

# An Analysis of Wine Tourism in the Western Cape in 2022

Wesgro Research, March 2023



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# Wine Tourism in the Western Cape

Survey Results & Analysis: 2022

**WESGRO**

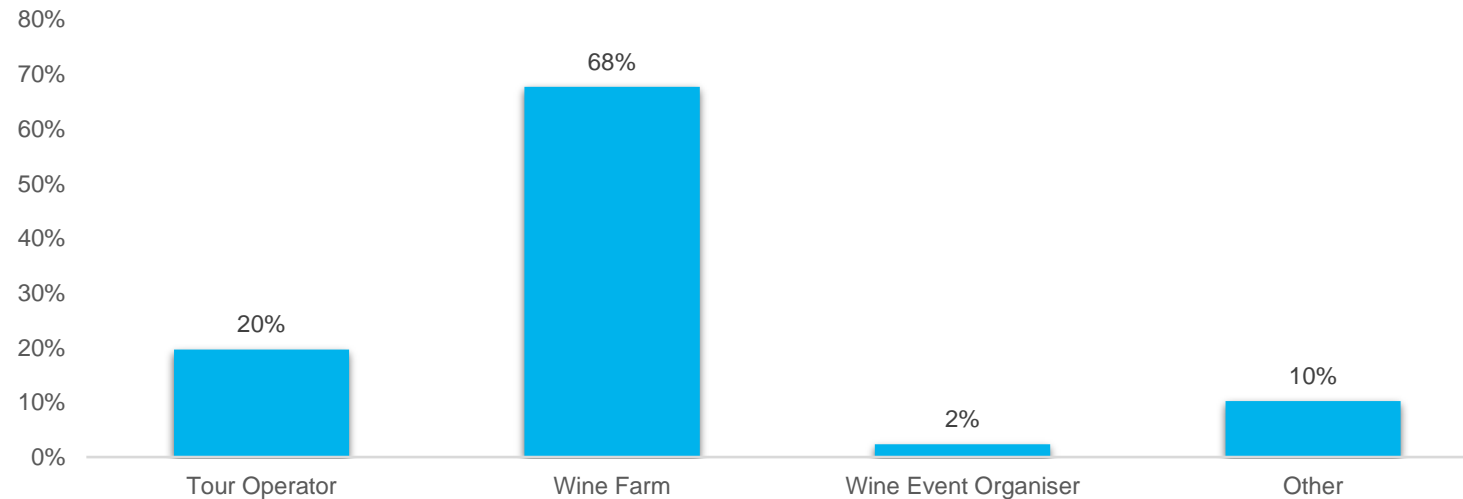
cape town & western cape  
tourism, trade, investment, film

An Inspiring Place To Do Business

# 1. Wine Tourism in the Western Cape

- The objective of the wine tourism survey was to assess wine tourism in the Western Cape in 2022.
- An electronic survey link was circulated among tour operators, wine farms and wine event organisers who were on Wesgro's tourism businesses database. The survey was also shared on social media through LinkedIn.
- A total of 128 responses were received. The primary tool for gathering findings was SurveyMonkey. Some 68% of the representatives were from wine farms, followed by tour operators (20%) and wine event organizers (2%). The remaining 10% were from "other" business types such as guesthouses, wine brands, wine routes and wine producers.
- According to a research paper published by Research Gate (2022), wine, food, tourism and the arts collectively comprise the core elements of the wine tourism product and provide the lifestyle package that wine tourists aspire to and seek to experience.

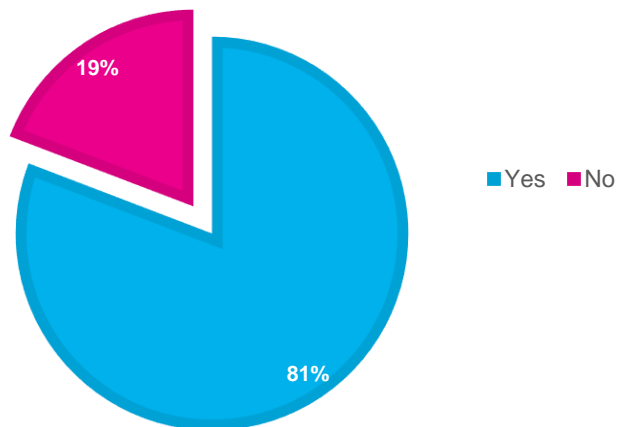
**Figure 1: Sample of respondents according to business type**



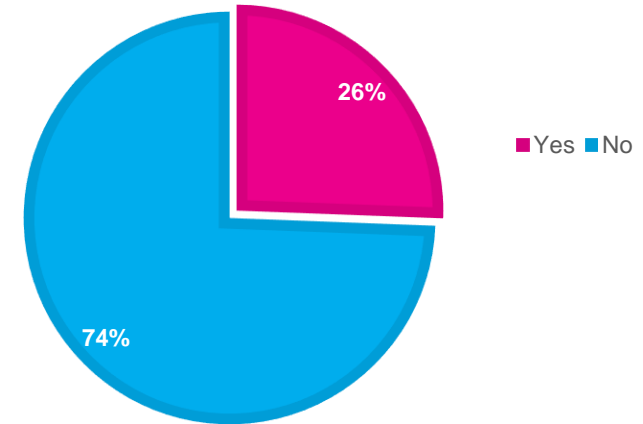
# Wine Tourism in the Western Cape

- Events are key attractions for tourists visiting the various wine routes and regions in the Western Cape. However, only 26% of the survey respondents said they had hosted wine events, while 74% said they had not, as shown in Figure 2 alongside. Examples of wine events include wine tasting events, food and wine pairing, vineyard tours and wine festivals.
- A few specific examples of events hosted by respondents included, the Agulhas Wine Triangle, Soetes & Sop – Breedekloof Festival the Harvest Festival and the Elgin Cool Wine festival.

**Figure 3: Do you think off-peak season wine festivals have a positive impact on the demand for wine tourism?**



**Figure 2: Do you host any wine tourism events?**

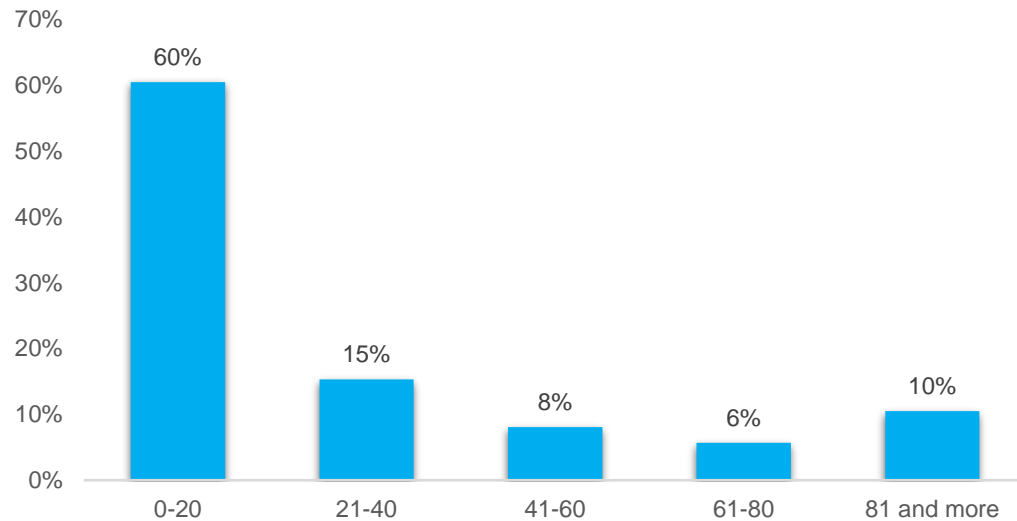


- Figure 3 shows that a high percentage (81%) of businesses experienced an increase in demand for wine tourism from hosting wine festivals during the tourism off-peak season months. Only 19% of respondents indicated there had been no positive impact.
- Respondents also mentioned that off-peak events create out-of-season interest. These events also result in increased wine sales and offer opportunities for attracting more local visitors.
- In addition, these events drive and support the non-conventional wine routes.

