



MARKETING RESEARCH  
FOUNDATION

# MAPS WEBINAR: Jan '21 – Dec '24

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**PLUS 94**  
**RESEARCH**

MAY 2025

# 204

Interviewers in field

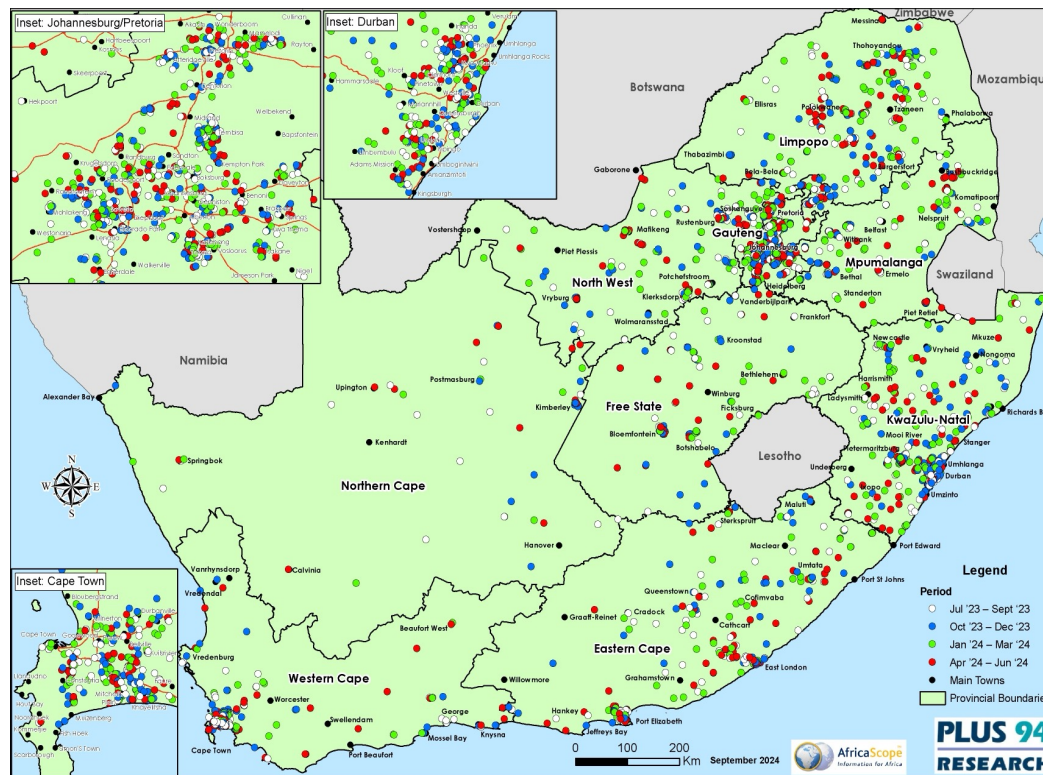
# 20 000

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 | Internet interaction | Clothing | Shoes | Apparel spend | Cellphones | Vehicles | Financial | Personal expenditure | Purchasing behaviour | Fast Food – behaviour, consumption and outlets | Media | Leisure | Activities | Activities | Interests | Psychographics | Shopping – Purchasing behaviour/ Grocery stores/Liquor outlets/buying habits/volumetrics and spend/Clothing purchasing and stores/instore/online/spend | 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

## Media Interaction

**Television** - Linear/live TV watching | Viewed TV channels – P7D | Location of TV viewing | Satellite services/packages used | Type of TV decoder used

**Radio** - Radio stations listened to – P7D | 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 | 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 |

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

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

## Face-to-Face Questionnaire

Covers over 5000 brands within the 800+ questions

## Leave Behind Questionnaire

Covers Behaviour and Brands within the 480 questions

*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*

# Demographics

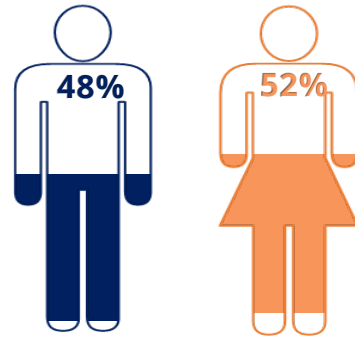
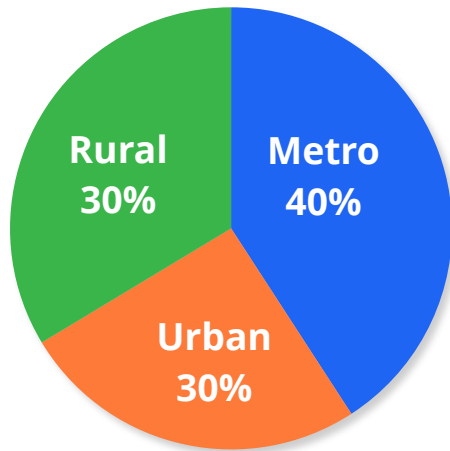


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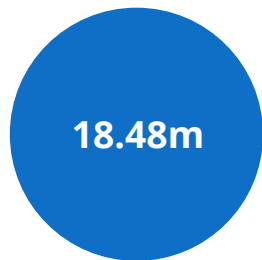
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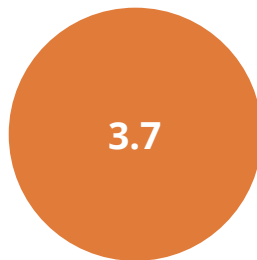
## Area Distribution



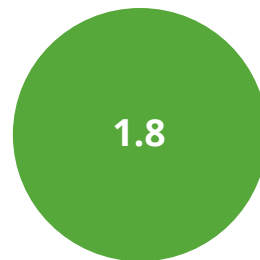
## Households



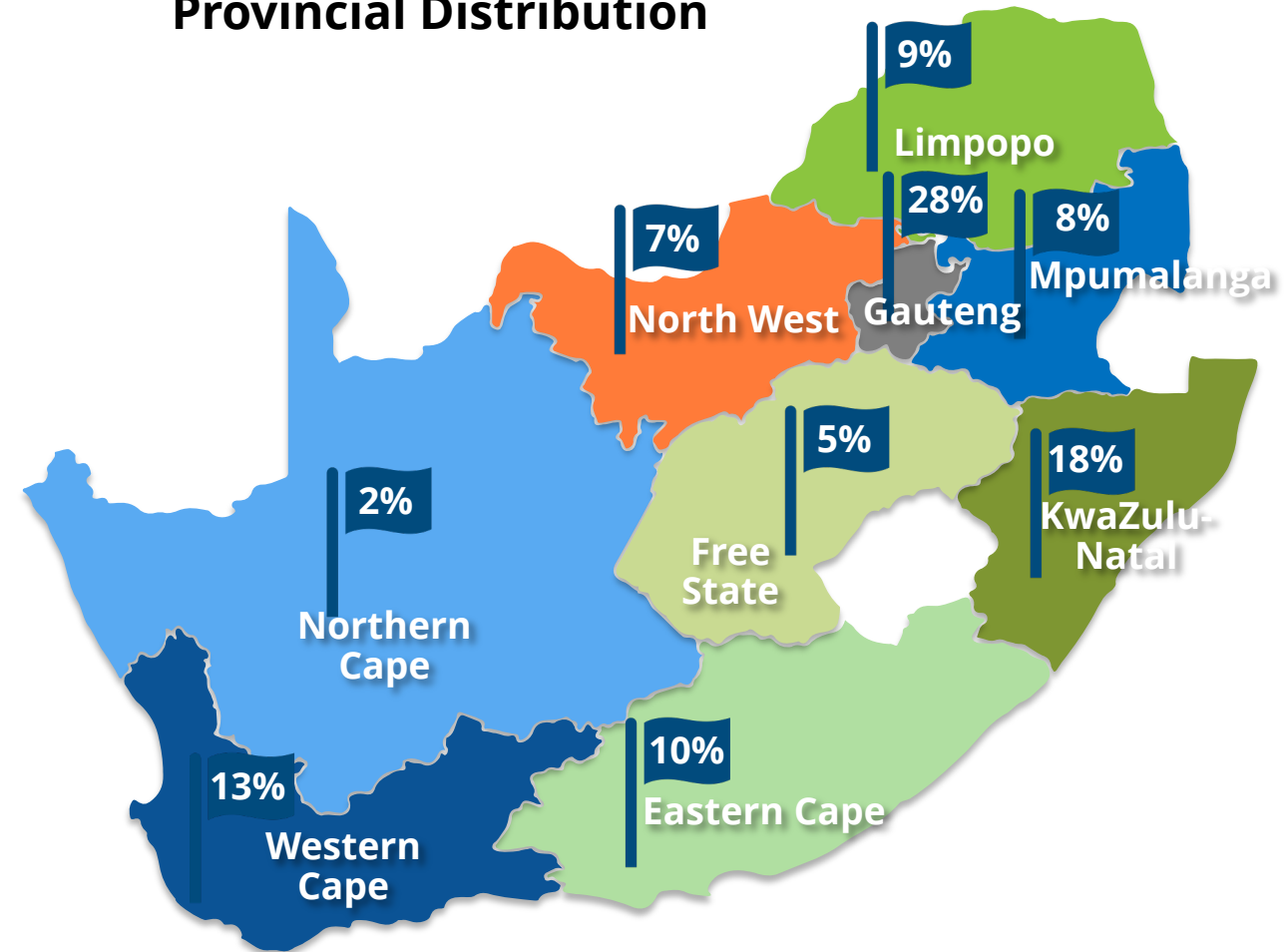
## People per household



## Dependants per household

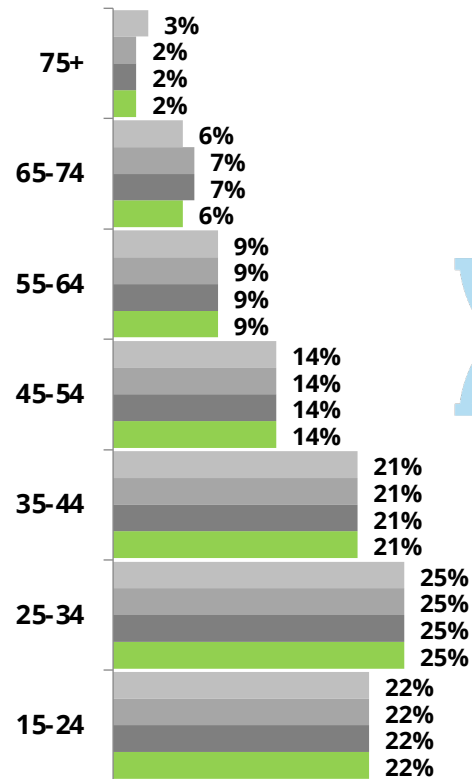


## Provincial Distribution



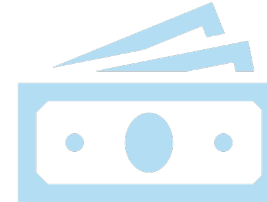
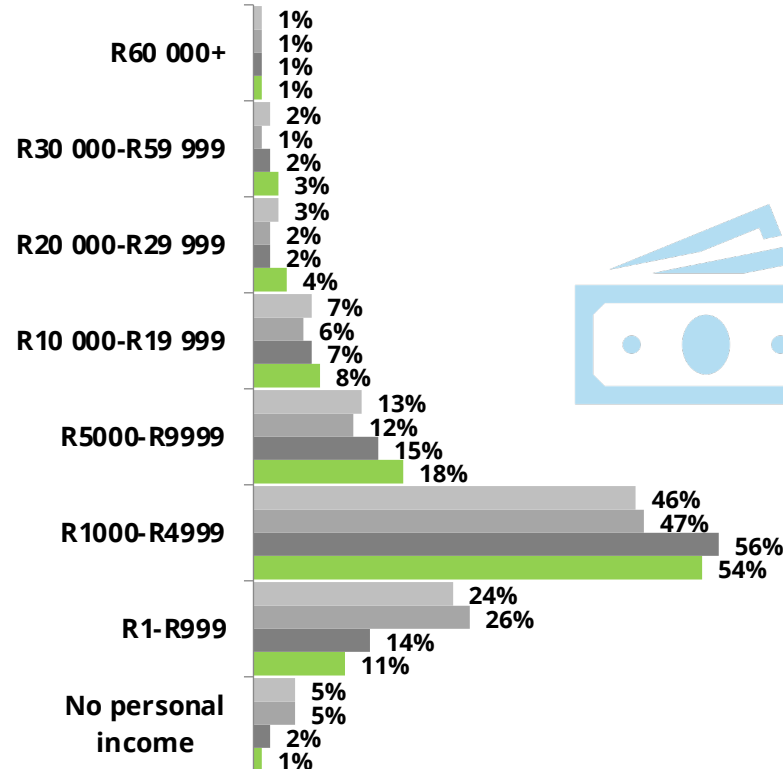
# DEMOGRAPHICS: YoY SHIFTS

## Age Groups



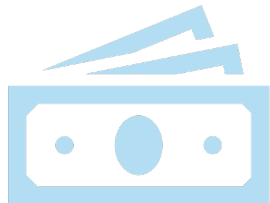
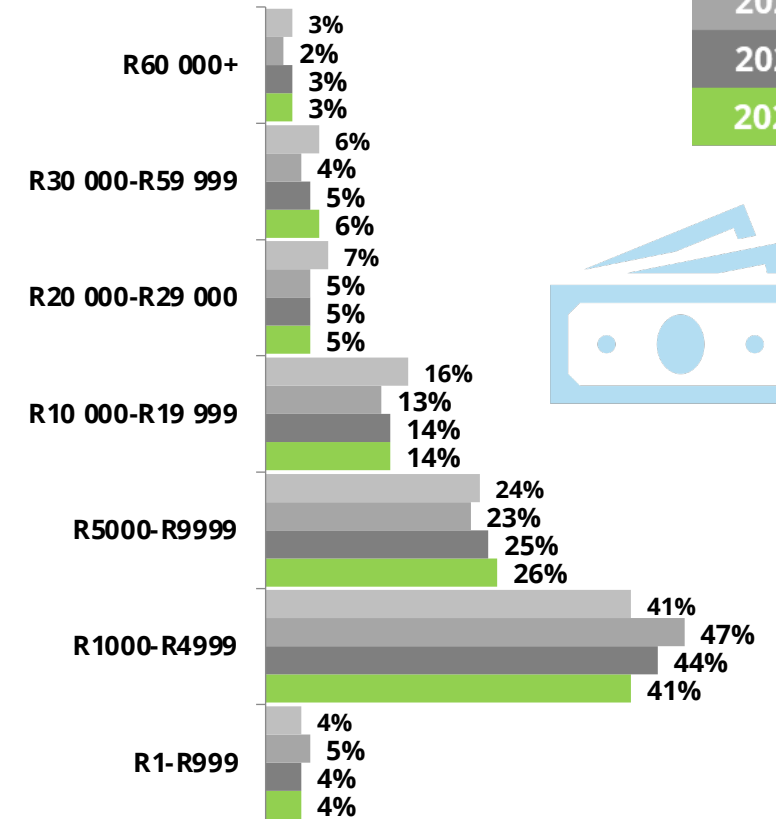
Average age: 38  
Average age: 38  
Average age: 38  
Average age: 38

## Personal Income



Average Income: R 5 103  
Average Income: R4 671  
Average Income: R 5 822  
Average Income: R6 774

## Household Income



Average Income: R 12 044  
Average Income: R10 349  
Average Income: R11 454  
Average Income: R 12 100

2021  
2022  
2023  
2024



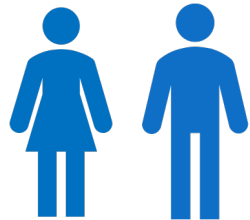
# POPULATION: % YoY

## Gender

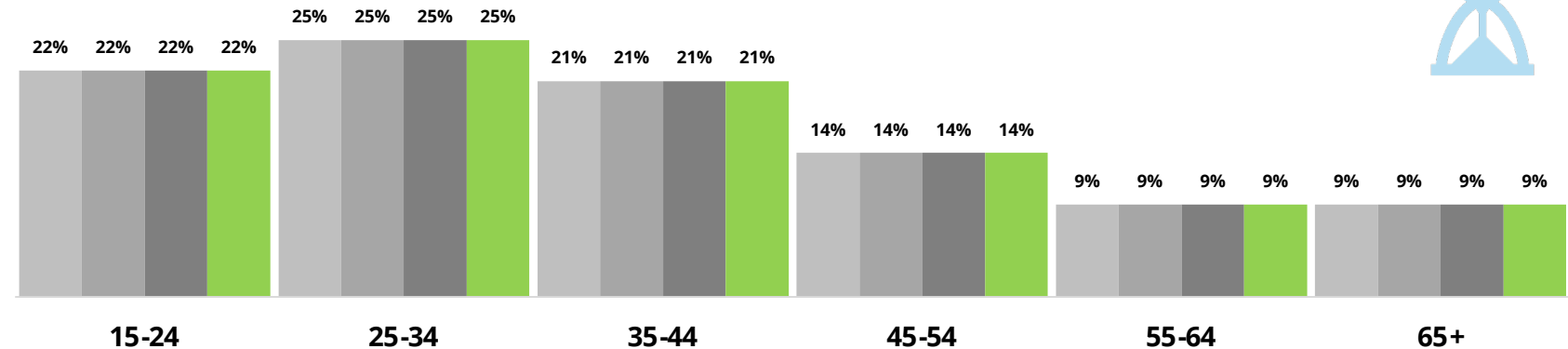


2021 - 2024

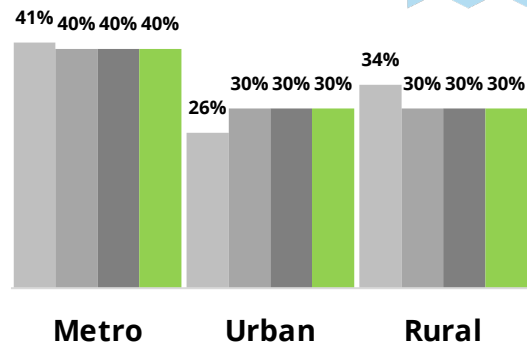
52% 48%



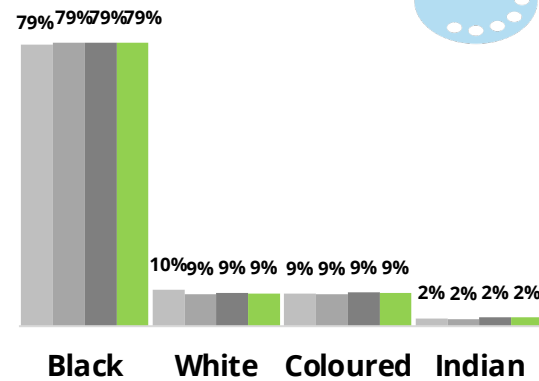
## Age Groups



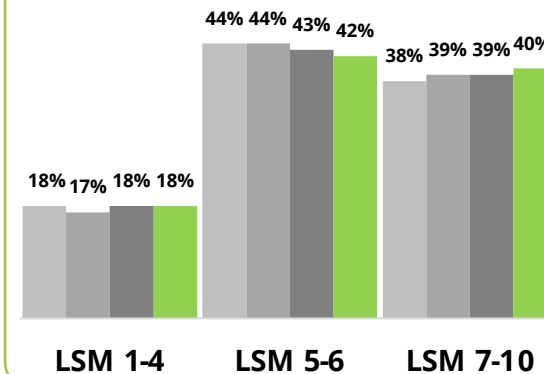
## Area



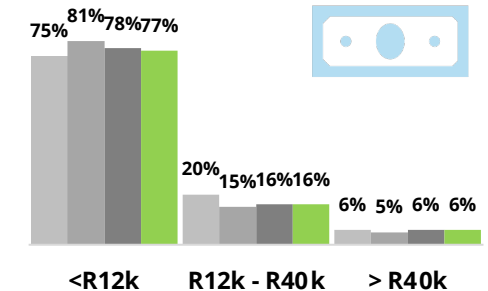
## Race



## LSM



## Monthly Household Income



2021

2022

2023

2024

# Economic Landscape



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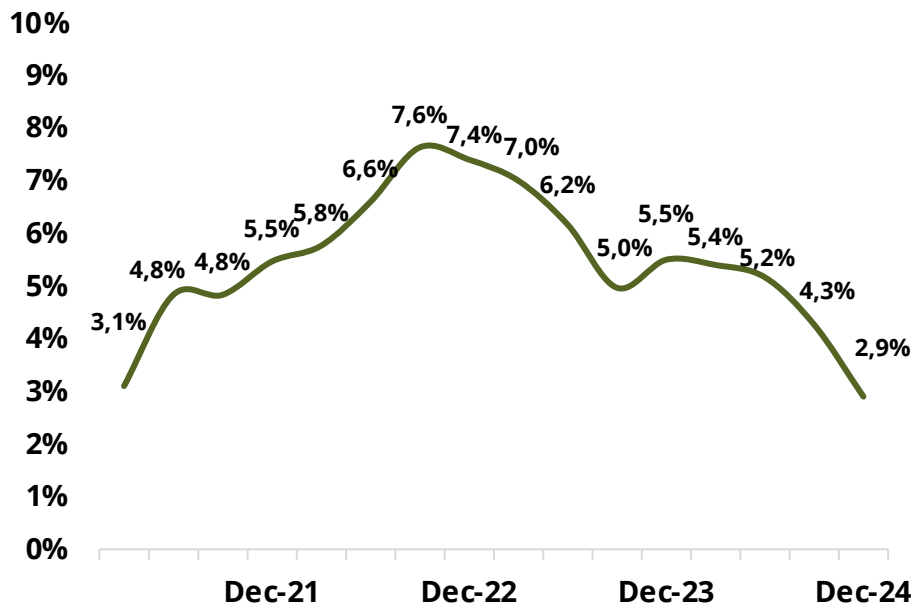
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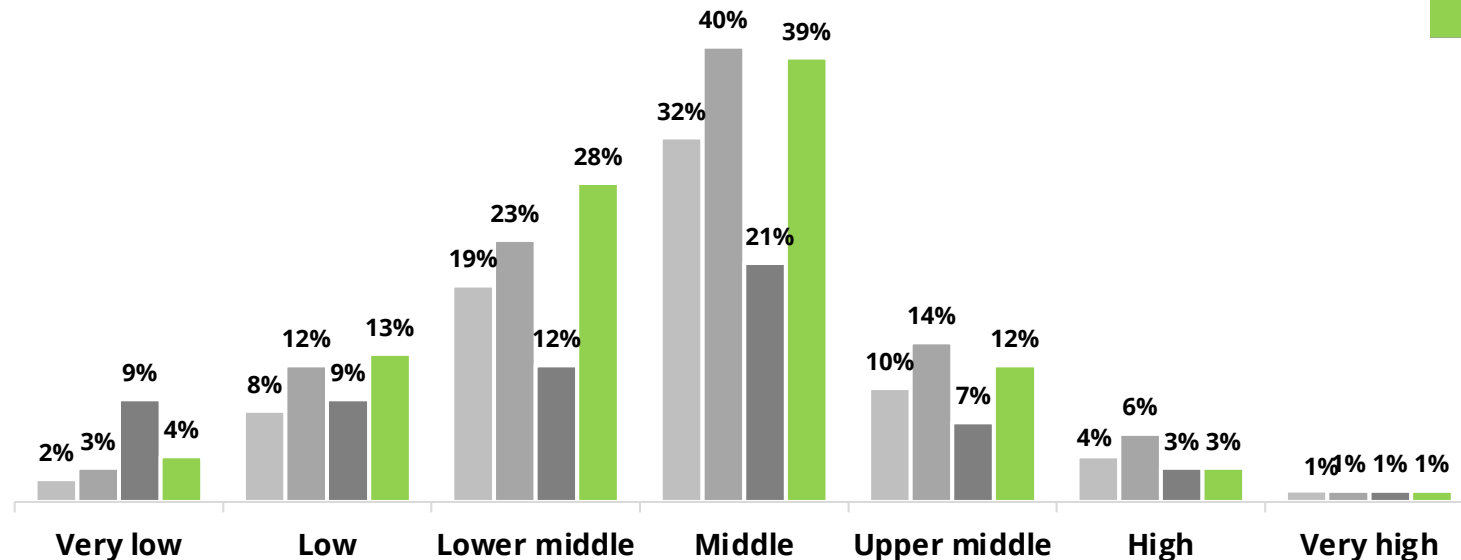




