

What attracts tourists to the Little Karoo?

Technical Report

November 2006



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ABSTRACT

There has been a very rapid expansion in the number of people involved in the tourism industry over the last 5 years in the Little Karoo. There is consequently an increasing emphasis on the potential of tourism to support sustainable development in the region. There is however very little information on the region's emerging tourism market. Most provincial and national studies tend to group the Little Karoo with the Garden Route which has a very different economic and environmental character. This study used a series of three questionnaires (for tourists, service providers and regulators in the tourism industry) to determine which aspects of the Little Karoo environment were important to tourists visiting this region and whether the service providers and regulators were aware of these preferences. We supplemented the questionnaires with an analysis of 84 brochures to determine how well this awareness was translated into marketing of the region.

It was found that during both the July and January school holidays just over 60% of South African visitors interviewed in the Little Karoo were Afrikaans speaking. The majority of the remainder (at least 35%) were English speaking. Thirty percent were first time visitors and over 80 percent of the visitors during both time periods were South African. Our data did not show a relationship between income and expenditure or with what people enjoy most. The mean median total daily expenditure in January was R190 per day excluding explicit reference to transport while in July the mean expenditure was R550 per day including explicit transport estimate of R300 (median value).

When tourists were asked "What did you enjoy most about the area?" the most frequent response was scenery followed by nature. In terms of scenery preferences, the mountains were significantly more popular than the open plains and the small towns were more popular than the cities. Many people indicated that it was the undeveloped nature of the area which appealed to them. Gravel roads attracted at least as many people as were deterred by them, and were especially popular with those who were staying in remote rural areas. Repeat visitors were particularly attracted to the peace and quiet of the region and frequent visitors, (who visited the region more than 10 times), highlighted the regions genuine and hospitable people.

The local brochures do not feature the climate very prominently, unlike the regional advertising campaigns which promote the area as a sunny area close to the Garden Route. The local approach is supported by our survey which shows a mixed tourist response to local climate.

First time visitors, particularly those without families were attracted to the Cango Caves and had a very positive experience there. The ostriches were also very popular, especially with the younger adults, and they were the features most frequently mentioned in local brochures. In contrast, the regions high number of endemic plants is only mentioned by one brochure. Over 20 percent of tourists surveyed indicated that they were interested in seeing rare plants but are probably unlikely to experience them due to a shortage of access and information.

1. INTRODUCTION

As a consequence of ongoing challenges in the agricultural sector, tourism is increasingly seen as a potential vehicle to promote sustainable development in the region. Over the last decade the tourism industry in the Little Karoo has grown tremendously. For example, ten years ago only two places provided accommodation in Calizdorp whereas by 2006 there were 44 members of the local tourism bureau. This growth has accelerated over the past 5 years and is reflected in both a growing number of tourism establishments and a significant increase in property prices. This is reflected in our surveys of service providers where over 20 percent had been in business for less than a year. Indeed, as we tried to interview the larger and more successful establishments wherever possible this is likely to be an underestimate of the percentage of new role-players. Many of these new role-players were very optimistic about the potential of this market and saw the key growth area as being independent travellers. There appears to have been a greater increase in accommodation availability than in the diversification of activities over the last 5 years. Many service providers are using the additional income as a supplement rather than their primary source of income.

Local government's support of this sector is mixed and some local municipalities do not see this as a priority area for expenditure. There is consequently very little information on the regions emerging tourism market. Most provincial and national studies tend to group the Little Karoo with the Garden Route which has a very different character. Even within the region there is a strong focus on the attractions of Oudtshoorn rather than those found in the adjoining rural areas (Kannaland). The objective of this study was to obtain some baseline data on who was coming to the Little Karoo, to develop an understanding of what attracted them to the region, and what their experience was once they arrived there. We then spoke to service providers and regulators to determine their perceptions of the tourist experience and used an analysis of brochures to examine how this understanding was translated into marketing.

2. APPROACH

2.1 *Local questionnaires*

This study used three different semi-structured questionnaires targeted at tourists (both local and foreign), service providers (owners of facilities and tour guides) and regulators of the tourism industry (both public and private sector). The objective of the research was to understand any differences in perceptions between these different groups. The questionnaires were designed in consultation with other experts, and were tested in the field before being adapted and distributed in the Little Karoo. The field work was initiated through a meeting with key local regulators which secured their by-in and participation in the survey process.

The objective of the tourist questionnaire was to develop an understanding of the profile and preferences of tourists to the region. Initially 600 questionnaires were distributed in November 2005 to Local Tourism Offices and other locations with high densities of tourist traffic for administration by local agents as part of their ongoing interaction with tourists. The response rate was very low (12 returns) and these results were consequently used as a pilot study to inform the questionnaire design and were not used in later analysis. The approach

was then adapted to ensure that tourists were approached for face to face interviews by interviewers who had been hired specifically for this purpose. This dramatically increased returns and a total of 675 tourists were interviewed. Interviews were conducted over three time periods during 2006 all of which co-incided with local school holidays and the peak tourist periods. The majority of the questions were structured with a few open ended questions to keep interviews under 10 minutes. The refusal rate was below 25% (34 in July = 20.98 percent).

Table 1: Description of different survey periods

	January 06	Kunsteffees ¹ April 06	July 06
Number of returns	177	355	128
Location of interviews	At accommodation venues with an emphasis on rural sites which included nature reserves	In the towns of Oudtshoorn and Calizdorp with a focus on the festival venues	In Calitzdorp, Ladismtih and Oudtshoorn accommodation venues and the more popular attractions (Cango Caves, Ostrich Farms, Cango Wildlife Ranch and spas)

Thirty-four service providers were interviewed between November 05 and April 06. The majority of respondents owned accommodation facilities but there were also a number of other businesses such as restaurants and tour guides. Interviews were largely held at the facilities owned by the respondent and took between 30 minutes to an hour and a half.

Two local meetings of tourism regulators were attended in November 05 and October 06 and during these meetings Local Tourism Officers as well as members of the Provincial Tourism Bureau were asked to complete questionnaires. Additional interviews were held with the District Municipality, the private sector led Route 62 and wine marketing initiatives. A total of 10 regulators were interviewed.

2.2 Supplementary Data: provincial and district level surveys

In addition to these interviews which we supervised, we included a number of questions pertinent to nature-based tourism in the provincial tourism study. This study was undertaken over the same time period and undertook face to face surveys of 700 people, 130 of whom were located in the Garden Route and Little Karoo. This provincial data therefore provides a useful context for this detailed local study.

In recognition of the paucity of baseline data in the area there were two other surveys undertaken during the study period. The first was undertaken by the District Municipality and no results have been obtained from this study. The second was undertaken by the Winelands District municipality and focused specifically on the route 62. We were unable to obtain this information despite approaching both the consultant and the client.

¹ A large 10 day Afrikaans language based festival held in the largest town Oudtshoorn during which the vast majority of visitors stay in the town itself.

2.3 Brochure analysis

We analysed 84 brochures gathered at the Oudtshoorn, Calizdorp and Ladismith tourism offices to determine what features were used in advertising and how prominently they featured.