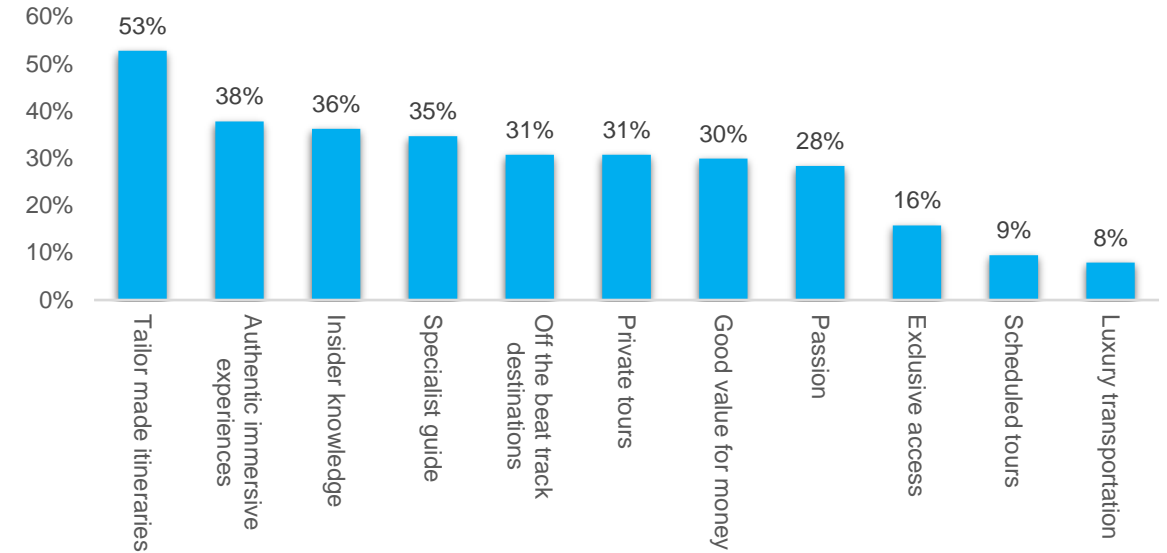
# Wine Tourism in the Western Cape

- Out of the 128 survey respondents 124 answered the question of “How many itineraries do they book on average per month”.
- Figure 4 demonstrates that 60% indicated they booked on average 0 to 20 itineraries per month, while 15% said they booked 21-40 itineraries per month. Only 10% of indicated that they booked 81 or more events.

**Figure 4: How many wine itineraries do you book on average per month?**



**Figure 5: Specify the 3 most important factors of selecting a wine tour operator for your guests.**

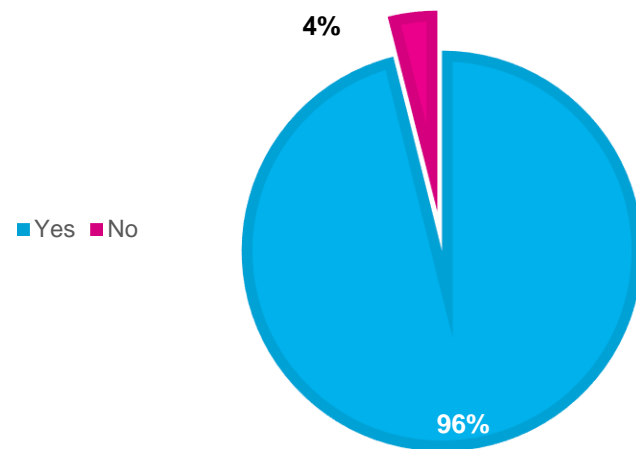


- Respondents could choose from a variety of factors when specifying the three most important aspects in selecting wine tour operators for their guests, as shown in figure 5.
- Respondents were not restricted in the number of selections they made for these questions.
- Some 53% indicated that they selected wine tour operators who created tailor made itineraries for their guests, while 38% stated that they selected operators who offered immerse experiences for their guests. Another 36% stated that they selected those who had insider knowledge of wine tourism.

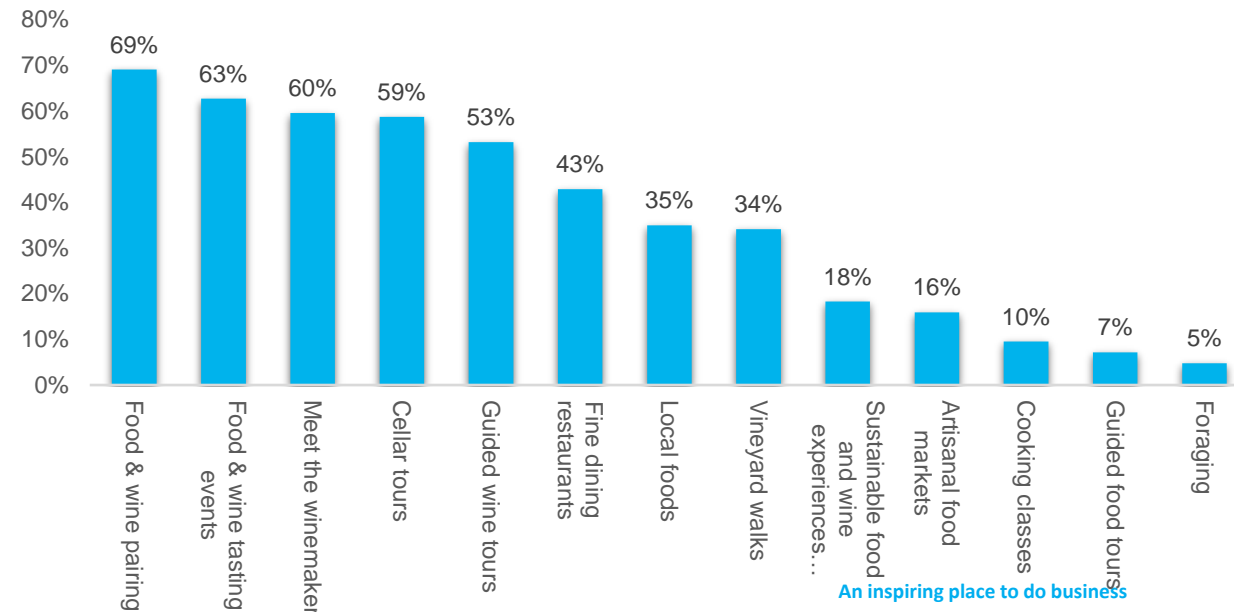
## 2. Motivation for Travel and Activities Offered to Tourists (2022)

