

A photograph of the Overberg Lighthouse, a prominent red and white striped tower with a glass-enclosed lantern room at the top. The lighthouse is situated on a grassy hillside under a clear blue sky. A wooden boardwalk leads up to the base of the lighthouse. In the background, a white building with a dark roof is visible on the right side of the hill.

Overberg Tourism Visitor Trends

Annual 2023

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1. Executive summary

- The attractions included in this report are participating attractions which provide Wesgro with data. These attractions include Agulhas National Park, Harold Porter National Botanical Garden, Walker Bay Nature Reserve, Arniston Hotel & Spa, De Hoop Nature Reserve, Cape Agulhas Lighthouse, Bontebok National Park, Kogelberg Nature Reserve, Grootvadersbosch Nature Reserve, Marloth Nature Reserve, The Whale Trail, Panthera Africa, Shipwreck Museum, Grootvadersbosch Eco Venue, Stony Point Eco Venue, De Mond Nature Reserve, Elim Heritage Centre and Stony Point. Collectively, these attractions welcomed a total of 250,180 visitors between January and December 2023. This reflects an 82.7% recovery rate when compared to the same period in 2019 (Jan–Dec).
- Several of these attractions recovered fully for the period January to December 2023, in comparison to the same period in 2019. These attractions included the Whale Trail, Grootvadersbosch Nature Reserve, the Kogelberg Nature Reserve, Marloth Nature Reserve, the Walker Bay Nature Reserve and Panthera Africa.
- The tourism offices based in Cape Agulhas, Gansbaai, Hangklip Kleinmond, Hermanus, and Stanford welcomed an 86.0% share of domestic travellers of whom 79.7% came from the Western Cape.
- The overseas market accounted for 14.0% of visitors, led by Germany, the United Kingdom (UK), and France.
- Gen X, Millennials and Baby Boomers were the leading groups visiting the Overberg region, and the largest proportion of respondents travelled in pairs to the region, followed by solo travellers.
- 70.6% of visitors travelled to the Overberg for leisure/holiday and 17.2% to visit friends and family. Cuisine experiences were ranked as the top tourism activity enjoyed in the region, followed by scenic drives, outdoor activities, visits to crafts/food markets and visits to cultural or heritage sites.
- Overnight visitors accounted for close to 60% of visitors and 40% were day visitors. Most overnight visitors spent seven or more nights in the region and most overnight visitors preferred self-catering accommodation. Public transportation (used by 73.0% of visitors) was the most used mode of transportation, while 25.9% of visitors used rented cars.
- Some 35.3% of visitors spent on average R1001–R2000 per day in the region and a further 26.9% spent more than R2000 per day. Regarding accommodation expenditure, 18.2% of visitors spent between R2001 and R5000 during their stay in the region.

1. Executive summary, continued

- The Overberg region in the Western Cape is a popular tourist destination with a rich historical and cultural heritage that adds depth to visitors' experiences. This region is home to several towns, such as Swellendam and Stanford, which are known for their Cape Dutch architecture and roots dating back to the early 1700s. Apart from its historical significance, the Overberg region offers a range of activities that cater to different types of tourists. For instance, adrenaline junkies can engage in shark-cage diving in Gansbaai, while those seeking a more relaxed experience can enjoy the several Blue Flag beaches in the area (Western Cape Government, 2024). For tourism officers, Destination Marketing Organisations (DMOs), and other key stakeholders, this presents a unique opportunity for enhancing their marketing and promotion of the tourism experiences in the region. By crafting experiences and marketing messages that align with the values of the key markets attracted to the region, they can attract even more visitors and boost economic growth.
- The findings from January to December 2023 show that seven out of the top 10 source markets of visitors to the Overberg region were from Europe. According to Valuegraphics Global Value Guide, creativity is a top value among Europeans, and they recognise it as a key driver of innovation and growth. This emphasis on creativity can be seen in various aspects of European life, from the arts and culture to business and technology. Therefore, tourism offices, DMOs, and other key stakeholders should develop experiences and marketing messages that align with this value to attract more European visitors from Germany, the UK, France, the Netherlands, Italy, Austria and Switzerland.
- Similarly, visitors from the United States place a strong emphasis on health and well-being. They prioritise maintaining healthy eating and proper nutrition, engaging in regular physical activity, and focusing on mental wellness. The Western Cape has evolved into a destination that offers wellness and health tourism experiences, making it an ideal destination for US visitors seeking such experiences. There is therefore a need to promote experiences in the Overberg region that align with this value.
- Compassion is a deeply ingrained value in many Asian cultures, and it is considered one of the top 10 values. This is a quality that is highly respected and valued, and it plays a significant role in the daily lives of people in most Asian countries. To appeal to the Asian market, especially Indian visitors, the Overberg region needs to offer experiences that evoke compassion. This means providing activities and services/experiences that are not only enjoyable but that also promote kindness, empathy, and understanding. By doing so, more visitors from India and other countries such as Singapore, Japan, and Malaysia, which were among the 34 countries in the survey, will be more likely to choose the Overberg region as their preferred destination.

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.

