



## Cape Overberg Regional Trends

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research

2020

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# 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. Average Spend on Accommodation
  - 4.11. Average daily spend in the Cape Overberg
5. Performance of the Cape Overberg Attractions
6. Cape Overberg 2020/21 Festive Season Performance Survey Results
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.

The tourism industry was particularly affected by the closing of beaches and the ban on alcohol due to stricter lockdown regulations as a result of a second wave of COVID-19 infections. This report also highlights the findings from a survey undertaken with tourism businesses in February 2021 to understand the effects that the COVID-19 pandemic and lockdown regulations have had on tourism in the Western Cape regions over the 2020/21 Festive Season.

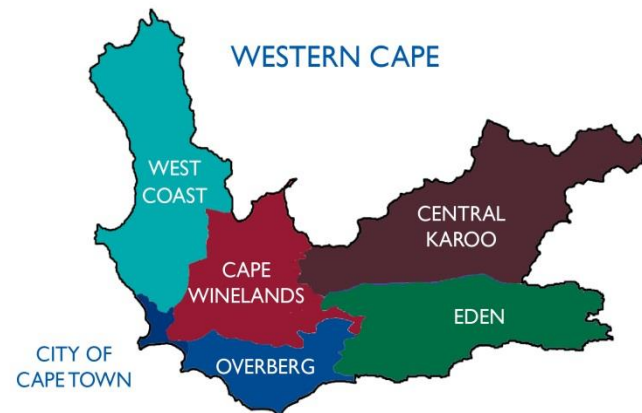
Survey Monkey was used as the main research tool to develop the questionnaire and electronic link. Regional Tourism Bodies in the Western Cape and the Local Tourism Authorities (LTA's) assisted in circulating the survey to all their members.

## 2. Participation and sample size

Between January and December 2020, a total of **918** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Cape Overberg. The participating Tourism Offices were:

Gansbaai	41
Hangklip Kleinmond	775
Stanford	102

The trends related to the impact of COVID-19 on tourism businesses in this report are based on feedback from **55 respondents** who were based in the Cape Overberg and follows the same methodology as that of the regional tracking survey.

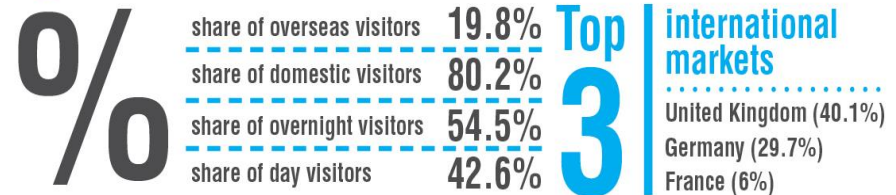


## 3. Executive Summary

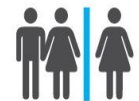
- In an effort to curb the spread of COVID-19, the South African national government announced a nationwide lockdown which took effect on 26 March 2020, resulting in a complete standstill of all tourism activity until 31 May 2020. In line with government's risk adjusted strategy, limited tourism activity was introduced in June and international borders re-opened in October. However, stricter lockdown restrictions were back over the festive season as a result of a second wave of COVID-19 infections.
- As a result, visitors to the participating Cape Overberg attractions decreased by 63,7% year-on-year. All attractions in the region were closed throughout quarter two of 2020 due to the nationwide lockdown, and started opening up slowly during the second half of the year.
- Tourism offices based within the Cape Overberg welcomed a share of 80,2% domestic travellers and 19,8% of visitors were from the overseas markets.
- United Kingdom (40,1%), Germany (29,7%), and France (6%) ranked as the region's top three international markets. The domestic market was led by travellers from the Western Cape (94,7%) 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 72,7% of visitors mainly travelling for leisure. Business (8,7%) followed as the second largest share of travellers to the region.
- Just over half of respondents indicated overnight stays and the most common age profile of visitors to the Cape Overberg were between 36-50 (43%) and 21-35 (22,2%) years. Visitors to the region mainly travelled in pairs (39,4%) and on their own (47,7%).
- Visitors spent on average R501-R1000 (24%) per day in the region. The top three activities enjoyed in 2020 included scenic drives, cuisine, and outdoor activities.
- According to the 2020/2021 Festive Season survey, 83,6% of businesses confirmed that their revenue decreased significantly compared to the same period last year.
- Majority of respondents recorded occupancy percentages of 30% or less in November 2020 and January 2021. There was some relief in December 2020 with two fifths of respondents recording more than 50% occupancy.

### Cape Overberg Visitor Trends 2020

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#### Main purpose of visit



**Travel group size**

Pairs	39.4%
Alone	47.7%

**Age group**

36-50	(43%)
21-35	(22.2%)

#### Length of stay



**Transport**

Rented car	16%
Own vehicle	76.3%

#### Top information sources

Word of mouth	35.7%
Visitor information centres	50.8%

**Average daily spend**  
R501 – R1000 (24%)



**Top 3 activities in the Cape Overberg**

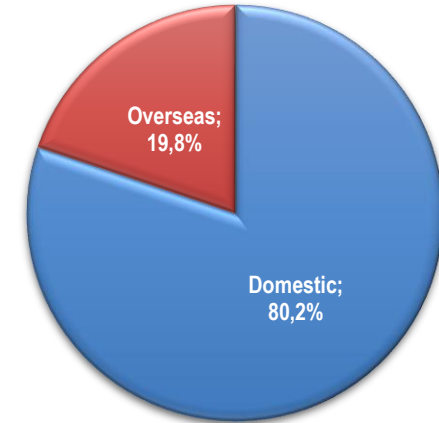
Scenic Drives	(34.5%)
Outdoor Activities	(57.1%)
Cuisine	(15.6%)