- In figure 6, it is evident that 96% of respondents were positive and felt that wine tourism plays a pivotal role in providing an incentive for people to travel to the Western Cape. Only 4% of respondents felt this was not the case.
- Figure 7 gives the breakdown of the different types of wine activities that guests requested. The top leading wine activities requested by guests to the various sampled businesses listed were:-
  1. Food and wine pairing – (69%)
  2. Food and wine tasting – (63%)
  3. Meeting the wine makers – (60%)
  4. Cellar tours – (59%)

**Figure 6: Do you feel wine tourism plays a significant role in the motivation for travel to the Western Cape?**



**Figure 7: What types of wine tourism activities do guests request when visiting the Western Cape?**



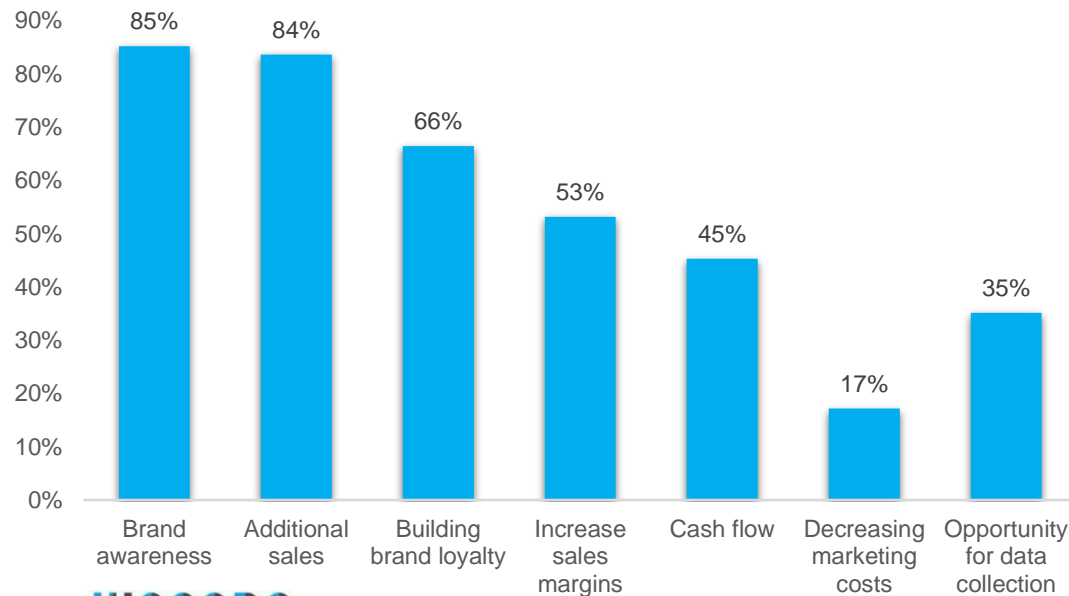
### 3. Benefits and Opportunities in Wine Tourism (2022)

- Figure 8 shows how wineries gain from wine tourism. The leading benefits were brand awareness (85%); sales (84%) and building brand loyalty (66%).

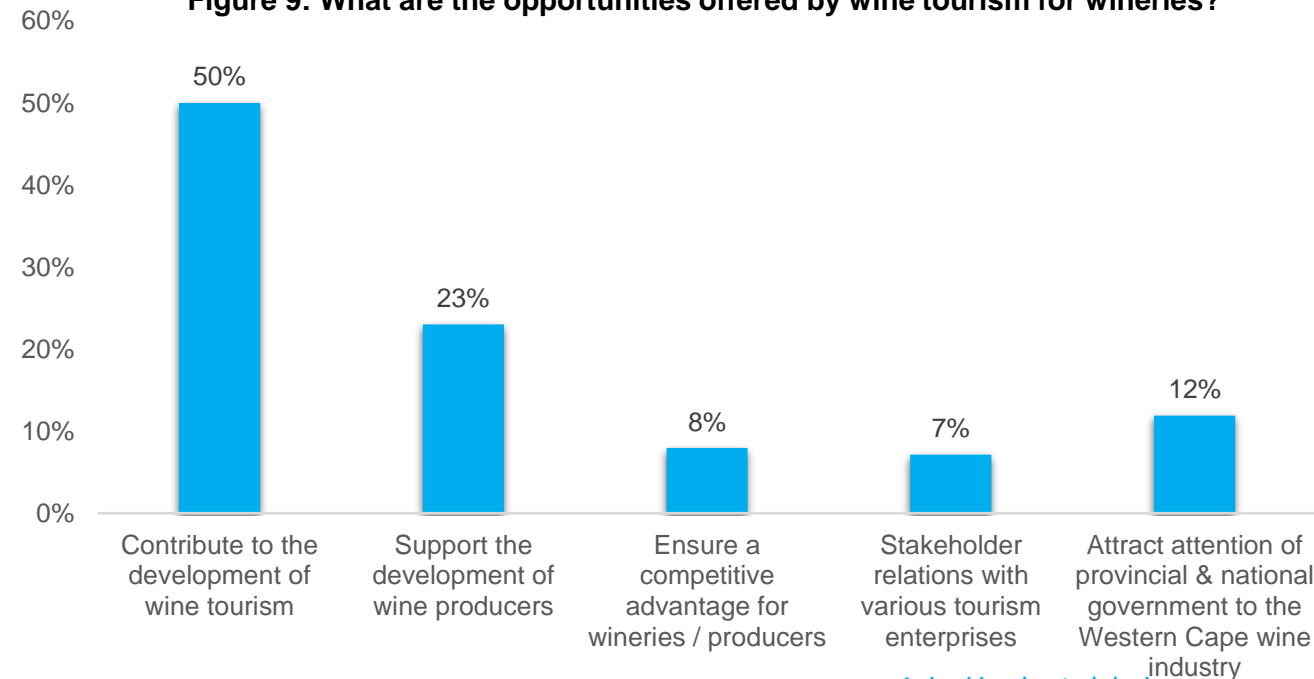
An analysis of responses to the question relating to the opportunities offered by wine tourism for wineries is shown in Figure 9. The top three opportunities were :

1. Contributing to the development of wine tourism (50%).
2. Supporting the development of wine producers (23%) .
3. Attracting the attention of both provincial and national government.

**Figure 8: What are the benefits of wine tourism for wineries?**



**Figure 9: What are the opportunities offered by wine tourism for wineries?**





# 4. Top Reasons for Visiting Wineries (2022)

- There are many regions and towns that can be visited when one is in the Cape Winelands. These include Ceres, Franschhoek, Paarl, Stellenbosch, Wellington and Tulbagh.
- The sampled businesses were asked whether tourism had grown or declined in the past 12 months. Most respondents (81%) indicated that their businesses had grown in the past 12 months with only 19% declaring a decline in their yearly performance.
- Respondents were asked to choose the main reasons why guests visited their estates. 80% of respondents said recommendations/word of mouth was the primary reason. For 60%, it was "reputation", while 49% had experienced "repeat visitors"

Figure 10: Has wine tourism grown or declined in the last 12 months?

