



# A Tourism Marketing Strategy

2018 – 2022

Updated 6 January 2022



Prepared by Frieda Lloyd

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## 1. EXECUTIVE SUMMARY

The Cape Whale Coast and Overstrand is the jewel in South Africa's tourism crown. It attracts a growing number of international and local visitors. Proximity to Cape Town International airport is a major advantage which makes the Cape Whale Coast a destination and a central point from where to commute for work or leisure. Tourism plays a momentous role in the Overstrand region and contributes significantly to job creation in the area.

Clarence Drive (the R44) is one of the scenic routes to follow to the Cape Whale Coast. This road bordered by the Hottentots-Holland mountains and the Atlantic Ocean has been voted as the most scenic in the world and cuts through the Kogelberg Biosphere Reserve, one of eight UNESCO World Heritage Site in South Africa with the highest number of plant species per hectare in South Africa. The route continues past Pringle Bay, Betty's Bay and Kleinmond to Hermanus, Stanford and Gansbaai. The abundance of fynbos species is world renowned, and botanists and visitors have admired and studied them since the seventeenth century. The Kogelberg Nature Reserve occupies an area with minimal human interference. Its exceptional diversity and quality of fynbos means it is considered the heart of the Cape Floral Kingdom.

The purpose of this document is to propose an integrated strategy. It builds a foundation to support industry to maximise its economic potential. Tourism contributes R17 billion to the region and creates 204 000 formal jobs in the province. Thus, this strategy – a living document - has been developed to provide direction for the growth and development of tourism in the Overstrand.

To develop and implement a world-class tourism marketing strategy for the Cape Whale Coast. In pursuance of this, Tourism aims:

- Attract more first time and more return visitors.
- Encourage visitors to stay longer.
- Develop and promote an event calendar.
- Facilitate strategic alignment of towns and industry – in support of the marketing of tourism.
- Improve the visitor experience.
- Broaden participation in tourism.
- Promote sustainable practices to develop as a responsible tourism destination.

- Continuously align efforts to support tourism growth; and
- Ensure the efficient utilisation of resources to deliver against the tourism strategy.

## **2. VISION**

For the Cape Whale Coast to be one of the top five preferred tourist destinations in South Africa and to maximise the economic potential of the tourism industry for our country and its people.

## **3. VALUES**

Our values are:

- Inclusivity and involvement of all tourism stakeholders including business, conservation.
- Transparent procedures and actions.
- Respect for our community and stakeholders.
- Acting with integrity.
- Accountability and consideration of the outcomes of our actions.
- Pursuing excellence in everything we do.

## **4. OBJECTIVES**

The Overstrand/Cape Whale Coast Tourism Strategy is focussed on sustained growth through:

- Marketing the Overstrand as a preferred leisure and events destination through coordinated promotion and communication efforts
- Optimise tourism volume and yield in sustainable manner by expanding the events market
- Promote an environmentally responsible tourism industry to benefit the whole community
- Improving visitor experiences
- Optimise distribution of tourism benefits
- Involve residents as a proud community of tourism ambassadors

## **5. LEGISLATION**

The following legislation is considered in all tourism activities.

- NATIONAL DEVELOPMENT PLAN (NDP) SA Tourism is entrusted with a critical mandate of contributing towards creating an environment for sustainable employment and inclusive economic growth through tourism. SA Tourism has specifically interrogated and aligned its role to the National Development Plan 2030.

- NATIONAL TOURISM SECTOR STRATEGY (NTSS) The NTSS was approved by Cabinet and launched in March 2011. It sets bold commitments for the tourism sector. The NTSS advocates the development of a Domestic Tourism Growth Strategy aimed at increasing domestic tourism's contribution to the economy. The achievement of the NTSS's objectives is dependent on a collaborative effort between government and the private sector.
- DOMESTIC TOURISM GROWTH STRATEGY (DTGS) The Domestic Tourism Growth Strategy (DTGS) outlines practical measures to address the lack of a tourism culture in South Africans – particularly from previously disadvantaged communities. The strategy is aimed at achieving set targets through education and awareness-raising across the country, as well as by promoting affordable and accessible travel and tourism opportunities.
- PROJECT KHULISA (till 2019)

This initiative from the Western Cape Department of Tourism is not very active due to lack of capacity and funding. KHULISA focus on the following:

1. Tourism

- Developing cultural and heritage tourism
- Focusing our marketing plans on a few, new specialised markets
- Boosting local business tourism

2. Agri-processing

3. Oil & Gas

- PARTICIPATORY APPRAISAL OF COMPETITIVE ADVANTAGE (PACA)

PACA is a set of tools designed by Mesopartner and introduced to the Overberg in December 2014. These tools are aimed at stimulating local and regional economies. PACA focuses on strengths and opportunities for quick economic results.

The key elements of this strategy are to: Inspire: authentically showcasing South Africa through her people, and how we can provide a unique and unforgettable experience; Engage: by communicating that the potential experiences one could have with South Africans are do-able and accessible to the traveller; and Convert: by conveying the message to travellers that tourist experiences in South Africa is beyond price and measure. To improve conversion, we will engage primarily with key trade and media partners in the source markets to activate travel to South Africa.

Gansbaai is the only active PACA participant with the Chamber of Commerce and Tourism Bureau working closely together.

- Overstrand Municipality Integrated Development Plan (IDP)

The IDP acknowledges that a healthy and vibrant economy is essential for the development of the local community. Tourism is identified as an important contributor to the Overstrand's economy and singled out as one of the fastest growing industries.

This thriving industry relies on good infrastructure and an educated work force. The Overstrand is focussed on changing the perception that tourism is an elite industry that benefits only a few. Tourism is helping businesses to align strategies to maximise the impact on poverty alleviation and development. The following tourism initiatives are aligned with the IDP: Business Tourism, Creative & Cultural Activities, Recreational Activities, Technology, Seasonality and, most importantly, marketing the destination through directed marketing campaigns.

## **6. IMPLEMENTATION**

The Mission, vision and objectives are considered through the following actions.

- 6.1** Marketing the destination
- 6.2** Monitoring and learning from tourist feedback on experiences
- 6.3** Collaboration with tourism organisations and stakeholders
- 6.4** Improved service levels, safety, product quality and pricing
- 6.5** Facilitating the removal of obstacles
- 6.6** Focussing on attractive and new markets

## **7. SITUATIONAL ANALYSIS**

**The Western Cape is South Africa's most developed tourism region.**

The tourism industry in the province has grown faster and created more jobs than any other industry. One in 10 employees in the Western Cape earns a living in the tourism industry, and it contributes more than R25 billion to the provincial economy.

