



# Overberg Tourism Visitor Trends

January – June 2023

# Contents

<b>1. Executive summary</b>
<b>2. Methodology and sample size</b>
<b>3. Overberg Attractions</b>
<b>4. Overberg Visitor Trends &amp; Patterns</b>
4.1 Origin of visitors
4.2 Age profile of visitors
4.3 Travel group size
4.4. Purpose of visit
4.5 Overnight stay and day Visitors
4.6 Overnight stay visitors in the Overberg region
4.7 Average length of stay in the Western Cape
4.8 Average daily spend
4.9 Average spend on accommodation
4.10 Accommodation usage
4.11 Mode of transport
4.12 Top information sources
4.13 Top activities undertaken in the Overberg region
<b>5. Acknowledgements</b>

# 1. Executive summary

- The attractions highlighted in this report include the renowned Agulhas National Park, Bontebok National Park, Cape Agulhas Lighthouse, De Hoop Nature Reserve, De Mond Nature Reserve, Harold Porter National Botanical Garden, Kogelberg Nature Reserve, Stony Point and Shipwreck Museum. Collectively, these attractions welcomed a total of 76,484 visitors between January and June 2023. This reflects a 65.4% recovery rate when compared to the same period in 2019.
- Only 2 of these attractions portrayed strong resilience and recovered very well when compared to the period from January to June 2019. The highest recovery was recorded at Kogelberg Nature Reserve (135.7%) and Harold Porter National Botanical Garden (116.3%).
- The tourism offices based in Cape Agulhas, Gansbaai, Hangklip Kleinmond, Hermanus, and Stanford welcomed a share of 72.5% of domestic travellers of whom 91% came from the Western Cape.
- The overseas market accounted for 27.5% 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.
- Three-quarters of visitors travelled to the Overberg for a holiday and 17.3% for visiting friends and family. Cuisine experience was ranked as the top tourism activity enjoyed in the region, followed by outdoor activities, scenic drives and visits to crafts/food markets.
- Overnight visitors accounted for more than 50% of visitors and 40.6% were day visitors. Most overnight visitors spent 7 or more nights in the region and self-catering was the preferred accommodation type for most overnight visitors. Public transportation (used by 73.2% of visitors) was the most used mode of transportation and while 26.4% of visitors used rented cars.
- Some 32.4% of visitors spent on average R1001-R2000 per day in the region and a further 20.9% spent between R501-R1000 per day. Regarding accommodation expenditure, 16.9% of visitors spent between R2001 and R5000 on this expense.

## 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.*

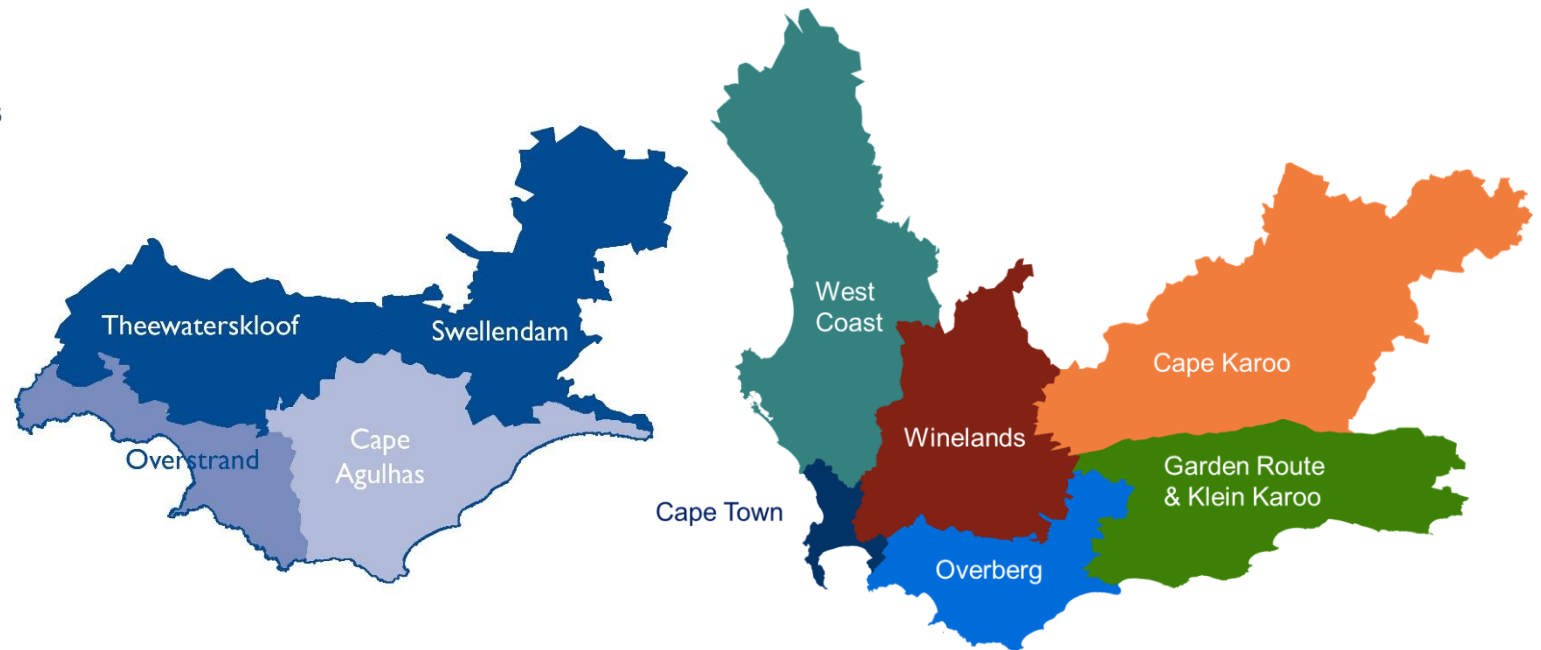
*Responses to the regional visitor tracking surveys are used as a proxy to indicate the key trends within the Western Cape and the various regions. It is important to note that absolute figures cannot be determined from these surveys, as the survey responses are a sample of the tourists into the respective 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 June 2023**, a total of **3,009** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Overberg. The participating Tourism Offices were:

