



Wildflowers in Spring: Cape West Coast



## Tourism Niche Study: Nature Tourism

2020

**Wesgro**  
cape town & western cape  
research

An inspiring place to know

# Contents

1. Methodology
2. Participation and Sample Size
3. Overview of Nature Tourism
4. Nature Tourism Visitor Trends Analysis
  - 4.1 Nature-based Tourism Activities in South Africa
  - 4.2 Nature-based Tourism Activities in South Africa and the Western Cape
  - 4.3 Outdoor Activities in the Western Cape
  - 4.4 Scenic Drives in the Western Cape
  - 4.5 Western Cape Nature-based Tourism Visitor Trends
5. Opportunities for Nature Tourism from European Markets
6. Key Findings
7. List of Sources

Wesgro has taken every effort to ensure that the information in this publication is accurate. We provide said information without representation or guarantee whatsoever, whether expressed or implied. It is the responsibility of users of this publication to satisfy themselves of the accuracy of information contained herein. Wesgro cannot be held responsible for the contents of the publication in any way.

© Wesgro, 2020.

# 1. Methodology

This report provides an overview of the tourism trends and patterns amongst visitors who engaged in nature activities throughout the Western Cape. The findings will illustrate key visitor trends obtained from the regional visitor tracking survey. In addition, the report aims to provide tourism market insights from qualitative sources for greater awareness of the Nature Tourism market.

*Responses to the regional visitor tracking surveys are used as a proxy to indicate the key trends within the Western Cape and the various regions. It is important to note that absolute figures cannot be determined from these surveys, as the survey responses are a sample of the tourists into the respective tourism offices across the Western Cape, and would thus represent a sample of the visitors. Therefore, where statistically relevant absolute numbers may be given, however, a share is provided to indicate the trend. This is based on international best practice in the use of surveys within the tourism industry for determining key trends.*

**Definition:** Tourist: refers to any visitor travelling to a place other than that of his/her own environment for more than one night, but less than 12 months and for whom the main purpose of the trip is other than the exercise of an activity remunerated for from within the place visited.

## 2. Participation and sample size

In 2019, a total of **17,727** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Western Cape. Of these respondents, 14% listed outdoor activities and 22% listed scenic drives as an in-destination activity. This report focuses on the respondents who engaged in outdoor activities (**2249**) and scenic drives (**3804**) from the following participating regions:

	Outdoor Activities	Scenic Drives
Garden Route & Klein Karoo	678	992
Cape Karoo	104	88
Cape Overberg	432	647
Cape Town	390	220
Weskus	435	1475
Cape Winelands	410	382





### 3. Overview of Nature Tourism

- Global tourist arrivals grew by 4% and totalled 1.4 billion in 2019, according to the January 2020 edition of the United Nations World Tourism Barometer (UNWTO). Although below the annual average of 5% growth over the last 10 years, tourism still outpaced global economic growth (+4% vs. +3%). By region, Middle East (+8%) and Asia and the Pacific (+5%) led growth, while arrivals to Africa and Europe both increased by 4%, in line with the world average growth. The Americas increased by 2% year-on-year.
- The World Travel & Tourism Council (WTTTC) reported that Travel & Tourism's direct, indirect and induced impact accounted for US\$ 8.9 trillion contribution to the world's GDP, which translates to 10.3% of global GDP.
- Nationally, foreign tourist arrivals to South Africa reached 10.2 million in 2019 with R81,2 billion in foreign direct spend. Domestic travel saw significant growth (+61,3% year-on-year) in 2019, reaching 28.5 million trips and R43,9 billion in total direct spend.
- In 2019, tourist arrivals to the Western Cape increased by 16% year-on-year, reaching the 2 million mark for the first time. Total foreign direct spend reached R18.6 billion. Domestic trips to the province increased exponentially (+244%), going from 1,2 million in 2018 to 4,4 million in 2019. Total direct domestic spend went from R1,9 billion in 2018 to R7,7 billion (+315%) in 2019.
- By province, the Western Cape was by far the most popular province for visiting natural attractions in 2018, with +- 70% share of visiting natural attractions. In addition visiting natural attractions ranked as the second most popular activity undertaken by visitors to the Western Cape in 2018.
- The UNWTO defines Ecotourism as *"a type of nature-based tourism activity in which the visitor's essential motivation is to observe, learn, discover, experience and appreciate biological and cultural diversity with a responsible attitude to protect the integrity of the ecosystem and enhance the well-being of the local community"* Nature-based tourism consists of travel for the purpose of experiencing natural landscapes, flora and fauna, protecting the environment and improving the local community's quality of life. Those who are interested in nature and ecotourism are seeking rich, natural, cultural and historical experiences. (CBI, 2020)
- Nature tours, discovering fauna and flora, culture and heritage, wildlife, cycling, bird watching, star gazing, scenic drives, visiting parks and beach experiences are amongst the many examples of products that fall within the category of nature and ecotourism.
- The demand for nature and ecotourism continues to grow as tourists become more mindful of leaving a positive impact on the destinations they visit. A 2019 Sustainable Travel Report by Booking.com reveals that 72% of travellers believe that sustainable travel choices have to be made to protect the planet for future generations.
- Another Booking.com survey in 2018 mentions that 60% of travelers found impressive natural sights visited on past travels as their inspiration to travel more sustainably. The ongoing debate on over-tourism and its negative impact on host communities is another driver for sustainable tourism including nature and ecotourism that seeks to preserve the natural and social well-being of the destination.
- With world-class natural attractions such as Table Mountain National Park, the Cape Floral Kingdom, Kirstenbosch National Botanical Garden, Tsitsikamma Forest, Cango Caves, Karoo National Park and Storms River Mouth, the Western Cape is perfectly positioned to cater to the nature-loving traveller.



