



The United Nations World Tourism Organization (UNWTO) defines a wildlife experience as a type of tourism that involves interaction with wildlife in their natural habitats. This can include activities such as wildlife safaris, bird watching, marine wildlife tours, and any other experiences that allow visitors to observe, photograph, or engage with animals in the wild.

The focus is on appreciating and conserving biodiversity, with an emphasis on minimising human impact on ecosystems and promoting sustainable tourism practices. Wildlife experiences can be both land-based and marine-based, and they often aim to contribute to conservation efforts and local community development by providing economic incentives to protect wildlife and their habitats.



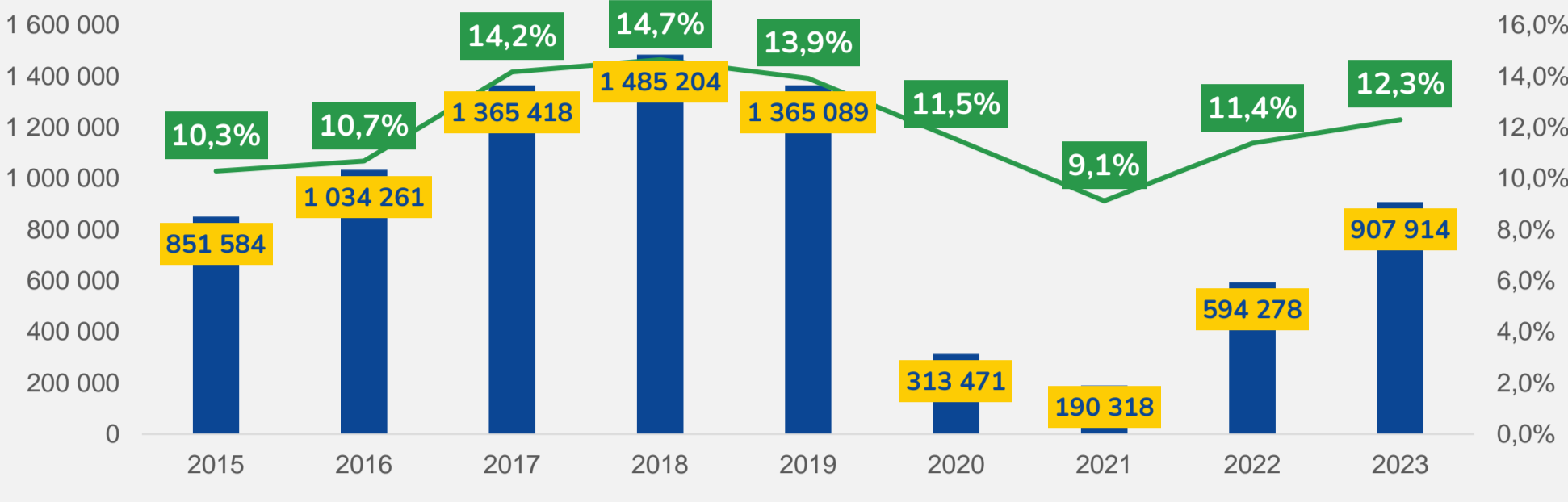
INCIDENCE OF WILDLIFE

Wildlife tourism market in South Africa

12%

The wildlife tourism market makes up a significant portion of South Africa's tourism industry, contributing around 12% of the country's tourists. However, it has not fully recovered post-pandemic, with 907,914 tourists in 2023, only 66.5% of the 2019 levels, down from the 1.5 million tourists in 2018.