3. RESULTS

3.1 Profile of tourists

Table 2: Profile of tourists

	January 2006	July 2006
Percentage South African	89	84
Percentage Afrikaans	64	63
Percentage Other (African and Hindi)	3	0
Nationality of foreigners (percentages of total visitors sampled)	UK 5% German 4% Asia 3% Other Europe 3% Australasia 1% N America 1%	7% N America 5% rest of Europe* 4% Dutch
Percentage of first time visitors	39.9	30.04

*excludes Dutch, UK and Germany

3.2 Best experience: What did visitors enjoy the most?

During both the December and July surveys tourists were asked the following unstructured question at the beginning of the interview: "What did you enjoy most about the area?" During both time periods scenery followed by nature were the most popular choices. This appears to indicate that these features are consistently appreciated by the tourists coming to this area. During the January survey the respondents who chose scenery were significantly younger than average (Mann-Whitney U, $p=0.03$), but there was no significant difference between South Africans and foreign visitors response to this question. (There was also no difference between English and Afrikaans South Africans; first time and repeat visitors; or between different income brackets). This feature thus seems to be important to a wide cross spectrum of visitors.

Nature, the second ranking feature, was chosen by significantly more Afrikaans respondents than English speaking South Africans. Peace and the people of the area were also amongst the top 5 features during both time periods. During January, when more people were interviewed in nature reserves and rural areas, the undeveloped wilderness nature of the area was also included the top 5 features. In July, when more visitors were interviewed in the tourist attractions of Oudtshoorn itself, the Congo Caves was included in the top 5 features.

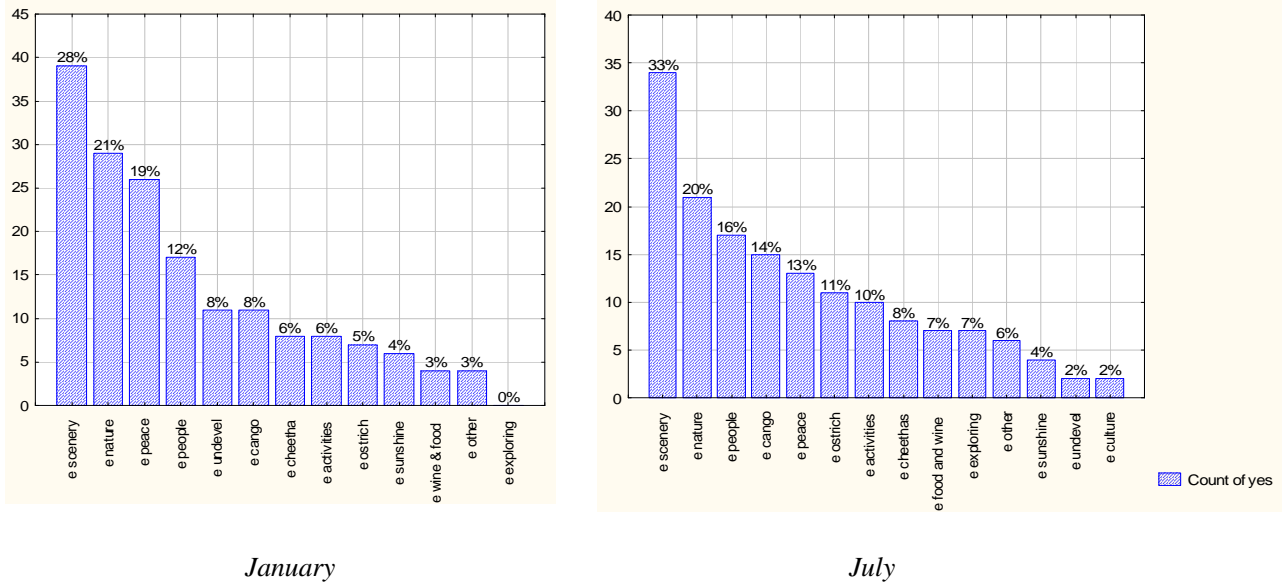


Figure 3.1 What did tourists surveyed in January and July 2006 enjoy most about the area?

3.3 Relative importance and experience of various features of the Little Karoo

Tourists were asked to “How important is it for you to experience the following in your holiday” and were then provided with a range of features found in the Little Karoo. They were first asked to weight the importance each feature using a 5 point Likert Scale of 1= very unimportant to 5 very important. They were then asked to evaluate their experience in the Little Karoo also using a 5 point scale (1= very poor, 2 = poor, 3 = neutral, 4 = good, 5 = very good), provision was also made to indicate if this was not applicable.

3.3.1 Features which are important to tourists

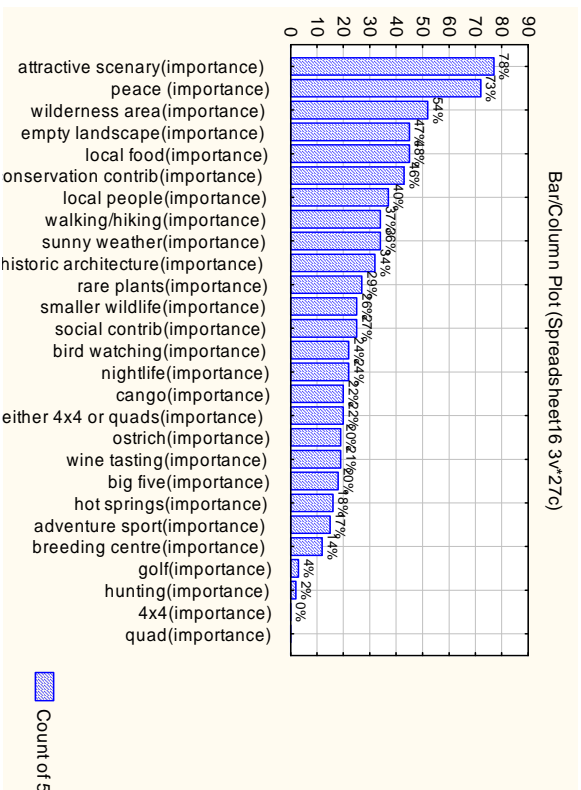


Figure 3.2 What was important to tourists surveyed in January 2006? (Percentage of tourists who ranked features as very important vs. name of feature)

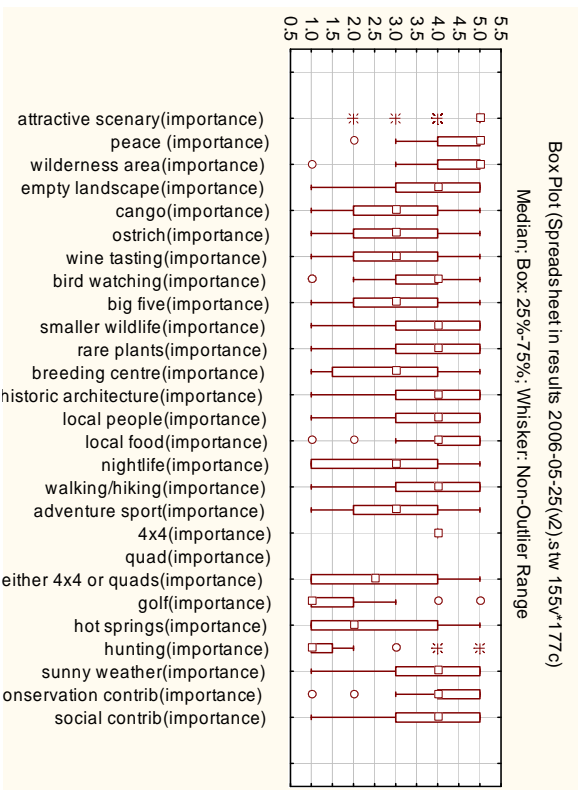


Figure 3.3 Box and whisker plot showing the variability of the importance of features to tourists surveyed in January 2006.

Outliers: For Graphs menu graphs box plots, a data point is deemed to be an outlier if the following conditions hold:
 data point value > UBV + o.c.*(UBV - LBV)
 or
 data point value < LBV - o.c.*(UBV - LBV)

where

UBV is the upper value of the box in the box plot (e.g., the mean + standard error or the 75th percentile).

