



MARKETING RESEARCH
FOUNDATION

MAPS WEBINAR: July '20 – June '25

PLUS 94
RESEARCH

NOVEMBER 2025

5-YEAR JOURNEY



5-YEAR JOURNEY



271

Interviewers in field

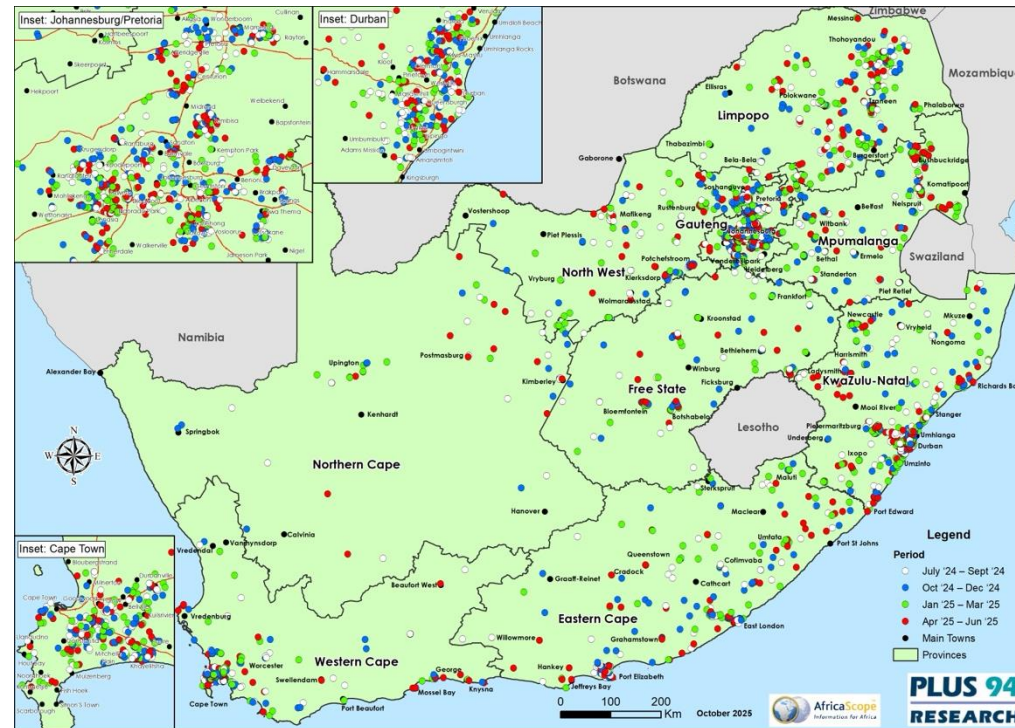
20 000

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 | 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 |

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

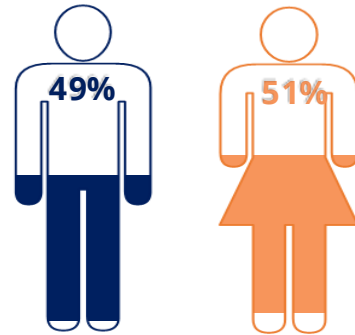
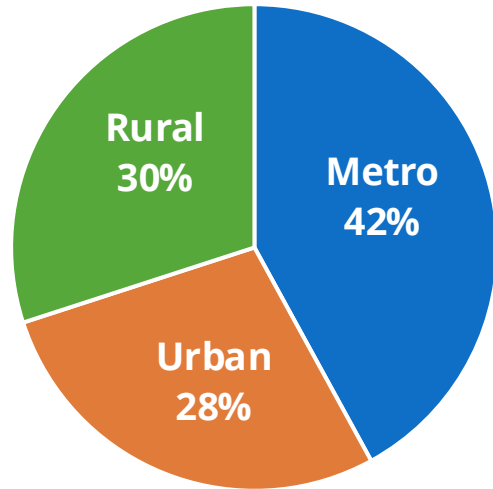
Demographics



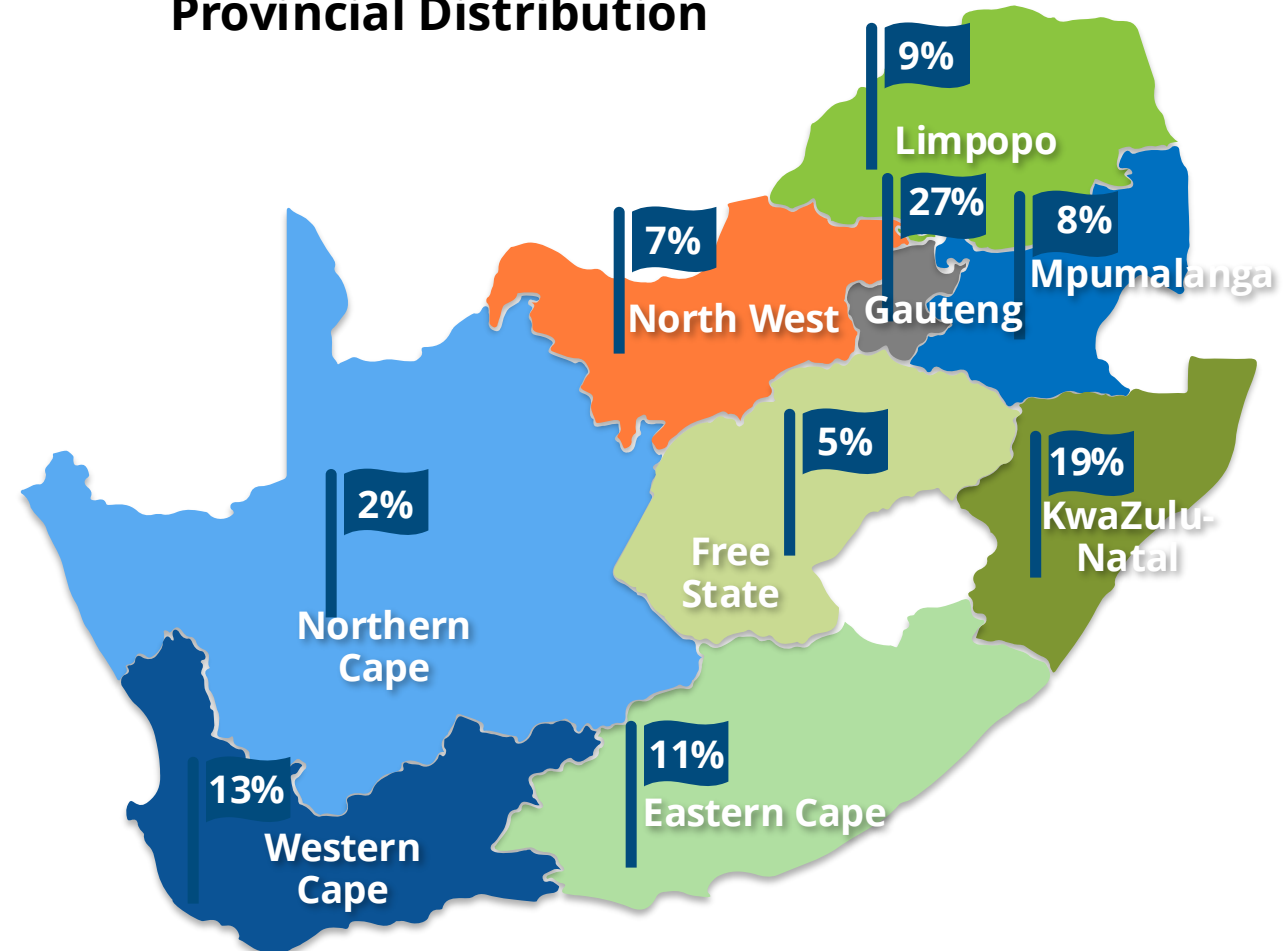
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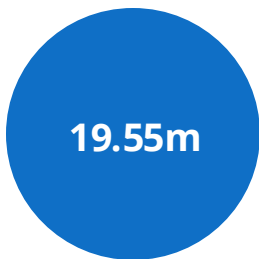
Area Distribution



Provincial Distribution



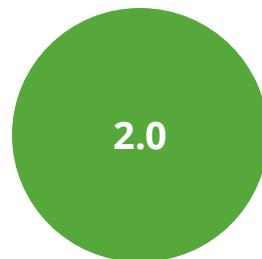
Households



People per household



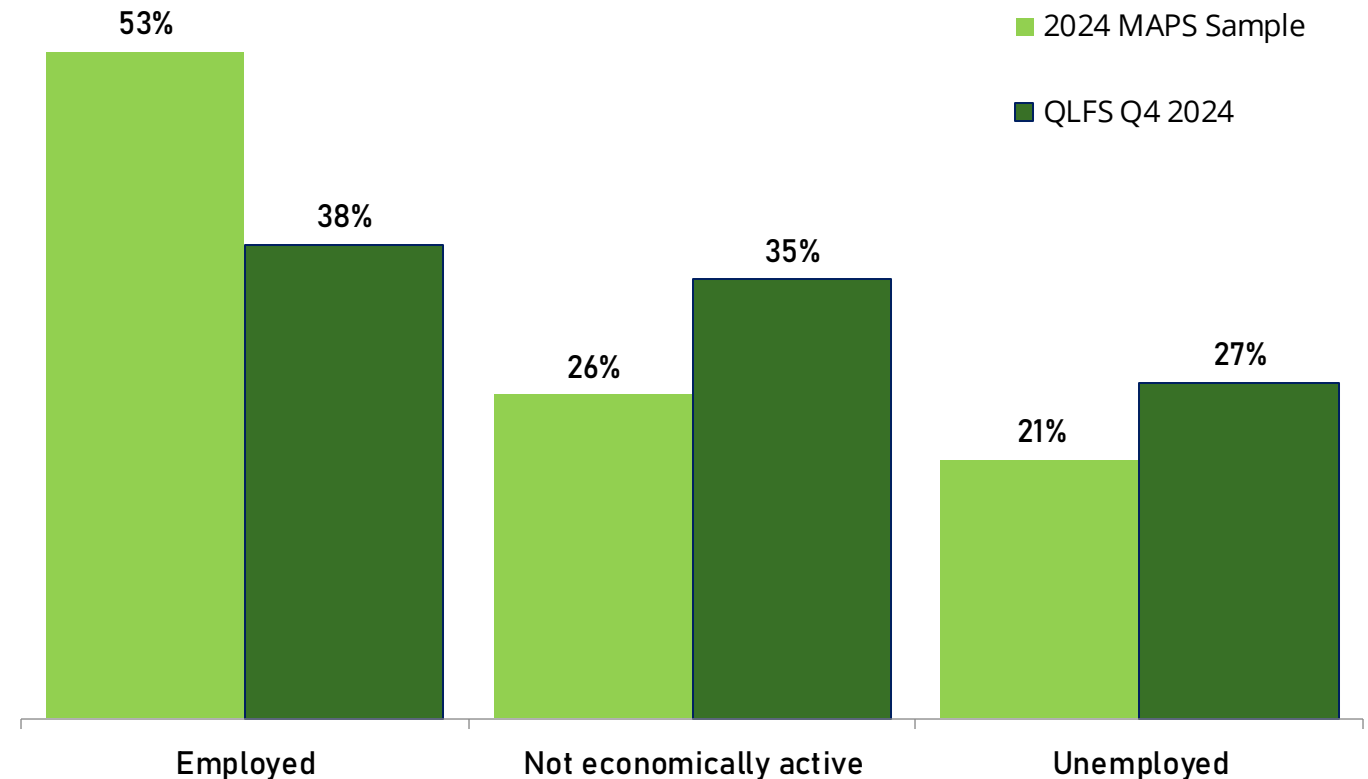
Dependants per household



Population Distribution

	2023 to 2024	2025	% Shift
Metro	17 547 284	19 170 399	9%
Urban	12 754 203	12 636 294	-1%
Rural	13 290 735	13 880 274	4%
Female	22 580 134	23 242 788	3%
Male	21 012 089	22 444 179	7%
Black African	34 430 941	36 611 985	6%
White	3 996 946	3 710 374	-7%
Indian/Asian	1 094 607	1 382 271	26%
Coloured	4 069 728	3 982 337	-2%
Total Pop 15+	43 592 222	45 686 967	5%
Total no. Households	18.477m	19.551m	3%

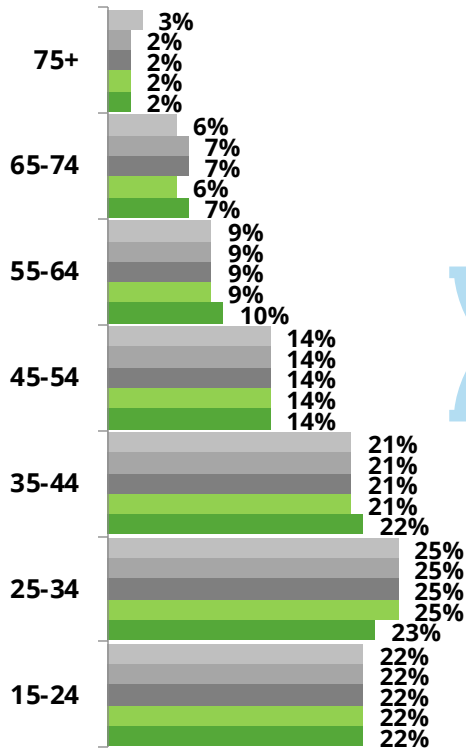
Employment Landscape



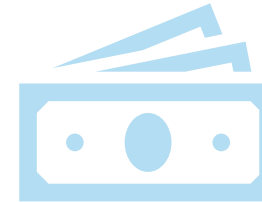
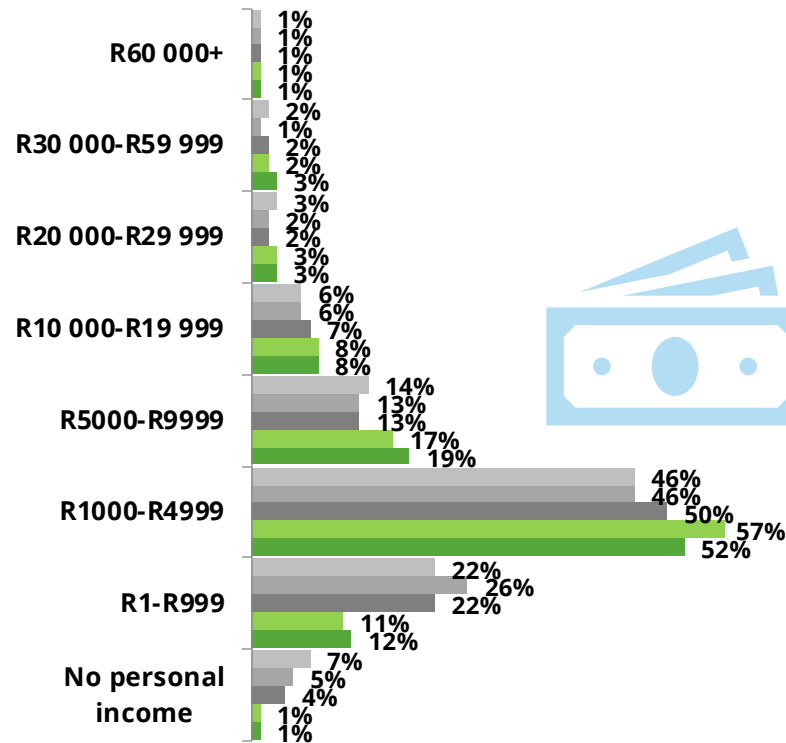
**Source: Q4 QLFS 2024 Expanded Definition*

DEMOGRAPHICS: YoY SHIFTS

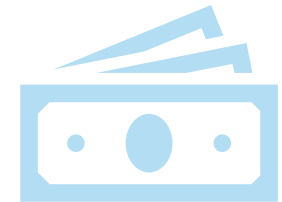
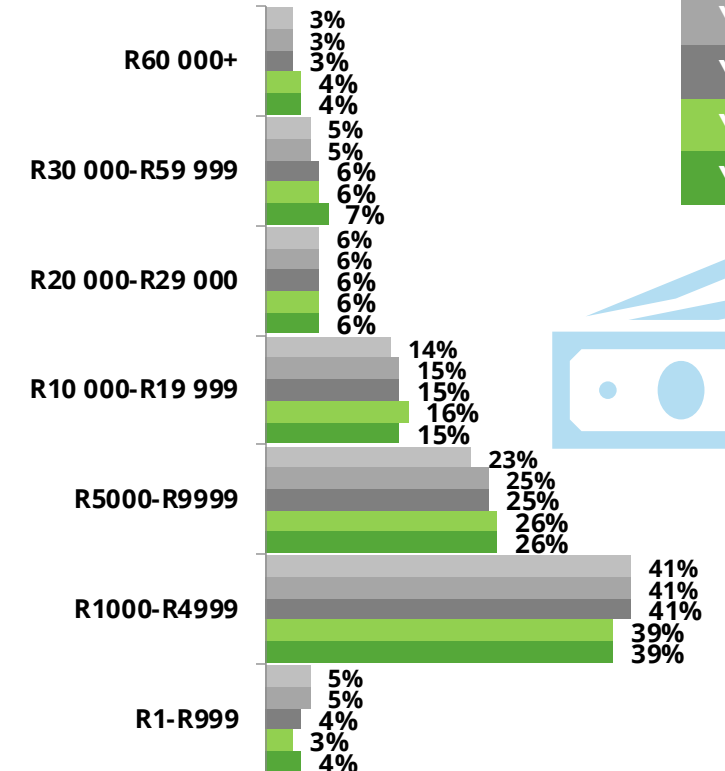
Age Groups



Personal Income



Household Income



Year 1
Year 2
Year 3
Year 4
Year 5

Average age: 38
Average age: 38
Average age: 38
Average age: 38
Average age: 39

Average Income: R4 814
Average Income: R4 609
Average Income: R4 813
Average Income: R6 224
Average Income: R7 383

Average Income: R11 105
Average Income: R11 804
Average Income: R12 721
Average Income: R13 006
Average Income: R14 093

POPULATION: % YoY

Year 1
Year 2
Year 3
Year 4
Year 5

Gender



Year 1 - 4

Year 5

52%



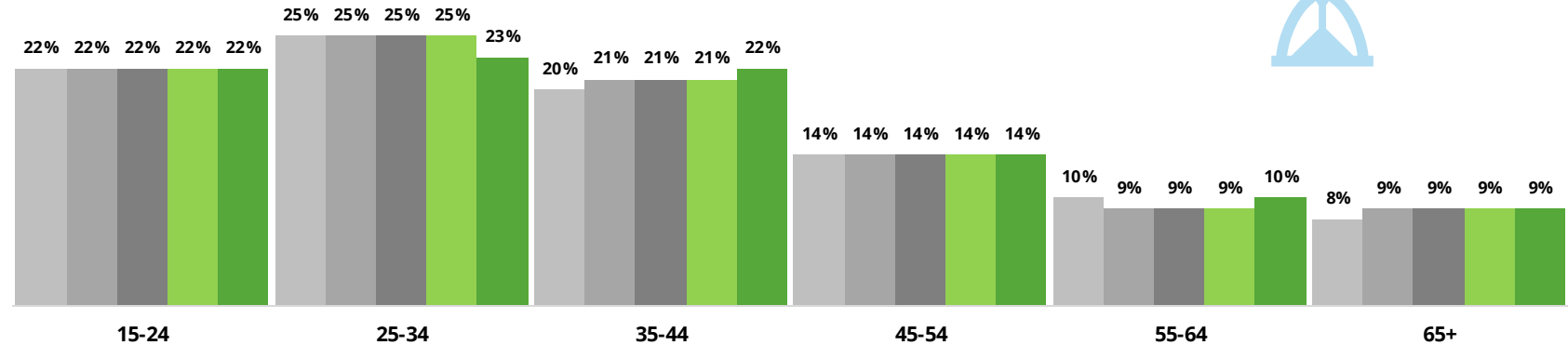
51%

48%

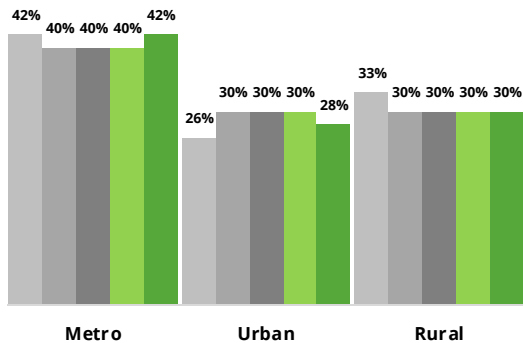


49%

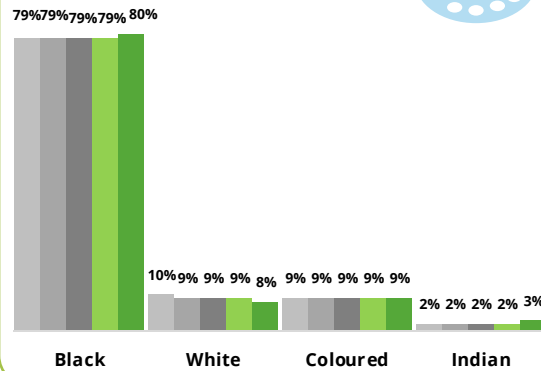
Age Groups



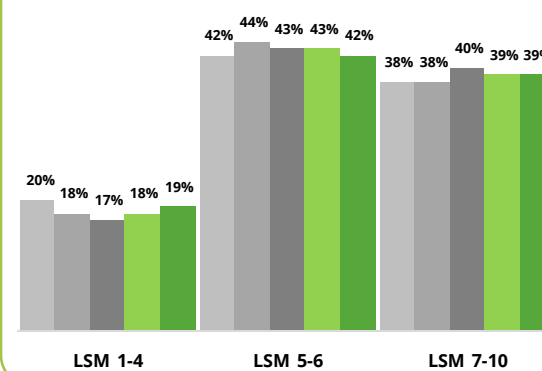
Area



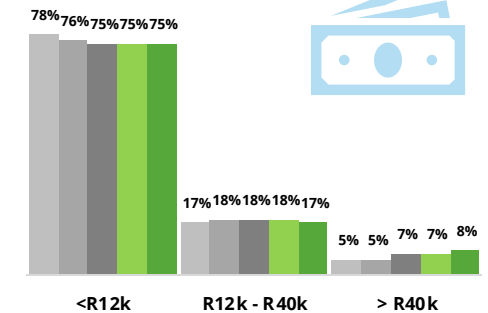
Race



LSM



Monthly Household Income



Economic Landscape

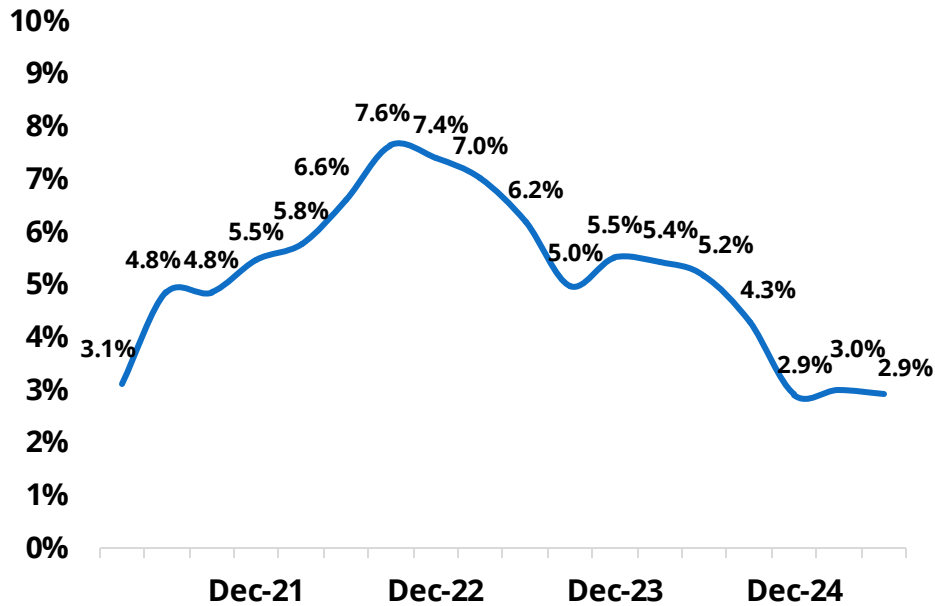


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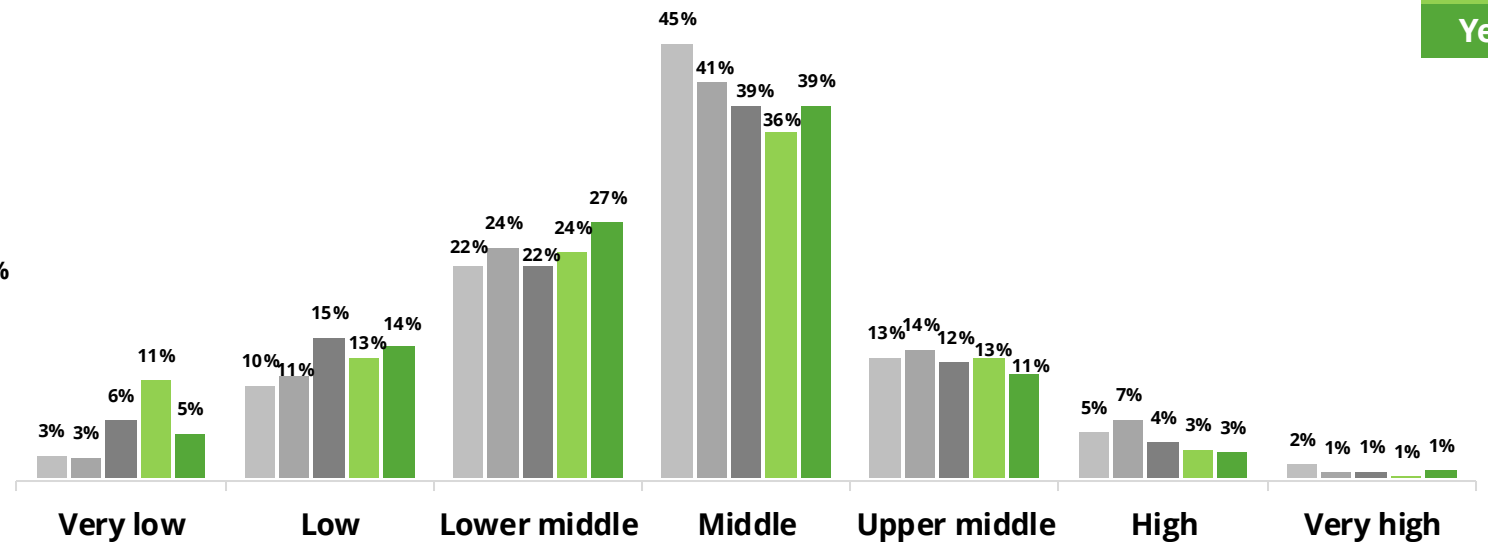
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South African Inflation Rate