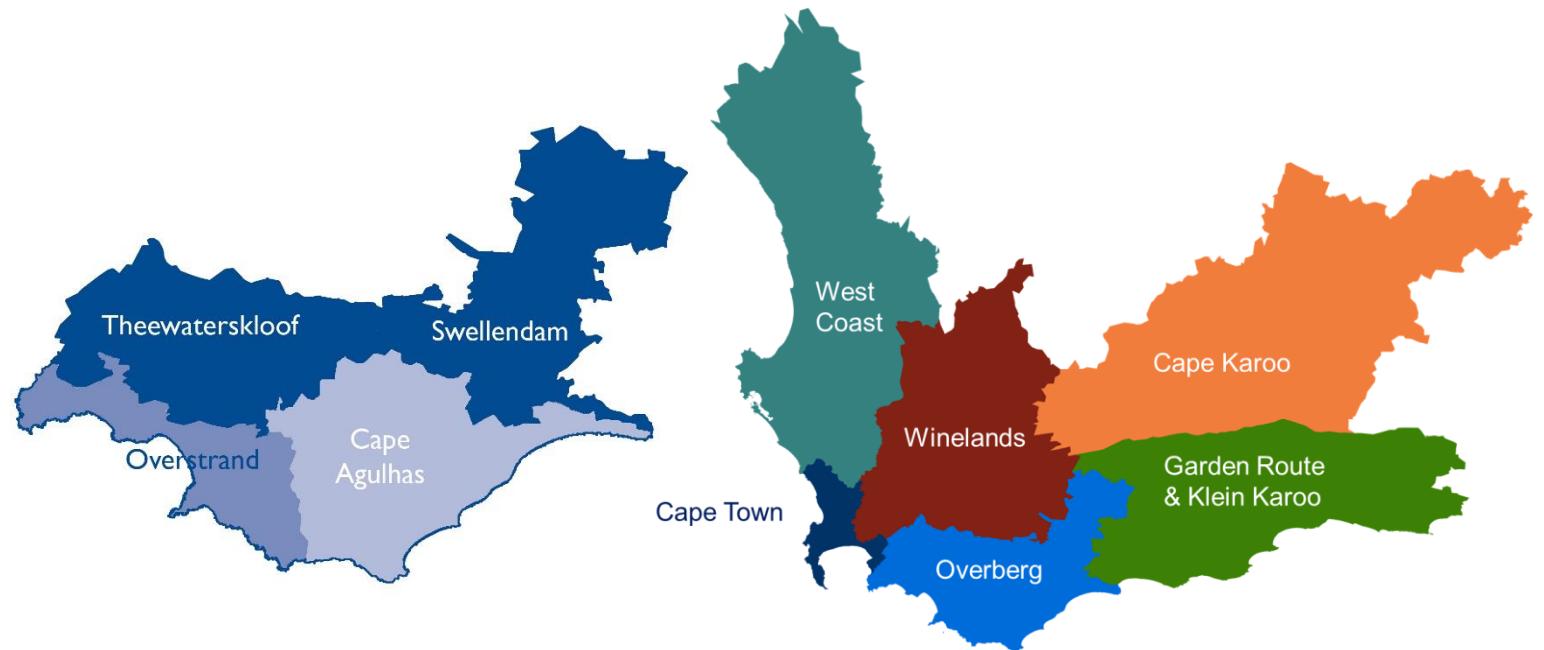
Responses to the regional visitor tracking surveys are used as a proxy to indicate the key trends within the Western Cape and the various regions. It is important to note that absolute figures cannot be determined from these surveys, as the survey responses are a sample of the tourists into the respective 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: Visitor: Any person travelling to a place other than his/her usual environment for less than 12 months and whose main purpose for the travel is other than the exercise of an activity to be remunerated at the place visited.

Between January and December 2023, a total of **5,895** responses to the regional visitor tracking surveys were received from the respective Tourism Offices in the Overberg. The participating Tourism Offices were:

Table 1: Total number of responses between January and December 2023

| Region | Number of Surveys |
|-------------------|-------------------|
| Hanglip Kleinmond | 3 427 |
| Hermanus | 1 616 |
| Stanford | 451 |
| Gansbaai | 401 |



3. Overberg attractions

- The number of visitors to attractions in the Overberg decreased between January and December 2023 in relation to the same period in 2022. The 18 participating Overberg attractions recorded a combined total of 250,180 visitors between January and December 2023, as shown in Figure 1. This represented a decrease of -12.2% in visitor numbers when compared to the same period in 2022 (284,786). However, there was an 82.7% recovery rate compared to the same period in 2019 (Jan–Dec).
- Among all the participating attractions, six recovered fully for the period January–December 2023, when compared to the corresponding period in 2019. These attractions included the Whale Trail, Grootvadersbosch Nature Reserve, Kogelberg Nature Reserve, Marloth Nature Reserve, Walker Bay Nature Reserve and Panthera Africa.
- Table 2 shows that the following were the top 5 attractions with the highest year-on-year growth rates compared to January–December 2022:
 1. Walker Bay Nature Reserve (45.7%)
 2. Agulhas National Park (32.1%)
 3. Marloth Nature Reserve (28.4%)
 4. De Hoop Nature Reserve (15.7%)
 5. Panthera Africa (9.6%)