LBV is the lower value of the box in the box plot (e.g., the mean - standard error or the 25th percentile).

o.c. is the outlier coefficient specified in the Outliers group of the box plot dialog (by default, the outlier coefficient is 1.5).

Extremes. For Graphs menu graphs box plots, a data point is deemed to be an extreme value if the following conditions hold:

data point value $> UBV + 2 * o.c. * (UBV - LBV)$

or

data point value $< LBV - 2 * o.c. * (UBV - LBV)$

where

UBV is the upper value of the box in the box plot (e.g., the mean + standard error or the 75th percentile).

LBV is the lower value of the box in the box plot (e.g., the mean - standard error or the 25th percentile).

o.c. is the outlier coefficient specified in the Outliers group of the box plot dialog (by default, the outlier coefficient is 1.5, thus, the extreme values are those which are outside the 3 box length range from the upper and lower value of the box).

The January 2006 tourists have clearly identified the attractive scenery and peace and quiet as being very important for their holiday (ranked respectively as important by 78% and 73% of respondents). The next most important characteristic is the wilderness/undeveloped nature of the area 54% and the 47% empty landscape. In addition scenery, peace and wilderness area have a median value of 5 (very important). Those that have a median value of 4 (important) are: empty landscape; bird watching; rare plants; historic architecture; local people; local food; walking; 4x4; sunny weather and making a contribution to social upliftment and conservation.

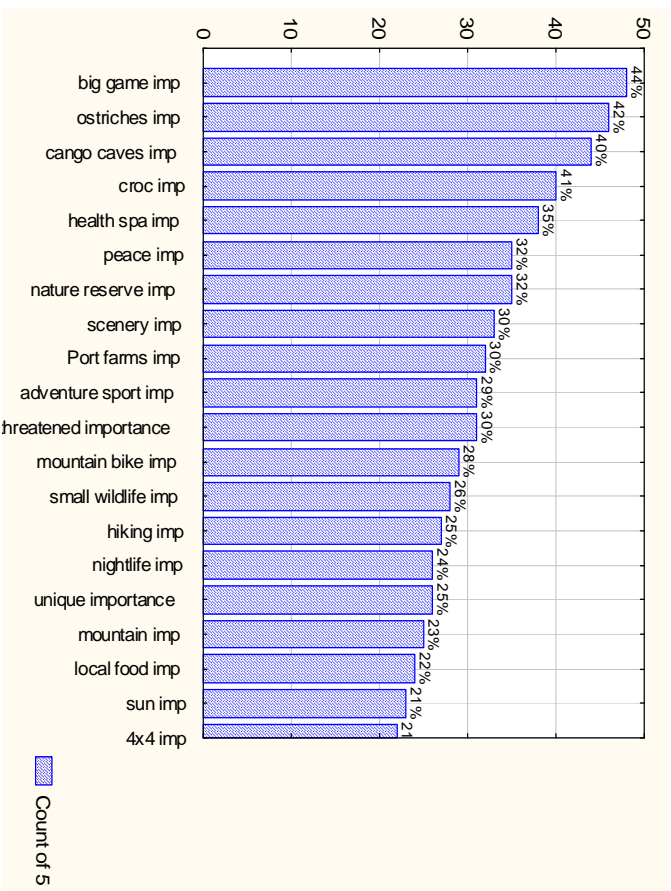


Figure 3.4 What is important to tourists surveyed in July 2006?
(Percentage of tourists who ranked features as very important vs. name of feature)

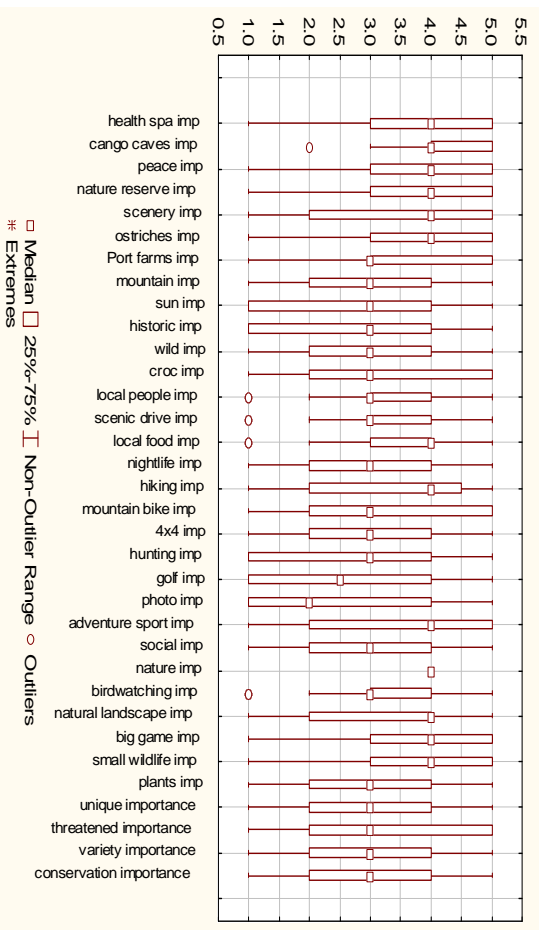
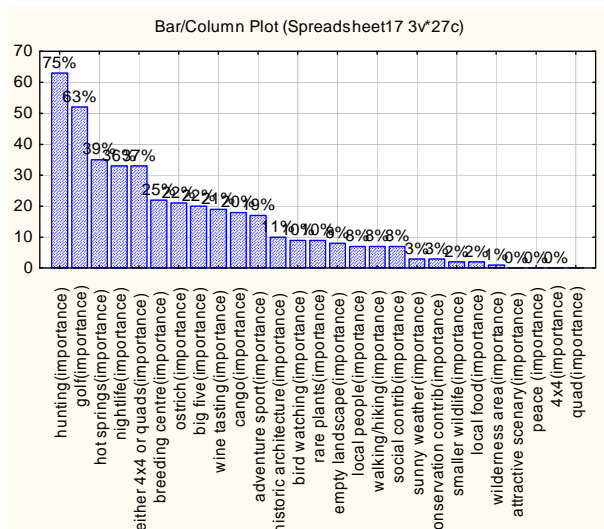


Figure 3.5 Box and whisker plot showing variability of the importance of features to tourists surveyed in July 2006.

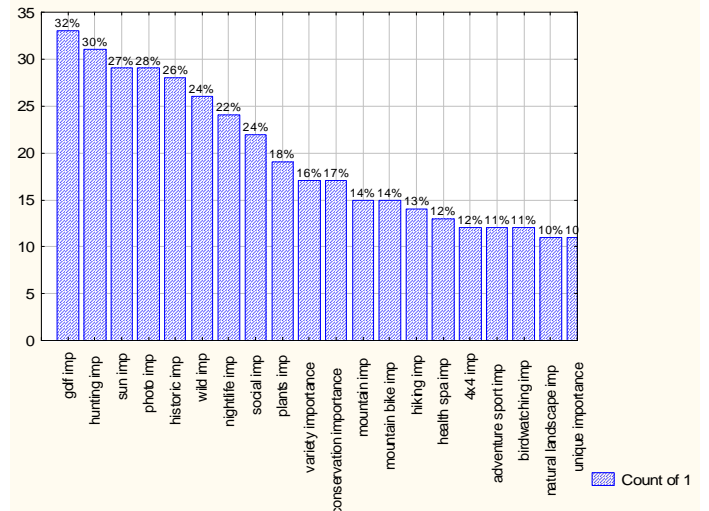
During this time period no features had a median value of very important. For the July tourists who were sampled at the Cango Caves, Ostrich Farms, Crocodile Ranch and Health Spa these features were weighted as important together with seeing big game. This was followed by peace, nature reserves and scenery and wine farms which also had a median weight of important. Interestingly, seeing threatened species, small wildlife and unique plants and animals scored higher than the sunshine and local food.

