



Cape Winelands Regional Trends

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1. Methodology

This report provides an overview of the tourism trends and patterns in the Cape Winelands. The findings will illustrate key visitor trends obtained from the regional visitor tracking survey.

Responses to the regional visitor tracking surveys are used as a proxy to indicate the key trends within the Western Cape and the various regions. It is important to note that absolute figures cannot be determined from these surveys, as the survey responses are a sample of the tourists into the respective tourism offices across the Western Cape, and would thus represent a sample of the visitors. Therefore, where statistically relevant absolute numbers may be given, however, a share is provided to indicate the trend. This is based on international best practice in the use of surveys within the tourism industry for determining key trends.

Definition: Tourist: refers to any visitor travelling to a place other than that of his/her own environment for more than one night, but less than 12 months and for whom the main purpose of the trip is other than the exercise of an activity remunerated for from within the place visited.



2. Participation and sample size

Between January and June 2021, a total of **472** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Cape Winelands and **845** responses were received over the same period in 2020.



3. Executive Summary

- A mixture of diverse cultural backgrounds gives the Western Cape a demographic profile quite different from that of the rest of the country. Centuries of trade created a population with genetic and linguistic links to different parts of Europe, Southeast Asia, India and Africa. Key trends and patterns observed amongst visitors to the Western Cape confirms this trend, underlining the strong and consistent demand for travel from Europe.
- The Cape Winelands region is the source of many legendary Cape wines, the produce of row upon row of grapevines, many of which were first planted hundreds of years ago. Its classic Cape-Dutch homesteads, mountainous surrounds, grand heritage and sumptuous restaurants have earned the Cape Winelands the right to call itself South Africa's culinary capital.
- The region is an extremely popular tourist destination and well visited by both international and domestic visitors.
- However, the COVID-19 pandemic has undoubtedly had a devastating impact on the tourism economy. Countries the world over have shut their borders in an attempt to curb the spread of the virus, and it has had devastating effects on the global travel industry. The United Nations World Tourism Organization (UNWTO) has reported a loss of 440 million international travellers and around US\$ 460 billion in export revenues from international tourism, over the January – June 2020 period (UNWTO, 2020).
- On 15 March 2020, the South African Government declared a national state of disaster in response to the coronavirus pandemic. A nationwide lockdown then came into effect on 26 March 2020, resulting in a complete standstill of all tourism activity until 31 May 2020. In line with government's risk adjusted strategy, limited tourism activity was introduced as of 1 June 2020.
- As a result, responses to visitors surveys at the participating Cape Winelands regions decreased by 44,14% going from a combined total of 845 visitors between January and June 2020 to a mere 475 over the same period in 2021. All attractions and regional offices in the region were closed throughout quarter two of 2020 due to the nationwide lockdown.
- However, a positive change due to the easing of restrictions in 2021 is showing a promising recovery for the region.

