Winelands
Tourism Trends
January – December 2022

Contents

1. Executive Summary

- During the period highlighted in this report (Jan—Dec 2022) indicates that the largest proportion of travellers to the Winelands originated from the domestic market (86,0%), from within the Western TCape (74.9%).

- The overseas market accounted for 14,0% of visitors during this period, with the United Kingdom, Germany and Netherlands accounting for most of the overseas visitors.

- Over 90% of visitors travelled to the Winelands for leisure/holiday, while 2.9% came for education and 1.1% travelled for business.

- Some 43.3% of visitors took day trips to the Winelands, whereas 56.7% of visitors stayed for longer periods. Regarding length of stay, two and three nights were the most popular choices for those who indicated they had stayed overnight. The age groups 36—50 and 51—70 years made up the largest proportion of respondents who travelled to the region either in pairs or on their own.

- Attractions from the Langeberg municipality are highlighted in this report. A total of 5 946 visitors, visited the attractions January and December 2022. These attractions experienced a positive recovery when compared to 2019. Lords Wines a beautiful wine farm nestled in the McGregor Valley. This was followed by the Nerina Guest Farm, with a recovery rate of (178.0%), Wahnfried (138.1%) and Eseltjierus Donkey Estate (135.1%).

- The Stellenbosch wine valley analysis is also included in this report and was collated with the use of mobile location data insights.

Winelands
Visitor Trends

Wesgro Primary Research: Regional Visitor Tracking Surveys

Methodology and Sample Size

This report provides an overview of the tourism trends and patterns in the 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.*

Between January and December 2022, a total of **3 413** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Winelands while **1 314** responses were received over the same period in 2021.

Town	Number of Surveys
Ceres	1 959
Paarl	432
Tulbagh	923
Wellington	99
Total Surveys	**3 413**

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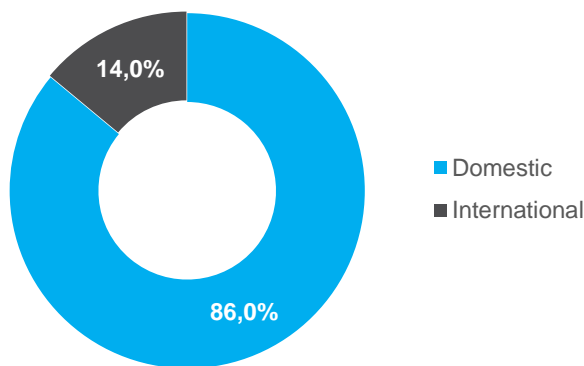
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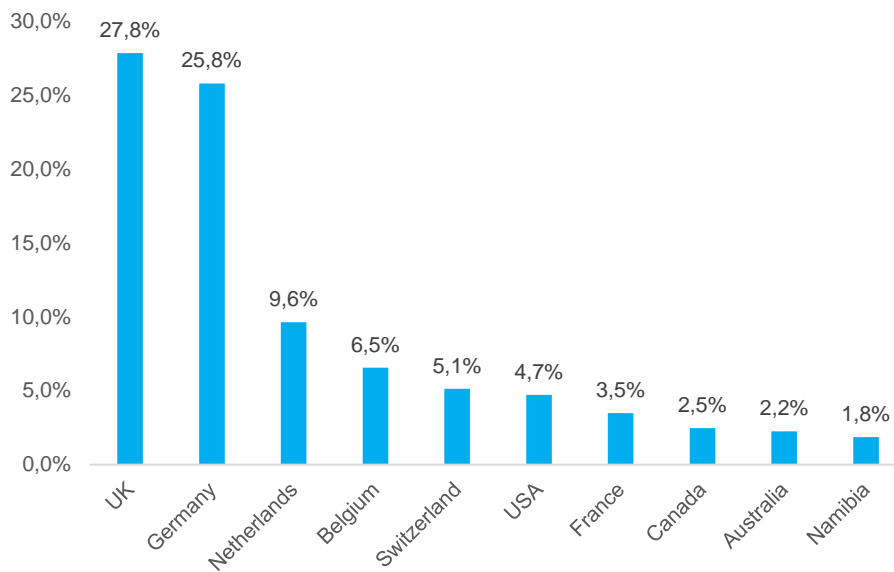
3. Winelands Visitor Trends & Patterns

3.1 Origin of Visitors

- The domestic market accounted for the largest (86.0%) share of visitors to the region between January and December 2022 and the overseas market made up (14.0%).

- The United Kingdom ranked as the region's top international market for tourists followed by Germany and the Netherlands. According to the World Population Review in 2020, all three countries were among the top 15 wine-exporting countries in the World. According to a report published by Statisa (2023), Germany was one of the top 10 countries in wine exports worldwide in 2022, based on volume(in million hectoliters).

- The largest share of domestic travellers to the region came from within the Western Cape (74.9%), this confirms that the Winelands is a popular tourism destination among locals. Visitors to the Winelands surpassed numbers of tourists to other regions, namely: Overberg, Weskus, Garden Route & Klein Karoo and the Cape Karoo. Gauteng accounted for 8.4% of domestic visitors to the region, and 3.2% of domestic travellers came from KwaZulu-Natal.
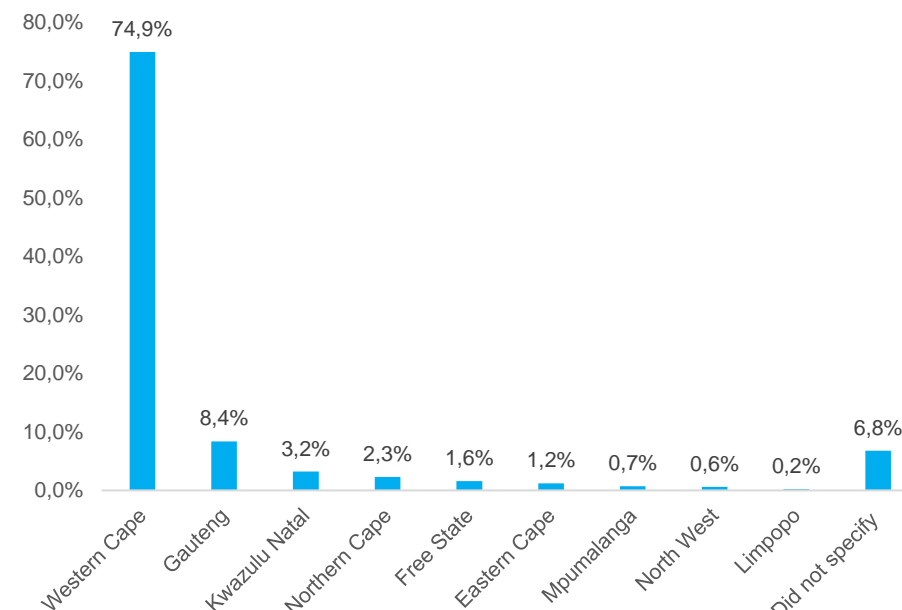
% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO THE WINELANDS, 2022

