



Cape Winelands Regional Trends

2021

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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

Between January and December 2021, a total of **1 314** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Cape Winelands and **1 256** responses were received over the same period in 2020.

The participating Tourism Offices were:

	2020	2021
Ceres	17	96
Paarl	624	143
Tulbagh	132	590
Wellington	410	485
Franschoek	73	0
Worcester	0	0
Stellenbosch	0	0



3. Executive Summary

- Situated within easy reach of Cape Town and famed for producing some of the world's finest wines, the Cape Winelands delight travellers with their magnificent scenery, fine wines and mouth-watering meals.
- Award-winning wine estates sprawl along slopes covered with lush, green vines and look out onto scenic mountain landscapes. Quaint little towns filled with characteristic Cape Dutch architecture reflect the region's French hugenot influence.
- Known as the gourmet capital of South Africa, beautiful Franschhoek boasts fine dining restaurants and excellent patisseries. Apart from ordinary wine tastings, visitors can sample the area's delicious chocolate, cheese and olives.
- A mixture of diverse cultural backgrounds gives the Western Cape a demographic profile quite different from that of the rest of the country. Centuries of trade created a population with genetic and linguistic links to different parts of Europe, Southeast Asia, India and Africa. Key trends and patterns observed amongst visitors to the Western Cape confirms this trend, underlining the strong and consistent demand for travel from Europe.
- The region is an extremely popular tourist destination and well visited by both international and domestic visitors.
- However, as a result of the devastating Covid-19 pandemic, surveys collected at the respective Visitor Information Centre's (VIC's) decreased by a whopping 60.1% in 2020 going from a combined total of 3,151 surveys in 2019 to only 1,256 over the same period in 2020.
- Be that as it may an increase of 4,6% was received in 2021.