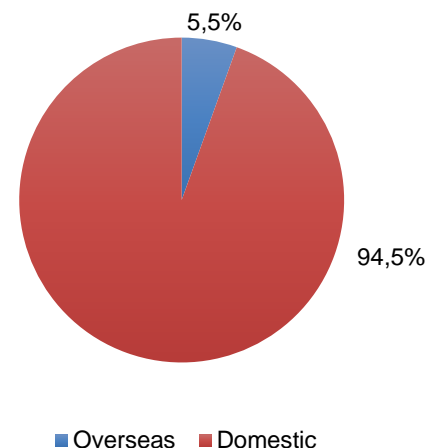


4. Cape Winelands Visitor Trends & Patterns

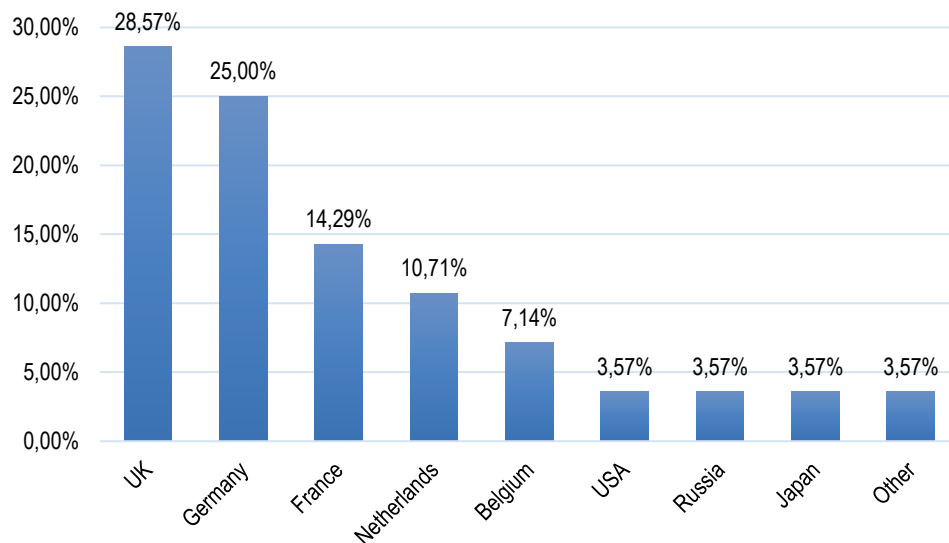
4.1 Origin of Visitors

- For the period under review in the Cape Winelands Region, international visitors made up the higher share of travellers with 94,5% as compared to 5,5% of local/domestic travellers.
- Following a similar trend as Jan-Jun 2020, traditional markets such as the United Kingdom, Germany, France, Netherlands and Belgium ranked as the region's top five international markets.
- Consistent with the Western Cape's international visitor trends, European travellers are the main drivers of tourism activity in most regions in the province including the Cape Winelands. Over 80% of all overseas visitors to the region originated from the continent.
- Despite financial and economic constraints, trends indicate that domestic travellers continue to travel. Over the period Jan – Jun 2020, the largest share of domestic travellers to the region originated from the Western Cape, which indicates that the Cape Winelands is a popular destination for locals in the province. Gauteng and KZN were amongst the top 3 most popular domestic visitors to the region.

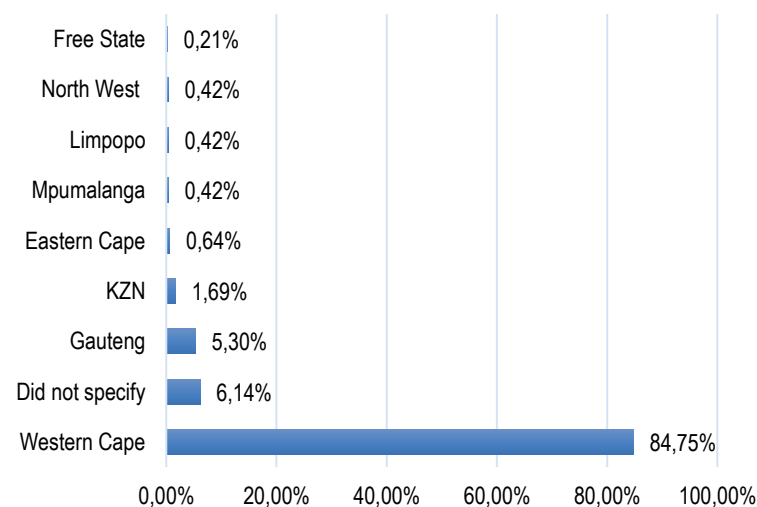
% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO THE CAPE WINELANDS, JAN-JUN 2021



