



Overberg Tourism Visitor Trends

January-June 2022

Contents

1. Executive Summary
2. Methodology and Sample Size
3. Cape Overberg Attractions
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 information sources
 - 4.7. Main activities undertaken in the Cape 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 period highlighted in this report (Jan-Jun 2022) indicates that the largest proportion of travellers to the Cape Overberg originated from the domestic market (81,6%), in particular from within the Western Cape (88,3%).
- The overseas market accounted for 18,4% of visitors over the period, led by Germany, United Kingdom, and France.
- Three quarters of visitors travelled to the Cape Overberg for holiday and 11% for visiting friends and relatives (VFR). Cuisine ranked as the top tourism activity enjoyed in the region, followed by scenic drives, outdoor activities, crafts/food markets and beaches.
- 39% of visitors took day trips to the Cape Overberg and overnight stays accounted for 61%. A third of those who indicated overnight stays, spent 7 or more nights and self-catering was the preferred accommodation type for overnight visitors. 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.
- Visitors spent on average R1001-R2000 (32,1%) per day in the region and a further 20,3% of visitors spent more than R2000 per day.
- 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 Shipwreck Museum. These attractions collectively welcomed a total of 96 083 visitors between January and June 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 (215%), followed by recovery rates of over 100% at De Hoop Nature Reserve and Harold Porter National Botanical Garden.

2. Methodology and Sample Size

This report provides an overview of the tourism trends and patterns in the Cape 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 and June 2022**, a total of **1 523** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Cape Overberg. The participating Tourism Offices were:

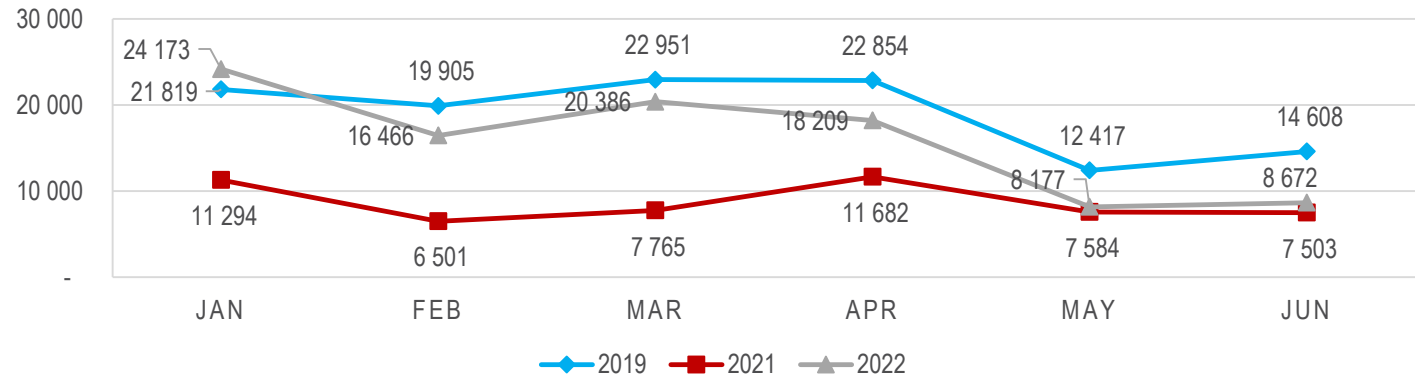
Gansbaai	143
Hangklip Kleinmond	456
Hermanus	462
Stanford	462



3. Cape Overberg Attractions

- The participating Cape Overberg attractions recorded a combined total of **96 083** visitors between January and June 2022, with a 84% recovery rate compared to the same period in 2019.
- Visitor numbers were highest in January 2022, exceeding its 2019 figure by 11%, followed by March, April and February. Footfall at attractions started slowing down in May and June which coincides with the province's winter period.
- Outdoor attractions like Harold Porter Botanical Gardens, De Hoop Nature Reserve, De Mond Nature Reserve, Kogelberg Nature Reserve, and Stony Point have been particularly popular having already exceeded their 2019 figures in some months.

