



Cape Overberg Regional Trends

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research

January to June 2019

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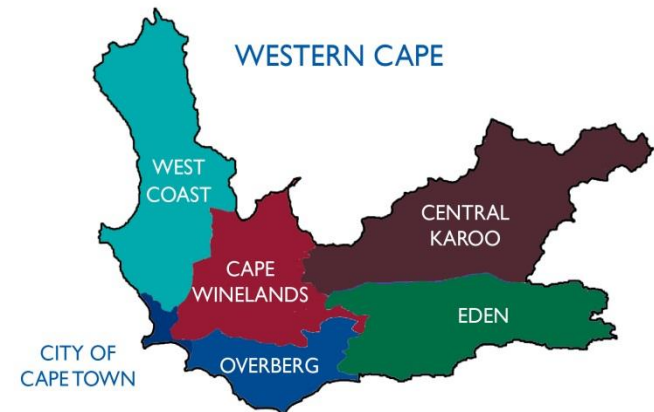
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1. Methodology

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 June 2019, a total of **861** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Cape Overberg. A significant decrease in survey responses was recorded when compared to the same period in 2018. This is attributed to the closure of 4 tourism offices since June 2018.

The participating Tourism Offices in the 2019 visitor tracking surveys were:

Cape Agulhas	61
Gansbaai	90
Hangklip Kleinmond	183
Hermanus	89
Stanford	438

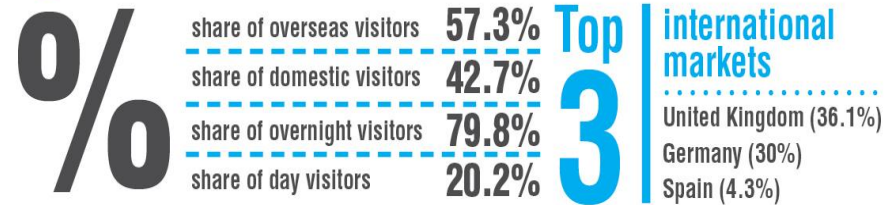


3. Executive Summary

- 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 57.3% international travellers and 42.7% of visitors were from the domestic market.
- United Kingdom (36.1%), Germany (30.0%), and Spain (4.3%) ranked as the region's top three international markets over the Jan – Jun 2019 period. The domestic market was led by travellers from the Western Cape (73.6%) and Gauteng (9.0%).
- Holiday/leisure ranked as the strongest driver for travel to the region, close to 80% of visitors mainly travelling for leisure. Visiting Friends and Relatives (7.2%) 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 (28.5%) 51-70 (23.5%) years. Visitors to the region mainly travelled in pairs (61.2%) and on their own (14.5%).
- Nearly 80% of respondents indicated overnight stays, majority of which stayed for an average of one (44.9%), two (17.0%) and three nights (7.4%).
- Word of mouth (54.4%) and return visits (15.6%) ranked as the leading information sources used by visitors to obtain information on the region.
- Visitors spent on average R501-R1000 (37.0%) per day in the region.
- The top three activities enjoyed during the Jan – Jun 2019 period included scenic drives, cuisine, and outdoor activities.
- The Cape Overberg attractions recorded a combined total of 110 221 visitors between January and June 2019.
- Stony Point Nature Reserve and Harold Porter Botanical Gardens were by far the most visited attractions in the region.

Cape Overberg Visitor Trends Jan - Jun 2019

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Main purpose of visit



Travel group size

Pairs 61.2%
Alone 14.5%

Age group

36-50 (28.5%)
51-70 (23.5%)

Length of stay

1 night 44.9%
2 nights 17%
3 nights 7.4%



Transport

- Rented car 47.2%
- Own vehicle 41%

Top information sources

Return Visit.....15.6%
Word of mouth.....54.4%

Average daily spend
R501 – R1000 (37%)



