

THE DEVELOPMENT OF WINE TOURISM IN SOUTH AFRICA

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DECLARATION

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ABSTRACT

Wine tourism is a form of special interest tourism. Wine tourism is growing and developing globally and it is a significant driver of economic and social development in rural areas. For more than 40 years South Africa's wine tourism industry has developed in an organic and spontaneous manner. The aim of this study was to investigate the current state of wine tourism development in South Africa.

The research objectives were (1) to undertake a comprehensive search for appropriate literature and review the concepts, theories and case studies related to wine tourism, wine route development, regional economic development and corporate social responsibility; (2) to compile a map to illustrate the distribution of all wine-producing farms in South Africa; (3) to create maps to illustrate the distribution of all wine-producing farms involved in wine tourism activities in South Africa; (4) to conduct a census of wine farms and estates regarding all their tourism-related infrastructure, superstructure and tourism products and experiences to determine the current state of wine tourism development in South Africa; (5) to determine the clustering of tourist-related facilities and number of wine nodes (critical mass) on the country's wine routes and position each route in terms of its phase in the tourism area life cycle; (6) to investigate the perceptions of visitors to Cape Town on their wine tourism experiences in the Western Cape as well as other South African wine regions; (7) to conduct a case study to deepen insights into the social contribution made by a single wine farm.

The research followed a mixed-methods approach comprising two questionnaire surveys and one desktop study. Data were captured, analysed and presented using Survey Monkey, SPSS, Excel and ArcGIS. The study identified three wine routes (Darling, Klein Karoo and Stanford) in the *Emerging* life cycle phase; ten routes (Bot River, Plettenberg Bay, Hermanus, Swartland, Worcester, Tulbagh, Bredekloof, Wellington, Namaqua West Coast and Constantia) in the lower development phase of *Acknowledgement*; four routes (Elgin, Durbanville, Paarl and Robertson) in the higher development phase of *Prestige*; and two routes (Franschhoek and Stellenbosch) in the *Maturity* life cycle phase. Stellenbosch Wine Routes was identified as the most developed wine route in South Africa with its five sub routes. According to the visitor survey, the majority of the visitors were found to plan a holiday around wine tourism activities and have a tendency to return to previously visited wine regions. The visitors regarded the beautiful and natural landscapes, good wine, restaurants and food as the main attractions of wine regions. The desktop study has revealed that the socio-economic contributions of

the wine tourism industry in South Africa are praiseworthy with wine route members contributing to and encouraging job creation, social development projects and programmes for their employees and their relatives as well as practicing environment-friendly farming. The wine tourism industry in South Africa contributes to the country's gross domestic products and assists regional development. The study confirmed that South Africa is a leading wine tourism destination, able to compete with the leading wine countries of the world.

Keywords: wine tourism development; global wine routes; tourism life cycle model; social responsibility; environment and wine; wine estate; wine holiday; landscapes and winescapes; environment-friendly production; biodiversity; wine tourism destination

OPSOMMING

Wyntoerisme is 'n vorm van spesiale-belang toerisme. Wyntoerisme groei en ontwikkel wêreldwyd en word beskou as 'n betekenisvolle drywer van ekonomiese en sosiale ontwikkeling in landelike gebiede. Suid-Afrika se wyntoerismebedryf het oor die laaste 40 jaar organies en spontaan ontwikkel. Die doel van hierdie studie was om die huidige stand van wyntoerisme in Suid-Afrika te ondersoek.

Die navorsingsdoelwitte was (1) 'n omvattende soektog na geskikte literatuur uit te voer oor die konsepte, teorieë en gevallestudies met betrekking tot wyntoerisme, wynroete ontwikkeling, streeksontwikkeling en sosiale verantwoordelikheid te raadpleeg; (2) om 'n kaart te maak wat die verspreiding van alle wyn druif produksie in Suid-Afrika illustreer; (3) om kaarte te maak wat die verspreiding van alle wynproduseerende plase wat betrokke is in wyntoerisme aktiwiteite in Suid-Afrika te illustreer; (4) 'n nasionale sensus uit te voer om die huidige stand van wyntoerisme te bepaal in terme van infrastruktuur, grootskaalse ontwikkeling en toerisme produkte en ervarings op elke wynproduserende plaas; (5) die konsentrasie van die aantal fasiliteite of fokuspunte (kritieke massa) op die land se verskillende wynroetes te bepaal en elke roete te posisioneer volgens sy lewensiklus fase; (6) om die gewaarwording van besoekers aan Kaapstad met betrekking tot hul wyntoerisme-ervaring in die Wes-Kaap, sowel as ander Suid-Afrikaanse wynstreke, te bepaal; (7) om 'n geskikte gevallestudie te doen om sodoende die analise met betrekking tot die sosiale bydrae van een wynplaas te verdiep.

Die navorsing het 'n gemengde-metodesbenadering gevolg bestaande uit twee vraelys opnames en een rekenaarstudie. Die inligting is vasgelê, ontleed en aangebied met behulp van Survey Monkey, SPSS, Excel en ArcGIS. Die studie het drie wynroetes (Darling, Klein Karoo en Stanford) geïdentifiseer in die *Opkomende* lewensiklusfase; tien wynroetes (Botrivier, Plettenbergbaai, Hermanus, Swartland, Worcester, Tulbagh, Bredekloof, Wellington, Namaqua Weskus en Constantia) in die laer ontwikkelingsfase, *Erkenning*; vier wynroetes (Elgin, Durbanville, Paarl en Robertson) in die hoër ontwikkelingsfase, *Toonaangewend*; en twee wynroetes (Franschhoek en Stellenbosch) in die lewensiklusfase van *Volwassenheid*. Die Stellenbosch-wynroete met sy vyf subroetes is as die mees ontwikkelde wynroete in Suid-Afrika geïdentifiseer. Volgens die besoeker vraelys het die meerderheid van die besoekers geneig om 'n vakansie rondom wyntoerisme-aktiwiteite te beplan en om terug te keer na wynstreke wat voorheen besoek is. Die besoekers beskou die pragtige en natuurlike landskappe, goeie wyn, restaurante en kos as die belangrikste trekpleisters van die wynstreke. Die

rekenaarstudie het bewys dat die sosiaal-ekonomiese bydraes van die wyntoerismebedryf in Suid-Afrika was pryserswaardig met die wynroetelede wat tot werkskepping bydra en sosiale ontwikkelingsprojekte en-programme vir hul werknemers en hul families aanmoedig, asook omgewingsvriendelike boerderypraktyke ondersteun. Die wyntoerismebedryf in Suid-Afrika maak `n bydrae tot die bruto binnelandse produk en help met streekontwikkeling. Die studie het bevestig dat Suid-Afrika `n leidende wyntoerisme-bestemming is wat met die voorste wynlande van die wêreld kan meeding.

Sleutelwoorde: wyntoerisme-ontwikkeling; globale wynroetes, toerisme-lewensiklusmodel; sosiale verantwoordelikheid; omgewing en wyn; wynlandgoed; wynvakansie; landskappe en wynskappe; omgewingsvriendelike produksie; biodiversiteit; wyntoerisme-bestemming

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CONTENTS

DECLARATION.....	ii
ABSTRACT.....	iii
OPSOMMING.....	v
ACKNOWLEDGEMENTS.....	vii
TABLES.....	xii
FIGURES.....	xiii
ACRONYMS AND ABBREVIATIONS.....	xvii
CHAPTER 1 INTRODUCTION.....	1
1.1 INTRODUCTION.....	1
1.2 ROLE OF ‘PLACE’ AND THE STUDY OF WINE TOURISM DEVELOPMENT.....	3
1.3 THE BIGGER CONTEXT: WINE-PRODUCING AREAS AND WINE ROUTES OF SOUTH AFRICA.....	6
1.4 OVERVIEW OF SOUTH AFRICA’S WINE ROUTES.....	9
1.5 THE REAL-WORLD PROBLEM.....	10
1.6 AIM AND OBJECTIVES.....	11
1.7 METHODOLOGY, METHODS AND MATERIALS.....	12
1.8 RESEARCH DESIGN.....	12
1.9 THESIS OUTLINE.....	14
CHAPTER 2 LITERATURE REVIEW: WINE TOURISM AROUND THE WORLD.....	15
2.1 INTRODUCTION.....	15
2.2 WINE TOURISM IN CONTEXT.....	17
2.2.1 Wine tourism within the broader tourism field.....	17
2.2.2 Wine tourism defined.....	20
2.2.3 Type of wine tourists.....	22
2.2.4 Role of the cellar door.....	26

2.2.5	Wine tasting experience	27
2.2.6	Seeking more than wine	28
2.3	WINE TOURISM GLOBALLY: OLD-WORLD vs NEW-WORLD	30
2.3.1	Old-World wine countries	31
2.3.2	New-World wine countries	33
2.3.3	The evolution of wine routes	34
2.3.4	Theoretical models applied to the development of wine routes	37
2.4	SOCIAL RESPONSIBILITY AND OTHER DEVELOPMENT IMPACTS	45
2.4.1	Positive and negative impacts of wine tourism in rural areas	46
2.4.2	Wider impacts of wine tourism development	48
2.5	WINE TOURISM IN SOUTH AFRICA: THE WIDER CONTEXT	49
2.5.1	History of the wine industry in South Africa	49
2.5.2	The peculiar geographical features of South Africa's wine regions	52
2.5.3	The history of wine routes in South Africa	55
2.6	CONCLUSION	58
CHAPTER 3 METHODOLOGY, METHODS AND MATERIALS		59
3.1	INTRODUCTION	59
3.2	MIXED-METHODS RESEARCH	59
3.3	STEPWISE APPROACH	59
3.4	THE QUESTIONNAIRE SURVEYS	60
3.4.1	Supply-side perspective: Questionnaire survey of wine farms (winery nodes)	60
3.4.2	Demand-side perspective: Visitor questionnaire survey	61
3.5	ASSESSMENT FRAMEWORK	62
3.6	CONCLUSION	66
CHAPTER 4 THE GEOGRAPHY OF WINE TOURISM IN SOUTH AFRICA		67
4.1	INTRODUCTION	67
4.2	APPLICATION OF ASSESMENT FRAMEWORK AT NODE LEVEL	68

4.2.1	Ultimate wine tourism experience versus the basic emerging experience	68
4.2.2	Level of development on node level	70
4.2.3	Location, historical and tourism context of South Africa's wine routes.....	71
4.3	CONCLUSION.....	177
CHAPTER 5 POSITIONING WINE ROUTES IN LIFE CYCLE PHASES		178
5.1	INTRODUCTION	178
5.2	THEORETICAL CONTEXT OF LIFE CYCLE PHASES	178
5.2.1	Phase 1: Emerging	178
5.2.2	Phase 2: Development (acknowledgement and prestige).....	179
5.2.3	Phase 3: Maturity	179
5.2.4	Phase 4: Stagnation	181
5.3	APPLICATION OF THE ASSESSMENT FRAMEWORK AT NETWORK LEVEL	181
5.4	CONCLUSION.....	184
CHAPTER 6 WINE TOURISM EXPERIENCES: TOURIST PERSPECTIVES		185
6.1	INTRODUCTION	185
6.2	VISITOR PERCEPTIONS	185
6.2.1	Demographic profile of participants	185
6.2.2	Results on wine regions	187
6.2.3	Economic value of tourists' trips, South Africa's wine tourism experience rating and sources of information	191
6.3	CONCLUSION.....	192
CHAPTER 7 THE WINE AND WINE TOURISM INDUSTRIES' ROLE IN SOCIAL AND ENVIRONMENTAL BEST PRACTICES.....		194
7.1	INTRODUCTION	194
7.2	THE WINE INDUSTRY'S ROLE IN EMPLOYMENT	194
7.2.1	Skills development programmes of South Africa's wine route members.....	196
7.3	SOCIAL AND ENVIRONMENTAL BEST PRACTICES.....	197

7.3.1	Conservation initiatives and environmental best practice in South Africa	197
7.3.2	Social best practices of South Africa’s wine route members	199
7.3.3	Case study: Solms-Delta	201
7.4	CONCLUSION	204
CHAPTER 8 CONCLUSION		205
8.1	REVISITING THE AIM AND OBJECTIVES	205
8.2	LIMITATIONS TO THE STUDY	211
8.3	IMPLICATIONS AND RECOMMENDATIONS	212
8.4	FINAL WORD	214
REFERENCES		216
APPENDICES		241
APPENDIX A: WINE FARM QUESTIONNAIRE SURVEY		241
APPENDIX B: VISITOR QUESTIONNAIRE SURVEY		244
APPENDIX C: COVERING LETTER		245
APPENDIX D: COMPLETE DEVELOPMENT SCORE LIST		247

TABLES

Table 1.1 Criteria for demarcation of areas of origin.	8
Table 2.1 Facilities, services and activities available at wineries	23
Table 2.2 Categories of wine tourists.....	24
Table 2.3 Explanation of the tourism life cycle model (TALC) by Butler (1980)	39
Table 2.4 The wine tourism life cycle model.....	44
Table 3.1 Weights assigned to tourism features of a wine farm or estate.....	63
Table 3.2 Weights assigned to capacity of facilities	64
Table 4.1 Development score of the top 20 winery nodes.....	70
Table 4.2 Summary of total wine route members and their participation in the study	72
Table 5.1 Scores attained by wine routes for assessing position in the life cycle model.....	182

FIGURES

Figure 1.1 Vineyards situated at different altitudes on mountain slopes in Stellenbosch.....	7
Figure 1.2 The winegrowing areas of South Africa.....	8
Figure 1.3 Distribution of wine grape vineyards (hectares) per wine region in South Africa	9
Figure 1.4 Research design for investigating the development of wine tourism in South Africa.....	13
Figure 2.1 Position of wine tourism in relation to other types of tourism	16
Figure 2.2 Types of special-interest tourism with food and wine tourism emphasised	19
Figure 2.3 Miossec’s time and space model of tourist resort evolution.....	38
Figure 2.4 Butler’s tourism area life cycle model.....	40
Figure 2.5 Wine industry stakeholders in South Africa.....	52
Figure 4.1 Wine farms and estates that participated in the survey of wine tourism	67
Figure 4.2 Example of wine tourism experiences.....	69
Figure 4.3 Members of the Darling Wine Route in the Coastal and Olifants River Region.....	74
Figure 4.4 Landscapes on the Darling Wine Route	75
Figure 4.5 Darling Wine Route: Number of farms with facilities and capacity of facilities	76
Figure 4.6 Darling Wine Route: Number of wine route members offering services	77
Figure 4.7 Seascapes in the Namaqua West Coast Wine Route	79
Figure 4.8 Distribution of member wineries in the Namaqua West Coast Wine Route in the Coastal and Olifants River Region	80
Figure 4.9 Namaqua West Coast Wine Route: Number of farms with facilities and capacity of facilities	81
Figure 4.10 Namaqua West Coast Wine Route: Number of wine route members offering services.....	82
Figure 4.11 Namaqua West Coast Wine Route: Visitor origins and stays	82
Figure 4.12 Swartland landscape and building on Org de Rac wine farm.....	84
Figure 4.13 Distribution of member wineries of the Santam Swartland Wine & Olive Route in the Coastal and Olifants River Region	86
Figure 4.14 Santam Swartland Wine & Olive Route: Number of farms with facilities and capacity of facilities.....	87
Figure 4.15 Santam Swartland Wine & Olive Route: Number of wine route farms offering services.....	88
Figure 4.16 Santam Swartland Wine & Olive Route: Visitor origins and stays.....	88
Figure 4.17 Landscapes in the Bredekloof Wine Route.....	90
Figure 4.18 Distribution of member wineries in the Bredekloof Wine Route in the Breede Valley Region	92
Figure 4.19 Bredekloof Wine Route: Number of farms with facilities and capacity of facilities.....	93
Figure 4.20 Bredekloof Wine Route: Number of wine route members offering services.....	93

Figure 4.21 Breedekloof Wine Route: Visitor origins and stays	94
Figure 4.22 Stellenbosch town and winescapes of the Stellenbosch Wine Route	95
Figure 4.23 Growth of the Stellenbosch Wine Routes, 1973 to 2016.....	98
Figure 4.24 Distribution of member wineries in the Stellenbosch Wine Routes in the Breede Valley Region	99
Figure 4.25 Stellenbosch Wine Routes: Number of farms with facilities and capacity of facilities.....	100
Figure 4.26 Stellenbosch Wine Routes: Number of wine route members offering services	101
Figure 4.27 Stellenbosch Wine Routes: Visitor origins and stays	101
Figure 4.28 Tourist facility and winescape on the Franschhoek Vignerons	104
Figure 4.29 Distribution of the member wineries on the Franschhoek Vignerons in the Breede Valley Region	105
Figure 4.30 Franschhoek Vignerons: Number of farms with facilities and capacity of facilities.....	106
Figure 4.31 Franschhoek Vignerons: Number of wine route members offering services	107
Figure 4.32 Franschhoek Vignerons: Visitor origins and stays	107
Figure 4.33 Winescapes and wine farm of the Paarl Wine Route.....	110
Figure 4.34 Distribution of member wineries in the Paarl Valley Wine Route in the Breede Valley Region	111
Figure 4.35 Paarl Valley Wine Route: Number of farms with facilities and capacity of facilities.....	112
Figure 4.36 Paarl Valley Wine Route: Number of wine route members offering services	113
Figure 4.37 Paarl Valley Wine Route: Visitor origins and stays	113
Figure 4.38 Receptionscape and winescape on the Robertson Wine Route	116
Figure 4.39 Distribution of the member wineries on the Robertson Wine Route in the Breede Valley Region	117
Figure 4.40 Robertson Wine Route: Number of farms with facilities and capacity of facilities	118
Figure 4.41 Robertson Wine Route: Number of services	118
Figure 4.42 Robertson Wine Route: Visitor origins and stays.....	119
Figure 4.43 Tulbagh town and landscapes.....	121
Figure 4.44 Distribution of member wineries on the Tulbagh Wine Route in the Breede Valley Region	122
Figure 4.45 Tulbagh Wine Route: Number of farms with facilities and capacity of facilities	123
Figure 4.46 Tulbagh Wine Route: Number of wine route members offering services	123
Figure 4.47 Tulbagh Wine Route: Visitor origins and stays.....	124
Figure 4.48 Land-and winescape on the Wellington Wine Route	126
Figure 4.49 Distribution of Wellington Wine Route members in the Breede Valley Region	127
Figure 4.50 Wellington Wine Route: Number of farms with facilities and capacity of facilities.....	128

Figure 4.51 Wellington Wine Route: Number of wine route members offering services	128
Figure 4.52 Wellington Wine Route: Visitor origins and stays	129
Figure 4.53 Distribution of member wineries on the Worcester Wine & Olive Route in the Breede Valley Region.....	130
Figure 4.54 Worcester Wine & Olive Route cellar and landscape	131
Figure 4.55 Worcester Wine & Olive Route: Number of farms with facilities and capacity of facilities	132
Figure 4.56 Worcester Wine & Olive Route: Number of wine route members offering services	133
Figure 4.57 Worcester Wine & Olive Route: Visitor origins and stays.....	134
Figure 4.58 Landscape and barrels in a wine-tasting cellar on the Bot River Wine Route	137
Figure 4.59 Distribution of the member wineries of the Bot River Wine Route in the Cape South Coast Region.....	138
Figure 4.60 Bot River Wine route: Number of farms with facilities and capacity of facilities	139
Figure 4.61 Bot River Wine Route: Number of wine route members offering services.....	139
Figure 4.62 Bot River Wine Route: Visitor origins and stays	140
Figure 4.63 Winescapes in the Elgin Valley Wine Route.....	142
Figure 4.64 Distribution of member wineries in the Elgin Valley Wine Route in the Cape South Coast Region.....	143
Figure 4.65 Elgin Valley Wine Route: Number of farms with facilities and capacity of facilities	144
Figure 4.66 Elgin Valley Wine Route: Number of wine route members offering services	144
Figure 4.67 Elgin Valley Wine Route: Visitor origins and stays.....	145
Figure 4.68 Aerial view of the landscape on the Hermanus Wine Route	146
Figure 4.69 Distribution of members of the Hermanus Wine Route in the Cape South Coast Region	148
Figure 4.70 Hermanus Wine Route: Number of farms with facilities and capacity of facilities	149
Figure 4.71 Hermanus Wine Route: Number of wine route members offering services.....	150
Figure 4.72 Hermanus Wine Route: Visitor origins and stays.....	150
Figure 4.73 Distribution of the member wineries of the Stanford Wine Route in the Cape South Coast Region.....	152
Figure 4.74 The ‘Victorian village’ of Stanford	153
Figure 4.75 Stanford Wine Route: Number of farms with facilities and capacity of facilities.....	154
Figure 4.76 Stanford Wine Route: Number of wine route members offering services.....	155
Figure 4.77 Stanford Wine Route: Visitor origins and stays	155
Figure 4.78 Wine farms on the Plettenberg Bay Wine Route.....	157
Figure 4.79 Distribution of member wineries on the Plettenberg Bay Wine Route in the Klein Karoo Region.	158

Figure 4.80 Plettenberg bay Wine Route: Number of farms with facilities and capacity of facilities.....	159
Figure 4.81 Plettenberg Bay Wine Route: Number of wine route members offering services.....	160
Figure 4.82 Plettenberg Bay Wine Route: Visitor origins and stays	160
Figure 4.83 Members of the Darling Wine Route in the Coastal and Olifants River Region.....	162
Figure 4.84 Landscape in the Klein Karoo	163
Figure 4.85 Klein Karoo Wine Route: Number of farms with facilities and capacity of facilities.....	164
Figure 4.86 Klein Karoo: Number of wine route members offering services.....	165
Figure 4.87 Klein Karoo Wine Route: Visitor origins and stays	166
Figure 4.88 Winescape along the Constantia Wine Route.....	168
Figure 4.89 The distribution of member wineries in the Constantia Wine Route in the Cape Peninsula.	169
Figure 4.90 Constantia Wine Route: Number of farms with facilities and capacity of facilities	170
Figure 4.91 Constantia Wine Route: Number of wine route members offering services	170
Figure 4.92 Constantia Wine Route: Visitor origins and stays.....	171
Figure 4.93 View from Durbanville Hills on the Durbanville Wine Route.....	173
Figure 4.94 Distribution of member wineries in the Durbanville Wine Route in the Cape Town Metropolitan area.....	174
Figure 4.95 Durbanville Wine Route: Number of farms with facilities and capacity of facilities	175
Figure 4.96 Durbanville Wine Route: Number of wine route members offering services	176
Figure 4.97 Durbanville Wine Route: Visitor origins and stays.....	176
Figure 5.1 Life cycle phases of South Africa’s wine routes	183
Figure 6.1 Age of participating tourists	186
Figure 6.2 Country of origin of participating tourists	186
Figure 6.3 Number of nights spent on overnight stays in the Western Cape.....	187
Figure 6.4 Wine regions visited by survey participants.....	188
Figure 6.5 Likelihood of arranging wine tourism holidays and returning to previously visited wine regions	189
Figure 6.6 South Africa’s most favourite wine routes among tourists.....	189
Figure 6.7 Most favoured features of wine regions in South Africa.....	190
Figure 6.8 Activities undertaken by wine tourists	191
Figure 6.9 Respondents’ sources of information about wine tourism.....	192
Figure 7.1 Permanent and casual employment on participating wine route member farms in 2015	195
Figure 7.2 Employment within the different tourism sections.....	196
Figure 7.3 Employee housing on Solms-Delta	201
Figure 7.4 Solms-Delta employees dancing during the Oesfees.....	203

ACRONYMS AND ABBREVIATIONS

ATKV	Afrikaans Language and Culture Association (Afrikaanse Taal en Kultuurvereniging)
AO	appellations of origin
A\$	Australian dollars
B & B	bed and breakfast
BRC	British Retail Consortium
BWI	The Biodiversity and Wine Initiative
CSR	corporate social responsibility
CFR	cape floral region
DOC	designations of origin of wine
Dos	denominations of origin
EU	European Union
GDP	gross domestic product
GIs	geographical indications
GPS	global positioning system
HACCP	hazard analysis and critical control points
IGOs	indications of geographical origin
IPW	integrated production of wine
km	kilometres
KKNK	Klein Karoo National Arts Festival (Klein Karoo Nasionale Kunstefees)
KWV	Koöperatiewe Wijnbouwers-Vereniging
m	metres
mm	millimetres

MTB	mountain biking
RSA	Republic of South Africa
SAWIS	South African Wine Industry Information and Systems
SIT	Special-interest tourism
SKOP	Afrikaans for cellar-worker training programme
SPSS	statistical package for the social sciences
SWR	Stellenbosch Wine Routes
SWSA	Sustainable Wine South Africa
SAWRF	South African Wine Routes Forum
TALC	tourism area life cycle
US\$	United States dollar(s)
UK	United Kingdom
USA	United States of America
UNWTO	United Nations World Tourism Organisation
WIETA	Wine and Agricultural Ethical Trade Association
WISE	Wine industry strategic exercise
WTTC	World Travel and Tourism Council
WO	wine of origin
WOSA	Wines of South Africa
WSB	Wine and Spirit Board
WWF	World Wide Fund for Nature
ZAR	South African Rand

CHAPTER 1 INTRODUCTION

1.1 INTRODUCTION

The term tourism geography is a term that includes two very distinct fields of endeavor: tourism and geography (Chabot 1964; Williams & Lew 2015). Tourism is typically a complex concept involving not just the momentary movement of people to destinations detached from their normal places of residence but, in addition, the organisation and behaviour of their travel activities and of the travel facilities and services necessary to meet tourists' needs (Tribe 2009; Nelson 2013). Tourism necessitates significant support in terms of infrastructure for transport, accommodations, marketing systems, entertainment and attractions that collectively form the basis of tourism industries (Gunn 1994). Tourism occurs both between and within countries and it involves overnight visitors as well as day visitors (Theobald 2005; Tribe 2009; Williams & Lew 2015). Since the creation of the commercial airline industry, tourism has grown significantly to become the world's largest employer, with 284 million jobs globally in 2015 (Theobald 2005; WTTC 2011, 2016; Nelson 2013). In 2015 alone the annual number of international tourists increased by 4.6% to 1.2 million (Williams 2009; UNWTO 2016).

The connections between tourism and geography are related to specific terms like location, place, space, scale, accessibility and others (Williams 2009; Nelson 2013). There is an obvious link between the two fields in that the primary feature which attracts tourists to a certain area is the geography of that area. Thus, tourism is essentially based on the movements of people across space and their interactions with place (Fairhurst et al. 2003; Williams 2009; Nelson 2013). Tourism geography has an integrative character comprising essentials from other subdisciplines of geography- human, physical and economic. Tourism geography includes, among others, the tourist resources (natural or man-made), tourism infrastructure (transportation, venues, accommodation), the various types and forms of tourism, tourist circulation (numbers and trends) and tourist markets. Tourism is highly geographical because its dimensions include human-environment interactions and landscape; conservation and management of places and environments; environmental perceptions and sense of place; and spatial behaviour and human mobility (Williams 2009; Nelson 2013; Williams & Lew 2015).

While visiting a certain place, tourists actively discover and appreciate the geography of the place, from the landscapes with their typical forms to the traditions of the local population, while benefiting the local economy and using its resources. Part of the contemporary significance of tourism arises from the sheer scale of international travel and the rapidity with which it has developed. International tourist trips (at least one night) passed the one billion mark in 2012 in a phenomenal and seemingly unstoppable rise from less than 25 million such trips worldwide at the end of the Second World War (Williams 2009; Williams & Lew 2015, UNWTO 2016). Projections show a further 4% growth in tourist numbers in 2016. The World Travel and Tourism Council's (WTTC) latest report has indicated that travel and tourism's contribution to the world gross domestic product (GDP) has grown to 9.8% (US\$7.2 trillion) (WTTC 2015).

Contrarily, tourism that is not well managed can have various detrimental impacts on the physical environments where tourists visit. These include air and water pollution, increased traffic congestion, physical erosion of sites, disruption of habitats, species declines and unsightly visual blight caused by poorly planned or designed buildings (Theobald 2005; Williams 2009). The display of local cultures and customs to tourists can be a means of sustaining traditions and rituals, but it may also be a potent agency for cultural change, erosion of distinctive beliefs, values and practices, and the local adoption of globalised mass forms of culture. Modern tourism creates a broad agenda for investigation to which geographers can contribute, especially because the nature of tourism's effects is so often reliant upon the geographical contexts in which tourism is developed and practiced. The spaces and places in which tourism occurs are fundamental to tourist experiences; space and place being core interests of human geographers (Williams & Lew 2015).

This dissertation aims to determine the nature and extent of wine tourism development in South Africa by examining all the wineries that are members of wine tourist routes and the phase each wine route has reached in its life cycle. This introductory chapter begins by discussing the context of two fields related to wine tourism; namely tourism and geography. This is followed by sketching a background regarding the study area. The real-world problem, the aim, objectives, methodology and methods are formulated and discussed.

1.2 ROLE OF ‘PLACE’ AND THE STUDY OF WINE TOURISM DEVELOPMENT

Geography is an appropriate discipline for analysing the ways places might be defined. Regional geography has always been part of the discipline’s *raison d’être* (reason for being or existence) through the study of specific social, economic, cultural and environmental characteristics that collectively constitute distinctive regions (Williams 2009; Nelson 2013).

There is now a commonly accepted view that space is no longer seen as some objective entity that can only be defined empirically, it is rather the product of social constructions. Different cultures and societies define place and space in different ways. Lefebvre (1991) has suggested that places were constructed through the ideas and visualisations of people themselves. Such ideas were ‘fluid concepts’ moulded and shaped by different histories, cultures, worldviews, languages and economic requirements (Murray & Overton 2011). Place and space both constitute spatial social relations that set down new geographies and work to reshape cultural and social identities. Geographers understand how places should be seen as unrestrained, contested and permeable. However, there is still tension with social processes which seek to define places in specific ways that will “place boundaries around them in order to promote social identity, cohesion and sense of belonging as well as economic accumulation” (Murray & Overton 2011: 420). Place images and place-based marketing initiatives are specifically significant for wine tourism regions. This is because of the dependence of both the tourism and wine industries on a shared reputation grounded on places to market their products. Successful destination images create an ‘imprint’ on the minds of the consumers: an essentially creative and distinctive image of what constitutes the brand (Dawson, Fountain & Cohen 2011). A brand is an individual conception of a product held in the minds of potential consumers. A destination image is developed by applying branding principles to geographical locations (Morgan, Pritchard & Pride 2002).

Tourism and agriculture are two industries in which place image plays a fundamental role. Seen in the context of tourism, tourists are the consumers and destinations boast a variety of tourism products. A destination needs an identity or brand image¹ to be successful in the market place. A brand image should sum up the essence of the physical qualities, people, cultures, landscapes and the vibrancy of

¹ A destination image refers to the overall impression of a product held by current or potential consumers.

an area for potential visitors (Garrod, Wornell & Youell 2006). Agriculture, again, places importance on the link between the products and the place where they are produced. Thus, place image always plays a role in marketing these products and in consumers' receptiveness toward them (Papadopoulos 2004). The naming of places and the value of a place have become part of the economic landscape of certain industries (including fruit, meat, wine, dairy products) (Hayward & Lewis 2008). For the wine industry, the specific location and space where the wine is produced are fundamental and essential components of wine marketing initiatives and efforts so providing a reason for consumers to buy the products (Marshall 2007). Wine markets in the developed world are characterised by an excess of wine brands (Bruwer 2004) to the extent that consumers are apt to be overwhelmed by the sheer complexity of the buying situation this creates. Globalisation of the wine market has increased the complexity of decision making facing consumers. By emphasising region of origin, place-based marketing contributes to a strategy of product differentiation (Bruwer 2010). In doing so, it also simplifies purchasing decision by consumers as they can better relate to the product.

Place is important so that geographers invested in understanding the historical context of a specific area which is vital to winery businesses. Wine is probably the most culturally symbolic and historically connected component of our regular consumption of food and beverages (Alonso & Northcote 2008). Worldwide, vineyards have been part of local landscapes for generations, even centuries (Bruwer 2004). According to Banks et al. (2007) time incorporates vineyards into a region's traditions and culture, so gradually becoming place references. In this way the authentic nature of wines helps to identify a region where specific wines are produced. The establishment of various descriptions, such as appellations of origin (AO), denominations of origin (Dos), geographical indications (GIs) and indications geographical origin (IGOs), has had significant impacts for regions that capitalise on their wine heritage (Dawson, Fountain & Cohen 2011). These measures play a critical role in improving wine-making practices, identifying a region with a product, protecting local wines and other products and ultimately raising the profile of the product and the region. The question arises how regions that lack a tradition and cultural background in wine-making overcome the absence of "established traditions that lend themselves to regional branding?" (Alonso & Northcote 2008: 1249). There are areas where the historical and cultural backgrounds of new wine regions are created in non-traditional ways to produce an identity to market the wines of the region. Examples that come to mind are Argentina, Australia, California, Chile, New Zealand and Uruguay.

The international wine industry is characterised by the involvement of capital as well as two contradictory processes of globalisation and localisation. Within this multifaceted industry, two opposite models of production are evident. First, wine is a global commodity, cheap and readily available form of alcohol produced in bulk and shipped to numerous markets all over the world. This component accounts for a large share of the total volume of production (Dawson, Fountain & Cohen 2011). Second, wine can have a high-value, be expensive and produce smaller volumes by means of artisanal methods where established and well-known brands distinguish bottles of wine by virtue of their supposed vintage, variety, reputation, quality and origin (Dawson, Fountain & Cohen 2011; Murray & Overton 2011). The place of origin is a key dimension of this differentiation.

Coupled to the importance of place is the concept of ‘terroir’ which is essential in the wine industry. Many in the wine industry accept the notion that a particular place and its terroir (combination of slope, climate, aspect, soils and traditions in the cultivation of wine grapes and practices in wine-making) produces wine unique to that place. The concept of terroir originated from France (Old-World wine country), but it is applicable to all wine-producing areas of the world. Terroir has been adopted globally by many producers of wine who construct and reproduce narratives about the distinctive characteristics of particular regions. According to Banks et al. (2007) much of the culture of drinking wine, especially wine that is expensive, is associated with knowledge of place. To some extent, the essence or heart of a place is said to be found in a bottle of wine. To some the ability to correctly distinguish the origin of wine through a blind tasting is a mark of skill, whereas for others the ability to afford an expensive wine of origin is a mark of economic status. This latter form of consumption, derived from the concept of terroir, modifies and reproduces the constructions of places in the world of wine (Dawson, Fountain & Cohen 2011; Murray & Overton 2011). It is clear that place branding and place of origin are two notions that are important for wine tourism and even more so for the wine industry. This confirms the link between the fields of tourism and geography as embodied in tourism geography. Consumers often link a place or region to a specific product, in this case wine and place of origin.

The next two sections address the South African wine region and wine route contexts of the research.

1.3 THE LARGER CONTEXT: WINE-PRODUCING AREAS AND WINE ROUTES OF SOUTH AFRICA

South Africa is the farthest south of Africa's countries, with the Cape winelands located at the tip of the continent. Viticulture in South Africa originated and mainly takes place between latitudes 27° and 34° south in an area with a Mediterranean climate (SAWIS 2016; WOSA 2016). The Western Cape with its cool conditions is ideal for growing a wide range of noble wine varieties. The coastal zone is the traditional winegrowing area, rarely farther than 50 km from the ocean, where beneficial coastal conditions, particularly cool sea breezes are experienced (Bonnardot 2002; Swanepoel & Bailey 2008). Most of the winegrowing areas in the Cape are influenced by, the Atlantic and the Indian Oceans which meet at the tip of Africa (WOSA 2016). The characteristic and diverse topography, the miscellaneous soils, the regular coastal fog, cooling sea breezes and the moderate Mediterranean climate create ideal conditions for creating wines of exceptional character and complexity (SAWIS 2016). The Cape winelands stretch from the rocky mountains and multidirectional slopes of the coastal region to the open plains of the Klein Karoo. Ninety-five per cent of South Africa's vineyards are located near the coast in the Western Cape (Bruwer 2003; Swanepoel & Bailey 2008). Rainfall in the coastal areas, characterised by indigenous vegetation, measures up to 1000 mm annually. The Cape's vineyards have been established in a wide variety of locations where they embrace valley grounds, crawl up hills, ascend steep mountain slopes or lie tucked below high peaks. The diverse topography offers a wide range of locations with many different mesoclimates² and soils that favour various grape varieties (Hunter, Archer & Volschenk 2010; Hunter & Bonnardot 2011; Dougherty 2012; WOSA 2016). Differences in microclimates and soils provide the terroir for more than 100 appellations currently in existence (Mouton 2006; Platter 2016). The soils in these appellations tend to be degraded sandstone, granite and shale mixed in different proportions with clay, depending on location.

²Mesoclimates are climates at an intermediate geographic scale, such as a downtown district, neighbourhood, large park, farm, vineyard or wooded area (Extension 2013)

With increased knowledge gained about vineyard requirements, many growers have extended their plantings to areas where vineyards benefit from improved drainage and cooler conditions. Some vineyards are situated a mere 50 m above sea level and others at 600 m in the mountains. On a single farm, great difference in height above sea level can be found between the lowest-lying altitude vineyards and the highest. Differences in altitude are frequently used to distinguish between styles for the same variety or to plant several varieties having different climatic requirements on the same farm (Dougherty 2012; WOSA 2016). Figure 1.1 shows vineyards that are situated at different altitudes.



Source: Siyabona Africa 2016

Figure 1.1 Vineyards situated at different altitudes on mountain slopes in Stellenbosch

In 2015, 98 600 hectares of vines covered South Africa over an area stretching some 800 km (Aspect 2015, WOSA 2016). The Wine of Origin (WO) scheme which originated in 1973 divides the production zones of the Cape Winelands into officially demarcated regions, districts and wards. The Western Cape comprises six wine regions, namely Breede River Valley, Cape South Coast, Coastal Region, Klein Karoo, Olifants River and Boberg (the latter for use in respect of fortified wines from Paarl, Franschhoek, Wellington and Tulbagh) which include 26 districts and approximately 69 wards. Another four geographical units also exist, namely KwaZulu-Natal; Northern Cape (comprising the

production areas Hartswater (ward), Douglas (district), Central Orange River (ward), Rietrivier Free State (ward) and Sutherland Karoo (district)); Eastern Cape, which includes the production area St Francis Bay (ward); and Limpopo (Swanepoel & Bailey 2008; WOSA 2016). Table 1.1 shows the criteria for demarcation of areas of origin.

Table 1.1 Criteria for demarcation of areas of origin.

Ward	District	Region	Geographical unit
A ward is defined by taking the soil, climate and environmental factors into consideration as they have a significant impact on the character of wines. The proposed area name has to be the real geographical place name. Nature has to dictate that the particular area can produce wines with a distinctive character.	Districts have the same criteria as wards, however it has to consider the relevant area using macro geographical characteristics, namely mountains and rivers. A greater diversity of soil types is also allowed than in the wards.	Regions are primarily demarcated according to the encompassing area name. In the case of a river this will stretch from the source to the mouth thereof. When considering an estate (one or two farms), it must be accepted that the natural factors can vary but it is distinctive since in most cases there is only one producer and the farms are run as a unit.	The Wine of Origin Scheme amended the provision for defining a geographical unit , on 2 April 1993. Currently, there are five geographical units including Western Cape, Northern Cape, KwaZulu-Natal, Limpopo and Eastern Cape.

Source: Aspect (2015)

Figure 1.2 Illustrates the winegrowing areas of South Africa (excluding Limpopo).

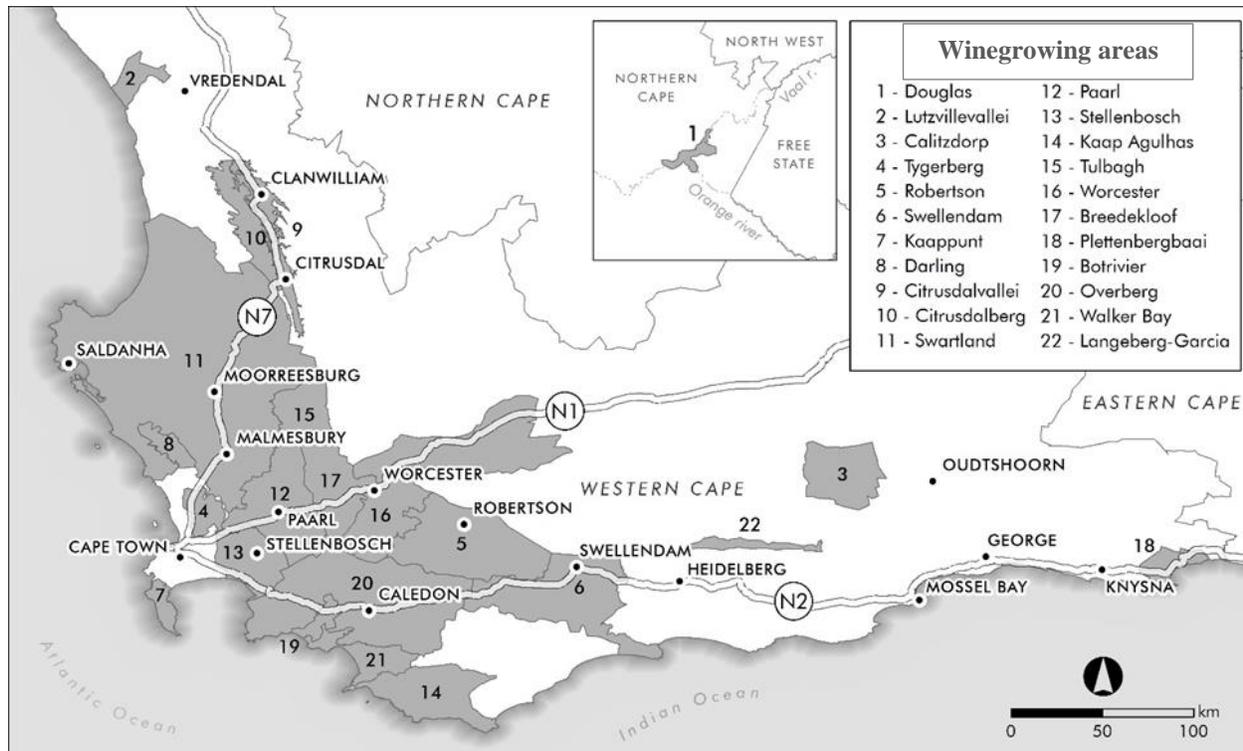
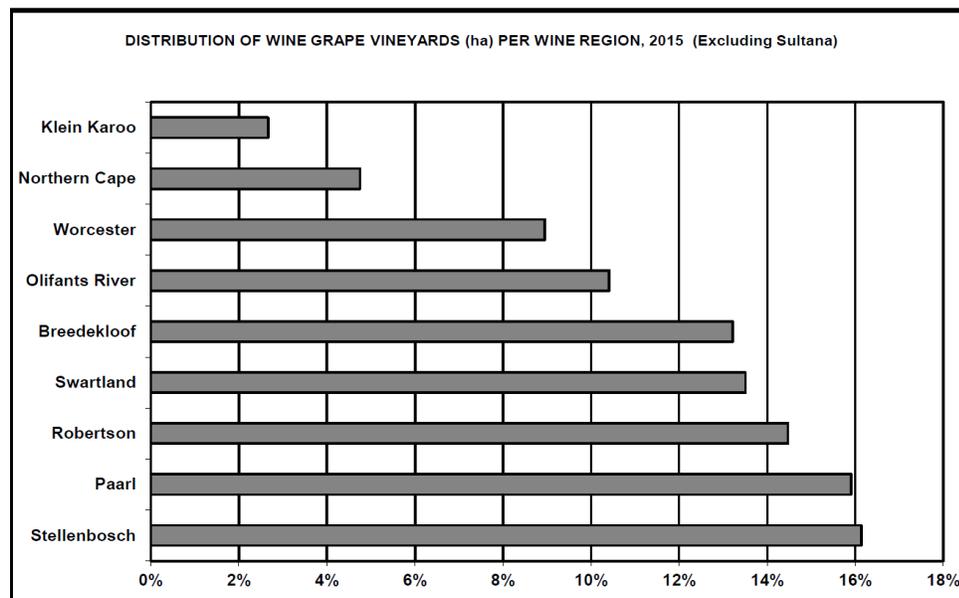


Figure 1.2 The winegrowing areas of South Africa

Figure 1.3 shows the geographical distribution of South Africa's wine grape vineyards (hectares under production) per region in 2015.



Source: SAWIS (2016: 8)

Figure 1.3 Distribution of wine grape vineyards (hectares) per wine region in South Africa

In 2016 the Stellenbosch Wine Region had the greatest share of vines (16.5%), followed by Paarl (16.1%) and Robertson (16.5%) (SAWIS 2016). The next section takes a brief look at the diverse wine routes of South Africa.

1.4 OVERVIEW OF SOUTH AFRICA'S WINE ROUTES

This study centres on more than 300 wineries situated on 21 well-organised wine routes of South Africa in the Coastal and Olifants River, Breede Valley, Cape South Coast, Klein Karoo and Great Karoo wine regions. Wine routes are defined in this study as a tourist route that ties several wine farms or estates in a particular area. Wine routes such as Darling, Durbanville, Constantia, Stellenbosch, Paarl, Franschhoek, Wellington and the Walker Bay area are located within an hour's drive from Cape Town. The Breedekloof, Worcester, Robertson, Klein Karoo, Tulbagh, Swartland, Olifants River and Northern Cape wine routes are reached from Cape Town by a somewhat longer journey (WOSA 2016).

Apart from offering wine tasting and cellar door sales wine farms and estates now offer first-class hotels, restaurants, accommodation, spas, game lodges and golf courses, with a wide variety of activities ranging from horseback trails to mountain biking and hiking. Many of the Western Cape's

historic wine farms and towns are characterised by the charming Cape Dutch architecture which flourished during the 18th and 19th centuries (WOSA 2016). Each wine route is discussed separately in more detail in Chapter 4. The next section turns to the formulation of the research problem.

1.5 THE REAL-WORLD PROBLEM

The diversification of rural economies should centre on the potential for endogenous development and seek to find structural solutions to the difficulties of setting up secondary and tertiary sector economic activities (Gatti & Incerti 1997: 218). Tourism in rural areas has progressed from being a primarily passive and minor element of rural landscapes to a vigorously active and dominant agent of change and control of these very landscapes and their rural communities (Butler, Hall & Jenkins 1998; Rogerson 2007; Saarinen & Rogerson 2014). The development of wine tourism in various wine-producing areas of the world has and continues to play an important role in the diversification of rural economies (Hall 2002; Ritter & Virag 2016). People visiting wineries for recreational purposes can serve as distribution channels of consumers into specific regions (Wargenau & Che 2006). Wine-related tourism activities can benefit destinations by attracting visitors in pre- and post-peak travel seasons so contributing to steady incomes and jobs in rural areas (Getz 2000).

Limited job opportunities and unemployment are realities in most rural areas, especially in South Africa. Between 1994 and 2014 the unemployment rate in South Africa increased from 22% to 25%. In 2015 there were roughly 5.7 million unemployed people in South Africa. The largest losses during 2015 in employment were reported in mining (-5%), agriculture (-5%), transport (-4.4%) and community and social services (-3.5%) (SAWIS 2015). The South African government has set goals of eradicating poverty, reducing inequality, growing the economy by an average of 5.4% and cutting the unemployment rate to 6% by 2030 (SAWIS 2015). To attain these goals, it is critical to focus on education, training and innovation (SAWIS 2015).

A 2015 SAWIS report has confirmed that South Africa's wine industry not only continues to increase its contribution to the country's GDP, but the industry is also continuously increasing its number of job opportunities (SAWIS 2015). This is despite the impact of a subdued global economy and a small decrease in the size of the national vineyard. The wine industry remains one of South Africa's leading agri-exporters and accounted for 1.2% of the national GDP in 2013. It has been reported that in 2015 the wine industry contributed R36.1 billion to the economy (including wine tourism) by means of agriculture, manufacturing, trade and hospitality, while generating close to 300 000 direct and indirect

job opportunities, including farm labourers and those involved in packaging, retailing and wine tourism. These jobs involve 56% unskilled workers, 29% semi-skilled workers and 15% skilled workers. Some 58% of the 300 000 job opportunities were in the Western Cape. Starting at wine farm level, the initial value of the raw materials in terms of income created, amounted to R3.4 billion ultimately leading to a GDP value of R21.7 billion, excluding tourism (SAWIS 2015; WOSA 2016). Wine tourism is one of the fastest-growing and most lucrative sectors of the global tourism market and it is considered to be a significant driver of economic and social development in rural areas (Ferreira & Muller 2013). In 2009 wine tourism contributed an estimated R4.3 billion to South Africa's tourism revenue and by 2013 this had increased to R6 billion. These noteworthy contributions confirm the industry's importance in the Western Cape as a creator of employment opportunities at various levels, from vineyard labourers to role players involved in the tourist industry (SAWIS 2015).

After more than 40 years of involvement and development of wine tourism in South Africa - mostly driven by the wine routes (private route members) – it is now important to investigate the state of wine tourism development in South Africa.

1.6 AIM AND OBJECTIVES

The aim of this study was to determine and analyse the nature and extent of the development of wine tourism in South Africa in 2015. To realise this aim, the following seven objectives were set:

1. Undertake a comprehensive search for appropriate literature and review the concepts, theories and case studies related to wine tourism, wine route development, regional economic development and social responsibility on farm level.
2. To visualise the distribution of all wine grape-producing farms in South Africa.
3. To show the distribution of all wine grape-producing farms involved in wine tourism activities in South Africa.
4. Conduct a census of wine farms and estates regarding all their tourism-related infrastructure, superstructure, products and experiences to determine the current state of wine tourism development in South Africa.
5. Determine the clustering of tourist-related facilities and number of wine nodes (critical mass) on the country's wine routes and position each route in terms of its phase in the tourism area life cycle.
6. Investigate the perceptions of visitors to Cape Town on their wine tourism experiences in the Western Cape as well as other South African wine regions.

7. Conduct a case study to deepen insights into the social contribution made by a single wine farm.

The following section very briefly mentions the methodological stance and methods employed in the research.

1.7 METHODOLOGY, METHODS AND MATERIALS

This research followed a mixed-methods approach using questionnaire surveys that included open-ended and closed-ended questions so producing both descriptive and measurable information. The first survey was the primary instrument to collect data from a supply side perspective from wineries on South Africa's wine routes. The most knowledgeable person or owner of the wine farm or estate completed the questionnaire. The second survey comprised five-hundred visitors to Cape Town to determine their perceptions regarding the wine tourism experience on offer. Last, a desktop search was conducted about one of the leading wine farms regarding their socio-economic contribution to enhance the work and living conditions of employees. Maps were created in ArcMap 10.0. The methodological framework for the research and the methods used for data collection and analysis are discussed in more detail in Chapter 3. Ethical clearance was obtained from the ethical committee of Stellenbosch University which found that the study did not invade any sensitivities of the participants. All the questions asked in the questionnaires were optional. The next section covers the research design.

1.8 RESEARCH DESIGN

A research design is “the overall strategy that you choose to integrate the different components of the study in a coherent and logical way, thereby, ensuring you will effectively address the research problem; it constitutes the blueprint for the collection, measurement, and analysis of data” (De Vaus 2001: 8). Figure 1.4 demonstrates the research design for the study that was completed in four phases. First, the research problem was identified. This led to identifying the aim and seven objectives. Phase 2 consisted of identifying methods for the research as well as developing research instruments for data collection (questionnaire surveys). Phase 3 comprised capturing, displaying and analysing the data by using SPSS, Survey Monkey and Microsoft Excel software. Furthermore, information from the questionnaires was analysed, discussed and synthesised in Phase 4 during which the aim and objectives were reviewed, the main findings summarised and recommendations made. The conceptual basis of the study was laid by a review of literature on the development of wine tourism and wine routes globally and in South Africa and the literature was taken into account continuously during the research.