Domestic 86,0%
International 14,0%

TOP 10 INTERNATIONAL MARKETS TO THE WINELANDS, 2022

Country	%
UK	27,8%
Germany	25,8%
Netherlands	9,6%
Belgium	6,5%
Switzerland	5,1%
USA	4,7%
France	3,5%
Canada	2,5%
Australia	2,2%
Namibia	1,8%

ORIGIN OF DOMESTIC VISITORS TO WINELANDS, 2022

Province	%
Western Cape	74,9%
Gauteng	8,4%
Kwazulu Natal	3,2%
Northern Cape	2,3%
Free State	1,6%
Eastern Cape	1,2%
Mpumalanga	0,7%
North West	0,6%
Limpopo	0,2%
Did not specify	6,8%

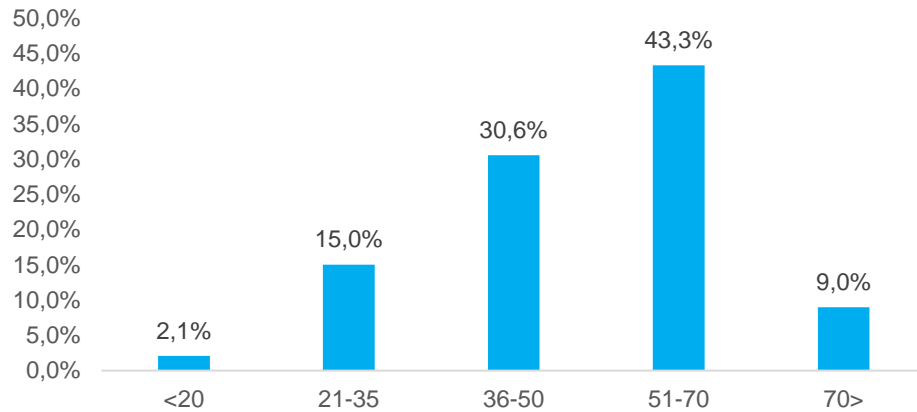**wesgro**
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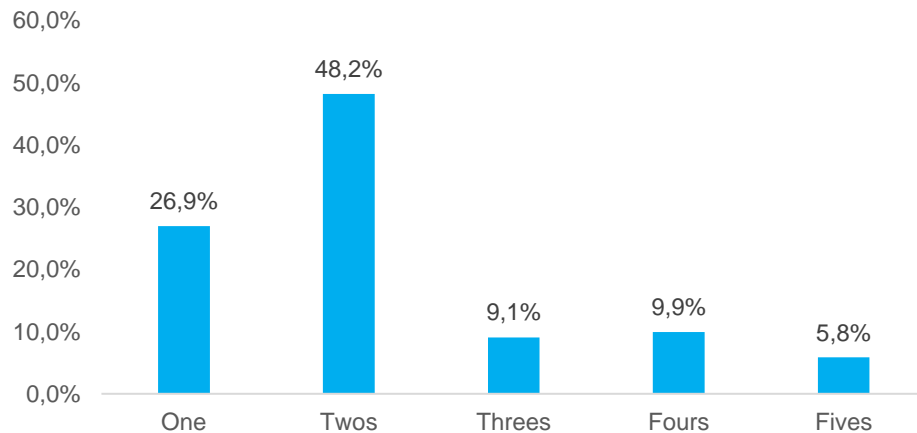
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3. Winelands Visitor Trends & Patterns
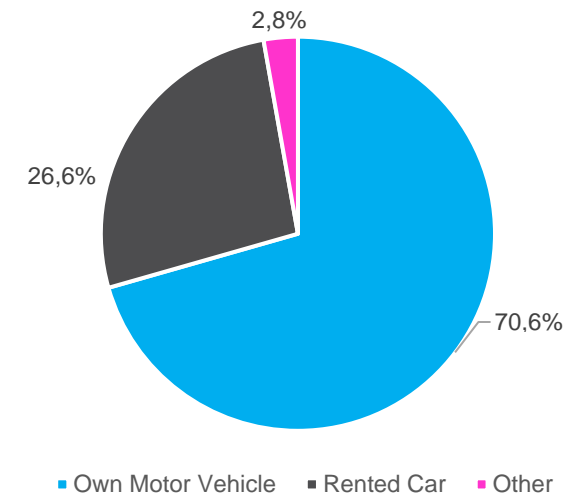
3.2 Age Profile of Visitors

- The greatest number of visitors to the Winelands (73.9%) were senior citizens (51–70 years) and adults (36–50 years) ranked as the most popular amongst visitors to the Winelands, with a total of 73.9% when combined.

- Some 48.2% of visitors travelled to the region in pairs, while 26.9% were on their own. And 13.8% of tourists travelled in groups of three or more.

- Most of the visitors who travelled to the region preferred using their own motor vehicles (70.6%) or rented cars (26.6%).
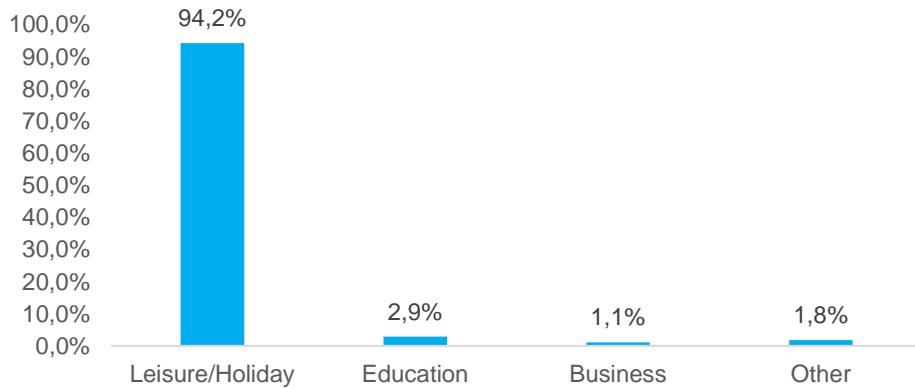
3.3 Travel Group Size

3.4 Mode of Transport

■ Own Motor Vehicle ■ Rented Car ■ Other

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3. Winelands Visitor Trends & Patterns

3.5 Purpose of Visit

- The main motivation for travel to the Winelands was holiday/leisure, with 94.2% visiting for this reason. Some 2% of travellers came for education and 1.1% visited for business reasons.

- Those in the 'Other' category included travellers visiting friends and relatives attending, honeymoon/weddings and those traveling for religious purposes and medical services.

- The top 3 information sources that played a major role in drawing visitors to the region and attractions were internet/websites (35.2%), word of mouth (30,0%) and return visits (10.1%).

- Culture/heritage (24.7%), scenic drives (16.5%), and outdoor activities (13.9%) were the top three activities undertaken in the region.

