



Wellness Tourism Trends

2020

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1. Methodology

This report provides an overview of the tourism trends and patterns amongst visitors who visited the Western Cape for health and wellness. 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 Wellness 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. This report focuses on the **223** respondents who listed health & wellness as one of their main activities, from the following participating regions:

Cape Garden Route	167
Cape Karoo	1
Cape Overberg	18
Weskus	23
Winelands	13
Cape Town	1



3. Overview of Wellness Tourism

- The United Nations World Tourism Barometer (UNWTO) defines Wellness Tourism as “a type of tourism activity which aims to improve and balance all of the main domains of human life including physical, mental, emotional, occupational, intellectual and spiritual. The primary motivation for the wellness tourist is to engage in preventive, proactive, lifestyle-enhancing activities such as fitness, healthy eating, relaxation, pampering and healing treatments.”
- The Global Wellness Institute (GWI) estimated the global wellness tourism market to be valued at US\$639 billion in 2017. According to its 2018 Global Wellness Tourism Economy report, ‘wellness tourism is a fast-growing tourism segment that has been growing by 6.5% annually from 2015-2017 (more than twice the growth rate for tourism in general). Travellers made 830 million wellness trips in 2017, which is 139 million more than in 2015. Growth has been driven by an expanding global middle class, growing consumer desire to adopt a wellness lifestyle, rising interest in experiential travel, and increasing affordability of flights and travel options’.
- The wellness tourism market includes two types of travellers: primary wellness travellers, whose main purpose of trip is for wellness activities (e.g. someone participating in a yoga retreat); and secondary wellness travellers, who seek to maintain wellness or engage in wellness activities during any kind of travel (e.g. someone who gets a massage or prioritizes healthy food while on a trip). The bulk of wellness tourism is done by secondary wellness travellers, who account for 89% of wellness tourism trips and 86% of expenditures in 2017. Secondary wellness tourism also continues to grow at a faster rate than primary wellness tourism, at 10% compared to 8% annually, from 2015-2017.
- South Africa held the biggest share of wellness trips in Sub-Saharan Africa in 2017 with 1,5 million international and 2,5 million domestic trips with a total expenditure of US\$2,25 billion.
- The COVID-19 pandemic sent many people into lockdown throughout 2020 and with it emerged a greater focus on overall health and well-being. It is likely that many people will start to seek out connection and ways to reconnect with nature. Retreats which combine wellness travel offerings with the outdoors are an obvious choice. Since before the pandemic many wildlife resorts in South Africa have established on-site wellness facilities and safari holiday providers are increasingly incorporating wellness practices as part of their itinerary.
- South Africa boasts a well-established spa industry as well as a significant number of hot spring resorts which offers great potential to attract the wellness traveller. Combined with an abundance of natural beauty and wide open spaces, the country offers a myriad of wellness experiences for both domestic and international travellers.
- The COVID-19 pandemic has made ever more apparent GWI’s prediction in their 2017 report that “future wellness travellers will increasingly link personal transformation with the connections they make during travel and their impacts on the people and the places that they touch. Wellness travel will become a more meaningful two-way exchange between the travellers and the destination, instead of a one-sided consumptive and commercial transaction. This consumer evolution, along with the development of wellness tourism, can play an important role in mitigating the negative impacts of over-tourism in some popular destinations and regions” (GWI, 2017).



