

MAPS DATA OVERVIEW: Jan '21 – Dec '22

JULY 2023



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Scope of MAPS

Life Stages and Lifestyle



- Demographics
- Income
- Employment
- Property 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



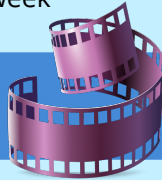
- Radio stations listened to (past 4 weeks, past 7 days and yesterday)
- Average number of days/hours spent radio listening per week

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
- 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

Scope of MAPS

Number of questions covered

- Total Questions = 700
- Total Brands = 3 350



Behaviour & Brands (leave behind)

- Total Questions = 414
- Behaviour questions = 112
- Non FMCG Brands = 219
- FMCG Questions = 302
- FMCG Categories = 151
- FMCG Brands = 1 868



Face to Face

- Questions = 286
- Brands (non FMCG) = 1263

Fieldwork Landscape



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Research Universe and Methodology

Two research collection instruments for the MAPS study:



Face-to-face
questionnaire



The leave behind
questionnaire (diary)



Average interview
length: 45-60 min

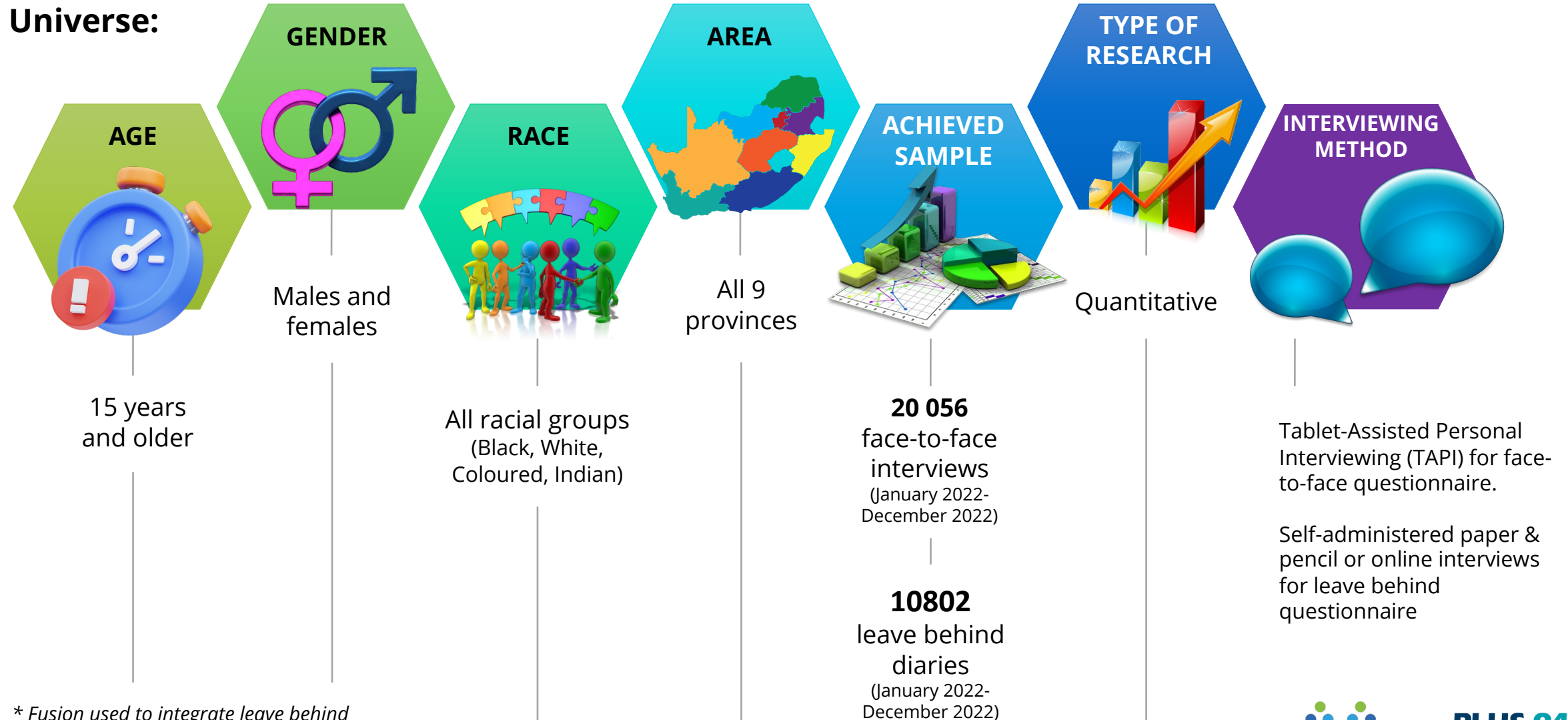


3 and 5 days to
complete the diary



Research Universe and Methodology

Universe:



* Fusion used to integrate leave behind questionnaires into full sample.

Sampling



Distribution:



50%
Metro



30%
Urban



20%
Rural

Fieldwork Landscape

- 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**

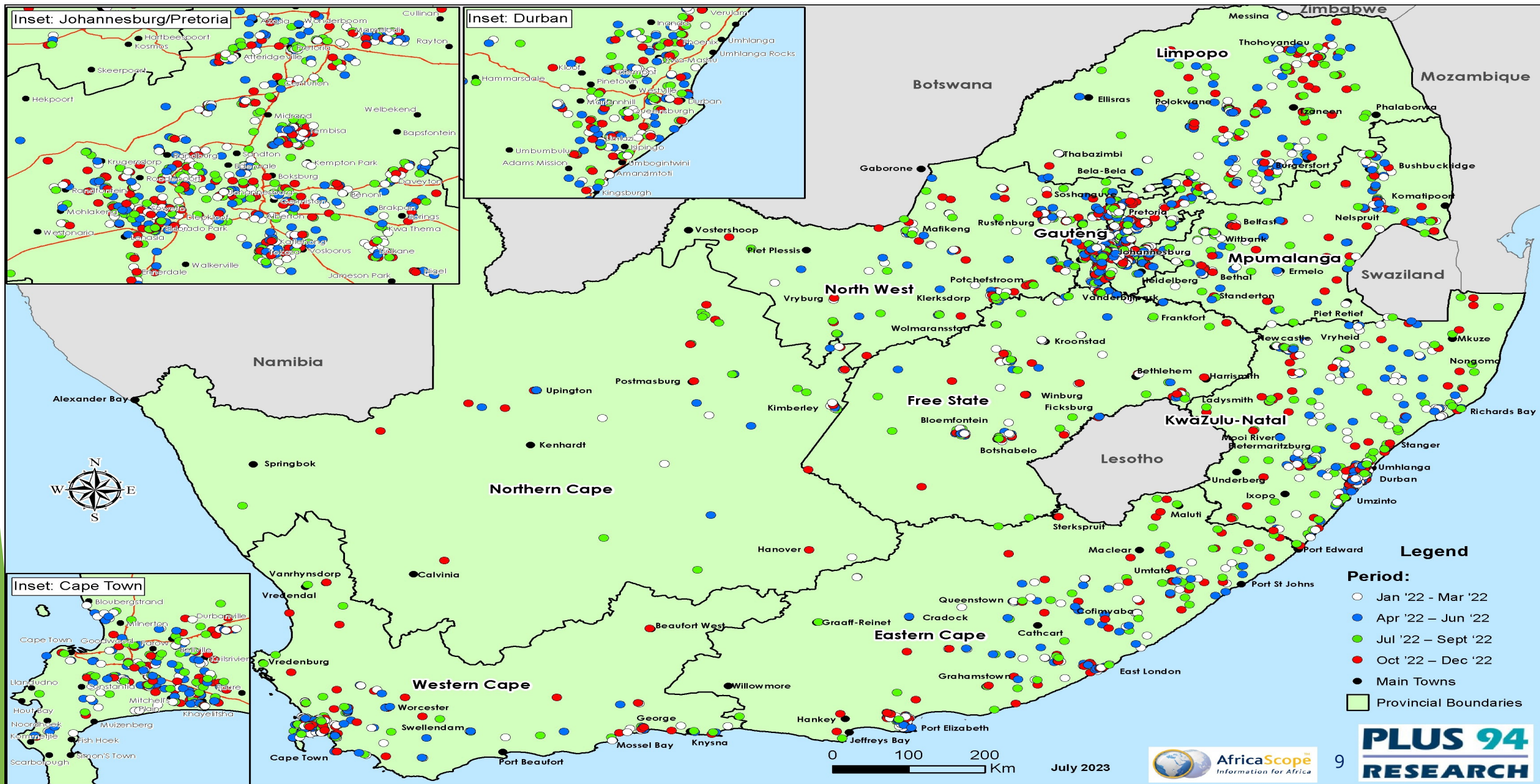
**All cities and large
towns sampled**

**All districts
sampled**

**All municipalities
sampled**

- Weighted to population.
- GIS mapping to validate EAs upfront- reduces substitution rate
- GIS mapping to randomly select 8 visitation points (homesteads)
- 4 possible substitution points in each EA.
- Post fieldwork verification through GIS mapping (achieved vs planned)

Fieldwork – Points visited



Back Checking



Recording

- 25% of sample
- 25% per interviewer
- Confirm demographic variables
- Confirm Kish Grid compliance
- Report produced per DIP
- Cheated interviews Flagged
- Flagged interviews ➡ Telephonic



Telephonic

- 25% of sample
- 25% of interviewer
- Confirm demographic variables
- Confirm Kish Grid compliance
- 3 calls are made per respondent
- Daily targets to Call centre agents and reviewed Monthly
- All calls recorded and quality checked



Physical

- 25% of sample
- 25% per interviewer
- Confirm demographic variables
- Confirm Kish Grid compliance
- Ops Execs conduct back checks on Physical Back Checks
- Assessed on a weekly basis

Interviewer Trend Assessment

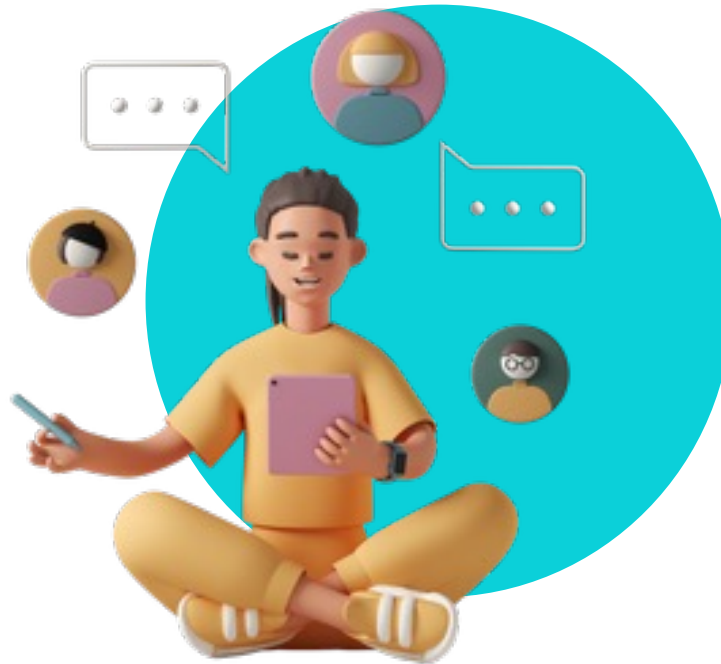
1

Trend analysis per interviewer



2

On trend identification – Interviewer's work is subjected to telephonic back-checks



3

Back checks to confirm respondent participation, Kish Grid compliance and validity of demographic variables.



GIS Auditing

Unique to MAPS

The research method used in MAPS requires that surveys be completed at unique sampled points using GPS co-ordinates.

Interviewers in field are issued with co-ordinates that lead them to the sampled households.

The TAPI system currently in use auto captures GPS co-ordinates when interviewers are completing surveys.

Co-ordinates are captured in the beginning of the survey, in the middle of the survey and at the end of the survey.

The revised approach to GPS location capturing involves capturing location at the commencement of survey, at 50% completion and at closing of survey.

Assessment of the GIS data is done at two levels:

If a survey fails a GIS audit, such survey is removed from the data set.

Level 1:

1

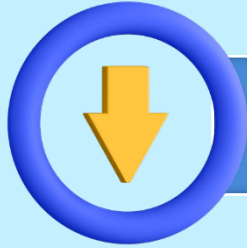
Consistency assessment of the three captured GPS points.

Level 2:

2

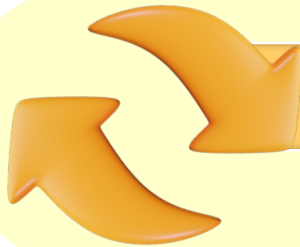
Deviance assessment of the sampled point and first captured GPS point with a tolerance deviation of 25 metres.

QC Reports



MONTH

- GIS audit report
- Recordings BC Reports
- Telephonic BC Reports
- Physical BC Reports
- Technical Reports
- Logic Test Reports
- Interviewer Trends
- Paper Diary Audit Report



QUARTER

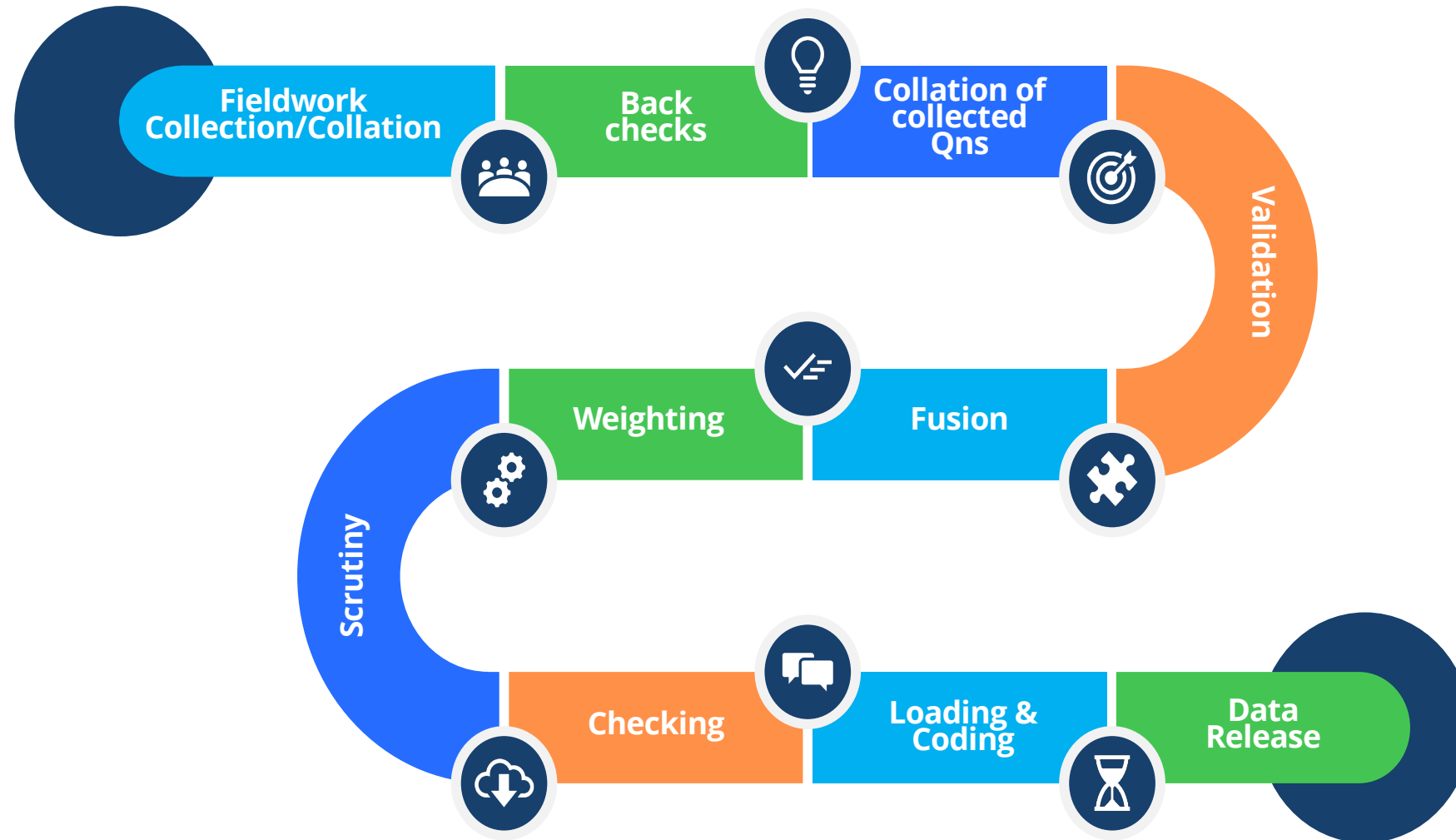
- Interviewer Trend Report
- Technical Report
- Interviewer Performance Report
- Incidents Report



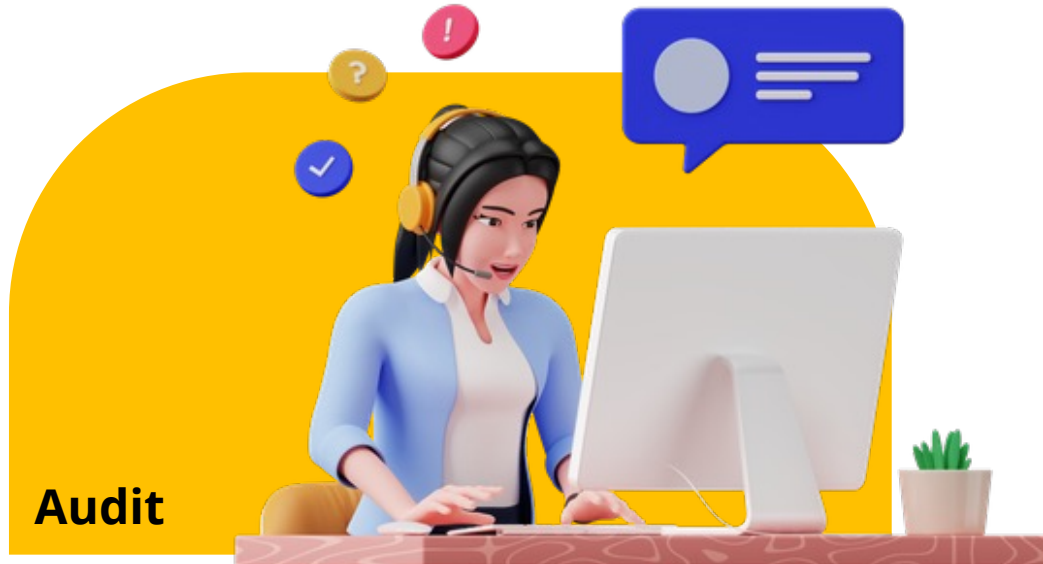
6 MONTHS

- Data normality reports
- Interviewer Trends
- Training recommendations

Data Preparation and Release Process



Audit – Aug/Sept 2022



Audit

12-month dataset (Jan'21-Dec'21)

- Aug/Sept 2022 – audited by 3M3A, an international auditing company
- All systems and processes
- Stability of data checked



Outcome

- Clean bill of health
- Improve overall QC:
 - Data Capturing
 - Data Handling
 - Meta Data on processes
 - Fieldwork
- Design- improve sample spread
- Weighting



Demographics

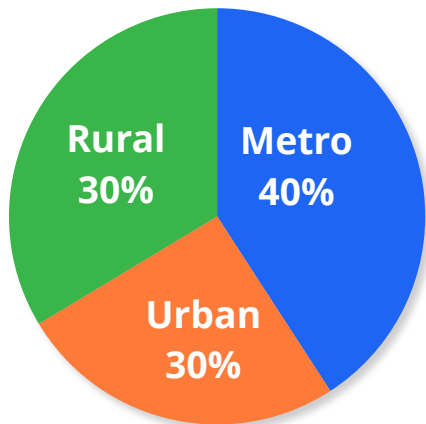


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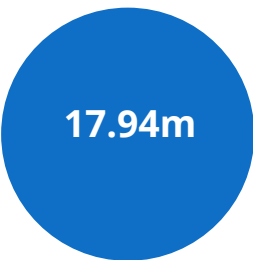
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Demographics: Jan'22 – Dec'22

Area Distribution



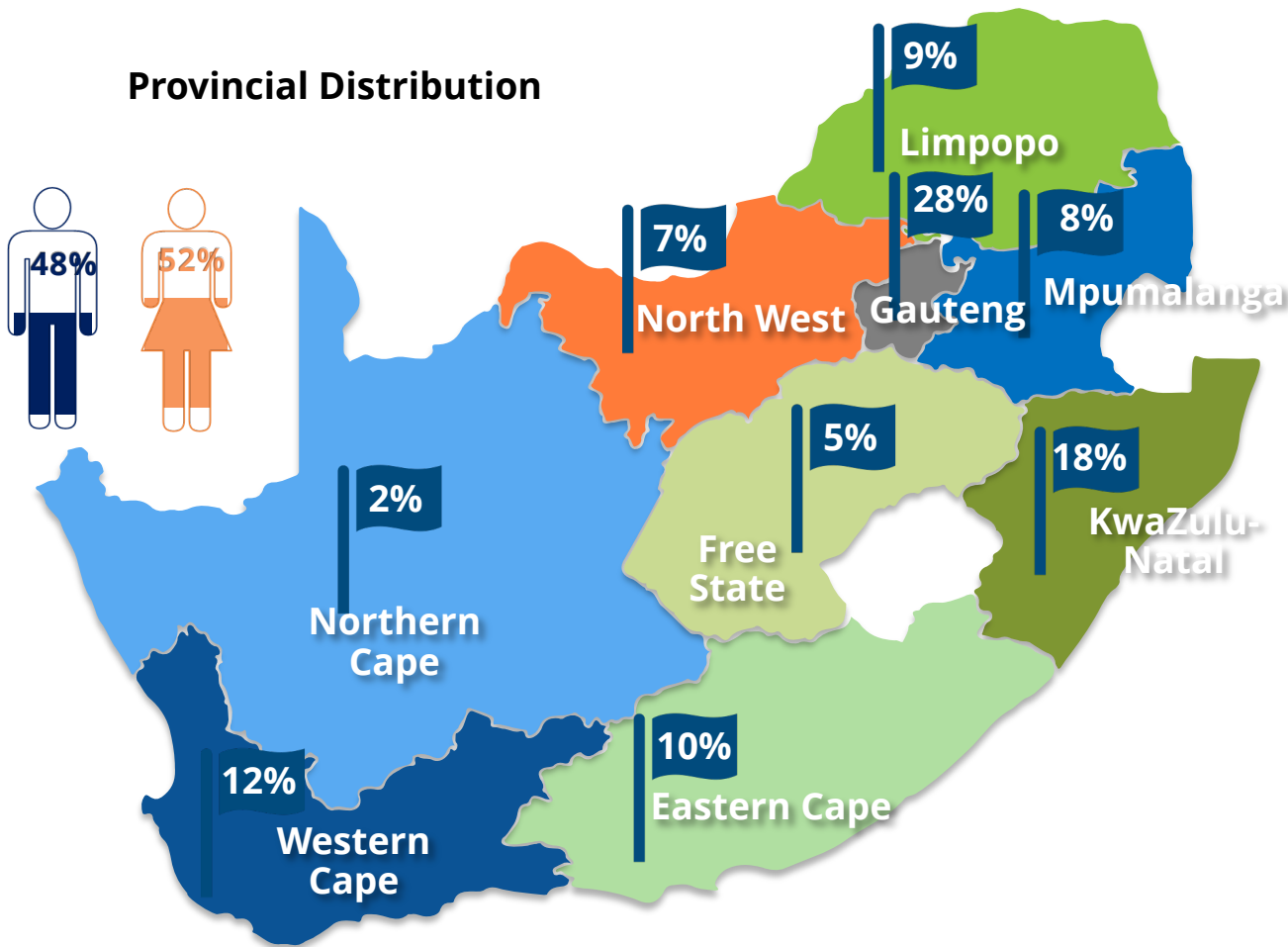
Households



People per household



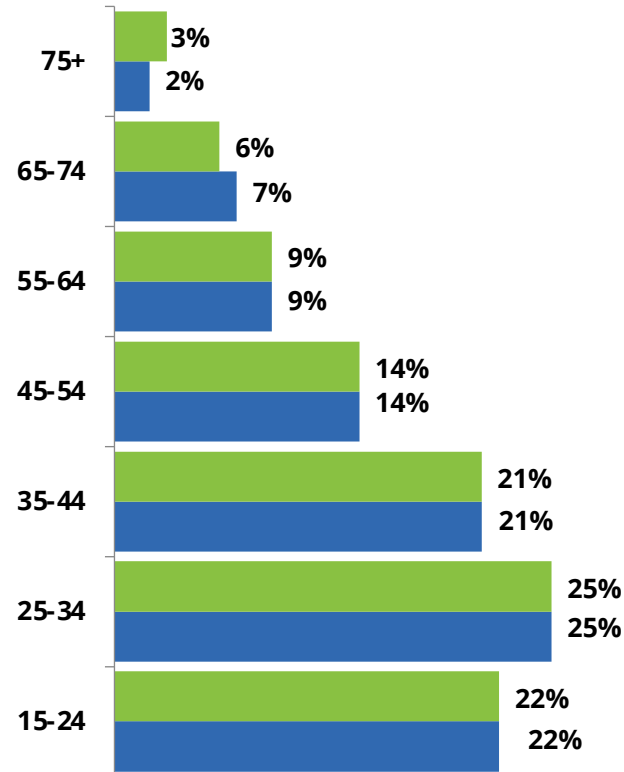
Provincial Distribution



*According to StatsSA (2022), the South African population is 60.6 million people.

