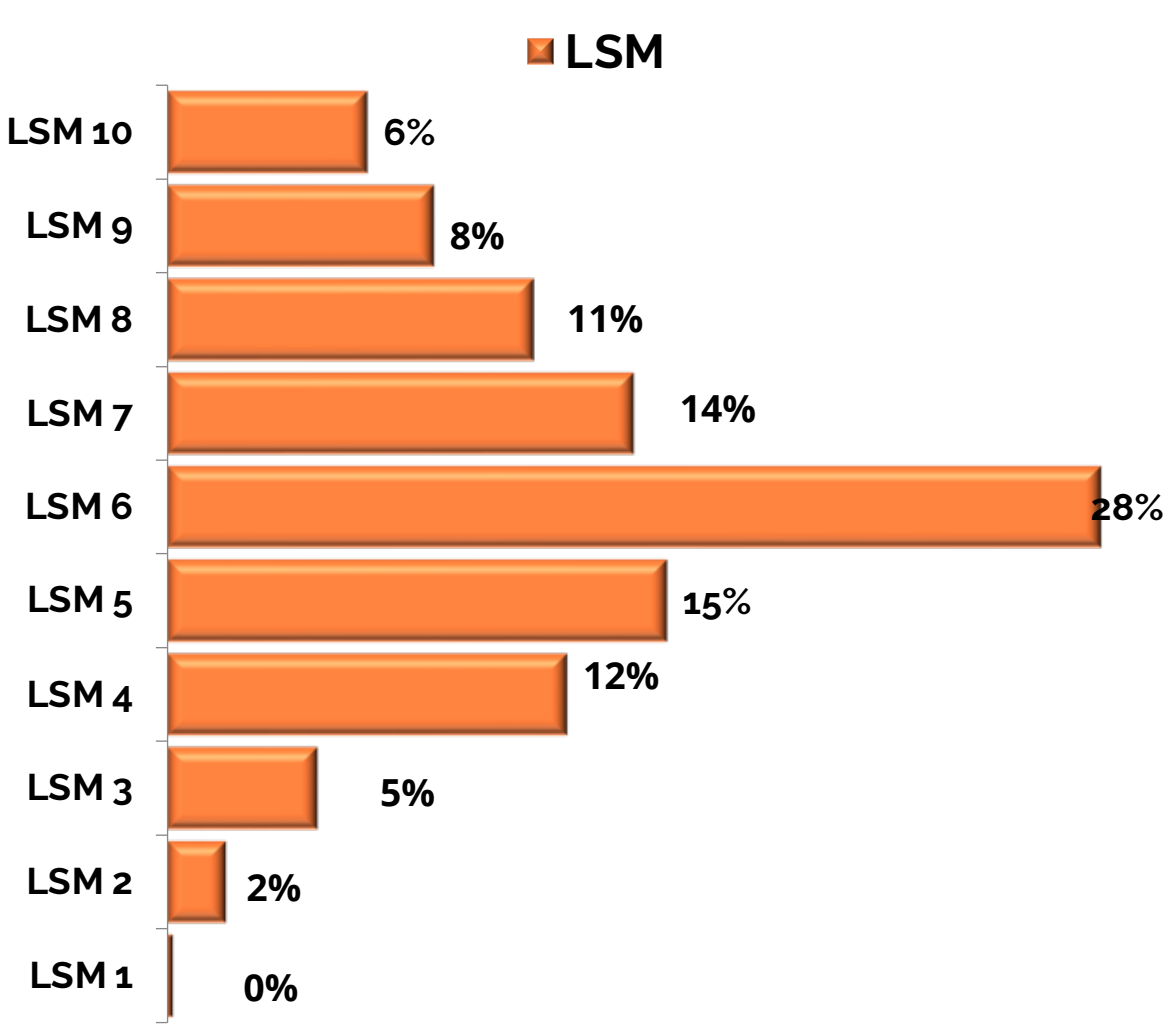
- Personal income
- Household income
- Employment status

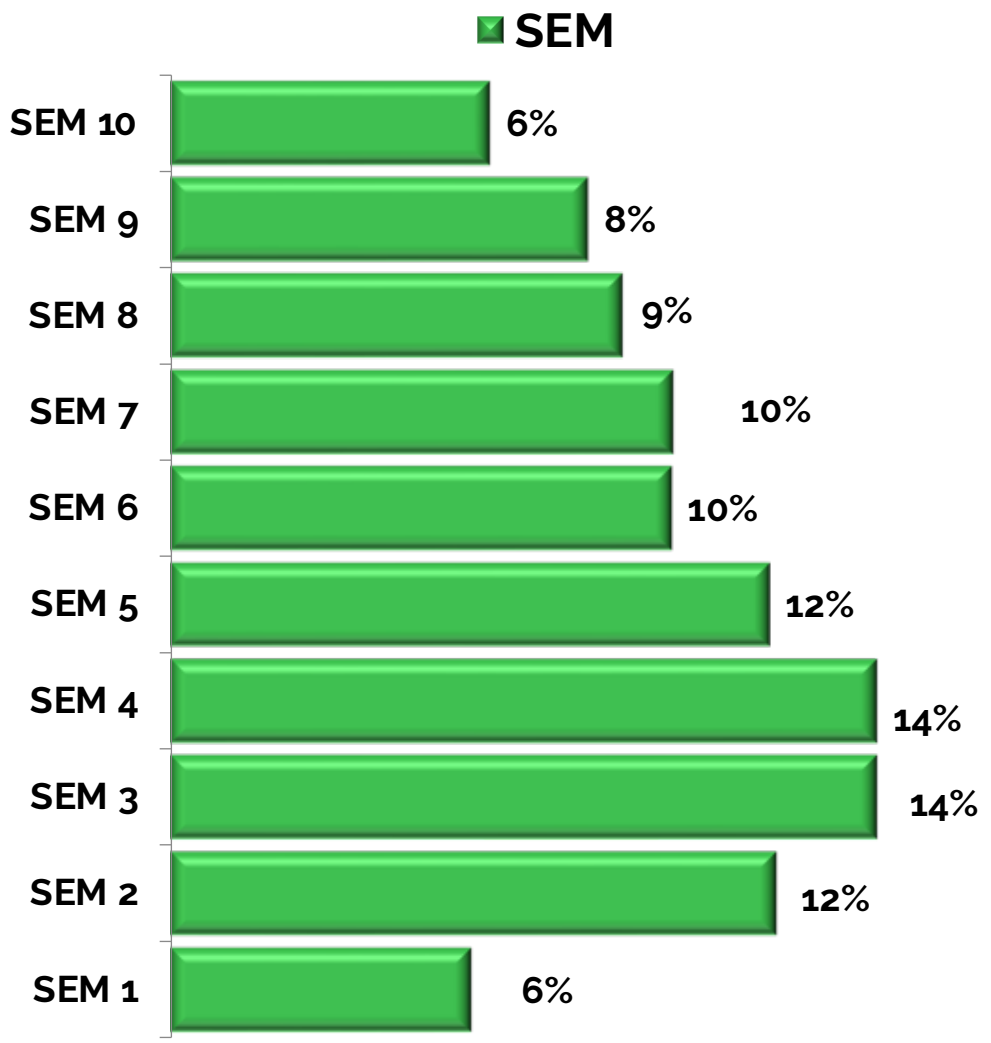
Demographics

- 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



LSM and SEM Segmentation





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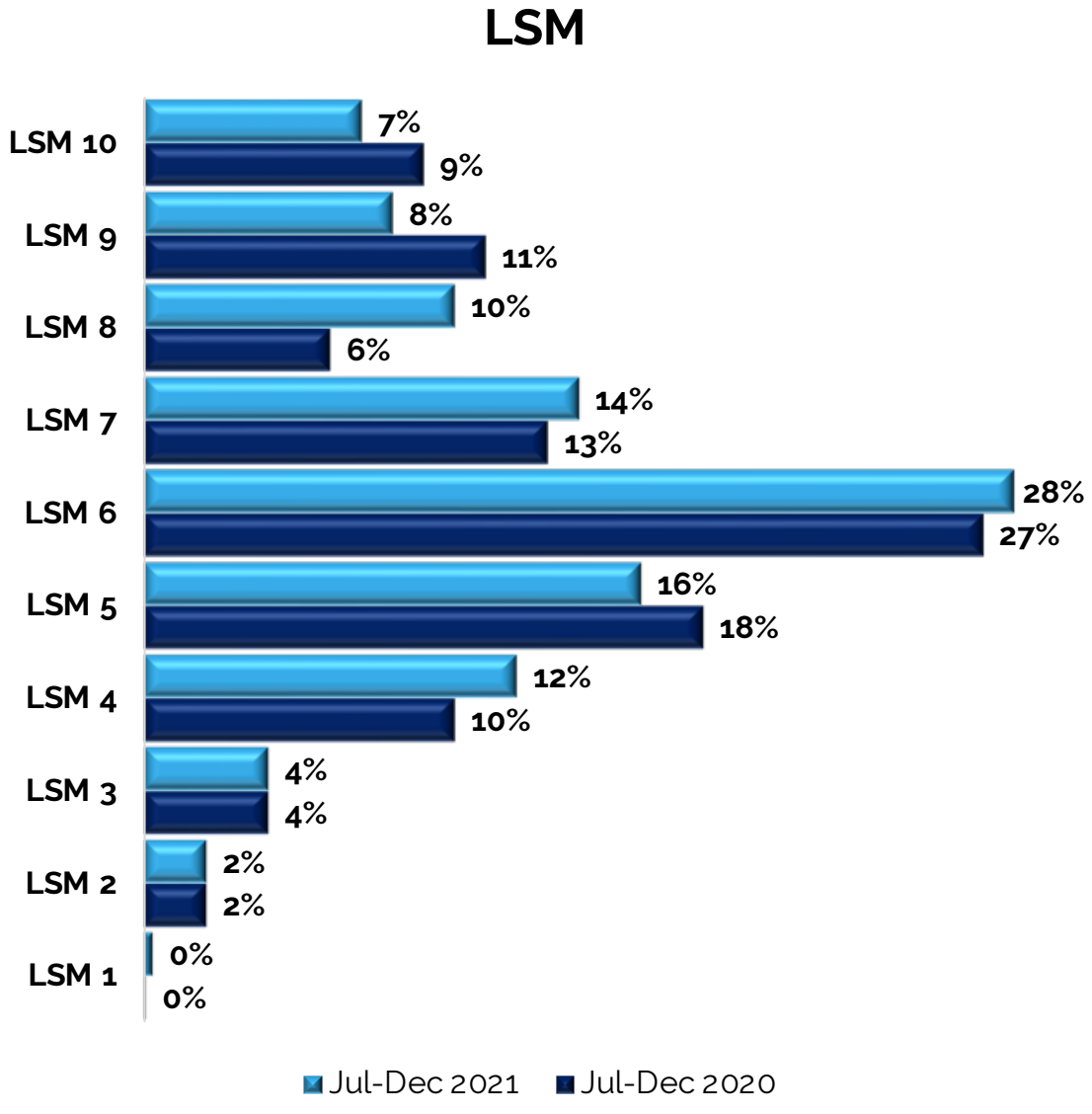
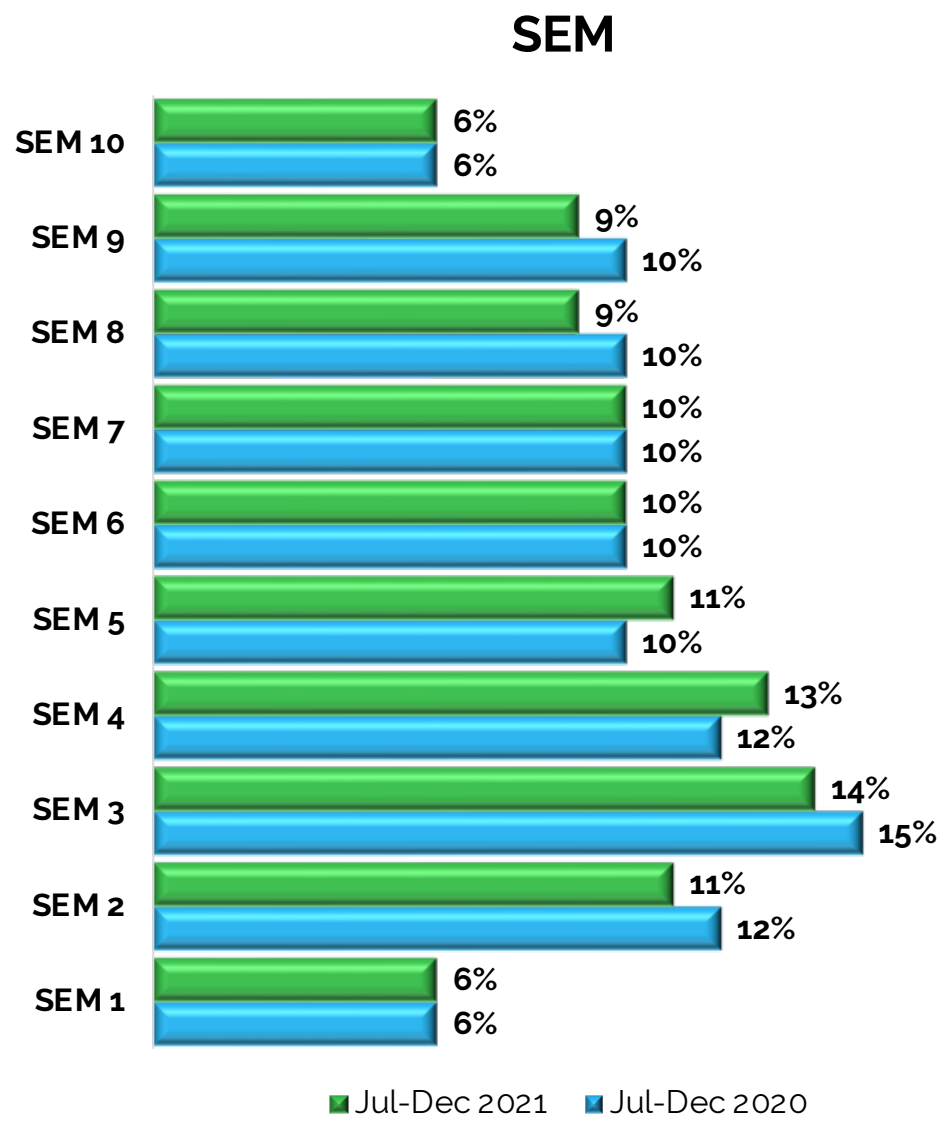
Population 15+: 43 085 487

Segmentation [Jul-Dec '20 vs. Jul-Dec '21]





Generations and Life Stages Segmentation

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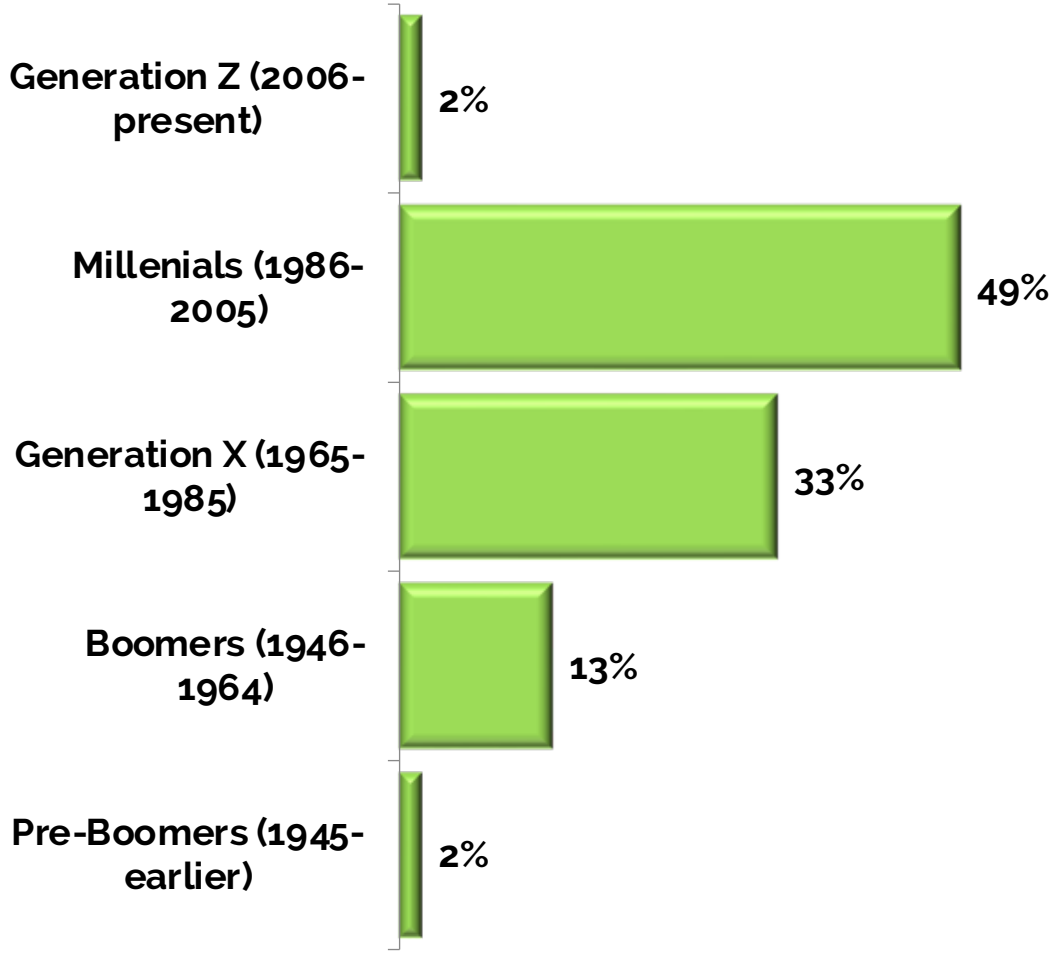
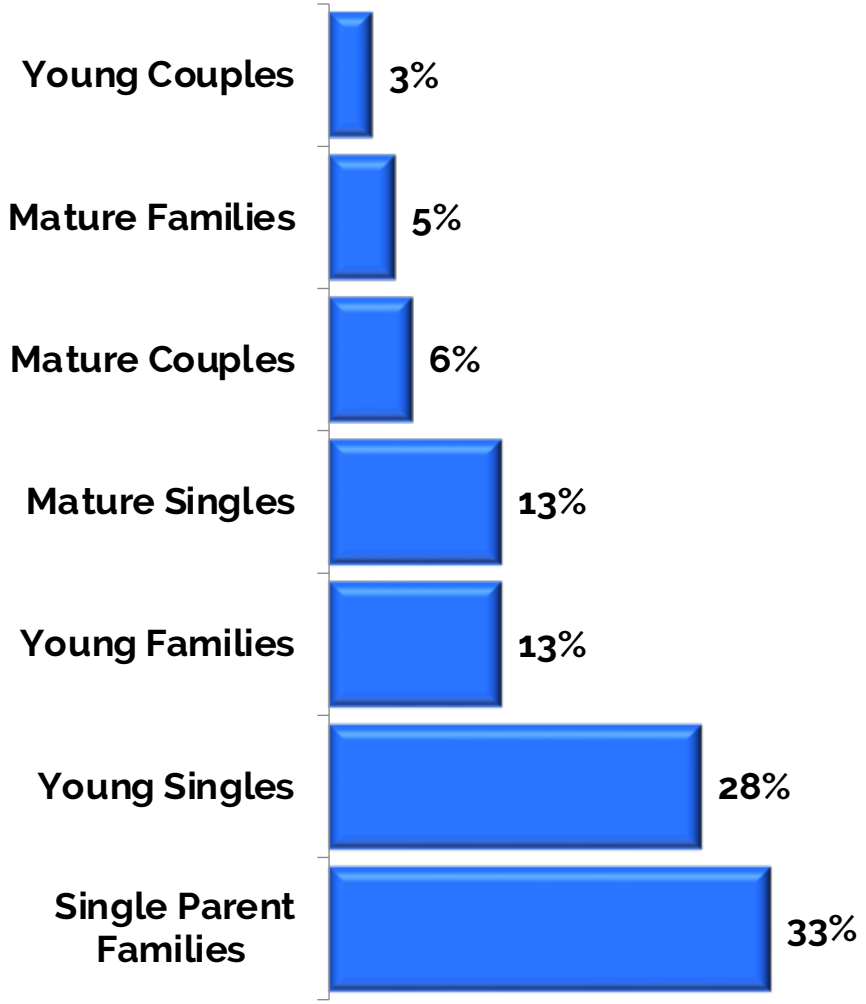
Generations



Life Stages



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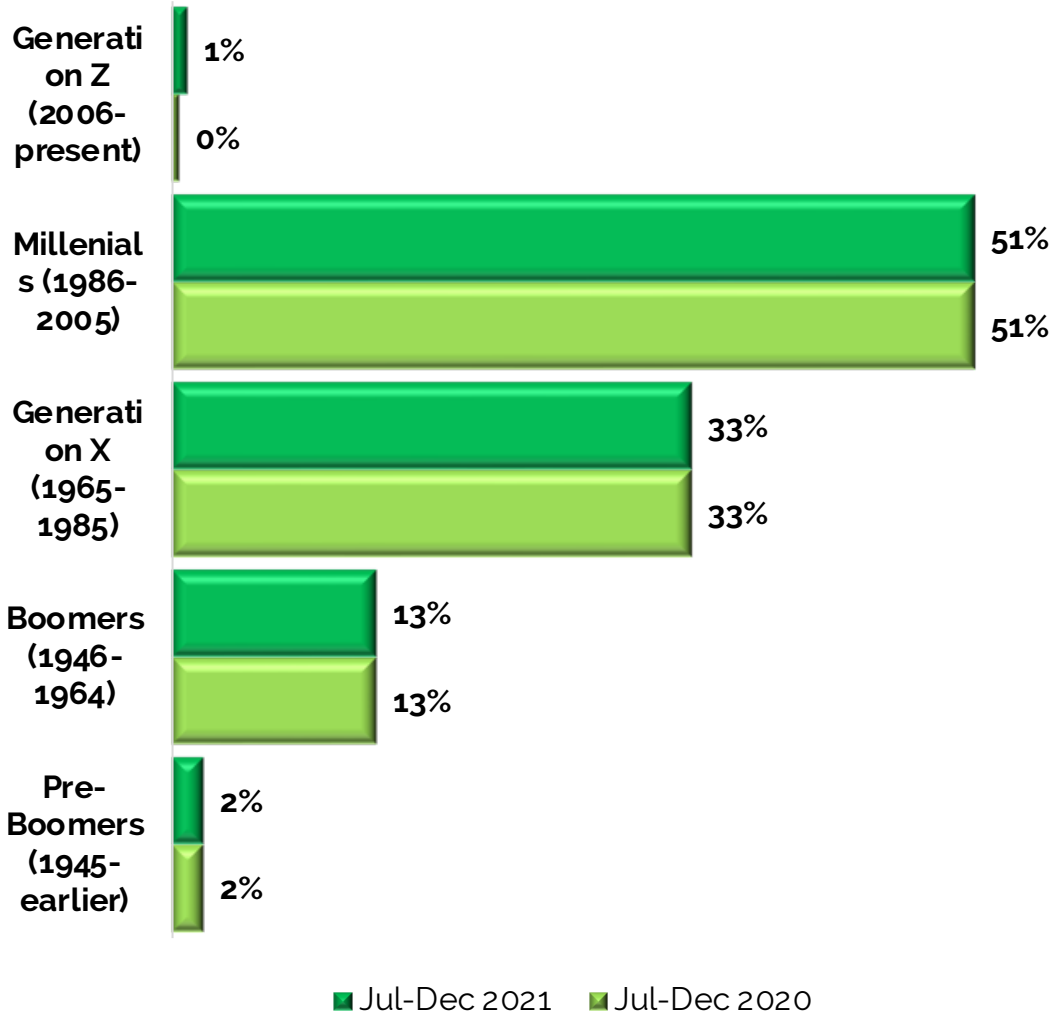
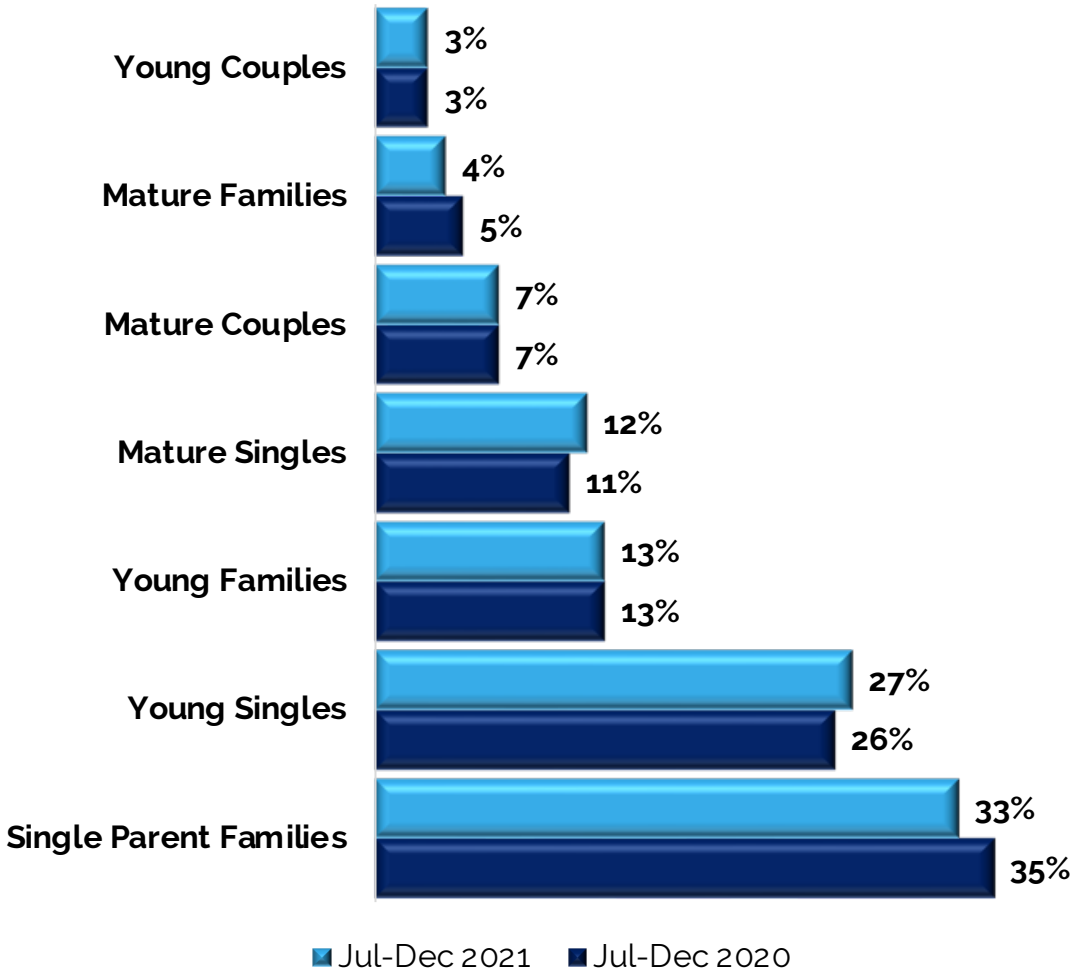
Segmentation [Jul-Dec '20 vs. Jul-Dec '21]

Generations



Life Stages



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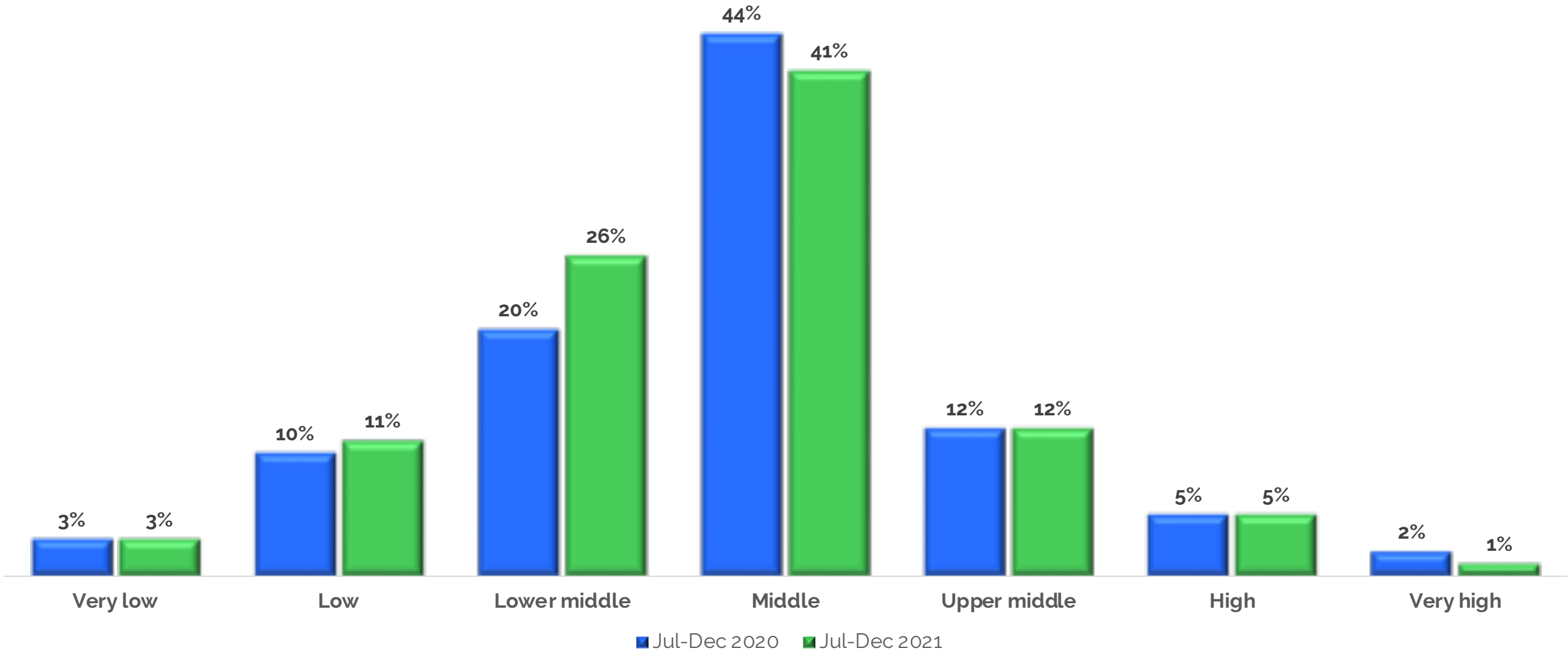
Population 15+: 43 085 487

Self Perception of the Consumer

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



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Self Perception of the Consumer

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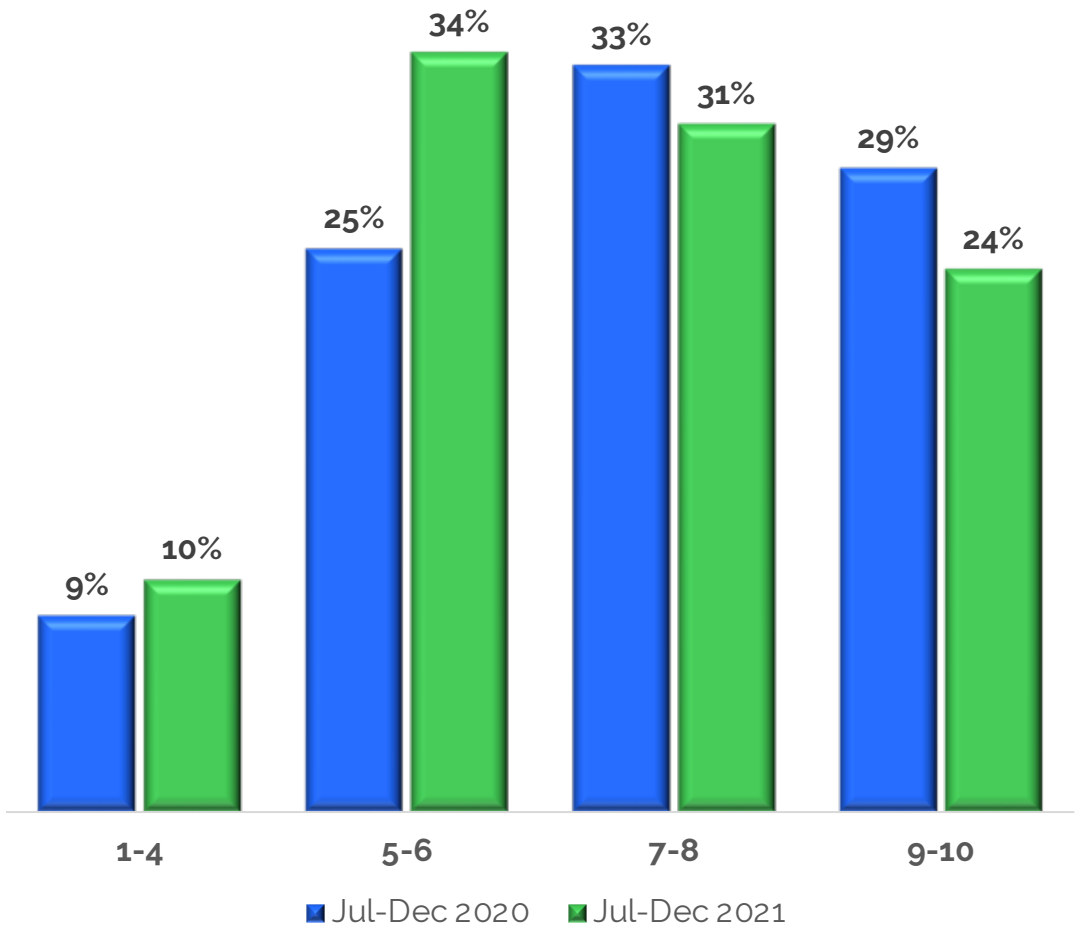
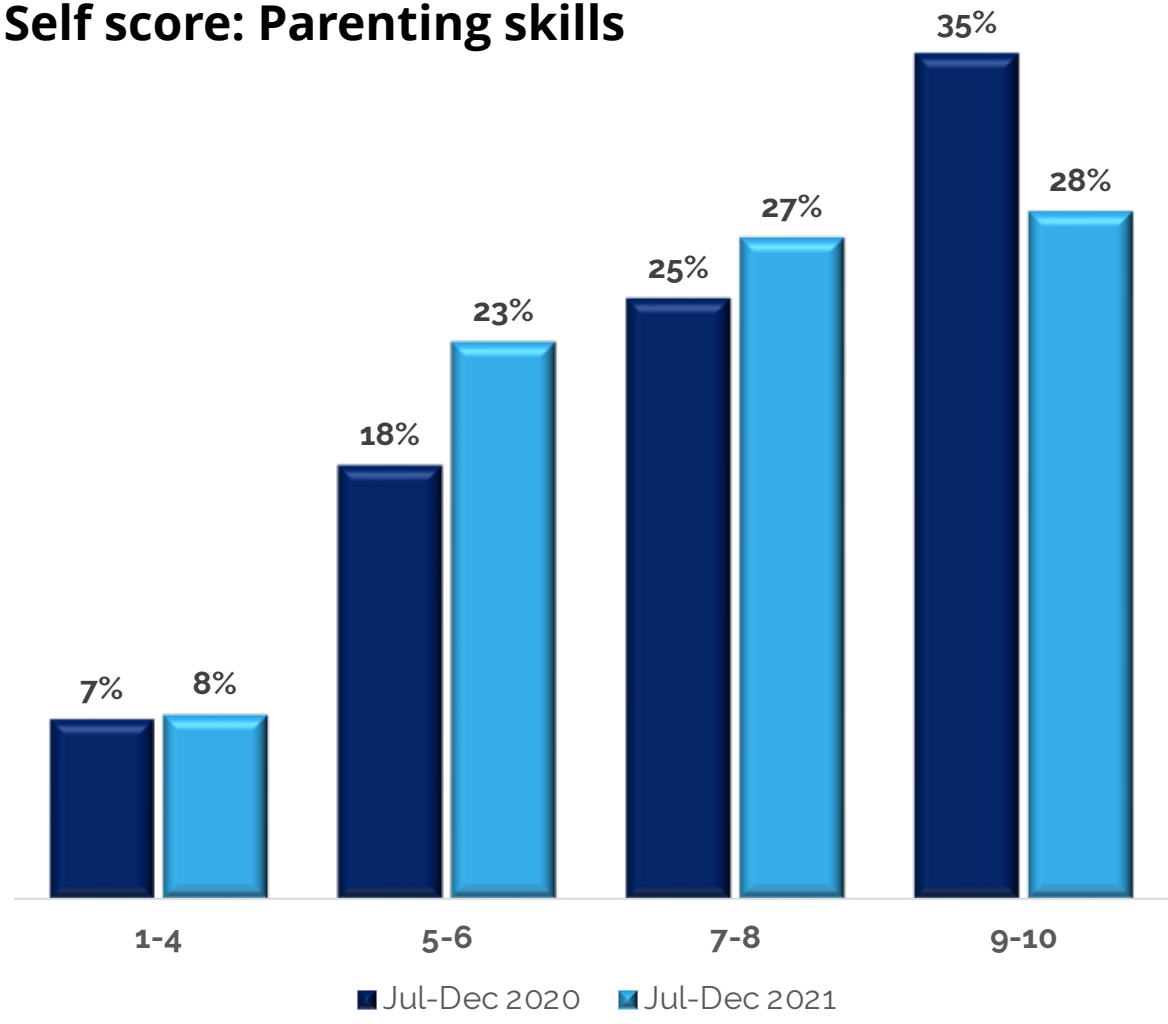
Self score: Health status



Self score: Parenting skills



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Media

MEDIA

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Print Media

- Newspapers
- Magazines
- Store Magazines
- Newspaper Inserts
- Platform Used

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

Cinema

- Cinema Attendance
- Cinema Chains
- Average Amount Spent per Cinema Outing
- Cinema Benefit Programmes

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

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 2021/2022 (Apr '21 – Mar '22)

Media Penetration – P4W

Newspapers 35%	**Newspaper Inserts** 14%	**Magazines** 10%	**Store Magazines** 17%
Television [linear/live] 72%	**Cinema** 1%	**Radio** 68%	**Out of Home Advertising** 58%
Streaming Content 43%	***Social Media** 52%		

***48%**
Excluding WhatsApp

***52%**
Including WhatsApp

Media Penetration Shift [Jul-Dec '20 vs. Jul-Dec '21]

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Newspapers [P3M]
2020|2021
51%|36%

Newspaper Inserts [P4W]
2020|2021
22%|14%

Magazines [P3M]
2020|2021
16%|12%

Store Magazines [P3M]
2020|2021
22%|18%

Television [P4W]
2020|2021
78%|72%

Cinema [P4W]
2020|2021
1%|1%

Radio [P4W]
2020|2021
76%|67%

Out of Home Advertising
2020|2021
62%|58%

Streaming Content [P4W]
2020|2021
48%|43%

***Social Media [P4W]**
2020|2021
55%|52%

*Including WhatsApp

Source: MAPS 2021/2022 (Apr '21 – Mar '22)

