



Cape Overberg Regional Trends

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research

2019

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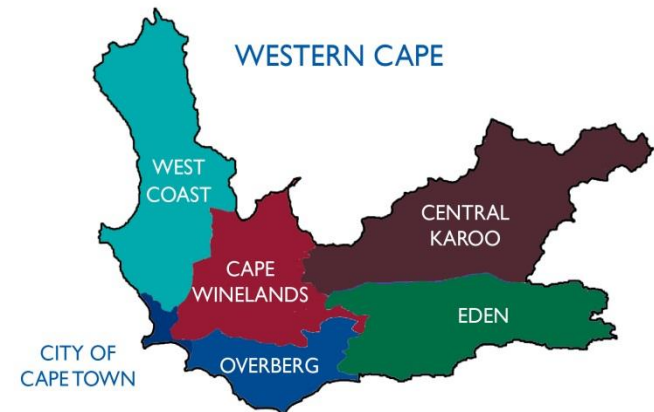
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1. Methodology

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 December 2019, a total of **1,643** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Cape Overberg. The participating Tourism Offices were:

Cape Agulhas	73
Gansbaai	232
Hangklip Kleinmond	352
Hermanus	132
Stanford	854



3. Executive Summary

- With its headquarters in Bredasdorp, the Overberg District Municipality governs the four local municipalities of Cape Agulhas, Overstrand, Swellendam and Theewaterskloof. The Overberg has always been considered as the breadbasket of the Cape and is largely known for its grain farming, especially wheat. The wheat fields are a major breeding ground for South Africa's national bird, the Blue Crane.
- Tourism offices based within these municipalities welcomed a share of 58.9% international travellers and 41.1% of visitors were from the domestic market.
- United Kingdom (33.0%), Germany (30.7%), and France (5.0%) ranked as the region's top three international markets over the Jan – Dec 2019 period. The domestic market was led by travellers from the Western Cape (73.1%) and Gauteng (10.5%).
- Holiday/leisure ranked as the strongest driver for travel to the region, with 82.7% of visitors mainly travelling for leisure. VFR (6.8%) followed as the second largest share of travellers to the region.
- The most common age profile of visitors to the Cape Overberg were between 36-50 (30.2%) and 51-70 (22.5%) years. Visitors to the region mainly travelled in pairs (60.3%) and on their own (17.3%).
- More than 80% of respondents indicated overnight stays, majority of which stayed for an average of one (46.1%), two (17.1%) and three nights (7.2%).
- Word of mouth (50.2%) and return visits (14.9%) ranked as the leading information sources used by visitors to obtain information on the region.
- Visitors spent on average R501-R1000 (35.6%) per day in the region. The top three activities enjoyed during the Jan – Dec 2019 period included scenic drives, cuisine, and outdoor activities.
- The Cape Overberg attractions recorded a combined total of 262 445 visitors between January and December 2019. Stony Point Nature Reserve (85 694) and Harold Porter Botanical Gardens (43 394) were by far the most visited amongst the attractions included in this review region.

Cape Overberg Visitor Trends 2019

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0%

share of overseas visitors	58.9%
share of domestic visitors	41.1%
share of overnight visitors	80.6%
share of day visitors	19.4%

Top 3

international markets

United Kingdom (33%)
Germany (30.7%)
France (5%)

Top 3

domestic markets

Western Cape (73.1%)
Gauteng (10.5%)
KZN (6.4%)

Main purpose of visit



Holiday/Leisure 82.7%



Business 4.4%



VFR 6.8%



Travel group size

Pairs 60.3%
Alone 17.3%

Age group

36-50 (30.2%)
51-70 (22.5%)

Length of stay

1 night 46.1%

2 nights 17.1%

3 nights 7.2%



Rented car — 48.1%
Own vehicle — 41.4%

Top information sources

Return Visit.....14.9%
Word of mouth.....50.2%

Average daily spend
R501 – R1000 (35.6%)