Table 1: Total number of responses from January to June 2023

Region	Number of Surveys
Hangklip Klainmond	1,684
Hermanus	861
Stanford	390
Gansbaai	74



# 3. Overberg attractions

- The number of visitors to outdoor attractions in the Overberg decreased slightly during the first six months of 2023. The 9 participating Overberg attractions recorded a combined total of 76,484 visitors between January and June 2023. This represented a decrease of -24.7% in visitor arrivals when compared to the same period in 2022 (101,513). However, there was a 65.4% recovery rate compared to the same period in 2019.
- These 2 outdoor attractions were top-rated and exceeded their January to June 2019 visitor levels in 2023:
  1. The Kogelberg Nature Reserve recorded 3,506 visitors from January to June 2023, representing the highest recovery rate of 135.7% compared to the same period in 2019 but a significant decrease of -43.9% compared to the same period in 2021.
  2. The Harold Porter National Botanical Garden recorded a total of 23,439 visitors from January to June 2023, representing a recovery rate of 116.3% when compared to the same period in 2019 but showing a slight decrease of 1.5% in visitor growth in comparison to the same period in 2021.
- Despite the decrease in visitor numbers at the Overberg attractions, the following top 5 attractions have shown positive indicators of recovery when compared to the same period in 2019, namely, Kogelberg Nature Reserve, Harold Porter National Botanical Garden, De Mond Nature Reserve, Cape Agulhas Lighthouse and Bontebok National Park.

# 3. Overberg attractions

Figure 1: Total number of visitors to the Overberg attractions, Jan-Jun 2023

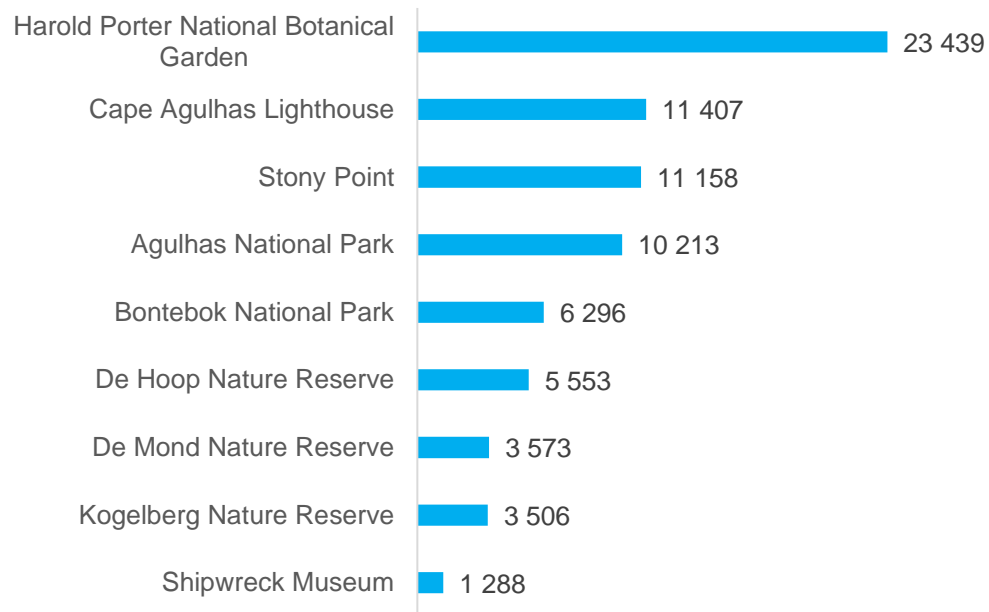



Table 2: Overberg attractions half year performance, Jan-Jun 2023

	2022/2023 % Change	2019/2023 % Recovery
1. Kogelberg Nature Reserve	-43.9%	135.7%
2. Harold Porter National Botanical Garden	-1.5%	116.3%
3. De Mond Nature Reserve	20.8%	100.7%
4. Cape Agulhas Lighthouse	3.3%	73.1%
5. Bontebok National Park	-13.0%	64.1%
6. Agulhas National Park	-26.7%	56.9%
7. De Hoop Nature Reserve	-19.7%	53.7%
8. Stony Point	-59.1%	34.3%
9. Shipwreck Museum	-37.1%	29.7%

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

An aerial photograph of the Overberg region in South Africa, showing a range of rugged mountains and a coastline with a sandy beach. 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.