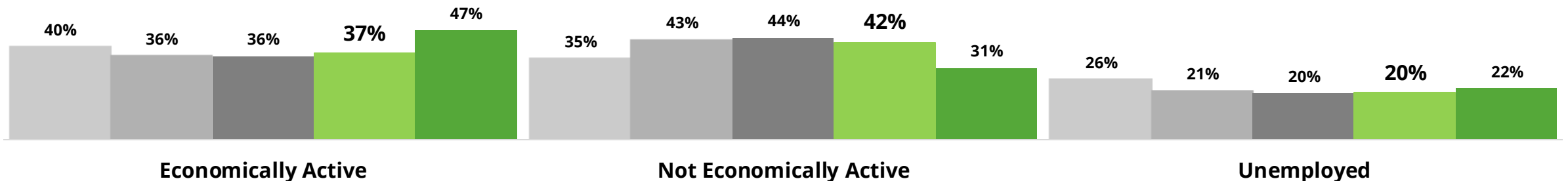
Which socio-economic class or group would you associate yourself with?



- Year 1
- Year 2
- Year 3
- Year 4
- Year 5

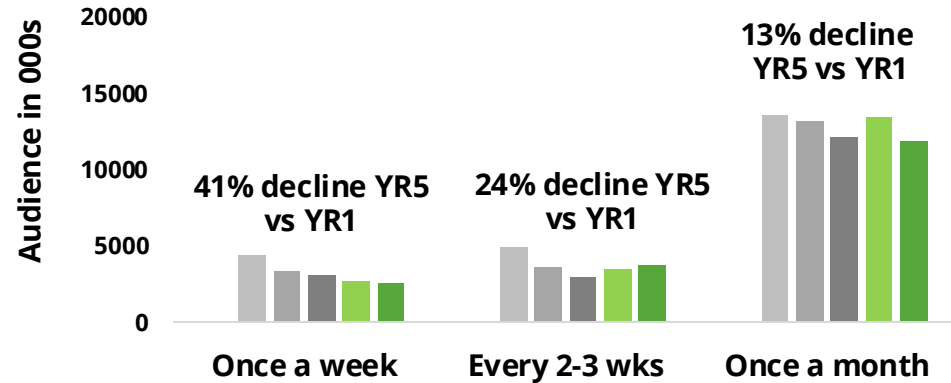


Working Status

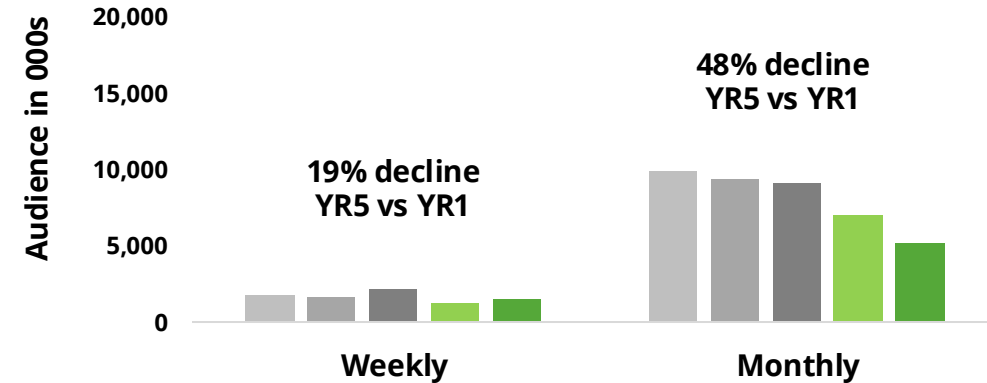


Year 1
Year 2
Year 3
Year 4
Year 5

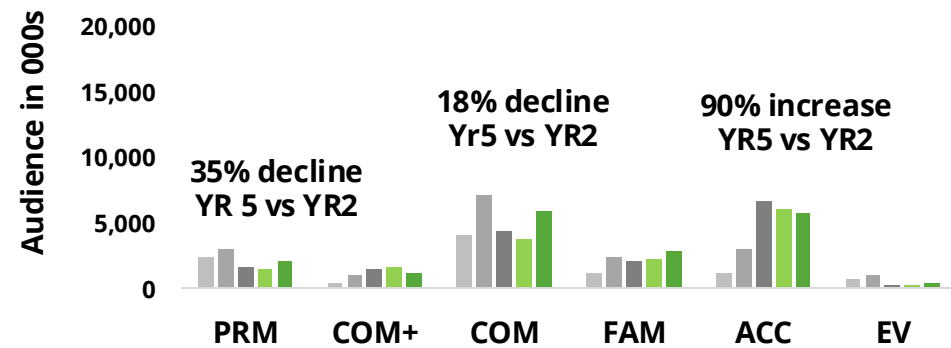
Fast Food – Frequency



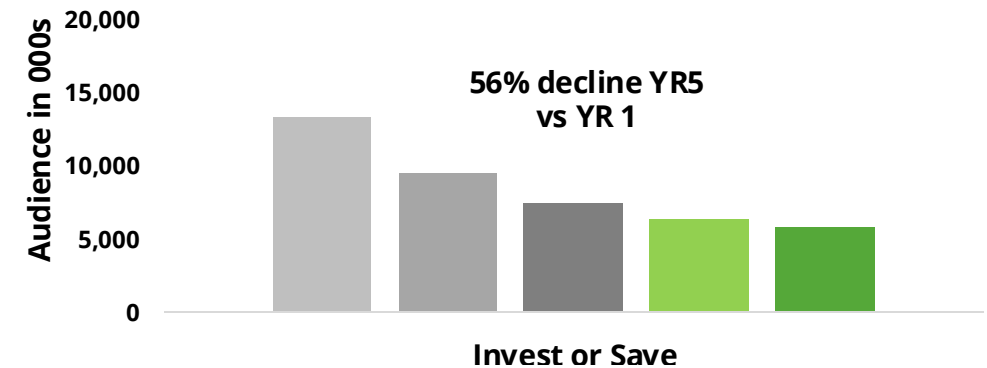
Eat Out - Frequency



DStv Subscription Base

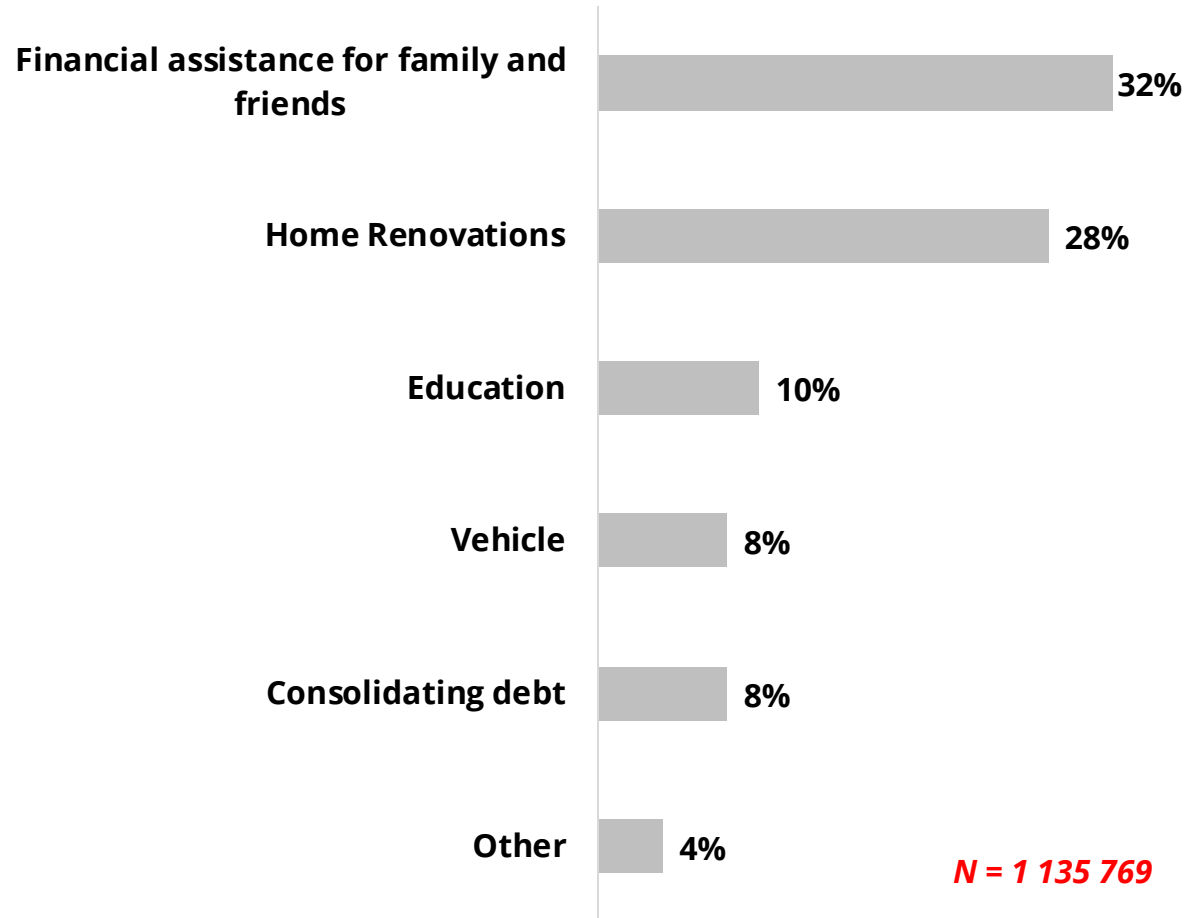


Save or Invest

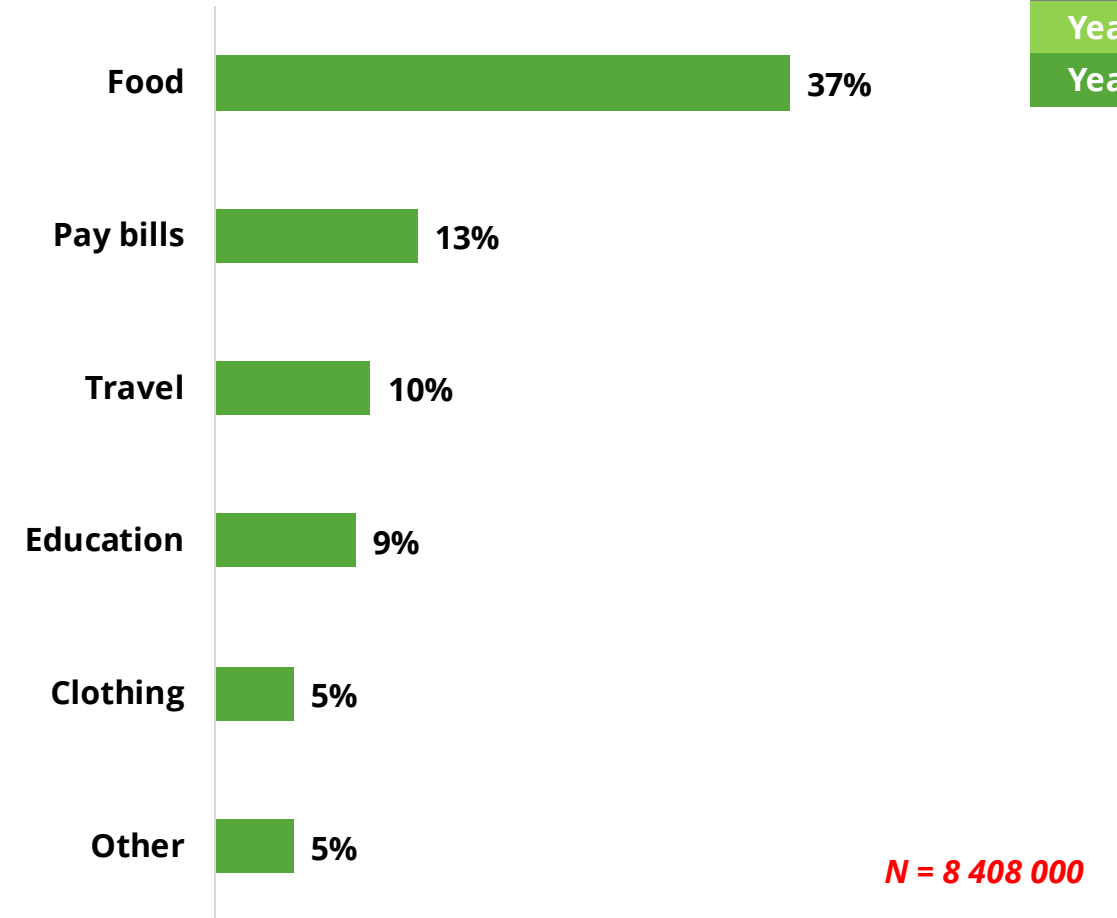


LOANS - TOP REASONS FOR LOANS TAKEN

Q3 '20 - Q2 '21

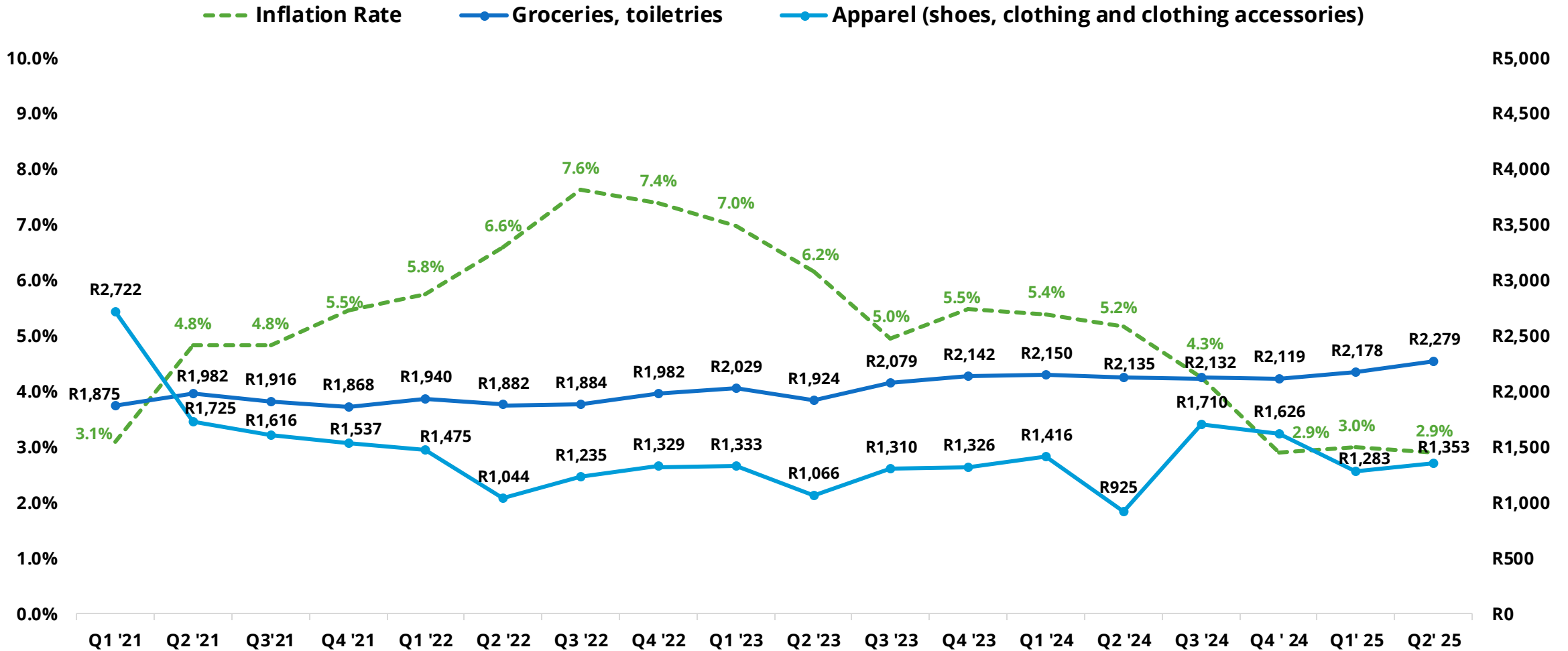


Q3 '24 - Q2 '25



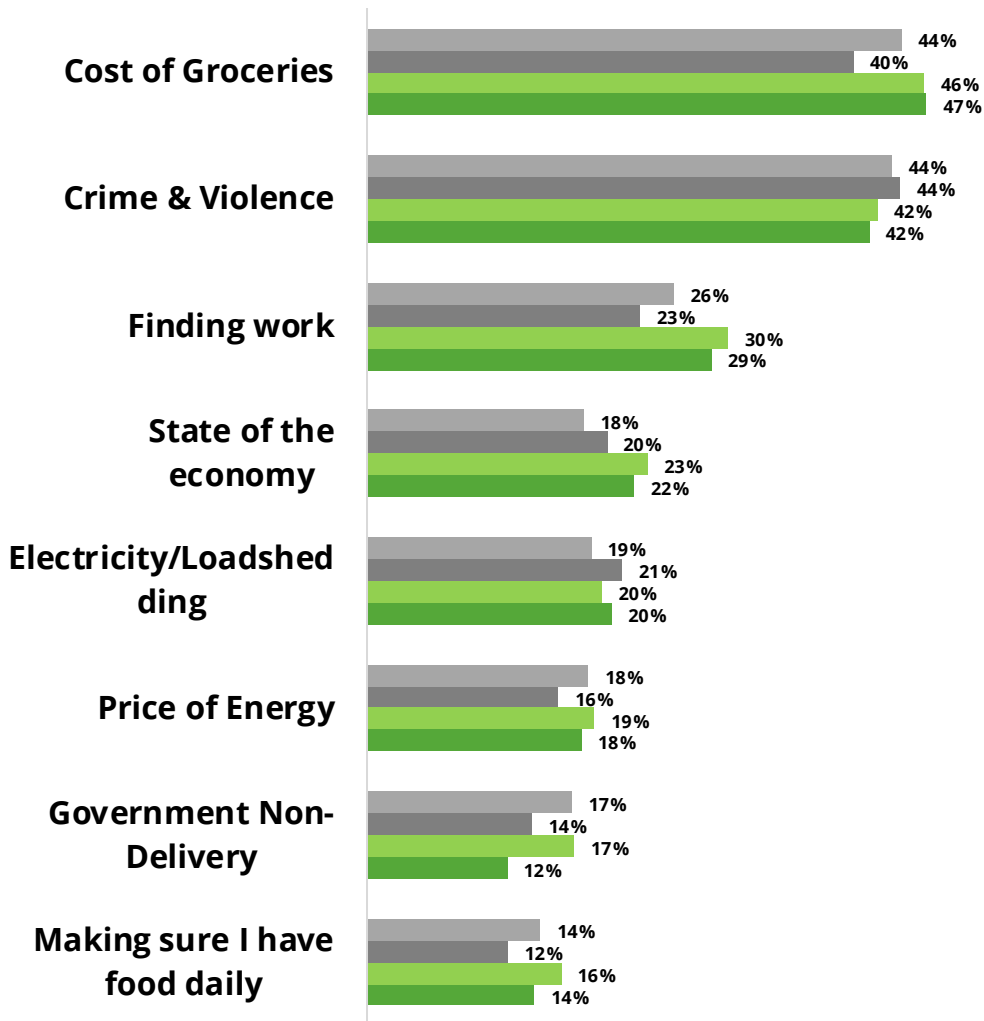
- Year 1
- Year 2
- Year 3
- Year 4
- Year 5

AVERAGE MONTHLY SPEND: GROCERIES + TOILETRIES & APPAREL: QoQ

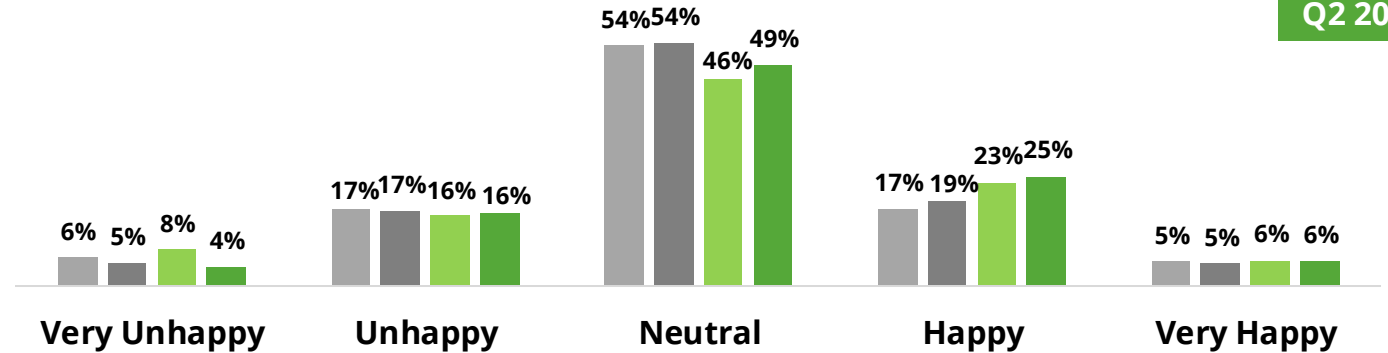


*CPI Inflation rate figures provided by StatsSA (2025)

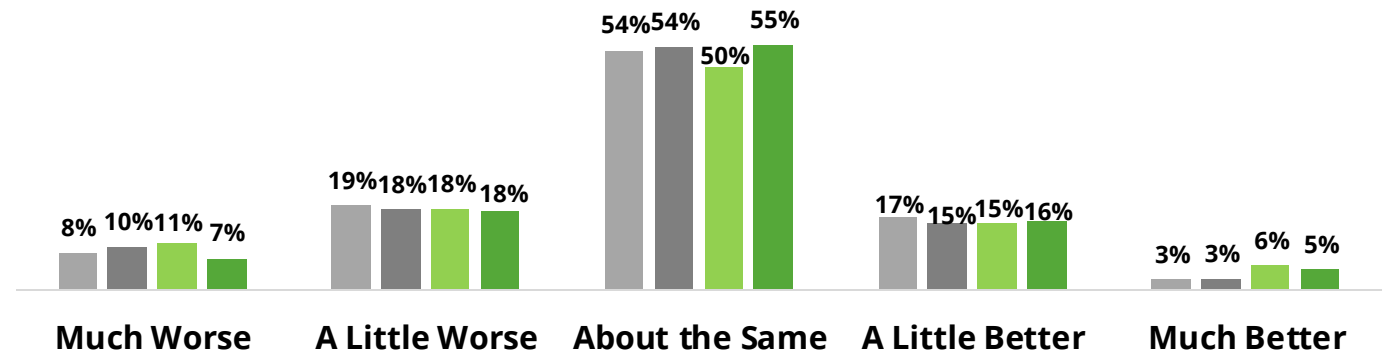
Current Worries



How Happy with Life and Current Circumstances



Personal Finances Versus a Year Ago



Media Landscape



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21% of people spend **more than 20 hours** per week watching TV.

