



Cape Overberg Regional Trends

WESGRO
cape town & western cape
research

January – June 2021

An inspiring place to know

Contents

1. Methodology
2. Participation and sample size
3. Executive Summary
4. Cape Overberg Visitor Trends & Patterns
 - 4.1. Origin of visitors
 - 4.2. Age profile of visitors
 - 4.3. Travel group size
 - 4.4. Mode of transport
 - 4.5. Main purpose of visit
 - 4.6. Top activities undertaken in the Cape Overberg
 - 4.7. Top Information Sources
 - 4.8. Overnight Stay
 - 4.9. Average Length of stay
 - 4.10. Average Spend on Accommodation
 - 4.11. Average daily spend in the Cape Overberg
5. Performance of the Cape Overberg Attractions
6. Cape Overberg Towns
7. Acknowledgements

1. Methodology

This report provides an overview of the tourism trends and patterns in the Cape Overberg. The findings will illustrate key visitor trends obtained from the regional visitor tracking survey.

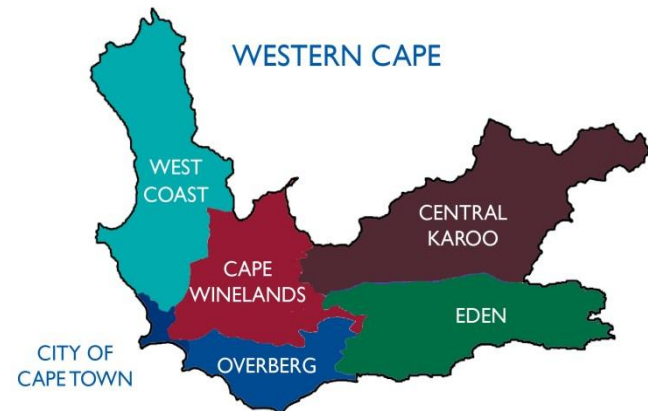
Responses to the regional visitor tracking surveys are used as a proxy to indicate the key trends within the Western Cape and the various regions. It is important to note that absolute figures cannot be determined from these surveys, as the survey responses are a sample of the tourists into the respective 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

Between January and June 2021, a total of **1 303** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Cape Overberg. The participating Tourism Offices were:

Gansbaai	65
Hermanus	223
Hangklip Kleinmond	532
Stanford	483



3. Executive Summary

- Travel restrictions brought on by the COVID-19 pandemic continues to impact the recovery of the tourism sector in 2021. International borders re-opened in October 2020 and recovery has remained slow. The domestic market has recovered more quickly as expected. Though there was a decrease in movement with the rise of infections during the second and third wave.
- As a result, visitors to the participating Cape Overberg attractions reached a combined total of 46 864 visitors between January and June 2021, with a 41% recovery rate compared to the same period in 2019.
- Tourism offices based within the Cape Overberg welcomed a share of 97,8% domestic travellers and 2,2% of visitors were from the overseas markets.
- United Kingdom (20,7%), Germany (17,2%), and China (24,1%) ranked as the region's top three international markets.
- The domestic market was led by travellers from the Western Cape (87,7%) which indicates to the popularity of the destination for short breaks among locals.
- Holiday/leisure ranked as the strongest driver for travel to the region, with 64,9% of visitors mainly travelling for leisure. Visiting friends/relatives (VFR) (15,5%) followed as the second largest share of travellers to the region.
- Around half of respondents indicated overnight stays and the most common age profile of visitors to the Cape Overberg were between 36-50 (42,8%) and 21-35 (25,7%) years.
- Visitors to the region mainly travelled in pairs (39,2%) and on their own (44,6%).
- Visitors spent on average R501-R1000 (32,2%) per day in the region.
- The top three activities enjoyed in the first half of 2021 included outdoor activities, cuisine and scenic drives.