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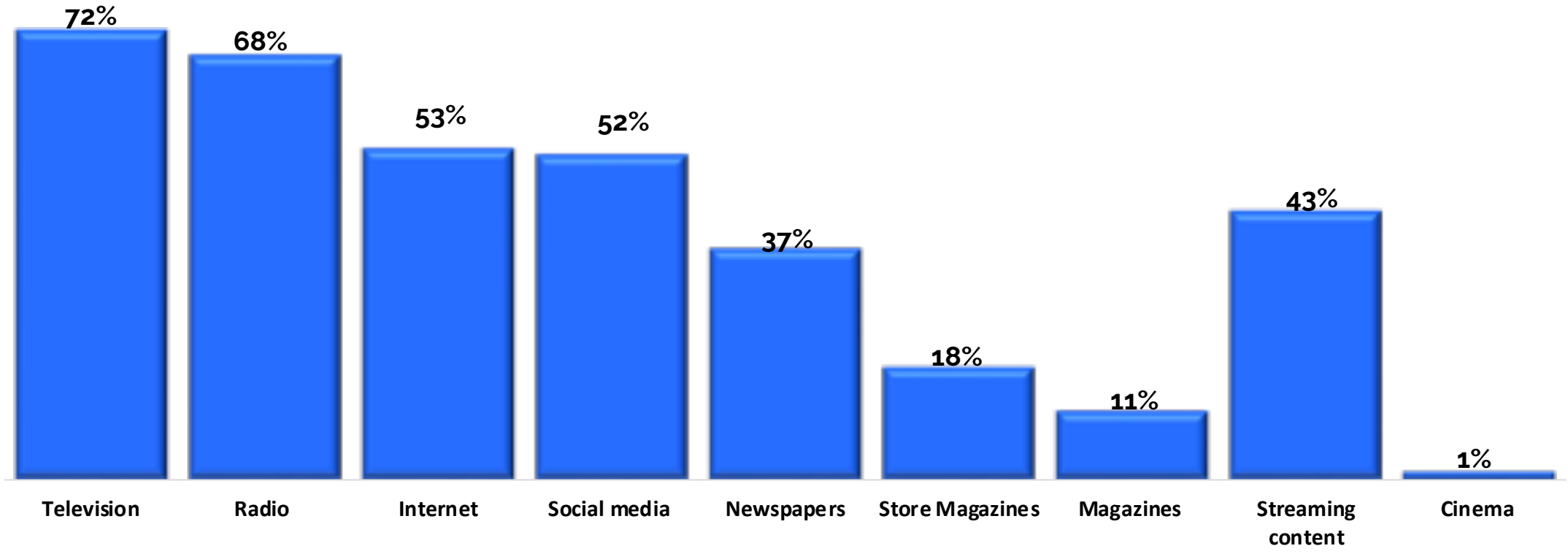
Media Consumption - P4W



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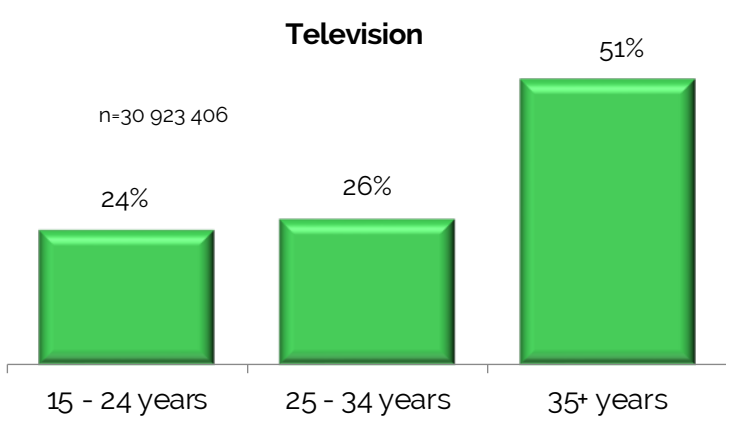
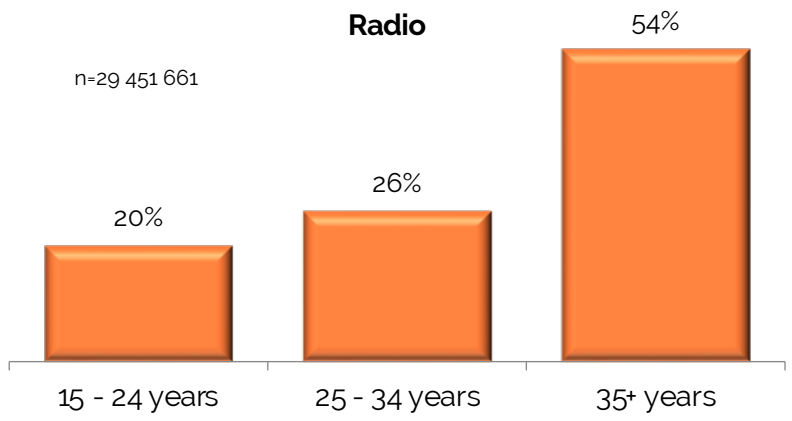
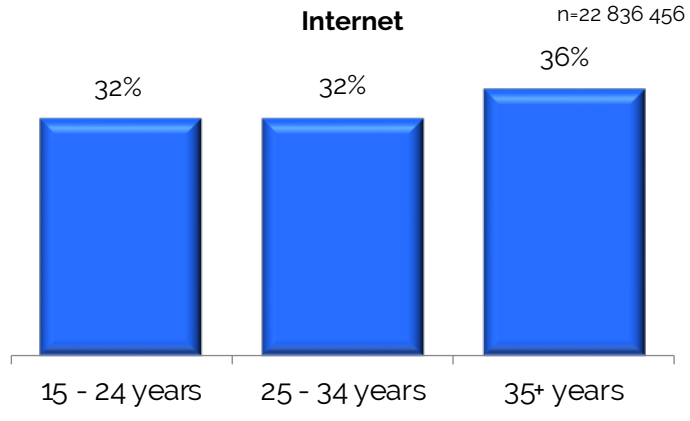
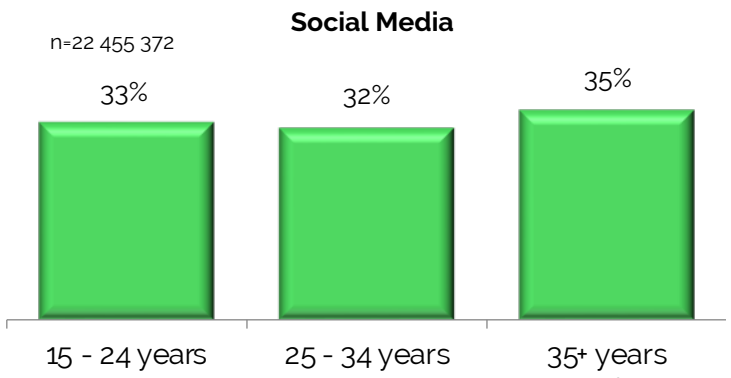
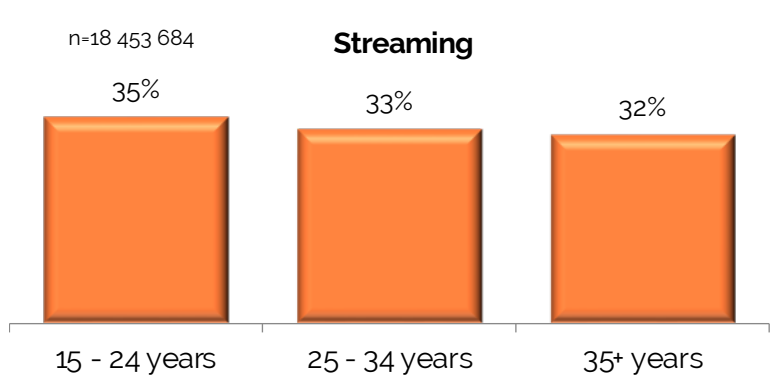
Media Consumption By HH Income Bands – P4W

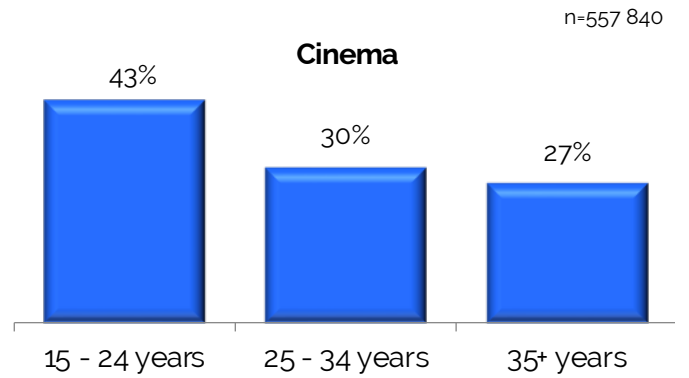


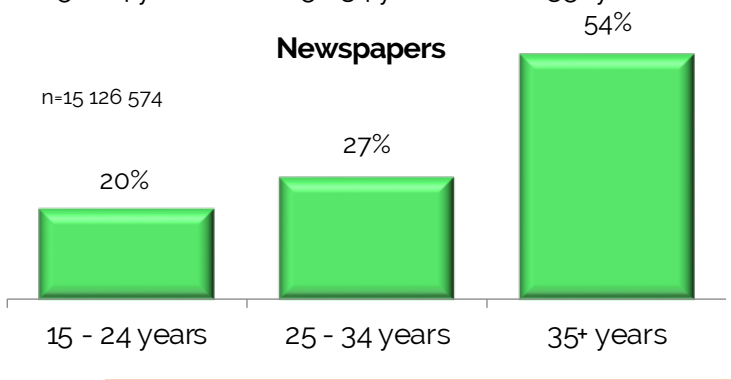


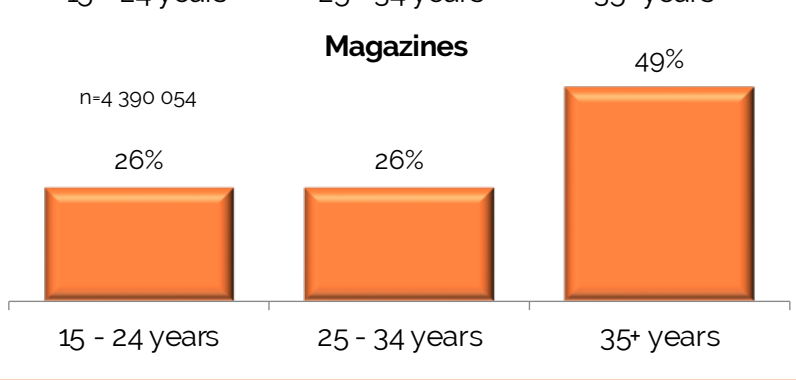


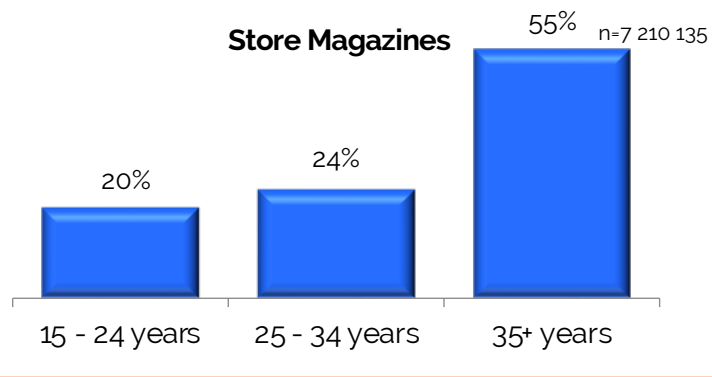








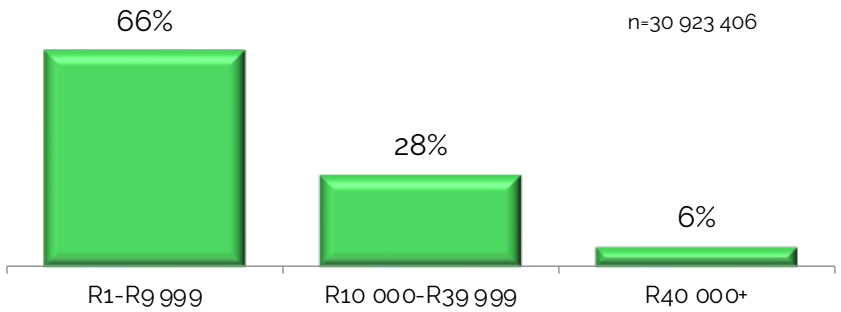




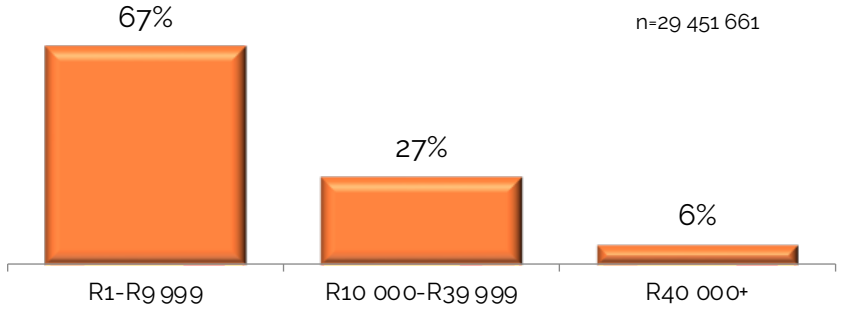
Media Consumption By HH Income Bands – P4W

MARKETING RESEARCH FOUNDATION

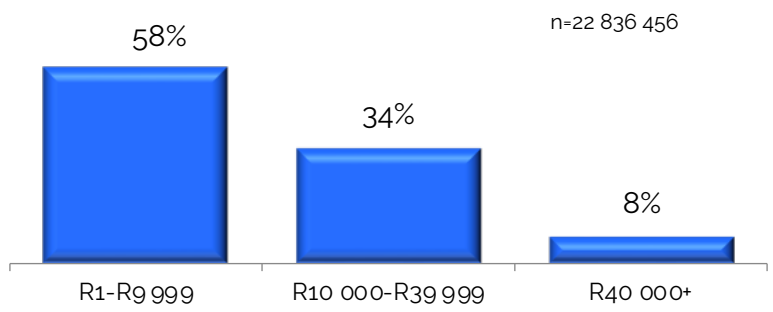
Television



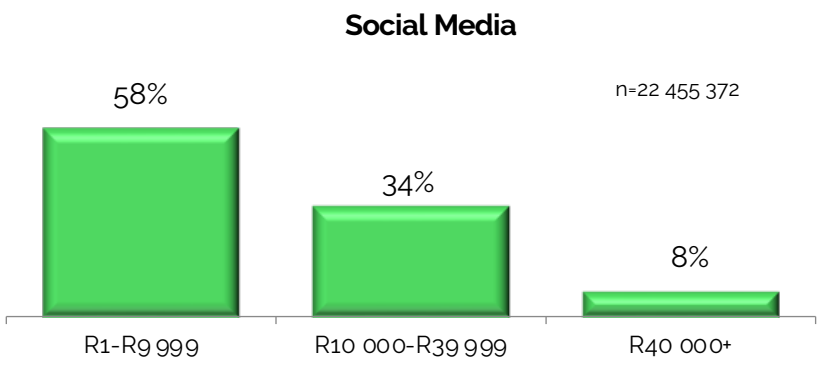
Radio



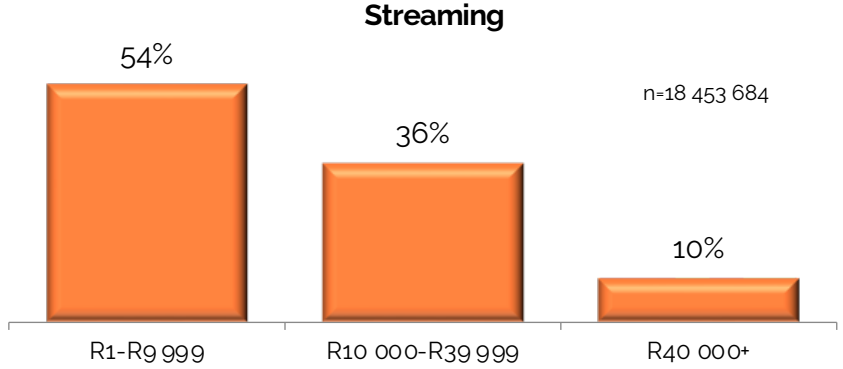
Internet



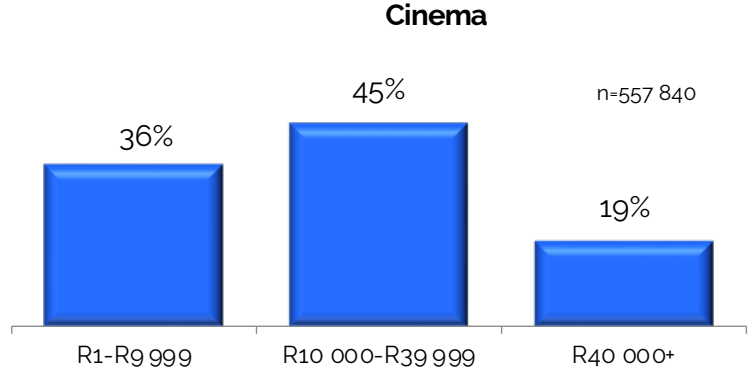
Social Media



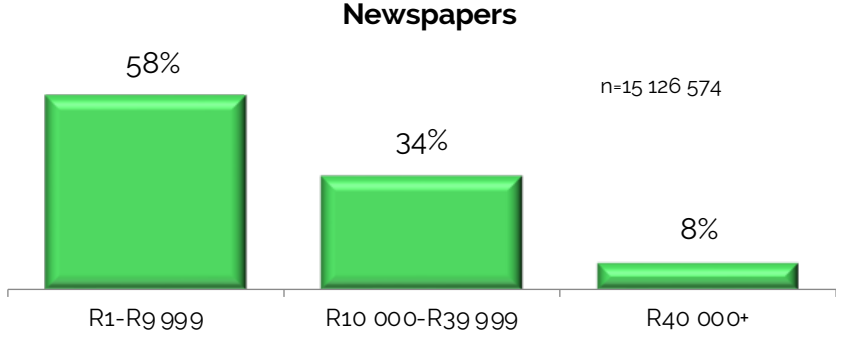
Streaming



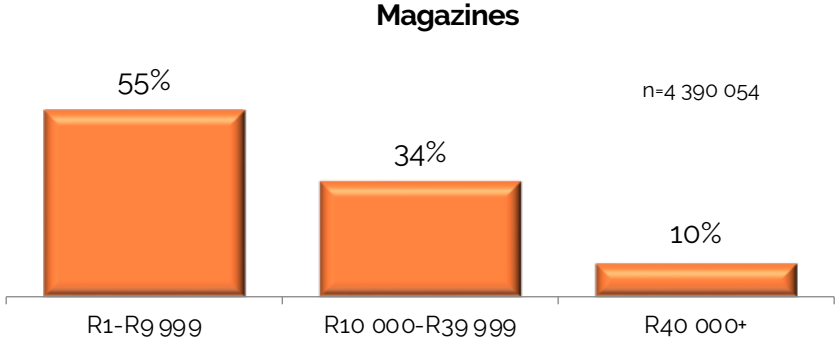
Cinema



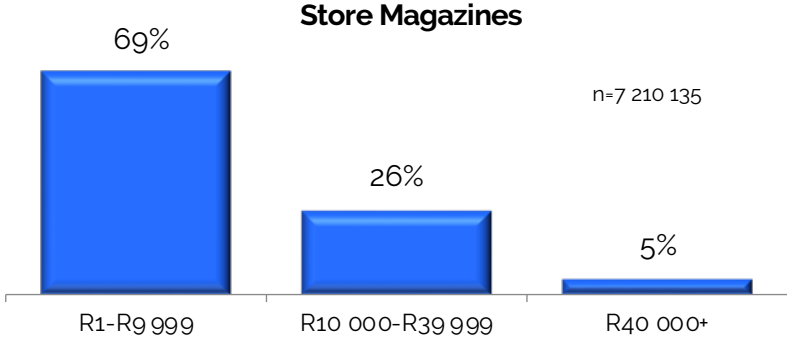
Newspapers



Magazines



Store Magazines



PLUS 94 RESEARCH

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

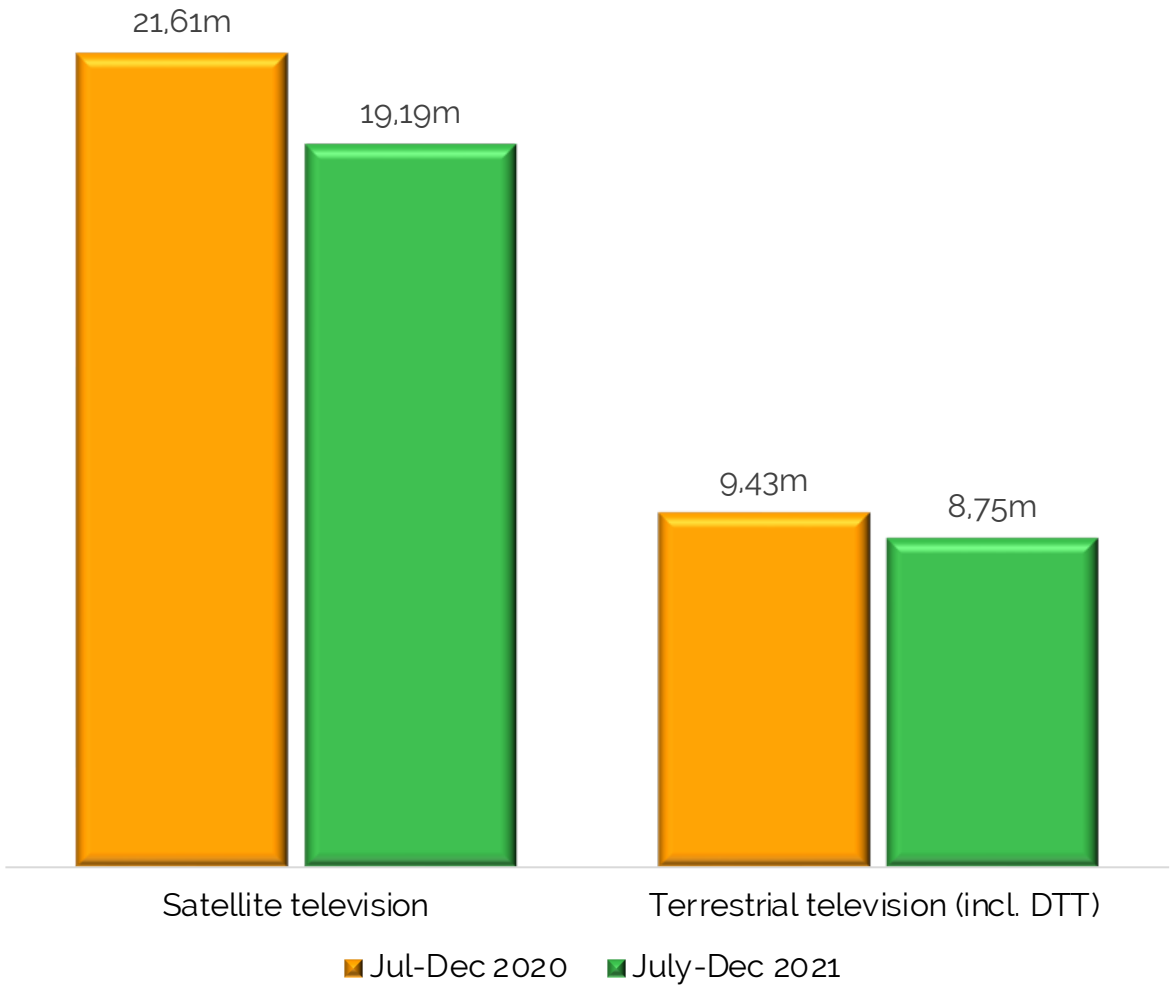
Source: MAPS 2021/2022 (Apr '21 – Mar '22)

Population 15+: 43 085 487

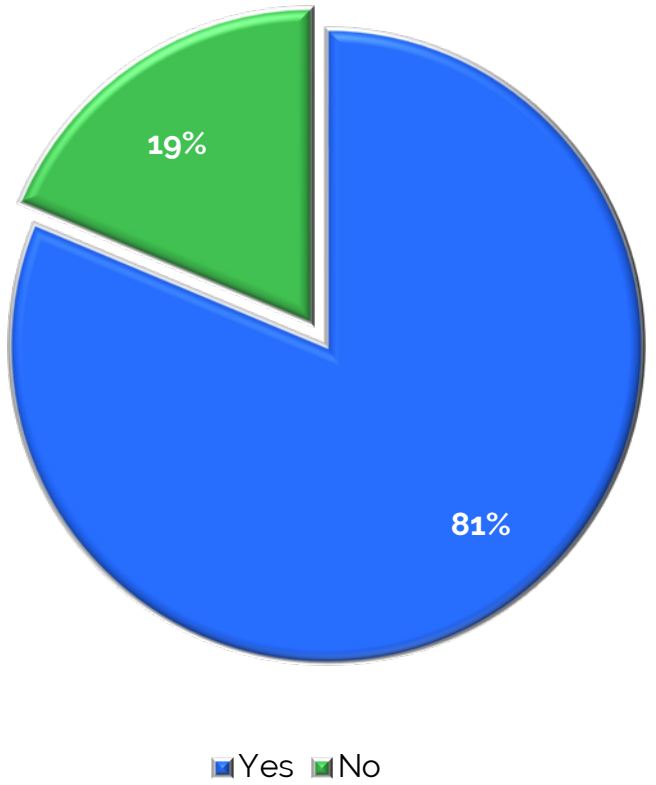
Television & Streaming

TV Landscape

Satellite Television vs. Terrestrial Television



Households with a TV set



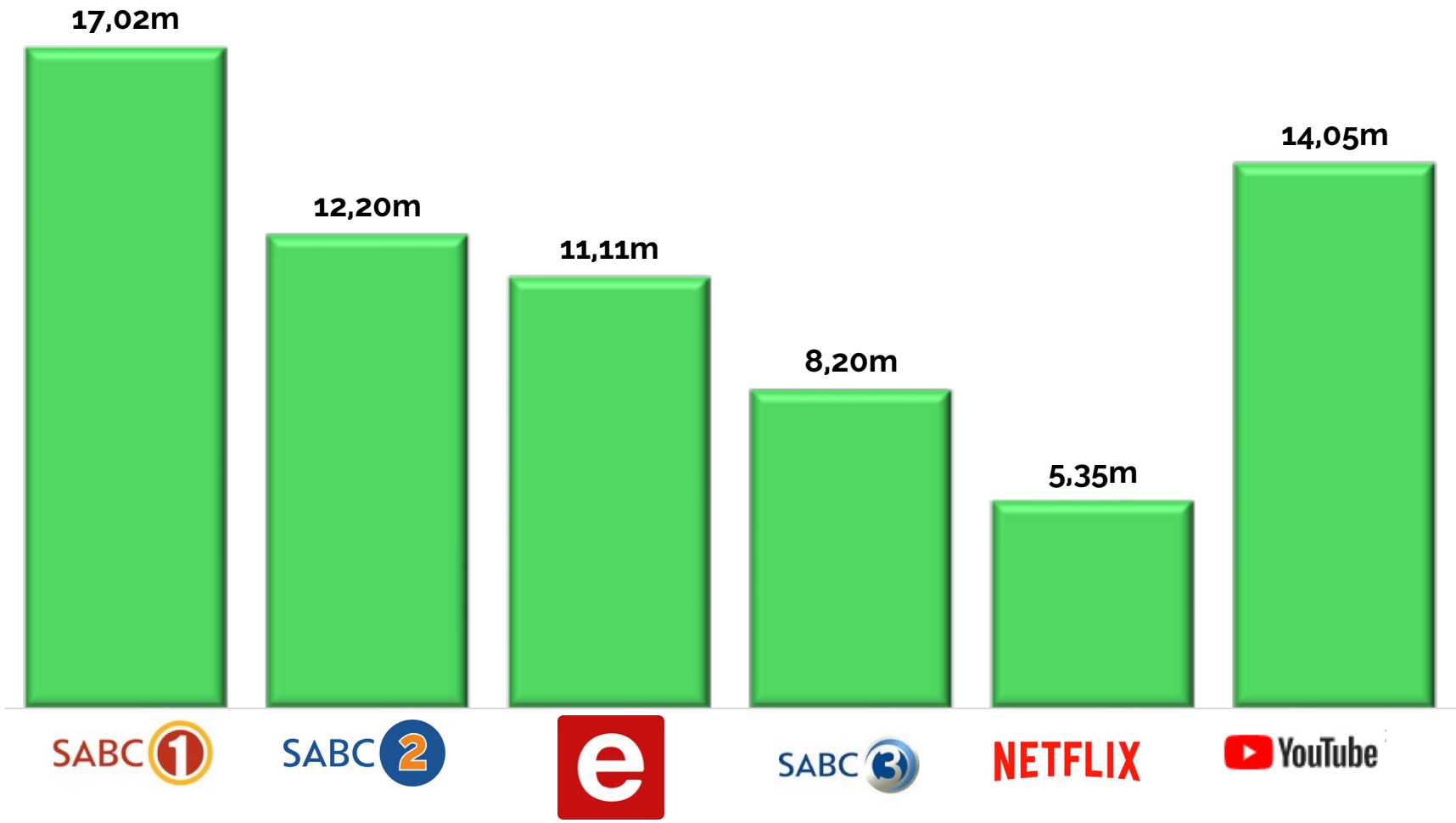
Source: MAPS 2021/2022 (Apr '21 – Mar '22)

Population 15+: 43 085 487

Top Television Channels/Streaming Services P4W

MARKETING RESEARCH FOUNDATION

TV Penetration 72%

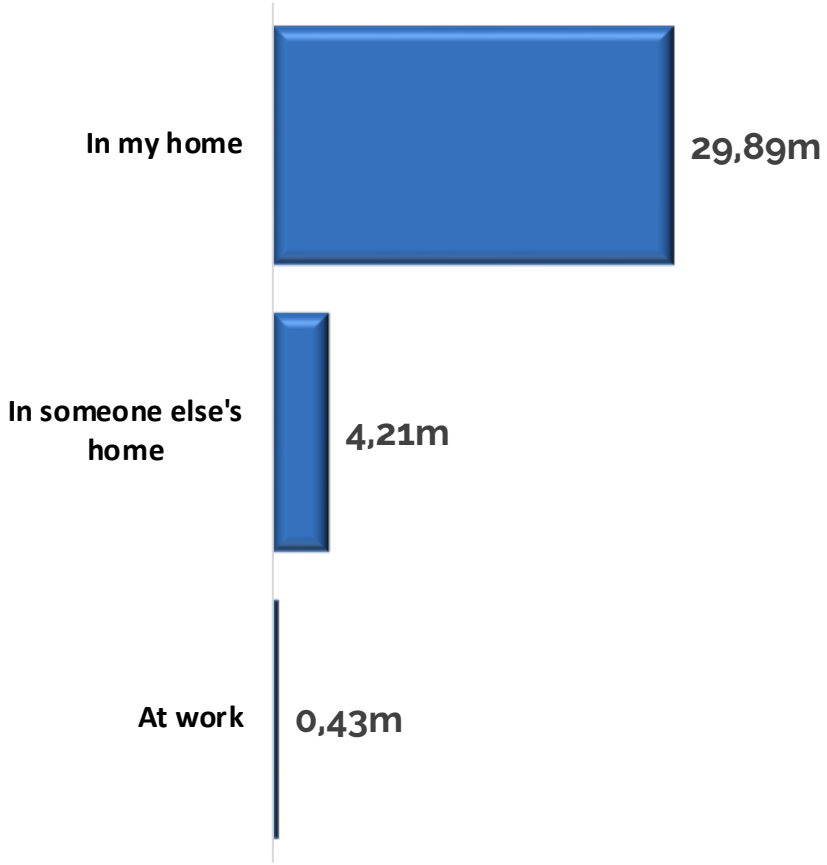


Source: MAPS 2021/2022 (Apr '21 – Mar '22)

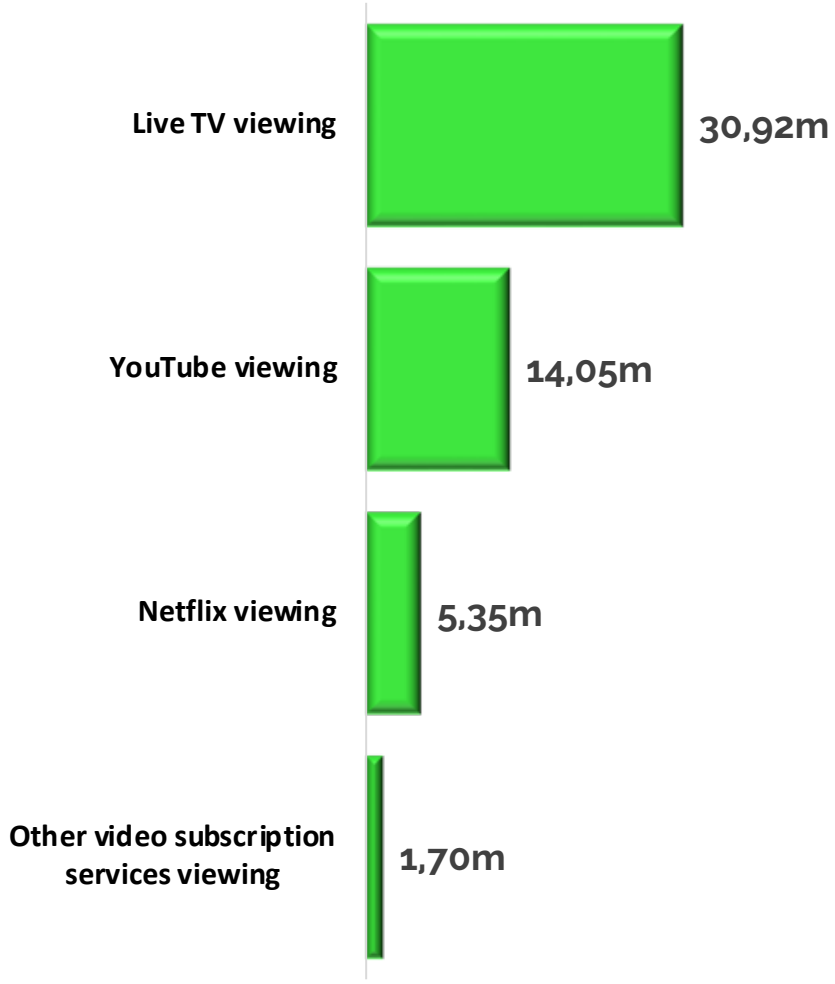
Population 15+: 43 085 487

Behaviour: Television

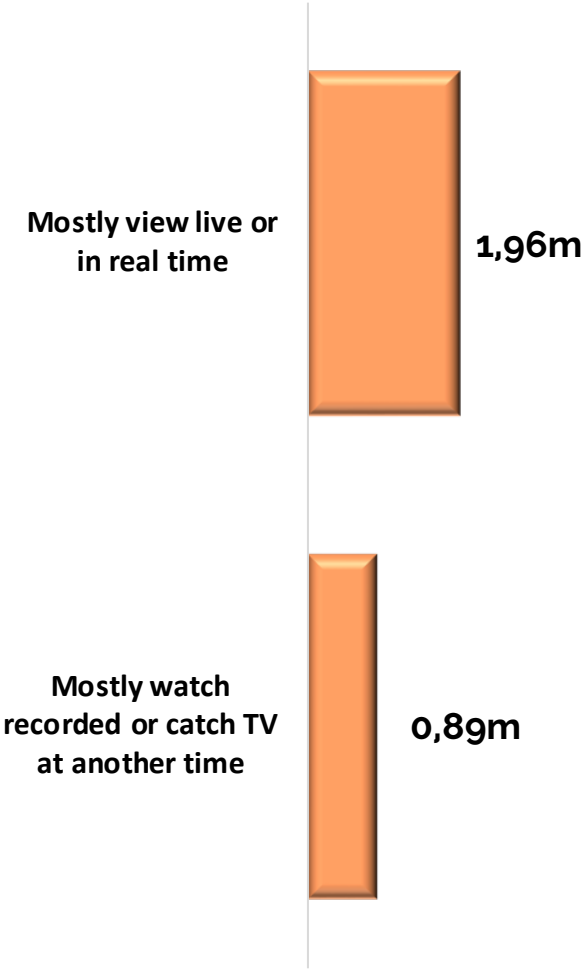
Top TV viewing location: Past 7 days



Live TV vs. Streaming Services: P4W



PVR: Usual mode for watching TV programmes

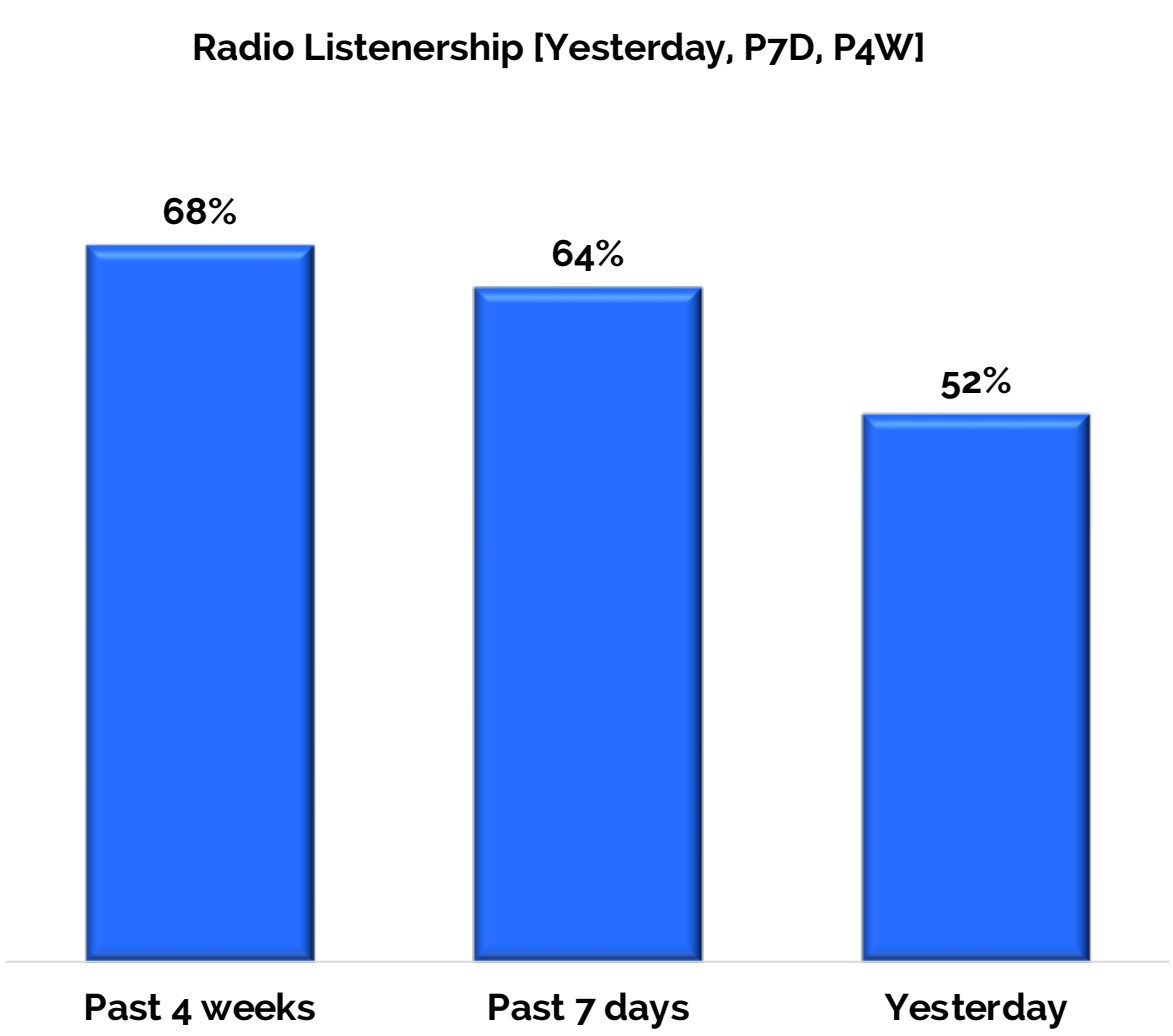


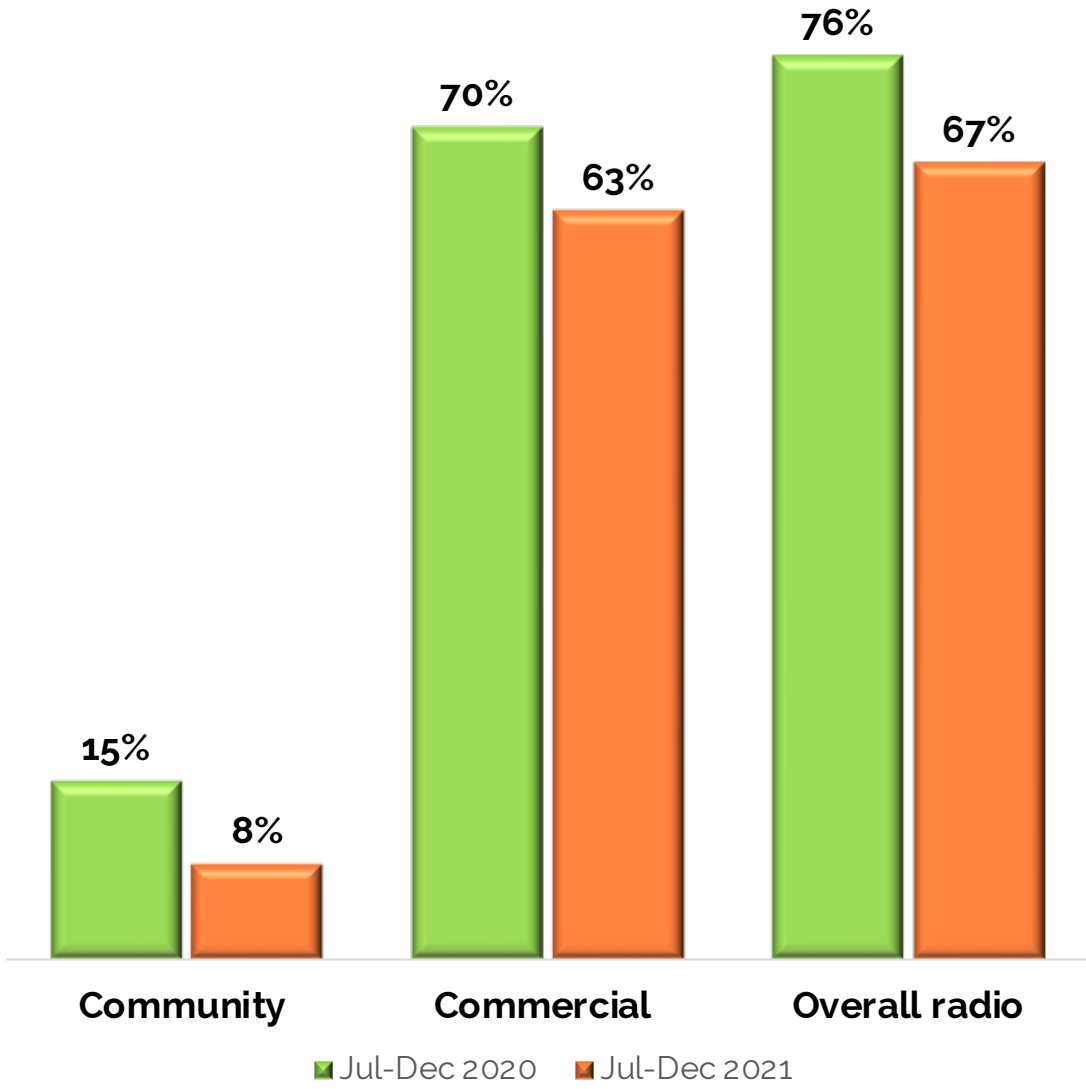
Source: MAPS 2021/2022 (Apr '21 – Mar '22)