TOP 4 TV Channels Viewership

SABC 1 **39%** Watched P7D

e **28%** Watched P7D

SABC 2 **20%** Watched P7D

SABC 3 **13%** Watched P7D

Watched TV*P7D

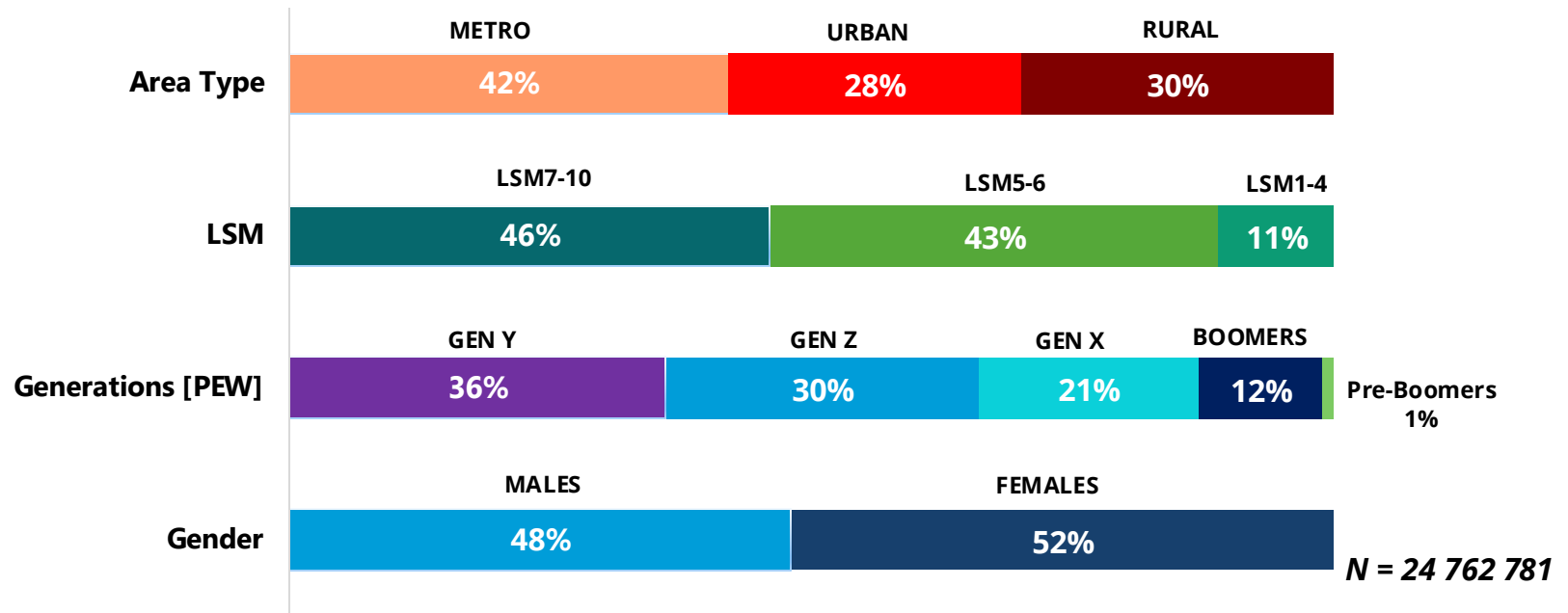


Q1'21 Q2'21 Q3'21 Q4'21 Q1'22 Q2'22 Q3'22 Q4'22 Q1'23 Q2'23 Q3'23 Q4'23 Q1'24 Q2'24 Q3'24 Q4'24 Q1'25 Q2'25

Year 5
TV Penetration (P7D)
54% Average

Year 5
DStv Penetration (P7D)
34% Average

DStv Exclusive Channels



19% of people have access to on-demand streaming services.

Top 3 Streaming services

NETFLIX

Access to Netflix
77%

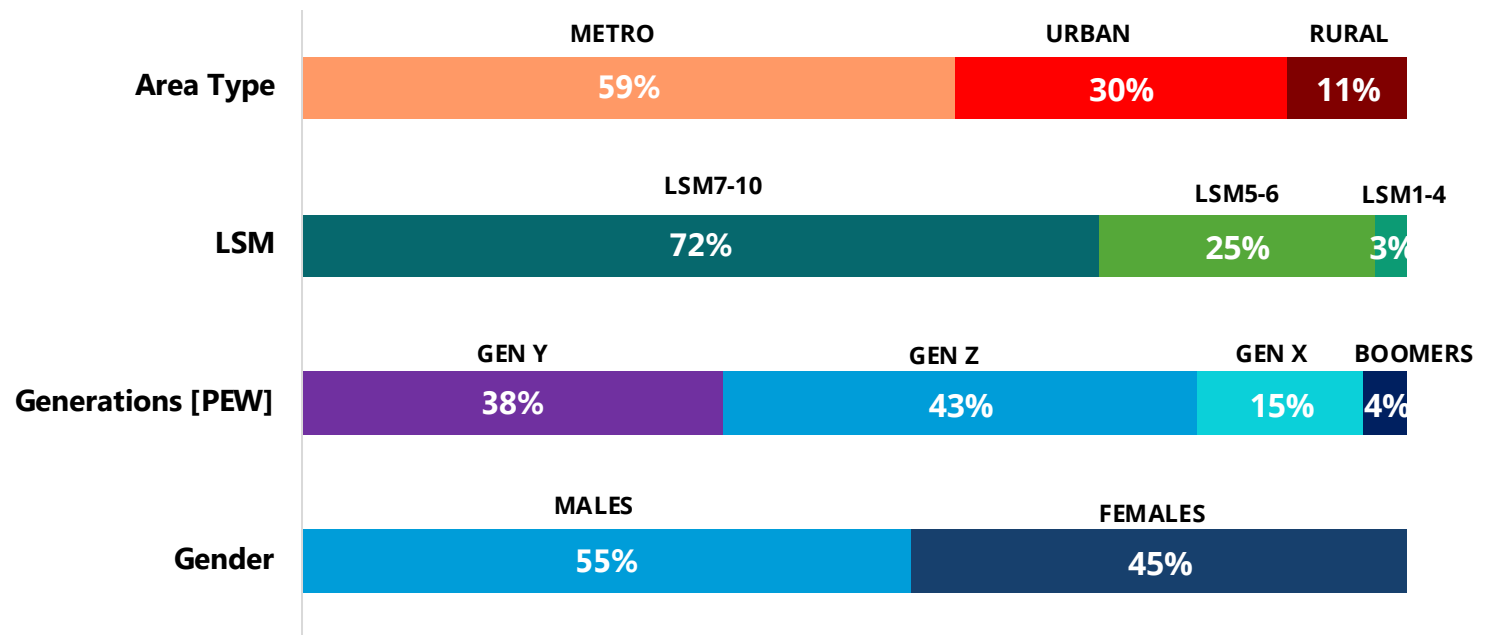
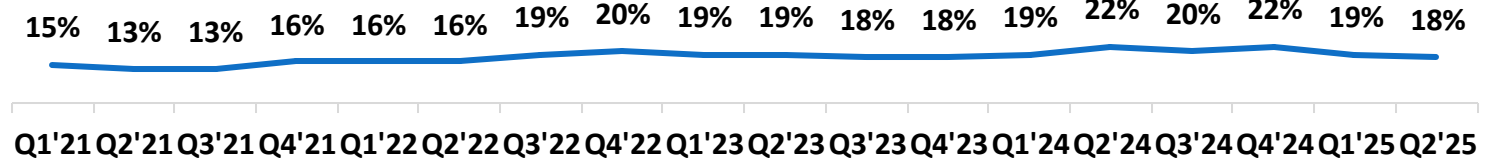


Access to Showmax
39%



Access to YouTube (PAID)
15%

On-demand streaming



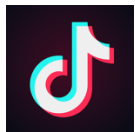
N = 8 793 334

VIDEO CONTENT VIEWING ON SOCIAL MEDIA

36% people watched video content in the **(P7D)**

Top 4 Social Media Sites P7D

facebook Visited Facebook **72%**



Visited TikTok **44%**

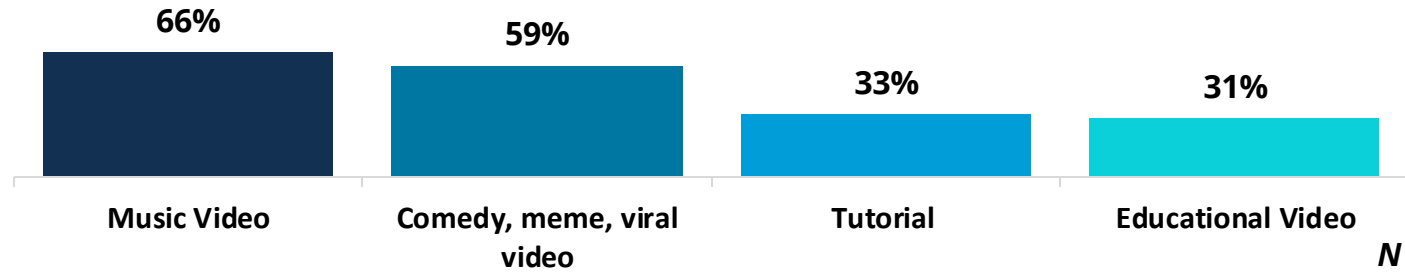


Visited YouTube **28%**

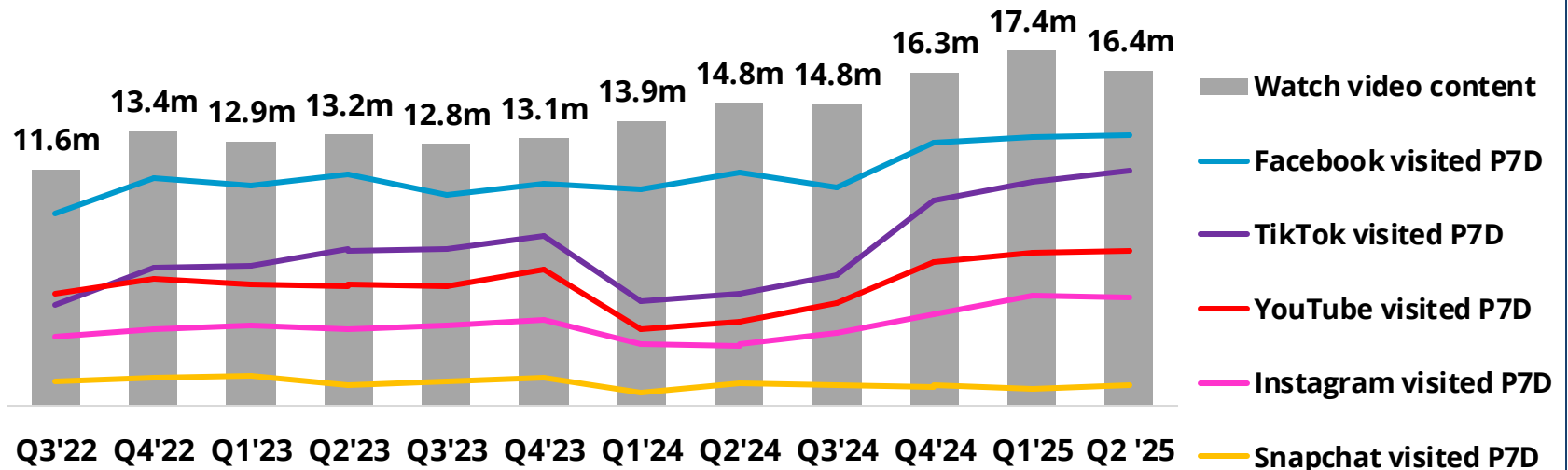


Visited Instagram **21%**

Video Content Types P4W



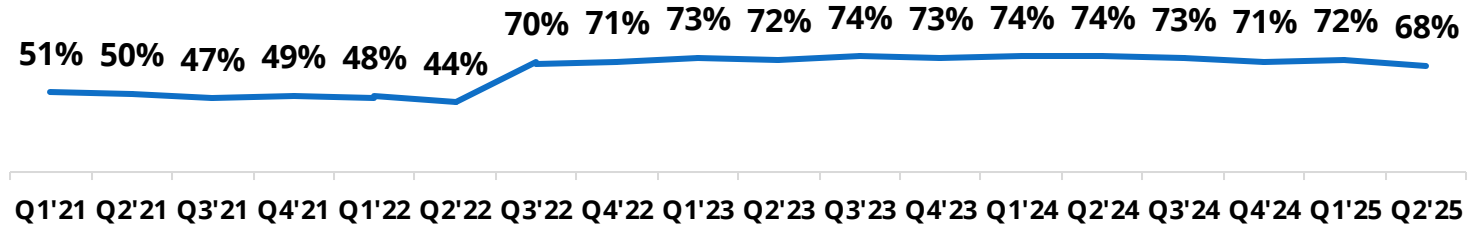
Filter: Video Content Viewed



32% of South Africans spend more than 20 hours per week on social media.

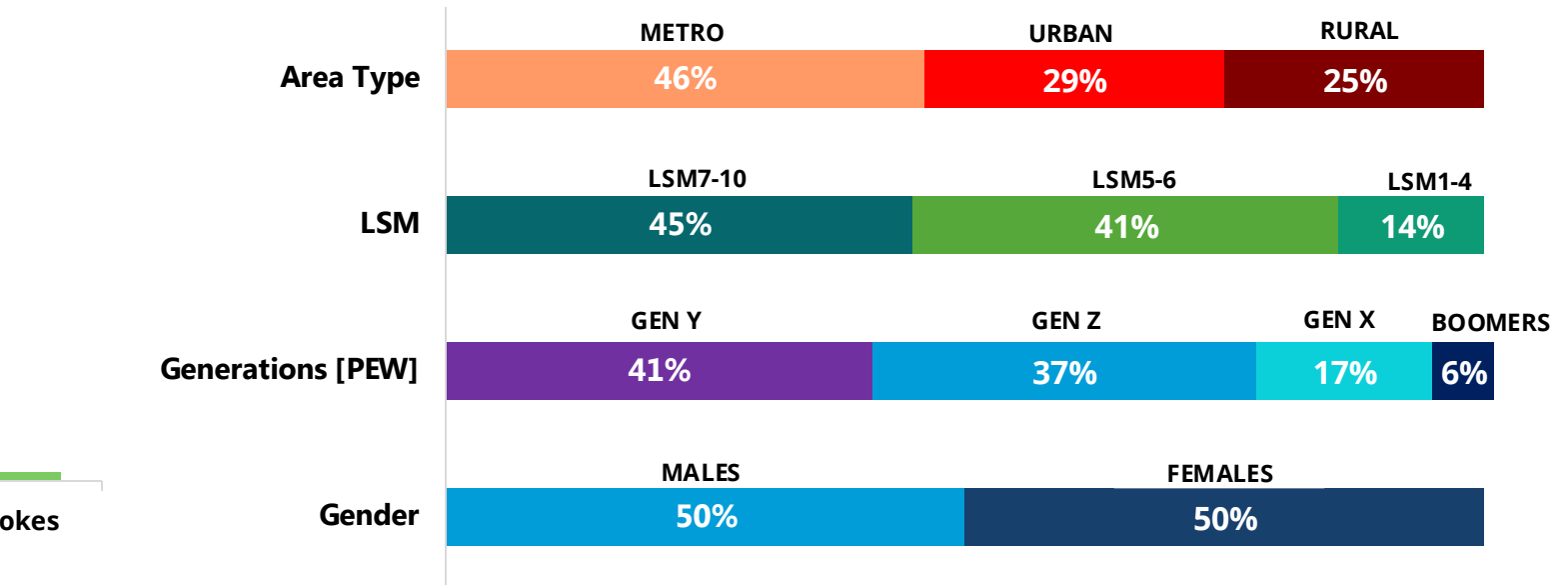
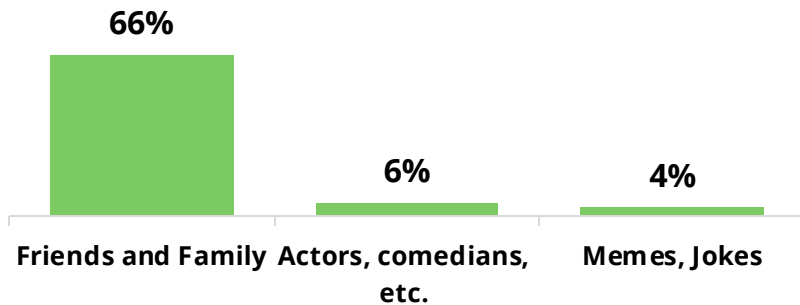
15.3M South Africans top social media profiles or pages followed is of **Friends, family and people they know.**

Social Media* P4W



Year 5
Social Media Penetration (P4W)
71%
Average

Top 3 Social Media Pages followed



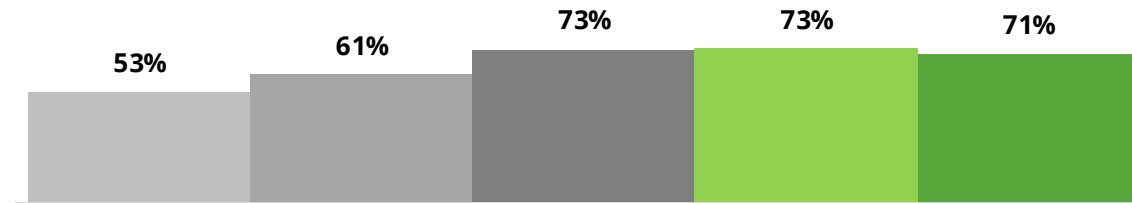
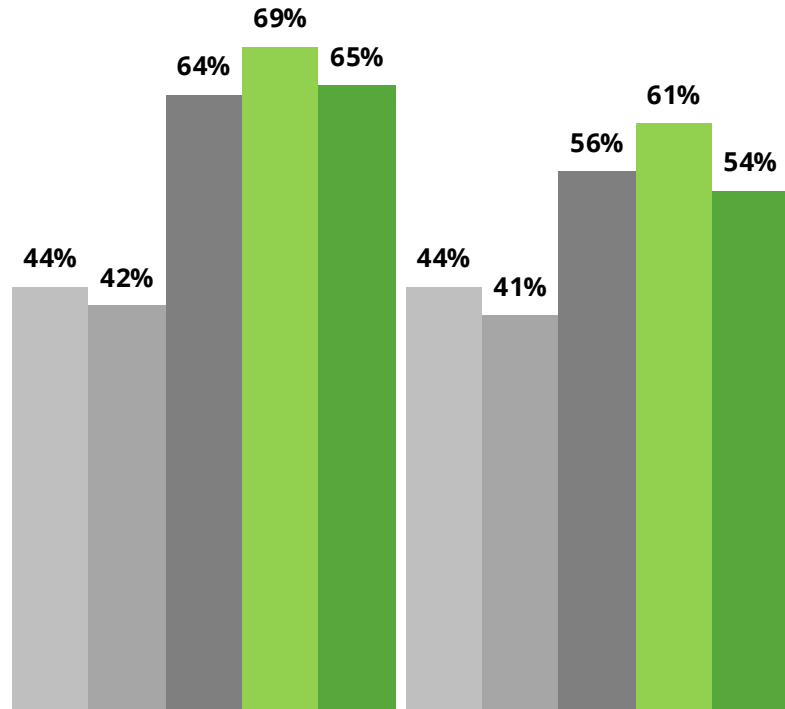
P4W: TOP 3 SOCIAL MEDIA PLATFORMS



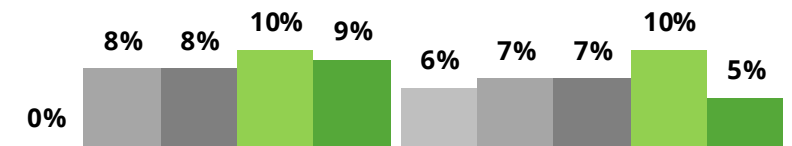
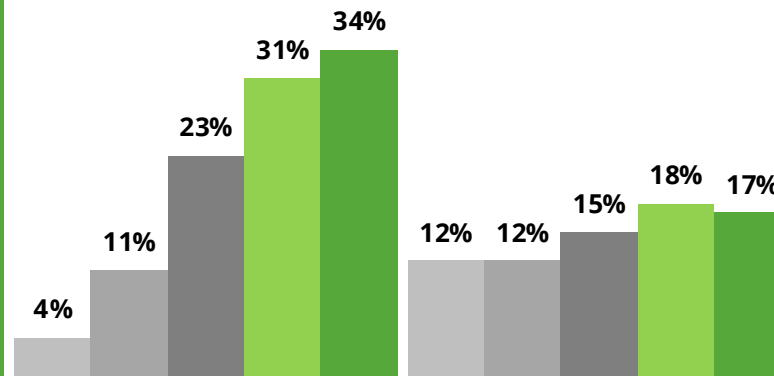
N = 32 398 059

SOCIAL MEDIA SHIFTS: % POP YoY

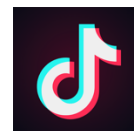
- Year 1
- Year 2
- Year 3
- Year 4
- Year 5



