



MARKETING RESEARCH  
FOUNDATION

**PLUS 94**  
**RESEARCH**

# MAPS

MAPS WEBINAR:  
July '20 – June '24



NOVEMBER

20  
24

# 186

Interviewers in field

# 20 000+

Interviews conducted per year

# 10 000+

Leave-behind questionnaires per year

**Stratified Random Sample**  
**All Provinces**  
**All Districts**  
**All Municipalities**

Sample Distribution



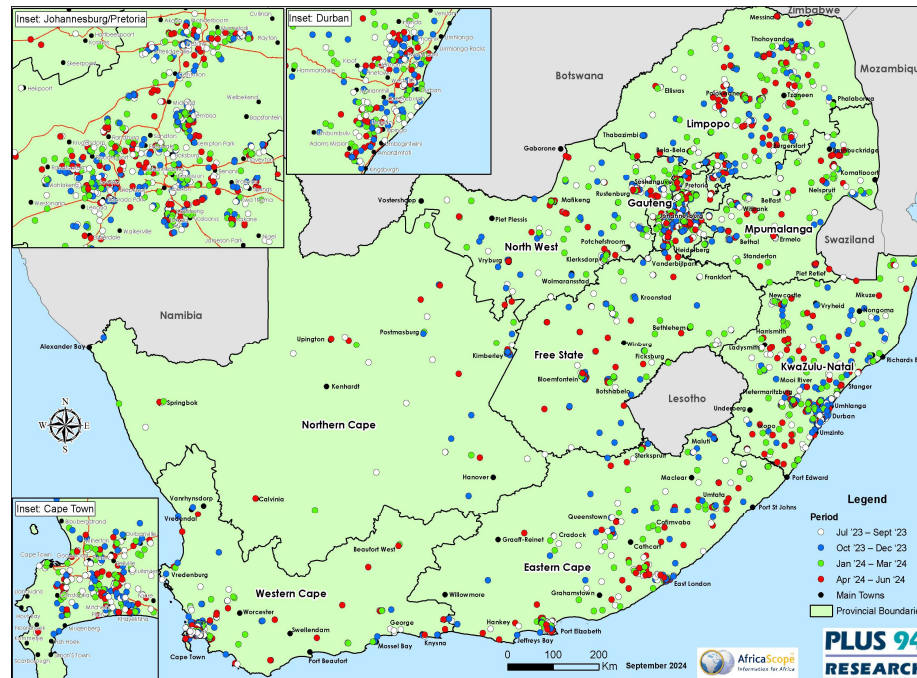
**50%**  
METRO



**30%**  
URBAN



**20%**  
RURAL



## Categories

Demographics | Segmentation | Equipment and devices in HH | Property & Home/spend | Home maintenance/DIY/Improvements & spend | Internet interaction | Appliances – Brands and store purchased | Furniture and Home Décor | Clothing | Shoes | Apparel spend | Cellphones | Vehicles | Financial | Personal expenditure | Purchasing behaviour | FMCG consumption/ brands | Cosmetics | Fast Food – behaviour, consumption and outlets | Travel | Media | Malls | Leisure | Activities | Activities | Interests | Psychographics | Shopping – Purchasing behaviour/ Grocery stores/Liquor outlets/buying habits/volumetrics and spend/Clothing purchasing and stores/instore/online/spend | Property Ownership | Pet Ownership | Interests and Hobbies | Attitudes on current affairs Decision making on purchases | Financial behaviour | Online and in-store shopping | Grocery purchasing behaviour – bulk vs. daily | Clothing purchasing behaviour and expenses | Household appliances purchasing and decision making process

## Media Interaction

**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 | Commercial stations | Community Stations | Online listening

**Print** – Online and Paper – Newspapers | Newspaper Inserts | Magazines | Store Magazines

**Cinema** – Frequency | Average spend | Loyalty cards | Cinema visited – indoor/outdoor

**Outdoor Advertising** - Billboards – indoor, outdoor and digital | Branding/advertising on buses and taxis | Dust bins | street poles | Trailers | Digital screens | Inside Restaurants/nightclubs/schools incl washrooms | Spaza shops | Murals and Grafitti

**Streaming** – Netflix | YouTube | Showmax | etc

**Social Media** – facebook | WhatsApp | Twitter | etc

**Online** – Sites visited

**Behaviour** – Time spent | Multiplatform

## Financial

Commercial banks | Banking products and facilities | Money transfer services | Loyalty/rewards retail store programmes |

Medical aid schemes | Investments and saving | Short-term and long-term insurance policies | Other medical insurance | Purchase of items on credit and personal loans | Medical Aid | Behaviour (saving and loans) | Decision making | Funeral policies | Stokvels | SASSA government grants

*Note: Brands measurement is dynamic. Brands measurement is increased in two ways:*

1. Once 40+ respondents choose a brand, it is automatically included in the dataset and pre-coded in the questionnaire
2. Brands are added to the questionnaire on the request of subscribers



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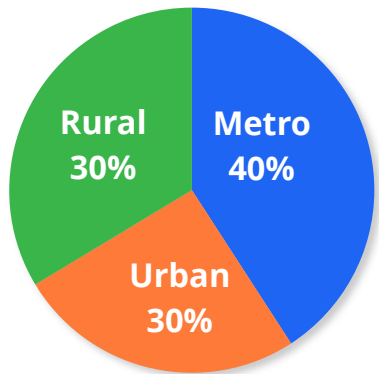
# Demographics

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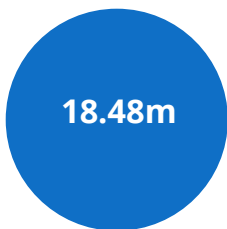


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## Area Distribution



## Households



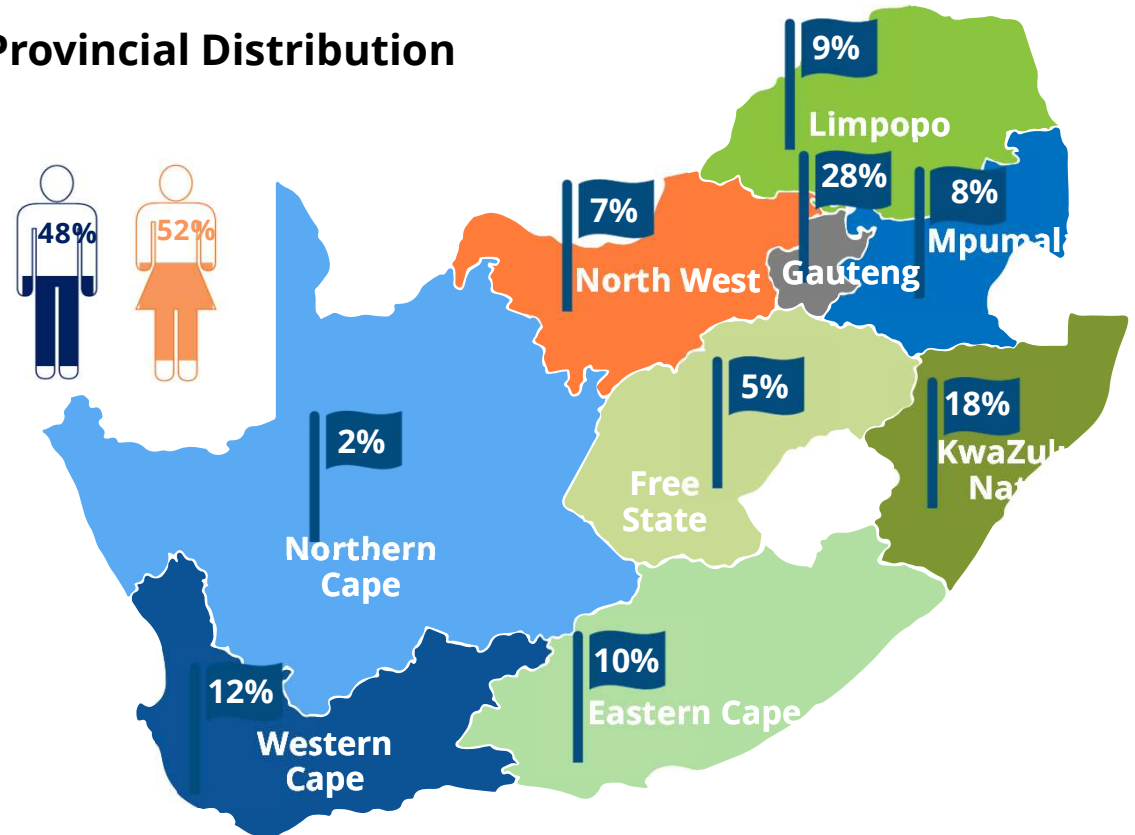
## People per household



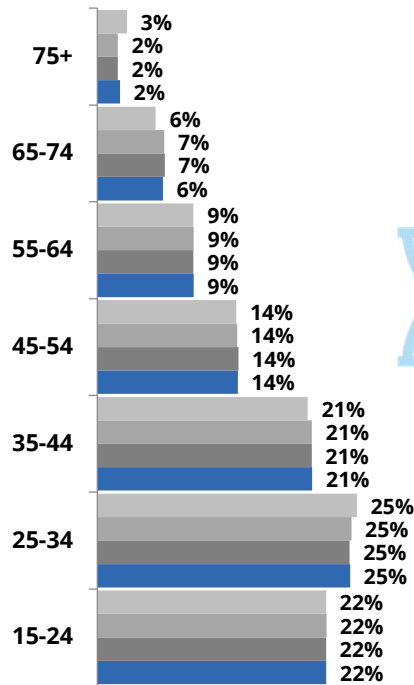
## Dependants per household



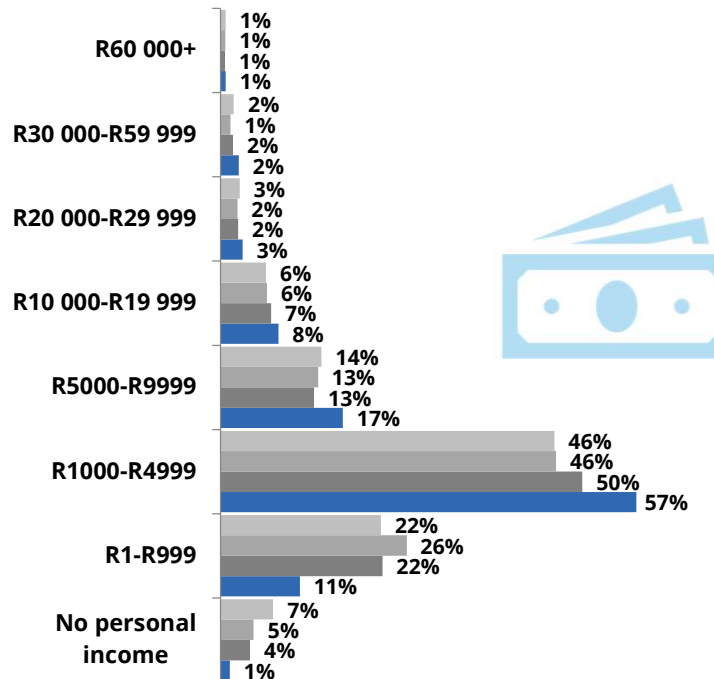
## Provincial Distribution



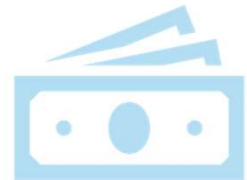
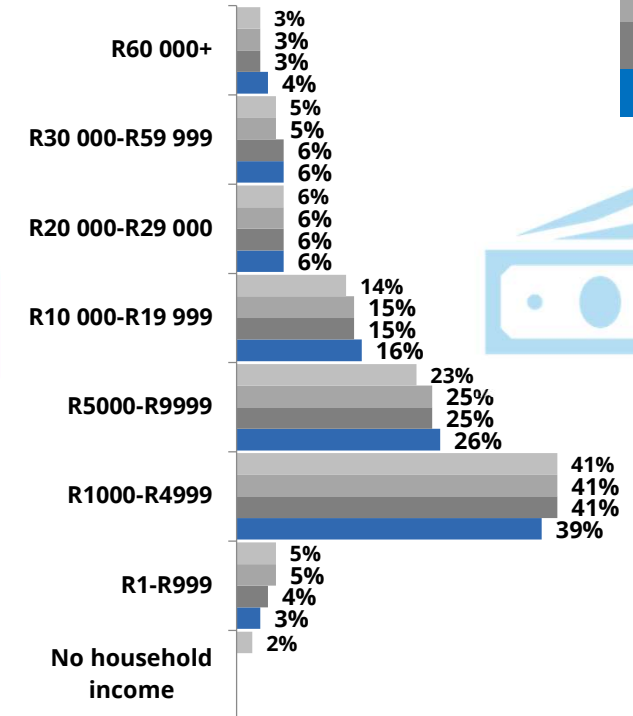
## Age Groups



## Personal Income



## Household Income



Year 1  
Year 2  
Year 3  
Year 4

Average age: 38

Average age: 38

Average age: 38

Average age: 38

Average Income: R 4 814

Average Income: R4 609

Average Income: R 4 813

Average Income: R5 974

Average Income: R 11 105

Average Income: R11 804

Average Income: R12 721

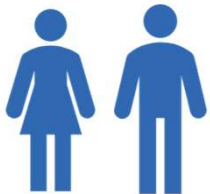
Average Income: R 13 006

## Gender

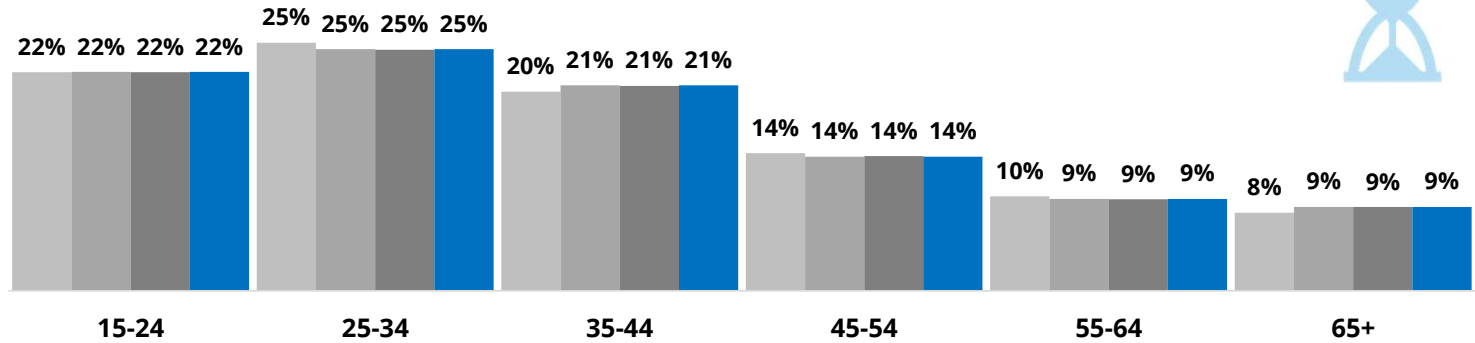


YEAR 1-4

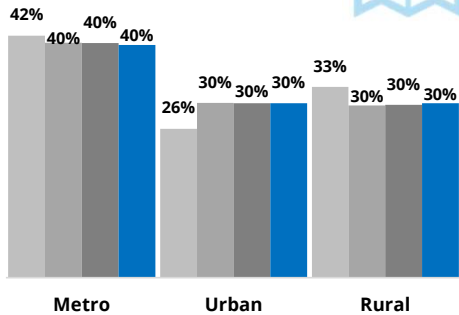
52% 48%



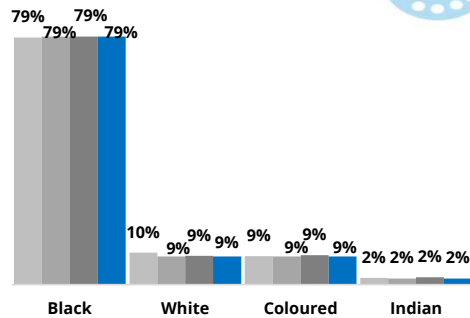
## Age Groups



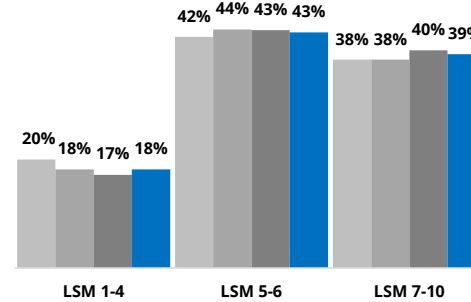
## Area



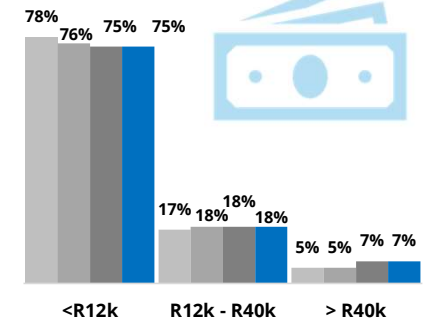
## Race



## LSM



## Monthly Household Income





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# Economic Landscape

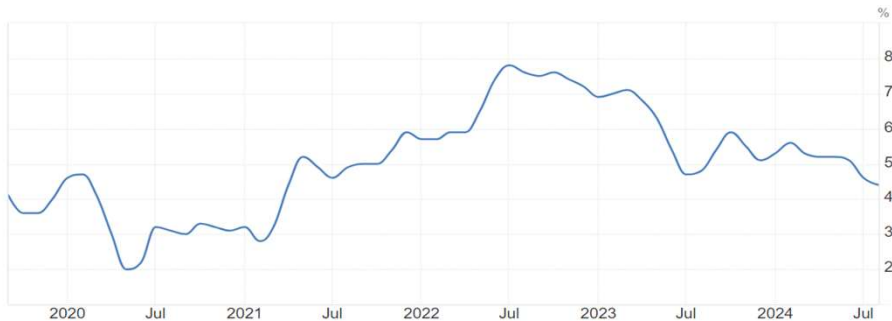
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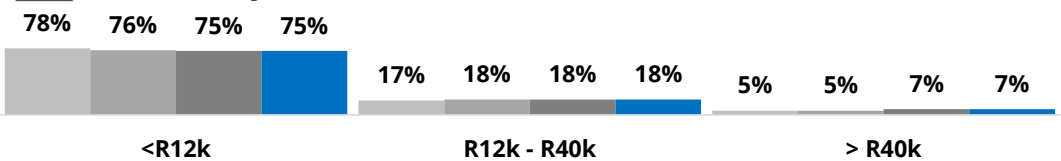


## South African Inflation Rate

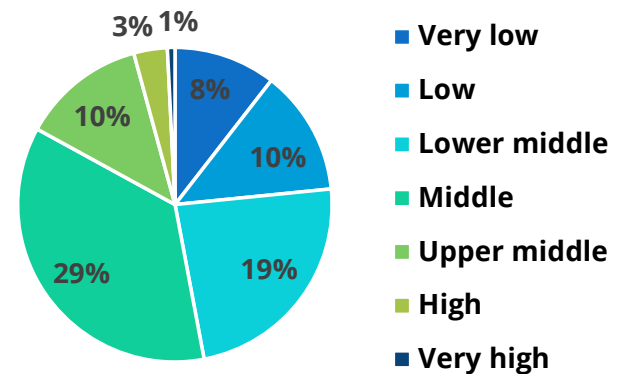


Source: Trading Economics.com

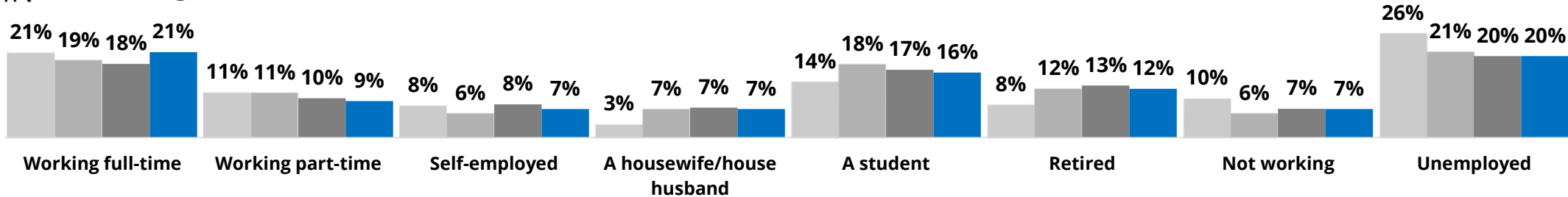
## Monthly Household Income



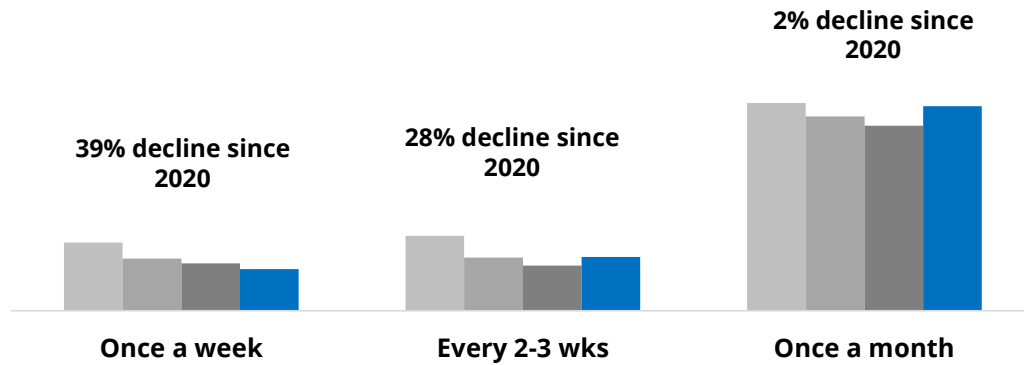
Which socio-economic class or group would you associate yourself with?