3.6 Top Information Sources
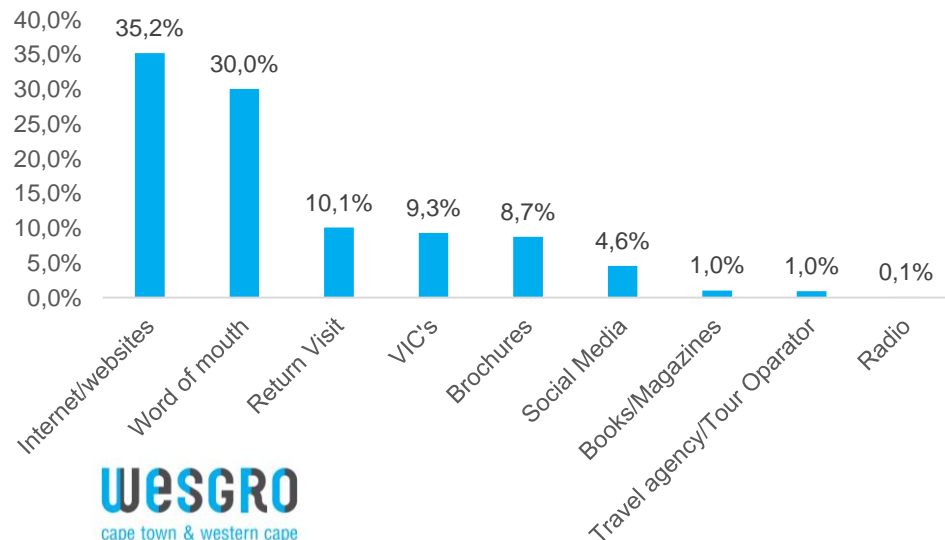
3.7 Top Activities undertaken in the Winelands

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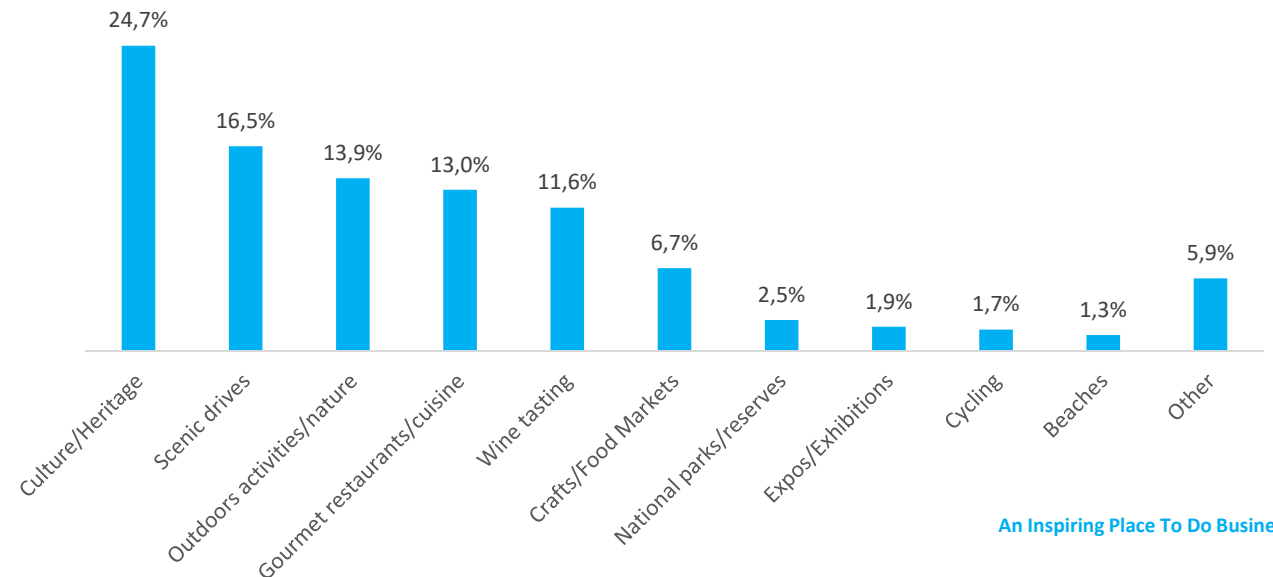
3.   Winelands Visitor Trends & Patterns

3.8 Overnight Stays

43,3%

56,7%

■ Day Visitor   ■ Overnight Visitor
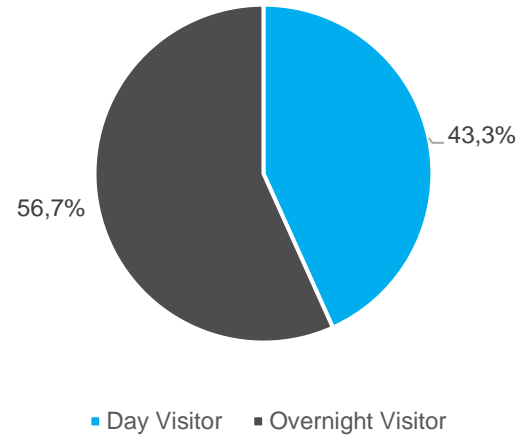
- Just over 50% of respondents indicated that they had stayed overnight in the region, while 43.3% were day visitors. Relaxation, scenery, socialising with friends and family were some of the most common reasons for day visitors travelling to the Winelands.

- When looking at the average length of stay of visitors to the Winelands, the largest share of travelers stayed for two to three nights.

- Respondents indicated their preferred accommodation type to be self-catering (30,3%), followed by guest houses (24.9%) and hotels (24.5%).

3.9 Average Length of Stay

| | 50,0% |
| 45,0% |
| 40,0% |
| 35,0% |
| 30,0% |
| 25,0% |
| 20,0% |
| 15,0% |
| 10,0% |
| 5,0% |
| 0,0% |

17,1%   43,8%   22,6%   7,2%   5,9%   3,3%

One night   Two nights   Three nights   Four nights   5 to 6   7 and more
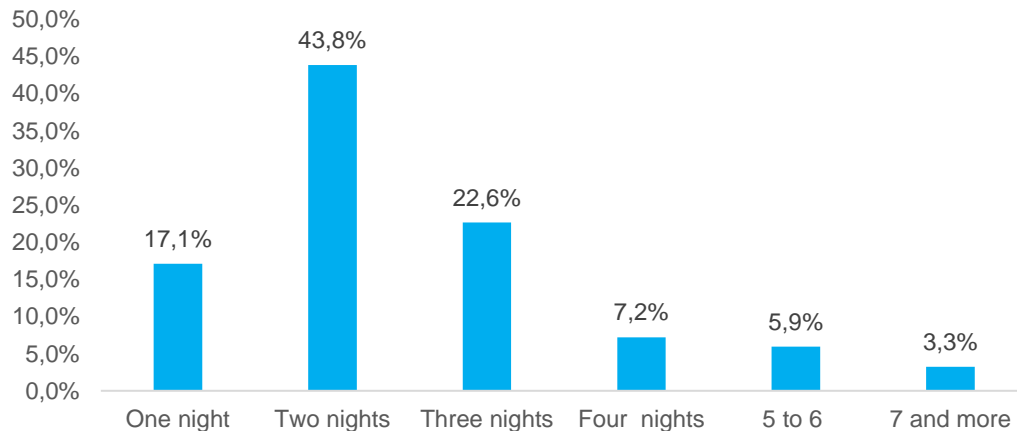
3.10 Accommodation Usage

