

# PROJECT FESTIVE

SOUTH AFRICAN DOMESTIC CONSUMER  
RESEARCH  
FEBRUARY 2021

Cape  
Town  
TOURISM

With a festive season unlike any prior to 2020, Cape Town Tourism wanted to explore what South Africans had planned over the festive period under the Lockdown Level 1 restrictions, with a particular focus on people who are travelling away from home.

The survey explored travel distances, the activities and attractions included in the holiday itinerary, accommodation plans and budgets.

The survey was deployed during Lockdown Level 1, following the announcement of the shift to Level 3 the survey was closed to avoid feedback inconsistencies.

**OBJECTIVE:** Provide context and insight into the behaviour of South Africans over the December 2020 festive season

**METHODOLOGY:** Quantitative online survey

**FIELDWORK:** 21 – 28 December 2020

**SAMPLE:** 1531 responses: 606 travellers and 925 non-travellers

**DISTRIBUTION:** Distributed by IndigoMO through digital channels



# DEMOGRAPHICS

## GENDER

**70%** Female  
**23%** Male  
**6%** Non-binary  
**1%** Other

## AGE

**10%** 18-24 years old  
**30%** 25-34 years old  
**27%** 35-44 years old  
**15%** 45-54 years old  
**11%** 55-64 years old  
**7%** 65+ years old

## RACE

**33%** White  
**36%** Black  
**19%** Coloured  
**9%** Indian  
**1%** Asian\*  
**0%** Other  
**2%** Prefer not to answer

## ALL PARTICIPANTS RESIDE IN SOUTH AFRICA

The sample consisted of 1531 respondents in total. The intention was to specifically target respondents who had travelled or planned to travel over the December/January holiday season. Demographics occurred naturally with the bulk of the sample being 25-44 years old.

\*Not statistically representative of the South African population

## GEOGRAPHIC DISTRIBUTION

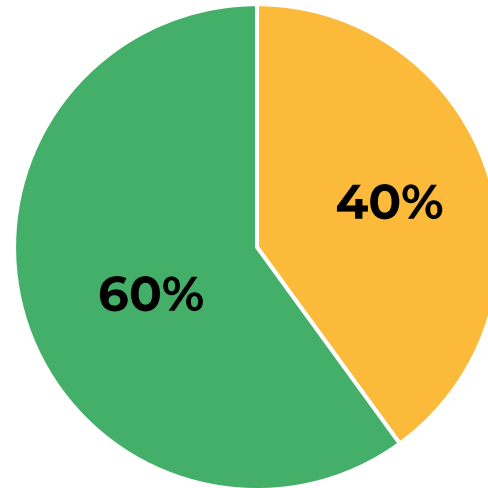
31%	Western Cape	16%	Kwazulu-Natal
5%	Eastern Cape	40%	Gauteng
1%	Northern Cape	2%	Limpopo
2%	North West	1%	Mpumalanga
2%	Free State		



**Note:** In order to qualify to participate in the survey participants had to reside in a province within South Africa. The sample is statistically representative of South Africans residing in Gauteng, Kwazulu-Natal and the Western Cape.

# 40% OF THE SAMPLE INDICATED THAT THEY WERE GOING AWAY

**Are you going away at all this holiday/festive season?**



■ Yes ■ No

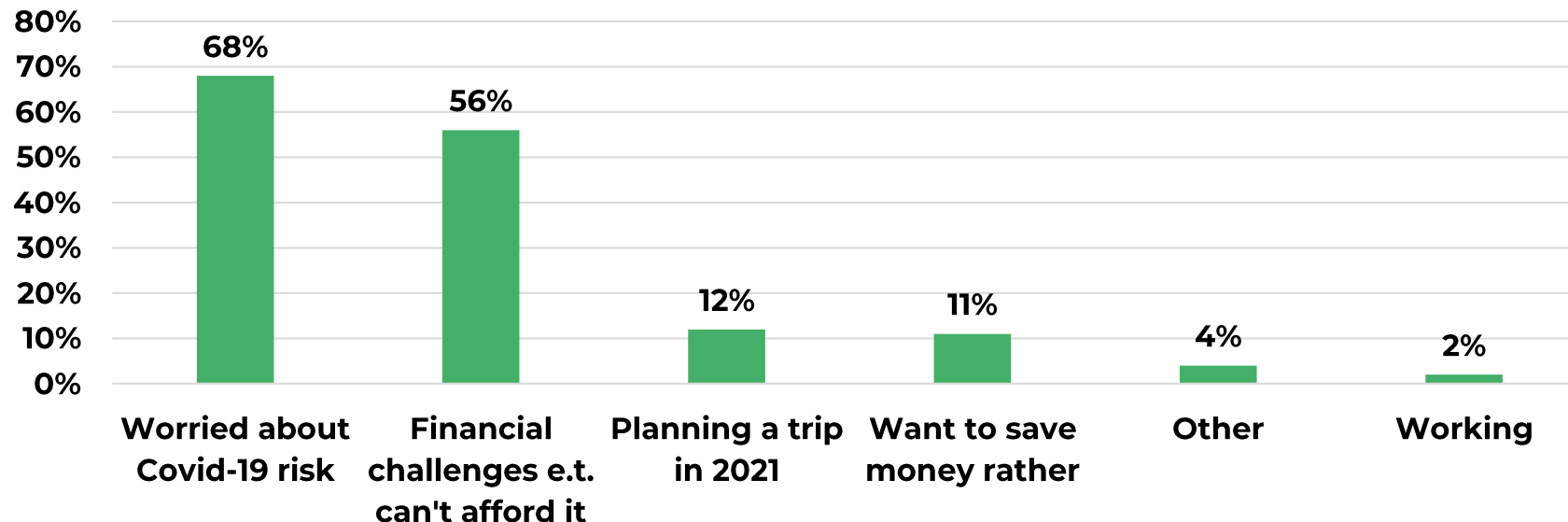
In the Level 1 phase of lockdown, it was evident that the majority (60%) of respondents did not intend to go away during the 2020 holiday season. Although this time of the year is traditionally the season for travel, only 40% of respondents had plans to go away. This is indicative of the impact of the Covid-19 pandemic on South Africans.