3. Overberg attractions continued:

Figure 1: Total number of visitors to the Overberg attractions, Jan–Dec 2023

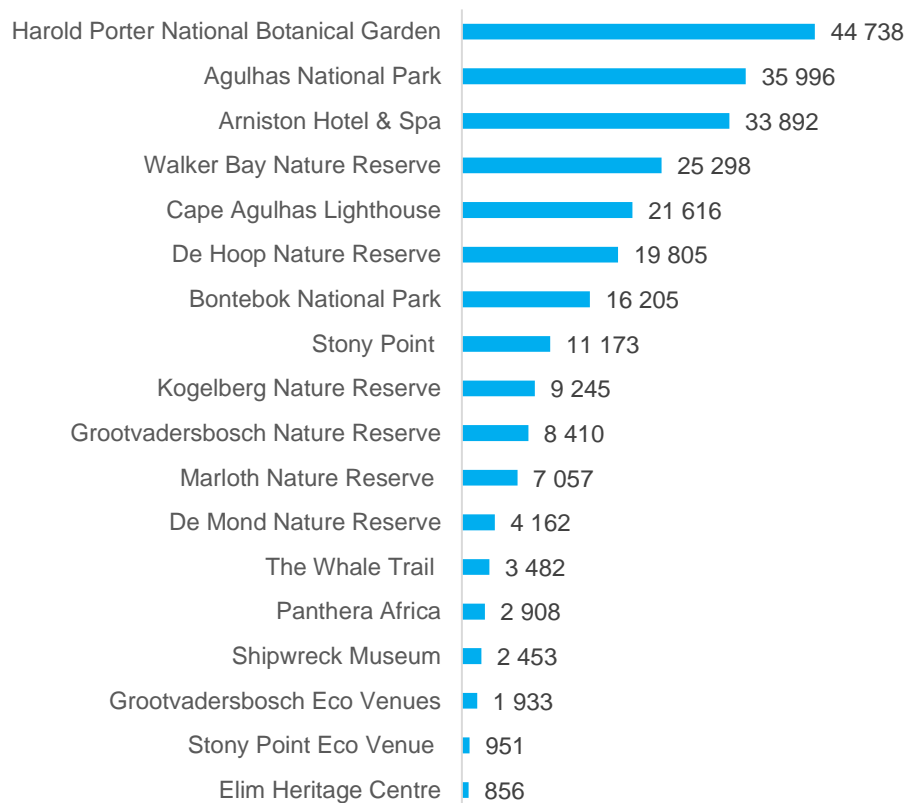



Table 2: Annual performance of Overberg attractions, Jan–Dec 2023

| Overberg Attractions | 2022/2023 % Change | 2019/2023 % Recovery |
|--|--------------------|----------------------|
| 1. Agulhas National Park | 32.1% | 88.8% |
| 2. Bontebok National Park | -1.0% | 72.1% |
| 3. Cape Agulhas Lighthouse | -2.2% | 62.5% |
| 4. Harold Porter National Botanical Garden | -1.9% | 103.1% |
| 5. Shipwreck Museum | -38.0% | 29.9% |
| 6. Panthera Africa | 9.6% | 57.9% |
| 7. Grootvadersbosch Nature Reserve | -7.3% | 152.3% |
| 8. Marloth Nature Reserve | 28.4% | 127.0% |
| 9. Walker Bay Nature Reserve | 45.7% | 178.6% |
| 10. De Hoop Nature Reserve | 15.7% | 75.1% |
| 11. De Mond Nature Reserve | -22.5% | 79.0% |
| 12. Kogelberg Nature Reserve | -9.2% | 137.0% |
| 13. Stony Point | -80.6% | 13.2% |
| 14. The Whale Trail | -11.5% | 9672.2% |

Note: No data was collected for Arniston Hotel & Spa, Elim Heritage Centre, Stony Point Eco Venue and Grootvadersbosch Eco Venues in 20219, hence not included in this table.

Sources: SANParks, Panthera Africa | Big Cat Sanctuary, L'Agulhas and Hangklip/Kleinmond Tourism Offices, 2024

An aerial photograph of the Overberg coastline in South Africa. The image shows a series of rugged mountains along the coast, with the ocean in the foreground. The water is a deep blue, and the sky is a pale, hazy blue. The mountains are dark and silhouetted against the lighter sky and water. The overall scene is serene and scenic.

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 share of respondents (86.0%) who visited the region between January and December 2023, whereas 14.0% of respondents were overseas travellers. This can be seen in Figure 2.
- Figure 3 shows that 40.8% of overseas travellers to the Overberg originated from Germany, followed by visitors from the UK (12.8%), and those from France (8.1%).
- The largest share of domestic travellers (90.8%) were from the Western Cape, as shown in Figure 4. This confirms the observation that locals enjoy the diversity of tourism offerings in their neighbouring regions.

Figure 2: % Share of overseas and domestic visitors to the Overberg, Jan–Dec 2023