Cape Overberg Visitor Trends

Jan - Jun 2021

Wesgro

cape town & western cape
tourism, trade & investment



Main purpose of visit



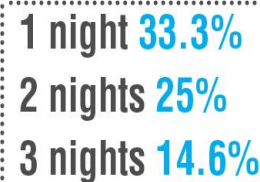
Travel group size

Pairs	39.2%
Alone	44.6%

Age group

36-50	(42.8%)
51-70	(25.7%)

Length of stay



Transport

Rented car	13.6%
Own vehicle	72.7%

Top information sources

Visitor Information Centres	45.8%
Word of mouth	24.5%

Average daily spend

R501 – R1000 (32.2%)



Top 3 activities in the Cape Overberg

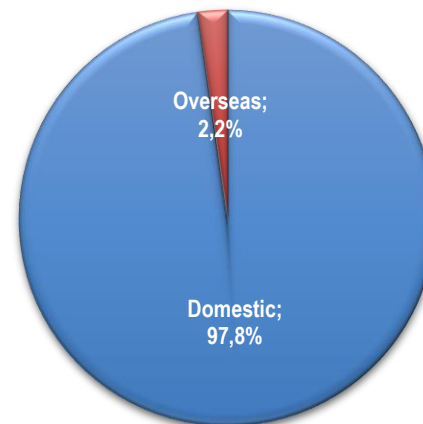
Scenic Drives	(28.8%)
Outdoor Activities	(42.4%)
Cuisine	(31.7%)

4. Cape Overberg Visitor Trends & Patterns

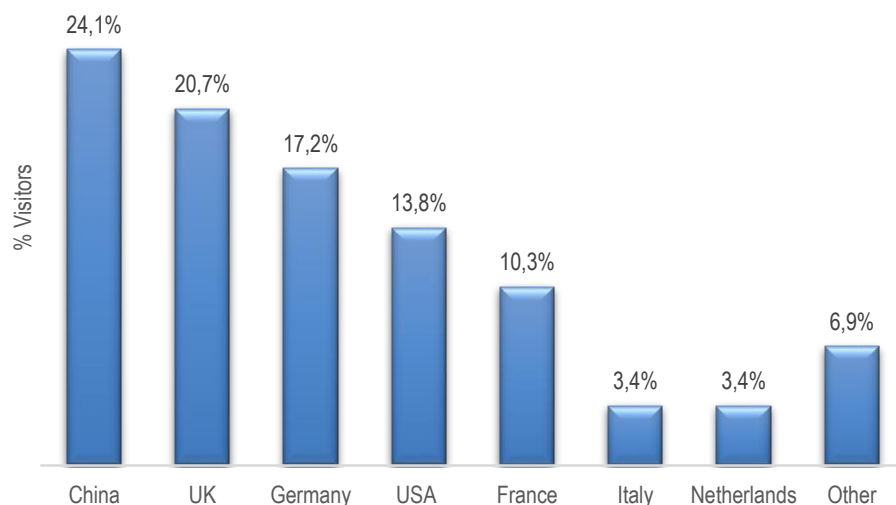
4.1 Origin of Visitors

- Domestic visitors made up 97,8% of travellers to the Cape Overberg in 2021, likely due to international travel restrictions brought on by the COVID-19 pandemic.
- China ranked as the region's top international market followed by traditional markets such as the United Kingdom, Germany, and USA.
- Over the period January to June 2021, the largest share of domestic travellers to the region originated from the Western Cape, which indicates that the Cape Overberg is a popular destination for locals in the province. Gauteng and Eastern Cape were the other most popular source provinces for visitors in the province.

