



Overberg Tourism Visitor Trends

January - December 2022

Contents

1. Executive Summary
2. Methodology and Sample Size
3. Overberg Attractions
4. Overberg Visitor Trends & Patterns
 - 4.1. Origin of visitors
 - 4.2. Age profile of visitors
 - 4.3. Travel group size
 - 4.4. Main purpose of visit
 - 4.5. Mode of transport
 - 4.6. Top information sources
 - 4.7. Main activities undertaken in the Overberg
 - 4.8. Overnight stay
 - 4.9. Average length of stay
 - 4.10. Accommodation usage
 - 4.11. Average daily spend
5. Acknowledgements

1. Executive Summary

- The attractions highlighted in this report includes the renowned Harold Porter National Botanical Gardens, Stony Point, Agulhas National Park, Bontebok National Park, Cape Agulhas Lighthouse, De Hoop Nature Reserve, De Mond Nature Reserve, Kogelberg Nature Reserve and the Shipwreck Museum. Collectively, these attractions welcomed a total of **204 981 visitors between January and December 2022**.
- The attractions mentioned above portrayed strong resilience and recovered very well when compared to 2019. The highest recovery was recorded at **Kogelberg Nature Reserve (167,2%)**, followed by **De Hoop Nature Reserve (107,5%)** and **Harold Porter National Botanical Garden (105,1%)**.
- The period highlighted in this report (Jan - Dec 2022) indicates that the largest proportion of travellers to the Overberg originated from the **domestic market (78,5%)**, in particular from within the **Western Cape (89,2%)**.
- The **overseas market accounted for 21,5%** of visitors over the period, led by **Germany, United Kingdom, and France**.
- More than three quarters of visitors travelled to the Overberg for **holiday** and **13,3% for visiting friends and relatives (VFR)**. **Gourmet Restaurants/Cuisine** ranked as the top tourism activity enjoyed in the region, followed by **crafts/food markets, scenic drives, outdoor activities** and **cultural/heritage**. **Own motor vehicles** were the preferred mode of transport over the period.
- Visitors spent on average **R1001-R2000 (32,2%)** per day in the region and a further **23,3% of visitors spent more than R2000 per day**.
- **38,7% of visitors took day trips** to the Overberg and **overnight stays accounted for 61,3%**. Amongst the visitors who indicated **overnight stays**, the largest share spent **7 or more nights (35,0%)** and **self-catering was the preferred accommodation**.
- The age groups **36-50 and 51-70 years** ranked as the most prominent and the largest proportion of respondents travelled to the region in pairs or on their own.
- Key information sources that played a major role in drawing visitors to the region and attractions were **visitor information centres (41,0%)** and **word of mouth (26,6%)**.

2. Methodology and Sample Size

This report provides an overview of the tourism trends and patterns in the Overberg region. 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.*

Between January to December 2022, a total of **4 472** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Overberg. The participating Tourism Offices were:

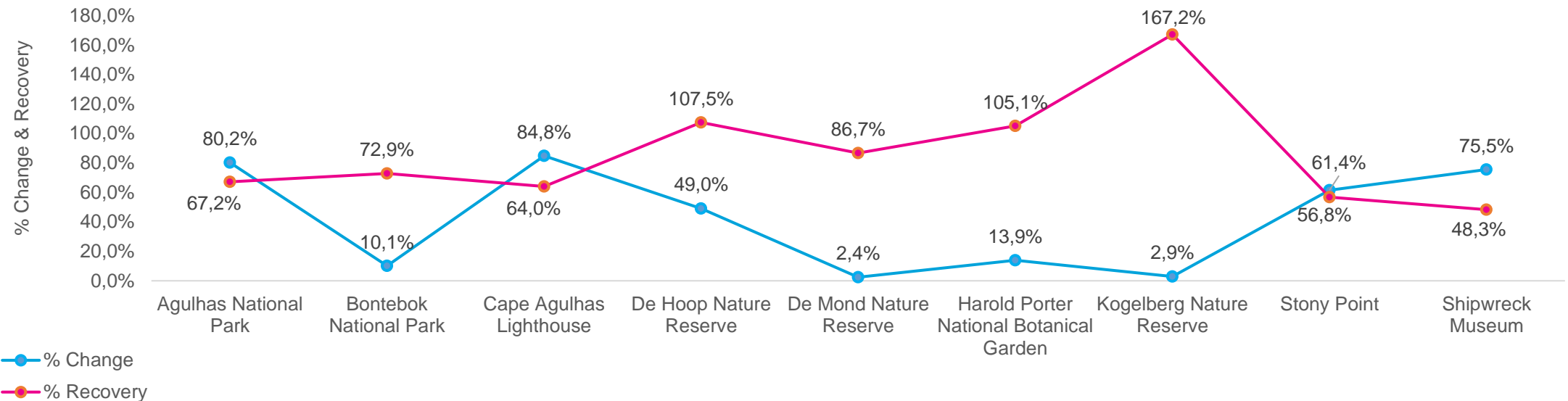
Gansbaai	263
Hangklip Kleinmond	1932
Hermanus	1393
Stanford	884