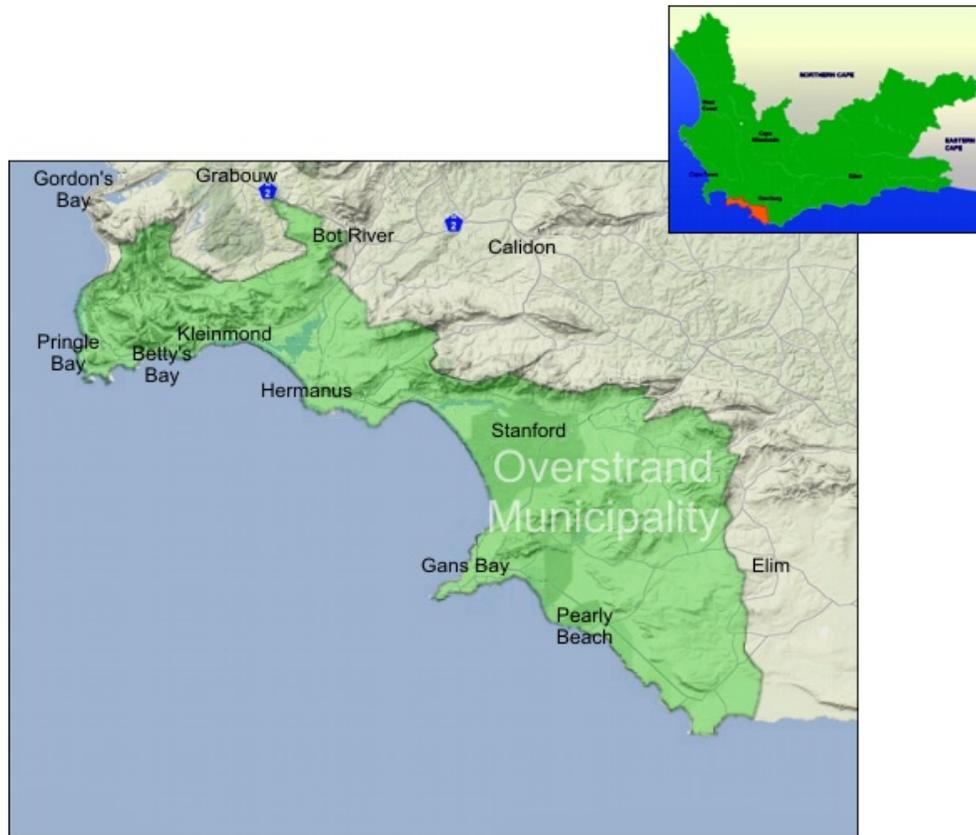
Cape Whale Coast Key attractions include:

1. Clarence Drive
2. Stony Point, Betty's Bay
3. Harold Porter Botanical Gardens, Betty's Bay
4. Kogelberg UNESCO world heritage site, Kleinmond
5. Blue Flag Beaches: Kleinmond, Hawston, Grotto. Pilot Blue Flag: Pearly Beach
6. Fernkloof Nature Reserve
7. Whale Watching – June till November
8. Stanford Heritage Village
9. Hermanus Wine Route
10. Stanford Wine Route

11. De Kelders – caves
12. Shark diving, Kleinbaai/Gansbaai
13. Eco adventure trips
14. African Penguin & Seabird Sanctuary, Gansbaai
15. Stanford Klein River
16. Rock art, Phillipskop
17. Panthera Africa
18. Natural beauty with fynbos cladde hiking trails and mountain bike routes
19. Cradle of Human Culture which includes Phillipskop Rock Art and Klipgat Caves.
20. Fynbos Route needs development. Link Cape Whale Coast with Cape Agulhas.
21. Walker Bay Hope Spot.
22. Overstrand UNESCO Creative City of Gastronomy.

## **8. TOURISM PRODUCTS, SERVICES, INFRASTRUCTURE & FACILITIES**

The municipality covers an area of 1,708 square kilometres (659 sq mi) stretching along the Cape south coast, from the eastern edge of False Bay almost to Cape Agulhas. At its western end it is separated from the City of Cape Town by the Kogelberg mountains; to the north it is separated from the Theewaterskloof Municipality by the Kogelberg and the Klein River Mountains; and to the east it abuts on the Cape Agulhas Municipality along a boundary that runs generally north-south just to the west of Elim. The western part of the municipality consists mostly of a narrow coastal plain with mountains immediately behind, while the eastern part beyond the [Klein River](#) expands away from the coast to include a wider agricultural region. The municipality's estimated population for 2019/20 as per the Annual Report of 2019/2020 was 104 985.



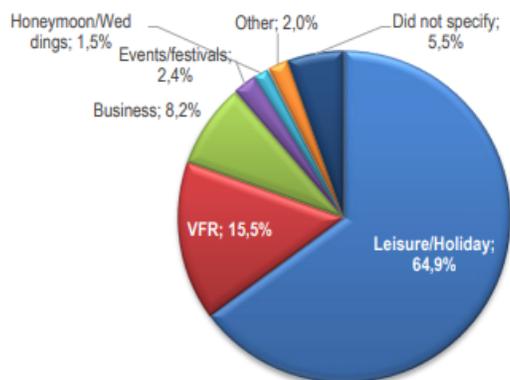
The Overstrand region includes the following towns with Visitor Information Centres (VICs):

- Hangklip-Kleinmond
- Hermanus
- Stanford
- Gansbaai

Each of these towns has its own distinct history, character, and assets. This area is currently marketed as the 'Cape Whale Coast' tourism route and is funded by Overstrand Municipality. The brand name 'Cape Whale Coast' is primarily intended to create international and national exposure for an array of tourism products on offer in the Overstrand by promoting the area's icon product: *the southern right whale*. It encapsulates other species of whales also present along the coast and frequently sighted.

The Cape Whale Coast offers some countless tourism activities, attractions, events, accommodation facilities, wineries, golf courses, art galleries, shops, restaurants and country markets. Activities favoured by visitors include whale watching, shark-cage diving, hiking, golf, wine tasting, mountain biking, fynbos and bird viewing. We are proud to have five Blue Flag

beaches in our region (as at 2021/2022 season): Grotto, Hawston, Pearly Beach, Onrus and Kleinmond beaches. Onrus Beach received Blue Flag status for the first time for the 2021/2022 season. Main tourism attractions include Stony Point (African penguin colony), Harold Porter Botanical Gardens, Kogelberg Biosphere, Fernkloof Nature Reserve, Cliff Paths, Hermanus and Stanford Wine Routes, Whale watching (by land and boat), marine big five experiences and shark cage diving in Gansbaai.

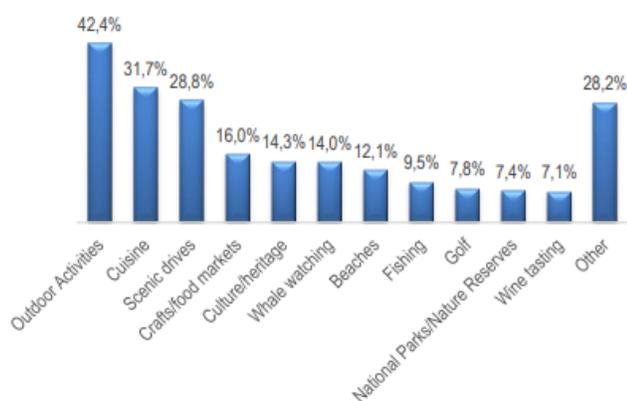


\*Other: Includes travel for education, religion, health & wellness, seasonal/migrant work, and sport.

