



MARKETING RESEARCH
FOUNDATION

PLUS 94
RESEARCH

MAPS

MAPS DATA OVERVIEW:
Jan '21 – Dec '23



MAY

20
24

DATA COLLECTION INSTRUMENTS

- Face-to-face questionnaires consisting of 286 questions and covering 1263 non-fast moving consumer goods brands,
- Leave-behind diaries
 - Total Questions = 414
 - Behaviour questions = 112
 - Non FMCG Brands = 219
 - FMCG Questions = 302
 - FMCG Categories = 151
 - FMCG Brands = 1 868



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



Back Checking

RECORDING	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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.

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

20 040

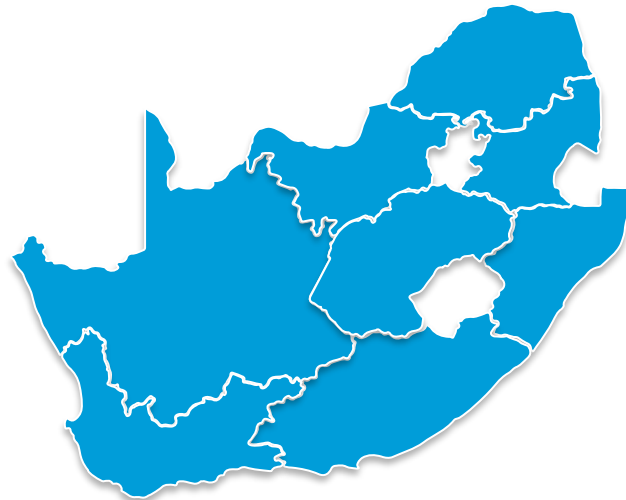
Interviews conducted per year

212

Interviewers in field

11 256

Paper and Online leave behind
questionnaire completed per
year



Sample Distribution



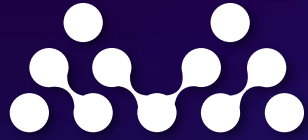
50%
METRO



30%
URBAN



20%
RURAL



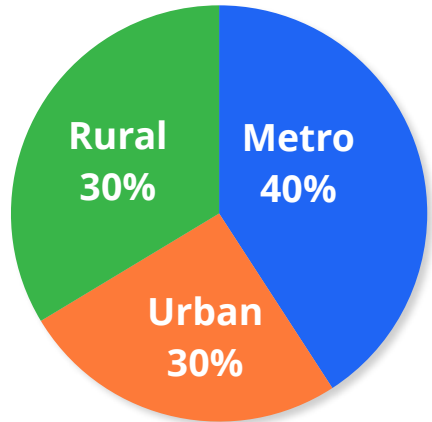
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Demographics

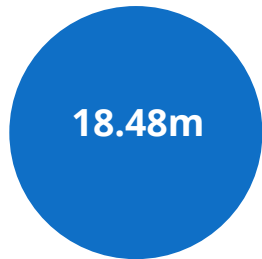


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Area Distribution



Households



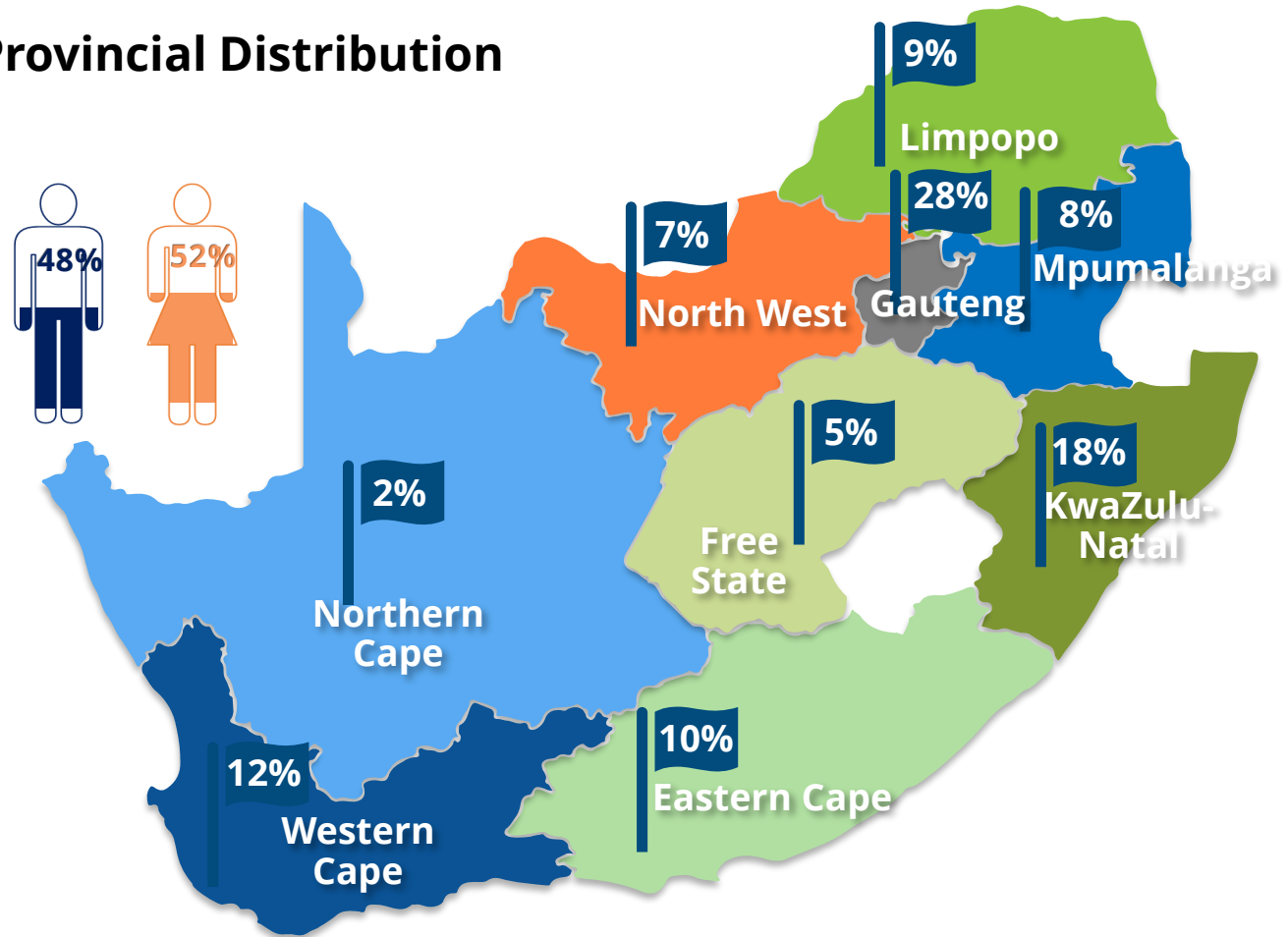
People per household



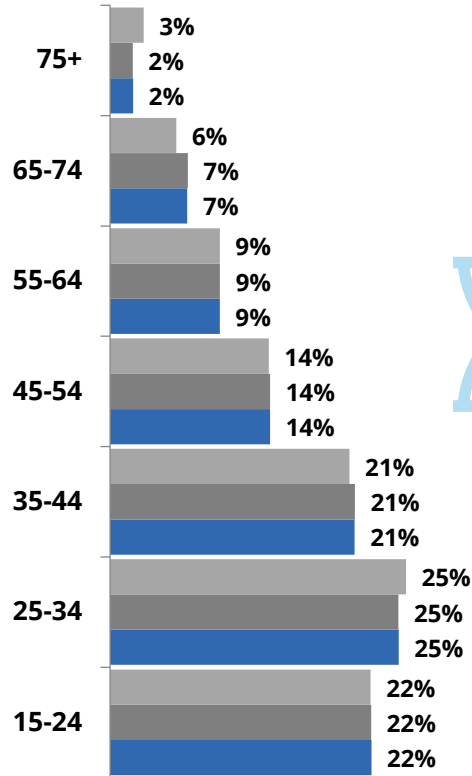
Dependants per household



Provincial Distribution



Age Groups

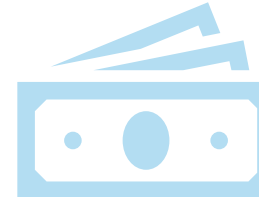
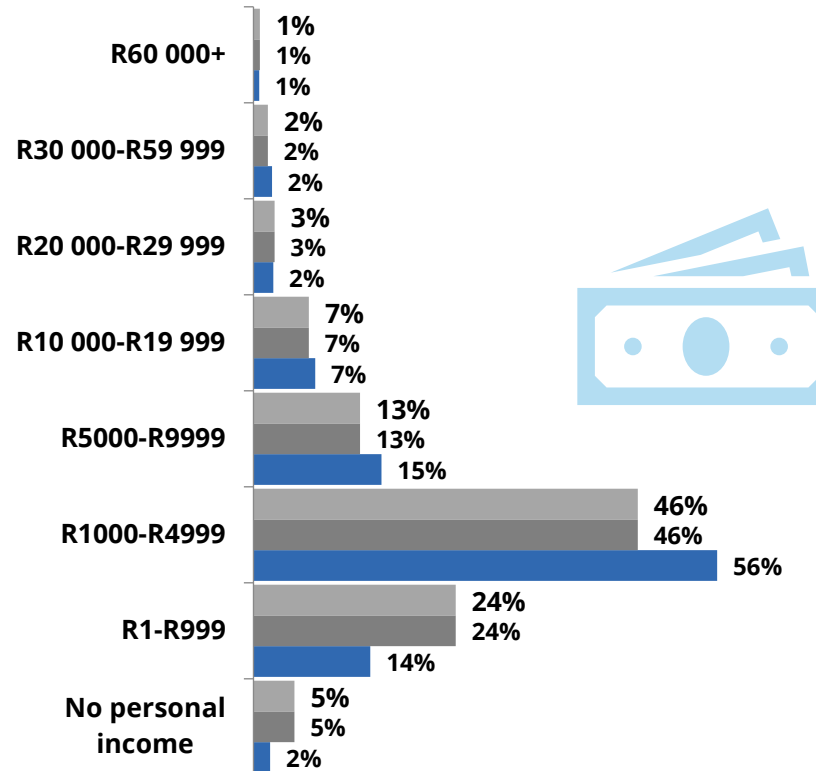


Average age: 38

Average age: 38

Average age: 38

Personal Income

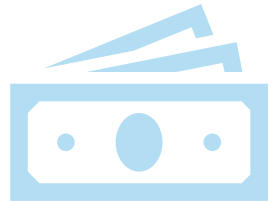
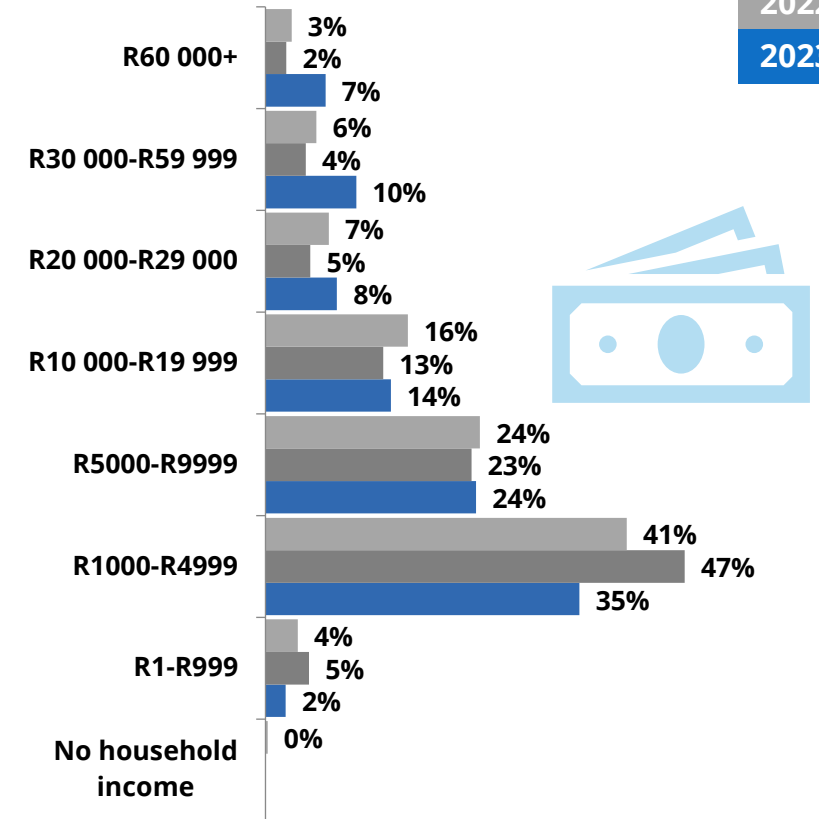


Average Income: R5 103

Average Income: R4 671

Average Income: R5 822

Household Income



Average Income: R12 044

Average Income: R10 349

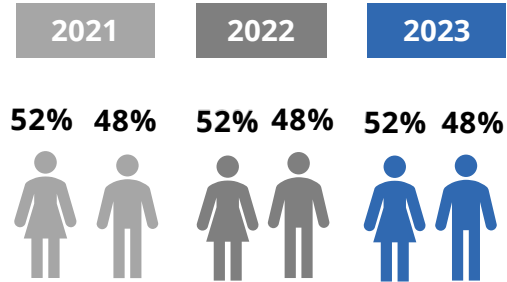
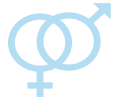
Average Income: R18 102

2021

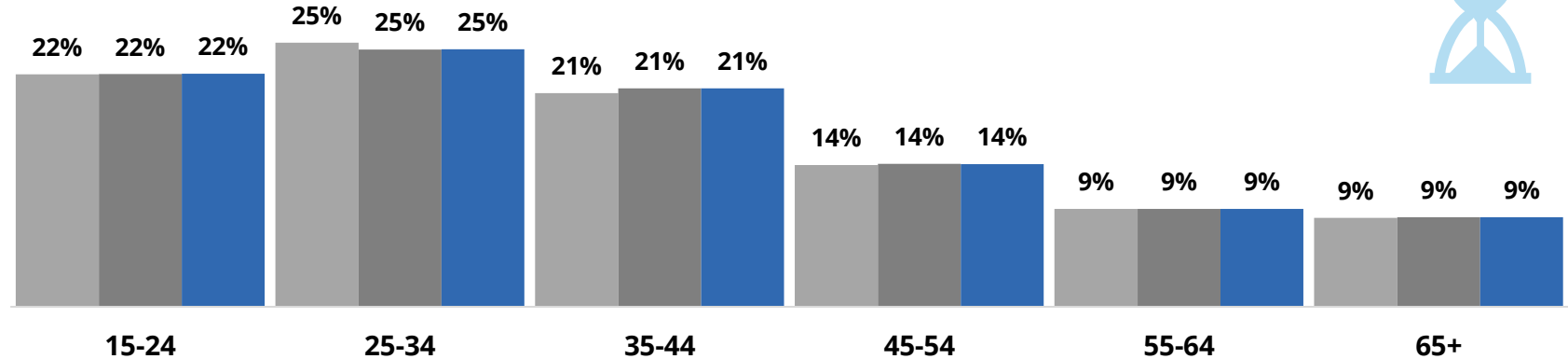
2022

2023

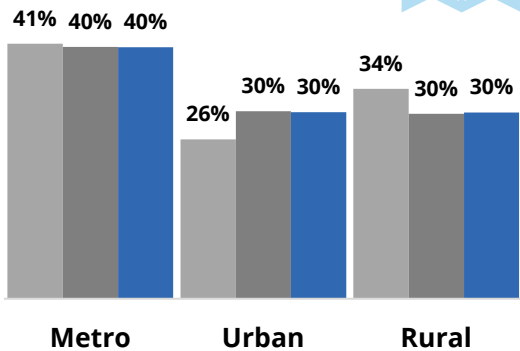
Gender



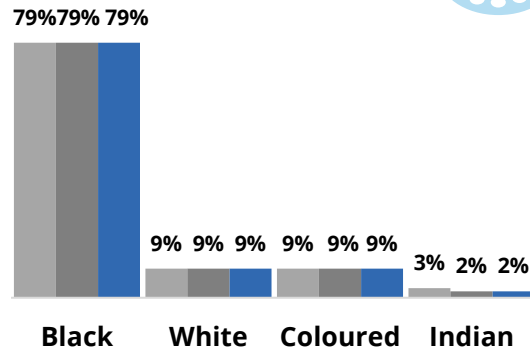
Age Groups



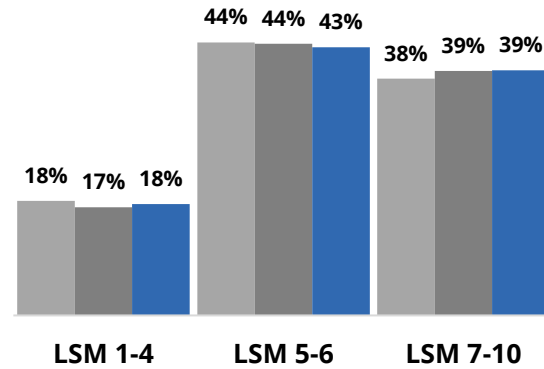
Area



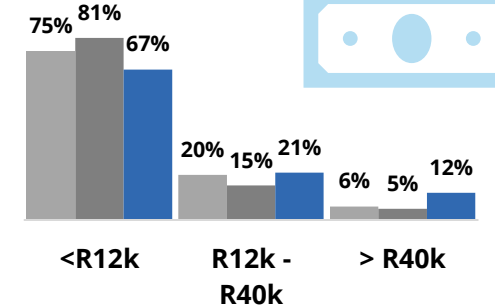
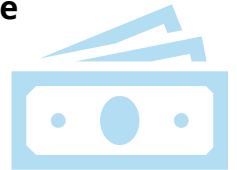
Race

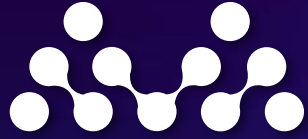


LSM



Monthly Household Income





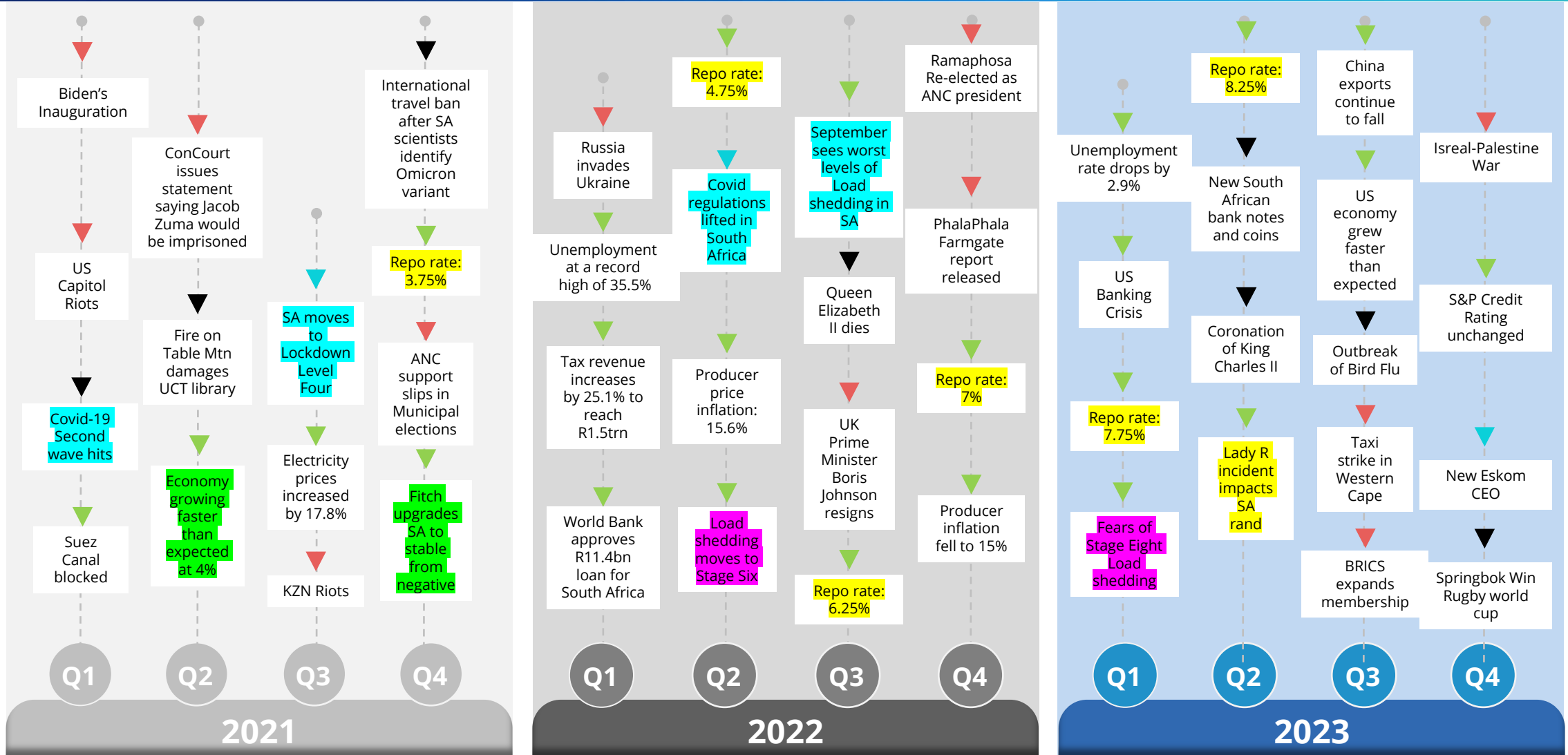
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Economic Landscape



