

CAPE TOWN TOURISM SA CONSUMER LOCKDOWN LEVEL 3 IMPACT REPORT



As South Africa moved into lockdown level 3 on the 1 June 2020, Cape Town Tourism wanted to understand what the impact had been on South Africans. The objective of the survey was to better understand their current reality, challenges, what information was important and where they would be spending their disposable income when regulations allowed.

SURVEY: 1 JUNE – 12 JUNE 2020 | 5485 RESPONSES



Disclaimer: Cape Town Tourism, 01 July 2020

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A SAMPLE OF 5485 SOUTH AFRICANS PARTICIPATED IN THE SURVEY

GENDER

31% Male | 69% Female

RACE

1%	Asian	1%	Other
6%	Indian	24%	Coloured
29%	White	39%	Black

AGE

24% 18-24 years old
30% 25-34 years old
26% 35-49 years old
20% 50+ years old

EMPLOYMENT STATUS

4%	Retired	6%	Other
9%	Employed part-time	9%	Self employed
32%	Employed permanently	40%	Unemployed

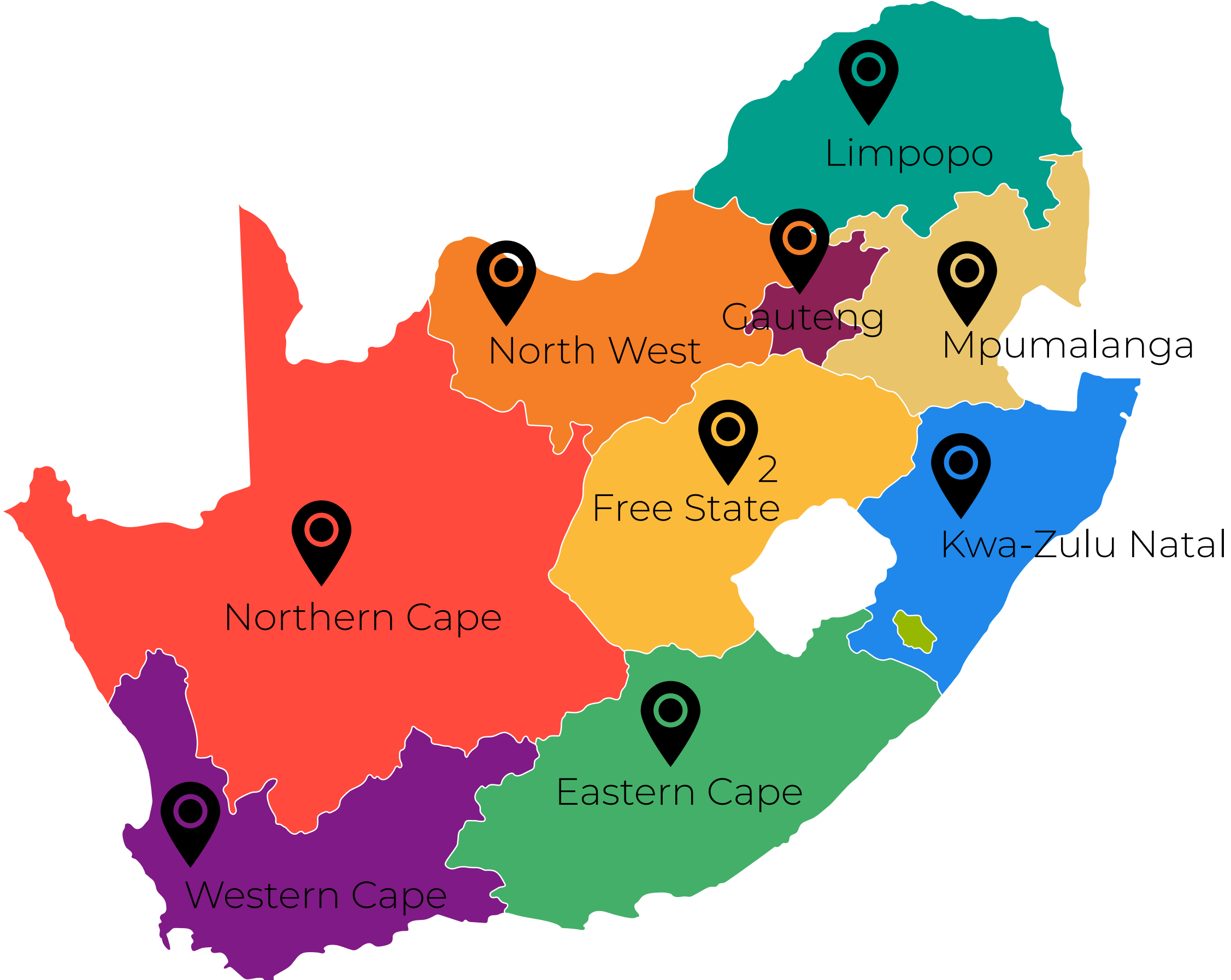
MONTHLY HOUSEHOLD INCOME

63%	Less than R10 000	18%	R10 001 - R20 000
8%	R20 001 - R30 000	5%	R30 001 - R40 000
4%	R40 001 - R80 000	1%	R80 001 - R120 000
1%	R120 001+		

THE SAMPLE IS STATISTICALLY REPRESENTATIVE OF THE POPULATION OF SOUTH AFRICA WITH A MARGIN OF ERROR OF 5%

PROVINCE OF RESIDENCE

1%	Northern Cape	2%	North West
2%	Free State	3%	Mpumalanga
3%	Limpopo	6%	Eastern Cape
15%	Kwa-Zulu Natal	29%	Gauteng
39%	Western Cape	61%	Reside outside of the Western Cape



SOUTH AFRICAN POPULATION DEMOGRAPHICS AS PER STATISTICS SOUTH AFRICA (STATS SA)

A significantly greater % of females completed the survey compared to the SA population.