Wildlife Market Incidence – Trended



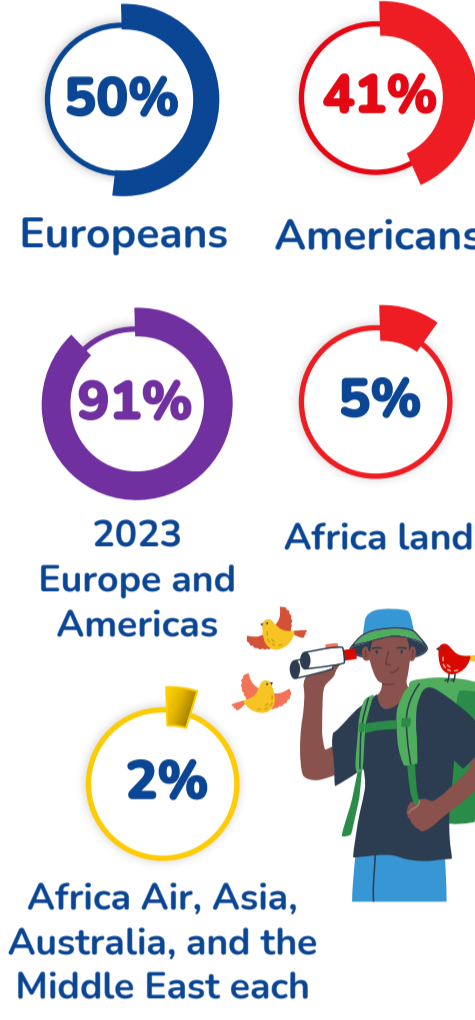
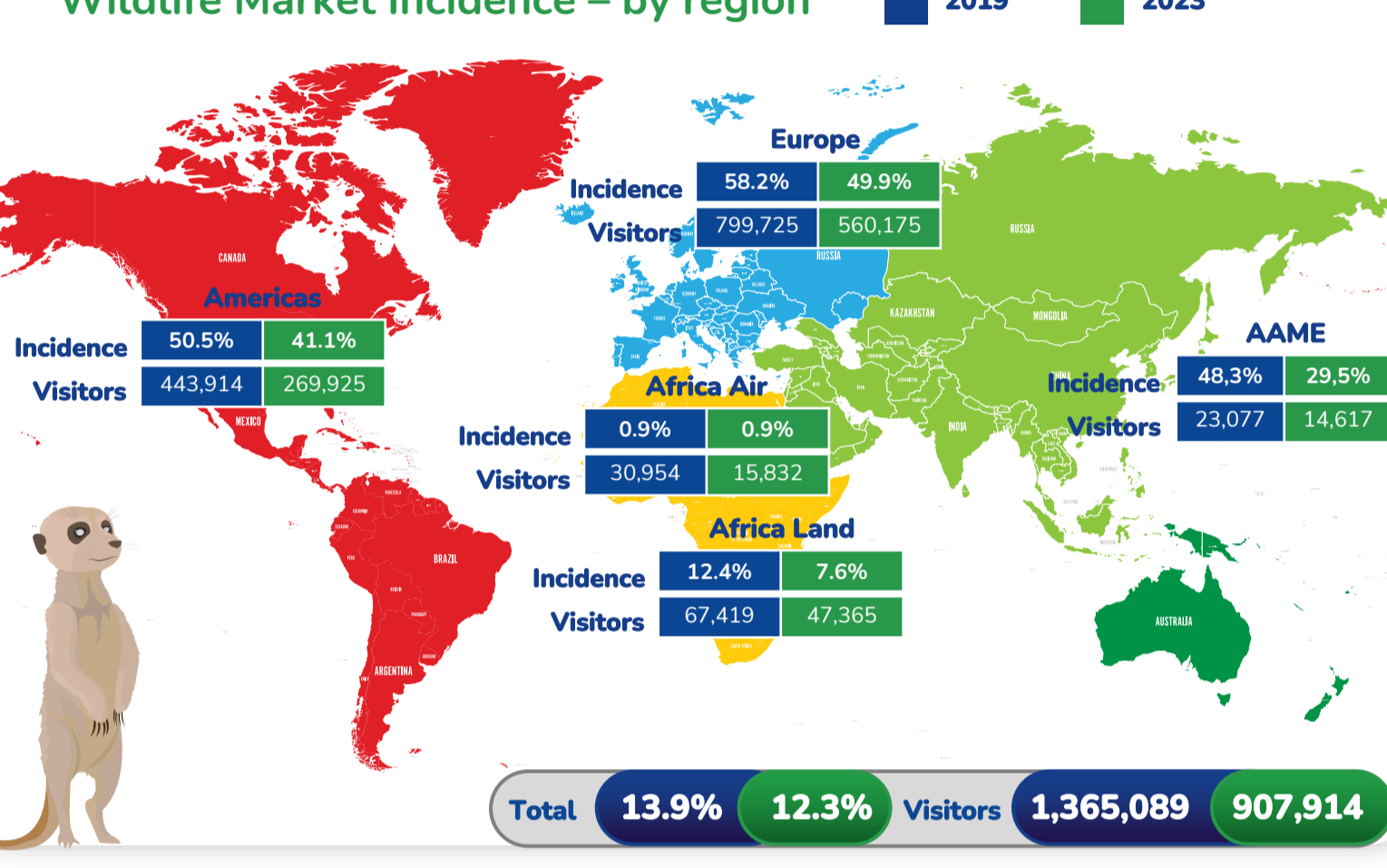
Sources: Departure Survey (Sample filtered based on Wildlife as an Activity)

