



Winelands

Tourism Visitor Trends

Annual 2023

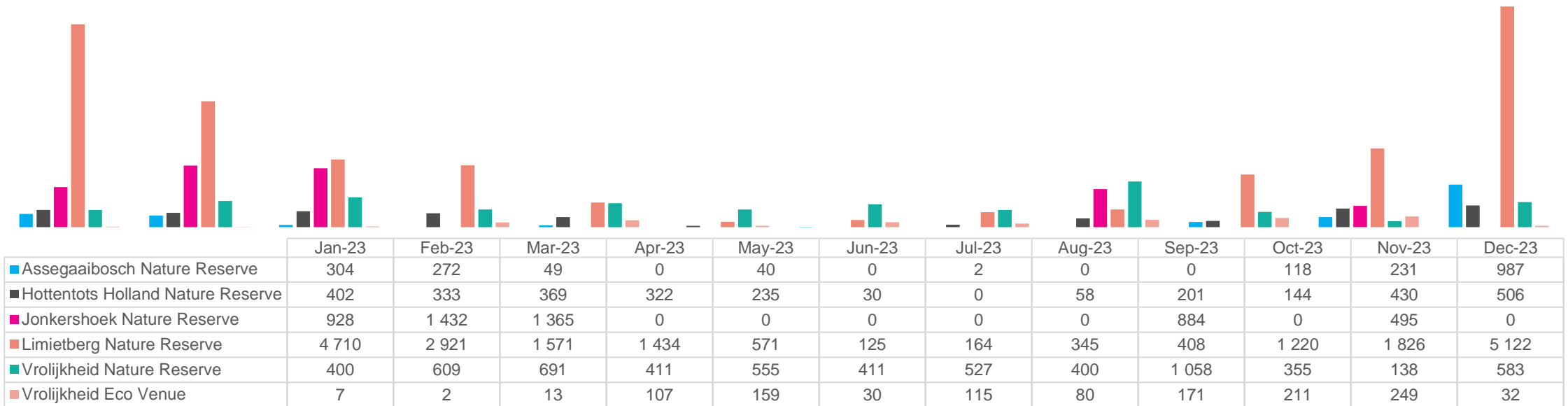
Contents

1. Cape Nature Visitor Trends
2. Methodology and Sample Size
3. Winelands Mobile Location Data Insights
 - 3.1 Domestic Visitor Trends
 - 3.2 International Visitor Trends
4. Langeberg Visitors & Attractions
5. Stellenbosch Wine Valley Route
6. Sources

1. Cape Nature Visitor Trends

- The attractions included in this report are participating attractions from Cape Nature which are shared with Wesgro. Cape Nature is a government entity responsible for managing and maintaining 31 nature reserve complexes comprising 112 nature reserves and is found in the Western Cape province only.
- Figure 1 below shows that a total of 37 868 visitors were welcomed at six nature reserves in the Winelands in 2023. Limietberg Nature Reserve had the highest visitor arrivals share in the region totaling 20 417 in the year. This was followed by Vrolijkheid Nature Reserve (6 138) and Jonkershoek Nature Reserve (5 104).

Figure 1: Total Visitors to Cape Nature Parks in the Winelands, 2023



Visitor Trends Mobile Location Data Insights

2. Methodology and Sample Size

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 in” to location sharing (or choose not to “opt in”). When they opt in, then their phone collects data and shares it with the publisher companies.
- 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 region.
- Mobile location data serves as a sample. It does not represent 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.

The insights in this report represent mobile location data from a sample of 587 516 domestic and 3 106 international tourists who visited the Winelands between January – December 2023. Within the domestic data set, 442 018 were from the City of Cape Town and from the international sampled tourists, 602 were from the United States and 331 from the United Kingdom.

2. Winelands Visitor Trends: Sample Size

Figure 2: Sample Size of Domestic and International Visitors to the Winelands: 2023

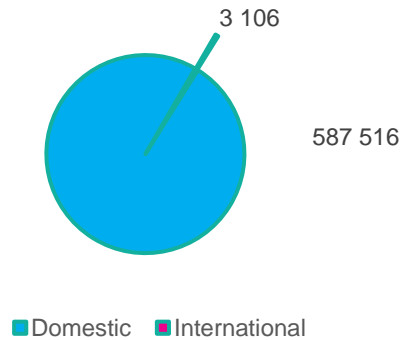


Figure 3: Sample Size of Domestic Visitors from Top 10 Municipalities of Origin: 2023