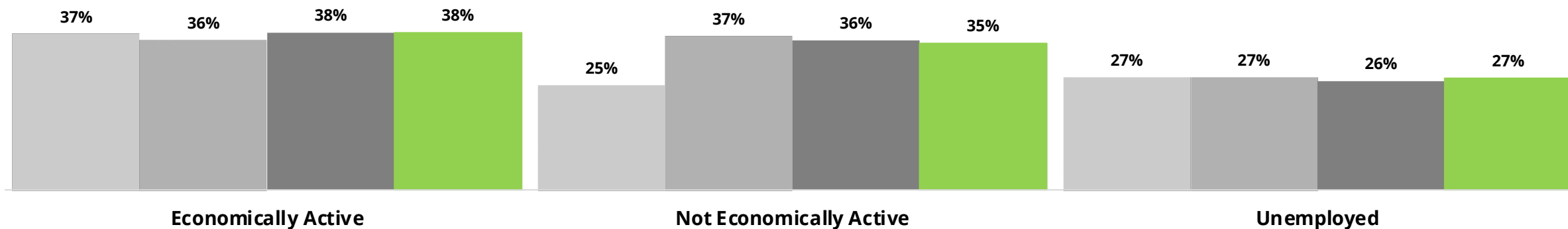
## South African Inflation Rate



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



## Working Status



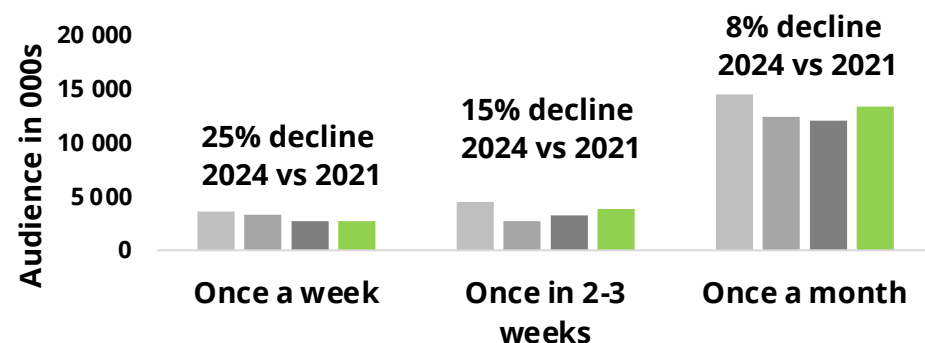
2021

2022

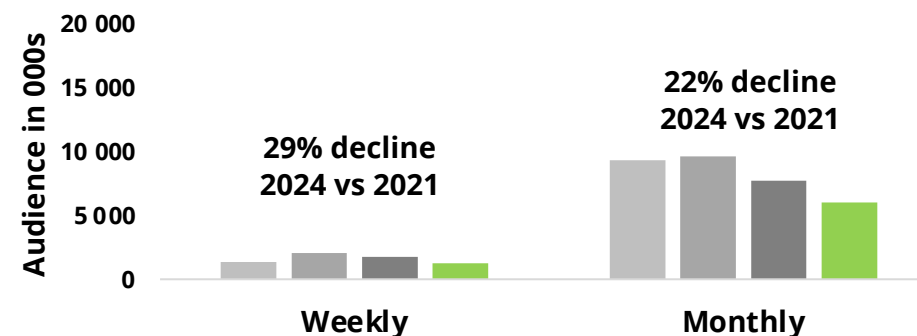
2023

2024

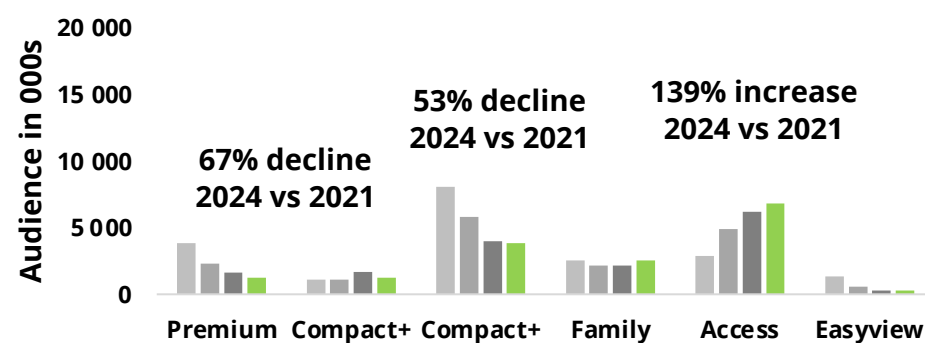
## Fast Food – Frequency



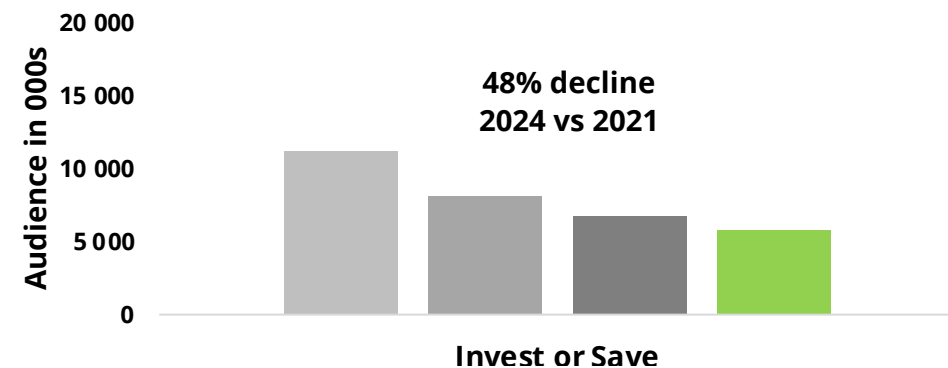
## Eat Out - Frequency



## DStv Subscription Base

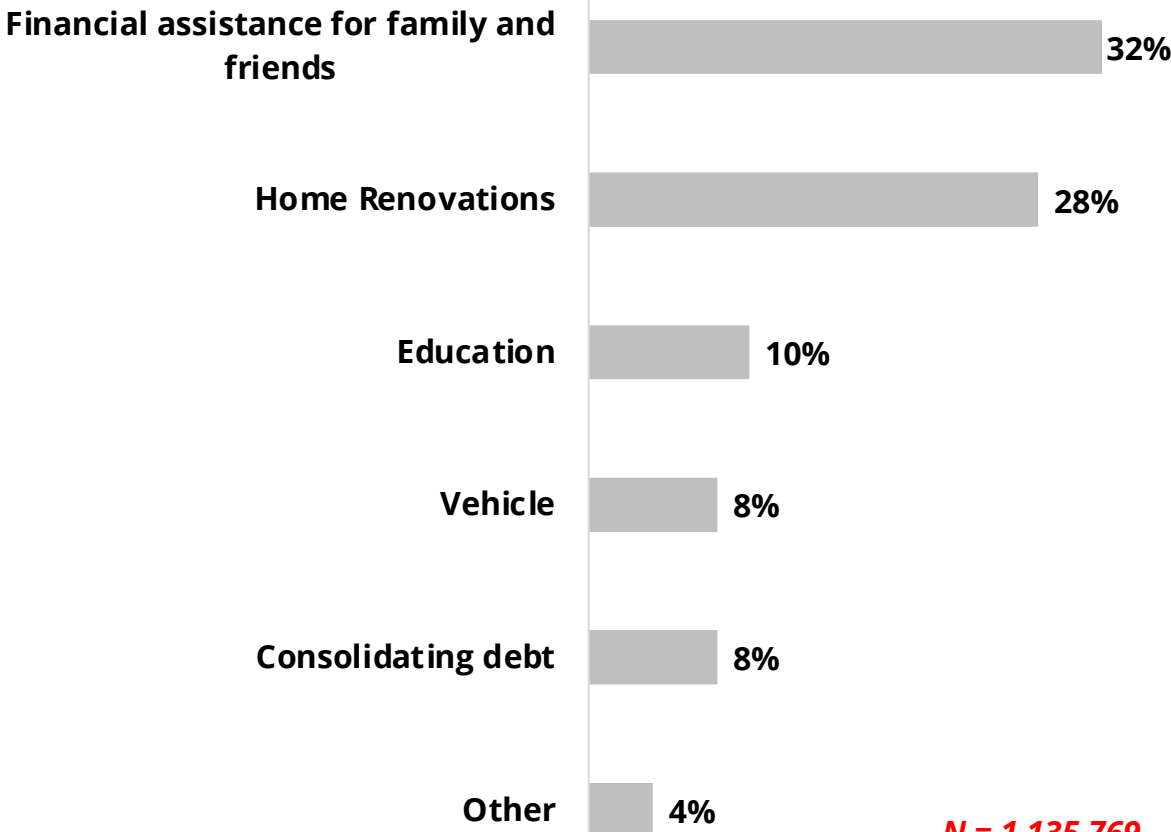


## Save or Invest



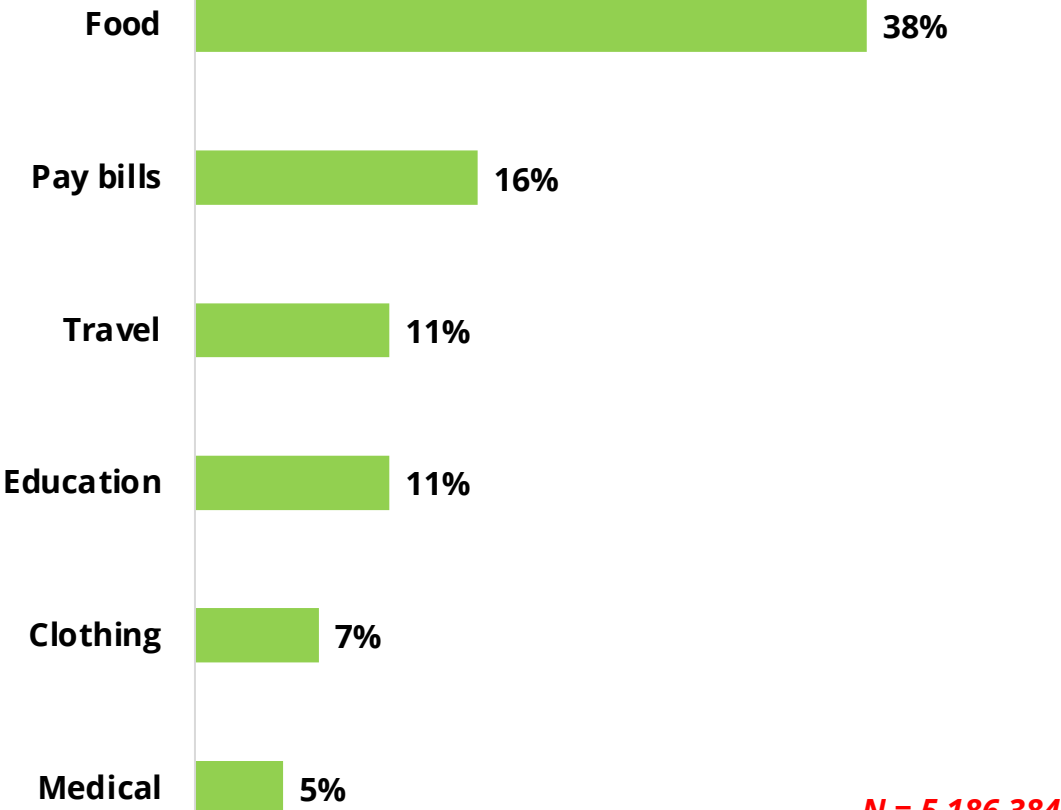
# LOANS - TOP REASONS FOR LOANS TAKEN

2021



N = 1 135 769

2024



N = 5 186 384



2021

2022

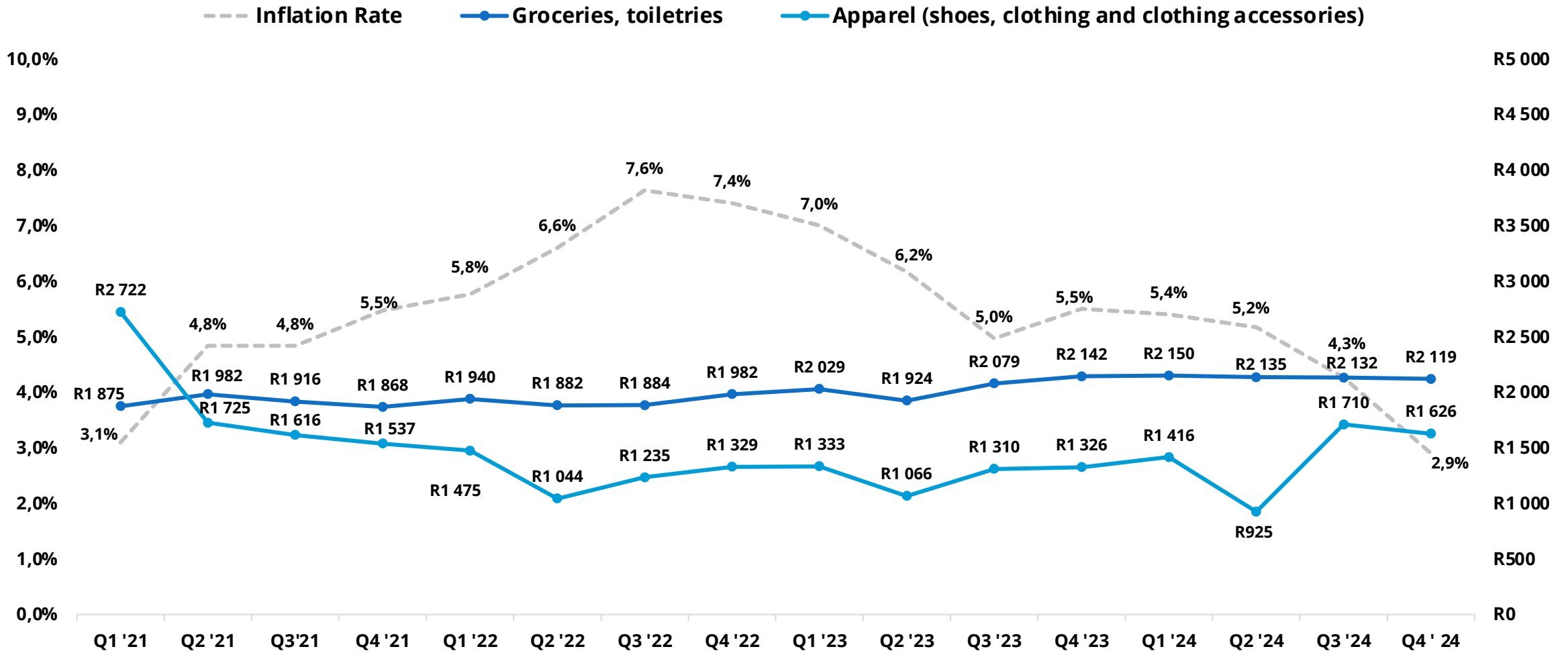
2023

2024

## Do you always buy the same brands?



# AVERAGE MONTHLY SPEND: GROCERIES + TOILETRIES & APPAREL: QoQ



\*CPI Inflation rate figures provided by StatsSA (January 2025)

# Media Landscape



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# TV LANDSCAPE (P7D)

**17%** of people spend **more**  
**than 20 hours** per week  
watching TV.

## TOP 4 TV Channels Viewership

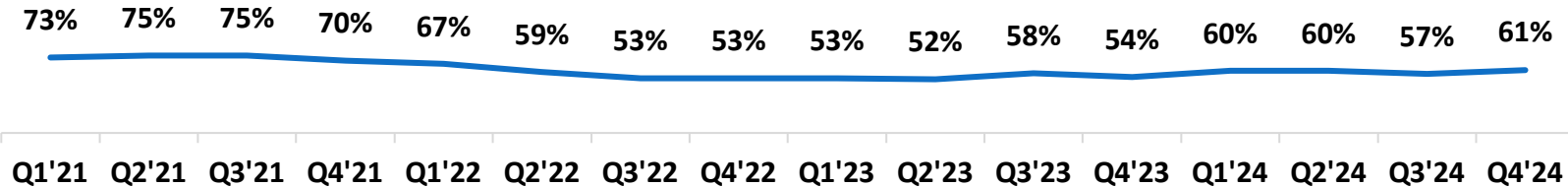
SABC 1 **40%** Watched  
P7D

e **32%** Watched  
P7D

SABC 2 **22%** Watched  
P7D

SABC 3 **14%** Watched  
P7D

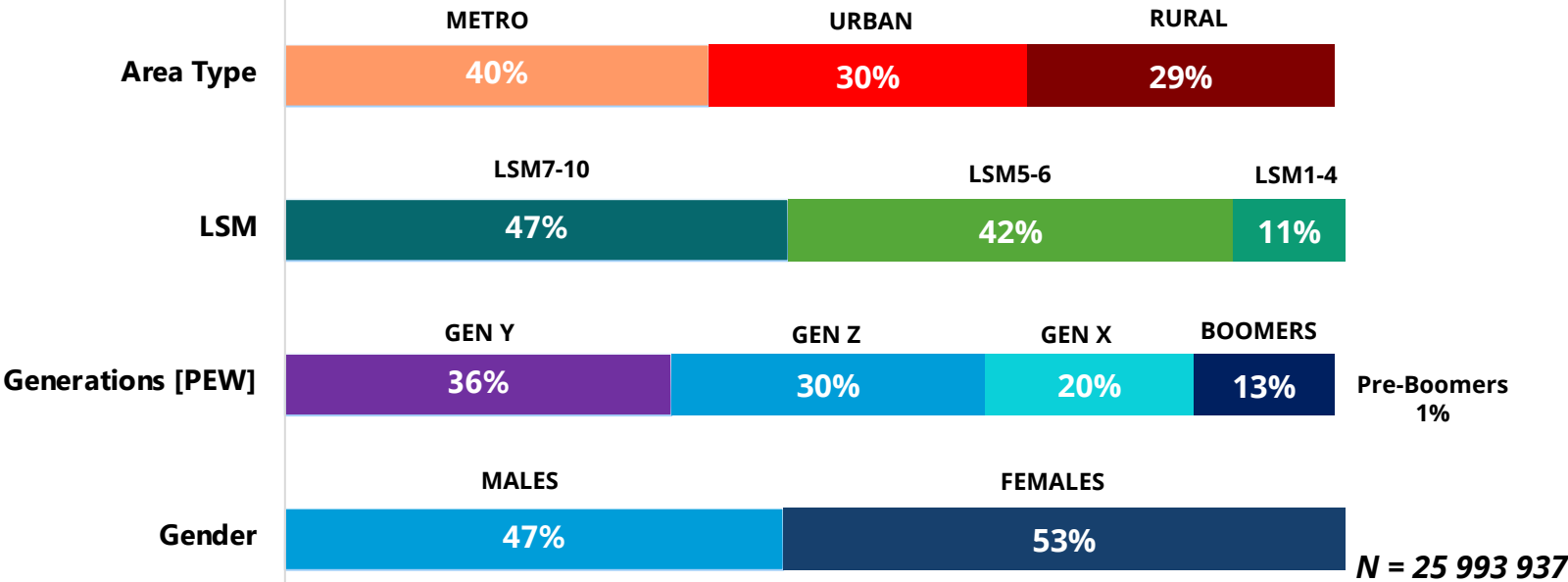
## Watched TV\*P7D



**2024** TV Penetration  
(P7D)  
**60%**

**2024** DStv Penetration  
(P7D)  
**41%**

*DStv  
Exclusive  
Channels*



21% of people have access to on-demand streaming services.

## Top 3 Streaming services

NETFLIX

Access to Netflix  
78%

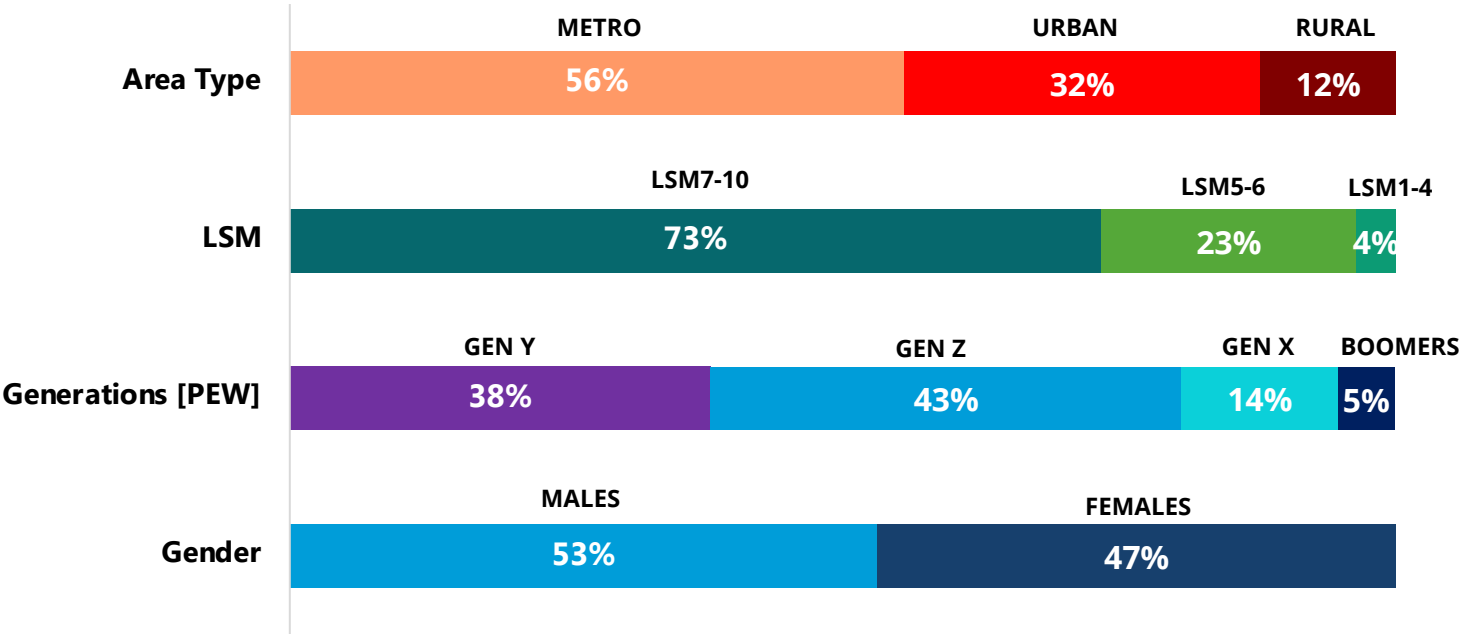
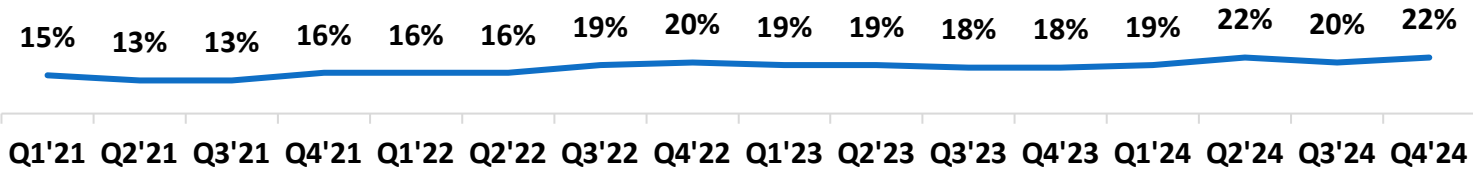


Access to Showmax  
47%



Access to YouTube (PAID)  
12%

## On-demand streaming



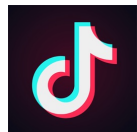
N = 8 956 804

# VIDEO CONTENT VIEWING ON SOCIAL MEDIA

**35%** people watched video  
content in the **(P7D)**

## Top 4 Social Media Sites P7D

**facebook** Visited  
Facebook  
**74%**



Visited  
TikTok  
**38%**

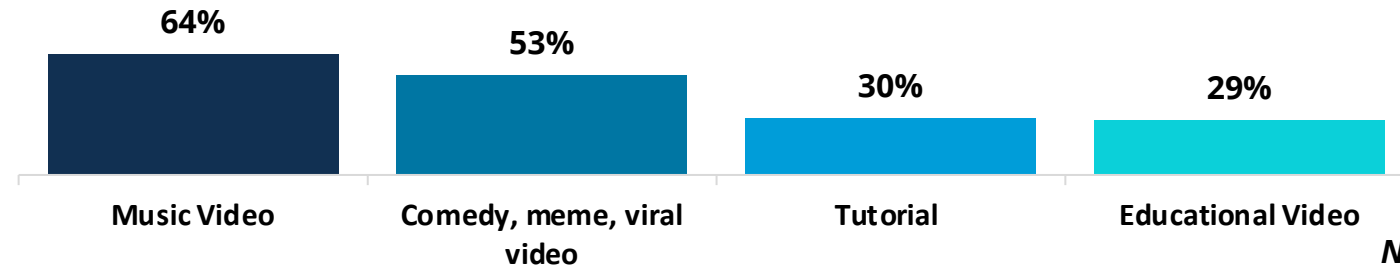


Visited  
YouTube  
**27%**

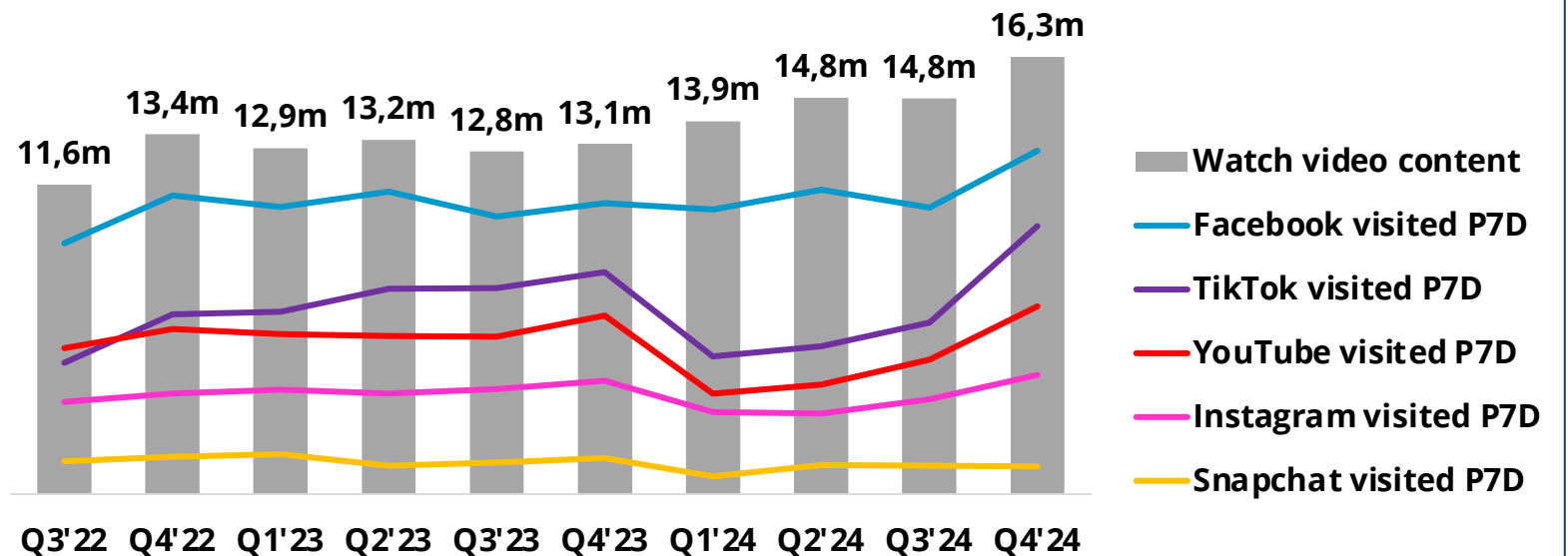


Visited  
Instagram  
**20%**

## Video Content Types P4W



## Filter: Video Content Viewed

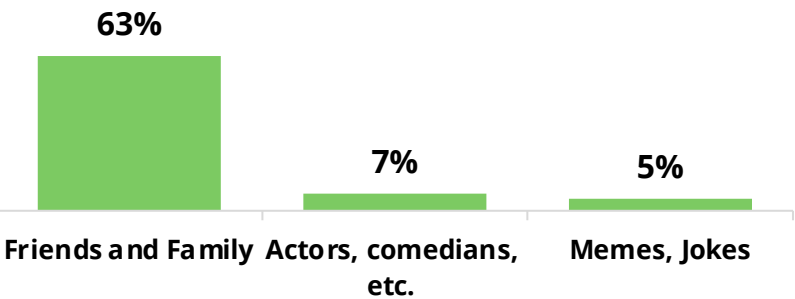




25% of South Africans spend more than 20 hours per week on social media.

