Munisipaliteit • U-Masipala • Municipality
OVERSTRAND

ORDINARY MEETING OF THE MAYORAL COMMITTEE

GEWONE VERGADERING VAN DIE BURGEMEESTERSKOMITEE

INTLANGANISO YESIQHELO YEKOMITI KASODOLOPHU

A G E N D A
I-AJENDA

DATE / DATUM / UMHLA :	**25 AUGUST / AUGUSTUS / AGASTI 2026**
	BANQUETING HALL, CIVIC CENTRE HERMANUS
TIME / TYD / IXESHA :	**09:00**

MUNICIPALITY / MUNISIPALITEIT / UMASIPALA WE-OVERSTRAND

Office of the Municipal
Manager
Municipal Offices
HERMANUS

18 August 2026

NOTICE TO ALL ALDERMEN AND COUNCILLORS

NOTICE IS HEREBY GIVEN that an **ORDINARY MEETING** of the **MAYORAL COMMITTEE** will be held in the **BANQUETING HALL, CIVIC CENTRE, HERMANUS** on **TUESDAY, 25 AUGUST 2026** at **09:00** to consider the items set out in the attached agenda.

MR E JANTJIES
ACTING MUNICIPAL MANAGER

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18 Augustus 2026

KENNISGEWING AAN ALLE RAADSHERE EN RAADSLEDE

KENNIS WORD HIERMEE GEGEE dat 'n **GEWONE VERGADERING** van die **BURGEMEESTERSKOMITEE** gehou sal word in die **BANKETSAAL, BURGERSENTRUM, HERMANUS** op **DINSDAG, 25 AUGUSTUS 2026** om **09:00** vir oorweging van die items op die meegaande agenda.

MR E JANTJIES
WAARNEMENDE MUNISIPALE BESTUURDER

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18 Agasti 2026

ISAZISO ESIYA KUBO BONKE OOCEBAKHULU NOOCEBA

INTLANGANISO YESIQHELO YEKOMITI KASODOLOPHU WE-OVERSTRAND

OKU KUKWAZISA ukuba intlanganiso **YESIQHELO yeKOMITI KASODOLOPHU**, **iza kuba se I-BANQUETING HALL, kwiZiko, eHERMANUS** u**LWESIBINI UMHLA, 25 AGASTI 2026** ngeye-**09:00 ukuqwalasela imicimbi ekule ajenda iqhotyoshelwe apha.**

MR E JANTJIES
UMPHATHI KAMASIPALA OBAMBELEYO

AGENDA/...

OVERSTRAND MUNICIPALITY

MAYORAL COMMITTEE MEETING

25 August 2026

I N D E X

No items were received for this Portfolio

1. OPENING

2. APPLICATIONS FOR LEAVE OF ABSENCE

3. CONFIRMATION OF MINUTES

3.1 Minutes of an **Ordinary Meeting** of the **Mayoral Committee** held on **Tuesday, 23 June 2026** at **09:00**

4. STATEMENTS AND COMMUNICATIONS BROUGHT FORWARD BY THE EXECUTIVE MAYOR / DEPUTY EXECUTIVE MAYOR

5.
REPORT: OUTCOME OF OVERSTRAND TOURISM RESEARCH

R Louw Divisional Manager: Strategic Support Services
22 July 2026 (028) 313 8071

1. **Executive Summary**

   The purpose of this report is to provide the executive summary and recommendations of the Overstrand Tourism Research conducted by Professor Jayne Rogerson.

2. **Service Delivery and Budget Implementation Plan - IGNITE**

   Office of the Municipal Manager
   Tourism

3. **Compliance with Strategic Priorities**

   Provision of democratic, accountable and ethical governance
   Promotion of tourism, economic and social development

4. **Delegated Authority**

   None

5. **Legal Requirements**

   NA

6. **Background/Discussion/Evaluation/Conclusion**

   Background

   Professor Jayne Rogerson was commissioned by the Municipality to conduct a comprehensive, evidence-based study of the Overstrand tourism economy.

   The initial aim of the study was to analyse the challenges and expectations of local tourism businesses and the potential role of the municipality. The responses from Overstrand tourism businesses who were interviewed face to face highlighted a range of tourism and broader structural issues.

   The next phase of the study was a two stepped approach. The first aim was to understand how tourism offices were organised and funded in other Western Cape municipalities. The second aim was to broaden the tourism feedback from the Overstrand by surveying tourism and non-tourism businesses as well as Overstrand residents.

The findings from this investigation provide a pathway for a forward-looking tourism policy for the Overstrand. The foundation for any tourism policy is **evidenced-based research**, which is what has been collected in this study.

In undertaking the study, six objectives and research tasks were defined.

- First, to look outside South Africa at the international experience of local governments and tourism. How, for example, are local governments in Australia, Britain, Ireland, Canada, New Zealand dealing with tourism?
- Second, turn to South Africa to examine the changing policy environment, in particular at national government level, which essentially ‘frames’ what is undertaken at level of local municipal level.
- Third, to narrow down to unpack the state of the Overstrand tourism economy. The questions are what its key drivers are and how has the municipality performed if benchmarked against other South African municipalities.
- Fourth, the research drilled down to analyse the perspectives of local tourism stakeholders, and in particular of local tourism businesses.
- Fifth, interviews with Provincial Department of Economic Development and Tourism (DEDAT) and other Western Cape municipal tourism offices were undertaken in order to provide a benchmark for Overstrand tourism going forward.
- Finally, three online surveys across the Overstrand were carried out in order to obtain feedback on a variety of tourism related issues. The surveys canvassed the responses from tourism businesses, non-tourism businesses and residents.

Discussion

The executive summary and recommendations of the Overstrand Tourism research are attached as **Annexure A**.

7. Financial Implications

Funded from the Operating budget of the Tourism Section.

8. Staff Implications

None

9. Comments from other Departments, Divisions and Administrations

None

10. Annexures

Annexure A: Executive Summary and Recommendations of the Overstrand Tourism Report

RECOMMENDATION TO THE COUNCIL:

1. that the Executive Summary and Recommendations of the Overstrand Tourism Report **be noted**;

2. that Council decides on the implementation of specifically recommendations 3, 5 and 6:

   2.1 Recommendation 3: Destination branding:

   Revert back to the **Cape Whale Coast tourism branding**, as the ‘’Overstrand’’ brand carries no emotional or geographical resonance for prospective visitors;

   2.2 Recommendation 5: Establish an Independent, Professionally Governed Destination Management Organisation (DMO):

   Investigate the establishment and costing of a DMO for the Municipality;

   2.3 Recommendation 6: Appoint a dedicated tourism bridge person. This implies filling the vacancy of the Tourism Manager.

3. that the administration compiles an action plan for implementation of the recommendations.

RESPONSIBLE OFFICIAL : **R LOUW**

TARGET DATE FOR IMPLEMENTATION : **31 AUGUST 2026**

Annexure A
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OVERSTRAND TOURISM REPORT

JUNE 2026

JAYNE ROGERSON

EXECUTIVE SUMMARY

This report presents the findings of a comprehensive, evidence-based study of the Overstrand tourism economy, commissioned by the Overstrand Local Municipality. It is the first detailed investigation of its kind since the PricewaterhouseCoopers baseline study of 2010, and it arrives at a critical juncture, a period in which the local tourism economy has substantially recovered from the disruptions of COVID-19 and now stands at a point where deliberate, forward-looking policy choices will determine whether the Overstrand secures its position as one of South Africa's most distinctive coastal destinations, or cedes ground to better-organised competitors. The study draws on multiple research methodologies: desktop analysis of international and South African policy frameworks; quantitative tourism economic data at municipal scale; 46 face-to-face semi-structured interviews with tourism businesses and local government officials; comparative interviews with Western Cape tourism offices; and three large-scale online surveys canvassing 183 tourism businesses, 73 non-tourism businesses, and 1 450 residents of the Overstrand.

Introduction and Methodology

Local governments "occupy a complex, central role at the heart of the tourism industry" (Shone, 2013). The Overstrand Municipality is, in this sense, at the proverbial coalface of one of South Africa's most tourism-dependent local economies. Recognising that the last fifteen years had passed without dedicated research to guide policy, the municipality commissioned this study to analyse the challenges and expectations of local tourism businesses, to understand how comparable Western Cape municipalities organise their tourism functions, and to obtain broad community feedback through systematic surveys. Six research objectives frame the investigation: an international scan of local government tourism practice; a review of the evolving South African policy environment; a data-driven analysis of the Overstrand tourism economy benchmarked against comparable municipalities; an in-depth stakeholder interview programme with local tourism businesses; comparative interviews with four Western Cape tourism offices and the Western Cape Department of Economic Development and Tourism; and three online surveys spanning tourism businesses, non-tourism businesses, and residents. Each objective employed the research method most appropriate to it (desk research, proprietary economic databases, purposive qualitative interviewing, and structured quantitative survey instruments) producing a triangulated evidence base designed to support sound and defensible policy decisions.

Local Governments and Tourism: The International Experience

A review of the international record reveals that local governments across Australia, New Zealand, Ireland, Canada, and the United Kingdom have long played a decisive role in shaping the competitiveness and sustainability of tourism destinations. The key insight from this body of experience is that the dominant "industrial policy" approach to tourism, which prioritises short-term stimulus, destination marketing, and visitor numbers, is increasingly regarded as insufficient. In its place, leading jurisdictions are adopting an integrated, long-term approach that recognises tourism policy as inseparable from land use planning, environmental management, infrastructure provision, community development, and economic diversification. Local governments that have performed best are those that moved beyond siloed, sector-by-sector policy-making to embrace what the OECD terms a "whole of government" approach: one in which inter-sectoral complementarities are actively planned for, the public interest is protected, and tourism is understood not merely as an industry to be stimulated but as a social and environmental system to be managed. The international experience also underscores the risks of over-reliance on a single attraction, the corrosive effect of inadequate community engagement, and the reputational damage that flows from inconsistent or corrupt planning processes. These lessons carry direct relevance for the Overstrand.