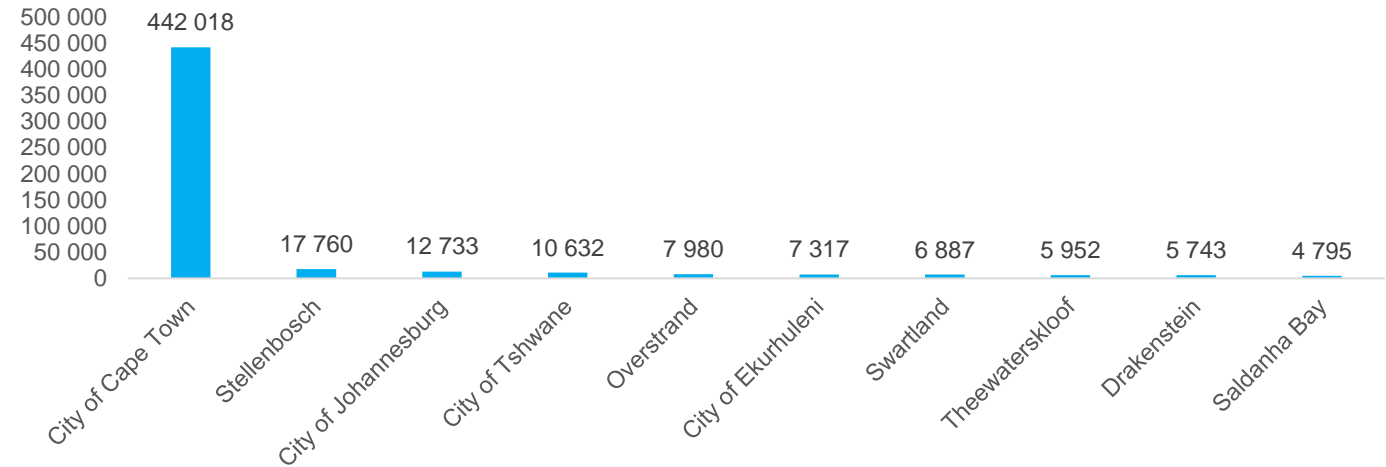
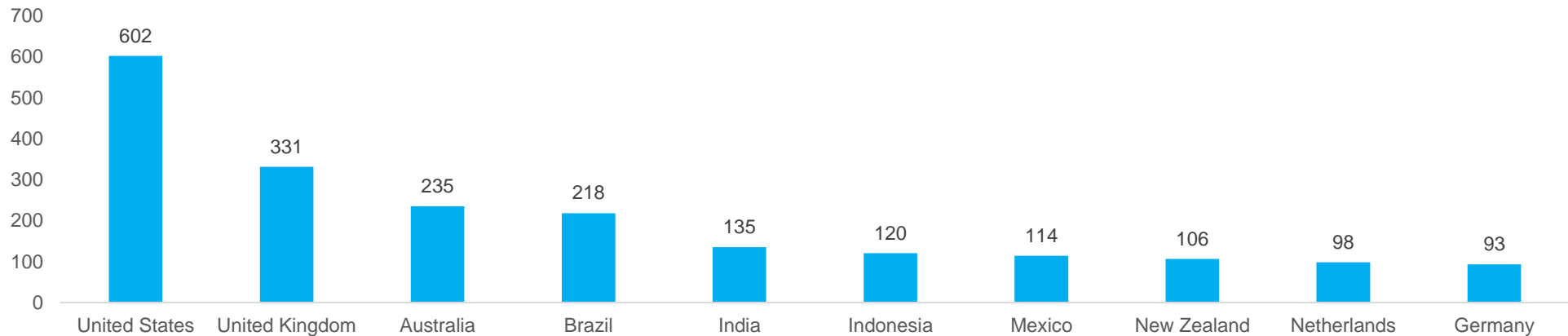


Figure 4: Sample Size of International Visitors from Top 10 Countries of Origin: 2023



Domestic Visitor Trends

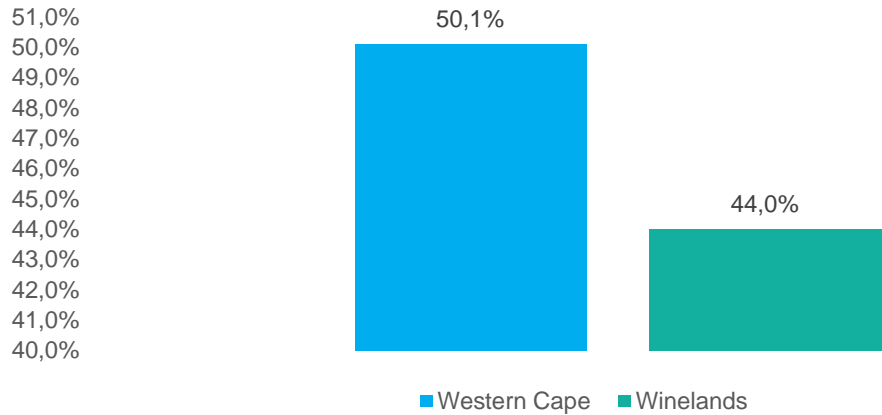
WESGRO

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

An Inspiring Place To Do Business

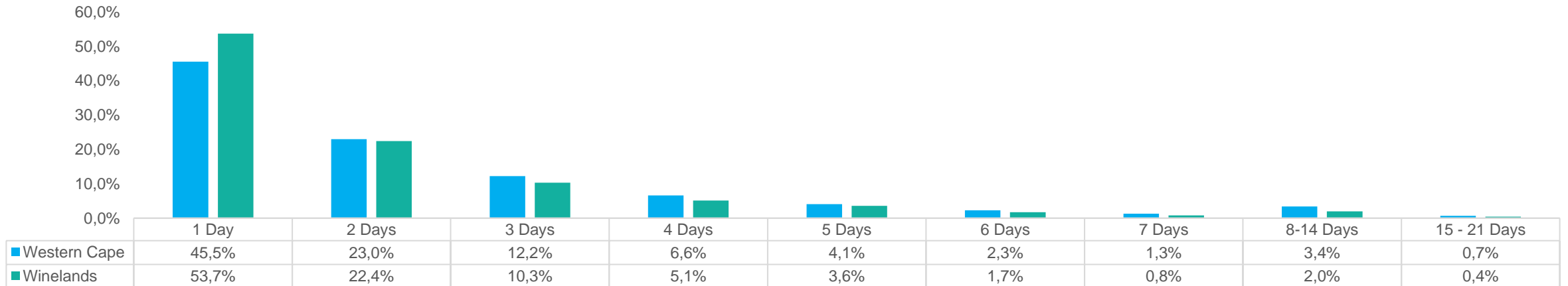
3.1. Mobile Insights: Domestic Visitor Trends

Figure 5: Percentage Share of Sample who Stayed Overnight in the Western Cape and in the Winelands 2023: Domestic



- For the period under review (Jan – Dec 2023), 44% of the sampled domestic tourists stayed overnight in the Winelands, while the Western Cape saw 50.1% of guests staying overnight in various regions of the province.
- Figure 8 shows that most visitors to the Winelands were day visitors 53.7% with the remainder of 46.3% being overnight visitors.