Top 3

activities in the Cape Overberg

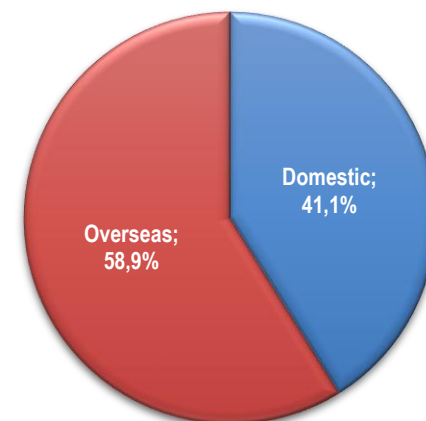
Scenic Drives (44.4%)
Outdoor Activities (36.7%)
Cuisine (38.2%)

4. Cape Overberg Visitor Trends & Patterns

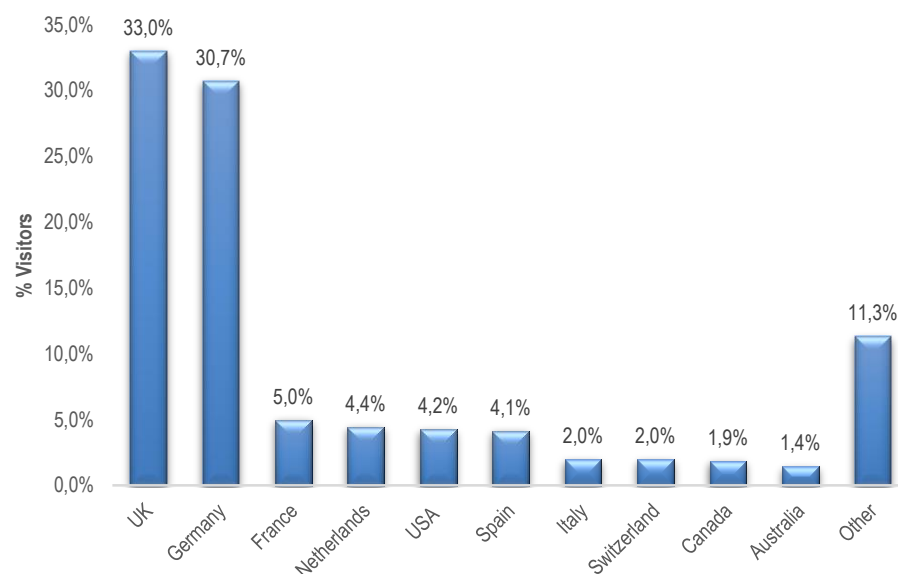
4.1 Origin of Visitors

- Overseas visitors made up 58,9% of travellers to the Cape Overberg over the Jan – Dec 2019 period.
- Traditional markets such as the United Kingdom, Germany, and France ranked as the region's top three international markets.
- European travellers continue to drive tourism activity in the Cape Overberg. In addition to UK, Germany, France, Netherlands, Spain, Italy and Switzerland, the vast majority of countries grouped under the 'Other' category are European.
- In addition, the region saw visitors traveling from South American countries such as Brazil, Argentina, Chile, Mexico, and Colombia, as well as Namibia, and Zimbabwe in Africa. India and China were the leading markets from the Asian continent.
- Despite financial and economic constraints, trends indicate that domestic travellers continue to travel. The largest share of domestic travellers to the region originated from the Western Cape, followed by Gauteng and Kwazulu Natal.