GENDER

49% Male | **51%** Female

A significantly smaller % of black respondents completed the survey compared to the SA population.

RACE

3% Asian | **9%** Coloured
8% White | **81%** Black

AGE

13% 20-24 years old
30% 30-34 years old
30% 35-49 years old
27% 50+ years old

50% of the participants had some form of employment compared to 42% of the SA population.

EMPLOYMENT STATUS

42% Employed part-time | **40%** Self employed
18% Employed permanently | Not economically active (discouraged work-seekers, not economically active, other)

MONTHLY HOUSEHOLD INCOME

68% Less than R10 000 | **13%** R10 001 - R20 000
7% R20 001 - R30 000 | **3%** R30 001 - R40 000
6% R40 001 - R80 000 | **2%** R80 001 - R120 000
1% R120 001+

There was a significantly greater participation by respondents residing in the Western Cape.

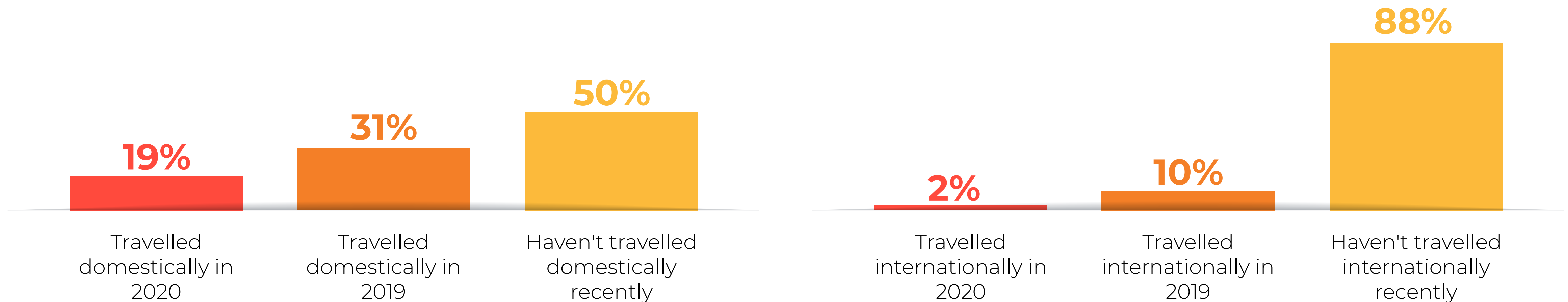
PROVINCE OF RESIDENCE

2% Northern Cape | **7%** North West
5% Free State | **8%** Mpumalanga
10% Limpopo | **11%** Eastern Cape
19% Kwa-Zulu Natal | **26%** Gauteng
12% Western Cape

