



## Cape Overberg Regional Trends

**WESGRO**  
cape town & western cape  
research

Annual 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. Accommodation Usage
  - 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.

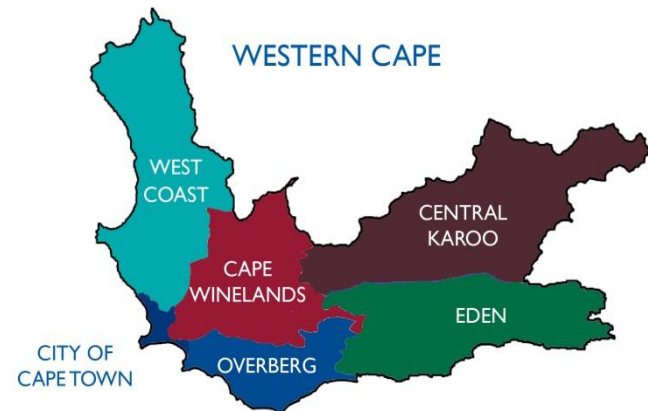
Responses to the regional visitor tracking surveys are used as a proxy to indicate the key trends within the Western Cape and the various regions. It is important to note that absolute figures cannot be determined from these surveys, as the survey responses are a sample of the tourists into the respective 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 December 2021, a total of **2 506** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Cape Overberg. The participating Tourism Offices were:

Gansbaai	191
Hermanus	353
Hangklip Kleinmond	1049
Stanford	913



### 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.
- Participating Cape Overberg attractions recorded a combined total of 144 184 visitors between January and December 2021, a 53% recovery rate compared to the same period in 2019.
- Tourism offices based within the Cape Overberg welcomed a share of 94,4% domestic travellers and 5,6% of visitors were from the overseas markets.
- Germany (34%), United Kingdom (10,6%), and USA (9,2%) ranked as the region's top three international markets.
- The domestic market was led by travellers from the Western Cape (88,9%) 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 72,1% of visitors mainly travelling for leisure. Visiting friends/relatives (VFR) (13,7%) followed as the second largest share of travellers to the region.
- Close to half of respondents indicated overnight stays and the most common age profile of visitors to the Cape Overberg were between 36-50 (40,1%) and 21-35 (23,5%) years.
- Visitors to the region mainly travelled in pairs (41,7%) and on their own (37,9%).
- Visitors spent on average R501-R1000 (25,8%) per day in the region.
- The top three activities enjoyed in 2021 included outdoor activities, cuisine and scenic drives.