# NON-TRAVELLER FEEDBACK

**68%** INDICATED THAT THEY WOULD NOT BE TRAVELLING AS THEY WERE WORRIED ABOUT THE RISK OF COVID-19

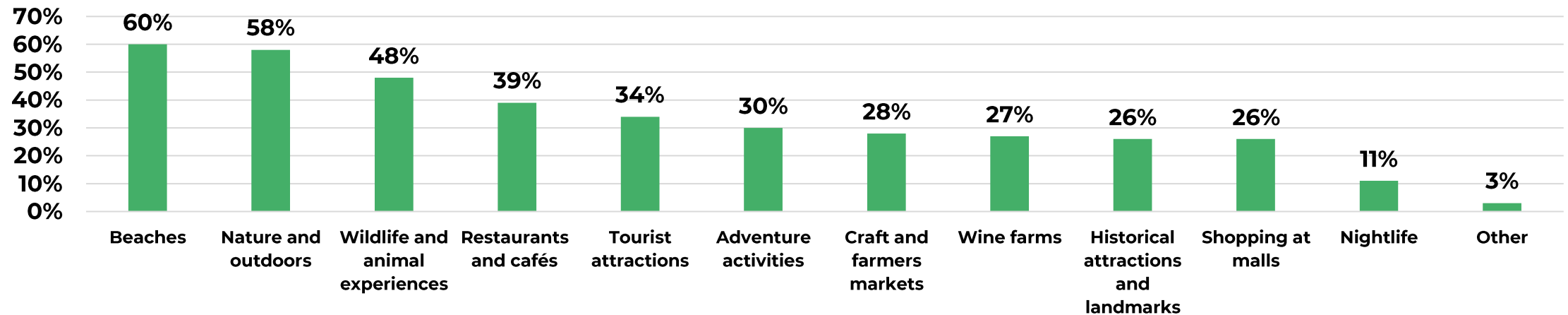
**Please will you share with us why you are not going away over this year's festive period? (Multiple Select)**



The severe impact of Covid-19 on the economy has negatively affected the financial wellbeing of South Africans (56%). The pandemic has not only left South Africans without disposable income but has also resulted in the need to save in order to rebuild future financial reserves (11%) driven by the fear of another hard lockdown and the unpredictability of what lies ahead.

# MOST WILL CONSIDER BEACHES, NATURE AND OUTDOORS AND WILDLIFE AND ANIMAL EXPERIENCES WHEN THEY TRAVEL AGAIN

When you are ready to travel again, what kind of experiences will you consider including in your trip?



After nearly a year of isolation and “stay at home” messaging there is a big desire to have outdoor experiences. Not only do these attractions provide a sense of reconnecting with nature, the desire comes with an innate sense of relaxation and rejuvenation to contrast the stress and anxiety caused by the pandemic. Typically crowded activities such as shopping malls and nightlife were among the least frequently selected, showing a potential medium term hesitation around densely populated experiences.



# TRAVELLER INSIGHTS

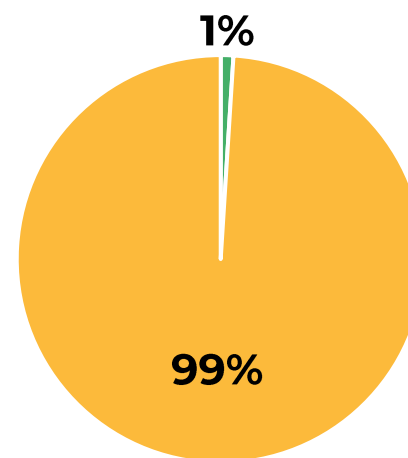


# 99% INTEND ON TRAVELLING LOCALLY

Are you going to be travelling locally or internationally this summer holiday?



Roughly 70% of the international trips indicated were to destinations on the African continent, while only approx. 30% were overseas destinations.

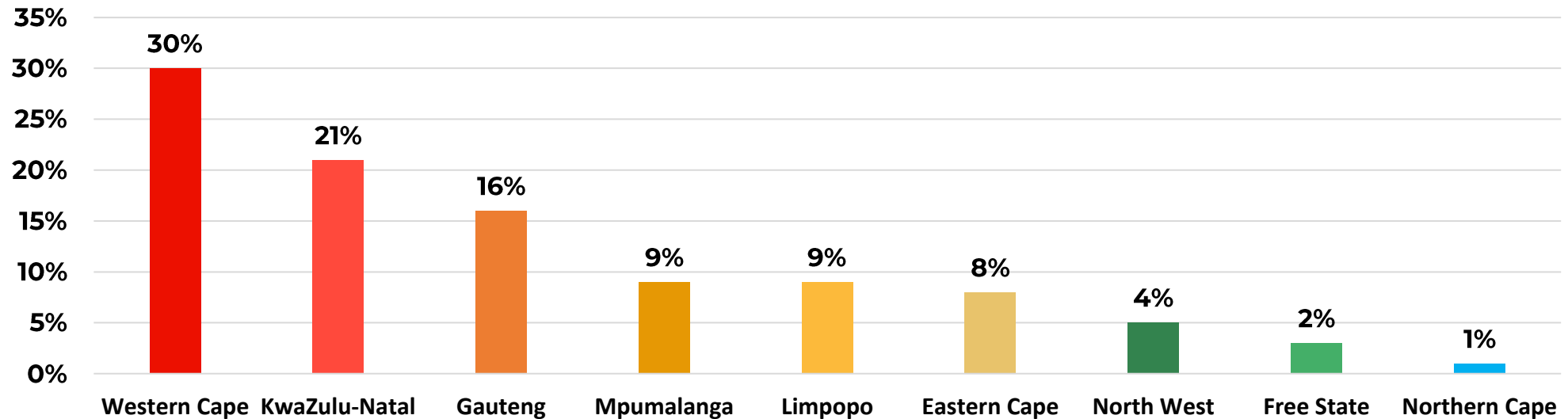


■ Internationally ■ Domestically

Of the 1% that indicated international travel, the majority indicated continental travel intentions (e.g. Mozambique, Swaziland, Zimbabwe) with overseas travel being scarce. This could be linked to limited finances and hesitation around the risk associated with long-haul flights as well as constant changes to travel regulations.

# WESTERN CAPE, KWAZULU-NATAL AND GAUTENG ARE THE TOP TRAVEL DESTINATIONS

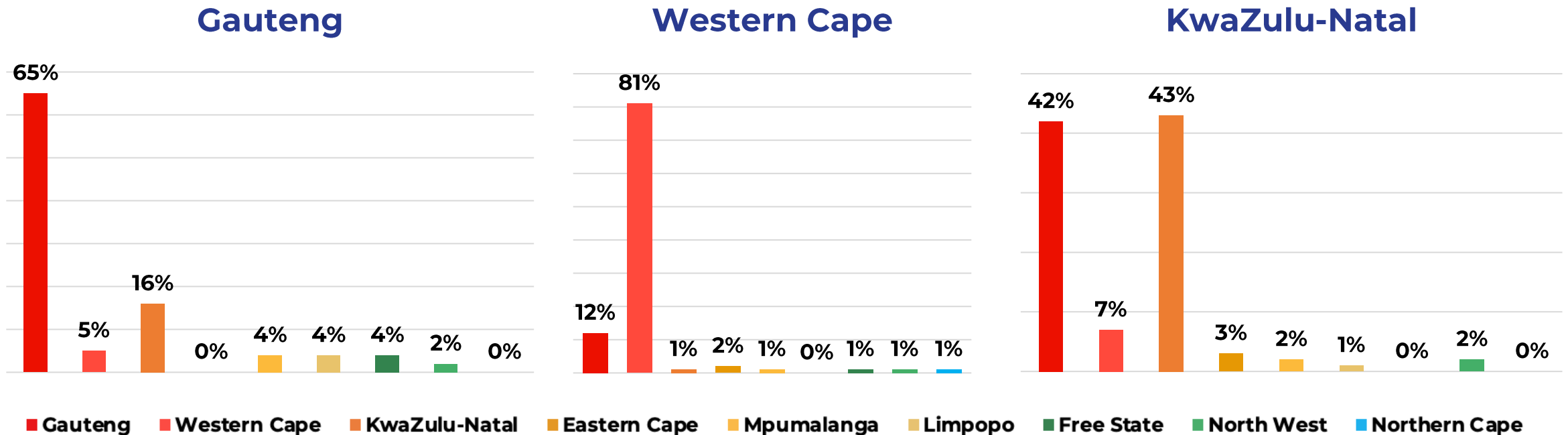
To which province will you be travelling within South Africa?