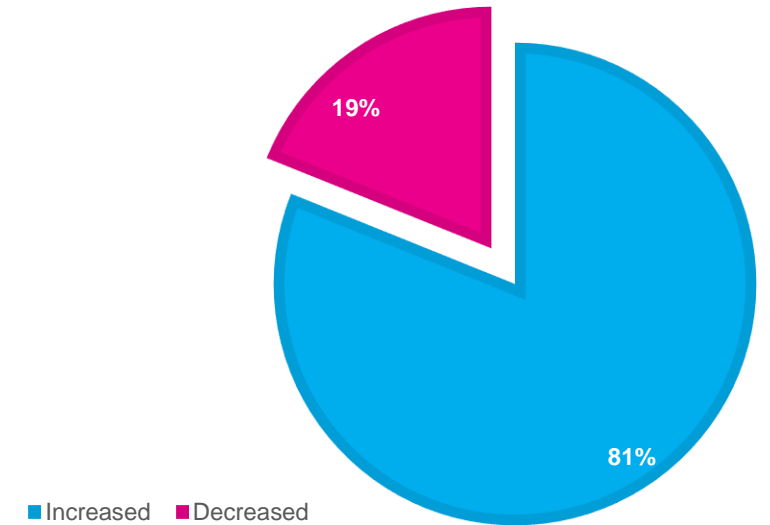
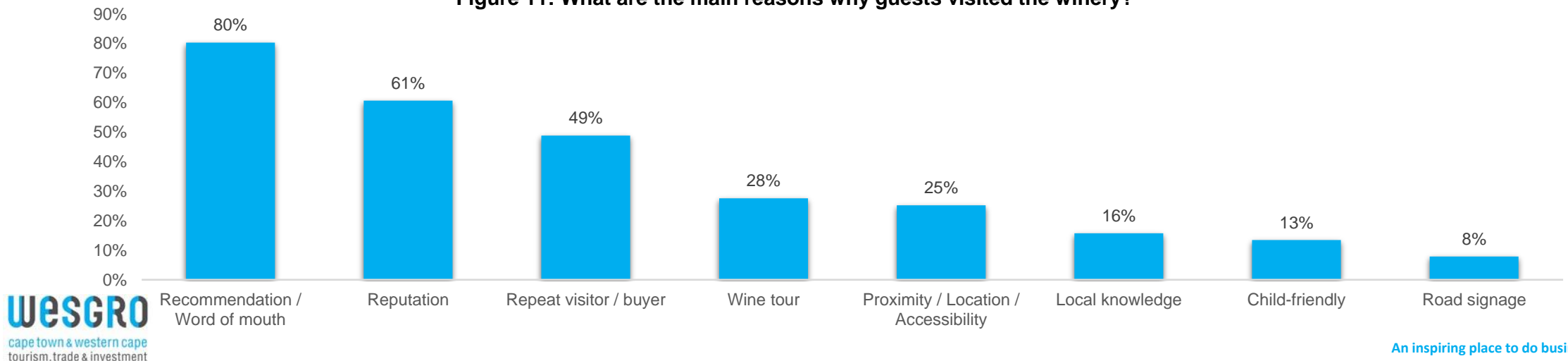


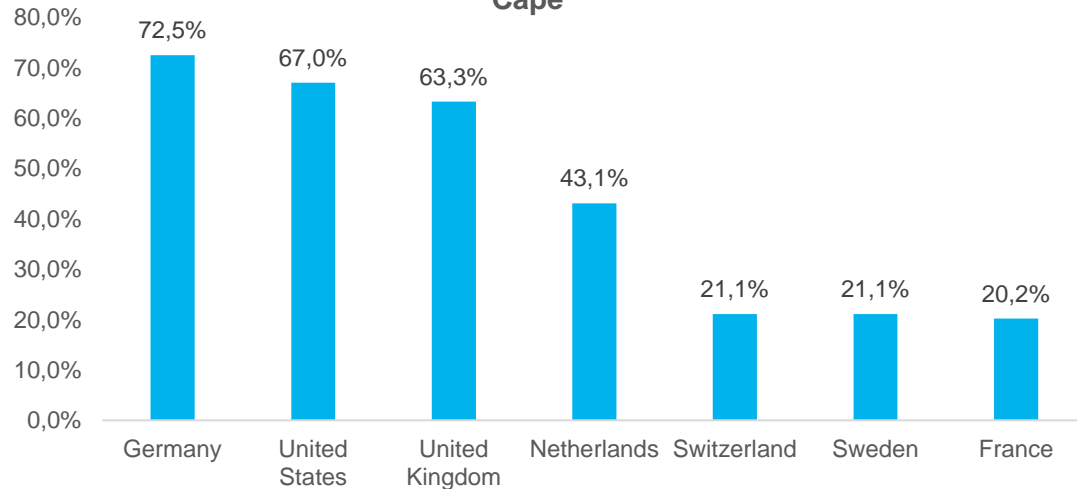
Figure 11: What are the main reasons why guests visited the winery?



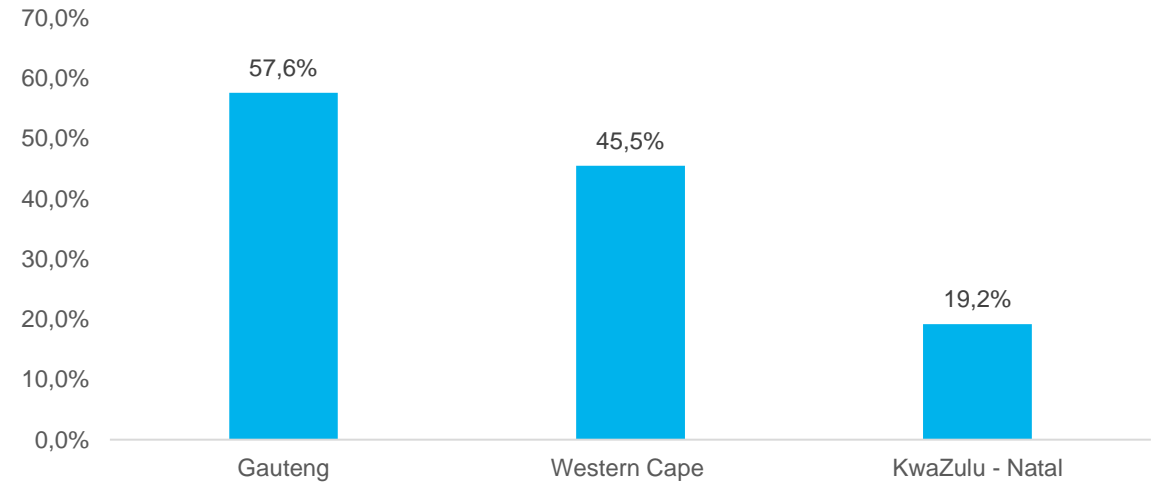
# 5. Top International and Domestic Source Markets (2022)

- With the Western Cape having accounted for 16% of all international tourist arrivals to South Africa in 2022, survey respondents were asked to indicate the top international markets who were mostly interested in food and wine activities.
- The top international source market for tourists interested in food and wine activities was Germany, which accounted for 72.5% followed by the United States (67.0%) and the United Kingdom (63.3%) as reflected in figure 12. Other top markets were from Netherlands, Switzerland and France.
- Figure 13 shows the top domestic markets interested in food and wine activities in the Western Cape. These were Gauteng (57.6%), Western Cape (45.5%) and KwaZulu-Natal (19.2%).