## 4. Cape Overberg Visitor Trends & Patterns

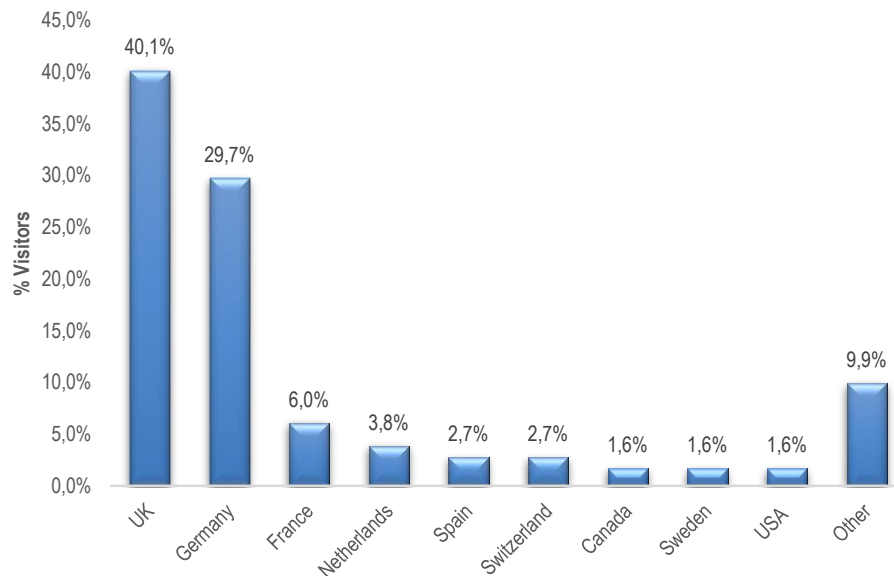
### 4.1 Origin of Visitors

- Domestic visitors made up 80,2% of travellers to the Cape Overberg in 2020, likely due to international travel restrictions brought on by the COVID-19 pandemic.
- Majority of overseas visitors who travelled to the Overberg region did so between January and March. Traditional markets such as the United Kingdom, Germany, and France ranked as the region's top three international markets.
- Despite financial and economic constraints, trends indicate that domestic travellers continue to travel. Over the period January to December 2020, 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 for the region.

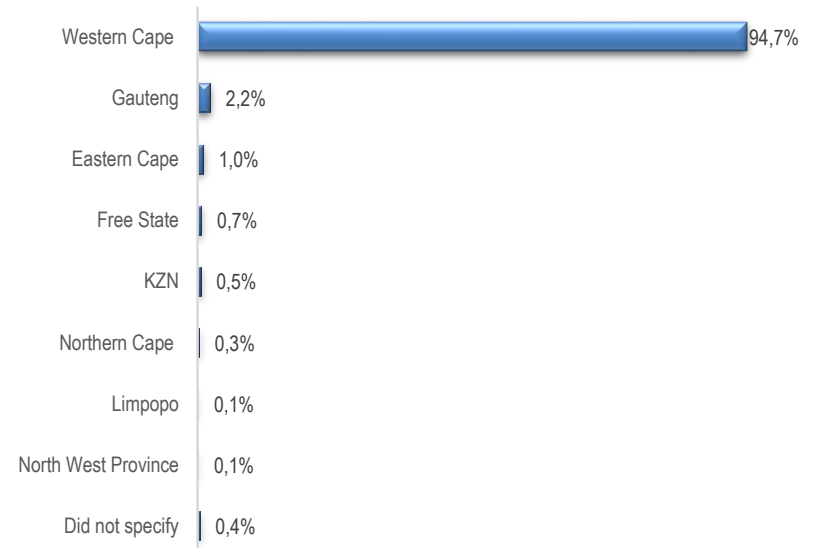
% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO THE CAPE OVERBERG, 2020



