MAPS DATA OVERVIEW:
Jul ‘20 – Jun ‘23

January 2024

MARKETING RESEARCH FOUNDATION

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Research Universe and Methodology

Universe:

AGE

15 years and older

GENDER

Males and females

RACE

All racial groups (Black, White, Coloured, Indian)

AREA

All 9 provinces

ACHIEVED SAMPLE

20 004 face-to-face interviews (July 2022-June 2023)

10 002 leave behind diaries (July 2022-June 2023)

TYPE OF RESEARCH

Quantitative

INTERVIEWING METHOD

Tablet-Assisted Personal Interviewing (TAPI) for face-to-face questionnaire.

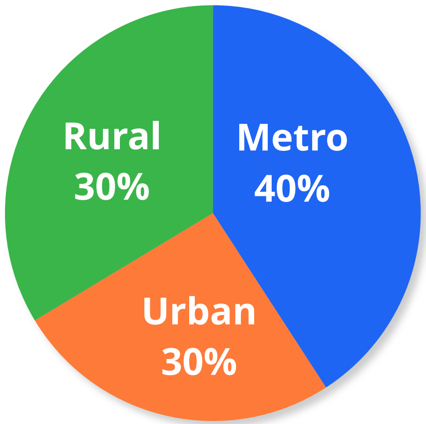
Self-administered paper & pencil or online interviews for leave behind questionnaire

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

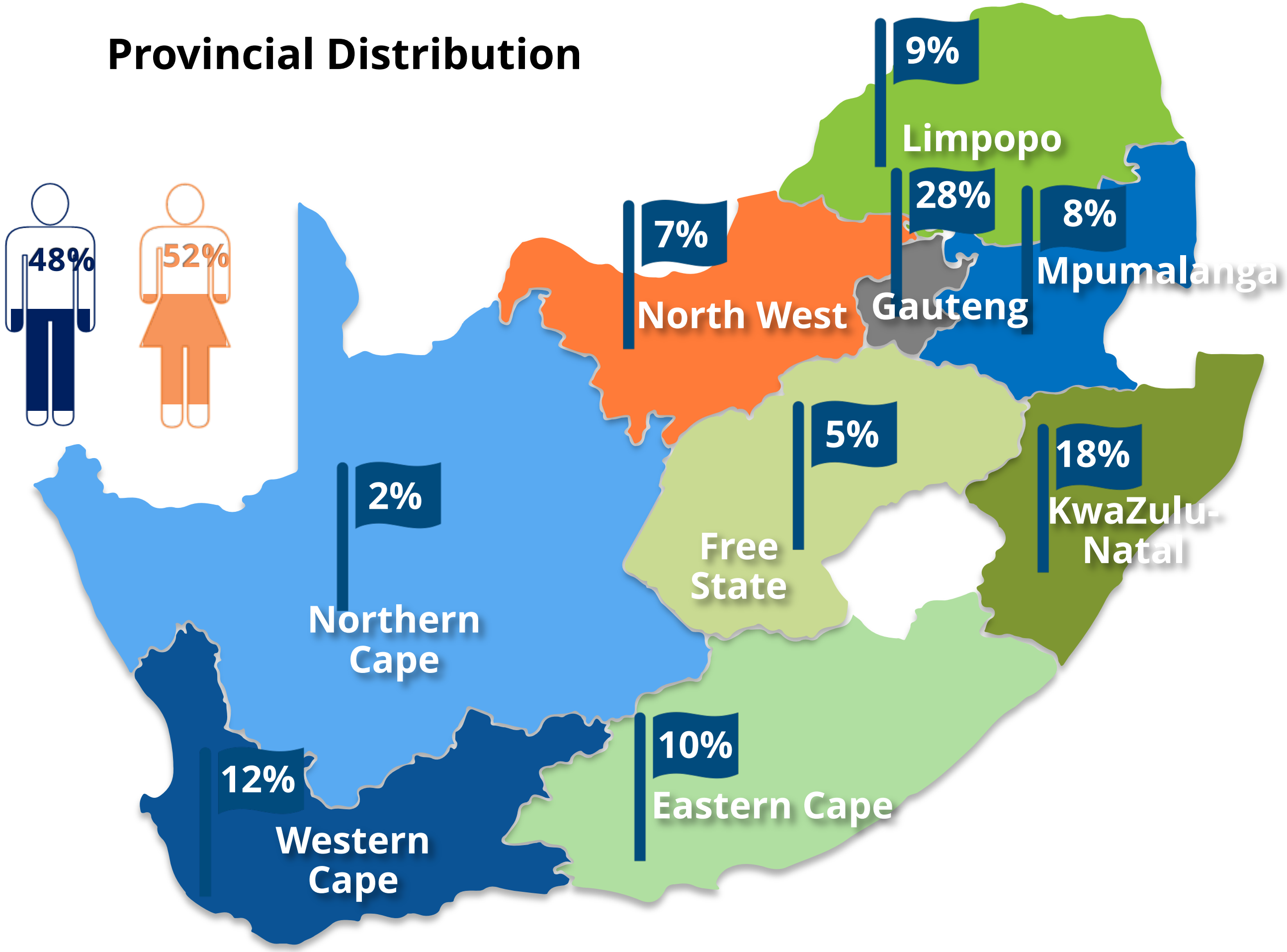
Demographics

Demographics: Jul'22 – Jun'23

Area Distribution



Provincial Distribution



Households

18.48m

People per household

3.7

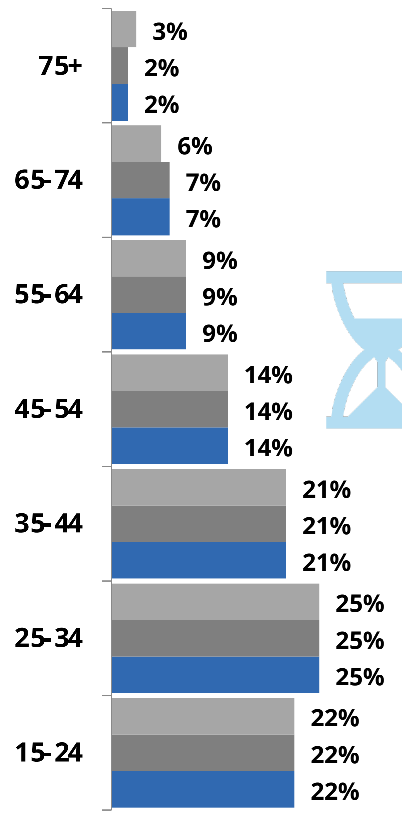
*According to StatsSA (2022), the South African population is 60.6 million people.

Jul '22- Jun '23 Pop 15+: 43 592 223

Demographics: YoY Shifts

Q3 ’20 to Q2 ‘21 | Q3 ’21 to Q2 ‘22 | Q3 ’22 to Q2 ‘23

Age Groups

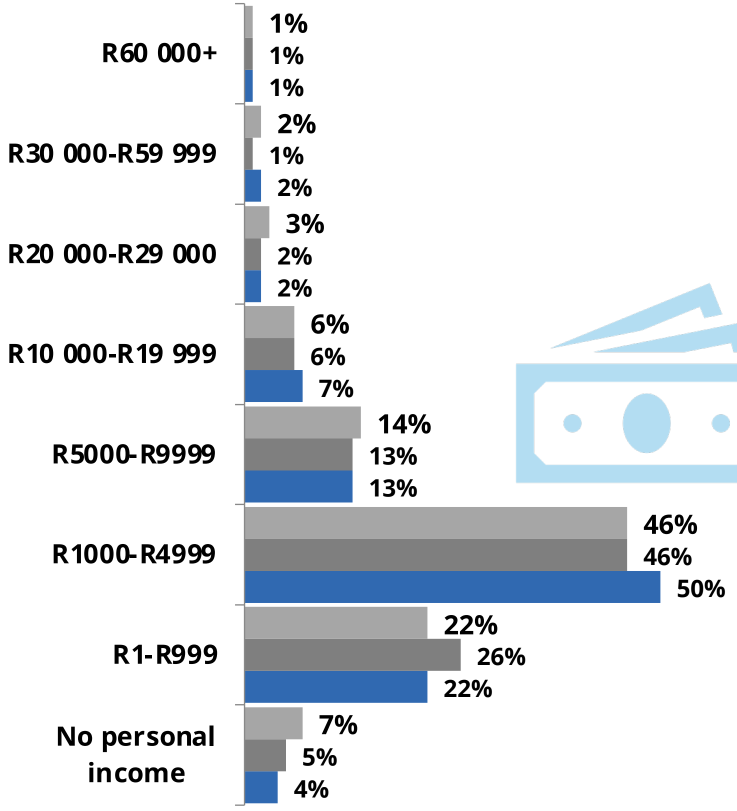


Average age: 38

Average age: 38

Average age: 38

Personal Income

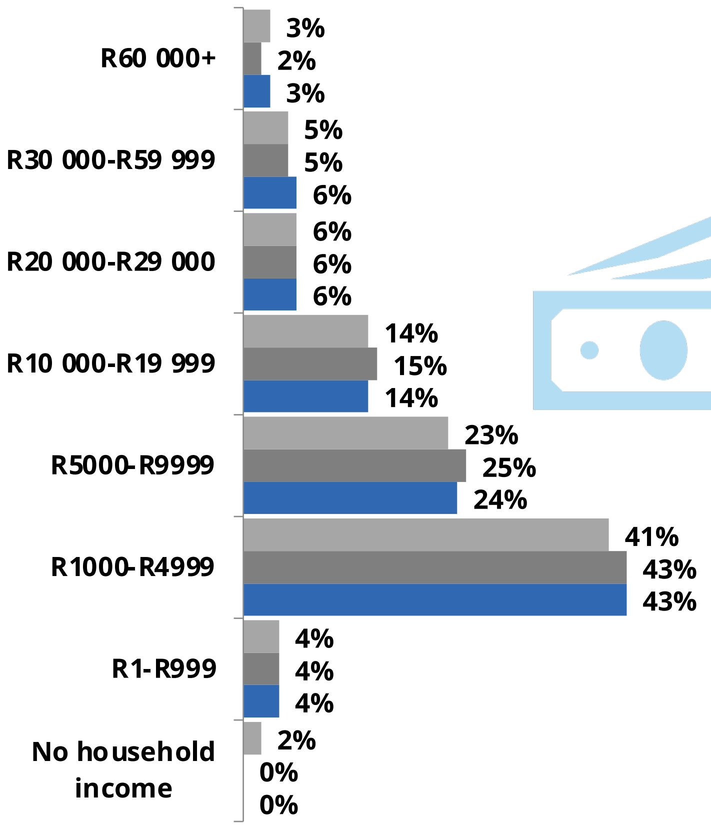


Average Income: R4 815

Average Income: R4 609

Average Income: R4 814

Household Income



Average Income: R10 925

Average Income: R10 382

Average Income: R11 394

Jul ’20 - Jun ‘21 Pop 15+: 43 099 703

Jul ‘21- Jun ‘22 Pop 15+: 43 592 223

Jul '22- Jun ‘23 Pop 15+: 43 592 223

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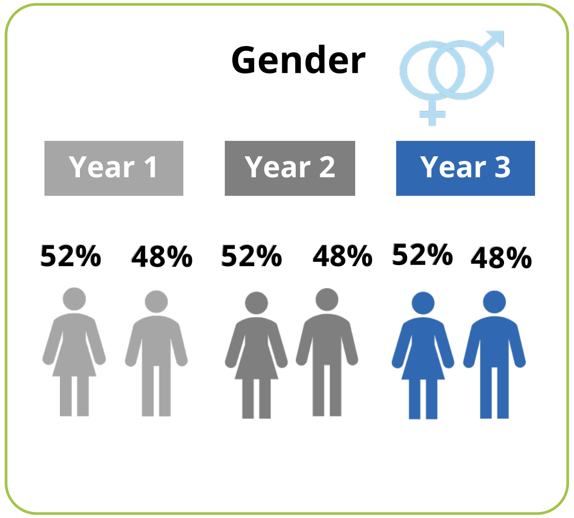
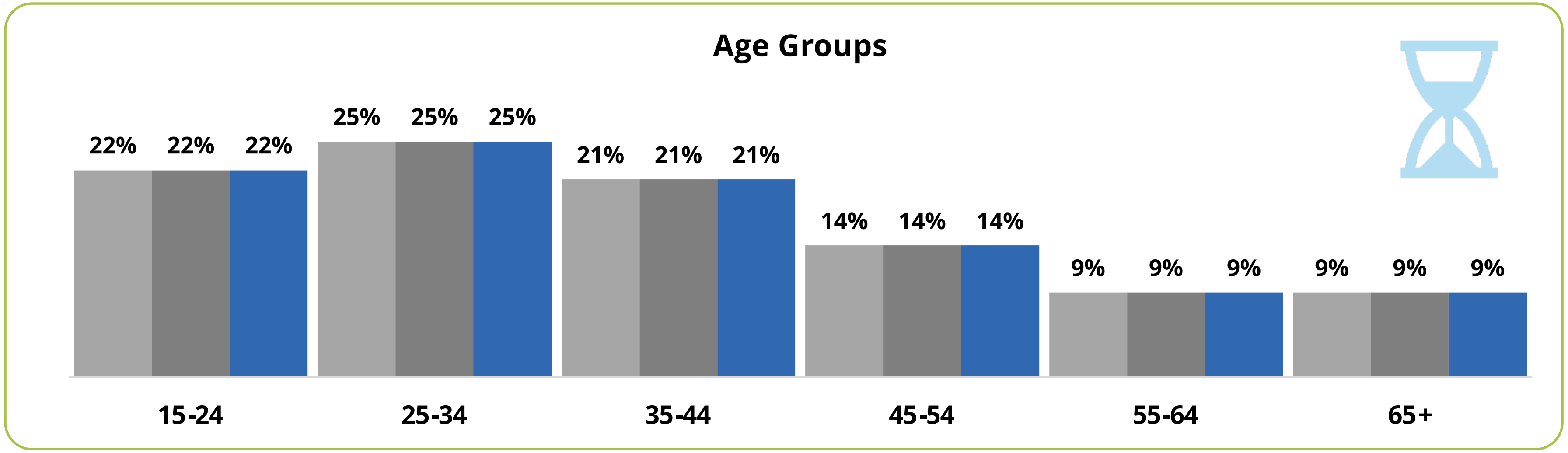
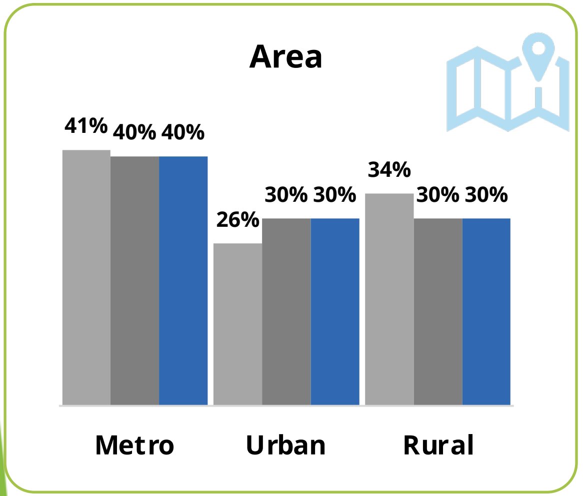
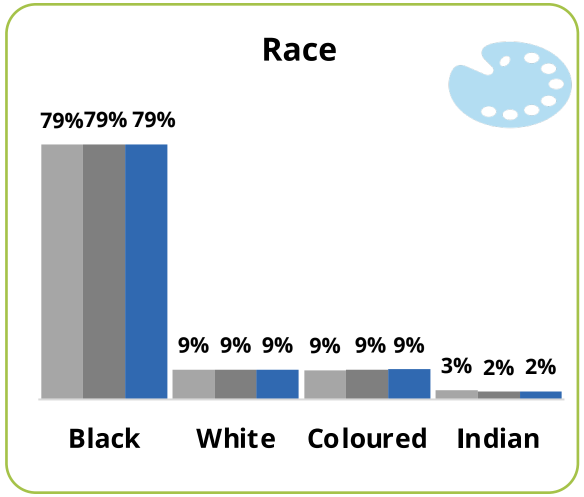
Population: % YoY

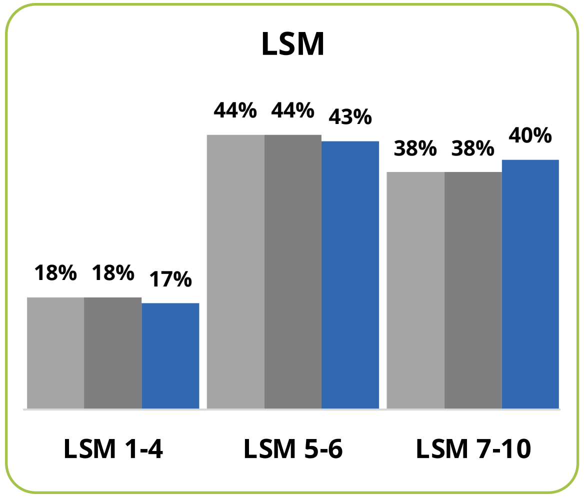
Q3 '20 to Q2 '21 | Q3 '21 to Q2 '22 | Q3 '22 to Q2 '23

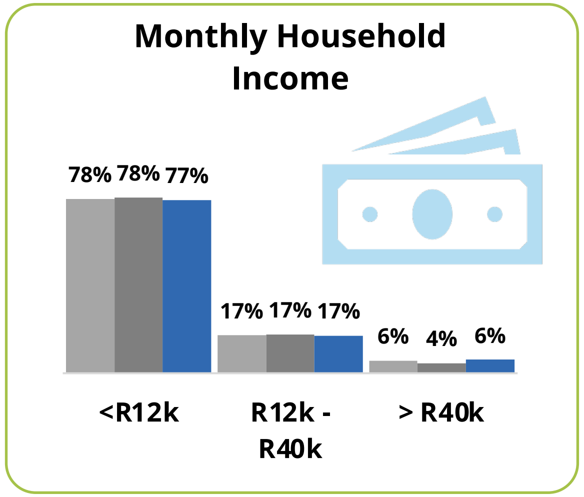












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Economic Landscape

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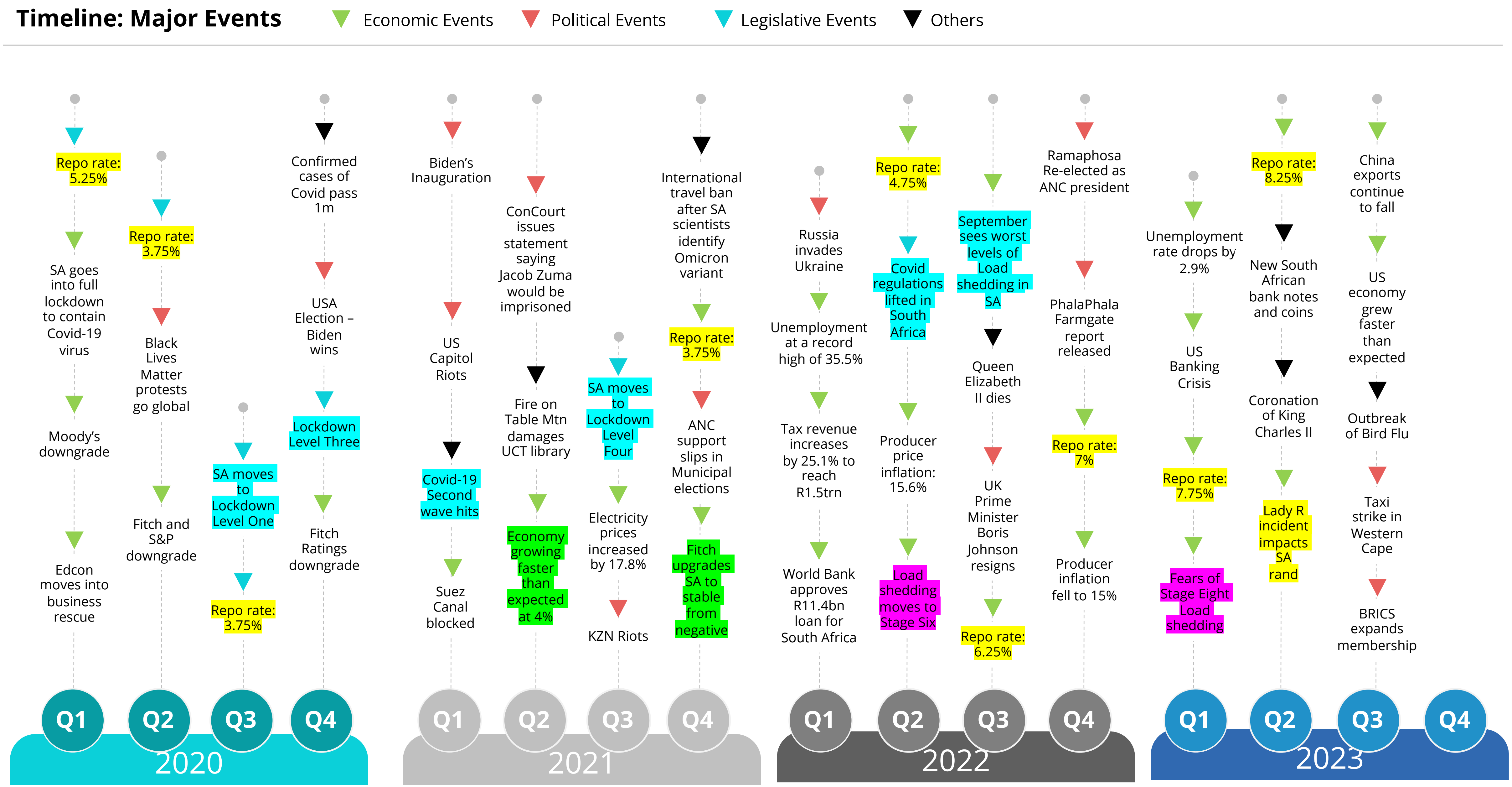
Timeline: Major Events



EIGHTY20

Source: Eighty20 Credit Stress Report 2023 Q3

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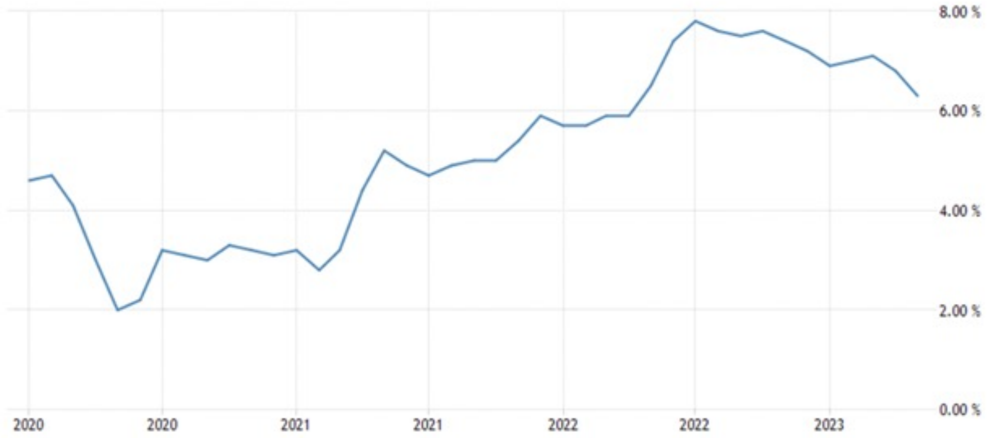
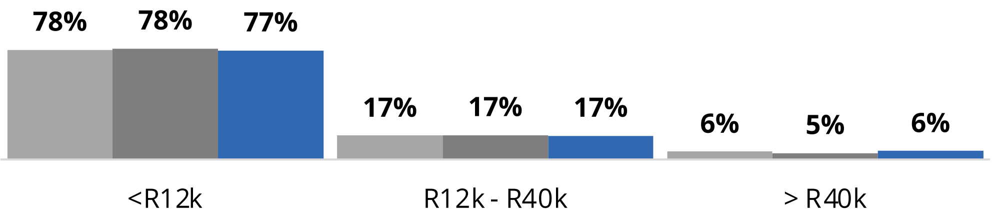
Economic Landscape: % YoY