Population 15+: 43 085 487

Radio

Radio Listenership





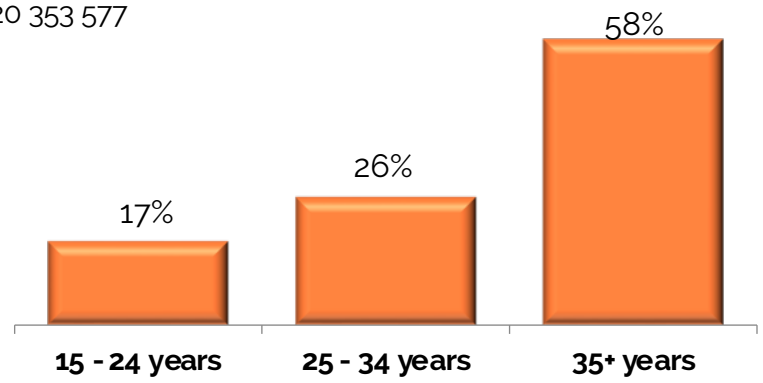
Source: MAPS 2021/2022 (Apr '21 – Mar '22)

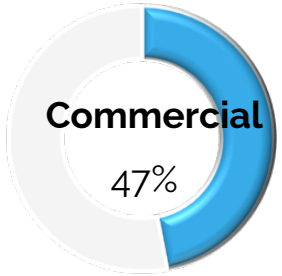
Population 15+: 43 085 487

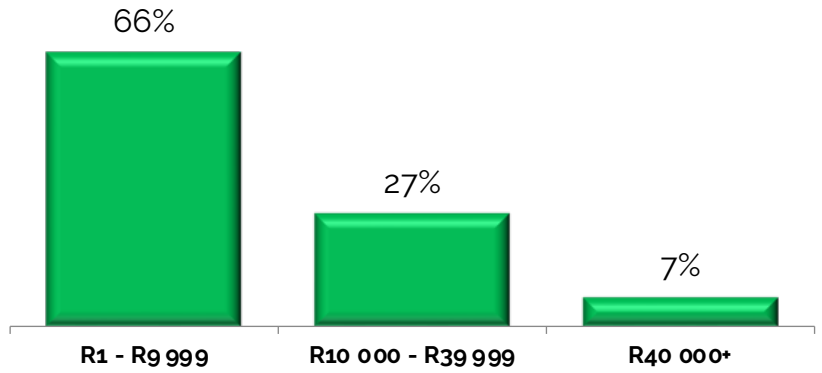
Radio Reach - Yesterday

Total Reach 52%

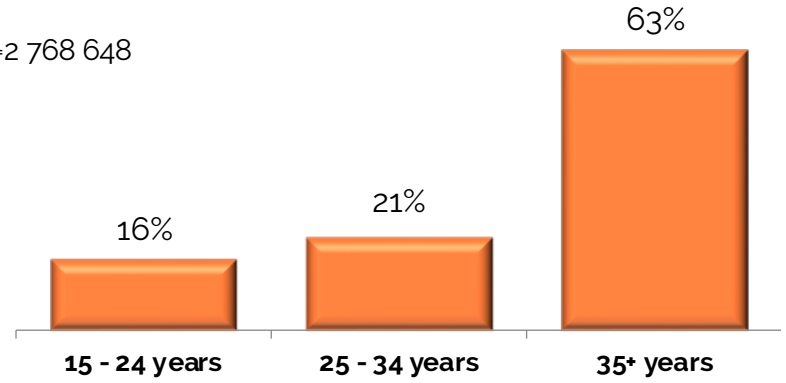
n=20 353 577

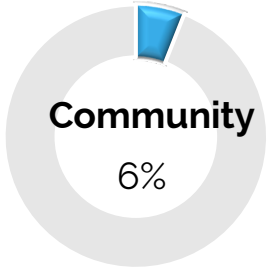


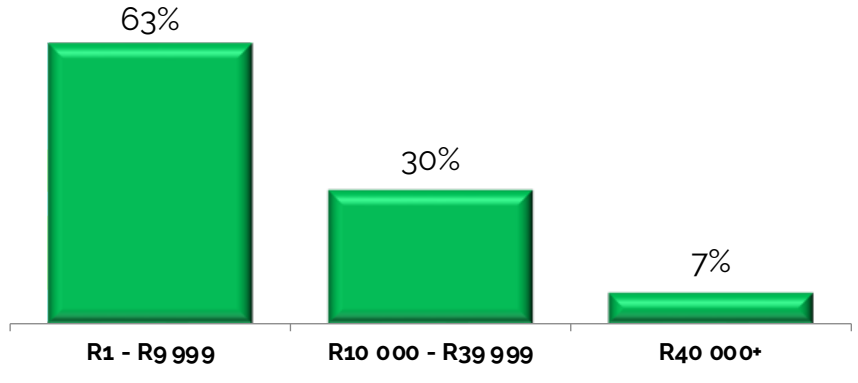




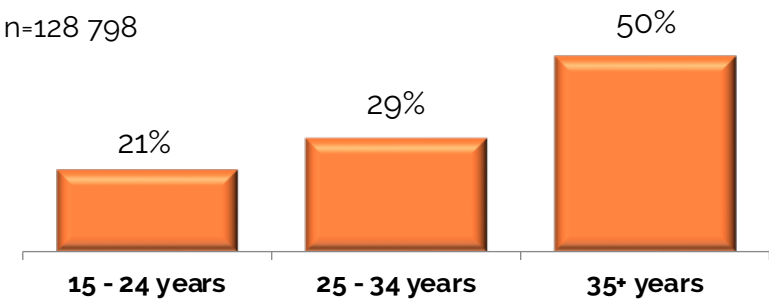
n=2 768 648

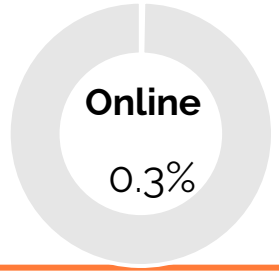


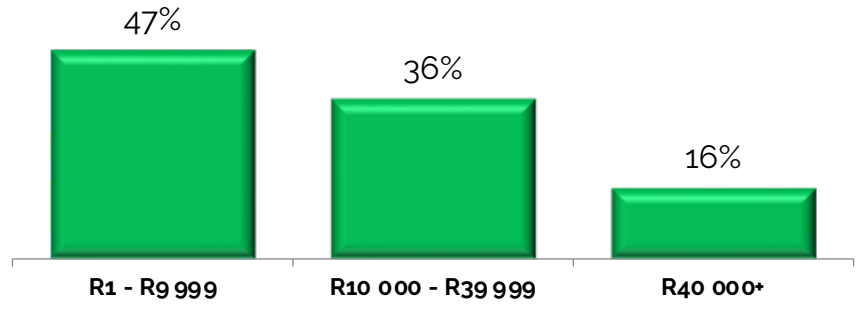




n=128 798







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

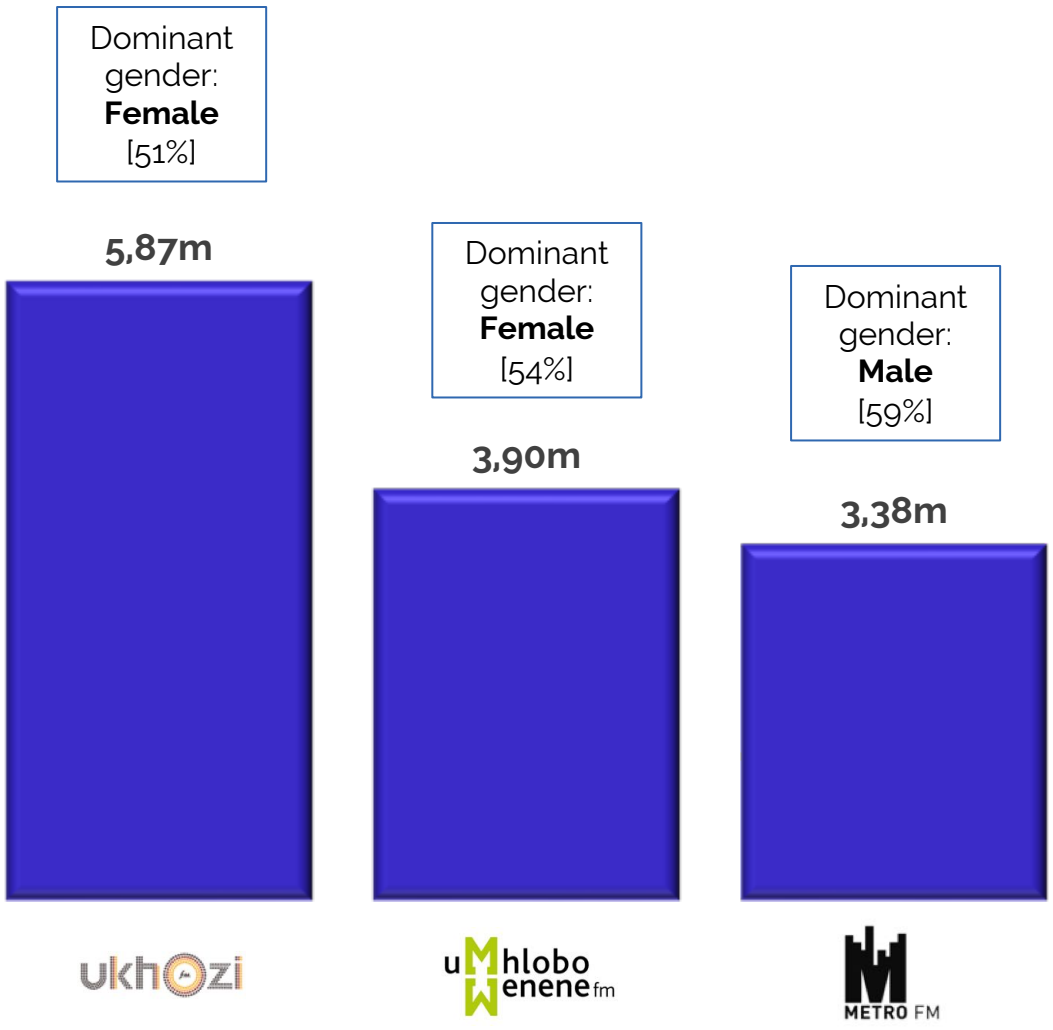
Source: MAPS 2021/2022 (Apr '21 – Mar '22)

Population 15+: 43 085 487

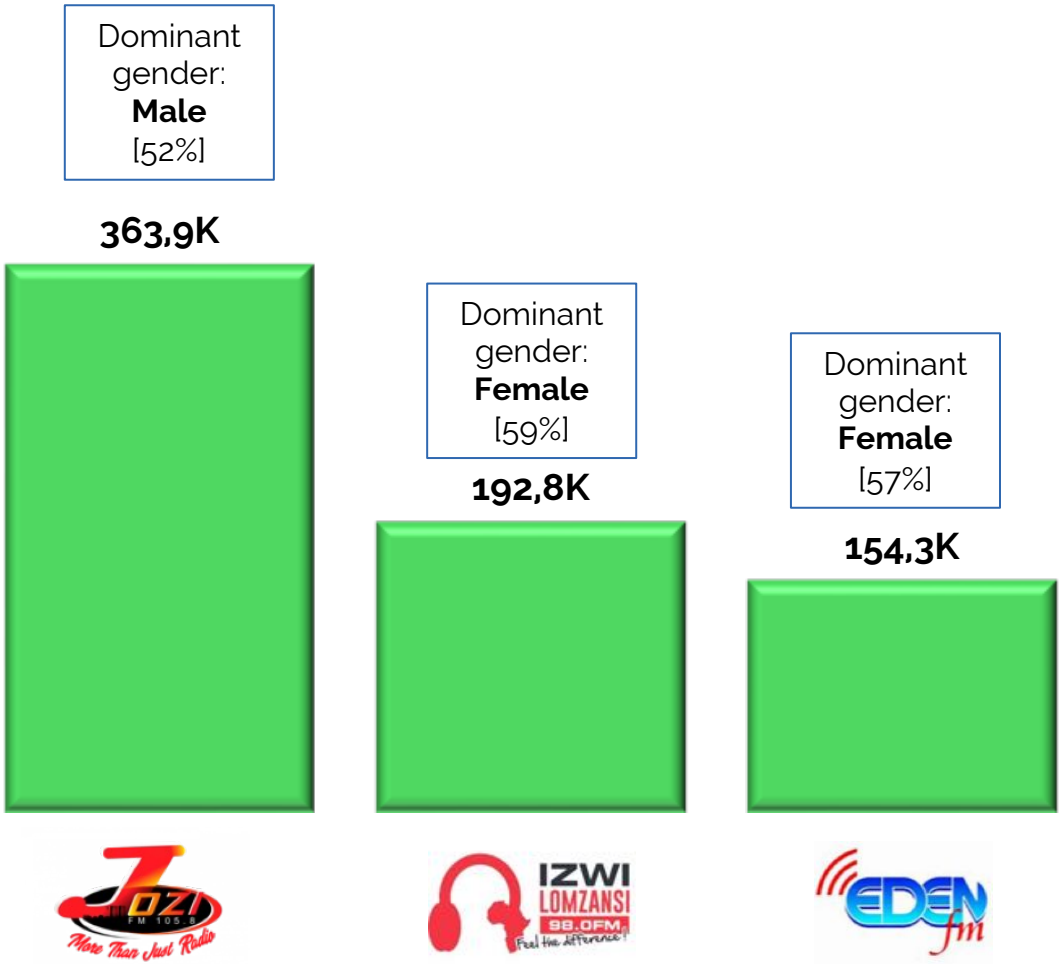
Top Radio Stations Listened to P4W

MARKETING RESEARCH FOUNDATION

Overall Radio



Community Radio



Print Media

Readership Trends P3M

MARKETING RESEARCH FOUNDATION

2020|2021

2020: 36% [15 513 269] of respondents read a **daily newspaper**

2021: 26% [11 215 785] of respondents read a **daily newspaper**

2020|2021

2020: 3% [1 366 190] of respondents read a **twice weekly newspaper**

2021: 2% [991 391] of respondents read a **twice weekly newspaper**

2020|2021

2020: 3% [1 463 201] of respondents read a **weekly newspaper**

2021: 1% [549 879] of respondents read a **weekly newspaper**

2020|2021

2020: 6% [2 426 905] of respondents read a **weekend newspaper**

2021: 3% [1 312 411] of respondents read a **weekend newspaper**

Newspapers

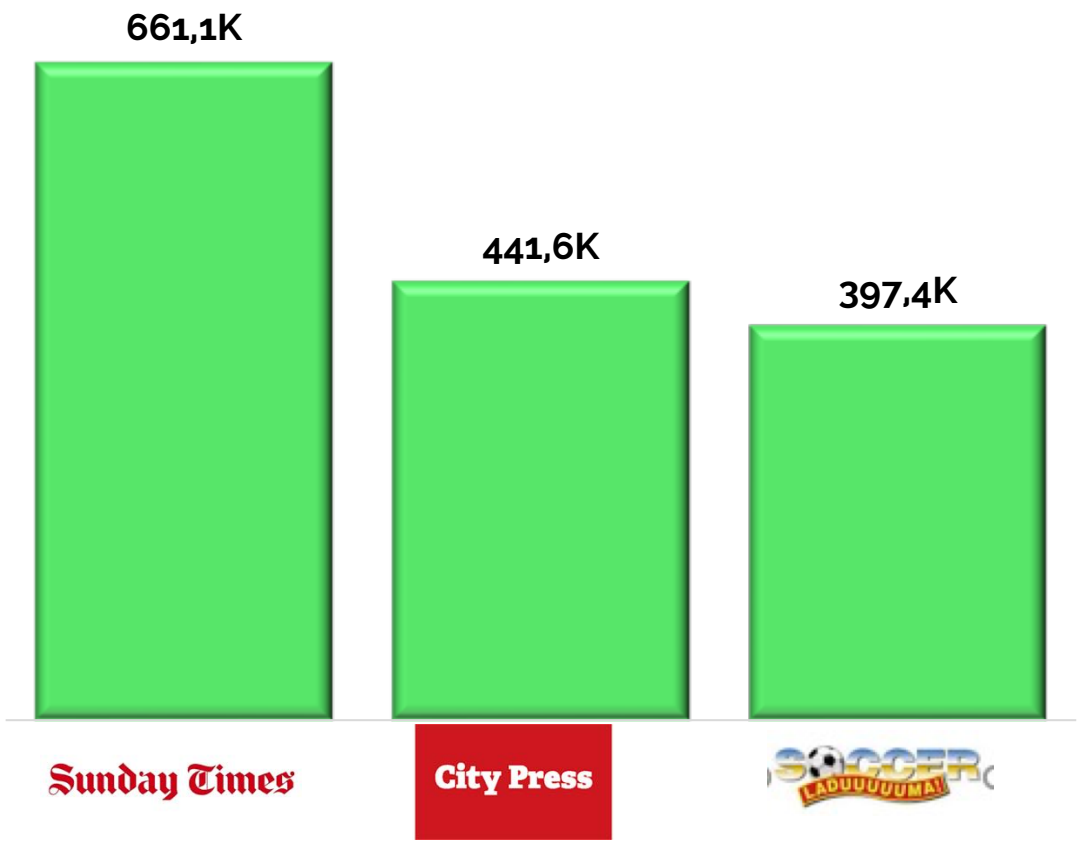
Top Newspapers Read - P3M

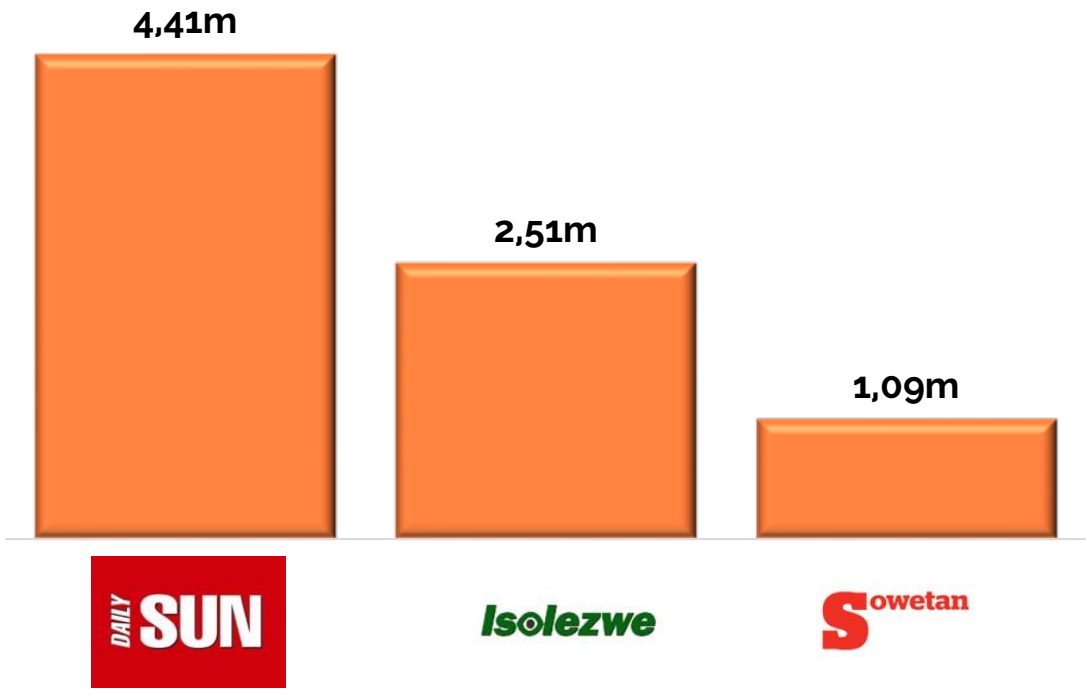
MARKETING RESEARCH FOUNDATION

Weekly Newspapers

37% respondents have read newspapers in the past 3 months.

Daily Newspapers





PLUS 94 RESEARCH

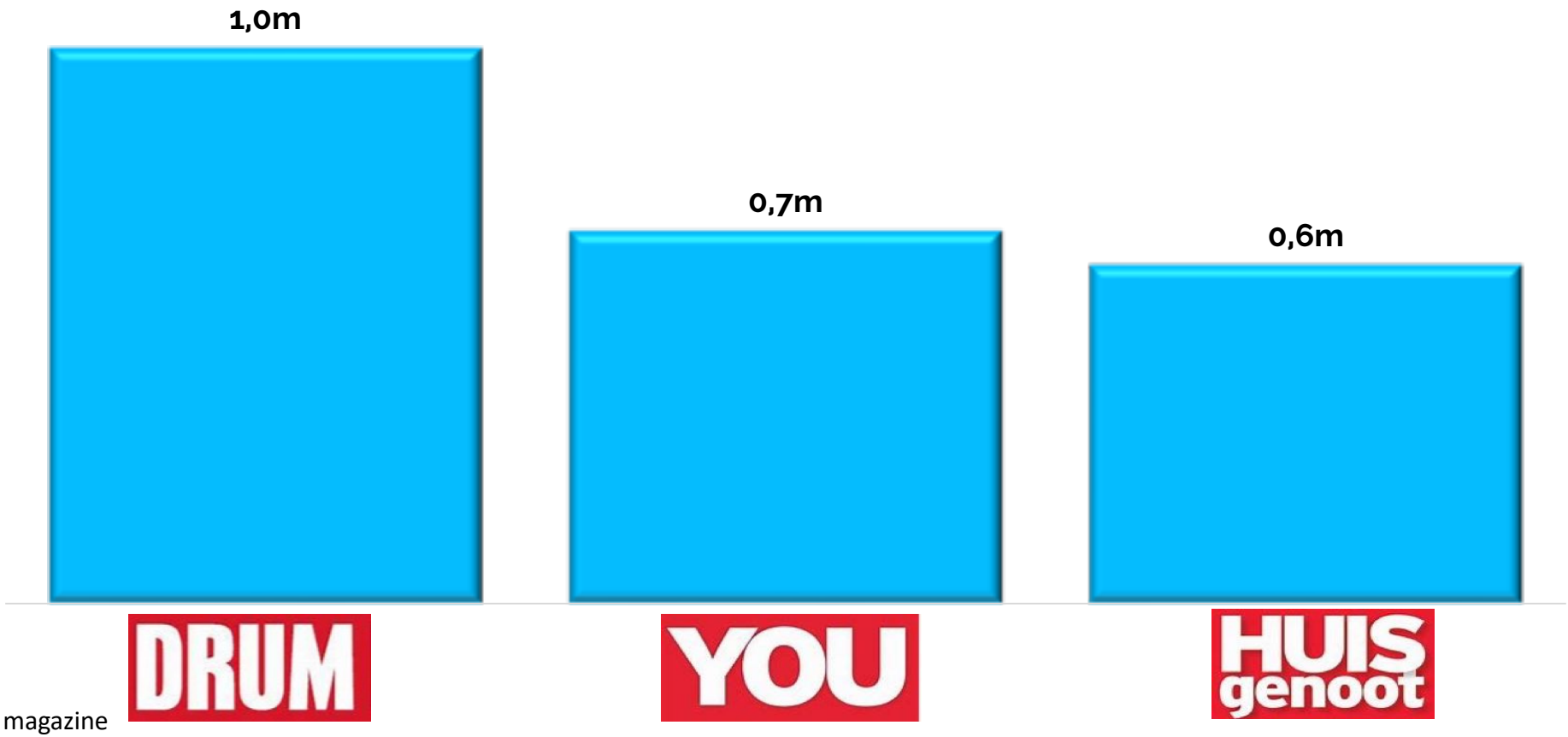
Source: MAPS 2021/2022 (Apr '21 – Mar '22)

Population 15+: 43 085 487

Magazines

Top 3 Magazines Read - P3M

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

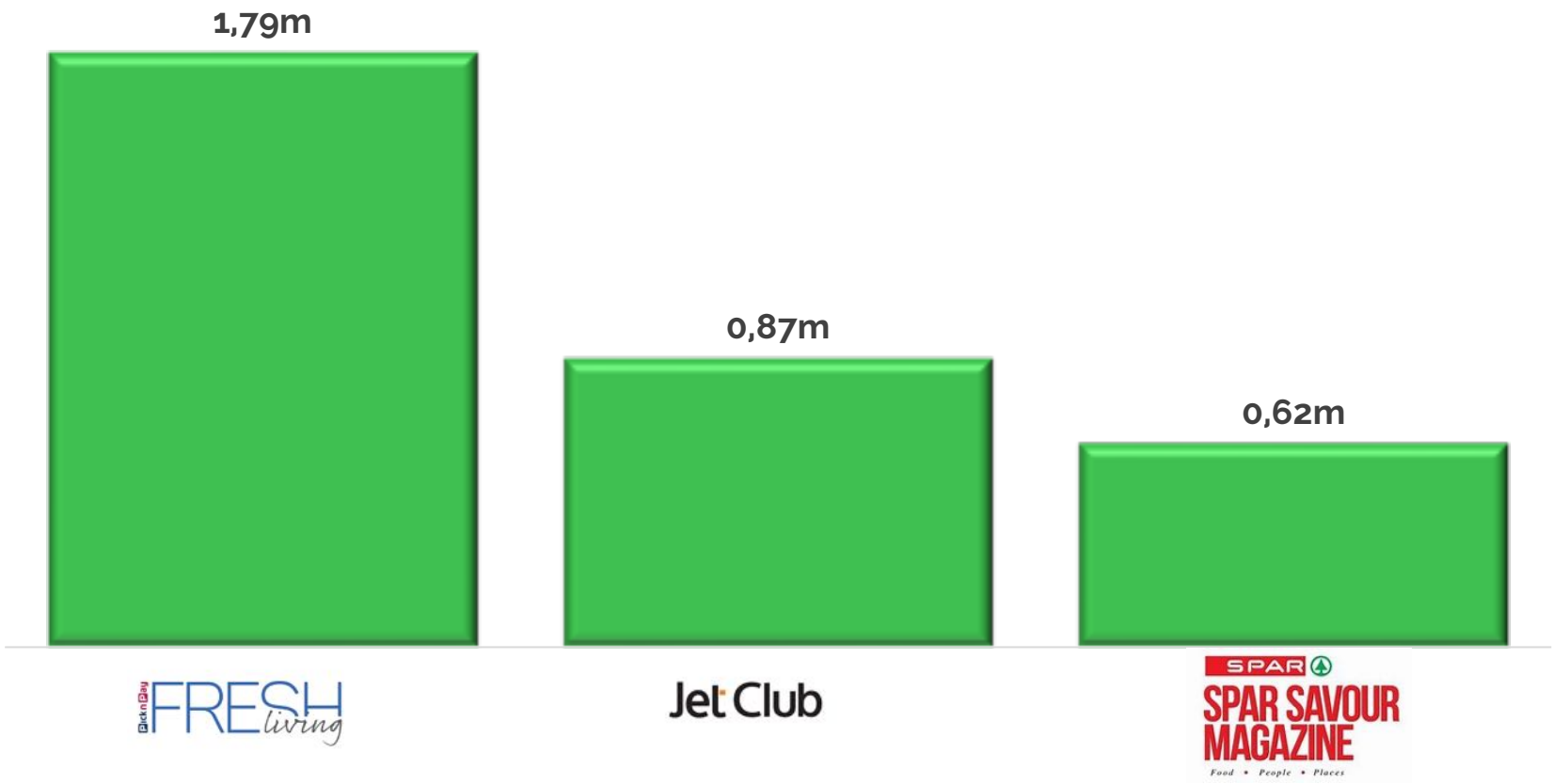


Note: DRUM is an online magazine

Store Magazines

Top 3 Store Magazines Read – P3M

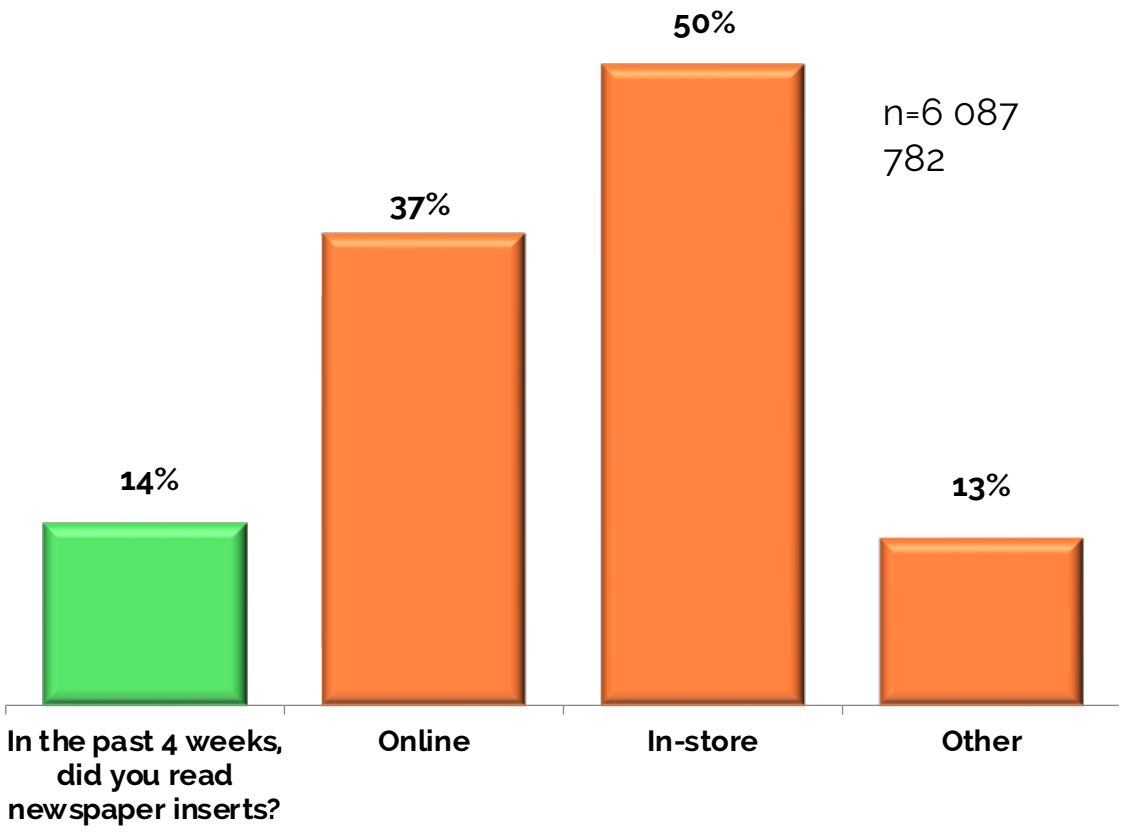
18% respondents have read store magazines in the past 3 months.



