DEVELOPING THE VINE:

COMMERCIALISATION AND COMMODIFICATION OF THE WINE TOURISM PRODUCT IN THE STELLENBOSCH WINE REGION

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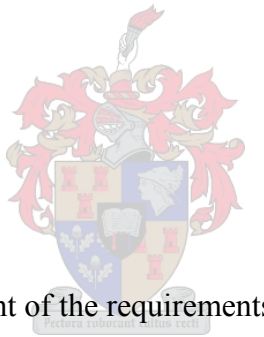

Thesis presented in partial fulfilment of the requirements for the degree of Master of Arts at the University of Stellenbosch.

Supervisor: Dr PH de Necker

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DECLARATION

I, the undersigned, hereby declare that the work contained in this thesis is my own original work and that I have not previously in its entirety or in part submitted it at any university for a degree.

Signature: _____

Date: _____

ABSTRACT

Wine tourism is emerging as an increasingly significant phenomenon in wine-producing regions throughout the world. The Stellenbosch Wine Region (SWR) is no exception and has experienced dramatic changes in the last decade. However, despite the documented industry development and rapid participant expansion, there has been insufficient systematic study of the extent, development, management and marketing of the wine tourism product provided by wine farms.

This study investigates the SWR in terms of the commercial efforts, initiatives, services, facilities and the commodification of resources that occur on wine farms to form the wine tourism product. The aim of the study is to establish the degree of commercialisation and commodification in the SWR. This is achieved through realising three research objectives, namely

- compiling a thorough and complete list of manifestations and indicators that describe commercialisation and commodification in the wine tourism product on wine farms;
- establishing the degree of commercialisation and commodification at each individual wine farm in the research area; and
- portraying and analysing the spatial distribution of the degrees of commercialisation and commodification.

A focus group of twelve individuals involved with wine tourism allocated relative importance weightings for each of the 81 identified manifestations and indicators of commercialisation and commodification compiled in the questionnaire that was distributed to the wine farms in the study area. The questionnaire required respondents to indicate the presence or absence of the listed manifestations or indicators on their respective farms. This data, used in conjunction with the importance weightings, facilitated the calculation of a value representing the degree of commercialisation and commodification for each farm, and so too for the SWR.

The study results confirmed the importance of commercialisation and commodification with every wine farm having some form of these phenomena and the SWR having a 38 percent average degree of commercialisation and commodification. Of the five wine routes in the SWR, the Stellenbosch Hills route has the highest degree of commercialisation and commodification with 42 percent.

OPSOMMING

Die opkoms van wyntoerisme is ‘n toenemend betekenisvolle verskynsel in wynstreke dwarsoor die wêreld. Die Stellenbosch Wynstreek (SWS) is geen uitsondering nie en het dramatiese veranderinge oor die laaste dekade ervaar. Ten spyte van die gedokumenteerde ontwikkeling in die bedryf en die vinnige deelnemer uitbreiding, is daar nie genoegsame sistematiese studie van die omvang, ontwikkeling, bestuur en bemarking van die wyntoerismeproduk, gelewer deur die wynplase, nie.

Hierdie studie ondersoek die SWS in terme van die kommersiële pogings, inisiatiewe, dienste, fasiliteite en die kommodifikasie van hulpbronne wat op wynplase gevind word om die wyntoerismeproduk te vorm. Die doel van die studie is om die graad van kommersialisering en kommodifikasie in die SWS vas te stel. Dit word bereik deur die realisering van drie navorsingsdoelwitte, naamlik

- die definiëring van ‘n volledige en deeglike lys van manifestasies en indikatore wat die kommersialisering en kommodifikasie van die wyntoerismeproduk op wynplase beskryf;
- die bepaling van die graad van kommersialisering en kommodifikasie by elke wynplaas in die navorsingsgebied; en
- die uitbeelding en analisering van die ruimtelike verspreiding van die grade van kommersialisering en kommodifikasie.

‘n Fokusgroep, bestaande uit twaalf individue betrokke in wyntoerisme, het relatiewe belangrikheidsgewigte toegeken aan elk van die geïdentifiseerde manifestasies en indikatore van kommersialisering en kommodifikasie, wat saamgevoeg is in die vraelyste wat versprei is na die onderskeie wynplase in die studiegebied. Die respondente moes die teenwoordigheid of afwesigheid van die gelyste manifestasies aandui. Hierdie data, saam met die belangrikheidsgewigte, is aangewend om waardes te bereken wat die graad van kommersialisering en kommodifikasie van elke wynplaas, asook die SWS, verteenwoordig.

Die navorsing bevestig die belangrikheid van kommersialisering en kommodifikasie en elke plaas is gekenmerk deur vorme van hierdie verskynsels met die SWS wat ‘n 38 persent gemiddelde graad van kommersialisering en kommodifikasie behaal. Van die vyf wynroetes

in die SWS, het die Stellenbosch Hills-roete die hoogste graad van kommersialisering en kommodifikasie vertoon, naamlik 42 persent.

KEYWORDS

Accommodation, Agritourism, Commercialisation, Commodification, Eating facilities, Education, Farm tourism, Heritage, Indicators, Manifestations, Outdoor activities, Retail, Stellenbosch, Tourist attractions, Visitor facilities, Wine destination, Wine sales, Wine region, Wine route, Wine tourism

TREFWOORDE

Akkommodasie, Besoekerfasiliteite, Buitelugaktiwiteite, Eetfasiliteite, Erfenis, Handel, Indikatore, Kommersialisering, Kommodifikasie, Landboutoerisme, Manifestasies, Opvoeding, Plaastoerisme, Stellenbosch, Toeriste-attraksies, Wynbestemming, Wynroete, Wynstreek, Wyntoerisme, Wynverkope

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1. SELECTING THE WINE: AN INTRODUCTION

A beautiful setting, good company and a glass of fine wine - a combination that has been savoured through the centuries all over the world. The historical popularity of wine has led to the increasingly widespread enjoyment of not only wine, but also the touring of wine-producing regions and farms. This integration of wine and tourism puts the wine consumer at the origin of wine and as such, the wine experience and the wine tourist are further enriched and rewarded through not only enjoyment of the various wine fermentations, but also by the attractions, facilities and services provided by the wine farm.

This chapter introduces the research through defining wine tourism in a South African context and explaining commercialisation and commodification, which are the central concepts of this thesis.

1.1 IN THE VINES: DEFINING WINE TOURISM

Tourism as a whole has progressed from being a primarily passive and minor element of the rural landscape to a highly active and dominant agent of change and control in that landscape and of the associated rural communities (Butler, Hall & Jenkins, 1998). And the phenomenon of *wine tourism* is emerging as increasingly significant in wine regions throughout the world (Hall, Johnson, Cambourne, Macionis, Mitchell & Sharples, 2000). The concepts of "wine and tourism are two complementary rural industries, which have enormous potential to contribute to each other and serve as a strong base for the development of a healthy rural economy" (Nowers, De Villiers & Myburgh, 2000: 1). Although wine tourism is established as a form of **rural tourism** by its inherent propensity to occur in rural or non-urban areas, it does however involve a number of other forms of tourism, namely:

- **Cultural tourism**, where cultural aspects that interest visitors are marketed as such, including the customs and traditions of people, their heritage, history and way of life (Department of Environmental Affairs and Tourism, 1996).
- **Eco-tourism**, where environmentally and socially responsible travel to natural or near natural areas takes place, promoting conservation through low visitor

impact and providing beneficially active socio-economic involvement of local people (Department of Environmental Affairs and Tourism, 1996).

- **Agri-tourism**, where specific positive contributions towards the utilisation of natural resources occurs, involving the stabilising of farm income as well as contributing towards broadening the experiences of visiting tourists (Nowers, De Villiers & Myburgh, 2000).

Wine tourism is situated in the intersecting area of these types of tourism (see Figure 1.1) and is a significant part of both the wine and tourism industries. For the tourism industry, viniculture is an important component in the attractiveness of a location, while for the wine industry, tourism builds first-hand relationships between buyer and maker with smaller wine farms often depending on "out-the-door" sales to the public (Hall et al. 2000: 2). Wine tourism then has been defined as "the visitation to vineyards, wineries, wine festivals and wine shows for which grape wine tasting and/or experiencing the attributes of a grape wine region are the prime motivating factors for visiting" (Hall, 1996: 110).

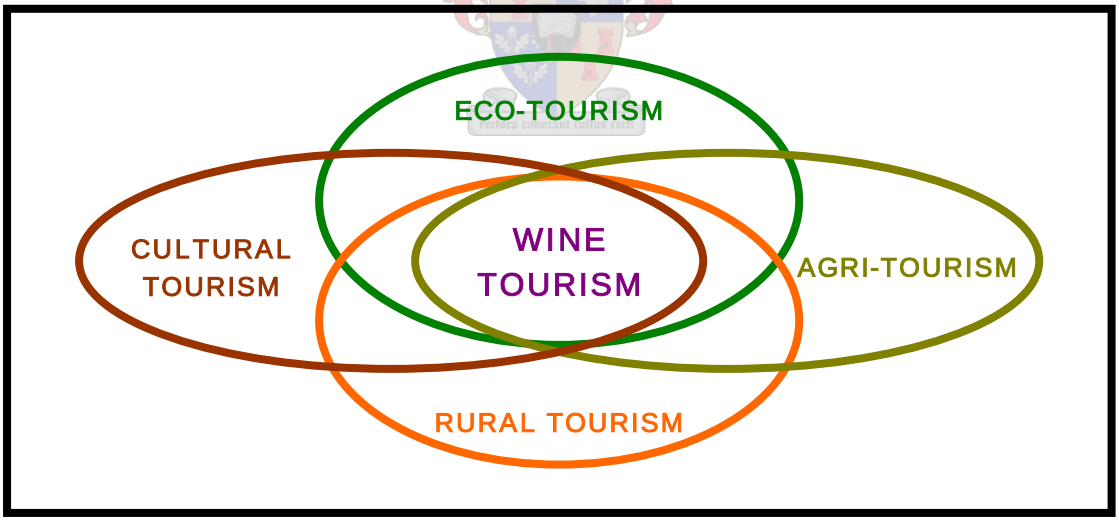


Figure 1.1: Position of wine tourism in relation to some other types of tourism

However, such a singular definition must be considered in the light of the fact that "wine tourism is a concept and product that is still undergoing substantial development" (Hall, et al. 2000: 5). This evolving nature of wine tourism is because the definition is dependent on the type of actor, consumer, tourism agencies and wine

producers involved. Dowling & Getz (2001) expand the idea of a dynamic definition by stating that wine tourism is simultaneously:

- a form of consumer behaviour;
- a strategy by which destinations develop and market wine related attractions and imagery; and
- a marketing opportunity for wineries to educate and sell their products directly to the consumers.

This complexity in the definition of wine tourism is due to it being a diverse phenomenon in both the nature of the product and in the process of delivery. Principally, the wine tourism product cannot be stored, cannot be examined prior to purchase and it is necessary to travel to consume it with the definition involving transport, accommodation, catering, natural resources, and entertainment (Sinclair & Stabler, 1998).

Mitchell, Hall & McIntosh (2000: 130) state that "there is more to wine and wine tourism than the simple consumption of a beverage or that this experience is limited to the senses and emotions associated with wine alone. Wine tourism experiences are much more than this, relying on the characteristics of the individual…, the setting in which they occur, socialisation with the personalities of wine, and interaction with other elements of the experience such as food, accommodation and other visitors. It is the sum of these elements, not each individually, that make up the winery experience".

The concept of wine tourism and the wine tourism experience is clearly a product of many elements and this multi-functional nature extends to diversify the concept of the wine tourism product that farms offer tourists. The wine tourism product manifests itself in the diverse variety of attractions and developments made available to the wine tourist public on wine farms. Understanding the existence and nature of the diversity in these manifestations is the starting point of this study. However, this can only be achieved after identifying the South African context within which the wine and tourism industries operate.

1.2 A RICH LOCAL BLEND: IMPORTANCE OF WINE TOURISM IN SOUTH AFRICA

The first official wine tourism initiative and wine tourism product manifestation in South Africa was the establishment of a "wine route", the Stellenbosch Wine Route, in 1971 by the owners of three wineries who set about encouraging wine producers to bottle their own wine and open the wine farms to the public (Rust, 1996). Wine routes are defined as basically "a tourist route that connects several wine estates and wineries in a given area" (Bruwer, 2003: 424) but are considered an essential ingredient in wine tourism strategies (Getz, 2000). The earliest international records of formal wine routes or trails have been identified in the German tourism industry in the 1920s, namely the *Weinlehrpfad* or "instructional wine path" (Nowers, De Villiers & Myburgh, 2000: 3), although visits to vineyards have been part of organised travel since ancient Greek and Roman times (Vandyke Price, 1985).

Wine routes are now a global phenomenon where European countries such as Hungary, Portugal, Italy and France have also developed their wine-producing regions into wine routes along with Australia, New Zealand, Canada and the United States. The basic objective in establishing these wine routes was to improve the quality of service of wineries while also promoting the individual characteristics of wineries (Hall & Macionis, 1998).

Wine tourism, wine routes and wine tourism products have had a symbiotic relationship in the above wine regions for a long time, but in South Africa it is only in recent years that wine tourism has become an important component of rural development and regional promotion (Hall & Mitchell, 2002). The composite nature of wine tourism as an aggregate of provided goods and services that facilitate business, pleasure and leisure activities (Smith, 1988) has lead to it becoming an increasingly lucrative business strategy for wine farms.

In 2001 the South African wine industry's annual contribution to the gross domestic product was approximately R14,55 billion, with an annual contribution of about 9,7 percent (R8,7 billion) to the gross geographical product of the Western Cape. If the activities of the wine industry were terminated in this province, the total loss to the

country's economy would amount to R9,29 billion with the tourism industry losing R3,47 billion (South African Wine Industry Information and Systems, 2001).

This financial importance of wine tourism is illustrated in the considerable wine industry development and expansion that has marked recent years, not only in the Western Cape, but throughout the wine-producing areas in South Africa. This is noticeable in terms of the number of wineries, with the 2000 edition of John Platter's *South African wines*, listing 40 new wineries compared to the previous year (Platter, 2000), while the 2001 edition lists a further 35 new wineries (Platter, 2001). The 2002 edition shows another 44 new wineries (Platter, 2002), the 2003 edition yet 45 more (Platter, 2003) and the latest 2004 edition documents still 55 more new wineries (Platter, 2004). This means that between 2000 and 2004 the South African wine industry grew by 219 new wine producers.

Surveys of both local and foreign tourists indicate that the wine routes of the Western Cape are by far the most visited non-urban tourist attraction of South Africa (Demhardt, 2003). Indeed, "45 percent of all international visitors to the Western Cape visit the winelands" (Distell Newsroom, 2003: 1). And in terms of the number of wine tourists, Bruwer (2003) states that the average visitation for each wine route farm is over 14 000 visitors per year, the South African wine tourism industry being clearly quite successful in attracting a large number of visitors to its wine route estates. However, the importance of wine tourism in South Africa is recognised not only in wine output, tourist attraction and finances, but also in social and environmental contribution.

The moment a wine farmer accepts the presence of tourists on the farm, he is forced to invest in socially acceptable practices. These include the quality of life of his employees and the production environment. The availability of his farm premises to tourists also adds value and attraction to the diversity of sites and experiences on the wine farm, which in turn encourages sustainable tourism at a regional level (Nowers, De Villiers & Myburgh, 2000). The opening of a wine farm to tourists further provides an environmentally and socially compatible form of tourism, supporting the rural economy and integrating a diversity of people into the mutual and social understanding of the needs of one another (Embacher, 1994).

The continually growing and hence competitive character of the wine and tourism industries in South Africa implies that in order to stimulate tourist interest, a wine farm has to adopt particular strategies to successfully implement wine tourism as a business decision and to ultimately generate an income.

1.3 VITAL INGREDIENTS: CONCEPTS OF COMMERCIALISATION AND COMMODIFICATION

A key element to success in the wine business is that of reputation. Indeed, "central to the success of the global alcohol corporations has been their ability to conjure up favourable images associated with their products in the minds of consumers" (Unwin, 1991: 347). This concept of "reputation" or "brand image" is critical to wine farms, for by embracing wine tourism they put the actual wine farm location at the centre of their market image and wine is "one of those rare commodities that is branded on the basis of its geographical origin" (Merret & Whitwell, 1994: 424). Furthermore, the individual tourist's perception of the farm image or brand and the attraction thereto, can determine the farm's ultimate success or failure (Reid, 2000).

This visitor attraction, with its relationship to reputation, serves as the ideal of wine farms. "Winery visitors are not just looking to taste, but also to learn about, and buy, wine. Many wine tourists are on a social outing, looking for an interesting rural experience. Wineries, to be effective attractions, must provide for social experiences among groups of visitors and preferably cater to a range of activities" (Getz, 2000: 71). It is through this catering for the visitor that the concepts of commercialisation and commodification are introduced.

Attraction, brand image and reputation, the vital elements of wine tourism, are represented in the commercial efforts, initiatives and developments a wine farm chooses to make and how they develop and utilise their resources to cater to the tourist. These specific actions taken and facilities provided by the wine farms can be broadly placed under the umbrella term *commercialisation,* defined as the presence of initiatives and developments for which a charge is levied, publicity sought or a profit earned (Scott, 2001).

The related concept of *commodification* is “the process by which objects and activities come to be evaluated primarily in terms of their exchange value in the context of trade, in addition to any use value such commodities might have” (Fainstein & Gladstone, 1999: 26). With regard to wine tourism, commodification occurs when wine product- and tourist attraction value is identified and promoted in the resources, facilities and services on a wine farm (including those not normally associated with wine). As such the products, services, heritage, culture, refreshments and the environment are transformed into an exchange and value relationship.

The concepts of commercialisation and commodification can be further understood as agents of organisational change at farm level. Wine farms are traditionally places of production (primary and secondary activities) with the production and harvesting of wine grapes and the making of wine. However, the addition of commercial developments (e.g. restaurants, shops and accommodation) and by commodifying farm resources or features (e.g. historical buildings, hiking trails and venue hire), wine farms not only change their production orientation by adopting these tertiary and quaternary retailing and service activities, but also expand the wine farm to become places of consumption.

It is within this wine tourism paradigm of production, consumption, initiatives, efforts, actions and facilities with the purpose of promoting farm visitation and wine sales that commercialisation and commodification can be defined. As such, commercialisation and commodification are recognised as the means of developing a wine farm into a complete wine tourism product. They indicate a constructive decision to encourage and develop wine tourism as a holistic element of the wine farm and the economy of the surrounding area.

1.4 SPILLAGE: RESEARCH PROBLEM

Despite the realisation of wine tourism’s potential as a lucrative farm business enterprise, the recognition of tourism’s economic importance, and the increasing number of participants in the wine industry, there is very little place- or regional-specific research done on the development of wine tourism and the marketing thereof (Nowers, De Villiers & Myburgh, 2000). More emphatically, there has been

insufficient systematic study of the development, the management and marketing of wine tourism and of the people who visit and experience the wine tourism product (Hall, et al. 2000). And within this scope of wine tourism development, management and marketing, there has been even less analysis of the complex wine tourism product provided to the public at individual wine farms. A great deal more research is necessary in order to understand the elements of customer, supplier and the various destination actions that improve their interaction (Getz, 1998).

An international strengths, weaknesses, opportunities and threats analysis of four major international wine producing areas, namely British Columbia (Canada), Victoria (Australia), Western Australia and New Zealand, recognised that the most commonly perceived weakness in wine tourism was the lack of industry research (Hall, Sharples & Smith, 2003). More specifically, "the amount of published research on cellar-door tourism worldwide is sparse" (Bruwer, 2003: 424). It is this lack of formal and structured study that provides the rationale for this investigation.

1.5 THE WINE REGION: STUDY AREA

Within the South African context, Stellenbosch is the predominant hub of the core area of viticulture and wine tourism in the Western Cape (Demhardt, 2003). Although it is one of the smallest South African wine districts, it makes up 15.3 percent of the national hectarage of vineyards (South African Wine Industry Information and Systems, 2001). "The latest available economic impact study of tourism in the Stellenbosch district estimated that in 1997 all direct spending amounted to R843 million" (Demhardt, 2003: 119). And in terms of wine quality, even though the Stellenbosch region is responsible for only 11 percent of South Africa's wine production, it receives 70 percent of all local and international awards made to South African wines (Distell Newsroom, 2003).

Stellenbosch is furthermore home to South Africa's first wine route, currently named the Stellenbosch American Express Wine Routes (SAEWR). Established in 1971, this route handles up to 1.2 million visitors a year (Barnard, 2004), and has inspired the development of 15 more wine routes in South Africa (Nowers, De Villiers & Myburgh, 2000). The Stellenbosch area is recognised not only as having the most

influence in the South African wine tourism industry (Bruwer, 2003), but also in experiencing “the most dramatic increase in wine producers” (Preston-Whyte, 2000: 105).

Scott (2001) has investigated this identified increase in participants in wine tourism and the coinciding increase in commercialisation efforts and activities to lure visitors to the wine farms of this area on a limited scale, and according to De Kock (2002, pers com), CEO of the SAEWR, the growth of wine tourism in the Stellenbosch area will continue apace. Therefore, as the established centre of the South African wine industry and the identified hub of South African wine tourism, the Stellenbosch Wine Region (SWR) is the chosen research area of this study (see Figure 1.2).

Source: Cape Town and the Western Cape, 2004

Figure 1.2: Location of the Stellenbosch Wine Region in the Western Cape

The SWR is defined in a list published by the Stellenbosch Tourism and Information Bureau (2002), that indexes wine-producing farms (both non-affiliated and SAEWR members) with cellar door sales and services situated in the greater Stellenbosch, Somerset West and Kuils River areas. According to this list the SWR consists of 106 wine farms distributed on five individual wine routes, namely:

- **Bottelary Hills** - Bottelary, Devon Valley, Stellenboschkloof
- **Greater Simonsberg** - Simonsberg, Helshoogte, Muldersvlei/Elsenburg
- **Helderberg** - Helderberg, Firgrove
- **Stellenbosch Hills** - Papegaaiberg, Vlottenburg, Lynedoch, Faure, Vlaeberg
- **Stellenboschberg** - Stellenboschberg, Jonkershoek.

Figure 1.3 illustrates the location of these wine routes within the SWR, as well as indicating the location of participant wine farms.

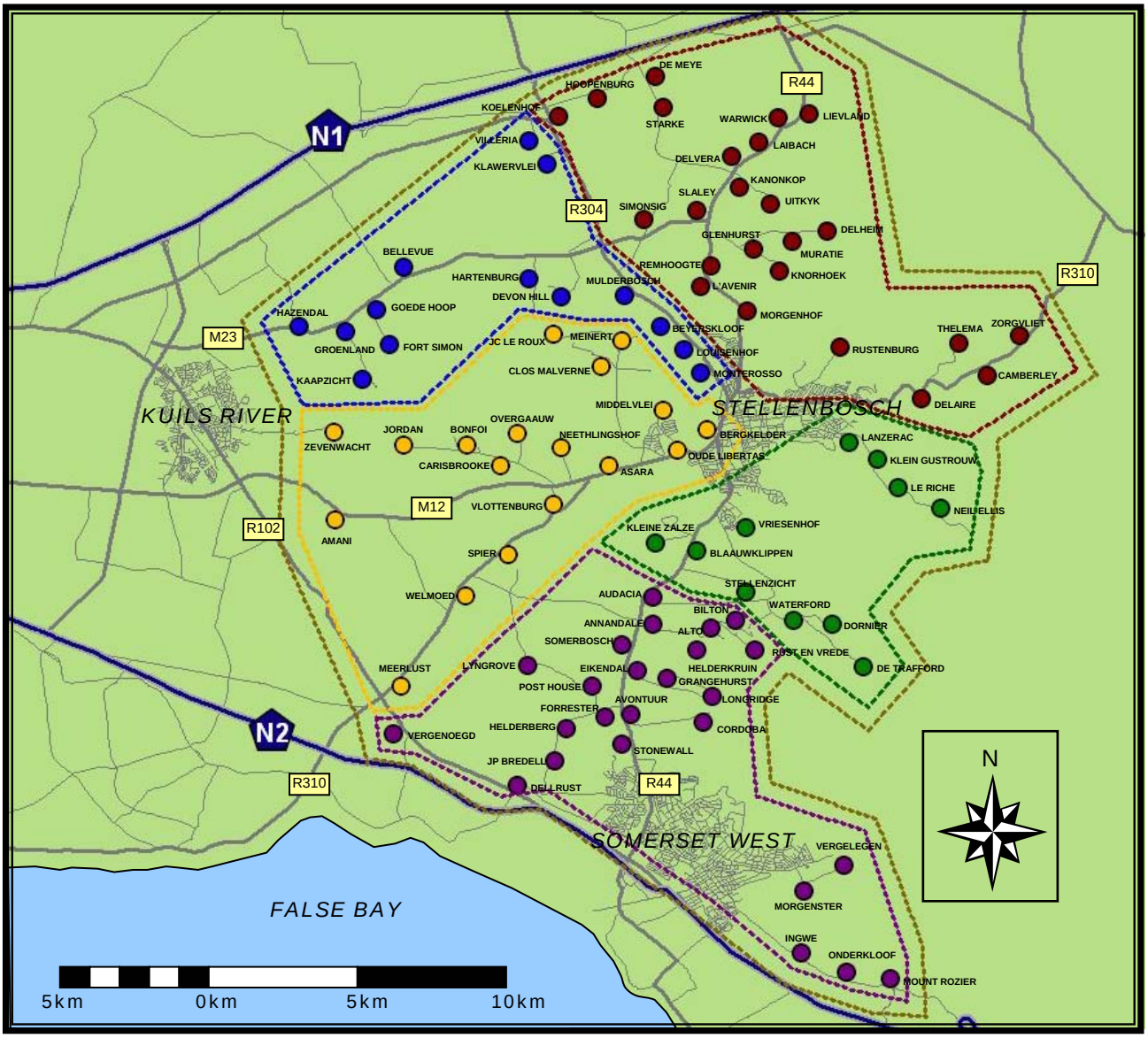
1.6 THE FERMENTATION PROCESS: RESEARCH AIM AND OBJECTIVES

The research problem and study area have been outlined, and it has been established that wine tourism has considerable economic and regional influence and that the wine tourism product is a dynamic and evolving phenomenon. Therefore, given the expressed importance of wine tourism and growth of participants, the shortage of regional-specific analysis of the wine tourism product and the vital role of commodification and commercialisation in developing and defining this product, the *aim* of this study is to establish the degree of commercialisation and commodification in the SWR.

In order to realise this aim, the following research objectives have been identified:

- To compile a comprehensive list of the manifestations and indicators that describe commercialisation and commodification in the wine tourism product on wine farms.
- To determine the degree of commercialisation and commodification at each wine farm in the SWR.
- To uncover, describe and explain the distribution of commercialisation and commodification in the SWR.

These objectives are designed to realise a regional-specific analysis of the wine tourism product as supplied to the tourist, specifically at wine farms on the wine routes in the SWR. The methodology employed to reach these objectives is explained in the following chapter.



WINE ROUTES IN THE STELLENBOSCH WINE REGION	
	STELLENBOSCH WINE REGION
	BOTTELARY HILLS
	GREATER SIMONSBERG
	HELDERBERG
	STELLENBOCH HILLS
	STELLENBOSCHBERG

NATIONAL ROADS
MAIN ROADS
FARM ACCESS ROADS
URBAN AREAS
ATLANTIC OCEAN

THE COLOUR-CODED SYMBOL PLOTTED AT A FARM LOCATION REFLECTS THE INDIVIDUAL WINE ROUTE THAT THE FARM IS FOUND ON IN THE STELLENBOSCH WINE REGION.

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Figure 1.3: Wine routes in the Stellenbosch Wine Region and wine farms on each route, 2002

2. POPPING THE CORK: RESEARCH METHODOLOGY

This chapter explains the methods employed to achieve the research objectives. The preparation for the study is explained, including the questionnaire and focus group along with the data collection methods and survey response rates. The statistical calculations and variables involved in this study are also discussed and explained. The chapter concludes with an outline of the process of data analysis and a research design.

2.1 PREPARING THE PALATE: QUESTIONNAIRE SURVEY

An extensive catalogue of possible manifestations or indicators of commercialisation and commodification in wine tourism was compiled by identifying components and elements from the reviewed literature, personal experience and interviews and discussions with persons involved in the wine and wine tourism industries. This list was categorised in a questionnaire (see Appendix A) which was distributed (in 2002) to all the wine farms in the Stellenbosch Wine Region via e-mail or fax. The farms and their contact details were obtained from the Stellenbosch Tourism and Information Bureau and promotional material. Respondents completed the questionnaire by marking the presence or absence of those manifestations of commercialisation and commodification at that particular farm location. The completed questionnaires were returned via fax or e-mail. The questionnaire structure, survey response and reliability are briefly discussed.

2.1.1 Composition of the questionnaire

The questionnaire commences with three simple yes or no type questions, that encompass three identified factors that are expected to have an effect on a wine farm's overall degree of commercialisation and commodification. The questions were designed to get an indication of an individual wine farm respondent's attitude and perception regarding wine tourism. The questions are:

1. Are you a member of the Stellenbosch Wine Routes?
2. Does the wine farm make efforts to encourage wine tourism?
3. Is wine the most important (primary) attraction of the wine farm?

The respondents' answers were later compared with the calculated degrees of commercialisation and commodification to assist in identifying and explaining the degrees (see Section 4.3). These questions are followed by the categorised list of manifestations and indicators of commercialisation and commodification (see Table 2.1) that respondents were asked to mark as being present or absent.

Table 2.1: Manifestation and indicator categories of commercialisation and commodification in the survey questionnaire

MANIFESTATION CATEGORY	NUMBER OF MANIFESTATIONS	PERCENTAGE OF TOTAL
EATING FACILITIES	7	9%
ACCOMMODATION	5	6%
WINE SALES	17	21%
VISITOR FACILITIES	10	12%
EDUCATIONAL	8	10%
RETAIL	7	9%
HERITAGE	5	6%
OUTDOOR	9	11%
MISCELLANEOUS	7	9%
OTHER*	6	7%
TOTALS	**81**	**100%**

* Added by respondents.

There were nine categories of commercialisation and commodification with 75 manifestations and indicators in total. An *other* category was included in the questionnaire for addition by the respondents of items they deemed relevant or applicable the study. Six such other items were mentioned by the respondents, giving a total of 81 indicators. The questionnaire's extensive catalogue of manifestations and indicators of commercialisation and commodification in wine tourism fulfils the first objective of this study (see Section 1.4).

The eating facilities, accommodation, wine sales and visitor facilities categories further requested respondents to indicate the maximum number of patrons or visitors that particular facilities could cater for. These four capacity indicators are not included in Table 2.1 as they are studied as a separate aspect of commercialisation and commodification and were not submitted to the focus group for assessment.

2.1.2 Response rates

Wine farms that did not respond to the initial distribution were contacted by telephone and, if possible, the questionnaire was completed over the telephone or an alternative arrangement was made, such as a personal appointment during which the questionnaire was completed at the wine farm.

However, some farms chose not to participate, and of the 106 registered wine farms in the Stellenbosch Wine Region, 92 responded. Table 2.2 shows the response rates for each of the five wine routes in the study area (the list of all the respondent farms is given in Table 4.1).

Table 2.2: Survey response rates according to wine route in the SWR

WINE ROUTE	NO. OF FARMS PER ROUTE	NO. OF RESPONDENT FARMS	RESPONSE RATE
GREATER SIMONSBERG	25	24	96%
BOTTELARY HILLS	15	14	93%
STELLENBOSCHBERG	12	11	92%
HELDERBERG	29	25	87%
STELLENBOSCH HILLS	25	18	71%
STELLENBOSCH WINE REGION	**106**	**92**	**87%**

The response rates of four wine routes are all relatively high, while only the Stellenbosch Hills route has a noticeably lower response rate of 71%. There is no recognisable reason for this lower rate, as Stellenbosch Hills does not have an exceptionally high or low number of wine farms that could affect the average and all the farms, throughout the Stellenbosch Wine Region were approached in the same manner. Stellenbosch Hills simply had fewer responding wine farms, with time constraints and disinterest being the reasons given for non-response.

2.1.3 Reliability of responses

The issue of respondent reliability was addressed in the questionnaire by requesting that a respondent state his/her position or job description at the wine farm. This served as a simple indication of the reliability of the answers given in the returned

questionnaires. The positions of the respondents and the percentage they make up of the total farm response are recorded in Table 2.3.

Table 2.3: Respondents' job position and their percentage of the total response

CATEGORY OF JOB POSITION	JOB POSITION OF RESPONDENT	NUMBER	PERCENTAGE
MARKETING & PUBLIC RELATIONS 37%	Public Relations Officer	21	23%
	Wine Tasting/Sales Assistant	8	9%
	Receptionist	4	4%
	Promotions Officer	1	1%
MANAGEMENT 36%	Wine Manager/Winemaker	5	5%
	Marketing Manager	6	7%
	Farm Manager	4	4%
	Sales Manager	4	4%
	Wine Shop Manager	3	3%
	General Manager	2	2%
	Promotions Manager	2	2%
	Financial Manager	2	2%
	Public Relations Manager	1	1%
	Guest Relations Manager	1	1%
	Wine Tasting/Sales Manager	1	1%
	Office Manager	1	1%
	Administration Manager	1	1%
OWNERSHIP 18%	Owner or Partner	11	12%
	Director	6	7%
SUSPECT RELIABILITY 9%	Personal Assistant	4	4%
	Accountant	1	1%
	Position not indicated	3	3%
	TOTALS	**92**	**100%**

The assumption was made that the closer the respondent's job position was to wine marketing, public relations, management or ownership, the more informed, and thus the more reliable their responses would be concerning the manifestations and indicators on the wine farms. Random visitation of farms revealed some isolated discrepancies in the response data in the form of manifestations not marked as present by respondents, but in the cases of these minor instances, the manifestations had been implemented or initiated after the questionnaire had been returned. Only three of the 92 respondents did not indicate their positions.

