

Chapter 4 | Supply Analysis | Overberg District

Include MERO infographic here

Introduction

Lying between the Cape Peninsula and the Garden Route, the Overberg District is a place that boasts great diversity. Made up of four local municipalities (Theewaterskloof, Overstrand, Cape Agulhas and Swellendam) it is home to Hermanus a coastal town known as the jewel of the Cape Whale Coast for its abundance of marine wildlife. One can also stand at the southernmost tip of Africa (and the geographic meeting point of two oceans) when visiting Cape Agulhas. The beautiful Elgin Valley, an hour's drive from Cape Town is an under-appreciated wine region and Swellendam, a jaw-dropping beautiful natural wonderland, combining to create an area unlike any other.

With a landscape dominated by gentle, undulating hills, enclosed by the ocean and foreboding mountain ranges, the Overberg District is a favourite getaway for those seeking outdoor pursuits and adventure. It also acts as a stopover on route to the Garden Route, with many international visitors stopping off at Cape Agulhas.

Destination Positioning

According to research conducted by Wesgro in 2017, the most significant percentage of travellers to the area were holidaymakers (88.1%). Most visitors were from the Western Cape (71.6%), followed by Gauteng (14.1%). The top international source markets for the Overberg District currently are the United Kingdom (26.6%), Germany (22.9%) and the Netherlands (7.9%). The top three activities undertaken were scenic drives, culture and heritage and gourmet restaurants. Two thirds of visitors (66%) were over the age of 36 year, and were interested in gastronomical experiences. They spent more than one night in the region.

From a local tourism perspective, each tourism office has positioned the area slightly differently.

Cape Agulhas boasts about being the Southernmost tip of Africa and showcases its natural beauty, food and wine festivals and outdoor activities such as mountain biking and hiking.

The Cape Whale Coast bureau promotes its local food experiences, the ocean, the marine big five and whale watching activities and events such as the world-class mountain biking events such as the Cape Epic and Wine to Whales.

Theewaterskloof tourism offering appeals to a domestic weekend market who enjoy the Caledon Hot Springs, Caledon Casino, Theewaterskloof Dam, sporting events and the local wine routes.

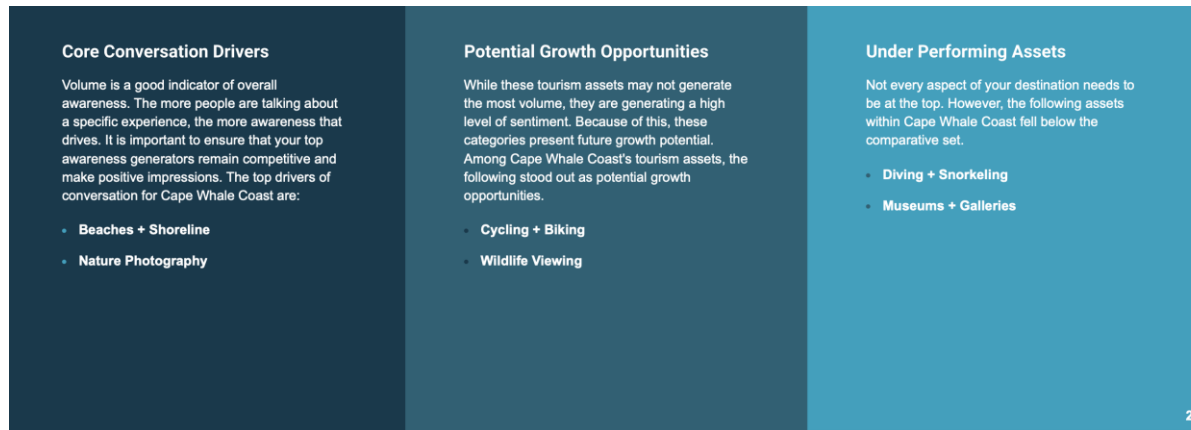
A review of 300 000 online conversations about the region and more specifically, the Cape Whale Coast showed that people enjoyed the areas beaches and shorelines, nature photography and wildlife viewing.