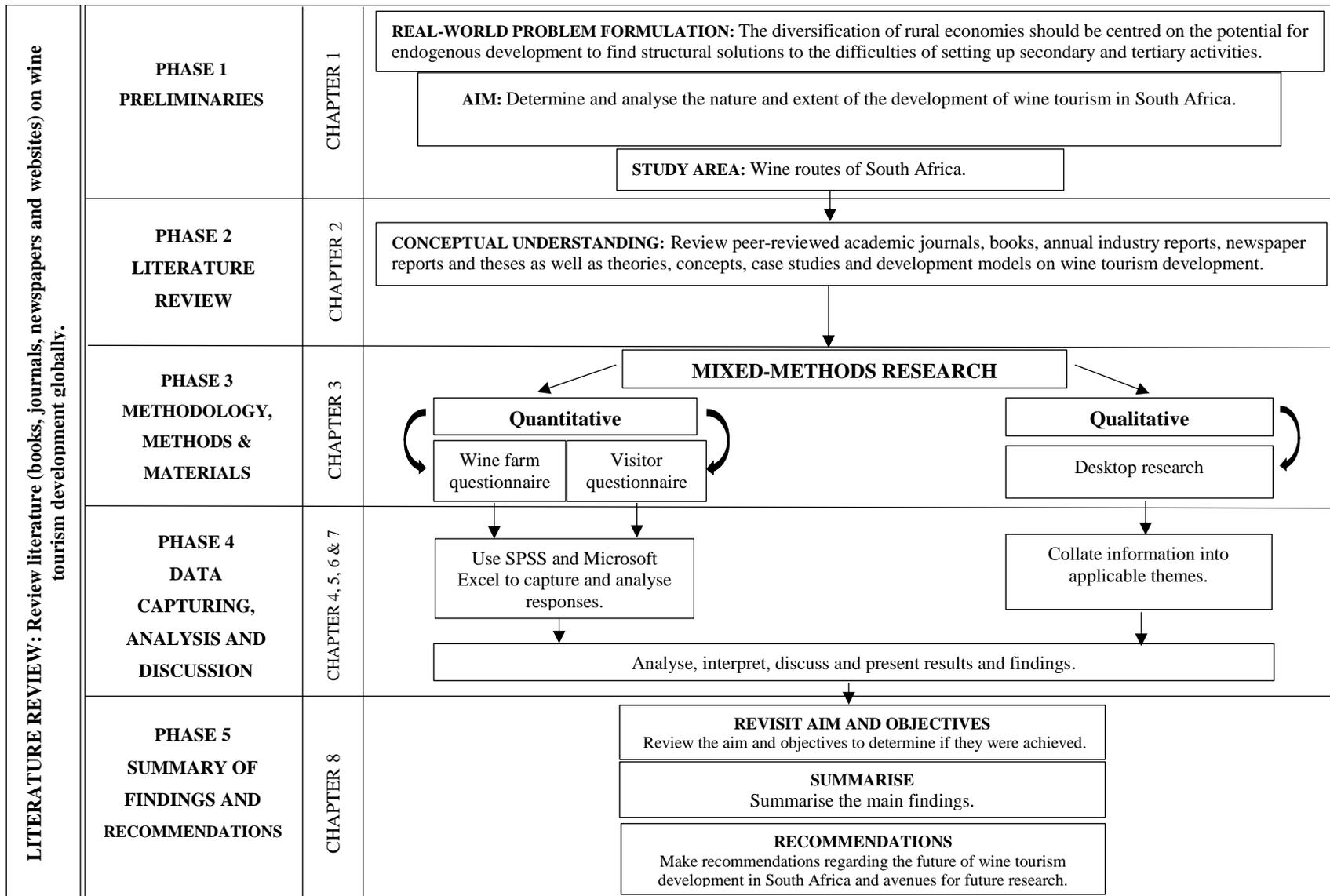


Figure 1.4 Research design for investigating the development of wine tourism in South Africa

1.9 THESIS OUTLINE

Chapter 1 laid the foundation of the study and highlighted the importance and context of the research. The chapter presented the study area as well as the rudiments of the research, namely the real-world problem, the overarching aim, the objectives and the position of the study within the broader fields of tourism and geography. Chapter 2 builds the theoretical foundation by reviewing the appropriate literature. Chapter 3 gives an extensive description of the methodology, methods and the materials employed to fulfil the aim of the study. Chapter 4 visually portrays the data in graphs, diagrams and maps and discusses the findings and results regarding the state of development on node level of 19³ wine routes in South Africa. Chapter 5 reports on the positioning of wine routes in life cycle phases. Chapter 6 provides a snapshot view into the perceptions and expectations of visitors to Cape Town regarding South Africa's wine regions. Chapter 7 deals with the social contribution of one wine farm towards improving the lives and circumstances of the employees and their families. In Chapter 8 the main findings are summarised, conclusions are drawn and recommendations are made about future research possibilities.

³ South Africa has 21 wine routes, however only 19 routes will be discussed (excluding Elim Wine Growers and the Orange River Wine Route). The response from these two wine routes were too low for meaningful analyses.

CHAPTER 2 LITERATURE REVIEW: WINE TOURISM AROUND THE WORLD

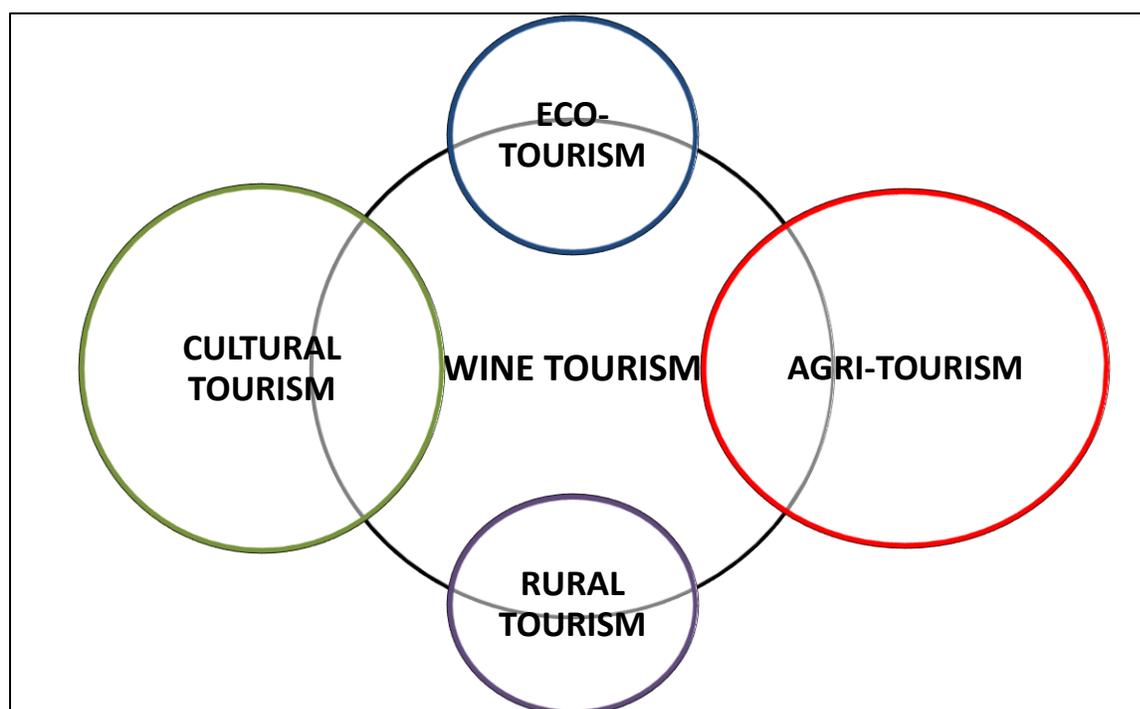
2.1 INTRODUCTION

Wine tourism is a form of special-interest tourism (Bruwer 2003). The classic definition of wine tourism was given by Hall & Macionis (1998: 42) as the “visitation to vineyards, wineries, wine festivals and wine shows for which grape wine tasting and/or experiencing the attributes of the grape wine region are the prime motivating factors for visitors.” This suggests that beyond wine and viticulture, wine tourism is ‘marked’ by the whole wine region and its attributes, often referred as ‘winescape’ (Peters 1997; Hall et al. 2000). Three components constitute the winescape: the presence of vineyards, the wine-production activity and the wineries where the wine is produced and stored (Telfer 2001). The wine and tourism industries are increasingly being recognised as “natural symbiotic partners” (Carlsen & Charters 2007: 19). This partnership is encompassed by the term wine tourism (Carlsen & Charters 2007). The development and emergence of wine routes is an essential constituent of the wine tourism industry. Wine routes are characterised as the ‘roadways’ to experiencing the wines and engaging in the unique wine tourism experiences offered by various wine regions around the world (Carlsen & Charters 2007). This chapter aims to review the literature on the significance of the worldwide development of wine tourism and ultimately in South Africa. First, the concept of wine tourism in special-interest tourism is placed in the broader tourism field. Second, the literature on wine tourism in Old and New-World wine countries, wine route development around the world and theoretical models of life cycle development is reviewed. Third, attention is directed at writings on social and economic development impacts of the wine tourism industry. Last, research findings on wine tourism in South Africa is explored.

According to Johnson et al. (2000) visits to vineyards have been part of travel since the time of the Grand Tour⁴, perhaps even from the times of Ancient Greece or the Roman Empire. However, it was

⁴ The idea of the Grand Tour started in the mid-17th century and increased in acceptance during the 18th and 19th centuries. The tradition was experienced by royalty from Northern Europe, particularly from England, and was later implemented by wealthy Americans. The Grand Tour was regarded as an opportunity for higher social status, educational enrichment, new cultural experiences and adventure (Johnson et al. 2000).

only during the mid-19th century that wine tourism emerged as a special travel interest (Johnson et al. 2000). Wine tourism is a significant component of both the tourism and wine industries (Johnson et al. 2000; Bruwer 2003). Of course, wine and tourism have long been intimately connected, but only since the beginning of the 20th century has this relationship really been recognised by researchers, governments and the two industries involved (Hall et al. 2000; Johnson et al. 2000; Carlsen & Charters 2007). For the tourism industry wine tourism (superstructure, products and experiences) contributes to the attractiveness of a destination as well as being a great motivating factor for visitors since wine is associated with hospitality, relaxation and socialising with others and is also complementary to food. Conversely, for the wine industry wine tourism is a way to build relationships with customers and visitors who can experience the “romance of the grape” first hand (Johnson et al. 2000: 1). Figure 2.1 shows the position of wine tourism in relation to other types of tourism.



Source: Adapted from Scott (2004)

Figure 2.1 Position of wine tourism in relation to other types of tourism

In the case of many smaller wineries, wine tourism provides opportunities to sell wine directly to visitors at the cellar door. A cardinal factor in determining the future success of the wine industry is to build unique identities and images of the wineries, wine regions and wine countries of origin. A fundamental feature of tourism is place differences, whereas wine is branded and identified based according to its geographical origin (Hall & Macionis 1998; Bruwer 2003; Garrod, Wornell & Youell

2006). The purpose of the remainder of Chapter 2 is to construct a theoretical foundation of relevant concepts in wine tourism.

2.2 WINE TOURISM IN CONTEXT

The first subsection (2.2.1) concentrates on the position of wine tourism within the broader tourism industry; the second subsection (2.2.2) the evolution of definitions regarding wine tourism; the third (2.2.3) on the profile of typical wine tourists; the fourth (2.2.4) on the role of the cellar door in the overall wine tourism experience; fifth (2.2.5) on the wine tasting experience; and sixth (2.2.6) on the additional activities and experiences offered by wineries. These sections require discussion as it sets the backdrop for the evolution of the wine tourism industry from solely focusing on wine to the current incorporation of various other facilities, activities and auxiliary services available on a single winery node.

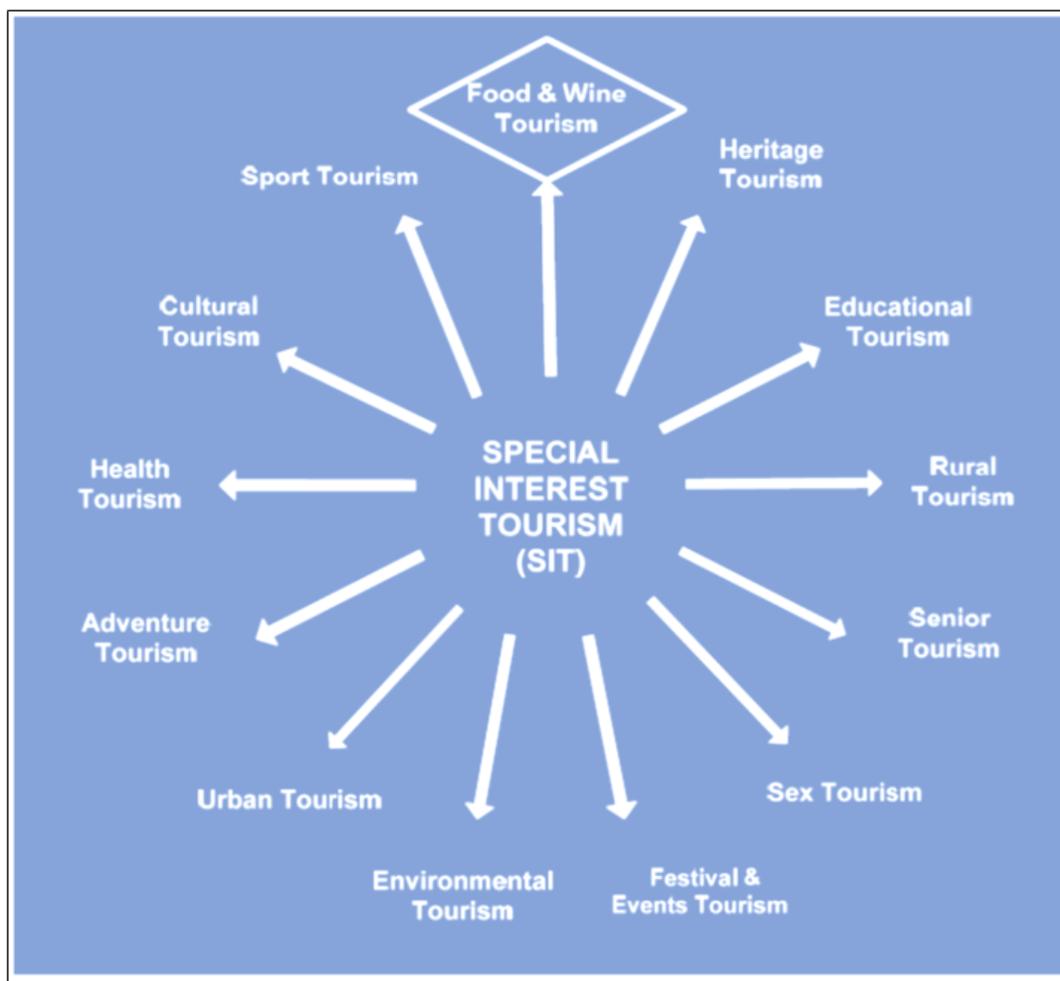
2.2.1 Wine tourism within the broader tourism field

It is important to clarify what wine tourism is and where it fits into broad tourism. Travel and tourism are the largest and most miscellaneous industries in the world (Kirkman 2010) Tourism is simply defined as a form of recreation⁵ as are activities such as hobbies and sports (Burkart & Medlik 1981; Carr 2002; Holloway 2002; Sharma 2005; Hall & Page 2006; Williams 2009; Williams & Lew 2015). However, tourism's miscellany frustrates attempts to give it a single definition (Weaver & Lawton 2002). Tourism can be viewed as an activity, a system or an industry (Huybers 2007; Kirkman 2010). Seen from the supply side, it is considered to be an industry (Huybers 2007). From the demand side, tourism functions both as activity and experience. The combination of the demand and supply sides of tourism creates a system (Hall & Page 2006; Huybers 2007). Tourism's supply side includes a destination's cultural and natural resource base, hospitality products, auxiliary services and facilities, and transport to the destination (Lubbe 2003). According to Davidson & Maitland (1997: 23) the attractiveness of a specific tourism space arises from its combination of resources and services, otherwise "a place will not work as a destination." The motivations that induce tourists to travel, how often they travel and where they travel to, constitute tourism demand (Cooper 2008). Tourism demand encompasses the needs as well as the unique motivations of tourists (Lubbe 2003). For tourism, experiences are no longer optional value adders, but rather they are the mandatory benefits of any

⁵ Recreation is the discretionary use of people's leisure time (Sharma 2005).

tourism offer. In no other industry does the desire for experiences have more impact than in the travel industry (Pikkemaat et al. 2009).

Tourism motivations can be classified into three wide-ranging categories, namely leisure tourism, business tourism and other forms of tourism, including health, study and religious pilgrimages (Holloway 2002). This research concentrates on one type of leisure tourism, the latter being subdivisible into mass tourism, visiting friends and family tourism and *special-interest tourism* (SIT). SIT is the establishment of unique and authentic leisure and recreational experiences motivated by the interests of individuals and groups (Burkart & Medlik 1981; Holloway 2002; Lubbe 2003; Sharma 2005; Williams 2009). SIT developed from a maturation of the stakeholders in the tourism industry as tourists became more sophisticated and knowledgeable in their travel plans (Van Zyl 2002). Thus, special types of tourism services and products are developed to meet the special and specific travel needs of these tourists. SIT involves various activities, including adventure, sports, cultural activities and gambling (Van Zyl 2002). Therefore, special-interest tourists choose to engage with a specific service or product that will satisfy their specific needs and interests. SIT is clustered into the 13 categories shown in Figure 2.1, with food and wine tourism being viewed as the main category (Van Zyl 2005). According to Marzo-Navaroo & Pedraja-Iglesias (2012) SIT has a considerable economic impact. The tourists engaging in this type of SIT spend more, travel more frequently and participate in more activities (Lopez-Guzman, Sanchez & Garcia 2009; Manila 2012). Tourists are continually searching for more exciting and new forms of travel as substitutes for the typical sun, sex and sea tourism (Lopez-Guzman, Sanchez & Garcia 2009; Marzo-Navaroo & Pedraja-Iglesias 2012). As with most other forms of SIT, the prime motivations for engaging in wine tourism activities are to visit wineries to experience wine tasting, meet the wine maker or producer, gathering socially, learn about wine and enjoy a day out. According to Shor & Mansfeld (2009) wine tourists are wine consumers seeking an experience that is dependent on the product.



Source: Kirkman (2010: 43)

Figure 2.2 Types of special-interest tourism with food and wine tourism emphasised

Since 1990 there have been rapid advances in wine tourism, both in academic interest and in development of the industry and destinations (Getz 2000; Olaru 2012; Alebaki, Iakovidou & Menexes 2014). The initial stage of wine tourism research developed rapidly in the 1990s and the first conference on wine tourism was convened in Australia in 1998 (Getz & Brown 2006; Olaru 2012). According to Getz (2000) the evolution of wine tourism is happening concomitantly with development strategies adopted by destinations. These strategies emphasise distinct 'wine tourism terroir'; wine tourism as a form of consumer behaviour; and wine tourism as a direct selling and educational opportunity for wineries. It is clear that wine tourism is used to create distinct identities for destinations or wine regions and it is a way to involve consumers in the wine-production process (Getz 2000). Academic and industry interest in this multifaceted sector has generated a variety of studies on various aspects, such

as wine tourism business, wine tourism culture and heritage, wine tourism marketing, food safety and wine tourism and wine tourist behaviour (Carlsen & Charters 2006; Alebaki, Iakovidou & Menexes 2014). The multifaceted nature of this study field makes it difficult to define wine tourism since this phenomenon encompass numerous aspects. The next section explores the various definitions of wine tourism.

2.2.2 Wine tourism defined

Again, the complexity of wine tourism has made it difficult to define (Kolyesnikova & Dodd 2009; Pejanovic et al. 2014). Unlike Hall & Macionis's (1998) classic definition (see 2.1), South Australian Tourism Commission (1997: 4) focused on activities in defining wine tourism as "any experience related to wineries and wine production in which visitors participate when on a day trip or longer visit...wine tourism can range from a visit to a single cellar door outlet while en route to a main holiday destination to intensive week long, live-in experiences focused on the wine process." Johnson (1998) has contended that the Hall & Macionis (1998) definition of wine tourism only suggests that visitors to wineries have wine-related motivations. However, it is essential to remember that visitors to wine regions and wineries have differing interests and knowledge of wine. Accordingly, Johnson (1998) defined wine tourism as visitation to vineyards, wineries, wine festivals and wine shows for the purpose of recreation. This definition emphasises that the activity is for recreational purposes. Considered from a broader regional perspective, a definition like Johnson's (1998) does not adequately express the romance of the grape, winescapes and wine-producing regions. Although these definitions have gained wide acceptance, it is important to remember that the concept, definition and product of wine tourism are the subjects of ongoing debate and development.

The Australian National Wine Tourism Strategy's (1998) endeavours at defining wine tourism concentrated on the experience, intentionally broadening the definition to visitation to wineries and wine regions to experience the unique qualities of contemporary Australian lifestyle associated with the enjoyment of wine at its source, including wine, food, landscape and cultural activities. This description fixes on the multiple activities and sensations experienced by visitors when visiting a winery or wine region, so implying that wine tourism does concentrate solely on the enjoyment of wine.

Many definitions of wine tourism concentrate on the wine consumer, because ultimately it is consumers who define the wine tourism product. There are some stakeholders that are essential to a

definition of wine tourism, namely the wine producers, the tourism agencies and the consumers (Getz 2002). Therefore, wine tourism is a practice of consumer behaviour as well as being an approach for destinations to create and market attractions and images related to wine. Wine tourism presents opportunities to wineries for directly educating visitors about their products and the wine-production process as well as selling their products to winery visitors. Thus, Getz (2002: 4) defines wine tourism as “travel related to the appeal of wineries and wine country, a form of niche marketing and destination development, and an opportunity to direct sales and marketing on the part of the wine industry.”

Olaru (2012) added three components that encompass the concept of wine tourism. First, wine tourism attracts visitors, such as connoisseurs, predominantly for purchasing wine. Second, wine tourism plays the role of attracting visitors to winelands for the purpose of educating them about the wine-production process and allowing them to taste the wine. Third, wine routes are picturesque routes which take visitors on a journey through beautiful vineyards and cultivated areas of a wine region (Olaru 2012). Apart from supporting the definition of Hall & Macionis (1998), this research subscribes to the broader definition by the South Australian Tourism Commission (1997) as well as Olaru’s (2012), as they highlight the wine tourism experience, including food and wine, the admiration of landscapes in wine regions and wine routes, and the experiencing of the cultural activities unique to the regions.

Some tourists and consumers prefer quiet and undisturbed relaxation, ‘soft’ tourism experiences and authenticity (Pikkemaat et al. 2009). It is clear that the supply side of tourism is confronted by consumers looking for multi-optional offers and experiences presented in exciting but relaxed and authentic ways. Wine tourism appears to be able to meet these requirements. Presently, the wine tourist’s main motivation is to enjoy and experience wine and added services, products and contexts. For example, the vineyard experience involves the vineyard, food, architecture, wines, distinctive environments, employees and other visitors, as well as the wine region’s appeal, the events and festivals in the region and the cultural heritage features. All these elements create a package of cultural, gastronomic and additional tourist goods and services with wine as the fundamental reason for the visit (Pikkemaat et al. 2009). Again, wine visitors do not travel for the sole purpose of tasting the wine, although this activity remains at the core, as now they search for any added value to their experiences.

Although the wine and tourism industries are interwoven, there is still uncertainty and misunderstanding about how tourism and wine can positively influence one another as well as the regions within which they coexist. According to Carlsen (2004) in many wine regions and tourism

destinations there has been a recognition that the benefits accruing from wine tourism go beyond the cellar door to nearly all areas of regional economies. These benefits can also spread into the surrounding urban areas and even to the countries of origin of the wine tourists (Scherrer, Alonso & Sheridan 2009). The combination of tourism and wine production provides vast potential for collaboration to promote wine regions and stimulate new business opportunities. Wine tourism also provides a palpable way to address an apparent need to attract people to rural areas, uphold aspects of 'traditional' rural lifestyles and agricultural production, as well as conserve the rural landscape (Mitchell & Hall 2006).

2.2.3 Type of wine tourists

Post-1995, academic research attention in Australia, New Zealand, Canada and the United States, turned to wine tourists and the reasons for their visits (Mitchell & Hall 2006). Contributions were made by researchers around the world, such as Dodd (1995); Peters (1997) and Skinner (2000) in the USA; Thevenin (1996) and Frochot (2000) in France; Beverland (1998), Johnson (1998) and Mitchell & Hall (2003) in New Zealand; Macionis (1997) and Dowling & Carlsen (1999) in Australia; Preston-Whyte (2000), Bruwer (2002), Tassiopoulos, Muntsu & Haydam (2004) and Demhardt (2003) in South Africa; Sharples (2002) in Chile; Gilbert (1992) in Spain; Hackett (1998), Williams & Kelly (2001), Telfer (2001) and Williams & Dossa (2003) in Canada; and Pavan (1994) in Italy.

Much of the research on wine tourists, has concentrated on the supply side, rather than on the wine tourism consumers or tourists, the demand side (Alebaiki & Iakovidou 2011). Olaru (2012) has claimed that the main reasons for visiting a winery, a vineyard or a wine region vary from visitor to visitor. Visits to wine regions are for attending festivals devoted to wine and traditional food, visiting wine cellars, enjoying shows, for recreation and visiting relatives and friends (Dodd & Bigotte 1997). Additional activities or facilities offered to tourists attract new groups of tourists (Dodd & Bigotte 1997). Table 2.1 lists various primary and secondary facilities offered at wineries.

Table 2.1 Facilities, services and activities available at wineries

Facilities at wineries					
Primary facilities	Wine tasting	Craft and souvenir shops, galleries	Conference facilities	Overnight accommodation	Social function facilities
	Cellar door sales	Educational tours	Restaurants by arrangement only	Museums	Picnic facilities
	Historical buildings	Restaurants open all week	Restaurants open on weekends	Petrol filling stations	Amphitheatres
Secondary facilities	Vineyard tours	Cooking classes	Children's playgrounds	Animal feeding and/or watching	Golfing courses
	Meet the winemaker	Wine or other festivals	Hiking and biking trails	Spas	4x4 courses
	Organised winery tours	Barbeque facilities	Fruit picking by visitors	Horse and pony rides	Beauty classes
	Fireplaces	Cellar launches	Fresh produce sales	Swimming	Spectacular views

Source: Adapted from Bruwer (2002a)

It is vital for wineries to take note of the reason why tourists visit so to attract and retain tourists, and to cater to the visitors' desires (Bruwer 2002a; Olaru 2012). Even more important is to understand the reasons underlying a tourists' decisions to visit a winery. Winery management can either decide to evolve with changing desires of visitors or remain unchanged with wine production remaining the winery's prime focus (Weiler & Hall 1992; Dodd 1995). Once the needs and desires of visitors have been identified, the next step by a winery is to develop a marketing plan. The latter can include various promotional features such as advertisements in wine magazines, websites, newsletters, wine festivals and events, wine tasting, synergy deals and wine route promotional activities (Bruwer 2002a).

Descriptions of the typical wine tourist in pre-1995 scholarship were generally narrow and negative. Spawton (1986), for example, described the typical tourist as a 'mobile drunk'. McKinna (1987: 85) saw wine tourists as "the passing tourist trade who thinks a 'winery crawl' is just a good holiday", while a milder description was a 'wine connoisseur'⁶. However, these definitions are not satisfactory. So, by the 1990s descriptions of wine tourists became more positive. Folwell & Grassel (1995: 14)

⁶ A wine connoisseur is someone who is an expert judge in matters of taste (Edwards 1989).

argued that in the 1980s the winery visitors in Washington State were “middle-aged with an above average income.” According to the South Australian Tourism Commission (1997), tourists are characterised mostly as being couples in professional occupations, with a higher education and income and who have no children (South Australian Tourism Commission 1997). On the other hand, Dodd & Bigotte (1997) maintained that income is the primary factor defining the consumption and sales of wine. Such tourists have high levels of financial and educational status. Mitchell, Hall & McIntosh (2000) characterise the typical wine tourist as being in the 30-50 age cohort, earning a moderate to high income and either in or close to the wine region. Charters & Ali-Knight (2002) have classified wine tourists into five segments. First, wine lovers who consist of second, connoisseurs and third, wine interested. Wine lovers visit a vineyard or winery to taste, purchase and learn about the wines as well as pick grapes and strengthen their education regarding the wine-production process. Fourth, wine novices are, however, less definable. They are attracted by additional activities offered by wineries, such as trips in the cellars or to eat in the wine-cellar restaurant. Fifth, hangers-on are visitors who visit a winery as part of a group but have no interest in the wine itself. Hall & Macionis (1998) described three segments of wine tourists, namely the wine lovers, the wine interested and the curious tourist. Table 2.2 marshals the main features of each.

Table 2.2 Categories of wine tourists

Categories	Characteristics
Wine lovers	<ul style="list-style-type: none"> • Extremely interested in wines and winemaking • Wineries may be sole purpose of visit to destination • May be employed in wine and food industry • Likely to be mature with high income and high education levels • Likely to be regular purchaser of wine-and-food magazines • Will have visited other wine regions • Highly likely to purchase at winery and add name to any mailing list
Wine interested	<ul style="list-style-type: none"> • High interest in wine but not sole purpose of visit to destination • Moderate to high income bracket, tend to be university educated • Occasional purchaser of wine-and-food magazines • Regular purchaser of ‘lifestyle’ magazines • Word of mouth and wine columns in newspapers may be important for arousing interest in region • Likely to have visited other wine regions • Familiar with winemaking procedures • Likely to purchase at winery and add name to any mailing list • Potential for repeat purchase of wine through having visited winery
	Continued overleaf

Table 2.2 continued	
Curious tourists	<ul style="list-style-type: none"> • Moderately interested in wine but not familiar with winemaking • Wineries seen as ‘just another attraction’ • Moderate income and education • Winery tour a by-product of visit to region as visiting was for unrelated purposes
	<ul style="list-style-type: none"> • May have visited other wine regions • Curiosity aroused by drinking or seeing winery product or general tourism promotion • Opportunity for social interaction with friends and/or family • May purchase at winery but will not join mailing list

Source: Adapted Hall & Macionis (1998)

Treloar, Hall & Mitchell (2004) have described the typical winery visitor as female with either a higher education or a university degree, higher than average income, a local traveler, having some experience of wine or wine education. Studies conducted in Australia, New Zealand, Texas, Canada and South Africa support these findings by Treloar, Hall & Mitchell (2004) Charters & Ali-Knight (2000); Williams & Kelly (2001); O’Neill & Palmer (2004); Tassiopoulos, Muntsu & Haydam (2004); Brown & Getz (2005); O’Neill & Charters (2006); and Tassiopoulos & Haydam (2006).

The literature on wine tourist behaviour provides evidence that demographic variables play a dominant role (Bruwer 2002a; Treloar, Hall & Mitchell 2004). Dodd & Bigotte’s (1997) study of visitors to Texas wineries in the USA revealed that younger respondents were more critical of their overall winery experience and regarded the quality of service at a winery as the most significant factor in visitor satisfaction. Charters & Fountain (2006) that older Australian visitors regarded the product and its quality to be most important (O’Neill & Palmer 2004; O’Neill & Charters 2006). In New Zealand, Alonso, Fraser & Cohen (2007) identified that older visitors have better knowledge of wine along with a greater interest in wine than younger respondents. Although the younger respondents earned lower incomes, their expenditures at wineries were larger. The next feature of wine tourism paid attention to the role of the cellar door.

2.2.4 Role of the cellar door

Wine tourists' experiences relate significantly to the cellar door⁷ (Williams 2011). The cellar door plays a vital role not only in wine distribution but also in direct sales. The cellar door staff play crucial roles in the overall cellar door experiences and perceptions of winery visitors. The way visitors are treated by the staff is an essential aspect of the winery experience. Thus, cellar door staff have professional responsibility toward wine tourists as they can affect success or failure of the experience (Bruwer 2002b). It is essential that cellar door staff are approachable, knowledgeable and willing to provide personal attention while ensuring an experience that is educational (Bruwer 2002b; Williams 2011). The staff must build a relationship with potential customers by engaging with them personally and educating them about the winery's products (Charters & O'Neill 2001). This can increase the possibility of successful direct sales through channels such as wine club memberships and loyalty programmes. To foster such experiences by consumers, it is necessary for cellar door staff to possess skills related to customer service, tourism and hospitality, rather than to wine-production (Williams 2011). Moreover, knowledge of the wine products and the competence of staff to discuss wine-related topics with potential customers will greatly improve visitor experiences at a winery.

Baird (2012) claimed that wine tourism is a vital aspect of added value for vineyards and the significance of the experience at the cellar door is a crucial element. Charters & O'Neill (2001: 14) have averred that, "it is important to stress that the key areas of winery performance in this relationship (with winery visitors) are responsiveness and contact, which relate directly to the customer's relationship with staff at the cellar door." For Batra (2008) wine tourism is a brand differentiator because it enables and empowers wineries to meet and engage face-to-face with their customers. So, leading to long-term connections between customers and the wine products. Charters & O'Neill (2001) have pointed out three major benefits of cellar door sales; namely the development of brand equity; distribution at low marginal cost; and the opportunity to add value. Alonso & O'Neill (2009) found that Spanish wineries use cellar door sales as part of a long-term strategy to convert visitors and

⁷ Cellar door: The place where a winery sells its wine directly to the consumer. These cellar doors are often on-site, or in a nearby town. A cellar door usually provides wine tastings and its presence attracts tourists and wine lovers (Cellar Door Metrics 2008).

generate interest in wine brands and they can also serve as a marketing tool leading to brand loyalty behaviour by new winery visitors.

The approachability, politeness, overall service and knowledge of the staff are important attributes in the decision to purchase or not to purchase wine. Appropriate employee selection and training are critical for the success of tasting rooms (Dodd 1995). Therefore, staff selection and training should be of utmost importance when developing cellar door facilities at a winery. Carlsen (1999) has emphasised that it is crucial to recognise the training needs and requirements of the people involved in wine tourism. In this way, the quality of the wine tourism experience can be maintained and enhanced (Education and Training Needs 1998). Thus, it is no longer acceptable to merely welcome customers and pour the wine. Consumers now are more wine savvy and they demand expertise from tasting room staff (Dodd 1995) The next section more closely explores the wine tasting experience.

2.2.5 Wine tasting experience

Wine tourism provides numerous benefits to wine farms and estates, local economies and consumers. These benefits include greater margins, augmented sales, positive economic results for local communities, attraction of new customers and increased brand loyalty of existing customers (Kolyesnikova & Dodd 2009). Less recognised, but very important is the significant benefit of allowing the general tourist to taste the wines at the winery. This is where the notion of wine tourism started when wineries started to allow visitors to taste their wines in the winery. There is evidence that by allowing visitors to taste wine at a wine farm or estate, encourages them to ultimately make a purchase (Kolyesnikova & Dodd 2009). Thach (2008) observed that in 50-90% of the cases visitors purchase at least one item after tasting wine. A study by Kolyesnikova & Dodd (2009) supported these findings and concluded that the majority of wine tourists will purchase wine or additional accessories at the end of their visit. A joint research project by ten universities in various countries confirmed the significance of wine tasting (Thach 2008). The latter study examined consumer decision-making factors in selecting wine. Thach (2008) established that the main decision-making factor to purchase wine in both a restaurant setting and in retail outlets was the consumer's previous experience in tasting wine at the cellar door (Thach 2008). Therefore, it is essential for winemakers to create more opportunities for their visitors to taste their wines. These opportunities can be at the winery itself, at wine festivals, wine shows or at retail outlets. Thus, it is vital that wineries take advantage of every opportunity inside and outside the tasting room. The importance of the tasting room is highlighted by the fact that a significant portion of tasting room sales make up overall winery sales. Even in the Old-World, where wine tourism

is not traditionally part of the culture, winemakers have begun to realise the significance and benefits of selling their wine directly to consumers (Thach 2008). Clearly, it is essential for winery managements to pay attention to the importance of their tasting rooms as profit centres for their wineries. Dodd (1999), O'Neill & Charters (2000) and Nowak & Newton (2006) have made intensive examinations and documentations of research on the significance of the tasting-room experience.

Research on wine routes in Greece by Vlachvei & Notta (2009) revealed that personally meeting the winemaker, learning about the winemaking process, tasting the wine and eventually purchasing wine on-site, are key motivations for visiting a winery. Other significant benefits of allowing visitors on-site include increased and enhanced reputation, promotion and publicity and ultimately increased sales (Vlachvei & Notta 2009). The development of wine tasting rooms has played a key role in allowing people to learn and gain an appreciation for the wine industry (Baird 2012). In Addition, the opportunity to taste wines first-hand is a means to overcome the hesitancy of consumers to purchase brands in a retail situation, where the brands are unknown to them (Baird 2012). Now in 2017, it is not just about having a wine tasting venue as some of the venues are state-of-the-art architecture to draw visitors to experience a very specific environment.

Section 2.2 is concluded with a short exposition of the desires of visitors over and above tasting and purchasing wine and the additional facilities, activities and services available in a winery to satisfy these tourists' needs.

2.2.6 Seeking more than wine

Contemporary wine tourists are becoming more experienced and more demanding. These wine tourists strive for individuality and expect additional value, they are more flexible, more sensitive about pricing and they are economically independent (Pikkemaat et al. 2009). These demands challenge the tourism industry to provide alternative leisure facilities such as theme parks, food, wellness, gambling, information and communication technologies. Getz & Brown (2006) have recognised three groups of characteristics, crucial to the wine tourism experience, namely wine product, destination appeal and cultural product.

Wine tourism is not just about growing cellar-door sales: It is about the total experience and package on offer to tourists. This experience should incorporate food and wine, the sampling of the wine and other local products, visiting local attractions, engaging in leisure activities, meeting the local people

and appreciating the rural atmosphere (Beames 2003). All local businesses and operators play a part in providing this ‘total product’ which serves as a guideline for regional development and improving their part in wine tourism. Recognition of this can enhance prosperity, employment opportunities and growth in the surrounding rural areas. It is hence important to consider what is offered and how the wine tourism experience can be developed and integrated with other activities (Beames 2003).

The range of facilities available at wineries is vital to attracting tourists. Examples of facilities are wine tasting rooms, restaurants, accommodation, museums, art galleries, wine tours, private function venues, wine caves, barrel halls and historical displays. The latter make important contributions to the education visitors receive on-site. These activities can be paired with live wine-making demonstrations that allow visitors to meet the winemaker in an intimate environment where they gain direct knowledge about the techniques used in the wine-production process (Baird 2012). The natural scenery surrounding a winery, the winescape, makes a crucial contribution to the overall wine tourism experience and rates as a great motivating factor for visitors.

Clearly wine tourism involves more than just visiting a winery and purchasing wine. It is “the culmination of a number of unique experiences: the ambience, atmosphere, surrounding environment, regional culture and cuisine, local wine styles and varieties” (Williams 2001: 9). The rural landscape plays an integral part in creating this ultimate wine tourism experience. Tourists tend to enjoy picturesque settings so that rural landscapes carry special meaning for visitors. The cultural meaning of rural lifestyles contributes to tourist images and expectations. ‘Rural’ refers to people, places, lifestyles, artefacts, values and social relationships (Carmichael 2005). Valentine (1997) described the visualisation of rural as a community that is peaceful, tranquil and close-knit. This is a common romantic vision of rural life where people can escape from busy urban centres (Short 1991; Valentine 1997). This idealistic, sentimental view of rural landscapes fits in well with the needs and desires of wine tourists. An understanding of the needs of the wine tourists has various benefits for stakeholders in the wine and wine tourism business. A winery location in the picturesque surroundings of a rural landscape, can lead to increased tourist numbers and greater appreciation of the wine product, wine-tasting experience and wine-making process.

In the previous sections the typical wine tourist, the role of the cellar door and the desired wine tourism experience were explored. Attention is next turned to the development of the wine tourism phenomenon on a global scale.

2.3 WINE TOURISM GLOBALLY: OLD-WORLD vs NEW-WORLD

This section first discusses the phenomenon of wine tourism in the Old-World (2.3.1) and then the New-World (2.3.2) wine countries. Then the focus moves to the evolution of wine routes globally (2.3.3), and finally there is an exposition of theoretical models that can be applied to explaining the development of wine routes.

Wine tourism has emerged as an important part of tourism in many countries around the world (Marzo-Navarro & Pedraja-Iglesias 2012). A growing body of literature exists on the links between wine tourism and themes like destination image, local foods, leisure, consumer behaviour, socio-economic and/or environmental sustainability or hedonic consumption (Hall et al. 2000; O'Neill & Palmer 2004; Poitras & Getz 2006; Wargenau & Che 2006; Alonso & Liu 2011). Researchers have recognised the importance of these themes and links at a time when there have been continuous and significant developments in the global wine industry. For instance, traditional wine-producing countries like Spain and France have experienced modest growth, even decreases in wine consumption in the local market (Wine Institute 2011). Simultaneously, the wine sector has strengthened and improved in various countries of the New-World, particularly Argentina, Australia, Chile, New Zealand and South Africa in the southern hemisphere, and some in the northern hemisphere, including Canada and the USA (California) (Alonso et al. 2015). These developments have far-reaching implications for the commercialisation and internationalisation of wine consumption and wine tourism, and consequently for wine marketing and for research and practice in wine tourism (Alonso et al. 2015).

Wine tourism research has predominantly focused on the New-World wine countries and regions (Mitchell & Hall 2006). Wargenau & Che (2006) noted that the notion and development of tourism have not been central in the thinking of the European wine industry as it has been in some newer wine-producing areas. Nevertheless, changes and improvements are occurring in various European wine-producing countries. Where there is growing pressure to market their wine products, while sustaining and preserving the traditional wine production process and culture, and potentially creating more employment (Alonso et al. 2015).

2.3.1 Old-World wine countries

Spain, Germany, France, Italy and Portugal are renowned wine countries of the Old-World known for preserving traditional wine cultures of producers and consumers. For example, Spain boasts the largest area under vineyards in the world and it ranks third in volume wine produced. Spain has over 70 Designations of Origin of Wine (DOC) that are produced by over 5000 wineries. Yet, the development of wine tourism in Spain is in an infancy or emerging phase. This is because less than 10% of its wineries are open to the public, so delaying the development of wine tourism. By contrast, in New-World wine countries like Australia and the USA 70 to 80% of the wineries are open to the public (Marzo-Navarro & Pedraja-Iglesias 2012; Alonso et al. 2015). According to Menival & Han (2011), world production of wine has begun to exceed consumption and new approaches are called for to enhance brand loyalty and stimulate sales. Wine tourism has existed in Europe since antiquity and was developed in Germany for example, early in the 20th century. However, European wine tourism has seen little formal development as opposed to the levels reached in New-World wine countries like the USA, Australia, Canada, New Zealand and South Africa (Menival & Han 2011). The first wine route in Schweigen-Rechtenbach, Germany was developed in 1920. Since then wine tourism in Germany has been a major growth sector in the country. Where, in contrast to Spain, 60% of the wineries are open to the public (Marzo-Navarro & Pedraja-Iglesias 2012). Austrian wine tourism reveals similar features to Germany with its three wine regions, namely Lower Austria, Styria and Burgenland, with the Southern Styria Wine Route being the most structured (Zisou 2013).

Wine tourism has been active in France since the 1950s and the country is probably the most popular tourist destination in the world where a significant number of the tourists visit its wine regions and their wine producers. But the perception exists that wine tourism in France is less organised and less focused than in the New-World and, indeed, considerably less academic research on the topic has been conducted there (Menival & Han 2011).

However, according to Waller (2006), the production of wine in France generates €20 billion annually and the wine industry employ about 500 000 workers. But the focus of the country's wine industry is on its wines, rather than on developing a wine tourism industry and ultimately increasing wine tourist numbers (Byrd et al. 2016). Misconceptions about wine tourism development in France has created increased competition for France by emerging New-World wine markets, despite the strengthening of the French wine brand (Zisou 2013). Waller (2006) has claimed that the French wine industry's

attachment to tradition is delaying the transformation of wine into a leisure product. Nonetheless, wine tourism is not necessarily a new occurrence in France, the first wine route in Alsace having developed in the 1950s. During the 1980s more disciplined consideration and attention was directed toward the development of wine tourism in France. Even during the 'crise viticole' (wine crises) in 1907, France has remained a leader, and example for other wine producing countries, in the establishment of wine tourism experiences in prosperous regions such as Bordeaux, Burgundy, Beaujolais, Côtes-du-Rhône, Provence and Champagne (O'Neil & Palmer 2004). In 2004, France attracted 7.5 million wine tourists of whom 2.5 million were international tourists. Despite this, the perception that wine tourism in France is less developed and unorganized remains especially regarding the number of visitors (Waller 2006; Zisou 2013).

Italy is a leading tourism destination, its popularity being strongly linked to its many cultural and historical attractions and national heritage (Romano & Natilli 2009). But many of the country's rural areas are not visited by tourists. Wine tourism is a way to attract tourists to these rural regions, particularly in the Italian peninsula's wine regions where wine tourism has the potential to stimulate rural development (Zisou 2013). The development of Italy's wine routes is a means of engaging the agricultural sector to rural development (Zisou 2013; Alonso et al. 2015). The emergence of 140 Italian wine routes were established in the Abruzzo, Basilicata, Calabria, Campania, Umbria, Marche and Tuscany regions (Romano & Natilli 2009). The wine routes were an initiative of the Movimento Turismo del Vino established in 1993 as well as the Associazione delle Città Del Vino that was established to promote development in regions dependent on wine. Italy received official recognition for their wine routes in 1999 (Romano & Natilli 2009; Alonso et al. 2015). According to Movimento Turismo del Vino (2012) international visitors rank wine as the third most important attraction for visiting Italy. Some 3.5 million tourists visit Italy's wine regions annually (Movimento Turismo del Vino 2012). Wine production is strongly associated with the traditions of countries of the Old-World so that wine tourism need not be regarded as something original and unique (Zisou 2013).

Following on the success of wine tourism in other Old-World wine countries, Portugal has joined the club as it were. The wine routes in Portugal originated from a movement that involved producers, oenologists, distributors, consumers, statutory organisations and several other bodies connected to the industry (Barros & Machado 2010). This is a new phase in the growth of the Portuguese wine industry which aims to reach people who are interested in wine and captivated by Portugal's natural and cultural heritage. The improvement in the quality of the country's wines in the last few decades has contributed

much to the development of wine tourism. To date numerous wine routes have emerged in Portugal but because wine tourism in Portugal is a relatively new field of study, little research has been conducted (Correia, Ascensão & Charters 2004). In contrast to the Old-World wine countries, section 2.3.2 looks at the wine countries of the New-World.

2.3.2 New-World wine countries

In Canada wine tourism is concentrated in the Niagara Peninsula in Ontario and in British Columbia (Wade, Holmes & Jacobs 2010). Most of the wineries are associated with a wine route established by the Wine Council of Ontario in 1988. In British Columbia all wineries are legally obliged to offer wine tasting and direct sales of their products at the cellar door (Zisou 2013). In Chile only five of the wine-producing regions have developed wine routes, namely the Casablanca, Cachapoal, Aconcagua, Maule and Curico regions. Despite successful wine exports by Chile, the wine routes do not share the same success due to the distances between the wine regions and the main capital, conflict between producers as well as the lack of financial resources and motivation for wine makers to enter the wine tourism sector (Kunc 2008; Zisou 2013). Chile received 2.2 million tourists in 2005 with some 237 000 visitors to its wineries compared to Australia where more than half a million tourists visited its wineries (Kunc 2008). The majority of the visitors to wineries in Chile were foreign tourists whereas only 20% of the visitors in Australia and New Zealand were foreign tourists. In Chile the wine tourists spent US\$8 million compared to A\$120 million in Australia in 2004.

Australia is a leader in wine tourism development and the country is one of the world's most popular tourism destinations (Hall & Macionis 1998). However, most tourism is concentrated in large cities like Sydney and Perth. Hence, Australia faces a major challenge to attract foreign visitors to its rural regions. The large export markets of the Australian wine industry have encouraged an international interest in the country's wine regions (Beames 2003). Australia has long recognised its wine as a strong tourism asset and the development of the wine industry as a means of enhancing regional growth. Since the end of the 1990s the country has made wine tourism a national priority by contributing A\$70 000 to the Winemakers' Federation of Australia for the development of a national wine tourism strategy (Beames 2003; Brown & Getz 2005). In 2009 there were more than 5 million visitors to the 1647 Australian wineries in more than 60 wine regions and the total expenditure of the wine tourists was A\$ 7.1 million (Quadri-Felitti & Fiore 2012). About 11% of the 5 million international tourists to Australia visited the Australian wineries in 2009. A new movement in Australia is the promotion of wine tourism around gastronomy because there is lack of good restaurants in the

vineyard locations. Also, in order to compensate for the long distances from the cities to the wineries, facilities such as spas and hotels have been developed in the wine regions (Manila 2012).

The focus of international research on wine tourism has moved from the traditional Old-World wine trails to wine tourism as a product and experience (Sharples 2002; Byrd et al. 2016). Research has revealed that the challenges to and concerns hindering the development of wine tourism include the promotion of wine routes without funding for facilities or the training of cellar door staff, lack of infrastructure and a lack of sectoral linkages and organisational coordination within the wine tourism industry (Kunc 2008).

Wine tourism is a phenomenon and product undergoing substantial development where it is sold in the context of a rural paradise as leisure, food, undisturbed atmosphere and plentiful outdoor activities (Barber, Taylor & Deale 2010). Many wine regions around the world find it financially beneficial to promote and encourage wine tourism. At the community level a variety of stakeholders seek benefits for residents and questions have been raised about the cost of wine tourism. Local residents in wine regions and special-interest groups are concerned about ensuring that their natural environments and lifestyles are protected. It is therefore important to note that mass tourism and wine tourism are largely incompatible so that marketing of the latter has to seek approval and involvement from rural and local communities (Barber, Taylor & Deale 2010). The evolution of wine routes is discussed in the next section.

2.3.3 The evolution of wine routes

The genesis of wine tourism is wine roads (Bruwer 2003). The first wine route was inaugurated in 1934 by the Cote de Nuits wine-growing region and known as the ‘grands crus road’ in France. Subsequently, in 1935 the first German wine route was designated to assist and support the wine producers of the Palatinate region. Years later wine routes emerged in regions like Champagne and Alsace in France (Manila 2012).

It is vital that a wine route’s attributes are emphasised to distinguish it from its adversaries. Wine route associations tend to employ rhetoric that foregrounds the nature of their wines and the grapes they produce, the unique character of the soils and climate as well as the cultural heritage that cherished them. As such, a wine route can be described as a ‘tourist route’ (Bruwer 2003: 424) linking several wineries in a particular area (Hall et al. 2000). Wine routes are a blend of natural attractions, physical

attractions such as the facilities, vineyards and roads, and signs directing visitors to an individual wine route (Jago, Issaverdis & Graham 2000). Wine regions like Champagne (France) and Stellenbosch (South Africa) are branded by bounded space in the form of a wine region or a geographical indication. Thus, wine routes function as the roadways and linkages to the main attractions in wine tourism, namely the wines and the wineries (experiences, activities and events) (Hall et al. 2000).

The different identities of wine routes enable tourists to enjoy and appreciate the diversity of landscapes and winescapes when travelling between wine routes and wine regions. Therefore, it is very important for a winery, wine region or wine country to tap into aesthetic appeal and cultural heritage to ensure success, so affirming the development and emergence of wine routes as an essential and fundamental part of the wine tourism industry (Merret & Whitwell 1994).

Exploiting the cultural and historical background of a wine region assists in creating identity and marketing the wine product of a region (Alonso & Northcote 2009). Old-World wine regions have rich cultures connecting the wine, the winemaking process, traditions and lifestyles. The New-World wine regions have a different outlook regarding wine since the culture of wine is usually not as deeply rooted in the historical culture of these regions. In South Africa wine has been made for more than 350 years and there is a culture of wine. In Uruguay (South America) the influences of Algerian, Italian, Swiss, French, German and Spanish immigrants were clearly visible in the beginning stages of the emerging wine industry (Carrau 1997).

In South Africa the French Huguenot refugees of 1688 helped establish new wine-producing areas like Franschhoek (Demhardt 2003). Many of the New-World wine regions have cultural and historical links with Old-World wine regions. The French wine region of Beaune, Les Hospice de Beaune (an old charitable hospital), is a heritage attraction which benefits from being close to a wine region. In regions such as Burgundy in France, the villages are often named after the wines, so linking the age and the history of the wine with the wine route (Frochot 2000).

Clearly, the notion of a wine route can be interpreted as a cultural route playing a role in the overall strategy of regional tourism involving the organisation and marketing of a group of stakeholders including wineries, restaurants, museums and historical attractions. According to Alonso & Northcote (2009), the establishment of a dynamic wine route must include the resources of all regional bodies concerned. Visitors must be allowed the freedom to plan their own journeys from beginning to the end

and give them choices to pick the resources and activities they consider most interesting and attractive. Consequently, wine routes should not be stereotypical developments but allowed to display and incorporate unconventional ideas (Alonso & Northcote 2009). The efficient operation of a wine route demands an offering of numerous products, promotion of skill gains through knowledge transfer and the establishing of scale economies. The regional organisational structure can be either closed or open. The strategies and policies adopted can focus on the development of a single product focused on wine or they can include a broader range of products and services like accommodation, entertainment, transportation and events (Getz 2000; Vandecandelaere & Touzard 2003).

Consequently, wine route authorities can allow the association of wine with complementary activities such as food, architecture and heritage, sailing, mountain biking and golf (Frochot 2000). Such links are vital because it is improbable that wine alone will capture and hold the interest of tourists (Getz 2000). A wine route can be a powerful instrument for developing lasting relationships with customers. Furthermore, wine routes can create employment, stimulate economic growth, generate profitable investments and provide regional development opportunities (O'Neill & Charters 2000; Cambourne et al. 2000). However, in order to realise these it is important for winery management to be informed about and understand the behaviour and desires of their visitors (Hashimoto & Telfer 2003). By creating 'added value' for visitors, larger groups of visitors can be attracted to wineries and wine regions (O'Neill & Charters 2000; Preston-Whyte 2000). Although, wine routes produce benefits, their establishment demands substantial financial investments, especially in the beginning stages (Hall et al. 2000; Hall & Mitchell 2008). Overdevelopment of a wine route can impact negatively on the local populace (added pressure on local production and their environment), loss of cultural or rural identity, social exclusion, increase in real estate costs, loss of agricultural lands, increased traffic congestion, detrimental environmental impacts and alcohol abuse (Hall et al. 2000; Roberts & Hall 2001; Kirkman, Strydom & Van Zyl 2013).

