

## Visitor Profiles: Wine & Cuisine 2017

### Introduction

The Western Cape Wine Routes are one of the most scenic destinations in the world and wine tourism is one of South Africa's fastest growing industries. South Africa also boasts the largest number of Fairtrade certified wineries in the world and the largest single Fairtrade accredited project was recently launched at the Du Toitskloof Cellar in Rawsonville. Most of South Africa's vineyards are found in the Western Cape, some of which are an easy drive from Cape Town. There are currently some 560 wineries and 4,400 primary producers of vineyards in the Western Cape, divided by the Wine of Origin Scheme into 4 main regions: The Breede River Valley, The Little Karoo, Coastal and Olifants River.

The South African tourism sector has undergone a whole new momentum. Wine tasting, winemaking tours, excellent cuisine and magnificent scenery collectively create an irresistible attraction for international and local travellers alike. Wine is most often consumed with food, and the perceived effects they have on each other and on the palate have given birth to the art of food and wine pairing. In the Western Cape, the Franschhoek Wine Valley in particular is also renowned for its food, and is acknowledged as the 'gourmet capital of South Africa'. In addition, Franschhoek also offers a food and wine route for foodies and wine enthusiasts. The route includes the prominent restaurants and wine estates that fall into the Franschhoek valley.

This report provides an overview of visitors who have selected either 'wine tasting' or 'cuisine' as their travel activity during the course of their stay in the Western Cape. The study was specifically conducted for VinPro, a non-profit company which represents around 2,500 South African wine producers, cellars and industry stakeholders. The objective of the study is to obtain a thorough understanding of the relationship between the wine and cuisine (food) traveller to the Western Cape, as well as the key trends and travel behaviour of these niche markets.

### 1. Sample Size

#### 1.1 Number of Surveys by Travel Activity: 2016-2017 (2-YEAR PERIOD)

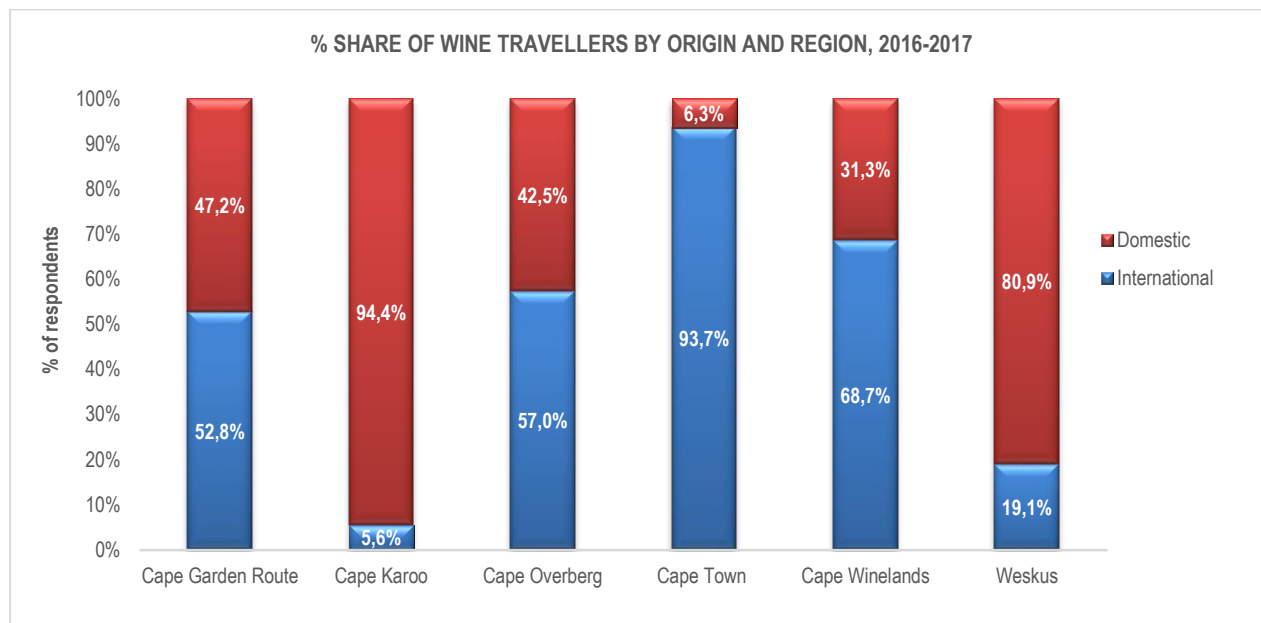
Visitor surveys reviewed by travel activity and region over the last two years (2016-2017) indicated an equally strong sample of respondents for wine tasting and cuisine in the Cape Winelands region. The Cape Overberg followed with the second largest share of respondents for both wine tasting and cuisine.

The Weskus held the 3<sup>rd</sup> largest share of respondents for cuisine, with over 1,800 respondents who specifically enjoyed the local cuisine in the region. The popularity of the Weskus local cuisine comes as no surprise. Food is one of the few ways in which you can truly internalize a new destination, and the Weskus has proven to hold its own distinct taste and flavour. Locals are transported back to childhood at the taste of a fresh snoek, or freshly baked mosbeskuit, while tourists can relate to the destination by familiarizing themselves with the diverse tastes of the region.

Region	Total Surveys	Respondents-Wine Tasting	Respondents-Cuisine
Cape Garden Route	7 899	572	1 356
Cape Karoo	2 045	18	82
Cape Overberg	24 594	1 378	2 033
Cape Town	3 472	537	1 097
Cape Winelands	12 132	3 728	3 046
Weskus	12 404	612	1 859
<b>Grand Total</b>	<b>62 546</b>	<b>6 845</b>	<b>9 473</b>