3. Overberg Attractions

- The **9 participating Overberg attractions** recorded a **combined total 204 981 visitors in 2022**, with a **75,7% recovery rate** when compared to 2019.
- The following **top 3 outdoor attractions** were particularly popular and **exceeded their 2019 visitor levels in 2022**.
 1. Kogelberg Nature Reserve – Recorded 11 469 visitors in 2022, with the **highest recovery rate of 167,2% compared to 2019** and **2,9% growth** in comparison to 2021.
 2. De Hoop Nature Reserve – Received 23 377 visitors in 2022, reaching **107,5% recovery rate** compared to 2019 and **49,0% growth** compared to 2021.
 3. Harold Porter National Botanical Garden – Received a total of 45 592 visitors in 2022, with a **recovery rate of 105,1%** when compared to 2019 and **13,9% visitor growth** in comparison to 2021.

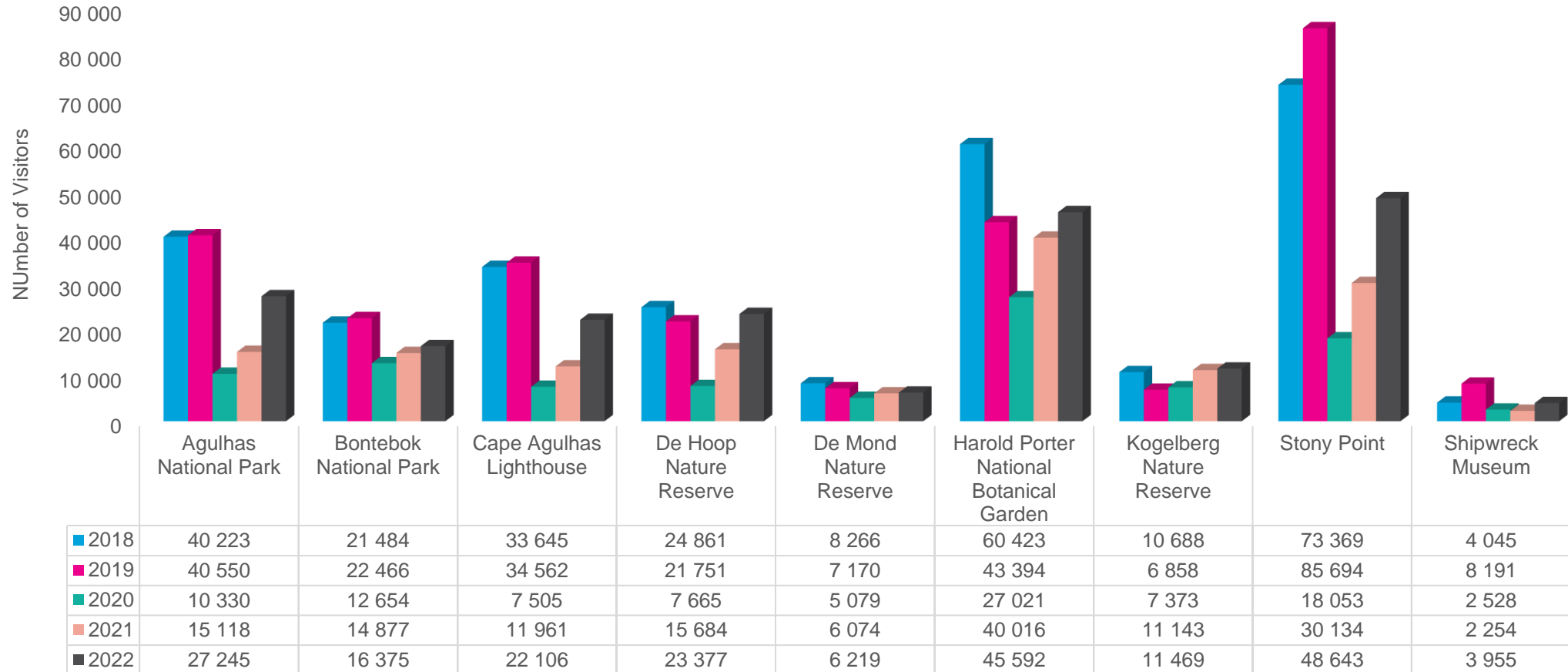
% GROWTH AND RECOVERY IN THE OVERBERG ATTRACTIONS, 2022 vs. 2019