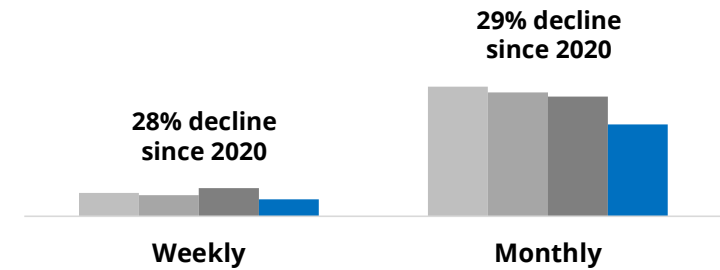
## Working Status



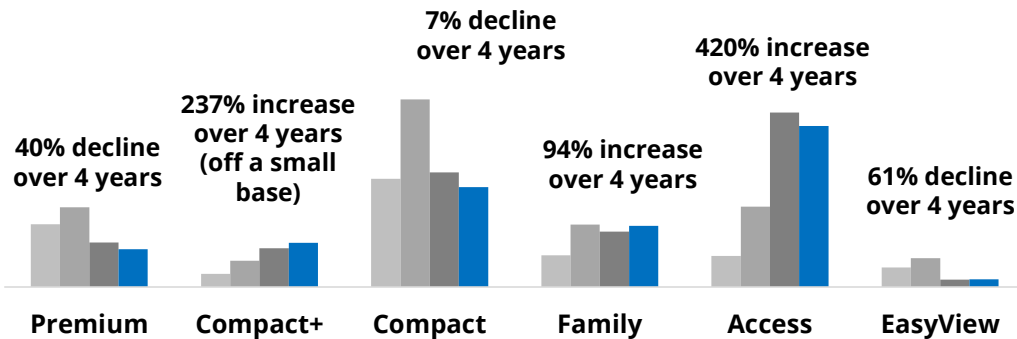
## Fast Food – How Often



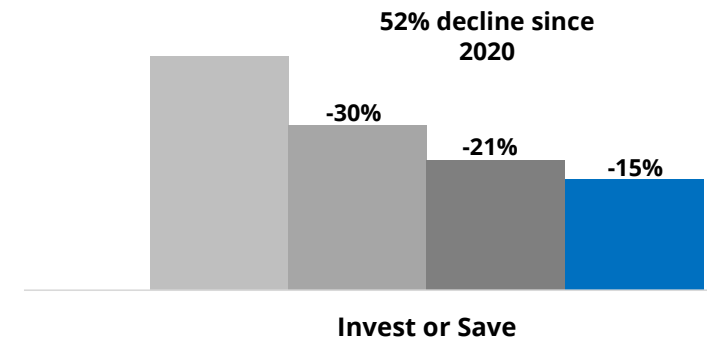
## Eat Out– How Often



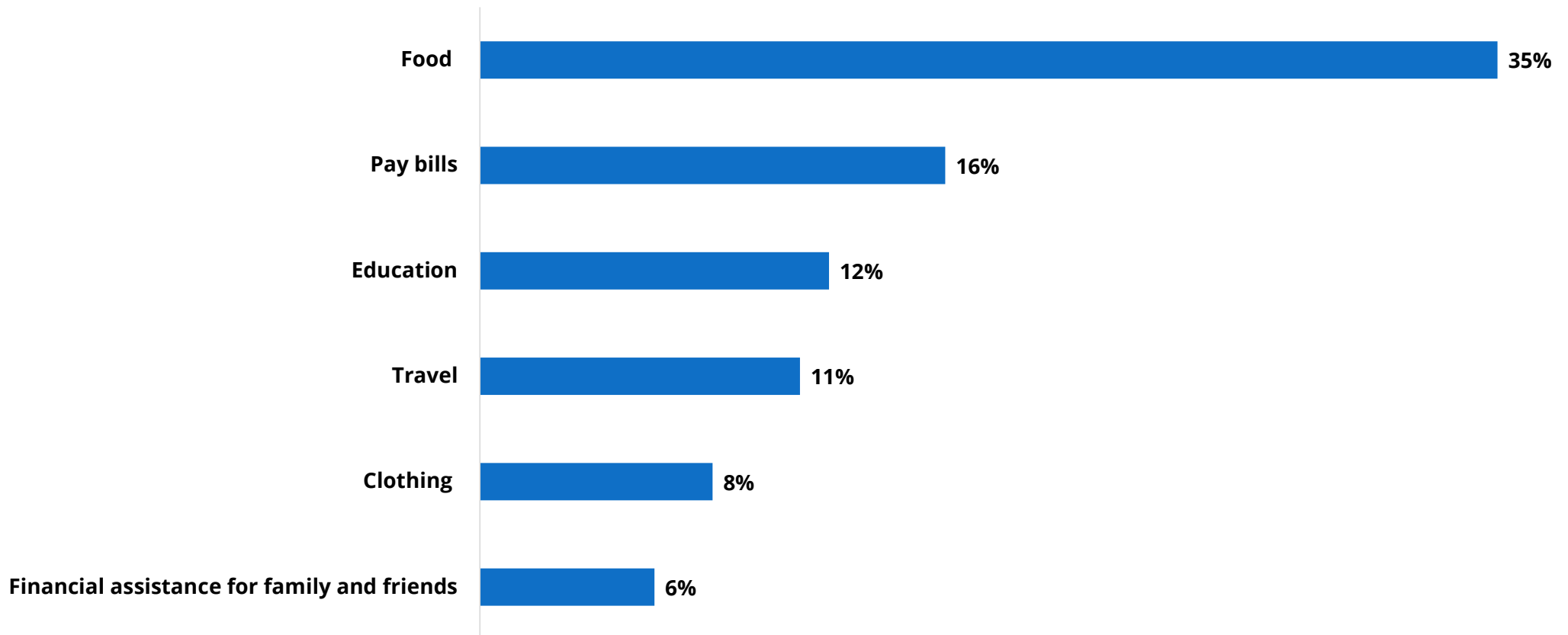
## DStv Subscription



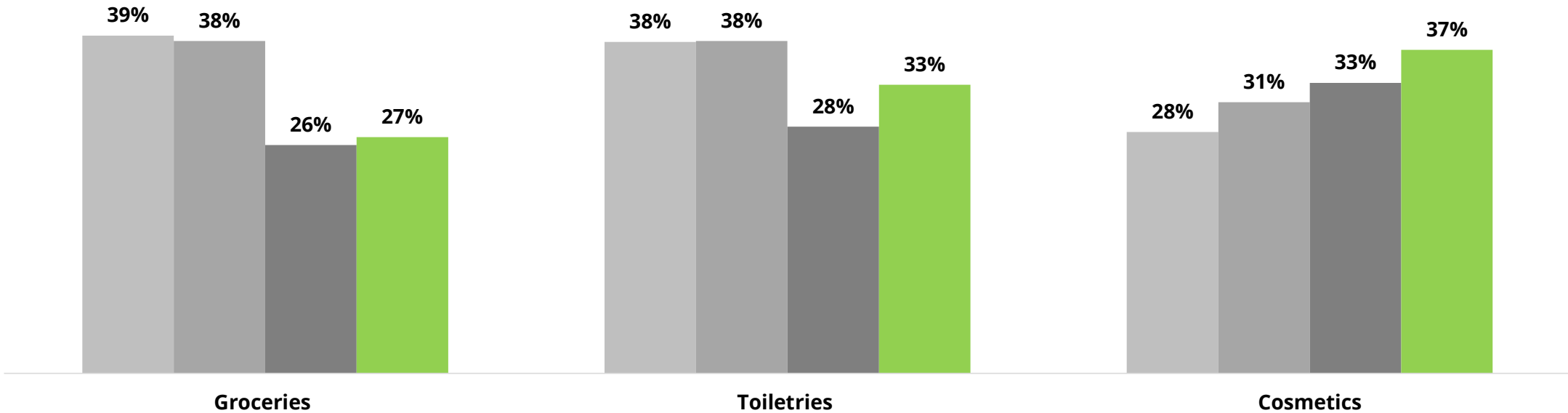
## Save or Invest

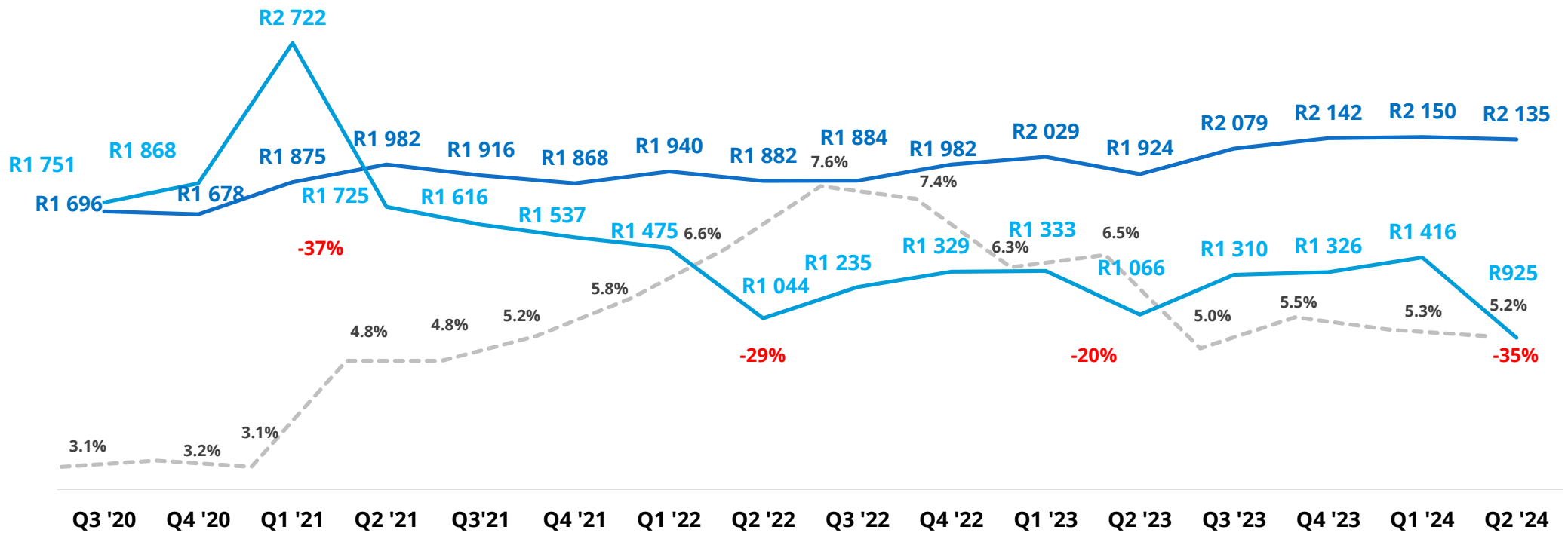


## Top 10 Purpose / Reasons for Loans taken in P12M



## Do you always buy the same brands?





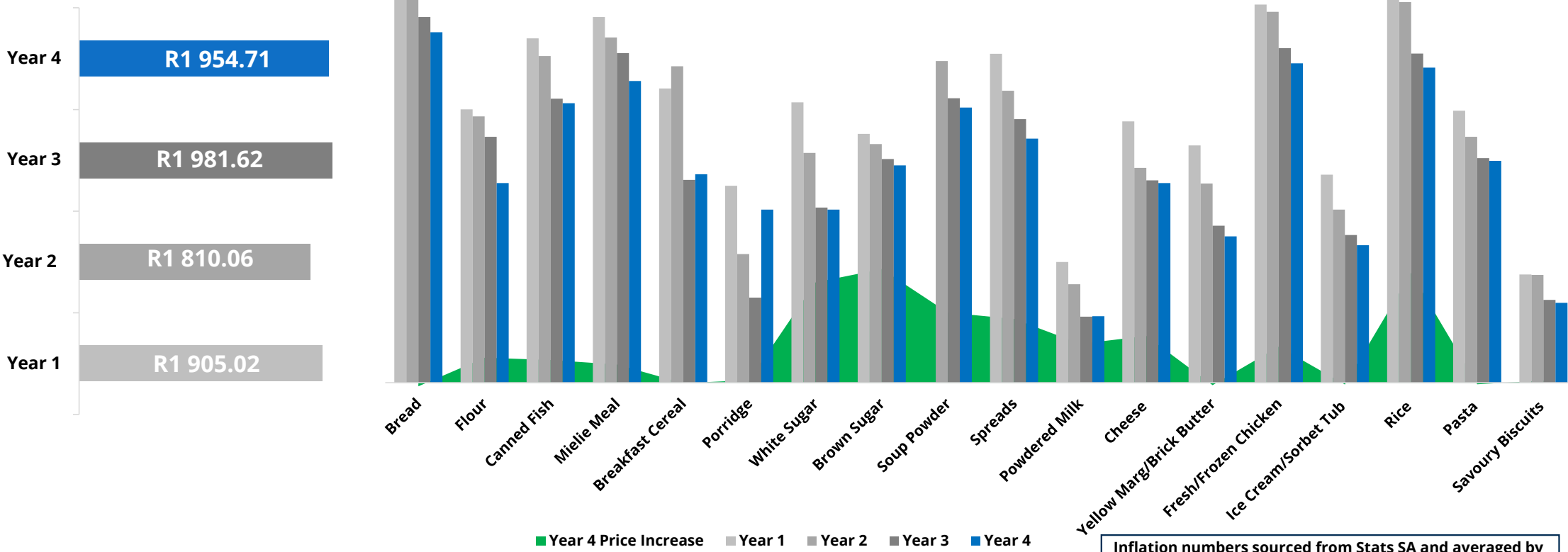
— Groceries, toiletries — Apparel (shoes, clothing and clothing accessories) - - - Inflation Rate

\*CPI Inflation rate figures provided by StatsSA (January 2024) \*apparel % decline

## Average Amount Spent on Groceries **only** per Month

## Food Items Bought Past 7 Days or Past 4 Weeks

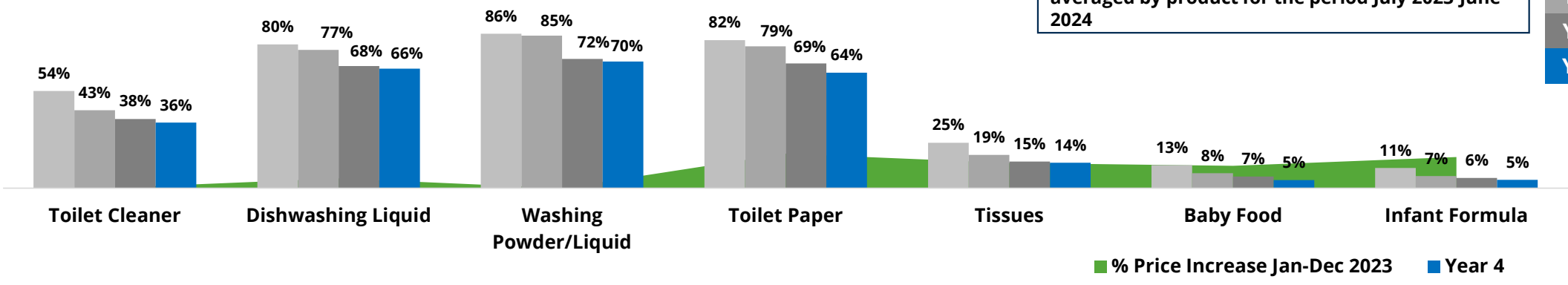
- Year 1
- Year 2
- Year 3
- Year 4



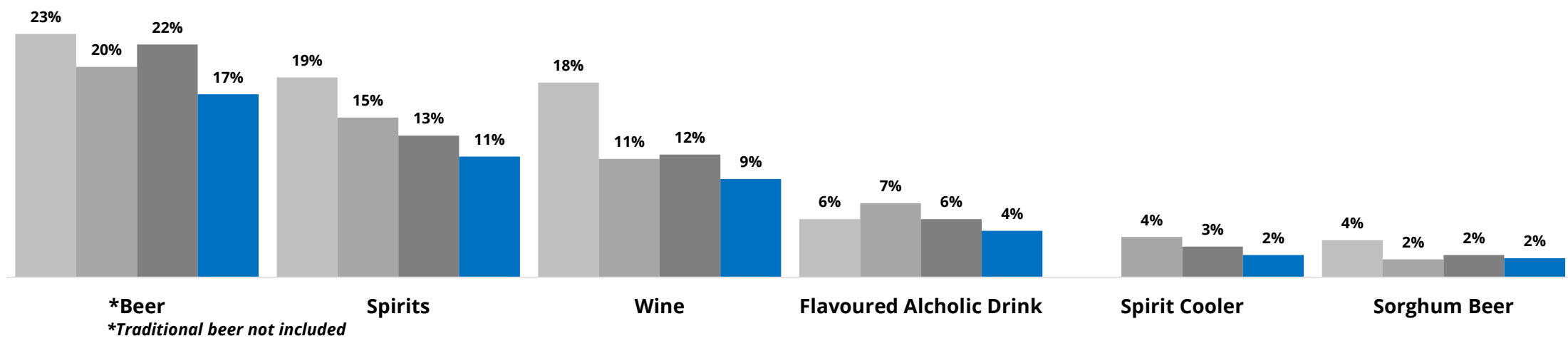
Inflation numbers sourced from Stats SA and averaged by product for the period July 2023-June 2024

## Household Goods Bought Past 4 Weeks

Inflation numbers sourced from Stats SA and averaged by product for the period July 2023-June 2024

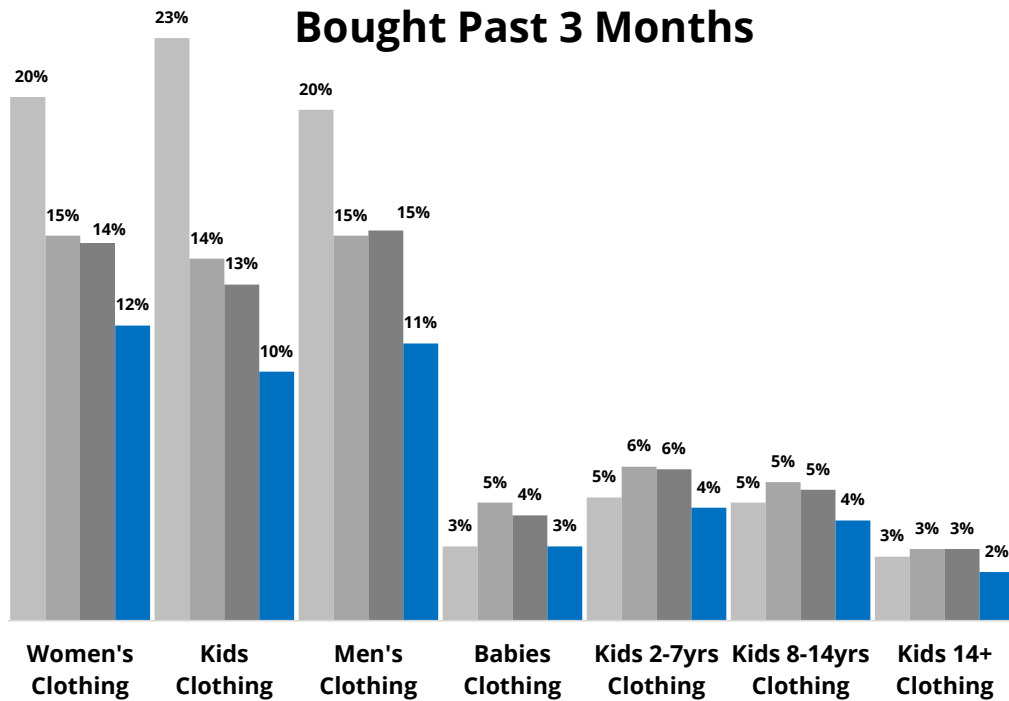


## Alcohol Consumed P7D

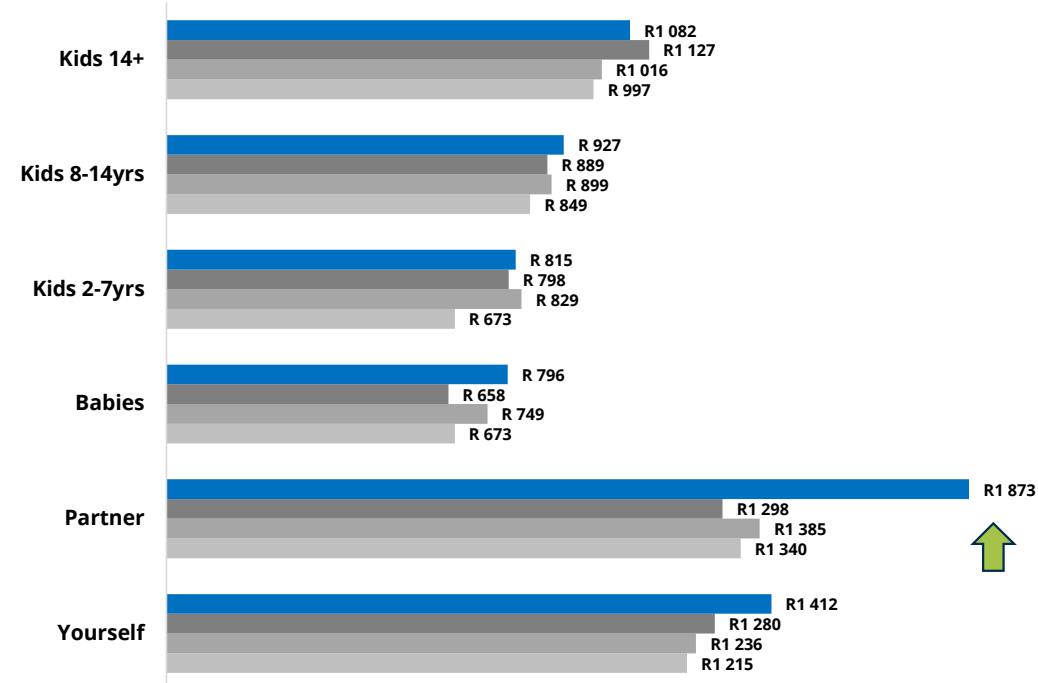


- Year 1
- Year 2
- Year 3
- Year 4

## Bought Past 3 Months



## Average Amount Spent on Clothing Only P12M



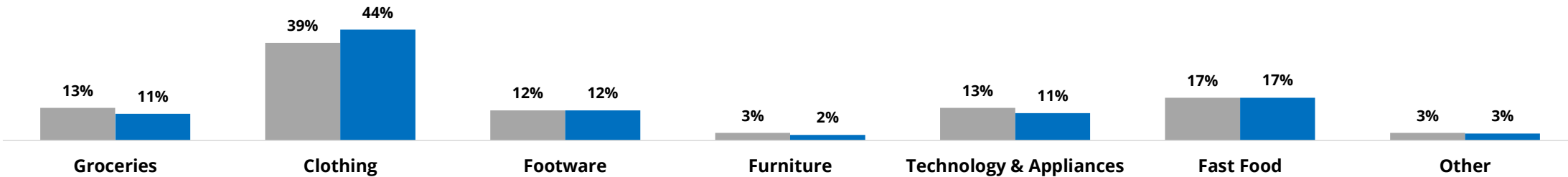


Within online clothing purchasing SHEIN is the retailer of choice

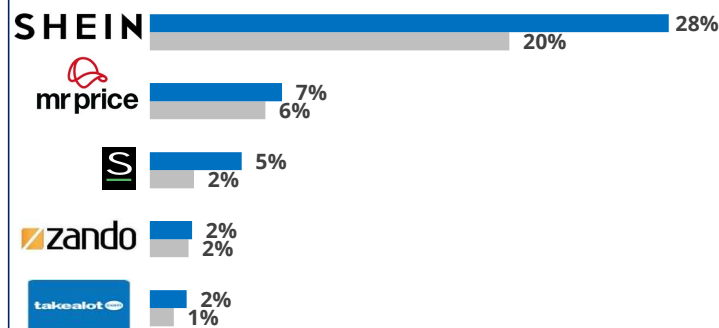
1,0m people purchased clothing online in the past month

