

Winelands

Tourism Trends
January–June 2023



Contents

1. Methodology and Sample Size
2. Winelands Visitor Trends & Patterns
 - Figure 1: Sample Size: International and Domestic Visitors
 - Figure 2: Source Markets for International Visitors
 - Figure 3: Origin of Domestic Visitors to the Winelands
 - Figure 4: Age Profile of Visitors
 - Figure 5: Travel Group Size
 - Figure 6: Mode of Transport
 - Figure 7: Purpose of Visit
 - Figure 8: Top Information Sources
 - Figure 9: Top Activities Enjoyed in the Winelands
 - Figure 10: Overnight Stays
 - Figure 11: Average Length of Stay
 - Figure 12: Accommodation Usage
 - Figure 13: Average Daily Spend
 - Figure 14: Average Spend on Accommodation
3. Langeberg Visitors & Attractions
4. Insights from Mobile Location Data
5. Stellenbosch Wine Valley Route
6. Acknowledgements & sources

Visitor Trends in the Winelands

Wesgro Primary Research: Regional Visitor Tracking
Surveys

1. 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 surveys.

Responses to the regional visitor tracking surveys are used as a proxy to indicate the key trends in 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 represent a sample of the visitors to different tourism offices across the Western Cape. 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 June 2023, a total of **822** responses to the regional visitor tracking surveys were received from the respective tourism offices in the Winelands.



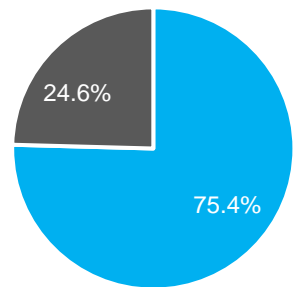
Town	Number of Surveys
Ceres	448
Paarl	47
Tulbagh	327
Total Surveys	822



2. Visitor Trends & Patterns in the Winelands

- The domestic market accounted for about three-quarters of visitors the region between January and June 2023, and the overseas market accounted for 24.6%, as seen in Figure 1.
- Figure 2 shows that the United Kingdom, which accounted for 28.2% of the international visitors to the Winelands, continues to rank as the region’s top international source market for tourists. This was followed by Germany (27.7%) and the Netherlands (16.8%), as has been the case for the past few years.
- Figure 3 illustrates that more than four-fifths of domestic travellers to the region came from within the Western Cape. This confirms that the Cape Winelands is a popular tourism destination among locals. Gauteng accounted for 7.9% of domestic visitors to the region, while 1.5% of domestic travellers were from the Free State.

Figure 1: % Share of International and domestic visitors to the Winelands (Jan-Jun 2023)



■ Domestic ■ International

Figure 2: Top 10 Source Markets for International Visitors to the Winelands (Jan-Jun 2023)

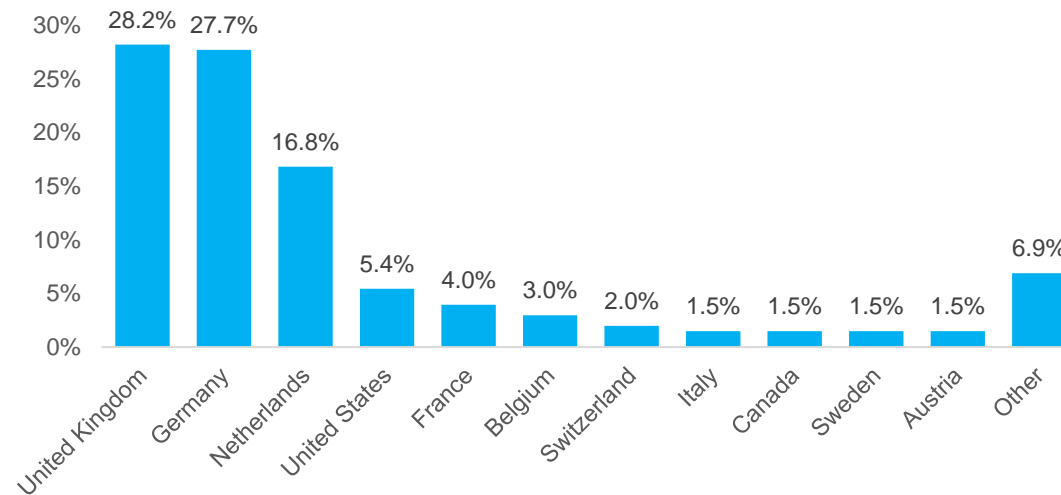
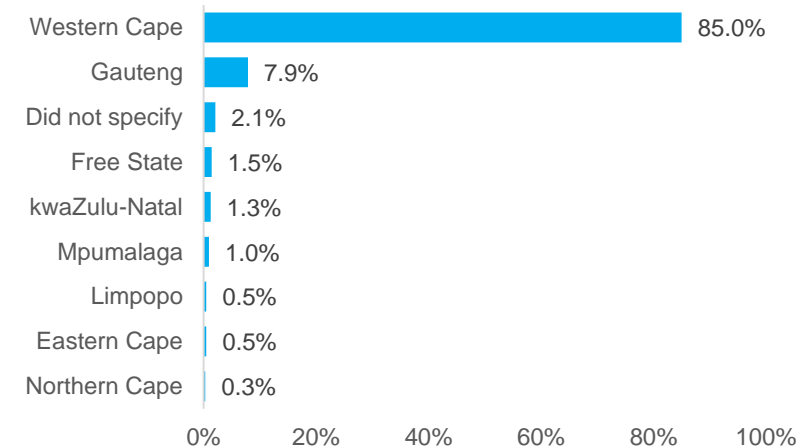
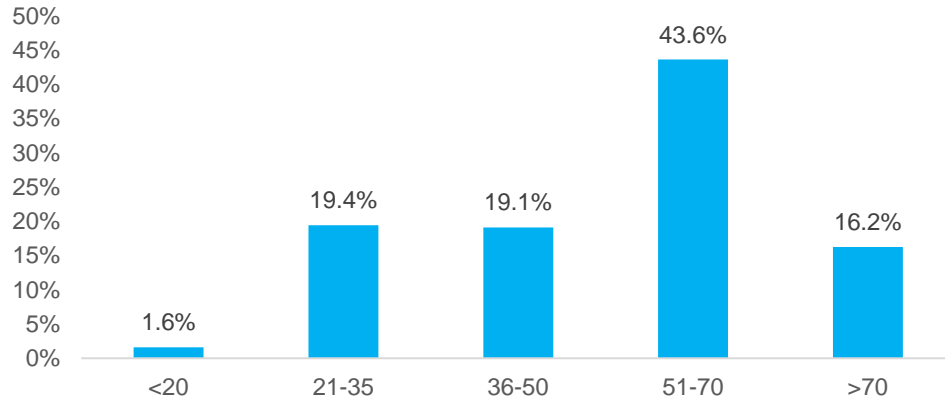