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

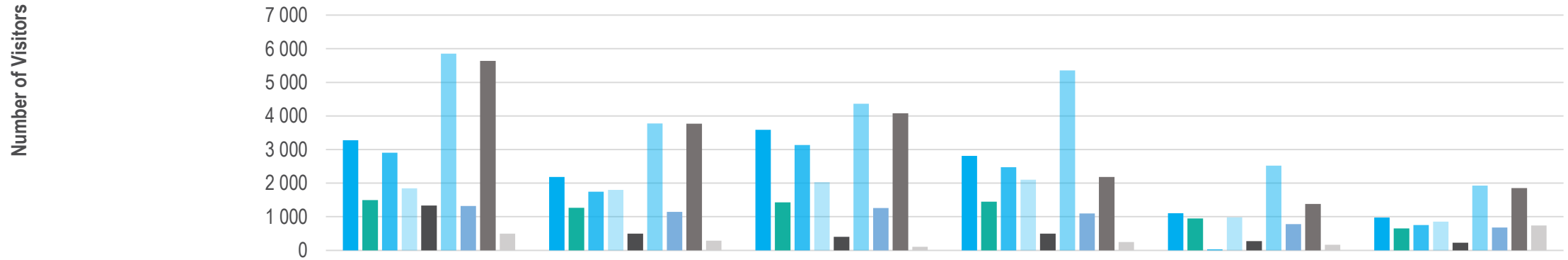


PARTICIPATING REGIONAL ATTRACTIONS - MONTHLY RECOVERY PERCENTAGE						
ATTRACTIONS	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22
Agulhas National Park	83%	70%	90%	93%	75%	41%
Bontebok National Park	79%	70%	71%	98%	72%	50%
Cape Agulhas Lighthouse	82%	67%	91%	95%	2%	35%
De Hoop Nature Reserve	101%	121%	117%	152%	190%	193%
De Mond Nature Reserve	107%	83%	39%	105%	95%	63%
Harold Porter National Botanical Garden	199%	136%	119%	85%	130%	76%
Kogelberg Nature Reserve	402%	431%	230%	100%	226%	202%
Stony Point	105%	58%	71%	36%	29%	47%
Shipwreck Museum	72%	41%	15%	52%	26%	68%

Sources: SANParks, L'Agulhas and Hangklip/Kleinmond Tourism Offices, 2022

3. Cape Overberg Attractions

TOTAL NUMBER OF VISITORS TO THE CAPE OVERBERG ATTRACTIONS, JAN - JUN 2022



	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22
■ Agulhas National Park	3 274	2 186	3 586	2 811	1 102	977
■ Bontebok National Park	1 496	1 269	1 425	1 447	947	655
■ Cape Agulhas Lighthouse	2908	1742	3135	2475	29	754
■ De Hoop Nature Reserve	1846	1796	2029	2100	982	855
■ De Mond Nature Reserve	1 335	500	402	494	272	229
■ Harold Porter National Botanical Garden	5 853	3 776	4 365	5 352	2 519	1 926
■ Kogelberg Nature Reserve	1 322	1 142	1 257	1 098	783	680
■ Stony Point	5 641	3 767	4 081	2 185	1 378	1 853
■ Shipwreck Museum	498	288	106	247	165	743