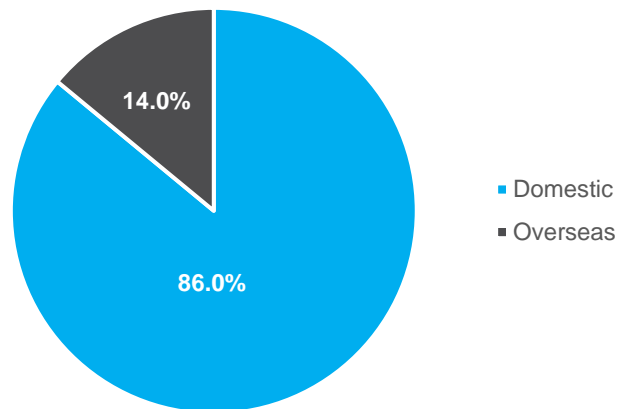


Figure 3: % Share of international visitors to the Overberg, Jan–Dec 2023

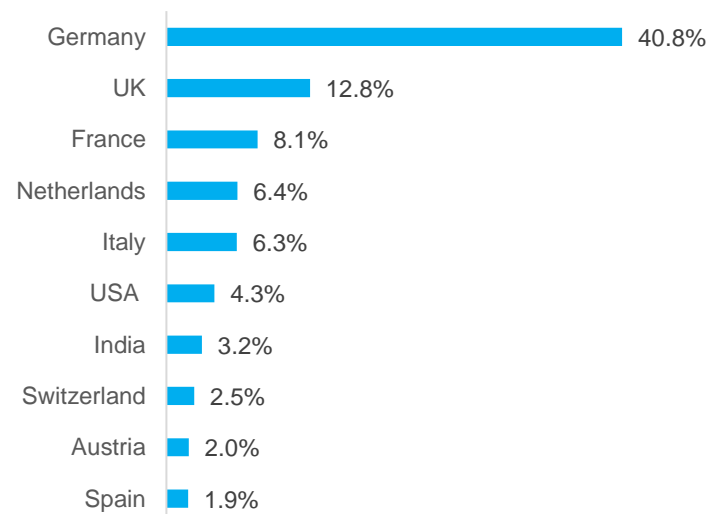
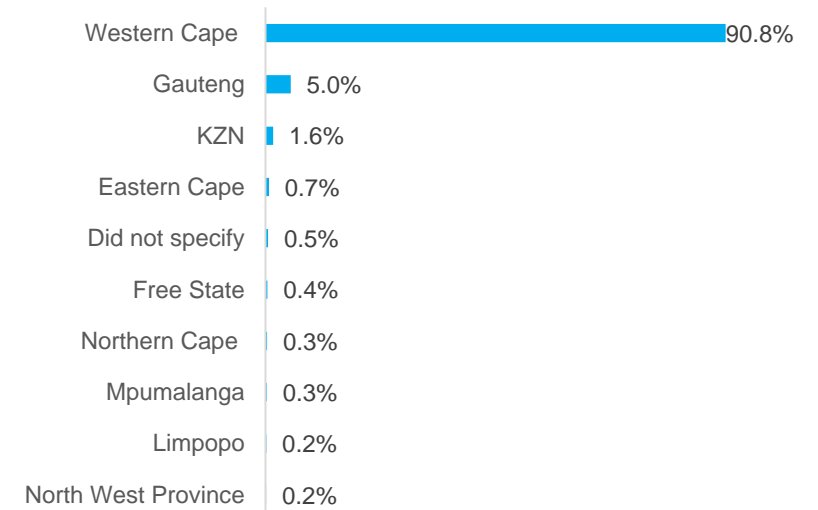
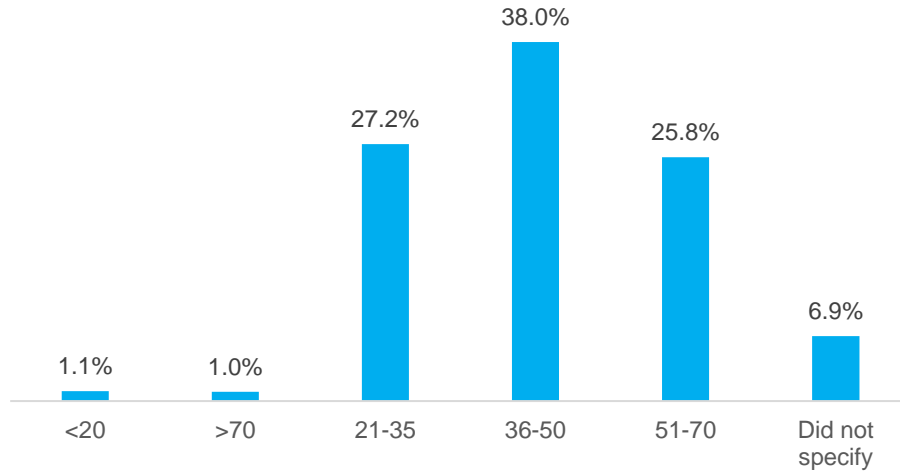


Figure 4: % Share of domestic visitors to the Overberg, Jan–Dec 2023



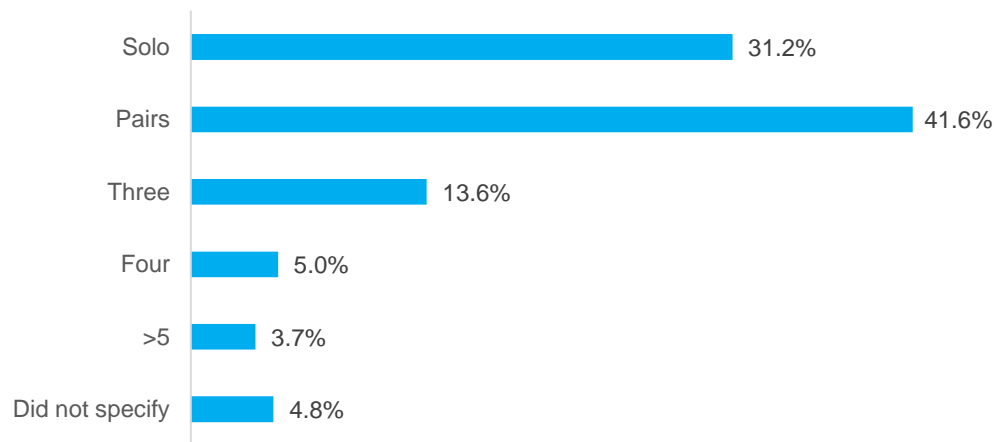
4. Overberg visitor trends & patterns

4.2 Figure 5: Age profile of visitors

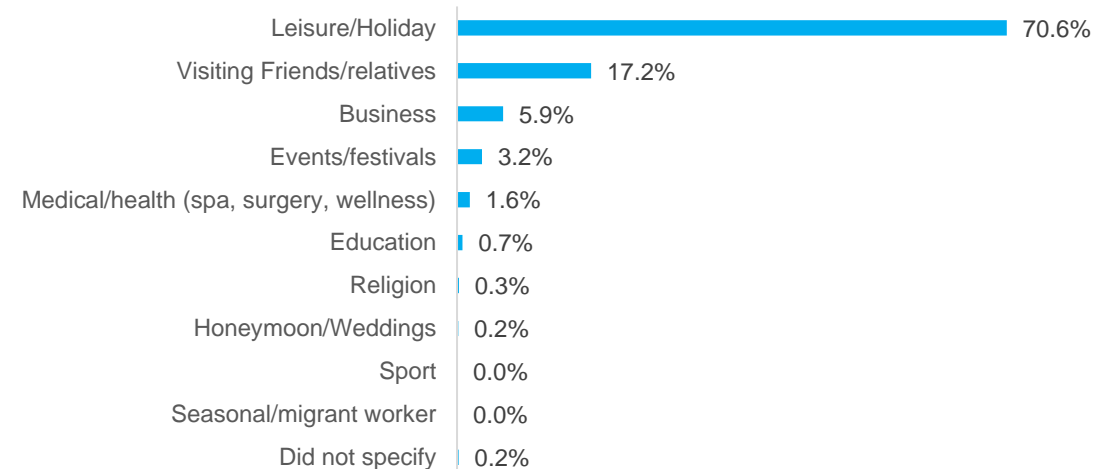


- Figure 5 illustrates that most visitors to the Overberg were in the age groups of 36–50, 21–35 and 51–70 years.
- The largest proportion of respondents (41.6%) travelled to the region in pairs, followed by 31.2% who were solo travellers. This is shown in Figure 6.
- In Figure 7, it can be seen that most of the visitors (71.6%) travelled to the region primarily for leisure/holiday and 17.2% visited friends and relatives. Some came for business (5.9%) and events/festivals (3.2%), whereas a small percentage visited for purposes of medical/health (1.6%).