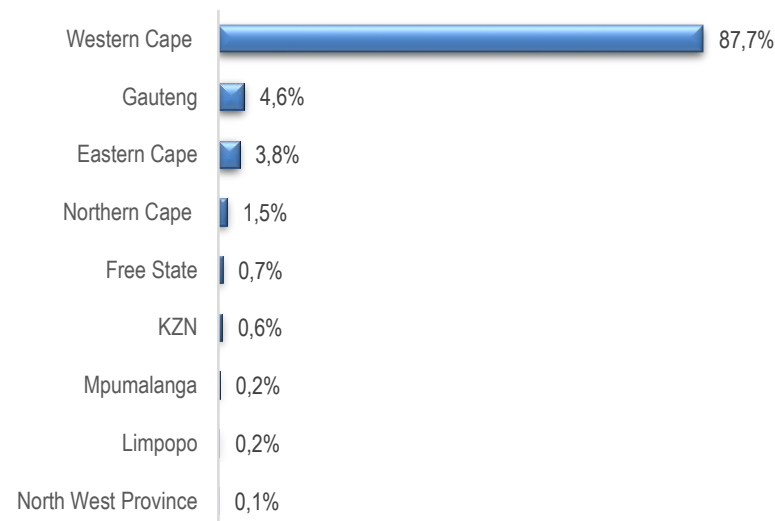
% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO THE CAPE OVERBERG, JAN – JUN 2021