Sources: SANParks, L'Agulhas and Hangklip/Kleinmond Tourism Offices, 2022

Cape Overberg Visitor Trends & Patterns

Wesgro Primary Research: Regional Visitor Tracking Surveys

WESGRO

cape town & western cape
tourism, trade, investment, film

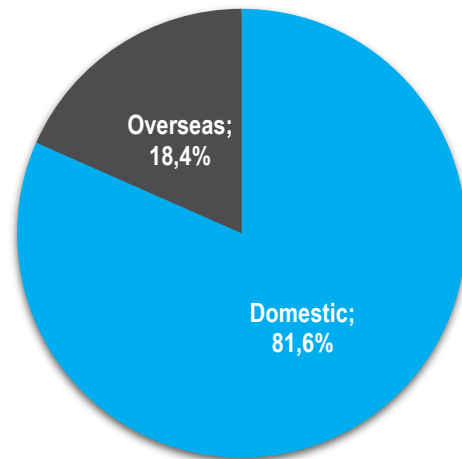
An Inspiring Place To Do Business

4. Cape Overberg Visitor Trends & Patterns

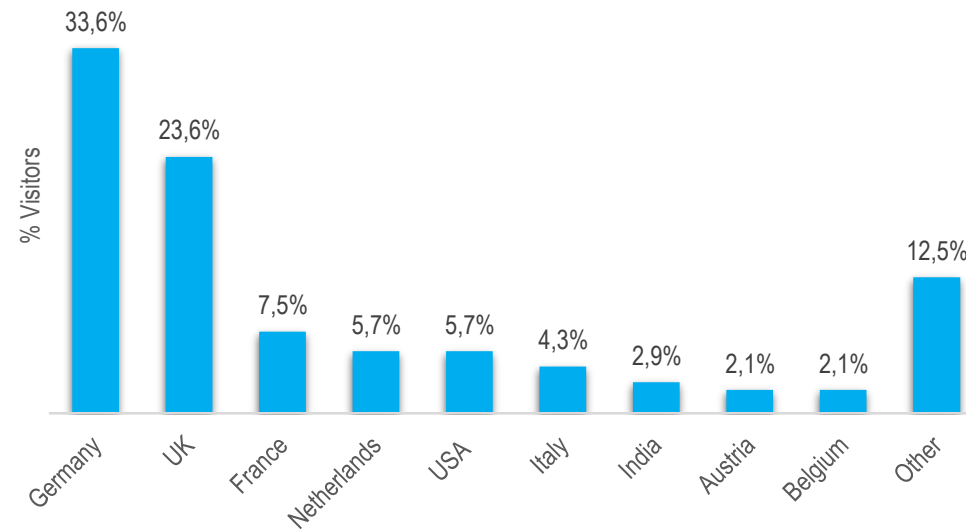
4.1 Origin of Visitors

- The domestic market accounted for the largest (81,6%) share of respondents recorded between January and June 2022 and the overseas market made up 18,4%.
- A third of international travellers to the Cape Overberg originated from Germany. The UK (23,6%) and France (7,5%) 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 (88,3%), confirming that the Cape Overberg is a popular tourism destination among locals. Gauteng and KwaZulu-Natal ranked as the other leading source provinces to the region.

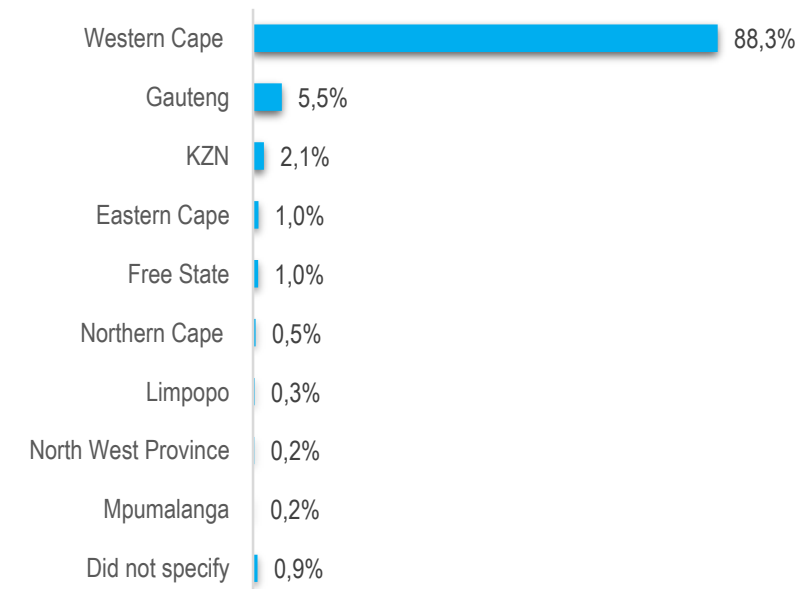
% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO THE CAPE OVERBERG, JAN - JUN 2022