Overseas tourists, especially from Europe and the Americas, are the primary sources of wildlife tourism in South Africa, with 50% of Europeans and 41% of Americans participating in wildlife activities in 2023. In comparison, tourists from Asia, Australasia, and the Middle East had a lower engagement rate at 30%.

In 2023, 91% of wildlife tourists in South Africa came from Europe and the Americas, contributing 830,100 out of 907,915 visitors.

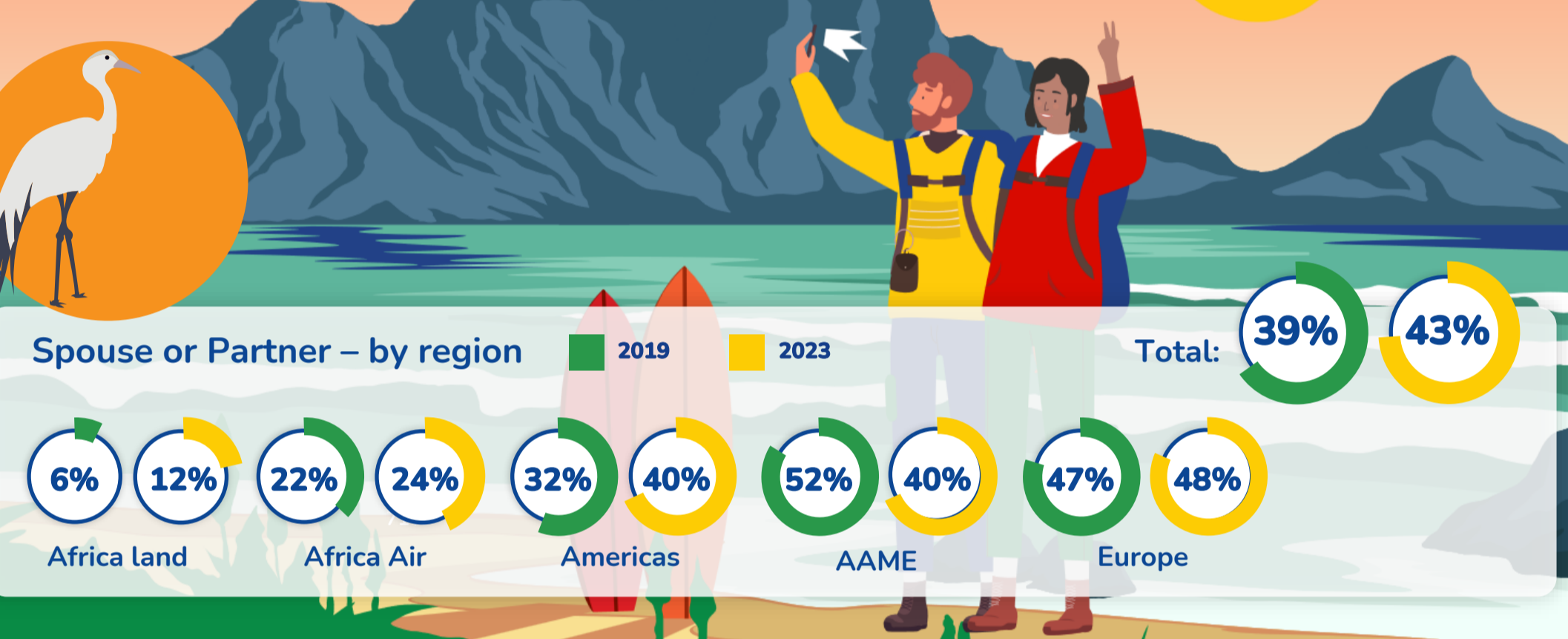


Wildlife Market Incidence – by region



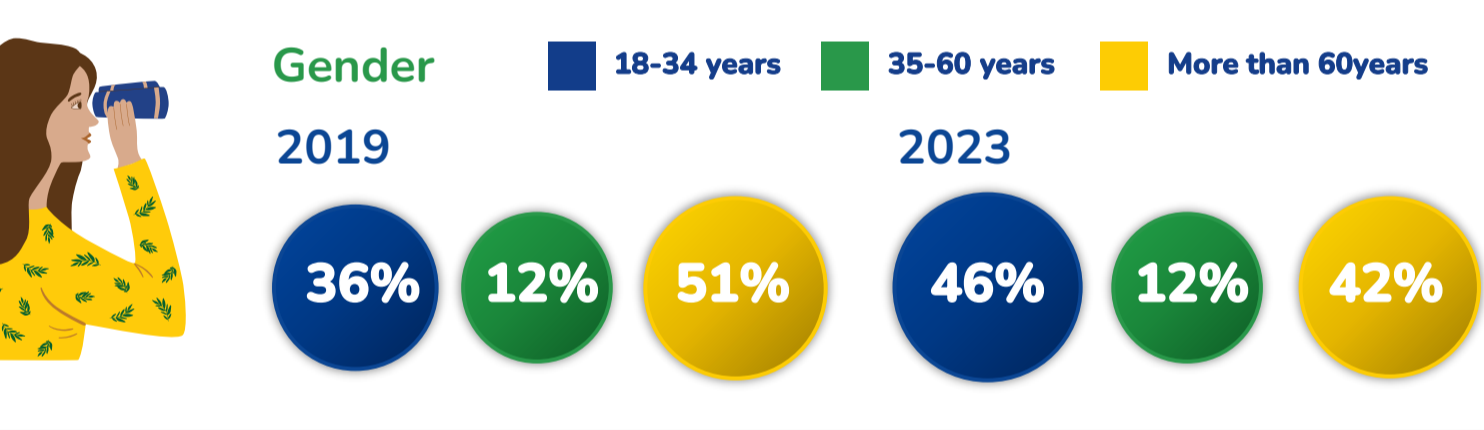
In 2023, Europeans led the trend of traveling with a spouse or partner, with nearly half of wildlife tourists traveling this way.

40% Wildlife tourists traveling as couples



In 2019, half of wildlife enthusiasts visiting South Africa were under 35. By 2023, this group had decreased to 42%, with nearly 60% of wildlife tourists now over 35 years old.