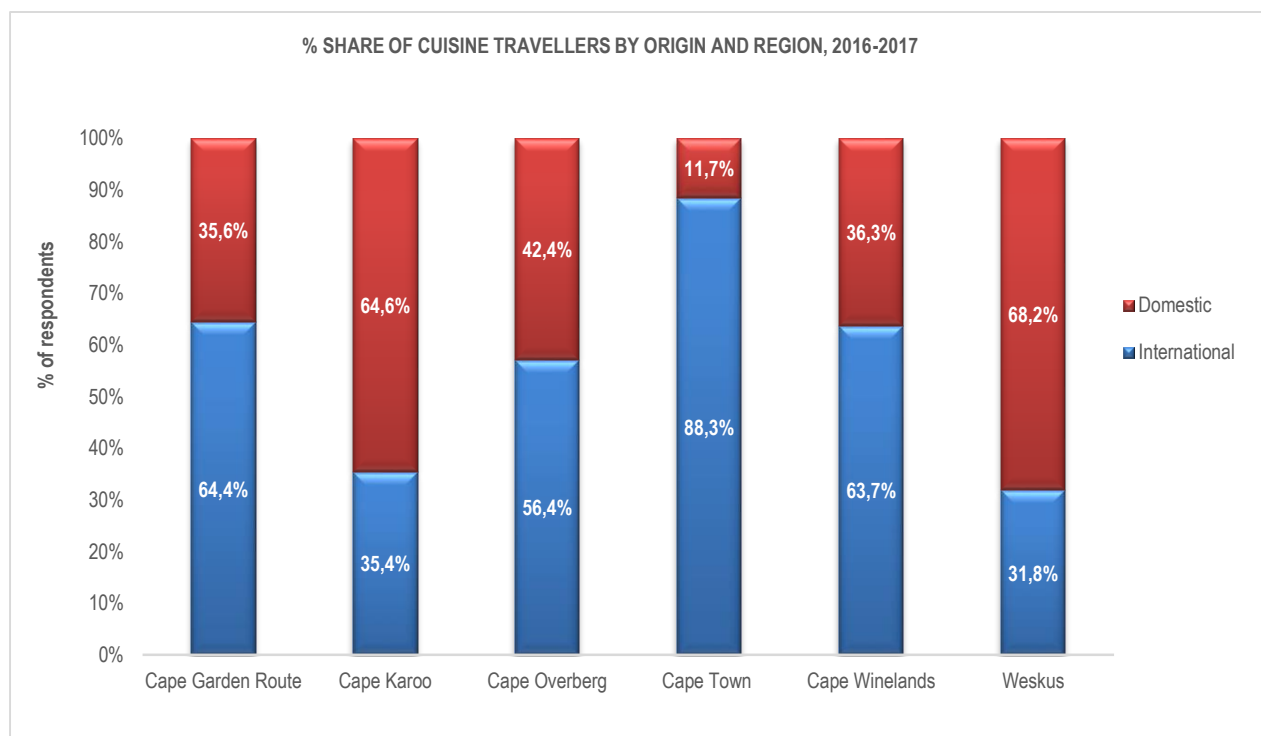
## 1.2 Wine Tasting: Share of Respondents by Origin and Region

The Cape Town (93.7%), Cape Winelands (68.7%), Cape Overberg (57.0%) and Cape Garden Route regions recorded a larger share international respondents who indicated wine tasting as one of their top three activities undertaken. The domestic market who enjoyed wine tasting dominated in the Cape Karoo (94.4%) and Weskus (80.9%) regions. The figure below confirms that apart from the Cape Winelands, wine tasting is equally prominent in the neighbouring regions of the Western Cape.



## 1.3 Cuisine: Share of Respondents by Origin and Region

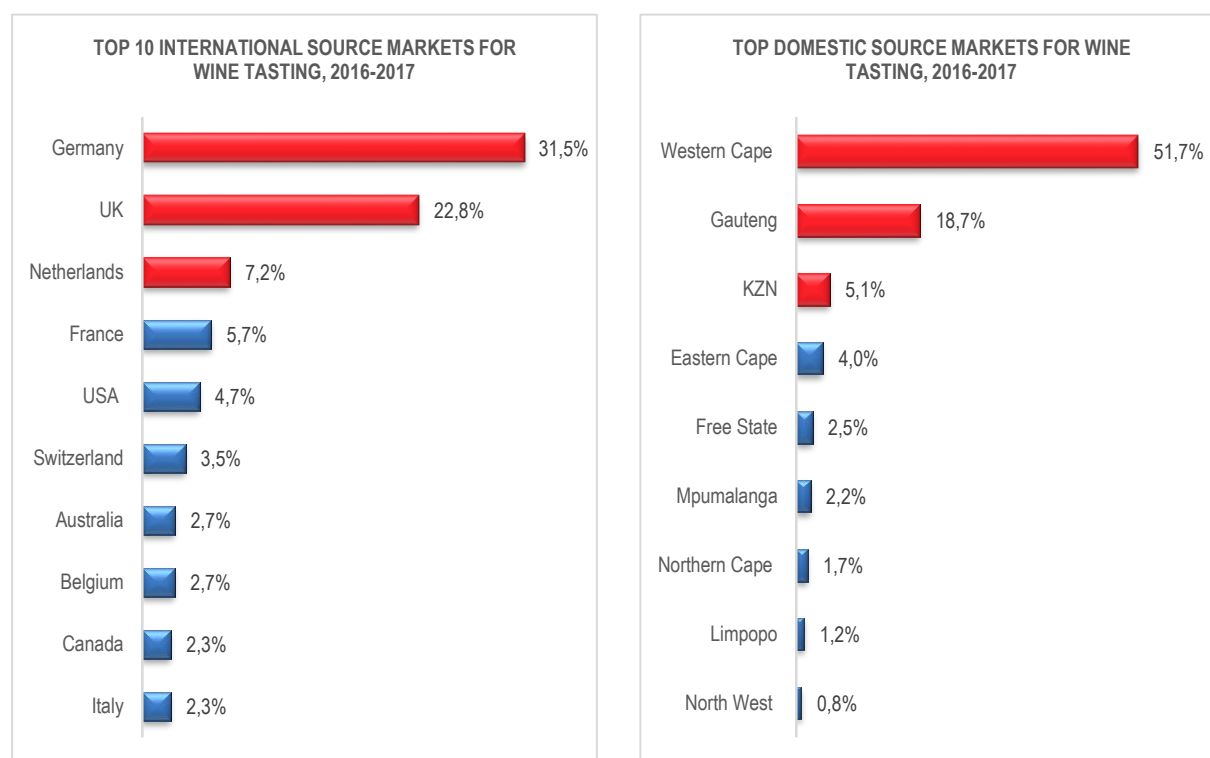
When taking a closer look at the respondents who selected 'cuisine' as a travel activity, the trend indicated below demonstrates a strong interest from the international market across all regions, with the exception of the Cape Karoo and Weskus.



## 2. Visitor Profile: 'Wine Tasting' as a Travel Activity

### 2.1 Origin of the Wine Traveller

The top 3 International markets which provides the largest share of wine travellers for the Western Cape includes Germany (31.5%), United Kingdom (22.8%) and the Netherlands (7.2%). The Western Cape, Gauteng and KZN ranked as the top three domestic provinces who participated in wine tasting. With consistent support and contributions from industry partners, it is anticipated to grow and expand these markets to attract an even greater share of travellers from the international and domestic wine market.