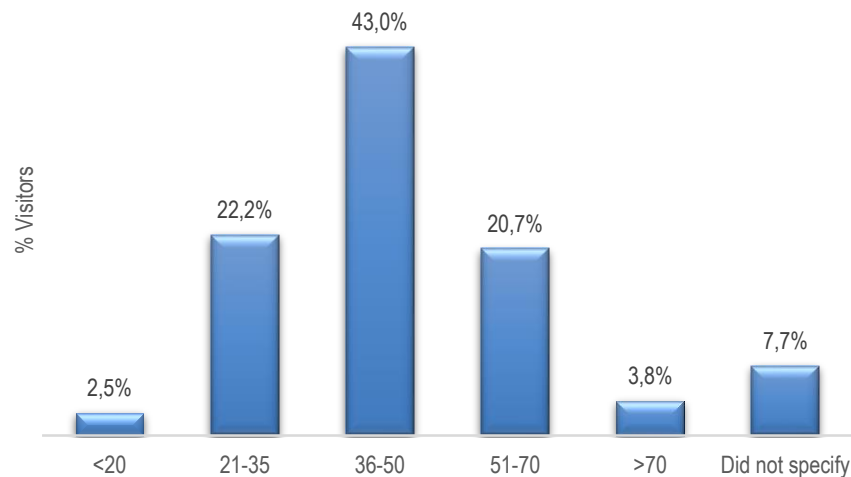
TOP INTERNATIONAL VISITORS TO THE CAPE OVERBERG, 2020



% SHARE OF DOMESTIC VISITORS TO THE CAPE OVERBERG, 2020

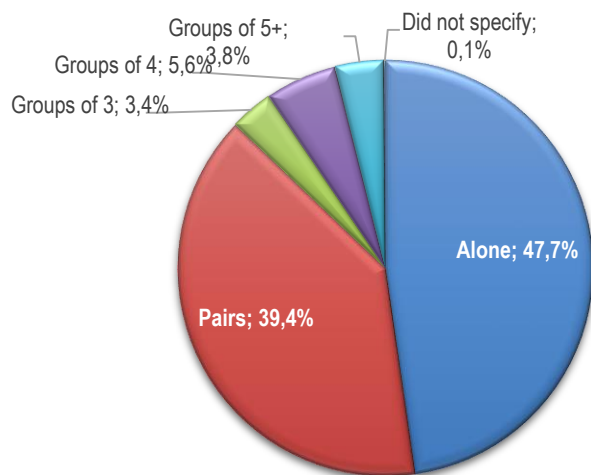


## 4.2 Age profile of visitors

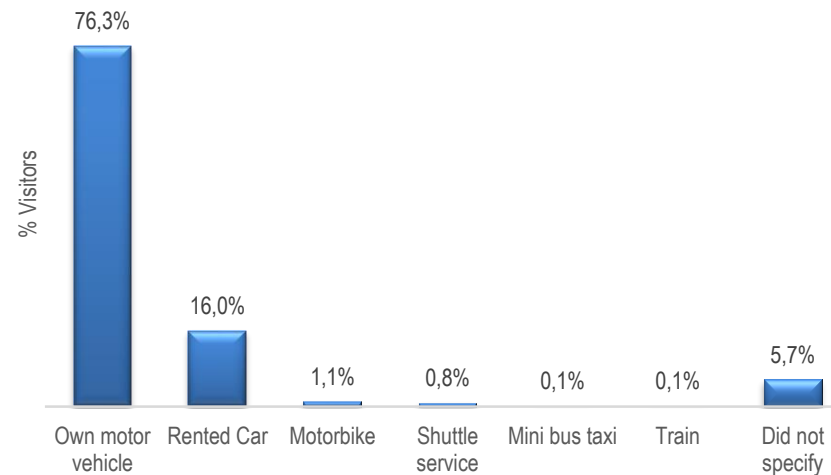


- The Overberg is a region that stretches along coasts with beautiful beaches, and over mountain ranges with interesting geological formations, abundant birdlife and fynbos, making it an all-round destination for all ages.
- In 2020, the leading age group was between 36 and 50 years (43%). A further 22,2% of respondents were between the ages of 21 and 35 years and 20,7% were between the ages of 51 and 70 years.
- Nearly half of respondents travelled alone (47,7%) and a further 39,4% travelled in pairs.
- The vast majority of respondents travelled to the region with their own vehicle (76,3%) or via rented car (16%).

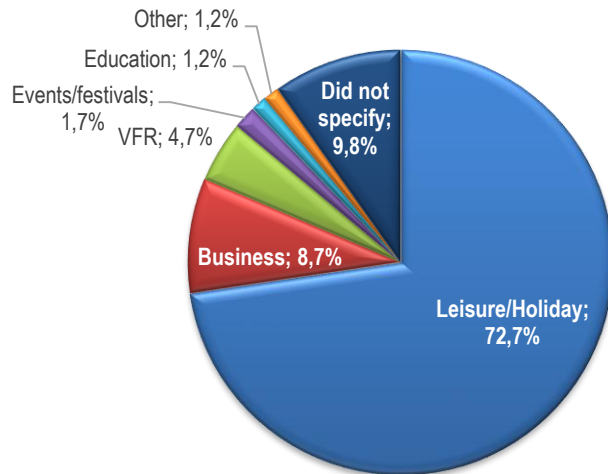
## 4.3 Group size



## 4.4 Mode of transport



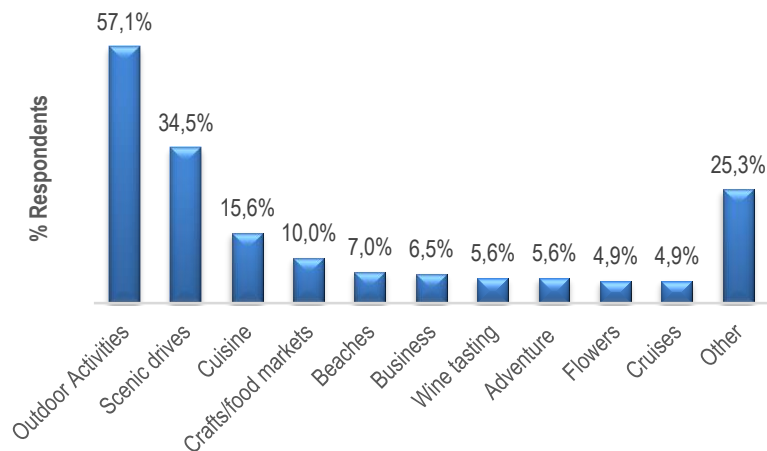
## 4.5 Purpose of visit



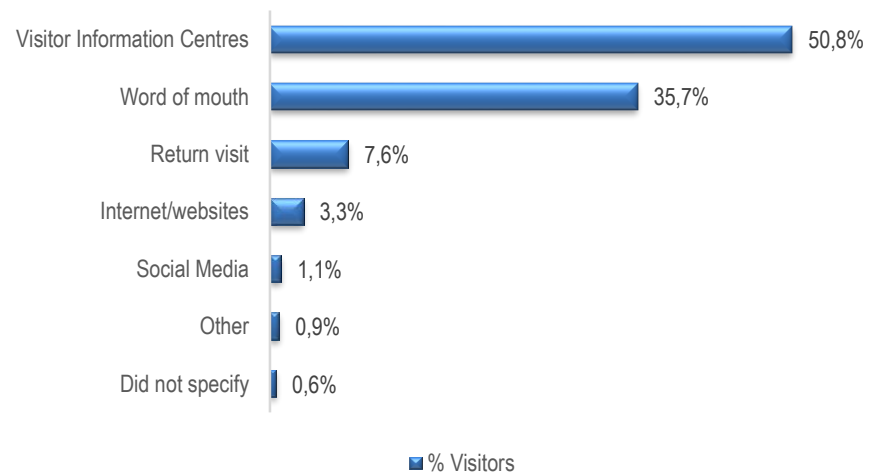
\*Other: Includes travel for health & wellness, honeymoon/weddings, and seasonal/migrant workers.