35,0%
30,0%
25,0%
20,0%
15,0%
10,0%
5,0%
0,0%

30,3%   24,9%   24,5%   17,3%   2,9%

Self-Catering   Guesthouse   Hotel   B&B   Other

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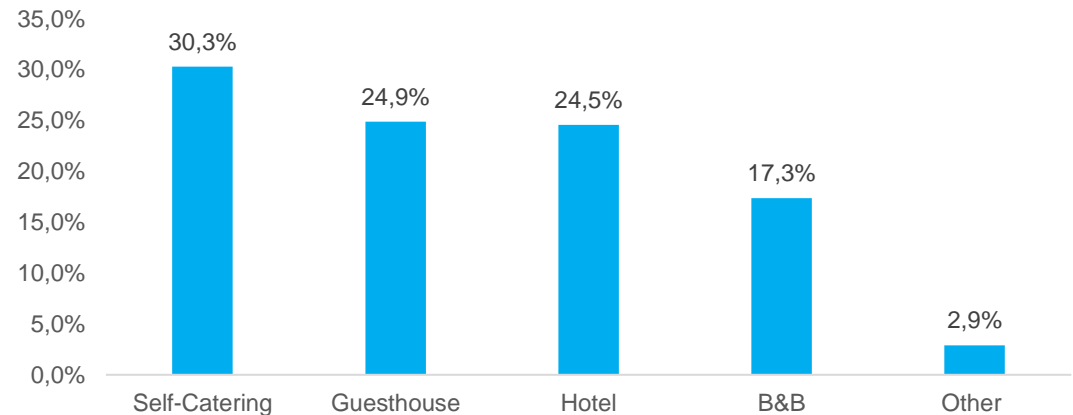
3. Winelands Visitor Trends & Patterns

3.11 Average Daily Spend

Bar chart values:
- 0-R200: 3,2%
- R201-R500: 34,0%
- R501-R1 000: 37,9%
- R1 001-R2 000: 23,4%
- More than R5 000: 1,6%

3.12 Average Spend on Accommodation

Bar chart values:
- 0-R200: 1,1%
- R201-R500: 4,9%
- R501-R1 000: 27,9%
- R1 001-R2 000: 53,9%
- R2 001-R5 000: 10,1%
- R5 001-R10 000: 1,8%
- R10 001 & more: 0,2%
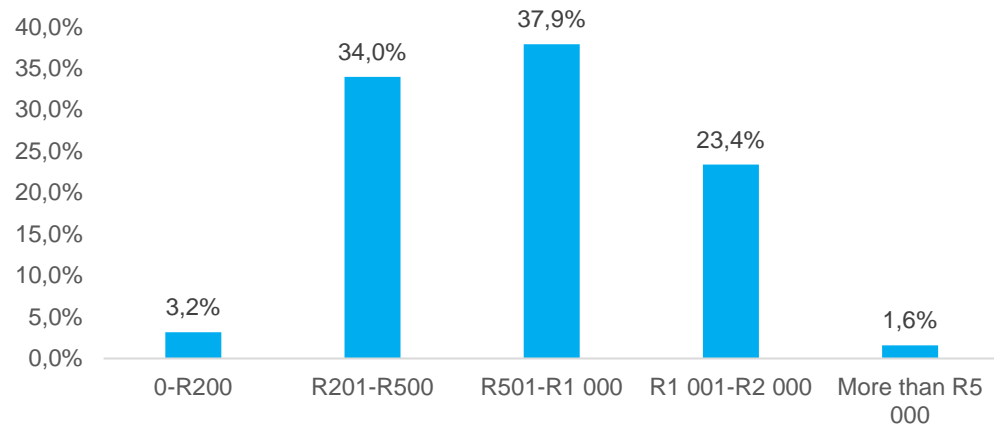
- Nearly 40% of visitors to the Winelands spent between R501 and R1000 per day in the region, while 34.0% indicated an average daily spend of R201–R500, and 23.4% said they spent R1 001–R2 000.

- Regarding how much they spent on accommodation, just over 50% of visitors spent between R1001–R2000, whereas 27.9% indicated that their expenses were R501–R1000 per day.

- Based on the average daily spend and average spend on accommodation, visitors in the Winelands can be classified as medium spenders. This information can be effectively used in targeting potential visitors and in promoting accommodation establishments and leisure activities in the region.

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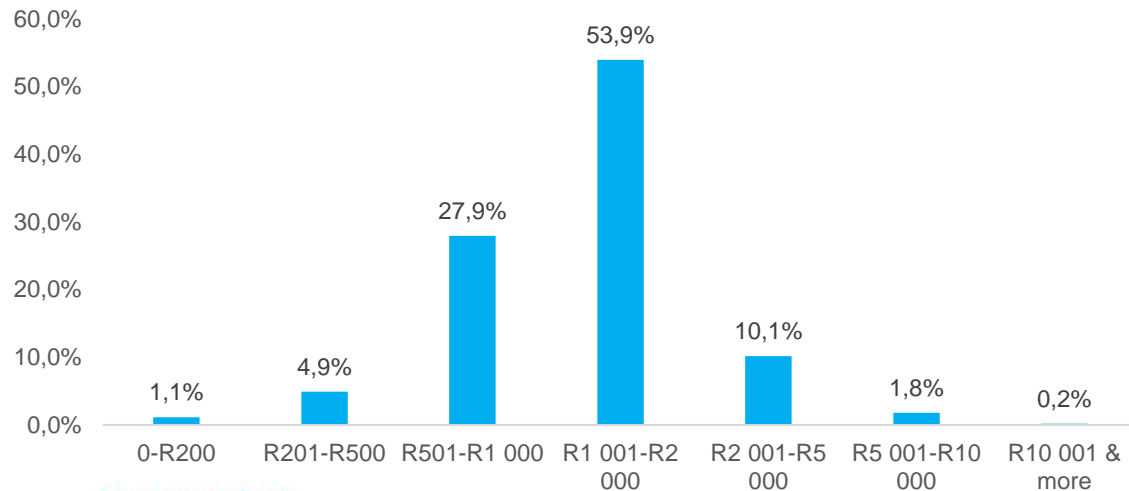
Langeberg Visitors & Attractions

4. Langeberg Visitor Trends

- More than 450 000 people visited the Langeberg region in 2022, a year-over-year (YOY)% change of 22,3% when compared to 2021.