Considering that the majority of the respondents (91%) are in the job position categories that are considered to be suitably informed, that 54 of the 92 questionnaire

respondents, including all the respondents in the suspect reliability category (except non-indicated) were supervised in person by the researcher at the actual wine farm location (thereby ensuring accuracy), and that only three farms did not provide respondent positions, the information acquired in the survey is deemed reliable.

2.2 WINE TASTERS: THE FOCUS GROUP

The issue of reliability is not limited to responses and continues in the study as each manifestation and indicator set out in the questionnaire cannot be assumed to be of equal importance in determining the degree of commercialisation and commodification at a wine farm. A focus group was assembled and members were asked to assess the importance of each indicator. The composition of the focus group is shown in Table 2.4.

Table 2.4: Composition of the focus group used to evaluate commercialisation and commodification indicators

AFFILIATION WITH WINE TOURISM	NUMBER OF PARTICIPANTS	PERCENTAGE OF FOCUS GROUP
POSTGRADUATE TOURISM STUDENTS	4	33%
ACADEMICS (TOURISM LECTURERS)	2	17%
WINE TASTING AND SALES STAFF	2	17%
TOURISM MANAGERS	2	17%
WINE FARMERS	2	17%
TOTALS	**12**	**101% ***

* Percentages do not add up to 100 due to rounding.

The study is supply orientated, with the investigation aimed at commercialisation and commodification at wine farm level. This research focus on the *provision* of the wine tourism product dictated that the focus group comprise persons having educated opinions on what is important in making this product available from a supply perspective. Therefore the demand side of wine tourism (i.e. wine tourists' opinions) is excluded as that would involve a consumption perspective.

Focus group members were asked to indicate the level of importance on a scale of 1 (not important) to 5 (very important) of each indicator for wine tourism from a farm

perspective (see Table 2.5). Focus group members were allowed the discretion to evaluate and score each indicator according to their own perceptions.

Table 2.5: Example of a score sheet of a focus group member

1 = NOT IMPORTANT / 5 = VERY IMPORTANT					
HERITAGE	**1**	**2**	**3**	**4**	**5**
Historical building(s)				X	
Monument(s)		X			
Museum / Historical display			X		
Art gallery		X			
Antique sales		X			

The scores given to the indicators by the focus group members were added together and the averages calculated. The averages were used to indicate the relative importance or weight of each indicator of commercialisation and commodification (see Table 2.6).

Table 2.6: Manifestations and indicators of commercialisation and commodification and the focus group scores and weights

CATEGORY	FOCUS GROUP MEMBER SCORES													
WINE SALES	Academics		Wine tasting/ sales staff		Managers		Post-grad students				Wine farmers		**Total**	**WEIGHT**
Specific sales area	5	2	5	5	5	3	5	5	3	5	5	5	53	4.42
Sell own wines	5	1	4	5	5	3	5	3	4	5	5	4	49	4.08
Sell other wines	4	4	4	2	4	2	2	3	3	4	3	3	38	3.17
Sell other grape-related products (e.g. brandy,etc.)	4	2	4	4	5	4	3	2	4	4	4	4	44	3.67
Seated tasting area	5	3	3	5	5	4	4	3	4	5	5	5	51	4.25
Standing tasting area	5	2	3	5	5	2	4	2	4	5	5	4	46	3.83
Comfort areas (e.g. shade, seating, waiting)	2	1	5	4	5	4	5	4	4	5	5	3	47	3.92
Tasting and sales only by appointment	5	1	1	2	3	1	2	3	4	1	2	2	27	2.25
Tasting fee levied	5	3	2	1	4	1	3	3	5	3	3	4	37	3.08
Trained sales and tasting staff	5	3	5	5	5	5	5	4	5	4	5	5	56	4.67
Open on Sundays	4	4	3	3	5	5	3	4	5	3	4	1	44	3.67
Open on public holidays	4	4	4	5	5	5	3	3	5	5	5	5	53	4.42
Wine auctions	5	2	4	4	3	2	4	3	4	1	3	2	37	3.08
Wine festivals	5	2	4	5	4	3	4	3	4	3	5	4	46	3.83
Delivery facilities for purchases	3	3	5	5	5	4	5	3	4	4	5	3	49	4.08
Mail order sales	3	1	5	5	5	4	4	4	5	4	5	5	50	4.17
Internet sales	3	1	5	5	5	4	4	4	4	4	4	2	45	3.75
TOTALS AND AVERAGE WEIGHT	Total number of scores : 17 x 12 = 204												772	**3.78**

Table 2.6 continued overleaf

Table 2.6 continued

CATEGORY	FOCUS GROUP MEMBER SCORES													
VISITOR FACILITIES	Academics		Wine tasting/ sales staff		Managers		Post-grad students				Wine farmers		**Total**	**WEIGHT**
Reception / Information centre	5	5	5	5	5	3	5	4	5	3	3	4	52	4.33
Brochures / Pamphlets	4	2	5	5	5	1	5	4	5	4	5	4	49	4.08
Signage / Directions	4	2	5	5	5	5	5	4	5	5	5	5	55	4.58
Tour group arrangements	4	3	5	4	5	5	5	3	5	5	4	4	52	4.33
Parking for tour buses	3	4	5	4	5	5	5	3	5	5	4	3	51	4.25
Parking for motor cars	3	3	5	4	5	5	5	3	5	5	4	3	50	4.17
Facilities for disabled visitors	2	3	4	4	5	5	5	3	5	5	3	4	48	4.00
Toilets	4	3	5	5	5	5	5	4	5	5	5	5	56	4.67
Drinking water	1	2	5	5	5	5	5	4	5	5	3	4	49	4.08
Children's playground	3	1	4	4	4	4	3	3	5	2	2	1	36	3.00
TOTALS AND AVERAGE WEIGHT	Total number of scores : 10 x 12 = 120												498	**4.15**

OUTDOOR	Academics		Wine tasting/ sales staff		Managers		Post-grad students				Wine farmers		**Total**	**WEIGHT**
Wild game / Nature reserve	4	3	2	4	5	4	2	3	1	2	2	4	36	3.00
Farm animal viewing / feeding area	3	3	3	3	5	4	2	2	5	2	4	4	40	3.33
Bird-watching	3	2	3	3	4	2	3	2	5	1	3	4	35	2.92
Fishing	3	2	5	3	4	3	2	2	1	1	3	4	33	2.75
Hiking trail(s)	4	2	5	4	5	4	3	2	3	1	3	4	40	3.33
4x4 trail(s)	4	3	4	4	4	3	2	3	3	1	1	4	36	3.00
Mountain bike trail(s)	4	2	4	3	4	3	3	2	3	1	1	4	34	2.83
Stud farming	2	1	2	4	4	3	3	2	3	1	1	1	27	2.25
Horse-riding	2	3	4	4	5	3	4	2	4	1	2	3	37	3.08
TOTALS AND AVERAGE WEIGHT	Total number of scores : 9 x 12 = 108												318	**2.94**

EDUCATIONAL	Academics		Wine tasting/ sales staff		Managers		Post-grad students				Wine farmers		**Total**	**WEIGHT**
Guided cellar tours	5	3	4	4	5	4	3	4	3	4	5	4	48	4.00
Guided vineyard tours	4	3	3	4	5	4	3	4	3	2	3	3	41	3.42
Personalised tours by appointment	5	3	4	3	5	3	3	4	3	1	4	3	41	3.42
Wine-making courses	4	4	4	4	4	5	3	3	2	1	3	5	42	3.50
Wine-tasting courses	4	3	5	5	4	5	4	3	2	2	5	5	47	3.92
Hands-on experiences (e.g. grape crushing)	3	2	5	3	5	5	4	3	2	1	5	5	43	3.58
Wine barrel-making	3	1	4	3	5	4	2	3	2	1	1	1	30	2.50
Instructional books / Leaflets	3	2	4	4	4	3	3	4	2	1	5	3	38	3.17
TOTALS AND AVERAGE WEIGHT	Total number of scores : 8 x 12 = 96												330	**3.44**

EATING FACILITIES	Academics		Wine tasting/ sales staff		Managers		Post-grad students				Wine farmers		**Total**	**WEIGHT**
Restaurant	5	5	1	5	5	5	5	5	5	5	5	3	54	4.50
Prepared picnics	3	3	2	3	5	2	2	2	2	3	5	2	34	2.83
Private picnicking	2	2	2	4	4	3	3	2	1	2	5	2	32	2.67
Pre-booked meals	4	3	2	4	5	1	3	3	1	3	1	3	33	2.75
Packed lunches	4	3	2	2	3	1	2	3	1	2	1	2	26	2.17
Coffee shop / Tea room	5	4	4	2	4	4	3	4	3	4	1	2	40	3.33
Vending machine	2	2	4	2	3	1	2	3	1	1	1	1	23	1.92
TOTALS AND AVERAGE WEIGHT	Total number of scores : 7 x 12 = 84												242	**2.88**

RETAIL	Academics		Wine tasting/ sales staff		Managers		Post-grad students				Wine farmers		**Total**	**WEIGHT**
Cheesery	4	3	4	3	4	3	4	3	2	3	3	1	37	3.08
Fruit and/or Vegetable sales	4	2	2	2	3	2	4	3	4	2	1	1	30	2.50
Plant nursery	4	2	1	2	3	1	3	2	3	1	1	1	24	2.00
Craft market	4	5	2	1	4	3	3	3	5	2	3	1	36	3.00
Pottery	4	4	3	1	3	2	3	2	3	2	3	1	31	2.58
Gift / Souvenir shop	4	5	4	4	4	3	4	3	2	3	4	1	41	3.42
Farm / Cellar branded merchandise (e.g. clothes)	5	5	5	4	5	3	5	3	1	2	3	1	42	3.50
TOTALS AND AVERAGE WEIGHT	Total number of scores : 7 x 12 = 84												241	**2.87**

Table 2.6 continued overleaf

Table 2.6 continued

CATEGORY	FOCUS GROUP MEMBER SCORES													
MISCELLANEOUS	Academics		Wine tasting/ sales staff		Managers		Post-grad students				Wine farmers		**Total**	**WEIGHT**
Conference centre	5	5	5	4	5	4	4	3	5	2	4	1	47	3.92
Venue / private function hire	5	3	5	4	5	4	4	3	5	3	4	2	47	3.92
Film locations	4	2	4	3	5	4	3	2	5	1	1	5	39	3.25
Heli-pad	5	5	1	3	4	4	3	2	2	1	3	1	34	2.83
Airfield	5	5	1	3	3	3	3	2	5	1	3	1	35	2.92
Amphitheatre	5	5	4	2	4	3	3	3	2	1	2	1	35	2.92
Sport facilities	5	4	3	2	4	3	2	3	2	1	1	1	31	2.58
TOTALS AND AVERAGE WEIGHT	Total number of scores : 7 x 12 = 84												268	**3.19**

OTHER	Academics		Wine tasting/ sales staff		Managers		Post-grad students				Wine farmers		**Total**	**WEIGHT**
Bali clothing boutique	3	5	1	2	3	1	1	3	1	1	1	1	23	1.92
Horse-drawn carriage rides	3	3	3	2	3	4	1	3	2	1	2	3	30	2.50
Weaving	3	4	3	2	3	2	1	3	3	1	1	1	27	2.25
Jewellery sales	3	5	1	2	4	2	1	3	4	1	1	1	28	2.33
Olive products	4	2	4	4	4	4	3	2	4	3	4	2	40	3.33
Outdoor sculptures	3	4	4	2	3	2	2	3	5	1	2	1	32	2.67
TOTALS AND AVERAGE WEIGHT	Total number of scores : 6 x 12 = 72												180	**2.50**

ACCOMMODATION	Academics		Wine tasting/ sales staff		Managers		Post-grad students				Wine farmers		**Total**	**WEIGHT**
Hotel	5	5	3	3	5	4	4	3	1	1	3	1	38	3.17
Cabins / Bungalows	4	3	3	4	5	4	3	3	2	1	4	2	38	3.17
Guesthouse / Bed and Breakfast	4	4	3	4	5	5	3	2	3	1	5	3	42	3.50
Rooms for rent (e.g. granny-flats, student housing)	3	2	3	3	3	2	2	2	2	1	1	2	26	2.17
Camping / Caravan Park	3	3	3	2	2	1	1	1	2	1	1	2	22	1.83
TOTALS AND AVERAGE WEIGHT	Total number of scores : 5 x 12 = 60												166	**2.77**

HERITAGE	Academics		Wine tasting/ sales staff		Managers		Post-grad students				Wine farmers		**Total**	**WEIGHT**
Art gallery	4	5	3	4	4	2	3	3	3	2	3	2	38	3.17
Antique sales	4	5	3	2	3	2	3	3	2	2	1	2	32	2.67
Museum / Historical display	3	3	4	3	4	3	4	4	4	2	1	4	39	3.25
Monument(s)	3	1	3	3	4	2	4	3	1	2	3	1	30	2.50
Historical building(s)	5	1	2	3	5	3	5	3	1	3	5	5	41	3.42
TOTALS AND AVERAGE WEIGHT	Total number of scores : 5 x 12 = 60												180	**3.00**

Table 2.6 is arranged in descending order according to the number of manifestations and indicators per category. The average weight of each category is calculated by adding all the allocated weights of the manifestations together and dividing this total weight by the number of manifestations. Using the calculated average weights, it is possible to rank the categories of commercialisation and commodification according to their relative importance to wine tourism.

Table 2.7 summarises the category average weights, the figures used in their determination and gives an indication of which category is deemed by the focus group to be the most important to wine tourism.

Table 2.7: Ranking of manifestation categories according to average importance weight and SWR averages

RANK	CATEGORY	TOTAL WEIGHT	NUMBER OF MANIFESTATIONS	AVERAGE WEIGHT
1	Visitor Facilities	41.50	10	4.15
2	Wine Sales	64.33	17	3.78
3	Education	27.50	8	3.44
4	Miscellaneous	22.33	7	3.19
5	Heritage	15.00	5	3.00
6	Outdoor	26.50	9	2.94
7	Eating Facilities	20.17	7	2.88
8	Retail	20.08	7	2.87
9	Accommodation	13.83	5	2.77
10	Other	15.00	6	2.50
STELLENBOSCH WINE REGION TOTALS AND AVERAGE WEIGHT		**266.24**	**81**	**3.29**
EXCLUDING "OTHER" CATEGORY		**251.24**	**75**	**3.35**

The Stellenbosch Wine Region, as a whole, has a relatively high average weight of 3.29 (out of 5). The higher average weight for the SWR excluding the "other" category is also given to suit the calculation method used to determine the farm level of commercialisation and commodification (see Formula 1).

The visitor facility category has the highest average weight and is 0.37 more than the wine sales category which was expected to have the highest average. It is noteworthy that the importance of wine sales in wine tourism is superseded in importance by the provision of facilities for visitors. Clearly, according to the focus group, the "tourism" aspect of wine tourism is more important than the "wine" aspect. Education is the only other category above the SWR average, highlighting the importance of contributing to the wine tourism product through providing further knowledge and expanding the wine farm experience.

The fourth-placed ranking of the miscellaneous category is surprising as this category contains indicators not necessarily or directly associated with wine tourism. The below SWR average scores of all the "money-making" categories (except wine sales) namely, accommodation, retail and eating facilities were also unexpected.

Now that the manifestations and indicators of commercialisation and commodification with their relative importance weights have been introduced, section 2.3 discusses how these various weights are used in conjunction with the questionnaire data to calculate a number of indices and values that help to analyse and describe the state of commercialisation and commodification in the SWR.

2.3 TASTING METHODS: INDICES AND VALUES USED TO ANALYSE AND REVIEW COMMERCIALISATION AND COMMODIFICATION

The most important index is the degree of commercialisation and commodification (***C***) for each wine farm in the SWR. The first step in determining this index is to allocate the relative importance weights to each farm according to its particular combination of manifestations, as per the returned questionnaire. Each farm's unique allocation of weights is totalled and divided by the sum of the weights of all the indicators of commercialisation and commodification. The answer is converted to a percentage, which indicates each individual farm's degree of commercialisation and commodification (see Formula 1).

Formula 1: Farm all-category degree of commercialisation and commodification index (***C***)

$$C = \left(\frac{fw}{(mw + other)} \right) 100$$

C is the individual farm's degree of commercialisation and commodification, where ***fw*** (farm weight) is the individual totalled weight of the farm's manifestations and ***mw*** (maximum weight) is the maximum total weight that a farm in this study could achieve, that is 251,24. The limited size of the "other" category means that only those farms with documented "other" manifestations are divided by an ***mw*** that includes their applicable "other" manifestation weight (***other***).

Apart from the degree of commercialisation and commodification (***C***) for each wine farm, each of the five wine routes in the SWR has their own *real* and *possible* values,

and an *average* and a *commercialisation and commodification* index calculated for each of the indicator categories. The *real* value (***R***) indicates the total number of indicators each route actually has in a category. The *possible* value (***P***) indicates the total number of possible indicators (maximum) each route can have in a category.

The *average* index (***A***) takes into account the number of farms per route, as some routes have more farms than others, by dividing the number of actual indicators per route (***R***) by the total possible indicators (***P***). The result is converted into a percentage and becomes the average indicator index (see Formula 2).

Formula 2: Average indicator index (***A***)

$$A = \left(\frac{R}{P} \right) 100$$

The *commercialisation and commodification* index (***C&C***) is an expression of the average level of commercialisation and commodification of each indicator category in each wine route. The ***C&C*** index entails a number a separate calculations. First, every farm's indicator importance weights in a specific category are totalled. These farm category weight totals (***cfw***) are summed according to wine route giving a total weight for each category in each wine route ($\sum \boldsymbol{cfw}$).

Second, using the weights in Table 2.6 the maximum possible indicator weight total is calculated for every category. This category maximum weight total (***cmw***) is multiplied by the number of farms in each wine route (***WR***) to give the maximum category weight per wine route ($\boldsymbol{WR}(\boldsymbol{cmw})$). The ***C&C*** value is determined for every indicator category in each wine route by dividing the total category weight ($\sum \boldsymbol{cfw}$) for the wine route by the corresponding maximum category weight ($\boldsymbol{WR}(\boldsymbol{cmw})$) for that wine route. The result is converted to a percentage (see Formula 3).

Formula 3: Wine route level of commercialisation and commodification index (***C&C***)

$$\boldsymbol{C\&C} = \left(\frac{\sum cfw}{WR(cmw)} \right) 100$$

In the process of determining a wine route's ***C&C*** index, each individual farm's commercialisation and commodification value for a category (***Fc&c)*** can also be calculated by dividing an individual farm's total allocated category weights (***cfw***) by a category's maximum weight (***cmw***) and the answer is converted to a percentage (see Formula 4).

Formula 4: Farm commercialisation and commodification index per category (***Fc&c***)

$$\boldsymbol{Fc\&c} = \left(\frac{cfw}{cmw} \right) 100$$

Further analysis is done using the *capacity* data supplied by the respondents. This capacity data involves the number of people that wine farms can serve, cater for and accommodate in their visitor facility, wine sales, eating facility and accommodation indicator categories. Capacity data is limited to these four categories and is expressed in three values, namely *total capacity*, *farm capacity* and *wine route capacity*.

Total capacity (***Tcap***) is the total number of visitors that can be catered for in a wine route per category. Farm capacity (***Fcap***) is the average number of people who can be accommodated by the farms that indicated capacity numbers. Wine route capacity (***WRcap***) is the average number of people who can be received per wine route, including farms without any capacity manifestations. The farm capacity value for each wine route in the SWR is calculated by dividing the total capacity (***Tcap***) by the total number of farms that have manifestations with a visitor capacity (***af***) in a wine route (see Formula 5).

Formula 5: Farm capacity value

$$Fcap = \frac{Tcap}{af}$$

The specific wine route capacity value is calculated by dividing the total capacity (***Tcap***) by the total number of farms in the wine route (***WR***) (see Formula 6).

Formula 6: Wine route capacity value

$$WRcap = \frac{Tcap}{WR}$$

Table 2.8 provides a quick reference that summarises each index and value used in the study with the representative symbol, an explanatory description, the formula used in their calculation and a list of their occurrence throughout the report.

Table 2.8: Summary of the symbol, description, calculation and occurrence of study values and indices

SYMBOL	DESCRIPTION	FORMULA	OCCURRENCE IN STUDY (SECTIONS)
C	The degree of commercialisation and commodification for each wine farm in the SWR based on all indicators	$C = \left(\frac{fw}{(mw + other)} \right) 100$	3.1 - 3.11, 4.1 - 4.4
Fw	Individual farm's totalled weights of indicators actually present	**N/A**	3.1 - 3.11
Mw	Maximum possible weighted total of all indicators on a farm (251,24)	**N/A**	3.1 - 3.11
other	The total weight of "other" category indicators for a farm	**N/A**	3.10
R	Actual (real) number of indicators on a wine route for an indicator category	**N/A**	3.1 - 3.11

Table 2.8 continued overleaf

Table 2.8 continued

SYMBOL	DESCRIPTION	FORMULA	OCCURRENCE IN STUDY (SECTION)
P	Potential (possible) number of indicators on a wine route for an indicator category	**N/A**	3.1 - 3.11
A	Average number of indicators on a wine route for an indicator category	$A = \left(\frac{R}{P}\right)100$	3.1 - 3.11
C&C	Average level of commercialisation and commodification for each indicator category in each wine route	$C\&C = \left(\frac{\sum cfw}{WR(cmw)}\right)100$	3.1 - 3.11
cfw	The total weight of all indicators in a category for a farm	**N/A**	3.1 - 3.11
Σcfw	The total weight of all indicators in a category for all farms in a wine route	**N/A**	3.1 - 3.11
cmw	The maximum possible indicator weight total for a category	**N/A**	3.1 - 3.11
Wr	The number of wine farms in a wine route	**N/A**	3.1 - 3.11
Fc&c	The commercialisation and commodification value for each wine farm in the SWR for an indicator category	$Fc\&c = \left(\frac{cfw}{cmw}\right)100$	3.1 - 3.11
Af	The number of farms that have indicators with a visitor capacity	**N/A**	3.1, 3.2, 3.7, 3.9
Tcap	The total number of visitors that can be catered for in a wine route per category	**N/A**	3.1, 3.2, 3.7, 3.9
Fcap	The average number of people who can be accommodated by the farms that indicated capacity numbers	$Fcap = \frac{Tcap}{af}$	3.1, 3.2, 3.7, 3.9
WRcap	The average number of people who can be received per wine route, including all farms	$WRcap = \frac{Tcap}{WR}$	3.1, 3.2, 3.7, 3.9

The indexes and values explained in this section are used in Chapters 3 and 4 to analyse, describe and interpret each of the commercialisation and commodification manifestation and indicator categories. The procedures followed are set out in the following sections.

2.4 FILLING THE GLASS: PROCEDURE OF PRESENTING THE RESULTS

The ten categories of commercialisation and commodification and their calculated indices and values are discussed in turn starting with the category with the highest average importance weight ranking (visitor facilities) and ending with the "other" category (see Table 2.7). Each category discussion in chapter 3 is divided into overview and analysis subsections.

2.4.1 Overview of results

Each category presentation commences with an *overview*, in which the basic results of the survey are given. The number of farms on which each indicator is found (**NO.**) and the percentage occurrence of each indicator (**%**) are given according to wine route in an *occurrences* table. Table 2.9 is an example.

Table 2.9: An example* of an indicator occurrences table for the SWR per wine route

	BOTTELARY HILLS		GREATER SIMONSBERG		HELDERBERG		STELLEN-BOSCH HILLS		STELLEN-BOSCHBERG		SWR	
INDICATOR	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**
Historical building(s)	3	21	6	25	8	32	8	44	4	36	**29**	**32**
Monument(s)	2	14	4	17	3	12	5	28	2	18	**16**	**17**
Museum / Historical display	1	7	4	17	3	12	4	22	1	9	**13**	**14**
Art gallery	1	7	1	4	3	12	1	6	1	9	**7**	**8**
Antique sales	0	0	0	0	1	4	1	6	0	0	**2**	**2**

* Heritage indicators (see section 3.5).

However, the various wine routes have different numbers of respondent farms. To facilitate wine route comparisons a *values and indices* table is provided for each category that summarises the *actual* and *possible* values and the *average* and *C&C* indices (see Section 2.3) for the individual wine routes and the entire Stellenbosch Wine Region. An example is shown in Table 2.10.

The occurrences and values/indices tables are examined for each category in conjunction with maps of the SWR showing the farm commercialisation and commodification levels (***Fc&c***).

Table 2.10: An example* of a values and indices table for the SWR per wine route

WINE ROUTE	NUMBER OF FARMS	REAL VALUE (*R*)	POSSIBLE VALUE (*P*)	AVERAGE INDEX (*A=R/P*)	*C&C* INDEX
Stellenbosch Hills	18	19	90	21.1%	21.7%
Stellenboschberg	11	8	55	14.5%	15.2%
Helderberg	25	18	125	14.4%	15.1%
Greater Simonsberg	24	15	120	12.5%	13.0%
Bottelary Hills	14	7	70	10.0%	10.3%
Stellenbosch Wine Region	92	67	460	14.6%	15.1%

* Heritage indicators (see section 3.5).

The ***Fc&c*** maps provide a visual perspective to the spatial distribution of the degree of commercialisation and commodification at farm level. The classes were determined for the entire study area by plotting all the calculated degrees of commercialisation and commodification (***C***) on a graph (see Appendix B). Four natural divisions in the plotted degrees where identified. These divisions are combined with a zero class (representing the absence of commercialisation and commodification manifestations and indicators) and form the limits of the five distinguished classes of commercialisation and commodification in this study (see Table 2.11).

Table 2.11: Classes of degrees of commercialisation and commodification per farm in the SWR

COLOUR SYMBOL	DEGREE OF COMMERCIALISATION AND COMMODIFICATION (*C*)
○	**0% : NONE**
●	**1% - 24% : LOW**
●	**25% - 37% : AVERAGE**
●	**38% - 49% : MODERATE**
●	**50% - 100% : HIGH**

A coloured symbol plotted at an individual farm's location indicates the farm's calculated commercialisation and commodification level for a specific category.

Farms with no manifestations in a particular category have no ***Fc&c*** value and therefore have an empty circle plotted at their respective location. Every farm's level is plotted on each ***Fc&c*** map for every indicator category. The classes in Table 2.11 are also used in Chapter 4 in the final map and discussion of the overall degrees of commercialisation and commodification for each wine farm in the SWR (***C***).

2.4.2 Analysis of results

The category overviews are followed by *analysis* sections. The analyses provide further insights, comparisons and explanations of the results presented in the overviews. Where applicable, the capacity information is presented in *capacity* tables, namely the numbers of farms in the wine routes and the three capacity values (***Tcap, Fcap*** and ***WRcap***). An example is shown in Table 2.12.

Table 2.12: An example* of a facility capacity table for the SWR per wine route

WINE ROUTE	NO. OF FARMS (TOTAL)	NO. OF FARMS (CAPACITY)	TOTAL CAPACITY (*Tcap*)	FARM CAPACITY (*Fcap*)	WINE ROUTE CAPACITY (*WRcap*)
Stellenbosch Hills	18	2	355	178	20
Stellenboschberg	11	3	142	47	13
Greater Simonsberg	24	8	76	10	3
Helderberg	25	7	57	8	2
Bottelary Hills	14	3	15	5	1
Stellenbosch Wine Region	92	23	645	28	7

* Accommodation facilities (see section 3.9).

The capacity values tables give an indication of wine farm size and a further impression of the extent of commercialisation and commodification in the particular manifestation category.

2.5 TASTING THE WINE: PROCEDURE OF INTERPRETING FINDINGS

The interpretation of the study results and the calculated SWR wine farms' various degrees of commercialisation and commodification (***C***) is also structured in *overview* and *analysis* sections in chapter 4. The overview section summarises the farm's degrees of commercialisation and commodification according to wine route arranged by the five classes of degrees of commercialisation and commodification (see Table 2.11). The classes are explained and characterised in a description of what

manifestations and indicators typify a farm in a particular class. Each farm's overall degree of commercialisation and commodification is mapped with an explanation following in the analysis section.

The analysis attempts to explain the degrees of commercialisation and commodification in terms of six factors, namely:

- wine farm membership of SAEWR
- efforts by wine farm to encourage wine tourism
- primary attraction of wine farm
- wine farm size
- wine farm accessibility
- wine farm ownership.

These factors are used to examine the study findings to seek out explanations and relationships that influence the degree and distribution of wine farm and wine route commercialisation and commodification in the SWR.

2.6 THE ROUTE: RESEARCH DESIGN

In order to facilitate a better understanding of the methodology of this research and to assist replication, Figure 2.1 diagrams the order of research procedures.

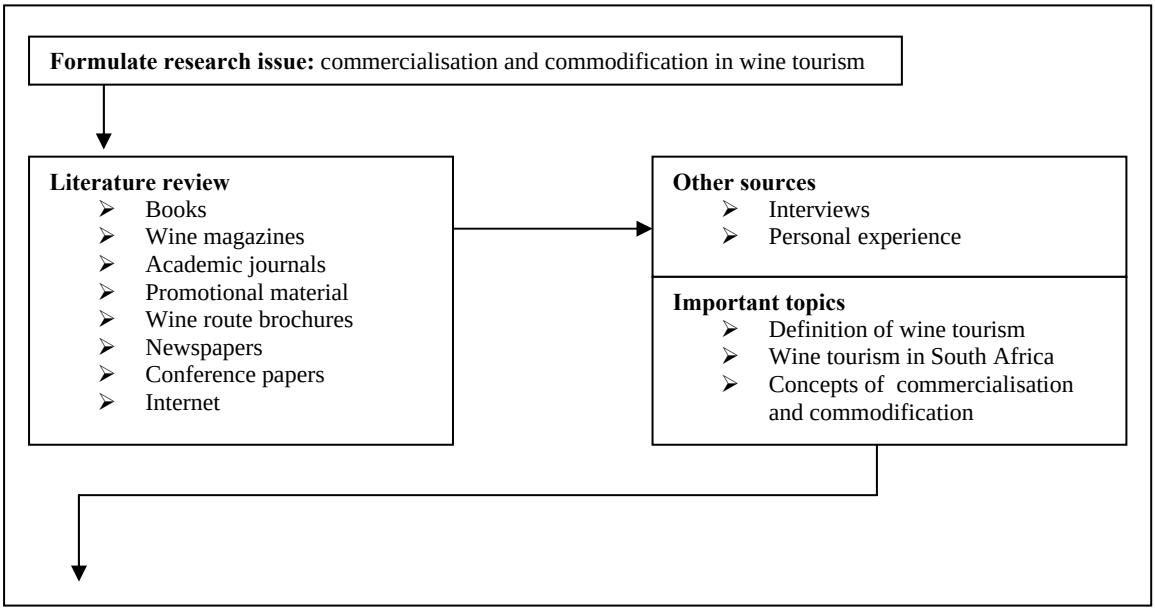
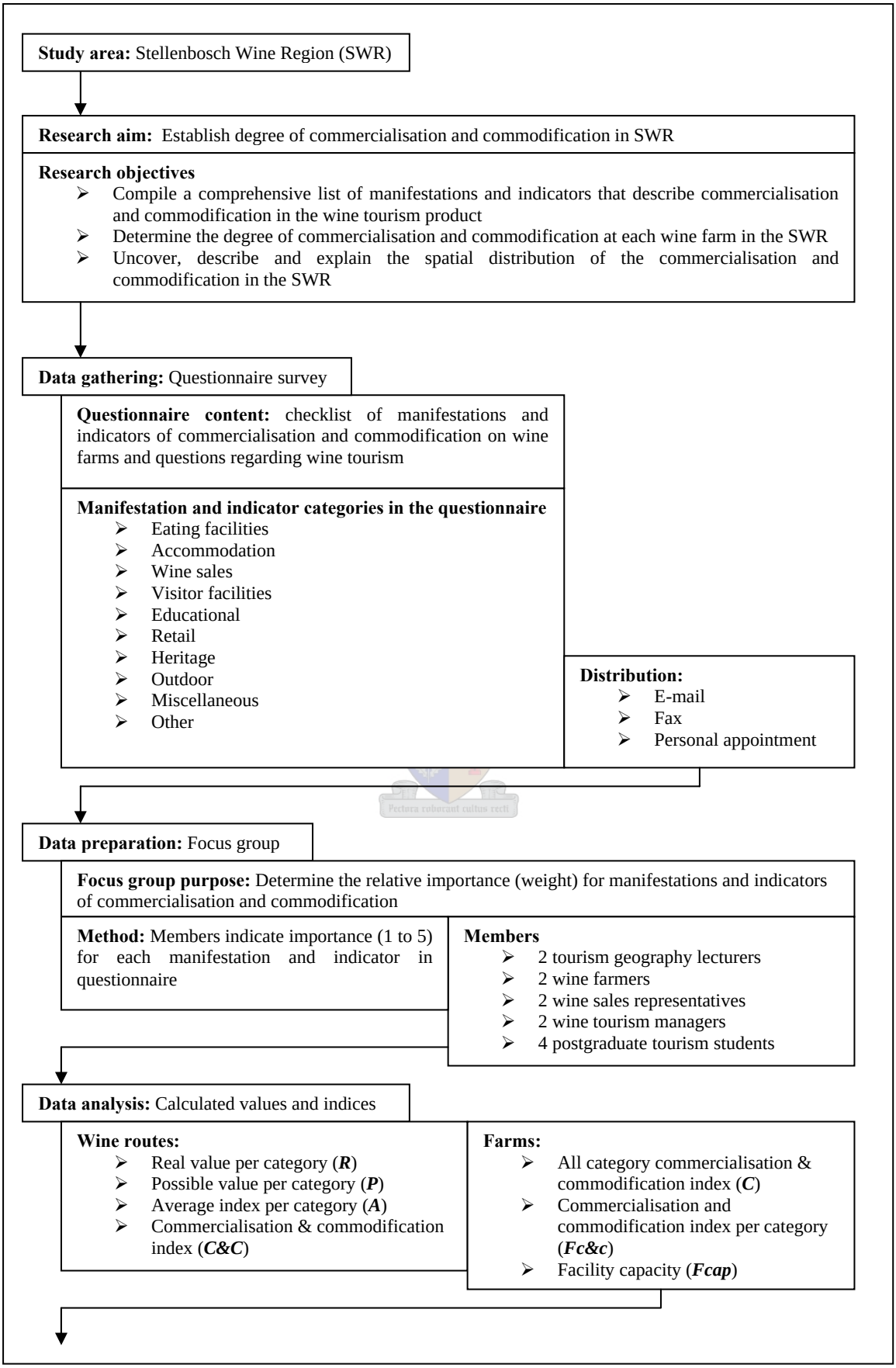


Figure 2.1 continued overleaf

Figure 2.1 continued



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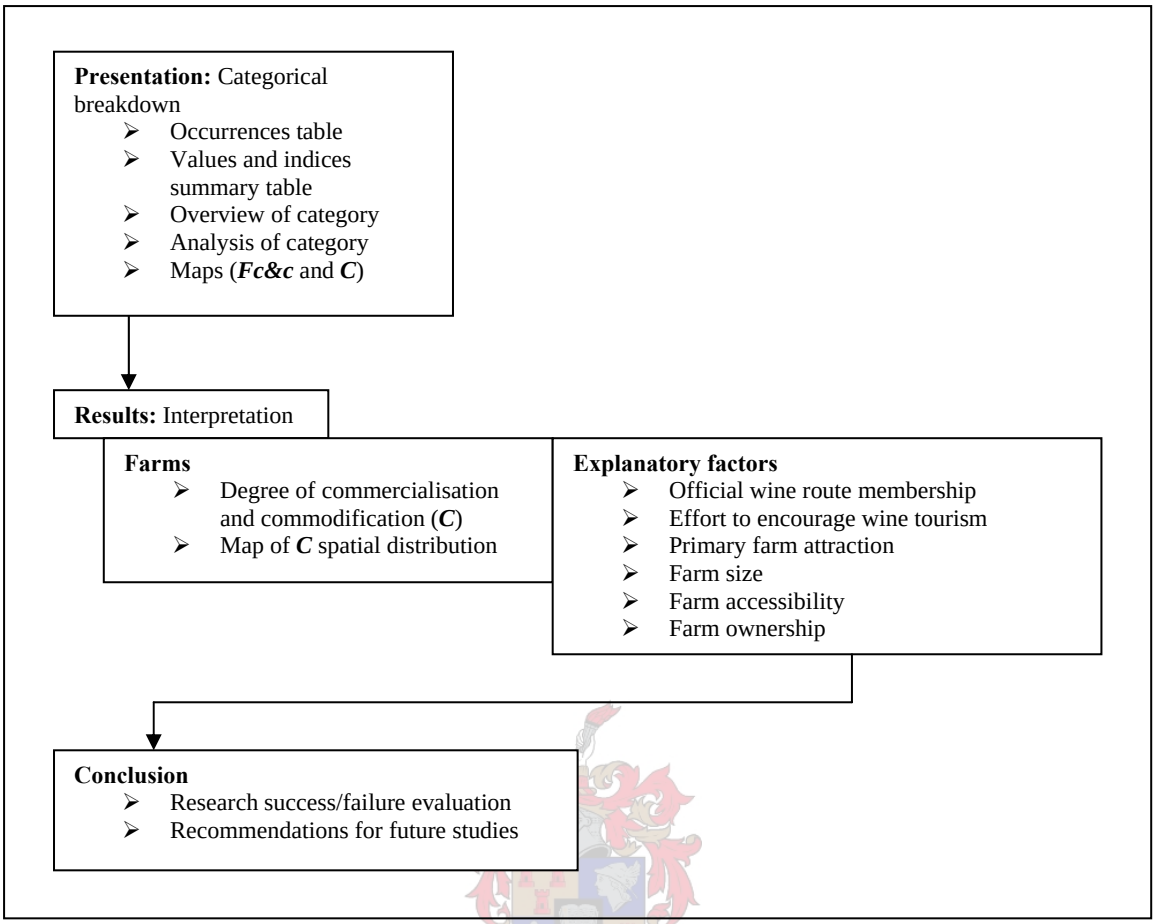


Figure 2.1: Research design for studying commercialisation and commodification of wine farms in the SWR

This research design summarises the research procedure followed in this thesis. The results, the findings and the interpretations and conclusions are set out in the next three chapters respectively.