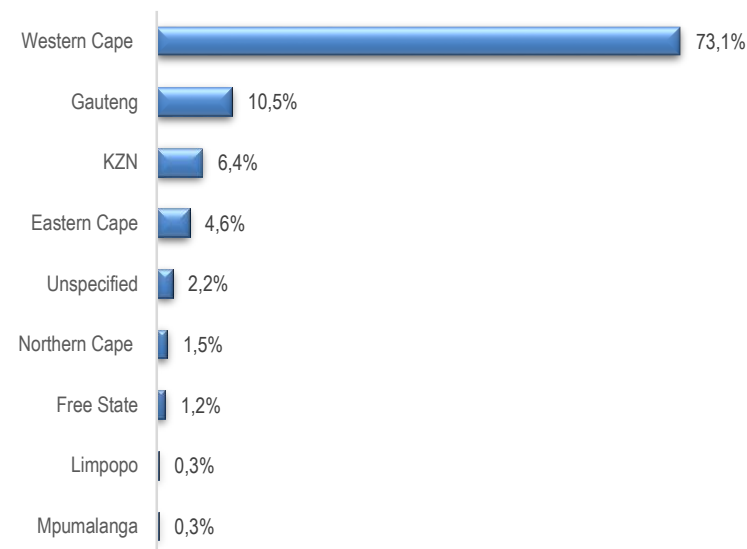
% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO THE CAPE OVERBERG, 2019