8.6M South Africans top social media profiles or pages followed is of Friends, family and people they know.

Top 3 Social Media Pages followed

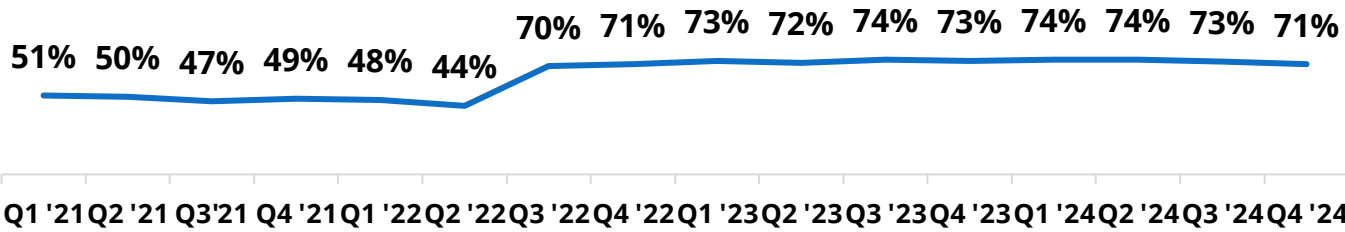


P4W: TOP 3 SOCIAL MEDIA PLATFORMS

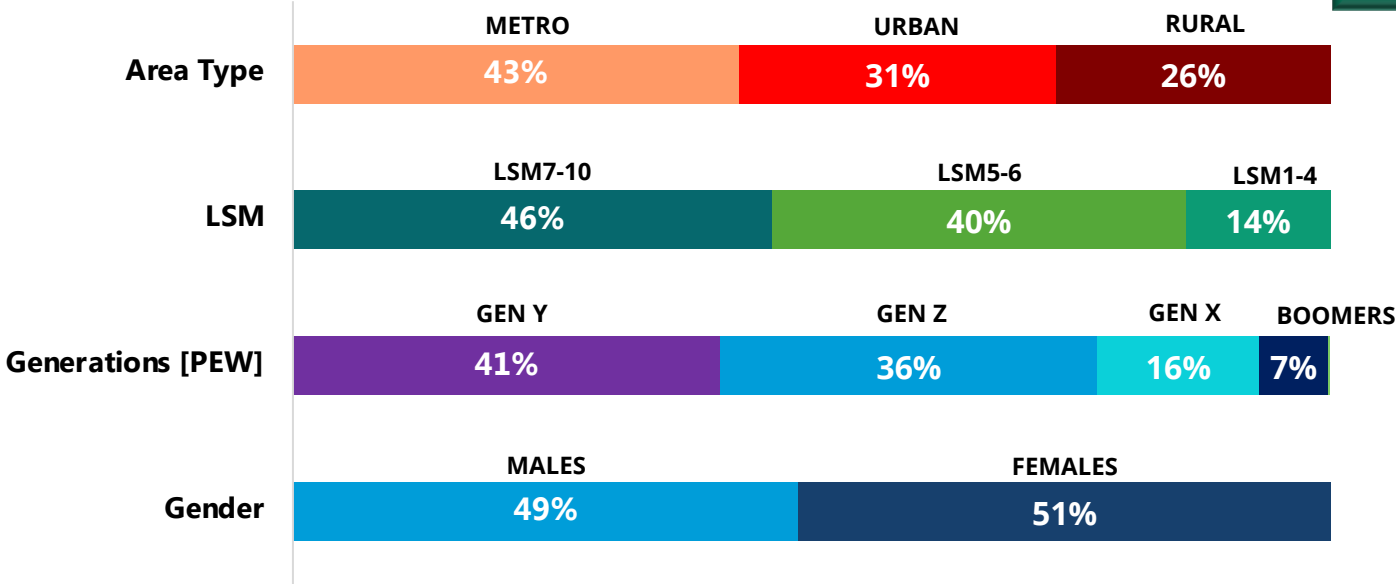


N =31 780 483

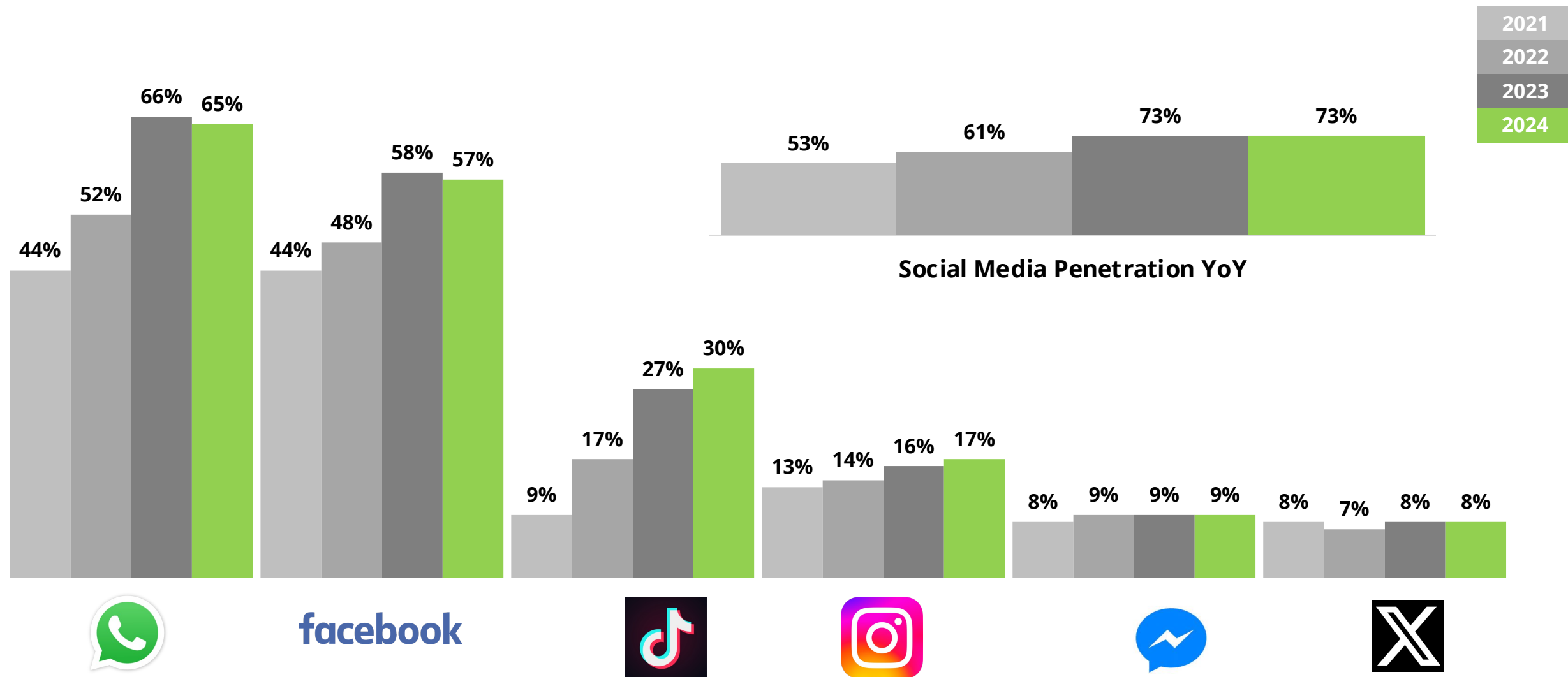
Social Media\* P4W



2024 Social Media Penetration (P4W) 73%

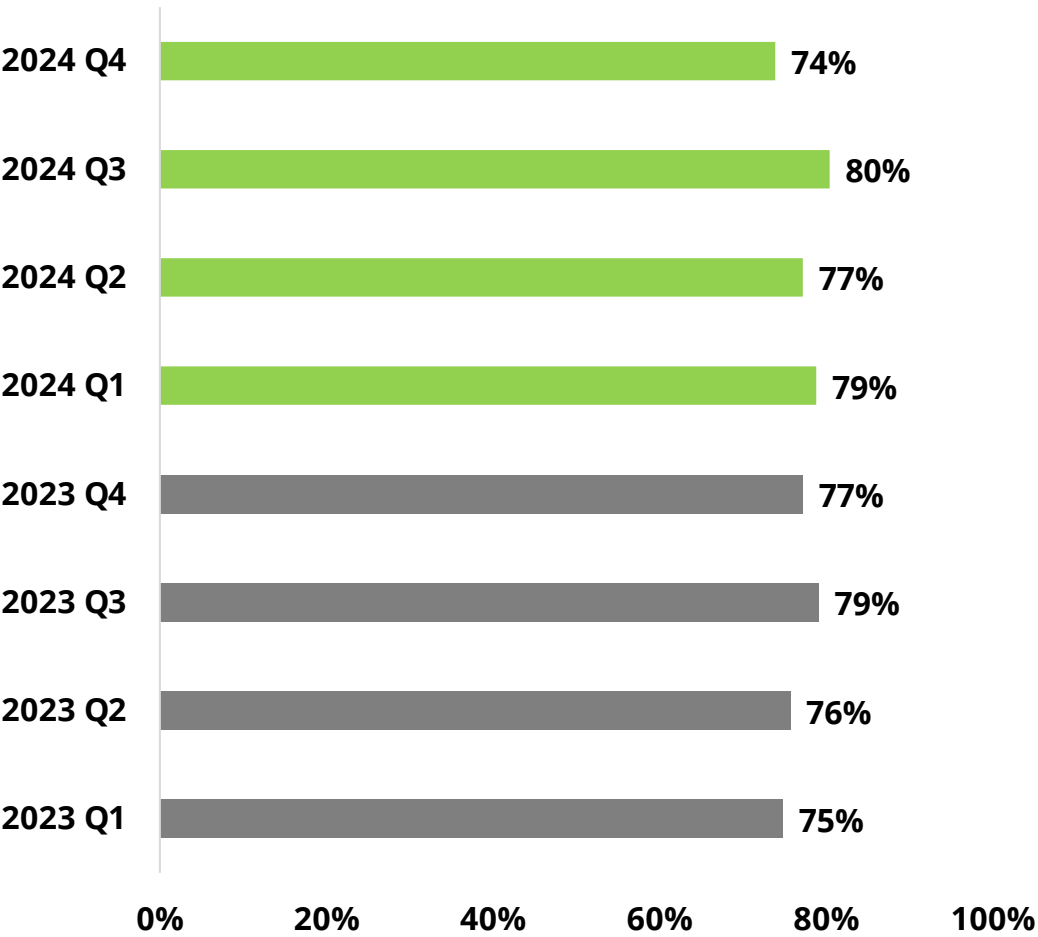


# SOCIAL MEDIA SHIFTS: % POP YoY

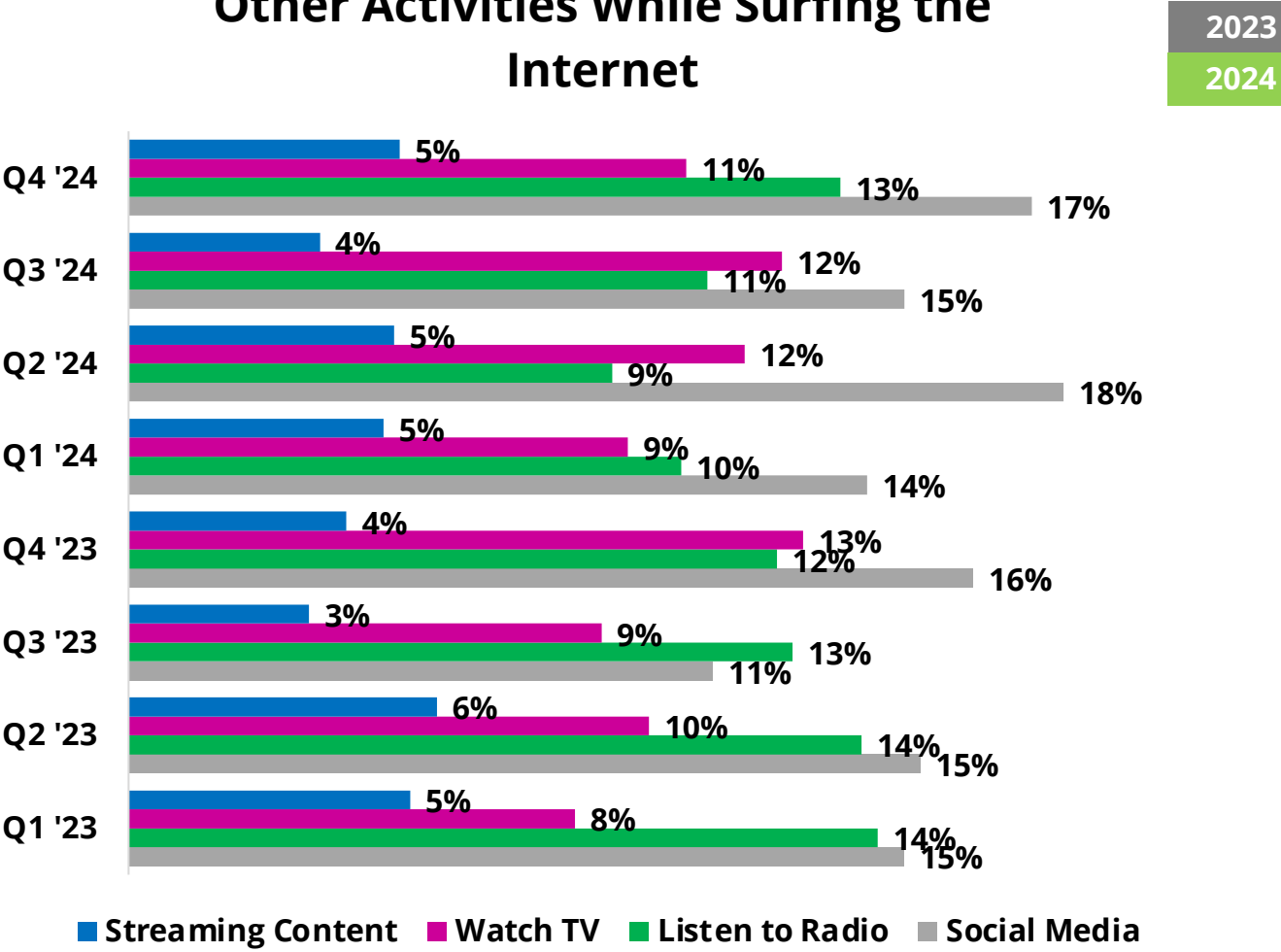


# INTERNET ACCESS / ACTIVITIES WHILE SURFING THE INTERNET

## Accessed Internet Past 7 Days

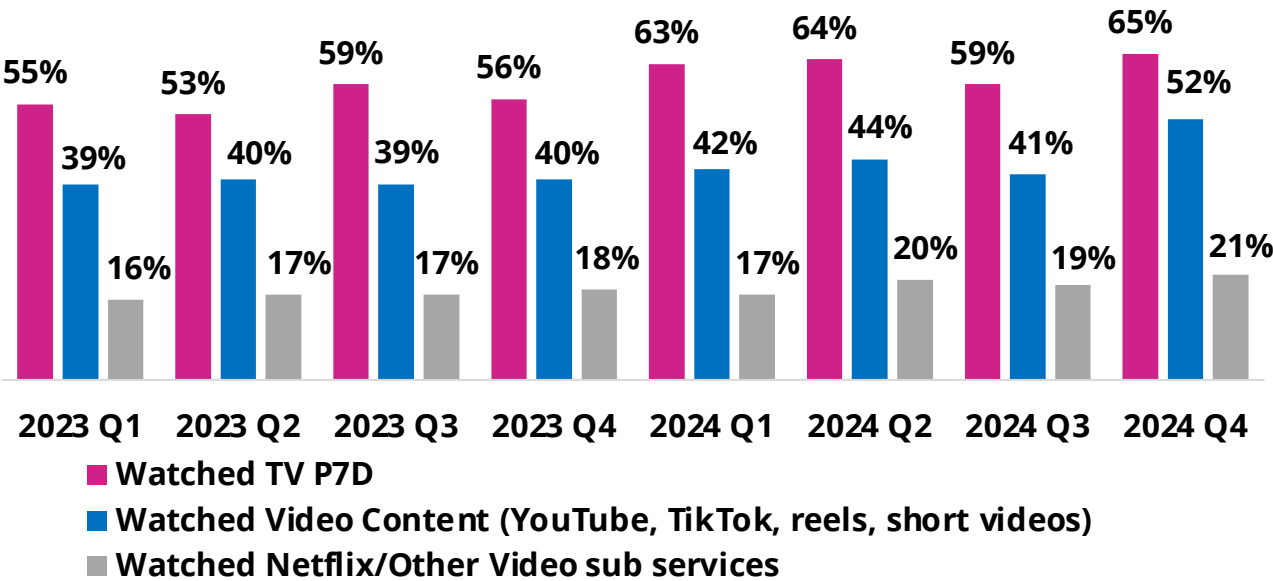


## Other Activities While Surfing the Internet

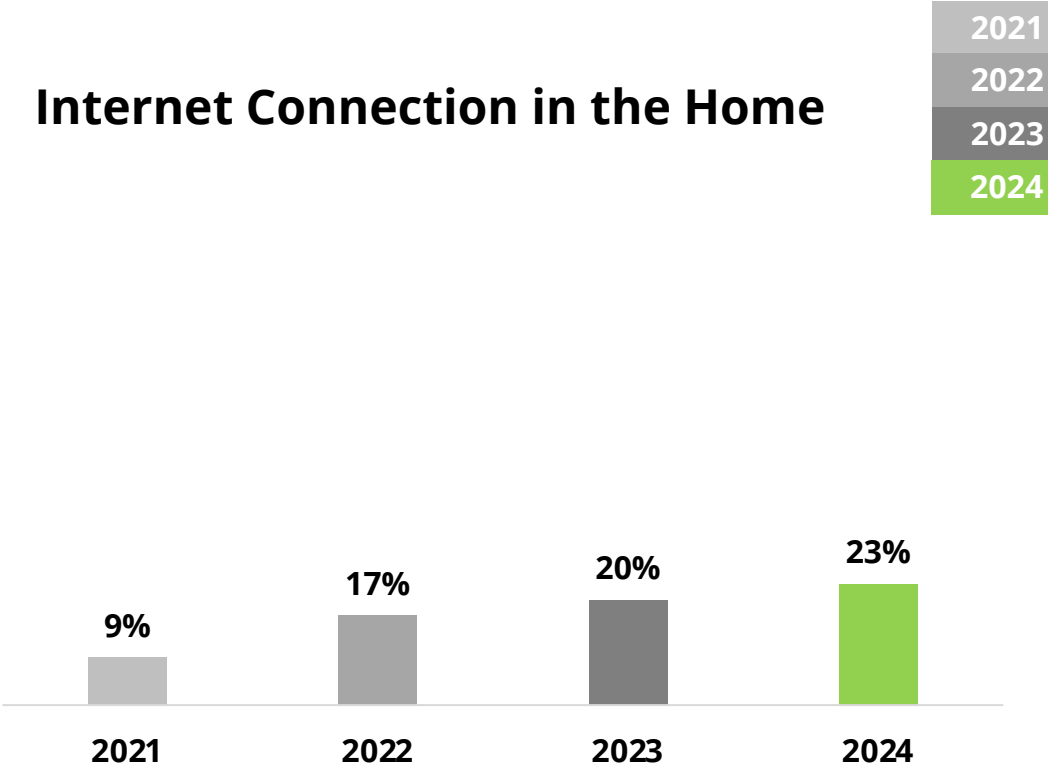




Video Content Viewing  
Total Population Filtered on Accessed  
Internet P7D



Internet Connection in the Home



4,3m Households now have fixed internet access, an increase of 37% increase between Year 2 and Year 4

84% of people who watched video content visited these social media platforms in the past seven days.



# RADIO LANDSCAPE (P7D)

**11%** of people spend **more than 20 hours** per week listening to the radio

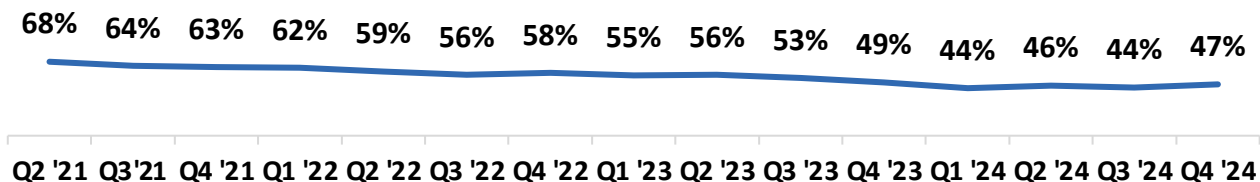
**634K** spend **more than 20 hours** per week listening to a podcast

**17M** listened to **Commercial Stations (P7D)**

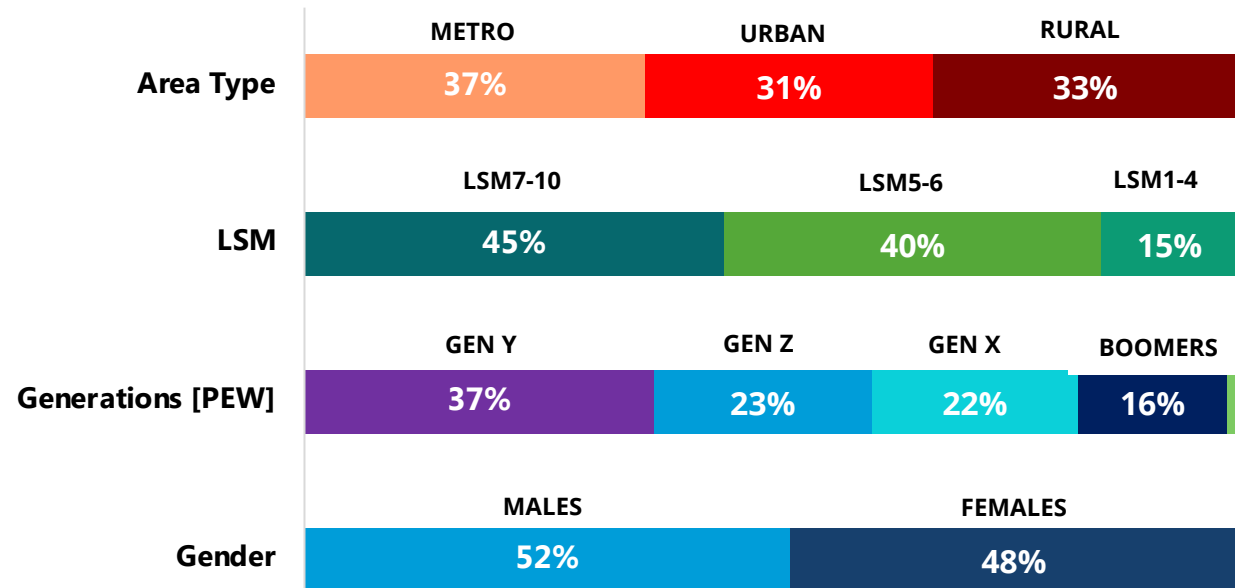
**4M** listened to **Community Stations (P7D)**