# 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 (72.5%) between January and June 2023, whereas 27.5% of respondents were overseas travellers.
- Most of the international travellers to the Western Cape originated from Germany (51.2%). This was followed by visitors from the UK (12.0%), and those from France which accounted for 8.2% of the visitors.
- The largest share of domestic travellers (91.0%) were from the Western Cape, which confirms the observation that locals enjoy the diversity of tourism offerings in the province. Gauteng and KwaZulu-Natal ranked as the other leading sources of provincial visitors to the Western Cape.

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

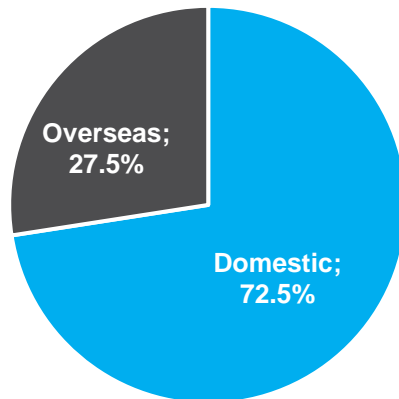


Figure 3: Top international visitors to the Overberg, Jan-Jun 2023

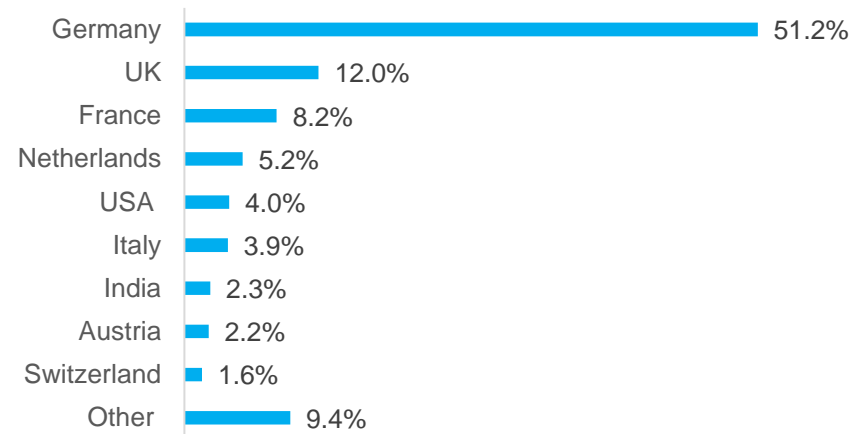
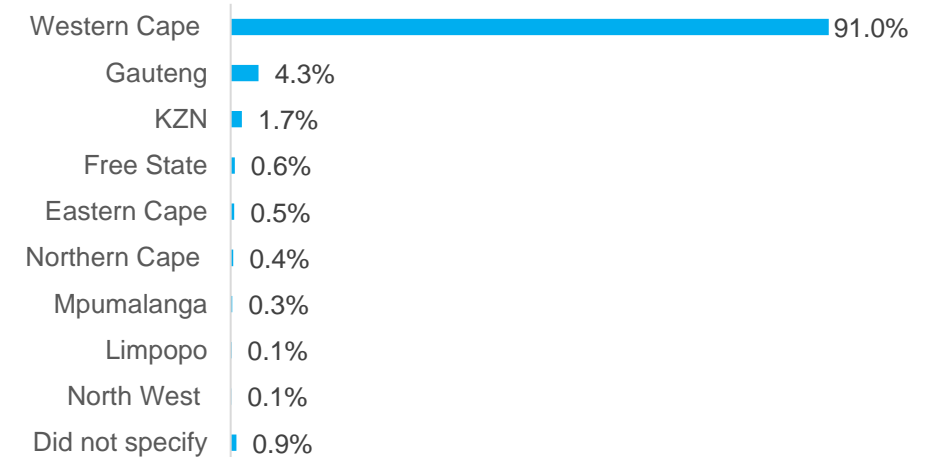