3. POURING THE WINE: RESEARCH RESULTS

This chapter documents the results of the study according to wine farms and wine routes. Each of the ten categories of manifestations of commercialisation and commodification is discussed individually. The categories are overviewed using the occurrence, value and index tables, and Fc&c maps illustrating individual farm commercialisation and commodification levels. Each category is also examined under an analysis heading using the facility capacity values and a number of explanatory variables.

3.1 WINE GLASSES FOR ALL: VISITOR FACILITIES

This category of manifestations and indicators includes the general amenities and basic tourist related services provided by the wine farms. They are not necessarily wine-related, rather they underlie and enhance the tourists' visits to the farms.

3.1.1 Overview of visitor facilities

The importance of the visitor facilities category is demonstrated not only by its topmost ranking in the average focus group weightings (see Table 2.7), but also in the frequent occurrences (NO.) and farm proportions (%) summarised in Table 3.1. Most noticeably, this category has higher frequencies and proportions than all of the other categories, including wine sales.

Table 3.1: Visitor facilities per wine route in the SWR, 2002

	BOTTELARY HILLS		GREATER SIMONSBERG		HELDERBERG		STELLEN-BOSCH HILLS		STELLEN-BOSCHBERG		SWR	
INDICATOR	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**
Drinking water	14	100	24	100	25	100	18	100	11	100	**92**	**100**
Parking – Cars	14	100	24	100	25	100	18	100	11	100	**92**	**100**
Toilets	14	100	23	96	25	100	18	100	11	100	**91**	**99**
Signage / Directions	11	79	23	96	21	84	16	89	7	64	**78**	**85**
Brochures / Pamphlets	13	93	14	58	20	80	18	100	10	91	**75**	**82**
Tour group arrangements	8	57	16	67	18	72	12	67	7	64	**61**	**66**
Reception / Information centre	9	64	16	67	15	60	12	67	7	64	**59**	**64**
Disabled facilities	11	79	12	50	12	48	15	83	6	55	**56**	**61**
Parking - Tour bus	8	57	12	50	12	48	11	61	6	55	**49**	**53**
Child's playground	1	7	7	29	6	24	6	33	3	27	**23**	**25**

The general occurrence of drinking water and parking for cars is not surprising as they are basic requirements of locations visited by tourists. What is surprising is that toilet facilities are not found on all the wine farms. Although only one farm did not report public toilet facilities, it was expected that wine farms open to the public would do so, especially considering that toilets have the highest importance weighting in this category (4.67).

Signage and directions to the wine farms is also an indicator with lower than expected occurrence values. The Helderberg (84%), Bottelary Hills (79%) and most significantly, Stellenboschberg (64%) wine routes are all below the SWR average of 85 percent. Although an 85 percent average for the SWR appears high, signage and directions is the second most important manifestation according to the importance weights (4,58). The question arises how the other 15 percent of the farms expect visitors to find their location? However, Nowers, De Villiers & Myburgh (2000) point out that policies regarding signage change quite often, resulting in frustration amongst tourism organisations.

Brochures/pamphlets is an indicator for which two routes have averages below the SWR average of 82 percent, namely Helderberg (80%) and Greater Simonsberg (58%). Most noticeable is that this manifestation has 100 percent occurrence in Stellenbosch Hills while in Greater Simonsberg the occurrence average is 58 percent. This 42 percent range difference indicates the most uneven indicator distribution in this category.

Arrangements with tour group operators, although reported on two out of three farms in the SWR, has an average frequency value lower than expected considering that this indicator has the joint third highest importance weight in this category (4.33). Also, only the Bottelary Hills route reported the same frequency of tour bus parking as tour group arrangements. All the other routes report more tour group arrangements than bus parking facilities – probably an indication of not distinguishing between parking for cars and buses.

Reception areas and information centres are equally present (or absent) on the wine routes with an average occurrence of just under two thirds (63%). However, having a joint third highest importance rating (4.33) in this category, their presence is lower than expected. The availability of facilities for physically disabled persons varies widely among the five routes

(less than 50% to more than 80%). Children's playground is the least occurring manifestation with only one in every four of the wine farms having one.

These values are used to calculate each farm's level of commercialisation and commodification for the visitor facilities category (Fc&c). The overall spread of high levels of visitor facilities manifestations throughout the study area is illustrated in Figure 3.1 with only 5 farms not reaching the highest class (50%-100%). Stellenbosch Hills is the only wine route in the SWR with every farm having an Fc&c value in the high class range. This wide distribution of the highest class values demonstrates the importance of visitor facilities and confirms the top ranking of the category in terms of importance weights.

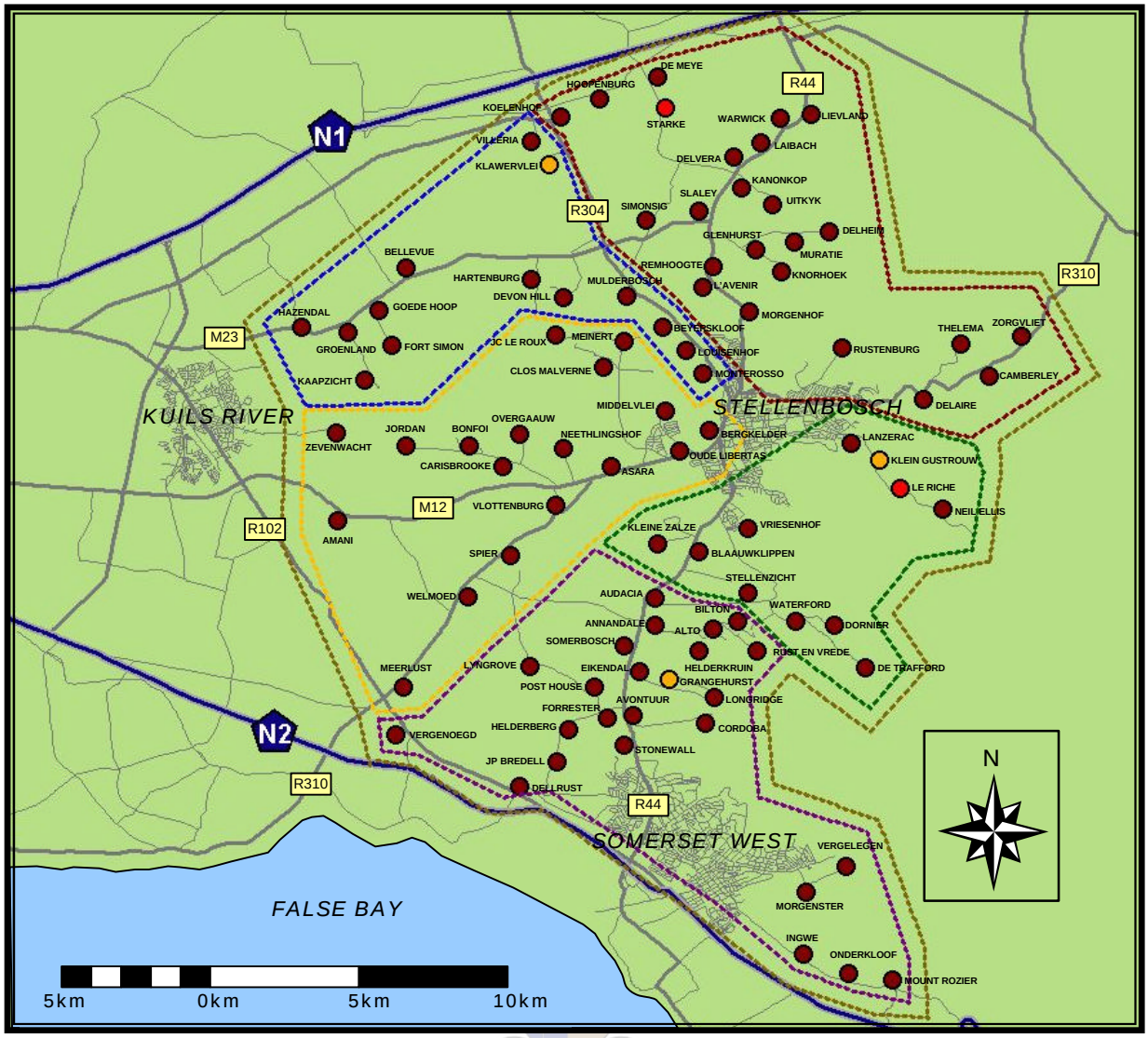
This category's importance in the SWR is further summarised in Table 3.2, which shows the high average and C&C indexes of over 73 percent for all five wine routes and the SWR as a whole.

Table 3.2: Calculated scores for visitor facilities per wine route in the SWR, 2002

WINE ROUTE	NUMBER OF FARMS	REAL VALUE (*R*)	POSSIBLE VALUE (*P*)	AVERAGE INDEX (*A=R/P*)	*C&C* INDEX*
Stellenbosch Hills	18	144	180	80.0%	77.4%
Bottelary Hills	14	103	140	73.6%	75.5%
Greater Simonsberg	24	171	240	71.3%	75.4%
Helderberg	25	179	250	71.6%	73.3%
Stellenboschberg	11	79	110	71.8%	73.2%
Stellenbosch Wine Region	92	676	920	73.5%	75.0%

$$* \; C\&C \; = \left(\frac{\sum cfw}{WR(cmw)} \right) 100$$

Stellenbosch Hills has both the highest average and C&C index for visitor facilities, well above the SWR aggregates. With every farm on the route having an Fc&c level in the highest class, Stellenbosch Hills has the highest concentration of visitor facility manifestations relative to the number of farms as indicated by the average index. The route also has the highest degree of commercialisation and commodification per route as indicated by the C&C index for the visitor facilities category. The Stellenboschberg and Helderberg routes have equally "low" C&C index scores. However, the strength of this category is exemplified by the fact that all the C&C indices are at the high level (50%-100%).



COMMERCIALISATION AND COMMODIFICATION LEVELS	
	NO FACILITIES
	1% - 24%: LOW
	25% - 37%: AVERAGE
	38% - 49%: MODERATE
	50% - 100%: HIGH

NATIONAL ROADS
MAIN ROADS
FARM ACCESS ROADS
URBAN AREAS
ATLANTIC OCEAN
STELLENBOSCH WINE REGION
BOTTELARY HILLS
GREATER SIMONSBERG
HELDERBERG
STELLENBOSCH HILLS
STELLENBOSCH-BERG

THE COLOUR-CODED SYMBOL PLOTTED AT A FARM LOCATION INDICATES THE CLASS INTO WHICH THE FARM'S DEGREE OF COMMERCIALISATION AND COMMODIFICATION (*Fc&c*) OF VISITOR FACILITIES FALLS

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Figure 3.1: Wine farm levels of commercialisation and commodification (***Fc&c***) based on visitor facilities in the SWR, 2002

3.1.2 Analysis of visitor facilities

The fact that this category consists of facilities and services that are fundamental to tourism and visitor needs, confirms the widespread distribution of high levels of visitor facilities and services. No wine farm in the study area has none of the visitor facility manifestations while only five have lower than high Fc&c levels - three being in the average (25%-37%) class and two in the moderate (38%-49%) class (see Figure 3.1).

There are a number of possible reasons for this lesser possibility or desire of wine farms to encourage visitors, namely limited wine output, fewer farm resources and, most importantly, restricted finances. However, in contrast to limiting the number of visitors, some wine farms equate success with arranging and providing facilities for the largest number of visitors possible (Dodd & Bigotte, 2000). The number of visitors that can be catered for on a farm is determined by the capacity of visitor facilities (see Table 3.3).

Table 3.3: Capacities of all visitor facilities per wine route in the SWR, 2002

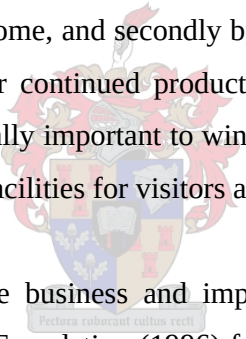
WINE ROUTE	NO. OF FARMS (TOTAL)	NO. OF FARMS (CAPACITY)	TOTAL CAPACITY (*Tcap*)	WINE ROUTE CAPACITY (*WRcap*)	FARM CAPACITY (*Fcap*)
Stellenbosch Hills	18	18	2225	124	124
Greater Simonsberg	24	24	1975	82	82
Stellenboschberg	11	11	766	70	70
Helderberg	25	25	1524	61	61
Bottelary Hills	14	14	523	37	37
Stellenbosch Wine Region	92	92	7013	76	76

All of the farms in the SWR provided capacity data for visitor facilities. This explains why the WRcap value (the average calculated for all the wine farms in a route) is the same as the Fcap value (the average calculated only for farms with capacity data). Capacity in this category is strongly influenced by the presence of large wine farms known as *wine destinations*. This is illustrated by the Stellenbosch Hills route, which does not have the most wine farms, but has the largest total visitor capacity and average capacities owing to several farms having very large capacities, well in excess of the SWR averages. Thus the Stellenbosch Hills route has seven wine destination farms with capacities greater than the 76 SWR average, three of which have capacities in excess of 300. These three farms are Neethlingshof (2002), Zevenwacht (2002) and Spier (2002). The latter has the greatest visitor

capacity in the SWR, namely 800 visitors. The Greater Simonsberg route also has seven farms with above SWR averages but only has two farms with capacities over 300, namely Morgenhof (2002) and DelVera (2003).

The Helderberg route has five farms with capacities higher than the SWR figure, while the Stellenboschberg route has three such farms. However, both these routes only have one farm capable of handling 300 visitors, namely Vergelegen (2002) on the Helderberg route, and Lanzerac (2002) on the Stellenboschberg route. The farm with the greatest capacity in the Bottelary Hills route is also the only farm above the SWR average, namely Hazendal (2002) with a capacity of 80. Based on the occurrence values and indices, and the Fc&c levels and the scores in Table 3.3, capacity is a direct indicator of the level of commercialisation and commodification present on a wine farm.

The importance of visitor facilities stems from the important role visitors play in the successful implementation of wine tourism as a business strategy. Visitors fulfil two functions, firstly as a source of income, and secondly by providing a trial and test service for new products so determining their continued production or rejection (Hooke, 1997). The recognition of visitors as being vitally important to wine tourism is illustrated throughout the SWR in that every wine farm has facilities for visitors and wine tourists.



Whether wine tourism is the core business and important income source of a farm, as identified by the Australian Wine Foundation (1996) for smaller farms, or those which have chosen wine-making as a lifestyle, or whether wine tourism is only a secondary or subsidiary source of income or a sideline to the farm's major wine operation (Hall et al. 2000), prioritising the visitor is clearly essential to a successful wine tourism business strategy. The above results confirm this priority regarding visitor facilities on the wine farms of the five wine routes in the SWR. The sale of wine to the farm visitors is a further priority, which is discussed in the following section.

3.2 ANOTHER BOTTLE PLEASE: WINE SALES

This category involves services and facilities provided for the visiting public to taste and buy wine. The category comprises the most manifestations and indicators of all the categories in

the study, namely 17, and includes the many diverse wine tasting and sales techniques and facilities found in the wine tourism industry.

3.2.1 Overview of wine sales

The wine sales category is second to visitor facilities in the focus group average weightings (Table 2.7). The frequencies of the wine sales indicators are summarised per wine route in Table 3.4.

Table 3.4: Occurrence of wine sales category indicators per wine route in the SWR, 2002

	BOTTELARY HILLS		GREATER SIMONSBERG		HELDERBERG		STELLEN-BOSCH HILLS		STELLEN-BOSCHBERG		SWR	
INDICATOR	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**
Sell own wine	14	100	23	96	25	100	18	100	11	100	**91**	**99**
Specific sales/tasting area	13	93	23	96	21	84	17	94	10	91	**84**	**91**
Wine purchases delivery service	12	86	23	96	23	92	17	94	9	82	**84**	**91**
Standing tasting area	13	93	21	88	21	84	18	100	10	91	**83**	**90**
Trained staff	11	79	23	96	21	84	18	100	9	82	**82**	**89**
Mail-order sales	10	71	21	88	21	84	17	94	10	91	**79**	**86**
Seated tasting area	12	86	17	71	21	84	16	89	10	91	**76**	**83**
Comfort areas	11	79	18	75	19	76	17	94	6	55	**71**	**77**
Open on public holidays	9	64	20	83	11	44	13	72	8	73	**61**	**66**
Internet sales	9	64	15	63	16	64	13	72	5	45	**58**	**63**
Tasting fee levied	5	36	12	50	13	52	16	89	8	73	**54**	**59**
Wine festivals	6	43	11	46	9	36	4	22	4	36	**34**	**37**
Open on Sundays	3	21	9	38	4	16	6	33	4	36	**26**	**28**
Open by appointment only	2	14	4	17	10	40	2	11	2	18	**20**	**22**
Wine auctions	1	7	7	29	5	20	4	22	2	18	**19**	**21**
Sell other grape products	2	14	4	17	4	16	4	22	1	9	**15**	**16**
Sell other wines	0	0	2	8	0	0	4	22	1	9	**7**	**8**

Most noticeable in Table 3.4 is that every farm in the SWR, except one, sells their own wine. DelVera (2003) on the Greater Simonsberg route is an anomalous case in that it does not produce its own wine. However, DelVera is owned by the Delheim wine farm and the DelVera wine shop (The Vineyard Connection) acts as a point of sales for a selection of South African wines, including Delheim's. Such sale of other wine brands is not isolated to this farm though, as a number of the farms in the SWR sell other wines. This is limited to farms owned by wine companies though, which control a number of wine farms or co-operatives where all the company brands are on offer. Regardless of brand, the emphasis in the SWR is on selling wine given that the sale of other grape products has a minimal occurrence of 16 percent.

The presence of a specific sales or tasting area is an indicator which, surprisingly, is not found throughout the SWR. This facility is most absent on the Helderberg route where only 84 percent of the farms reported their presence. This can be explained by the fact that some wine farms, particularly new or small farms such as Post House (Helderberg route) or Starke (Greater Simonsberg route), often sell their wine or offer wine tasting direct from the farm homestead or cellar without building a specific sales or tasting area. Overall, the occurrence is still lower than expected given the high importance weight (4.42) of this manifestation.

The most widespread form of tasting area is the standing variety, with a fairly even distribution throughout the routes and having a SWR average of 90 percent of the respondent farms. Seated tasting areas are 7 percent fewer than standing areas. This is surprising considering that seated tasting areas have an importance weight of 4.25 compared to the 3.83 of standing areas, but can be explained in terms of space, as more standing patrons can fit into a small area and the provision of seating implies furnishings requiring greater capital outlays and more maintenance.

Related to seated areas are comfort areas which occur on 3 out of every 4 respondent farms. This is lower than expected as comfort areas include seating and shaded areas and the importance weighting of 3.92 is above the SWR average of 3.78 for the wine sales category. A fee levied on visitors to taste wine occurs on even fewer farms (only 59 percent of the SWR) but this is more than the (equal) second lowest importance weight (3.08) would suggest.

The use of trained staff for wine sales and tasting is found on 89 percent of the farms. This is a lower proportion than expected considering that it has the highest importance weight (4.67) in this category. This could be explained by the farms that do not have trained staff being small or family owned, with tasting and sales organised by family members or farm employees with no specific training. A mail-order sales option is quite common in the SWR (86%) while its modern contemporary, Internet sales, is not yet as prevalent (63%). Internet selling occurred surprisingly less than expected as it was assumed that the global accessibility would make e-business very attractive. Delivery services for these and all other wine purchases made by customers are available on 91 percent of the farms in the SWR.

The question of opening times provided some unexpected results. Two thirds of the SWR farms are open on public holidays, which is low considering the high importance weight (4.42) given to this manifestation. Less than one third (28%) of the SWR farms open on Sundays, these being the larger wine destinations such as Spier (Stellenbosch Hills route) and DelVera (Greater Simonsberg route). Farms that open only by appointment are even fewer (22%), but these are either small or family run farms such as Remhoogte (Greater Simonsberg route) and Onderkloof (Helderberg route).

Wine festivals (37%) and wine auctions (21%) have unexpectedly low occurrences given that wine festivals and auctions are considered in the wine industry to be high profile promotional and marketing tools and the importance ratings for these two manifestations, 3.83 for festivals and 3.08 for auctions, would suggest greater occurrences.

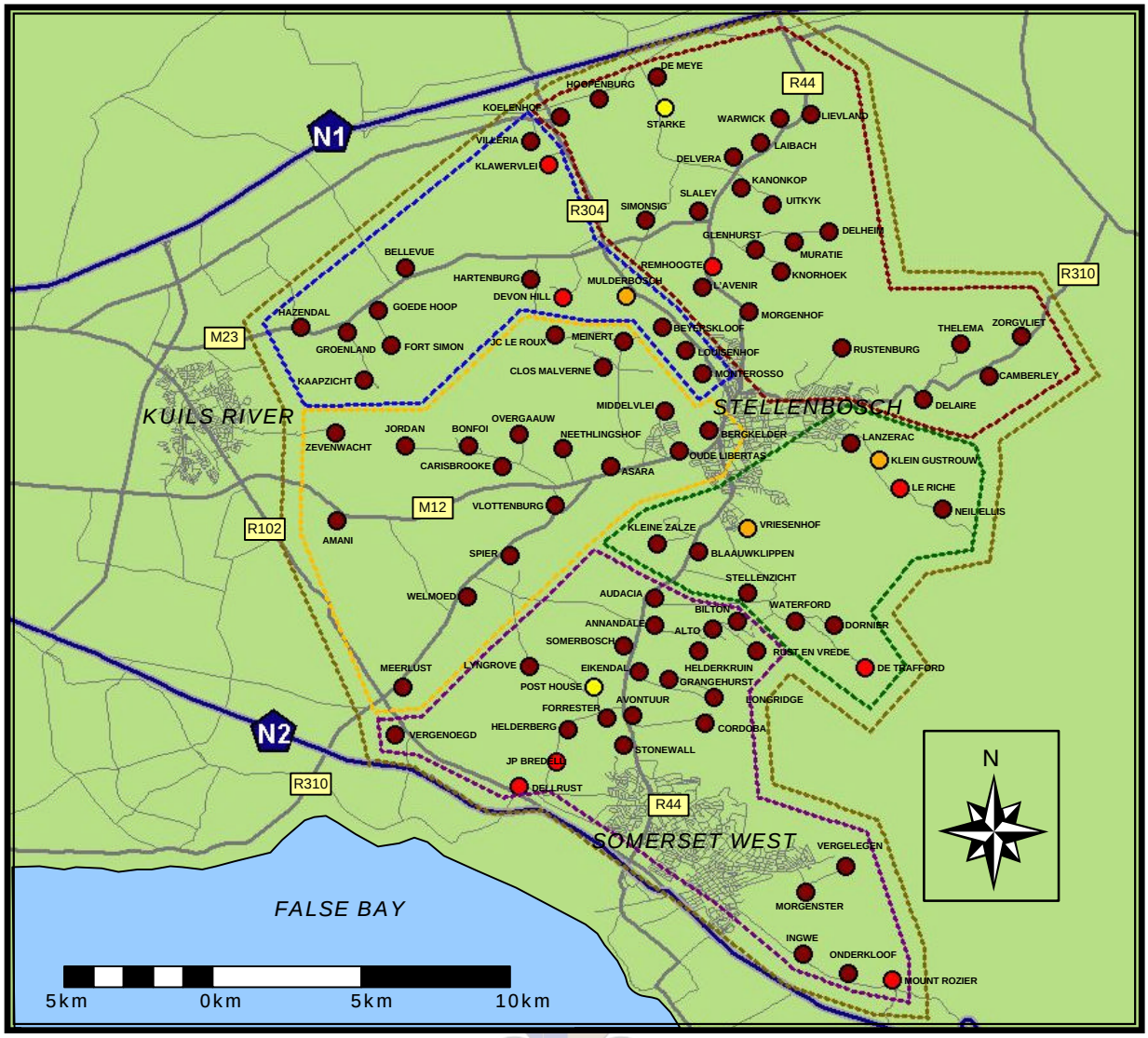
The effect of the larger number of indicators in the wine sales category can be seen in Table 3.5 where the possible values are the highest of all the categories. However, the average indices are still high (all in the 50%-100% class), with the C&C index values being even higher, demonstrating the importance of this category. This is further supported in the regionwide distribution of high Fc&c levels in Figure 3.2.

Table 3.5: Calculated scores for the wine sales category per wine route in the SWR, 2002

WINE ROUTE	NUMBER OF FARMS	REAL VALUE (*R*)	POSSIBLE VALUE (*P*)	AVERAGE INDEX (*A=R/P*)	*C&C* INDEX*
Stellenbosch Hills	18	204	306	66.7%	70.3%
Greater Simonsberg	24	253	408	62.0%	66.0%
Stellenboschberg	11	110	187	58.8%	62.2%
Helderberg	25	243	425	57.2%	60.2%
Bottelary Hills	14	133	238	55.9%	59.8%
Stellenbosch Wine Region	92	944	1564	60.4%	63.9%

* $C\&C = \left(\frac{\sum cfw}{WR(cmw)} \right) 100$

Although the Greater Simonsberg route has the most actual manifestations of wine sales (highest real value), the Stellenbosch Hills wine route has the highest average index thereby indicating the greatest concentration of wine sales manifestations relative to the number of wine farms. Furthermore, all of the Stellenbosch Hills route's farms have Fc&c levels in the highest scale class (see Figure 3.2).



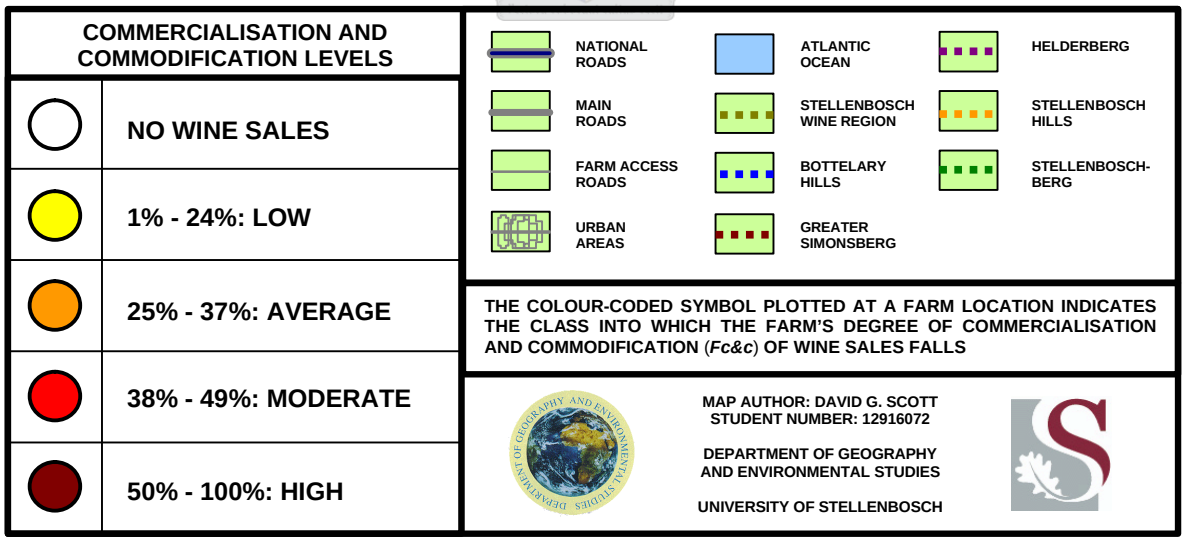


Figure 3.2: Wine farm levels of commercialisation and commodification (***Fc&c***) for the wine sales category in the SWR, 2002

Not surprisingly, this wine route has the highest C&C index value, indicating the greatest degree of commercialisation and commodification per route for the wine sales category. The lowest average values and C&C indices are found in the Bottelary Hills, Helderberg and Stellenboschberg routes, where these figures are all within 3 percent of one another. However, they all remain in the high (50%-100%) class with only 13 farms in the entire SWR outside the highest Fc&c level class. All of these thirteen farms are family owned or have smaller, developing cellars.

Figure 3.2 shows that the Greater Simonsberg and Helderberg wine routes are the only routes to have a farm with a wine sales Fc&c level in the low category, namely Starke and Post House respectively, and Stellenboschberg and Bottelary Hills are the only routes to have farms with average Fc&c levels in the wine sales category. The widespread distribution of high Fc&c levels shown in Figure 3.2 supports the closeness of the wine routes' average values and C&C indices to one another and the SWR figures in Table 3.5.

3.2.2 Analysis of wine sales

The wine sales category is the most comprehensive in terms of the number (17) of manifestations and indicators of commercialisation and commodification. The strength and size of this category resides in the fact that wine tourism is essentially a means to sell wine and the principle purpose of developing wine tourism for the majority of wine farms worldwide is to generate immediate and profitable sales (Dodd & Bigotte, 2000).

The recent rapid growth in the number of wine producers in the study area implies a multitude of newly established wine farms, where the international trend to "sell most of their wine at the cellar door and develop a mail-order list, and gain an essential source of cash flow in these early stages" (Gillion, 1998: 13) holds true. Every farm included in the study presents all or some manifestation of the wine sales category, therefore each route's WRcap and Fcap values are the same. However, there is a degree of variation among the individual wine routes regarding the numbers of visitors they can handle (see Table 3.6).