- Montagu attracted the most visitors during the period under review (2018 – 2022) with a total of (1 303 539) million arrivals.

Annual Tourist Arrivals to (Robertson, Montagu & McGregor)
2018 - 2022

	2018	2019	2020	2021	2022
Roberson	81 873	78 695	38 414	112 258	140 344
Montagu	337 257	283 080	146 785	242 316	294 101
McGregor	15 147	13 342	5 717	13 606	15 920

	2 018	2 019	2 020	2 021	2 022
No. of visitors	434 287	375 117	190 916	368 180	450 365
YOY % Change		-13.6%	- 49.1%	92.8%	22.3%
19/22 recovery					120.1%

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4. Langeberg Visitor Trends

- The following graphs show the visitor numbers per town for the Langeberg area. Montagu received the most visitors in 2022, followed by Robertstson and McGregor, with all three towns showing a positive Y-O-Y % growth when compared to 2021.

Montagu Tourist Arrivals, 2018 - 2022

	2018	2019	2020	2021	2022
Montagu	337 257	283 080	146 785	242 316	294 101
Y-O-Y % Change		-16,1%	-48,1%	65,1%	21,4%
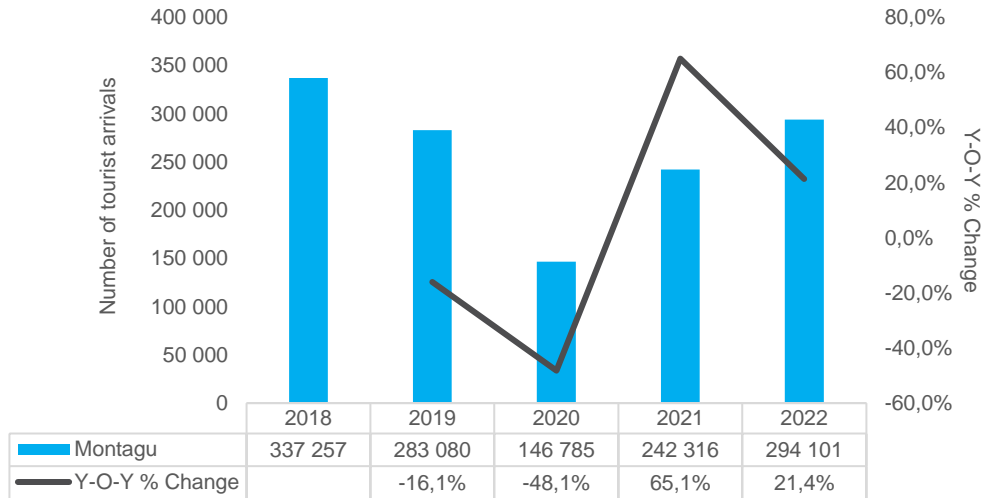
Robertson Tourist Arrivals, 2018 - 2022

	2018	2019	2020	2021	2022
Roberson	81 873	78 695	38 414	112 258	140 344
Y-O-Y % Change		-3,9%	-51,2%	192,2%	25,0%
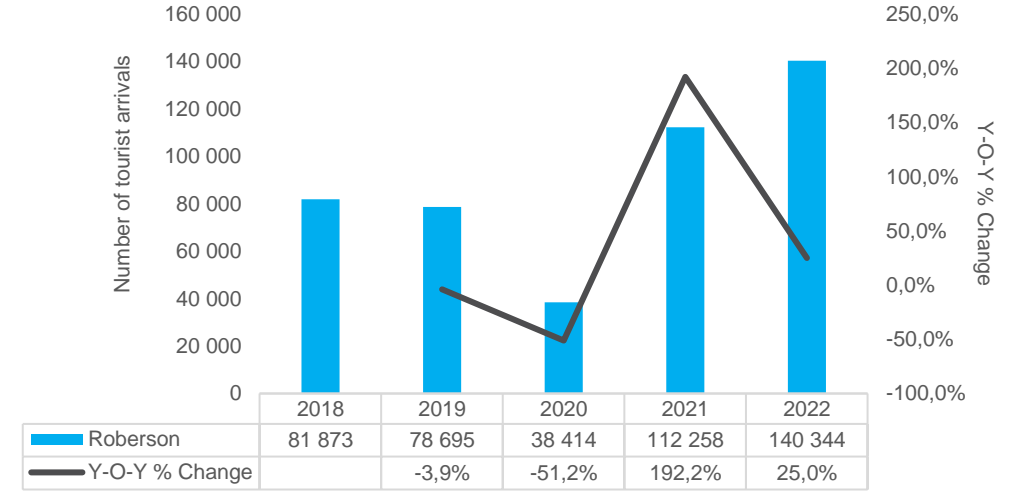
McGregor Tourist Arrivals, 2018 - 2022

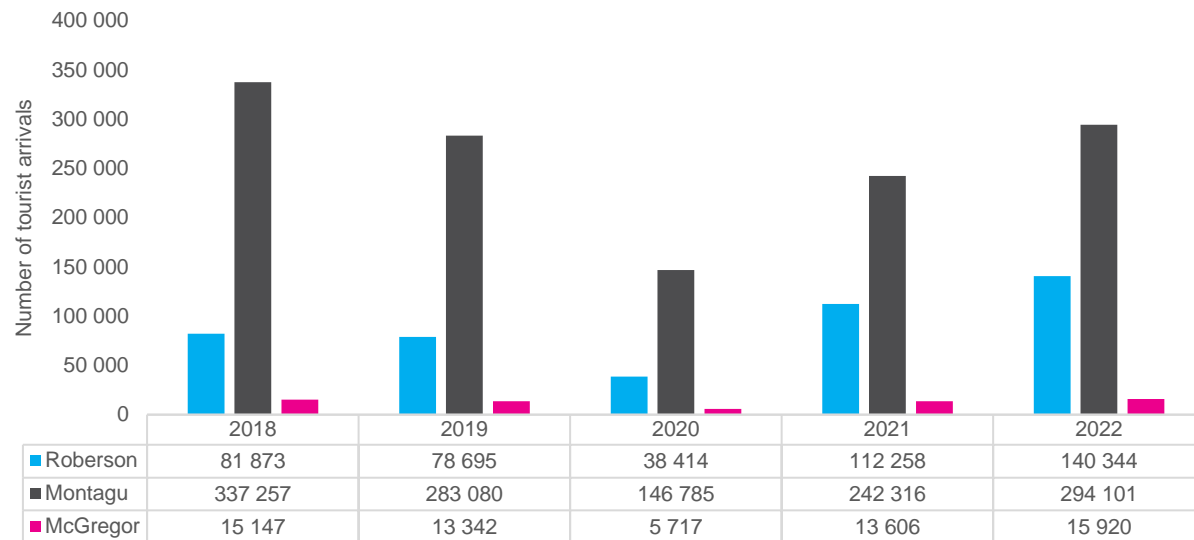|	2018	2019	2020	2021	2022
McGregor	15 147	13 342	5 717	13 606	15 920
Y-O-Y % Change		-11,9%	-57,2%	138,0%	17,0%

