



## WAVE 3

National Income Dynamics  
Study (NIDS) – Coronavirus  
Rapid Mobile Survey (CRAM)

# Synthesis Report

## NIDS-CRAM Wave 3

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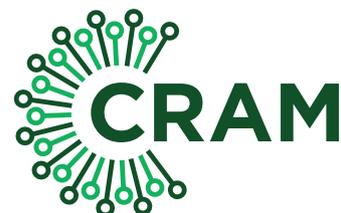
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NATIONAL INCOME DYNAMICS STUDY



CORONAVIRUS RAPID MOBILE SURVEY 2020

# Working Paper Series

## NIDS-CRAM Wave 3

1. Spaul, N., Daniels, R. C et al. (2021) *NIDS-CRAM Wave 3 Synthesis Report*.
2. Bassier, I., Budlender, J., & Zizzamia, R. (2021) *The labour market impact of COVID-19 in South Africa: An update with NIDS-CRAM Wave 3*
3. Benhura, M. & Magejo, P. (2021) *Differences in depressive symptoms between formal and informal workers during the COVID-19 crisis: Evidence from Wave 2 and Wave 3 of NIDS-CRAM*
4. Casale, D. & Shepherd, D. (2021) *The gendered effects of the Covid-19 crisis and ongoing lockdown in South Africa: Evidence from NIDS-CRAM Waves 1-3*
5. Espi, G., Leibbrandt, M., & Ranchhod, V. (2021) *Age, employment history and heterogeneity of COVID era employment outcomes*.
6. Maughan-Brown, B., Kohler, T., Burger, R., Rossouw, L., Christian, C., & English, R. (2021) *COVID-19 risk perceptions, preventive behaviour and COVID-fatigue during a lull in the epidemic in South Africa*.
7. Mohohlwane, N., Taylor, S., & Shepherd, S. (2021) *Schooling during the COVID-19 pandemic: An update from Wave 3 of the NIDS-CRAM data*.
8. Nwosu, C. (2021) *Childcare and depression during the coronavirus pandemic in South Africa: A gendered analysis*.
9. Oyenubi, A. & Kollamparambil, U. (2021) *How has the easing of lockdown influenced depressive symptoms in South Africa*.
10. Van der Berg, S., Patel, L., & Bridgman, G. (2021) *Hunger in South Africa during 2020: Results from Wave 3 of NIDS-CRAM*.
11. Van Walbeek, C., Hill, R., Filby, S., Van der Zee, K. (2021) *Market impact of the COVID-19 national cigarette sales ban in South Africa*.
12. Wills, G., Kika-Mistry, J. & Kotze, J. (2021) *Early Childhood Development and lockdown in South Africa: An update using NIDS-CRAM wave 3*.
13. Ingle, K., Brophy, T., & Daniels, R. *NIDS-CRAM Wave 3 Panel User Manual*.

*The NIDS-CRAM study is funded by the Allan & Gill Gray Philanthropy, the FEM Education Foundation and the Michael & Susan Dell Foundation. The views of the authors are not necessarily the views of the funders.*

The NIDS-CRAM Wave 3 data was collected between 2 November and 13 December 2020. This synthesis report is split into 7 sections which each draw from the papers listed above: (1) Employment: Bassier et al.; Casale & Shepherd; Espi et al. (2) Hunger: Van der Berg et al.; Oyenubi & Kollamparambil. (3) Grants: Bassier et al., (4) Education: Mohohlwane et al. (5) ECD: Wills et al. (6) Health: Maughan-Brown et al.; Oyenubi & Kollamparabil (7) Cigarette Sales Ban: Van Walbeek et al.

All papers are available for download at <https://cramsurvey.org/reports/> The NIDS-CRAM data is freely available for download at the Data First Open Data Portal: <https://www.datafirst.uct.ac.za/>

# 1. Employment

## 1. Strong employment recovery with significant labour-market adjustments.

NIDS-CRAM Wave 3 data shows evidence of a substantial job market recovery in October 2020 compared to April (Level 5 Lockdown), and June (Level 3 Lockdown). Between February and April 2020, we had previously found a substantial increase in those who were not employed – from 43% to 52%, as well as an increase in furloughed workers. We now find that by October 2020 the percentage of people employed is much closer to its February pre-pandemic level. The fraction of people employed (including furloughed workers) has changed from 57% (February), to 48% (April and June), and is now 55% in October. While there is always a margin of error around survey estimates, and there have been some changes in the number of working age adults over the period, these results suggest a considerable recovery between June and October 2020. The imminent release of StatsSA's QLFS 2020 Q4 results – a labour market survey with a larger sample size - will help verify the extent of these considerable changes.