50% HAVE TRAVELLED DOMESTICALLY IN 2019-2020, WHILST ONLY 12% HAVE TRAVELLED OVERSEAS OVER THE SAME PERIOD

DOMESTIC TRAVEL HISTORY

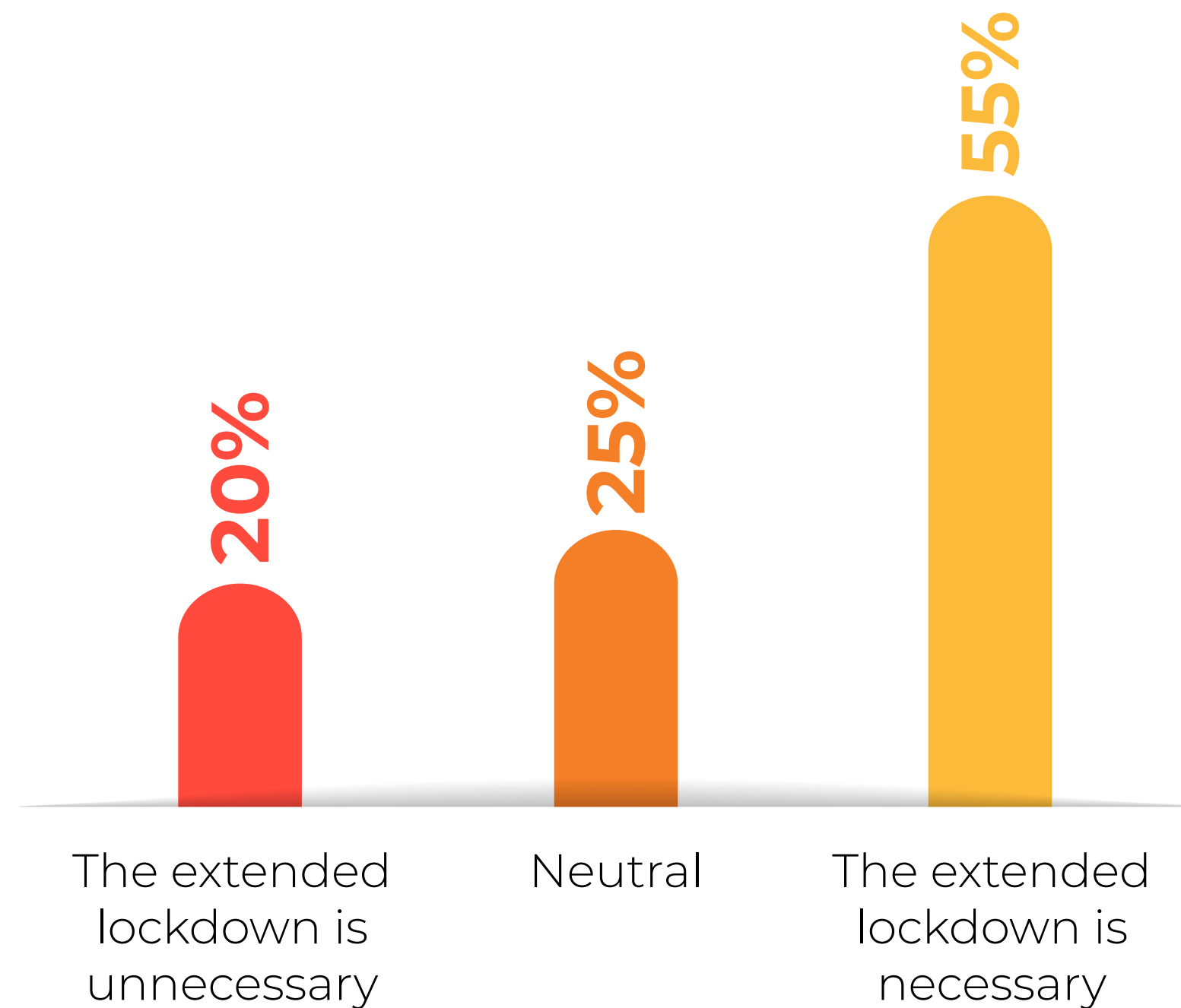
INTERNATIONAL TRAVEL HISTORY



55% OF RESPONDENTS FEEL THAT THE EXTENDED LOCKDOWN IS NECESSARY

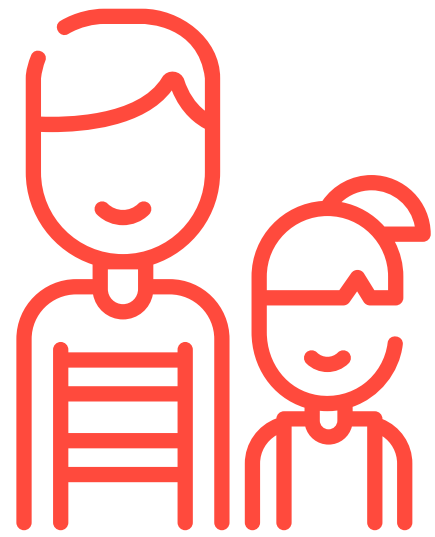
Q: HOW DO YOU FEEL ABOUT THE COVID-19 LOCKDOWN?

RESPONDENTS' FEELINGS ABOUT LOCKDOWN



RESPONDENTS HAVE EXPERIENCED A NUMBER OF POSITIVE ASPECTS WITH LOCKDOWN

THE BEST THINGS ABOUT LOCKDOWN



**SPENDING
TIME WITH
FAMILY**



**WORKING
FROM HOME**



**CONTROLLING THE
SPREAD OF THE
VIRUS**



**LESS CRIME AND
ROAD
ACCIDENTS**



**SPENDING
LESS MONEY**

“ YOU GET TO SPEND ACTUAL QUALITY TIME WITH YOUR FAMILY THAT YOU WOULD NOT HAVE DONE OTHERWISE. I'VE GROWN SO MUCH CLOSER TO MY KIDS. ”
– **Indian Female, 48 years old**

“ THE BEST AND ONLY GOOD THING ABOUT THE LOCKDOWN WAS BEING ABLE TO SPEND TIME WITH MY SONS. ”
– **Indian Female, 48 years old**

“ WE'VE HAD A LOT OF TIME TO SELF-REFLECT AND DRAW CLOSER TO EACH OTHER EVEN THOUGH WE ARE FAR APART. ALSO, THE CARING HUMAN SPIRIT HAS SHOWN ABOVE THE ODDS. ”
– **Black Male, 31 years old**

“ THE BEST THING THAT HAS HAPPENED IS SAVING MONEY. ”
– **Black Male, 19 years old**

“ IT HAS GIVEN ME A CHANCE TO SPEND MORE QUALITY TIME WITH MY FAMILY. I VALUE EVERY MOMENT. ”
– **White Female, 19 years old**

“ WORKING FROM HOME AS I GET TO SPEND MORE TIME WITH MY SON AND FAMILY - YOU JUST BECOME SO GRATEFUL. ”
– **Black Female, 29 years old**