Table 3.6: Visitor capacity of all wine sales facilities per wine route in the SWR, 2002

WINE ROUTE	NO. OF FARMS (TOTAL)	NO. OF FARMS (CAPACITY)	TOTAL CAPACITY (*Tcap*)	WINE ROUTE CAPACITY (*WRcap*)	FARM CAPACITY (*Fcap*)
Stellenbosch Hills	18	18	795	44	44
Greater Simonsberg	24	24	735	31	31
Bottelary Hills	14	14	398	28	28
Helderberg	25	25	667	27	27
Stellenboschberg	11	11	283	26	26
Stellenbosch Wine Region	92	92	2878	31	31

The Stellenbosch Hills and Greater Simonsberg routes have the wineries with the largest total capacities to serve and sell wine in terms of the number of wine tasters who can be accommodated in their tasting areas. Eight farms in the Stellenbosch Hills route exceed the SWR average of 31 persons, including Neethlingshof (2002) that has the largest capacity (170) for this category. The Greater Simonsberg route has seven wine farms with capacities in excess of the SWR average while the Bottelary Hills and Helderberg wine routes both have five farms with such capacities. The Stellenboschberg route has the least wine farms with capacities higher than the SWR average, namely four.

Although large and expansive tasting areas inherently have higher running costs, they also imply a heightened potential to secure more sales. However, all of the farms in the SWR with large wine tasting areas are well-known and popular wine destinations, where the tasting facilities form part of the destinations with their many other attractions and visitor facilities. As such, capacity is an indication of the level of commercialisation and commodification on a wine farm.

However, customer-handling capacity is only one aspect of the wine sales category. The wine sales indicator with the highest importance weight (4.67) is trained sales and tasting staff, who are present on 89 percent of the farms. The importance of knowledgeable and skilled staff, along with reliable and friendly customer service, is simply that they are the representatives of a winery and are the first and most direct contacts with tourists. Most of the wine farms that have such staff, provide their own in-house training while a number of the larger company-owned farms require employees to attend special tourism and customer service workshops and seminars (Stapelberg, 2002, pers com).

The 11 percent of the wine farms that do not employ trained staff to serve visitors are small or family owned, following either a practice of the winemaker or the farm owner (both inherently knowledgeable) facilitating wine tasting and sales, or a system of opening to the public by appointment only, again with the winemaker or the farm owner responsible for tasting and sales. However, half of the farms which open by appointment only, do have trained staff, indicating an ambiguity in what respondents consider to be “trained”.

Linked to the issue of sales by appointment is the question of wine farm open-times. Normal business hours are not strictly applied in the SWR. Two thirds of wine farms do open on public holidays and only 28 percent open their premises on weekends, the latter being identified by Nowers, De Villiers & Myburgh (2000) as the most popular days in a week that wine farms are visited in the Western Cape. Furthermore, a special licence above and beyond the regular liquor sales licence is required for wine farms wishing to sell wine on Sundays (De Kock, 2002, pers com). In the Australian experience, Hall & Jenkins (1998) have recommended the employment of a consistent and region-wide policy regarding open and closed times and days so to avoid frustrating tourists, particularly as wine sales is a prime reason for encouraging visits.

Having established the importance of cellar door wine sales, the presence of services such as Internet and mail-ordering, along with delivery services for these wine purchases becomes clearer. The relatively high occurrence of Internet and mail-order sales manifestations is because they expand the market reach of a wine farm and their wine brand or wine range. This is achieved by the customer not being required to visit a farm itself to purchase and enjoy the wine, and more importantly the fact that such facilities are a form of marketing and advertising (Boniface, 2003). The proliferation of many e-commerce and wine trading websites and companies offering wine reviews, farm locations and ordering information is a testament to this (South African Wines, 2002). Delivery services are important because a wine order can only be as big as the means available to transport it, and the study confirmed that 9 out of 10 wine farms in the SWR arrange delivery on the customer’s behalf.

Wine sales is a foundation of wine tourism, as illustrated by this category having the most manifestations in this study, and further by these manifestations having roles which are prerequisites to supplying the wine tourism product to wine farm visitors. The widespread distribution of high scoring values and indices in this category is supported by its overall

second highest focus group weighting thereby underlining the importance of wine sales to wine tourism in the SWR. The education of tourists about wine is closely associated with wine sales as set out next.

3.3 DRINK FOR THOUGHT: EDUCATION

This category includes those activities and services offering knowledge and information about or better understanding of wine farming, wine making and wine tasting.

3.3.1 Overview of educational manifestations

Although the education category scored third highest in the importance weight averages (Table 2.7), it has considerably lower manifestation occurrences compared to the previous two categories (see Table 3.7).

Table 3.7: Occurrence of educational manifestations per wine route in the SWR, 2002

	BOTTELARY HILLS		GREATER SIMONSBERG		HELDERBERG		STELLEN-BOSCH HILLS		STELLEN-BOSCHBERG		SWR	
INDICATOR	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**
Personalised tours by appointment	9	64	19	79	23	92	14	78	9	82	**74**	**80**
Guided cellar tours	8	57	9	38	12	48	11	61	7	64	**47**	**51**
Guided vineyard tours	3	21	7	29	5	20	6	33	2	18	**23**	**25**
Instructional books / Leaflets	1	7	5	21	2	8	4	22	0	0	**12**	**13**
Hands-on experiences	2	14	2	8	0	0	2	11	1	9	**7**	**8**
Wine barrel-making	0	0	2	8	0	0	1	6	0	0	**3**	**3**
Wine-making courses	0	0	0	0	0	0	2	11	0	0	**2**	**2**
Wine-tasting courses	0	0	0	0	0	0	2	11	0	0	**2**	**2**

The most unexpected feature in the tabulated data is the high occurrence (80%) of personalised tours by appointment as opposed to the lesser frequency (51%) of guided cellar tours because the importance ratings of 3.42 and 4.00 respectively suggest the opposite. Conversely, guided vineyard tours have the same importance weighting (3.42) as personalised tours by appointment but they occur at only a quarter of all the wine farms. The more widespread distribution of personalised tours by appointment and the lesser occurrence of other tour forms could be attributed to limited staff. By scheduling suitable appointments, farmers, wine makers or other appropriate individuals can arrange and conduct tours without neglecting their primary farm duties.

The other educational manifestations and indicators have minimal frequencies, the most surprising being wine tasting courses which have the second highest importance rating in this category (3.92), but the least occurrence (2%). The education category's values and indices (Table 3.8) emphasise these low occurrences with the SWR average and C&C indices 37 and 40 percentage points respectively lower than the wine sales category. In terms of importance weighting, the difference between the education category (3.44) and the wine sales category (3.78) is small. However, the large difference between the two categories in terms of average and C&C indices, indicates that educational manifestations are less prioritised by the wine farms.

Table 3.8: Calculated scores for the educational manifestations per wine route in the SWR, 2002

WINE ROUTE	NUMBER OF FARMS	REAL VALUE (*R*)	POSSIBLE VALUE (*P*)	AVERAGE INDEX (*A=R/P*)	*C&C* INDEX*
Stellenbosch Hills	18	44	144	30.6%	29.5%
Greater Simonsberg	24	44	192	22.9%	23.2%
Stellenboschberg	11	19	88	21.6%	22.9%
Helderberg	25	42	200	21.0%	22.3%
Bottelary Hills	14	23	112	20.5%	21.7%
Stellenbosch Wine Region	92	172	736	23.4%	23.9%

* $C\&C = \left(\frac{\sum cfw}{WR(cmw)} \right) 100$

Stellenbosch Hills and the Greater Simonsberg wine routes have the greatest number (44) of actual educational manifestations and indicators with the Helderberg route having only two less. However, Stellenbosch Hills has fewer farms and so has the highest average index (the highest concentration of manifestations relative to route size). Stellenbosch Hills also has the highest C&C index by a clear 6 percent over the next highest route, Greater Simonsberg, thereby giving it the highest degree of commercialisation and commodification per route in terms of the educational category. Bottelary Hills has the lowest average and C&C indices, although there are only fractional differences between this route and the Greater Simonsberg, Stellenboschberg and Helderberg indices.

The relative dominance of Stellenbosch Hills in this category is further illustrated in Figure 3.3, with the route having half of all the SWR farms with high Fc&c levels. However, the most noticeable feature of Figure 3.3 is the lesser occurrence of high Fc&c levels compared

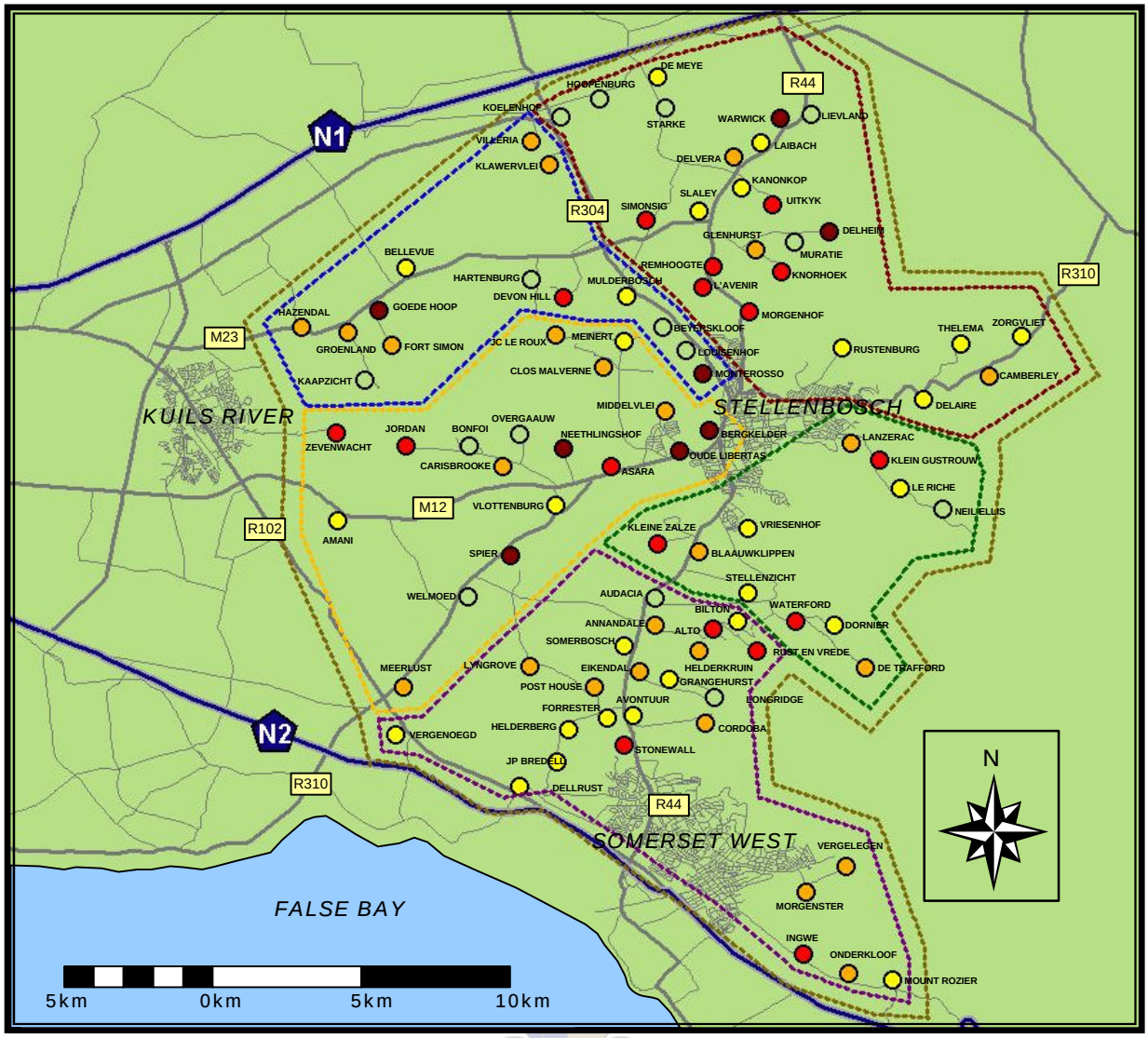
to the previous two categories and the widespread distribution of low, average and moderate Fc&c levels. The educational category also presents the first occurrence of farms without any manifestations or indicators of a category.

3.3.2 Analysis of educational manifestations

Despite the low occurrences and values, the importance of the educational side of wine tourism must not be underestimated given that this category has the third highest average weight after the visitor facilities and wine sales categories (see Table 2.7). Indeed, making educational opportunities available to wine farm visitors is listed in the literature as one of the essential requirements for a winery to establish a reputation (Vandecandelaere, 2002). Moreover, “learning about wine and wine making” along with “touring a winery” have been noted as specific reasons (other than tasting and purchasing wine) why tourists choose to visit a wine farm (Nowers, De Villiers & Myburgh, 2000: 3).

Furthermore, educational manifestations have positive impacts on the perception of wine tourism as a business strategy and its greater economic potential. Wine is one of those few commodities that is branded on the basis of its geographical location, namely the area and winery where it was produced (Hall et al. 2000). These elements of brand contribute to the appeal of a wine and a wine farm’s reputation. The promotion of an awareness and appreciation of wine brands can be expected to result in increased consumption and higher customer loyalty through the knowledge and interest generated by tourists visiting wine farms (Dodd & Bigotte, 2000). The importance of establishing such direct and personal educational links between producer and consumer is emphasised by four out of five of the SWR respondents offering personalised winery tours.

Personalised, cellar and vineyard tours are, however, the only educational manifestations for which their SWR averages exceed the overall SWR average. There is a marked shortage of courses in wine tasting or wine making. Only Bergkelder (2002) and Oude Libertas (2002), both in the Stellenbosch Hills route, offer such services. However, according to Michael Ratcliffe (2003, pers com), a wine lecturer and director of the Warwick Estate, such instruction is given formally by the Cape Wine Academy, with courses on wine tasting, wine making and wine tourism management.



COMMERCIALISATION AND COMMODIFICATION LEVELS	
	NO MANIFESTATIONS
	1% - 24%: LOW
	25% - 37%: AVERAGE
	38% - 49%: MODERATE
	50% - 100%: HIGH

NATIONAL ROADS
MAIN ROADS
FARM ACCESS ROADS
URBAN AREAS
ATLANTIC OCEAN
STELLENBOSCH WINE REGION
BOTTELARY HILLS
GREATER SIMONSBERG
HELDERBERG
STELLENBOSCH HILLS
STELLENBOSCH-BERG

THE COLOUR-CODED SYMBOL PLOTTED AT A FARM LOCATION INDICATES THE CLASS INTO WHICH THE FARM'S DEGREE OF COMMERCIALISATION AND COMMODIFICATION (*Fc&c*) FOR EDUCATIONAL MANIFESTATIONS FALLS

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Figure 3.3: Wine farm levels of commercialisation and commodification (***Fc&c***) for educational manifestations in the SWR, 2002

Although the theoretical and academic nature of such training is more inclined to satisfy the educational needs of the prospective wine-maker and farm owner, it remains important for the development and exposure of wine tourism in the SWR (Ratcliffe, 2003, pers com). The more diverse nature of wine tourism and its manifestations and indicators is examined in the next section.

3.4 MIXED BARRELS: MISCELLANEOUS

This category comprises some unusual and unique services and facilities made available for tourists on wine farms.

3.4.1 Overview of the miscellaneous category

Although scoring in the top five average weight rankings, the miscellaneous category is the first category with an average weight (3.19) less than the SWR average (see Table 2.7). The indicators contributing to this below par performance are shown in Table 3.9

Table 3.9: Occurrence of miscellaneous indicators per wine route in the SWR, 2002

	BOTTELARY HILLS		GREATER SIMONSBERG		HELDERBERG		STELLEN-BOSCH HILLS		STELLEN-BOSCHBERG		SWR	
INDICATOR	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**
Private function venue	5	36	6	25	9	36	10	56	4	36	**34**	**37**
Film location	3	21	5	21	8	32	11	61	4	36	**31**	**34**
Conference centre	3	21	3	13	2	8	8	44	3	27	**19**	**21**
Helipad	0	0	3	13	3	12	6	33	3	27	**15**	**16**
Amphitheatre	0	0	1	4	0	0	2	11	0	0	**3**	**3**
Sports facilities	0	0	1	4	0	0	1	6	0	0	**2**	**2**
Airfield	0	0	0	0	0	0	0	0	0	0	**0**	**0**

Even with considerably low frequencies, the Stellenbosch Hills wine route dominates in this category, with the highest occurrences for every manifestation, except for airfields, of which there were none on any SWR wine farm. The most frequently occurring miscellaneous feature is private venue hire found on at least one out of every three farms. This was expected owing to its high importance weight (3.92).

Conference centres have an equal importance weight, but only one in five wine farms reported having conference centres. Film locations occur on more farms than conference centres (one third of the SWR) despite a lower importance weight (3.25). Film locations further have the highest individual route frequency in this category, on 61 percent of the farms in the Stellenbosch Hills route.

Although helipads have an importance weight (2.83) lower than that for airfields (2.92), some 16 percent of the SWR wine farms have facilities for helicopters to land and take off as opposed to none with airfields. Amphitheatres and sports facilities occur only in the Stellenbosch Hills and Greater Simonsberg wine routes where they qualify as "unique" features. The individual wine route values and indices are summarised in Table 3.10.

Table 3.10: Calculated scores for the miscellaneous category per wine route in the SWR, 2002

WINE ROUTE	NUMBER OF FARMS	REAL VALUE (*R*)	POSSIBLE VALUE (*P*)	AVERAGE INDEX (*A=R/P*)	*C&C* INDEX*
Stellenbosch Hills	18	38	126	30.2%	31.0%
Stellenboschberg	11	14	77	18.2%	19.9%
Helderberg	25	22	175	12.6%	13.9%
Bottelary Hills	14	11	98	11.2%	13.2%
Greater Simonsberg	24	19	168	11.3%	12.2%
Stellenbosch Wine Region	92	104	644	16.1%	17.4%

* $C\&C = \left(\frac{\sum cfw}{WR(cmw)} \right) 100$

The regional prominence of the Stellenbosch Hills route is once again confirmed in the route's highest average and C&C indices, which are both over 13 percent higher than the SWR averages. Stellenboschberg is the only other route to exceed the SWR averages, but only marginally. The remaining routes are all fairly close in terms of low average and C&C indices.

The Greater Simonsberg route has the lowest C&C index and the Bottelary Hills route has the lowest average index. This difference in route indices is small, but is explained by the influence of importance weights, whereby the Bottelary Hills route's indicators are fewer in number than the Greater Simonsberg route (lower real value and hence lower average index),

these indicators are considered more important, according to the focus group weighting, hence Greater Simonsberg has the higher C&C value.

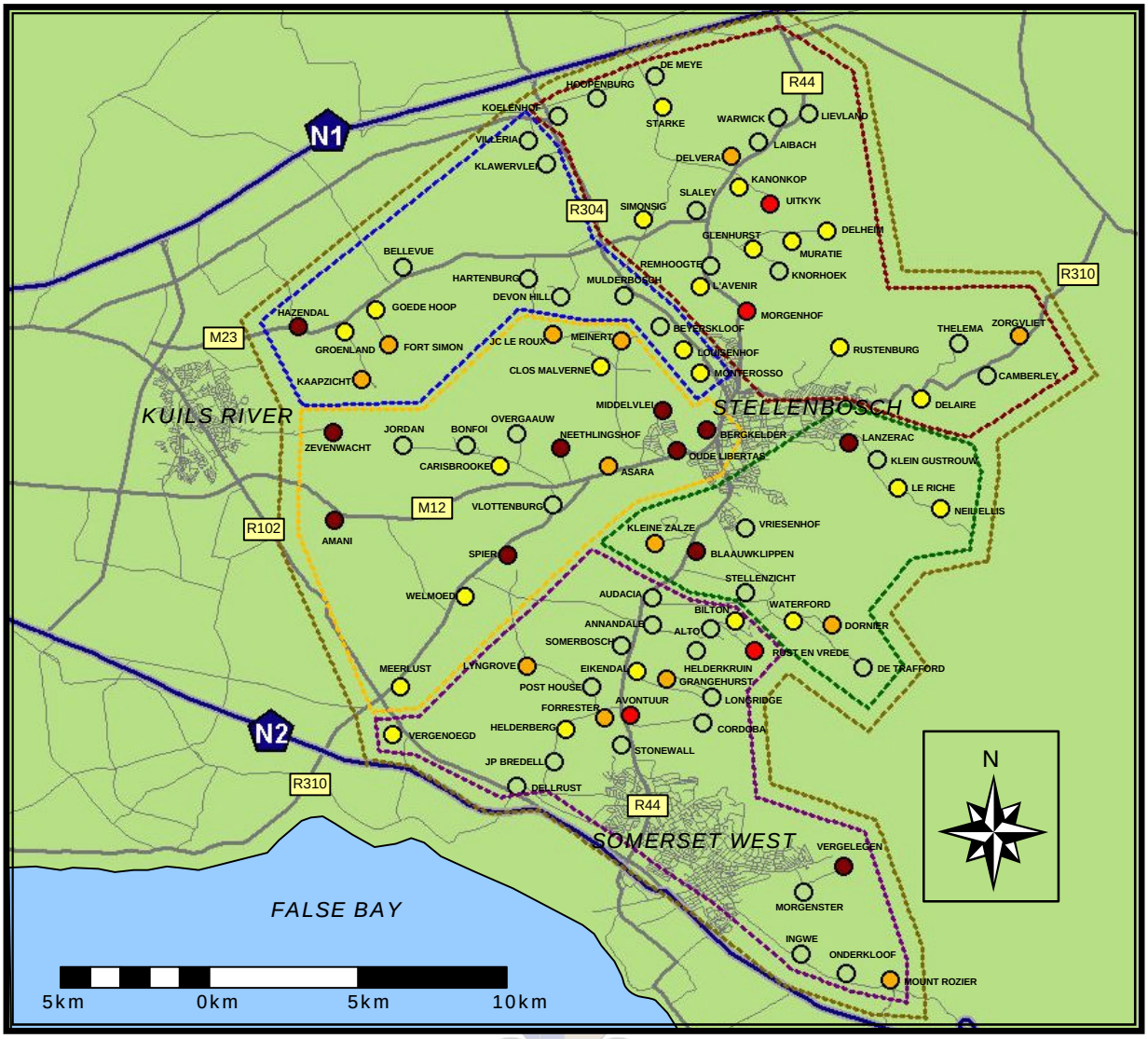
It is clear from Table 3.10 that the Stellenbosch Hills route has both the highest concentration of miscellaneous manifestations relative to route size (highest average value) and the greatest degree of commercialisation and commodification per route (highest C&C value) based on miscellaneous indicators. This premier position is clear in Figure 3.4 where Stellenbosch Hills is shown to have the most farms (7 out of 11) with high Fc&c levels.

3.4.2 Analysis of the miscellaneous category

The inherently mixed nature of this category would seem to indicate its lesser importance or impact in contradiction to the focus group's assessment of the miscellaneous category in overall fourth place (see Table 2.7). Conference facilities and venue hire are the two indicators with the highest weights (3.92), but venue hire occurs on more farms. It must be remembered though that conference centres are separate and substantial capital investments and enterprises, while venue hire usually involves hiring out the existing visitor or farm facilities.

Film locations also imply a form of hiring out of the farm facilities, which could explain the similar occurrence to venue hire in SWR. The film industry in the Western Cape has identified wine farms as sought-after locations (Reddy, 2001), as emphasised by one out of three farms in the SWR making their premises available for filming.

The miscellaneous manifestations may not strictly be attractions for wine tourists, but as exemplified by film locations, conference facilities and venue hire, serve more as direct indicators of commercialisation on wine farms. This clearly does not exclude them from having an impact on tourism, for by providing these types of services, they meet a need in the recreation market and increase interaction with farm guests (Nickerson, Black & McCool, 2001). By adding these miscellaneous facilities and services to wine farms, the wine tourism product is expanded and visitor interest and attraction is consequently enhanced. The idea of enhancing attraction is elaborated on in the discussion of heritage manifestations.



COMMERCIALISATION AND COMMODIFICATION LEVELS	
	NO MISCELLANEOUS
	1% - 24%: LOW
	25% - 37%: AVERAGE
	38% - 49%: MODERATE
	50% - 100%: HIGH

NATIONAL ROADS
MAIN ROADS
FARM ACCESS ROADS
URBAN AREAS
ATLANTIC OCEAN
STELLENBOSCH WINE REGION
BOTTELARY HILLS
GREATER SIMONSBERG
HELDERBERG
STELLENBOSCH HILLS
STELLENBOSCH-BERG

THE COLOUR-CODED SYMBOL PLOTTED AT A FARM LOCATION INDICATES THE CLASS INTO WHICH THE FARM'S DEGREE OF COMMERCIALISATION AND COMMODIFICATION FOR MISCELLANEOUS MANIFESTATIONS FALLS

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Figure 3.4: Wine farm levels of commercialisation and commodification (***Fc&c***) for the miscellaneous category in the SWR, 2002

3.5 THE MATURE VINTAGES: HERITAGE

This category includes historical and cultural elements on wine farms associated with the historical development of the wine industry and the farms themselves.

3.5.1 Overview of heritage

The heritage category has the least number of manifestations and indicators, along with the accommodation category, namely five. Table 3.11 shows the low occurrence of these few heritage indicators.

Table 3.11: Occurrence of heritage indicators per wine route in the SWR, 2002

	BOTTELARY HILLS		GREATER SIMONSBERG		HELDERBERG		STELLEN-BOSCH HILLS		STELLEN-BOSCHBERG		SWR	
INDICATOR	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**
Historical building(s)	3	21	6	25	8	32	8	44	4	36	**29**	**32**
Monument(s)	2	14	4	17	3	12	5	28	2	18	**16**	**17**
Museum / Historical display	1	7	4	17	3	12	4	22	1	9	**13**	**14**
Art gallery	1	7	1	4	3	12	1	6	1	9	**7**	**8**
Antique sales	0	0	0	0	1	4	1	6	0	0	**2**	**2**

Considering that the heritage category has an average importance weight of 3.00, the frequency of occurrences in Table 3.11 are lower than expected. Historical buildings with the highest importance weight (3.42) occur on one out of three farms. Museums and historical displays have a weight (3.25) slightly less than historical buildings, but an occurrence (14%) more than twice as small. Monuments take a surprising second place, while having the lowest importance weight in this category (2.50). The art gallery indicator also occurred less than its importance weight of 3.17 suggests, while antique sales hardly feature in the SWR.

The limited occurrence of heritage manifestations and indicators is evident in Table 3.12 where all the routes, except Stellenbosch Hills, have fewer actual heritage occurrences than the number of farms per route, i.e. the real value (R) is less than the number of farms.

Table 3.12: Calculated scores for the heritage category per wine route in the SWR, 2002

WINE ROUTE	NUMBER OF FARMS	REAL VALUE (*R*)	POSSIBLE VALUE (*P*)	AVERAGE INDEX (*A=R/P*)	*C&C* INDEX*
Stellenbosch Hills	18	19	90	21.1%	21.7%
Stellenboschberg	11	8	55	14.5%	15.2%
Helderberg	25	18	125	14.4%	15.1%
Greater Simonsberg	24	15	120	12.5%	13.0%
Bottelary Hills	14	7	70	10.0%	10.3%
Stellenbosch Wine Region	92	67	460	14.6%	15.1%

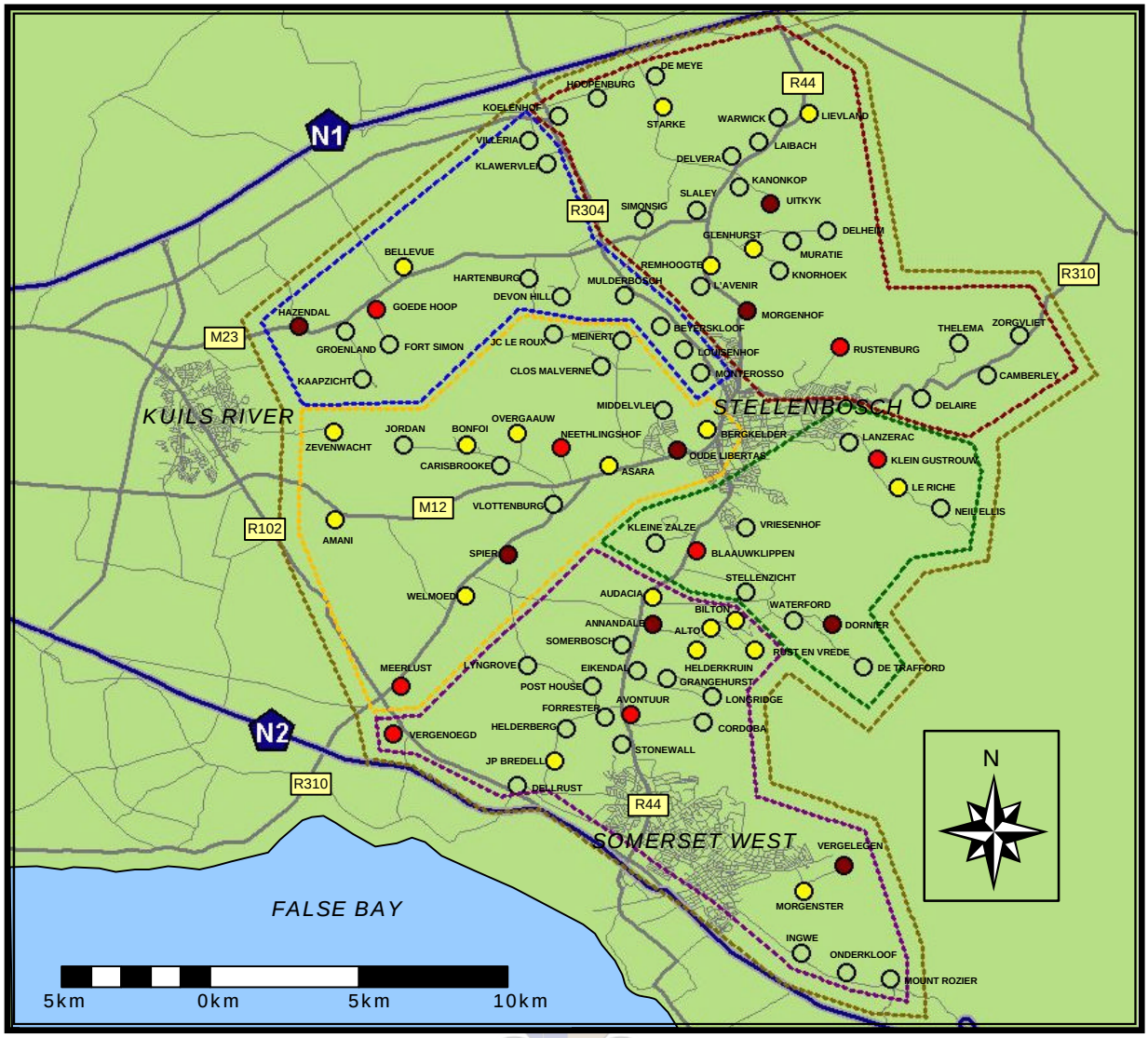
* $C\&C = \left(\frac{\sum cfw}{WR(cmw)} \right) 100$

Again, the Stellenbosch Hills route stands out here as the only one with both average and C&C indices greater than the SWR figures, indicating the highest concentration of manifestations relative to route size and the highest level of commercialisation and commodification per route in the heritage category. The remaining routes are all within close proximity of each other with the Bottelary Hills route having the lowest average and C&C values.

In Figure 3.5 all of the wine routes have at least one farm in both the high and moderate Fc&c classes. Stellenbosch Hills' dominance in Table 3.12 is supported by the route having two out of 18 farms in the high Fc&c levels, which equates to the greatest proportion (11%) of farms per route. However, it is the lack of heritage indicators that stands out in Figure 3.5, with Stellenbosch Hills having the least farms with no heritage manifestations, namely seven out of 18 (39%). In the other wine routes, more than half the farms have no heritage manifestations with Stellenboschberg having seven out of 11 (64%), Helderberg having 14 out of 25 (56%) and Greater Simonsberg having 17 out of 24 (71%). Table 3.12's lowest ranked route, Bottelary Hills has the greatest proportion (79%) of farms with no heritage indicators with 11 out of 14.

3.5.2 Analysis of heritage

As mentioned earlier (Section 1.1), a foundation of the multifaceted definition of wine tourism is cultural tourism where aspects of heritage are made available and marketed to visitors (Department of Environmental Affairs and Tourism, 1996). Wine tourism is further defined as being about heritage in the full sense of the word, from the culture of the wine product to the traditional practises that surround its consumption (Hall, 1996).



COMMERCIALISATION AND COMMODIFICATION LEVELS	
	NO HERITAGE
	1% - 24%: LOW
	25% - 37%: AVERAGE
	38% - 49%: MODERATE
	50% - 100%: HIGH

NATIONAL ROADS
MAIN ROADS
FARM ACCESS ROADS
URBAN AREAS
ATLANTIC OCEAN
STELLENBOSCH WINE REGION
BOTTELARY HILLS
GREATER SIMONSBERG
HELDERBERG
STELLENBOSCH HILLS
STELLENBOSCH-BERG

THE COLOUR-CODED SYMBOL PLOTTED AT A FARM LOCATION INDICATES THE CLASS INTO WHICH THE FARM'S DEGREE OF COMMERCIALISATION AND COMMODIFICATION (*Fc&c*) FOR HERITAGE FALLS

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Figure 3.5: Wine farm levels of commercialisation and commodification (***Fc&c***) for the heritage category in the SWR, 2002

The SWR's wine industry heritage is traced back to the region's development starting around Stellenbosch in the latter quarter of the 17th century. This explains why every farm with a high Fc&c class in Figure 3.5 has the "older" manifestations in the form of historical buildings and monuments, most specifically farmsteads with Cape Dutch architecture.