Notes:  
Percentages rebased to Total Online Shopping Purchased P4W  
Question was discontinued in Q4 2024 so only 2 quarters of data included in Year 4

## Online Shopping: Purchased P4W

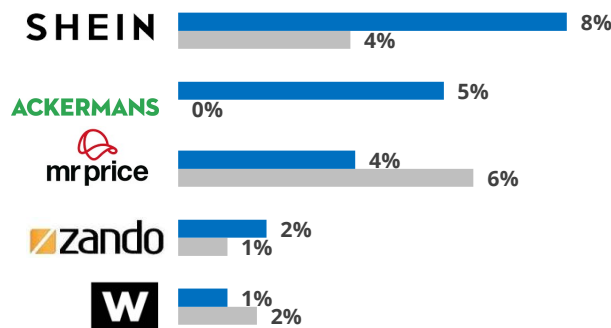


### Top Online Retailers: Women



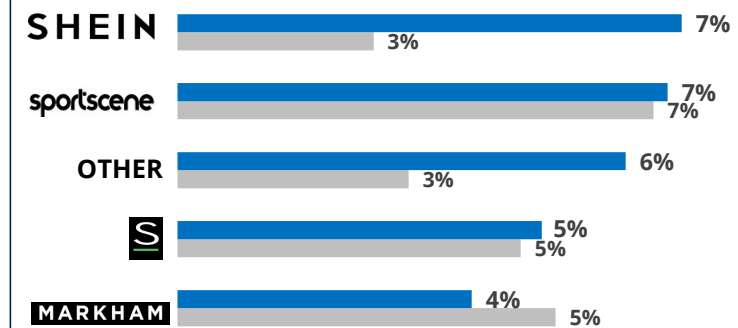
Filter: Online: How you purchased the items

### Top Online Retailers: Children



Filter: Online: How you purchased the items

### Top Online Retailers: Men



Filter: Online: How you purchased the items



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# Media Landscape

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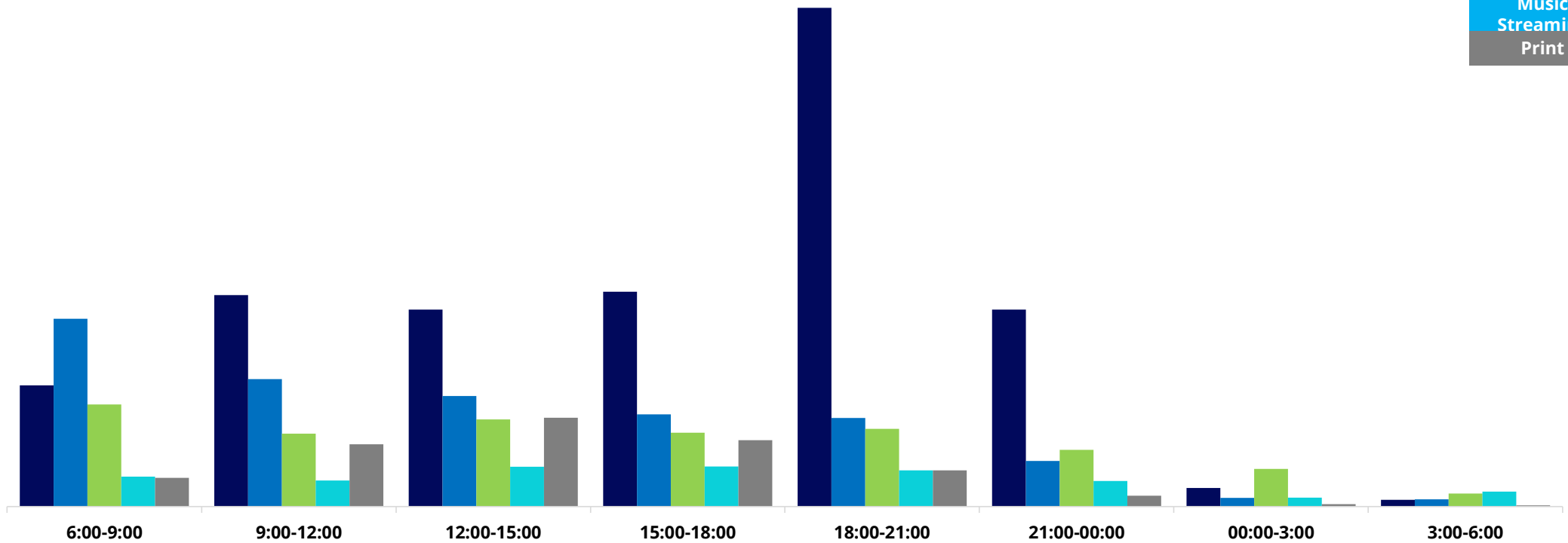


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# Popular Time Slots (Weekday)

2024 Popular Times Slots

- All TV
- Radio
- Social Media
- Music
- Streaming
- Print



\*Q1 '24 and Q2 '24 average

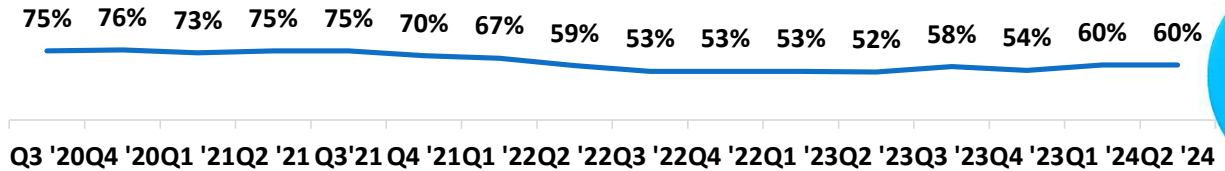
\*Print includes magazines and newspaper

**8.2M** people spend **more than 20 hours** per week watching TV.

## TOP 4 TV Channels Viewership

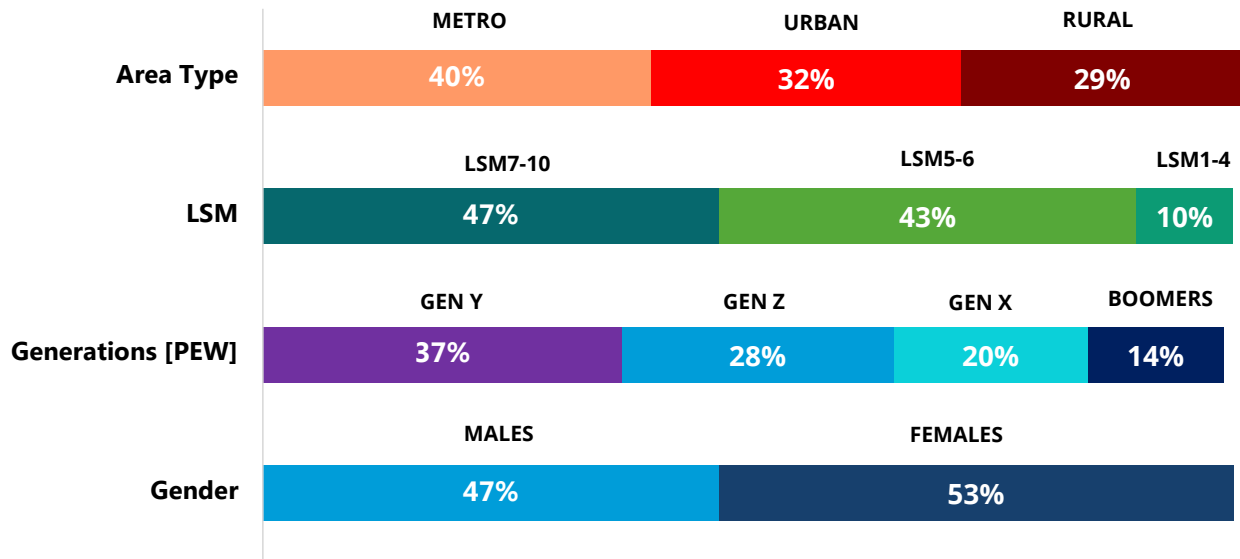
SABC 1	10.2M Watched P7D	↓
e	8.3M Watched P7D	↓
SABC 2	6.0M Watched P7D	↓
SABC 3	4.8M Watched P7D	↑

## Watched TV\*P7D



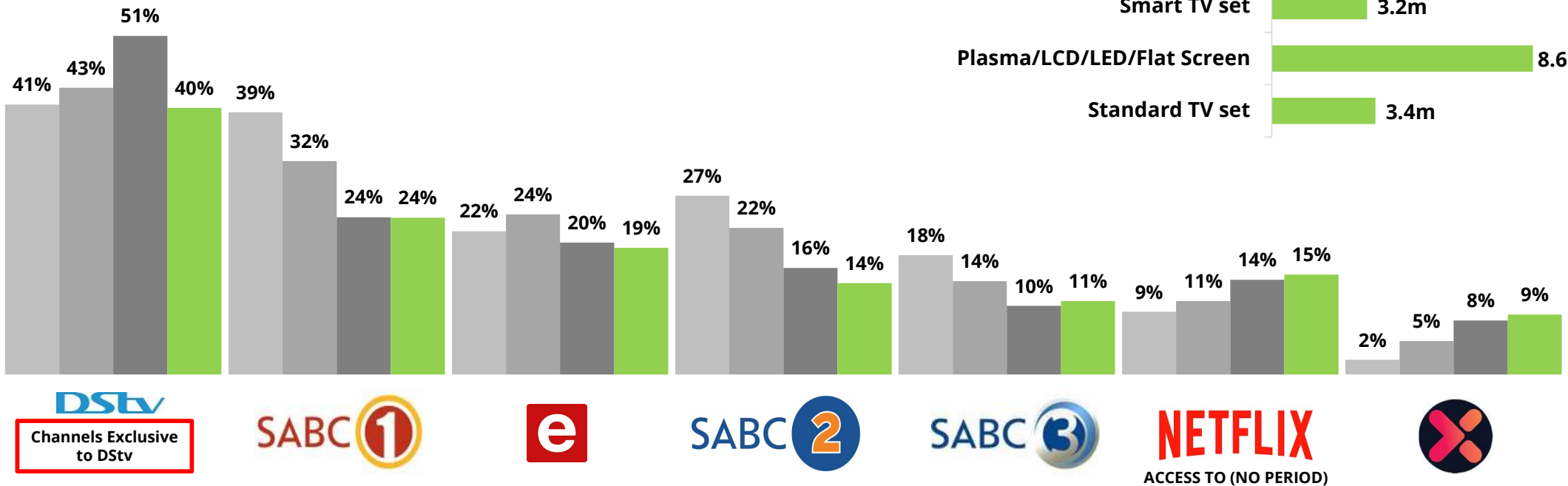
Television (P7D) Penetration **58%**

DSTV (P7D) Penetration **40%**



TV Penetration\* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on N = 25 136 302

74% of HH own TV sets



**DStv**  
Channels Exclusive to DStv

SABC 1

e

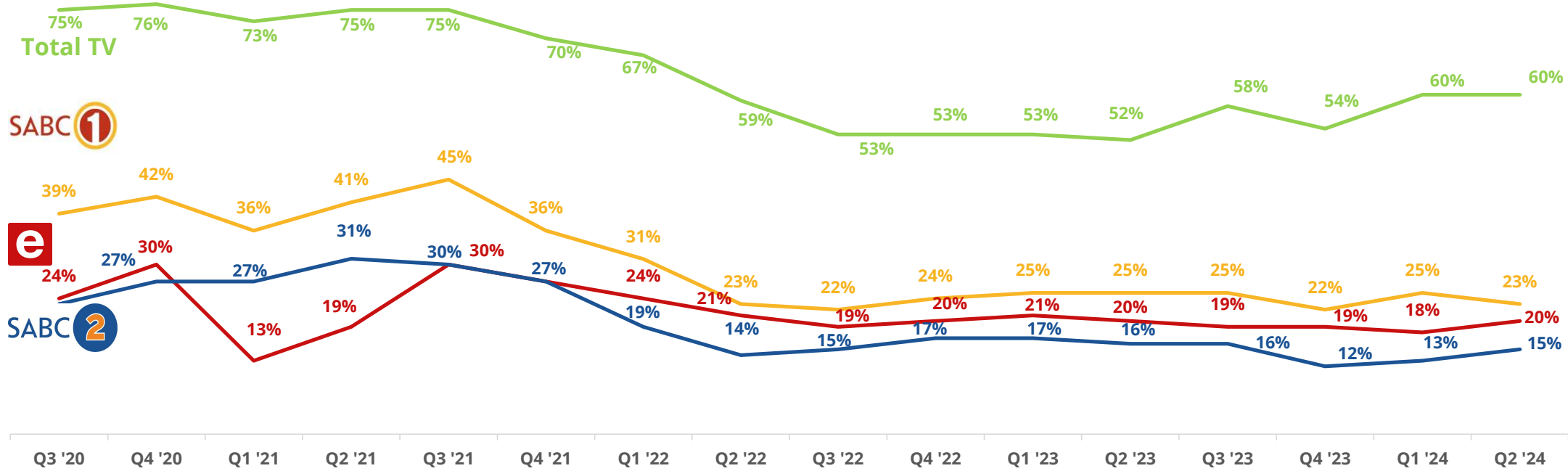
SABC 2

SABC 3

**NETFLIX**  
ACCESS TO (NO PERIOD)



TV Channel Audience P7D



**8.4M** people have access to on-demand streaming services.

## Top 3 Streaming services

**NETFLIX**

Access to Netflix   
**6.7M**



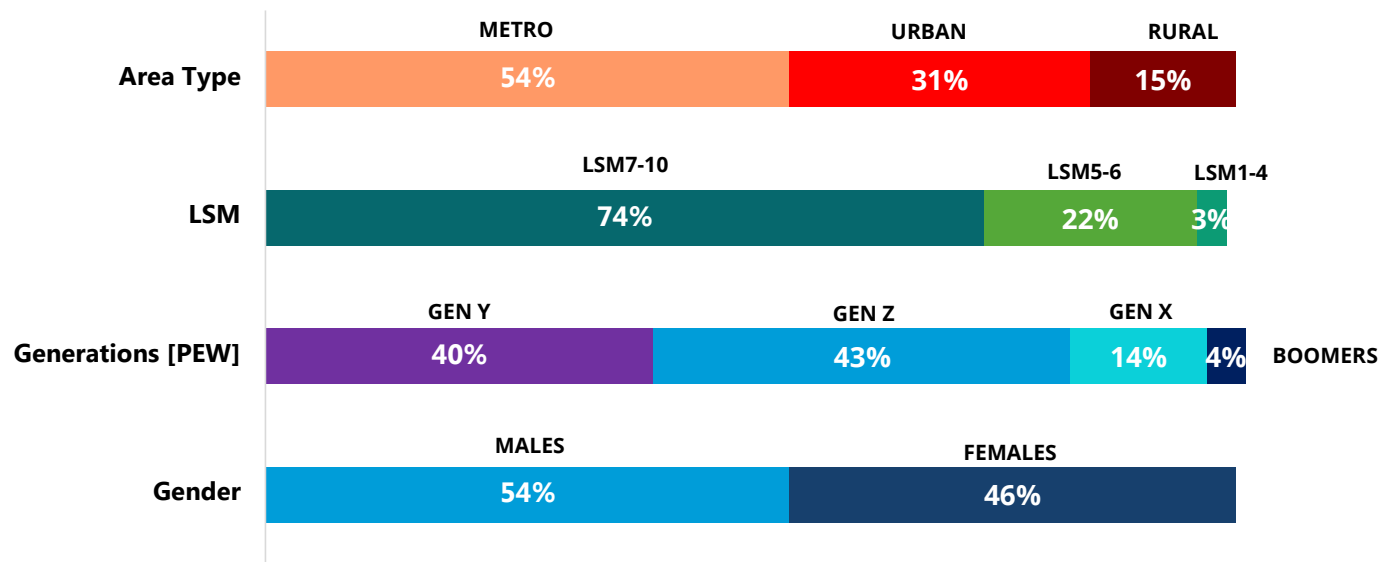
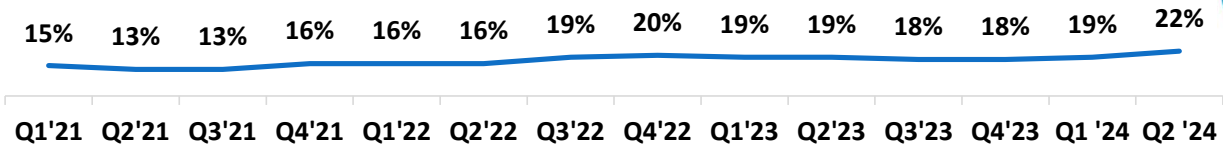
Access to Showmax   
**4.0M**



Access to YouTube (PAID)   
**898K**

## On-demand streaming

Annual Streaming Penetration  
**19%**



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 = 8 072 102.

**12.8M** people watched video content in the P7D

## Top 3 Social Media Sites P7D

facebook

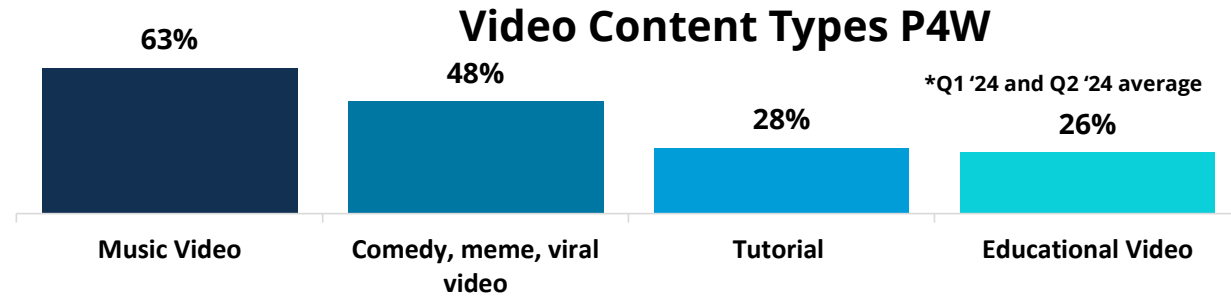
Visited Facebook  
**23.7M**



Visited TikTok  
**8.7M**

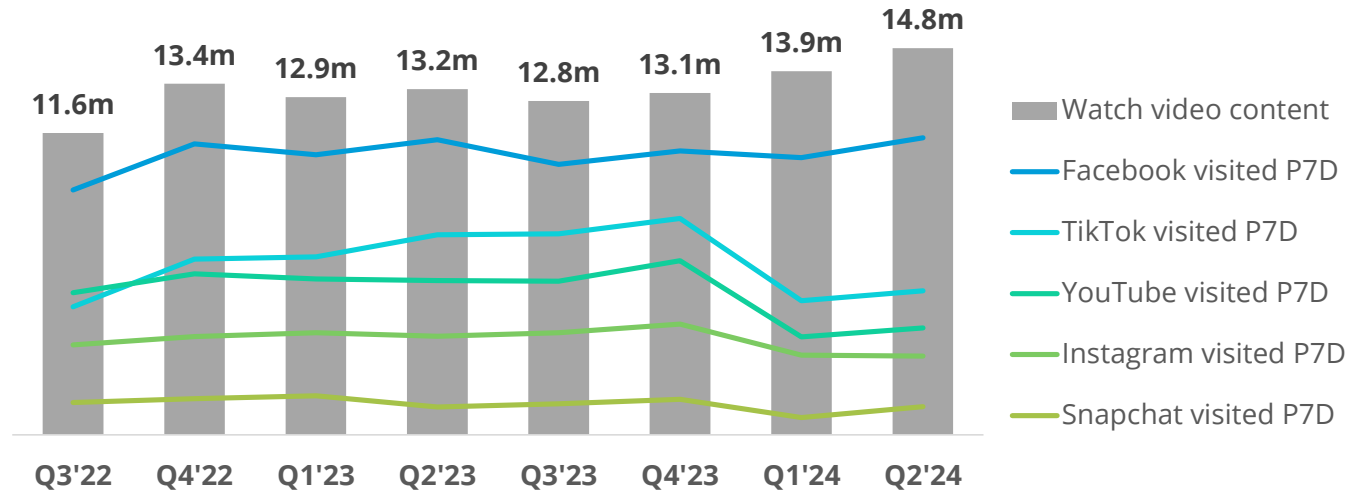


Visited YouTube  
**7.8M**



Watched Video Content Per  
**35%**

## Filter: Video Content Viewed

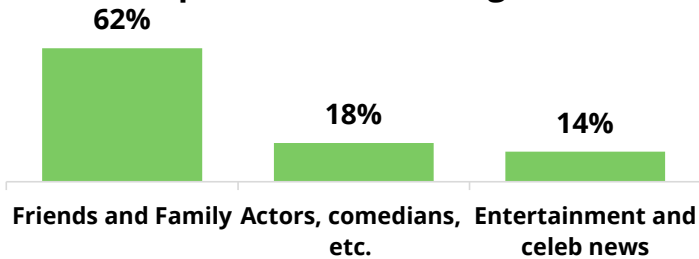




**13M** South Africans spend **more than 20 hours** per week on social media.

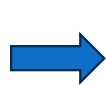
**\*40K** South Africans follow **influencers and other experts** on social media.