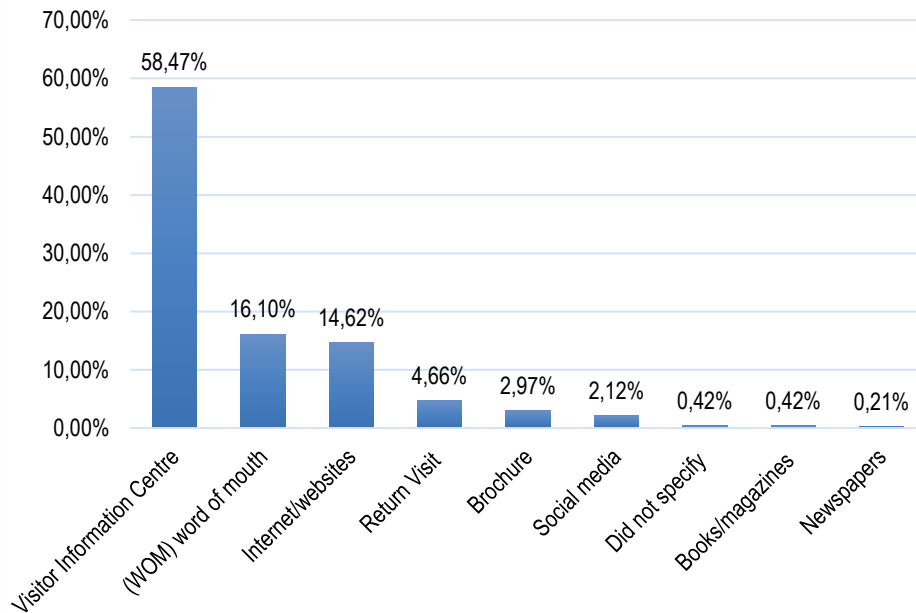
TOP INTERNATIONAL VISITORS TO THE CAPE WINELANDS, JAN - JUN 2021



% SHARE OF DOMESTIC VISITORS TO THE CAPE WINELANDS, JAN - JUN 2021

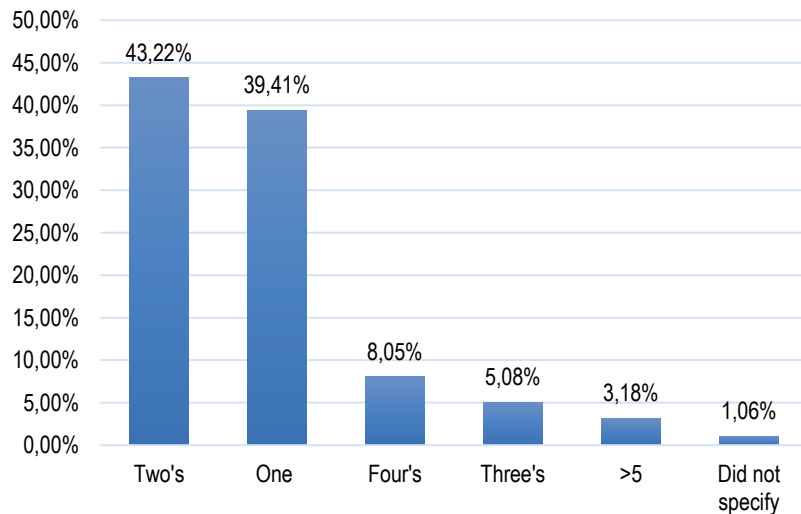


4.2 Top information sources

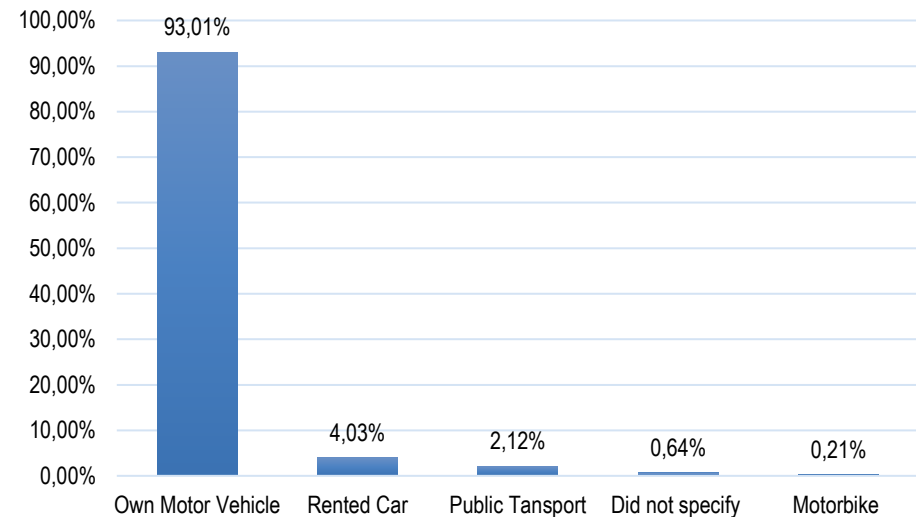


- Visitor information centre's (58,47%) Word of mouth (16,10%), Internet/websites (14,62%) and return visitors (4,66%) ranked as the top sources for obtaining information in the Cape Winelands (Jan-Jun 2021).
- Return visitors are an extremely important segment of the market that offers the potential for even greater growth and sustainability in the tourism sector for the region.
- The Cape Winelands is vast and filled with events and happenings, so travellers need to ensure they set enough time aside to enjoy the beautiful surroundings, taste wine, pick strawberries and participate in numerous events hosted by the various regions.
- As such the preferred mode of transport was people travelling with their own motor vehicles. This could be as a result of the high percentage of locals making short trips around the region.
- Being a desirable destination, the region caters for all age categories. With a majority of respondents travelling in pairs or on their own during the period.