4.3 Figure 6: Travel group size

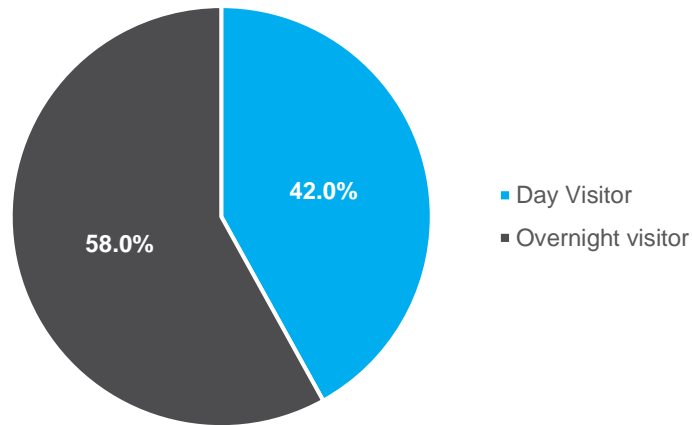


4.4 Figure 7: Purpose of visit



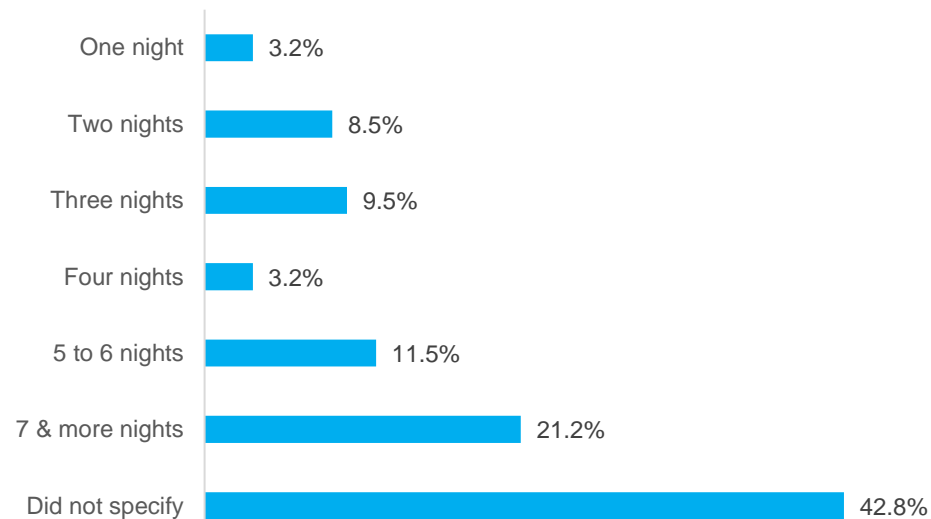
4. Overberg visitor trends & patterns

4.5 Figure 8: Overnight and day visitors

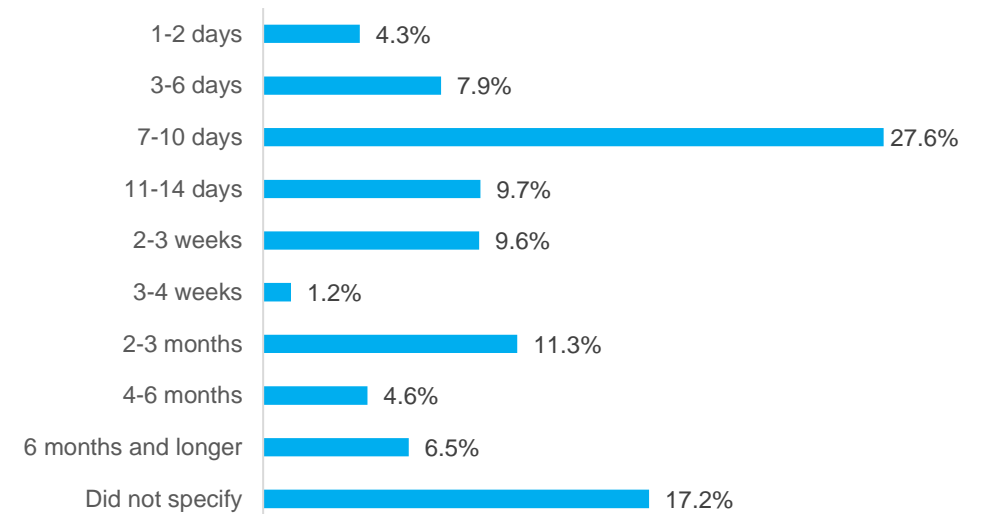


- The duration of a traveller's stay can be a significant factor in determining how much they are willing to spend or if they are likely to increase their overall expenses during their trip. This is because the length of their stay can impact their perception of the value they are receiving from the tourism-related experiences they use. For instance, a short stay may result in a traveller being more hesitant to spend money on leisure activities, while a longer stay could encourage them to explore more and spend more money as a result. This increase in demand for tourism-related experiences can have a direct impact on the economy and employment levels of a region or destination, as businesses catering to tourists experience a surge in activity.
- Therefore, between January and December 2023, close to 60% of visitors stayed overnight in the Overberg and 42.0 % took day trips.
- During the period under review, 21.2% of visitors stayed on average 7 or more days in the Overberg region and 27.6% stayed seven to ten days in the Western Cape. This can be observed in Figures 9 and 10.