The many years that encompass the history and development of the SWR make heritage an inescapable element of the local wine tourism appeal and interest (Rudeman, 1991). Given winemaking's local history of more than three centuries, it would seem appropriate that the study area "show it off" (Bruwer, 2003: 429). However, this is not reflected in the general occurrence of the heritage manifestations. But it must be remembered that the SWR has seen the greatest increase in the number of new wine farms in all the wine regions in the Western Cape (Vandecandelaere, 2002) and new wine farms do not necessarily have authentic historical buildings or monuments.

Despite the low occurrence rates and the differences in importance weights, the heritage category's importance to wine tourism is found in wine regions being expressions of regional culture and identity, and both the wine and tourism industries rely on these elements of regional branding for market leverage and promotion (Fuller, 1997). Heritage manifestations contribute not only to the entire region, but also to the individuality of a wine farm, thereby expanding the wine tourism product and broadening each farm's individual attractiveness to tourists.

Apart from increasing farm individuality and appeal, heritage fulfils a further social and educational function. South Africa has an infamous history of social and political injustices and the wine industry shares this history with a number of sensitive issues, especially regarding race and gender. Heritage manifestations, particularly those that have the highest importance weights, namely historical buildings (3.42) and museums and historical displays (3.25) and the manner in which they document, explain and enlighten tourists to the customs, cultures, traditions and lifestyle experiences of a wine farm and the people on it, is of cardinal importance. Such a sharing of history leads to an understanding of the past and lays a firm foundation for future strategies that are essential to promote racial and gender empowerment in both the wine and tourism industries (Vink & Karaan, 2000).

Wine tourism, as a whole, benefits from an appreciation or knowledge of heritage and an historical understanding particularly in a South African context. South Africa can now offer tourists four types of wine: red, white, rosé as well as a new "politically correct bottle of black" (*Economist*, 2002, 60) in the form of wines produced by previously disadvantaged farm workers as on Helderkruin (Wines of South Africa, 2003). However, there remain low occurrences of heritage manifestations in the SWR, limiting the contribution this category can make in terms of historical and cultural appreciation, and more importantly, in terms of commercialisation and commodification. This limited occurrence and contribution is also identified in other categories, including outdoor activities.

3.6 BEYOND THE BOTTLE: OUTDOOR ACTIVITIES

This category includes both specialised and general farm operations and attractions that take place outside the actual wine cellar or winery. It involves other elements of the farm that are not necessarily directly related to wine, and are probably more closely related to eco-tourism or farm tourism.

3.6.1 Overview of outdoor activities

The outdoor category comprises a diverse collection of manifestations and indicators encompassing a wide range of possible farm activities, all of which were found to have low frequencies in the SWR (see Table 3.13).

Table 3.13: Occurrence of outdoor activity indicators per wine route in the SWR, 2002

	BOTTELARY HILLS		GREATER SIMONSBERG		HELDERBERG		STELLEN-BOSCH HILLS		STELLEN-BOSCHBERG		SWR	
INDICATOR	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**
Bird-watching	2	14	4	17	2	8	3	17	0	0	**11**	**12**
Farm animal viewing / Feeding	2	14	4	17	1	4	3	17	1	9	**11**	**12**
Hiking	1	7	3	13	2	8	1	6	1	9	**8**	**9**
Wild game / Nature reserve	0	0	2	8	0	0	3	17	0	0	**5**	**5**
Horse-riding	1	7	1	4	0	0	2	11	0	0	**4**	**4**
Stud farming	0	0	1	4	1	4	1	6	0	0	**3**	**3**
Fishing	0	0	0	0	1	4	1	6	1	9	**3**	**3**
4x4 trail(s)	1	7	0	0	0	0	1	6	0	0	**2**	**2**
Mountain bike trail(s)	0	0	0	0	0	0	1	6	0	0	**1**	**1**

Bird watching, with an importance weight of 2.92, shares the highest occurrence rate of 12 percent with farm animal viewing and/or feeding, which has the highest importance weight (3.33). Although having equal occurrences these two manifestations differ in nature as farm animal viewing/feeding signifies a definite and pronounced effort to commodify a farm activity while the rural nature of wine farms automatically implies probable bird populations that can be viewed. Hiking trails occur on nine percent of the farms in the SWR, while the remaining outdoor category indicators all have occurrences of five percent or less.

The wild game/nature reserve manifestation is limited to only one out of 20 farms, which was expectedly low as the study focuses on wine farms where land is expensive, scarce and generally dedicated to vineyards. The equestrian animal indicators, namely stud farming and horse riding, were expected to go hand in hand even though their importance weights differ by 0.83. However, only Spier (2002) offers both, as stud farming in the SWR involves thoroughbred race horses not suitable for riding by tourists, while such tourist rides require the provision of separate, more docile horses. The fishing, 4x4 trail and mountain bike trail indicators have very low frequencies in line with their below average importance weights.

Table 3.14 further shows the low occurrence frequencies, all the wine routes having fewer actual outdoor manifestations and indicators than farms per route, i.e. the real value (R) is lower than the number of farms.

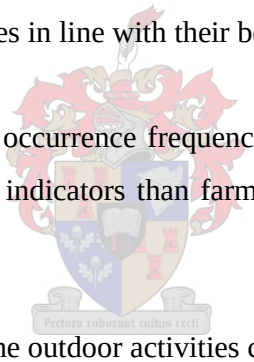


Table 3.14: Calculated scores for the outdoor activities category per wine route in the SWR, 2002

WINE ROUTE	NUMBER OF FARMS	REAL VALUE (*R*)	POSSIBLE VALUE (*P*)	AVERAGE INDEX (*A=R/P*)	*C&C* INDEX*
Stellenbosch Hills	18	16	162	9.9%	10.1%
Greater Simonsberg	24	15	216	6.9%	7.3%
Bottelary Hills	14	7	126	5.6%	5.9%
Stellenboschberg	11	3	99	3.0%	3.2%
Helderberg	25	7	225	3.1%	3.1%
Stellenbosch Wine Region	92	48	828	5.8%	6.0%

* $C\&C = \left(\frac{\sum cfw}{WR(cmw)} \right) 100$

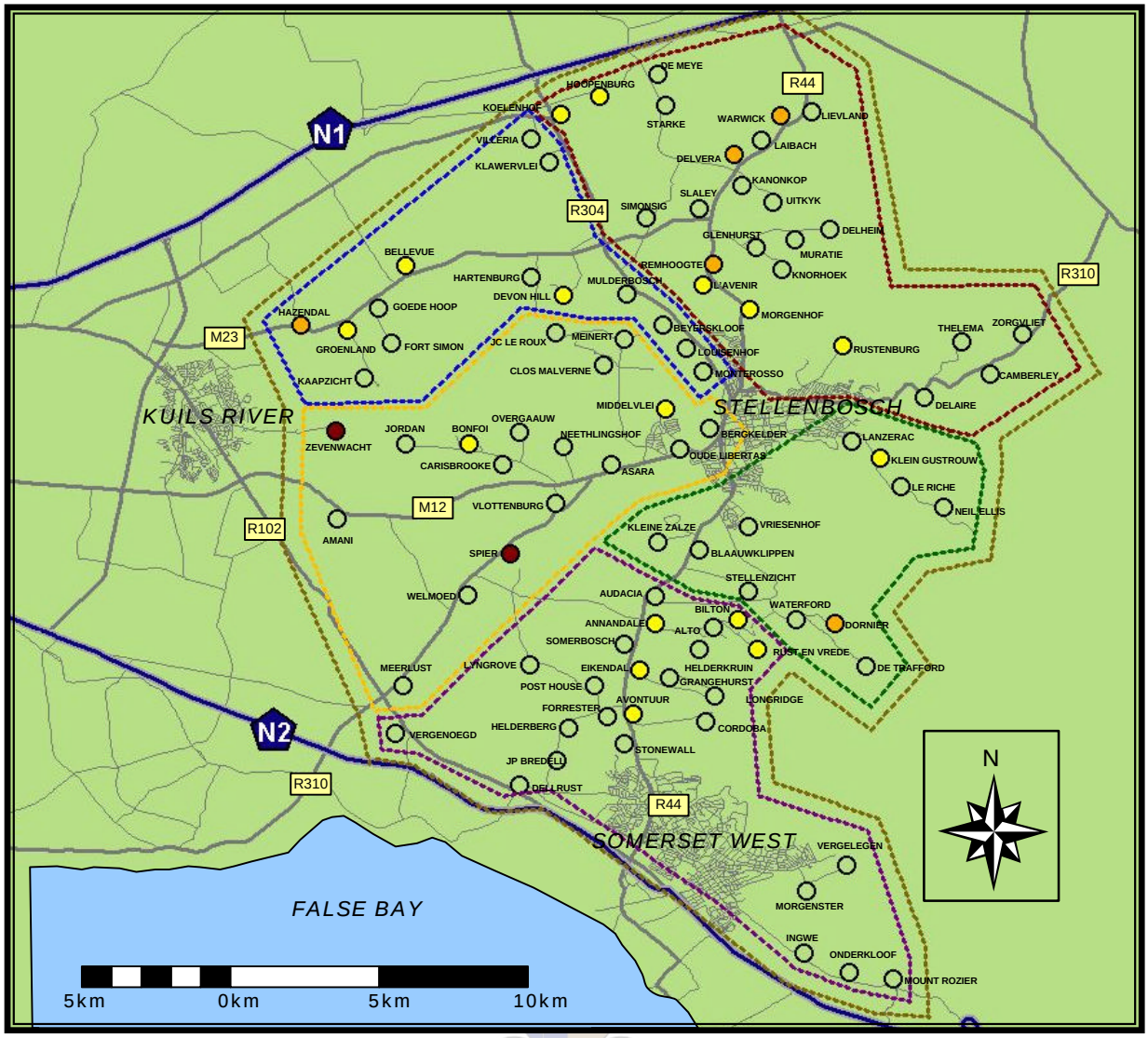
The outdoor activity category has the lowest SWR C&C index of all the categories (0.6% lower than Accommodation). This not only demonstrates a low indicator occurrence but, more importantly, the least contribution to the degree of commercialisation and commodification of wine farms. The highest real, average and C&C scores again characterise the Stellenbosch Hills wine route. Although having only one more occurrence than the Greater Simonsberg route, Stellenbosch Hills has farms on which higher importance weight manifestations occur. The latter route has the category's highest relative concentration of manifestations and the highest level of commercialisation and commodification. The Greater Simonsberg wine route is the only other route with scores above the SWR averages in the outdoor category, with Bottelary Hills' scores only just below the averages.

Figure 3.6 supports Stellenbosch Hills' highest values and indices with the route being the only one having any farms in the high Fc&c class (Zevenwacht and Spier). The small contribution that outdoor activities makes to the degree of commercialisation and commodification is also illustrated by three out of four farms in the SWR having no outdoor manifestations or indicators.

3.6.2 Analysis of outdoor activities

The outdoor category tends toward the agritourism aspect of wine tourism's definition, namely where the natural resources, environment and location of the farm are used to stabilise farm income as well as contribute towards broadening the experiences of visiting tourists (Nowers, De Villiers & Myburgh, 2000). The importance of this broadened tourist experience is that a broad mix of interests and activities can catch a greater proportion of the tourism market (Demhardt, 2003).

Outdoor manifestations develop this idea of a balanced tourism product by providing attractions orientated toward the family, such as horse-riding, nature reserves and animal viewing or feeding through which the public is educated, entertained, amused and ultimately satisfied as a whole (Yale, 1998). The inherent "outdoor" nature of the manifestations in this category serves not only as its definition but also as an asset, for outdoor activities have become a way of life, particularly in South Africa. Tourists have become more health conscious and activity orientated and the healthy, family and often fashionable associations linked to outdoor manifestations such as hiking trails and off-road 4x4 driving, present yet another lure enticing the public to visit a wine farm (Speirs, 2003).



COMMERCIALISATION AND COMMODIFICATION LEVELS	
	NO ACTIVITIES
	1% - 24%: LOW
	25% - 37%: AVERAGE
	38% - 49%: MODERATE
	50% - 100%: HIGH

NATIONAL ROADS
MAIN ROADS
FARM ACCESS ROADS
URBAN AREAS
ATLANTIC OCEAN
STELLENBOSCH WINE REGION
BOTTELARY HILLS
GREATER SIMONSBERG
HELDERBERG
STELLENBOSCH HILLS
STELLENBOSCH-BERG

THE COLOUR-CODED SYMBOL PLOTTED AT A FARM LOCATION INDICATES THE CLASS INTO WHICH THE FARM'S DEGREE OF COMMERCIALISATION AND COMMODIFICATION (*Fc&c*) OF OUTDOOR ACTIVITIES FALLS

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Figure 3.6: Wine farm levels of commercialisation and commodification (***Fc&c***) based on outdoor activities in the SWR, 2002

All agritourism involved farms inherently have environments and operations that attract visitors, so it would seem logical to fully use what they have (Nickerson, Black & McCool, 2001). However, these outdoor manifestations are essentially opportunistic and cannot be developed simply by commercial selection, which contributes to why the occurrence values of the outdoor category and it's impact on commercialisation and commodification in the SWR remains particularly low. On the other hand, eating facilities on wine farms are developed by commercial selection and are discussed in the following section.

3.7 SAVOURING THE FLAVOUR: EATING FACILITIES

This category of indicators includes facilities provided on wine farms, where food and beverages can be purchased and/or served and places where the said items can be consumed.

3.7.1 Overview of eating facilities

Getz (2000) states that eating facilities are an essential visitor service for a wine tourism destination, however the low occurrence values in Table 3.15 do not necessarily support this claim in the SWR.

Table 3.15: Eating facilities per wine route in the SWR, 2002

	BOTTELARY HILLS		GREATER SIMONSBERG		HELDERBERG		STELLEN-BOSCH HILLS		STELLEN-BOSCHBERG		SWR	
INDICATOR	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**
Pre-booked meals	6	43	12	50	6	24	6	33	4	36	**34**	**37**
Restaurant	2	14	5	21	5	20	6	33	4	36	**22**	**24**
Private picnicking	2	14	7	29	4	16	6	33	2	18	**21**	**23**
Prepared picnics	2	14	5	21	3	12	5	28	2	18	**17**	**18**
Coffee shop / Tea room	1	7	2	8	4	16	3	17	3	27	**13**	**14**
Packed lunches	0	0	2	8	2	8	1	6	1	9	**6**	**7**
Vending machine	0	0	0	0	0	0	2	11	1	9	**3**	**3**

The importance weights for this category (see Table 2.6) favour the larger, more developed manifestations, with restaurants and coffee shops or tearooms topping the ranking, most noticeably with restaurants having the third highest importance weight in the whole list of indicators. However, the pre-booked meals indicator has the highest occurrence in the SWR (more than one out of every three farms), followed by restaurants on about a quarter of the SWR farms. The popularity of pre-booked meals can be explained by the cost efficiency of

the manifestation, as the farms do not run the risk of surplus or loss as they only prepare meals that are ordered in advance. Packed lunches are related to pre-booked meals in the sense that they are prepared by the wine farm but the low occurrence (7%) is also attributable to cost efficiency, as packed lunches are prepared in speculative quantities, not according to prior arrangement, and so run greater risks.

Restaurants occur on ten percent more farms than coffee shops/tearooms but interestingly they tend to occur together as only two of the coffee shop/tearoom manifestations are on wine farms having no restaurants. Coffee shops/tearooms are apparently regarded as a second or complementary option to restaurants. Picnicking in both the own and provided forms have higher occurrences than coffee shops/tearooms despite both forms having importance weights below the category average of 2.88.

Private picnicking (23%) occurs on more wine farms than prepared picnics do (18%), probably because the wine farms need only provide areas for picnicking rather than providing the food as well. Although the simplest and most cost-effective method of providing snacks and beverages would appear to be vending machines, this indicator has a minimal occurrence. The absence of vending machines could be attributed to wine farms wanting to keep a sense of exclusivity and farm individuality.

Even with their relatively low occurrence rates, eating facilities scored considerably higher than the outdoor category, despite the former having a lower average importance weight. The average and C&C values indicated in Table 3.16 are also higher.

Table 3.16: Calculated scores for the eating facilities category per wine route in the SWR, 2002

WINE ROUTE	NUMBER OF FARMS	REAL VALUE (*R*)	POSSIBLE VALUE (*P*)	AVERAGE INDEX (*A=R/P*)	*C&C* INDEX*
Stellenbosch Hills	18	29	126	23.0%	24.7%
Stellenboschberg	11	17	77	22.1%	24.4%
Greater Simonsberg	24	33	168	19.6%	20.5%
Helderberg	25	24	175	13.7%	15.0%
Bottelary Hills	14	13	98	13.3%	14.1%
Stellenbosch Wine Region	92	116	644	18.0%	19.3%

* $C\&C = \left(\frac{\sum cfw}{WR(cmw)} \right) 100$

The Stellenbosch Hills route has both the highest average (indicating the highest concentration of eating facilities relative to route size) and C&C (highest level of commercialisation and commodification per wine route) indices in this category but the Stellenboschberg route is a close second. Only the Helderberg and Bottelary Hills routes are below the SWR average indices.

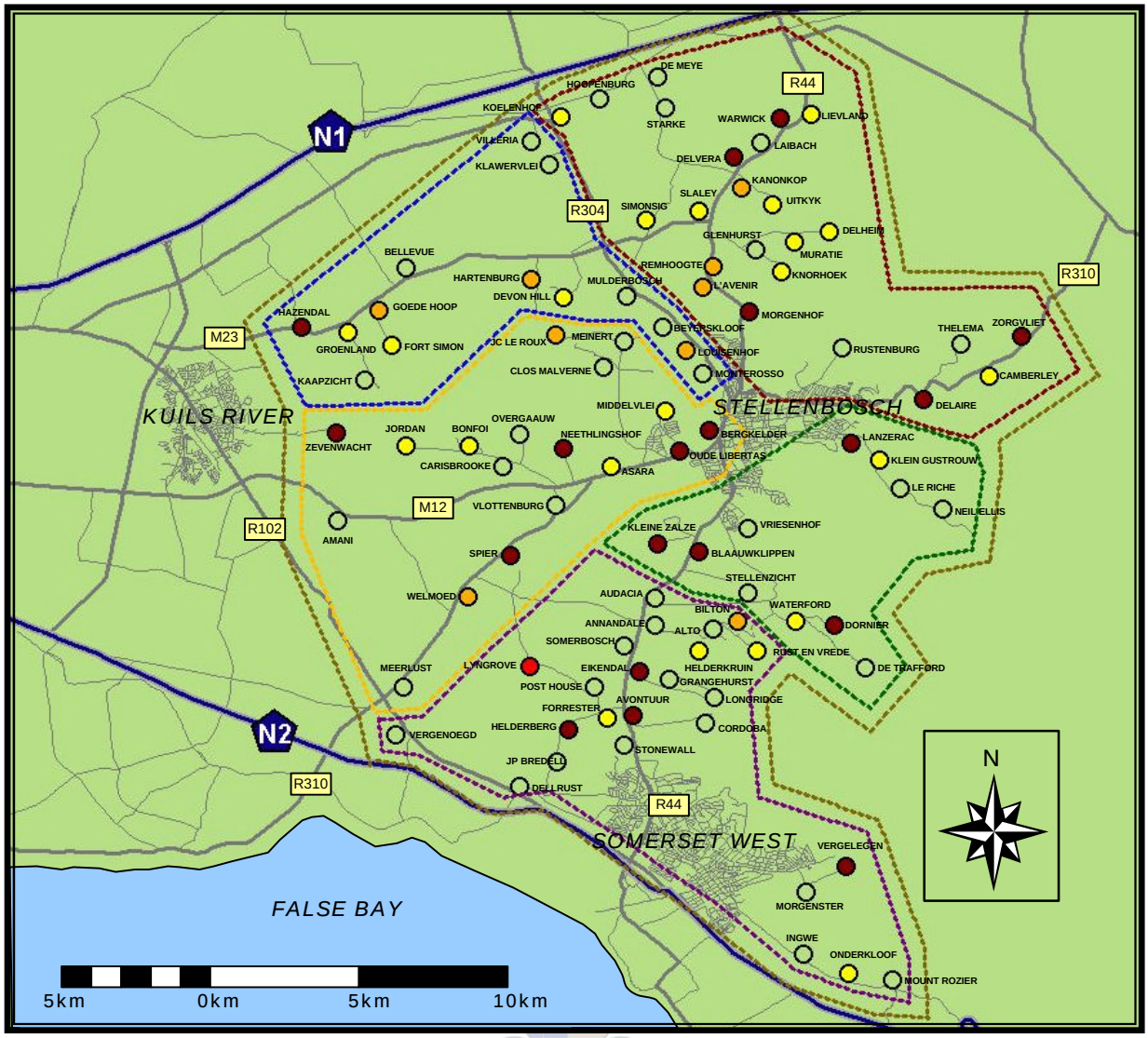
Figure 3.7 supports the closeness of the average and C&C indices of the wine routes above the SWR averages. Stellenbosch Hills and Greater Simonsberg routes have the same number of farms (5) with high Fc&c levels, as do the Helderberg and Stellenboschberg routes (4), but it is Stellenboschberg (36%) and Stellenbosch Hills (28%) that have the largest route proportions of high Fc&c index farms.

3.7.2 Analysis of eating facilities

In the previously discussed categories which included capacity data (visitor facilities and wine sales), *all* the wine farms throughout the SWR had the constituent manifestations and indicators. This led to every farm having capacity data and each wine route having identical WRcap and Fcap values for visitor facilities and wine sales capacities. However, not all the wine farms have eating facility manifestations and therefore some farms have no eating facility capacity data.

The reason why the Fcap values in Table 3.17 are higher than the WRcap values is that the calculation only includes farms in a wine route that have eating facility manifestations, while the WRcap values are calculated by including all the farms in a wine route. The Fcap values are truer indicators of the average capacities of the eating facilities in the wine routes, however WRcap does indicate the general distribution of eating facilities in each route and throughout the SWR.

The top ranking in Table 3.16 of the Stellenbosch Hills wine route for this category is supported in Table 3.17 where the route is the only one with WRcap and Fcap values greater than the SWR averages. This indicates the presence of substantially larger eating facilities in this route, the most noteworthy of which is Spier (2002) that can cater for 430 patrons. The remaining routes all have capacity values substantially lower than Stellenbosch Hills with only the Stellenboschberg wine route equalling the SWR eating facility Fcap average of 76.



COMMERCIALISATION AND COMMODIFICATION LEVELS	
	NO FACILITIES
	1% - 24%: LOW
	25% - 37%: AVERAGE
	38% - 49%: MODERATE
	50% - 100%: HIGH

NATIONAL ROADS
MAIN ROADS
FARM ACCESS ROADS
URBAN AREAS
ATLANTIC OCEAN
STELLENBOSCH WINE REGION
BOTTELARY HILLS
GREATER SIMONSBERG
HELDERBERG
STELLENBOSCH HILLS
STELLENBOSCH-BERG

THE COLOUR-CODED SYMBOL PLOTTED AT A FARM LOCATION INDICATES THE CLASS INTO WHICH THE FARM'S DEGREE OF COMMERCIALISATION AND COMMODIFICATION (*Fc&c*) OF EATING FACILITIES FALLS

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Figure 3.7: Wine farm levels of commercialisation and commodification (***Fc&c***) based on eating facilities in the SWR, 2002

Table 3.17: Visitor capacities of all eating facilities per wine route in the SWR, 2002

WINE ROUTE	NO. OF FARMS (TOTAL)	NO. OF FARMS (CAPACITY)	TOTAL CAPACITY (*Tcap*)	WINE ROUTE CAPACITY (*WRcap*)	FARM CAPACITY (*Fcap*)
Stellenbosch Hills	18	11	1550	86	141
Stellenboschberg	11	5	380	35	76
Helderberg	25	10	655	26	66
Bottelary Hills	14	7	420	30	60
Greater Simonsberg	24	17	778	32	46
Stellenbosch Wine Region	92	50	3783	41	76

In all the routes the Fcap capacity is much greater than the WRcap (see Table 3.17), indicating fewer farms but larger eating facility capacities. These high capacity manifestations are mainly restaurants that characteristically form part of the larger and expanded wine destination farms which have diverse attractions and developments. Consequently, the restaurants are labelled as *destination restaurants* which provide the farms with an attraction offering something unique to lure visitors and diners and adds to the wine experience in the form of the type of food and selection of wine, quality of service, location and ambience (Getz, 2000). The Lord Neethling restaurant at Neethlingshof (2002) on the Stellenbosch Hills route exemplifies this destination feature with its Cape Malay cuisine.

Although restaurants were given the greatest importance weight in the focus group assessment of eating facilities, experience elsewhere suggests that there are weaknesses in wine tourism that undermine their value (see Table 2.6). The Victoria Wineries Tourism Council (1997) in Australia, for example, describes these weaknesses as the problems of high capital outlays, poor integration between wineries, local food producers and restaurants, and insufficient cooperation and networking between individuals and groups involved in food, wine and tourism.

These problems and weaknesses were confirmed to exist in the SWR through an interview with Hermann Feichtenschlager (2002, pers com), owner of the Klawervlei wine farm on the Bottelary Hills wine route. He stated that many of the local wine farms would establish restaurants, or the like, were it not for excessive “red tape” and “high costs”. He explained that the problems of gaining permission and the rights to build and operate a restaurant are

such administrative hassles that many wine farm owners, himself included, have "given up trying". He also outlined a further problem by commenting on the lack of a quality "food culture" to supplement wine tourism in the study area. Good authentic food is recognised as "a prerequisite for any wine orientated holiday [for] where vines flourish, McDonald's seldom does" (Simon, 2001: 132).

Nevertheless this wine-food relationship is not entirely ignored in the SWR as shown by the many smaller scale and alternative eating facilities. Examples include picnicking, pre-booked lunches and special functions such as an organised meal with the wine-maker (Remhoogte, 2002) and Stellenbosch University student's annual "Leaver's Luncheon" (Waterford, 2002) which complement the wine experience and add to a farm's individual attraction. The retail category also provides manifestations and indicators that complement the wine experience and is discussed in the following section.

3.8 THE WINE RACK: RETAIL

This category involves the selling on the farm of products and merchandise other than wine. The commodities offered for sale may or may not have been produced on the farm.

3.8.1 Overview of retailing

Only two of the seven retail indicators occur with frequencies of any note, i.e. branded merchandise sales and gift/souvenir shops (see Table 3.18).

Table 3.18: Occurrence of retailing indicators per wine route in the SWR, 2002

	BOTTELARY HILLS		GREATER SIMONSBERG		HELDERBERG		STELLEN-BOSCH HILLS		STELLEN-BOSCHBERG		SWR	
INDICATOR	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**
Branded merchandise	5	36	13	54	6	24	12	67	4	36	**40**	**43**
Gift / Souvenir shop	1	7	6	25	3	12	5	28	3	27	**18**	**20**
Fruit / Vegetable sales	0	0	4	17	2	8	0	0	1	9	**7**	**8**
Plant Nursery	0	0	1	4	2	8	0	0	1	9	**4**	**4**
Cheesery	0	0	1	4	0	0	1	6	1	9	**3**	**3**
Craft market	0	0	1	4	0	0	1	6	0	0	**2**	**2**
Pottery	0	0	2	8	0	0	0	0	0	0	**2**	**2**

Both of these top occurring indicators are related to wine, either in the nature of the product (e.g. corkscrews and glasses) or in branding (e.g. farm labelled shirts). It was therefore expected that they should have the highest frequencies, given that their importance ratings are the highest in the category, namely 3.50 and 3.42 respectively (see Table 2.6). The other retail manifestations are enterprises that are separate from or independent of wine, although some may complement wine, such as Spier's (2002) craft market where wine racks are offered. These manifestations have minimal occurrences on the wine farms in the SWR thereby contributing to the low scores in Table 3.19.

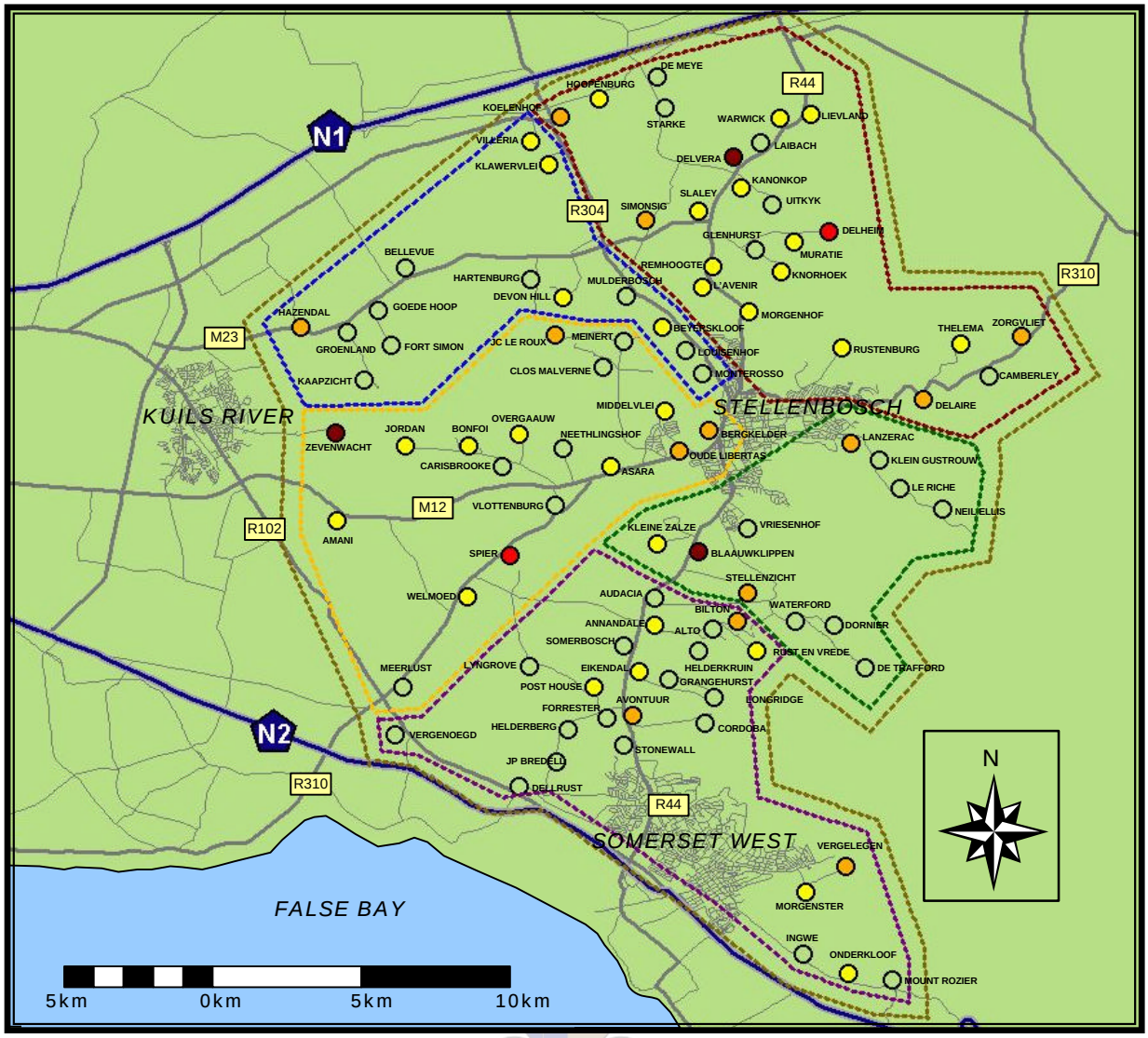
Table 3.19: Calculated scores for the retail category per wine route in the SWR, 2002

WINE ROUTE	NUMBER OF FARMS	REAL VALUE (*R*)	POSSIBLE VALUE (*P*)	AVERAGE INDEX (*A=R/P*)	*C&C* INDEX*
Greater Simonsberg	24	28	168	16.7%	18.5%
Stellenbosch Hills	18	19	126	15.1%	18.0%
Stellenboschberg	11	10	77	13.0%	14.4%
Helderberg	25	13	175	7.4%	8.0%
Bottelary Hills	14	6	98	6.1%	7.4%
Stellenbosch Wine Region	92	76	644	11.8%	13.4%

* $C\&C = \left(\frac{\sum cfw}{WR(cmw)} \right) 100$

The Greater Simonsberg wine route has the highest average and C&C indices, giving the route the greatest concentration of retail manifestations relative to the number of farms and the highest level of retail commercialisation and commodification per wine route. However, Stellenbosch Hills has a C&C index only half a percent lower than Greater Simonsberg. The low average and C&C indices found in the Helderberg and Bottelary Hills routes (over 5% lower than the SWR indices) are indicated not only in the lack of manifestations (R) but also in that nearly two out of every three farms in these routes have no retailing (see Figure 3.8).

Indeed almost half the wine farms (48%) in the SWR have no retail manifestations and only the Greater Simonsberg, Stellenbosch Hills and Stellenboschberg routes have a farm in the high Fc&c class. Greater Simonsberg and Stellenboschberg routes also each have a farm with a moderate Fc&c level, but the former route's top ranking in Table 3.19 is due to it having proportionately fewer farms (25%) with no retailing.



COMMERCIALISATION AND COMMODIFICATION LEVELS

	NO RETAILING
	1% - 24%: LOW
	25% - 37%: AVERAGE
	38% - 49%: MODERATE
	50% - 100%: HIGH

NATIONAL ROADS
MAIN ROADS
FARM ACCESS ROADS
URBAN AREAS
ATLANTIC OCEAN
STELLENBOSCH WINE REGION
BOTTELARY HILLS
GREATER SIMONSBERG
HELDERBERG
STELLENBOSCH HILLS
STELLENBOSCH-BERG

THE COLOUR-CODED SYMBOL PLOTTED AT A FARM LOCATION INDICATES THE CLASS INTO WHICH THE FARM'S DEGREE OF COMMERCIALISATION AND COMMODIFICATION (*Fc&c*) OF RETAILING FALLS

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Figure 3.8: Wine farm levels of commercialisation and commodification (***Fc&c***) for retailing in the SWR, 2002

3.8.2 Analysis of retailing

Although some of the manifestations in the retail category are not directly related to wine or the wine industry, such activities provide another point of contact on the wine farm for the market forces of production and consumption to interact, they add another attraction, and they generate an alternative income (Boniface, 2003). They represent an important part of the sales and marketing mix in the total wine tourism product that farms must try to balance and deliver at a profit (Cambourne, Macionis, Hall & Sharples, 2000).