Figure 3: Origin of Domestic Visitors to the Winelands (Jan-Jun, 2023)



3. Visitor Trends & Patterns in the Winelands

Figure 4: Age Profile of Visitors



- Over two-fifths of visitors to the Winelands were adults aged between 51 and 70 years. This was followed by young adults aged 21–35 years at 19.4%, as seen in Figure 4.
- Figure 5 shows that 62.3% of visitors travelled to the region in pairs. This was followed by those travelling in groups of three or more, representing a combined share of 29.2%. Only 8.5% of the visitors were solo travellers.
- In Figure 6, it can be seen that more than half of the visitors who travelled to the region preferred using their own motor vehicles, while 45.7% used rented cars.

Figure 5: Travel Group Size

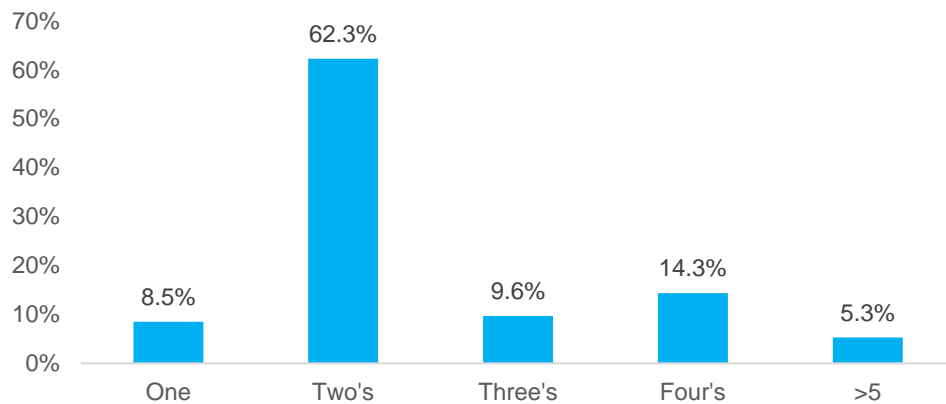
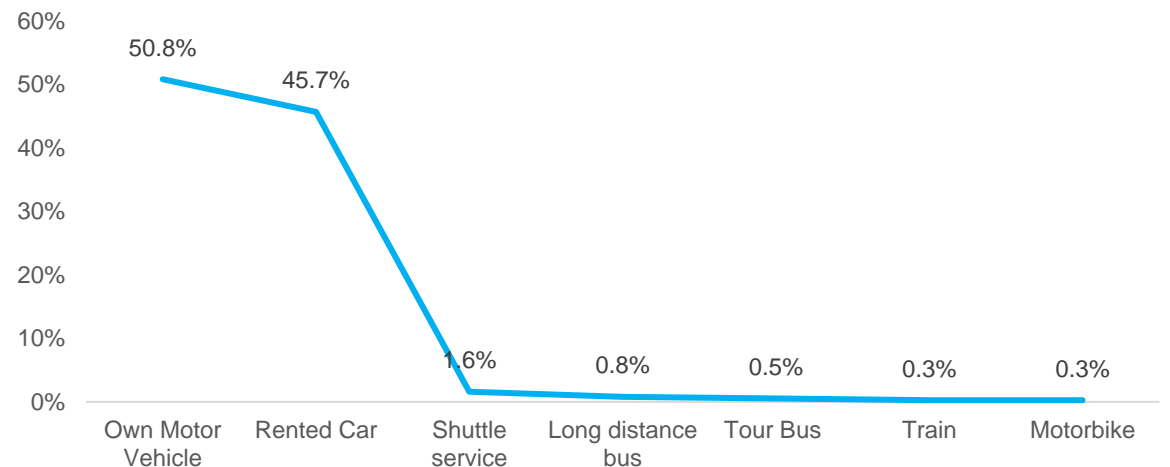
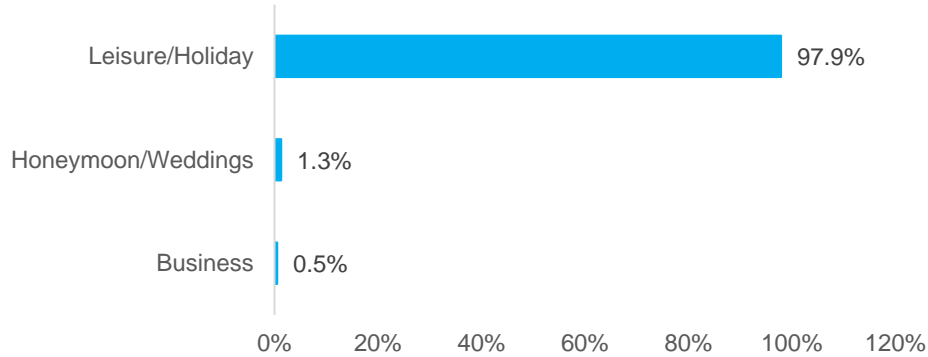