- The most prominent motivating factor for travel to the Cape Overberg was for the purpose of holiday/leisure (72,7%).
- Travel for Business (8,7%) and Visiting Friends and Family (VFR) (4,7%) ranked as part of the top three reasons for visiting the Cape Overberg region.
- Outdoor activities (57,1%), scenic drives (34,5%), and cuisine (15,6%) were the top three activities undertaken in the region.
- Activities under the 'other' category included culture/heritage, national parks/nature reserves, whale watching, fishing, birding, golf, cycling, events, shopping, shark cage diving, game reserves, expos/exhibitions, sporting events-participator, and nightlife/clubbing.
- Visitor Information Centres (50,8%), word of mouth (35,7%), and return visit (7,6%) were the top 3 sources used by visitors to gather information about the region.

## 4.6 Top Activities Undertaken in the Cape Overberg



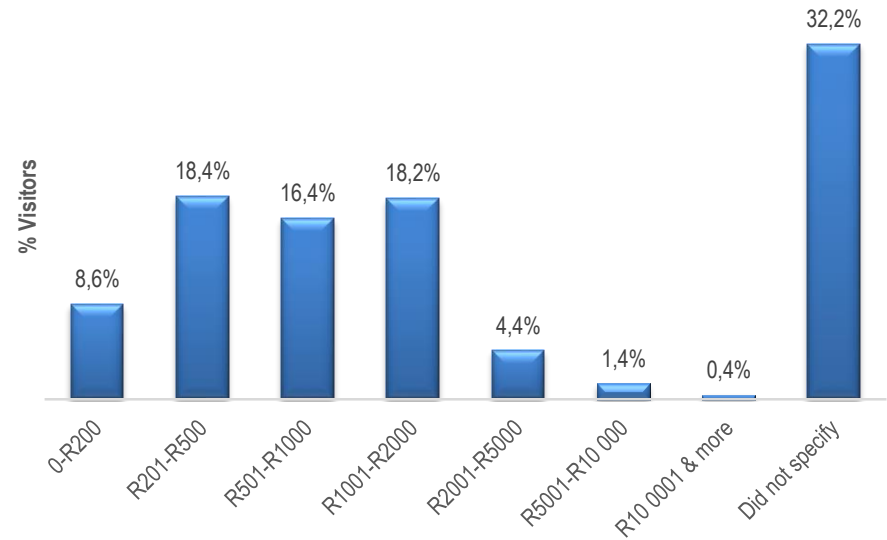
## 4.7 Top information sources



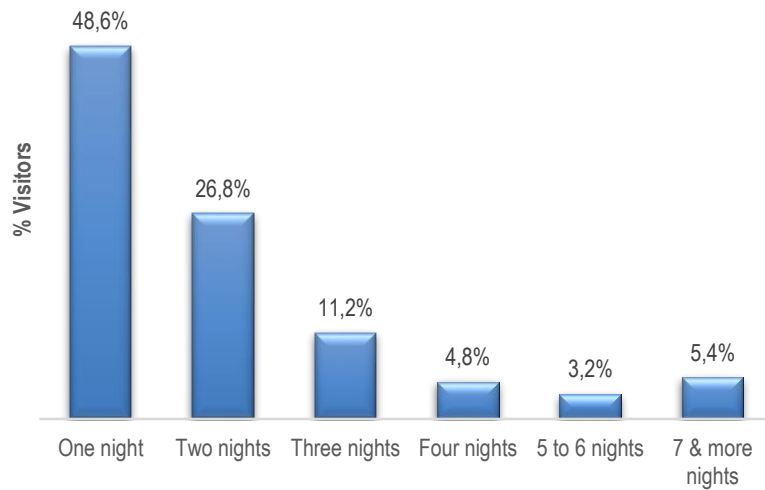
#### 4.8 Overnight stay



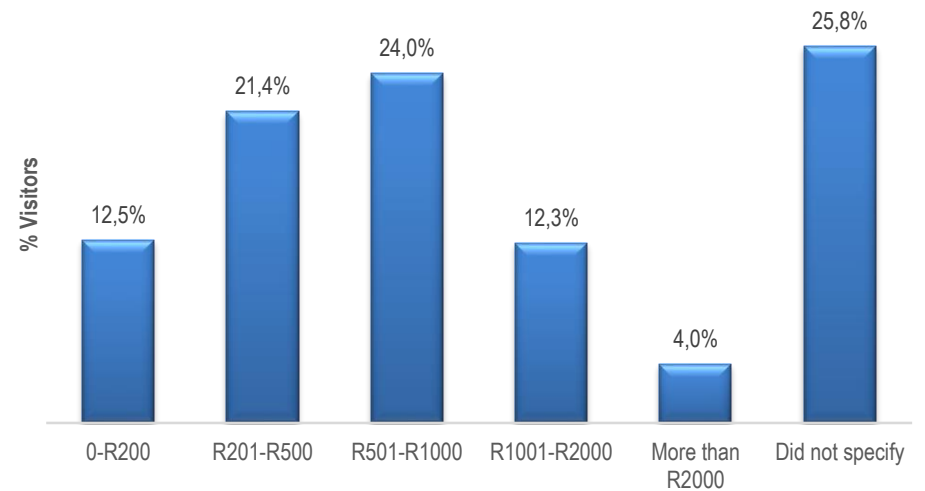
#### 4.10 Average Spend on Accommodation