Top 3 activities in the Cape Overberg

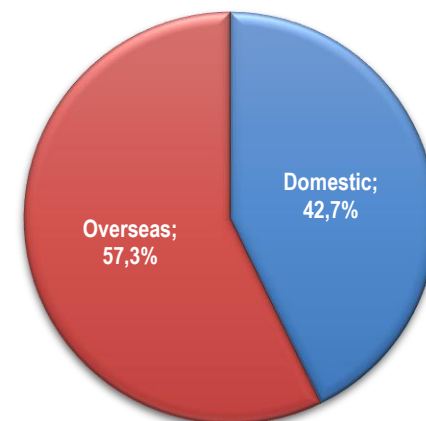
- Scenic Drives (45.3%)
- Outdoor Activities (36.2%)
- Cuisine (39.7%)

4. Cape Overberg Visitor Trends & Patterns

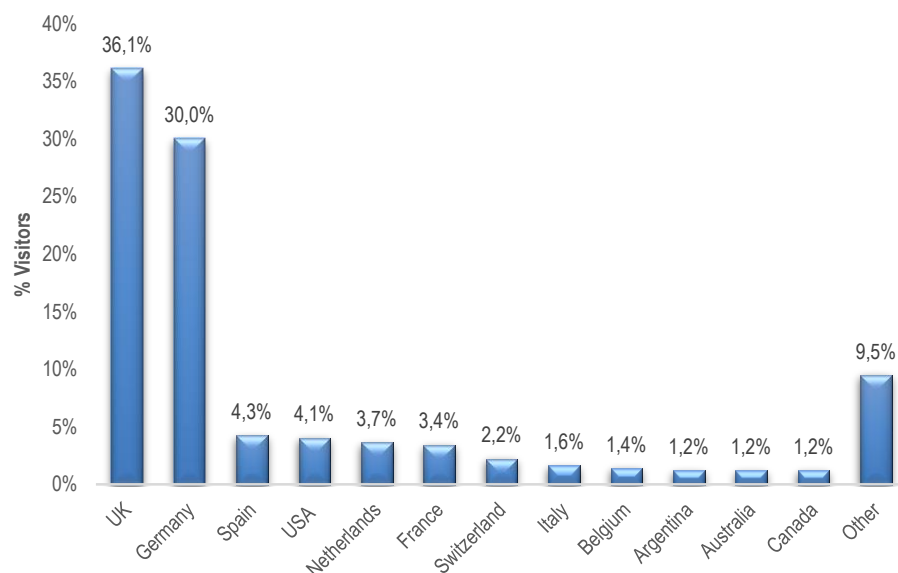
4.1 Origin of Visitors

- Overseas visitors made up 57,3% of travellers to the Cape Overberg over the Jan – Jun 2019 period.
- Traditional markets such as the United Kingdom, Germany, and Spain ranked as the region's top three international markets.
- European travellers continue to drive tourism activity in the Cape Overberg. In addition to Germany, Spain, Netherlands, France, Switzerland, Italy, Belgium and Argentina, a third of the countries grouped under the 'Other' category are European as well.
- In addition, the region saw visitors traveling from South American countries such as Argentina, Brazil, Chile, and Mexico, as well as Israel in the Middle East. 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 the Northern Cape.

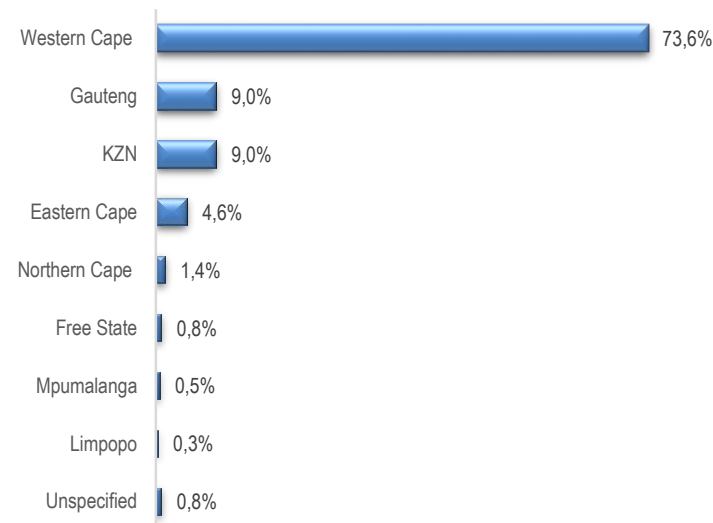
% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO THE CAPE OVERBERG, JAN-JUN 2019