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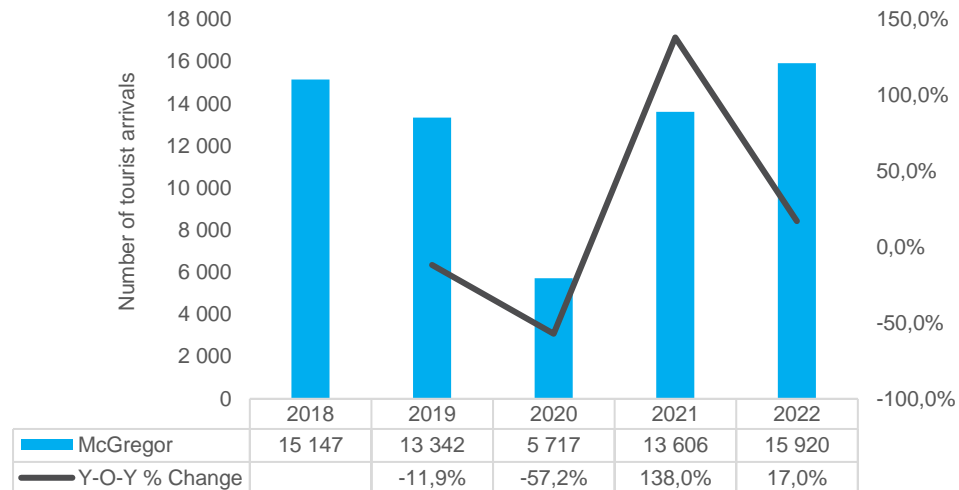
4.   Langeberg Attractions

- Close to 60 000 people visited attractions in the Langeberg area in 2022,as compared to the 53 716 visitors in 2021. This demonstrates a steady growth in comparison to the Covid-19 pandemic period.

- When individually analysed Viljoensdrift River Cruise had the highest arrivals with 18 212 recorded in 2022. This represents a 17.5% YOY growth, Avalon Springs attracted the second largest number of visitors (10 135), followed by Birds Paradise (8 035).
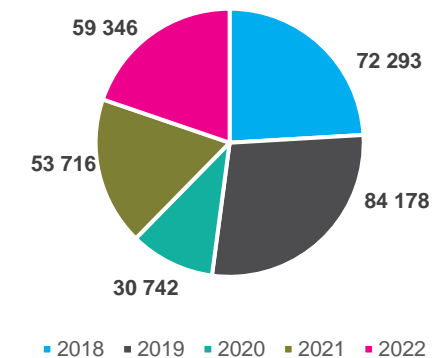
- A positive YOY % growth in numbers of visitors could be observed at several other attractions, including (Eseltjiesrus Donkey Sanctuary: 91.4%) (Flying feet: 70.0%) and (Nerina Guest Farm: 49.9%).

	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22
Birds Paradise	640	478	788	790	382	550	839	576	437	849	429	1 277
Viljoensdrift River Cruise	2 212	180	2 008	1 926	918	822	822	1 138	1 045	1 877	1 547	3 717
Protea Tractor Trips	381	331	445	574	574	451	485	216	216	712	494	1 095
Montagu Museum	Closed	Closed	Closed	Closed	Closed	Closed	Closed	Closed	Closed	Closed	Closed	Closed
Avalon Springs Day Visitors	5 803	2 563	1 769	0	0	0	0	0	0	0	0	0
Wahnfried	137	153	141	222	128	113	182	196	245	251	302	325
Temenos	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Lords Wines	398	528	690	659	638	426	512	478	427	516	564	237
Nerina Guest Farm	48	92	101	443	13	4	4	0	16	16	47	177
Flying Feet	120	71	115	116	96	49	131	110	48	101	51	262
Eseltjiesrus Donkey Sanctuuary	209	215	659	683	531	639	911	478	189	192	215	428
Montagu Guano Caves	0	0	0	127	73	105	0	0	96	157	264	120

	Total 2021	Total 2022	21/22 Y-O-Y % Change
Birds Paradise	9 207	8 035	-12,7%
Viljoensdrift River Cruise	15 494	18 212	17,5%
Protea Tractor Trips	4 548	5 974	31,4%
Montagu Museum	Closed	Closed	-
Avalon Springs Day Visitors	12 652	10 135	-19,9%
Wahnfried	1 665	2 395	43,8%
Temenos	-	-	-
Lords Wines	5 968	6 073	1,8%
Nerina Guest Farm	641	961	49,9%
Flying Feet	747	1 270	70,0%
Eseltjiesrus Donkey Sanctuuary	2 794	5 349	91,4%
Montagu Guano Caves	-	942	-

Total Visitors to Langberg Attractions, 2018 -2022

59 346
72 293
53 716
84 178
30 742

■ 2018 ■ 2019 ■ 2020 ■ 2021 ■ 2022

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Stellenbosch Wine Valley Route

Mobile Location Data Insights

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5. Winelands Mobile Location Data Insights

- What is mobile location data?

  - This is geo or spatial data from smartphones. When a user installs an app, they are often asked to share their location data with the company which provides the app, and other companies who are partners with the app publisher.

  - Users can opt into location sharing (or choose not to opt in). When they opt in, then their phone collects data and shares this with the companies who publish the apps.

  - All data collected is anonymised and does not include any personally identifiable information.

- Why use mobile location data insights?

  - Mobile location-based data offers a more granular lens on visitor behaviour and provides a much larger sample size.

  - These insights aim to facilitate a better understanding of visitor movement throughout the Western Cape's six regions.