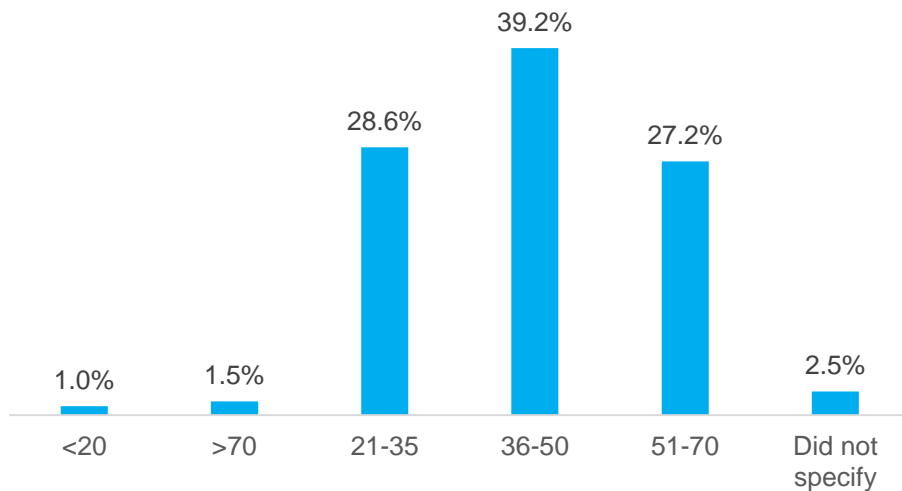
Figure 4: % Share of domestic visitors to the Overberg, Jan-Jun 2023





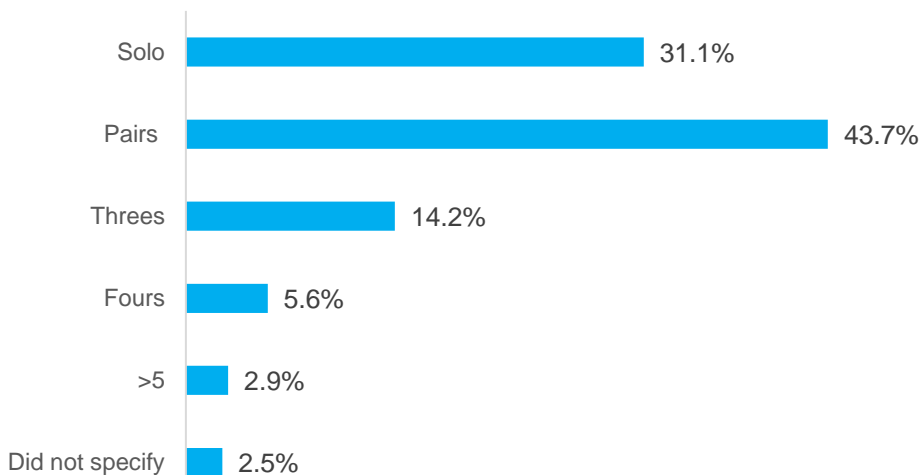
# 4. Overberg visitor trends & patterns

4.2 Figure 5: Age profile of visitors

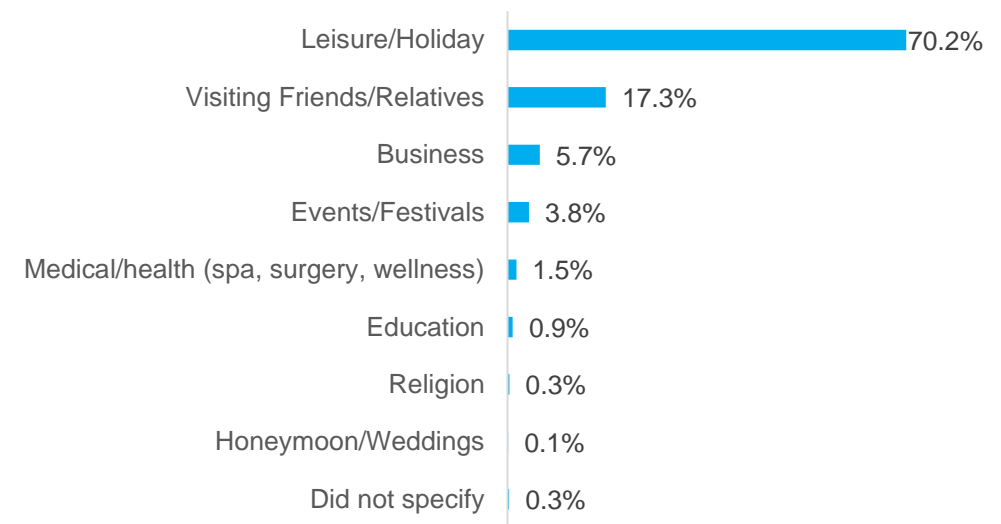


- Most visitors to the Western Cape were in the age groups of 36—50 and 21—35 years.
- The largest proportion of respondents (43.7%) travelled to the province in pairs, followed by 31.1% who were solo travellers.
- The majority of the visitors (70.2%) travelled to the Western Cape primarily for leisure/holiday and 17.3% visited friends and relatives. Some came for business (5.7%) and events/festivals (3.8%), whereas a small percentage visited for purposes of medical/health and education.