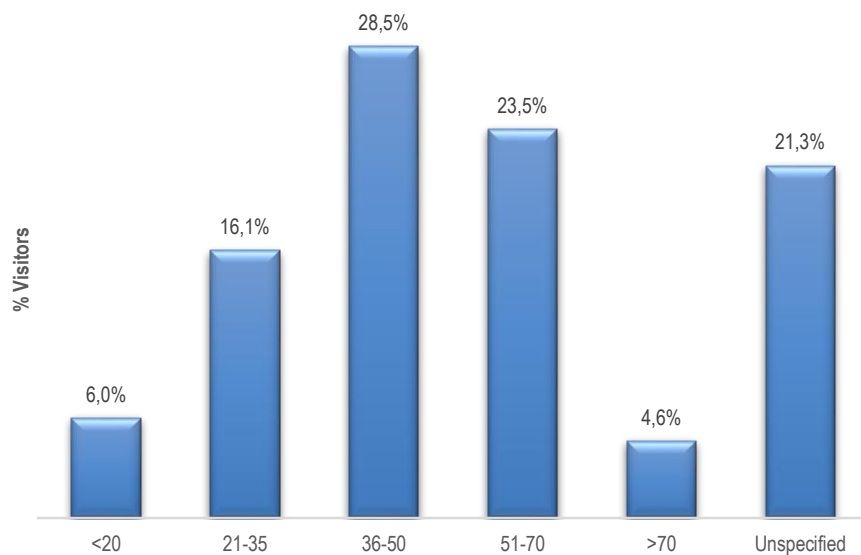
TOP INTERNATIONAL VISITORS TO THE CAPE OVERBERG, JAN - JUN 2019



% SHARE OF DOMESTIC VISITORS TO THE CAPE OVERBERG, JAN - JUN 2019

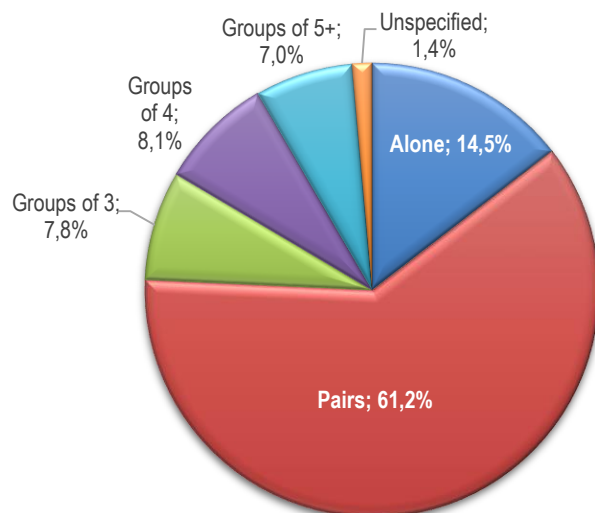


4.2 Age profile of visitors

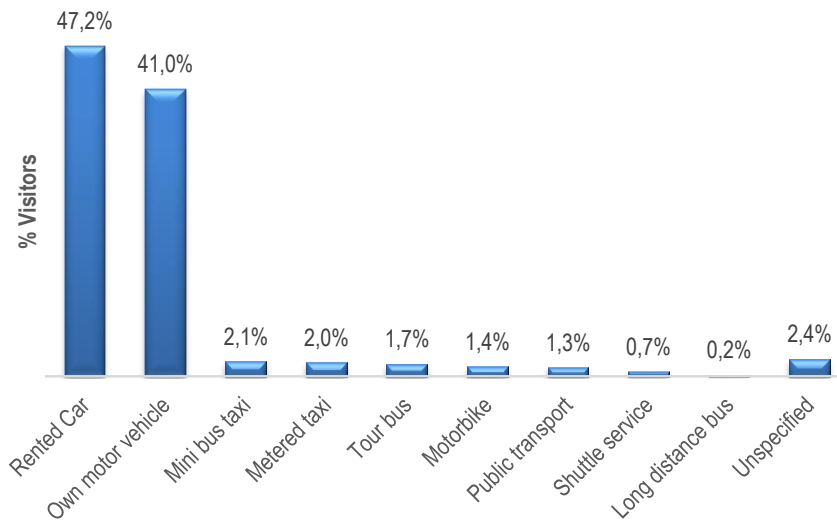


- The Overberg is a region that stretches along coasts with beautiful beaches, and over mountain ranges with interesting geological formations, abundant birdlife and fynbos, making it an all-round destination for all ages.
- The leading age group, was between the ages of 36 and 50 years (28,5%). A further 23,5% of respondents were between the ages of 51 and 70 years.
- Group travel was preferred with majority of respondents travelling in pairs (61,2%) and in groups of three or more (22,9%).
- Majority of respondents travelled to the region via rented cars (47,2%) or own motor vehicles (41,0%).