The Western Cape (30%) was the most frequently selected travel destination, followed by KwaZulu-Natal (21%). These two coastal destinations are popular for their climate, beaches and family-friendly activities. A notable portion selected Gauteng (16%). Visitors to these top three destinations will be used in key charts for comparative purposes to explore how travellers within each of the most popular destinations differ in their planning and behaviour.

# KWAZULU-NATAL ATTRACTED THE MOST SOUTH AFRICANS FROM OUTSIDE OF THE PROVINCE

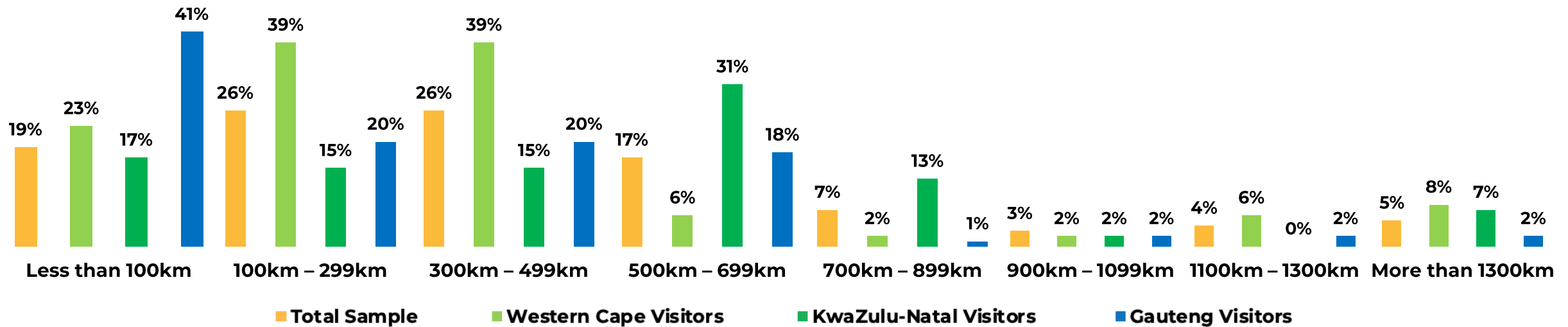
To which province will you be travelling within South Africa?



To understand the movement, the top three provinces for travel were isolated to determine where travellers reside. Whilst the Western Cape was the most popular travel destination, 83% reside in the province. The next biggest domestic source is Gauteng (12%). KwaZulu-Natal attracted visitors from Gauteng (42%) and the Western Cape (7%).

# JUST UNDER HALF (45%) OF THE SAMPLE INDICATED THAT THEY WILL BE TRAVELLING LESS THAN 300km TO REACH THEIR DESTINATION

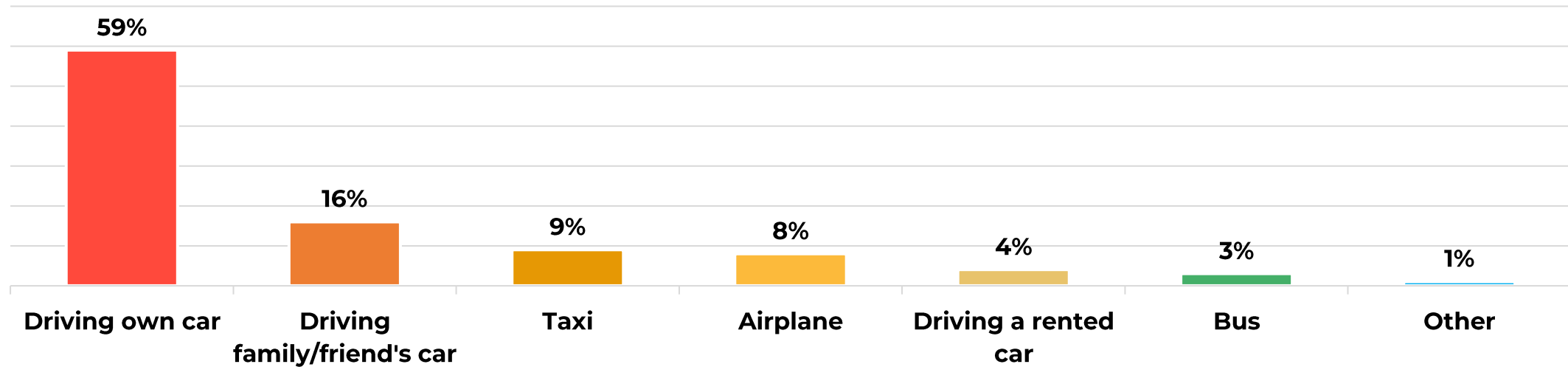
Approximately how many Km away from your home will you be travelling this holiday?



In the minority are those traveling 700km or more (19%). Of those travelling to Kwazulu-Natal, a substantial portion (31%) would travel between 500km-699km to reach their destination as many of the KZN visitors were based in Gauteng. Due to the Western Cape's source location being residents within the province, locals have a sense of being far enough from home to be classified as a getaway despite remaining within the province where they reside. Gauteng visitors travelled an even shorter distance on average, with 41% indicating that they will be travelling less than 100km.