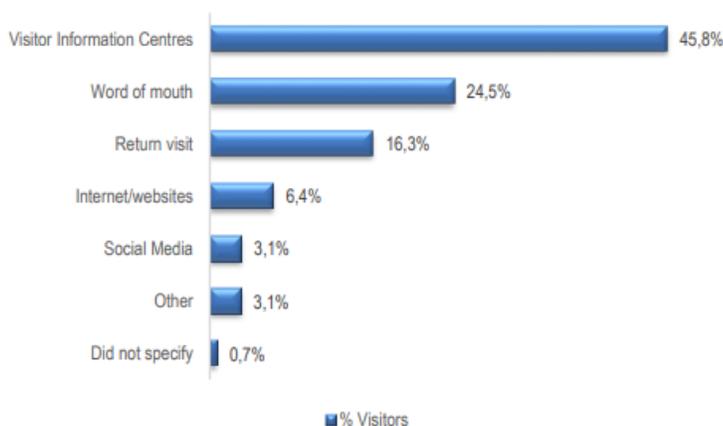
- The most prominent motivating factor for travel to the Cape Overberg was for the purpose of holiday/leisure (64.9%).
- Visiting Friends and Family (VFR) (15.5%) and Business (8.2%) ranked as part of the top three reasons for visiting the Cape Overberg region.
- Outdoor activities (42.4%), cuisine (31.7%) and scenic drives (28.8%) were the top three activities undertaken in the region.
- Activities under the 'other' category included adventure, business, birding, health & wellness, shopping, flowers, cruises, sporting events, shark cage diving, events, cycling, expos/exhibitions, game reserves, and gambling. .
- Visitor Information Centres (45.8%), word of mouth (24.5%), and return visit (16.3%) were the top 3 sources used by visitors to gather information about the region.

The image above is an excerpt of Cape Overberg Visitor Trends Jan – June 2021 as compiled by Wesgro with information supplied by the 4 Overstrand VICs. With the images below showing activities and information sources as per the same document.

#### 4.6 Top Activities Undertaken in the Cape Overberg



#### 4.7 Top information sources



As with the Western Cape tourism is a significant industry for the Cape Whale Coast. It helps to fund critical infrastructure and provide people to people linkages to international interests.

Herewith a brief introduction of the existing tourism sectors:

<p><b>Accommodation</b>  Accommodation ranges from 1 to 5-star backpackers, self-catering houses, luxury guesthouses and hotels  Caravan parks &amp; camping grounds (Palmiet, Onrus, Kleinmond, Platbos)</p>	<p><b>Cultural</b>  Heritage buildings and San rock art, Stanford Art galleries in Onrus, Stanford, Hermanus  Whale Museum, Hermanus  Cradle of Humankind: Klipgat Caves &amp; Phillipskop Mountain Reserve</p>
<p><b>Nature-based - hiking, cycling, exploring, flora &amp; fauna, water sports, canoeing, etc</b>  Whale watching (by boat or land)  Mountain biking      Bird watching  Hiking (Fernkloof, Kogelberg Biosphere, Gansbaai)  Kayaking, River rafting on Palmiet &amp; Klein Rivers  Glam Trails hiking in Hemel-en-Aarde vineyards.  Hiking trails on Bosman and Bouchard Finlayson.  River Cruising on Klein River, Stanford.  Surfing, kite surfing, swimming in ocean</p>	<p><b>Entertainment</b>  Restaurants and cafes  Pubs/bars/night clubs in Hermanus  Sports and social clubs  Breweries (Hermanus, Gansbaai and Stanford)  Distillery (Stanford)</p>
<p><b>Points of interest</b>  Dangerpoint Lighthouse  Baardskeerdersbos  Stony Point  Kogelberg Biosphere  Fernkloof Nature Reserve  Cliff paths and Hoy's Koppie in Hermanus  Heritage buildings in Stanford  Wild horses in Kleinmond  SANSA Space Centre  Hermanus &amp; Stanford Wine Routes  Harold Porter Botanical Garden</p>	<p><b>Other attractions/activities</b>  Shark cage diving in Gansbaai  Whale watching in Gansbaai and Hermanus  Golf (Arabella, Hermanus)  Birkenhead Brewery  Klein River Cheese Farm  Abalone farm, Abagold  Harbours: Kleinmond, Hermanus and Gansbaai  Adventure activities in Hemel-en-Aarde  Hermanus Wine Hoppers  Shark Lab</p>
<p><b>Major conference and special event venues</b>  Municipal auditorium/Civic centre  Arabella conference venue  Grootbos Private Nature Reserve  Fernkloof Nature Reserve  Sandbaai Hall  Bona Dea Private Estate  One Heaven &amp; Earth, Crystal Kloof,  Murasie and De Uijlenes, Gansbaai  Several smaller private venues at hotels or other establishments.</p>	<p><b>Infrastructure and facilities</b>  Educational facilities institutions: Learn2Earn, Overstrand Training Institute, Enlighten Education Trust  Mthimkhulu in Kleinmond  Sportsgrounds  Hawston and Mount Pleasant swimming pool  Several private schools  Private and government hospitals  Oncology Centre, Hermanus</p>
<p><b>Services</b>  Car Hire, Transport Services  Hermanus Wine Hoppers  Information offices/local tourism bureaus  Informal taxi busses travelling between towns  2 aeroplanes for whale watching trips  Tour operators /shuttle services</p>	<p><b>Retail/Shopping</b>  Kleinmond Harbour Development  Old Town of Hermanus (antiques, art galleries, etc)  High Street &amp; Harbour Road Hermanus  Whale Coast Mall, Sandbaai  Queen Victoria Street Stanford</p>

## 9. TOURISM PERFORMANCE

Tourism is a major economic driver for the Overstrand and plays an important role in the social, cultural and economic vibrancy of the Overstrand. The effect of tourism is not limited to the accommodation, cafes & restaurants, retail and personal services sectors; the indirect financial and employment benefits filter through to all industries.

Key visitation findings of the 2011 Tourism Barometer (data relates to the 2010/2011 calendar year), done by PriceWaterhouseCoopers indicated that the Overstrand economy has had a positive growth in the past few years, contributing 40% of Gross Domestic Product (GDP) in the Overberg, and contributing to approximately 5757 jobs within the tourism sector of the Overstrand. Tourism can therefore be recognized as a leading business sector for the Overstrand region, giving us a competitive advantage over other regions, alongside business sectors like agriculture and aquaculture.