Sources: SANParks, L'Agulhas and Hangklip/Kleinmond Tourism Offices, 2023

3. Overberg Attractions

TOTAL NUMBER OF VISITORS TO THE OVERBERG ATTRACTIONS, 2018 - 2022



Sources: SANParks, L'Agulhas and Hangklip/Kleinmond Tourism Offices, 2023



Overberg Visitor Trends & Patterns

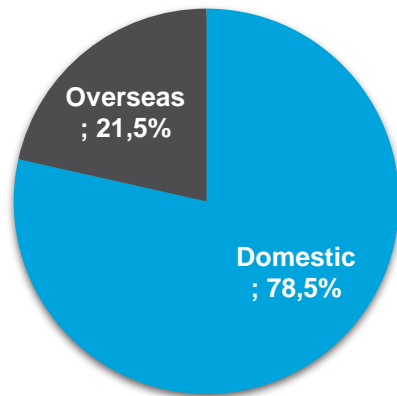
Wesgro Primary Research: Regional Visitor Tracking Surveys

4. Overberg Visitor Trends & Patterns

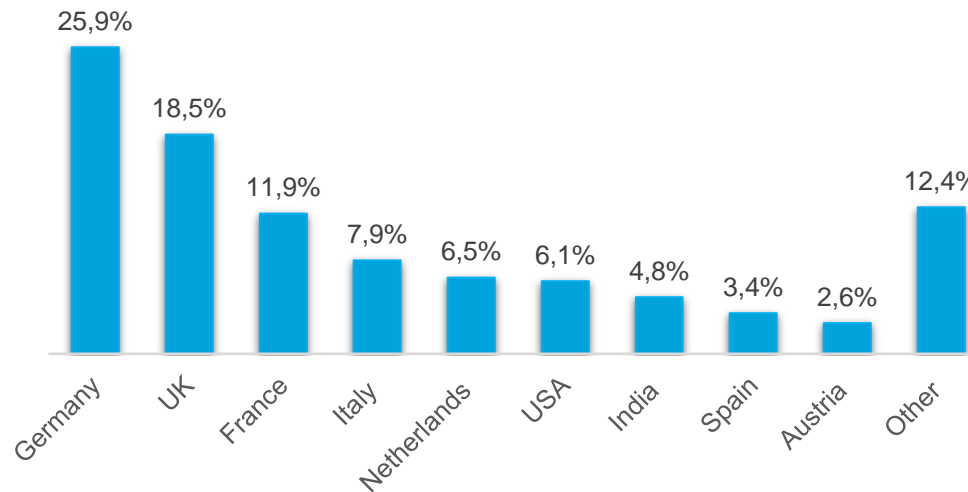
4.1 Origin of Visitors

- The **domestic market accounted for the largest** (78,5%) share of respondents recorded between January and December 2022 and the **overseas market made up 21,5%**.
- Most of the international travellers to the Cape Overberg originated from **Germany**. The **UK** (18,5%) and **France** (11,9%) followed as the second and third top markets to the region.
- The **largest share of domestic travellers** to the region originated from within the **Western Cape** (89,2%), confirming that the Overberg is a popular tourism destination among locals. Gauteng and KwaZulu-Natal ranked as the other leading source provinces to the region.

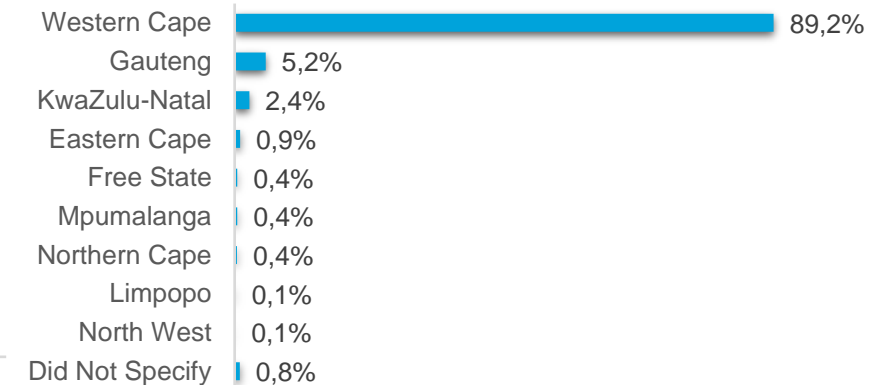
% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO THE OVERBERG, JAN - DEC 2022