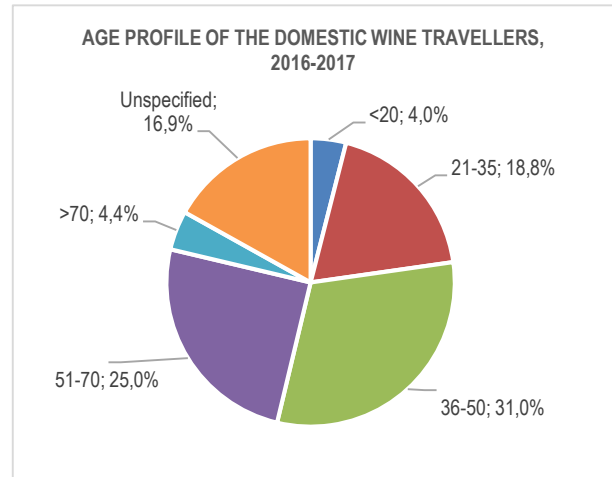
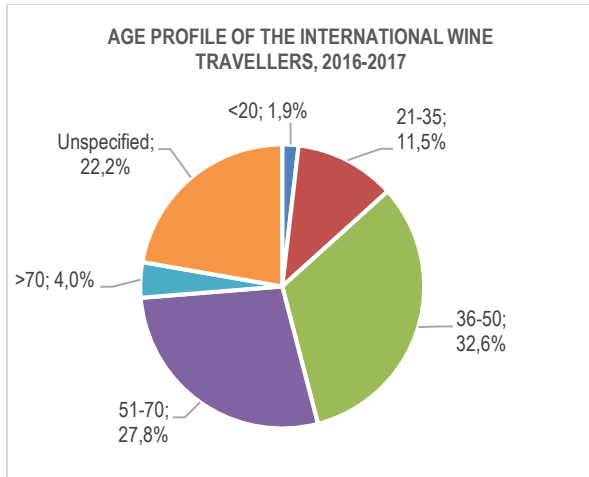
### 2.2 Main Purpose of Visit

The international wine tourists are predominantly holiday visitors (97.7%). The domestic market portrayed an equally strong share of holiday visitors (90.9%), followed by a marginal share who also travelled for business (2.0%) and to visit family and friends (3.3%).

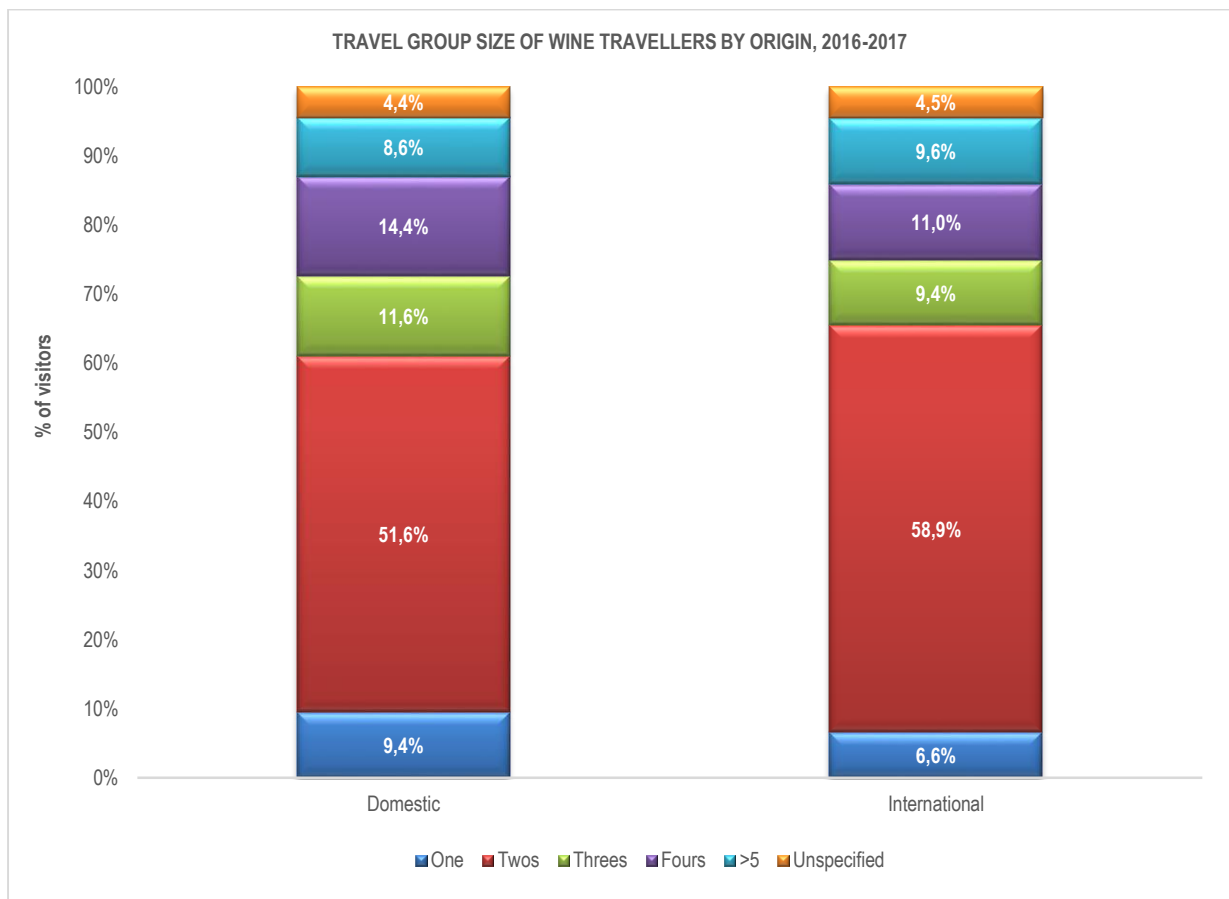
Purpose of visit	International	Domestic
Holiday/Leisure	97,7%	90,9%
Business	0,9%	2,0%
VFR	0,4%	3,3%
Honeymoon/Weddings	0,3%	1,9%
Events	0,3%	1,3%

### 2.3 Age Profile

The age profile of both the international and domestic travellers highlights a mature market between the age of 36-50 and 51-70 years, followed by the age group 21-35 years across both markets. From the travel group size depicted in the graph below, it is evident that travellers who enjoyed wine tasting is less likely to travel by themselves. The largest share of travellers across all markets predominantly travelled in pairs or as couples, and the second largest share of travellers for each market travelled in groups of four or as families.

