CAPE TOWN TOURISM SA CONSUMER REPORT

LOCKDOWN LEVEL 3 INSIGHTS – SEPTEMBER 2020

ONLINE SURVEY: 3-14 AUGUST 2020 | 2562 RESPONDENTS
WHATSAPP FOCUS GROUPS: 10-14 AUGUST 2020 | 18 RESPONDENTS

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BACKGROUND AND OBJECTIVES

1ST CONSUMER REPORT:

CTT SA CONSUMER LOCKDOWN LEVEL 3 IMPACT REPORT INSIGHTS JULY 2020

1st in a series of research to establish the state of willingness to travel amongst South Africans

Consumers have a need for information

Consumers are anxiously cautious which will impact their consideration to travel

Despite there being an established culture of travel, only 5% are willing and able to travel

THE 1ST CONSUMER REPORT HIGHLIGHTED THAT THERE WOULD BE A SMALL PERCENTAGE OF SOUTH AFRICANS WHO ARE WILLING AND ABLE TO TRAVEL.

OBJECTIVES

CTT WANTED TO FURTHER UNDERSTAND:

The demographic of those willing to travel

When they are planning to travel

The considerations when planning a trip

The expectations of the trip experience

Where they are planning to travel and what they are planning to do

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THE RESEARCH APPROACH

An online survey with qualifying criteria published on the CTT social media platforms to ensure a larger percentage of participating respondents who intend travelling.

An online survey published on the CTT social media platforms with qualifying criteria to ensure a larger percentage of respondents who intend on travelling participate.

3 x WhatsApp Focus Groups with a mix of respondents from the Western Cape, Gauteng and Kwa-Zulu Natal.

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DEMOGRAPHICS – ONLINE SURVEY

GENDER

84% Female | **16%** Male

AGE

29% 18-24 years old
37% 25-34 years old
21% 35-49 years old
13% 50+ years old

RACE

1% Asian
34% Black
17% Coloured
10% Indian
36% White
2% Other

EMPLOYMENT STATUS

44% Permanently employed
10% Part-time employed
12% Self-employed
22% Unemployed
3% Retired
9% Other

MONTHLY HOUSEHOLD INCOME

36% Less than R10 000
23% R10 001-R20 000
14% R20 001-R30 000
11% R30 001-R40 000
11% R40 001-R80 000
3% R80 001-R120 00
2% R120 001+

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PROVINCE OF RESIDENCE

36%	Western Cape	13%	Kwazulu-Natal
5%	Eastern Cape	30%	Gauteng
1%	Northern Cape	5%	Limpopo
4%	North West	4%	Mpumalanga
2%	Free State		

