Cape Winelands Regional Trends

WESGRO
cape town & western cape
research

2017

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Contents

1. Methodology

- This report provides an overview of the tourism trends and patterns in the Cape Winelands. The findings will illustrate key visitor trends obtained from the regional visitor tracking survey.

- *Responses to the regional visitor tracking surveys are used as a proxy to indicate the key trends within the Western Cape and the various regions. It is important to note that absolute figures cannot be determined from these surveys, as the survey responses are a sample of the tourists into the respective tourism offices across the Western Cape, and would thus represent a sample of the visitors. Therefore, where statistically relevant absolute numbers may be given, however, a share is provided to indicate the trend. This is based on international best practice in the use of surveys within the tourism industry for determining key trends.*

- ***Definition:*** *Tourist: refers to any visitor travelling to a place other than that of his/her own environment for more than one night, but less than 12 months and for whom the main purpose of the trip is other than the exercise of an activity remunerated for from within the place visited.*

2. Participation and sample size

In 2017, a total of **6,176** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Cape Winelands. The participating Tourism Offices were:

- Paarl (2,428);
- Tulbagh (1,195);
- Wellington (1,060);
- Stellenbosch (792);
- Worcester (444);
- Robertson (181);
- Ceres (47) and
- Montagu (29).

3. Executive Summary

- Wine tourism is one of South Africa's fastest growing industries. One would thus be remiss if one did not include the many wine routes of the Cape, some of which are an easy drive from Cape Town, such as the Constantia, Durbanville, Darling and Walker Bay wine routes.

- Visitor surveys conducted in 2017 reflected a fairly equal distribution of overseas (53.4%) and domestic (46.6%) visitors. Germany, the United Kingdom and Netherlands ranked as the top three markets to the region. Provincially, these three markets rank as the Western Cape's strongest contributors to tourism volume from Europe.

- The Western Cape market (43.8%) ranked as the top domestic province to the region. According to the Statistics South Africa 2016 Domestic Tourism Survey, 99.2% of day travellers and 69.9% of overnight travellers to the Western Cape originated from the province. Despite economic challenges, these trends confirm that the local Western Cape market continues to travel and seek leisure experiences within their own province. The close proximity between Cape Town and the Cape Winelands also provides ease of travel, with less driving/travelling time and more time to explore the tourism offerings.

- The most prominent age profile of visitors to the Cape Winelands were between 36-50 (40.6%) and 51-70 (31.9%) years. Over 90% of respondents indicated holiday as their top motivation for travelling to the Cape Winelands. Business travel (5.1%) followed as the second most popular reason for visiting the region.

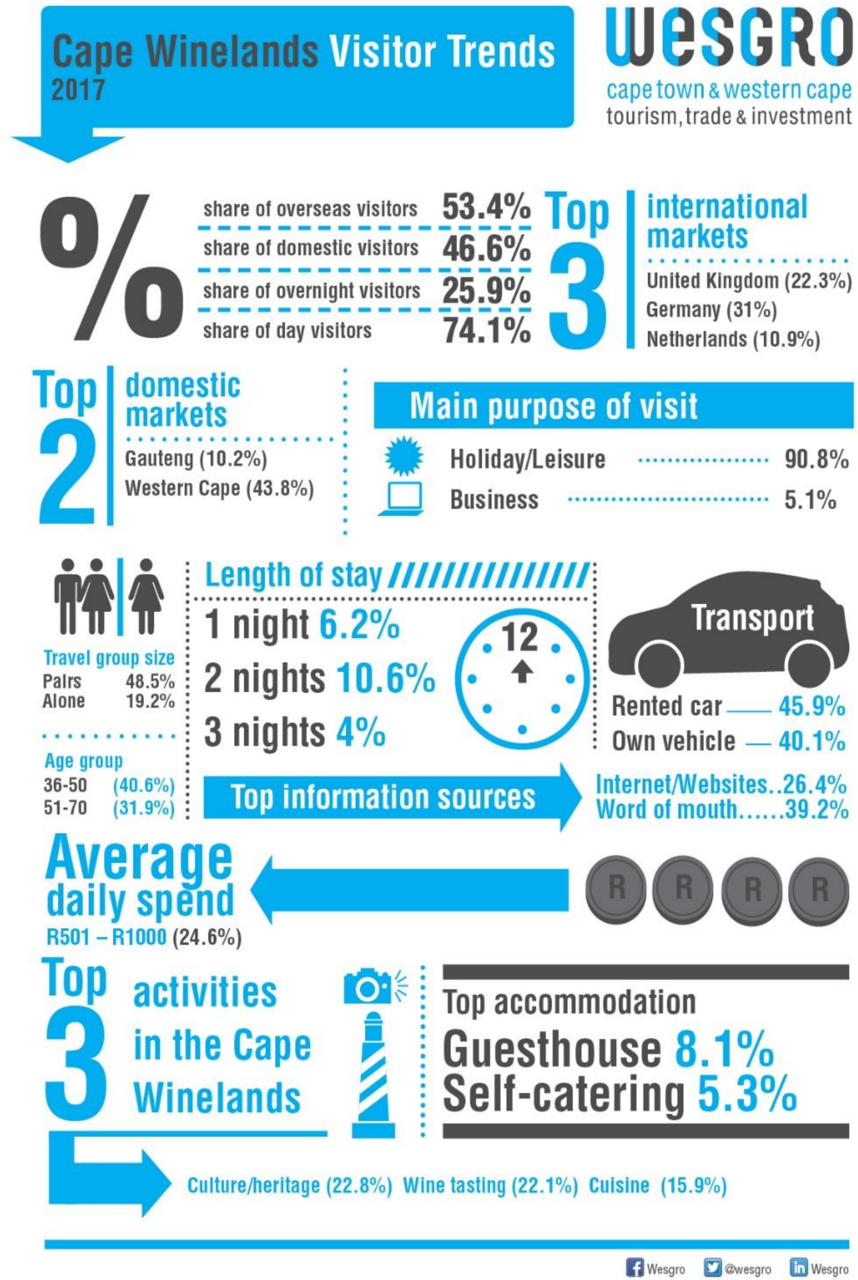
- The largest proportion of visitors travelled in pairs (48.5%) and 19.2% of visitors to the region were solo travellers. Top modes of transport used by visitors to the region included rented cars (45.9%) and own motor vehicles (40.1%).