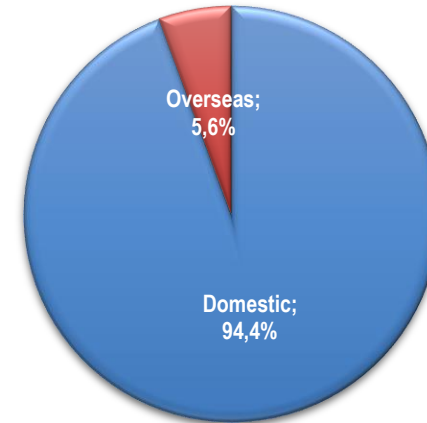


## 4. Cape Overberg Visitor Trends & Patterns

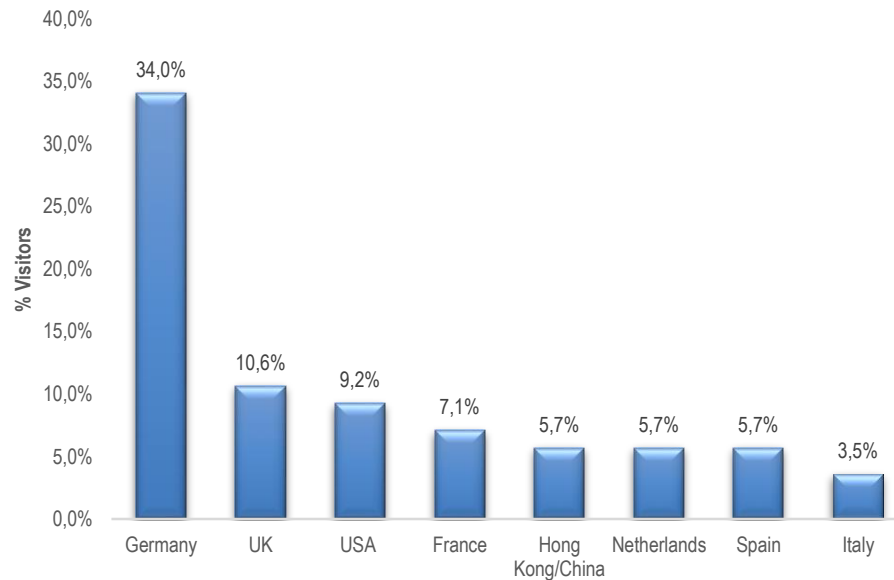
### 4.1 Origin of Visitors

- Domestic visitors made up 94,4% of travellers to the Cape Overberg in 2021, likely due to international travel restrictions brought on by the COVID-19 pandemic.
- Germany ranked as the region's top international market followed by United Kingdom, USA, and France.
- Over the period January to December 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 to the region.

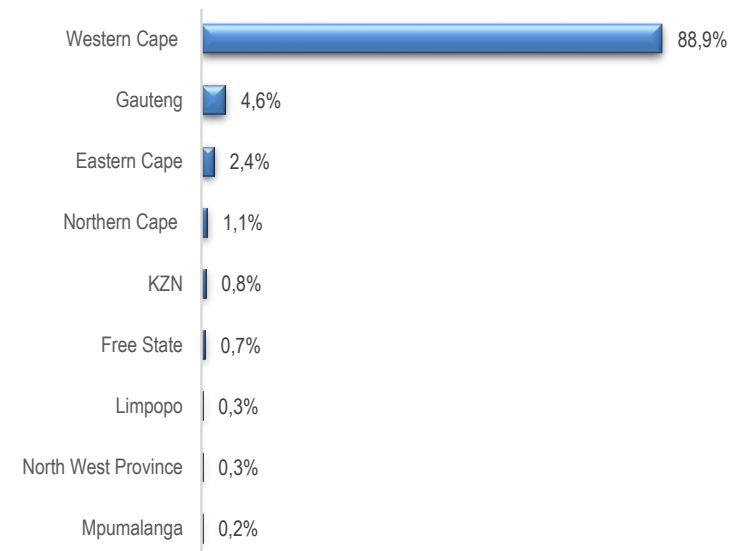
% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO THE CAPE OVERBERG, 2021