Figure 6: Mode of Transport



3. Visitor Trends & Patterns in the Winelands

Figure 7: Purpose of Visit



- The main motivation for travel to the Winelands was holiday/leisure, with 98% of visitors citing this as the reason for visiting the area. The remaining 2% of visitors cited honeymoon/weddings and business as the reasons for visiting the Winelands. This can be seen in Figure 7.

- Figure 8 shows that the top three information sources, which played a major role in drawing visitors to the region and various attractions, were the internet/websites (37.3%), return visitors (24.2%) and word of mouth (17.1%).

- Figure 9 gives information about the top activities enjoyed in the region. Some 29.8% of visitors enjoyed experiences relating to the culture and heritage of the Winelands. A share of 18.3% participated in outdoor activities, and 16.5% went on scenic drives.

Figure 8: Top Information Sources

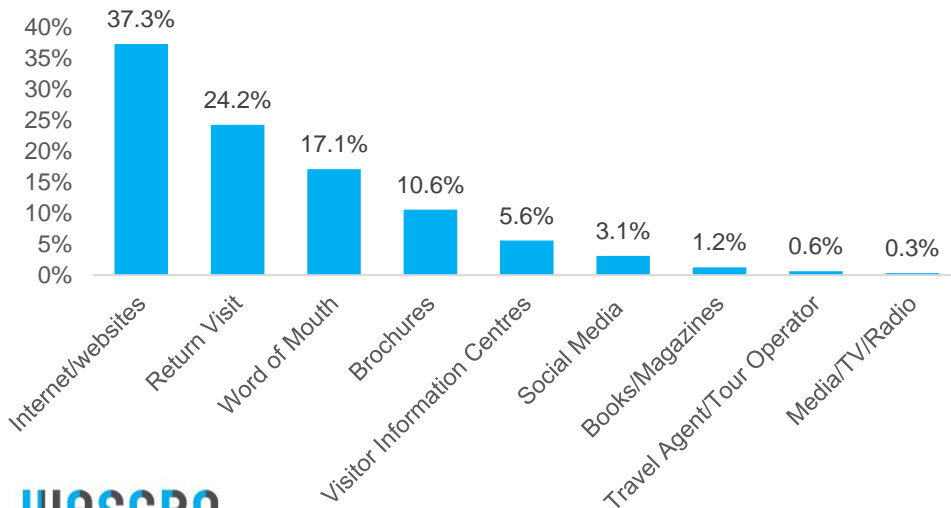
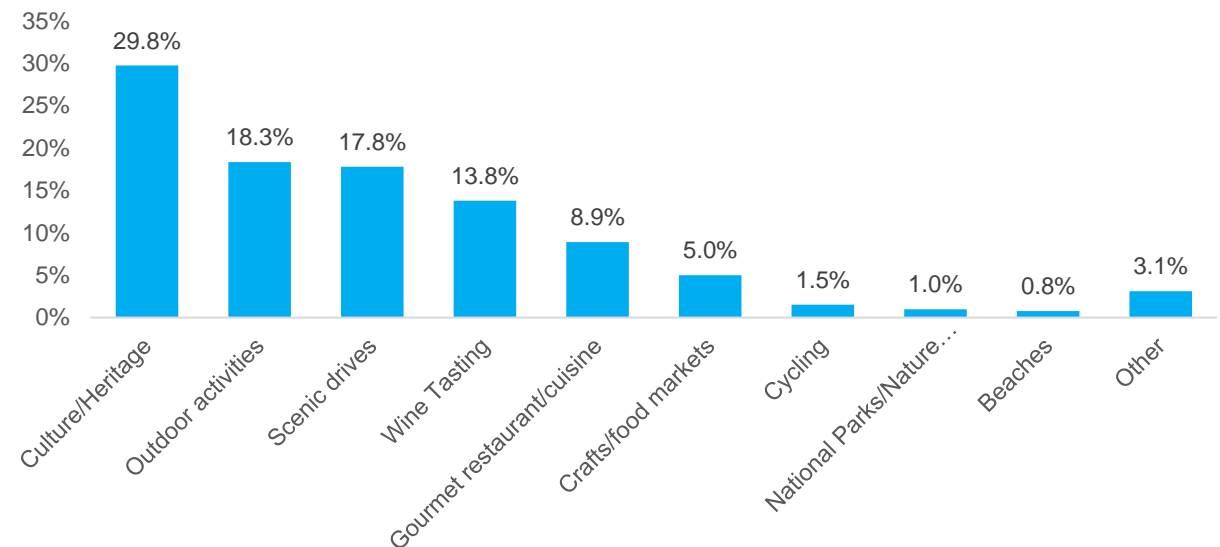
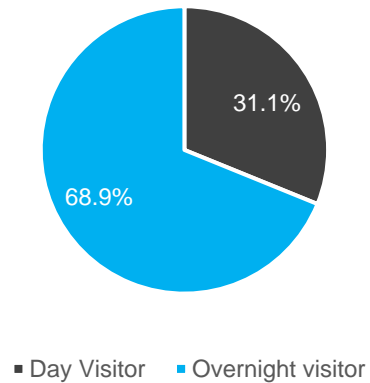


Figure 9: Top Activities Enjoyed in the Cape Winelands



3. Visitor Trends & Patterns in the Winelands

Figure 10: Overnight Stays



- Figure 10 shows that close to 70% of respondents indicated that they had stayed overnight in the region, while 31.1% were day visitors. Relaxation, scenery, and socialising with friends and family were some of the most common reasons for day visitors travelling to the Winelands.
- Looking at the average length of stay of visitors to the Winelands, approximately 50% of travellers stayed for two nights, while 23% stayed for three nights as shown in Figure 11.
- About 28.3% of respondents indicated that their preferred accommodation type was self-catering establishments, followed by hotels (26.0%) and guest houses (21.3%). This can be seen in Figure 12.