Demographics

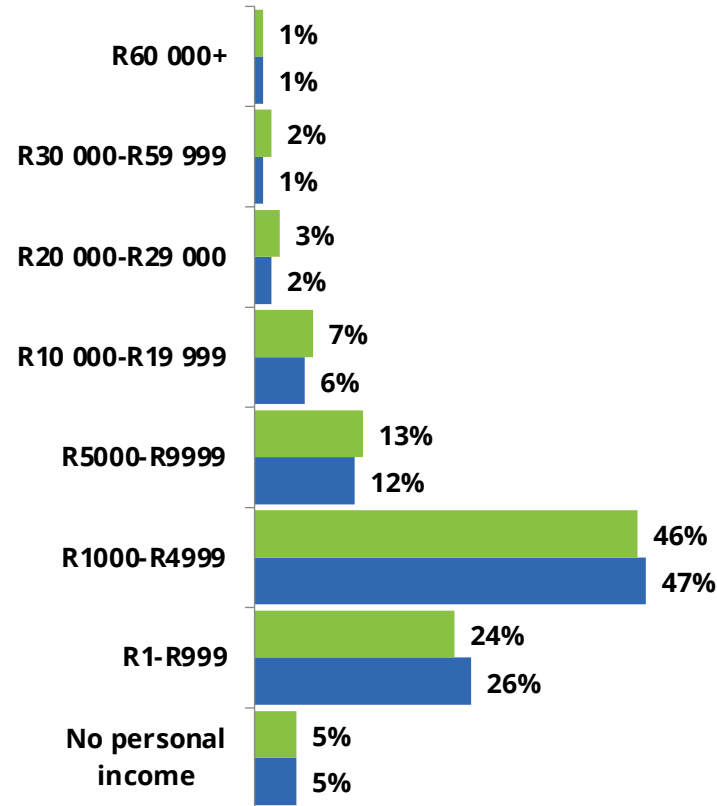
Age Groups



Average age is 38 years

Average age 38 years

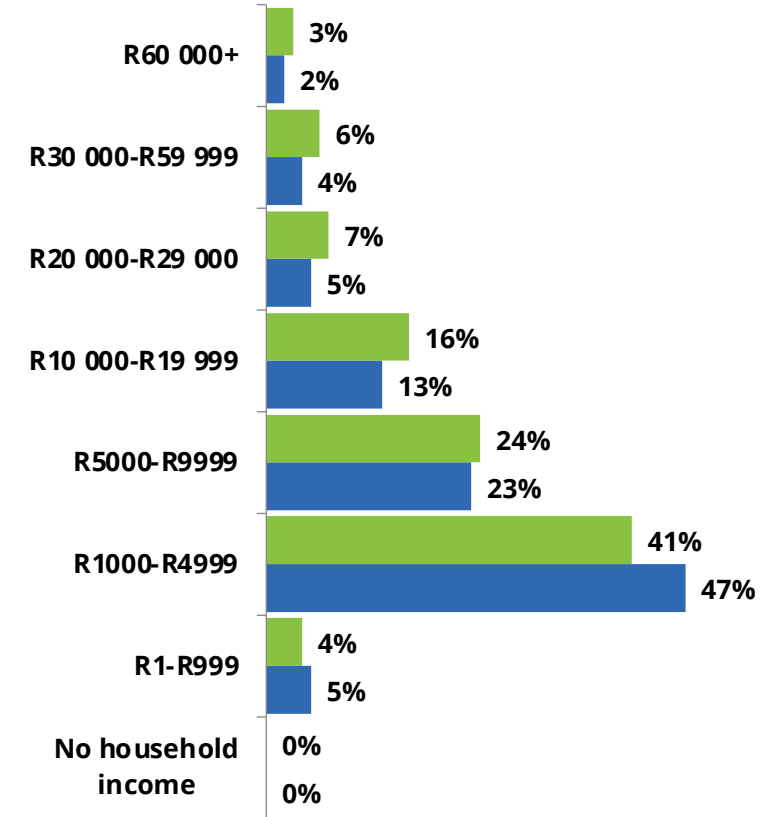
Personal Income



Average personal income: R4883

Average personal income: R4438

Household Income

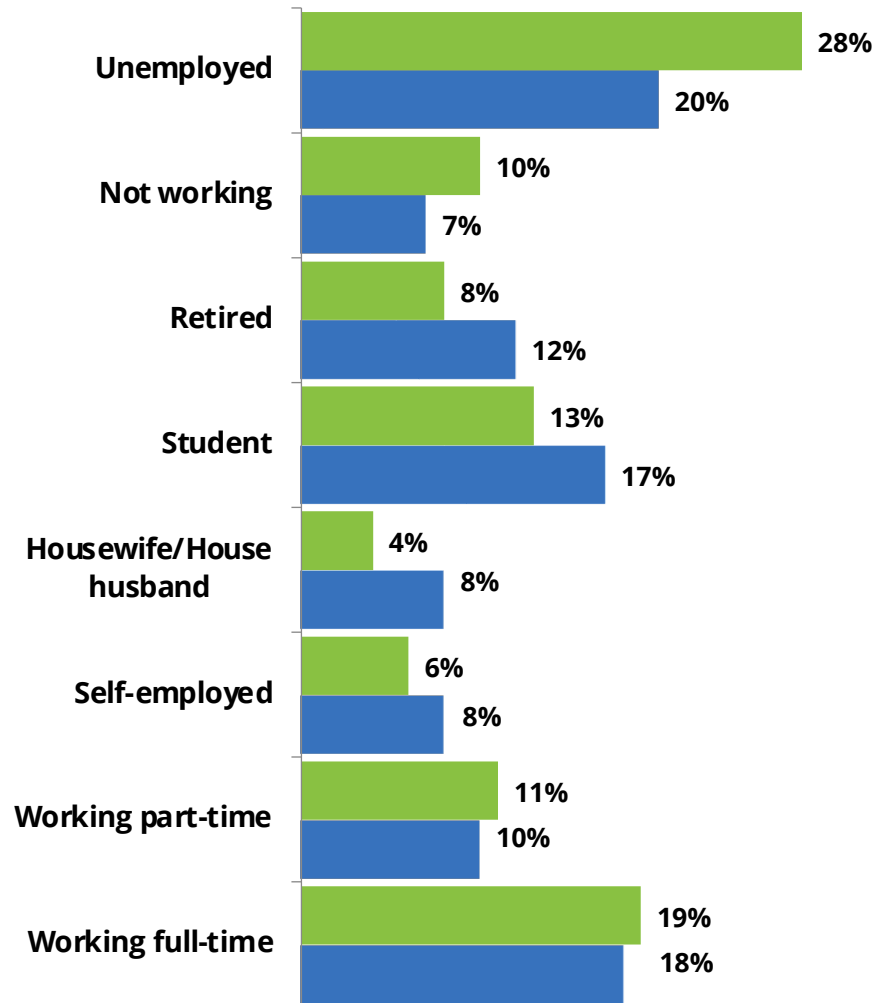


Average household income: R11 648

Average household income: R9 973

Demographics

Work Status

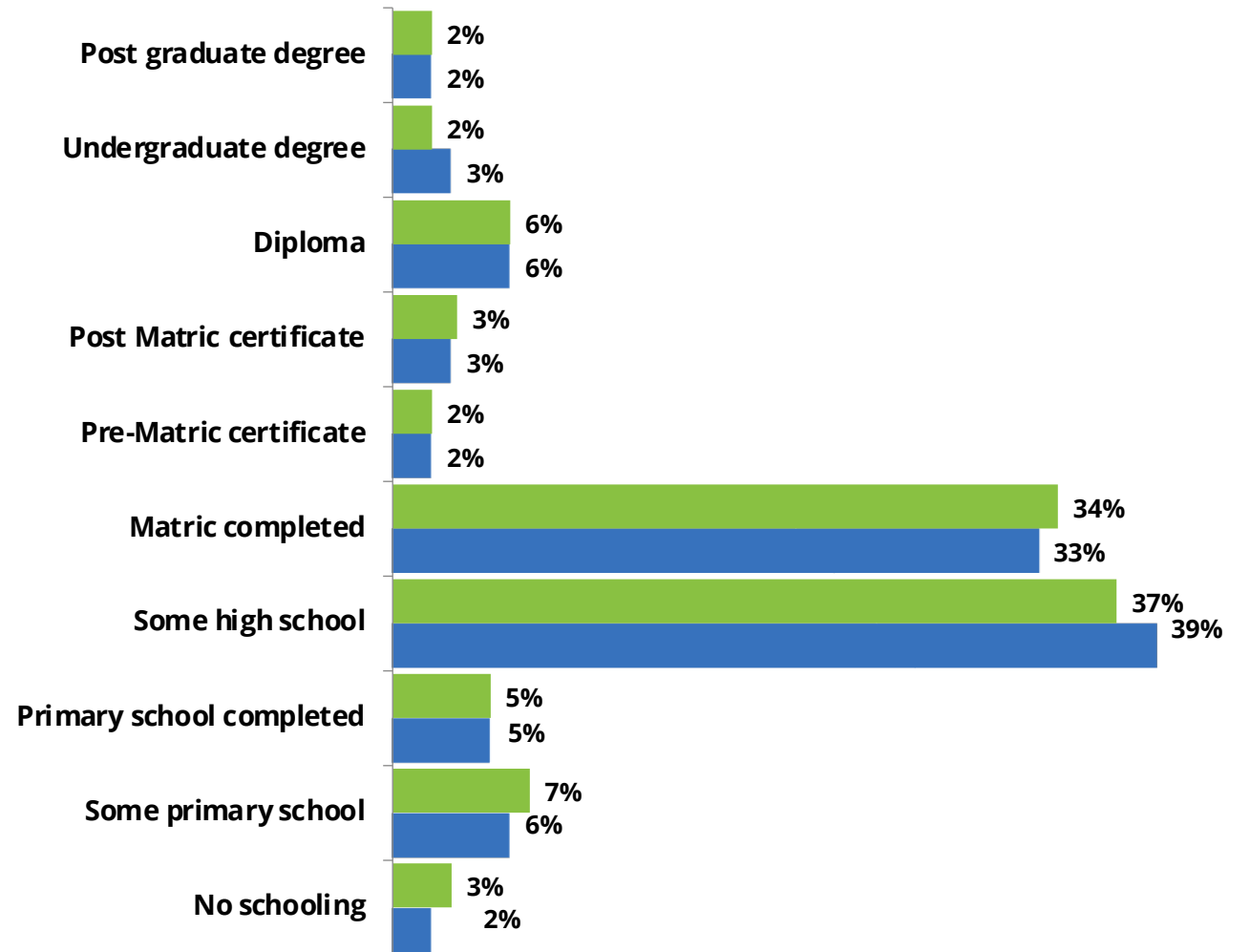


*According to StatsSA, 7,7 million people are unemployed.

Jan'21-Dec'21 Pop 15+: 43 099 774

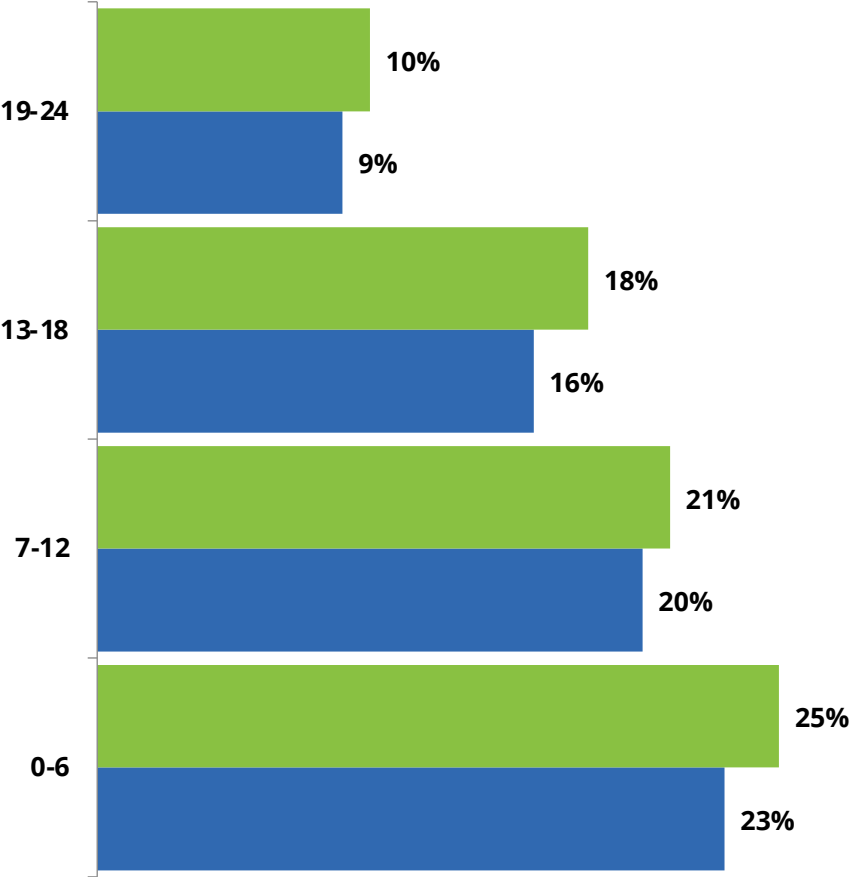
Jan'22-Dec'22 Pop 15+: 43 592 223

Highest Level of Education Achieved

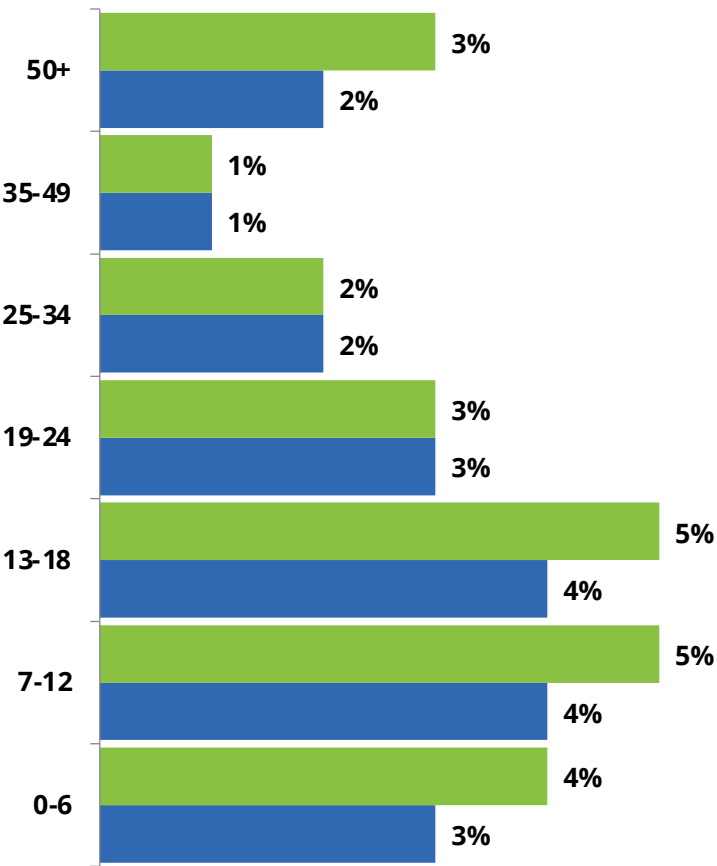


Demographics Cont.

Age of Dependents (own children)



Age of Other dependents (not own children)

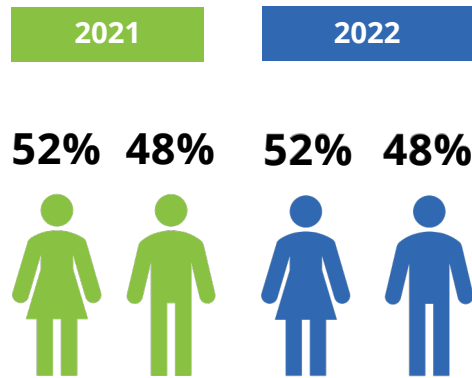


Population - % YOY

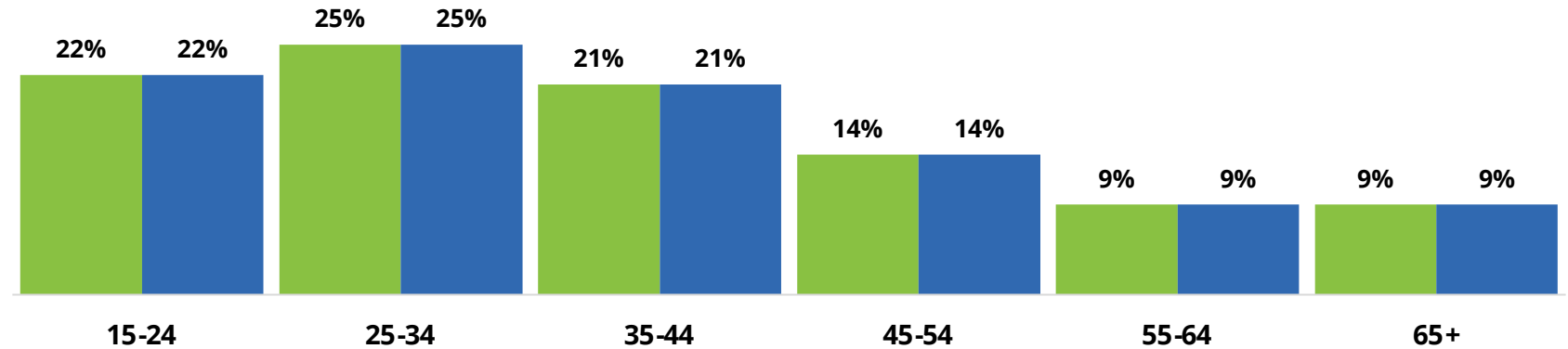
Jan'21- Dec'21

Jan'22 - Dec'22

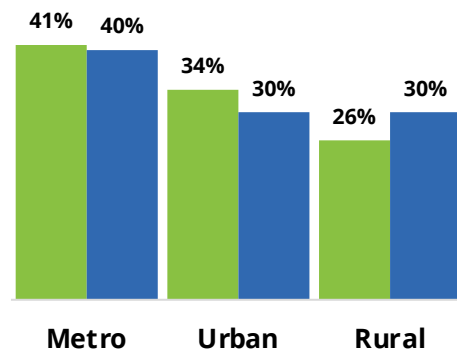
Gender



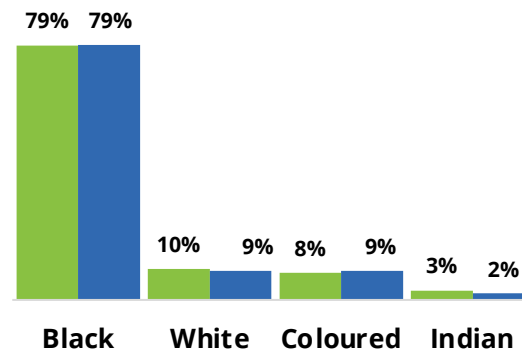
Age Groups



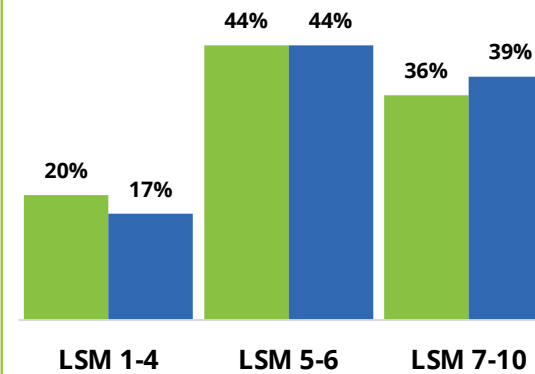
Area



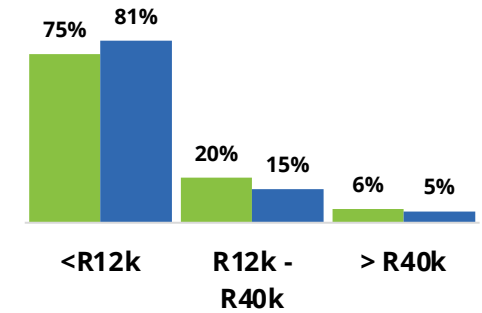
Race



LSM



Monthly Household Income



Jan'21-Dec'21 Pop 15+: 43 099 774

Jan'22- Dec'22 Pop 15+: 43 592 223

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

In Development

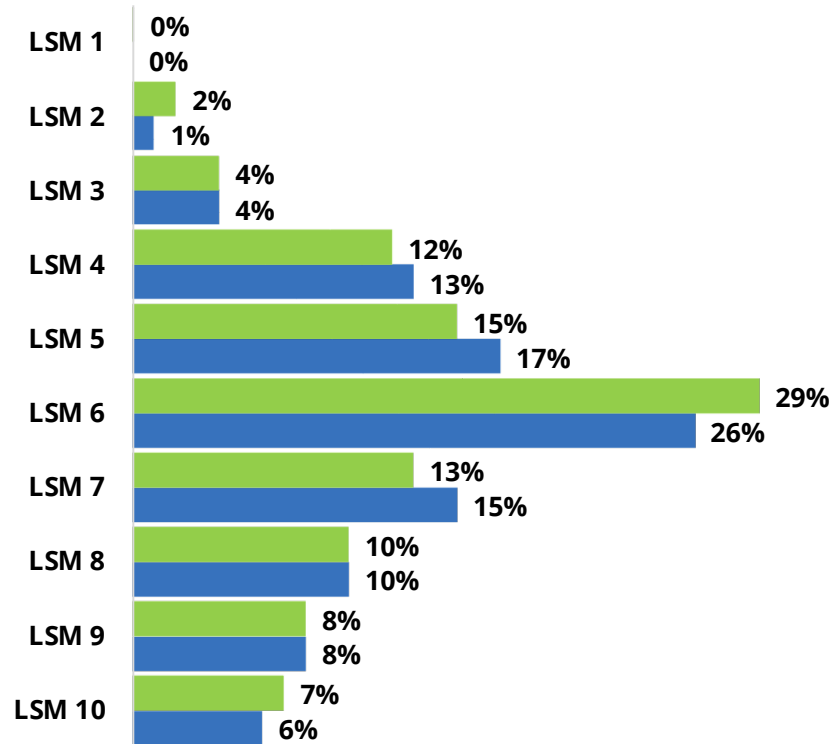
- Testing possible update of LSM
- Piloting New Segmentation models

Demographics

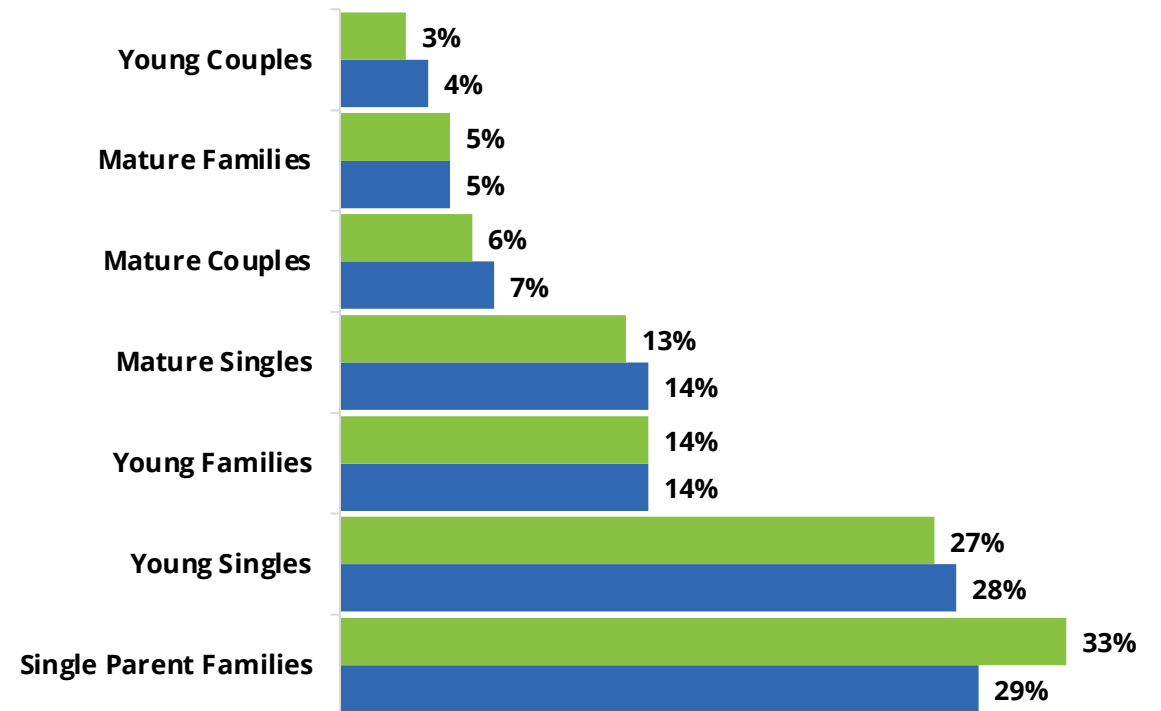
- Average number of households in South Africa
- Average age of respondents
- Racial profiles of respondents
- Gender profiles of respondents
- Most spoken languages
- Marital status of respondents
- Highest level of education
- Dependents living in the household – own children
- Dependents living in the household – not own children
- Generation (Global and PEW)
- Life Stages
- Personal income
- Household income
- Employment status

Segmentation Shifts

LSM



Life Stages



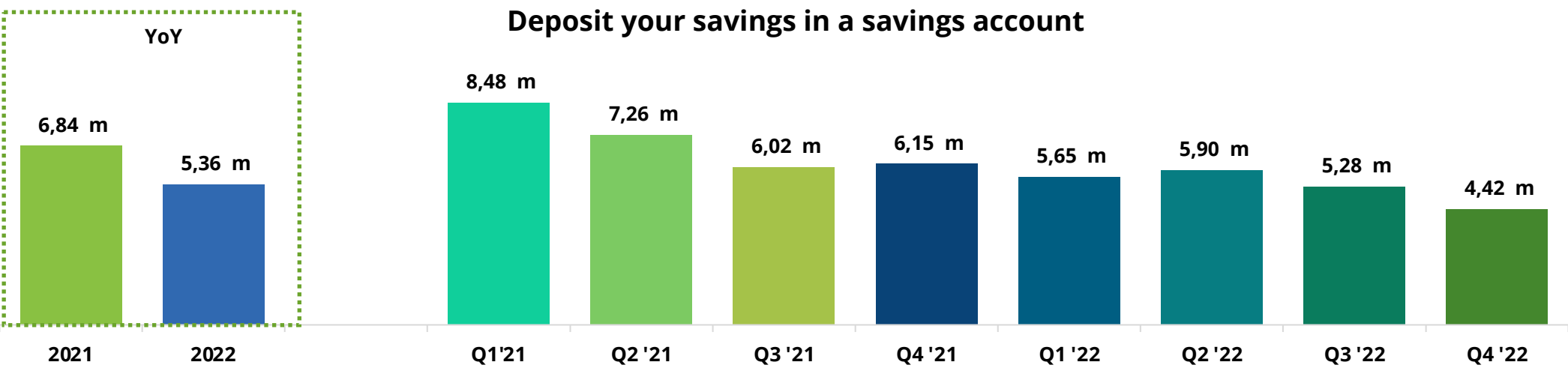
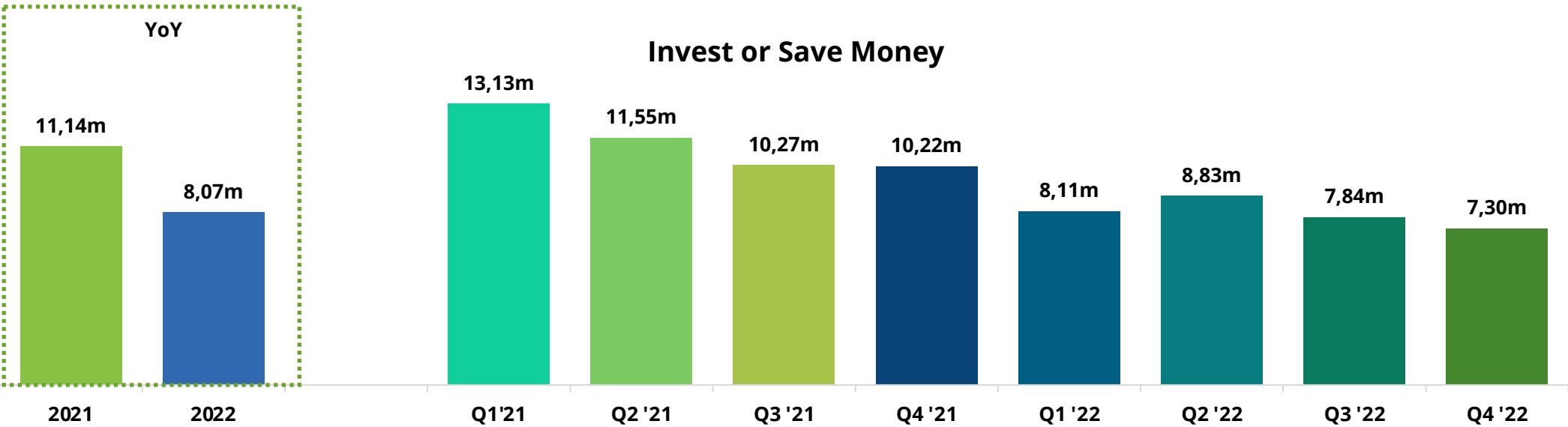
Economic Landscape