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TIMELINE: MAJOR EVENTS



Source: Eighty20 Credit Stress Report 2023 Q3

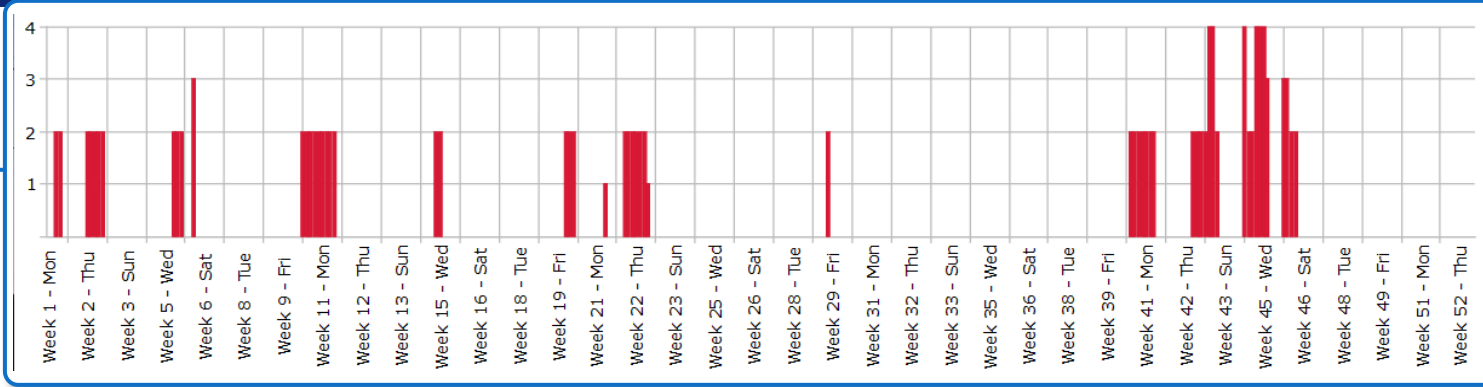
ELECTRICITY BLACKOUTS

Nielsen Loadshedding Dashboard (Source: BRC SA)



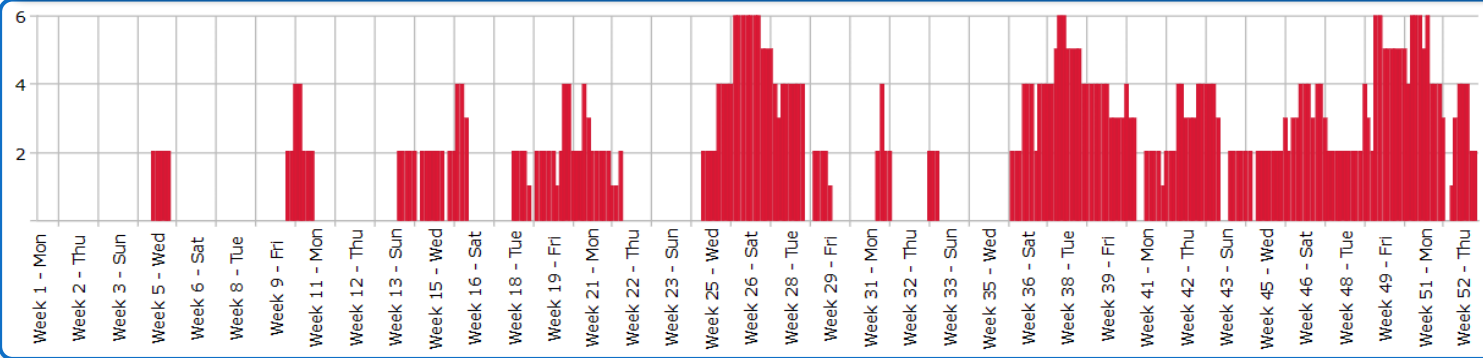
2021
2022
2023

2021



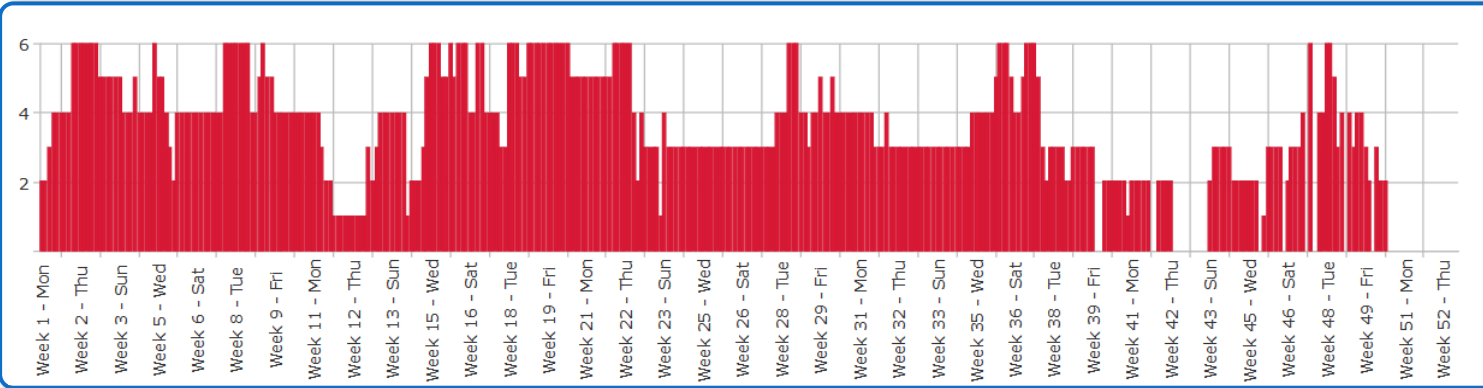
⚠ Stage 0-4

2022



⚠ Stage 0-6

2023



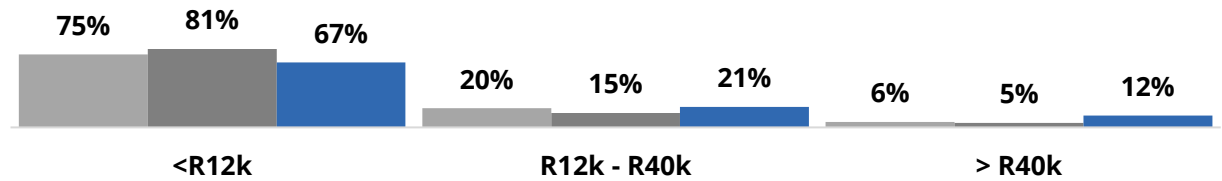
⚠ Stage 0-6

South African Inflation Rate

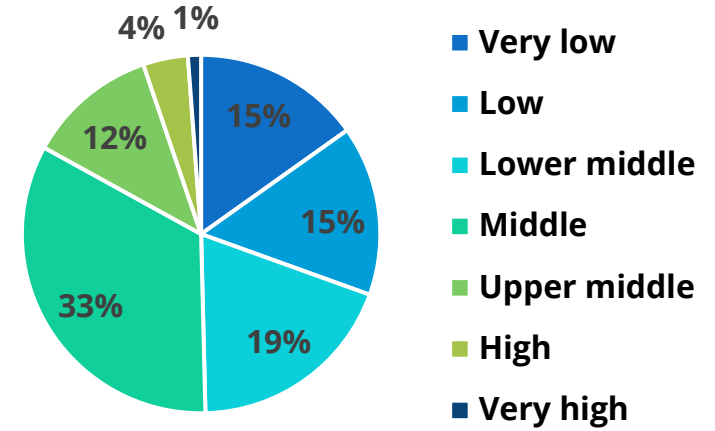


Source: Trading Economics.com

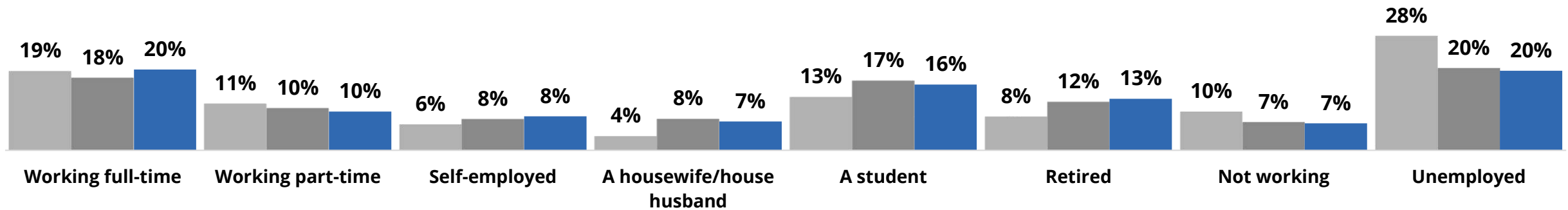
Monthly Household Income



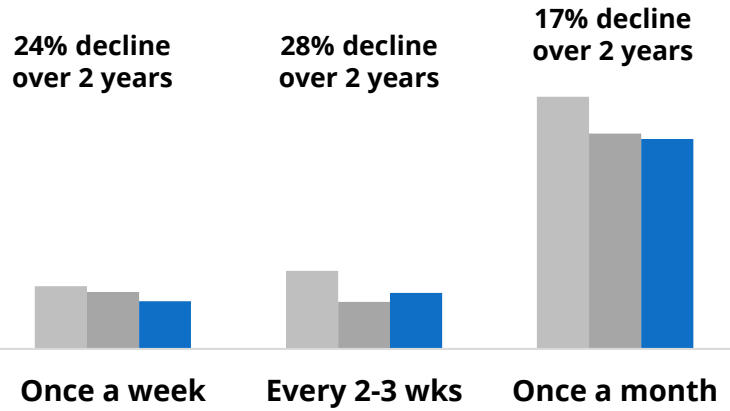
Which socio-economic class or group would you associate yourself with?



Working Status

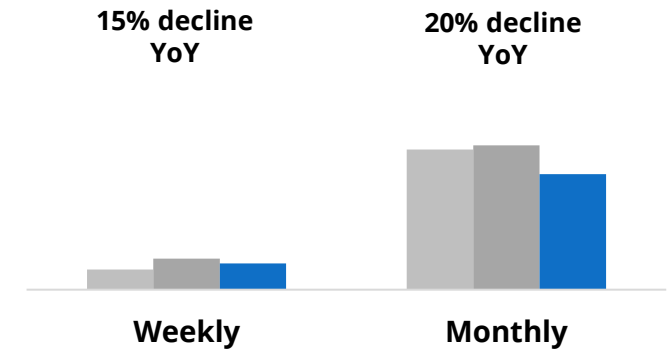


Fast Food – How Often

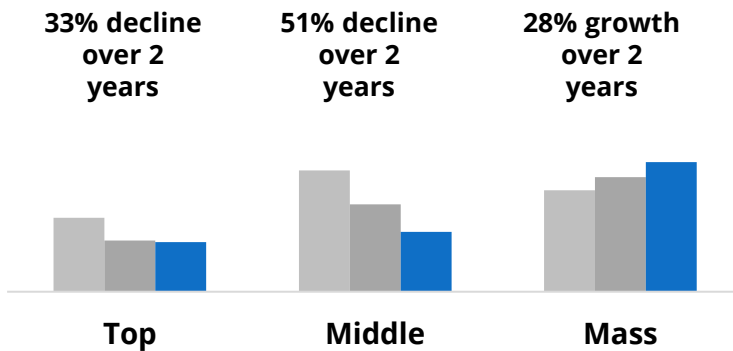


Frequency of consuming Fast Food and Eating Out have declined over a two year period

Eat Out- How Often

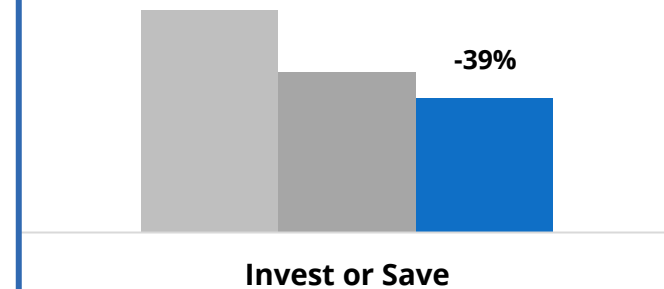


DStv Subscription



The cheaper DStv packages now make up the bulk of their subscriber base, indicating that price has become an issue with their Top and Middle tier customers

Save or Invest



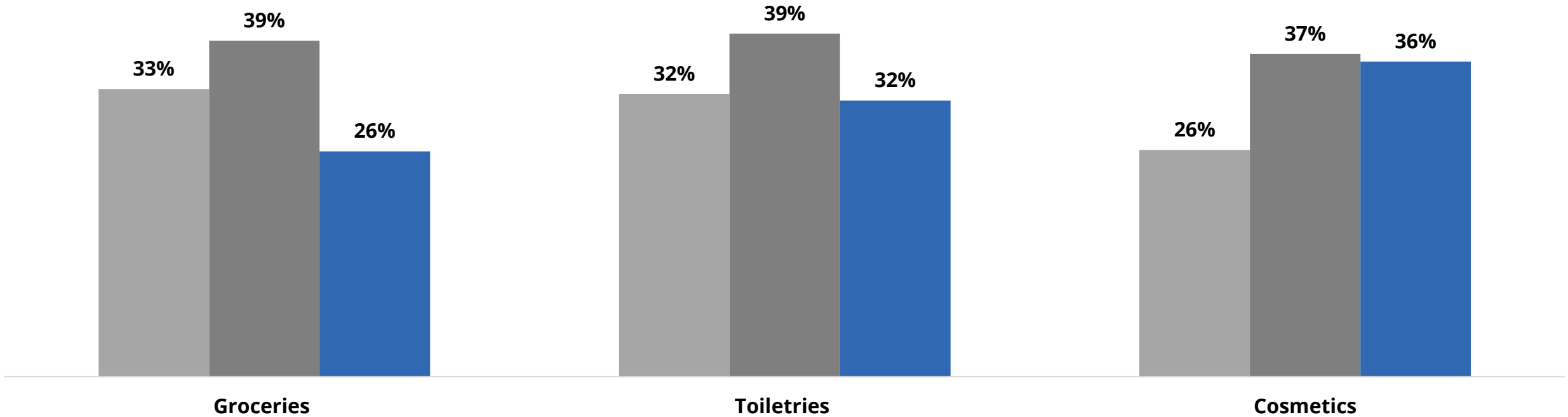
Overall decline of 39% over 2 years implies that South Africans have less disposable income available to save or invest

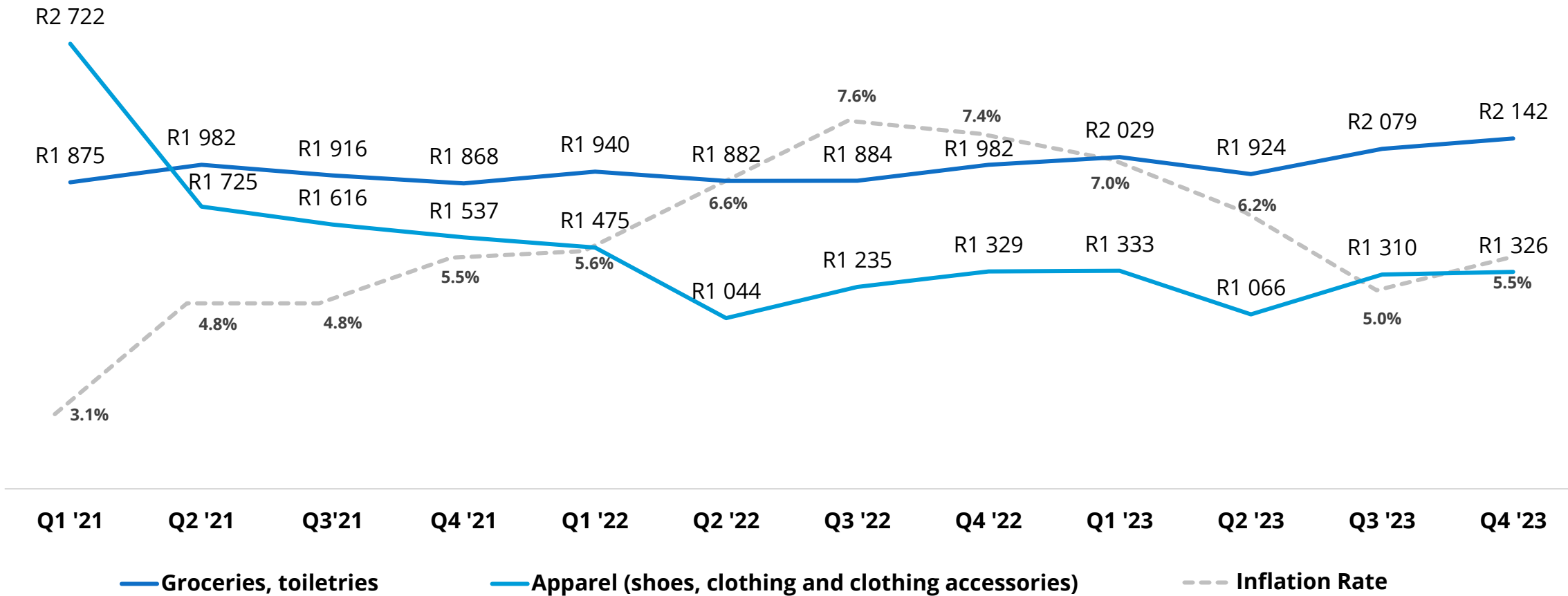
2021

2022

2023

Do you always buy the same brands?



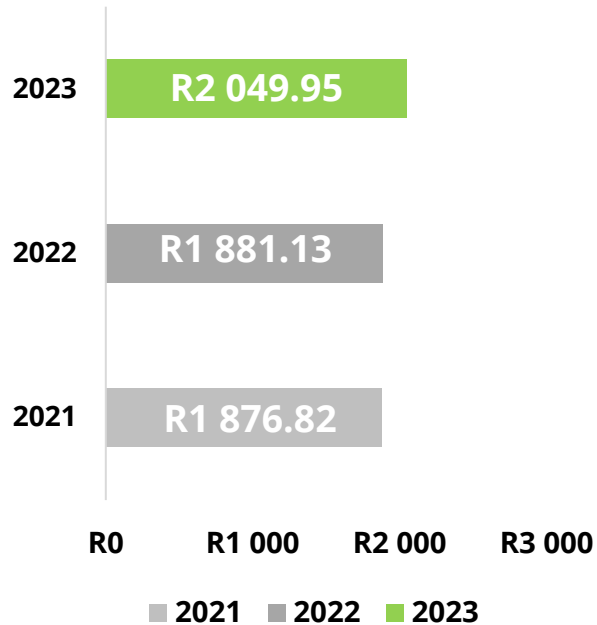


*CPI Inflation rate figures provided by StatsSA (January 2024)

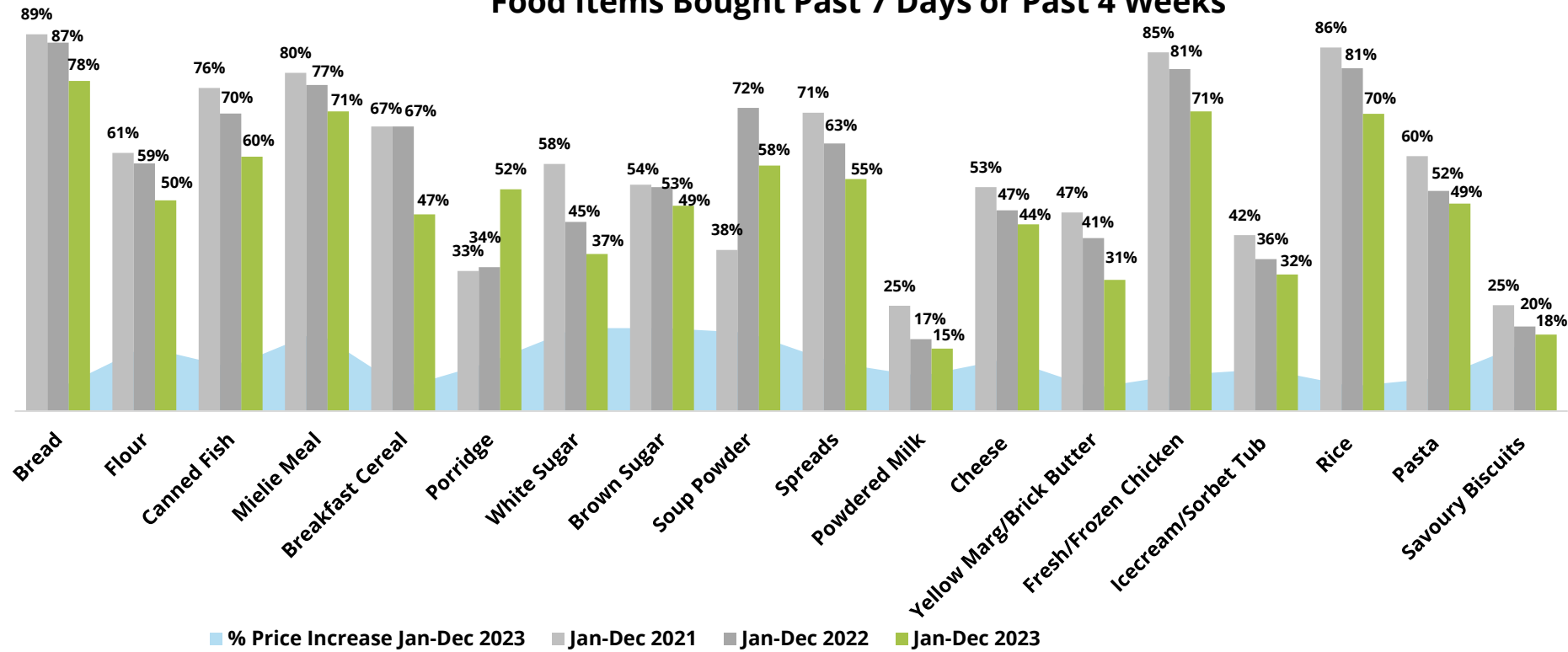
Average spend on groceries has increased year on year driven by price increases across the majority of products in a typical monthly basket of goods.