**\*77K** listened to **Internet radio stations (P7D)**

## Listened to radio stations\*P7D



**2024**  
Radio  
Penetration  
(P7D)  
**45%**



## P7D: TOP 5 Radio Stations



**P7D**  
3.5M

**uMhlobo  
wenene fm** **P7D**  
2.3M



**P7D**  
2.0M



**P7D**  
1.8M

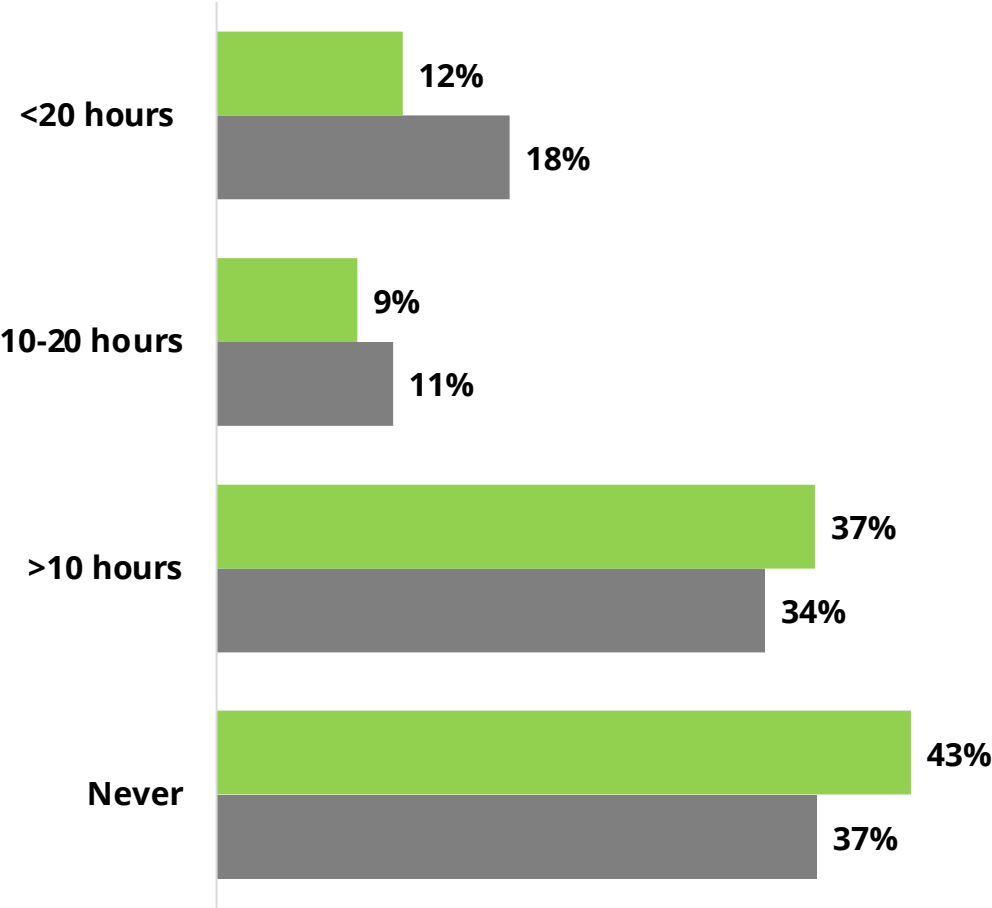


**P7D**  
1.7M

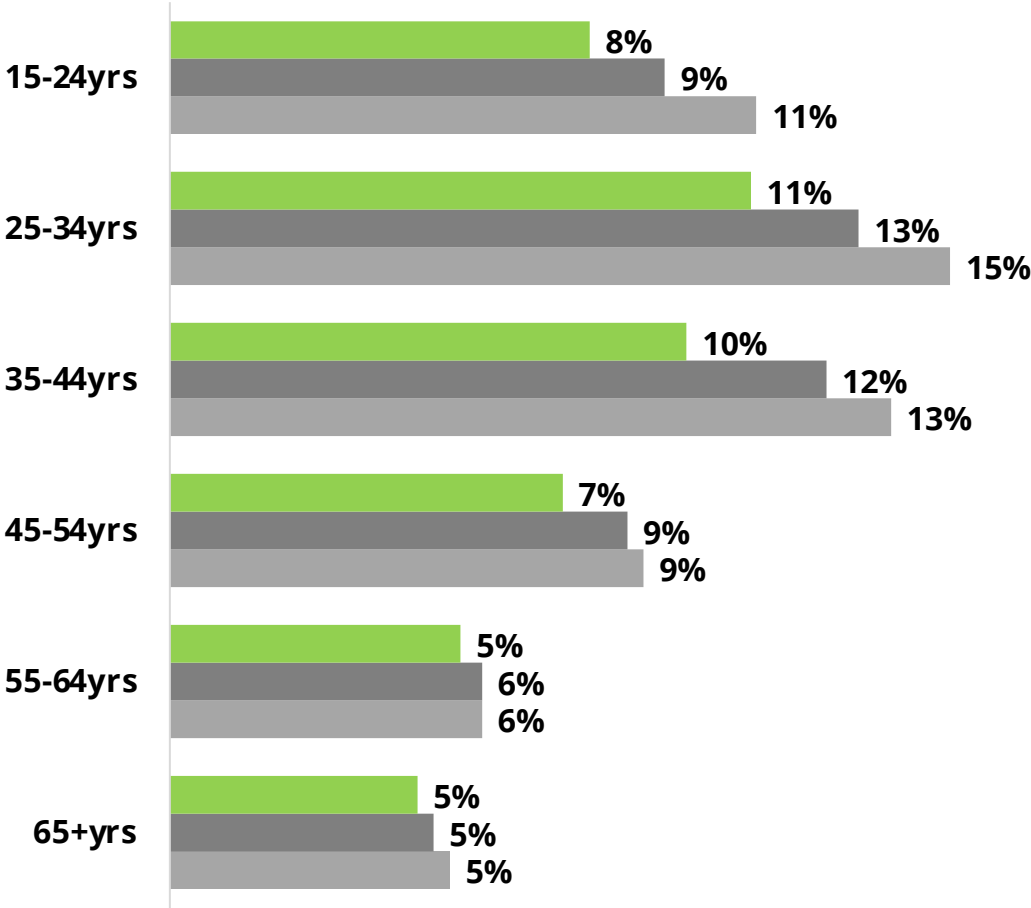
N=19 802 004

# RADIO HOURS LISTENED / LISTENING BY AGE GROUP

Hours Listened in Average Week



Listened P7D



2023

2024

# TOP 5 RADIO STATIONS P7D: % POP YoY

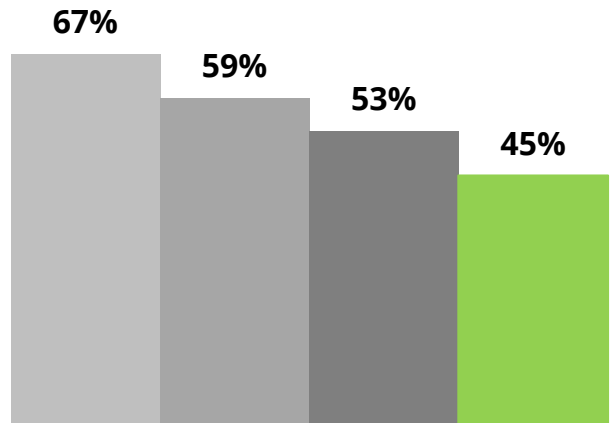
2021

2022

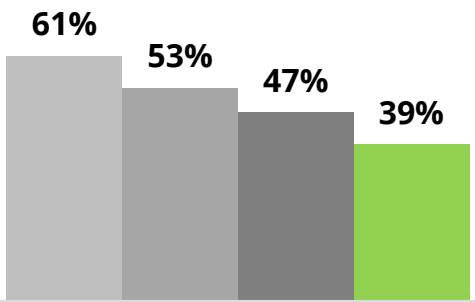
2023

2024

## Radio Category: Past 7 Days



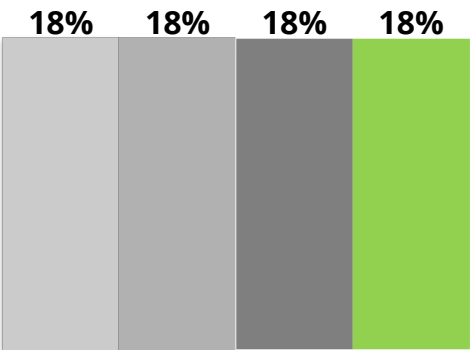
All Radio



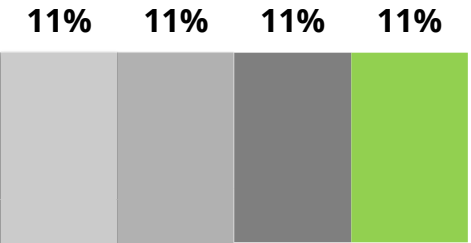
Commercial



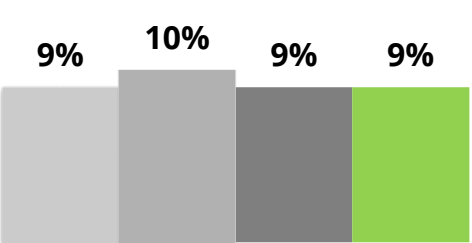
Community



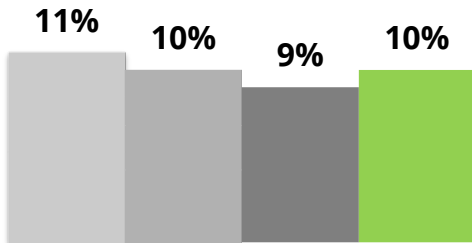
ukhozi  
luhamba phambili!



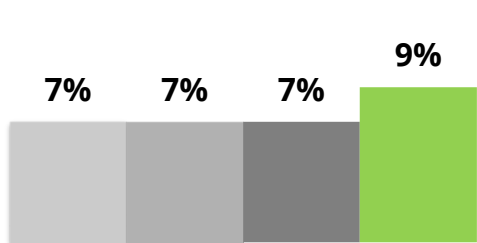
uMhlobo  
Wenene fm



METRO FM



LESEDI FM



Motsweding FM  
87.9 - 107.9



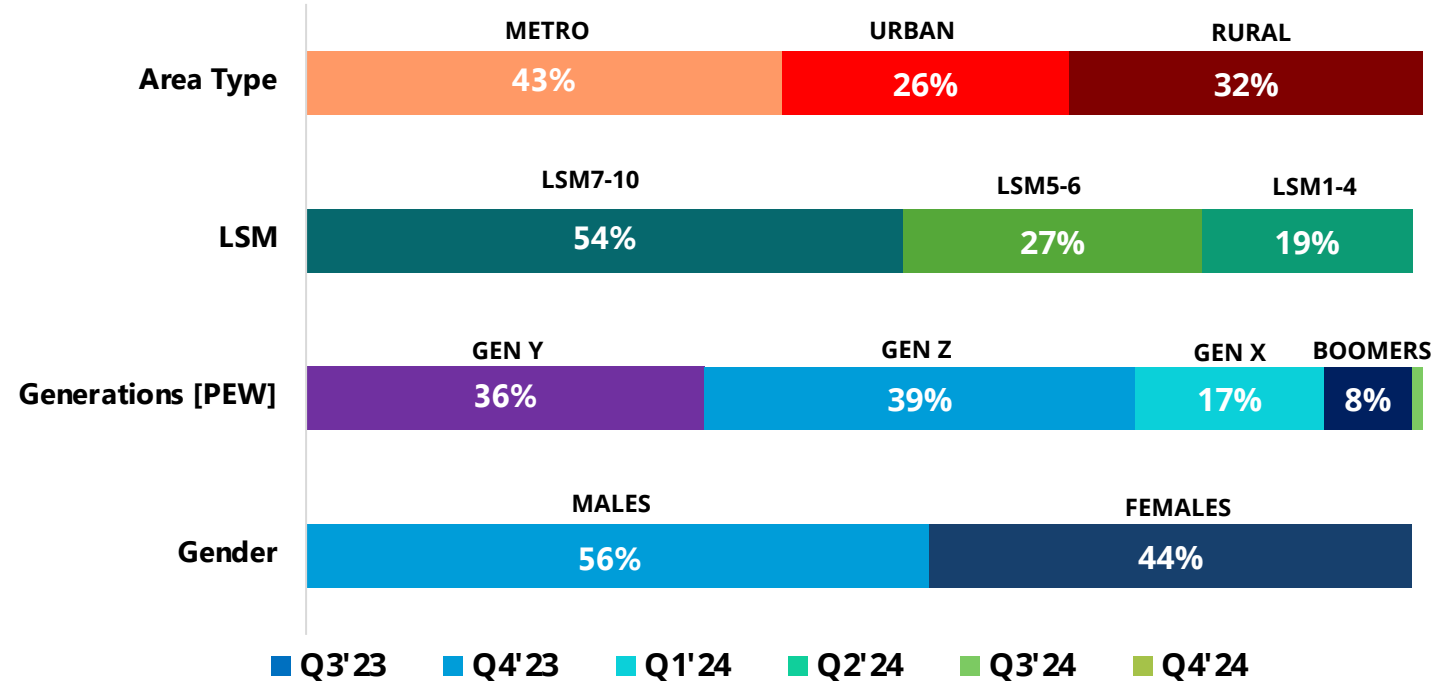
# AUDIO/ MUSIC STREAMING LANDSCAPE

**28%** People stream audio weekly.

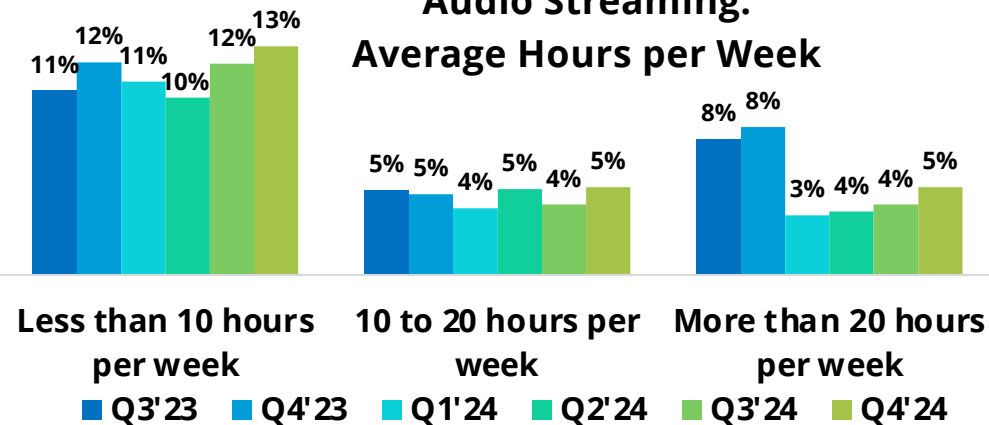
**20%** of people spend **more than 20 hours** per week streaming audio.

**12.2M** people **have access** to audio online streaming services.

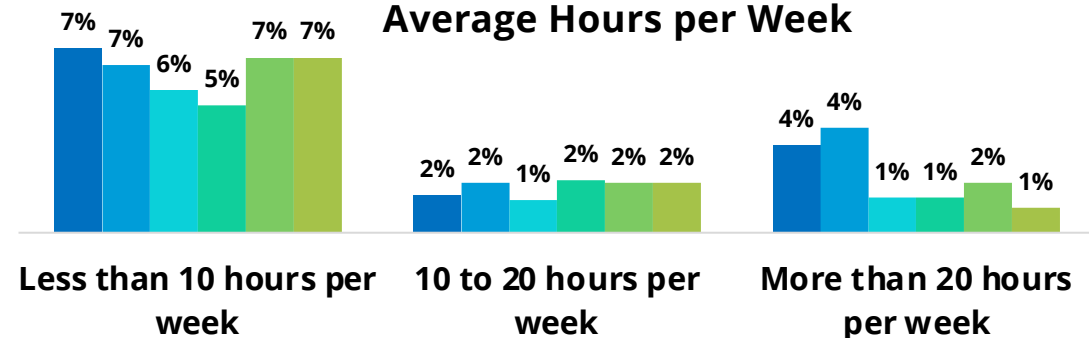
**5%** people **download vod/podcasts** weekly.



**Audio Streaming:  
Average Hours per Week**



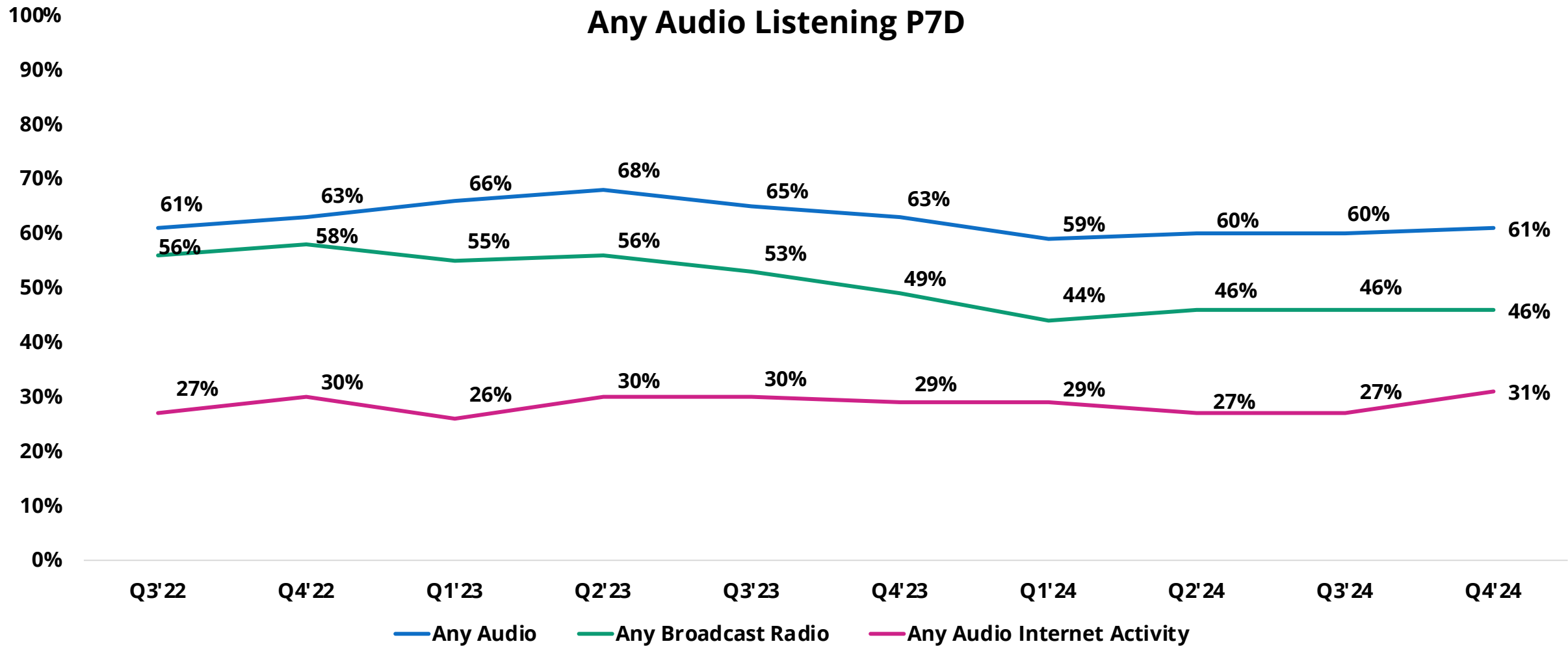
**Podcasts:  
Average Hours per Week**



N = 2 513 805

# ANY AUDIO LISTENING PAST 7 DAYS

## Any Audio Listening P7D



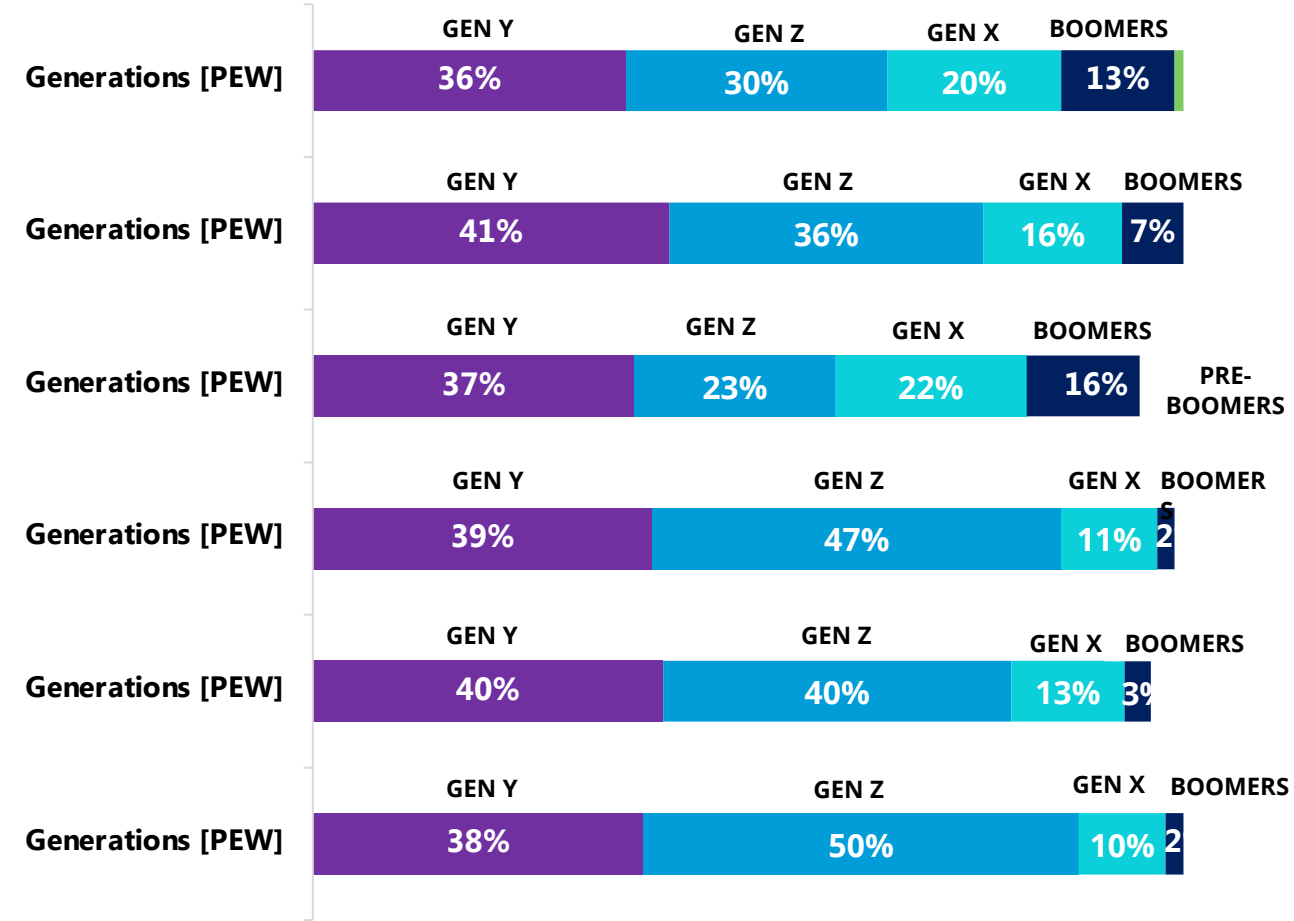
Any Audio Listening = Listened to Broadcast Radio P7D **OR** Internet Activity P7D Download Music **OR** Download Podcasts/Vodcasts **OR** Listen to Radio via Internet/App **OR** Stream Music

# ELECTRONIC MEDIA: PENETRATION & TIME SPENT (AVG. WEEK)



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	Time spent (avg. week)	% of Pop (1hr+ avg. week)	% Penetration (Annual)
TV:	<10hr: 56% 10hr+: 44%	69%	60% P7D
Social:	<10hr: 40% 10hr+: 60%	67%	73% P4W
Any Radio:	<10hr: 65% 10hr+: 35%	57%	45% P7D
Audio Streaming:	<10hr: 58% 10hr+: 42%	20%	28% Weekly
Video Streaming:	<10hr: 49% 10hr+: 51%	18%	35% P7D
Podcasts:	<10hr: 66% 10hr+: 34%	9%	5% Weekly