Social Media Penetration YoY

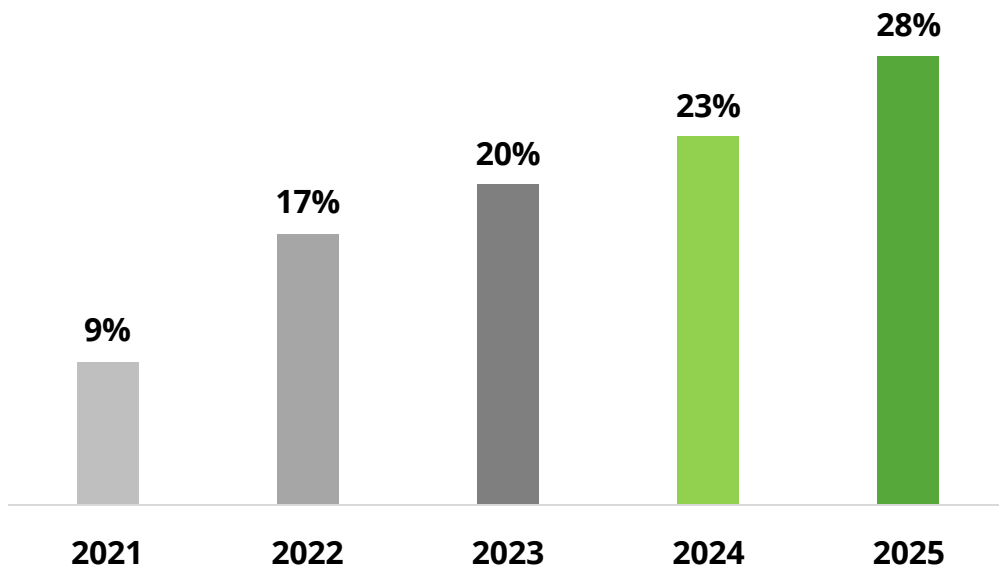


facebook

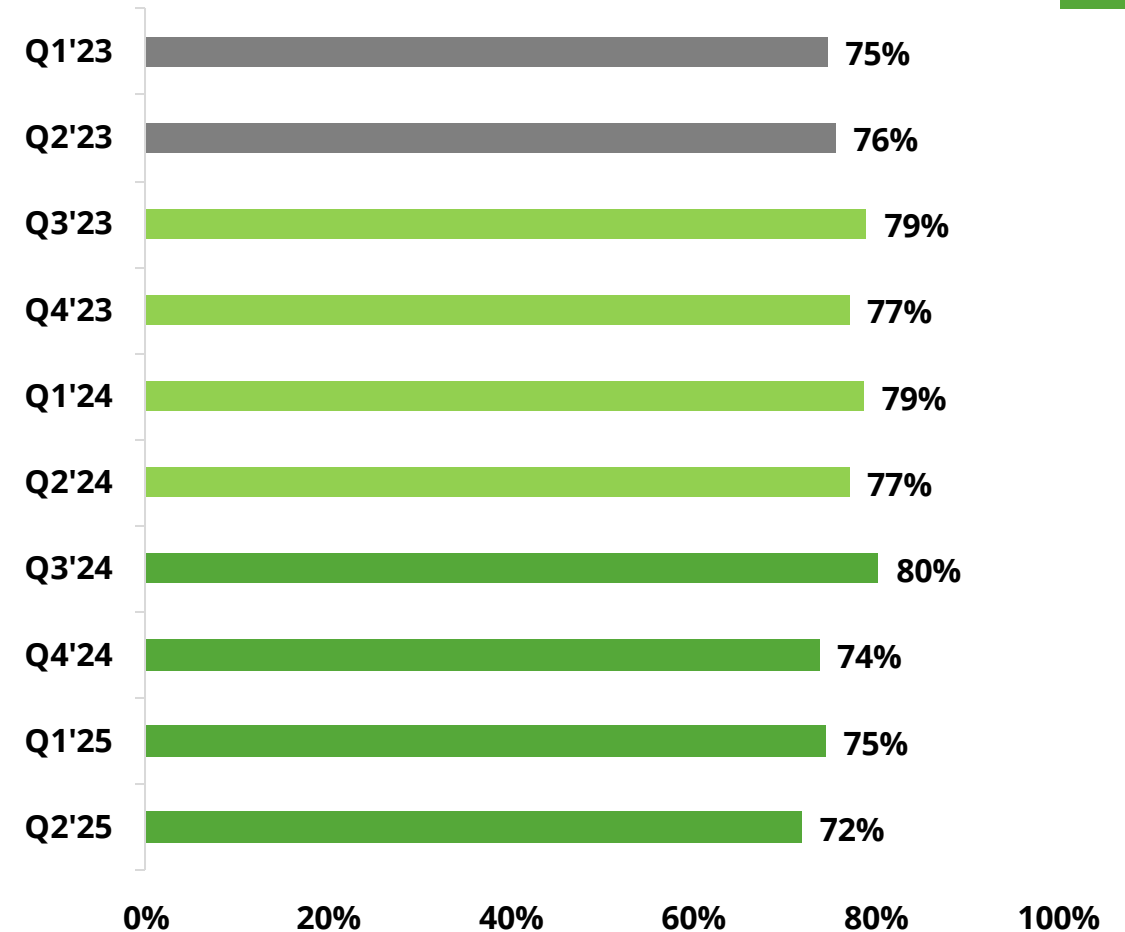


Internet Connection in the home

5.5m Households now have fixed internet access, an increase of 40% between Year 4 and Year 5



Accessed Internet Past 7 Days

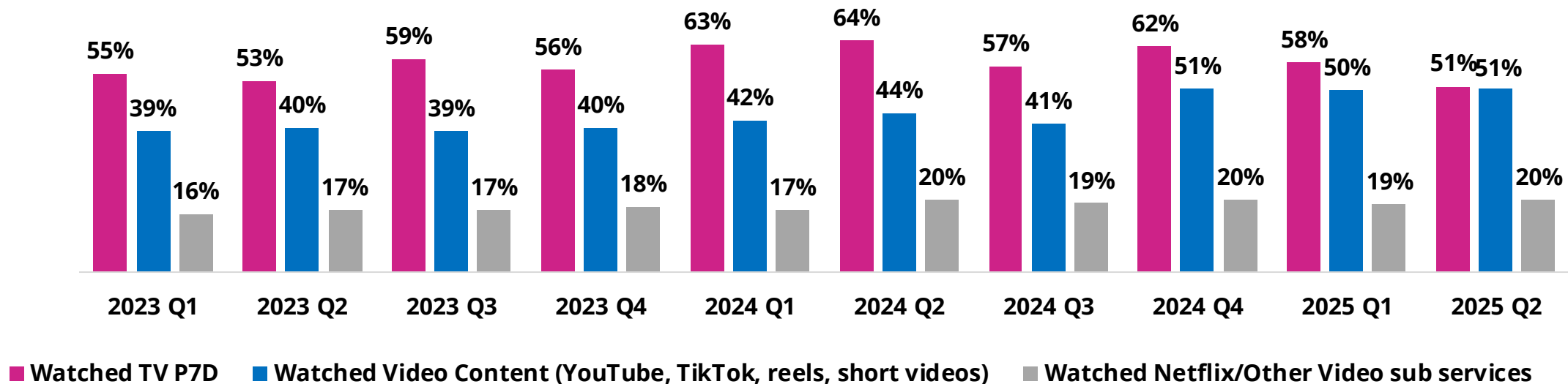


Year 3

Year 4

Year 5

Video Content Viewing Total Population: Filtered on Accessed Internet P7D



90% of people who watched video content visited any of these social media platforms in the past seven days.



RADIO LANDSCAPE (P7D)

15% of people spend **more than 20 hours** per week listening to the radio

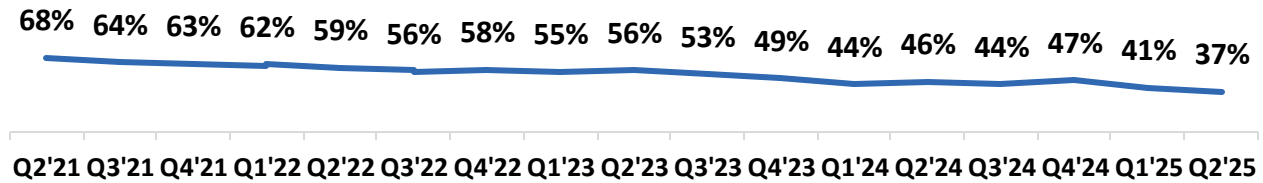
346K spend **more than 20 hours** per week listening to a podcast

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

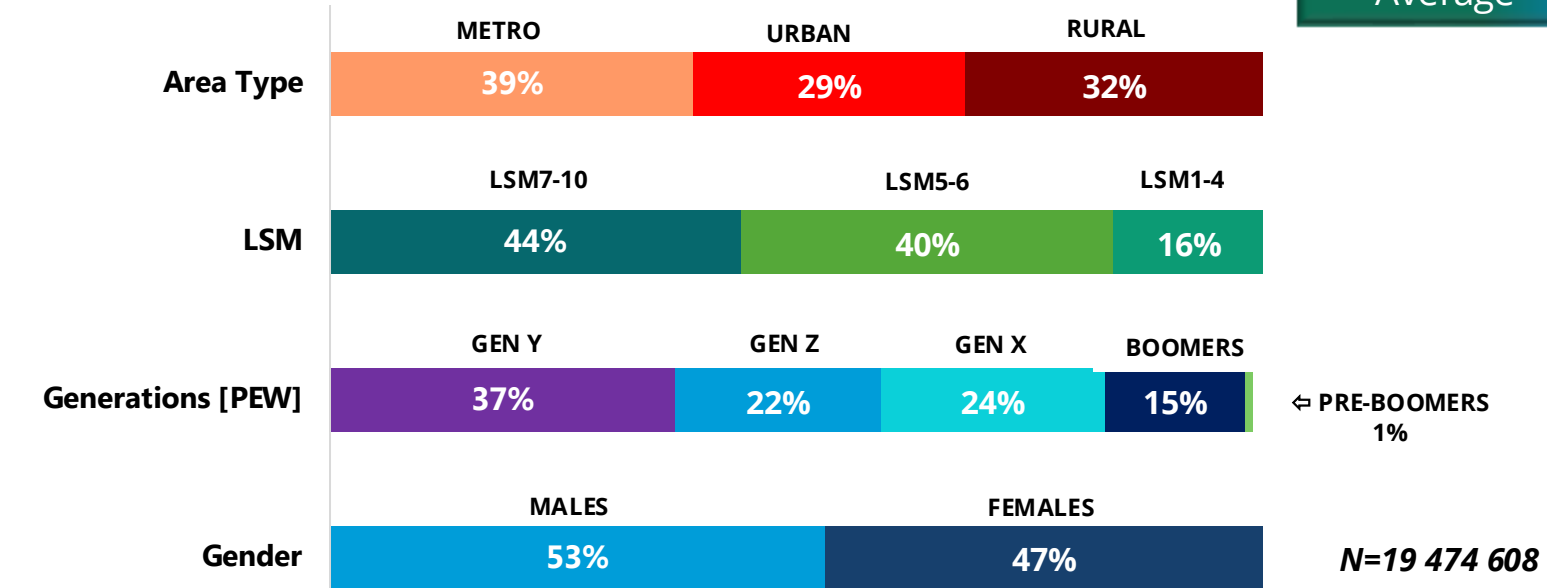
3M listened to **Community Stations (P7D)**

72K listened to **Internet radio stations (P7D)**

Listened to radio stations*P7D



Year 5
Radio Penetration (P7D)
43%
Average



P7D: TOP 5 Radio Stations



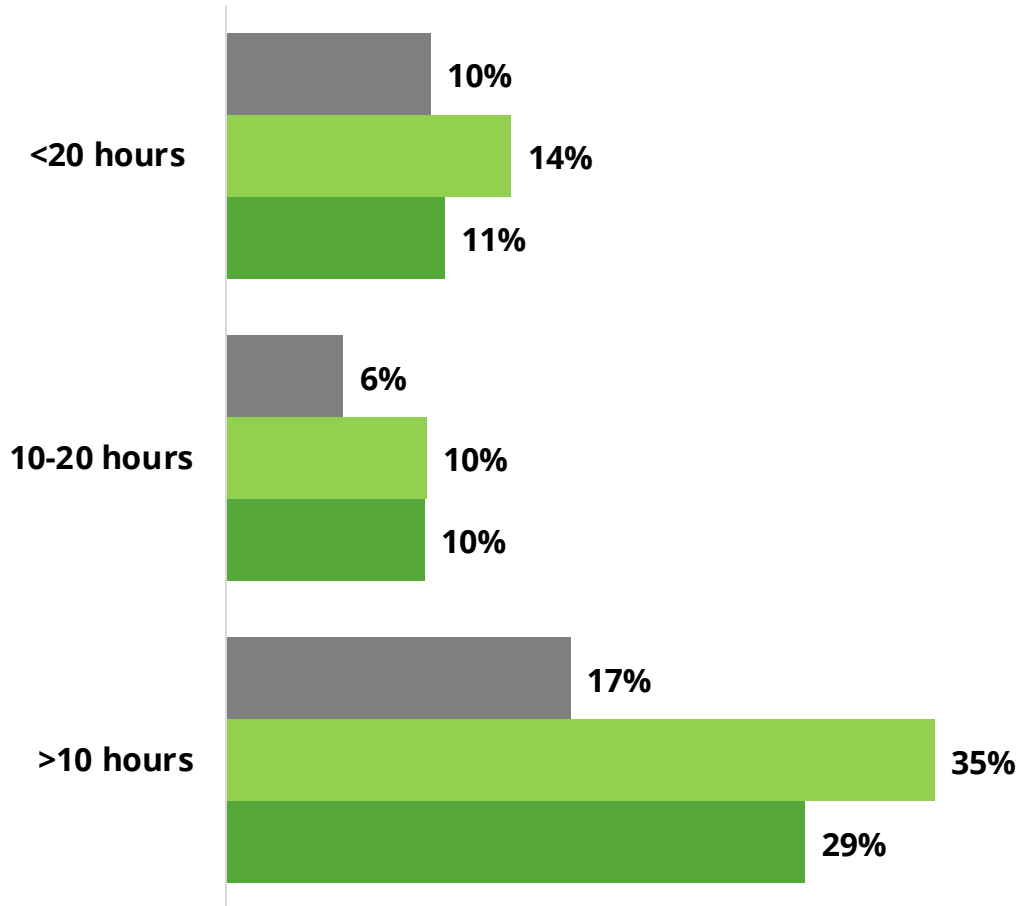
RADIO HOURS LISTENED / LISTENING BY AGE GROUP

Year 3

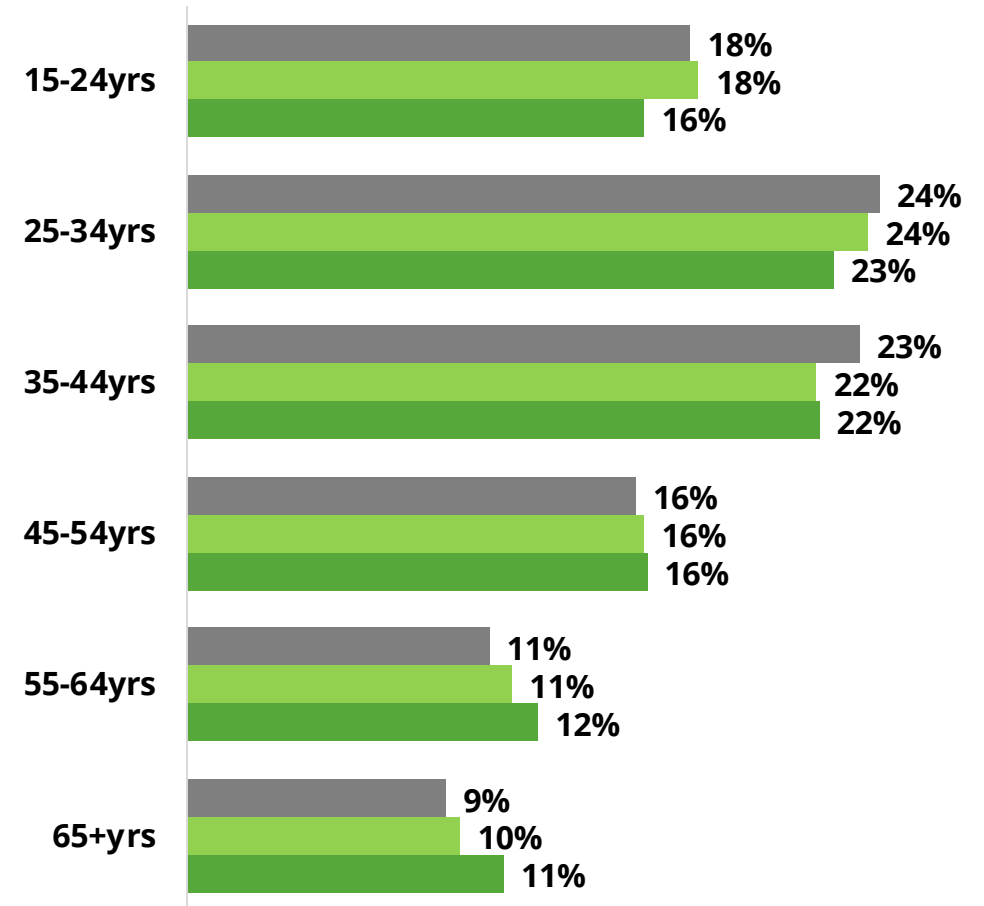
Year 4

Year 5

Hours Listened in Average Week



Listened P7D



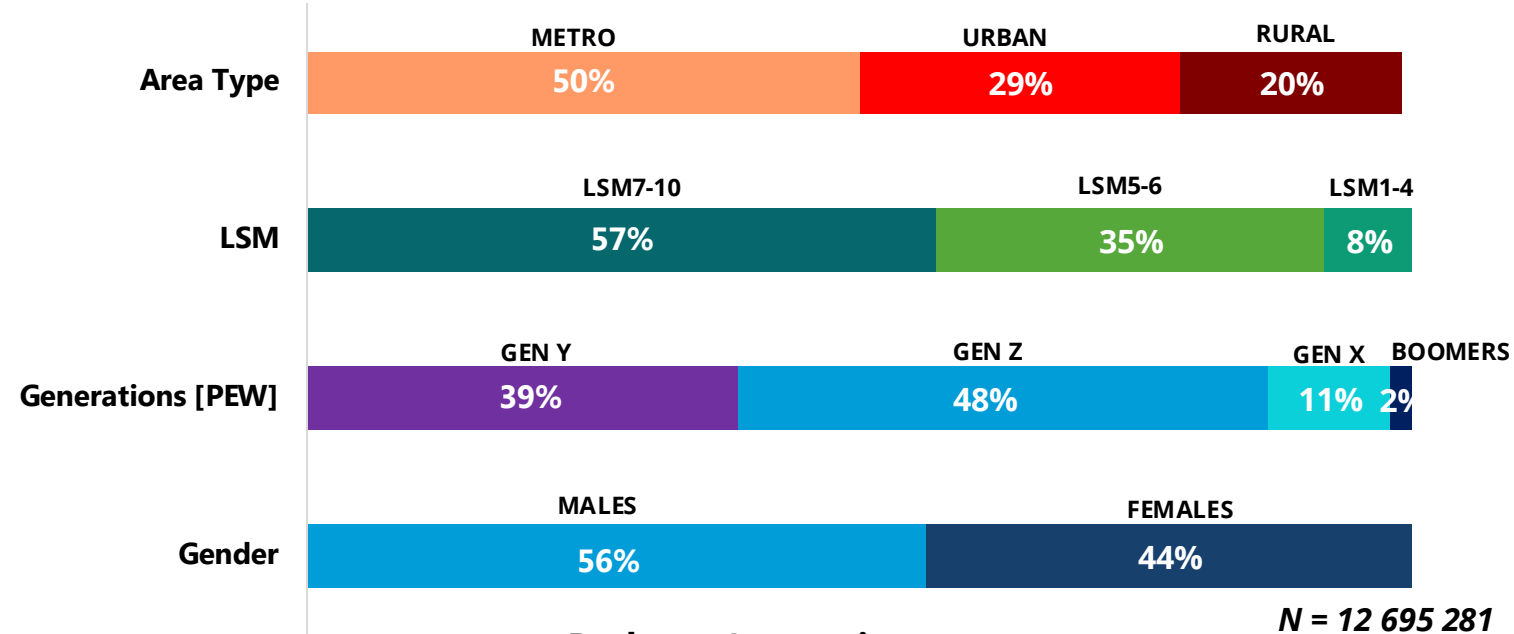
AUDIO/ MUSIC STREAMING LANDSCAPE

28% People stream audio weekly.

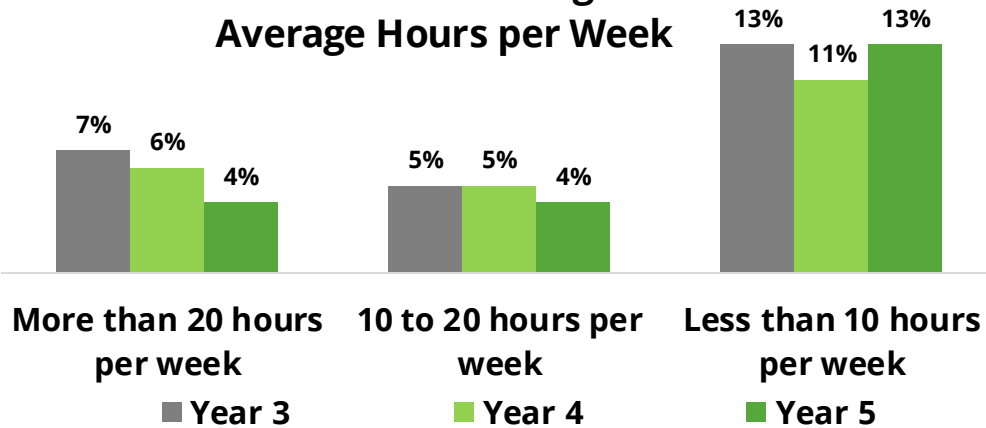
20% of people spend **more than 20 hours** per week streaming audio.

12.7M people **have access** to audio online streaming services.

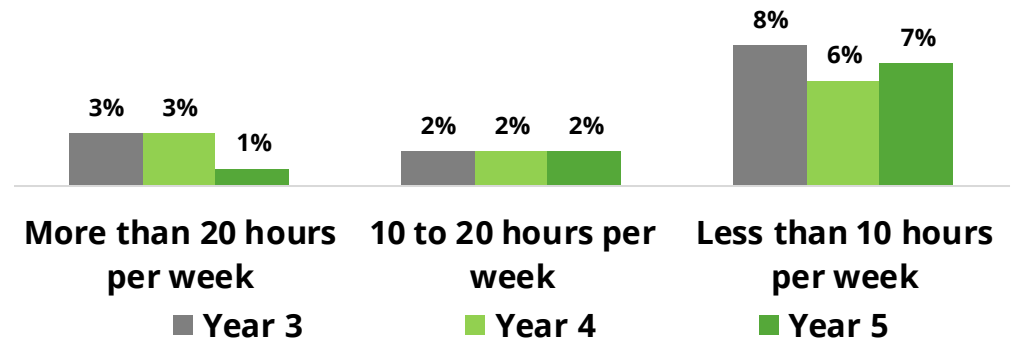
5% people **download vod/podcasts** weekly.



Audio Streaming: Average Hours per Week

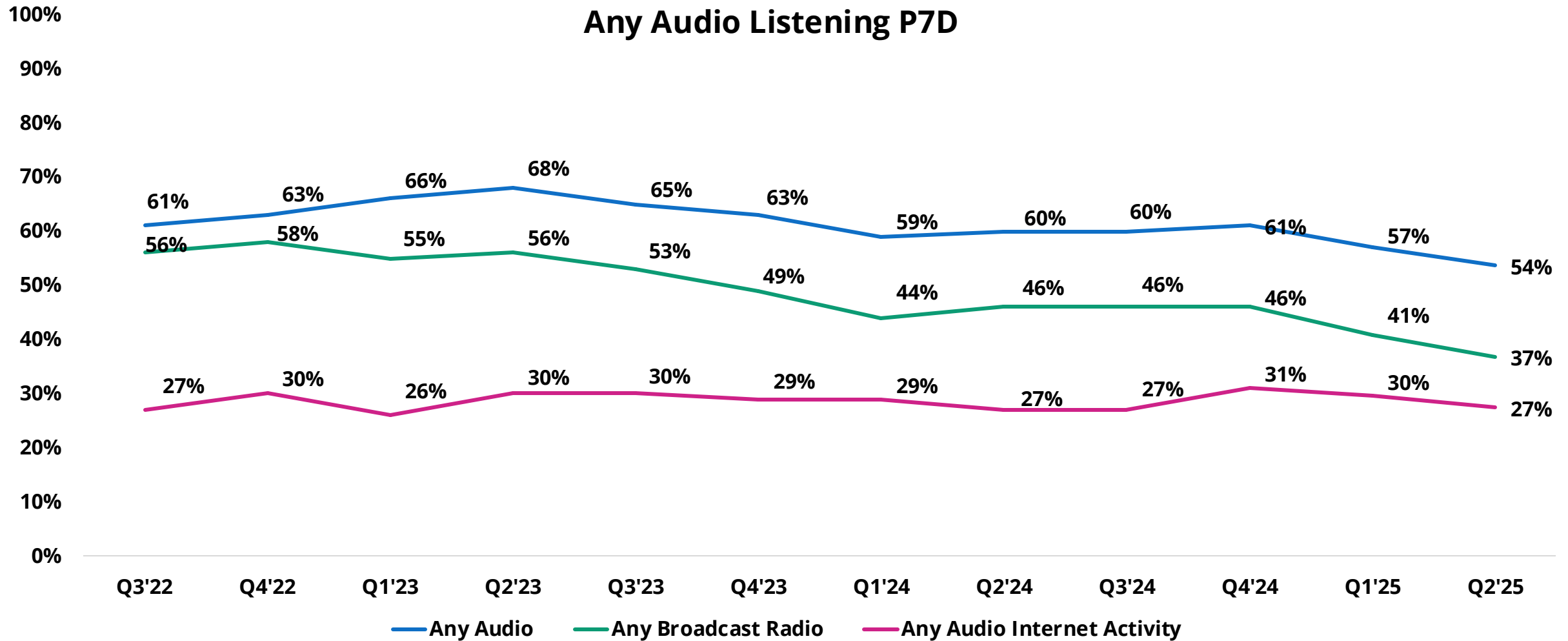


Podcast Streaming: Average Hours per Week



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

499K people regularly go to the **Cinema** once every 2 to 3 months.