WHO WE SPOKE TO – WHATSAPP FOCUS GROUPS

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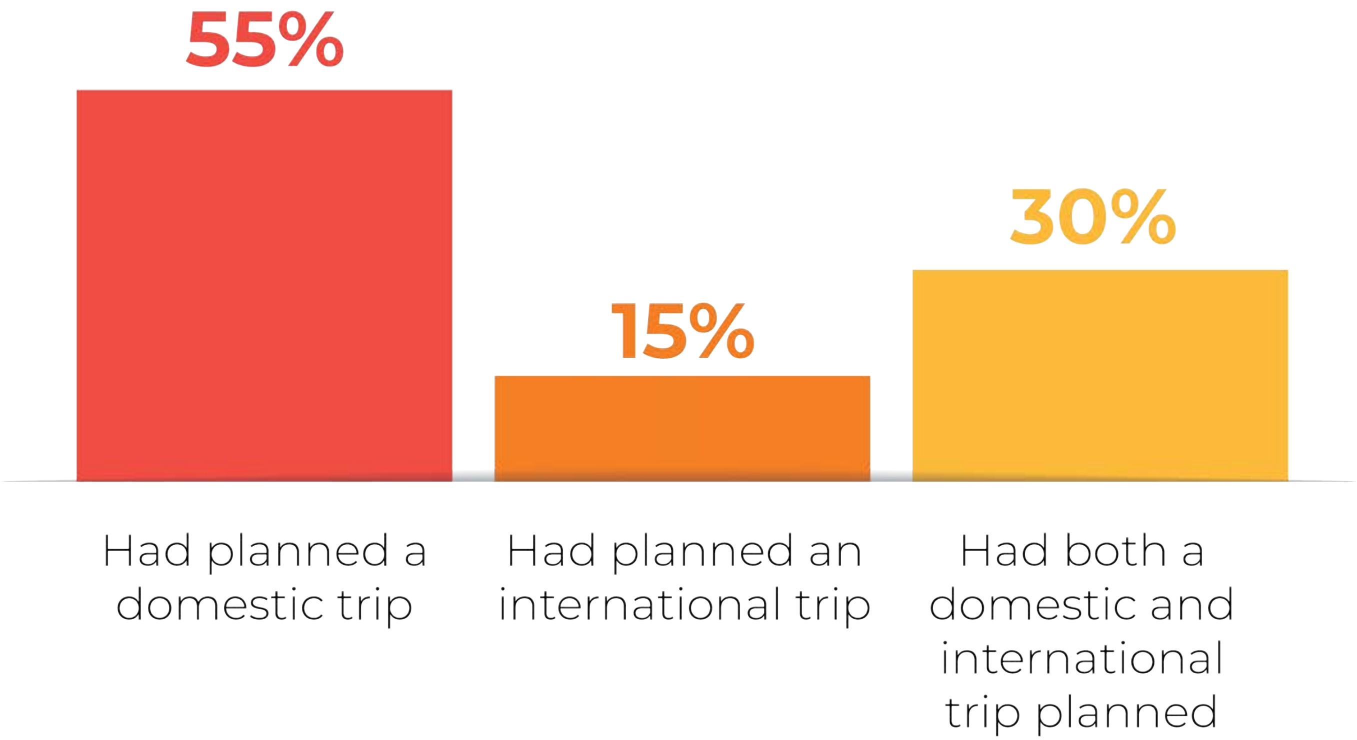
PRIOR TO THE IMPACT OF COVID-19, 91% OF RESPONDENTS HAD TRAVEL PLANNED FOR 2020



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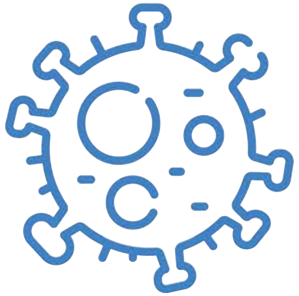
52% INDICATED THAT COVID-19 HAS IMPACTED THEIR APPETITE TO TRAVEL

THOSE WHO WON'T TRAVEL ARE CONCERNED ABOUT:



FEAR OF THE VIRUS

THE FINANCIAL IMPLICATION

TRAVEL RESTRICTIONS

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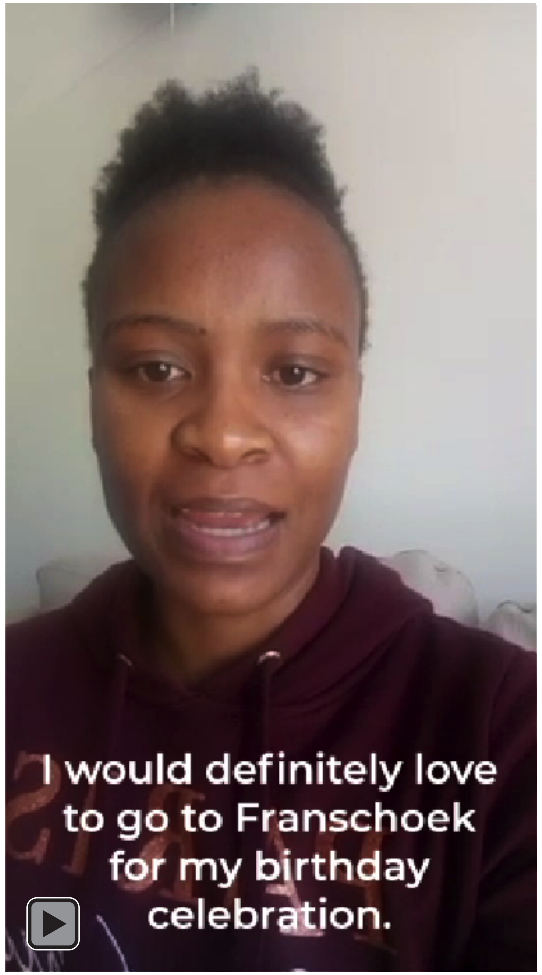
47% WOULD CONSIDER TRAVELLING WITHIN THEIR PROVINCE DURING LOCKDOWN LEVEL 3