### \*Top 3 Social Media Pages followed



\*Average of Q1 '24 and Q2 '24

### P4W: TOP 3 SOCIAL MEDIA PLATFORMS



29M↑

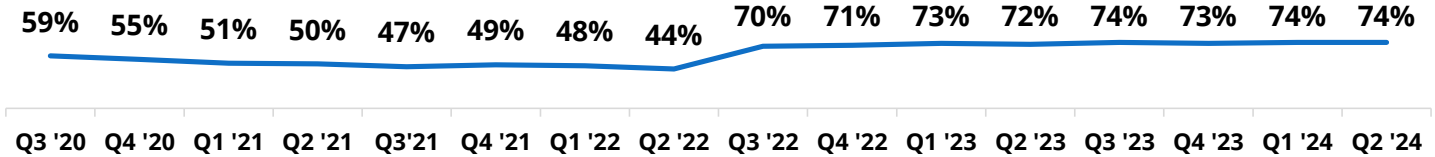
facebook 26M↑



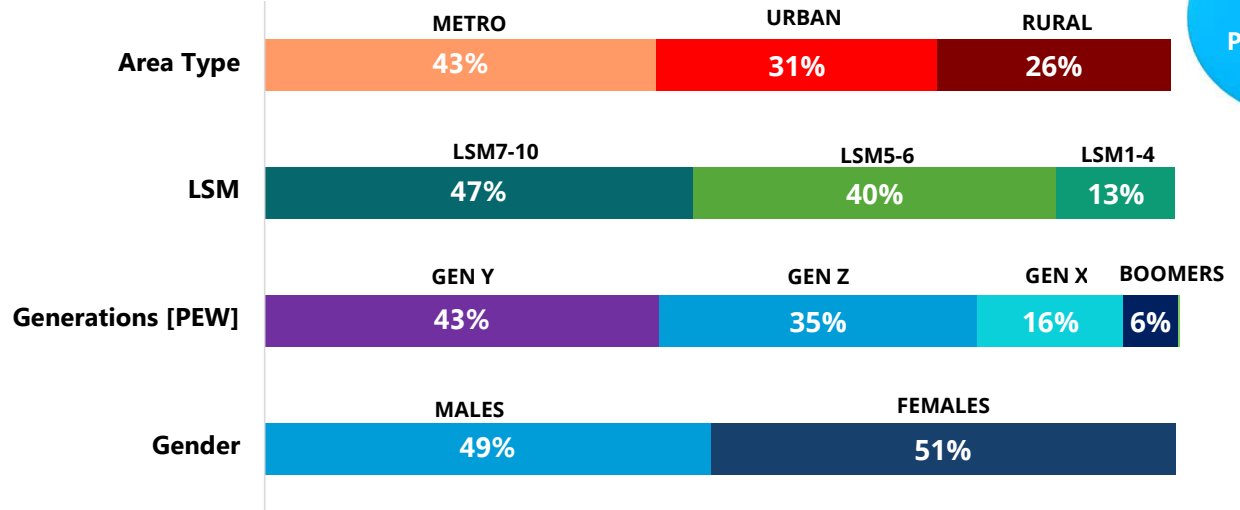
TikTok 12M↑

N = 31 960 259

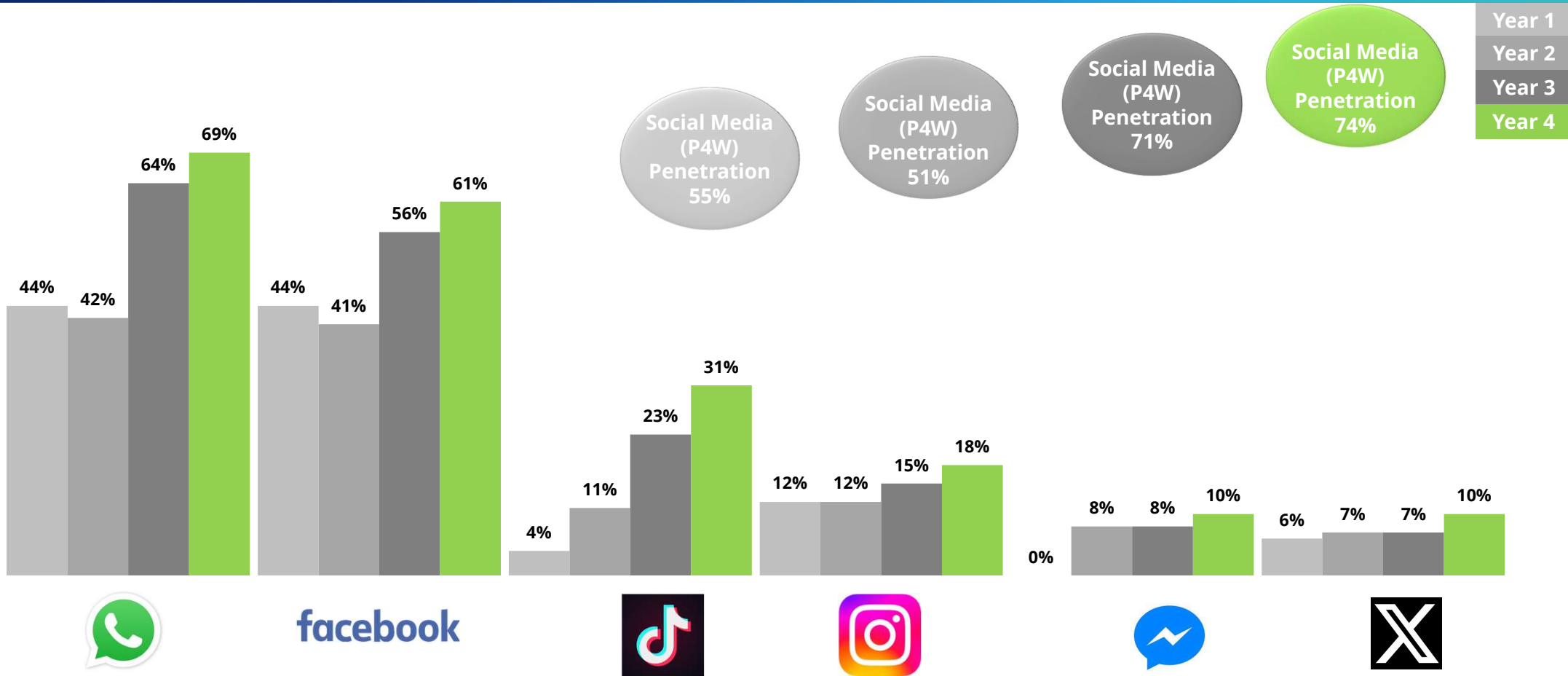
### Social Media\* P4W



Social Media (P4W) Penetration **74%**

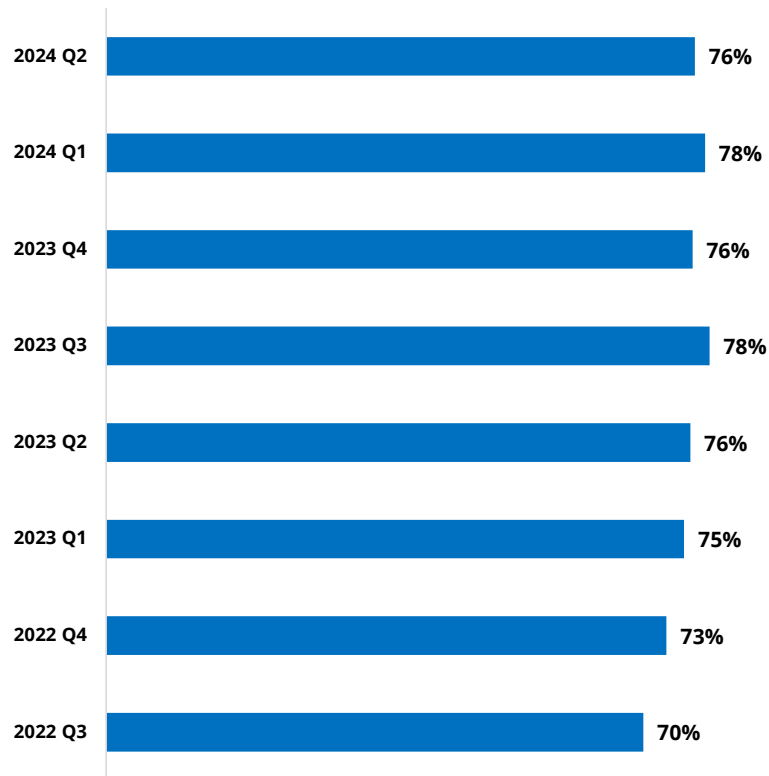


# Social Media Shifts: % Pop YoY

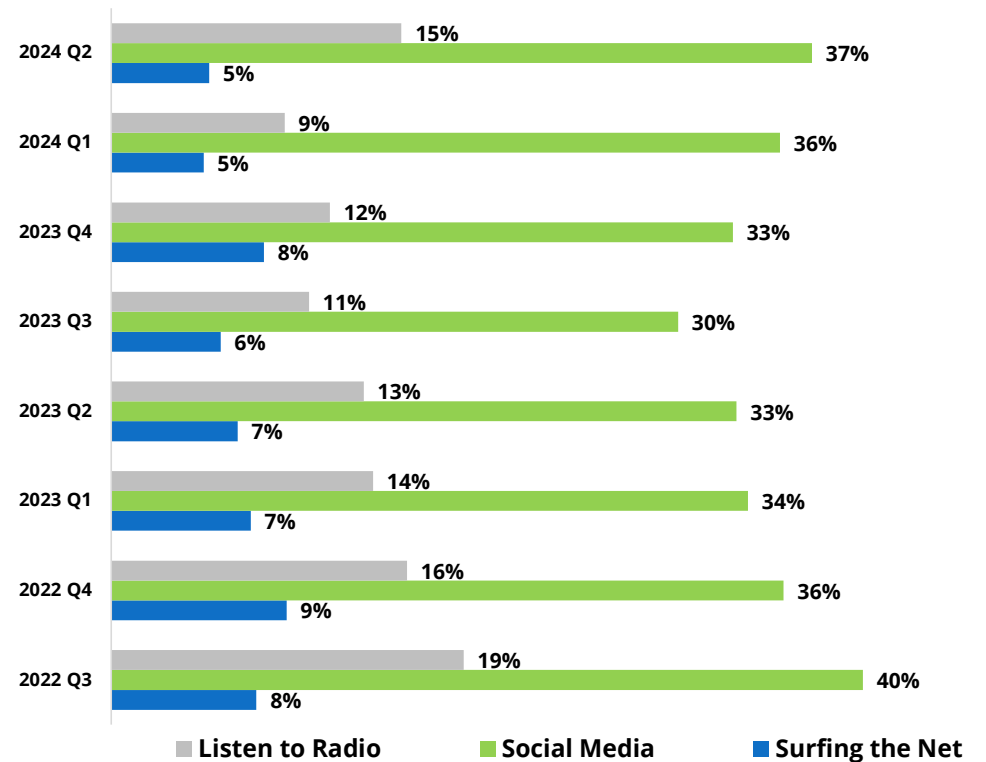


Year 1
Year 2
Year 3
Year 4

Accessed the Internet in the Past 7 Days

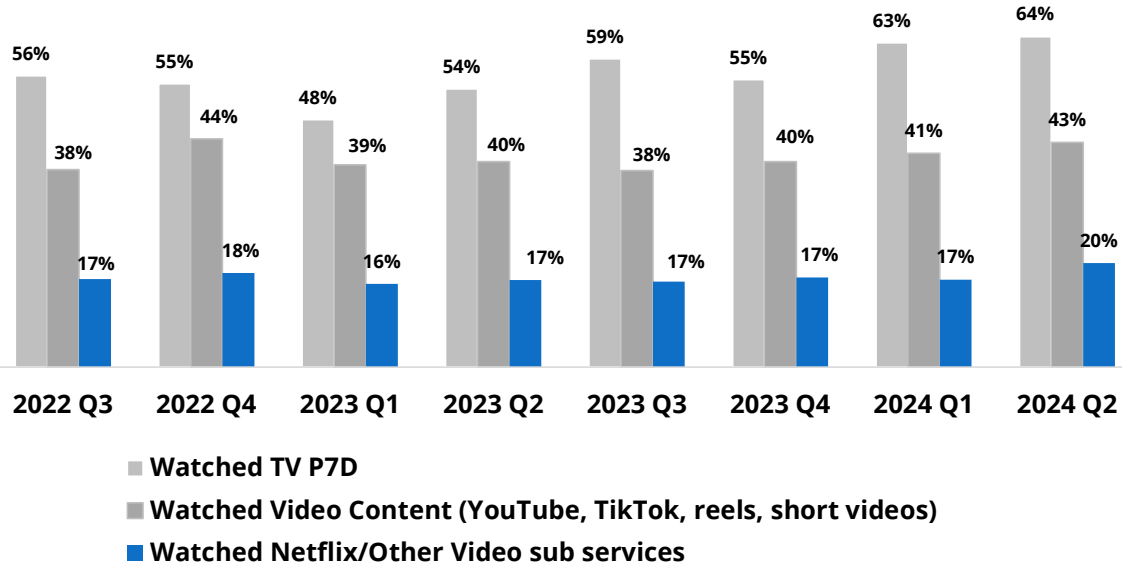


Multiplatform Behaviour  
Other Activities While Watching TV



## Total Population Video Content Viewing P7D

Filter: Accessed Internet P7D

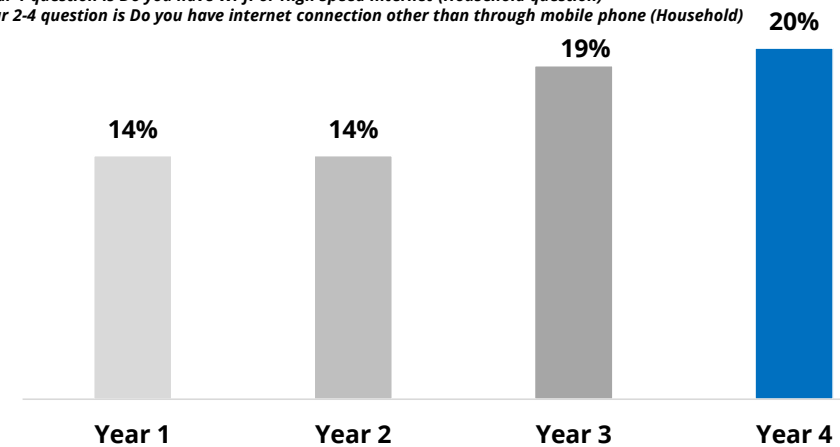


## Internet Connection in the Home

Notes:

Year 1 question is Do you have Wi-fi or High Speed Internet (Household question)

Year 2-4 question is Do you have internet connection other than through mobile phone (Household)



3.9m Households now have fixed internet access, an increase of 64% increase between Year 2 and Year 4

88% of people who watched video content visited these social media platforms in the past seven days.



# RADIO LANDSCAPE (P7D)

**6.1M** spend more than 20 hours per week listening to the radio

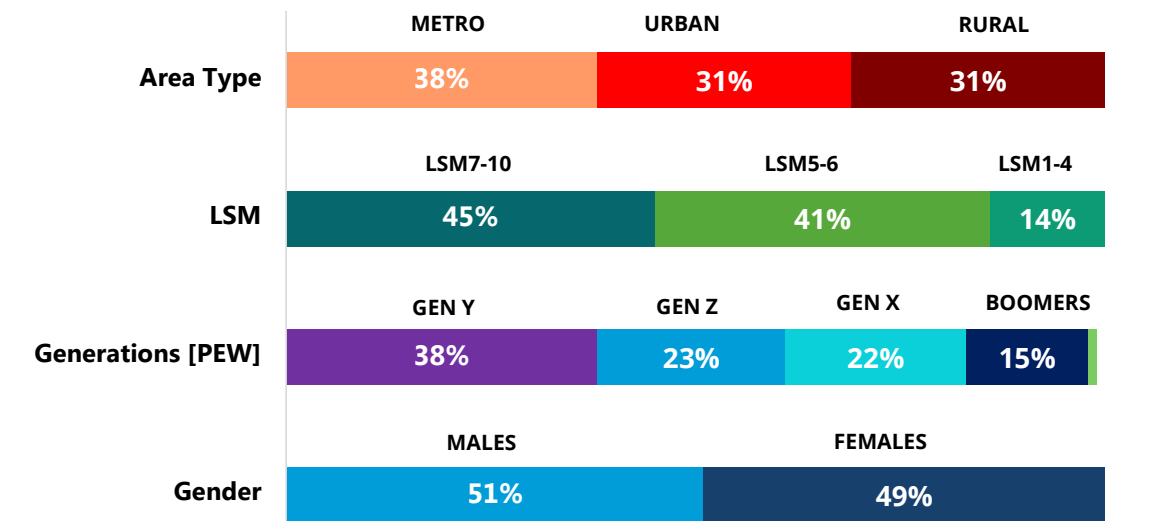
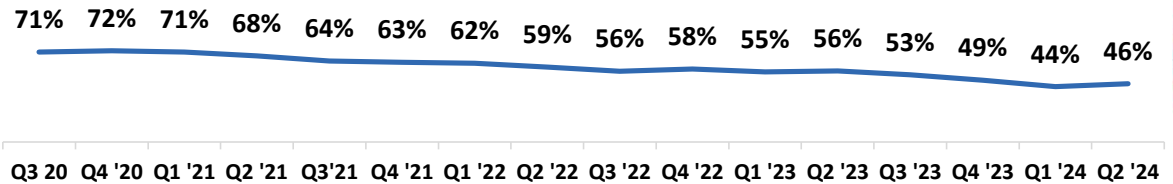
**1.1M** spend more than 20 hours per week listening to a podcast

**18M** listened to Commercial Stations (P7D)

**4M** listened to Community Stations (P7D)

**53K** listened to Internet radio stations (P7D)

Listened to radio stations\*P7D



Radio (P7D) Penetration **48%**

Audio streaming (Ave. Week) Penetration **6%**

Podcast (Ave. Week) Penetration **3%**

**P7D: TOP 5 Radio Stations**



**P7D 3.7M**



**P7D 2.3M**



**P7D 2.0M**



**P7D 1.9M**



**P7D 1.7M**

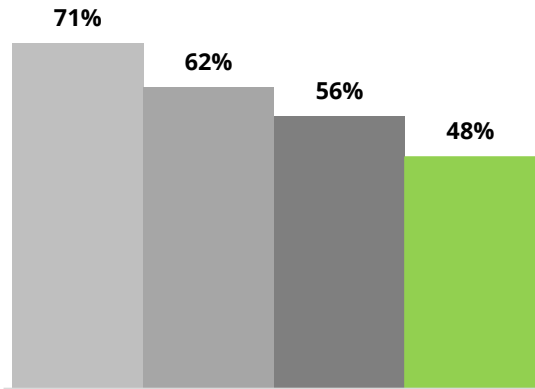
Radio Penetration\* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on N = 20 767 693.