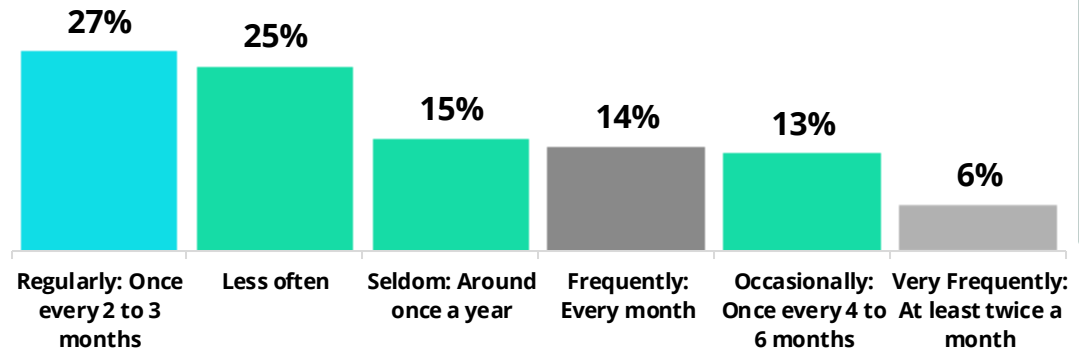


R454 average cinema outing cost.

TOP 4 Cinema Chains Visited

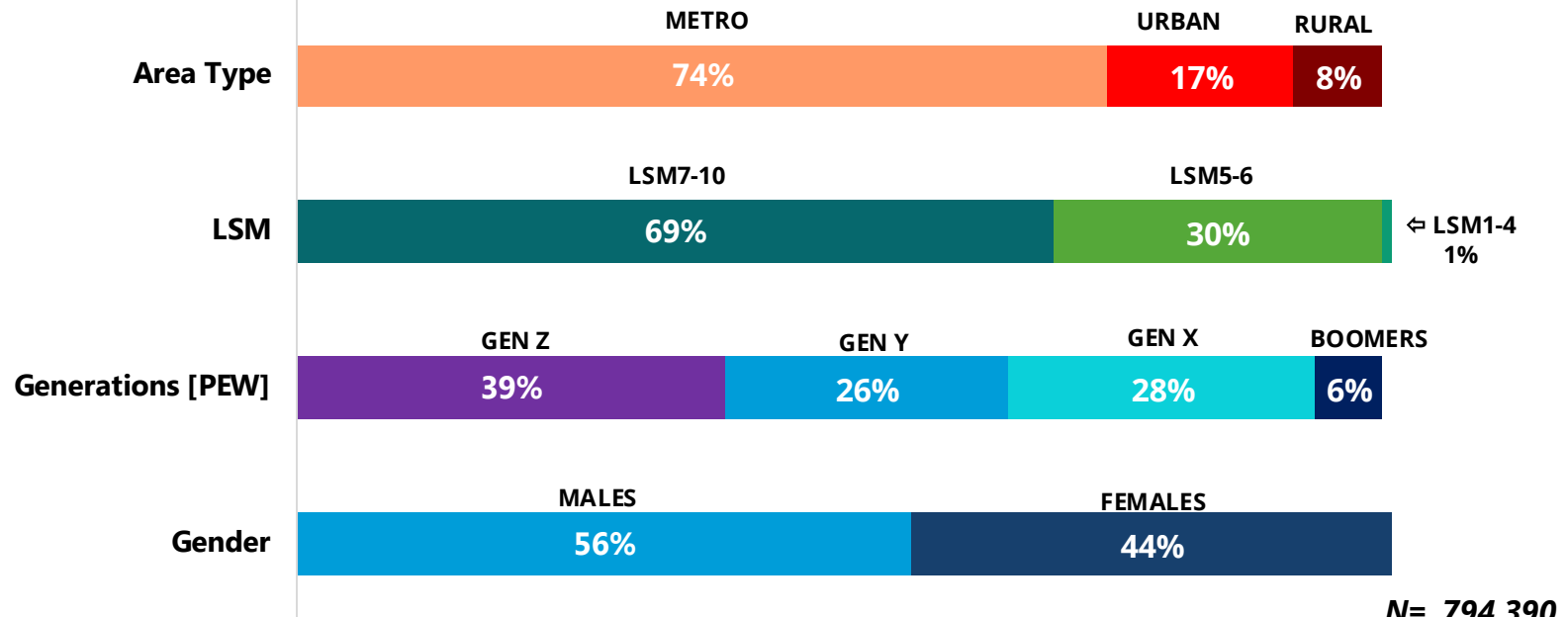
	743K Visited most often
	779K Visited most often
	173K Visited most often
	78K Visited most often

Cinema Visit Behaviour



Year 5
Cinema Penetration (P4W)
2%
Average

N = 1 864 893



N = 794 390

MAGAZINE LANDSCAPE (P3M)

2.9M People read magazines in the (P3M)

Top 4 Magazines

DRUM

19% Read P3M

HUIS genoot

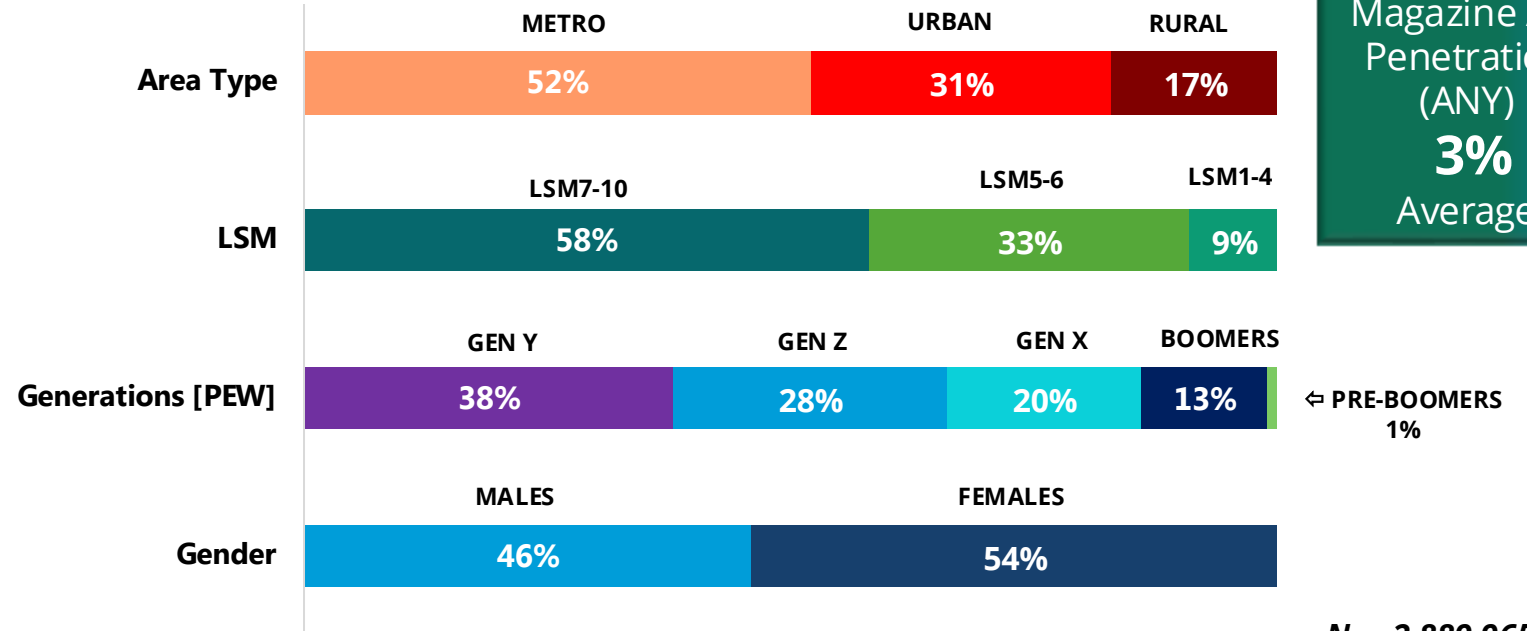
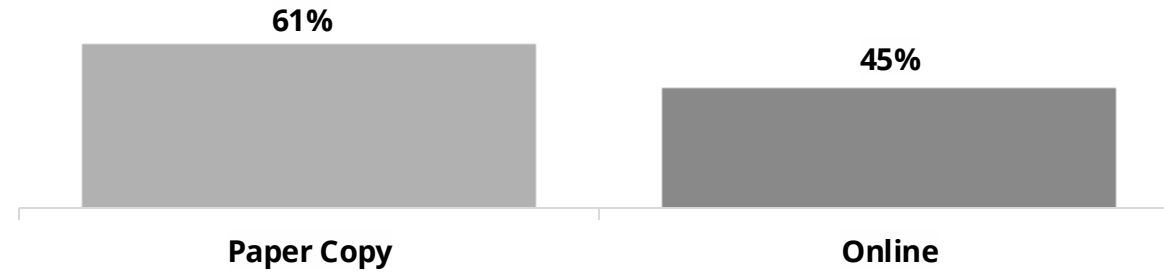
9% Read P3M

YOU

10% Read P3M

KICKOFF

5% Read P3M



Year 5
Magazine Penetration (P3M)
6%
Average

Year 5
Magazine AIR Penetration (ANY)
3%
Average

N = 2 889 965

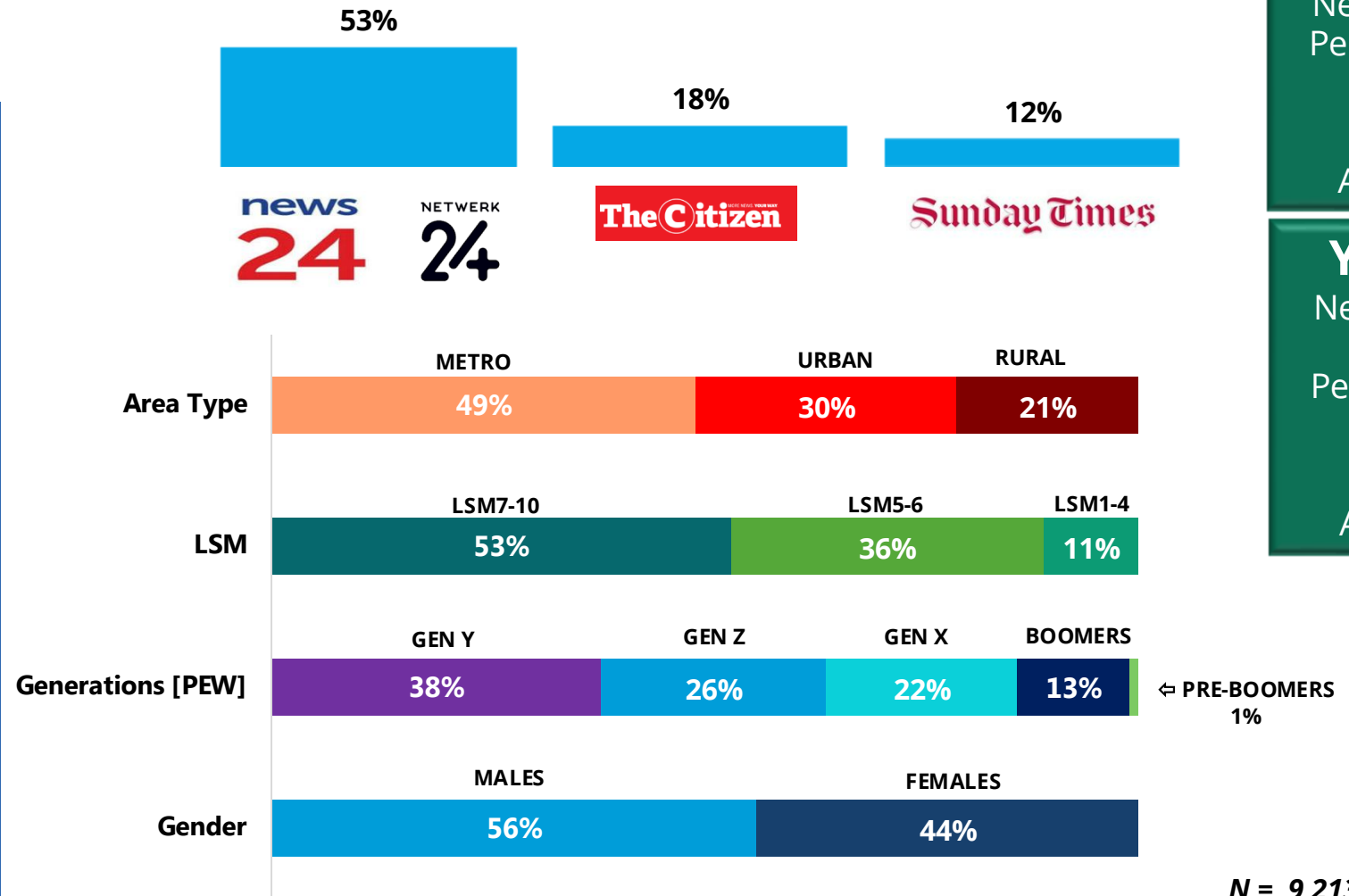
NEWSPAPER LANDSCAPE (P3M)

9.2M People read Newspapers in the **(P3M)**

Top 4 Daily Newspapers

DAILY SUN	1.8M Read P3M
Isolezwe <small>NGEMPELASANTO</small>	1.4M Read P3M
Sowetan	585K Read P3M
DailyNews	568K Read P3M

PAID NEWS ACCESS

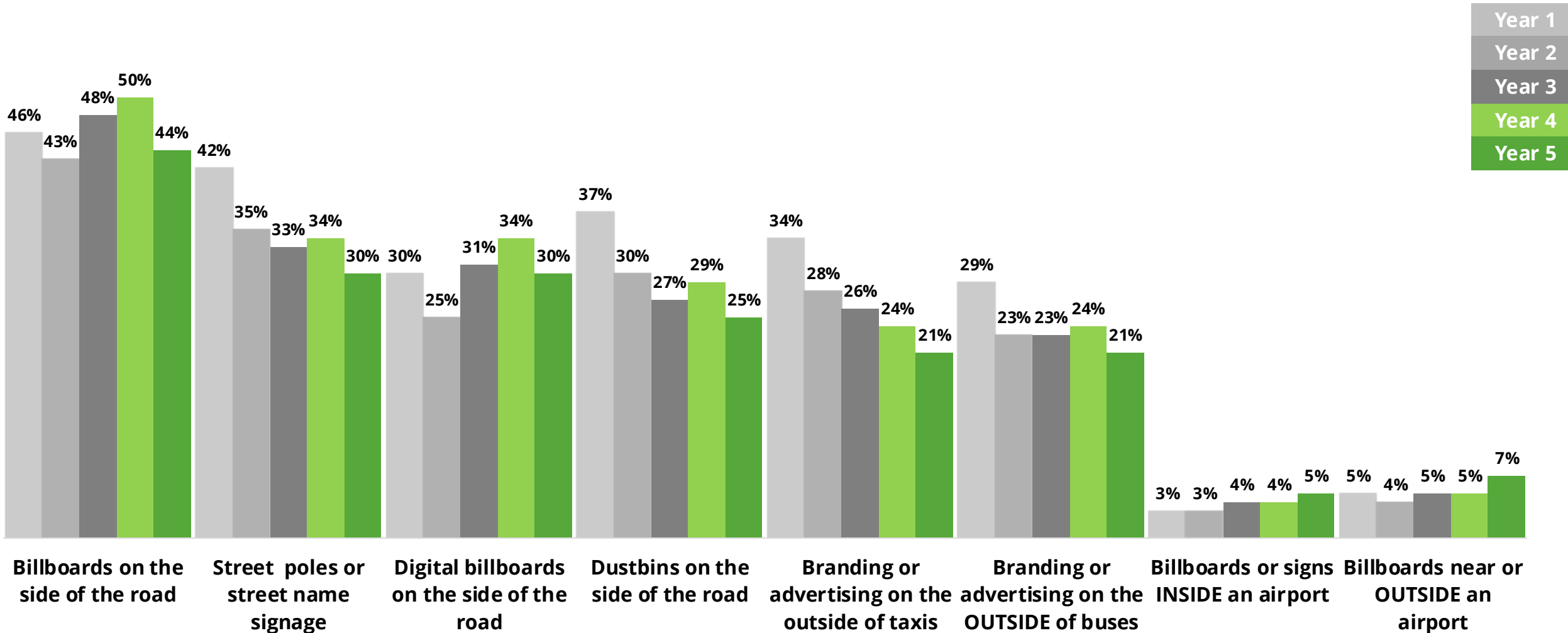


Year 5
Newspaper Penetration (P3M)
20%
Average

Year 5
Newspaper AIR Penetration (ANY)
6%
Average

N = 9 213 621

OUT OF HOME P4W SHIFTS: % POP YoY



Financial Services



MARKETING RESEARCH
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RESEARCH



74% have a bank account excluding the SASSA accounts



58% of medical aid cover respondents are the main members.

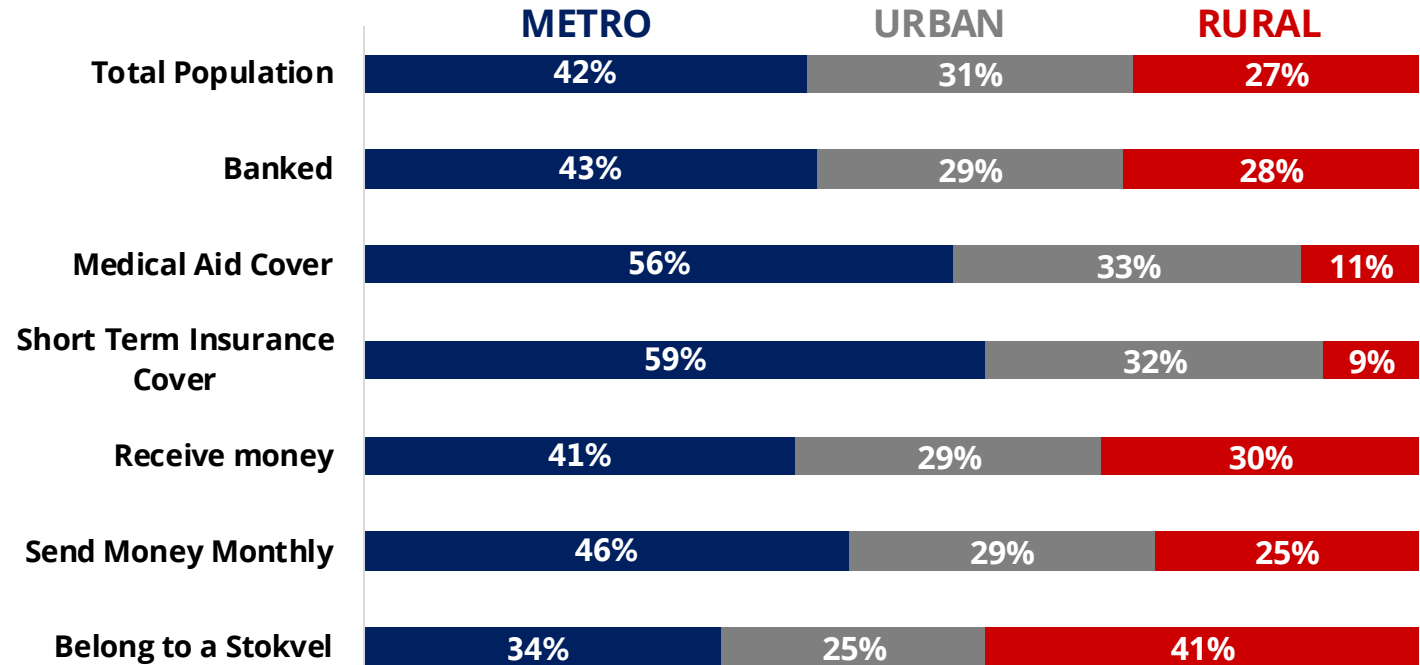


38% are insured

33% have funeral insurance or policy

3% have short term insurance.

Distribution by Area

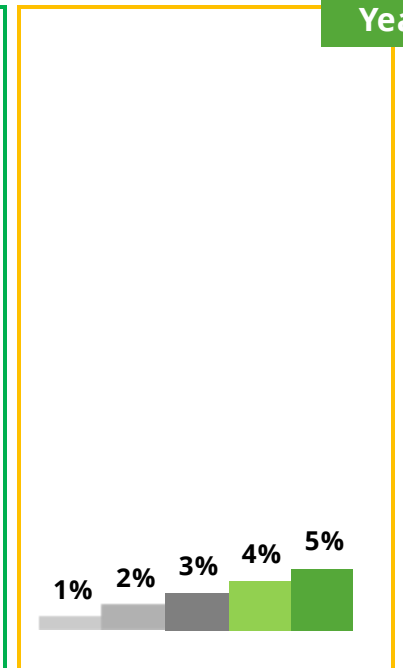
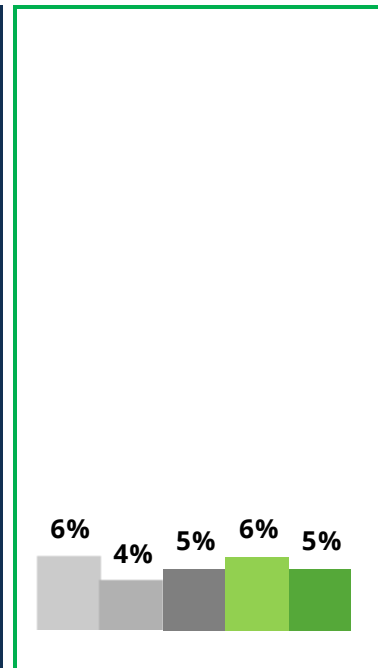
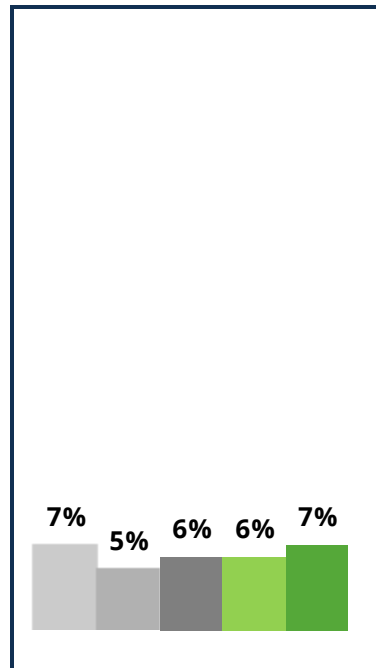
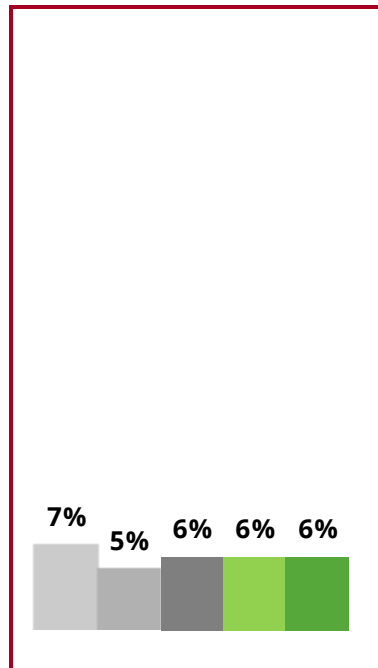
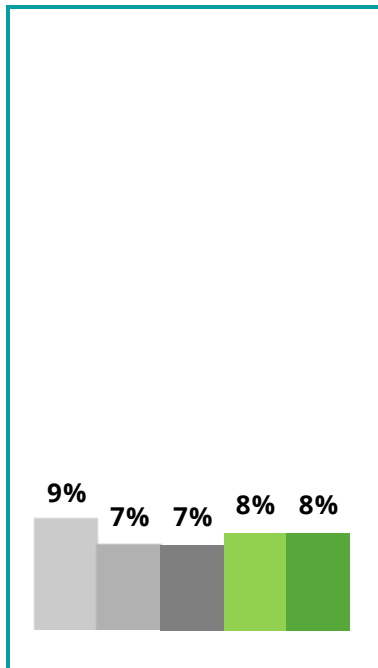
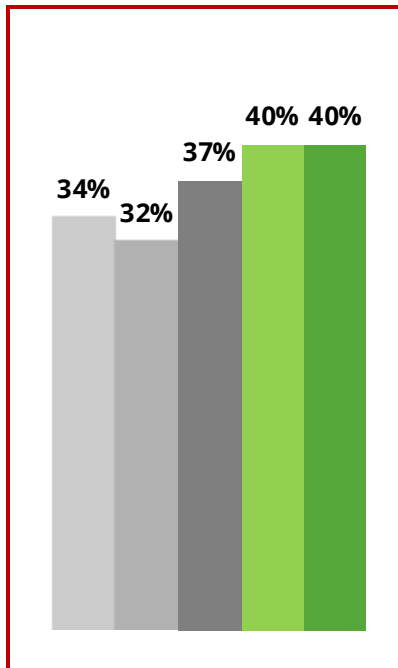


23% transfer or send money to family or friends monthly. On average **R1097** is sent.