HOWEVER, THE NEGATIVES HAVE HAD A SEVERE IMPACT ON QUALITY OF LIFE – LOSS OF INCOME BEING THE MOST SIGNIFICANT

WORST THINGS ABOUT THE COVID-19 LOCKDOWN



LOSS OF INCOME



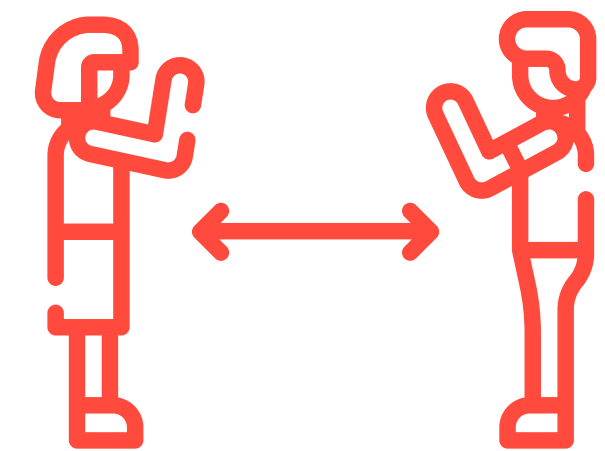
LOSING LOVED ONES



FAILING ECONOMY



HOME SCHOOLING



INABILITY TO VISIT FAMILY

“MY HUSBAND LOST HIS JOB. MY KID IS ASTHMATIC SO HE CAN'T GO OUT AND IT'S SAD BEING CONFINED TO ONE PLACE. ”
– **Black Female, 28 years old**

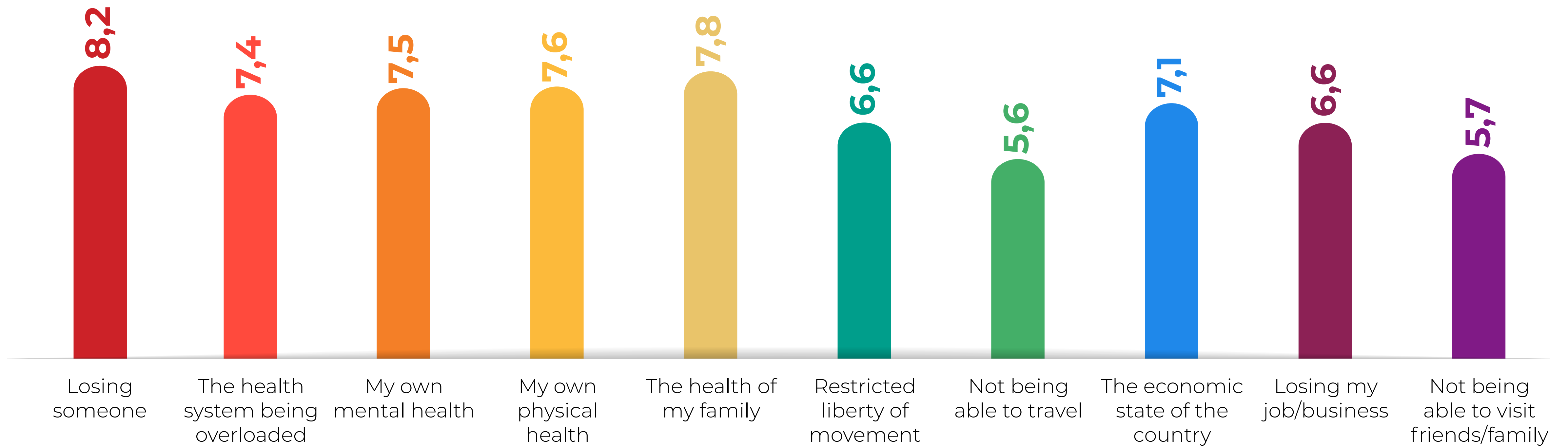
“HOMESCHOOLING AND THE BLURRING OF BORDERS BETWEEN WORK AND HOME. ”
– **Black Female, 37 years old**

“NEGATIVE IMPACT ON THE ECONOMY AND EXPECTED RISE IN LIVING COST ONCE THE LOCKDOWN GETS LIFTED. ”
– **Coloured Male, 24 years old**

“NOT BEING ABLE TO VISIT MY PARENTS, NOT BEING ABLE TO GO TO WORK AND SEE MY STUDENTS. I MISS THEM. ”
– **Coloured Female, 28 years old**

“THE DEVASTATING EFFECT IT IS HAVING ON THE ECONOMY AND PEOPLE'S LIVES. THERE ARE MORE PEOPLE DYING FROM STARVATION THAN WILL DIE FROM COVID-19. ”
– **White Female, 48 years old**

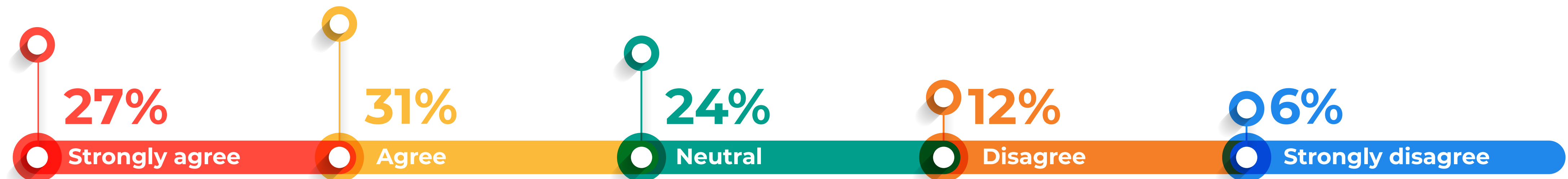
THE BIGGEST CONCERNS OF SOUTH AFRICANS AT THIS TIME INCLUDE LOSING SOMEONE, THE HEALTH OF THEIR FAMILIES AND THEIR OWN MENTAL HEALTH



58% OF SOUTH AFRICANS EITHER AGREED OR STRONGLY AGREED WITH THE GOVERNMENT'S APPROACH TO REDUCING THE SPREAD OF COVID-19.