n=20 767 693

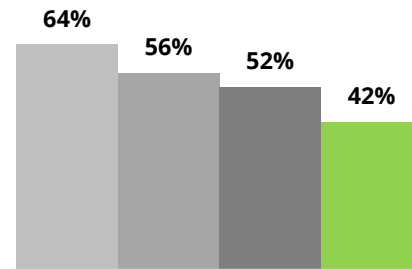
# TOP 5 RADIO STATIONS P7D: % POP YOY

- Year 1
- Year 2
- Year 3
- Year 4

## Radio Category: Past 7 Days



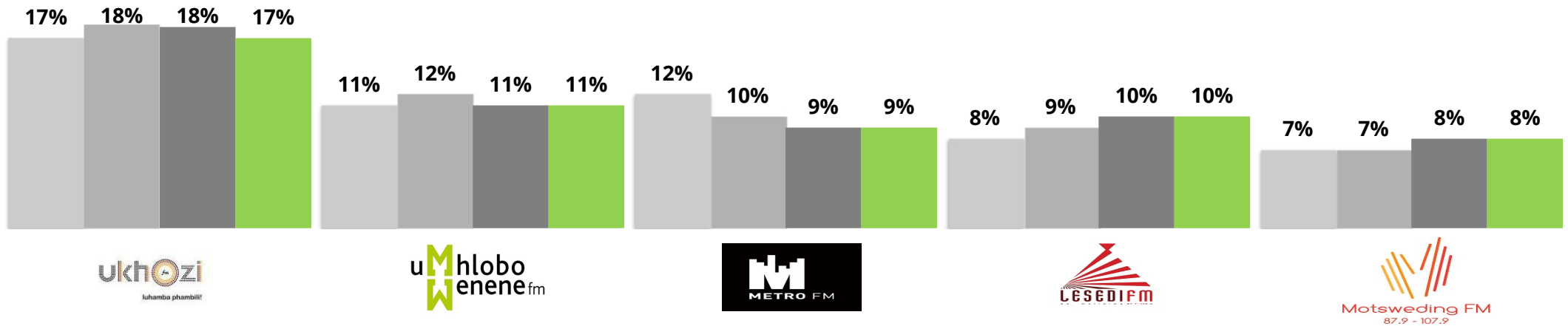
All Radio



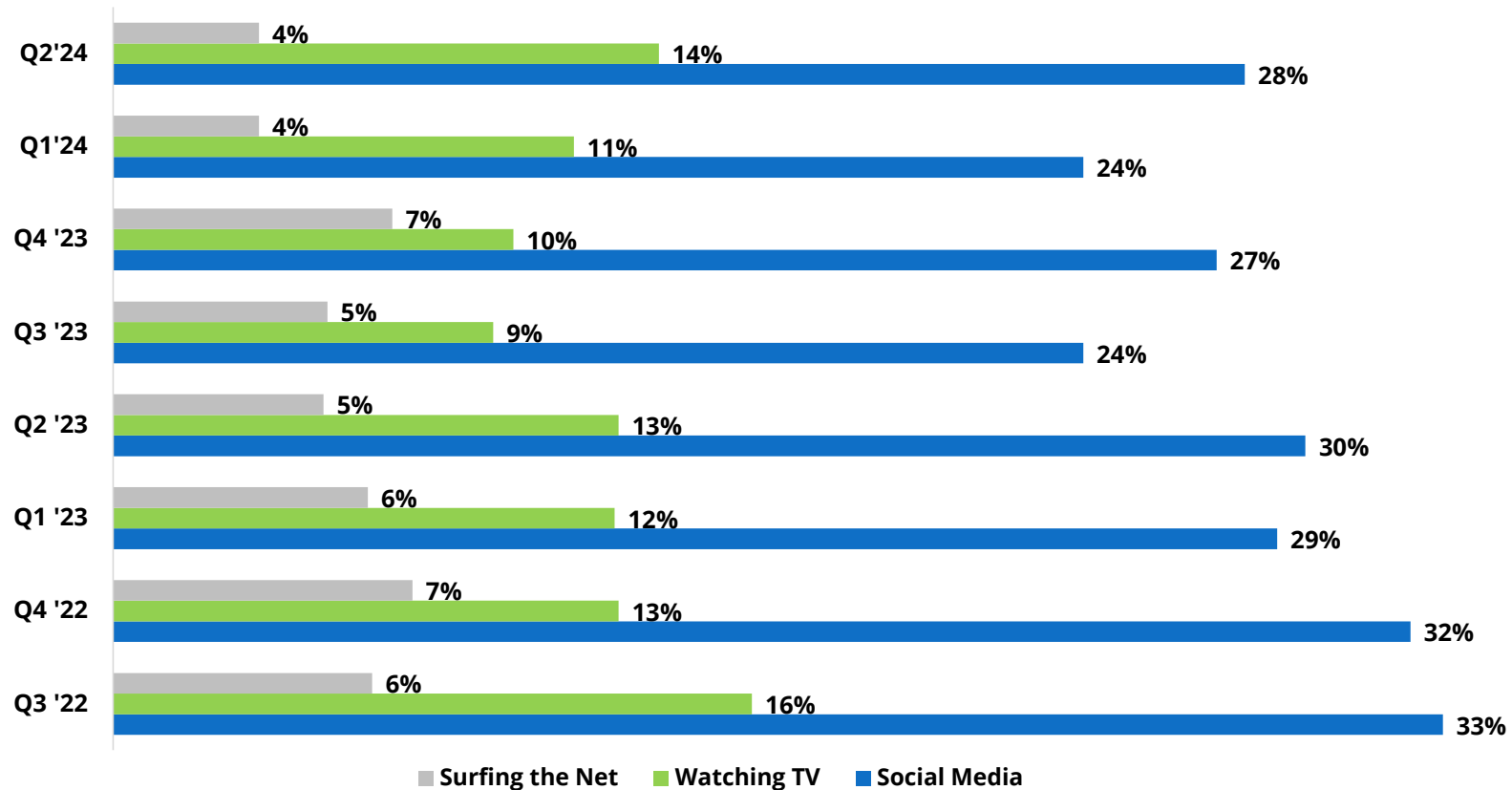
Commercial



Community



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

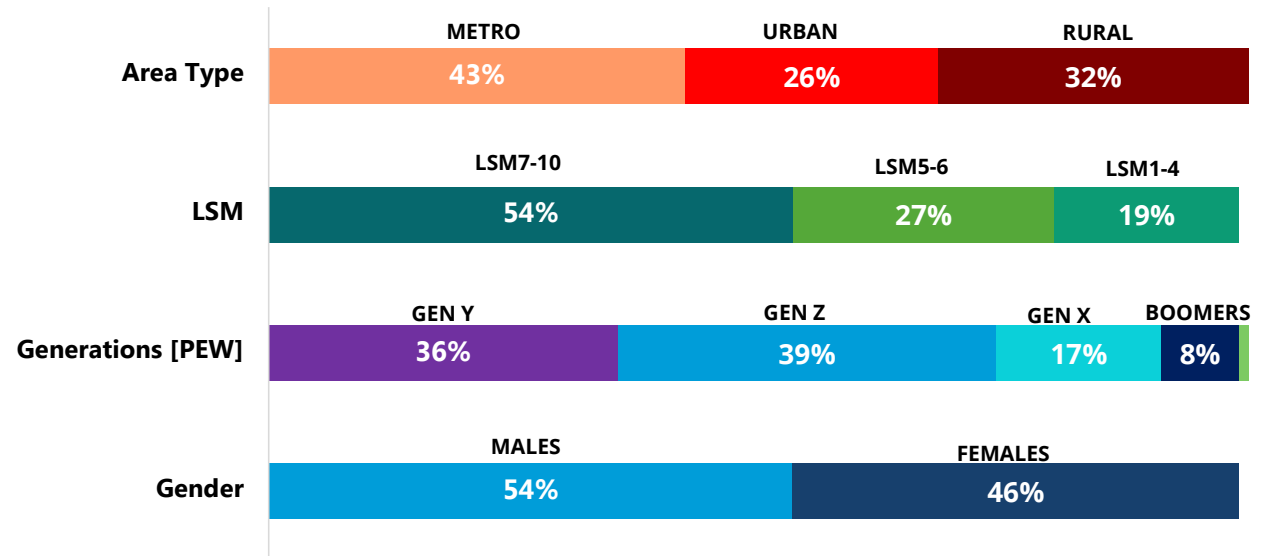


# Audio Streaming Landscape

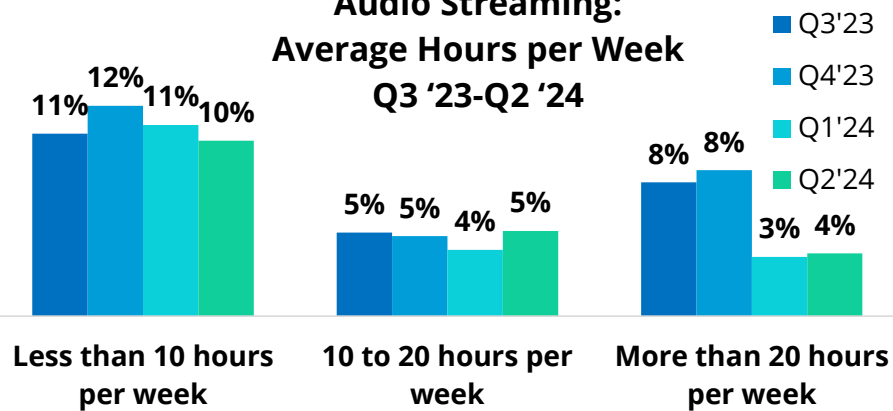
**12.3M** people have access to audio online streaming services.

**6%** people stream audio weekly.

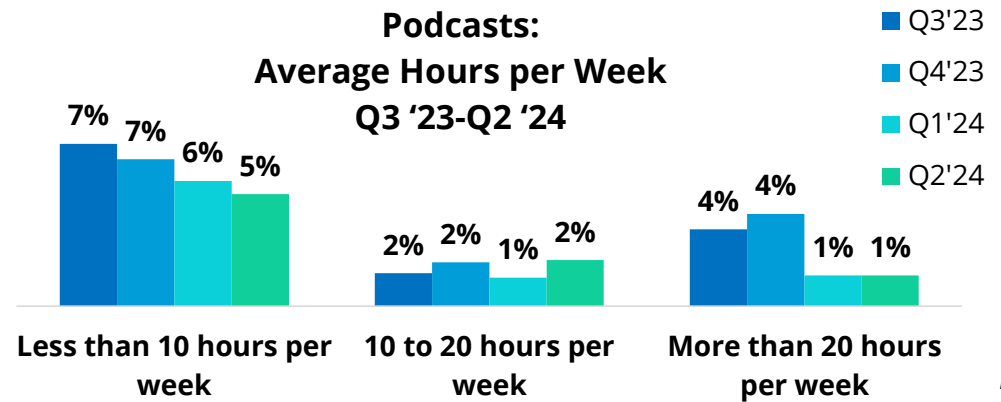
**3%** people stream podcasts weekly.



Audio Streaming: Average Hours per Week Q3 '23-Q2 '24



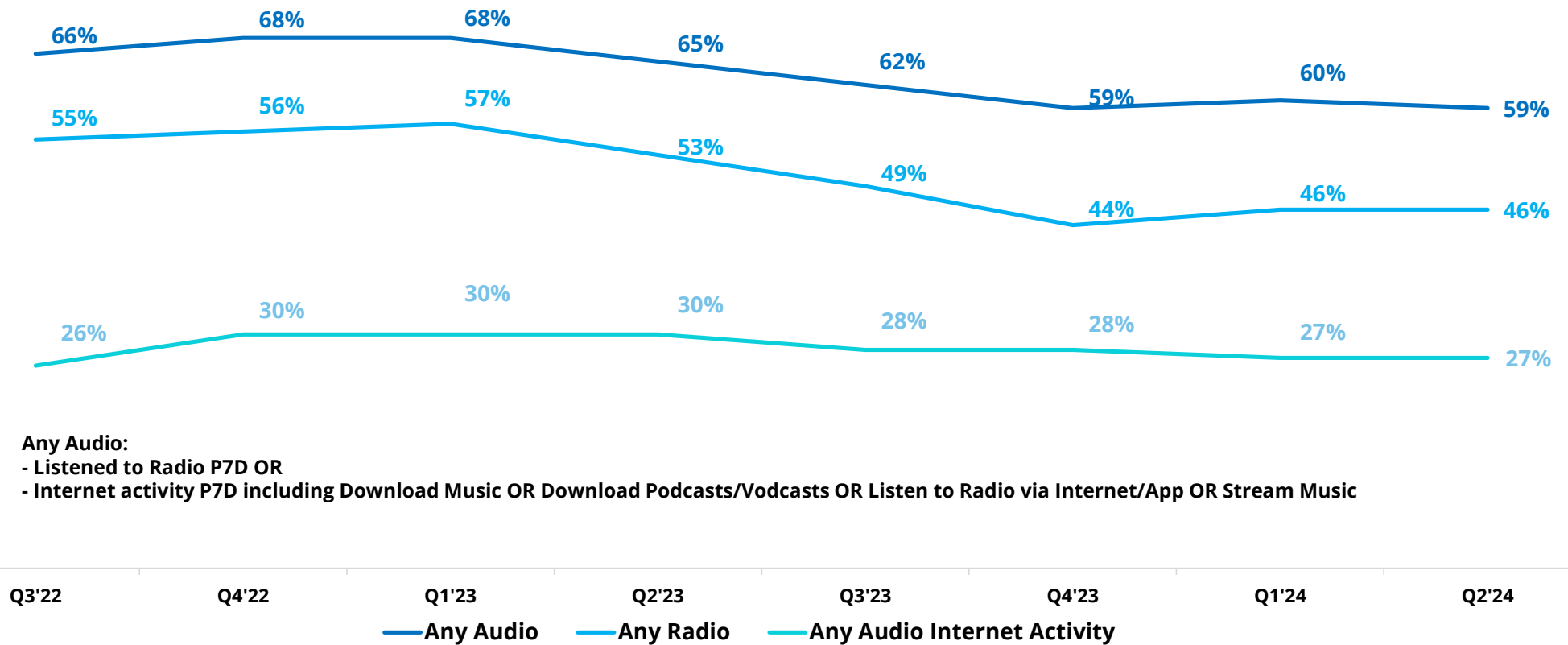
Podcasts: Average Hours per Week Q3 '23-Q2 '24



N = 2 513 805



## Any Audio Listening P7D

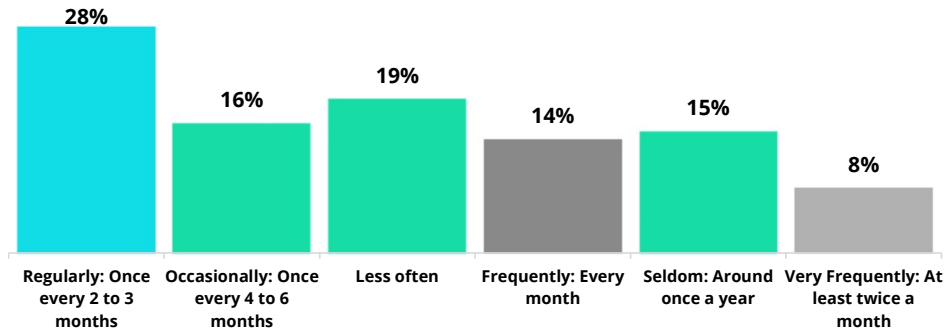


**562K** people regularly go to the Cinema once every 2 to 3 months.



**R430** average cinema outing cost.

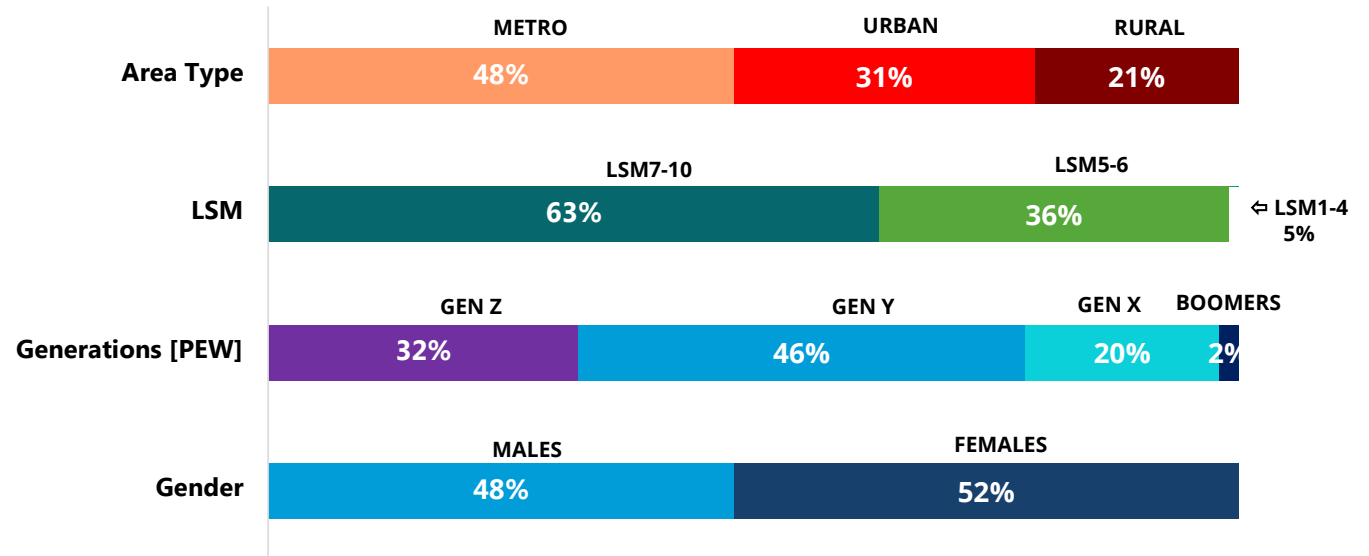
Cinema (P4W) Penetration **2%**



### TOP 4 Cinema Chains Visited

	<b>863K</b> Visited most often	↓
	<b>733K</b> Visited most often	↓
	<b>196K</b> Visited most often	↓
	<b>58K</b> Visited most often	↓

Cinema Penetration\* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on N = 94 264

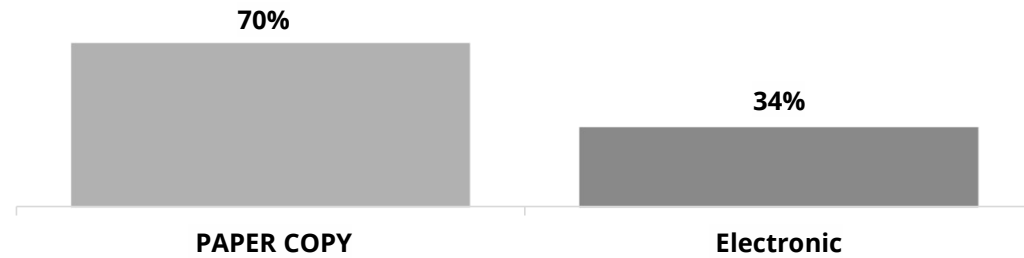


N= 862 525

**3.7M** people read magazines in the past 3 months.

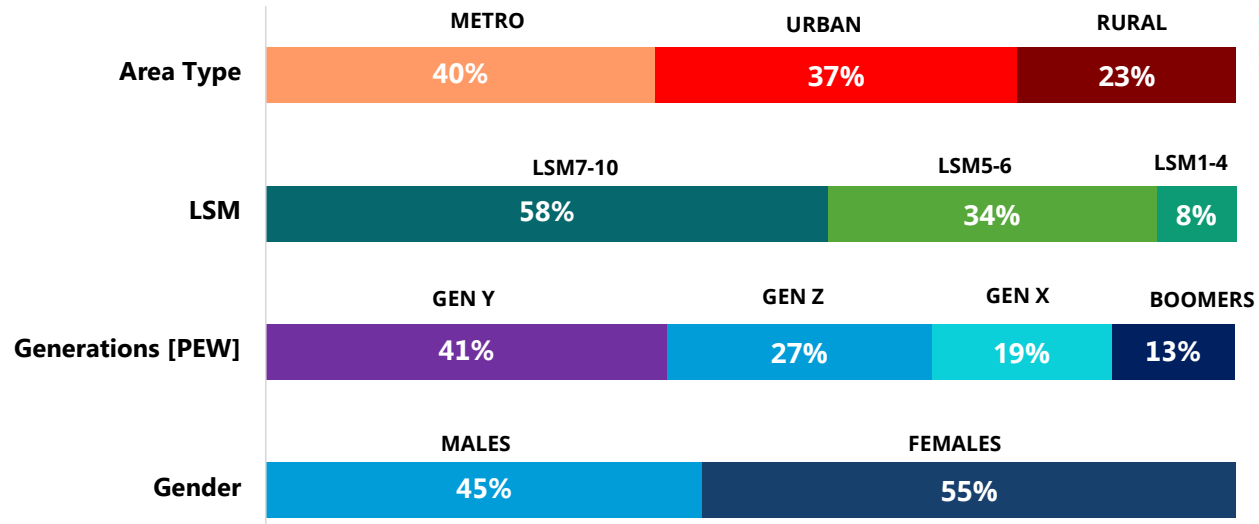
## Top 4 Magazines

<b>DRUM</b>	1.3M Read P3M	↓
<b>HUISgenoot</b>	461K Read P3M	↓
<b>YOU</b>	446K Read P3M	↓
<b>Kuier</b>	271K Read P3M	↑



Magazine (P3M) Penetration 9%

Magazine AIR (ANY) Penetration 5%







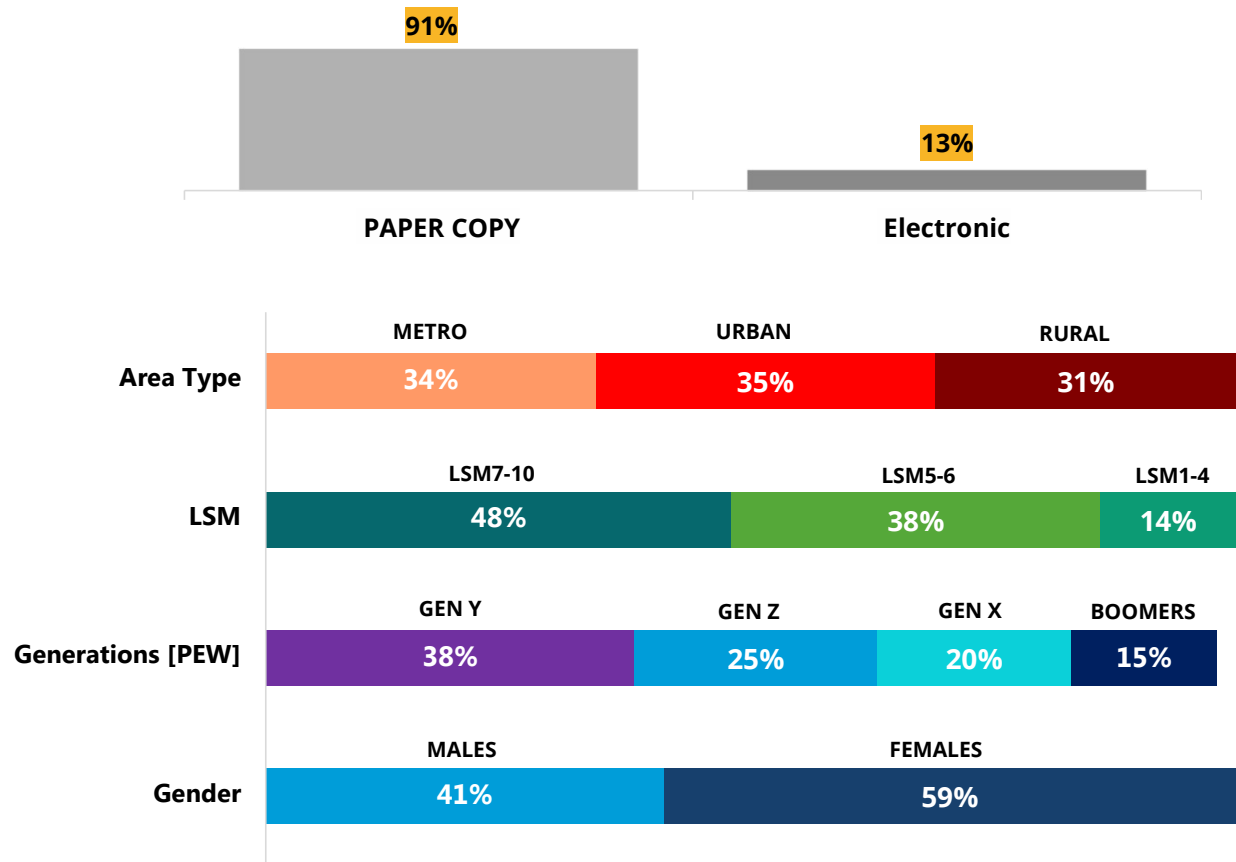
Magazine Penetration\* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on N = 3 736 287.