8.1% belong to a stokvel.

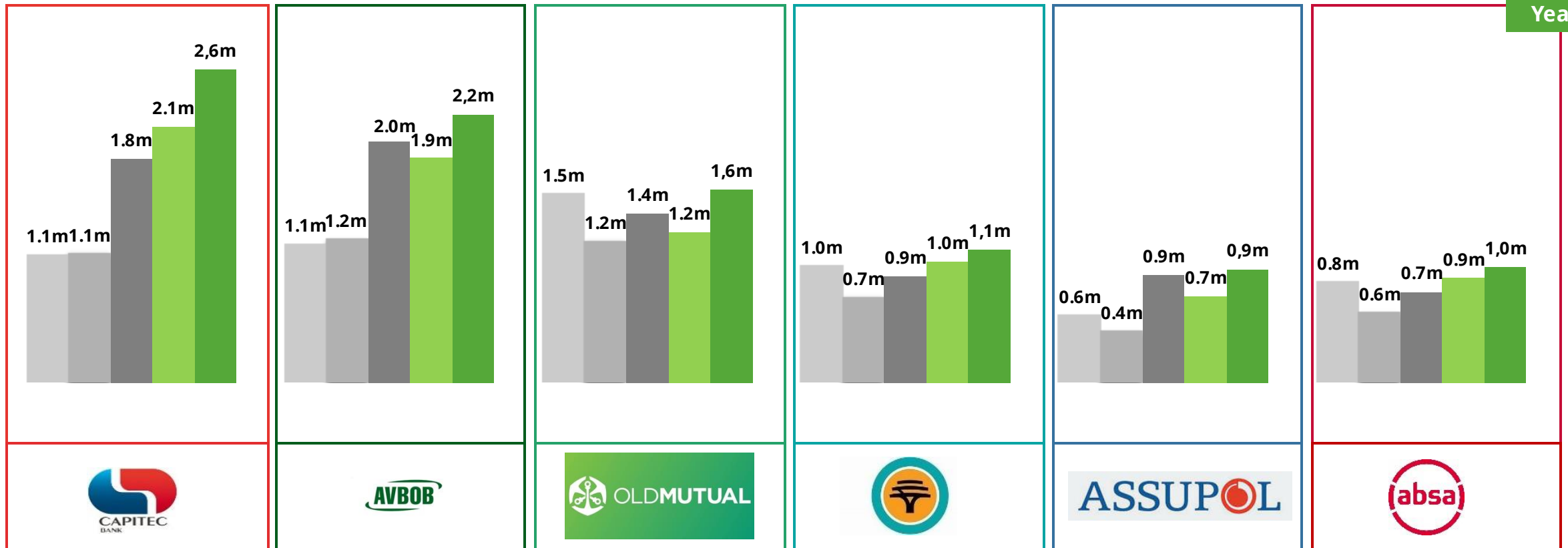
PRIMARY BANK: YoY

Year 1
Year 2
Year 3
Year 4
Year 5



ANY INSURANCE BY COMPANY USED: YoY

- Year 1
- Year 2
- Year 3
- Year 4
- Year 5



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

Retail



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RESEARCH



78% people spent **R300 or less** and **19%** 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



42% use this network



35% use this network

Telkom

14% use this network



8% use this network

N = 45 652 076

SIM Options

*For phones 1 and 2

92% cellphones on Prepaid

5% cellphones on Contract

3% cellphones on Top Up

N = 46 027 715

Buying Preference

*For phones 1 and 2

55% Buy both Airtime and Data

41% Buy Airtime

4% Buy Data bundles only

N = 46 029 496

Top 3 online shopping categories [P4W]

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

1.3M most often use food delivery service when purchasing take-aways.



P4W
132K

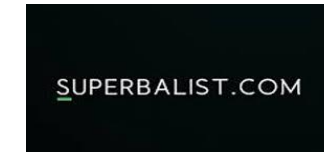


P4W
148K

CLOTHING PURCHASE ONLY*

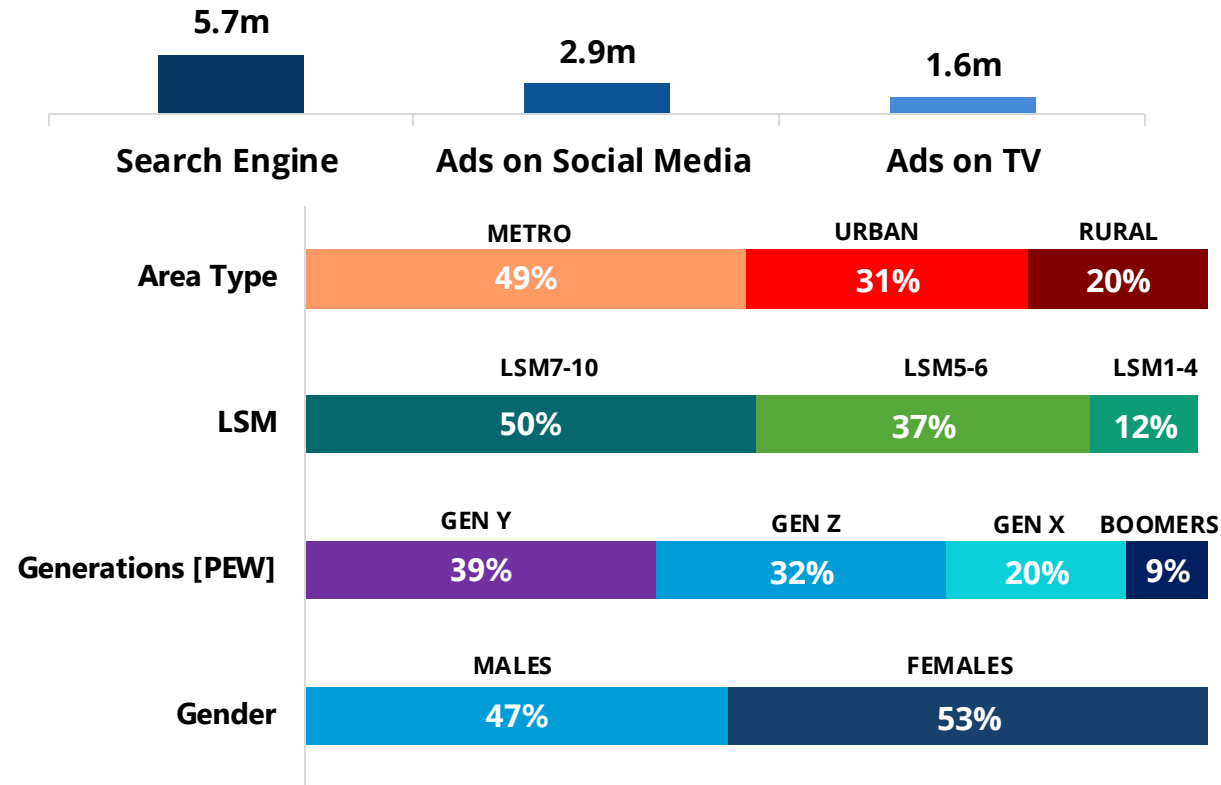


P3M
509K



P3M
60K

*How do you discover new brands?



Year 5

E-Commerce Penetration (P4W)
19%
Average

18%

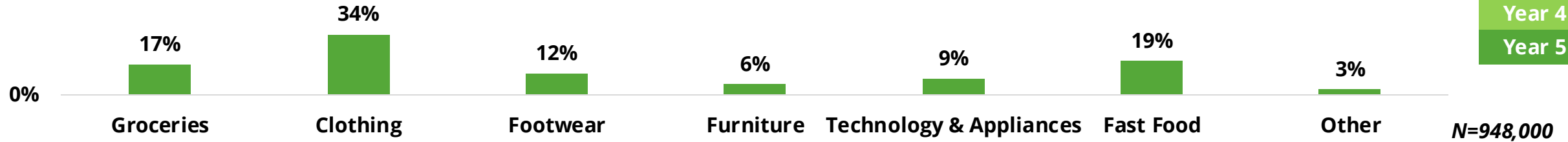
Research Brands before purchasing

CLOTHING: ONLINE SHOPPING

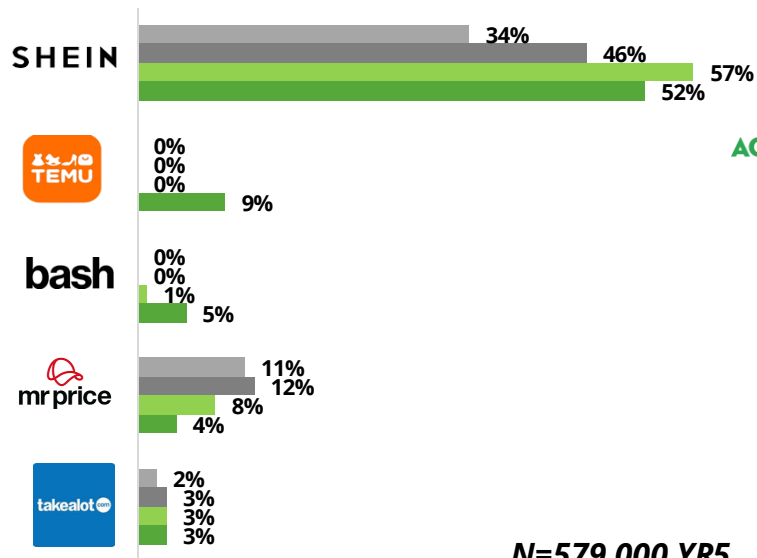
100%

Bought Online Past 4 Weeks Question Added Q2 2025

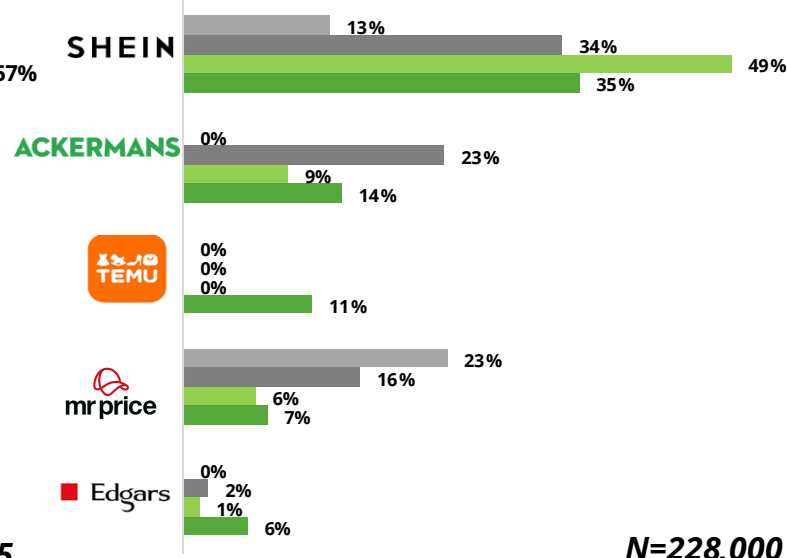
Year 1
Year 2
Year 3
Year 4
Year 5



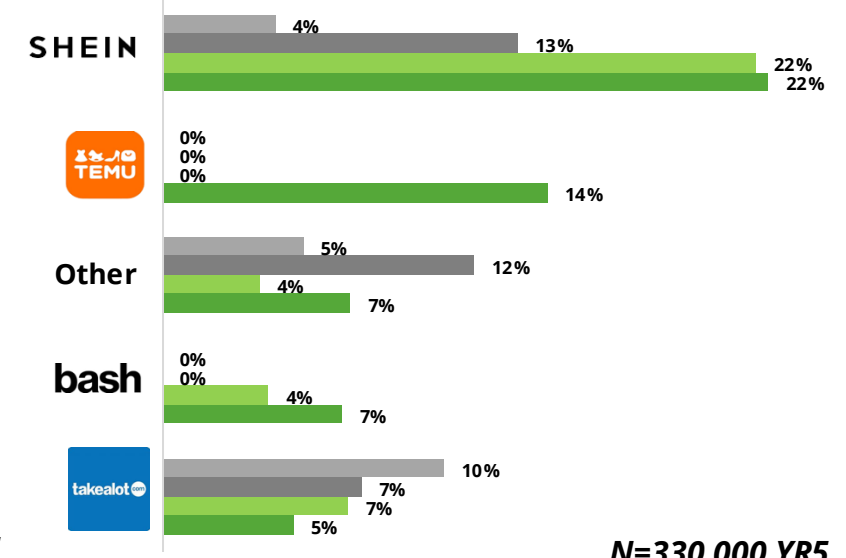
Top Online Retailers: Women



Top Online Retailers: Children



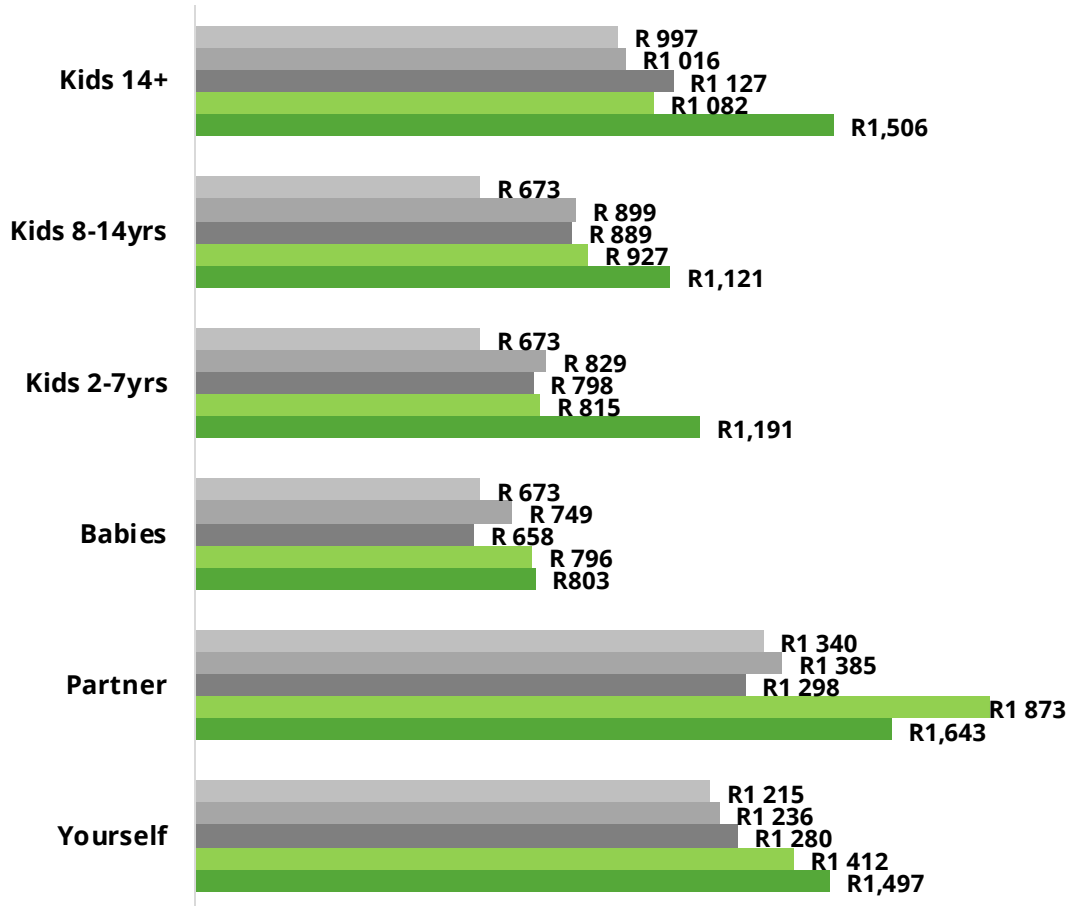
Top Online Retailers: Men



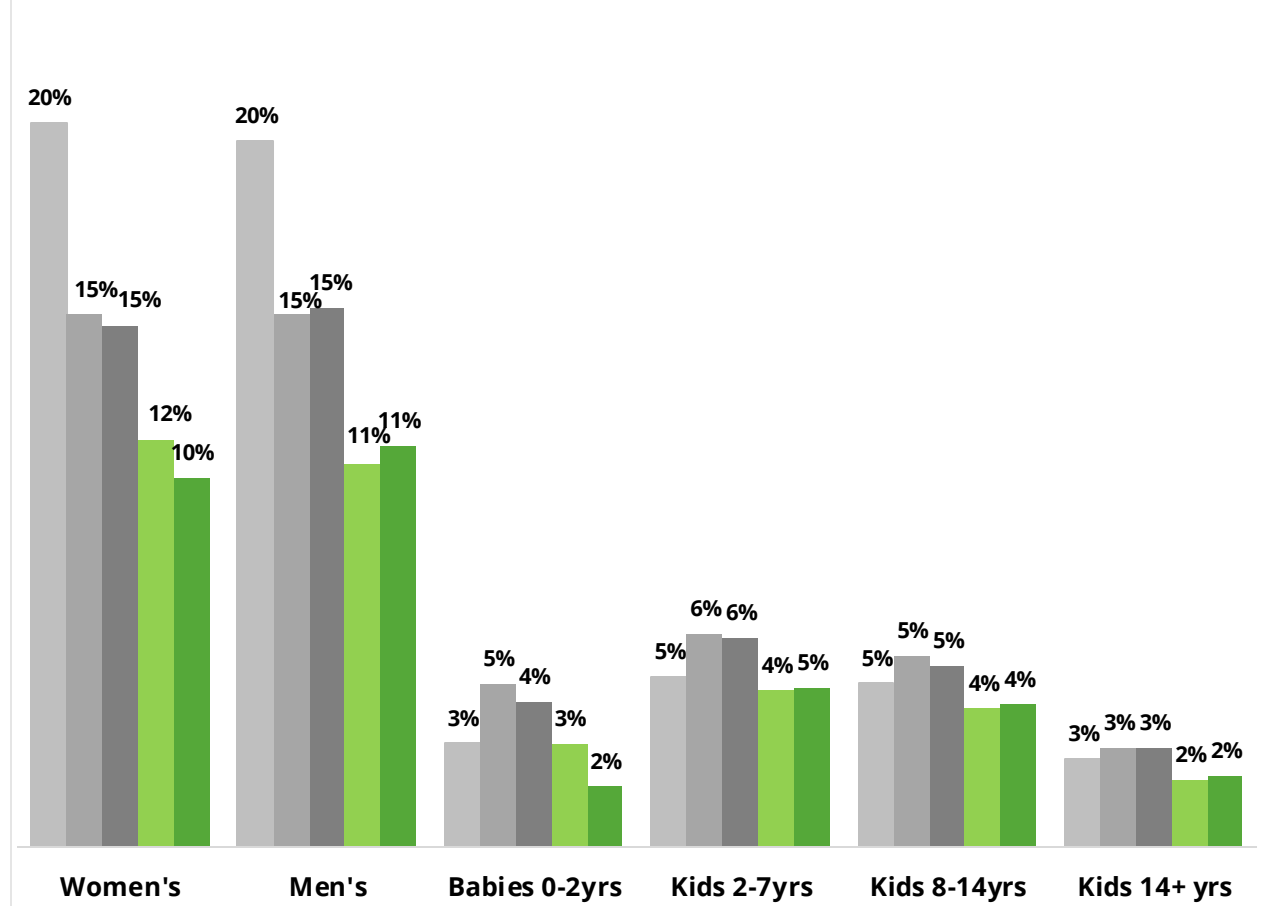
CLOTHING AVERAGE ANNUAL SPEND / BOUGHT PAST 3 MONTHS




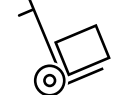
- Year 1
- Year 2
- Year 3
- Year 4
- Year 5

Clothing Average Spend P12M

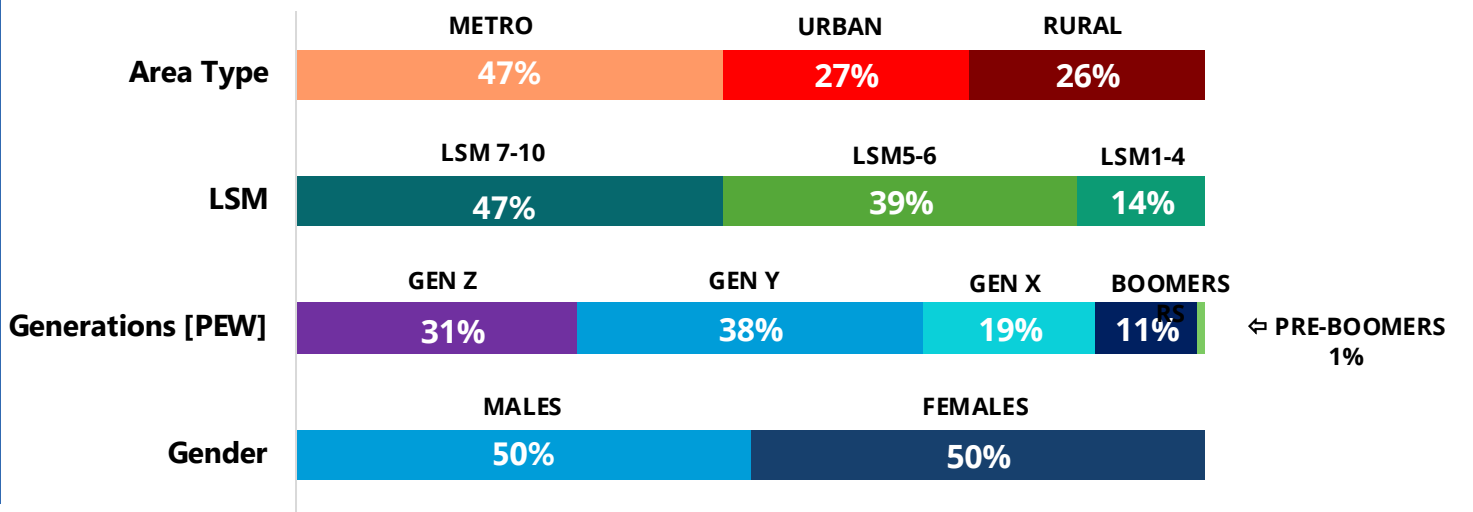


Clothing Bought P3M



-  **41%** bought fast food P4W
-  **R277** average spend on fast food on last restaurant visit.
-  **3** average party size on last restaurant outing.
-  **1.3M** use Fast Food delivery services.