TOP INTERNATIONAL VISITORS TO THE CAPE OVERBERG, JAN - JUN 2022

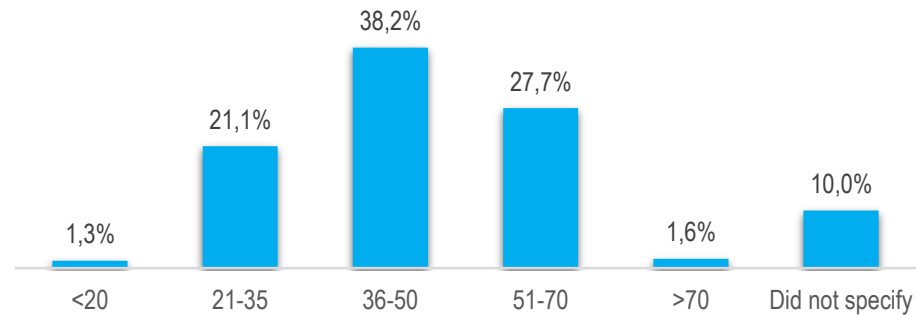


% SHARE OF DOMESTIC VISITORS TO THE CAPE OVERBERG, JAN - JUN 2022



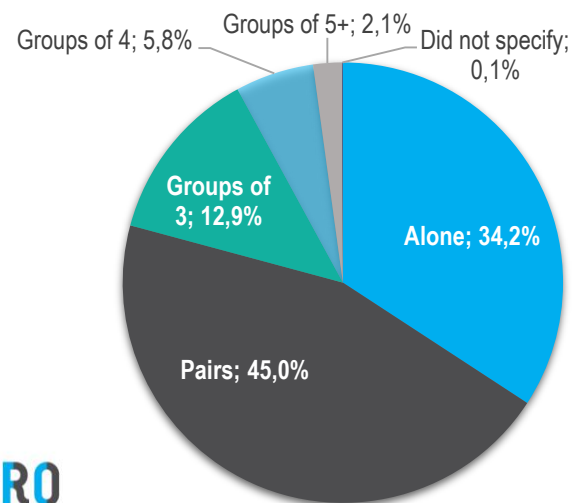
4. Cape Overberg Visitor Trends & Patterns

4.2 Age Profile of Visitors

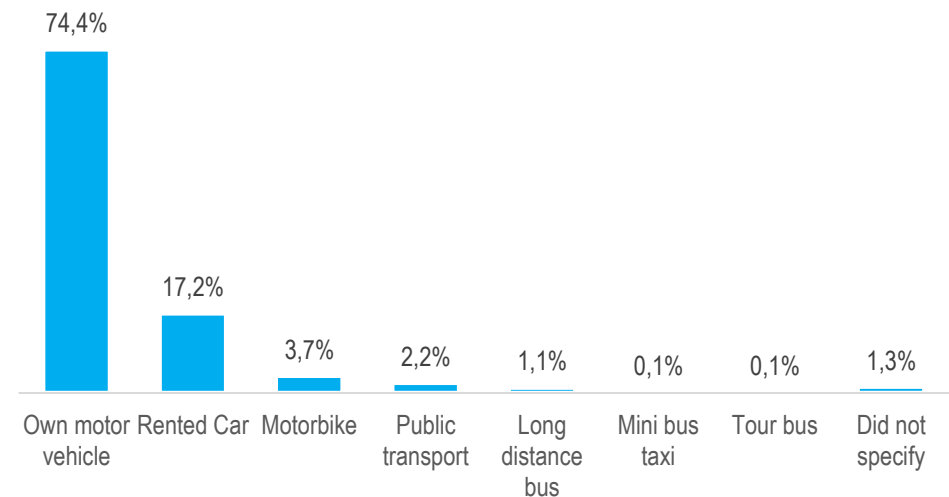


- The age groups 36-50 and 51-70 years ranked as the most popular amongst visitors to the Cape Overberg.
- Own motor vehicles (74,4%) were the preferred mode of transport over the period, this is largely due to the dominant share of Western Cape residents to the region. Rented cars (17,2%) ranked as the second most popular form of transport.
- The largest proportion of respondents travelled to the region in pairs or on their own, followed by 12,9% who travelled in groups of three or more.