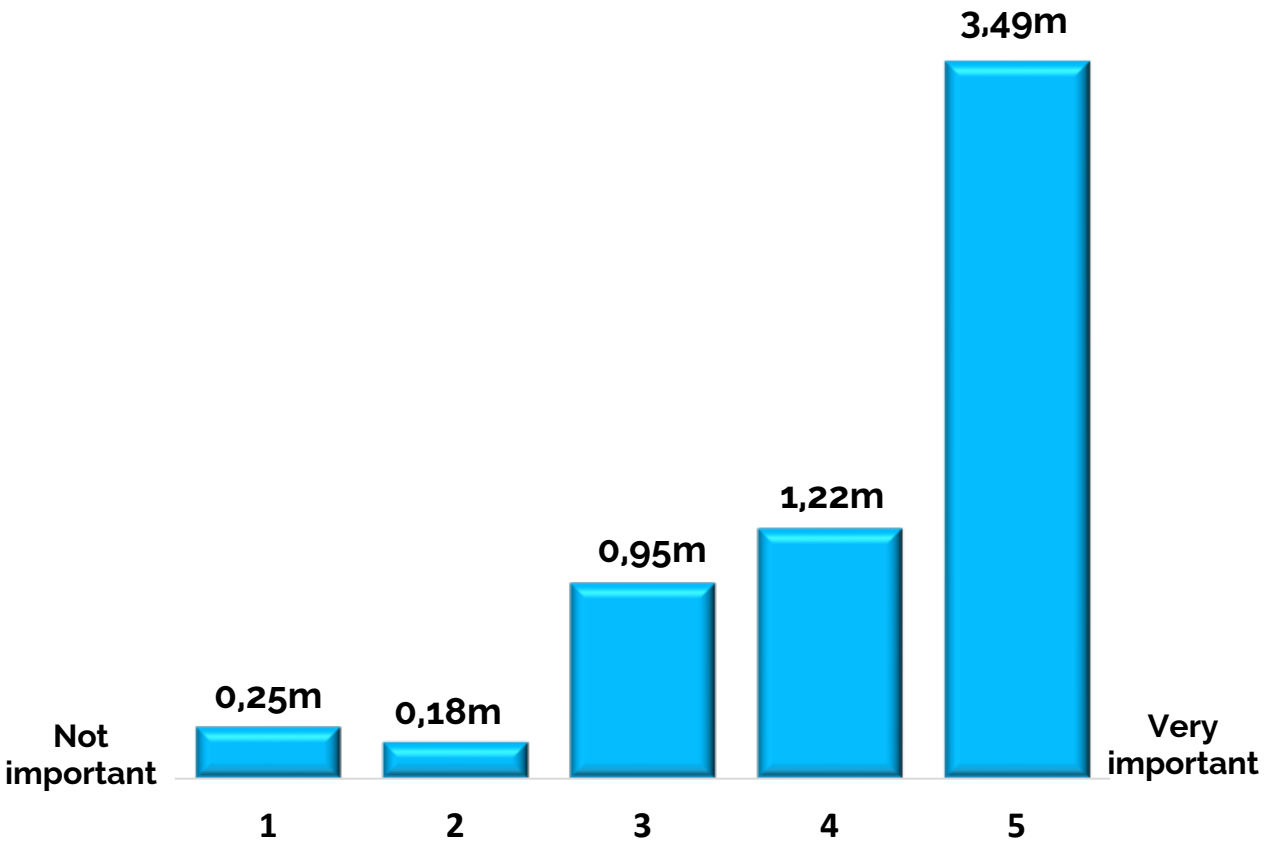
Newspaper Inserts

Newspaper Inserts Read P4W

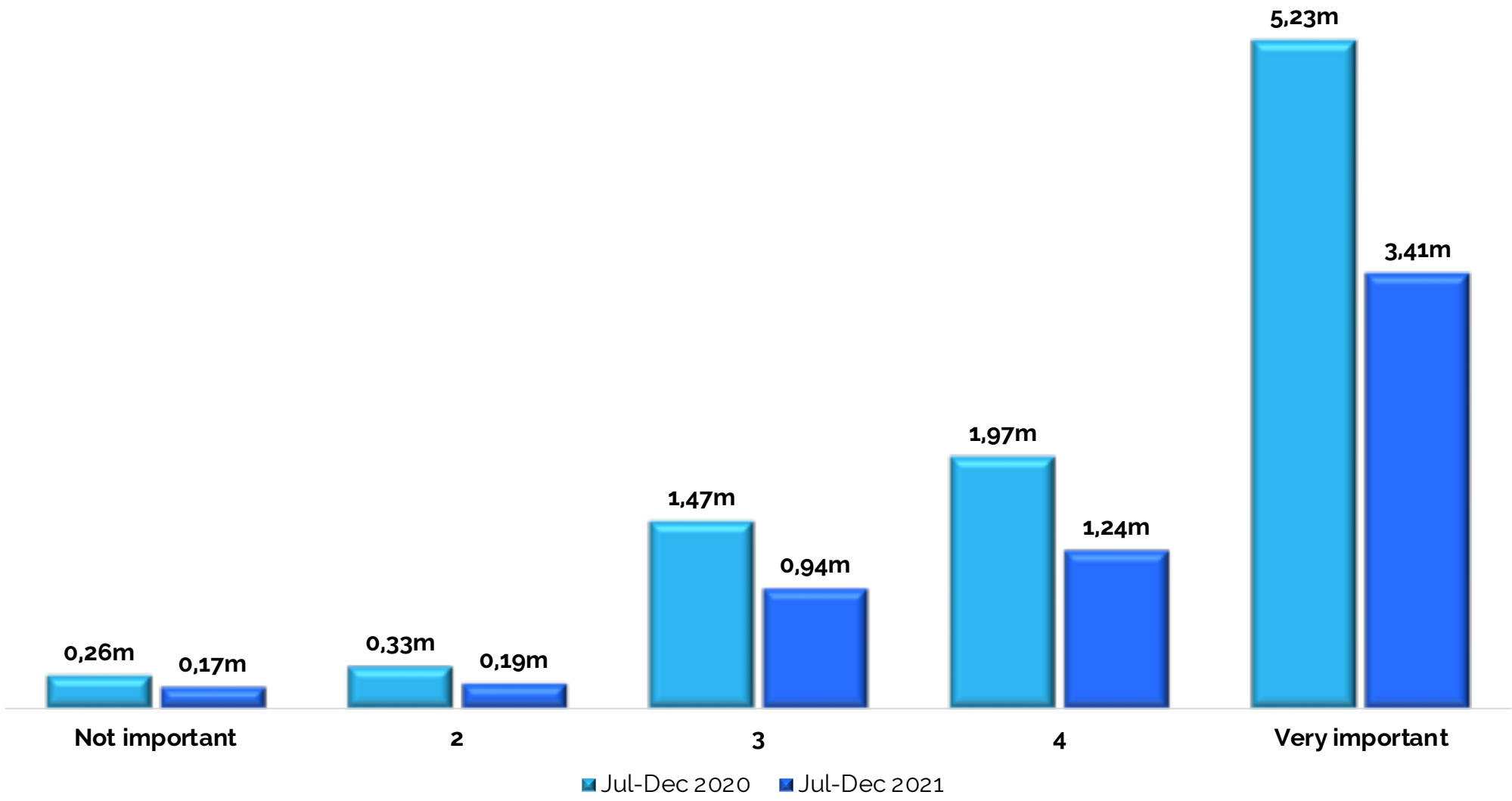
Is there another method of finding the information that you prefer?



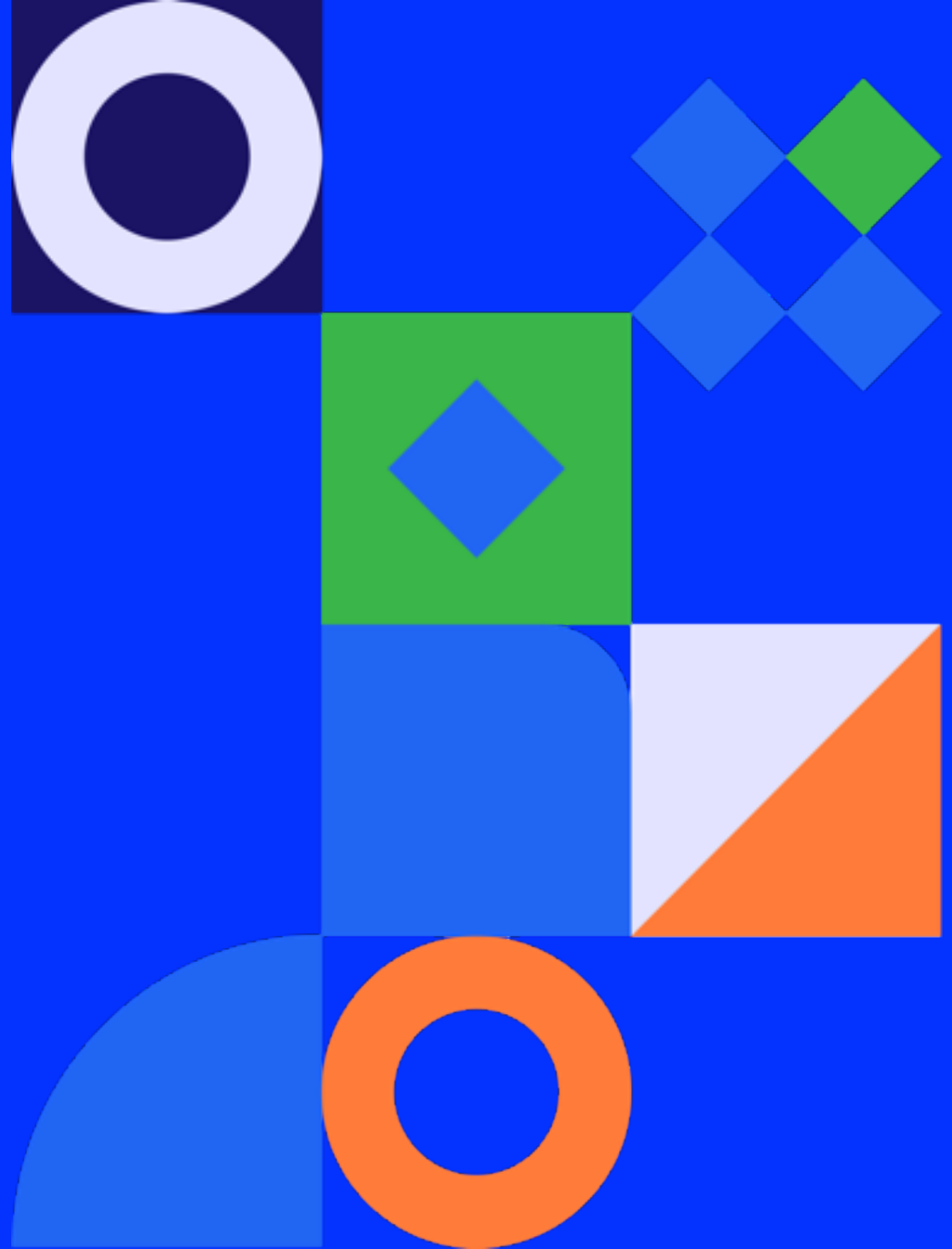
Importance of the information in inserts in defining your shopping list?



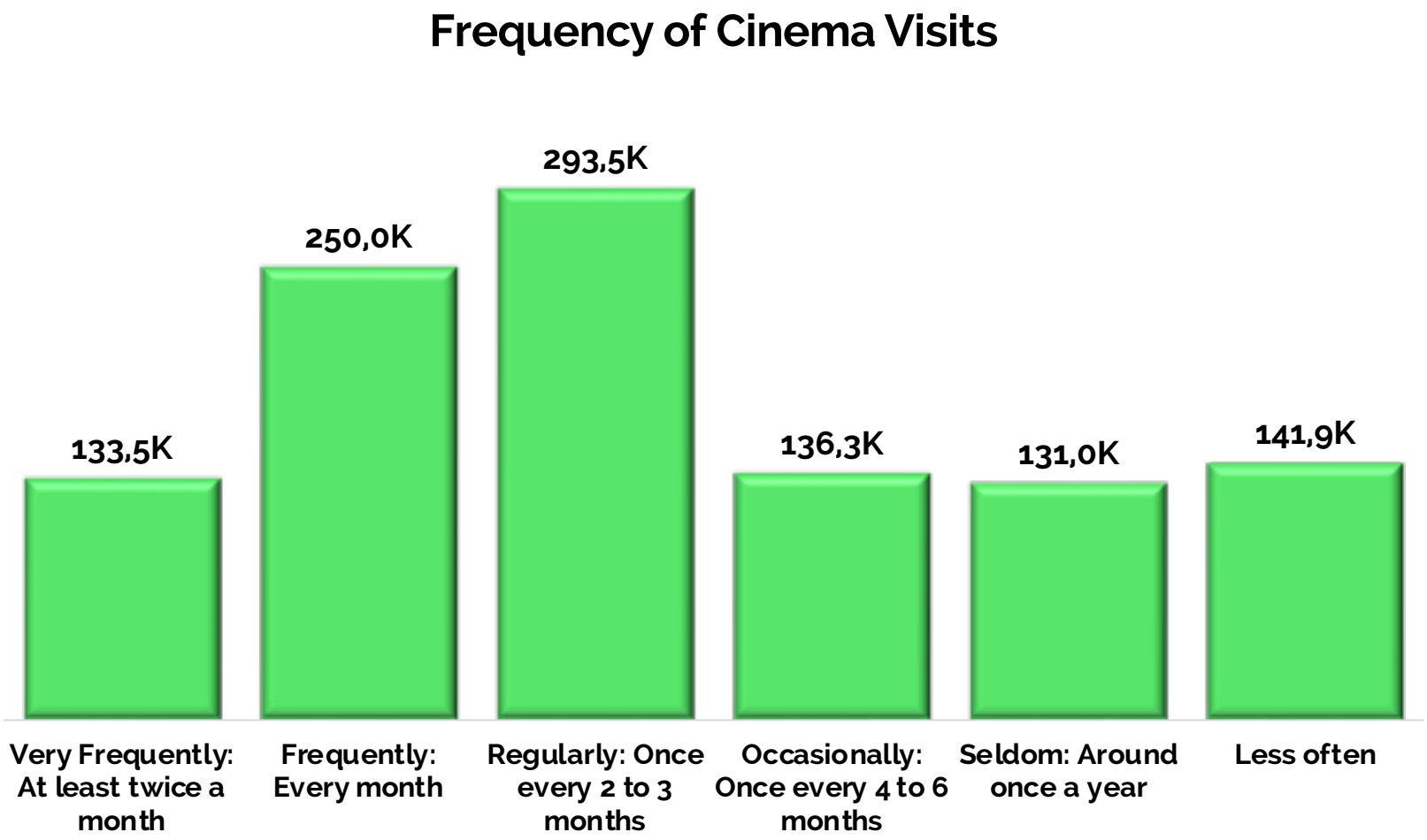
Newspaper Insert Importance Trend



Cinema



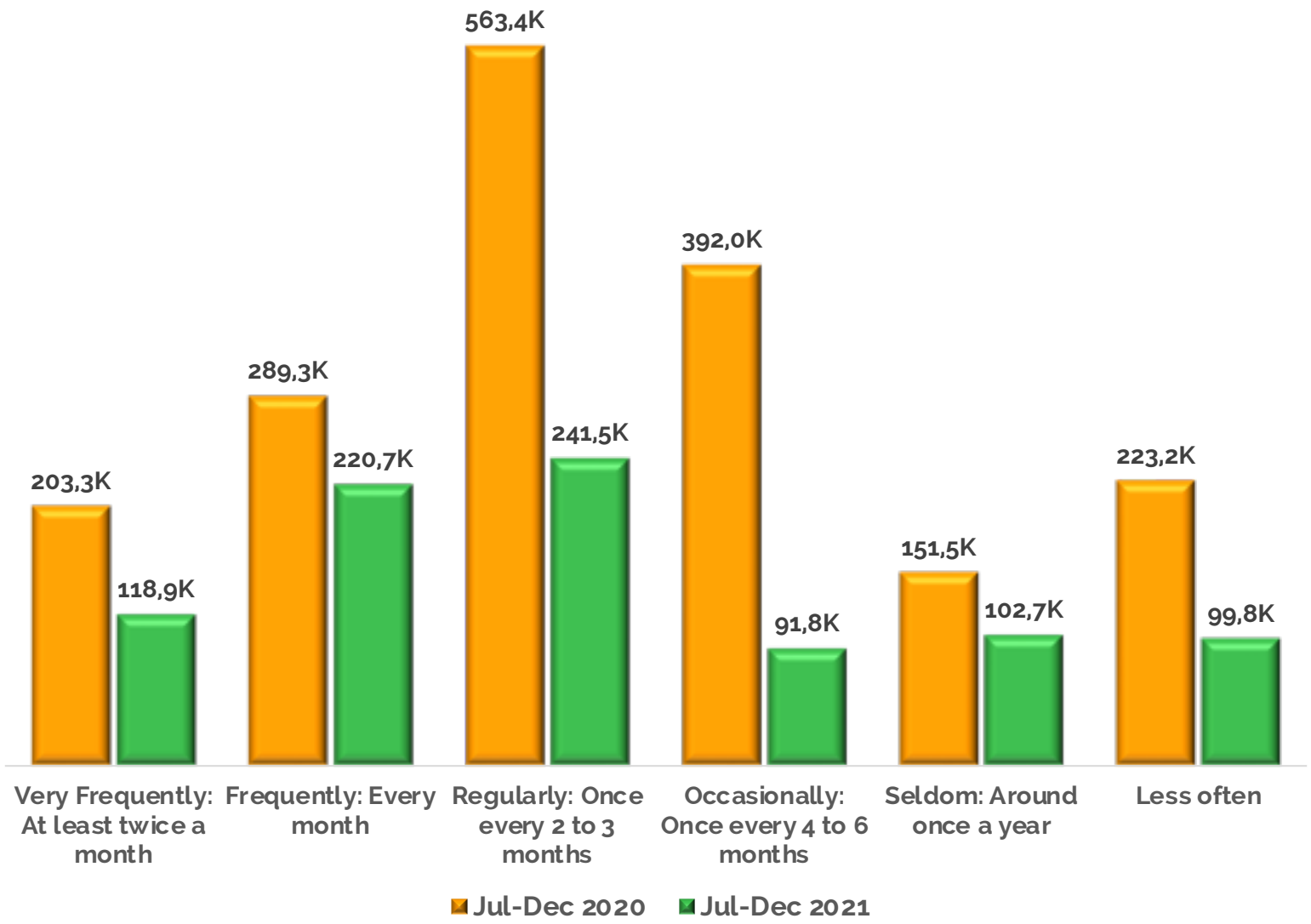
Cinema Visits



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

The average cinema outing cost = R423

Cinema shifts [Jul-Dec '20 vs. Jul-Dec '21]



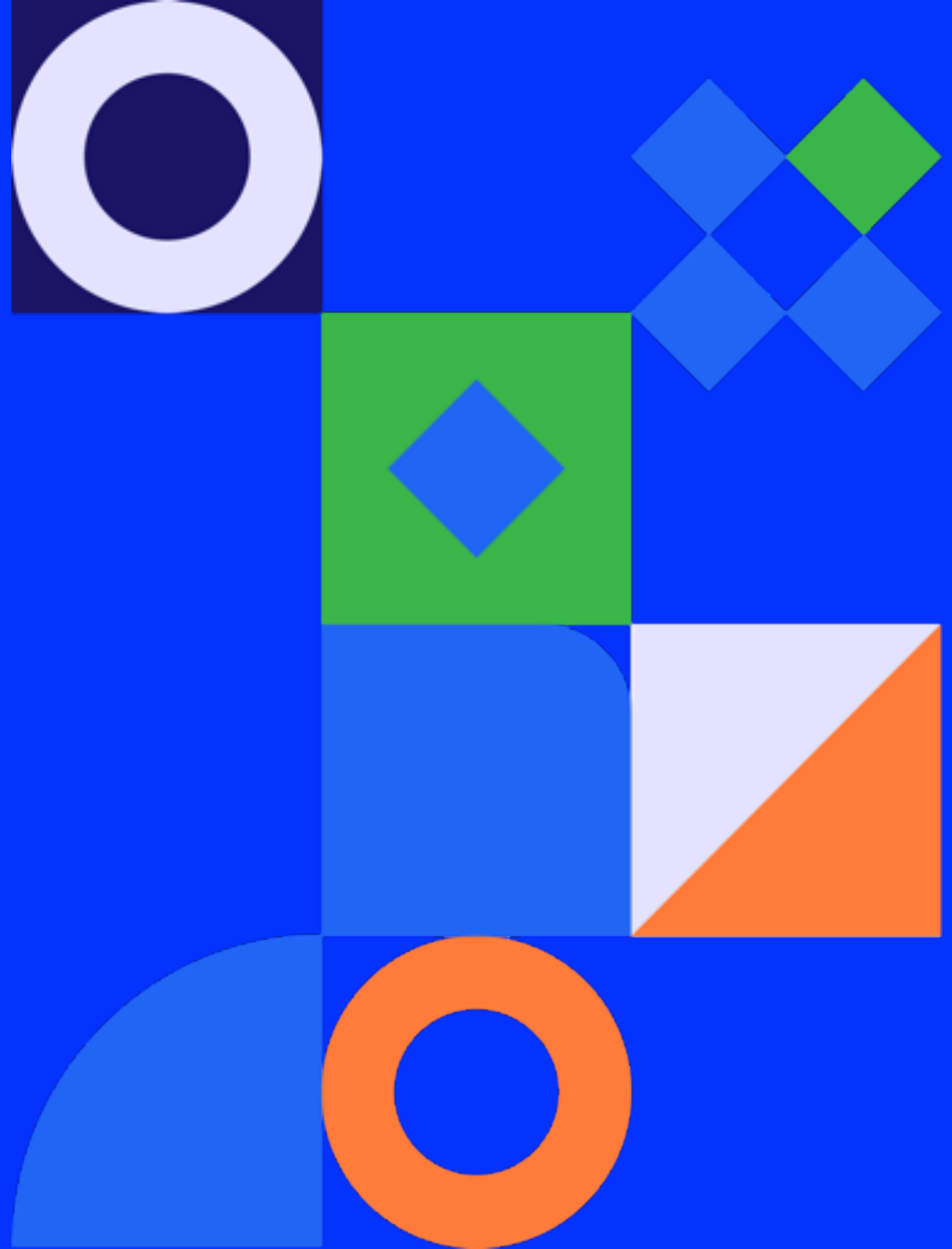
Average no. of people that go out on each cinema outing
2020|2021
3 | 3

Average cinema outing cost
2020|2021
R347 | R425

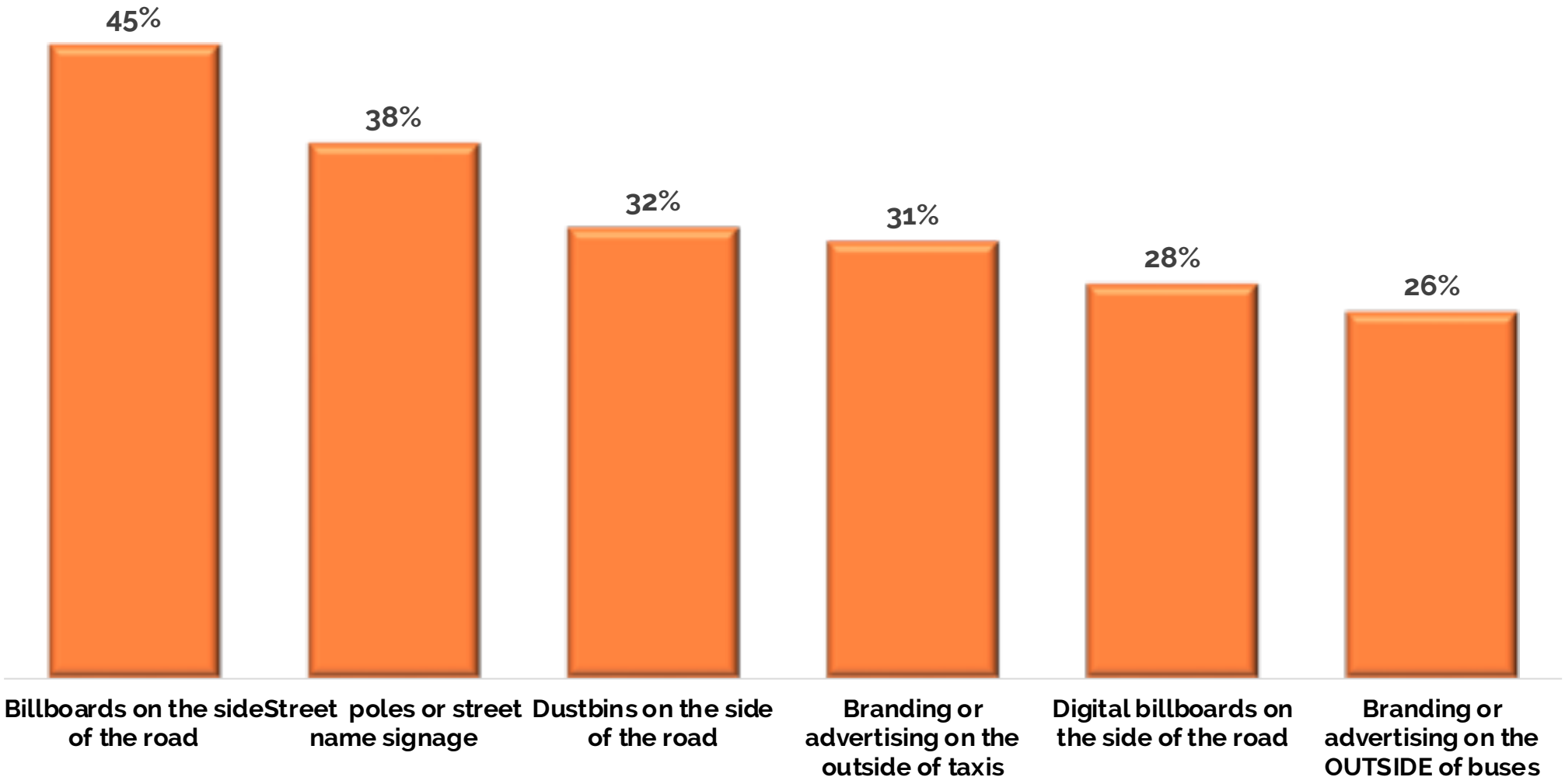
Source: MAPS 2021/2022 (Apr '21 – Mar '22)

Population 15+: 43 085 487

Out of Home



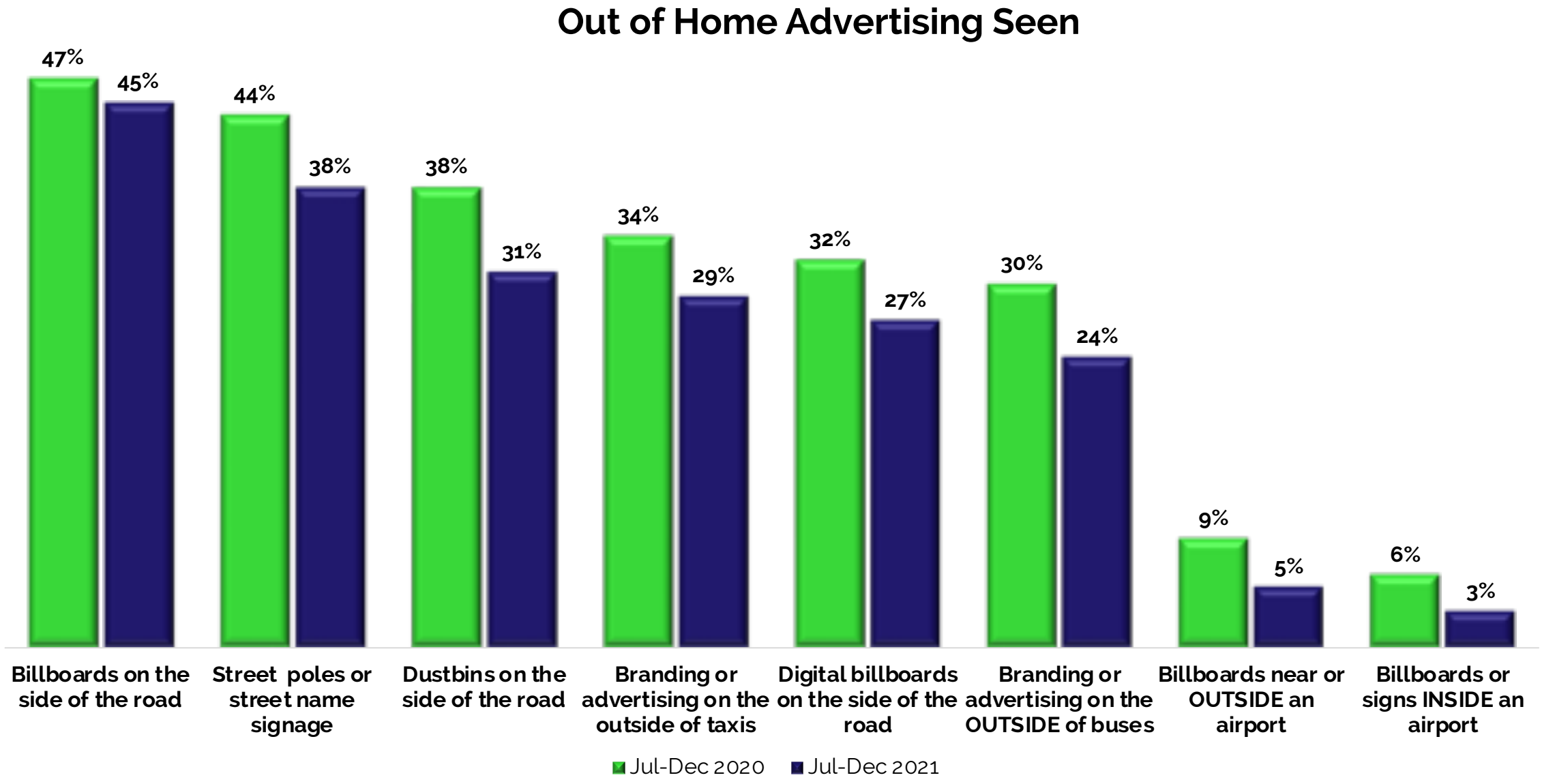
Out Of Home - P4w – Share of Sight



Source: MAPS 2021/2022 (Apr '21 – Mar '22)

Population 15+: 43 085 487

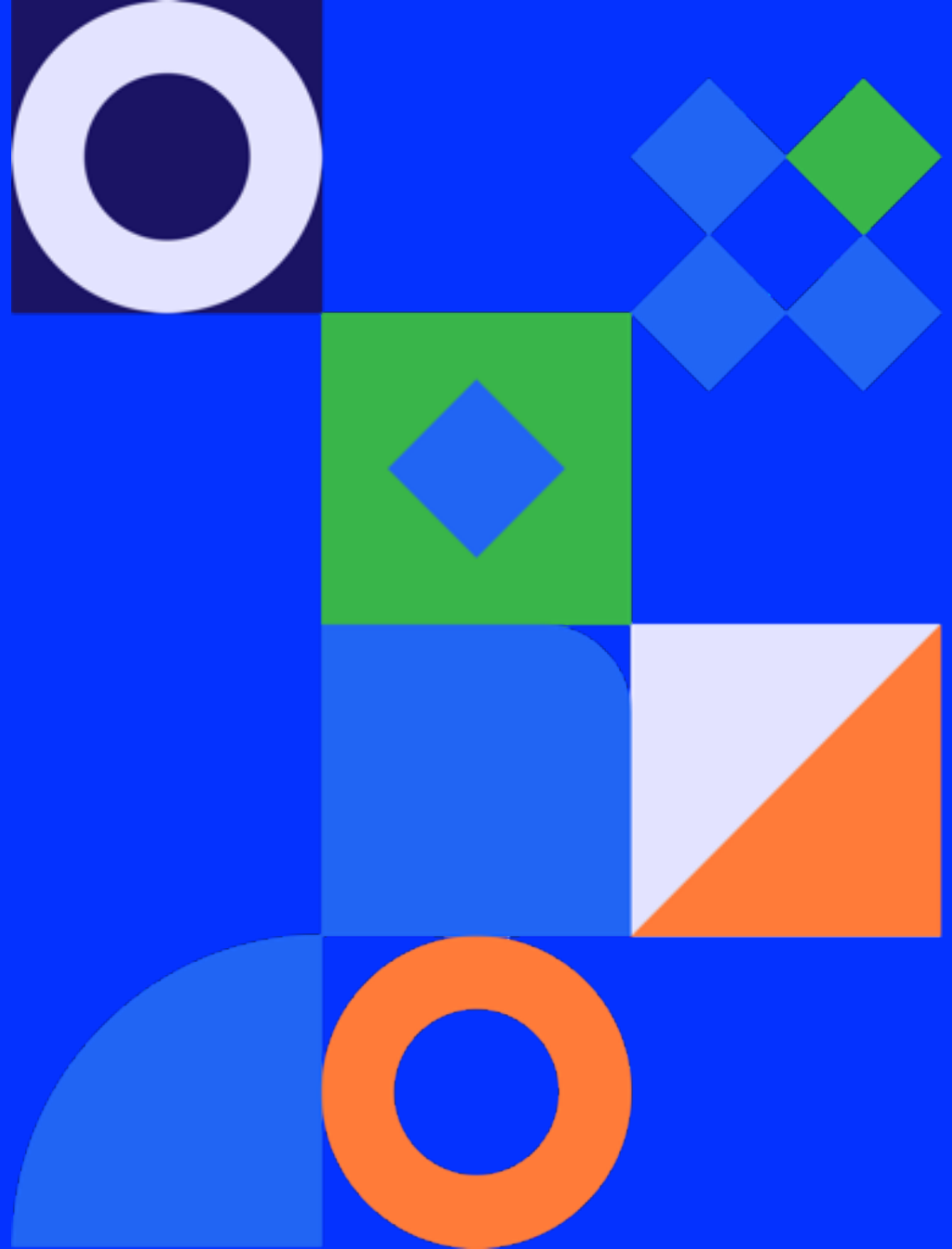
Out of Home Shifts



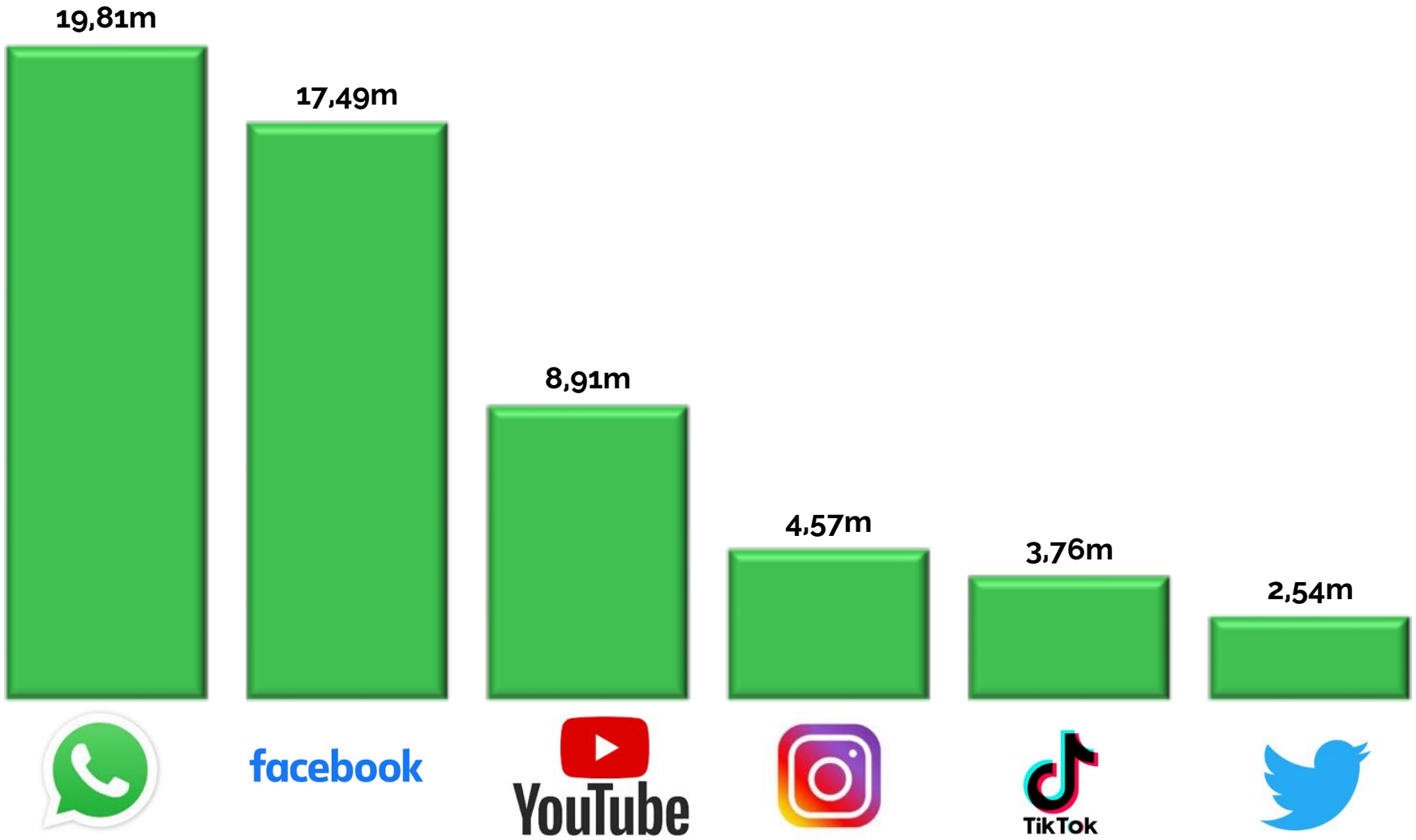
Source: MAPS 2021/2022 (Apr '21 – Mar '22)

Population 15+: 43 085 487

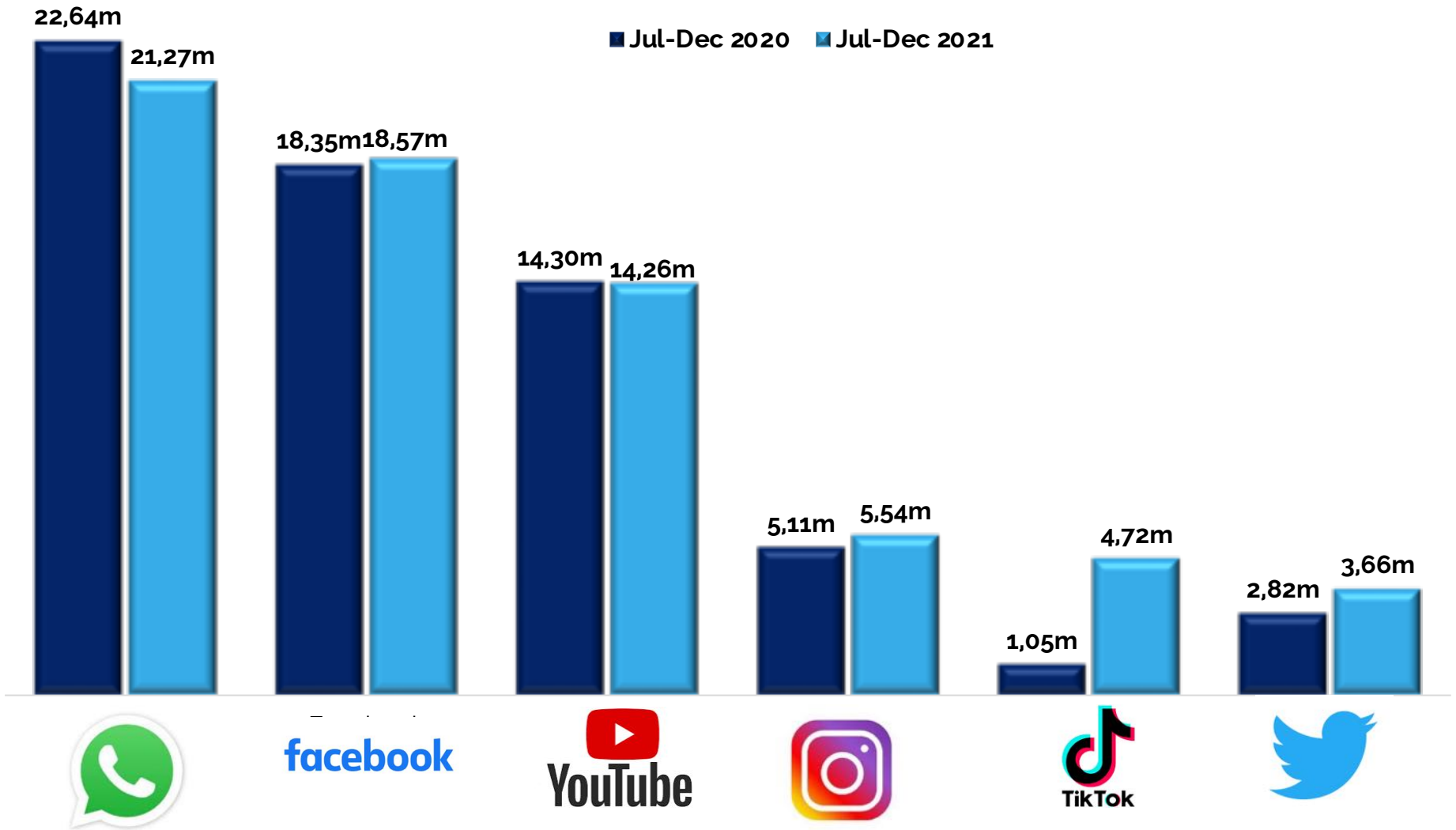
Social Media



Top Social Media Sites Visited Yesterday



Social Media shifts [Jul-Dec '20 vs. Jul-Dec '21]



Source: MAPS 2021/2022 (Apr '21 – Mar '22)

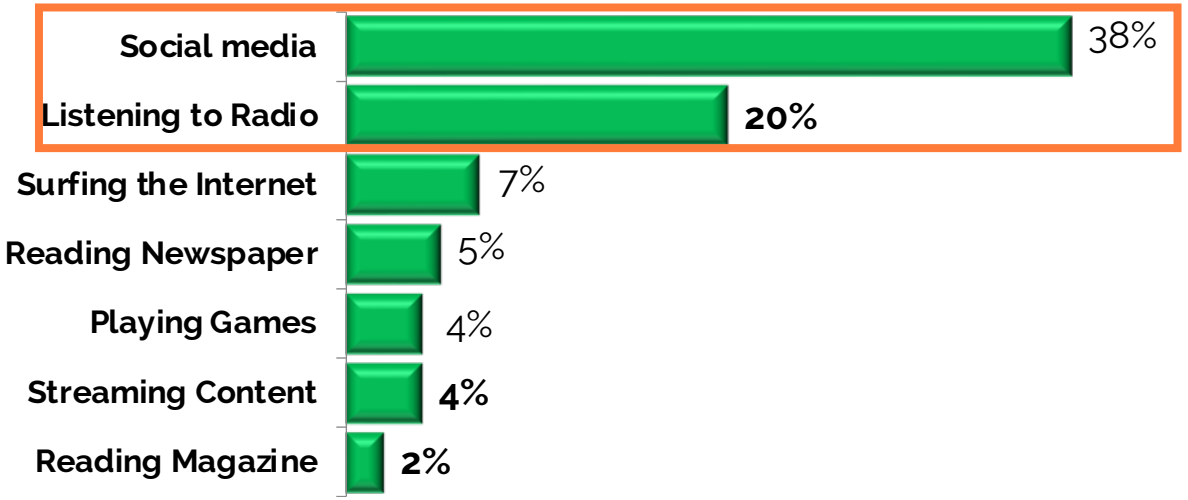
Population 15+: 43 085 487

Multiplatform Behaviour

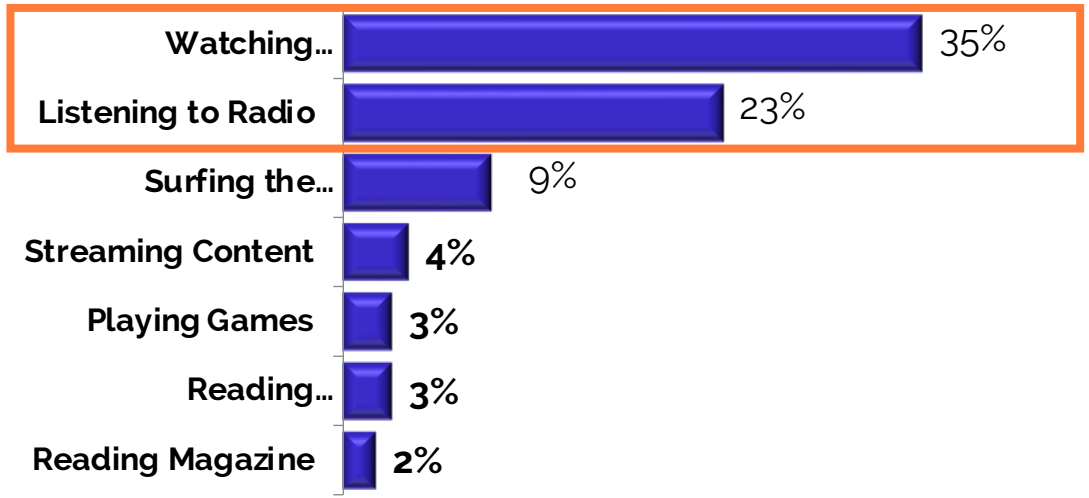
Multiplatform Behaviour

MARKETING RESEARCH FOUNDATION

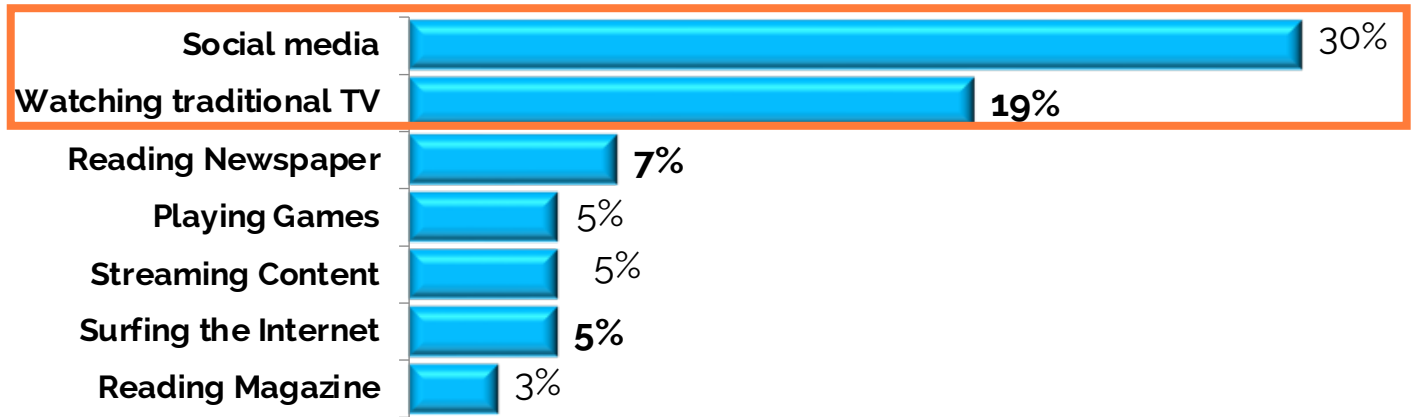
While watching live TV, which secondary activity do you engage in?