4.3 Figure 6: Travel group size

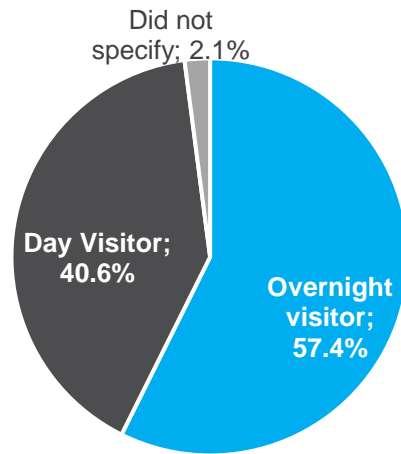


4.4 Figure 7: Purpose of visit



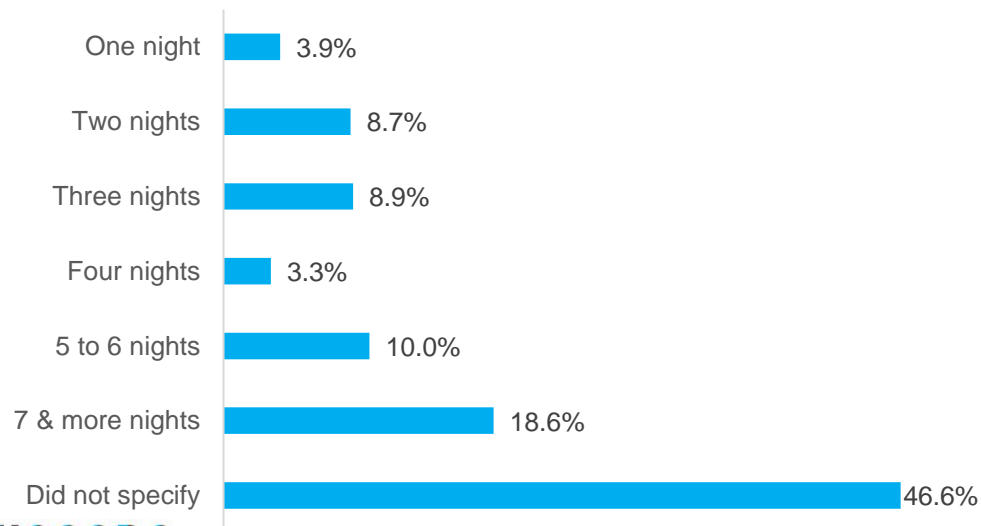
# 4. Overberg visitor trends & patterns

4.5 Figure 8: Overnight stay and day visitors

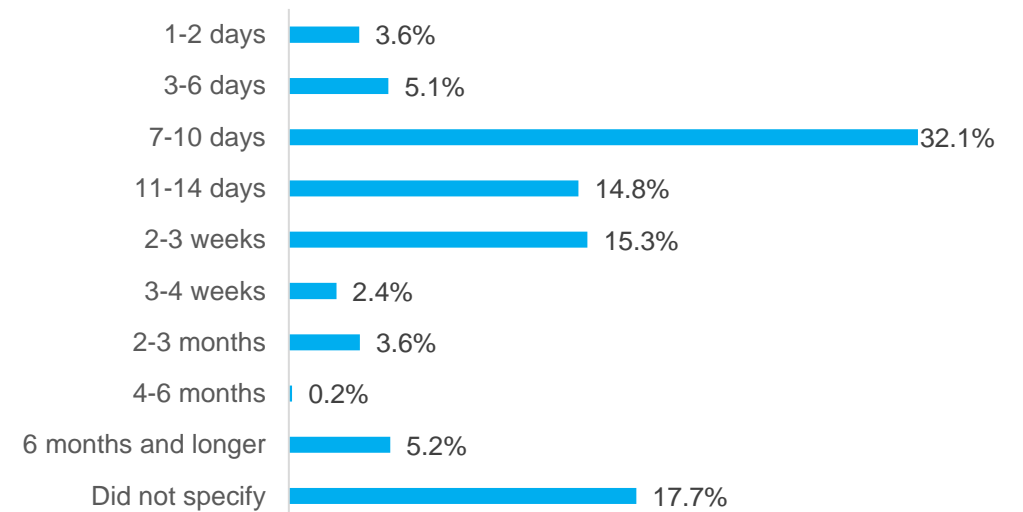


- Length of stay can play a major role in influencing individuals' willingness to spend more or increase the total expenditure when travelling. As a result, this can potentially increase the demand for tourism-related services, which has a direct impact on the employment levels and economy of a region or destination.
- Between January and June 2023, more than half of visitors (57.4%) stayed overnight in the Overberg and 40.6% took day trips.
- During this period, 18.9% of visitors stayed on average 7-10 days in the Overberg region and 3.2% stayed 7-10 days in the Western Cape.