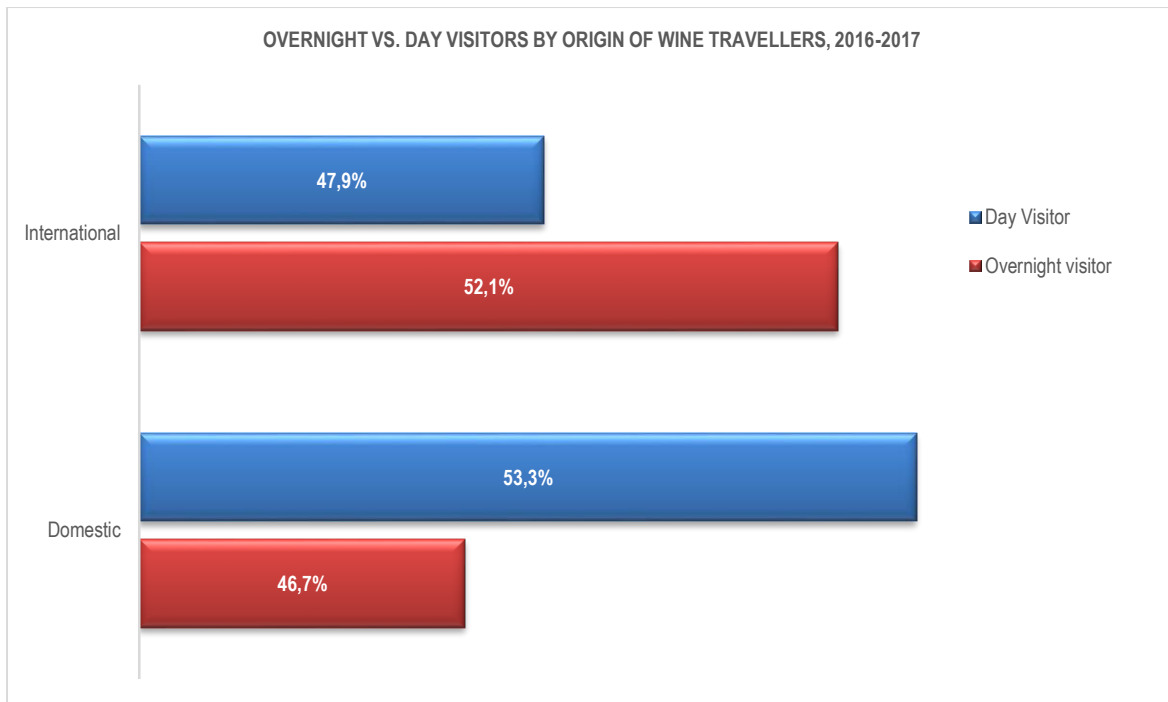


## 2.4 Travel Group Size



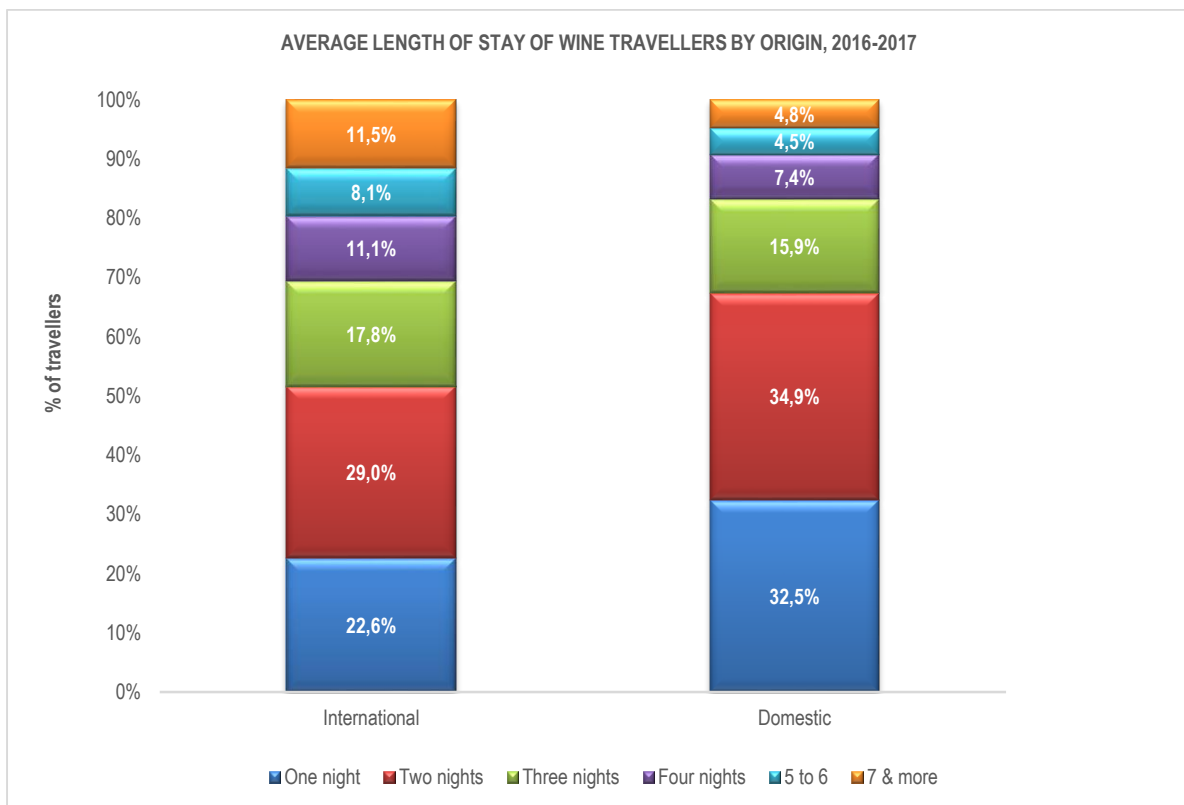
## 2.5 Overnight vs. Day Visitors

Over 50% of the international travellers who enjoyed wine tasting stayed overnight in the respective regions, while the domestic market comprised largely of day visitors. It is important to note that 51.7% of the domestic respondents originates from the Western Cape which translates into more frequent day trips due to close proximity between regions.