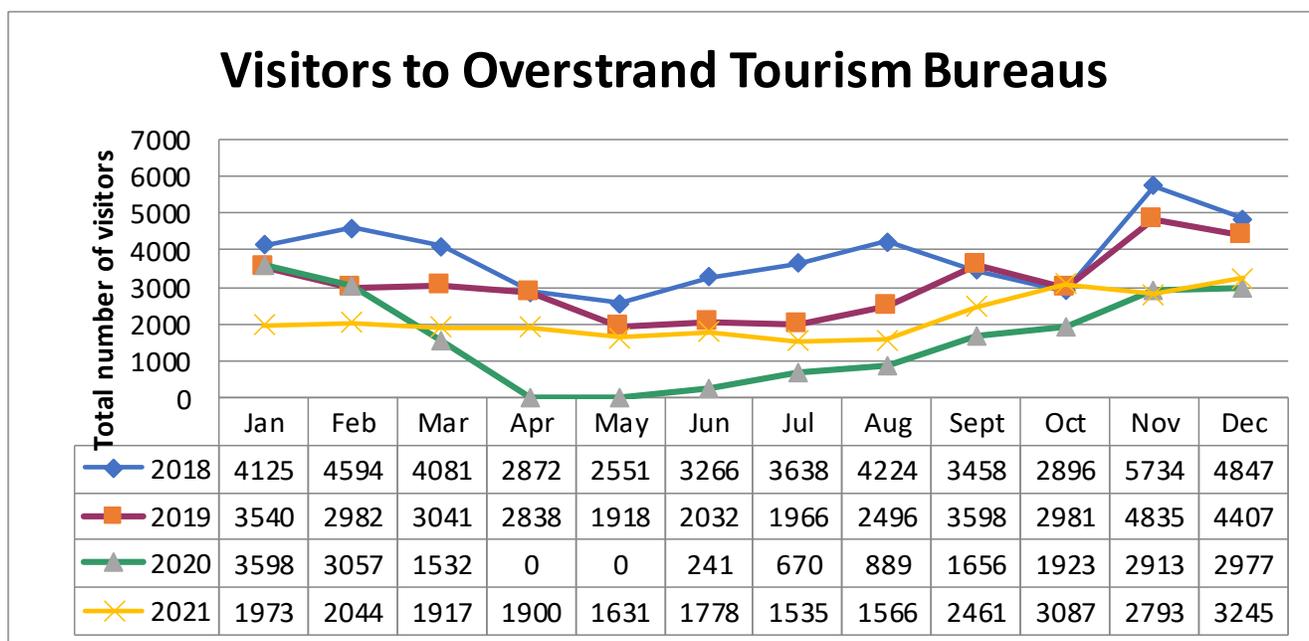
Wesgro's Tourism Barometer reports states that the main purpose of visit to the Overberg region was for holiday, leisure and visiting friends and relatives. Cuisine (gastronomy) has grown as a popular purpose of visit to the Cape Overberg with many fine restaurants, wineries, breweries and distilleries in the region.

Main activities undertaken by tourists have been rated according to the level of interest:

1. Scenic Drives – Great Ocean Drive, Clarence Drive.
2. Nature: Fernkloof, Kogelberg Reserve, whale watching – (land, sea & air), Blue Flag Beaches, bird watching, conservation agencies
3. Food & Wine – Hermanus & Stanford Wine Routes, Lomond Wines, Gansbaai, Olives, Abalone tour and tasting, beer breweries and tastings, coffeeshops and roasters, distilleries.
4. Science – SANSA, Marine Research (sharks & whales), Wave Energy, Astronomy
5. Arts – First Friday, Baardskeerdersbos Art Route, Hermanus FynArts Festival, Hermanus Art in the Park.
6. Adventure – Hiking, Shark cage diving, mountain biking, trail running, ziplining, kite surfing, surfing
7. Visiting other Overberg towns

There are distinct visitor patterns to the Overstrand; approximately two thirds of all visits are made between November and March. Lower occupancies can be experienced during the months May, June and July when this area receives winter rainfall.

Overstrand Municipality's Tourism Department receives monthly visitor statistics from the four tourism bureaus in the Cape Whale Coast. These statistics are forwarded to WESGRO for inclusion in their quarterly tourism barometer. Please note that the figures below is not a reflection of the total visitor figures to tourist attractions or car count to the Cape Whale Coast towns, but only reflects the number of walk-ins to the tourism bureaus. The monthly break-down of visitor numbers for the period 2012- 2018 to all four tourism bureaus reflected as follow:



**Attractions' performance in the Overstrand/Cape Whale Coast:**

Wesgro's Tourism Barometer, indicating visitor statistics for the Overberg and shows that the Cape Whale Coast/Overstrand performs very well in comparison to the other sub regions of the Overberg.

In summary, the visitor statistics for Cape Whale Coast's attractions are:

- 79 690 guests visited Stony Point during 2016, 79149 in 2017, 73 369 in 2018, 84 088 in 2019, 18 053 in 2020 and 30 134 in 2021.
- 62 153 guests visited Harold Porter Botanical Gardens in 2016, 61 355 in 2017, 60 423 in 2018, 42 282 in 2019, 2904 in 2020 and 42 037 in 2021.
- 24 226 guests visited Kogelberg Nature Reserve during 2016, 8 705 in 2017, 10 688 in 2018, 8 133 in 2019, 9 393 in 2020 and 10 527 in 2021.
- 64 405 guests visited the Old Harbour Museum complex in Hermanus from April to Dec 2012.

- Onrus Camping Site: 1 142 bookings from 1 July 2018 – 30 June 2019. Avg 4 persons per booking. 4 568 campers. Dec/Jan 2021/2022 155 stands booked at 50% capacity. 620 campers.
- Palmiet Camp Site: Dec/Jan 2021/2022 71 stands booked at 50% capacity. 284 campers.
- 68 000 guests visited Creation Wines in Hemel-en-Aarde Hermanus from Feb 2019 – Feb 2019

Shark cage diving statistics (obtained from Kleinbaai Harbour) indicated that 85 000 visitors went on shark cage diving/viewing excursions in 2016 compared to 63 635 visitors during 2012.

## 10. SWOT ANALYSIS

STRENGTHS	WEAKNESSES
Best land-based whale watching in the world. Known for its Whale Festival (strong brand).	Inappropriate tourism facilities (parking for busses, tourism bureaus not always visible, signage not clear)
Scenic natural beauty: nature reserves, biosphere,	Social Discourse
Marine Life & Blue Flag beaches	This area attracts mostly day visitors
Diverse offerings/attractions: nature, golf, wine, whale watching	Limited opening hours of businesses
Clarence Drive – one of the most scenic drives	Not many activities offered for the youth
Hermanus has an international profile as the Whale Capital	Staff working within tourism industry do not have necessary skills/training
Outdoor and adventure-based activities: shark cage diving, mountain-biking, quad-biking, diving, ziplining, trail running, surfing, hiking.	Not sufficient road signage to attractions or places of interest
Within close proximity of Cape Town and international airport.	Perception of expensive destination
OPPORTUNITIES	THREATS
Excellent development and packaging possibilities with special interest markets, including eco-tourists, hikers, bird watchers, golfers, space enthusiasts	Seasonality: high summer period puts strain on municipality services (water, congested parking). Pandemics, travel bans, curfews, restraints on liquor trading.
Improved service delivery	Safety & security of visitors. The closing of shops during unrests, accumulation of uncollected refuse.
Growing demand for domestic tourism	Economic decline, volatility in fuel prices and inflation might have an impact on guests visiting patterns. Affordability of attractions for locals.
To improve visitors' service experience by offering training opportunities to the hospitality industry	Competition of other nearby towns/regions within close proximity of Cape Town which offer better value for money.
Development of festivals and events as additional attractions	Overstrand Municipality's capacity limitations
Infrastructure for business tourism should be developed (more affordable venues, conference facilities)	Perception that the Overstrand is too far away from Cape Town.
Opportunities for a major interpretive centre related to marine life.	Ignorance regarding operating standards and regulations on part of operators (unlicensed vehicles and illegal guides);
Unlocking of value for residential and subsequent community upliftment.	Probability of a toll road on the N2-road Road closures due to social disorder.

## **11.TARGET MARKETS & MARKET SEGMENTATION**

According to Wesgro's statistics, the Cape Whale Coast received most of its domestic visitors from the Western Cape and Gauteng. The biggest percentage of domestic visitors originates from the Western Cape.

From July to September 2016 the Cape Whale Coast received the highest proportion of visitors from the international market. The top three source markets were the traditional markets such as the United Kingdom, Germany and the Netherlands. The United States source market has increased substantially over the past year.

Overseas and domestic visitors to the Cape Whale Coast prefer to travel in groups of pairs or in groups of four. Domestic visitors prefer to travel alone (39.7%) mostly as business tourists due to the high growth of single travellers.