Q: DO YOU AGREE WITH THE GOVERNMENT'S APPROACH TO REDUCING THE SPREAD OF COVID-19?

AGREE WITH THE GOVERNMENT'S APPROACH TO REDUCING THE SPREAD OF COVID-19

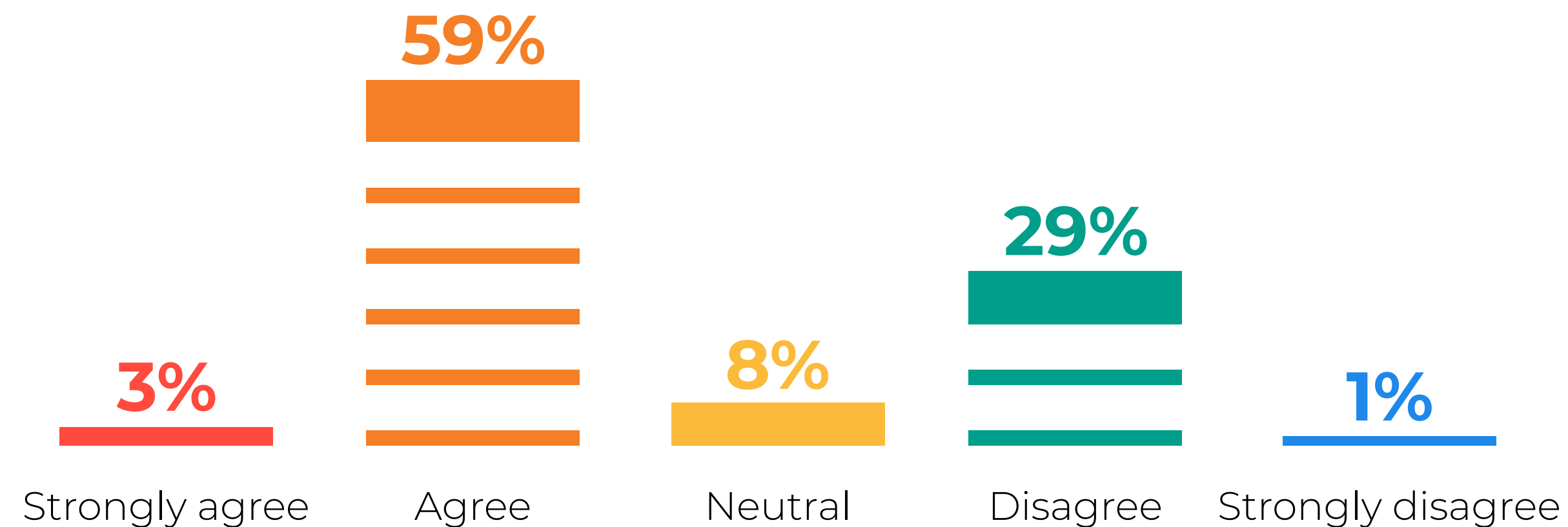


BUT IT'S UNDENIABLE THAT DESPITE FEELING
THAT IT IS THE RIGHT APPROACH, MOST
ARE STRUGGLING DURING LOCKDOWN.

62% SAID THAT THEY FOUND LOCKDOWN TO BE AN EXTREMELY STRESSFUL TIME

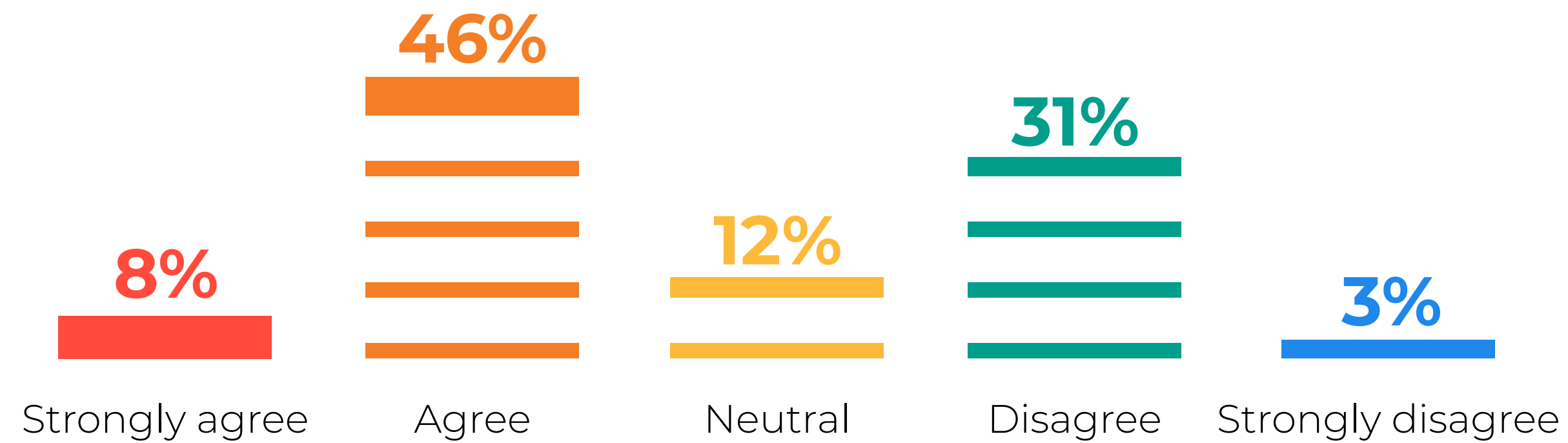
Q: WHEN YOU THINK ABOUT YOUR COVID-19 EXPERIENCE – DO YOU AGREE OR DISAGREE WITH THE FOLLOWING SCENARIOS?