The average basket of basic good is getting smaller. Decline in consumption across majority of categories suggests that South Africans are paying more for goods in their baskets each month. The basket is getting smaller – driven by price

Average Amount Spent on Groceries per Month

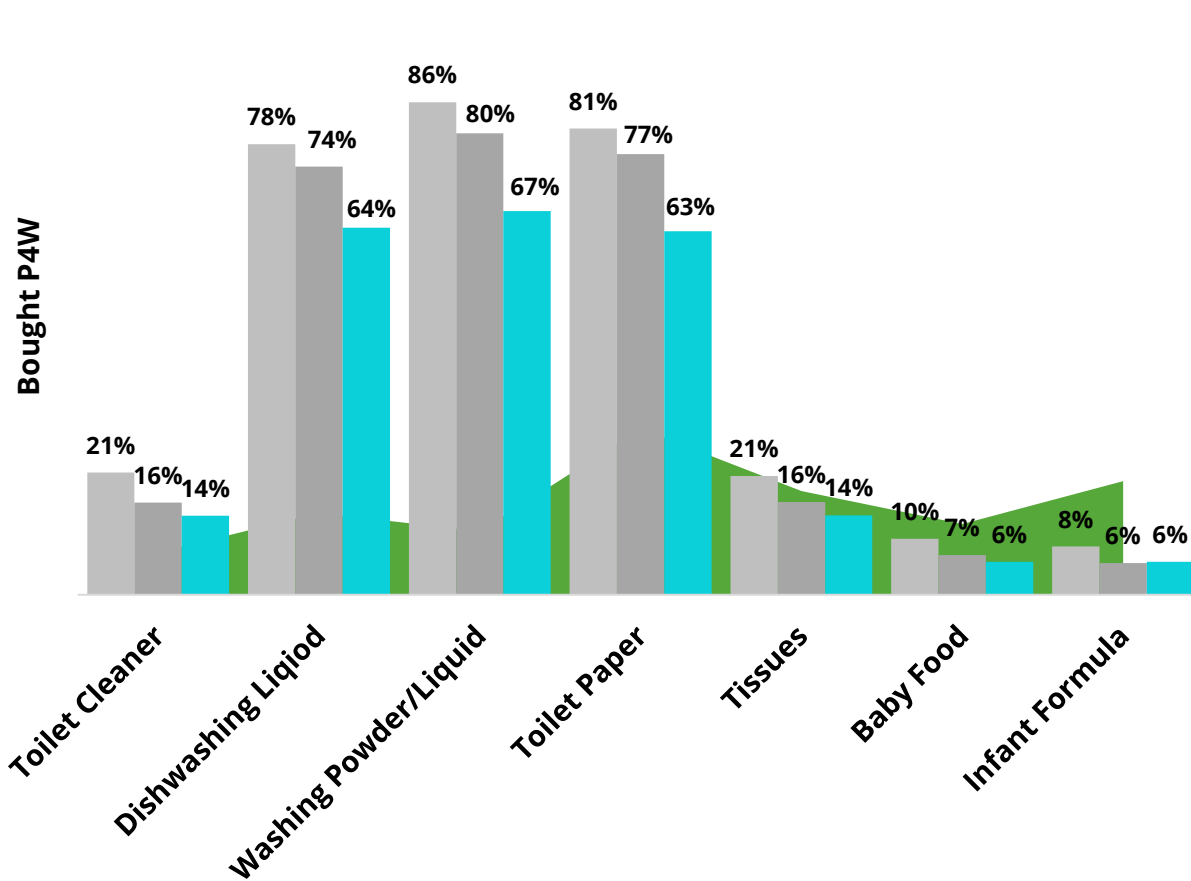


Food Items Bought Past 7 Days or Past 4 Weeks

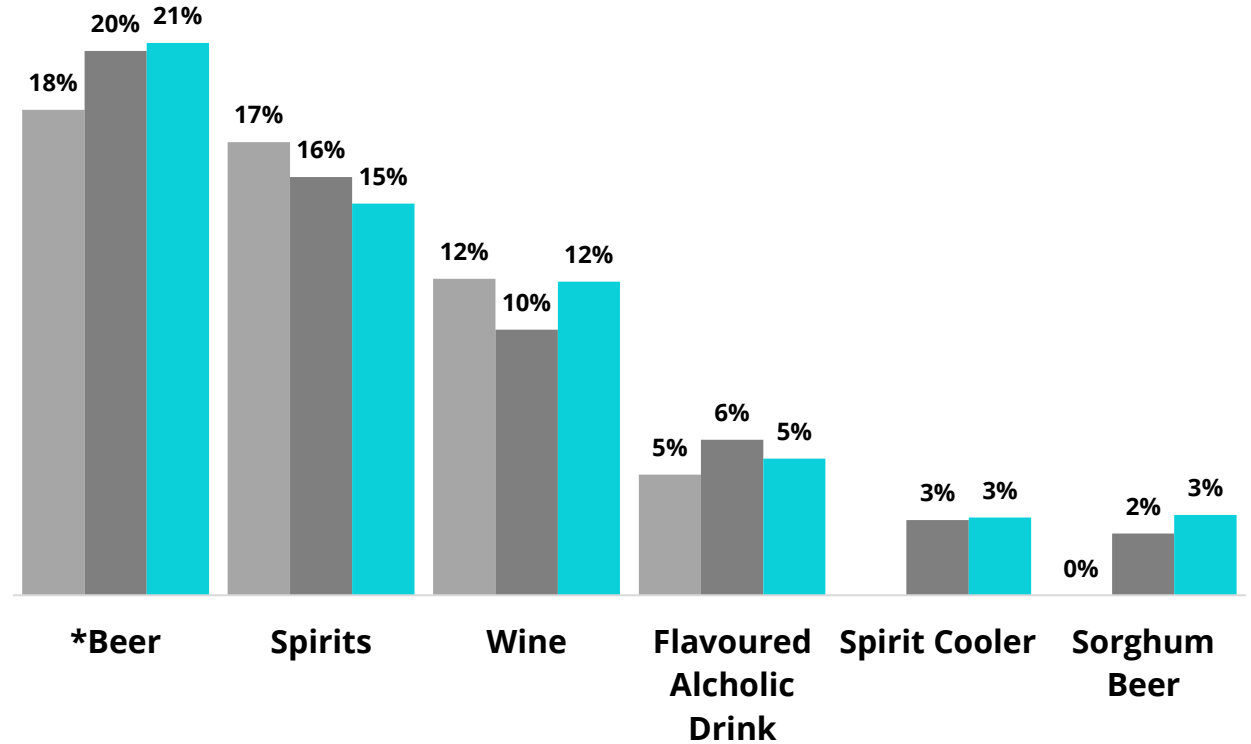


Household Goods Bought Past 4 Weeks

■ % Price Increase Jan-Dec 2023

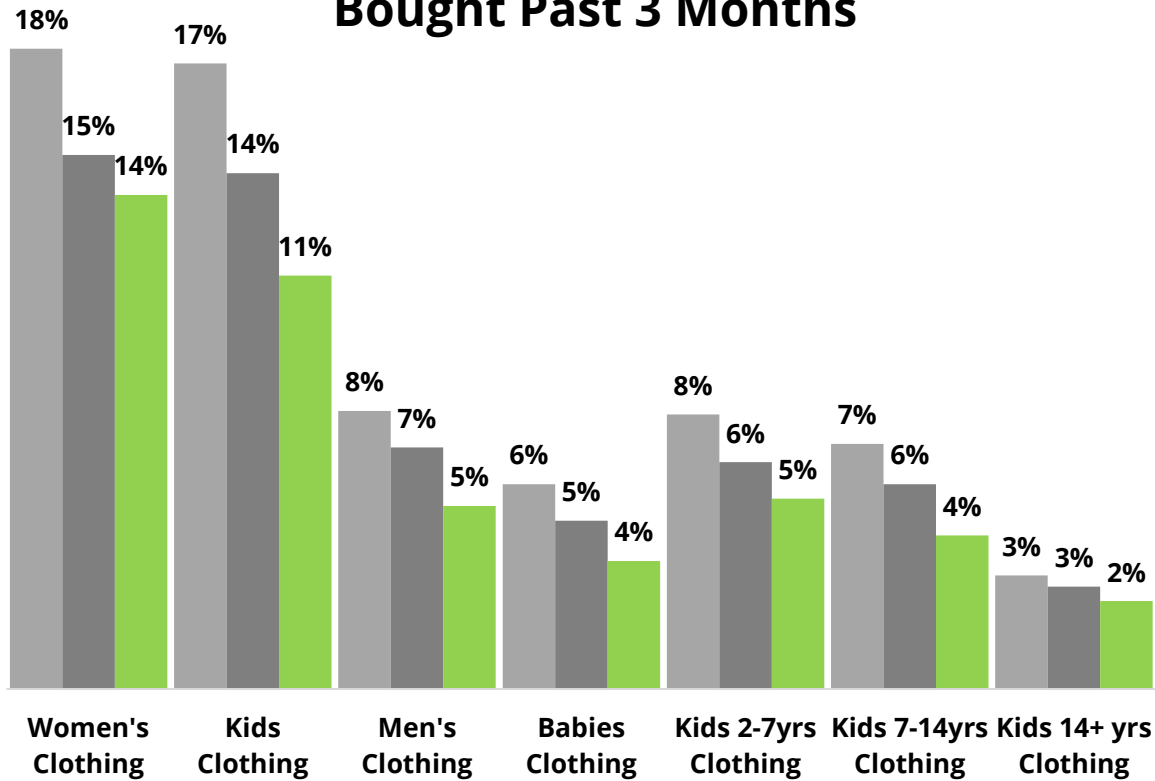


Alcohol Consumed Past 7 Days

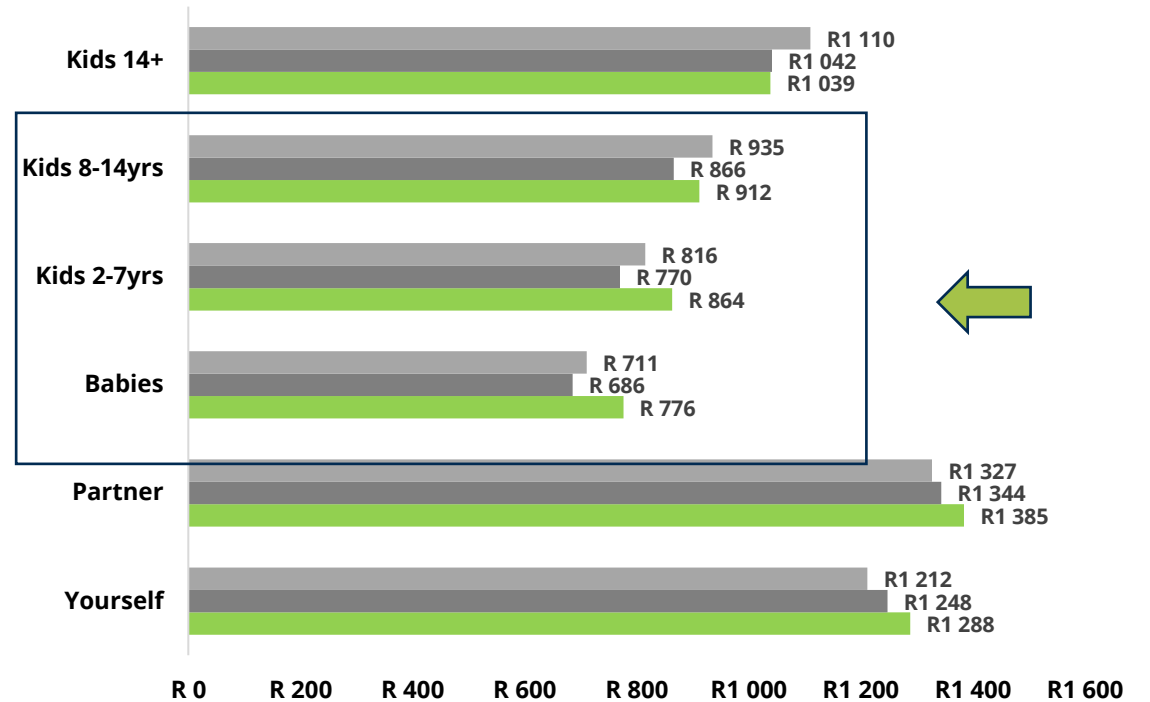


*Traditional beer not included

Bought Past 3 Months



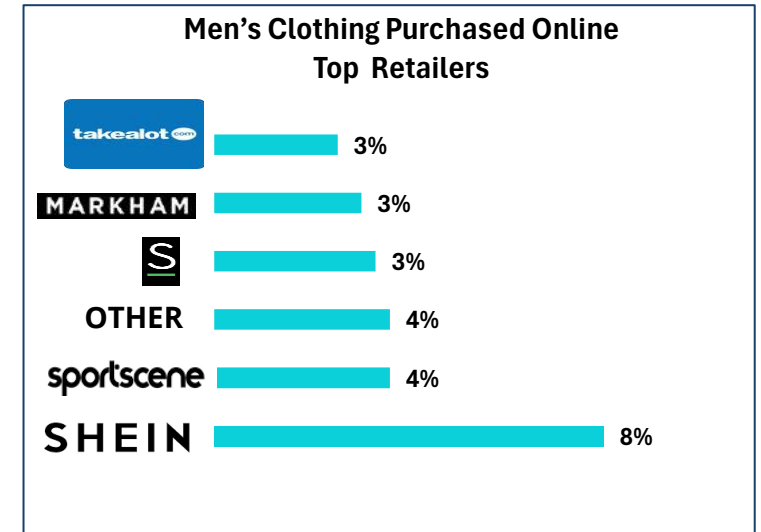
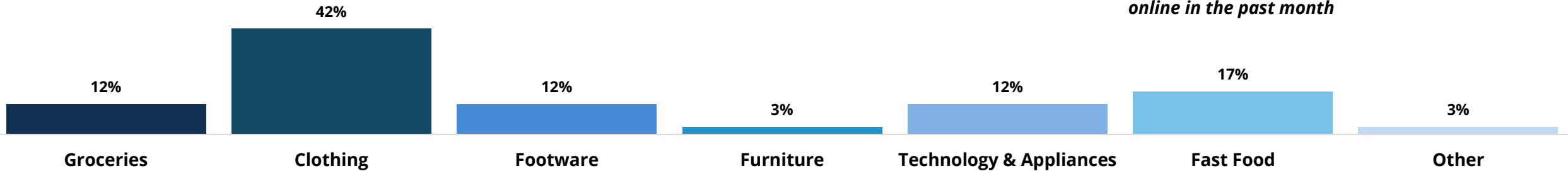
Average Amount Spent on Clothing

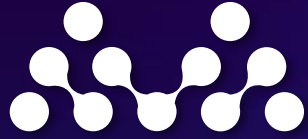


Within online clothing purchasing SHEIN is the retailer of choice

Online Shopping: Purchased P4W

1,9m people purchased clothing online in the past month





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Media Landscape



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9.6M people spend **more than 20 hours** per week watching TV.