- 74.1% indicated day visits to the region, while a share of 25.9% were overnight visitors. Of those who stayed overnight, the largest share stayed for an average of two nights (10.6%) and 1 night (6.2%).

- Guesthouses and self-catering ranked as the top accommodation choices amongst travellers. These visitors spent on average R501-R1000 (24.6%) per day in the Cape Winelands.

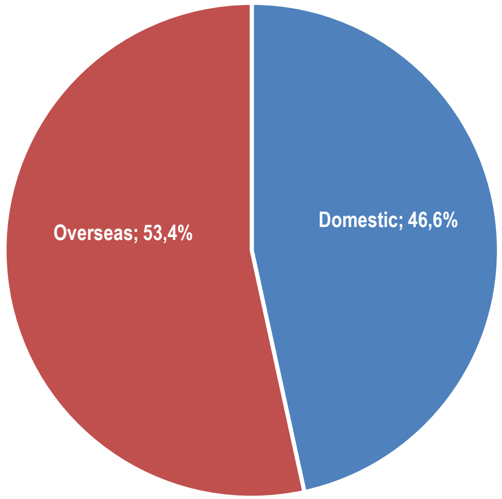
- Word of mouth (39.2%) and the internet (26.4%) ranked as the top information sources used by visitors to obtain information on the region.

- Culture/heritage, wine tasting, cuisine, scenic drives and outdoor activities ranked as the top five activities visitors enjoyed during their stay. Trends further indicated that wine tasting, winemaking tours, excellent cuisine and magnificent scenery collectively create an irresistible attraction for international and local travellers alike.



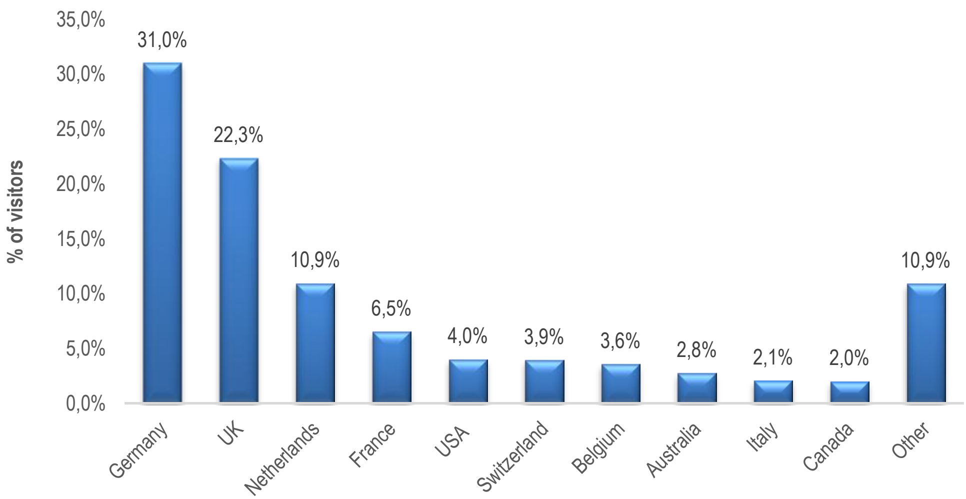
4. Cape Winelands Visitor Trends & Patterns