Overseas and domestic visitors prefer to stay one to two nights.

January to December 2019 the visitor trends were as follows:

- 59% international visitors, 41% South African visitors
- 71% of the SA visitors came from Western Cape
- 81% were overnight visitors
- Biggest source markets: UK, Germany, Netherlands, France
- 46% stayed 1 night, 17% stayed 2 nights

Overstrand Municipality's international marketing strategy is closely aligned to the marketing efforts of SA Tourism who has the primary responsibility for marketing South Africa internationally. To this extent Overstrand Municipality ensures that its marketing efforts are focused on the core markets and market segments identified by SA Tourism. The objective is to gain maximum leverage for the area in these core markets. This is to be done through continued collaboration with SA Tourism offices worldwide, partner organisations and SA Embassies in all important markets. Penetration of the European, UK, Indian and Chinese markets attempts to secure brand awareness to more countries.

Market Segmentation recognises that people differ in their tastes, needs, attitudes, lifestyles, family size, and composition, etc... "It is a deliberate policy of maximising demand by directing marketing efforts at significant sub-groups of customers of consumers" (Chisnall, 1985: 264).

Segmentation enables Cape Whale Coast Tourism to focus marketing on the customers who will be most likely to buy the services that are on offer.

- Enhanced profits for business.
- Helps improve customer service.
- Kick-starts competition in specific parts of the market.

Cape Whale Coast has an obligation to foster a sustainable tourism industry and provide a more inclusive base of tourism participation.

## 1. Demographic

Understanding demographics is vital to service/product development and segmentation, especially with regard to understanding trends in the marketplace. Demography includes the study of age, sex, education, family status, life cycle etc., which acts as an excellent tool to attract more tourists and travellers to our region. Statistics indicated in 2019 that 30% of visitors were between 36 and 50 years old and 22.5% were between 51 and 70 years old. It has been noted that the Cape Whale Coast is a family destination, also popular with groups, executives for training and wellness retreats.

### 1.1 Lifecycle:

#### 1.1.1. The Youth Market:

They have lower than average incomes, high energy approach to travel; they are more likely to undertake “backpacker tourism, adventure sports, and other activities on offer that generate high adrenaline.

1.1.1a. Nature is the most appealing experience to youth travellers with high appeal in all markets. The Cape Whale Coast's fynbos, its scenic beauty acts as a perfect getaway and holiday destination for youth of this generation. There is a lot offered like sea, sand, sun, surf, zip lining, kitesurfing, etc., which attract youth's and also see to it that they are connected to nature and still maintain the ecology.

1.1.1b. Coastal Lifestyle experience is also very appealing to youth traveller. It portrays a very classic outdoor lifestyle and provides a whole lot of fun and thrill at the same time. Travellers get to meet new people, mix and learn the lifestyle of the locals and enjoy the fun environment the destination has to offer.

1.1.1c. Culture is of moderate appeal to youth traveller. Not many are interested in undertaking this segment of tourism. It calls for less interaction and very minimal socialising, whereas youth prefer the opposite.

1.1.1d. Food & Wine are becoming more appealing to youth travellers and are currently perceived as being unique. While the outdoor, relaxed nature of this experience also has appeal, in general it is seen as an expected element of a holiday. There is an opportunity to promote accessible and affordable quality food & wine experiences to the youth market. There are opportunities to reposition these experiences for the youth market to make them more relevant to this segment.

#### 1.1.2. The Family Market:

The family market constitutes of the above average education and income, most affluent of the other lifecycles and one that dominates the Cape Whale Coast market segment. They tend to be shorter-haul travellers because of their busy lifestyles work and also are mostly accompanied with children. Most of the travellers falling under this category of the market focus on soothing vacation holidays, so that they are rejuvenated after a hectic schedule of work and life and are ready to get going till the next vacations.

#### 1.1.3. The Mature Market:

Mature-aged travellers are defined as either domestic or international visitors aged 55 years and over. They are well educated and affluent and more likely to seek out exploratory vacation activities. Most travellers in this segment of lifecycle segmentation are more likely to visit destinations and other attractions for either exploratory or research work.

#### 1.1.4 The Senior Market:

The senior market consists of travellers are likely of all the above segments to seek out exploratory vacation experiences, much less likely to view vacations as opportunities for relaxation. Above average participation in natural sightseeing, they will be less active in outdoor activities. They rely more on printed material and television for travel opportunities and information. Although they might be the smallest segment, special attention should be paid to the seniors' market, as its members look for exploratory experiences and prefer value-added components such as guided services.

## 2. Psychographic

This type of segmentation divides the market into groups according to customers' lifestyles. It considers several potential influences on buying behaviour, including the attitudes, expectations, and activities of consumers. The main types of psychographic segmentation are lifestyle (different lifestyle patterns), Activities, Interests and Opinions (AIO).

Purpose of visit classification enables identification of the nature of the visitor base and to plan activities accordingly. It also enables the identification of geographical/seasonal variations in tourism by purpose.

The following are the various sub-segments and niche markets classified:

## 2.1 Interests (Trip Segmentation or Activity Segmentation)

### 2.1.1. Backpacker Tourism:

International backpacker visitation has continued to increase by approximately 3% per year since 2000 to reach 566,000 visitors. There were 500,000 domestic backpackers in 2007 states Backpacker Snapshot, 2009.

Spending more time in South Africa, these travellers tend to explore considerably more of the country. Many backpackers participate in working holidays enabling them to stay longer in the country.

### 2.1.2. Education Tourism:

An education tourism visitor can be associated as an international traveller whose main reason for visiting is education and length of stay is less than twelve months.

This is a very attractive segment that was put forward in collaboration with tourism boards of other territories in the country, since South Africa is one amongst the leading education grounds for many international students especially marine and wildlife students.

### 2.1.3 Taste and Try:

Travellers coming as “learners” are inexperienced travellers attracted to “trendy” well known destinations in and around the Cape Whale Coast, like Cape Town and Franschhoek. They highly depend on recommendations from experienced travellers, usually visit destinations with numerous attractions; they look out for sun, sea, sand, and nightlife. The top travellers of destination motivation for the Taste & Try segment include friends who have visited and also to visit family who live at the destination.

### 2.1.4: Roots- Exploring the heritage

Travellers under this segment travel to places that they feel a connection to, through heritage. Travelling may include with or to visit friends and family. Most travellers under this segment show keen interest in to learn the local languages and are very concerned about various threats that the destination or country as a whole faces.

### 2.1.5: Adventure Tourism:

The sub- segment of Adventure Tourism has helped to grasp a whole lot of travellers to come to the region and indulge in the various adventure sports and activities, which bring significant gains to regional and national economies.

### 2.1.6 Business Tourism:

Business tourists spend more money per night than holiday visitors. Their main mode of transport is air and car hire resulting in high yield for the car hire industry and the airlines. These visitors provide improved business communication and help to promote products and services overseas. This in turn generates additional income and employment within the region.

Research stated that business tourism is a very important high yield sector of the tourism industry.

### 2.1.7 Indigenous Tourism:

Indigenous tourism is defined as participating in an activity that gives Indigenous people the chance to tell their story, in their way, sharing cultural insights, traditional practices and contemporary concerns with non-indigenous South African and international visitors.