4.6 Figure 9: Average length of stay in the Overberg region



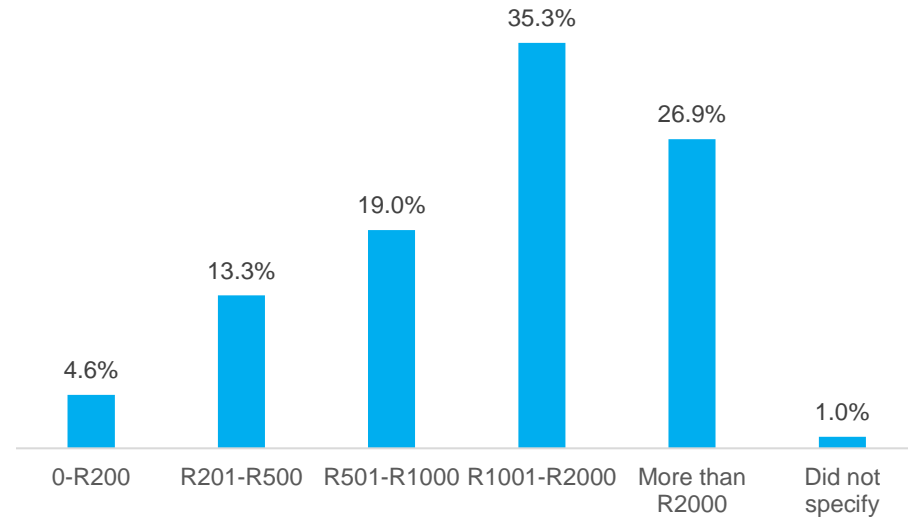
4.7 Figure 10: Average length of stay in the Western Cape



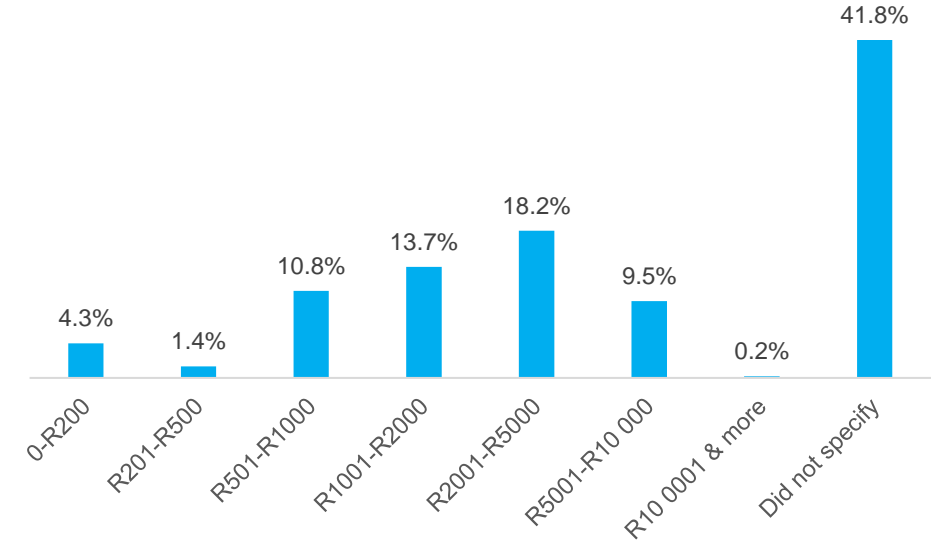
4. Overberg visitor trends & patterns

- According to recent data, it was found that 35.3% of visitors who visited the region spent an average of R1001–R2000 daily, as shown in Figure 11. This was followed by 26.9% of visitors who indicated that they spent more than R2000 on their daily expenses. Additionally, it was found that 19.0% of visitors spent between R501 to R1000 daily.
- When it came to average spending on accommodation, Figure 12 shows that 18.2% of visitors spent between R2001 to R5000 on their accommodation during their stay in the region. However, a high percentage of 41.8% of visitors did not provide information regarding their average spend on accommodation.

4.8 Figure 11: Average daily spend



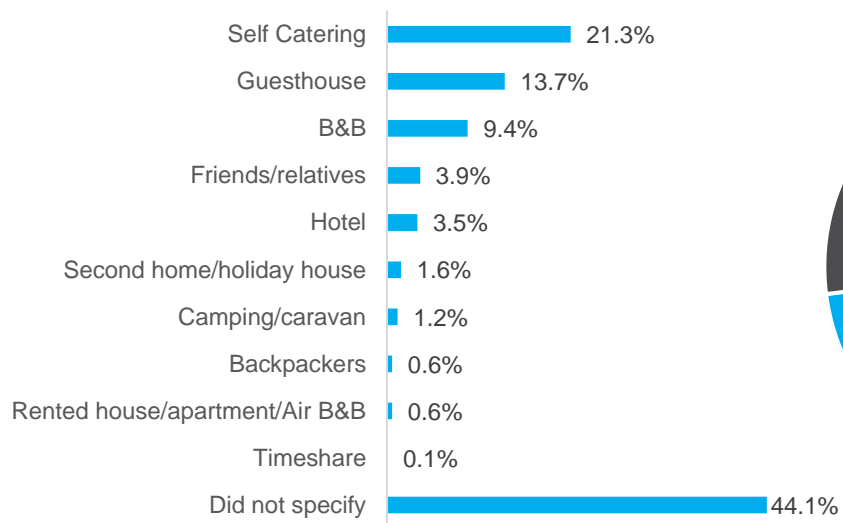
4.9 Figure 12: Average spend on accommodation