4.1 Origin of Visitors

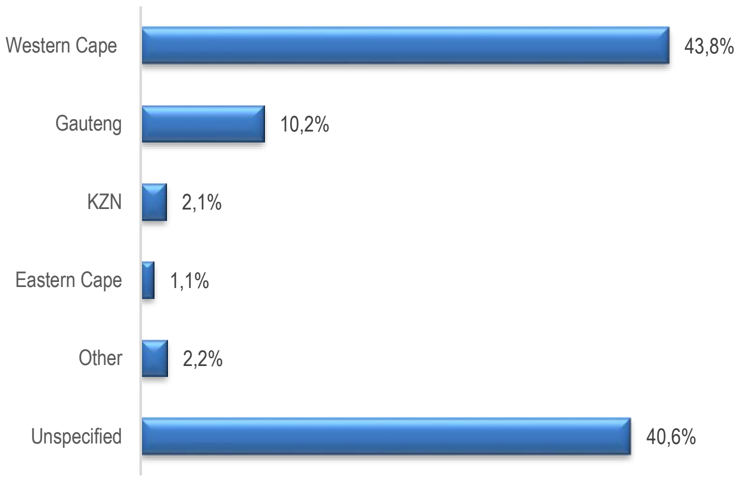


- In 2017, the Cape Winelands reflected a fairly even split between the overseas (53.4%) and domestic (46.6%). Germany, the United Kingdom and Netherlands ranked as the top three markets to the region.
- The Western Cape (43.8%) emerged as the leading domestic market for the Cape Winelands. The region is a very popular amongst the local Western Cape, largely due to the close proximity between Cape Town and the Cape Winelands.