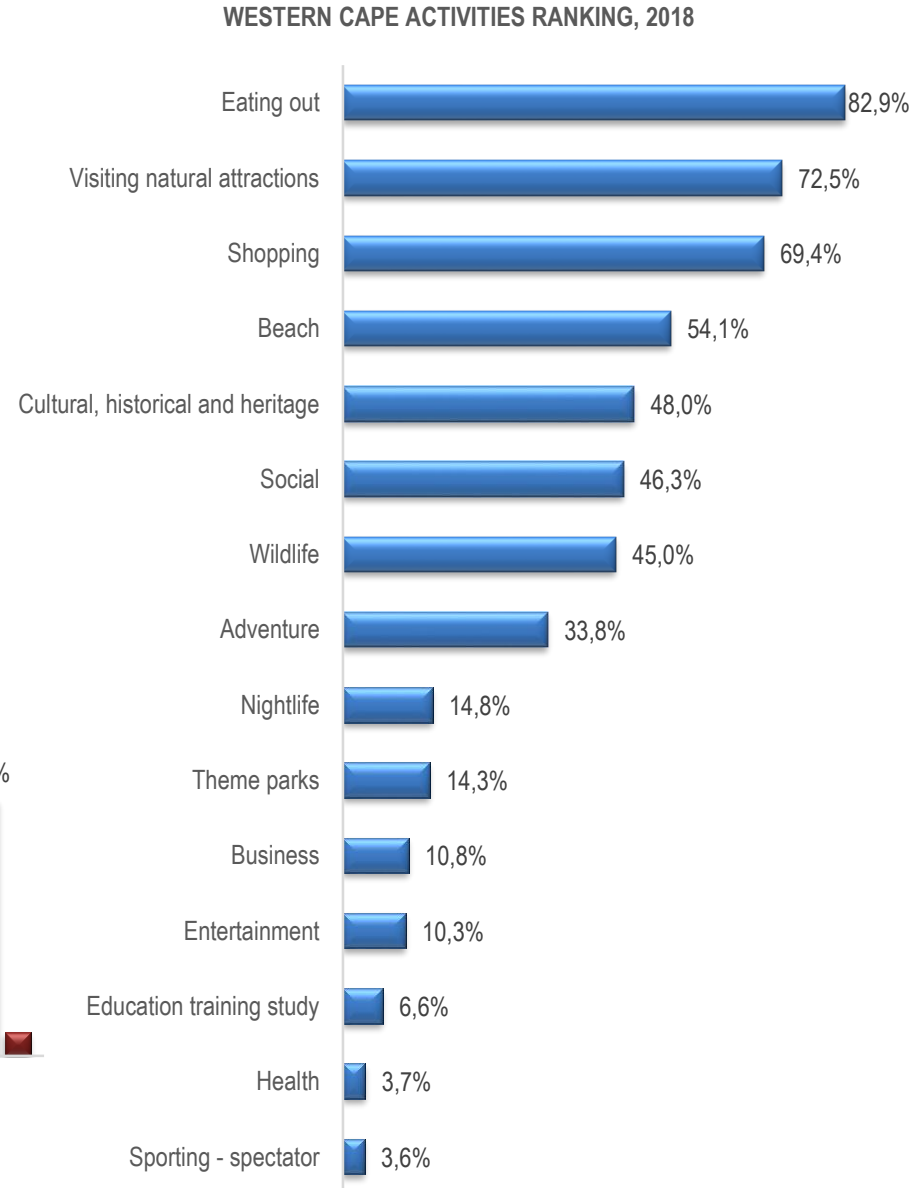
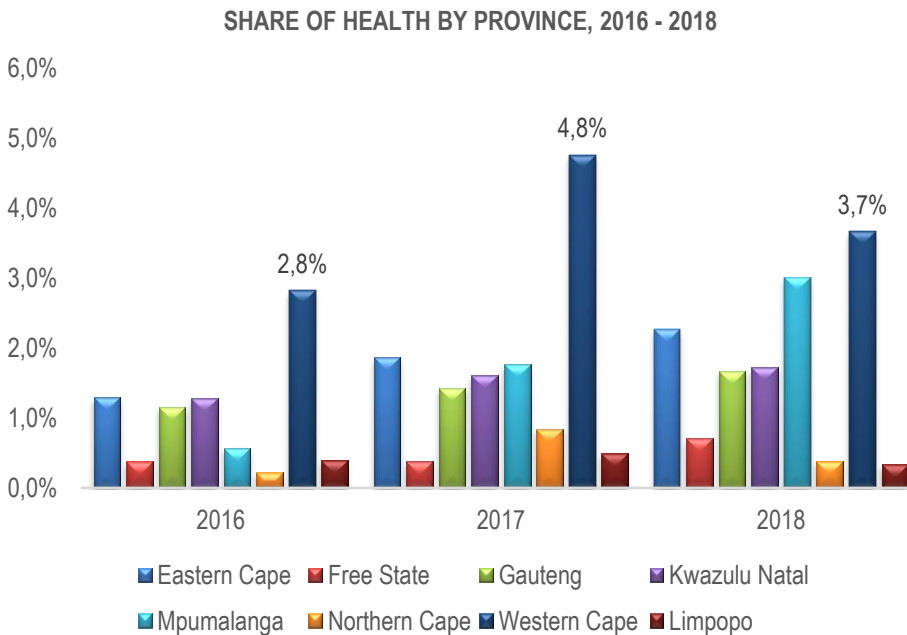
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Wellness Tourism Visitor Trends Analysis