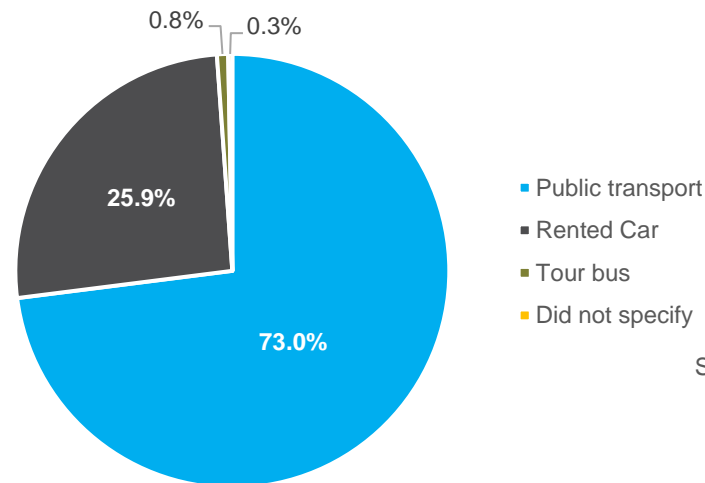
4. Overberg visitor trends & patterns

- According to recent surveys, the results of which are summarised in Figure 13, self-catering accommodations, guesthouses, and bed and breakfast (B&B) establishments were the most popular types of lodging options preferred by travellers visiting the Overberg region.
- Figure 14 shows that more than 70% of visitors chose to use public transport while exploring the region, indicating the prevalence of a reliable and efficient public transportation system in the area.
- It is worth noting that visitors' information centres (36.4%), word of mouth (31.2%), and return visits (12.4%) were identified as the most trusted sources of information by visitors when planning their trips to the Overberg, as shown in Figure 15. This highlights the importance of having accurate and relevant information readily available to aid visitors in their decision-making process.

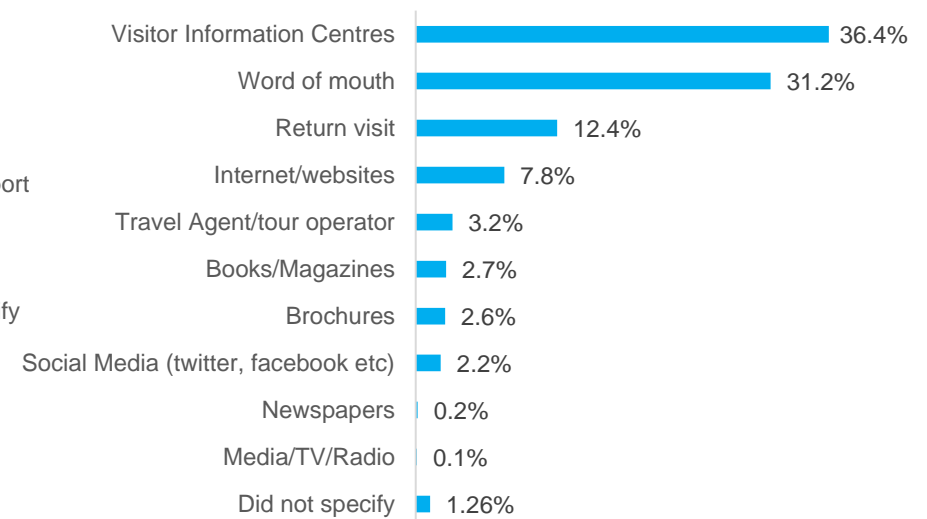
4.10 Figure 13: Accommodation usage



4.11 Figure 14: Mode of transport

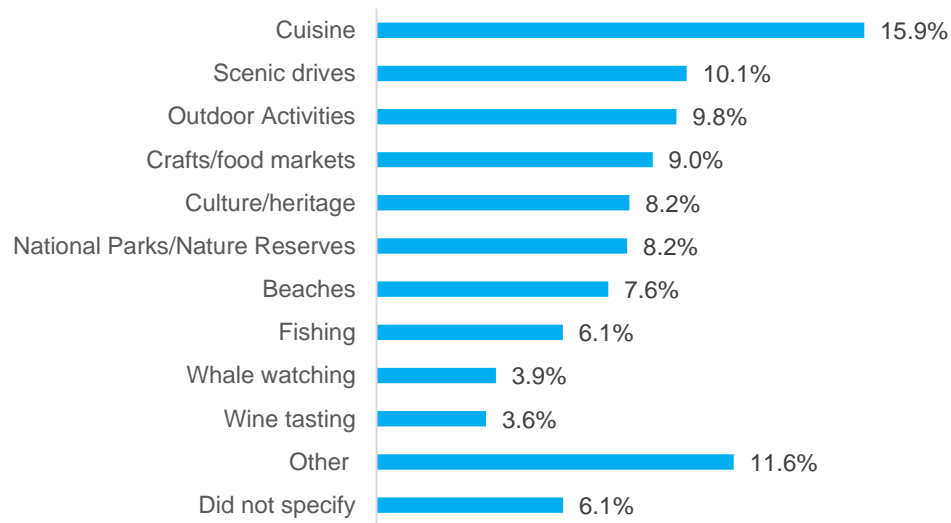


4.12 Figure 15: Top information sources



4. Overberg visitor trends & patterns

4.13 Figure 16: Top activities undertaken in the Overberg region



The figures presented in Figure 16 suggest that tourists visiting the region have diverse interests and preferences when it comes to engaging in various activities. The most popular activities among tourists included exploring different cuisines, taking scenic drives, participating in outdoor activities, visiting local food and craft markets, and experiencing cultural and heritage sites. These activities have gained immense popularity and are considered the top choices of visitors to the region.