The successfulness of wine routes as a rural development strategy requires cooperation among wineries and other stakeholders (Hojman & Hunter-Jones 2012). Unfortunately, undesirable experiences in some countries provide evidence that wine tourism and wine routes do not inevitably become good tools for rural regeneration (Gatti & Incerti 1997; Brunori & Rossi 2000). For example, Farinelli (2003) has cited the Chilean case where dramatic cultural change would be required because most of the wine owners and managers have extremely individualistic and anti-cooperation attitudes. Beyond the cooperation factor, the location of these routes (networks of wineries) in close proximity to potential

tourists (metropolitan areas) is a determining ingredient in the success of certain wine routes (Farinelli 2003). The next section explores applied theoretical models of the development of destinations.

2.3.4 Theoretical models applied to the development of wine routes

The tourism industry has the potential to significantly help overcoming underdevelopment. In many modern economies, a deteriorating industrial sector is failing to provide employment opportunities for unskilled workers originating from rural areas. In these circumstances the tourism industry shows promise as a substitute for creating job opportunities and generating income growth (Tooman 1997). Successful and responsible development rests on economic, social and environmental pillars. Various economic development models have been designed, applied, redesigned and analysed over the years. However, this section considers three models applicable to tourism development.

Miossec's time and space model

Although nearly four decades old, Miossec's (1977) model still plays a vital role in our understanding of the spatial development and growth of single nodes, facilities and resorts. The model illustrates the structural evolution in time and space of tourist regions. The original model distinguishes five distinct phases regarding changes that occur in the provision of facilities, resorts, transportation systems and tourist behaviour as well as local decision factors and the host population. The notion of space-time evolution is vital to both analysis of past processes and planning for development. This model is presented graphically in Figure 2.3.

Resorts phases	Transport phases	Tourists phases	Hosts phases
0 Territory Traversed Distant	0 Transit Isolation	0 Lack of interest and knowledge	0 Mirage Refusal
1 Pioneer resort	1 Opening up	1 Global perception	1 Observation
2 Multiplication of resorts	2 Increase of transport links between resorts	2 Progress in perception of places and itineraries	2 Infrastructure policy Servicing of resorts
3 Spatial organization of each holiday resort Beginning of a hierarchy and specialization of resorts	3 Excursion circuits	3 Spatial competition and segregation	3 Segregation Demonstration effects
4 Fully developed hierarchy and specialization Saturation	4 Maximum connectivity	4 Complete perception and visitation Departure of certain types of tourists Saturation, crises and substitution	4 Total tourism Development plan Ecological safeguards

Source: Sharma (2005:300)

Figure 2.3 Miossec's time and space model of tourist resort evolution

Butler's tourism area life cycle (TALC) model

According to Getz (1992) the notion of a destination life cycle has obvious potential to improve the theory and practice of tourism planning. A life cycle model is a useful conceptual framework for forecasting long-term changes and strategies for land use, economic development and marketing. However, the strength and universality of life cycle models have not been established yet, nor their usefulness in tourism planning. Gilbert (1939) and Christaller (1963) were the first to disseminate the concept of three stages of evolution in resorts, namely discovery, growth and decline. Butler's (1980) TALC model reformulated this simple model and expanded it to incorporate six unique stages that bear a closer resemblance to the contemporary concept of a product life cycle (Getz 1992; Rodríguez, Parra-López & Estévez 2007). Table 2.3 briefly explains each of the six stages identified by Butler (1980).

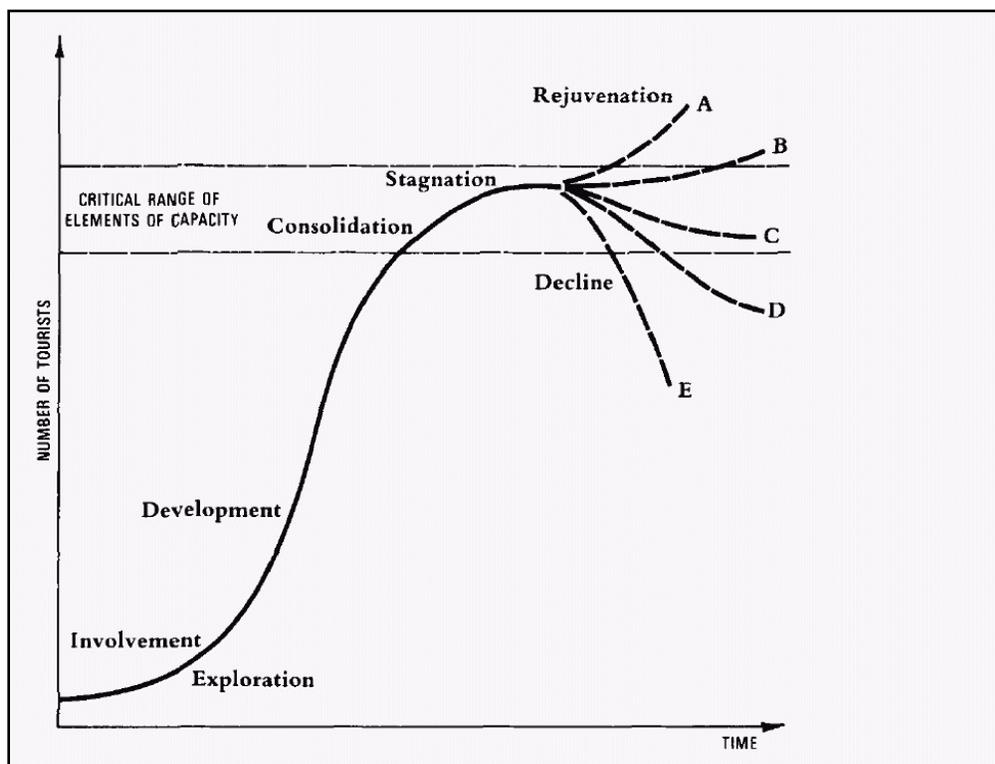
Table 2.3 Explanation of the tourism life cycle model (TALC) by Butler (1980)

Stage	Distinguishing characters
Exploration stage (1)	Limited and sporadic visitation by a few adventuresome (allocentric) people High degree of contact with locals and use of their facilities
Involvement stage (2)	Increasing visitation induces some locals to offer facilities primarily or exclusively for visitors Contact with locals has remained A tourism destination and season emerges; advertising is initiated
Development stage (3)	Outside investment is attracted to the destination Well-defined tourism market emerges Accessibility is enhanced Advertising becomes more intensive and extensive Local facilities are displaced by more elaborate and up-to-date ones, resulting in a decline in local participation and control Artificial attractions replace original ones Imported labour and auxiliary facilities and services become necessary to support the growing tourism industry
Consolidation stage (4)	The major portion of the local economy is tied to tourism Visitation levels continue to increase but at declining rates Marketing and advertising efforts are widened to extend the tourism season and attract distant visitors Older facilities are now second-rate and mostly undesirable
Stagnation stage (5)	Capacity levels for many relevant factors are reached or exceeded resulting in economic, social and/or environmental problems A peak number of possible visitations is achieved forcing facility managers to rely on repeat visitations and conventions for business Artificial attractions supersede the natural or cultural ones Destination not thought of as fashionable anymore Surplus capacity exists
Decline (6a) (first part of stage six)	Tourists are drawn away by newer destinations; those remaining are mostly weekend or day visitors Tourism facilities become replaced by non-tourism establishments, resulting in even less attraction for visitors Local involvement probably increases again as the price of facilities drops along with the market decline The destination either becomes a tourism slum or finds itself devoid of tourism activity
Rejuvenation (6b) (second part of stage six)	A dramatic change in the resource base is established Either a new set of artificial attractions is created or a previously unexploited natural resource is utilized

Source: Adapted from Tooman (1997)

Butler's (1980) illustration (Figure 2.4) displays the stages beginning with exploration then involvement, development and consolidation, ultimately leading to stagnation whereby the product can

either decline (E) or experience rejuvenation (A). An outcome (B-D) anywhere between these two extremes (A-E) is possible as new efforts and initiatives may not be very successful, or the decline may not be inevitable (Tooman 1997).



Source: Adapted from Butler (1980)

Figure 2.4 Butler's tourism area life cycle model

A particular destination will not necessarily precisely follow these stages in its development, however, various scholars have concluded that the TALC model has applicability and provides useful information and insights for consideration by destination managers (Tooman 1997). Moreover, exogenous and endogenous factors can significantly impact on a destination and there are numerous factors that can restrict growth. A strong argument against the destination life cycle model, as well as the standard product life cycle model, is that the evolutionary pattern of these models does not inescapably, nor even repeatedly, follow an organic path from birth through growth, decline and ultimately death. In the case of a basic product life cycle, the product remains unaffected while marketing initiatives and strategies adapt at each stage. Thus, if a product is changed, the cycle begins again. In the case of a tourism attraction the product, thus the destination, experiences an evolutionary process of frequent change in response to changes in demand and supply. Hence, any pattern is possible so that the life cycle concept is at best an analytical tool. Most researchers do not dismiss the model

since the first stage can be skipped. In the model, decline is a result of strains on the physical, economic or social dimensions of the particular region. These strains are meaningful as they signify endogenous factors (Tooman 1997).

This being said and given the focus of the research, the TALC model can be broadly applied to the development of wine routes since their evolution quite likely follows a natural developmental path as route membership grows and routes become increasingly popular with tourists. Nevertheless, it is important to bear in mind that some wine routes may skip the first few stages and may not precisely follow this evolutionary curve. Applying the last stages of the model can be difficult because to identify a wine route in the consolidation to decline stages requires records over a long period. Decline or stability hinge on a variety of exogenous factors like business fluctuations and trends, cost of additional locations or activities and random damaging events such as severe weather and its effects on local communities. An actual example is the decrease in tourist visitations in Lancaster County, Pennsylvania after 1978 was due to factors like these and not a decline in the destination itself, namely polio epidemic among the Amish people, the nearby Three Mile Island accident and the second oil shock in a decade that precipitated petrol shortages for travellers (Tooman 1997). Application of the model does not require controlling the effects and impacts, rather it stresses the prerequisite to consider relevant internal factors related to lasting viability. Debate on the model has tended to focus on its validity, its possible applications and the factors affecting the evolution of resorts.

According to Debbage (1990) most of the references to the life cycle of resorts concentrate on visitor numbers and capacity issues thereby suggesting that visitation declines as resorts reach capacity. These contentions are debatable, partly due to the manifold understandings of the term 'capacity' and the various methods for dealing with capacity thresholds (Getz 1992). Cooper & Jackson (1989) noted that the cycle can also be applied to the expansion and development of facilities and organisational constructions so that there is no single measure that effectively encapsulates all phases of resort evolution or confidently establishes the current stage of a resort in the TALC model. It is important to keep in mind the evolutionary curve proposed by Butler's (1980) TALC model as a background to understanding the natural evolution of a product or resort in research on wine routes. The TALC model provides a good basis for investigating the evolution of wine routes through various life-cycle phases. Miossec's model also illustrates the physical development of a single winery node in time and space into multiple resorts. Both models form the foundation of this case study of South Africa's wine routes. But attention must also be directed toward the model of Dodd & Beverland (2001) specifically aimed

at the life-cycle phases a winery goes through. The study's conceptual foundation rests on the models of Miossec (1977) and Butler (1980) but Dodd & Beverland's (2001) model goes a step further than they do. This makes it worthwhile to consider.

Dodd and Beverland's winery life cycle model

Various factors hinder wineries from getting involved in wine tourism, for example legal, financial and management issues that cause wineries to never show interest in tourism development (Dodd & Beverland 2001). Moreover, the general life cycle view stating that every winery should progress through a fixed development path is not supported by empirical evidence (Greiner 1972; Van de Ven & Poole 1995). Consequently, Dodd & Beverland (2001) inductively derived a model based on three case studies in the wine tourism literature. The use of life cycle theory supports Cooper's (1992) belief that life cycle models provide researchers with a useful structure for understanding wine tourism development. Hanks et al. (1993: 6) suggested that a valid life cycle model could:

...provide a road map, identifying critical organisational transitions, as well as pitfalls the organisation should seek to avoid as it grows. It could help management know when to "let go" of cherished past strategies or practices that will only hinder future growth. Recruitment of critical skills could be timed to coincide with organisational needs.

Dodd & Beverland (2001) contend that an effective life cycle model of wine tourism should be able to identify when certain activities are valid and when others are not. For instance, considerable dependence on cellar door sales is typical of many small start-up wineries (as discussed earlier) but additional growth and success may hinge on creating broader channels of distribution. Beverland (2000) found the reality of a life cycle in the wine industry of New Zealand where he observed small wineries and evaluated tourism activities in the context of an organisation's development over time. When Beverland (2000) considered wineries intent on future growth he found that over the first eight years they progressed from a preliminary distribution focusing on the cellar door to a strategy to establish broader distribution channels and export markets. Consequently, wineries did not have to rely on cellar door sales for survival although they may have retained an interest in wine tourism events that initially related to brand and image building, and to educating consumers.

Similarly, Halliday (1999) focused attention on the numerous stages of development where discussing the development of tourism in the Napa Valley as well as in many regions in Australia. Halliday (1999)

claimed that discounting planning and monitoring of the environment led to the adoption of draconian measures in the Napa Valley because of tourism congestion. With new planning systems in place, the potential decline in tourism had been 'arrested' and the spotlight moved to upmarket visitors. Halliday (1999) also referred to the example of the Hunter Valley, a region that experienced growth in winery numbers (23 and one restaurant in 1979) to more than 80 wineries and various other facilities, accommodations and numerous shopping opportunities two decades later. It is evident that movement away from specialisation toward diversification and network development supports the life cycle literature (Greiner 1972).

Nevertheless, Dodd & Beverland (2001) have acknowledged that there has been little research on and analysis of the concept of a life cycle model in wine tourism. Dodd & Beverland (2001) suggested a simple four-stage life cycle model as a general framework to present the life cycle of wineries, always bearing in mind their inimitable circumstances. The first stage, *start-up* is characterised by cellar door sales used for survival and the notion of wine tourism adopted to increase the sales of the winery. The second stage, *growth*, refers to an increase in production and the development of events to boost brand awareness. The third stage, *expansion*, involves an increased focus on exports and high brand recognition as well as the development of cross-promotional material. The last stage, *future*, sees wine tourism increasing due to competition and cellar door sales playing only a small part in overall sales. However, Dodd & Beverland (2001) went on to develop a more complex five-stage life cycle model (see Table 2.4). The process is consistent with grounded theory (Strauss & Corbin 1990). Dodd & Beverland (2001) grounded their model on general tourism development theory (Miossec 1977; Plog 1991; Goeldner, Ritchie & McIntosh 2000) and specific winery tourism literature (Macionis 1997; Beverland 1999; Getz et al. 1999). Dodd & Beverland (2001) singled out a list of factors which relate to individual wineries or wine regions undertaking or progressing through development. The list incorporated both internal and external factors concerning individual wineries. The external elements consist of the types of tourism and visitors that characterise each stage, media coverage, community responses and the networking measures between wineries and other tourism bodies. The factors that are internal to the winery are wine pricing and sales.

Table 2.4 The wine tourism life cycle model

	STAGE 1 Winery establishment	STAGE 2 Winery recognition	STAGE 3 Regional prominence	STAGE 4 Maturity	STAGE 5 Tourism decline
Type of tourism	Rural tourism	Industrial tourism	Special-interest tourism	Entertainment, festivals and events	Bargain hunting
Visitors	Unintended visits	Connoisseurs	Aspiration and Connoisseurs	Beverage wine drinkers	Beverage and new wine drinkers
Facilities	Few facilities	Basic facilities	New facilities	Status quo on facilities	Some tourism facilities closed
Community	Local community awareness	Community pride	Community support, especially by applied industries	Growing resentment	Disillusionment with winery tourism
Networks	Little or more	Some tentative relationships developing	Public and private co-operating	Status quo Warning interest in new projects	Little co-operation
Sales and pricing	Tasting room Mailing list Bargain pricing	Tasting room Restaurant Boutique pricing	Major retail outlets Moved to fixed-price 'channellers'	Major retail outlets Convenience stores 'channellers' Winery meets retail needs first	Only 'excess' product available at the winery
Size and structure	Small production Simple structure	Increasing production Specialised functions starting to emerge	High levels of production Functional departments	Increasing production Bureaucracy emerging	Level of production declining Bureaucratic
Strategy	Establishment	Production and quality	Build distribution network	Defending	Revitalisation
Cellar door	Survival	Brand awareness	Brand enhancement	Increased percentage of sales	Survival
Brand awareness	Unknown	Becoming known	Known locally and internationally	Needs enhancement	Negative
Media	Largely unknown	Wine press Some general media	Wine press and general media interest strong. International recognition	Media saturation	Media coverage difficult to obtain

Source: Adapted from Dodd & Beverland (2001)

Many wineries will not necessarily go through all of these stages of development. For example, small wineries can remain focused on the cellar or just a place which sells wine to local people. Thus, the owners of small wineries may never develop the desire or need to develop on a larger scale, so suggesting that the winery remains in stages 1 or 2 for several generations.

Butler (1980) emphasised that areas could be invigorated and energised and this would ultimately stop the path to the inevitable decline of the region or specific attraction. By adding new attractions or innovating existing products, new visitors will be attracted and constant updating of the region will occur (Dodd & Beverland 2001). Numerous wineries have done a superb job in finding new things and activities to interest visitors, for example mountain biking and exclusive culinary experiences. In this way a wine area will evolve and remain interesting and stimulating to visitors, so ensuring that tourists will make return visits. Butler (1980) does admit that by virtue of their uniqueness will survive any level of visitation. Such an area has something so special that no matter how developed it becomes visitors will always find a reason to visit.

This five-stage model provides a framework to examine wine tourism and to illustrate what can happen over time to a wine region or individual winery. Dodd & Beverland (2001) argue that some wineries may move much quicker than others through the life cycle stages. In effect, the establishment of new regions and increased competition, winery start-ups and improved tourism attractions can lead to wineries skipping stage 1 and moving directly to stage 2 in order to create a reputation with consumers.

The next section discusses the importance of the wine tourism industry in creating job opportunities, promoting regional development and supporting local communities. The sub sections look at the relationship between the local communities and the wineries, and the wider impacts of wine tourism development.

2.4 SOCIAL RESPONSIBILITY AND OTHER DEVELOPMENT IMPACTS

This section focuses first on the various definitions of corporate social responsibility (CSR); second on the potential positive and negative impacts of wine tourism; and third on the wider impacts of wine tourism development in terms of community support and regional development.

CSR is a comprehensive concept for which the literature uses a variety of definitions. Carroll (1979) has defined CSR as the social responsibility of businesses to encompass the economic, legal, ethical and discretionary (philanthropic) expectations that society has of organisations at a given point in time. The World Business Council for Sustainable Development (1998) defined CSR as the continuing commitment by businesses to behave ethically and contribute to economic development while simultaneously improving the quality of life of their personnel and their families as well as of the local

community and society. McWilliams & Siegel (2001) emphasised that CSR reflects moving beyond the requirements of the law. Lantos (2001) styles CSR as having three basic goals, namely ethical, altruistic and strategic. The European Commission (2002) defined CSR as a conception of companies integrating social and environmental concerns in their business operations and in their interactions with their stakeholders on a voluntary basis. Thus, CSR involves voluntary integration of social and environmental initiatives into a company's decision making and shared interactions with stakeholders (Enquist, Johnson & Skalen 2006). As Reich (1998) has pointed out, the question is not whether companies should be responsible to society or not, rather *how* they should be responsible (Sharma & Vredenburg 1998). Many authors view CSR as a practical business philosophy and an active marketing tool to compete and maintain competitive advantage (Chahal & Sharma 2006). These definitions of CSR show that being socially, environmentally and economically responsible is a vital and essential aspect of running a business.

Despite much research on CSR and companies' environmental strategies, it remains uncertain why some organisations adopt social and environmental practices and others not (Delmas & Toffel 2004). Some authors highlight the strategic factors of CSR, such as competitive advantage, differentiation strategy, entry into the market, positive corporate image (reputation), and product and service quality (Bhattacharya & Sen 2004; Marshall, Cordano & Silverman 2005; Tullberg 2005; Bhaskaran et al. 2006). Others describe economic drivers, such as cost savings, greater efficiency and increasing profit (Marshall, Cordano & Silverman 2005; Munilla & Miles 2005; Bhaskaran et al. 2006).

Therefore, the social aspect of good CSR concentrates on addressing social issues beyond a company's walls. This can include any form of donations from the business itself or other foundations. Good CSR also rests on support from employee volunteer programmes and donations in the form of products, services and housing. Working in collaboration with other sectors can build sustainability in the long term, predominantly in important areas such as health and education (Krige 2005). This research pays attention to the impacts of CSR in the wine and wine tourism industries. The next section therefore looks at the potential positive and negative impacts of wine tourism development.

2.4.1 Positive and negative impacts of wine tourism in rural areas

Local communities and rural development are key concerns for governments and local authorities around the world (Alonso & Liu 2010). The increasing global evolution of tourism, along with its many facets, allow communities to benefit from the industry. Furthermore, tourism has various potential

benefits for local communities by creating job opportunities and generating revenues in these areas (Jones 1993; Williams 2001). Global economic reform, agricultural changes, environmental stresses, farm incorporation and development of new technologies all add to changes in rural economies all over the developing and developed world. These changes place substantial economic stress and pressure on local communities, leading to social dislocation, where the traditional social interaction and cultures of these local communities have revolved around traditional agricultural activities (Alonso & Northcote 2008; Alonso & Liu 2010). According to Alonso & Northcote (2008) rural communities have begun to look to other markets as potential economic substitutes.

Wine-grape farmers can interact with their local communities in various ways. This interaction includes support given to the local community by ensuring job opportunities and guaranteeing a local market for their wine. Support includes sponsorships, donations, civil partnerships, promotion projects and philanthropic partnerships (Alonso & Northcote 2008; Alonso & Liu 2010; Hughes & Scheyvens 2016). There is, however, a boundary that should not be overstepped, namely an understanding of the difference between giving support to local communities and such support being misunderstood by the local community as forms of charity. Some communities support development in their areas because extra development can provide improved and new infrastructure, grants and loans to attract potential businesses. Such circumstances can lead to a situation where both parties benefit: “when businesses prosper, the quality of life in the community will better...a high quality of life in a community will result in more prosperous businesses” (Alonso & Northcote 2008: 144). According to Madden, Scaife & Crissman (2006) engagement and involvement of expertise, skills and produce from the local community can help businesses to increase their sales. For that reason, interactions between the local community and rural businesses are essential (Hughes & Scheyvens 2016).

The development of tourism in rural areas is an initiative widely accepted around the world as a way to revive rural communities and their interaction with wineries. The involvement of local communities in tourism activities can engenders environmental, economic and cultural benefits for the communities. Of course, the opposite situation can arise, as documented in numerous studies, of tourism being disadvantageous (Simpson 2008). The combination of tourism and agricultural products has involved the interest of local organisations as an approach to developing rural areas (Alonso & Northcote 2008).

The expansion of wine farming and wine tourism presents opportunities to rural areas so that the effective implementation of responsible production and wine tourism activities in rural areas remains

a challenge. For example, the growth of the local wine industry in some regions, including Napa Valley in California, has created negative environmental impacts like increased traffic flows and a “shift in sense of place” (Griffith 2007: 18). In some rural areas of New Zealand prices of rural properties have increased (Law 2007; Nikiel 2007). Wine production that recruits outside labour to match increasing demand (Beer & Lewis 2006) can affect local communities and their resources (Gibson & Weinberg 1980; García Fernandez 1999; Arfini, Bertoli & Donati 2002).

2.4.2 Wider impacts of wine tourism development

Tourism trends, such as agritourism (Sharpley 2002; Langworthy, Howard & Mawson 2006; López & García 2006; Pulina, Detton & Paba 2006), rural tourism (Jones 1993) and wine tourism (Hall et al. 2000; O’Neill et al. 2001) have brought new incentives and energies to rural areas, often stimulating community involvement (Choi & Sirakaya 2006; Ballesteros & Ramírez 2007). The wine product has been recognised as a contributor to such developments in rural areas (Hall & Macionis 1998). Wine and food festivals can promote a local community’s tourism resources and help develop regional identity as well as offer an array of activities (Inbakaran & Jackson 2005).

Charters & Ali-Knight (2002) have discussed some distinctive experiences offered in wine regions, namely train rides through wine country, tours of wine production facilities, vineyards and cellars, and tours of the Roman caves used as wine cellars or museums (Inbakaran & Jackson 2005). California’s Napa Valley and Chile’s Colchagua Valley both offer train rides through beautiful wineland scenery and other wine experiences. These add-ons to the wine tourism experience provide exploit unique themes but also contribute to building collaborations and adding activities to attract more visitors. Wargenau & Che (2006) have explored the efforts of wineries situated along wine routes to establish vertical relationships with local hospitality and tourism operators. Such efforts can help to establish wine regions as true destinations (Getz 2000; Hoogterp 2003; Wargenau & Che 2006). Benefits derived from the effective and successful implementation of wine tourism include business growth, generation of job opportunities, sale of local products, drawing visitors into rural areas and making opportunities for corporate investments (Morris & King 1998; Hall et al. 2000; Telfer 2001; Arfini, Bertoli & Donati 2002; Mitchell & Hall 2006).

Despite the positive outcomes and benefits deriving from wine tourism, many wine growers do not regard wine tourism as an alternative economic activity or diversification of their farm economy and they see its implementation as posing major challenges (Dodd 1995; Beverland 1998). The latter

involve expenses to develop hospitality facilities, work-related health and safety issues and a lack of direct benefit to growers (Fraser & Alonso 2003). For local communities in certain areas the outcomes of wine tourism have been unfavourable, even negative such as overdevelopment of rural areas, increased water usage, increased traffic during the harvesting season and tensions caused by sourcing outside labour (Tesconi 1999; Beer & Lewis 2006; Griffith 2007). Consumers are generally more aware of the environmental issues, even those related to wine production. Many wine operators and wine farmers who produce wine and provide opportunities for wine tourism activities, seem to comply with environmental procedures, although this relate to legal duty rather than being truly concerned about the environment (Marshall, Cordano & Silverman 2005). A balance must be found in wineries and rural regions between wine tourism development and minimising the potential negative impacts this industry can have. The distinctive characteristics, surrounding scenery, local foods and authentic experiences offered by wine regions form the vital foundation for the successful implementation of wine tourism. Therefore, all development has to be sensitive toward the environment and the local cultural heritage, and it must tap into the sense of place of a particular area.

To contextualise the development of wine tourism in South Africa, it is necessary to introduce the history and the geographical milieu of South Africa's wine industry and wine tourism. This is done in the next section.

2.5 WINE TOURISM IN SOUTH AFRICA: THE WIDER CONTEXT

This section first, discusses the history of the South African wine industry; second, it examines the singular geographical features that make South Africa suitable for wine production; and third, documents the development of 19 of South Africa's wine routes.

2.5.1 History of the wine industry in South Africa

South Africa is a relatively new player in international wine markets owing to the recent (re)opening of its export markets after its political transition to the post-apartheid regime in 1994. Historically, the wine industry of South Africa dates back to 1659 when Jan van Riebeeck tasted the first glass of wine produced locally (Demhardt 2003). By 1679 Simon van der Stel, a Dutch governor, planted the first wine grapes in the Constantia area and later in the Stellenbosch region. In the 1680s French Huguenot refugees arrived, bringing their familiarity with the making of wine and brandy. By this time South Africa's wine future was set. In the early 19th century, wine represented almost 90% of all exports from the Cape Colony to Europe. However, the removal of the United Kingdom's preferential tariffs

in 1825 threw the industry into depression (Vink, Williams & Kirsten 2004; Ponte & Ewert 2009). By the mid-19th century exports had almost collapsed because of a trade agreement between the United Kingdom and France in 1861 (Ponte & Ewert 2009). Following recovery in 1885 from the damage to the winelands by the phylloxera louse, wine production seemed to be slow by 1918 (Swanepoel & Bailey 2008). This led to the founding of the Koöperatiewe Wijnbouwers-Vereniging (KWV) in the early 20th century. KWV had the role of controlling the sales and the removal of products of its members in a way that always assured them of an acceptable income for these products. By 1924 KWV had matured further and become very influential. During this time the Wine and Spirit Control Act No. 5 required all the wine farmers to join KWV and authorised the farmers to set minimum prices for the distillation of wine (Hands & Hughes 1997).

By 1940 KWV had grown further in size and influence through the Wine and Spirit Act No. 23 which required a permit to be obtained from KWV to produce wine. Thus, all transactions between wine producers and sellers were sanctioned by KWV. Legislation in 1956 allowed KWV to apply a quota system to vineyards that restricted the number of vines planted on each piece of land (Robinson 2006; Swanepoel & Bailey 2008). This meant that only vineyards that had the quota could produce grapes and make wine (Preston-Whyte 2000). Legislation introduced in 1973 was specifically designed to ensure quality control. This gave the Wine and Spirit Board had authority to validate the claims on the wine label regarding vintage, cultivar and area of origin. By the late 1980s, exports fell to an all-time low because of economic sanctions against South Africa and the KWV having a monopoly on all exports of wine. When sanctions were lifted in the early 1990s, very few South African wine grape growers or cellars had any experience of foreign markets. The dominant influence of KWV until the early 1990s had not encouraged entrepreneurial innovation in the wine industry, even though the objective of regulatory overproduction was certainly well intentioned. When apartheid ended the wine industry was liberated from control by the state (Robinson 2006; Swanepoel & Bailey 2008) although the quota system had been abolished already in 1992. The abolishment pushed wine producers to enter the market place so that between 1992 and 1999 the number of wine producing cellars grew by 52%. The wine producers were divided into three groups. First, estate wineries which produced wine from the grapes grown on the estate itself. Second, cooperatives which produced wine from grapes grown by cooperative members. Third, independent cellars which bought both grapes and wine, and produced wine for bottling under their own labels and brand names. The period between the mid-1990s and the early 2000s was characterised by the renaissance of the industry that took place following the opening of international markets, the (relative) novelty of South African table wines and a weak ZAR. Although

South Africa was playing catch-up with countries like Australia and Chile, wine exports grew (Swanepoel & Bailey 2008).

When the ZAR had strengthened by 2005, there was a glut of red wine on the global market, although the outlook had begun to change. In 2006 the wine industry witnessed decreasing exports, some bankruptcies and a general decrease in profitability and competitiveness. Signs of recovery were detectable in 2007 and 2008 with a new weakening of the ZAR (Demhardt 2003; Ponte & Ewert 2009). The slow recovery of the world economy after the global downturn (2008 to 2010) led to strong competition in the United Kingdom market between wine from South Africa and its rivals (Australia, New Zealand and Chile). The implication of the new Economic Partnership Agreement between the EU and Southern African Customs Union (Namibia, Lesotho, Swaziland, Botswana and South Africa) is that South Africa can, from 2016, export 110 million litres of duty-free wine to EU countries (up from 48 million litres). In mid-2016 (June) the United Kingdom decided to move out of the EU (Brexit) so that South African wine exports now face new and unknown challenges (Maseko 2016).

The most significant growth in the number of wine producers has been in the Stellenbosch, Franschhoek, Helderberg, Paarl and Walker Bay regions (Swanepoel & Bailey 2008; Ponte & Ewert 2009). The significant increases in the number of wineries gave the inquisitive visitor a variety of options. Today, South Africa is the eighth largest producer in the global wine business and it is important for wine imports into selected countries (Preston-Whyte 2000; SAWIS 2016). The EU region accounts for 75% of the South African annual offshore wine sales, of which the UK takes a third. The total value of these wine exports is five billion ZAR (US\$ 357 million) (Maseko 2016). The overdependence on the EU as export destination exposes an Achilles heel of the South African wine industry to such an extent that Wines of South Africa (WOSA) has embarked on a major marketing effort to open other markets, especially in Asia (Maseko 2016).

The South African wine industry is one of a few national industries that is predominantly (excluding the Constantia area) concentrated outside metropolitan areas, hence a vital role player in regional development, employment generation, corporate investment, business growth and tourism (Bruwer 2003). Wine is the core product and important activities are associated with it such as wine tourism and wine-region brand building. The South African wine industry is becoming increasingly dependent on leisure and tourist visitors to sustain the growth of local and export sales regarding immediate

turnovers by over-the-counter sales and long-term image creation (Demhardt 2003; WOSA 2016). Figure 2.5 is a pyramid of stakeholders in wine production and wine tourism in South Africa.

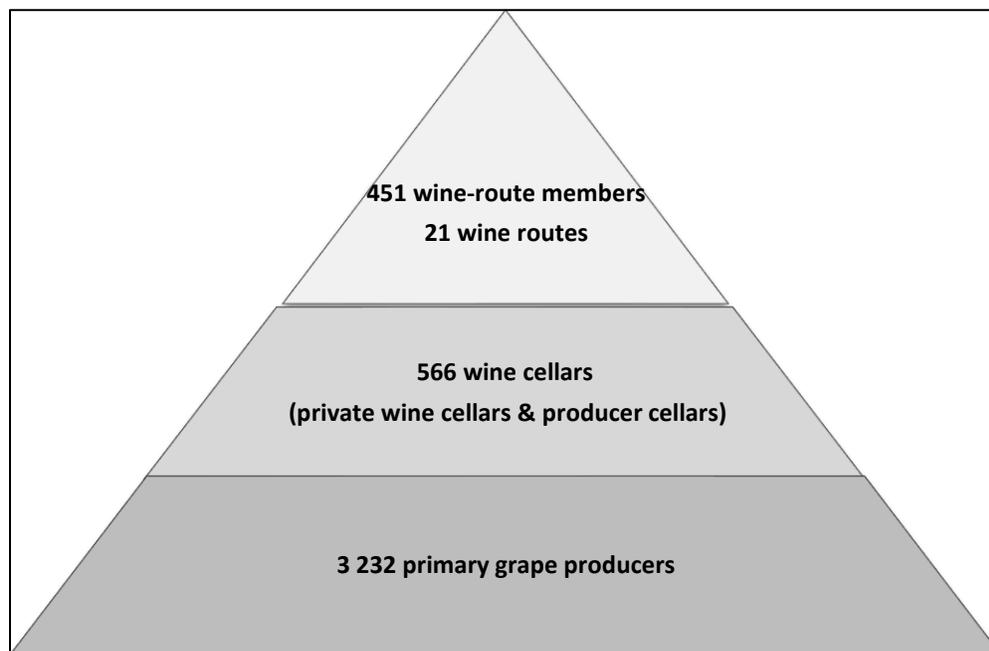


Figure 2.5 Wine industry stakeholders in South Africa

There are currently some 3232 primary South African grape producers with roughly 566 private and producers wine cellars and about 451 wine-route members. Section 2.5.1 detailed the history of South Africa's wine industry. The next section examines the distinctive geographical features of South Africa's wine industry.

2.5.2 The peculiar geographical features of South Africa's wine regions

The constant interchange between mountains, ancient geology, coastal breezes and valley slopes in the South Africa winelands results in an extraordinary biodiversity, which is reflected in our indigenous flora. With more than 10 000 plant species, 70% of which are endemic, the Western Cape is recognised as the smallest and the richest of the world's six great floral kingdoms. The conditions which support this remarkable biodiversity can, in turn, support a large spectrum of wine varieties and styles (Aspect 2015). Most of the Cape's grape growing regions are influenced by the Atlantic and the Indian oceans, which meet at this southernmost tip of Africa. Section 2.5.2 looks at the terroir (section 2.5.2.1), topography (section 2.5.2.2), soil (section 2.5.2.3) and climate (section 2.5.2.4) specific to South Africa's wine regions.

2.5.2.1 Terroir

The concept terroir involves topography, climate, geology, soil, and is the basis of many geographical indication systems, including the Wine of Origin (WO) system in South Africa. The distinct diversities in South Africa's vineyard and wine landscapes is considered a valuable asset and demarcation of areas of origin are rated highly important by the industry (Carey 2001). The identification of viticultural terroir is receiving much attention worldwide where it is backed by an increasing demand by consumers for knowledge and understanding of the origin of each wine produced. In South Africa, as in many New-World wine countries, wine producers are giving meticulous attention to identifying and selecting sites best suited to particular grape varieties (Aspect 2015; Ponte 2009).

2.5.2.2 Topography

One of the natural features of the South African vineyard and wine landscape (winescape) is the distinctive and diverse topography, characterised by sandstone mountains, often resting on granitic foothill bases which merge into undulating shale substrata hills (Wooldridge 2000). Closely linked to geology, topography forms an important part of the terroir concept, and it has a strong interaction with the environmental components of climate and soil (Saayman 2002). Its effect, both below and above the ground, is one of the major factors governing the quality of the grapes, with altitude, aspect and inclination of the slope being the three most important attributes affecting viticulture. Topographic effects can be indirect due to soil types, exposure to wind and ventilation, or direct due to the immediate effects of the incidence of the sun's rays on the earth's surface (Carey 2001). The varied vineyard terrain of the Cape not only offers a wide range of locations but also many different mesoclimates and soils in which to grow the various grape varieties. With increased knowledge of the vines' needs, many farmers have extended their plantings upslope to benefit from better drainage and lower temperatures (Schultz 2004). Vineyards are located at a mere 50 m above sea level to higher than 600 m in the mountains (WOSA 2016). This feature is often used to differentiate between wine styles of the same variety or to plant several varieties with different climate requirements on the same farm. Regarding aspect, in the southern hemisphere preference is given to the cooler southern and eastern slopes, especially for the more delicate varieties like Sauvignon Blanc and Pinot Noir (Mouton 2006). Changes in altitude result in different slopes and aspects, with resulting changes in the interception of solar radiation, temperature and wind exposure. Northern and western slopes are warmer than southern and eastern slopes due to the formers' higher interception of sunlight. Eastern slopes do, however, warm up faster than western slopes and cool earlier (Gladstones 1992). During the summer months the sun

rises late and sets early behind the peaks in the prime wine producing vineyards in the mountainous terrain of the Cape that casts deep shadows over the vineyards on the mountain slopes in the early morning and late afternoon, thus restricting the number of sunlight hours (Carey, Archer & Saayman 2005).

2.5.2.3 Soil

Various weather cycles and several periods of inundation by the sea, together with the pronounced and varied geography of the Western Cape, gave rise to a great soil diversity over short distances (Carey 2001). In the coastal zone the general pattern is sandstone mountains, often resting on granite intrusions surrounded by shale at lower altitudes, whereas farther inland shale parent material and river deposits usually predominate (Mouton 2006). The highly regarded reddish and yellowish brown soils are usually associated with granitic hills, for example the Bottelary, Malmesbury and Darling hills, and the granitic footslopes of the sandstone mountains, including Table Mountain, Stellenbosch Mountain, and the Hottentots Holland Mountains, Helderberg and Simonsberg. These soils at altitudes of 150-400 m, often on steep slopes, are relics of a past, high rainfall, tropical era (Lanz 2004). They are highly weathered and acidic, stable and well drained, with a good water-holding capacity. Other soils that formed on granite occur on gently undulating hills between the mountains and the sea at 20-150 m altitude. This zone was invaded several times by the sea due to land recession and uplifting. The soils are generally duplex in character, consisting of coarse bleached sand and often also yellow brown gravel or ferricrete on wet (gleyed) clay. Extremes in wetness and drought in these soils curtail vigour. The generally consistent performance of vines on these soils over seasons, especially when coupled with good exposure to prevailing cool sea breezes, ensures good quality wines (Mouton 2006; Aspect 2015).

2.5.2.4 Climate

In South Africa viticulture originated and still mainly takes place at a latitude of 27-34° south in an area with a Mediterranean climate. The Western Cape is cooler than its position suggests, with conditions that are ideal for growing a wide range of noble wine varieties. The traditional winegrowing areas along the coastal zone are seldom more than 50 km from the ocean and experience beneficial coastal conditions, especially cool sea breezes (Aspect 2015). The temperate climate features warm summers and cool winters, with frost rarely a problem. Rain falls mainly between May and August, and diminishes in a northerly and north-westerly direction, caused by the cold Benguela Current along

the west coast and the prominent mountain ranges which follow the coastline, making irrigation essential in these areas (Saayman 1997). Temperature is probably one of the most important factors affecting the grapevine as it has an effect on almost every aspect of its functioning. Temperatures follow an inverse pattern to rainfall, increasing in a northerly direction and with distance from the sea. The vineyards lie on the valley sides and mountain foothills, benefiting from the many different mesoclimates offered by the mountainous terrain and diverse terroirs. There is constant interaction between the rugged peaks, the multidirectional valley slopes and the proximity of two mighty oceans, in particular the Atlantic, chilled by the icy Benguela Current which flows northwards along the west coast of Africa from Antarctica, which moderate the summer warmth. The next section turns to the history of South Africa's wine tourism industry and the evolution of its 21 wine routes (Mouton 2006).

2.5.3 The history of wine routes in South Africa

The birth of the first wine route in Stellenbosch in 1971 was when Frans Malan of the Simonsig Estate got the idea of developing wine routes in South Africa after he had toured the Route de Vins at Morey St Denis in Burgundy (Du Plessis & Boom 2008). Neil Joubert, owner of Spier Estate and Spatz Sperleng, owner of Delheim Estate supported Malan. The three men, labelled 'The three angry men with a cause', decided to fight the government for changes in the liquor law to allow wineries to offer tastings of their wine on their estates. Following a lengthy process the liquor law was changed and this led to the establishment of the Stellenbosch Wine Routes. This led to the emergence of other wine routes as wine producers outside the Stellenbosch area recognised the benefits of wine route tourism (Frandsen 2005). Wine producers and wine route associations collaborated to 'supply' the public with wine routes as the great demand grew for wine tourism activities and experiences. The success of wine routes rests much on the manner in which the demand for estate wine and wine tastings is accommodated. The wine route experience was broadened by more wine tastings, wine, tourists travelling in groups and the 'idea' of a wine route or images that represent the ideas of discovery and exploration. The Cape wine routes offer a variety of natural and cultural landscapes (Preston-Whyte 2000).

First-time visitors to Cape Town rank two activities very highly, namely riding the cable car to the top of Table Mountain and visiting the winelands (WOSA 2016). Consequently, in the Western Cape "wine defines the place" (Preston-Whyte 2000: 114). Over the years the wine routes in the Western Cape have come to offer much more than just tasting facilities. It is widely recognised that the Cape

winlands are probably the most scenic in the world (Winkler 2012; Ferreira & Muller 2013) and hospitality arrangements for tourists are becoming more and more sophisticated, including five-star accommodation establishments and award-winning restaurants. Scott (2004) report on the commercialisation and commodification of wine products. Commercialisation and commodification with regards to wine tourism can be understood as agents of organisational change at farm level. Traditionally, wine farms are involved in the production (primary and secondary activities) and harvesting of wine grapes and the making of wine. Nevertheless, the adding of commercial developments (for example restaurants, shops and accommodation) and the commodification of farm resources or features (for example historical buildings, hiking trails and venue hire) resulted in wine farms not only changing their production orientation by adopting these tertiary and quaternary retailing and service activities, but also expanding their wine farm to become places of consumption (Scott 2004).

Currently there are 21 official wine routes in the Western Cape and Northern Cape provinces with the majority located roughly 100 km from Cape Town (WOSA 2016). In the Coastal and Olifants River Region the routes include Darling Wine Route, Namaqua West Coast Wine Route and the Santam Swartland Wine and Olive Route. The Breede Valley Region includes Breedekloof Wine Route, Franschhoek Wine Route (Franschhoek Vignerons), Stellenbosch Wine Routes, Paarl Wine Route (Paarl Vintners), Robertson Wine Route, Tulbagh Wine Route, Wellington Wine Route and the Worcester Wine and Olive Route. The Cape South Coast Region includes Bot River Wine Route, Elgin Valley Wine Route, Hermanus Wine Route and the Stanford Wine Route. Lastly, the Klein Karoo Region includes the Plettenberg Bay Wine Route and the Klein Karoo Wine Route. The Constantia and Durbanville Wine Route is situated in the Cape Town Metropolitan area and is not part of a larger region. There was also no route identified in the greater Karoo Region (WOSA 2016).

Stellenbosch Wine Routes is the oldest and the most established (in terms of members) wine route in the Western Cape with Paarl Wine Route and the Franschhoek Wine Route in the next two positions. The Stellenbosch Wine Routes is located in the wine-growing region of Stellenbosch and the route covers 85% of the vineyards in the region (Frandsen 2005). In 2010 Stellenbosch Wine Routes covered a significant 17% of the total vineyard footprint in South Africa. Stellenbosch Wine Routes is world renowned, comparing favourably with well-known wine routes, such as the Napa Valley in California and Bordeaux in France (Kirkman, Strydom & Van Zyl 2013). Wine tourism is an asset in South Africa's economy, and adds to the country's desirability as a holiday destination. The South African

wine tourism industry is constantly evolving to meet the challenges of competing in a global market. A winery visit is no longer just about tasting and enjoying wines, rather the experience has been expanded to include an array of offerings that appeal to a broader range of tourists, such as restaurants, festivals, outdoor activities and other unsurpassed attractions. South Africa's wine routes are thus the link between our wines and consumers (Bruwer 2003; Frandsen 2005; Ferreira & Muller 2013; Kirkman, Strydom & Van Zyl 2013). For tourists with a cultural taste the landscapes of the winelands boast well-conserved Cape Dutch architecture and other attractive heritage superstructures like churches, farmhouses, town halls, wineries, museums and mission stations (Ferreira 2007).

South Africa has various stakeholders to develop the wine industry locally and to be competitive in the global market. *WOSA* is an organisation that represents all South African wine producers who export their products. *WOSA's* mandate is to promote the export of all South African wines in key international markets as well as to contribute to the global success of the South African wine industry through building Brand South Africa (*WOSA* 2016). *VinPro*, the service organisation for 3660 South African wine producers and cellar members, strive for their commercial sustainability as well as that of the broader producer industry and its strategic role players. *VinPro* represents its members at all relevant forums and in dealings with the government. The organisation concentrates on maintaining close relationships with government and wine industry role players representing more than 40 organisations and committees. *VinPro* promotes the interests of its producers regarding issues such as statutory levies, customs and excise duties and new legislation (*WOSA* 2016). *Wesgro* is the official tourism, trade and investment promotion agency for Cape Town and the Western Cape. Since 1982 *Wesgro* has contributed to developing the Western Cape economy, creating an average of 3000 jobs per annum, facilitating, foreign and local investments, assisting local companies in exporting to foreign markets and establishing strategic relationships across the globe. *Wesgro's* vision is to grow the economy through tourism, trade and investment opportunities to benefit the people of the Western Cape (*WOSA* 2016). Finally, the *South African Wine Routes Forum* consists of the managers of all the wine routes. South Africa boasts a well-established network of twenty diverse and well-run wine routes.

According to Scott (2010), South Africa's wine tourism industry is still in a relatively immature stage, or 'infancy' stage, even though South Africa has been producing wine for more than 350 years. In comparison to other New-World wine countries, such as Australia and the United States, the local wine

tourism development experience has not yet realised its full potential. Or as Scott (2010) states, South African wine tourism has “considerable promise for further growth and future development of wine tourism remaining as yet, to be fully tapped or exploited in the local context” (Scott 2010: 5). These sentiments expressed six years ago about the state of South Africa’s wine tourism industry are examined more closely in Chapter 4, to assess whether South African wine tourism can hold its own with countries like the USA and Australia. The next section concludes Chapter 2.

2.6 CONCLUSION

The concept and phenomenon of wine tourism have received increasing attention since the mid-17th century with the start of the Grand Tour tradition. Since then the concept of wine tourism has evolved through new interpretations and definitions and it now embodies an entire experience. Wine tourists are lured to places of natural beauty and supplied with ample activities and good quality wines. Without the desire and efforts of wine makers for visitors to taste their exclusive wines, the wine tourism phenomenon might never have existed. Although the wine tourism concept now encapsulates a range of facilities, activities and services, the tasting of good quality wine and engaging with the wine making process is still at the core of it all. Wine routes have become the roadways to enjoying good quality wines and engaging in extraordinary wine tourism experiences offered by the various wine regions around the world. The phenomenon of wine tourism has enabled individual winery nodes to connect through special routes and develop and evolve into authentic wine resorts. Today, there are numerous well-known wine routes around the world which stand in their own right. This chapter has considered the definition of the wine tourism concept and where it fits into the broader tourism and wine industries. The main features of wine tourism, namely the wine tourist, the role of the cellar door, the wine tasting experience and other ancillary activities were looked into. The development of wine routes around the world was discussed. The social contribution of the wine industry at large was explored briefly and the wine tourism situation South Africa was overviewed. The next chapter addresses the methodology and discusses the methods used to collect the appropriate data and information.

CHAPTER 3 METHODOLOGY, METHODS AND MATERIALS

3.1 INTRODUCTION

A mixed-method approach is used to examine the state of wine tourism development in South Africa's wine regions, the life-cycle phase of each wine route in South Africa, the perceptions of visitors to Cape Town and the social contribution made by one wine farm. Questionnaire surveys were used to gather quantitative and qualitative data. This chapter introduces the mixed-methods approach and explains the research instruments used to realise the research objectives.

3.2 MIXED-METHODS RESEARCH

Mixed-methods research is normally used to investigate and better understand the complexity of social phenomena (Schutz, Chambless & DeCuir 2003; Greene 2007; Malina, Nørreklit & Selto 2011). The integration of multiple research methods enhances the creative potential of a study and builds confidence in the findings (Eisenhardt 1989; Newman & Benz 1998; Johnson & Onwuegbuzie 2004; Abowitz & Toole 2009; Östlund et al. 2011; Malina, Nørreklit & Selto 2011). A mixed-methods approach requires skills and knowledge in selected fields (different disciplines) of inquiry, so increasing the time spent and workload involved in the construction of appropriate research and analysis instruments (Punch 2005; Teddlie & Tashakkori 2009; Creswell & Plano Clark 2010; Felizer 2010; Harrits 2011). Documentation of the mixed-methods procedures and results is often time consuming and demanding as researchers must make sense of large volumes of data (Schutz, Chambless & DeCuir 2003; Blaxter 2010). In this research a range of research instruments was used.

3.3 STEPWISE APPROACH

The first steps in the research process were to review appropriate literature on (1) the wine tourism industry globally; (2) wine regions and wine routes around the world; (3) the development of wine tourism products and experiences; and (4) the role wine tourism plays in the development of rural areas. Primary data was collected through two questionnaire surveys. The first survey collected information about wine farms (members of the route) on existing wine routes. The second questionnaire survey collected information from visitors to Cape Town regarding their perceptions and experiences of wine tourism in South Africa. The questions covered in the two questionnaire surveys included open-ended and closed-ended questions, which produced both descriptive and measurable information. Secondary data and information were gleaned from (1) scholarly articles and theses on

wine tourism and the role it plays in regional development, and (2) industry reports. Desktop research was done on a leading wine farm regarding their employee practices. The survey data was captured and analysed to create an assessment framework for determining the wine tourism development of nodes/wineries (clustering of infrastructure, superstructure, tourism products and experiences) and the developmental phase of each wine route in South Africa (Section 3.5). The following section explains the main research instruments used for data collection, capturing, analyses and presentation.

3.4 THE QUESTIONNAIRE SURVEYS

Collecting data by means of a questionnaire survey is a widely used and well-known method, especially where it involves a large number of respondents and where respondents are widely dispersed geographically. It is a suitable strategy for obtaining answers by questioning from a large number of cases representing the population of interest (Blaxter 2010). The content and goal of each of the questionnaire surveys are outlined briefly.

3.4.1 Supply-side perspective: Questionnaire survey of wine farms (winery nodes)

This questionnaire survey was the primary data-collection instrument and commenced in February 2015 until January 2016. To determine the state of wine tourism development in South Africa, the state of wine tourism in terms of infrastructure, superstructure, products and experiences, and activities on wine farm level, had to be established. The questionnaire comprised five sections (Appendix A).

In section one, thirteen questions were asked regarding *general wine farm details*. The questions focused on personal details and general information about the farm and covered type of ownership, number of employees, annual turnover, trading hours and membership of a wine route. In the second section two questions were asked about the *facilities available* on the wine farm/estate. Respondents were asked to select the facilities offered on the wine farm, specifically which facilities were offered and the capacity of certain facilities. Participants were also asked to indicate the most popular experiences on offer on their farm. In the third section further eight questions required participants to disclose information about their *visitors*, that is the typical visitor to the farm, the number of day or overnight stays, the local:international ratio, average spend per visitor, the farm's annual spending on marketing and the ways visitors hear about the wine farm's brand. In the fourth section participants were asked two questions regarding the *additional services* offered on the wine farm, for example wine tasting and sales by appointment, wine auctions, mail order and internet sales, selling wine internationally to companies and private clients, a wine club, loyalty programme, access by disabled

visitors and accessibility by tour busses. The two questions in the fifth section covered the *environmental and social practices employed* on the wine farm. Respondents were asked to indicate what they do (social projects or programmes) for their employees and their family members, and which environment-friendly farming practices applied on the wine farm.

National census

All the wine route members were surveyed for a national census of wine farms to eventually do analyses on three levels, namely the wine farm level (node), the wine route level (network) and the broader wine region level (winescape).

Distribution method

Questionnaires were distributed in 21 of South Africa's wine routes. The questionnaires were sent via email (see Appendix C for the cover letter) to wine-route managers, who were requested to forward them to all the members of their wine route. A link was also created on Survey Monkey, an online survey development cloud-based software, and the wine route members were given the option to complete an online version of the questionnaire for quick and easy return. These two methods produced 120 completed surveys. The initial response rate of 120 (30%) completed questionnaires was too low so that face-to-face interviews, by driving to the wine route members, were conducted to reach a response rate of 70% (319 completed questionnaires). The survey generated quantitative and qualitative data.