## 2. However, of those who lost their jobs in April, only half were employed again by October, while about a third of those without employment in February were employed in October.

This suggests substantial churning in the labour market, which no longer looks the same as it did prior to the pandemic inspired lockdowns. The results from Wave 4 of NIDS-CRAM will shed more light on whether the recovery and adjustments to the labour market are sustained in January 2021, or whether the move to Adjusted Level 3 at the end of December 2020 compromises this upward trajectory.

## 3. Job recovery was stronger for those with more education, especially among the youth.

If one focuses on youth (18-24 years), those with a matric were more likely to be employed in October (42%) compared to February (29%), while employment for those with more-than-matric increased from 42% in February to 46% in October. We see the opposite trends for youth with less than matric whose employment was actually lower in October (23%) than in February (28%). This positive correlation between education and employment was also found for prime-age adults (25-40 years), but not for older adults (41-55 years).

## 4. NIDS-CRAM employment recovery is consistent with StatsSA monthly production and sales data, but cannot be directly linked to that data.

The employment recovery seen in Wave 3 of NIDS-CRAM is consistent with the monthly production and sales data released by StatsSA. These data are used for StatsSA's GDP calculations. They suggest that by October 2020, important sectors of the SA economy – Mining, Manufacturing, Wholesale, and Retail – were making October 2020 sales at or above their February 2020 levels. It should also be noted that a number of comparable countries have also experienced 'bounces-backs' in employment (to varying degrees), including Brazil, Colombia, Ghana, India, Mexico and Uruguay.

## 5. NIDS-CRAM Wave 3 results are robust to a number of data checks.

The employment recovery described here remains broadly the same after testing a number of alternative approaches to measuring employment, including using different definitions of employment that take account of different age categories or what counts as "employment" (i.e. using full time equivalent work based on days worked in the week rather than

Figure 1: Labour market transitions: Feb-Oct 2020



Source: Bassier, Budlender & Zizzamia (2021)

a count of the employed). Similarly, the results are unchanged after using a number of different weighting schemes or restricting the sample to the balanced panel (those who remain in the sample throughout the period). All NIDS-CRAM authors analyzing the employment data find the same broad trends across all papers.

- 6. Disaggregating the data by gender shows that with the move from Level 3 lockdown in June to the much less restrictive Level 1 lockdown in October, the substantial recovery in employment was greater for men compared to women.** Although the margins of error are quite large in the point estimates, given how much larger the fall in women's employment was as a result of the initial shock to the labour market between February and April 2020, it appears women still remained behind men in terms of reaching their pre-Covid employment levels in October.
- 7. Employed women were also working two fewer hours per week on average in October compared to February, while men's working hours were back up to pre-Covid levels.** However, given the small sample sizes (and therefore large margins of error), it would be prudent not to place too much emphasis on the exact numbers. At most one could say that the recovery between April and October was substantial for both men and women, although it appears to have been slower for women.
- 8. Given the reopening of schools, both women and men reported spending significantly fewer hours on childcare in October compared to June 2020.** Women were able to cut back their hours by a greater amount than men, however, highlighting how women have borne the brunt of school closures thus far. Nonetheless, among those living with children, women continue to spend more hours on childcare than men, with negative implications for their labour market prospects.