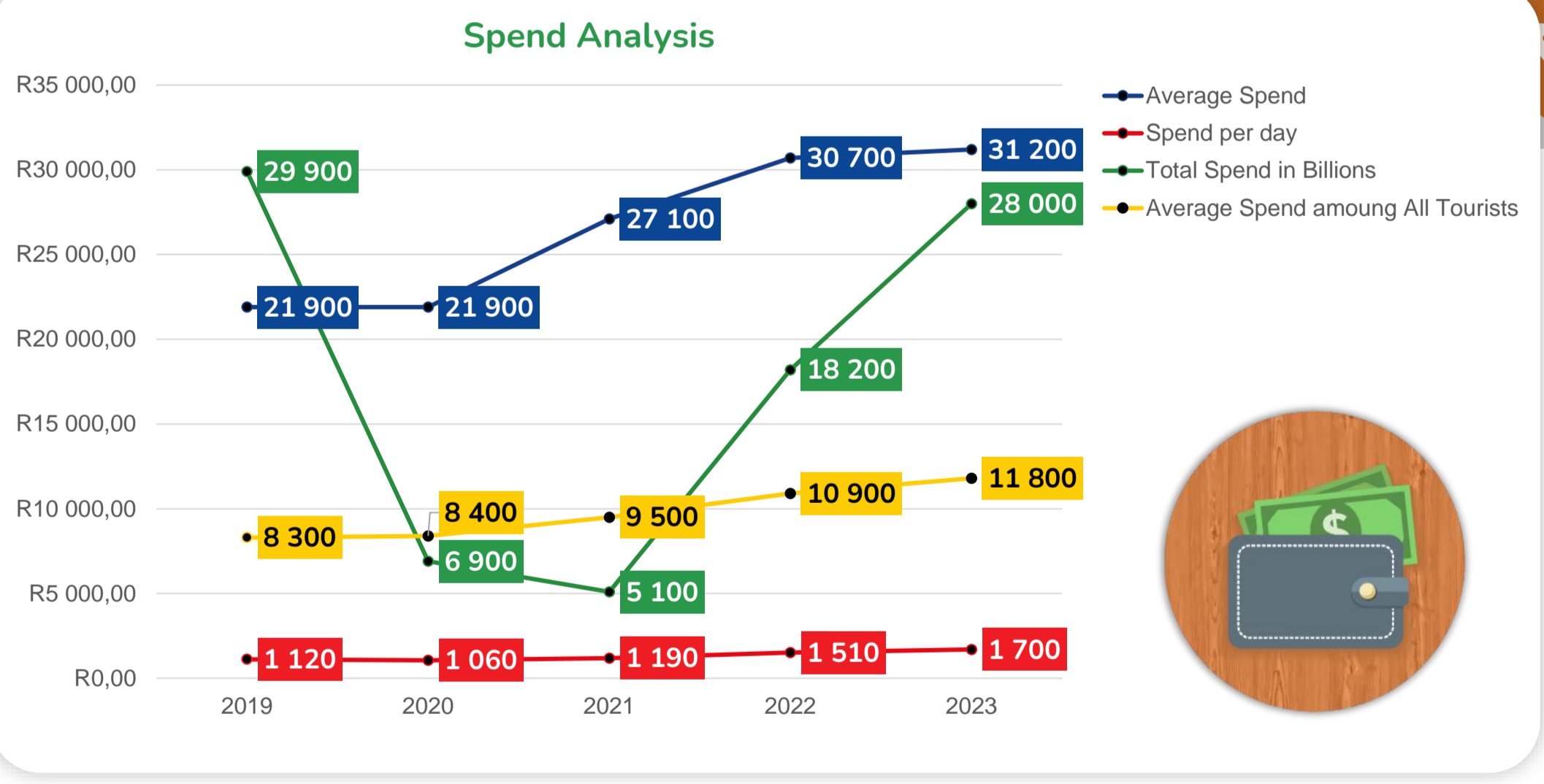
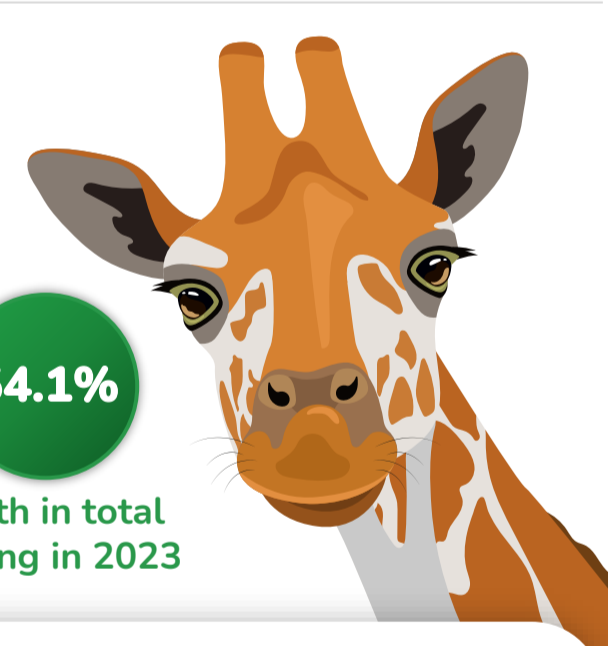
~60% of wildlife tourists now over 35 years old.



WILDLIFE SPEND PATTERNS

Wildlife tourists spend nearly three times more than the average visitor to South Africa. Their spending increased significantly in 2023, with an average total of R31,200 per tourist, or R1,700 per day, leading to a total spend of R28 billion. This represents a 1.6% rise in average spend, a 12.6% increase in daily spend, and a 54.1% growth in total spending compared to 2022.