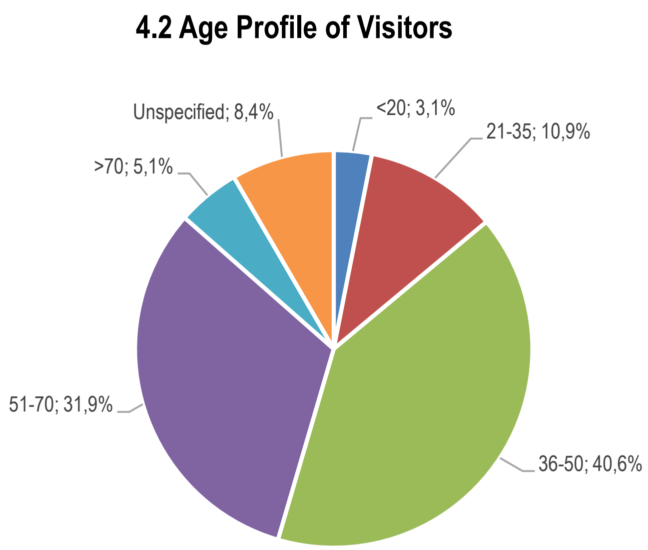
TOP 10 INTERNATIONAL MARKETS TO THE CAPE WINELANDS, 2017



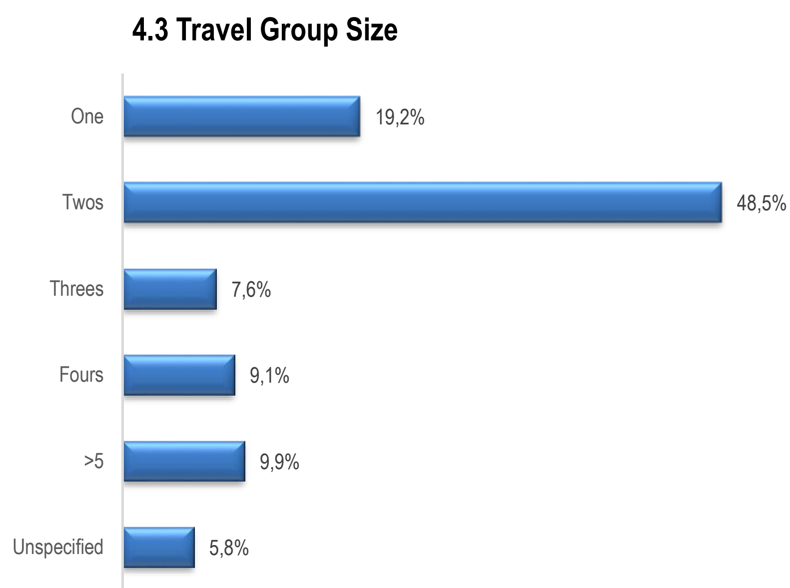
TOP DOMESTIC MARKETS TO THE CAPE WINELANDS, 2017

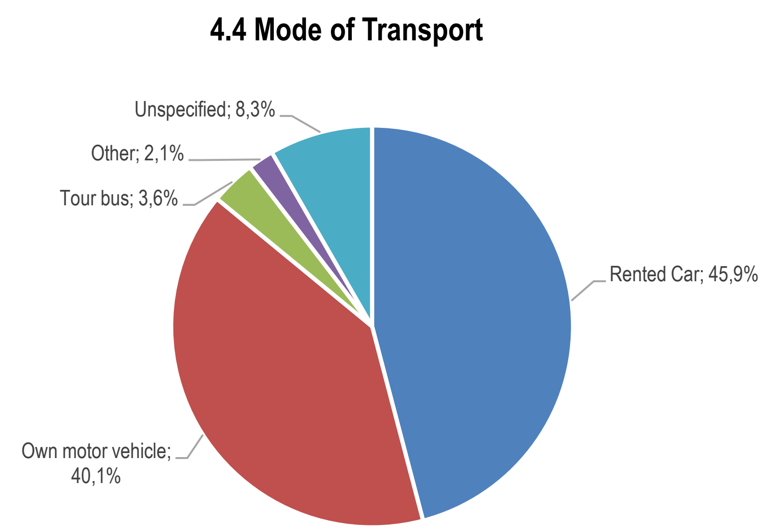


4. Cape Winelands Trends and Patterns



- The age profile of travellers to the Cape Winelands highlights a strong youth market. Over 50% of respondents were between the age groups of 21-35 years (10.9%) and 36-50 years (40.6%).
- Popular travel groups to the region included 48,5% travelling in pairs or as couples, while 19.2% were solo travellers. Visitors who travelled alone can likely include those who primarily travelled for business (5.1%).
- Around 9.9% of respondents travelled in larger groups of five and more. This is particularly popular amongst those who choose to explore the region and wine farms in tour groups or families/friends.
- 2017 trends indicate a fairly equal distribution of respondents who indicated rented cars (45.9%) and their own motor vehicles (40.1%). An additional 3.6% travelled to the region by tour bus.

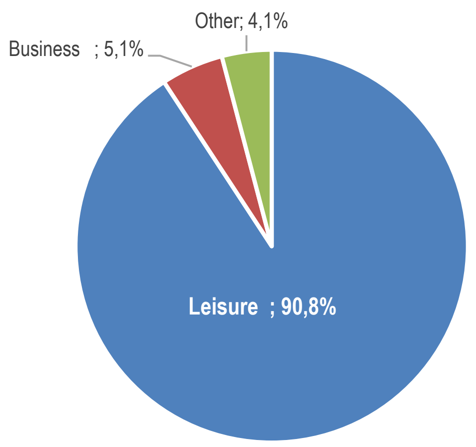




Other: Long distance bus, metered taxi, mini bus taxis, motor bike, passenger cruise liner, shuttle services, public transport and train.

4. Cape Winelands Trends and Patterns

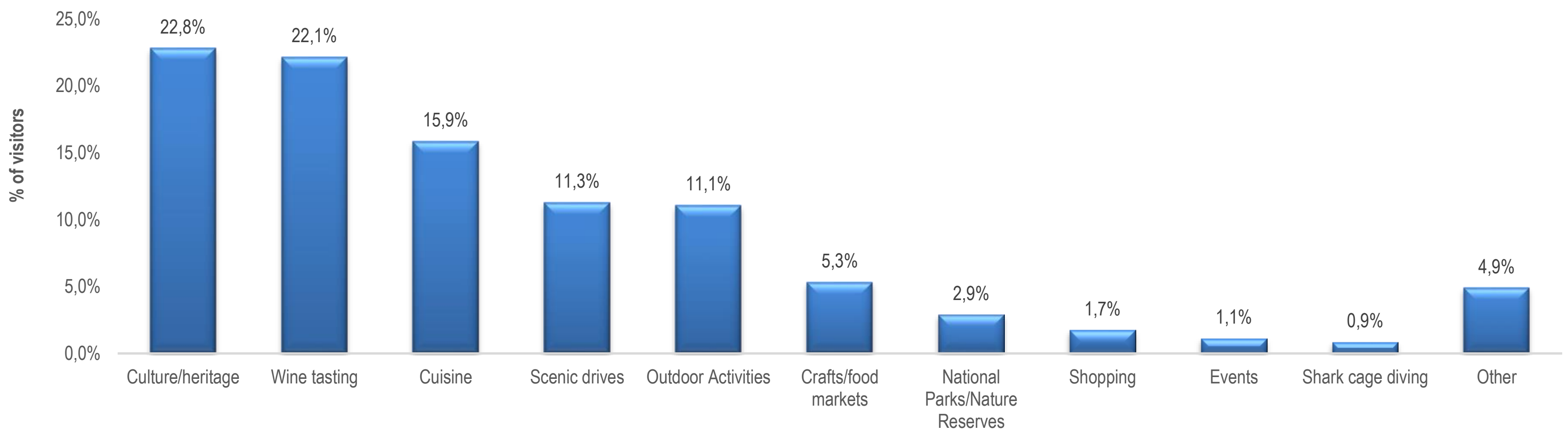
4.5 Main Purpose of Visit



Other: VFR, religion, sport, events, medical and seasonal/migrant worker.

- Holiday/leisure continued to rank as the leading driver for travel to the Cape Winelands.
- Business ranked as the second largest share of respondents. The close proximity between Cape Town and the Cape Winelands provides ease of business and travelling time between the regions.
- Despite the marginal share of travellers who indicated events/festivals as their activities enjoyed in the region, the Cape Winelands holds a strong share of visitors who specifically travels to the region for events. Top wine events includes the annual Wacky Wine Festival in Robertson, Stellenbosch Wine Festival, the Nuy Valley Feast in Worcester amongst many others.
- Culture/heritage, wine tasting, cuisine, scenic drives and outdoor activities ranked as the top five activities visitors enjoyed during their stay. Trends further indicated that wine tasting, winemaking tours, excellent cuisine and magnificent scenery collectively create an irresistible attraction for international and local travellers alike.