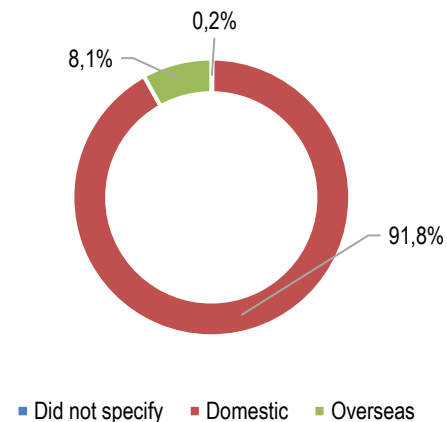


4. Cape Winelands Visitor Trends & Patterns

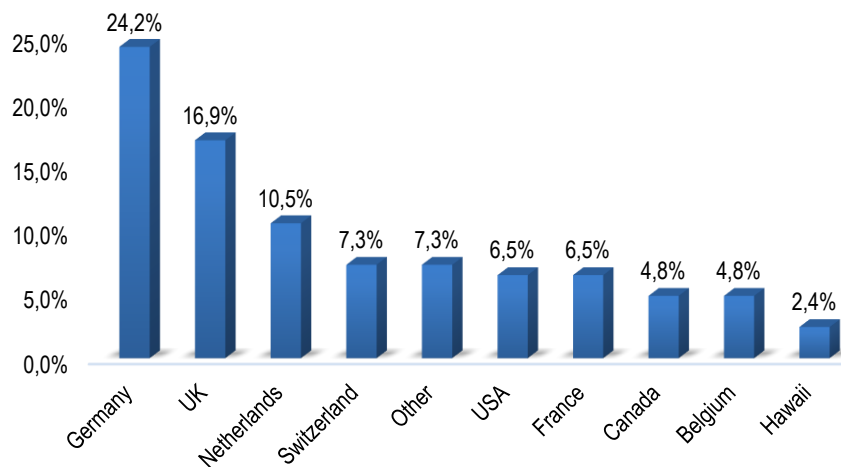
4.1 Origin of Visitors

- Domestic visitors continue to make up the largest share of travellers in the Cape Winelands with over 90% of visitors recorded in 2021 as compared to 8,1% of international travellers.
- Following a similar trend as that of 2019 and 2020, traditional markets such as the United Kingdom, Germany, Belgium, France and Netherlands also continue to rank as the region's top five international markets.
- When observing the top 10 overseas markets into the region, it is evident that European market dominates as the regions' largest international source markets and accounted for the majority of the international markets in the Cape Winelands in 2020 and 2021.
- On a domestic level, the Western Cape led as the top province in 2020 and continued to do so in 2021 as well, accounting for over 70% of visitors from the domestic market. Gauteng and KwaZulu Natal followed as the second and third most popular provinces to the region. These findings further illustrate that despite the impact of COVID-19 and strict travel regulations, the Western Cape locals continued to explore their province.

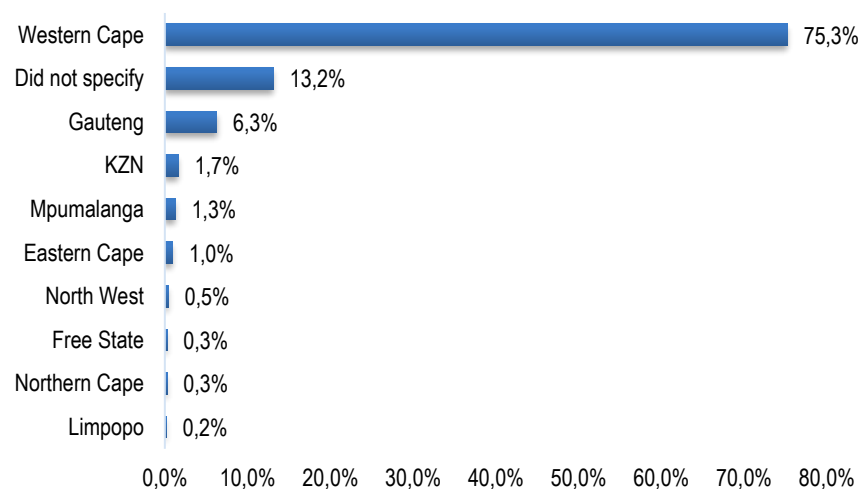
% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO THE CAPE WINELANDS, 2021