The rise in the number of visitors looking for indigenous/community tourism is because of the appropriate segmentation and the marketing the specific program to the right target markets.

The Cape Whale Coast uses geographical- focuses on domestic tourists and visitors as well as international tourists and visitors. Cape Whale Coast to design special marketing programmes that focus entirely on domestic tourism and others on specific international markets.

The best and most efficient segment that Cape Whale Coast Tourism derived and uses it to its fullest is the Psychographic segmentation, with dedicated significance on visitor's interest. Various segments like, ecotourism, spa and wellness tourism, wedding/romance tourism, beach tourism, golf tourism, adventure tourism and other such sub segments and types of tourism were created keeping in mind the previous year's data and facts. Based on research and results, these segments were derived at which proved to be beneficial in terms of monetary benefits as well as benefits to the visitor, where in they can easily identify their preferred segment.

## **12. STRATEGIC RELATIONS**

Partnerships and collaboration is essential to ensure that opportunities and resources are maximised. Strategic partners include:

- Regional and Local Tourism Organisations
- SA Tourism (and their country offices worldwide)
- Wesgro (Western Cape Destination Marketing, Investment and Trade Promotion Agency)
- Western Cape Department of Economic Development and Tourism (DEDAT)
- SA embassies
- Sporting/Service Clubs & community organisations
- Training institutions
- Business Chambers

- Event/Festival organisers
- Property developers, investors
- Media

### **13.INDUSTRY STRUCTURE**

Wesgro, the provincial Destination Marketing, Investment and Trade Promotion Agency, is responsible for marketing the regions of Western Cape internationally. The Overberg is one of the six tourism regions – the others are West Coast, Winelands, Garden Route/Klein Karoo, Central Karoo and Cape Town.

Within the Overberg region, Overberg District Municipality is divided into the local municipalities of Swellendam, L'Agulhas, Theewaterskloof and Overstrand. Overberg District Municipality's tourism function is to promote local tourism for the district, yet minimum funding is available to do tourism marketing for the Overberg as region.

Overstrand Municipality provided funding, in the form of a grant, to four local tourism bureaus located in the Overstrand. These are: Hangklip-Kleinmond, Hermanus, Stanford and Gansbaai Visitor Information Centre, which play an information and visitor services role in the various towns. As a result, the four Visitor Information Centres were invited to participate in destination marketing activities and tactical campaigns on a project basis. Visitor Information Centres operated autonomously until 2020 when they were incorporated under the management of Overstrand Municipality's Tourism Department, Cape Whale Coast Tourism. The Overstrand Municipality promotes the Cape Whale Coast/Overstrand area as a region. Marketing activities of Visitor Information Centres are undertaken in collaboration and conjunction with the Cape Whale Coast as budgets are limited. Visitor Information Centres used to generate income through membership fees, commissions received on all bookings, sponsorships and the municipal grants.

Considering the aforementioned, the industry structure looks as follow:

Local: Gansbaai, Hangklip-Kleinmond, Stanford and Hermanus Visitor Information Centres

Sub region: Cape Whale Coast/Overstrand Municipality

Regional: Overberg

Provincial: Wesgro

National: SA Tourism

## 14. INSTITUTIONAL ARRANGEMENTS

It is necessary for Overstrand Municipality to prioritise the recruitment of adequate and competent staff to drive tourism as well as consistent tourism planning coupled with adequate budget.

The marketing plan will illustrate that a staff component of at least three persons will be required to operate and provide services to promote the Cape Whale Coast optimally:

- 1 Cape Whale Coast Tourism Manager responsible for destination marketing, development of tourism marketing toolkit, broadening participation, supporting events and festivals, liaison with government departments.
- 1 x Tourism Officers: one focusing predominantly on procurement and training
- 1 x Marketing Officers: responsible for implementation of tourism marketing toolkit.
- 2 x Tourism Administrators: responsible for overseeing activities in the 4 main towns

There should also be opportunities created for volunteers or interns to undergo practical experience, although the successful operation of the Tourism Department will not rely solely on volunteer support.

The Tourism Manager is required to drive and facilitate the effective implementation of the marketing strategy. This person manages partnerships and engages with the trade and other key stakeholders to ensure that marketing activities are successfully implemented. Management of communication, data collection, research and marketing projects will be the responsibility of the Tourism Manager.

## 15. KEY STRATEGIES

### 15.1 KEY STRATEGY AREA 1: Optimise and Enhance the Destination Brand

The PricewaterHouseCoopers Tourism Barometer-report (published in 2011) objectively indicated that the industry is comfortable with this region to be branded as '*Cape Whale Coast*'. Discussions with individual tourism office managers also indicated a positive response towards the naming of this region as '*Cape Whale Coast*'. One should keep in mind that to establish a brand it will take a considerable amount of time - on average three to five years. There will be significant future costs involved should the name of this region need to be changed, as road signage, marketing collateral, etc needs to be changed. When it comes to marketing this region at international platforms, the English word "*Cape Whale Coast*" is

more easily understood and descriptive of one of the main and unique attractions, whale watching, which can be enjoyed in this area.

The Cape Whale Coast brand has been designed to incorporate the names of the four towns (Hermanus, Hangklip-Kleinmond, Gansbaai and Stanford) in the logo design. By naming the towns within the region, it gives it a sense of place. It will be important to also establish partnerships with other well-established brands/properties (such as CapeNature, Arabella, Grootbos) and the industry in general to better promote this area. The Cape Whale Coast should in no terms compete against the Hermanus or Gansbaai-brands as these are established brands, but it should be seen as an umbrella brand endorsing the sub-brands.

The logo is a visual statement about Cape Whale Coast's identity which communicates our philosophy.

This is an enduring symbol of how we view our destination. Our icon represents a whale tail as the area is known for its many whale watching opportunities, the red represents the wine routes (pinot noir) while the green represents fynbos, nature reserves and botanical gardens.

The correct colours and design of the Cape Whale Coast brand and artwork should be applied appropriately on all promotional items, advertisements, and publications.



Hangklip-Kleinmond | Hermanus | Stanford | Gansbaai

Red – pantone C16, Green C60 and Blue C100

## 15.2 KEY STRATEGY AREA 2: Improve visitor information services and visitor experience

Two critical factors are necessary to improve information services and enhance visitor experience: firstly, proper institutional arrangements are vital to ensure a well-coordinated value chain in terms of properly manned visitor information offices. On the other hand, the participation of tourism stakeholders in providing products and services is important.

Regular tourism awareness programmes, in close collaboration with national, provincial, district and local tourism partners, will be fundamental to improving service standards and

developing a tourist friendly culture. It will be vital to strengthen our relationship with members and build partnerships with private and public enterprises.

Collateral material should be developed for the region (maps, brochures, photographs), packaging of different interactions to enhance the visitor's experience and knowledge about the area. By linking towns and their information, visitors' choices will be expanded, as will, hopefully, their stay and spend in the area. Enhance visitor experiences by the training and upliftment of the local community to ensure that service levels are addressed.

The consideration should be beyond the Overstrand's boundaries with linkages to other regions (such as Stellenbosch, Franschhoek, Mossel Bay) in order to build collective strength and a sustainable product. These types of linkages with other towns and regions would enable Overstrand to capitalise on the growing trend of tourists travelling into hinterland areas, and crossing borders, whilst seeking more diverse and unique experiences.