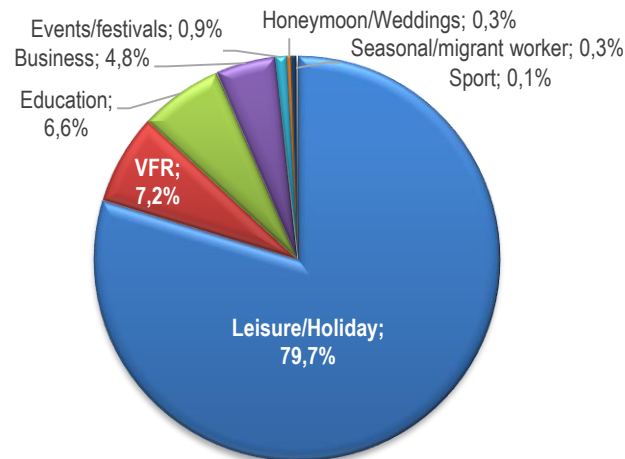
4.3 Group size



4.4 Mode of transport

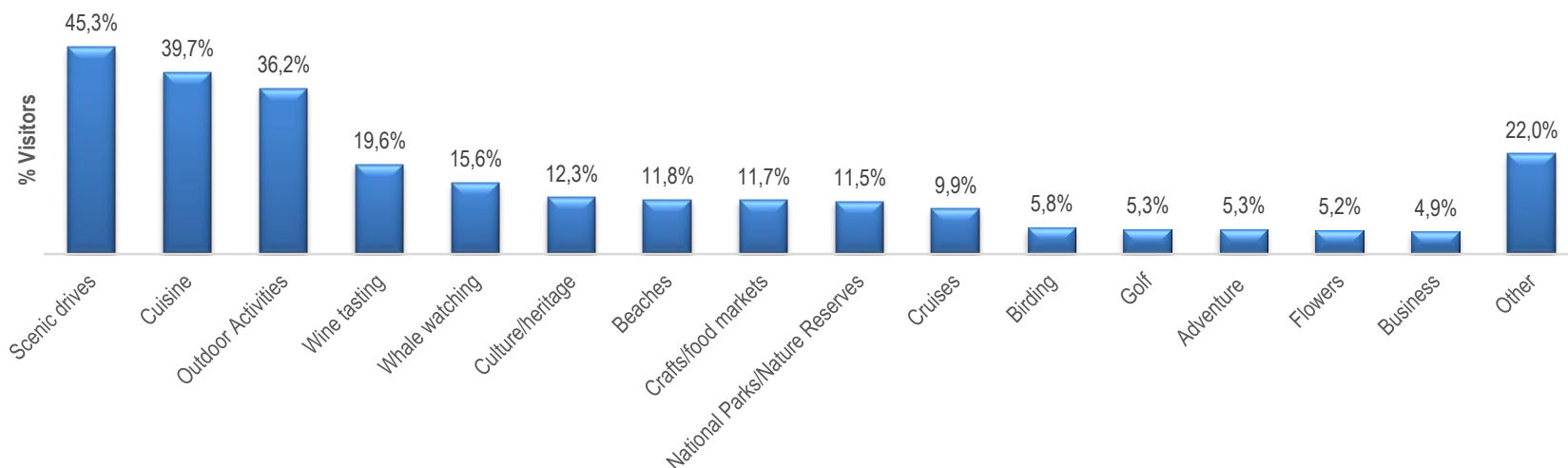


4.5 Purpose of visit



- The most prominent motivating factor for travel to the Cape Overberg was for the purpose of holiday/leisure (79,7%).
- Travel for visiting friends/relatives (7.2%) and Education (6,6%) ranked as part of the top 3 reasons for visiting the Cape Overberg region.
- Scenic drives (45,3%), cuisine (39,7%), and outdoor activities (36,2%), were the top 3 activities undertaken in the region.
- Activities under the 'other' category included Shopping, Fishing, Cycling, Events, Expos/exhibitions, Game Reserves, Shark cage diving, Health & wellness, Sporting events-participator, and Nighthlife/clubbing.

4.6 Top Activities Undertaken in the Cape Overberg

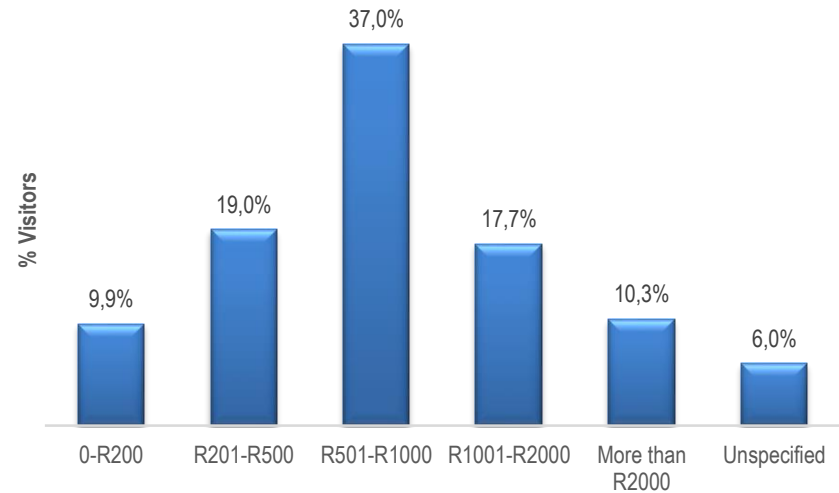


*Other: Includes whale watching, gambling, expos/exhibitions, sport events/spectator, astro tourism, health & wellness/spas, shopping, game reserves, birding, events, golf, cycling, shark cage diving, fishing and flowers.