  - Mobile location data serves as a sample. The data is not representative of 100% of visitors, and it should not be treated as such. Like any sampling method, it can be subject to biases or lack of volume.
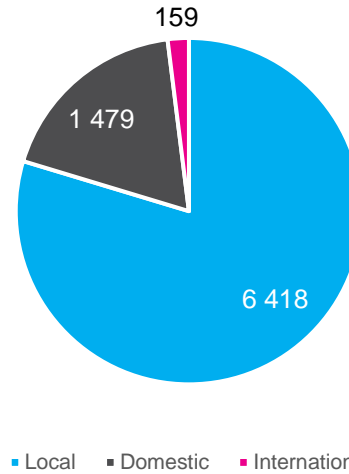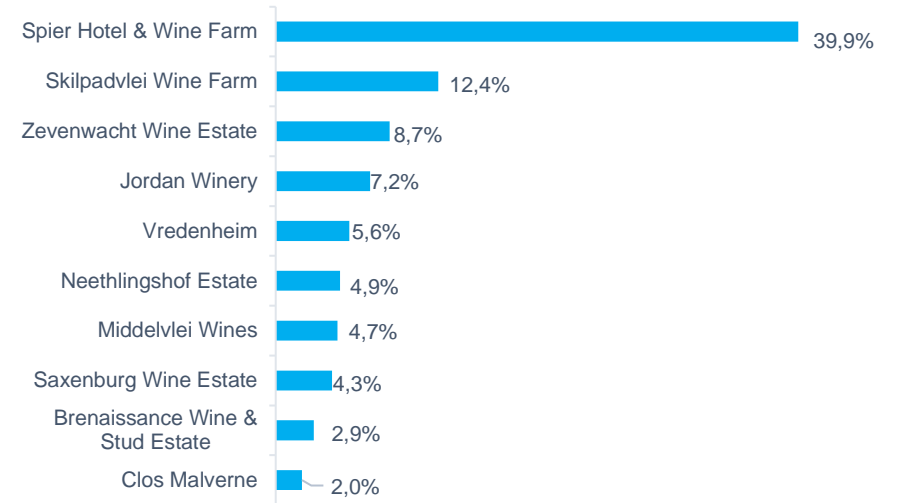
5. Stellenbosch Wine Valley Route

- From a sample size of **8 056 tourists** who visited the Stellenbosch Wine Route, 6 418 were locals, 1 479 were domestic visitors and 159 were international.

- Spier Hotel and Wine Farm was the most visited farm on the route, followed by Skilpadvlei and Zevenwacht Wine Estate.

- With respect to the average hours spent at the Wine Estates, De Toren Private Cellar (4.0 hours) reflected the longest dwell time from January to December 2022.
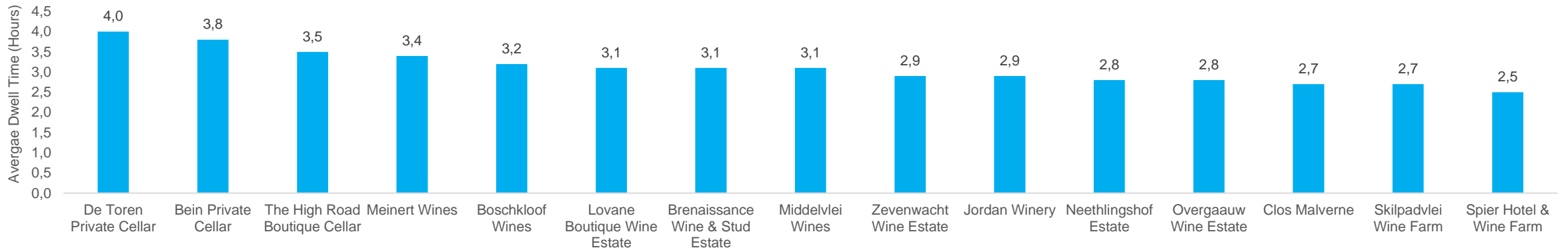
Sample Size: Visitors to Stellenbosch Wine Valley (2022)

159
1 479
6 418

■ Local ■ Domestic ■ International

Stellenbosch Wine Valley Route: Top 10 POI's Visited, 2022

POI	%
Spier Hotel & Wine Farm	39,9%
Skilpadvlei Wine Farm	12,4%
Zevenwacht Wine Estate	8,7%
Jordan Winery	7,2%
Vredenheim	5,6%
Neethlingshof Estate	4,9%
Middelvlei Wines	4,7%
Saxenburg Wine Estate	4,3%
Brenaissance Wine & Stud Estate	2,9%
Clos Malverne	2,0%

Stellenbosch Wine Valley Route: Average Hours Spent at POI's (2022)

POI	Average Dwell Time (Hours)
De Toren Private Cellar	4,0
Bein Private Cellar	3,8
The High Road Boutique Cellar	3,5
Meinert Wines	3,4
Boschkloof Wines	3,2
Lovane Boutique Wine Estate	3,1
Brenaissance Wine & Stud Estate	3,1
Middelvlei Wines	3,1
Zevenwacht Wine Estate	2,9
Jordan Winery	2,9
Neethlingshof Estate	2,8
Overgaauw Wine Estate	2,8
Clos Malverne	2,7
Skilpadvlei Wine Farm	2,7
Spier Hotel & Wine Farm	2,5

Source: Rove, 2023

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Mobile Tourists and Non-Tourists Definitions

- About Mobile Location Data
  - Privacy compliant data is collected from location enabled apps on mobile devices. Data collected when those location enabled mobile devices entered our geo fenced area
  - Data is collected through applications (news, weather, games, texting apps, traffic, etc)
    - Year over year numbers could be skewed by increase app penetration and data privacy settings/policies.
    - Exception with China which does not share data…
  - Think of mobile data like survey data on steroids.
    - A sample size greater than 30 yields a 95% level of confidence.
    - This may be the largest sample size of data pertaining to visitors•
  - Should not be compared to visitation data.•
  - Many factors impact total sample size
    - Number of app partnerships
    - Usage of apps
    - App developer policies
    - Volume of visitors

- Who Are Tourists vs Non-Tourists?
  - A Tourist is typically defined as follows:
    - The visitor does not live or work within the study geography
    - The visitor travels a minimum distance to the study geography
    - The visitor appears in the study geography for a minimum period of time (exclude commuters/passers through etc.)

Source: Rove, 2023

Mobile Tourists and Non-Tourists Definitions

Primary Study Geography	Tourists are defined as:
Province/Tourism Regions	When a visitor does not live or work in Cape Town, Cape Winelands, Cape Overberg, Weskus, Garden Route & Klein Karoo and Cape Karoo and they have traveled more than 25 miles (40km) and they have stayed in the polygon for more than 120 minutes, they are a tourist.

Notes and Considerations:
- Residents of the Western Cape are not counted as a tourists
- Minimum distance traveled to meet the definition of tourist. Distance travelled is calculated from the visitors Common Evening Location (latitude and longitude) to the center of the polygon

Secondary Study Geography	Tourists are defined as:
City or Town	When a visitor does not live or work in the City or Town and they have traveled more than 25 miles (40km), and they have stayed for more than 45 minutes, they are a tourist.

Notes and Considerations:
- Residents of a city are not counted as a tourist of the city
- Minimum distance traveled of 40km satisfies tourist definition for minimum distance traveled. Distance travelled is calculated from the visitors Common Evening Location (latitude and longitude) to the center of the polygon

Point of Interest Study Geography	Tourists are defined as:
All Tourism Experiences	When a visitor stays in the polygon for more than 15 minutes and has not visited the polygon more than 20 times in any 90 day period, they are a tourist

Notes and Considerations:
- Any 90 day period refers to any consecutive 90 days in their mobile location data history
- Filter out visitors not staying for any meaningful length of time (couriers, taxis etc.).
- Filter out people who work at the Tourism Experience.