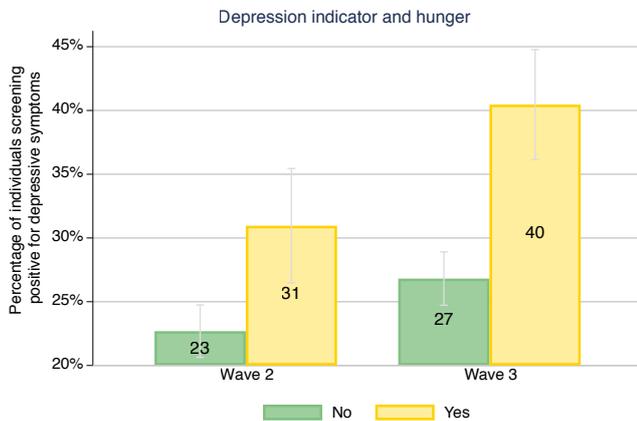
## 2. Hunger

- 1. Child hunger has now increased across the country, returning to the highest levels of the 'hard-lockdown' in May 2020.** In all waves of NIDS-CRAM households were asked the following question: "In the last 7 days has any child in your household gone hungry because there wasn't enough food?" The responses across the first two waves of NIDS-CRAM showed that child hunger decreased from a high of 15% in May/June to 12% in July/August 2020. The latest Wave 3 results now show that this has returned to its highest level of 16% in November/December 2020. Put differently, in November/December, 1-in-6 households with children in them reported that a child had gone hungry in the past week.
- 2. Household hunger has now increased across the country, with 1-in-5 households reporting weekly hunger.** Households were asked if anyone in the household had gone hungry in the last seven days. This rate was highest in May/June (23%), declined in July/August (16%) and has now risen again in November/December (18%). These changes are all statistically significant.
- 3. Removal of grant top ups to the Child Support Grant (CSG) and Old Age Pension (OAP) at the end of October 2020 will affect poor households the most, and especially Black women with children – the same group with one of the highest rates of reported weekly hunger.** In November 2020 the top-ups to the child Support Grant and Old Age Pension had been removed. Up until the beginning of October 2020, CSG-recipients had received an extra R500 per caregiver in addition to the R440 per child. Both household hunger and child hunger in NIDS-CRAM are highest for Black Africans, and CSG-recipients are also the most likely of grant-receivers to report running out of money to buy food, a strong indicator of food insecurity. In addition to the above it must be noted that the other main form of COVID-19 social assistance – the R350 Social Relief of Distress (SRD) grant - was phased out at the end of January 2021. The reduction of social protection while rates of adult and child hunger are still at the highest they have been for a decade will have severe consequences and may compromise child well-being in the longer term.
- 4. Strengthening links between hunger and depression.** Those experiencing weekly hunger were more likely to screen positive for depressive symptoms, and this relationship has strengthened over time. In November/December, 40% of those who experienced hunger in the last seven days screened positive for depressive symptoms compared to 27% among those not experiencing hunger. This gap is larger now than

it was in July/August.

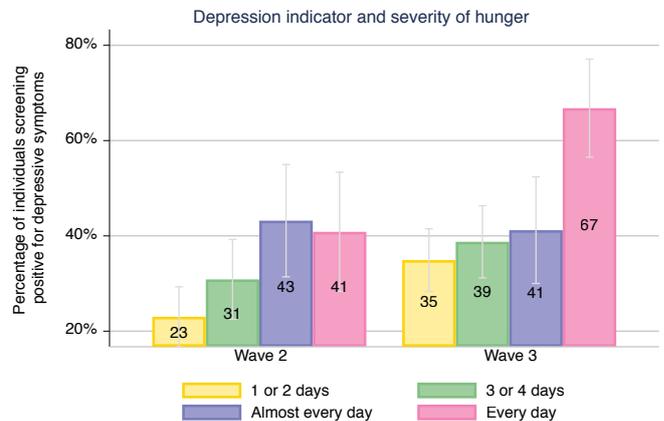
- 5. Rapidly deteriorating mental health for those experiencing hunger “Every day” with two-thirds (67%) now screening positive for depressive symptoms.** Although there has been a nationwide deterioration in mental health, this has been most pronounced for those experiencing hunger “Every day.” In July/August 41% of those experiencing hunger every day screened positive for depressive symptoms, while in November/December this had increased to 67%.