#### 4.9 Average Length of Stay



#### 4.11 Average Daily Spend

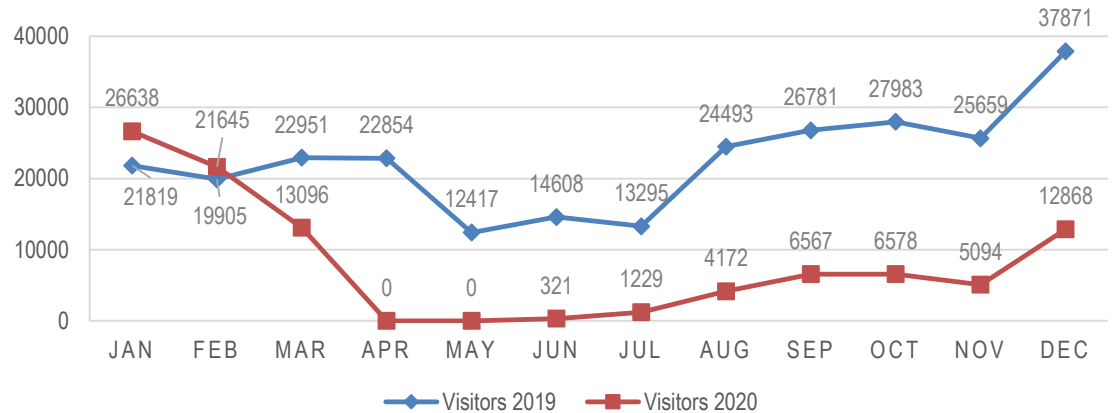




## 5. Performance of Cape Overberg Attractions

- The participating Cape Overberg attractions recorded a combined total of 270 636 visitors between January and December 2019 and decreased by 63,7% to 98 208 over the same period in 2020;
- Visitor numbers for January (+22,1%) and February (+8,7%) indicate that tourism in the region was on an upward trend but plummeted in March (-42,9%) due to COVID-19 restrictions.
- Attractions in the region were closed throughout quarter two of 2020 due to the nationwide lockdown, and started opening up slowly during the second half of the year.

TOTAL NUMBER OF VISITORS TO THE CAPE OVERBERG ATTRACTIONS, JAN-DEC 2019/20



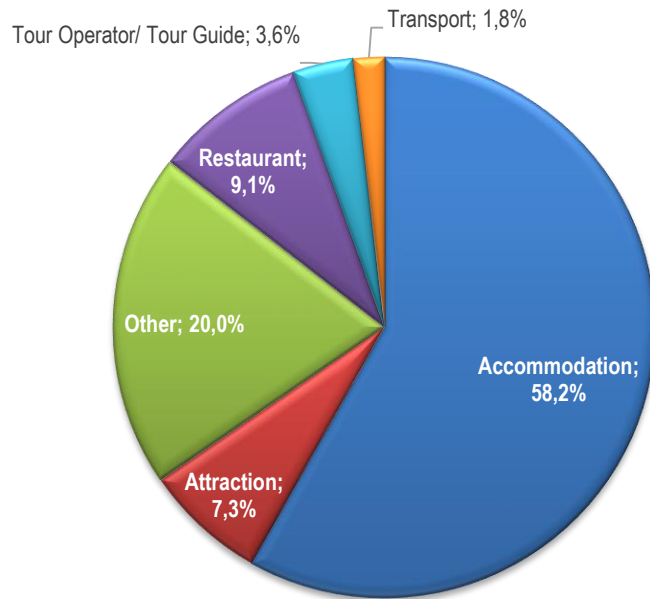
TOTAL NUMBER OF VISITORS TO PARTICIPATING CAPE OVERBERG ATTRACTIONS, JAN - DEC 2020



	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20
Agulhas National Park	4 340	2 729	1 704	0	0	0	0	98	280	273	294	612
Bontebok National Park	1 994	2 030	1 225	0	0	195	345	646	1 159	1 386	1 732	1 942
De Hoop Nature Reserve	1 999	1 707	1 171	0	0	126	308	424	506	379	279	766
De Mond Nature Reserve	1 249	853	293	0	0	0	98	177	586	516	0	1 307
Kogelberg Nature Reserve	1 124	655	575	0	0	0	478	589	1 207	595	595	1 555
Stony Point Nature Reserve	6 470	6 608	3 998	0	0	0	0	12	497	292	60	116
Cape Agulhas Lighthouse	3 916	2 174	1 415	0	0	0	0	0	0	0	0	0
Harold Porter National Botanical Garden	4 798	4 231	2 393	0	0	0	0	2 226	2 332	3 137	2 049	5 855
Shipwreck Museum	748	658	322	0	0	0	0	0	0	0	85	715