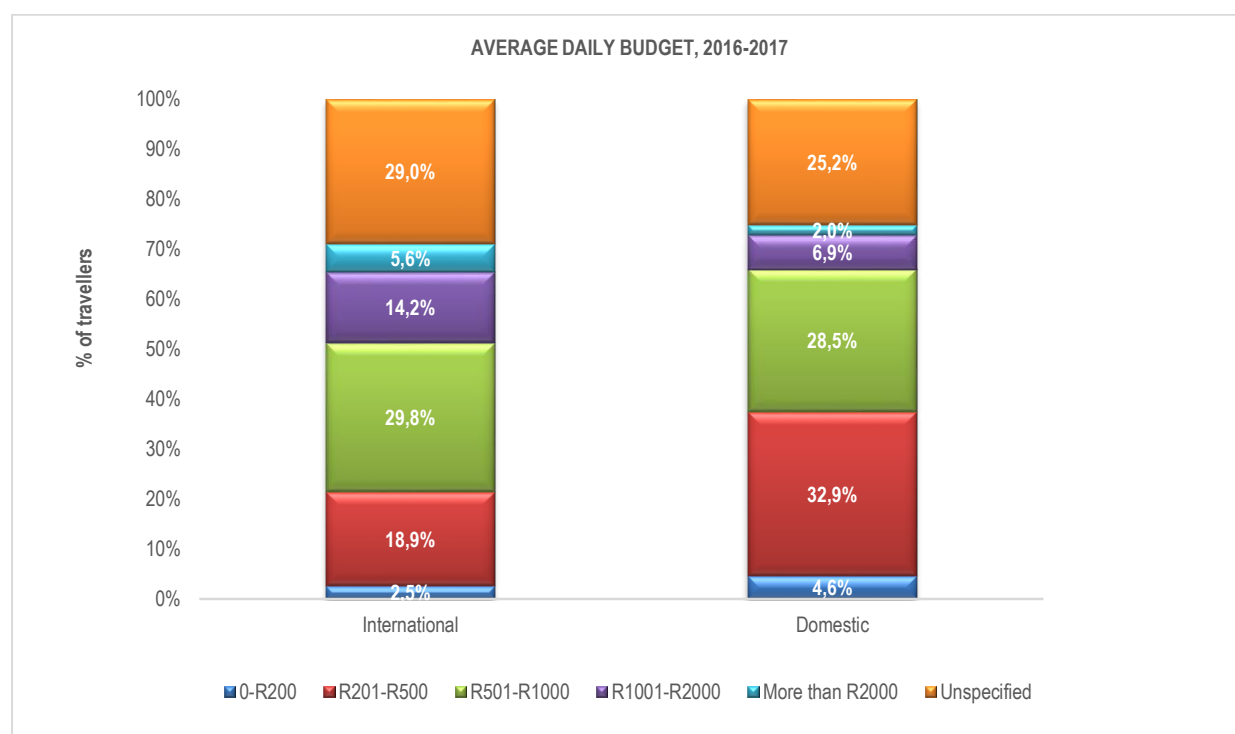
## 2.6 Average Length of Stay

From the trend seen below, international and domestic visitors who enjoyed wine tasting mainly stayed for an average of one, two or three nights in the respective towns. These travellers tend to also pair their wine experience with the local cuisine and cultural activities, resulting in longer stays. Extended trips of over a week was also popular amongst the international travellers, with over 11% of respondents who indicated stays of seven days and more.



## 2.7 Average Daily Spend

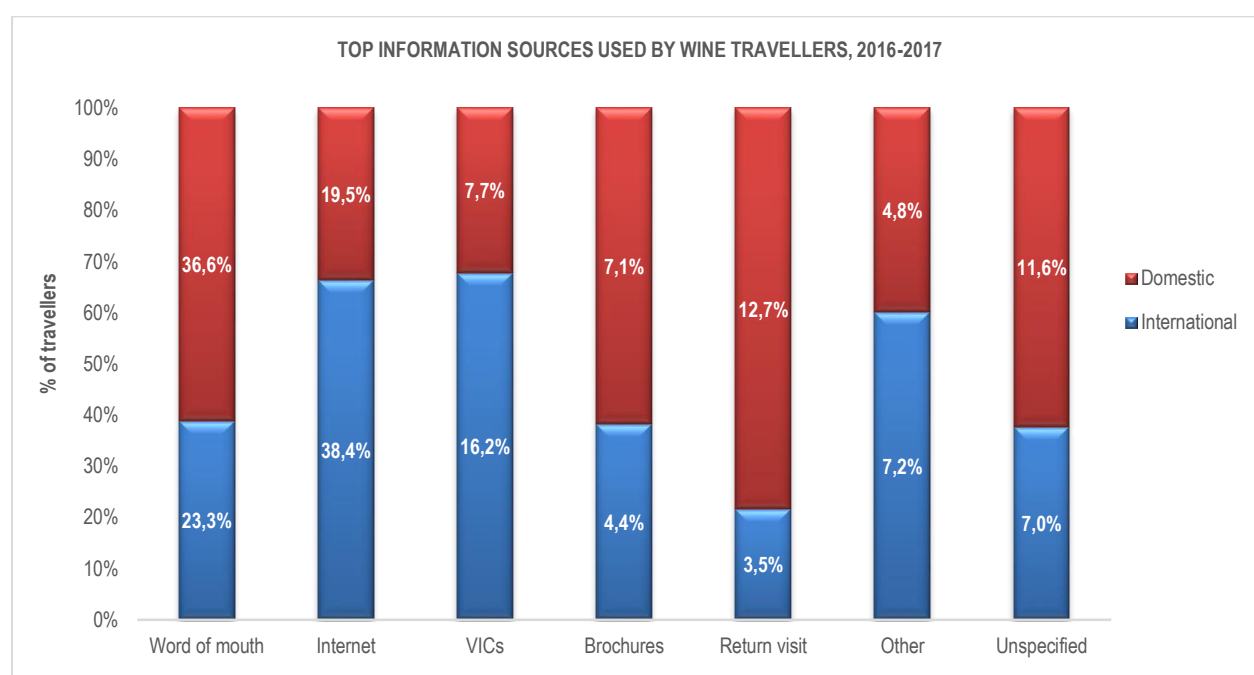
The international market who enjoyed wine tasting spend on average R501-R1000 (29.8%) and R201-R500 (18.9%) per day. The largest share of the domestic market spent an average of R201-R500 (32.9%) per day. This only reflects the daily expenditure excluding accommodation costs, which underlines the strong economic contribution of these markets.