**Figure 2:** Percentages of respondents screening positive for depressive symptoms by hunger and wave of NIDS-CRAM



Source: Oyenubi & Kollamparambil (2021)

**Figure 3:** Percentages of respondents screening positive for depressive symptoms by hunger frequency in Wave 2 and 3 of NIDS-CRAM

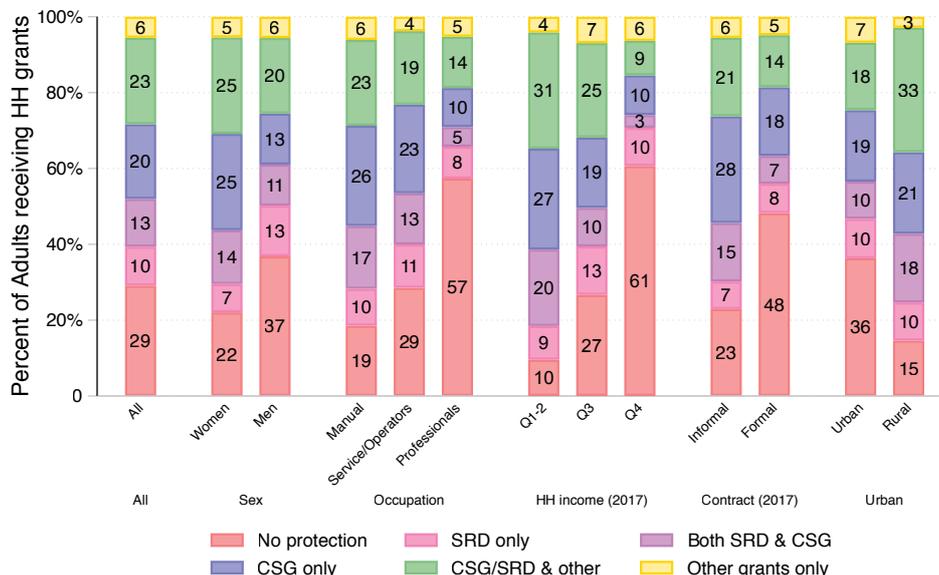


Source: Oyenubi & Kollamparambil (2021)

# 3. Grants

- 1. The SA grant system is far-reaching: In October 2020 more than 70% of South African adults live in households that receive a government grant.** Among all South African adults, 71% live in a household that receives some form of a government grant, with two thirds (65%) living in households that receive either a Child Support Grant (CSG), or a R350 Social Relief of Distress Grant, or both. The SA grant system is also progressively targeted since in October 2020 approximately 90% of the poorest adults (Q1-2) lived in a household that received a grant,

**Figure 4:** Social assistance coverage for all adults in South Africa



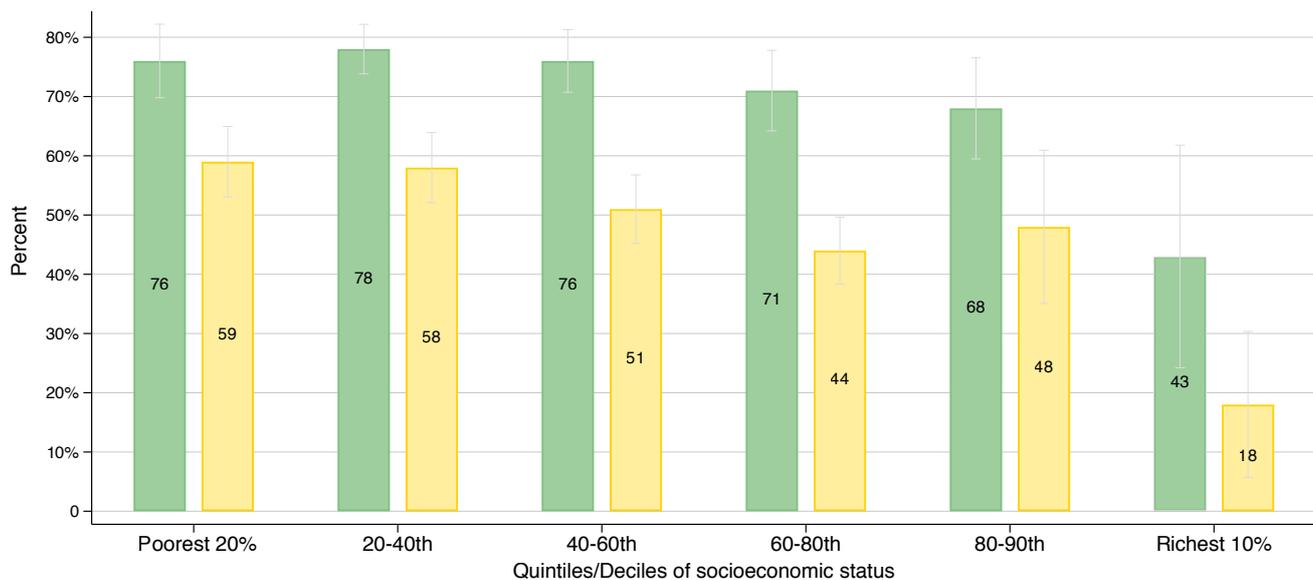
- 2. These results reflect the “peak” of grant coverage (October 2020) given that grant top-ups for traditional grants were to removed in November 2020.** Grant top-ups to the Child Support Grant (+R500 per caregiver) and the Old Age Pension (+R250 per pension) were last paid at the beginning of October 2020 with no top-ups paid from November onwards. The last payments for the R350 Social Relief of Distress (SRD) Grant were paid at the end of January 2021, with this grant set to expire at the end of January 2021. Given that 10% of adults are in households that receive only the SRD grant, these households will now fall out of the social protection system.
- 3. Women less likely to get unemployment grants (UIF or SRD) despite being more likely to be unemployed.** An important finding is that even though women were more likely to be unemployed in October than men, they were under-represented in the income support provided. Just under 40% of the UIF/UIF-TERS beneficiaries and 37% of the Covid-19 SRDG recipients in October were women (similar figures to those recorded in June). That fewer women have received the SRDG is likely because it cannot be held concurrently with another social grant such as the CSG. Unemployed women have effectively been penalised for collecting the CSG on behalf of a child as the primary caregiver. This gender bias in the social protection system is all the more worrying following the government’s decision to suspend the top-ups to the CSG in October 2020 and extend the SRDG for a further 3 months until January 2021.