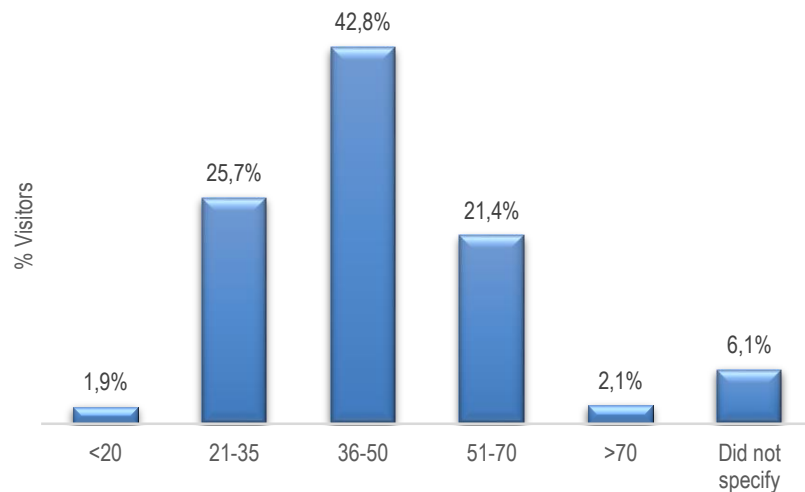
TOP INTERNATIONAL VISITORS TO THE CAPE OVERBERG, JAN – JUN 2021



% SHARE OF DOMESTIC VISITORS TO THE CAPE OVERBERG, JAN – JUN 2021

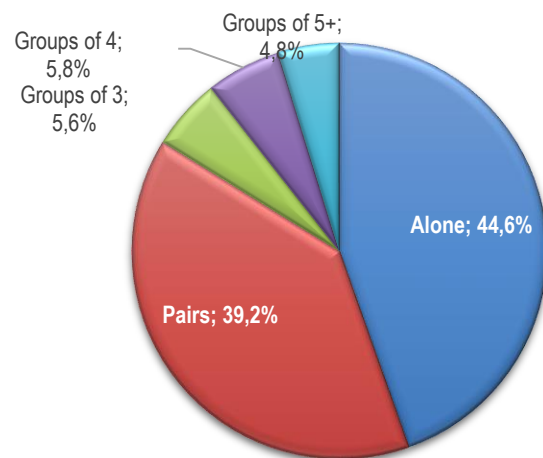


4.2 Age profile of visitors

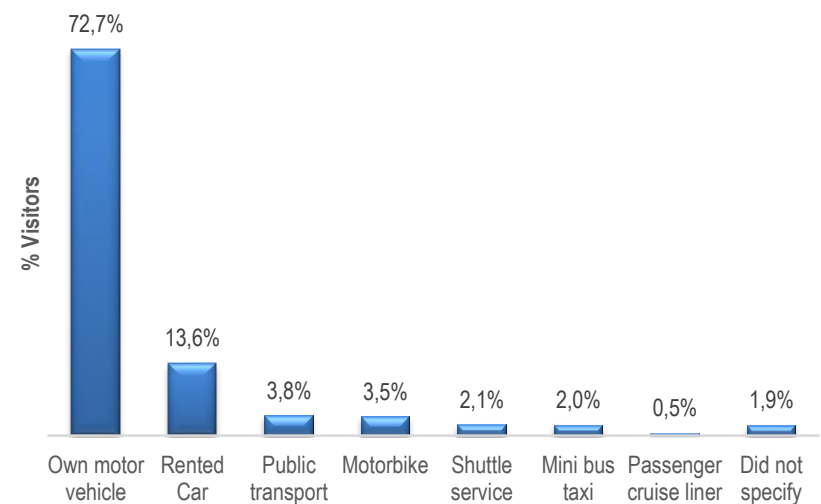


- The Overberg is a region that stretches along coasts with beautiful beaches, and over mountain ranges with interesting geological formations, abundant birdlife and fynbos, making it an all-round destination for all ages.
- From January to June 2021, the leading age group was between 36 and 50 years (42,8%). A further 25,7% of respondents were between the ages of 21 and 35 years and 21,4% were between the ages of 51 and 70 years.
- More than two fifths of respondents travelled alone (44,6%) and a further 39,2% travelled in pairs.
- The vast majority of respondents travelled to the region with their own vehicle (72,7%) or via rented car (13,6%).