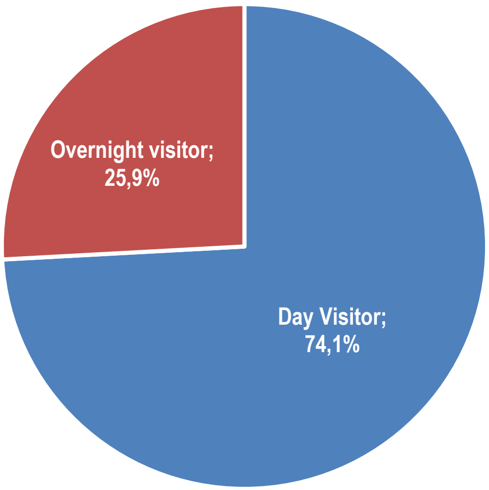
4.6 Top Activities Undertaken in the Cape Winelands



Other: Adventure, flowers, golf, expos/exhibitions, astro tourism, cycling, meetings/incentives, birding, health/wellness, ostrich farms, cruises, fishing, gambling and snow.

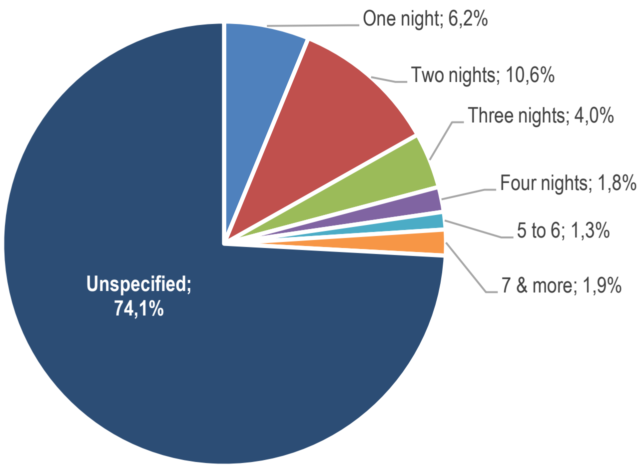
4. Cape Winelands Trends and Patterns

4.7 Overnight vs. Day Visitors

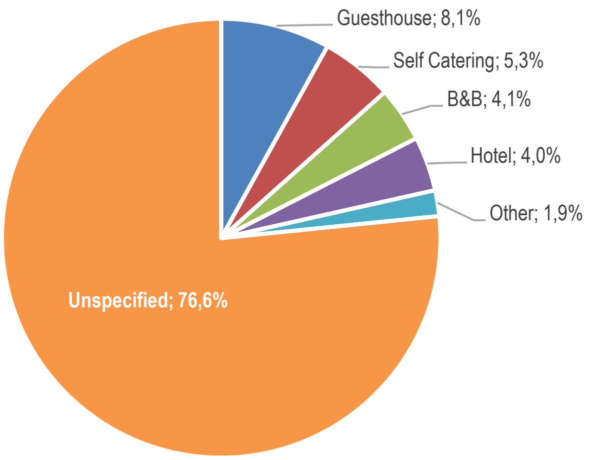


- 2017 Visitor trends reflected over 70% of day trippers to the Cape Winelands and a share of 25.9% overnight stays. A contributing factor to this trend is the popularity in self-drives resulting in travellers moving between towns or regions.
- Travellers to the Cape Winelands preferred accommodation type was guesthouses (8.1%), followed by self-catering (5.3%) establishments.
- Visitors to the region predominantly stayed on average one (6.2%), two (10.6%) and three nights (4.0%). A collective share of 3.2% stayed between 5-6 nights and up to a week and more in the region.

4.8 Average Length of Stay



4.9 Accommodation Usage



Other: Friends/relatives, rented house/Air BnB, backpackers, second home/holiday home and timeshare.

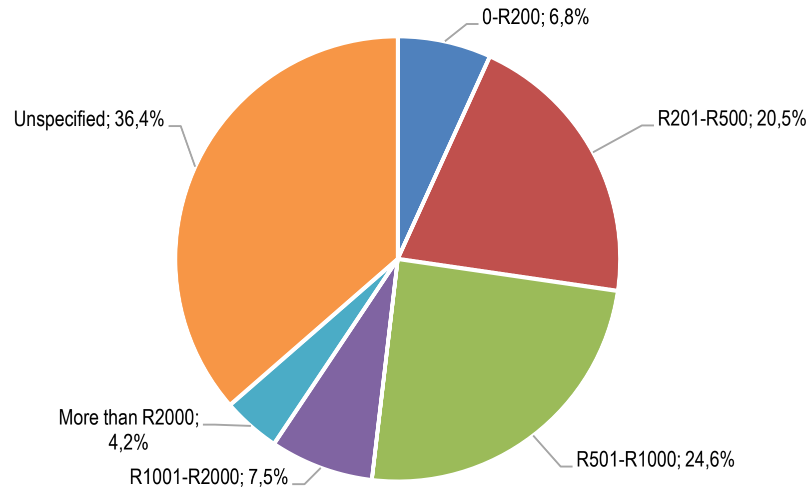
4. Cape Winelands Trends and Patterns

- The daily expenditure patterns amongst travellers ranged between R501-R1000 (24.6%) and R201-R500 (20.5%) per day. The high levels of expenditure can largely be attributed to the popularity of the local cuisine as well as the wine/cellar tours. These two activities ranked amongst the top three activities undertaken in the region and are often paired by visitors.