TOP 4 TV Channels Viewership

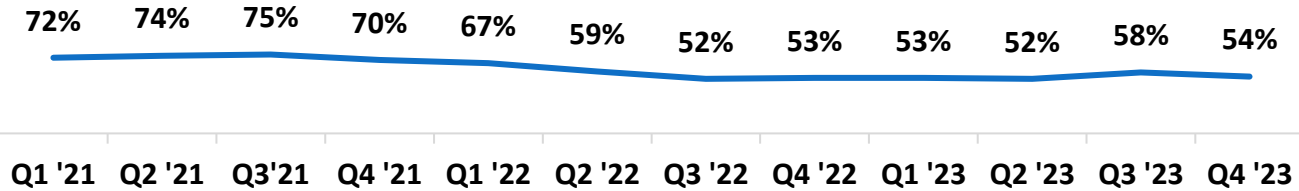
SABC 1 **10.5M** Watched P7D

e **8.6M** Watched P7D

SABC 2 **6.6M** Watched P7D

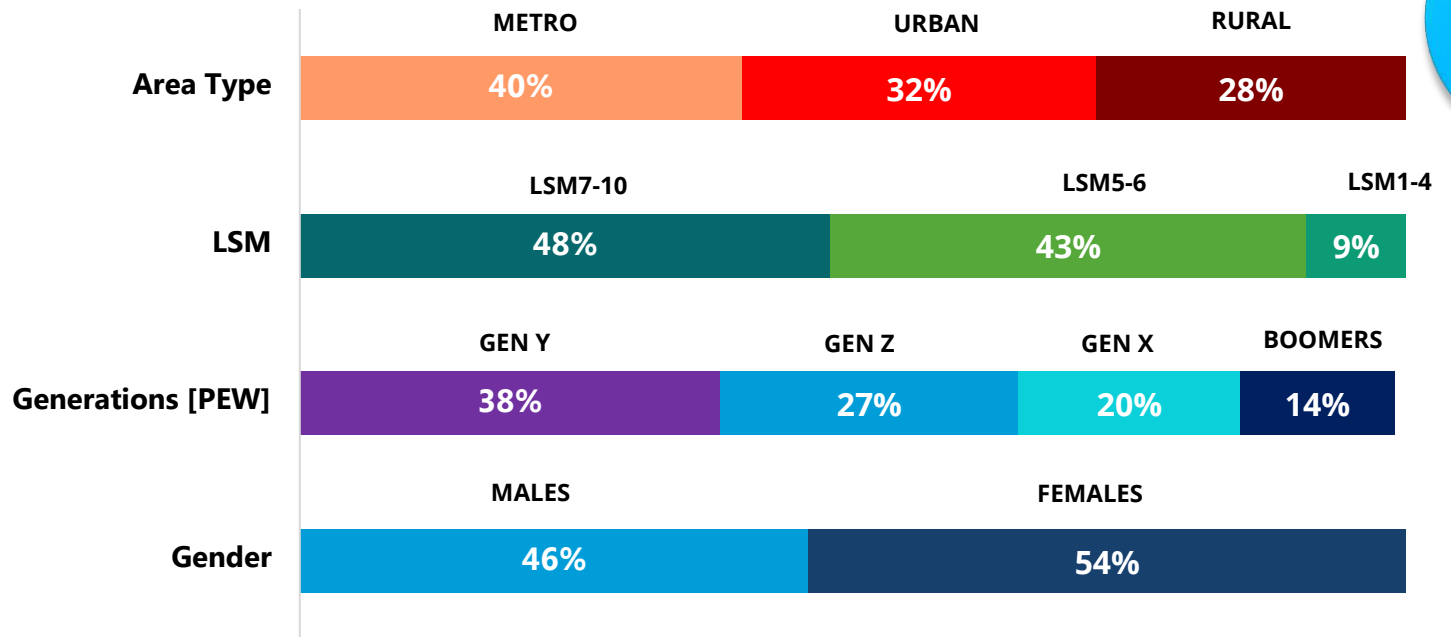
SABC 3 **5.2M** Watched P7D

Watched TV*P7D



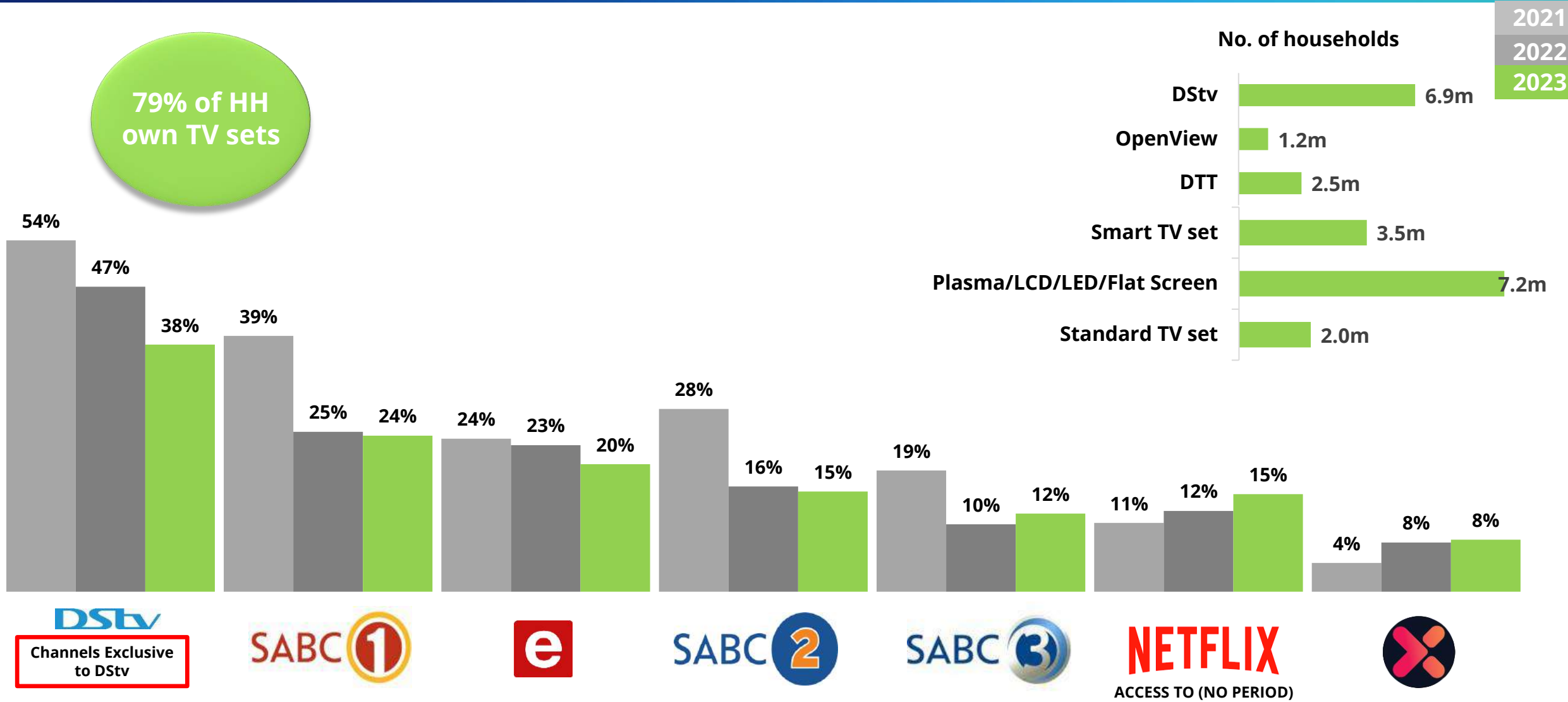
Television (P7D) Penetration **54%**

DSTV (P7D) Penetration **38%**



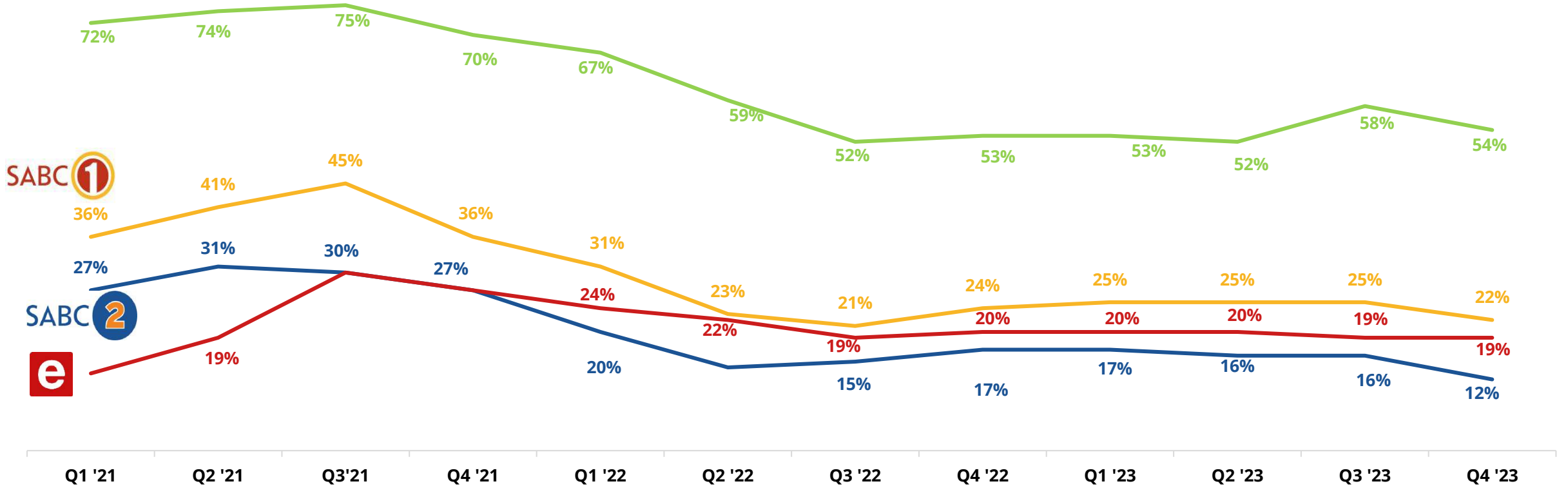
TV Penetration* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on N = 23 515 667

79% of HH own TV sets



TV Channel Audience P7D

Total TV



8.0M people have access to on-demand streaming services.

Top 3 Streaming services



Access to YouTube
10.9M

NETFLIX

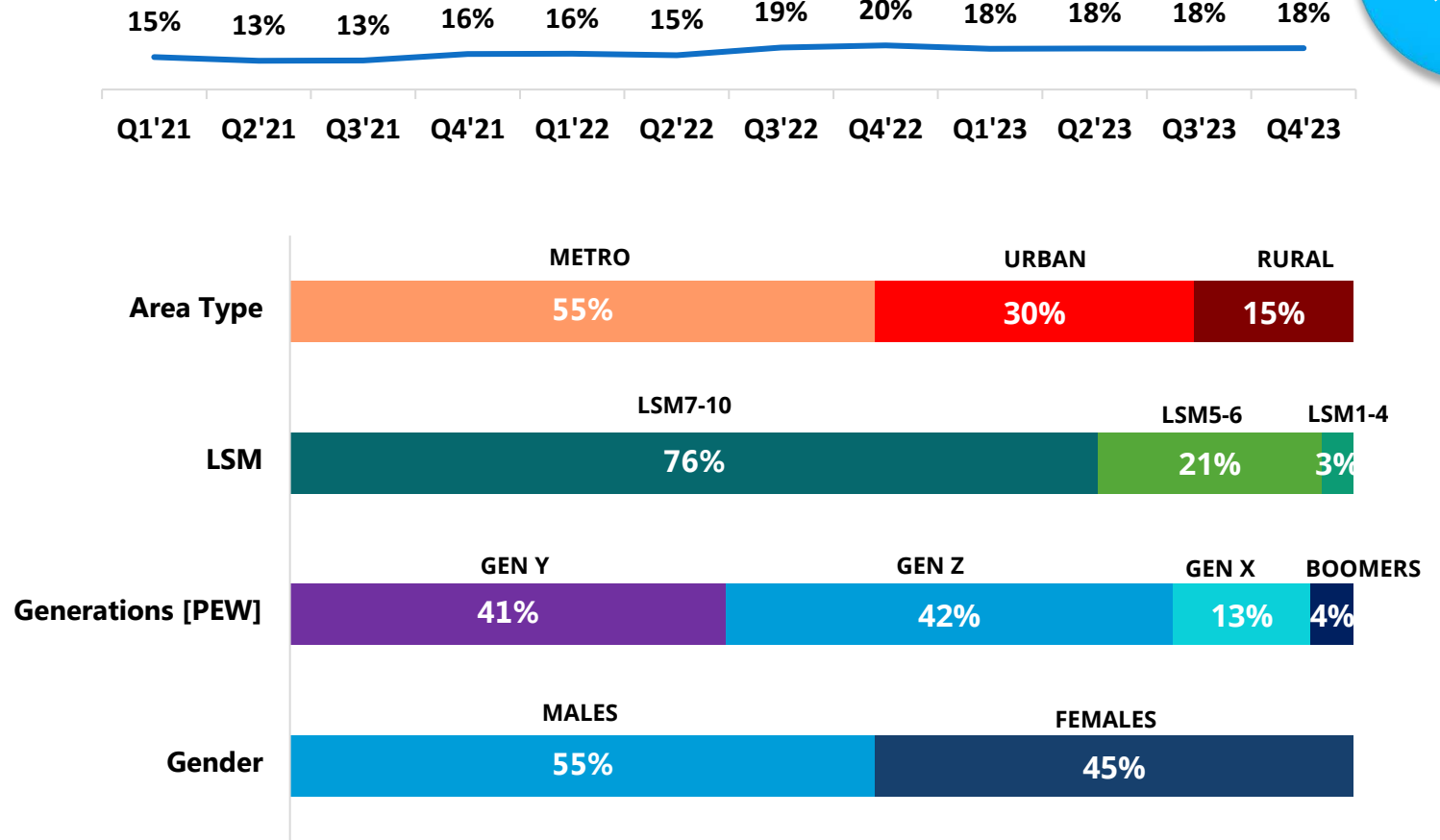
Access to Netflix
6.3M



Access to Showmax
3.6M

On-demand streaming

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.

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



has a global potential ad reach of 1.218 billion users aged 18 and above.

Out of 4.95 billion active social media users, 24.65% use TikTok.

6M South Africans used TikTok as a search engine.

P4W: TOP 3 SOCIAL MEDIA PLATFORMS



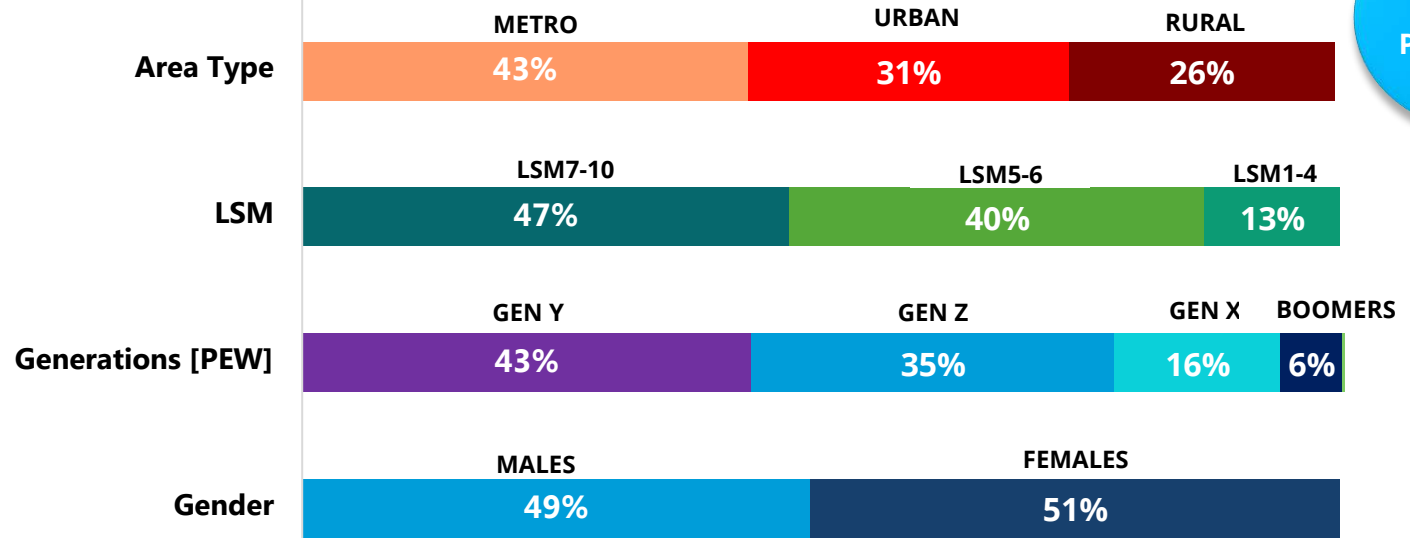
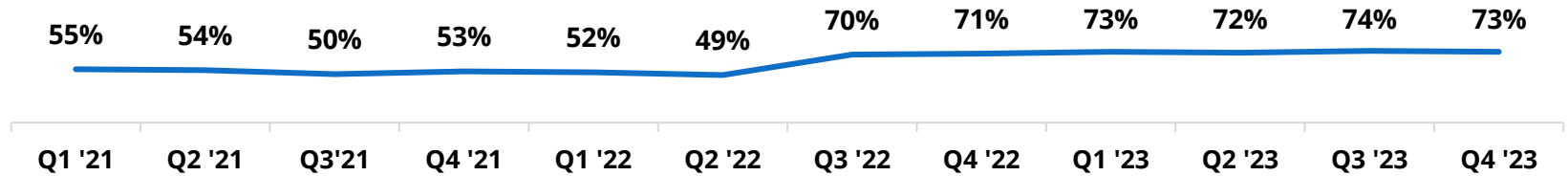
28M

facebook **25M**



TikTok 11M

Social Media* P4W

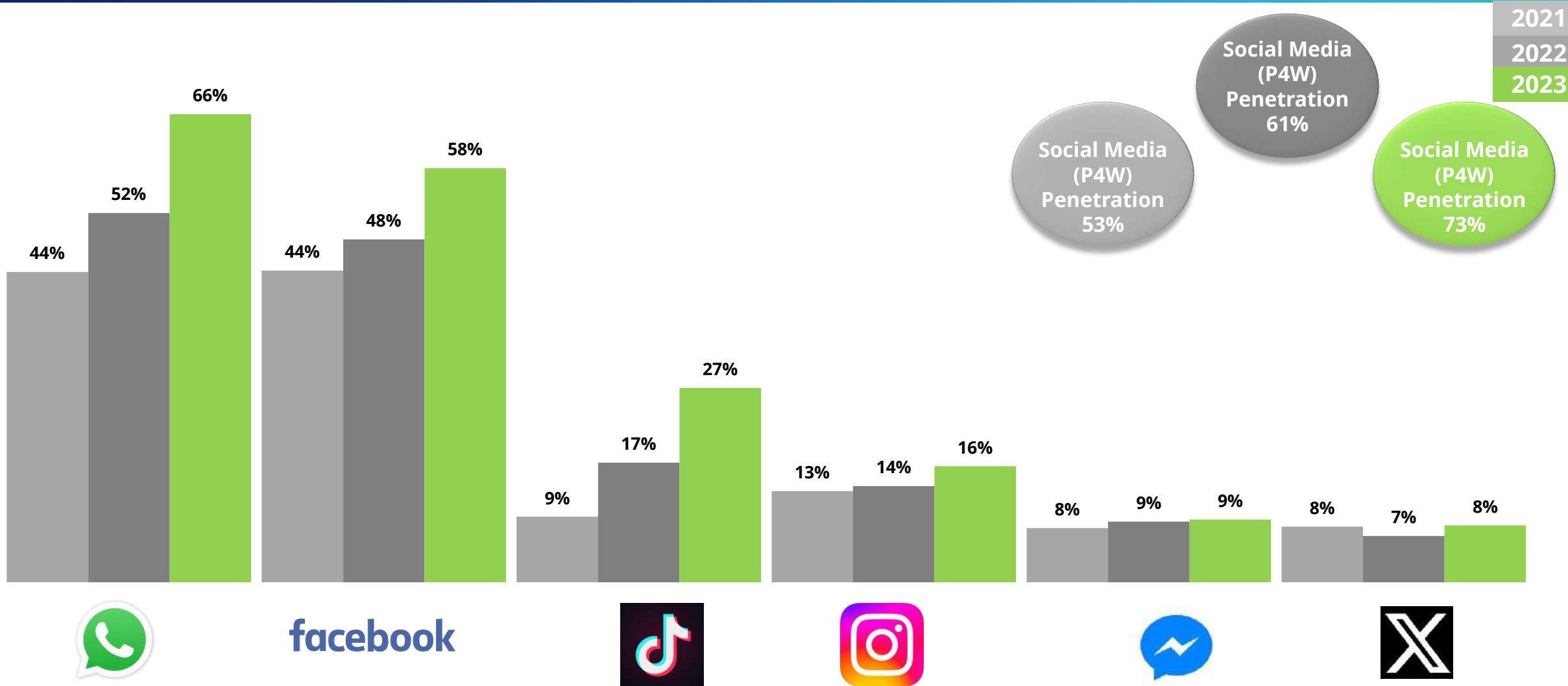


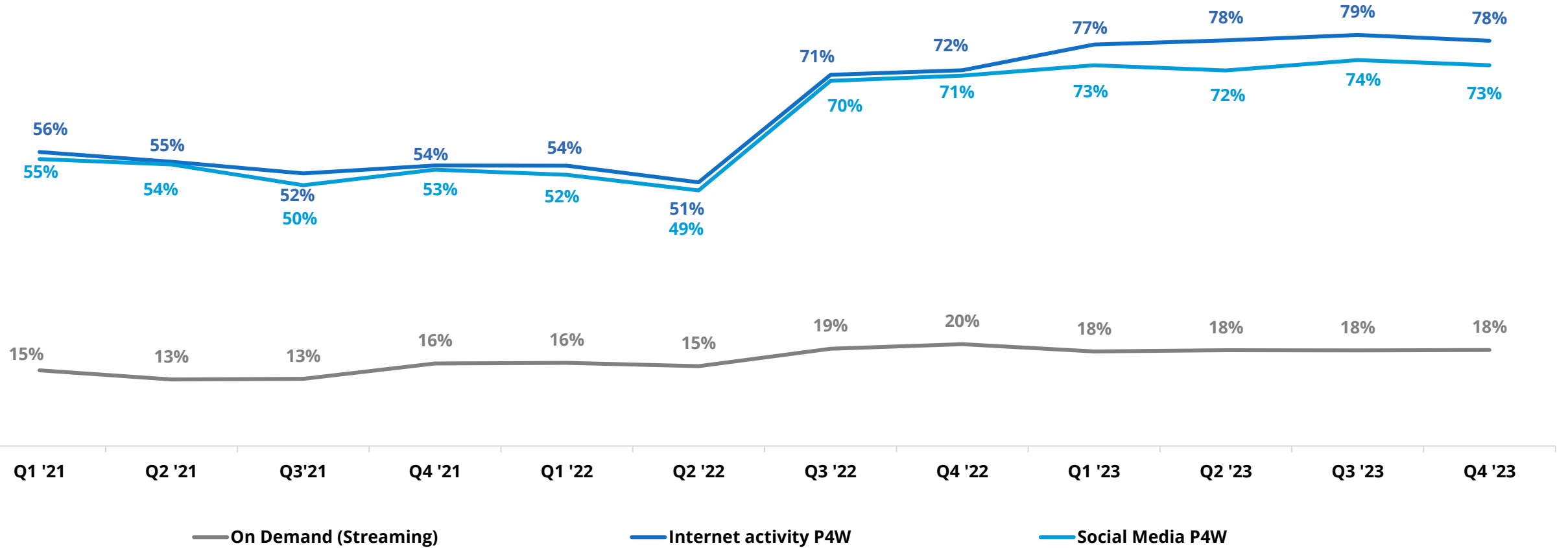
Social Media (P4W) Penetration **73%**

N = 31 960 259

Social Media* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on N = 31 960 259

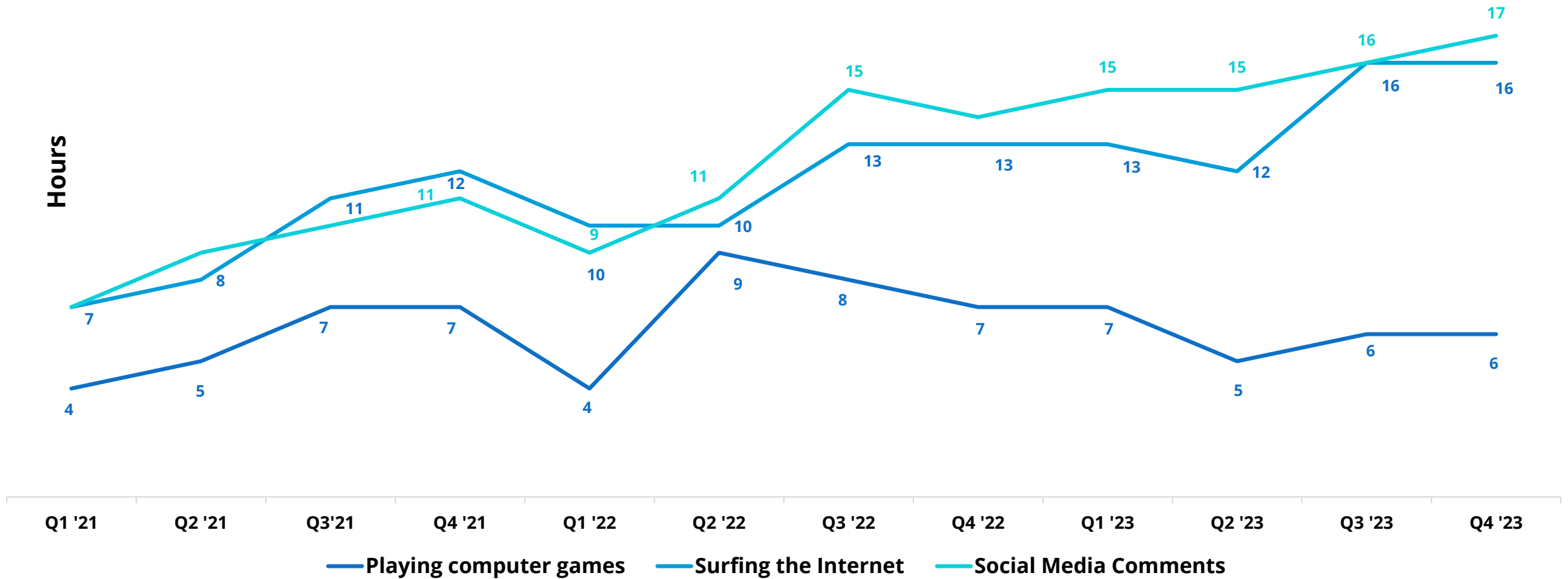
Social Media Shifts: % Pop YoY



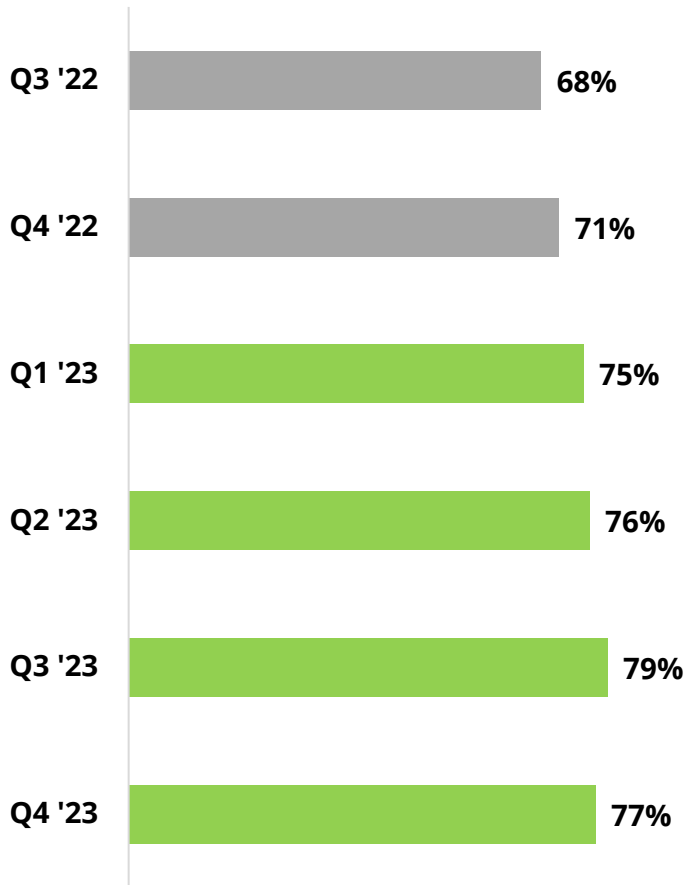


*Q2 2022-Q4 2023 data reflects significant shifts attributed to increased exposure of questionnaire questions to a broader audience.

