

Cape Winelands

May 2018

Executive Summary

This destination fact sheet provides key trade and investment related statistics for the Cape Wineland district. Specifically, it shows the Cape Winelands area, employment, trade and investment trends with the rest of the world. The key highlights are provided below:

Economy

- The Cape Winelands GDP grew from ZAR35.21bn in 2007 to ZAR43.79bn in 2016.
- The Drakenstein municipality was the largest contributor to the Cape Winelands district GDP in 2016 valued at ZAR14.35bn.
- The wholesale and retail trade, catering and accommodation sector was the largest employer with 85 339 people.
- In 2016 the finance, real estate and business services sector was the largest contributor towards the Cape Winelands GDP, accounting for 24.30%.
- The food, beverages and tobacco sub-sector was the largest contributor to Cape Winelands manufacturing sector, with a market share of 42 percent.
- The wholesale and retail trade sub-sector was the largest contributor to Cape Winelands services sector, accounting for 25%.

Trade

- In 2017 the Cape Winelands was a net exporter of goods, the region exported goods to the value of ZAR28.93bn and imported goods valued at a ZAR28.27bn, representing a trade surplus of ZAR660m.
- The United Kingdom was the largest destination market for the Cape Winelands in 2017, accounting for 13.29% of exports, with a value of ZAR3.92bn.
- The leading source market for the Cape Winelands was Saudi Arabia, accounting for 22.15%, with a value of ZAR6.26bn.
- Wine was the leading export product from the Cape Winelands, accounting for 22.61%, with a value of ZAR6.01bn. Citrus fruit and grapes ranked second and third, accounting for 13.86% (ZAR4.01bn) and 12.13% (ZAR3.51bn) respectively.

Investment

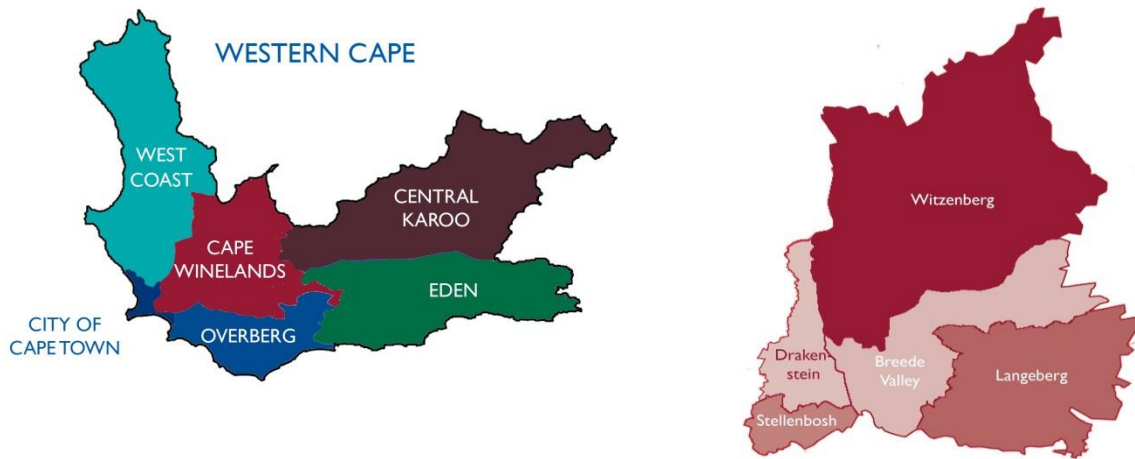
- According to FDI markets, the Cape Winelands attracted 9 FDI projects valued at ZAR3.41bn. All FDI projects were located in the town of Stellenbosch. There were furthermore 7 investments facilitated by the Wesgro Investment team into the Winelands.
- There were 19 FDI outward projects from the Cape Winelands valued at ZAR9.36bn.

Tourism

- German visitors represented the largest share of overseas visitors to the Cape Winelands district in 2017, accounting for 17%, followed by the United Kingdom (13%) and the United States (17.5%).
- Visitors to Paarl and Wellington attracted a similar age segment, with most visitors between the age group of 36-50 years; while Tulbagh attracted a stronger share of travellers from the senior and retiree market (51-70 years; 34.6%).

1. Area

The Cape Winelands District is situated in the Western Cape Province and is one of six districts in the province. The district has five local municipalities: Stellenbosch, Drakenstein, Witzenberg, Breede Valley and Langeberg. The Cape Winelands District is the second largest centre of economic activity in the Western Cape after the City of Cape Town. The region is famous for its spectacular scenery of beautiful mountains, valleys, as well as wine and fruit estates and attracts local and foreign tourists. The region is large, comprising an area over 22,309 km², with a population of 895 529 people.



The table below shows the key indicators for the Cape Winelands district. The literacy rate is used to indicate a minimum education level attained. A simple definition of literacy is the ability to read and write, but the strict definition is interpreted as the successful completion of a minimum of 7 years of formal education. The districts literacy rate improved by 8.4 percent from 73.3 percent in 2007 to 81.7 percent in 2011.

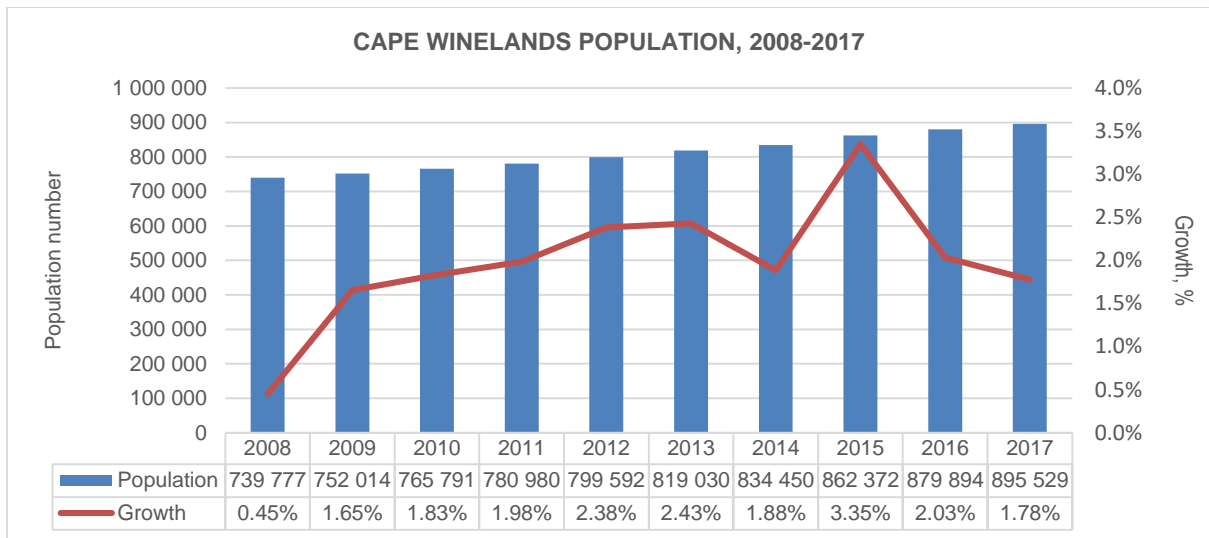
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CAPE WINELANDS KEY INDICATORS	
Executive Mayor	Alderman Dr H von Schilcht
Population (2017)	895 529
Population Density (2015)	35.8/km ²
GDP (2016)	ZAR43.79bn
GDP Growth (2016)	0.54%
Literacy rate (2011)	81.7%
Unemployment rate (2013)	10.66%
Ethnic groups (2015)	Coloured (61.5%), Black African (27.1%), White (11%) & Asian (0.4%)
Languages (2011)	Afrikaans (72.1%), Xhosa (16%), English (4.2%), Sotho (1.8%) & Other (0.4%)
Gini Coefficient (2014)	0.63
Human Development Index (2010 HDI)	0.61

Source: Quantec, 2018; Provincial Treasury, 2018; Cape Winelands District, 2018

2. Population

With a population of 895 529 in 2017, the Cape Winelands municipal area was the second most populous district municipality in the Western Cape after the City of Cape Town, accounting for 13.6% of the Western Cape's population. The Cape Winelands population is estimated to have grown by an annual average growth rate of 2.38% between 2013 and 2017.