4.3 Travel Group Size

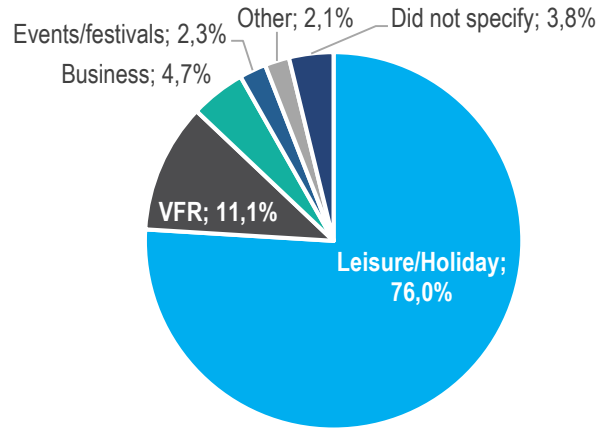


4.4 Mode of Transport



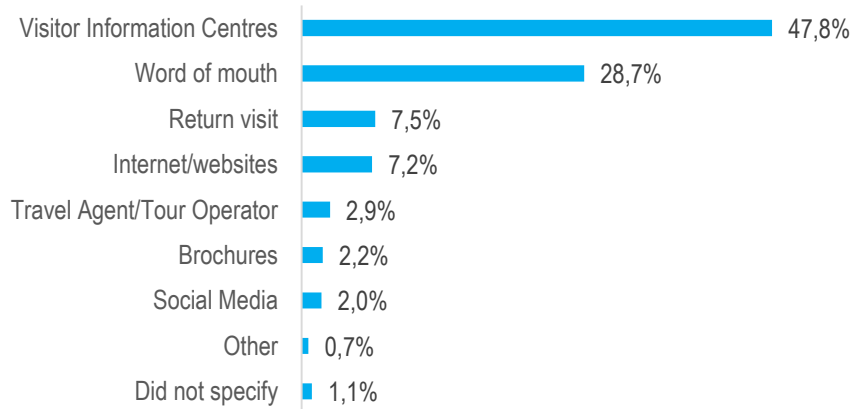
4. Cape Overberg Visitor Trends & Patterns

4.5 Purpose of Visit

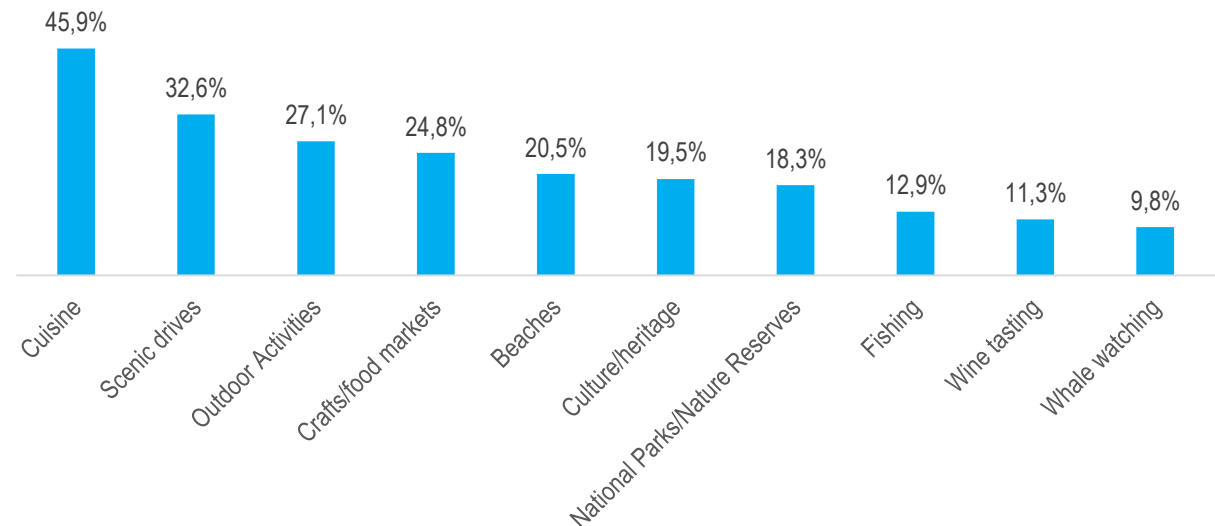


- More than three quarters of visitors travelled to the Cape Overberg for holiday and 11,1% for VFR. Reasons for visiting the region in the 'other' category included sport, honeymoon/weddings, education, medical/health/wellness, and religion.
- Visitor Information Centres (47,8%), word of mouth (28,7%), and return visit (7,5%) were the top 3 sources used by visitors to gather information about the region.
- Cuisine ranked as the top tourism activity enjoyed in the region, followed by scenic drives, outdoor activities, crafts/food markets and beaches.
- 39% of visitors took day trips to the Cape Overberg and overnight stays accounted for 61%. A third of those who indicated overnight stays, spent 7+ nights and self-catering was the preferred accommodation type among overnight visitors.
- Close to a third of visitors to the Cape Overberg spent between R1001-R2000 per day in the region, followed by 20,3% who indicated an average spend of more than R2000.