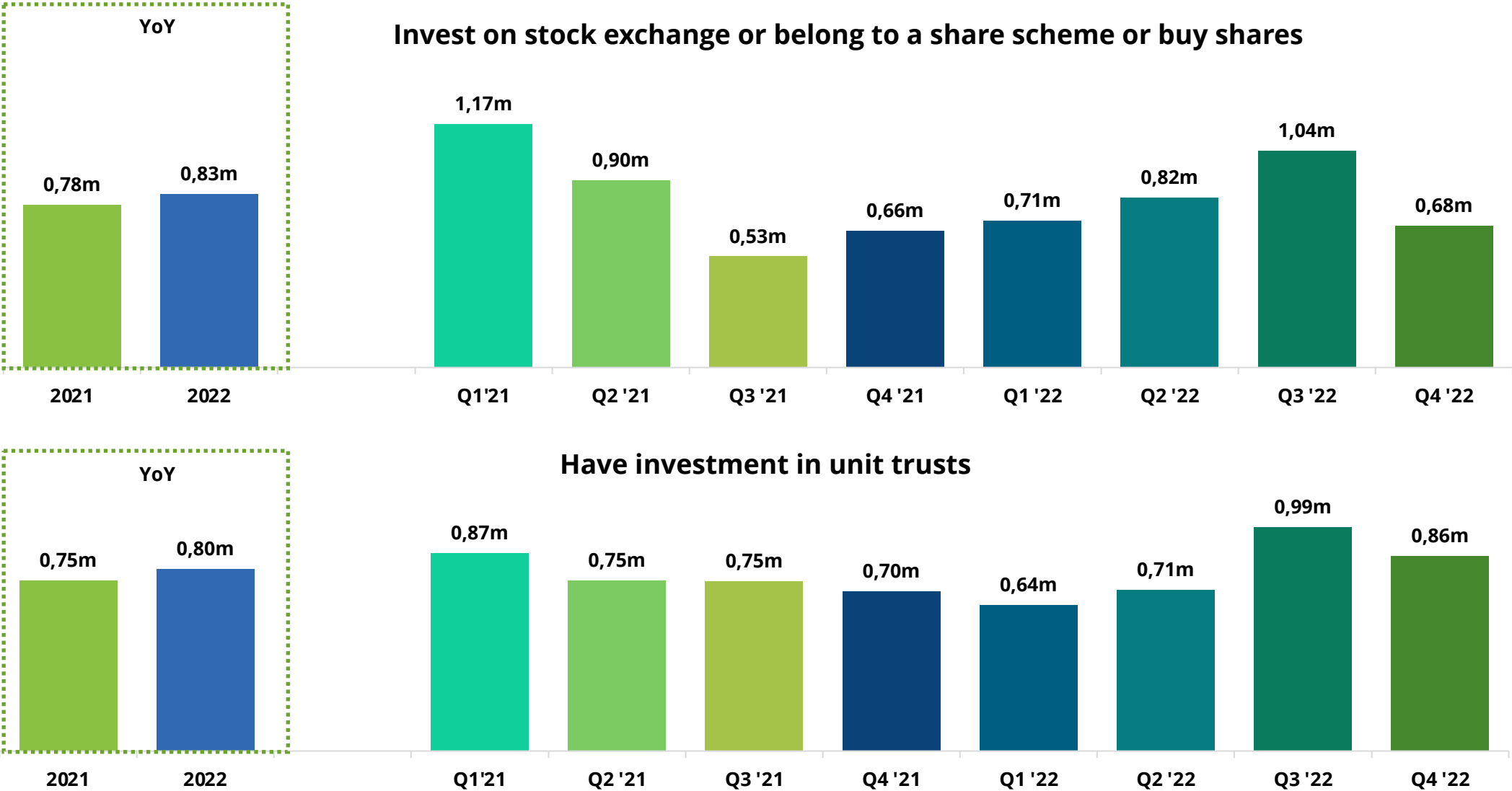
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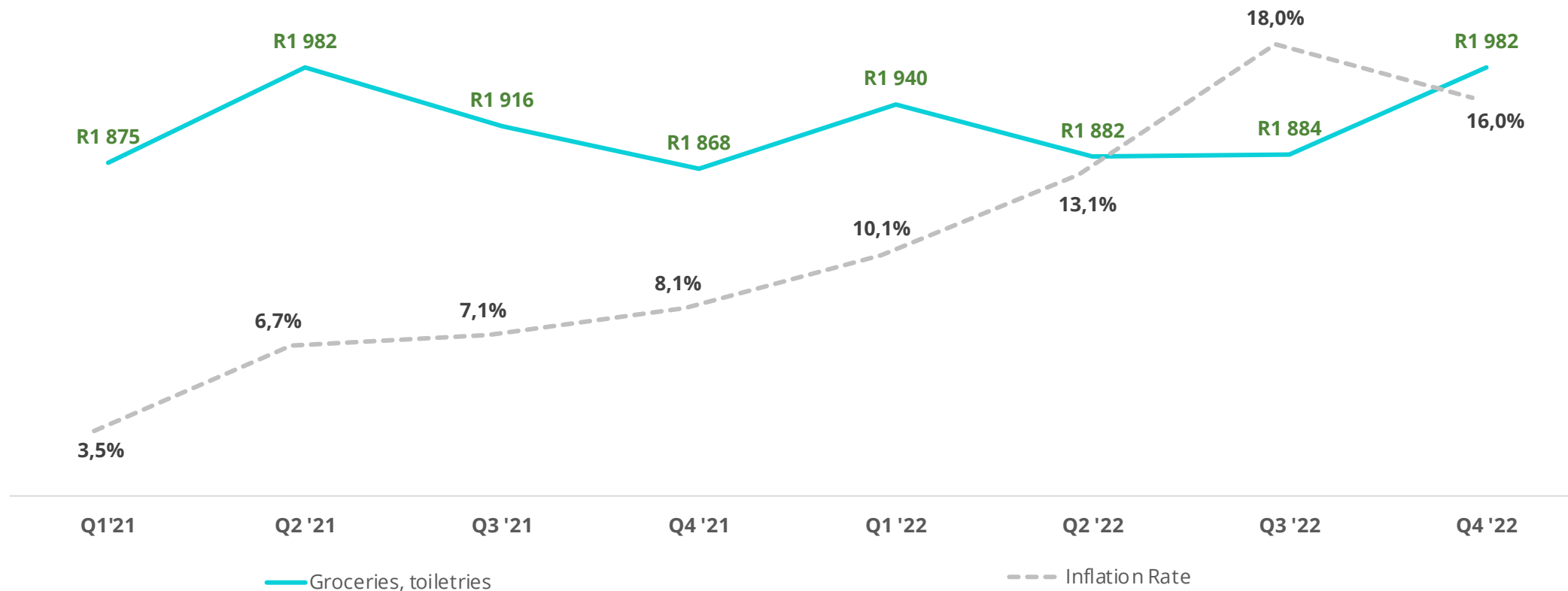
Economic Landscape - Saving



Economic Landscape - Investing



Spend – Money (Groceries/Toiletries)

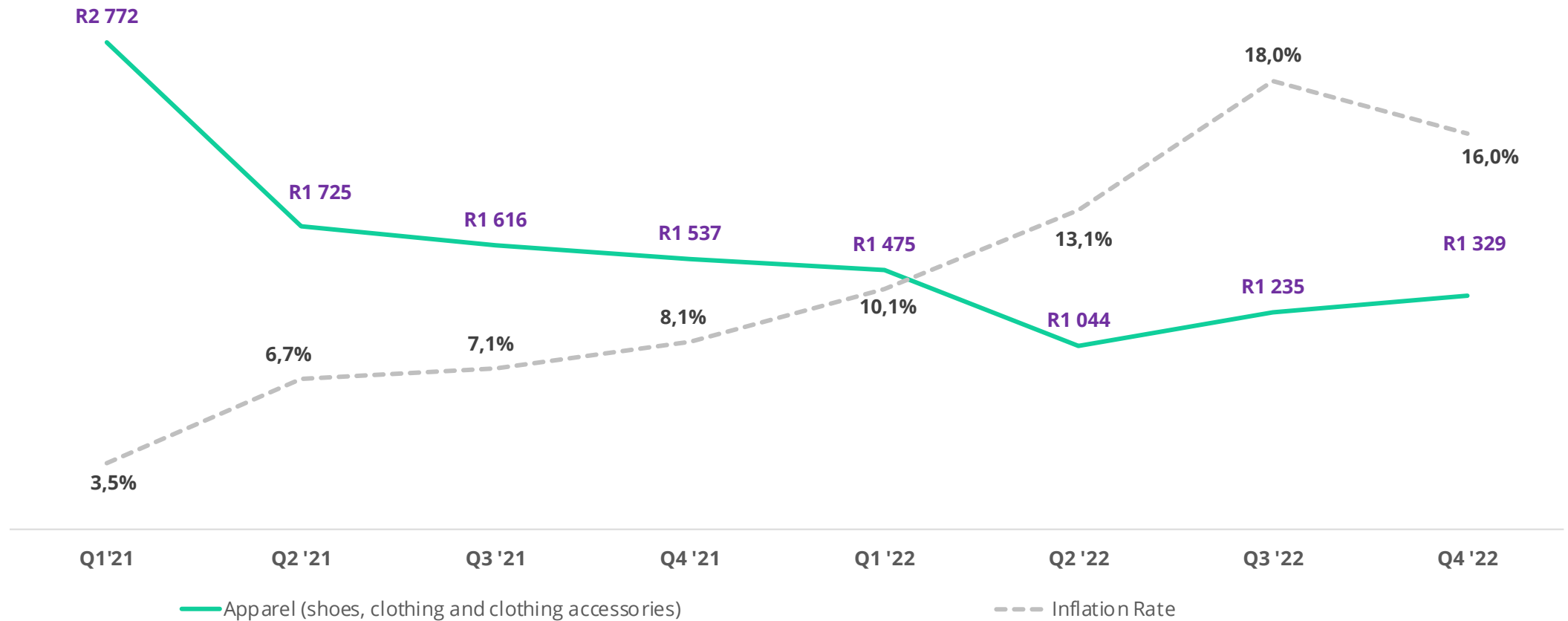


*Inflation rate figures provided by StatsSA (December 2022)

Jan'21-Dec'21 Pop 15+: 43 099 774

Jan'22- Dec'22 Pop 15+: 43 592 223

Spend – Money (Apparel)



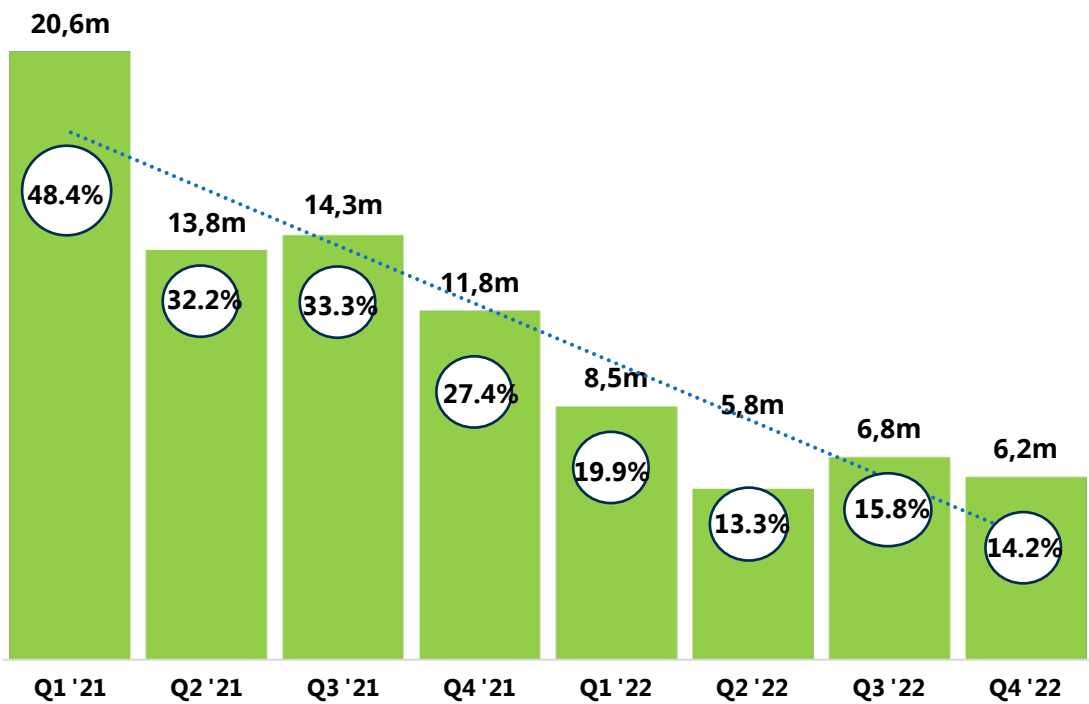
*Inflation rate figures provided by StatsSA (December 2022)

Jan'21-Dec'21 Pop 15+: 43 099 774

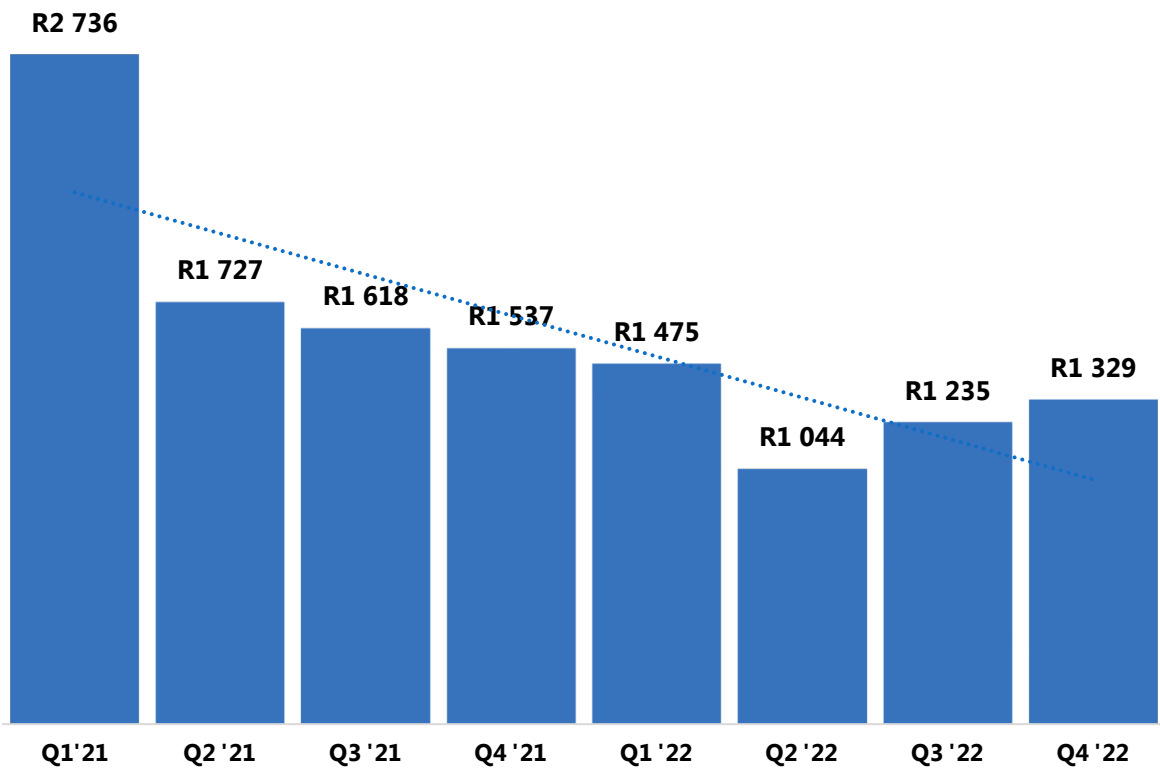
Jan'22- Dec'22 Pop 15+: 43 592 223

Clothing - Purchaser & Spend

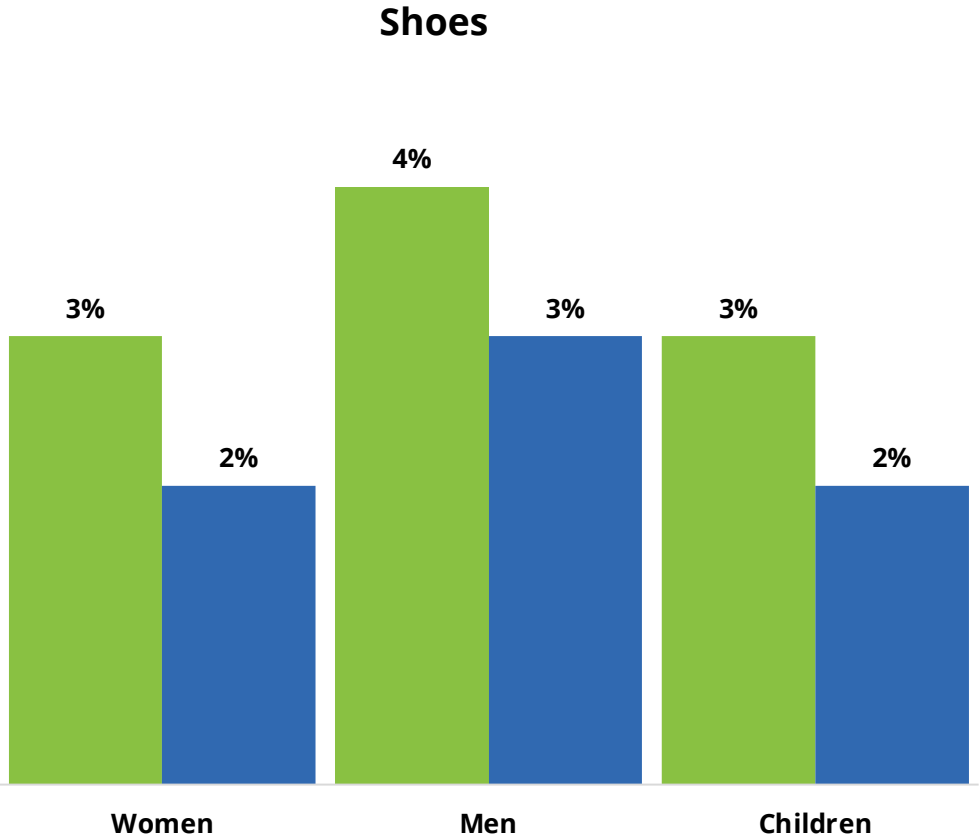
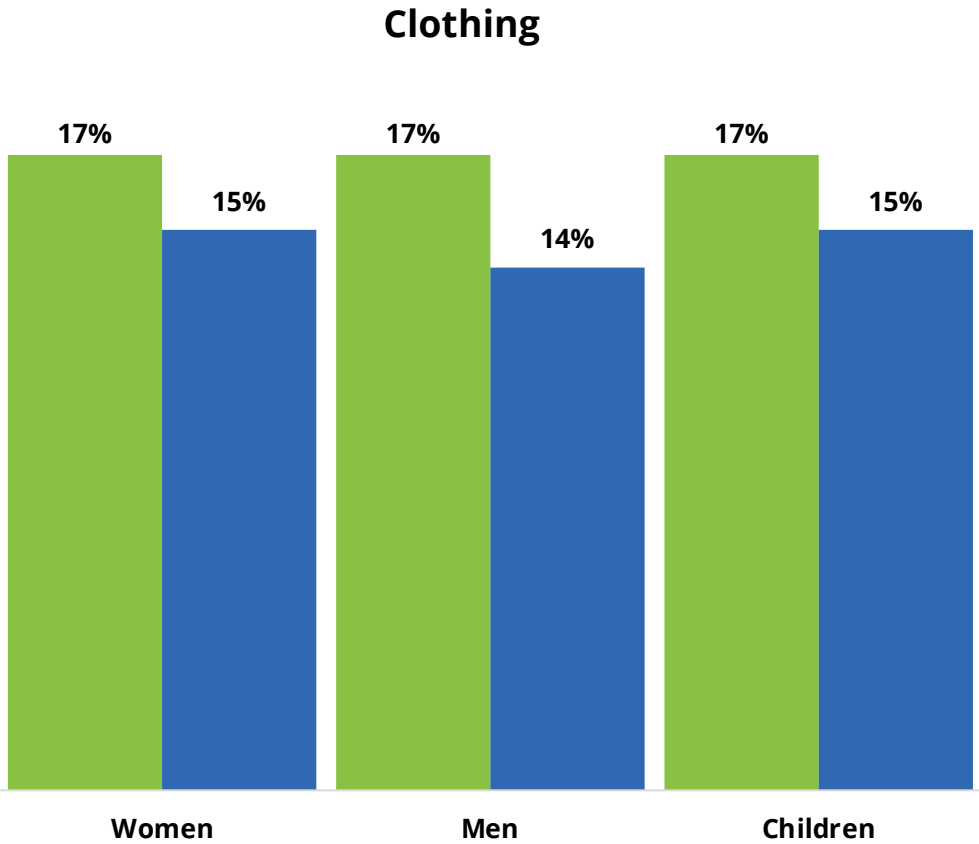
Apparel Purchaser PM



Avg Monthly Apparel Expenditure

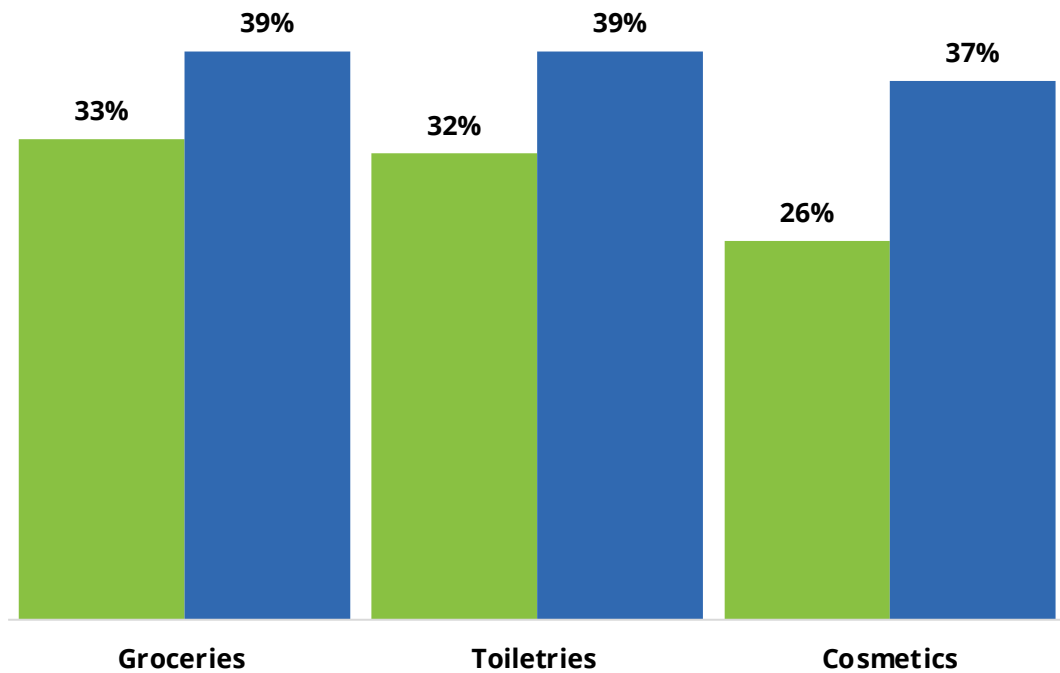


Clothing Purchases P3M - % Pop YoY

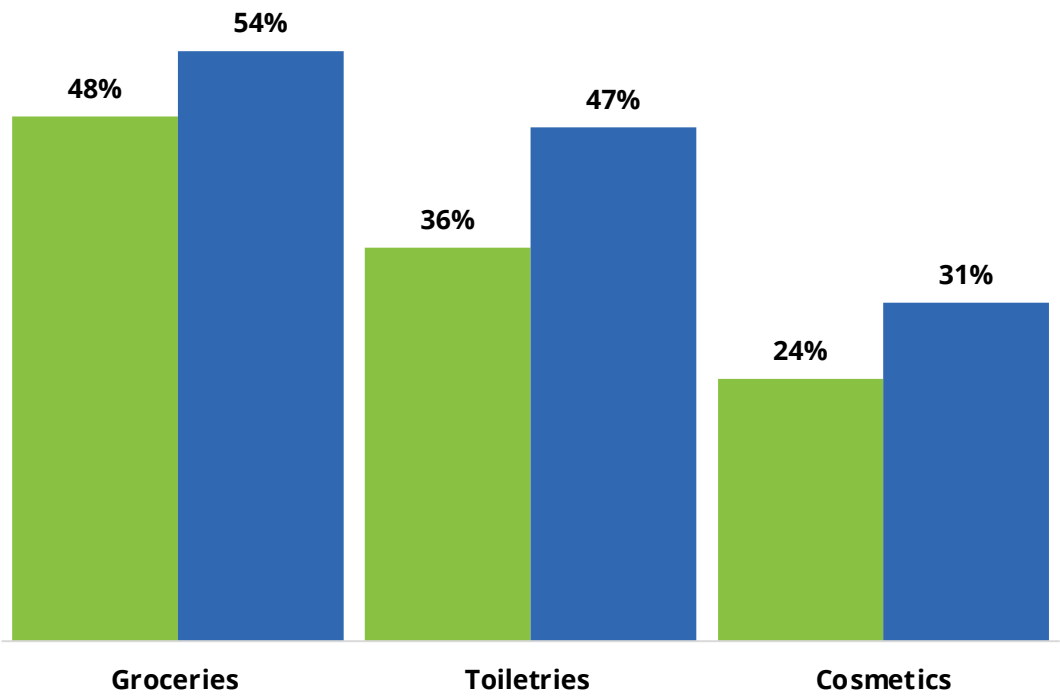


Brand Loyalty Trends - % Pop YoY

Do you always buy the same brands?