South African Inflation Rate

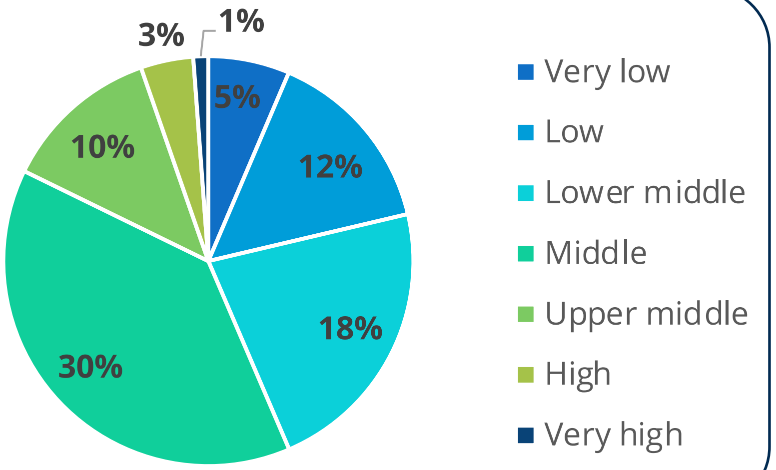


Source: Trading Economics.com

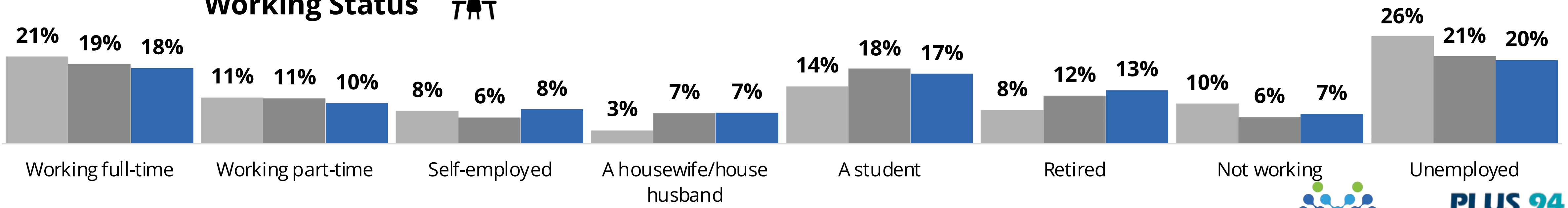
Monthly Household Income



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



Working Status

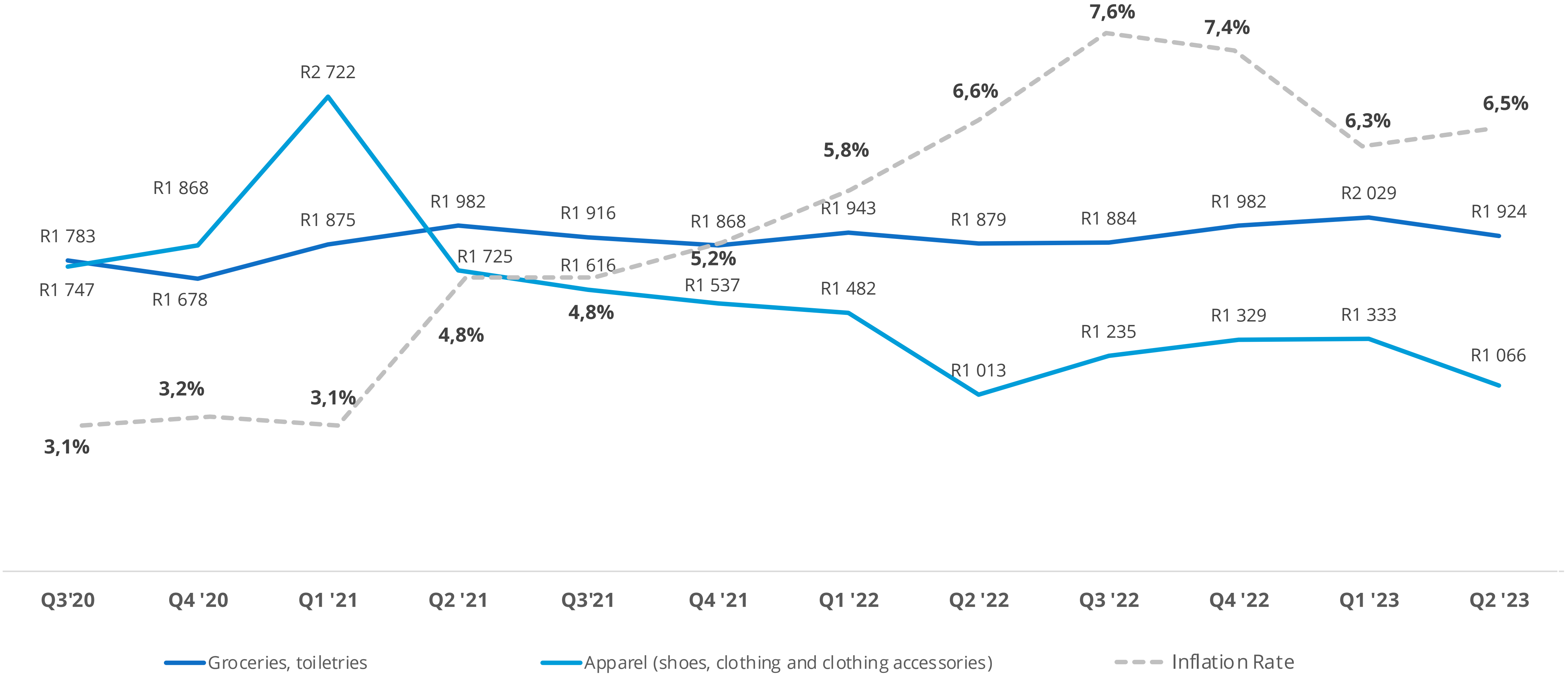


Jul '20 - Jun '21 Pop 15+: 43 099 703

Jul '21- Jun '22 Pop 15+: 43 592 223

Jul '22- Jun '23 Pop 15+: 43 592 223

Average Monthly Spend: Groceries + Toiletries & Apparel: % QoQ



*CPI Inflation rate figures provided by StatsSA (September 2023)

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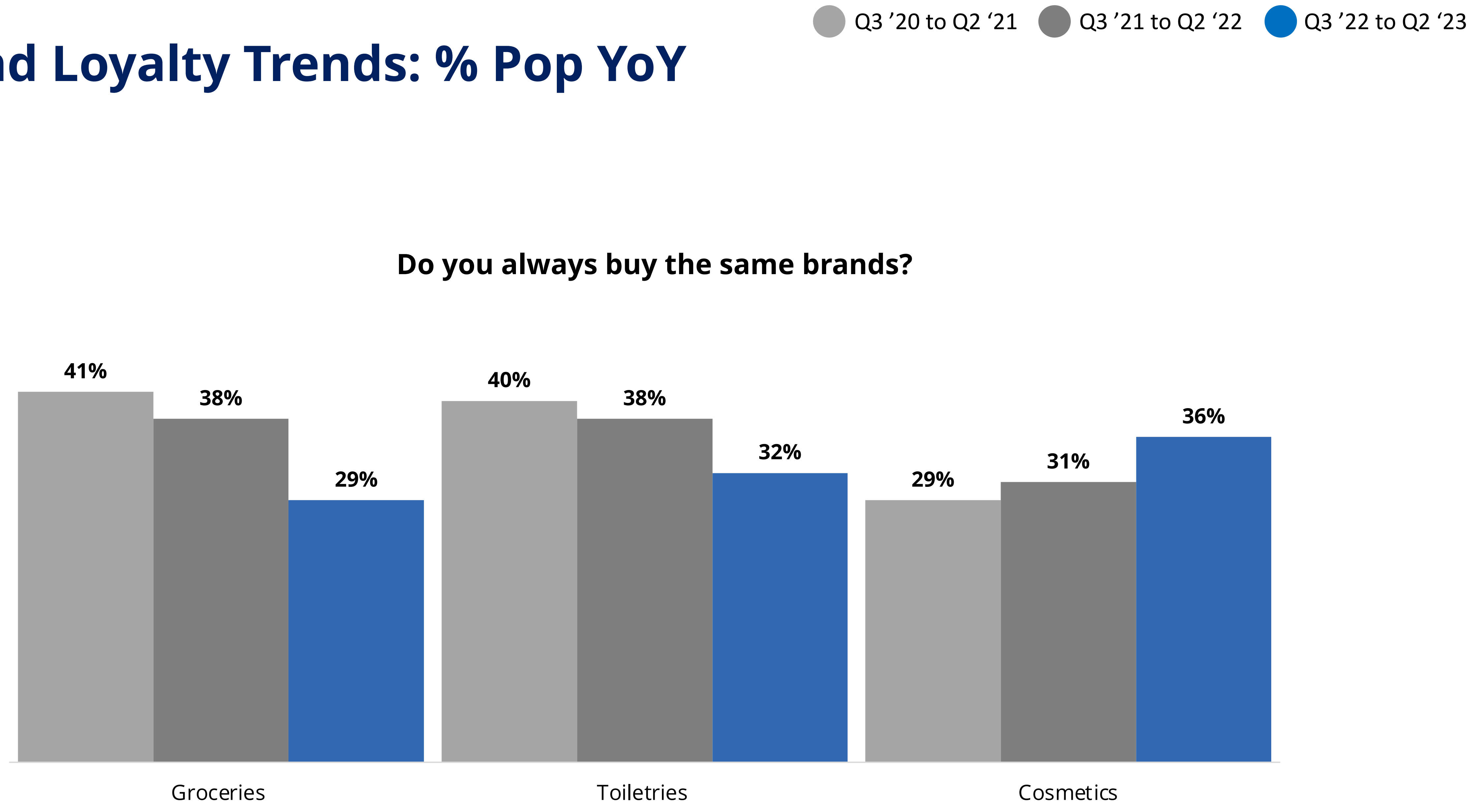
Brand Loyalty Trends: % Pop YoY



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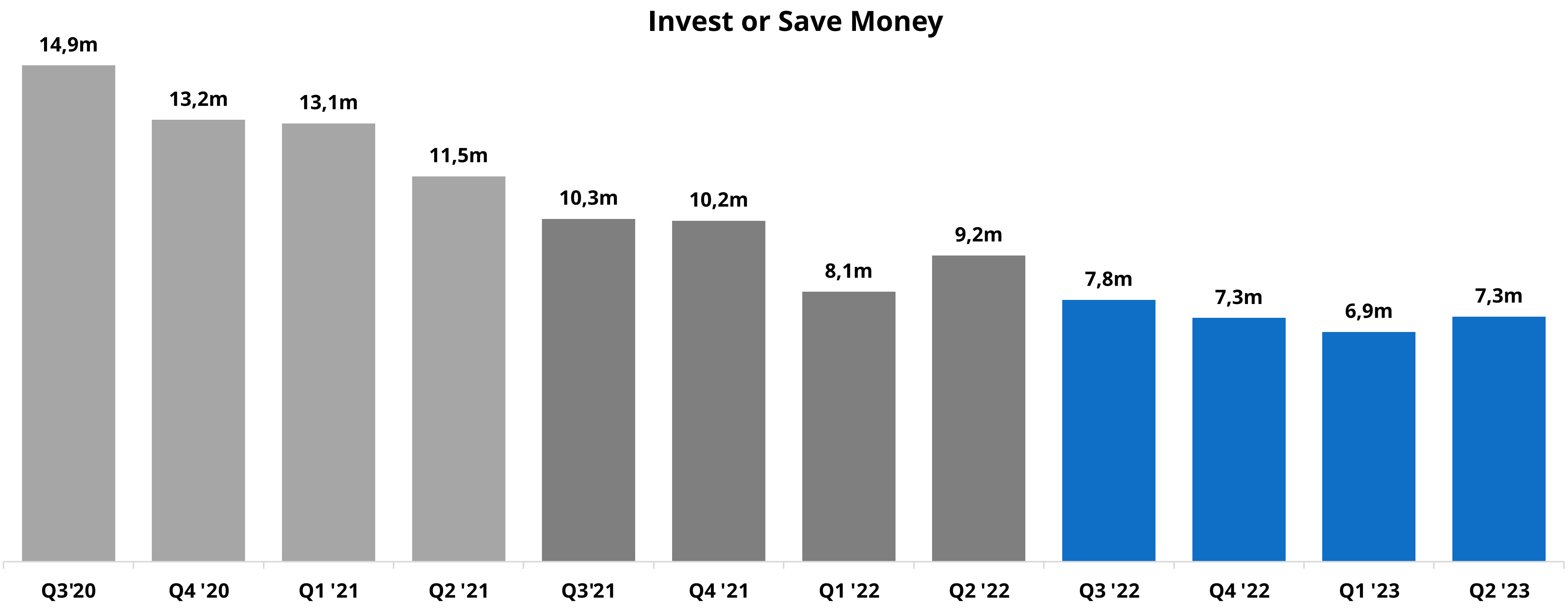
Economic Landscape – Saving QoQ



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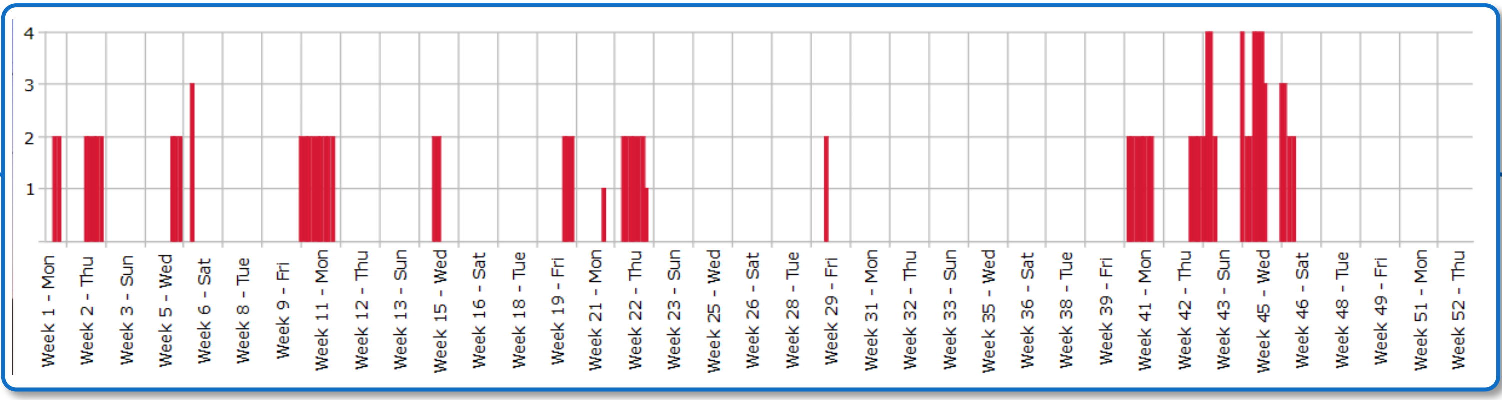
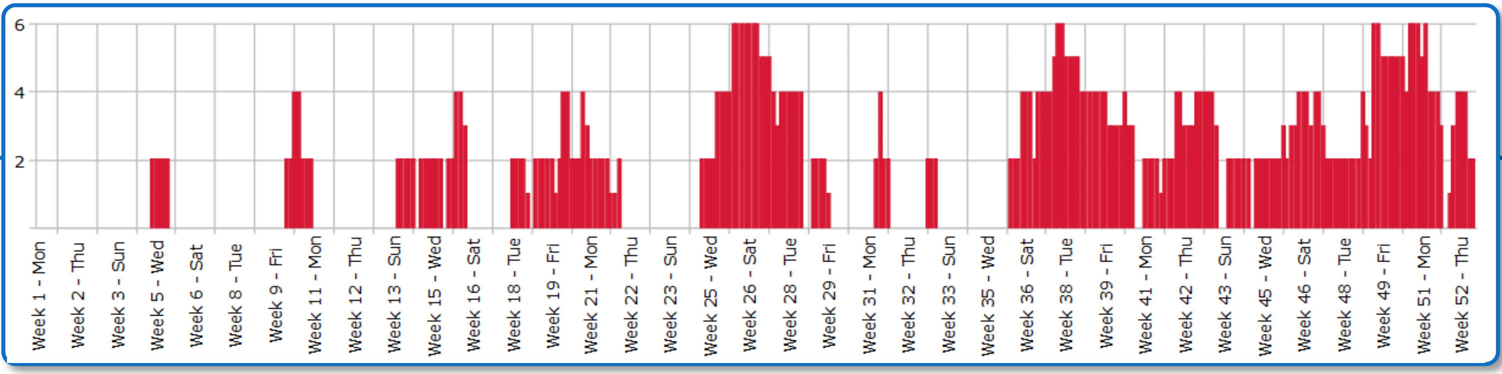
Environment Affecting Media Consumption

2021



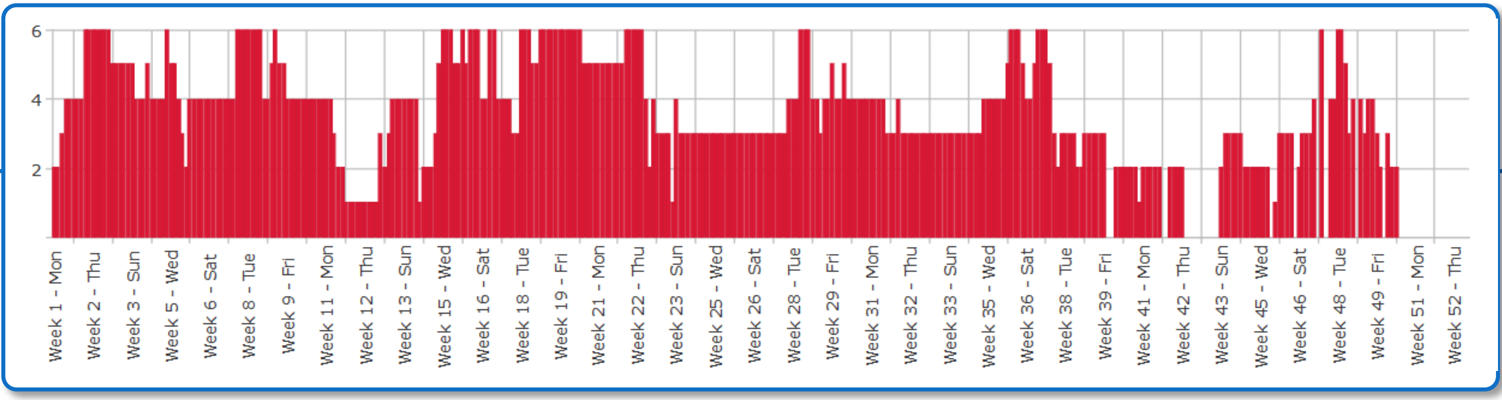
Stage 0-4

2022



Stage 0-6

2023



Stage 0-6

Nielsen Loadshedding Dashboard (Source: BRC SA)

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Media Landscape

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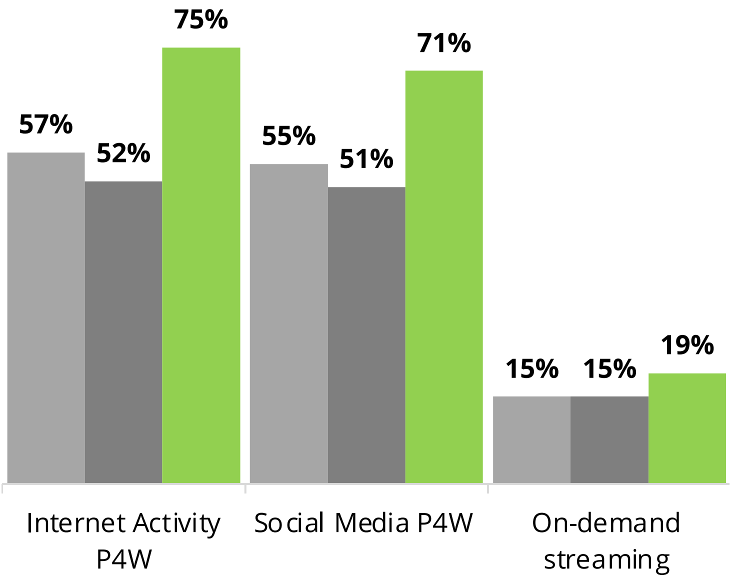
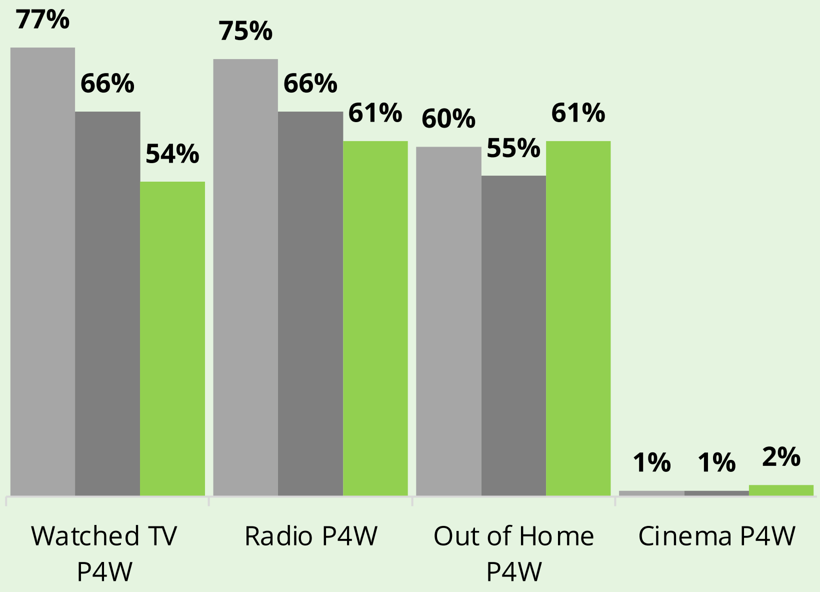
Q3 ’20 to Q2 ‘21 | Q3 ’21 to Q2 ‘22 | Q3 ’22 to Q2 ‘23

Media Penetration Shifts: % Pop YoY

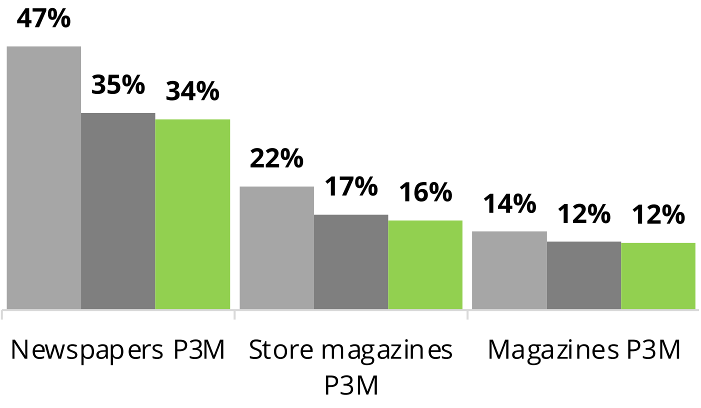
Online Activities



Traditional Media



Print Media



*Year 3 data reflects significant shifts attributed to increased exposure of questionnaire questions to a broader audience.