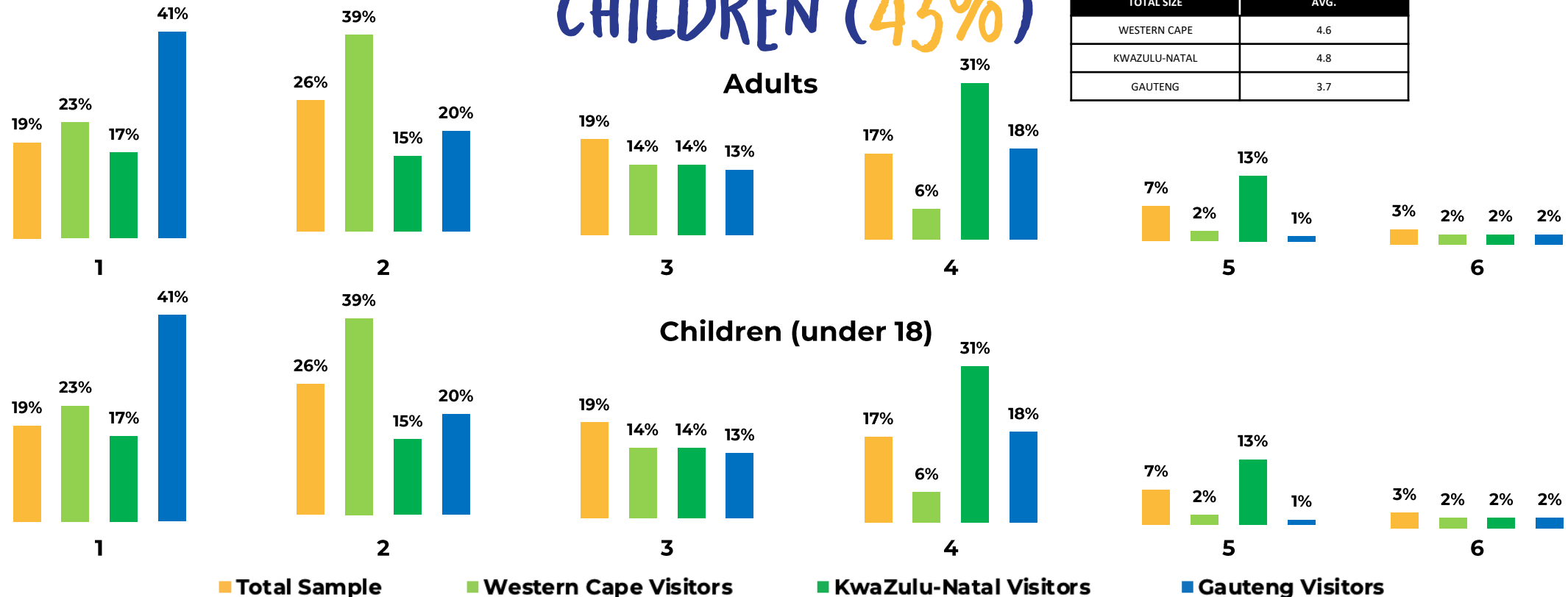
# TRAVEL BY CAR (79%) WAS THE MOST COMMON MODE OF TRANSPORT

What is the main form of transport that you will be using to arrive at your destination?



While most used their own personal vehicle (59%) a substantial number of respondents also travelled in a vehicle owned by friends or family (16%) and a much smaller portion in a rented vehicle (4%). The lesser number of respondents travelling via taxi, airplane and bus could be attributed to the higher risk of Covid19 exposure associated with using one of these modes of transport where travellers share space with strangers for long periods of time with limited ventilation.

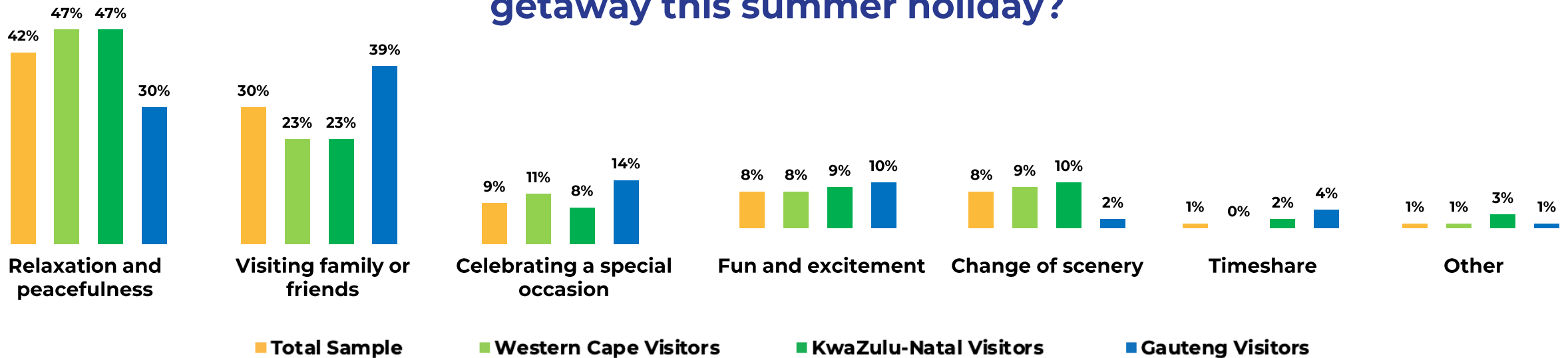
THE TOTAL SAMPLE INDICATES THAT THE MOST COMMON TRAVEL PARTY IS MADE UP OF TWO ADULTS (44%) AND NO CHILDREN (43%)



The majority of travellers made use of vehicles as a primary mode of transport, which would naturally result in smaller travel parties due to space limitations. As a whole, Gauteng visitors tended to have substantially smaller travel parties vs. Western Cape and Kwazulu-Natal, suggesting that Gauteng is less family/group friendly than coastal regions.

# FOR THE MAJORITY (42%) RELAXATION AND PEACEFULNESS WAS THE MAIN MOTIVE TO PLAN A GETAWAY OVER THE FESTIVE SEASON

## What is the main reason motivating your getaway this summer holiday?

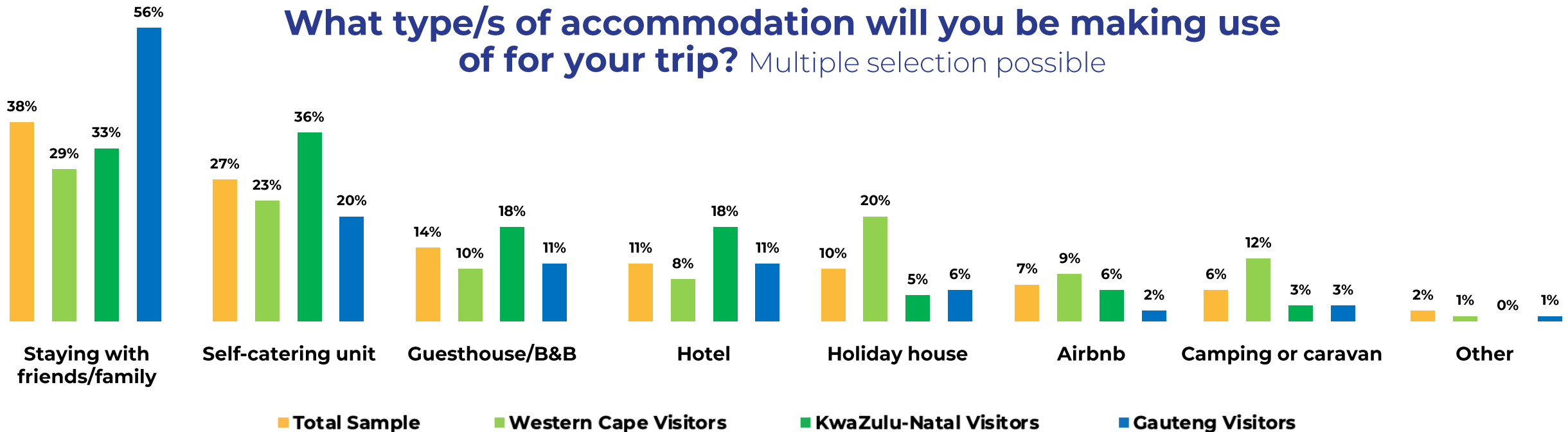


With the Covid-19 lockdown restrictions calling for social distancing and limiting travel for a large portion of the year, many people had not had the opportunity to connect with their loved ones during 2020, making visiting family or friends the second most common priority, as indicated by 30% of the sample. Interestingly,

Gauteng visitors were outliers among the top three destinations. The most popular reason to travel to Gauteng was to visit family and friends (39%), while relaxation and peacefulness was second most popular (30%). This may indicate that Gauteng is not typically positioned in the minds of South Africans as being a destination for relaxation.