All Tourism Asset Data

Tourism Asset	Sentiment		Volume	
	Cape Whale Coast	Comparative Median	Cape Whale Coast	Comparative Median
Destination Services				
Access + Transportation	-6	7	31	23
Tours	19	19	622	383
Frontline staff	38	38	907	437
Weddings	64	66	841	588
Accommodation	67	62	3 806	1 631
Conventions	22	20	176	147
Culture + History				
Street + Public Art	42	50	343	249
Architecture	41	43	606	528
Museums + Galleries	12	27	998	657
Food + Culinary				
Wineries + Wine Tastings	45	50	3 795	2 145
Food Producers + Farmers Markets	54	55	95	88
Breweries + Pubs	59	54	786	543
Distilleries + Spirits	75	55	44	31
Restaurants	57	56	9 991	8 017
Relaxation + Wellness				
Shopping	36	36	80	55
Beaches + Shoreline	52	47	18 847	5 263
Amenities + Entertainment				
Attractions + Landmarks	38	44	981	627
Music + Performance Art	31	37	550	418
Festivals + Events	23	21	5 109	4 911
Nightlife	43	50	522	355
Outdoor Activities				
Sailing + Yachts	75	63	8	5
Surfing	70	65	149	41
Windsports	45	46	122	11
Equestrian Activities	28	40	129	116

Tourism Asset	Sentiment		Volume	
	Cape Whale Coast	Comparative Median	Cape Whale Coast	Comparative Median
Outdoor Activities Continued				
Diving + Snorkeling	39	42	209	51
Skateboarding	67	71	27	5
Sky Diving / Bungee / Ziplining	29	32	86	76
Fishing	44	46	866	239
Paddle Sports	34	36	602	175
Golfing	21	19	805	878
Hiking + Rock Climbing	52	48	2 783	1 522
Wildlife Viewing	52	46	4 303	1 395
Camping	37	32	473	145
Cycling + Biking	38	35	2 694	1 593
Nature Photography	59	57	14 531	6 250
TOTAL	50	46	76 889	60 403

Source: TSI, 2019



Source: TSI, 2019

Attractions and Experiences

Map here as per West Coast District.

A breakdown of tourism services and assets from the regional profiles indicate that Shark Cage Diving and Stony Point Penguin colony are currently draw the largest number of visitors to their attractions in the region.

Tourism Attractions Audit

Clean	Type of Attraction	Annual Visitors	Adult Admission Fee	Child Admission Fee	% Adult	% Child	% domestic	% international	Opening times	Closed days	Dwell time (hrs)	Full time	Part time
Old Harbour Museum, Hermanus	Heritage	31 776	R 20,00	R 5,00	70%	30%	10%	90%	9-4:30	0	30 min	18	2
De Hoop Stal, De Hoop	Nature	42 216	R 50,00	R 30,00	80%	20%	40%	60%	7- 6:00	0	2 days	70	10
Cape Nature De Hoop	Nature	25 372	R 50,00	R 30,00	94%	6%	99%	1%	7- 6:00	0	5	n/a	n/a
StonyPoint Penguin Colony	Animal Viewing	78 967	R 25,00	R 15,00	89%	11%	99%	1%	8-4:30	0	1	n/a	n/a
Shark Diving Gansbaai (consolidated)	Animal Viewing	80 000	R 2 200,00	R 2 200,00	96%	4%	10%	90%	7- 1:00	0	4	n/a	n/a
Cape Agulhas	Nature	39 396	R 43,00	R 22,00	n/a	n/a	61%	39%	7- 7:00	0	1	n/a	n/a
Drostdy Musuem, Swllendam	Heritage	4 500	R 30,00	R 10,00	80%	20%	60%	40%	9-16:45	0	30	24	7
Bontebok National Park	Nature	21 929	R 43,00	R 22,00	n/a	n/a	67%	33%	7-6:00	0	4	n/a	n/a
Kogelberg Nature Reserve	Nature	8 262	R 50,00	R 30,00	90%	10%	99%	1%		0	n/a	n/a	n/a
Harold Porter Garden	Nature	61 253	R 30,00	R 12,00	n/a	n/a	n/a	n/a	8 -4:30	0	n/a	30	2
Panthera Africa, Big Cat Sanctuary	Animal Viewing	4 538	R 290,00	R 190,00	83%	17%	72%	28%	pre-bookings only	1	2	7	2