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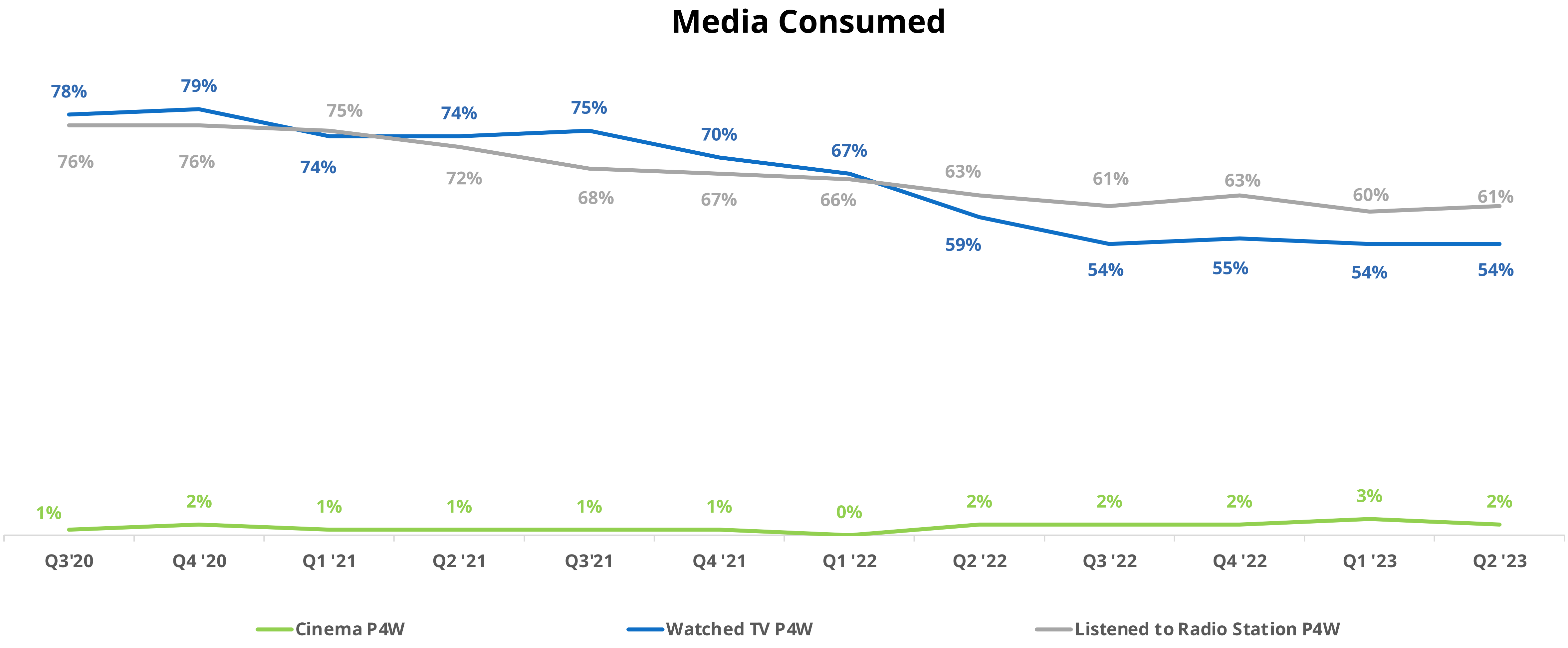
Media Penetration Shifts: % QoQ



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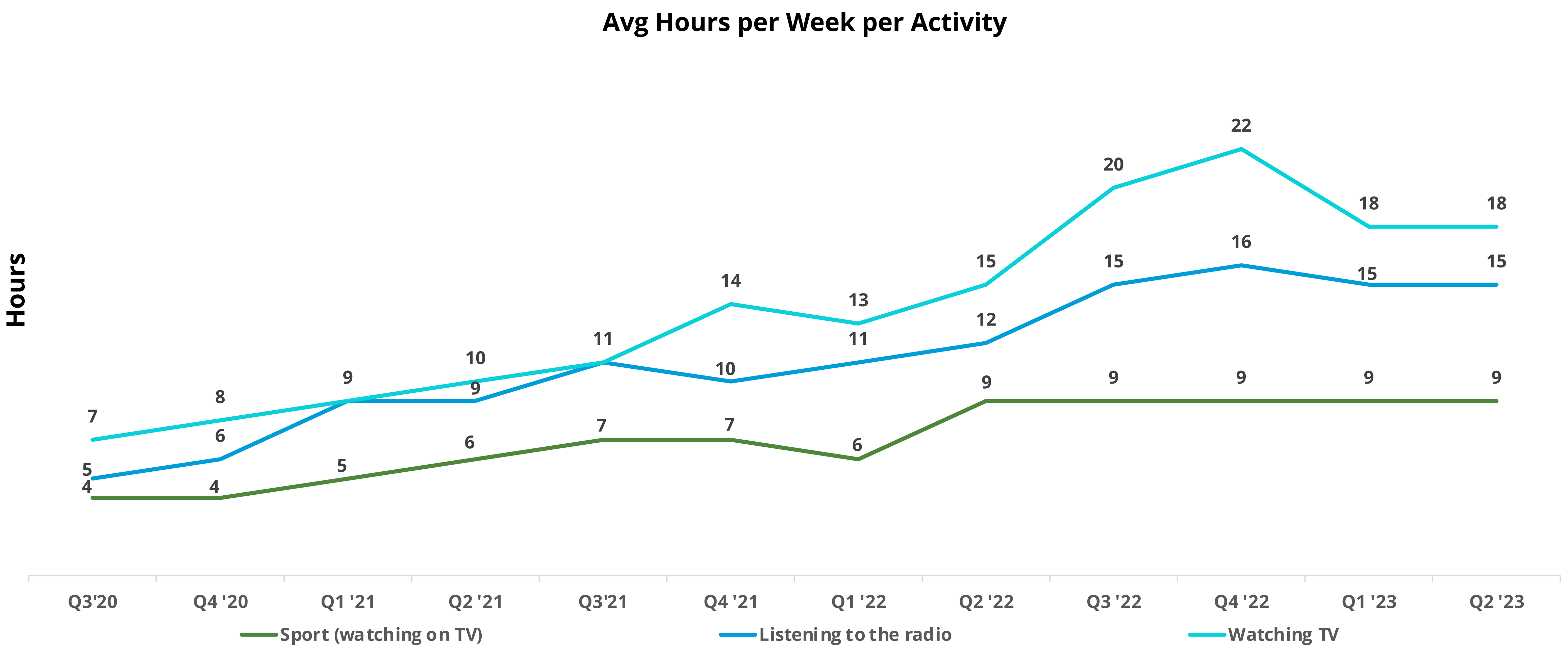
Media Behaviour: QoQ



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Cinema Landscape (P4W)

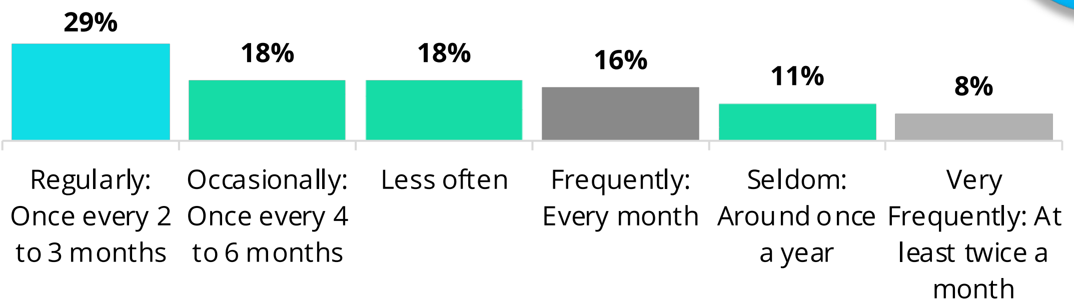
Cinema (P4W) Penetration 2%

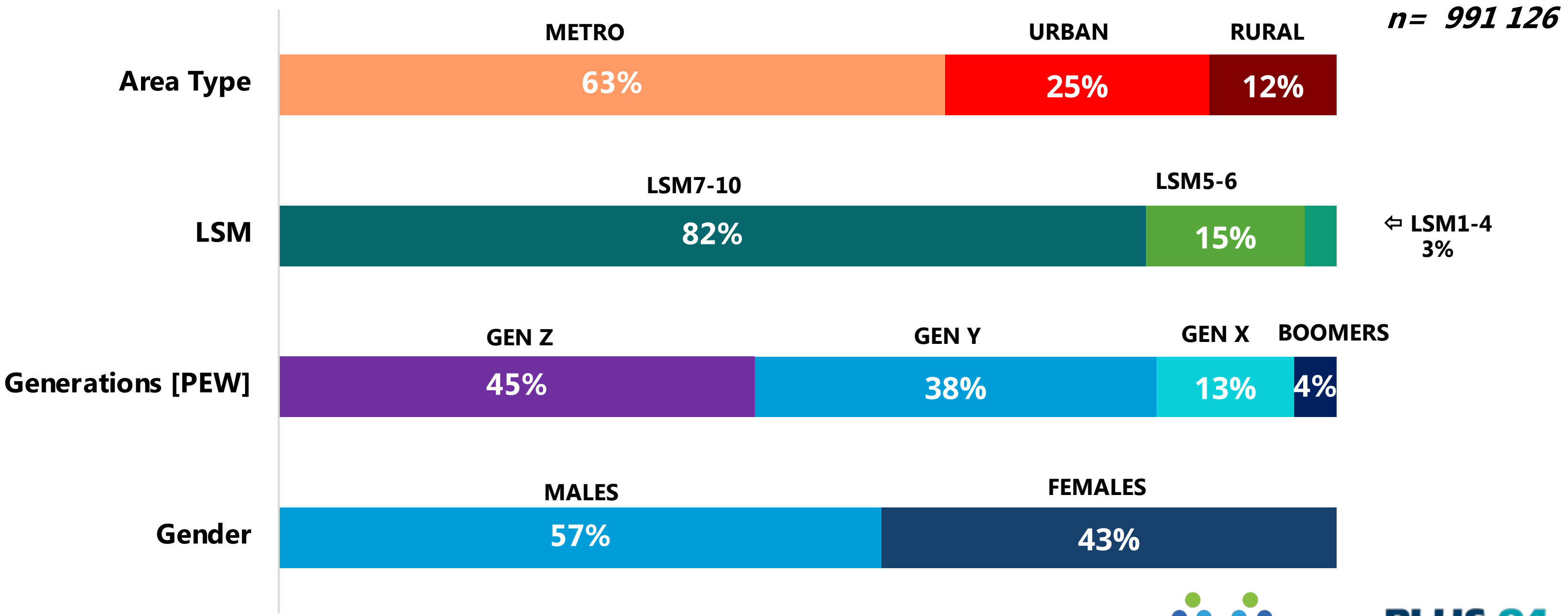
606K people regularly go to the **Cinema** once every 2 to 3 months.

TOP 4 Cinema Chains Visited

- Ster-Kinekor: **985K** Visited most often
- NuMetro: **721K** Visited most often
- Movies@: **171K** Visited most often
- CineCentre: **103K** Visited most often

R437,74 average cinema outing cost.





Jul'22- Jun'23 Pop 15+: 43 592 223

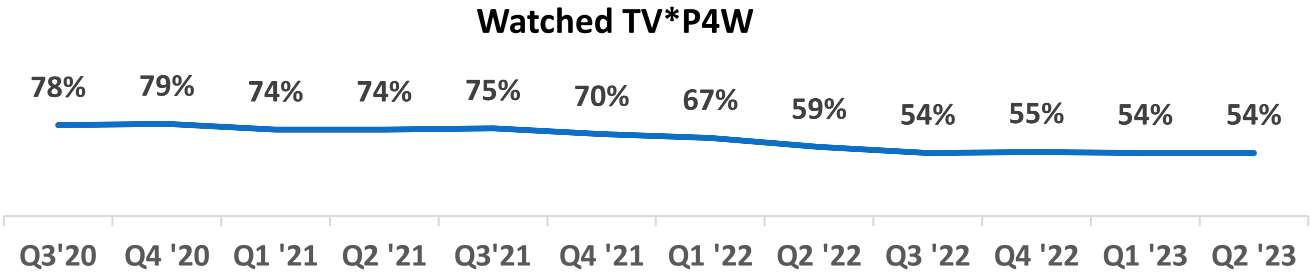
Cinema Penetration* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on n = 991 126

TV Landscape (P4W)

4.9M people spend more than 20 hours per week watching TV.

TOP 4 TV Channels Viewership

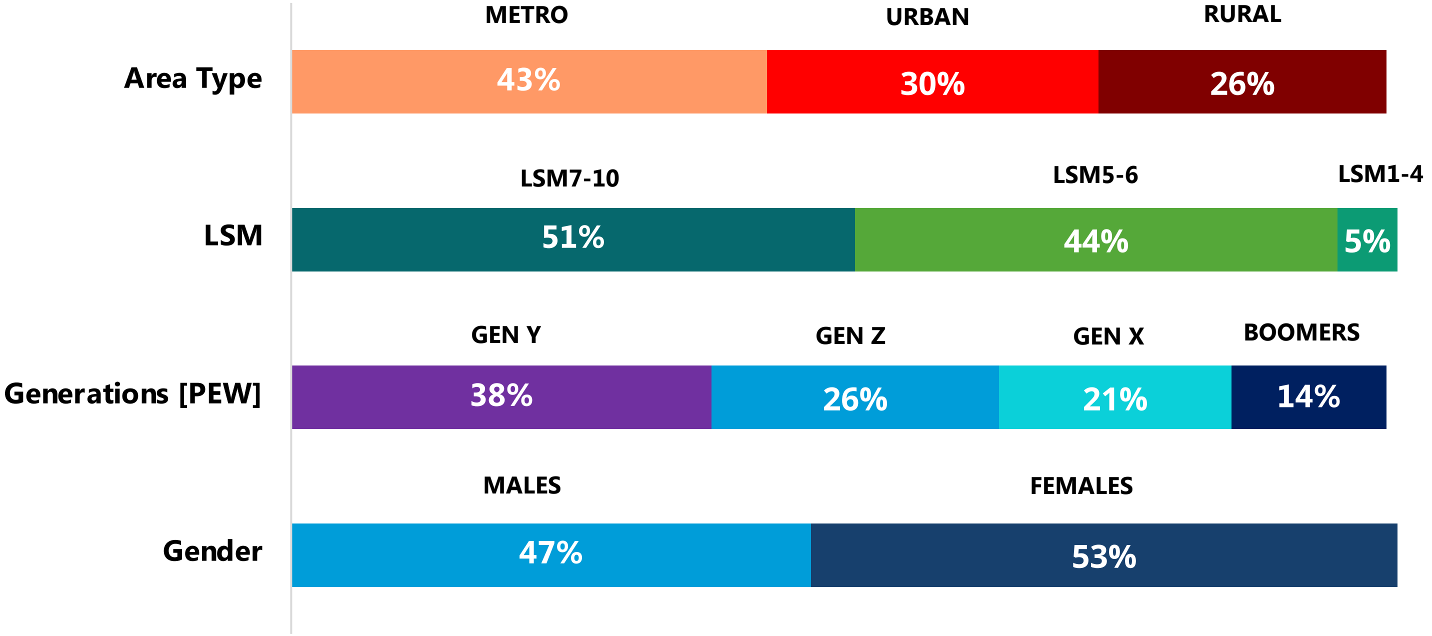
- SABC 1 — **8.4M** Watched P4W
- e — **7.3M** Watched P4W
- SABC 2 — **5.9M** Watched P4W
- SABC 3 — **3.9M** Watched P4W



Television (P4W) Penetration 54%

DSTV (P4W) Penetration 46%

n=23 671 855



Jul'22- Jun'23 Pop 15+: 43 592 223

TV Penetration* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on n = 23 671 855.

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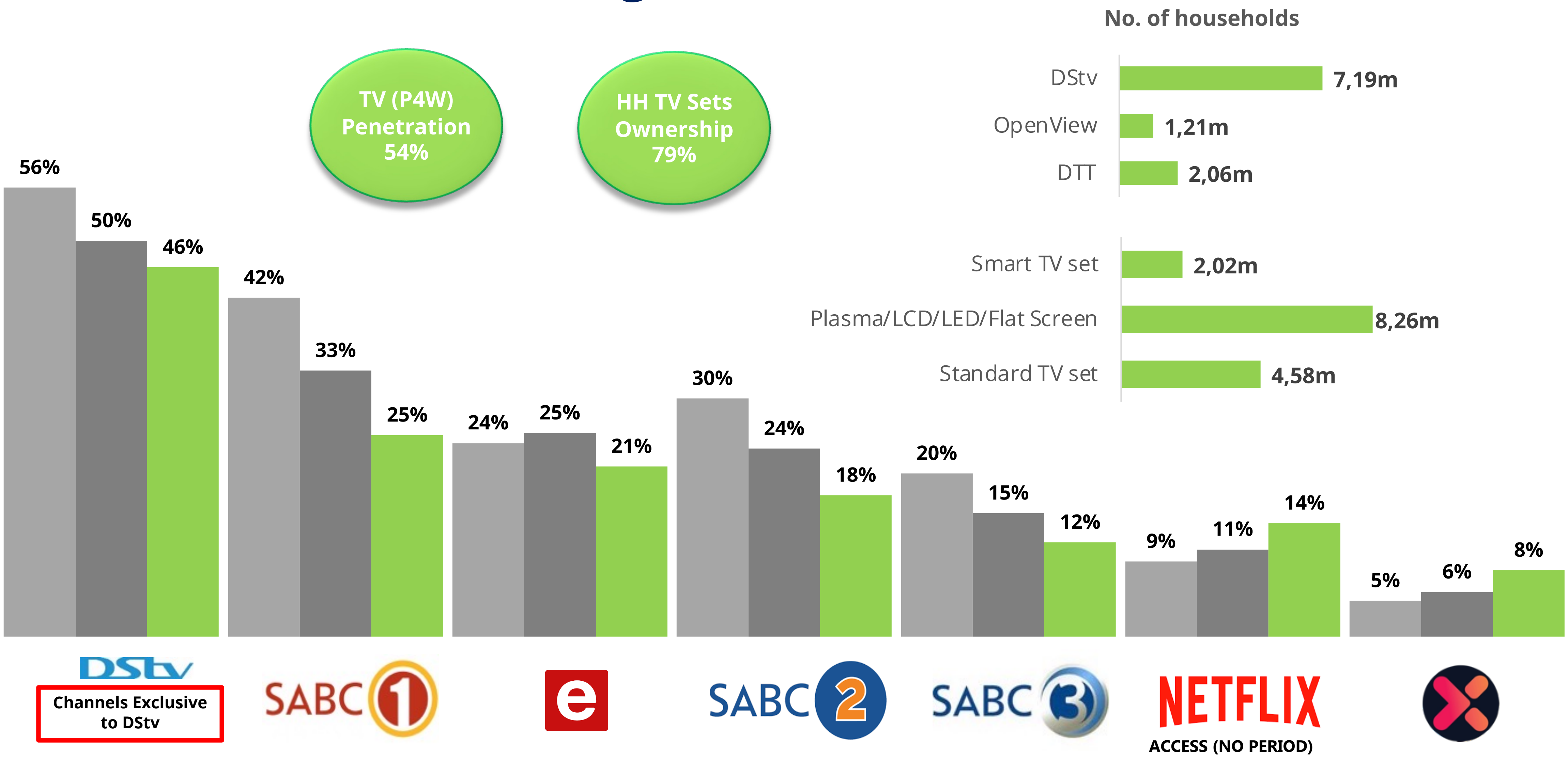
TV Channels & Streaming: P4W YoY

TV (P4W) Penetration 54%

HH TV Sets Ownership 79%



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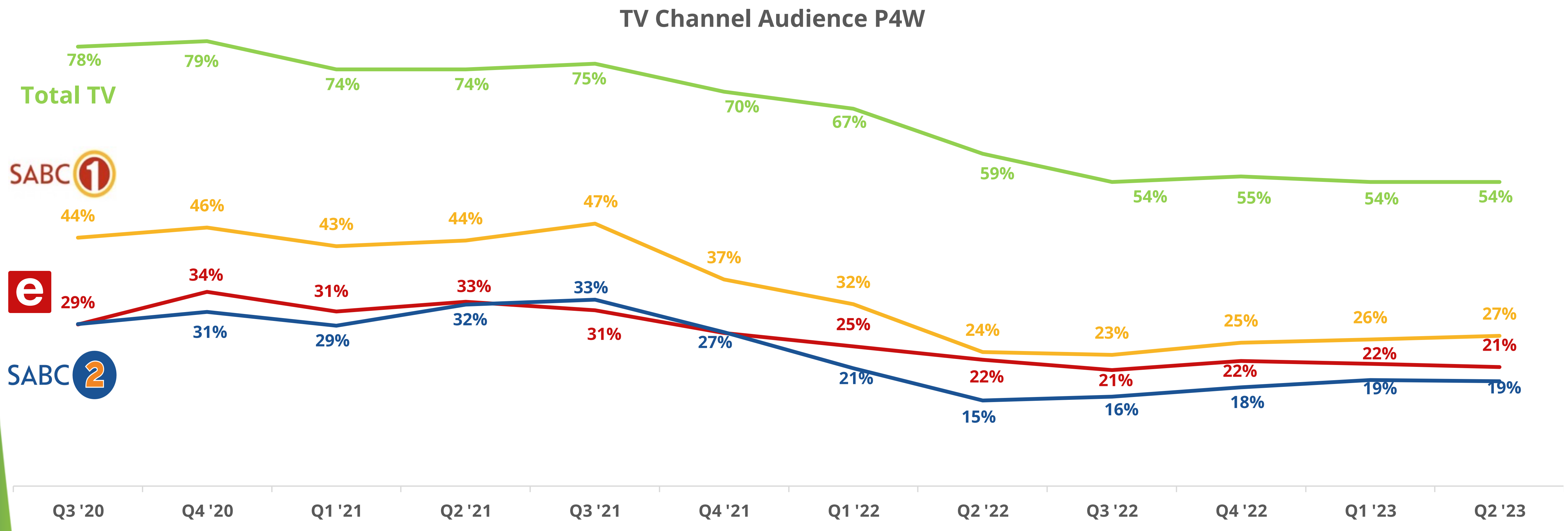
TV Channel Penetration: % QoQ



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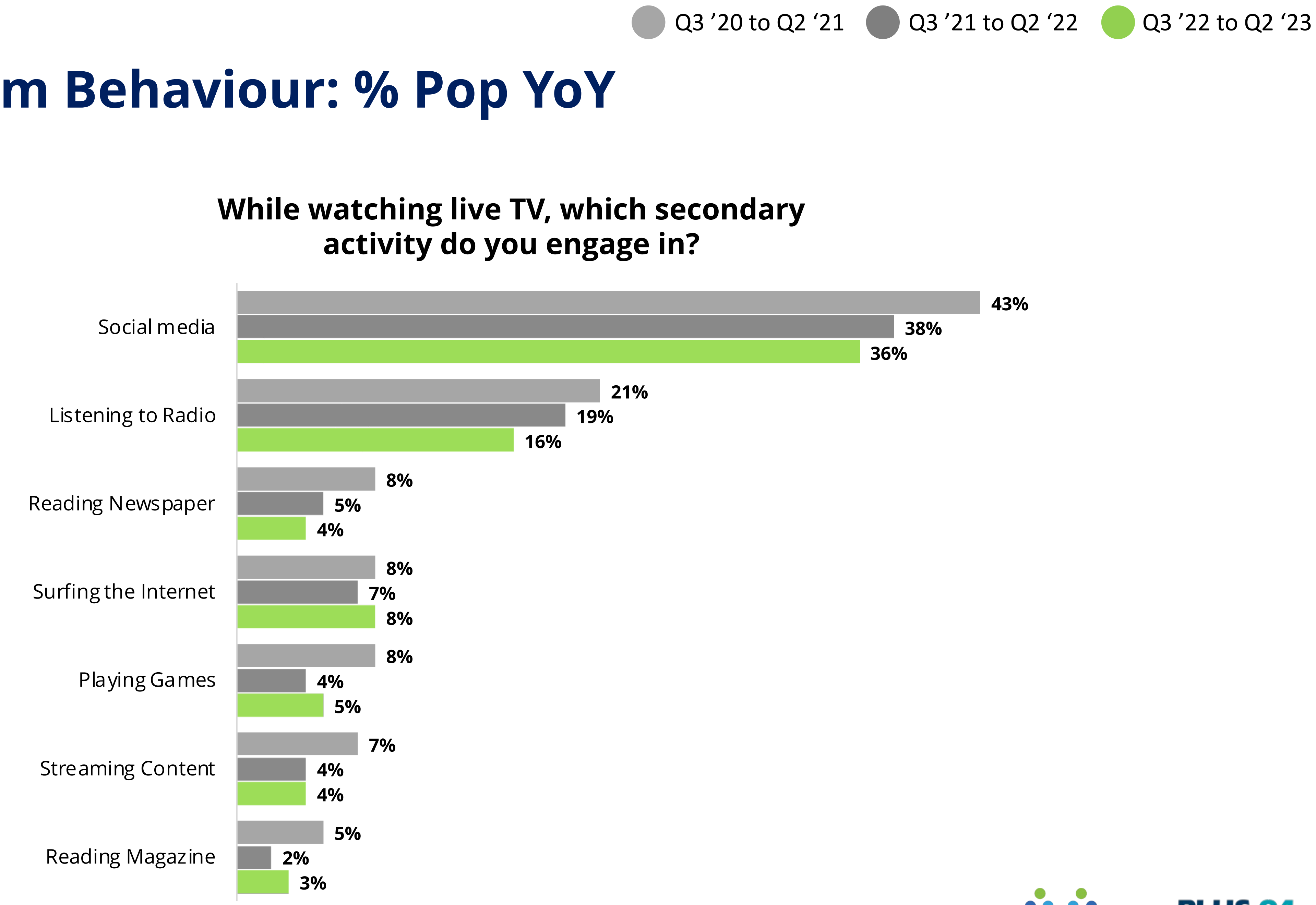
Multiplatform Behaviour: % Pop YoY



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Radio Landscape (P4W)

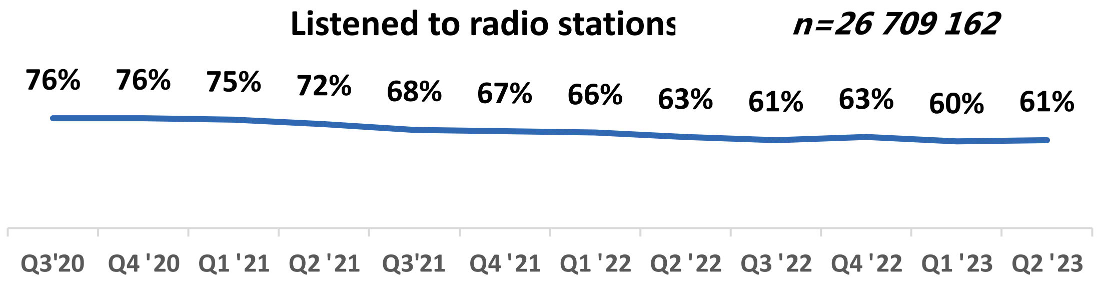
4.4M spend **more than 20 hours** per week listening to the radio

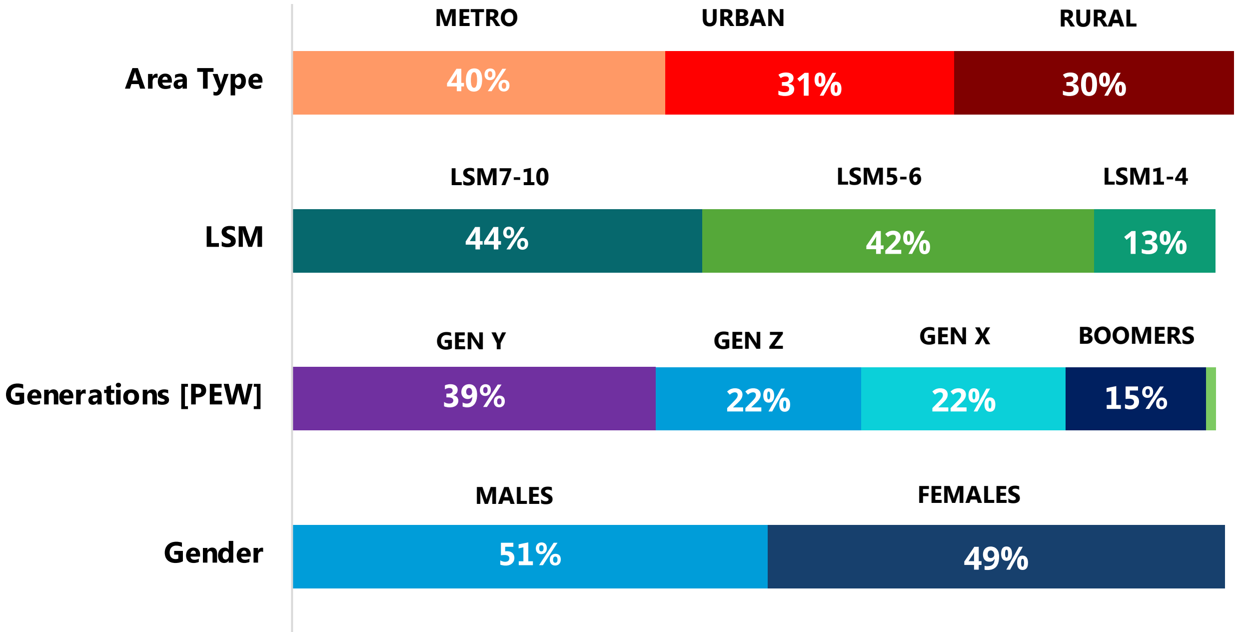
819K spend **more than 20 hours** per week listening to a podcast

25M listened to **Commercial Stations** (P4W)

4M listened to **Community Stations** (P4W)

97K listened to **Internet radio** stations (P4W)





⇦ PRE-BOOMERS 1%

Radio (P4W) Penetration 61%

Audio streaming (Ave. Week) Penetration 7%

Podcast (Ave, Week) Penetration 4%

P4W: TOP 5 Radio Stations →

	P4W
ukhozi fm (luhamba phambili!)	5.4M
uMhlobo Wenene fm	3.1M
METRO FM	2.7M
LESEDI FM	2.7M
Motsweding FM 87.9 - 107.9	2.2M

Jul'22- Jun'23 Pop 15+: 43 592 223

Radio Penetration* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on n = 26 709 162.