N = 3 736 287

**5.2M** people read store magazines in the past 3 months.

## Top 4 Store Magazines

	<b>1.3m</b> Read P3M
	<b>1.3m</b> Read P3M
	<b>1.2m</b> Read P3M
	<b>0.6m</b> Read P3M



Magazine AIR Penetration (ANY) 5%

Store Magazine (P3M) Penetration 12%

Magazine Penetration\* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on N = 3 736 287.

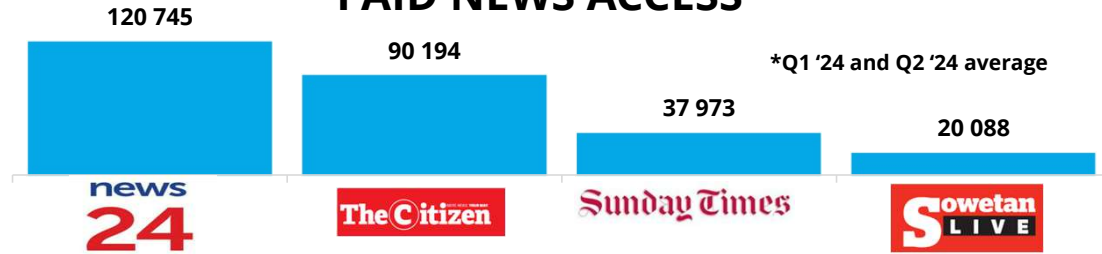
N = 3 736 287

**10.7M** people read Newspapers in the past 3 months.

## Top 4 Daily Newspapers

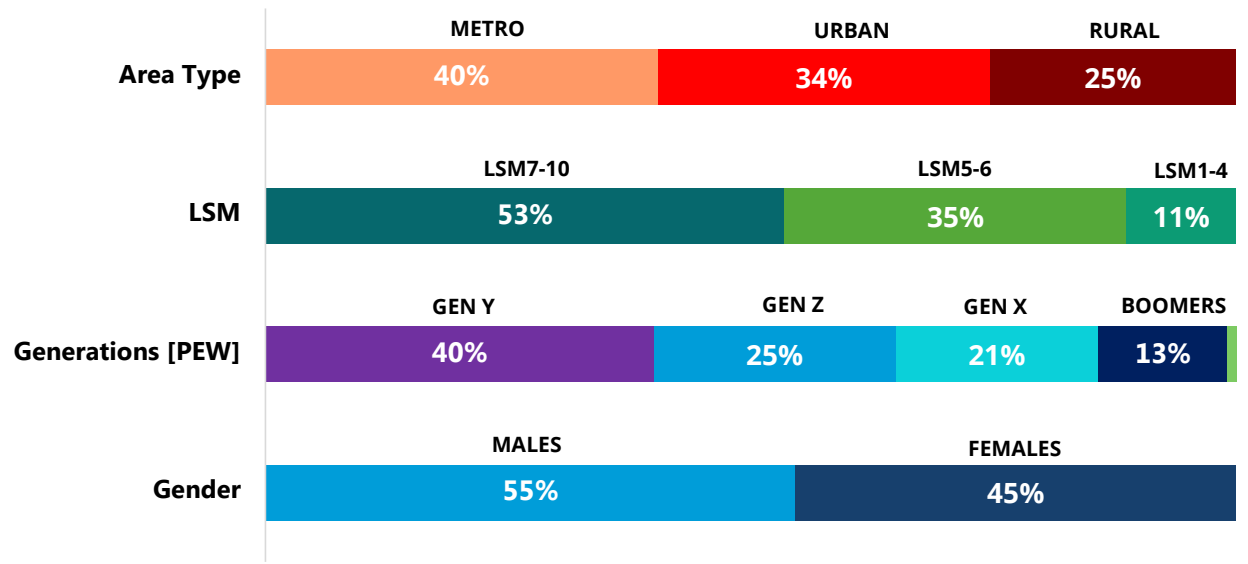


## PAID NEWS ACCESS



Newspaper (P3M) Penetration 25%

Newspaper AIR (ANY) Penetration 8%

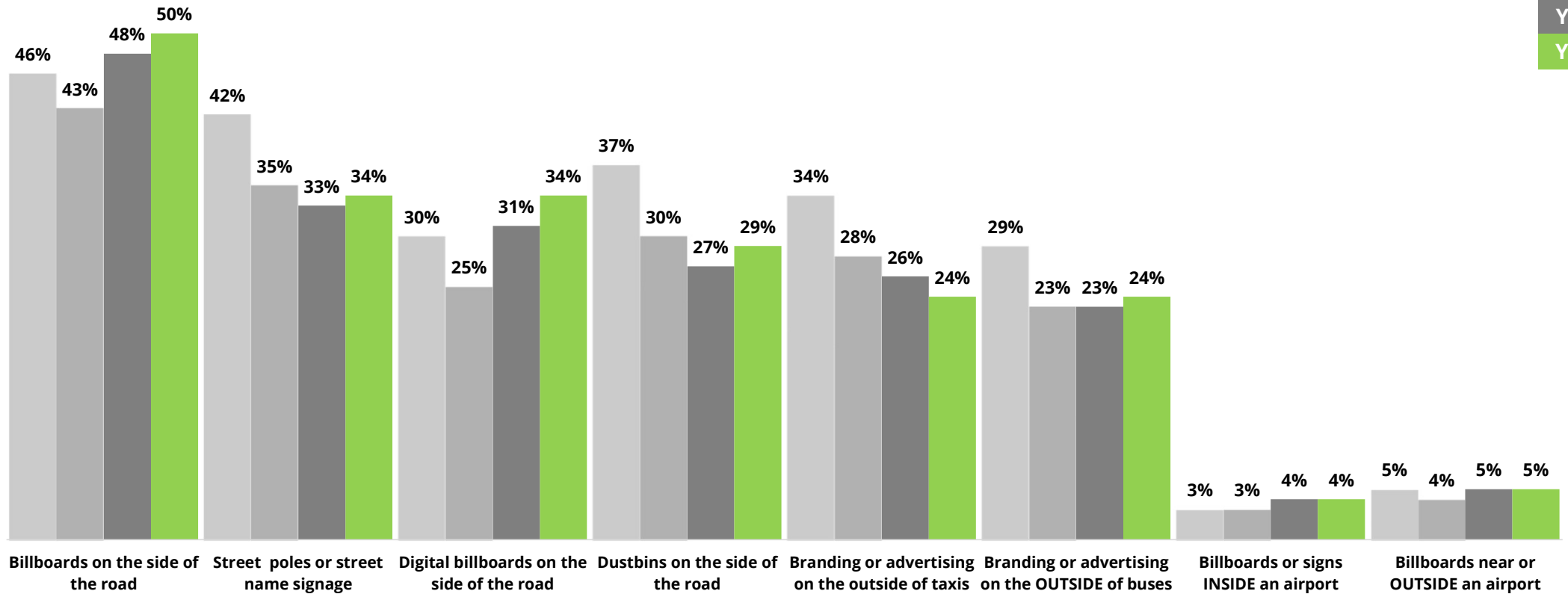


Newspaper Penetration\* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on N = 10 692 385.

N = 10 692 385

# OUT OF HOME P4W SHIFTS: % POP YOY

Year 1  
Year 2  
Year 3  
Year 4





MARKETING RESEARCH  
FOUNDATION

# Financial Services

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**PLUS 94**  
**RESEARCH**



**72%** have a bank account excluding the SASSA accounts



**10%** have medical aid cover

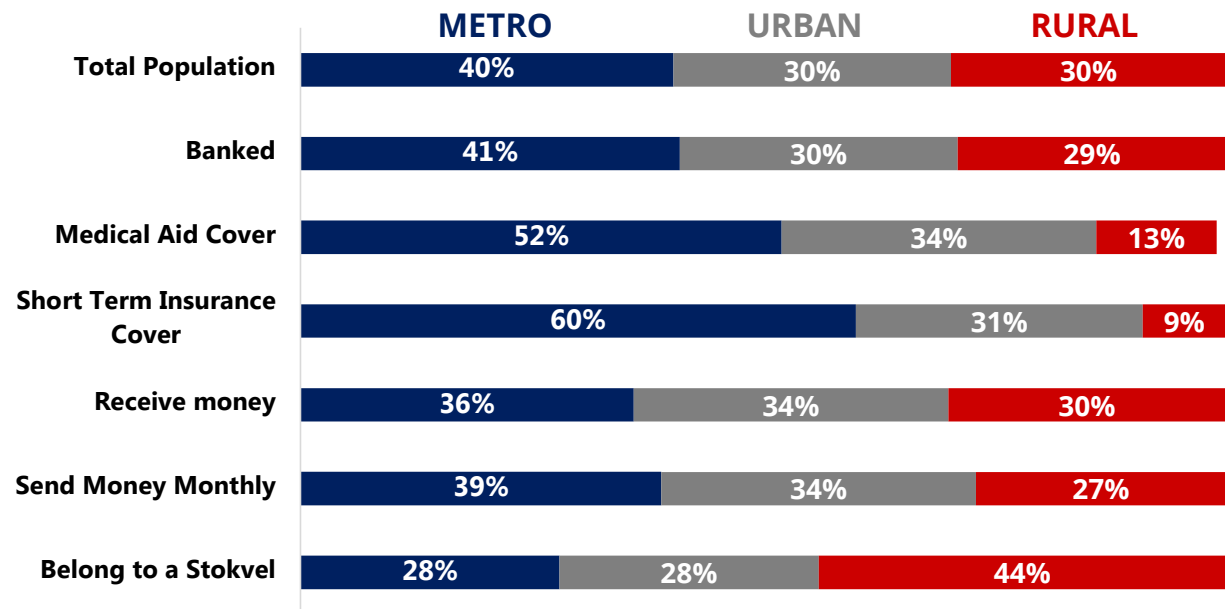


**35%** are insured

**31%** have funeral insurance or policy

**3%** have short term insurance.

## Distribution by Area

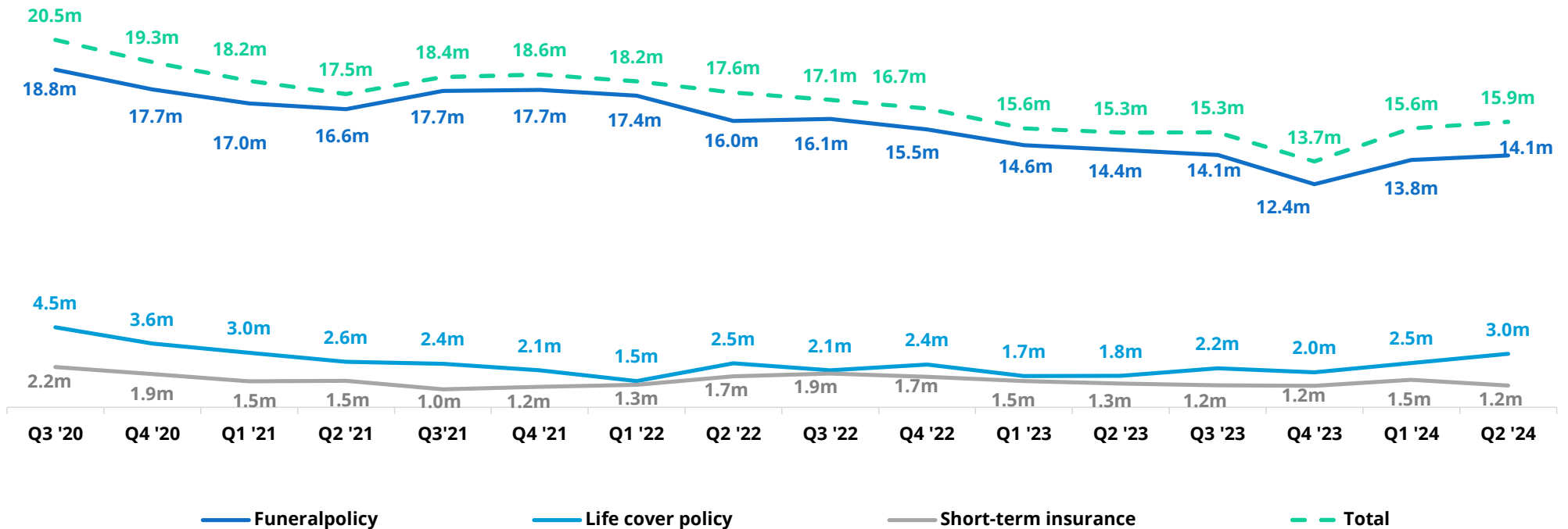


**22%** transfer or send money to family or friends monthly. On average **R1086** is sent.

**8.4%** belong to a stokvel.

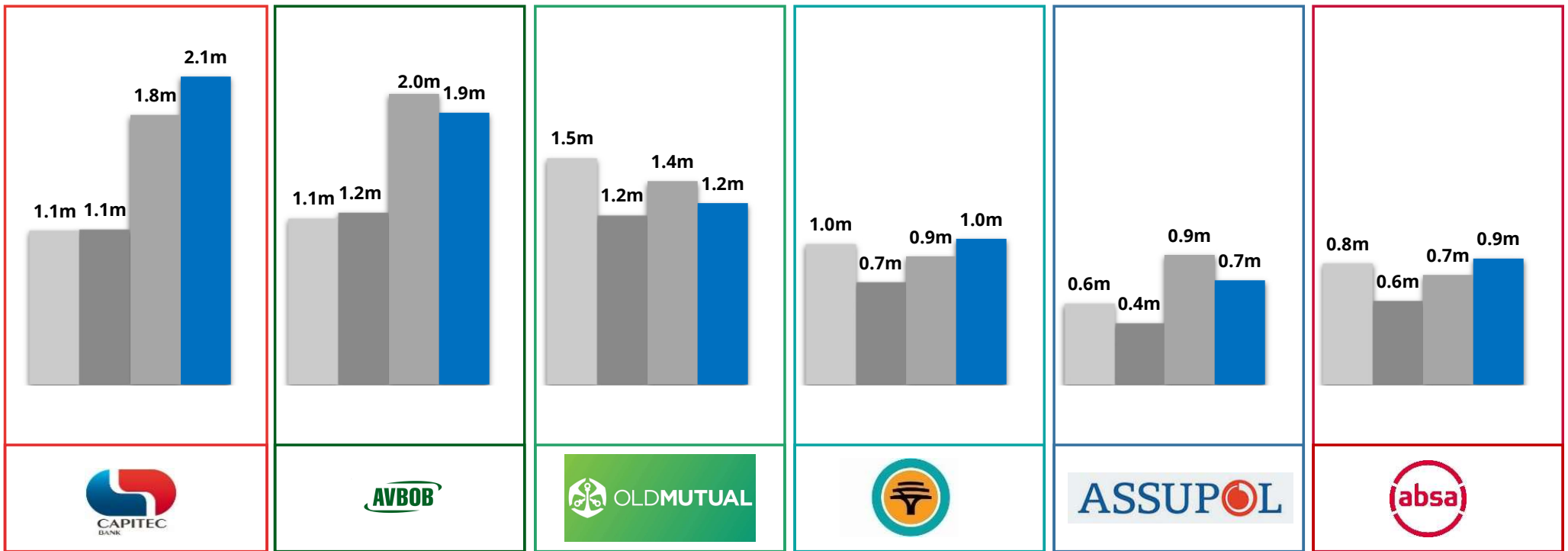


# INSURANCE PENETRATION TREND LINE: QOQ



# TOP TOTAL INSURANCE COMPANIES USED: YOY

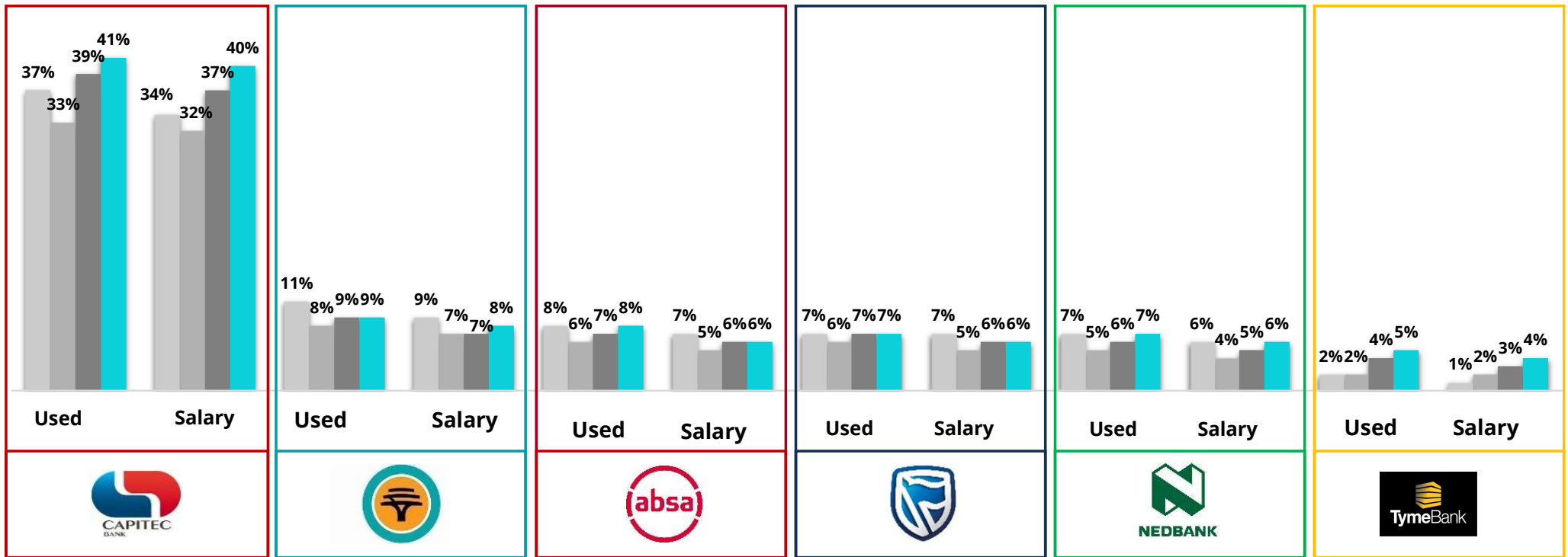
Year 1  
Year 2  
Year 3  
Year 4



## Bank Usage and Salary Deposit Accounts

\*2024  
13% used a  
Virtual  
Card

Year 1  
Year 2  
Year 3  
Year 4



\*2024 Virtual card measures Q1 '24 and Q2'24, data is still growing



MARKETING RESEARCH  
FOUNDATION

# Retail

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**PLUS 94**  
**RESEARCH**

 **31.2M** people spent **R300 or less** and **7.4M** people spent **more than R300** on cell phones per month (include calls, subscriptions, SMSs, vouchers and data)

## Top 4 Networks

\*For phones 1 and 2



**18.2M** use this network



**15.1M** use this network

**Telkom**

**5.4M** use this network



**3.6M** use this network

## SIM Options

\*For phones 1 and 2

**39.5M** cellphone on Prepaid

**16.7M** cellphone on Contract

**12.8M** cellphone on Top Up

## Buying Preference

\*For phones 1 and 2

**23.2M** Buy both Airtime and Data

**17.7M** Buy Airtime

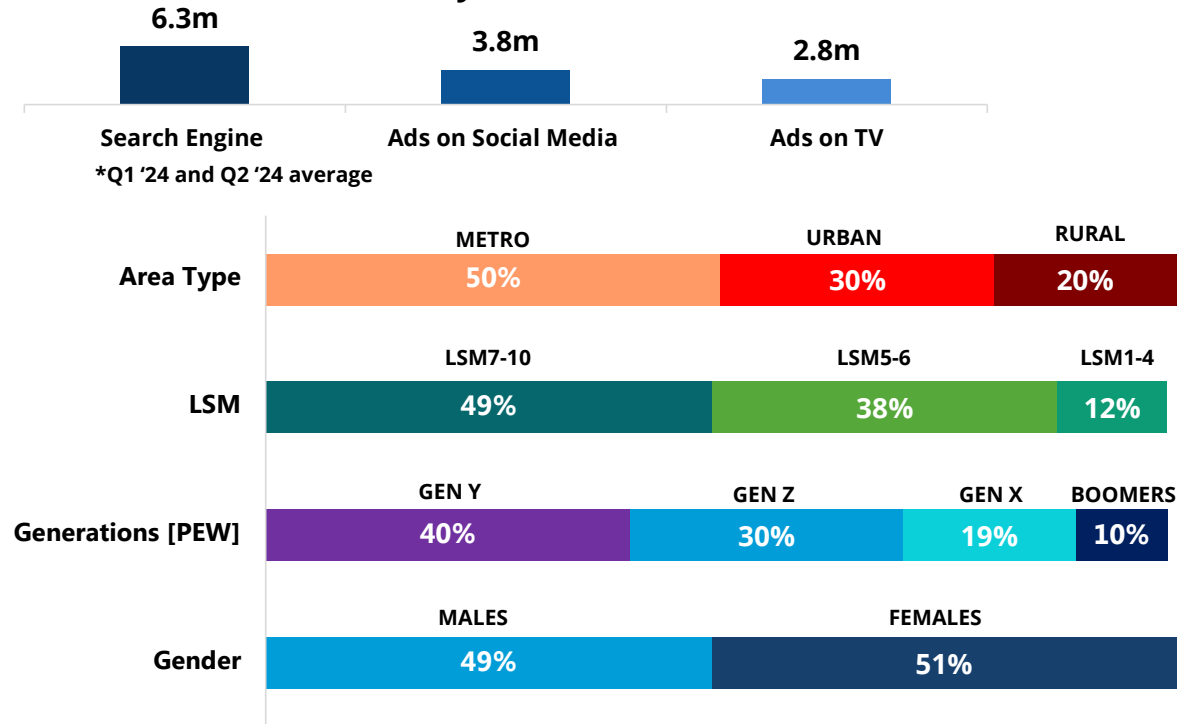
**1.7M** Buy Data bundles only

### Top 3 online shopping categories [P4W]

1. Communications/cellphones/prepaid (minutes/data/SMS) **6.0 million**
2. Clothing **1.5 million**
3. Food/drink **1.6 million**