Figure 6: Average Length of Stay in the Western Cape & Winelands in 2023: Domestic



3.1. Mobile Insights: Domestic Visitor Trends

- Figure 7 shows that arrival days for domestic visitors to the Winelands were predominantly on Friday (16.8%) and Saturday (16.5%) as well as Monday (15.9%). This can be attributed to the Winelands being an attractive destination for both leisure and business tourists, with Fridays and Saturdays being for leisure, and the start of the week being for work purposes. The high arrival rate on weekends is also seen in the Western Cape.
- Most domestic tourists left on a Sunday in the Western Cape (17.6%), as was the case in the Winelands region (17.3%), as can be seen in Figure 8

Figure 7: Popular Arrival Days of the Week for Visitors to the Western Cape and in Winelands 2023: Domestic

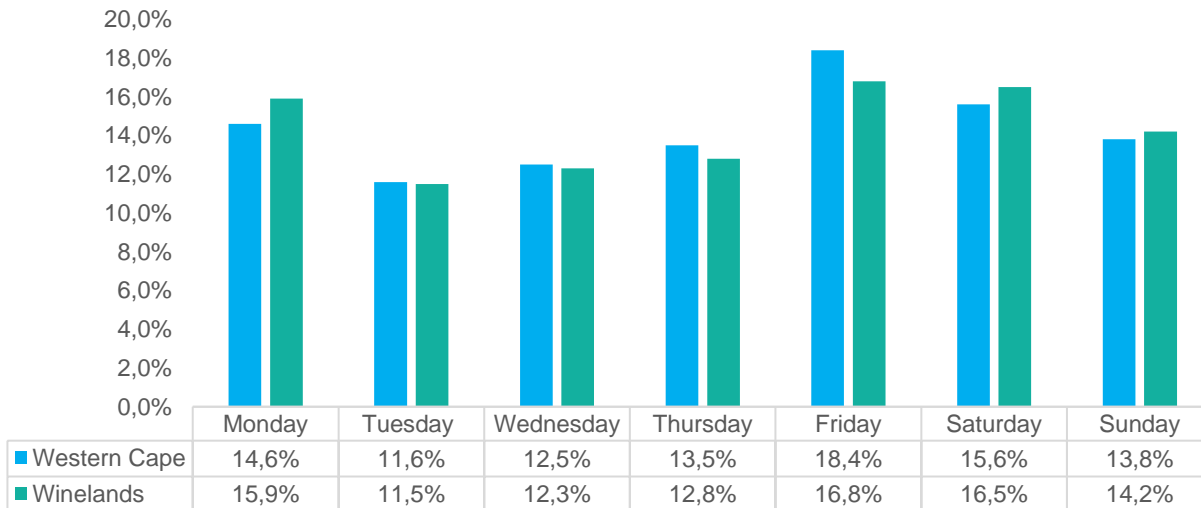
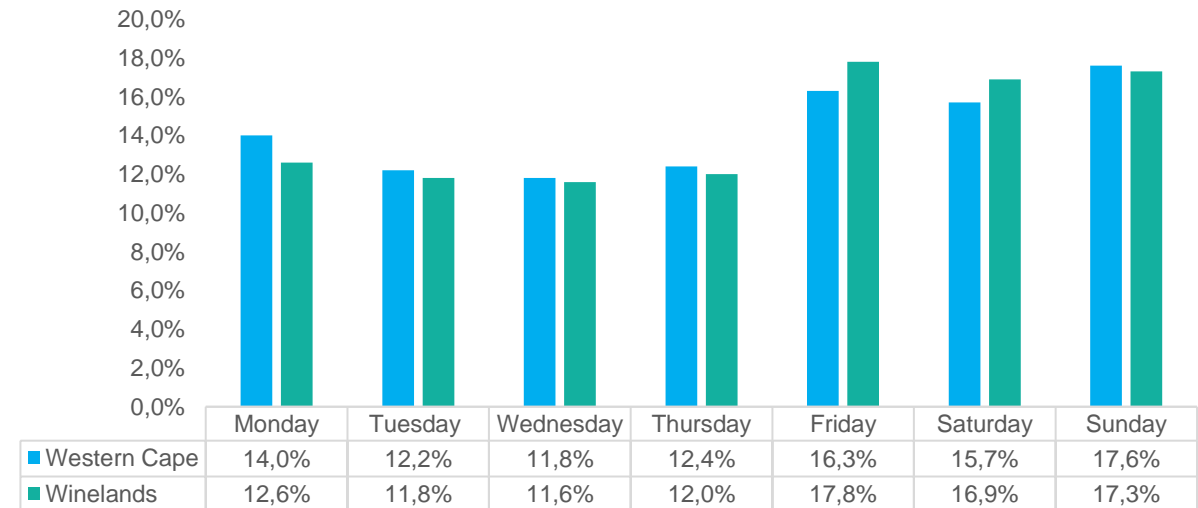


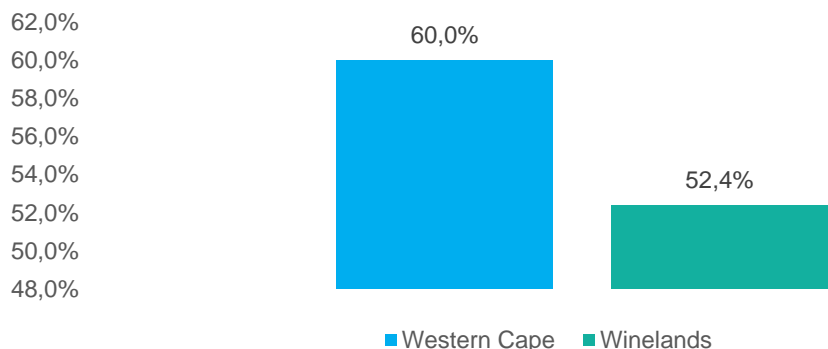
Figure 8: Popular Departure Days of the Week for Visitors Leaving the Western Cape and in the Winelands 2023: Domestic