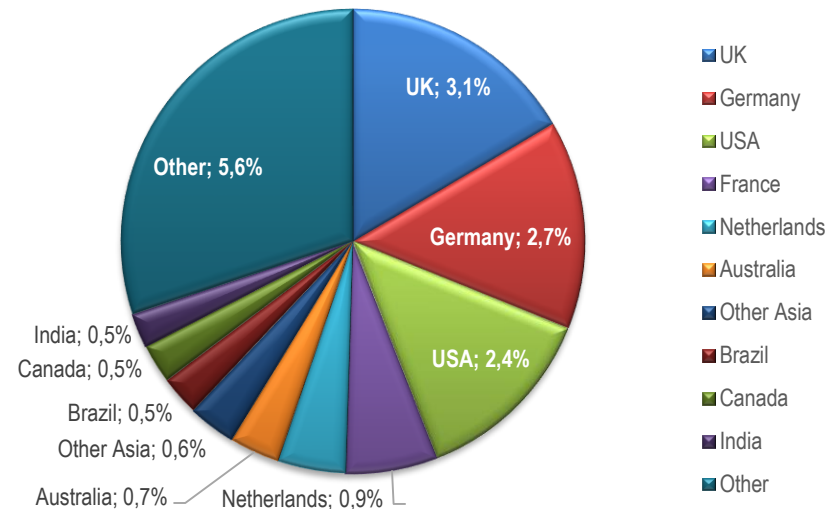


# Nature Tourism Visitor Trends

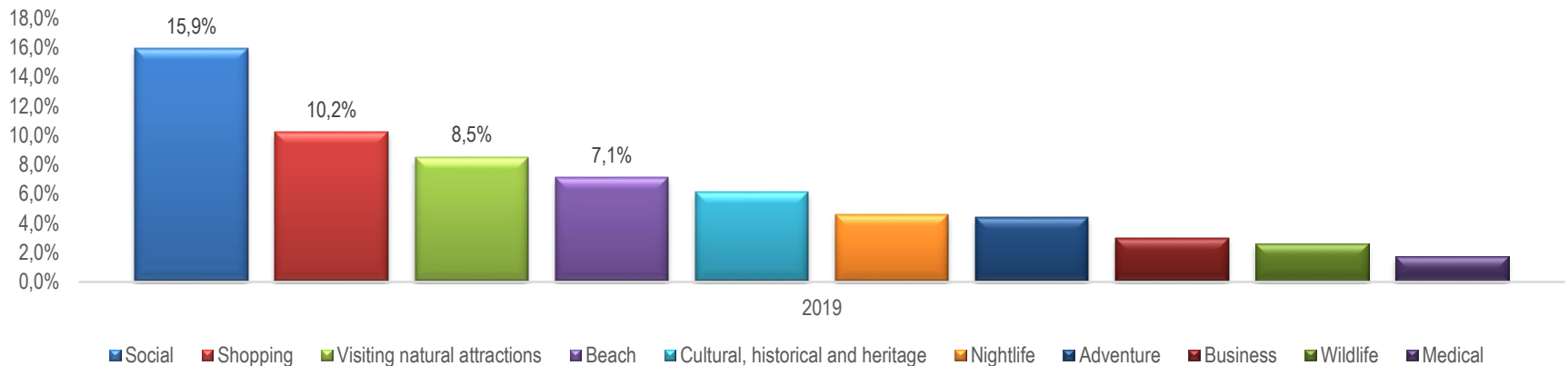
## 4.1 Nature-based Tourism Activities in South Africa

- Travellers who visit natural attractions in South Africa are predominantly from European markets. The top 5 markets which make up more than half of all international respondents who visited natural attractions in South Africa in 2019 are: UK, Germany, USA, France and Netherlands.
- On the domestic front, 2019 saw a notable increase in domestic travellers visiting natural attractions throughout South Africa.
- Visiting natural attractions (8,5%) was the third most popular activity amongst domestic travellers, after social (15,9%) and shopping (10,2%), and was followed by beaches (7,1%).

VISITING NATURAL ATTRACTIONS IN SOUTH AFRICA BY SOURCE MARKET, 2019



DOMESTIC TOURIST ACTIVITIES IN SOUTH AFRICA, 2019

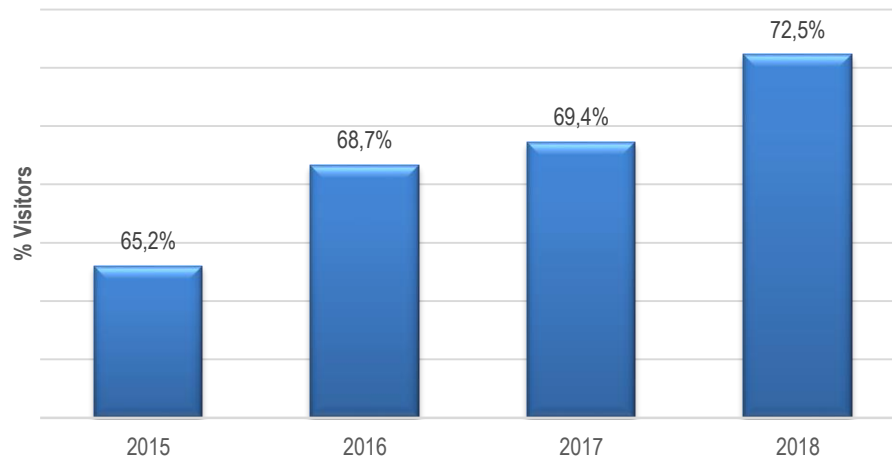




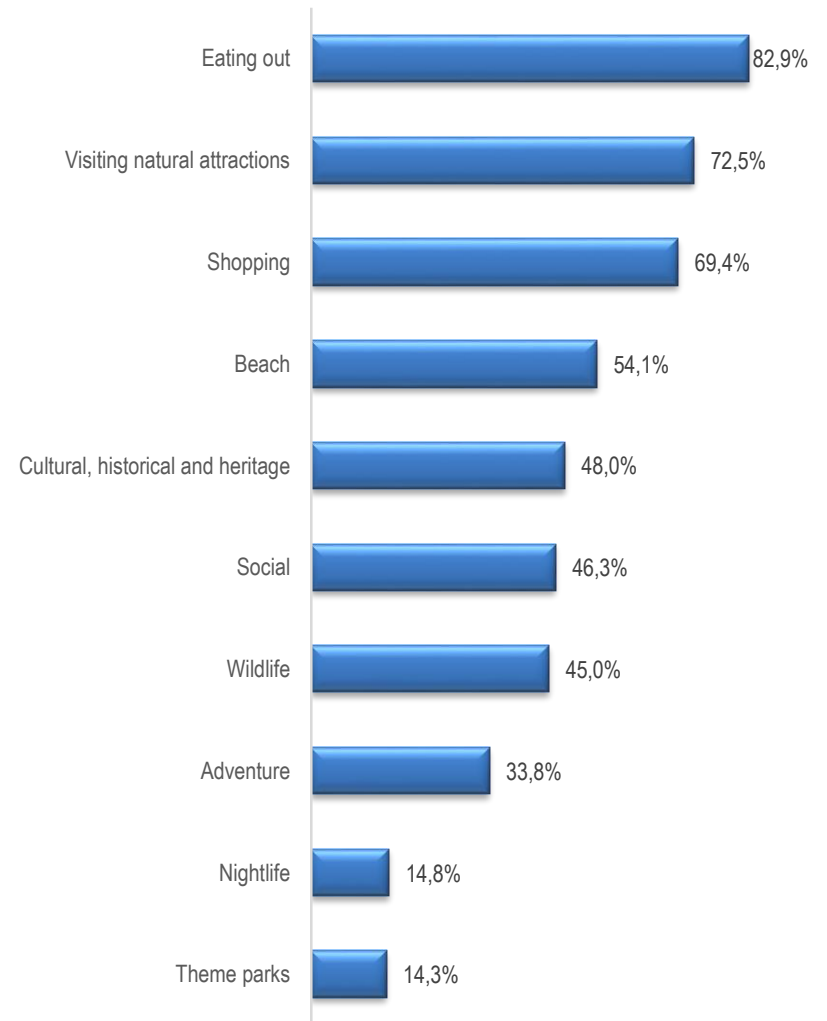
## 4.2 Nature-based Tourism Activities in South Africa & the Western Cape