## 6. Cape Overberg 2020/21 Festive Season Performance Survey

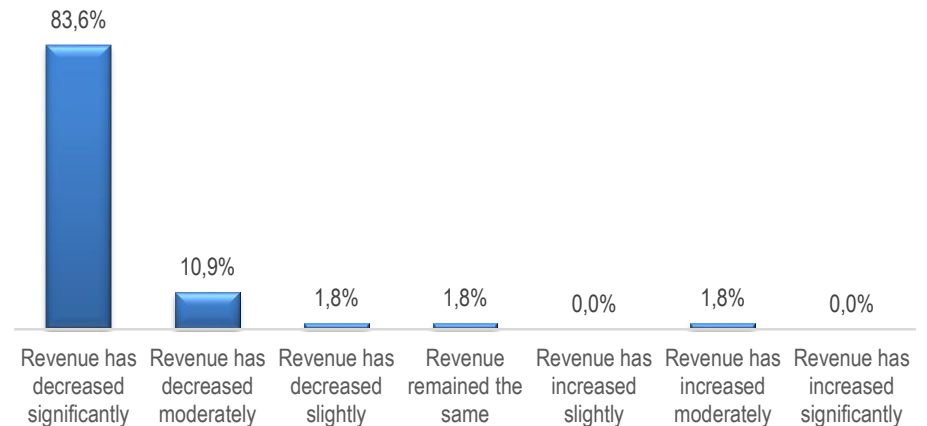
**BUSINESS CATEGORIES OF CAPE OVERBERG RESPONDENTS**



- On 15 March 2020, the South African Government declared a national state of disaster in response to the COVID-19 pandemic. A nationwide lockdown came into effect on 26 March 2020, resulting in border closures and a complete standstill in tourism activity until 31 May 2020.
- In line with governments risk adjusted strategy, limited tourism activity was introduced as of 1 June 2020, and international borders re-opened on 1 October 2020. However, stricter lockdown regulations were re-introduced in December due to a second wave of COVID-19 infections.
- The tourism industry was particularly affected by the closing of beaches and the ban on alcohol sales during this period.
- This report highlights the findings from a survey undertaken with tourism businesses in February 2021 to understand the effects that the COVID-19 pandemic and lockdown regulations have had on tourism in the Western Cape regions over the 2020/21 Festive Season.

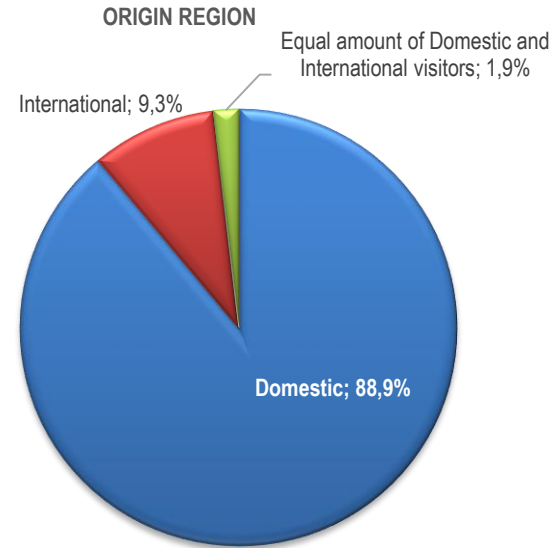
- A total of 441 tourism businesses across the Western Cape took part in the survey and 55 respondents were based in the Cape Overberg region.
- Majority of Cape Overberg respondents were in the accommodation (58,2%), restaurant (9,1%) and attraction (7,3%) categories. Respondents in the 'other' category included activities, winery and retail.
- Four fifths of respondents said that their revenue over the festive season had decreased significantly compared to the same period last year.

**IMPACT ON REVENUE (NOV 2020 – JAN 2021 VS. NOV 2019 – JAN 2020), CAPE OVERBERG**

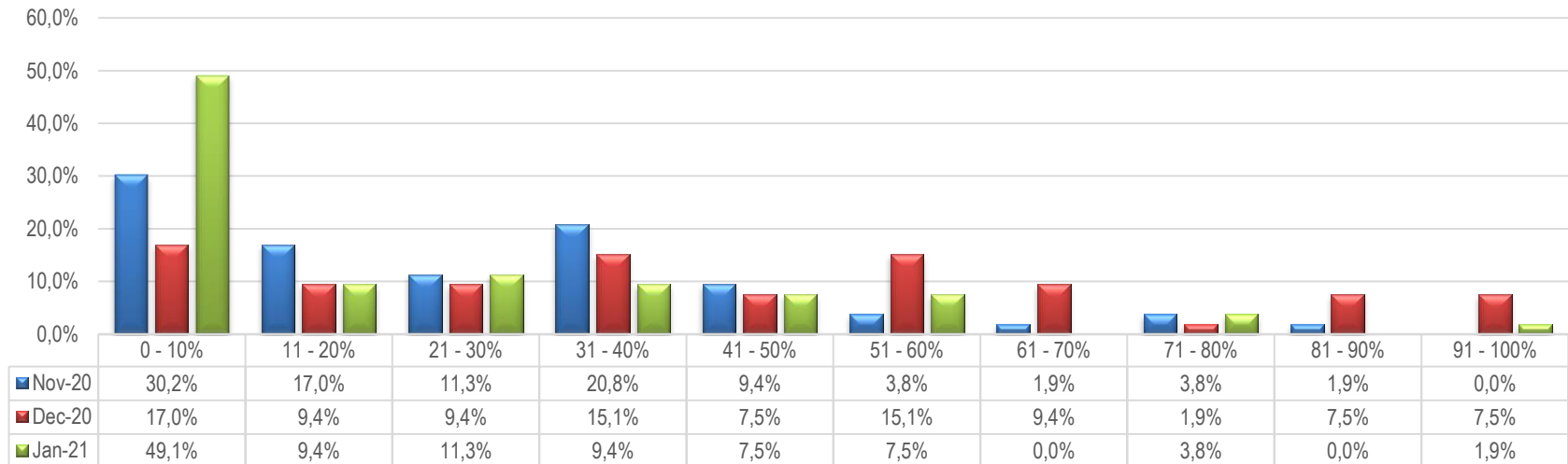


## 6. Cape Overberg 2020/21 Festive Season Performance Survey

- Close to 90% of respondents had visitors who originated from the domestic market and just about 10% had international visitors. A further 2% saw an equal amount of domestic and international visitors.
- Majority of respondents recorded occupancy percentages of 30% or less in November 2020 and January 2021.
- There was some relief in December 2020 with two fifths of respondents recording more than 50% occupancy.