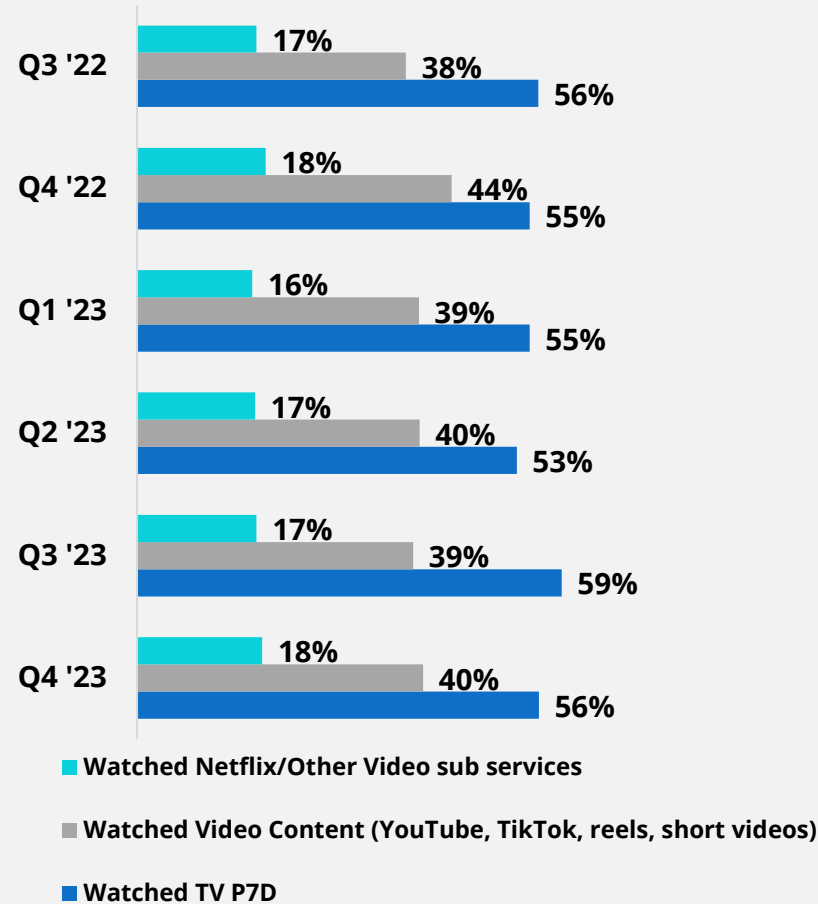
Avg Hours per Week per Activity



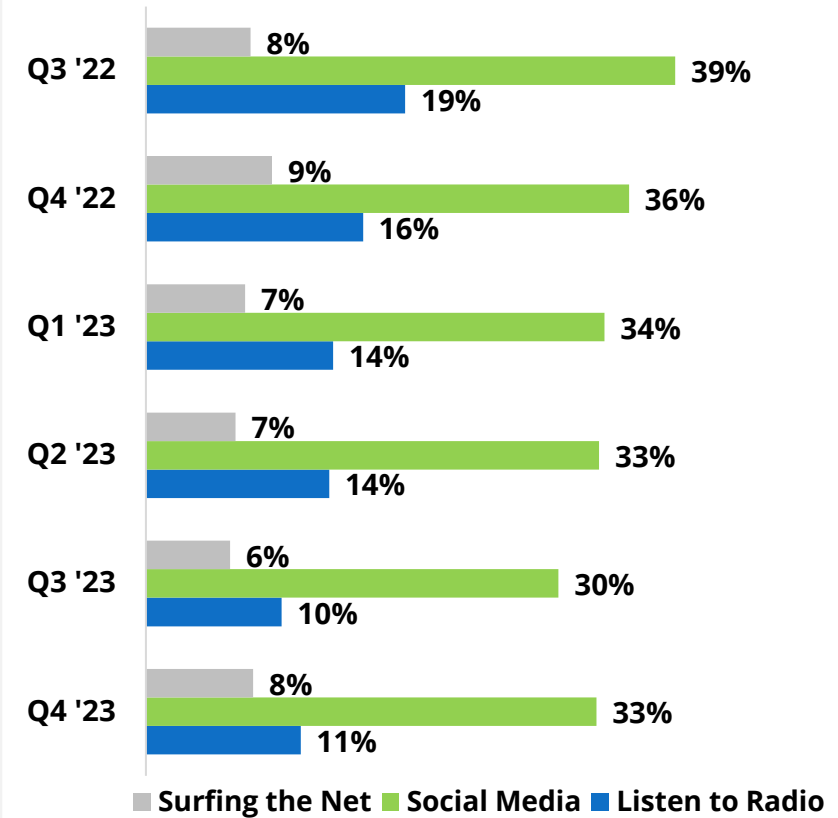
Accessed the Internet in the Past 7 Days



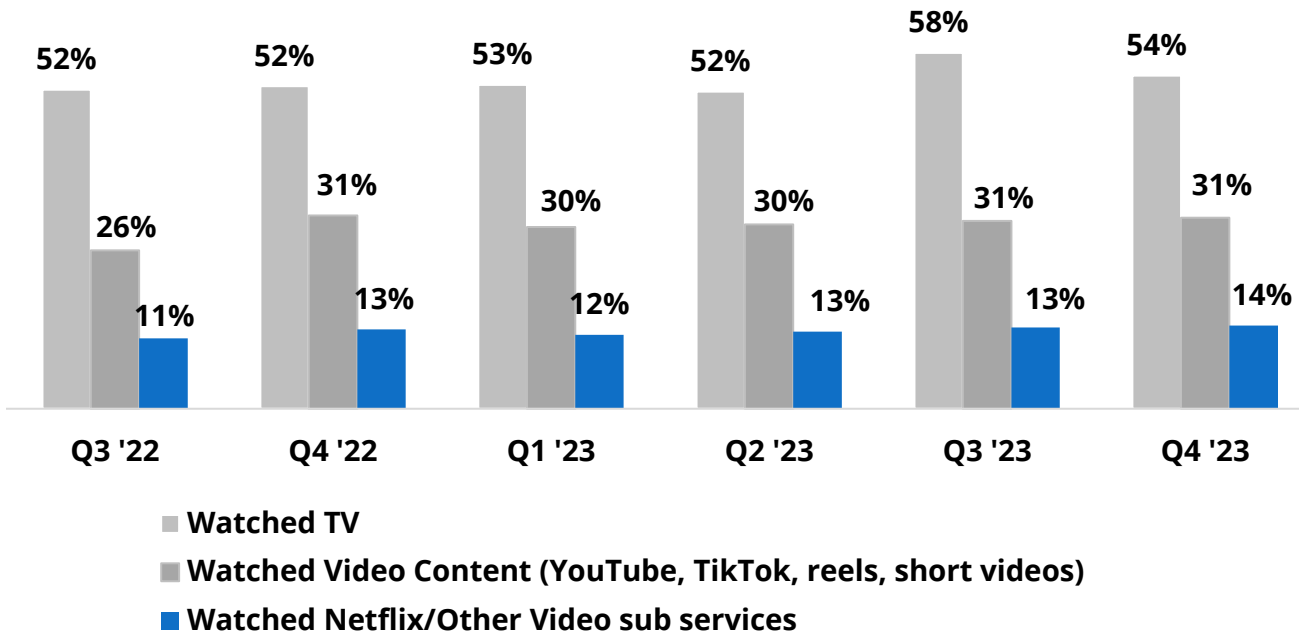
Accessed the Internet Past 7 Days: Video Viewing Consumption



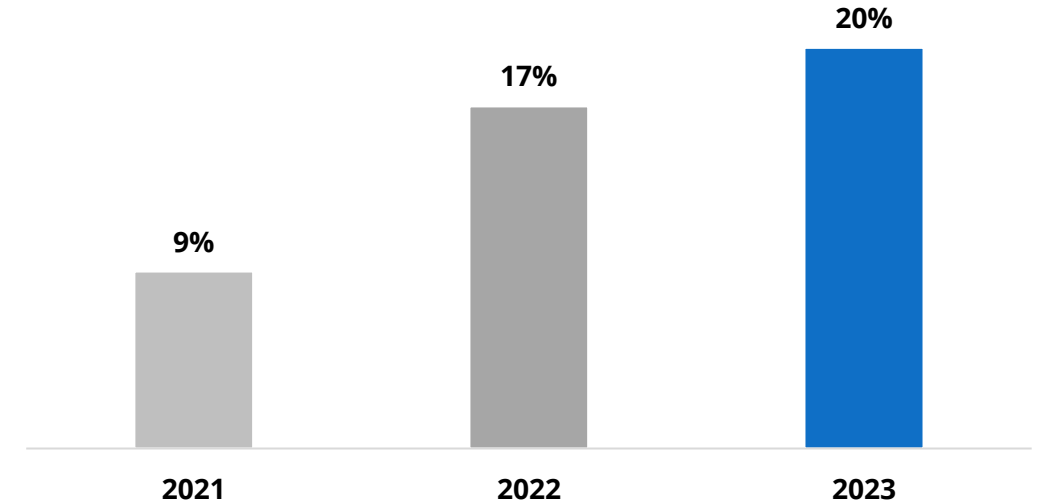
Multiplatform Behaviour Other Activities While Watching TV



Total Population Video Content Viewing
P7D



Internet Connection in the Home



3,6m Households now have fixed internet access, an increase of 143% increase over two years.

94% of people who watched video content visited these social media platforms in the past seven days.



2021
2022
2023

3.4M spend more than 20 hours per week listening to the radio

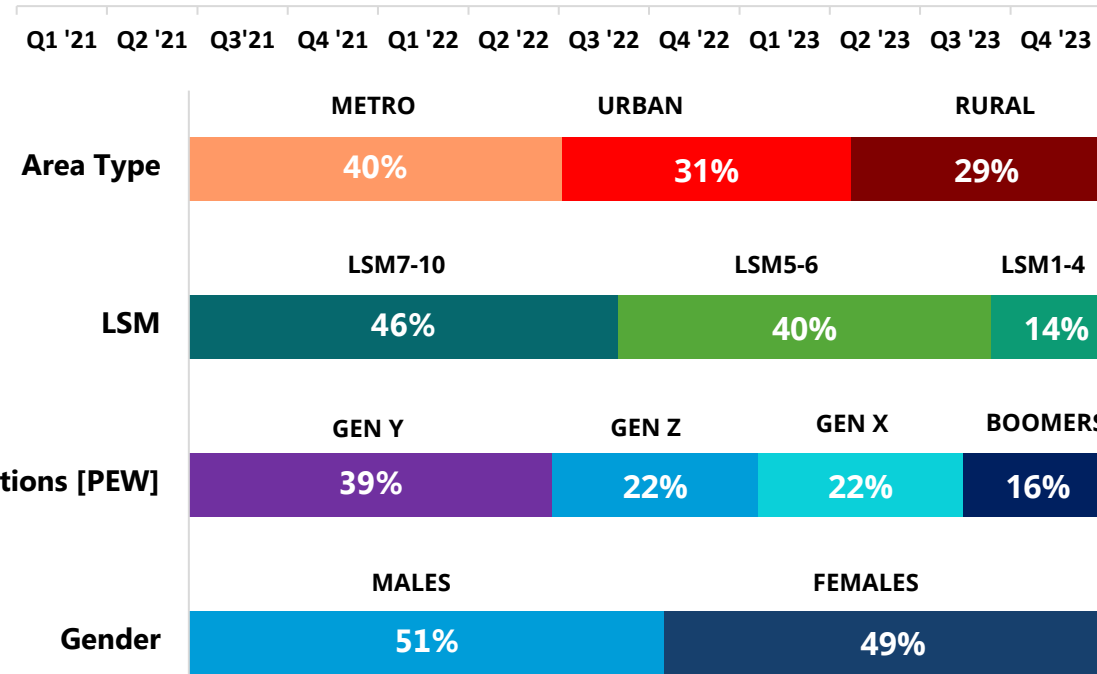
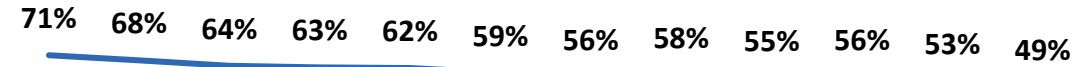
1.6M spend more than 20 hours per week listening to a podcast

21M listened to **Commercial Stations (P7D)**

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

48K listened to **Internet radio stations (P7D)**

Listened to radio stations*P7D



Radio (P7D) Penetration **53%**

Audio streaming (Ave. Week) Penetration **8%**

Podcast (Ave. Week) Penetration **4%**

P7D: TOP 5 Radio Stations

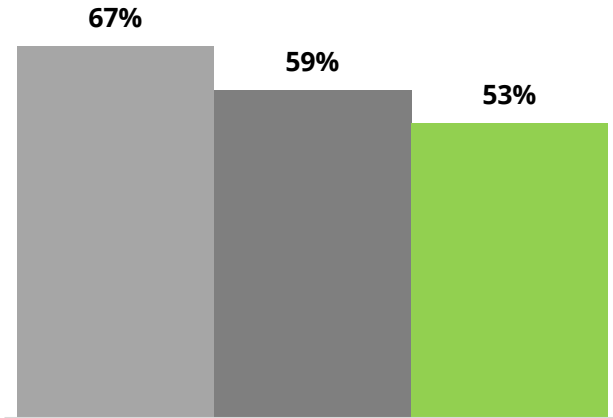


Radio Penetration* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on N = 23 286 969.

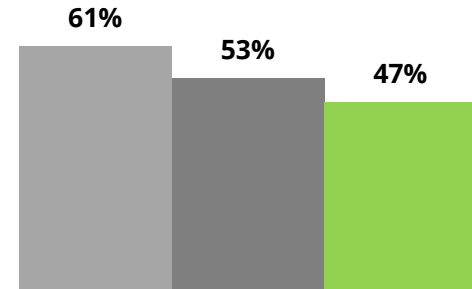
N=23 286 969

2021
2022
2023

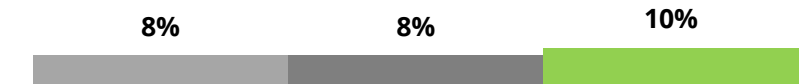
Radio Category: Past 7 Days



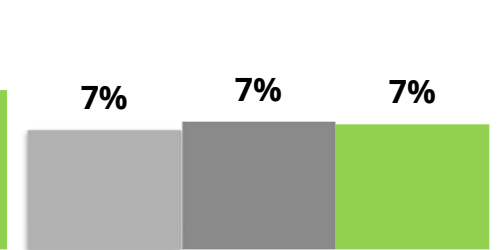
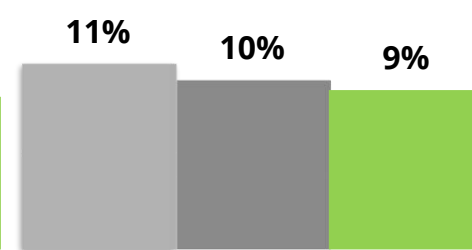
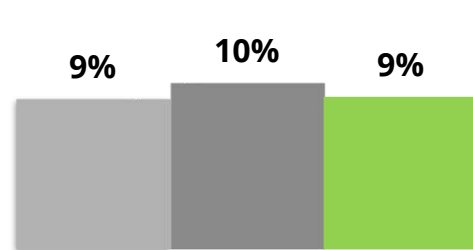
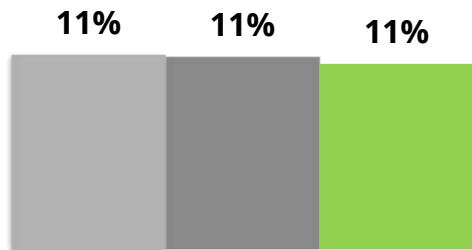
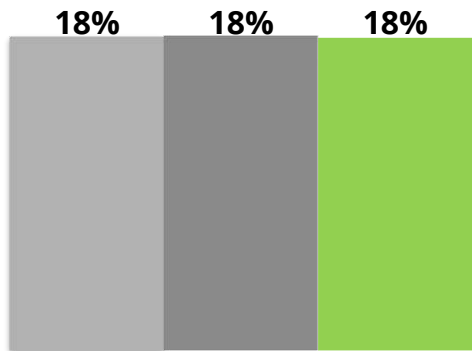
All Radio



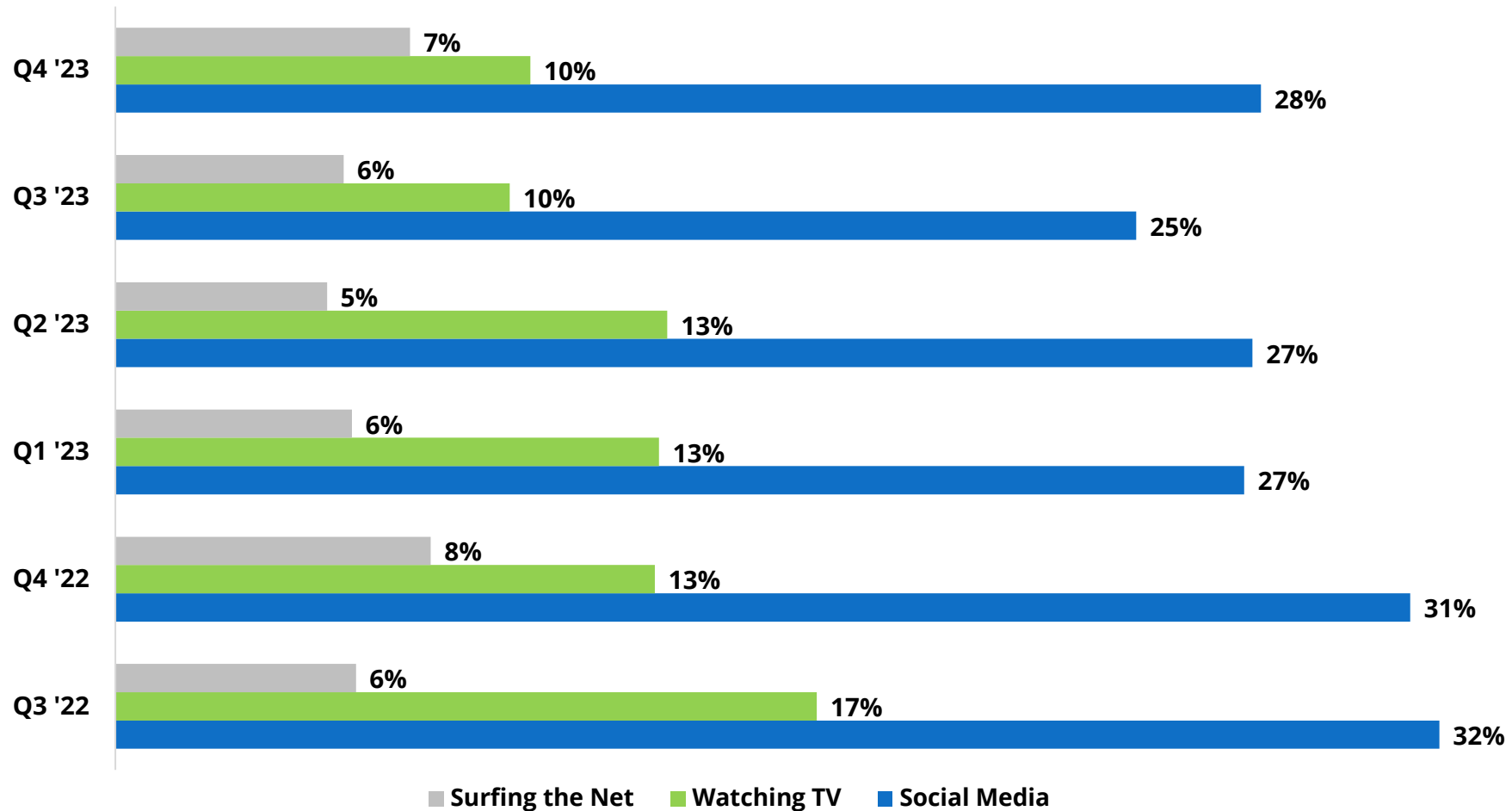
Commercial



Community



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



619K people regularly go to the **Cinema** once every 2 to 3 months.