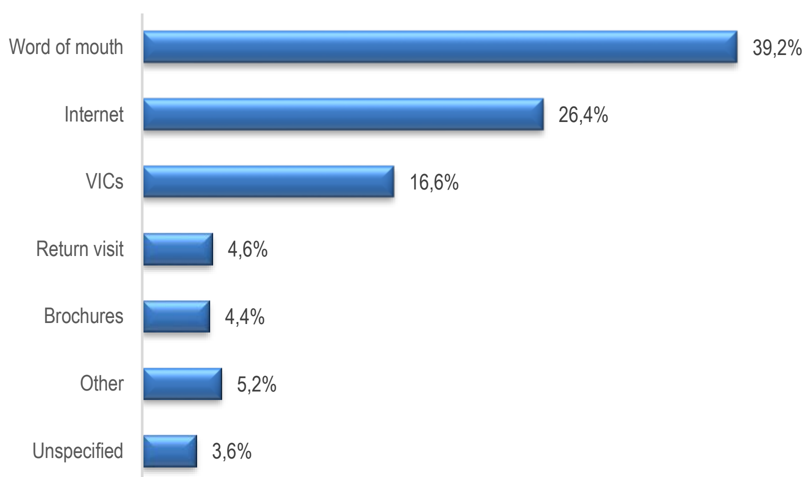
- Stellenbosch alone holds the proud status as the Wine and Food Capital of South Africa. There are more than 80 restaurants offering the most basic dishes to over-the-top and 5-star dining experiences, set both in the town and on many of the wine farms.

- Stellenbosch restaurants were also awarded *Top 10 status in the Eat Out DStv Food Network Restaurant Awards* in 2016. The high demand for cuisine and wine experiences in the region significantly contributes to the local economy.

4.10 Average Daily Expenditure



4.11 Top Information Sources



Other: TV/Radio, books/magazines, travel/agent/tour operator, newspaper and social media.

- Word of mouth (39.2%) and internet/websites (26.4%) ranked as the top sources for obtaining information on the Cape Winelands.

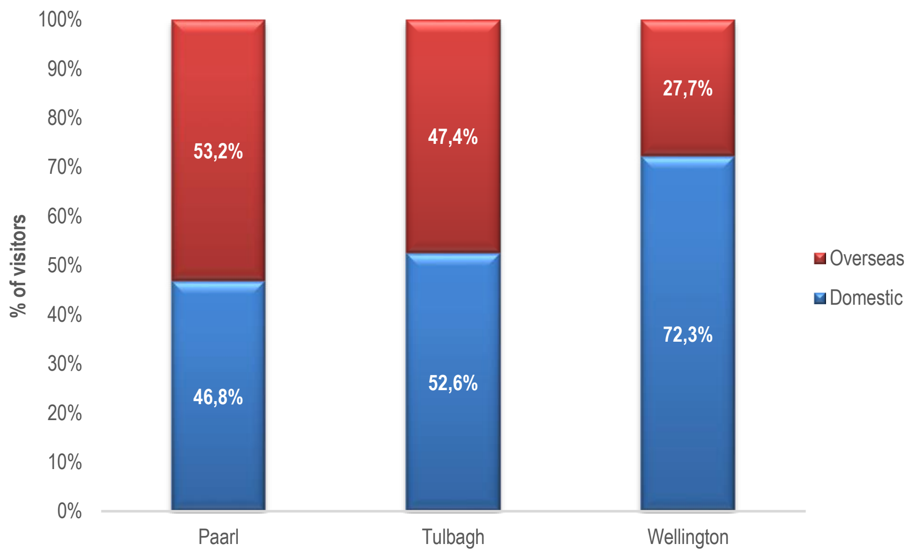
- In the most recent move to further open tourism to all, the Cape Winelands District Municipality, in collaboration with Local Tourism Associations (LTA's) launched brand new tourism apps for the region's 13 idyllic towns.

- The apps are aimed at working alongside existing tourism initiatives and hopes to put all small tourism businesses and communities on the map. It not only gives travellers a real-time insight into what a specific town has to offer in terms of accommodation, cafes, activities, attractions and events but also offers even the smallest of tourism contributors a chance to be seen.

- 4.6% of travellers to the Cape Winelands were return visitors to the region. This is an extremely important segment of the market that offers the potential for even greater growth.

5. Cape Winelands Trends by Town

5.1 Origin of Visitors



- This section provides key trends for towns which recorded a strong sample of responses for the purpose of analysis by Cape Winelands town. The towns represented in this section includes Paarl, Tulbagh and Wellington.
- Trends by town underlines the strength of the domestic market to the region. Over 70% of visitors to Wellington originated from the domestic market, while Paarl recorded a higher share of respondents from the international market (53.2%). The solid demand from the domestic market can also be seen in the top three provinces illustrated in the table below, indicating the Western Cape as the top domestic province across all towns.
- The United Kingdom, Germany, Netherlands and France ranked amongst the top international markets for the towns under review.
- Visitors to Paarl and Wellington attracted a similar age segment, with most visitors between the age group of 36-50 years; while Tulbagh attracted a stronger share of travellers from the senior and retiree market (51-70 years; 34.6%).