### **15.3 KEY STRATEGY AREA 3: Destination marketing activities targeting specific markets**

A dynamic website used as a very important information marketing tool. Visitors to the site are able to interact and navigate to find all relative tourist information on a website. Seeing that Cape Whale Coast do not have members, the website should drive more traffic to the tourism Visitor Information Centres websites for bookings. High quality images, footage, press releases and informative content such as the publication of research reports, are used.

Targeted e-marketing campaigns can be considered to drive more traffic to the website or social media pages. The tourism website and our social media platforms (Facebook, Twitter and possibly Instagram) could act as key mechanisms for the distribution of tourism information.

Identify strategic joint marketing partnerships with local and international partners in order to increase the number of visitors to the Western Cape. Cape Whale Coast participates at strategically selected consumer and trade marketing platforms to target core markets and host media or trade groups to the area. Marketing collateral is developed to target specific markets, for example an Outdoor Activity map, birding map, etc.

Development of marketing campaigns to address seasonality and use of events as a spin-off for campaigns during off-season times. Collaborate and work with SA Tourism, WESGRO and other regional tourism offices to disseminate destination collateral cost effectively.

Social media sharing is the most significant factor affecting tourism marketing. It benefits the industry through the sharing of travel memories with a vast audience. This attracts new travellers far more than advertisements and encourage people to share their real experiences online. The rise of social media importance assists with two-way communication between destinations and customers and customers to customers. Cape Whale Coast benefits from this impact of social media with a focused and strategic communications calendar. The following are the different social media platforms maintained by Cape Whale Coast Tourism and the Visitor Information Centres.

				
	whalewatchingsouthafrica	whalecoastsa	@whalecoastsa	#capewhalecoast
	Hangklip-Kleinmond-Tourism	kleinmondtourism	@hangklipT	#kleinmondTourism#HangklipT
	Hermanus-Tourism_Bureau	hermanustourism	@HermanusTourism	#myhermanus#hermanus
	standfordtourism	visitstanford	@HermanusTourism	#visitstanford#stanfordtourism
	Gansbaai-Tourism	gansbaai_tourism	@GansbaaiTourism	#Gansbaai

#### 15.4 KEY STRATEGY AREA 4: Research and analysis

There needs to be an urgent prioritisation of tourism data collection which will assist Overstrand Municipality in better planning and policy making. For this effort to succeed tourism role players there needs to be committed to share and participate in studies conducted by the Municipality and tourism VICs.

Continue to produce the Tourism Barometer, or alternatively consolidate visitor numbers/statistics of tourism bureaus, attractions, and tourism businesses. Mechanisms need

to be developed which can monitor performance of marketing activities. Tourism VICs collate information on visitor figures or occupancies from their members and submit to both Overstrand Municipality and WESGRO.

Identification of research opportunities, for example assessing events hosted to determine economic impact.

### **15.5 KEY STRATEGY AREA 5: Position Overstrand as Events and Conference destination**

Utilise Events and Festivals as catalysts to generate publicity for the destination, drive economic spin-off and establish the Overstrand as a competent event destination. Overstrand Municipality to review events that support seasonality and transformation, optimise tourism volumes and yield. The economic impact of Events & Festivals should be measured by the income generated to the destination.

The Overstrand Municipality's Events Policy provides information to event organisers on the processes that should be followed in order to receive approval for the Event/Festival to be held in the Overstrand. This policy touches on aspects such as disaster management to ensure the wellbeing of visitors and locals. It has been identified that this policy need review. Overstrand Municipality to develop business tourism as the MICE sector (Meetings, Incentives, Conferences and Events). This can create a year-round distribution of visitors to our area. An objective is to attract more meetings, exhibitors, conferences and incentives to the area, encourage delegates to extend their visit and to do return visits. A database of existing infrastructure should be compiled to be able to cater after the requirements of business delegates.

### **15.6 KEY STRATEGY AREA 6: Development of new product offerings**

Identify new development opportunities or tourism routes for this area, develop and package these which can create economic opportunities in areas of population. There is an opportunity to create niche tourism markets (bird watching, golfers, mountain bikers, conference venues, etc.) and new tourism routes, for example an art or eco-route. The development of new attractions, products and events are key mechanisms in providing opportunities for disadvantaged communities. The following are suggested tourism attractions for development in the Overstrand:

- Route development – food/art/wine/book routes

- Romance Route – wedding venues, honeymoon options
- Hiking trails
- Bird watching trail
- New wedding/conference facilities
- Mountain biking trails
- Voluntourism (collaboration with WWF, marine businesses, conservation agencies and South African National Space Agency)

Education and training programmes that support inclusion of residents in the tourism industry need to be implemented with assistance of Department of Tourism. It is important for government to foster agreements/relationships and engage with the private sector to drive the development of newly identified tourism products (such as transport services, restaurants, accommodation providers). Because of the Overstrand's location next to the ocean, aquaculture is an important industry with huge potential to be developed as an additional tourist attraction for this region.

## 16. MARKETING ACTION PLAN

The projects listed below comprise strategic activities targeted to improve tourism in the Overstrand and are to be achieved over a year period, commencing 2016. This plan will be communicated to media, business chambers and tourism stakeholders.

Actions	Who	By When	Performance Targets
<b>Development of marketing strategy:</b> Workshop-sessions to be held with stakeholders/industry role players to get buy-in and feedback regarding development of marketing strategy, profiling and positioning of the Overstrand-region.	Facilitator & VIC's with Committees & industry stakeholders	2017 Done One for 2022 – 2025 to be developed before March 2022	One joint marketing and brand aligned strategy which incorporates all Overstrand towns.
<b>Brand reinforcement &amp; communication campaigns: ensuring all year-round presence:</b>  • Domestic marketing	O.M	Twice a year	- Implementation of a winter and summer campaign. - Improved packaging of experiences and products to appeal to targeted niche markets - Identify an event to coincide with campaign (for example: Thompsons Holiday

Actions	Who	By When	Performance Targets
<p>campaign for winter and summer season</p> <ul style="list-style-type: none"> <li>• Print advertisement</li> <li>• Below-the-line</li> <li>• CWC Newsletter</li> <li>• Influencer leveraging</li> </ul>		<p>On-going</p> <p>Quarterly</p>	<p>travel packages offered in conjunction with the Kalfieees).</p> <ul style="list-style-type: none"> <li>- Number of CWC media exposure</li> <li>- One quarterly trade newsletter to be published in support of marketing activities</li> <li>- leverage influencer social media posts</li> <li>- attendance of travel and trade shows</li> </ul>
<p><b>Maintenance of the Cape Whale Coast website, maintaining web-based information:</b></p> <ul style="list-style-type: none"> <li>• Content and re-design/further development of website is needed.</li> <li>• Develop other marketing requirements (this could entail social media platforms, Instagram, blogs)</li> </ul>	O.M	On-going	<ul style="list-style-type: none"> <li>- A consumer-driven website to ensure online communication. Towns' information to be integrated.</li> <li>- Number of monthly visitors to the site.</li> </ul> <p>CRM tool to be implemented: Launch social media campaigns to increase the traffic to social media pages and website. Database to be acquired from competition entries.</p>
<p><b>Profile the destination at international &amp; domestic marketing platforms:</b></p> <p>Have presence at key international and national exhibitions and road shows.</p> <p>Create opportunity for local product partners to participate at these platforms at a reduced rate.</p> <p>Guest relations programme to profile the destination to international and local media and trade. Exposure for the destination through:</p> <ul style="list-style-type: none"> <li>• Educational trips</li> <li>• Celebrities</li> <li>• Tourism</li> </ul>	O.M with assistance of VICs	Annually	<p>Participate at:</p> <ul style="list-style-type: none"> <li>• World Travel Market</li> <li>• Cape Argus Expo</li> <li>• Indaba –Durban</li> <li>• Cape Getaway Show</li> <li>• JHB Getaway Show</li> <li>• Beeld Holiday Show</li> </ul> <p>Distribution of collateral (with WESGRO) to the following exhibitions/workshops:</p> <ul style="list-style-type: none"> <li>○ ITB, Germany</li> <li>○ Sud -Afrika Tage Germany</li> <li>○ Arabian Travel Market</li> <li>○ World Travel Market</li> </ul> <p>Report on the number of contacts made.</p> <p>Liaise with SATourism / WESGRO to assist, arrange and host media trips. Host:</p> <ul style="list-style-type: none"> <li>• No. of Media visitors</li> <li>• No. of Trade visitors</li> </ul>