Local Governments and Tourism in South Africa

South African policy since 1994 has progressively clarified the role of local government in tourism through a series of landmark documents: the 1996 Constitution and White Paper on Tourism, the 1998 White Paper on Local Government, the 2010 Tourism Planning Toolkit, successive National Tourism Sector Strategies, the 2023 Tourism Sector Master Plan, and the 2024 White Paper on Tourism. Running through this entire policy lineage is a consistent, if not always operationalised, principle: that tourism is a concurrent function of all three spheres of government; that local municipalities bear primary responsibility for the on-the-ground environment in which tourism takes place; and that the exact role of any given municipality must be calibrated to local conditions, skills, and financial resources. Critically, the accumulated policy evidence confirms that "the decisions and actions of the entire municipal organisation determine whether tourism thrives or flounders in a local area" (van der Watt, 2013). Tourism in South Africa is not the sole responsibility of a single tourism line department; it is shaped by every decision the municipality makes, from land use and infrastructure to public safety and economic development. The 2024 White Paper reiterates this emphatically, calling for the harmonisation of the tourism mandate across all spheres of government and the explicit inclusion of tourism priorities in Integrated Development Plans.

Understanding the Overstrand Tourism Economy

Drawing on S&P Global's Tourism Model (the only source of tourism economic data available at municipal scale in South Africa) this section establishes the structural significance and recent performance trajectory of the Overstrand tourism economy. The data confirm that tourism contributes approximately 20.8% of local GDP, placing the Overstrand eighth among the most tourism-dependent local municipalities in the country. Leisure tourism dominates the visitor mix, accounting for nearly two-thirds of all trips, and the international market is of disproportionate importance: while domestic tourists outnumber international visitors in trip terms, international visitors generate the majority of commercial bednights, staying significantly longer and spending considerably more per visit. Total tourism spend reached its highest recorded level of R2.85 billion in 2024, and leisure trip volumes have similarly hit a new peak. However, the recovery has not been uniform. Comparative benchmarking reveals that the Overstrand's relative ranking in national tourism spend has held steady at 25th - suggesting that while absolute performance has recovered, competitors such as Saldanha Bay, Mossel Bay, and Kouga have bounced back from COVID-19 more strongly. This pattern of relative underperformance, set against a backdrop of exceptional natural assets and a world-class infrastructure platform, is a central finding that subsequent sections of material seek to explain.

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Tourism Business Responses

The 46 face-to-face interviews conducted with tourism businesses across the Overstrand, spanning accommodation, restaurants, wine farms, attractions, event organisers, and real estate agents, present a nuanced picture of a sector in confident but cautious recovery, set against persistent structural frustrations. Sentiment towards the municipality is mixed: core service delivery (infrastructure maintenance, street cleanliness, visible security) attracts consistent and genuine praise, with several businesses noting that the Overstrand compares favourably against the national context.

However, this goodwill is eroded by significant pain points in three areas. First, the planning and building department is widely experienced as a barrier rather than an enabler of investment, with excessive regulatory friction, slow approvals, and a perceived culture of "no" deterring both development and business confidence. Second, tourism signage is described as chaotic, inconsistently branded, bureaucratically inaccessible, and in many areas simply absent, while the municipality's UNESCO Creative City of Gastronomy accreditation remains unknown even to businesses who would most benefit from it. Third, communication between the municipality and the tourism sector has deteriorated significantly since the departure of a key outward-facing tourism official, leaving businesses without a clear point of contact and the municipality without an effective "bridge" into the private sector.

On business performance, the overwhelming majority of interviewees report that 2025 has returned to pre-COVID levels, with October whale season and the international leisure market driving recovery. Staffing emerges as the single most critical operational challenge, with businesses routinely sourcing management-level staff from Cape Town due to an absence of locally trained hospitality talent. Geographic inequality is a recurring theme: businesses in Stanford, Gansbaai, and Kleinmond consistently report feeling marginalised relative to the Hermanus CBD, both in terms of municipal attention and tourism marketing.

Tourism Marketing, Tourism Offices, and the Role of the Municipality

Tourism marketing is identified by businesses as the single most critical area requiring improvement. The near-universal perception is that the Overstrand is being under-marketed as a destination: most businesses are unaware of any meaningful municipal destination promotion, the "Overstrand" brand itself is regarded as an administrative label with no emotional resonance for tourists, and the destination's narrative remains almost entirely captive to whale watching despite a rich and diverse offering of wine, gastronomy, hiking, adventure, beaches, art, and heritage. This over-reliance on a single seasonal attraction carries strategic risk, vividly illustrated by the intense contraction of Gansbaai's shark cage diving sector, which has lost 59% of its visitors over a decade, and it results in the persistent "one-night stopover" pattern that suppresses both bednight yield and the spread of economic benefit.

Overstrand's tourism offices are experienced as outdated in physical presentation and limited in their marketing function, though individual staff members are praised for their dedication. The weekly tourism diary is valued; the bricks-and-mortar model is not. Businesses call for a professional, dedicated destination manager, a digital-first marketing strategy, and a visible presence at national and international trade shows where tour operators design itineraries one to two years in advance.

As for the municipality's broader role, there is a clear and consistent message: the strong foundation of service delivery and infrastructure must be maintained, but the municipality must now evolve from service provider to active economic facilitator, breaking down regulatory barriers, enabling skills development, coordinating the tourism ecosystem, and providing the strategic direction that the private sector cannot generate in isolation.

Municipal Tourism Offices in the Western Cape: A Comparative Perspective

In order to situate the Overstrand's tourism governance within the Western Cape context, detailed interviews were conducted with the provincial Director of Tourism at the Department of Economic Development and Tourism, and with representatives of four comparative municipal tourism offices: Visit Stellenbosch, Mossel Bay Tourism, Plett Tourism, and the former Saldanha Bay Tourism Organisation. The provincial director identified the structural landscape as a "mishmash" resulting from the repeal of the Western Cape Tourism Act and the enforced separation of funding relationships under MFMA Circular 131, which now requires open tender processes for what were previously direct municipal grants to tourism bodies. Against this backdrop, the standout models of Visit Stellenbosch, Mossel Bay Tourism, Plett Tourism share a set of common characteristics: semi-independent governance structures with public-private boards; diversified funding combining municipal grants (R5 million in the case of Mossel Bay) with membership fees and commercial revenue; professional, specialist teams with clear mandates; strong digital presences and data-informed strategies; active participation at trade shows; and a disciplined shift from generic destination advertising to layered, niche destination storytelling. The cautionary tale is provided by Saldanha Bay, where governance failures caused the complete collapse of a once-functional tourism office, leaving businesses to operate on isolated islands with no collective voice, no coherent brand, and no connection to provincial marketing platforms. The key lesson for the Overstrand is that the structure of tourism governance matters enormously: well-designed public-private partnerships consistently outperform purely in-house models in agility, market effectiveness, and private sector trust.

The Overstrand Tourism Office: Internal Perspectives

Interviews with the Overstrand Tourism Office staff and with the Municipal Manager illuminate the institutional landscape from the inside. The tourism office is staffed by a single permanent employee (all other officers are on rolling temporary contracts) and has been operating without a Tourism Manager since that post was deliberately left vacant pending the finalisation of a long-term tourism strategy. A draft of that strategy has languished unsigned for over three years.

The tourism function was absorbed into the Planning and Development directorate following the dissolution of the LED department, a structural transition that has left tourism without a permanent institutional home, adrift between municipal pillars, and overwhelmed by administrative and procurement obligations that crowd out any proactive marketing or business engagement. The loss of the established "Cape Whale Coast" brand in favour of a corporate "Overstrand Tourism" identity has eroded market equity without building a coherent replacement. The Municipal Manager is candid about these constraints, attributing the absence of independent tourism structures partly to the operational disruption caused by MFMA Circular 131 and partly to the decision to hold the Tourism Manager vacancy until a strategy is in place. He articulates a clear vision of the municipality's appropriate role of creating a conducive environment rather than operating tourism directly, and identifies concrete next steps: understanding Overstrand's tourism economy, regional benchmarking and capitalising on public-private infrastructure co-funding mechanisms. What emerges from both sets of interviews is a tourism function that is institutionally under-resourced, strategically adrift, and urgently in need of both structural clarity and political will to move forward.

Survey Results: Tourism Businesses, Non-Tourism Businesses, and Residents

Three large-scale online surveys canvassed the views of 183 tourism businesses, 73 non-tourism businesses, and 1 450 residents, providing robust quantitative validation of the qualitative findings and extending the evidence base across the full Overstrand community. Among tourism businesses, confidence in the five-year outlook is high (65% are confident or very confident), but this optimism is tempered by clear frustration with marketing effectiveness. Nearly 40% rate current destination marketing as ineffective or very ineffective and by shared concerns about water supply constraints, load-shedding, tourism signage, and housing affordability as a labour-market constraint.

The strategic priority most strongly endorsed by tourism businesses is extending the tourist season beyond whale season, followed by promoting the Overstrand as a year-round food and wine destination. The non-tourism business survey confirms that even firms with no direct dependency on visitors are shaped by tourism cycles through the broader local economy, and that the sector's primary demands are improved public safety, dedicated economic development support, and affordable staff housing. This conveys a strong signal that the community expects a more balanced development agenda. The resident survey, drawing on the most established and geographically diverse sample, delivers perhaps the clearest strategic mandate of all. Residents are not anti-tourism: 66% believe the benefits of tourism outweigh the negatives, 80% recognise its role in job creation, and the general atmosphere during the tourism season is rated positively by 73%. Indeed, over 90% of respondent's host visiting friends and relatives during the year with two thirds hosting visitors over the busy Christmas and Easter period. Residents are a tourism positive as they become accommodation providers, hosts and tour guides during the season, however, their visitors do contribute negatively to traffic congestion and stress on scarce resources. But residents are unambiguous about the conditions attached to their support: traffic and infrastructure must keep pace with growth, the environment must be protected, the economic benefits must be distributed more equitably across towns and communities, and tourism must be managed rather than merely promoted. The dominant growth preference is careful expansion with strong management, not aggressive volume growth. Across all three surveys, the desire to diversify beyond whale season, improve signage, and ensure that Stanford, Gansbaai, and Kleinmond receive equitable attention and investment runs as a consistent thread.