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



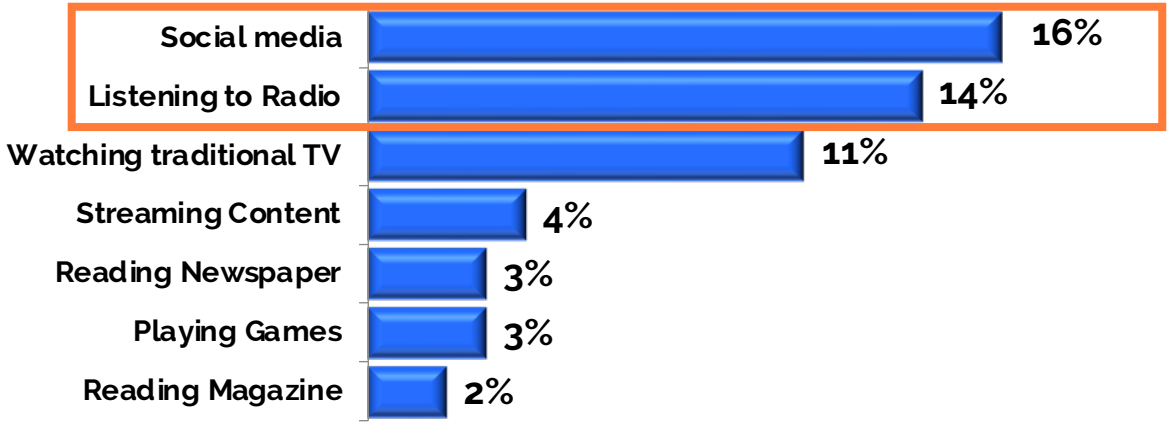
While listening to radio, which secondary activity do you engage in?



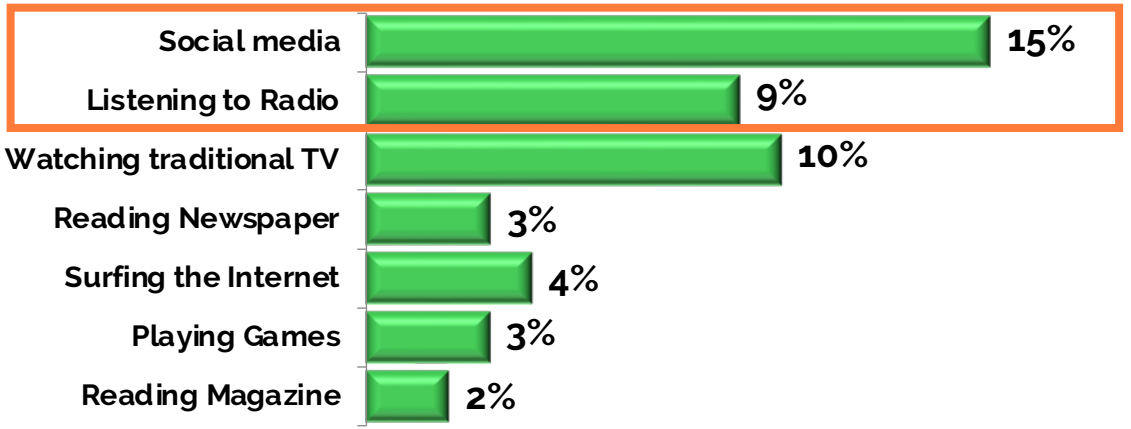
Multiplatform Behaviour Cont.

MARKETING RESEARCH FOUNDATION

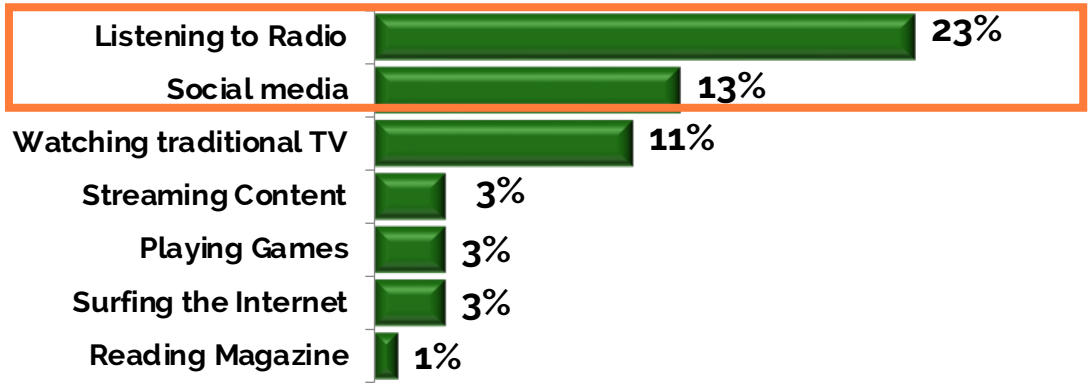
While surfing the internet, which secondary activity do you engage in?



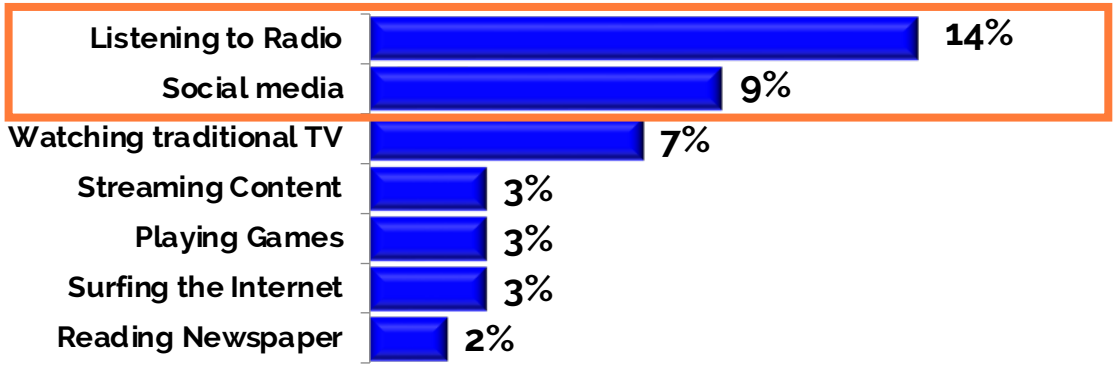
While streaming content, which secondary activity do you engage in?



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



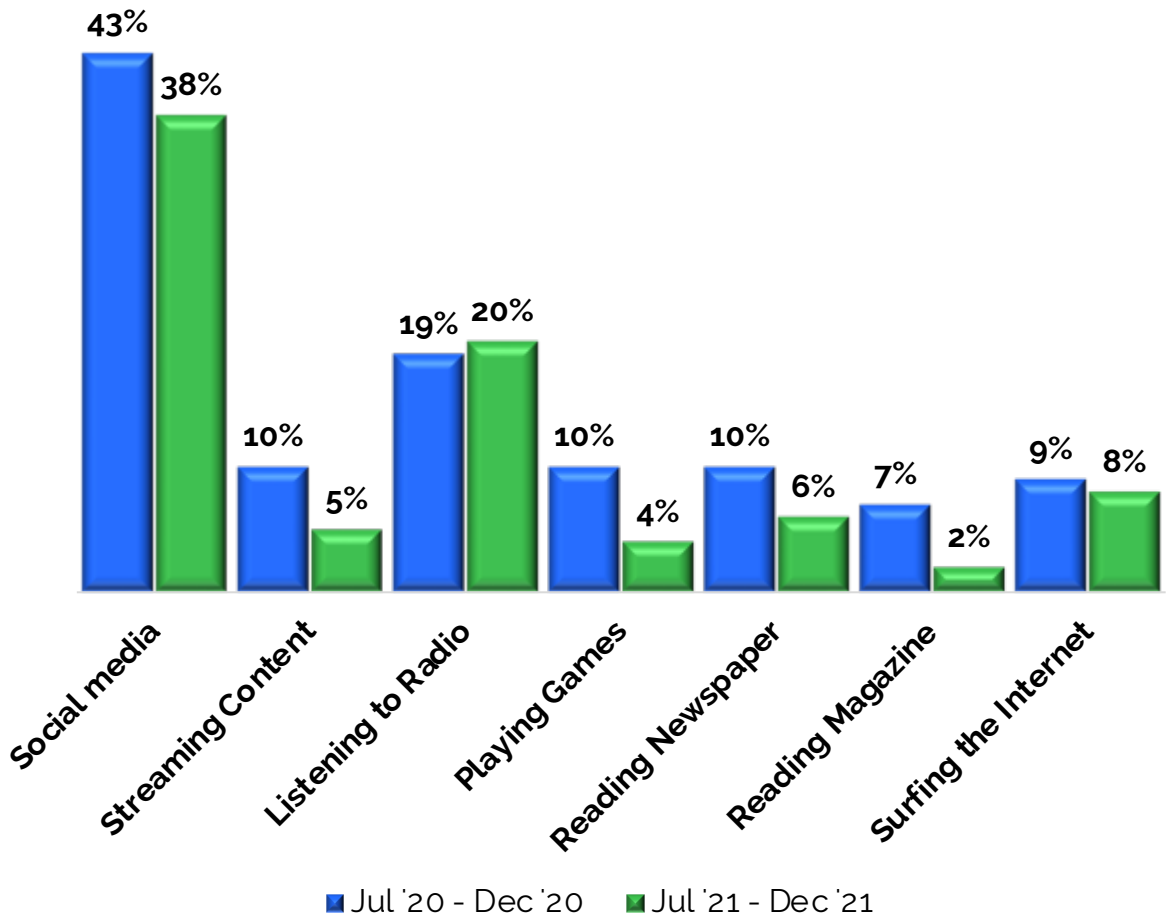
While reading a magazine, which secondary activity do you engage in?



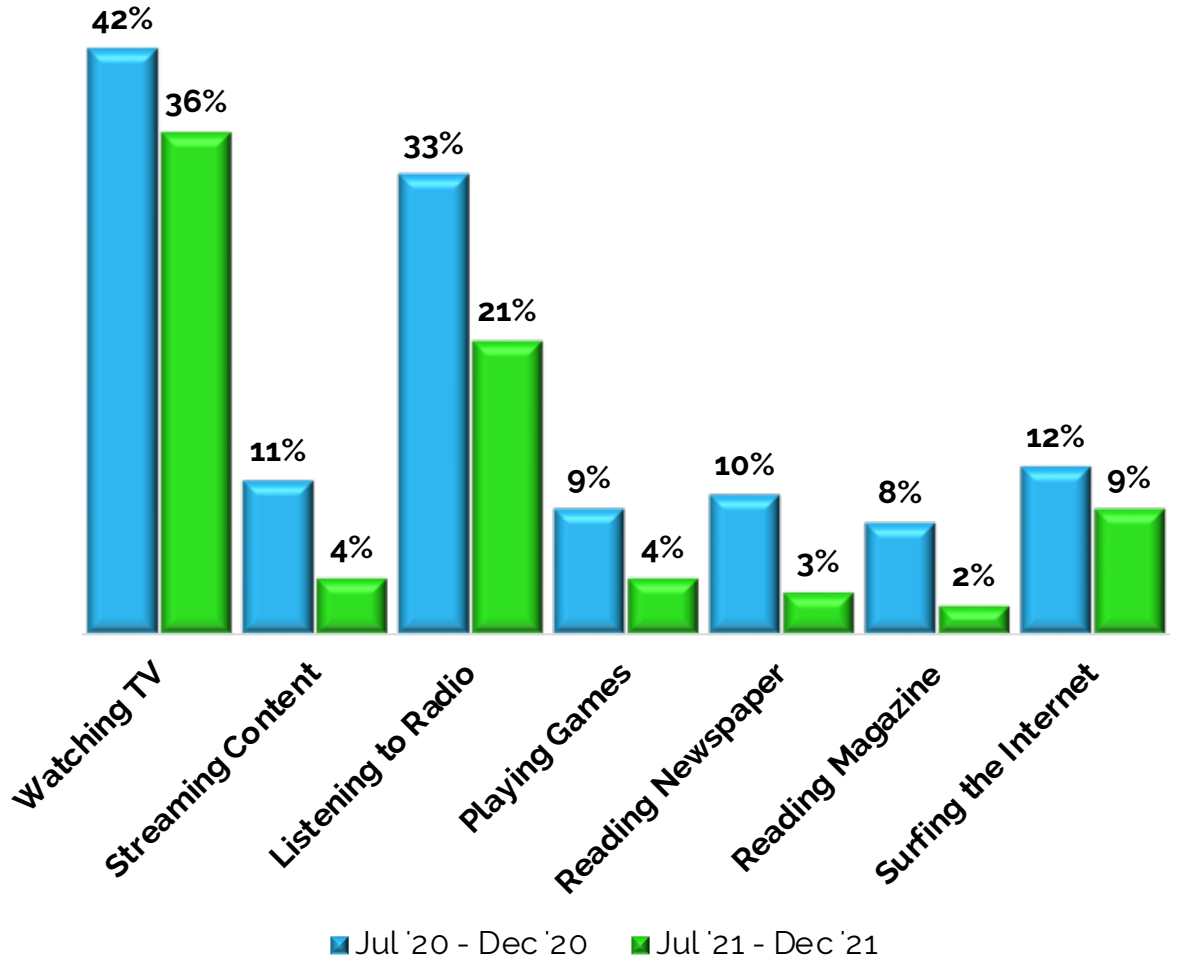
Multiplatform Behaviour - Shifts

MARKETING RESEARCH FOUNDATION

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

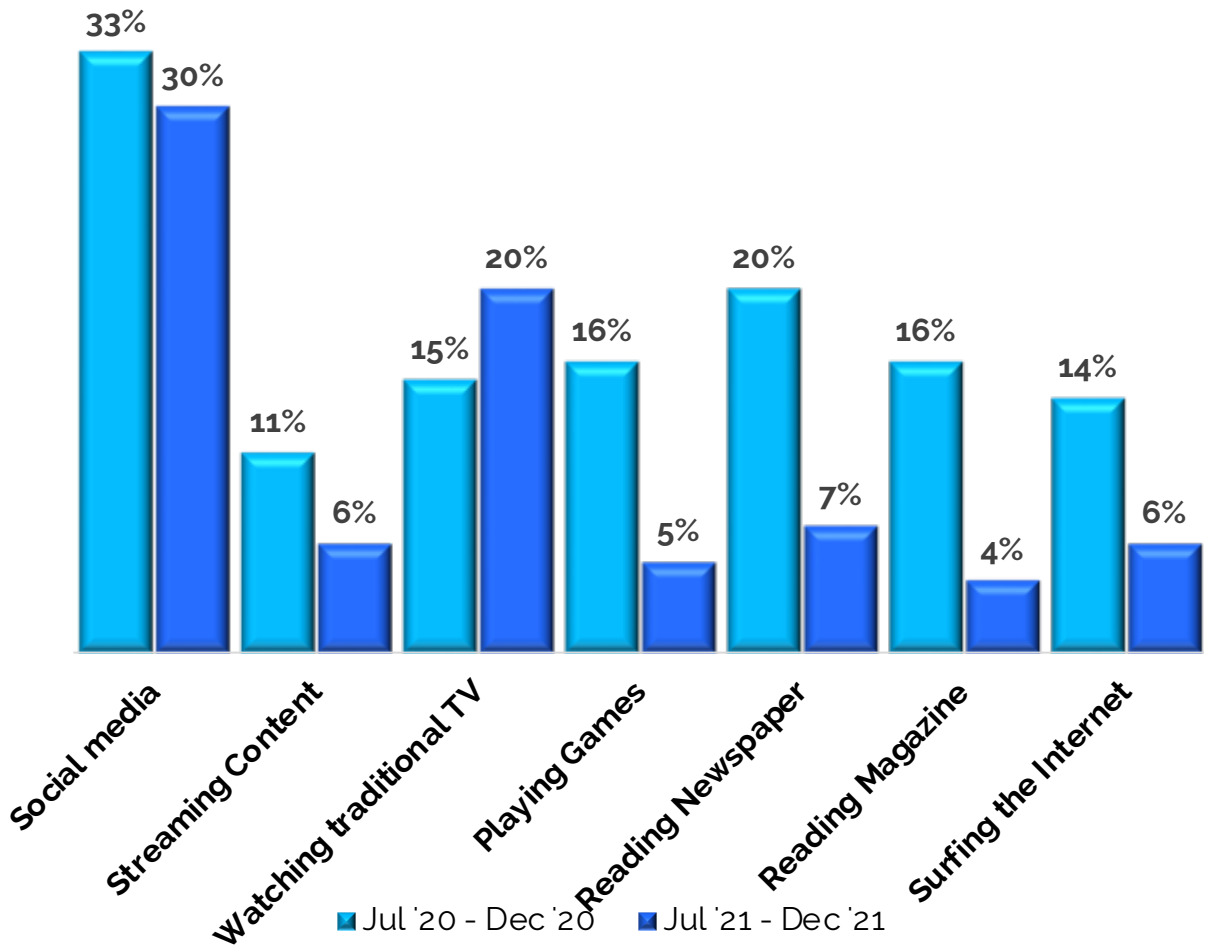


While on social media, which secondary activity do you engage in?

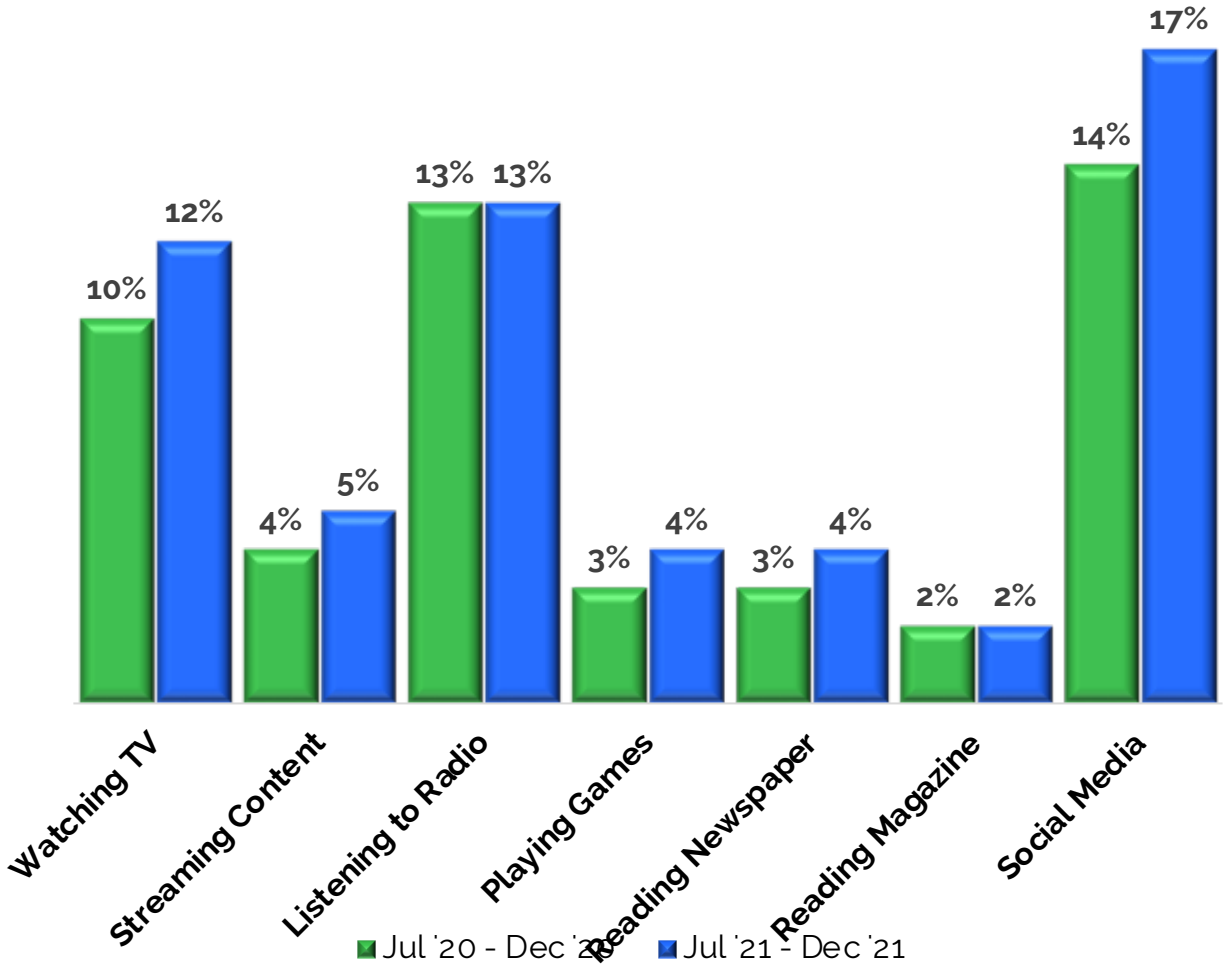


Multiplatform Behaviour – Shifts Cont.

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

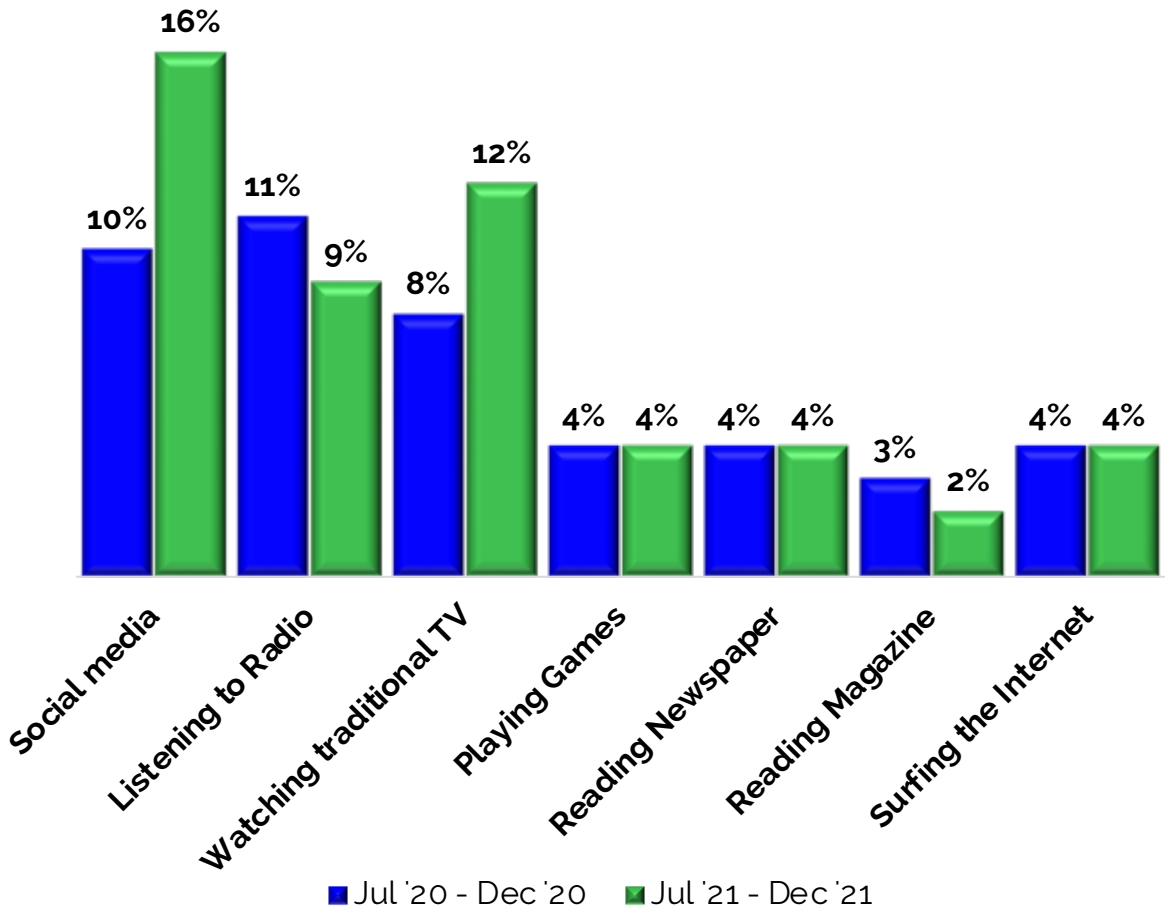


While surfing the internet, which secondary activity do you engage in?

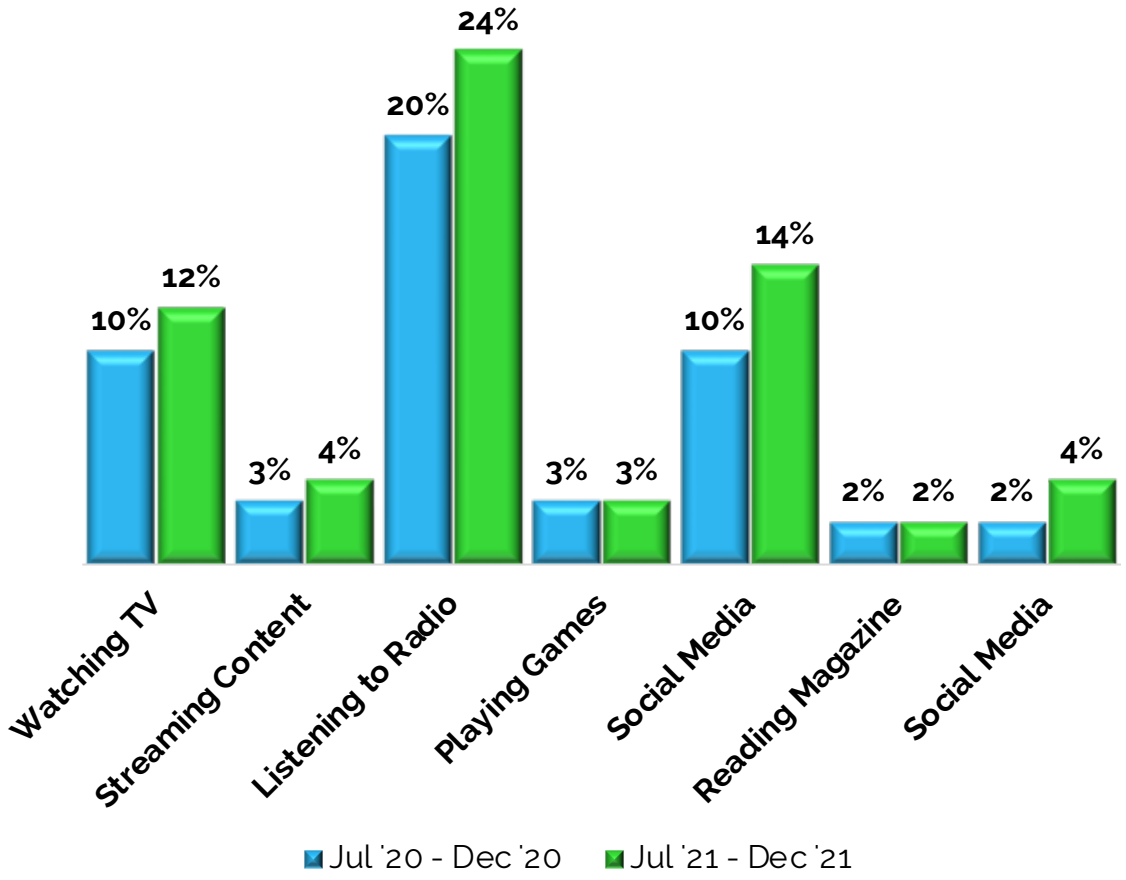


Multiplatform Behaviour – Shifts Cont.

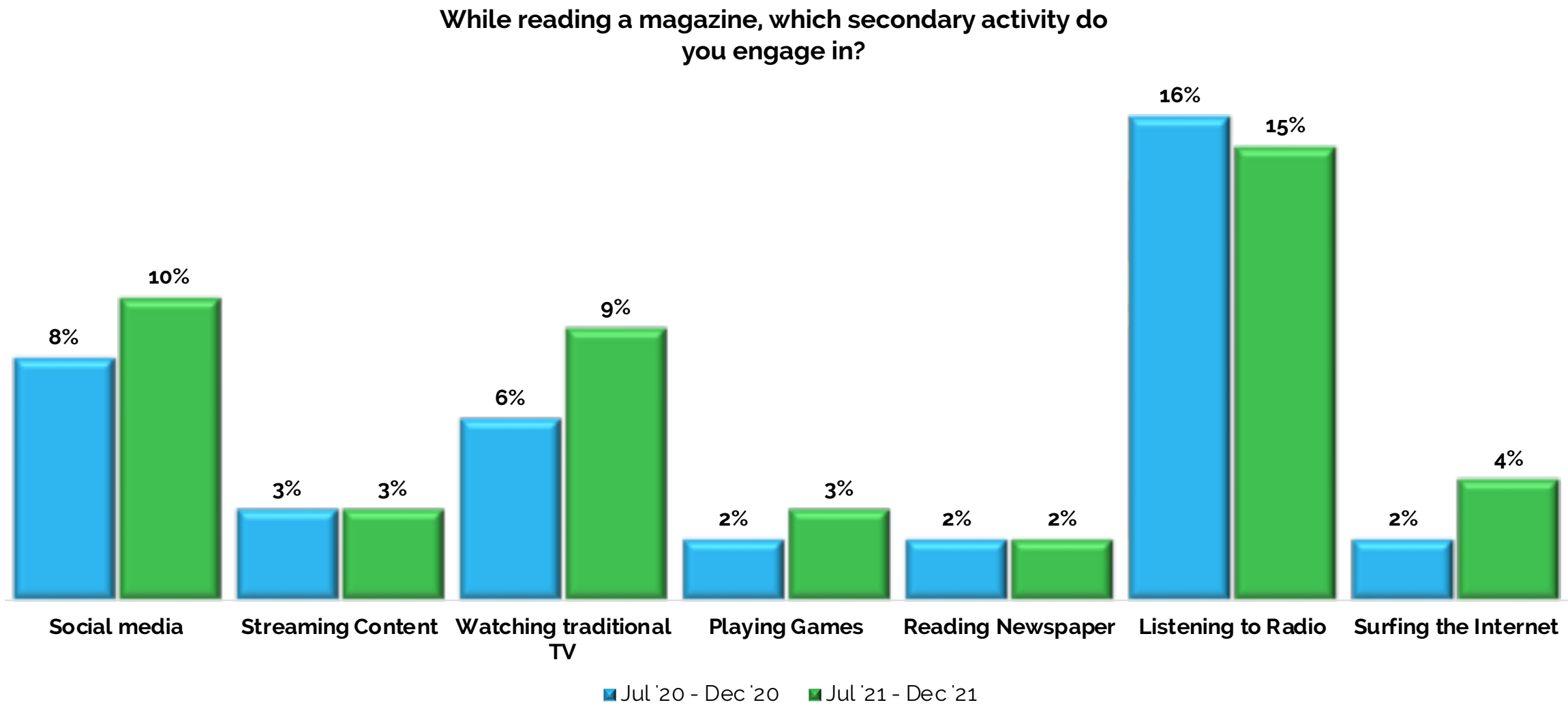
While streaming content, which secondary activity do you engage in?



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



Multiplatform Behaviour – Shifts Cont.



Cellphones

Cellphones

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.