3.4.2 Demand-side perspective: Visitor questionnaire survey

The visitor questionnaire survey is of secondary importance but it adds value from a demand-side perspective regarding visitors' perceptions on a good wine tourism product and experience. The questionnaire comprises 13 questions about how South Africa is experienced concerning its wine tourism product portfolio; which wine regions are more popular than others among visitors; and what features attract visitors to these regions. The subjects were tourists visiting Cape Town. The distribution of questionnaires targeted specific areas where it would be most likely to find tourists generally (e.g. Cape Town International Airport) and particularly wine tourists at selected wine farms and estates. The questionnaires were completed with the assistance of 30 fieldworkers who interacted face-to-face with visitors. The fieldworkers were divided into groups of three, each fieldworker completing 15-20 questionnaires until the target of 500 completed surveys was reached. Fieldworkers explained the survey to participating respondents, assuring tourists that answers were anonymous and they could withdraw at any juncture. The questionnaire is attached as Appendix B.

Distribution method

The questionnaires were distributed at seven points in and around Cape Town selected on the basis of where the most diverse groups of visitors interact. The distribution points were at Cape Town International Airport, the Table Mountain Aerial Cableway, Victoria & Alfred Waterfront, a Red Bus pick-up point in Long Street in Cape Town, Franschhoek main road, Spier wine estate and Spice Route.

Building the database

The data collected during the surveys was captured, displayed and analysed by SPSS predictive analytics software that provides statistical analysis and reporting (Introduction to SPSS n.d.). The SPSS program was used for data analysis and to produce graphs and cross-tabulations of the wine farm and wine route. Spatial representations of the wine routes in the form of maps showing the distribution of wine farms on wine routes were produced. The next section explains the framework for assessing wine tourism development at different levels, namely nodal, network and wine region.

3.5 ASSESSMENT FRAMEWORK

Theoretical underpinnings to scale wine tourism development

The assessment framework draws on the work of Miossec (1977) on the spatial development of a destination, Butler's (1980) TALC model, Dodd & Beverland's (2001) winery tourism life cycle stages and Scott's (2004) thesis research. When Miossec's (1977) ideas are applied to wine tourism development, the wine destination development begins with the establishment of a pioneer node (an open cellar door) or a few pioneer nodes; expands to network formation (wine route development where multiple nodes are connected through a road network); and culminates with the establishment of a destination system (more than one wine route with an integrated nodal and network system with signs of hierarchical differentiation between nodes and the routes). The TALC model (Butler 1980; 2006) is clearly related to all economic, community and environmental dynamics of wine tourism. The model postulates that decline or planned rejuvenation are not inevitable, but possible in certain evolutionary stages. Based on Butler's (1980) ideas, Dodd & Beverland (2001) developed a framework more appropriate to wine tourism destinations. It proposes five life cycle stages ranging from winery establishment to recognition, then regional prominence to maturity and finally, tourism decline.

Weights assigned to tourism features of a wine farm or estate

Five questionnaire sections were selected from the wine farm questionnaire to determine the state of development of each wine route. The purpose for creating an assessment framework was to quantify the data for calculating the clustering of infrastructure, superstructure and products and experiences (critical mass) in terms of number of facilities and services. Weighted values established the degree to which each node (winery) had developed as shown by the clustering of wine-related activities and experiences at a node (Table 3.1). Weights were assigned to core wine-tourism-related products, experiences, superstructures and services to a maximum of 100 points per node. Opportunities for wine tasting, wine-production experiences (cellar tours), pairing of food and wine, fine dining, sleepovers on a wine farm, spa treatments (vino therapy) and taking part in outdoor activities (hiking, mountain biking) scored 70 points (70%). Other tourism services and the capacities of superstructures accounted for 30 points (30%) in the framework.

Table 3.1 Weights assigned to tourism features of a wine farm or estate

Wine tourism products and experiences	Points awarded
	Total points: 20
○ Wine tasting	5 (+ 5 if seated)
○ Cellar and vineyard tours	5
○ Wine pairings	5
○ Chocolate and wine	
○ Cheese and wine	
○ Food and wine	
○ Other pairings	
Catering services: Restaurant & eatery	Total points: 12
○ Platters	1
○ Café and coffee shop	1
○ Breakfast & lunch menu	2
○ À la carte restaurant	3
○ Fine dining (food and wine pairing)	5
Outdoor activities	Total points: 8
○ Outdoor activities	
○ Mountain biking	2
○ Hiking	2
○ Horse riding	2
○ Children's playground	2
Tourist superstructure	Total points: 30
○ Conference room	2
○ Private function venue	4
○ Art gallery	3
○ Museum	3
○ Historical building or special architecture	3
	Continued overleaf

Table 3.1 continued	
○ Accommodation	
○ Camping facilities	1
○ Self-catering chalets or cottages	2
○ Manor House	3
○ Bed & Breakfast	3
○ Hotel & spa	6
Services	Total points: 10
○ Cash	0.5
○ Credit card	0.5
○ Debit card	0.5
○ Bus tours and group bookings	0.5
○ Disabled access	0.5
○ Specific sales	0.5
○ Trained sales and tasting staff	0.5
○ Tasting by appointment	0.5
○ Wine auctions	0.5
○ Delivery facilities	0.5
○ Mail order sales	0.5
○ Internet sales	0.5
○ Sell wine internationally to companies	1
○ Sell wine internationally to private clients	1
○ Wine club	1
○ Loyalty programme	1
TOTAL: 80 points	

Table 3.2 shows the weights given to a wine farm or estate for the capacity of its tourist superstructure. For wine tasting, seated tasting room, wine pairings, conference room, accommodation and a restaurant a point out of three can be awarded, for a private function venue a point out of two can be awarded to a wine farm or estate.

Table 3.2 Weights assigned to capacity of facilities

Tourist superstructure		
Facility	Capacity	Points awarded
○ Wine tasting	0-50	0.5
	51-100	1
	101-200	2
	> 200	3
○ Seated tasting room	0-50	0.5
	51-100	1
	101-200	2
	>200	3
○ Wine pairings ○ Chocolate & Cheese pairings	0-50	0.5
	51-100	1
	101-200	2
	>200	3
		Continued overleaf

		Table 3.2 continued
○ Conference room	0-50	0.5
	51-100	1
	101-200	2
	>200	3
○ Private function venue	0-100	0.5
	100-500	1
	500+	2
○ Accommodation (any type)	0-20	0.5
	20-50	1
	50-100	2
	100+	3
○ Restaurant (any type)	0-50	0.5
	50-100	1
	100-200	2
	200+	3
		Total points: 20

The development scores out of 100 were calculated for each node. These scores were summed to give a total for each wine route which was then used to position the route in a life cycle phase. The life cycle phase in which each wine route was identified is discussed in Chapter 4.

Desktop case study

Desktop study refers to the collection of secondary data (published reports, newspapers, articles, online websites etc.) and the process of collecting readily available information in the public domain and then using it for study purposes. The information gathered is also generally freely available to anyone and there are few costs involved for finding it. Although desk research can prove to be valuable, it is limited in its scope because it may not accurately apply for any given situation (Collins English Dictionary 2016).

A desktop study was done for one wine farm regarding its socio-economic contributions to the wine and wine tourism industry and the social and environmental practices employed on the farm. The purpose was to determine what was done on the wine farm to assist its employees and their families. This is significant because much attention is given to the environmental impacts of wine-production practices and less to the social contributions of the wine industry⁸. Information elicited by the wine farm questionnaire survey about the environment-friendly practices employed and the social

⁸ There have been negative press reports in 2016 with regards to the relationship between wine farm workers and the owners of these farms. This study aims to shed light on a best practice example in Chapter 7.

development projects encouraged was used in conjunction with secondary information. The wine farm was chosen on the criterion of it being well-known for its social contribution. The case studied farm provides an example of what wine farms or estates can strive for concerning their social contribution and sets a benchmark.

3.6 CONCLUSION

This chapter has explained the mixed-methods approach used where two questionnaire surveys were administered. The wine farm survey involved all the members of the wine routes to determine the state of development of each node, network and wine region and to identify the life cycle phase of each wine route. The visitor survey gauged the perceptions of visitors to Cape Town regarding wine tourism experiences. An assessment framework was devised and applied to the data collected by the wine farm survey. An in-depth desktop case study examined the socio-economic contribution of a single wine farm to the welfare of its employees and families. Chapters 4, 5 and 6 report results and findings of supply-side analyses of the wine farms and estates (tourism nodes), tourism routes (networks) and wine regions (winescapes). Chapter 7 present results from the demand-side perspective (visitor questionnaire survey) and Chapter 8 document on the social and environmental best practices of South Africa's wine farms and estates.

CHAPTER 4 THE GEOGRAPHY OF WINE TOURISM IN SOUTH AFRICA

AFRICA

4.1 INTRODUCTION

This chapter begins by reporting on the application of the assessment framework at nodal (wine farm) level. It then proceeds to a discussion of the ultimate wine tourism experience as opposed to a basic emerging experience. The bulk of the chapter is devoted to expositions of each wine route's offering of tourism and wine tourism experiences and products. The primary research instrument (wine farm survey) provided the information and data on the geography and supply of wine tourism experiences (for example wine tasting; wine and food pairing; cellar tours; wine stomping) the extent of infrastructure and superstructure for wine tourism; hospitality services (restaurants and tourist accommodation); and ancillary tourism services on each wine farm or estate. Graphs, maps and photographs illustrate the discussions and explanations. The information on the wine farms and estates is provided by 319 participating wine route members. Figure 4.1 shows the distribution of the participating wine farms and estates on the wine routes in South Africa.

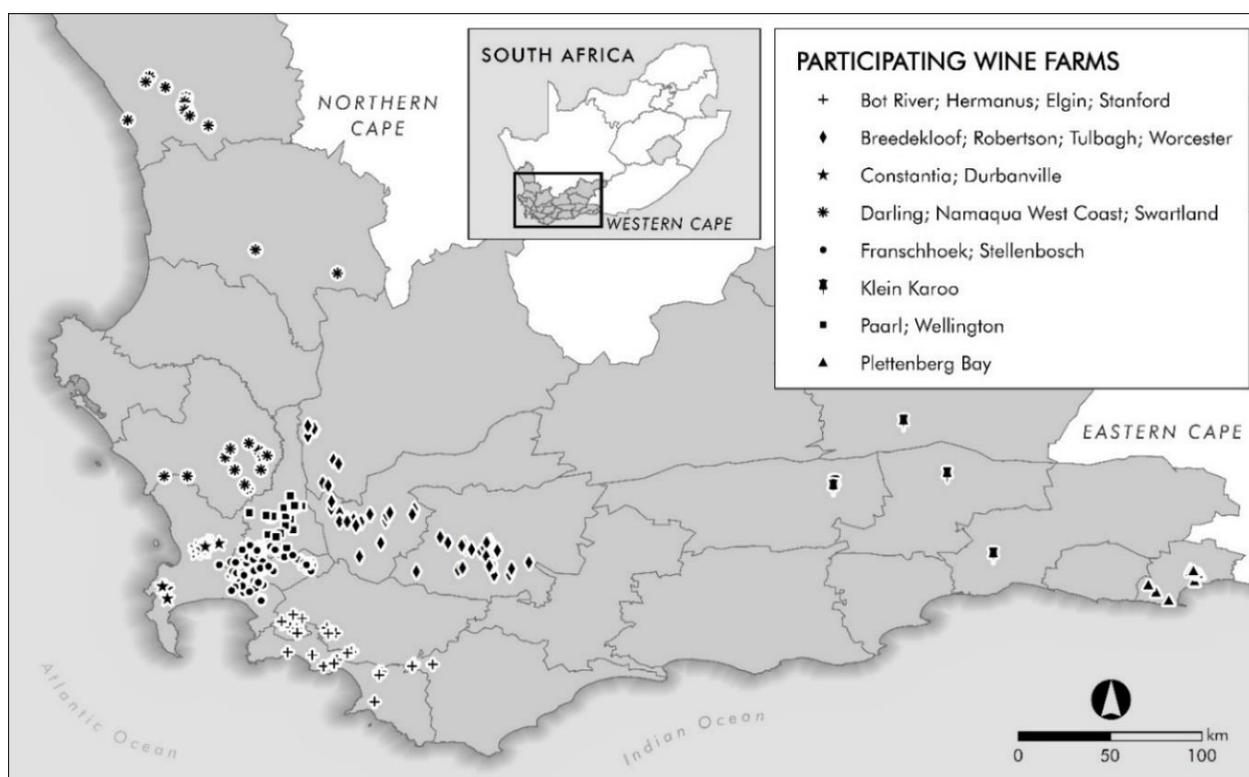


Figure 4.1 Wine farms and estates that participated in the survey of wine tourism

4.2 APPLICATION OF ASSESMENT FRAMEWORK AT NODE LEVEL

Section 4.2 reports on the results of the application of the assessment framework at node level. The section begins with the ultimate wine tourism experience as opposed to the basic emerging experience, at node level and proceeds to reporting on the 20 most developed winery nodes in South Africa. South Africa had 566 wine cellars (private and corporate producers) in 2015. These nodes are the places where wine is produced and presented for tasting (or sampling) in different formats and complemented by hospitality and catering features and services. Fortunately, 451 (80%) of these winery nodes are already members of wine routes.

4.2.1 Ultimate wine tourism experience versus the basic emerging experience

Initially, wine tourism involved the tasting of wine at the wine cellar without any added facilities, services or activities. Thus, visitors to taste the wines of a wine farm or estate on-site is regarded as the first level of the wine tourism experience. This is the basic form of wine tourism and thus the basic emerging experience (Pikkemaat et al. 2009).

Regarding the ultimate wine tourism experience, Pikkemaat et al. (2009) claimed that wine consumers are a very demanding group, moving away from the cellar door experience to one that offers a total experience and package. The phenomenon of ‘escapism’ has been shown to be a significant factor motivating visitors to visit a wine farm or estate. Hall & Johnson (1997) maintain that the tranquillity offered by rural settings is vital to ensuring a positive wine tourism experience. Getz (2000) supports this view that both peaceful surroundings and scenic landscapes are important in creating the concept Page & Getz (1997) and Marzo-Navarro & Pedraja-Iglesias (2009) have been termed ‘country experience’. Ravenscroft & Van Westering (2001) discovered that the educational elements of the winery experience, such as winemaking classes, wine tasting and being able to interact directly with wine makers about the attributes of the available wines are cogent reasons for visitation (Baird 2012).

Wine, food, tourism and the arts collectively comprise the core elements of the wine tourism product, providing the lifestyle package that wine tourists seek to experience (Carlsen & Charters 2006; Roberts & Sparks 2006). Roberts & Sparks (2006) identified eight enrichment factors that comprise the ‘total’ wine tourism experience: (1) authenticity; (2) value for money; (3) service interactions; (4) setting and surroundings; (5) product offerings; (6) information dissemination; (7) learning experiences for

personal growth; and (8) indulgence. More recently Carlsen & Boksberger (2013) identified four core elements comprising the ultimate wine tourism experience. They are first, entertainment (wine events, festivals, wine tourism in vineyards with wine tasting, cultural events themed around wine); second, education (learning about the wine and the wine-production process, guided tours, wine courses); third, escape (guided tours through vineyards, participating in the wine-production process, sport activities combined with wine); and fourth, aesthetic (landscapes dominated by wine, good signage and information on the region, well-tended wine bars, wine shops) (Carlsen & Boksberger 2013). Among these Griffen & Loersch (2006) consider the landscape, signage and cellar door as most important to the wine tourism experience, although wine tourism and wine tasting were also important entertainment experiences. Consequently, the ultimate wine tourism experience typically includes a restaurant, accommodation, wine tasting, an art gallery, education, wine tours, outdoor activities, scenic landscapes, good signage and personal interaction with wine makers regarding the wines and wine-making processes. This ultimate wine tourism experience provides the foundation for comparing individual wine farms or estates with one another in terms of their wine experience. Figure 4.2 shows the typical wine tourism experience including wine tasting and food and wine pairing, an art gallery, an outdoor activity (biking) and fine dining.



Sources: Brunton (2014); Wightman (2016)

Figure 4.2 Example of wine tourism experiences

4.2.2 Level of development on node level

The response in completed questionnaires for 319 wine tourism nodes were examined. Weighted values were used to determine the degree to which each node (winery) has been developed by the clustering of wine-related activities and experiences at a node (Table 3.1 and 3.2). Weights were assigned to core wine-tourism-related products, experiences, superstructures, services and capacities to a maximum of 100 points per node. Opportunities for wine tasting, wine-production experiences (cellar tours), pairing of food and wine, fine dining, sleepovers on a wine farm, spa treatments (vino therapy) and taking part in outdoor activities (hiking, mountain biking) scored a possible 70 points (70%). The capacities of superstructures accounted for a further 30 points (30%) in the framework. The application of the weights determined the degree of development for wine tourism for each node. Table 4.1 lists the top 20 winery nodes, some of which have become resorts in their own right boasting landmark wineries, luxury hotels with spa facilities, more than one restaurant and excellent art collections that draw visitors to these enclaves (see Appendix D for the complete list of 319 wine farms and estates). It is noteworthy that Table 4.1 only reflects the assessment framework created for this research. Should other elements be added or some removed (like the capacity ranges) the scores of the wine farms and estates would quite likely change, for example some renowned wine estates do not cater for large numbers of visitors.

Table 4.1 Development score of the top 20 winery nodes

Rank	Wine farms or estates	Wine route	Development score out of 100
1	Grande Provence	Franschhoek Wine Route	66
2	Allée Bleue	Franschhoek Wine Route	64
3	Groot Constantia	Constantia Wine Route	64
4	Lanzerac Wine Estate	Stellenbosch Wine Routes	63
5	Babylonstoren	Franschhoek Wine Route	62
6	Leipzig	Worcester Wine and Olive Route	59
7	Montpellier	Tulbagh Wine Route	59
8	Rickety Bridge	Franschhoek Wine Route	58
9	Dornier Wines	Stellenbosch Wine Routes	58
10	Opstal Estate	Breedekloof Wine Route	58
			Continued overleaf

			Table 4.1 continued
11	Mooiplaas Wine Estate & Private Nature Reserve	Stellenbosch Wine Routes	57
12	Backsberg Estate Cellars	Franschhoek Wine Route	56
13	Delaire Graff Estate	Stellenbosch Wine Routes	55
14	Steenberg Vineyards	Constantia Wine Route	54
15	D'Aria	Durbanville Wine Route	54
16	Diemersfontein	Paarl Wine Route	53
17	Neethlingshof	Stellenbosch Wine Routes	51
18	Stellenrust	Stellenbosch Wine Routes	51
19	Asara	Stellenbosch Wine Routes	50
20	Bloemendal	Durbanville Wine Route	50

Table 4.1 shows that majority of the top 20 wine farms and estates with development scores between 50 and 66 out of 100 are in the Stellenbosch Wine Routes and Franschhoek Wine Routes and others located in the Constantia, Worcester, Tulbagh, Bredekloof, Durbanville and Paarl wine routes. In the next section, South Africa's wine routes and the unique tourism and wine tourism experiences offered are discussed.

4.2.3 Location, historical and tourism context of South Africa's wine routes

This extended section presents details of 19 (of the 21) South African wine routes regarding their location, history and tourism characteristics, as well as the distinctive geographical factors (e.g. terroir) of each wine route. A short discussion is also included on two wine farms or estate based on the wine route's highest and lowest scoring node. First the wine routes positioned in the Coastal and Olifants River Region are discussed; second the wine routes situated in the Breede Valley Region; third the wine routes in the Cape South Coast Region are discussed; and lastly the wine routes positioned in the Klein Karoo Region. No routes were positioned in the Greater Karoo Region. The Orange River Wine Route and Elim Wine Growers are not discussed, as the response were too low to make meaningful analyses and conclusions. Table 4.2 shows a summary of the total wine route members and their participation before detailed discussion on each wine route.

Table 4.2 Summary of total wine route members and their participation in the study

	Wine route	Total wine route members	Total member participation	% participation
1	Stellenbosch (SWR)	152	90	59
2	Franschhoek Vignerons	52	32	62
3	Robertson	42	37	88
4	Paarl	26	20	77
5	Durbanville	12	11	92
6	Elgin	17	12	71
7	Constantia	8	6	75
8	Namaqua West Coast	15	14	93
9	Wellington	21	13	62
10	Breedekloof	25	15	60
11	Tulbagh	11	7	64
12	Worcester Wine & Olive	12	10	83
13	Santam Swartland Wine & Olive	23	12	52
14	Hermanus	15	8	53
15	Plettenberg Bay	9	5	56
16	Bot River	13	7	54
17	Stanford	8	7	88
18	Klein Karoo	20	10	50
19	Darling	5	4	80

Table 4.2 shows that six wine routes had participation above 50%, four above 60%, three above 70%, four above 80% and two above 90%. The next section focusses on the wine routes positioned in the Coastal and Olifants River Region.

4.2.3.1 Darling Wine Route: Wine, arts and flowers

Location, historical and tourism contexts

The Darling Wine Route is named after the cultural and historic small town Darling. The town was named after Lieutenant Governor Charles Henry Darling (Darling Tourism 2016). From the earliest years travellers through the area were overwhelmed by the beauty of the wild flowers, and since the inception in 1917 of the annual Darling Wildflower show, the incomparable blooming of wild flowers in spring have been main tourist attractions (IDP, Swartland 2007). The Darling region and town is historically associated with dairy milk, butter and cream. Today the town is known best among South

Africans for ‘Evita se Perron’⁹, the popular theatre of Pieter-Dirk Uys the imitable South African satirist (Evita se Perron Darling 2016). Darling is a non-coastal town with a variety of good tourism products to offer visitors in the town and its region. For entertainment there are the Darling Golf Club, an art gallery called Chelsea on 34, the Wilna van der Walt Gallery, and live shows at Evita se Perron. The latter has been a national and international attraction driven by Pieter-Dirk Uys. For the outdoor adventurer there are agritourism attractions at Waylands farm and Dukkit’s orchid nurseries, day hikes at Ronderberg and the opportunity to view game at Buffelsfontein Nature Reserve. For tourists interested in history there are the Hilebrand Monument, the Darling Museum and the !Khoa Ttu San Culture and Education Village. The Darling Wine Route boasts with a one-of-a-kind Voorkamerfest which affords visitors the experience of a “truly South African multicultural sphere” (Voorkamerfest Darling 2016: 1). Voorkamerfest visitors visit different routes set out by the festival taking them on an unforgettable journey between three different homes, from township houses to Cape-Dutch homes. At every stop, there are surprise performances. This initiative extends to inviting visitors into the homes of the Darling people and allowing them to be immersed in the culture of Darling, all promoting the town as a tourist destination (Darling Tourism 2016).

The wine route has five member wineries (Groote Post, Cloof, Ormonde, Withington’s Wines and Darling Cellars) situated in close proximity to the West Coast. Gauged by the number of participating wineries, this route is South Africa’s smallest wine route. The Darling wine route can be reached within an hour’s drive from Cape Town and is therefore well placed to receive day visitors. Darling is situated between the coastal town Yzerfontein and Malmesbury, a service centre of a wheat-production area styled the ‘Bread basket of the Western Cape’. Darling town and region boast a harmonious blend of old and new tourist attractions. The Darling Wine Route is best known for producing wines of unusual character, scenic landscapes and ‘laid-back vibe’ (South African Tourism 2016). Figure 4.3 illustrates the distribution of members of the Darling Wine Route.

⁹ Evita se Perron is inspired by the legends of Argentina’s Evita Perron and our own Evita Bezuidenhout and an ideal place for a theatre. Besides, the word *perron* is Afrikaans for a railway platform (Evita se Perron Darling 2016).

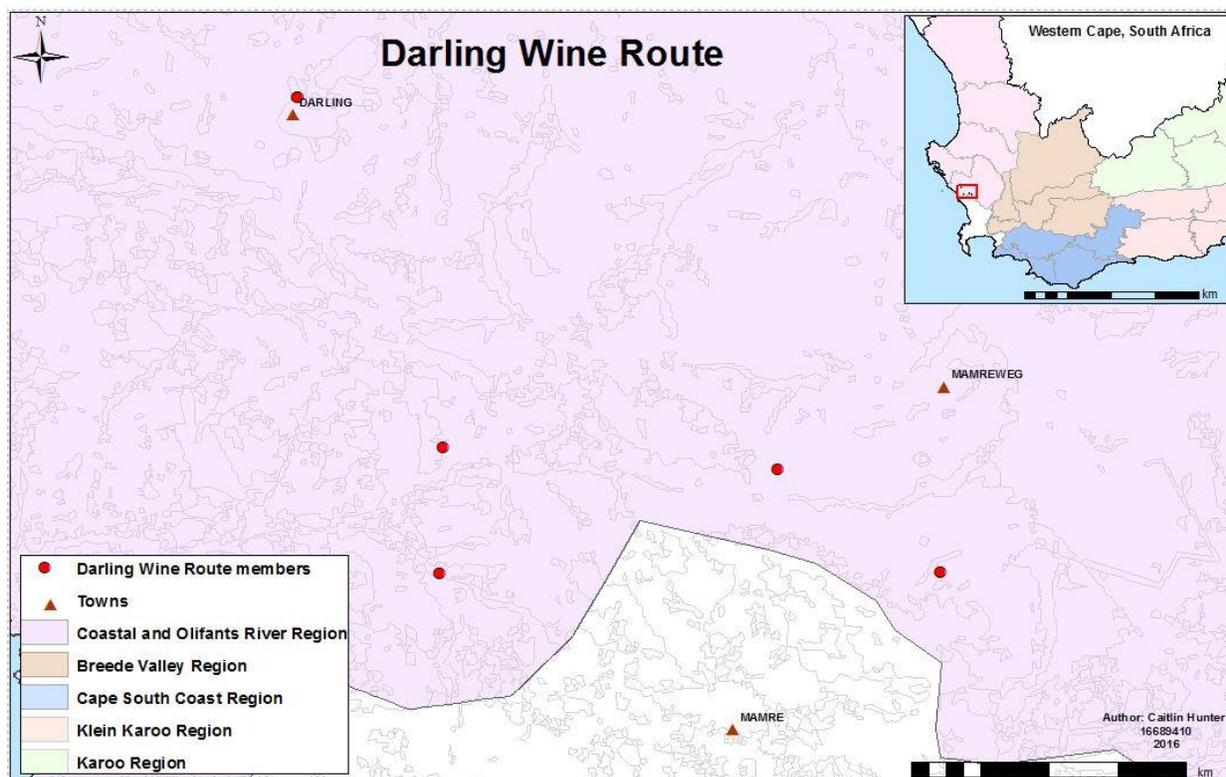


Figure 4.3 Members of the Darling Wine Route in the Coastal and Olifants River Region

Geographical factors for the production of quality wine grapes

The proximity of Darling to the Atlantic Ocean (roughly 5 km) as well as the elevation of the vineyards (30 to 150 metres above sea level), especially in the high-lying Groenekloof ward, has a significant effect on the grapes grown in Darling (Mouton 2006). This has led to some winemakers from other Western Cape wine-growing regions to plant source vineyards in this coastal wine region (South African Tourism 2016). The Darling region is well suitable for the production of cool-climate wines. With hot summer mornings, phenolic (seasonal) ripeness is ensured and early-morning ocean fog provides moisture to the vineyards, while the late afternoon sea breezes cool the vineyards (Aspect 2015). Despite the largely dry land terrain and sparse rainfall in the region in winter and spring, winemakers have prospered in encouraging moisture retention in Darling's lime-rich, red-clay soils. This West Coast wine route is renowned for its Sauvignon blanc, Shiraz and Pinotage (South African Tourism 2016). Lying some 10 km from the cold Atlantic Ocean is the Darling range of hills running parallel to the coast and consisting of erosion-exposed granite intrusions. Although regionally part of the Swartland, this range of hills is vastly different in terms of climate, favouring the cultivation of more delicate varieties. The region has a mean February temperature of 22.7°C and an average annual rainfall of 586 mm. The Groenekloof ward benefits by being protected by its predominantly eastern

aspects from the often harsh winds from the ocean. This ward is characterised by deep reddish-brown soils formed from preweathered granite with a good water-holding capacity, making viticulture without irrigation possible. The merits of grapes from this ward are confirmed by the demand for them by various cellars and winemakers in this and other regions (Aspect 2015). Figure 4.4 illustrates landscape features of Darling.



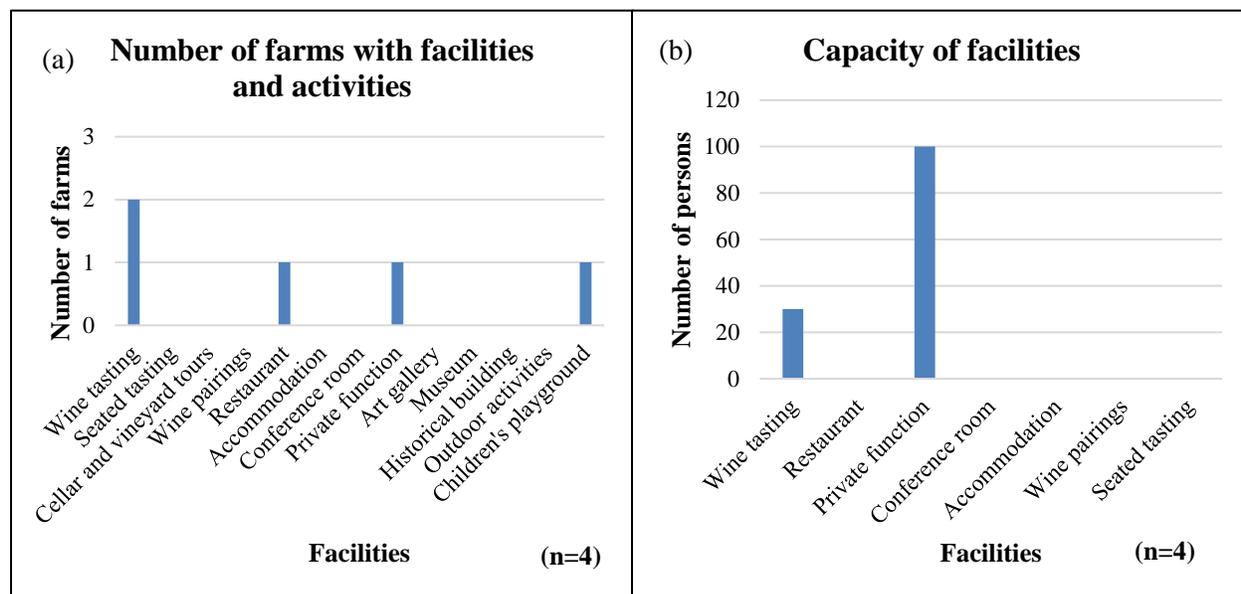
Source: Cloof Wine Estate 2016

Figure 4.4 Landscapes on the Darling Wine Route

Figure 4.4 shows the flower field and winescape of the Darling Wine Route. The Darling Wine Route journey begins at Cloof Cellars; ‘on the road less travelled’ (Cloof Wine Estate 2016), the wines of which include the award-winning Crucible Shiraz (single vineyard), Very Sexy Shiraz, Cloof Pinotage and some unusual red blends. These wines can be enjoyed with an expert host in a rustic-styled tasting room or outside on the lawn along with the smell of homemade, country-style, fresh food (Cloof Wine Estate 2016). The nearby Darling Cellars produce wines in the premium Onyx range, easy-drinking Flamingo Bay wines and Zantsi low-alcohol, natural sweet wines. The Ormonde Cellars is located in the Darling town. The cellar offers three wine ranges, the easy-drinking Alexanderfontein, Ondine and their flagship range, Ormonde.

Groote Post’s wines are more expensive than some of the other Darling wines. This farm produces the only Cap Classique and noble late harvest wines in the ward. Table Mountain is visible from the uppermost vineyards. Groote Post has a 2000 ha game camp where some of Africa’s indigenous antelope can be viewed. Groote Post also offers a restaurant (Hilda’s Kitchen), wine tasting, a wedding venue and the Groote Post Country Market, on the last Sunday of a month. Groote Post has won several local awards, particularly for their Sauvignon blanc, Chenin blanc, Old Man’s Blend and Shiraz wines.

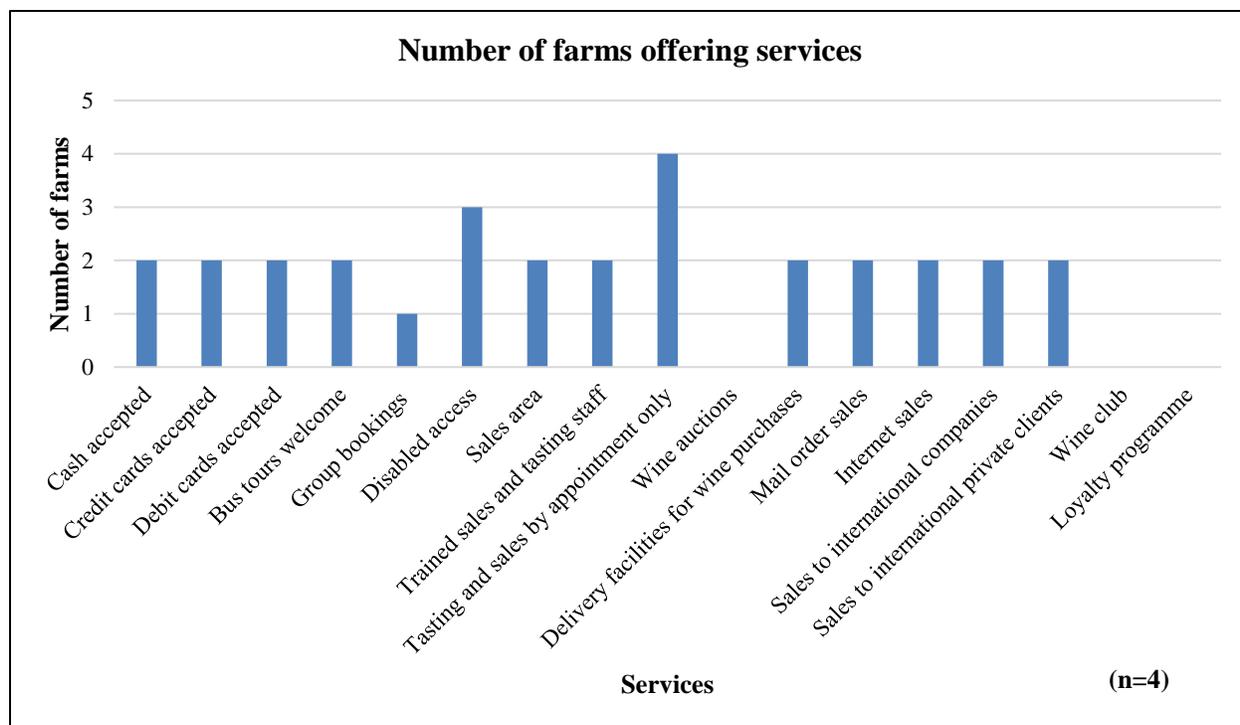
The Darling wine route ‘experience’ is limited in that it mainly allows visitors to taste wines and enjoy food on two of the wine farms offering light lunches and cooked meals. All the participating wine farms offer wine tasting, one restaurant, a private function venue and a children’s playground (Figure 4.5a). Figure 4.5b illustrates the capacity of the facilities on this route. The wine tasting facilities can accommodate about 30 people and the private function venue 100 people. Two of the participants indicated that they offer light lunches and cooked meals at their restaurant, but did not indicate capacity.



Source: Wine farm questionnaire survey

Figure 4.5 Darling Wine Route: Number of farms with facilities and capacity of facilities

Figure 4.6 shows all the services available on the route. All 17 services listed in the questionnaire are offered by between one and four of the participant wine farms. Services include cash (2), credit cards (2) and debit cards (2) accepted, welcome bus tours (2), accept group bookings (1), sales areas (2), trained sales and tasting staff (2), tasting and sales by appointment only (4), delivery facilities for wine purchases (2), disabled access (3), mail order (2) and internet services (2) and selling their wines to international companies (2) and private clients (2).



Source: Wine farm questionnaire survey

Figure 4.6 Darling Wine Route: Number of wine route members offering services

The development scores attained by the participating route members are below 15. The Groote Post Vineyards received a development score of 15, followed by Cloof Wine Estate (11), Earthbound (7) and Ormonde Cellars (3). The number of tourists visiting the Darling Wine Route annually is small (2000 day visitors) compared to other routes. There were no overnight visitors to the wine farms. The low visitation numbers can be the result of Darling's proximity to the Swartland Wine Route which starts at Malmesbury and stretches adjacently to Piketberg. This could be used as an opportunity and to the Darling route's advantage by attracting wine tourism visitors to the route, as well as holiday visitors from the coastal towns, like Yzerfontein. The wine experience on the Darling route involves more than wine to include olive tasting, viewing of wild flowers in spring and game drives. Route visitors can enjoy country-style dining, view the landscapes, engage with a prosperous, creative community and take part in various tourist activities and attractions. The Namaqua West Coast Wine Route is discussed next.

4.2.3.2 Namaqua West Coast Wine Route: The ocean route

Location, historical and tourism contexts

Close to the cold Atlantic Ocean on the Cape's West Coast is one of South Africa's most diverse coastal wine regions. Three of the largest wine cellars (Namaqua Wines, Klawer Wine Cellars and Lutzvile Vineyards) in South Africa are situated on the Namaqua West Coast Wine Route, as well as the country's largest organic wine cellar (Stellar Organics) (West Coast Wines 2016). Many smaller boutique wine producers are dispersed across the Namaqua West Coast region. The mountain peaks like Gifberg, Maskam and Koebee are an essential part of the Namaqua West Coast Wine Route and surrounds the Olifants River Valley. The first documented sale of wine in the Namaqua West Coast region was penned by the French explorer Francois le Vaillant in the late 18th century (South African Tourism 2016). He had been travelling along the Olifants River and wrote that he bought 'strong liquor' from the Widow van Zeijl. At the time, most farmers produced their own wine and brandy and sold some of the surplus to passing travellers. The West Coast Wine Route has numerous charming fisherman's villages offering many outdoor activities including 4x4 routes, quad biking, river rafting, hiking, mountain biking and camping. Every year, after the first winter rains, the landscape is transformed into a carpet of veld flowers (Namaqua West Coast Tourism 2016). The rugged West Coast has pristine white beaches, it is a bird watcher's paradise and, from July each year, whales are regularly spotted in the many small bays. The Rittelfees, one of South Africa's largest music festivals, takes place at the end of October in Vredendal (West Coast Wines 2016).

Namaqua Wines was started in 1947 and are one of the largest wineries in South Africa. In 1992 the winery started exporting wines around the world. Wines include white, red, rosé and sparkling wine from brands namely, Namaqua, Rain Dance, Gôiya, Spencer Bay, Guineverve and B4 Play. These wines can be tasted and enjoyed at Namaqua's tourist centre at the Spruitdrift Winery outside Vredendal along with wine pairings at the restaurant (Namaqua Wines 2016). Cape Rock Wines is situated between Vredendal and Klawer and are about 300 km from Cape Town. A variety of white and red grapes are grown including Cabernet Sauvignon, Grenache, Surah, Grenache Blanc, Mourvèdre, Carignan, Marsanne, Vionier and Colombard. The vineyards of Cape Rock wines cover only eleven hectares and production is focused on simplicity with the least amount of sulphur used during the winemaking process. There are no tasting facilities however visitors are able to order the wines online (Cape Rock Wines 2016). Figure 4.7 shows the seascape of the Namaqua West Coast Wine Route.



Source: Show me (2016)

Figure 4.7 Seascapes in the Namaqua West Coast Wine Route

Figure 4.7 shows the fishermen boats on the seashore, white West Coast cottage and the scenic wild flowers along the Namaqua West Coast Wine Route.

Geographical factors for the production of quality wine grapes

The Coastal and Olifants River Region forms a belt along the broad valley of the Olifants River and incorporates the stand-alone Lamberts Bay ward and the high-altitude wards of Piekenierskloof and Cederberg, a stand-alone appellation bordering this region. The southern part of the valley around Clanwilliam has an annual average rainfall of 370 mm (Aspect 2015). Irrigation water is obtained from the Clanwilliam dam and the soils are mainly sandy alluvial soils from the surrounding Table Mountain sandstone mountains. The climate of the high-lying inland ward of Piekenierskloof is conducive to organic cultivation. Isolated high-altitude vineyards are also found in the Cederberg ward (Platter 2016). Average temperatures are lower than in the valley and average rainfall is higher. The valley stretches from predominantly citrus-producing Citrusdal in the south to Koekenaap in the north (Aspect 2015). North of Vredendal the river turns south-west and flows into the cold Atlantic Ocean. Intensive viticulture takes place in this part of the region which incorporates the wards of Vredendal and Spruitdrift, as well as the cooler, sea-influenced wards of Koekenaap and Bamboes Bay. Here the average yearly rainfall is 220 mm. Medium-textured, very fertile alluvial soils are found on the lower river terraces, while reddish-brown, medium-textured calcareous Karoo soils, similar to those of the Klein Karoo, are found on the higher reaches. Red windblown sand with underlying calcareous silcrete layers is found in isolated areas on higher landscapes. The alluvial and reddish-brown Karoo soils are very rich in cations and phosphate, and often contain free lime. Closer to the cold Atlantic Ocean near Koekenaap are vineyards where cooler climates ensure high-quality, slow-ripening grapes (Aspect 2015). The most widely planted white-wine variety in the Olifants River region is Chenin Blanc and

the main red-wine varieties are Shiraz, Pinotage and Cabernet Sauvignon. With careful canopy management which ensures grapes are shaded by the vines' leaves, combined with modern winemaking techniques, the Olifants River is a source of quality and affordable wines (South African Tourism 2016). Figure 4.8 shows the distribution of member wineries of the Namaqua West Coast Wine Route.

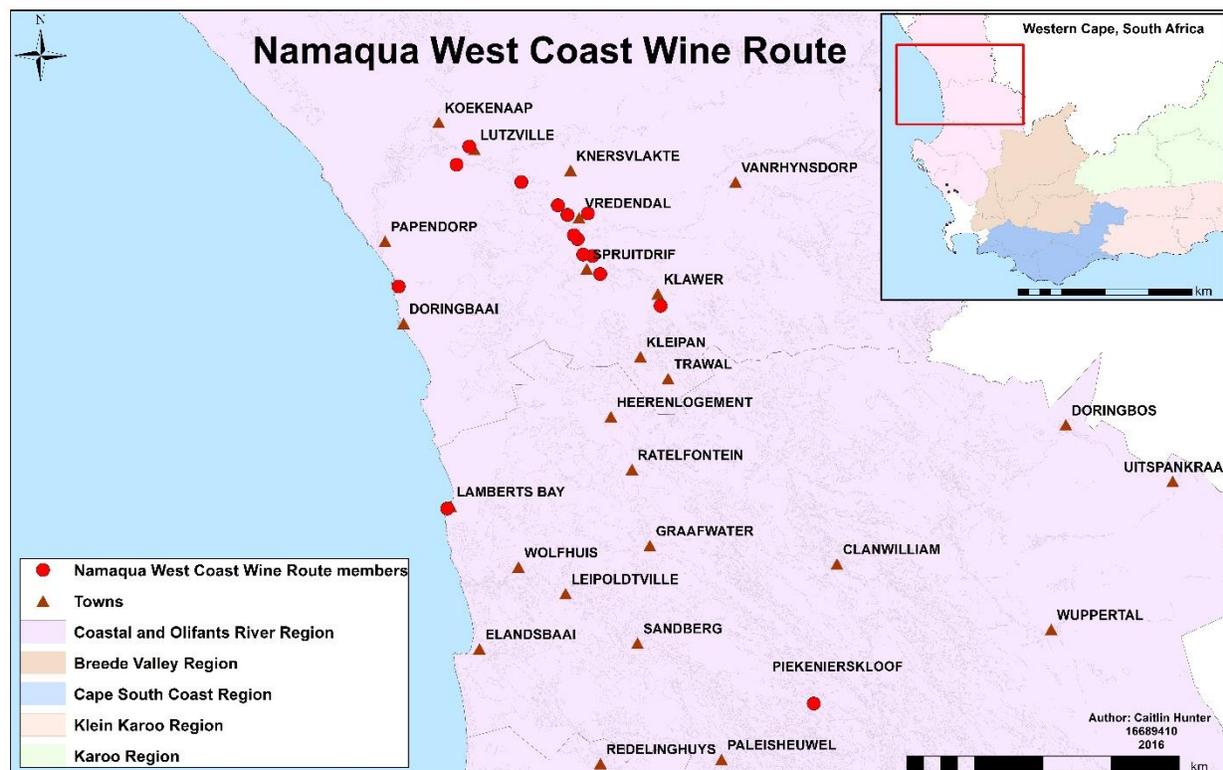
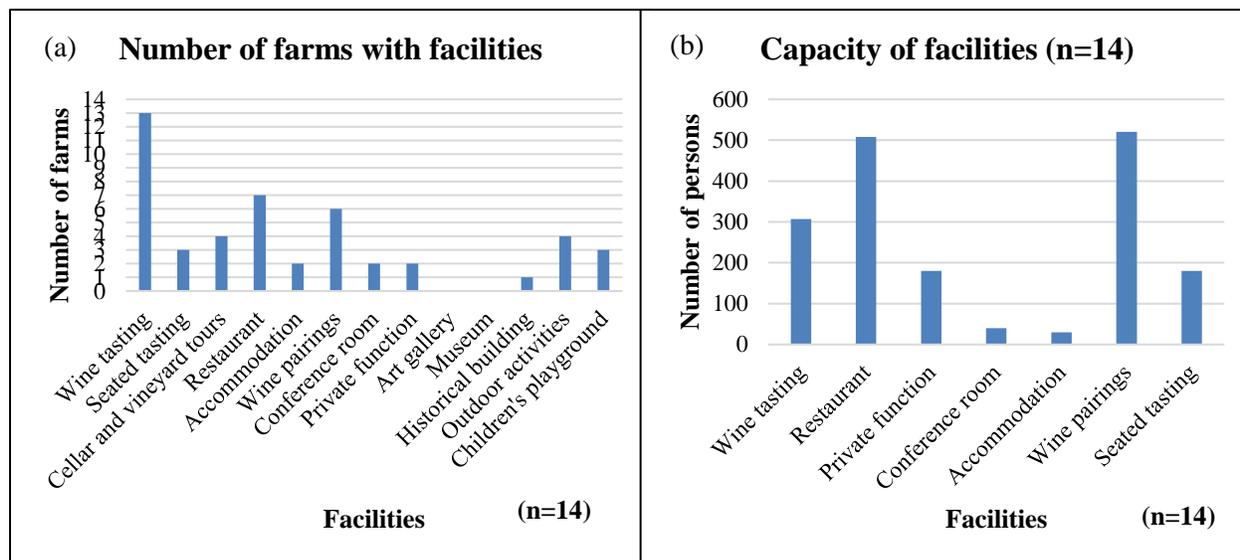


Figure 4.8 Distribution of member wineries in the Namaqua West Coast Wine Route in the Coastal and Olifants River Region

The route has 15 members of which all but one (93%) are represented in the research. Fifty-three per cent of the wine farms are privately owned, while 47% are company owned, with one being a closed cooperation. Sixty-seven per cent of the wineries are open to the public, operating during the week, weekends and on public holidays. Thirty-three per cent are open by appointment only. Almost all (93%) of the members offer wine tasting, 50% of them have restaurants and wine pairings and about one third offer cellar and vineyard tours, outdoor activities and children's playgrounds (Figure 4.9a). However, the route is sadly lacking in terms of accommodation (14%), conference rooms (14%), private function venues (14%), art galleries and museums. The facilities can accommodate more than 500 visitors in the restaurants (with a capacity range between 50 people and 120 people on one winery

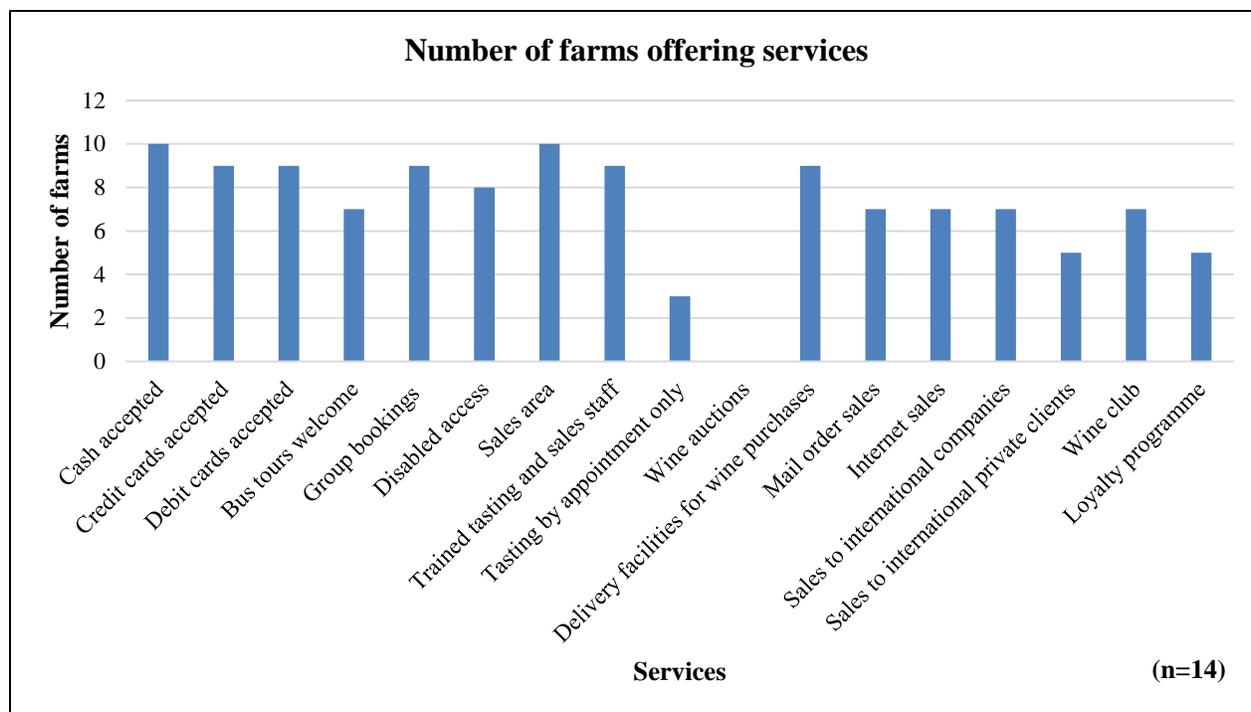
node), about 300 visitors for wine tasting (with a capacity range between two and 70), almost 200 people for private functions (with a range between 60 and 120) and fewer than 100 people in the accommodation facilities (the minimum of four people can be accommodated by one winery and the maximum of 26 people can be accommodated by another) (Figure 4.9b).



Source: Wine farm questionnaire survey

Figure 4.9 Namaqua West Coast Wine Route: Number of farms with facilities and capacity of facilities

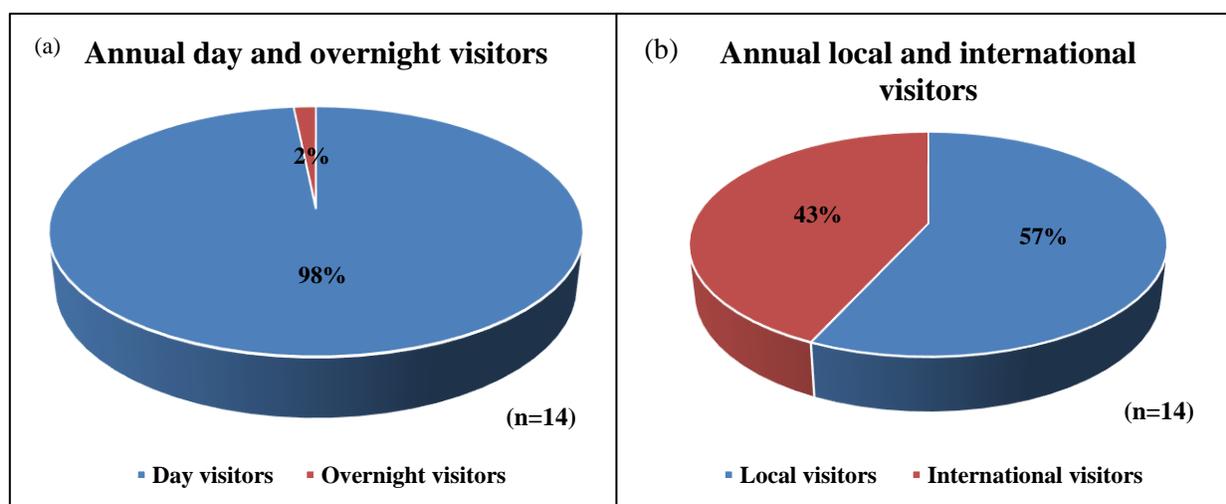
Figure 4.10 illustrates the number of farms providing various services on the route. Again, none of the members offers wine auctions, has a wine club nor a loyalty programme. However, all the other services are provided by between 21% and 100% of the farms.



Source: Wine farm questionnaire survey

Figure 4.10 Namaqua West Coast Wine Route: Number of wine route members offering services

The majority (57%) of the visitors to the wine route are local (Figure 4.11b) and 98% visit the wineries for the day only (Figure 4.11a). The local visitors hail from Cape Town, Johannesburg and Pretoria and spend up to R2000 each per day. The international visitors are mainly from Europe and the United Kingdom and spend up to R5000 each per day.