Concluding Remarks and the Path Forward

The evidence assembled across this study points towards a coherent and actionable set of priorities for the Overstrand Local Municipality. The foundational message is one of genuine strength: the municipality is widely acknowledged as one of the best-run in South Africa, its infrastructure and service delivery are exemplary by national standards, and its natural tourism assets (the ocean big five, world-class wine and gastronomy, spectacular fynbos, dramatic coastal scenery) are the envy of competing destinations. The challenge is not one of resource or reputation but of institutional organisation, strategic clarity, and deliberate investment in the enabling conditions for tourism to reach its potential.

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Ten recommendations are presented to address this challenge. They centre on sustaining and extending the quality of service delivery and infrastructure that forms the bedrock of the visitor experience; developing a clear destination identity and professional marketing function capable of repositioning the Overstrand as a year-round, multi-attraction destination at national and international trade levels; modernising and repurposing the tourism offices around digital engagement and active business facilitation; appointing a dedicated tourism bridge person to connect municipal processes with private sector needs; establishing a local hospitality skills database and training pipeline to address chronic staffing shortages; resolving the macro and micro signage crisis that currently undermines both brand coherence and business accessibility; tackling dedicated tour bus parking in Hermanus; and ensuring that the tourism development dividend is distributed equitably across all Overstrand towns. Taken together, these recommendations constitute a foundation for a forward-looking tourism policy that is evidence-based, community-endorsed, and fit for the competitive landscape of the decade ahead.

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Overstrand Tourism SWOT Analysis

Strengths

Exceptional **natural asset base** - the "ocean big five" (whales, sharks, penguins, seals, dolphins), world-class fynbos, dramatic coastline, and the Hemel-en-Aarde wine valley in a single compact geography.
product

Tourism **contributes 20.8% of local GDP** - eighth most tourism-dependent municipality in South Africa - with total spend reaching a record R2.85 billion in 2024 and leisure trips at their highest ever level.
economy

Strong international market with a 60/40 international-to-domestic split in Hermanus - a rare profile nationally - anchored by the UK, Germany, Netherlands, and surging US and Gulf markets. Strong VFR local market over Christmas period.
market

Municipal service delivery and infrastructure consistently praised as among the best in South Africa. Clean audits, effective Colab reporting, high civic cleanliness, and visible security build visitor and investor confidence.
governance

Double UNESCO accreditation - the Kogelberg Biosphere Reserve and Creative City of Gastronomy - provides internationally credible positioning assets that virtually no competitor can replicate.
brand

Diverse and established tourism ecosystem including wine estates, adventure activities, hiking, heritage, art, food culture, events, and a growing business travel segment - structural diversity that reduces, if not yet eliminates, single-attraction risk.
product

Strong post-COVID recovery with 75% of tourism businesses reporting a return to or exceeding 2019 performance levels by 2025, and high sector confidence (65% of tourism businesses are confident or very confident about the five-year outlook).
resilience

Weaknesses

Destination marketing is widely regarded as absent or ineffective. Nearly 40% of tourism businesses rate current marketing ineffective or very ineffective. The municipality has no visible presence at international trade shows where itineraries are designed 1–2 years in advance.
marketing

Over-reliance on whale watching as the dominant narrative suppresses visitor stay length (the persistent "one-night stopover" problem), concentrates economic benefit in October and the Hermanus CBD, and leaves wine, gastronomy, adventure, art and heritage effectively invisible to prospective visitors.
strategy

Tourism governance is institutionally adrift. A single permanent staff member runs four tourism offices. The Tourism Manager post has been vacant for years. A draft tourism strategy has remained unsigned for nearly five years. The "Cape Whale Coast" brand was discarded without a credible replacement.
governance

Regulatory barriers in planning, building approvals, and signage are experienced as hostile to investment. Signage applications take up to six months in some cases and the process is opaque, while building permits are described as bureaucratic obstacles rather than enabling processes.
regulation

Chronic **local skills shortage** forces tourism businesses to source management-level staff from Cape Town, depriving local communities of employment opportunity and raising business costs. No coordinated training or skills pipeline exists.
workforce

Geographic inequality in tourism development. Stanford, Gansbaai, and Kleinmond consistently report feeling marginalised relative to the Hermanus CBD in terms of marketing investment, municipal attention, and infrastructure maintenance.
equity

Rising housing costs are reducing long-term rental availability for tourism workers, with 60% of tourism businesses agreeing that property prices make it hard to attract staff who can afford to live locally - a structural labour constraint intensifying annually.
workforce

Opportunities

The UNESCO Creative City of Gastronomy accreditation is almost entirely unmarketed. Activated properly, it positions the Overstrand within a global network of culinary destinations and speaks directly to the fastest-growing segment of experiential, high-spend international travellers.
brand

Year-round destination repositioning. Building a multi-pillar offer around food, wine, art, events, fynbos, hiking, adventure, and marine wildlife, rather than whale season alone, could extend the tourist season, reduce extreme seasonality, and unlock bed nights and spend currently lost to the shoulder months.
strategy

A Destination Management Organisation (DMO) model, semi-independent, public-private governed, professionally led, is achievable within MFMA Circular 131 constraints through carefully structured tender briefs, as demonstrated by Visit Stellenbosch and Mossel Bay Tourism.
governance

Emerging international source markets - the US (boosted by direct Cape Town flights), Gulf states, and Russia - and surging domestic premium travel create new audience segments well-matched to Overstrand's existing wine, nature, and coastal product.
market

The Whale Festival and Stanford in Bloom are proven demand generators. A strategic events calendar built around these anchors and extended deliberately into shoulder months could smooth seasonality and broaden geographic spread of visitor spend.
events

Wesgro, SA Tourism, and Cape Country Routes offer provincial and national marketing leverage that the Overstrand is not currently accessing. Responsive engagement with these bodies, as Mossel Bay demonstrates, can dramatically extend international reach at minimal cost.
partnerships

A dedicated tourism skills pipeline linked to the high local unemployment rate would simultaneously address business staffing shortages and distribute the economic dividend of tourism more equitably into surrounding communities, a rare alignment of economic and social objectives.
workforce

Threats

Single-attraction ecological risk. Whale numbers fluctuate in the bay. The contraction of Gansbaai's shark cage diving sector with a 59% visitor decline after adverse species press, is a direct precedent for what happens when the primary draw diminishes without a diversified offer to absorb the shock.
product risk

Competitors are advancing faster. Mossel Bay, Kouga, and Saldanha Bay have recovered from COVID-19 more strongly in relative terms. Plettenberg Bay grew its events calendar from 11 to 145 annual events in twelve years. Better-organised peers are winning the visitors and tour operator relationships that the Overstrand is not actively pursuing.
competition

Water and electricity infrastructure constraints directly threaten destination quality and business viability. Load-shedding is rated as high or severe by 39% of tourism businesses and 52% of non-tourism businesses. Water supply issues affect 41% of tourism operators significantly. These are pre-competitive requirements, not differentiators, and their deterioration is reputationally damaging.
infrastructure

Unregulated short-term rental growth is eroding the commercial accommodation sector's viability, reducing long-term housing stock for workers, and generating rate income for the municipality without contributing to destination marketing or quality standards.
regulation

Rising **cost of long-haul travel,** particularly post-COVID air fares, may suppress the high-spending European "swallow" and independent traveller segments on which Overstrand's international bednight economy disproportionately depends.
market

Community tolerance for tourism growth is conditional, not unconditional. The resident survey is clear: traffic, environmental pressure, and inequitable benefit distribution are live grievances. If not managed, the risk is the emergence of resident opposition leading to a pattern well-documented in Barcelona, Lisbon, Venice, and parts of Cape Town that constrains future tourism policy options.
social licence

MFMA Circular 131 compliance requirements make it legally and reputationally difficult to fund independent tourism bodies directly. Without careful tender specification design, open procurement processes risk disrupting effective local tourism structures as has already occurred elsewhere in the Western Cape.
governance

The central strategic tension: The Overstrand holds a rare combination of world-class natural assets, a well-run municipal platform, and an established international visitor base, yet it is losing competitive ground to destinations with inferior assets but superior organisation.

The path forward is not to acquire what it lacks in nature; it is to close the institutional and marketing gap that is preventing existing strengths from converting into sustained economic performance. The SWOT points to one priority above all others: **move from a passive, service-delivery orientation to active destination management.**

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CONCLUDING REMARKS AND RECOMMENDATIONS

This study set out to investigate how the Overstrand Local Municipality can most effectively fulfil its role in supporting, enabling, and governing the tourism economy on which so much of its civic and commercial life depends. It has done so through a wide-ranging and methodologically diverse evidence base: a review of international and South African policy frameworks; a quantitative analysis of the Overstrand tourism economy benchmarked against comparable municipalities; 46 face-to-face interviews with tourism businesses and local government officials; comparative interviews with four Western Cape tourism offices and the provincial Department of Economic Development and Tourism; three large-scale surveys canvassing 183 tourism businesses, 73 non-tourism businesses, and 1 450 residents; and a synthesis of the two most recent secondary documents situating the Overstrand within its regional economic context.