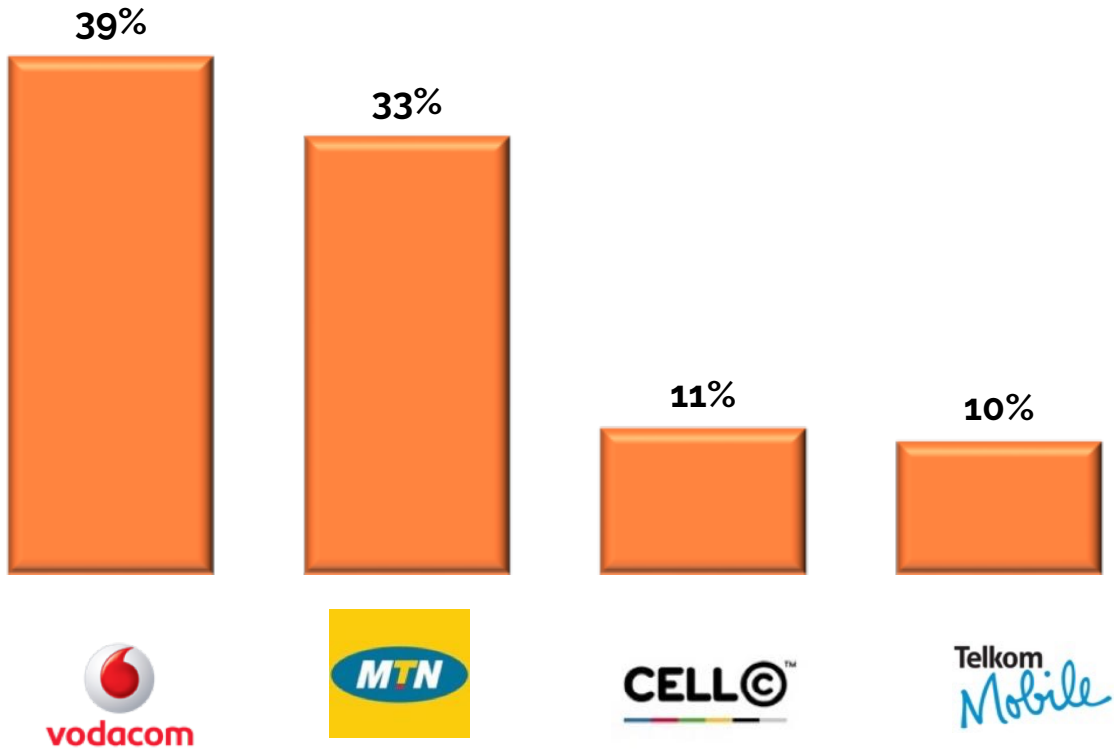
Household Entertainment

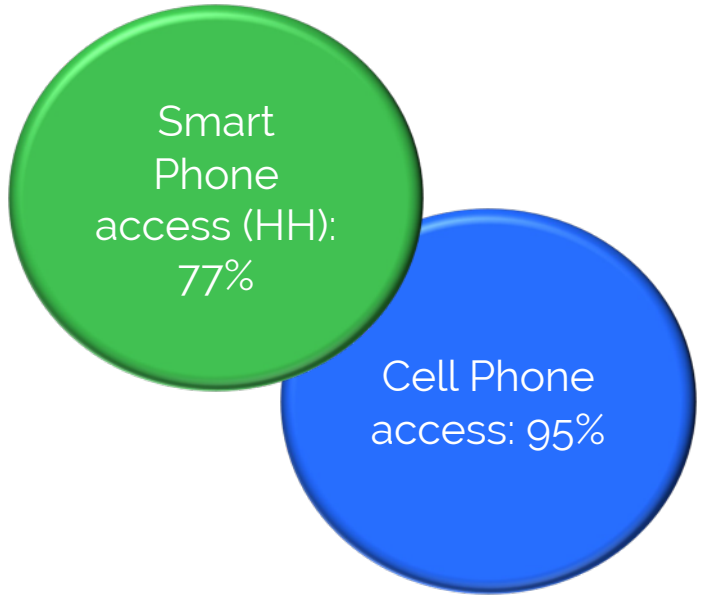
- Internet Access in the Home
- Interests, hobbies and activities
- Streaming

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:

3.4

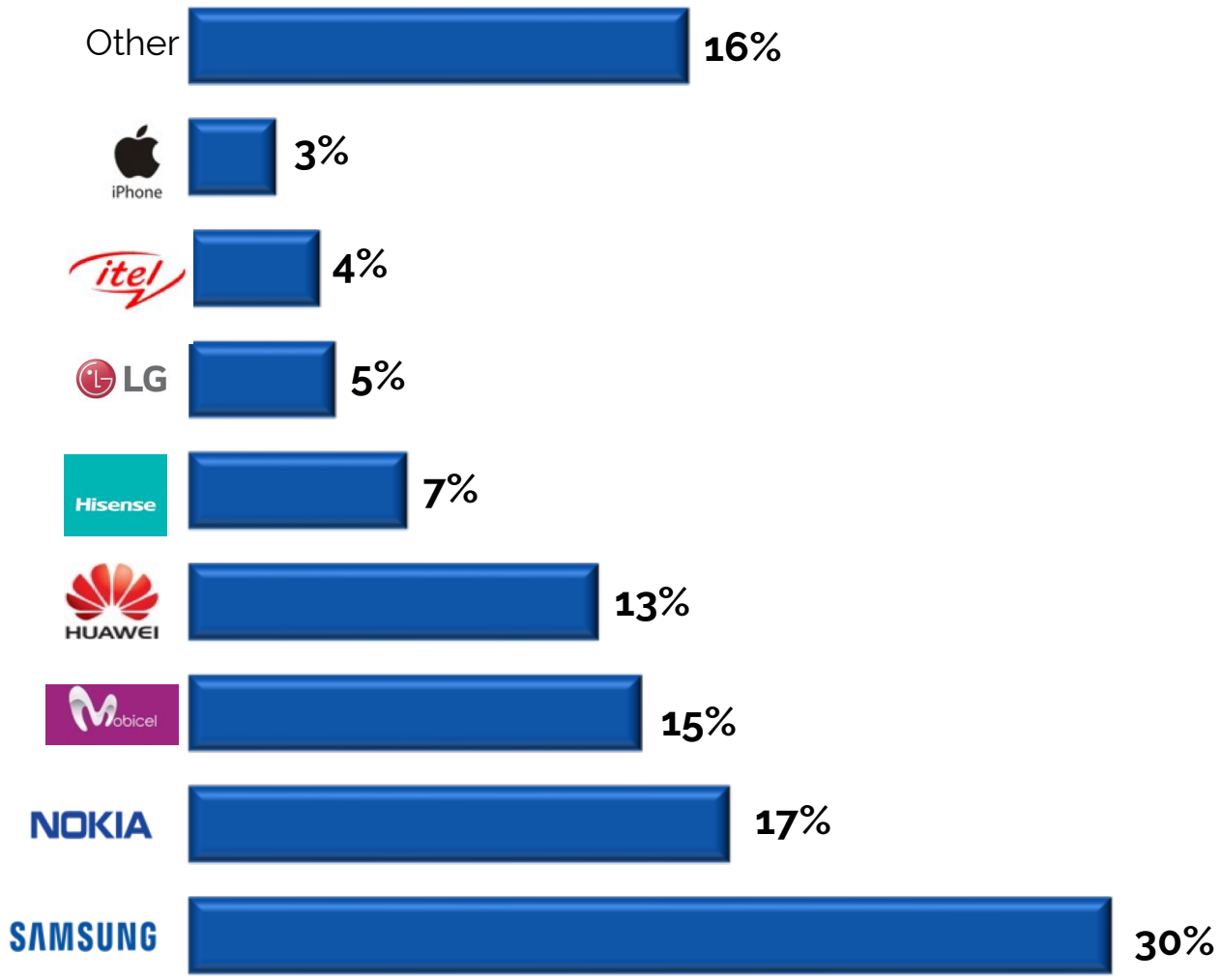
Average number of cell phones used by an individual:

1.1

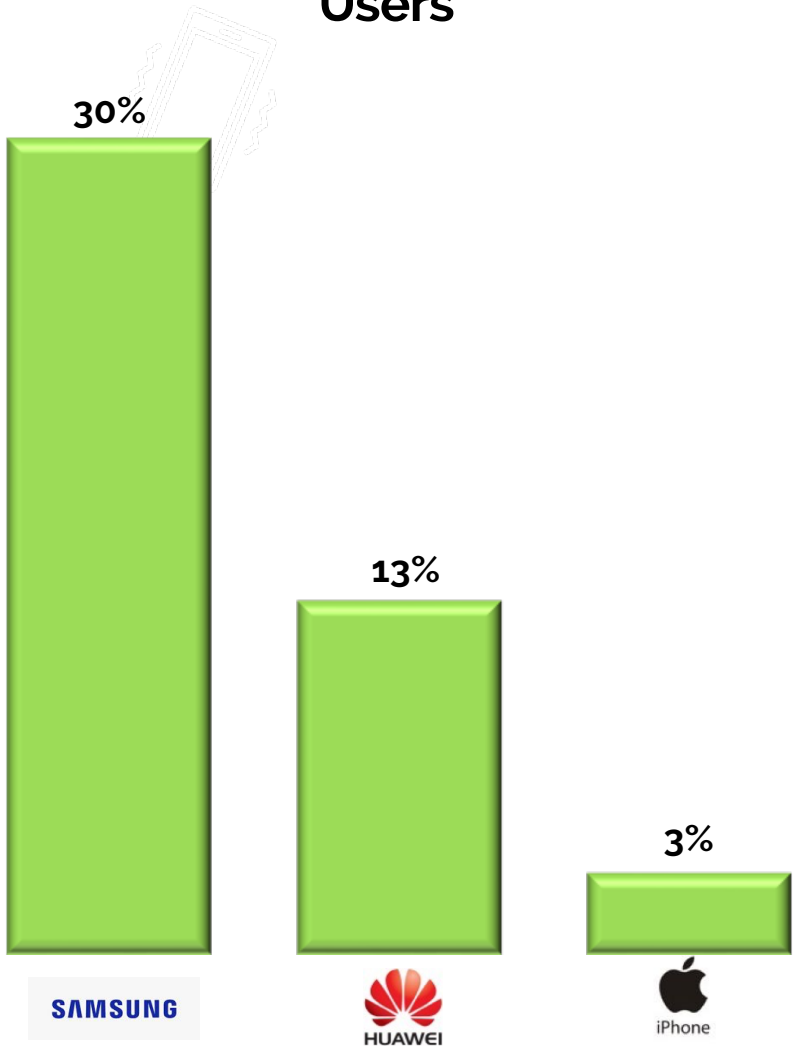
Source: MAPS 2021/2022 (Apr '21 – Mar '22)

Population 15+: 43 085 487

Top Cellphone Brands Used



Samsung vs. Huawei vs iPhone Users



Phone brand vs. Network Preference

Network Provider	Cellphone Brand: SAMSUNG	Mobicel	NOKIA	HUAWEI	iPhone
vodacom	37%	38%	52%	32%	32%
MTN	32%	42%	35%	31%	24%
CELL C	15%	12%	7%	16%	12%
Telkom Mobile	15%	8%	5%	20%	30%
Total Users	13.21mil	6.31mil	7.64mil	5.79mil	1.27mil

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

Number of Sim Cards vs. Network Preference

		Number of Sim Cards		
		One	Two	Three or more
Network Provider	vodacom	16.92mil	0.96mil	62.94k
	MTN	14.67mil	0.63mil	21.67k
	CELL C	5.24mil	0.21mil	4.64k
	Telkom Mobile	4.90mil	0.17mil	21.85k
	Total Users	41.73mil	1.97mil	0.11mil

Financial Services

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 purposee of the stokvel:
    - Savings
    - Groceries
    - Burial

SASSA Government Grants

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

Financial Services

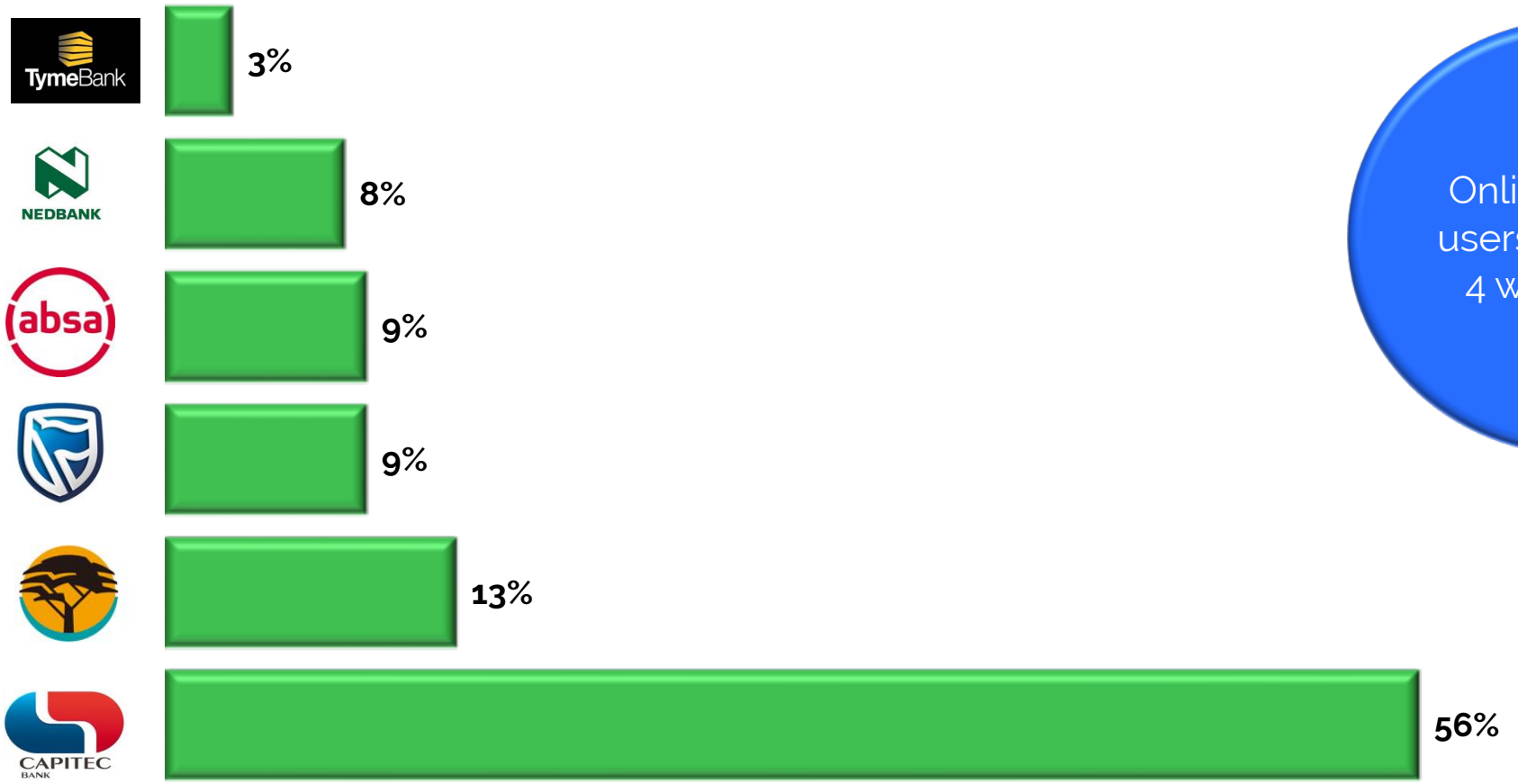
- Do respondents make use of services such as eWallet, CashSend, mpesa etc.
- Do respondents make use of loyalty programmes
- Store accounts
- Medical aid schemes
- Insurance
    - Who is the preferred provider for:
        - Long-term policies
        - Short-term policies

Saving/investment 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

Banking - Institutions

Primary bank into which most income is paid



Online Banking users in the past 4 weeks: 20%

Source: MAPS 2021/2022 (Apr '21 – Mar '22)

Population 15+: 43 085 487

Banks Used – Shifts [Jul-Dec '20 vs. Jul-Dec '21]

MARKETING RESEARCH FOUNDATION

2020|2021

2020: 9% [3 983 821] of respondents used **ABSA**

2021: 7% [2 895 213] of respondents used **ABSA**

2020|2021

2020: 35% [14 948 497] of respondents used **Capitec**

2021: 40% [17 269 053] of respondents used **Capitec**

2020|2021

2020: 13% [5 393 223] of respondents used **FNB**

2021: 10% [4 173 447] of respondents used **FNB**

2020|2021

2020: 8% [3 372 348] of respondents used **Nedbank**

2021: 6% [2 731 134] of respondents used **Nedbank**

2020|2021

2020: 8% [3 330 165] of respondents used **Standard Bank**

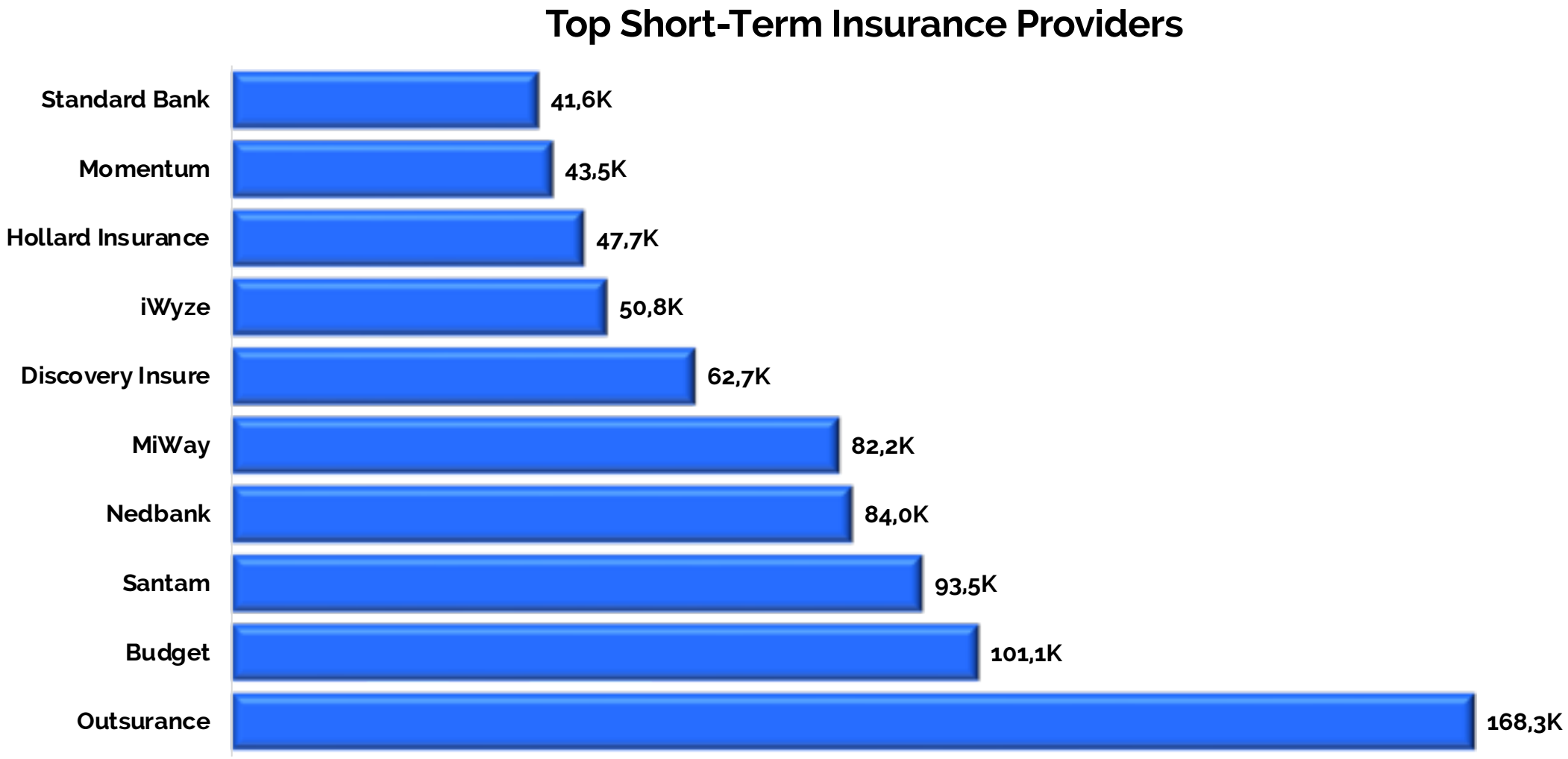
2021: 6% [2 732 372] of respondents used **Standard Bank**

2020|2021

2020: 1% [447 881] of respondents used **TymeBank**

2021: 3% [1 098 470] of respondents used **TymeBank**

Short term Insurance

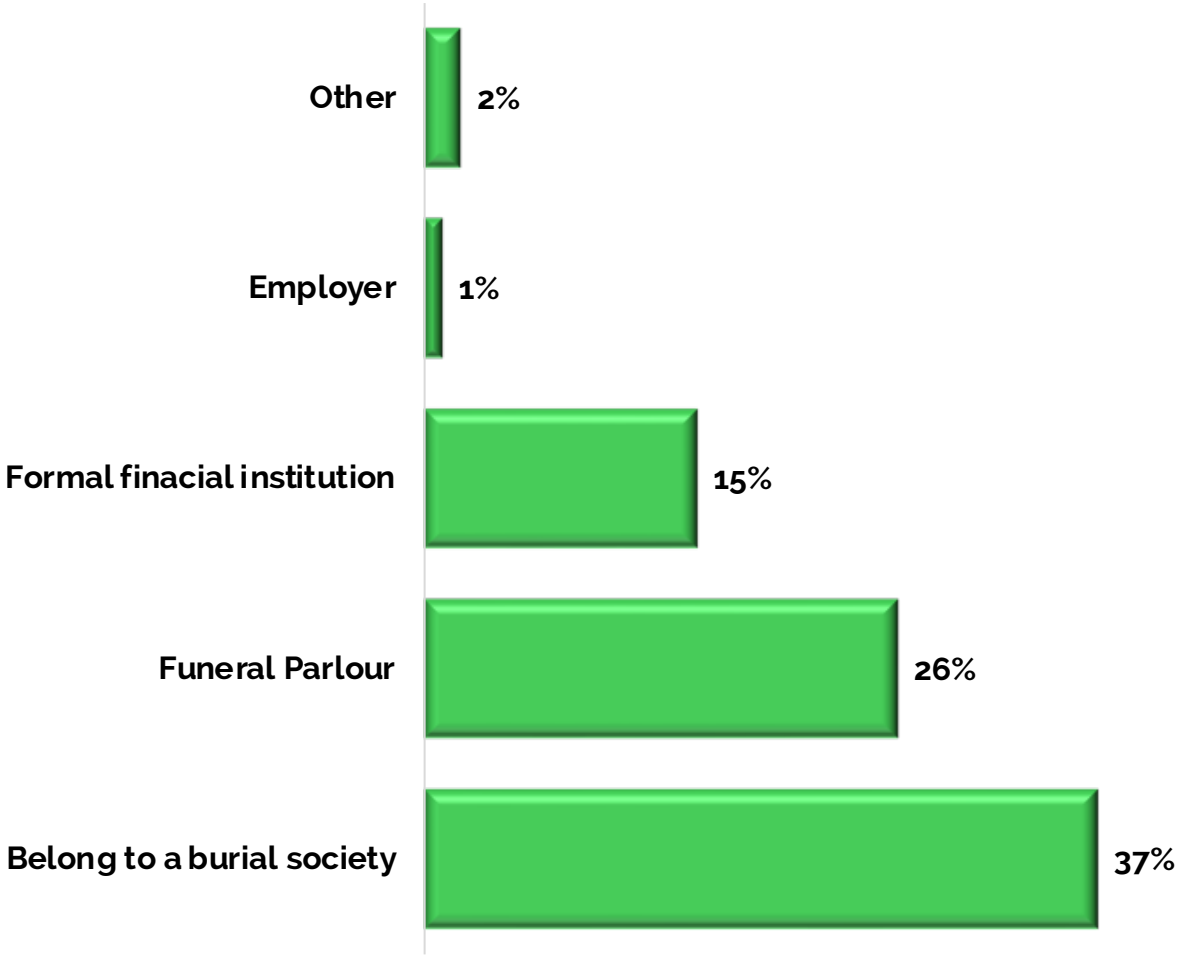


Source: MAPS 2021/2022 (Apr '21 – Mar '22)

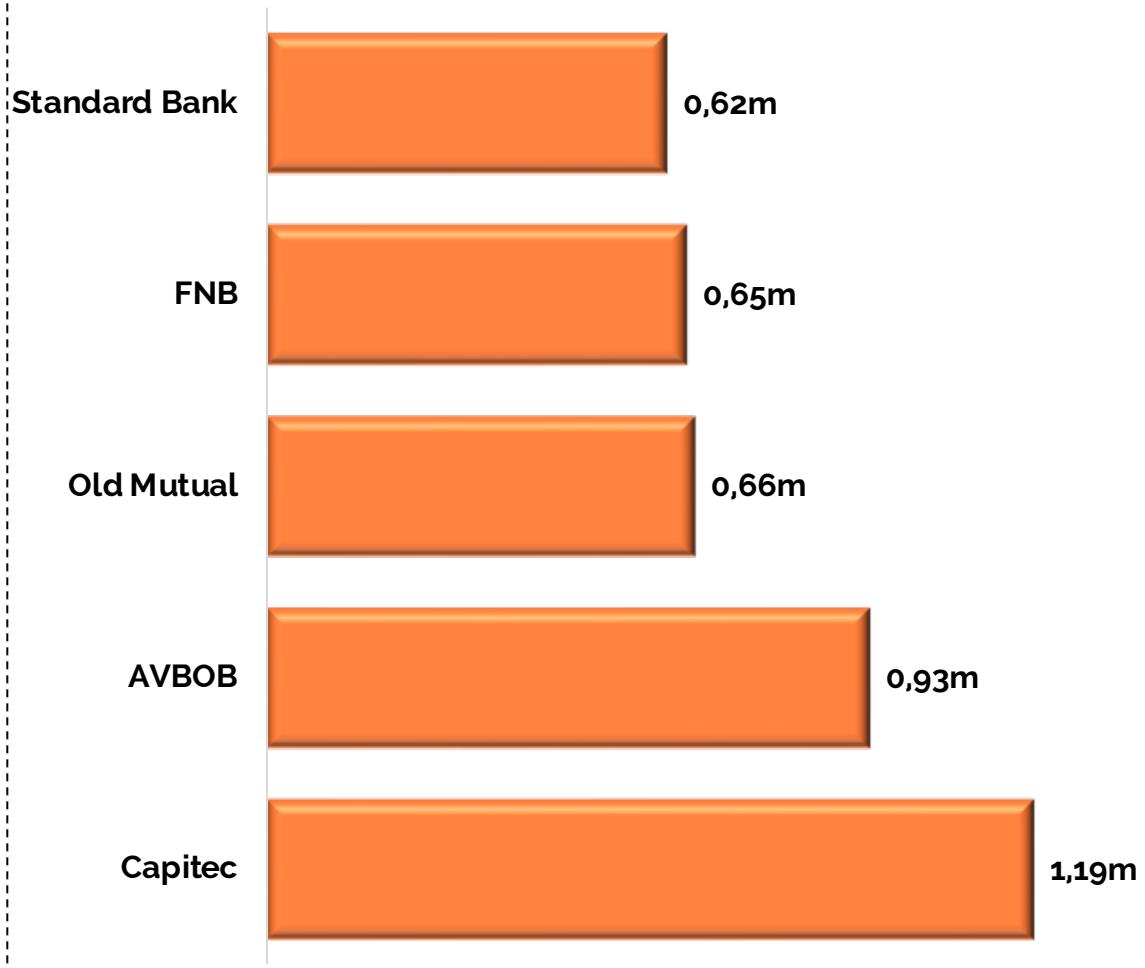
Population 15+: 43 085 487

Funeral insurance

Have Funeral Cover



Funeral Insurance - Top Companies

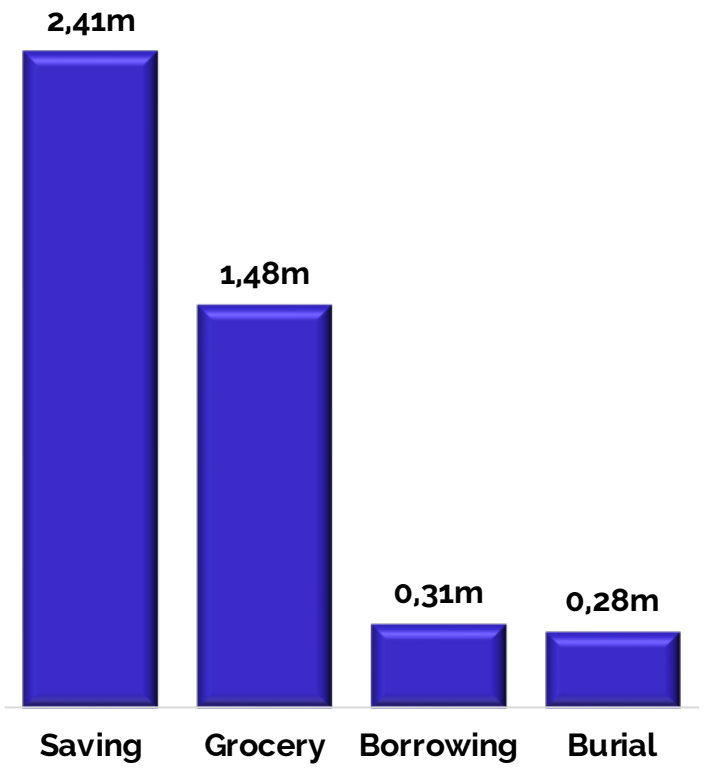


Source: MAPS 2021/2022 (Apr '21 – Mar '22)

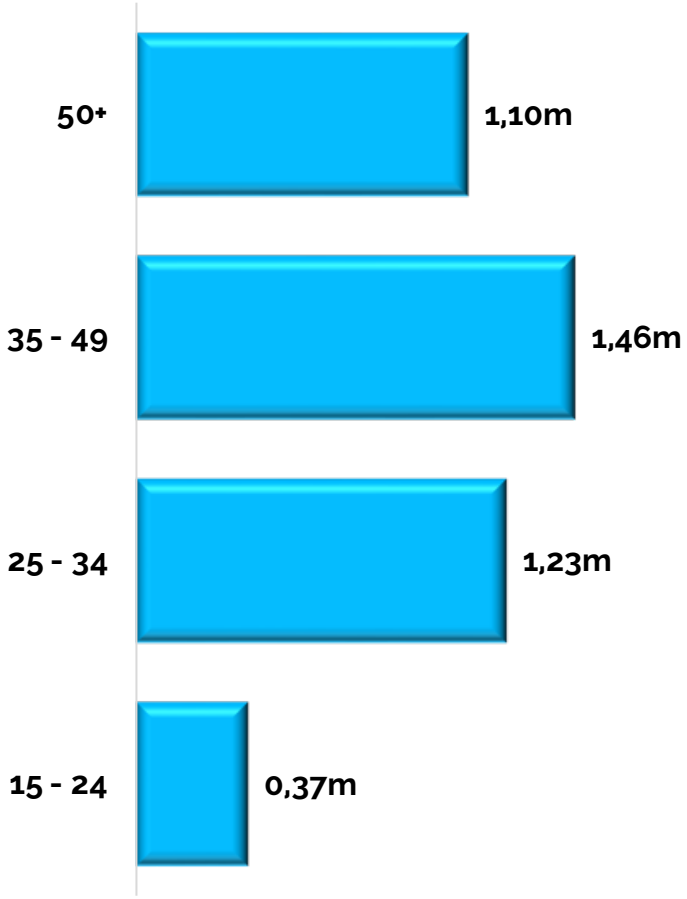
Population 15+: 43 085 487

Stokvel Participation

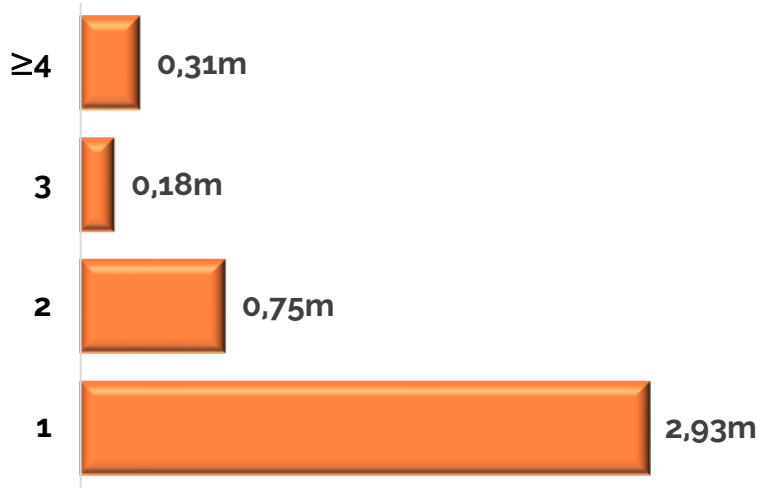
Type of Stokvel



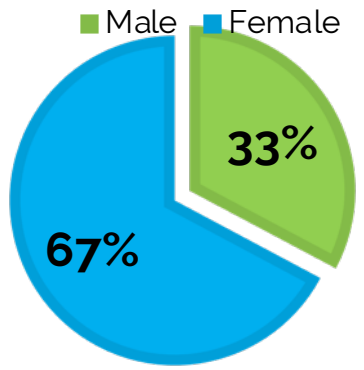
Age Profile of Stokvel Members



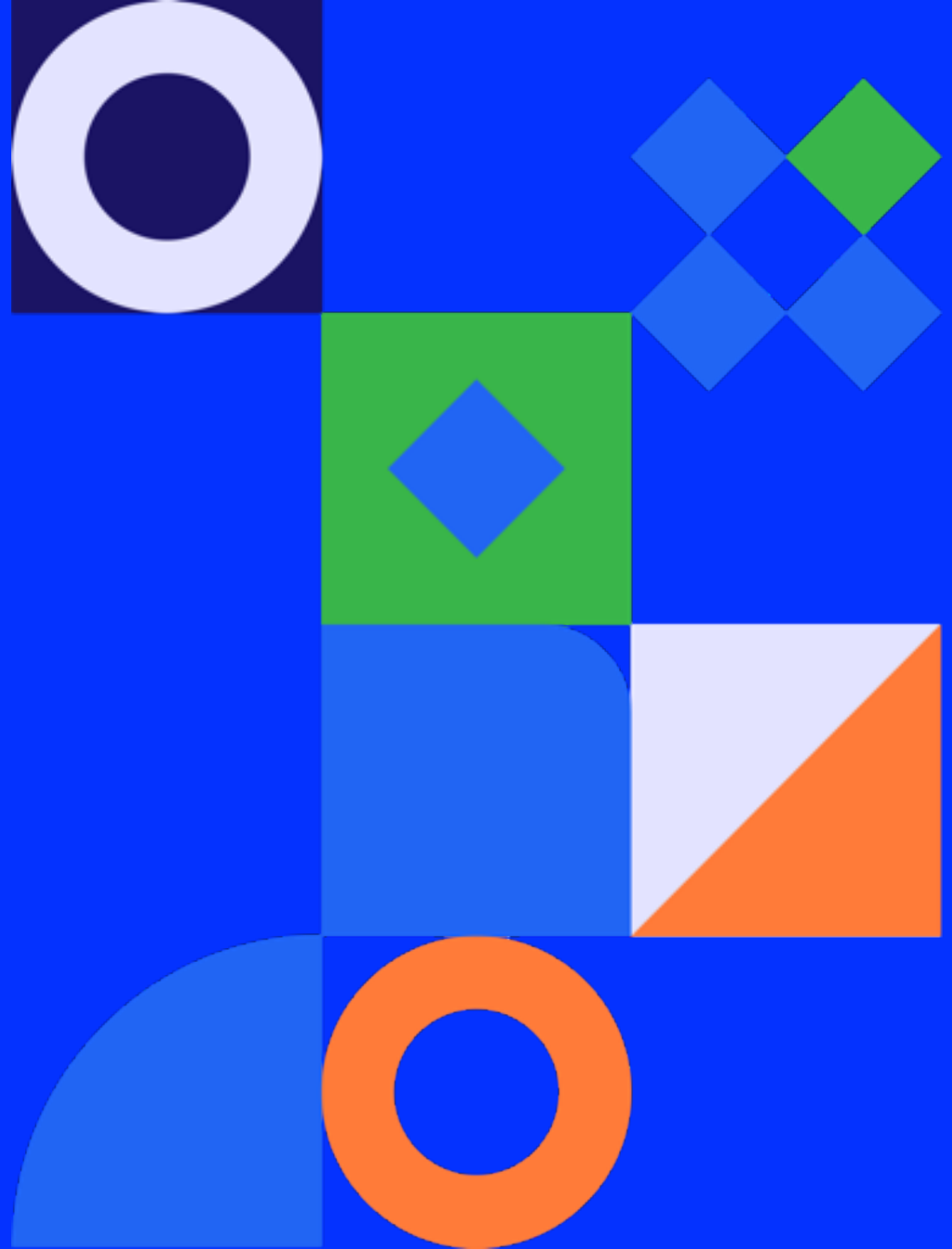
Number of Stokvels



n=4 167 548



Automotive



Automotive

Automotive Purchasing Behaviour

- How many vehicles are there in the household
- Are these vehicles currenty 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.