4.6 Top Information Sources

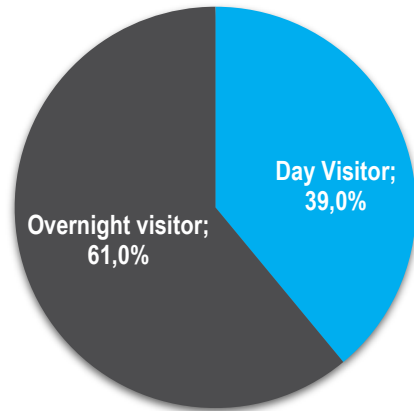


4.7 Top Activities undertaken in the Cape Overberg

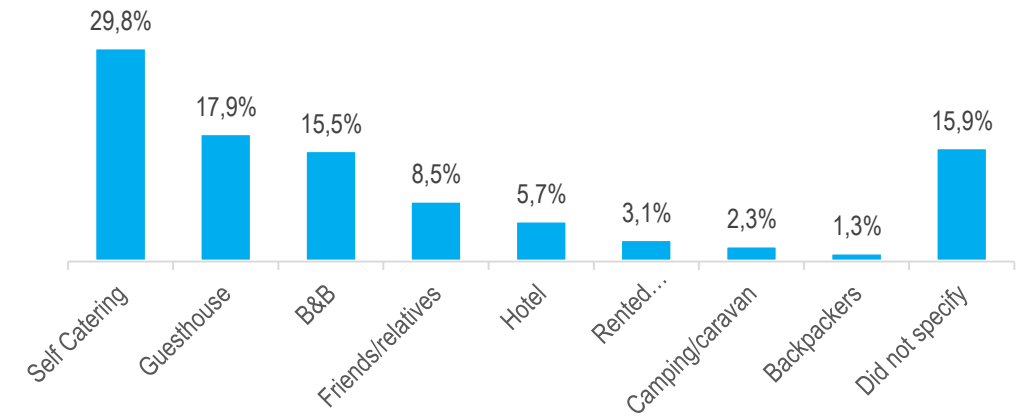


4. Cape Overberg Visitor Trends & Patterns

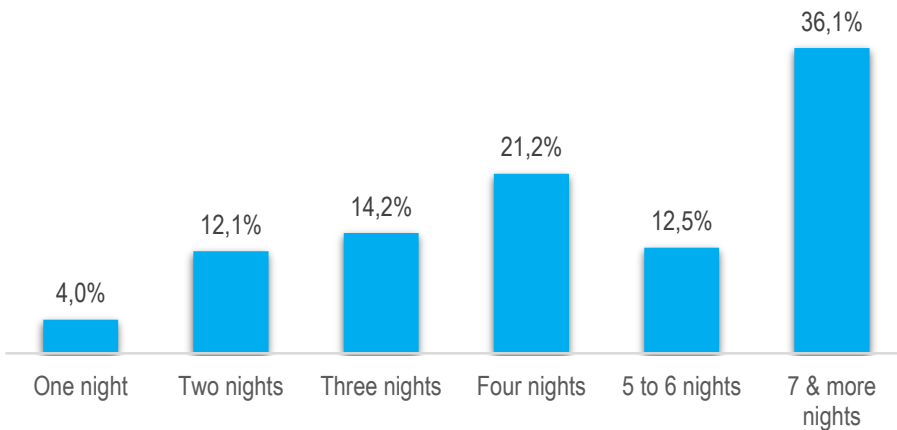
4.8 Overnight Stay



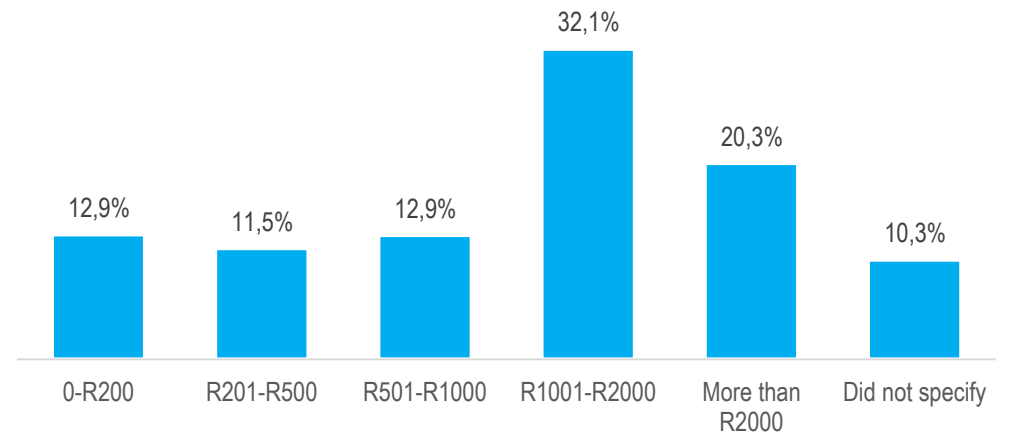
4.10 Accommodation Usage