Q3 ’20 to Q2 ‘21 | Q3 ’21 to Q2 ‘22 | Q3 ’22 to Q2 ‘23

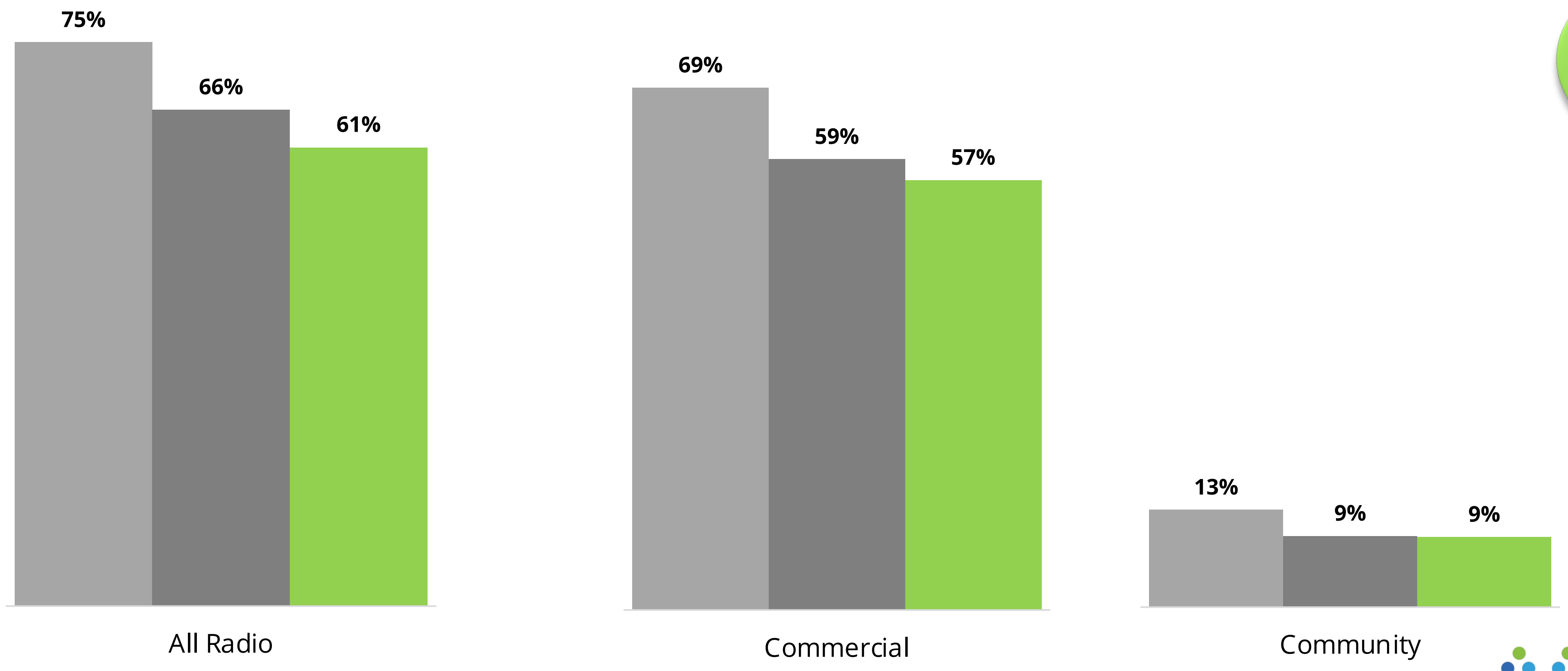
Radio Listenership: % Pop YoY (P4W)

HH Radio Sets Ownership 40%

Radio (P4W) Listenership 61%

Overall radio: Past 4 weeks

Radio Category: Past 4 weeks



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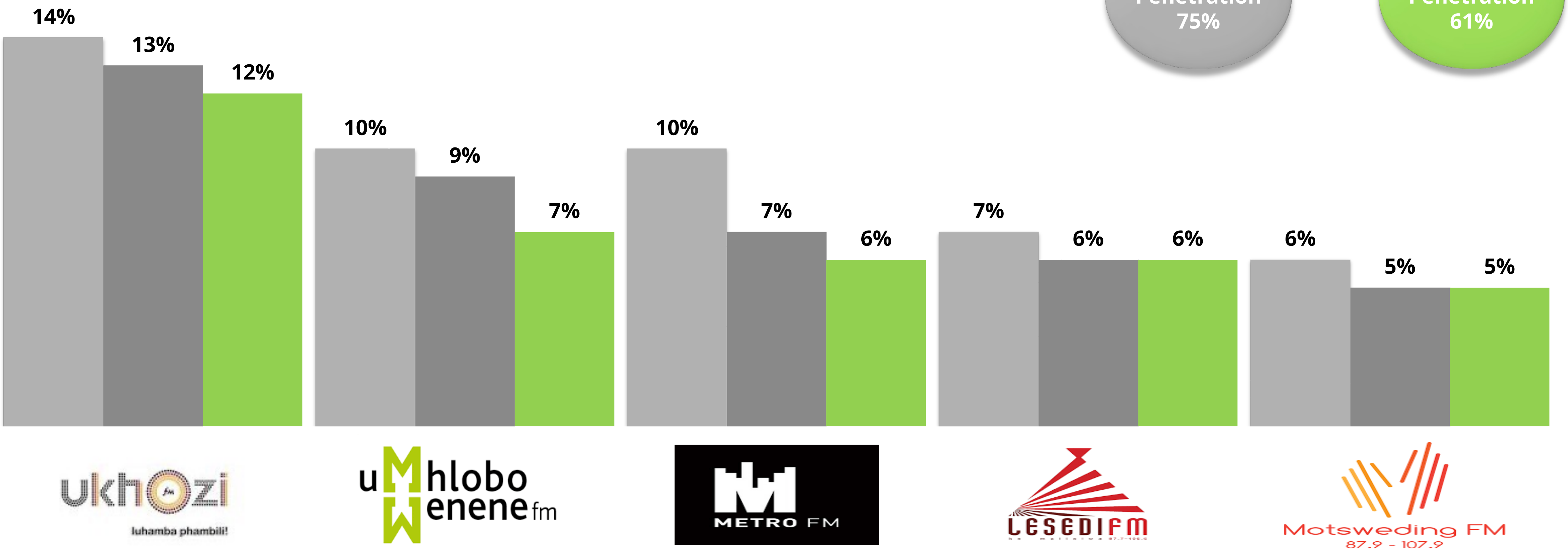
Top 5 Radio Stations P4W: % Pop YoY

Radio (P4W) Penetration 66%

Radio (P4W) Penetration 75%

Radio (P4W) Penetration 61%



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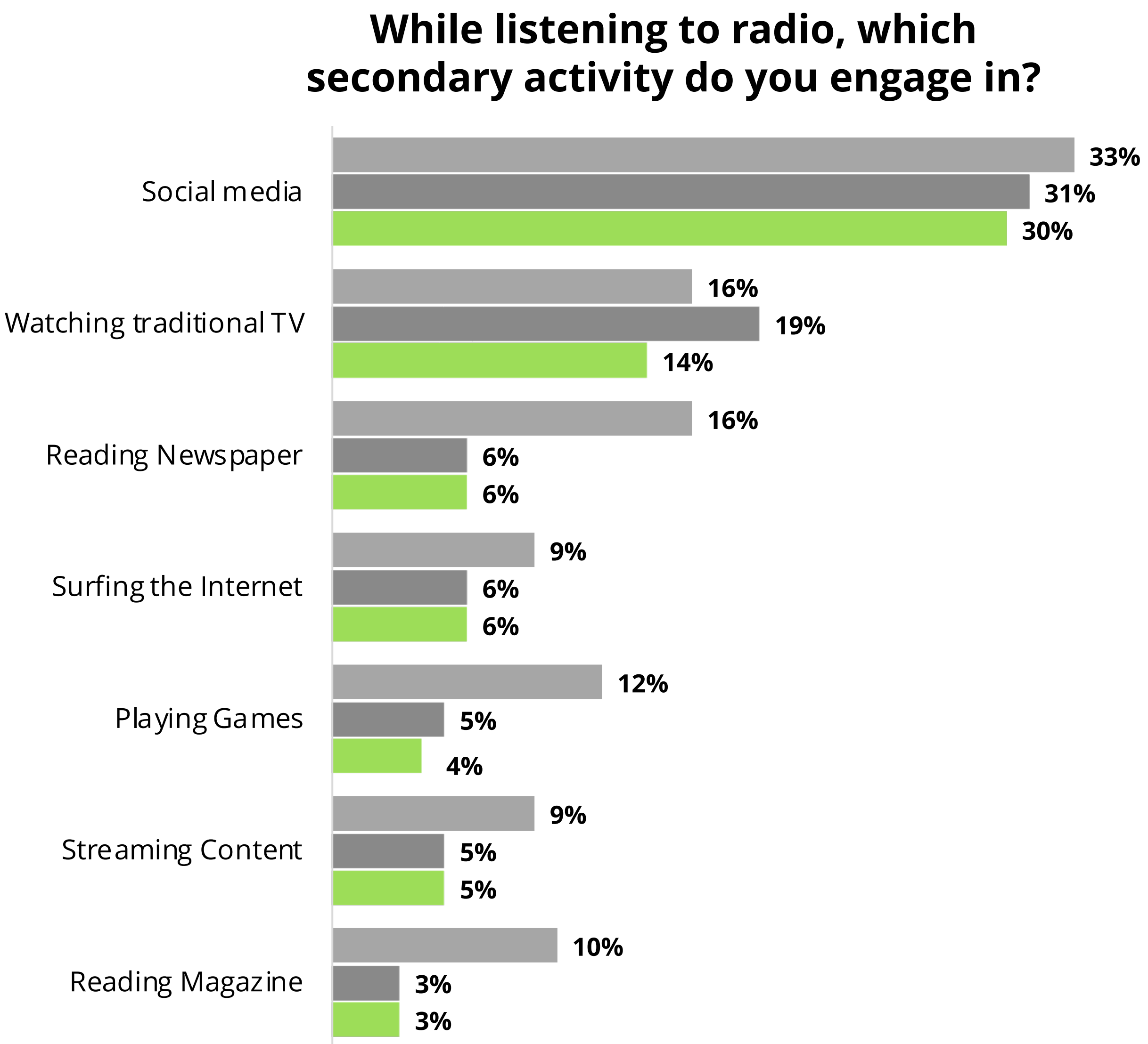
Q3 ’20 to Q2 ‘21 Q3 ’21 to Q2 ‘22 Q3 ’22 to Q2 ‘23

Multiplatform Behaviour: % Pop YoY



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Magazine Landscape (P3M)

5.3M people **read** magazines in the past 3 months.

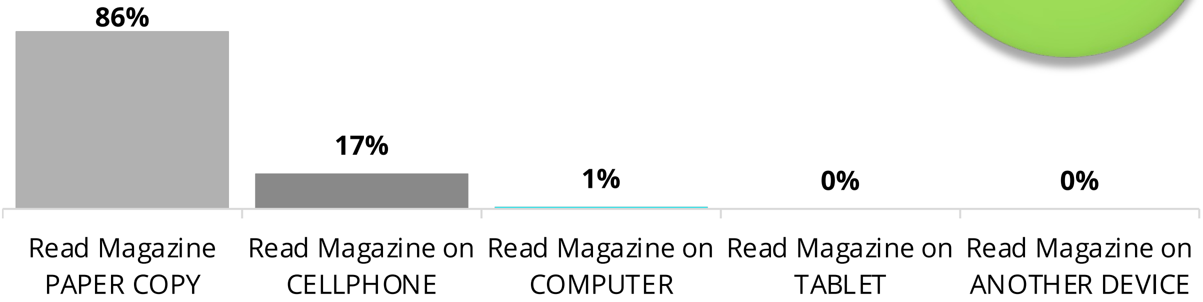
Magazine (AIR) 11%

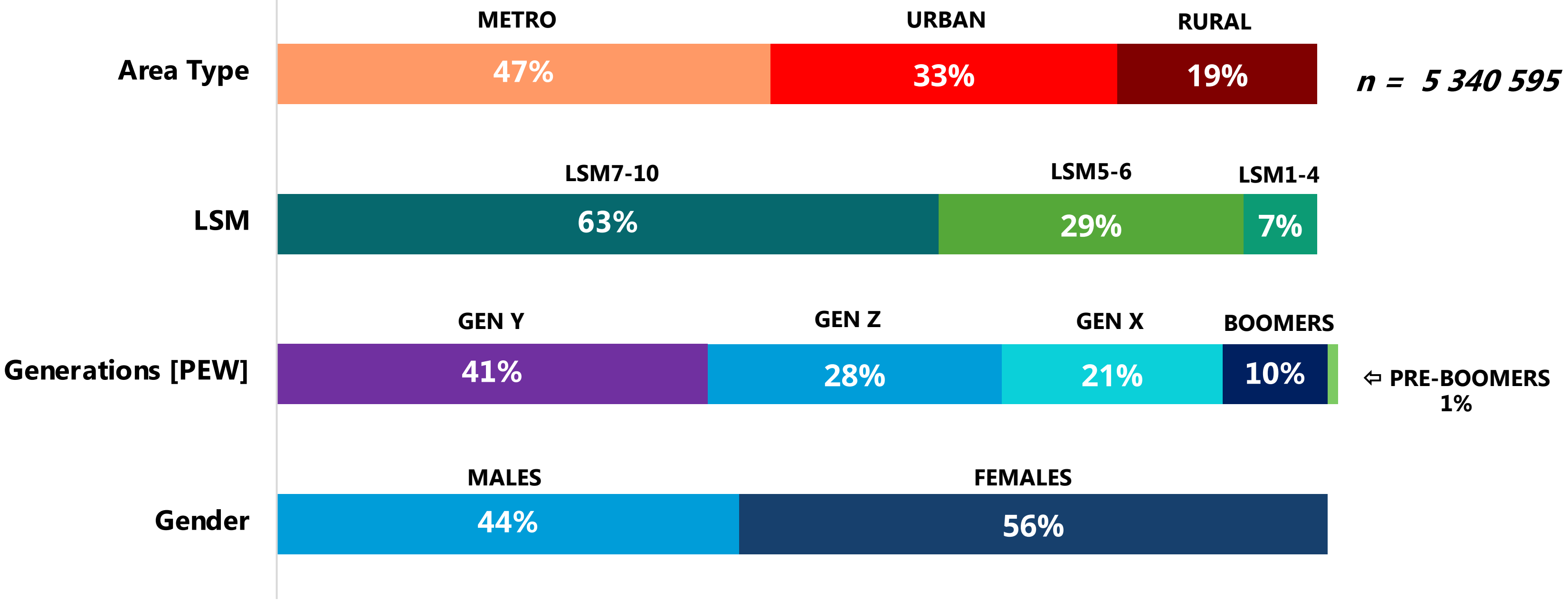
Magazine (P3M) Penetration 12%

Store Magazine (P3M) Penetration 16%

Top 4 Magazines

DRUM	1.3M Read P3M
HUIS genoot	772K Read P3M
YOU	617K Read P3M
Kuier	363K Read P3M





n = 5 340 595

Jul'22- Jun'23 Pop 15+: 43 592 223

Magazine Penetration* - Percentages displayed on the graph at the top are based on the total population.
The demographic profile results are based on n = 5 340 595.

Newspaper Landscape (P3M)

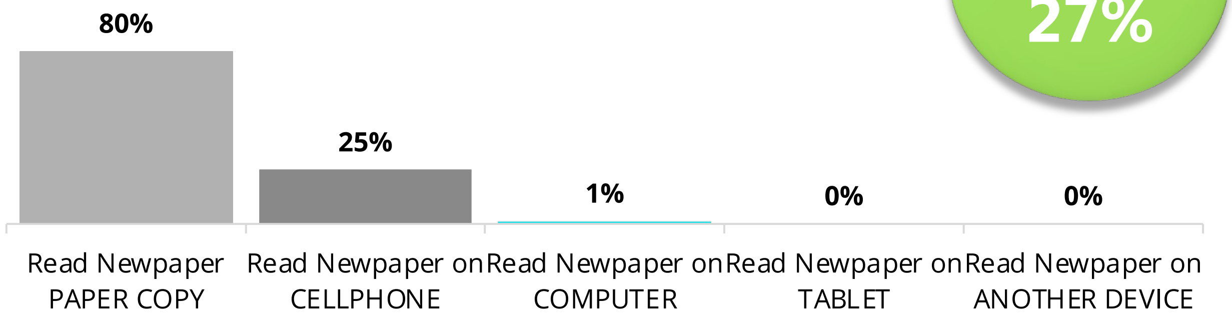
Newspaper (AIR) 27%

Newspaper (P3M) Penetration 34%

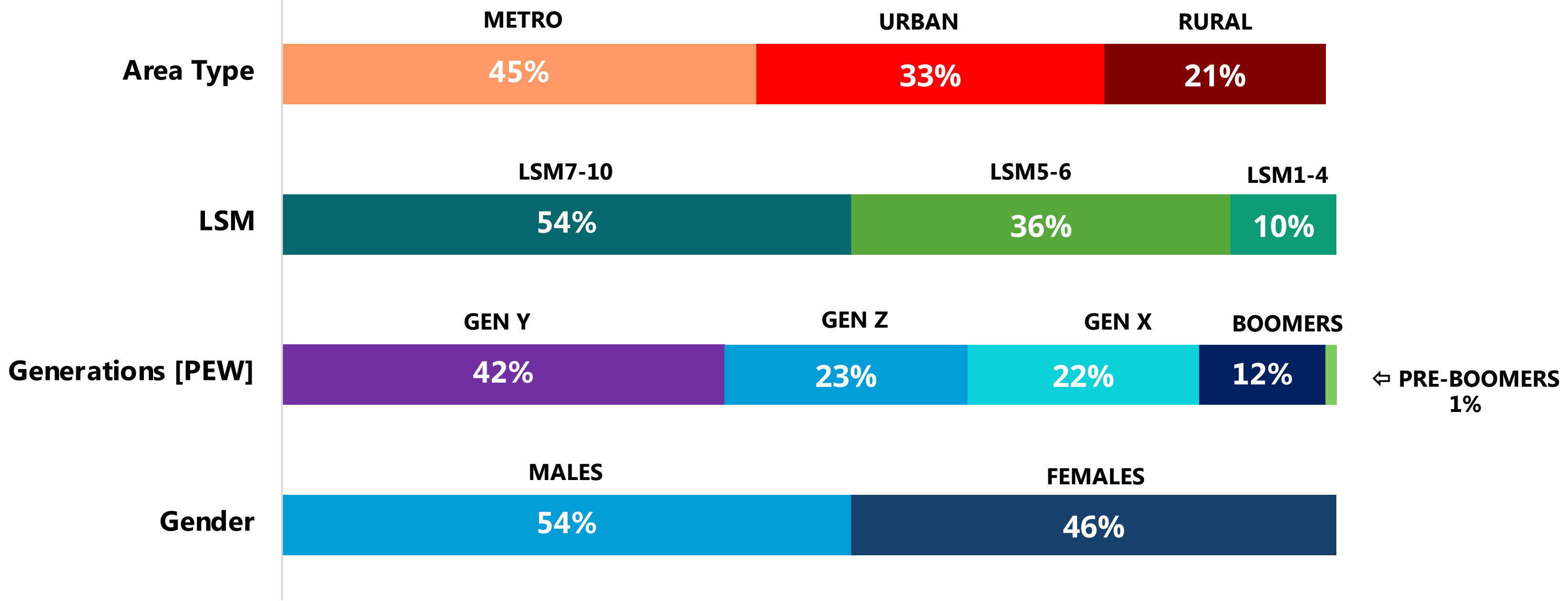
15M people read Newspapers in the past 3 months.

Top 4 Newspapers

Daily Sun	3.6M Read P3M
Isolezwe	2.3M Read P3M
Sowetan	866K Read P3M
Daily News	687K Read P3M



n = 14 739 645



Jul'22- Jun'23 Pop 15+: 43 592 223

Newspaper Penetration* - Percentages displayed on the graph at the top are based on the total population.
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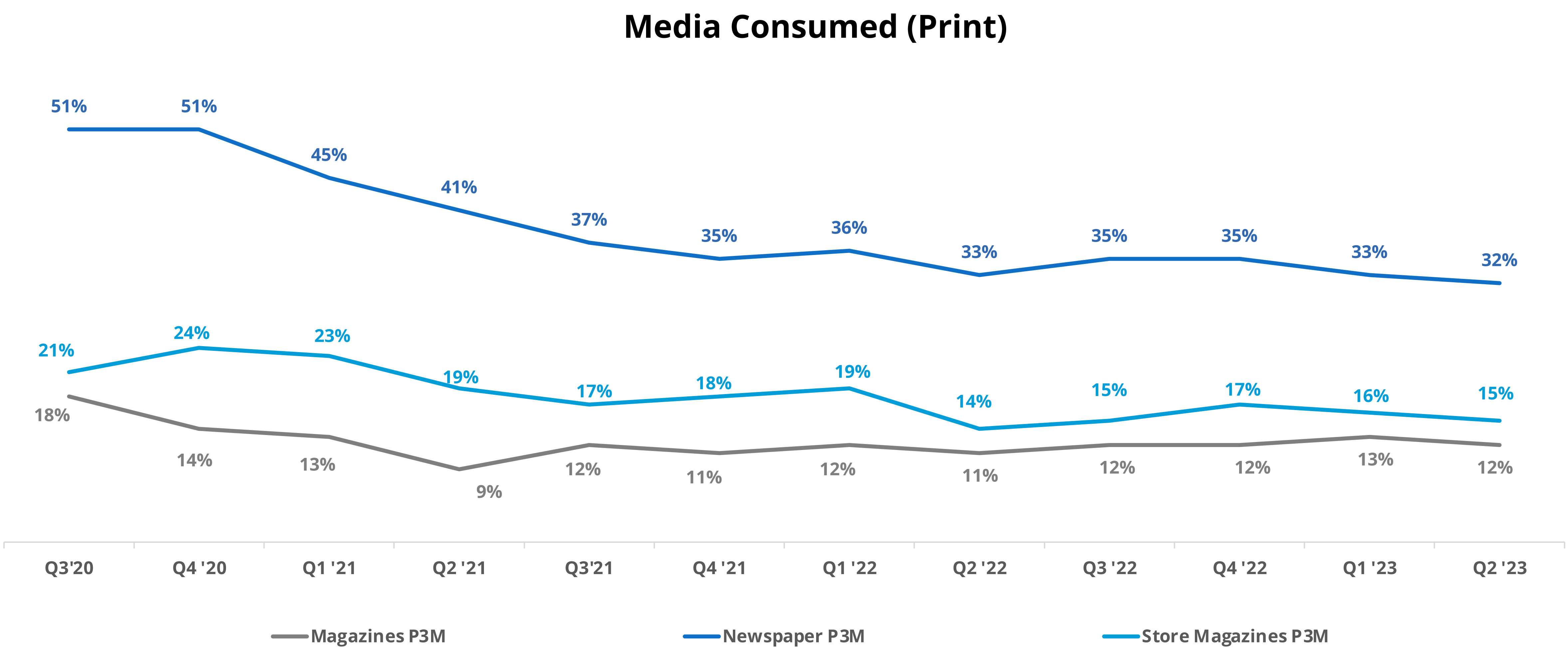
Print Penetration Shifts: % QoQ



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Streaming Landscape

8.2M people have access to on-demand streaming services.