## 4. Education

- 1. Weekly school attendance rates increased significantly from 37% in July 2020 to 98% in November 2020, although this overstates *daily* attendance.** In November 2020 all school grades were ‘open’ and practically all respondents (98%) reported that children in their household had gone back to school in the previous week. It must be noted that the vast majority of schools were operating under ‘rotational timetabling’ where only half the class attends school on one day, the other half on the next day, and so on. The NIDS-CRAM question asked about any attendance in the last seven days and therefore cannot identify daily attendance. Thus, while it is encouraging that weekly school attendance (attending at least once in the past week) has returned to pre-pandemic levels, daily school attendance is likely to remain well below pre-pandemic levels.
- 2. While access to free school meals has increased since July 2020, they have still not returned to pre-pandemic levels despite all school grades being ‘open’.** In July 2020 only 25% of respondents indicated that a child had received a free school meal in the past week. This increased significantly to 48% in November 2020. According to the 2018 General Household Survey, the pre-pandemic level is 65%.
- 3. Rates of worry about learner return during the pandemic have declined significantly, although poorer households are three times more likely to be “very worried” compared to the wealthiest households.** If respondents were in households that included school-going children, they were asked about whether they were worried about these children returning to school. In July 2020, 72% of these respondents reported they were “very worried” about their children returning to school. This rate fell to 52% in November 2020. Although this is a sharp decline, it still shows that half of caregivers in the country are worried about children

returning to school. Respondents from the poorest 40% of households were three times as likely to report being very worried (59%) compared to respondents from the wealthiest 10% of households (18%).

**Figure 5: Estimated level of “high worry” of school return during a pandemic in July 2020 (green) and November**



**Source:** NIDS-CRAM, Wave 2 (2020) and Wave 3 (2020)

**Note: 1.** Household per capita income is estimated using point estimate and bracket responses to household income items in NIDS-CRAM Wave 2 with missing data represented by a lower-bound estimate based on earnings and receipt of child support and old-age pension grants.