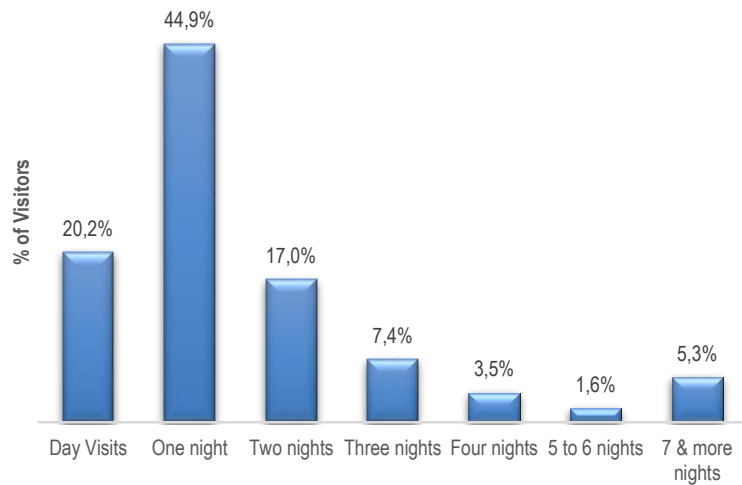
4.7 Overnight stay



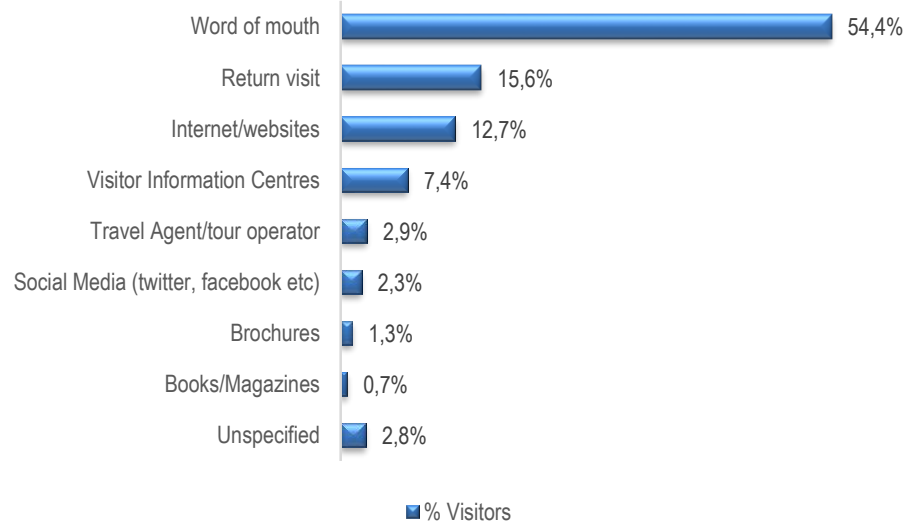
4.8 Average Daily Spend



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 – JUN 2019		
TOURISM INDICATOR	Stanford	Hangklip Kleinmond
% Share overseas	40.9%	88.0%
% Share domestic	59.1%	12.0%
% Share of overnight visitors	97.3%	42.6%
% Share of day visitors	2.7%	57.4%
Top international markets	UK (46.4%)	UK (46.67%)
	Germany (23.5%)	Germany (35.4%)
	Netherlands (6.7%)	Spain (8.1%)
Top domestic markets	Western Cape (85.3%)	Gauteng (40.9%)
	KZN (10.0%)	Eastern Cape (27.3%)
Main purpose of visit	Leisure/holiday (98.2%)	Leisure/holiday (52.5%)
		VFR (26.2%)
Age profile of visitors	51-70 years (37.0%)	36 – 50 years (45.9%)
Most common travel group size	Pairs (68.0%)	Pairs (60.1%)
	Alone (11.6%)	Alone (31.1%)
Most common length of stay (overnight visitors)	One night (73.2%)	7+ nights (35.9%)
	Two nights (17.1%)	One night (32.1%)
Most common mode of transport	Own motor vehicle (54.8%)	Rented car (43.2%)
	Rented car (41.8%)	Own motor vehicle (29.0%)
Top information source	Word of mouth (74.7%)	Word of mouth (45.9%)
	Return visit (11.0%)	Return visit (32.2%)
Average daily spend	R501-R1000 (35.4%)	R501-R1000 (63.9%)
Top Activities	Scenic Drives (55.5%)	Scenic Drives (60.7%)
	Outdoor Activities (50.9%)	Cuisine (53.6%)
	Cuisine (40.9%)	Whale watching (32,8%)