TOP INTERNATIONAL VISITORS TO THE OVERBERG, JAN - DEC 2022

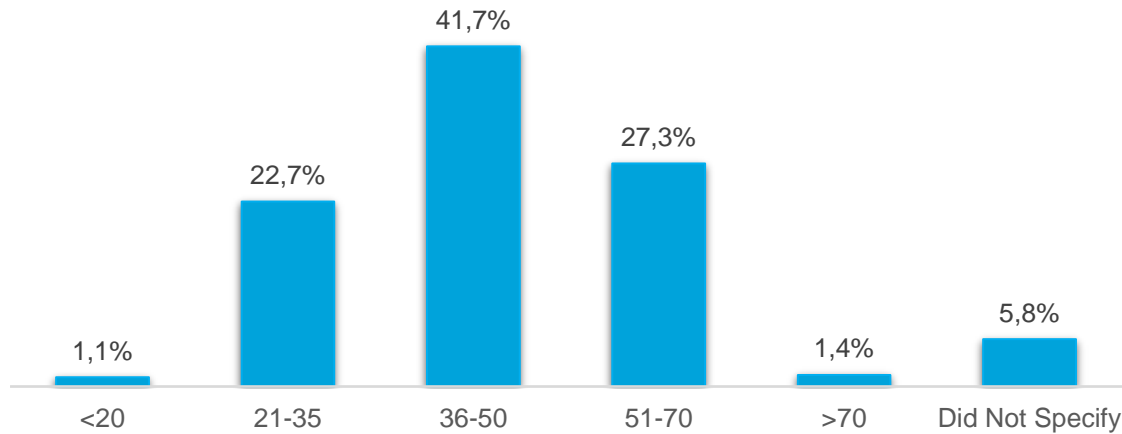


% SHARE OF DOMESTIC VISITORS TO THE OVERBERG, JAN - DEC 2022



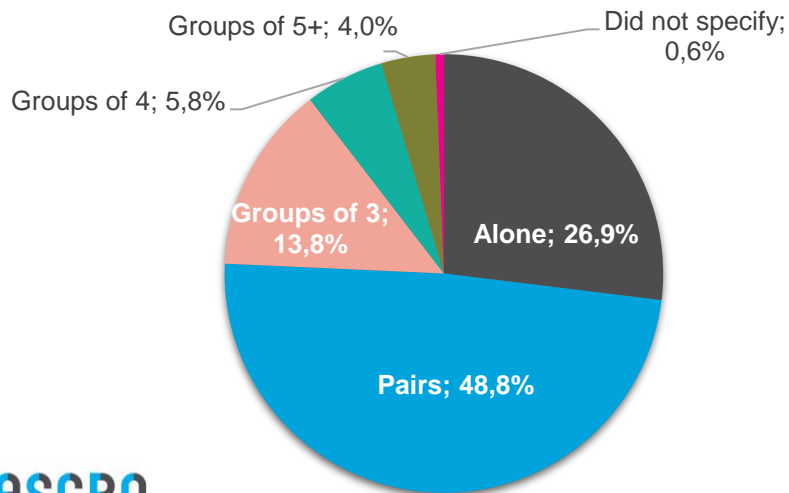
4. Overberg Visitor Trends & Patterns

4.2 Age Profile of Visitors

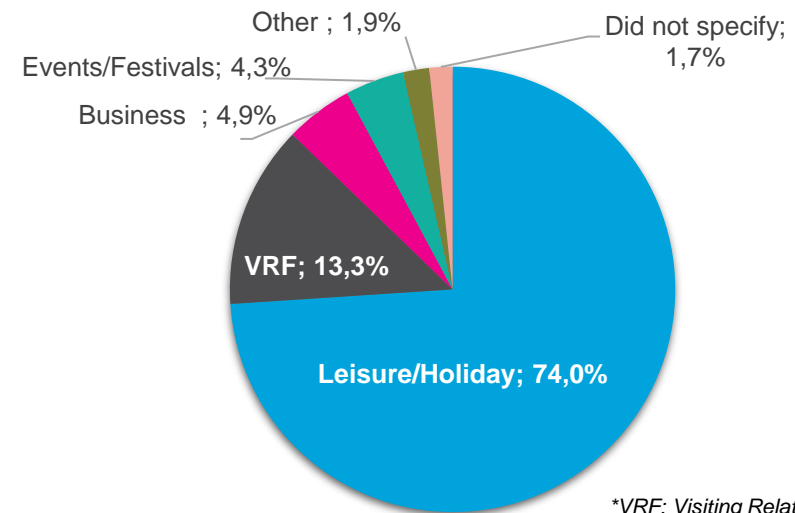


- The **age groups 36-50 and 51-70 years** ranked as the most popular amongst visitors to the Overberg.
- The largest proportion of respondents **travelled to the region in pairs or on their own**, followed by 13,8% who travelled in groups of three or more.
- More than three quarters of visitors travelled to the Overberg for **holiday and 13,3% for VFR**. Reasons for visiting the region in the 'other' category included medical/health/wellness, honeymoon/weddings, religion and sports.