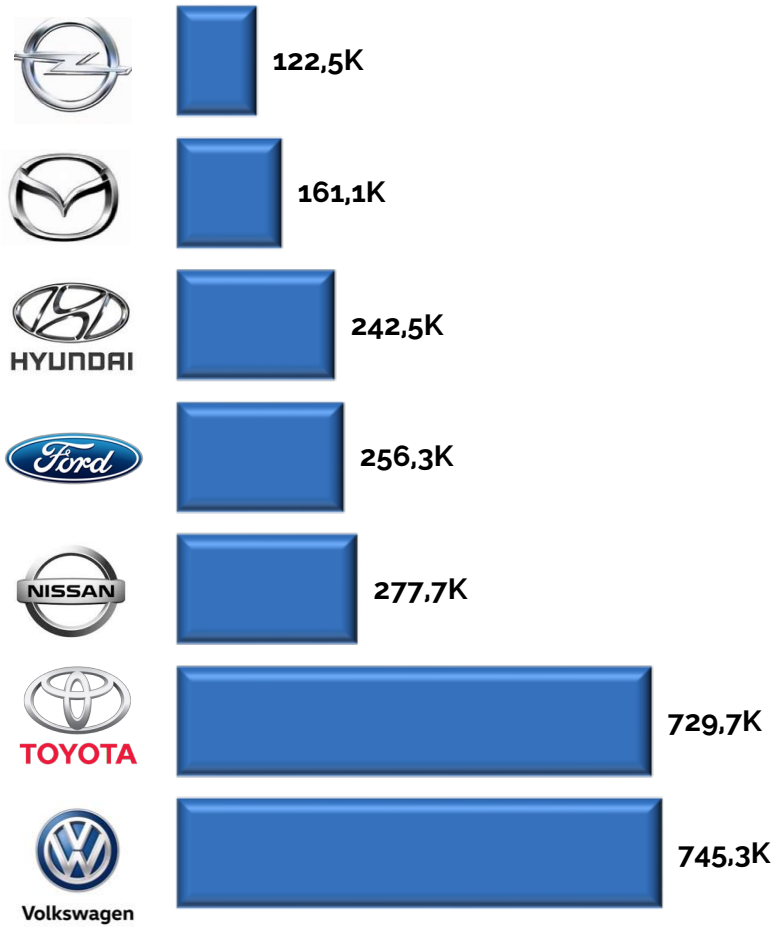
Automotive Driving Behaviour

- 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

Personal Vehicles

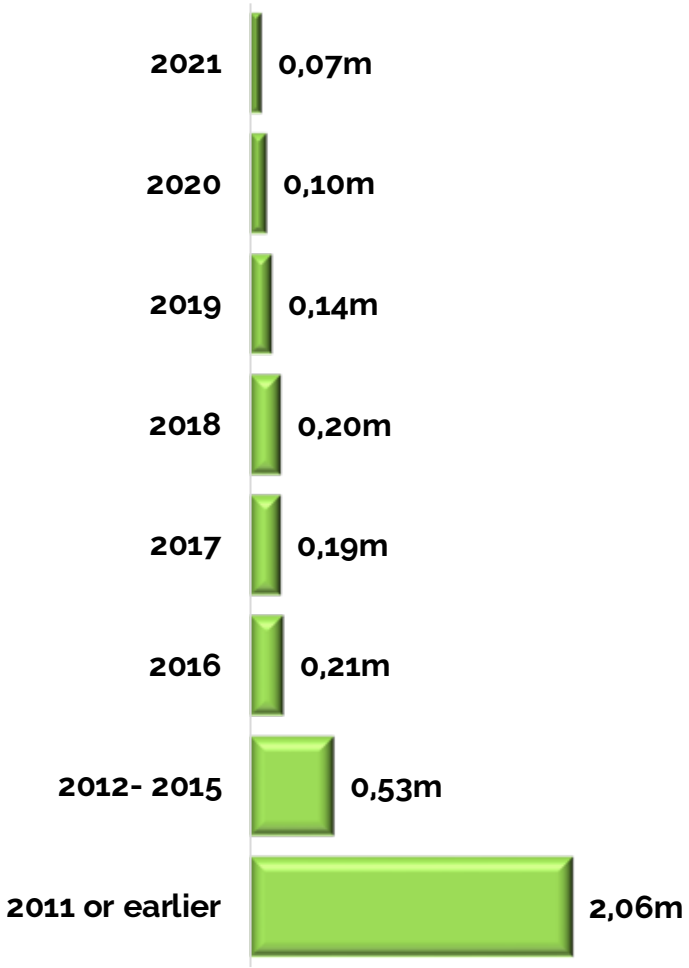
n=3 504 050

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



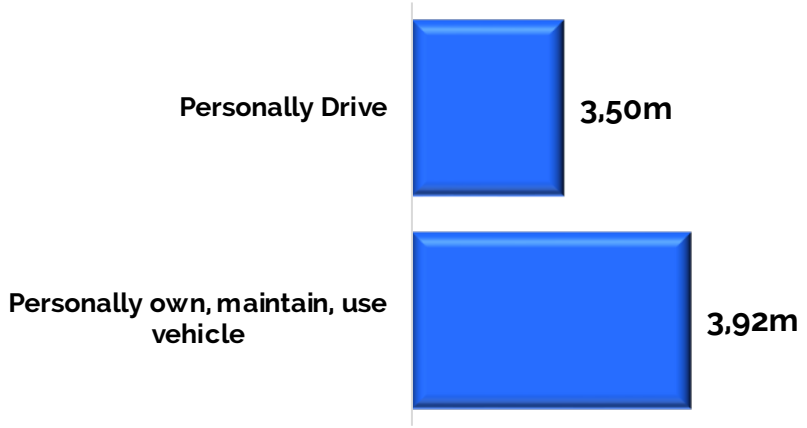
n=3 504 050

Year of Manufacture



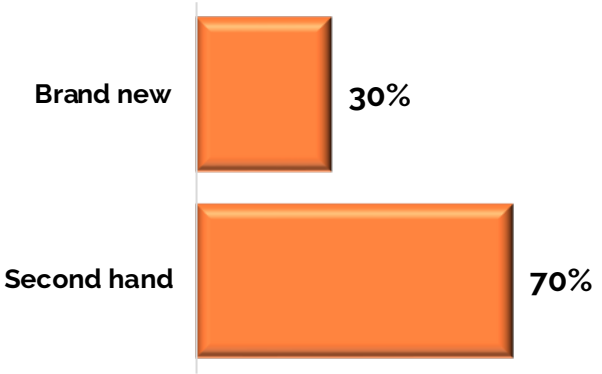
Vehicle Ownership

n=3 924 438



Status of vehicle when purchased

n=3 504 050



Source: MAPS 2021/2022 (Apr '21 – Mar '22)

Automotive Trends

MARKETING RESEARCH FOUNDATION

2020|2021

2020: 14% [6 074 806] of respondents **personally owned a vehicle**

2021: 10% [4 085 587] of respondents **personally owned a vehicle**

2020|2021

2020: 13% [5 516 020] of respondents **personally drove a vehicle**

2021: 8% [3 618 909] of respondents **personally drove a vehicle**

2020|2021

2020: 4% [1 589 122] of respondents obtained their vehicle **new**

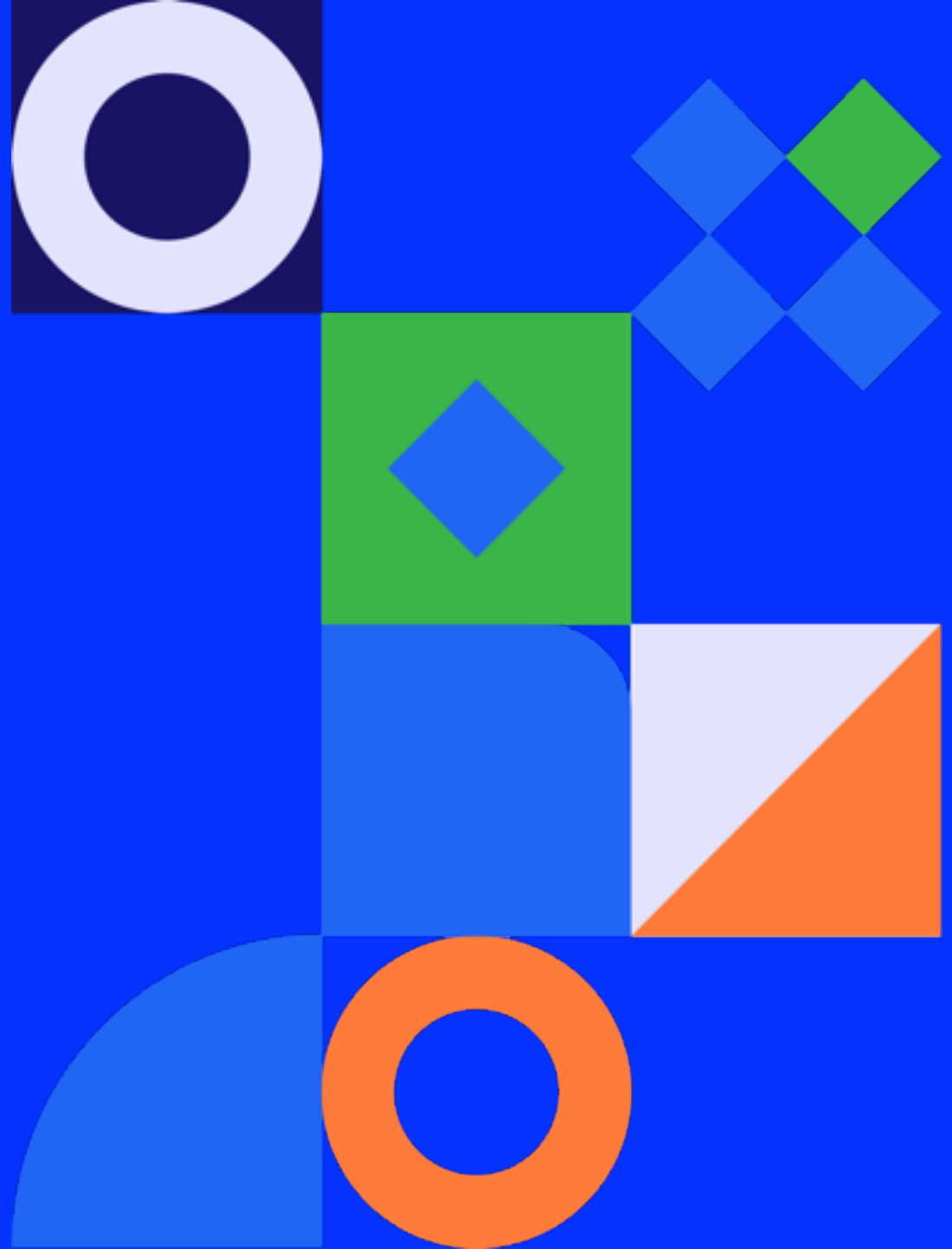
2021: 3% [1 080 775] of respondents obtained their vehicle **new**

2020|2021

2020: 9% [3 926 898] of respondents obtained their vehicle **second hand**

2021: 6% [2 538 134] of respondents obtained their vehicle **second hand**

Retail



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
- Preferred mall or shopping centre
- Preference for ecommerce outlets
- Who is the preferred retailer for:
  - Groceries
  - Cosmetics and toiletries
  - Liquor
  - Appliances and large items

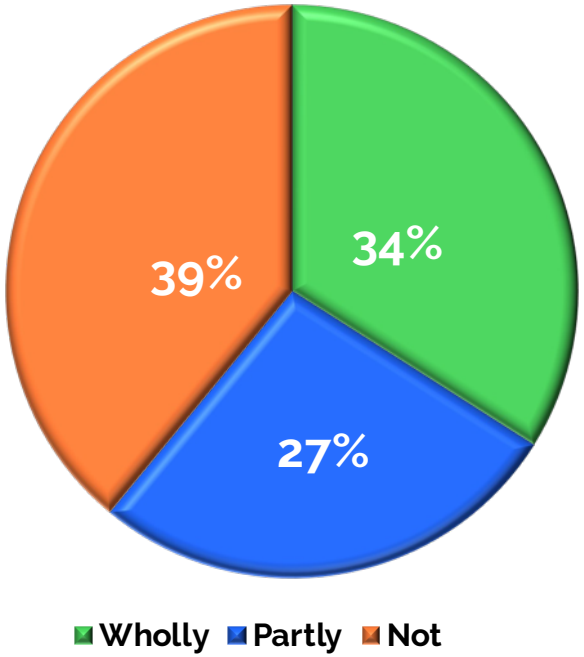
Fast Food Purchasing Behaviour

- How often do they consume fast food
- Purchasing behaviour associated with fast food
  i.e. delivery, dine-in, order at the counter etc.
- Preferred outlet for fast food consumption

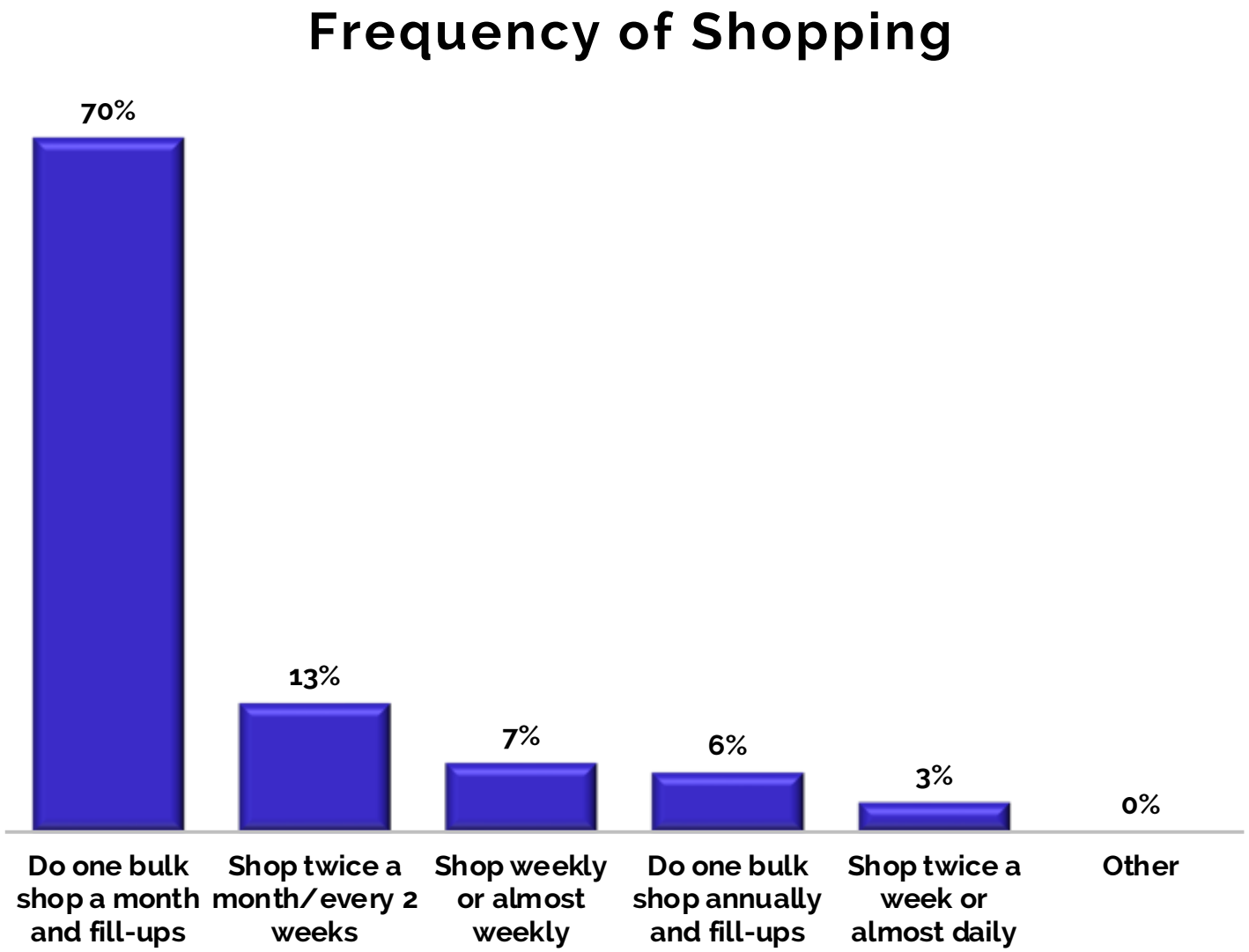
Products and Brands

- Household groceries
- Snacks, biscuits and chips
- Household cleaning products
- Alcohol and non-alcoholic beverages
- Pet food
- Personal care items
- Cosmetics
- Clothing and shoes
  - Shopping for themselves, their partner or their children
- Brand loyalty

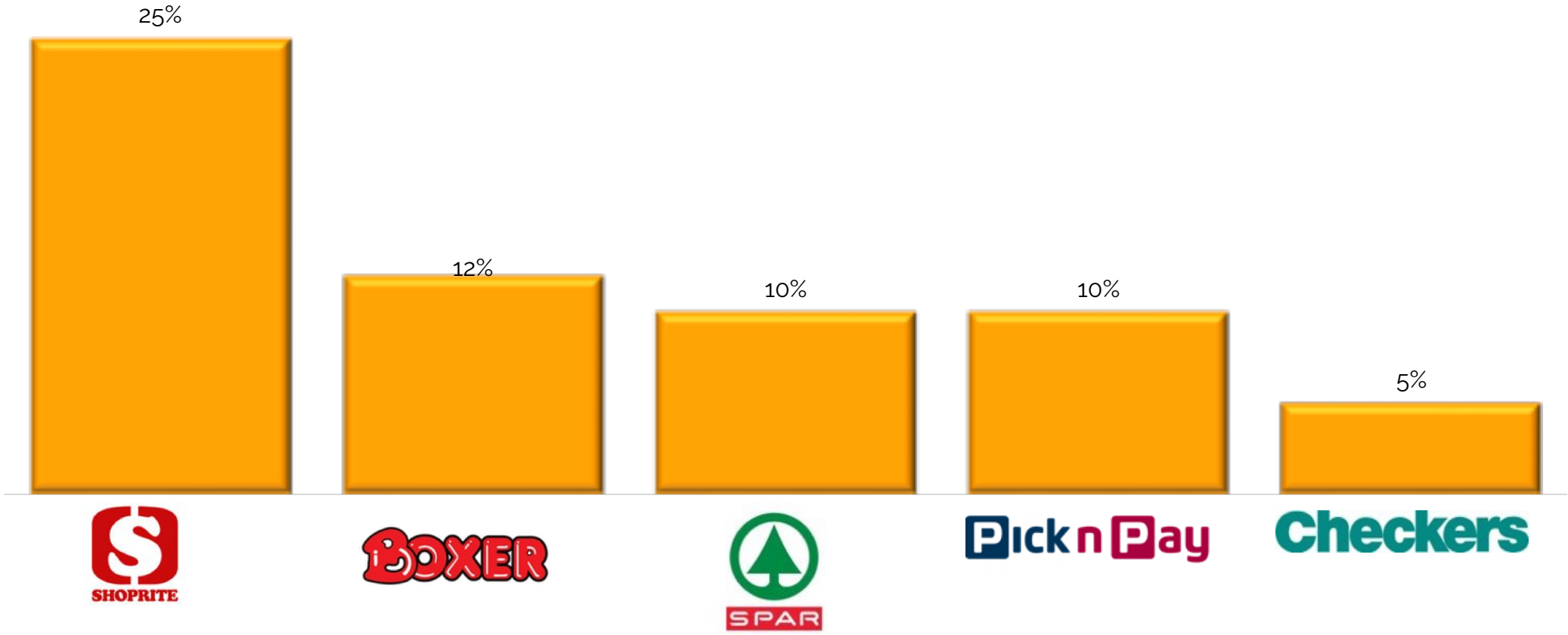
Household Purchase Behaviour



Purchase Responsibility



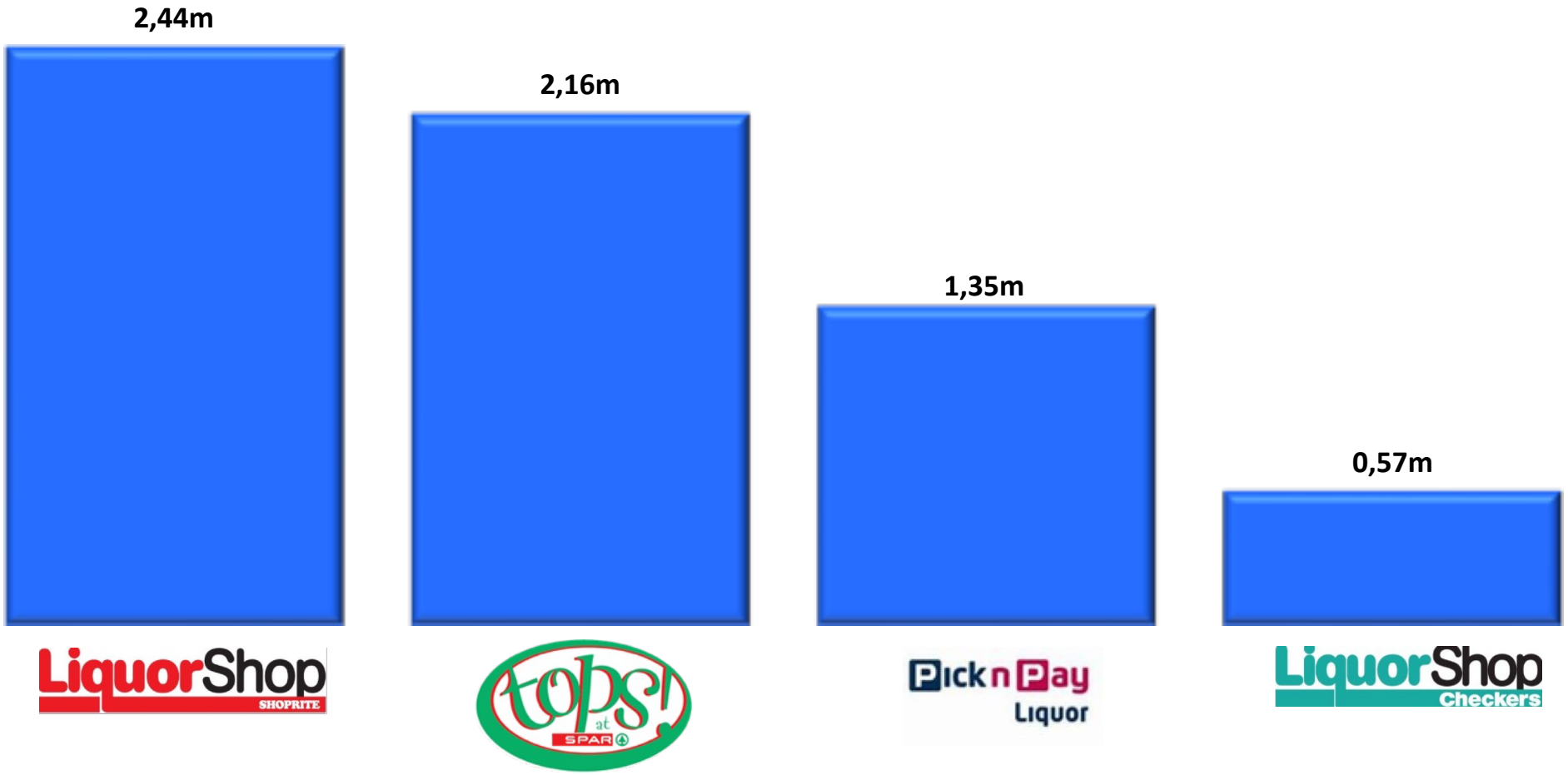
Top Bulk Grocery Retailers



Source: MAPS 2021/2022 (Apr '21 – Mar '22)

Population 15+: 43 085 487

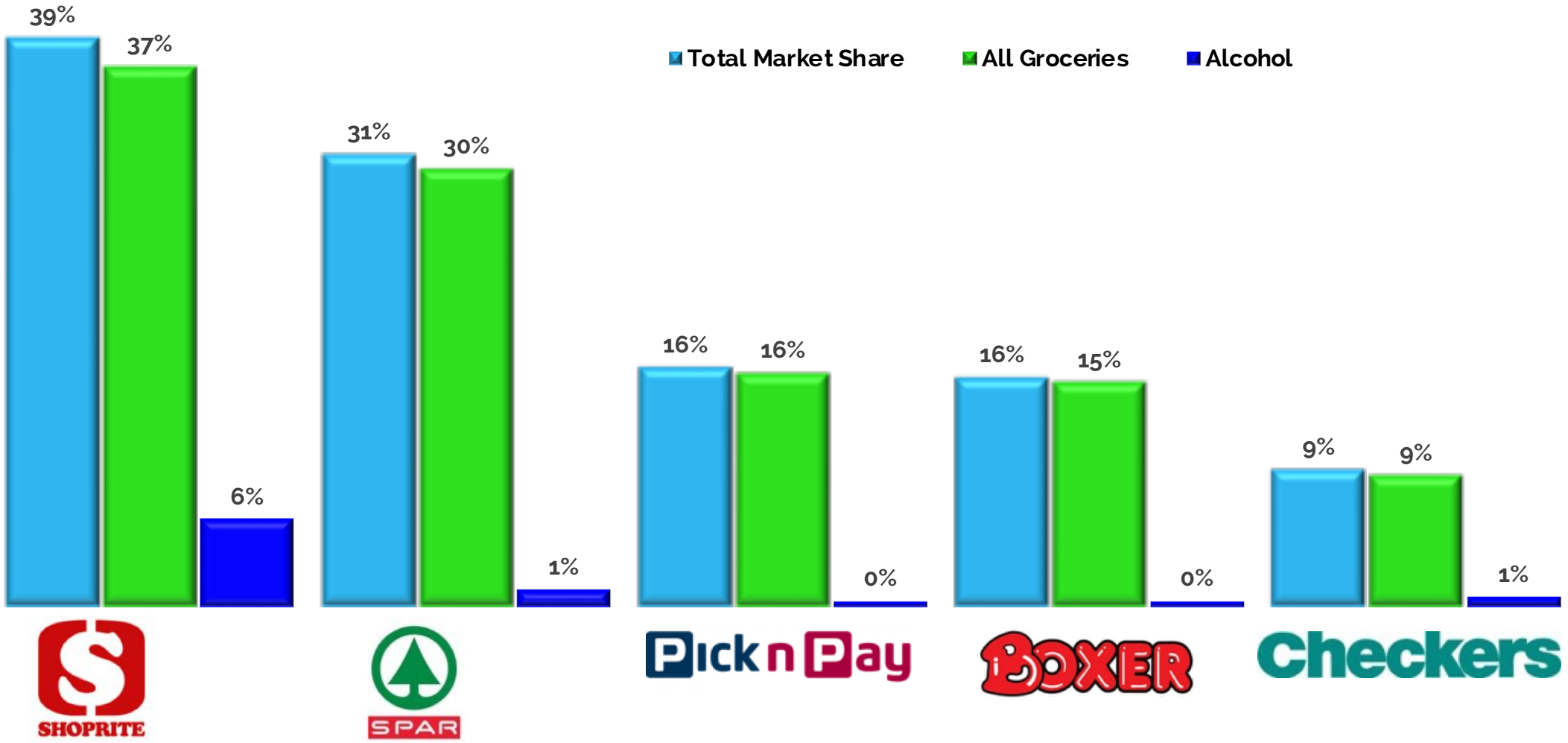
Top Liquor Stores P4W



Source: MAPS 2021/2022 (Apr '21 – Mar '22)

Population 15+: 43 085 487

Top Retailers (All Groceries and Alcohol P4W)



Retail Trends

MARKETING RESEARCH FOUNDATION

Monthly spend on groceries Jul – Dec 2020|2021

2020: R1 940
2021: R1 897

Do one bulk shop annually and fill-ups Jul – Dec 2020|2021

2020: 7% [3 167 644]

2021: 3% [1 265 620]

Do one bulk shop a month and fill-ups Jul – Dec 2020|2021

2020: 42% [17 700 501]

2021: 43% [18 439 949]

Mainly responsible for day-to-day household purchases Jul – Dec 2020|2021

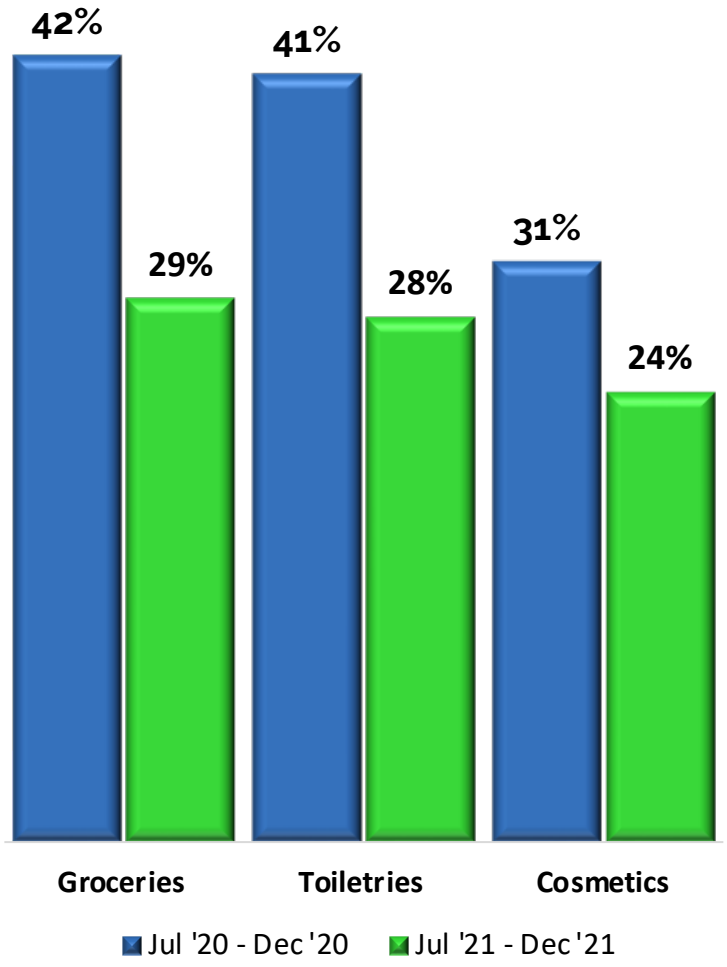
2020: 39% [16 724 228]

2021: 34% [14 615 449]

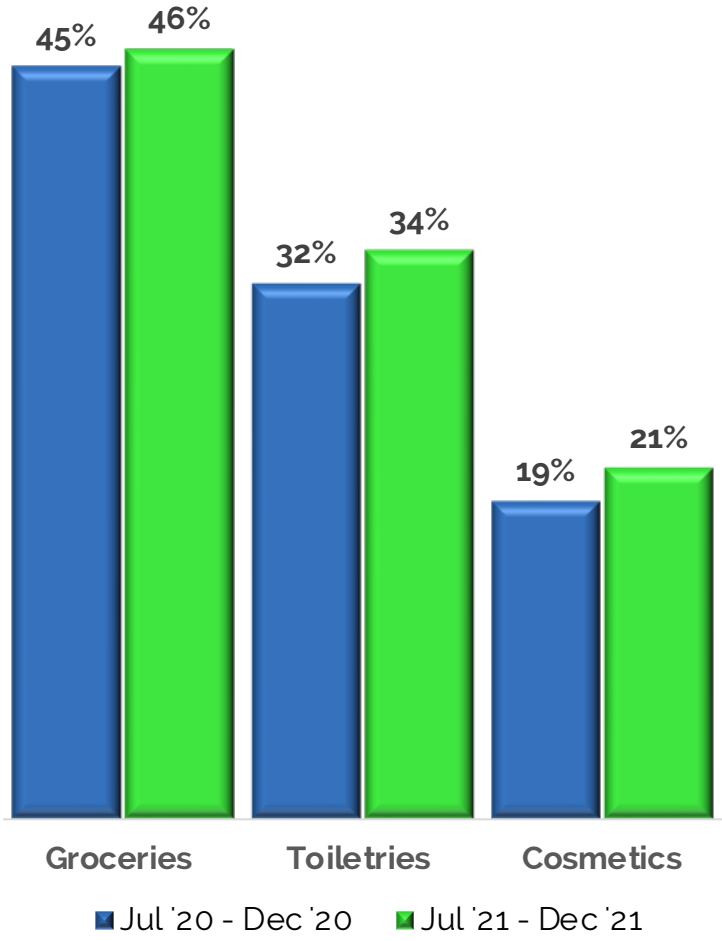
Brand Loyalty Trends

MARKETING RESEARCH FOUNDATION

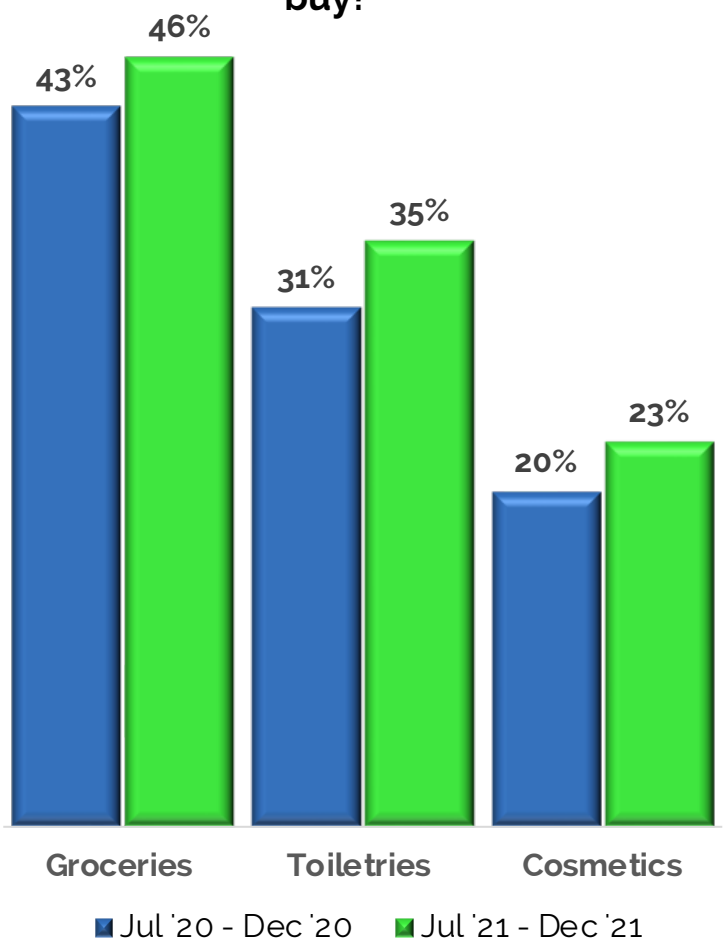
Do you always buy the same brands?



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 & Shoes

Clothing Purchases P3M

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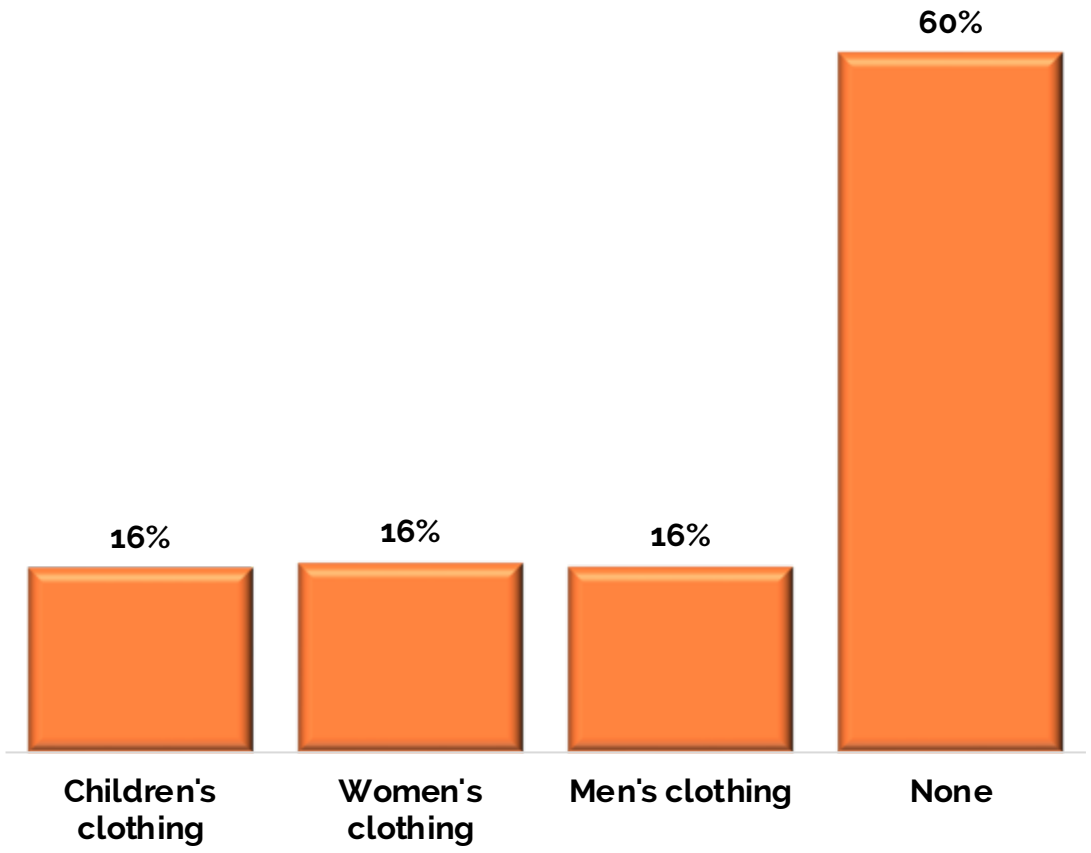
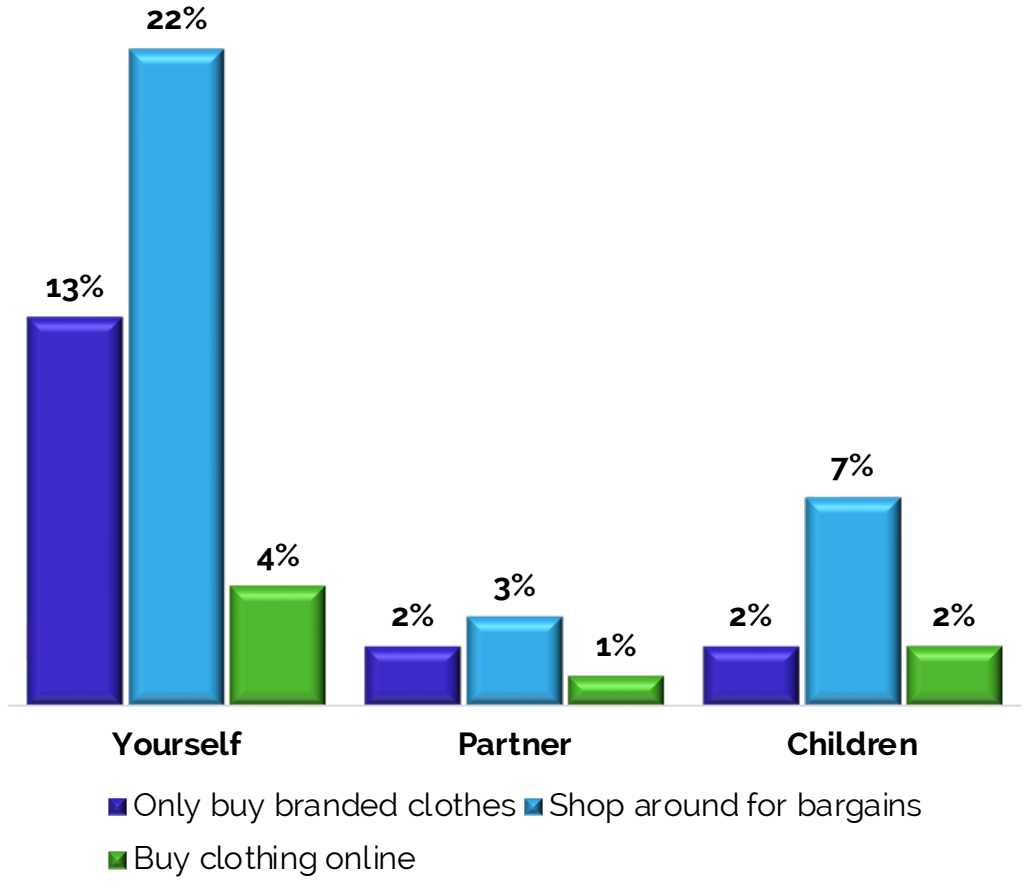
Have you bought any of the following items in the past 3 months?



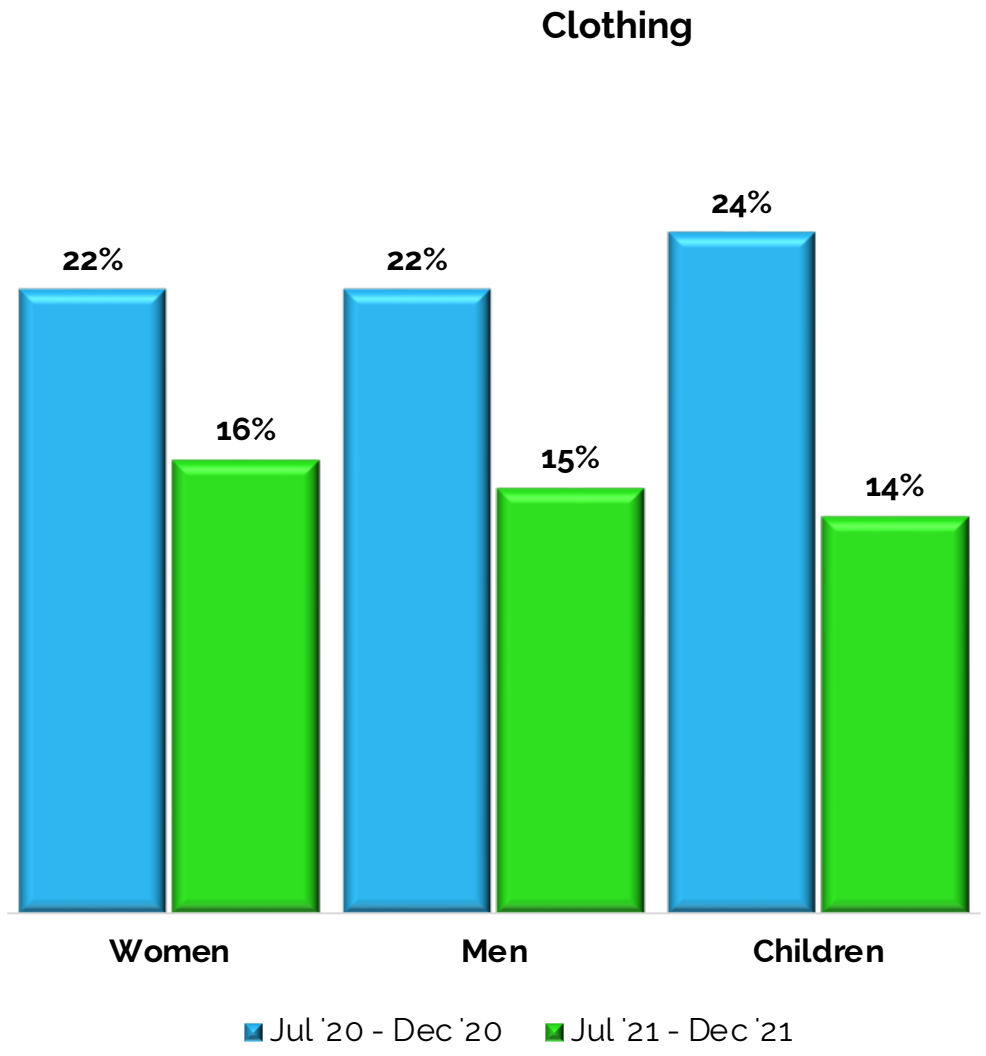
When you buy clothing, for yourself/husband/wife/partner or children, do you....?