Figure 11: Average Length of Stay

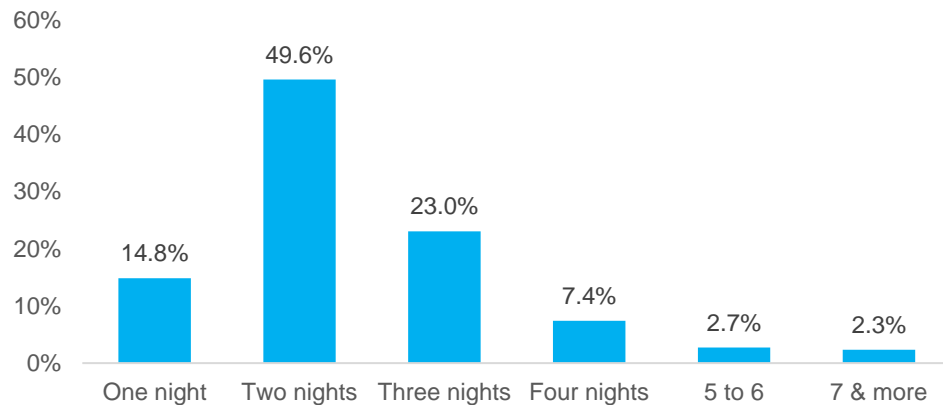
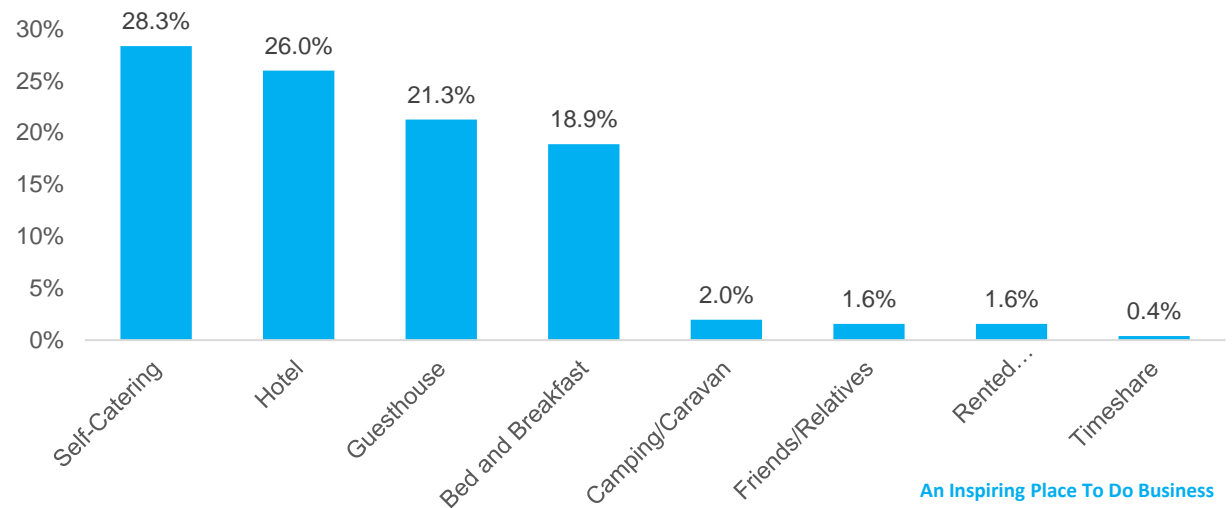
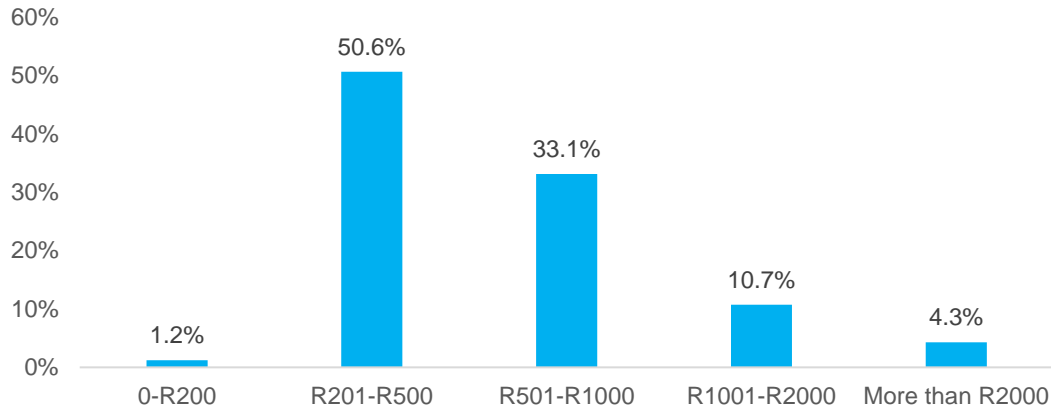