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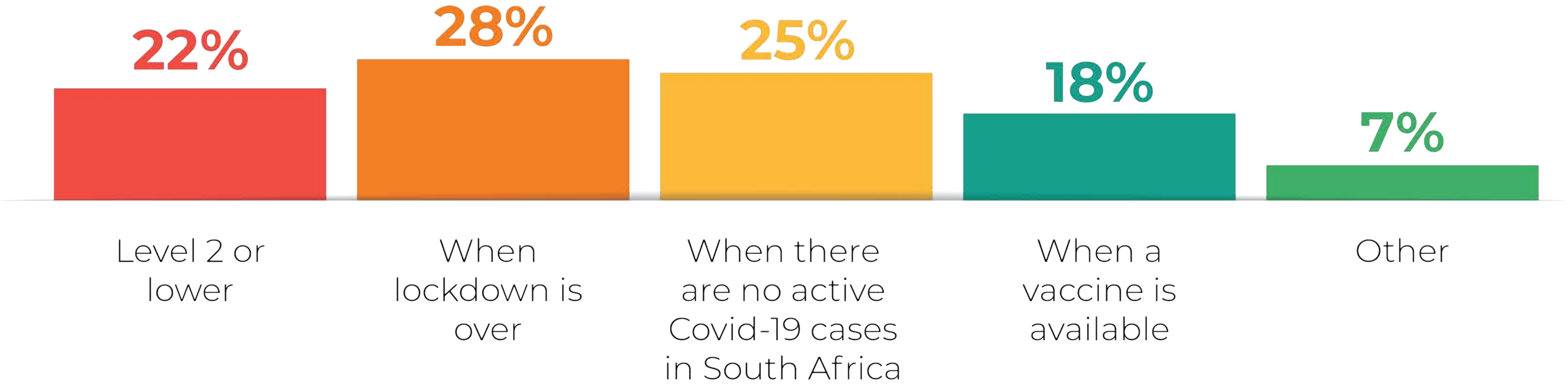
THOSE WHO WOULDN'T CURRENTLY CONSIDER TRAVELLING WILL ONLY CONSIDER IT UNDER THE FOLLOWING CIRCUMSTANCES:



Other: when Covid-19 and lockdown is over, when financially able to, when borders open and international travel resumes.