**PERCENTAGE OCCUPANCY, NOV 2020 - JAN 2021**

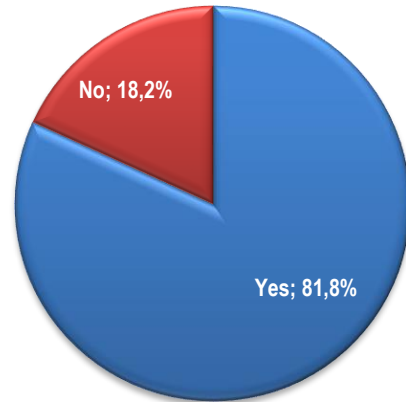


Q.3, 4 & 5. What was your percentage occupancy for November, December 2020, and January 2021?

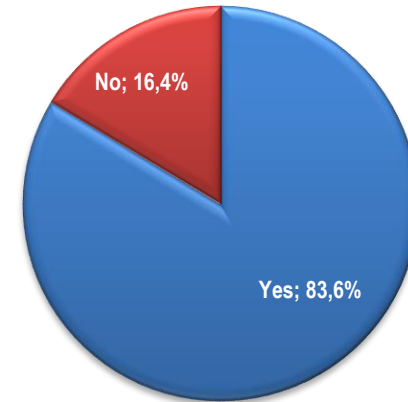
Q.6. Where were the majority of your visitors from?

## 6. Cape Overberg 2020/21 Festive Season Performance Survey

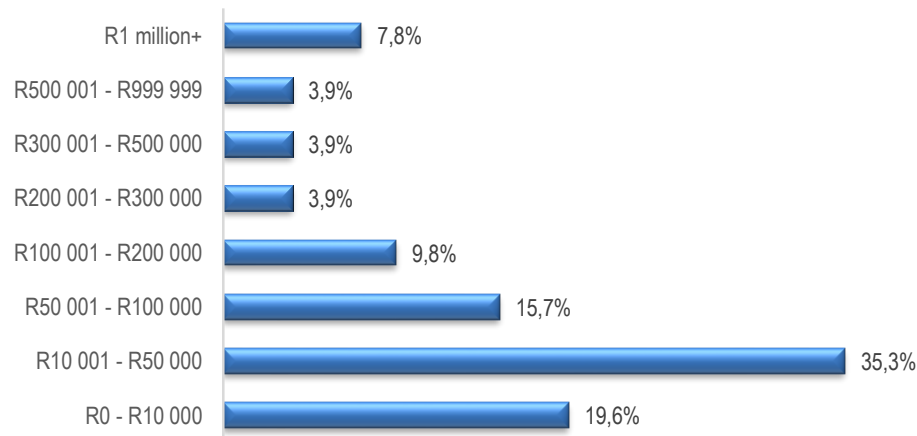
### OCCUPANCY/REVENUE LOST DUE TO BEACH CLOSURES



### OCCUPANCY/REVENUE LOST DUE TO ALCOHOL BAN



### ESTIMATED RAND VALUE LOST DUE TO CANCELLATIONS



- In mid-December 2020 stricter lockdown regulations were introduced as South Africa entered a second wave of coronavirus infections.
- The most notable restrictions were the closure of beaches and the ban on alcohol sales across the country, which lasted until 2 Feb 2021.
- Around 80% of respondents said that they had lost revenue due to the beach closures and the same amount lost revenue due to the ban on alcohol sales.
- In terms of rand value, a third of respondents recorded an estimated loss of between R10 000 and R50 000 due to cancellations and a further 15,7% had lost between R50 000 and R100 000.

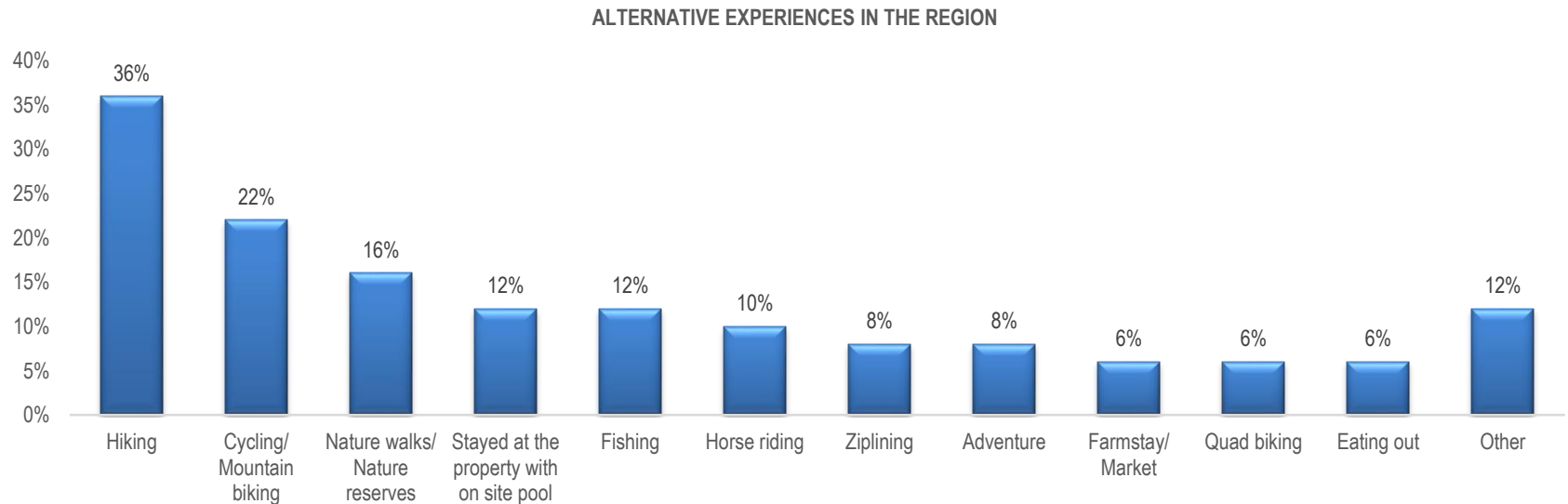
Q.7. After the 14th December announcement on BEACH CLOSURES, have you experienced a loss in occupancy/revenue?