Top 3 Streaming services

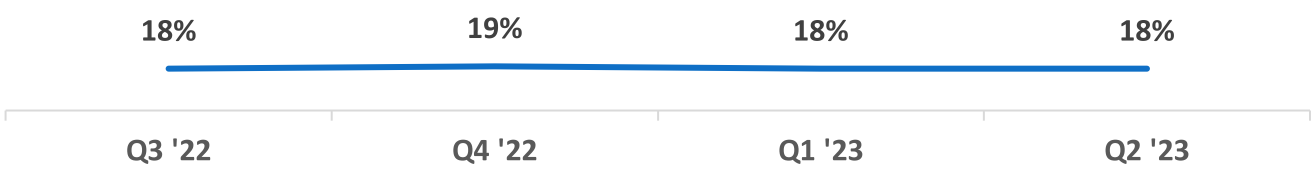
YouTube — Access to YouTube **9.0M**

NETFLIX — Access to Netflix **6.2M**

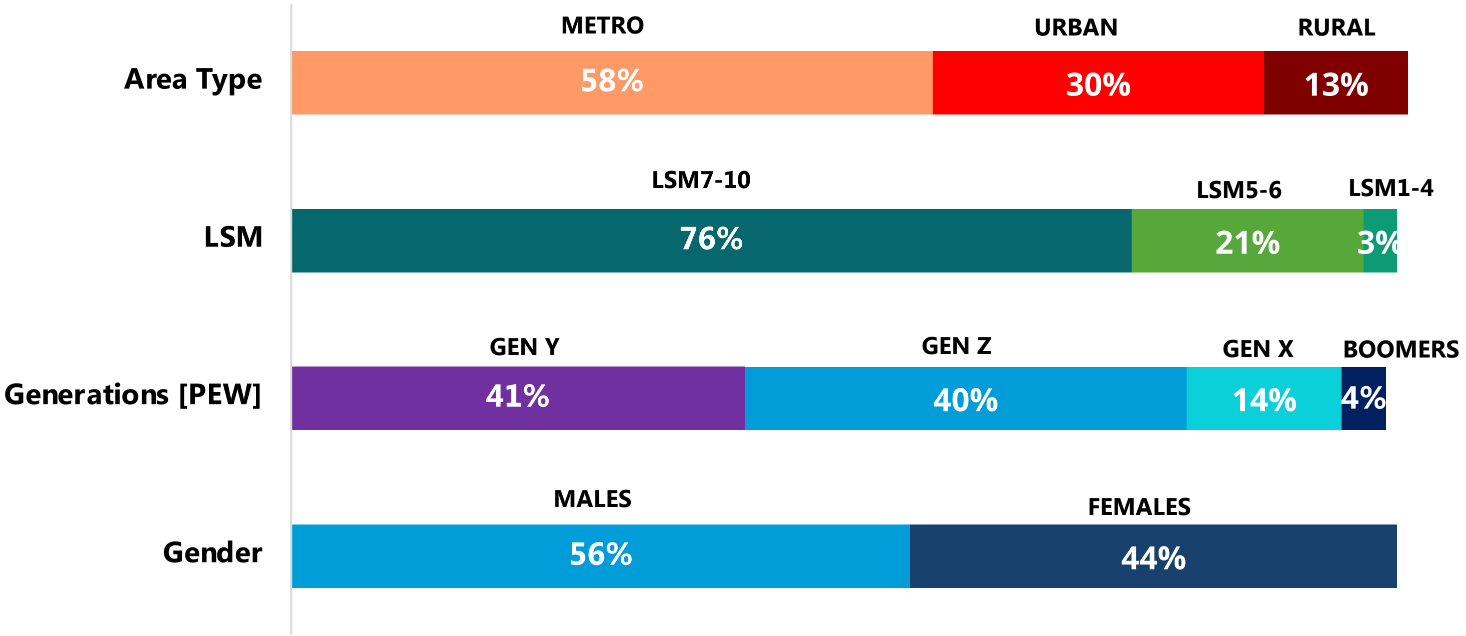
Access to Showmax **3.6M**

Streaming Penetration **19%**

On-demand streaming



n = 8 165 970



Jul'22- Jun'23 Pop 15+: 43 592 223

On-demand streaming Penetration* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on n = 8 165 970.

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Social Media (P4W)

13M South Africans spend **more than 20 hours** per week on social media.

TikTok

Fastest growing in past 3 years

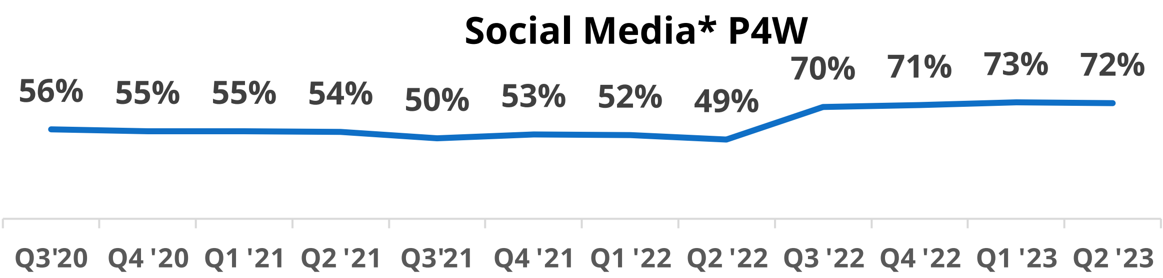
GREW BY 531%

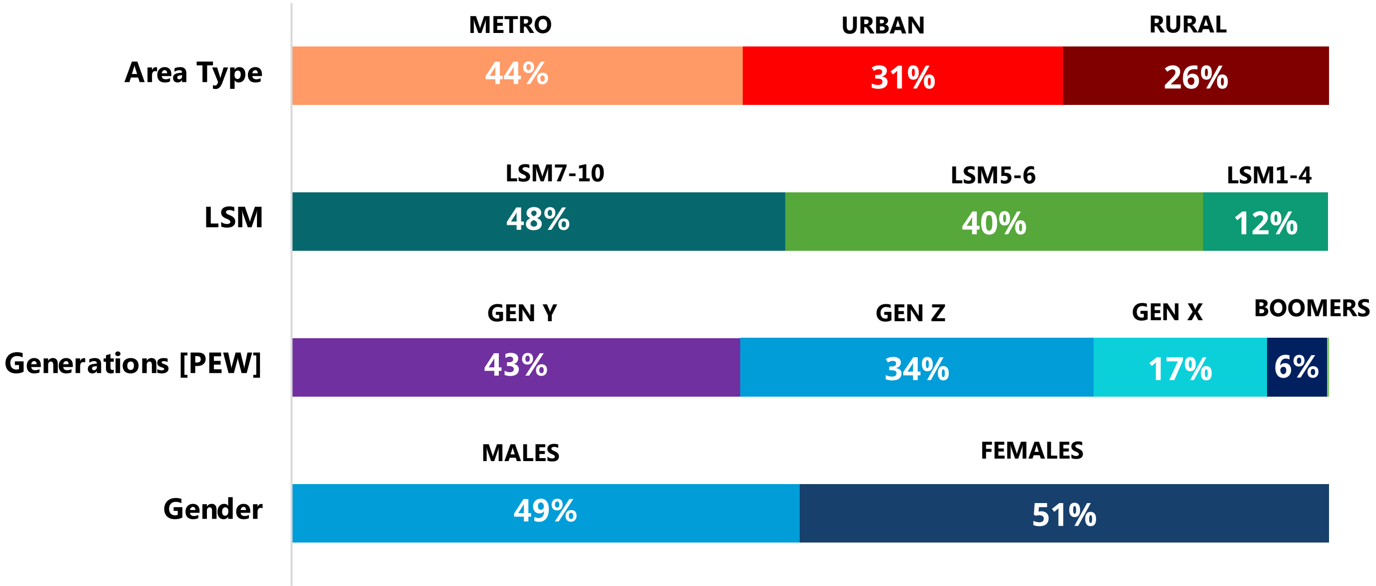
Traditional search engines DON'T ALWAYS DO THE TRICK.

6M South Africans used TikTok as a search engine.

n=31 166 591

Social Media (P4W) Penetration **71%**





P4W: TOP 3 SOCIAL MEDIA PLATFORMS →

WhatsApp 27.8M

facebook 24.6M

TikTok 10M

Jul'22- Jun'23 Pop 15+: 43 592 223

Social Media* - Percentages displayed on the graph at the top are based on the total population.
The demographic profile results are based on n = 31 166 591 .

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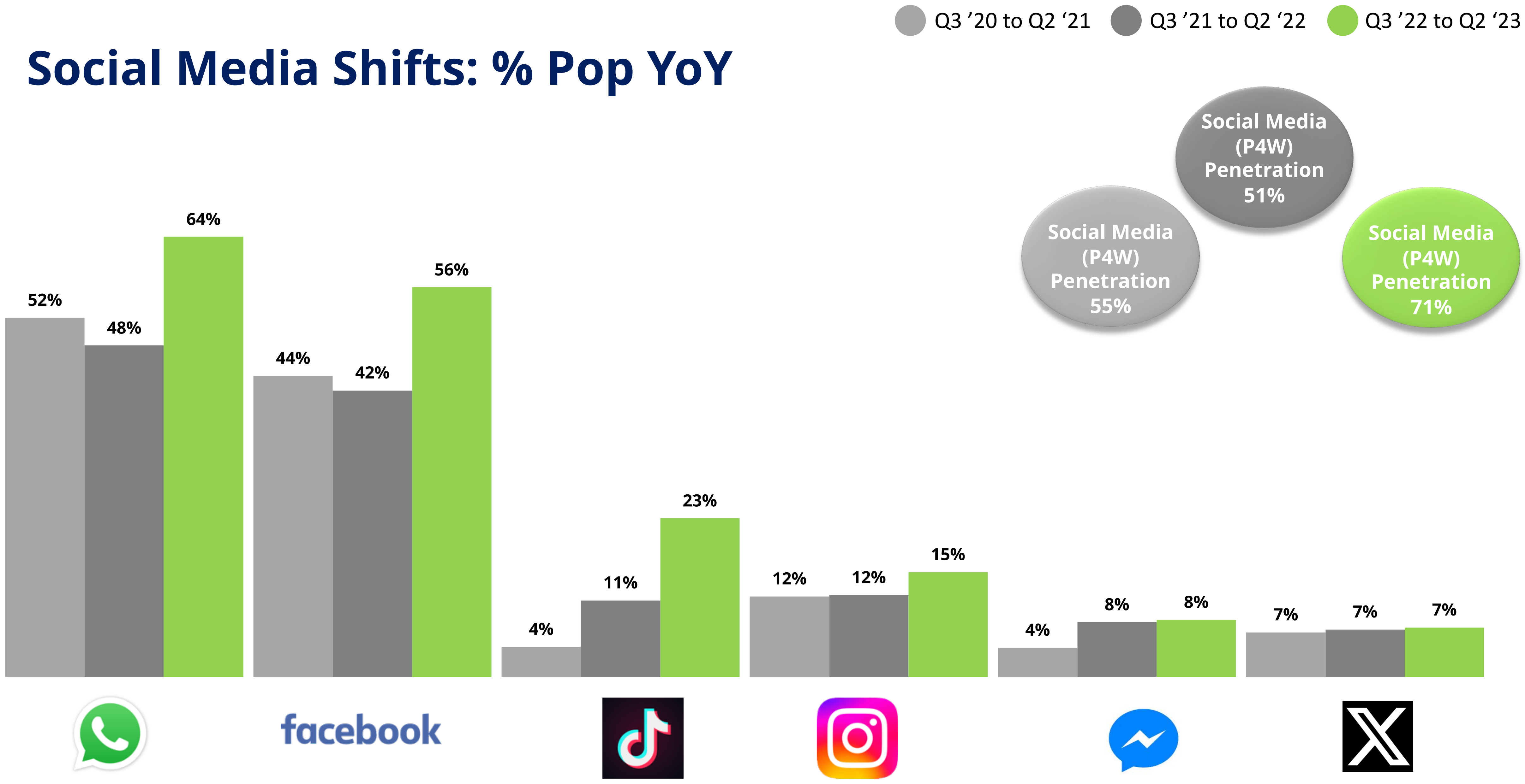
Social Media Shifts: % Pop YoY



*Year 3 data reflects significant shifts attributed to increased exposure of questionnaire questions to a broader audience.

Jul '20 - Jun '21 Pop 15+: 43 099 703

Jul '21- Jun '22 Pop 15+: 43 592 223

Jul '22- Jun '23 Pop 15+: 43 592 223

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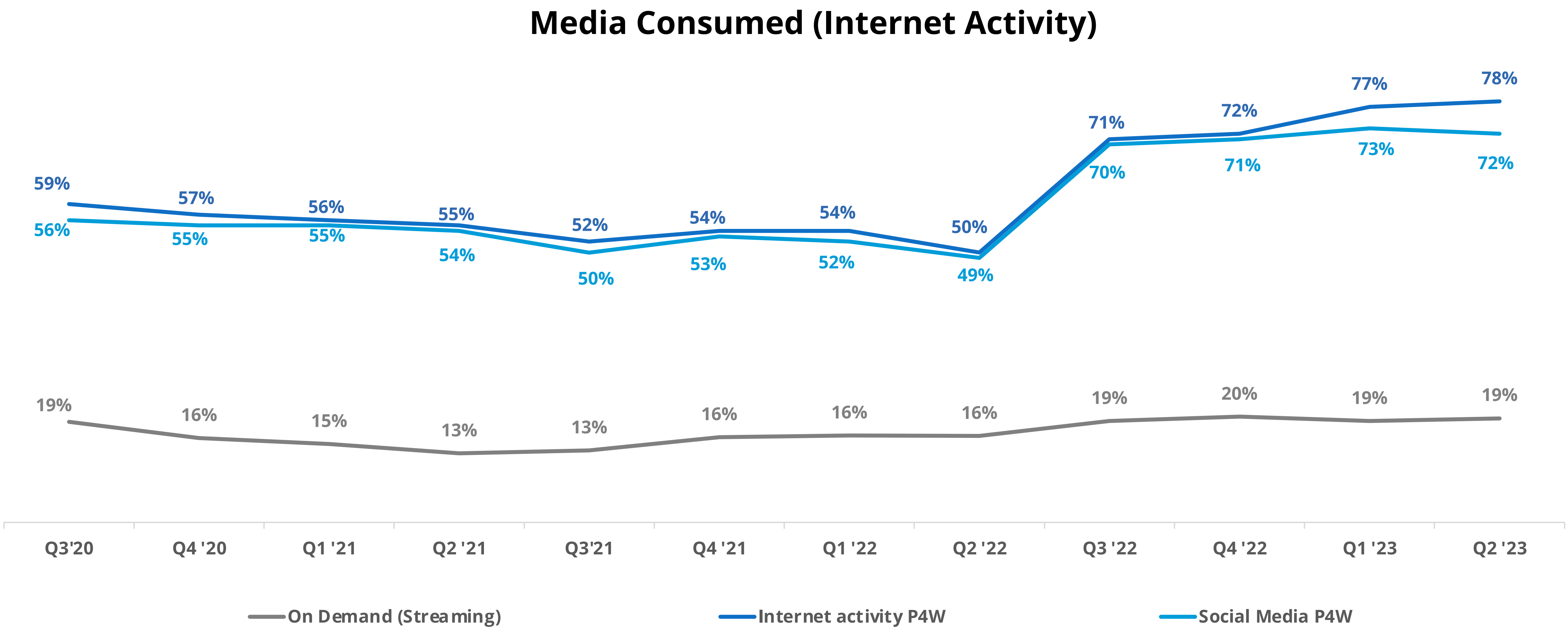
Media Penetration Shifts: % Pop YoY



*Q2 2022-Q3 2023 data reflects significant shifts attributed to increased exposure of questionnaire questions to a broader audience.

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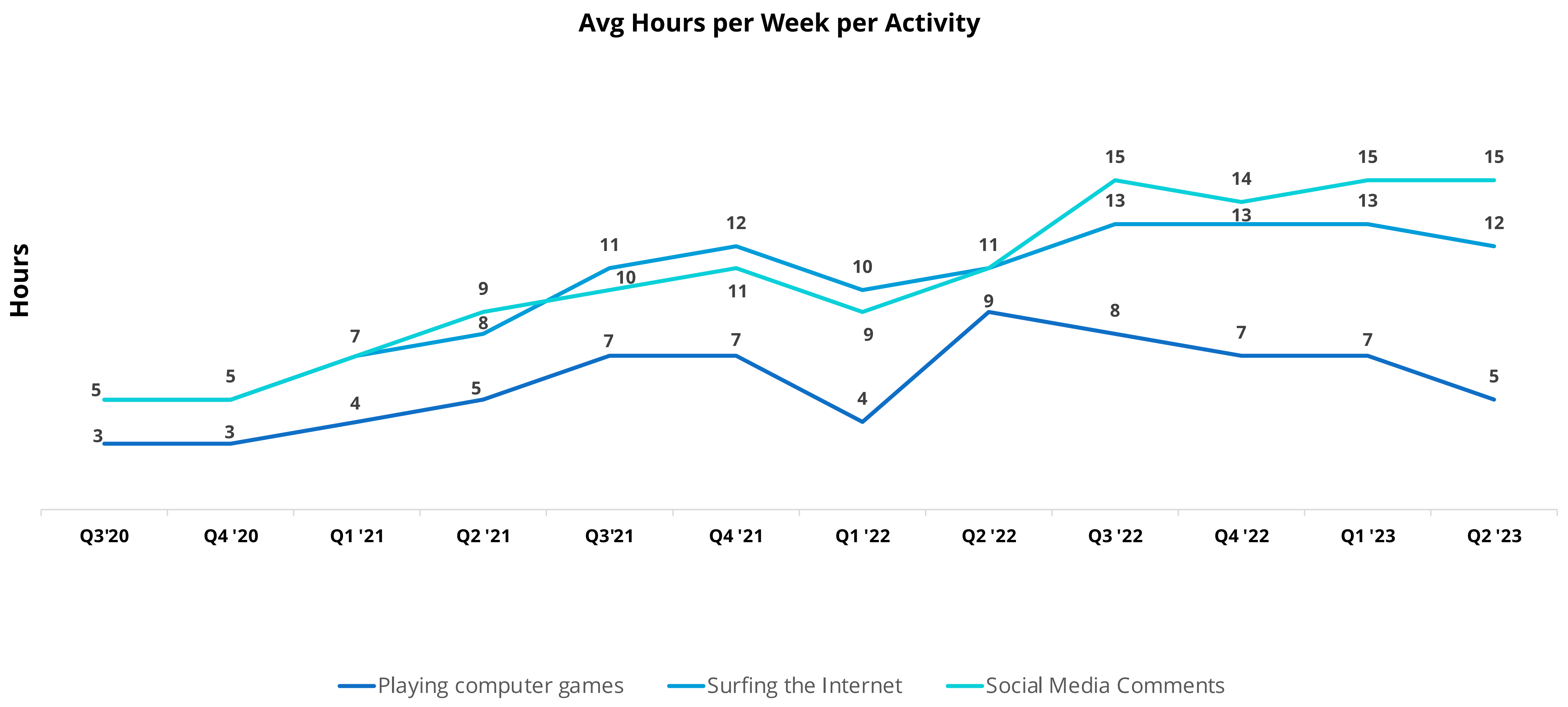
Digital Behaviour: QoQ



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Jul '21- Jun '22 Pop 15+: 43 592 223

Jul '22- Jun '23 Pop 15+: 43 592 223

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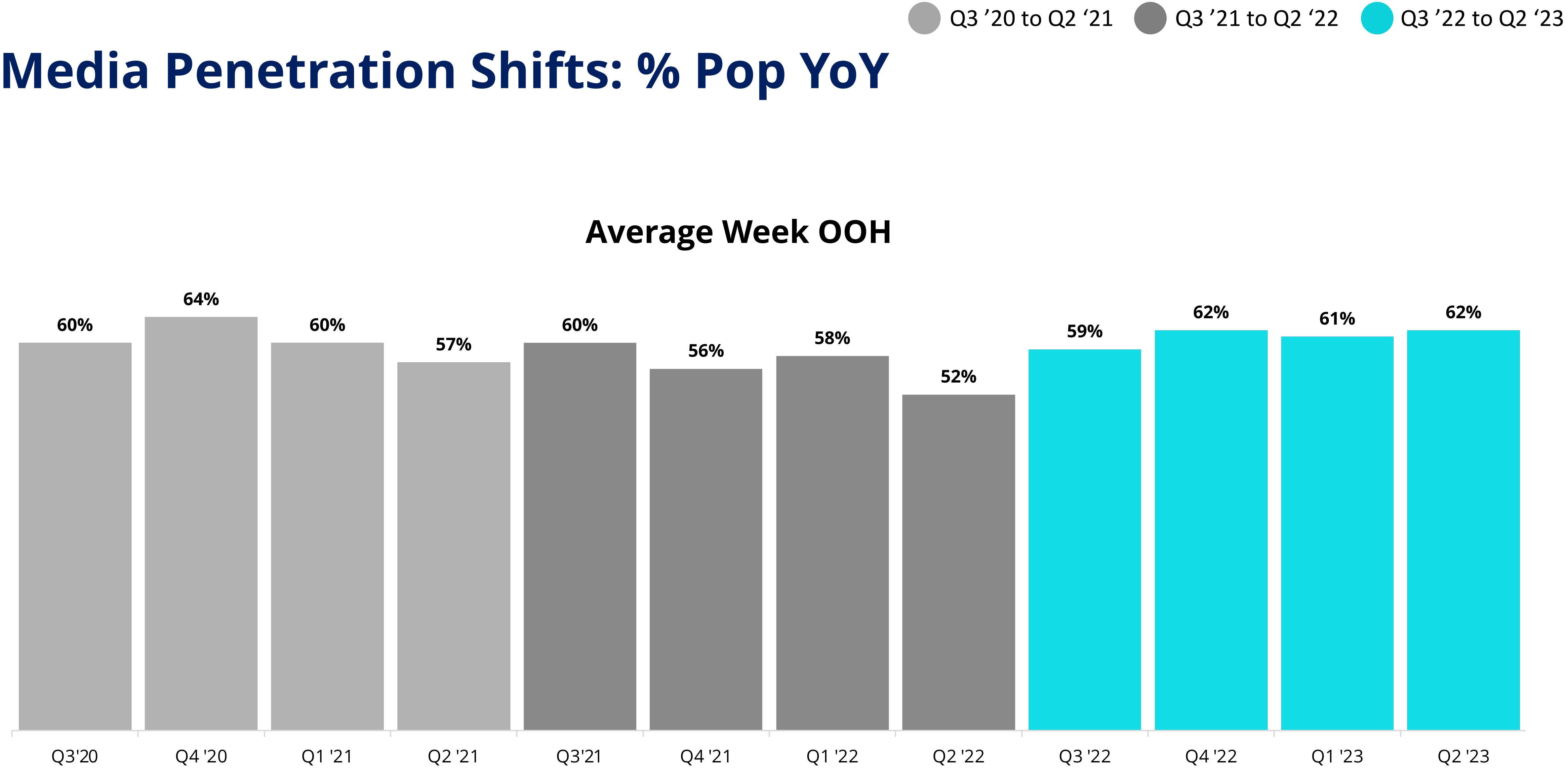
Media Penetration Shifts: % Pop YoY