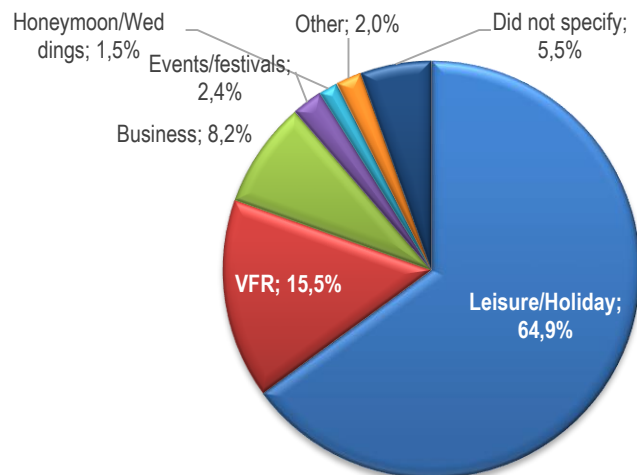
4.3 Group size



4.4 Mode of transport



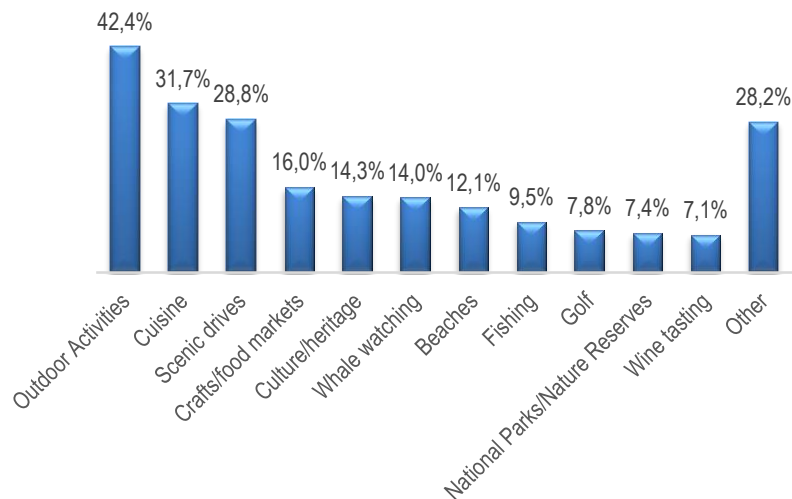
4.5 Purpose of visit



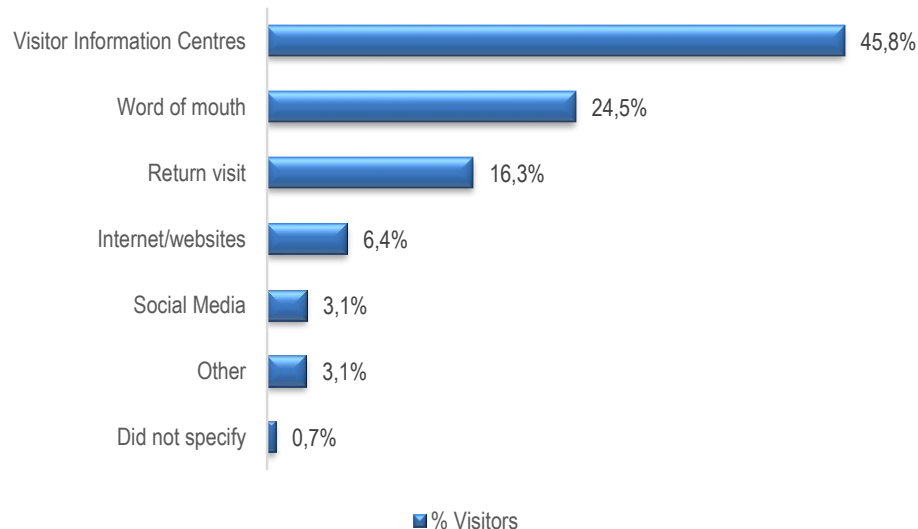
*Other: Includes travel for education, religion, health & wellness, seasonal/migrant work, and sport.

- The most prominent motivating factor for travel to the Cape Overberg was for the purpose of holiday/leisure (64,9%).
- Visiting Friends and Family (VFR) (15,5%) and Business (8,2%) ranked as part of the top three reasons for visiting the Cape Overberg region.
- Outdoor activities (42,4%), cuisine (31,7%) and scenic drives (28,8%) were the top three activities undertaken in the region.
- Activities under the 'other' category included adventure, business, birding, health & wellness, shopping, flowers, cruises, sporting events, shark cage diving, events, cycling, expos/exhibitions, game reserves, and gambling. .
- Visitor Information Centres (45,8%), word of mouth (24,5%), and return visit (16,3%) were the top 3 sources used by visitors to gather information about the region.