5.2 Top 3 Overseas and Domestic Markets

TOP 3 INTERNATIONAL AND DOMESTIC MARKETS BY TOWN, 2017			
Origin/Town	**Paarl**	**Tulbagh**	**Wellington**
Overseas	Germany (44.1%)	Germany (23.1%)	UK (38.4%)
	UK (26.1%)	Netherlands (20.3%)	Germany (28.9%)
	France (5.2%)	UK (17.5%)	Netherlands (10.5%)
Domestic	Western Cape (20.6%)	Western Cape (61.8%)	Western Cape (76.2%)
	Gauteng (4.0%)	Gauteng (23.6%)	Gauteng (11.2%)
	KZN (0.9%)	KZN (4.8%)	Eastern Cape (1.0%)

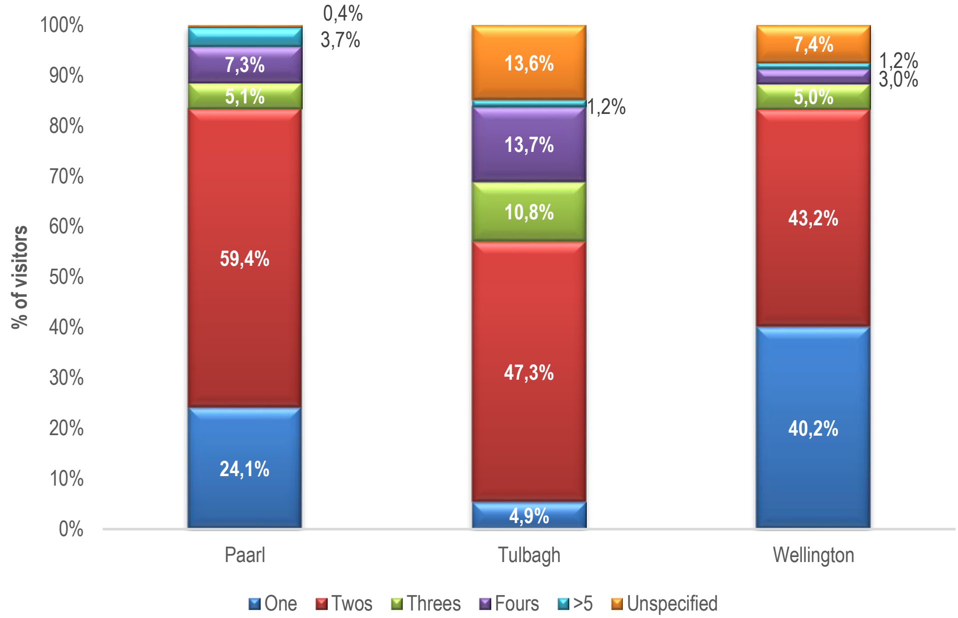
5.3 Age Profile of Visitors

AGE PROFILE OF VISITORS BY TOWN, 2017			
Age Group/Town	**Paarl**	**Tulbagh**	**Wellington**
<20	0.1%	8.2%	0.8%
21-35	6.4%	19.9%	7.8%
36-50	**54.8%**	19.2%	**52.1%**
51-70	34.0%	**34.6%**	37.9%
>70	4.4%	14.6%	1.1%
Unspecified	0.3%	3.4%	0.3%

5. Cape Winelands Trends by Town

- Leisure/holiday ranked as the main reason for travel to the towns represented below and these travellers primarily travelled in pairs or as couples.
- Larger groups of fours (13.7%) were recorded in the town of Tulbagh, while the second largest share of respondents for Paarl (24.1%) and Wellington (40.2%) were solo travellers.
- The Cape Winelands offers a solid events sector with local events occurring throughout the year, including prominent wine events such as the annual Wacky Wine Festival. Of the respondents to Wellington, 3.0% indicated events as they main purpose of visit to the town.
- Business travel further emerged as the second largest share of travellers to the towns of Paarl (6.3%) and Wellington (12.4%). The close proximity between Cape Town and these towns provides ease of business travel.