# CINEMA LANDSCAPE

**517K** people regularly go to the  
**Cinema** once every 2 to 3 months.



**R423**  
average  
cinema outing  
cost.

## TOP 4 Cinema Chains Visited



**725K** Visited  
most often

**NuMetro**

**698K** Visited  
most often

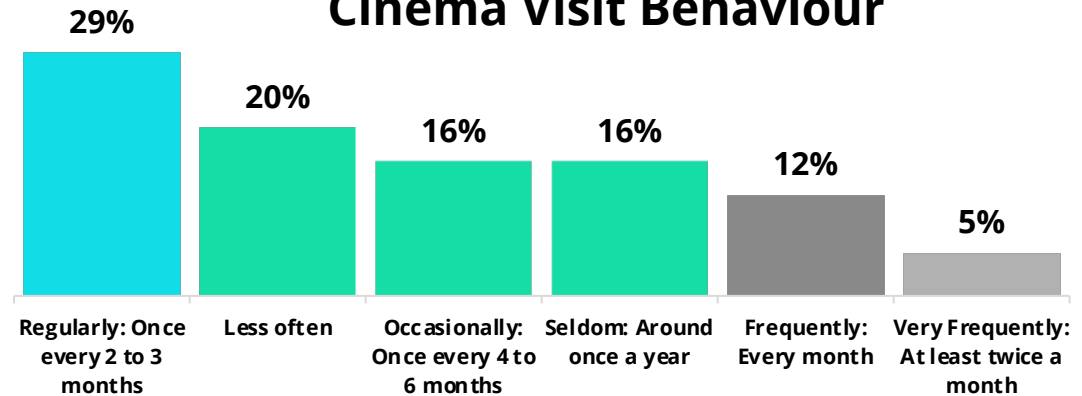
**movies@**

**158K** Visited  
most often



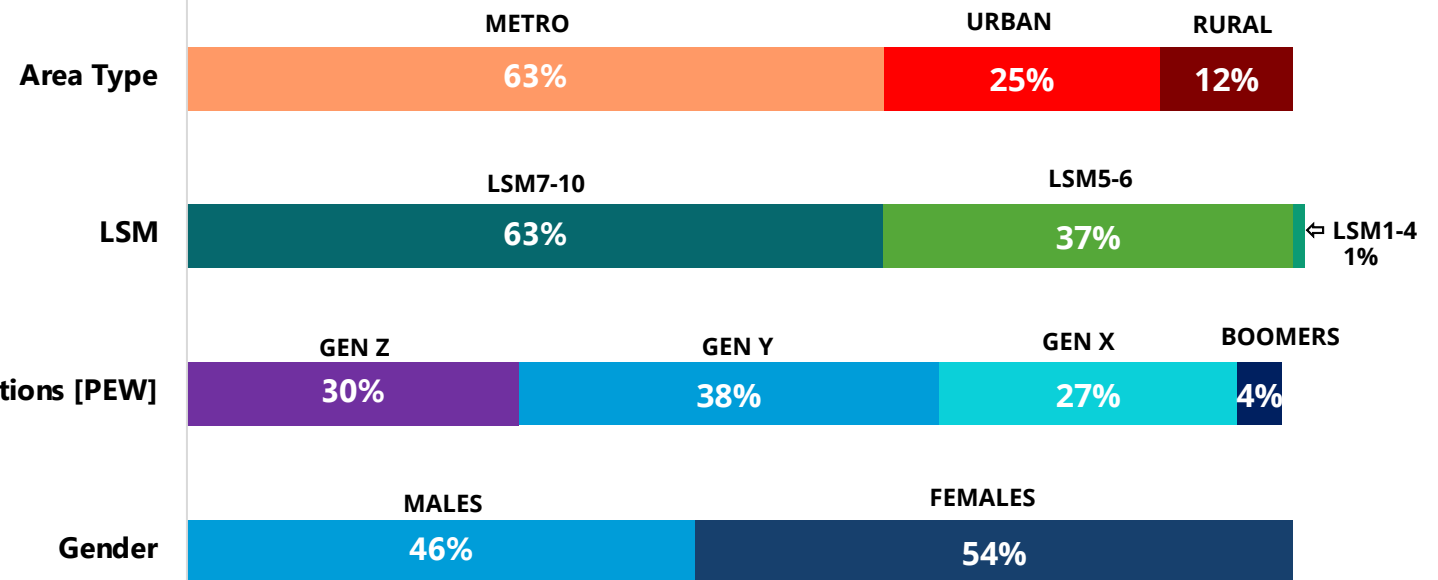
**67K** Visited  
most often

## Cinema Visit Behaviour



**2024**  
Cinema  
Penetration  
(P4W)  
**2%**

N = 110 352



N= 756 063



# MAGAZINE LANDSCAPE (P3M)

**3.4M** People read magazines in the  
(P3M)

## Top 4 Magazines

**DRUM**

**19%** Read P3M

**HUIS  
genoot**

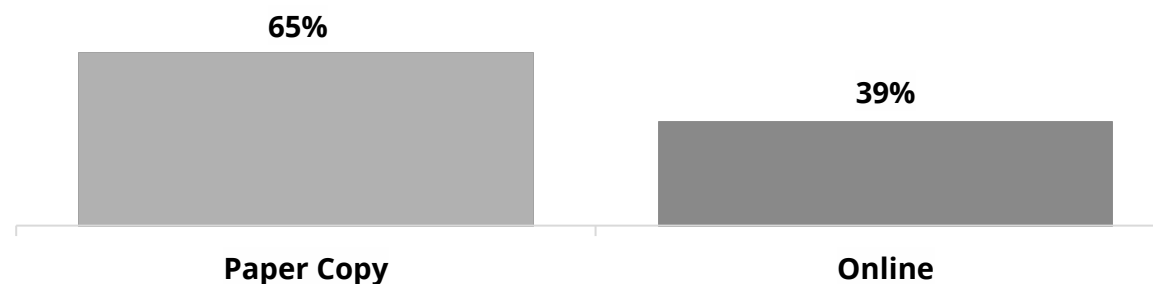
**10%** Read P3M

**YOU**

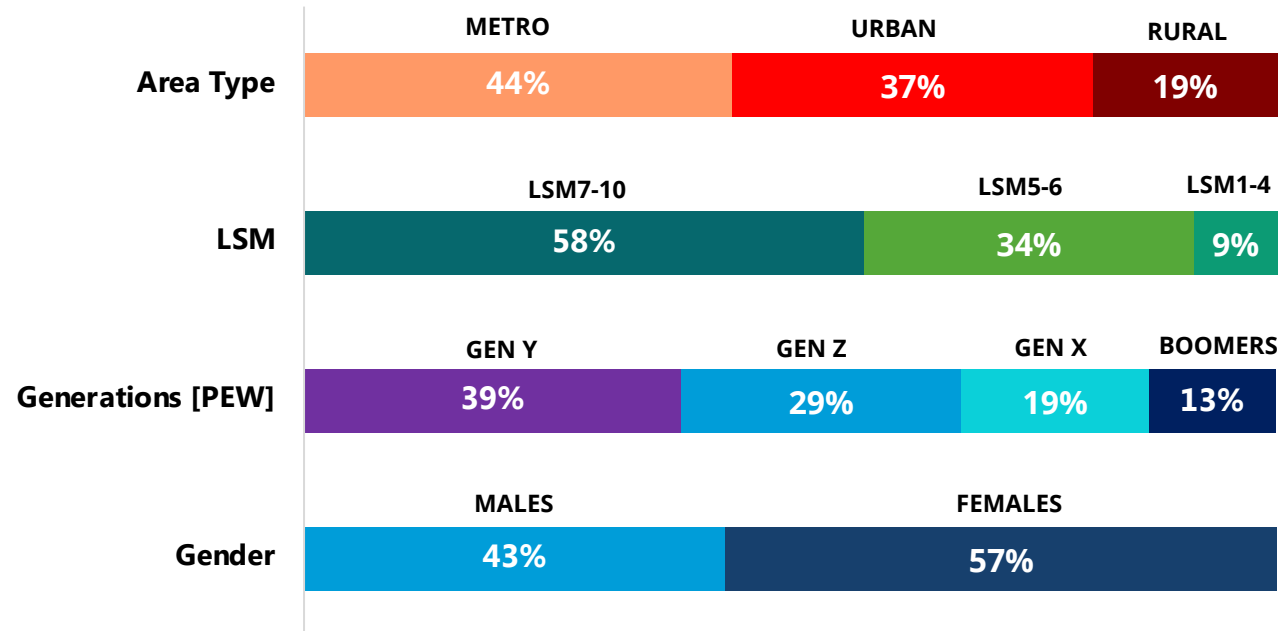
**10%** Read P3M

**Kuier**

**7%** Read P3M



**2024**  
Magazine  
Penetration  
(P3M)  
**8%**



**2024**  
Magazine  
AIR  
Penetration  
(ANY)  
**4%**

N = 3 432 737

# STORE MAGAZINE LANDSCAPE (P3M)

**5.0M** People read Store magazines in the **(P3M)**

## Top 4 Store Magazines



**1.5M** Read P3M



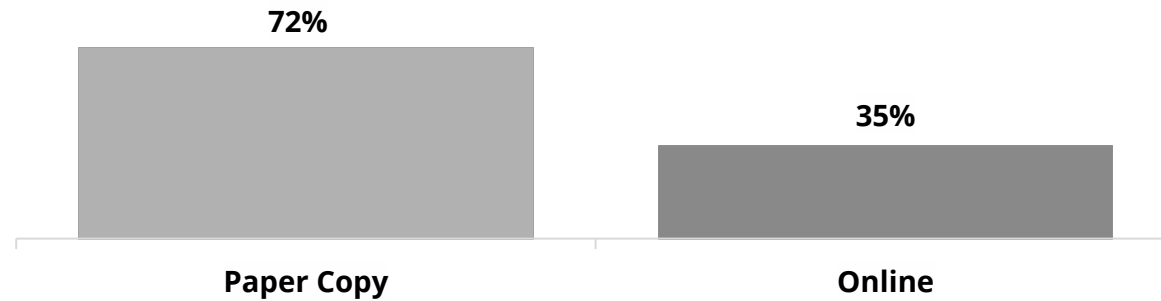
**1.3M** Read P3M



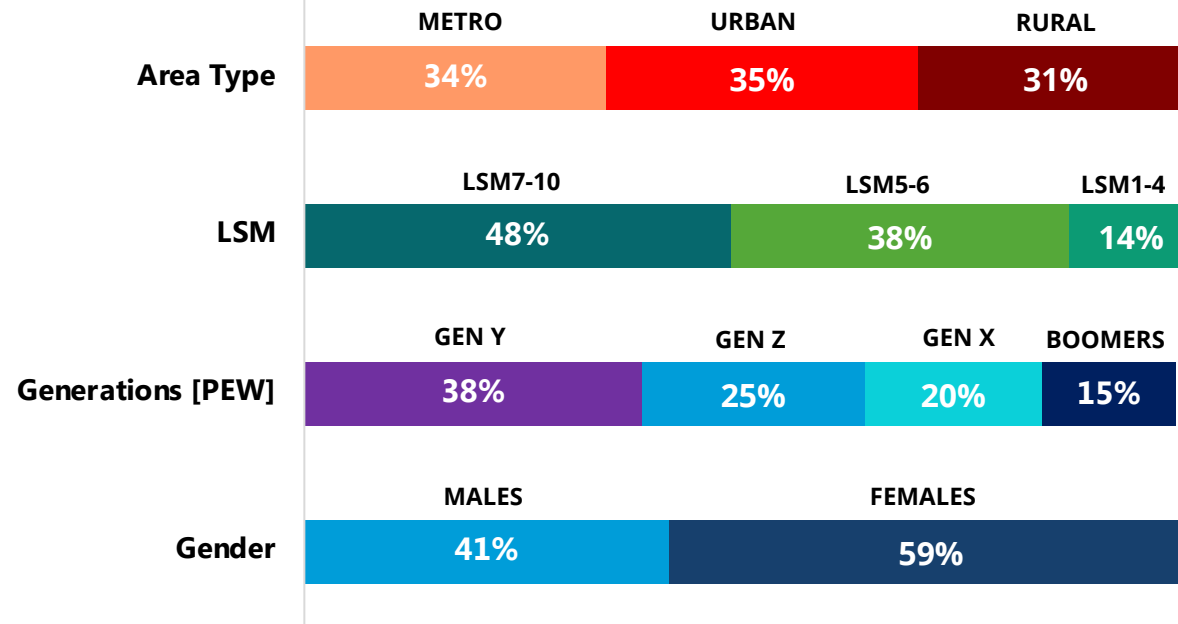
**1.2M** Read P3M



**0.9M** Read P3M



**2024**  
Store Magazine  
Penetration  
(P3M)  
**12%**



**2024**  
Store Magazine  
AIR  
Penetration  
(ANY)  
**4%**

N = 5 041 130

# NEWSPAPER LANDSCAPE (P3M)

9.5M People read Newspapers in  
the (P3M)

## Top 4 Daily Newspapers



2.2M Read P3M



1.4M Read P3M

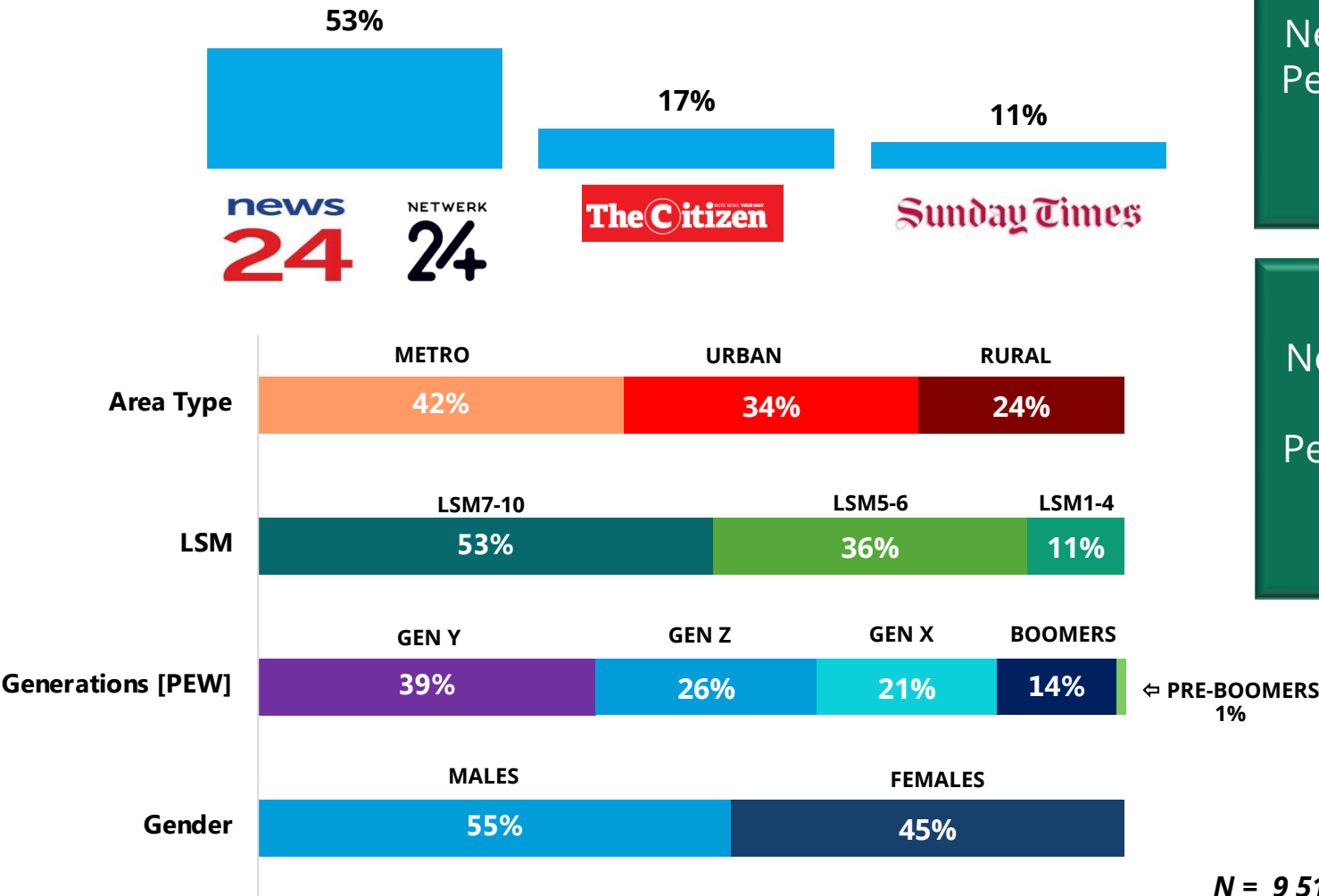
Sowetan

527K Read P3M



599K Read P3M

## PAID NEWS ACCESS

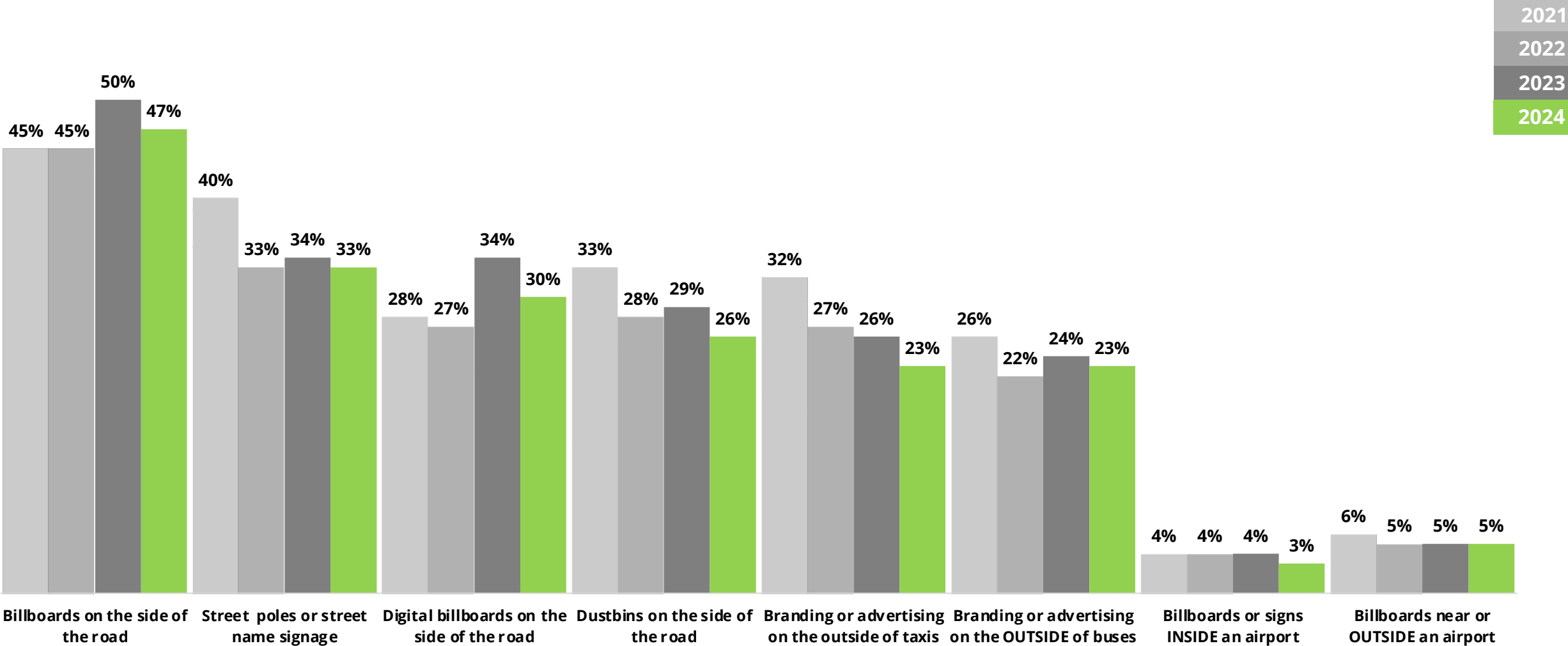


2024  
Newspaper  
Penetration  
(P3M)  
22%

2024  
Newspaper  
AIR  
Penetration  
(ANY)  
6%

N = 9 519 016

# OUT OF HOME P4W SHIFTS: % POP YoY





# Financial Services



MARKETING RESEARCH  
FOUNDATION

---

**PLUS 94**  
**RESEARCH**

# FINANCIAL SERVICES AND INSURANCE COVER



**73%** have a **bank**  
account excluding the  
**SASSA** accounts



**57%** of **medical aid cover**  
respondents are the main  
members.

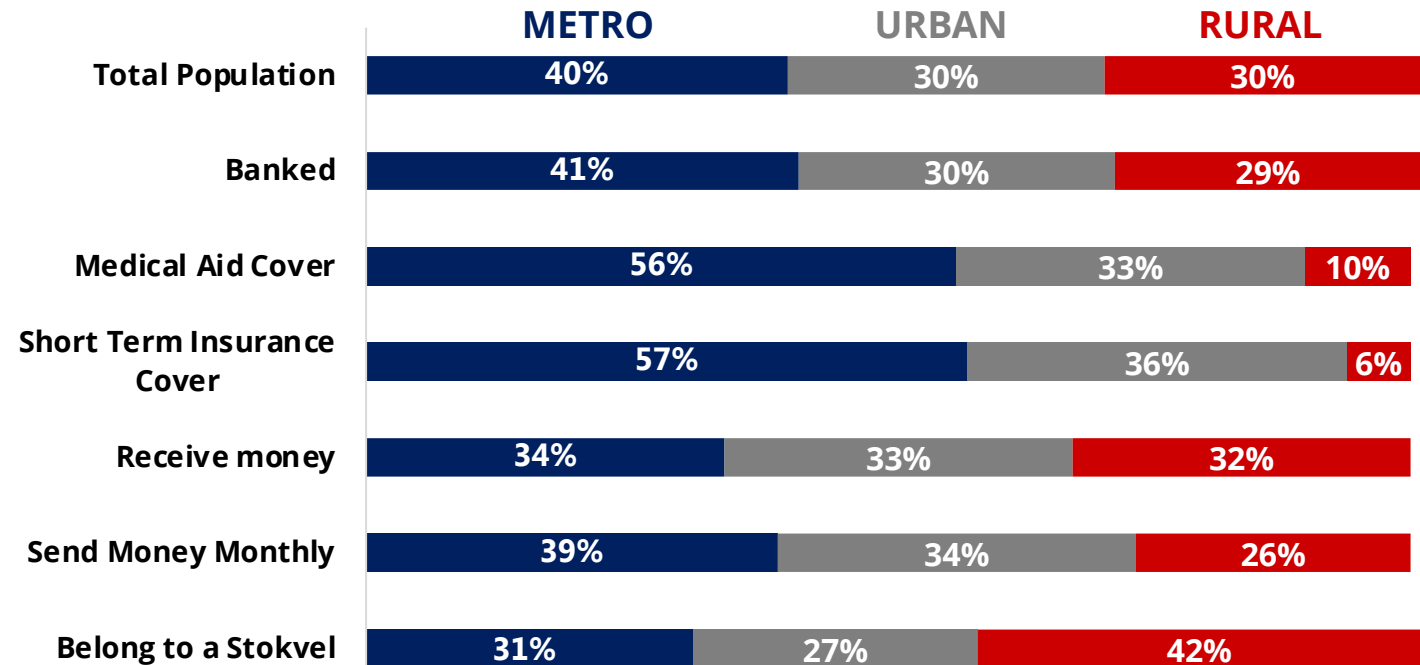


**36%** are insured

**32%** 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 **R1043** is sent.

**7.7%** belong  
to a stokvel.

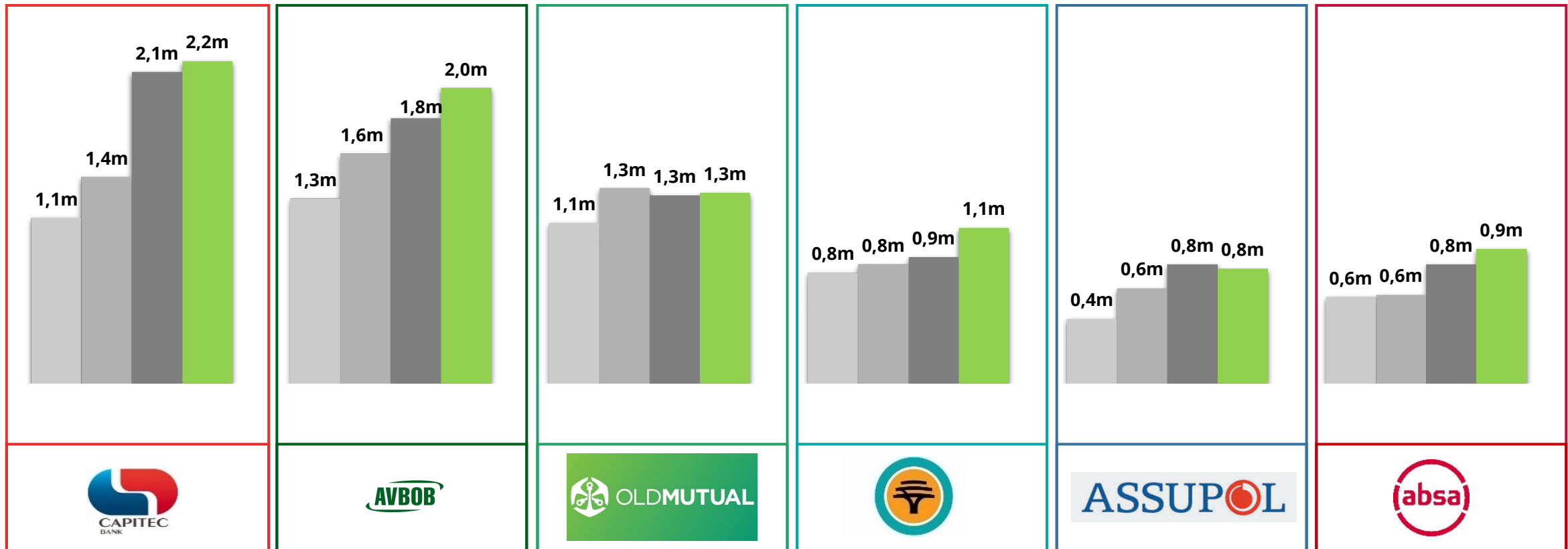
# ANY INSURANCE BY COMPANY USED: YoY

2021

2022

2023

2024



\* Medical insurance (not medical aid) is included in overall insurance calculation.