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



Media Landscape

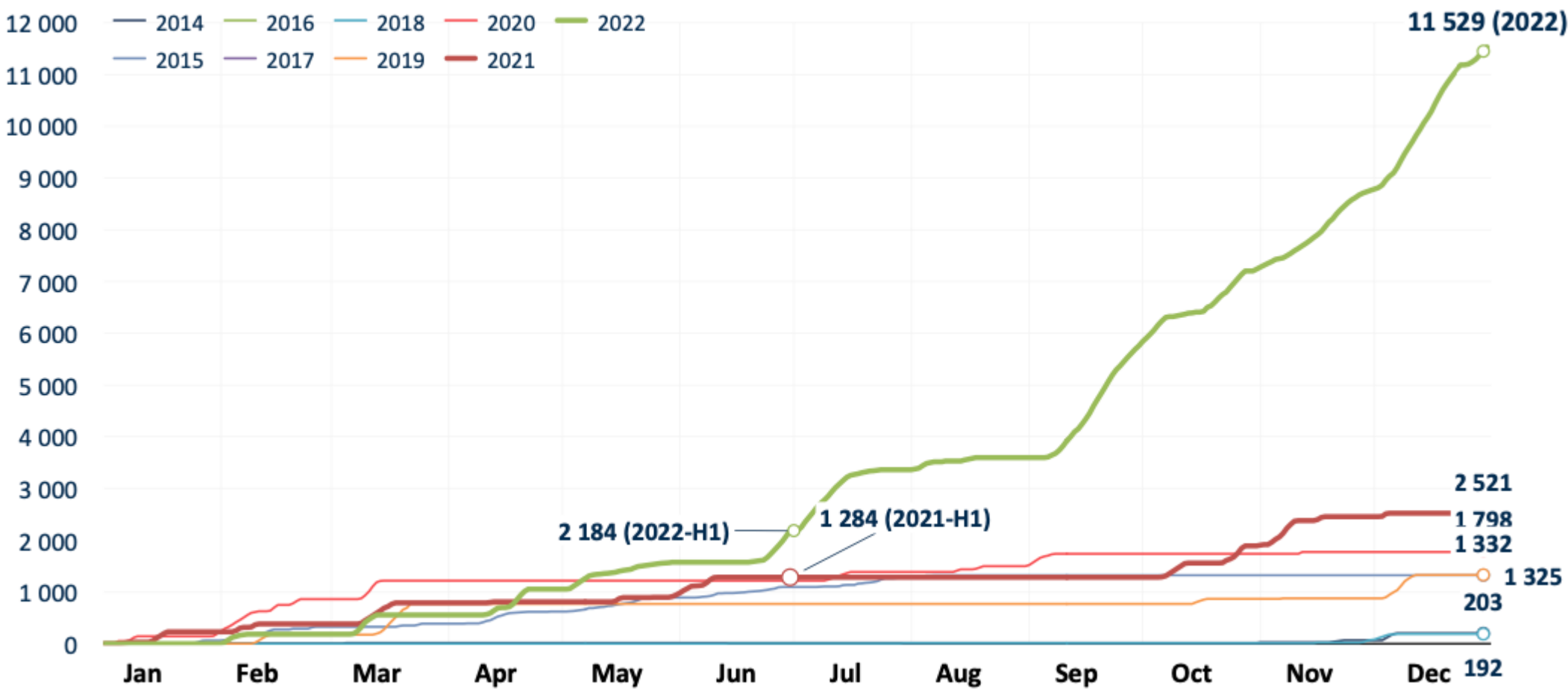


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Environment Affecting Media

Load shed, upper-limit [GWh]

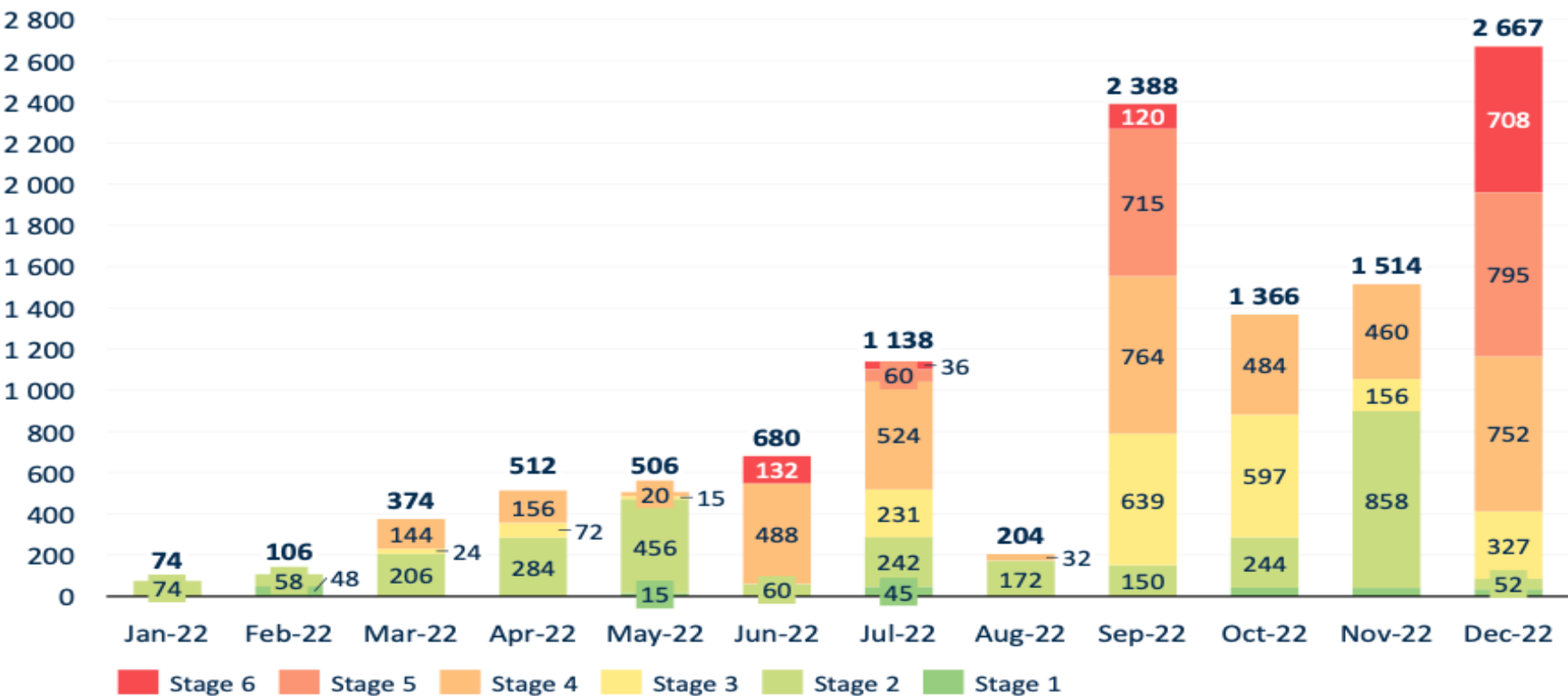


Source: CSIR Report H1* - 2023

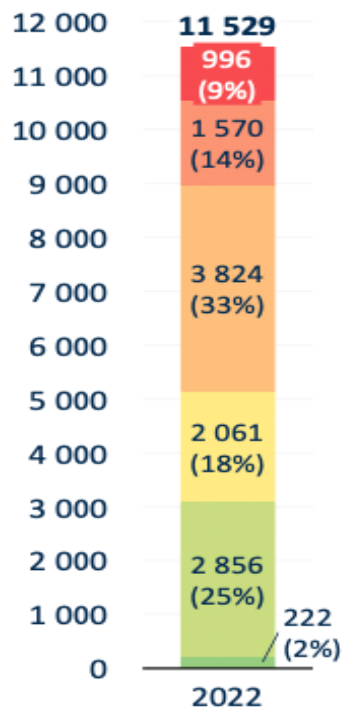
Environment Affecting Media Cont.

December 2022 was an expectionally high month in terms of loadshedding. 2022 is the first year that the majority of loadshedding has not been Stage 2, it was overtaken by Stage 4. Stage 6 loadshedding has far surpassed 2019, the only other year with Stage 6

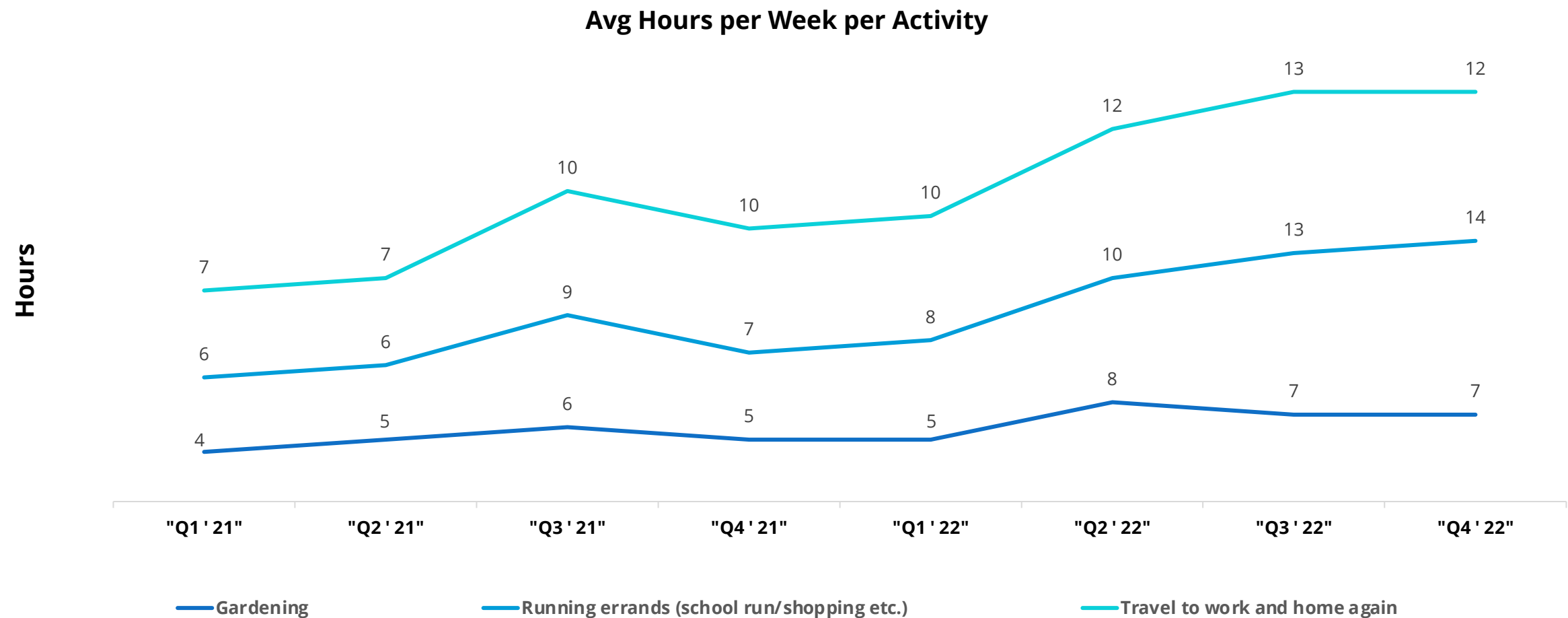
Monthly loadshedding
(upper-limit)
[GWh]



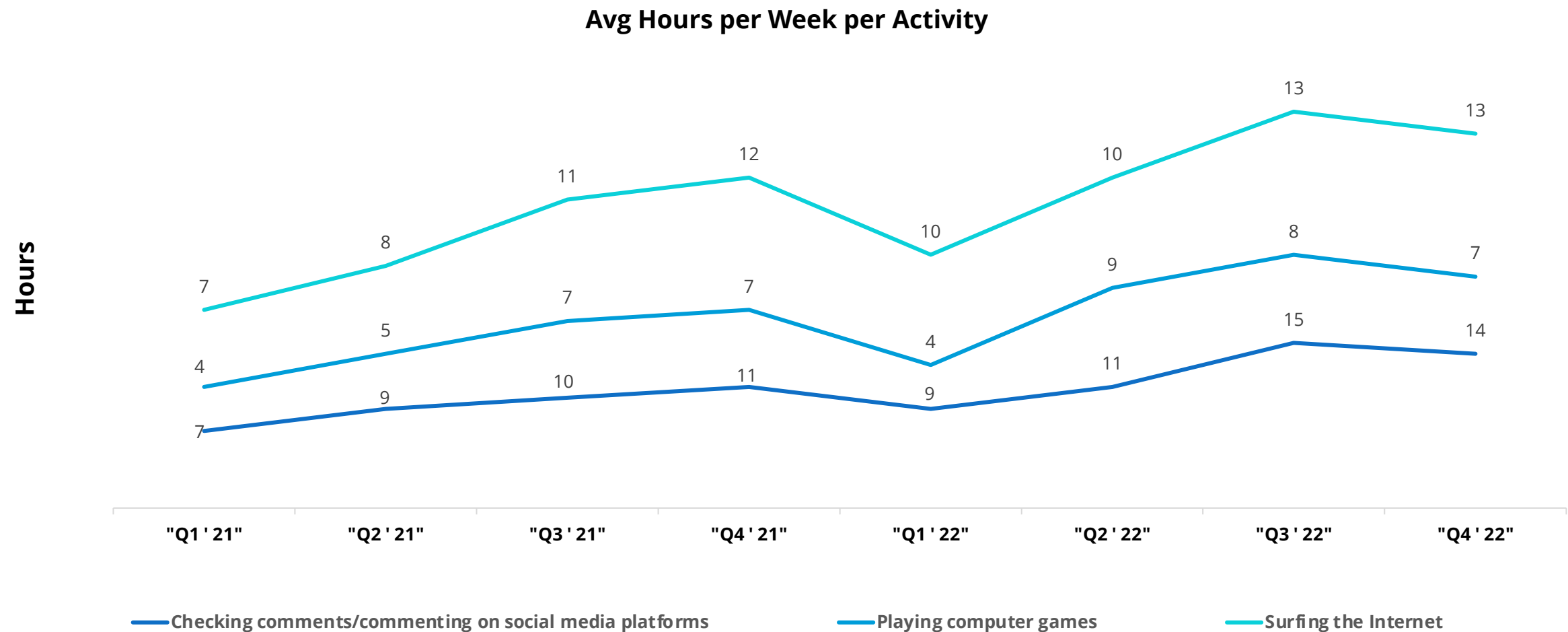
Annual loadshedding
(upper limit)
[GWh]



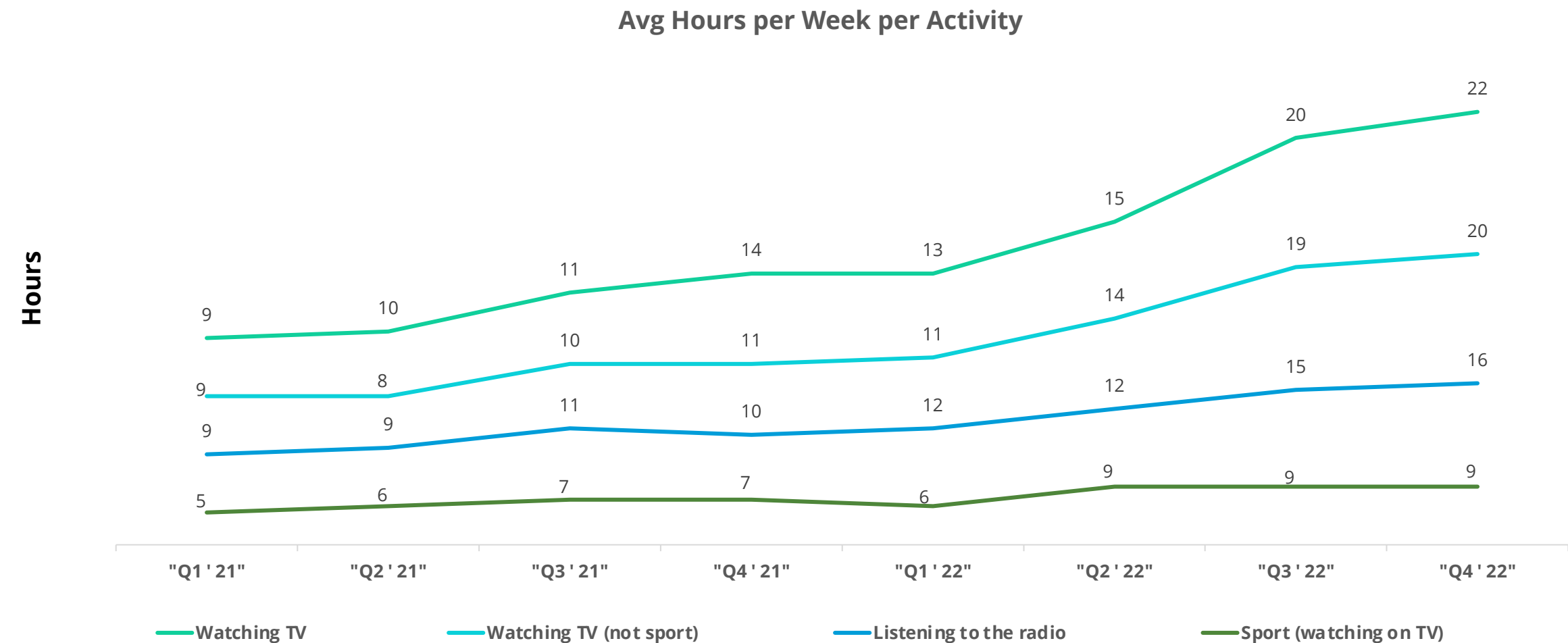
Spend – Time



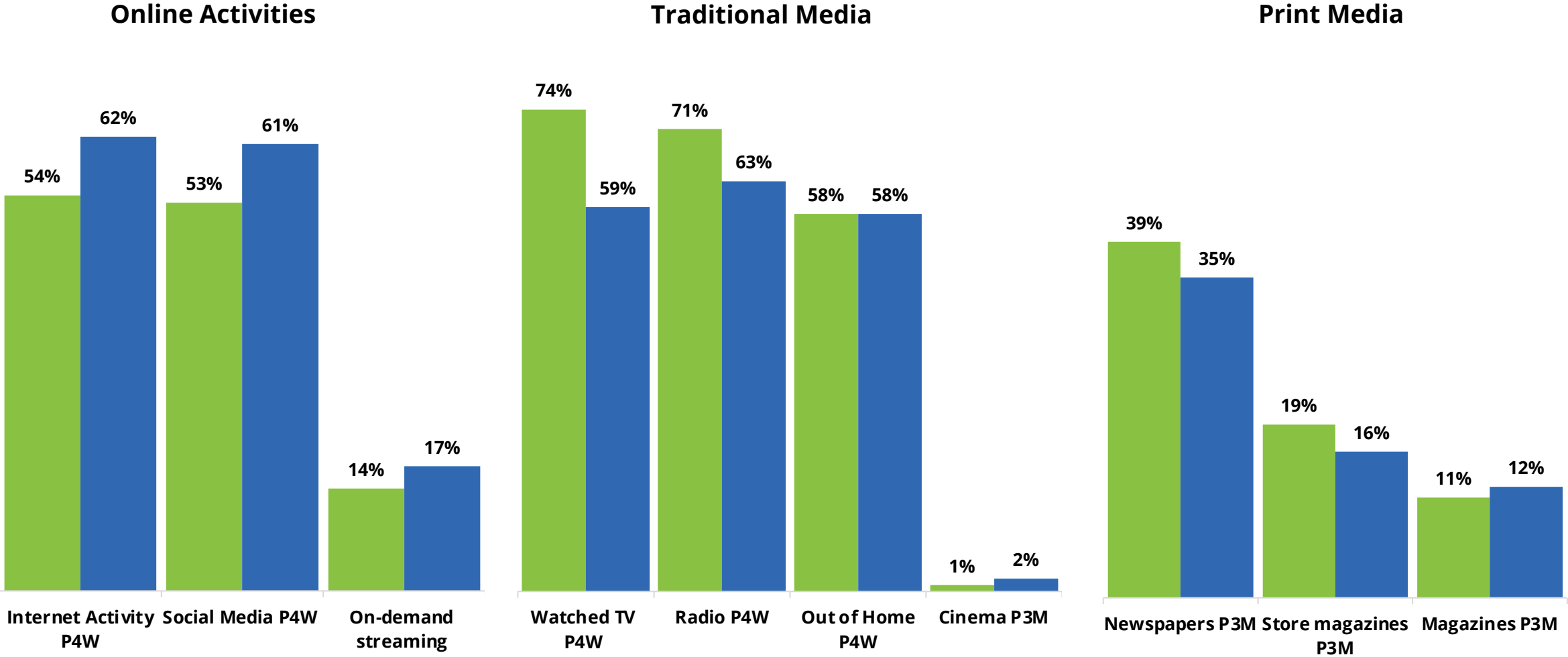
Spend – Time Cont.



Spend – Media time



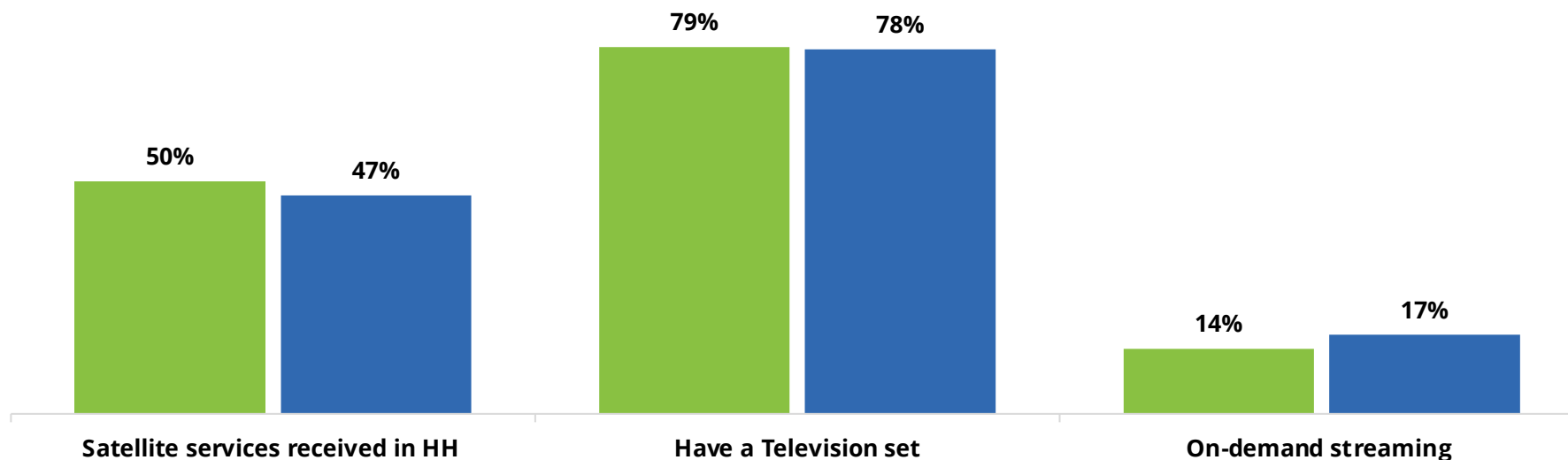
Media Penetration Shifts - % Pop YoY



Jan'21-Dec'21 Pop 15+: 43 099 774

Jan'22- Dec'22 Pop 15+: 43 592 223

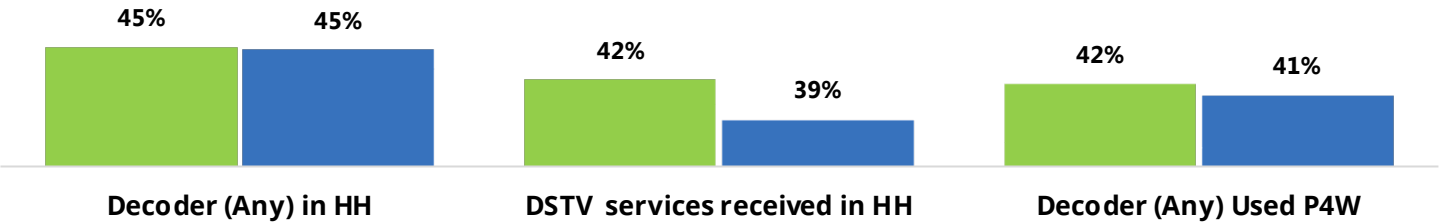
Penetration: Televisions, Satellite Services & On-demand Streaming - % Households