4.9 Average Length of Stay



4.11 Average Daily Spend



5. Acknowledgements

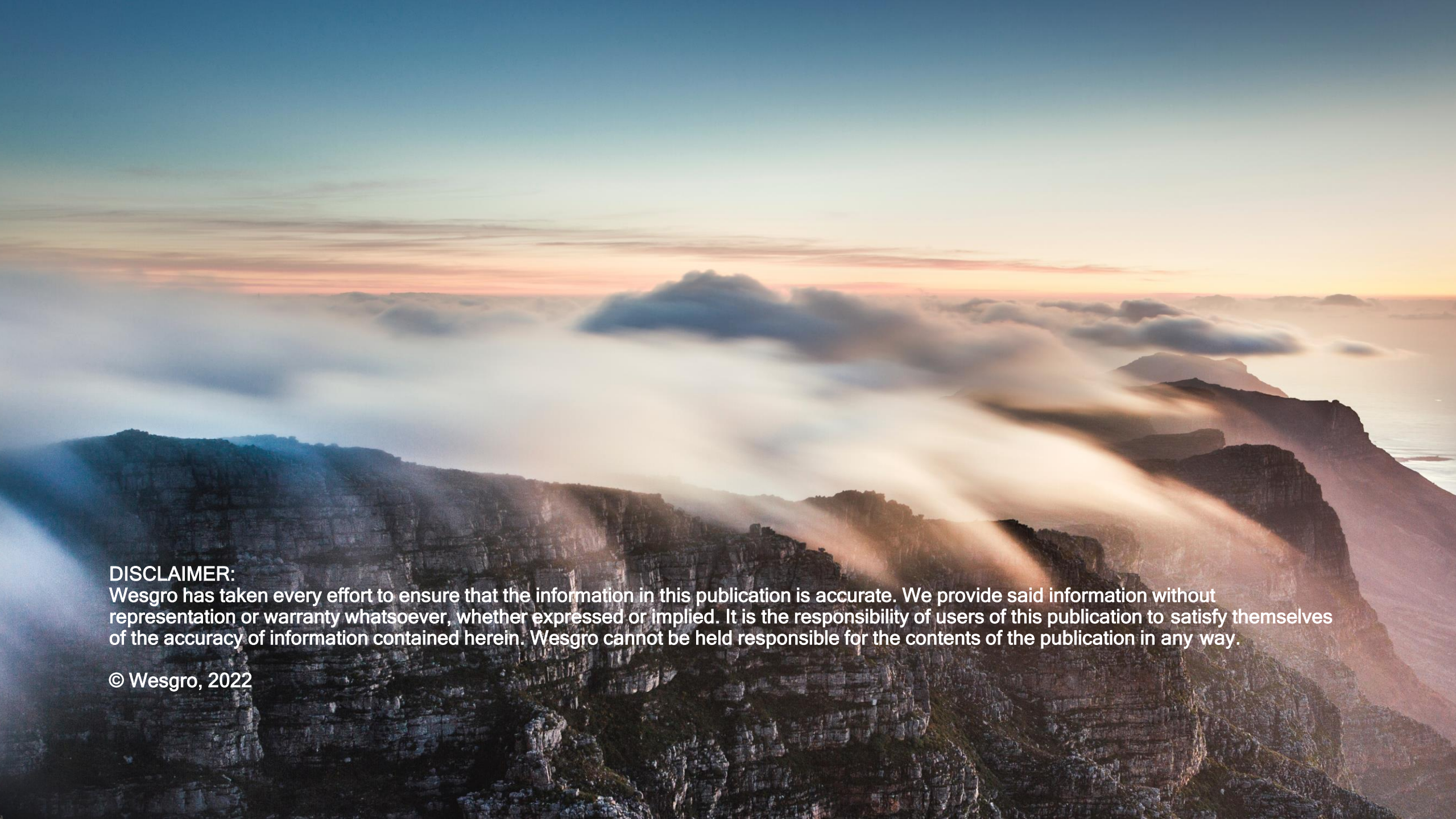
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The participating local tourism offices in the Cape Overberg:

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



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