- Visiting natural attractions (72,5%) was the second most popular activity amongst international visitors to the Western Cape in 2018, after eating out (82,9%).
- In addition, other outdoor activities such as beaches (54,1%), wildlife (45,0%) and adventure (33,8%) were amongst the top picks for international visitors to the province.
- The share of international tourists visiting natural attractions in the Western Cape increased steadily going from a share of 65,2% in 2015 to 72,5% in 2018.

YEAR-ON-YEAR COMPARISON OF INTERNATIONAL TOURISTS VISITING THE WESTERN CAPE NATURAL ATTRACTIONS, 2015 - 2018

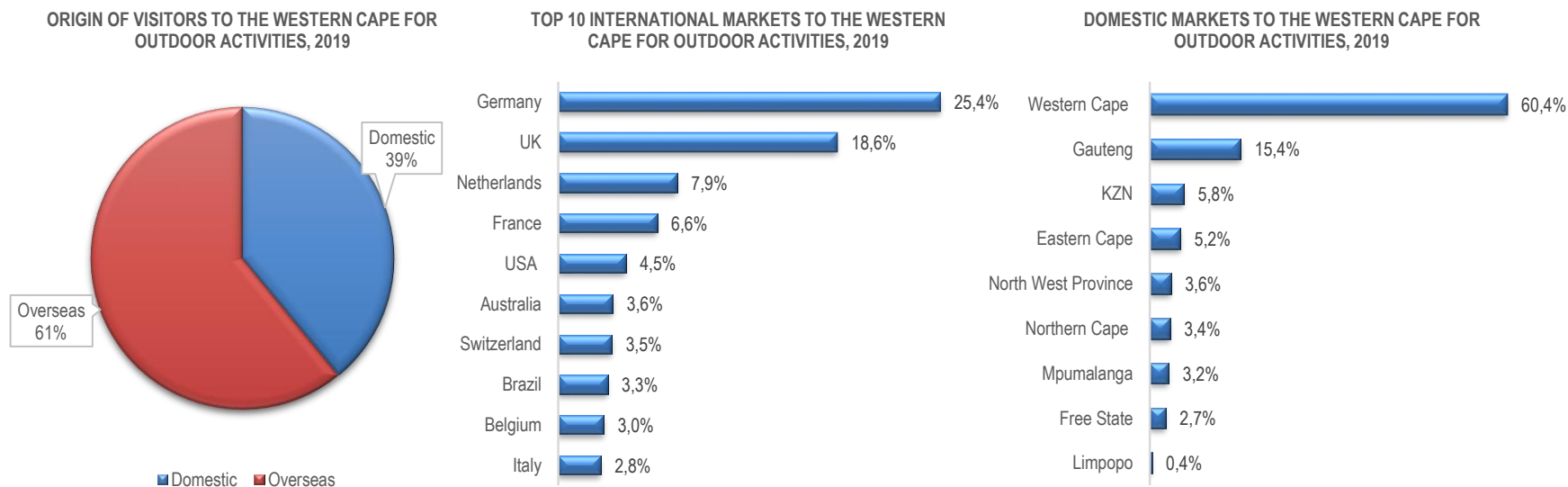


WESTERN CAPE ACTIVITIES RANKING, 2018



## 4.3 Outdoor Activities in the Western Cape

- The strength of international visitors engaging in outdoor activities is evident in the Western Cape, with 61% of survey respondents who engaged in outdoor activities originating from the overseas market and 39% coming from domestic markets.
- Europe continues to dominate in outdoor activity in the Western Cape with 7 out of the top 10 international markets who enjoyed outdoor activities in the Western Cape originating from the continent.
- The Western Cape's top North American market, the United States, also ranked in the top 10 markets who enjoyed outdoor activities in the province.
- From the domestic market, the Western Cape (60,4%), Gauteng (15,4%) and Kwazulu-Natal (5,8%) ranked as the top three provinces who embarked on outdoor activities in the province.
- The high number of Western Cape locals engaging in outdoor activities within their province indicates that local tourism also remains a very important market for the tourism sector, particularly due to the many economic challenges the market is facing.

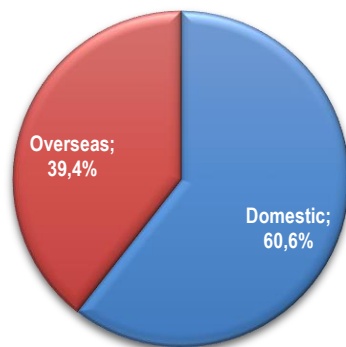




## 4.4 Scenic Drives in the Western Cape

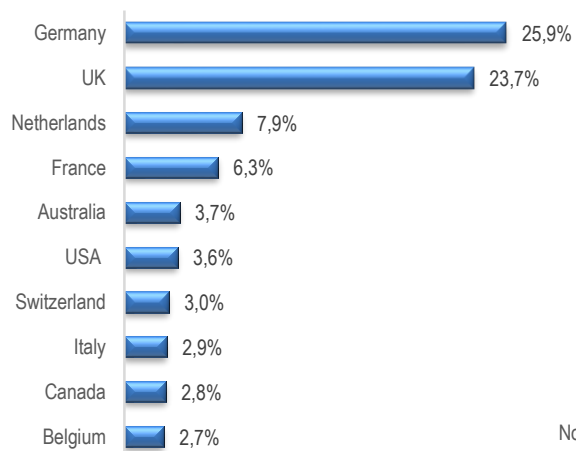
- In 2019, scenic drives was listed as the most common activity enjoyed by visitors to the Western Cape, followed by culture & heritage and outdoor activities.
- Scenic drives are more common amongst domestic travellers, with 60,6% of survey respondents who undertook scenic drives originating from the domestic market and 39,4% coming from overseas markets.
- On the international front, 7 out of the top 10 international markets who undertook scenic drives in the Western Cape were from the European region.
- North American markets, United States and Canada, also ranked amongst the top 10 markets who enjoyed scenic drives in the province.
- From the domestic market, the Western Cape (66,1%), Gauteng (14,7%) and Eastern Cape (5,2%) ranked as the top three provinces who took scenic drives during their stay in the province.