Source: Wine farm questionnaire survey

Figure 4.11 Namaqua West Coast Wine Route: Visitor origins and stays

Visitors to the Namaqua West Coast Wine Route should not expect to experience stereotypical versions of South Africa's winelands with historic manor houses, modern cellars and restaurants. Instead, visitors will be charmed by whitewashed fisherman's cottages, seasonal wild flowers, seafood straight from the sea, and wines with complexity and conscience. The development efforts in the route should concentrate on foregrounding the historic nature of the fisherman's cottages and seascapes, and provide more accommodation to attract overnight visitors. The development scores received by the participating wine route members ranged between one (Cape Rock Wines) and 44 (Namaqua Wines). Six of the members received scores between seven and 12. The route consists of a number of large wineries and cellars, not focused on a lot of tourist facilities. The next section moves the spotlight to a metropolitan wine route.

4.2.3.3 Santam Swartland Wine and Olive Route: Land of the warm South African sun

Location, historical and tourism contexts

The Santam Swartland Wine and Olive Route is the official name of the route established in 1986. The route is in one of the Western Cape's largest wine-producing areas. The Swartland ('black land' in Afrikaans) is mooted to be named after the hardy indigenous vegetation (rhenosterbos) that dominates the landscape and appears almost black at certain times of the year. The Swartland lies 50 km north of Cape Town, bounded by Darling in the west, Piketberg in the foothills of the Piket Mountains in the north and to the east by the trendy villages of Riebeek-West and Riebeek-Kasteel (Swartland Destinations and Attractions 2016; Swartland 2016). The wide central plain is a vast wheat-farming area, sometimes called the bread basket of the Western Cape. Malmesbury is the Swartland's largest town, established over 265 years ago, and the area is known for its wine farms, wheat fields, sheep farms and poultry farms. The Malmesbury Museum and the nearby Swartland Wine Cellars are popular attractions. Piketberg is a rural town surrounded by spectacular beauty where visitors can immerse in peace and tranquility (Swartland Destinations and Attractions 2016). Piketberg is a destination for enjoying the outdoors and travellers interested in the area's history and culture can visit the various mission stations, art galleries and the farmers' market (Swartland 2016). The entire Swartland comprises magnificent natural areas where visitors can spend time in the warm South African sun. There are a number of reserves, Renosterveld Reserve, Tienie Versveld Reserve, and Swartberg Nature Reserve to visit. The Riebeek Valley offers hiking, cycling, walking, rock climbing and camping venues (Swartland Wine & Olives 2016). Avid cyclists can negotiate the spectacular day trail on Koringberg (near Koringberg) that is 17 km long, tough and challenging. Many

other activities can be enjoyed while meandering through the Swartland towns, including visits to the Piketberg Cultural History Museum, Short Street Market, the Village Market and the Pieter Cruythoff Route Trail at Riebeek-West, Riebeek-West Kasteel, Bar Bar Black Sheep Restaurant and many more restaurants, cafés and arts and crafts shops (Swartland Destinations and Attractions 2016). Annual wine festivals include Riebeek Cellars Annual Grape Stomping (February) and Riebeek Valley Olive Festival (May) (Swartland Wines 2016).

Fifty-two percent of the wine farms on this route are by appointment only, for visitors to have personal experiences and interaction with farm owners, wineries and their families. Allesverloren vineyards are located up the Kasteelberg in the Riebeek Valley, ranging from 170 m to 350 m above sea level. Visitors are welcome to do wine tasting, enjoy homemade deli food or getting a table at their restaurant, Pleasant Pheasant. The ancient oak trees and vineyards allows for beautiful backgrounds for weddings, functions and conferences. Allesverloren's wine varieties include Cabernet Sauvignon, Shiraz, Tinta Barocca (Portuguese), Touriga Nacional (Portuguese), Tres Vermelhos (Portuguese), Tinta Rosé, Red Muscadel, Fine Old Vintage and the 1704 Red 2014 (Allesverloren 2016). The Hughes Family Wines is focused on producing organic blends such as the Nativo Red and Navivo White. These two blends are naturally produced in compliance with the Swartland Independent Producer (SIP) movement guidelines. In 2013 the farm received Organic Certification (SGS). No chemical fertilisers, pesticides and irrigation is used for the farm's vineyards as it relies completely on winter rain (Nativo 2016). Figure 4.12 shows the rolling vineyards of the Santam Swartland Wine and Olive Route along with the tasting area of the Org de Rac wine farm.



Source: Org de Rac Wines (2016)

Figure 4.12 Swartland landscape and building on Org de Rac wine farm

Geographical factors for the production of quality wine grapes

Swartland was traditionally a winter grain-producing area but in summer the landscape is marked by green pockets of vineyards. These vineyards clamber up the foothills of the mountains (Piketberg, Riebeeckberg and Perdeberg) and spread along the banks of the Berg River where the soil is deep and water retention is such that dryland cultivation can be practised (Platter 2016). Low-yielding bush vines, many of them 30 years and older, are found mainly in the Malmesbury area (Aspect 2015). The average annual rainfall in this largest wine district in the Western Cape is 300-500 mm, with 35 to 40% falling during the growing season. The mean February temperature is 23.3°C. The soils are mainly developed from Malmesbury group shales, a sediment older than the Table Mountain sandstone of the coastal region and the Bokkeveld shale of the Little Karoo, but soils derived from Cape granite intrusions also occur. The most sought-after soils are the deep, well-drained reddish-brown soils developed from preweathered granite intrusions north of Malmesbury and along the Darling range of hills (Aspect 2015).

The district of Swartland borders Piketberg to the north, which is not dissimilar in geography and climate. Malmesbury shale is predominant here. Increasing percentages of red-wine varieties, including Cabernet Sauvignon, Pinotage and Shiraz, are being grown here, as well as Chardonnay, Chenin Blanc and Sauvignon Blanc. The Swartland was traditionally a source of robust, full-bodied red wines and high-quality fortified wines. The district has recently also become associated with award-winning Chenin blanc and Mediterranean-style red and white blends (Platter 2016).

The Santam Swartland Wine & Olive Route has 23 members of which fifty-two per cent (12) participated in the study. Seventy per cent of the participating wine route members are privately-owned wine farms and the others are either family owned and company owned. The majority (52%) of the wine farms on the route can be visited by appointment only, while the others are open during the week and on weekends. The Swartland route provides visitors with a combination of wine and olive-related products. Forty-seven per cent of the wine route members sell olive products. Figure 4.13 shows the distribution of the members of the Santam Swartland Wine & Olive Route.

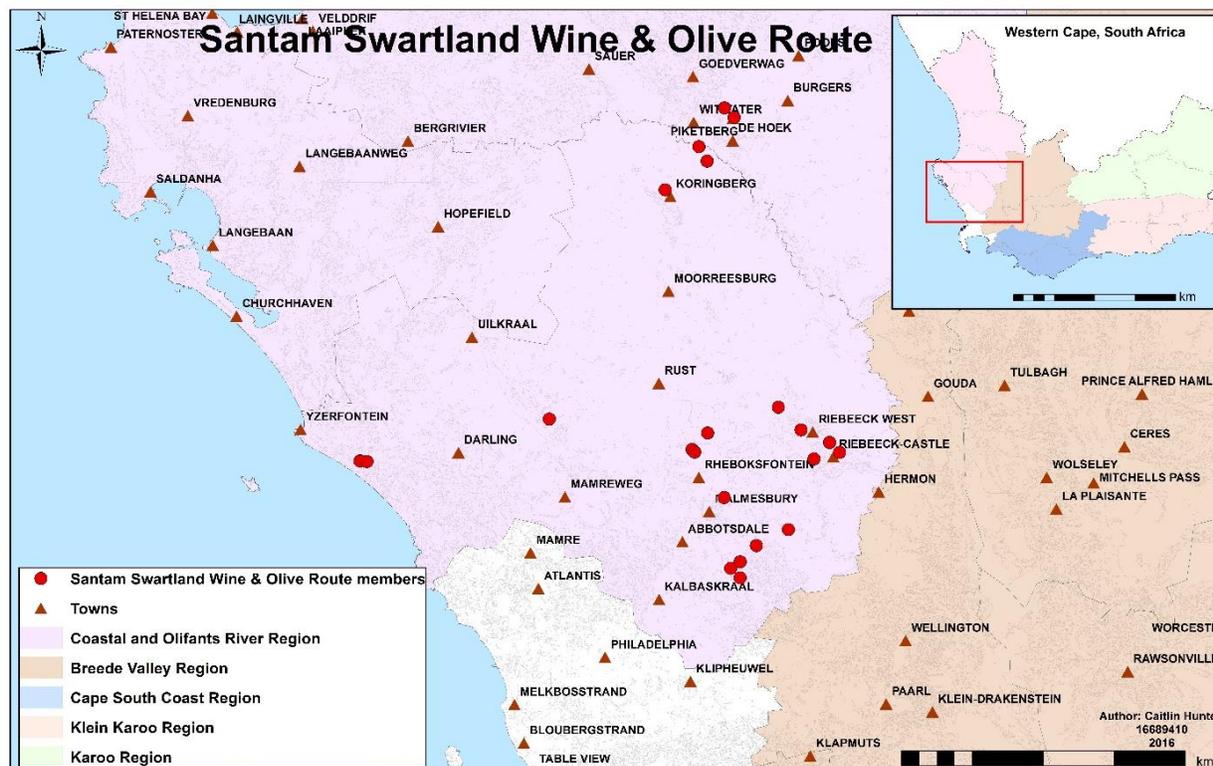
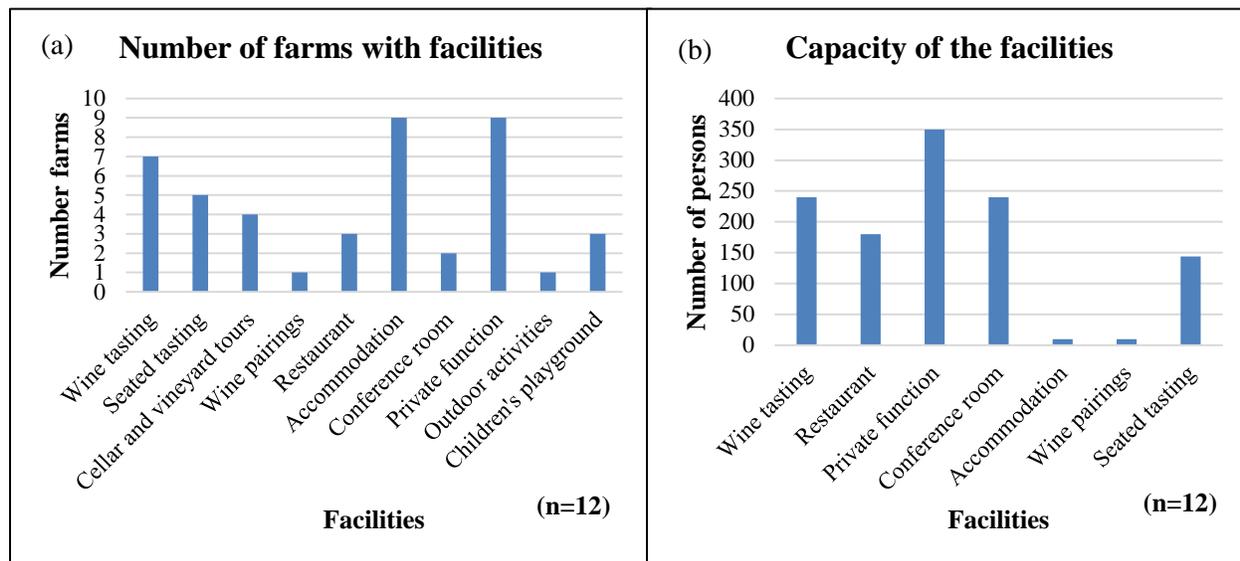


Figure 4.13 Distribution of member wineries of the Santam Swartland Wine & Olive Route in the Coastal and Olifants River Region

The Santam Swartland Wine & Olive Route experience is intimate and personal since the majority of the route members are only open by appointment. Visitors can interact with the winemaker or owner of the wine farm. Visitors can choose the specific wine farm they wish to visit by making an appointment and not just go to popular wine farms open to the public. Figure 4.14a shows the number of facilities on the Santam Swartland Wine & Olive Route. Three out of four members offer accommodation facilities and private function venues, and 58% offer wine tastings and 42% seated tastings. The route is lacking regarding restaurants (3 farms), conference rooms (2 farms) and outdoor activities and wine pairings (1 farm each). More attention should be directed toward developing the outdoor activities for which the dirt roads of the Swartland area provide opportunities. Regarding capacities (Figure 4.14b), wine-tasting rooms can accommodate up to 240 people (the smallest capacity is 20 people and the maximum is 60 people), 350 people in private function venues (with a minimum of 40 and a maximum of 130 people) and 180 in restaurants (with a capacity range between ten and

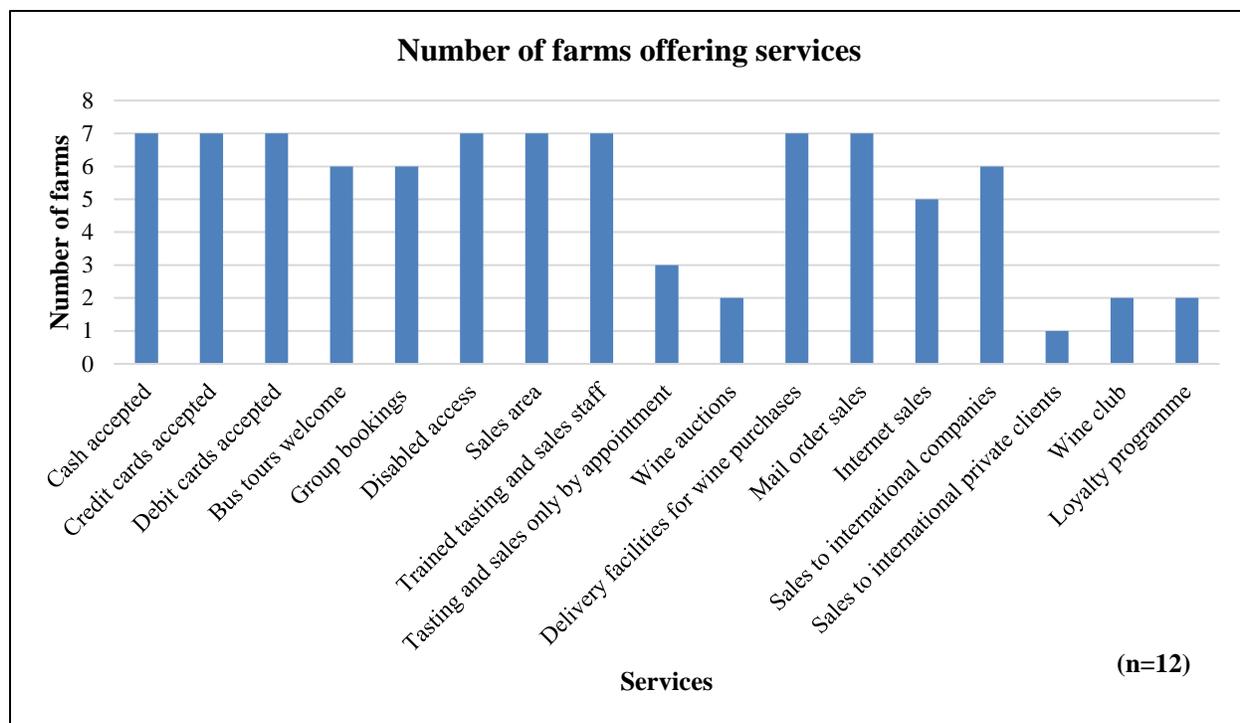
130 people). Unfortunately, the participating members did not disclose the capacity of the available accommodation. Only farm wine farm indicated that they can only accommodate ten people.



Source: Wine farm questionnaire survey

Figure 4.14 Santam Swartland Wine & Olive Route: Number of farms with facilities and capacity of facilities

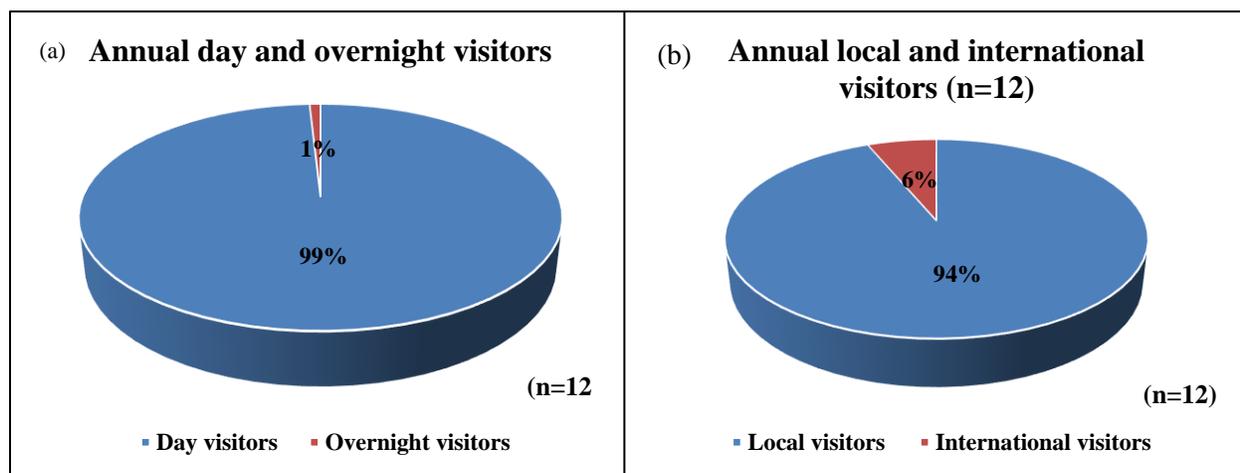
The services available on the route are shown in Figure 4.15. The participating members offer all the services, but to ranging degrees. It is striking that most (eight) services are offered by 58% of the farms; three by 50%; one by 25%; three by 17% and one by 8%.



Source: Wine farm questionnaire survey

Figure 4.15 Santam Swartland Wine & Olive Route: Number of wine route farms offering services

The Santam Swartland Wine & Olive Route relies heavily on local and day visitors (Figure 4.16a and b). Some 75% of the visitors are in the 35-44 age cohort. The local visitors originate mainly from the Malmesbury area, Cape Town and Gauteng and they spend R100 to R500. Most international visitors come from Germany, the United Kingdom and Sweden and they spend on average R100 to R300 per day per visitor.



Source: Wine farm questionnaire survey

Figure 4.16 Santam Swartland Wine & Olive Route: Visitor origins and stays

The Swartland Wine Route development scores ranges from 1 to 37. With five farms getting a development score above 20. Allesverloren has the highest development score (37) and the Hughes Family Wines has the lowest score (1). Because the Santam Swartland Wine & Olive Route stretches over a large area from Paardeberg in the south to Berg River in the north, it is improbable that tourists visit all the route members in one day. Thus, more overnight accommodation is called for even though 75% the route members already provide accommodation. More accommodation will hopefully attract more international visitors. The next section includes the wine routes of the Breede Valley Region. The Breedekloof Wine Route is explored first.

4.2.3.4 Breedekloof Wine Route: Much more than a wine route

Location, historical and tourism contexts

The Breedekloof Wine Route is located 90 km from Cape Town in the Breede River Valley, Slanghoek, Rawsonville and Goudini areas (Breedekloof Wine & Tourism 2016). The Breedekloof Wine Route has existed since 2002. The Breedekloof district received Wine of Origin status in 2006 (Breedekloof Wine Route 2016). Rawsonville dates back to 1823 when the first land patent in the Van Buren Township was given to Henry Snow for the site soon known as Snow's Landing. By 1923 it was called Rawsonville boasting sawmills, grist mills, two cooper shops, a stove factory, several dry goods and general stores, a wagon maker and three saloons (Breedekloof Wine & Tourism 2016).

True to its slogan, 'Much more than a wine route', the mountainous area (Slanghoek, Du Toitskloof and Hex River mountains) is renowned for adventure sports, including hiking, abseiling, zip lining, mountain biking, horse riding, canoeing, river-rafting, fly fishing and various 4x4 trails. The inaugural Breedekloof Outdoor Festival attracted about 10 000 visitors in October 2015. Visitors can visit the Cape Dutch farmhouse at Bushmans Valley (1790), the elegant Victorian homestead of Monte Rosa (1904) and a traditional villa at Sutherland House (1890). Besides wine, Breedekloof is also known for its moskonfyt. Oom Jan le Roux of Pokkraal, a farm named after the deadly pox epidemic of the early 1700s, is renowned for making large quantities of the preserve from fermented ripe grapes. Dinner at Kelkiewijn, an authentic country restaurant in Rawsonville is another drawcard (Breedekloof Wineries 2016). Other attractions are breakfast or lunch and coffee at The Blue Cow Coffee Shop, farm stalls (Die Container, Rietdakkie Farm Stall), the Fairhills Craft Cooperative, outdoor picnics at various venues and the Slanghoek Mountain Resort (Breedekloof Wine & Tourism 2016).

The Opstal Estate is situated at the bottom of the Slanghoek mountains, positioned in the Slanghoek Valley. About 100 hectares of vineyards are planted optimising the various slopes and diverse soils of the estate. Opstal has three ranges, namely the Opstal Range, Sixpence Range and the Heritage Range. Visitors to the estate can enjoy a variety of activities and facilities including wine tasting, eating at the beautiful modern restaurant, weddings, functions and conferences. The estate also has self-catering cottages located nearby. In 2015 the estate received a five star Platter award for their Carl Everson Chenin blanc and The Barber Sémillon (Opstal 2016). Waboomsrivier Wine Cellar is situated between Worcester and Ceres, with a beautiful view of the Bainskloof Pass. Their philosophy rests on being fresh and fruity. The cellar was established in 1949 and was predominantly used for bulk production of red wines. The cellar consists of two smaller cellars (for red and white wine) and visitors are welcomed for wine tasting daily. The wines include Chenin blanc, Sauvignon Blanc, Cape Vintage, Arborea blanc, Arborea, Hanepoot and Pinotage. Visitors can do wine tasting at the cellar daily (Wabooms 2016).



Source: Cape Wine Country (2016)

Figure 4.17 Landscapes in the Breedekloof Wine Route

Figure 4.17 shows the landscapes of the Breedekloof Wine Route and the beautiful Slanghoek mountain.

Geographical factors for the production of quality wine grapes

The Breedekloof Wine Route is home to the first conservancy in the Western Cape winelands. Collaborating with conservation organisations such as World Wide Fund for Nature (WWF), CapeNature and LandCare, it is part of the Cape Floral Region (CFR) with some 160 endemic plant

species in the valley and wildlife, including the Cape leopard and endangered geometric tortoise, in the mountains (Aspect 2015). The Slanghoek and Du Toitskloof mountains, rivers and valleys create a natural environment, attractive to hikers, birders, mountain bikers and fishermen. The Breedekloof district covers the upper reaches of the Breede River and its tributaries, resulting in a purest source of water (Aspect 2015). There are marked variations between the soils and mesoclimates in the various river valleys. The wards of Goudini and Slanghoek lie within the rain belt of the first range of north-south-lying mountains next to the south-western coast, where the rain is sufficient for vineyards to flourish without irrigation. The average annual rainfall is 784 mm.

Summers are warm and the mean February temperature is 21.6°C. Snow-capped mountains during winter and into spring result in a later bud break, longer hanging time and later harvest than the continental climate suggests. In summer, the prevailing south-easterly wind is funnelled through the valley, cooling the vines in the late afternoon, reducing disease pressure and limiting the use of pesticide spraying. The Breedekloof is characterised by vineyards which flourish on a flat landscape of alluvial valley soils with adequate drainage as they rest on a bed of river stones (Aspect 2015). In Goudini and Slanghoek the soils and boulder beds of mainly alluvial material range from bleached sand to dark, organic rich sand, especially near the Goudini ward. These massive alluvial deposits alternate with Bokkeveld shales in many combinations. Figure 4.18 shows the distribution of wineries on the route.

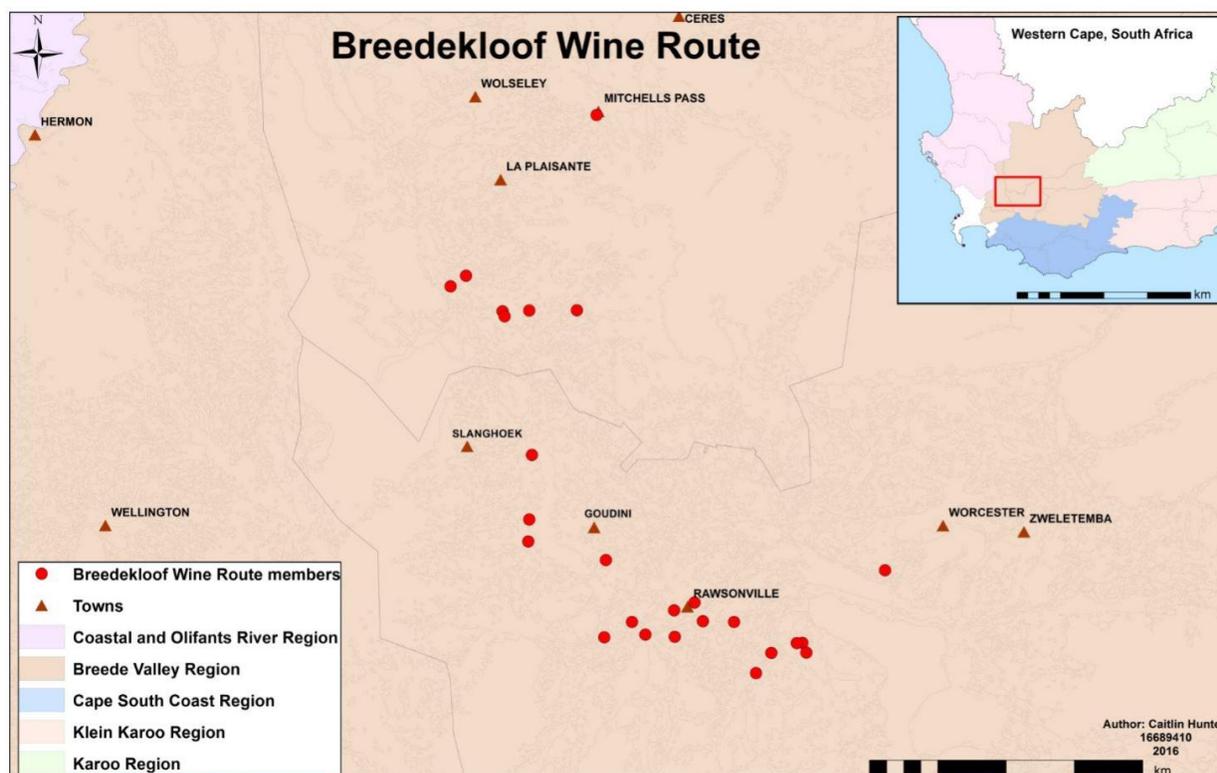
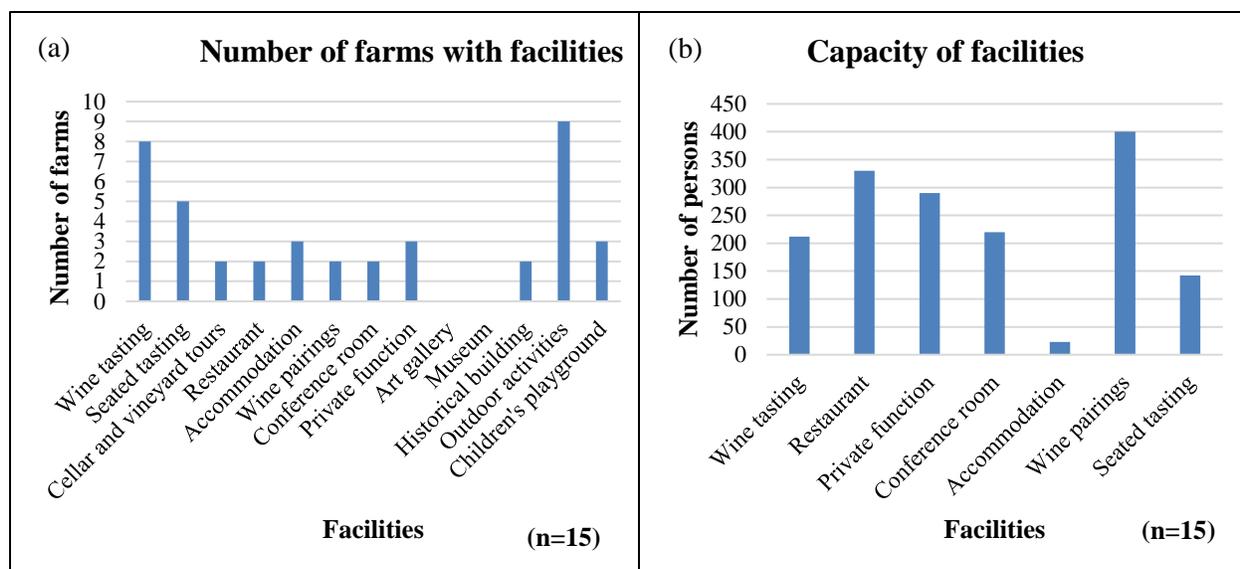


Figure 4.18 Distribution of member wineries in the Bredekloof Wine Route in the Breede Valley Region

Comprising 25 wineries, of which a third are large-scale co-operatives, the Bredekloof wineland is one of the Cape's largest wine-producing areas. Sixty per cent (15) of the wine farms and estates participated in the study. Sixty-six per cent of the wineries on the Bredekloof Wine Route are large co-operatives and company owned, only a few (34%) are privately owned. Sixty per cent of the wine farms are open to the public during the week and on weekends and 32% are open by appointment only.

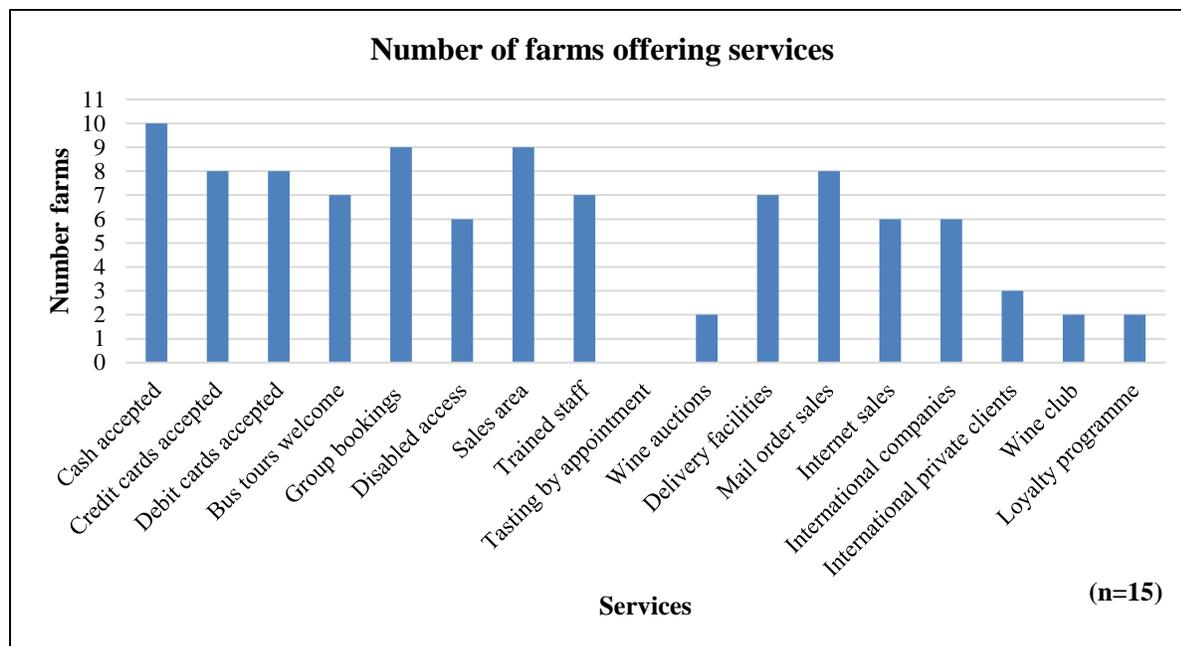
Just over half (53%) of the participating wineries offer wine tasting facilities, and one third have seated tasting (Figure 4.19a). Sixty per cent cater for outside activities. Only 20% have accommodation, private function facilities and children's playgrounds. More than 200 people can be accommodated for wine tasting (with a capacity range between 10 and 60 people), 330 in restaurants (ranging from 130 to 200 people), 290 for private functions (with a capacity range between 30 and 200) and 23 for overnight stays with a capacity range between three and 10 people (Figure 4.19b).



Source: Wine farm questionnaire survey

Figure 4.19 Bredekloof Wine Route: Number of farms with facilities and capacity of facilities

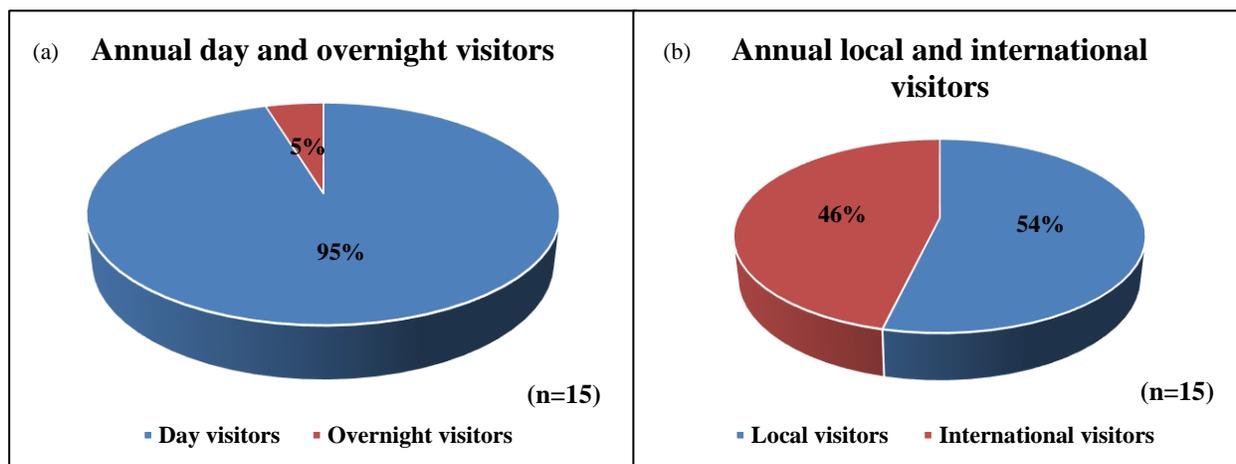
Figure 4.20 shows the available services on the participating wine farms and estates. The services are offered by between 7% and 67% of the members. Surprisingly, no participating farms offered wine tastings by appointment.



Source: Wine farm questionnaire survey

Figure 4.20 Bredekloof Wine Route: Number of wine route members offering services

Concerning the visitors to the route, the majority (95%) are day visitors (41 615) travelling locally from Cape Town, Worcester and Johannesburg (Figure 4.21a). The local visitors account 54% (3250) while the international visitors account for 46% (2800) (Figure 4.21b). The international visitors are mainly from Germany, the United States and the United Kingdom. Local visitors spend R100 to R500, while international visitors spend roughly R100 to R1000 per person per day.



Source: Wine farm questionnaire survey

Figure 4.21 Bredekloof Wine Route: Visitor origins and stays

The Bredekloof Wine Route has satisfactory capacity ranges for its facilities on this route. Future facility developments should focus on providing more restaurants and accommodation since it is evident that there is good component of international visitors who could be attracted to stay overnight instead of travelling to Worcester or surrounding towns for accommodation. The development scores range from 58 (Opstal Estate) down to Waboomsrivier Wine Cellar (1). Majority of the participating members received scores between seven and 33. Sixty-six per cent of the participating members on the route is large co-operatives, cellars and company owned. It is interesting to note that the latter mentioned members are involved in tourism activities and allow visitors to visit the large cellars.

4.2.3.5 Stellenbosch Wine Routes: Not just an oak tree town

Location, historical and tourism contexts

The history, culture, natural beauty, sport, education and wine have made the name Stellenbosch resonate around the globe as one of South Africa's premier tourist, viticultural, business and educational places. The recorded history of Stellenbosch dates to 1679 when the name was given to a small island on the Eerste River (First River) by Simon van der Stel, governor of the Cape. Prior to

European settlement the area was home to various indigenous communities. The Eerste River was so named as it was the first river east of Cape Town that the Dutch settlers came upon after leaving their base at Table Bay (Stellenbosch Wine Routes 2016, SA-venues 2016). The Stellenbosch area's agricultural potential was recognised early. The area's soils and climate were suitable for producing vegetables to sustain the ships passing the victualing station at the Cape of Good Hope en route to Dutch colonies in the East (Stellenbosch Travel 2016). The thirst of the Dutch and other settlers led to the making of good wine and so the hills and valleys around Stellenbosch were soon planted with vines and other agricultural crops. Skilled vintners were sent to the area and the fruit of the vines established Stellenbosch as a world-renowned producer of quality wines, the vine being the region's most prominent agricultural feature to this day (Stellenbosch Wine Routes 2016; SA-venues 2016). Although Stellenbosch has seen rapid residential and commercial growth over the past few decades, the heart of the town still resonates with an historical atmosphere and cultural allure (Ferreira 2007). The buildings reflect over three centuries of occupation, including Dutch, Georgian and Victorian architecture (Stellenbosch Travel 2016). The myriad museums and places of interest are tourist attractions along the oak-lined streets. The crests of the mountains that almost dramatically encircle the town, namely the Stellenbosch Mountains, Jonkershoek Mountains and Simonsberg, are visible from most places in the town. Figure 4.22 shows the winescapes surrounding the town of Stellenbosch.



Source: Stellenbosch Wine Routes (2016)

Figure 4.22 Stellenbosch town and winescapes of the Stellenbosch Wine Route

The beautiful streets of the Stellenbosch town along with the winescapes of the Stellenbosch Wine Routes is shown in Figure 4.22. The bottom image shows the view from Stark-Condé in the Jonkershoek Valley.

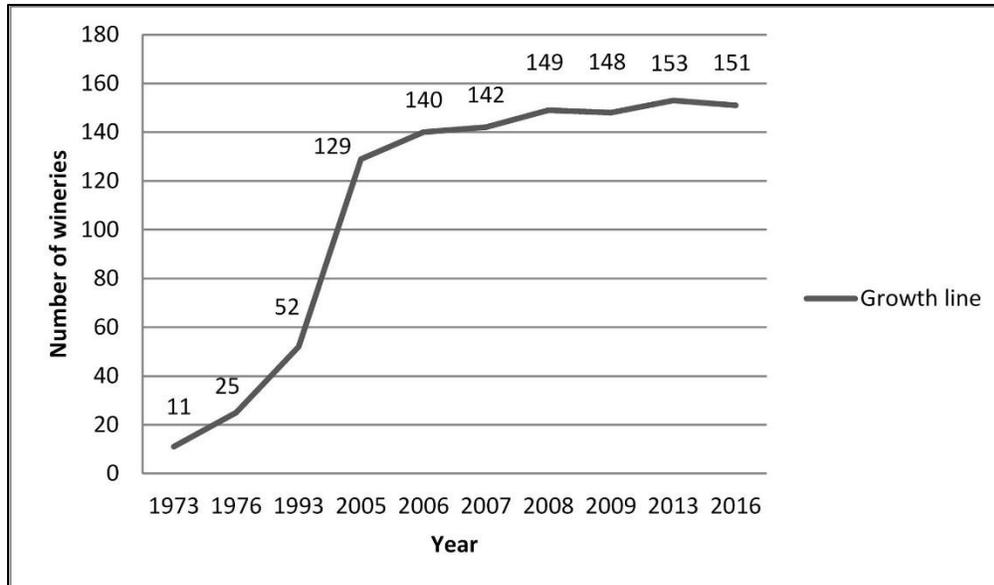
The Lanzerac Wine Estate (one of the 152 members on the SWR) has a history dating back to 1692 and is situated in the foothills of the Jonkershoek Valley. The estate speaks of Old-World charm and rich Cape Dutch heritage, surrounded by big oak trees. The five star Lanzerac Hotel is one of the most distinguishable examples of Cape Dutch architecture, blending both period grandeur and contemporary style, with more than 48 suite bedrooms. The wine tasting room is the perfect place to taste the beautiful wines produced and also enjoy it with various pairings. The luxury estate also offer visitors a spa experience and modern cuisine at the restaurant, casual delicatessen, picnic area and landscaped gardens and beautiful venue spaces for weddings and functions (Lanzerac 2016). According to the weighted assessment framework the Lanzerac Wine estate is one of the top five winery nodes and is seen as one of the ‘wine resorts’. Meinert Wines is a small producer located in Devon Valley in Stellenbosch. Visitors can taste their wines by appointment only and will be spoilt with personal stories. However, these wines can be bought online and includes a Cabernet Sauvignon, Merlot, Semillon Straw Wine and ‘The German Job Riesling’ (Meinert Wines 2016).

Geographical factors for the production of quality wine grapes

The mountainous terrain, good rainfall, deep well-drained soils and diversity of terroirs are key contributors to making this a premier viticultural area. Stellenbosch has the most vineyard plantings in the winelands. Conditions in this district are particularly well suited to many of the noble grapevine varieties (Aspect 2015). The sands and alluvial soils of the valley floors give way to predominantly granitic and shale yellow and reddish Oakleaf and Tukulu soils on the slopes. The average rainfall in the district is 600-800 mm a year (Aspect 2015). The rapidly increasing number of wine route estates and producers (more than 150) includes some of the most famous names in Cape wine. The district produces excellent examples of almost all the noble wine-grape varieties and is known for its blended reds. This intensively farmed district, which has been divided up into several smaller viticultural pockets, is a very sought-after address for quality wines, in particular the western, southwestern and southern slopes of Simonsberg, the Bottelaryberg, Stellenbosch Mountain and Helderberg (Platter 2016). These viticultural zones are characterised by yellow-brown to reddish-brown, deeply weathered foothill soils with good drainage and water-holding properties, typically situated at altitudes of 150-400 m.

The Simonsberg-Stellenbosch ward encompasses several well-known estates and private cellars. Here the mean February temperature is 21.5°C and the average annual rainfall 600-700 mm (Aspect 2015). This ward has predominantly south-westerly aspects and, because of altitudes commonly higher than 200 m, it is generally open to the cool south-westerly summer breezes originating from False Bay some 25 km away. The wines from this ward are predominantly red, made from Cabernet Sauvignon, Merlot and Shiraz, and the wines made from the locally-bred Pinotage variety regularly reap domestic and international awards. Four wards have been demarcated in the Bottelary hills in the Stellenbosch district, all benefiting from cooling summer breezes, namely Papegaaiberg, Devon Valley, Bottelary and Polkadraai Hills. Several estates and private cellars are distinguished for their quality wines in these wards, especially the Bottelary ward where Pinotage is prominent (South African Tourism 2016). The scenic Jonkershoek Valley, home to several top producers and boutique wineries, has a high annual rainfall more than 1000 mm midway up the valley and the landscape is dominated by the majestic Twin Peaks which tower to 1494 m. The higher elevations and textured soils, make the valley ideal for growing Cabernet Sauvignon and other Bordeaux varieties (Platter 2016). Banghoek is relatively new as a viticultural area with most vineyards planted in the last 20 years. It is mainly known for Sauvignon Blanc and red Bordeaux varieties.

In 1971 Stellenbosch became the first wine region in South Africa where a wine route was established as an organised network of wineries where tourists could taste and buy the product of the vine at the cellar door and experience the soul of the region's winelands. The pioneer SWR was officially launched in April 1973 (Ferreira & Muller 2013). The SWR currently provides a coordinated network of more than 150 wineries, each offering an exclusive cellar-door experience for the wine lover and tourist. Figure 4.23 illustrates the growth of SWR members between 1973 and 2016.



Source: Adapted from Ferreira & Muller (2013)

Figure 4.23 Growth of the Stellenbosch Wine Routes, 1973 to 2016

The SWR comprises five subroutes each characterised prominent wine styles, climates and geographical location, namely Bottelary Hills, Greater Simonsberg, Helderberg, Stellenbosch Valley and Stellenbosch Berg. The subdivisions (only for administrative reasons) make travelling along the route more user friendly. These subroute demarcations and names are based on location and have no relationship to the Wine of Origin system or wards in the Stellenbosch region. Figure 4.24 shows the distribution of the participating members of SWR (Stellenbosch Wine Routes 2016).

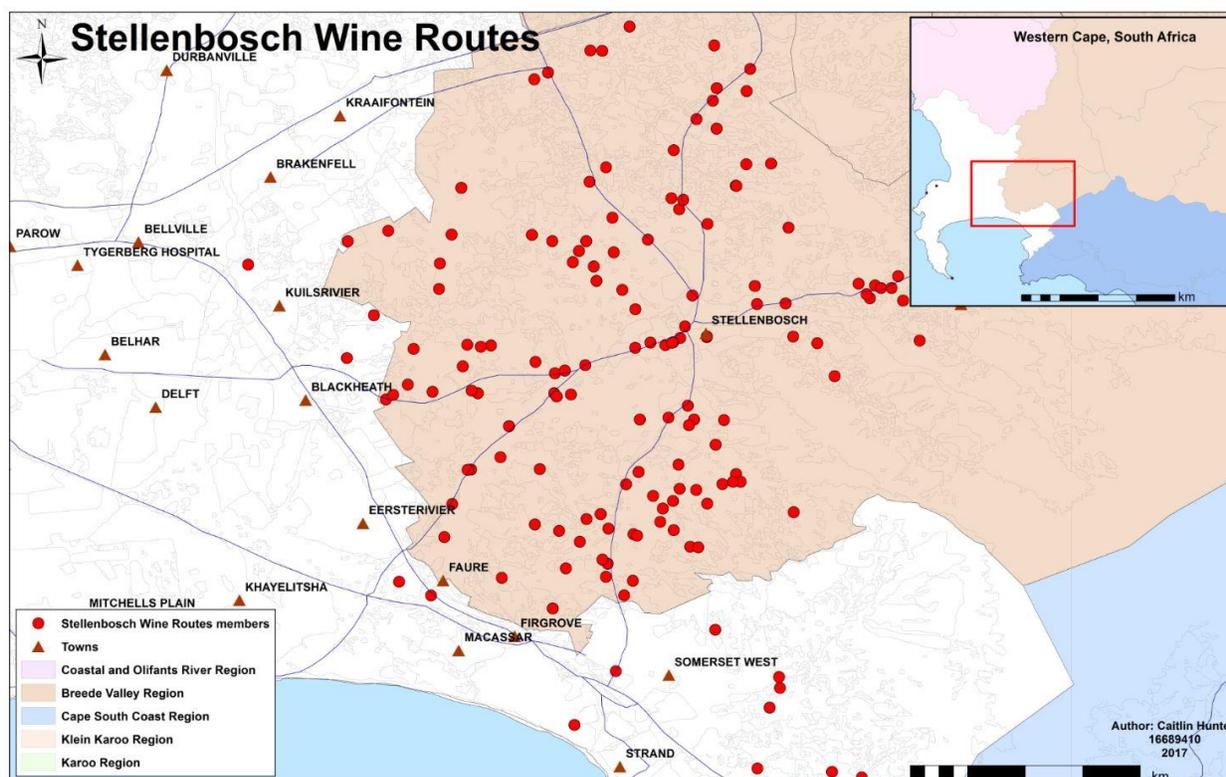
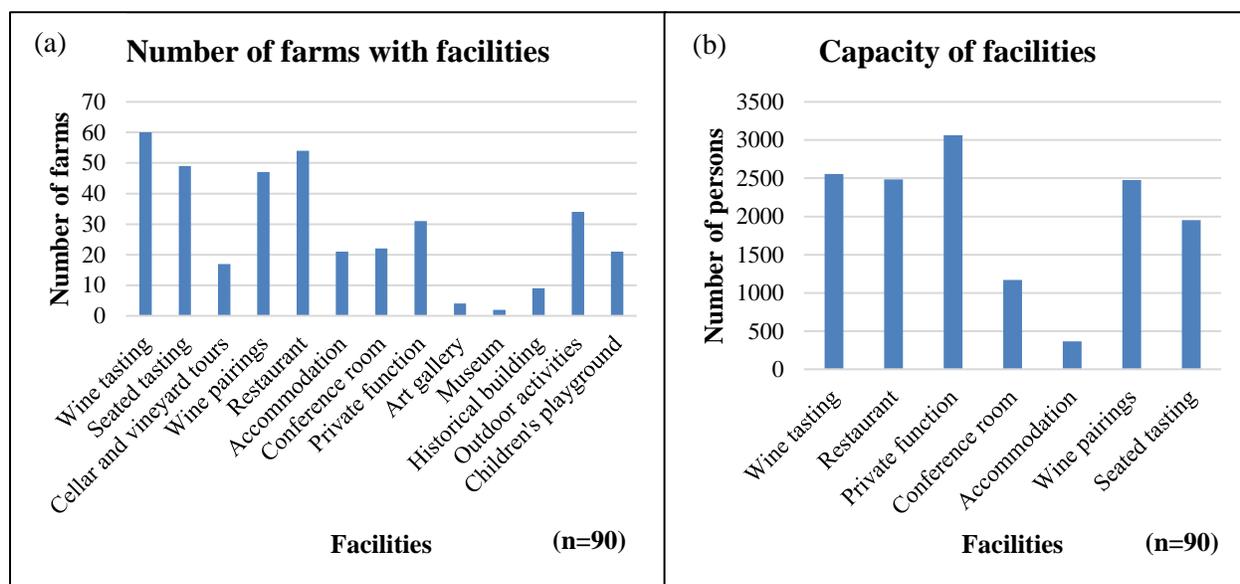


Figure 4.24 Distribution of member wineries in the Stellenbosch Wine Routes in the Breede Valley Region

The majority (72%) of the participating wine farms on this route operate as private owners, while 28% are companies, co-operatives, trusts and family-owned wine farms. The member wineries are open to the public, for wine tasting, dining and various other activities. Eighty per cent of the of the route members are open to the public. Fifty-nine per cent (90) of the 152 members participated in the research.

SWR is exceptional and offers the widest range facilities, services and supplementary activities of all South Africa's wine routes. Figure 4.25a presents the types of facilities offered by the participant members of the route. Sixty-seven per cent of the farms offer wine tasting, 59% have restaurants and eateries, 54% have rooms for seated tastings and 52% offer wine pairings. Surprisingly, few have facilities for outdoor activities (36%) like horse riding, hiking trails and mountain bike trails, private function venues (34%), accommodation (28%), conference venues (24%), children's playgrounds (23%), cellar and vineyard tours (20%), historical buildings (10%), art galleries (2%) and museums (1%). SWR offers a diverse range of accommodation types including self-catering units, manor houses, B&Bs, hotels and spas. The restaurants on the route farms include cafés, coffee shops, bistro's as well as breakfast, lunch and dinner restaurants with fine dining (food and wine pairings) and informal

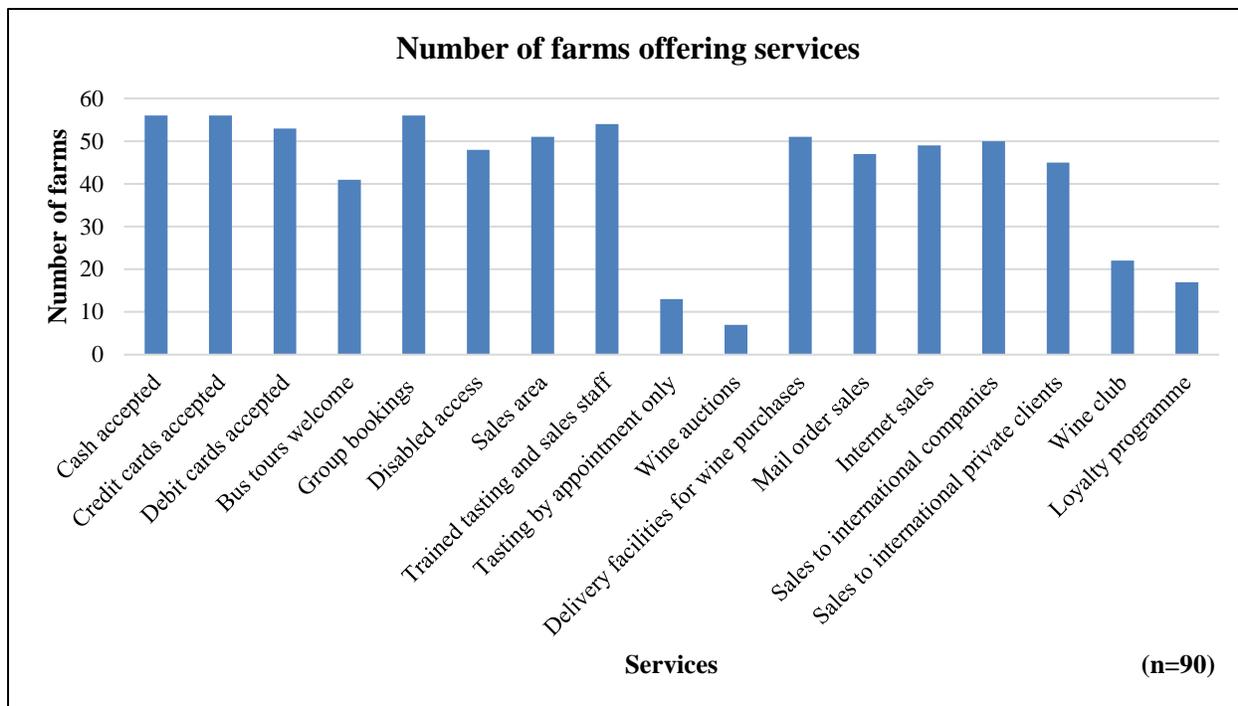
platters. Figure 4.25b shows that about 2500 people can be accommodated each for wine tastings (with a capacity range between two and 120) in restaurants (with a minimum of five people and a maximum of 200) and at wine pairings (with a minimum of two people and a maximum of 120). About 3000 people can be accommodated for private functions (with a capacity range between 12 and 400 people), almost 400 for overnight stays (with a minimum of two people and a maximum of 100 people) and about 1100 in conference rooms, with a capacity range between 10 and 350 people).