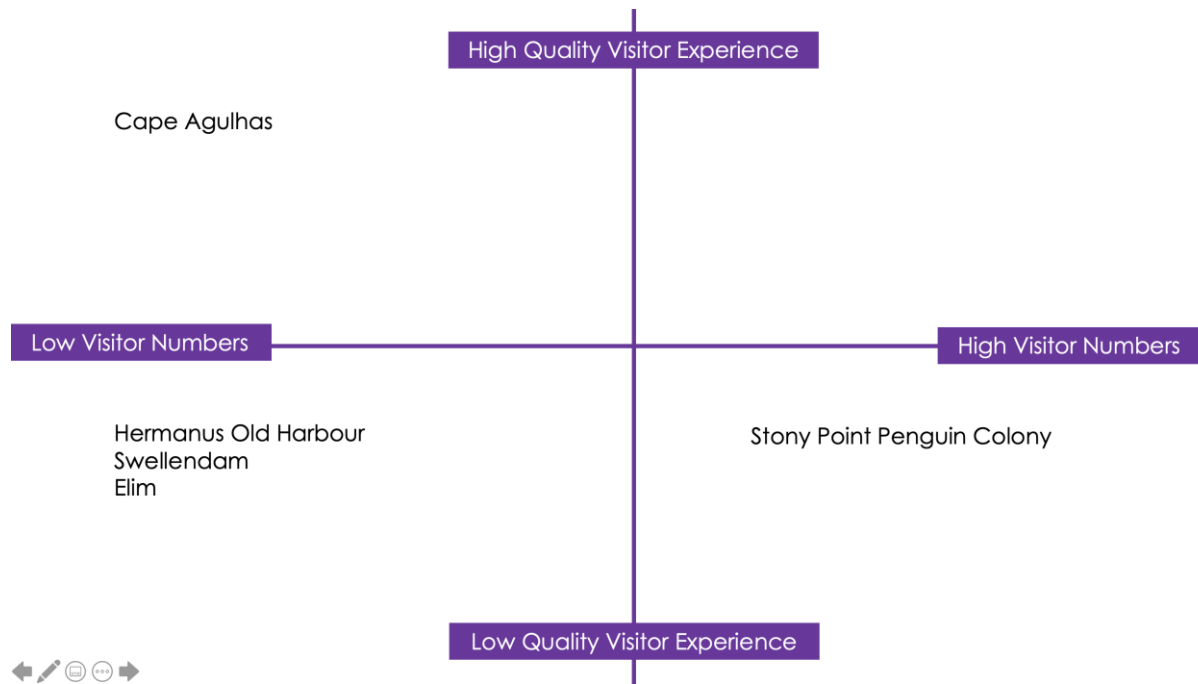
Audit Outcome

- The top ten attractions in the Overberg District draw almost 400 000 visitors annually.

- The three most visited experiences/attractions are Shark Cage Diving (as an aggregate of all operators); Stony Point Penguin Colony and the Harold Porter Botanical Gardens. Each is receiving over 60 000 visitors annually.
- Visitors are relatively well distributed across attractions in the region with the majority receiving 20 000 plus visitors annually.
- Swellendam, a notable historic town on the N2 highway, experiences a high volume of passing traffic. Currently, it does not have a significant attraction acting as a drawcard. At present, the historic town receives 4 500 visitors to its historical museums.
- Attractions in the region draw primarily adult visitors, with the Old Harbour Museum in Hermanus being the only attraction to bring a significant number of children (70% adults, 30% children) compared to the other attractions audited.
- The domestic market accounts for over 60% of visitors to the majority of the attractions. However, shark cage diving in Gansbaai and the Old Harbour Museum in Hermanus are dependent on international visitors.
- All attractions are open seven days per week.

- All the attractions offer an excellent range of dwell time. Visitors can enjoy up to half a day shark cage diving, and spend a shorter period at other attractions. These different dwell times ensures that visitors can add more than one attraction/experience to their visit, thereby creating a full itinerary.
- There are no dedicated attractions and play areas designed for travellers with children.
- The majority of attractions are nature-based.
- Heritage based attractions can be better leveraged, e.g. Hermanus Old Harbour, Elim.
- The region has an authentic historical observation experience, the Agulhas Lighthouse.
- The majority of attractions have entry fees of R50 or under during the research period (September 2019), making it well priced for the domestic market.

Audit Segmentation



High Quality Low Visitor Numbers

De Hoop offers a high quality experience but has low visitor numbers due to capacity constraints of the Whale Trail.