ORIGIN OF VISITORS TO THE WESTERN CAPE FOR SCENIC DRIVES ACTIVITIES, 2019

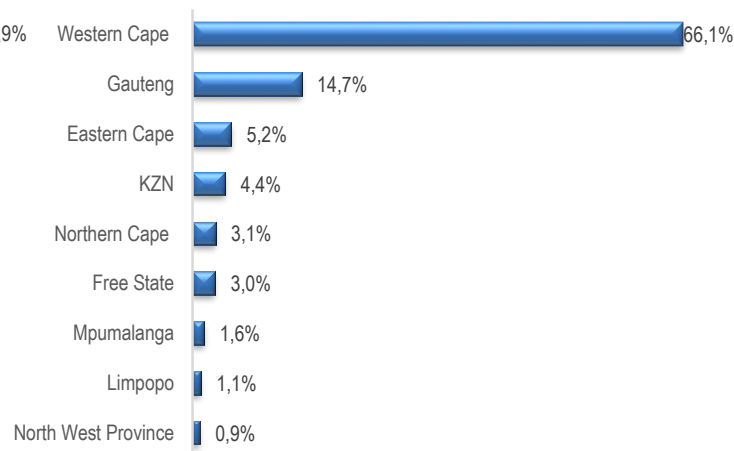


■ Domestic ■ Overseas

TOP 10 INTERNATIONAL MARKETS TO THE WESTERN CAPE FOR SCENIC DRIVES, 2019



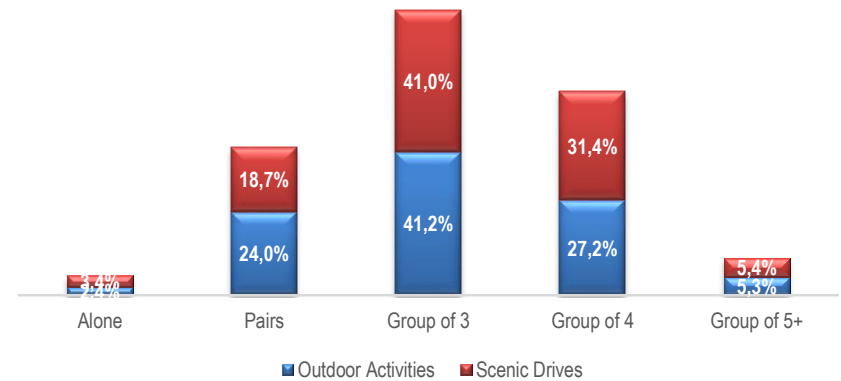
DOMESTIC MARKETS TO THE WESTERN CAPE FOR SCENIC DRIVES, 2019



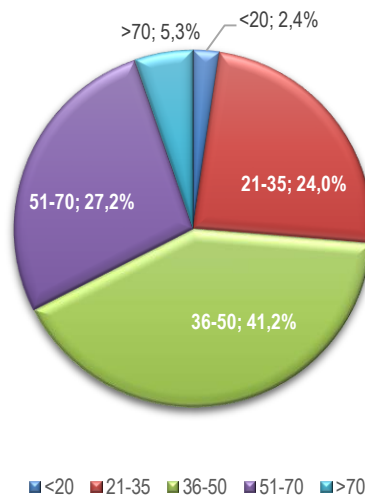
## 4.5 Western Cape Nature-based Tourism Visitor Trends

- The majority of respondents who engaged in outdoor activities indicated to have travelled in groups of 3 (41,2%), groups of 4 (27,2%) or in pairs (24,0%).
- Those who took scenic drives followed a similar trend with 41,0% travelling in groups of 3, groups of 4 (31,4%) or in pairs (18,7%).
- The vast majority of respondents who engaged in outdoor activities indicated to be between the ages of 36 – 50 years (41,2%), 51 – 70 (27,2%) and 21 – 35 years (24,0%). Similarly, those who took scenic drives were mostly aged 36 – 50 years (41,0%), 51 – 70 years (31,4%) and 21 – 35 years (18,7%).
- This is consistent with the general age categories of visitors to the Western Cape.

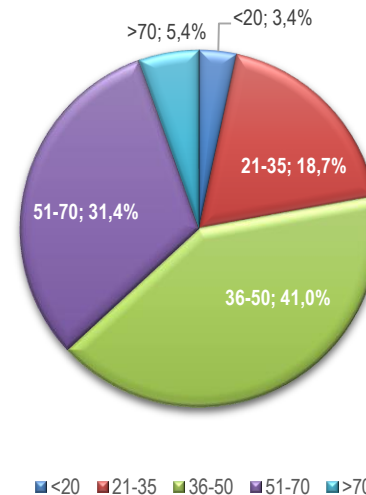
GROUP SIZE OF VISITORS TO THE WESTERN CAPE FOR OUTDOOR ACTIVITIES & SCENIC DRIVES, 2019



AGE CATEGORY OF VISITORS TO THE WESTERN CAPE FOR OUTDOOR ACTIVITIES, 2019



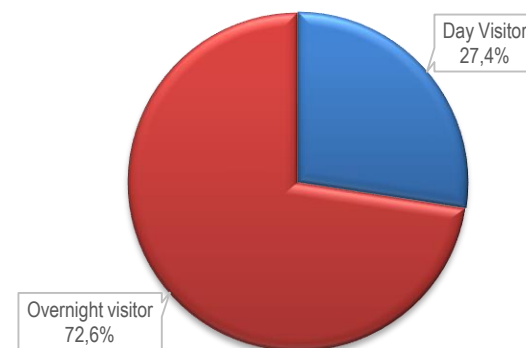
AGE CATEGORY OF VISITORS TO THE WESTERN CAPE FOR SCENIC DRIVES, 2019



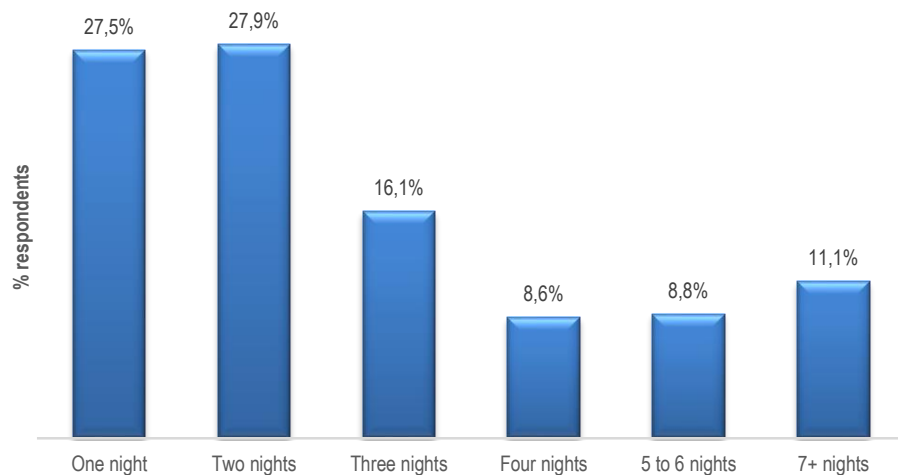
## 4.5 Western Cape Nature-based Tourism Visitor Trends