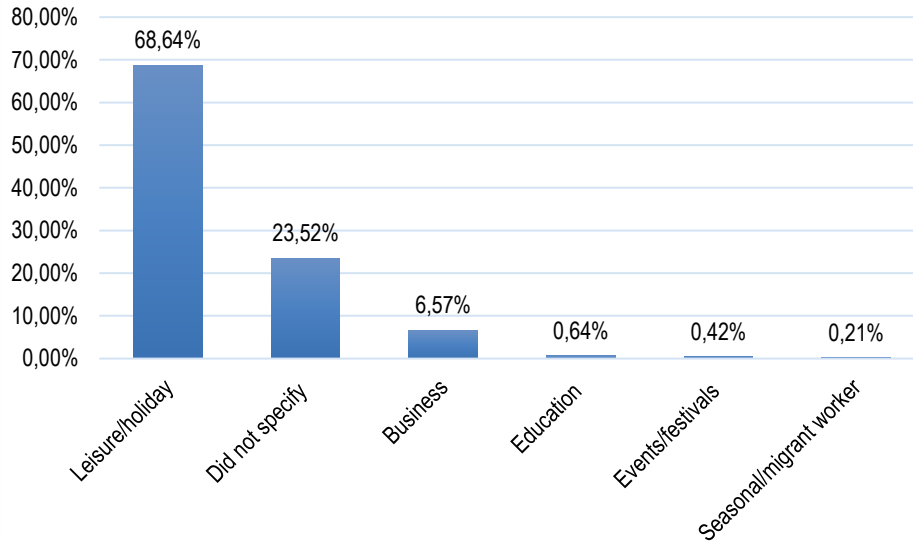
4.3 Group size



4.4 Mode of transport

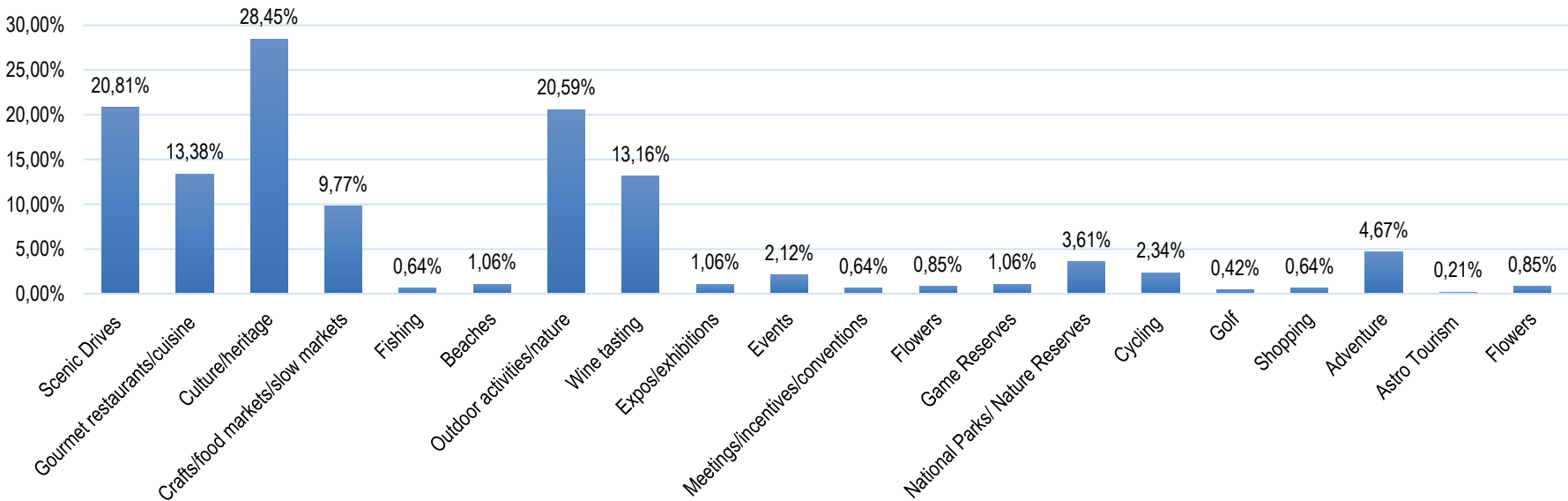


4.5 Purpose of visit

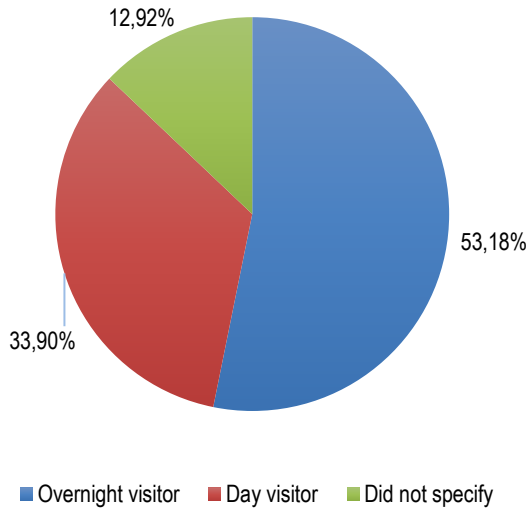


- When visiting the Cape Winelands there is an array of locations that can be visited, from Ceres, Paarl, Wellington and Tulbagh just to name a few.
- As such, the most prominent motivating factor for travel to the region was for the purpose of holiday/leisure (68,64%) as well as business (6,75%).
- Education, Business, Events as well as travelling for Sports ranked as part of the top 5 reasons for visiting the region.
- Culture/heritage, outdoor activities, scenic drives and wine tasting continue ranking as the top five activities visitors enjoy during their stay in the region.