The only features which had a negative (unimportant) median were photography and golf. In July sunshine, which is frequently used in marketing the region was the scored third “least most popular feature” category, after golf and hunting.

3.3.2 Features which are unimportant to tourists



January



July

Figure 3.6 Figure showing features which have the highest scores for un-important for tourists surveyed in January and July 2006.

In January, hunting and golf received at least one third more votes of “very unimportant” than any other feature. It is also interesting that over 20 percent of visitors are not interested in the Cango Caves or Ostriches, whereas only 10 percent are not interested in the more nature based features such as bird watching and rare plants. These people, who were largely interviewed in rural areas, were also not interested in nightlife. A significant percentage were also not supportive of 4x4 and quad bikes. Discussions with tourists revealed a significant difference in response to these two features. The quads were removed in the July sample and this was associated with a decrease in the percentage of people who were very negative (One cannot prove this is a cause and effect relationship but it is likely in view of the qualitative information obtained during surveys of both tourists and service providers).

Golf and hunting were the least important features in both the July and December surveys. In the winter, July holidays, there were also a significant number of people who did not view the sunshine as important. The percentage of people who were uninterested in bird watching remained constant at around 10 percent but there were more people who were not interested in a wilderness experience or plants in July. Historic features were also unimportant to a high number of tourists interviewed in July.

3.4 Different aspects of biodiversity

For both time periods the biodiversity features were analysed in more detail. Figure 3.7 shows all positive weightings (i.e. both very important and important whereas Figure 3.2 and 3.4 show only those weighting the features as very important.). Tourist indicated in interviews that although they were interested in the big 5 they were not experiencing them in the Little Karoo. In July the sequence of weighting remains fairly constant whether scores of 5 are used or both 4 and 5. In July the sequences changed slightly if scores of only 5 (very important) were used as opposed to both (very important5 and important 4) were used but as the differences between categories is small it is not clear without further analysis whether this is significant. Big game and smaller wildlife remain higher than plants. Other measures of biodiversity namely unique, threatened and a variety of species are also given less positive weightings.

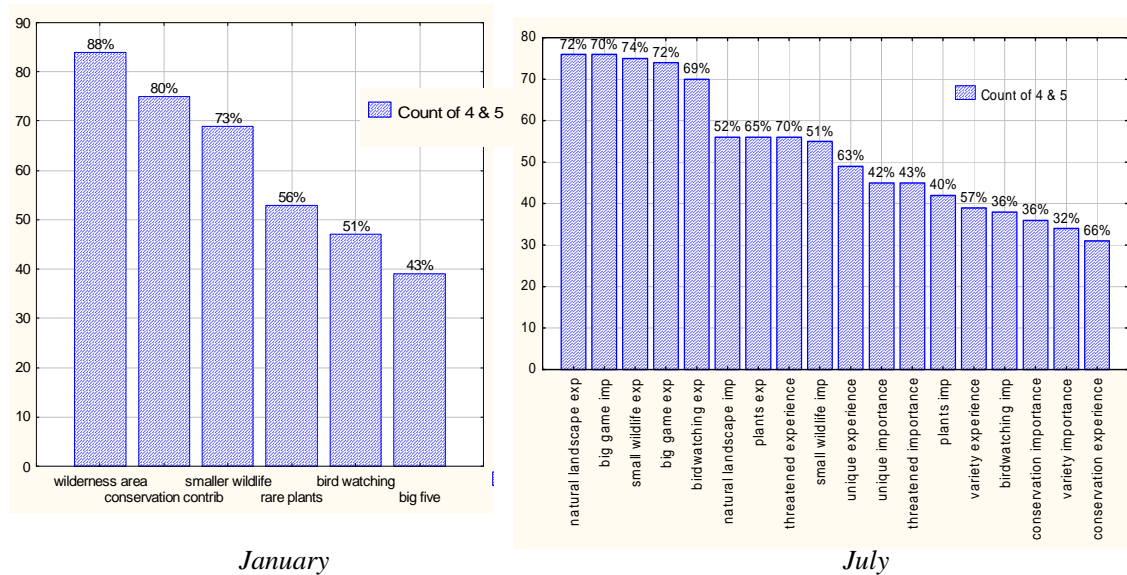


Figure 3.7 Graph of showing frequency of positive ranking of natural categories for tourists surveyed in January and July 2006.

3.5 Type of environment

3.5.1 Preferred scenery

In terms of scenery 78% the January 2006 tourists preferred mountains and 45% open plains small towns and agriculture scored significantly less at under 10%.

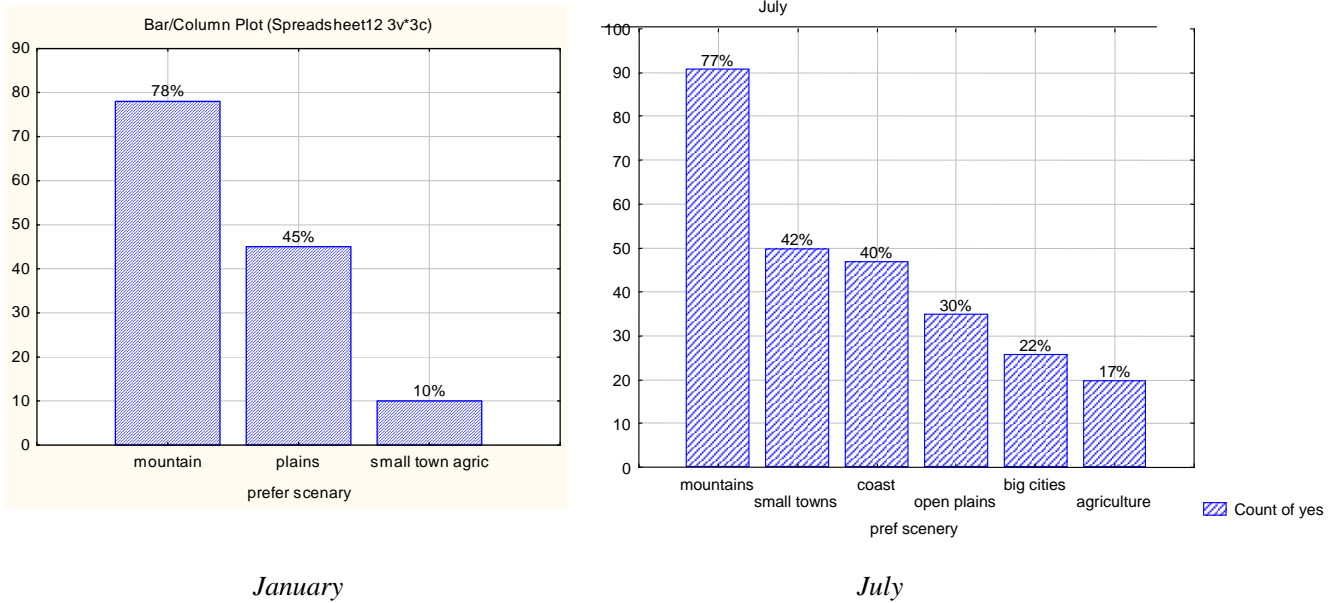


Figure 3.8. Preferred scenery in January and July surveys

For both time periods the mountains were significantly more popular than open plains ($p < 0.01$) and likewise in July big cities were significantly less popular than small towns ($p < 0.01$). The provincial survey showed the same pattern with agriculture consistently being the least most popular choice.