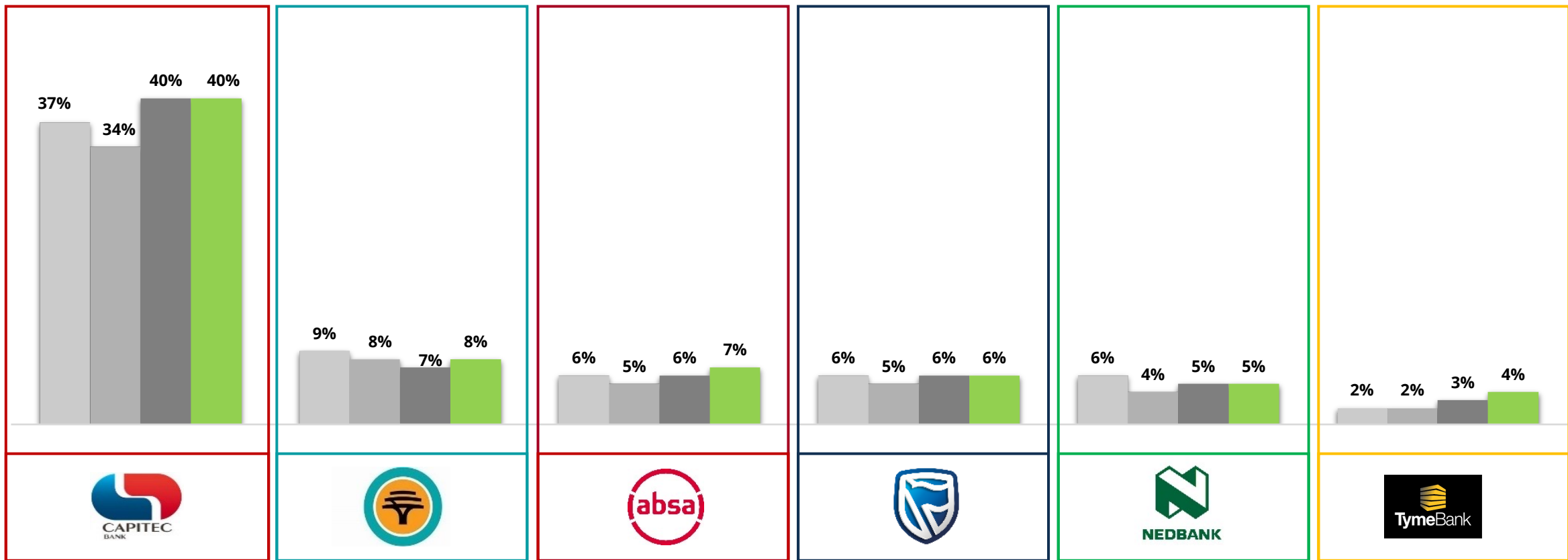
# PRIMARY BANK: YoY

2021

2022

2023

2024





# Retail



MARKETING RESEARCH  
FOUNDATION

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**PLUS 94**  
**RESEARCH**

# CELLPHONE NETWORK AND SIM PREFERENCES



**80%** people spent **R300 or less** and **18%** 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



**43%** use this network



**35%** use this network

**Telkom**

**13%** use this network



**9%** use this network

N = 42 733 878

## SIM Options

\*For phones 1 and 2

**93%** cellphones on Prepaid

**4%** cellphones on Contract

**3%** cellphones on Top Up

N = 43 018 565

## Buying Preference

\*For phones 1 and 2

**52%** Buy both Airtime and Data

**44%** Buy Airtime

**5%** Buy Data bundles only

N = 43 018 565

## Top 3 online shopping categories [P4W]

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

**929K most often** use food  
delivery service when  
purchasing take-aways.



**P4W**  
**273K**

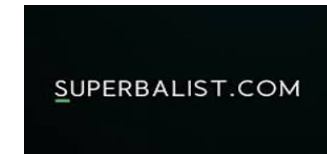


**P4W**  
**271K**

CLOTHING  
PURCHASE  
ONLY\*

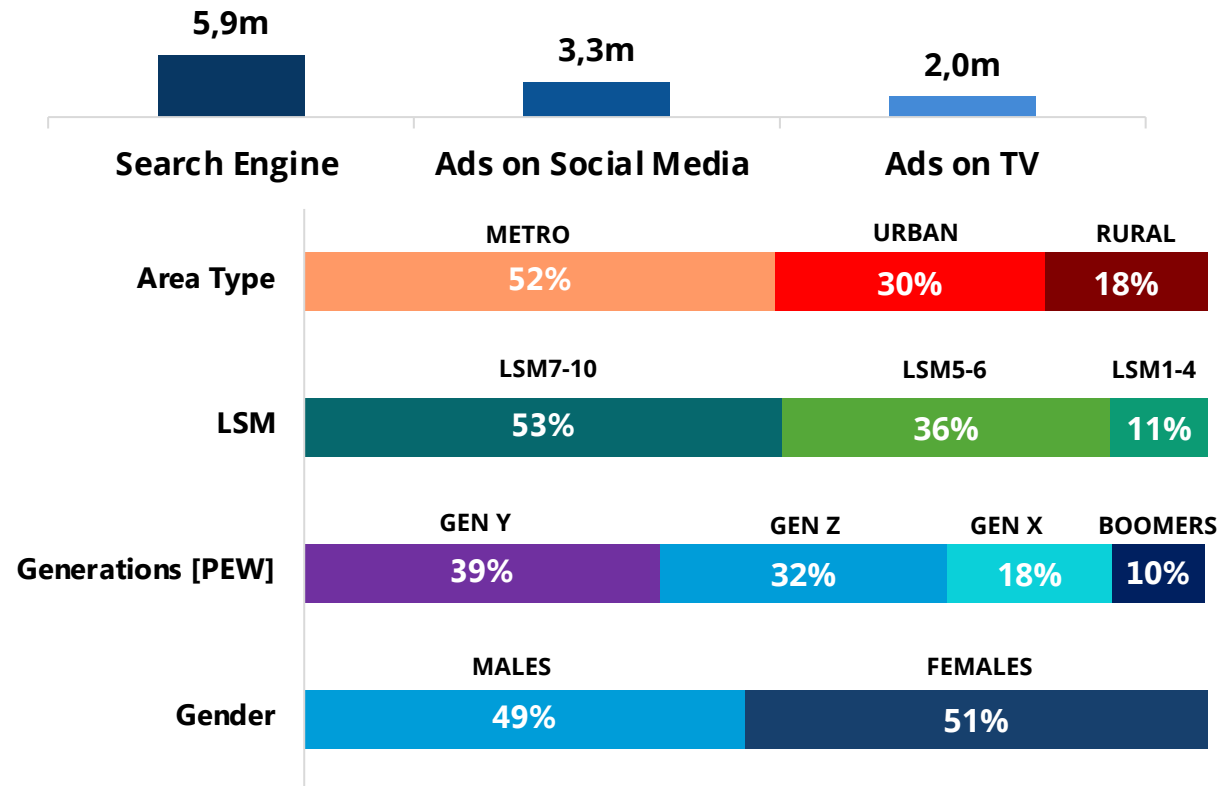


**P3M**  
**549K\***



**P3M**  
**50K\***

## \*How do you discover new brands?



**2024**  
E-Commerce  
Penetration  
(P4W)  
**22%**

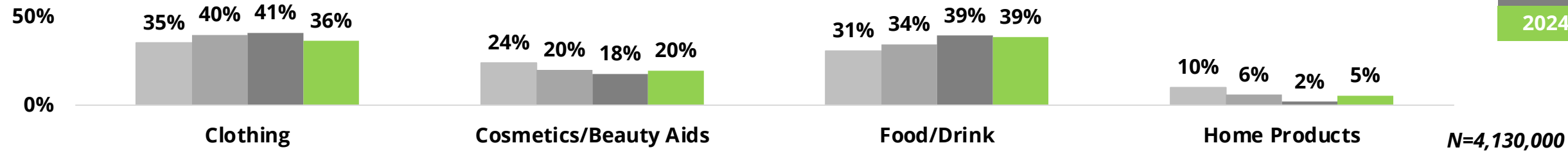
**20%**  
Research Brands  
before purchasing

N=9 157 119

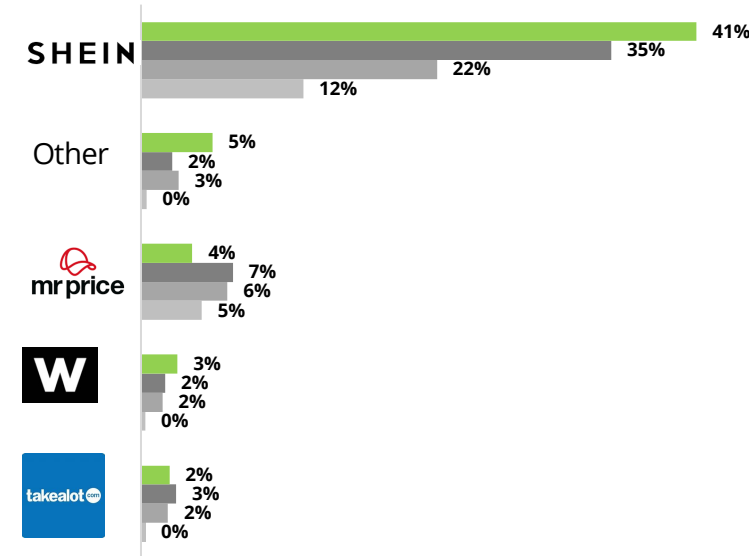
# CLOTHING: ONLINE SHOPPING

100%

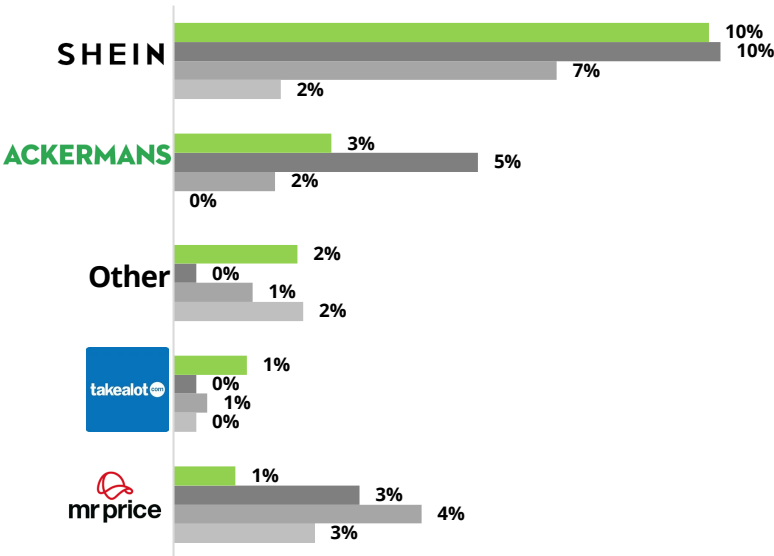
## Bought Online Past 4 Weeks



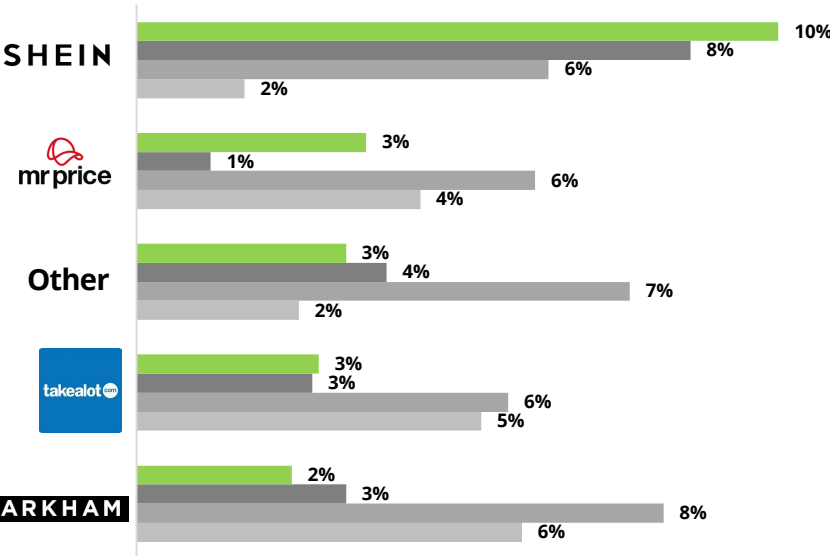
## Top Online Retailers: Women



## Top Online Retailers: Children



## Top Online Retailers: Men



# CLOTHING AVERAGE ANNUAL SPEND / BOUGHT PAST 3 MONTHS

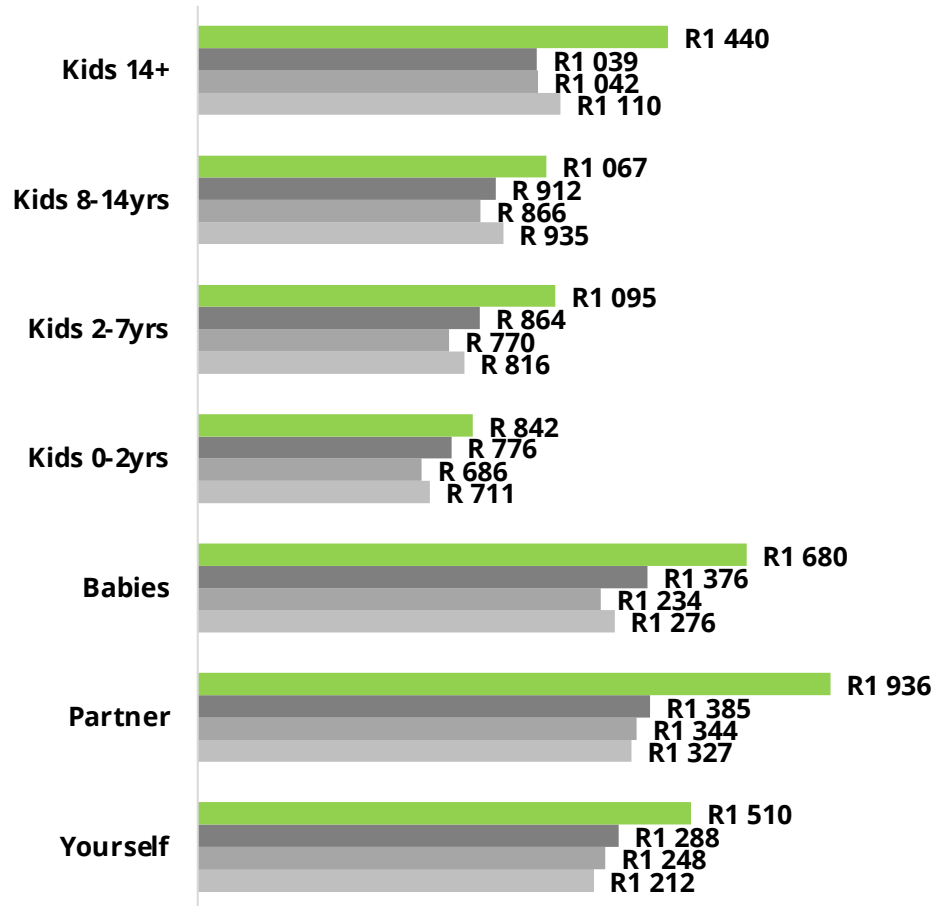
2021

2022

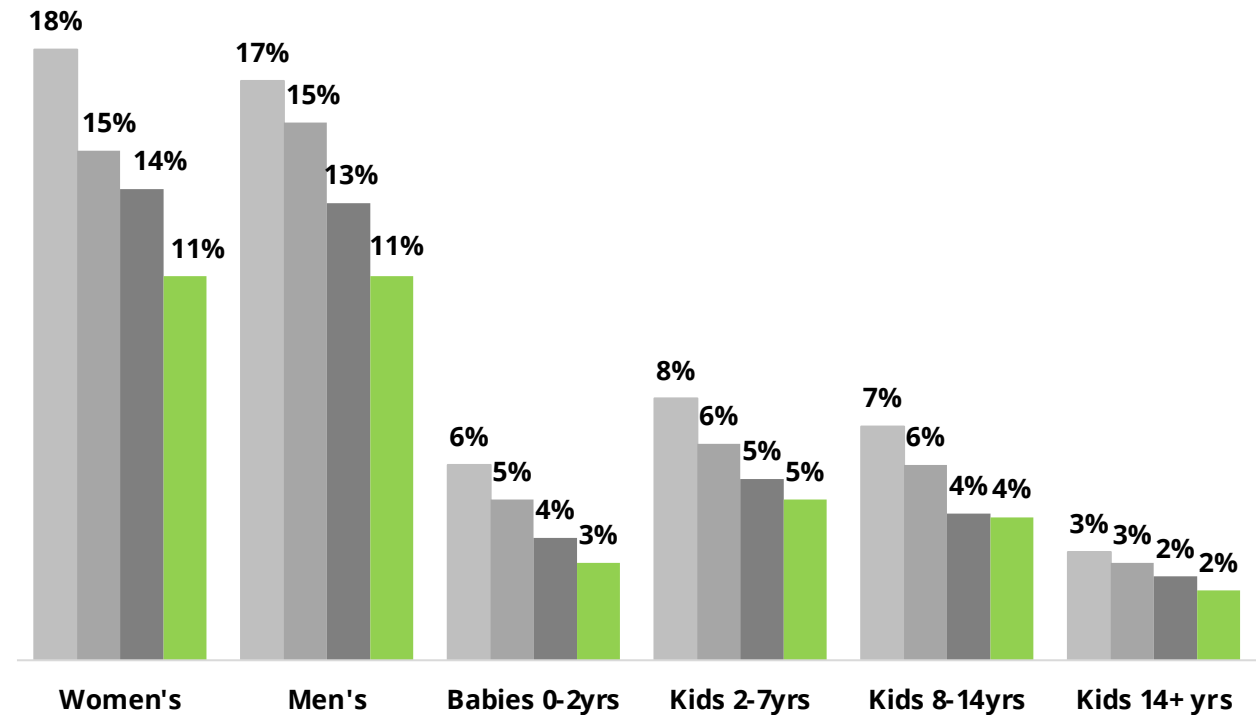
2023

2024

## Clothing Average Spend P12m



## Clothing Bought P3M





# FOOD LANDSCAPE



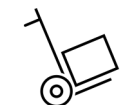
**46%** bought fast food P4W



**R217** average spend on fast food on last restaurant visit.

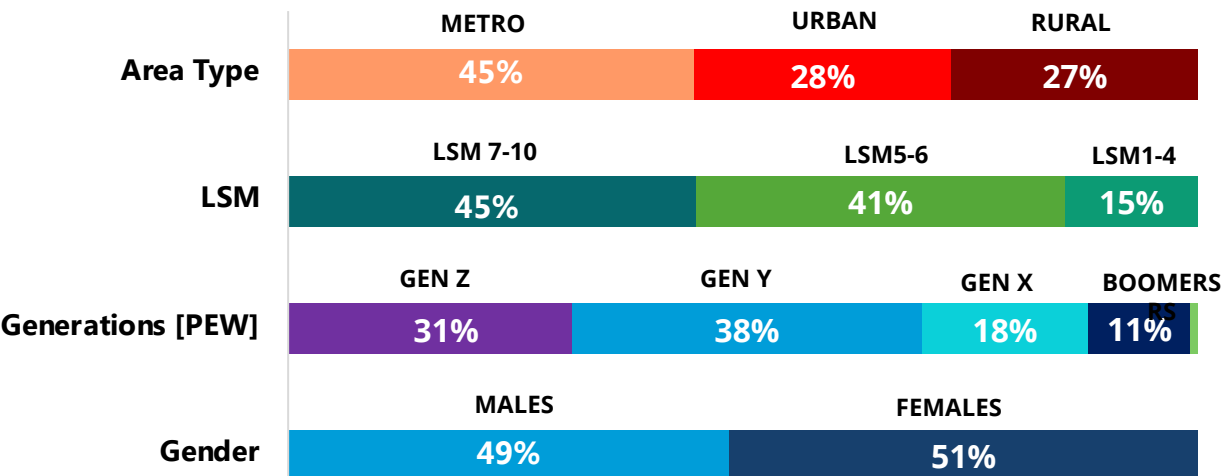


**3** average party size on last restaurant outing.

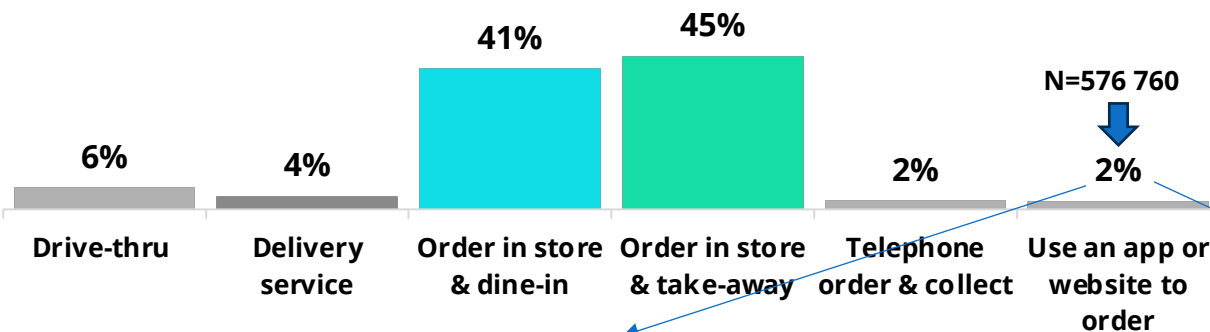


**924K** use Fast Food delivery services.

## Fast Food Purchases N=20 043 500



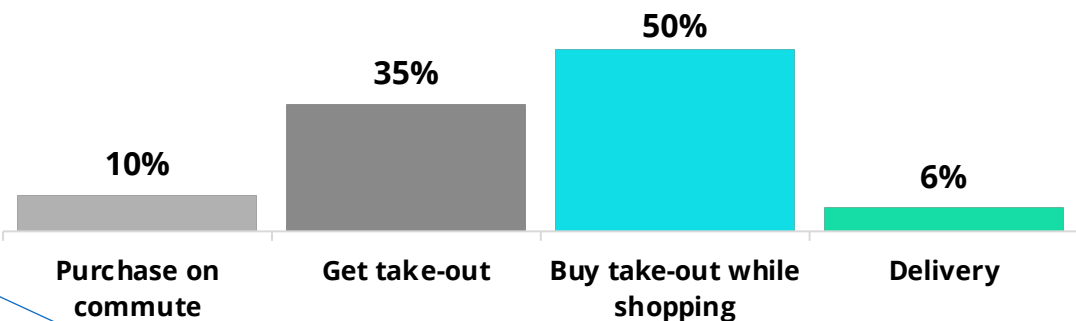
## Most often used method to order food N=25 648 388