The evidence assembled across these sources points consistently in the same direction. **The Overstrand is not a destination struggling with inadequate assets, a weak visitor base, or a failing economy. It is a destination of exceptional natural and cultural endowment, with a well-run municipal platform, a recovering and increasingly confident business community, and a resident population that is broadly and generously supportive of tourism's continued development. The challenge it faces is not one of resource poverty it is one of institutional organisation, strategic clarity, and deliberate investment in the enabling conditions that would allow its existing strengths to be fully converted into sustained economic performance. Ten recommendations emerge from the totality of this evidence**. They are presented not as an exhaustive action plan but as the ten most consequential interventions the municipality could make in the period ahead, those where the case is strongest, the need most urgent, and the potential return most significant.

Recommendation 1: *Sustain and Extend the Foundation of Service Delivery and Infrastructure*

The Overstrand Municipality's most important tourism asset is not a whale, a wine valley, or a UNESCO accreditation. It is **its reputation as one of the best-run local governments in South Africa.** Across the interviews, the surveys, and the comparative benchmarking, one finding recurs with remarkable consistency: visitors and businesses alike cite the quality of the Overstrand's basic service delivery, its infrastructure maintenance, street cleanliness, waste collection, and visible security, as a primary reason why the destination feels premium relative to alternatives. This is not a given. It is the product of consistent institutional discipline, and it must be actively maintained.

At the same time, the research identifies specific infrastructure gaps that have become material constraints on tourism competitiveness. Water supply and electricity reliability are rated as high or severe operational pressures by more than 40% of tourism businesses. Roads and traffic management divide the resident community almost evenly between satisfied and dissatisfied. Public ablution facilities are rated inadequate by more than 40% of residents. Tour bus parking in the Hermanus CBD remains unresolved after many years of discussion. These are not aspirational improvements they are the pre-competitive baseline requirements on which destination quality depends. Addressing them is the single most important signal the municipality can send to both its business community and its visitor market that it takes its stewardship role seriously.

Recommendation 2: Resolve the Signage Crisis at Both Macro and Micro Scale

Tourism signage in the Overstrand is rated as inadequate or very inadequate by nearly a third of tourism businesses, the weakest service dimension in the entire survey. The research reveals that the signage problem operates at two distinct but equally damaging levels.

At the macro scale, there is **no consistent regional identity in the physical landscape**. Visitors travelling through the Overstrand encounter a confusing array of names - Overstrand, Overberg, Whale Coast, Hermanus - rendered in inconsistent formats, faded colours, and varying sizes. There is no prominent arrival signage welcoming visitors to Hermanus at either town approach. The Hermanus Wine Route has no directional signage. The double UNESCO accreditation - the Kogelberg Biosphere Reserve and the Creative City of Gastronomy - is absent from most physical signage and most promotional material, representing a failure to leverage what are, in global destination marketing terms, exceptionally credible credentials.

At the micro scale, **individual businesses describe a bureaucratic process for obtaining tourism signage that is opaque, slow, and discouraging**. One business that successfully navigated the full application process was informed that its approved sign would take six months to install, an interval that is, as the interviewee observed, wholly unacceptable for a functioning commercial enterprise. The municipality should undertake an urgent audit of both the physical signage network and the internal approval process, with the explicit objective of reducing approval-to-installation time, standardising the regional visual identity, and ensuring that every significant tourism asset and business node in the Overstrand is clearly and confidently signposted.

Recommendation 3: Build a Professional, Digital-First Destination Marketing Function

Destination marketing is the most consistently and most strongly criticised dimension of the municipality's tourism function across every evidence source in this study. **Nearly 40% of tourism businesses rate current destination marketing as ineffective or very ineffective.** The municipality has no meaningful presence at the national or international trade shows where tour operators design itineraries twelve to eighteen months in advance. **The "Overstrand" brand carries no emotional or geographic resonance for prospective visitors**. And the destination's narrative, in the limited marketing that does exist, remains almost entirely captive to whale watching, leaving the wine valley, the gastronomy offerings, the adventure and hiking product, the heritage towns, the art and the fynbos landscape effectively invisible to anyone who has not already arrived.

The benchmark offices profiled in this study: Visit Stellenbosch, Mossel Bay Tourism, and Plett Tourism, share a common marketing approach that is instructive: they have moved decisively from broad, generalised destination advertising to disciplined, niche-specific storytelling, backed by professional digital and social media capacity, active trade relationships, and data-informed campaign investment. Mossel Bay manages a social media community of nearly 100 000 followers through outsourced specialist management. Plett Tourism operates five dedicated niche websites. Neither of these outcomes requires a large budget but they require a clear strategy and the professional capacity to execute it.

The Overstrand's **destination marketing function needs to be rebuilt around three pillars: a digital-first, narrative-driven brand strategy that communicates the full depth of the destination's offer to clearly defined visitor segments; a professional social media and content management capability, whether in-house or outsourced; and an active trade presence at key national and international platforms,** most urgently Cape Town's WTM Africa, and the national Indaba where operators, travel agents, and media professionals make the itinerary decisions that will determine visitor flows for years to come. Attendance and visibility at WESGRO and DEDAT workshops is also key.

The urgency of this recommendation is sharpened by competitive dynamics that are already in motion. Mossel Bay and Plettenberg Bay are actively building marine and whale associations events, sculptures and interpretation centres that could, over time, erode the distinctiveness of the Overstrand's marine identity in the minds of visitors and tour operators who have not yet formed strong destination loyalties. The window in which the Overstrand can claim its natural positioning as the home of the ocean big five, the world's most reliable land-based whale watching, shark cage diving and other marine interactions is narrowing. A professional destination marketing function, backed by a resolved brand identity and an active trade presence, is not merely a governance improvement. **It is a competitive necessity**.

Recommendation 4: Activate the UNESCO Creative City of Gastronomy Accreditation

Of all the unrealised strategic assets identified in this research, the **UNESCO Creative City of Gastronomy accreditation stands out as the most immediately actionable and the most disproportionately neglected.** It is a globally credible designation that places the Overstrand within a network of recognised culinary destinations spanning Parma, San Sebastián, Chengdu, and Ensenada. It speaks directly to the fastest-growing and highest-spending segment of international experiential travel. And it is almost entirely unknown, including, as the interview evidence reveals, to many of the food and wine businesses that would benefit most directly from its promotion.

Activating the accreditation does not require a large budget. It requires a decision to use it: to embed it in all marketing materials, signage, trade presentations, and press communications; to build a curated gastronomy itinerary that links the Hemel-en-Aarde and Stanford wine areas, the food culture, the Clarence Drive corridor, local seafood producers, and the regions artisan and restaurant scene into a coherent, marketable route; and to coordinate with Wesgro, DEDAT and SA Tourism to ensure the designation features in provincial and national destination marketing. Done well, this single initiative could do more to reposition the Overstrand as a year-round, high-yield destination than any volume-based marketing campaign.

Recommendation 5: Establish an Independent, Professionally Governed Destination Management Organisation

The comparative benchmarking at the heart of this study leads to one institutional conclusion above all others: **the structure of tourism governance is a primary determinant of destination competitiveness, and the Overstrand's current structure is not fit for the competitive environment it faces.**

The tourism office function is currently managed by a single permanent employee, supported by staff on rolling temporary contracts, within a directorate whose primary mandate is planning and development. The Tourism Manager post is vacant. A draft strategy has remained unsigned for nearly five years. The tourism office has no independent governance, no diversified funding base, no professional marketing mandate, and no structural mechanism for meaningful private sector participation in destination direction-setting.

The model that this study's benchmarking most clearly recommends is a semi-independent Destination Management Organisation (not merely marketing), governed by a public-private board with clear terms of reference, funded primarily by a municipal grant but supplemented by membership fees and project-based revenue, and staffed by a small, specialist professional team with an outward-facing marketing and business facilitation mandate. This structure is achievable within the constraints of MFMA Circular 131 through carefully designed tender specifications as Stellenbosch, Mossel Bay, and Plettenberg Bay have each demonstrated. It does not require the municipality to relinquish accountability or oversight; it requires it to create the conditions in which a professional tourism body can operate with the agility and private sector trust that a purely in-house model cannot generate.

Recommendation 6: *Appoint a Dedicated Tourism Bridge Person*

Across the interview evidence, one need is expressed with greater frequency and greater frustration than almost any other: **the absence of a dedicated, accessible, human point of contact between the municipality's processes and the private sector's needs**. The role that interviewees describe variously called a "bridge person," a "go-to," a "liaison," and a "champion" is not a senior strategic position. It is a relationship role: someone who knows the businesses, understands the municipal systems, can navigate the bureaucracy on behalf of operators, flags emerging issues to management, and communicates proactively rather than reactively.

The Municipal Manager himself acknowledges the gap directly: "They want a go-to and that gap is felt." This is among the most straightforward of the ten recommendations to act on. It does not require a governance restructure or a strategy sign-off. It requires the political will to formalise and fill a function that has been missing since the departure of the last tourism liaison, and to resource it with the operational latitude and business-community access that the role demands.

Recommendation 7: *Build a Local Hospitality Skills Pipeline*

Staffing is the single most consistently cited operational challenge across the tourism business interview sample. **Businesses of every category: accommodation, restaurants, wine farms, attractions, adventure operators, report difficulty finding locally based candidates with the training and experience required for management and specialised hospitality roles**. The consequence is that management-level staff are routinely sourced from Cape Town, at higher cost and with no local community benefit. In a municipality with high unemployment, this represents a significant and persistent market failure.

The solution does not require a new institution. The MERO confirms that 21 learners each from Hermanus and Gansbaai have already been recruited into hospitality-related skills development programmes which is proof that the partnerships and community appetite for this kind of investment exist. What is needed is scale, coordination, and communication. The municipality should work with local further education institutions, established hospitality businesses, and provincial skills development agencies to design a structured local training pipeline, linked to a centralised database of locally available hospitality candidates that businesses can access directly. The Municipal Manager notes that such a database already exists in partial form within municipal systems but that businesses are not aware of it or engaging with it. Closing this awareness gap is itself an immediate priority.