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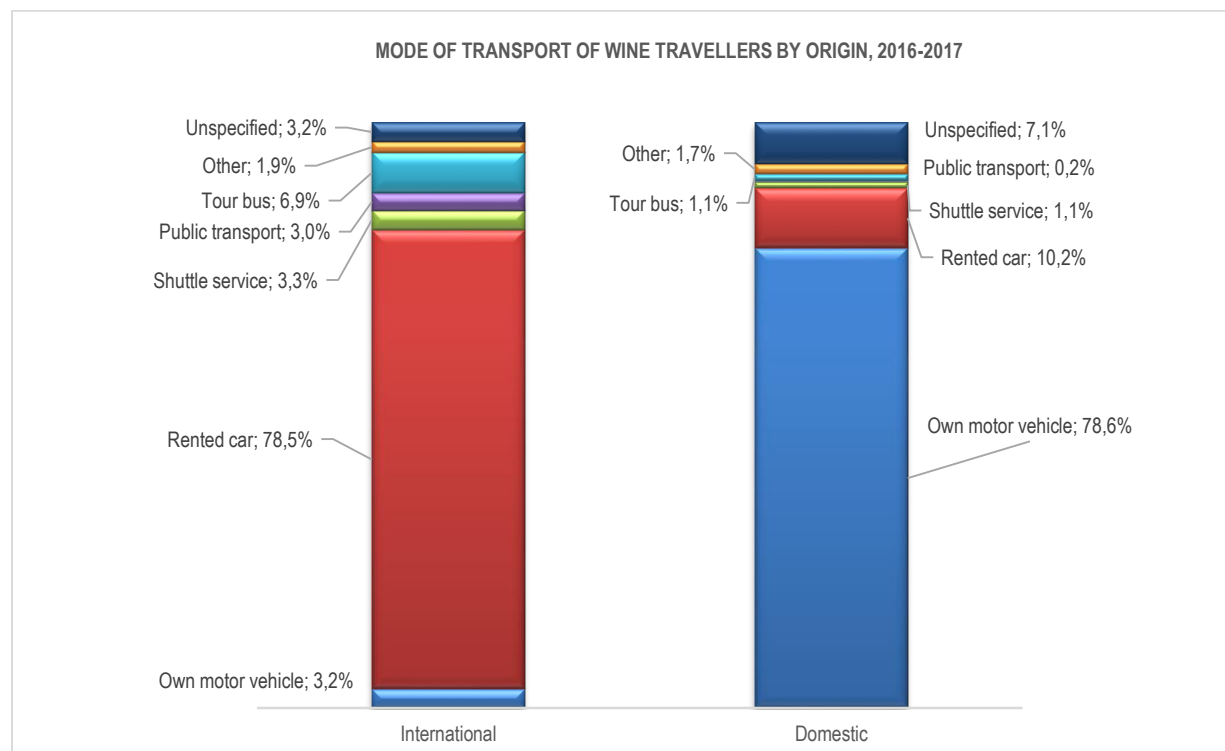
## 2.8 Top Information Sources

When observing the top information sources used during the period, the internet (31.3%) and word of mouth (28.3%) accounted for almost 60% of responses and ranked as the top two sources used by both international and domestic travellers. Visitor Information Centres (VICs) reflected a higher share amongst the international travellers, while the domestic market portrayed a stronger share in return visits. This trend can largely be aligned to the strong share of travellers from the Western Cape market, with close proximity resulting in ease of travel.



## 2.9 Mode of Transport

Rented vehicles (78.5%) by far ranked as the most popular mode of transport amongst the international travellers, while the domestic market preferred to use their own vehicles (78.6%). The international market also made use of tour buses (6.9%), a trend which can be linked to the prominent wine excursions which most of the tour bus companies have on offer.



## 2.10 Top Activities Undertaken by International Source Market and Region

The United Kingdom and Germany dominated as the top two international source markets for both wine and cuisine across the respective regions, followed by Netherlands, France and the United States.

TOP ACTIVITIES UNDERTAKEN BY INTERNATIONAL SOURCE MARKET AND REGION, 2016-2017						
Region/Source Market	Travel Activity	Germany	United Kingdom	Netherlands	France	United States
Cape Town	Wine tasting	33.6%	32.4%	8.1%	13.0%	13.0%
	Cuisine	36.6%	32.3%	8.0%	8.0%	15.1%
Cape Winelands	Wine tasting	46.4%	28.0%	11.3%	7.9%	6.4%
	Cuisine	44.9%	32.9%	12.6%	5.2%	4.4%
Cape Overberg	Wine tasting	39.9%	42.8%	6.9%	6.8%	3.7%
	Cuisine	34.1%	48.4%	7.7%	5.0%	4.8%
Cape Garden Route & Klein Karoo	Wine tasting	45.5%	25.4%	10.6%	6.9%	11.6%
	Cuisine	33.7%	32.6%	16.9%	10.5%	6.3%
Weskus	Wine tasting	44.1%	40.5%	8.3%	4.8%	2.4%
	Cuisine	35.9%	44.0%	11.6%	4.7%	3.8%
Cape Karoo	Wine tasting	-				
	Cuisine	38.1%	4.8%	28.6%	19.1%	9.5%