4.1 Health & Wellness Tourism Activities by Province

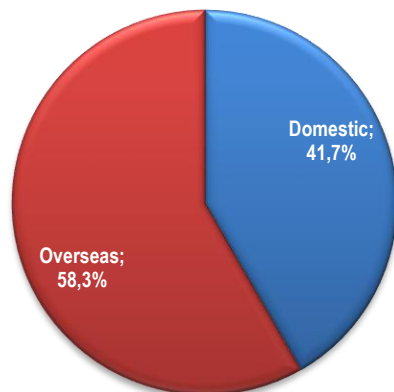
- By province, the Western Cape held the strongest share of international tourist arrivals who indicated 'health' as one of their main activities from 2016 to 2018.
- In addition 'health' ranked amongst the top 15 activities undertaken by South African Tourism (SAT) survey respondents in the Western Cape in 2018.



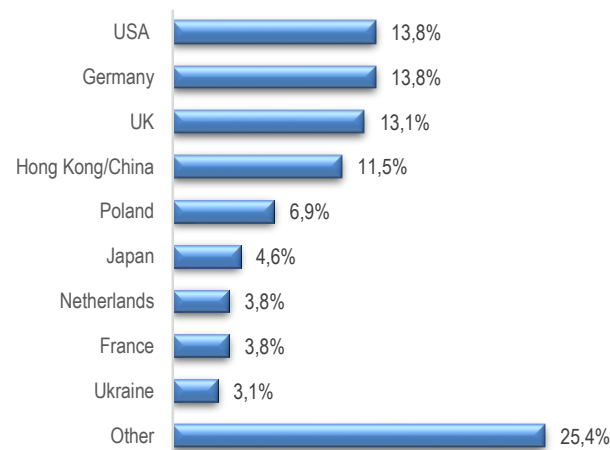
4.2 Wellness Tourism Activities in the Western Cape

- Overseas travellers make up the majority of visitors travelling to the Western Cape for health & wellness, with 58,3% of survey respondents who undertook health & wellness activities originating from the overseas market and 41,7% from the domestic market.
- As the leading source region for the Western Cape, Europe continues to dominate amongst overseas travellers with 6 out of the top 9 international markets travelling to the province for health & wellness originating from the continent.
- The Western Cape's top North American market, the United States, ranked as the top international source market for health & wellness along with Germany.
- From the domestic market, the Western Cape (45,2%), Mpumalanga (14%) and Kwazulu-Natal (12,9%) ranked as the top three source provinces for visitors travelling for health & wellness.
- The high percentage share coming from the Western Cape indicates that many locals are travelling to different regions within the province for health & wellness activities which includes short breaks and spa getaways.

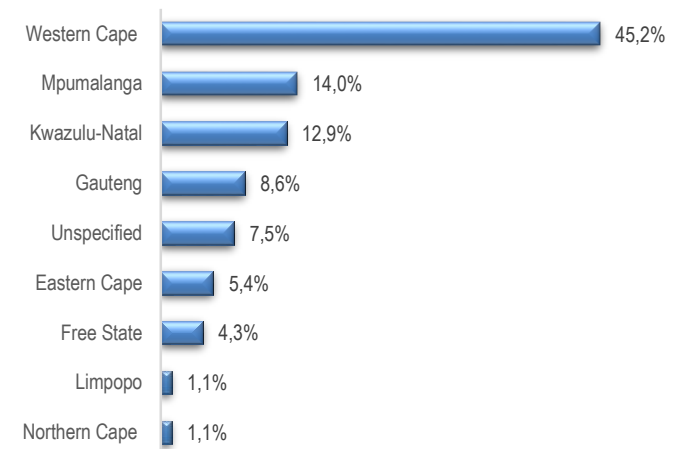
ORIGIN OF VISITORS TO THE WESTERN CAPE FOR HEALTH & WELLNESS, 2019



TOP INTERNATIONAL SOURCE MARKETS TO THE WESTERN CAPE FOR HEALTH & WELLNESS, 2019



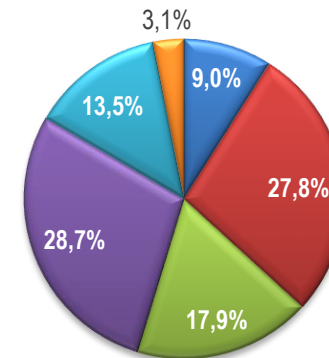
% SHARE OF DOMESTIC SOURCE MARKETS TO THE WESTERN CAPE FOR HEALTH & WELLNESS, 2019