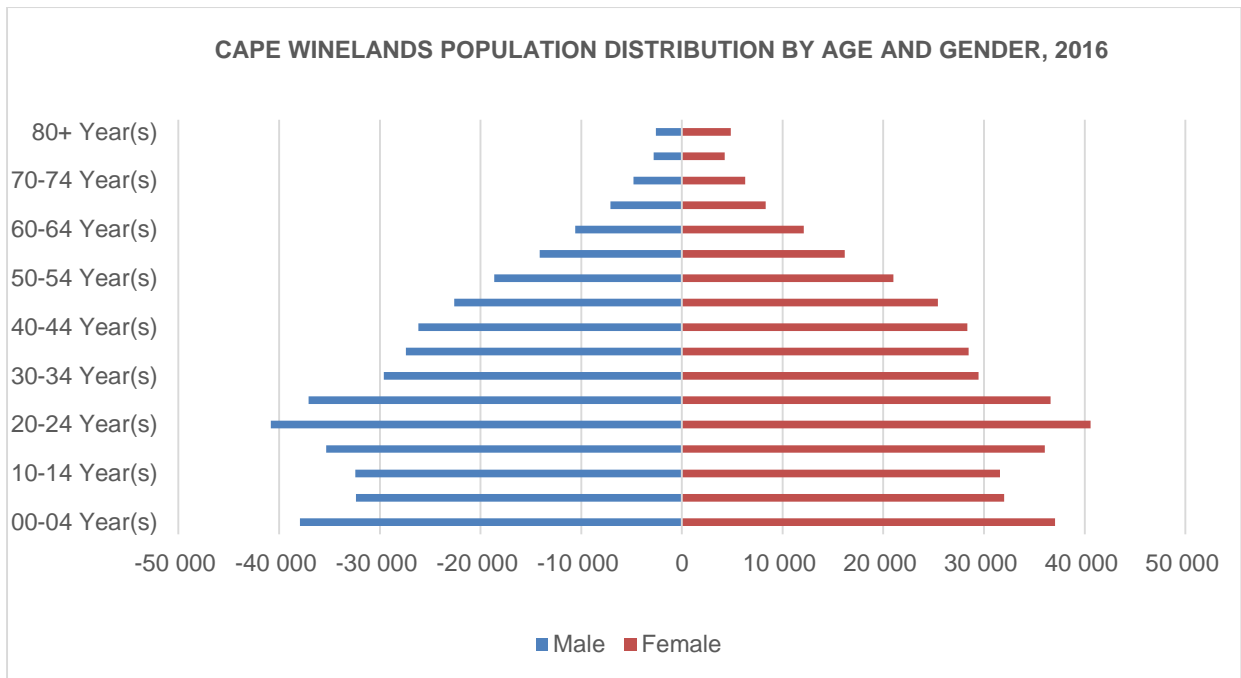
Source: Quantec, 2018

The table below shows Cape Winelands population breakdown by different ethnic groups. In 2017, the Coloured population represented the largest ethnic group, accounting for 61.47%, followed by the Black African population and White population, accounting for 27.11% and 11.04% respectively.

CAPE WINELAND'S POPULATION BREAKDOWN BY GROUP (2015-2017)					
GROUP	2015	2016	2017	% SHARE 2017	% CHANGE 2013-2017
Black African	227 621	235 610	242 822	27,11%	3,71%
Coloured	532 544	542 154	550 502	61,47%	2,23%
Indian or Asian	3 130	3 259	3 369	0,38%	4,14%
White	99 078	98 872	98 835	11,04%	0,15%
TOTAL	862 372	879 894	895 529	100,00%	2,38%

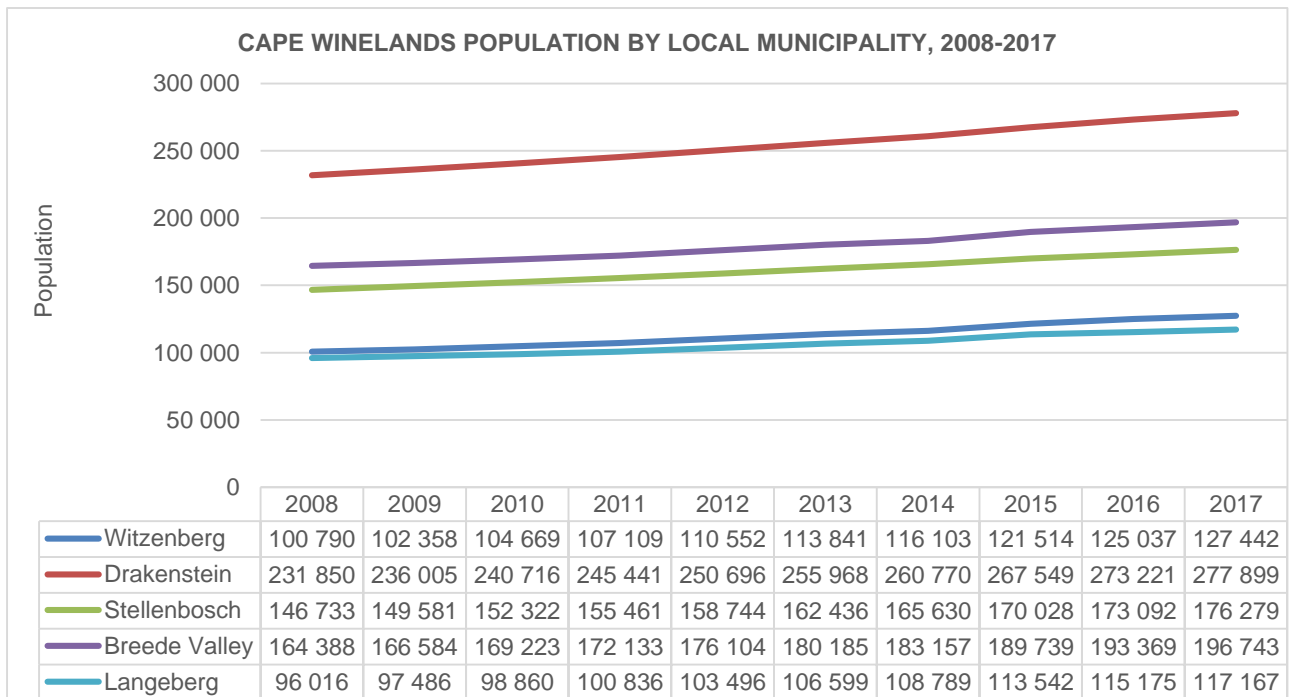
Source: Quantec, 2018

The figure below shows the Cape Winelands district population in 2017. According to Quantec, 26% of Cape Winelands population was below the working age of 15 and the region had one of lowest child dependency ratio. Meaning there are less people dependent on those that are of a working age. The majority of the population that reside in the region are between the ages of 20 and 24 years of age.