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

6. Trends and Patterns by Origin of Visitors

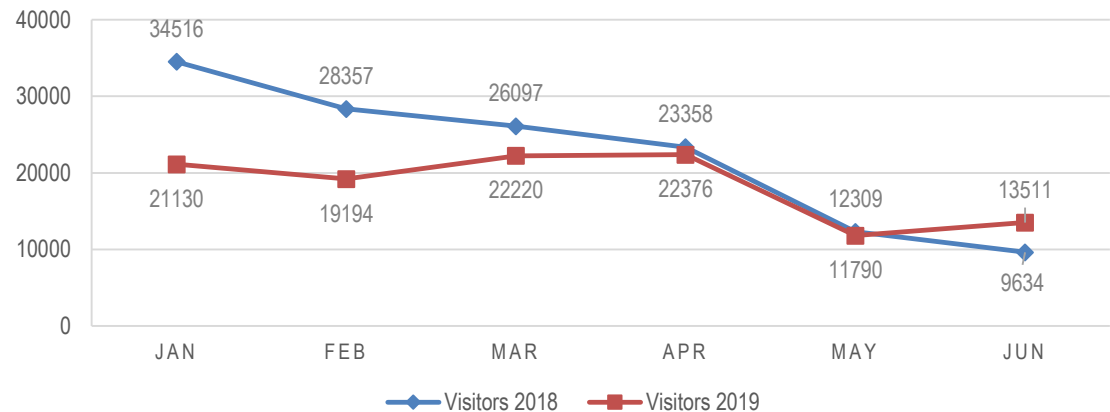
OVERVIEW OF TRENDS AND PATTERNS BY ORIGIN OF VISITOR, JAN – JUN 2019		
TOURISM INDICATOR	Overseas	Domestic
% Share day visitors	24.5%	14.40%
% Share overnight visitors	75.5%	85.6%
Age profile of visitors	36-50 years (32.7%)	51-70 years (28.8%)
Main purpose of visit	Leisure/Holiday (80.9%)	Leisure/holiday (78.0%)
	VFR (9.1%)	Education (11.4%)
	Business (5.5%)	VFR (4.6%)
Most common travel group size	Pairs (67.1%)	Pairs (53.3%)
	Alone (13.8%)	Alone (15.5%)