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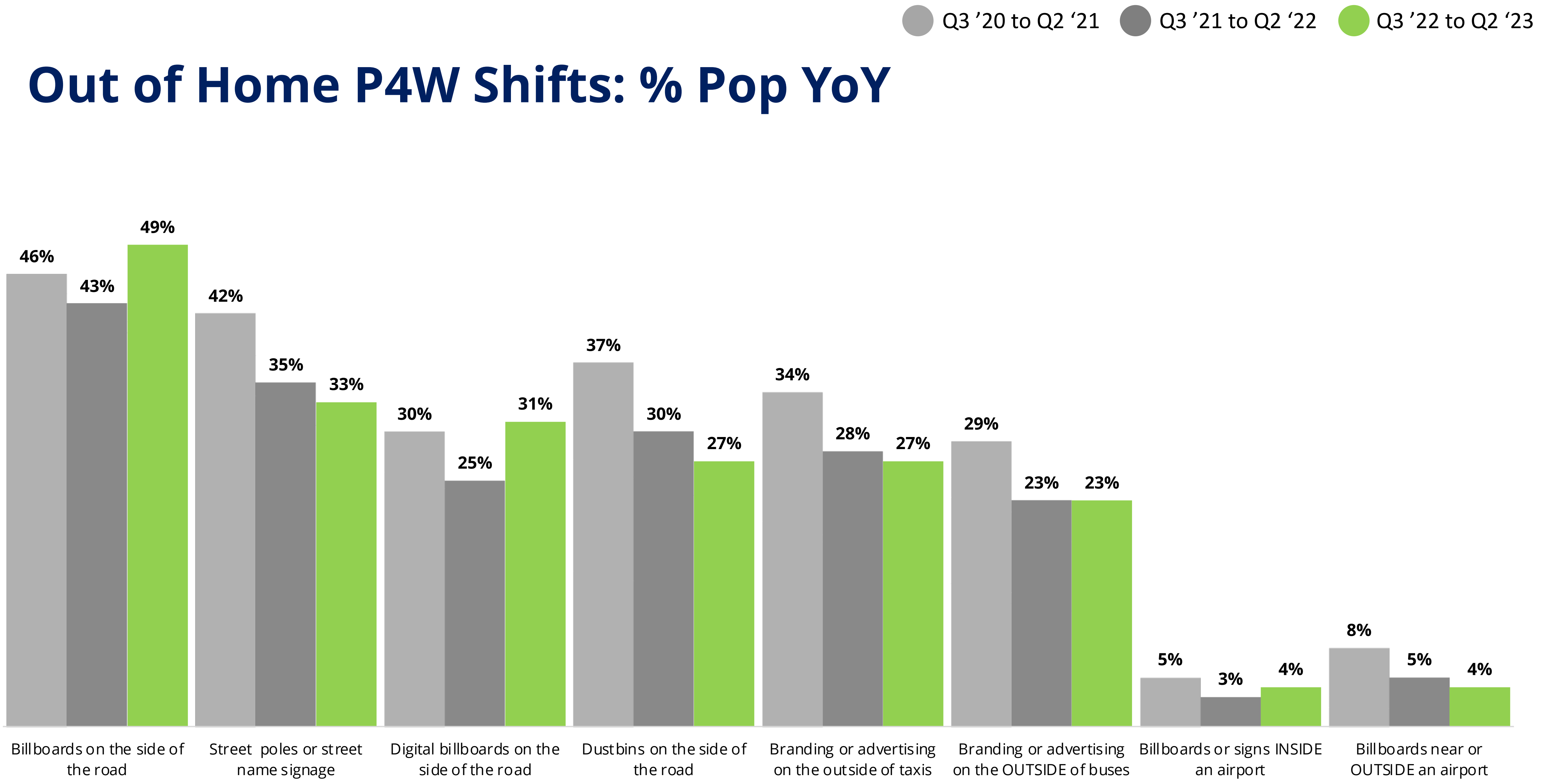
Out of Home P4W Shifts: % Pop YoY



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Financial Services

Financial Services and Insurance Cover

66% have a bank account excluding the SASSA accounts

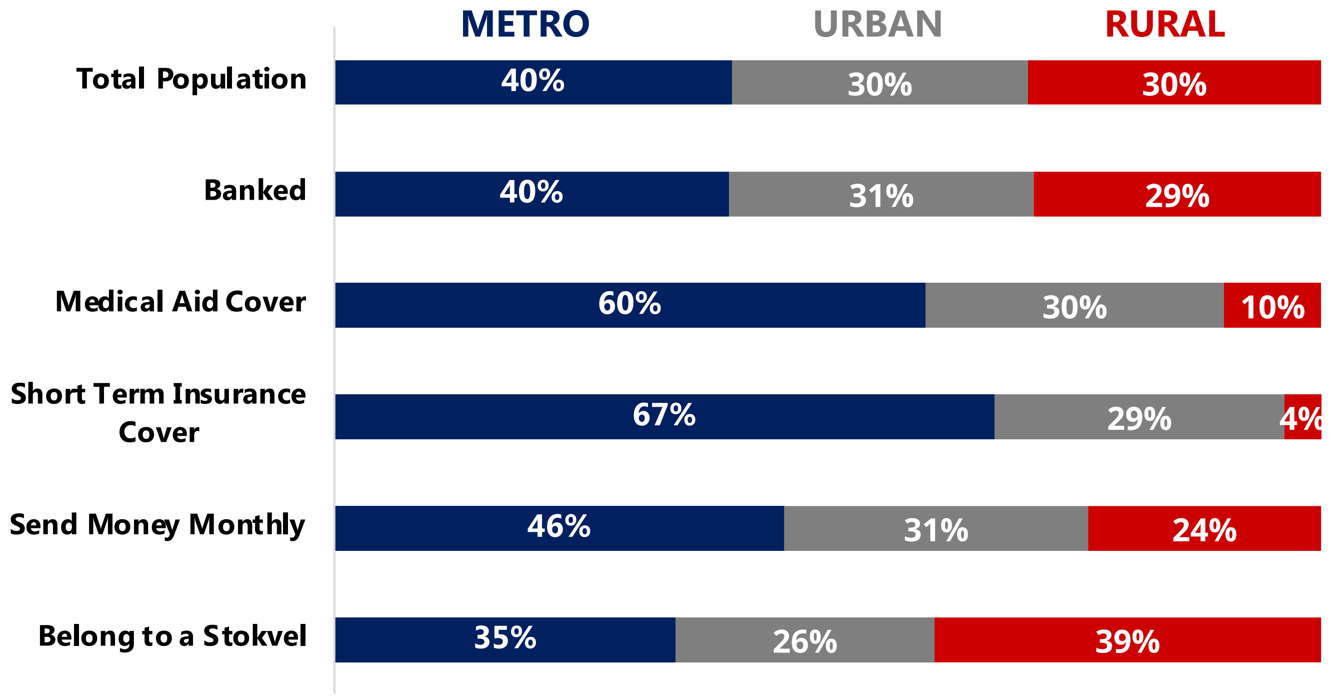
10% have medical aid cover

37% are insured

35% have funeral insurance or policy

3.7% have short term insurance.

Distribution by Area



22.5% transfer or send money to family or friends monthly. On average **R1025** is sent.

8.5% belong to a stokvel.

Jul'22- Jun'23 Pop 15+: 43 592 223

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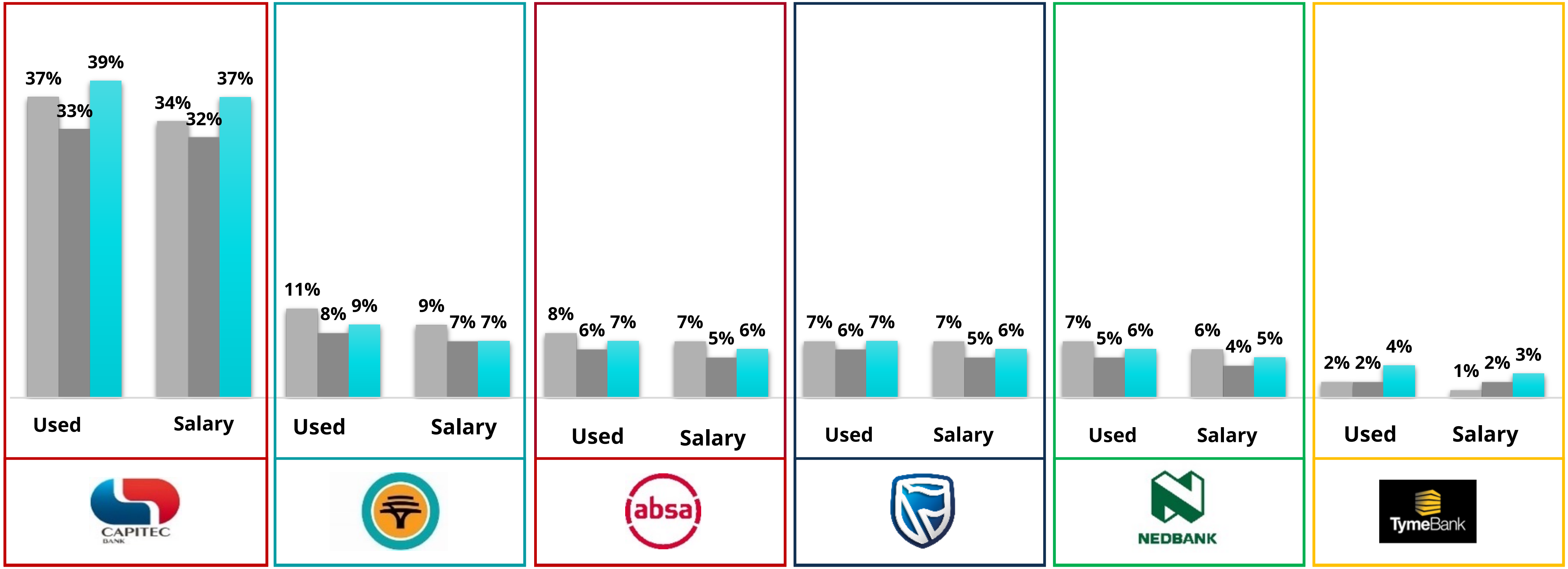
Banks YoY

Q3 ’20 to Q2 ‘21 Q3 ’21 to Q2 ‘22 Q3 ’22 to Q2 ‘23

Bank Usage and Salary Deposit Accounts



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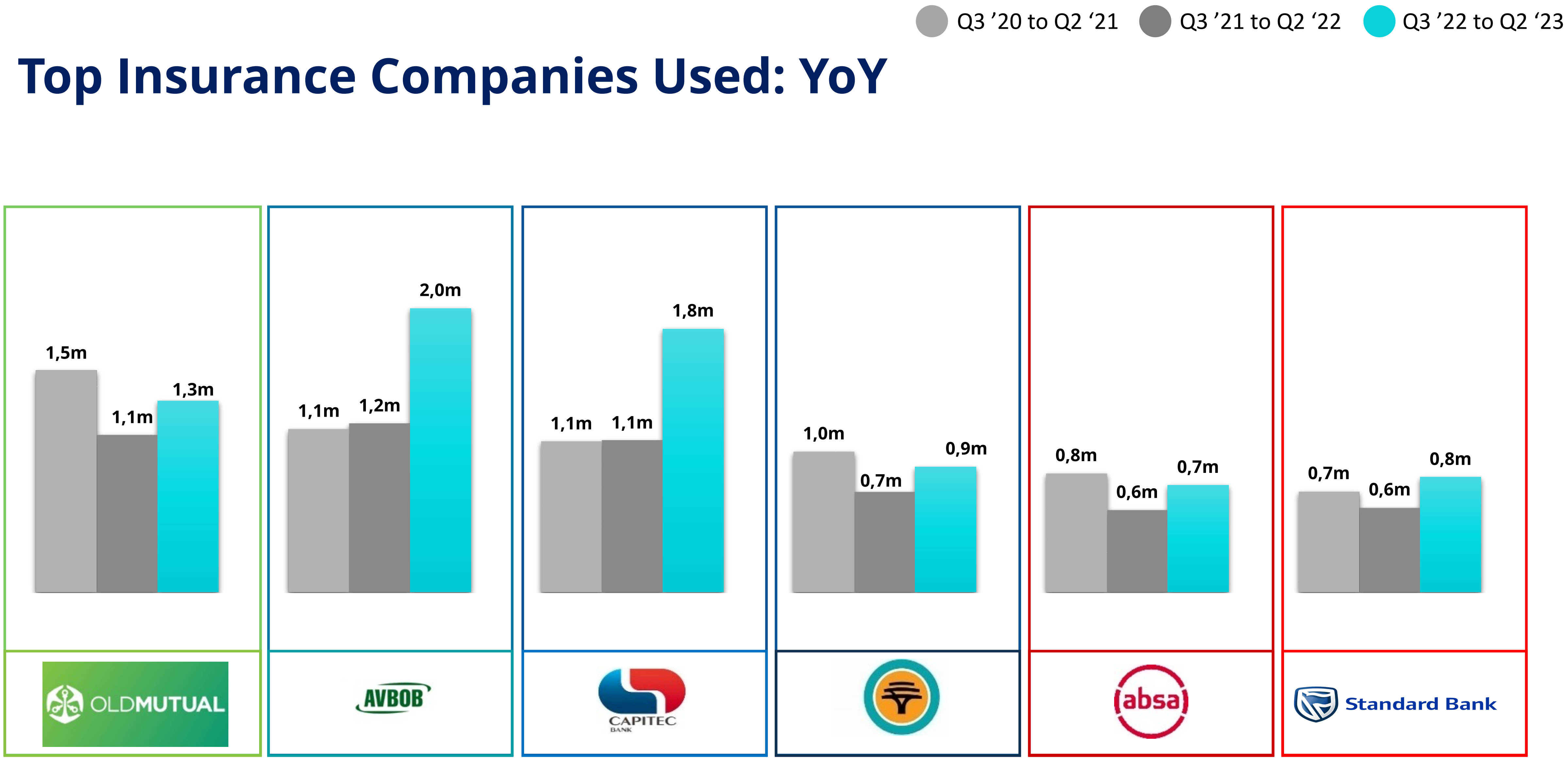
Top Insurance Companies Used: YoY



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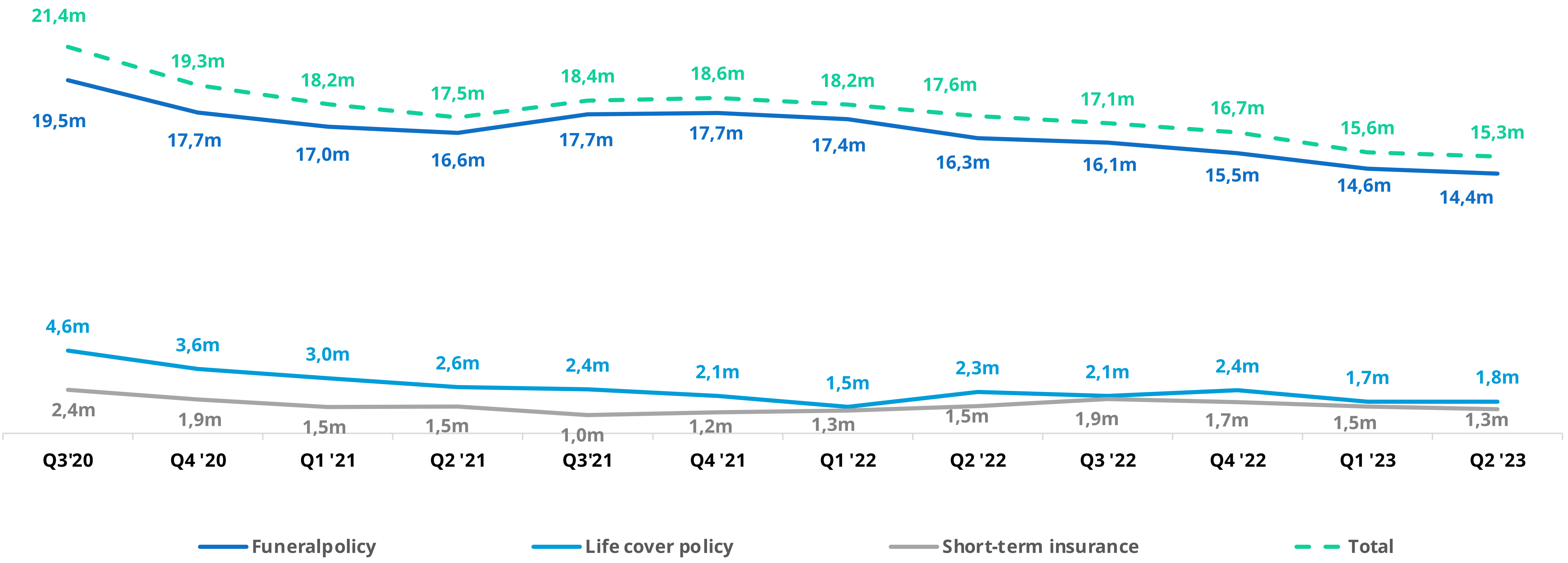
Insurance Penetration Trend Line: QoQ



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Retail

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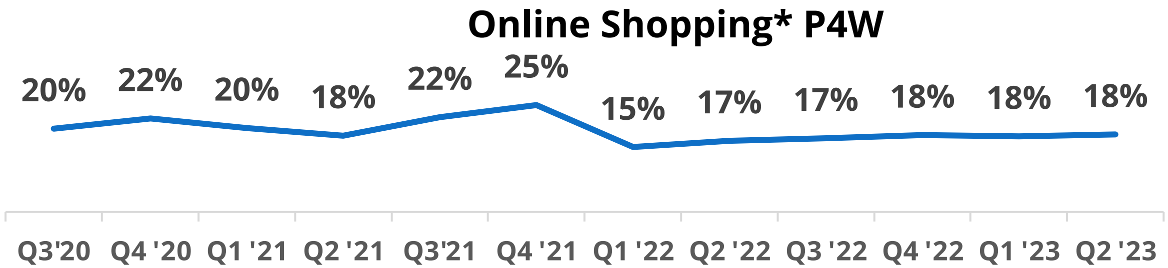
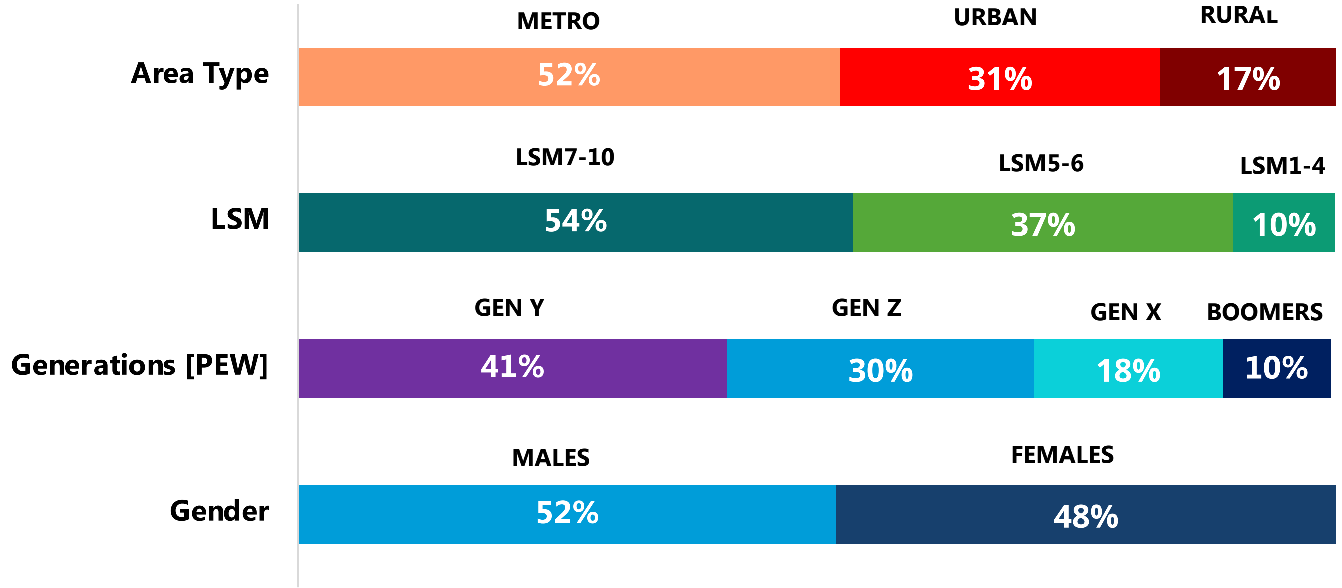
e-Commerce (P4W)

e-Commerce (P4W) Penetration
18%



n=7 787 872



Top 3 online shopping categories [P4W]

1. Communications/cellphones/prepaid (minutes/data/SMS)
   5.04 million
2. Clothing
   1.34 million
3. Food/drink
   1.22 million

866K most often use food delivery service when purchasing take-aways.

Mr D: **P4W** 342K

Uber Eats: **P4W** 151K

SHEIN: **P3M** 221K*

SUPERBALIST.COM: **P3M** 58K*

CLOTHING PURCHASE ONLY*

Jul'22- Jun'23 Pop 15+: 43 592 223

Online shopping* - Percentages displayed on the graph at the top are based on the total population.
The demographic profile results are based on n = 7 787 872.