Fast Food Purchases N = 18 577 091

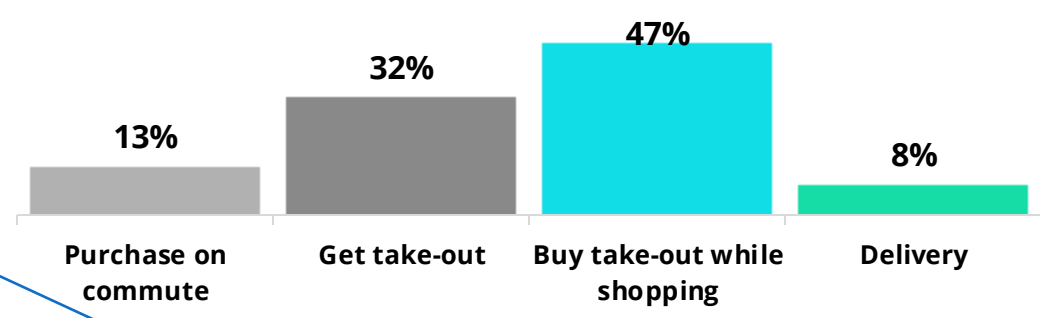



Most often used method to order food N = 23 207 155



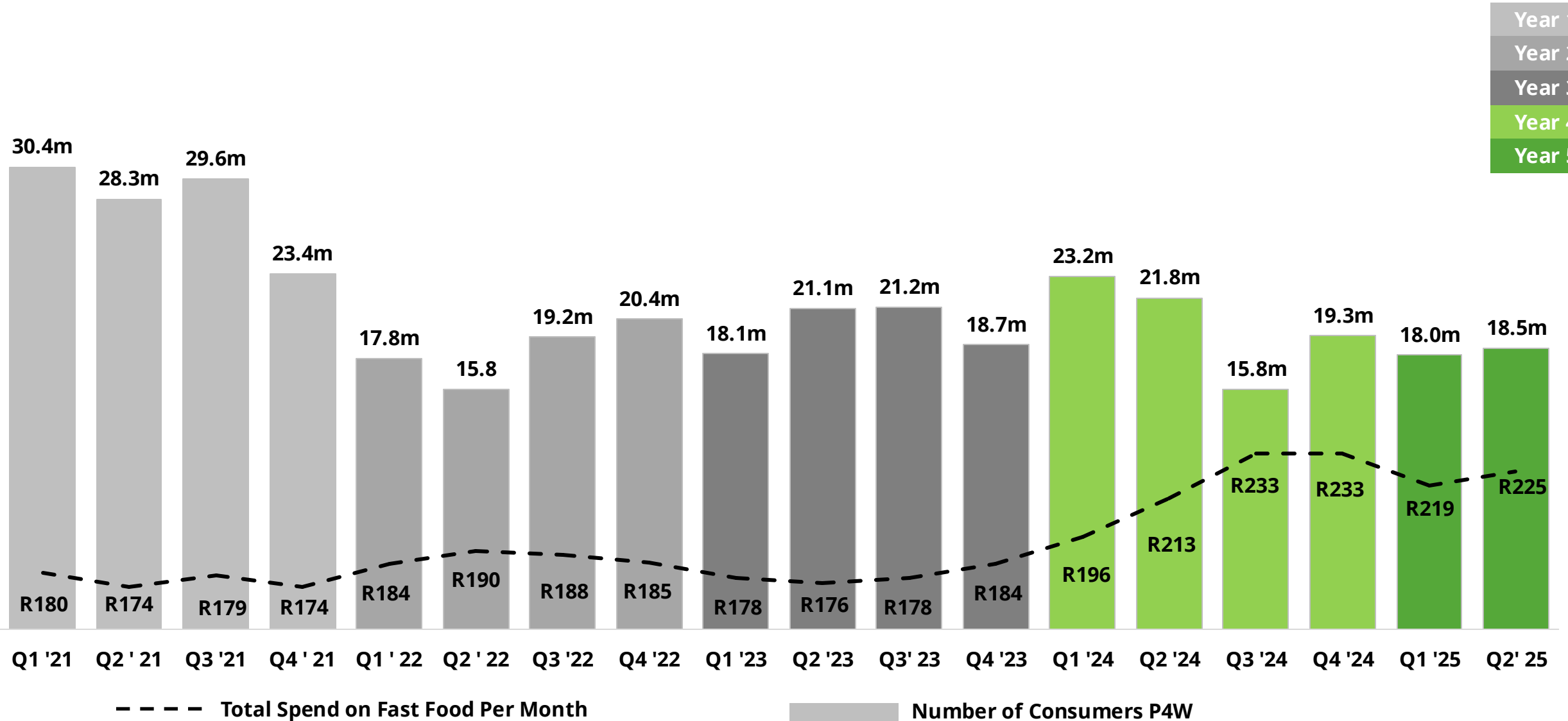
 **35% (P4W)** order from Uber Eats

Buying behaviour N = 19 704 819



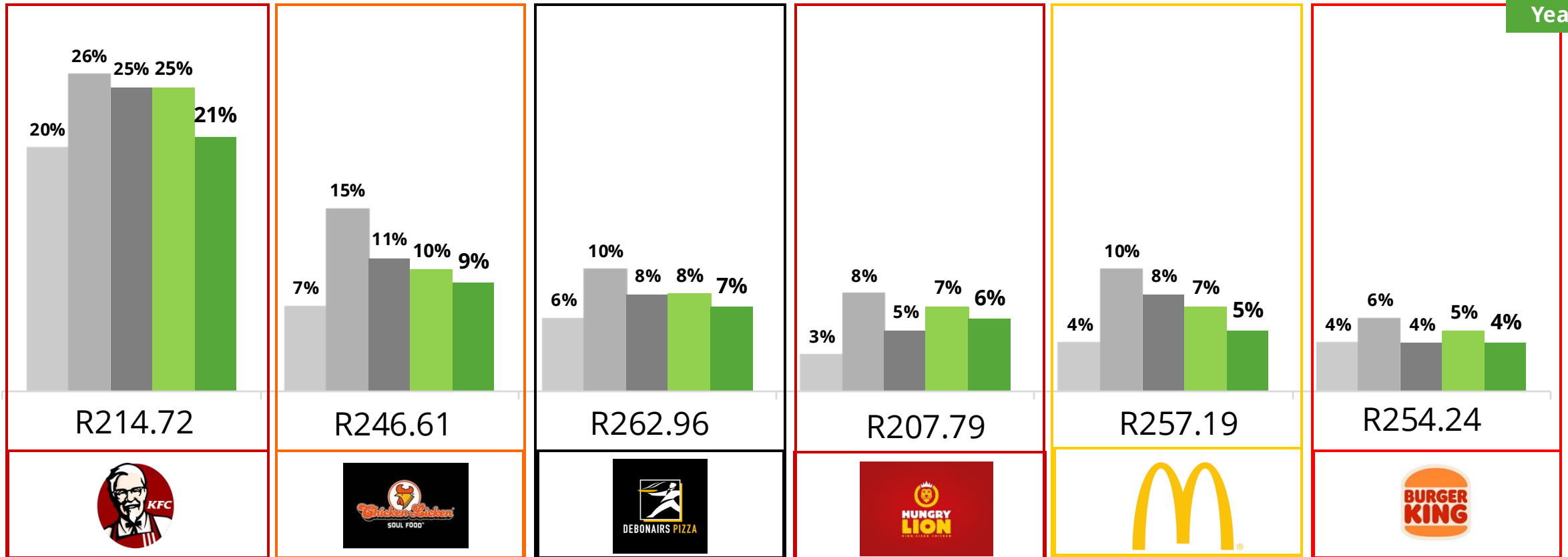
 **31% (P4W)** order from Mr. D

FAST FOOD CONSUMPTION AND EXPENDITURE (LAST VISIT): QoQ



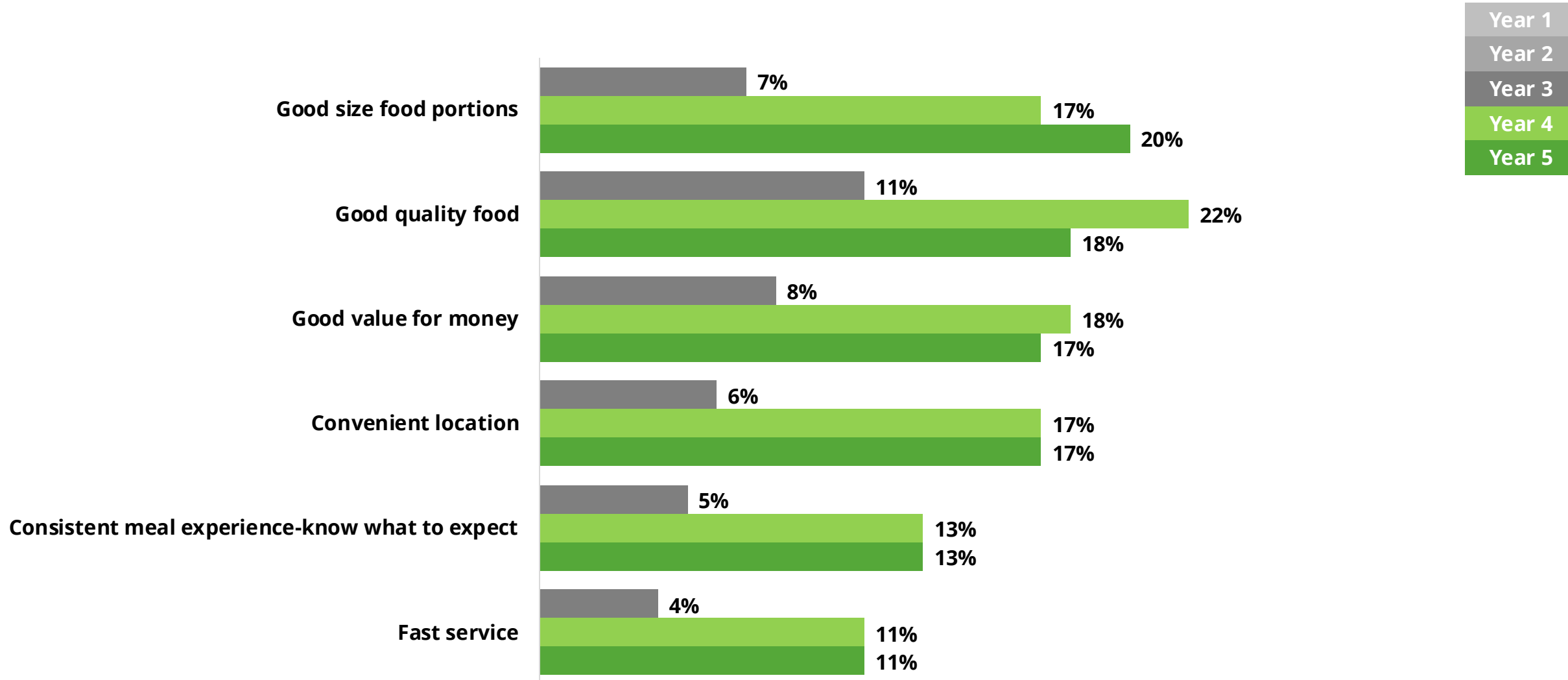
TOP 6 FAST FOOD BRANDS AND AVERAGE SPEND: YoY

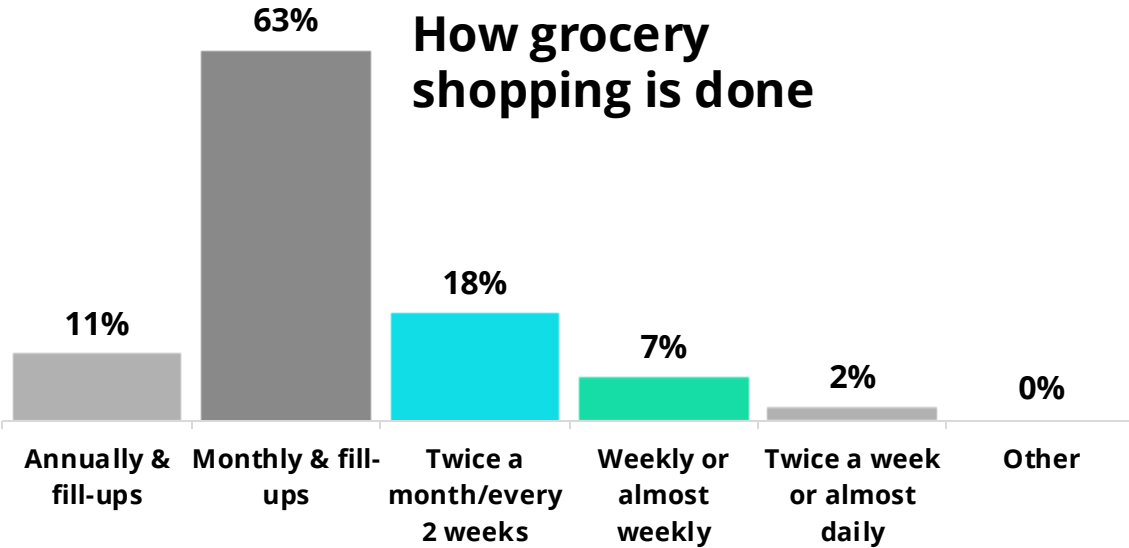
Year 1
Year 2
Year 3
Year 4
Year 5



* Year 5: Pedros, is 5%, slightly higher than burger king. An average of R250.11 is spent by consumers per month.

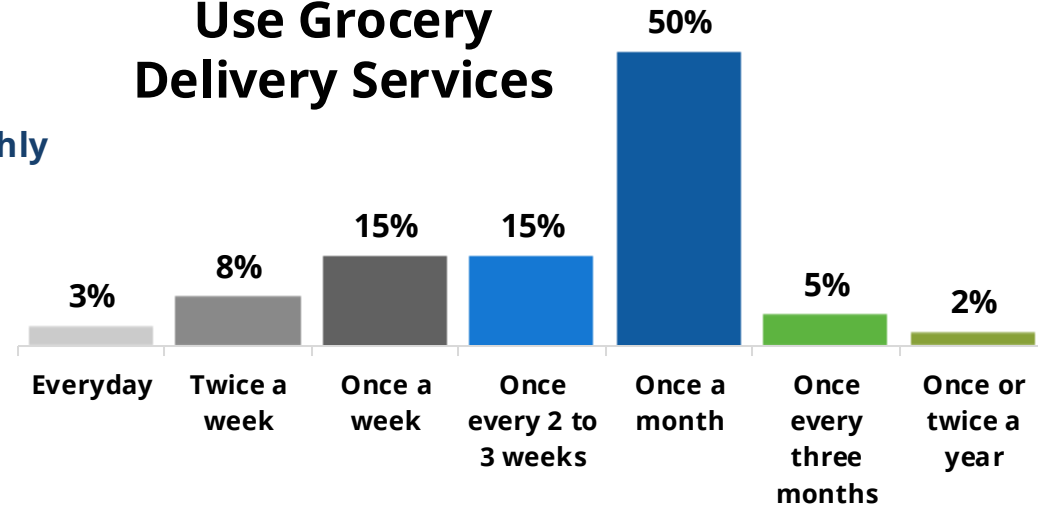
FAST FOOD: WHAT FACTORS INFLUENCE YOUR DECISION OF OUTLET



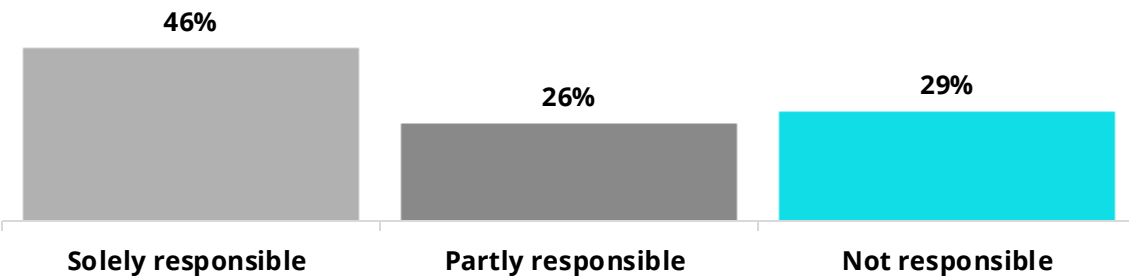


R2 110
average monthly spend on groceries.

How Often Do You Use Grocery Delivery Services

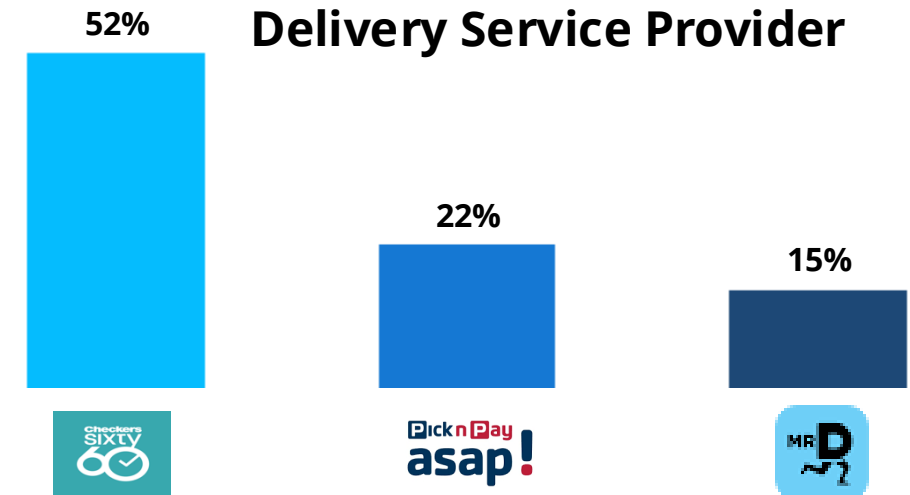


Household purchases responsibilities



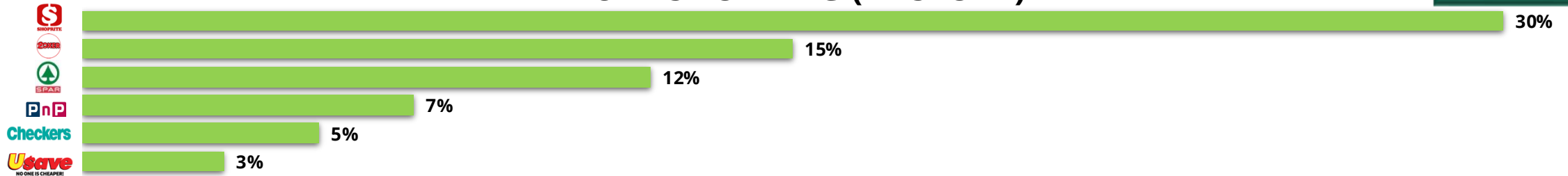
58% of the respondents usually do the grocery shopping themselves in their household.

Delivery Service Provider

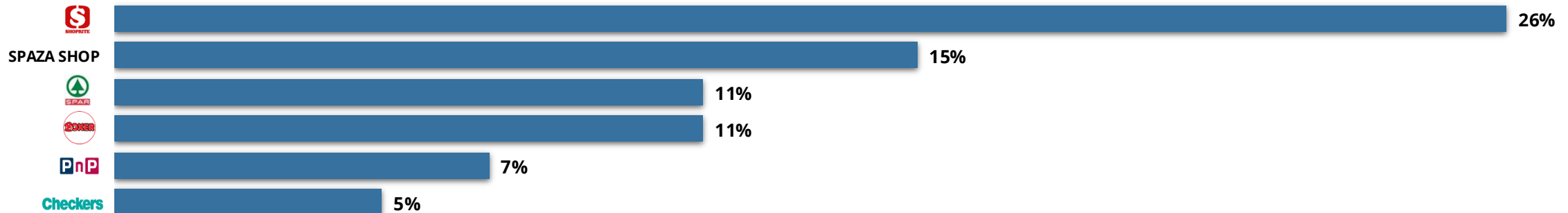


BULK SHOPPING (IN STORE)

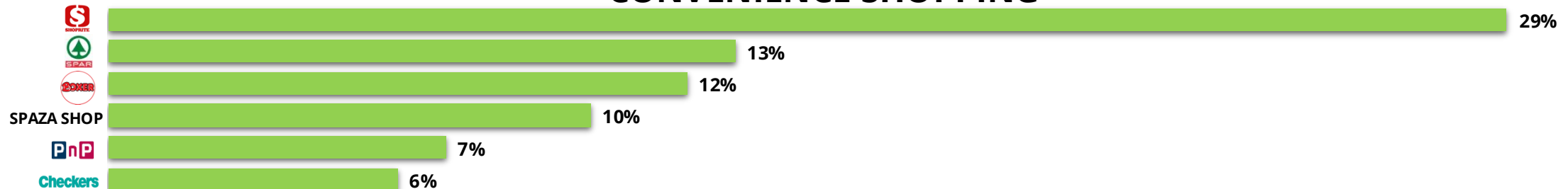
YEAR 5



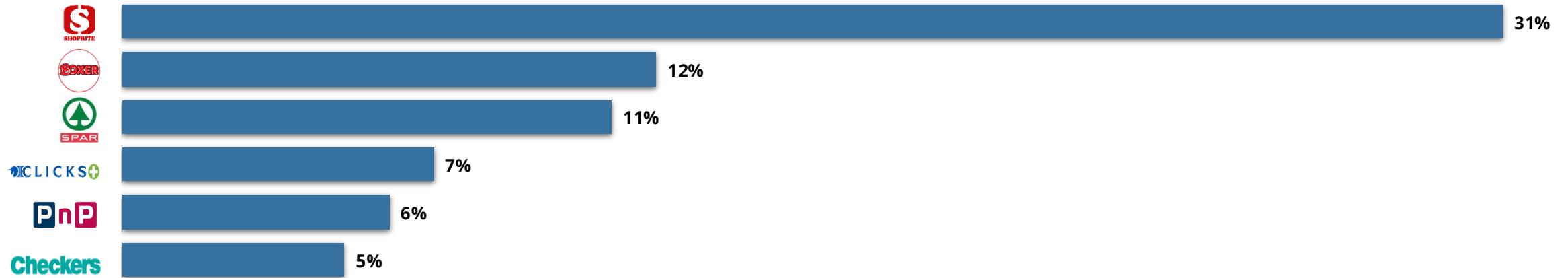
DAY TO DAY (IN STORE) GROCERIES



CONVENIENCE SHOPPING

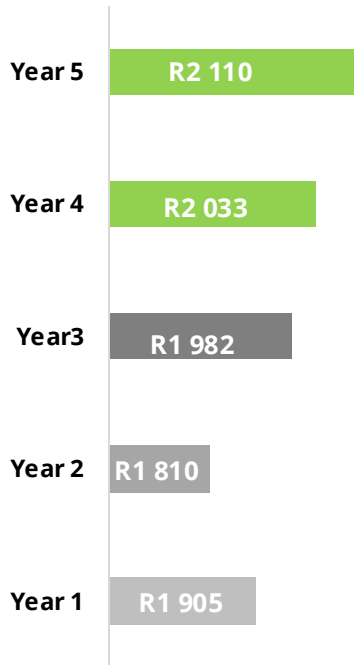


TOILETRIES (IN STORE)