Cape Agulhas offers a good experience with high international appeal, but visitor numbers are low compared to what other sites in the region receive. The experience should aim to draw as many visitors as Stony Point and Gansbaai Shark Cage Diving.

Drostdy Museum Swellendam, is a good quality historical cultural experience with low visitor numbers.

Bontebok National Park and Kogelberg Nature Reserve receive primarily domestic tourists.

Panthera Africa has low visitor numbers which may be a function of awareness of the attraction.

High Quality Experience, High Visitor Numbers

De Hoop Stal offers a high quality experience with a range of activities and experiences.

Shark Cage Diving, Gansbaai attracts a healthy number of visitors, particularly considering that this is a seasonal activity.

Harold Porter Botanical Gardens

Low Quality Experience, Low Visitor Numbers

Hermanus Old Harbour, and surrounding museums are of interest to travellers as is evidenced by the number of walk in guests. But the museum needs to be upgraded to provide an engaging visitor experience able to occupy visitors for 30 – 40 min.

Elim, whilst Elim is an authentic and charming heritage village, the village currently has no infrastructure for tourism. It is an ideal stop on the Cape Whale Coast route to Agulhas but needs to create a compelling reason to visit.

Low Quality of Experience, High Visitor Numbers

StonyPoint Penguin Colony home of the African penguin can become a significant drawcard to the region. The site has the potential to significantly increase visitor numbers and will need the infrastructure to support this.

Opportunities and Gaps | Finding the sweet spot

To attract visitors all year round and ensure geographic spread across the coastal and inland areas, investment and promotion of the district need to centre around its hyperlocal and distinguishing offerings.

Considering the age profile currently attracted to the Overberg District (36 years and over) attractions that wish to act as drawcards and grow this market need to:

- Appeal to this market
- Include cuisine and wine tasting experiences

- Generate an itinerary that includes half-day visits and a combination of high-quality short stay (under two hours) attractions that draws visitors to the region

Did you know?

The best time of year to experience fynbos at its best is late winter and spring, but at any time of year this part of the world is beautiful.

Sweet Spot 1: Hiking

According to the Adventure Travel Association 2019 research, hiking, trekking or walking is the most popular adventure activity enjoyed by travellers particularly those aged 41 – 60 years. Europe and North America are key source markets for this trend and have shown an increased interest in trekking in Southern Africa with a demand for customised itineraries in remote destinations or trails.

<https://www.adventuretravel.biz/research/2019-industry-snapshot>

The gap:

Hiking and trekking is primarily aimed at local domestic travellers. Booking famous hikes in the region requires local knowledge as to when and how to book. Hikers need to have their own transport and gear and provide their own sustenance and transport. The remote region of Torres del Paine in Chilean Patagonia draws 250 000 hikers per year completing a range of activities from 1 day hikes to 9 day treks. Simple mountain refuges house the hikers and there is substantial tourism economy that supports the hiking industry from transport to start and finish destinations, guides, day pack lunch providers and the hiring of gear.

The opportunity:

The fynbos riches of the Overberg are world-renowned, and botanists and visitors have admired and studied them since the seventeenth century. (<http://www.overberg.co.za/content/view/80/28/>).

Experiences such as The Fynbos Trail (<http://www.fynbostrail.co.za/index.php>) and Whale Coast Trail provide walking tours along stretches of coastal and mountain fynbos in the heart of the Cape Floral Kingdom, allowing hikers to experience a truly unique hiking holiday (from a day trip to one or two-night hike).

UNESCO World Heritage Site protects the Cape Floral Kingdom, which is made up of eight areas. Three of these are in the Overberg District. Namely Kogelberg Nature Reserve, De Hoop Nature Reserve and Boosmansbos Wilderness Area.

This natural offering provides a unique opportunity to centre tourism products around the hyperlocal, unique and UNESCO recognised fynbos biosphere.

Sweet Spot 2: Marine sea life Viewing

Current tourism activities: Whale watching, shark cage diving, penguin viewing

Tourist attractions: The region has several well-placed viewing points for visitors to see a collection of rare marine animals. Hermanus is known as one of the best places in the world to see whales from land.