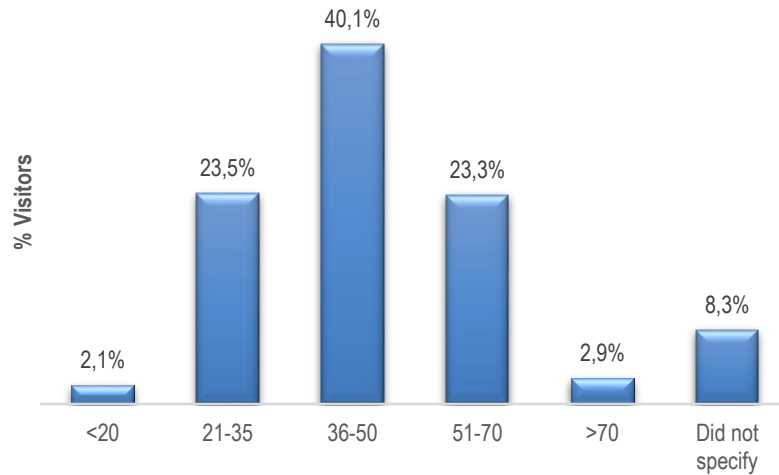
TOP INTERNATIONAL VISITORS TO THE CAPE OVERBERG, 2021



% SHARE OF DOMESTIC VISITORS TO THE CAPE OVERBERG, 2021

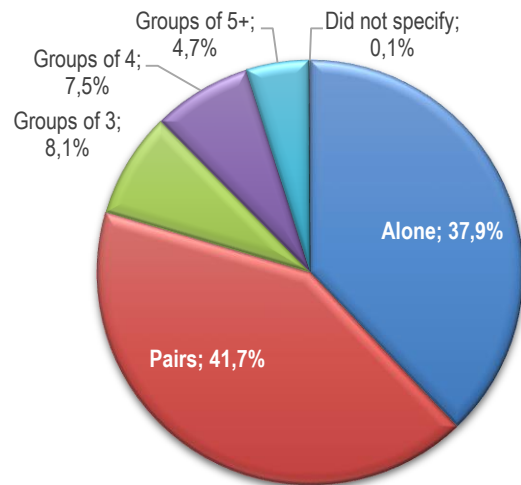


## 4.2 Age profile of visitors

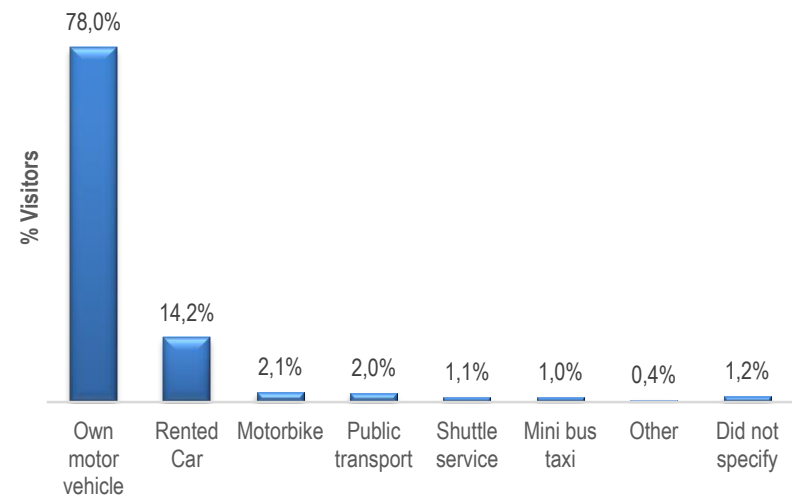


- The Overberg is a region that stretches along coasts with beautiful beaches, and over mountain ranges with interesting geological formations, abundant birdlife and fynbos, making it an all-round destination for all ages.
- From January to December 2021, the leading age group was between 36 and 50 years (40,1%). A further 23,5% of respondents were between the ages of 21 and 35 years and 23,3% were between the ages of 51 and 70 years.
- More than two fifths of respondents travelled in pairs (41,7%) and a further 37,9% travelled alone.
- The vast majority of respondents travelled to the region with their own vehicle (78%) or via rented car (14,2%).