# 38% OF THE TOTAL SAMPLE INDICATED THAT THEY WILL BE STAYING WITH FRIENDS AND FAMILY

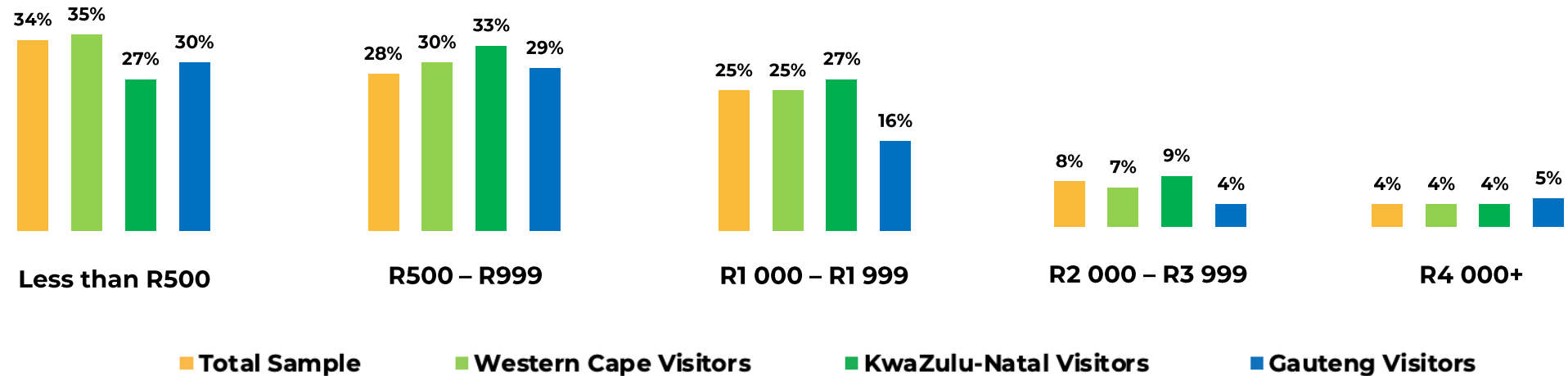
## What type/s of accommodation will you be making use of for your trip? Multiple selection possible



The next most common accommodation type was that of Self-catering (27%) which aligns with South Africans being increasingly cost conscious and wanting more control of their environment. Guesthouses and Hotels were the accommodation types chosen by 25% of the total travelling sample, and tended to be the most popular among visitors to KwaZulu-Natal. 20% of visitors to the Western Cape made use of Holiday Houses while a further 12% intended to Camp or Caravan, both of which were significantly more common in frequency when compared to visitors to Gauteng or KwaZulu-Natal.

# THE MAJORITY INDICATED THAT THEY HAVE A BUDGET OF LESS THAN R500 TO SPEND ON ACCOMMODATION PER DAY

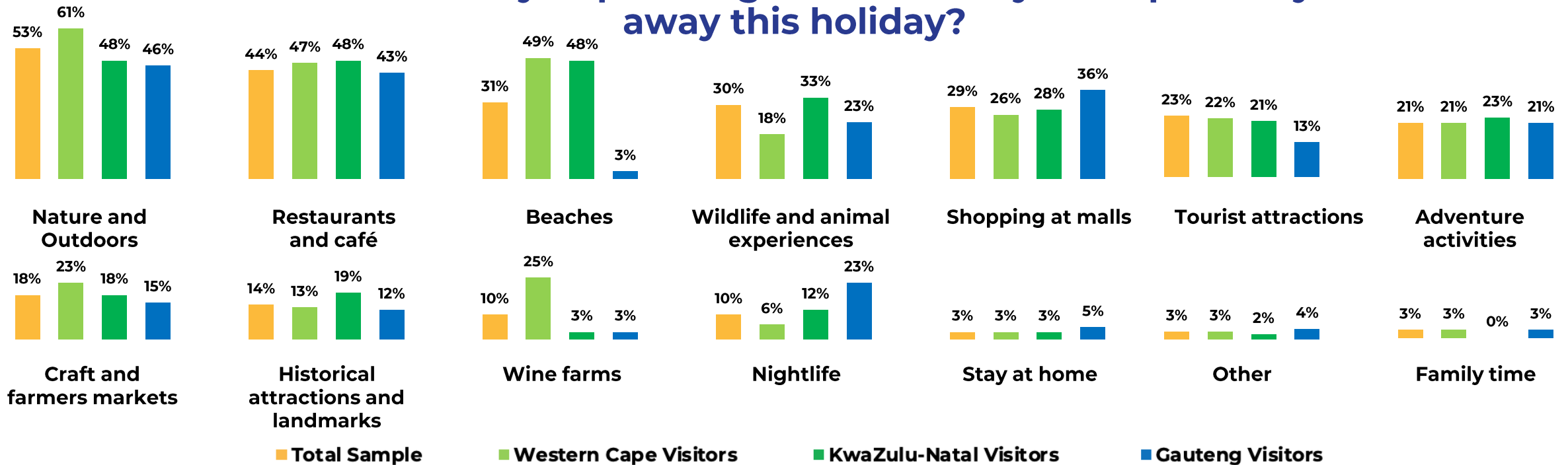
What is your average budget per day for accommodation?



56% of Gauteng visitors indicating that they would be staying with Friends and Family correlates with the significantly higher percentage of Gauteng visitors spending less than R500 per day on accommodation. Visitors to KwaZulu-Natal were skewed towards having a higher budget for accommodation which correlates with the feedback that most were going to use paid for accommodation options (self-catering, guesthouses and hotels). Visitors to the Western Cape had the greatest spread of accommodation types selected but Guesthouses and Hotels were among the least mentioned, correlating with Western Cape visitors' accommodation budget.

# UNSURPRISINGLY, THE MOST POPULAR ACTIVITIES AMONG THE TOTAL SAMPLE WERE NATURE AND OUTDOORS (53%)

What activities are you planning to include in your trip while you are away this holiday?