4.6 Top Activities Undertaken in the Cape Winelands

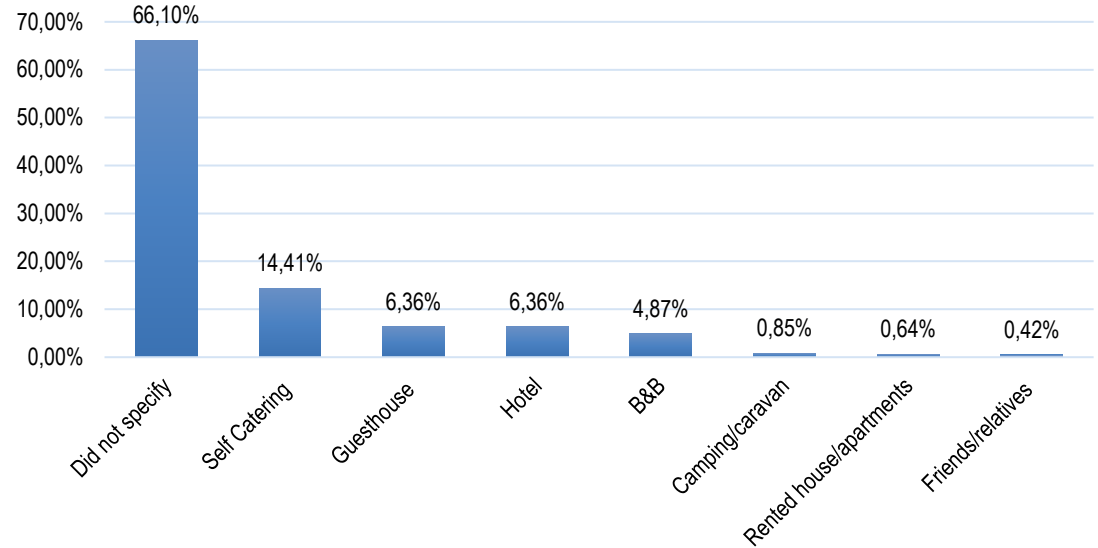


4.7 Overnight stay

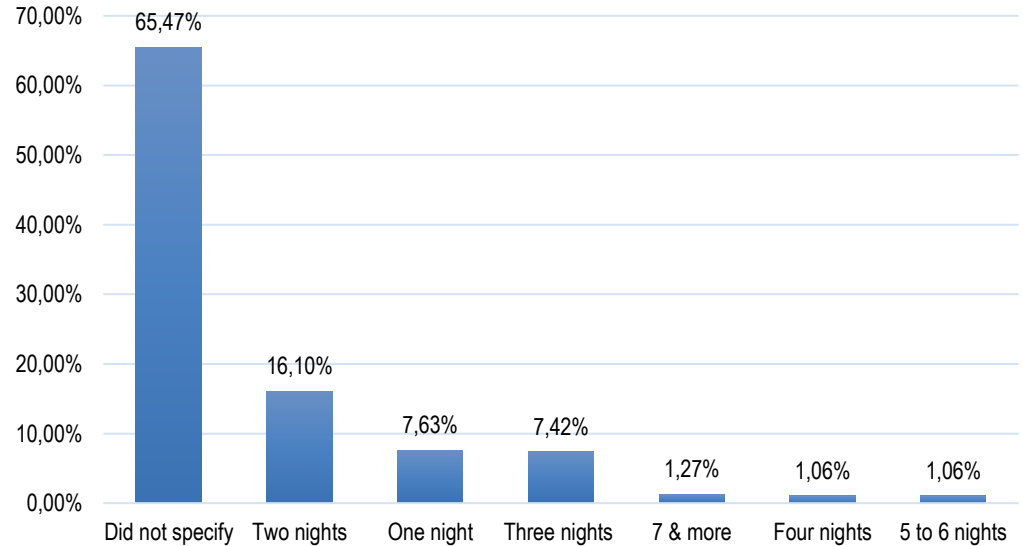


- The majority of travelers in the region were overnight visitors.
- When observing the average length of stay of visitors to the Cape Winelands, the largest share of overseas and domestic visitors indicated 2-3 nights as their length of stay in the region for the period under review.
- Self catering apartments, guest houses and hotels were the most popular accommodation choices for overnight visitors in the region.

4.8 Accommodation Usage



4.9 Average Length of Stay



5. Langeberg Regional Trends and Patterns

- The participating Cape Winelands attractions in the three towns of Roberston, Montagu and McGregor recorded a combined total of 12 001 visitors between January and June 2020 with an increase of (89,02%) to 22 684 over the same period in 2021;
- The steady flow in visitors throughout the period indicates a strong and growing tourism sector in the Langeberg area, however the changes experienced due to the Covid-19 season have been quite high throughout attractions within the whole country and province.
- All attractions in the region were closed throughout quarter two of 2020 due to the nationwide lockdown, which took effect on 26 March 2020. The easing of restrictions in 2021 made a positive impact on the various towns as well as all the participating attractions depicted in the table below.

	Jan 2021	Feb 2021	Mar 2021	Apr 2021	May 2021	Jun 2021
Nerina Guest Farm	54	47	48	54	23	10
Protea Tractor Trip	554	117	477	440	342	232
Wahnfried	14	134	142	159	103	93
Montagu Museum	c	l	o	s	e	d
Birds Paradise	952	625	811	937	731	461
Flying Feet	0	0	0	163	63	67
Eseltjiesrus Donkey Sanctuary		168	265	357	150	164
Viloensdrift River Cruises	1046	1352	1492	1830	959	635
Avalon Springs	0	730	1224	1049	761	534
Lords Wines	40	180	950	180	550	215

6. Acknowledgements

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- *Tulbagh Tourism*
- *Ceres Tourism*
- *Wellington Tourism*
- *Robertson Tourism*
- *Montagu Tourism and*
- *McGregor*

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