- Overall visitors to the Western Cape indicated to be mostly overnight visitors (53,4%), and 72,6% of respondents who engaged in outdoor activities indicated to be overnight visitors as well. This suggests that visitors who engaged in outdoor activities were much more likely to stay overnight.
- Those who stayed overnight spent a longer time in the destination with respondents indicating to spend an average of one night (27,5%), two nights (27,9%), or three nights (16,1%) in the province.
- This trend underlines the Western Cape's desirability for weekend getaways in the province.
- Self catering, guesthouse, B&B and hotel were amongst the top accommodation choices for respondents who engaged in outdoor activities in the Western Cape.

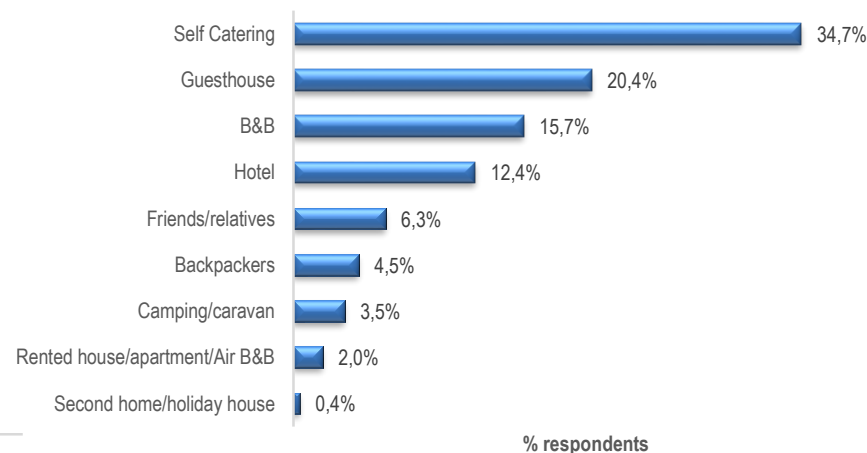
OVERNIGHT & DAY VISITORS TO THE WESTERN CAPE FOR OUTDOOR ACTIVITIES, 2019



AVERAGE LENGTH OF STAY OF OVERNIGHT VISITORS TO THE WESTERN CAPE FOR OUTDOOR ACTIVITIES, 2019



TYPE OF ACCOMMODATION USED BY VISITORS TO THE WESTERN CAPE FOR OUTDOOR ACTIVITIES, 2019

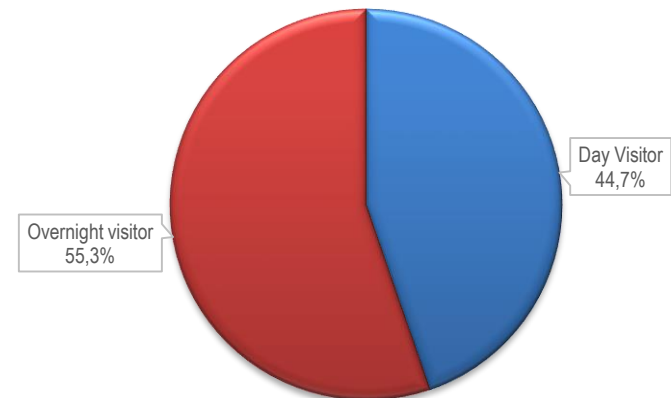




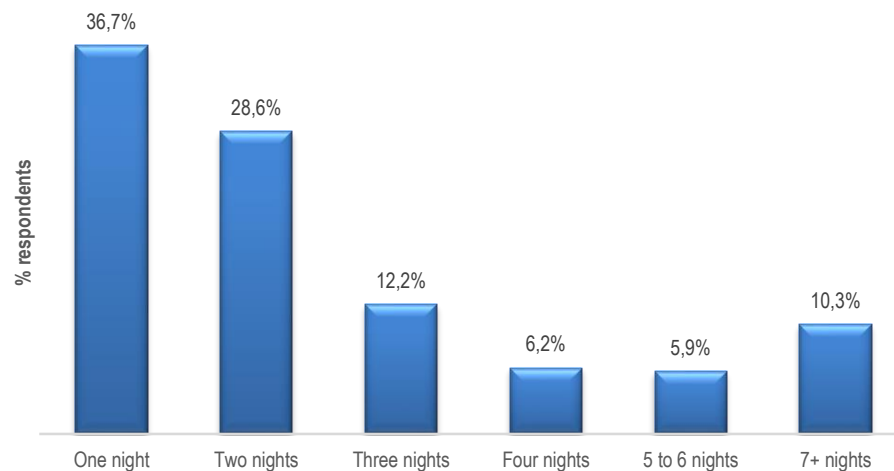
## 4.5 Western Cape Nature-based Tourism Visitor Trends

- Visitors to the Western Cape who enjoyed scenic drives indicated to be mostly overnight visitors (55,3%), similar to overnight visitors to the Western Cape in general (53,4%). Visitors who enjoyed scenic drives are likely to also embark on day excursions, with 44,7% of respondents representing the day visitor market in 2019.
- Overall overnight visitors to the Western Cape were likely to spend two nights (32,2%) or one night (30,0%) in the destination. Those who undertook scenic drives spent a slightly shorter time in the destination with 36,7% of respondents indicating to have spent one night in the destination.
- Following the same trend as outdoor activities, self catering, guesthouse, B&B and hotel were amongst the top accommodation choices for respondents who enjoyed scenic drives in the Western Cape.