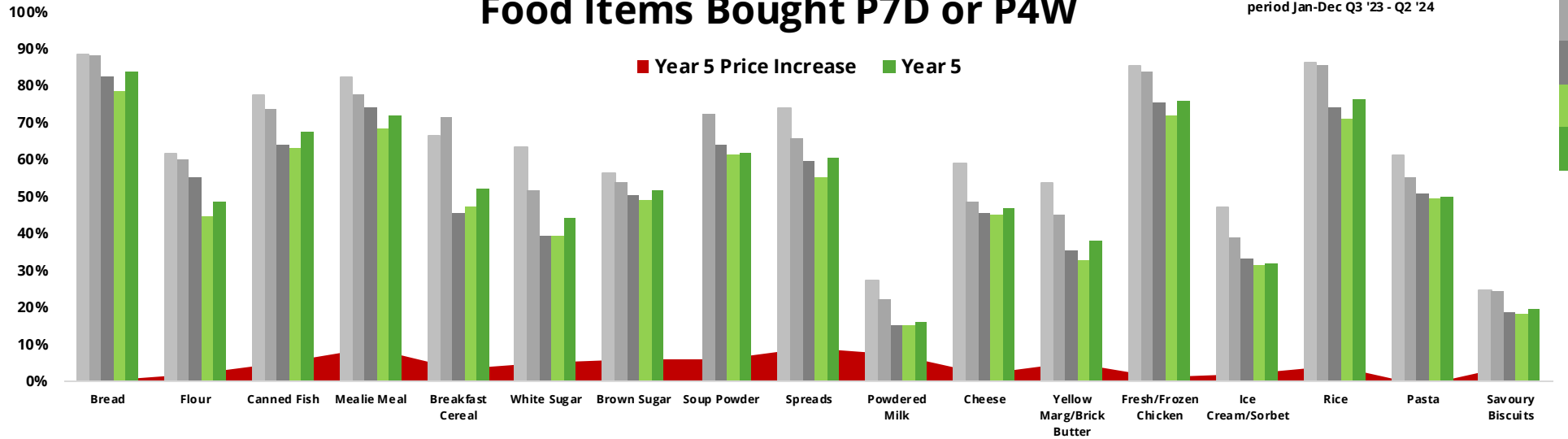
GROCERIES AVERAGE SPEND/FOOD & HOUSEHOLD ITEMS BOUGHT

Average Grocery **only** Spend



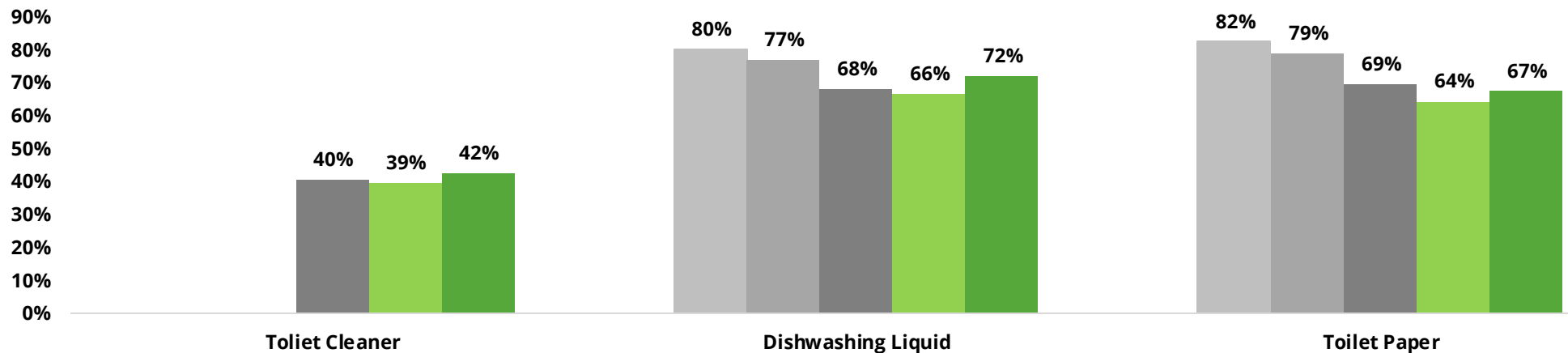
Food Items Bought P7D or P4W

Price Increases sourced from STATS SA and averaged for the period Jan-Dec Q3 '23 - Q2 '24



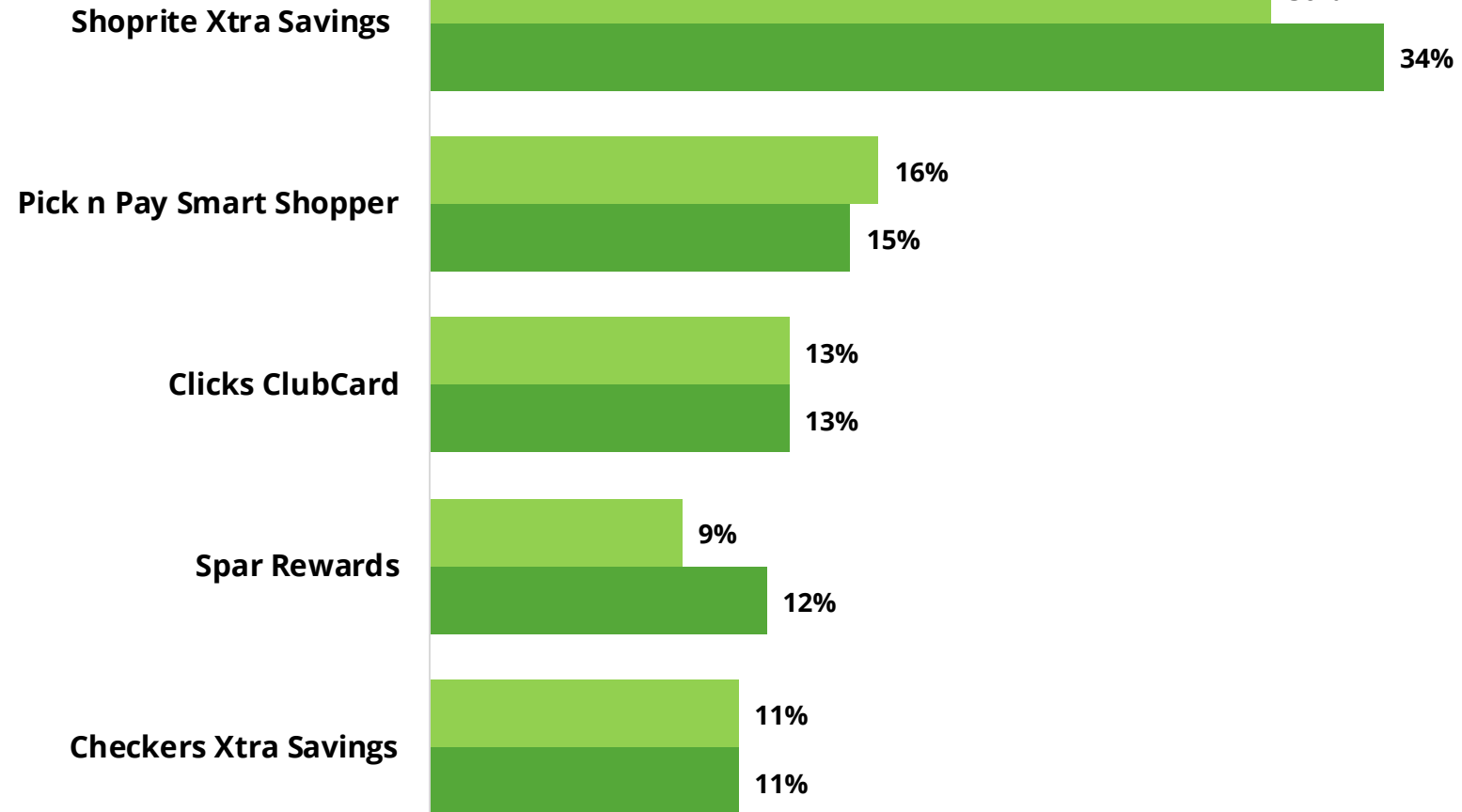
- Year 1
- Year 2
- Year 3
- Year 4
- Year 5

Household Goods Bought P4W



50% of the population have a store loyalty or rewards card

Top 5 Loyalty/Rewards Cards



Year 1
Year 2
Year 3
Year 4
Year 5



R430 average monthly spend on alcoholic beverages

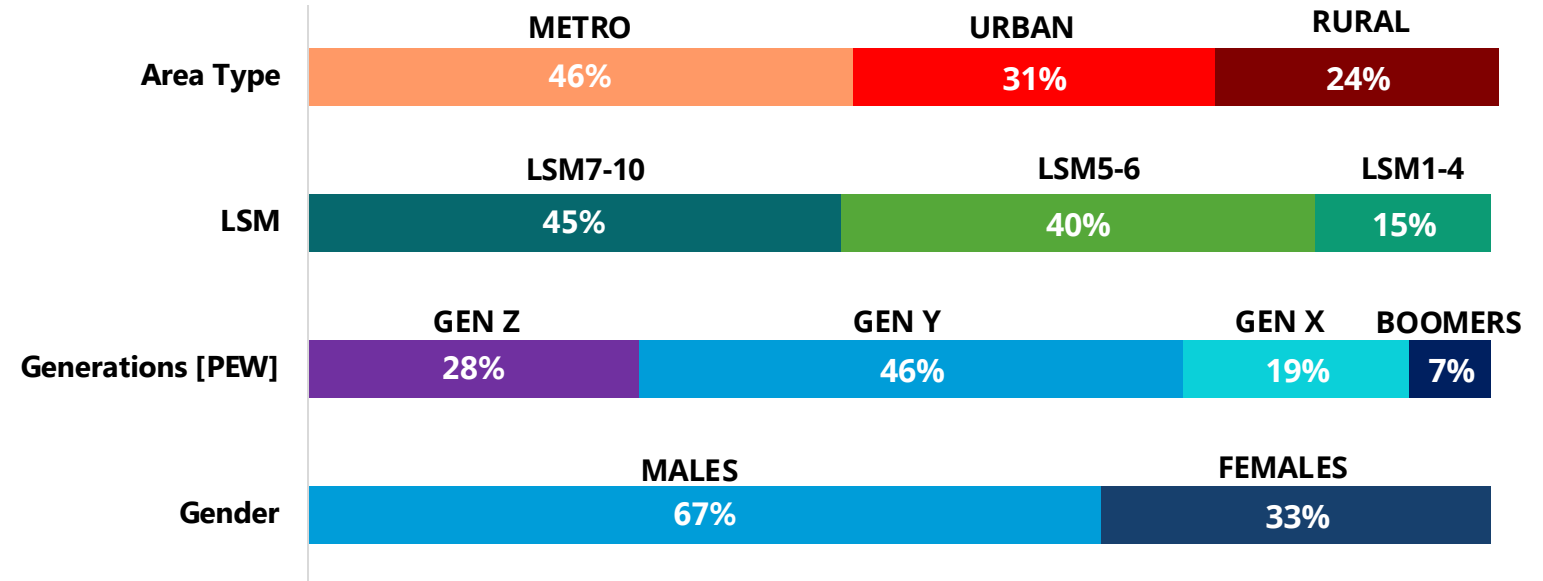


25% bought liquor in P7D

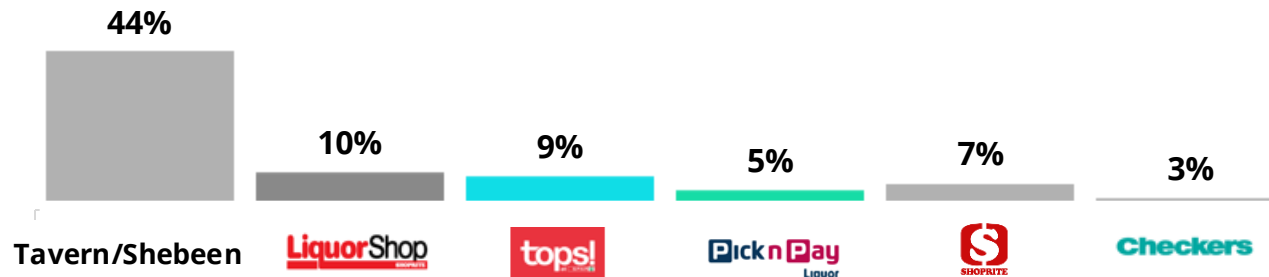


16% bought liquor in P7D from a tavern/shebeen

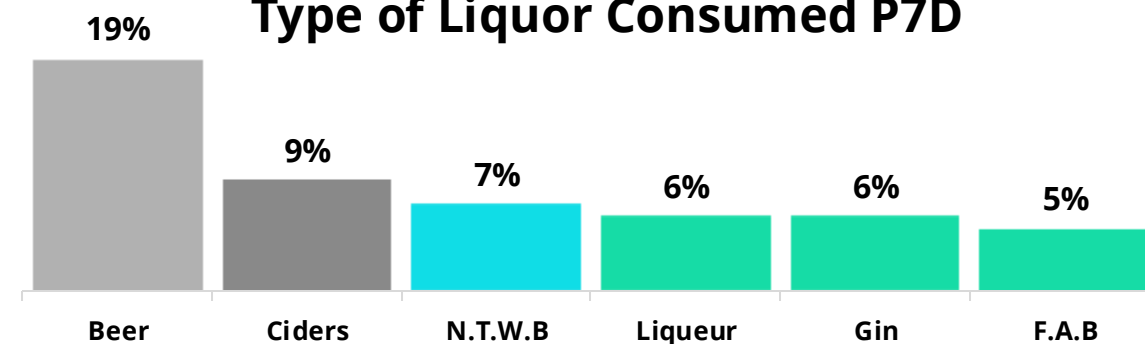
Bought Alcohol P7D Population Distribution



Top Liquor Outlets P7D



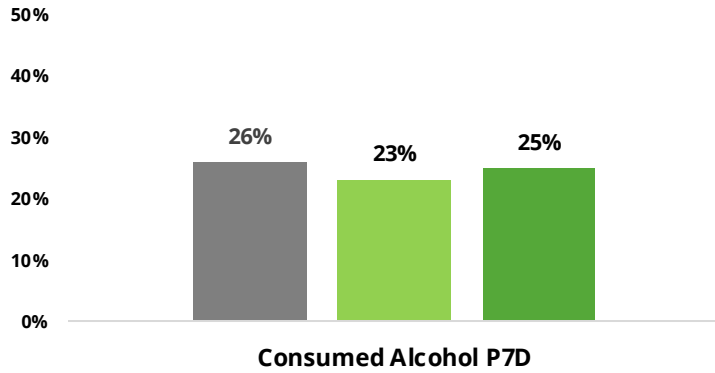
Type of Liquor Consumed P7D



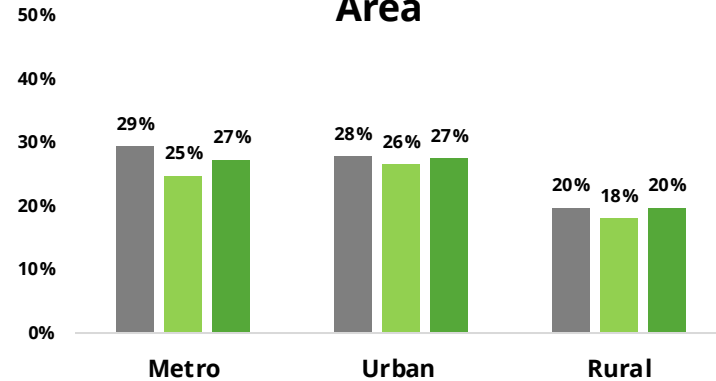
ALCOHOL CONSUMPTION PAST 7 DAYS

Year 3
Year 4
Year 5

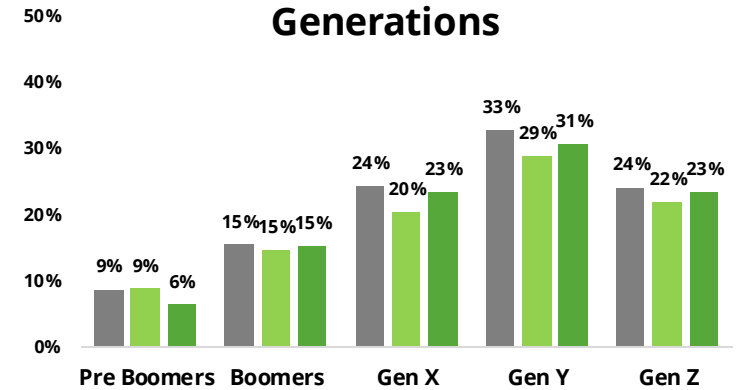
Consumed Alcohol P7D



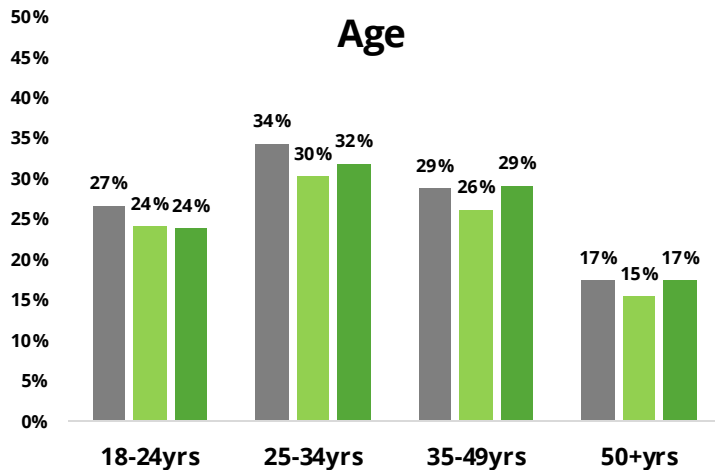
Consumed Alcohol P7D Area



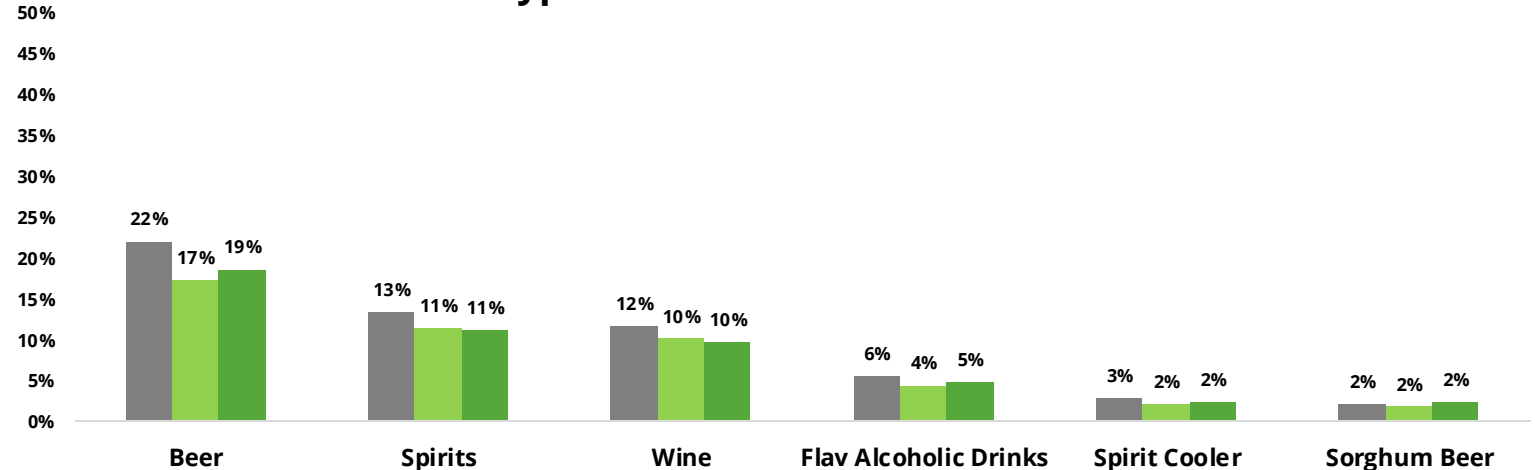
Consumed Alcohol P7D Generations



Consumed Alcohol P7D Age



Type of Alcohol Consumed P7D





R2105 average monthly spend on fuel



45% have a tracking device



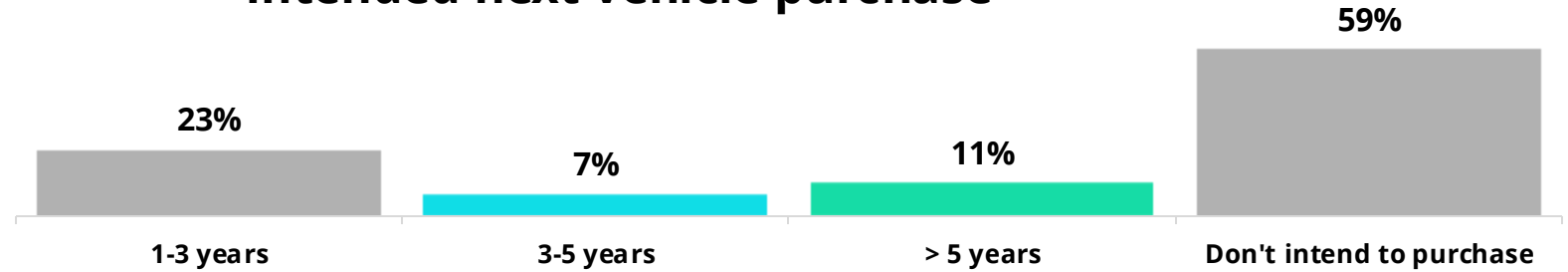
R5184 average instalment price



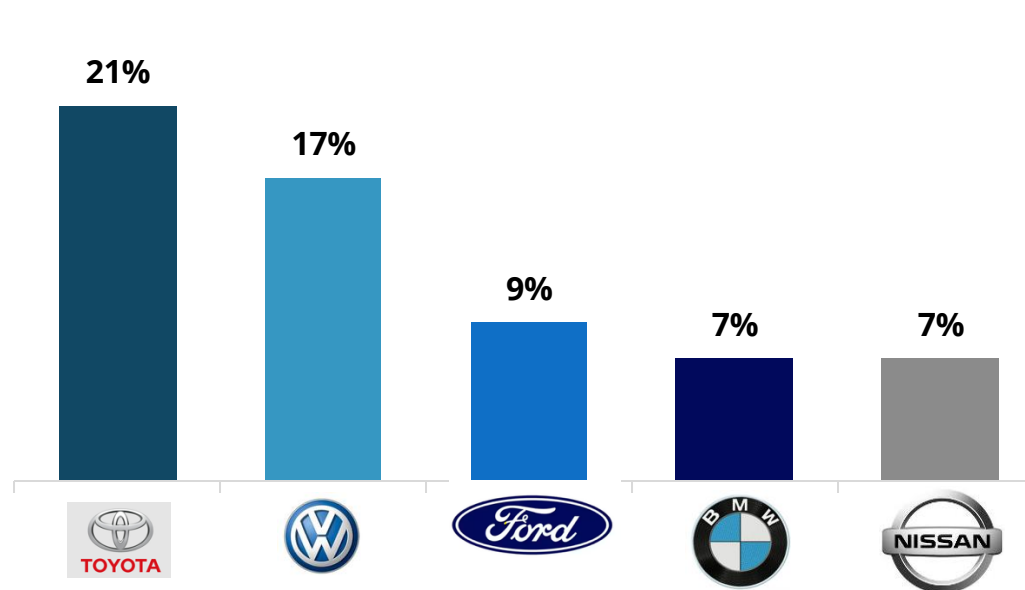
63% people purchased second-hand vehicle

43% of drivers personally own a vehicle

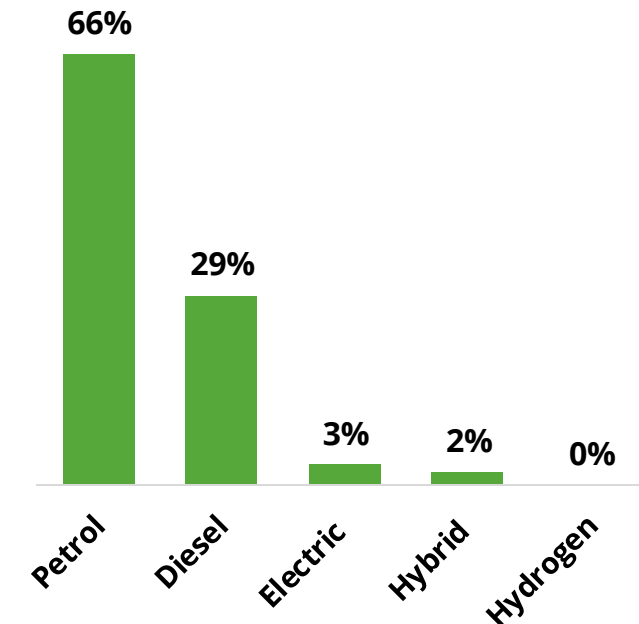
Intended next vehicle purchase



Most Common Vehicle Brands Driven



Preferred Fuel Type for Next Vehicle



Thank you.



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