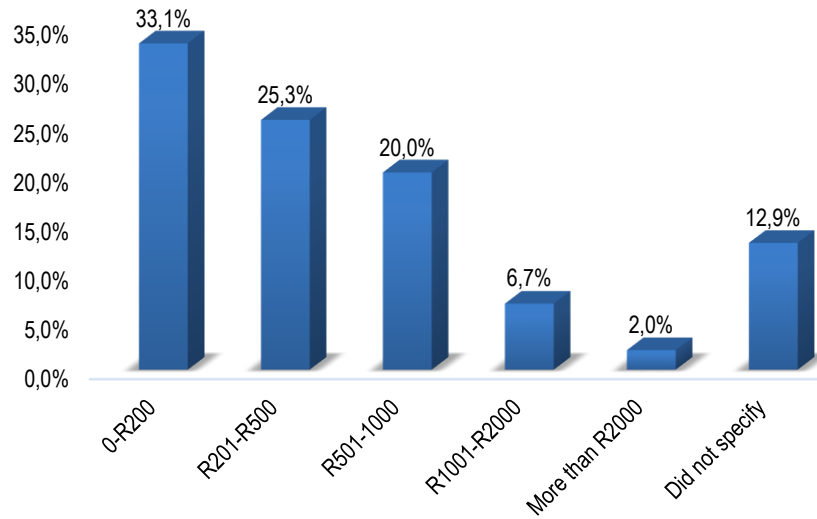
TOP 10 INTERNATIONAL MARKETS TO THE CAPE WINELANDS, 2021



% SHARE OF DOMESTIC VISITORS TO THE CAPE WINELANDS, 2021

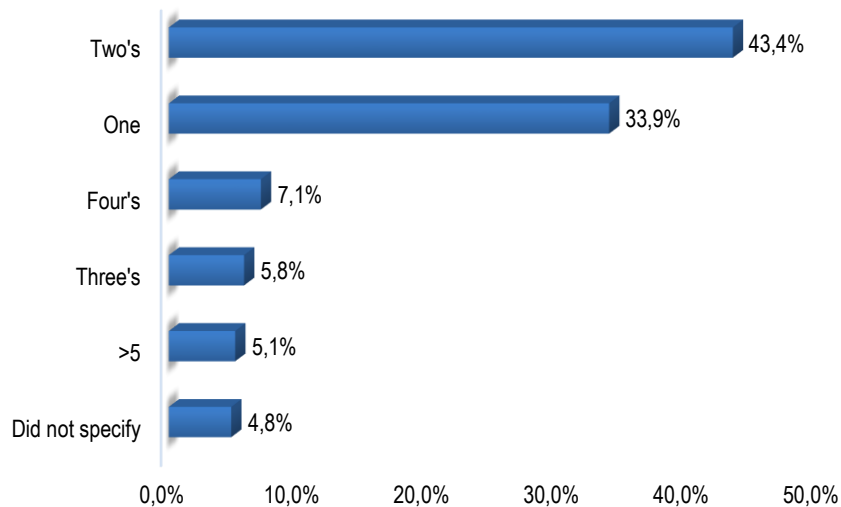


4.2 Average Daily Spend

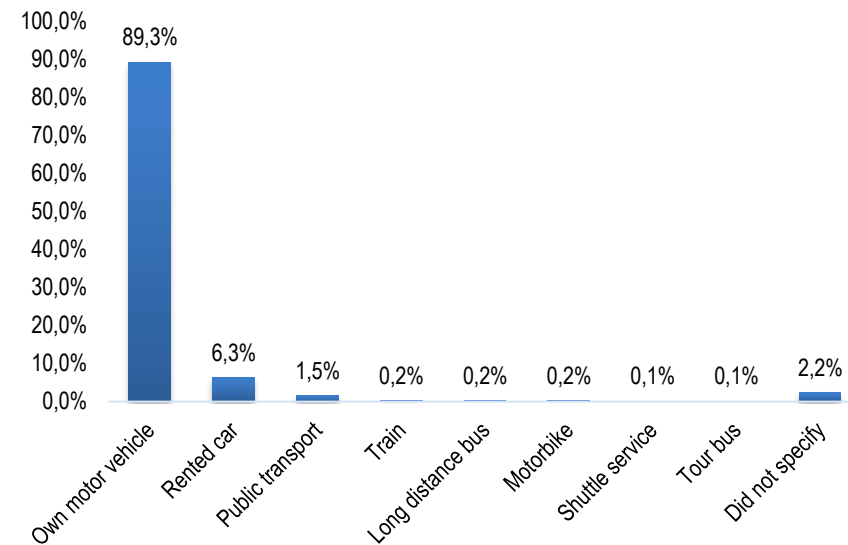


- Visitors to the Cape Winelands spent less than R200 on average (33,1%) while 25,3% of visitors spent between R200 – R500.
- Being a desirable destination, the region caters for all age categories. With most respondents travelling in pairs or on their own throughout the year.
- Just over half of respondents travelled alone and 38,7% in pairs.
- As such own motor vehicles (89,3%) and rented cars (6,3%) were the preferred modes of transport over the year. This could be as a result of the high percentage of locals making short trips around the region as well as those in surrounding regions.