The provincial survey used the same scenery alternatives as the July sample in the Little Karoo with remarkably similar results. In the provincial survey the coast scored highest. This was followed by mountains, small towns, big towns, open plains and agriculture was again ranked lowest.

3.5.2 Gravel Roads

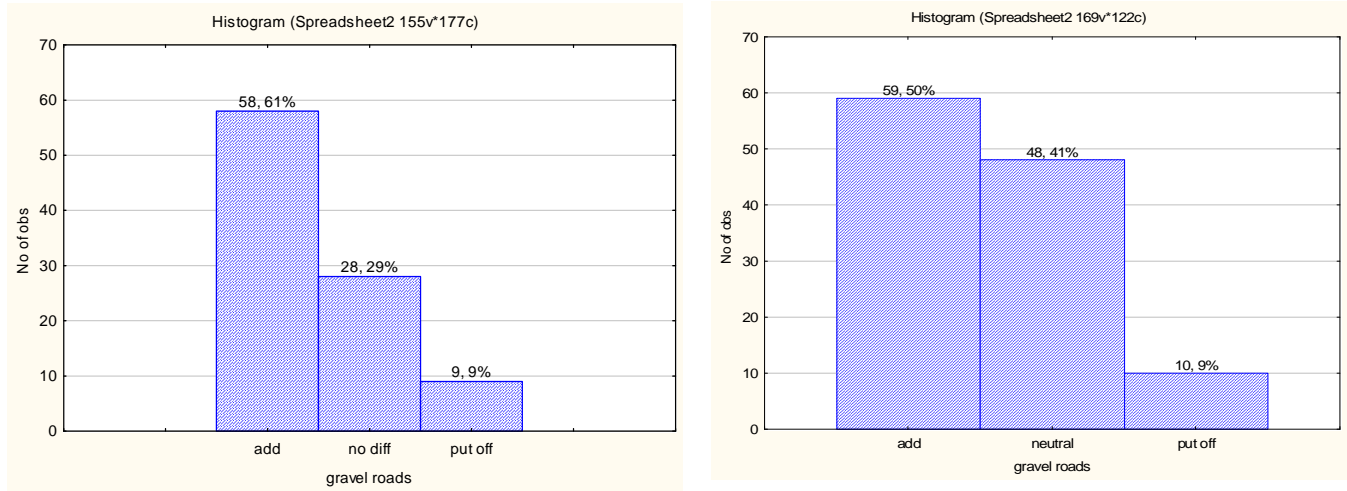


Figure 3.9. Reaction to gravel roads from tourists surveyed during January and July 2006.

From our discussion with service providers we expected gravel roads to put off a significant proportion of visitors and that this would be a particularly serious problem for overseas visitors. The results of our interviews with tourists indicated that 90 percent of respondents felt that they added to the experience or did not mind them. This pattern held for both South Africans and foreigners (over 73 of the latter felt they added to the experience). What is more of a problem for many people is the fact that the hired car companies often will not insure cars travelling on gravel roads.

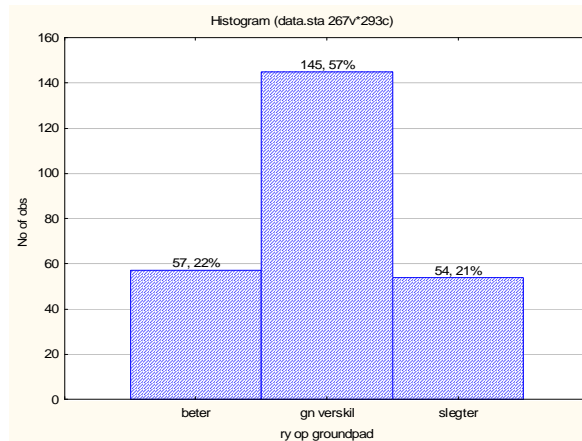


Figure 3.10. Reaction to gravel roads from tourists surveyed during the Kunstfees 2006.

When we surveyed the people attending the Kunstefees there were significantly less positive about the gravel roads than people sampled during the other holiday periods. Only 21% however said that this made the experience worse.

We then thought people might be positive about gravel roads if they were short but we found during the January 2006 period nearly 50% of people sampled were prepared to travel over 100km on dust roads to get to an interesting destination. This also held true over the Kunstefees where although people were generally less positive about gravel roads most were prepared to travel under 100km to get to an interesting destination.

Table 3. Summary of responses to gravel roads

Outside Kunstefees:	During Kunstefees
over 50% + positive < 10% dislike gravel	over 50% neutral positive & negative 20%
40% of service providers viewed gravel as positive 21% of service providers viewed gravel as negative	

3.6 Differences between different types of visitors

Table 4. Differences between different types of visitors

Feature	Type of tourist		Significance (p value unless otherwise indicated)	Time period
	South African	Foreign		
Quads Importance	More	Less	0.04	January
Social contribution experience	Less	More	0.06	January
Walking importance	Less	More	0.05	January
	Rural	Neutral		
Gravel adds	More	Less	0.03	January
Peace importance	More	Less	0.01	January
Cango experience	Less	More	0.01	January
Ostriches experience	Less	More	0.01	January
Big five experience	Less	More	0.01	January
Wildlife Breeding Centre experience	Less	More	0.01	January
Golf experience	Less	More	0.01 ²	January
Hot springs experience	Less	More	0.01	January
	Afrikaans	English		
Travel further gravel roads	More	Less	0.01	January
Peace	More	Less	0.01	January
Empty landscape importance	More	Less	0.01	January
Smaller wildlife importance	More	Less	(p=0.08 Man-U 0.02)	January

² Small sample size

Birdwatching importance	More	Less	0.05 (Man U= 0.03)	January
Rare plants importance	More	Less	0.01	January
Enjoy nature most	More	Less	<0.01	July
Enjoy peace most	More	Less	0.05065	July
	Younger	Older		
Enjoy ostriches most	More	Less	0.03	January
Enjoy activities most	Less	More	p<0.01	January
	Families	No children		
Enjoy Cango Caves most	Less	More	0.00061	January
	Frequent visitors (>10)	Less frequent visitors		
Enjoy peace most	More	Less	(Chi p=0.026)	January
Enjoy people most	More	Less	0.035	January
Enjoy ostriches most	Less	More	0.025	January
Enjoy Cango Caves most	Less	More	0.0032	January

It is interesting to note that the difference in experience occurred mostly in terms of locations which tourists may have either visited or not experienced at all. The differences in the nature categories on the other hand were predominantly in terms of relative importance to different types of visitors.

3.7 Brochures

The analysis of the advertising brochures revealed that the most frequently mentioned feature was ostriches followed by mountains and scenery in general. The Cango Caves were the next most frequently mentioned feature followed by hiking and Route 62. This is a good reflection of features indicated as important by tourists but the importance of the peace of the area is perhaps underappreciated.