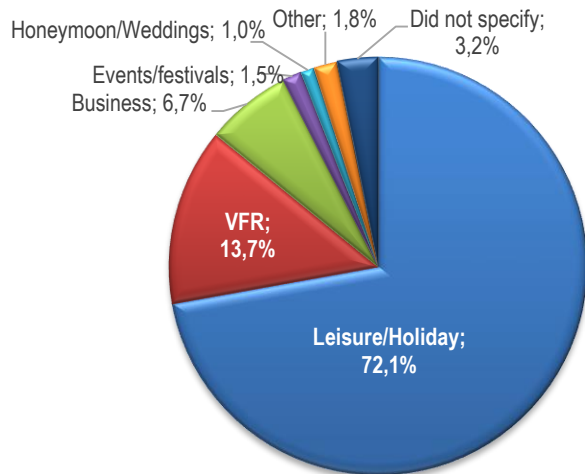
## 4.3 Group size



## 4.4 Mode of transport



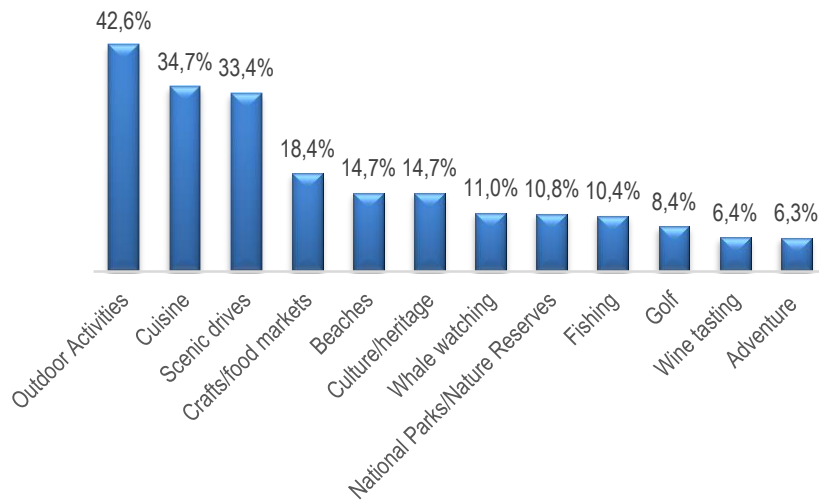
## 4.5 Purpose of visit



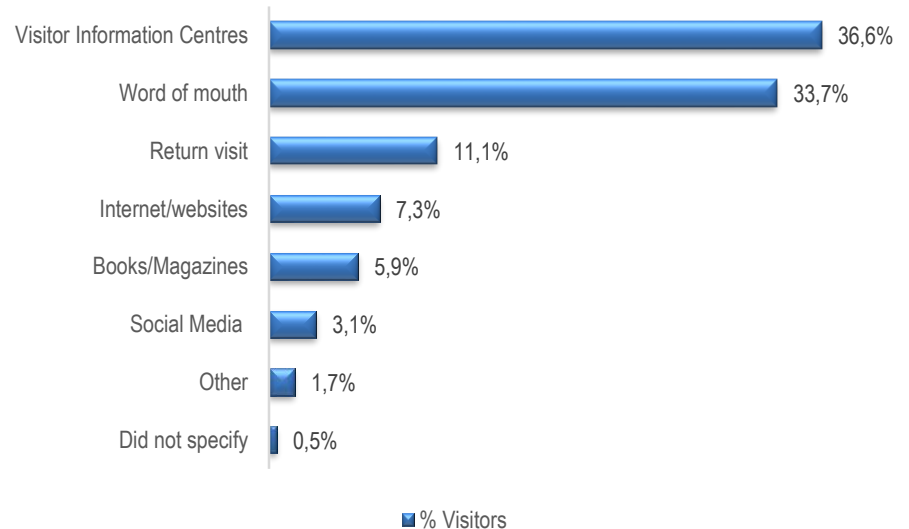
\*Other: Includes travel for medical/health (spa, surgery, wellness), education, sport, religion, and seasonal/migrant work

- The most prominent motivating factor for travel to the Cape Overberg was for the purpose of holiday/leisure (72,1%).
- Visiting Friends and Family (VFR) (13,7%) and Business (6,7%) ranked as part of the top three reasons for visiting the Cape Overberg region.
- Outdoor activities (42,6%), cuisine (34,7%) and scenic drives (33,4%) were the top three activities undertaken in the region.
- Activities under the 'other' category included business, birding, cruises, shopping, health & wellness, events, cycling, expos/exhibitions, flowers, sporting events-participator, shark cage diving, game reserves and gambling.
- Visitor Information Centres (36,6%), word of mouth (33,7%), and return visit (11,1%) were the top 3 sources used by visitors to gather information about the region.