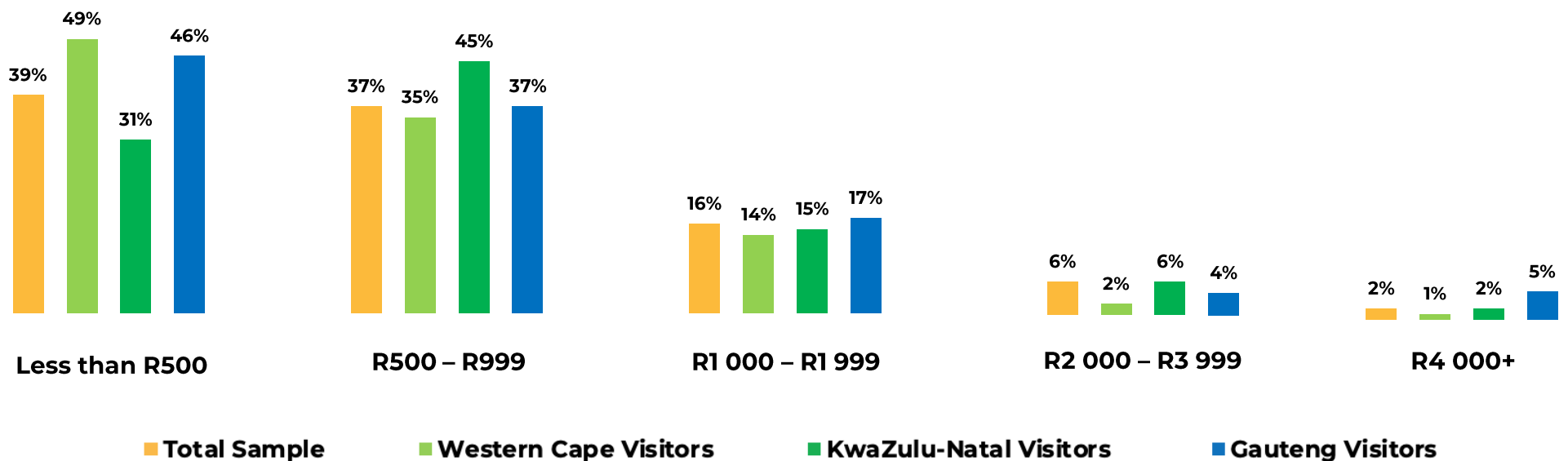


44% of the total sample selected Restaurants and Outdoors (53%) as a chosen holiday activity, showing a positive shift towards feeling comfortable enough to eat out after the hard lockdown. Beach going was the third most popular activity (31%), largely due to two of the top destinations being coastal. Notably, KwaZulu-Natal visitors were most likely to include Wildlife and Animal experiences (33%) while 36% of Gauteng visitors intended to visit shopping malls. Craft and Farmers Markets (23%) and Wine Farms (25%) were popular amongst Western Cape visitors vs. visitors to the other two top destinations.

n = 606

# 76% OF THE TOTAL SAMPLE INDICATED THEIR AVERAGE BUDGET FOR ACTIVITIES AND FOOD TO BE UNDER R1 000 PER DAY

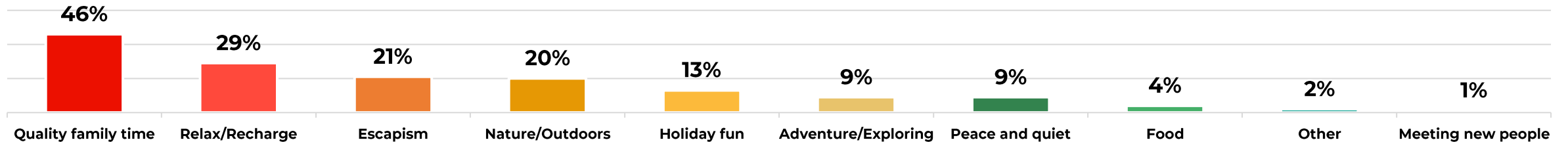
What is your average budget per day for activities and food?



Visitors to the Western Cape were the most likely to spend less than R500 per day. Travellers to the Western Cape were most likely to include activities in categories such as Nature and Outdoors as well as Beaches, both of which are most often free or low cost. Among visitors to the top three destinations, those travelling to the Western Cape were least likely to go to Shopping Malls or to participate in Nightlife, both of which are traditionally associated with higher spending behaviour. Visitors to KwaZulu-Natal displayed a marginally higher interest in activities such as Restaurants, Wildlife and Animal experiences. The moderate spending indication among Gauteng visitors could again be linked to the travel motive being to visit family and friends.

THE FESTIVE SEASON IS TRADITIONALLY TIME FOR FAMILY,  
HOWEVER FOLLOWING THE LOCKDOWN ISOLATION THE OPPORTUNITY  
TO SPEND QUALITY TIME WITH LOVED ONES WAS HEIGHTENED FOR  
MANY (46%)

What about this holiday are you looking forward to most? (Open-ended)



The limitations of activities due to the lockdown restrictions and Covid-19 protocols almost forced South Africans to use the holiday as a time to relax and recharge (29%). 21% of participants revealed that they were looking forward to a sense of “escapism” with many saying that they need to get away, to leave everything behind, to have a change of scenery and escape the stress and fears of day-to-day life. The ability to go to a place where nature and the outdoors could be appreciated was a highlight for 20% of travellers, e.g. walks, sunsets, beaches, swimming pools, beautiful scenic views, being in the bush, etc. The sense of “fun” and “adventure” was less prevalent despite being a usual feature of Summer holidays, this was likely due to the limiting of social interaction and “stay at home” messaging as well as the shift in mindset towards a more introspective and family focussed attitude.

ACROSS ALL THE RESPONSES, THE THREAD OF WANTING A BREAK FROM THE PANDEMIC AND THE DAY-TO-DAY REALITY OF THEIR DOMESTIC LIVES WAS CLEAR - THEY ARE LONGING FOR A BREAK AND A CHANGE OF SCENERY

## What about this holiday are you looking forward to most? (Open-ended)

My holiday is at a remote spot on the beach. Being removed from the crowds, closer to nature and eating delicious food is a real treat after spending all year in a city.

Getting away from home. Relaxing, spending quality time with friends. Recharging for the new work year.

Peace, quiet, the tranquillity of hearing the night animals and early morning birds, seeing wildlife at its best.

Relaxation, peacefulness. Away from work, away from responsibilities, just time to reflect and relax with my partner.

Eating and drinking with family and friends. Fresh food, lovely local wine.

Spending time away from doing the now normal, i.e. staying at home but also just to relax, unwind and leave the stress of work and school behind just for a little bit.

Bring with friends and family. Few things are more important than that. Also looking forward to outdoor braais in the veld – it's a nice escape from busy city living.

Spending time with my family away from home for the first time. Especially travelling for more than 150km.

The idea of being away from Johannesburg is fun. I spend all year there and change of scenery is always exciting. Also, the aspect of meeting new people is nice.