Retail manifestations such as potteries, craft markets, plant nurseries, fruit and vegetable sales, and cheeseries are not common in the SWR, but they do offer expanded farm appeal to tourists or visitors who are not normally inclined toward wine tourism *per se*, or the environment in which it occurs. Particularly, they contribute to the attractiveness of the larger wine destinations, as confirmed in the SWR where all of these retail manifestations occur on the destination farms Blaauklippen (2002), DelVera (2003) and Zevenwacht (2002).

The branded merchandise and gift/souvenir shop manifestations are not limited to wine destinations though. This is apparent in their higher frequencies in the SWR (see Table 3.18). The products sold in these outlets are not just utility items such as bottle-openers, or just objects of general tourist appeal, such as clothing, but more importantly, the products are a form of advertising and help to expose and develop the reputation of a wine farm and encourage brand loyalty. In the context of customer and brand loyalty, the retailing of gifts and merchandise takes on further importance as sources of income. Surveys have shown that repeat or loyal customers to wine farms spend 72 percent more money on souvenirs per visit than first-time farm visitors (De Kock, 2003).

In general, apart from branded merchandise and gift/souvenir shops, the retail indicators have limited frequencies and indices. Almost half the farms in the SWR have no retailing and a quarter if them have low Fc&c levels, limiting the contribution and impact that retailing makes on commercialisation and commodification in the study area. The penultimate category of manifestations and indicators on wine farms is that of accommodation facilities and is discussed in the following section.

3.9 A NIGHTCAP: ACCOMMODATION

This category involves the provision of various accommodation facilities on wine farms for tourists or visitors to stay over for indefinite periods.

3.9.1 Overview of accommodation

The accommodation category not only has the least manifestations (along with heritage), but also has the second least occurrences in the SWR (see Table 3.20) and the second lowest average importance weight (2.77) after the "other" category (see Table 2.7).

Table 3.20: Occurrence of accommodation indicators per wine route in the SWR, 2002

	BOTTELARY HILLS		GREATER SIMONSBERG		HELDERBERG		STELLEN-BOSCH HILLS		STELLEN-BOSCHBERG		SWR	
INDICATOR	NO.	%	NO.	%	NO.	%	NO.	%	NO.	%	NO.	%
Guesthouse / Bed & breakfast	0	0	5	21	5	20	1	6	2	18	**13**	**14**
Rooms for rent	2	14	1	4	3	12	0	0	0	0	**6**	**7**
Cabins / Bungalows	1	7	2	8	0	0	1	6	1	9	**4**	**4**
Hotel	0	0	0	0	0	0	2	11	1	9	**3**	**3**
Camping / Caravan park	0	0	0	0	0	0	0	0	0	0	**0**	**0**

The guesthouse/B&B indicator has both the highest importance weight (3.50) and occurrence frequency (14%), and accounts for as much occurrence of accommodation in the SWR as all the other manifestations combined. The absence of camping or caravan facilities on the wine farms in the SWR confirms the lowest importance rating (1.83) of all manifestations (see Table 2.6). Accommodation's minimal occurrence on the wine routes of the SWR is borne out in the low real, average and C&C values in Table 3.21.

The Helderberg and Greater Simonsberg routes have the most actual cases (R) of accommodation in Table 3.21. However, with fewer farms, Stellenboschberg has the highest average and C&C indices indicating both the highest concentration of accommodation facilities relative to wine route size and the highest level of commercialisation and commodification per wine route in the accommodation category. The Bottelary Hills route, with the least accommodation manifestations has the lowest average and C&C indices.

Table 3.21: Calculated scores for the accommodation category per wine route in the SWR, 2002

WINE ROUTE	NUMBER OF FARMS	REAL VALUE (*R*)	POSSIBLE VALUE (*P*)	AVERAGE INDEX (*A=R/P*)	*C&C* INDEX*
Stellenboschberg	11	4	55	7.3%	8.8%
Greater Simonsberg	24	8	120	6.7%	7.8%
Helderberg	25	8	125	6.4%	6.9%
Stellenbosch Hills	18	4	90	4.4%	5.2%
Bottelary Hills	14	3	70	4.3%	3.9%
Stellenbosch Wine Region	92	26	460	5.7%	6.6%

* $C\&C = \left(\frac{\sum cfw}{WR(cmw)} \right) 100$

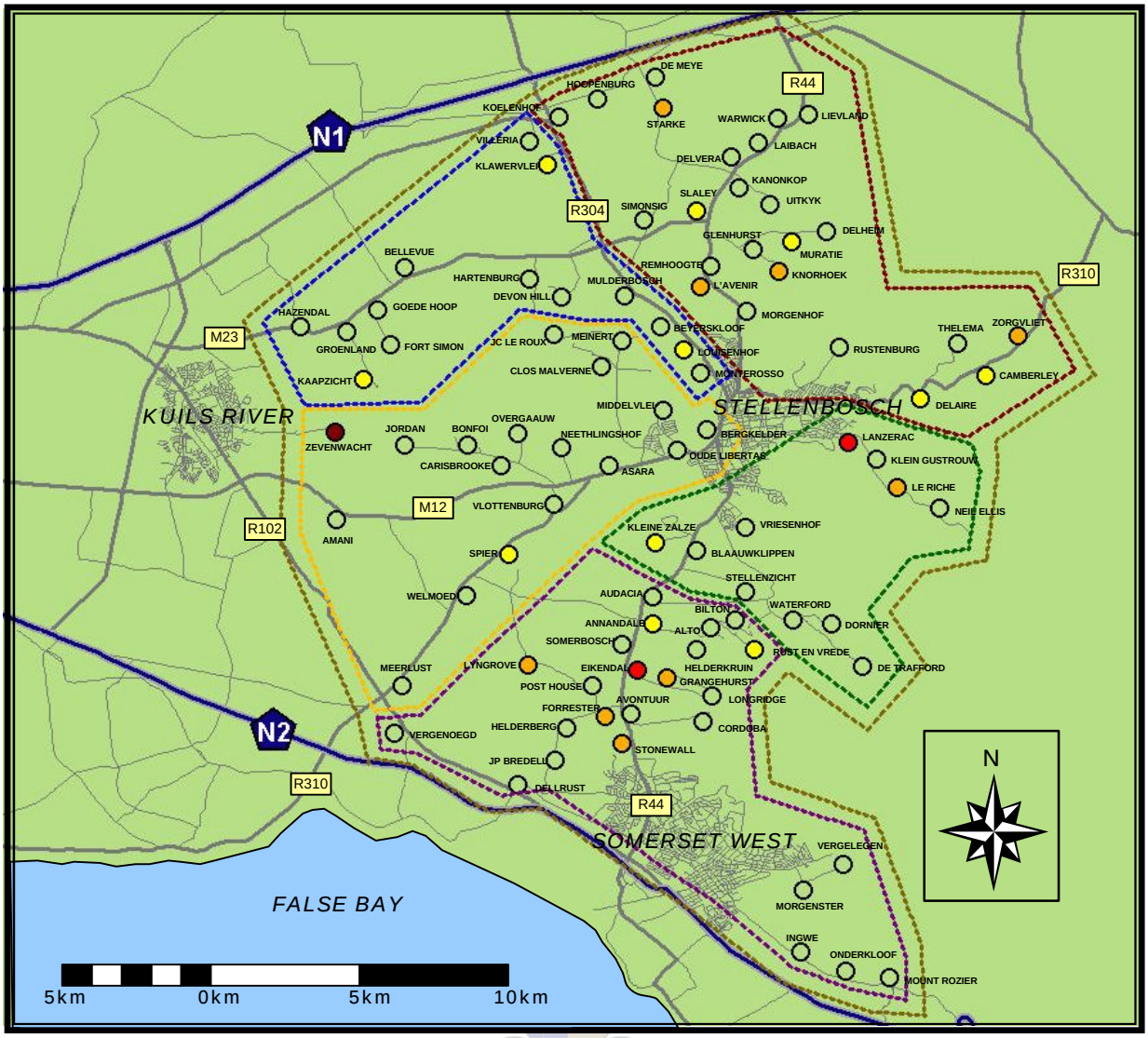
Table 3.21's low values and indices are illustrated in Figure 3.9 where the majority (72%) of the farms in the SWR have no accommodation facilities. Stellenboschberg's top C&C ranking in Table 3.21 is not obvious in Figure 3.9 but, proportionately, the route has the least farms (9%) with low Fc&c levels. Only Stellenbosch Hills has a farm in the high Fc&c class, however proportionately the route also has the most farms with no accommodation (89%), namely 16 out of 18.

3.9.2 Analysis of accommodation

The limited occurrence of accommodation facilities on the wine farms in the SWR is unexpected, as it is claimed in the literature to be an "essential service" for wine farms involved in wine tourism (Getz, 1998: 26). The presence of accommodation facilities is elucidated further by considering the capacity of the accommodation on offer in the study area (see Table 3.22).

Table 3.22: Visitor capacities of all accommodation facilities per wine route in the SWR, 2002

WINE ROUTE	NO. OF FARMS (TOTAL)	NO. OF FARMS (CAPACITY)	TOTAL CAPACITY (*Tcap*)	WINE ROUTE CAPACITY (*WRcap*)	FARM CAPACITY (*Fcap*)
Stellenbosch Hills	18	2	355	20	178
Stellenboschberg	11	3	142	13	47
Greater Simonsberg	24	8	76	3	10
Helderberg	25	7	57	2	8
Bottelary Hills	14	3	15	1	5
Stellenbosch Wine Region	92	23	645	7	28



COMMERCIALISATION AND COMMODIFICATION LEVELS	
	NO ACCOMMODATION
	1% - 24%: LOW
	25% - 37%: AVERAGE
	38% - 49%: MODERATE
	50% - 100%: HIGH

NATIONAL ROADS
MAIN ROADS
FARM ACCESS ROADS
URBAN AREAS
ATLANTIC OCEAN
STELLENBOSCH WINE REGION
BOTTELARY HILLS
GREATER SIMONSBERG
HELDERBERG
STELLENBOSCH HILLS
STELLENBOSCH-BERG

THE COLOUR-CODED SYMBOL PLOTTED AT A FARM LOCATION INDICATES THE CLASS INTO WHICH THE FARM'S DEGREE OF COMMERCIALISATION AND COMMODIFICATION (*Fc&c*) FOR ACCOMMODATION FALLS

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Figure 3.9: Wine farm levels of commercialisation and commodification (***Fc&c***) according to accommodation facilities in the SWR, 2002

The impact of a few farms which provide accommodation for considerable numbers of guests is demonstrated by the capacity data. The Stellenbosch Hills and Stellenboschberg wine routes are the only routes that exceed both the SWR averages in Table 3.22. The Stellenbosch Hills route has the greatest total capacity, where the accommodation is provided by just two large wine destination farms, namely Spier (2002) with accommodation for 300 guests and Zevenwacht (2002) with accommodation for 55 guests. The Stellenboschberg route has the second highest total capacity, with three wine farms in this route offering accommodation, the major contributor being Lanzerac (2002) with facilities for 128 guests.

It is noticeable that Spier has the greatest accommodation capacity, yet it is in the low Fc&c class (see Figure 3.9) while Zevenwacht with a capacity of 55 scores at the high Fc&c level. The reason is that Fc&c levels are calculated on the number of manifestations in a category, not their size. So although Spier has almost six times the capcity, it has only one manifestation (a large hotel) and Zevenwacht has three manifestations (hotel, guesthouse and bungalows).

The high accommodation capacity wine farms all provide accommodation in the form of hotels, and although they can house the most visitors, it must be remembered that guesthouses/B&Bs are the most common form of accommodation in the SWR (see Table 3.20). This type also has the highest importance weight (see Table 2.6). Guesthouses/B&Bs, being smaller capacity forms of accommodation, are more affordable for wine farm owners to establish and run. Farms also often offer accommodation as more than just a moneymaking incentive: “The agenda may be to show to the outsider, usually an urban dweller, the ways and priorities of the farmer and generate an appreciation of their perspective” (Boniface, 2003: 44).

These results show that the supply of tourist accommodation on wine farms in the SWR is relatively limited. A separate survey confirmed that there is considerable competition from off-farm tourist accommodation, viz. there are 113 advertised accommodation facilities in the study area that are not located on the SWR farms. These include hotels, guesthouses, B&Bs and flats. Sixty-five (58%) of these are in the Somerset West area (Helderberg Tourism Bureau, 2003) and the remaining forty-eight (42%) are in and around Stellenbosch (Stellenbosch Tourism and Information Bureau, 2003).

This competition, the high costs of establishing and maintaining large accommodation facilities, and the constant concern about seasonality (as experienced in Europe with "50% of the accommodation capacity not being used each year" (Lickorish, 1991: 43)) all contribute to the low occurrence of accommodation facilities on the SWR's wine farms. The last category of commercialisation and commodification indicators and manifestations, namely the 'other' category, is set out next.

3.10 THE ODD BINS: OTHER

This category comprises the manifestations of commercialisation and commodification on wine farms named as applicable by respondents in an open category, namely 'other'.

3.10.1 Overview of the 'other' category

The respondent wine farms in the SWR provided only six additional indicators (see Table 3.23). The small number of indicators and their almost unique occurrence on only eight farms in the SWR has almost negligible impact on the results apart from their inclusion in calculating a specific wine farm's overall degree of commercialisation and commodification (C).

Table 3.23: Occurrence of 'other' indicators per wine route in the SWR, 2002

	BOTTELARY HILLS		GREATER SIMONSBERG		HELDERBERG		STELLEN-BOSCH HILLS		STELLEN-BOSCHBERG		SWR	
INDICATOR	NO.	%	NO.	%	NO.	%	NO.	%	NO.	%	NO.	%
Olive products	1	7	2	8	1	4	0	0	0	0	**4**	**4**
Jewellery design and sales	1	7	0	0	0	0	1	6	0	0	**2**	**2**
Bali clothing boutique	0	0	0	0	1	4	0	0	0	0	**1**	**1**
Horse-drawn carriage rides	0	0	0	0	0	0	0	0	1	9	**1**	**1**
Weaving	0	0	0	0	0	0	1	6	0	0	**1**	**1**
Outdoor sculptures	0	0	0	0	0	0	0	0	1	9	**1**	**1**

The 'other' indicators' very limited occurrence (only 10 manifestations in the SWR) is also apparent in the summary of values and indices (see Table 3.24) where very low average and C&C indices are registered.

Table 3.24: Calculated scores for the 'other' category per wine route in the SWR, 2002

WINE ROUTE	NUMBER OF FARMS	REAL VALUE (*R*)	POSSIBLE VALUE (*P*)	AVERAGE INDEX (*A=R/P*)	*C&C* INDEX*
Stellenboschberg	11	2	66	3.0%	3.1%
Bottelary Hills	14	2	84	2.4%	2.7%
Greater Simonsberg	24	2	144	1.4%	1.9%
Stellenbosch Hills	18	2	108	1.9%	1.7%
Helderberg	25	2	150	1.3%	1.4%
Stellenbosch Wine Region	92	10	552	1.8%	2.0%

* $C\&C = \left(\frac{\sum cfw}{WR(cmw)} \right) 100$

The negligible nature of these indicators makes mapping their Fc&c levels irrelevant as conclusive results or explanations cannot be drawn. However, their presence in the SWR is sufficient to warrant further discussion.

3.10.2 Analysis of the 'other' category

All these indicators, with the exception of horse-drawn carriage rides that would conveniently fall into the outdoor category, are home industries or enterprises that actually belong in the retail category. Olive products has the highest frequency, supported by its highest importance weight of 3.33 (see Table 2.6). The remaining indicators, with the exception of jewellery design and sales (2%), all share the lowest occurrence of 1%, having isolated occurrences in the SWR.

Despite having the lowest average importance weight of all the categories, the other category does provide some manifestations of commercialisation that fill a need or niche in the recreation market, or offer a service that increases visitor interest and interaction by adding another attraction to a wine farm. This chapter's discussion of the indicators and manifestations of commercialisation and commodifcation on wine farms in the SWR is concluded by the following summary section.

3.11 THE BOTTLE AT A GLANCE: SYNTHESIS OF RESULTS

The results presented in this chapter have been described according the ten categories of commercialisation and commodification in terms of their calculated occurrence frequencies,

indices, values and Fc&c levels per wine route (see Appendix C for complete Fc&c records) and as SWR totals and averages. The discussion of the categories was done in descending order according to decreasing average importance weights allocated in the focus group assessment (see Table 2.7) and, generally speaking, the category average importance weights were reflected in the occurrence levels (category average indicator index) as summarised in Table 3.24.

Table 3.24: Comparison of the ranks of average importance weights and average occurrence indices for the indicator categories

INDICATOR	AVERAGE IMPORTANCE WEIGHT	RANK	AVERAGE INDICATOR INDEX (A)	RANK
Visitor facilities	4.15	1	73.5%	1
Wine sales	3.78	2	60.4%	2
Education	3.44	3	20.8%	3
Miscellaneous	3.19	4	16.1%	5
Heritage	3.00	5	14.6%	6
Outdoor	2.94	6	5.8%	8
Eating facilities	2.88	7	18.0%	4
Retail	2.87	8	11.8%	7
Accommodation	2.77	9	5.7%	9
Other	2.50	10	1.8%	10
Stellenbosch Wine Region	**3.29**	**N/A**	**31.9%**	**N/A**

The comparison in Table 3.24 shows five ranks that correspond, three with higher importance weight rankings than average indices and two with lower importance weight rankings. The two top ranking categories in terms of average occurrence and importance, visitor facilities and wine sales, are the only two categories that exceed the SWR average of 32 percent, and considerably so. The other categories have relatively low occurrences, all below the SWR average, which substantiates the recognised importance in wine tourism, and the contribution to commercialisation and commodification of the visitor facilities and wine sales categories.

In terms of wine route importance and contribution, Table 3.25 summarises the wine route commercialisation and commodification index (C&C) for each route. These values are calculated in the same way as the category C&C indices, namely by dividing the sum of actual importance weights in a route by the maximum possible sum of importance weights in a route. The route C&C index indicates the average level of commercialisation and

commodification for all categories in each wine route and summarises the importance and contribution each route has made in terms of the data examined in this chapter.

Table 3.25: Wine route commercialisation and commodification (C&C) index for the SWR, 2002

RANK	WINE ROUTE	NUMBER OF FARMS	POSSIBLE WEIGHT (WR(cmw))	ACTUAL WEIGHT (Scfw)	ROUTE *C&C* INDEX*
1	Stellenbosch Hills	18	4527	1942	42.9%
2	Greater Simonsberg	24	6036	2303	38.2%
3	Stellenboschberg	11	2774	1036	37.3%
4	Helderberg	25	6286	2183	34.7%
5	Bottelary Hills	14	3523	1219	34.6%
	Stellenbosch Wine Region	**92**	**23147**	**8684**	**37.5%**

* $C\&C = \left(\frac{\sum cfw}{WR(cmw)} \right) 100$

The Stellenbosch Hills wine route has the highest route C&C index, over five percent higher than the SWR average. The only other route exceeding the SWR average is Greater Simonsberg, but by less than one percent. However, all of the wine routes below the SWR average are all very close. Stellenboschberg is less than one percent below average and Helderberg and Bottelary Hills are both less than three percent below the average. The ranking according to C&C index is confirmed in the average indices rankings shown in Table 3.26.

Table 3.26: Average (A) and C&C index ranks per wine route for indicator categories in the SWR, 2002

	VISITOR FAC.		WINE SALES		EDUCA-TION		MISCELL-ANEOUS		HERITAGE		OUTDOOR		EATING FAC.		RETAIL		ACCOM-MODATION		ROUTE AVERAGE RANK	
WINE ROUTE	A	C & C	A	C & C	A	C & C	A	C & C	A	C & C	A	C & C	A	C & C	A	C & C	A	C & C	A	C & C
Stellenbosch Hills	1	1	1	1	1	1	1	1	1	1	1	1	1	1	2	2	4	4	1.4	1.4
Greater Simonsberg	5	3	2	2	2	2	4	5	4	4	2	2	3	3	1	1	2	2	2.2	2.7
Stellenbosch-berg	3	5	3	3	3	3	2	2	2	2	4	4	2	2	3	3	1	1	2.6	2.8
Helderberg	4	4	4	4	4	4	3	3	3	3	5	5	4	4	4	4	3	3	3.8	3.8
Bottelary Hills	2	2	5	5	5	5	5	4	5	5	3	3	5	5	5	5	5	5	4.4	4.3

Stellenbosch Hills' highest route C&C index is confirmed by the highest route average ranking for both the average and C&C indices (see Table 3.26). The remaining routes are all consistent in their route average ranking for both of the indices. The description of commercialisation and commodification per wine route and the plotting of the levels at each farm location partly satisfies the third research objective of uncovering, describing and explaining the distribution of commercialisation and commodification.

Further examination is required to determine which factors influence the degree of commercialisation and commodification of the wine farms and to elaborate on the description of the distribution of commercialisation and commodification in the SWR.

4. SAVOURING THE TASTE: RESEARCH FINDINGS AND INTERPRETATIONS

This chapter presents, discusses and interprets the degree of commercialisation and commodification (C) on the Stellenbosch Wine Region's wine farms. The overview summarises the degrees of commercialisation and commodification according to the five classes of C values (see Table 2.11) and is followed by a description of manifestations typifying farms in these classes. The chapter concludes with an examination of the varying degrees of C in terms of six explanatory factors and a synthesis of the main findings and interpretations.

4.1 READING THE LABEL: OVERVIEW OF THE DEGREES OF COMMERCIALISATION AND COMMODIFICATION

The calculated degrees of commercialisation and commodification (C) for each surveyed wine farm in the five wine routes of the SWR are listed in Table 4.1, where farms are ranked in descending order of C. The table also lists, for each wine farm, the six explanatory variables that are employed in section 4.3 to explain the similarities and differences in the degrees and distributions of C in the SWR.

Table 4.1: Degree of commercialisation and commodification (C) with explanatory factors for each wine farm in the SWR, 2002

CLASS	RANK	STELLENBOSCH HILLS	C*	1.SAEWR MEMBER-SHIP**	2.WINE TOURISM EFFORT	3.WINE PRIMARY ATTRAC-TION	4.FARM SIZE (CAPA-CITY)	5.ACCESSIBILITY			6.TYPE OF OWNERSHIP
								NEXT TO MAIN ROAD	DISTANCE TO CAPE TOWN (km)	DISTANCE TO STELLEN-BOSCH (km)	
HIGH	1	Spier	77%	√	√	x	800	√	40.5	8.5	Company
	2	Zevenwacht	70%	√	√	√	300	X	33	28	Family
	3	Oude Libertas	65%	√	√	√	200	√	48	1.5	Company
	4	Bergkelder	56%	√	√	√	100	√	49.5	1	Company
	5	Neethlingshof	56%	√	√	√	350	√	45.5	6	Company
MODERATE	6	JC le Roux	45%	√	√	√	100	X	56	9.5	Company
	7	Middelvlei	44%	√	√	√	40	X	50	3.5	Family
	8	Welmoed	44%	√	√	√	50	√	38.5	11.5	Company
	9	Asara	41%	√	√	√	30	√	45.5	4	Overseas

Table 4.1 continued overleaf

Table 4.1 continued

AVERAGE	10	Jordan	36%	√	√	√	40	x	51	11.5	Family
	11	Amani	35%	X	√	√	15	√	33.5	15	Single
	12	Clos Malverne	34%	√	√	√	20	x	53	6.5	Single
	13	Meerlust	34%	X	√	√	12	√	35	15	Single
	14	Bonfoi	33%	√	√	√	20	x	49	9.5	Family
	15	Overgaauw	32%	√	√	√	20	x	49	9.5	Family
	16	Meinert	32%	√	x	√	100	x	54	7.5	Single
	17	Vlottenburg	28%	√	x	√	20	√	43	6	Company
	18	Carisbrooke	26%	X	x	√	8	x	48	8.5	Single
		AVERAGE C	**42%**								

CLASS	RANK	GREATER SIMONSBERG	C*	1.SAEWR MEMBER-SHIP**	2.WINE TOURISM EFFORT	3.WINE PRIMARY ATTRAC-TION	4.FARM SIZE (CAPA-CITY)	5.ACCESSIBILITY			6.TYPE OF OWNERSHIP
								NEXT TO MAIN ROAD	DISTANCE TO CAPE TOWN (km)	DISTANCE TO STELLEN-BOSCH (km)	
HIGH	1	Delvera	60%	X	√	√	600	√	48.5	12.5	Family
	2	Morgenhof	55%	X	√	√	300	√	56.5	5	Overseas
MODERATE	3	Warwick	48%	√	√	√	90	√	50	14	Family
	4	Delheim	48%	√	√	√	80	x	55.5	12.5	Family
	5	Zorgvliet	48%	√	√	√	85	√	67	11	Family
	6	Uitkyk	46%	√	√	√	40	x	50	13.5	Company
	7	L'Avenir	41%	√	√	√	40	√	54	6.5	Overseas
	8	Simonsig	41%	√	√	√	60	x	49.5	11	Family
	9	Delaire	41%	√	√	√	80	√	63	7	Overseas
	10	Knorhoek	40%	√	√	√	150	x	54.5	10	Family
	11	Kanonkop	40%	√	√	√	70	√	48.5	12	Family
	12	Rustenburg	39%	x	√	√	60	x	61	5	Single
AVERAGE	13	Glenhurst	36%	x	√	√	30	x	53.5	9.5	Single
	14	Koelenhof	36%	√	x	√	75	√	41.5	14	Company
	15	Camberley	34%	√	√	√	20	√	65.5	9.5	Single
	16	Remhoogte	34%	√	√	√	30	√	53	7.5	Single
	17	Laibach	33%	√	x	√	15	√	49.5	13.5	Single
	18	Muratie	32%	√	√	√	25	x	54.5	11.5	Family
	19	Slaley	32%	x	√	√	18	√	51	9.5	Family
	20	Lievland	30%	√	√	√	15	√	50	15	Overseas
	21	Thelema	29%	x	x	√	20	x	65	9	Family
	22	Hoopenburg	29%	√	√	√	30	x	43	15.5	Single
	23	De Meye	28%	√	√	√	30	x	43	17	Family
LOW	24	Starke	16%	√	√	√	12	x	44.5	15.5	Single
		AVERAGE C	**38%**								

Table 4.1 continued overleaf

Table 4.1 continued

CLASS	RANK	STELLENBOSCHBERG	C*	1.SAEWR MEMBER-SHIP**	2.WINE TOURISM EFFORT	3.WINE PRIMARY ATTRAC-TION	4.FARM SIZE (CAPA-CITY)	5.ACCESSIBILITY			6.TYPE OF OWNERSHIP
								NEXT TO MAIN ROAD	DISTANCE TO CAPE TOWN (km)	DISTANCE TO STELLEN-BOSCH (km)	
HIGH	1	Blaauklippen	57%	√	√	√	140	√	60.5	5	Overseas
	2	Lanzerac	52%	√	√	√	330	√	59.5	4	Company
MODERATE	3	Dornier	49%	√	√	√	40	x	64.5	10	Overseas
	4	Kleine Zalze	49%	√	√	√	100	x	60.5	5	Company
	5	Waterford	41%	√	√	√	50	x	63.5	9	Single
AVERAGE	6	Stellenzicht	33%	√	x	√	15	x	63	8.5	Company
	7	Niel Ellis	32%	√	√	√	15	x	63.5	8	Single
	8	De Trafford	28%	√	√	√	20	x	66	11.5	Single
LOW	9	Le Riche	24%	√	√	√	6	x	62	6.5	Single
	10	Vriesenhof	23%	√	√	√	10	x	59.5	4	Family
	11	Klein Gustrouw	21%	X	x	√	40	x	60.5	5	Family
		AVERAGE C	**37%**								

CLASS	RANK	HELDERBERG	C*	1.SAEWR MEMBER-SHIP**	2.WINE TOURISM EFFORT	3.WINE PRIMARY ATTRAC-TION	4.FARM SIZE (CAPA-CITY)	5.ACCESSIBILITY			6.TYPE OF OWNERSHIP
								NEXT TO MAIN ROAD	DISTANCE TO CAPE TOWN (km)	DISTANCE TO STELLEN-BOSCH (km)	
HIGH	1	Vergelegen	55%	√	√	√	500	x	52.5	24.5	Company
MODERATE	2	Avontuur	48%	√	√	√	100	√	45.5	12	Overseas
	3	Eikendal	48%	√	√	√	100	√	47	10.5	Overseas
	4	Bilton	47%	√	√	√	40	x	52.5	11	Overseas
	5	Annandale	45%	√	√	√	30	√	49.5	9	Single
	6	Helderberg	45%	√	√	√	100	x	43	13.5	Company
	7	Rust en Vrede	43%	√	√	√	50	x	53.5	12	Family
AVERAGE	8	Helderkruin	37%	√	√	√	30	x	51.5	10	Single
	9	Alto	36%	√	√	√	50	x	51.5	10	Company
	10	Lyngrove	35%	x	√	x	40	x	49.5	17.5	Company
	11	Onderkloof	34%	√	√	√	40	x	54.5	26.5	Single
	12	Stonewall	34%	x	√	√	40	√	46.5	13	Single
	13	Forrester	32%	√	√	√	100	x	45	12	Single
	14	Vergenoegd	32%	√	√	√	15	√	35	17	Company
	15	Morgenster	31%	√	√	x	24	x	51	23	Overseas
	16	Somerbosch	31%	√	√	√	35	√	48	9.5	Single
	17	Longridge	28%	√	√	√	50	x	50	13.5	Company
	18	Audacia	28%	√	√	√	15	√	50.5	8	Single
	19	Ingwe	28%	x	x	√	40	x	52.5	24.5	Single
	20	Grangehurst	28%	x	x	√	10	x	48.5	12	Single
	21	Cordoba	27%	√	√	√	15	x	48.5	15	Single
	22	Dellrust	27%	√	√	√	30	√	39	17.5	Family

Table 4.1 continued overleaf

Table 4.1 continued

LOW	23	JP Bredell	24%	√	√	√	15	x	41	15.5	Family
	24	Mount Rozier	24%	√	√	√	30	√	56.5	28.5	Single
	25	Post House	18%	x	√	√	25	x	45.5	13.5	Single
		AVERAGE C	**35%**								

CLASS	RANK	BOTTELARY HILLS	C*	1.SAEWR MEMBER-SHIP**	2.WINE TOURISM EFFORT	3.WINE PRIMARY ATTRAC-TION	4.FARM SIZE (CAPA-CITY)	5.ACCESSIBILITY			6.TYPE OF OWNERSHIP
								NEXT TO MAIN ROAD	DISTANCE TO CAPE TOWN (km)	DISTANCE TO STELLEN-BOSCH (km)	
HIGH	1	Hazendal	59%	√	√	x	80	√	35.5	19.5	Overseas
MODERATE	2	Goede Hoop	42%	√	√	√	25	√	38	17	Family
AVERAGE	3	Monterosso	37%	√	√	√	50	√	53	2.5	Family
	4	Louisenhof	37%	√	√	√	40	√	52	3.5	Family
	5	Villiera	36%	√	√	√	70	√	43	14	Company
	6	Devon Hill	35%	√	√	√	10	x	49.5	11	Overseas
	7	Fort Simon	35%	√	√	√	40	x	39.5	18.5	Single
	8	Beyerskloof	34%	√	√	√	50	√	51	4.5	Single
	9	Groenland	33%	√	√	√	20	√	37	18	Family
	10	Kaapzicht	32%	√	√	√	20	x	38.5	19.5	Family
	11	Bellevue	31%	√	x	√	40	√	39.5	15.5	Family
	12	Hartenburg	29%	√	√	√	50	x	50	11.5	Family
LOW	13	Mulderbosch	22%	√	√	√	8	√	48.5	7	Company
	14	Klawervlei	22%	√	√	√	20	√	44	13	Single
		AVERAGE C	**35%**								

FARM AVERAGE C	38%
FARM MINIMUM C	16%
FARM MAXIMUM C	77%
FARM C RANGE	61%

$$* \; C = \left(\frac{fw}{(mw + other)} \right) 100$$

** SAEWR: Stellenbosch American Express Wine Routes

Stellenbosch Hills has the highest average degree of C (42%) for the five routes and is the only route with a higher average than the SWR average (38%). The Greater Simonsberg route has the second highest average C value equalling the SWR average of 38 percent with Stellenboschberg only slightly behind (37%). The Helderberg and Bottelary Hills routes share the lowest C average of 35 percent. Despite the considerable range of C values for wine farms (61%), all five wine route average C values are within four percent of the SWR average.

Table 4.1 summarises the calculated degrees of C for each individual wine farm in the SWR while Table 4.2 describes commercialisation and commodification in the SWR by summarising the degrees according to the four classes of commercialisation and commodification per wine route.