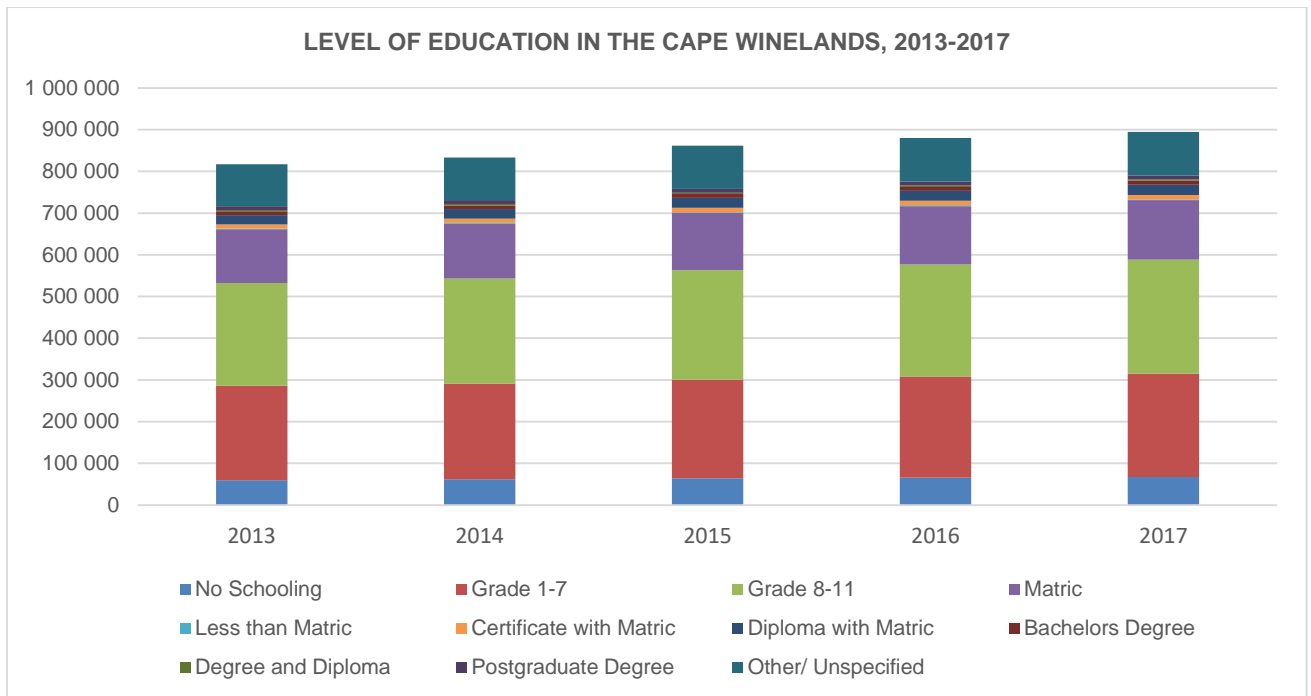
Source: Quantec, 2018

The figure below shows the Cape Winelands population for the period of 2008 to 2017. Drakenstein and Breede Valley ranked as the most populous local municipalities respectively over the 2008 to 2017 period.



Source: Quantec, 2018

Education levels have a direct link to economic development and quality of life enjoyed by the residents of a particular area. This is because education level influence the skills profile and the employability and innovation of a population. The Cape Wineland’s educational output has been increasing from 2013 to 2017. The number of students with postgraduate degrees increased by an average annual growth rate of 1.66% from 2014 to 2017 while the number of students that obtained a bachelor’s degree increased by 1.47% during the same period. Furthermore, the University of Stellenbosch is pioneering a project, which seeks to position the town as an innovation district. Through the project, the town plans to design an innovative, connected, sustainable space and community.



Source: Quantec, 2018

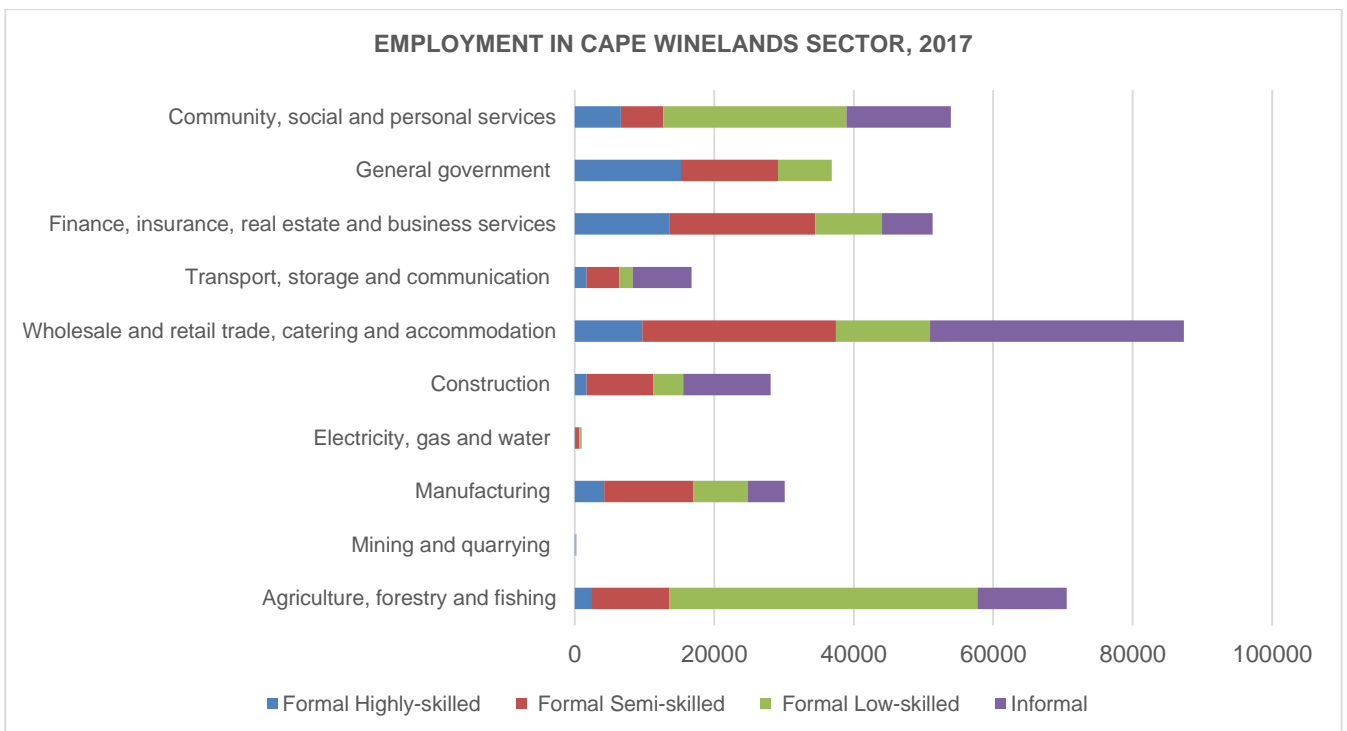
3. Employment

The table below provides a snapshot of indicators for employment in the Cape Winelands in 2016. The unemployment rate at this time was 10.66%, with 376 029 people employed from a working age population of 479 459 people.