What are Tourist Segments?

- **Local Tourists:** Tourists who reside within the same Region.
- **Domestic Tourists:** Tourists who reside in South Africa outside of Western Cape
- **International Tourists:** Tourists who reside outside of South Africa

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Source: Rove, 2023

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Glossary of Key Terms

Term	Definition and Usage
Study Geography	A specific geography, defined by a boundary called a polygon.
Primary Study Geography	The largest area in the destination in which you want to capture mobile device data. For most destinations this is usually a country, province, or state.
Secondary Study Geography	Often destinations want to derive insights about sub-geographies within their destination, such as counties, tourism regions, an d city regions.
Point of Interest	Points of interest are the smallest study geographies in your destination such as tourism businesses, parks, roadways, or city d istricts.
Sample	Not all people carry GPS enabled, opted in mobile devices with location services always activated. Thus, in any period of time , in any given study geography, mobile location data is a sample. Therefore, whenever this whitepaper discusses "visitors" or "tourists" or "residents" or any other grouping of devices, it should always be understood to be a sampling of real world visitor ship or foot traffic.
Visitors	Mobile devices seen within the study geography during a specific period of time
Common Evening Location (CEL)	Derived latitude-longitude point near which a device spends most of its time on evenings and/or weekends. While most often associated with a device's home, there is nothing that inherently guarantees that it is a home (e.g. a person who works an overnight shift at a power plant).
Common Daytime Location (CDL)	Derived latitude-longitude point near which a device spends most of its traditional workweek [Monday Friday, 8am 6pm local time] time]. While most often associated with a device's office or work location, there is nothing that inherently guarantees that it is an office or work location (e.g. a person who is a stay at home parent).
Residents/Workers/Locals	Terms referring to a visitor segment comprising of devices which are determined to have a CEL or a CDL with the study geography or within a certain (usually short) distance of the study geography. For most tourism analyses, these devices are eliminated from the project because they are not, by definition, tourists. However, it is possible to include these devices within a broader visitor study.
Tourists	Term generally referring to a visitor segment comprising of devices which are determined to have NOT have a CEL or a CDL with the study geography or within a certain (usually short) distance of the study geography but have come to the study geography from a different origin market.
Tourist Segments	Groupings of tourist segments which have a defining characteristic associated with their appearance in a study geography, such a s "Short Haul Tourists" or "International Tourists" or "In State Tourists."
Overnighters	Term which characterizes a specific visitor segment where mobile devices are seen in the study geography for more than one consecutive day. An overnight stay is defined as tourists that arrived prior to midnight (0:00) and stayed until 07:00 the following day.
Day Trippers	Term which characterizes a specific visitor segment where mobile devices are seen in the study geography for less than one day.
Length of Stay	Duration of trip within the study geography. The methodology for calculating length of stay is based on the characteristics of t he geography.

Source: Rove, 2023

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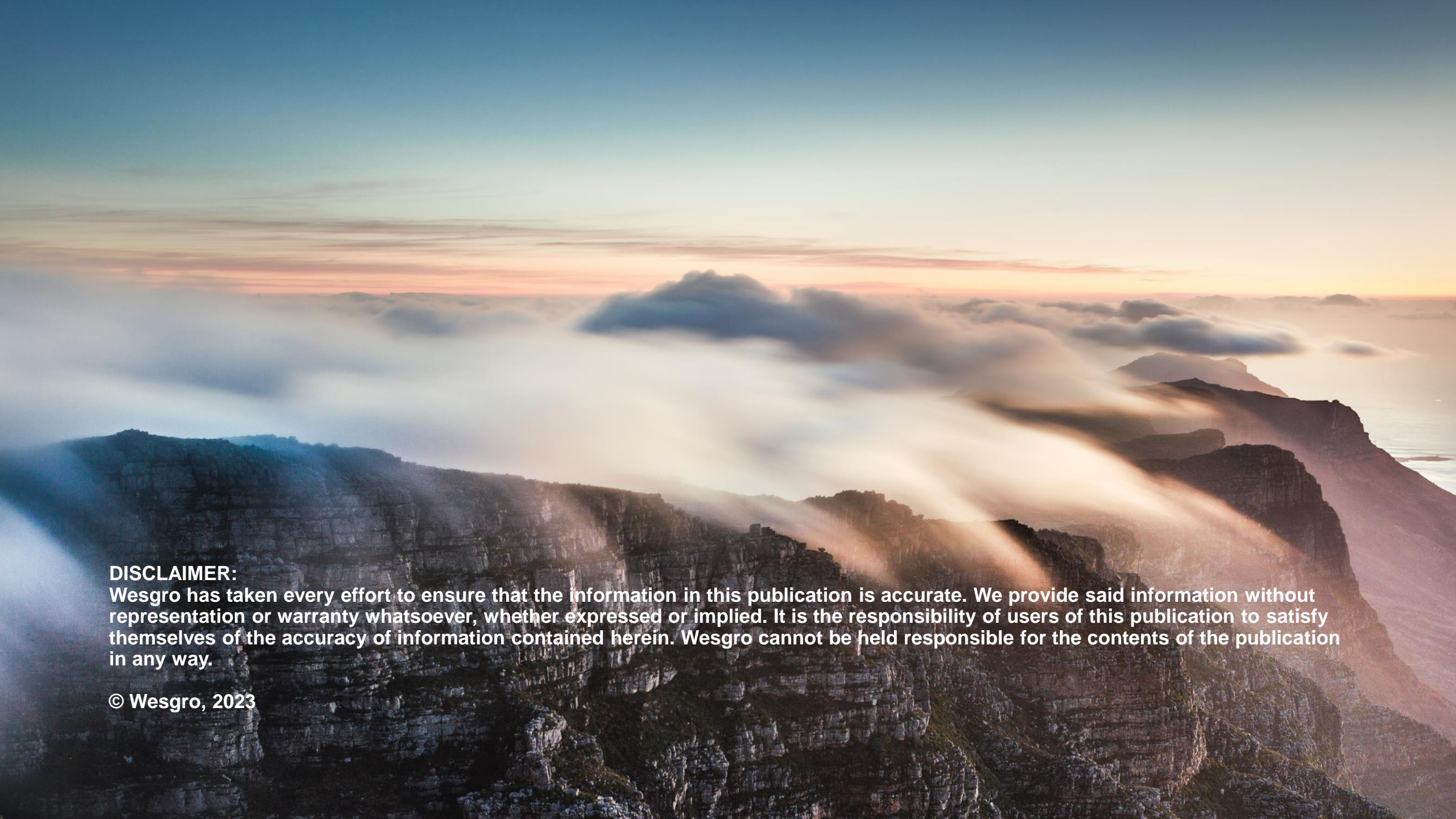
6.   Acknowledgements & Sources

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- Wellington Tourism
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Sources

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