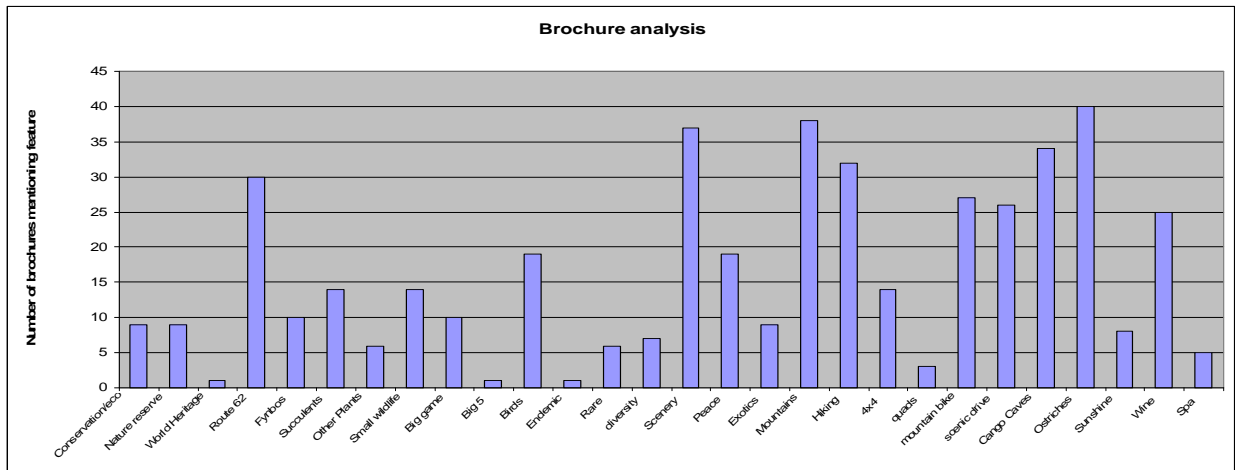


Figure 3.11. Analysis showing the number of brochures which mention selected features of the Little Karoo.

3.8 Economic implications of tourism

In July tourists were asked how much they spent daily on accommodation and how much they spent on other expenses like food and curios. Transport was not specified as a separate category and therefore is likely to have been under-estimated.

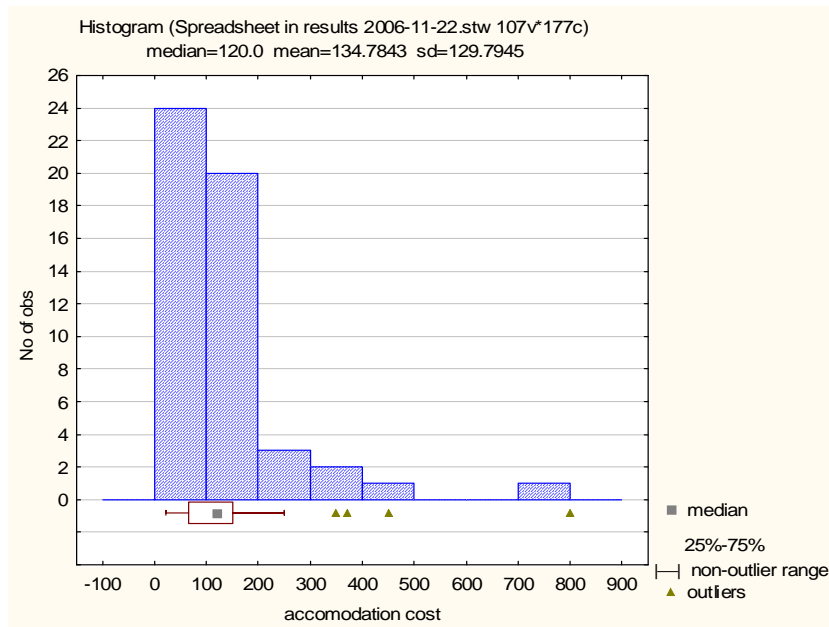
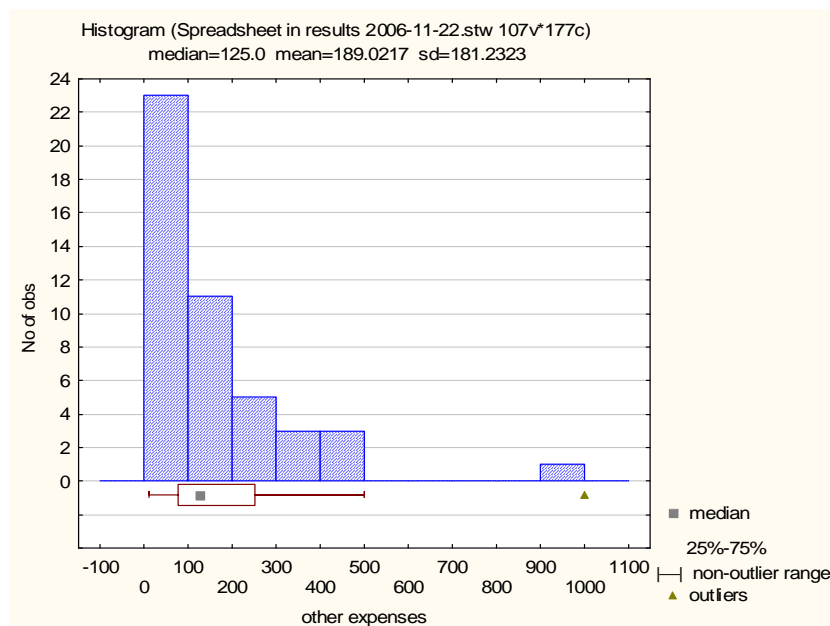


Figure 3.12 Daily expenditure on accommodation of tourists surveyed in January 2006



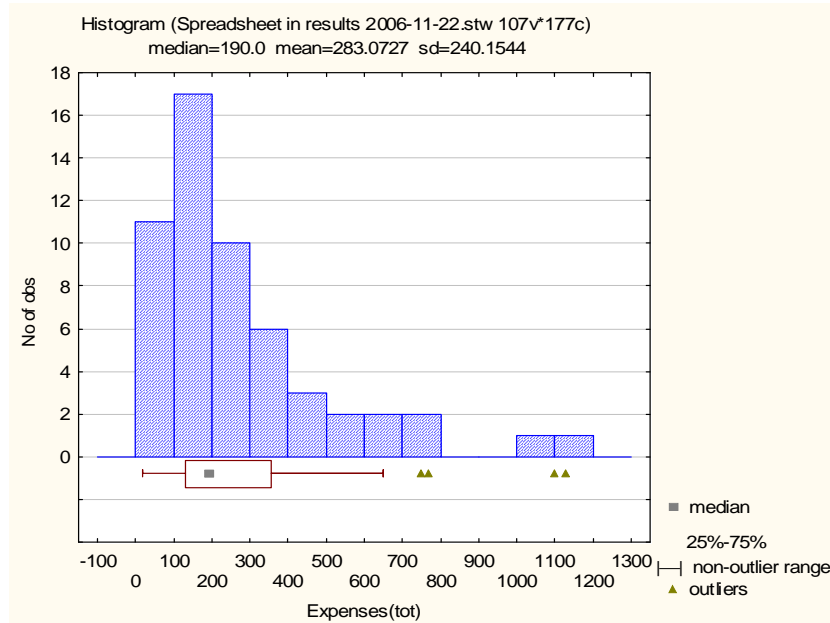


Figure 3.13 Daily expenditure on other expenses (food, curios etc) of tourists surveyed in January 2006