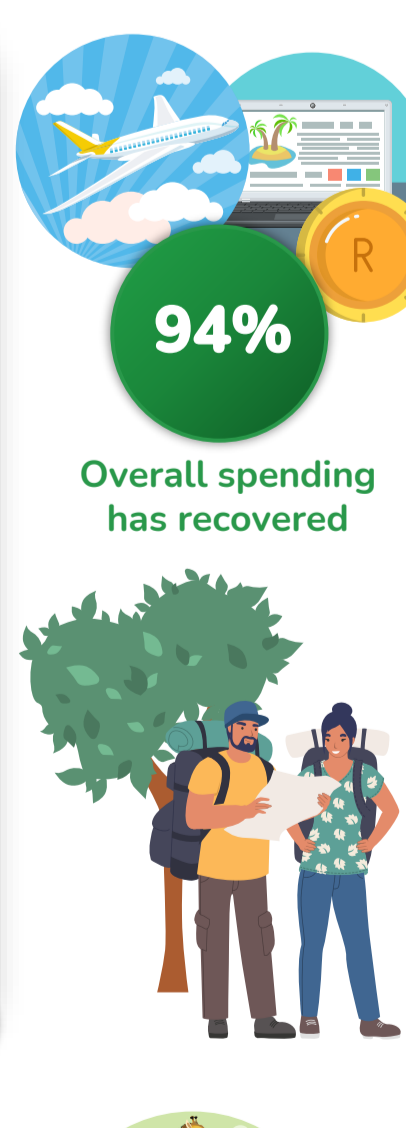
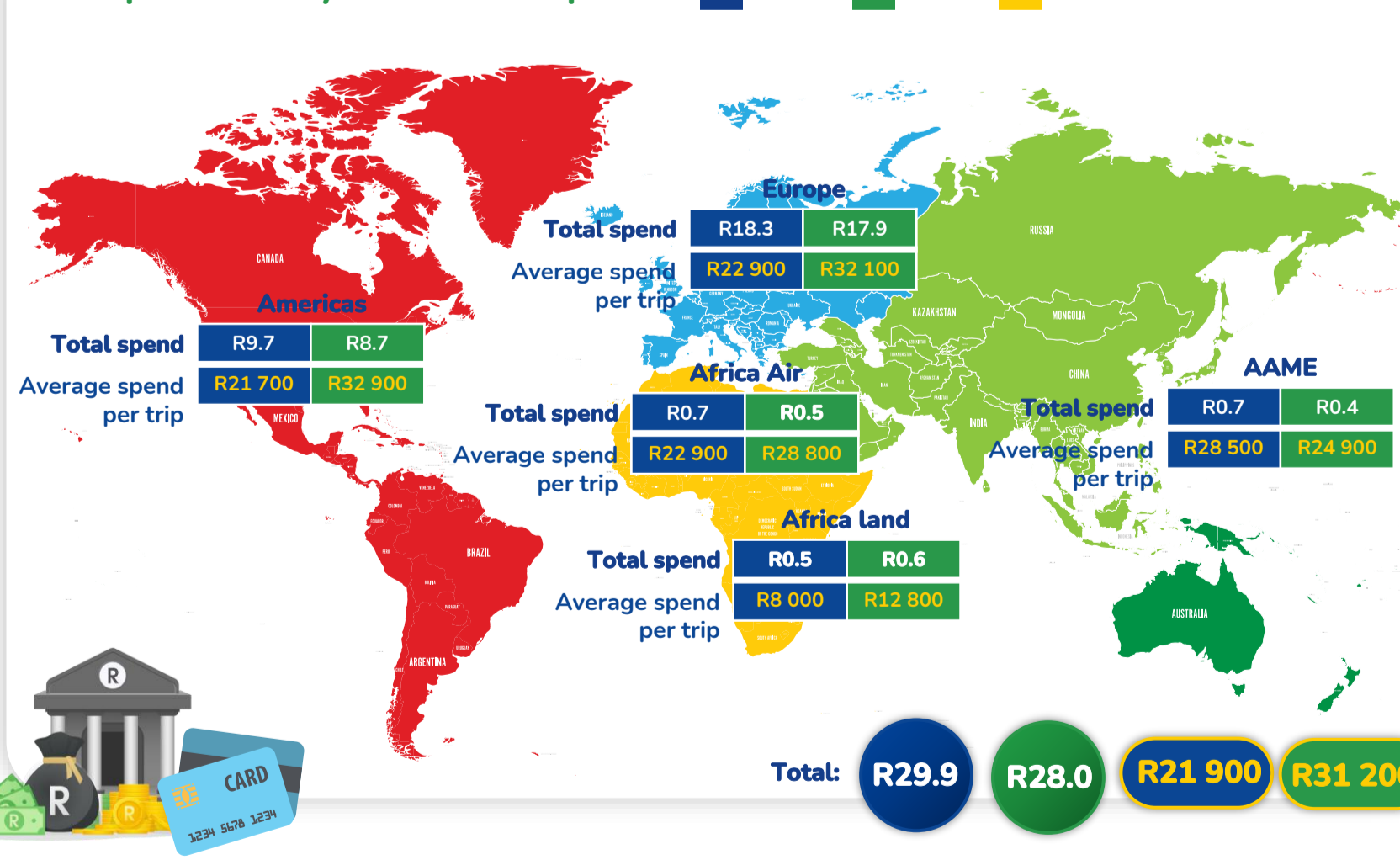
54.1% Growth in total spending in 2023