International Visitor Trends

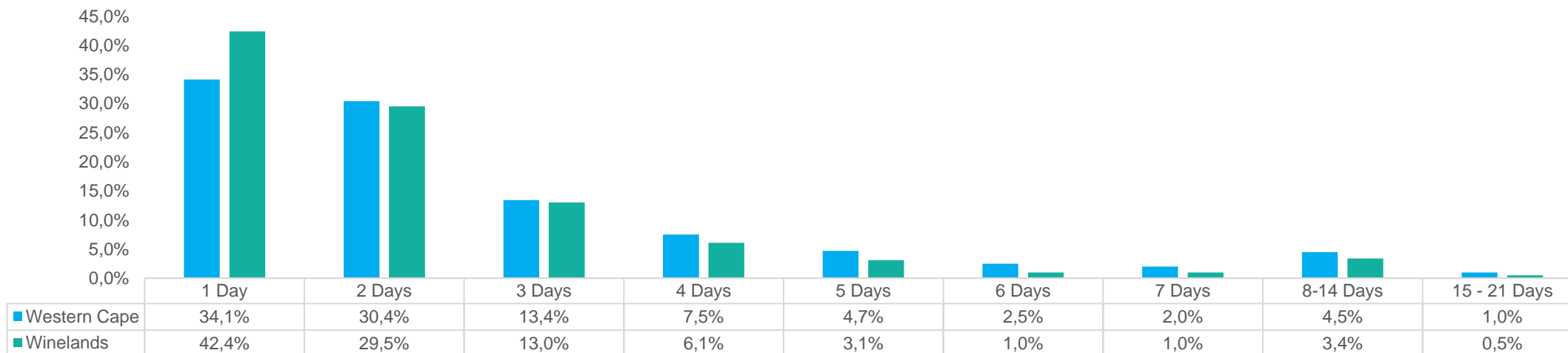
3.2. Mobile Insights: International Visitor Trends

Figure 9: Percentage Share of Sampled Tourists who Stayed in the Western Cape and in the Winelands 2023: International



- Figure 9 shows that 52.4% of the sample were international tourists who stayed in the Winelands, with the Western Cape holding a 60% share of international overnight visitors.
- On average, international tourists stayed for between one to two days in both the Western Cape and the Winelands. However, a few more visitors managed to stay for longer periods with others staying for more than two weeks. As seen in Figure 10.

Figure 10: Average Length of Stay in the Western Cape & Winelands 2023: International



3.2. Mobile Insights: International Visitor Trends

- Figure 11 shows that the popular arrival days for tourists to the Winelands were over the weekend, specifically Friday (15.8%) and Saturday (15.2%). This can be attributed to the activities offered in the region, where visitors want to relax, enjoy the scenery with a glass of wine in hand.
- Figure 12 shows the popular departure days from the Winelands were like the arrival days with Friday holding the greatest share at 16.3%, followed by Saturday at 15.9%.
- For the Western Cape, the most preferred day of arrival for all tourists was Friday, and departure days were either Friday or Sunday.

Figure 11: Popular Arrival Days of the Week for Visitors to the Western Cape and the Winelands 2023: International

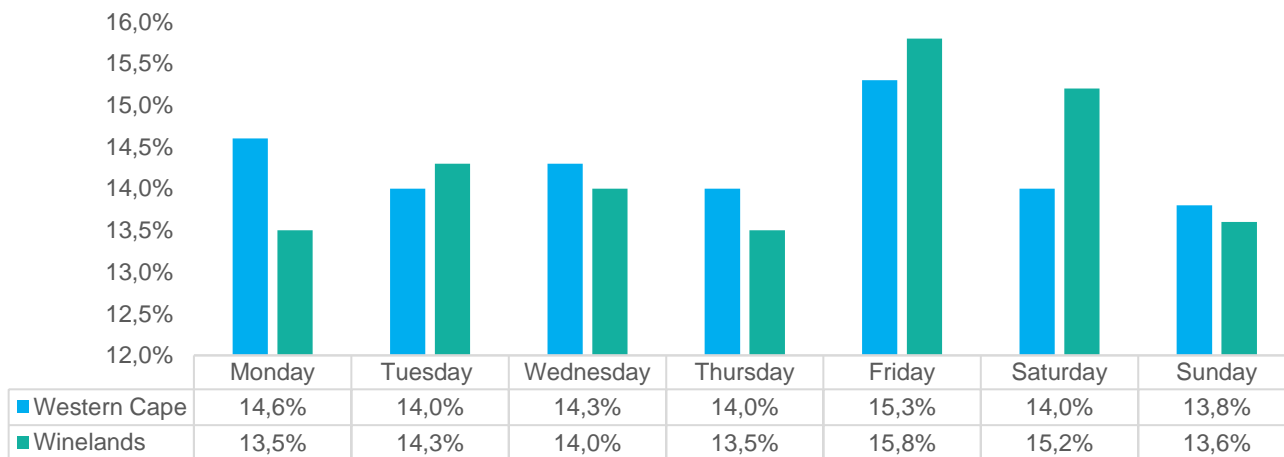
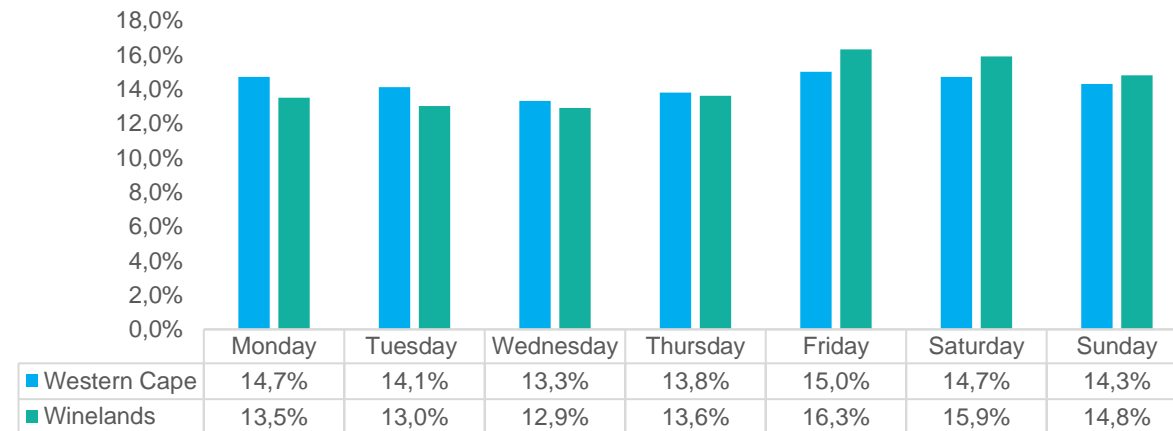