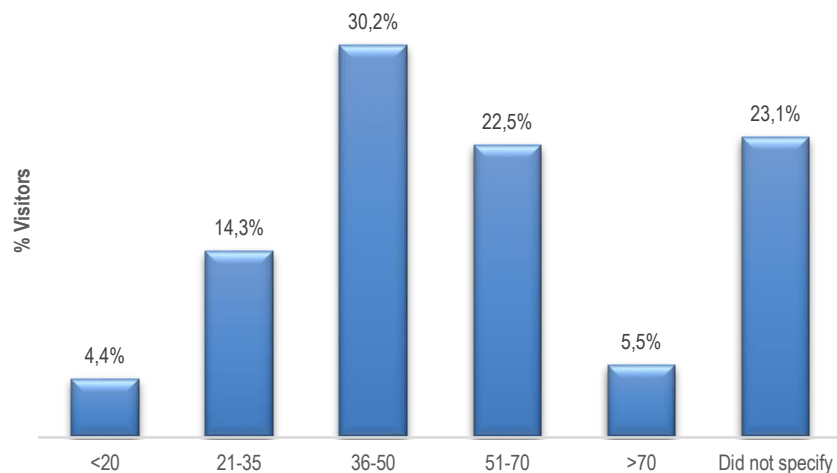
TOP INTERNATIONAL VISITORS TO THE CAPE OVERBERG, 2019



% SHARE OF DOMESTIC VISITORS TO THE CAPE OVERBERG, 2019

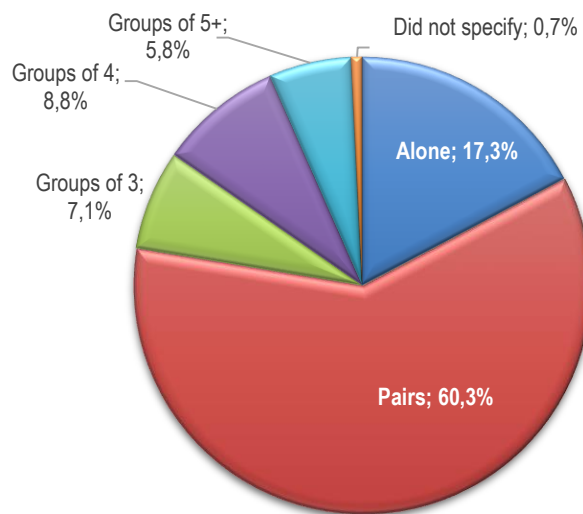


4.2 Age profile of visitors

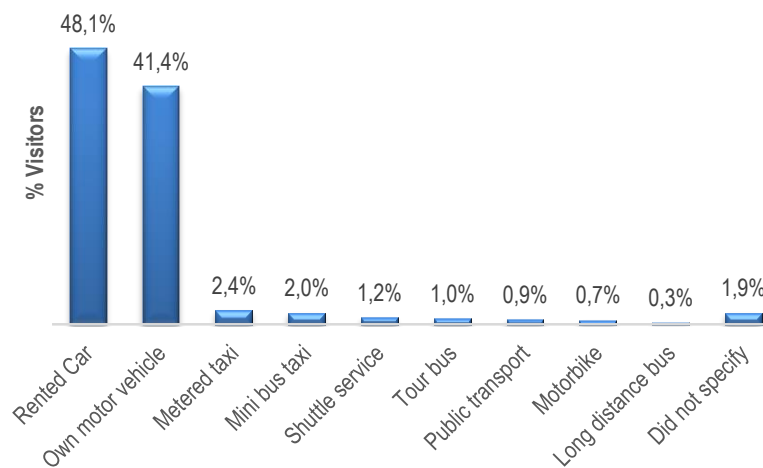


- The Overberg is a region that stretches along coasts with beautiful beaches, and over mountain ranges with interesting geological formations, abundant birdlife and fynbos, making it an all-round destination for all ages.
- In 2019, the leading age group was between 36 and 50 years (30,2%). A further 22,5% of respondents were between the ages of 51 and 70 years.
- Group travel was preferred with majority of respondents travelling in pairs (60,3%) and in groups of three or more (21,7%).
- Majority of respondents travelled to the region via rented cars (48,1%) or own motor vehicles (41,4%).