The Americas and Europe have the highest average spend per person, with the Americas at R32,900 and Europe at R32,100. Europe is driving the growth in spending, while other regions have reduced their spending compared to 2022. Overall, the average spend per wildlife tourist is stable, with declines in Africa Land and AAME offsetting any gains.

Overall, spending has recovered to 94% of pre-pandemic levels. The Americas and Europe are nearly back to 2019 levels, at 90% and 98% recovery, respectively. However, AAME is lagging, with only 55% recovery, spending R363 million in 2023 compared to R660 million before the pandemic.

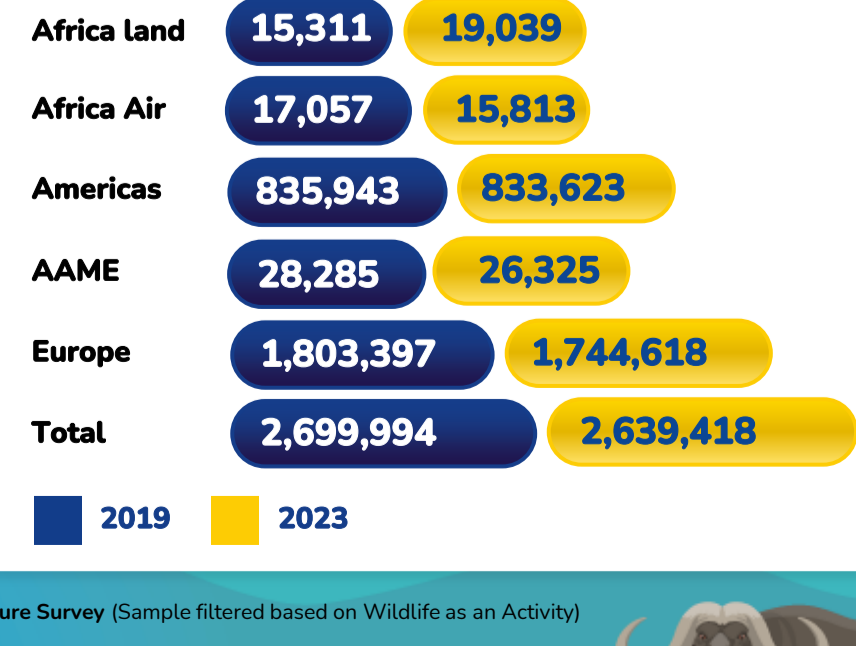
Spend Analysis – Total Spend



WILDLIFE STAY PATTERNS – GAME LODGES

Game lodge usage is predominantly driven by European and American tourists, who account for 98% of nights spent there.

Total bed nights by Accommodation Type – Game Lodges



98% of Game lodge usage is by European and American tourists

Sources: South African Tourism's Departure Survey (Sample filtered based on Wildlife as an Activity)