Figure 12: Popular Departure Days of the Week for Visitors Leaving the Western Cape and the Winelands 2023: International



Langeberg Visitors & Attractions

4. 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.
- Figure 13 shows that more than 400 000 people visited the Langeberg region in 2023, a decline of 11% y-o-y when compared to 2022.
- The town of Montagu continues to attract an influx of visitors, with a total of 1 602 324 arrivals recorded over the period 2018-2023.

Figure 13: Tourist Arrivals in (Robertson, Montagu & McGregor), 2018–2023

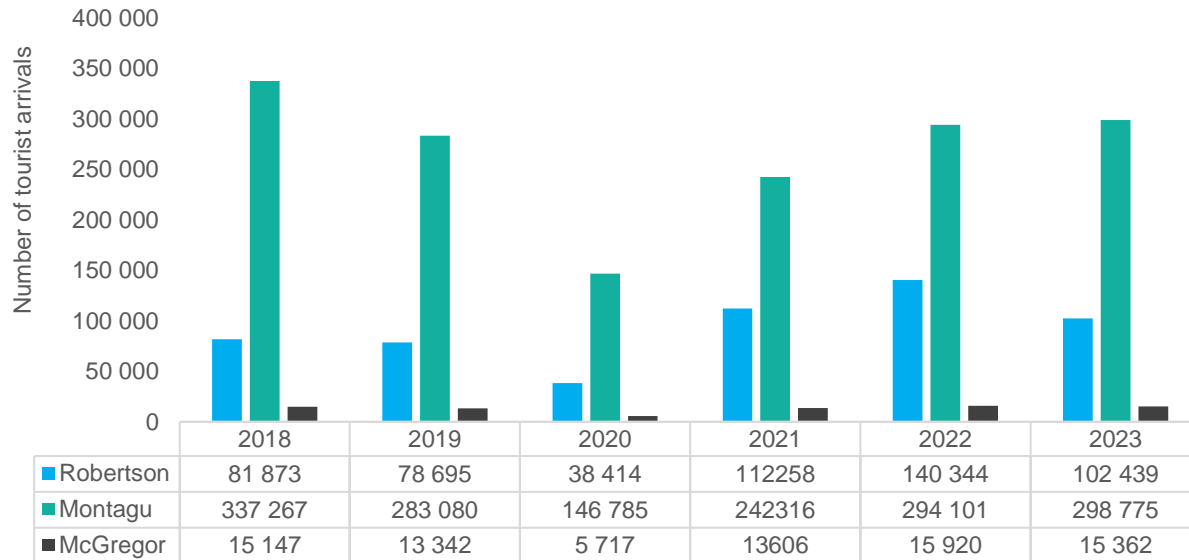
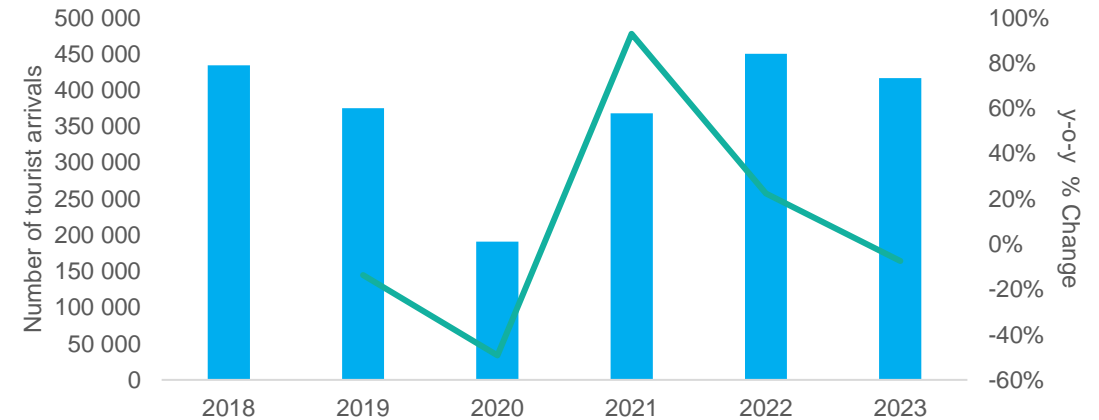


Figure 14: Total Tourist Arrivals in Langeberg, 2018–2023



	2018	2019	2020	2021	2022	2023
Total	434 287	375 117	190 916	368 180	450 365	416 576
y-o-y % Change		-14%	-49%	93%	22%	-8%
19/23 Recovery						111%

4. Langeberg Visitor Trends

- The following graphs show the visitor numbers per town for the Langeberg area between January and December from 2018 to 2023. As seen in Figure 16, Montagu received the most visitors throughout the 6-year period, followed by Robertson and McGregor (Figures 15 and 17). A positive y-o-y % growth was seen in Montagu when compared to the same period in 2022, with Robertson and McGregor both recording a decline in visitor arrivals.