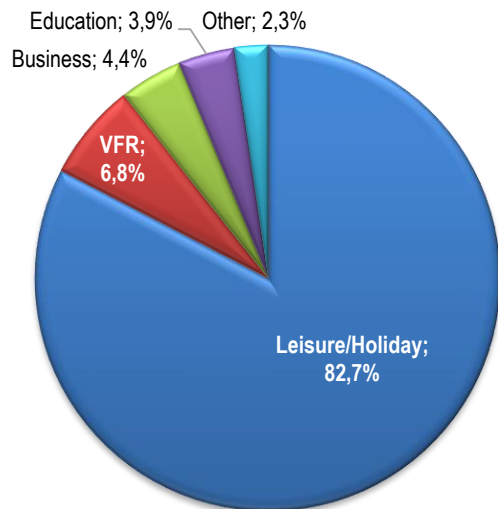
4.3 Group size



4.4 Mode of transport



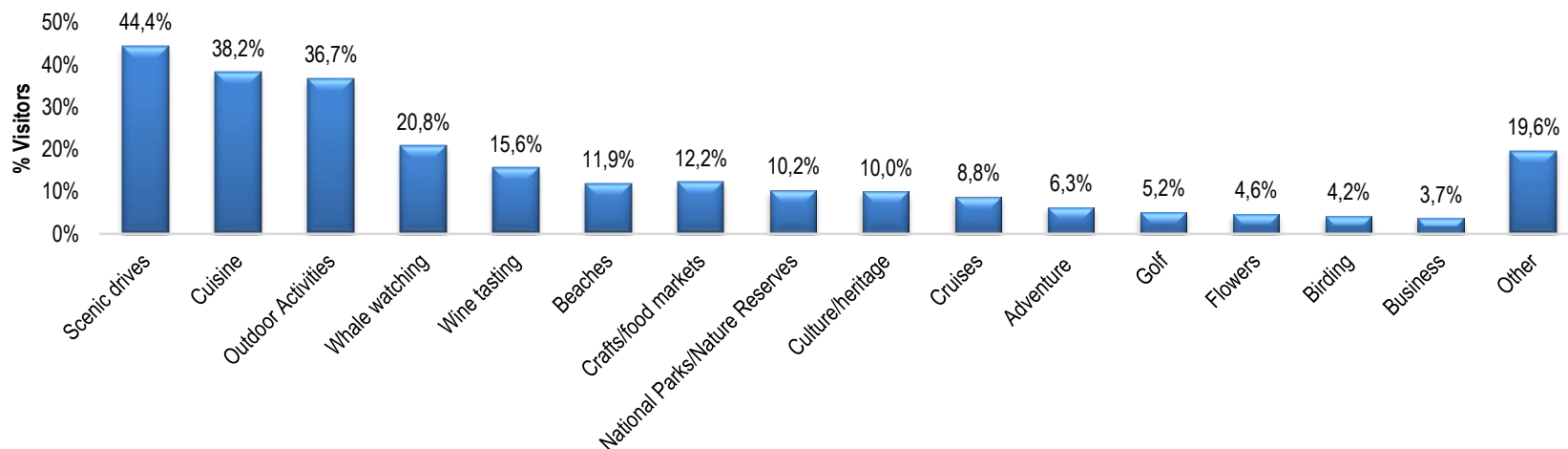
4.5 Purpose of visit



**Other: Includes travel for events, honeymoon/weddings, medical, sport, seasonal/migrant worker.*

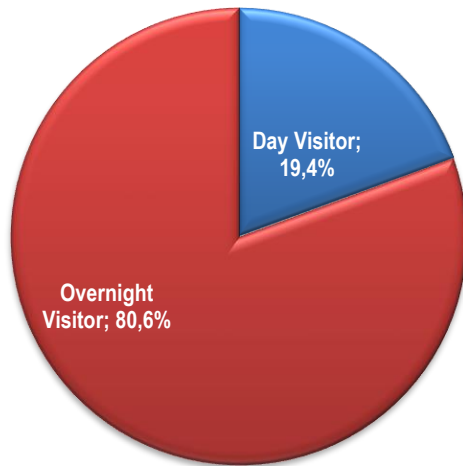
- The most prominent motivating factor for travel to the Cape Overberg was for the purpose of holiday/leisure (82,7%).
- Travel for Visiting Friends/Relatives (6.8%) and Business (4,4%) ranked as part of the top 3 reasons for visiting the Cape Overberg region.
- Scenic drives (44,4%), cuisine (38,2%), and outdoor activities (36,7%) were the top 3 activities undertaken in the region.
- Activities under the 'other' category included Cycling, Fishing, Events, Shopping, Game Reserves, Expos/exhibitions, Shark cage diving, Health & wellness, Sporting events-participator, Nighlife/clubbing.

4.6 Top Activities Undertaken in the Cape Overberg

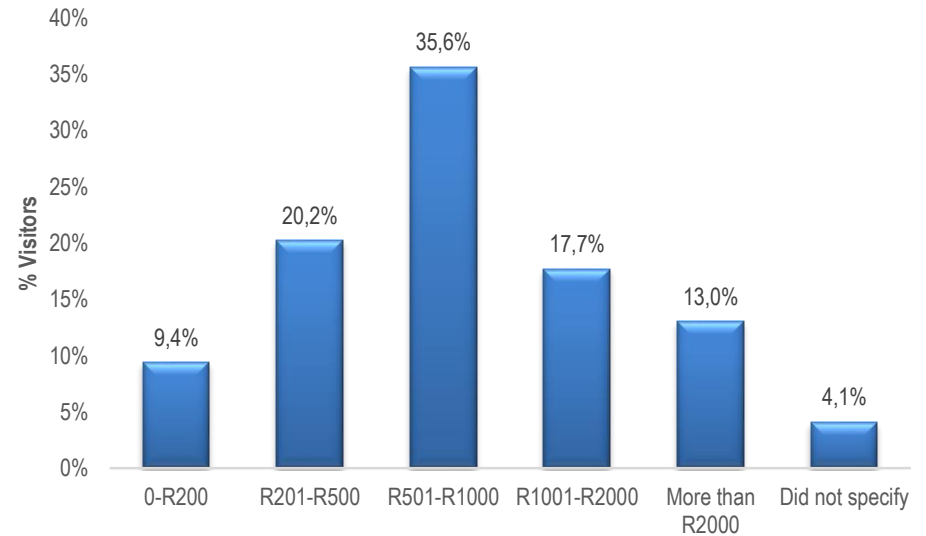


**Other: Includes Cycling, Fishing, Events, Shopping, Game Reserves, Expos/exhibitions, Shark cage diving, Health & wellness, Sporting events-participator, Nighlife/clubbing.*