5.4 Travel Group Size



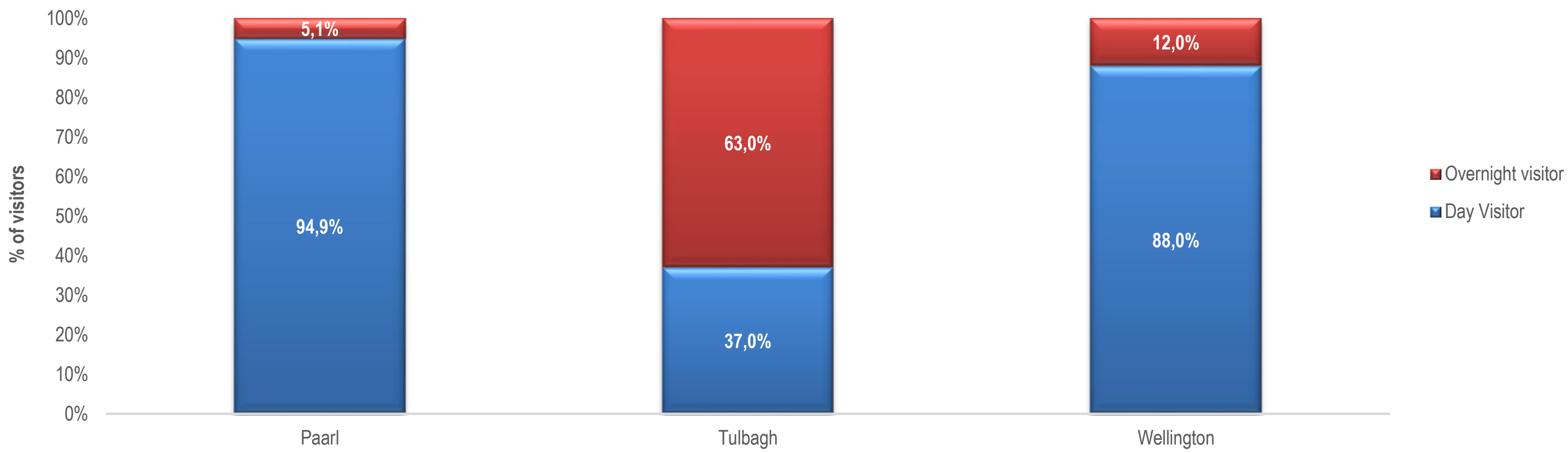
5.5 Main Purpose of Visit

Purpose of Visit/Town	Paarl	Tulbagh	Wellington
Leisure	91.6%	95.4%	79.2%
Business	6.3%	0.4%	12.4%
Education	1.5%	0.3%	2.9%
Honeymoon/Weddings	-	1.8%	0.2%
Events	0.3%	0.5%	3.0%

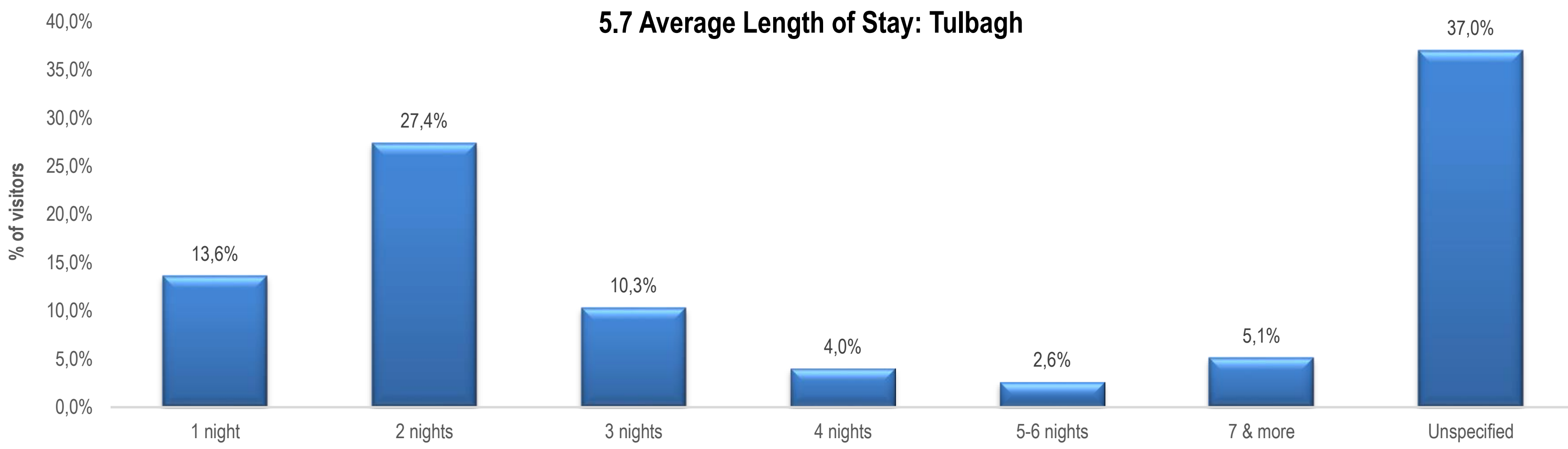
5. Cape Winelands Trends by Town

5.6 Overnight vs. Day Visitors

- Almost all respondents to Paarl (94.9%) and Wellington (88.0%) were day trippers, while 63.0% of travellers to Tulbagh stayed overnight. Visitors to Tulbagh depicted in the figure below mostly stayed for an average of either one, two or three nights.



5.7 Average Length of Stay: Tulbagh



6. Acknowledgements

Acknowledgements and many thanks go to the Cape Winelands District Municipality, as well as the following tourism offices for supplying the data which made this publication possible, and whose continued and unwavering support will sustain the forthcoming issues.

The participating local tourism offices in the Cape Winelands:

- *Tulbagh Tourism*
- *Ceres Tourism*
- *Stellenbosch Tourism*
- *Worcester Tourism*
- *Paarl Tourism*
- *Wellington Tourism*
- *Robertson Tourism*
- *Montagu Tourism*

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