Recently, the Inside Guide Hotlist 2024 has featured two breathtaking locations – Stanford and Gansbaai – that offer tourists a wide range of unique experiences. Stanford is renowned for its world-class cuisine experiences, where visitors can indulge in some of the most delectable dishes. Apart from this, the region also offers an array of cultural and heritage experiences that are steeped in history, giving visitors a glimpse into the rich cultural heritage of the region. The natural beauty of Stanford is unparalleled, with its breathtaking landscapes and scenic views that are sure to leave visitors awe-inspired. On the other hand, Gansbaai is known for its world-class whale-watching experiences that offer a unique and unforgettable glimpse into the majestic creatures of the sea. The region is also home to some of the most stunning natural wonders, making it a perfect destination for nature lovers. With so much to offer, Stanford and Gansbaai are definitely worth a visit!

The Overberg region is an excellent destination for cultural and heritage experiences that not only create job prospects but also encourage economic growth. Visitors show immense interest in these attractions, which empowers the local community to actively engage with their culture (World Economic Forum, 2024). This not only highlights but also emphasises the critical role that tourism plays in preserving culture, promoting diversity, managing heritage sites, and protecting the environment. The Elim Heritage Centre and Shipwreck Museum are popular and significant attractions that showcase the potential of these sites to the region.

5. Acknowledgements

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The participating local tourism offices in the Overberg included:

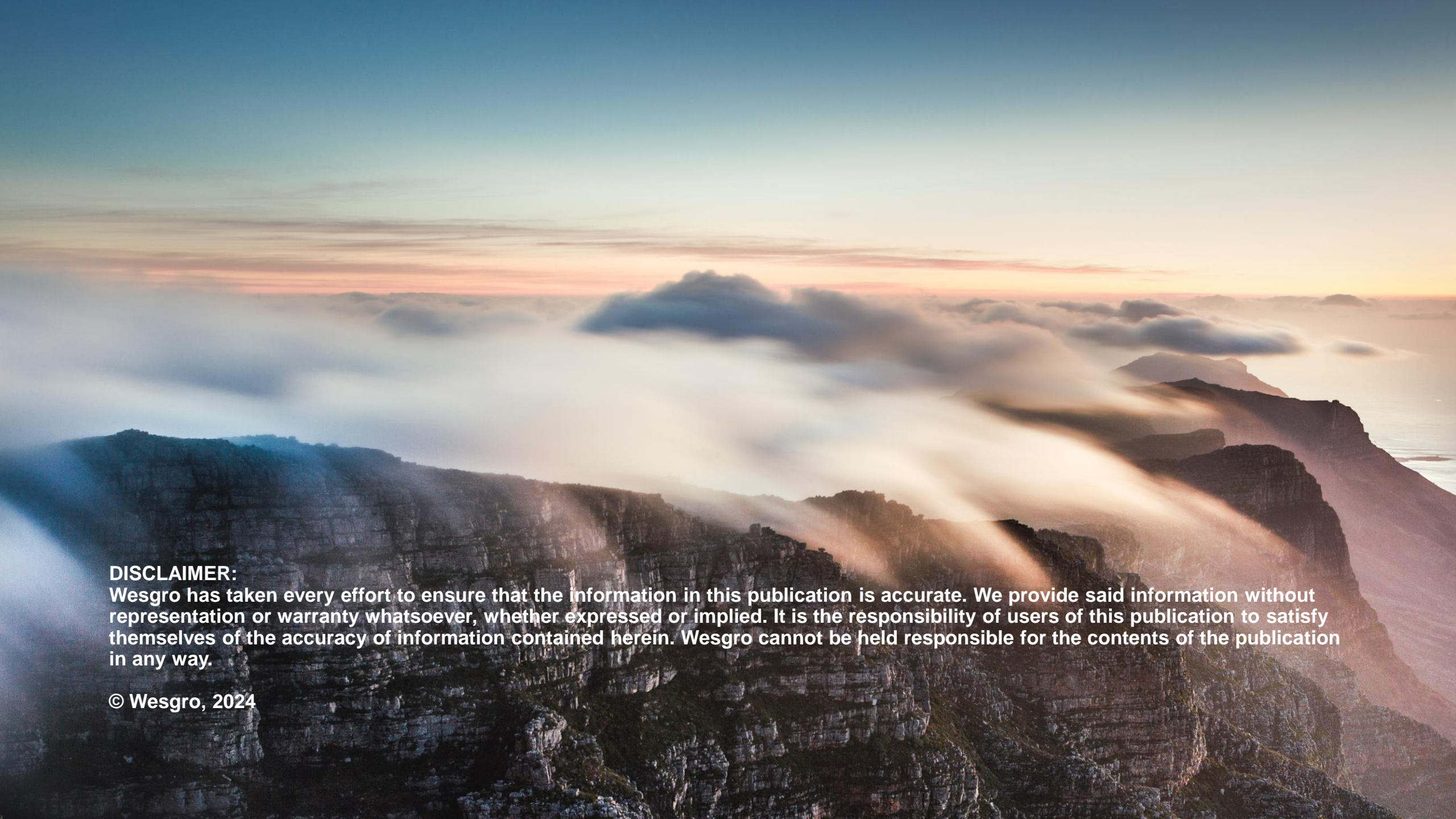
Cape Agulhas
Gansbaai
Hangklip Kleinmond
Hermanus
Stanford

The participating attractions in the Overberg included:

- Agulhas National Park
- Harold Porter National Botanical Garden
- Walker Bay Nature Reserve
- Arniston Hotel & Spa
- De Hoop Nature Reserve
- Cape Agulhas Lighthouse
- Bontebok National Park
- Kogelberg Nature Reserve
- Grootvadersbosch Nature Reserve
- Marloth Nature Reserve
- The Whale Trail
- Panthera Africa
- Shipwreck Museum
- Grootvadersbosch Eco Venues
- Stony Point Eco Venue
- De Mond Nature Reserve
- Elim Heritage Centre
- Stony Point

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