Figure 12: Accommodation Usage



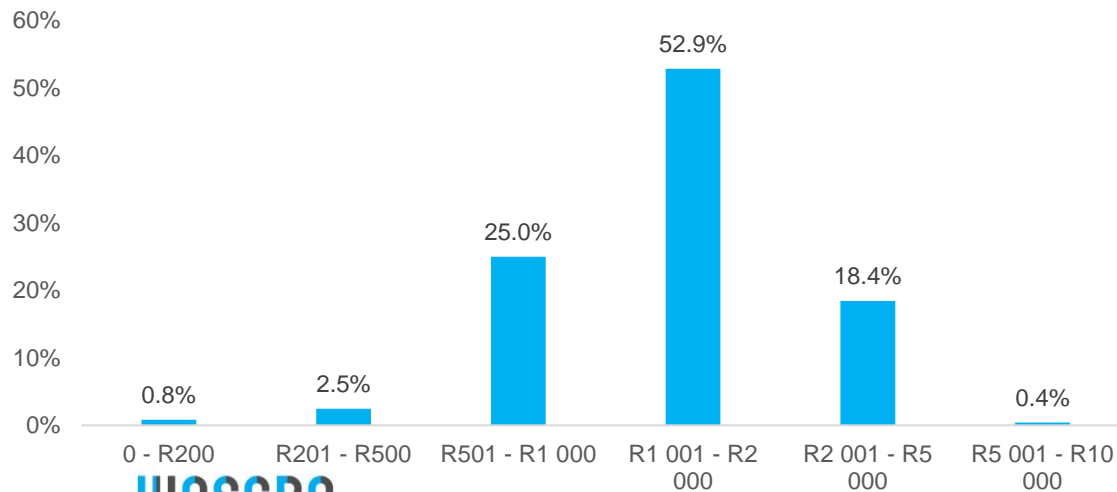
3. Winelands Visitor Trends & Patterns

Figure 13: Average Daily Spend



- Figure 13 shows that over 50% of visitors to the Winelands spent between R201 and R500 per day in the region, while 33.1% and 10.7% indicated an average daily spend of R501–R1 000 and R1 001–R2 000, respectively.
- Regarding how much they spent on accommodation, 52.9% of visitors spent between R1001–R2000, whereas 25% indicated that their expenses were R501–R1000 per day, as shown in Figure 14.
- Visitors to the Winelands can be classified as medium spenders. This is based on the visitors average daily spend and how much they spent on average on accommodation.

Figure 14: Average Spend on Accommodation



Langeberg Visitors & Attractions

WESGRO

cape town & western cape
tourism, trade, investment, film

An Inspiring Place To Do Business

3. Langeberg Visitor Trends

- The Langeberg Local Municipality falls within the Cape Winelands District Municipality in the Western Cape Province. The region is bordered by the Breede Valley Municipality to the north and west and by the Overberg District to the south and east.
- More than **236,000** people visited the Langeberg region between January and June 2023, a year-over-year (y-o-y)% change of 11% when compared to the same period in 2022. This can be seen in Figure 16.
- The town of Montagu attracted the most visitors from January 2018 to June 2023, with a total of **747,885** arrivals.

Figure 15: Tourist Arrivals in (Robertson, Montagu & McGregor) Jan–Jun (2018-2023)

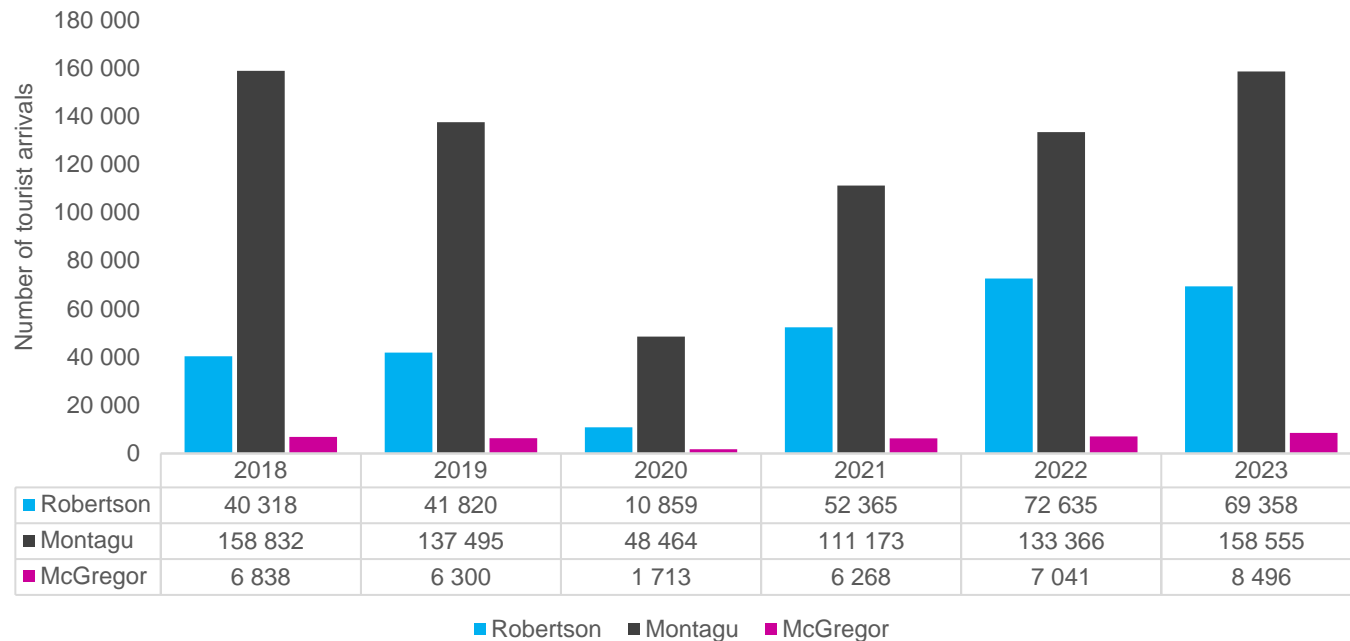


Figure 16: Total Tourist Arrivals in Langeberg Jan–Jun (2018-2023)