**Figure 12: Please indicate the top 6 international markets interested in food & wine activities when visiting the Western Cape**



**Figure 13: Please identify the top 3 domestic markets according to their interest in food & wine activities**



# 6. Top Five Most Requested Wine Routes in the Western Cape (2022)

Listed below and demonstrated in figure 14 and 15, are the top five most requested wine routes in the Western Cape in 2022, according to the survey responses:

1. Stellenbosch (92%), dominated all wine routes listed, followed by:
2. Franschhoek (81%)
3. Constantia (61%)
4. Hermanus Wine Valley (48%)
5. Durbanville

Figure 14: What are the 5 most requested wine routes?

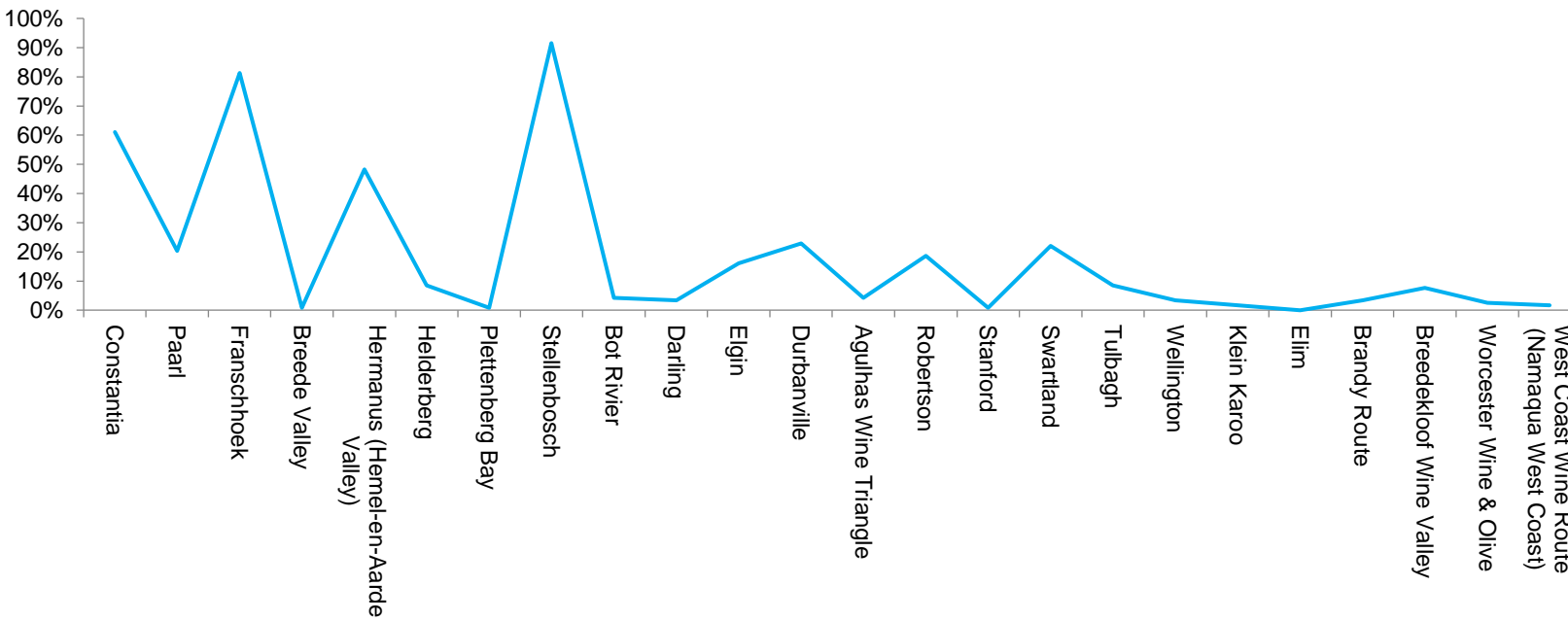
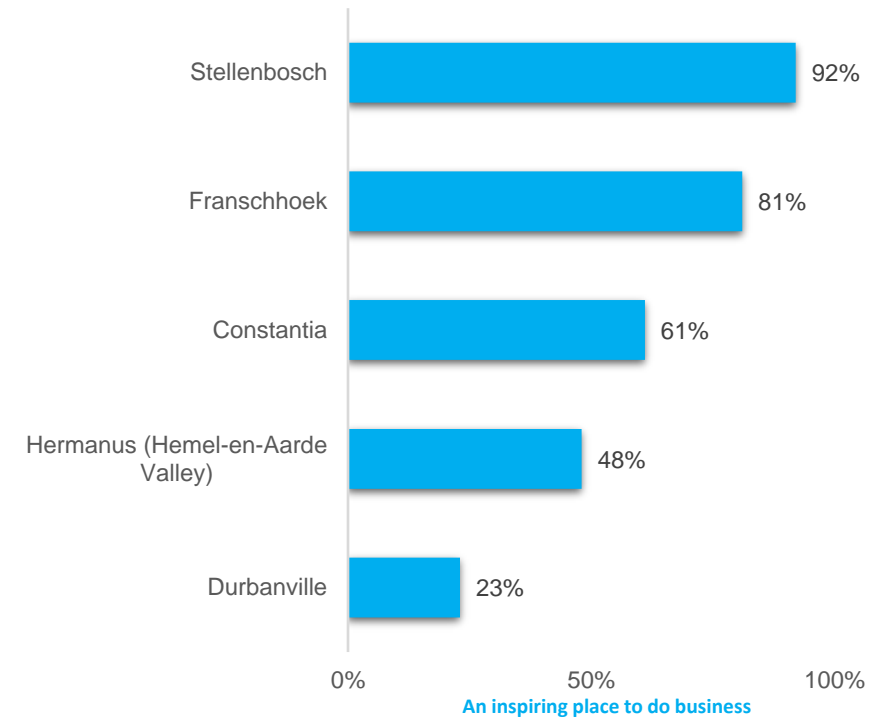