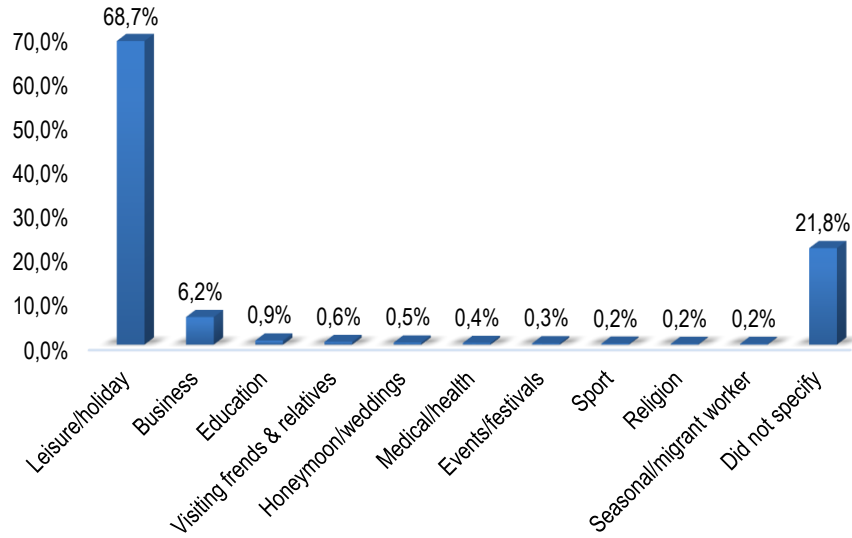
4.3 Group size



4.4 Mode of transport

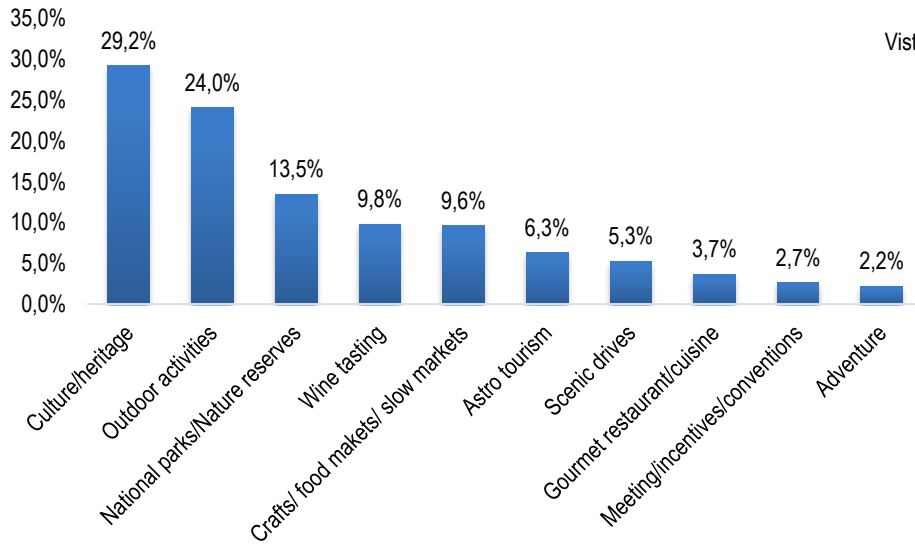


4.5 Purpose of visit

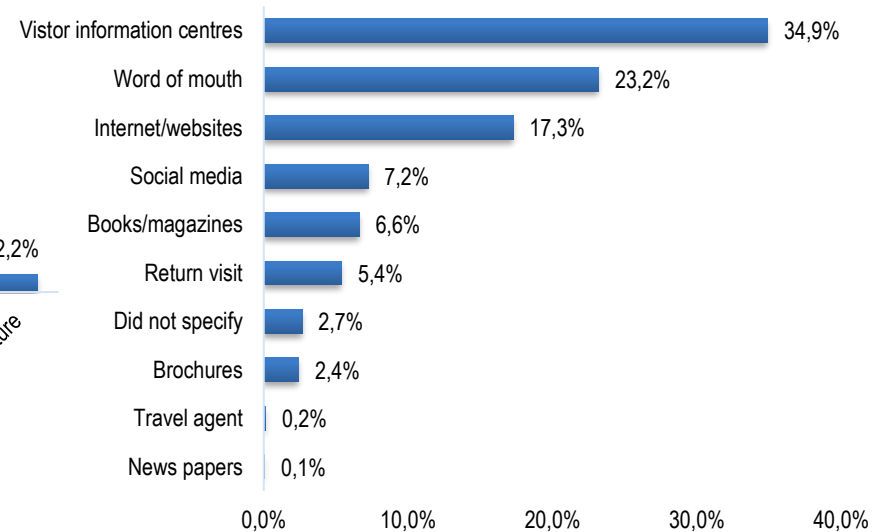


- Visitor Information Centres (34.9%), Word of Mouth (WOM) 23.2% and Internet/websites (17.3%) ranked as the top sources for obtaining information in the Cape Winelands.
- The most prominent motivating factor for travel to the region was for the purpose of holiday/leisure (68,7%) and Business (6,2%). As it was for 2020 as well.
- Education ranked as the third most popular reason for visiting the region.
- Culture/heritage, outdoor activities, national parks, wine-tasting and crafts/ food markets ranked as the top five activities visitors enjoyed during their stay in the region.

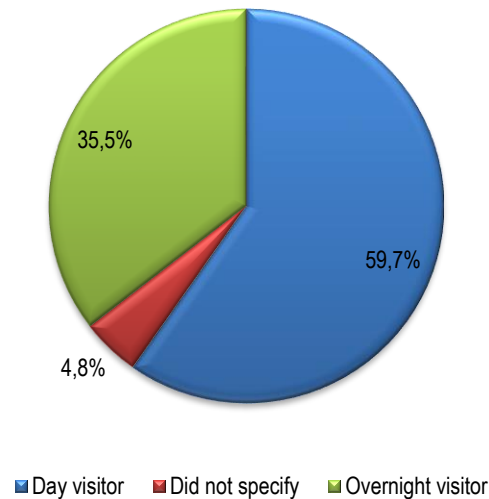
4.6 Top Activities Undertaken in the Cape Winelands