4.6 Figure 9: Overnight in the Overberg region



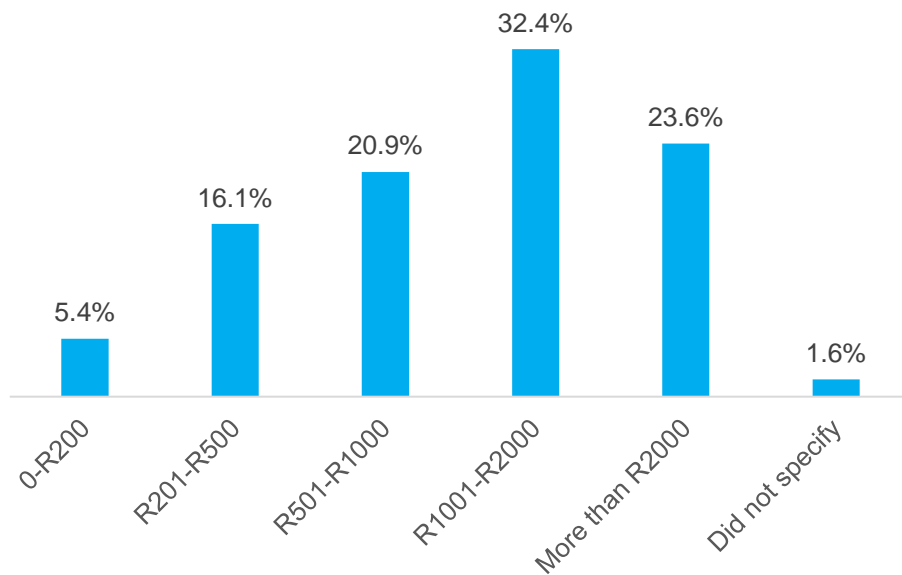
4.7 Figure 10: Average length of stay in the Western Cape



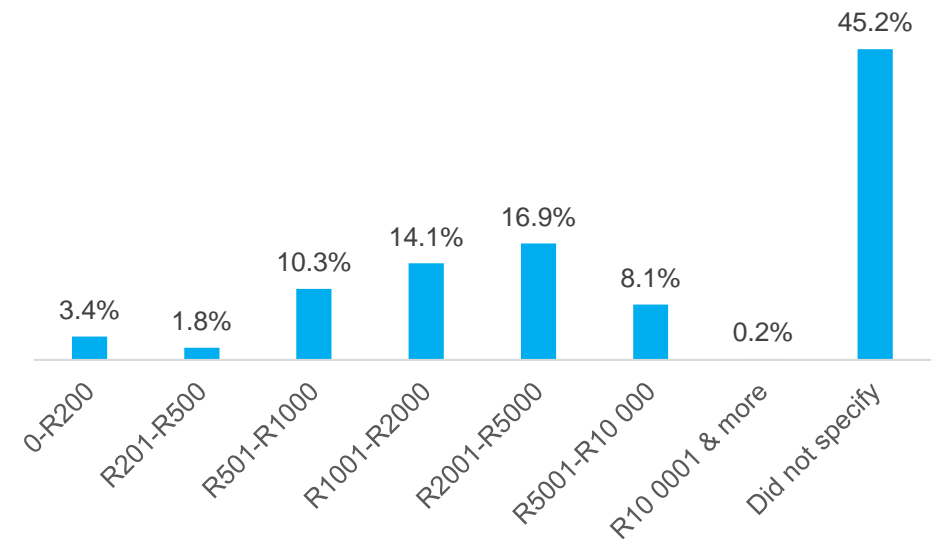
# 4. Overberg visitor trends & patterns

- More than 30% of visitors spent on average R1001-R2000 daily. This was followed by 23.6% of visitors who indicated an average expenditure of more than R2000 and 20.9% who spent between R502 and R1000 daily.
- Regarding average spend on accommodation, more than 15% of visitors spent between R2001 and R5000 on accommodation during their overnight stay in the Overberg region. However, a high percentage of more than 40% of visitors did not indicate their average spend on accommodation.
- As previously mentioned, length of stay can influence visitors' willingness to spend more when visiting a destination. Based on the survey, 1.9% of visitors stayed for 7 or more nights in the region, which influenced the higher average daily spending and accommodation expenses during visitors' stay in the Overberg.

4.8 Figure 11: Average daily spend



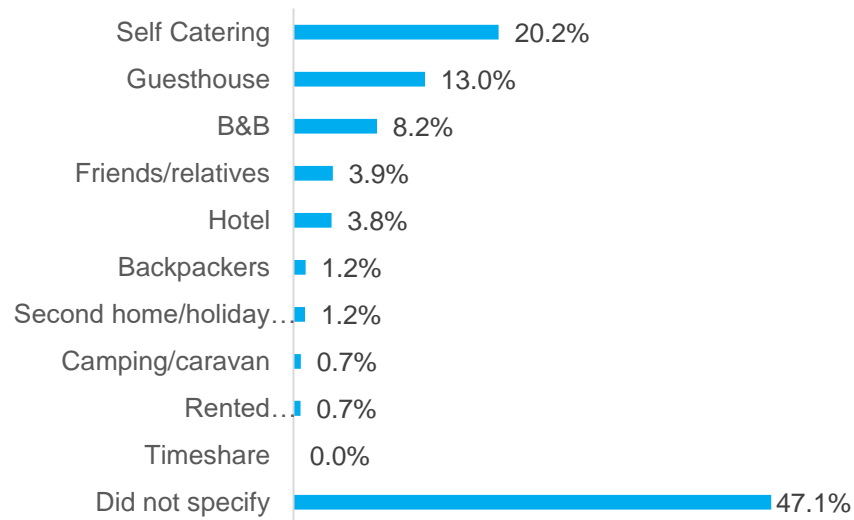
4.9 Figure 12: Average spend on accommodation