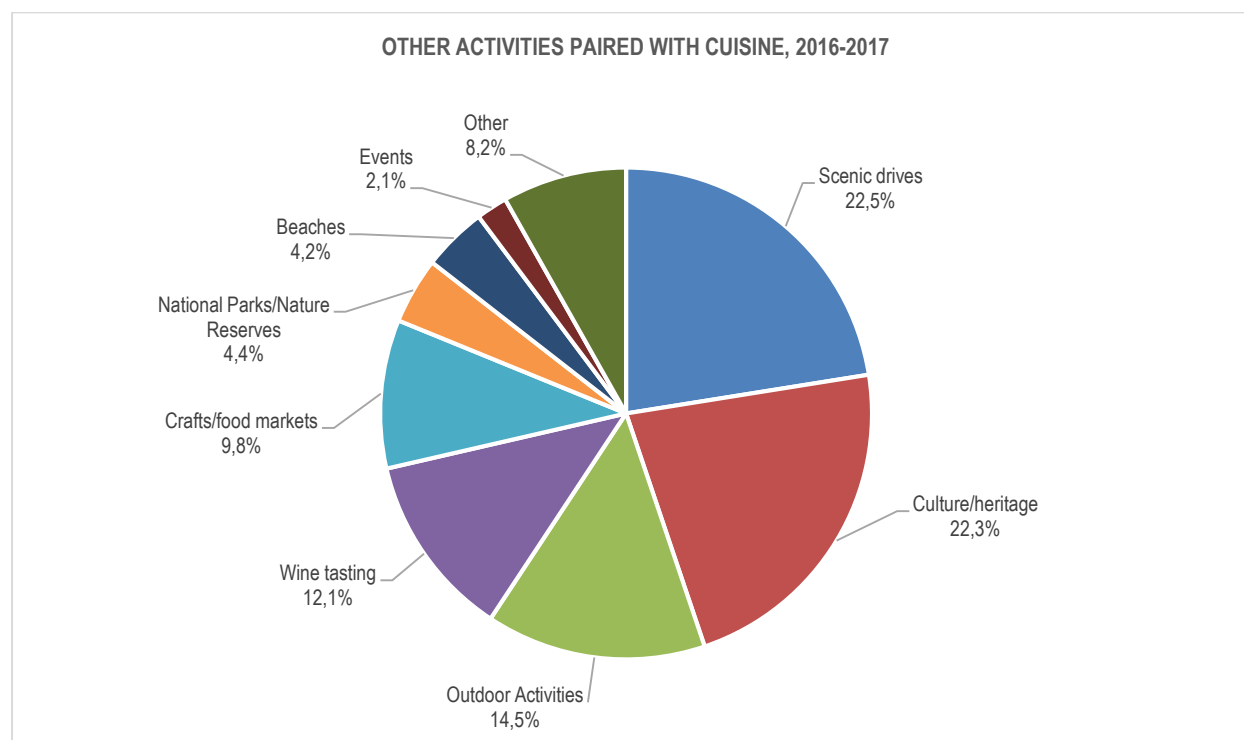
## 2.11 Top Activities Undertaken by Domestic Source Market and Region

By region, the Western Cape and Gauteng ranked as the top two domestic markets who equally enjoyed wine and cuisine respectively.

TOP ACTIVITIES UNDERTAKEN BY DOMESTIC SOURCE PROVINCE AND REGION, 2016-2017					
Region/Source Province	Travel Activity	Western Cape	Gauteng	Eastern Cape	KwaZulu-Natal
Cape Town	Wine tasting	25.0%	55.0%	-	20.0%
	Cuisine	14.1%	62.0%	5.6%	18.3%
Cape Winelands	Wine tasting	69.3%	22.0%	3.1%	5.5%
	Cuisine	68.7%	23.3%	2.8%	5.2%
Cape Overberg	Wine tasting	72.6%	15.8%	4.4%	7.1%
	Cuisine	70.3%	14.0%	9.5%	6.2%
Cape Garden Route & Klein Karoo	Wine tasting	45.7%	35.0%	13.7%	5.6%
	Cuisine	38.7%	41.7%	12.0%	7.6%
Weskus	Wine tasting	57.7%	29.1%	6.2%	6.9%
	Cuisine	64.3%	24.7%	4.9%	6.1%
Cape Karoo	Wine tasting	80.0%	20.0%	-	-
	Cuisine	44.2%	37.2%	9.3%	9.3%

## 2.12 Additional Activities Paired with Cuisine

- **12.1%** of respondents who selected Cuisine also enjoyed Wine Tasting in the Western Cape.
- Travellers who enjoyed the local cuisine also enjoyed scenic drives (22.5%), culture/heritage (22.3%) and outdoor activities (14.5%).





## 2.13 TOP 5 Activities Paired with Cuisine by Region

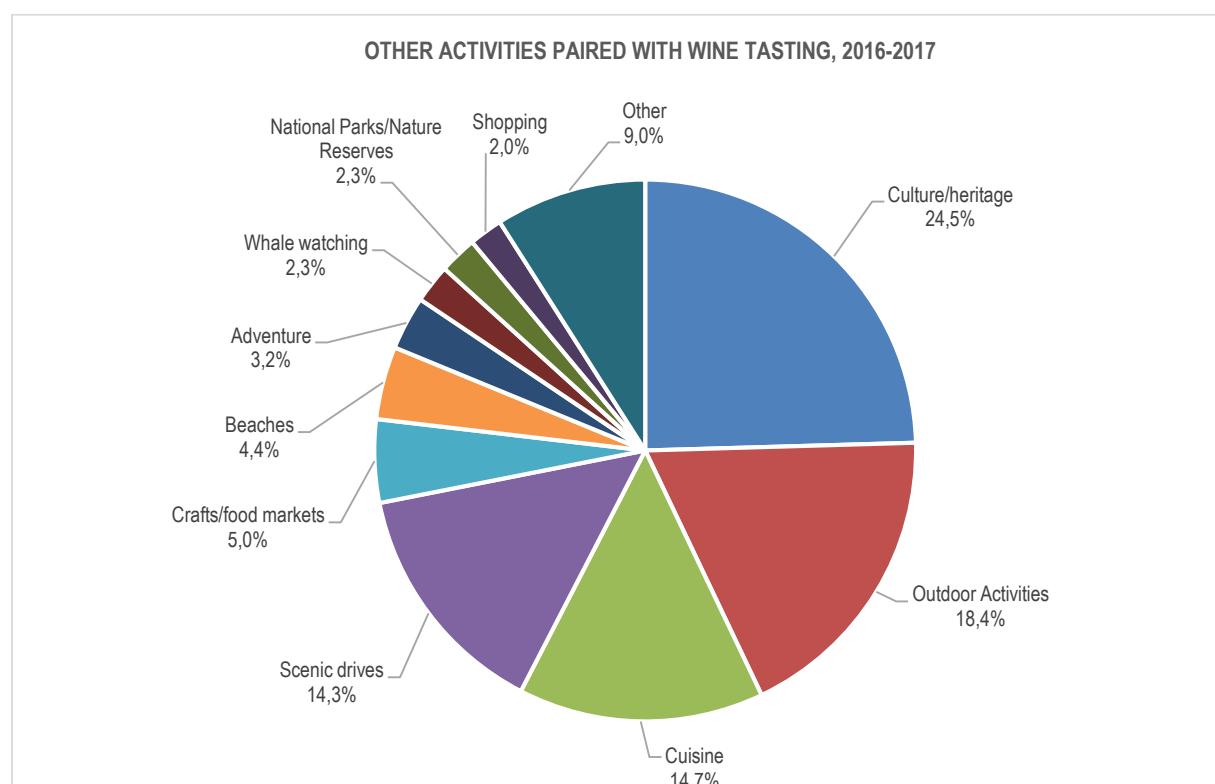
When observing the TOP 5 additional activities paired with cuisine for each region below, wine tasting ranked within the TOP 5 activities for the Cape Winelands (2<sup>nd</sup> position) and Cape Overberg (5<sup>th</sup> position) regions, while ranking in 11<sup>th</sup> position for the Cape Garden Route and 6<sup>th</sup> position for the Weskus.