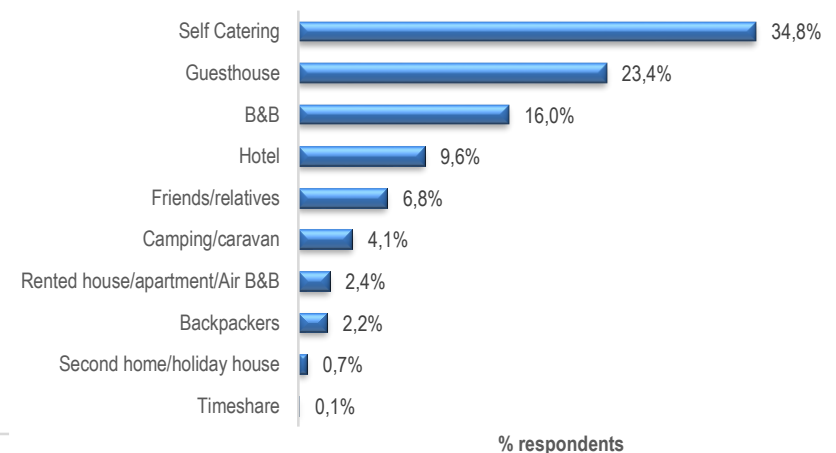
OVERNIGHT & DAY VISITORS TO THE WESTERN CAPE FOR SCENIC DRIVES, 2019



AVERAGE LENGTH OF STAY OF OVERNIGHT VISITORS TO THE WESTERN CAPE FOR SCENIC DRIVES, 2019

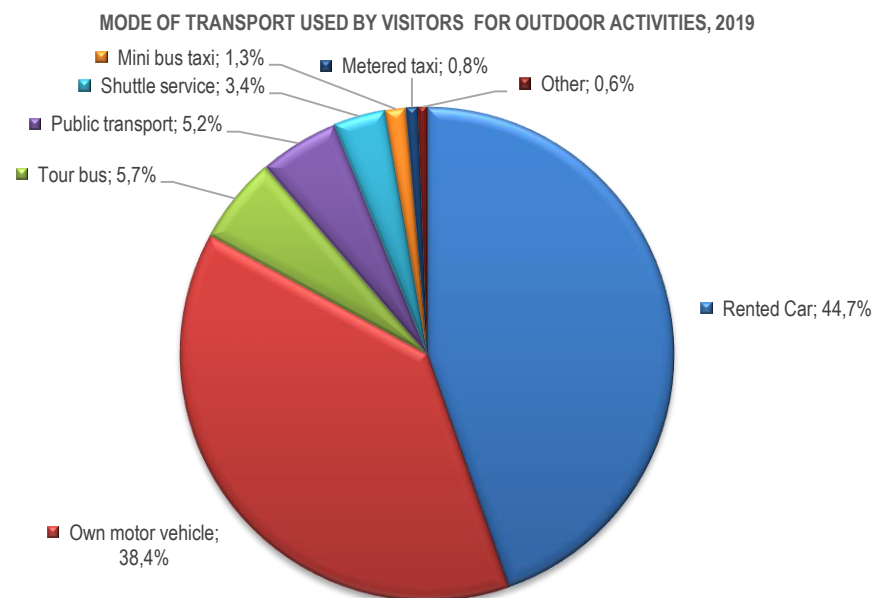


TYPE OF ACCOMMODATION USED BY VISITORS TO THE WESTERN CAPE FOR SCENIC DRIVES, 2019



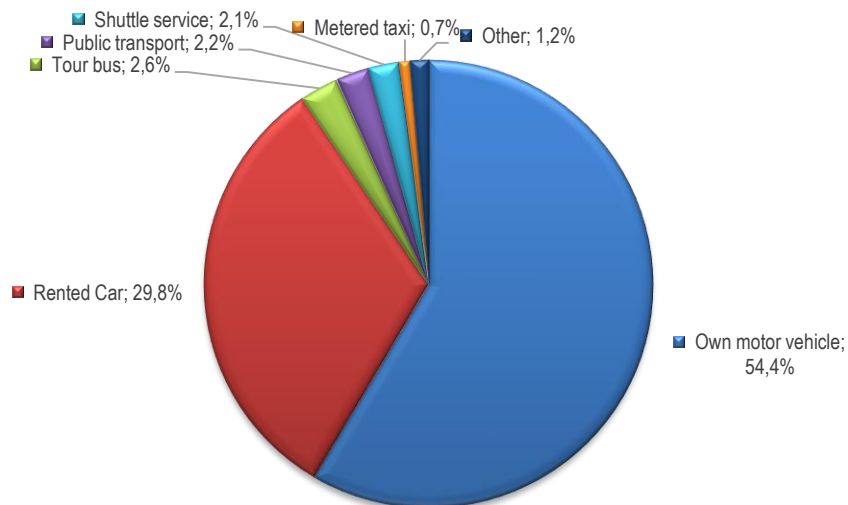
## 4.5 Western Cape Nature-based Tourism Visitor Trends

- The vast majority of respondents who engaged in outdoor activities indicated to have travelled by rented car (44,7%) or via their own motor vehicles (38,4%).
- This suggests that visitors who engage in outdoor activities prefer to explore on their own rather than with a tour guide.
- Nearly two thirds(65,3%) of overseas visitors travelled via rented cars when engaging in outdoor activities and 8,4% made use of tour busses.
- The vast majority (86,1%) of domestic visitors made use of their own vehicles when travelling for outdoor activities and 5,9% used rented cars.



- Those who took scenic drives were likely to do so via their own motor vehicles (54,4%) or rented cars (29,8%).
- Overseas visitors (66,9%) were more likely to use rented cars and 5,7% of overseas respondents enjoyed scenic drives via tour busses.
- Domestic visitors preferred using their own motor vehicles (84,8%) when embarking on scenic drives and a further 5,7% made use of rented cars.

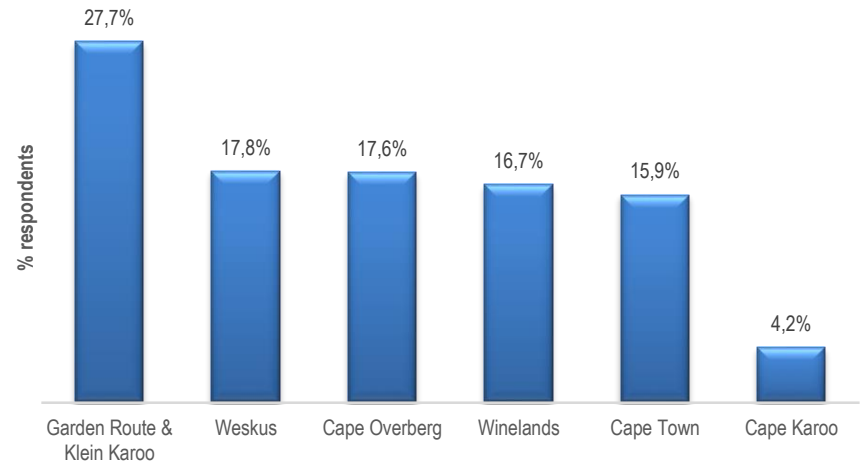
**MODE OF TRANSPORT USED BY VISITORS TO THE WESTERN CAPE FOR SCENIC DRIVES, 2019**