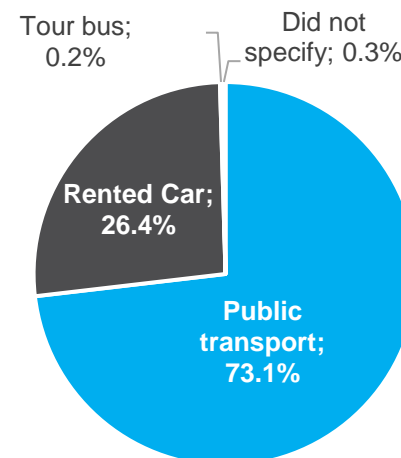
# 4. Overberg visitor trends & patterns

- Self-catering, guesthouses and bed and breakfast (B&B) establishments ranked as the top 3 accommodation choices among travellers.
- Over 70% of visitors used public transport to while visiting the Overberg region.
- Consumer studies report that information sources can influence an individual's decision-making process when preparing for a trip. Visitors' information centres (35.3%), word of mouth (30.5%), and return visits (13.4%) were ranked as the most used information sources by visitors when planning their trips to the Overberg region.

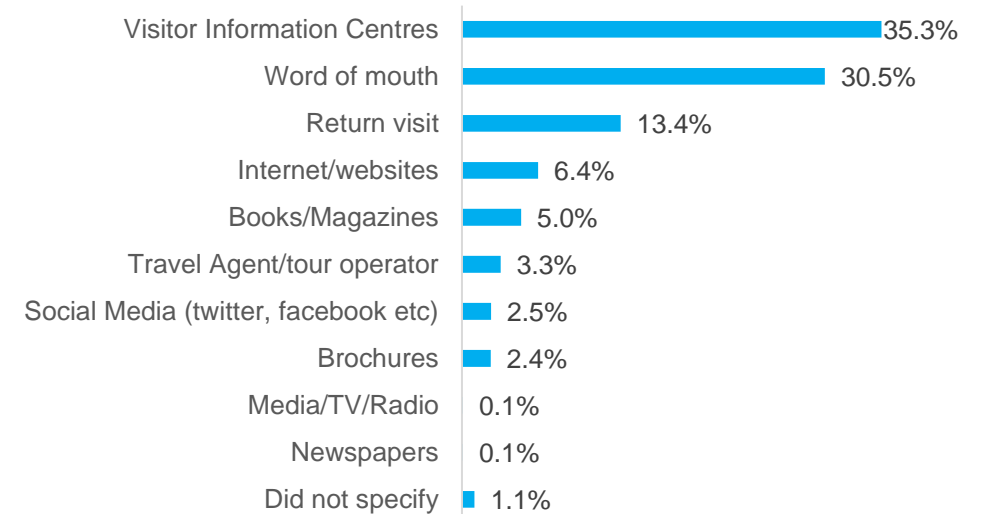
4.10 Figure 13: Accommodation usage



4.11 Figure 14: Mode of transport



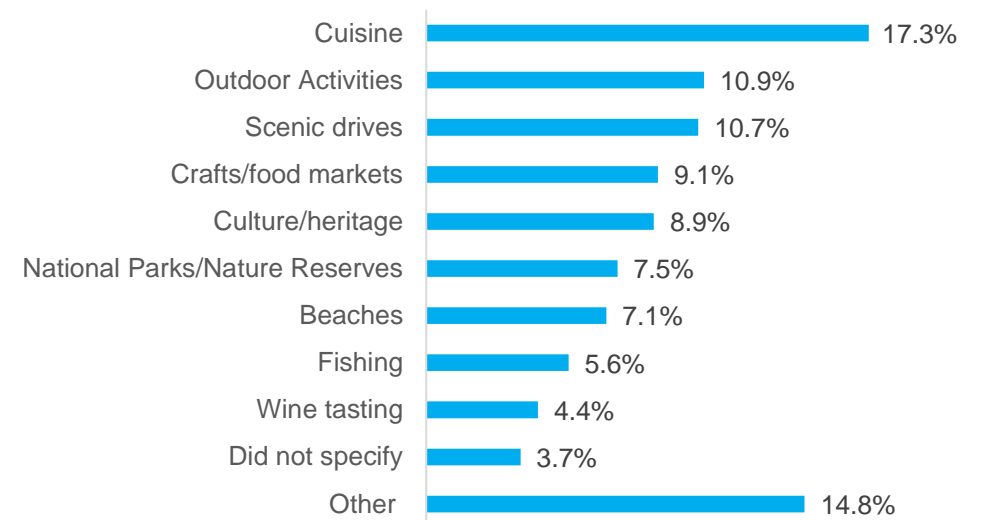
4.12 Figure 15: Top information sources



# 4. Overberg visitor trends & patterns

- The Overberg region offers a variety of activities that visitors can enjoy, like visits to the best wineries, getting the adrenaline pumping through adventure activities, and experiencing close-up encounters with whales and bird species. These activities make the region a perfect escape from the hustle and bustle of city life.