IT'S AN EXTREMELY STRESSFUL TIME

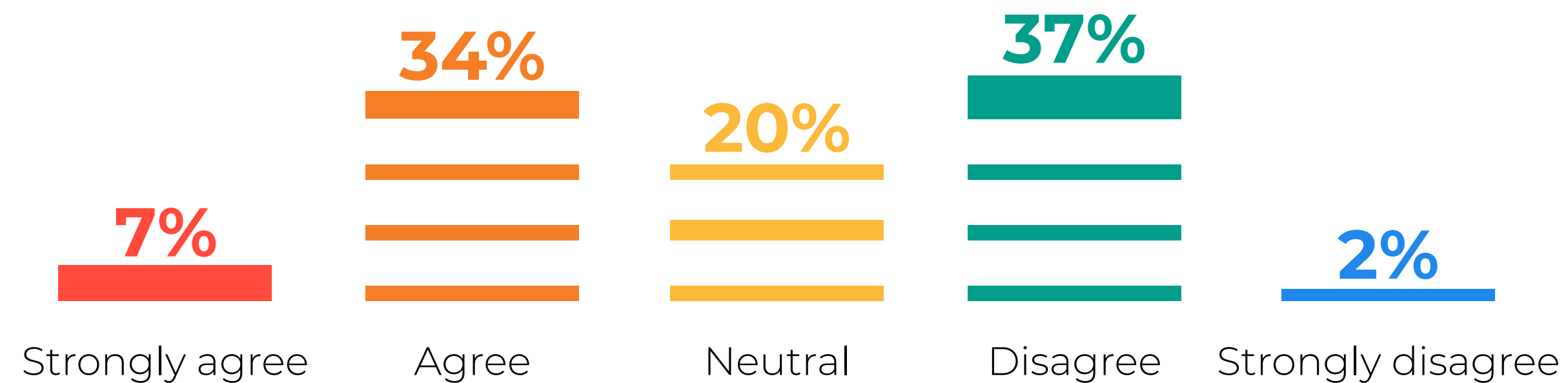


54% SAID THAT THEIR SLEEPING PATTERNS HAVE CHANGED AND 41% ARE FEELING VERY ANXIOUS

MY SLEEPING PATTERNS HAVE CHANGED

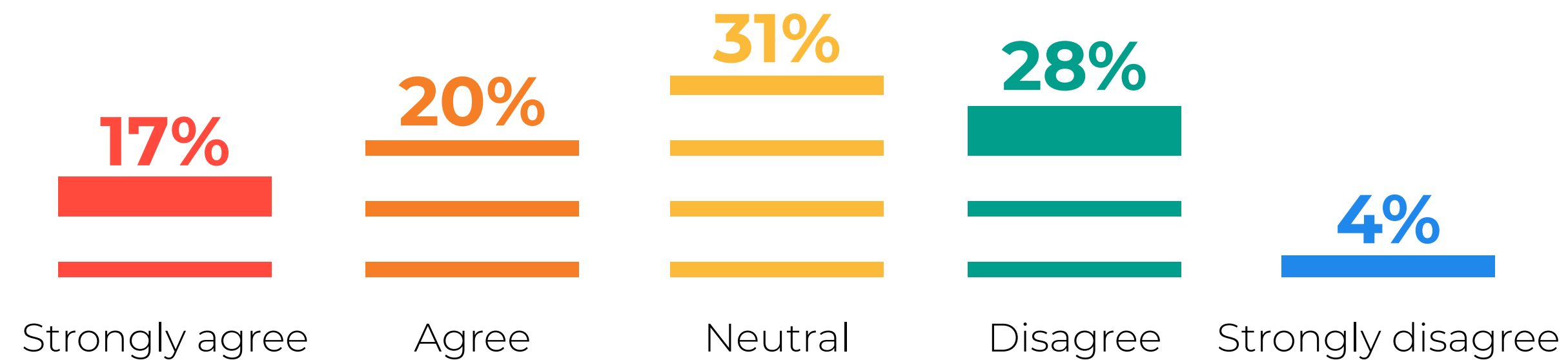


I AM VERY ANXIOUS



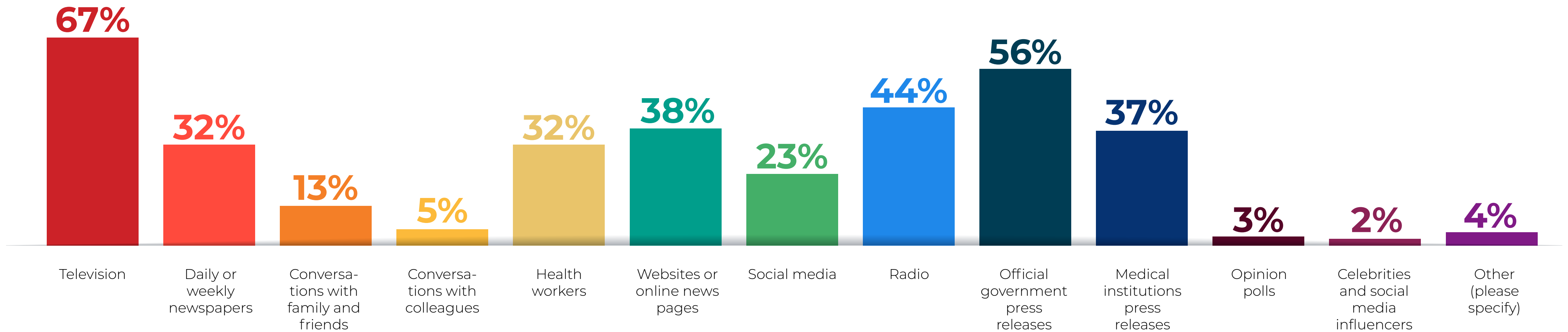
37% INDICATED THAT THEY FOUND IT
HARD TO ADJUST TO LOCKDOWN LIFE

IT'S HARD FOR ME TO ADJUST TO LOCKDOWN LIFE