Table 4.2: Degree of commercialisation and commodification (C) per class in the wine routes of the SWR

	BOTTELARY HILLS			GREATER SIMONSBERG			HELDERBERG			STELLEN-BOSCH HILLS			STELLEN-BOSCHBERG			SWR	
CLASS OF C*	NO.	% OF ROUTE	% OF SWR	NO.	% OF ROUTE	% OF SWR	NO.	% OF ROUTE	% OF SWR	NO.	% OF ROUTE	% OF SWR	NO.	% OF ROUTE	% OF SWR	NO.	% OF SWR
HIGH (50%-100%)	1	7	1	2	8	2	1	4	1	**5**	**28**	**5**	2	18	2	11	12
MODERATE (38%-49%)	1	7	1	**10**	**42**	**11**	6	24	7	4	22	4	3	27	3	24	26
AVERAGE (25%-37%)	10	**71**	11	11	46	12	**15**	60	**16**	9	50	10	3	27	3	48	52
LOW (1%-24%)	2	14	2	1	4	1	**3**	12	**3**	**0**	0	0	**3**	**27**	**3**	9	10
TOTAL	14	100	15	24	100	26	25	100	27	18	100	20	11	100	12	92	100

$$*C = \left(\frac{fw}{(mw + other)} \right) 100$$

It was expected that the Stellenbosch Hills route would dominate the 'high' C class due to it having the highest C average in Table 4.1. This dominance is clear in Table 4.2, the route having both the greatest proportion of farms per route (highest route percentage) and greatest proportion of farms in the SWR (highest SWR percentage) in the 'high' C class. The route has five out of the 11 wine farms in the SWR (45%) in the 'high' C class. In the 'moderate' C class, the Greater Simonsberg wine route has both the highest route and SWR percentages with 10 out of the 24 farms (42%) in this class, hence supporting its second highest C average (38%) in Table 4.1.

Most farms in the SWR (49 out of 92 or 53%) are in the 'average' C class. Bottelary Hills has the highest route percentage (71%) in this class, but the Helderberg route has the highest SWR proportion (16%) with five more 'average' class farms than Bottelary Hills. The 'low' C class has the least number of farms (9) in the SWR. Stellenboschberg has the highest route percentage (27%) for 'low' C farms and the shares the highest SWR percentage (3%) with Helderberg as both routes have three farms in this class. Most noticeable is that the Stellenbosch Hills route has no farms in the 'low' C class, emphasising its highest

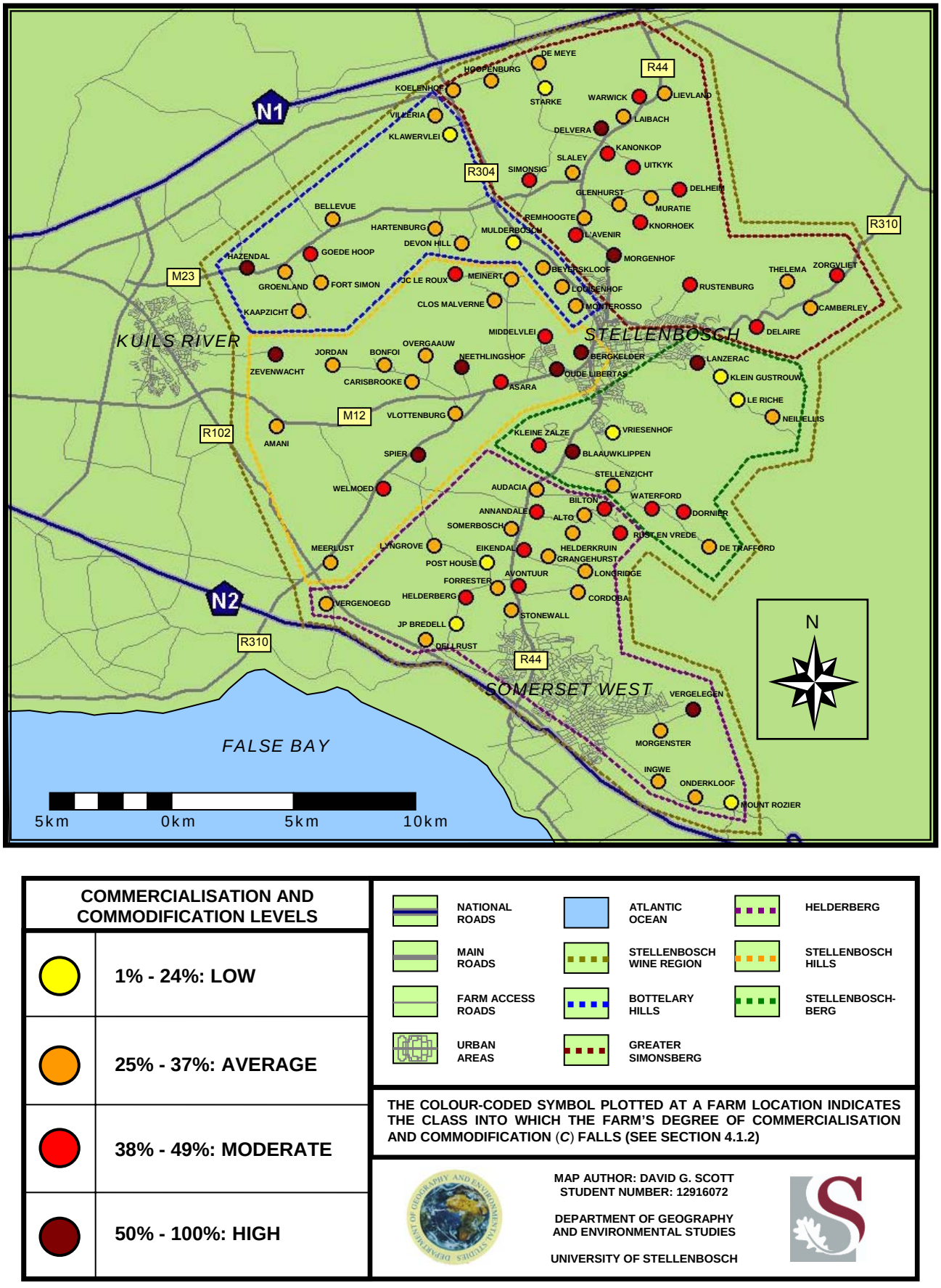
commercialisation and commodification route average in Table 4.1. The spatial distribution of degrees of commercialisation and commodification is shown in Figure 4.1.

The dominance of ‘average’ and ‘moderate’ farms in the SWR is overwhelmingly clear with the two classes constituting 72 out of the 92 farms (78%). The ‘high’ class farms are limited in their number and distribution, however, the concentration of these very commercialised farms is apparent in the Stellenbosch Hills route, along with the absence of ‘low’ class farms. Of the ‘high’ class wineries, it is noteworthy that only Bergkelder and Oude Libertas are immediate neighbours, indicating that these farms are generally widely spaced in the SWR. Figure 4.1 also shows the dominant size of the Helderberg and Greater Simonsberg routes in number of farms and area. The only other comparable route in terms of land area is Stellenbosch Hills, however the route has fewer farms explaining the apparently wider spacing of farms.

The smallest route in terms of both number of farms and area is Stellenboschberg. It must be remembered though that the route is divided into two parts by the Stellenbosch mountain range (not illustrated) accounting for the open area in the south-east corner of the route. Stellenboschberg also has the equal most ‘low’ C class farms (three) with Helderberg. However, the small area of Stellenboschberg increases the apparent visual concentration of these less commercialised farms, particularly as Klein Gustrouw and Le Riche are the only two ‘low’ class farms to be immediate neighbours in the SWR. Given the varying degrees of commercialisation and commodification (Table 4.1 and Figure 4.1) of the farms in the SWR it is necessary to tease out a generic picture/description of farms in each of the five classes.

4.2 WINES OF ORIGIN: MANIFESTATIONS AND INDICATORS CHARACTERISING THE CLASSES OF COMMERCIALISATION AND COMMODIFICATION

This section identifies a general farm profile for each class of commercialisation and commodification by describing the manifestations and indicators that typify and characterise wine farms in each class. It is helpful to refer back to Table 4.1 when reading the results given below.



COMMERCIALISATION AND COMMODIFICATION LEVELS	
	1% - 24%: LOW
	25% - 37%: AVERAGE
	38% - 49%: MODERATE
	50% - 100%: HIGH

NATIONAL ROADS
MAIN ROADS
FARM ACCESS ROADS
URBAN AREAS
ATLANTIC OCEAN
STELLENBOSCH WINE REGION
BOTTELARY HILLS
GREATER SIMONSBERG
HELDERBERG
STELLENBOSCH HILLS
STELLENBOSCH-BERG

THE COLOUR-CODED SYMBOL PLOTTED AT A FARM LOCATION INDICATES THE CLASS INTO WHICH THE FARM'S DEGREE OF COMMERCIALISATION AND COMMODIFICATION (*C*) FALLS (SEE SECTION 4.1.2)

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Figure 4.1: Overall degree of commercialisation and commodification (***C***) for each wine farm in the SWR, 2002

4.2.1 The ‘high’ class (C= 50%-100%)

This class constitutes 50 percent of the commercialisation and commodification scale but only accounts for 12 percent of the wineries in the SWR. These wineries with high degrees of C are all large, highly capitalized and well established wine destinations. The majority of the 11 cases are renowned wineries in South Africa, for example Spier, Zevenwacht, Hazendal, Blaauklippen, Neethlingshof, Lanzerac and Vergelegen.

They are identifiable by the large capacities of their visitor, eating, accommodation, wine tasting and wine sales facilities. The wide diversity in the wine tourism product offered to visitors is also characteristic of members of this class with the presence of less frequently occurring manifestations and indicators such as wine festivals, craft markets, farm animal viewing and feeding areas, helipads, conference centres, amphitheatres and hotels.

4.2.2 The ‘moderate’ class (C= 38%-49%)

This class covers only 11 percentage points on the C scale, but has more than double the number of the ‘high’ class, accounting for a quarter of all the wineries in the SWR. These farms are characterised by some miscellaneous manifestations such as private venue hire and film locations. Restaurants, tearooms and guesthouses typically occur on these farms. Among them are some long established names, e.g. Delheim, Uitkyk, Simonsig, Kanonkop and Helderberg, together with some more recent entrants, e.g. Warwick, Zorgvliet, Dornier, Waterford, Asara and Eikendal.

4.2.3 The ‘average’ class (C= 25%-37%)

The average class includes more than half the farms in the SWR ranging from some old traditional farms such as Muratie, Meerlust, Overgaauw and Alto to a host of new and lesser known names like Monterosso, Meinert, Lyngrove, Ingwe, De Meye, Slayley, Camberley, Cordoba, Clos Malverne and Carisbrooke. These farms characteristically provide visitor and wine sales facilities, brochures and pamphlets, specific sales areas, standing tasting areas, comfort areas, trained staff and are open on public holidays. Educational indicators in the form of cellar and vineyard tours as well as low-key retail manifestations like branded merchandise are also typical of these farms.

The fact of the greatest proportion of farms being in this class can be attributed to the basic necessity of providing attractive and appealing visitor facilities and wine sales and tasting services. The commodification and commercialisation manifestations characterising these farms are important regardless of whether the winery is very new and still developing its reputation, or is older and enjoying its established reputation.

4.2.4 The 'low' class (C= 1%-24%)

This class has the fewest farms in the SWR (9%). They are typically small-scale farms with boutique style wineries. These farms' characteristic manifestations are basic visitor facilities such as parking for cars, drinking water, toilets and wine tasting sales by appointment.

Having established the degrees of commercialisation and commodification for the wine farms in the SWR and the general farm profiles for each commercialisation and commodification class, the following section seeks to explain these findings.

4.3 SAMPLING THE WINE: EXPLANATIONS FOR THE STATES OF COMMERCIALISATION AND COMMODIFICATION

The explanation of the varying degrees of commercialisation and commodification on the wine farms in the SWR is done by examining six factors expected to influence the value of C. Information for four explanatory variables was elicited by the questionnaires while a fifth factor, farm accessibility, was generated by the researcher. The sixth variable, type of farm ownership, was obtained from De Kock (2004, pers com).

The six explanatory variables are:

- wine farm membership of the Stellenbosch American Express Wine Routes (SAEWR),
- efforts by wine farm to encourage wine tourism,
- primary attraction of wine farm,
- wine farm size,
- wine farm accessibility (three different measures), and
- wine farm ownership.

Each factor is discussed in turn in the following sections and once again it is advised that the individual wine farm information in Table 4.1 be considered in conjunction with the discussions below.

4.3.1 Official wine route membership

This factor represents one of the most fundamental differences in the respondent wine farms, as membership of an official wine route body represents a purposeful decision to adopt wine tourism as a farm business strategy. The official wine route organisation in the SWR is the SAEWR, established with the purpose of providing an umbrella body to generically market "Stellenbosch Wines of Origin" and its vineyards and wine products (Distell Newsroom, 2003).

Funds required to pursue this objective are generated by levies payable on grapes delivered and/or produced by members with the actual levy requirements depending on an assessed profile of a wine farm (Stellenbosch Wine Routes, 2001). The SWR includes wine farms that are affiliated to the SAEWR and farms that are not. The relationship between wine route membership and degree of C is expressed in Table 4.3.

Table 4.3: Wine route membership and the degree of commercialisation and commodification in the SWR, 2002

MEMBERSHIP	NUMBER OF FARMS	PERCENTAGE OF SWR	AVERAGE C VALUE
SAEWR MEMBER	77	84%	38%
NON-MEMBER	15	16%	34%
SWR	92	100%	38%

More than eight out of ten of the wine farms included in the study are members of the SAEWR and their average degree of commercialisation and commodification is slightly higher (4%) than that of non-member farms. It was expected that member wine farms would be more commercialised and commodified, as official membership of a wine route organisation indicates that a farm has an interest in encouraging wine tourism and receiving visitors. The difference in average degree, although small, seems to substantiate that wine route members have taken more steps to develop their farms as commercial wine tourism

attractions than non-members. But a more complex picture of the differences between members and non-members is exposed when wine route membership is crosstabulated with the four classes of commercialisation and commodification (see Table 4.4).

Table 4.4: Wine route membership by commercialisation and commodification class in the SWR, 2002

	SAEWR MEMBERSHIP					
	MEMBER		NON-MEMBER		ROW TOTALS	
CLASS OF C	NO.	%	NO.	%	NO.	%
HIGH (50%-100%)	9	12%	2	13%	**11**	**12%**
MODERATE (38%-49%)	23	30%	1	7%	**24**	**26%**
AVERAGE (25%-37%)	38	49%	10	67%	**48**	**52%**
LOW (1%-24%)	7	9%	2	13%	**9**	**10%**
COLUMN TOTALS	**77**	**84%**	**15**	**16%**	**92**	**100%**

In the ‘high’ class, non-member farms have a slightly greater proportion, however the ‘moderate’ class is clearly dominated by the member farms with a 23 percent greater proportion. Non-members are typically in the ‘average’ class with 67 percent in this class, 15 percent higher than the class “average” of 52 percent. In the ‘low’ class the tendency is also towards non-members with a proportion four percent higher than that of member farms. The impact of membership on the average degree of commercialisation and commodification in the SWR is less obvious when disaggregated by wine route as shown in Table 4.5.

Table 4.5: Wine route membership and the degree of commercialisation and commodification per wine route in the SWR, 2002

WINE ROUTE	NUMBER OF FARMS	MEMBERS (% OF WINE ROUTE)	NON-MEMBERS (% OF WINE ROUTE)	AVERAGE C VALUE
Bottelary Hills	14	100%	0%	35%
Stellenboschberg	11	91%	9%	37%
Stellenbosch Hills	18	83%	17%	42%
Helderberg	25	80%	20%	35%
Greater Simonsberg	24	75%	25%	38%
Stellenbosch Wine Region	92	84%	16%	38%

It emerges, for example, that the Bottelary Hills wine route has a full complement of member farms, but has the (equal) lowest average degree of commercialisation and commodification. And Greater Simonsberg has the greatest proportion of non-members *and* the second highest average C value. These findings suggest that the level of commercialisation and commodification on farms in the SWR is subject to more than just the decision to become official wine route members. The effect of conscious decisions is explored further in the next section.

4.3.2 Efforts to encourage wine tourism

This factor involves decisions by winery managements to make conscious effort(s) to encourage wine tourism. A minority of respondents (12%) stated that they did not make such efforts (see Table 4.6). It was expected that there would only be a small number of wine farms not encouraging wine tourism in some way because there are so many diverse activities and facilities that can be initiated to encourage wine tourism, as demonstrated by the 81 indicators listed in the questionnaire.

Table 4.6: Efforts to encourage wine tourism and the degree of commercialisation and commodification in the SWR, 2002

DECISION	NUMBER OF FARMS	PERCENTAGE OF SWR	AVERAGE C VALUE
MAKES EFFORT(S) TO ENCOURAGE WINE TOURISM	81	88%	39%
DOES NOT MAKE EFFORT(S) TO ENCOURAGE WINE TOURISM	11	12%	29%
SWR	92	100%	38%

The impact of efforts to encourage wine tourism on the degree of commercialisation and commodification is clearly greater than that of wine route membership when measured against average C values. Wine farms that do make efforts have an average degree of C 10 percent higher than those that do not. Table 4.7 crosstabulates efforts to encourage wine tourism with the classes of commercialisation and commodification.

Table 4.7: Efforts to encourage wine tourism by commercialisation and commodification class in the SWR, 2002

	EFFORTS TO ENCOURAGE WINE TOURISM					
	EFFORTS MADE		NO EFFORTS		ROW TOTALS	
CLASS OF C	NO.	%	NO.	%	NO.	%
HIGH (50%-100%)	11	14%	0	0%	**11**	**12%**
MODERATE (38%-49%)	24	30%	0	0%	**24**	**26%**
AVERAGE (25%-37%)	38	47%	10	91%	**48**	**52%**
LOW (1%-24%)	8	10%	1	9%	**9**	**10%**
COLUMN TOTALS	**81**	**88%**	**11**	**12%**	**92**	**100%**

Some percentages do not add up to 100% due to rounding.

The absence of farms making no efforts in both the high and moderate C classes illustrates the strong positive impact a decision to make efforts to encourage wine tourism has on the overall degree of commercialisation and commodification. Conversely, the very high proportion of no-effort farms with 'average' degrees of C underlines the negative impact of not making conscious efforts. When disaggregated by wine route, efforts to encourage wine tourism or not have a range of 20 percentage points between highest and lowest and the impact on average C values of making efforts is not conclusive (see Table 4.8).

Table 4.8: Efforts to encourage wine tourism and the degree of commercialisation and commodification per wine route in the SWR, 2002

WINE ROUTE	NUMBER OF FARMS	MAKE EFFORTS (% OF WINE ROUTE)	DO NOT MAKE EFFORTS (% OF WINE ROUTE)	AVERAGE C VALUE
Bottelary Hills	14	93%	7%	35%
Helderberg	25	92%	8%	35%
Stellenbosch Hills	18	89%	11%	42%
Greater Simonsberg	24	87%	13%	38%
Stellenboschberg	11	73%	27%	37%
Stellenbosch Wine Region	92	88%	12%	38%

The average C degree of commercialisation and commodification does not appear to be directly related to efforts to encourage wine tourism as exemplified by Bottelary Hills and Helderberg - the two routes sharing the lowest average C value - having the two highest proportions of farms that do make efforts. What is surprising is that five of the eleven no-

effort farms are members of the SAEWR. This is unexpected if one assumes that wine route membership is an obvious effort to encourage wine tourism. This is possibly attributable to differences in respondents' understanding of "wine tourism" and/or ambiguity regarding the terms "efforts" and "encouragement".

4.3.3 Primary farm attractions

The third factor studied is whether the respondent wineries consider wine to be their most important (or primary) tourist attraction. The overwhelming majority (96%) of the SWR's wine farms indicated that wine is their essential feature in attracting wine tourists (see Table 4.9).

Table 4.9: Primary attractions and the degree of commercialisation and commodification in the SWR, 2002

ATTRACTION	NUMBER OF FARMS	PERCENTAGE OF SWR	AVERAGE C VALUE
WINE IS PRIMARY ATTRACTION	88	96%	37%
OTHER PRIMARY ATTRACTION	4	4%	50%
SWR	92	100%	38%

There are only four farms which consider other features to be their primary farm attraction, but their average C value is considerably higher (13%) than those with wine as the primary attraction. Table 4.10 relates commercialisation and commodification values to this explanatory variable.

Table 4.10: Primary farm attraction by commercialisation and commodification class in the SWR, 2002

	WINE AS PRIMARY ATTRACTION					
	YES		NO		ROW TOTALS	
CLASS OF C	NO.	%	NO.	%	NO.	%
HIGH (50%-100%)	9	10%	2	50%	11	12%
MODERATE (38%-49%)	24	27%	0	0%	24	26%
AVERAGE (25%-37%)	46	52%	2	50%	48	52%
LOW (1%-24%)	9	10%	0	0%	9	10%
COLUMN TOTALS	88	96%	4	4%	92	100%

Some percentages do not add up to 100% due to rounding.

Half of the farms with other primary attractions are in the high C class, including Spier that has the highest degree of commercialisation and commodification in the SWR (77%), and Hazendal (59%). Both of these 'high' C class farms are developed wine destinations with the primary attractions being the "resort as a whole" (Hendrikse, 2002, pers com) for Spier and the "Russian museum" for Hazendal (2002). The remaining two farms with other primary attractions are Lyngrove (guesthouse) and Morgenster (olives), both of which are in the 'average' C class. Table 4.11 disaggregates the variable according to wine route in the SWR.

Table 4.11: Primary attractions and the degree of commercialisation and commodification per wine route in the SWR, 2002

WINE ROUTE	NUMBER OF FARMS	WINE IS PRIMARY ATTRACTION (% OF WINE ROUTE)	OTHER PRIMARY ATTRACTION (% OF WINE ROUTE)	AVERAGE C VALUE
Greater Simonsberg	24	100%	0%	38%
Stellenboschberg	11	100%	0%	37%
Stellenbosch Hills	18	99%	1%	42%
Bottelary Hills	14	99%	1%	35%
Helderberg	25	98%	2%	35%
Stellenbosch Wine Region	92	96%	4%	38%

Wine as the primary attraction of wineries is the norm in the SWR. This almost equally important and region-wide occurrence of wine as the primary farm attraction exemplifies the importance of wine to all the farms, regardless of commercialisation and commodification levels.

4.3.4 Wine farm visitor capacity

Each wine farm in the survey provided data about its visitor capacities in terms of the numbers of visitors it can accommodate, serve or cater for. The capacities of various commercialisation and commodification indicators were discussed in Chapter 3. Table 4.12 compares the capacity indicator deemed most descriptive of the size of a wine farm, namely visitor facilities, with the classes of commercialisation and commodification.

The four categories of capacity were calculated using the quartile function of MS Excel to identify four appropriate divisions of the entire scale of SWR visitor capacity data from the lowest capacity of six to the highest of 800. Quartiles were used as no natural breaks in the data could be found.

Table 4.12: Wine farm visitor capacity by commercialisation and commodification class in the SWR, 2002

	VISITOR FACILITY CAPACITY									
	6-19		20-39		40-79		80-800		ROW TOTALS	
CLASS OF C	NO.	%	NO.	%	NO.	%	NO.	%	NO.	%
HIGH (50%-100%)	0	0%	0	0%	0	0%	11	48%	**11**	**12%**
MODERATE (38%-49%)	0	0%	3	13%	11	41%	10	43%	**24**	**26%**
AVERAGE (25%-37%)	13	72%	18	75%	15	56%	2	9%	**48**	**52%**
LOW (1%-24%)	5	28%	3	13%	1	4%	0	0%	**9**	**10%**
COLUMN TOTALS	**18**	**20%**	**24**	**26%**	**27**	**29%**	**23**	**25%**	**92**	**100%**

Some percentages do not add up to 100% due to rounding.

Clearly there is a direct relationship between farm size (measured by visitor capacity) and level of C. Farms with high and moderate values tend to have large capacities while those with average and low C values are smaller by this size measure. Table 4.13 further supports this direct relationship between size and degree of commercialisation and commodification.

Table 4.13: Visitor facility capacity and the degree of commercialisation and commodification per wine route in the SWR, 2002

WINE ROUTE	NUMBER OF FARMS	AVERAGE VISITOR FACILITIES CAPACITY	AVERAGE C VALUE
Stellenbosch Hills	18	124	42
Greater Simonsberg	24	82	38
Stellenboschberg	11	70	37
Helderberg	25	61	35
Bottelary Hills	14	37	35
Stellenbosch Wine Region	92	76	38

This relationship was expected as Bruwer (2003: 426) has pointed out that “most often, the size of the wine enterprises determines the various business activities in which they engage and their degree of involvement therein”.

4.3.5 Wine farm accessibility

Accessibility refers to the relative ease by which the locations of activities can be reached from a given location. There are a number of types of accessibility but as this factor involves the actual location of the wine farms in relation to their degree of commercialisation and commodification, spatial accessibility (emphasising the spatial/distance variable as a barrier or facilitator) was used (Luo & Wang, 2003).

The accessibility of each farm in the SWR was measured in terms of three variables, namely:

- the approximate distance via road (the shortest actual road route) from Cape Town (V&A Waterfront);
- the approximate distance via road from Stellenbosch (Tourism and Information Bureau Offices); and
- location next to a main road (the easiest access).

Cape Town and Stellenbosch were selected as nodes for calculating distance variables as they are the most important major metropolitan and urban centres relative to the SWR respectively, and are used in similar distance studies of tourism in the Stellenbosch area (Baxter, 1992; Speirs, 2003).

There are eight classes of distance to farms, four representing the distance from Cape Town and four representing the distance from Stellenbosch. The categories were calculated separately for each of the two independent location variables because the range of distances varied between 1km and 28.5km for Stellenbosch and 33km to 67km for Cape Town. The classes were determined using the quartile function of MS Excel.

Each accessibility variable is discussed in turn starting with farm distance from Cape Town. It was expected that the farther the farm is from Cape Town, the higher the degree of commercialisation and commodifcation would be in order to attract visitors. Table 4.14 summarises this measure crosstabulated with the four classes of commercialisation and commodification. This distance variable shows no clear and consistent direct nor indirect relationship to degree of commercialisation and commodification.

Table 4.14: Wine farm distance from Cape Town by commercialisation and commodification class in the SWR, 2002

	DISTANCE FROM CAPE TOWN									
	33km-45km		45.5km-50km		50.5km-54km		54.5km-67km		ROW TOTALS	
CLASS OF C	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**
HIGH (50%-100%)	3	14%	4	14%	1	5%	3	13%	**11**	**12%**
MODERATE (38%-49%)	3	14%	9	31%	3	17%	9	39%	**24**	**26%**
AVERAGE (25%-37%)	14	64%	13	45%	14	78%	7	30%	**48**	**52%**
LOW (1%-24%)	2	9%	3	10%	0	0%	4	17%	**9**	**10%**
COLUMN TOTALS	**22**	**24%**	**29**	**32%**	**18**	**20%**	**23**	**25%**	**92**	**100%**

Some percentages do not add up to 100% due to rounding.

Distance from Cape Town does not appear to have any measurable influence on farm levels of commercialisation and commodification in the SWR. Similarly, wine route average distances from Cape Town do not consistently relate to wine route average C values (Table 4.15).

Table 4.15: Distance from Cape Town and the degree of commercialisation and commodification per wine route in the SWR, 2002

WINE ROUTE	AVERAGE DISTANCE OF WINE FARM FROM CAPE TOWN	AVERAGE C VALUE
Bottelary Hills	44km	35%
Stellenbosch Hills	45km	42%
Helderberg	48km	35%
Greater Simonsberg	53km	38%
Stellenboschberg	62km	37%
Stellenbosch Wine Region	50km	38%

A reason for the lack of evidence that the distance from Cape Town exerts influence on the degree of C, is that the farms in the SWR are on average only 50km distant from Cape Town. This equates to an average driving time of 35 to 45 minutes, diminishing the necessity for farms to become commercialised attractions in order to coax tourists to travel the distances to their enterprises. When distance to Stellenbosch is crosstabulated with the degree of commercialisation and commodification, as in Table 4.16, there are signs of a tendency for farms in the high and moderate classes to be farther away. But there are some anomalies, e.g. the number of farms with low C values that are near Stellenbosch and conversely the number

of farms in the high class that are relatively distant from Stellenbosch. This measure is also therefore inconclusive.

Table 4.16: Wine farm distance from Stellenbosch by commercialisation and commodification class in the SWR, 2002

	DISTANCE FROM STELLENBOSCH									
	1km-7.5km		8km-11km		11.5km-14km		14.5km-28.5km		ROW TOTALS	
CLASS OF C	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**	**NO.**	**%**
HIGH (50%-100%)	6	26%	1	4%	1	5%	3	13%	**11**	**12%**
MODERATE (38%-49%)	6	26%	9	38%	8	36%	1	4%	**24**	**26%**
AVERAGE (25%-37%)	7	30%	14	58%	11	50%	16	70%	**48**	**52%**
LOW (1%-24%)	4	18%	0	0%	2	9%	3	13%	**9**	**10%**
COLUMN TOTALS	**23**	**25%**	**24**	**26%**	**22**	**24%**	**23**	**25%**	**92**	**100%**

These inconsistencies in distance impacts on commercialisation and commodification are reduced when this measurement is disaggregated according to wine route (see Table 4.17).

Table 4.17: Distance from Stellenbosch and the degree of commercialisation and commodification per wine route in the SWR, 2002

WINE ROUTE	AVERAGE DISTANCE OF WINE FARM FROM STELLENBOSCH	AVERAGE C VALUE
Helderberg	15km	35%
Bottelary Hills	12.5km	35%
Greater Simonsberg	11km	38%
Stellenbosch Hills	9km	42%
Stellenboschberg	7km	37%
Stellenbosch Wine Region	11.5km	38%

All of the wine routes, except Stellenboschberg, have average distances from Stellenbosch which correlate well with their average degree of commercialisation and commodification in terms of the C value increasing with proximity to Stellenbosch. The average distance of farms from Stellenbosch in the SWR (11.5km) is exactly the same as Bruwer's (2003) mean distance between wine enterprises and the nearest town or main centre for the entire South African wine route system, affirming that the SWR reflects the overall South African wine region picture. The short distance of the SWR average offers an explanation for the lack of a

consistent relationship between distance from Stellenbosch and commercialisation and commodification, as the average driving time is less than 10 minutes.

A final measurement of farm accessibility, location next to main roads, shows a tendency to relate positively to a degree of commercialisation and commodification as shown in Table 4.18. It was expected that farms located on main roads would have higher levels of C as they are exposed to more tourist traffic and as such provide for more visitors. It is noteworthy that just under half of the farms in the SWR are on main roads and just over half are not.

Table 4.18: Wine farms next to main roads by commercialisation and commodification class in the SWR, 2002

	FARM NEXT TO MAIN ROAD					
	YES		NO.		ROW TOTALS	
CLASS OF C	NO.	%	NO.	%	NO.	%
HIGH (50%-100%)	9	21%	2	4%	**11**	**12%**
MODERATE (38%-49%)	11	26%	13	27%	**24**	**26%**
AVERAGE (25%-37%)	20	47%	28	57%	**48**	**52%**
LOW (1%-24%)	3	7%	6	12%	**9**	**10%**
COLUMN TOTALS	**43**	**47%**	**49**	**53%**	**92**	**100%**

Some percentages do not add up to 100% due to rounding.

When this factor is compared to the average commercialisation and commodification levels at the wine route level, the routes with above average proportions of farms next to main roads correlate irregularly with the average C values (see Table 4.19).

Table 4.19: Wine farms next to main roads and the degree of commercialisation and commodification per wine route in the SWR, 2002

WINE ROUTE	PERCENTAGE OF WINE FARMS ON MAIN ROADS	AVERAGE C VALUE
Bottelary Hills	71%	35%
Greater Simonsberg	54%	38%
Stellenbosch Hills	50%	42%
Helderberg	39%	35%
Stellenboschberg	18%	37%
Stellenbosch Wine Region	47%	38%

Based on this examination of three accessibility measurements, there is no clear or consistent relationship between wine farm spatial accessibility and the degree of commercialisation and commodification in the SWR. The close proximity to the major metropolitan area (Cape Town) and the nearest urban centre (Stellenbosch) along with short average driving times, diminish the possible effects spatial accessibility may have on the level of commercial attractions on the wine farms.

4.3.6 Wine farm ownership

This factor involves the type of ownership of each wine farm. Farm ownership in the SWR is categorised into four types, namely a single South African owner, an overseas owner (foreigner), a family and a company (De Kock, 2004, pers com). The individual-owned and family-owned farms are the most prominent forms of ownership accounting for almost two-thirds of the SWR's wineries. Overseas-owned farms were expected to have the highest C values, then company-owned, then family-owned and lastly single-owned farms, based on the supposition that the amount of investment capital available will decrease from overseas-owned through the types to single owners. The evidence in Table 4.20 clearly supports this contention.

Table 4.20: Wine farm ownership type and the degree of commercialisation and commodification in the SWR, 2002

OWNERSHIP TYPE	NUMBER OF FARMS	PERCENTAGE OF SWR	AVERAGE C VALUE
OVERSEAS OWNER	13	14%	45%
COMPANY-OWNED	20	22%	44%
FAMILY-OWNED	28	30%	37%
SINGLE OWNER	31	34%	31%
SWR	92	100%	38%

When the four ownership types are crosstabulated with the four levels of C as in Table 4.21, the expected relationship is borne out again. Interestingly, no single-owned winery has a C value in the high class and no foreign-owned winery is in the low C class.

Table 4.21: Wine farm ownership type by commercialisation and commodification class in the SWR, 2002

	WINE FARM OWNERSHIP									
	SINGLE		FAMILY		COMPANY		OVERSEAS		ROW TOTALS	
CLASS OF C	NO.	%	NO.	%	NO.	%	NO.	%	NO.	%
HIGH (50%-100%)	0	0%	2	7%	6	30%	3	23%	**11**	**12%**
MODERATE (38%-49%)	3	10%	9	32%	5	25%	7	54%	**24**	**26%**
AVERAGE (25%-37%)	23	74%	14	50%	8	40%	3	23%	**48**	**52%**
LOW (1%-24%)	5	16%	3	11%	1	5%	0	0%	**9**	**10%**
COLUMN TOTALS	**31**	**34%**	**28**	**30%**	**20**	**22%**	**13**	**14%**	**92**	**100%**

When ownership is considered by wine route and combinations of ownership types are used, further support for the expected relationship is forthcoming (see Table 4.22).