R433,69 average cinema outing cost.

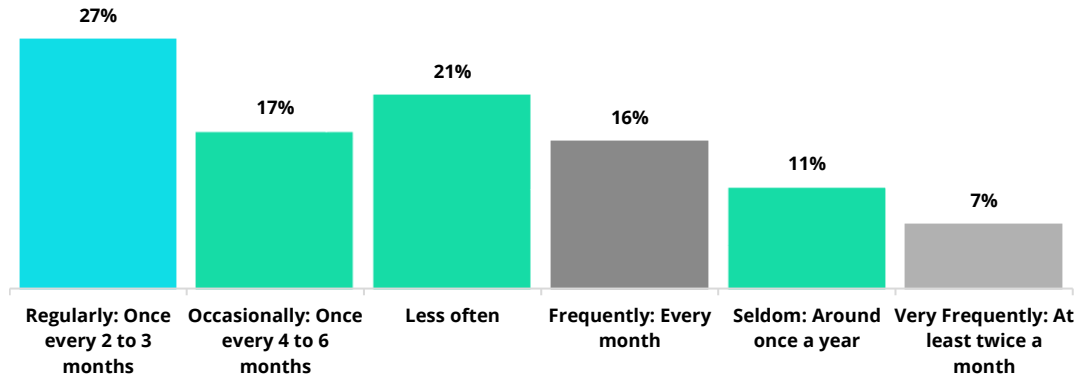
TOP 4 Cinema Chains Visited

SK STERKINEKOR ENTERTAINMENT **1.0M** Visited most often

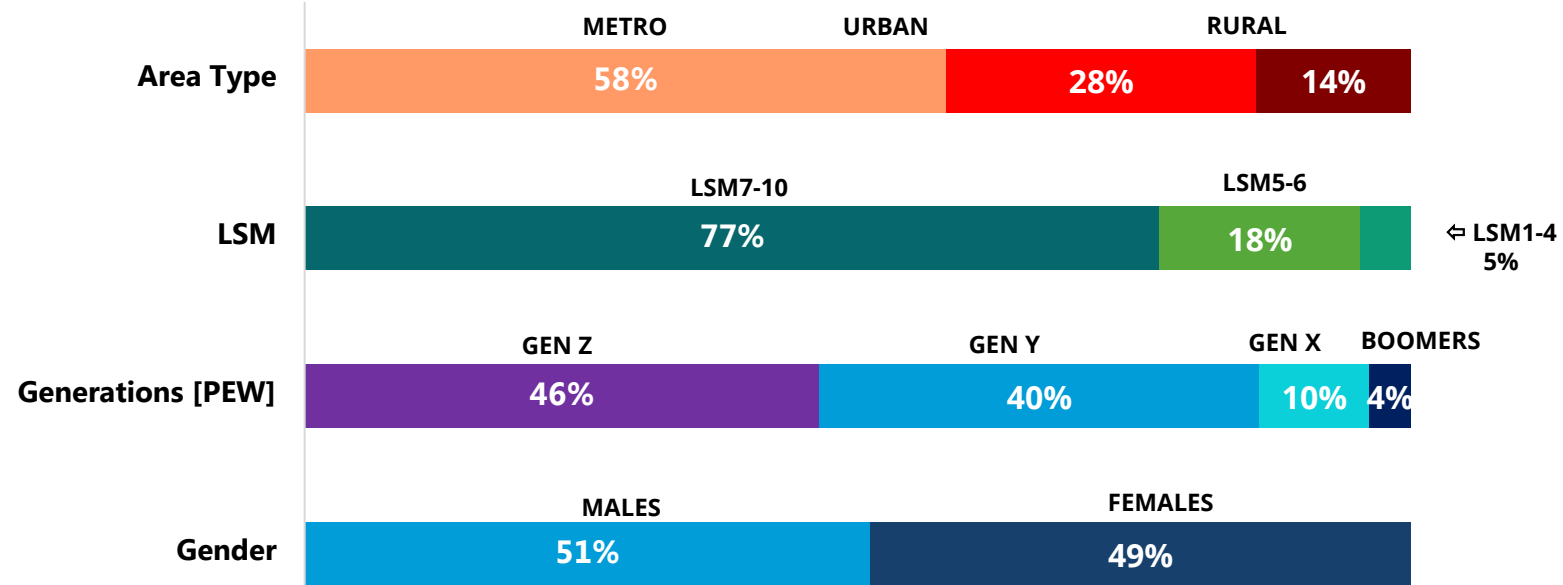
NuMetro **818K** Visited most often

movies@ **207K** Visited most often

CINECENTRE **90K** Visited most often



Cinema (P4W) Penetration **2%**

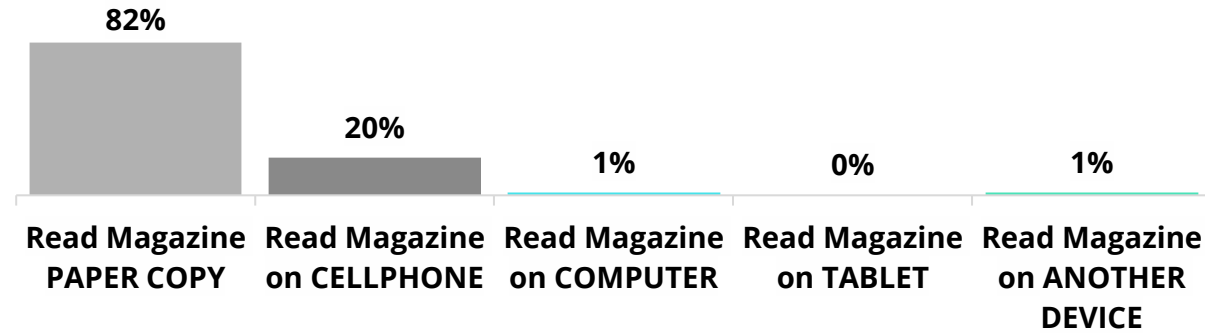


Cinema Penetration* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on N = 1 017 571

N= 1 017 571

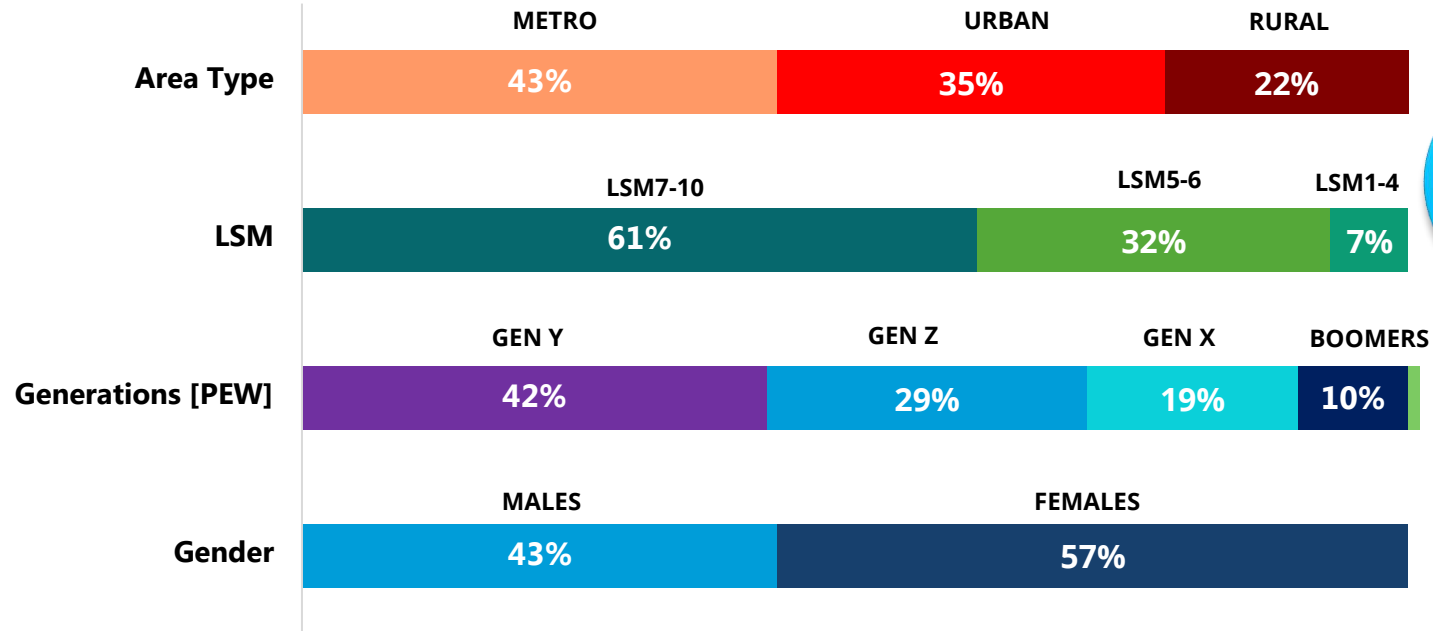
5.1M people read magazines in the past 3 months.

Top 4 Magazines



Magazine (P3M) Penetration 12%

Store Magazine (P3M) Penetration 14%



Magazine Penetration* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on N = 5 130 810.

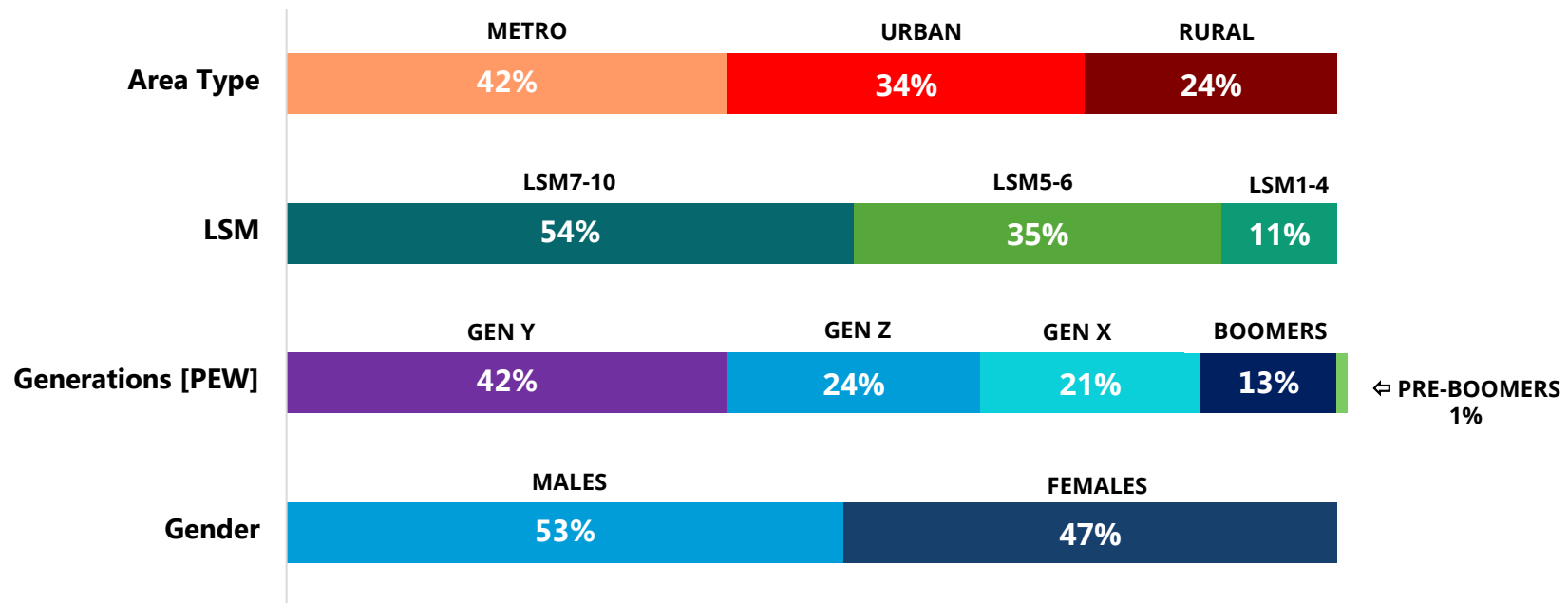
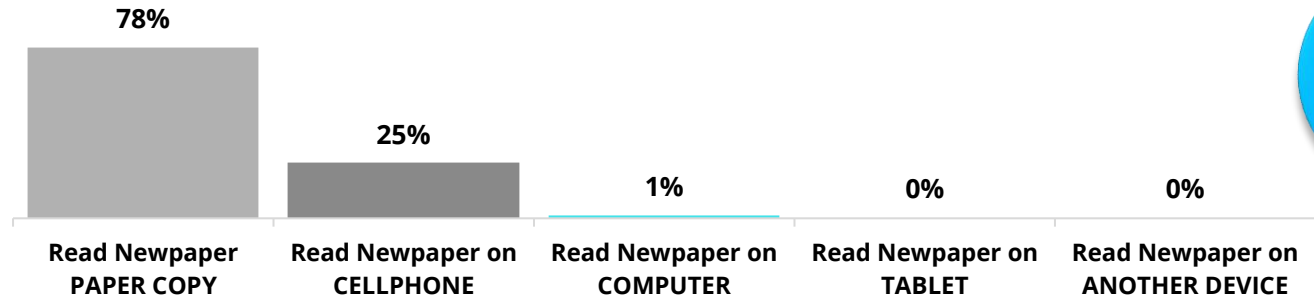
N = 5 130 810

13M people read Newspapers in the past 3 months.

Newspaper (P3M) Penetration **31%**

Top 4 Daily Newspapers

DAILY SUN	3.2M Read P3M
Isolezwe <small>NGEMPELASANTO</small>	2.1M Read P3M
Sowetan	868K Read P3M
DailyNews	698K Read P3M

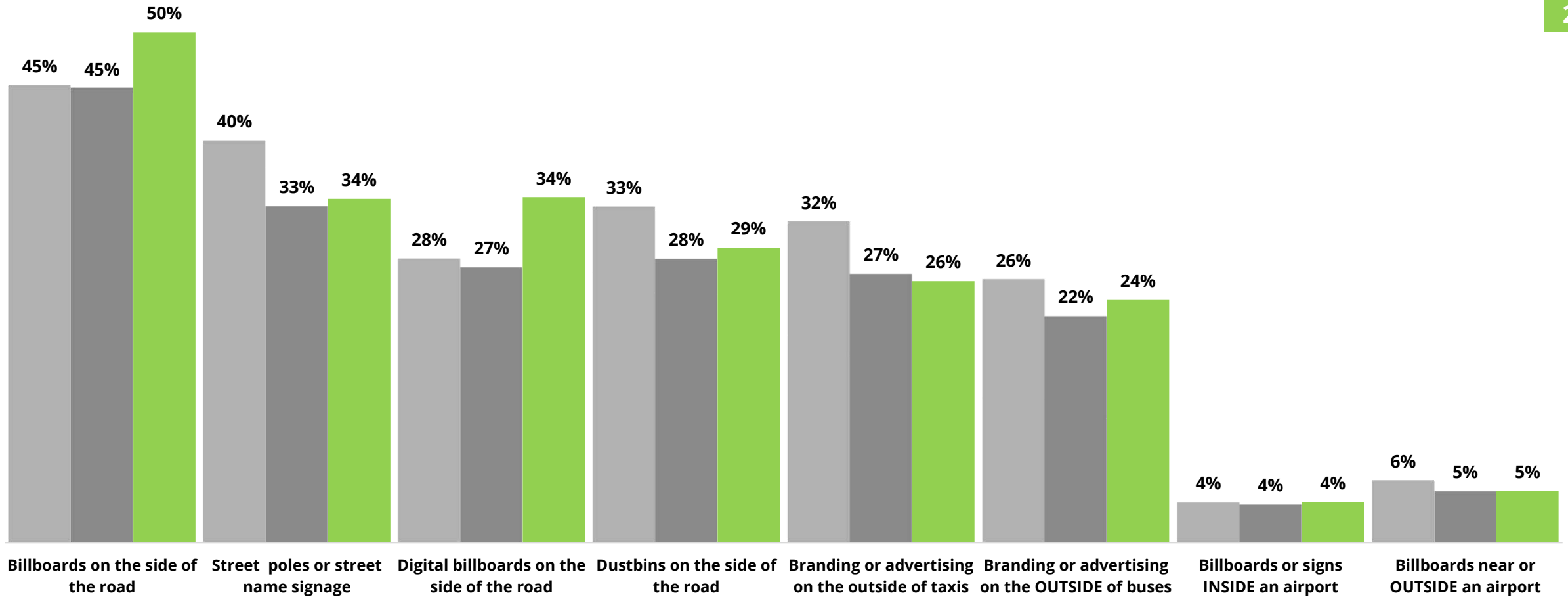


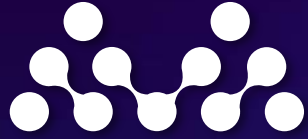
Newspaper Penetration* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on N = 13 377 028.

N = 13 377 028

OUT OF HOME P4W SHIFTS: % POP YOY

2021
2022
2023





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Financial Services



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RESEARCH



70% have a bank account excluding the SASSA accounts



10% have medical aid cover

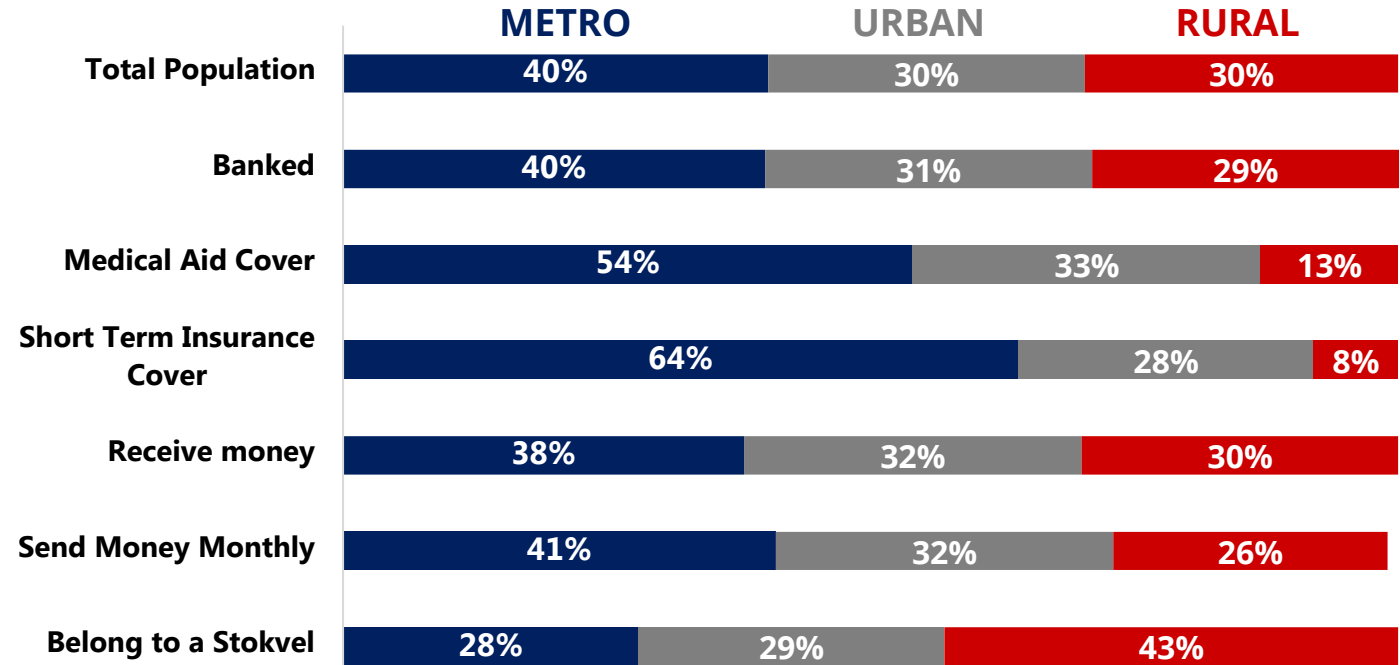


32% are insured

32% have funeral insurance or policy

3% have short term insurance.