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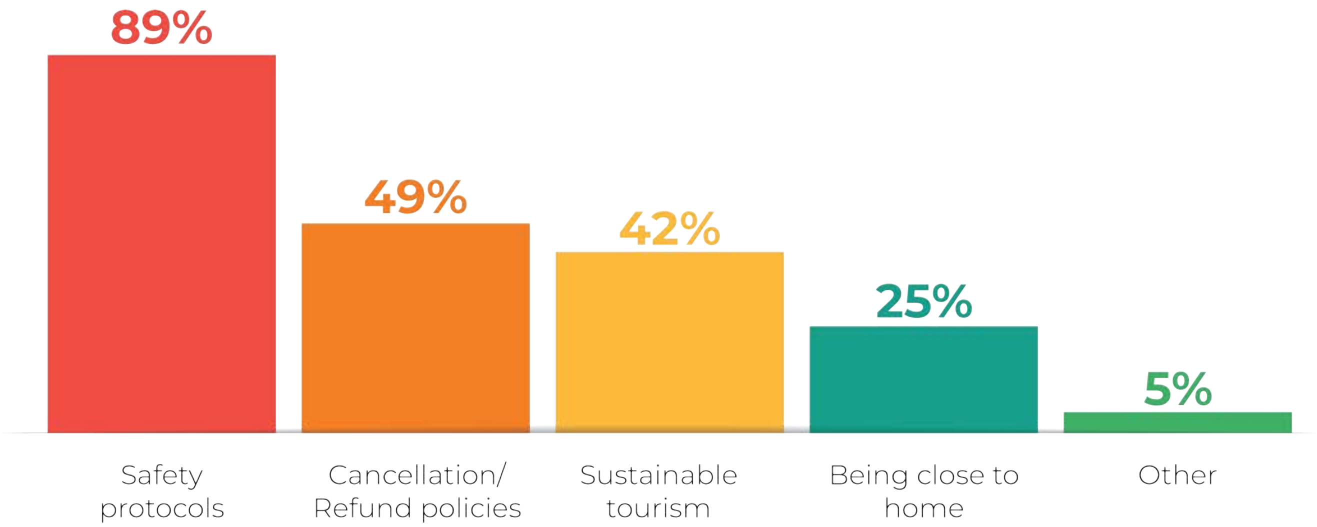
DESPITE A WILLINGNESS OF SOME TO TRAVEL, THERE ARE MANY THINGS THAT CONSUMERS CONSIDER BEFORE MAKING ANY PLANS

Multiple select question

THEY INCLUDE:



Other: number of cases in an area, reasonable pricing, consideration of children, convenience, crime incidents

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MOST ARE INTERESTED IN VISITING THE WESTERN CAPE, FOLLOWED BY KWA-ZULU NATAL AND GAUTENG

Multiple select question

56%	Western Cape	42%	Kwazulu-Natal
25%	Eastern Cape	30%	Gauteng
11%	Northern Cape	13%	Limpopo
10%	North West	28%	Mpumalanga
9%	Free State		

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When the whole
lockdown came about
was kind of bummed

54% WILL TRAVEL FOR LEISURE, 37% WILL VISIT FRIENDS AND FAMILY AND ONLY 3% WILL TRAVEL FOR BUSINESS PURPOSES

6% SELECTED OTHER, INCLUDING: STUDYING, WEDDING AND HONEYMOON, BOTH LEISURE AND BUSINESS AND SPORTING ACTIVITIES

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SOME CAPE TOWN MOMENTS THAT RESPONDENTS ARE EXCITED TO EXPERIENCE AGAIN

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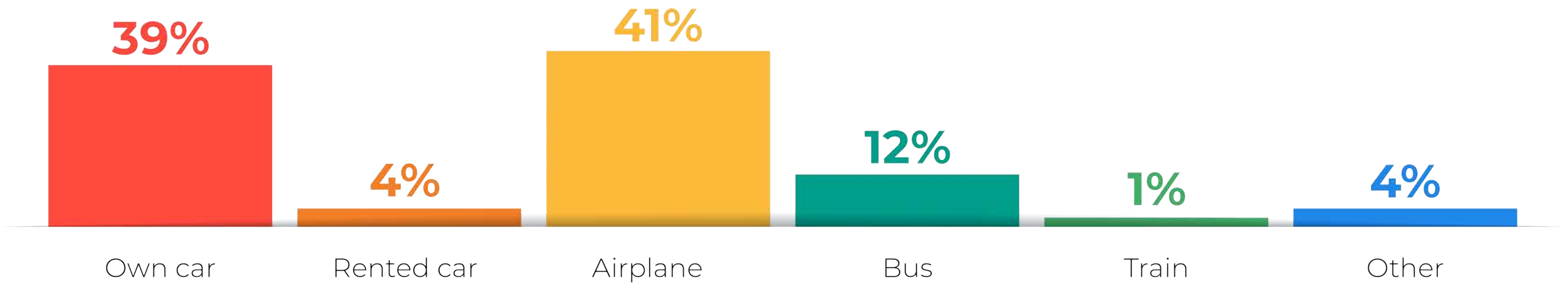
TABLE MOUNTAIN, CAPE TOWN, SOUTH AFRICA.
#TableMountain
Fatima
Mini Market
Coca-Cola