Figure 15: Robertson Tourist Arrivals, 2018–2023

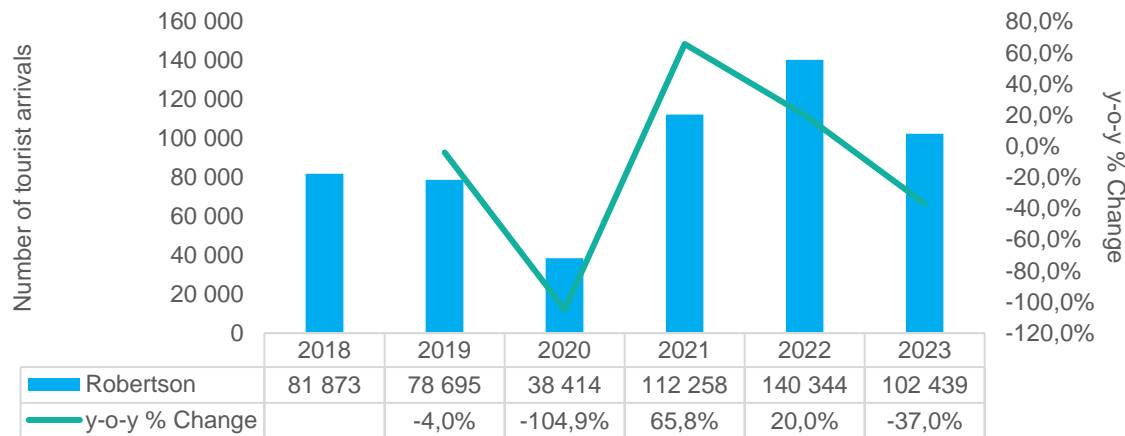


Figure 16: Montagu Tourist Arrivals, 2018–2023

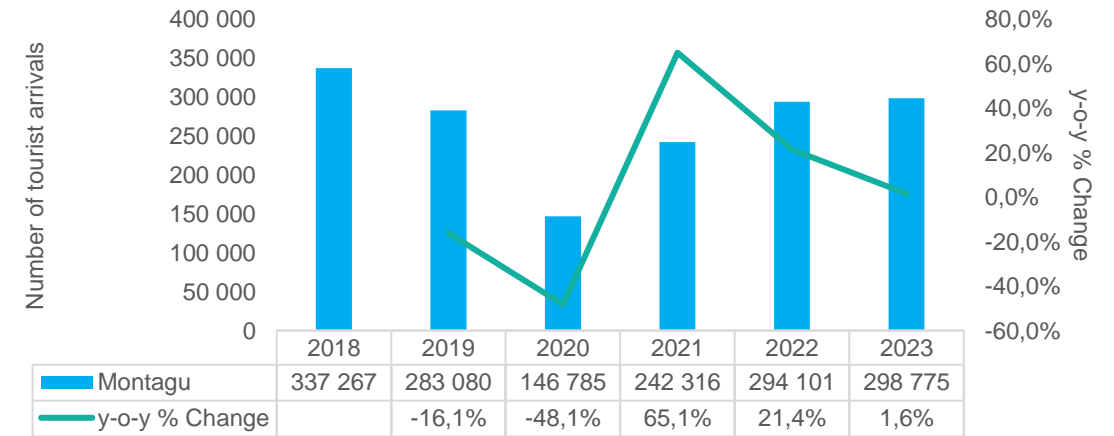
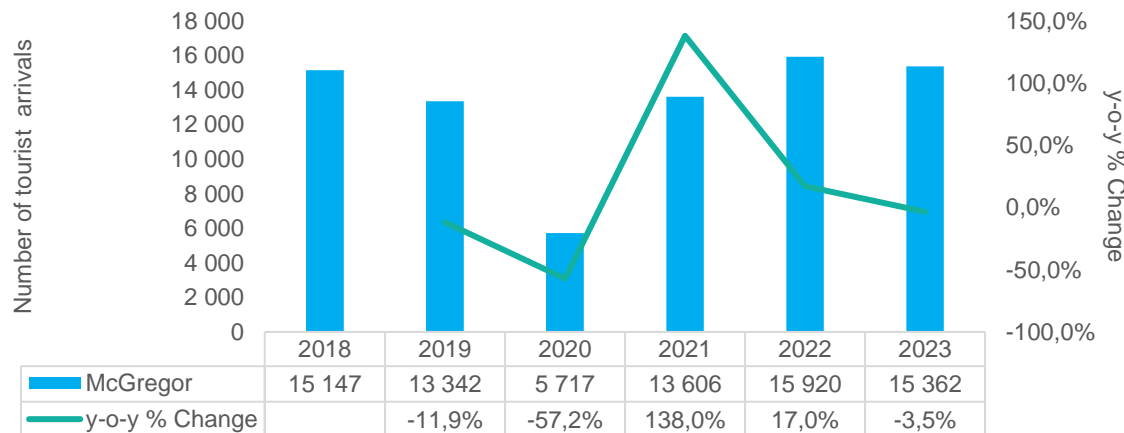


Figure 17: McGregor Tourist Arrivals, 2018–2023



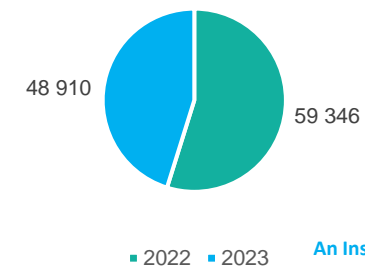
4. Langeberg Attractions

- Figure 18 shows the total number of visitors to attractions in the Langeberg area between January and December in 2022 and 2023. On an annual basis, the number of visitors to attractions in the region declined by 18% y-o-y to 48 910 in 2023, down from 59 346 visitor arrivals recorded in 2022.
- Looking at the individual attractions in the Langeberg area, as shown in Table 1, Viljoensdrift had the most visitors from January to December 2023 with a total of 12 797 arrivals . These were followed by Avalon Springs and Birds Paradise. Table 2 shows that the villa “Whanfried” had a 96.4% y-o-y growth in arrivals when compared to 2022. A positive y-o-y percentage growth in the number of visitors could be observed at several other attractions, including the Montagu Caves 19.4% and Avalon Springs 14.8%.