4.3 Western Cape Wellness Tourism Visitor Trends

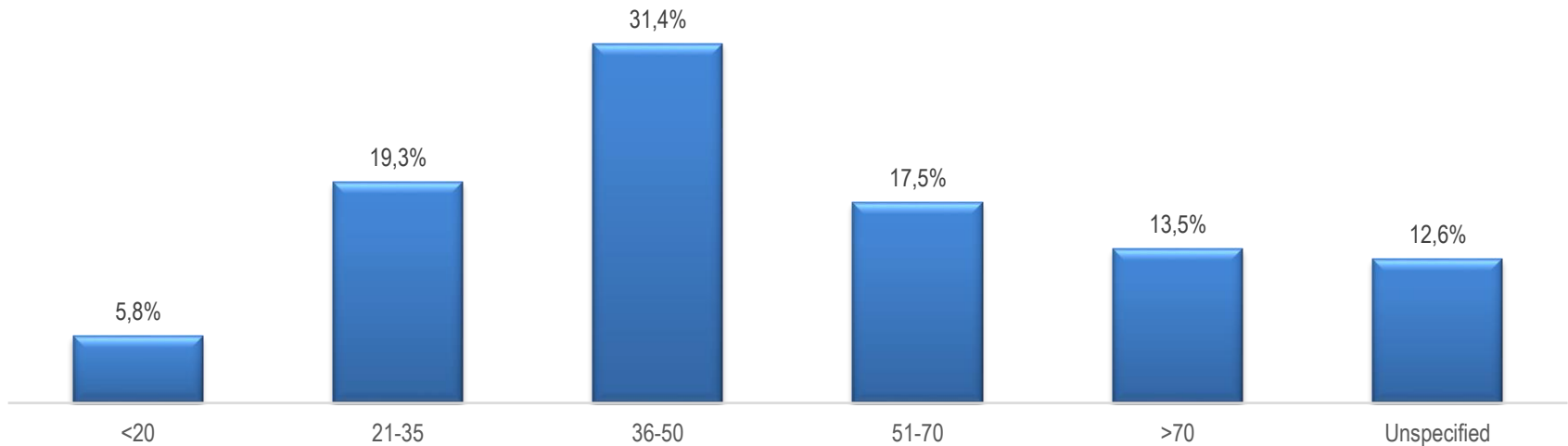
- The majority of respondents who visited for health & wellness indicated to have travelled in groups of four (28,7%), in pairs (27,8%) or in groups of three (17,9%).
- Close to a third of respondents who travelled for health & wellness indicated to be between the ages of 36 and 50 years and a fifth of respondents were between the ages of 21 and 35 years. A further 17,5% of respondents were in the 51 – 70 years age category.

GROUP SIZE OF VISITORS TO THE WESTERN CAPE FOR HEALTH & WELLNESS, 2019



■ One ■ Pairs ■ Groups of 3 ■ Groups of 4 ■ Groups of 5+ ■ Unspecified

AGE CATEGORIES OF VISITORS TO THE WESTERN CAPE FOR HEALTH & WELLNESS, 2019



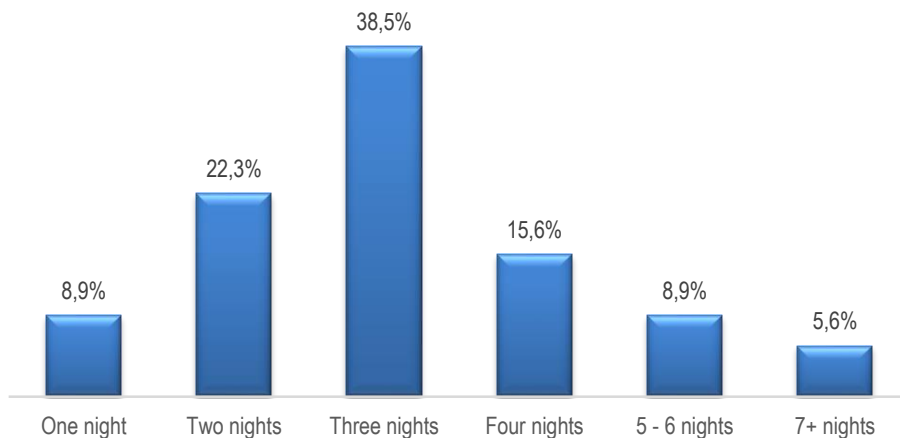
4.3 Western Cape Wellness Tourism Visitor Trends