41% WOULD CONSIDER FLYING, FOLLOWED BY 39% MAKING USE OF THEIR OWN CAR



Other: motorcycle, taxi, private driver, mix of transport options

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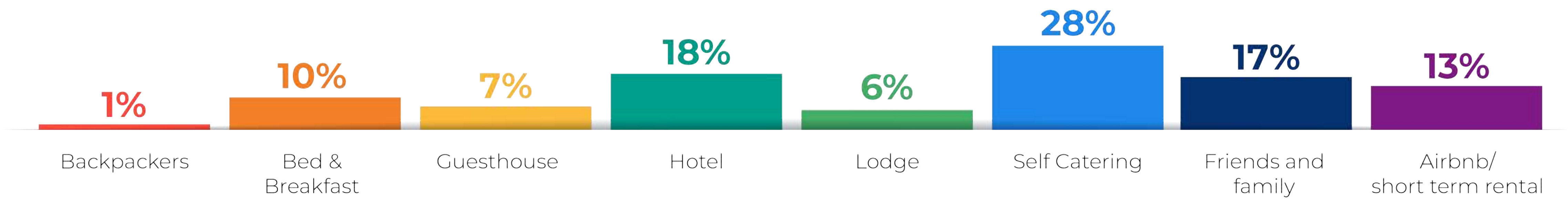
SELF CATERING IS THE MOST POPULAR CHOICE OF ACCOMMODATION WHEN PLANNING A TRIP, FOLLOWED BY HOTELS AND FRIENDS AND FAMILY.



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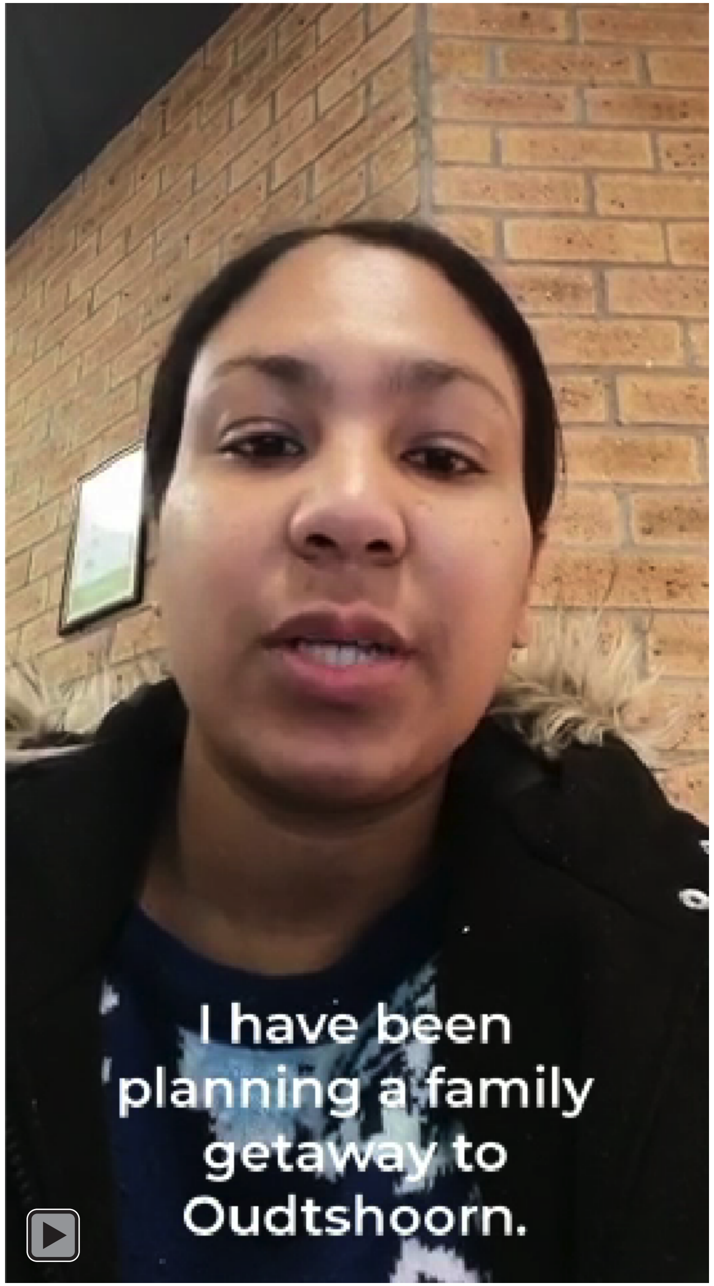