Source: Wine farm questionnaire survey

Figure 4.25 Stellenbosch Wine Routes: Number of farms with facilities and capacity of facilities

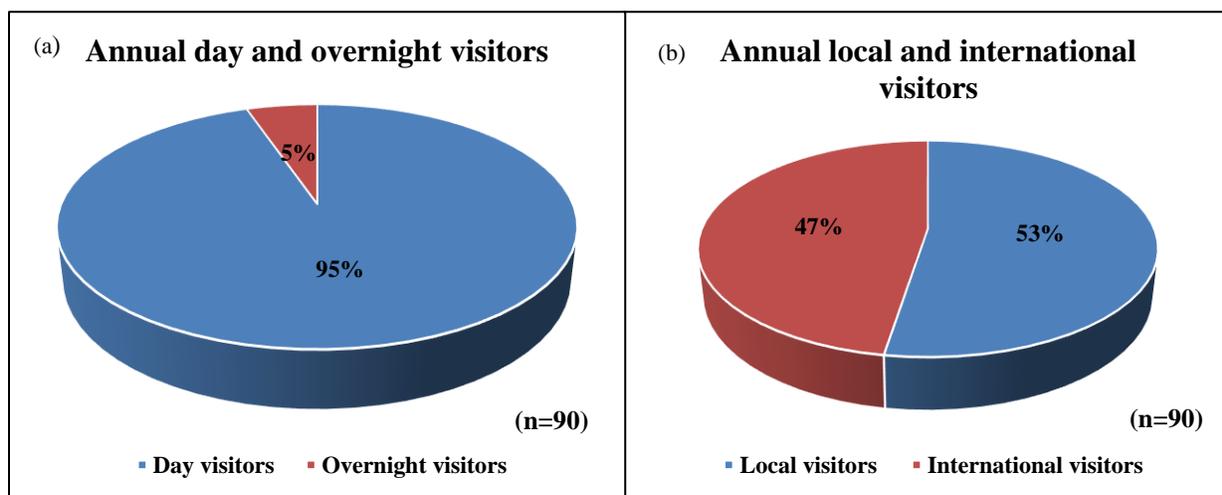
Figure 4.26 shows the number of farms offering services on the route. Twelve of the 17 services are offered by 50% or more of the participating farms on the SWR. Twenty-three per cent or less of the farms provide tasting by appointment (13%), do wine auctions (9%), have a wine club (23%) or loyalty programmes (20%).



Source: Wine farm questionnaire survey

Figure 4.26 Stellenbosch Wine Routes: Number of wine route members offering services

The number of visitors to a route is a good indicator of the popularity of a route. The SWR not only has the most members of all the wine routes but also receives the most visitors annually (more than 350 000) according to this study. Figure 4.27a shows that majority (95%) of the visitors to the route are day trippers given the dense distribution of the wine farms and estates, and the close proximity of the route to Cape Town.



Source: Wine farm questionnaire survey

Figure 4.27 Stellenbosch Wine Routes: Visitor origins and stays

The split between international (47%) and local (53%) visitors is quite even, indicating similar popularity with and attraction for both local visitors and international (Figure 4.27b). The annual combined number of visitors (local and international) is about 350 000. Local visitors to SWR travel from Stellenbosch, Cape Town and environs and Gauteng. International visitors mainly come from Germany, the UK, Netherlands, USA and Sweden. Local visitors spend between R100 and R2000 per visitor per day and international visitors spend up to R2200 each per day.

SWR receives more than 350 000 visitors annually and it has a well-established and functioning tourism bureau. The challenge facing the Stellenbosch Wine Region is ongoing innovation of the product portfolio to maintain and even surpass the status quo. Recall that there are three key success factors in wine-tourism regions, namely the quality and number of wineries (critical mass); a region's physiographical appeal; and how cultural-tourism products augment the product. In South Africa, the Stellenbosch-Franschhoek-Paarl winelands or winescapes endure in the minds of local and international wine tourists. The highest development score received by participating members of the SWR is 63 (Lanzerac Wine Estate). Furthermore, 32 wine farms received a score above 30. The lowest score achieved is one, by Meinert Wines. SWR has a wide variety of tourist experiences and products, satisfying the needs of every tourist. Thus, not all the farms are focused on wine tourism offerings.

4.2.3.6 Franschhoek Vignerons: The French corner

Location, historical and tourism contexts

Individual Huguenots began to settle in the Cape from 1671 onwards. From 1688 to 1689 a large number fled religious persecution as protestant-reformed Christians in France and emigrated to the Cape of Good Hope (History & Heritage of Franschhoek 2016). The name 'Franschhoek' stems from the Dutch phrase 'Fransche Hoek' ('French corner') because of the significant number of French nationals living there (History & Heritage of Franschhoek 2016). Most of the farms in the Franschhoek area still have their original French names, some farms complemented by a spectacular Cape Dutch homestead, soaring oaks and rolling vineyards. The town's main street is replete with world-class shops and boutiques for an intimate and relaxed shopping experience for wine, jewellery, designer clothing, artworks, a special gift, collectable books or chocolate (Franschhoek Wine Valley 2016). Many of the wine estates also have deli's serving freshly-baked breads, olives and olive oils, charcuteries and more. Franschhoek is home to some of the country's finest art offerings and a growing number of local and international art enthusiasts. Consequently, Art Franschhoek, which showcases these and more, was

established. The route now aims to promote fine art in the valley as a companion to its food and wine (The Franschhoek Wine Route 2016). A wine tasting with a difference is provided by a ride on the Franschhoek Wine Tram (Figure 4.88). Passengers aboard the hop-on hop-off tour experience the Franschhoek Valley in a novel and leisurely way as they journey through rolling vineyards stopping in at a selection of Franschhoek wine estates. Energetic tourists can walk mountain trails, particularly in the Mont Rochelle Nature Reserve, hire a bicycle to explore on their own or visit wine tasting venues on horseback. Polo is played at Val de Vie or a game of golf can be played at the breath-taking and award-winning Pearl Valley golf course (Franschhoek Wine Valley 2016).

Visitors will discover a collection of wine farms ranging from quaint boutique wineries that cater for those searching for something special to the large cellars offering organised tours and tastings. The Franschhoek Wine Valley is home to some of South Africa's noble cultivars and classic styles (South African Tourism 2016). These range from superb whites, such as Sauvignon blanc, Chardonnay, Sémillon and Chenin blanc, to the powerful reds of Cabernet Sauvignon, Shiraz, Pinot noir and Merlot. The area also produces some of the country's extraordinary Méthode Cap Classique sparkling wines which can all be enjoyed during a trip along the Franschhoek MCC Route. Visitors can be enlightened about all the area offers with a journey along the recently launched Franschhoek Wine Valley Food & Wine Route (Franschhoek Wine Valley 2016). This exciting initiative builds on Franschhoek's reputation as the Gourmet Capital of South Africa which takes the food and wine experience to a new level. Venues on the route offer visitors an array of innovative food, wine and lifestyle experiences unparalleled in the Cape Winelands. Franschhoek also prides itself with their annual Bastille Festival and the Cap Classique and Champagne Festival.

Grande Provence Heritage Wine Estate has a 300-year history covering about 47 hectares. Visitors can expect rows of vineyards when entering the estate and perfectly clipped hedges, young olive trees and ancient oak trees across the estate. The estate offers visitors experiences at The Winery, The Restaurant, The Gallery, The Shop and boutique accommodation in The Owner's Cottage. Grande Provence is an elegant estate with focus on families seeking to escape the hustle of the city. The Restaurant is open daily for lunch and dinner with cuisine referencing the Estate's French Heritage. Visitors can also experience private dining indoors and outdoors, weddings, honeymoons, food and wine pairings and a venue for corporate retreats. Grande Provence also offer six different packages focusing on 'heartland offer', 'gourmet', 'wine lovers', 'family', 'romance' and '4 for 2' (Grande Provence 2016). The Véraison Vineyard was initially the premier cultivator for roses in South Africa. The wines produced spend nine to 16 months in Fresh oak barrels and four to five years in the cellar. The Vineyard is focused on producing a limited quantity of Cabernet Sauvignon. Two wines are produced, namely a reserve 'V' series and a 'Q' series. Visitors can taste the wine only by appointment (Véraison Vineyard 2016). Figure 4.28 shows a tourist activity and landscape of Franschhoek.



Source: Franschhoek Wine Valley (2016)

Figure 4.28 Tourist facility and winescape on the Franschhoek Vignerons

The Franschhoek Wine Tram is a popular activity when exploring the Franschhoek Wine Route. Figure 4.28 also shows the colourful vineyards of the Franschhoek winescape.

Geographical factors for the production of quality wine grapes

The district lies southeast of Paarl and is enclosed on three sides by towering mountains, including the Groot Drakenstein and Franschhoek mountains that meet at the head of the valley, while the Klein Drakenstein mountains and Simonsberg stretch toward Paarl (Aspect 2015). Streams from the higher

peaks flow down to the valley floor where they converge to form the Berg River, fast-flowing in winter, when snow regularly covers the mountain tops, and a mere stream fed by the Wemmershoek Dam in summer (Platter 2016). The average annual rainfall is 900-1050 mm. The mean February temperature is 23°C. The climate and soil conditions vary considerably. Vines are planted on the banks of rivers and up mountain slopes, resulting in a wide range of grapes and wines. The prevalent white-wine varieties are Sauvignon Blanc, Chardonnay and Sémillon. Cabernet Sauvignon, Shiraz and Merlot are the main red-wine varieties. The valley is recognised for the quality of its Cabernet Sauvignon, Chardonnay and Sémillon. There are Sémillon vines in the valley which are older than 100 years (Aspect 2015).

There was a 62% participation rate by the 52 route members. Eighty per cent of the wine farms on the Franschhoek Vignerons are privately owned and 20% are company owned. The majority of the venues are open to the public in the week and on weekends. Figure 4.29 shows the distribution of the member farms on the Franschhoek Vignerons.

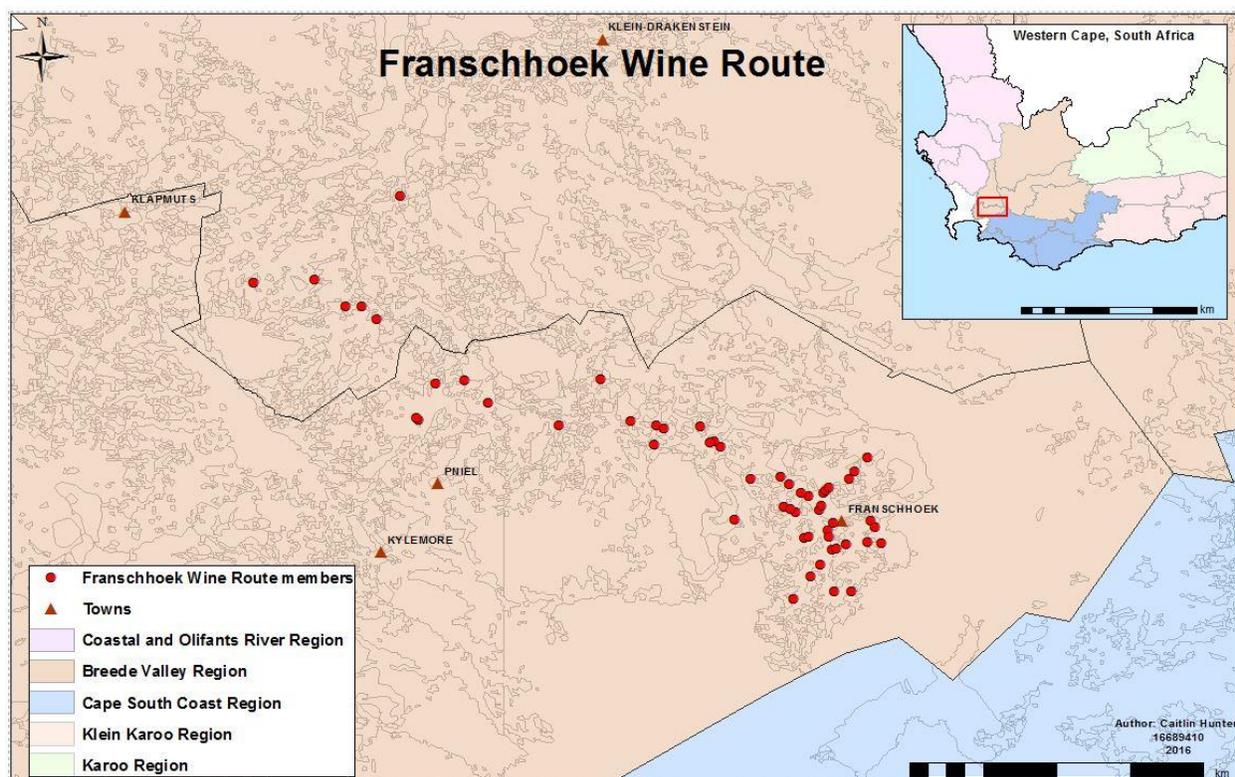
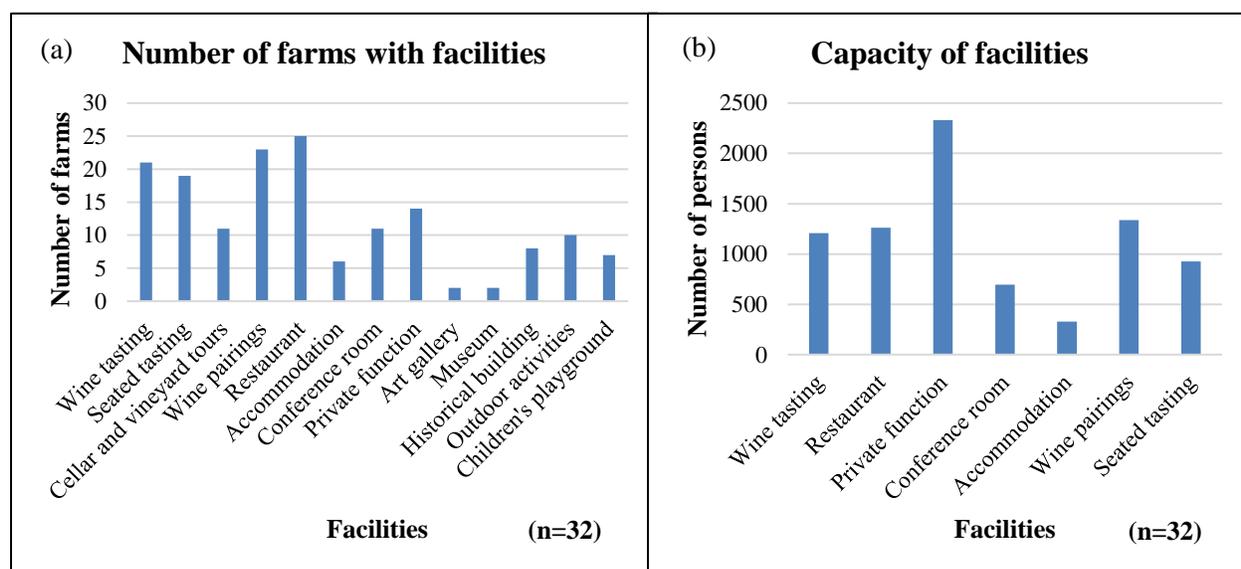


Figure 4.29 Distribution of the member wineries on the Franschhoek Vignerons in the Breede Valley Region

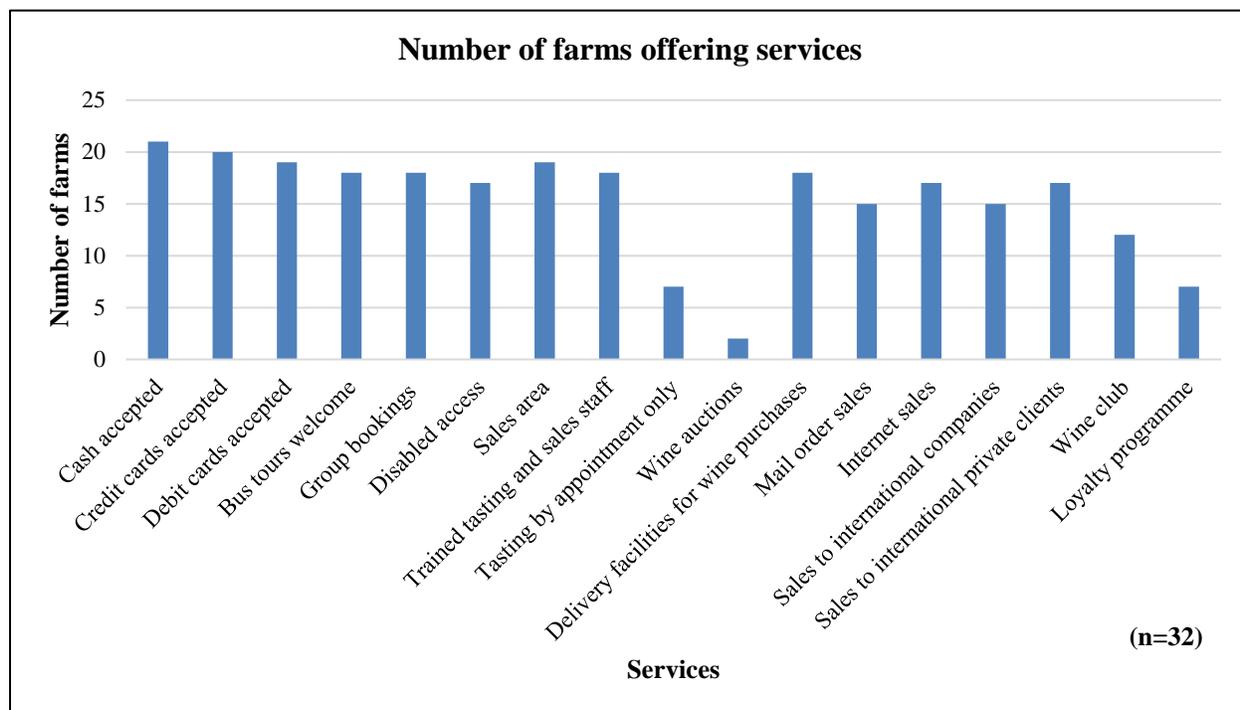
More than 50% of the member farms on the Franschhoek Vignerons offer restaurants and eateries (78%), wine pairings (72%), wine tasting (66%) and seated tastings (56%) (Figure 4.30a). More than 30% of the farms offer cellar and vineyard tours (34%), conference rooms (34%), private function venues (41%) and outdoor activities (31%). Few of the route's farms have historical buildings (25%), children's playgrounds (22%), accommodation (19%), art galleries (6%) and museums (6%). The restaurants and eateries comprise cafés, coffee shops, bistro's, and an array of restaurants serving breakfast, lunch and dinner. Regarding the capacity of facilities, more than 1200 people can be accommodated at wine tasting (with a capacity range between eight and 120), about 1400 at wine pairings (ranging between 6 and 120), over 1200 in restaurants (ranging between 25 and 310) and 2300 in private function venues (ranging between 20 and 1000) (Figure 4.30b).



Source: Wine farm questionnaire survey

Figure 4.30 Franschhoek Vignerons: Number of farms with facilities and capacity of facilities

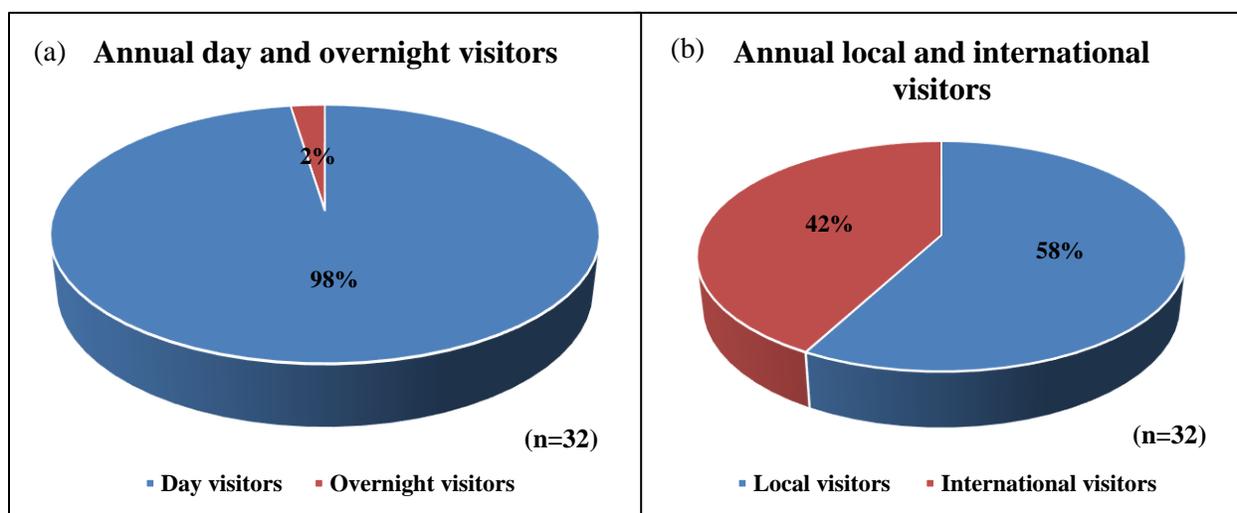
Eleven of the 17 services are provided by 50% or more of the farms on the route. Tasting by appointment, wine auctions, wine clubs and loyalty programmes feature on a few farms only (Figure 4.31).



Source: Wine farm questionnaire survey

Figure 4.31 Franschhoek Vignerons: Number of wine route members offering services

Figure 4.32b shows that majority (58%) of the visitors visiting the Franschhoek Vignerons are local visitors (129 874 in 2016), and 42% were international visitors (94 758) who came mostly from Germany, the United Kingdom, France and the Netherlands.



Source: Wine farm questionnaire survey

Figure 4.32 Franschhoek Vignerons: Visitor origins and stays

Most local visitors came from Cape Town and surrounding towns as well as Johannesburg. Day visitors accounted for a clear majority (98%) of the 243 926 visits to the wine route with only a few overnight visitors (2%) (Figure 4.32a). The local and international visitors spend between R100 and R1000 per visitor per day.

The popularity of the Franschhoek Vignerons relates to the many facilities offered and is reflected in the more than 200 000 visitors (local and international) attracted annually. The highest development score from the 319 participating wine farms is 66 (Grande Provence Heritage Wine Estate). It is clear from the discussion that this estate offers visitors more than just wine, with wine still at the centre of all the experiences. The lowest score (one) received by the Franschhoek Wine Route is by Véraison Vineyard. The discussion on this farm also shows that the focus is on producing wine and not on selling a tourist experience.

4.2.3.7 Paarl Wine Route: Diamond and pearl mountain

Location, historical and tourism contexts

The Paarl Wine Route is also known as Paarl Vintners. The area known as Paarl was first inhabited by the Khoikhoi and San. The Peninsular Khoikhoi and the Cochoqua clan lived in this area divided by the Berg River Valley (Paarl History 2016). The Cochaqua were cattle headers and among the richest of the Khoikhoi tribes. They had almost 18 000 members and they called Paarl Mountain, Tortoise Mountain. The Dutch East India Company established meat-trading relationships with the Khoikhoi on the Table Bay coastline and in 1657, in search of new trading relationships inland, Abraham Gabemma saw a giant granite rock glistening in the sun after a rainstorm and named it ‘de Diamondt en de Peerlberg’ (Diamond and Pearl Mountain) from which ‘Paarl’ is derived (Paarl History 2016). The ‘diamonds’ disappeared from the name and it became known simply as Pearl Rock or Pearl Mountain. Paarl is the third oldest European settlement in South Africa and is home to a culturally diverse community. The birth of Afrikaans here is commemorated by the Afrikaans Language Monument on the southern slopes of Paarl Mountain (Paarl Winelands 2016). The town has many examples of Georgian, Victorian, Edwardian and Cape Dutch buildings and wide variety of fine restaurants and coffee shops spread along the 12-kilometre-long Main Street (Paarl Winelands 2016). Near Paarl is the Drakenstein Prison, where Nelson Mandela spent his last years of captivity and from which he completed his ‘long walk to freedom’ (Paarl History 2016). The town has

conference venues and some of the most idyllic wedding venues in the Cape Winelands. Adventure tourists can enjoy outdoor activities such as hiking, mountain biking, horse riding, polo, golfing, canoeing, bass fishing, fly-fishing as well as visits to the Drakenstein Lion Park, Le Bonheur Crocodile Farm and the Alpaca Loom with its touch farm for the children. Paarl's Main Street further offers shopping experiences including lifestyle stores, antiques shops, art galleries, craft shops, gift shops, cafés and bistros (Paarl Wine Farms 2016). Paarl Mall located close to the N1 highway with some 95 stores, Frater Square, offers a shopping experience in an historic building that has been transformed into a Lifestyle Centre. Shopping is not limited to the town as the wine and fruit farms in the area offer wine, spirits, cheese, fruit, olives, olive oil, arts and crafts, delis and restaurants. Culture heritage tourists can visit the Afrikaans Language Monument and Museum, the Anglo-Boer War Monument, Augusta Kleinbosch Guest Farm, Het Gestricht Museum, Paarl Museum, the Strooidak Church or take a Paarl Historical Walk tour (Paarl History 2016).

The Drakenstein area has 70 wine producers ranging from very large co-operative cellars to historic family-owned estates. The Paarl district was awarded Wine of Origin status in 1972 and the district encompasses the wards of Wellington, Simonsberg-Paarl and Voor-Paardeberg, while Franschhoek, a former ward, became a district in its own right in 2010. Surrounded by the picturesque Groot Drakenstein, Franschhoek, and Klein Drakenstein mountains to the south, south-east and east, the Paarl Wine Route combines old-world charm with new-world-style winemaking. The route is home to the KWV, the first branded wine cellar in the country. The world-renowned Nederburg Auction is held here too (South African Tourism 2016; Paarl Winelands 2016).

Backsberg has an array of wine ranges including the Family Reserve Range, Black Label Range, Premium Range, Kosher Range, Tread Lightly by Backsberg, fortified and sweet wines and some brandy ranges. Michael Back was given the Lifetime Achievement Award for his contribution to the environment, sustainability, ethical practices and education (Backsberg 2016). Underlining its impeccable green credentials, and just ahead of the farm's centenary in 2016, Backsberg gained the Amorim Sustainability Award for Wine at the annual The Drinks Business Green Awards ceremony and the winery has won four medals at the Old Mutual Trophy Wine Show. Backsberg also boasts with a tasting room, restaurant and wedding venue (Backsberg 2016). Freedom Hill Vineyards dates back to 1699 and are situated between Franschhoek and Paarl on the hills of the Wemmershoek Mountains. The name is derived from the view overlooking the Victor Verster prison where former President

Nelson Mandela took his first steps to freedom. Wine ranges include the Freedom Hill Wine range and the Freedom Walk Wine range. Visitors are offered an escape from the city to taste their wine in the tasting room or outside on the veranda. The farm also offers interesting wine pairings (Toffee and nut wine pairing), private tastings, platters and a function venue (Freedom Hill 2016). Two Paarl winescapes are illustrated in Figure 4.33.



Source: South African Tourism (2016)

Figure 4.33 Winescapes and wine farm of the Paarl Wine Route

Figure 4.33 shows the vineyards of the Boland Cellar, the restaurant at Laborie and the scenic winescapes of the Paarl Wine Route.

Geographical factors for the production of quality wine grapes

The Paarl wine district is bordered by Wellington to the northeast and the mountains of the Groot and Klein Drakenstein and Franschhoek ranges to the southeast. Paarl has a typically Mediterranean climate (Aspect 2015) with summers that are long and warm, the mean February temperature registering 23.2°C. The Berg River flows through the length of the valley and supplies a natural water source for irrigation. The average annual rainfall varies between 800 and 900 mm. The main soil types are Table Mountain sandstone-derived soils along the Berg River, granite soils in the vicinity of Paarl itself and weathered shales to the north. Paarl district has various mesoclimates that promote a wide range of grape varieties in the second-most vineyard plantings of the winelands. The varieties with the best potential are Chardonnay, Chenin blanc, Cabernet Sauvignon, Pinotage and Shiraz. Recently, typical Mediterranean varieties such as Viognier and Mourvèdre have been planted on the warmer slopes. The Paarl district encompasses two wards, each with its own characteristics. Simonsberg-Paarl

on the northern and eastern foothills of the Simonsberg, has prime wine-growing terroir recognised for Chardonnay, Shiraz and red blends, while Voor Paardeberg, with its distinctive granite outcrop, has long been a source of top-quality grapes for top producers (South African Tourism 2016). The Paarl Wine Route (Figure 4.34) is also known as the ‘Red Route’ because of its legendary red wines. Cabernet Sauvignon and Shiraz wines have established Paarl’s place on the global wine map and the region’s wineries have frequently received international awards for these wines.

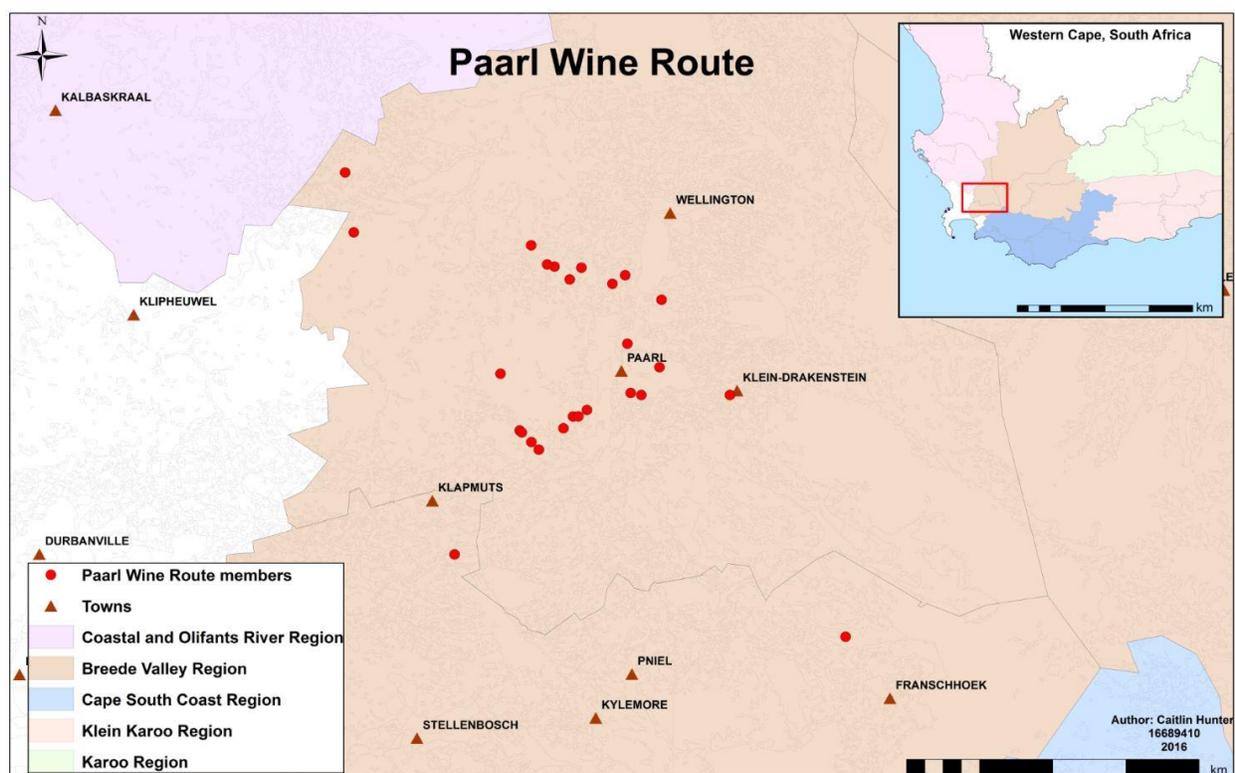
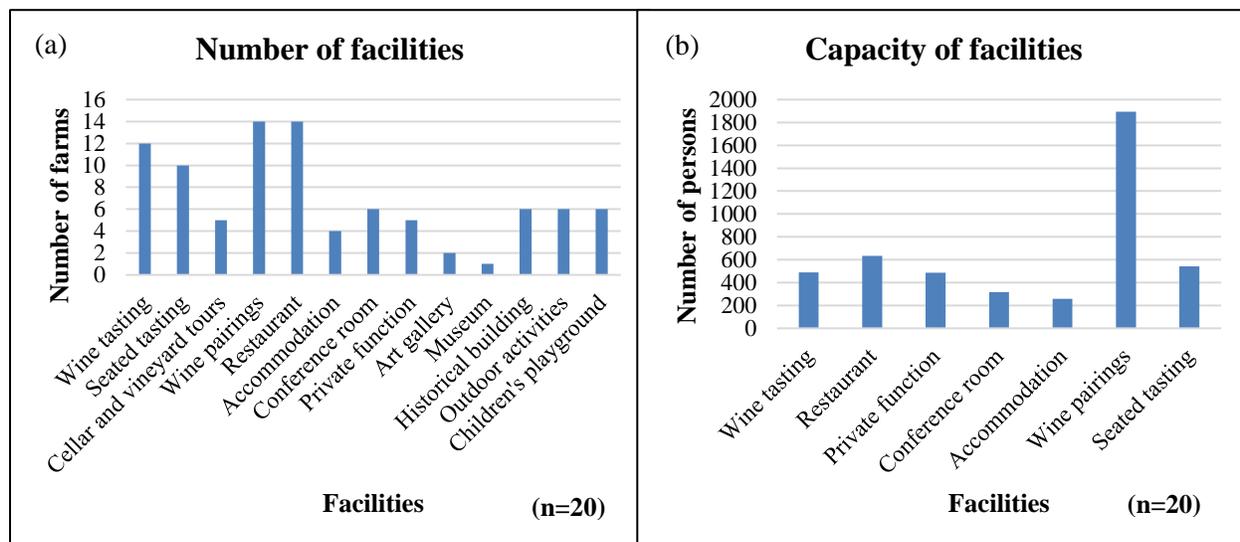


Figure 4.34 Distribution of member wineries in the Paarl Valley Wine Route in the Breede Valley Region

The route has 26 route members, with a 77% participation in this research. Paarl is home to some craft breweries and some well-known olive and olive oil producers. Forty-one per cent of the wine farms are privately owned, company-owned wine farms account for another 41% and the remaining 18% comprises family-based, co-operatives and proprietary companies.

Fifty per cent or more of the wine farms offer restaurants, wine pairings, wine tasting and have a seated tasting room. Museums, art galleries, accommodation, private function venues, children’s playgrounds, outdoor activities, historical buildings and conference rooms are featured on 30% or fewer of the farms (Figure 4.35a). Accommodation is provided in bed and breakfasts and self-catering chalets, while the restaurants and eateries include cafés, coffee shops and bistro’s. Breakfast, lunch and

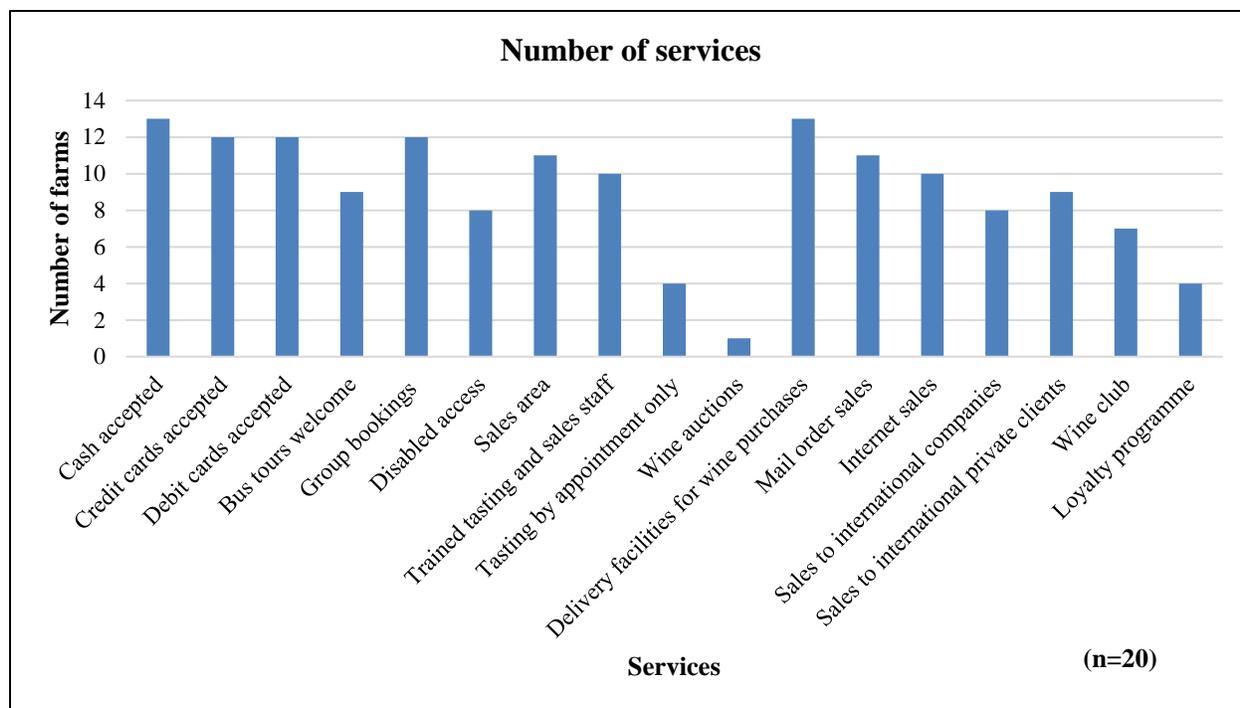
dinner as well as platters are served. The facilities can accommodate 490 people for wine tasting (ranging between 20 and 100 people), just over 600 people in the restaurants and eateries (with a capacity range between 35 and 150 people), around 500 people in the private function venues (with a capacity range between 20 and 200 people) and about 200 overnight visitors with a capacity range between 10 and 220 people. Significantly, nearly 1900 can be accommodated for wine pairings. The latter is due to one wine farm able to accommodate a maximum of 700 people on their outdoor lawns (Figure 4.35b).



Source: Wine farm questionnaire survey

Figure 4.35 Paarl Valley Wine Route: Number of farms with facilities and capacity of facilities

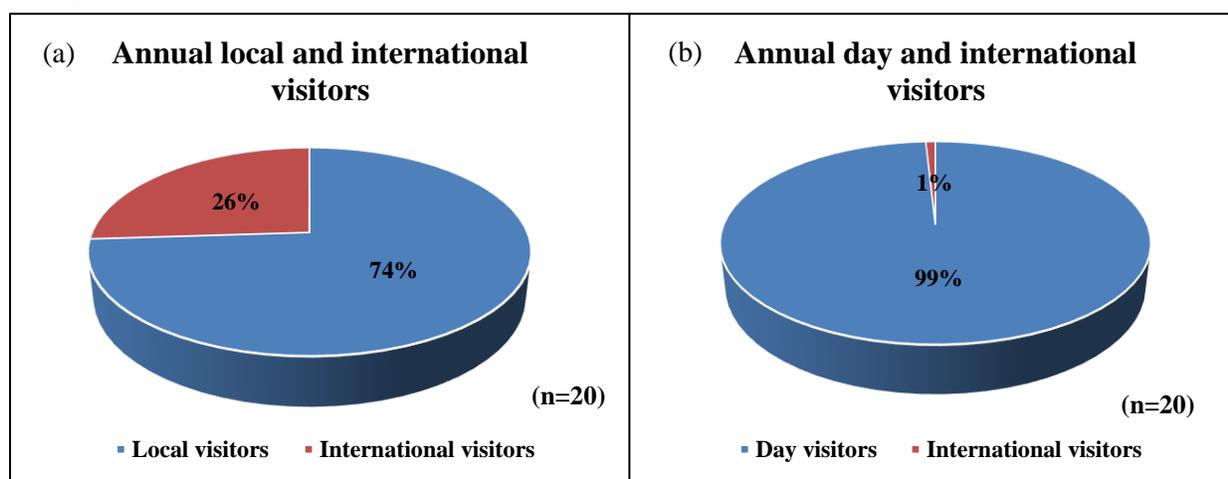
Fifty per cent or more of the participant farms each offer nine of the 17 listed services. Fifty-five per cent or fewer offer another five services each, 20% offer two services and only one offer a wine auction (Figure 4.36).



Source: Wine farm questionnaire survey

Figure 4.36 Paarl Valley Wine Route: Number of wine route members offering services

The Paarl Wine Routes visitors are mostly local (74%) and almost all visits are day trips (Figure 4.37a, b). Nearly 500 000 tourists visit the route every year. Most local visitors are from Cape Town areas, Paarl and Johannesburg. International visitors mainly from Germany, United Kingdom and United States of America. Local visitors spend between R50 and R1500 each per day, while foreign visitors can spend up to R2000.



Source: Wine farm questionnaire survey

Figure 4.37 Paarl Valley Wine Route: Visitor origins and stays

The route attracts many visitors every year, so that future development needs to provide more accommodation facilities, because overnight stays are very limited on the route. From the twenty participating wine route members, the highest development score was 56 (Backsberg Estate Cellars) and the lowest one (Freedom Hill Vineyards). The Paarl Wine Route has nine members achieving scores between 27 and 56. Furthermore, the route is well developed with wide ranging scores.

4.2.3.8 Robertson Wine Route: Valley of vines and roses

Location, historical and tourism contexts

Consequent to the growing number of farms in the Breede River region known as ‘over het roodezandt’, the need for a church and school was pressing so that after using Van Zyl’s farm, Overhet Roodezandt, for church gatherings, the Dutch Reformed Church bought the farm and Robertson was founded in 1853 and named after the Dutch Reformed Minister, Dr William Robertson (Robertson Wine Valley 2016). Robertson is now a prosperous town set in the shadows of the Langeberg Mountains in the Breede River Valley. Robertson is the main town in the Robertson Wine Valley with its numerous tourist attractions and the neighbouring towns of McGregor, Ashton, Bonnievale and Montagu (South African Tourism 2016). It is centrally located on the wine route and often used by tourists for stayovers, while exploring the area in a 160 km radius.

Robertson is on the famous R62 tourism road and it has experienced rapid growth in tourist numbers and tourism attraction. The area has 50 accommodation establishments, 50 wine estates, many restaurants, art galleries, shops, a 18-hole golf links and many other attractions. The town’s streets are wide and tree lined and the roads leading to and from Robertson are in good condition. The rural roads in the valley are lined with cannas, roses and trees. Tourist attractions include the Breede River Goose boat trip, Birds Paradise, horse riding, Goedereede Canoe Adventure, Kolgnas River Bot, Klipdrif House of Brandy, skydiving, Olive Grove farm, Pat Bush Nature Reserve, Rafting Route 62, Rosendal Wellness Retreat and Spa, The Donkey Sanctuary, Zevenfontein 4x4 Route, hiking trails and mountain biking (Robertson Wine Route 2016). The Robertson Wine Valley route, is a 90-minute drive from Cape Town partly on the Route 62. The Robertson Wine Route has 42 members spread between Bonnievale, McGregor and Robertson. Wine production in the region is concentrated along the Breede River Valley and in the foothills of the surrounding Langeberg and Riviersonderend ranges. The Robertson Wine Route is reputed for its affordable, quality wines and has made a mindful effort in the last decade to refocus its wine production and encourage wine tourism to the valley (Robertson Wine

Valley 2016). Notably, Robertson wine farms are planting more of the so-called ‘big six’ grape varieties (Riesling, Sauvignon blanc, Chardonnay, Pinot Noir, Merlot and Cabernet Sauvignon) as opposed to standard and distilling-wine varieties like Colombard and Chenin Blanc. The annual Wacky Wine festival also plays a major role in promoting the Robertson Wine Route, when more than 40 wine farms and tourist establishments gather to showcase the valley’s award-winning wines over a four-day period. Thousands of people attend the festival which not only offers wine tastings, but many wine-related activities, outdoor adventures, live music, fine dining and much entertainment for children (Wacky Wines 2016).

The Rosendal Winery and Wellness Retreat offers visitors guesthouse accommodation and a spa experience. The winemaker, Therese de Beer sources the best produce all over the Western Cape to craft premium wines. These wines are available via merchant service or ordering online, including the Rosendal Merlot, Reserve Black Spice and Barony Sophie. Visitors are also offered a tasting room experience in the comfort of their own homes, by delivering six wines to your door. The Rosendal Restaurant now has a new renovated kitchen, offering locally grown produce (Rosendal Winery 2016). Nordic Wines produce wine under the Wedgewood brand and was established in 2007. The Wedgewood farm and vineyards has undergone extensive upgrades and wines were initially sourced from cellars around the Western Cape. However, Wedgewood soon began to release their first wines and began to export and market other South African wine labels. Nordic Wines also sell selected wines from the Robertson Wine Valley to other restaurants, hotels and private customers (Nordic Wines 2016). Figure 4.38 shows a popular activity and winescape on the Robertson Wine Route.

Figure 4.38 shows the boat trip offered at the Viljoensdrift Wine Estate as well as the winescape of the Robertson Wine Route.



Source: Robertson Wine Route (2016)

Figure 4.38 Receptionscape and winescape on the Robertson Wine Route

Geographical factors for the production of quality wine grapes

The Breede River with its early morning mists is the lifeblood of this low-rainfall district with an annual average rainfall of 280-400 mm. The valley is characterised by extreme differences between day and night temperatures. Although summer temperatures can be high, cooling south-easterly winds channel moisture-laden air into the valley (Aspect 2015). The mean February temperature is 23°C. The Robertson district incorporates several wards which reflect a variety of environments related into the soil diversity in the valley. The winegrowing area features three main soil types, namely dark-coloured, light-textured, humid alluvial soils on the lower riverine terraces which induce vigorous growth; reddish-brown, heavy-textured soils, often calcareous, on older, higher terraces which, depending on the salt content and structure, also promote vigorous growth of vines; and relatively shallow soils on Bokkeveld shale which induce moderate vigour and yields if properly prepared. The Robertson region has the third-most vineyards planted in South Africa (Robertson Wine Valley 2016).

Eighty-eight per cent of the member wineries participated in the research. The Robertson Wine Route comprises 41% privately-owned wine farms, 28% are company owned and the remainder operate as a closed cooperation, co-operatives and trusts. All the wineries on the route are open to the public, they are open on weekdays and weekends and 13% open only by appointment. The distribution of the wine route members is mapped in Figure 4.39.

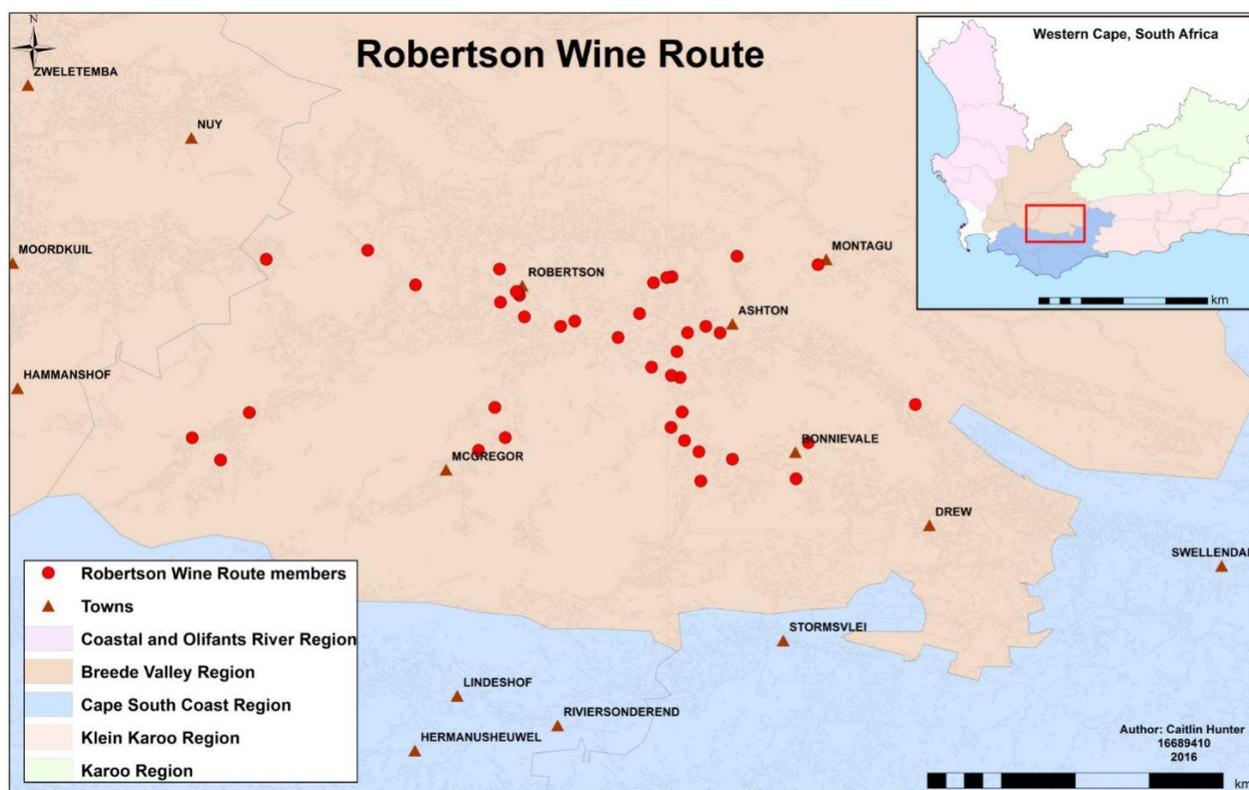
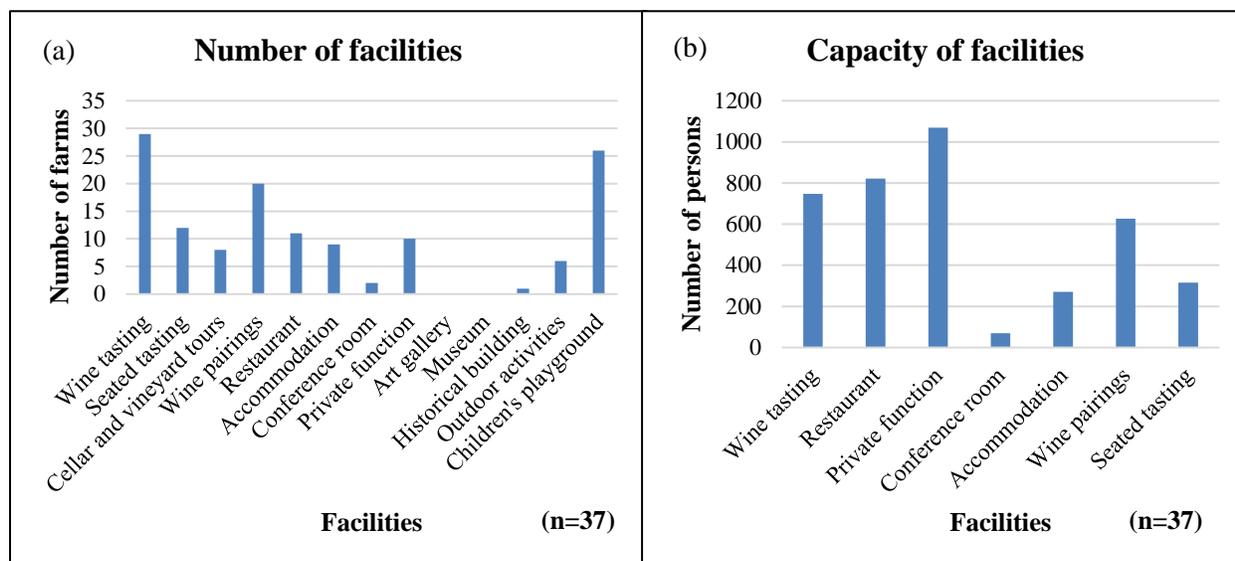


Figure 4.39 Distribution of the member wineries on the Robertson Wine Route in the Breede Valley Region

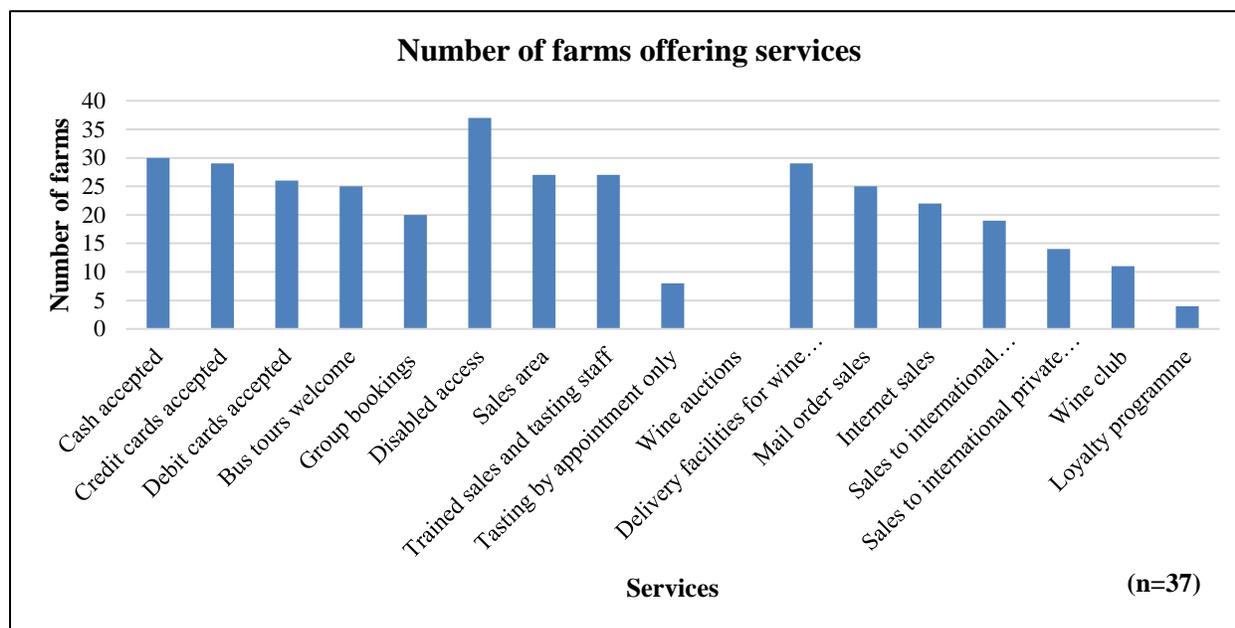
Figure 4.40a reveals that the majority of route members offer wine tasting (78%) and children's playgrounds (70%). Wine pairings (54%), restaurants (32%) and private function venues (27%) are less well represented. No art galleries and museums are present on the wine farms although Robertson does have a few. The restaurants and other eateries on the route include cafés, coffee shops and bistro's. Breakfast, lunch and dinner are served at the farm restaurants and some members offer platters. Accommodation includes self-catering chalets, manor houses, B&Bs and a hotel and spa. The capacity of the facilities shown in Figure 4.39b record that more than a 1000 people can be accommodated in private function venues (with a capacity range between 10 and 400 people), just over 800 people in restaurants (ranging between 26 and 300 people), and nearly 750 for wine tasting with a capacity range of between two and 150 people. More than 250 overnight visitors can be accommodated on this route, where a minimum of two people can be accommodated and a maximum of 170 people on one winery node.