4.3 Travel Group Size



4.4 Purpose of Visit

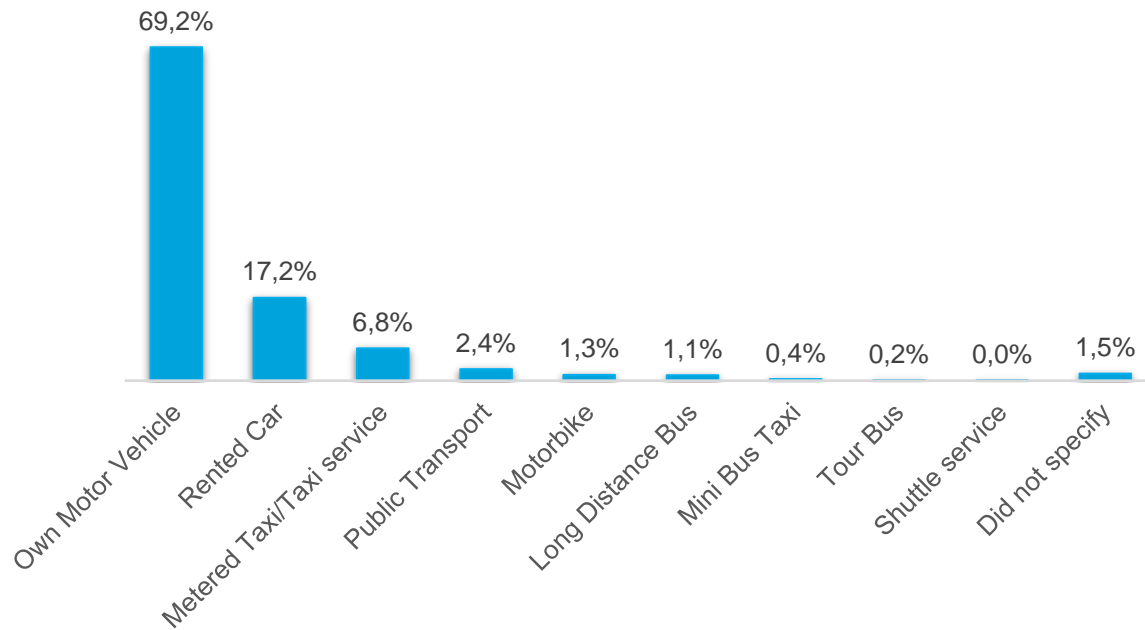


*VRF: Visiting Relatives and Friends

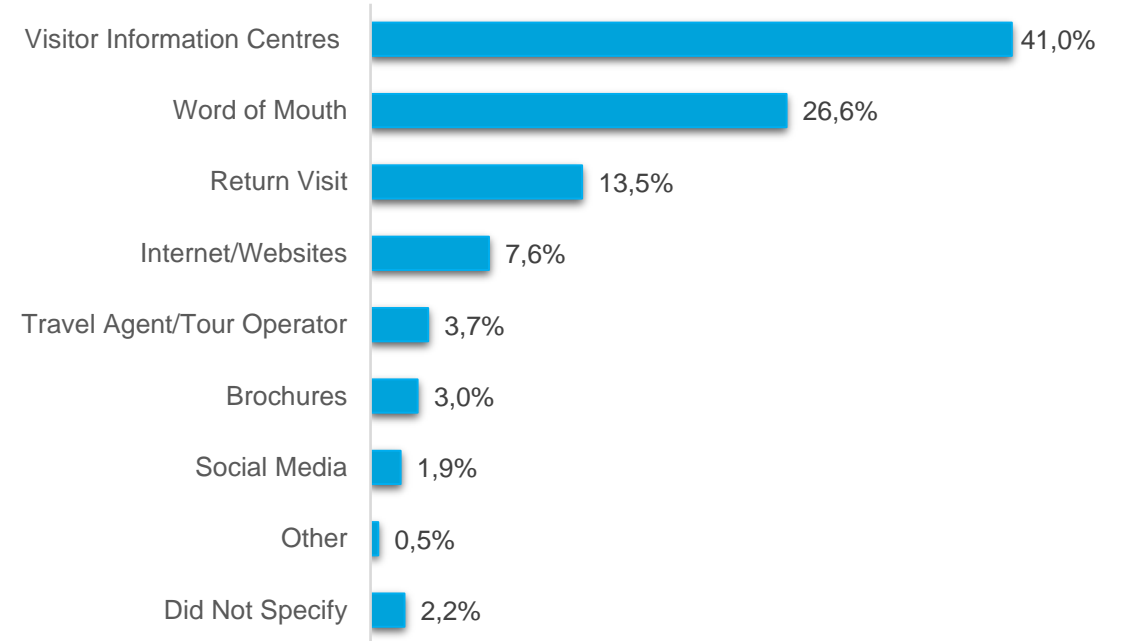
4. Overberg Visitor Trends & Patterns

- **Own motor vehicles (69,2%)** were the preferred mode of transport over the period, this is largely due to the dominant share of Western Cape residents to the region. Rented cars (17,2%) ranked as the second most popular type of transport
- **Visitor Information Centres (41,0%)**, **word of mouth (26,6%)**, and **return visits (13,5%)** were the top 3 sources used by visitors to gather information about the region and attractions. These information sources played a significant role in attracting more visitors to the region.