Most common length of stay (overnight visitors)	1 night (43.0%)	1 night (72.1%)
	2 nights (25.5%)	2 nights (16.2%)
	3 nights (12.9%)	3 nights (5.1%)
Mode of transport	Rented car (75.1%)	Own motor vehicle (82.6%)
Top information sources	Word of mouth (54.2%)	Word of mouth (54.6%)
	Return Visit (15.8%)	Internet/websites (15.8%)
	Internet/websites (10.3%)	Return Visit (15.4%)
Average daily spend	R501-R1000 (37.1%)	R501-R1000 (37.0%)

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

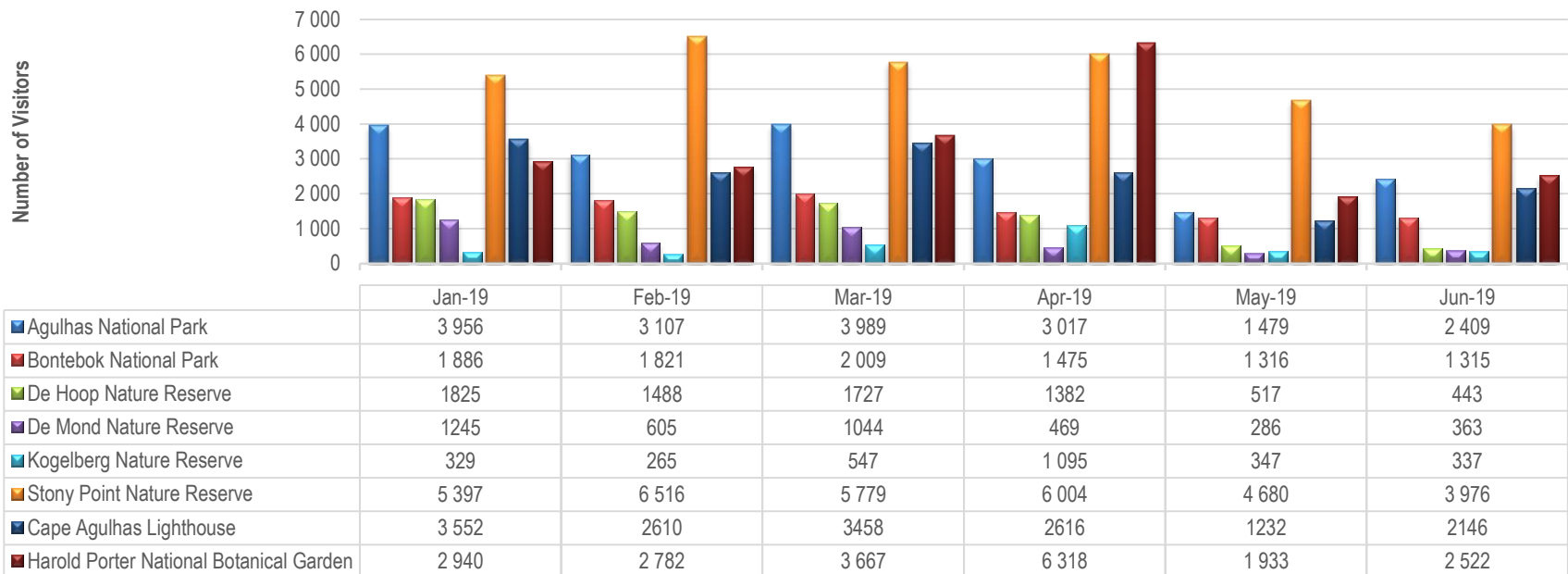
7. Performance of Cape Overberg Attractions