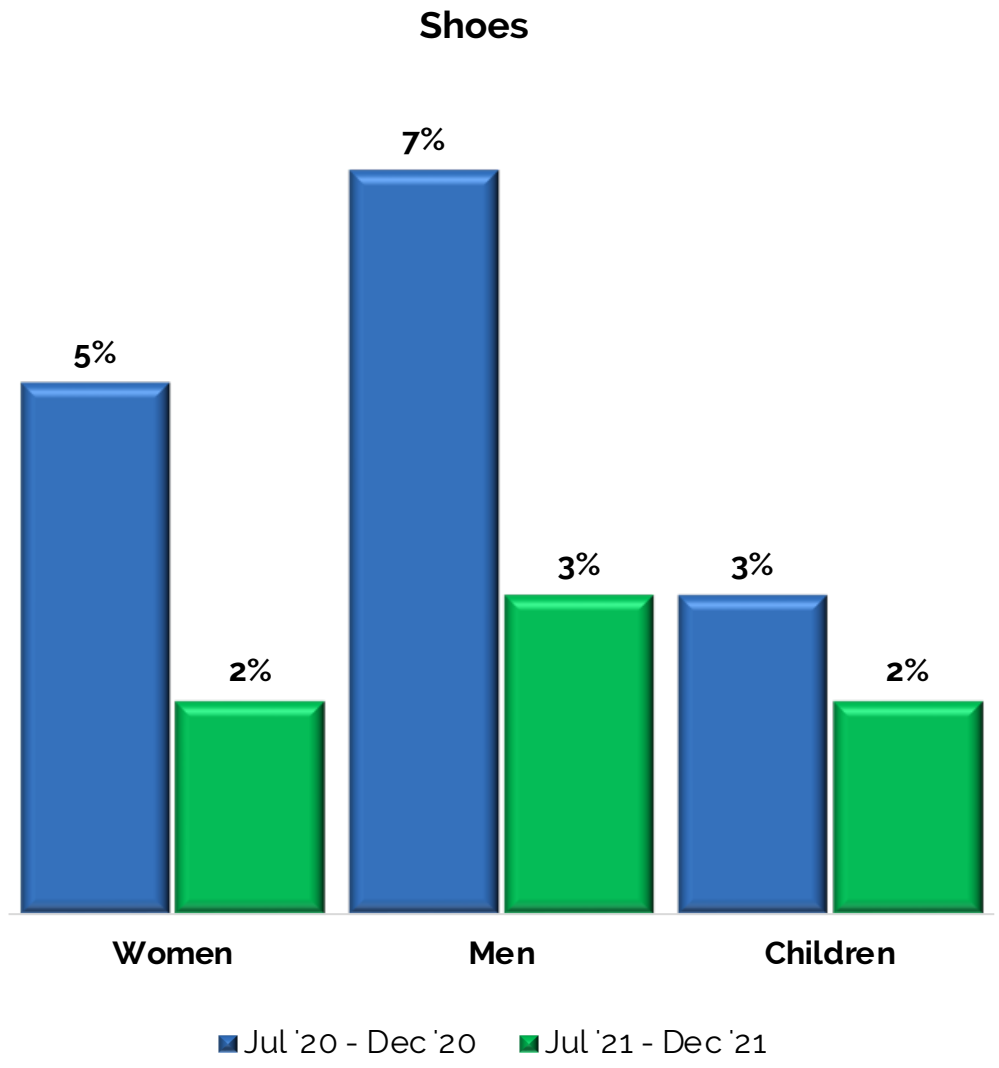


Source: MAPS 2021/2022 (Apr '21 – Mar '22)

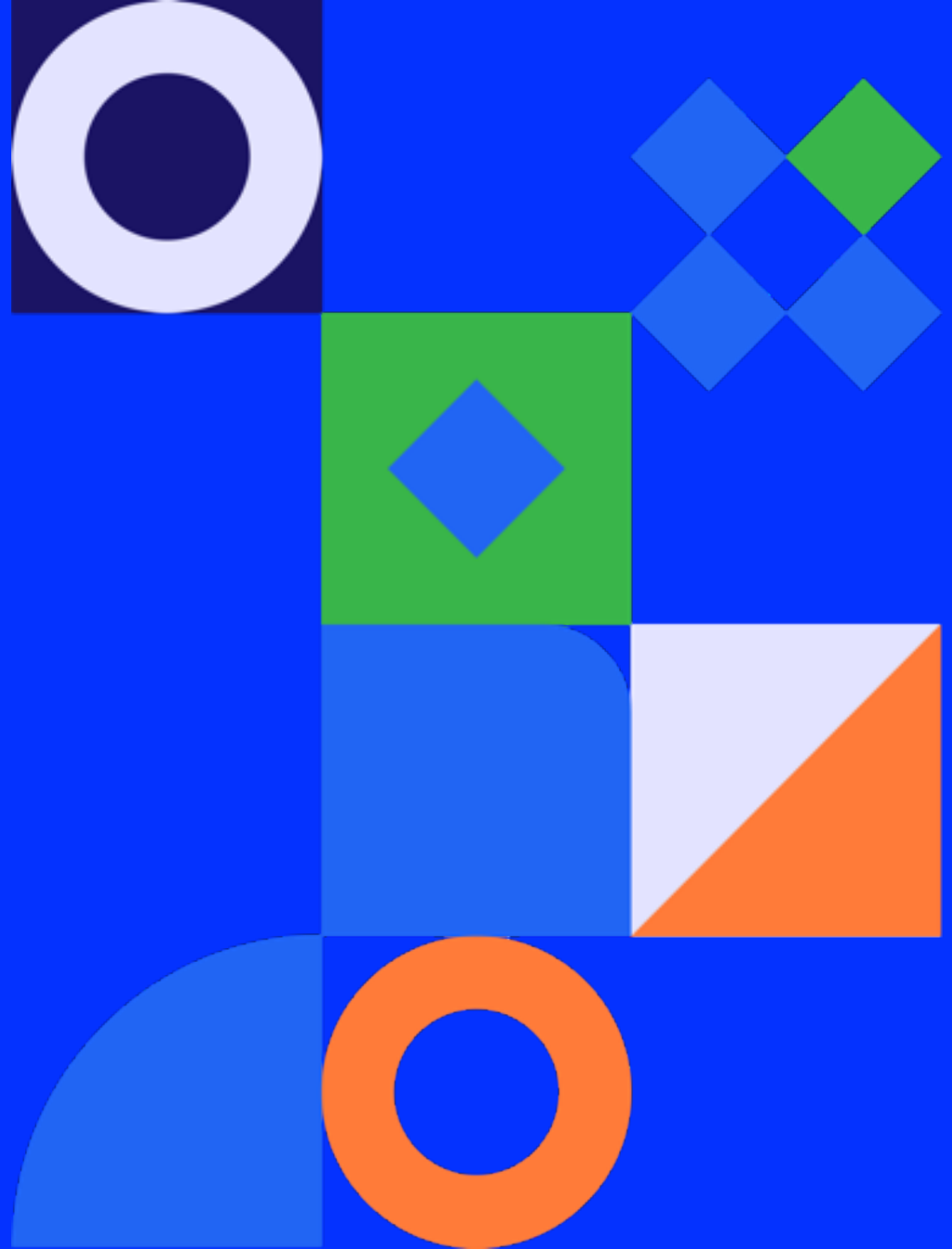
Population 15+: 43 085 487

Clothing Purchases P3M Trend





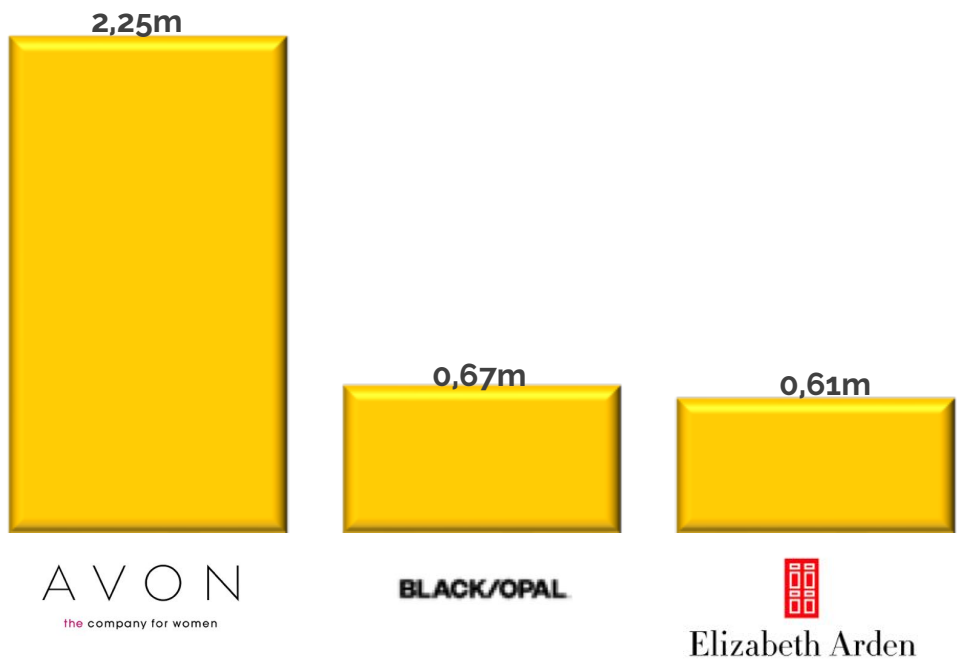
Cosmetics



Cosmetics Purchases

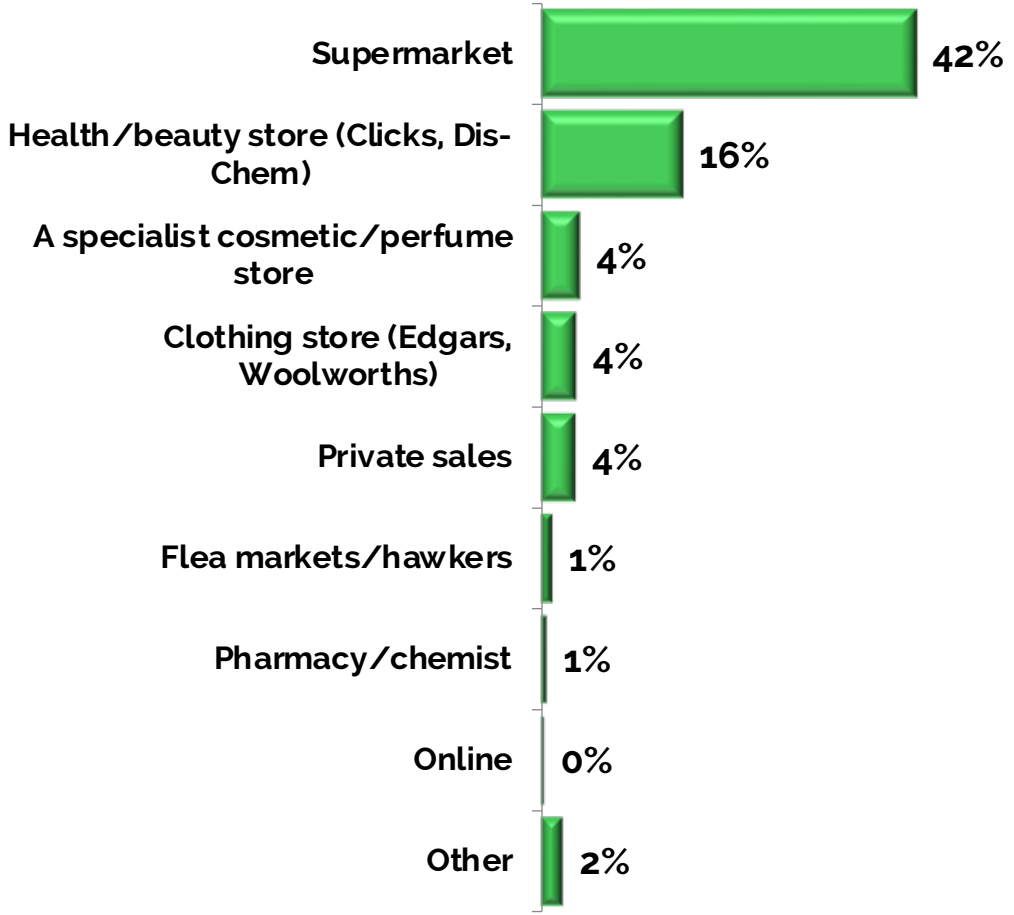
Do you ever purchase cosmetics (make-up, skincare products, perfumes/colognes)?
68% said yes.

Colour cosmetics: Top 3 brands purchased past 4 weeks

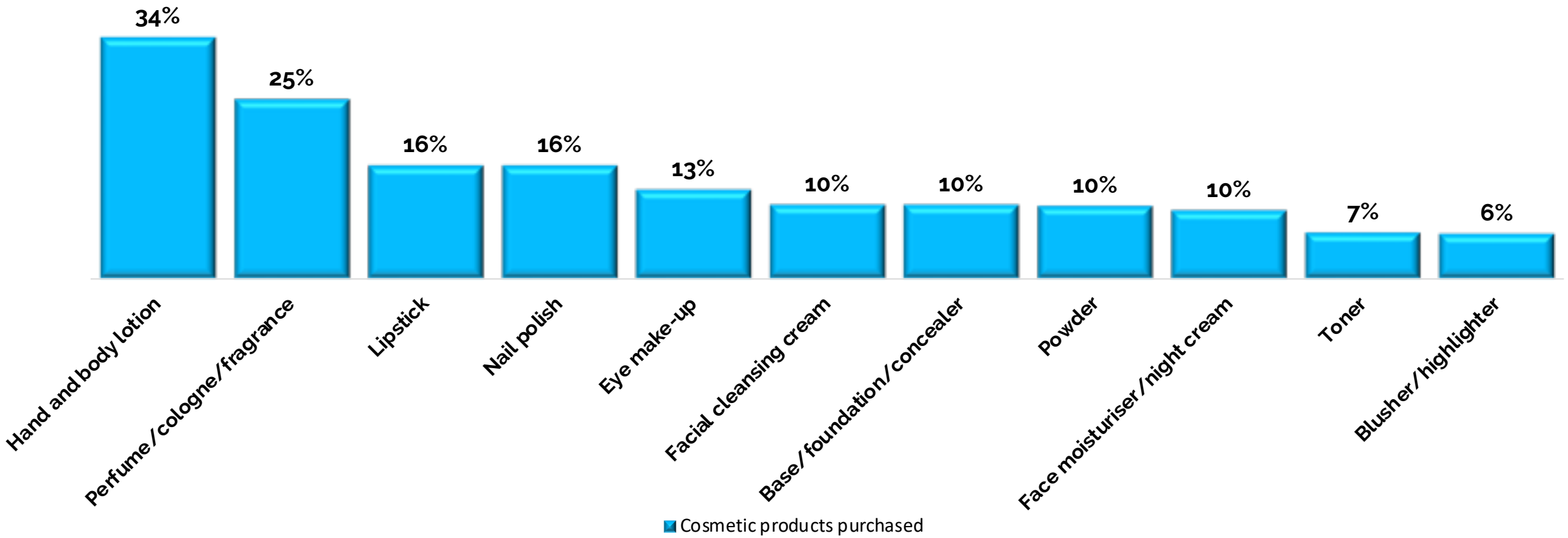


Colour cosmetics refer to products such as base, blusher, lipstick, eyeshadow, mascara etc.)

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



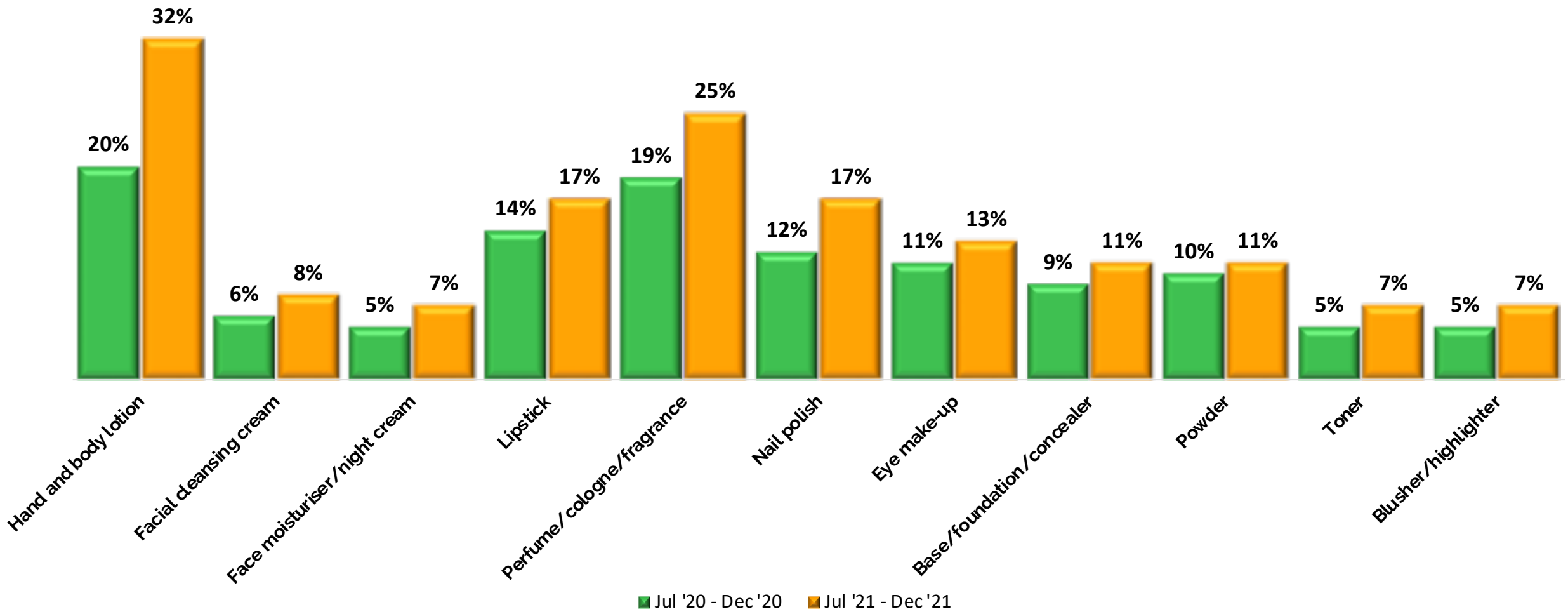
Cosmetic Products Purchased [P4W]



Source: MAPS 2021/2022 (Apr '21 – Mar '22)

Population 15+: 43 085 487

Cosmetics Usage Shifts



Cosmetics Purchases Trends [Jul-Dec '20 vs. Jul-Dec '21]

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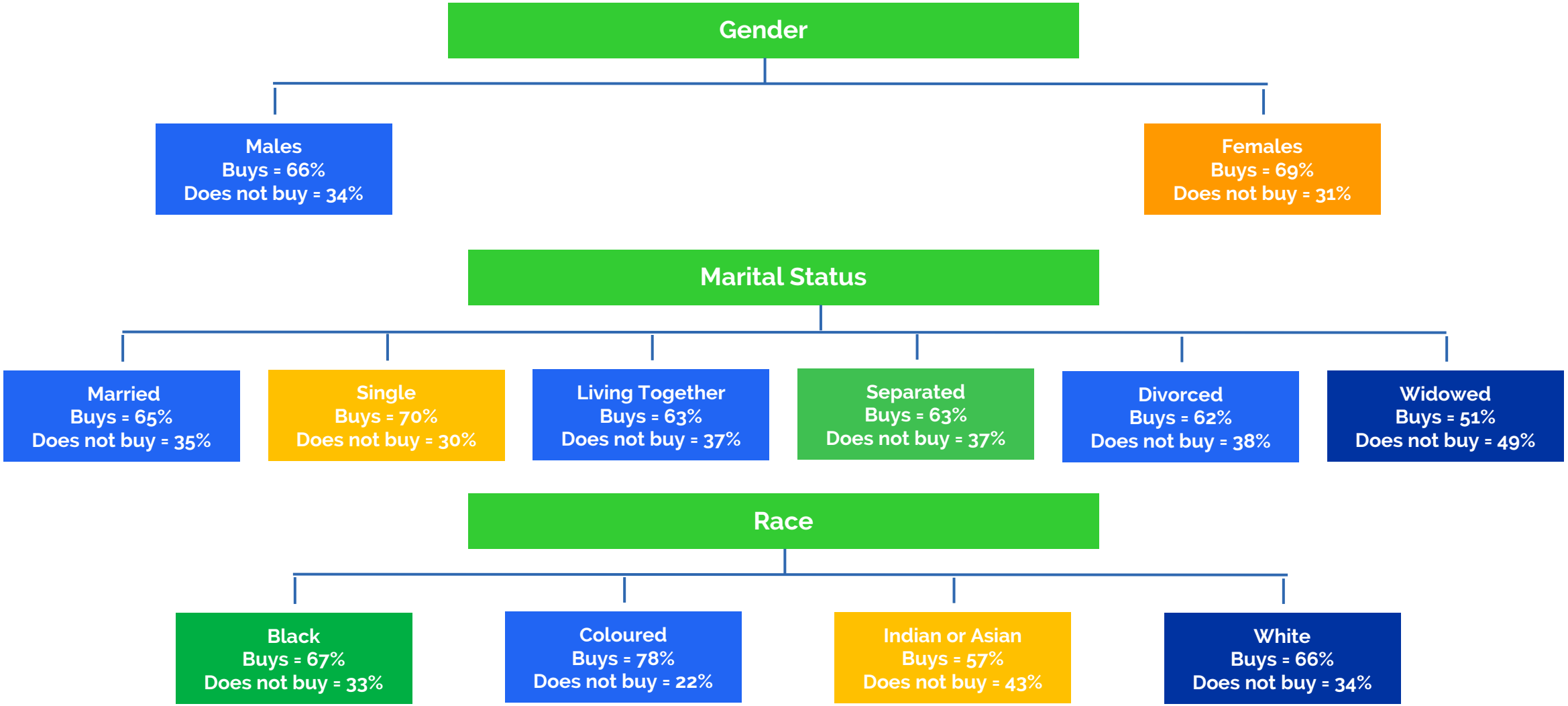
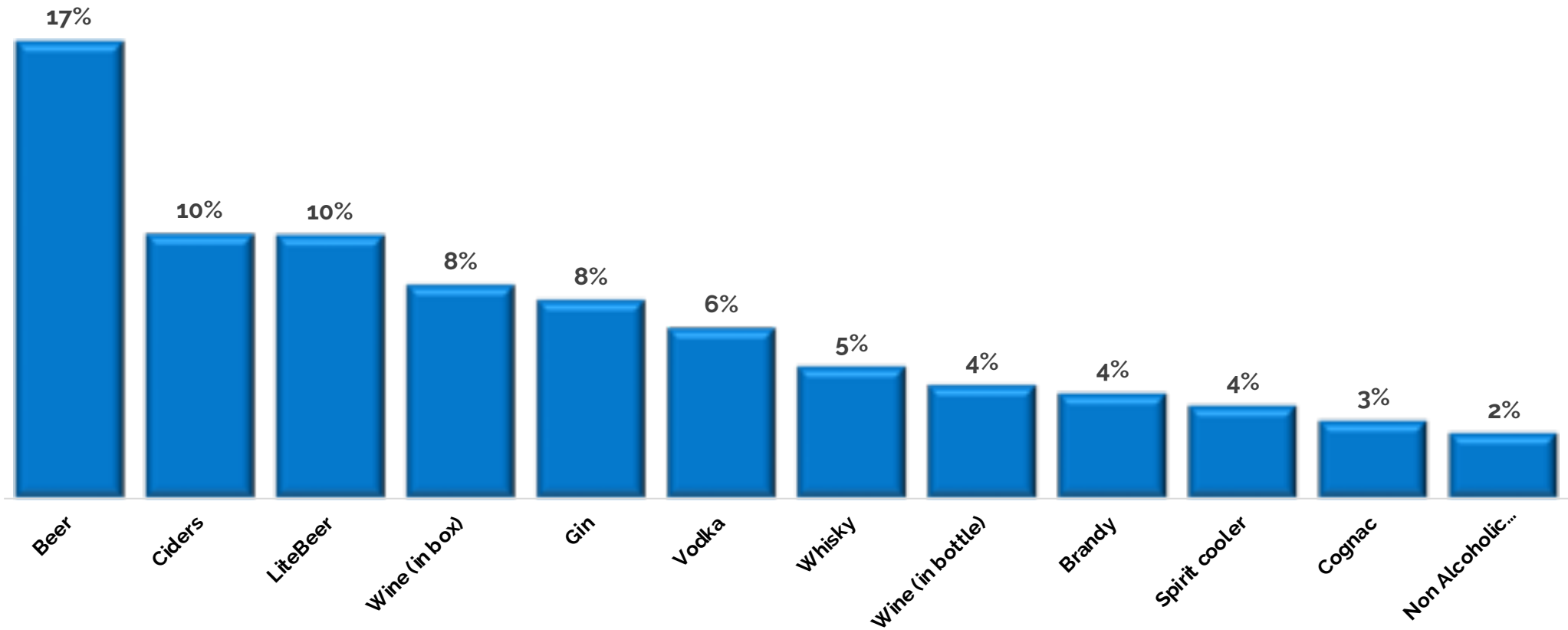


Alcohol Penetration

Alcohol Penetration P7D



Products chosen at random

Alcohol Consumption P7D Trends

MARKETING RESEARCH FOUNDATION

BEER 2020|2021

2020: 29% [12 379 789] of alcohol drinkers drink beer

2021: 20% [8 652 700] of alcohol drinkers drink beer

CIDERS 2020|2021

2020: 21% [8 838 573] of alcohol drinkers drink cider

2021: 11% [4 791 560] of alcohol drinkers drink cider

TOTAL ALCOHOL CONSUMPTION 2020|2021

2020: 68% [28 949 071] of respondents drank alcohol

2021: 60% [25 921 194] of respondents drank alcohol

NON-ALCOHOLIC BEER 2020|2021

2020: 6% [2 475 664] of alcohol drinkers drink non-alcoholic beer

2021: 3% [1 195 453] of alcohol drinkers drink non-alcoholic beer

COGNAC 2020|2021

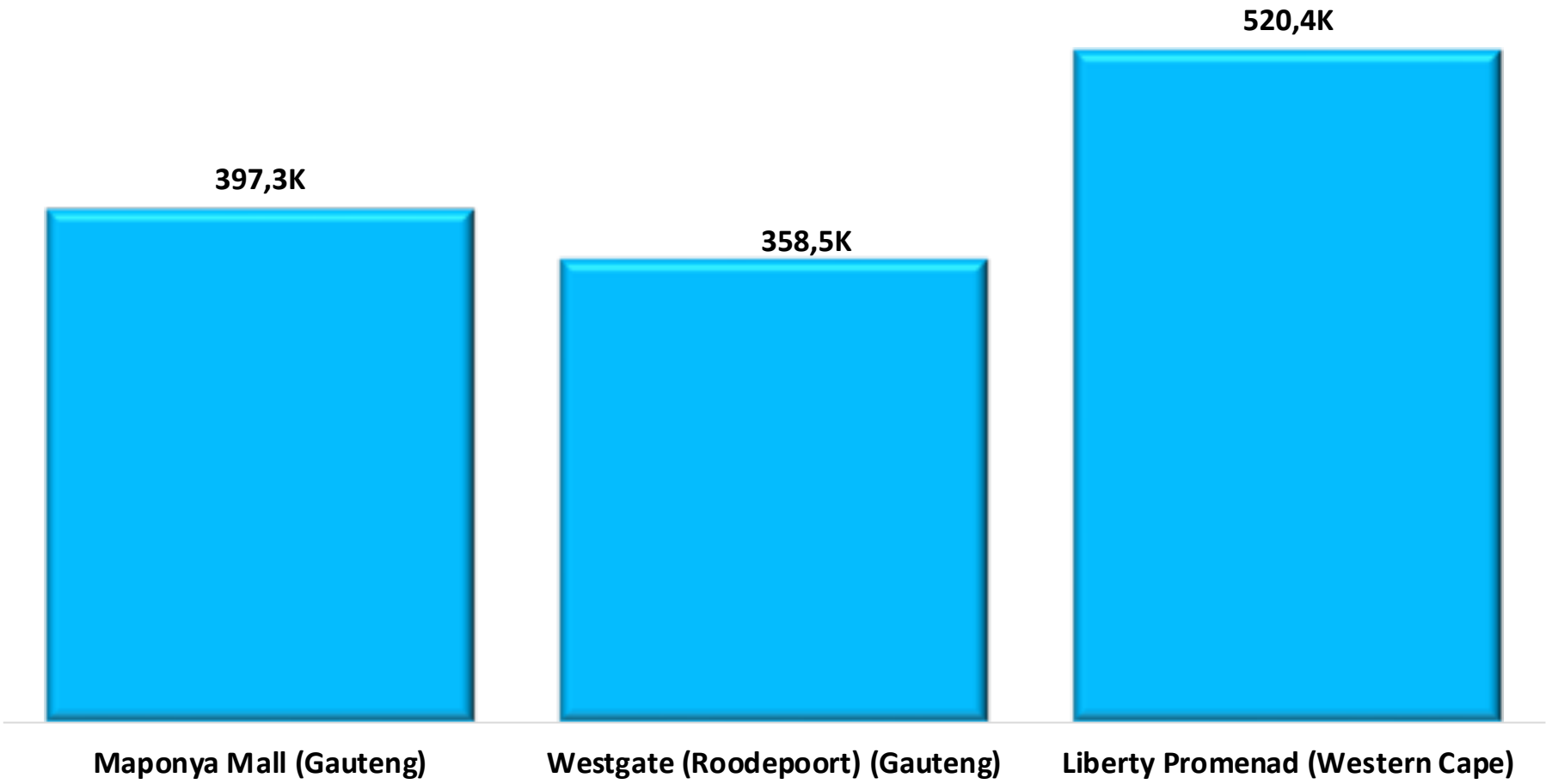
2020: 6% [2 519 661] of alcohol drinkers drink cognac

2021: 3% [1 365 285] of alcohol drinkers drink cognac

Source: MAPS 2021/2022 (Apr '21 – Mar '22)

Malls

Top Malls Visited P4W



Top Malls Visited P4W

Gauteng

1. Maponya Mall
2. Westgate Mall (Roodepoort)
3. East Rand Mall

KwaZulu-Natal

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

Western Cape

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

Mpumalanga

1. Highveld Mall
2. Tonga Mall
3. Riverside Mall

Eastern Cape

1. Circus Triangle Mall
2. Nonesi Mall
3. BT Ngebs City Shopping Centre

Free State

1. Goldfields Mall 166k
2. Twin City 114k

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 44k

Malls Visited P4W Shifts

MARKETING RESEARCH FOUNDATION

GAUTENG
Jul – Dec
2020|2021
2020: 24% [10 201 450] of respondents visited **Gauteng malls**

2021: 18% [7 637 385] of respondents visited **Gauteng malls**

WESTERN CAPE
Jul – Dec
2020|2021
2020: 8% [3 417 823] of respondents visited **Western Cape malls**

2021: 6% [2 786 985] of respondents visited **Western Cape malls**

KwaZulu-Natal
Jul – Dec
2020|2021
2020: 11% [4 859 276] of respondents visited **KwaZulu Natal malls**

2021: 7% [3 151 118] of respondents visited **KwaZulu Natal malls**

LIMPOPO
Jul – Dec
2020|2021
2020: 4% [1 620 622] of respondents visited **Limpopo malls**

2021: 2% [650 116] of respondents visited **Limpopo malls**

NATIONAL
Jul – Dec
2020|2021
2020: 66% [28 155 299] of respondents visited **malls**

2021: 48% [20 698 094] of respondents visited **malls**

NORTHERN CAPE
Jul – Dec
2020|2021
2020: 0.6% [245 901] of respondents visited **Northern Cape malls**

2021: 0.1% [62 206] of respondents visited **Northern Cape malls**

Malls Visited P4W Shifts Cont.

MARKETING RESEARCH FOUNDATION

EASTERN CAPE
Jul – Dec
2020|2021
2020: 4% [1 674 172] of respondents visited **Eastern Cape malls**

2021: 4% [1 622 910] of respondents visited **Eastern Cape malls**

FREE STATE
Jul – Dec
2020|2021
2020: 2% [962 371] of respondents visited **Free State malls**

2021: 2% [653 759] of respondents visited **Free State malls**

NATIONAL
Jul – Dec
2020|2021
2020: 66% [28 155 299] of respondents visited **malls**

2021: 48% [20 698 094] of respondents visited **malls**

NORTH WEST
Jul – Dec
2020|2021
2020: 3% [1 364 765] of respondents visited **North West malls**

2021: 2% [936 253] of respondents visited **North West malls**

MPUMALANGA
Jul – Dec
2020|2021
2020: 3% [1 330 032] of respondents visited **Mpumalanga malls**

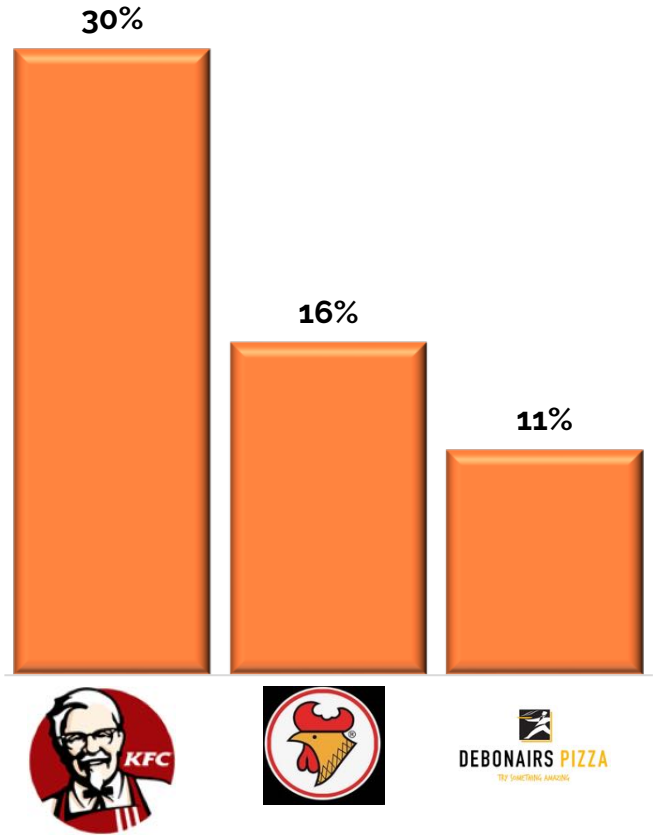
2021: 3% [1 266 388] of respondents visited **Mpumalanga malls**

Fast Food

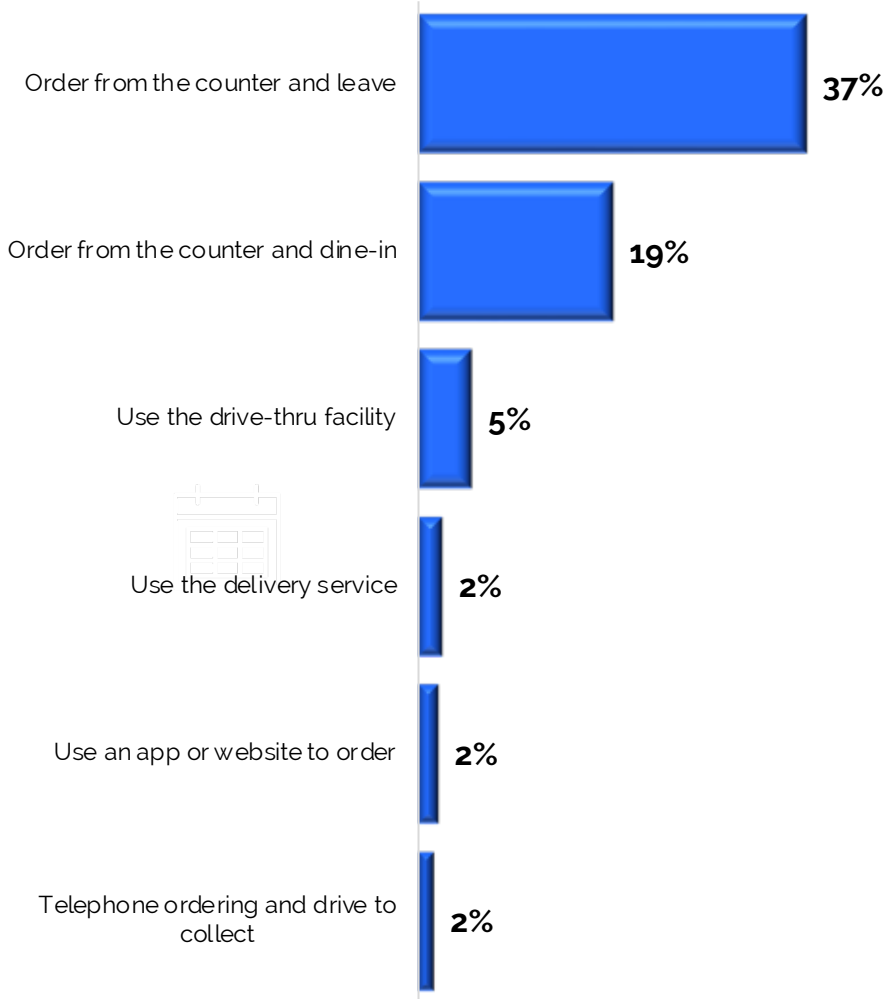
Behaviour: Fast food

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

Fast food outlet purchased from: Past 4 weeks



How do you purchase take-aways?



Source: MAPS 2021/2022 (Apr '21 – Mar '22)

Population 15+: 43 085 487

Thank You