Table 4.22: Proportion of wine farm ownership type and the degree of commercialisation and commodification per wine route in the SWR, 2002

WINE ROUTE	SINGLE	FAMILY	COMBINED	COMPANY	OVERSEAS	COMBINED	AVERAGE C VALUE
Stellenbosch Hills	28%	28%	**56%**	39%	6%	**45%**	42%
Greater Simonsberg	29%	46%	**75%**	8%	17%	**25%**	38%
Stellenboschberg	36%	18%	**54%**	27%	18%	**45%**	37%
Helderberg	48%	12%	**60%**	24%	16%	**40%**	35%
Bottelary Hills	21%	50%	**71%**	14%	14%	**28%**	35%
Stellenbosch Wine Region	34%	30%	64%	22%	14%	36%	38%

Some percentages do not add up to 100% due to rounding.

With the exception of Greater Simonsberg, the greater the combined percentage of company- and foreign-owned wineries, the greater the route average C value. And conversely, there is a tendency for increasing average C values to relate to decreasing proportions of combined single- and family-owned wineries with Greater Simonsberg again being the non-fitting case.

Despite some small aberrations, ownership type appears to be a reliable indicator of the level of commercialisation and commodification on farms in the SWR, there being a tendency for singly- and family-owned farms to be less commodified and commercialised and overseas- and company-owned farms to be more so. The next section will attempt to pull all the findings and explanations together.

4.4 THE BOTTLE AT A GLANCE: SYNTHESIS OF FINDINGS AND INTERPRETATIONS

This chapter has addressed the second and third objectives of this study by determining the degree of commercialisation and commodification for each farm in the SWR and identifying, describing and examining the distribution of commercialisation and commodification in the region. Table 4.1 lists each farm's calculated C value, Table 4.2 shows the proportional distribution of commercialisation and commodification according to the four C classes per wine route in the SWR, and Figure 4.1 shows the spatial distribution of degrees of commercialisation and commodification in the SWR at farm level. Explanations for the varying degrees of commercialisation and commodification were examined using six different explanatory factors.

Table 4.23 summarises the distribution of the levels of commercialisation and commodification attained by each wine route in the SWR. The wine routes are ranked according to the average degree of commercialisation and commodification for their constituent farms.

Table 4.23: Percentage of farms in each C class and the average degree of commercialisation and commodification per wine route in the SWR, 2002

	PERCENTAGE OF FARMS IN C CLASS					
WINE ROUTE	**HIGH (50%-100%)**	**MODERATE (38%-49%)**	**AVERAGE (25%-37%)**	**LOW (1%-24%)**	**% OF SWR**	**AVERAGE C VALUE**
Stellenbosch Hills	**28%**	22%	50%	0%	**20%**	**42%**
Greater Simonsberg	8%	**42%**	46%	4%	**26%**	**38%**
Stellenboschberg	**18%**	27%	36%	**18%**	**12%**	**37%**
Helderberg	4%	24%	**60%**	12%	**27%**	**35%**
Bottelary Hills	7%	**7%**	**71%**	14%	**15%**	**35%**
Stellenbosch Wine Region	**12%**	**26%**	**52%**	**10%**	**100%**	**38%**

Some percentages do not add up to 100% due to rounding.

Stellenbosch Hills remains dominant with the highest proportion of farms in the high C class (28%) over double the SWR's proportion for this class (12%). Greater Simonsberg is ranked second with the highest proportion of farms in the moderate category (42%), substantially higher than the SWR proportion (26%). Although Stellenboschberg has a greater proportion of high C class farms than Greater Simonsberg, it has the highest proportion of farms in the

low C class (18%), reducing its ranking to third. The Helderberg and Bottelary Hills routes are equally ranked fourth according to average C value with both routes having average C class proportions above the SWR's 52 percent. Helderberg has 60 percent of its farms in this class, while Bottelary Hills, although having a higher average C class farm proportion than Helderberg (71%), has the smallest proportion of farms in the moderate class (7%).

The results of the examination of six explanatory factors and their variables used to explain the varying degrees of commercialisation and commodification are summarised in Table 4.24. Examination of the eleven variables for which wineries have average C values equal to or in excess of the SWR average (38%), draws the analysis to a close.

Table 4.24: Compendium of all 24 explanatory variables and classes of commercialisation and commodification in the SWR, 2002

	PERCENTAGE OF SWR FARMS IN C CLASS						
EXPLANATORY VARIABLE	**HIGH (50%-100%)**	**MODERATE (38%-49%)**	**AVERAGE (25%-37%)**	**LOW (1%-24%)**	**% OF SWR**	**AVERAGE C VALUE***	
CAPACITY: 80-800	48%	43%	9%	0%	**25%**	**51%**	ABOVE AVERAGE
OTHER PRIMARY ATTRACTION	50%	0%	50%	0%	**4%**	**50%**	
OVERSEAS OWNER	23%	54%	23%	0%	**14%**	**45%**	
COMPANY OWNED	30%	25%	40%	5%	**22%**	**44%**	
NEXT TO MAIN ROAD	21%	26%	47%	7%	**47%**	**41%**	
STELLENBOSCH: 1KM-7.5KM	26%	26%	30%	18%	**25%**	**40%**	
WINE TOURISM EFFORTS	14%	30%	47%	10%	**88%**	**39%**	
STELLENBOSCH: 8KM-11KM	4%	38%	58%	0%	**26%**	**39%**	
SAEWR MEMBER	12%	30%	49%	9%	**84%**	**38%**	AVERAGE
CAPE TOWN: 45.5KM-50KM	14%	31%	45%	10%	**32%**	**38%**	
CAPE TOWN: 54.5KM-67KM	13%	39%	30%	17%	**25%**	**38%**	
WINE PRIMARY ATTRACTION	10%	27%	52%	10%	**96%**	**37%**	BELOW AVERAGE
CAPACITY: 40-79	0%	41%	56%	4%	**29%**	**37%**	
CAPE TOWN :33KM-45KM	14%	14%	64%	9%	**24%**	**37%**	
CAPE TOWN: 50.5KM-54KM	5%	17%	78%	0%	**20%**	**37%**	
STELLENBOSCH: 11.5KM-14KM	5%	36%	50%	9%	**24%**	**37%**	
FAMILY OWNED	7%	32%	50%	11%	**30%**	**37%**	
NOT NEXT TO MAIN ROAD	4%	27%	57%	12%	**53%**	**35%**	
STELLENBOSCH: 14.5KM-28.5KM	13%	4%	70%	13%	**25%**	**34%**	
NOT SAEWR MEMBER	13%	7%	67%	13%	**16%**	**34%**	
CAPCITY: 20-39	0%	13%	75%	13%	**26%**	**32%**	
SINGLE OWNER	0%	10%	74%	16%	**34%**	**31%**	
NO WINE TOURISM EFFORTS	0%	0%	91%	9%	**12%**	**29%**	
CAPCITY: 6-19	0%	0%	72%	28%	**20%**	**29%**	
STELLENBOSCH WINE REGION	**12%**	**26%**	**52%**	**10%**	**100%**	**38%**	

*Rows arranged by descending average C value.

Some percentages do not add up to 100% due to rounding.

Large farm size (measured by visitor capacity) is clearly related to high and moderate levels of commercialisation with 91 percent of the farms in the largest capacity category being moderately to highly commodified. Farms with primary attractions other than wine have an average C value of 50 percent, but their small frequency (four farms) dismisses any reliable indication of a relationship.

Overseas-owned farms tend towards high and moderate C values (77%) while company-owned farms are less so (55%). Accessibility variables have a mixed influence on commercialisation and commodification levels with farms close to main roads and closer to Stellenbosch generally having more or less equal proportions of farms with high/moderate and average/low C values, while proximity to Cape Town seems to exert little or no impact. The absence of a clear relationship between accessibility and commercialisation levels can be attributed to the relatively short average distances that equate to short average driving times for reaching wineries in the SWR, i.e. less than 45 minutes from Cape Town and less than 10 minutes from Stellenbosch.

The decision to make efforts to encourage wine tourism does not convincingly indicate the level of commercialisation. For although 44 percent of farms that do make efforts are in the high and moderate C classes, 57 percent of the SWR farms are in the average and low classes. Interestingly, however, all farms that do not make an effort are in the average and low classes. Related to wine tourism efforts was the question of SAEWR membership, which also does not reliably indicate the farm level of C. Only 42 percent of member farms are in the high and moderate classes whereas 58 percent are in the average and low classes.

The above factors and variables have shed some light on the varying degrees of commercialisation and commodification attained. Other variables, which have not been examined but which hold promise as explanatory factors, are supply and demand, available finances and farm management development goals. These variables represent the ability of farms to be commercialised and commodified, and whether or not their managers or owners want to. Such economic and business management factors fall beyond the scope of this geographical study. The final chapter revisits this study's objectives.

5. FINISHING THE BOTTLE: CONCLUSION

This chapter comments on how successful (or not) the study has been in fulfilling its purpose and achieving its objectives. The study's limitations are recorded, suggestions are made on how similar studies can avoid these and some avenues for future research on the topic are outlined.

5.1 END OF THE WINE TOUR: RESEARCH ACHIEVEMENTS

The study aimed to establish the nature and extent of commercialisation and commodification of wine farms and wine routes in the Stellenbosch Wine Region. In order to realise this aim, three research objectives were identified and pursued.

The first objective was to compile a comprehensive list of the manifestations and indicators that describe commercialisation and commodification in the wine tourism product on wine farms in a wine region. This was achieved in the final compilation of a research questionnaire (see Appendix 1) that catalogues an extensive list of possible manifestations and indicators of wine farm commercialisation and commodification. The components and elements of the list were gleaned from the reviewed literature and personal experience, and from suggestions made during interviews and discussions with persons involved in the wine and tourism industries. The list is deemed to be quite complete and thorough given that only six additional manifestations or indicators were named by respondents during the survey.

The second objective was to determine the degrees and levels of commercialisation and commodification at each wine farm on the five wine routes of the SWR. By using data extracted from the respondent wine farm questionnaires in conjunction with the average importance weights allocated to the manifestations and indicators by focus group members, a number of indices were calculated for each wine farm and wine route to indicate the degrees of commercialisation and commodification present in the SWR. These indices successfully quantify the scale of commercialisation and commodification in the SWR thereby contributing to the realisation of the second objective. The reaching of the third objective built on this foundation.

The third objective was to uncover, portray, describe and explain the varying distribution of commercialisation and commodification levels in the SWR. Four classes of commercialisation and commodification were distinguished, namely high, moderate, average and low. The spatial distribution of the farms, colour-coded according to C class to indicate each one's degree of commercialisation and commodification (Fc&c), was mapped for each of the ten main categories (except "other" due to negligible size) by which the levels of commercialisation and commodification were measured. Eventually the composite measure (C) of each wine farm's degree of commercialisation and commodification was mapped to show the overall spatial distribution of the four classes of commodification and commercialisation in the SWR.

Six independent variables were investigated to help explain variations in the levels and distribution of commodification of wineries in the five wine routes. The variables that tend to indicate levels of commercialisation and commodification were farm size (capacity) and the type of farm ownership. The impact of primary farm attraction was dismissed due to the small frequency of farm attractions other than wine. Accessibility variables had mixed results without conclusive relationships, while SAEWR membership and efforts to encourage wine tourism also demonstrated a lack of consistent correlation in their influence on or relationship with the levels of commercialisation and commodification.

In satisfying the three research objectives, the study has quantitatively and visually represented the extent, and characterised, described and interpreted the nature of commercialisation and commodification of wine farms and wine routes in the Stellenbosch Wine Region, thus accomplishing the study's purpose.

5.2 ANOTHER BOTTLE OF WINE: STUDY LIMITATIONS AND AVENUES FOR FUTURE RESEARCH

There are a number of identified limitations in this research that can be given attention in future studies. In terms of methodology, the focus group exercise does not include the wine tourist perspective. However, a considered decision was made to examine the importance of manifestations and indicators from only a supply-orientated (wine farm) perspective. Nonetheless, the focus group needs to be expanded in terms of size and diversity if a broader representation of commercialisation and commodification is to be developed. A future

study's focus group could generate a separate demand-orientated (tourist) perspective on the importance of commercialisation and commodification manifestations and indicators and compare them to the supply (farm) perspective. This comparison could promote the identification of an optimum and more representative wine tourism product, satisfying both tourists and wine farms.

The omission of other independent factors and variables which could have been used to explain the levels of commercialisation and commodification is a limitation. Given the exploratory nature of this study's objectives and the limited scope, the six factors are a satisfactory start. From a geographical point of view, the omission of any rigorous attempts to analyse spatial patterns is regrettable. The spatial distribution of commercilisation and commodification was described in terms of farm location, wine route proportions and visual representation in the form of maps. The explanatory factors examined and explained some patterns of distribution, however quantitive analysis of spatial distributions using statistical methods such as centres of gravity, concentration indices and nearest neighbour analysis could have exposed and described the existence or not of spatial patterns.

Inclusion of all (106 in 2002) the wine farms in the SWR would have given a fuller and more representative picture. The recent proliferation of wineries in the SWR calls for further research that would include the more than 300 wine producers now (2004) present in the SWR (De Kock, 2004, pers com). Further study should include more wine farms and be expanded to include other wine regions such as Franschhoek, Paarl and Wellington. A comparison of winery commercialisation and commodification in different wine regions will hopefully provide insights into the influences of localised causative factors. A benchmark for commercial wine tourism products available in the various regions could also be developed.

The wine tourism product introduces another concept that this research does not explore, namely "over-commercialisation". It has been suggested that commercial activities and commodification of resources actually detract from the wine tourism product by shifting the focus away from wine, the core product (Bruwer, 2003). The tourist perspective on which commercial and commodified farm activities and attractions comprise a good wine tourism product is a dimension to be investigated. This could be achieved by a focus group determining a favourable or negative commercial contribution that manifestations and

indicators make to the wine farm. This data could also be used in determining the optimum wine tourism product mentioned earlier.

5.3 THE LAST DROP: CONCLUDING REMARKS

When the Stellenbosch Wine Region's first wine route, the Stellenbosch Wine Route, was established in 1971 with only three farms, it did not feature large wine tourist destinations with high degrees of commercialisation and commodification. However, it was initially designed with the main objective of selling wine directly to consumers and tourists (Rudeman, 1991). This simple business objective remains today with all the wine farms in the study area presenting some form of commercialisation and commodification that caters to modern wine tourists who have "diverse needs, demands and expectations" (Getz, 2000).

The importance of making such commercial or commodifying efforts, initiatives and developments is not only in their catering to the wine tourist but also in their proven relationship to a wine farm's attraction, reputation, and of course, wine sales. By providing this diversity in the wine tourism product, a wine farm encourages a higher participation level in wine tourism and expands its marketable image and brand.

As the identified increase in wine producers and the growth of the SWR continues, so will the combination and extent of the rural, cultural, environmental and agricultural tourism elements that comprise the wine tourism product develop apace. The concepts of commercialisation and commodification will also develop as part of wine tourism in terms of more diverse manifestations and in the frequency of occurrence. The study has confirmed that they are recognised as the most popular and widespread methods to utilise and develop the geographic location and resources of a wine farm to encourage visitor interest, attraction, and direct and indirect wine sales, with every farm in the SWR having some combination of these manifestations or indicators.

The integration of wine and tourism puts the wine consumer at the origin of wine with the wine experience, and the wine tourist, is further enriched and rewarded through not only enjoying the various wine fermentations, but also by the attractions, facilities and services embodied in manifestations and indicators of commercialisation and commodification.

(Word count = 22629)

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Feichtenchlager H 2002. Owner, Klawervlei Estate. Stellenbosch. Interview on 23 September about commercialization and commodification on wine farms.

Hendrikse S 2002. Guest relations manager, Spier Resort Management (Pty) Ltd. Stellenbosch. Interview on 4 December about commercialization and commodification on wine farms.

Ratcliffe M. 2003. Director, Warwick Estate. Stellenbosch. Interview on 4 April about wine tourism development.

Stapelberg J 2002. Wine shop manager, Stellenzicht Vineyards. Stellenbosch. Interview on 18 November about commercialization and commodification on wine farms.

APPENDIX A: SURVEY QUESTIONNAIRE

Questionnaire number:

Dear Sir / Madam

David Scott, a master's student in the Department of Geography and Environmental Studies at the University of Stellenbosch, is currently researching the commercial development and commodification of the Stellenbosch Wine Region. The research intends to establish the current degree to which wine farms are commercialised and commodified through their initiatives, efforts and facilities to promote and attract wine tourism as well as the distribution patterns of such initiatives. The importance of the research is in the further understanding of the wine tourism product and the establishment of a benchmark for contemporary analysis and future comparison of the Stellenbosch Wine Region.

This questionnaire aims to collect the required information. Please fill this questionnaire in as instructed. It should not take more than **10 minutes.**

Your time, effort and co-operation are greatly appreciated.

COMPLETED QUESTIONNAIRES MUST PLEASE BE RETURNED AS SOON AS CONVENIENTLY POSSIBLE BY EITHER
FAX: 021 855 2189 or
E-MAIL: winedata@netlane.com

Contact details and enquiries:

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QUESTIONNAIRE: Commercialisation and Commodification on Wine Farms

Name of wine farm:_____

Name of respondent:_____

Position of respondent:_____

Date of completion:_____

(Please mark with an **X** where applicable)

1. Is the wine farm a member of the Stellenbosch Wine Routes?

YES:_____NO:_____

2. Does the wine farm make efforts to encourage wine tourism?

YES:_____NO:_____

3. Is **wine** the most important (primary) attraction of the wine farm?

YES:_____ If NO, what is the main attraction? _____

PLEASE INDICATE THE PRESENCE OR ABSENCE OF THE FOLLOWING MANIFESTATIONS OF COMMERCIALISATION AT THIS LOCATION WITH A CROSS (X) IN THE APPROPRIATE BOX OR WRITE THE REQUIRED ANSWER:

CATEGORY	YES	NO
1. EATING FACILITIES	YES	NO
Restaurant		
Prepared picnics		
Private picnicking		
Pre-booked meals		
Packed lunches		
Coffee shop / Tea-room		
Vending machine		
How many customers can the eating facilities accommodate?		
Other (please specify)		
Other (please specify)		
2. ACCOMMODATION	YES	NO
Hotel		
Cabins / Bungalows		
Guesthouse / Bed & Breakfast		
Rooms for rent (e.g. granny-flats, student accommodation)		
Camping / Caravan Park		
How many people can the accommodation facilities house?		
Other (please specify)		
Other (please specify)		

CATEGORY	YES	NO
3. WINE SALES	YES	NO
Specific sales area		
Sell own wines		
Sell other wines		
Sell other grape-related products (grape juice, brandy, etc.)		
Seated tasting area		
Standing tasting area		
Comfort areas (e.g. shade, seating, waiting)		
Tasting and sales only by appointment		
Tasting fee levied		
Trained sales and tasting staff		
Open on Sundays		
Open on public holidays		
Wine auctions		
Wine festivals		
Delivery facilities for wine purchases		
Mail order sales		
Internet sales		
How many visitors can the tasting area accommodate?		
Other (please specify)		
Other (please specify)		

CATEGORY	YES	NO

4. VISITOR FACILITIES	YES	NO
Reception / Information centre		
Brochures / Pamphlets		
Signage / Directions		
Tour group arrangements		
Parking for tour buses		
Parking for motor cars		
Facilities for disabled visitors		
Toilets		
Drinking water		
Children's playground		
How many tourists (max.) can be facilitated at one time?		
Other (please specify)		
Other (please specify)		

5. EDUCATIONAL	YES	NO
Guided cellar tours		
Guided vineyard tours		
Personalised tours by appointment		
Wine-making courses		
Wine-tasting courses		
Hands-on experiences (e.g. grape crushing)		
Wine barrel-making		
Instructional books / Leaflets		
Other (please specify)		
Other (please specify)		

CATEGORY	YES	NO

6. RETAIL	YES	NO
Cheesery		
Fruit and/or Vegetable sales		
Plant nursery		
Craft market		
Pottery		
Gift / Souvenir shop		
Farm / Cellar branded merchandise (e.g. clothes)		
Other (please specify)		
Other (please specify)		

7. HERITAGE	YES	NO
Art gallery		
Antique sales		
Museum / Historical display		
Monument(s)		
Historical building(s)		
Other (please specify)		
Other (please specify)		

CATEGORY	YES	NO

CATEGORY

8. OUTDOOR	YES	NO
Wild game / Nature reserve		
Farm animal viewing / feeding area		
Bird-watching		
Fishing		
Hiking trail(s)		
4x4 trail(s)		
Mountain bike trail(s)		
Stud farming		
Horse-riding		
Other (please specify)		
Other (please specify)		

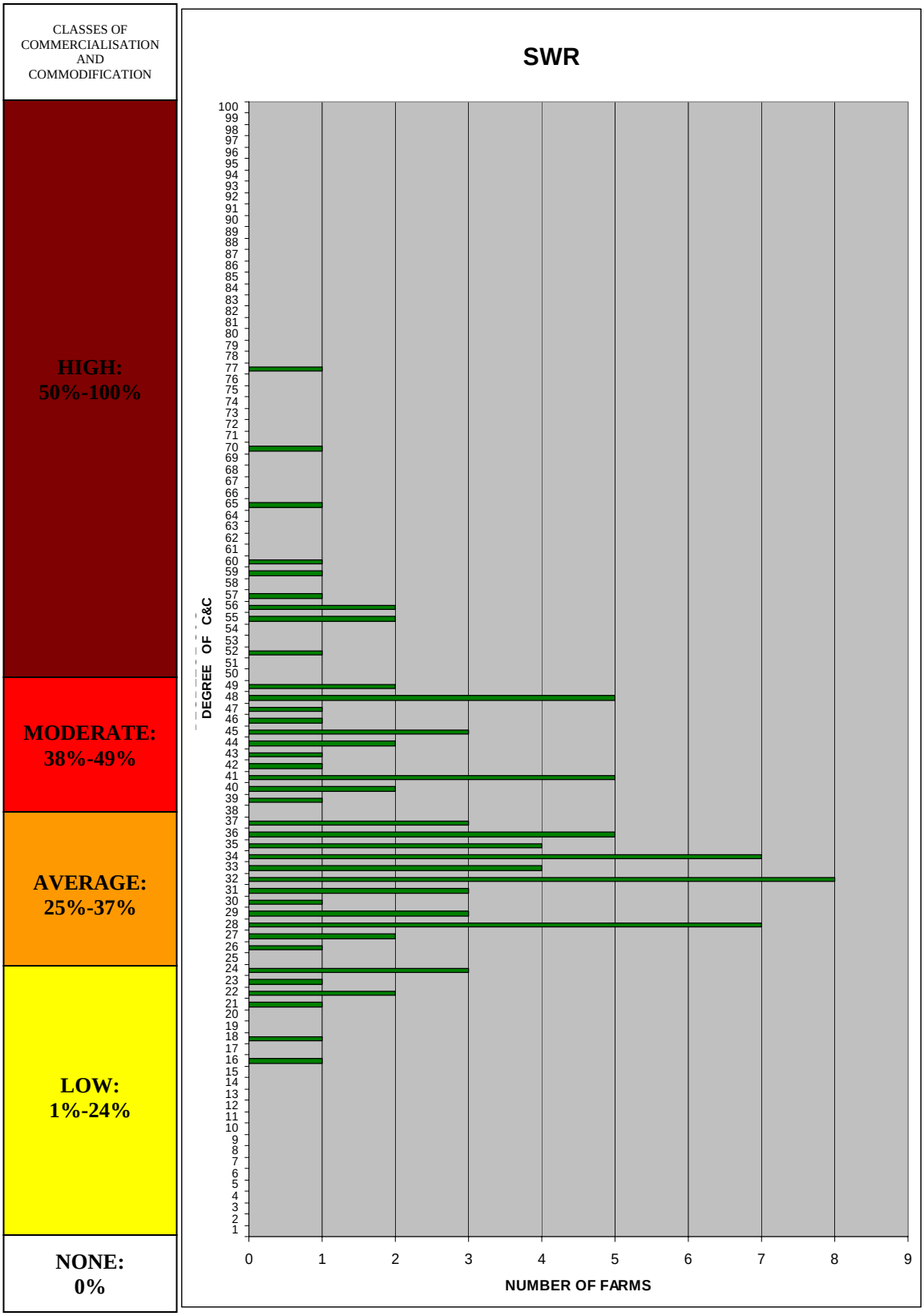
10. OTHER (please specify)

9. MISCELLANEOUS	YES	NO
Conference centre		
Venue for private functions (eg. Weddings)		
Film locations		
Heli-pad		
Airfield		
Amphitheatre		
Sports facilities (please specify)		
Other (please specify)		
Other (please specify)		

NOTES OR COMMENTS:

Your time, effort and co-operation are greatly appreciated.
COMPLETED QUESTIONNAIRES MUST PLEASE BE RETURNED AS SOON AS CONVENIENTLY POSSIBLE BY EITHER
FAX: 021 855 2189 OR E-MAIL: winedata@netlane.com

APPENDIX B: CLASSES OF DEGREES OF COMMERCIALISATION AND COMMODIFICATION IN THE SWR, 2002



APPENDIX C: LEVEL OF COMMERCIALISATION AND COMMODIFICATION FOR EACH INDICATOR CATEGORY (FC&C) PER WINE FARM IN THE SWR, 2002

STELLENBOSCH HILLS	Percentage level of commercialisation and commodification per indicator category (Fc&c)									
FARM	VISITOR FAC.	WINE SALES	EDUCA-TION	MISC.	HERI-TAGE	OUT-DOOR	EATING FAC.	RETAIL	ACCOM.	OTHER
Amani	62	63	12	50	22	0	0	17	0	0
Asara	90	63	39	32	17	0	13	17	0	0
Bergkelder	93	80	65	50	22	0	57	34	0	0
Bonfoi	72	63	0	0	23	11	13	17	0	0
Carisbrooke	52	51	25	15	0	0	0	0	0	0
Clos Malverne	82	64	27	15	0	0	0	0	0	0
JC le Roux	93	69	27	35	0	0	36	34	0	0
Jordan	62	74	39	0	0	0	13	17	0	0
Meerlust	72	59	27	13	39	0	0	0	0	0
Meinert	71	61	12	32	0	0	0	0	0	0
Middelvlei	83	69	27	50	0	24	14	17	0	0
Neethlingshof	100	80	52	62	39	0	66	0	0	0
Oude Libertas	100	80	87	75	61	0	63	34	0	0
Overgaauw	61	74	0	0	23	0	0	17	0	0
Spier	100	97	51	87	100	55	62	49	23	31
Vlottenburg	72	57	13	0	0	0	0	0	0	0
Welmoed	100	80	0	13	23	0	36	17	0	0
Zevenwacht	100	75	39	62	23	91	70	50	71	0
CATEGORY C&C INDEX	77	70	30	31	22	10	25	18	5	2

GREATER SIMONSBERG	Percentage level of commercialisation and commodification per indicator category (Fc&c)									
FARM	VISITOR FAC.	WINE SALES	EDUCA-TION	MISC.	HERI-TAGE	OUT-DOOR	EATING FAC.	RETAIL	ACCOM.	OTHER
Camberley	62	69	35	0	0	0	14	0	25	0
De Meye	83	52	12	0	0	0	0	0	0	0
Delaire	73	69	12	18	0	0	50	34	23	0
Delheim	100	69	62	13	0	0	22	47	0	0
DelVera	100	89	36	35	0	37	52	70	0	0
Glenhurst	93	61	27	13	21	0	0	0	0	0
Hoopenburg	62	64	0	0	0	11	0	17	0	0
Kanonkop	79	75	24	18	0	0	27	17	0	0
Knorhoek	79	74	39	0	0	0	14	17	25	0
Koelenhof	70	76	0	0	0	13	13	34	0	0
Laibach	69	80	12	0	0	0	0	0	0	0
L'Avenir	73	63	39	18	0	11	27	12	25	22
Lievland	52	69	0	0	23	0	13	17	0	0
Morgenhof	93	80	39	48	61	13	52	17	0	0

Appendix C continued overleaf

Appendix C continued

GREATER SIMONSBERG (continued)	VISITOR FAC.	WINE SALES	EDUCA-TION	MISC.	HERI-TAGE	OUT-DOOR	EATING FAC.	RETAIL	ACCOM.	OTHER
Muratie	52	74	0	15	0	0	14	12	23	0
Remhoogte	52	49	39	0	22	35	27	12	0	0
Rustenburg	93	58	12	15	39	21	0	17	0	0
Simonsig	100	58	39	15	0	0	14	34	0	0
Slaley	63	63	12	0	0	0	14	12	16	22
Starke	41	22	0	15	23	0	0	0	25	0
Thelema	73	56	12	0	0	0	0	17	0	0
Uitkyk	82	74	39	44	61	0	14	0	0	0
Warwick	83	75	51	0	0	35	52	17	0	0
Zorgvliet	83	64	12	30	61	0	74	34	25	0
CATEGORY C&C INDEX	75	66	23	12	13	7	21	19	8	2

STELLENBOSCH-BERG	Percentage level of commercialisation and commodification per indicator category (Fc&c)									
FARM	**VISITOR FAC.**	**WINE SALES**	**EDUCA-TION**	**MISC.**	**HERI-TAGE**	**OUT-DOOR**	**EATING FAC.**	**RETAIL**	**ACCOM.**	**OTHER**
Blaauklippen	100	81	27	50	44	0	50	72	0	17
De Trafford	79	46	27	0	0	0	0	0	0	0
Dornier	93	74	12	30	61	25	52	0	0	0
Klein Gustrouw	31	28	39	0	39	10	13	0	0	0
Kleine Zalze	90	69	39	35	0	0	77	17	23	0
Lanzerac	93	69	27	62	0	0	62	34	48	18
Le Riche	41	44	12	15	23	0	0	0	25	0
Niel Ellis	73	74	0	15	0	0	0	0	0	0
Stellenzicht	51	81	12	0	0	0	0	34	0	0
Vriesenhof	73	36	15	0	0	0	0	0	0	0
Waterford	82	80	40	13	0	0	13	0	0	0
CATEGORY C&C INDEX	73	62	23	20	15	3	24	14	9	3

HELDERBERG	Percentage level of commercialisation and commodification per indicator category (Fc&c)									
FARM	**VISITOR FAC.**	**WINE SALES**	**EDUCA-TION**	**MISC.**	**HERI-TAGE**	**OUT-DOOR**	**EATING FAC.**	**RETAIL**	**ACCOM.**	**OTHER**
Alto	83	63	39	0	23	0	0	0	0	0
Annandale	79	80	27	0	61	24	0	17	16	0
Audacia	63	63	0	0	21	0	0	0	0	13
Avontuur	62	81	24	45	41	8	53	34	0	0
Bilton	100	75	24	15	23	10	30	34	0	0
Cordoba	62	53	27	0	0	0	0	0	0	0
Dellrust	83	45	12	0	0	0	0	0	0	0
Eikendal	90	75	27	18	0	13	50	17	41	0
Forrester	71	61	12	32	0	0	22	0	25	0
Grangehurst	31	66	12	32	0	0	0	0	25	0

Appendix C continued overleaf

Appendix C continued

HELDERBERG (continued)	VISITOR FAC.	WINE SALES	EDUCA-TION	MISC.	HERI-TAGE	OUT-DOOR	EATING FAC.	RETAIL	ACCOM.	OTHER
Helderberg	100	75	12	18	0	0	76	0	0	0
Helderkruin	93	63	27	0	21	0	14	0	0	0
Ingwe	61	52	39	0	0	0	0	0	0	0
JP Bredell	62	44	12	0	22	0	0	0	0	0
Longridge	62	69	0	0	0	0	0	0	0	0
Lyngrove	73	48	25	35	0	0	38	0	25	0
Morgenster	53	60	27	0	23	0	0	22	0	22
Mount Rozier	53	42	12	32	0	0	0	0	0	0
Onderkloof	83	61	27	0	0	0	14	12	0	0
Post House	53	22	27	0	0	0	0	10	0	0
Rust en Vrede	79	58	39	45	23	24	13	17	16	0
Somerbosch	83	63	12	0	0	0	0	0	0	0
Stonewall	79	58	39	0	0	0	0	0	25	0
Vergelegen	93	69	27	62	82	0	66	34	0	0
Vergenoegd	83	51	12	15	39	0	0	0	0	0
CATEGORY C&C INDEX	73	60	22	14	15	3	15	8	7	1

BOTTELARY HILLS	Percentage level of commercialisation and commodification per indicator category (Fc&c)									
FARM	VISITOR FAC.	WINE SALES	EDUCA-TION	MISC.	HERI-TAGE	OUT-DOOR	EATING FAC.	RETAIL	ACCOM.	OTHER
Bellevue	72	59	12	0	23	12	0	0	0	0
Beyerskloof	90	71	0	0	0	0	0	17	0	0
Devon Hill	83	43	39	0	0	24	13	17	0	22
Fort Simon	72	63	27	32	0	0	14	0	0	0
Goede Hoop	83	66	52	18	39	0	27	0	0	0
Groenland	82	51	27	18	0	13	14	0	0	0
Hartenburg	62	65	0	0	0	0	28	0	0	0
Hazendal	93	76	27	50	82	35	66	34	0	16
Kaapzicht	62	69	0	35	0	0	0	0	16	0
Klawervlei	31	43	27	0	0	0	0	17	23	0
Louisenhof	82	70	0	18	0	0	36	0	16	0
Monterosso	93	58	52	15	0	0	0	0	0	0
Mulderbosch	72	34	12	0	0	0	0	0	0	0
Villiera	82	71	27	0	0	0	0	17	0	0
CATEGORY C&C INDEX	76	60	22	13	10	6	14	7	4	3