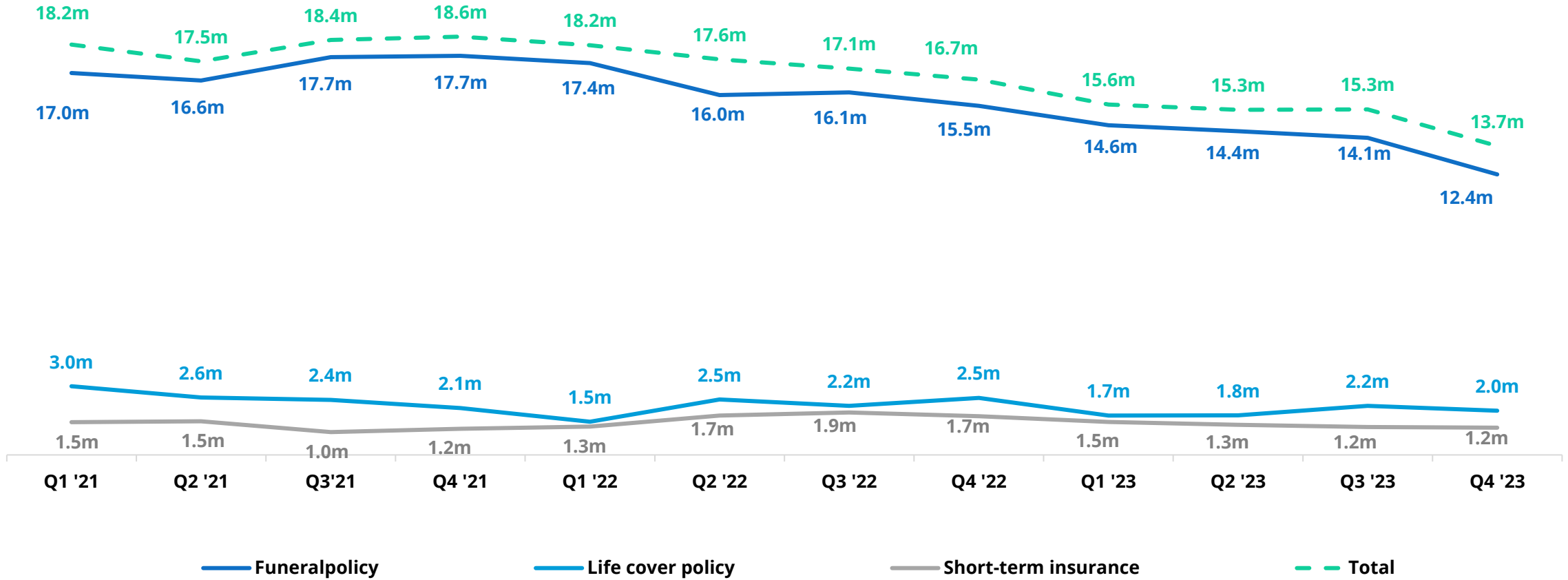
Distribution by Area



23% transfer or send money to family or friends monthly. On average **R1166** is sent.

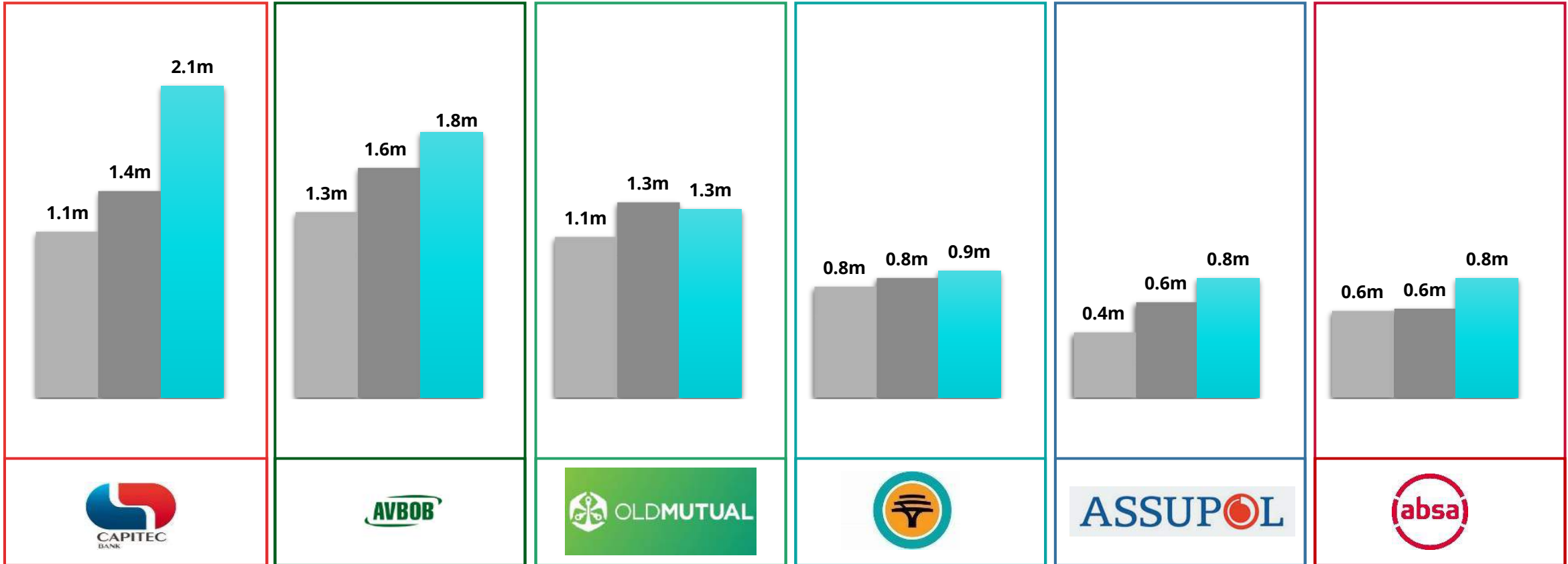
8.5% belong to a stokvel.

INSURANCE PENETRATION TREND LINE: QOQ

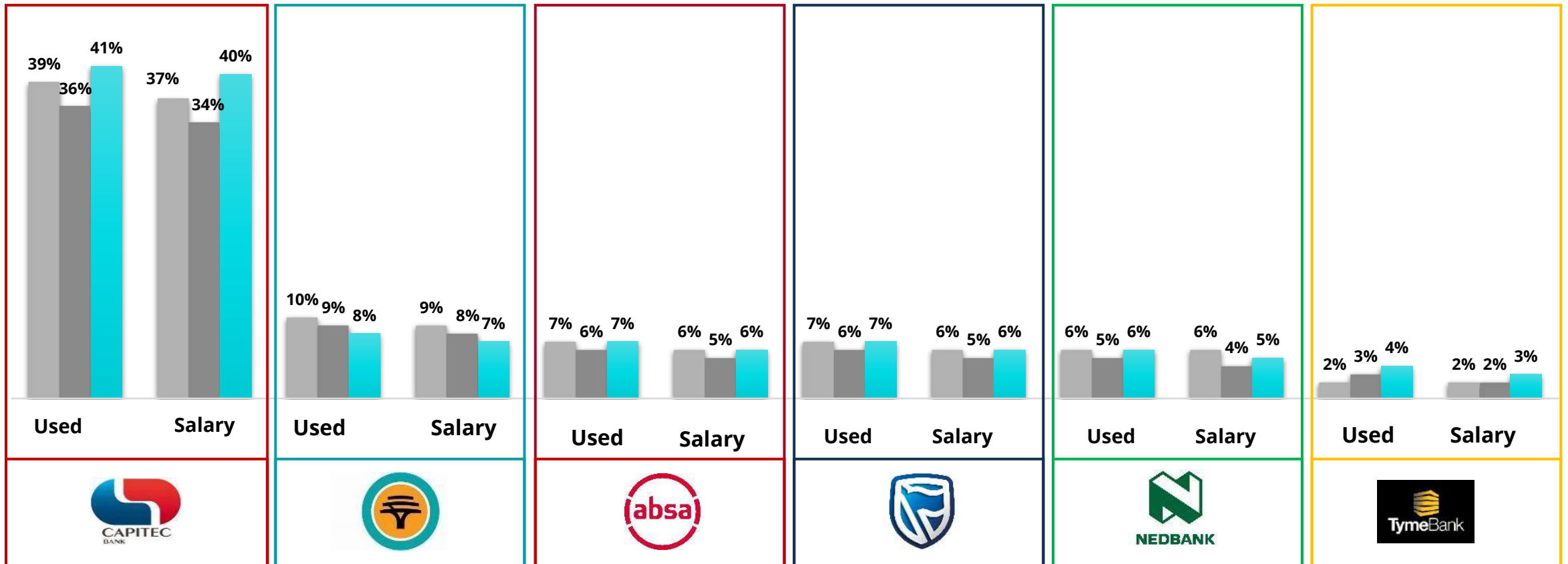


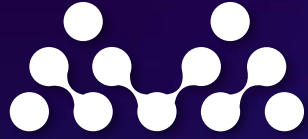
TOP INSURANCE COMPANIES USED: YOY

2021
2022
2023



Bank Usage and Salary Deposit Accounts





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Retail



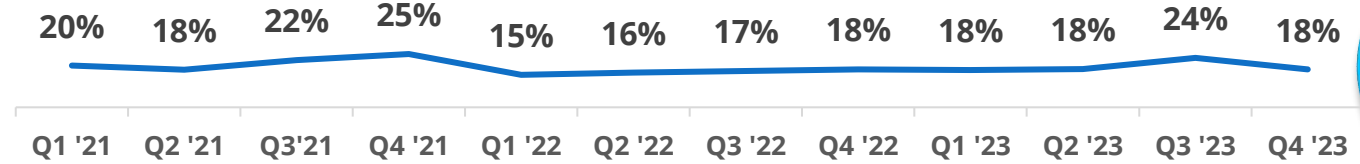
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Top 3 online shopping categories [P4W]

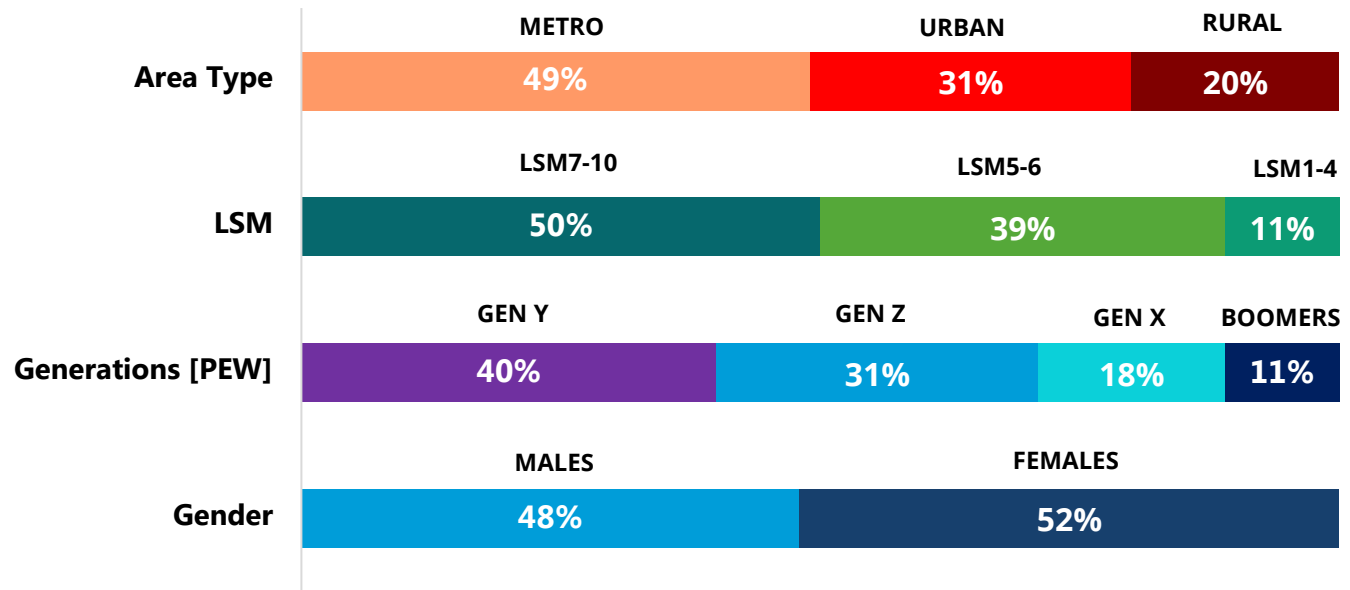
1. Communications/cellphones/prepaid (minutes/data/SMS)
5.4 million
2. Clothing
1.4 million
3. Food/drink
1.3 million

708K most often use food delivery service when purchasing take-aways.

Online Shopping* P4W



e-Commerce (P4W) Penetration
19%



P4W
317K

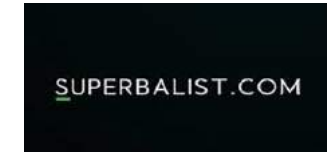


P4W
175K

CLOTHING PURCHASE ONLY*



P3M
409K*



P3M
75K*

Online shopping* - Percentages displayed on the graph at the top are based on the total population. The demographic profile results are based on N = 8 412 740

N=8 412 740



45.4% bought fast food P4W

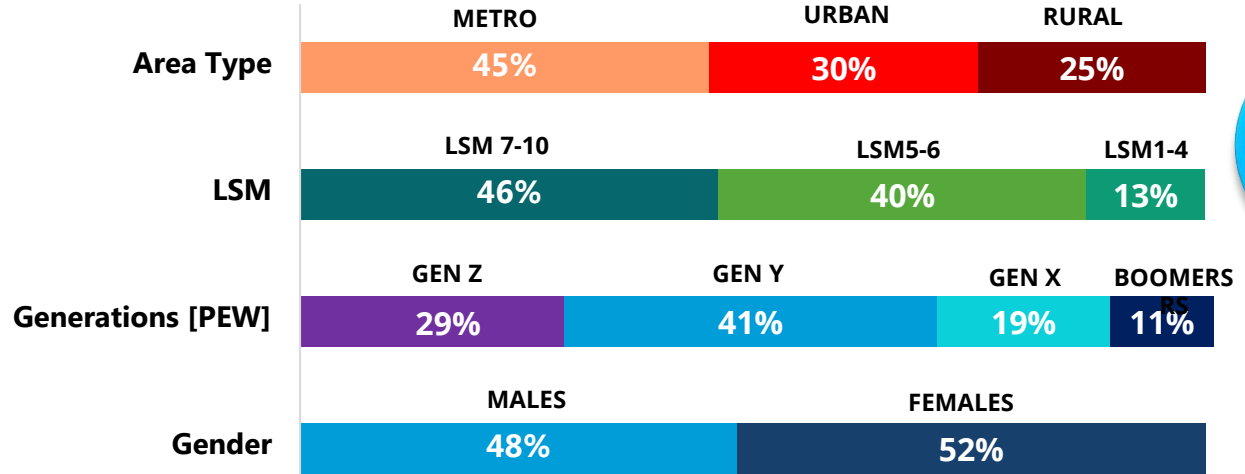


R180 average spend on fast food on last restaurant visit.