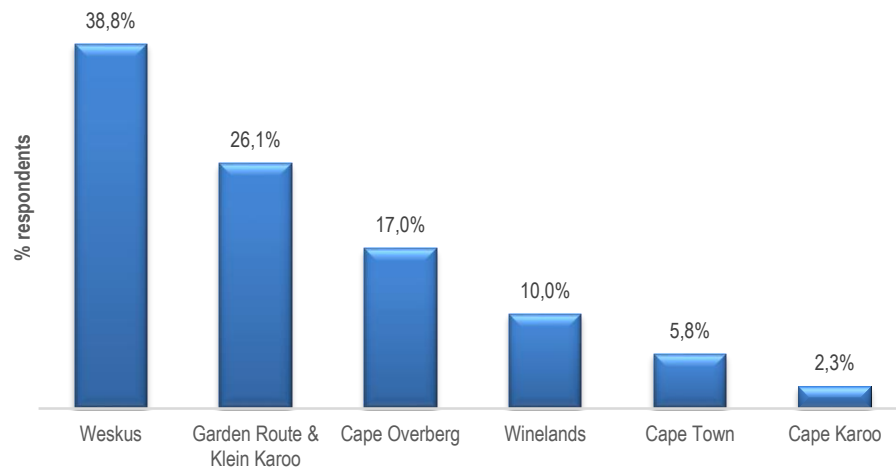
## 4.5 Western Cape Nature-based Tourism Visitor Trends

- The most visited region for outdoor activities in 2019 was the Garden Route & Klein Karoo (27,7%).
- This is not surprising as the Garden Route & Klein Karoo is a place of immense natural beauty, offering an abundance of outdoor and nature activities.
- Known for its beautiful flowers as well as an abundance of outdoor activities, Weskus (17,8%) was the second most visited region for outdoor activities.
- The Overberg region (17,6%), with its many beaches and nature-based activities was also a popular destination for outdoor activities.

WESTERN CAPE REGIONS VISITED FOR OUTDOOR ACTIVITIES, 2019



WESTERN CAPE REGIONS VISITED FOR SCENIC DRIVES, 2019



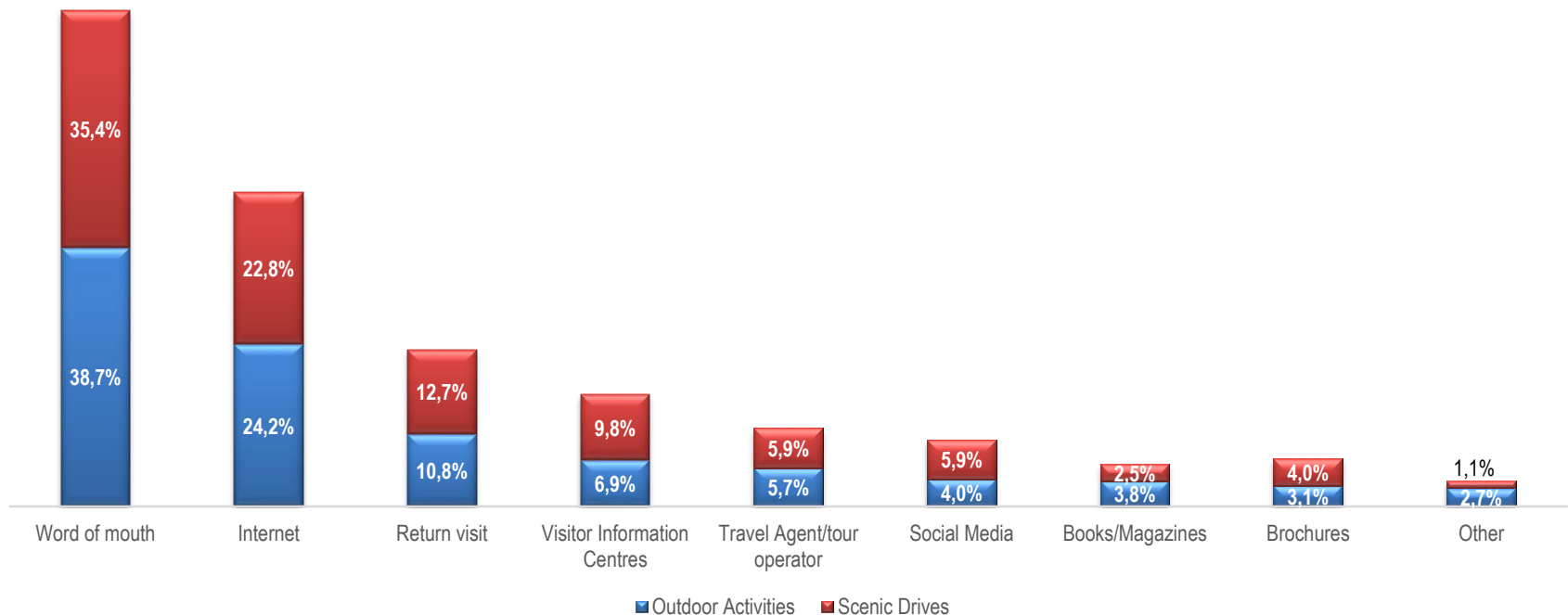
- The flower kingdom, Weskus, was the most popular destination for scenic drives with 38,8% of respondents travelling to the region to enjoy its scenic beauty.
- Weskus was particularly appealing to domestic visitors with 52,1% of domestic respondents visiting the region for scenic drives.
- The Garden Route & Klein Karoo (26,1%) and Cape Overberg (17,0%) were also popular choices for scenic drives in the province.



## 4.5 Western Cape Adventure Tourism Visitor Trends

- According to respondents, word of mouth (38,7%), and the internet (24,2%) holds the greatest return on investment as effective marketing tools. From these trends an evident shift can be seen from marketing collateral to online platforms.
- Word of mouth (35,4%), and the internet (22,8%) were the most common sources of information used by visitors who took scenic drives in the Western Cape. Return visits (12,7%) were also popular highlighting the desirability of the Western Cape as a place of scenic beauty and wide open spaces.
- Over 60% of respondents who enjoyed scenic drives were from the domestic market. Trends confirm that the local market is extremely loyal and prefer returning to destinations they have visited on a previous trip.