Source: Wine farm questionnaire survey

Figure 4.40 Robertson Wine Route: Number of farms with facilities and capacity of facilities

Twelve of the 17 services are provided by 50% or more of the farms on the route. Wine clubs, tasting by appointment only and loyalty programmes are not well represented and none have wine auctions (Figure 4.41).



Source: Wine farm questionnaire survey

Figure 4.41 Robertson Wine Route: Number of services

Figures 4.42a and 4.42b show the proportions of local and international, and day and overnight visitors respectively. The majority of the visitors are local and visit the wine farms for the day only. The route is visited by 91 000 tourists every year. The local visitors mainly come from Robertson, Cape Town and Johannesburg, while most international visitors travel from Germany, the United Kingdom and the Netherlands. Local visitors spend R100 to R500 and the international visitors between R100 and R1000 per person per day.

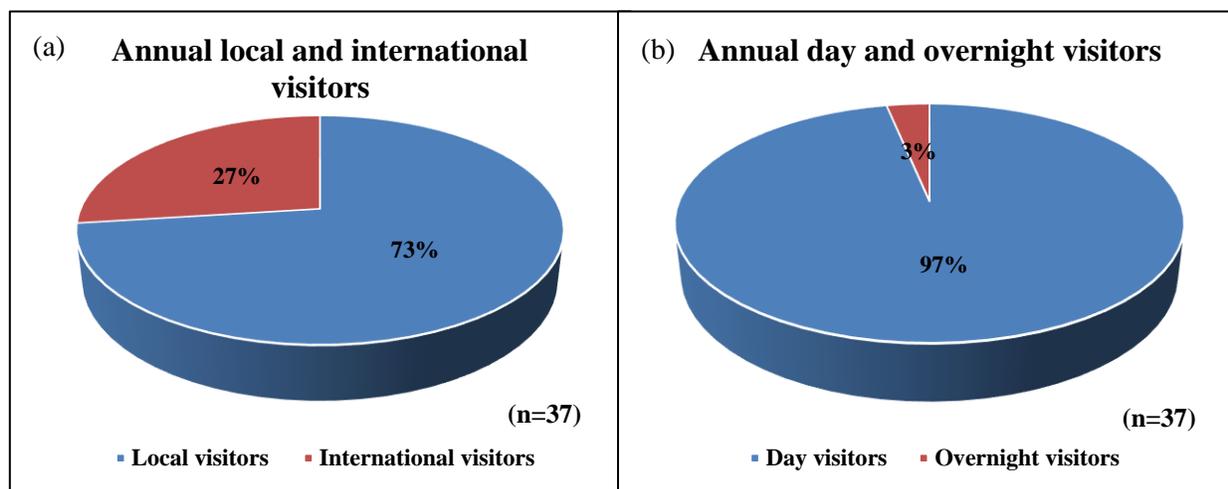


Figure 4.42 Robertson Wine Route: Visitor origins and stays

The highest score achieved by the participating wine route members from Robertson is 47 (Rosendal Winery and Country Estate). Fifteen members achieved a development score above 20, while 22 wine farms achieved scores below 20. The wine route receives 27% international visitors with few accommodation facilities. Future developments should focus on accommodation on the wine farms, thus attracting more overnight stays and spend on the farms.

4.2.3.9 Tulbagh Wine Route: The secluded valley

Location, historical and tourism contexts

Tulbagh, named after Dutch Cape Colony Governor Ryk Tulbagh, is located in the 'Land van Waveren' mountain basin (also known as the Tulbagh basin), in the winelands of the Western Cape, South Africa (Tulbagh Tourism 2016). The basin is fringed on three sides by mountains and drained by the Klein Berg River and its tributaries. Church Street boasts the largest number of Cape Dutch, Edwardian and Victorian provincial heritage sites in one street in South Africa, all restored after the

devastating earthquake of 1969. The town has five museums and it attracts people wishing to trace their ancestry recorded in the graveyard of De Oudekerk (museum church) which is in the original form (Tulbagh Tourism 2016).

Tulbagh is the fourth oldest town in South Africa, after Cape Town, Stellenbosch and Swellendam, dating back to the early 1700s. Tulbagh lies in a bowl enclosed by striking mountain ranges, with the Obiqua Mountains to the west, the Winterhoek Mountains in the north and the Witzenberg Mountains to the east (Tulbagh Wines 2016). There are various shops, restaurants to visit and outdoor attractions and include horse riding, hiking trails and waterfall hiking trails. The historic Tulbagh town houses, De Oude Kerk, Moniki Chocolates, Oakhurst Olives, Crystal Cave and Saronsberg Theatre complete the list (Tulbagh Tourism 2016). The basin experiences cool summer winds and a variety of terroir and microclimates create favourable conditions for different wine styles. There is sufficient water in the valley to irrigate olive groves and fruit orchards as complements to the vineyards.

Originally, the Montpellier estate was used exclusively for grazing cattle. The first vineyard was planted soon after the homestead was built (c. 1815), but the grapes were intended for private use (Montpellier 2016). In the late 1890s the first commercial vineyards were planted after Hendrik Theron had bought the farm in 1884. The first cultivars were mostly *Sémillon*, *Riesling*, French grape and *Cinsaut*. Acclaimed for producing outstanding white wines, as featured in their Michelangelo Gold *Gewürztraminer*, the Montpellier wine makers have diversified and expanded into name-making red varieties (Montpellier 2016). Recently Montpellier were awarded with Silver for the Montpellier Shiraz 2011 and 2013, the Montpellier Cabernet 2011, 2012 and 2013 as well as the Montpellier Spyseniensberg 2011 at the Michelangelo 2015. The highest accolades came from the MCC with Double Gold *Gran D'Or* for both their MCC Brut 2010 and MCC Rose 2011 (Montpellier 2016; Platter 2016).

The historic Twee Jonge Gezellen farm in Tulbagh is the home of Krone, a collection of notable, vintage-only South African *Méthode Cap Classique*s made from grapes grown and night-harvested in the distinctive terroir (Twee Jonge Gezellen 2016). Twee Jonge Gezellen has a 300-year history reflected in the farm's architecture. Cold fermentation was invented on the farm which introduced night harvesting of grapes to retain the coolness in the fruit. It is the site of Africa's first underground cellar (Twee Jonge Gezellen 2016). Figure 4.43 shows the Tulbagh town and surrounding landscapes.



Source: Cape Winelands (2016)

Figure 4.43 Tulbagh town and landscapes

The landscapes and town of Tulbagh is shown in Figure 4.43 along with the chapel on the Montpellier wine farm.

Geographical factors for the production of quality wine grapes

The soils in the valley are variable, from sandy soils on the valley floor to stony soils on the old, higher terraces and mountain slopes (Aspect 2015). At higher altitudes, soils from the Malmesbury Supergroup schists and phyllites predominate, as well as more recent deep, yellow boulder-bed deposits offering medium growing potential (Platter 2016). Average rainfall is 551 mm per annum but rainfall varies due to different microclimates with higher rainfall against the mountains than in the valley. Summers are warm with a mean February temperature of 24°C, although the mountainous terrain creates many mesoclimates which can be used to great advantage. A unique phenomenon is the valley's 'cold trap' caused by the encapsulating mountains, shaped like a horseshoe, with Tulbagh situated at the northern head of the bowl (Aspect 2015). Within this bowl, once a prehistoric lake, the cold air of the night lies undisturbed and with no air movement from the sides the cold bubble is trapped under the warming air above. The most-planted white-wine variety is Chenin Blanc, followed by

Colombard and Chardonnay. Red wine varieties planted are predominantly Shiraz, Cabernet Sauvignon, Pinotage and Merlot. This inland district is noted for the quality of its Shiraz consistently awarded the highest accolades and its excellent Méthode Cap Classiques. Tulbagh has also gained a reputation for its top-quality Pinotage and red blends (South African Tourism 2016). Tulbagh has eleven members on the route, with 64% participation (7 wineries) in the research. Forty-three per cent of the wine farms on the route are privately owned, the rest company owned. The majority (90%) of the farms are open to the public and are open weekdays and on weekends. Ten per cent of the route members allow visitors to taste wine by appointment only. See Figure 4.44 for the concentration of wineries on the Tulbagh Wine Route.

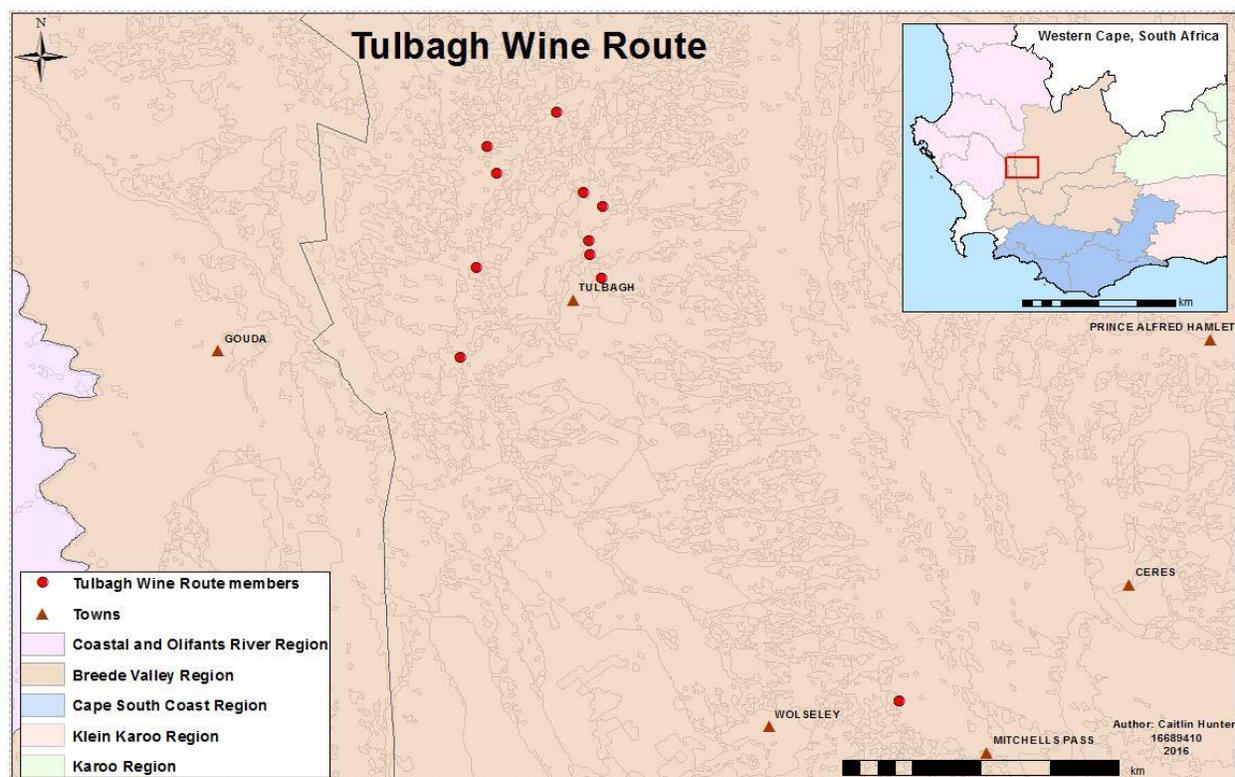
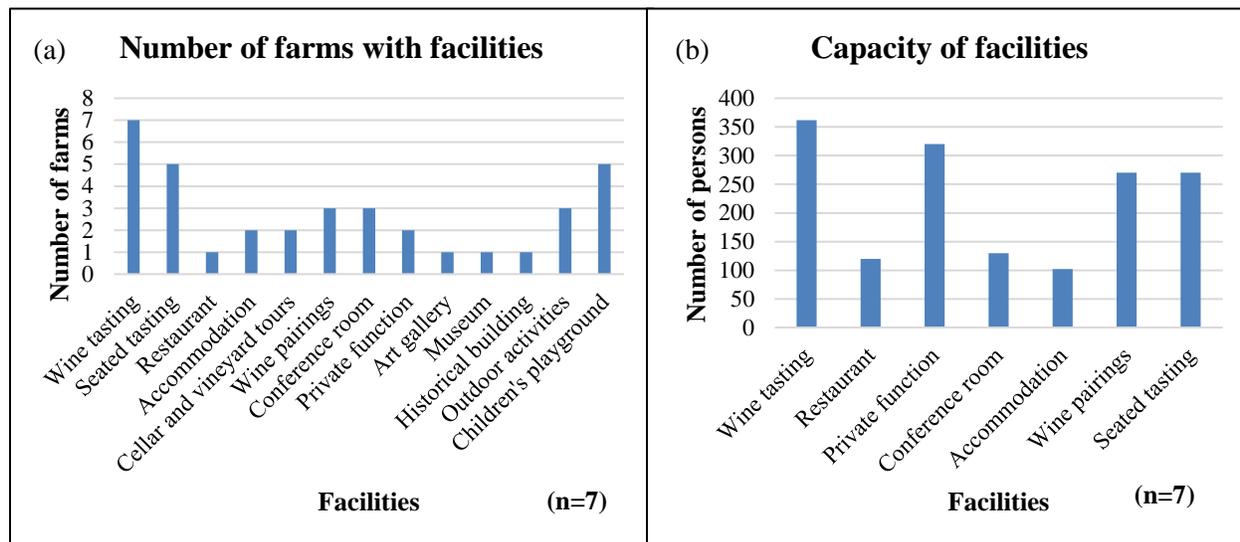


Figure 4.44 Distribution of member wineries on the Tulbagh Wine Route in the Breede Valley Region

Apart from wine tasting facilities and children's playgrounds there are little development regarding tourist related superstructure. Wine pairings, conference rooms and outdoor activities were reported by 43% of the participants. Figure 4.45a confirms that the route's focus is on wine tasting with 88% of the farms providing this service where over 362 people can be accommodated (with a capacity range between 2 and 150 people). More than 300 people can be catered for private functions (ranging between 120 and 200 people), 270 visitors for wine pairings with a capacity range between 20 and 150, 120 people in restaurants and with about 100 people in the accommodation facilities (Figure 4.45b). The

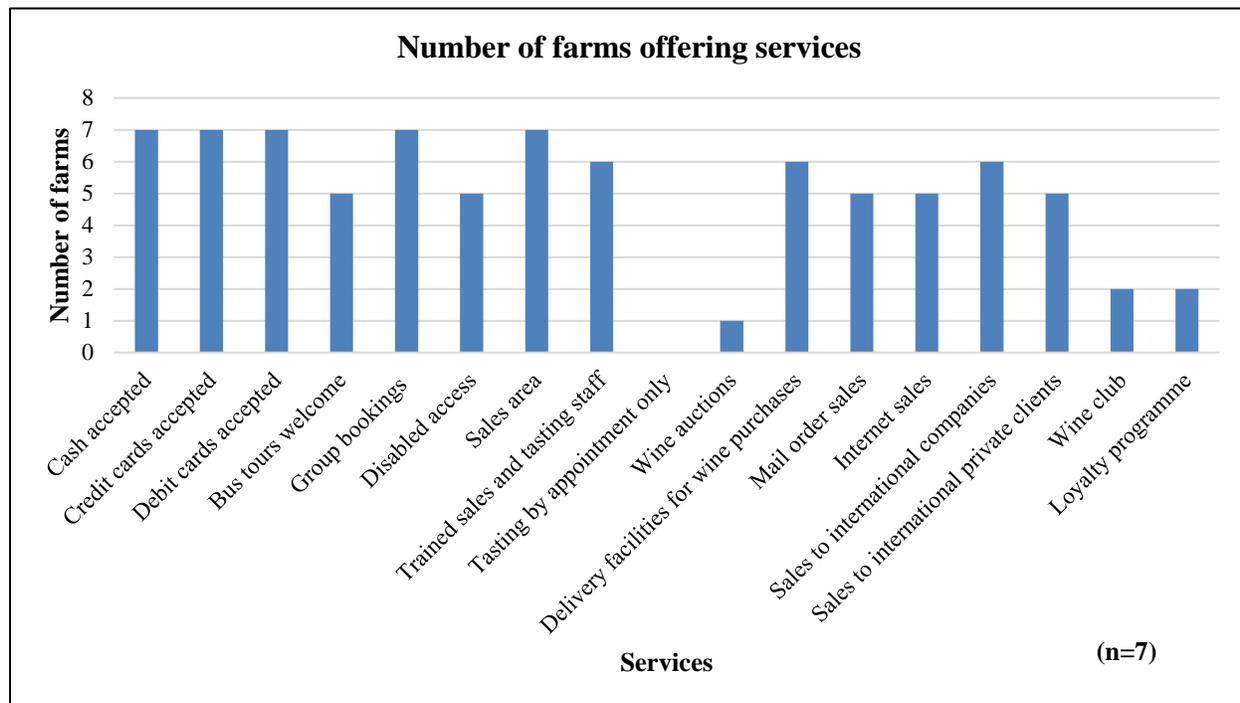
restaurants serve breakfast, lunch and dinner and provide platters. The accommodation facilities comprise a self-catering chalet and a guesthouse.



Source: Wine farm questionnaire survey

Figure 4.45 Tulbagh Wine Route: Number of farms with facilities and capacity of facilities

Figure 4.46 displays the services available on the Tulbagh Wine Route. All the participating wine farms offer the questionnaire-listed service, but one (tasting by appointment only).

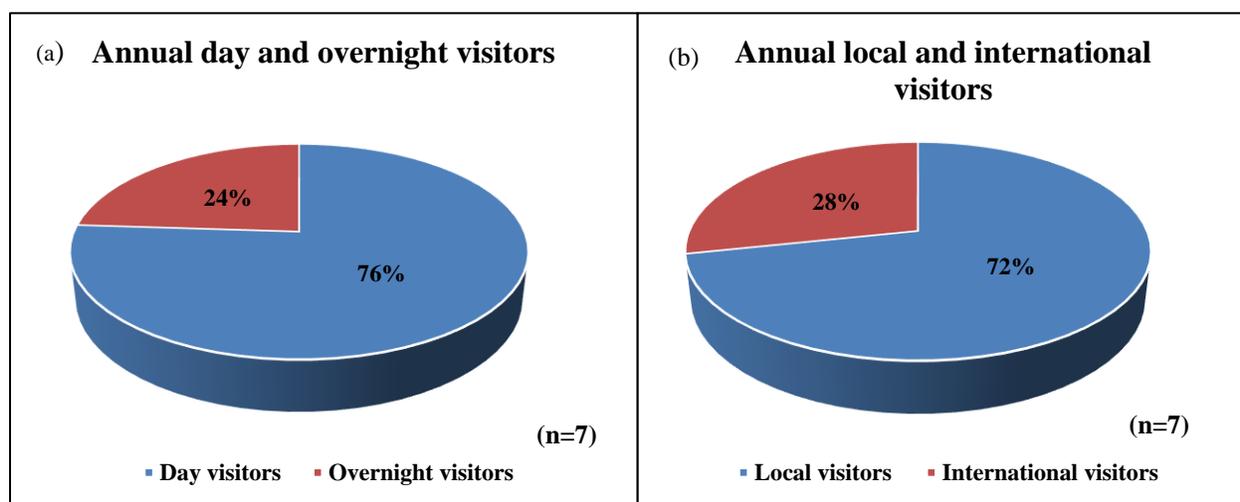


Source: Wine farm questionnaire survey

Figure 4.46 Tulbagh Wine Route: Number of wine route members offering services

Seventy-one per cent of the farms offer cash, credit and debit cards, do group bookings and has a specific sales area. Seventy-one per cent welcome bus tour groups, has disabled access, do mail order and Internet sales. Twenty-nine per cent offer sales to international companies and has trained tasting and sales staff, with two farms offering wine clubs and loyalty programmes and one farm offering wine auctions.

According to Figure 4.47a and Figure 4.47b the Tulbagh Wine Route relies on day visitors (76%) and local visitors (72%) from Stellenbosch, Cape Town and Johannesburg, who spend on average R200 to R2000 per person per day. The international visitors travel from Germany, the United Kingdom and China and spend on average R100 to R1000 per person per day.



Source: Wine farm questionnaire survey

Figure 4.47 Tulbagh Wine Route: Visitor origins and stays

The development scores of the Tulbagh Wine Route participating members were all relatively high. Montpellier attained a score of 59, followed by Waverly Hills (49), Saronsberg (31), Rijks Cellar (23), Drostdy (21), Tulbagh Winery (15) and Twee Jonge Gezellen (14). The development scores by these members indicate that these members are all focused on tourism activities on their farms, allowing the visitors to experience their wine tourism product. The Bredekloof Wine Route is explored next.

4.2.3.10 Wellington Wine Route: Nursery of the vine

Location, historical and tourism contexts

Wellington is a 45-minute drive from Cape Town, and the valley in which the town lies was initially called Val du Charron (Valley of the Wagonmakers) and was the last outpost for adventurers, pioneers and travellers embarking on the difficult journey into the hinterland with their ox-drawn wagons (Wellington 2016). Following earlier attempts to name Wellington, Sir George Napier eventually suggested the town be named after ‘England’s greatest soldier’ in 1840 after the Duke of Wellington had defeated Napoleon at Waterloo. The Bain’s Kloof Pass, built by the famous Scotsman Andrew Geddes Bain in 1840, was initially the only gateway to the north until the Du Toitskloof Pass was opened in 1949 (South African Tourism 2016). The people of the warm-hearted valley offer a variety of activities, including scenic wine walks, game drives, mountain biking trails, visits to the Bontebok Ridge Reserve, the James Sedgewick Distillery and the Wellington Museum. A concert or show can be attended at the Breytenbach Centre and many heritage places and buildings (e.g. Anglo-Boer War Blockhouse, Clairvaux, Murray Jubilee Hall & Samuel House and Lady Loch Steel Bridge) are on offer along with a meal at The Stone Kitchen. Wellington is nestled at the foot of the Groenberg, the town lies in a charming valley on the banks of the Krom River with the majestic Hawequa Mountains as silent sentinels on the eastern border (Wellington 2016). At the foot of the mountains are the beautiful manicured vineyards and finely restored Cape Dutch homesteads, some declared national monuments. Apart from award-winning wines, the region also boasts craft beer, brandy, whisky and gin producers and was Proclaimed ‘Top Wine Area’ at the exclusive 2010 South African Terroir Awards (Wellington Tourism 2016).

The Diemersfontein Wine and Country Estate offers wine tasting, modern cuisine for lunch and dinner, guest accommodation and a private function and wedding venue. There are also numerous country estate properties and a reputable small primary school. Visitors are able to taste wines from three ranges, namely Diemersfontein Original, Carpe Diem and the Thokozani range (Diemersfontein 2016). Klein Optenhorst is situated in the Bovlei Valley near Wellington, with a nineteenth century farmhouse. The farm also boasts with a terraced garden which is one of the largest collections of Salvias in South Africa. The nursery is open to visitors by appointment or on open days. The grapes grown on the farm is being vinified to sparkling wine to produce MCC. Wine varieties also include Pinot Noir and Rosé. The farm also offer a wedding venue and wine tastings (Wined 2016). Figure 4.48 shows the Wellington landscape.



Source: South African Tourism (2016)

Figure 4.48 Land-and winescape on the Wellington Wine Route

The scenic vineyards on the Wellington Wine Route is shown in Figure 4.47, with beautiful views from the mountains.

Geographical factors for the production of quality wine grapes

Some vineyards stretch over alluvial terraces toward the Swartland's rolling hills and wheat fields, while others are found in the foothills of the towering Hawequa mountain and Groenberg where folds and valleys create unique mesoclimates (Aspect 2015). Soils are predominantly derived from granite and Table Mountain sandstone, with Clovelly and Hutton types prevalent. Alluvial soils are found closer to the Berg River as well as soils derived from Malmesbury shale on the rolling hill landscapes. Wellington's grapevine nurseries supply over 85% of the South African wine industry with cuttings and the route's wine producers range from boutique wineries to historical estates (Platter 2016). In winter, snow sometimes covers the mountain tops and night temperatures are generally lower than at the coast some 60 km away. The average annual rainfall is 741 mm and the mean February temperature is 23.2°C (Aspect 2015). Chenin Blanc dominates white-wine grape plantings and red-wine varieties are Cabernet Sauvignon, Shiraz and Pinotage. (South African Tourism 2016).

The Wellington wine route is small and compact and the cellars are within easy driving distance of each other (Figure 4.49). The Wellington Wine Route has 21 producing members with 62% of the members participating in the research. Sixty per cent of the participant farms are privately owned and

40% are company owned. The Wellington Wine Route farms are open to the public and some operate by appointment only (24%).

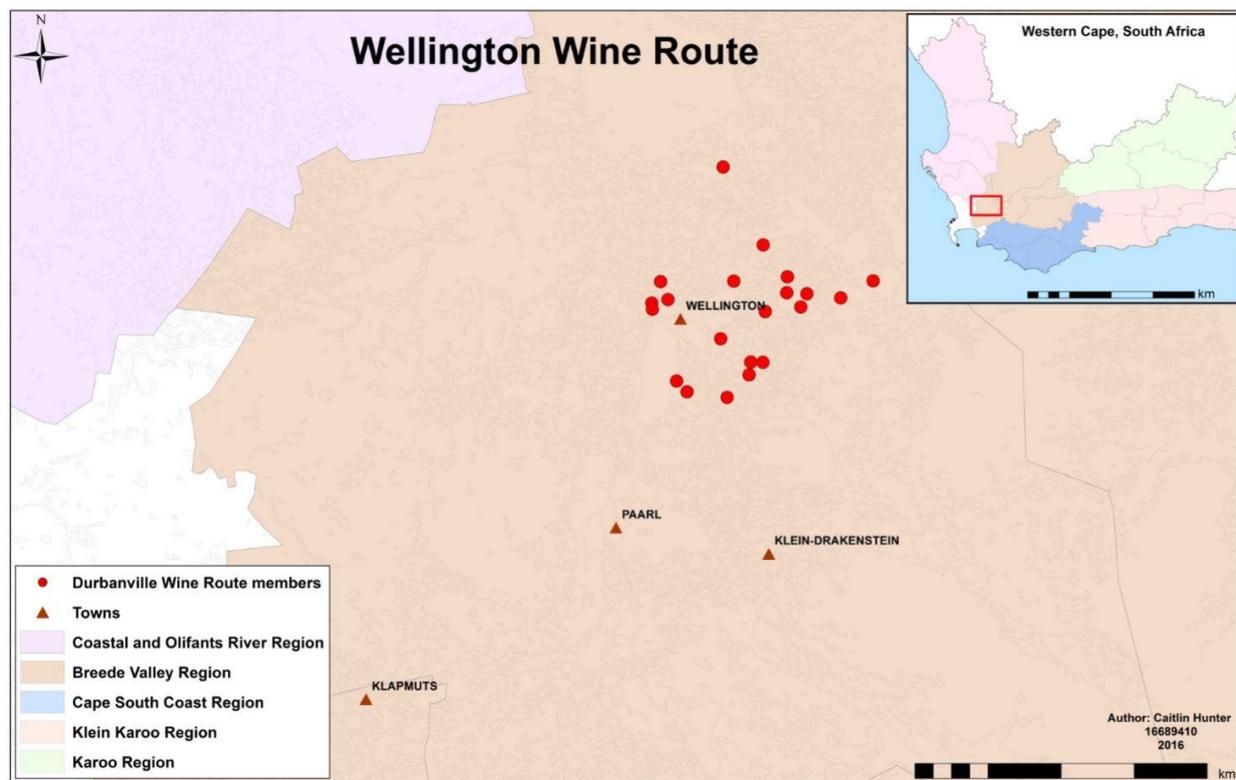
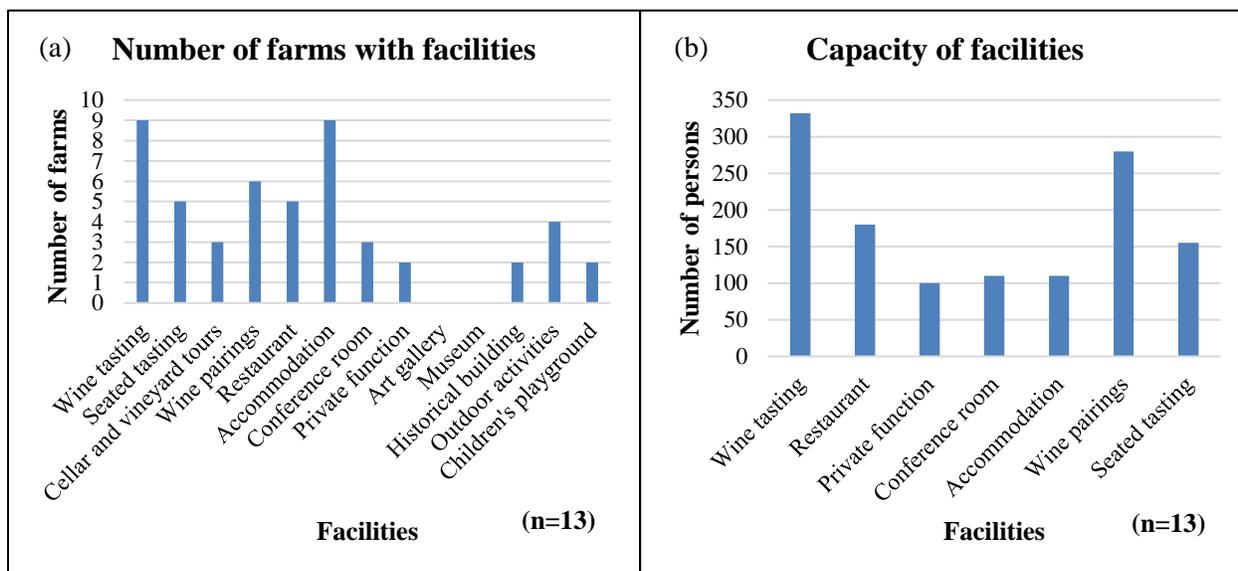


Figure 4.49 Distribution of Wellington Wine Route members in the Breede Valley Region

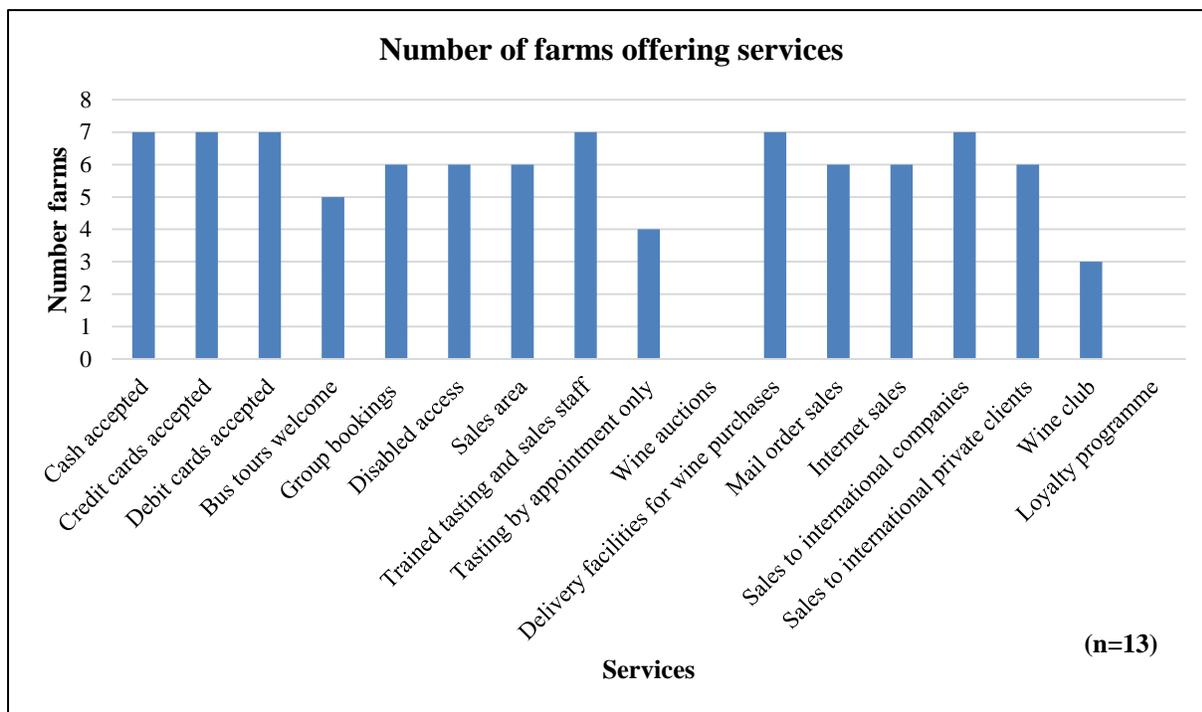
The facilities offered most by Wellington Wine Route members are wine tasting facilities (69%), accommodation (69%) and wine pairings (46%) (Figure 4.50a). Less prevalent are seated tastings (38%), restaurants (38%), outdoor activities (31%), cellar and vineyards tours (23%) and conference rooms (23%). Route members can cater for 332 visitors at wine tastings (with a capacity range between 10 and 80), 180 in restaurants (with a range between 50 and 70 people), more than 100 in accommodation (with a range between eight and 50) and 280 at wine pairings with a capacity range between 20 and 80 people (Figure 4.50b). Accommodation is Bed & Breakfast, self-catering and in a manor house accommodation, while most of the restaurants offer breakfast, lunch and dinner.



Source: Wine farm questionnaire survey

Figure 4.50 Wellington Wine Route: Number of farms with facilities and capacity of facilities

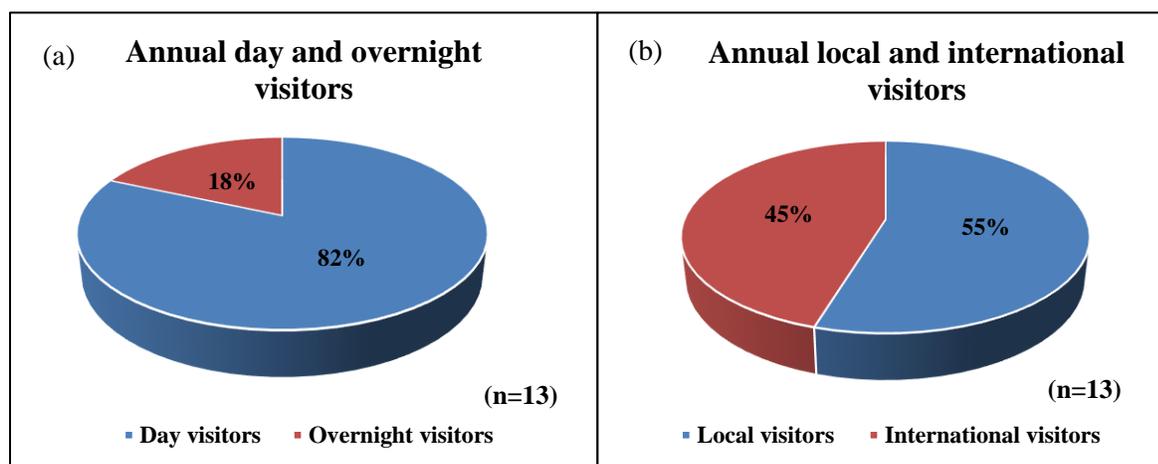
One half or fewer of the participating Wellington Wine Route members offer the questionnaire-listed services and none offer wine auctions or loyalty programmes (Figure 4.51).



Source: Wine farm questionnaire survey

Figure 4.51 Wellington Wine Route: Number of wine route members offering services

According to Figure 4.55a most (82%) of the visitors are day-trippers while there is an almost equal split between local and international visitors to the Wellington Wine Route (Figure 4.52b).



Source: Wine farm questionnaire survey

Figure 4.52 Wellington Wine Route: Visitor origins and stays

Local visitors who mainly come from Cape Town, Johannesburg and Durban spend between R150 and R2000 per persons per day. International visitors spend between R200 and R1200 per persons per day and they come from Germany, the United Kingdom and the Netherlands. The development scores from the participating members on the Wellington Wine Route achieved a high score of 53 (Diemersfontein Wine and Country Estate). Three of the participating members achieved a score of 41, while five farms achieved a score between five and eight. The lowest score achieved is by Klein Optenhorst (1). More overnight facilities are an important future development as 45% of the visitors to this route are international visitors.

4.2.3.11 Worcester Wine and Olive Route: The olive, brandy and wine route

Location, historical and tourism contexts

Worcester was declared an official town by the local Magistrate's Court (the Drostdy) in 1820, although development was limited until the railway line from Cape Town reached the town in 1876 (South African Tourism 2016). The town had a strong German element following an influx of railway workers in the 1860s. The town's Kleinplasië Living Open Air Museum provides a glimpse of this past and offers much information for visitors. It is the hometown of musician and playwright David Kramer

and artist Hugo Naude. This town is on Route 62, the longest wine route in the world (South Africa Tourism 2016). Figure 4.53 shows the location of the members of the Worcester Wine & Olive Route.

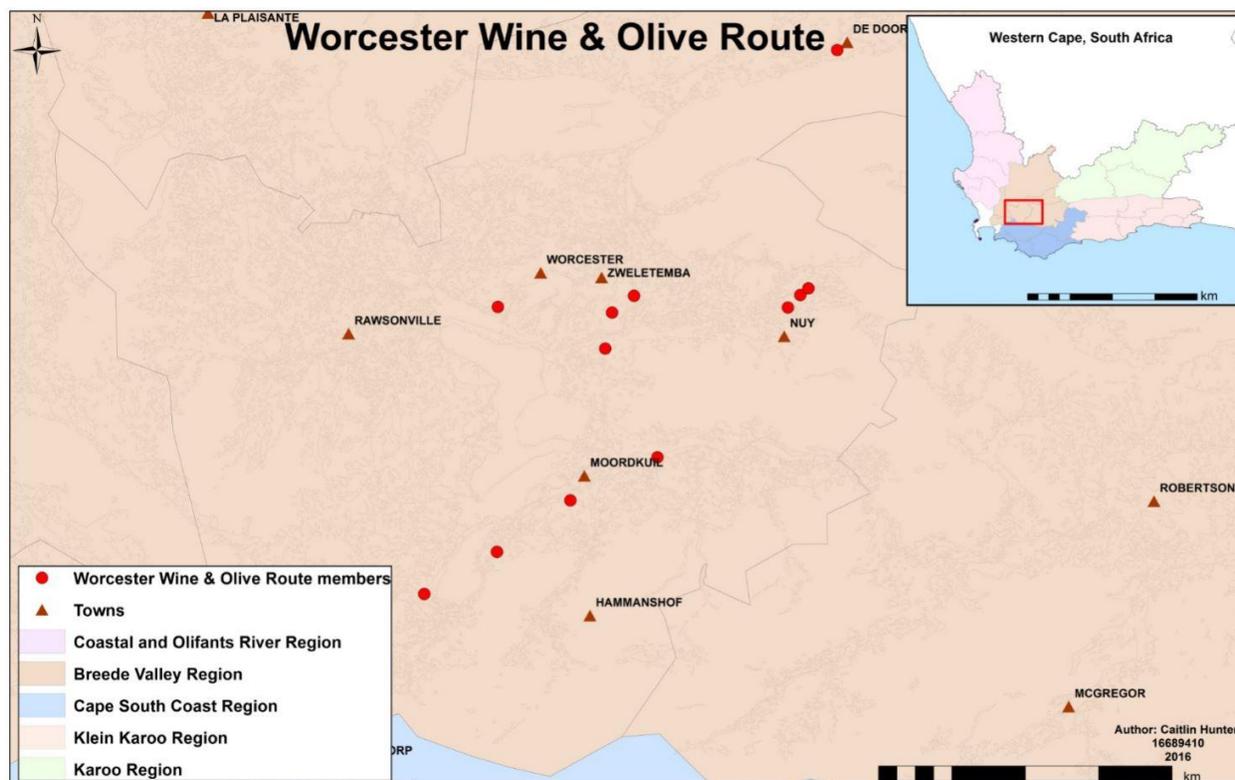
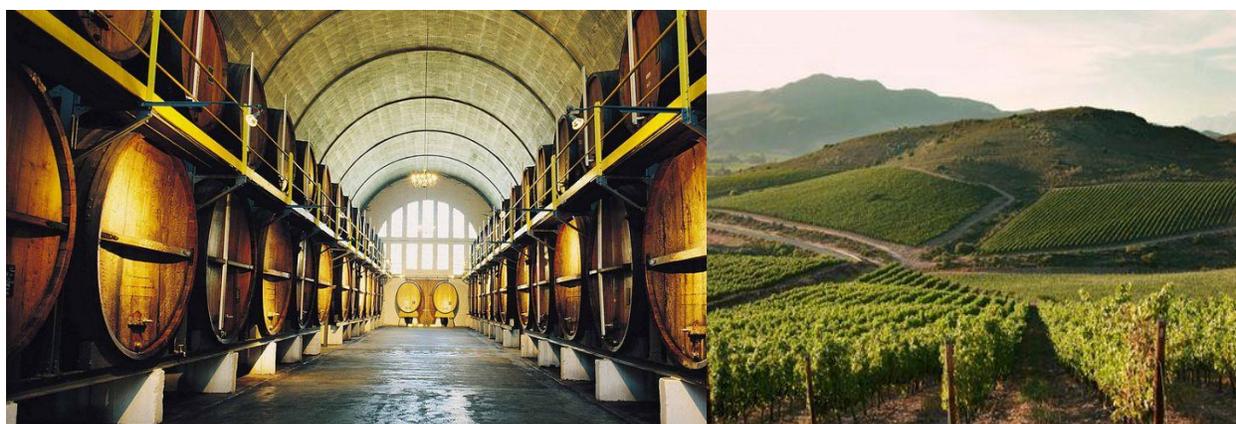


Figure 4.53 Distribution of member wineries on the Worcester Wine & Olive Route in the Breede Valley Region

The Worcester Wine & Olive Route represents a 250-year wine-making tradition and the route is situated in the Breede River Valley (Worcester Wine Route 2016). Secured by the Hex River Mountains and the Matroosberg, the Worcester wine district includes the Aan-de-Doorns, Hex River Valley, Nuy and Scherpenheuvel wards. Together with the Breedekloof district, the Worcester Wine & Olive Route is the largest grape-producing region in the Western Cape measured by grape-growing area and volume, namely of the 20% of the country's vineyards by area (WOSA 2016). Worcester offers attractions in and around the town: Golden Valley Casino; the ATKV Goudini Spa; the art, culture and history of the town at various art galleries and museums (e.g. Hugo Naude Art Museum & Jean Welz Art Gallery, The Barn Art Gallery, Worcester Museum: Kleinplasië); birdwatching (e.g. Karoo Desert National Botanical Garden, De Wilge and Fairy Glen Game Reserve); hiking trails, mountain biking, 4x4 routes, vineyards tractor-wagon trails (Nuy Valley Guest Farm and Leipzig

Country House); and boat cruises (Viljoensdrift) (Worcester Wine Route 2016). The Worcester Wine & Olive Route has 12 wine-producing members.

The farm Leipzig derives its name from a cultural city in Germany where the first Rabie's came from in 1779. Winemaking, fresco art and historical buildings make Leipzig an interesting destination. The farm has a luxury guest house, a conference or wedding venue and a wine-tasting area (Worcester Wine Route 2016). Leipzig Winery gives visitors personalised tastings and cellar tours as well as lunches prepared with fresh ingredients. The De Wet Cellar was established in April 1946 and is the oldest cellar in the Worcester area, producing about 18 000 tons of grapes every year. This cellar allows visitors to taste their wines in their tasting lounge with an outdoor patio for a relaxed environment. De Wet Cellar's wines can be order online and include varieties of red wine, semi-sweet wine, sweet wine, white wine, MCC, boxed wines and also grape juice (De Wet Cellar 2016). Figure 4.54 illustrates a Worcester landscape and a local wine cellar



Source: Worcester Wine Route (2016)

Figure 4.54 Worcester Wine & Olive Route cellar and landscape

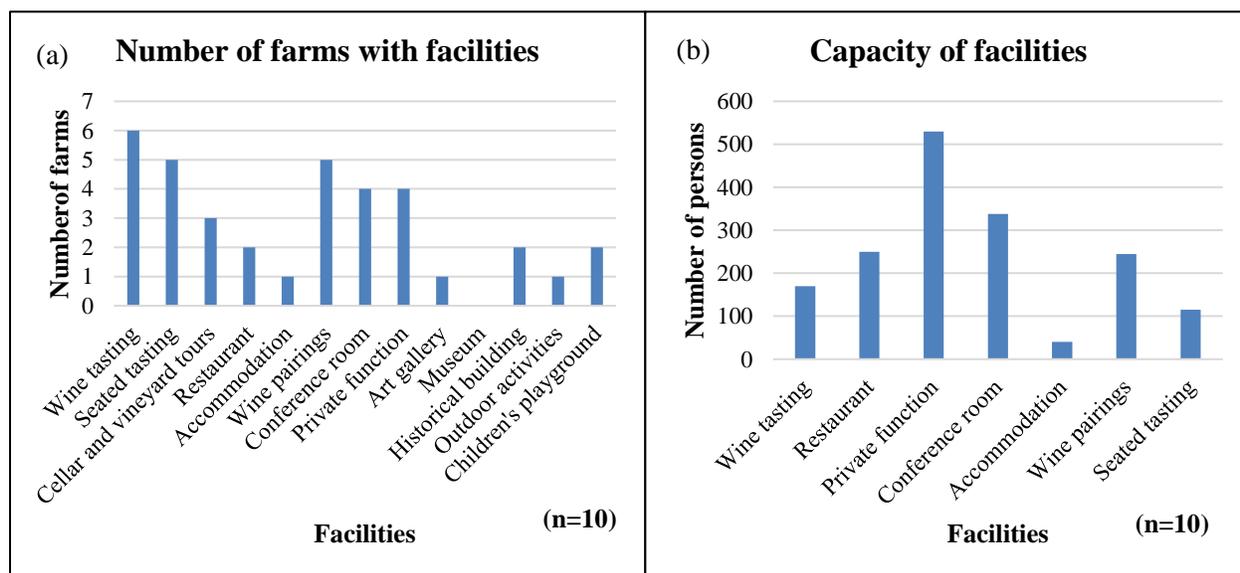
The above figure (Figure 4.54) show the inside of a local wine cellar along with a beautiful landscape on the wine route.

Geographical factors for the production of quality wine grapes

Between Worcester and Robertson in the Breede River Valley, the climate is Mediterranean and the rainfall is low. Winter nights are cold and there is often winter snow on the mountain peaks. The Worcester fault, a major local geological feature, defines the geology of the area (Aspect 2015). Soils are predominantly alluvium, loam and sandy loam. In the Worcester region more vineyards are currently being planted than uprooted. The most widely planted white-wine variety is Chenin Blanc

and Shiraz is the dominant red-wine variety, followed by Cabernet Sauvignon and Pinotage (Platter 2016).

Eighty-three per cent (ten) of the 12 members participated in the study. Sixty per cent of the route members are company owned, the rest are privately owned. All the participating wine farms are open to the public during the week and on weekends. Most cellar tours are by appointment only. Sixty per cent of the wine farms offer wine tasting, half offer seated tastings and wine pairings, and 40% have conference room facilities and private function venues (Figure 4.55a). Only 20% have restaurant, historical buildings and children's playgrounds. The route is poorly provided with outdoor activities, art galleries and accommodation. The total capacity of the private function exceeds 500 people (with a capacity range between 100 and 200 people), 250 people can be accommodated in the two restaurants (with a minimum of 100 and a maximum capacity of 150), 170 in wine tasting rooms (with a capacity range between ten and 45 people) and 338 in conference rooms (ranging from eight to 200 people) (Figure 4.55b). The restaurants are bistro or deli types serving breakfast, lunch and dinner. The accommodation facilities comprise self-catering and manor house facilities.

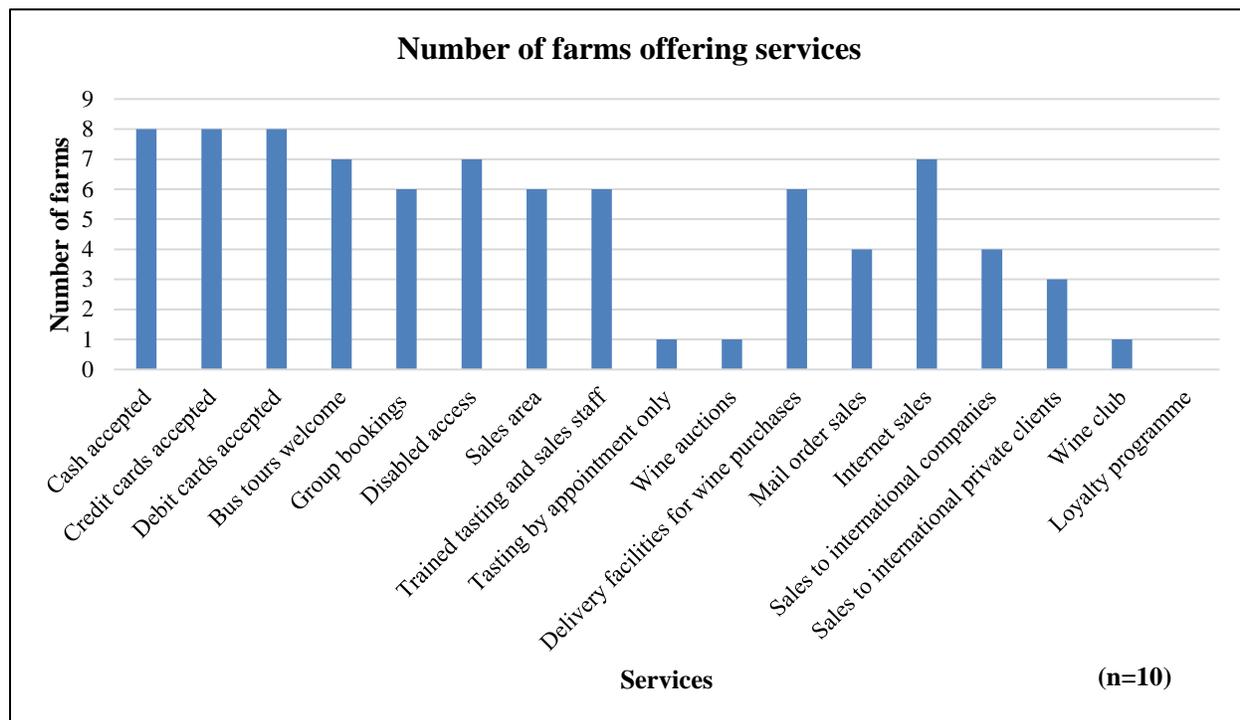


Source: Wine farm questionnaire survey

Figure 4.55 Worcester Wine & Olive Route: Number of farms with facilities and capacity of facilities

Figure 4.56 shows the services available from members on the route. All the questionnaire-listed services but one (loyalty programme) are provided by between one and eight per service. Important services like Internet sales, delivery facilities, trained tasting and sales staff, specific sales areas,

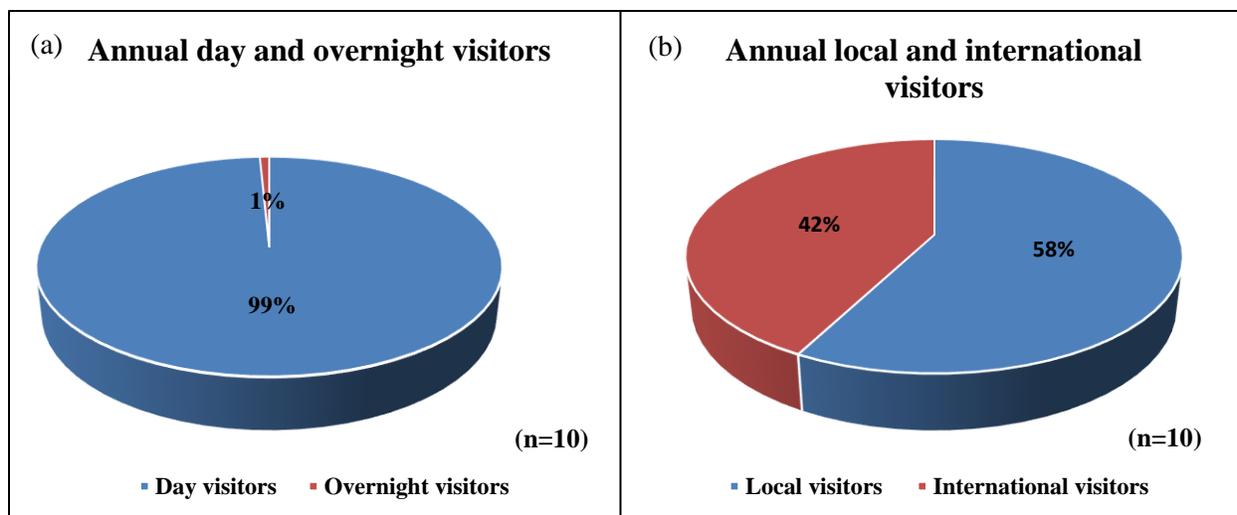
disabled access, group bookings and facilities for bus tour groups are provided by 60% to 70% of the farms.