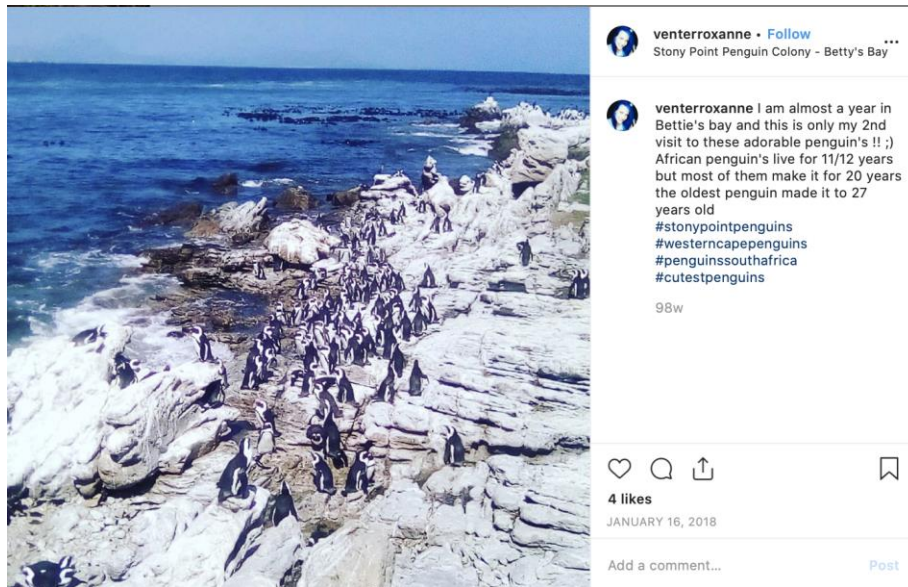
The gap

Seasonality: Whale watching and shark cage diving are seasonal. Expanding the experience to view more marine animals will provide a year-round drawcard to the region.

The opportunity

Rare and endangered marine life such as abalone, penguins, whales and great white sharks can become significant drawcard experiences.

Viewing penguins is often on the top ten things to do in South Africa. Today, Boulders receives almost 600 000 visitors per annum. The rare and endangered African Penguin already draws a substantial number of visitors (80 000 per annum) to Stony Point Nature Reserve in Betty's Bay. 99% of these visitors are domestic. There is an opportunity to use this drawcard to pull international travellers along the Overberg Coast Route. Stony Point can offer visitors a less crowded experience, but one just as delightful as they travel along the coastal Route.



The upgrading of The Whale Museum in Hermanus is needed to provide a year-round museum experience on the subject matter.

The shark cage diving experience draws 80 000 visitors annually. This experience is not accessible unless participating in a based boat activity. At present, this experience is dominated by international visitors (90%) compared to the 10%

domestic market. There is an opportunity to build a Great White Shark visitor experience that can be accessed all year round on land and provides an access point for the domestic market to engage with the subject matter.

The design of experiences must be in such a manner that they appeal to families with children.

Sweet Spot 3: Hyperlocal gastronomy

16.7% of visitors to the Overberg District list gastronomical experiences as a top activity in the region.

Current tourism activities: wine tasting, olive tasting, beer tasting and gin distilleries

Tourist attractions: There are many good restaurants and food tasting experiences in the region, yet only one, the Elgin Railway Market, acts as a significant drawcard. This experience is only open on weekends

The Whale Coast Route, which begins in Cape Town and follows the breathtaking R44, also known as Clarence Drive, has the chance to become the scenic gateway to the Koggelberg region.

The Route takes in the Kogelberg Reserve, passes through Rooiels, Pringle Bay, Betty's Bay, Kleinmond, Hermanus, Stanford and ends in Gansbaai. One can include Baardskeerderbos, Elim and Cape Agulhas.

The gap:

Gastronomical experiences which are unique to the region and memorable in their setting and food quality.

The opportunity:

The opportunity exists for visitors to take in the highlights and hyperlocal food and beverage experiences, and for businesses along the way to offer these. This experience can tie in with the marine offering, fauna and heritage of the area.

For example:

- There is an opportunity to create and link Fynbos infused gastronomical experiences.



Source: www.nationalgeographiclodges.com

Grootbos Private Nature Reserve offer a unique 4x4 Fynbos Safari Experience

- Develop an Abalone Farm Tour, ie visit a working abalone farm and have tasting afterwards.
- A one hour Abalone farm tour and food experience. The Abalone farm tour will act as a drawcard for the Asian market. This tour could add a new attraction to the area while supporting jobs and growing the local economy. It also offers the opportunity to educate visitors on the impact of illegal poaching.