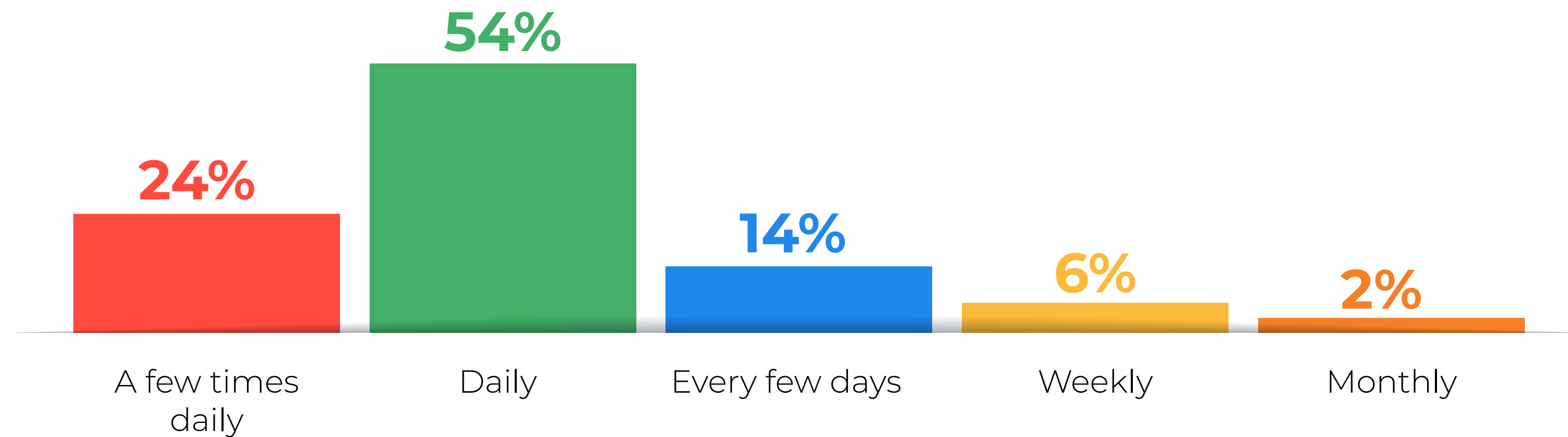
THE MOST TRUSTED SOURCES OF INFORMATION INCLUDE THE TELEVISION, 67%, FOLLOWED BY OFFICIAL GOVERNMENT PRESS RELEASES, 56% AND RADIO, 44%

Q: WHICH SOURCES OF INFORMATION DO YOU TRUST?
MULTIPLE SELECT QUESTION



54% CONSULT THEIR SOURCES OF INFORMATION DAILY

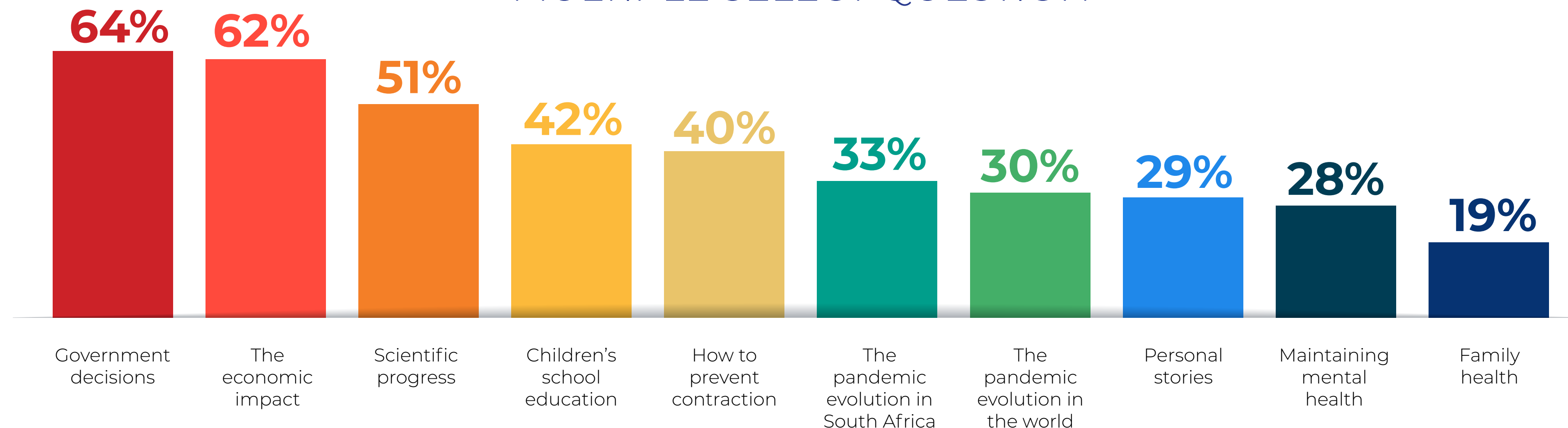
Q: HOW OFTEN DO YOU CONSULT THE INFORMATION SOURCES YOU TRUST TO STAY INFORMED ABOUT COVID-19?