Recommendation 8: *Develop a Coordinated Events Strategy for the Full Overstrand Calendar*

Events are the most powerful available tool for extending the tourist season, generating off-peak demand, and distributing visitor footfall beyond the Hermanus CBD and beyond the October whale season peak. The evidence for this is clear and consistent. The Hermanus Whale Festival generated an estimated R90 million in visitor spend in 2025. Stanford in Bloom sold 19 560 tickets. Plett Tourism grew its annual events calendar from 11 events in 2013 to 145 by 2025, demonstrably extending average visitor stay from 2.75 to 3.5 nights in the process.

The Overstrand has the raw ingredients for an equally compelling events programme, but presently they are uncoordinated, under-promoted, and disconnected from a coherent seasonal strategy. **More than half of resident survey respondents identify developing more off-season events as the single most important measure for improving the tourism-resident relationship. More than 40% of tourism businesses call for more diverse event types, earlier advance promotion, and stronger coordination with local businesses.**

The municipality should commission the development of a formal annual events calendar for the full Overstrand geography, structured deliberately to spread programming across the year and across all towns. This calendar should be published well in advance, shared proactively with all accommodation businesses so that advance booking can be maximised, and used as the primary vehicle for communicating the destination's year-round appeal to both domestic and international trade partners.

This strategy must also address the current ambivalence that surrounds the Overstrand's most important event. The Hermanus Whale Festival is indispensable its R90 million visitor spend and 85 000 attendees in 2025 (Hermanus Whale Festival 2025 Feedback and Impact Report) anchor the entire tourism calendar but the business community's evidence is clear that it needs to be refreshed: broadened in its local business inclusion, more carefully managed in terms of parking and access during setup and breakdown, and progressively repositioned to attract the nature-focused, higher-spending visitor that the destination's premium offering demands. A coordinated events strategy is the appropriate vehicle for this reimagining not as a challenge to the Festival's primacy, but as the framework within which it can evolve alongside a growing calendar of complementary events that distribute economic benefit more equitably across the year, across the geography, and across the full business community.

Recommendation 9: Address Geographic Inequity in Tourism Investment and Marketing

The sense of **marginalisation felt by businesses and residents in Stanford, Gansbaai, Hangklip-Kleinmond, and the smaller outlying settlements** is one of the most persistent and emotionally resonant themes in this study. It surfaces in the interviews, in the survey open-ended responses, in the resident data, and in the comparative marketing analysis. The concern is not that these towns lack tourism merit as in several cases they have distinctive and genuinely world-class assets. It is that they are effectively invisible in the Overstrand's marketing narrative, under-represented in the tourism office's operational attention, and increasingly anxious that the municipality's frame of reference begins and ends at the Hermanus CBD.

The recommendation is straightforward but requires deliberate commitment: every significant tourism policy decision, marketing investment, product development initiative, and infrastructure improvement should be assessed explicitly against its geographic distribution of benefit. **The destination management structure recommended above should have explicit representation from each major node. Marketing budgets should reflect the geographic spread of the destination's offer. And the tourism strategy that the municipality is now positioned to finalise should contain a specific and measurable commitment to equitable investment across all Overstrand towns.**

Stanford offers the clearest proof of concept for what targeted investment in a non-Hermanus node can achieve. The Stanford in Bloom festival developed from a community and business initiative

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linked to the Chelsea Flower Show's South African fynbos exhibit, sold 19 560 tickets in 2025, generated both temporary and permanent local employment, and has given Stanford a coherent and distinctive identity as a green, fynbos-focused, heritage and gastronomy destination. It runs for two weeks outside the school holiday window, introducing a new commercial season at a time when the coastal towns are not yet at their peak. This was achieved without significant municipal marketing investment. With it, Stanford's potential as a year-round, high-quality destination node is complementary and rather than competing with the marine offerings of Hermanus and Gansbaai it could be substantially greater. The same logic applies to the emerging fynbos programming in Kleinmond and around Fernkloof, and to the marine-heritage and seafood identity that Gansbaai is capable of building if its cliff path and harbour is rehabilitated and its broader product is invested in seriously.

Recommendation 10: Reposition the Overstrand as a Year-Round, Multi-Attraction Destination

All nine preceding recommendations are, in a sense, instrumental to this tenth and most encompassing one. **The Overstrand's most significant strategic vulnerability is its continued dependence on a single seasonal attraction of whale watching as the primary driver of its destination identity and its visitor economy**. The risks of this dependence have been documented at length in this study. The contraction of Gansbaai's shark cage diving sector over a decade following adverse species press, is not a cautionary tale from a distant destination. It happened within, and it illustrates with painful clarity what happens when a community's tourism economy is built on a single natural phenomenon that is beyond its control.

The strategic reorientation required is not a rejection of whale watching as it remains the most powerful hook the Overstrand has for initial international awareness. It is a deliberate broadening of the destination's narrative and product offerings, so that visitors who come for the whales stay for the wine, return for the gastronomy, bring their families for the beaches and the fynbos, and recommend the Overstrand to friends looking for an adventure or a festival or a slow-travel escape. The assets to build this narrative already exist. The Hemel-en-Aarde Valley produces wine of international standard. The Stanford heritage and food scene is distinctive and genuinely special. The Overstrand coastline from Pringle Bay to Pearly Beach is among the most spectacular in the country. The Kogelberg Biosphere is a biodiversity asset of global significance. The UNESCO gastronomy credential connects the destination to a global community of culinary tourism.

Underpinning all of this is a natural narrative that the Overstrand has not yet fully claimed: the convergence of the ocean big five and the fynbos floral kingdom in a single, compact, accessible destination. No competitor in South Africa (and very few in the world) can offer visitors the experience of watching whales from a cliff path that runs adjacent to a UNESCO Biosphere Reserve, followed by a meal at a restaurant in a Creative City of Gastronomy, followed by a wine tasting in a valley that produces bottles served in restaurants in Paris and New York. The ingredients for a world-class, year-round destination narrative are not aspirational. They are already here. What has been missing is the institutional will and the marketing capacity to tell that story coherently, consistently, and to the audiences who are most likely to respond to it. Closing that gap is ultimately what this report is about.

What has been missing is not the product but the will and the institutional capacity to package, promote, and sustain a more ambitious and diversified destination narrative. This study has set out to provide the evidence base and the comparative benchmarking on which that ambition can be grounded. The recommendations above provide the framework through which it can be acted on.

What they require, above all, is a decision by the Overstrand Local Municipality to match the quality of its natural assets and its service delivery with a tourism governance model that is equal to the opportunity those assets represent.

Conclusion

The **Overstrand stands at a genuine inflection point. It has the assets, the civic platform, and the community support to become one of the most compelling and best-managed tourism destinations in South Africa.** What it has lacked, for long enough that the gap has become strategically significant, is the institutional structure, the marketing capacity, and the strategic direction required to make that potential a sustained reality.

The ten recommendations presented in this chapter are not a wish list. They are evidence-based, community-endorsed, benchmarked against the practices of comparable destinations, and calibrated to the legal and institutional constraints within which the Overstrand Municipality operates. Several can be acted on immediately and at low cost. Others require structural decisions that will take longer to implement but that, once made, will fundamentally change the trajectory of the destination. None is beyond the reach of a municipality with the Overstrand's track record, resources, and reputation.

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ANNEXURE A - QUESTIONNAIRE

The Role of Overstrand Municipality (OM): Local Government and Tourism Businesses

Relationship with local government

- Positive experiences with local government in relation to your business
- Negative experiences with local government in relation to your business
- How do you see a way around these?

Business performance over the past 2 years:

- How has your business performed?
- What was most important factor behind the improvement/decline of business?
- What have been the major challenges of your business?
- In what way did actions of OM assist or not the problems/challenges of your business?
- Is there anything specific that OM could have done that would have improved your business?

Your Business and profile of tourists and tourism:

- % foreign and local
- Families, couples, groups
- Visited Overstrand as an independent or with a tour group or tour organizer
- Time of year
- Length of stay
- Repeat visits
- Transport - Car, tour bus. other
- Type of tourism your visitors are interested in. Role/growth of business tourism in OM
- How aware are they of the variety of tourism offerings in Overstrand (eco/adventure/gastronomy/art/sun and sand)
- How does your business respond to seasonality
- When is your high, shoulder and low seasons – has this shifted over past 5 years?
- How do visitors book their stay (online, agent, direct)?
- How do you advertise your business?
- Events
- Business tourism
- UNESCO accreditation
- Employees

Marketing:

- How well do you think the Overstrand is marketed?
- Do you or your guests use the Tourism Office?
- Is the Hermanus or other Overstrand tourism offices effective in marketing the area?
- If no what would you like to see. Is Overstrand a destination or Hermanus/Whale Coast

Expectations:

- What are your expectations of what local government (OM) should be doing for your business and the Overstrand tourism economy? What do you see as their role?

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ANNEXURE B - QUESTIONNAIRE

Overstrand Tourism Businesses Survey: Detailed Results

Section A - About Your Business

Q1. What type of business do you operate?

- Self-catering / holiday rental - 30.6%
- Accommodation (hotel / guesthouse / B&B) - 26.2%
- Restaurant / café / bar - 21.3%
- Adventure / eco tourism - 10.9%
- Guiding - 8.2%

Q2. How long has your business been operating?

- More than 10 years - 45.9%
- 4–10 years - 29.5%
- 1–3 years - 17.5%
- Less than 1 year - 7.1%

Q3. How many full-time equivalent (FTE) staff do you employ?