- The Cape Overberg attractions recorded a combined total of 110, 221 visitors between January and June 2019;
- Visitor numbers show an overall decrease of 17,9% over the same period in 2018.
- By month, attractions in the region welcomed the peak of their visitors in January and April 2019.
- Stony Point Nature Reserve and Harold Porter Botanical Gardens were by far the most visited attractions in the region. These two popular attractions recorded a combined total of 52 514 visitors which accounts for 47.6% of all visitors to attractions in the Cape Overberg region.

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



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



8. Cape Overberg Events: January – June 2019

January

- Cape Agulhas Entertainment Carnival: 3,800
- Overberg Landbou Skou: 1,500

February

- Bredasdorp Ladies Golf Day: 10
- Two Oceans Marlin Tournament: 150

March

- Cape Agulhas Mayoral Golf Day: 130
- Rock And Surf Super Pro League WP Bronzies: 300
- Harvest Celebration - Black Oystercatcher Wines: 70
- Stanford River Festival: 312

April

- Cape Agulhas Easter Festival: 100
- Laerskool Bredasdorp Gholfdag: 80

May

- Southern Tip Street Market: 100
- Surf 4 Life Cape Agulhas Surfing Contest: 100

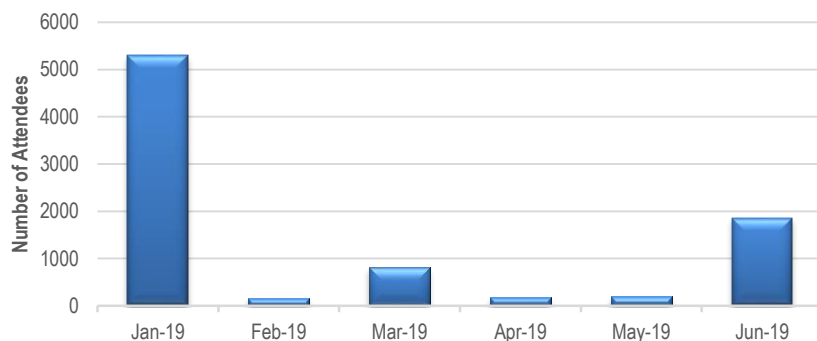
June

- Sanlam Cancer Golf Day: 30
- Shiraz & Venison Week - Strandveld Vineyards: 30
- Napier Wine & Patatfees: 1,200
- Hopps @ the Hills: 600

NUMBER OF ATTENDEES: 8,512

Event locations: Bredasdorp, Struisbaai, Agulhas, Napier, Stanford.

NUMBER OF ATTENDEES TO CAPE OVERBERG EVENTS, JAN - JUN 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:

- 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 and
- Stony Point

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