- Four fifths of wellness travellers to the Western Cape indicated to be overnight visitors in 2019, which is significantly higher than the 53% of overnight visitors to the province in general.
- Those who stayed overnight spent an average of two nights (22,3%), three nights (38,5%), or four nights (15,6%) in the destination.
- This trend underlines the Western Cape's desirability for both long stays as well as the popularity of short breaks for locals.
- A third of respondents said that they spent between R501 and R1000 on accommodation and a further 25% said they spent between R1001 and R2000 on average.

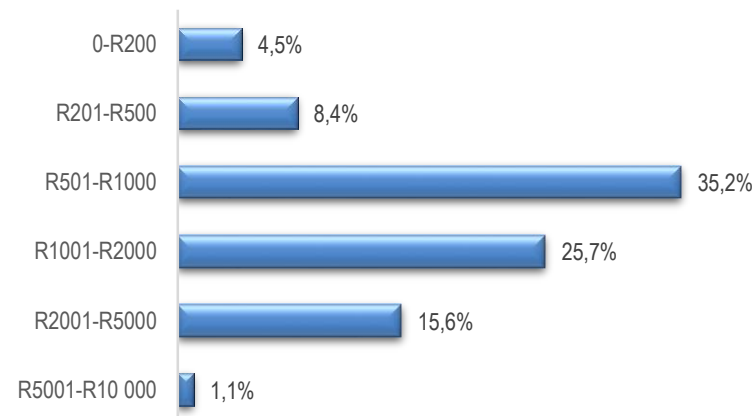
OVERNIGHT & DAY VISITORS TO THE WESTERN CAPE FOR HEALTH & WELLNESS, 2019



AVERAGE LENGTH OF STAY OF OVERNIGHT VISITORS TO THE WESTERN CAPE FOR HEALTH & WELLNESS, 2019



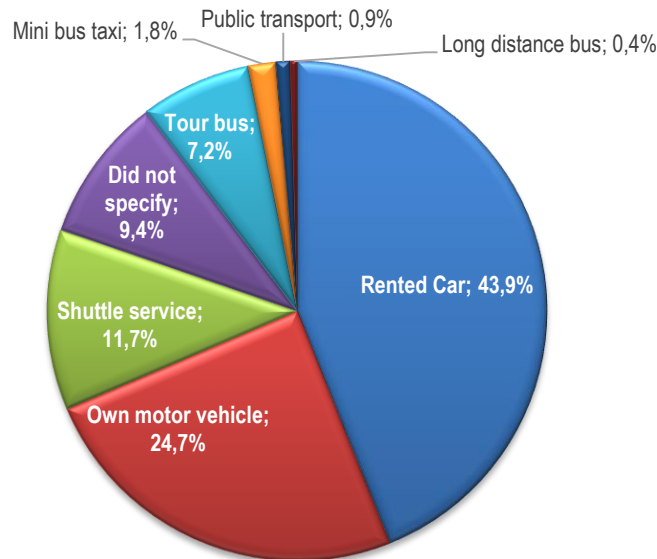
AVERAGE ACCOMMODATION SPEND OF OVERNIGHT VISITORS TO THE WESTERN CAPE FOR HEALTH & WELLNESS, 2019