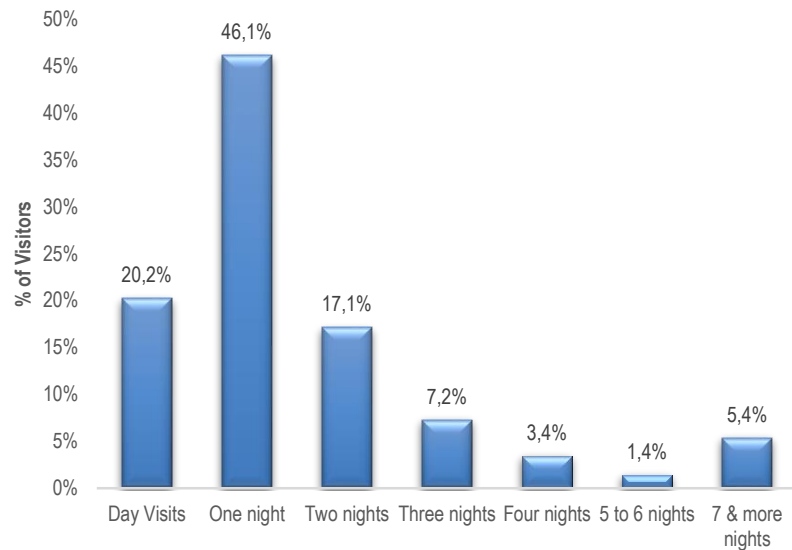
4.7 Overnight stay



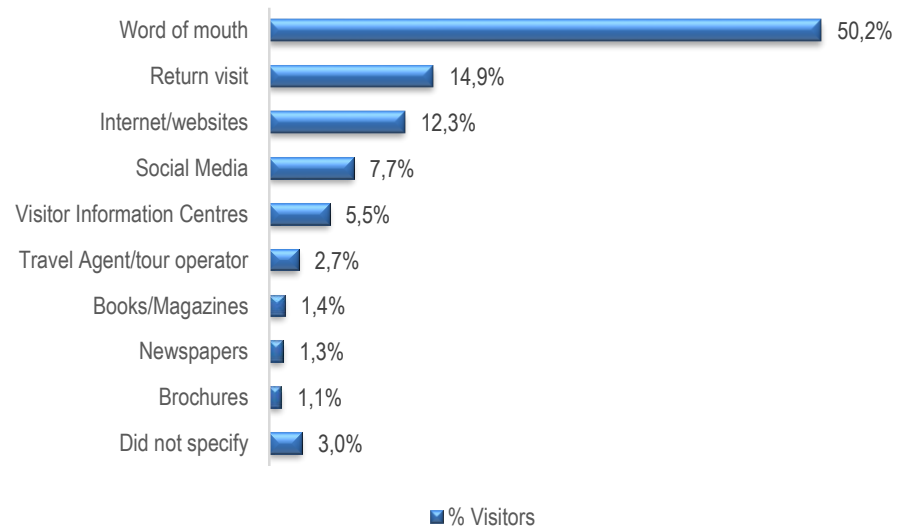
4.8 Average Daily Spend



4.9 Average Length of Stay



4.10 Top information sources



5. Cape Overberg Towns

OVERVIEW OF CAPE OVERBERG TOWNS VISITOR TRENDS AND PATTERNS, JAN-DEC 2019			
TOURISM INDICATOR	Stanford	Hangklip Kleinmond	Gansbaai
% Share overseas	60.4%	90.9%	75.0%
% Share domestic	39.6%	9.1%	25.0%
% Share of overnight visitors	Overnight Visitors (97.3%)	Overnight Visitors (41.2%)	Overnight Visitors (78.0%)
% Share of day visitors	Day Visitors (2.7%)	Day Visitors (58.8%)	Day Visitors (22.0%)
Top international markets	UK (42.0%)	UK (42.5%)	Germany (35.1%)
	Germany (23.1%)	Germany (35.6%)	UK (10.3%)
Top domestic markets	Western Cape (82.8%)	Gauteng (43.8%)	Western Cape (43.1%)
	KZN (7.0%)	Eastern Cape (28.1%)	Gauteng (27.6%)
Main purpose of visit	Leisure/holiday (98.4%)	Leisure/holiday (51.4%) VFR (24.4%)	Leisure/holiday (90.5%)
Age profile of visitors	36-50 (38.9%)	36-50 (41.8%)	-
Most common travel group size	Pairs (64.9%)	Pairs (56.8%)	Pairs (62.9%)
	Alone (15.2%)	Alone (24.7%)	Groups of 4 (15.1%)
Most common length of stay	One night (74.8%)	One night (35.2%)	Two nights (33.1%)
	Two nights (16.0%)	7+ nights (31.0%)	One night (21.5%)
Most common mode of transport	Own motor vehicle (57.1%)	Rented car (45.5%)	Tour bus (53.8%)
	Rented car (39.9%)	Own motor vehicle (25.0%)	Own motor vehicle (32.3%)