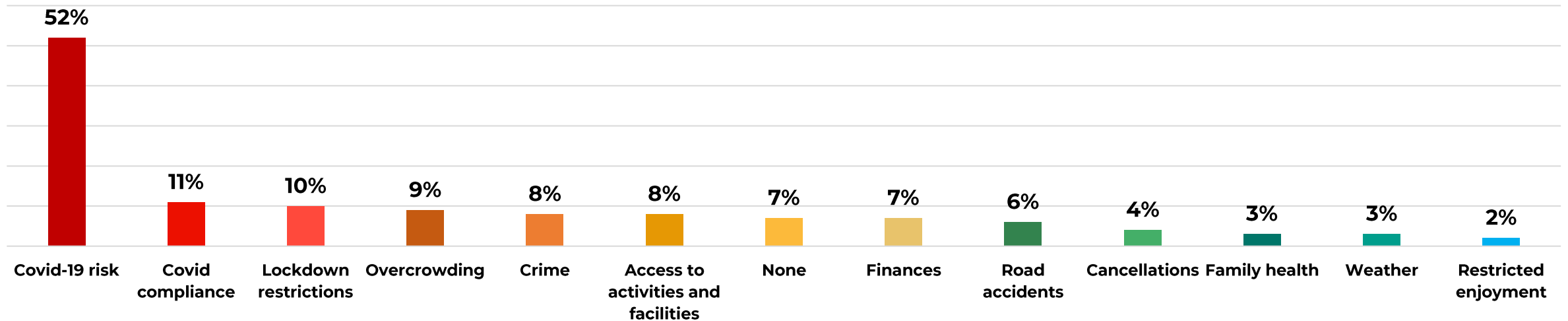
The sense of taking a break away from home after a tough year we had because of the pandemic, so there's no better way to end a year in a different province with my family.

Getting away, relaxing and moving away from busy, technology driven life.

After a stressful year, we need a break. We need to forget about our worries and feel 'transported' as well as to experience some new sights.

# AS ANTICIPATED, THE RISK POSED BY COVID-19 (52%) WAS THE MAIN CONCERN OF TRAVELLERS ACROSS THE SAMPLE

What is your biggest concern about your holiday? (Multiple-select)



11% of participants were gravely worried about being surrounded by people who would not comply to Covid prevention regulations (e.g. not washing hands, sanitizing, wearing masks or maintain a distance). A further 10% were concerned that the Lockdown restrictions would negatively impact their ability to enjoy their time away due to implications of the curfew, closure of beaches in some areas, limitations at entertainment facilities, and fears of changes to restrictions that could prevent travel back home. Despite Covid being an overshadowing concern, travellers additionally conveyed traditional concerns of crime (8%) and road accidents (6%).

# AND IT WAS REITERATED IN THE COMMENTS

## What your biggest concern about your holiday?

My first concern is being infected by the virus. Safety and protection, I want to feel protected everywhere I go so that I can truly enjoy myself and not have to worry.

My main concern was to stay safe but also have fun. I am concerned that people should not be irresponsible by NOT using sanitizer and masks or even social distance.

Driving is not very long but you need to be weary of drink drivers this time of the year as I know the hospitals are full.

The biggest concern is being safe. I am concerned about crime, i.e. pickpocketing, car theft, cellphone theft, loss of property and safety for my being.

That Covid-19 and Uncle Cyril is going to cancel my trip.

My biggest concern is if the place that I am going to is safe?

Being infected while away or inter-provincial borders being closed, preventing us from getting home.

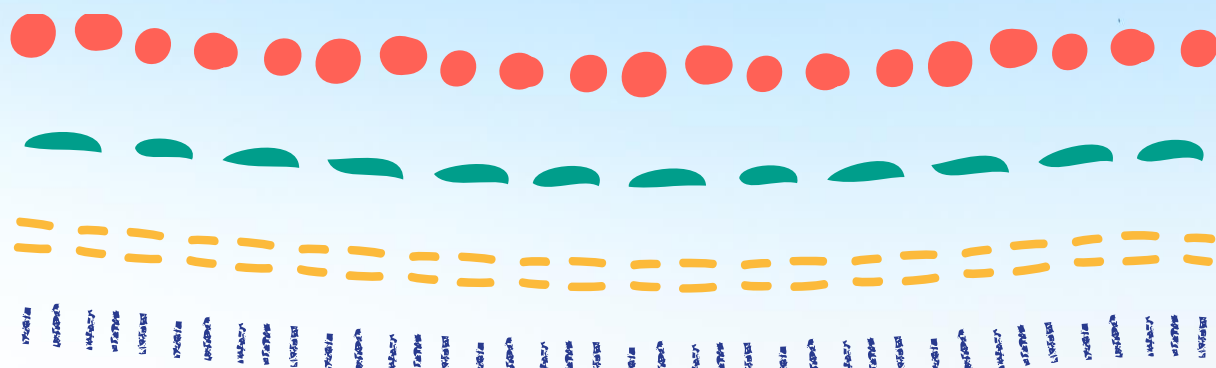
My biggest concerns include the spreading of the virus which may limit us in doing some of the usual activities which we ought to do when we are on holiday.

My concern is the volume of people bring at the same place at the same time. I'm afraid of the virus.

Getting the virus and having to stay indoors. Things have also become expensive over this period, we have to spend wisely – running out of money is always a concern.

Getting into contact with people who are infected and don't comply with the rules and regulations put in place by the government.

Weather – most of our holiday depends on summer weather so we could be quite limited in what we could do and enjoy.