Universe: 17 148 000 households

TV Channels & Streaming P4W -YoY

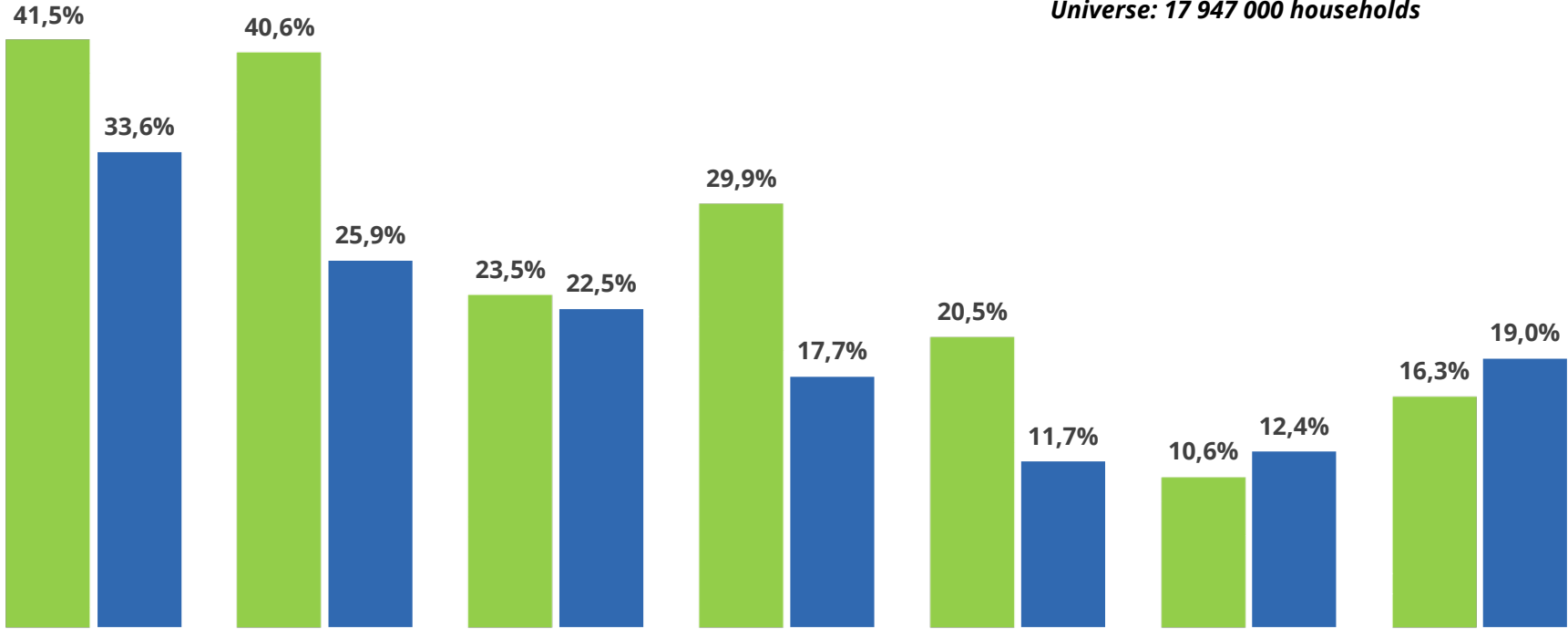
Decoder Penetration per HH



Universe: 17 947 000 households

TV (P4W)
Penetration
74%

Jan'21-Dec'21



DSTV
Channels Exclusive
to DSTV

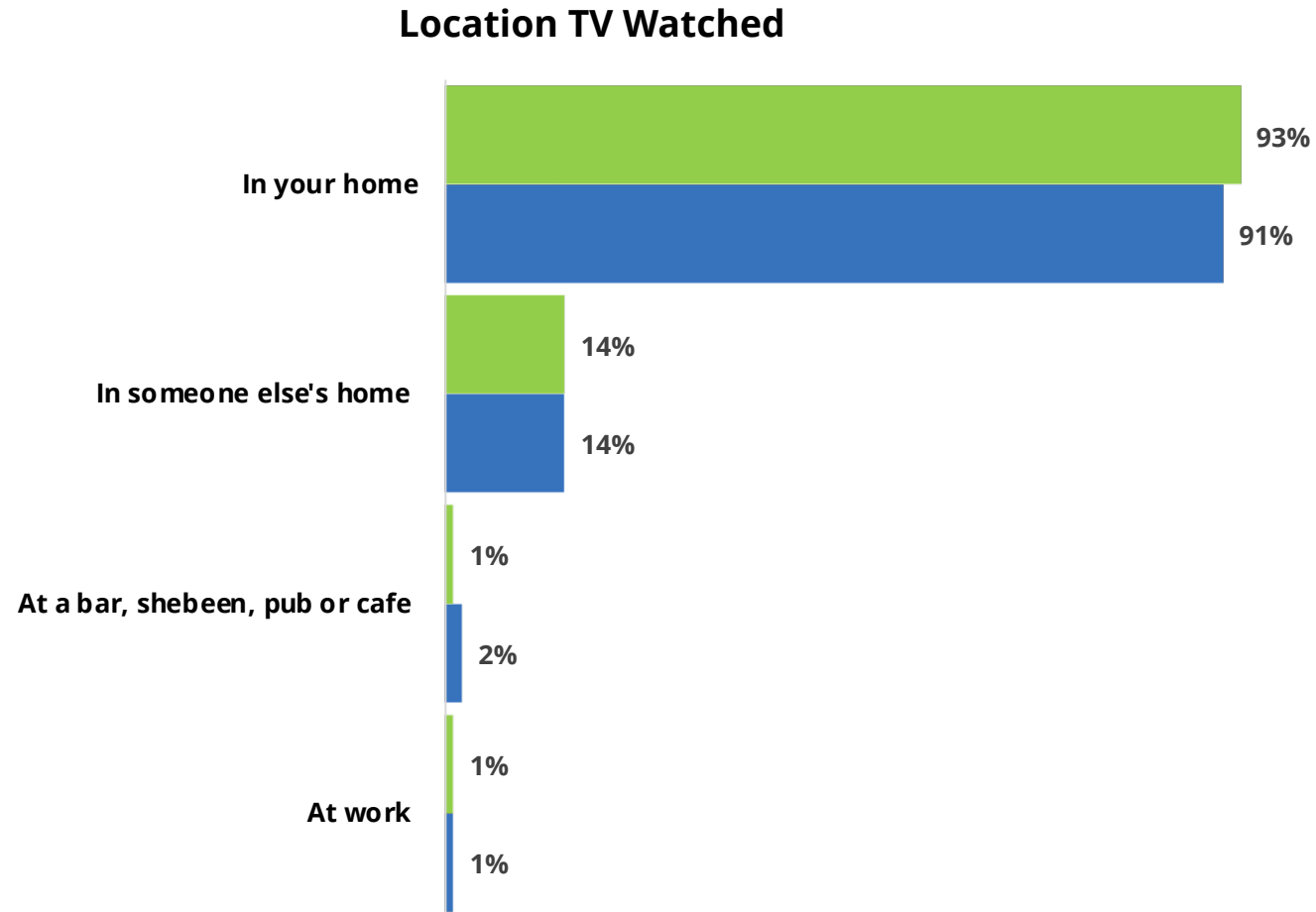
TV (P4W)
Penetration
59%

Jan'22-Dec'22

Jan'21-Dec'21 Pop 15+: 43 099 774

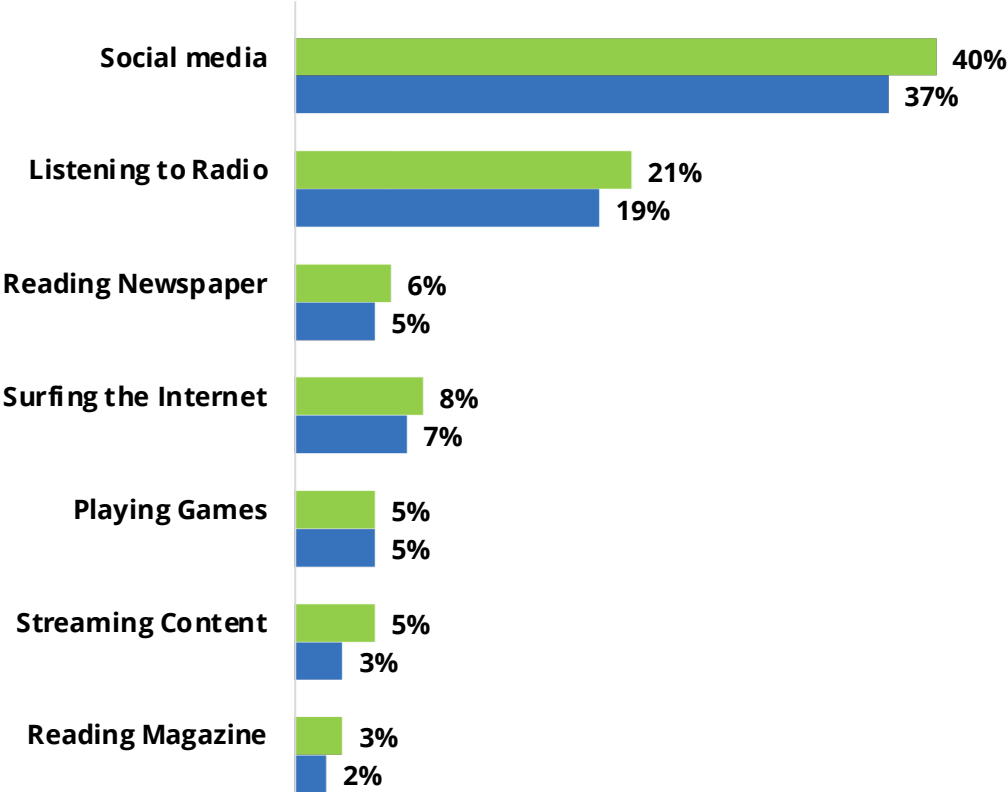
Jan'22- Dec'22 Pop 15+: 43 592 223

Locations TV consumed



Multiplatform Behaviour - % Pop YoY

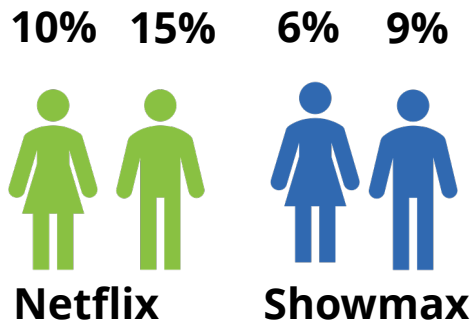
While watching live TV, which secondary activity do you engage in?



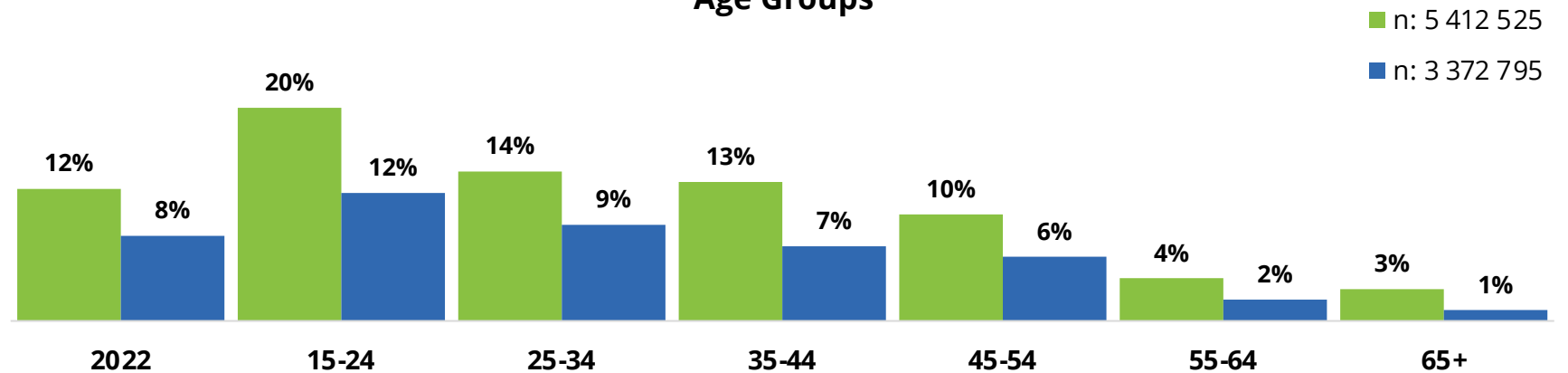
Access (Netflix vs Showmax 2022)

Netflix Showmax

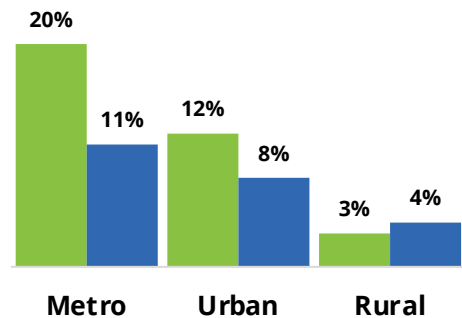
Gender



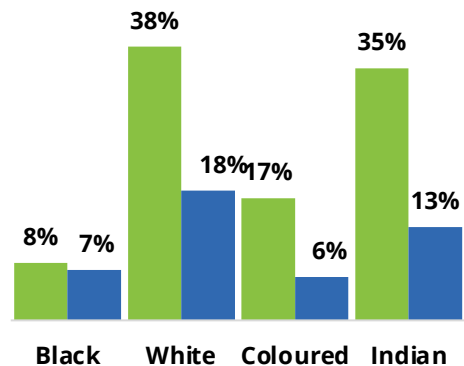
Age Groups



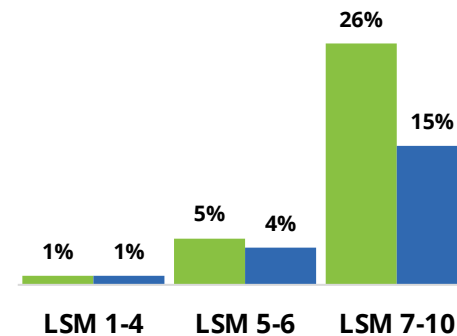
Area



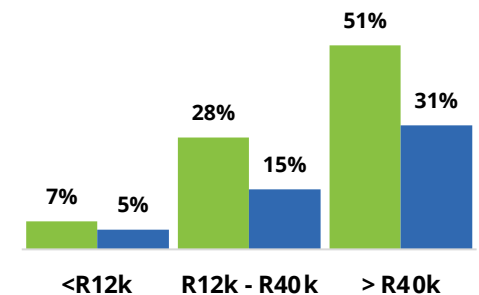
Race



LSM



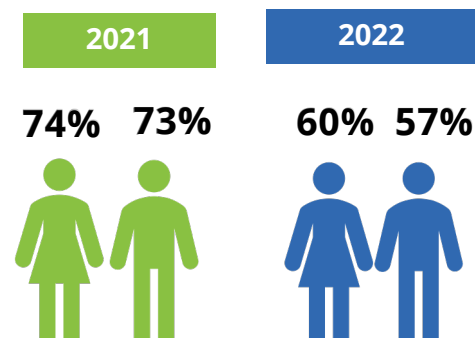
Monthly Household Income



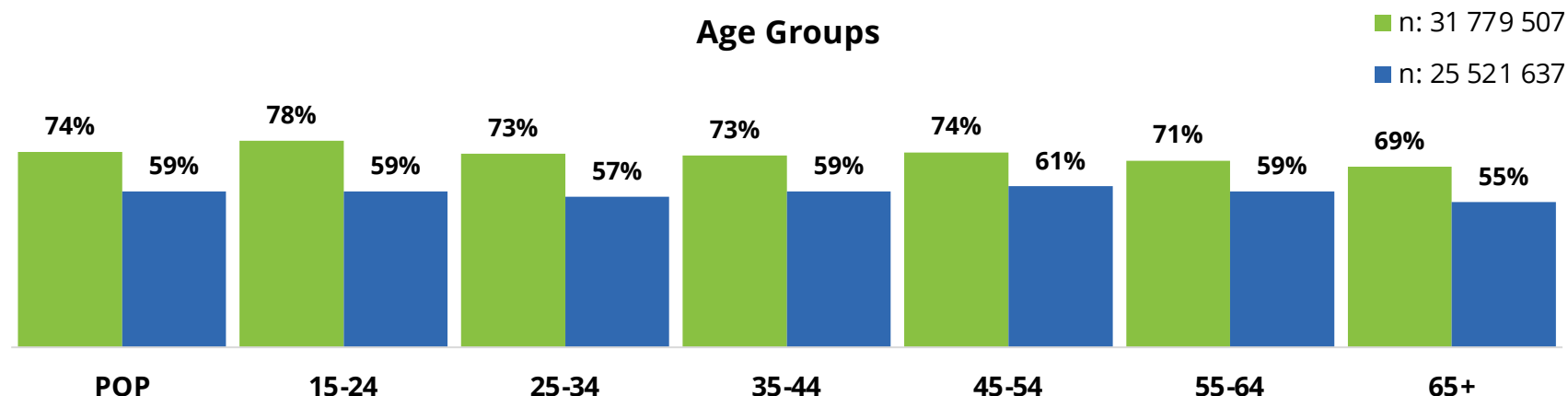
Penetration: TV P4W

Jan'21 - Dec'21 Jan'22 - Dec'22

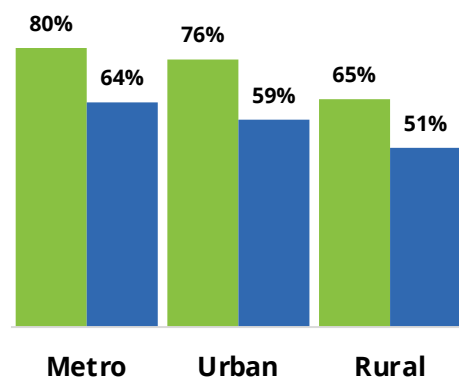
Gender



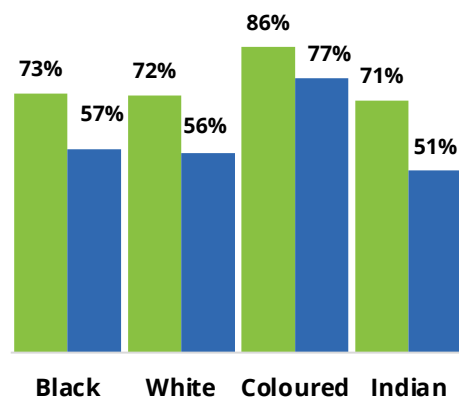
Age Groups



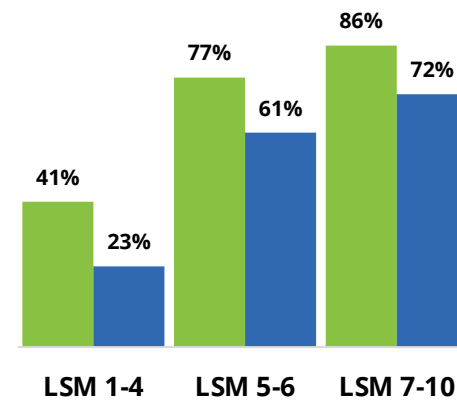
Area



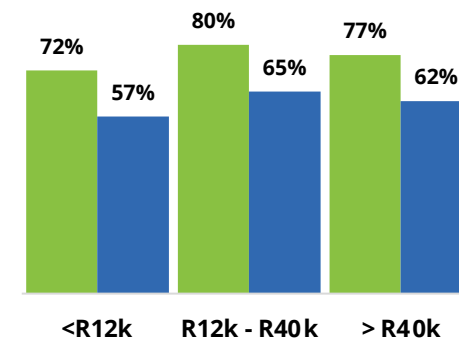
Race



LSM



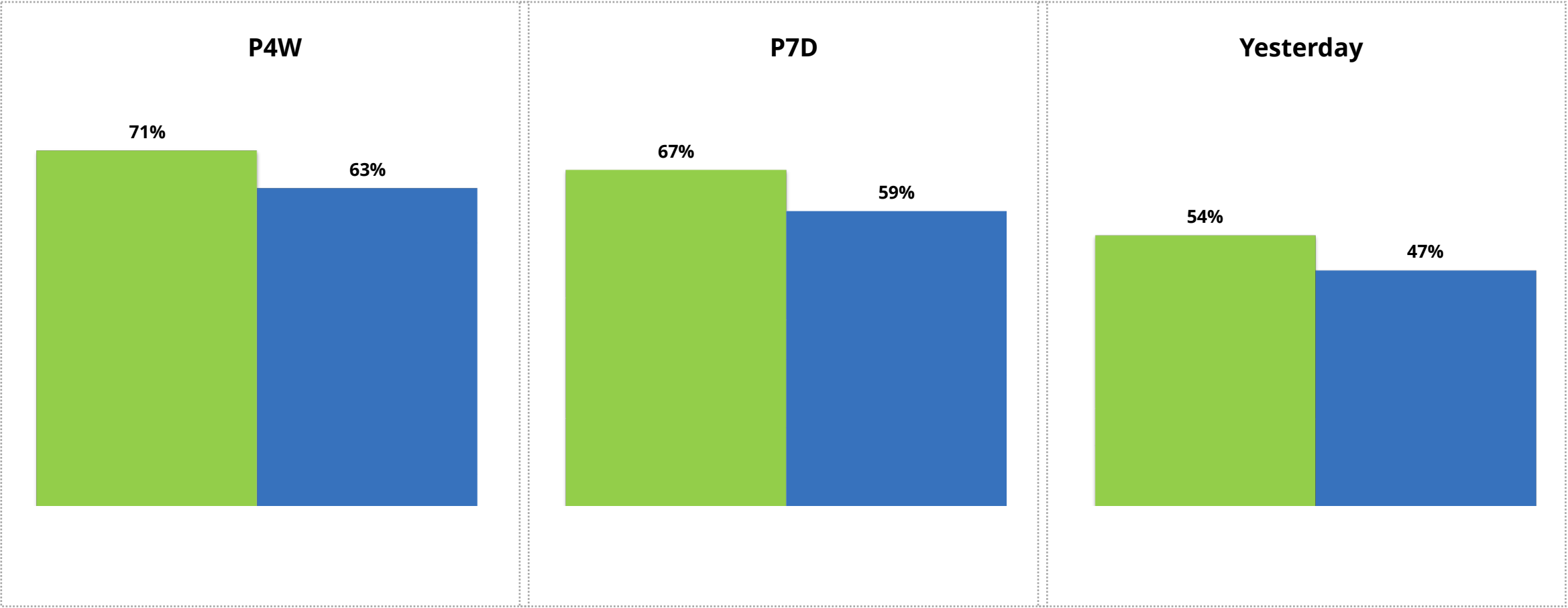
Monthly Household Income



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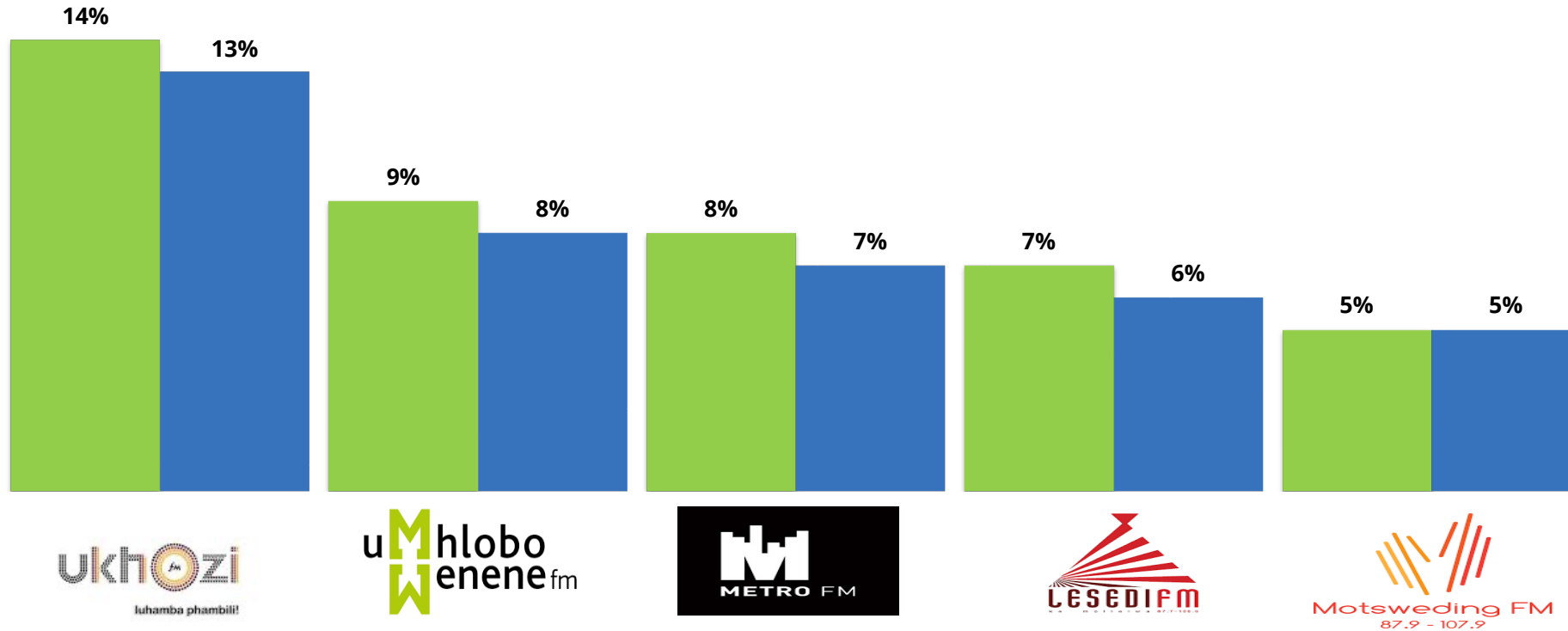
Trended Radio Listenership - % Pop YOY



Top 5 Radio Stations P4W - % Pop YOY

Radio (P4W)
Penetration
71%

Jan'21-Dec'21



Radio (P4W)
Penetration
63%

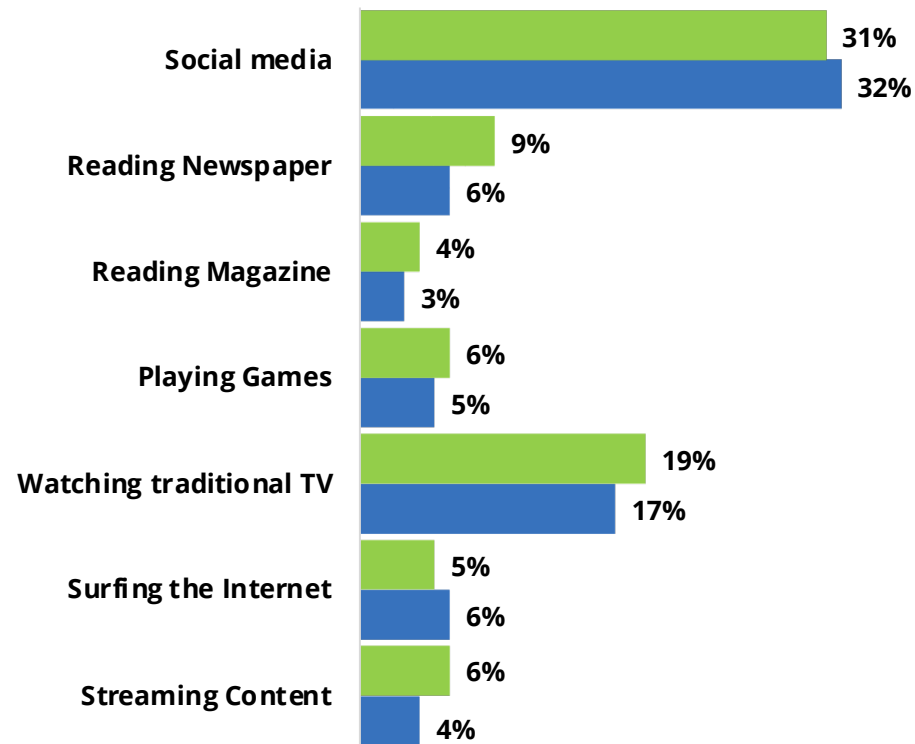
Jan'22-Dec'22

Jan'21-Dec'21 Pop 15+: 43 099 774

Jan'22- Dec'22 Pop 15+: 43 592 223

Multiplatform Behaviour - % Pop YoY

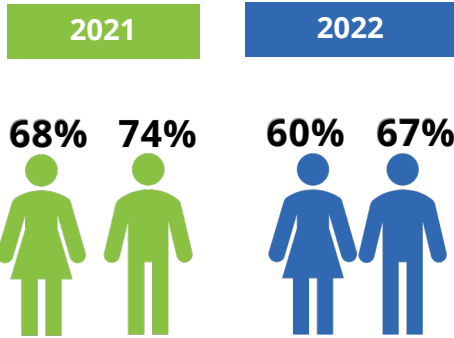
While listening to radio, which secondary activity do you engage in?