	2018	2019	2020	2021	2022	2023
TOTAL	205 988	185 615	61 036	169 806	213 042	236 409
Y-O-Y % Change		-10%	-67%	178%	25%	11%
19/23 Recovery						127%

3. Langeberg Visitor Trends

- The following graphs show the visitor numbers per town for the Langeberg area between January and June of 2018 to 2023. As seen in Figure 17, Montagu received the most visitors during the Jan—Jun period in 2023, followed by Robertson and McGregor (Figures 18 and 19), with all three towns showing a positive y-o-y % growth when compared to the same period in 2022.

Figure 17: Montagu Tourist Arrivals, 2018 - 2023

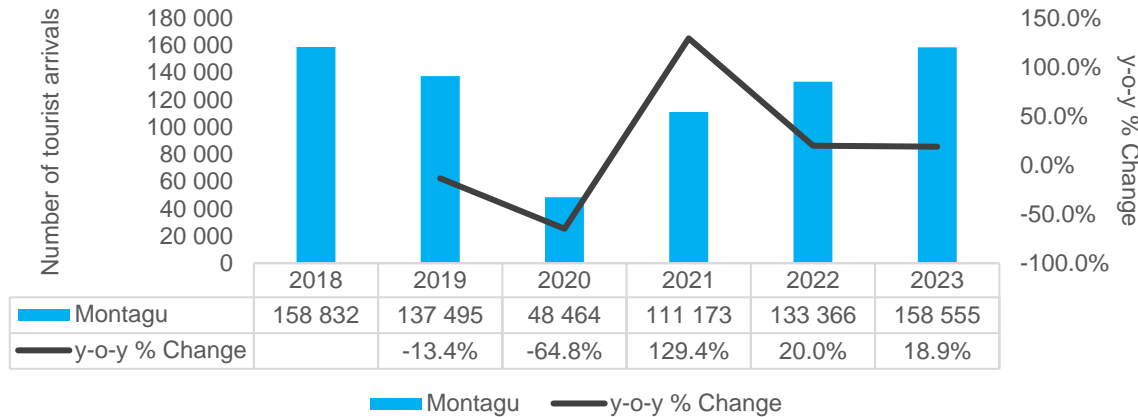
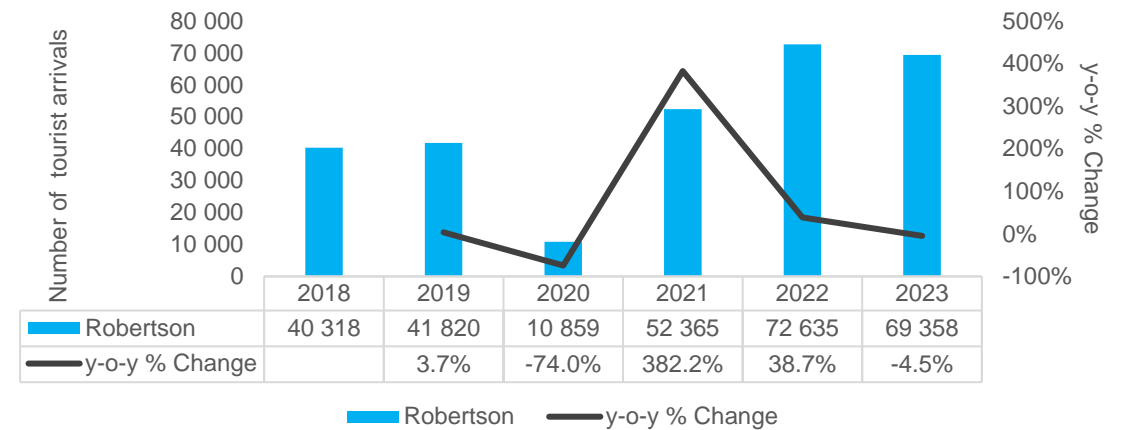
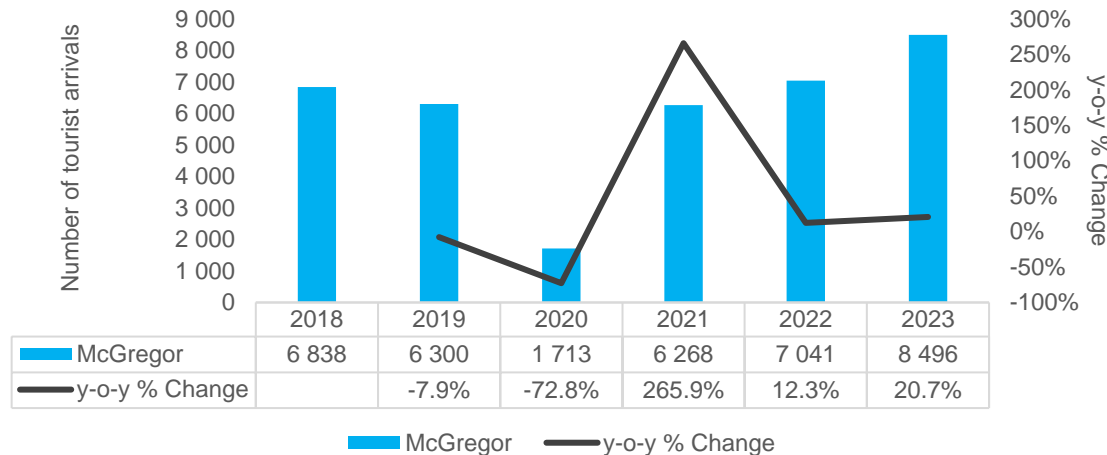