4.7 Top Information Sources

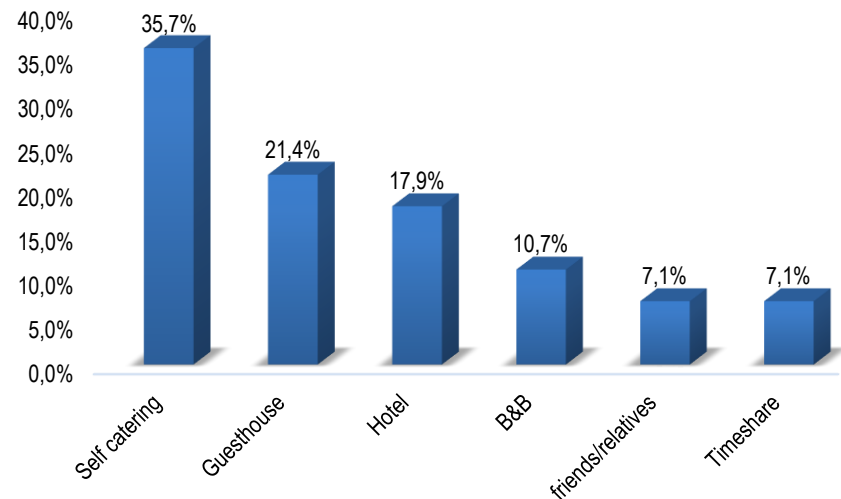


4.8 Overnight stay

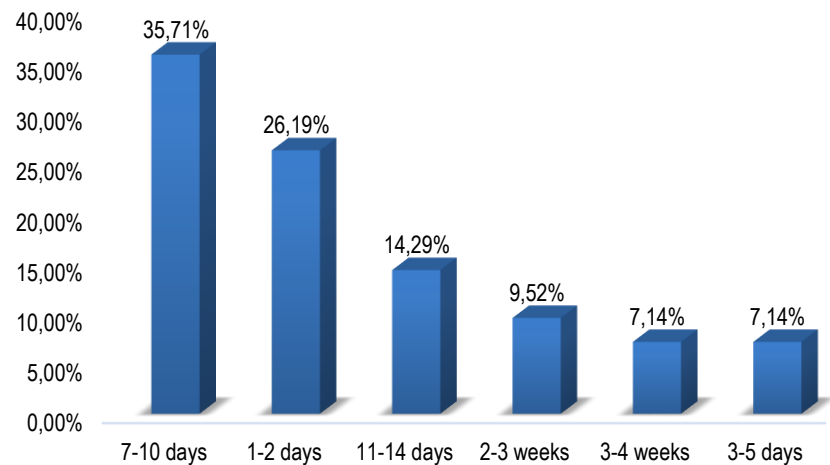


- The Cape Winelands is vast and filled with events and happenings, so travelers need to ensure they set enough time aside to enjoy the beautiful surroundings, taste wine, pick strawberries and participate in numerous events hosted by the various regions.
- When looking at the average length of stay of visitors to the Cape Winelands, the largest share of travelers (16,6%) indicated 2-3 nights and 8,1% stayed over for one night.
- 59,7% of travellers to the Cape Winelands were day visitors with 35,5% being overnight visitors .
- Self catering, Guesthouses, B&B's and hotels were the most popular accommodation choices among overnight visitors to the region.

4.9 Accommodation Usage



4.10 Average Length of Stay



5. Langeberg Visitors

- Accommodation establishments within the Langeberg region welcomed a total of 368 180 visitors in 2021. A magnificent 92,8% increase when compared to the 190 916 visitors welcomed in 2020.

	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Total
Robertson	5 260	5 465	0	0	0	134	1 402	2 957	2 957	4 353	5 137	10 749	38 414
Montagu	26 168	22 220	0	0	0	76	1 383	11 263	19 966	22 508	19 822	23 379	146 785
McGregor	695	945	0	0	0	73	93	680	603	516	712	1 400	5 717

	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Total
Robertson	9 586	9 026	10 397	11 597	7 029	4 730	4 851	6 978	10 242	10 838	11 364	15 620	112 258
Montagu	15 542	17 850	24 743	21 965	16 682	14 391	15 739	15 739	20 140	24 201	24 201	31 123	242 316
Mc Gregor	777	1 137	1 203	1 328	1 034	789	920	843	1 272	841	1 237	2 225	13 606