**923K most often** use food delivery service when purchasing take-aways.

### \*How do you discover new brands?



e-Commerce (P4W) Penetration **21%**

\*Q1 ' & Q2 24 21% Research Brands before purchasing



**P4W**  
**331K** ↓

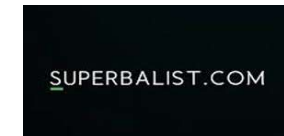


**P4W**  
**277K** ↑

CLOTHING PURCHASE ONLY\*



**P3M**  
**443K\*** ↑



**P3M**  
**57K\*** ↓

Online shopping\* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on N = 9 369 661

N=9 369 661



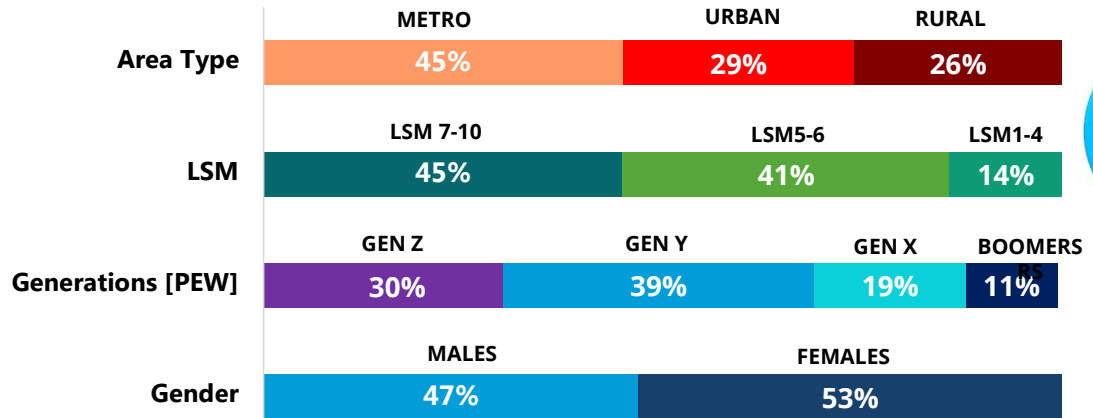
**49%** bought fast food P4W



**R195** average spend on fast food on last restaurant visit.

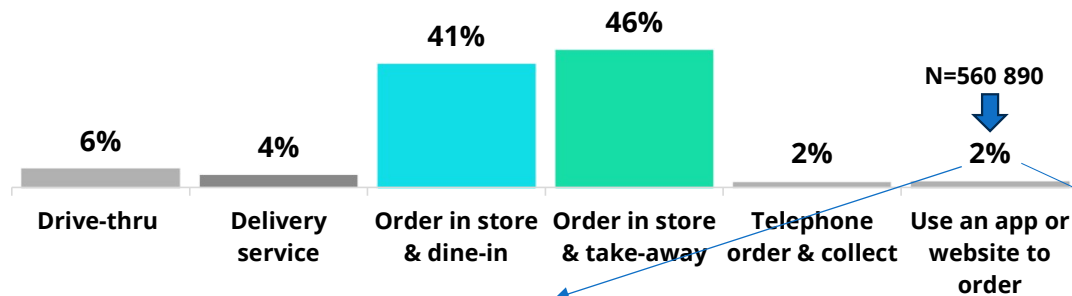
924K use Fast Food delivery Service

## Fast Food Purchases N=21 198 016



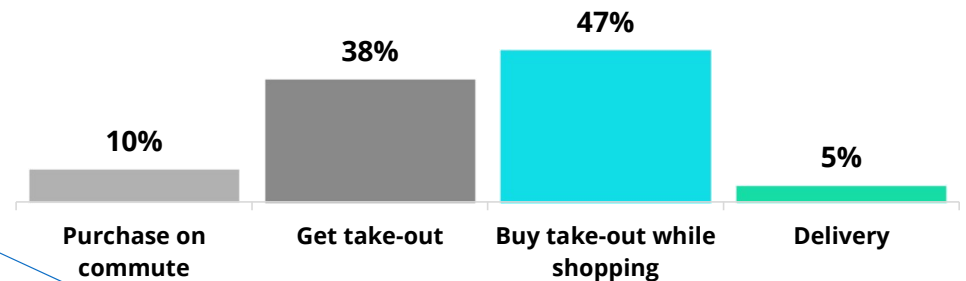
Average party size on last restaurant outing:  
**3**

## Most often used method to order food N=25 359 959



**Uber Eats** **38% (P4W)** order from Uber Eats

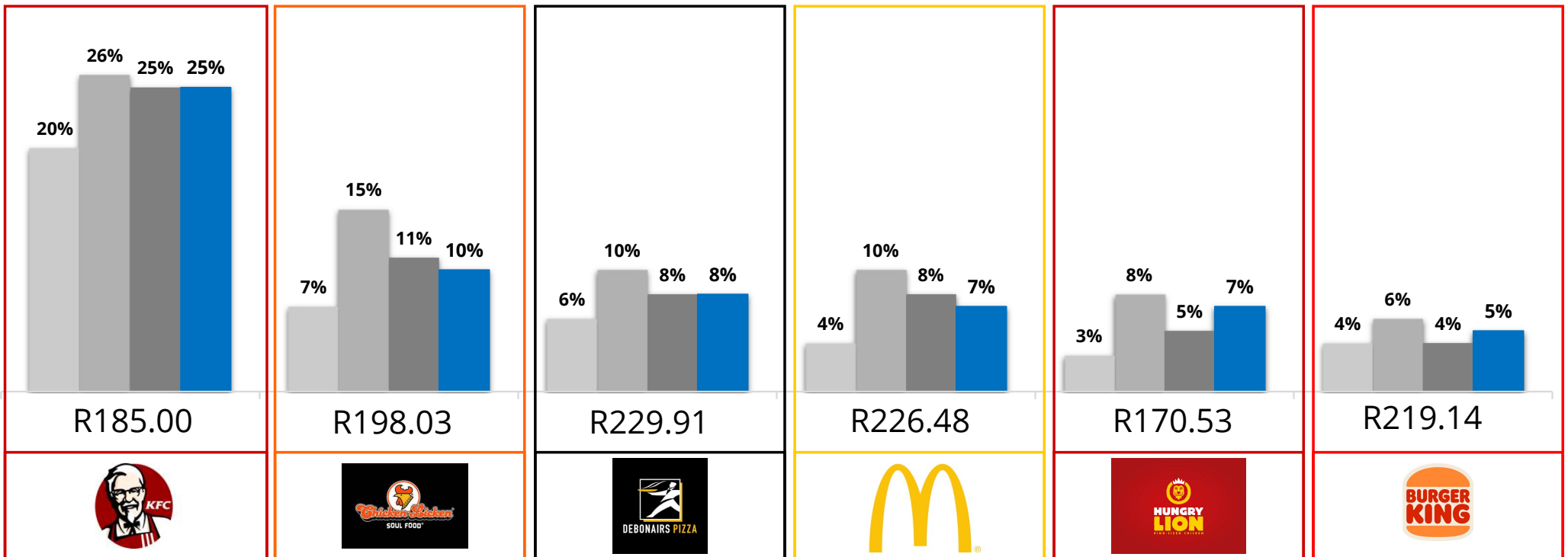
## Buying behaviour N= 2 197 101



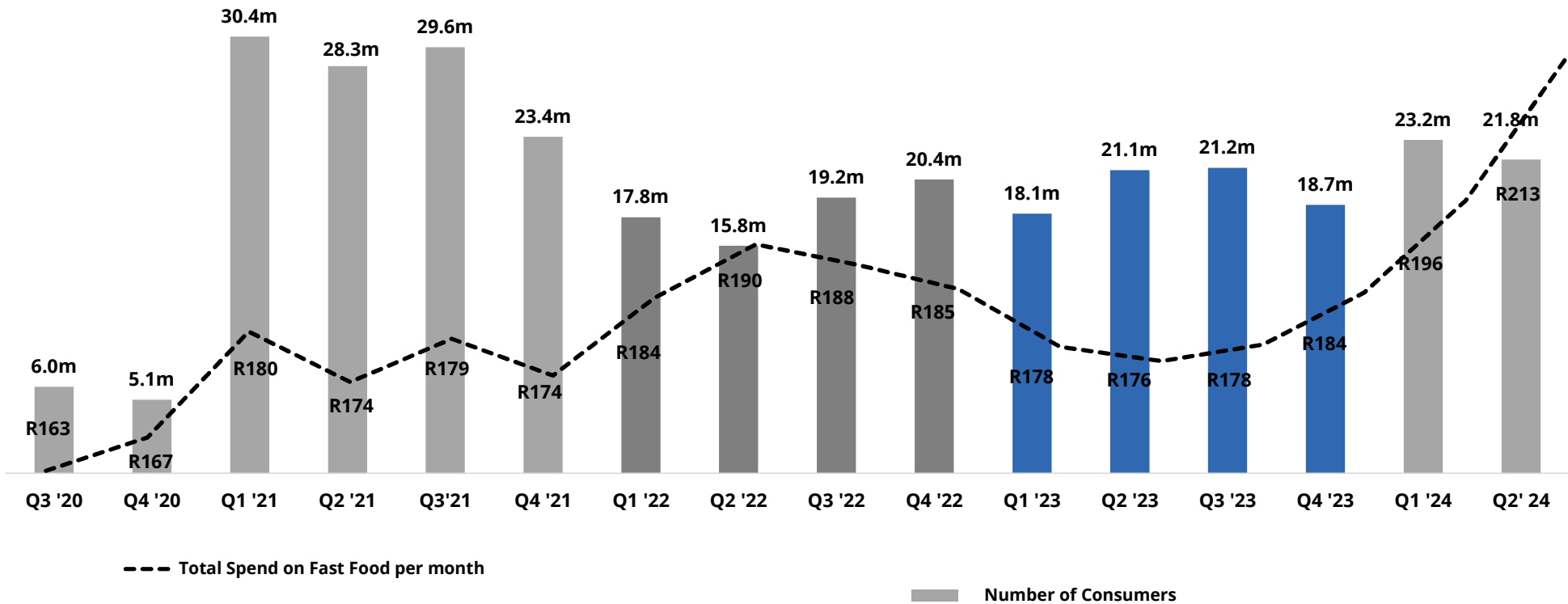
**MR D** **33% (P4W)** order from Mr. D

# TOP 6 FAST FOOD BRANDS AND AVERAGE SPEND: YOY

Year 1  
Year 2  
Year 3  
Year 4







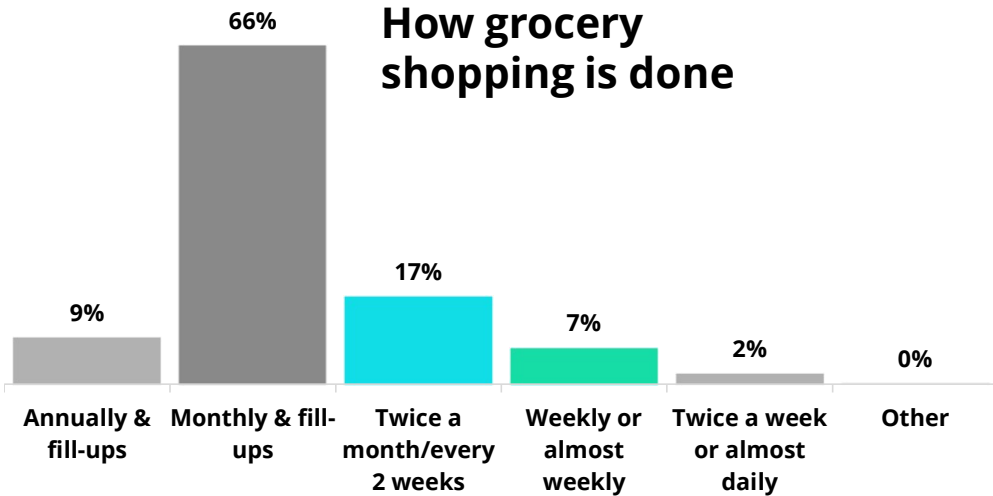


**R2 033** average monthly spend on groceries.

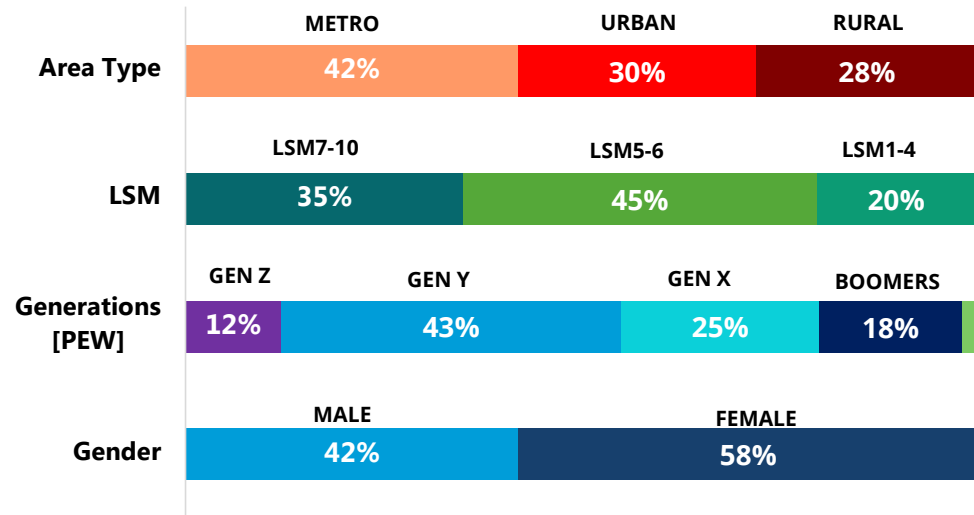


**67%** of the respondents usually do the grocery shopping themselves in their household.

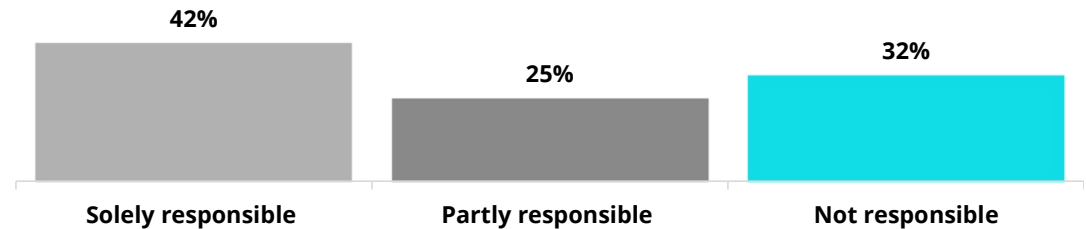
## How grocery shopping is done



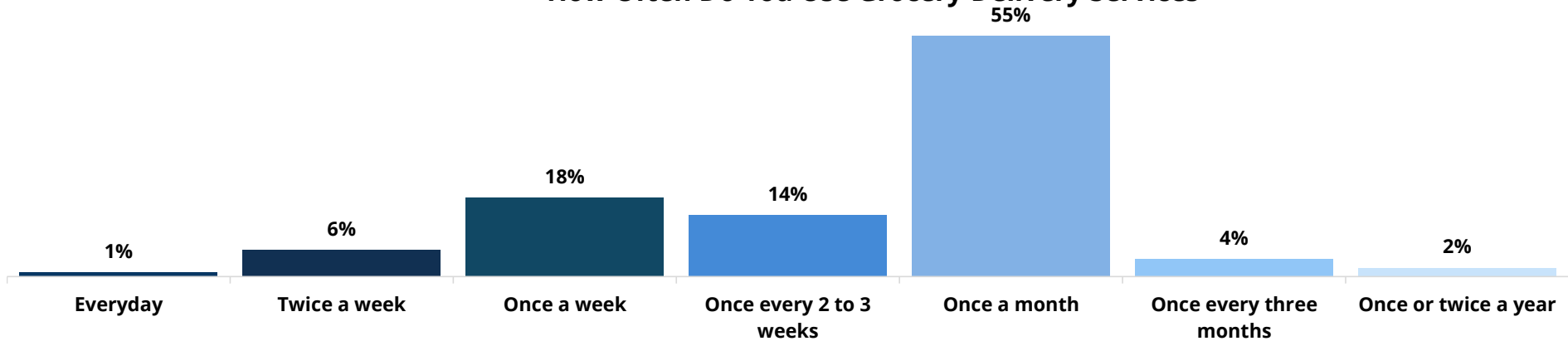
## Shopping Responsibility



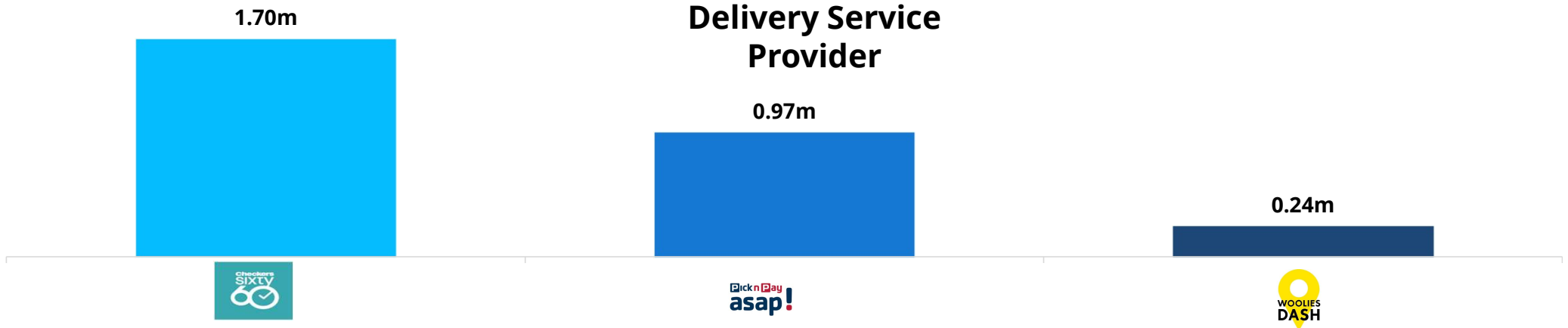
## Household purchases responsibilities



## How Often Do You Use Grocery Delivery Services



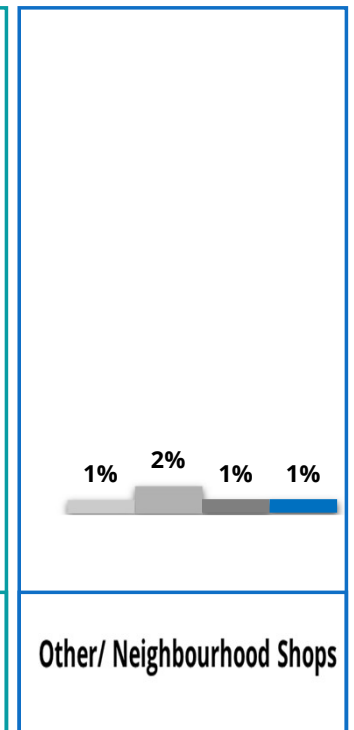
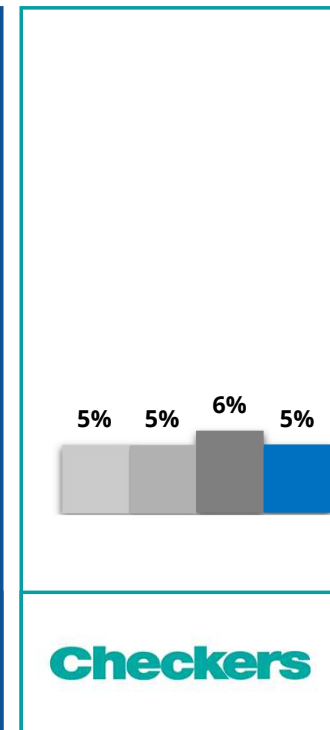
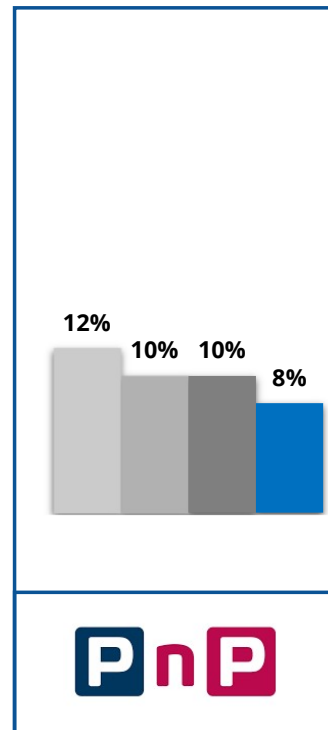
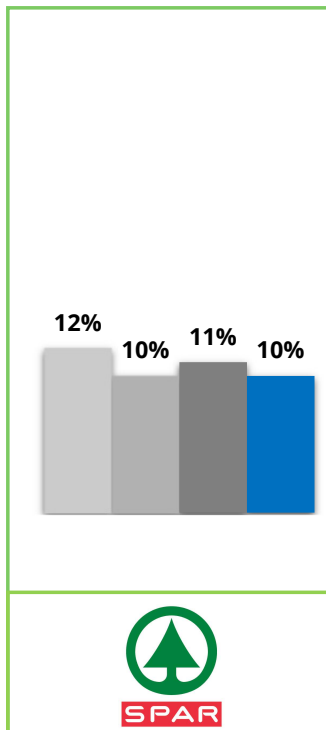
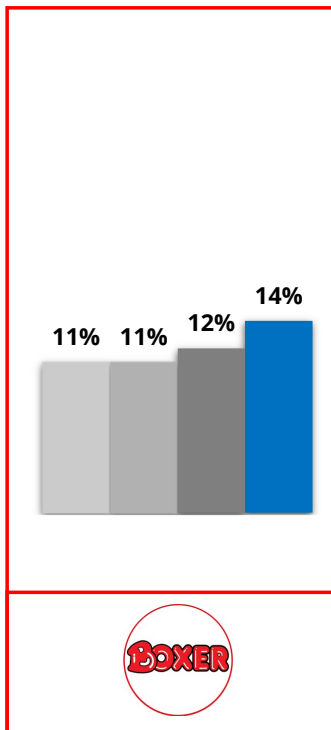
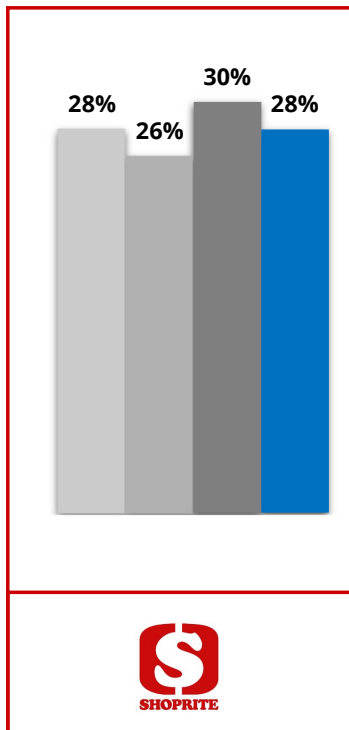
## Delivery Service Provider