EMPLOYMENT INDICATORS CAPE WINELANDS, 2016	
Population aged 15-64 years (2017)	479 459
Labour force participation rate (2016)	68
Employed (2016)	376 029
Unemployed (2016)	44 941
Not economically active (2016)	189 568
Unemployment rate (2016)	10.66

Source: Quantec, 2018

Since the onset of the drought, employment in the agricultural sector has shrunk considerably resulting in farmworker employment losses ranging between 28 000 and 35 000 jobs (BFAP, 2018). The Cape Winelands' wholesale and retail trade, catering and accommodation sector was the largest employer with 87 339 people, followed by agriculture, forestry and fishing and the community, social and personal services sectors employing 70 542 people and 53 914 people respectively.



Source: Quantec, 2018

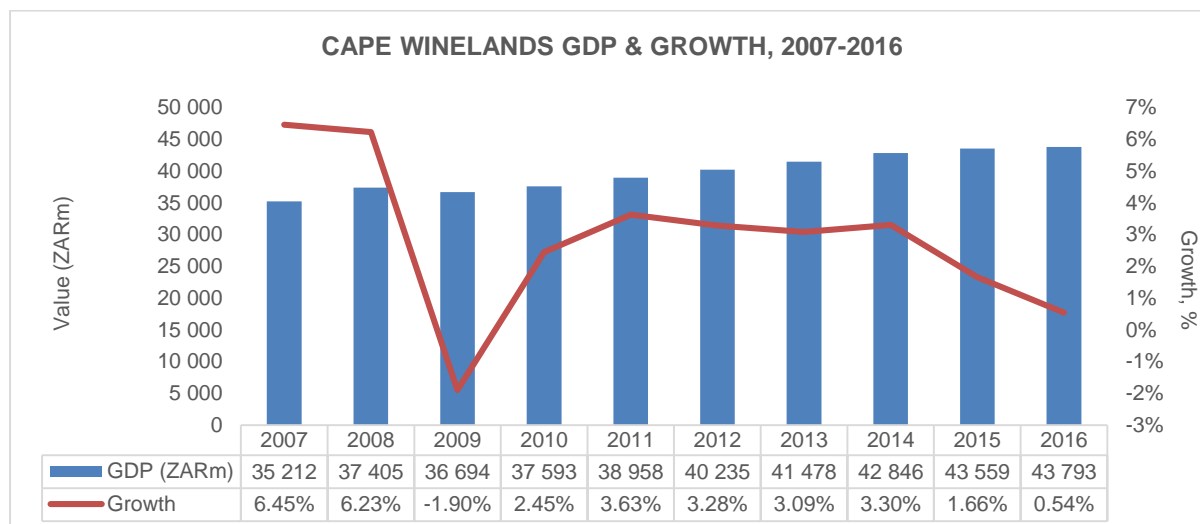
4. Economic Overview

Agriculture forms the backbone of the Cape Winelands District Municipality's economy, with approximately 80 000 hectares of cultivated and irrigated areas dedicated to the production of mostly deciduous fruit (apricots, nectarines, pears and apples), table grapes, wine grapes and vegetables. Leading agricultural contributions to the district economy originate from the Witzenberg and Drakenstein municipalities.

Nearly 70% of South Africa's wine comes from the Cape Winelands. A good percentage of this wine is exported and the wine estates themselves attract tourists with wine tasting and restaurants. More than one third (33%) of all agricultural products in the Western Cape are produced within the Cape Winelands. Manufacturing is mainly

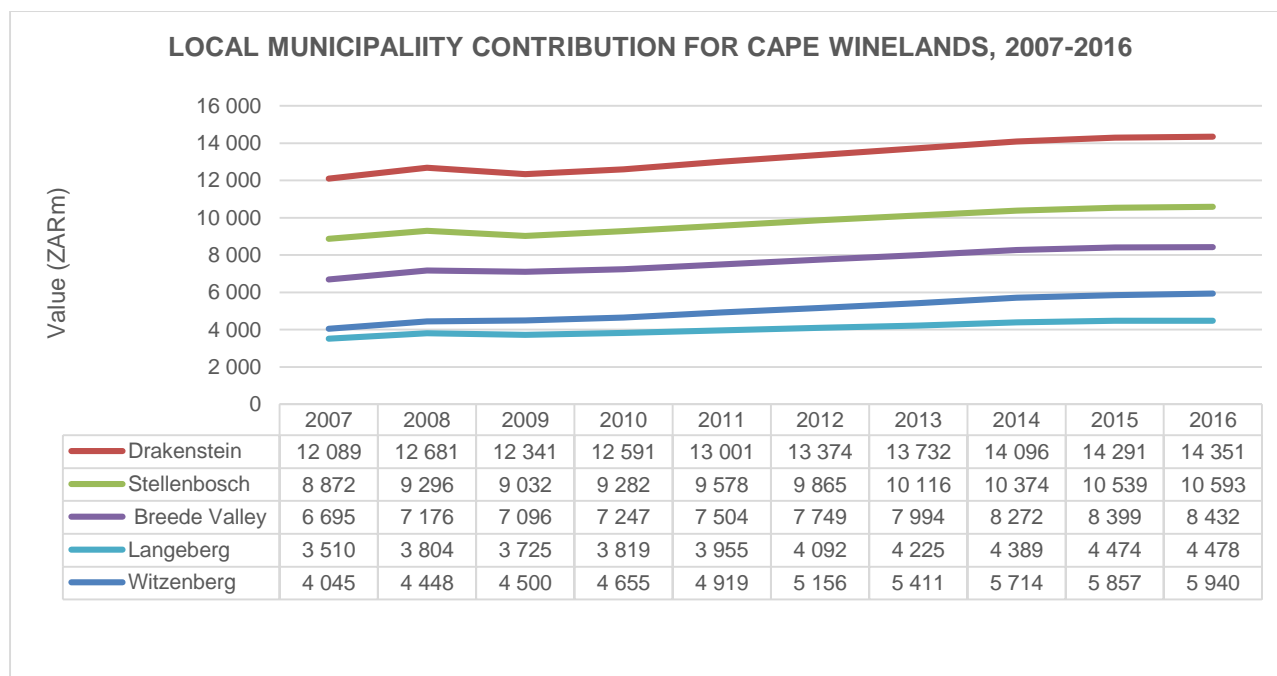
concentrated on processing grapes and fruit into wine, juice, brandy, as well as dried and tinned fruit products. Dairy manufacturing rose farming and thoroughbred horses are also present in the region.

Barring 2016, over the reviewed period the Cape Winelands GDP has been steadily increasing, achieving an average growth rate of 2.87%.



Source: Quantec, 2018

The figure below shows the contribution share of Cape Winelands local municipalities to the regional GDP for the period 2007 to 2016. The Drakenstein municipality was the largest contributor to the district GDP in 2016 valued at ZAR14,35bn, Stellenbosch and Breede Valley were the second and third largest contributors to Cape Winelands district, valued at ZAR10.59bn and ZAR8.43bn respectively.