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Fast Food

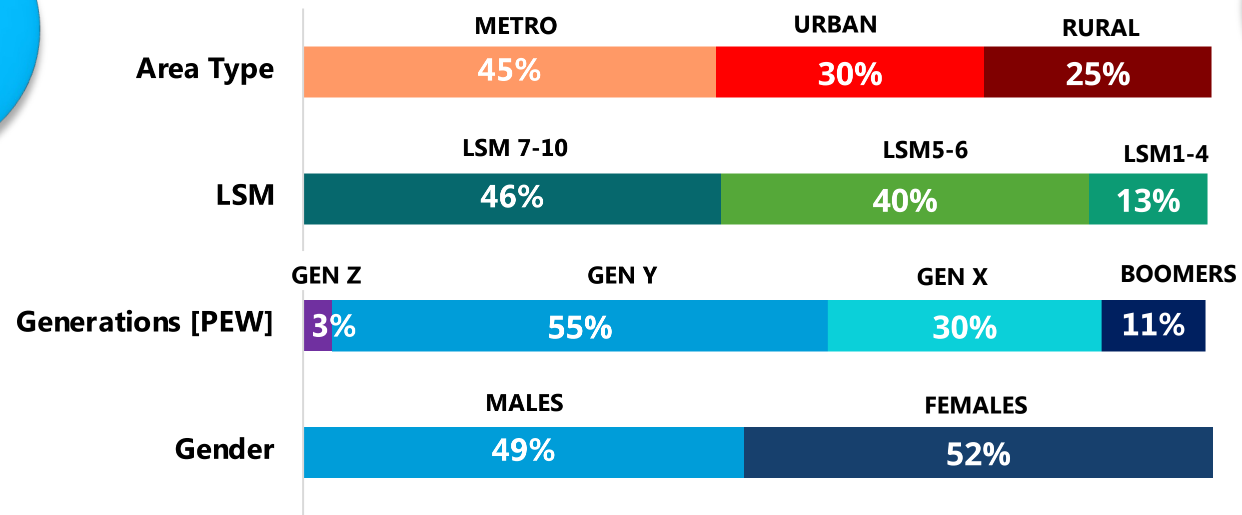
45.3% bought fast food P4W

R182 average spend on fast food on last restaurant visit.
3,3% increase from 2022

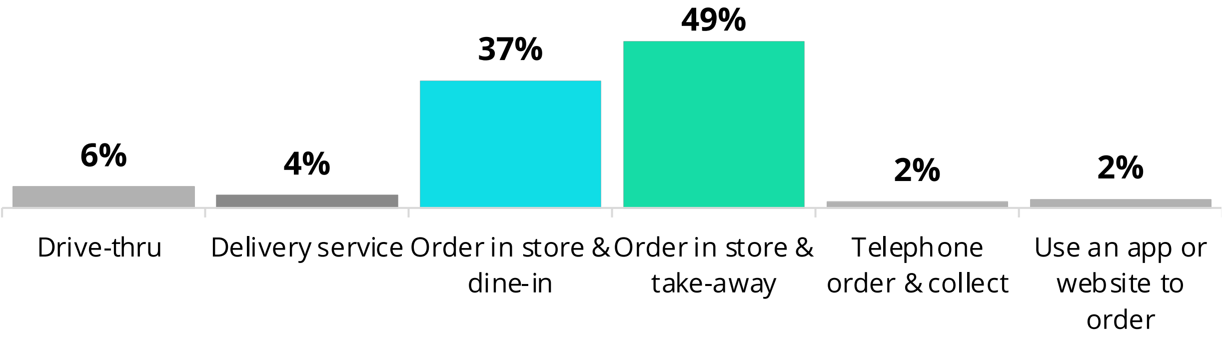
866K use Fast Food delivery Service

Average party size on last restaurant outing: **3**

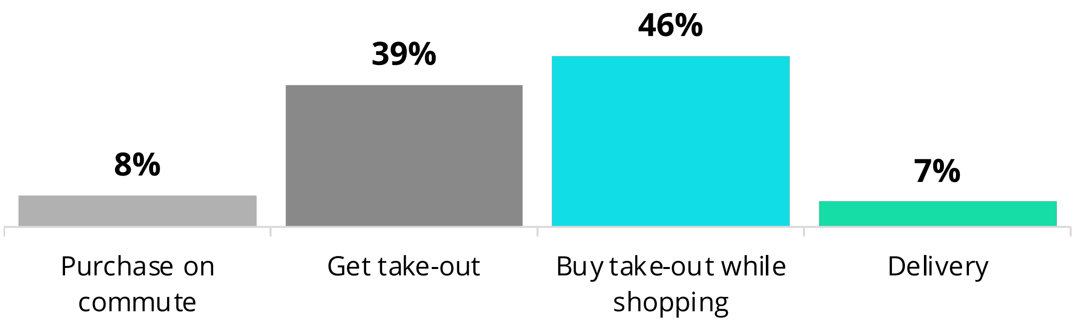
Fast Food Purchases



How fast food is ordered



Buying behaviour

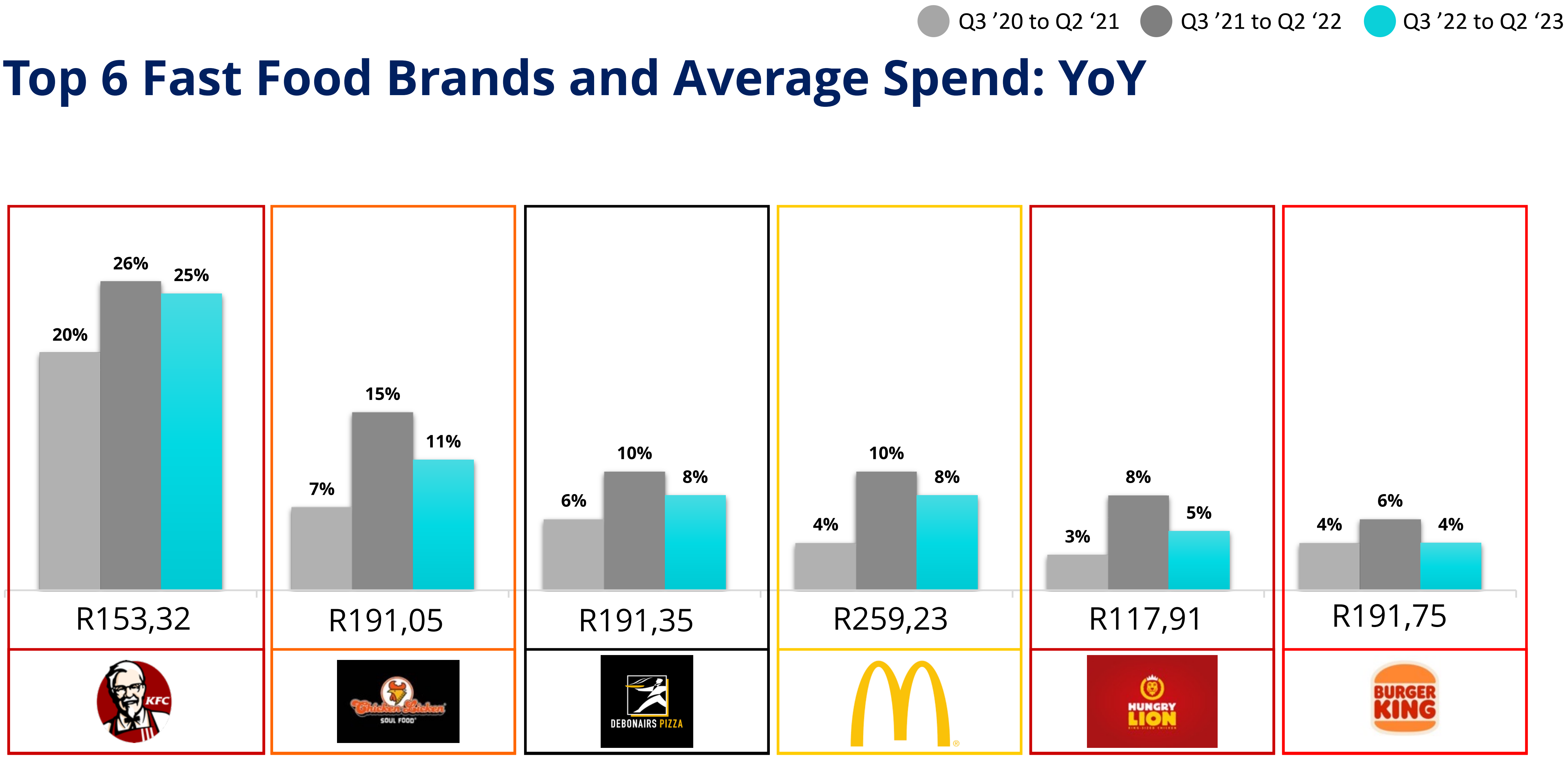


32% order from Uber Eats

72% order from Mr. D

Jul'22- Jun'23 Pop 15+: 43 592 223

Top 6 Fast Food Brands and Average Spend: YoY



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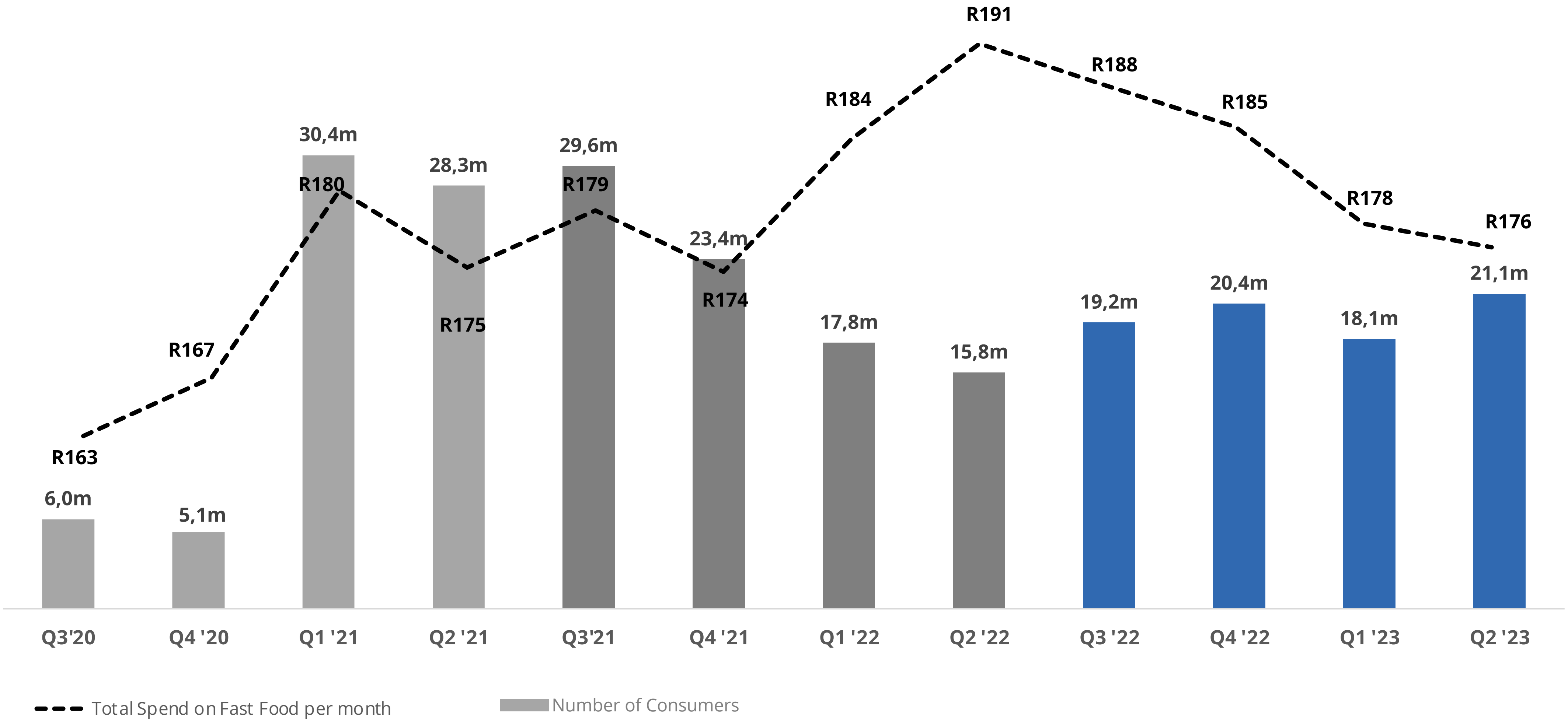
Jul '22- Jun '23 Pop 15+: 43 592 223

Fast Food Consumption and Expenditure (Last Visit): QoQ



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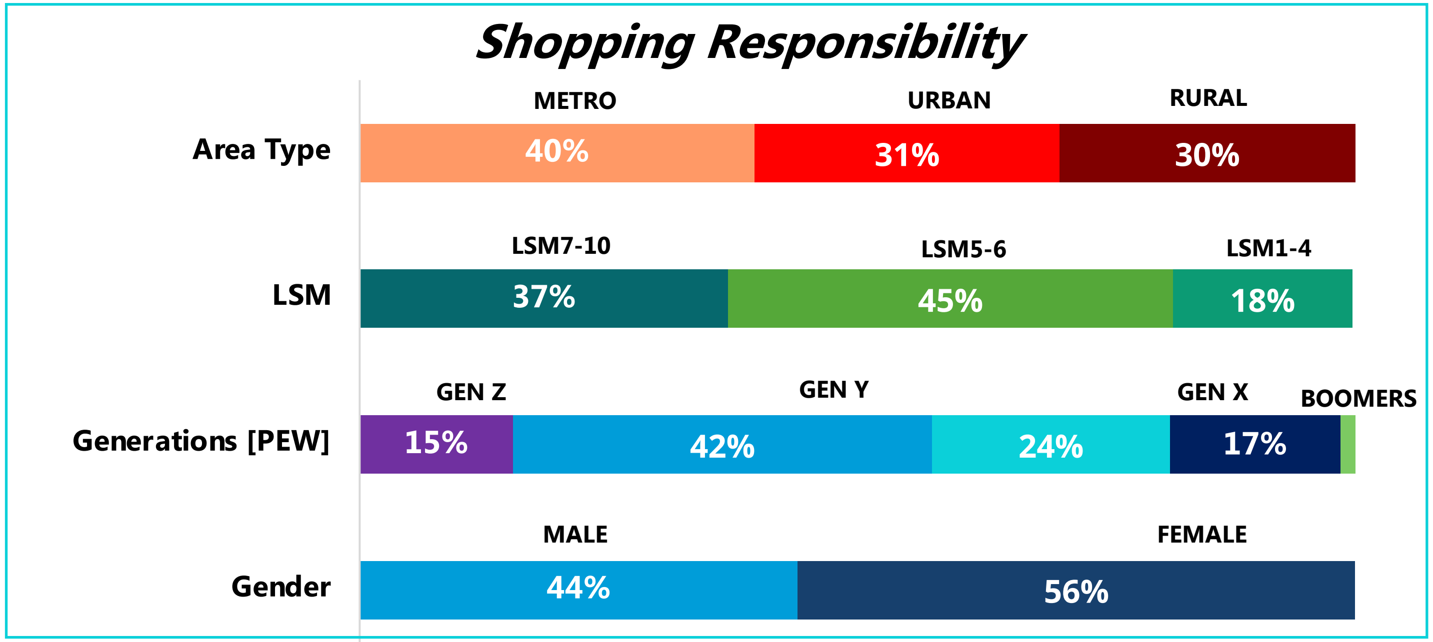
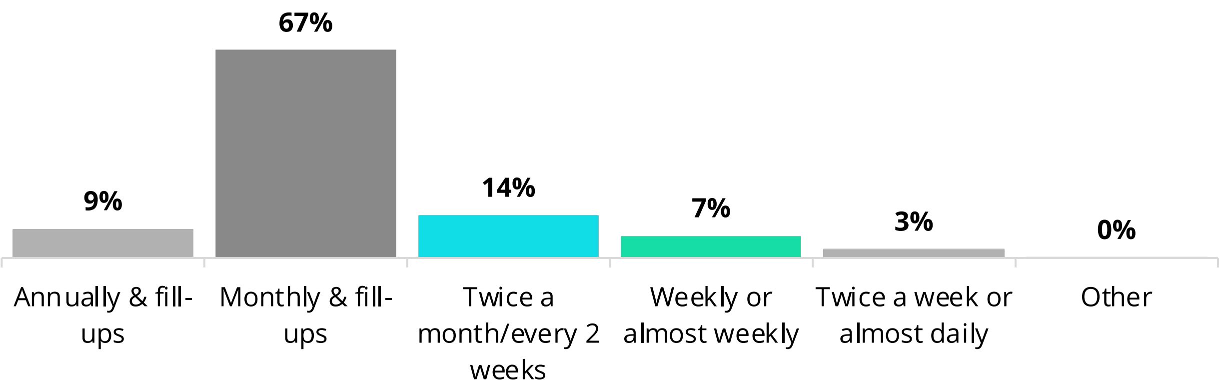
Groceries

R1 982 average monthly spend on groceries.

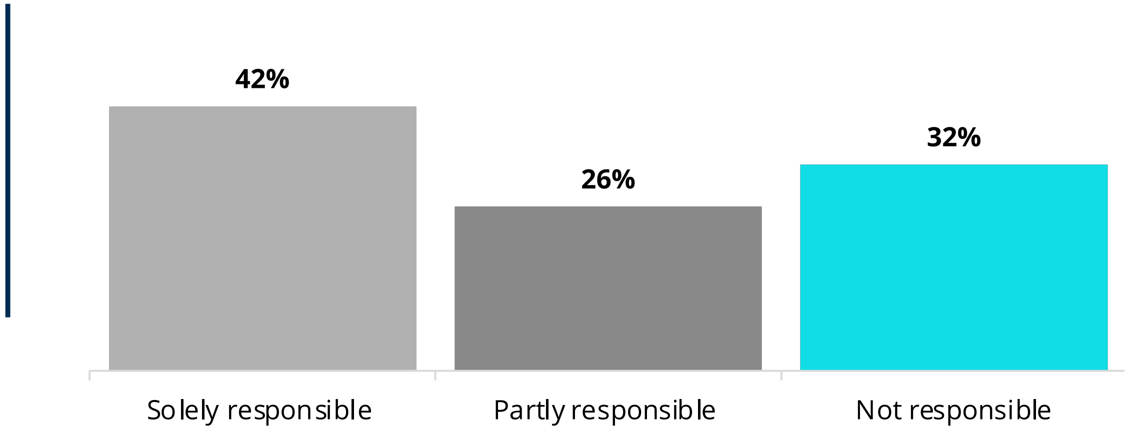
54.6% of the respondents usually do the grocery shopping themselves in their household.



How grocery shopping is done



Household purchases responsibilities



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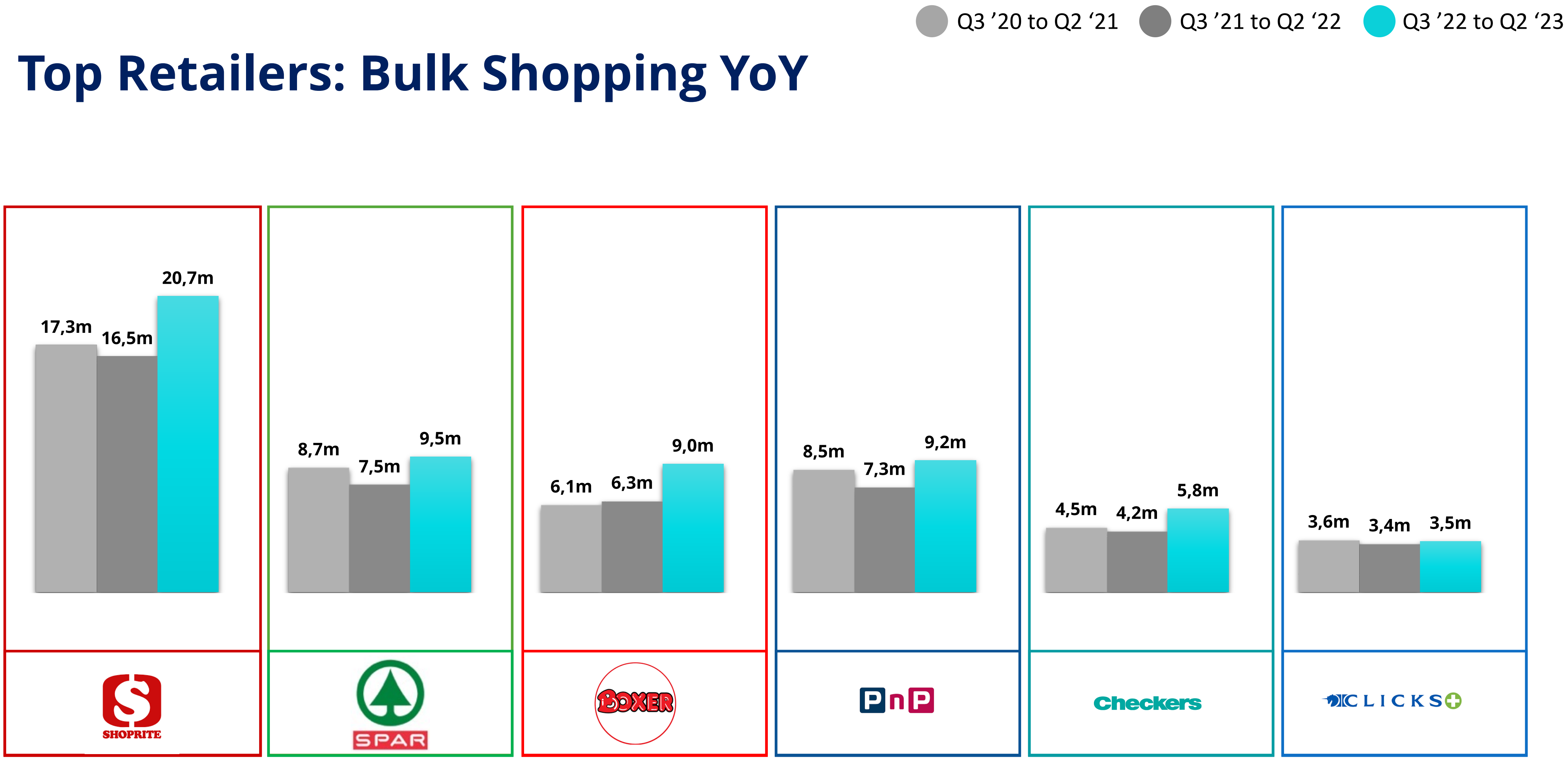
Top Retailers: Bulk Shopping YoY



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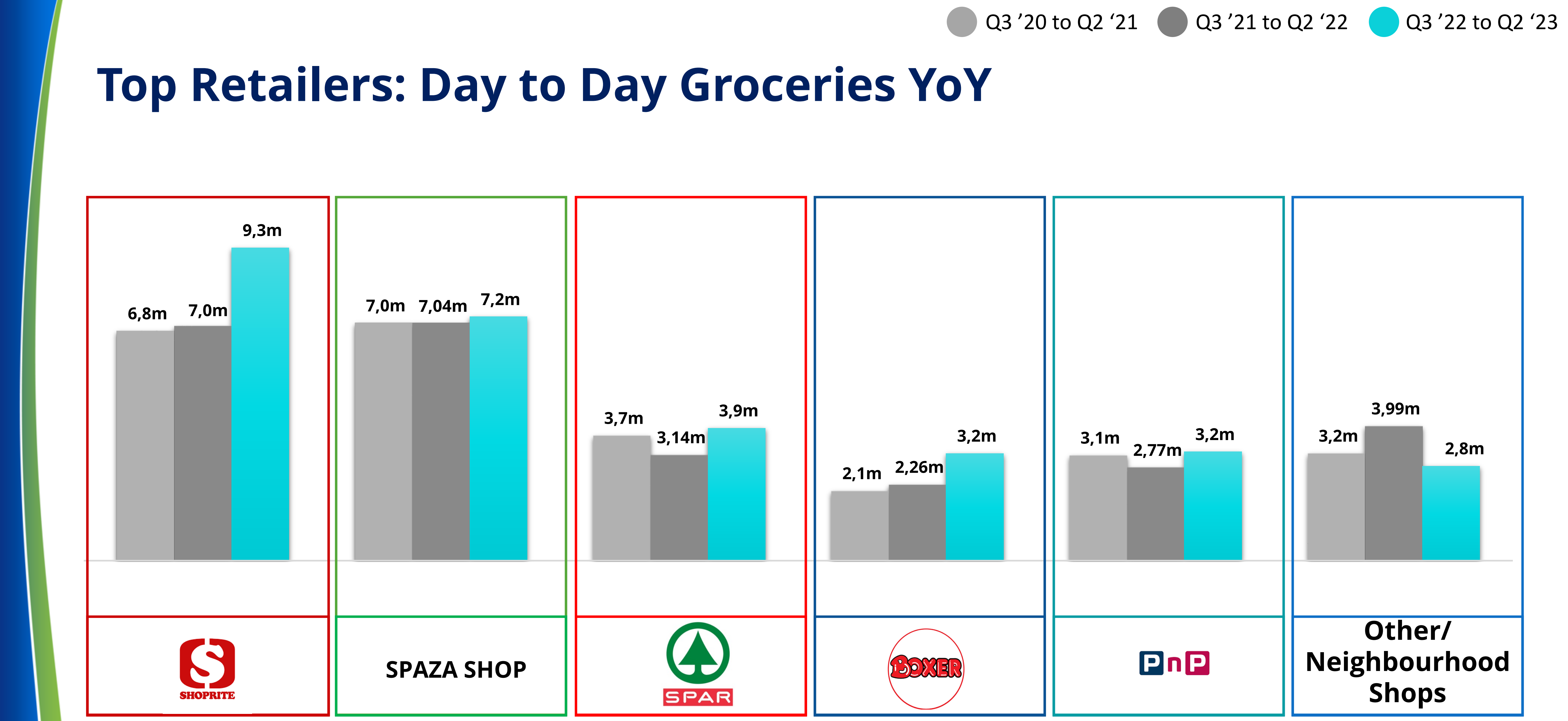
Top Retailers: Day to Day Groceries YoY



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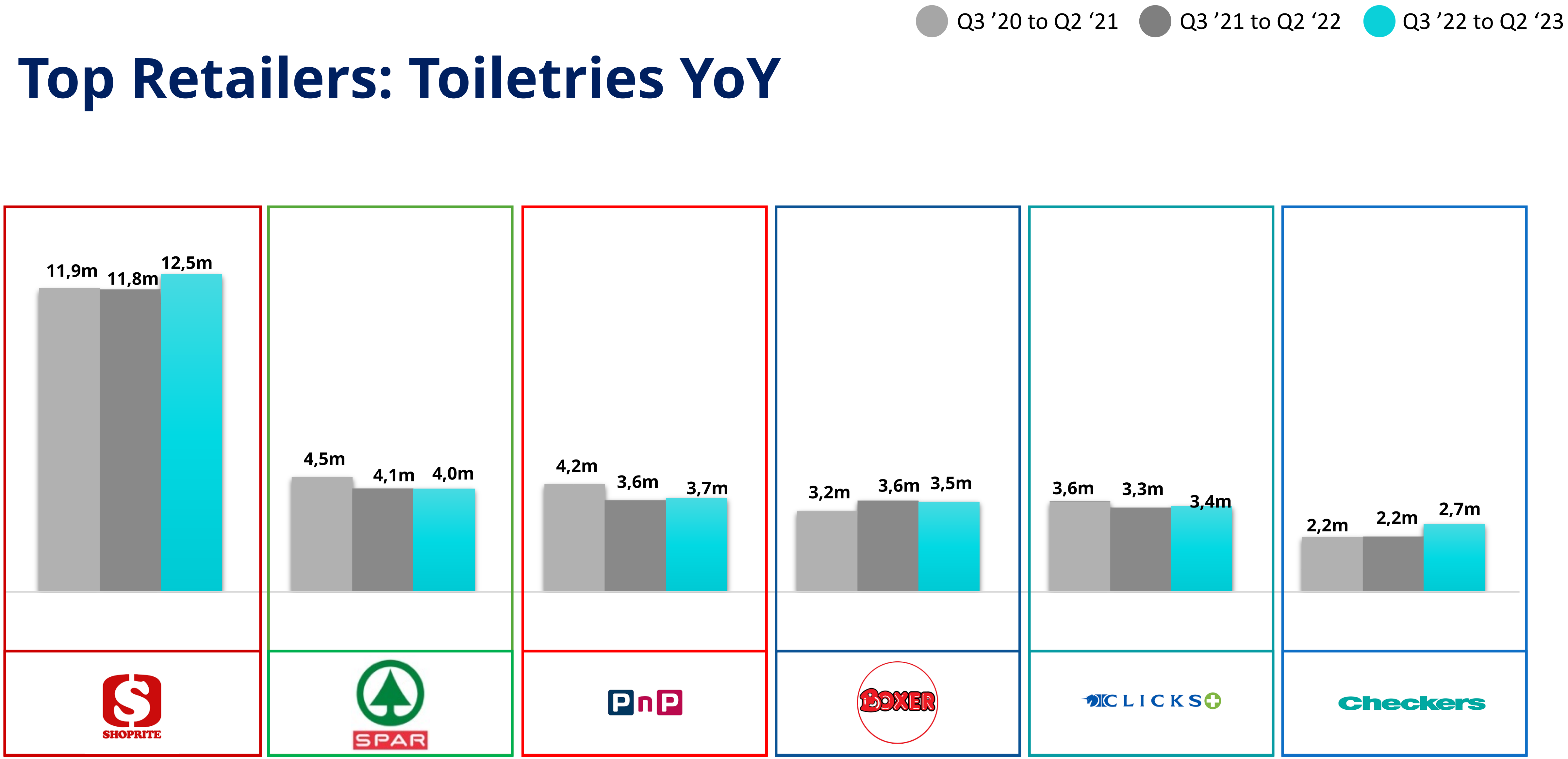
Top Retailers: Toiletries YoY