Figure 18: Robertson Tourist Arrivals, 2018 - 2023



McGregor Tourist Arrivals, 2018 - 2023



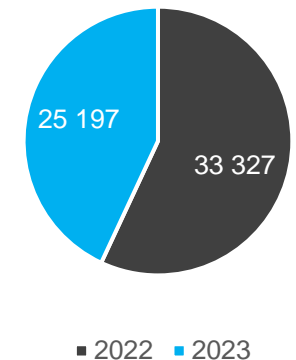
3. Langeberg Attractions

- Figure 20 shows the total number of **25,197** visitors to attractions in the Langeberg area between January and June 2022, as opposed to the same period in 2023, when **33,327** people visited the area. The numbers demonstrate a positive and steady growth in visitors to the area.
- Looking at individual attractions in the Langeberg area, as shown in Table 1, Avalon Springs (with a total of **4,373** visitors) attracted the most visitors from January to June 2023. This was followed by Birds Paradise (**3,908** visitors) and Lords Wines (**2,144** visitors). Table 2 shows that the Montagu Guano Caves had the highest y-o-y% increase, with a 268.9% growth in arrivals when compared to the same period in 2022. A positive y-o-y % growth in the number of visitors could be observed at several other attractions, including Birds Paradise (7.7%) and Flying Feet (2.7%).

	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23
Birds Paradise	926	434	850	921	377	400
Viljoensdrift River Cruise	1 329	1 434	1 785	2 052	722	49
Protea Tractor Trips	347	209	442	539	218	218
Avalon Springs Day Visitors	0	0	910	1 496	1 197	770
Wahnfried	213	115	151	136	93	210
Lords Wines	245	259	247	607	370	416
Nerina Guest Farm	48	30	69	22	39	0
Flying Feet	100	63	90	100	50	10
Eseljtjesrus Donkey Sanctuary	539	325	527	581	143	649
Montagu Guano Caves	650	475	0	0	0	0

	Total Jan - Jun 2022	Total Jan - Jun 2023	Y-O-Y % Change (Jan - Jun 22/23)
Birds Paradise	3 628	3 908	7.7%
Viljoensdrift River Cruise	8 066	7 371	-8.6%
Protea Tractor Trips	2 756	1 973	-28.4%
Avalon Springs Day Visitors	10 135	4 373	-56.9%
Wahnfried	894	918	2.7%
Lords Wines	3 339	2 144	-35.8%
Nerina Guest Farm	701	208	-70.3%
Flying Feet	567	413	-27.2%
Eseljtjesrus Donkey Sanctuary	2 936	2 764	-5.9%
Montagu Guano Caves	305	1 125	268.9%

Figure 20: Total Visitors to Langeberg Attractions Jan–Jun (2022 and 2023)



Stellenbosch Wine Valley Route

Mobile Location Data Insights

WESGRO

cape town & western cape
tourism, trade, investment, film

An Inspiring Place To Do Business

4. Insights from Winelands Mobile Location Data

- The analysis in subsequent sections utilises mobile location data.
- 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

- The insights in this section make use of mobile location data from a sample of **4,721 tourists** who visited the Stellenbosch Wine Valley Route between January and June 2023, **61** were locals, **4,016** were domestic visitors and **644** were international visitors, as illustrated in Figure 21.
- Figure 22 shows that Spier Hotel and Wine Farm was the most visited farm on the route, followed by Skilpadvlei Wine Farm and Zevenwacht Wine Estate.
- With respect to the average hours spent at the wine farms or estates, visitors spent the longest time (3.1 hours) at Brenaissance Wine and Stud Estate. This can be observed in Figure 23.