- Seafood harbour experiences. Several harbour experiences exist, and these can become a must-do gastronomic experience suitable for mid-price travellers and families. The harbours of Onrus, Hermanus, Gansbaai and Arniston all provide scenic opportunities to taste hyperlocal seafood cuisine.

Sweet Spot 4: Culture and heritage experiences

Current tourism activities: Elim, Hermanus Old Harbour

Tourism attractions: There are several unique and authentic heritage experiences in the area.

The gap:

High quality cultural and heritage experiences can act as a stopping off point or link areas, pulling visitors further into the region, e.g. linking Gansbaai and Cape Agulhas.

The opportunity:

The Overberg District has several authentic, well-placed heritage attractions. Several of these are of poor quality. There is an opportunity to provide a modern museum experience that tells a compelling story in a simple yet powerful manner. Dwell time should be 30 min to 1 hour. DELERE: to act as a pull factor to the 35-year-old plus visitor.

The entire village of Elim has been declared a National Heritage Site, with most of the buildings dating back to the 19th century. Today though you now see brightly painted buildings with corrugated steel roofs, inter-dispersed between traditional thatched cottages. The Moravian community consists of farmers, farmworkers and artisans. The Elim thatcher's are particularly renowned for their craftsmanship, and the area is becoming well-known for the cultivation of vineyards and the export of fynbos (Elim's fynbos is the rarest in the world!).

There is an opportunity to use this unique historical village as a focal point for the Gansbaai - Aghulas route for self-drives. The village at present is not market-ready however and would need a compelling reason for visitors to stop and take a walk through the village. An opportunity would be to bring in an independent (not chain) superior cafe/coffee shop and short walking or cycling tours. These could focus on creating a one hour dwell time experience.



Source: Flickr (Moravian Church)

There is also an opportunity to create a world-class, year-round offering at the Old Harbour site in Hermanus. This site offers the charm of the harbour and can be used to showcase local gastronomical offerings and provide family-friendly activities.

The Old Harbour Open-Air Museum, which includes the Old Harbour itself is a provincial heritage site. Built-in the 1800s the Old Harbour provided a haven for small fishing boats and residents would gather daily to watch the boats come in

and the daily catch been cleaned and sold. It was once also a popular shark catching spot. The Old Harbour was declared a national monument in 1970.

The museum needs significantly upgrading to provide a world-class museum on whaling and the whales of Hermanus. The Old Harbour could be animated with activities such as a farmer's market or local food or a harbour seafood experience.



Source: Pinterest

The Cape Agulhas Lighthouse currently provides an observational experience that attracts over 30 000 visitors per annum. Enhancement of this experience could draw additional visitors by creating a highly desirable Instagram opportunity. (40 000 admissions are not going as far as Cape Agulhas)



Source: www.xplorio.com

The historical town of Swellendam has the opportunity to become more than just a coffee stop on the N2 highway. A visitor attraction suitable for the domestic market that offers kid-friendly food and activities could provide a 60 - 90min

dwell time. The play area needs to be so unique and fun that it becomes a must-stop on the way to the Garden Route.

It will have the ability to build a repeater market.

Tourism Nuclei

(the explanation will be done upfront and not per region).

Primary:

- The southernmost point in Africa, Cape Agulhas
- Shark Cage Diving

Primary: Seasonal

· Whale Watching

Secondary

- Penguin watching at Stony Point Nature Reserve
- Hermanus Old Harbour

Tertiary

- Elim
- Swellendam
- Wine Farm tourism

Conclusion:

The Overberg District can package and market its uniqueness through the lens of hyperlocal gastronomy experiences. Eating fish and chips at one of the local harbours can become bucket list activity. Abalone tasting can attract the highly desirable Asian market, and Fynbos based gastronomical experiences can become endemic to the region.

The region also provides a unique opportunity to view rare and endangered marine life not easily accessible elsewhere in the world. Abalone, Jackass Penguins, whales and great whites are all significant marine viewing drawcards that can appeal to international and domestic visitors. These experiences can be accessible all year round.



Source: [www. Afristay.com](http://www.Afristay.com)

The heritage sites of the region do not offer a highly desirable visitor experience at present. With carefully curated upgrades, they can act as further drawcards.