4.5 Mode of Transport



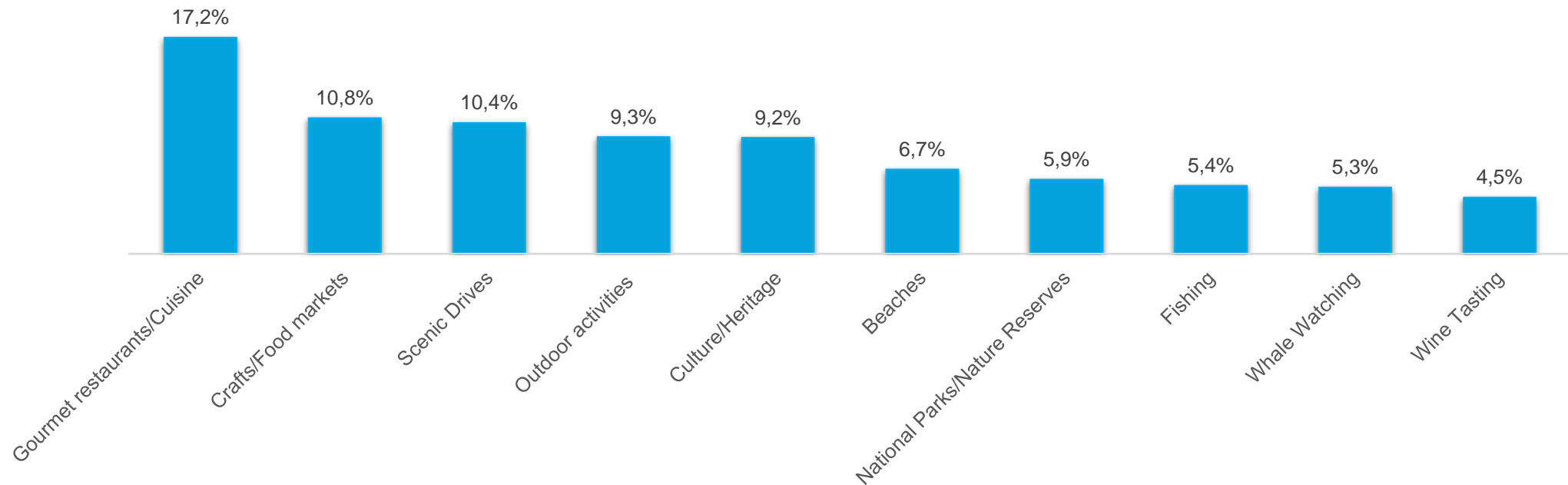
4.6 Top Information Sources



4. Overberg Visitor Trends & Patterns

- **Gourmet Restaurants/Cuisine** ranked as the top tourism activity enjoyed in the region, followed by crafts/food markets, scenic drives, outdoor activities and cultural/heritage.
- 38,7% of visitors took day trips to the Overberg and **overnight stays accounted for 61,3%**. A third of those who indicated overnight stays, **spent 7+ nights and self-catering** was the preferred type of accommodation.
- Close to a third of visitors to the Overberg **spent between R1001-R2000 per day** in the region, followed by 23,3% who indicated an average spend of more than R2000 per day.