## 4.6 Top Activities Undertaken in the Cape Overberg



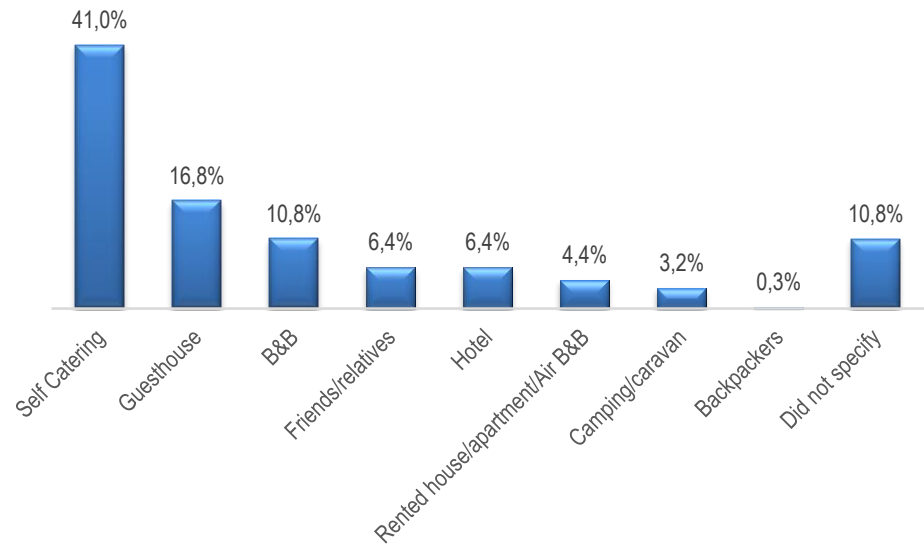
## 4.7 Top information sources



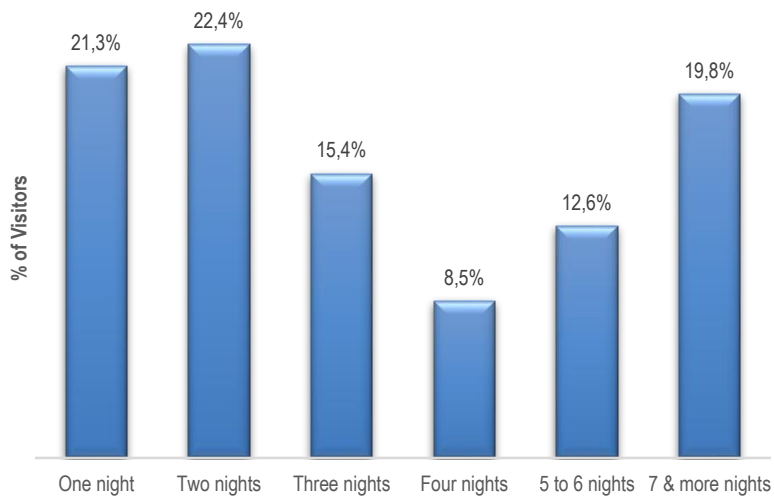
#### 4.8 Overnight stay



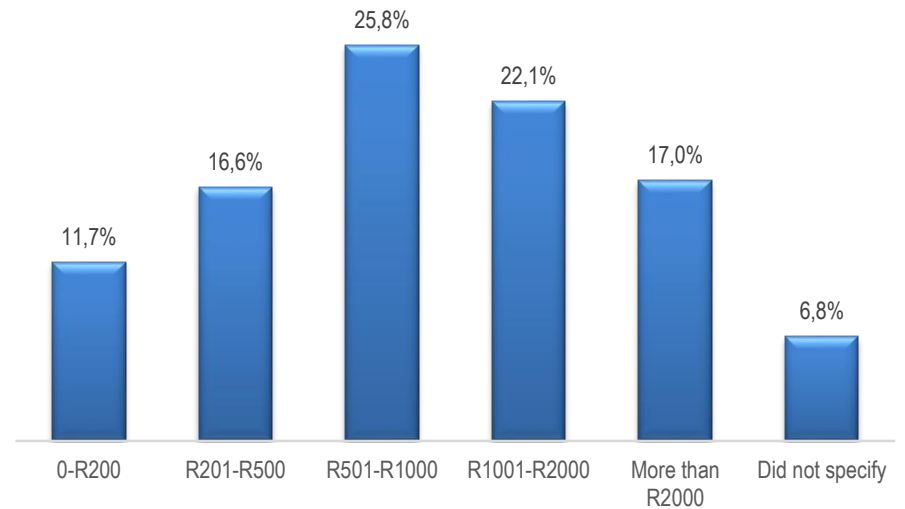
#### 4.10 Accommodation Usage



#### 4.9 Average Length of Stay



#### 4.11 Average Daily Spend

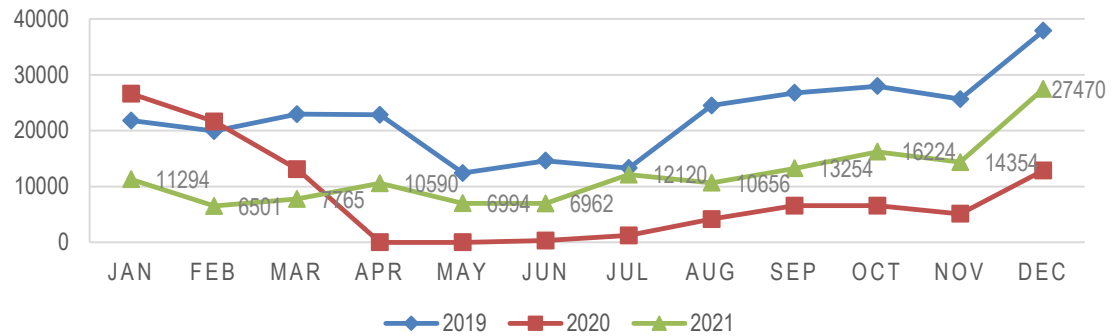




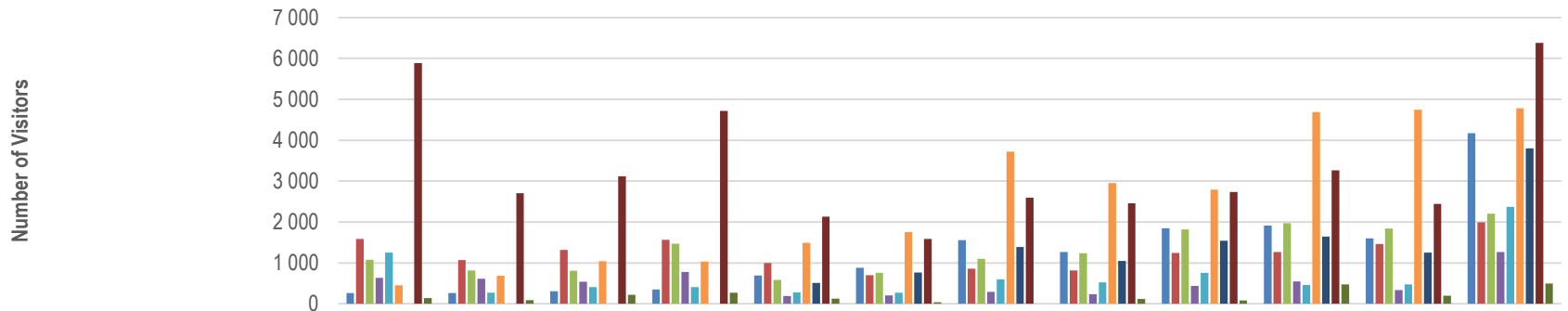
## 5. Performance of Cape Overberg Attractions

- The participating Cape Overberg attractions recorded a combined total of 144 184 visitors between January and December 2021, with a 53% recovery rate compared to the same period in 2019.
- Visitor numbers were highest in October, November and December, which coincides with the festive season holiday period.
- 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 already exceeded their 2019 figures in some months.