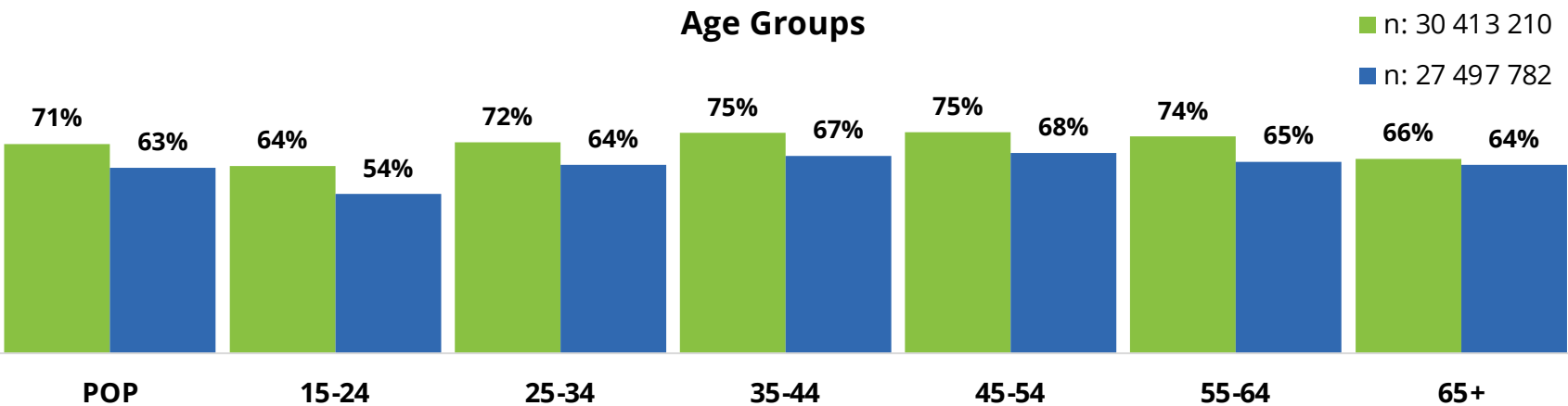
Penetration: Radio P4W

Jan'21 - Dec'21 Jan'22 - Dec'22

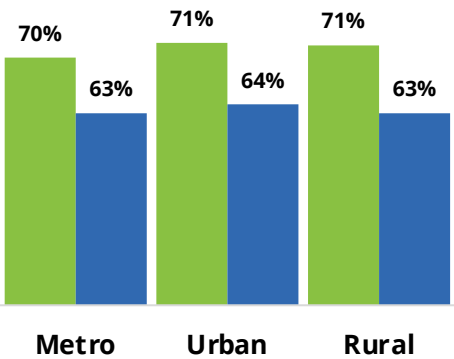
Gender



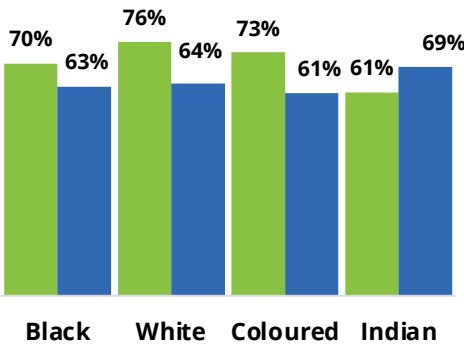
Age Groups



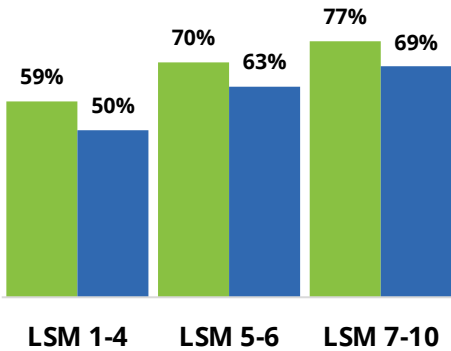
Area



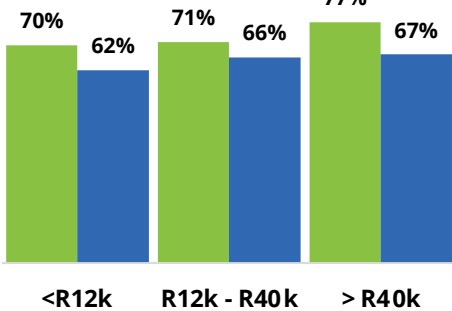
Race



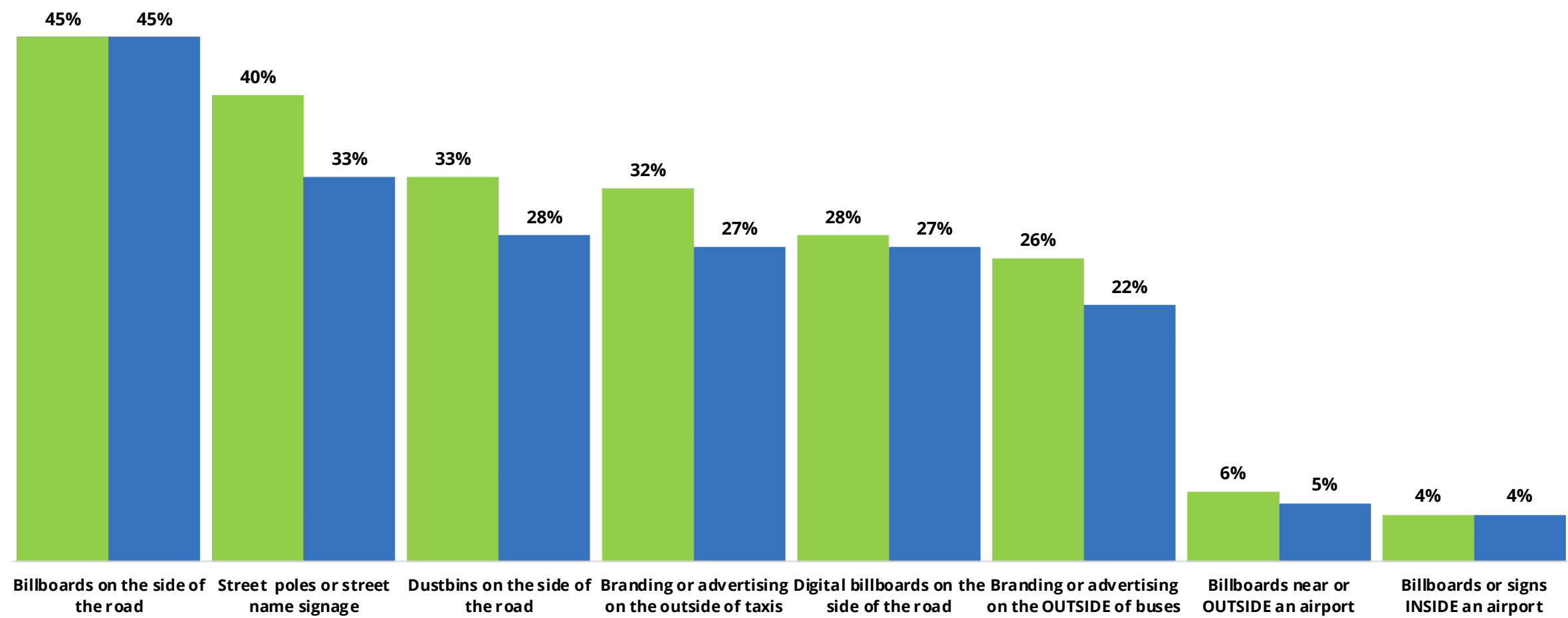
LSM



Monthly Household Income



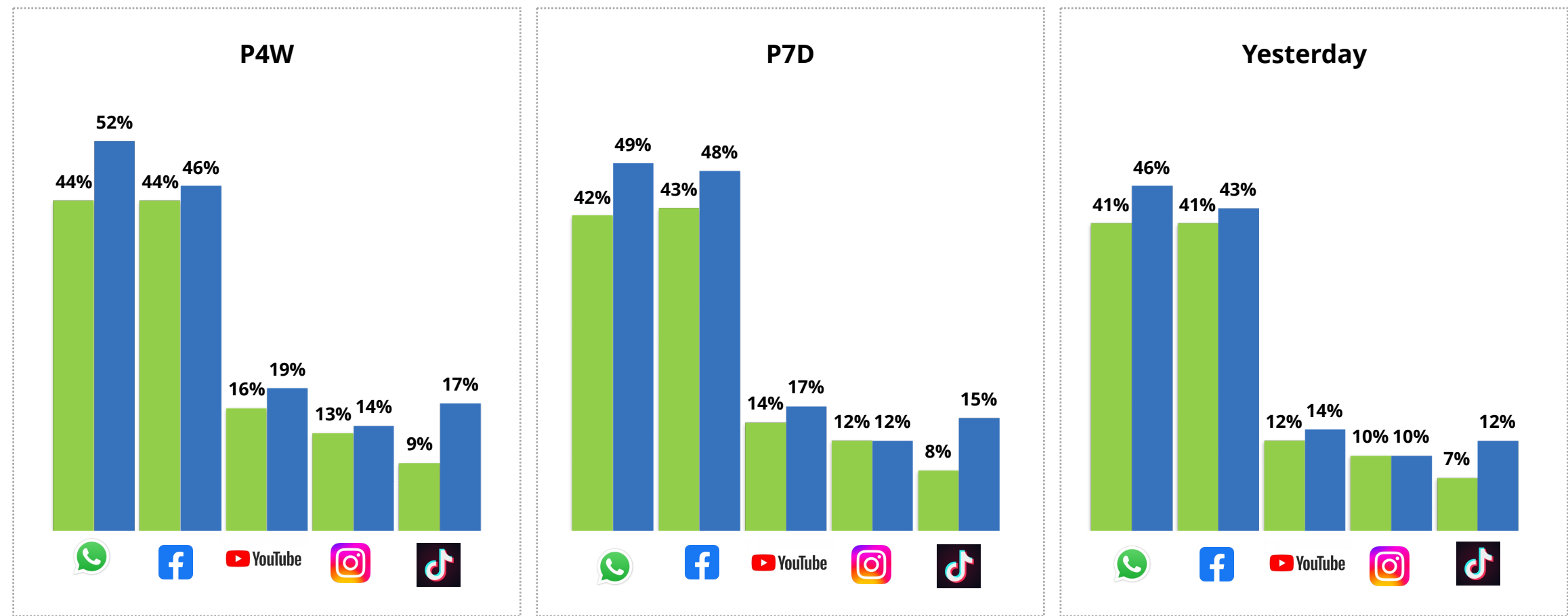
Out of Home P4W Shifts – % Pop YOY



Jan'21-Dec'21 Pop 15+: 43 099 774

Jan'22- Dec'22 Pop 15+: 43 592 223

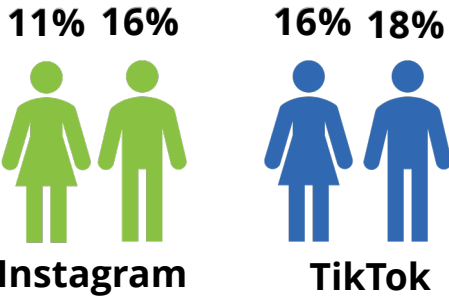
Social Media Shifts - % Pop YoY



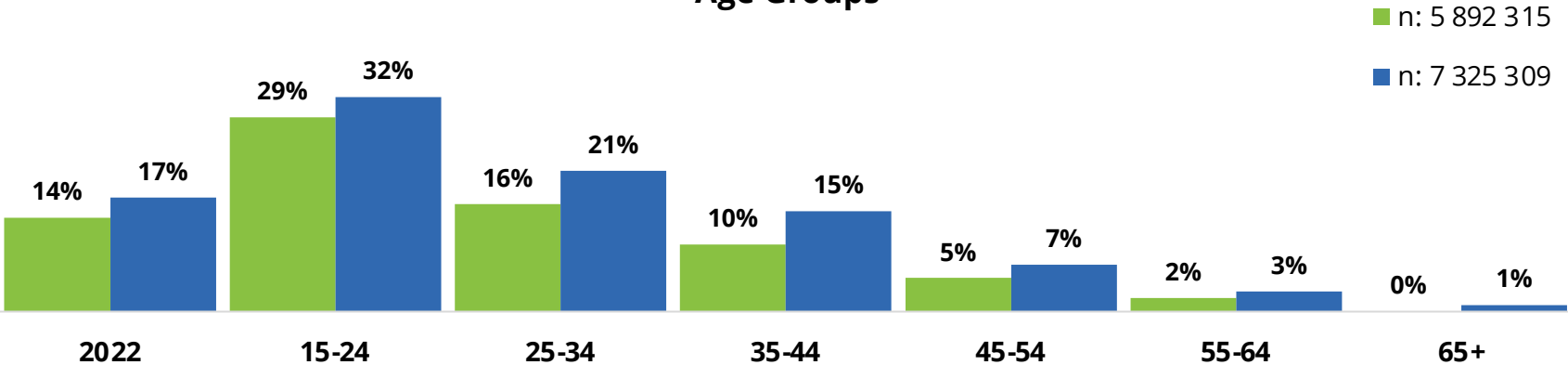
Instagram vs TikTok (2022)-P4W

Instagram TikTok

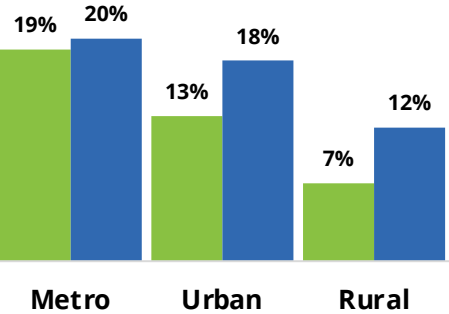
Gender



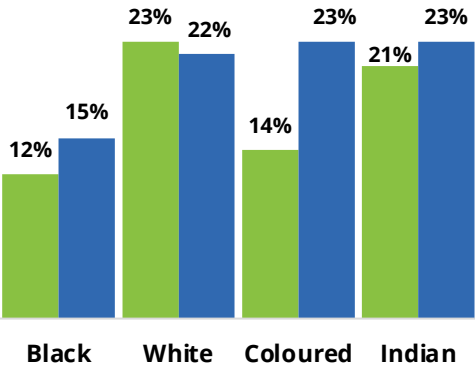
Age Groups



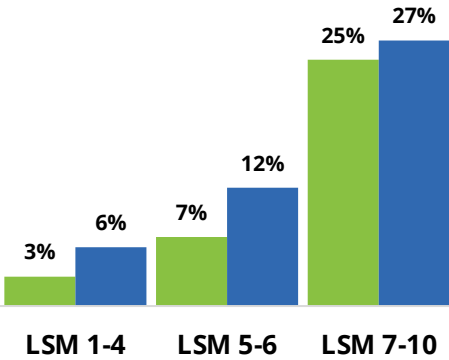
Area



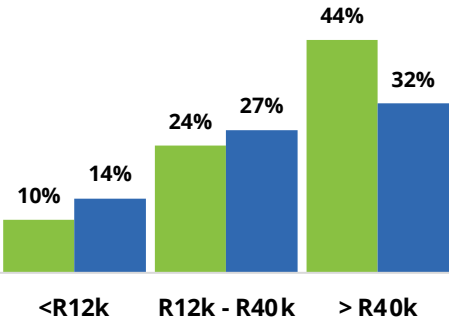
Race



LSM



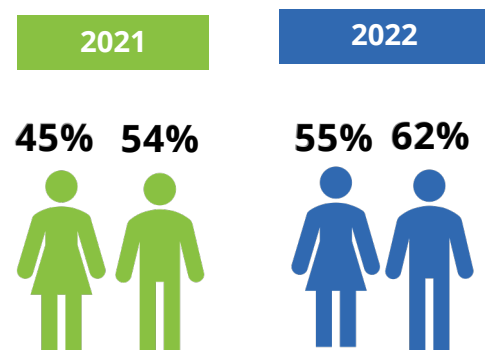
Monthly Household Income



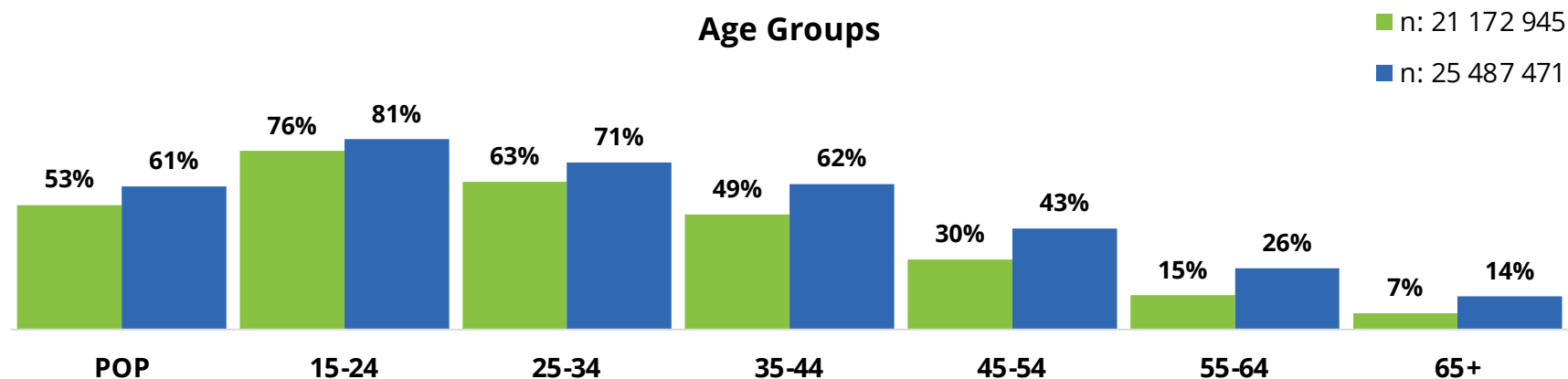
Penetration: Social Media P4W

Jan'21 - Dec'21 Jan'22 - Dec'22

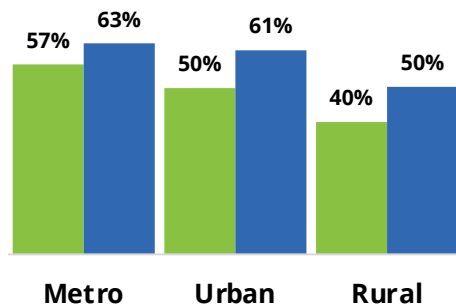
Gender



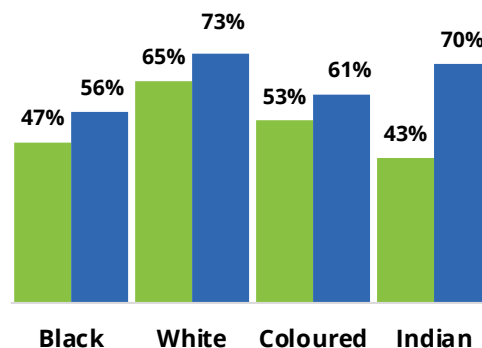
Age Groups



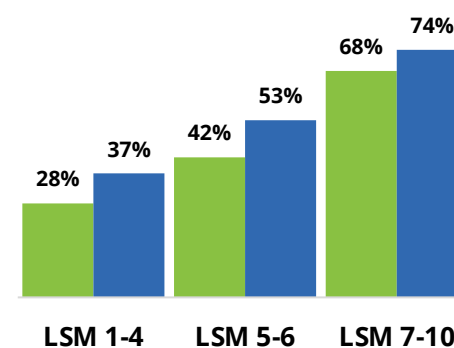
Area



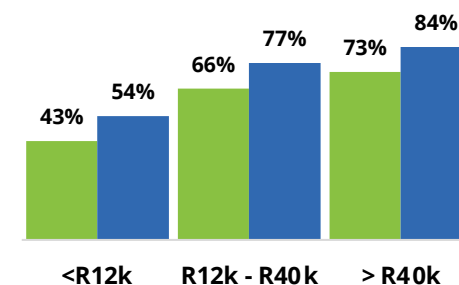
Race



LSM



Monthly Household Income



Jan'21-Dec'21 Pop 15+: 43 099 774

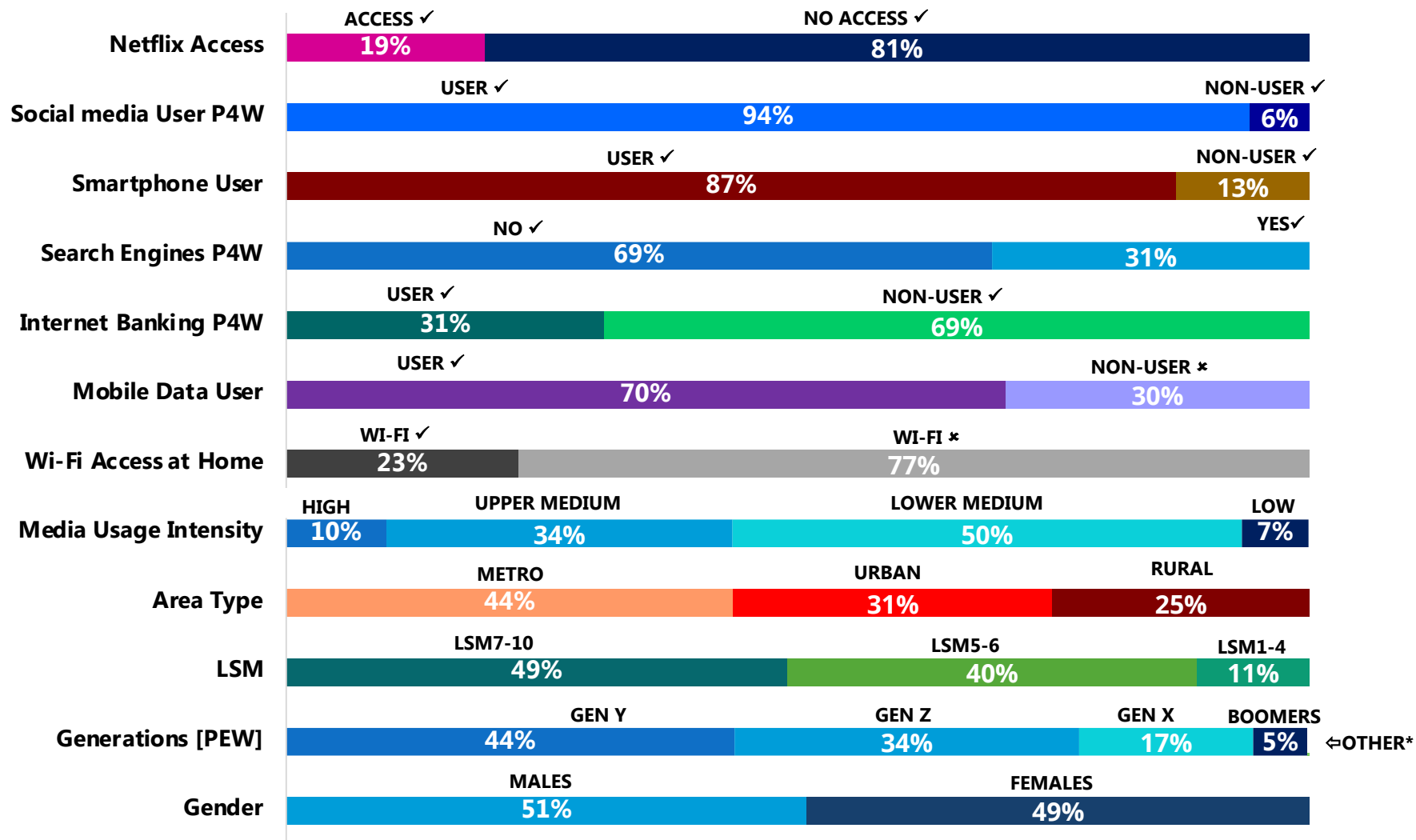
Jan'22- Dec'22 Pop 15+: 43 592 223

Active Internet users [P4W]: Advertising Audience Profile

n=26 987 262

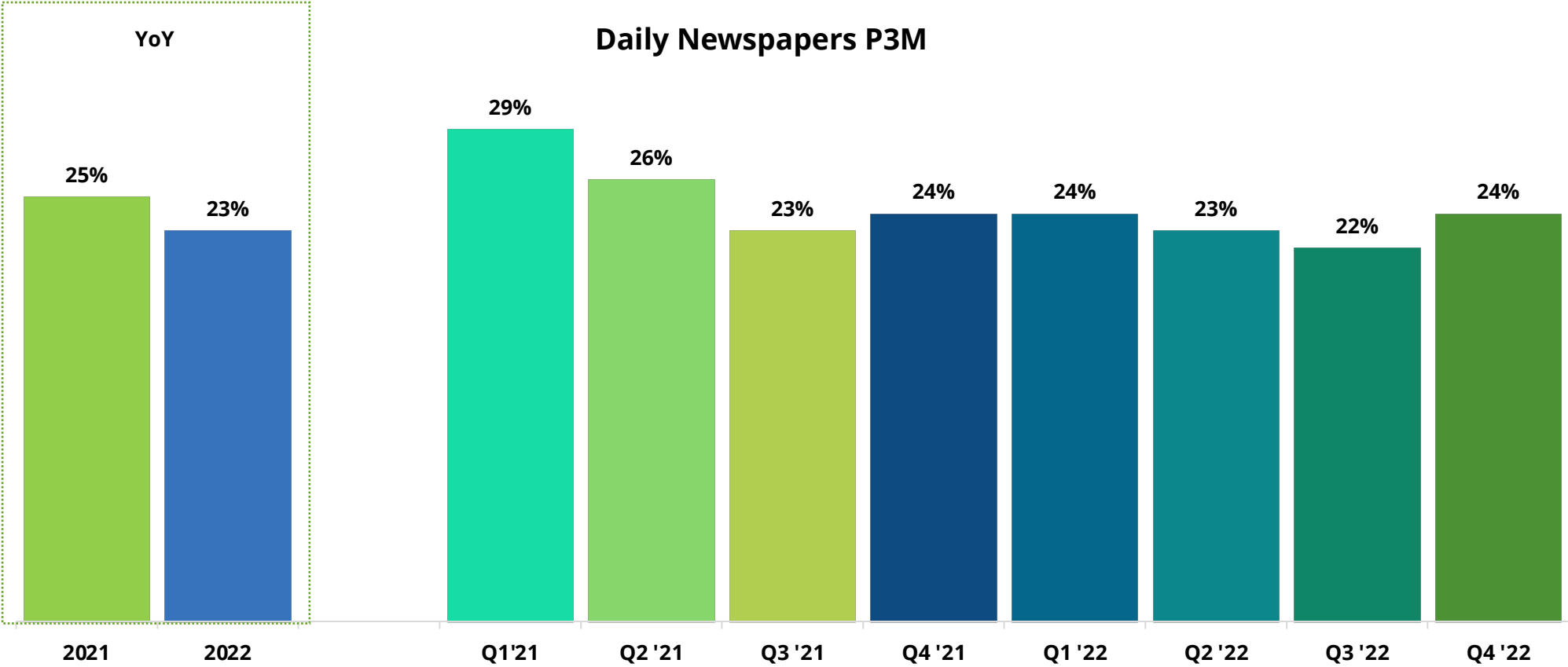
Internet
(P4W)
Penetration
62%

Smartphone
(P4W)
Users [15+]
68%

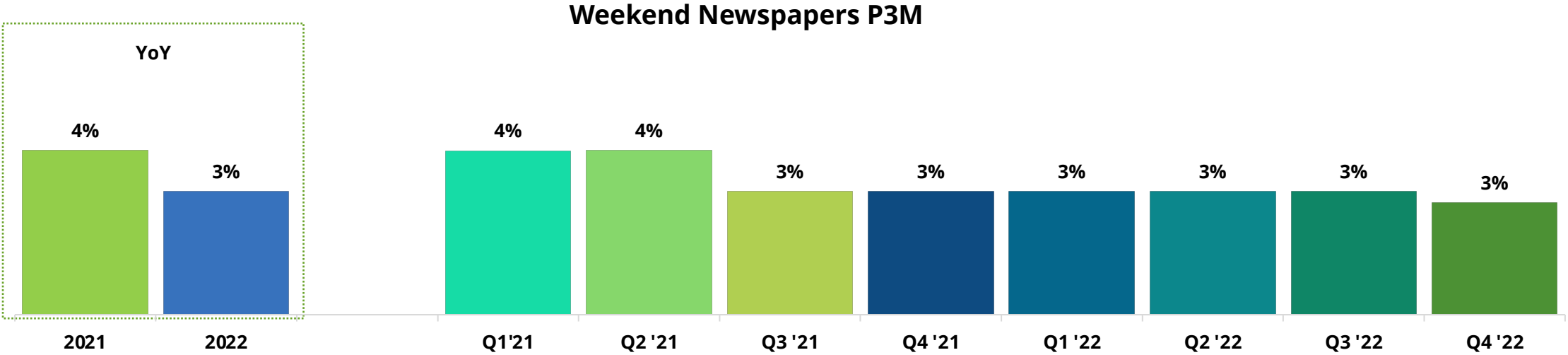
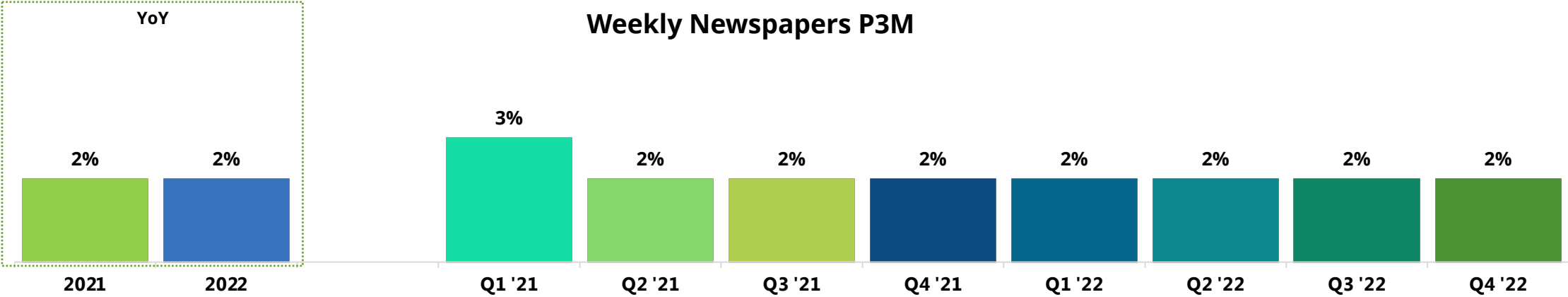


OTHER* - PRE-BOOMERS – 0.2%

Newspaper Readership Trends (Both Paper and Online) - % Pop



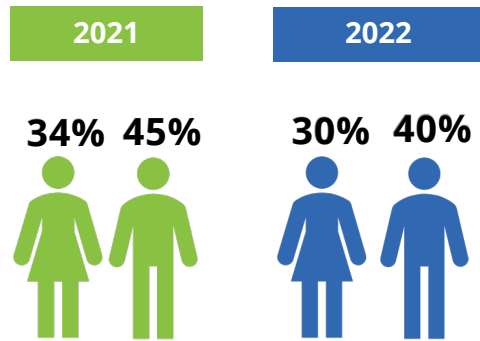
Newspaper Readership Trends (Both Paper and Online) - % Pop Cont.