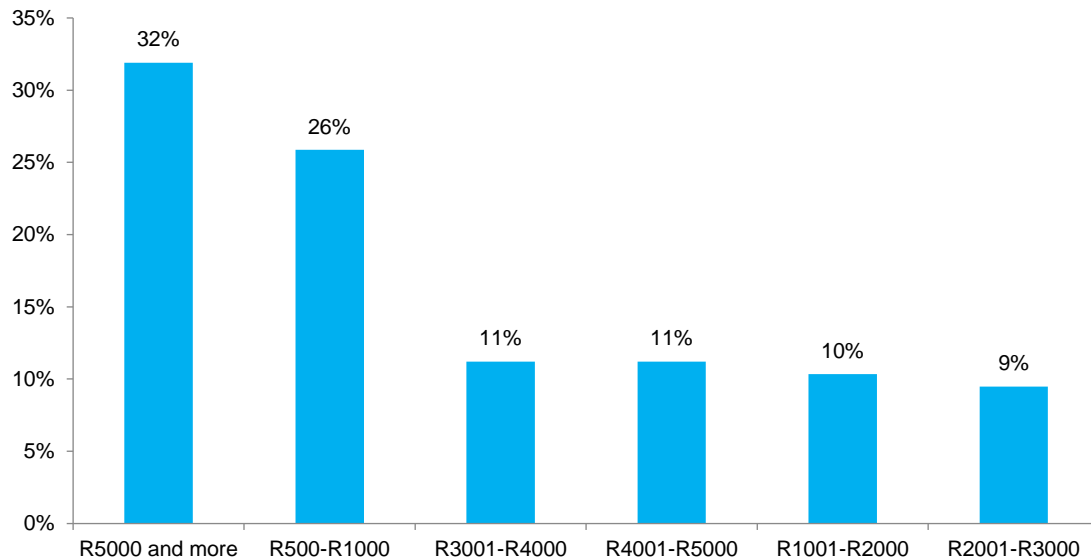
Figure 15: What are the 5 most requested wine routes?



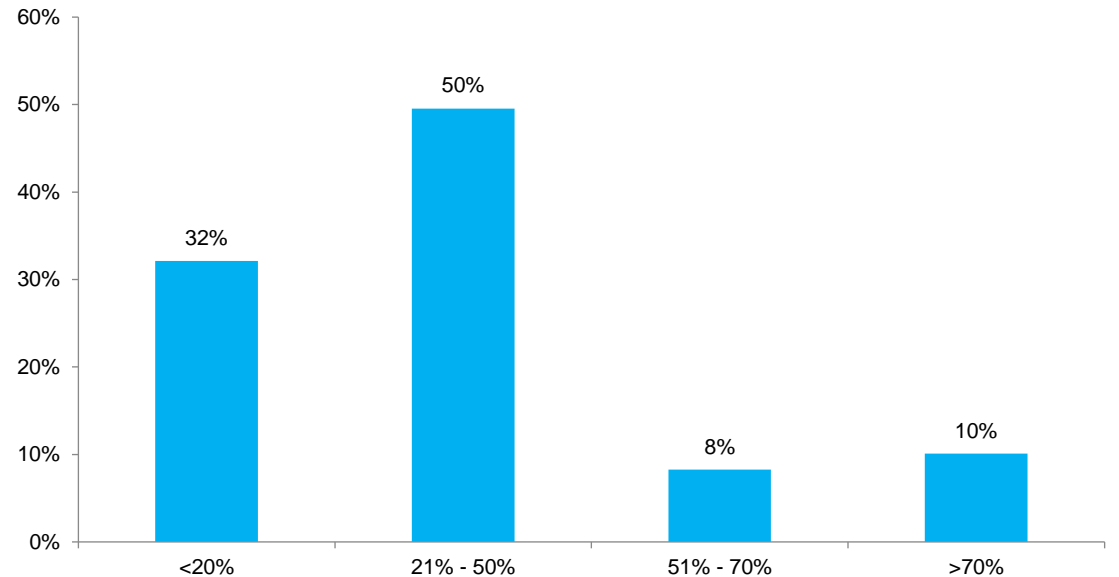
# 7. Wine Tourists' Average Spend (2022)

- A total of R17 billion was spent in the Western Cape by international travellers in 2022, quadrupling the amount of R4 billion reached in 2021.
- According to the data received for the report, the highest amount spent by 32% of tourists was R5 000 and more, while the lowest was between R2 001 and R3 000 (spent by 9% of tourists). This data can be seen in Figure 16.
- Respondents were also asked if wine tourists spent more money than non-wine tourists. According to Figure 17, 50% of respondents indicated that wine tourists spent 21% to 50% more than non-wine tourists. And 10% of respondents said that wine tourists spent 70% (and above) more than non-wine tourists.

**Figure 16: What is the average spend per person? (Excluding flights, but including accommodation and local transportation).**



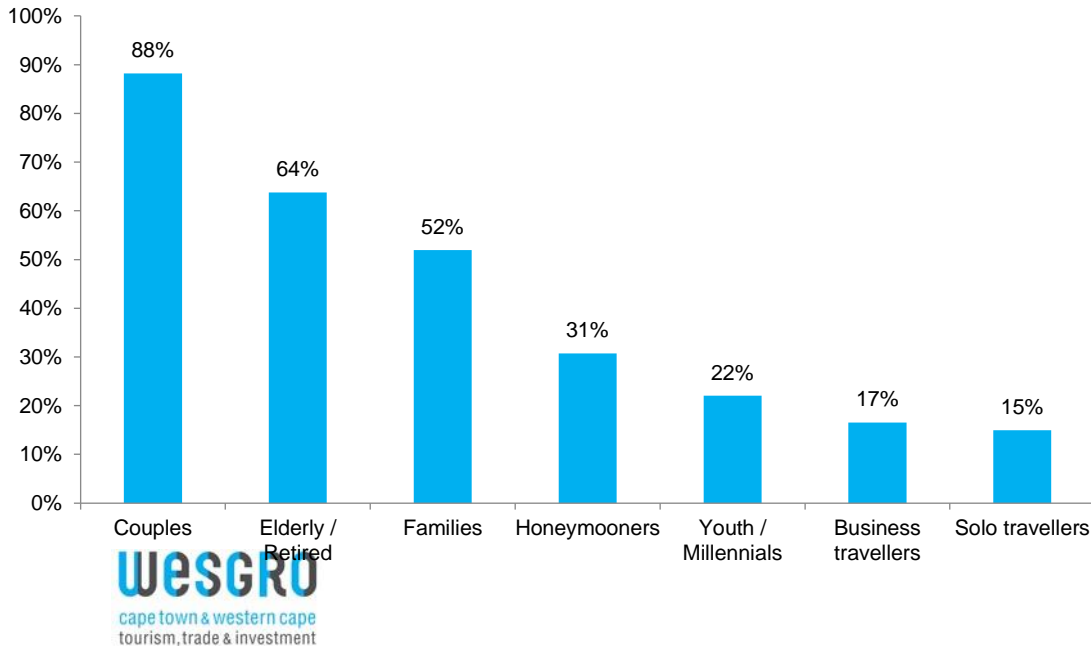
**Figure 17: Do wine tourists typically spend more money than non-wine tourists? If yes, approximately how much more?**