Source: Quantec, 2018

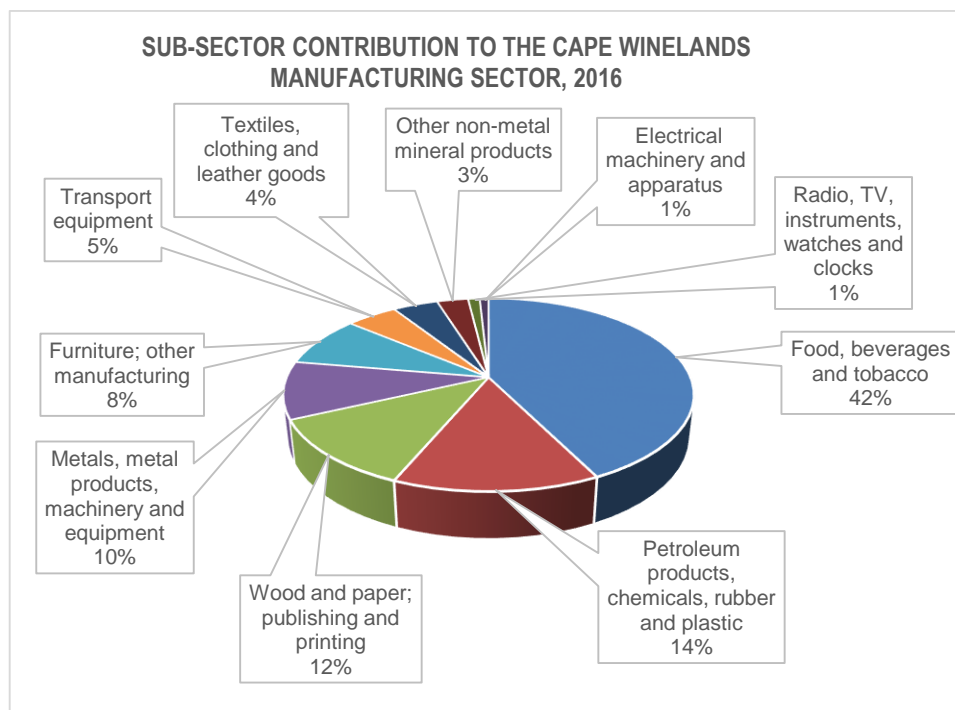
The composition of the Cape Winelands economy in terms of GDP has not changed over the past five years. In 2016, the finance, real estate and business services sector was the largest sector in the Cape Winelands, accounting for 23.4% of GDP, with a value of ZAR10.641bn. The wholesale and retail trade and the catering and accommodation sector and manufacturing sector were the second and third largest contributors to the Cape Winelands GDP in 2016, accounting for 17.7% (ZAR7.8bn) and 15.1% (ZAR6.6bn) respectively.

CAPE WINELANDS GDP BY SECTOR, 2012-2016						
SECTOR	VALUE 2012 ZARm	VALUE 2013 ZARm	VALUE 2014 ZARm	VALUE 2015 ZARm	VALUE 2016 ZARm	% SHARE OF WC GDP, 2016
Finance, insurance, real estate and business services	9 046	9 442	9 804	10 285	10 640	9,01%
Wholesale and retail trade, catering and accommodation	6 873	7 130	7 354	7 575	7 763	12,35%
Manufacturing	6 814	6 749	6 725	6 684	6 612	11,25%
General government	4 265	4 362	4 701	4 544	4 127	9,78%
Transport, storage and communication	4 066	4 229	4 337	4 364	4 409	11,14%
Community, social and personal services	3 447	3 582	3 733	3 784	3 828	14,75%
Construction	3 062	3 170	3 243	3 300	3 341	19,62%
Agriculture, forestry and fishing	1 921	2 062	2 189	2 269	2 337	15,25%
Electricity, gas and water	668	675	679	672	661	9,49%
Mining and quarrying	73	75	81	80	75	7,92%
TOTAL	40 235	41 478	42 846	43 559	43 793	11,30%

Source: Quantec, 2018

The figure below shows the contribution share of Cape Winelands' manufacturing sub-sectors to the district's GDP for 2016. The figure shows that:

- Food, beverages and tobacco sub-sector was the largest contributor to Cape Winelands' manufacturing sector, with 42% market share followed by;
- Petroleum products, chemicals, rubber and plastics Metals (14%);
- The wood and paper, publishing and printing (12%).

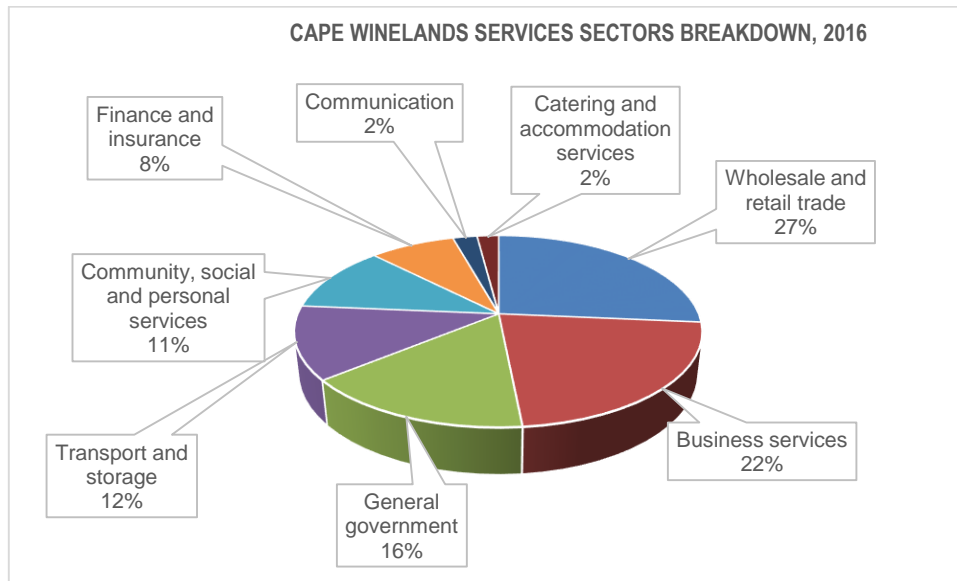


Source: Quantec, 2018

The figure below shows the contribution share of the Cape Winelands services sub-sectors to the regions services sector for the period 2016. The figure shows that:

- The wholesale and retail trade sector sub-sector was the largest contributor to Cape Winelands services sector, the business services sector accounted for 27% followed by,