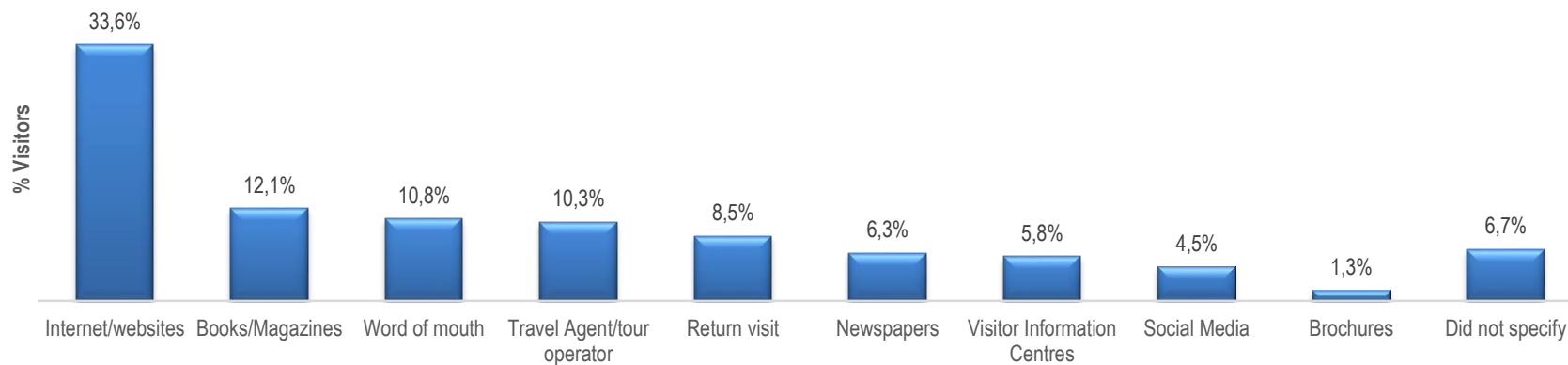
4.3 Western Cape Wellness Tourism Visitor Trends

- The vast majority of respondents who visited for health & wellness travelled via rented car (43,9%) or with their own vehicle (24,7%).
- According to respondents, browsing through websites on the internet (33,6%), books and magazines (12,1%) as well as word of mouth recommendations (10,8%) were the top advertising platforms used to gather information about the destination.
- Though there is a trend towards online platforms, magazine advertisements are particularly appealing and relevant to this market segment. The portion of respondents who selected books/magazines as their main source of information (12,1%) is notably higher when compared to the share of this category to the province in general (1,8%).

MODE OF TRANSPORT USED BY VISITORS TO THE WESTERN CAPE FOR HEALTH & WELLNESS, 2019



SOURCE OF INFORMATION USED BY VISITORS TO THE WESTERN CAPE FOR EDUCATION, 2019



5. Key Findings

- The global wellness tourism market was valued at an estimated US\$639 billion in 2017. According to GWI's 2018 Global Wellness Tourism Economy report, travellers made 830 million wellness trips in 2017, which is 139 million more than in 2015. Growth has been driven by an expanding global middle class, growing consumer desire to adopt a wellness lifestyle, rising interest in experiential travel, and increasing affordability of flights and travel options.
- South Africa held the biggest share of wellness trips in Sub-Saharan Africa in 2017 with 1,5 million international and 2,5 million domestic trips with a total expenditure of US\$2,25 billion.
- The COVID-19 pandemic has brought about a greater focus on overall health and well-being. It is likely that many people will start to seek out connection and ways to reconnect with nature. Retreats which combine wellness travel offerings with the outdoors are an obvious choice. South Africa and the Western Cape in particular, boasts a well-established spa industry as well as a significant number of hot spring resorts which offers great potential to attract the wellness traveller. Combined with an abundance of natural beauty and wide open spaces, the destination offers a myriad of wellness experiences for both domestic and international travellers.
- There was a close to even split between overseas (58,3%) and domestic (41,7%) in 2019 making wellness travel an important segment for all travelers. Nearly half of all domestic wellness travellers originated from the Western Cape which suggests that many locals are travelling to different regions within the province for health & wellness activities which includes short breaks and spa getaways. The United States and Germany ranked as the top international source markets to the province for health & wellness.
- Respondents who visited for health & wellness were most likely to travel in pairs or groups of three and four. Close to a third of respondents were between the ages of 36 and 50 years and a fifth of respondents were between the ages of 21 and 35 year. A further 17,5% of respondents were in the 51 – 70 years age category.
- Four fifths of wellness travellers to the Western Cape indicated to be overnight visitors in 2019, which is significantly higher than the 53% of overnight visitors to the province in general. Those who stayed overnight spent an average of two nights to four nights in the destination.
- According to respondents, browsing through websites on the internet, books and magazines were the most common tools used to find out more about the destination. Though there is a trend towards online platforms, magazine advertisements are particularly relevant to this market segment. The portion of respondents who selected books/magazines as their main source of information (12,1%) is notably higher when compared to the share of this category to the province in general (1,8%).

6. List of Sources

- South African Tourism
- Wesgro Primary Research
- 20 Adventure Travel Trends to watch in 2018, ATTA
- CBI (Centre for the Promotion of Imports from developing countries)
- UNWTO
- WYSE



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