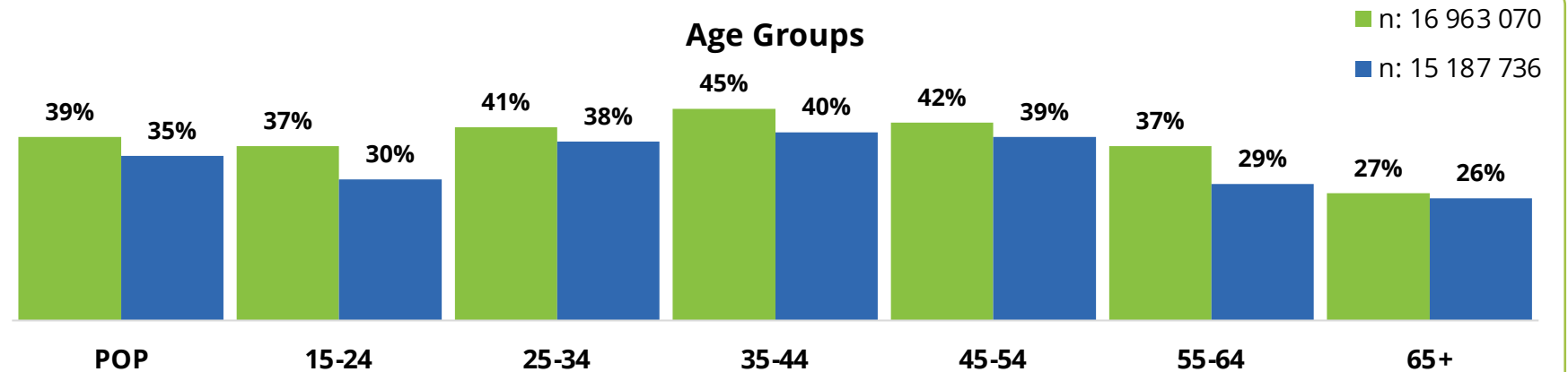
Newspaper – Penetration P3M

Jan'21 - Dec'21 Jan'22 - Dec'22

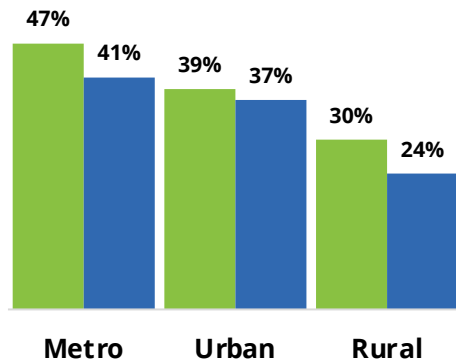
Gender



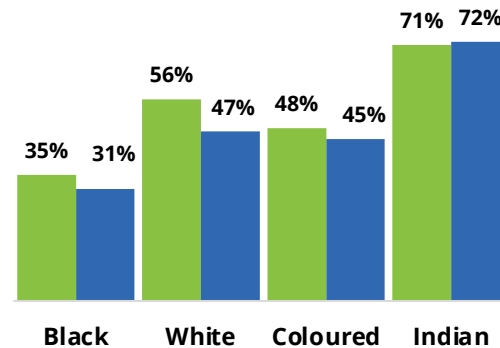
Age Groups



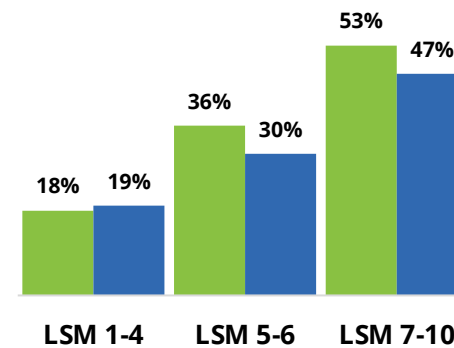
Area



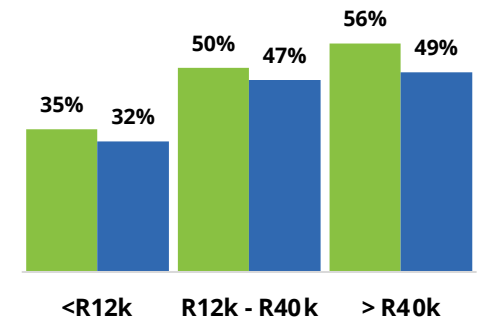
Race



LSM



Monthly Household Income

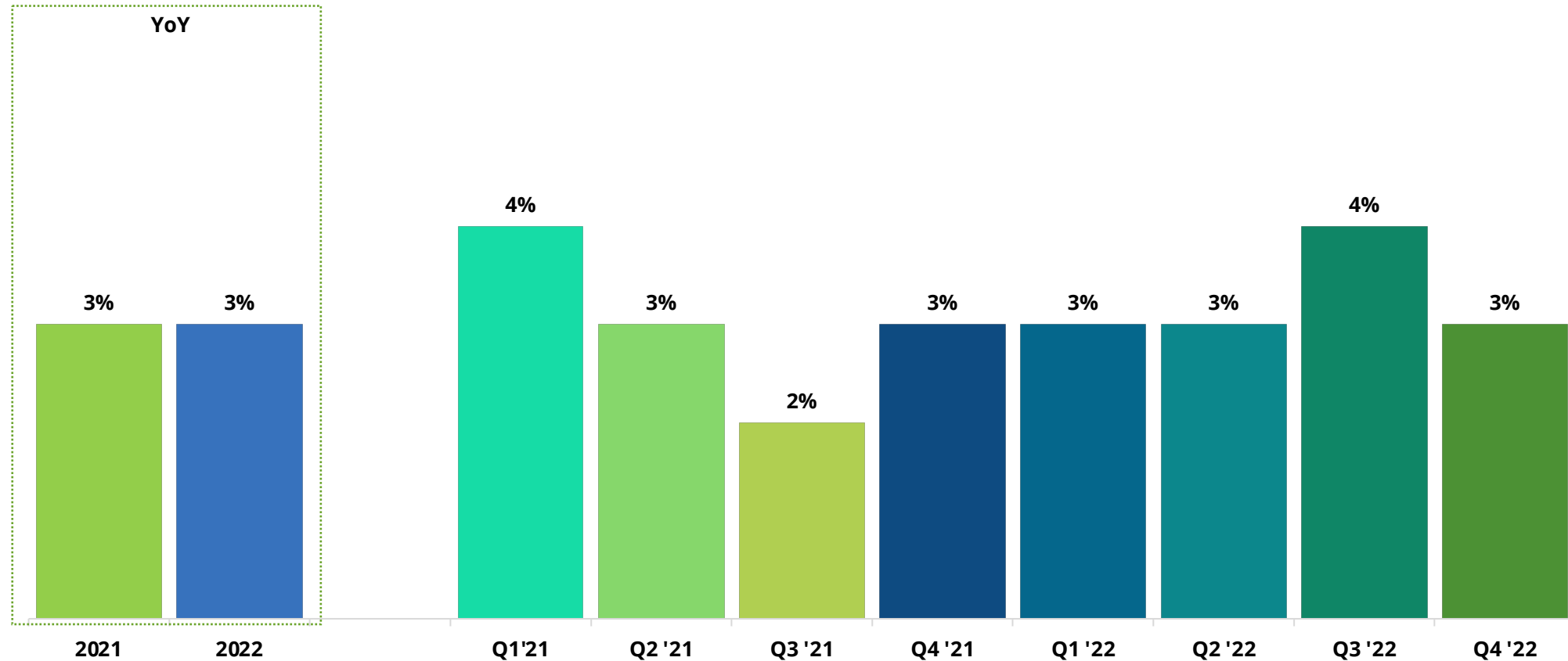


Jan '21-Dec '21 Pop 15+: 43 099 774

Jan '22-Dec '22 Pop 15+: 43 592 223

Magazine Readership Trends (Both Paper and Online) - % Pop

Weekly Magazines P3M



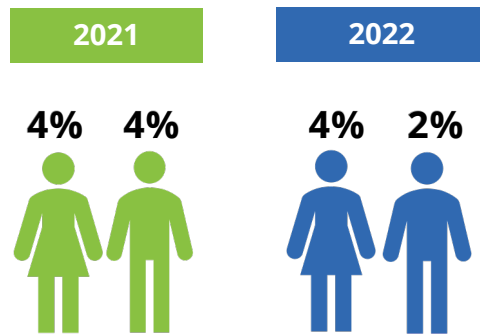
Jan'21-Dec'21 Pop 15+: 43 099 774

Jan'22- Dec'22 Pop 15+: 43 592 223

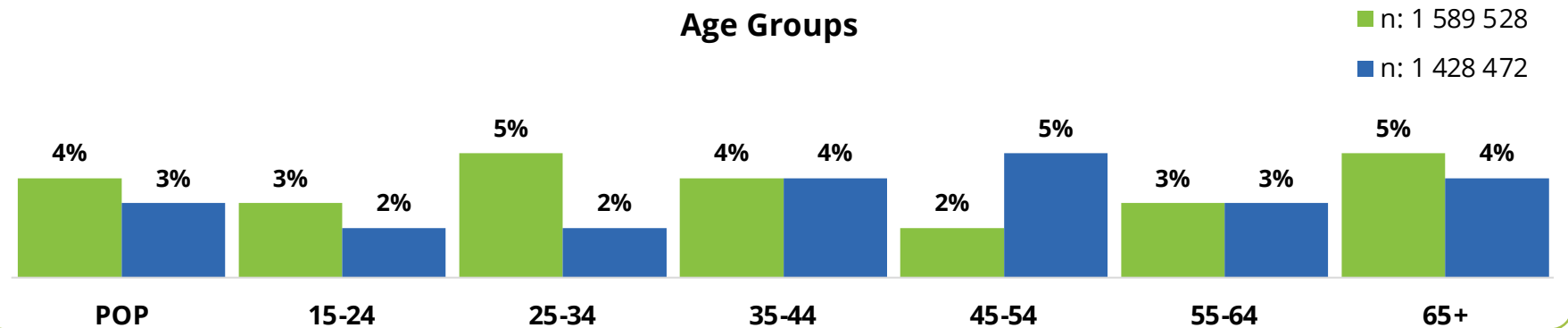
Magazine – Penetration P3M

Jan'21 - Dec'21 Jan'22 - Dec'22

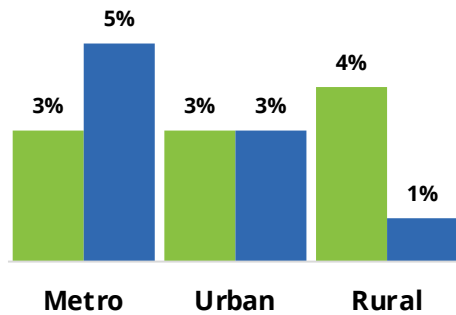
Gender



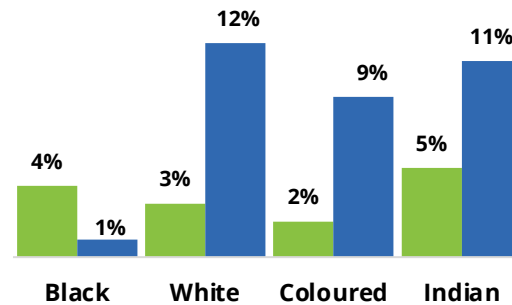
Age Groups



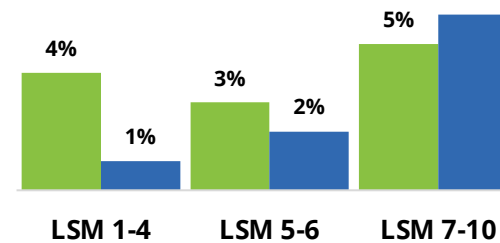
Area



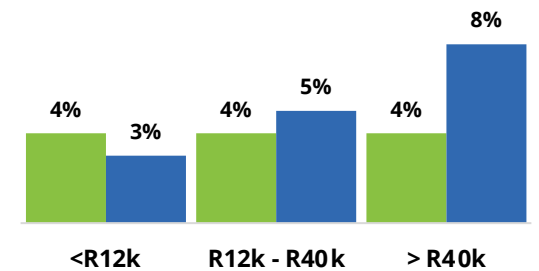
Race



LSM



Monthly Household Income



Jan '21-Dec '21 Pop 15+: 43 099 774

Jan '22-Dec '22 Pop 15+: 43 592 223

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
 - 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



Saving/investment behaviour:

- What do consumers save money towards
- Investment
- Unit trusts and stocks
- Credit purchasing on durable items
- Loans
- What are the reasons consumers take out loans



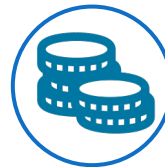
Financial Services

- Use of services such as eWallet, CashSend, mpesa etc.
- Send or receive money – how much?
- Use of loyalty programmes
- Store accounts
- Medical aid schemes and related products
- Funeral policies/societies
- Insurance policies – short term/long term by Company
- Decision making process to consider insurance



Stokvels

- Belong to a stokvel
- How many stokvels they belong to
- What is the purpose of the stokvel



SASSA Government Grants

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



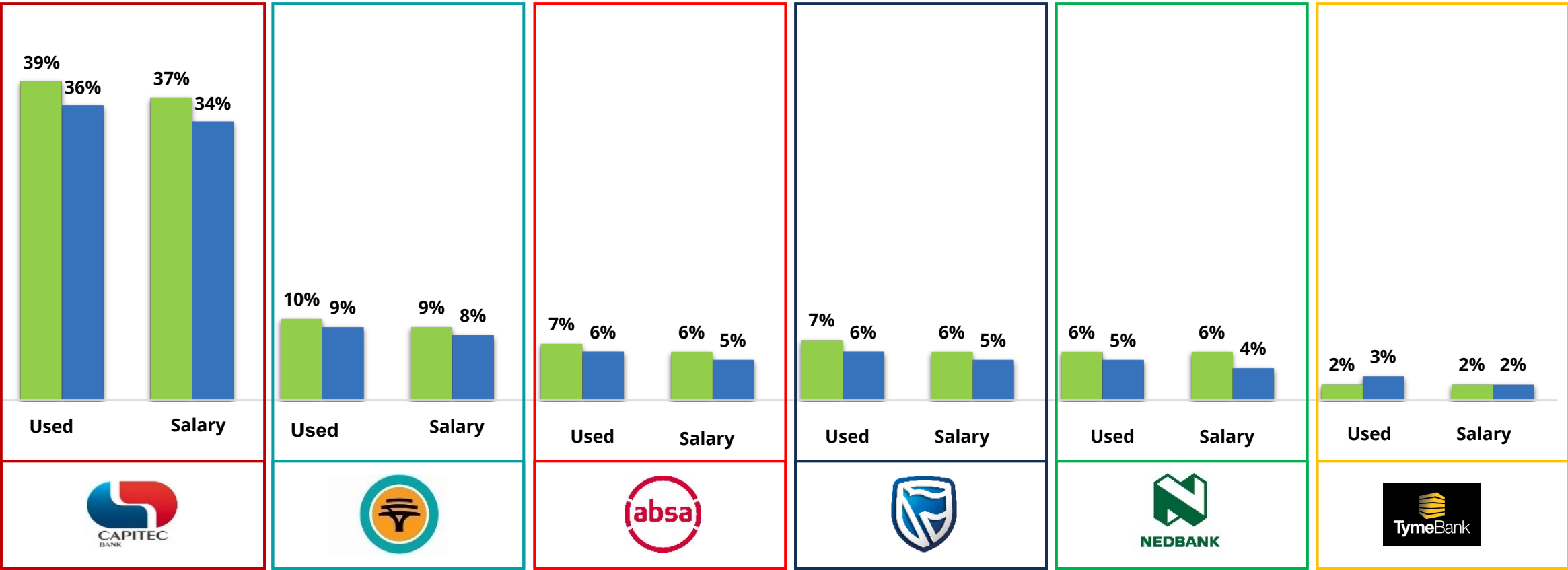
Other

- Monthly and annual expenditure

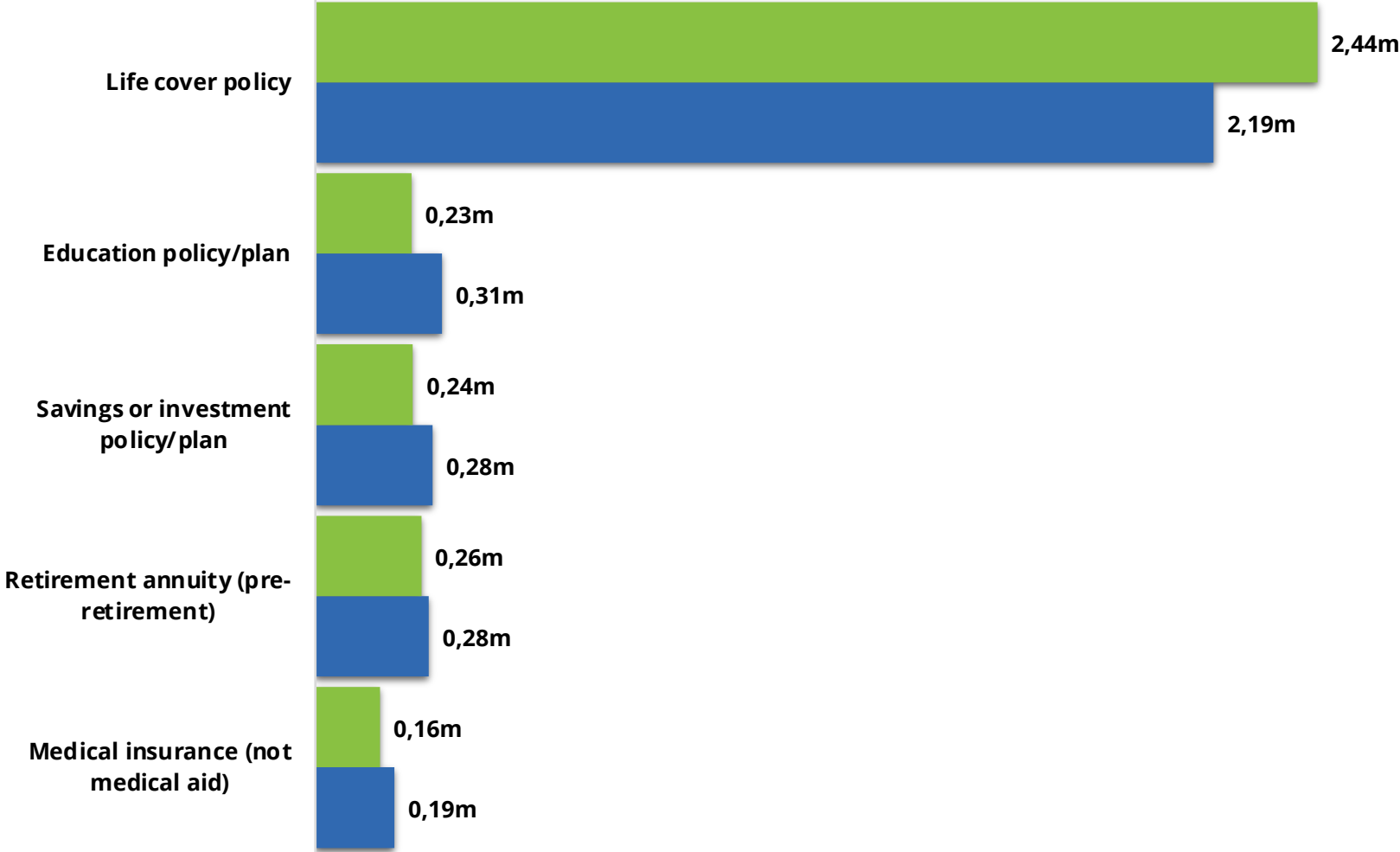
Banks

Banked
Population
61%

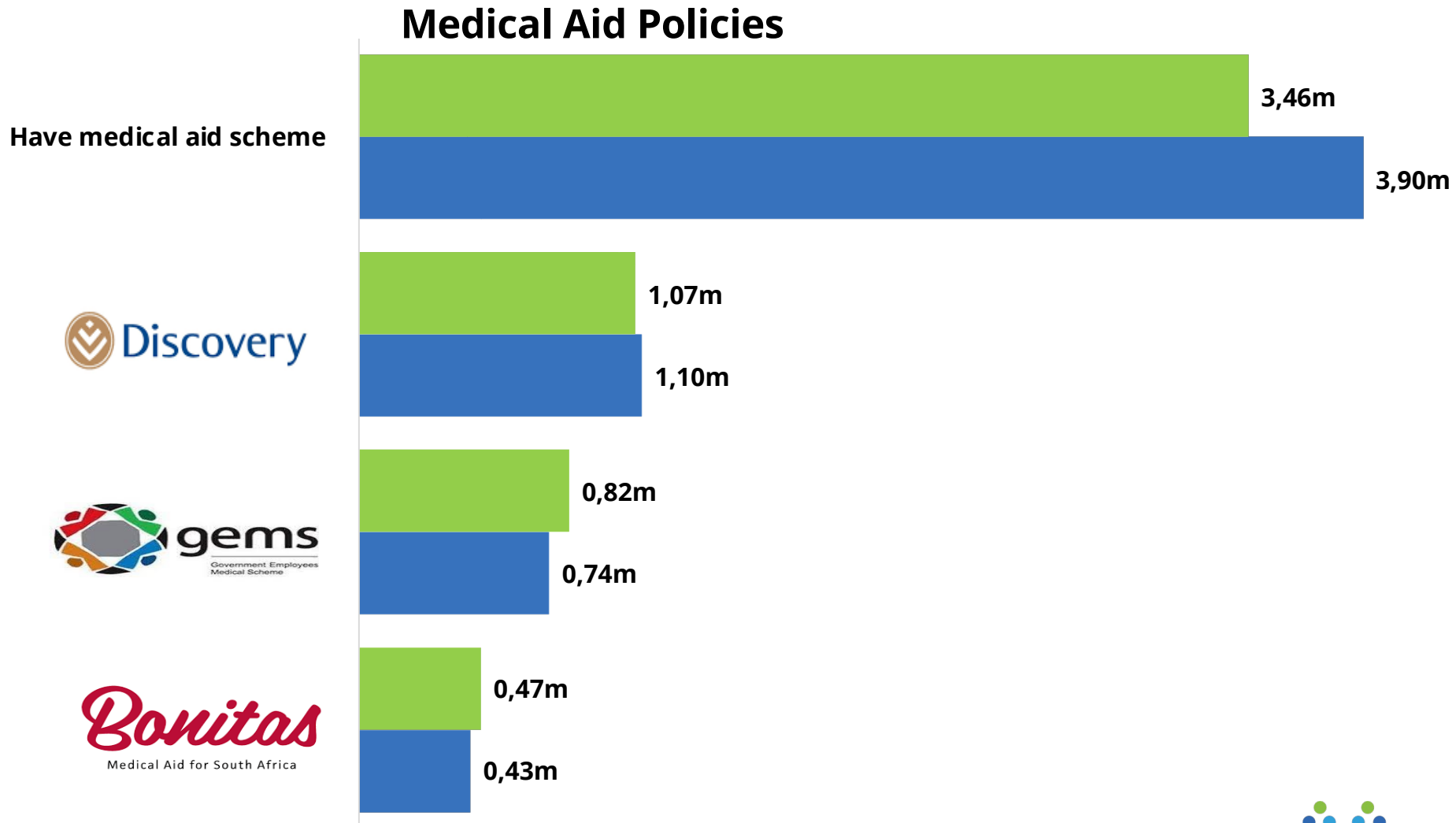
Bank Usage and Salary Deposit Accounts



Long Term Insurance



Medical Aid Policies



Jan'21-Dec'21 Pop 15+: 43 099 774

Jan'22-Dec'22 Pop 15+: 43 592 223

Retail



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RESEARCH

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

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

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

Brand Categories Measured

Baby Items

- Baby Food
- Infant cereal/Baby porridge
- Infant formula
- Disposable nappies

Health care

- Indigestion remedies
- Throat sinus remedies
- Cough/cold/flu remedies
- Headache tablets/powders
- Vitamins/supplements
- Slimming tablets
- Healing ointment
- Infant cereal/Baby porridge
- Infant formula
- Disposable nappies

Personal care

- Bath additives
- Body wash/shower gel
- Hand/body cream/lotion
- Aerosol Deodorant for men and women
- Roll on Deodorant for men and women
- Razor Blades Disposable
- Sanitary products for women
- Cosmetics
- Blemish preparations
- Facial cleansing products
- Shaving cream/gel
- Anti dandruff shampoo/conditioner/treatment
- Shampoo
- Hair conditioner
- Hairstyling products
- Hair colourant
- Antiseptics
- Toothpaste
- Toothbrush

Note: Subscribers are able to request measurement of products

Brand Categories Measured Cont.

Household Supplies

- Air freshener
- Insecticides
- Toilet cleaner
- Household cleaner
- Floor cleaner
- Dishwashing liquid
- Machine dishwashing powder/tables
- Washing powder
- Fabric softener
- Batteries

Paper Items

- Toilet paper
- Kitchen paper
- Facial tissue

Snacks & Sweets

- Savoury biscuits
- Sweet biscuits
- Chocolate bars/Candy coated chocolate
- Chocolate slab
- Chocolate assortment
- Chewing gum
- Sweets
- Potato chips
- Peanuts, mixed nuts
- Flavoured nuts
- Dried fruit

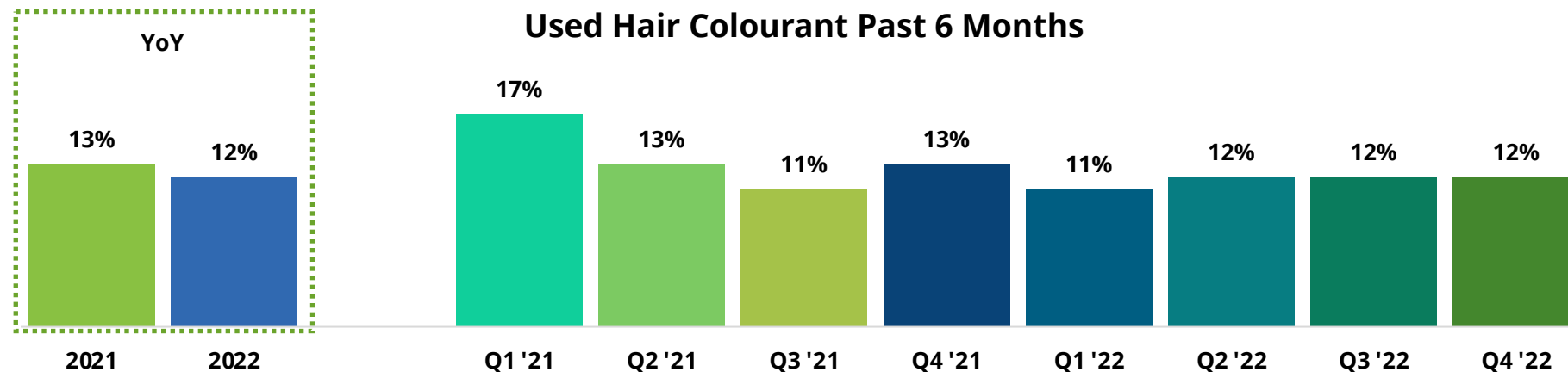
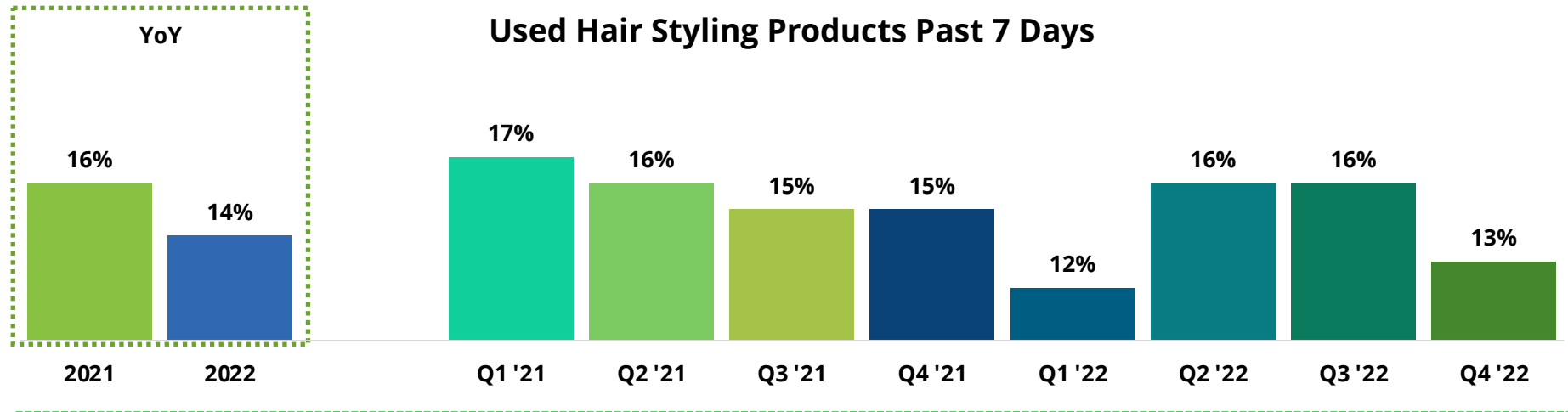
Beverages (not full list)