Trends observed below confirms the existing development in the Cape Winelands, where wine and cuisine have already become a strong combination for the local tourism industry. The Franschhoek Food and Wine Route is a perfect example of the strong economic value of pairing these key travel activities. However, it is interesting to also note the popularity and growing interest across the surrounding regions.

Cape Town: Cuisine		Cape Winelands: Cuisine		Cape Overberg: Cuisine		Cape Garden Route: Cuisine		Weskus: Cuisine	
Additional Activities	% of respondents	Additional Activities	% of respondents	Additional Activities	% of respondents	Additional Activities	% of respondents	Additional Activities	% of respondents
Culture/heritage	43,1%	Culture/heritage	26,2%	Scenic drives	28,9%	Outdoor Activities	22,4%	Scenic drives	28,2%
Outdoor Activities	29,1%	<b>Wine tasting</b>	<b>22,3%</b>	Outdoor Activities	15,7%	Scenic drives	18,7%	Culture/heritage	19,1%
Beaches	7,9%	Scenic drives	17,0%	Culture/heritage	12,9%	Culture/heritage	17,0%	Crafts/food markets	14,4%
National Parks/Nature Reserves	7,3%	Outdoor Activities	16,7%	Crafts/food markets	10,6%	Crafts/food markets	15,5%	Outdoor Activities	7,2%
Adventure	5,8%	Crafts/food markets	8,7%	<b>Wine tasting</b>	<b>8,0%</b>	Beaches	7,1%	Beaches	6,6%
No sample for Wine Tasting		N/A		N/A		Wine: Ranking #11th 1,0%		Wine: Ranking #6th 5,5%	

## 2.14 Additional Activities Paired with Wine Tasting

- **14.7%** of respondents who selected Wine Tasting also enjoyed Cuisine in the Western Cape.
- Culture/heritage (24.5%), outdoor activities (18.4%) and scenic drives (14.3%) ranked amongst the top additional activities enjoyed by travellers who participated in wine tours.



## 2.15 TOP 5 Activities Paired with Wine Tasting by Region

From the regional trends indicated below, cuisine is definitely a popular activity travellers paired with their wine experience. Cuisine ranked within the TOP 5 activities in the Cape Winelands (2<sup>nd</sup> position), Cape Overberg (3<sup>rd</sup> position) and the Weskus (3<sup>rd</sup> position) regions. Cuisine also ranked within the TOP 10 activities paired with wine in the Cape Garden Route region (9<sup>th</sup> position).

Cape Town: Wine Tasting		Cape Winelands: Wine Tasting		Cape Overberg: Wine Tasting		Cape Garden Route: Wine Tasting		Weskus: Wine Tasting	
Additional Activities	% of respondents	Additional Activities	% of respondents	Additional Activities	% of respondents	Additional Activities	% of respondents	Additional Activities	% of respondents
Culture/heritage	42,3%	Culture/heritage	27,4%	Outdoor Activities	21,2%	Outdoor Activities	18,5%	Culture/heritage	22,1%
Outdoor Activities	39,2%	<b>Cuisine</b>	<b>24,6%</b>	Scenic drives	21,0%	Adventure	17,2%	Scenic drives	16,7%
Beaches	5,6%	Scenic drives	16,3%	<b>Cuisine</b>	<b>12,5%</b>	Scenic drives	14,0%	<b>Cuisine</b>	<b>12,4%</b>
Adventure	4,8%	Outdoor Activities	15,0%	Culture/heritage	10,8%	Beaches	9,5%	Crafts/food markets	11,8%
Shopping	2,3%	Shopping	4,4%	Beaches	6,1%	National Parks/Nature Reserves	7,7%	Events	6,3%
No sample for Cuisine		N/A		N/A		Cuisine: Ranking #9th 3,3%		N/A	

## Conclusion

As illustrated in a survey conducted by SKIFT (2016), food/cuisine tourism continues to revolve more around the rise of spirits, craft beers, and other alcoholic drink categories. Beverage trails, first made popular by destinations such as Kentucky and its Bourbon Trail, are surfacing in other parts of the country. Beer culture in particular is booming in America. Craft beer, especially, has grown into a massive consumer market. Other cities are creating similar product experiences around coffee, spirits, liqueurs, etc., to rebrand their identities for foodies. Based on these shifts, Destination Marketing Organisations (DMOs) are responding by developing more segmented and sophisticated digital content that speaks directly to a wider range of culinary niches and consumer tastes.

The biggest shift in the evolution of the food tourism strategy today is segmentation. What appeals to one “foodie” won’t to many others, therefore it is vital for DMOs to outline the different segments within their unique culinary travel experiences. A sample of those might include: gourmet/fine dining; fast casual and gastropub; farmers’ markets and food festivals; organic and vegan; and wine, beer and spirits, etc.

As food is an integral part of the cultural experience, some believed that food tourism plays an important role in promoting destination marketing. For the millennials, the internet is the main source of information as well as inspiration. Hotels and tour agencies can therefore develop relevant content as part of their destination-marketing strategy. For example, Australia developed their own Instagram page concentrating on all things local and highlighting tourist attractions and culinary hotspots. Hence tourists are able to plan thoroughly, which places to visit and what food or wine to pair.

The evolution of pairing food with wine has also emerged as an increasingly popular activity enjoyed by travellers to the Western Cape. From the trends indicated in this study, findings confirmed that the Western Cape’s food and wine market is portraying a growing interest with more and more travellers pairing their wine experiences with the local cuisine and culture of the Western Cape. While the Cape Winelands maintains its standing one of the Western Cape’s strongest wine producing areas, regions such as the Cape Overberg, Cape Garden Route and the Weskus reflected an equally strong share of travellers who enjoyed pairing their wine and cuisine experiences.

Those who have invested in the tourism offering of wine estates are reaping the rewards and know that the real prospect for economic growth in the sector lies within hospitality and not in the wine itself. Destination farms such as Delaire Graff Estate is a great example of this success, once the farm offering has been repositioned as a wine, food and art experience. Johann Laubser, GM of Delaire Graff Estate says: “Delaire Graff Estate has invested millions in wine tourism in the last few years. Wine industry players underestimate the impact of wine tourism on a wine business, the opportunities and potential for growth is huge. Thanks to our wine tourism offering, we now even experienced a busy winter season, whilst running at full capacity in high season”.

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