SOURCE OF INFORMATION USED BY VISITORS TO THE WESTERN CAPE FOR OUTDOOR ACTIVITIES & SCENIC DRIVES, 2019





📍 Elgin, Cape Overberg



**Opportunities for nature tourism from European Markets**



## 5. Opportunities for Nature Tourism from European Markets

- Based on the findings from our visitor trends surveys, Europeans are the dominant international source market for the Western Cape. This section aims to provide insights into the opportunities for nature-based tourism from Europe according to reports published by the Centre for the Promotion of Imports from developing countries (CBI).
- The European market is one of the largest source markets for long-haul destinations such as the Western Cape, and Europeans are increasingly seeking new and authentic destinations to experience its culture and nature.
- In an increasingly digitally connected and work-centric world, more and more travellers are seeking their own individual meaning by reconnecting with nature and host communities. It is expected that the post COVID-19 traveller will be looking for experiential holidays that offers engagement with communities, nature and culture. In addition, sustainable tourism and care for the environment is expected to grow substantially. After seeing the impact of the pandemic worldwide, people are likely to be more cognizant of making ethical travel choices.
- In 2018, Germany, France, Netherlands, Belgium, Poland and the Czech Republic had the biggest share of outbound trips with nature as the primary motive for choosing a holiday destination. Germany leads with an estimated 16 million outbound overnight trips with nature as a primary motive for travel.
- Germany – 15% of German travellers cited nature as their main reason for visiting a destination and 25% of them consider it to be a reason to return to the destination. For long holidays (13+ nights) most Germans prefer purchasing the components of their holidays separately and by themselves. Booking commercial services online, through someone they know or over the counter at a travel agency are their most popular booking methods. When planning their holiday, Germans are mostly influenced by recommendations from friends, family and colleagues, or their own personal experience.
- France – 14% of French travellers mention nature as their primary motive for visiting a destination, however, 36% consider natural features such as landscape and weather conditions as one of the most important reasons to return to the destination. Package holidays are the most preferred holiday format for French travellers regardless of duration and most holidays are purchased online via tour operators or airline companies. They are mostly influenced by recommendations by friends, colleagues and relatives when planning their holidays.
- Netherlands – 25% of Dutch travellers consider nature as the primary reason to visit a destination and 53% of them regard it as the main reason to return to the destination. Most Dutch travellers prefer to arrange long holidays themselves and booking online via tour operators or airline companies. When making travel purchase decisions, they are mostly influenced by recommendations from others.
- Belgium – 19% of Belgian travellers regard nature as the primary reason to visit a destination, while 51% mention it as the main reason to return to the destination. For long holidays, Belgians are equally interested in package deals and purchasing tourist services separately via online commercial services such as tour operators or airline companies. They most often rely on recommendations from family, friends and colleagues when planning their holidays.



## 5. Opportunities for Nature Tourism from European Markets

- Poland – 19% of Polish travellers see nature as the primary reason to visit a destination and 58% regard it as the main reason to return. Polish travellers prefer purchasing long holidays themselves using online commercial services such as tour operators and airline companies. They rely heavily on recommendations from family, friends and colleagues when making travel decisions.
- Czech Republic – 26% of Czech travellers consider nature to be the primary reason to visit a destination and 59% regard it as the main reason to return. Most Czech travellers prefer package deals for long holidays and they are likely to book via someone they know, or online commercial services such as private housing individuals, tour operators or airlines. Recommendations by friends, colleagues and relatives are important sources of information for Czech travellers.
- The Centre for the Promotion of Imports from developing countries (CBI) encourages tourism businesses interested in the nature-based tourism market to:
  - Act sustainably and be transparent while promoting recycling and waste management initiatives.
  - Make ways available for visitors to contribute to the natural and social values of the destination and reduce their impact.
  - Develop tailor-made products to fit the local context.
  - Combine nature-based tourism with other types of leisure activities to provide an attractive offer. This can be done by creating routes and packages connecting points of interest.
- Eco-tourists are generally quite independent and decisive, often arranging their travel itineraries themselves. It is therefore vital for local tourism providers to ensure that they have a good online presence targeting this group and meeting their needs.

Sources: CBI, 2020



## 6. Key Findings

- Europeans are the dominant international source market for the Western Cape and 7 out of the top 10 international markets who enjoyed outdoor activities and scenic drives in the Western Cape originated from the continent.
- The Western Cape was the most popular province for visiting natural attractions in 2018, with +- 70% share of tourists visiting natural attractions. In addition visiting natural attractions ranked as the second most popular activity undertaken by visitors to the Western Cape, according to South African Tourism.
- The strength of international visitors engaging in outdoor activities is evident in the Western Cape, with 61% of survey respondents originating from the overseas market. Scenic drives are more common amongst domestic travellers, with 60,6% of survey respondents who undertook scenic drives originating from the domestic market. In 2019, scenic drives was listed as the most common activity enjoyed by visitors to the Western Cape, followed by culture & heritage and outdoor activities.
- From the domestic market, the Western Cape (60,4%), Gauteng (15,4%) and Kwazulu-Natal (5,8%) ranked as the top three provinces who embarked on outdoor activities, and the Western Cape (66,1%), Gauteng (14,7%) and Eastern Cape (5,2%) were the top three source provinces of visitors who took scenic drives in the province. The high number of Western Cape locals engaging in outdoor activities and scenic drives within their province indicates that local tourism also remains a very important market for the tourism sector, particularly due to the many economic challenges the market is facing post COVID-19.
- The most visited region for outdoor activities in 2019 was the Garden Route & Klein Karoo. In 2019, 27,7% of visitor survey respondents who engaged in outdoor activities in the Western Cape indicated to have done so in this region. Visitors who enjoyed scenic drives were most likely to do so in the Weskus region (38,8%).
- The vast majority of respondents who engaged in outdoor activities indicated to be between the ages of 36 – 50 years (41,2%), 51 – 70 (27,2%) and 21 – 35 years (24,0%). Similarly, those who took scenic drives were mostly aged 36 – 50 years (41,0%), 51 – 70 years (31,4%) and 21 – 35 years (18,7%). They are most likely to travel in groups of 3, groups of 4, or in pairs.
- In an increasingly digitally connected and work-centric world, more and more European travellers are seeking new and authentic destinations to experience its culture and nature. It is expected that the post COVID-19 traveller will be looking for experiential holidays that offers engagement with communities, nature and culture. In addition, sustainable tourism and care for the environment is expected to grow substantially.
- Germany, France, Netherlands, Belgium, Poland and the Czech Republic are considered to be the most relevant nature and ecotourism markets in Europe. Germany led with 16 million outbound overnight trips with nature as a primary motive for travel.
- Tourism businesses are encouraged to act sustainably and be transparent, make ways available for visitors to contribute to the natural and social values of the destination and reduce their impact. They are further encouraged to develop tailor-made products to fit the local context, combine nature-based tourism with other types of leisure activities to provide an attractive offer, and ensure that they have a good online presence targeting this group and meeting their needs.

## 7. List of Sources

- South African Tourism
- Wesgro Primary Research
- CBI (Centre for the Promotion of Imports from developing countries)
- United Nations World Tourism Organization (UNWTO)
- Booking.com, *Where sustainable travel is headed*, 2018
- Booking.com, *Sustainable Travel Report*, 2019





**WesGRO**  
cape town & western cape  
research

An inspiring place to know