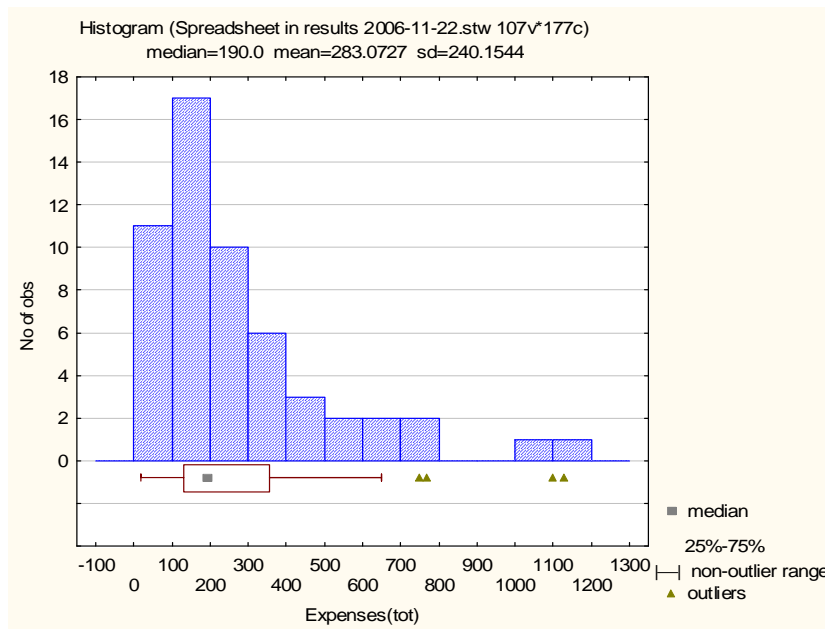


Figure 3.14 Total daily expenditure of tourists surveyed in January 2006

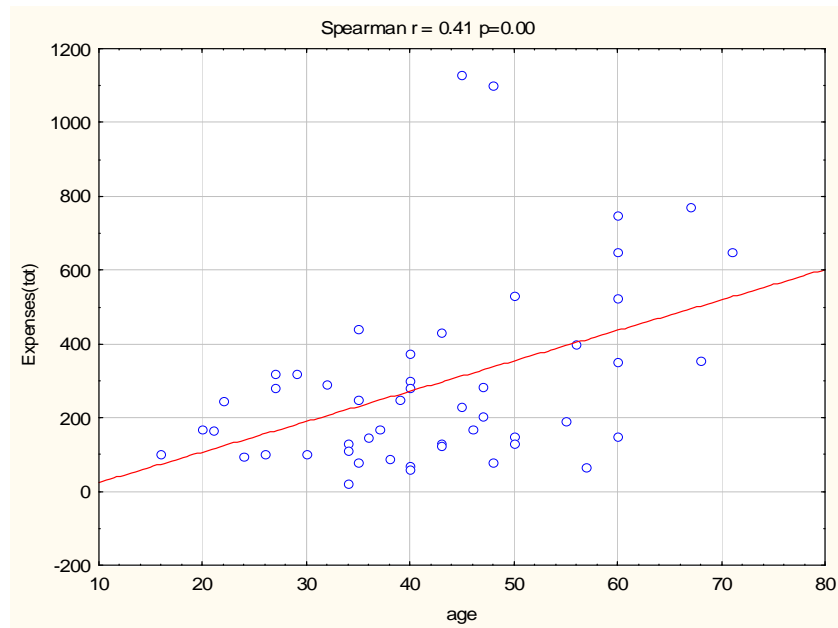


Figure 3.15. Daily expenditure vs. age for tourists surveyed in January 2006 shows a positive correlation.

In July tourists were asked their expenditure on three different categories of potential expenses: accommodation; transport; and food and curios. They were also asked to indicate their income bracket. There was no relationship between income bracket and expenditure.