*\*The data is an average of Q1 '24 and Q2 '24, the data is still growing.*

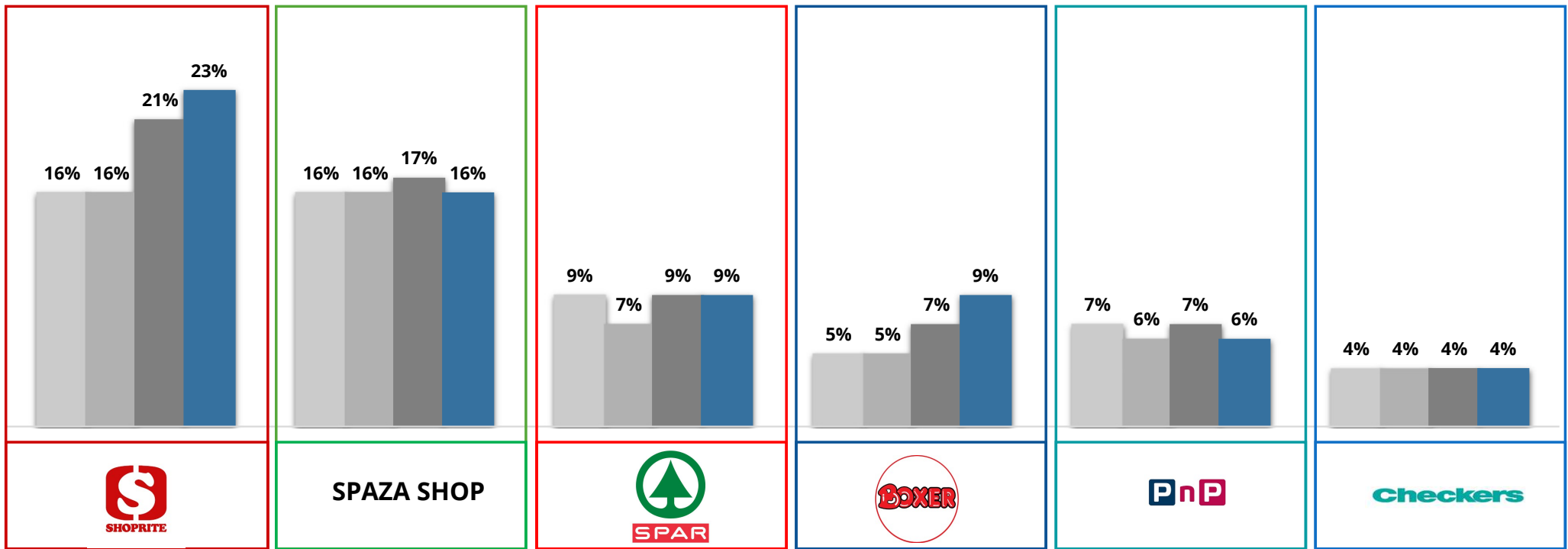
# TOP RETAILERS: BULK SHOPPING (IN STORE) YOY

Year 1  
Year 2  
Year 3  
Year 4



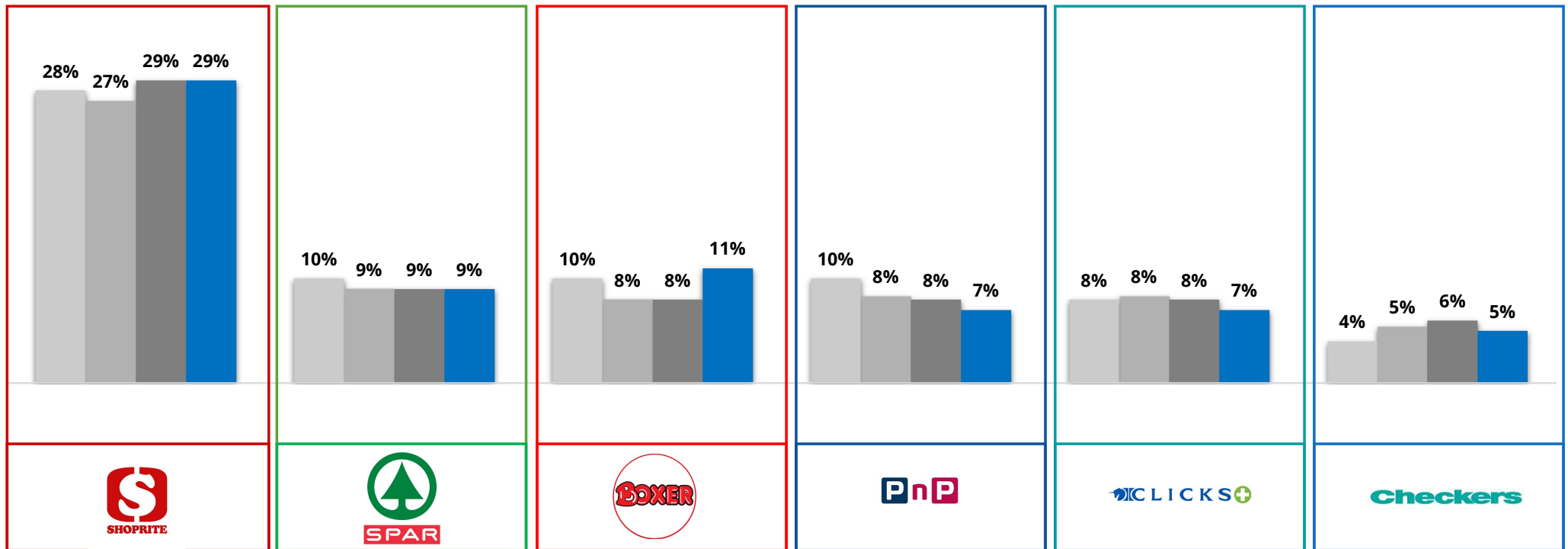
# TOP RETAILERS: DAY TO DAY (IN STORE) GROCERIES YOY


- Year 1
- Year 2
- Year 3
- Year 4




# TOP RETAILERS: TOILETRIES (IN STORE) YOY

Year 1  
Year 2  
Year 3  
Year 4






**R514** average monthly spend on alcoholic beverages

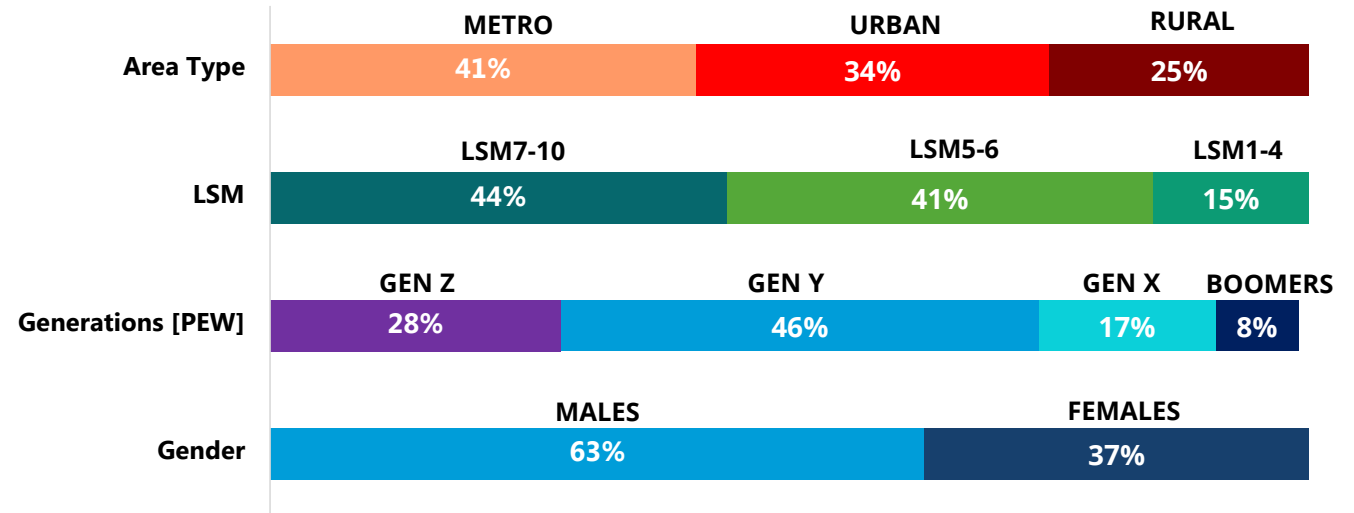


**23%** bought liquor in P7D

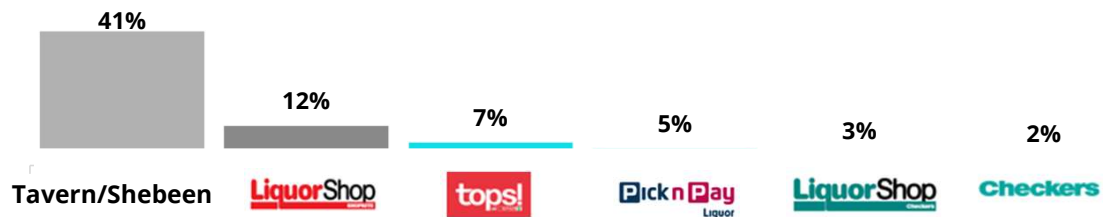


**13%** bought liquor in P7D from a tavern/shebeen

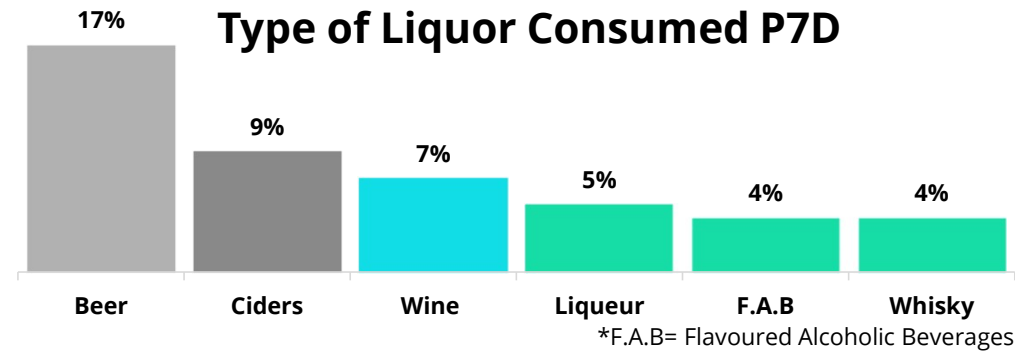
## Bought Alcohol P7D Population Distribution







## Top Liquor Outlets P7D



## Type of Liquor Consumed P7D



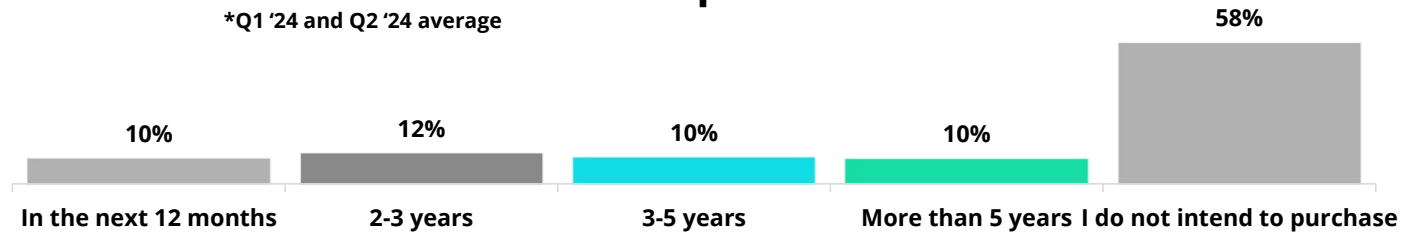
-  **R2068** average monthly spend on fuel
-  **45%** have a tracking device
-  **R5009** average instalment price
-  **62%** people purchased second-hand vehicle

87% of from car owning homes, personally drive a vehicle

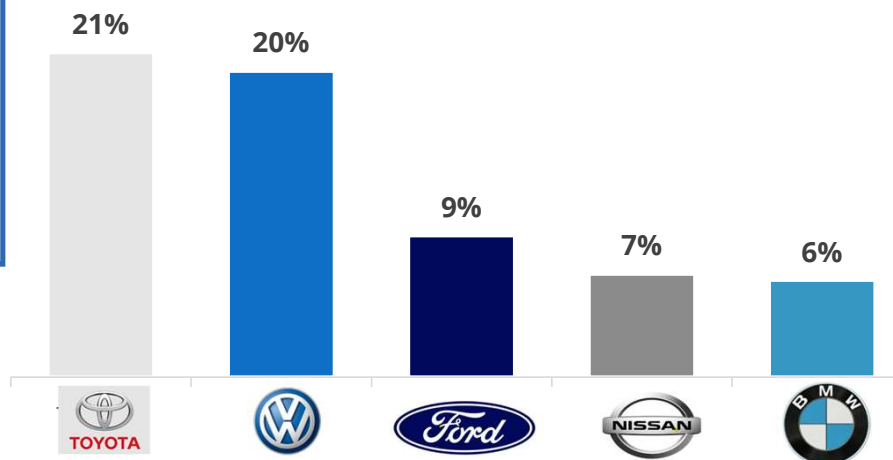
37% of car drivers personally own a vehicle

## Intended next vehicle purchase

\*Q1 '24 and Q2 '24 average

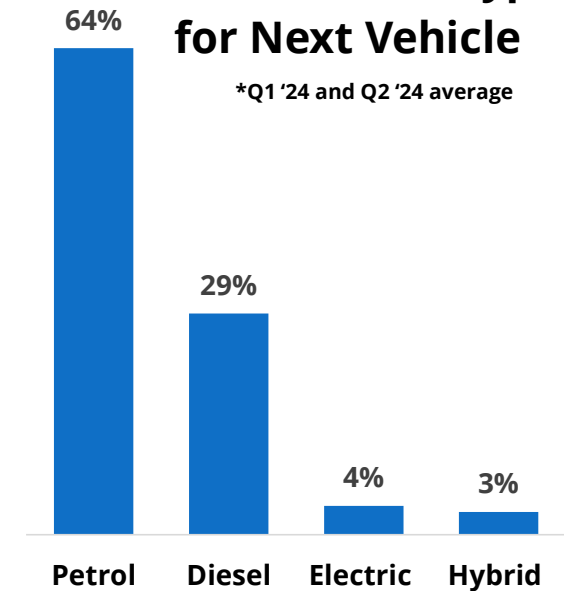


## Most Common Vehicle Brands Driven



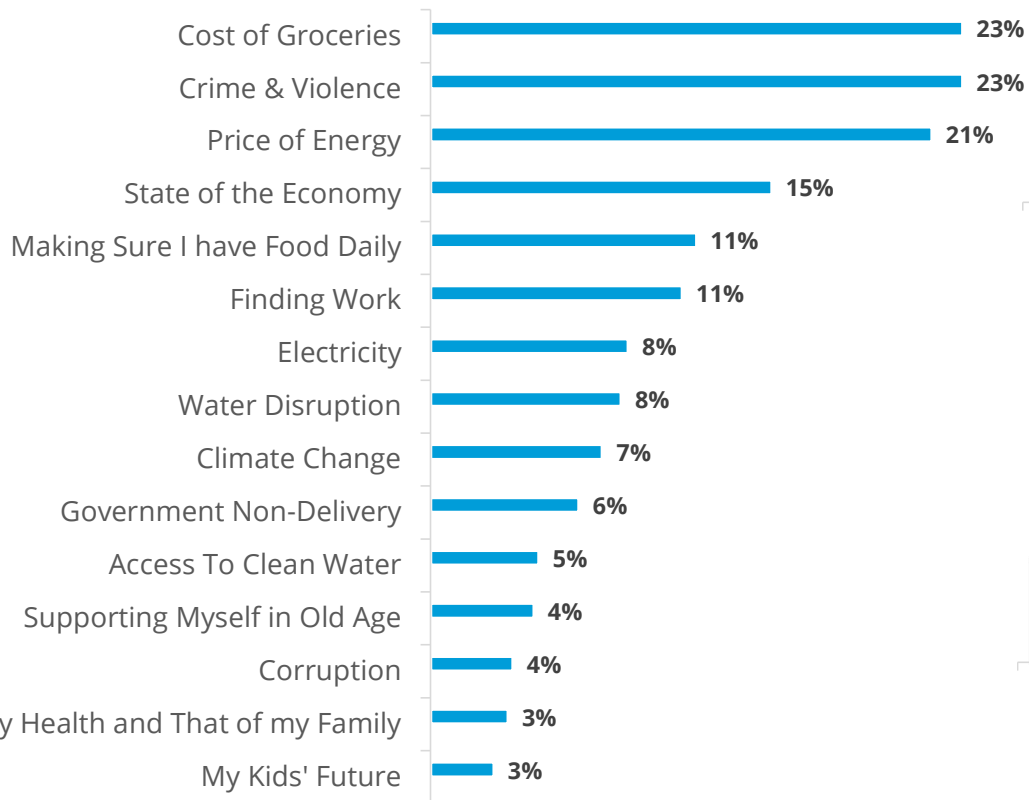
## Preferred Fuel Type for Next Vehicle

\*Q1 '24 and Q2 '24 average



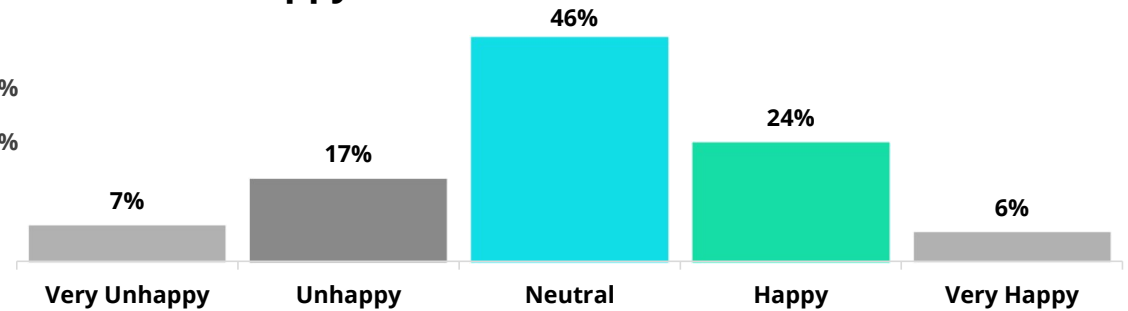


## Current Worries

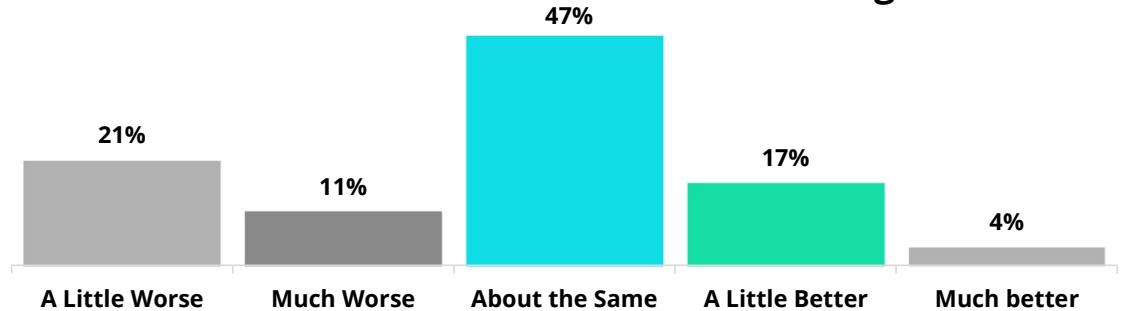


\*Q1 '24 and Q2 '24 average, the data is still growing.

## How Happy with Life and Current Circumstances



## Personal Finances vs A Year Ago





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Thank you.

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