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Jul '22- Jun '23 Pop 15+: 43 592 223

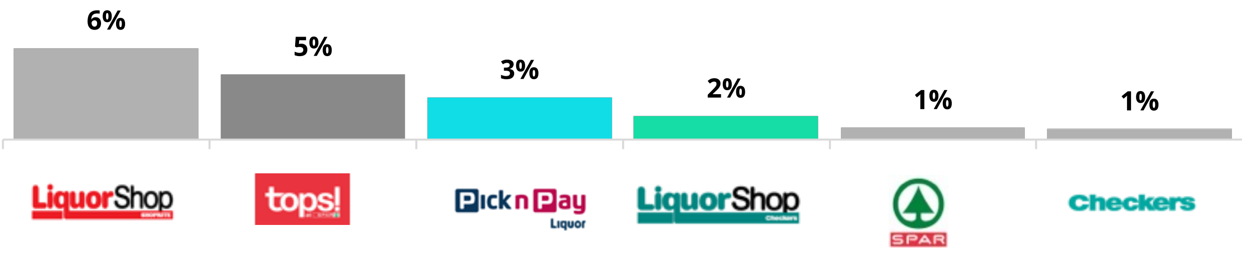
Liquor Consumption

R475 average monthly spend on alcoholic beverages

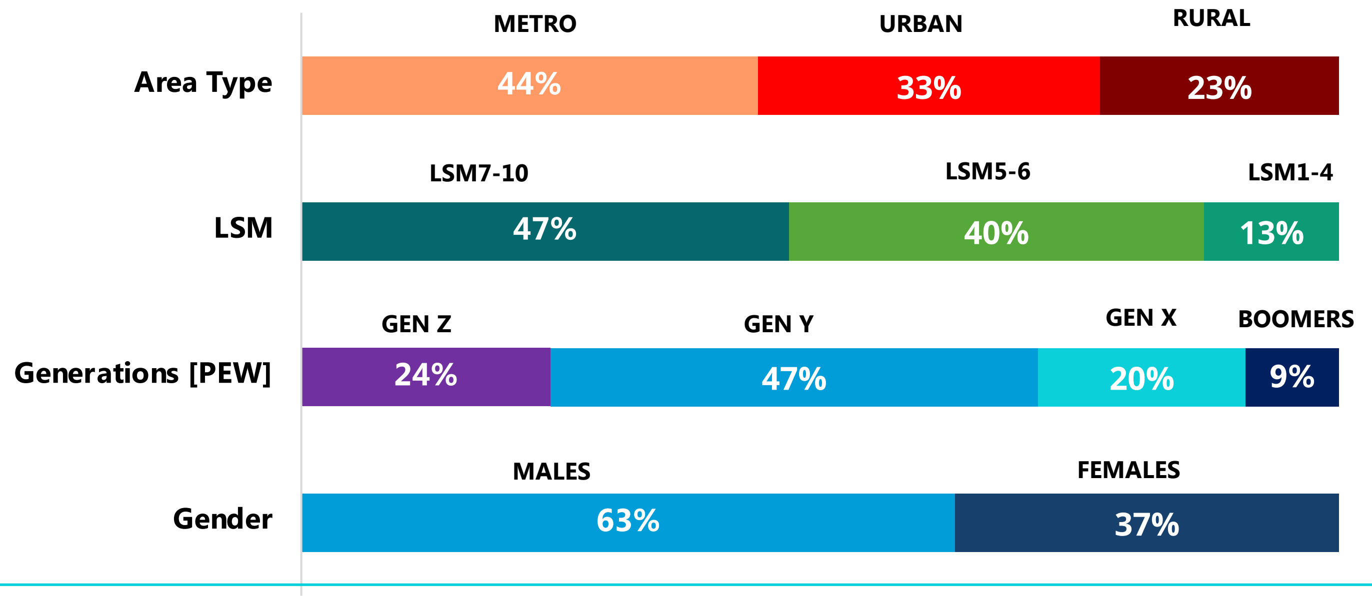
34% bought liquor in P4W

16% bought liquor in P4W from a tavern/shebeen

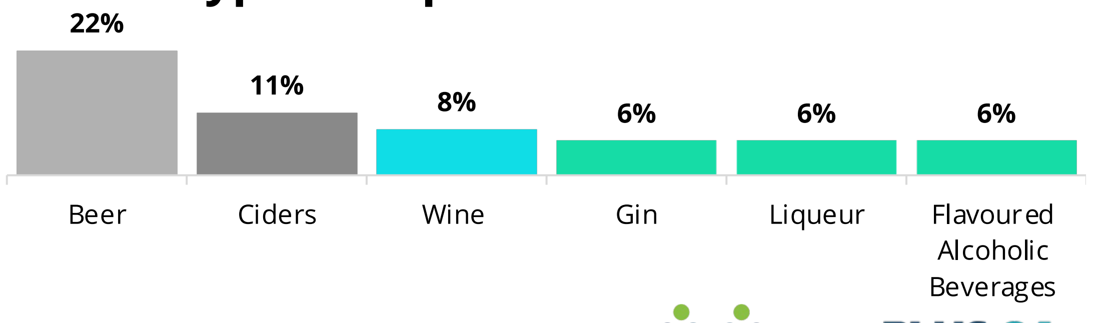
Top Liquor Outlets P4W



Bought Alcohol P4W Population Distribution



Type of Liquor Consumed P4W



Jul'22- Jun'23 Pop 15+: 43 592 223

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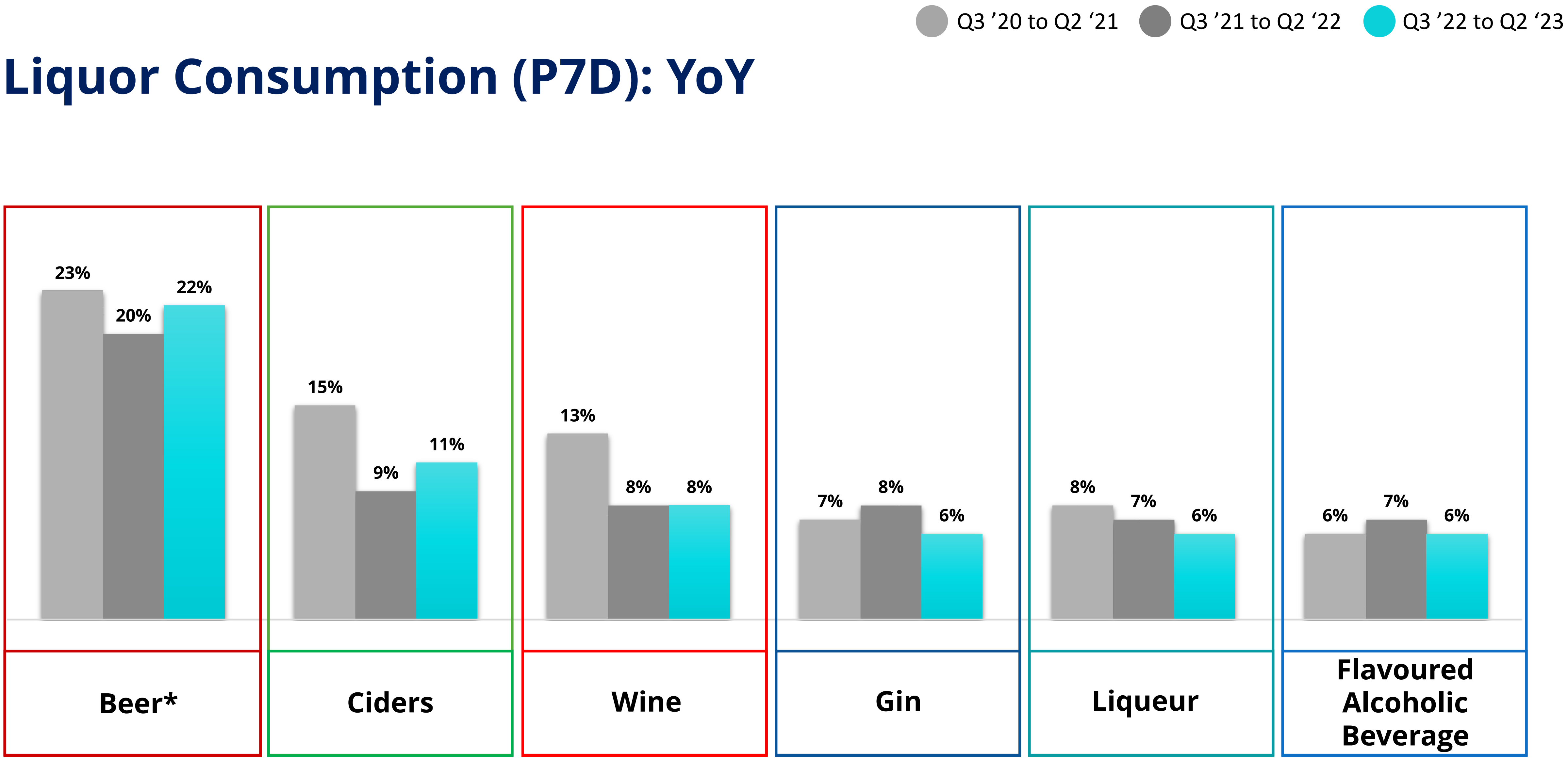
Liquor Consumption (P7D): YoY



*Traditional beer not included

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Jul '22- Jun '23 Pop 15+: 43 592 223

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Contact Details

Further Information

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

mrf@mrfsa.co.za

[Marketing Research Foundation (mrfsa.org.za)](mrfsa.org.za)

Thank You

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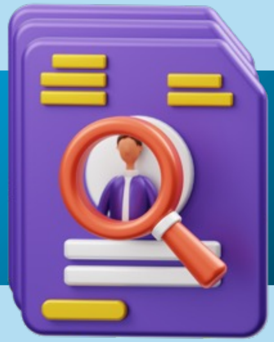
Scope of MAPS

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

Face to Face

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

Behaviour & Brands (leave behind)

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

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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

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Sampling

Distribution:

Metro	Urban	Rural
50%	30%	20%

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)

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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

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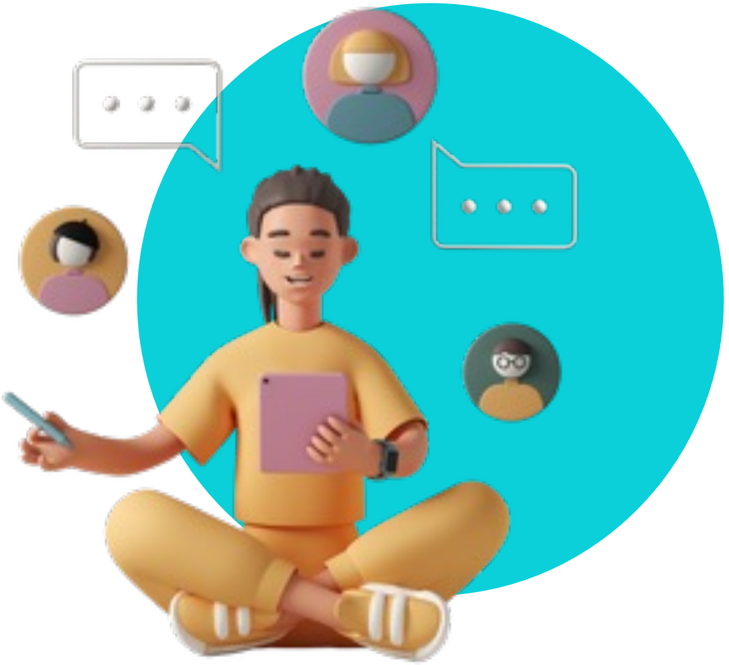
Interviewer Trend Assessment

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.

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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:

1 **Level 1:**
Consistency assessment of the three captured GPS points.

2 **Level 2:**
Deviance assessment of the sampled point and first captured GPS point with a tolerance deviation of 25 metres.

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

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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

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Data - Logic testing

- Logic testing is the primary means of identifying anomalies in data.
- A set of survey questions is selected, and data is cross tabulated to identify such anomalies.
- Assessment is done on the following categories:

Demographics

Finance Section

General Consumption Section

Scrutiny Process

Start 1

Checking - Simultaneous

- Points sampled against maps – AfricaScope
- Stability of data - Softcopy

2 10 days

Dataset for scrutiny – uploaded

Eighty 20 Portal and prepared for scrutiny by the Scrutiny Team (users)

10 days 3

Scrutiny Process

Analysis and sense checks- stability, shifts, trends, etc. Reports findings back to Plus 94 team

4 10 days

Final Dataset for release

- Plus 94 adjusts data, if required.
- Released to software providers for system uploading.

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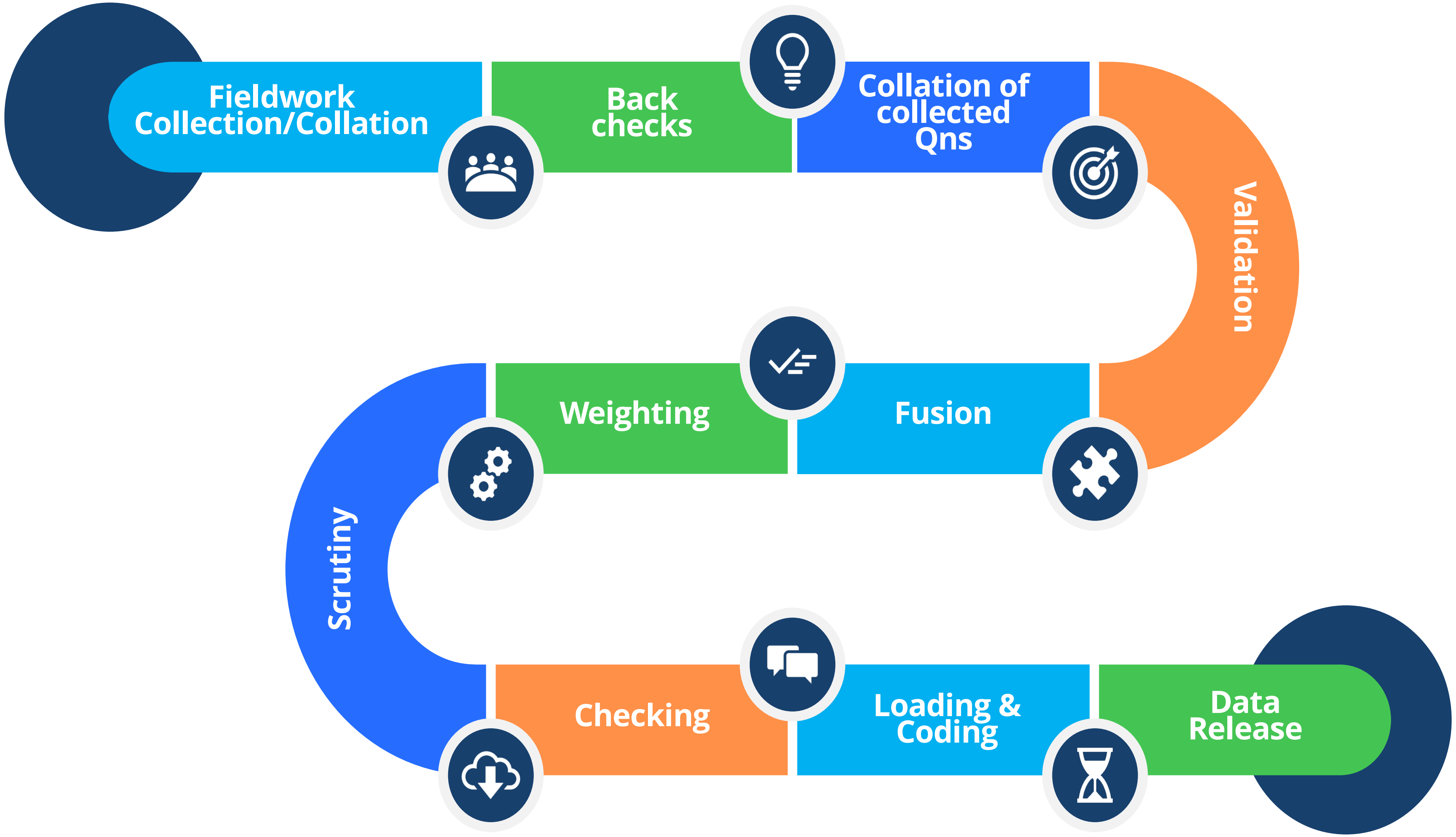
Data Preparation and Release Process



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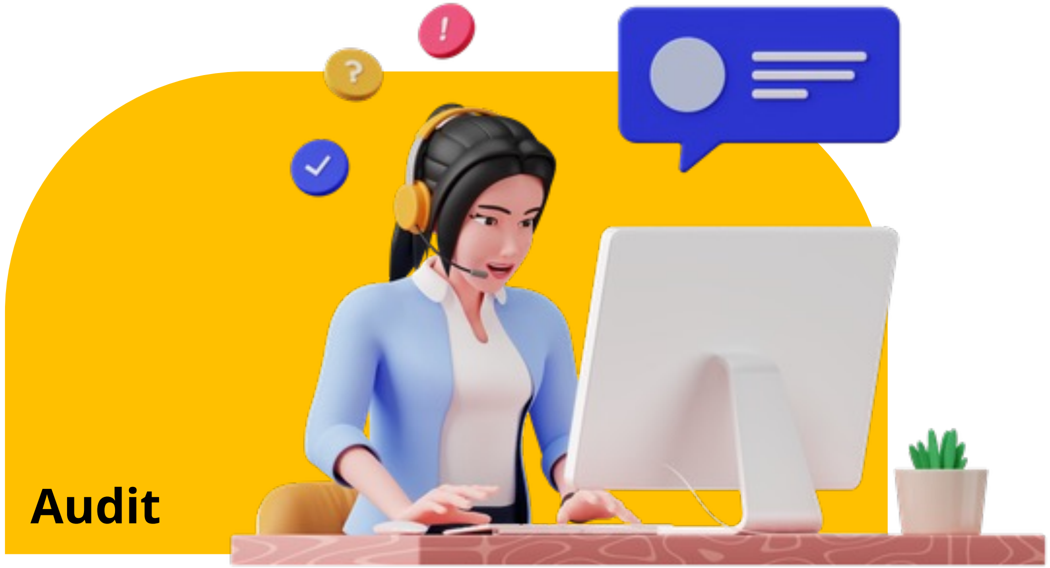
Audit – Aug/Sept 2022



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

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

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)***

GeoScope South Africa

What is GeoMAPS?

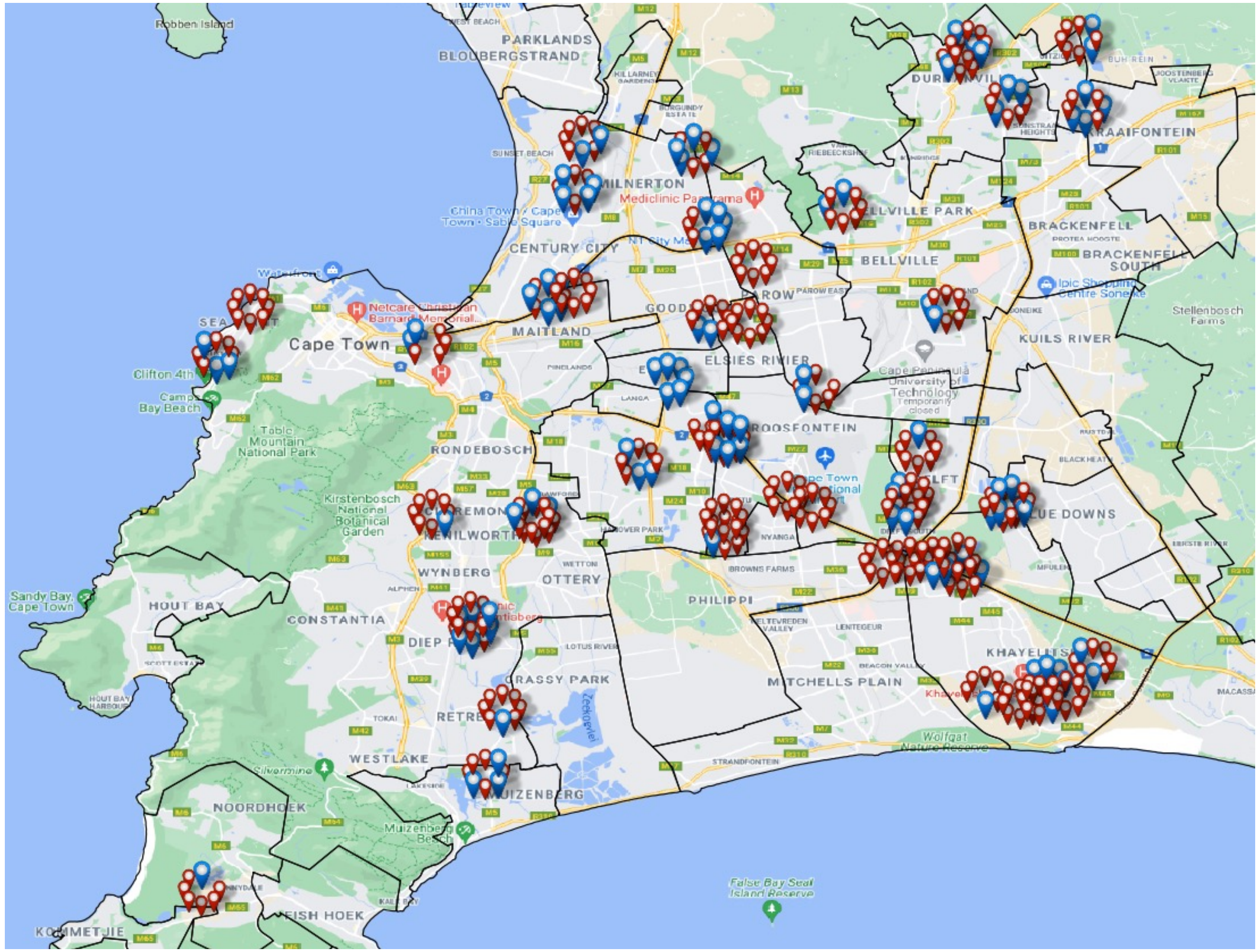
It gives MAPS a geographic context, using location to add a visual dimension to consumer data, empowering you to visually pick up on trends and patterns at a neighbourhood level.

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

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)**

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How GeoMAPS benefits you?

GeoScope South Africa

See your consumers

GeoMAPS will allow marketers to dig deeper, see a bigger picture, grow market share and make strategic decisions faster with more accuracy through a detailed view of consumer data down to the neighbourhood level.

Profile your consumer segments in detail

Adding a geographic approach to segmenting ensures relevant messages are targeting the right audience, in the right areas, using the right media.

Find and target new consumer segments

Existing customers already know their preferred brand, the challenge is to better understand existing customers to successfully target new consumers with similar profiles, interests, needs and buying behaviours.

Maximise your marketing ROI and increase market share

By more accurately understanding consumers at a neighbourhood level, you can maximised your ROI through marketing spend in the most profitable geographic areas, thus achieving increased market share.

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