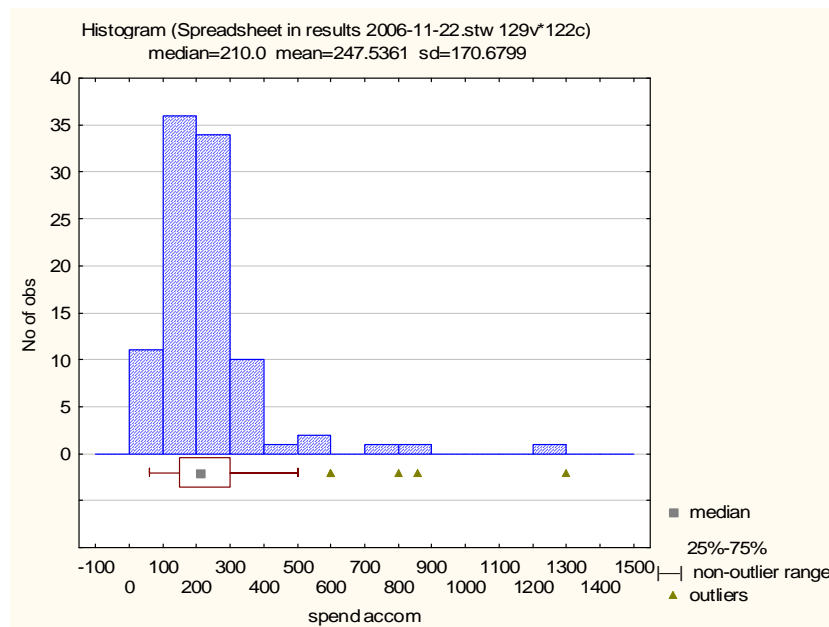


Figure 3.16 Daily expenditure on accommodation of tourists surveyed in July

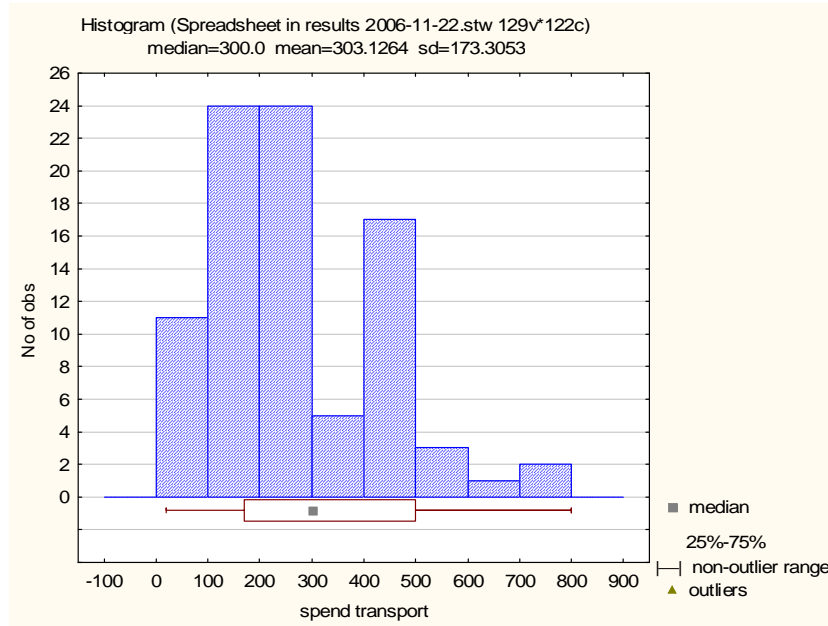


Figure 3.17 Daily expenditure on transport of tourists surveyed in July 2006

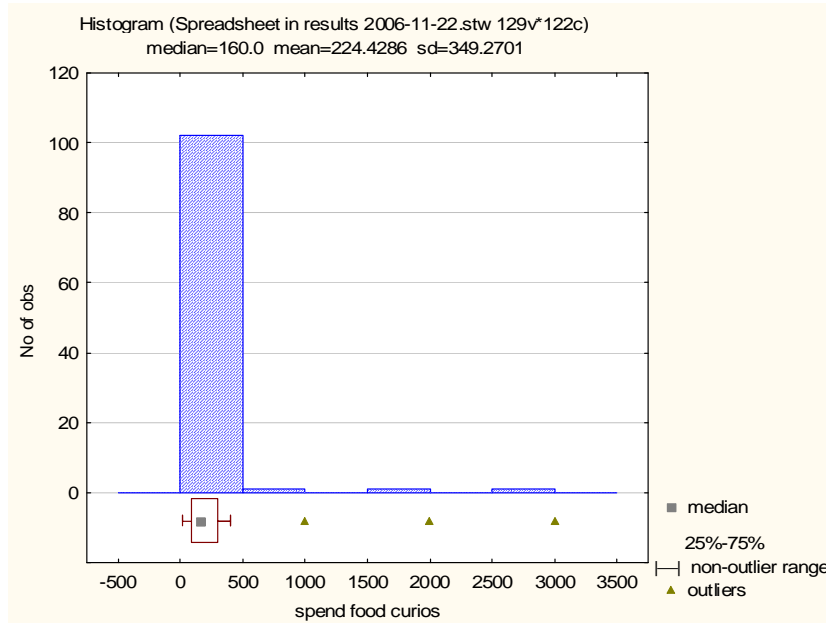


Figure 3.18 Expenditure on food, curios of tourists surveyed in July 2006

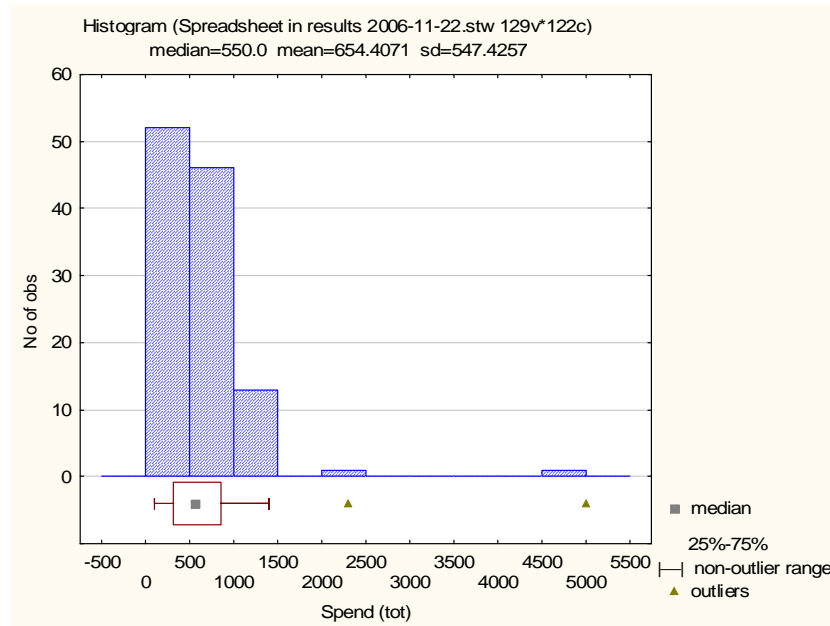


Figure 3.19 Total daily expenditure of tourists surveyed in July

For the July tourists there were no significant differences between South Africans and foreigners, language groups or age, or between first time and repeat visitors. The only group spending significantly more ($p=0.04$) were those with children who spent on average R800 per person per day as opposed to those without children who spent under R600 per person per day.

4. DISCUSSION

Thirty percent of the sample were first time visitors, many of whom indicated that the Cango Caves were the most enjoyable part of their visit, particularly if they did not have children. For those with children the ostriches and the less well known Cango Wildlife ranch were often viewed as the highlight of their visit to the region. In terms of marketing, the most frequently mentioned feature was the ostriches. Ostriches together with the Cango Caves are also the focus of regional marketing campaigns.

The local brochures highlight the scenery and mountains ahead of the Cango Caves which is probably a better reflection of tourist experience as measured in this survey. In both the January and July surveys: the most frequent responses to the open ended question "What do you enjoy most about the area?" was scenery, followed by nature. We investigated which aspects of scenery were most attractive: seventy-five percent of respondents indicated that their preferred scenery was mountains; agriculture was consistently chosen as the least popular option; and big cities were significantly less popular than small towns ($p<0.01$). The natural scenery of the area was therefore the key attraction. Peace and quiet and the genuine hospitality of the local people were the next most frequently selected features. The peace and quiet was significantly more important ($p=0.026$) for repeat visitors in the January survey period, this trend was repeated in the July survey period but was not statistically significant. In the July time period we specifically identified the people who

visited more than 10 times, these frequent visitors were most likely to highlight local people as the most attractive feature of the area. These frequent visitors were also significantly less interested in the cango caves and the ostriches.

There was considerable debate as to whether gravel roads were an asset or a liability; 40 percent of service providers viewed gravel as being part of the attraction of the area and 21 percent felt that it deterred visitors. Over 50% of visitors viewed gravel as being positive with only 10 percent of visitors in January and July indicating that gravel would put them off. Those who were interviewed in rural areas were significantly more likely to be positive about gravel ($p=0.027$). During the Kunstefees more people preferred city accommodation and a higher percentage (20%) indicated that they would be deterred by gravel but at no time period did the number deterred by gravel outnumber those who were attracted by it. Many people indicated that it was the undeveloped nature of the area which was part of its attraction.

As nature appears to be a key feature for visitors, we investigated which aspects of the natural environment were most important for tourists. In January the feature which was most frequently selected as important was the wilderness character/lack of development; and 80 percent of respondents were positive about making a contribution to conservation. Interestingly, the smaller wildlife and plants and bird watching were more popular than the big five. In the brochures birds were the most frequently mentioned natural feature and they were very important to several tourists interviewed. In July the big five and smaller wildlife were the most popular components of biodiversity and the least popular were plants, unique species, threatened species and seeing a variety of species.

It is not well known that the Little Karoo forms part of the Succulent Karoo which is the most diverse arid area in the world and that there are many plants only found in this region. Although 17 percent of brochures mentioned the succulent vegetation of the region, less than half of this number indicated that there are a high number of species or that some species are rare. Only one brochure mentioned the international recognition given to the Swartberg as a World Heritage Site. The fact that there are unusual plants restricted to this area was also only mentioned in one local brochure. Even the nature reserves do not mention how diverse, rare and unique their plants are. This surely implies that these unique natural features are not viewed as a potential tourist attraction. Our experience is that there is consequently very poor knowledge of the presence of rare or unique plants in the area. Tourists are therefore very unlikely to experience them and they remain hidden jewels in a beautiful landscape. Despite this lack of advertising, over 20 percent of tourists indicate that rare plants are an important component of their holiday experience. The challenge for the future lies therefore in creating opportunities for them to experience the rich diversity of plants which are found only in the Little Karoo.

The local brochures do not highlight sunshine as a key feature and again they seem to be better in touch with tourist responses than the regional marketing campaigns. Sunshine is chosen by 4% of visitors as "What they enjoyed most about the region"; but most visitors were neutral about its importance. In the December summer holidays weather was ranked as a very positive experience for the majority of visitors; in the July winter holidays visitors were a bit less enthusiastic; and during the Kunstefees, which is held in autumn, many were negative as it was both very cold and very hot. Indeed, some Kunstefees visitors even said it was the reason they would not return. The local brochures seem to respond to this variance in that fewer than 10 percent mention the climate as an attraction. Thus although the area may provide a sunny escape for those trapped in coastal rain

along the Garden Route, the response of visitors to their experience of the climate of the area is mixed.

Visitors' experience of the regions natural beauty on the other hand is consistently positive and it is this scenery together with the regions peace and quiet and genuine hospitality which attracts repeat visitors.

In conclusion those who travel through quickly through the Little Karoo enjoy the "Oudtshoorn highlights" including the ostriches and caves but those visitors who take the time to go slowly and look carefully are rewarded with discoveries of hidden gems of rare plants and real people.

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