- 1–5 staff - 57.4%
- None (owner-operated / no staff) - 17.5%
- 6–15 staff - 16.4%
- 16–30 staff - 3.3%
- 31–50 staff - 3.3%
- 51+ staff - 2.2%

Q4. How many part-time / seasonal staff do you employ?

- Less than 25% - 78.7%
- 25–50% - 6.3%
- 51–75% - 2.3%
- 0 - 2.3%

Q5. What proportion of your annual revenue is derived from tourism?

- 76–100% - 42.6%
- Less than 25% - 21.3%
- 25–50% - 19.1%
- 51–75% - 16.9%

Section B - Visitor Profile & Seasonality

Q6. Which visitor segments account for the largest share of your customers? (Select up to 3)

- International overnight visitors - 67.2%
- Domestic overnight visitors - 61.7%
- Domestic day visitors - 36.1%
- International day visitors - 32.8%
- Whale-watching tourists - 30.6%

- Retiree / long-stay visitors - 29.0%
- Adventure / sports tourists - 25.7%
- Gastronomy tourists - 23.0%

Q7. How would you describe your business's current seasonality pattern?
- Moderately seasonal - clear peak and quiet periods - 57.9%
- Very seasonal - most revenue in 2–3 months - 18.6%
- Relatively consistent - steady throughout the year - 13.7%
- Growing year-round - 8.7%

Q8. The whale season is critical to my business
- Neutral - 35.0%
- Agree - 25.7%
- Strongly agree - 14.8%
- Disagree - 16.9%
- Strongly disagree - 7.7%

Section C - Infrastructure & Operations
Q9. How do infrastructure challenges affect your business operations?
Traffic congestion on main routes
- Low Impact - 32.2%
- Moderate Impact - 27.3%
- No Impact - 19.7%
- High Impact - 16.4%
- Severe Impact - 4.4%

Lack of sufficient public / visitor parking
- No Impact - 29.5%
- Low Impact - 27.3%
- Moderate Impact - 20.2%
- High Impact - 14.2%
- Severe Impact - 8.7%

Load-shedding / electricity supply unreliability
- Low Impact - 21.9%
- High Impact - 21.3%
- Moderate Impact - 21.3%
- No Impact - 18.0%
- Severe Impact - 17.5%

Water supply constraints / restrictions
- Low Impact - 23.5%
- High Impact - 20.8%
- Severe Impact - 20.2%
- No Impact - 19.7%
- Moderate Impact - 15.8%

Poor road condition / maintenance

- Low Impact - 29.0%
- Moderate Impact - 21.9%
- High Impact - 19.7%
- No Impact - 18.6%
- Severe Impact - 10.9%

Inadequate public transport / shuttle options

- Low Impact - 29.5%
- Moderate Impact - 24.6%
- No Impact - 21.3%
- High Impact - 18.0%
- Severe Impact - 6.6%

Insufficient pedestrian infrastructure

- Low Impact - 34.4%
- No Impact - 34.4%
- Moderate Impact - 18.0%
- High Impact - 7.7%
- Severe Impact - 5.5%

Q10. How do you currently manage peak-season congestion impacts?

- Pre-booking / reservation systems - 49.2%
- We do not take any specific measures - 36.6%
- Staff increase during peak periods - 30.1%
- Shuttle / parking partnership arrangements - 10.9%
- Redirect customers to less congested access points - 8.7%

Q11. Please rate the adequacy of the following local services and infrastructure

Broadband / fibre connectivity

- Adequate - 44.8%
- Very Adequate - 22.4%
- Neutral - 19.7%
- Inadequate - 9.3%
- Very Inadequate - 3.8%

Municipal waste collection

- Adequate - 39.3%
- Very Adequate - 31.1%
- Neutral - 21.3%
- Inadequate - 5.5%
- Very Inadequate - 2.7%

Tourism signage and wayfinding

- Adequate - 33.3%
- Neutral - 25.7%
- Inadequate - 23.0%
- Very Adequate - 10.9%
- Very Inadequate - 7.1%

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Local Emergency & Safety services

- Adequate - 48.1%
- Very Adequate - 23.0%
- Neutral - 21.3%
- Inadequate - 5.5%
- Very Inadequate - 2.2%

Section D - Housing, Labour & Community

Q12. Do you find it difficult to recruit and retain staff locally?

- No difficulty at all - 29.8%
- Somewhat difficult - 22.1%
- Not particularly difficult - 22.1%
- Yes, very difficult - 19.3%

Q13. Housing statements

Rising property prices make it hard to attract staff

- Agree - 33.3%
- Strongly agree - 26.8%
- Neutral - 25.7%
- Disagree - 7.1%
- Strongly disagree - 7.1%

Short-term rental platforms reduce long-term rental supply

- Neutral - 36.1%
- Agree - 27.3%
- Strongly agree - 14.8%
- Disagree - 10.9%
- Strongly disagree - 10.9%

The housing situation is negatively affecting the local workforce

- Neutral - 38.3%
- Agree - 30.1%
- Strongly agree - 15.3%
- Disagree - 10.4%
- Strongly disagree - 6.0%

Municipal housing policy should better support essential tourism sector workers

- Neutral - 44.8%
- Agree - 32.8%
- Strongly agree - 14.8%
- Disagree - 4.9%
- Strongly disagree - 2.7%

Q14. How does tourism growth affect community relations?

- Very positively - brings prosperity and pride - 48.1%
- Mostly positively - benefits outweigh negatives - 36.1%
- Mixed - some benefits, some tensions - 14.2%

- Mostly negatively - causing community stress - 1.1%
- One custom negative response about motorbikes - 0.5%

Section E - Destination Management & Marketing
Q15. How effective is the current marketing of your town / area?

- Somewhat effective - 27.9%
- Very ineffective - 19.7%
- Somewhat ineffective - 19.1%
- Neutral - 18.6%
- Very effective - 14.8%

Q16. Which should be the top priorities for Tourism Management? (Select up to 3)

- Extend the tourist season beyond whale season - 62.8%
- Promote Overstrand as a year-round food & wine destination - 60.1%
- Develop adventure / eco-tourism offerings - 46.4%
- Attract higher-spending / premium tourists - 39.9%
- Improve infrastructure before growing visitor numbers - 37.2%
- Strengthen environmental sustainability credentials - 37.2%
- Develop conference & business tourism - 32.8%
- Promote cultural heritage & township tourism - 25.1%

Q17. Do you participate in any formal tourism association, Business Chamber, or industry body?

- Yes, occasionally - 29.5%
- No, but I would like to - 27.3%
- No, not interested - 24.0%
- Yes, actively - 19.1%

Q18. What is the single most important action Tourism Management could take to support your business?

- Marketing & promotion - 63 mentions
- Infrastructure & municipal services - 43
- Events & season extension - 21
- Stronger inclusion of places beyond Hermanus - 17
- Safety & law enforcement / by-law enforcement - 13
- Skills / housing / workforce - 9
- Environment / sustainability - 8
- Funding / budget / investment - 6
- Regulation / Airbnb - 4

Illustrative respondent quotes:
"Promote Overstrand as a destination of choice, more bums in beds."
"Ensure consistent enforcement of all municipal bylaws and policies across all tourism businesses."
"At least place Baardskeerdersbos on some map"

"Communication and visibility"
"Acknowledge the vital role tourism plays specifically in the Overstrand and allocate more priority and budget to growing this sector in line with international standards."

Section F - Tourism Events
Q19. How much do tourism events benefit your business?
- Moderate Benefit - 30.1%
- Slight Benefit - 24.0%
- No Benefit - 21.9%
- Significant Benefit - 14.2%
- Very Significant Benefit - 9.8%

Q20. Which types of tourism events generate the most trade for your business?
- Holiday and school-break events - 50.8%
- Sporting events - 33.9%
- Food, wine & culinary festivals - 32.8%
- Wildlife / nature events (e.g. Whale Festival) - 31.7%
- Arts, culture & music events - 27.3%
- Markets and craft fairs - 24.6%
- None - events do not noticeably affect my business - 23.5%
- Corporate conferences and business events - 21.3%

Q21. How well are tourism events planned and managed?
Advance notice and communication to local businesses
- Average - 33.9%
- Well - 26.8%
- Poorly - 24.6%
- Very poorly - 8.7%
- Very well - 6.0%

Traffic and crowd management during events
- Average - 42.1%
- Well - 31.1%
- Poorly - 14.2%
- Very well - 8.2%
- Very poorly - 4.4%

Coordination between event organisers and local businesses
- Average - 41.5%
- Poorly - 20.2%
- Very poorly - 18.6%
- Well - 16.9%
- Very well - 2.7%

Post-event economic impact for the wider business community
- Average - 49.7%
- Poorly - 24.6%
- Well - 12.0%

- Very poorly - 10.4%
- Very well - 3.3%

Environmental management and clean-up

- Well - 43.2%
- Average - 35.0%
- Very well - 9.8%
- Poorly - 9.3%
- Very poorly - 2.7%

Q22. What is your view on the current volume and frequency of tourism events?

- Too few - more events would benefit the town - 37.7%
- About right - maintain the current level - 24.0%
- Too many during peak season - spread them more evenly - 20.8%
- No strong view - 16.9%
- Too many overall - 0.5%

Q23. Which would most improve the impact of tourism events on your business? (Select up to 2)

- More events scheduled in the off-season - 54.1%
- More diverse event types to attract different visitor profiles - 45.9%
- Earlier and better advance promotion to drive bookings - 43.7%
- A coordinated local business participation programme - 38.3%
- A dedicated events liaison contact for local businesses - 27.3%
- Improved event infrastructure (staging, signage, ablutions) - 23.5%

Section G - Looking Ahead

Q24. How confident are you in the 5-year business outlook for your operation?

- Confident - 39.3%
- Very confident - 25.7%
- Neutral - 20.2%
- Very unconfident - 9.3%
- Unconfident - 5.5%

Q25. Are there any other issues or opportunities related to tourism in your area that you would like to raise?