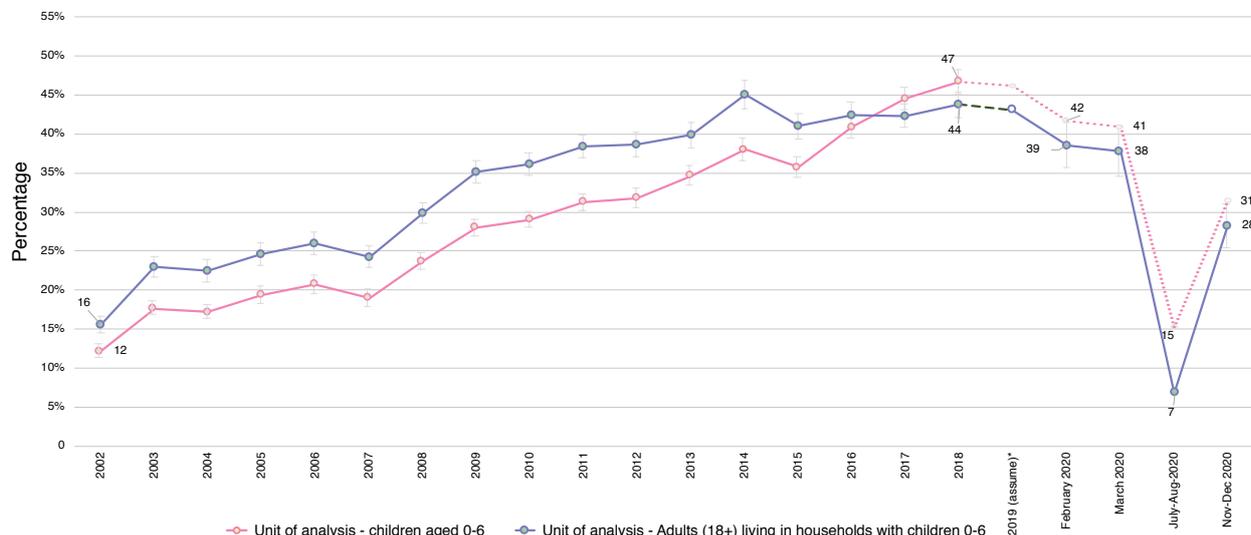
**2.** The panel sample of respondents across all three waves is used. Data are weighted appropriately.

**3.** 95% confidence intervals indicated.

- 4. Rotational timetables decrease daily attendance, decrease access to free school meals, and increase existing inequalities.** A review of government reporting and guidelines shows that the practice of implementing daily rotational timetables with only half the class attending on any given day are one of the reasons for lower-than-expected school feeding (October 2020 DBE report on court order compliance). Similarly, where schools practice 50% rotational timetabling, daily attendance of learners can only be a maximum of 50% of scheduled school days. Given that rotational timetables are only applied in schools where social distancing (1m+) is not possible, this practice is concentrated in no-fee schools. Existing research on secondary schools shows that three quarters (73%) of Quintile 1 and 2 schools have large classes (45+ learners), compared to only 17% of Quintile 5 (fee-charging) schools. The practice of rotational timetables clearly affects children in no-fee schools more than those in fee-charging schools, and therefore increases inequality.

# 5. Early Childhood Development (ECD)

**Figure 6:** ECD attendance rates of children aged 0-6 from 2002-2018 (GHS) against 2020 NIDS-CRAM estimates.



Source: Wills et al (2021).