Top information source	Word of mouth (66.4%)	Word of mouth (43.8%)	Internet (36.2%)
	Return visit (11.0%)	Return visit (28.4%)	Word of mouth (33.2%)
	Social Media (10.8%)	VIC (8.0%)	Return visit (9.5%)
Average daily spend	R501-R1000 (35.9%)	R501-R1000 (54.8%)	R201-R500 (33.6%)
Type of accommodation (overnight visitors)	-	Self-Catering (39.3%)	Guesthouse (20.4%)
	-	Friends/relatives (20.7%)	Self-Catering (18.2%)

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

6. Trends and Patterns by Origin of Visitors

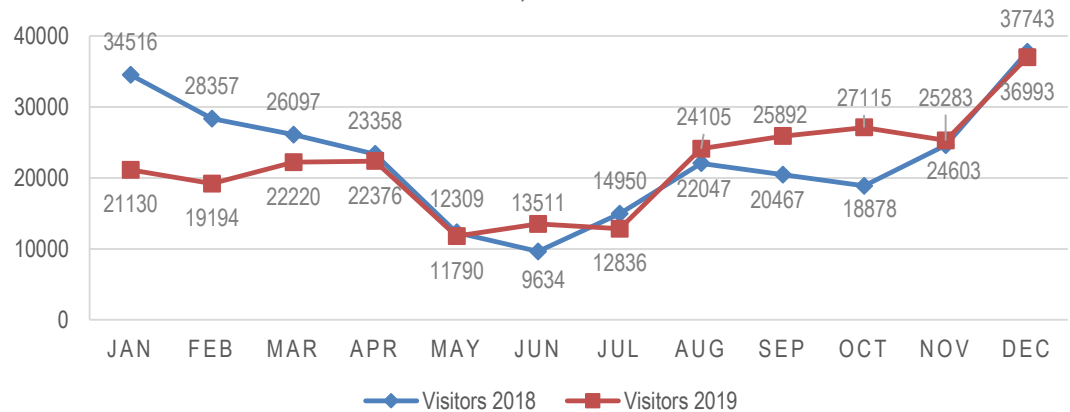
OVERVIEW OF TRENDS AND PATTERNS BY ORIGIN OF VISITOR, JAN-DEC 2019		
TOURISM INDICATOR	Overseas	Domestic
% Share day visitors	25.4%	10.8%
% Share overnight visitors	74.6%	89.2%
Age profile of visitors	36-50 years (31.3%)	36-50 years (28.6%)
Main purpose of visit	Leisure/Holiday (81.6%)	Leisure/holiday (84.2%)
	VFR (8.2%)	Education (6.2%)
	Business (5.1%)	VFR (4.7%)
Most common travel group size	Pairs (65.8%)	Pairs (52.5%)
	Alone (14.7%)	Alone (21.0%)
Most common length of stay	1 night (47.0%)	1 night (69.3%)
	2 nights (25.9%)	2 nights (15.6%)
	3 nights (11.5%)	3 nights (6.0%)
Mode of transport	Rented car (76.8%)	Own motor vehicle (87.0%)
Top information sources	Word of mouth (48.4%)	Word of mouth (52.8%)
	Return visit (13.9%)	Return visits (16.4%)
	Internet/websites (13.4%)	Internet/websites (10.7%)
Average daily spend	R501-R1000 (34.2%)	R501-R1000 (37.6%)