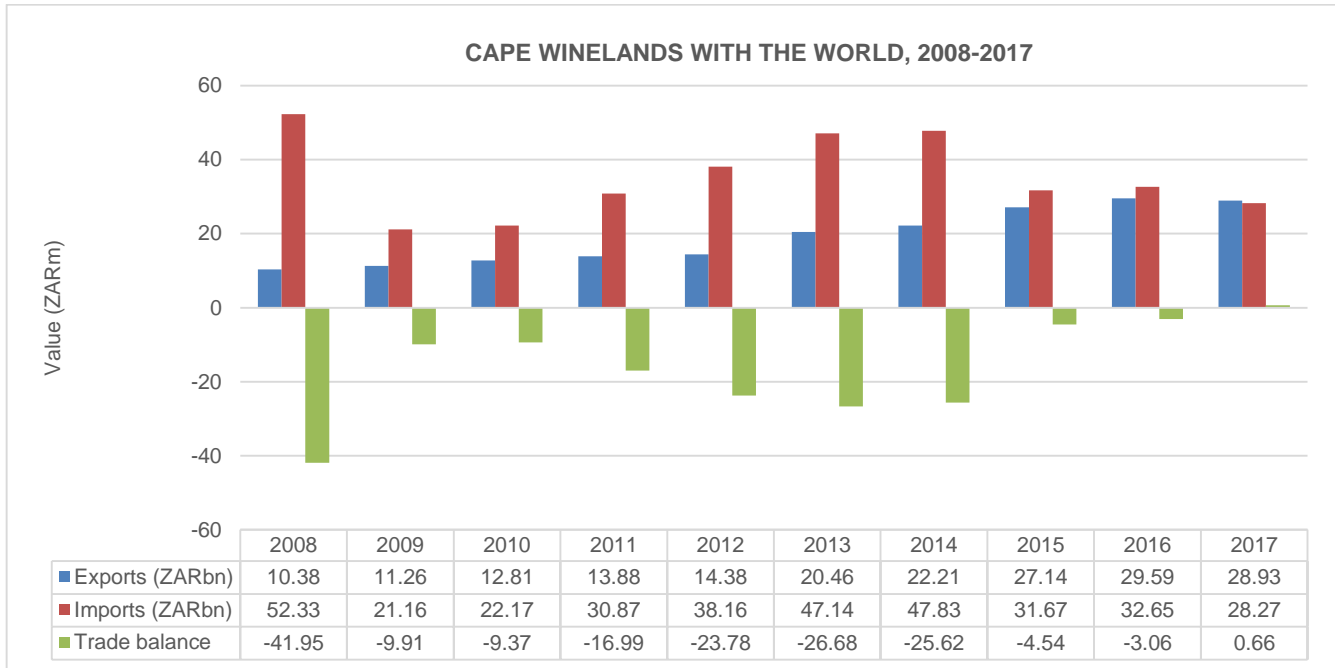
- The business services sector, accounting for 22% and
- General government services sector accounting for 16%.



Source: Quantec, 2018

5. Trade

The figure below shows Cape Winelands global trade for the period 2008 to 2017. The district exported goods to the value of ZAR29.59bn in 2016 compared to ZAR28.93bn in 2017, representing a decline of 2.2%, while imported goods were valued at ZAR32.65bn in 2016 compared to ZAR28.27bn in 2017, decreasing by 13.4%.



Source: Quantec, 2018

The United Kingdom was the largest export market for the Cape Winelands in 2017, accounting for 13.28%, with a value of ZAR3.8bn. The Netherlands and Namibia ranked second and third valued at ZAR3.5bn and ZAR2.1bn respectively. Other top export markets included Germany (ZAR1.7bn), Botswana (ZAR1.2bn) and the United States (ZAR1.2bn).

The district exported 23.29% of the Western Cape's total exports in 2017.

TOP 10 DESTINATION MARKETS FOR CAPE WINELANDS EXPORTS, 2017			
RANK	SOURCE MARKETS	VALUE 20157 (ZARbn)	% GROWTH 2013-2017
1	United Kingdom	3,84	17,90%
2	Netherlands	3,49	9,20%
3	Namibia	2,14	-
4	Germany	1,67	11,07%
5	Botswana	1,23	-
6	United States	1,23	28,98%
7	United Arab Emirates	1,09	24,27%
8	Canada	1,07	44,99%
9	China	1,04	7,24%
10	Russian Federation	0,91	9,36%
TOTAL EXPORTS		28.93	15.97

Source: Quantec, 2018

The leading import market for the Cape Winelands district was Saudi Arabia, accounting for 22.15%, with a value of ZAR6.26bn. The Angola and Nigeria rank second and third valued at ZAR3.03bn and ZAR2.92bn respectively. Other top import markets include the India (ZAR2.61bn), China (ZAR1.1bn) and Netherlands (ZAR970m).

The district imported 15.28% of the Western Cape's total imports in 2017.

TOP 10 SOURCE MARKETS FOR CAPE WINELANDS IMPORTS, 2017			
RANK	DESTINATION MARKETS	VALUE 2017 (ZARbn)	% GROWTH 2013-2017
1	Saudi Arabia	6,26	-64.34%
2	Angola	3,03	-49.05%
3	Nigeria	2,92	-53.04%
4	India	2,61	-11.09%
5	China	1,11	96.81%
6	Netherlands	0,97	46.65%
7	Germany	0,91	-11.71%
8	Singapore	0,76	107.04%
9	United Arab Emirates	0,74	38.72%
0	United Kingdom	0,70	-26.41%
TOTAL IMPORTS		28,27	-45,65

Source: Quantec, 2018

The top 5 traded products for the top 5 export markets for the Cape Winelands district are shown below:

United Kingdom

- Wine of fresh grapes (ZAR798m)
- Grapes (ZAR574m)
- Apricots, cherries, peaches (nectarines), plums and sloes, fresh (ZAR382m)
- Citrus fruits (ZAR375m)
- Other Fruits (ZAR334m)

Netherlands

- Grapes (ZAR1.2bn)
- Citrus fruit (ZAR683m)
- Wine of fresh grapes (ZAR589m)
- Apricots, cherries, peaches (including nectarines) plums and sloes (ZAR310m)
- Apples, pears and quinces (ZAR287m)

Namibia

- Wine of fresh grapes (ZAR427m)
- Fruit juices (ZAR228m)
- Undenatured ethyl alcohol (ZAR215m)
- Other fermented beverages (ZAR149m)
- Sauces and preparations thereof (ZAR101m)

Germany

- Wines of fresh grapes (ZAR911m)
- Fruit, nuts and other edible parts of nuts (ZAR198m)
- Grapes (ZAR169m)
- Undenatured ethyl alcohol (ZAR107m)
- Apples, pears and quinces (ZAR72m)

Botswana

- Fruit juices (ZAR261m)
- Other fermented beverages (ZAR125m)
- Milk and cream (ZAR119m)
- Sauces and preparations thereof (ZAR119m)
- Wine of fresh grapes (ZAR81m)

The Cape Winelands exported 23.21% of Western Cape's total exports in 2017. The Cape Winelands top ten exports amounted to 77% of total exports from the district in 2017. Wine was the leading export product from the Cape Winelands, accounting for 21%, with a value of ZAR6.01bn. Citrus fruit and grapes, ranked second and third, accounting for 14% (ZAR4bn) and 12% (ZAR3.51bn) respectively.

The Cape Winelands' top ten imports accounted for 78% of total imports from the district in 2017. Crude petroleum oils, was the leading import product accounting for 44.98%, with a value of ZAR12.72bn. Refined petroleum oil and wheat and meslin ranked second and third accounting for 22.68% and 2.21% respectively.

TOP 10 EXPORT PRODUCTS FROM THE CAPE WINELANDS DISTRICT, 2017				TOP 10 IMPORT PRODUCTS TO THE CAPE WINELANDS DISTRICT, 2017			
RANK	PRODUCT	VALUE, 2017 (ZARbn)	% GROWTH, 2013- 2017	RANK	PRODUCT	VALUE, 2017 (ZARbn)	% GROWTH, 2014- 2015
1	Wine	6,01	4,95%	1	Crude petroleum oils	12,72	-5,21%
2	Citrus fruit	4,01	27,54%	2	Refined petroleum oils	6,41	6,59%
3	Grapes	3,51	22,59%	3	Wheat and meslin	0,63	-0,30%
4	Apples, pears and quinces	2,19	17,26%	4	Fruit juices	0,55	9,19%
5	Fruit, nuts and other edible parts of plants	1,81	7,29%	5	Maize	0,48	103531,82%
6	Fruit juices	1,61	17,48%	6	Rice.	0,45	3282,04%
7	Undenatured ethyl alcohol	0,95	9,30%	7	Oil-cake	0,29	28,68%
8	Apricots, cherries, peaches	0,94	28,77%	8	Self-adhesive plates	0,23	35,53%
9	Other fruit, fresh	0,71	39,35%	9	Undenatured ethyl alcohol	0,20	2,94%
10	Other fermented beverages	0,57	18,24%	10	Harvesting or threshing machinery	0,19	43,59%
TOTAL EXPORTS		28,93	15,97%	TOTAL IMPORTS		28,27	-3,82%

Source: Quantec, 2018

6. Investment

The table below shows the global inward FDI into the Cape Winelands. Between January 2003 and November 2017 the Cape Winelands attracted 9 FDI projects, valued at ZAR3.4bn and creating 221 jobs. All FDI projects were into the town of Stellenbosch.