Table 1: Langeberg Attractions (2023)	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23
Birds Paradise	926	434	850	921	377	400	800	481	0	417	363	1 276
Viljoensdrift River Cruise	1 329	1 434	1 785	2 052	722	49	256	812	0	585	0	3 773
Protea Tractor Trips	347	209	442	539	218	218	432	232	0	232	484	765
Avalon Springs Day Visitors	0	0	910	1 496	1 197	770	1938	1061	0	775	453	3 034
Wahnfried	213	115	151	136	93	210	192	263	0	114	182	279
Lords Wines	245	259	247	607	370	416	200	240	0	147	189	237
Nerina Guest Farm	48	30	69	22	39	0	10	7	0	0	0	0
Flying Feet	100	63	90	100	50	10	63	87	0	10	104	176
Eseltjiesrus Donkey Sanctuary	539	325	527	581	143	649	858	539	0	461	415	771
Montagu Guano Caves	650	475	0	0	0	0	0	0	0	0	0	0

Table 2: Langenerg Attractions (2022 v 2023)	2022	2023	Y-O-Y % Change
Birds Paradise	8 035	7 245	-9.8%
Viljoensdrift River Cruise	18 212	12 797	-29.7%
Protea Tractor Trips	5 974	4 118	-31.1%
Avalon Springs Day Visitors	10 135	11 634	14.8%
Wahnfried	2 395	1 948	-18.7%
Lords Wines	6 073	3 157	-48.0%
Nerina Guest Farm	961	225	-76.6%
Flying Feet	1 270	853	-32.8%
Eseltjiesrus Donkey Sanctuary	5 349	5 808	8.6%
Montagu Guano Caves	942	1 125	19.4%

Figure 18: Total Visitors to Langeberg Attractions, 2023



Stellenbosch Wine Valley Route

Mobile Location Data Insights

WESGRO

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

An Inspiring Place To Do Business

5. Stellenbosch Valley Wine Route

- From a sample size of 16 499 tourists who visited the Stellenbosch Wine Route, 2 376 were locals, 13 973 domestic, and 150 were international.
- Spier Hotel & Wine Farm was the most visited point of interest on the route. This was followed by Skilpadvlei and Zevenwacht Wine Estates.
- With respect to the average hours spent at the listed wine farms, Zevenwacht Wine Estate (3,1 hours) reflected the longest dwell time from Jan-Dec 2023.

Figure 19: Number of Visitors to Stellenbosch Wine Valley, 2023

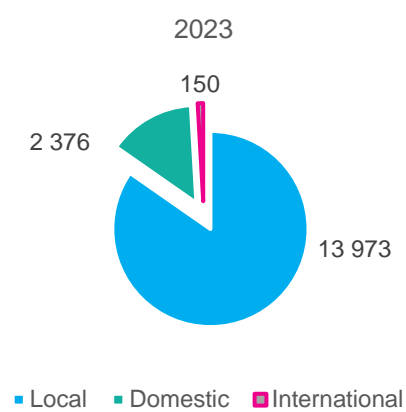


Figure 20: Top 10 Points of Interest (POIs) Visited, 2023

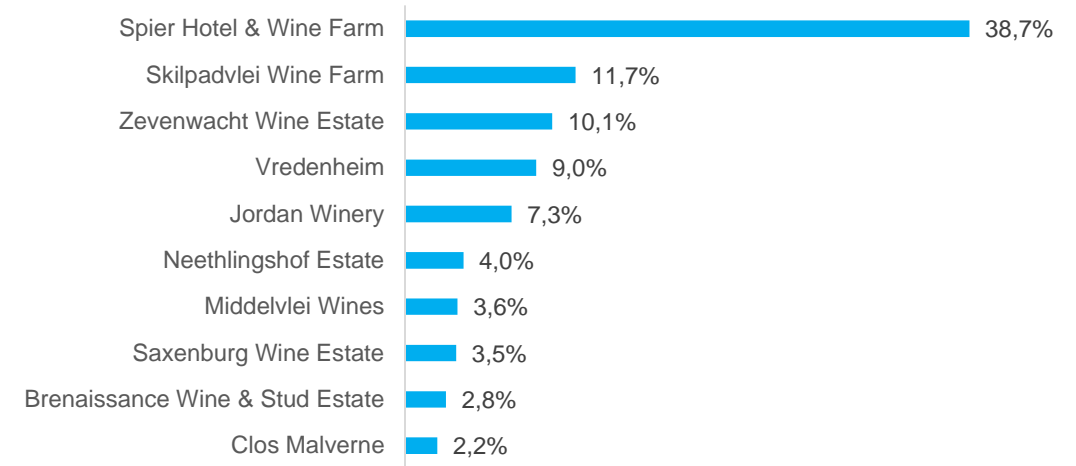
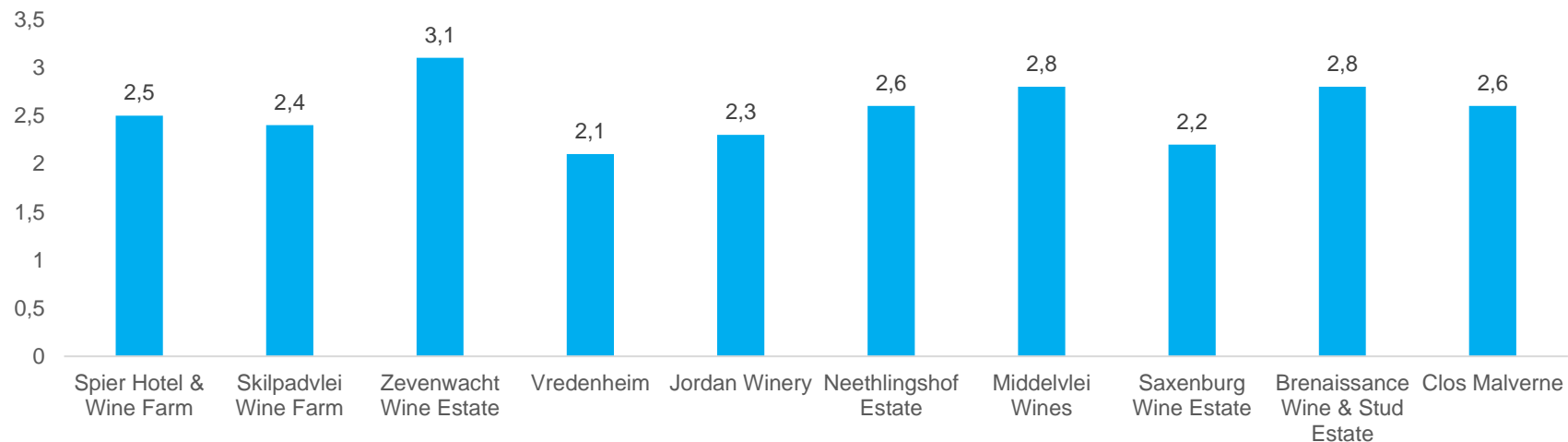