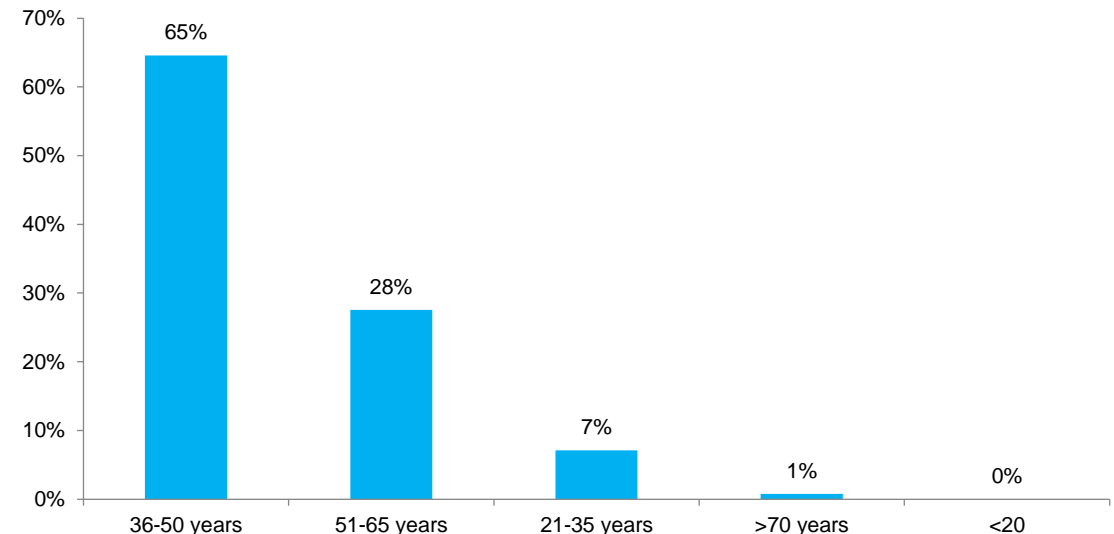
# 8. Top Three Types of Travellers and Age Groups Requesting Food & Wine Activities (2022)

- In Figure 18, it is evident that the top three types of travellers requesting wine-related activities were couples (88%), followed by elderly/retired people (64%), with families in third position (52%).
- Figure 19 shows that most people (65%) requesting wine-related activities were between the ages of 36 and 50 years, 28% were between 51 and 65 years, and 7% were between 21 and 35 years of age.

**Figure 18: Please select the top 3 types of travellers who most often request wine-related activities while visiting the Western Cape.**



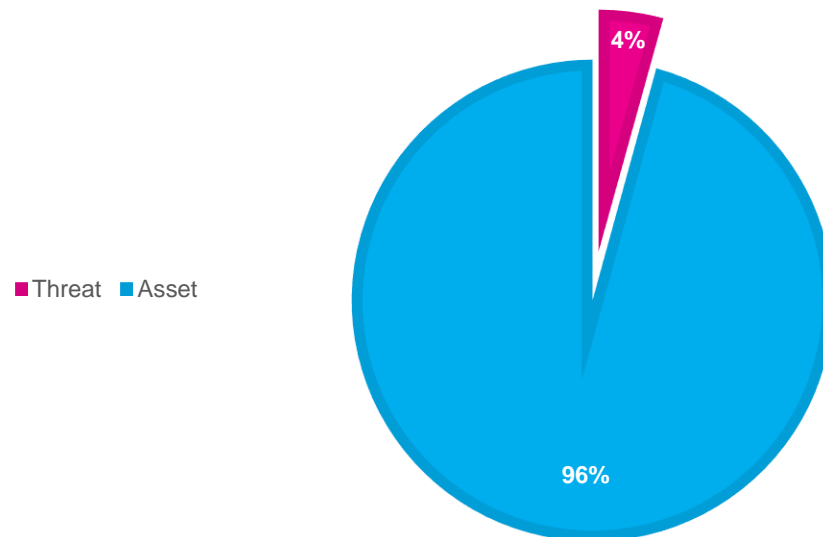
**Figure 19: Please select the top age group that most frequently requests food & wine-related activities while visiting the Western Cape.**



# 9. Emerging Technology in Travel and Tourism – Threat or Asset?

- Emerging technology was seen as an asset by most businesses who responded to the survey. Technology is currently changing travel and tourism practices not only for businesses but for consumers as well.
- Examples of emerging technology include online flight and hotel bookings, business advertising and restaurants using QR codes for customers to obtain menus. These technologies help businesses to access data in an easier format. They also provide more accessible methods of obtaining information and allow customers to save time and costs.
- In Figure 20, one can see that 96% of respondents were positive about emerging technology and saw it as an asset, while 4% of them perceived this type of technology as a threat.

Figure 20: Has emerging technology been a threat or asset towards your company?



# 10. Sustainable Practices in Wine Tourism (2022)

- Close to 70% of tourism businesses indicated that they were making use of sustainable wine tourism practices. These practices included using local suppliers for their business needs, providing support to biodynamic and organic suppliers, and continuously striving to being more economically and socially sustainable in the regions in which they operate.
- As shown in Figure 22, 46% of respondents indicated that 15-20% of their guests cared about sustainability, while 38% said 30 – 60% of their visitors were supporters of sustainability in wine tourism practices.

Figure 21: Do you have sustainable wine tourism practices?

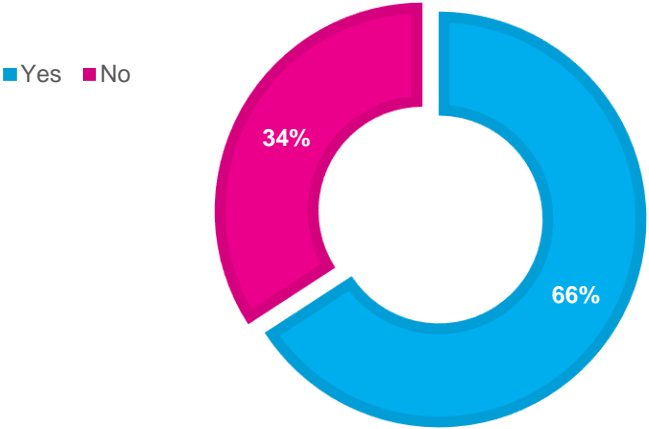
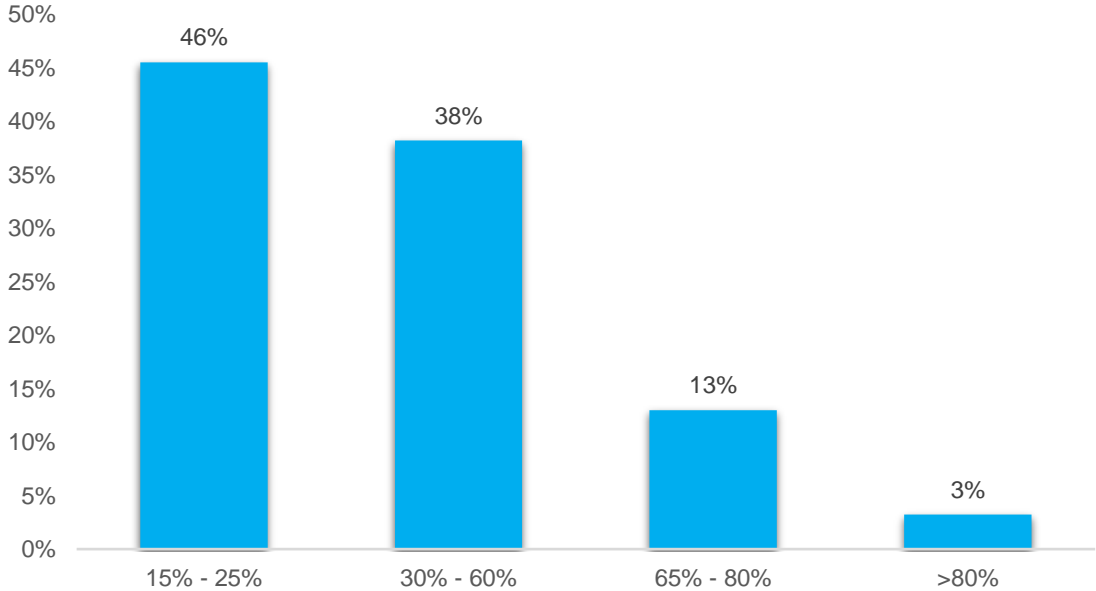


Figure 22: What % of your guests care about sustainability?