FDI INTO THE CAPE WINELANDS, JANUARY 2003-NOVEMBER 2017							
DATE	INVESTING COMPANY	SOURCE COUNTRY	DESTINATION CITY	INDUSTRY SECTOR	SUB-SECTOR	CAPEX (ZARm)	JOBS
Apr 2017	Nedbank Private Wealth (Fairbairn Private Bank)	London	Stellenbosch	Financial Services	Investment management	144,06	21,00
Jan 2017	Liquorice	Paris	Stellenbosch	Business Services	Advertising, PR, & related	89,05	15,00
Jul 2012	Enza Zaden	Enkhuizen	Stellenbosch	Biotechnology	In-Vitro diagnostic substances	557,89	50,00
Nov 2011	deVere & Partners (deVere Group)	Zurich	Stellenbosch	Financial Services	Corporate & investment banking	144,06	21,00
Aug 2011	Genetwister Africa	Wageningen	Stellenbosch	Chemicals	Pesticide, fertilisers & other agricultural chemicals	134,89	35,00
Apr 2011	Artificial Life	Hong Kong	Stellenbosch	Communications	Wireless telecommunication carriers	98,22	16,00
Feb 2011	Juwi	Mainz	Stellenbosch	Alternative/Renewable energy	Wind electric power	2 036,44	22,00
May 2010	Genetwister Technologies	Wageningen	Stellenbosch	Chemicals	Pesticide, fertilisers & other agricultural chemicals	134,89	35,00
Sep 2004	Alltech	Nicholasville (KY)	Stellenbosch	Chemicals	Paints, coatings, additives & adhesives	65,48	6,00
TOTAL						3 404,99	221,00

Source: FDI Intelligence, 2018

The table below shows the global outward FDI from the Cape Winelands from January 2003 to November 2017. There were 19 outward FDI projects from the region with some of the companies investing in various projects and markets. During the said period the region invested in projects valued at ZAR9.4bn creating a total of 2 997 jobs.

FDI FROM THE CAPE WINELANDS, JANUARY 2003-NOVEMBER 2017							
DATE	INVESTING COMPANY	SOURCE	DESTINATION COUNTRY	SECTOR	SUB-SECTOR	CAPEX (ZARm)	JOBS
Sep-17	Luno	Stellenbosch	United Kingdom, Singapore and Indonesia	Software & IT services	Software publishers, except video games	230,49	56
15-Jun	Origin Wine	Stellenbosch	United States and Sweden	Food, Beverages & Tobacco	Wineries	497,65	22
May-15	PSG Konsult	Stellenbosch	Namibia	Financial Services	Investment management	144,06	18
15-Apr	Mediclinic Middle East	Stellenbosch	UAE	Life sciences	General medical & surgical hospitals	3 168,99	800
14-Oct	Wines of South Africa	Stellenbosch	Hong Kong	Food, Beverages & Tobacco	Wineries	248,83	22
14-Jun	Distell Group	Stellenbosch	Angola	Food, Beverages & Tobacco	Breweries & distilleries	2 941,38	222
Jan 2014	Mxit	Stellenbosch	India	Software & IT services	Internet publishing & broadcasting & web search	107,39	52
May 2013	Rainbow Chicken	Stellenbosch	Zambia	Food & Tobacco	Animal production	421,69	429
Feb 2012	Entersekt	Stellenbosch	United Kingdom	Software & IT services	Software publishers, except video games	159,77	97
Jan 2011	Booker Tate	Stellenbosch	Sri Lanka	Food & Tobacco	Sugar & confectionary products	1 440,57	400
Total						9 360,83	2 118,00

Source: FDI Intelligence, 2018

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The table below shows a list of projects that were facilitated by Wesgro's Investment Unit.

INVESTMENT PROJECTS INTO THE REGION THAT WERE FACILITATED BY WESGRO				
NUMBER	COMPANIES NAME	SUB-SECTOR	CAPEX (ZARm)	JOBS
1	Riviera Today	Services	5	30
2	Groot Parys Estate (Pty) Ltd	Other tourism	15	5
3	Turnaround Investment	Accommodation	2	5
4	Breede Valley Fruit Processors	Juice Manufacture	1	10
5	Nouvelle Mushrooms	Agriculture	152	15
6	Montagu Dried Fruit	Agri processing	20	70
7	Cence	Community Development	110	250
TOTAL			305	385

Source: FDI Intelligence, 2018

6.1 Selected Initiatives & Opportunities in Cape Winelands

Selected initiatives in the Winelands are shown in the table below:

SELECTED ON-GOING AND APPROVED INITIATIVES IN THE CAPE WINELANDS		
INITIATIVE	OVERVIEW	PROJECT PHASE
"Free Internet": Free Wi-Fi hotspots	A public-private partnership (PPP) between the Stellenbosch Municipality and the social media network MXit has been established with the goal of providing free internet (Wi-Fi hotspots) to promote learning and communication for residents in the municipality.	Select hotspots operating. More hotspots to be created.

SELECTED ON-GOING AND APPROVED INITIATIVES IN THE CAPE WINELANDS		
INITIATIVE	OVERVIEW	PROJECT PHASE
Paarl CBD upgrade	Paarl is the economic centre of the Drakenstein municipality housing four major international companies, for example KWV and Heinz; and as a result, the relocation of businesses to the CBD and upgrade of the central town have been identified as an important project and economic opportunity.	Planning
Paarl waterfront development	Identified as a key catalytic project which will boost the tourism sector. The project consists of mixed use developments (including a hotel, restaurants, office blocks, sports science institute etc.) located on the Berg river.	Council Approved. In process of public approval.
Drakenstein Waste-to-Energy project	The municipality utilises the waste created by the area to generate electricity. The project will also extend the lifespan of the landfill site. This project has resulted in a number of awards and recognitions, winning the "Greenest Municipality" award in two consecutive years.	Tender awarded. Commence 2014

Source: Wesgro Invest in the Western Cape, 2014

According to Wesgro Invest in the Western Cape (2014) and the Local Government Handbook (2013), the following selected investment opportunities exist in Cape Winelands:

- Value-adding in the agricultural sector with growth potential in essential oils, medicinal plants, Buchu and olives etc;
- Electronics industry such as industrial and process automation;
- Future growth in the export-focused transport manufacturers;
- Paarl CBD Redevelopment;
- Call centres (business process outsourcing);
- Tourism (wine, leisure and sports tourism);
- Cleaning projects within different wards;
- There are many dams throughout the district wherein aquaculture may be investigated,
- Solar power grids for wine farms.