Uber  
Eats

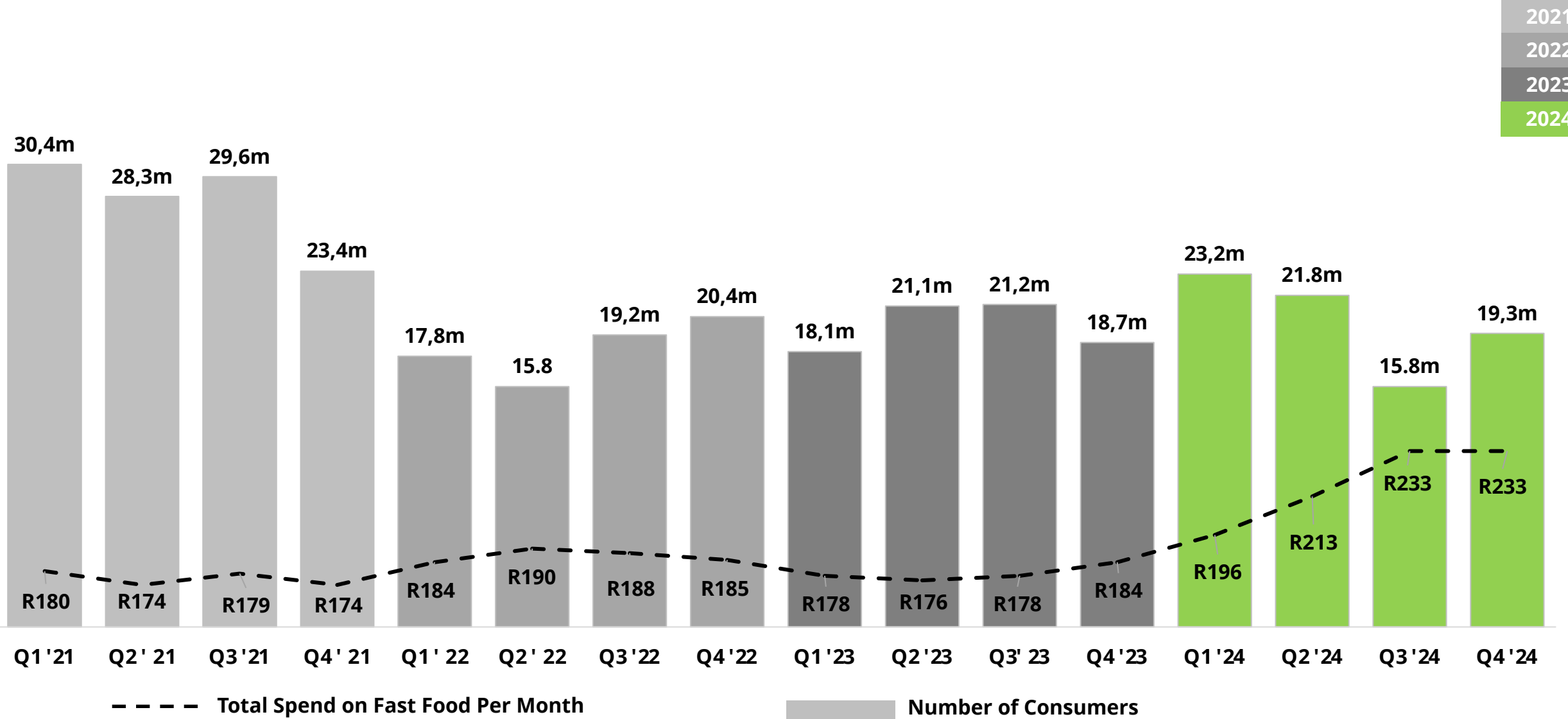
**38% (P4W)** order from  
Uber Eats

## Buying behaviour N= 21 523 902

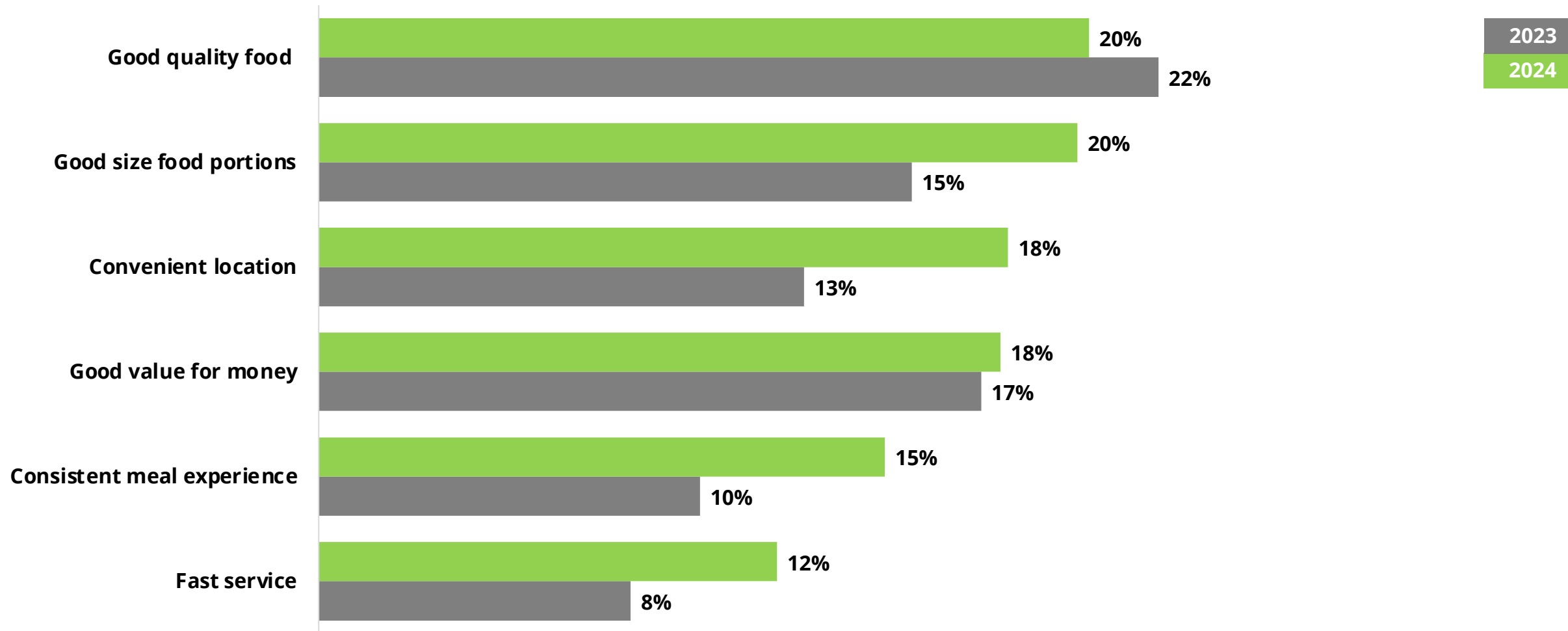


**29% (P4W)** order  
from Mr. D

# FAST FOOD CONSUMPTION AND EXPENDITURE (LAST VISIT): QoQ



# FAST FOOD: WHAT FACTORS INFLUENCE YOUR DECISION OF OUTLET



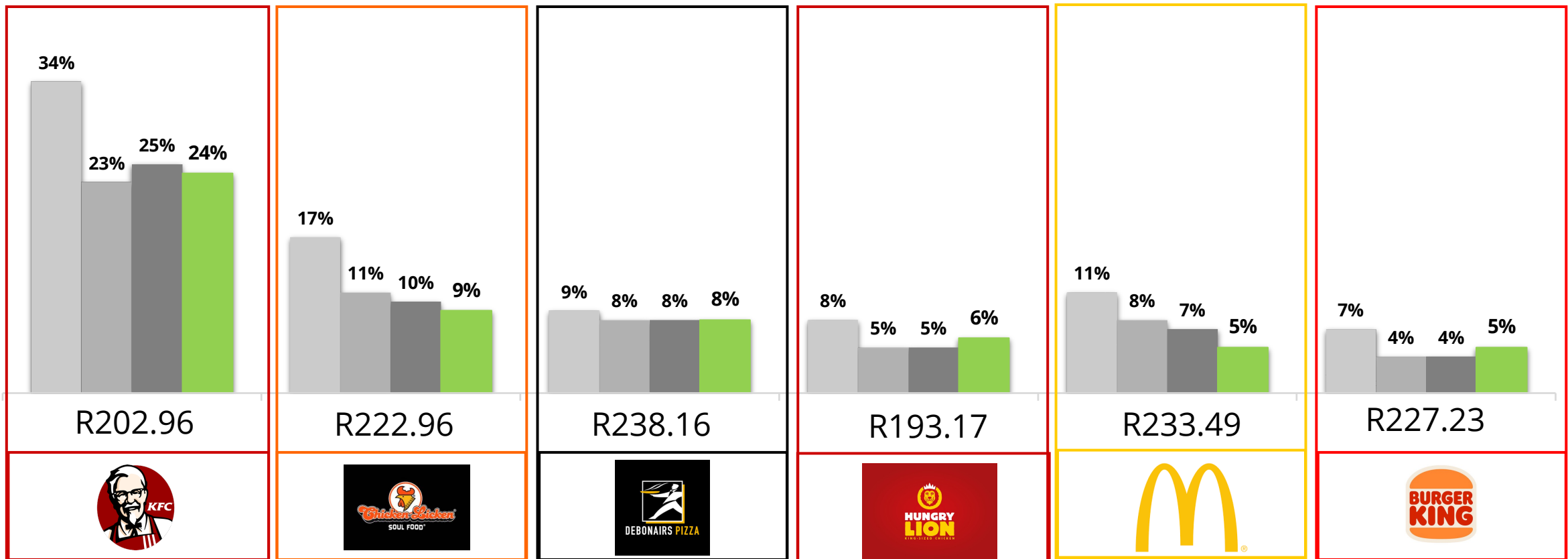
# TOP 6 FAST FOOD BRANDS AND AVERAGE SPEND: YoY

2021

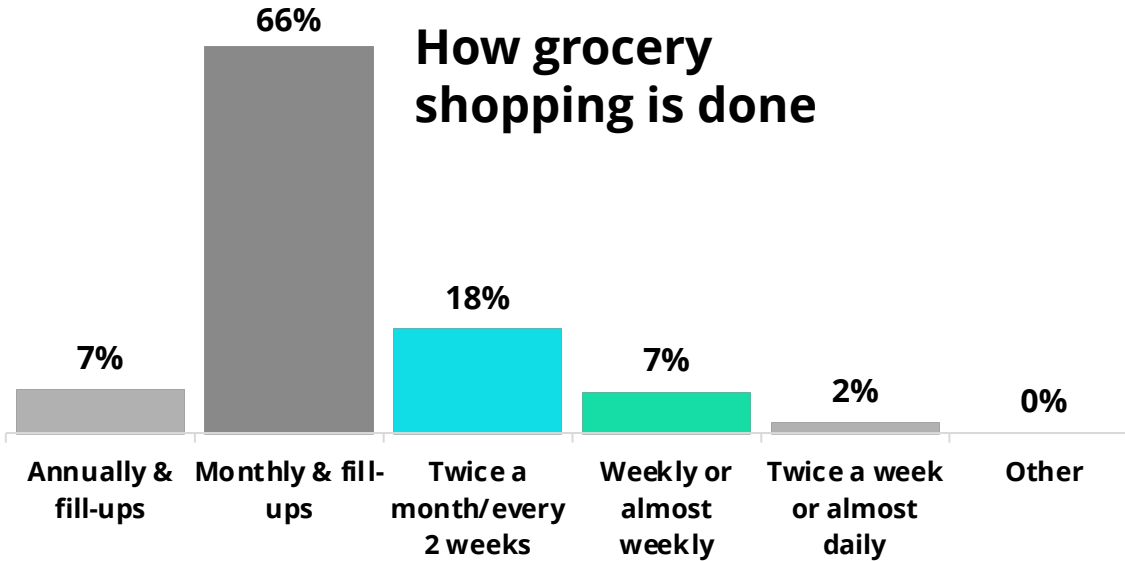
2022

2023

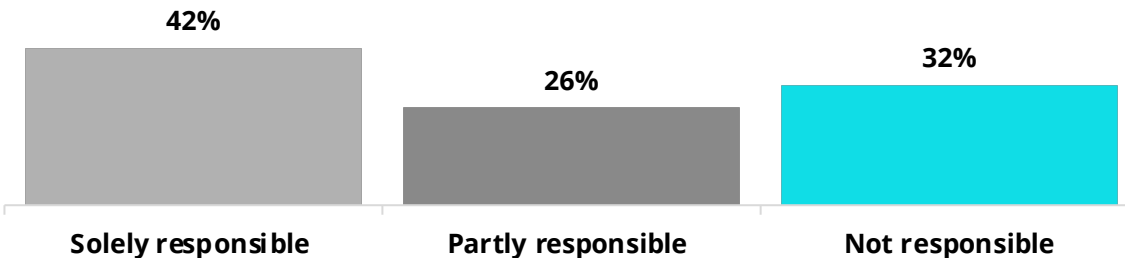
2024



## How grocery shopping is done



## Household purchases responsibilities

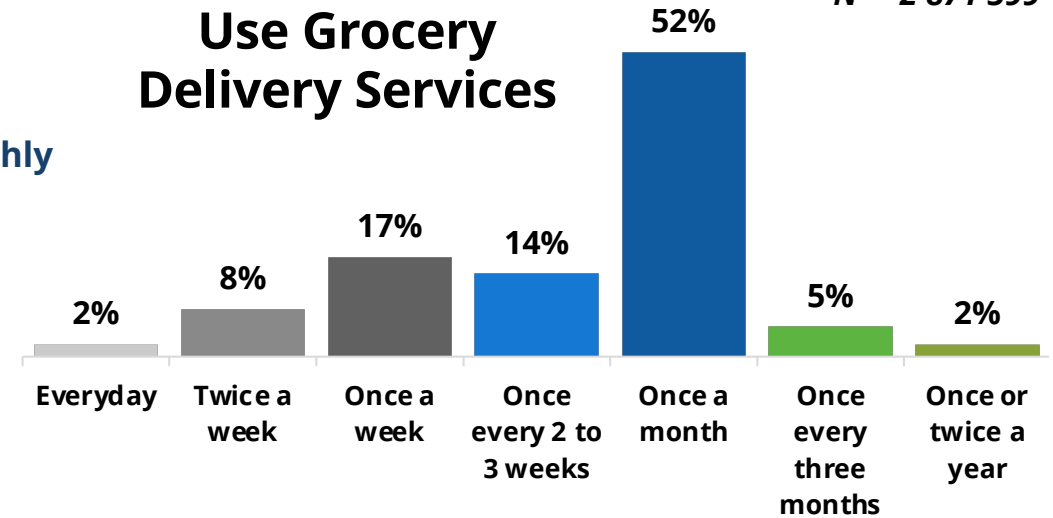


**R2 070**  
average monthly  
spend on  
groceries.

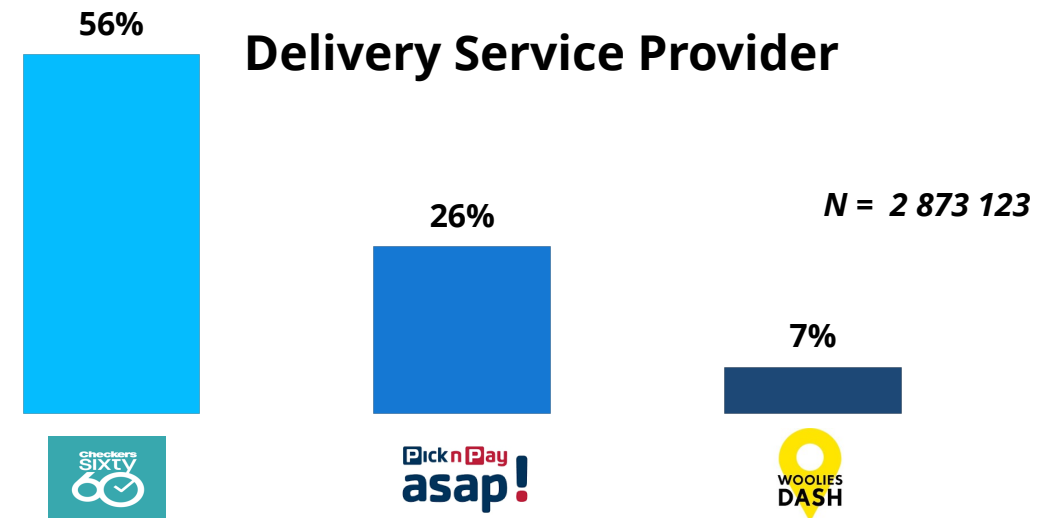


**57%** of  
the  
respondents  
usually do  
the grocery  
shopping  
themselves  
in their  
household.

## How Often Do You Use Grocery Delivery Services

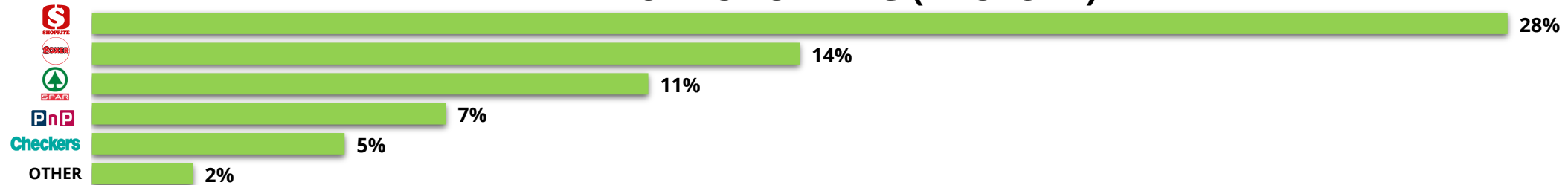


## Delivery Service Provider

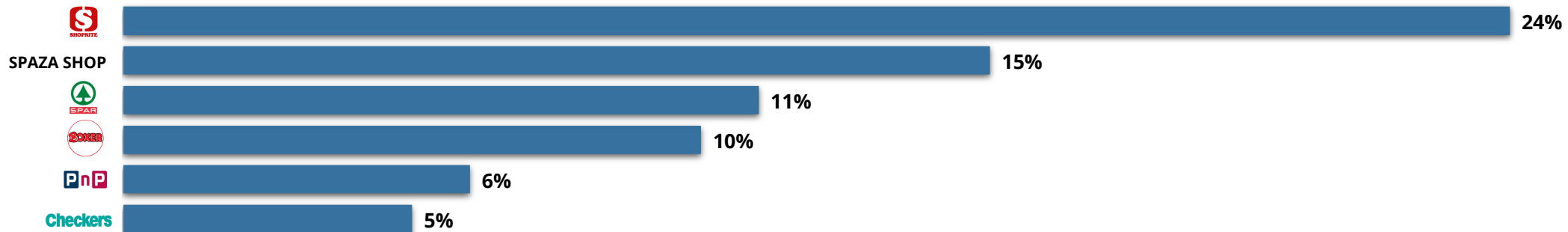




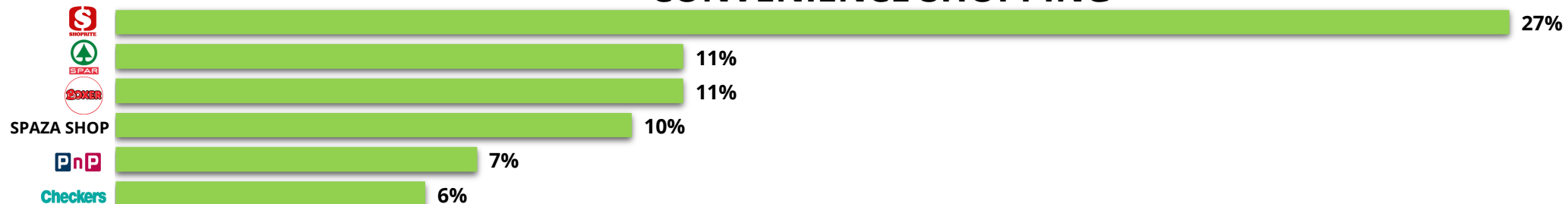
## BULK SHOPPING (IN STORE)



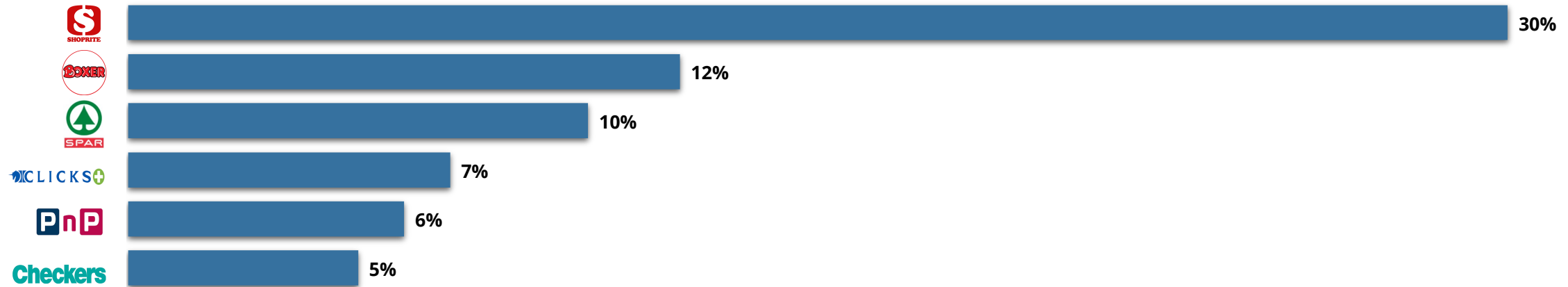
## DAY TO DAY (IN STORE) GROCERIES



## CONVENIENCE SHOPPING



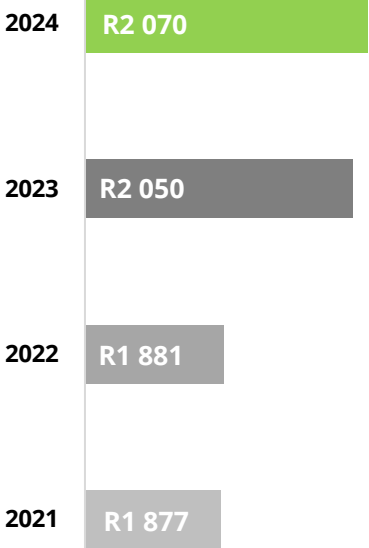
## TOILETRIES (IN STORE)



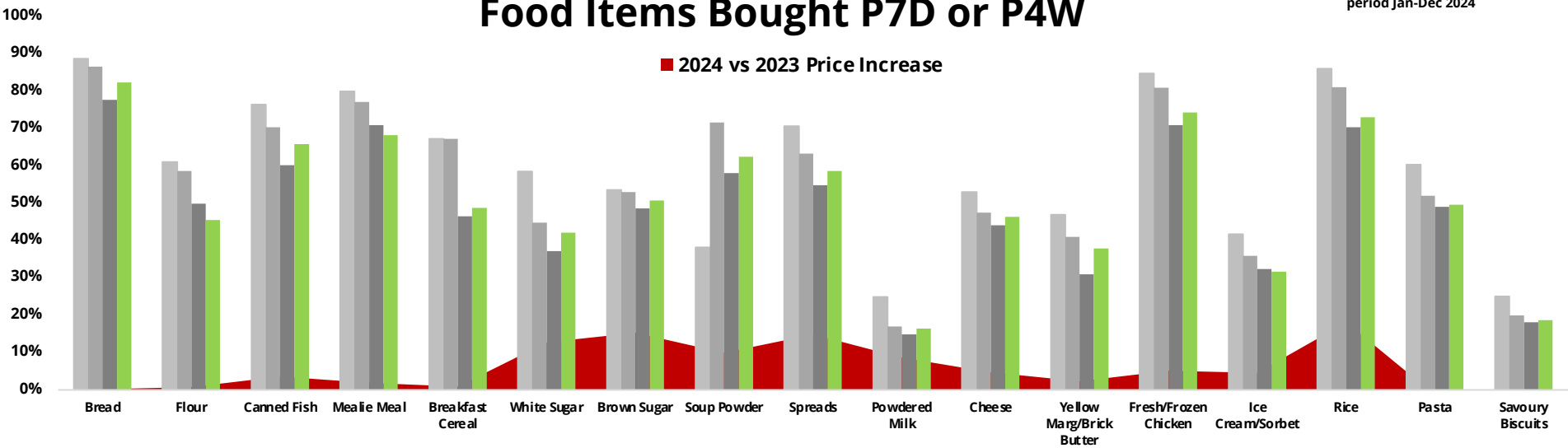
# GROCERIES AVERAGE SPEND / FOOD ITEMS BOUGHT

Price Increases sourced from  
STATS SA and averaged for the  
period Jan-Dec 2024