- The Overberg region is celebrating the massive success of having one of their visitor attractions recognised as one of the Most Loved Destinations Around the World. Based on the Tourism Sentiment Index, Hermanus was ranked 18th out of the top 100 Most Loved Destinations Around the World for 2023.
- It comes as no surprise, that the region's most popular activity for visitors is cuisine experiences. In 2019, the Overstrand Municipality, comprising of Hermanus and other nearby villages and towns, was recognized by UNESCO (United Nations Educational, Scientific and Cultural Organization) as a Creative City of Gastronomy (UNESCO, 2023).
- Outdoor activities, scenic drives, and visits to crafts/food markets were also ranked as the most popular activities undertaken by visitors.

4.13 Figure 16: Top activities undertaken in the Overberg region



# 5. Acknowledgements

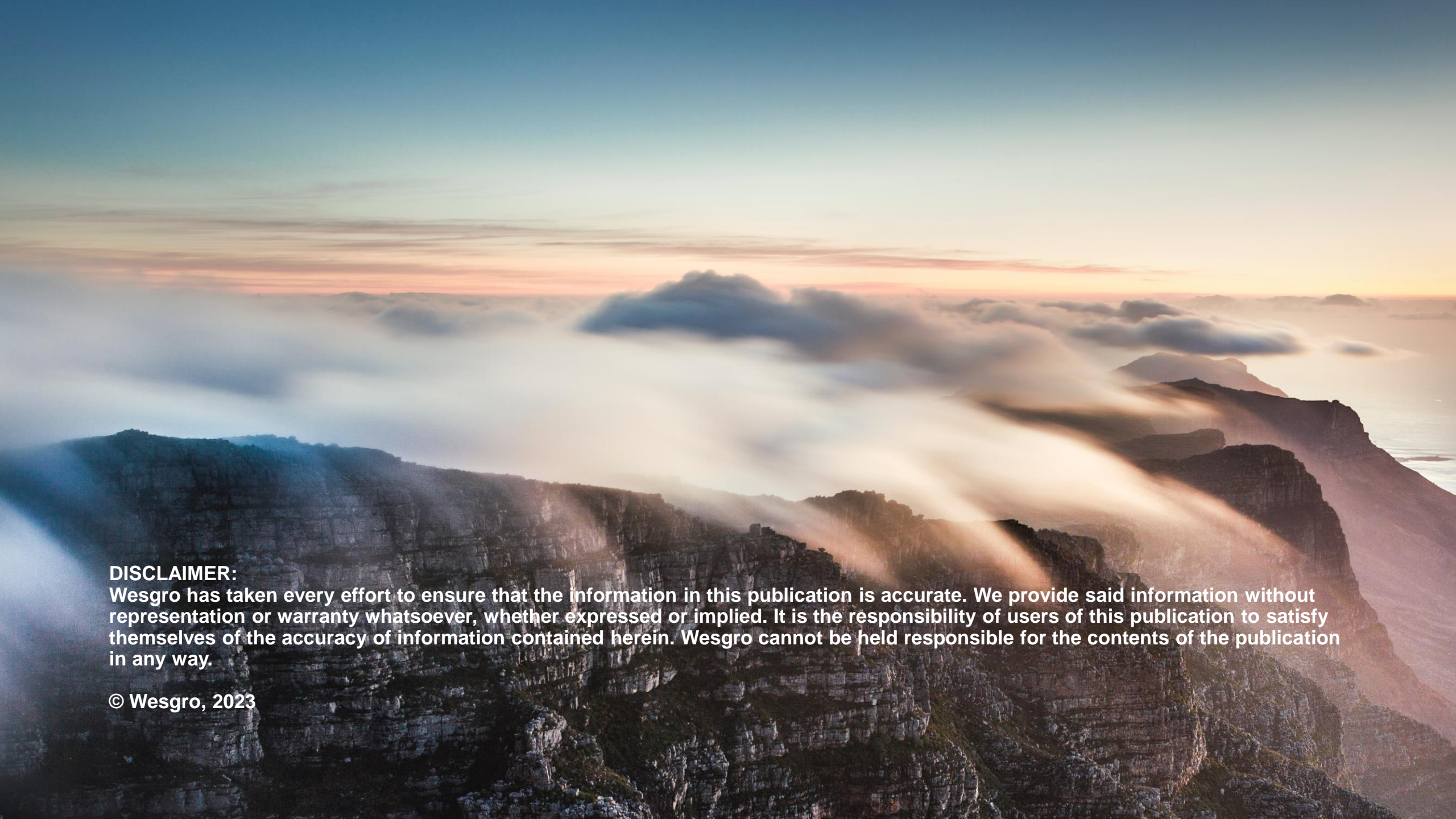
Acknowledgements and many thanks go to the Overberg District Municipality and the following tourism offices for supplying the data which made this publication possible and whose continued and unwavering support will sustain the forthcoming issues.

## **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