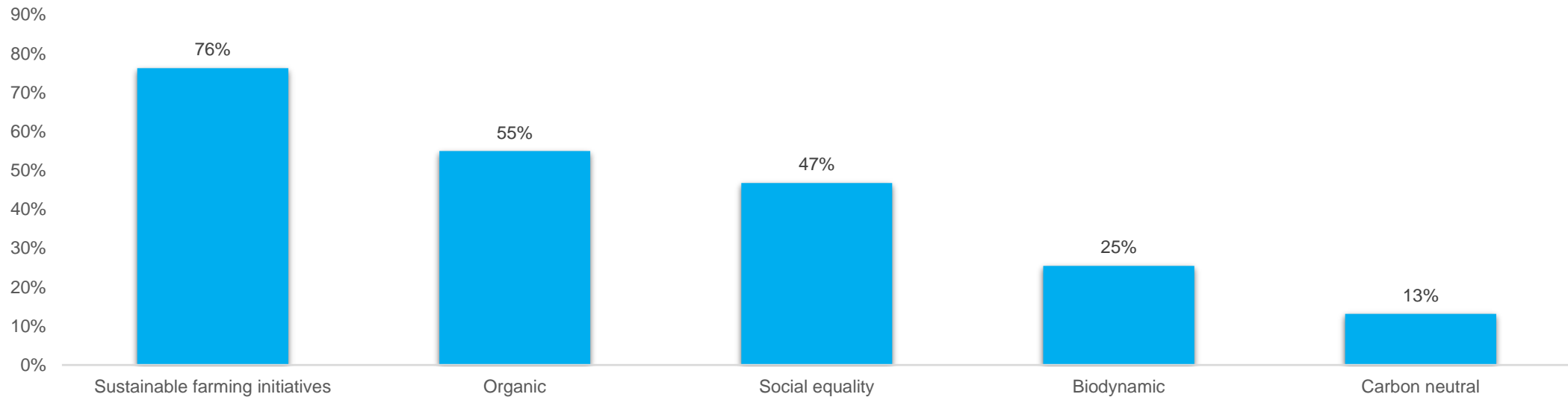


# 11. Types of Sustainable Wine Experiences in the Western Cape (2022)

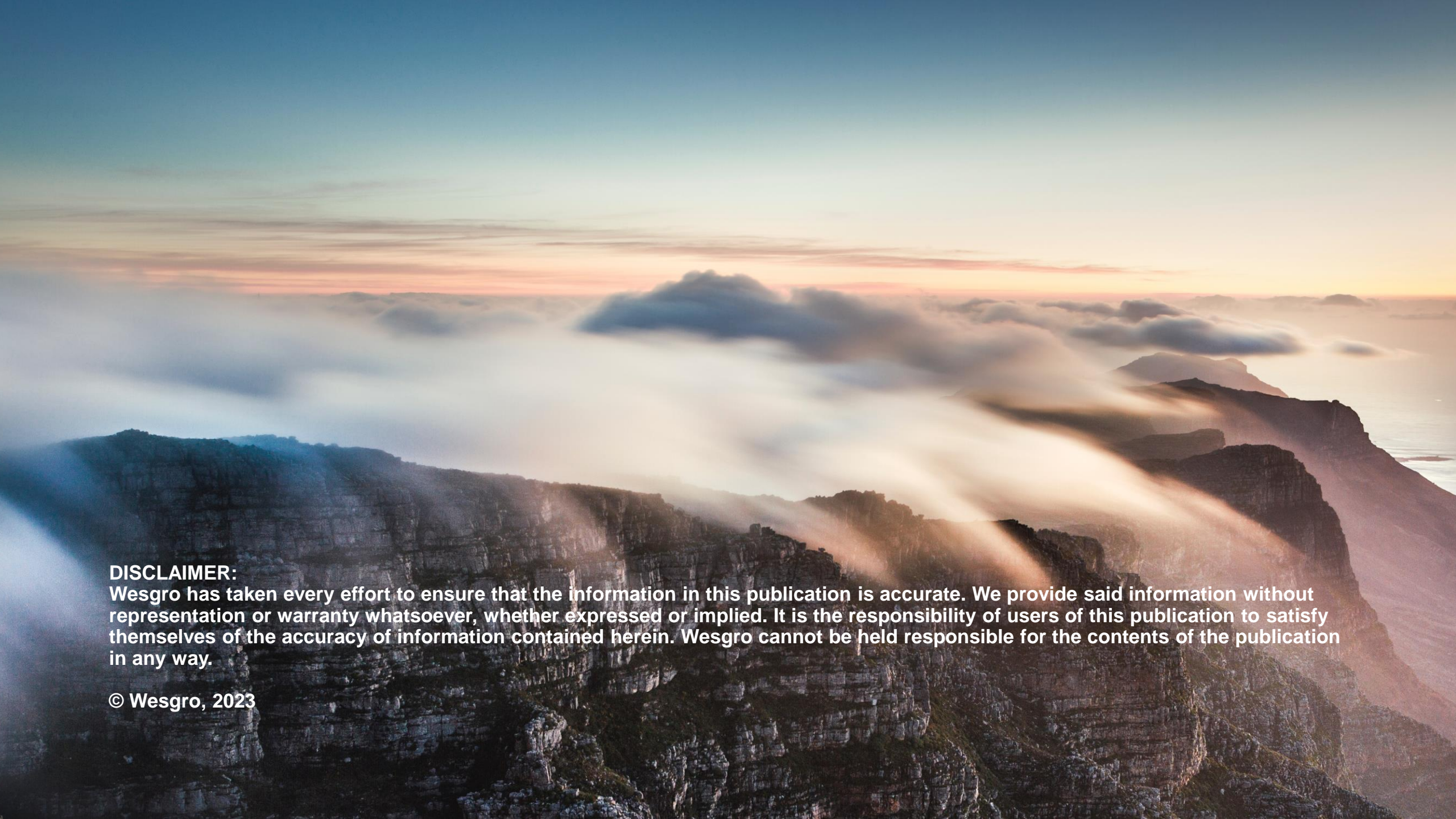
Figure 23 below highlights the types of sustainable wine practices that were of interest to visitors travelling to the Western Cape.

- Sustainable farming initiatives (this attracted the interest of 76% of visitors).
- Organic practices (some 55% of visitors were interested in this).
- Social equality endeavors (47% showed an interest).
- Biodynamic initiatives (25% were interested).
- Carbon Neutral practices (13% of visitors had an interest in this).

**Figure 23: Choose from the list below what types of sustainable wine experiences are of interest to visitors travelling to the Western Cape.**







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