- Teas
- Fruit juice
- Energy drinks
- Bottled water

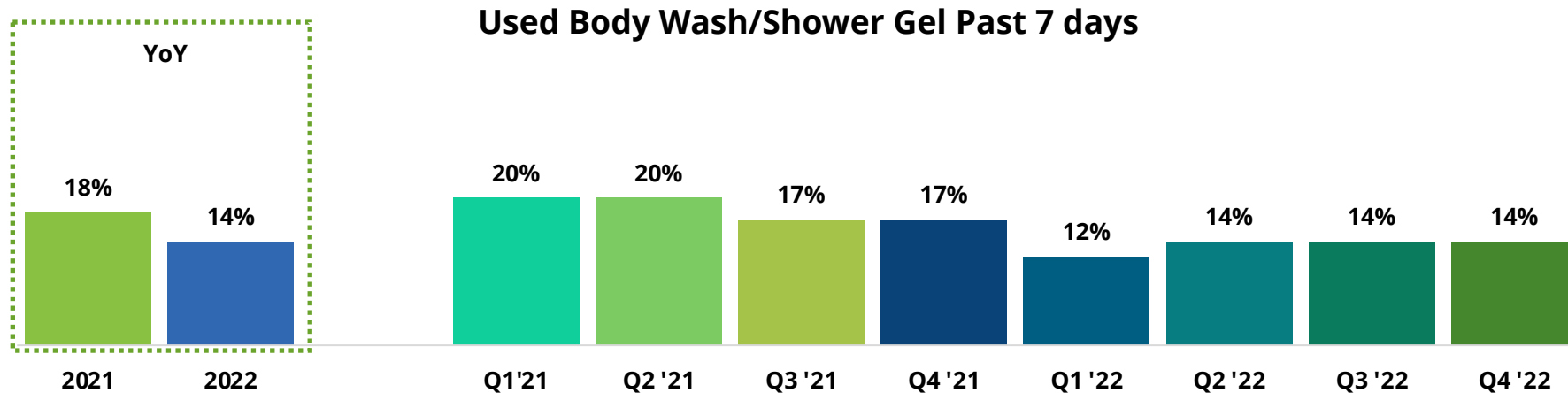
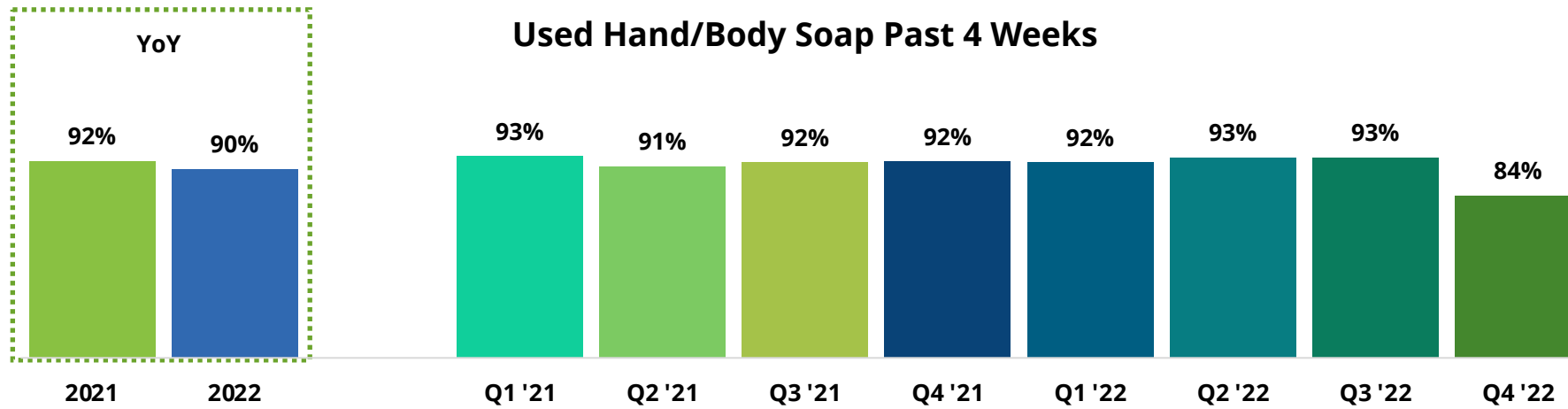
Pets

- Petfood

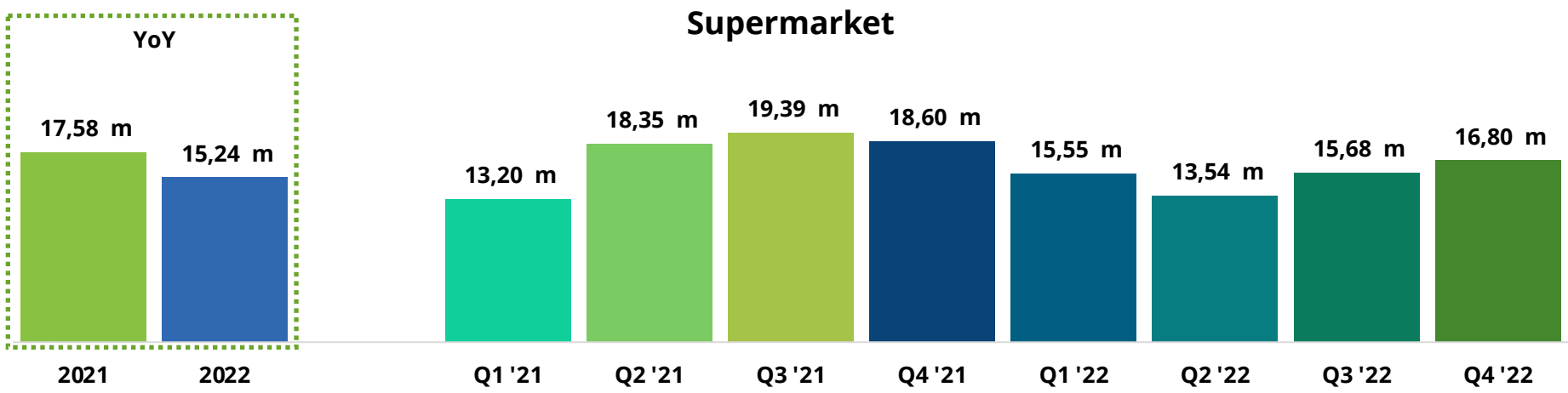
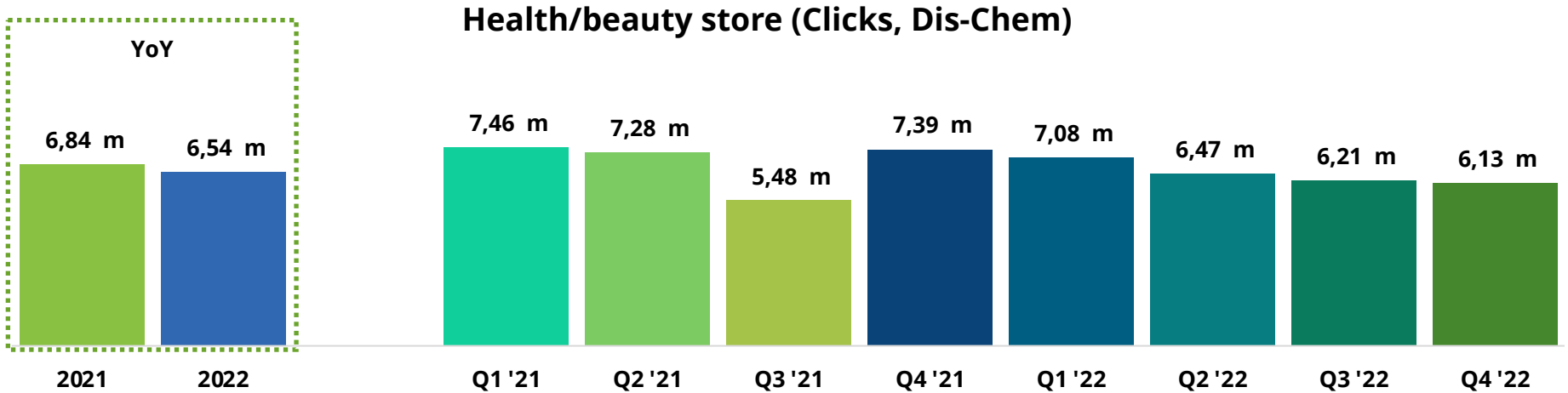
Trends: Product Usage - % of Pop



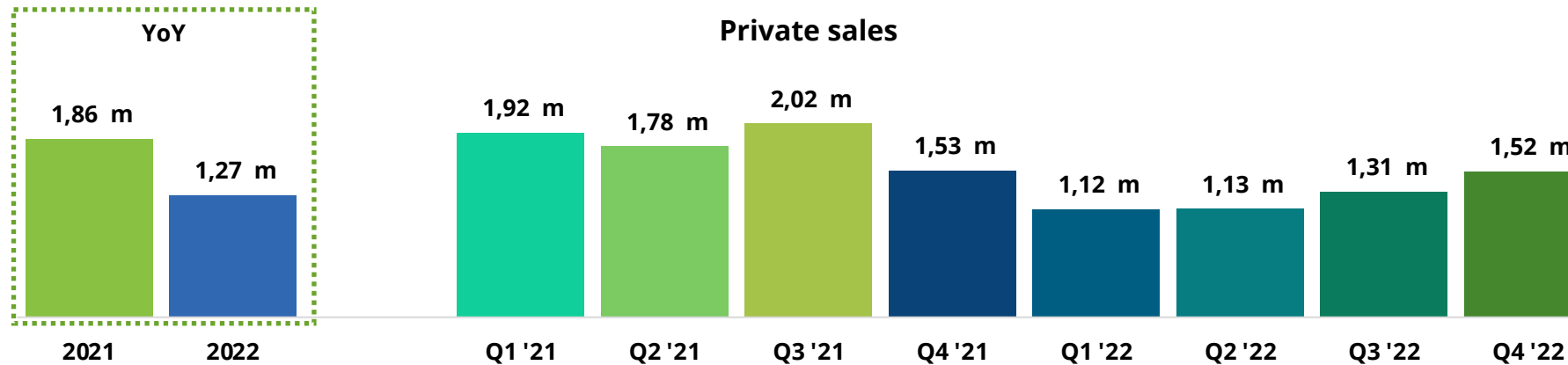
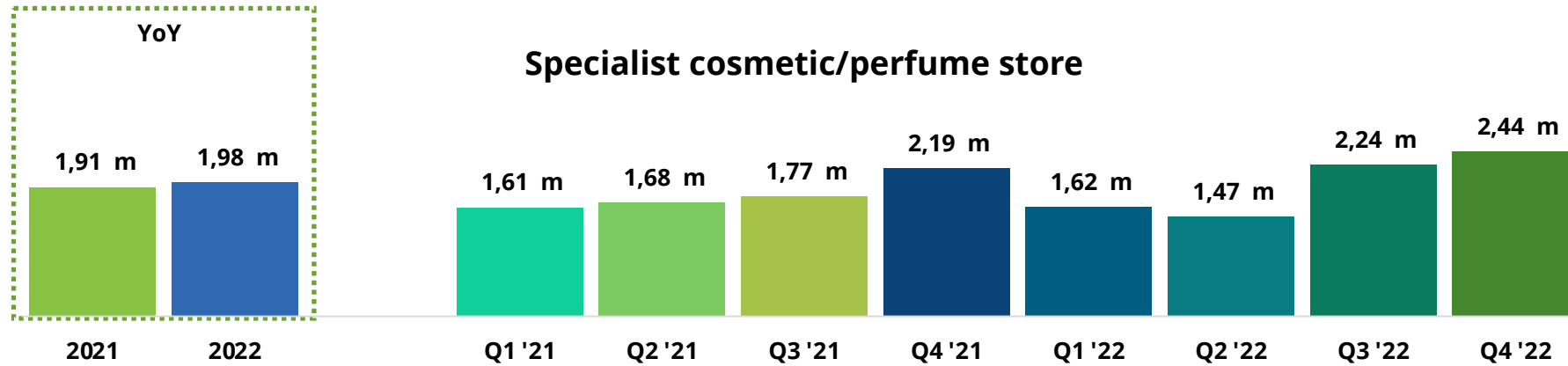
Trends: Product Usage - % of Pop Cont.



Beauty and Cosmetic Products usually bought from:



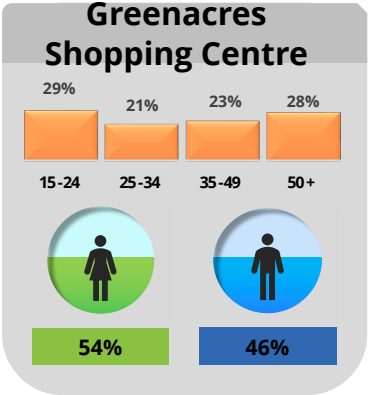
Beauty and Cosmetic Products usually bought from Cont:



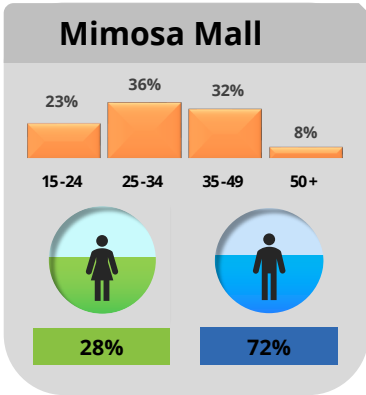
Malls Visited P4W

Malls Visited
(P4W)
54%

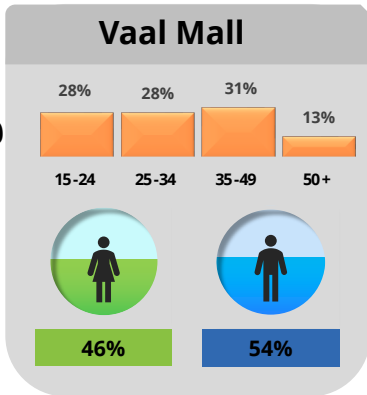
Eastern Cape



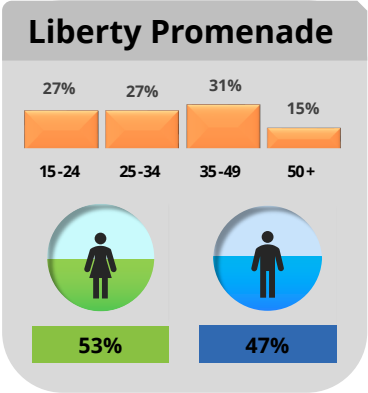
Free State



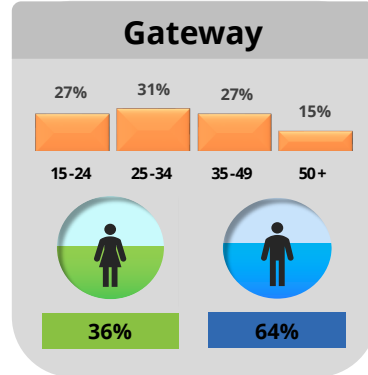
Gauteng



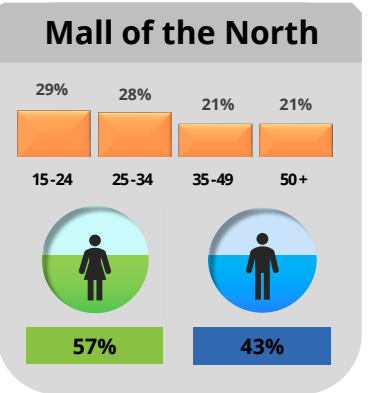
Western Cape



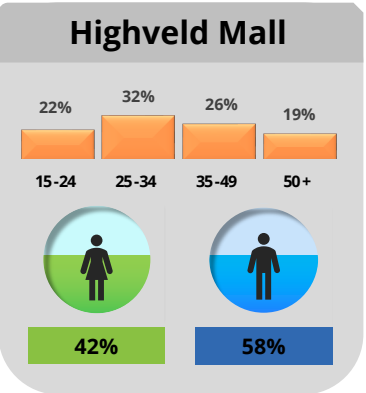
Kwa Zulu Natal



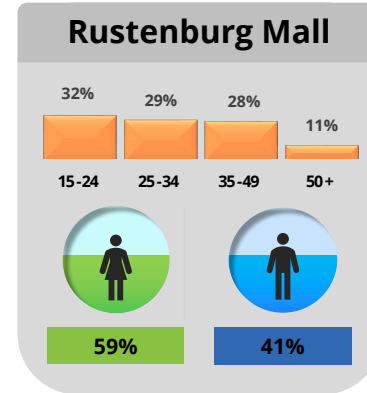
Limpopo



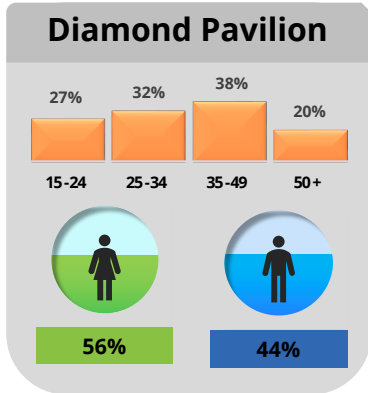
Mpumalanga



North West



Northern Cape



Fast food P4W - Brand X vs Brand Y

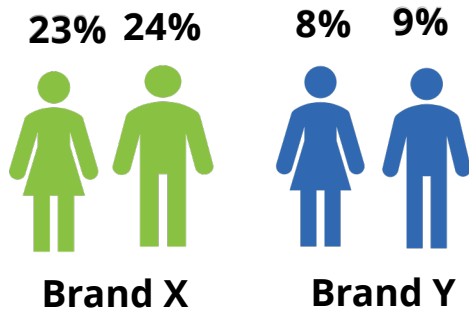


Brand X

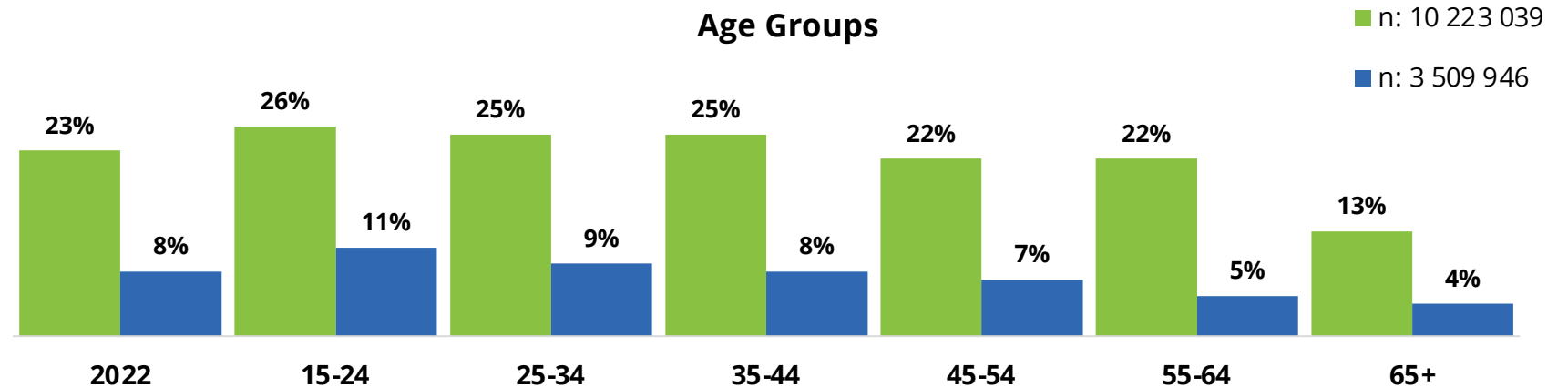


Brand Y

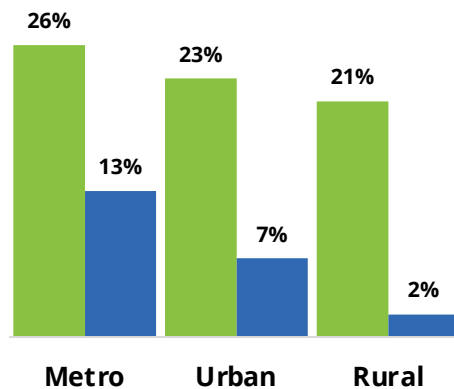
Gender



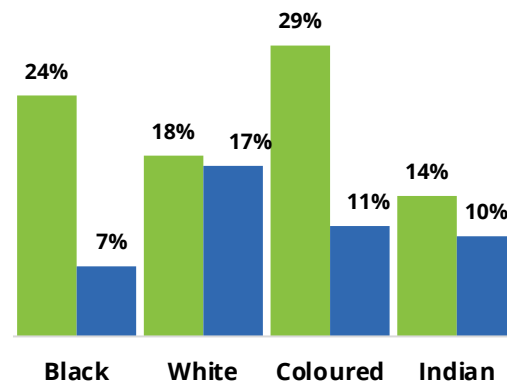
Age Groups



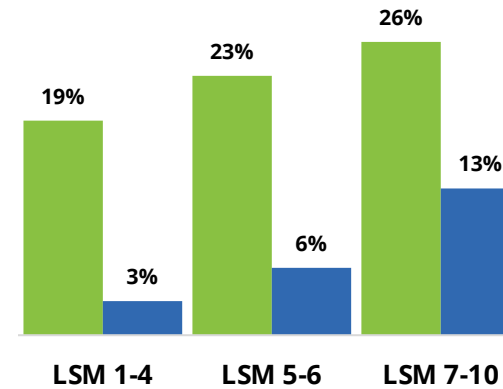
Area



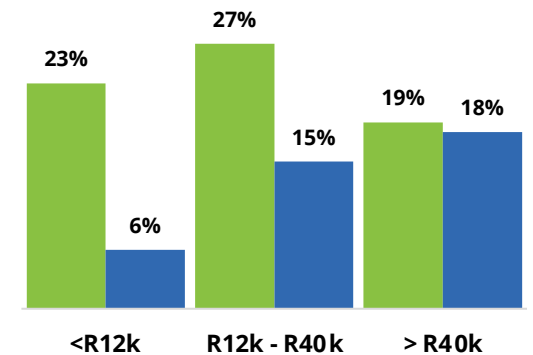
Race



LSM



Monthly Household Income



GeoMaps



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GeoScope South Africa

GeoMAPS

Geocoded MAPS* data

Helping brands understand their market and consumer purchasing behaviour to develop targeted advertising, marketing and communication strategies.



** MAPS – Marketing All Product Survey, is a product of the Marketing Research Foundation (MRF)*

MAPS REPORT | Prepared by Plus 94 Research 2023



GeoScope South Africa

What is GeoMAPS?

It gives MAPS a geographic context, using location to add a visual dimension to consumer data, empowering you to visually pick up on trends and patterns at a neighbourhood level.

** MAPS – Marketing All Product Survey, is a product of the Marketing Research Foundation (MRF)*

MAPS REPORT | Prepared by Plus 94 Research 2023





GeoScope South Africa

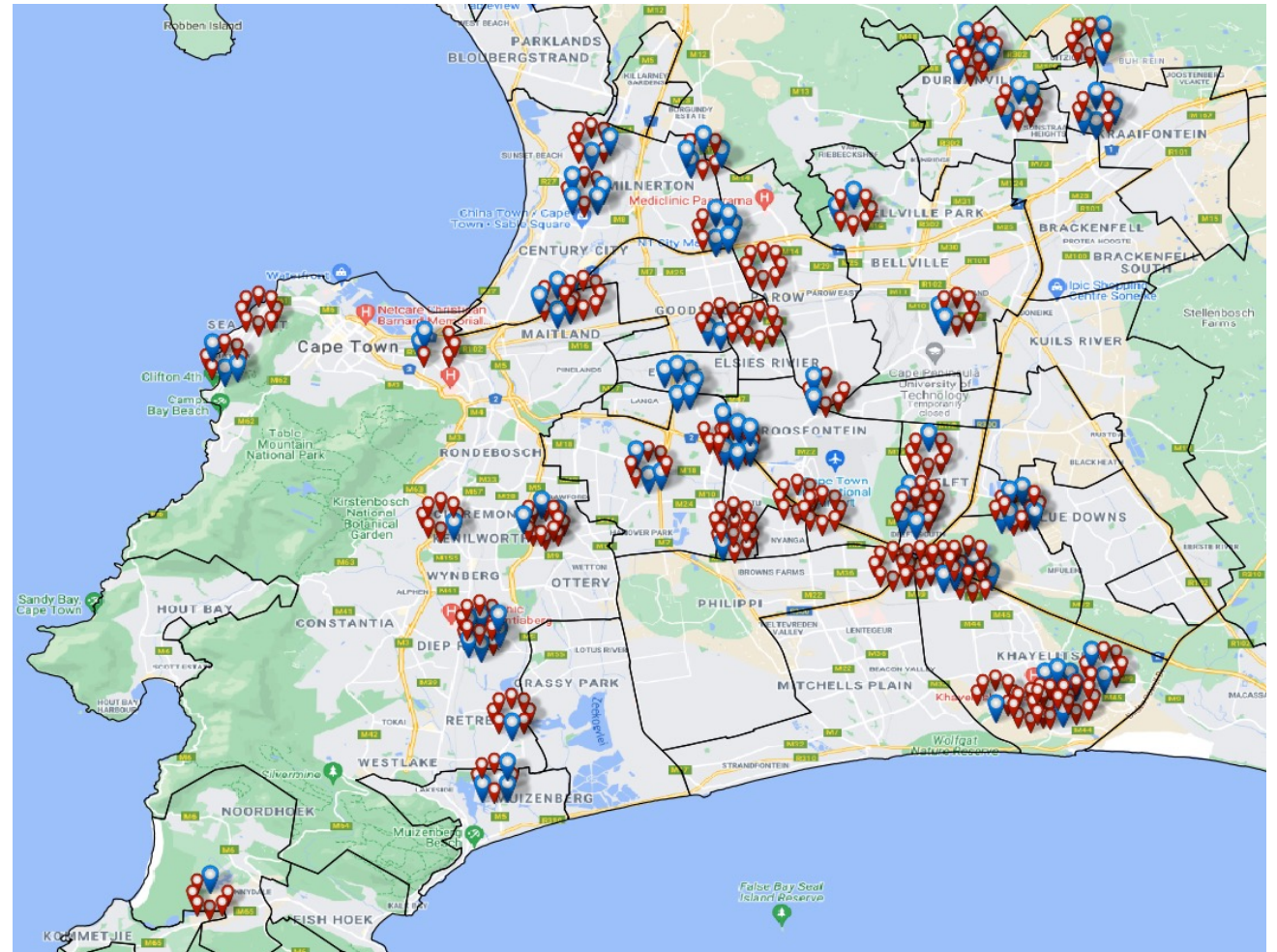
Why GeoMAPS?

The GeoMAPS innovation of MAPS is the next level of analysis.

We are living in a world where understanding the consumer's location is critical to all strategic decision making.

*** MAPS – Marketing All Product Survey, is a product of the Marketing Research Foundation (MRF)**

MAPS REPORT | Prepared by Plus 94 Research 2023



Future Dynamics



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Future Dynamics

- Small slice of shifts in the South African economy and the life of the consumer
- Mounting pressure on maintaining the standard of living they have enjoyed until 2020
- Downward spiral into hardship for many
- Thrift spending
- Basic necessities becoming more and more expensive
 - Either cut down on cost or cut the product
- Impact on both retailers and manufacturers
- How do businesses navigate this volatile and uncertain environment
- Maps is an indispensable strategic tool in decision making.

Further Information

For further information regarding subscribing to MAPS, please mail us at

mrf@mrfsa.co.za

[Marketing Research Foundation \(mrfsa.org.za\)](http://mrfsa.org.za)

Thank You



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