7. Companies

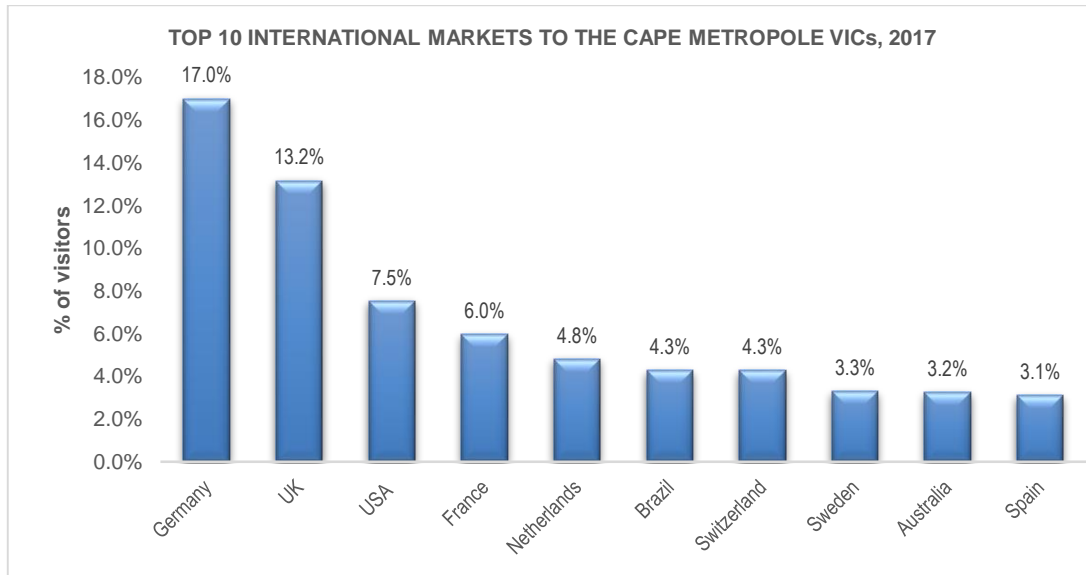
Below are some of the major business in the Cape Winelands:

MAJOR BUSINESSES IN THE CAPE WINELANDS, 2014			
COMPANY	LOCATION	SECTOR	ACTIVITY/INDUSTRY
Capitec	Stellenbosch	Business services	Banking
Monis	Paarl	Agriculture	Fruit-processing
South African Dried Fruits	Wellington	Agriculture	Fruit-processing
Simonsberg Cheese	Stellenbosch	Agriculture	Dairy-processing
Parmalat	Stellenbosch	Agriculture	Dairy-processing
Rainbow Chickens	Worcester	Agriculture	Food-processing
Ceres Fruit Juices	Ceres	Agriculture	Fruit-processing
Nampak	Paarl	Manufacturing	Paper
Coca Cola	Paarl	Manufacturing	Beverages
Coca Cola	Worcester	Manufacturing	Beverages
KWV Holdings	Stellenbosch	Manufacturing	Beverages
Rembrandt	Stellenbosch	Manufacturing	Tobacco
Distell	Stellenbosch	Manufacturing	Beverages
Goudini Spa	Rawsonville	Tourism	Accommodation
Montagu Springs	Montagu	Tourism	Accommodation
L'ermitage Hotel	Franschhoek	Tourism	Accommodation

Source: Winelands District Municipality, 2018

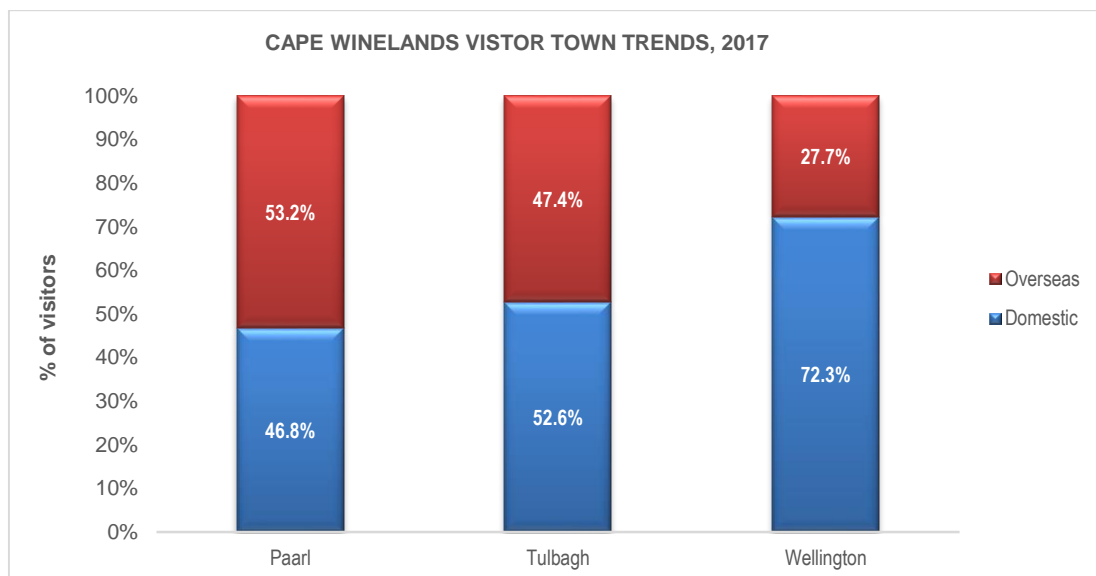
8. Tourism

The Cape Metropole Visitor Information Centres (VICs) recorded a total of 197,060 visitor engagements in 2017. Visitor engagements at the VICs increased by a significant 14.0% when compared to 2016 (172,871). These trends further demonstrate valuable insights into the markets visiting Cape Town. The top five international markets who conducted bookings at the respective Cape Town VICs included Germany (17.0%), the United Kingdom (13.2%), United States (7.5%), France (6.0%) and 4.8% from the Netherlands.



Source: Wesgro Cape Winelands Tourism Trends, 2018

This section provides key trends for towns which recorded a strong sample of responses for the purpose of analysis by Cape Winelands town. The towns represented in this section includes Paarl, Tulbagh and Wellington. Trends by town underlines the strength of the domestic market to the region. Over 70% of visitors to Wellington originated from the domestic market, while Paarl recorded a higher share of respondents from the international market (53.2%). The United Kingdom, Germany, Netherlands and France ranked amongst the top international markets for the towns under review. Visitors to Paarl and Wellington attracted a similar age segment, with most visitors between the age group of 36-50 years; while Tulbagh attracted a stronger share of travellers from the senior and retiree market (51-70 years; 34.6%).



Source: Wesgro Cape Winelands Tourism Trends, 2018

9. Film

The Cape Winelands region is to the longest wine route in the world, the region attracts tourists, business travellers and filmmakers alike. Furthermore the region is home to a number of studios which are located in one most scenic and beautiful wine regions in the world, and features Cape Dutch buildings, world class golf courses, and unsurpassed scenery.

Key Information

Filmmakers must complete the events application form and submit it in person or electronically. Indicate whether road closure is required/ traffic assistance. Regarding municipal open space and parks, an application must be made to the Community Services Department. The relevant municipality will coordinate this process to ensure one point of entry.

Contact

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FILMS SHOT ON LOCATION	
FILMS	The Dark Tower, Mad Max: Fury Road, The Last House on the Left
TV SERIES	Our Girl, Black Sails

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