Actions	Who	By When	Performance Targets
stakeholders			
<p><b>Develop and print destination marketing material:</b></p> <ul style="list-style-type: none"> <li>Design and produce marketing collateral for the region.</li> <li>Develop branded display material</li> <li>Develop and compile an image library for Cape Whale Coast.</li> </ul>	O.M, with the assistance of VICs	On-going, throughout year.  2017 Done	<p>Report on the development of the following marketing material:</p> <ul style="list-style-type: none"> <li>Generic Destination map with Events Calendar-section</li> <li>Branded bags, key rings, etc.</li> <li>DVD's</li> <li>Translation of maps (German/Spanish)</li> </ul> <p>Develop branded display material:</p> <ul style="list-style-type: none"> <li>Portable branded exhibition stand/system</li> <li>Pop up banners</li> <li>Feather banners</li> </ul> <p>Establish image library for Cape Whale Coast</p>
<p><b>Development of tourism in Overstrand region</b></p> <ul style="list-style-type: none"> <li>Training/ information sessions offered to inform participants</li> <li>Mentorship / placement of trainees in tourism industry</li> <li>Small business support</li> <li>Development of themed routes</li> </ul>	O.M, with the assistance of the VICs	Ongoing	<p>Report on:</p> <ul style="list-style-type: none"> <li>Number of SMME supported</li> <li>Number of training sessions held for SMME's</li> <li>Number of courses offered, and educational visitors organized for Tourism staff.</li> </ul>
<p><b>Visitor Information Centres</b></p> <ul style="list-style-type: none"> <li>Providing information service to tourists and residents and implement marketing projects</li> </ul>	O.M with four VICs	Annually	Monthly reports to be submitted by the VIC's to Overstrand Municipality. Visitor stats to be collated and provided monthly to Wesgro.
<p><b>Events &amp; Festivals</b></p> <p>Sign MoA's with event organisers with relation to financial support.</p> <ul style="list-style-type: none"> <li>Compile an Annual Calendar of Events</li> <li>Compile a conference guide/ map</li> </ul>	O.M with event organisers	Annually  Ongoing	<ul style="list-style-type: none"> <li>Advertise annual in all local newspapers for a Call for Proposals: Events &amp; Festivals</li> <li>Report on the number of Events/Festivals supported.</li> <li>Receive festival reports a month after the Event/Festival has taken place.</li> </ul>
<b>Filming</b>	O.M. with Wesgro	2022	<ul style="list-style-type: none"> <li>Content promoted in Wesgro Film Location brochure an online</li> </ul>

Actions	Who	By When	Performance Targets
			material. • Facebook Page created and maintained

## 17.EVALUTION AND MONITORING

The following factors are fundamental in order for this marketing plan to succeed:

- Support and buy in of Council and top management are essential
- Sufficient budget allocation coupled with proper planning
- Adequate human resources to drive tourism development in the Cape Whale Coast.
- Full participation of all stakeholders in the tourism development process
- The marketing plan must be consistently implemented according to the SDBIP to achieve the desired outcomes

## 18.CONCLUSION

This marketing plan serves as a working document which should be consistently implemented over a four-year period, effective from 2018. Each suggested strategic objective can be revised and needs to be considered in detail pending budget allocations from Overstrand Municipality.

Collectively these strategic actions present a road map of how Overstrand Municipality can further grow tourism, create opportunities for SMMEs to be part of the industry and increase economic activity to our area. Stakeholder involvement and improved planning and budgeting for tourism development will be critical to the successful implementation of this plan. The protection and conservation of the natural and cultural heritage is fundamental to all future tourism development and marketing initiatives.

# Cape Overberg Visitor Trends

Annual 2017

**%**

share of overseas visitors **59%**  
share of domestic visitors **41%**  
share of overnight visitors **92%**  
share of day visitors **8%**

**Top 3**

**international markets**  
United Kingdom (25%)  
Germany (29%)  
USA (8%)

**Top 3**

**domestic markets**  
Gauteng (17%)  
Western Cape (58%)  
Eastern Cape (5%)

## Main purpose of visit

Holiday/Leisure **97%**  
Business **3%**

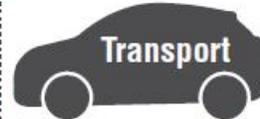


**Travel group size**  
Pairs 36%  
5&more 29%

**Age group**  
36-50 (27%)  
21-35 (44%)

## Length of stay

1 night **81%**  
2 nights **7%**  
3 nights **5%**



**Transport**  
Rented car **62%**  
Own vehicle **38%**

## Top information sources

Internet/Websites **53%**  
Word of mouth **34%**

**Average daily spend**  
R201 – R500 (31%)



**Average spend on accommodation**  
R501 – R1000 (42%)



**Top 3 activities in the Cape Overberg**



**Top accommodation**  
B&B's **22%**  
Self-catering **23%**



Gourmet Restaurants (42%) Culture (46%) Mice (8%)

# Cape Overberg Visitor Trends 2019

**WESGRO**  
cape town & western cape  
tourism, trade & investment

**%**

share of overseas visitors	58.9%
share of domestic visitors	41.1%
share of overnight visitors	80.6%
share of day visitors	19.4%

**Top 3**

## international markets

United Kingdom	(33%)
Germany	(30.7%)
France	(5%)

**Top 3**

## domestic markets

Western Cape	(73.1%)
Gauteng	(10.5%)
KZN	(6.4%)

## Main purpose of visit

Holiday/Leisure	82.7%
Business	4.4%
VFR	6.8%



**Travel group size**

Pairs	60.3%
Alone	17.3%

**Age group**

36-50	(30.2%)
51-70	(22.5%)

## Length of stay

1 night	46.1%
2 nights	17.1%
3 nights	7.2%



**Transport**

Rented car	48.1%
Own vehicle	41.4%

## Top information sources

Return Visit	14.9%
Word of mouth	50.2%

**Average daily spend**  
R501 – R1000 (35.6%)



## Top 3 activities in the Cape Overberg

Scenic Drives	(44.4%)
Outdoor Activities	(36.7%)
Cuisine	(38.2%)

Wesgro
 @wesgro
 Wesgro

It is currently only the Cape Whale Coast Tourism's Visitor Information Centres that provide statistics to Wesgro for the compilation of the Overberg Visitor Trends.