4.7 Top Activities undertaken in the Overberg

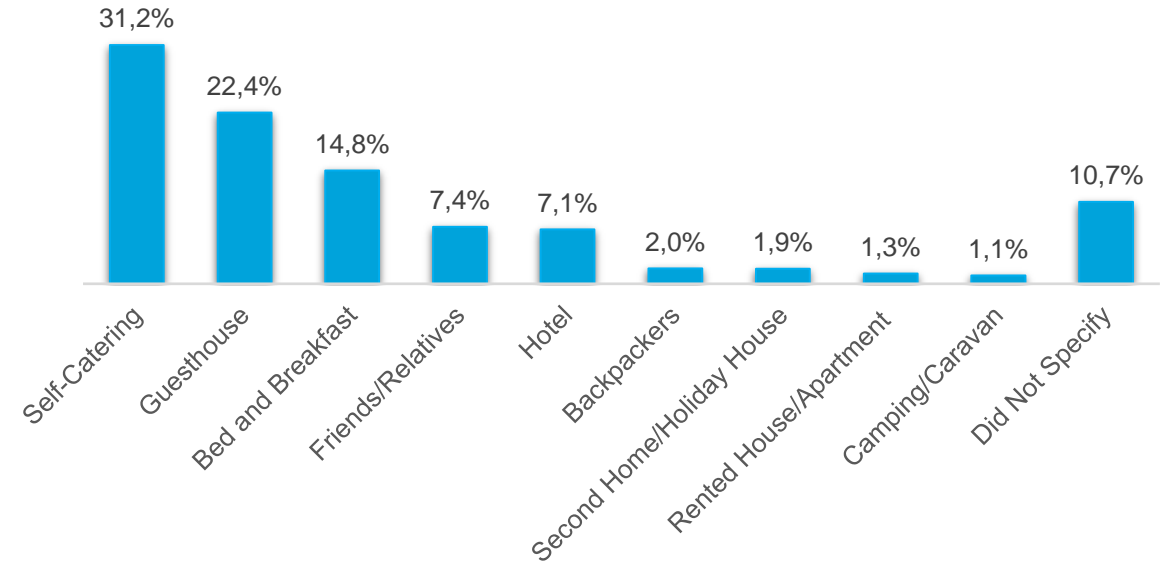


4. Overberg Visitor Trends & Patterns

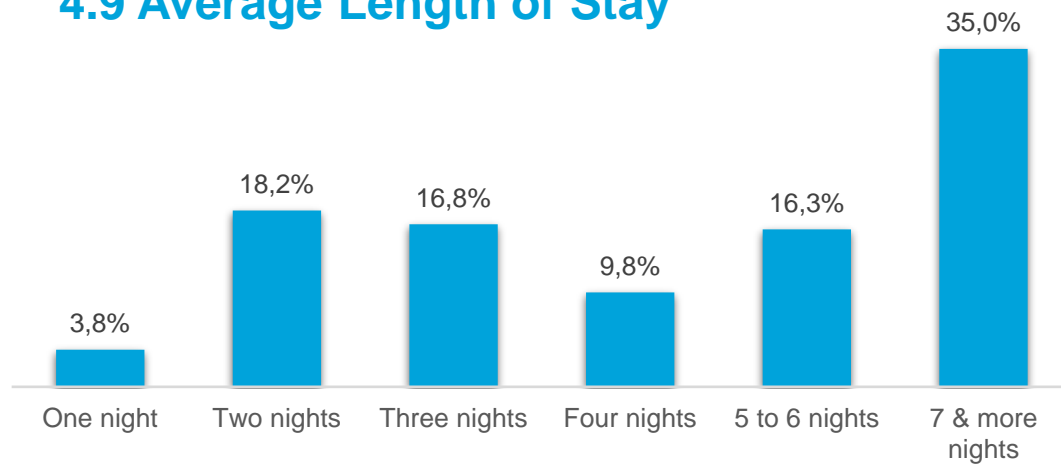
4.8 Overnight Stay



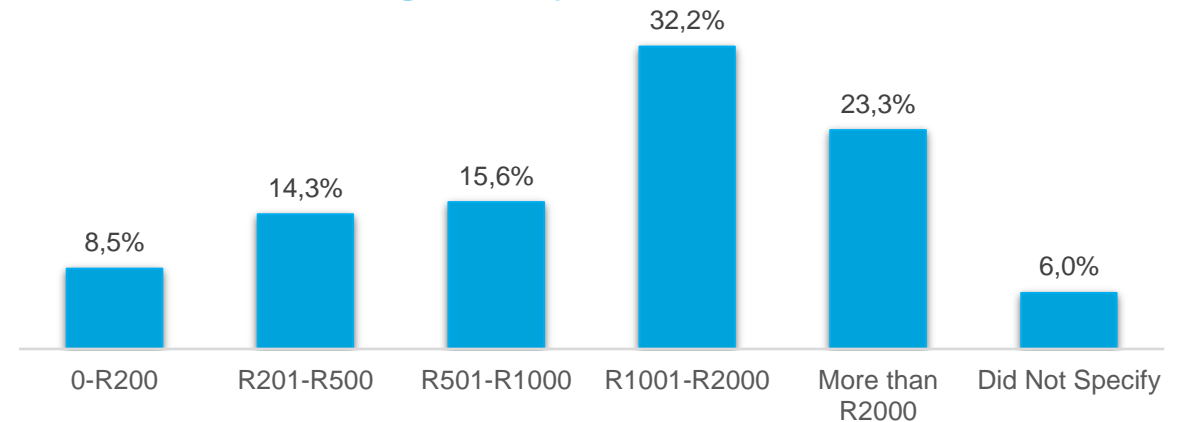
4.10 Accommodation Usage



4.9 Average Length of Stay



4.11 Average Daily Spend



5. Acknowledgements

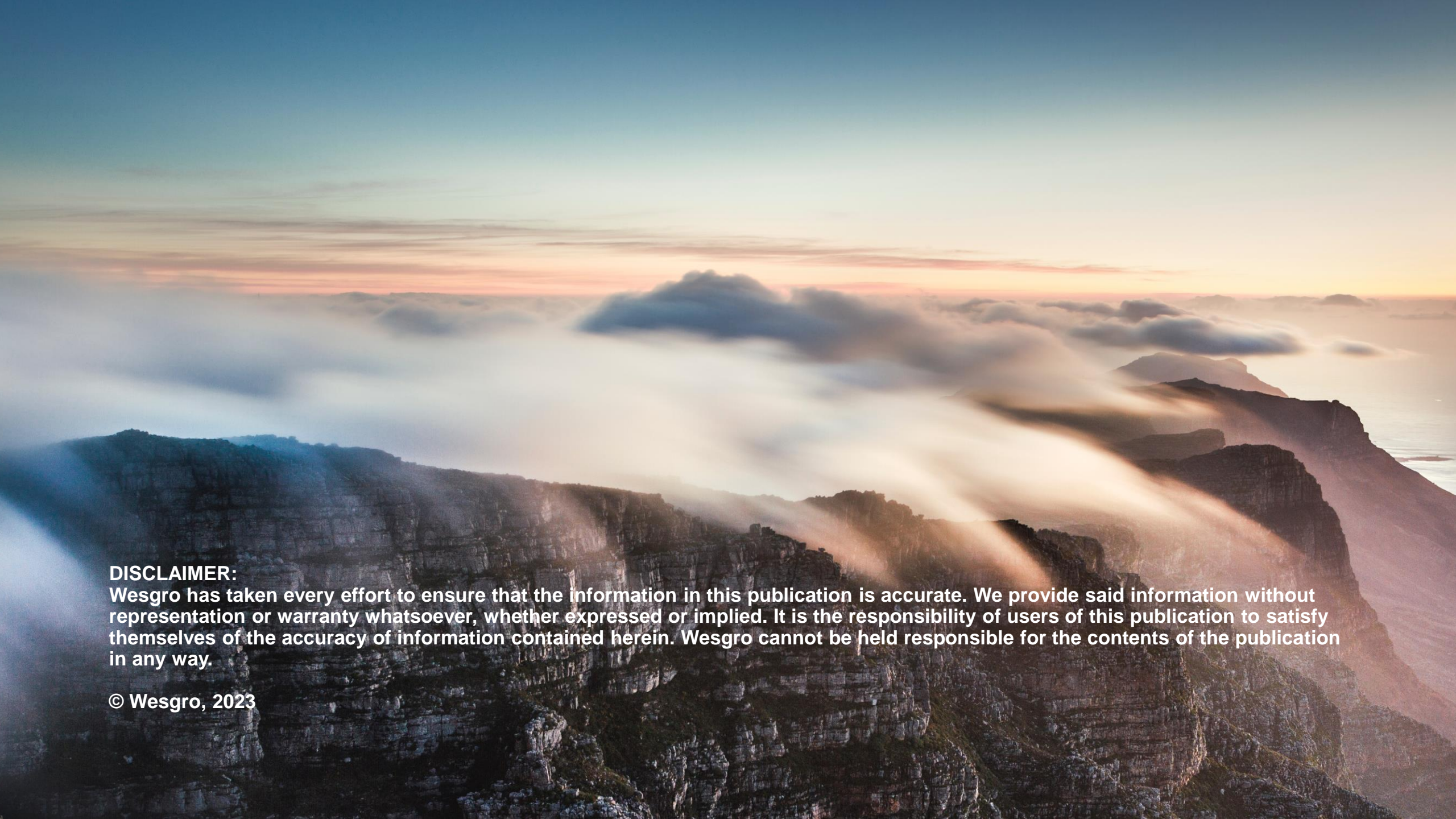
Acknowledgements and many thanks go to the Overberg District Municipality and the following tourism offices for supplying the data which made this publication possible and whose continued and unwavering support will sustain the forthcoming issues.

The participating local tourism offices in the Overberg:

Cape Agulhas
Gansbaai
Hangklip Kleinmond
Hermanus
Stanford

The participating attractions in the 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



DISCLAIMER:

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, 2023