- Infrastructure & municipal services - 39 mentions
- Events & season extension - 30
- Marketing & promotion - 27
- Safety / security - 22
- Better inclusion of non-Hermanus areas - 21
- Skills / workforce / housing - 7
- Environment / sustainability - 5
- Funding / budget - 4
- Regulation / Airbnb - 4

ANNEXURE C - QUESTIONNAIRE

Overstrand Non-Tourism Businesses Survey: Detailed Results

Section A – Business Profile

Q1. In which town do you operate your business?

- Greater Hermanus area **-53.4%**
- Hangklip-Kleinmond area **-17.8%**
- Greater Gansbaai area **-16.4%**
- Stanford area **-12.3%**

Q2. Which sector best describes your business?

Respondents could select more than one sector; free-text entries are grouped under "Other professional / business services". Percentages sum to more than 100%.

- Other professional / business services **-39.7%**
- Retail **-19.2%**
- Construction / property development **-15.1%**
- Healthcare / medical / dental **-9.6%**
- Real estate / property management **-8.2%**
- Education **-6.8%**
- Technology / IT services **-5.5%**
- Agriculture / farming / wine estate **-5.5%**
- Manufacturing / light industry **-4.1%**
- Automotive / vehicle services **-4.1%**
- Logistics / transport / freight **-2.7%**
- Legal / accounting / financial services **-2.7%**

Q3. How long has your business been operating?

- 6-15 years **-32.9%**
- More than 15 years **-31.5%**
- 2-5 years **-24.7%**
- Less than 2 years **-11.0%**

Q4. How many full-time equivalent staff do you currently employ?

- 1-5 **-84.9%**
- 6-15 **-8.2%**
- 16-30 **-4.1%**
- 31-50 **-2.7%**

Q5. Where is your business primarily located?

- Other location / suburb (specified) **-41.1%**
- Town centre / CBD **-31.5%**
- Suburbs (specify in 'other') **-15.1%**
- Industrial area **-11.0%**
- Online **-1.4%**

Section B – Relationship to Tourism

Q6. To what extent does the tourism industry affect your business – directly or indirectly?

- Minor indirect effect (e.g. general town economy) **-39.7%**
- No effect - our business is entirely independent of tourism **-24.7%**
- Moderate effect - tourism noticeably influences your trade **-20.5%**
- Significant effect - tourism is a key factor in our business **-15.1%**

Q7. Does your business experience noticeable peaks and troughs linked to the tourist seasons?

- No - our demand is consistent year-round **-41.1%**
- Yes - mild seasonal variation **-35.6%**
- Yes - significant seasonal swings in demand / revenue **-20.5%**
- Our busy season runs counter to the tourist season **-2.7%**

Q8. Do tourists or tourism-related businesses form part of your customer or client base?

- Occasionally / incidentally **-30.1%**
- No - our clients are predominantly local residents and businesses **-24.7%**
- Yes - we serve tourism businesses (suppliers, contractors, etc.) **-23.3%**
- Yes - tourists are a meaningful share of our clients **-21.9%**

Q9. Has tourism growth over the past 5 years had a net positive or negative effect on your business?

- Neutral / No Effect **-41.1%**
- Positive **-39.7%**
- Very Positive **-12.3%**
- Negative **-5.5%**
- Other / mixed (free-text) **-1.4%**

Section C – Infrastructure & Operational Challenges During Peak Periods

Q10. How do the following infrastructure and operational challenges affect your business during peak tourist periods? (1 = No Impact, 5 = Severe Impact)

Traffic congestion making access difficult for staff

- Moderate impact **-32.9%**
- Minor impact **-27.4%**
- No impact **-23.3%**
- Significant impact **-8.2%**
- Severe impact **-8.2%**

Parking availability for staff and clients

- No impact **-32.9%**
- Minor impact **-27.4%**
- Significant impact **-16.4%**
- Severe impact **-12.3%**
- Moderate impact **-11.0%**

Load-shedding / electricity supply disruptions

- Severe impact **-28.8%**

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- Minor impact **-26.0%**
- Significant impact **-23.3%**
- Moderate impact **-15.1%**
- No impact **-6.8%**

Water supply constraints or restrictions

- Minor impact **-27.4%**
- Significant impact **-21.9%**
- Moderate impact **-19.2%**
- No impact **-17.8%**
- Severe impact **-13.7%**

Increased cost of goods and services locally

- Moderate impact **-30.1%**
- Severe impact **-23.3%**
- Significant impact **-21.9%**
- Minor impact **-17.8%**
- No impact **-6.8%**

Delivery and logistics delays due to congestion

- Moderate impact **-31.5%**
- Minor impact **-30.1%**
- No impact **-17.8%**
- Significant impact **-12.3%**
- Severe impact **-8.2%**

Road conditions and maintenance

- Minor impact **-30.1%**
- Moderate impact **-24.7%**
- No impact **-19.2%**
- Significant impact **-17.8%**
- Severe impact **-8.2%**

Strain on local emergency and municipal services

- Moderate impact **-30.1%**
- No impact **-27.4%**
- Minor impact **-23.3%**
- Severe impact **-11.0%**
- Significant impact **-8.2%**

Section D – Operating Costs

Q11. Have your business operating costs increased in ways you attribute to tourism-driven demand?

- No noticeable change in costs **-68.5%**
- Unsure **-16.4%**
- Yes - somewhat higher costs **-9.6%**
- Yes - significantly higher costs **-4.1%**
- Our costs have decreased due to increased local economic activity **-1.4%**

Section E – Adequacy of Local Infrastructure

Q12. How adequate is the current local infrastructure for the needs of non-tourism businesses like yours? (1 = Very Inadequate, 5 = Very Adequate)

Road network and freight access routes

- Adequate **-38.4%**
- Neutral **-32.9%**
- Very Adequate **-11.0%**
- Inadequate **-11.0%**
- Very Inadequate **-6.8%**

Broadband / fibre connectivity

- Adequate **-47.9%**
- Neutral **-26.0%**
- Very Inadequate **-9.6%**
- Very Adequate **-8.2%**
- Inadequate **-8.2%**

Industrial and commercial zoning / space availability

- Neutral **-38.4%**
- Adequate **-24.7%**
- Inadequate **-17.8%**
- Very Inadequate **-12.3%**
- Very Adequate **-6.8%**

Municipal waste and recycling services

- Adequate **-46.6%**
- Neutral **-28.8%**
- Very Adequate **-21.9%**
- Very Inadequate **-2.7%**

Public safety and policing

- Adequate **-31.5%**
- Neutral **-26.0%**
- Very Adequate **-19.2%**
- Inadequate **-15.1%**
- Very Inadequate **-8.2%**

Reliable water and electricity supply

- Adequate **-46.6%**
- Very Adequate **-19.2%**
- Neutral **-17.8%**
- Inadequate **-9.6%**
- Very Inadequate **-6.8%**

Section F – Housing & Staff

Q13. To what extent has the rising cost of residential property affected your ability to attract and keep staff?

- No Effect **-28.8%**
- Significant Effect **-23.3%**

- Moderate Effect **-21.9%**
- Slight Effect **-16.4%**
- Severe Effect **-9.6%**

Q14. Do you agree that short-term rental platforms (e.g. Airbnb) are reducing the availability of long-term rental accommodation for your employees?

- Neutral / Unsure **-41.1%**
- Agree **-28.8%**
- Strongly Agree **-15.1%**
- Disagree **-9.6%**
- Strongly Disagree **-5.5%**

Section G – Municipal Management & Policy

Q15. How satisfied are you with the Overstrand Municipality's management of the following (balancing tourism growth with the needs of non-tourism businesses)?

Business Rates and Municipal Levies

- Neutral **-49.3%**
- Somewhat dissatisfied **-17.8%**
- Somewhat satisfied **-15.1%**
- Very satisfied **-11.0%**
- Very dissatisfied **-6.8%**

Commercial Zoning and Planning Approvals

- Neutral **-47.2%**
- Somewhat satisfied **-19.4%**
- Somewhat dissatisfied **-19.4%**
- Very dissatisfied **-13.9%**

Road Maintenance and Traffic Management

- Neutral **-32.9%**
- Somewhat satisfied **-30.1%**
- Very satisfied **-16.4%**
- Somewhat dissatisfied **-15.1%**
- Very dissatisfied **-5.5%**

Water and Electricity Supply and Reliability

- Neutral **-35.2%**
- Very satisfied **-28.2%**
- Somewhat satisfied **-21.1%**
- Very dissatisfied **-9.9%**
- Somewhat dissatisfied **-5.6%**

Business Support and Economic Development Services

- Somewhat dissatisfied **-32.9%**
- Neutral **-30.1%**
- Somewhat satisfied **-16.4%**
- Very dissatisfied **-11.0%**
- Very satisfied **-9.6%**

Responsiveness to Non-Tourism Business Concerns

- Neutral **-35.6%**
- Somewhat dissatisfied **-32.9%**
- Somewhat satisfied **-13.7%**
- Very dissatisfied **-9.6%**
- Very satisfied **-8.2%**

Q16. Do you feel that municipal policy and investment disproportionately favours the tourism sector over other businesses?

- Yes - to some degree **-35.6%**
- No - the balance is about right **-23.3%**
- Unsure / no strong view **-16.4%**
- Yes - strongly, and it disadvantages us **-12.3%**
- No - all sectors face similar levels of under-support **-11.0%**
- No - all sectors are underserved equally **-1.4%**

Q17. Does your business participate in any local business association, chamber of commerce, or industry body?

- No, but I would like to **-38.4%**
- Yes, occasionally **-30.1%**
- No, not interested **-16.4%**
- Yes, actively **-13.7%**
- Other (specified) **-1.4%**

Section H – Growth & Outlook

Q18. In your view, should Overstrand seek to grow visitor numbers over the next 5 years?