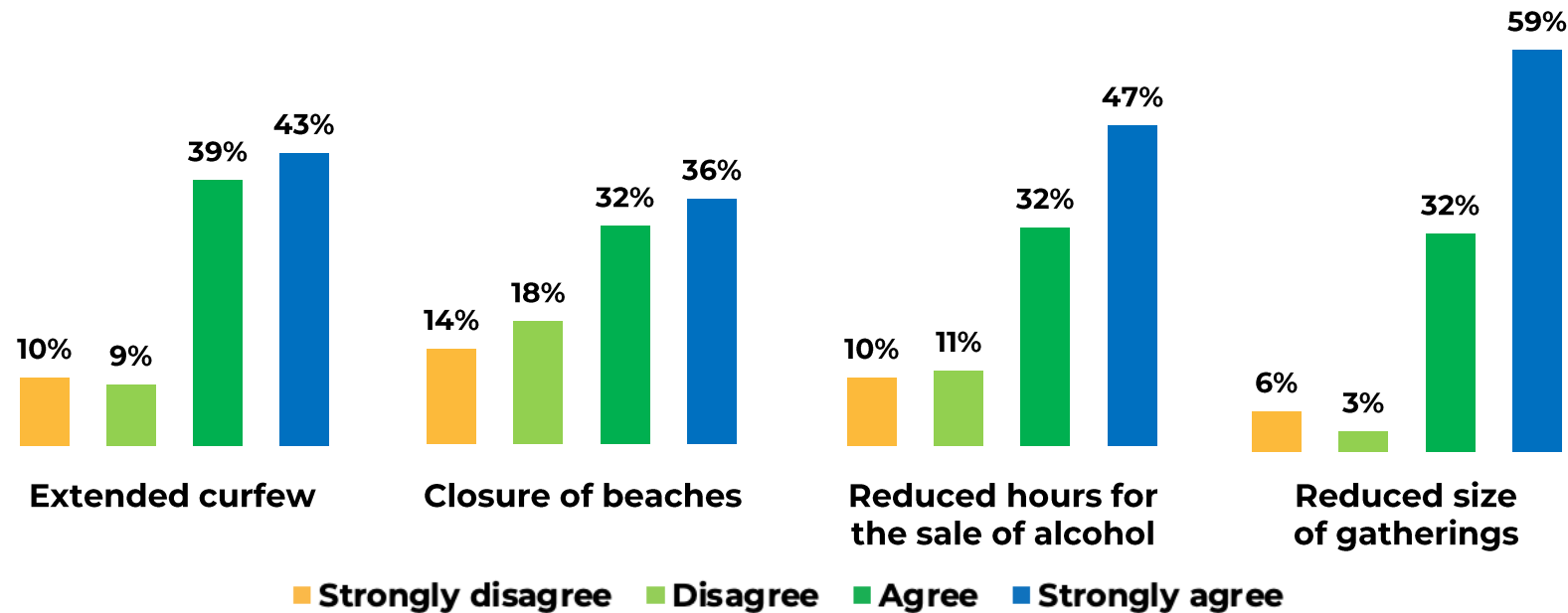


# FESTIVE ATTITUDES



# OVERALL, RESPONDENTS WERE IN FAVOUR OF THE LOCKDOWN REGULATIONS THAT HAVE BEEN IMPOSED BY THE GOVERNMENT TO CURB THE SPREAD OF THE VIRUS

Thinking of the following Covid-19 lockdown regulations, do you agree or disagree with the government's restrictions that have been implemented?

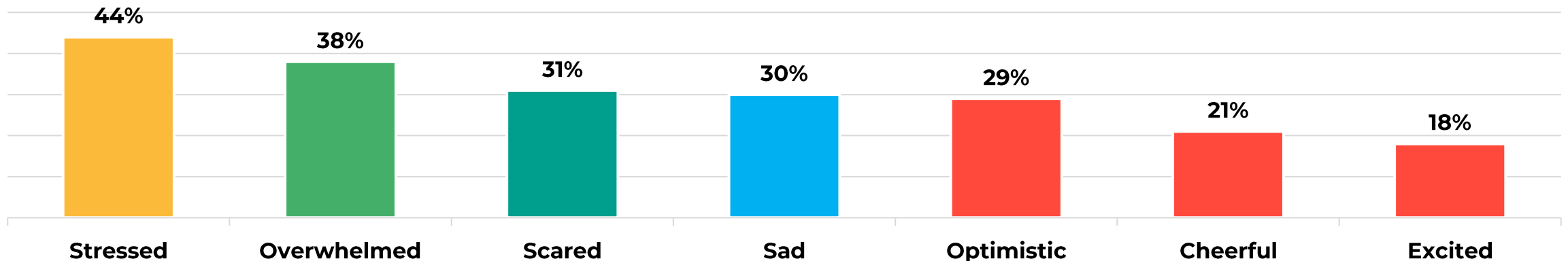


The regulation that received the least support was the closure of the beaches, with 32% of the sample disagreeing with this restriction. On the other hand, the vast majority of participants were in agreement with the regulations restricting the size of gatherings which ties in with the recognition that social distancing is an effective measure to limit the spread of the virus. Even the controversial restrictions of the curfew and reduced hours for the sale of alcohol were recognised as necessary measures in reducing the pressure on the country's health care capacity.

n = 1482

THE 4 MOST FREQUENTLY SELECTED EMOTIONAL DESCRIPTORS GIVE INSIGHT INTO THE RESPONDENT MINDSET OF SOUTH AFRICANS FOLLOWING THE CHALLENGES FACED IN 2020 – STRESSED 44%, OVERWHELMED 38%, SCARED 31% AND SAD 30%

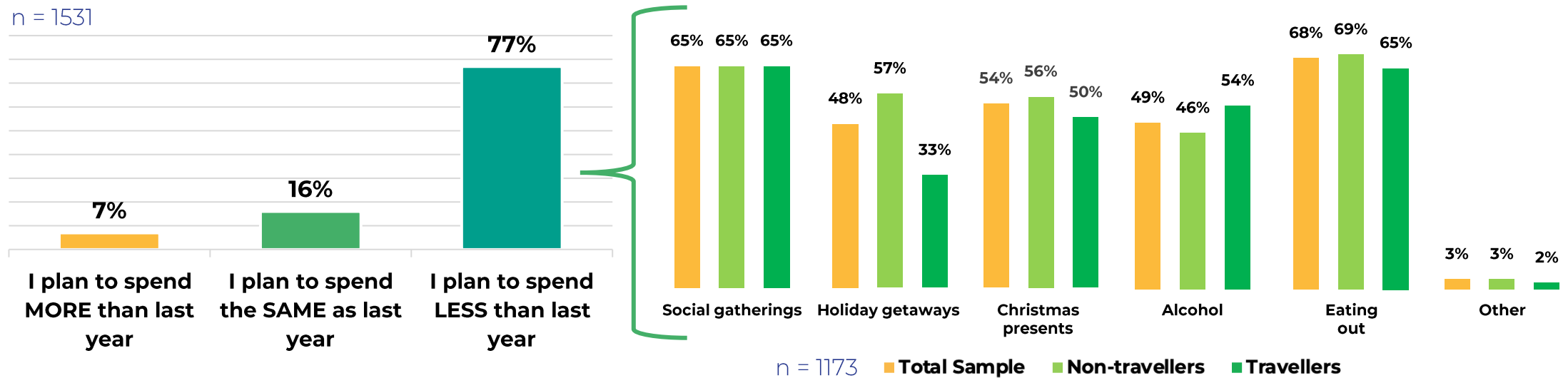
Which of the following words could be used to describe how you are feeling this festive season? Multiple selection possible



The sense of fear and loss associated with the pandemic shows clearly in the responses. Although positive emotions were cited, they were among the least selected to describe how participants were feeling. There is a glimmer of hope in that 29% of the sample were optimistic in spite of the hardships of 2020.

# THE MAJORITY (77%) INTENDED TO SPEND LESS OVER THE FESTIVE SEASON IN 2020 VS. THEIR SPENDING IN 2019 SHOWING THAT MOST HAVE IN SOME WAY BEEN NEGATIVELY IMPACTED BY THE ECONOMIC DOWNTURN OF 2020

Thinking of spending this festive season, will the way you spend your money be at all different compared to last year?



Only 7% of participants intended to spend MORE, while 16% intended to spend the SAME. Social gatherings (65%) and Eating out (68%) were the two primary areas where the total sample indicated that they would be reducing spend. The clear disparity in behaviour was that the majority of non-travellers in the sample intended to reduce their Holiday Getaway spend (57%) whereas only 33% of the respondents intending to travel were considering reducing their Holiday Getaway spend. They would instead cut back by reducing their spend on alcohol (54%).

The December 2020 festive season was projected to maintain the steady recovery trajectory achieved since leisure travel resumed in August 2020.

However, lockdown level 3 and the subsequent regulations implemented from 29 December 2020 have negatively impacted the sector and consumer propensity to travel.

To measure the impact of the level 3 regulations on the tourism sector, an industry assessment was conducted in January 2021.  
The results will be published in February 2021.



THANK YOU