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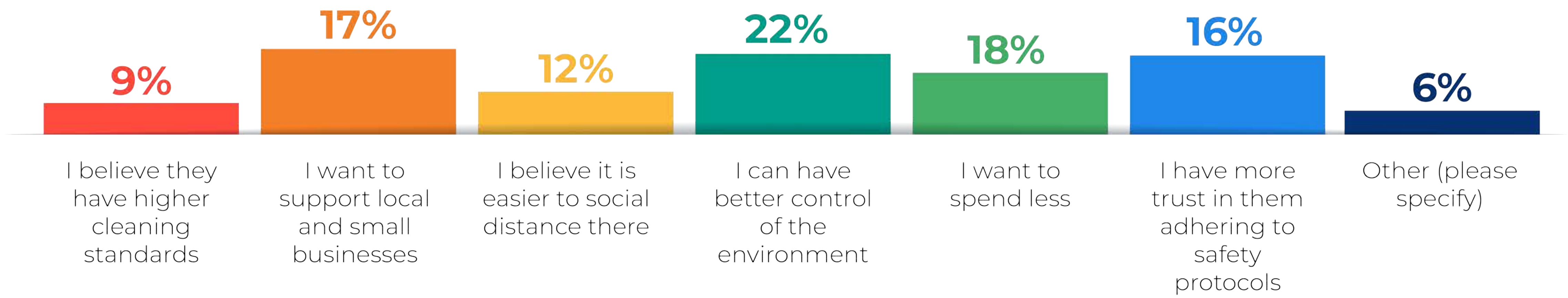
THE CHOICE OF ACCOMMODATION IS LARGELY DRIVEN BY THE ABILITY TO HAVE BETTER CONTROL OF THE ENVIRONMENT



Other: privacy, convenience, ability to do what you want, available service and flexibility

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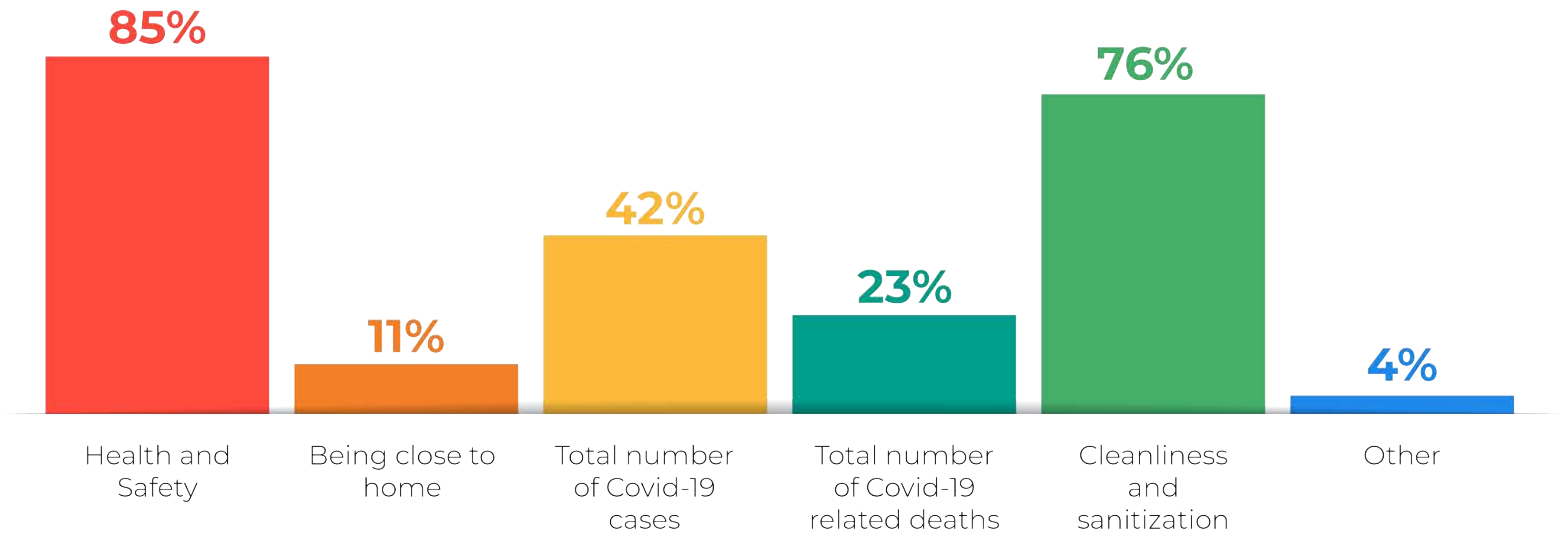
HEALTH, SAFETY, CLEANLINESS AND SANITIZATION ARE TOP OF MIND CONCERNS