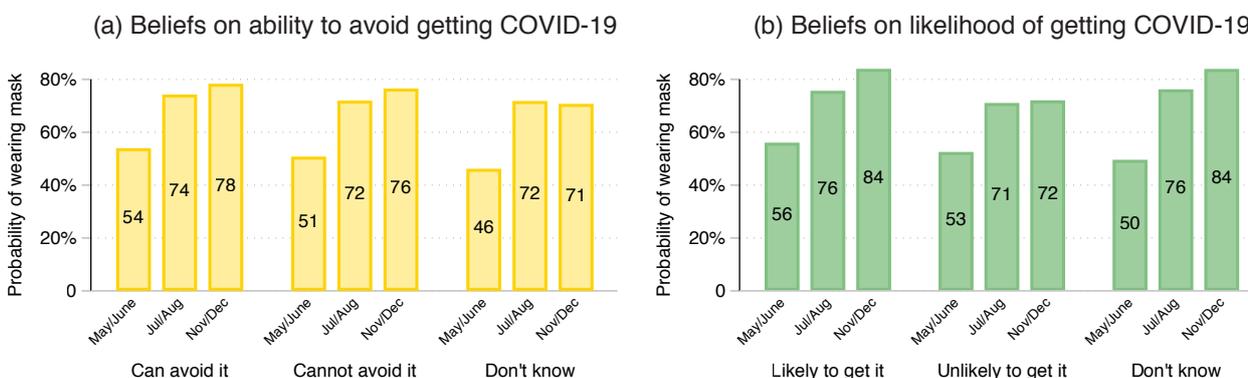
- 1. ECD attendance rates doubled from 15% in July/August to 31% in November/December, although still lower than pre-pandemic levels.** Among NIDS-CRAM respondents interviewed in November/December and living with children aged 0-6, 28% reported at least one child attending an ECD programme in the past 7 days. This is up from just 7% reporting attendance in July/August. Extrapolating these NIDS-CRAM individual level responses to the level of the child suggests that about 31% of children aged 0-6 were enrolled in ECD programmes by November/December, compared to at most 15% in July/August. ECD attendance in November/December (28%) is still lower than pre-pandemic reported attendance in February (39%).
- 2. Two thirds of respondents (68%) living with young children said they could not afford ECD fees in October and were more likely to be women living in poverty.** Respondents who report that they could not afford ECD fees were more likely to be women, poorer, grant recipients, less likely to be employed and more likely to be unemployed but searching for work. Under the current ECD financing system, this evidence suggests that where ECD attendance is linked to fee payment, widening inequalities in access to ECD are expected. Despite this, the evidence suggests that a substantial number of ECD practitioners seem to be acting benevolently by accepting children at programmes despite non-payment of fees.
- 3. Respondents interviewed in November/December who could afford to pay ECD fees in October were almost four times more likely to have children attending ECD in the past 7 days (67%), compared to those who could not afford fees (17%).** The ability to pay ECD fees earlier in the year is significantly associated with whether children attend programmes later in the year. After controlling for background characteristics, even after accounting for attendance in February and fees paid that month, respondents are 43 percentage points more likely to report a child attending ECD in the past 7 days if they said they could afford fees in October, compared to those that could not afford fees in October.
- 4. Among respondents who said children had not attended ECD in the past 7 days but did attend pre-pandemic (February), a third (31%) said this was due to temporary closure of centres.** Of wave 3 respondents living with children attending ECD in February but not in the past 7 days, roughly 31% cited temporary closures of centres as the main reason for non-attendance and a further 6% indicated that the centre closed permanently. Therefore, regardless of the reasons for the partial recovery, continued support for the sector remains imperative.

- Pre-lockdown, children from households who could pay fees were 50% more likely to get a meal at their ECD centre (61% received meals) compared to those who could not pay fees (41% received meals) – an important indicator of quality.** Of NIDS-CRAM wave 3 respondents who indicated that they paid fees for children to attend an ECD programme in February, 61% indicated that a child received a meal at the programme that month. By comparison, among respondents who did not report fees paid for children attending ECD in February, only 41% said children received meals at the programme that month.

## 6. Health

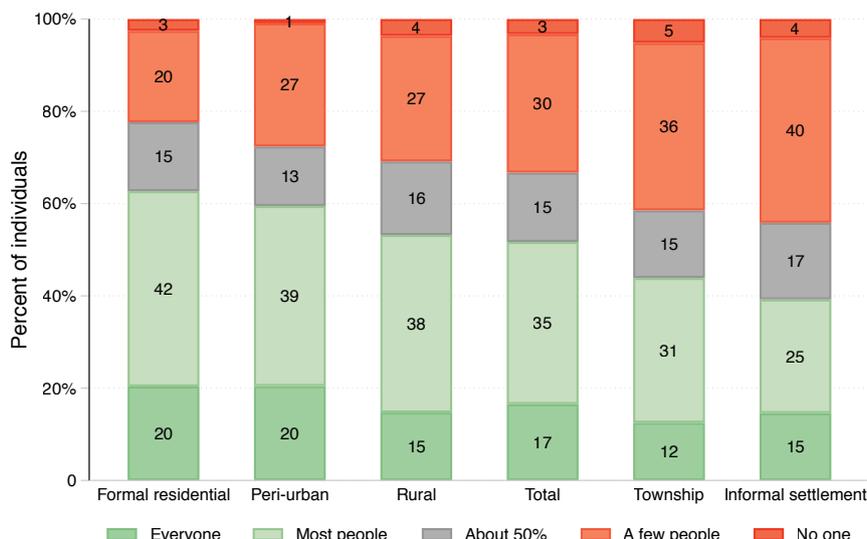
- Mental health in South Africa is deteriorating - between July and December there was a significant increase in the percentage of people screening positive for depression, increasing from 24% to 29% of the population.** While the risk of screening positive has not changed for those who are not Black Africans, this risk has increased for Black Africans over the period. Those in formal employment were found to be protected against depressive symptoms compared to others.
- Fewer respondents think they will get COVID-19, and more now believe they can avoid getting it.** The percentage of respondents who thought they “were likely to get COVID-19” decreased from 43% in July/August to 38% in November/December. In contrast, the percentage of respondents who believed that one “can avoid getting COVID-19” increased from 82% in July/August to 84% in November/December.
- Reported mask wearing has increased for all groups over time, irrespective of COVID-19 beliefs.** Reported adherence with mask-wearing has increased significantly over time. In July/August 74% of respondents reported mask wearing, increasing to 78% in November/December. As the graph below shows, between July and December 2020 this increase was largest for those who think they are likely to get COVID-19. It must be noted that reported handwashing has decreased over the same period from 60% in July/August to 53% in November/December, and physical distancing has also decreased.