- Yes - cautious growth, provided infrastructure investment keeps pace **-41.1%**
- Yes - strong growth; the economic benefits outweigh the costs **-34.2%**
- Maintain current levels - manage better, not bigger **-17.8%**
- Reduce visitor numbers - the strain on the town is too great **-4.1%**
- Unsure/don't care **-2.7%**

Q19. Which of the following would most benefit non-tourism businesses? (Select up to 3)
Multiple selections allowed; percentages sum to more than 100%.

- Improved public safety and security services **-46.6%**
- Dedicated economic development support for non-tourism sectors **-42.5%**
- Municipal support for affordable staff housing **-35.6%**
- Investment in road and transport infrastructure **-34.2%**
- Incentives to attract new employers and industries to the area **-32.9%**
- Streamlined planning and business licensing processes **-27.4%**
- Faster and cheaper broadband connectivity **-24.7%**

Q20. How confident are you in the 5-year business outlook for your operation?

- Confident **-46.6%**
- Very Confident **-26.0%**

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- Neutral **-16.4%**
- Unconfident **-6.8%**
- Very Unconfident **-4.1%**

ANNEXURE D - QUESTIONNAIRE

Overstrand Resident Tourism Survey: Detailed Results

Section A - Respondent Profile

Q1. How long have you lived in Overstrand?

- More than 15 years -32.0%
- 6-15 years -31.7%
- 2-5 years -22.3%
- Born and raised here -7.3%
- Less than 2 years -6.8%

Q2. What is your current employment situation?

- Retired -44.8%
- Self-employed / business owner -28.6%
- Employed in another local sector -16.5%
- Employed in tourism / hospitality -5.5%
- Unemployed / seeking work -3.9%
- Student -0.8%

Q3. Does your household income depend, even partly, on the tourism industry?

- No direct connection -66.1%
- Yes, partially -21.8%
- Yes, primarily -8.4%
- Unsure -3.7%

Section B – Hosting Friends & Relatives

Q4. Have you hosted friends or relatives at your home over the past few years?

- Yes -91.2%
- No -8.8%

Q5. If yes, what time of year do they stay with you? (Select all that apply)

(Multiple selections allowed; percentages sum to more than 100%.)

- Christmas or Easter -67.6%
- Outside of peak periods -64.6%
- School holidays -40.1%

Q6. How often do they stay?

- More than once a year -55.1%
- infrequently -26.8%
- Once a year -18.1%

Q7. How long do they stay?

- 1-6 days -65.7%
- 1-4 weeks -32.0%
- Longer than a month -2.3%

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Q8. Where are they from?

- South Africa -50.9%
- Both -42.8%
- International -6.3%

Section C – Tourism & Quality of Life
Q9. Overall, how does tourism affect your quality of life in Overstrand?

- Neutral / Mixed -38.8%
- Positively -36.6%
- Very Positively -17.5%
- Negatively -5.6%
- Very Negatively -1.4%

Q10. How do the following aspects of tourism affect your day-to-day life during tourist season?

Traffic congestion and parking

- Neutral -40.2%
- Negative impact -31.1%
- Very negative impact -14.3%
- Positive impact -9.1%
- Very positive impact -5.3%

Crowding in public spaces, beaches, and the cliff path

- Neutral -52.3%
- Negative impact -20.7%
- Positive impact -16.6%
- Very negative impact -6.2%
- Very positive impact -4.1%

Noise levels in residential areas

- Neutral -64.1%
- Negative impact -18.1%
- Positive impact -8.7%
- Very negative impact -5.7%
- Very positive impact -3.4%

Access to local restaurants, shops, and services

- Neutral -51.0%
- Negative impact -21.0%
- Positive impact -18.3%
- Very positive impact -6.1%
- Very negative impact -3.7%

General atmosphere and vibrancy of the town

- Positive impact -50.0%
- Very positive impact -23.5%
- Neutral -21.4%
- Negative impact -4.0%

- Very negative impact -1.0%

Environmental condition of beaches and open spaces

- Neutral -38.6%
- Positive impact -28.3%
- Negative impact -19.7%
- Very positive impact -9.7%
- Very negative impact -3.8%

Pride in how Overstrand is perceived externally

- Positive impact -46.8%
- Very positive impact -29.1%
- Neutral -19.0%
- Negative impact -4.6%
- Very negative impact -0.6%

Section D – Attitudes Towards Tourism

Q11. In favour of building new tourism facilities that will attract more tourists

- Agree -34.2%
- Strongly Agree -21.0%
- Neutral -18.6%
- Disagree -15.7%
- Strongly Disagree -10.6%

Q12. The overall benefits of tourism outweigh the negative impacts

- Agree -42.6%
- Strongly Agree -23.9%
- Neutral -18.6%
- Disagree -10.1%
- Strongly Disagree -4.8%

Q13. Tourism provides local job opportunities

- Agree -50.2%
- Strongly Agree -30.3%
- Neutral -12.3%
- Disagree -5.5%
- Strongly Disagree -1.7%

Section E – Environmental Concern

Q14. How concerned are you about the environmental impact of tourism on Overstrand?

- Moderately concerned -34.1%
- Very concerned -21.3%
- Slightly concerned -19.6%
- Not at all concerned -14.6%
- Extremely concerned -10.4%

Q15. Rate your level of concern about the following environmental issues related to tourism:

Disturbance to whales and marine wildlife

- Concerned -29.8%
- Neutral -23.5%
- Slightly concerned -17.7%
- Extremely concerned -14.5%
- Not concerned -14.5%

Litter and waste in public spaces

- Concerned -36.6%
- Extremely concerned -35.9%
- Slightly concerned -13.7%
- Neutral -9.3%
- Not concerned -4.6%

Strain on water supply and sewage infrastructure

- Extremely concerned -40.8%
- Concerned -36.9%
- Neutral -10.1%
- Slightly concerned -9.2%
- Not concerned -2.9%

Damage to the Fernkloof and other Nature Reserves

- Concerned -34.3%
- Neutral -27.5%
- Extremely concerned -17.9%
- Slightly concerned -10.8%
- Not concerned -9.5%

Light and noise pollution in natural areas

- Concerned -30.3%
- Neutral -30.1%
- Extremely concerned -18.6%
- Slightly concerned -11.1%
- Not concerned -10.0%

Loss of natural fynbos habitat to development

- Extremely concerned -33.6%
- Concerned -31.2%
- Neutral -15.9%
- Slightly concerned -11.3%
- Not concerned -8.0%

Quality of the beaches

- Concerned -34.6%
- Neutral -24.8%
- Extremely concerned -16.8%
- Not concerned -12.0%
- Slightly concerned -11.9%

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Section F – Satisfaction with Local Services

Q16. How satisfied are you with the following local services and how well they cope with tourism pressure?

Roads and traffic management

- Satisfied -35.2%
- Somewhat dissatisfied -29.3%
- Neutral -17.2%
- Very dissatisfied -11.2%
- Very satisfied -7.0%

Public cleanliness

- Satisfied -39.1%
- Somewhat dissatisfied -25.7%
- Neutral -21.8%
- Very satisfied -7.1%
- Very dissatisfied -6.3%

Weekly waste removal

- Satisfied -50.8%
- Very satisfied -29.0%
- Neutral -12.6%
- Somewhat dissatisfied -5.4%
- Very dissatisfied -2.2%

Public transport and pedestrian infrastructure

- Neutral -35.0%
- Somewhat dissatisfied -28.9%
- Satisfied -18.8%
- Very dissatisfied -14.3%
- Very satisfied -3.0%

Municipal parks and public open spaces

- Neutral -33.9%
- Satisfied -30.8%
- Somewhat dissatisfied -22.6%
- Very dissatisfied -7.4%
- Very satisfied -5.4%

Public ablution facilities

- Neutral -34.9%
- Somewhat dissatisfied -28.6%
- Satisfied -20.4%
- Very dissatisfied -12.3%
- Very satisfied -3.8%

Public safety and policing

- Satisfied -28.6%
- Neutral -28.1%
- Somewhat dissatisfied -27.0%
- Very dissatisfied -9.8%

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- Very satisfied -6.5%

Section G – Equity, Growth & Future Direction
Q17. Do you feel that the broader community benefits equitably from tourism in Overstrand?

- Somewhat equitably -30.8%
- Not equitably enough -24.3%
- Yes, very equitably -19.6%
- I don't know enough to say -17.9%
- Very inequitably -7.4%

Q18. Which of the following would most improve the relationship between tourism and local residents? (Select up to 2)
(Multiple selections allowed; percentages sum to more than 100%.)

- Develop more tourism in the off-season to reduce peak pressure -54.3%
- Improve public transport to reduce private vehicle congestion -51.5%
- Improve resident input into tourism planning decisions -46.3%
- Better distribute tourism-generated income to local communities -25.9%
- Enforce stricter rules on short-term rental properties -21.9%

Q19. In your view, should Overstrand actively seek to grow visitor numbers over the next 5 years?

- Yes - grow carefully, with strong management measures -42.1%
- Keep at current levels - manage better, not bigger -31.1%
- Yes - grow significantly, the economic benefits are worth it -18.5%
- Reduce visitor numbers - quality of life is suffering -6.4%
- Unsure -1.9%

Q20. What kind of tourism do you believe Overstrand should focus on developing? (Select up to 3)
(Multiple selections allowed; percentages sum to more than 100%.)

- Food, wine, and culinary tourism -54.8%
- Family and affordable tourism -50.2%
- Whale watching and marine eco-tourism -49.9%
- Hiking and nature-based tourism -42.1%
- Adventure and sports (hiking, golf, cycling, paragliding) -33.7%
- Cultural and heritage tourism -15.6%
- Conference and business tourism -14.0%
- Luxury and high-end tourism -8.7%