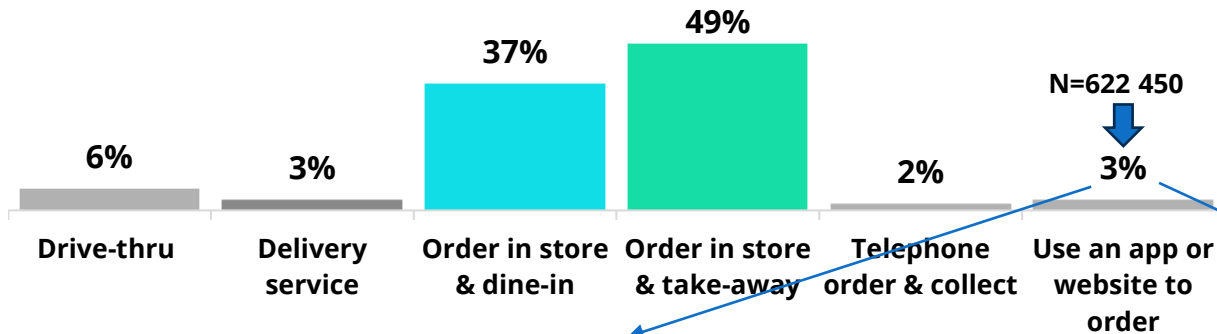
708K use Fast Food delivery Service

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

Fast Food Purchases N=19 772 955

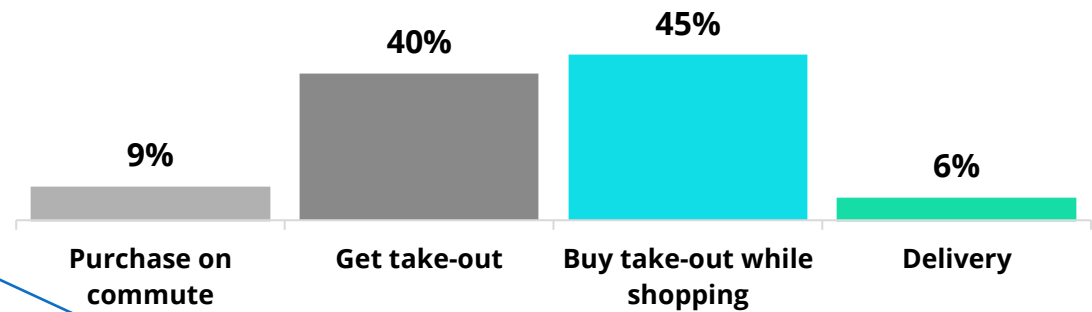


Most often used method to order food N=23 373 464



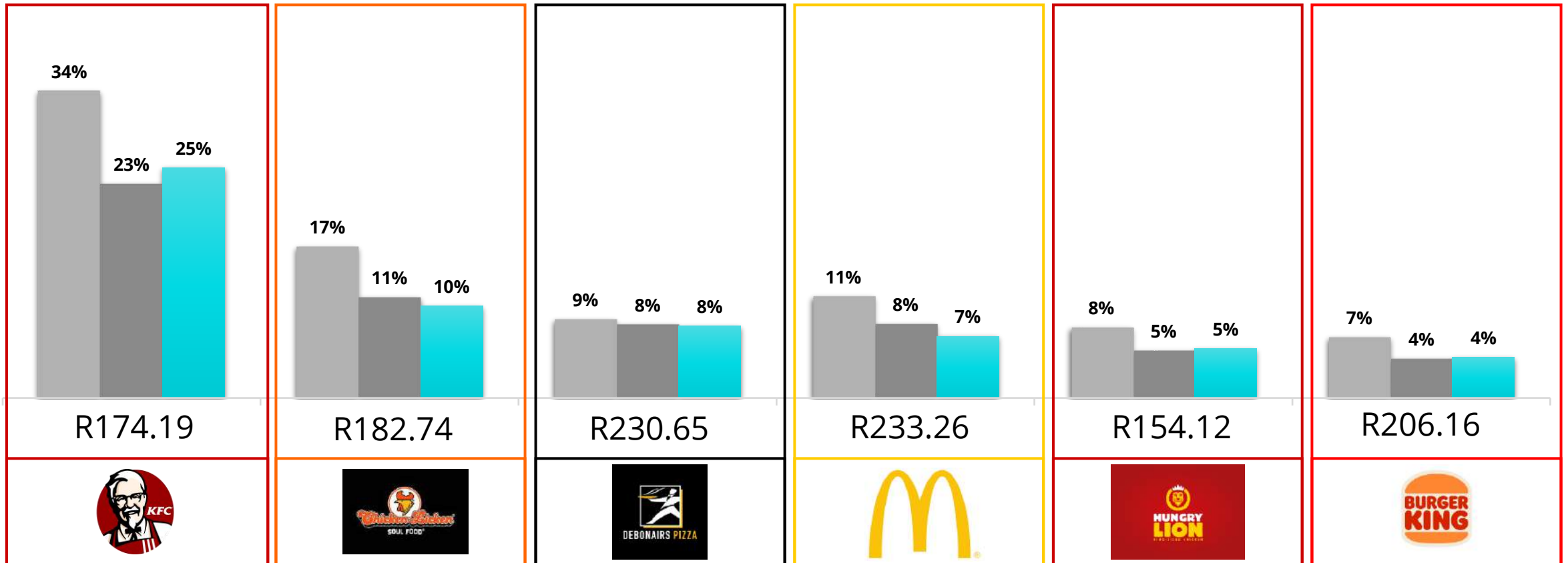
28% (P4W) order from Uber Eats

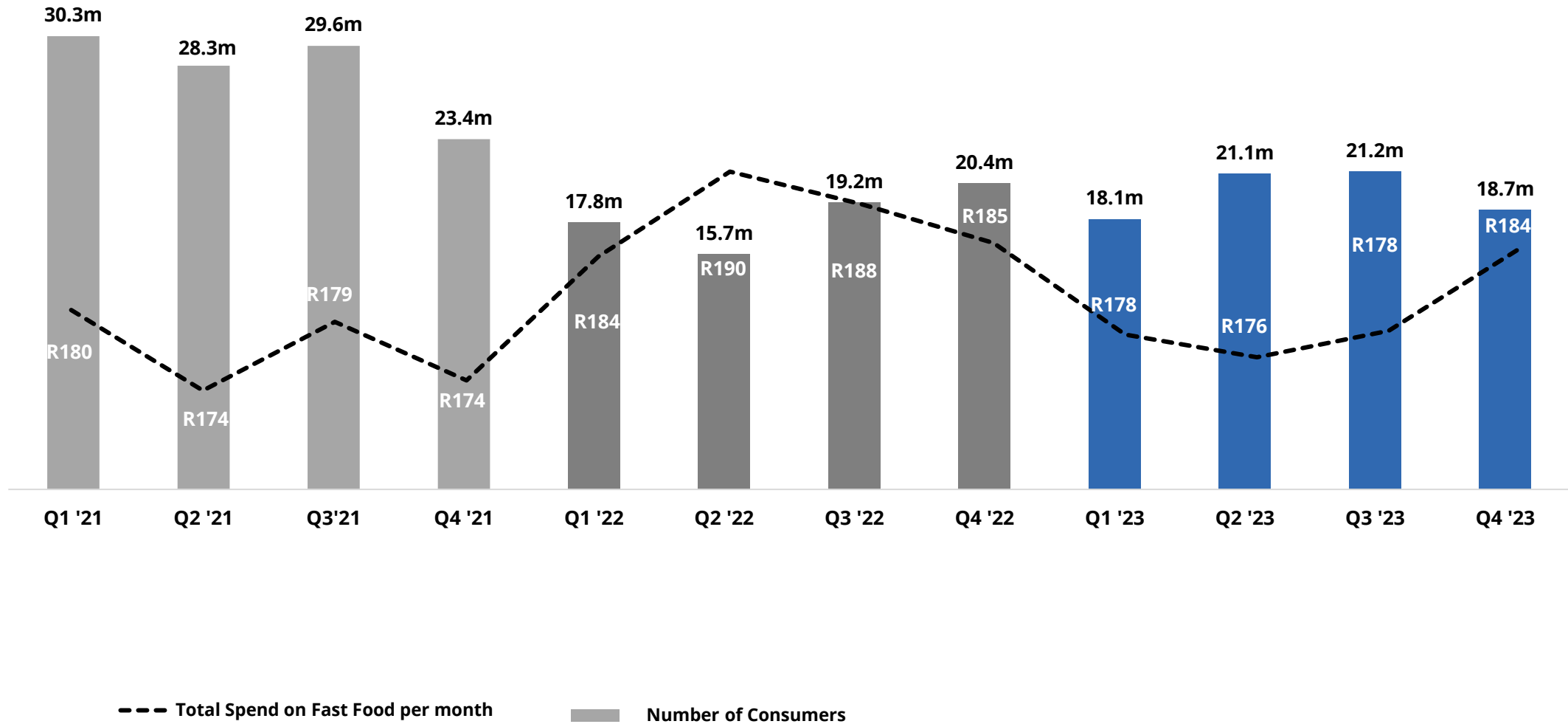
Buying behaviour N=21 056 129



51% (P4W) order from Mr. D

2021
2022
2023





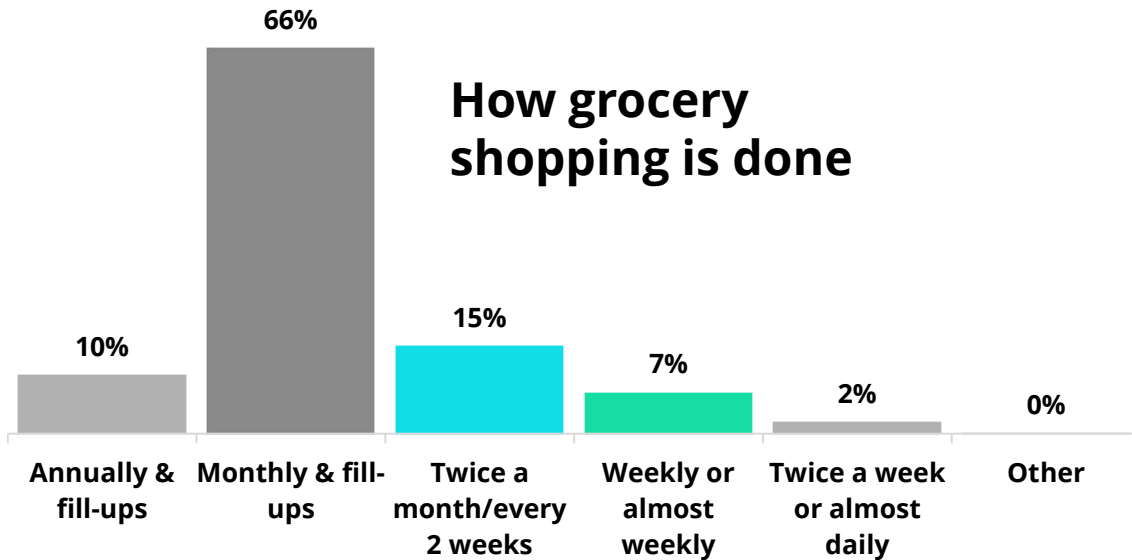


R2 050,25 average monthly spend on groceries.

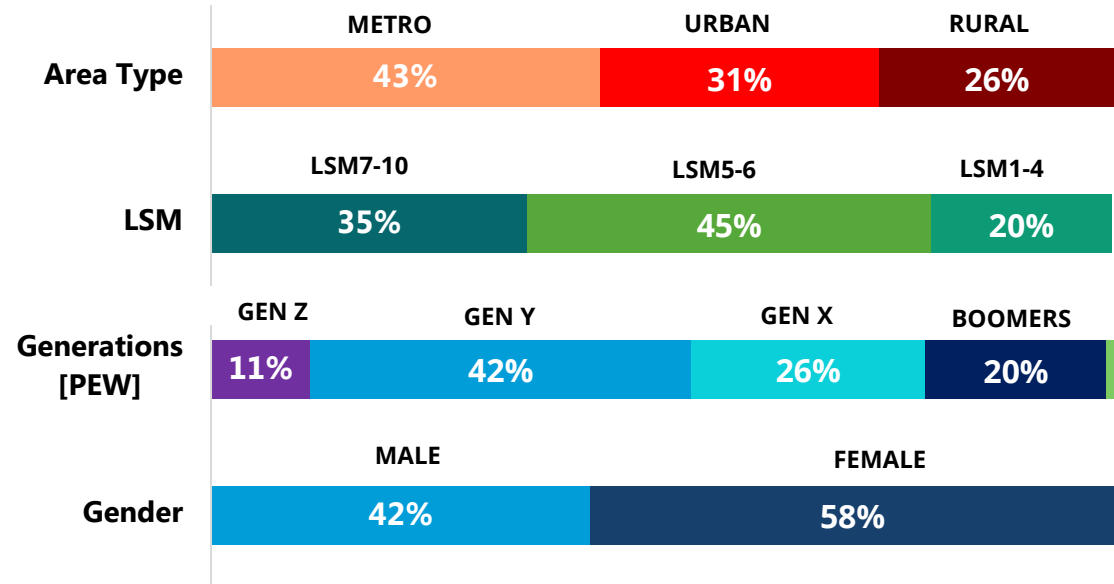


56% of the respondents usually do the grocery shopping themselves in their household.

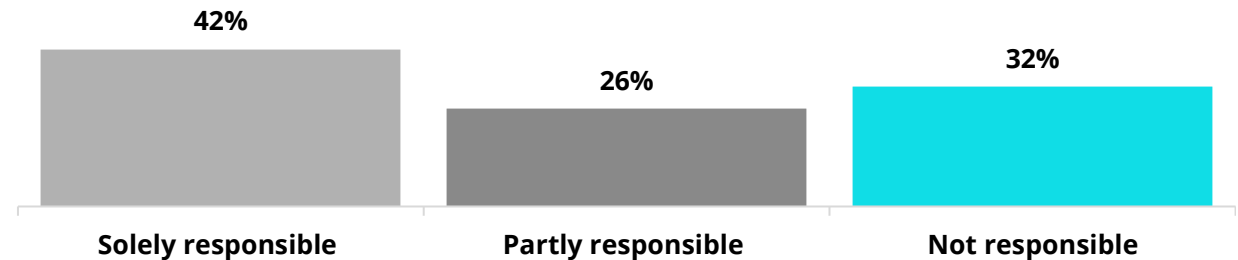
How grocery shopping is done

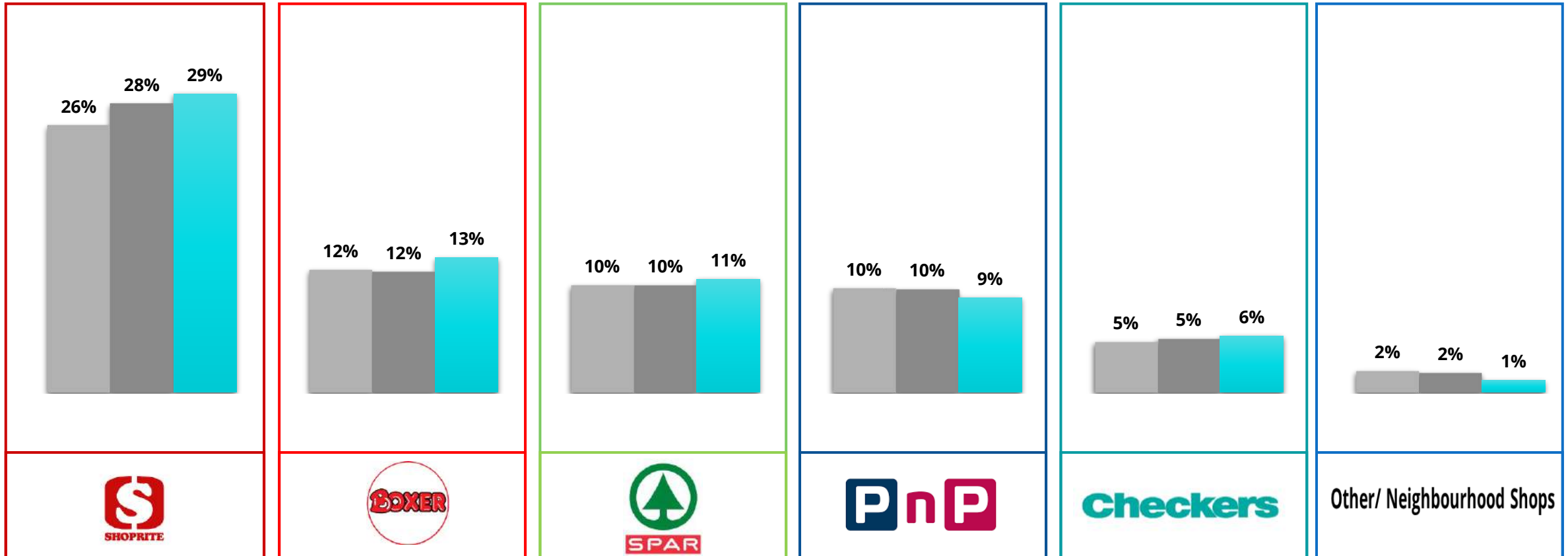


Shopping Responsibility

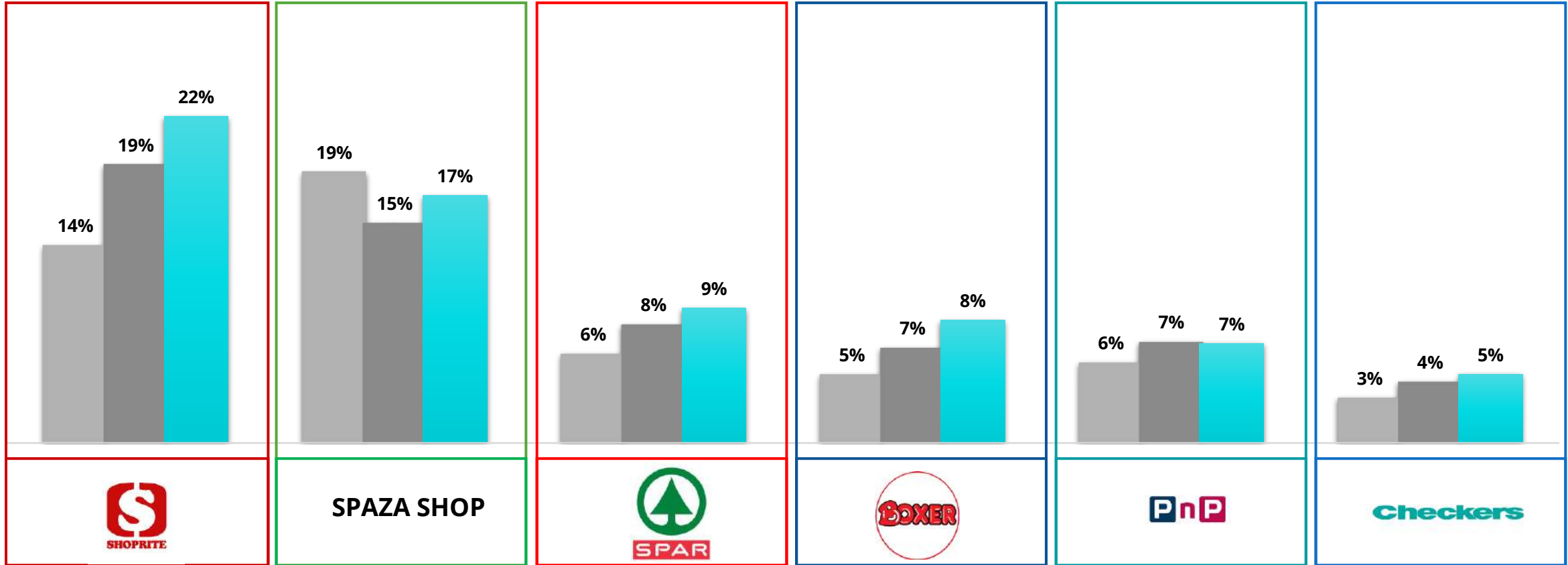


Household purchases responsibilities

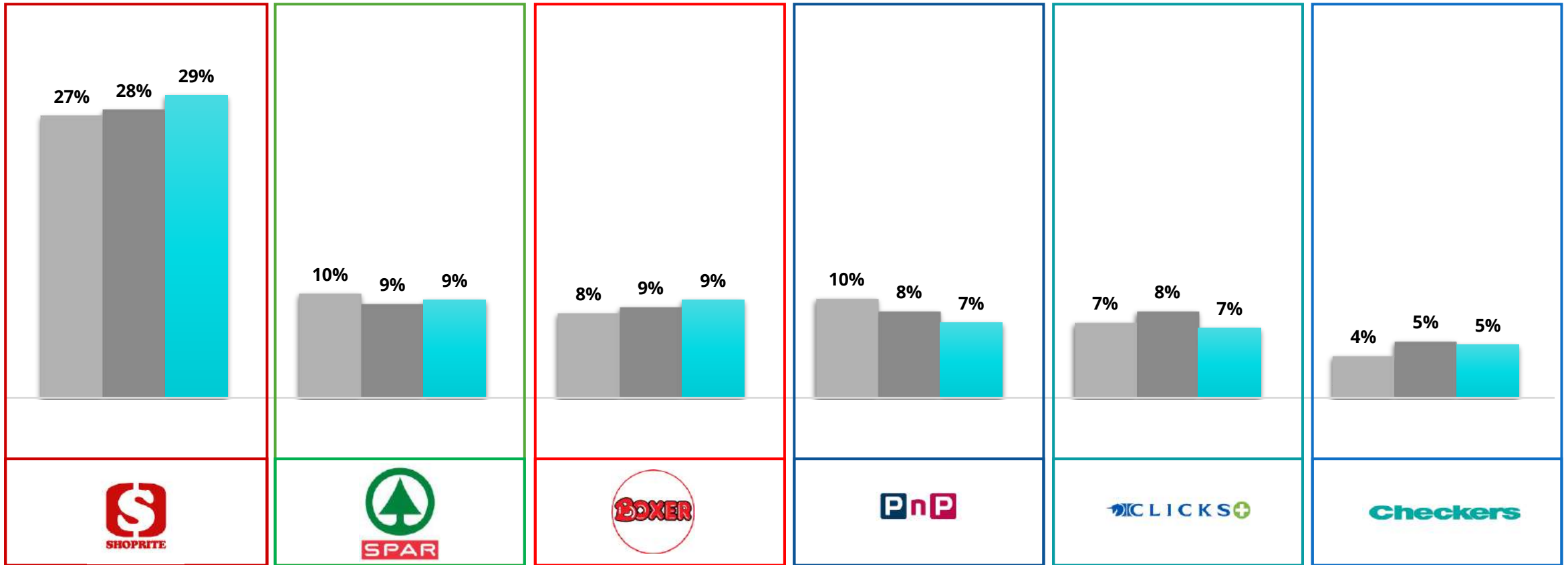





2021
2022
2023




2021
2022
2023






R648 average monthly spend on alcoholic beverages

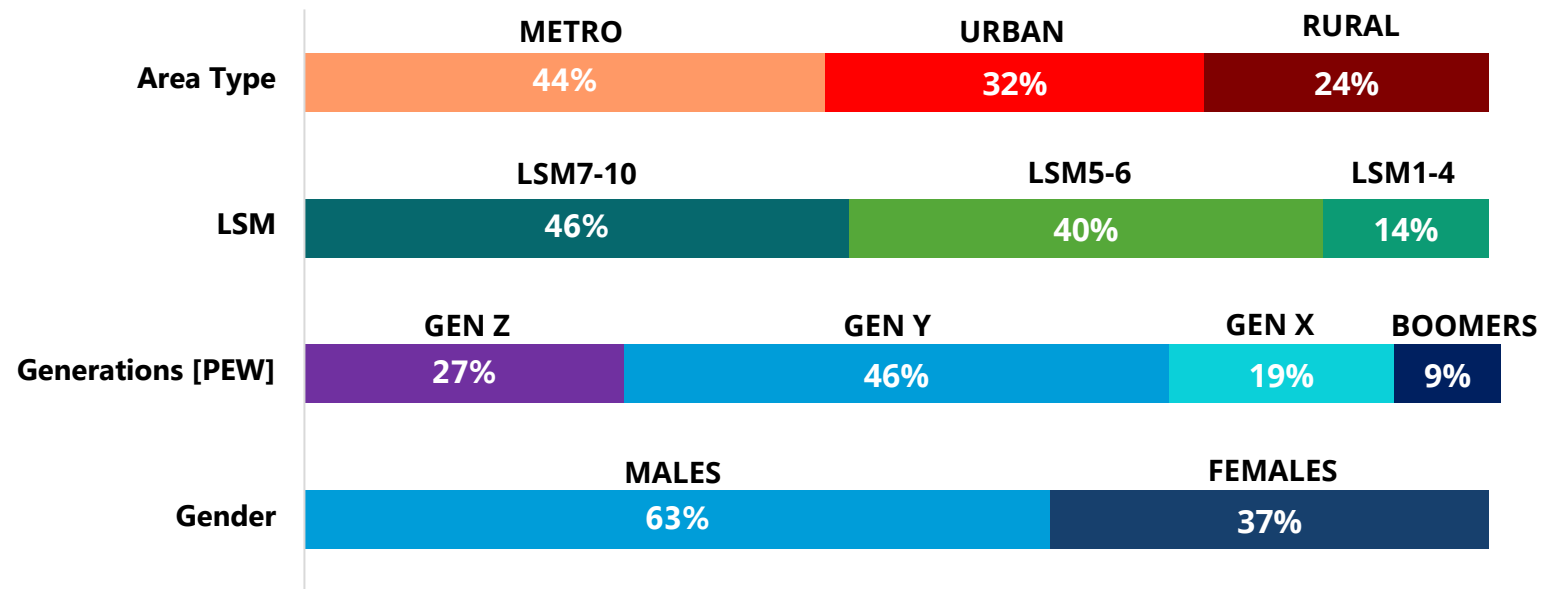


33% bought liquor in P4W

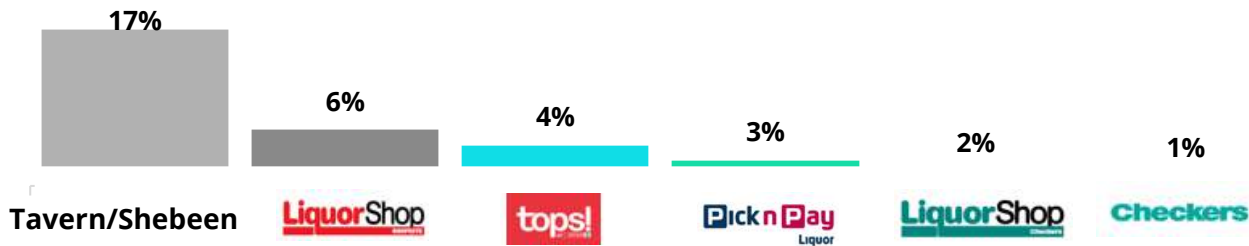


17% bought liquor in P4W from a tavern/shebeen

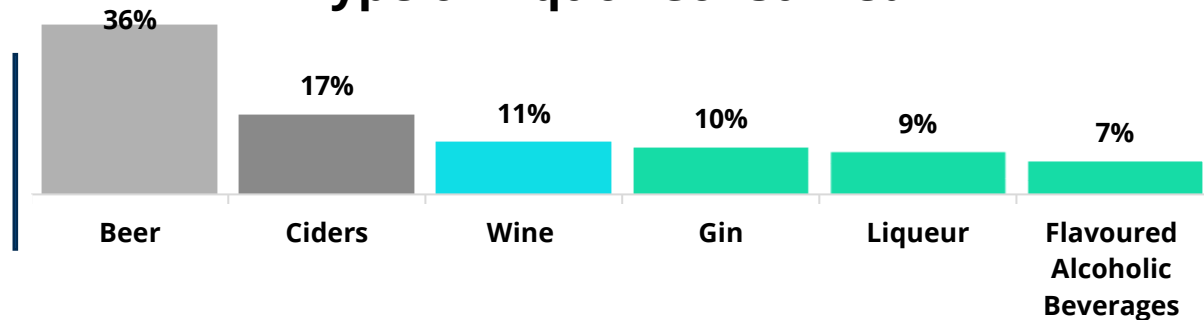
Bought Alcohol P4W Population Distribution



Top Liquor Outlets P4W



Type of Liquor Consumed P4W





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nubiz@plus94.co.za

[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.

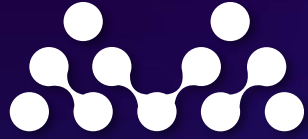
Taverns: A place of business where alcoholic beverages are sold to be consumed on the premises. Like a pub or bar.

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.



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Thank you.



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