4.6 Top Activities Undertaken in the Cape Overberg



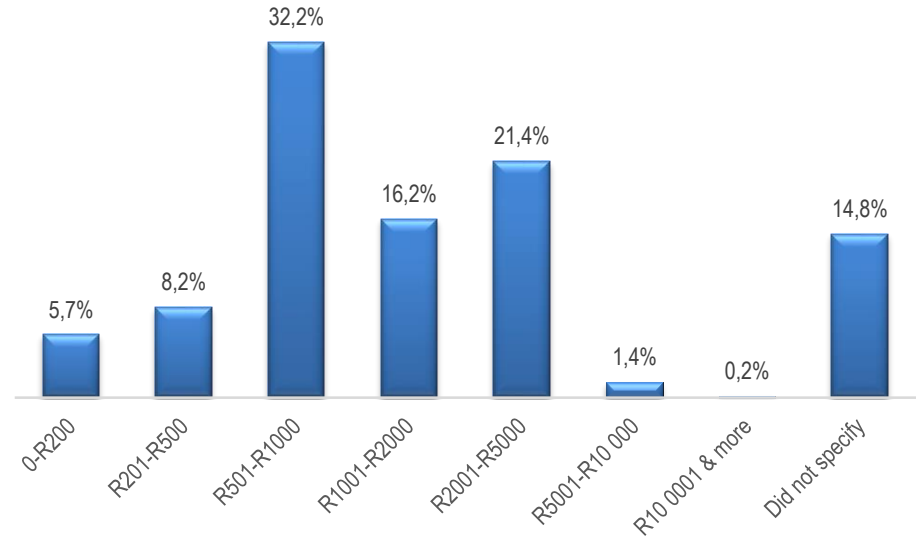
4.7 Top information sources



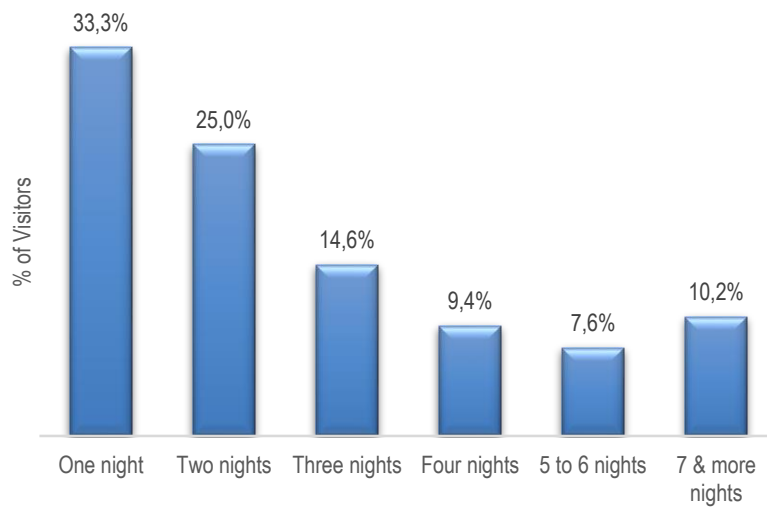
4.8 Overnight stay



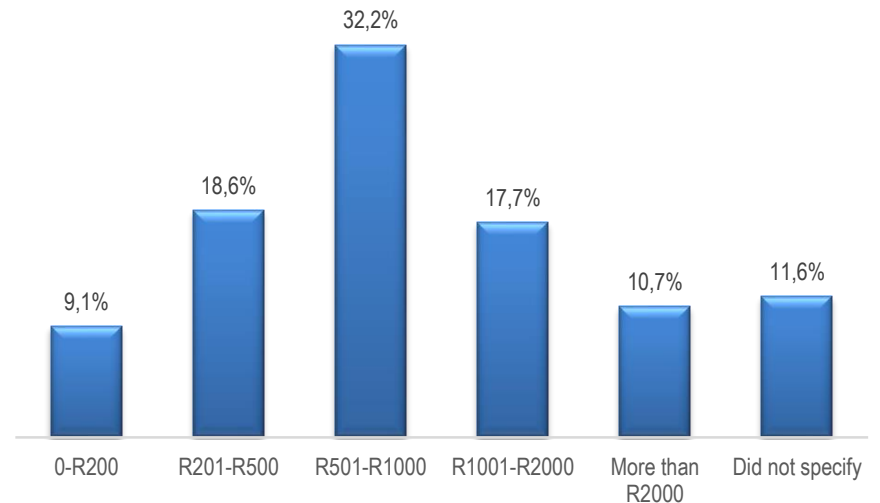
4.10 Average Spend on Accommodation



4.9 Average Length of Stay

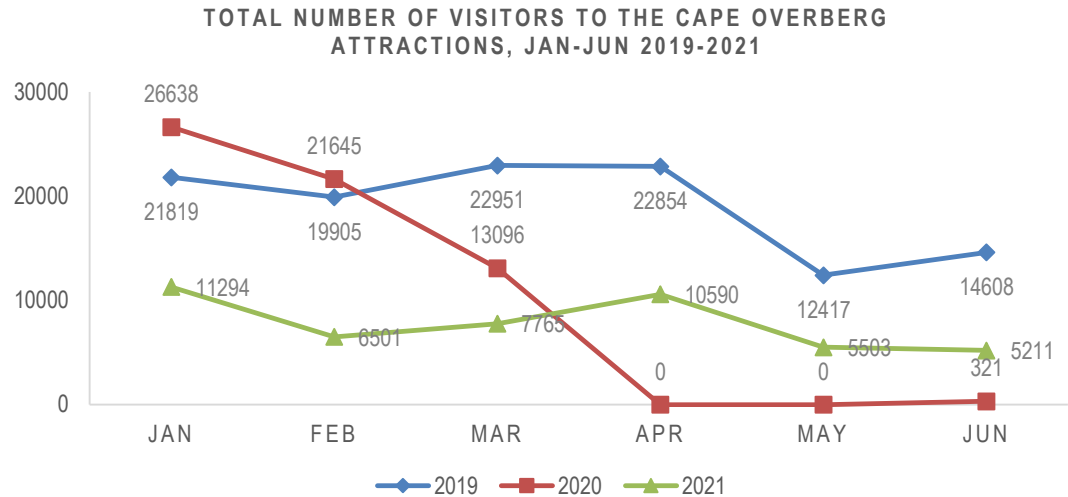


4.11 Average Daily Spend

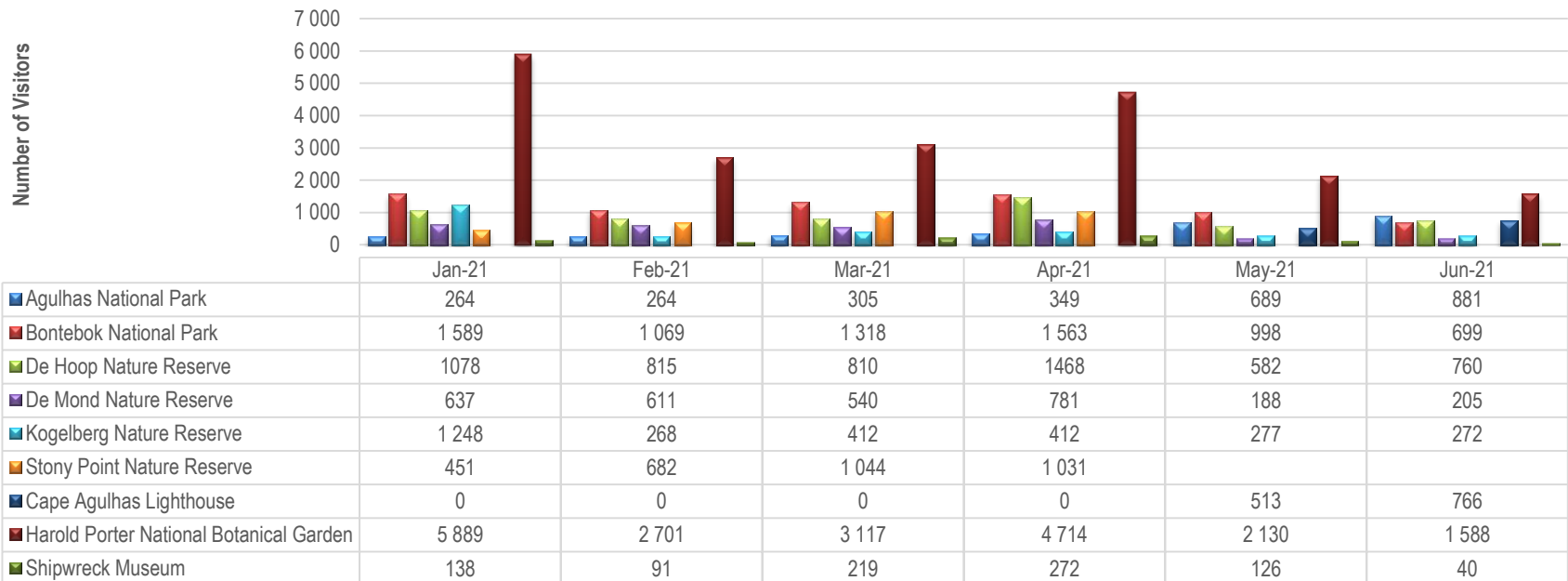


5. Performance of Cape Overberg Attractions

- The participating Cape Overberg attractions recorded a combined total of 46 864 visitors between January and June 2021, with a 41% recovery rate compared to the same period in 2019.
- Visitor numbers were highest in January and April, which coincide with the festive season and Easter holiday periods.
- Outdoor attractions like Harold Porter Botanical Gardens, Bontebok National Park, De Hoop Nature Reserve, De Mond Nature Reserve, and Kogelberg Nature Reserve have been particularly popular having exceeded their 2019 figures in some months.