Figure 22: Average Hours Spent at Points of Interest (POIs), 2023



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, 2024

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

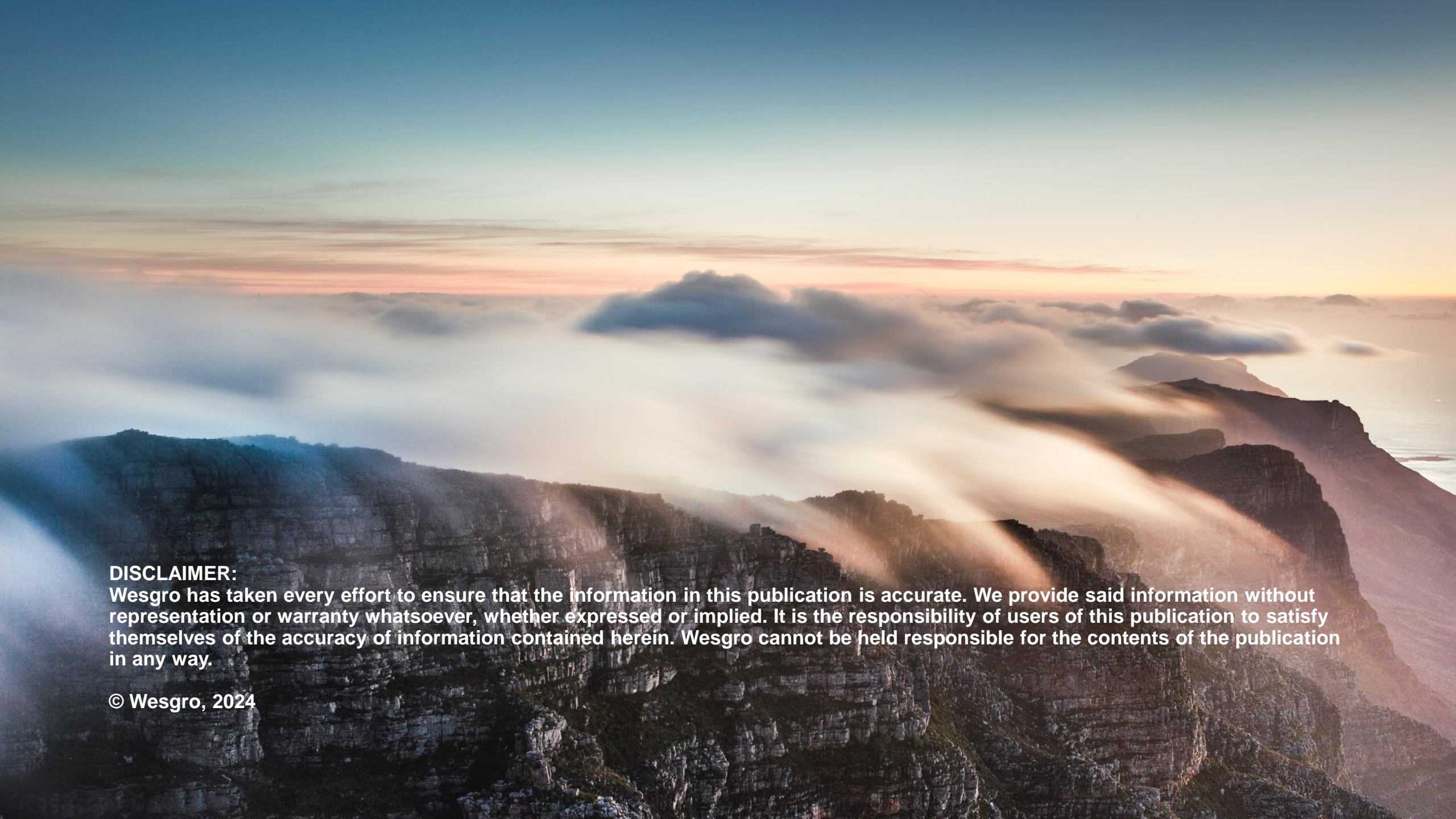
Term	Definition and Usage
Study Geography	A specific geography, defined by a boundary called a polygon.
Primary Study Geography	The largest area in the destination in which you want to capture mobile device data. For most destinations this is usually a country, province, or state.
Secondary Study Geography	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 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 as “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 the geography.

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. List of Sources

- Cape Nature
- Langeberg Municipality
- Rove Marketing powered by Near



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