TOTAL NUMBER OF VISITORS TO THE CAPE OVERBERG ATTRACTIONS, JAN-DEC 2019-2021



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



	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21
■ Agulhas National Park	264	264	305	349	689	881	1 556	1 269	1 847	1 913	1 602	4 174
■ Bontebok National Park	1 589	1 069	1 318	1 563	998	699	861	814	1 247	1 263	1 463	1 993
■ De Hoop Nature Reserve	1 078	815	810	1 468	582	760	1 100	1 237	1 819	1 971	1 843	2 201
■ De Mond Nature Reserve	637	611	540	781	188	205	290	236	439	549	334	1 264
■ Kogelberg Nature Reserve	1 248	268	412	412	277	272	600	526	756	459	471	2 370
■ Stony Point Nature Reserve	451	682	1 044	1 031	1 491	1 751	3 724	2 950	2 789	4 690	4 747	4 784
■ Cape Agulhas Lighthouse	0	0	0	0	513	766	1 390	1 045	1 545	1 643	1 255	3 804
■ Harold Porter National Botanical Garden	5 889	2 701	3 117	4 714	2 130	1 588	2 599	2 460	2 732	3 263	2 442	6 381
■ Shipwreck Museum	138	91	219	272	126	40	0	119	80	473	197	499

## 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	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21
Cape Agulhas Lighthouse	0%	0%	0%	0%	42%	36%	74%	44%	50%	57%	48%	63%
Agulhas National Park	7%	8%	8%	12%	47%	37%	72%	44%	44%	52%	51%	64%
Bontebok National Park	84%	59%	66%	106%	76%	53%	88%	59%	39%	61%	80%	63%
De Hoop Nature Reserve	59%	55%	47%	106%	113%	172%	138%	46%	81%	69%	54%	93%
De Mond Nature Reserve	51%	101%	52%	167%	66%	56%	136%	70%	106%	166%	70%	91%
Harold Porter National Botanical Gardens	200%	97%	85%	75%	82%	63%	145%	86%	67%	92%	76%	82%
Kogelberg Nature Reserve	379%	101%	75%	38%	80%	81%	207%	111%	121%	102%	111%	142%
Stony Point	8%	10%	18%	17%	0%	0%	79%	27%	35%	41%	47%	59%
Shipwreck Museum	20%	13%	30%	57%	20%	4%	0%	31%	9%	54%	52%	57%

## 6. Cape Overberg Towns

OVERVIEW OF CAPE OVERBERG TOWNS VISITOR TRENDS AND PATTERNS, JAN – DEC 2021		
TOURISM INDICATOR	Stanford	Hangklip Kleinmond
% Share overseas	2,2%	2,1%
% Share domestic	97,8%	97,9%
% Share of overnight visitors	28,6%	45,5%
% Share of day visitors	42,6%	30,3%
Top domestic markets	Western Cape (97,4%)	Western Cape (90,5%)
	Gauteng (0,3%)	Gauteng (5,4%)
Main purpose of visit	Leisure/holiday (84,4%)	Leisure/holiday (56,1%)
	Business (5,5%)	VFR (29,4%)
Age profile of visitors	36-50 (50,8%)	21-35 (38,8%)
	51-70 (26,6%)	36-50 (38,1%)
Most common travel group size	Alone (44,4%)	Alone (50,8%)
	Pairs (43,3%)	Pairs (37,2%)
Most common length of stay	One night (34,1%)	One night (22,2%)
	Two nights (26,8%)	7+ nights (30,2%)
Most common mode of transport	Own motor vehicle (94,4%)	Own motor vehicle (61,8%)
	Rented car (2,4%)	Rented car (23,8%)
Top information source	VIC (65%)	Word of mouth (45%)
	Word of mouth (30,4%)	VIC (27,7%)
Average daily spend	R0-R200 (30,6%)	R1001-R2000 (32,1%)
Type of accommodation (overnight visitors)	Self-Catering (43,7%)	Self-Catering (57,4%)
	B&B (6,5%)	Guesthouse (18,2%)

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
- SANParks

*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.*