SOUTH AFRICANS ARE MOST INTERESTED IN
GOVERNMENT DECISIONS, 64%, THE IMPACT ON
THE ECONOMY, 62% AND SCIENTIFIC PROGRESS, 51%

Q: WHAT KIND OF COVID-19 INFORMATION IS OF INTEREST TO YOU?

MULTIPLE SELECT QUESTION



“COVID-19 AFFECTS EVERYONES LIFE DIFFERENTLY AND IT HURTS TO SAY BUT THIS LOCKDOWN IS FOR THE BEST TO PREVENT THE SPREAD OF THE VIRUS. I DO ON THE OTHER HAND DISAGREE WITH SOME OF THE DECISIONS GOVERNMENT HAS MADE.”

– Indian, Female, 18 years old

ONLY 24% OF RESPONDENTS
HAVE DISPOSABLE INCOME

Q: DO YOU CURRENTLY HAVE DISPOSABLE INCOME?

DISPOSABLE INCOME

76% No | 24% Yes

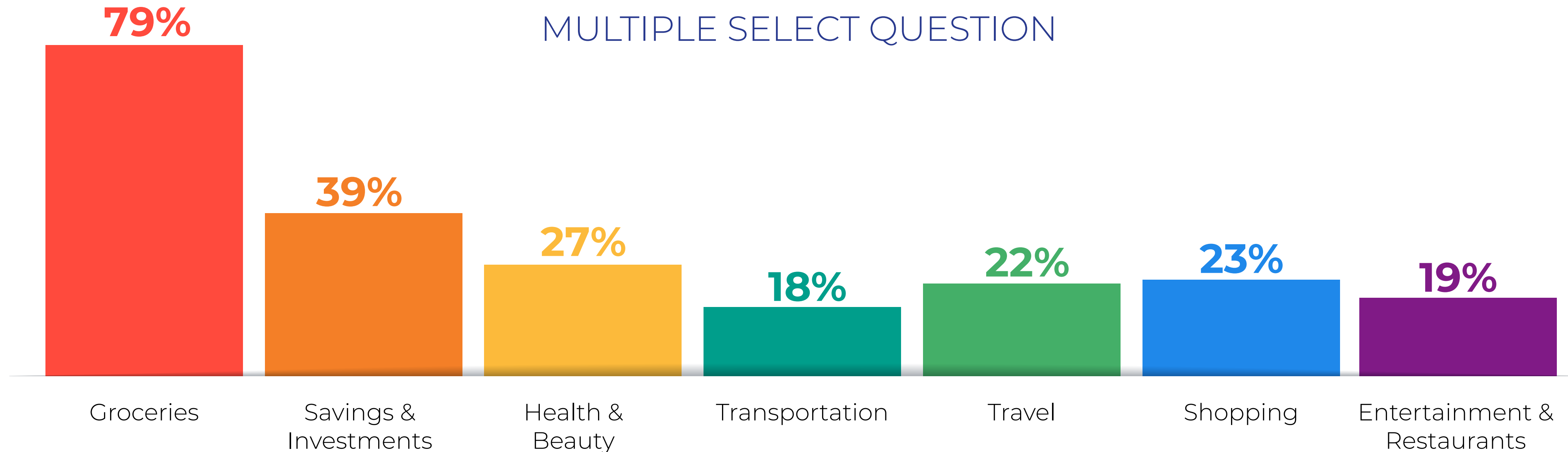
MOST OF WHICH THEY ARE PLANNING ON SPENDING ON
GROCERIES, SAVINGS & INVESTMENTS AND HEALTH AND BEAUTY.

ONLY 22% ARE PLANNING ON SPENDING THEIR DISPOSABLE INCOME ON LEISURE TRAVEL

Q: WHAT WILL YOU SPEND YOUR DISPOSABLE INCOME ON WHEN LOCKDOWN REGULATIONS ALLOW?

SPENDING OF DISPOSABLE INCOME WHEN LOCKDOWN REGULATIONS ALLOW

MULTIPLE SELECT QUESTION



THE TRAVEL DEMOGRAPHIC:

When further analysing which South Africans indicated that they have disposable income we want to understand the demographic makeup of those who indicated that they would be willing to spend on travel. This will help us to understand who who should be targeted for marketing and further research purposes when leisure travel is allowed.

A TOTAL OF **280 SOUTH AFRICANS** WHO PARTICIPATED IN THE SURVEY INDICATED THAT THEY HAD DISPOSABLE INCOME THAT THEY WOULD CONSIDER SPENDING ON TRAVEL WHEN THE REGULATIONS ALLOW

GENDER

45% Male | **55%** Female

RACE

2% Other | **8%** Indian
19% Coloured | **46%** White
25% Black

AGE

6% 18-24 years old
33% 25-34 years old
43% 35-49 years old
18% 50+ years old

EMPLOYMENT STATUS

8% Retired | **2%** Other
8% Employed part-time | **10%** Self employed
68% Employed permanently | **4%** Unemployed

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THANK YOU

Queries? roxanne@capetown.travel



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