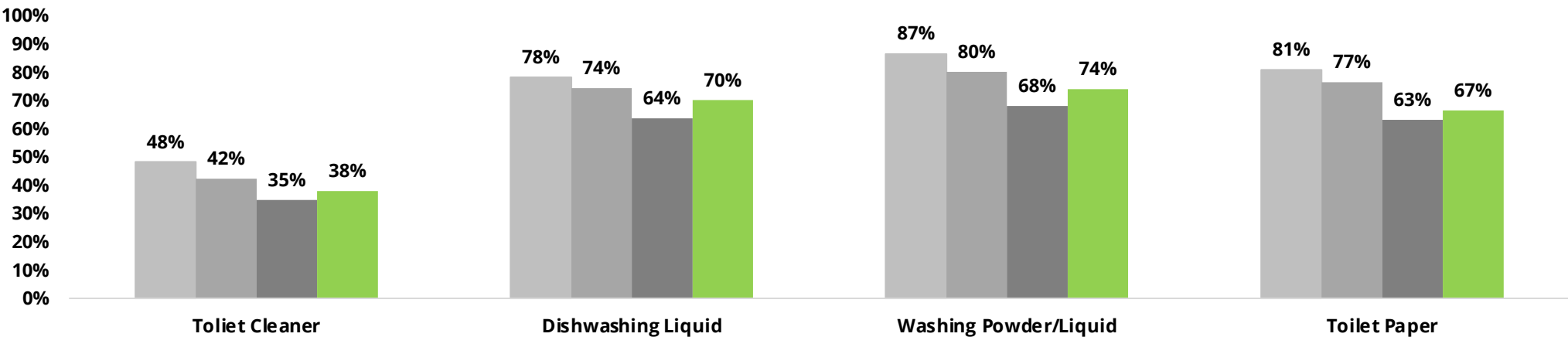
## Average Grocery **only** Spend



## Food Items Bought P7D or P4W

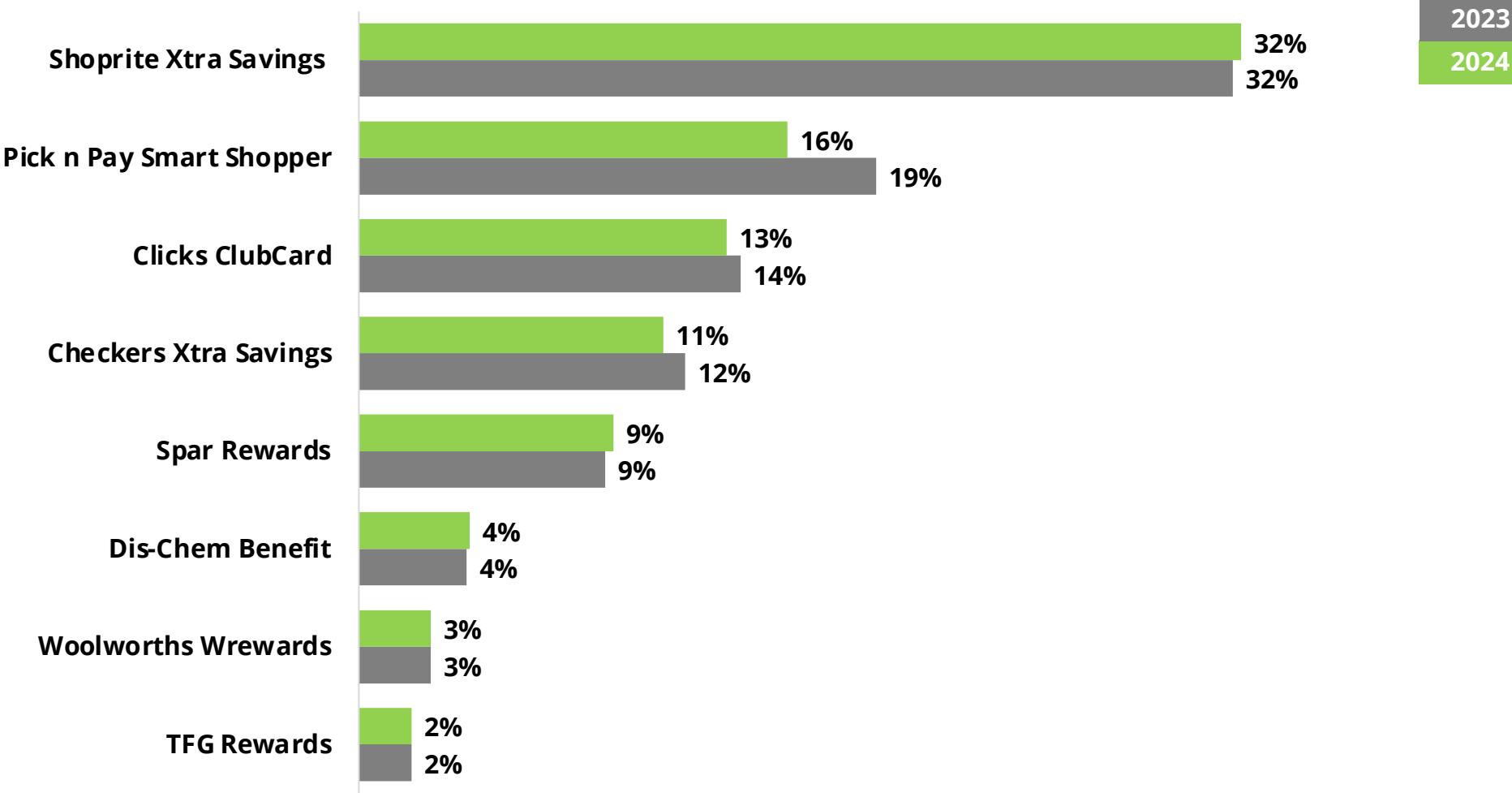


## Household Goods Bought P4W



48% of the population have a store loyalty or rewards card

Top 8 Loyalty/Rewards Cards



# LIQUOR CONSUMPTION



**R411** average  
monthly spend on  
alcoholic beverages

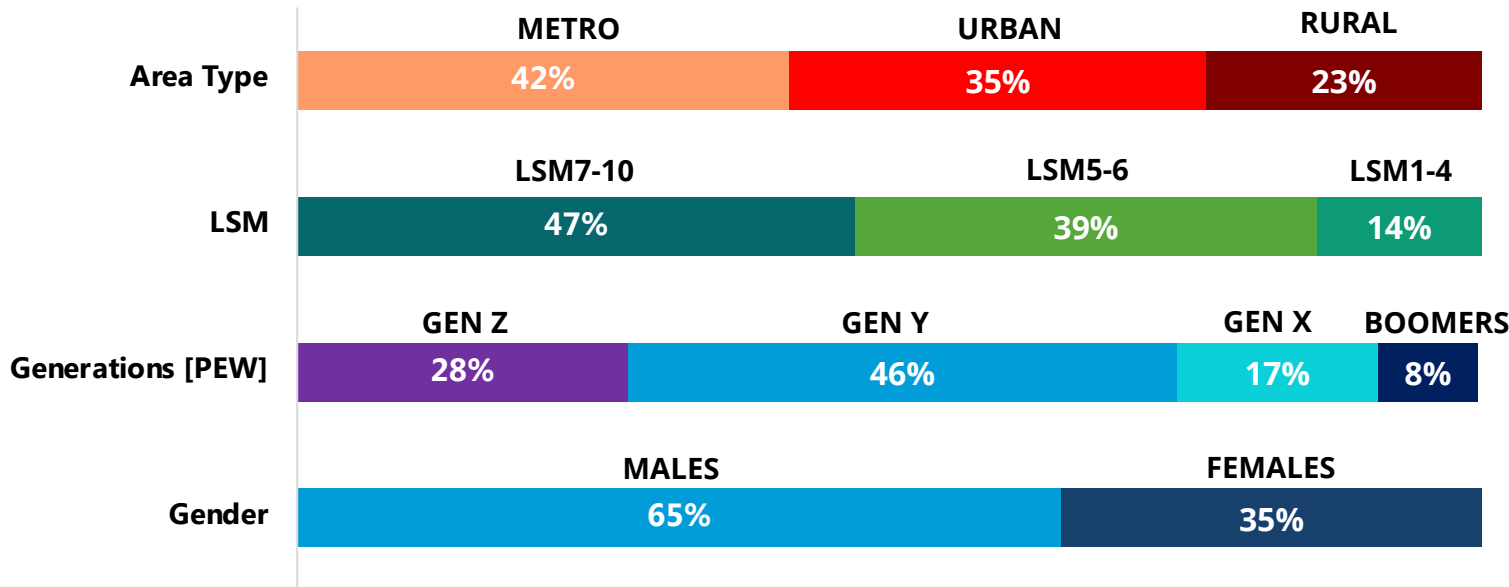


**23%** bought liquor  
in P7D

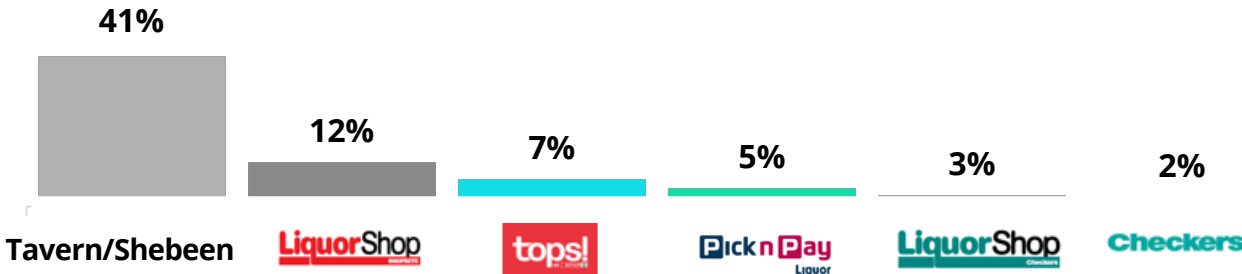


**13%** bought liquor  
in P7D from a  
tavern/shebeen

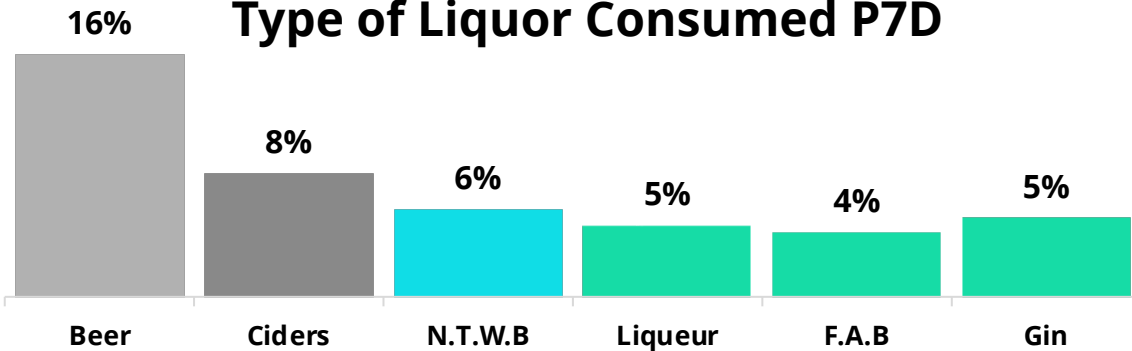
## Bought Alcohol P7D Population Distribution



## Top Liquor Outlets P7D



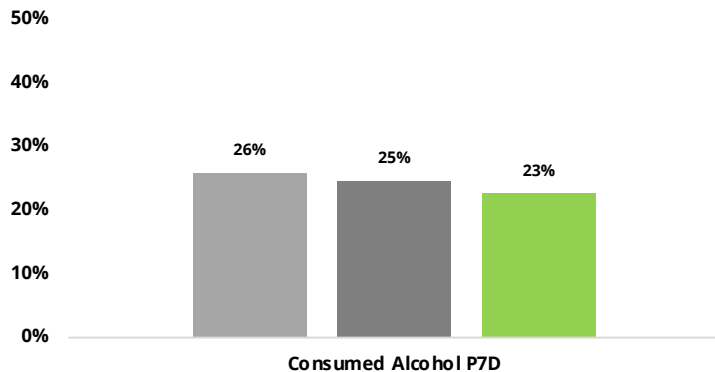
## Type of Liquor Consumed P7D



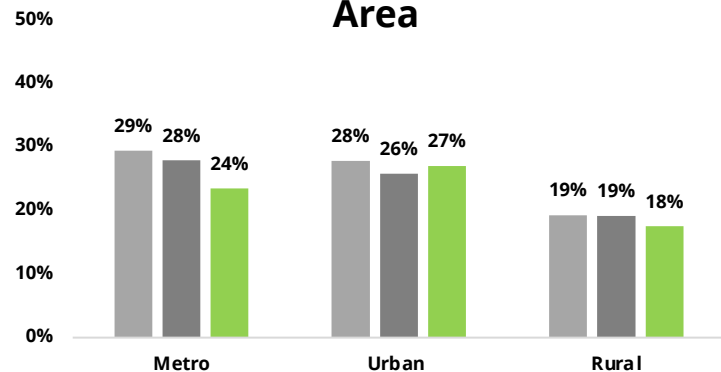


# ALCOHOL CONSUMPTION PAST 7 DAYS

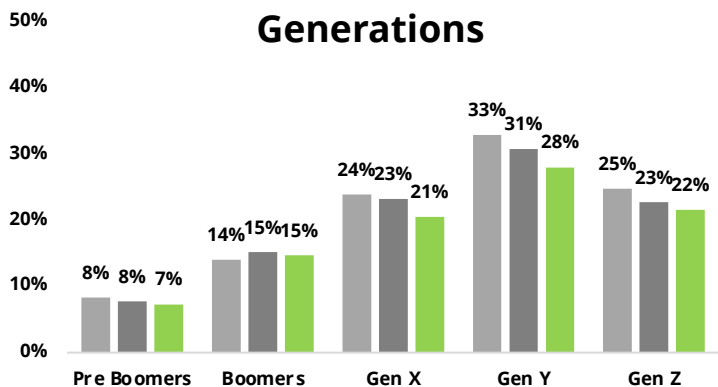
## Consumed Alcohol P7D



## Consumed Alcohol P7D Area



## Consumed Alcohol P7D Generations

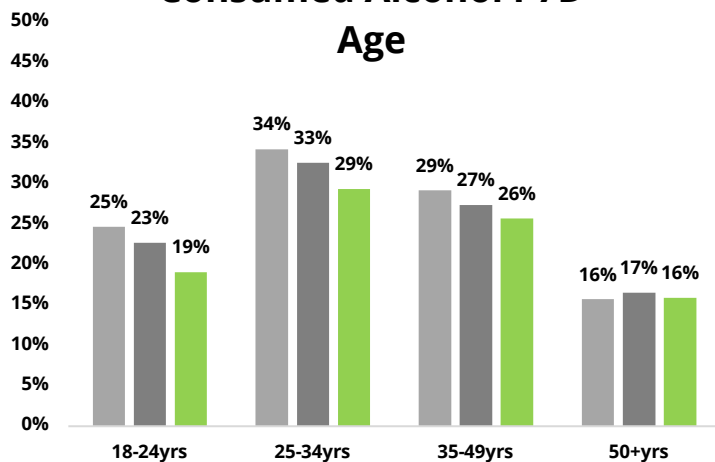


2022

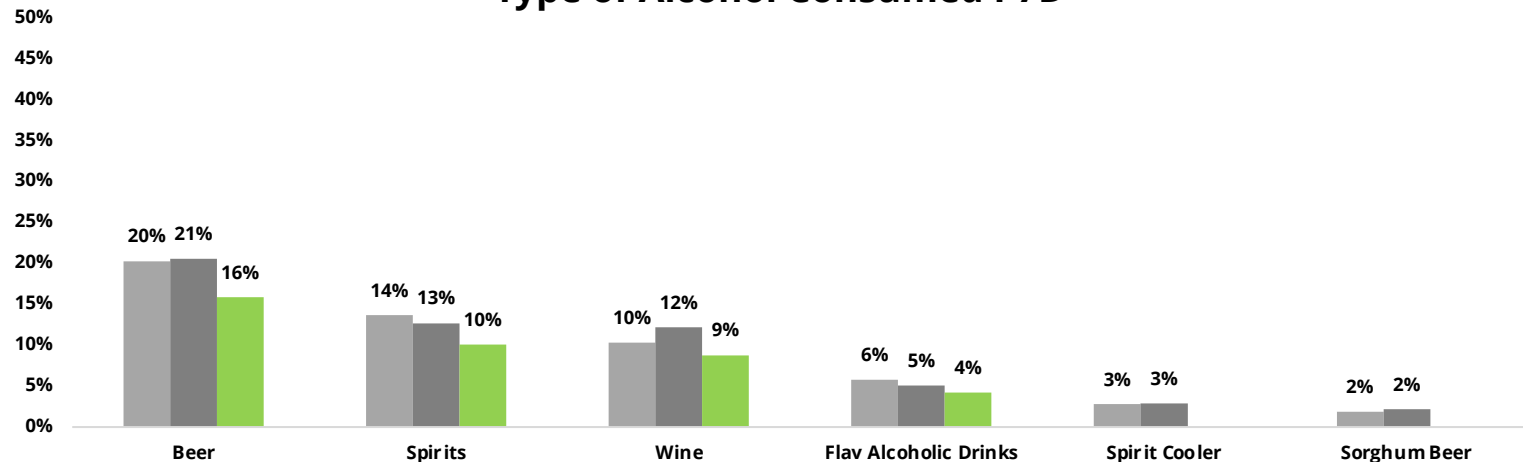
2023

2024

## Consumed Alcohol P7D Age



## Type of Alcohol Consumed P7D



# MOTOR VEHICLES



**R2081** average  
monthly spend on  
fuel



**45%** have a  
tracking device



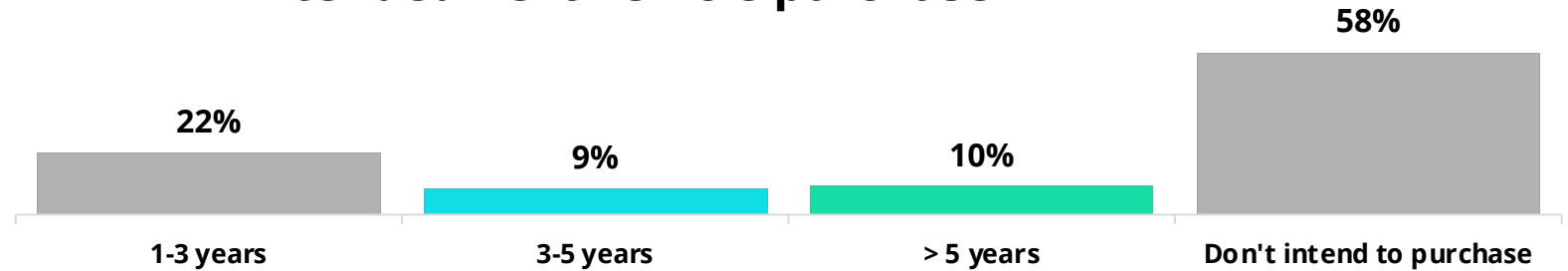
**R5511** average  
instalment price



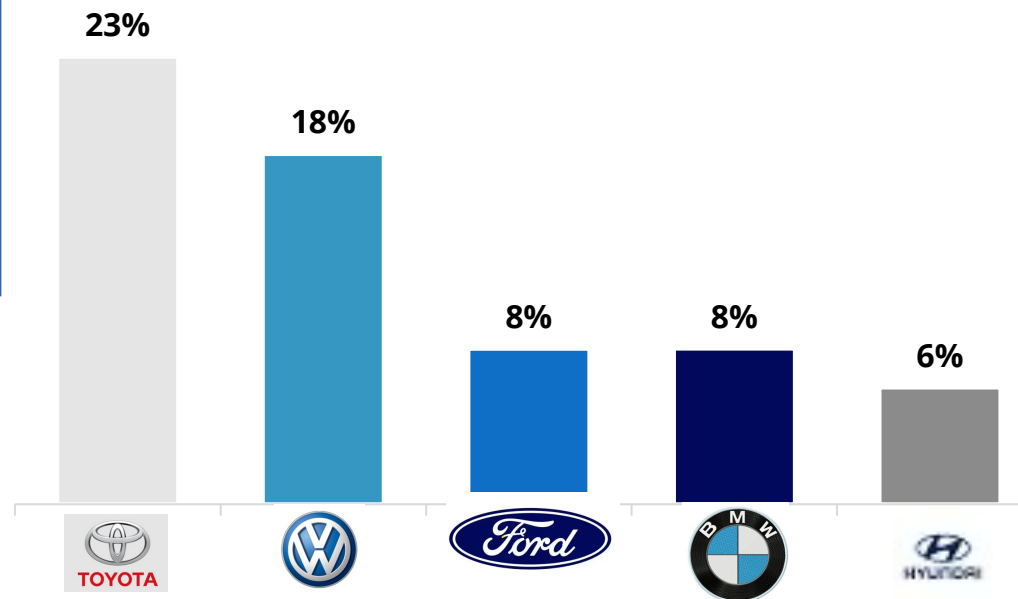
**59%** people  
purchased second-  
hand vehicle

**38%**  
of drivers personally own a  
vehicle

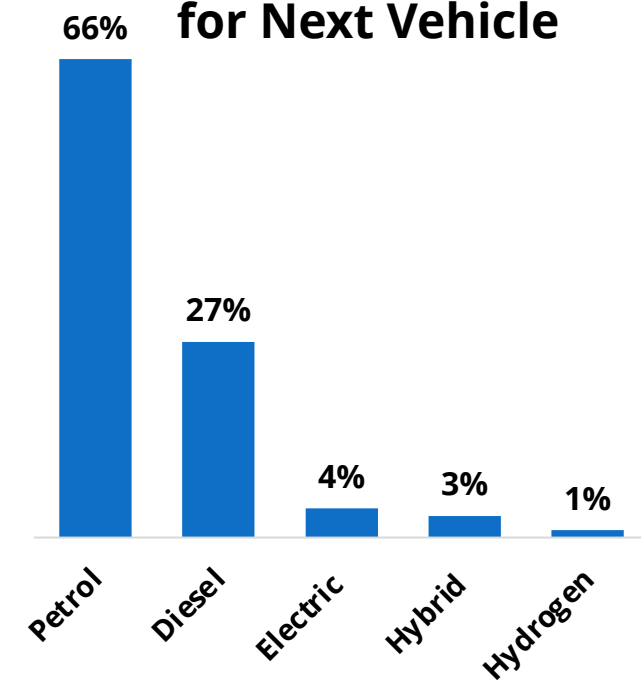
## Intended next vehicle purchase



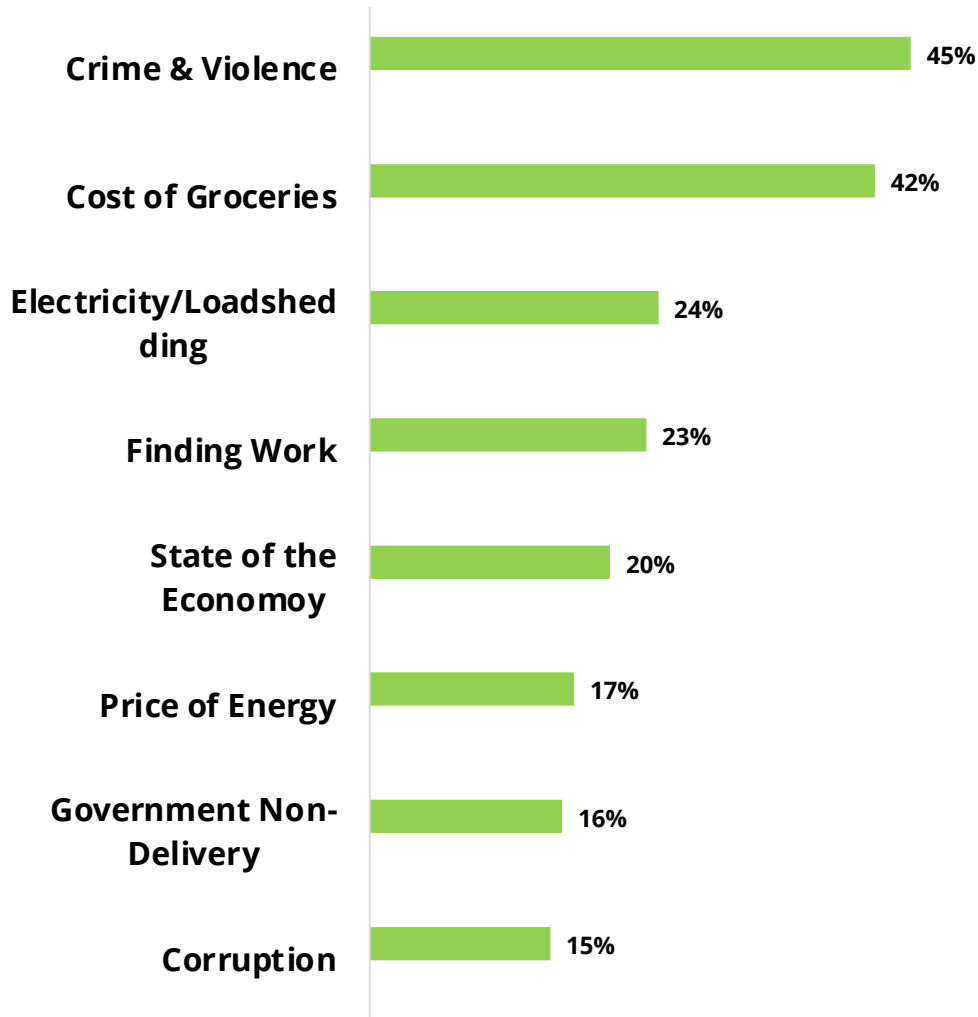
## Most Common Vehicle Brands Driven



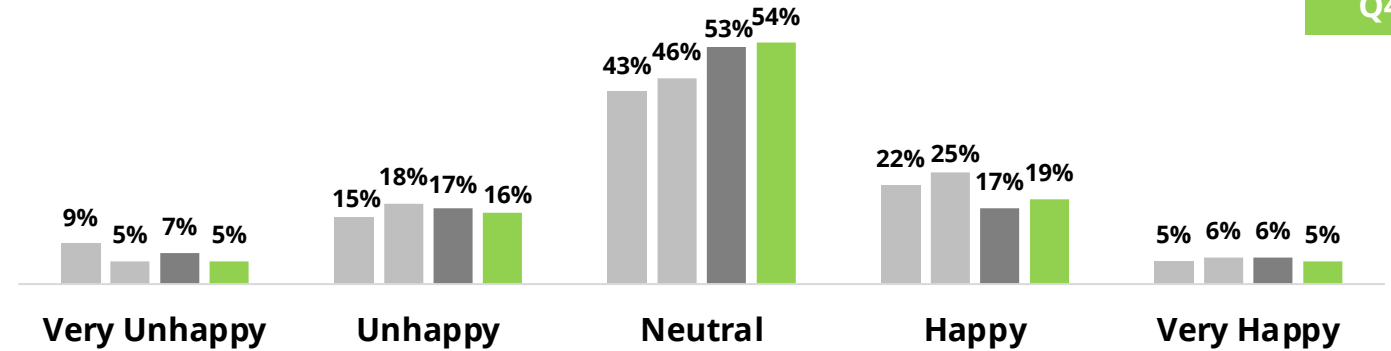
## Preferred Fuel Type for Next Vehicle



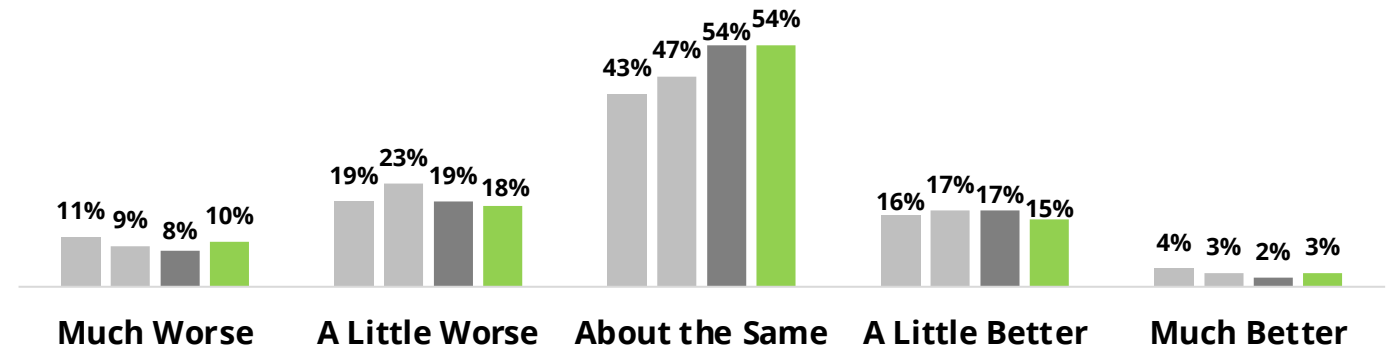
## Current Worries



## How Happy with Life and Current Circumstances



## Personal Finances Versus a Year Ago



# Thank you.



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**PLUS 94**  
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[Plus94 Research](http://www.plus94.co.za)

<https://www.plus94.co.za/>



**Rands:** A coin and monetary unit of the Republic of South Africa, equal to 100 cents

**LSM:** Living Standards Measure (LSM) marketing tool used in South Africa. It is a means of segmenting the South African market that cuts across race, gender, age, or any other variable used to categorise people. Instead, it groups people according to their living standards.

**Shebeens:** Informal alcohol outlets commonly known as shebeens operate in South Africa's townships. The first shebeens in South Africa were local bars and taverns where mostly working-class urban males could unwind, socialise, and escape the oppression of life during the apartheid era. The shebeens were also illegal. Today, they form a vibrant part of the community, and continue to define the social life of many South Africans.

**Taverns:** A place of business where alcoholic beverages are sold to be consumed on the premises. Like a pub or bar.

**Stokvel:** The term stokvel is unique to the South African context. Stokvels are essentially voluntary associations in which members make regular contributions to a pool of funds, to be used as capital for investments, collective activities like parties, and even emergency instances where unexpected costs arise. This could be on a weekly, fortnightly, or monthly basis.

**Loadshedding:** A controlled process that responds to unplanned events in order to protect the electricity power system from a total blackout. While Eskom generally use the word blackout loosely to mean “no lights” in our local area, a country-wide blackout has much more serious consequences. Blackouts occur when there is too much electricity demand and too little supply, bringing the power system into an imbalance and consequently tripping the power system in its entirety.

**Provinces:** South Africa has nine provinces, which vary considerably in size. The smallest is tiny and crowded Gauteng, a highly urbanised region, and the largest the vast, arid, and empty Northern Cape, which takes up almost a third of South Africa's total land area. Each province has its own Legislature, Premier and Executive Council. The country has common boundaries with Namibia, Botswana and Zimbabwe, while Mozambique and Eswatini lie to the north-east.

**EA:** The country has been divided into areas called enumeration areas (EA). It is important to know and identify the boundaries of these areas as well as the number of dwellings per enumeration area before the enumerators are sent to the area.

## DATA COLLECTION INSTRUMENTS

- Face-to-face questionnaires consisting of 414 questions and covering 2 155 non-fast moving consumer goods brands,
- Leave-behind diaries
  - Total Questions = 411
  - Behaviour questions = 136
  - Non FMCG Brands = 380
  - FMCG Questions = 344
  - FMCG Categories = 153
  - FMCG Brands = 2 655

## ANNUAL RESEARCH SAMPLE

- Total Annual **20 004**
- Cycle (Quarterly) **5 001**
- Dip (Monthly) **1 667**



## INTERVIEW DETAILS

- Face-to-face Interview duration: 45-60 min
- Diary Completion time: 3 and 5 days allocated before collection

## RESEARCH UNIVERSE

- Ages 15+
- Male & Female
- All races
- All provinces

# DATA PREPARATION AND RELEASE FORM



## Back Checking

### RECORDING

- All interviews are recorded
- 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

- 2% of sample
- 2% per interviewer
- Confirm demographic variables
- Confirm Kish Grid compliance
- Ops Execs conduct back checks on Physical Back Checks
- Assessed on a weekly basis

## GIS Auditing

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.

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:

## LEVEL 01

Consistency assessment of the three captured GPS points.

## LEVEL 02

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

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