TOTAL NUMBER OF VISITORS TO THE CAPE OVERBERG ATTRACTIONS, JAN - JUN 2021



5. Performance of Cape Overberg Attractions

PARTICIPATING REGIONAL ATTRACTIONS - MONTHLY RECOVERY PERCENTAGE						
ATTRACTIONS	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21
Cape Agulhas Lighthouse	0%	0%	0%	0%	42%	36%
Agulhas National Park	7%	8%	8%	12%	47%	37%
Bontebok National Park	84%	59%	66%	106%	76%	53%
De Hoop Nature Reserve	59%	55%	47%	106%	113%	172%
De Mond Nature Reserve	51%	101%	52%	167%	66%	56%
Harold Porter National Botanical Gardens	200%	97%	85%	75%	82%	63%
Kogelberg Nature Reserve	379%	101%	75%	38%	80%	81%
Stony Point	8%	10%	18%	17%	-	-
Shipwreck Museum	20%	13%	30%	57%	20%	4%

Notes: Blank cells indicate that the data was not available at time of publication.

6. Cape Overberg Towns

OVERVIEW OF CAPE OVERBERG TOWNS VISITOR TRENDS AND PATTERNS, JAN – JUN 2021			
TOURISM INDICATOR	Stanford	Hangklip Kleinmond	Hermanus
% Share overseas	0,2%	0,2%	8,5%
% Share domestic	99,8%	99,8%	91,5%
% Share of overnight visitors	40%	40,2%	83,4%
% Share of day visitors	60%	59,8%	16,6%
Top domestic markets	Western Cape (97,5%)	Western Cape (85,3%)	Western Cape (79,4%)
	Gauteng (0,6%)	Gauteng (6,8%)	Eastern Cape (5,9%)
Main purpose of visit	Leisure/holiday (77,4%)	Leisure/holiday (45,5%)	Leisure/holiday (79,4%)
	Business (6,8%)	VFR (35,2%)	Events/festivals (6,7%)
Age profile of visitors	36-50 (52,4%)	21-35 (40,6%)	36-50 (39,5%)
	51-70 (25,7%)	36-50 (40,8%)	51-70 (38,1%)
Most common travel group size	Alone (50,7%)	Alone (62%)	Pairs (52%)
	Pairs (38,1%)	Pairs (32%)	Groups of 4 (20,2%)
Most common length of stay	One night (39,4%)	One night (47,7%)	Two nights (50%)
	Two nights (17,6%)	Three nights (14,5%)	One night (14%), Three nights (14%)
Most common mode of transport	Own motor vehicle (93,6%)	Own motor vehicle (44,7%)	Own motor vehicle (91%)
	Rented car (1,5%)	Rented car (27,4%)	Rented car (6,3%)
Top information source	VIC (88%)	Word of mouth (42,1%)	Return visit (35,9%)
	Word of mouth (10,4%)	VIC (29,3%)	Internet (29,6%)
	-	Return visit (20,7%)	Word of mouth (12,1%)
Average daily spend	R0-R200 (23,4%)	R501-R1000 (46,8%)	R1001-R2000 (44,8%)
Type of accommodation (overnight visitors)	Self-Catering (50,3%)	Self-Catering (49,5%)	Guesthouse (30,6%)
	B&B (8,3%)	Friends/relatives (14,5%), Guesthouse (14,5%)	Hotel (18,3%)

Notes: Blank cells indicate that the sample was not big enough for a valid statistical interpretation.

7. Acknowledgements

Acknowledgements and many thanks go to the following for supplying the data which made this publication possible and whose continued and unwavering support will sustain the forthcoming issues.

The participating local tourism offices in the Cape Overberg:

- Cape Agulhas
- Gansbaai
- Hangklip Kleinmond
- Hermanus
- Stanford

The participating attractions in the Cape Overberg:

- Agulhas National Park
- Bontebok National Park
- De Hoop Nature Reserve
- De Mond Nature Reserve
- Kogelberg Nature Reserve
- Cape Agulhas Lighthouse
- Harold Porter National Botanical Garden
- Stony Point
- Shipwreck Museum

Wesgro has taken every effort to ensure that the information in this publication is accurate. We provide said information without representation or warranty 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, 2021.