% Growth	2020 vs 2021
Robertson	192,2%
Montagu	65,1%
McGregor	138,0%



6. Langeberg Attractions

- Attractions in the Langeberg area welcomed over 50,000 visitors in 2021 as compared to the visits received in 2020. 83,2% growth levels were seen, the highest received over the past three years.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2021	2020
Nerina Guest Farm	54	47	48	54	23	10	24	8	45	125	76	127	641	423
Protea Tractor Trip	554	117	477	440	342	232	263	263	363	389	320	788	4 548	2 912
Wahnfried	14	134	142	159	103	93	46	140	178	304	100	252	1 665	1 877
Montagu Museum	c	l	o	s	e	d								1 060
Birds Paradise	952	625	811	937	731	461	580	574	654	825	676	1 381	9 207	6 240
Flying Feet	0	0	0	163	63	67	20	20	54	95	95	170	747	0
Eseltjiesrus Donkey Sanctuary	135	168	265	357	150	164	285	285	233	258	171	323	2 794	0
Viloensdrift River Cruises	1 046	1 352	1 492	1 830	959	635	229	527	1 105	1 400	1 652	3 267	15 494	8 397
Avalon Springs	0	730	1 224	1 049	761	534	0	0	0	1 927	1 715	4 712	12 652	4 615
Lords Wines	40	180	950	180	550	215	353	398	478	910	614	1 100	5 968	3 799

	2021	2020	% GROWTH
Nerina Guest Farm	641	423	51,5%
Protea Tractor Trip	4 548	2 912	56,2%
Wahnfried	1 665	1 877	-11,3%
Montagu Museum	0	1 060	-100,0%
Birds Paradise	9 207	6 240	47,5%
Flying Feet	747	0	/
Eseltjiesrus Donkey Sanctuary	2 794	0	/
Viloensdrift River Cruises	15 494	8 397	84,5%
Avalon Springs	12 652	4 615	174,1%
Lords Wines	5 968	3 799	57,1%



6. Acknowledgements

Acknowledgements and many thanks go to the following 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*
- *Paarl Tourism*
- *Wellington Tourism*
- *Langeberg Municipality.*

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