Figure 21: Number of Visitors to Stellenbosch Wine Valley Jan–Jun 2023

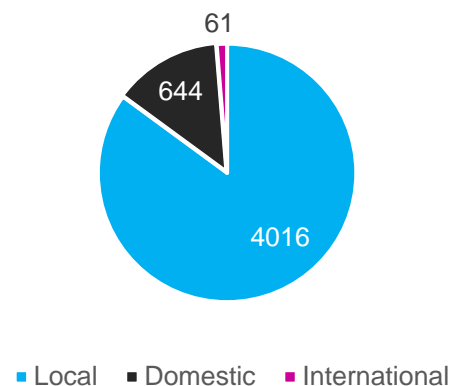


Figure 22: Top 10 Point of Interest (POIs) Visited Jan - Jun 2023

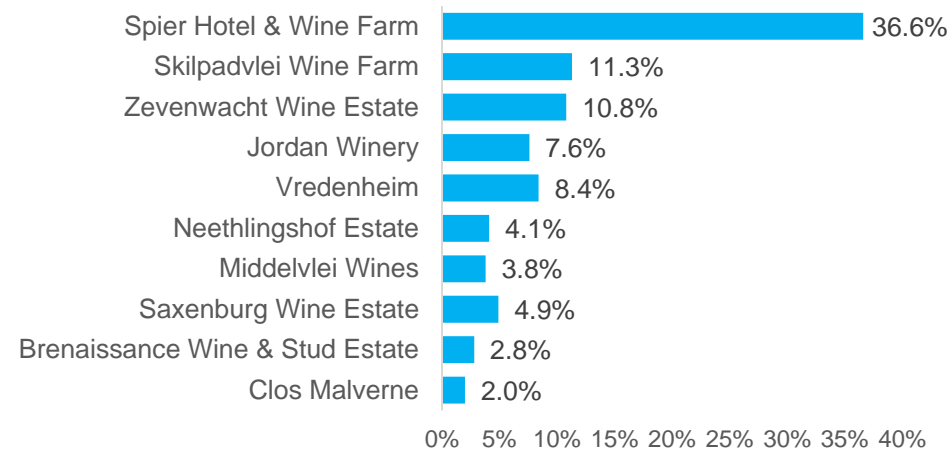
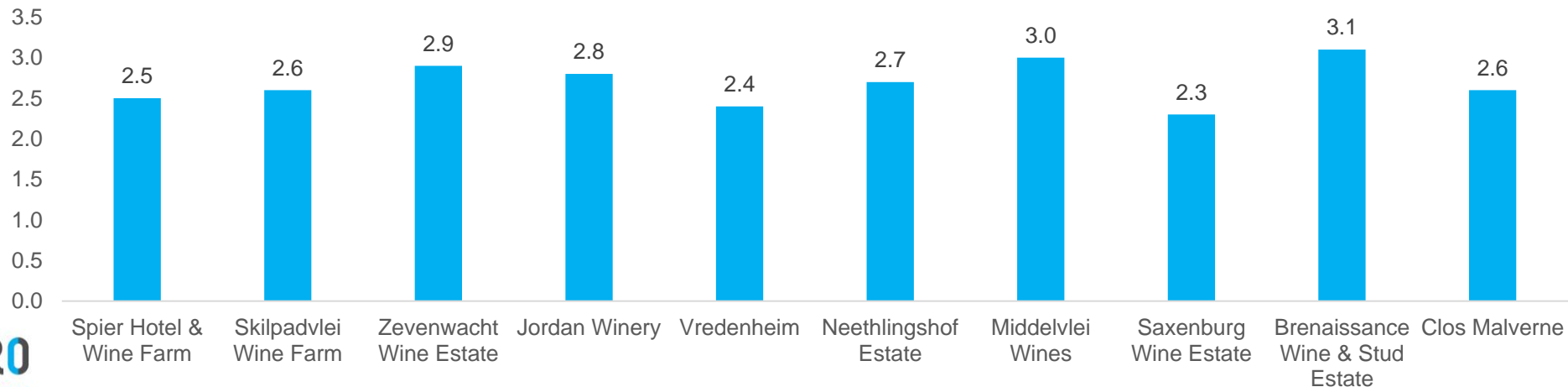


Figure 23: Average Hours Spent at Points of Interest (POIs) Jan–Jun 2023



Definitions of Mobile Location Data and Tourists vs non-Tourists

- About Mobile Location Data

- Privacy compliant data is collected from location-enabled apps on mobile devices. Data is collected when those location-enabled mobile devices enter our geo-fenced areas.
- Data is collected through applications (news, weather, games, texting apps, traffic, etc).
 - Year-over-year numbers could be skewed by increased app penetration and data privacy settings/policies.
 - The exception is 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•
- This 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?

- A tourist is typically defined as follows:
 - A visitor who does not live or work within the study geography
 - A visitor who travels a minimum distance to the study geography
 - A The visitor who appears in the study geography for a minimum period of time (exclude commuters/passers through, etc.)

Source: Rove, 2023

Definitions of Mobile Location Data and Tourists vs non-Tourists

Primary Study Geography		Tourists are defined as:
Province/Tourism Regions	When a visitor does not live or work in Cape Town, Winelands, Cape Overberg, Weskus, Garden Route & Klein Karoo and Cape Karoo and they have travelled more than 25 miles (40km), and they have stayed in the polygon for more than 120 minutes, they are a tourist.	
Notes and Considerations: <ul style="list-style-type: none"> Residents of the Western Cape are not counted as a tourists Minimum distance travelled to meet the definition of tourist. Distance travelled is calculated from the visitors' Common Evening Location (latitude and longitude) to the centre of the polygon Minimum duration of visit of 120 minutes excludes commuters driving through each region 		
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 travelled more than 25 miles (40km), and they have stayed for more than 45 minutes, they are a tourist.	
Notes and Considerations: <ul style="list-style-type: none"> Residents of a city are not counted as tourists to the city Minimum distance traveled of 40km satisfies tourist definition for minimum distance travelled. Distance travelled is calculated from the visitors' Common Evening Location (latitude and longitude) to the centre 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: <ul style="list-style-type: none"> 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.). 		
What are Tourist Segments?		
<ul style="list-style-type: none"> Local Tourists: Tourists who reside within the same region. Domestic Tourists: Tourists who reside in South Africa outside of the Western Cape International Tourists: Tourists who reside outside of South Africa 		

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, and city regions.
Point of Interest	Points of interest are the smallest study geographies in your destination such as tourism businesses, parks, roadways, or city districts.
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 visitorship 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 to Friday, 8am to 6pm local 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 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 devices which are determined NOT to 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 as “Short Haul Tourists” or “International Tourists” or “In State Tourists.”
Overnighters	Term which characterises 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 who arrived prior to midnight (0:00) and stayed until 07:00 the following day.
Day Trippers	Term which characterises 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 the geography.

6. Acknowledgements & Sources

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
- Langeberg Municipality

Sources

- Rove - Mobile Location Data Insights



DISCLAIMER:

Wesgro has taken every effort to ensure that the information in this publication is accurate. We provide said information without representation or warranty whatsoever, whether expressed or implied. It is the responsibility of users of this publication to satisfy themselves of the accuracy of information contained herein. Wesgro cannot be held responsible for the contents of the publication in any way.

© Wesgro, 2024