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

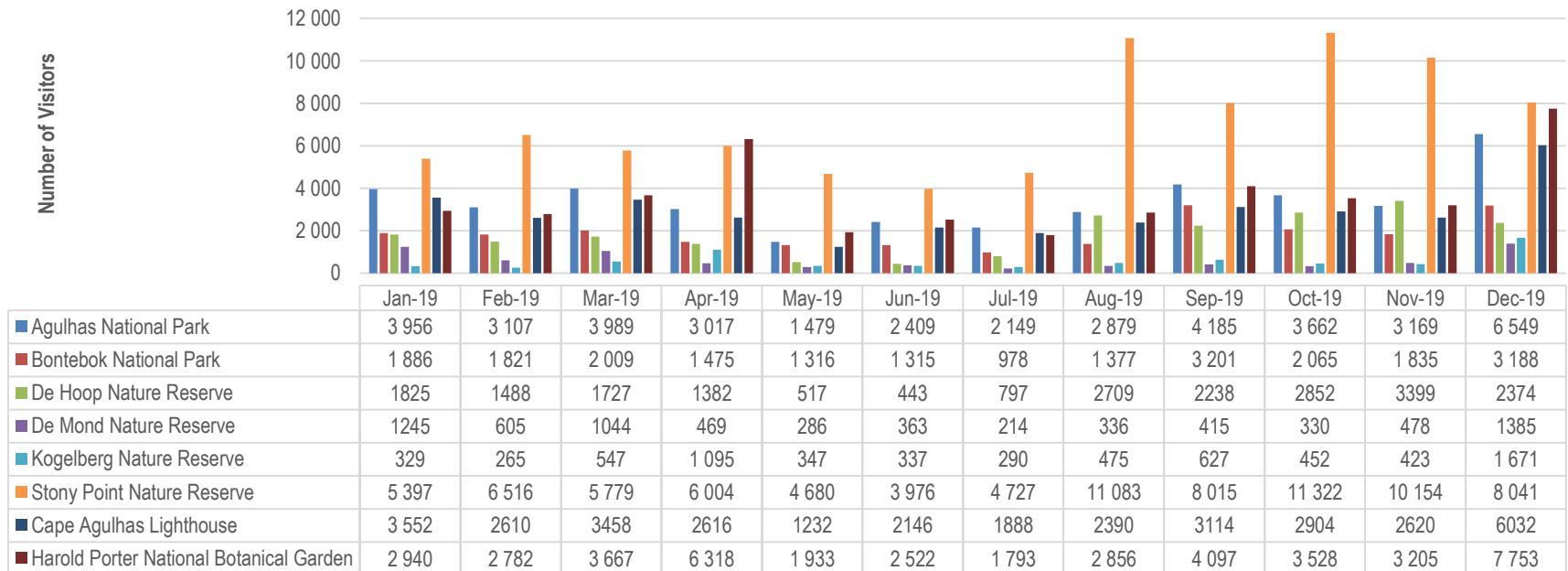
7. Performance of Cape Overberg Attractions

- The Cape Overberg attractions included in this review recorded a combined total of 262, 445 visitors between January and December 2019.
- Visitor numbers show an overall decrease of 3,9% over the same period in 2018.
- By month, attractions in the region welcomed the peak of their visitors between September and December 2019.
- Stony Point Nature Reserve and Harold Porter Botanical Gardens were by far the most visited amongst attractions included in this review. These two popular attractions recorded a combined total of 129 088 visitors which accounts for 49.2% of all visitors to attractions in the Cape Overberg region.

TOTAL NUMBER OF VISITORS TO THE CAPE OVERBERG ATTRACTIONS, JAN-DEC 2018/19



TOTAL NUMBER OF VISITORS TO THE CAPE OVERBERG ATTRACTIONS, JAN - DEC 2019



9. 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:

- Barrydale
- Bredasdorp
- Cape Agulhas
- Gansbaai
- Hangklip Kleinmond
- Hermanus
- Stanford
- Swellendam
- Villiersdorp

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 and
- Stony Point

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