Multiple select question



Other: rate of infection, government regulations, quarantine, safety on roads, others adhering to rules, unknowingly spreading, road incidents

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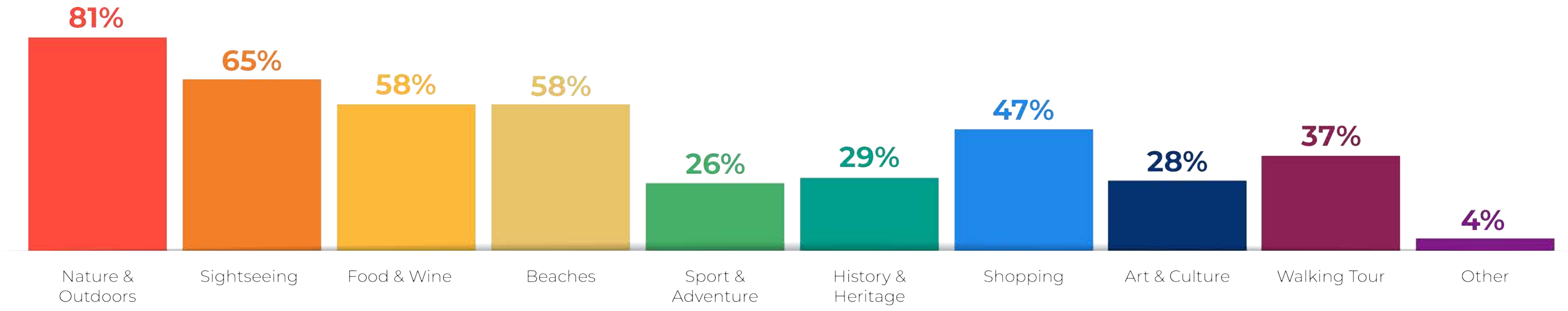
It all depends on the
environment, on the
infection rates,

NATURE & OUTDOORS, SIGHTSEEING AND FOOD & WINE ARE TOP OF THE LIST OF ACTIVITIES THAT SOUTH AFRICANS WOULD LIKE TO PARTICIPATE IN

Multiple select question



Other: spending time with family, child friendly activities, game drives, health and wellness

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KEY TAKEAWAYS

Finances are their biggest concern – generally in their everyday lives and specifically when travelling. Discounts and cancellation policies, specifically the ability to get refunds is very important.

Safety Protocols are top of mind when travelling and businesses need to ensure that they communicate this clearly and visibly.

Being in control of their environment is very appealing especially where it can potentially reduce exposure. Unsurprisingly, self-catering will be the preferred accommodation type and doing activities in nature and outdoors is top of the activity list.

With inter-provincial travel allowed since the 18 August 2020 we hope for a positive turn but understand that there are still barriers to travel and a long road until tourism recovery is achieved.

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