**Figure 7: Trends in COVID-19 beliefs and mask wearing in South Africa from May to December 2020**



Source: Maughan-Brown et al. (2021) using NIDS-CRAM Wave 3

**Figure 8: Geographic variation in reported neighbourhood adherence to mask-wearing in the month of October 2020**



Source: Maughan-Brown et al. (2021) using NIDS-CRAM Wave 3

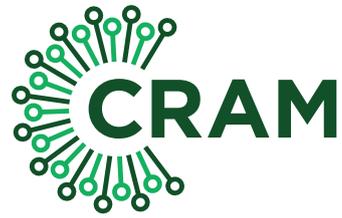
- Households in townships report the lowest levels of mask wearing in their community.** Respondents were asked “In October how many people in your neighbourhood wore masks when they were in public, on the streets of your neighbourhood?” The figure below shows that reported community adherence to mask-wearing was highest in formal residential areas where 63% said that ‘Everyone’ or ‘Most people’ wore masks in public compared to 39-44% among those in Townships and Informal Settlements.

## 7. Cigarette Sales Ban

- Estimates show that 85% of smokers continued smoking during the cigarette ban, only 8% quit, and half of those who quit indicated they started smoking again when the ban was lifted.** Tobacco sales were prohibited between 25 March and 17 August 2020 as part of the government’s response to the COVID-19 pandemic. According to weighted NIDS-CRAM Wave 3 data, adjusted by an additional factor to account for proxy reporting in NIDS Wave 5 (see Van Walbeek et al’s 2021 report) there were approximately 6.7 million adult cigarette smokers (aged 18+) in South Africa before the start of the lockdown. Of these, about 536 000 (8%) indicated that they quit during the sales ban period, about 5.7 million (85%) indicated that they continued smoking and nearly 500 000 (7,5%) refused to answer whether they continued smoking or quit. About 262 000 people who quit during lockdown (4%) indicated that they started smoking again after the sales ban was lifted.
- The average number of cigarettes smoked decreased from 7.9 in 2017 to 6.5 during the sales ban, but went up to 8.8 after the ban.** External price data, adjusted for inflation and expressed in constant November 2020 prices, showed that the average price of cigarettes increased by nearly 200% between 2017 and its highest point during the sales ban, with substantial geographical variation in those prices.
- All players in the tobacco industry were not affected equally by the ban, with local companies able to increase their market share at the expense of multinationals.** The NIDS-CRAM survey asked respondents what brand of cigarettes they bought during and after the sales ban. These results show that the market share of the multinationals decreased to 33% during the sales ban and increased to just more than 50% after the sales ban.
- The tobacco market was greatly disrupted by the tobacco sales ban during the lockdown.** Continuing smokers were forced to buy cigarettes at greatly inflated prices, and many people were forced to switch brands. The market structure changed dramatically during the sales ban period and, even though there has been a partial reversal of the market after the ban was lifted, the market shares are substantially different than before the sales ban.



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