Q.8. After the 28th December announcement on the ALCOHOL BAN, have you experienced a loss in occupancy/revenue?

Q.9. If you had cancellations, what is the estimated total Rand value lost?

## 6. Cape Overberg 2020/21 Festive Season Performance Survey

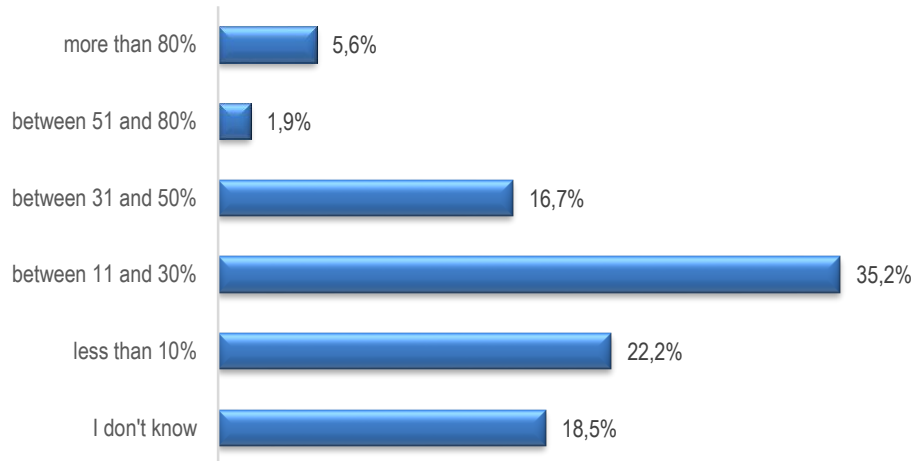
- Since the beaches were closed, visitors had to find alternate activities in the region. Hiking, cycling and mountain biking, taking nature walks or spending time in the Overberg's nature reserves, and fishing were among the most popular.
- Many visitors also opted to spend time just relaxing at their accommodation establishment. 'Other' activities included scenic drives or flights, archery, tractor rides and golf.



Q.11. Since the beaches were closed, please list some of the alternative experiences visitors enjoyed during their stay in your region

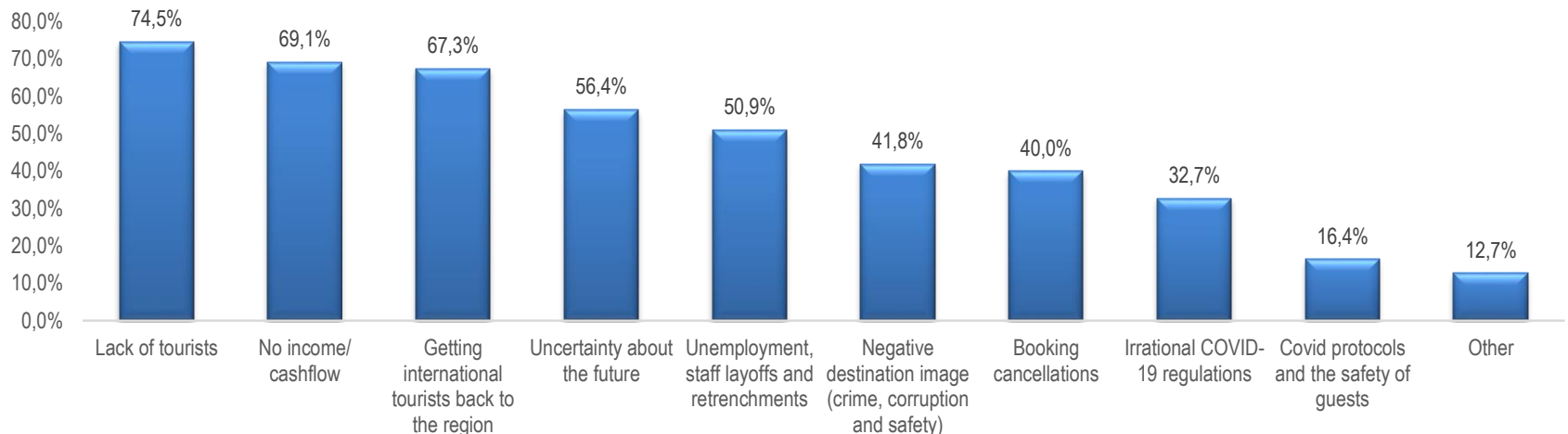
## 6. Cape Overberg 2020/21 Festive Season Performance Survey

### FORWARD BOOKINGS (MARCH TO DECEMBER 2021)



- The major concerns amongst respondents were lack of tourists, no income/cash flow and how to get international tourists back to the region. The uncertainty about the future and risk of staff layoffs and retrenchments were mentioned amongst half of respondents.
- Two fifths of respondents were concerned about the negative destination image portrayed via crime, corruption and lack of safety as well as booking cancellations.
- Looking ahead, respondents seem to be less optimistic about bookings for the remainder of 2021.
- A third of respondents said that they expect occupancy levels to be between 11% and 30% and 22,2% of respondents expect it to be less than 10% over the period March to December 2021.
- 18,5% of respondents indicated that they simply do not know what to expect which highlights the uncertainty associated with the pandemic.

### TOP FIVE CONCERNS



Q.12. What are your TOP FIVE concerns regarding your business and the tourism industry currently?

Q.13. Looking ahead, based on forward bookings, what is your occupancy expectation for Mar to Dec 2021?

## 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 and
- Stony Point
- Shipwreck Museum

*A special thanks to the participants in the Cape Overberg who took the time to complete the online survey.*

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