Source: Wine farm questionnaire survey

Figure 4.56 Worcester Wine & Olive Route: Number of wine route members offering services

The vast majority of visitors are day visitors (Figure 4.57a) while the split between local and international visitors favours the former (Figure 4.57b). Despite the lack of tourist superstructure like accommodation and restaurants, the route does attract international visitors. Most local visitors travel from Cape Town, Worcester and Robertson, while international visitors come from the United Kingdom, Germany and France. The local and international visitors similarly spend on average between R100 and R500 per day on a visit to the wine route.



Source: Wine farm questionnaire survey

Figure 4.57 Worcester Wine & Olive Route: Visitor origins and stays

In terms of the development scores from the assessment framework, the highest score is 59 by Leipzig. Other scores were between one and 39. Leipzig is by far the most developed node on the route. However, Worcester has a few large cellars that do not cater for visitors and is an indication of the lower scores attained by the participant route members. This route is in the largest grape-producing region. Even though the route lacks certain tourist superstructures and activities (restaurants, accommodation, art galleries, museums, outdoor activities), the spotlight is on the wine and wine-related activities to attract local and international visitors. Route growth lies in the development of more tourist superstructure to attract overnight visitors. Attention turns next to the Tulbagh Wine Route. The next section discusses the wine routes in the Cape South Coast Region.

4.2.3.12 Botrivier Wine Route: The route in abundance

Location, historical and tourism contexts

Bot River's (Botrivier) history tells that the original Khoikhoi name for the area was 'Gouga' meaning in abundance or fertile from which the term 'bot' (butter) possibly evolved (Bot River 2016). The Khoikhois wealth lay in their cattle, which were sturdy, fat and tame, so that the rolling hill country of the plains and the fertile well-natured valleys were covered with 'Renosterbos' (nutritious herbs, low sprawling shrubs) and grassland made ideal for grazing cattle. The Khoikhoi were also some of the earliest traders in animal fat and, possibly, butter. They were primarily wandering rural farmers who inhabited the plains and rolling hill country (Bot River 2016). The merchants travelled from Cape

Town to trade a variety of wares for full casks of butter named the river *Botter* as early as 1672. The river now represents some fine wines (WOSA 2016).

The Botrivier Hotel, built in the 1890s, is one of the oldest buildings in the town. The village also has one of the oldest wine cellars in the region, its history going back to the 1700s with the establishment of Compagnes Drift (Bot River Wines 2016). This farm was bought by Jayne and Raoul Beaumont in 1974 and revitalised as the Beaumont Wine Estate with the release of their first vintage of Beaumont Pinotage. The wine was well received and the estate is one of the Cape's most well respected. The Botrivier area is one of a few areas in the world that has a wine route in a protected biodiversity zone. A notable event in the town's history was the arrival of the railway line from Cape Town to Caledon in Bot River in 1902. The railway was an engineering feat as it wound its way up Sir Lowry's Pass, over the Hottentots-Hollandberge and down the Houwhoek Pass. The railway sparked an increase in commerce for the residents of Botrivier who could trade with Cape Town faster than before (Bot River Wine Route 2016). South Africans were introduced to Botrivier through the television series *Nommer Asseblief* (Number please) that premiered in 1979. The village was the setting for this popular show and for many years tourists would visit and insist on seeing the telephone exchange that was central to the story, as well as meeting the actors who portrayed the well-loved characters in this local soap opera (WOSA 2016).

Every year (in October) the Botrivier community gathers in the centre of town to watch which winery's team can roll their barrels fastest. This community project is arranged by the Bot River Winery Association and is a day of excitement for the local farm workers, their families and friends. Races are relay style with time trials, leaving the two best teams to compete for the grand prize in the final race. The winning team wins a new wine barrel which is bought by the winning farm and the "rollers" are given the cash (Bot River Wines 2016). On the same day the Bot River Van der Stel Pass Challenge takes place. The event is organised by the Bot River Education Foundation and it starts and ends at the historic Botrivier station. The route winds through the beautiful country side of the Van der Stel Pass and over farmlands not normally open to the public (Bot River Wine Route 2016). The Wildekrans Wine Estate covers an area of 1000 hectares and was originally a mixed farming operation. Even though the estate still produces export fruit, the main focus has become wine. The estate produces Pinot noir, Chardonnay and hoping to produce Cap Classique in the future. The Wildekrans Pinotage Barrel Selection 2007, has been one of their top wines when it was awarded a silver medal at the Decanter World Wine Awards. The estate also allows visitors the opportunity to taste their wine daily, offer farm

cottages, swimming, hiking trails, bird watching, mountain biking and also has a wedding venue and conference venue (Wildeckrans 2016). The Eerste Hoop wine farm covers about 25 hectares ‘off-the-beaten’ track near Botrivier. Even though this farm allows visitors by appointment only, it should not be overlooked. The farm’s philosophy believes in keeping things simple, well cared for and clean. The style of wines includes Cabernet sauvignon, Pinot noir, Shiraz. Two cultivar wines, Shiraz and Chardonnay are labelled under the Witklip label (Bot River Wines 2016).

The Botrivier area offers various other activities for visitors to enjoy. Botrivier is famous for its farm stalls that sell fresh produce and farm-style foods. The town is also known for horse riding at the Klein Paradys Equestrian Centre this is considered to be a good way for families to explore the town (Bot River Wines 2016). Socialising with the locals is encouraged and the Botrivier Hotel is the place to experience some of the history and hospitality of the town and the pub area is filled with memorabilia of Botrivier’s past (Bot River Wine Route 2016). The Bot River station is a spot for live music and the most recent addition to Botrivier’s pub life, The Shuntin’ Shed, serves a range of dishes featuring locally-sourced ingredients and wine. Botrivier is known as a wildlife haven (Bot River Wines 2016), mainly as the result of the conservation of the area’s delicate biosphere. The Cornellskop Animal Farm is also a tourist attraction. The Houwhoek Pass provides kilometres of hills and changing vegetation, with scenic views all around. This makes the pass a popular place for mountain biking, running and hiking. A more relaxing pursuit is trout fly fishing in Botrivier (South African Tourism 2016). The bird-watching opportunities are vast for enthusiasts looking to expand their South African portfolios. Other adrenaline-filled activities include abseiling, rock climbing, guided tours on quad bikes and 4x4 adventures. Botrivier has many local arts and crafts available from quaint, brightly-painted shops. De Geheime Kelder Gallery showcases local talent in curated exhibitions throughout the year.

Historically, Botrivier is renowned for the woodwork of its carpenters who make fire pieces from beautifully shaped benches to abstract tables, each piece of wood expertly carved and stained (Bot River Wines 2016). The town also boasts various annual festivals, namely Botrivier Barrels and Beards Harvest Celebration (April), Botrivier Spring Weekend thus Drink Yourself Pink Festival (first weekend of September), Botrivier Barrel Fest (October), Van der Stel Pass Challenge (October), Botrivier Open Gardens (October) and the Annual Christmas Market held at Gabrielskloof (December) (Bot River 2016). Figure 4.58 shows some local vineyards and the interior of a wine cellar.



Source: Bot River (2016)

Figure 4.58 Landscape and barrels in a wine-tasting cellar on the Bot River Wine Route

The beautiful rows of vineyards are shown in Figure 4.58, along with wine tasting offered in a cellar.

Geographical factors for the production of quality wine grapes

Cooling afternoon winds blow up the valley off the ocean giving a mean February temperature of 21.2°C and an average annual rainfall of 653 mm (Aspect 2015). Soils are mainly from homogenous Bokkeveld shale (predominantly Glenrosa and Klapmuts) and Table Mountain sandstone. Chenin Blanc, Sauvignon Blanc, Pinotage, Shiraz and other Rhône varieties fare particularly well in the Botrivier area (Aspect 2015).

The Bot River Wine Route comprises 13 wine farms and estates of the Bot River Vineyard Association. These wine farms are grouped at the end of the Houwhoek Pass where they are the doorway to the Walker Bay wine-growing district. The Bot River Wine Route has an assortment of co-operative, family-owned and privately-owned wine farms and estates, of which seven (54%) participated in the study. Figure 4.59 shows the location of eleven farms on the Bot River Wine Route. Within a 10 km range from the nearest (between Hawston and Kleinmond) to the furthest wine farm, wine tourists can experience country hospitality and taste wines made of grapes from the oldest vines in the region and from some novel varietals of new plantings.

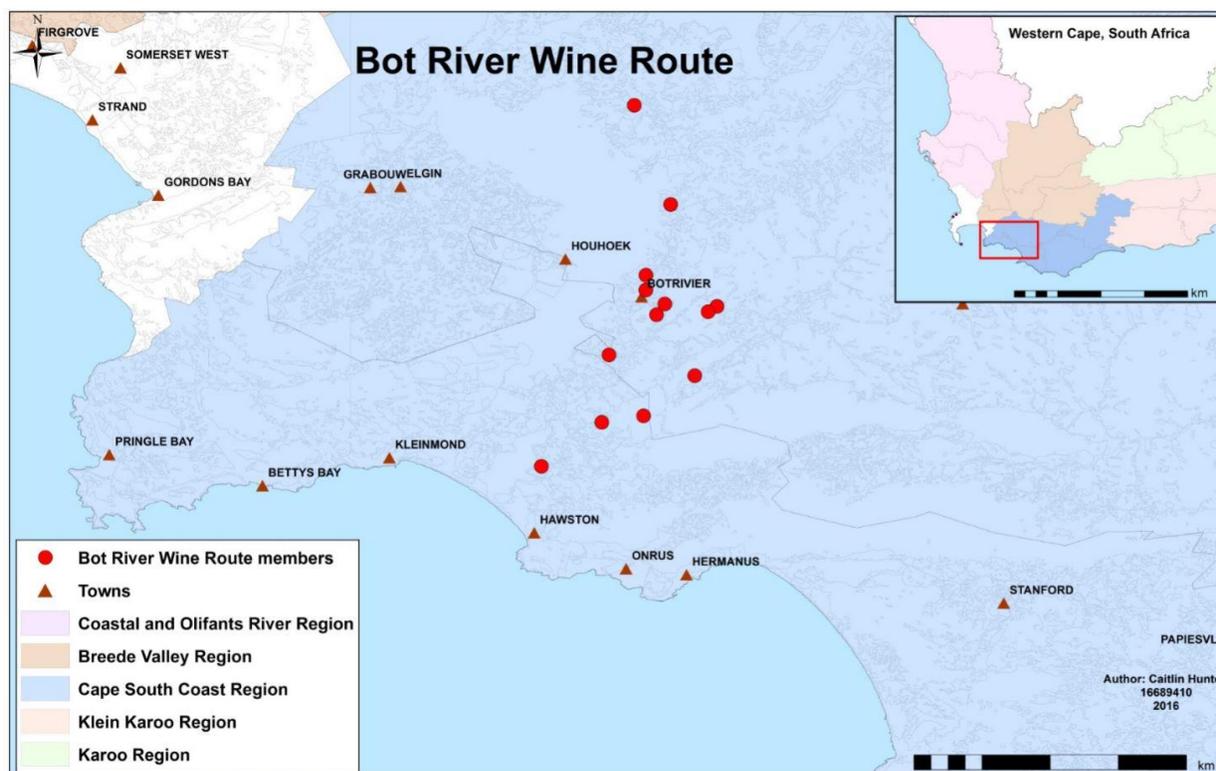
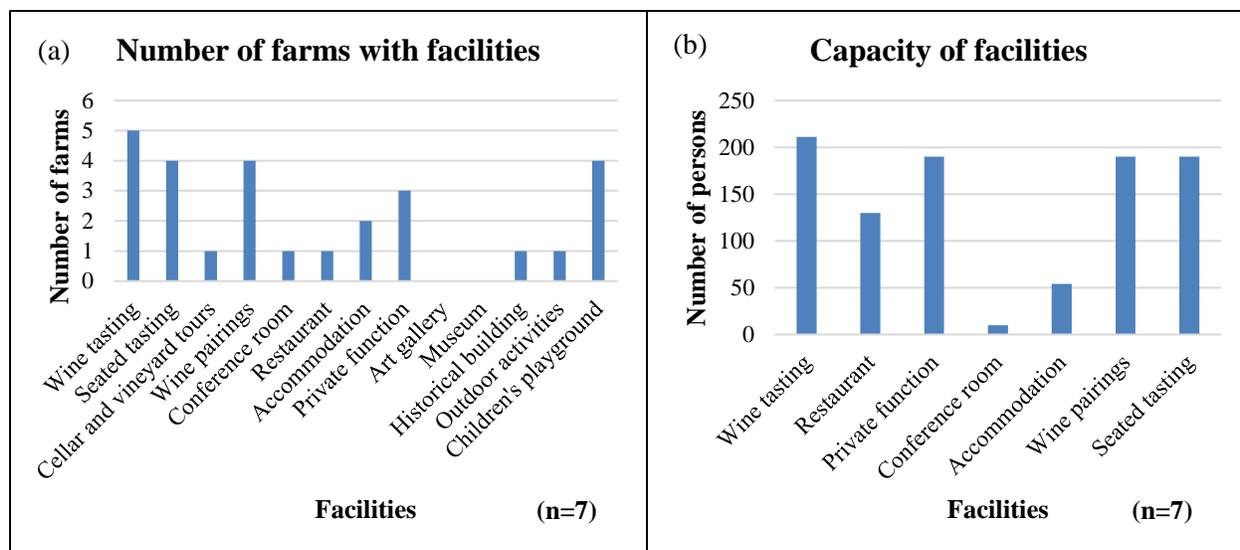


Figure 4.59 Distribution of the member wineries of the Bot River Wine Route in the Cape South Coast Region

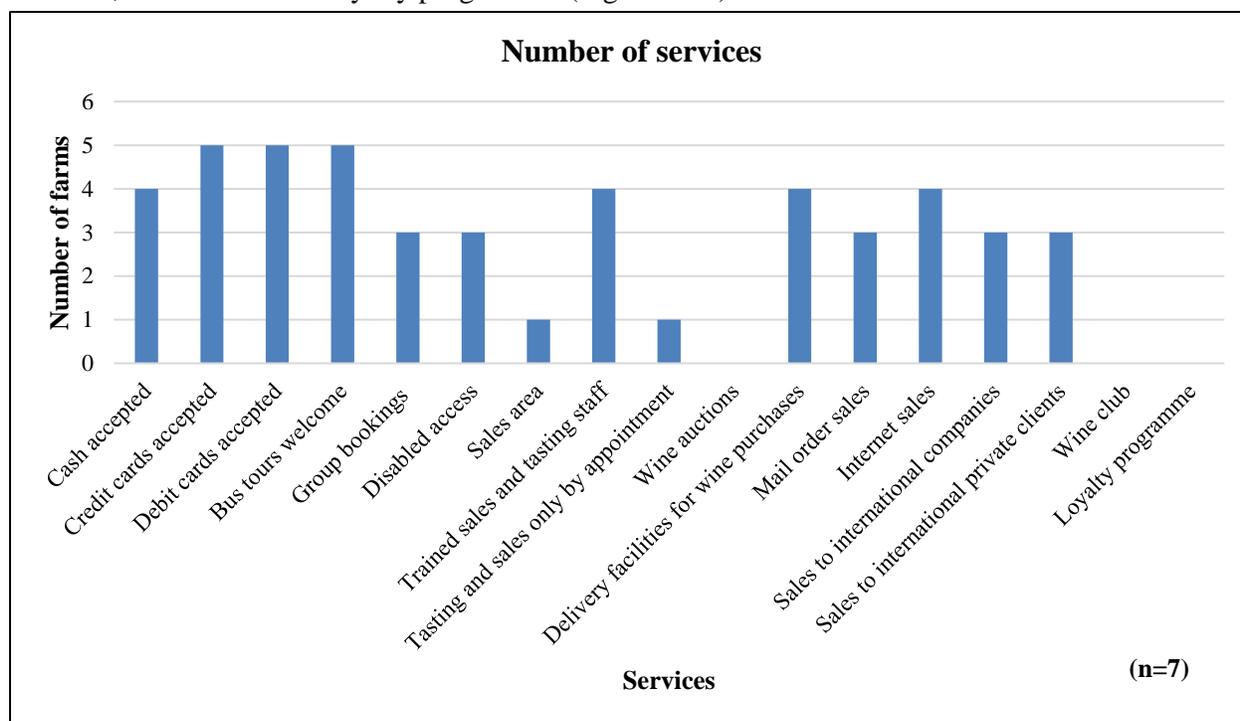
Figure 4.60a reveals that wine farms offer wine tasting (five farms), seated tastings (four farms), wine pairings (four farms), and private function venues (three farms), accommodation (two farms) and playgrounds for children (four farms). The route's farms have a meagre supply of restaurants, cellar and vineyards tours, conference rooms, historical buildings and outdoor activities. Art galleries and museums are absent. The focus of the route is on providing visitors with experiences that centre on wine and wine tasting. The facilities offered on the Bot River Wine Route have capacities for 211 for wine tastings (ranging between two and 100 people), 190 for wine pairings (with a minimum of 20 and a maximum of 100 people), almost 200 for all three private function venues (with a capacity ranging between 20 and 120 people), and 130 for the restaurant (minimum of 50 people and a maximum of 80 people). Accommodation and conference room capacities are relatively low (Figure 4.60b). The accommodation ranges are between 20 and 34 people. The conference room facilities have a maximum capacity of ten people. Clearly, the facilities for wine tasting and engaging in wine-related activities are the focus of the route.



Source: Wine farm questionnaire survey

Figure 4.60 Bot River Wine route: Number of farms with facilities and capacity of facilities

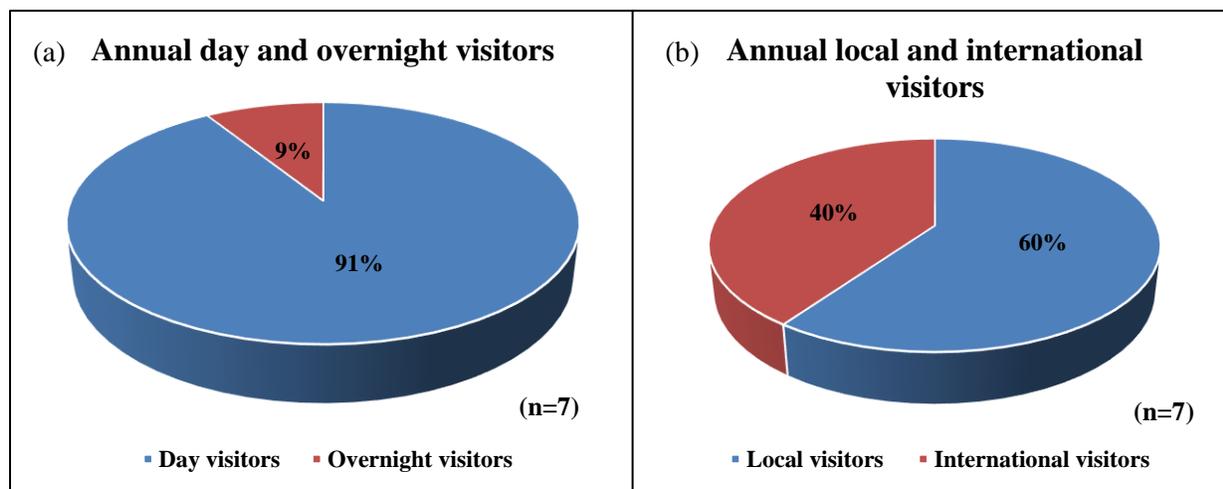
Almost all participating members sell wine internationally to companies and private clients, offer Internet and mail order sales, as well as delivery facilities, has trained tasting and sales staff, welcomes bus tours and accept credit cards, debit cards and cash. However, this route lacks in offering wine auctions, a wine club and loyalty programme (Figure 4.61).



Source: Wine farm questionnaire survey

Figure 4.61 Bot River Wine Route: Number of wine route members offering services

Figure 4.62a and 4.62b show the ratios between the annual day (91%) and overnight (9%) visitors and the local (60%) and international (40%) visitors respectively. The Bot River Wine Route relies heavily on local visitors visiting the wine farms/estates only on a day trip.



Source: Wine farm questionnaire survey

Figure 4.62 Bot River Wine Route: Visitor origins and stays

The development scores attained by this route is good. Wildekrans Wine estate has the highest development score (42). Other scores include 29 (Luddite), 25 (Benguela Cove), 21 (Barton Vineyards), 16 (Gabriëlskloof) and one for Feiteras wines and Eerste Hoop. The local visitors originate mostly from Cape Town, Johannesburg and the Hermanus area, each spending about R300 a day. The majority (60%) of the international visitors come from the United Kingdom, Germany and the Netherlands, also spending about R300 on a day trip. The route's tourist superstructure is not yet well developed but the route does exalt wine at the core of its activities. Next, the Plettenberg Bay Wine Route is explored.

4.2.3.13 Elgin Valley Wine Route: Not just apples

Location, historical and tourism contexts

Originally called Koffie Kraal, the village of Elgin is in lush land encircled by mountains in the Overberg region. This broad upland valley about 70 km south-east of Cape Town lies a short way east of the Hottentots-Holland Mountains (South African Tourism 2016). The Elgin region is centred on the town of Grabouw. The name Elgin was loaned from the farm Glen Elgin, a portion of which was given over to the railways for the erection of the local railway station. The railway line from Sir

Lowry's Pass reached Elgin in 1 August 1902. Grabouw, in the heart of the Elgin Valley, is internationally known as the place in South Africa where apples come from because this area produces 60% of the national apple crop (Elgin Valley Tourism Bureau 2016). The Elgin valley is also known for pears, greenhouse cut flowers, rose growing and the production of high-quality cool-climate wines. Before becoming a world-famous apple-farming area in the early 1900's, the valley was a small community living around trading stores and stopovers for ox wagons such as the historic Houwhoek Inn. Grabouw was built on the farm called Grietjiesgat which was obtained in 1856 by a painter, Wilhelm Langschmidt, and named after the German town where he was born (South African Tourism 2016). Tourist attractions in the area include hiking in the nature reserves that surround the town, as well as the many farm stalls, restaurants and wine farms. The town is a popular holiday and wedding destination and its proximity to Cape Town and Cape Town International Airport has made it an accessible getaway for both international visitors and Cape Town residents.

In its magnificent setting on the banks of the Palmiet River and a private lake in the Elgin Valley, Lothian Vineyards is exceptional in its production of Burgundian-style Pinot Noirs, Chardonnays, Rieslings and Rosés. The Wilson family applies non-interventionist, artisanal wine-making techniques. Lothian Estate is distinguished by nature, positioned in the Kogelberg Biosphere where 1654 plant species are found. Guests at Lothian House are treated with sightings of rare Cape Leopard, African Fish Eagle, Cape Clawless Otter and Cape Eagle Owl and an array of outdoor experiences (Elgin Valley Tourism Bureau 2016). Arumdale is well-known for its Cabernet Sauvignon, Arumdale Shiraz and Sauvignon Blanc. This estate is one of the first to focus on red wine made from late harvested, fully ripened fruit. Mark Simpson currently runs the estate and the first commercial Elgin Shiraz was planted in 2000. The grapes are now produced at the Villiersdorp cellar. There are no tasting facilities, but visitors are able to order the wines online (Wined 2016). Figure 4.63 features two Elgin winescapes.



Source: South African Tourism (2016)

Figure 4.63 Winescapes in the Elgin Valley Wine Route

Figure 4.63 shows the vineyards and views of the De Rust Farm on the Elgin Wine Route.

Geographical factors for the production of quality wine grapes

The high-lying, cool-climate Elgin district is cradled in an inland plateau at an altitude of 200-1000 m and surrounded by the ancient sandstone Hottentots-Holland Mountains where medium-structured, often ferruginous soils developed from Devonian Bokkeveld shale parent material occur (Aspect 2015). Winters are cold with abundant rain. Average annual rainfall is 1011 mm. Summers are warm with cold nights accompanied by south-easterly sea breezes, ideal for the production of premium quality red and white wines. The mean February temperature is 19.7°C. Vineyards benefit from the high altitudes, with some lying 400 m and higher above sea level. A series of rolling hills set in an undulating countryside present favourable sites for vineyards (Aspect 2015).

The Elgin Valley Wine Route has 17 members. Seventy-five per cent of the wine farms are privately owned, the others being company owned. Fifty-six per cent of the members are open to the public. Forty-four per cent of the members are only open by appointment, although some are open to the public over weekends. Figure 4.64 shows the distribution of the member wineries of the wine route.

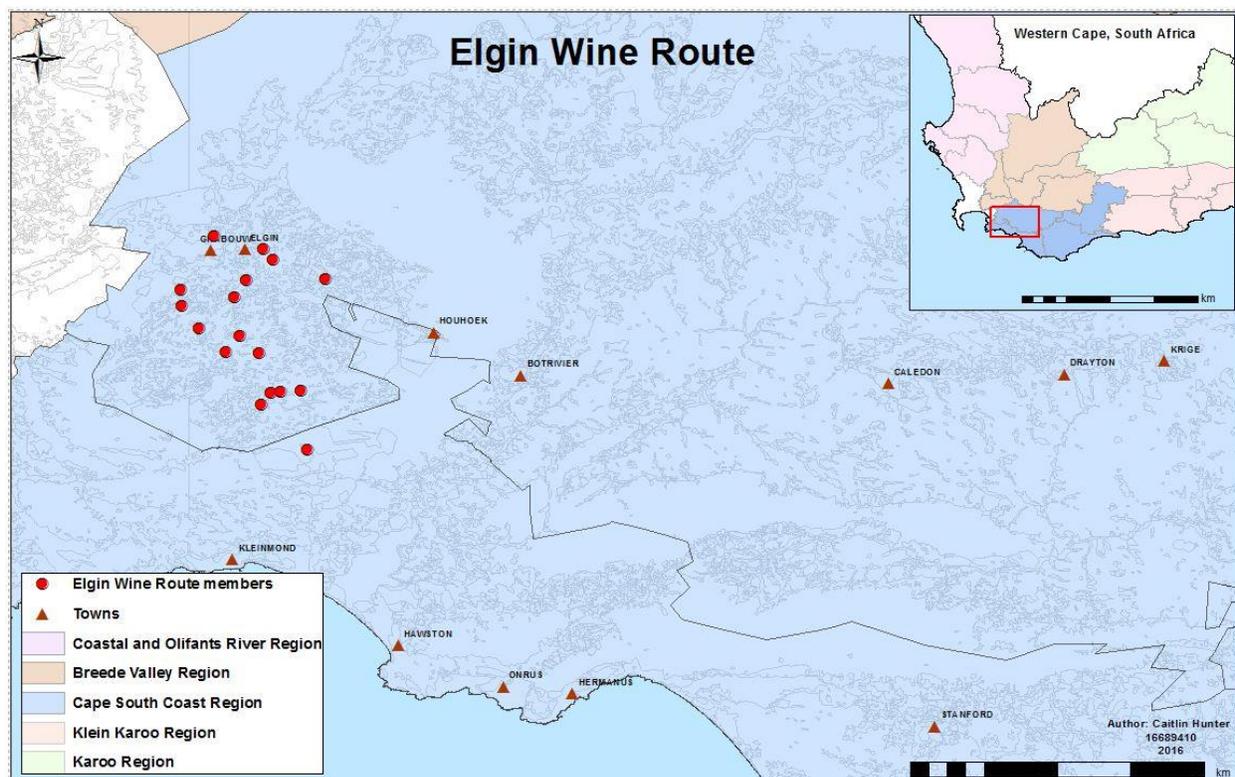
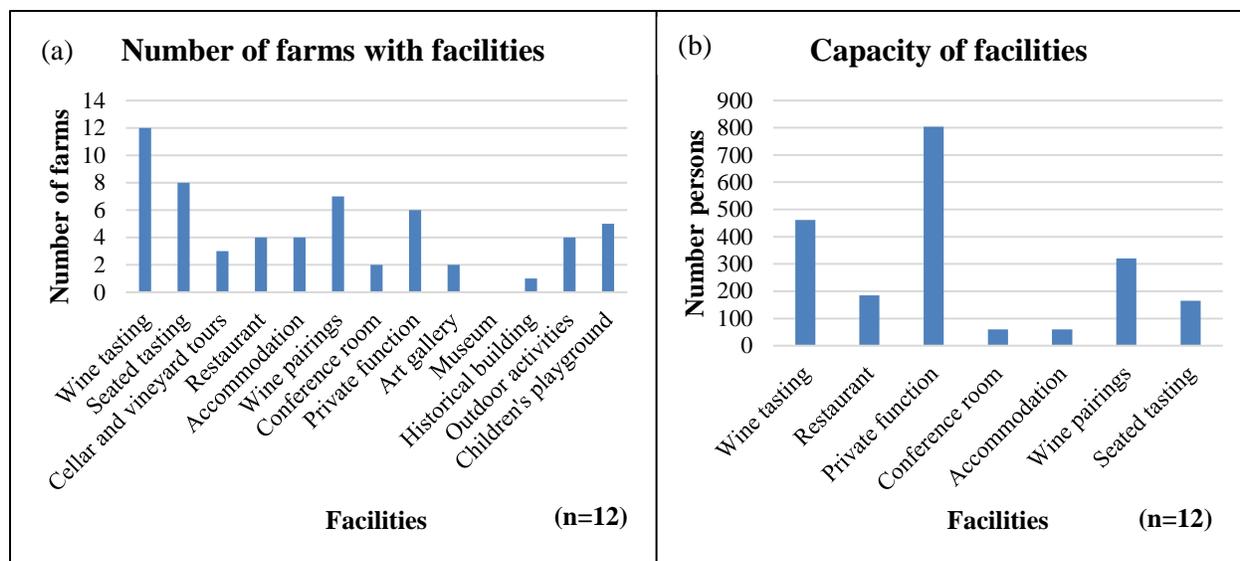


Figure 4.64 Distribution of member wineries in the Elgin Valley Wine Route in the Cape South Coast Region

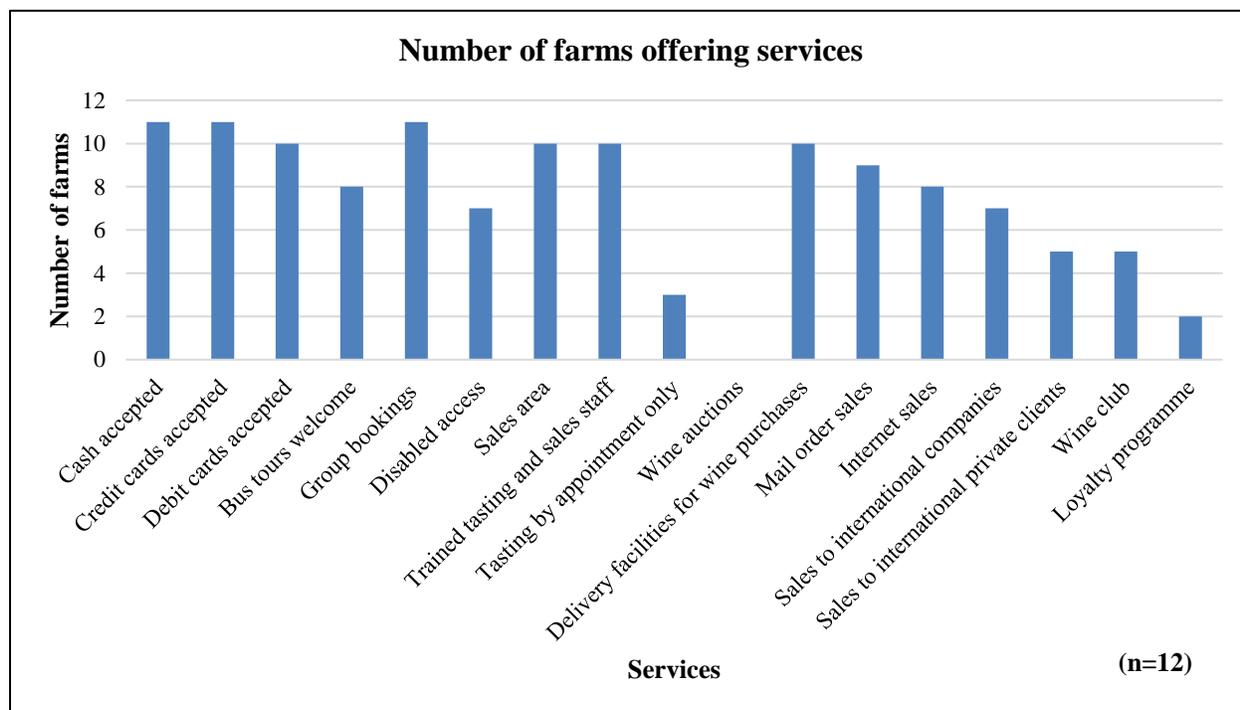
Figure 4.65a shows that all the participating members offer wine tasting facilities, two out of three cater for seated tastings, three out of five offer wine pairings, one out of two have private function venues and children's playgrounds. One out of three farms have restaurants, accommodation and outdoor activities. Figure 4.65b shows that the private function venues can accommodate 800 people (with a minimum of 24 people and a maximum of 300 people), 450 people for wine tasting (with a minimum of 16 people and a maximum of 200 people on a single node) and just under 200 people for restaurant experiences (with a minimum of 30 people and a maximum of 80 people). However, 60 people can be accommodated for overnight stays on the Elgin Wine Route, accommodating between eight and 20 people.



Source: Wine farm questionnaire survey

Figure 4.65 Elgin Valley Wine Route: Number of farms with facilities and capacity of facilities

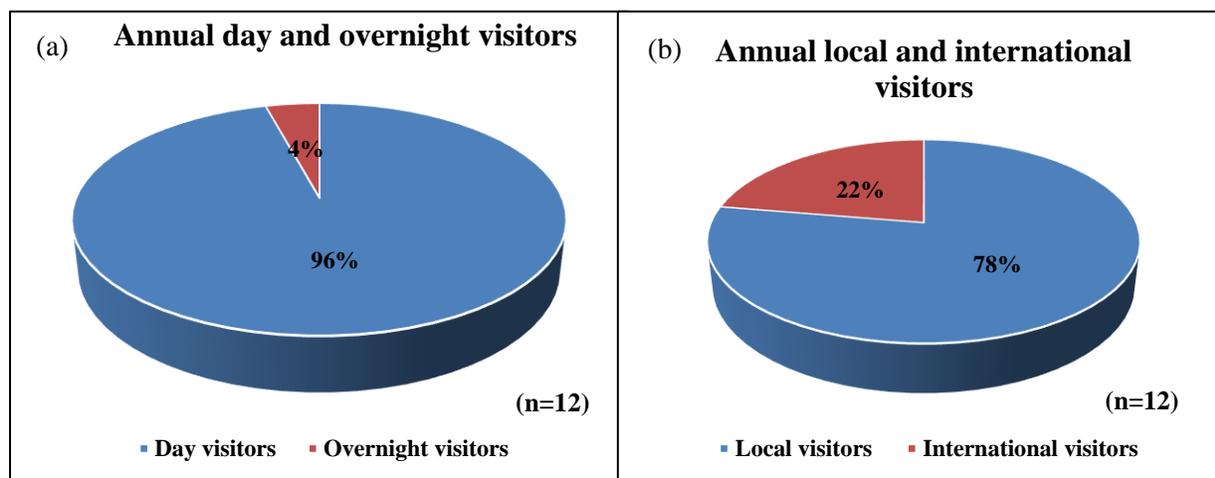
Twelve of the listed services are offered by more than 50% of the participating members (Figure 4.66). Sales to private clients, wine clubs and tasting by appointment only are less well represented: loyalty programmes and wine auctions even less.



Source: Wine farm questionnaire survey

Figure 4.66 Elgin Valley Wine Route: Number of wine route members offering services

Figure 4.67b reveals that most of the visitors are local visitors and a clear majority of visitors are day trippers (Figure 4.67a). Total annual visitation is 14 000. International visitors are from Germany, Sweden and Belgium and local visitors are mostly from Cape Town, Johannesburg and Durban, and they spend up to R1000 each per day. International visitors spend between R50 and R600 each per day.



Source: Wine farm questionnaire survey

Figure 4.67 Elgin Valley Wine Route: Visitor origins and stays

The highest development score achieved by this route was 46 (Lothian Wines), with five farms achieving scores between 34 and 40. The lowest score achieved were from Arumdale (11). Even though this route is situated in an apple-growing region, the wine route attracts many day visitors, especially locals. Facility development should focus on increasing overnight accommodation facilities and capacity and providing more restaurants. The next wine route is discussed in Cape Town's metropolitan area.

4.2.3.14 Hermanus Wine Route: Heaven on earth

Location, historical and tourism contexts

Hermanus was founded in the early 1800s by Hermanus Pieters who happened upon the area when searching for better grazing for his livestock (Hermanus History & Heritage 2016). A freshwater spring and excellent grazing pastures convinced him to stay and soon other farmers and fishermen followed to the plentiful area. Word about the natural beauty and bountiful ocean of the area spread and by the 1890s the town had two schools, two churches, various shops and a thriving fishing industry. Hermanuspietersfontein (the town's original name) continued to expand as more people were attracted to the town, but unfortunately the name was less appealing. The unusually long name created

problems for the postal services so that the postmaster shortened it to Hermanus in 1902. The town grew and received municipal status in 1904 (Hermanus History & Heritage 2016). The town's thriving fishing and business industry required better and faster means for the transportation of goods to and from the town. The solution was to extend the railway line from Bot River to Hermanus. The plans did not sit well with the Head of South African Railways and Harbour Services, Sir William Hoy. Sir William and his family often vacationed in Hermanus and he believed that pollution from the trains and extra holidaymakers would spoil the town's tranquillity. The plan was overruled and a horse-and-carriage service between the two towns was established (Hermanus History & Heritage 2016). The Hermanus train station is the only one in the world where no train has ever arrived or departed. Today the Hermanus Tourism Bureau operates from this historically important building.

Activities offered by this beautiful coastal town include visits to Fernkloof Nature Reserve, various beaches (Grotto and Voëlklip Beaches), Hermanus Country Market, the Lembu Gallery and Studio, shark-cage diving, hiking tours, boat tours, scuba and snorkelling, numerous gift and crafts shops and stalls in the centre of the town, the Whale House Museum and whale and dolphin watching (Hermanus Wine Route 2016). The town also stages various festivals, namely Hermanus Whale Festival held annually (September-October), the Hermanus Flower Fair (September), Hermanus Kalfieffes (August), Hermanus Fyn-Arts Festival (June), Pinot Noir Weekend (January), Wheels and Runners Race (middle May), Hermanus Fish Bash (April/May), Hermanus Beer Festival and the Hermanus Book Festival (Hermanus Festivals 2016). Figure 4.68 shows the Hermanus landscape.



Source: Hermanus Winelands (2016)

Figure 4.68 Aerial view of the landscape on the Hermanus Wine Route

The aerial view of the Hermanus Wine Route along the Walker Bay District's R320, illustrates the beautiful surrounding landscapes through the Hemel-en-Aarde area with the Atlantic Ocean on the right.

The Hermanus Wine Route is situated along the Walker Bay wine-growing district's R320 road and the scenic area known as the Hemel en Aarde. The route's winemakers specialise in distinctive, origin-specific wines (Hermanus Wine Route 2016). Plantings are limited to grape varieties in soil types that complement the terroir-driven style aimed for. The Hemel en Aarde wine district offers arguably the best Chardonnay and Pinot Noir the Cape has to offer. This route unites 15 wineries, each growing small volumes of premium-quality wine in carefully and sustainably managed vineyards (WOSA 2016).

One of the wine farm members on the Hermanus Wine Route is the vineyards of La Vierge ('The Virgin' in French), that is characterised by long cool summers influenced by the proximity of the Atlantic Ocean. La Vierge has a good selection of dry, white, red, fruity, full and mineral wines. Visitors can enjoy great food in their restaurant with a spectacular view, wine tasting and cellar tours. Domaine des Dieux was the first producer of MCC in the Hemel-en-Aarde region. This farm produces a small range of quality wines which includes their Sauvignon Blanc, Chardonnay, Josephine Pinot Noir, Syrah Mourvedre, Claudia Brut MCC and Rosé of Sharon Brut Rosé MCC. Visitors can taste their wine by appointment and also purchase online (Domaine de Dieux 2016).

Geographical factors for the production of quality wine grapes

The route encompasses three wards: Hemel-en-Aarde Valley, Upper Hemel-en-Aarde Valley and Hemel-en-Aarde Ridge. Hemel-en-Aarde Valley is the first appellation in the valley, the closest to the Atlantic Ocean and home of the first vineyard planted in the area (Aspect 2015). Upper Hemel en Aarde Valley is the second ward up the valley and the largest of the three. Hemel en Aarde Ridge is the smallest ward, and lies farthest from the sea where ripening generally occurs later than in the other two Hemel-en-Aarde appellations (Aspect 2015). The cool climate is the sought-after attribute resulting from the persistent cooling winds from the ocean that ensure favourable ripening conditions, curtail excessive vigour, so adding dimensions conducive to high quality (Platter 2016). The average mean February temperature is 20.3°C and the average annual rainfall is 722 mm. The soils are generally variable and derived from sandstone, shale or granite intrusions (Platter 2016). The majority of the

vineyards in the Hemel-en-Aarde appellation are planted on northeast-, north- and northwest-facing slopes of Bokkeveld shale-derived soil on the southern side of the Onrust River. The soil has an unusually high clay content varying from 25 and 55%. The clay contents approximate those of the Côte d'Or in Burgundy, although they are shallower and far stonier. Recommended varieties are Chardonnay, Chenin blanc, Sauvignon Blanc, Merlot, Pinotage, Pinot Noir and Shiraz all on the coolest landscape positions (Aspect 2015). The Hemel en Aarde Valley is reputed for its benchmark Chardonnay and Pinot Noir wines. Fine examples of Sauvignon blanc, Merlot and Shiraz are also produced. The area is noted for the outstanding and consistent quality of its Pinotage (South African Tourism 2016). Figure 4.69 shows the linear arrangement of wineries along the Hermanus Wine Route.

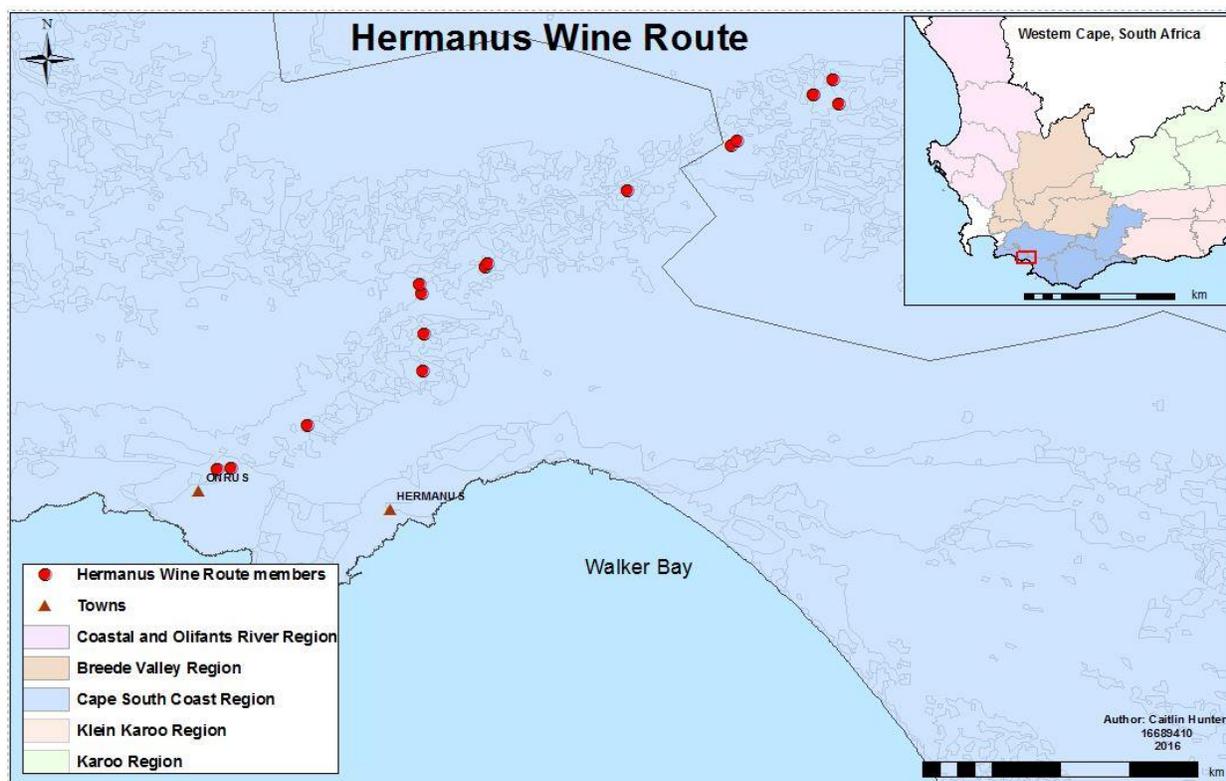
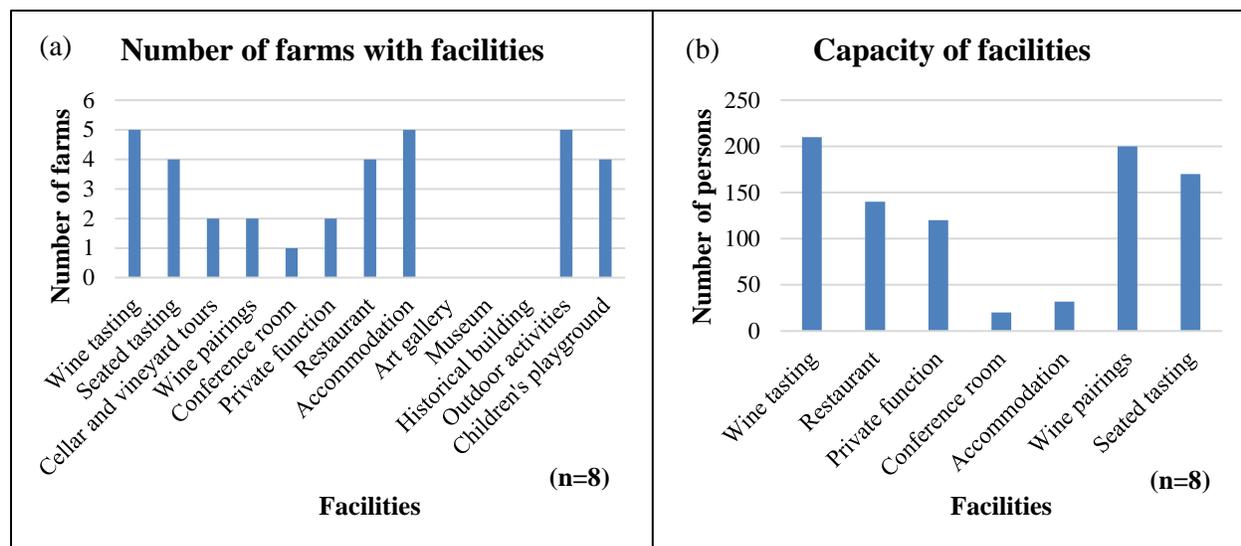


Figure 4.69 Distribution of members of the Hermanus Wine Route in the Cape South Coast Region

Fifty-three per cent of the 15 route members participated in the research. Seventy-five per cent of the wine farms in Hermanus are privately owned. Regarding trading hours, most (53%) operate during the week, over weekend and on public holidays. The others (47%) are open by appointment only. The Hemel-en-Aarde route offers a special experience for the visitors, with breath-taking views and a wide range of facilities. Figure 4.70a shows the facilities provided on the route by the participating members. Sixty-three per cent offer wine tasting, 50% seated tastings, 63% accommodation facilities (self-catering houses or chalets), 50% restaurants, 25% cellar and vineyard tours, 25% wine pairings, 25%

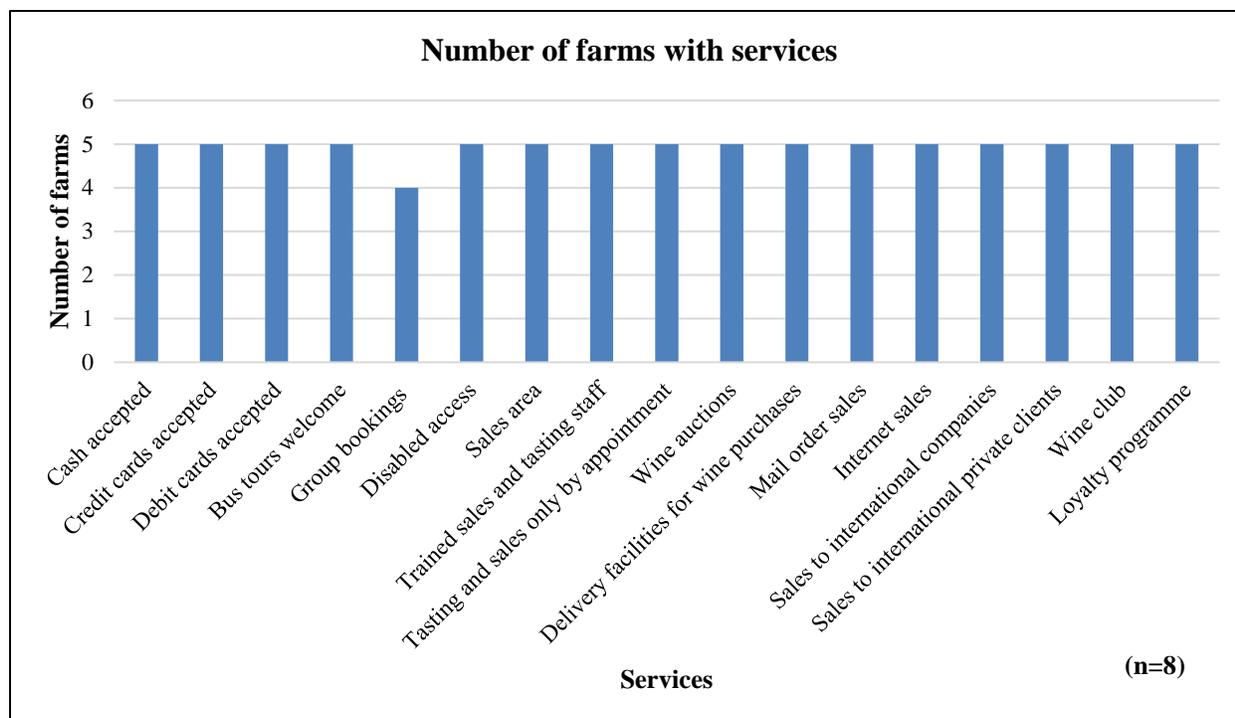
private function venues, and 63% outdoor activities, such as hiking, mountain biking and horse riding. Participating route members can accommodate a total of 210 people at wine tasting, 140 patrons can be served in the restaurants, 200 for wine pairings, 170 for seated tastings and 120 in the private function venues (Figure 4.70b).



Source: Wine farm questionnaire survey

Figure 4.70 Hermanus Wine Route: Number of farms with facilities and capacity of facilities

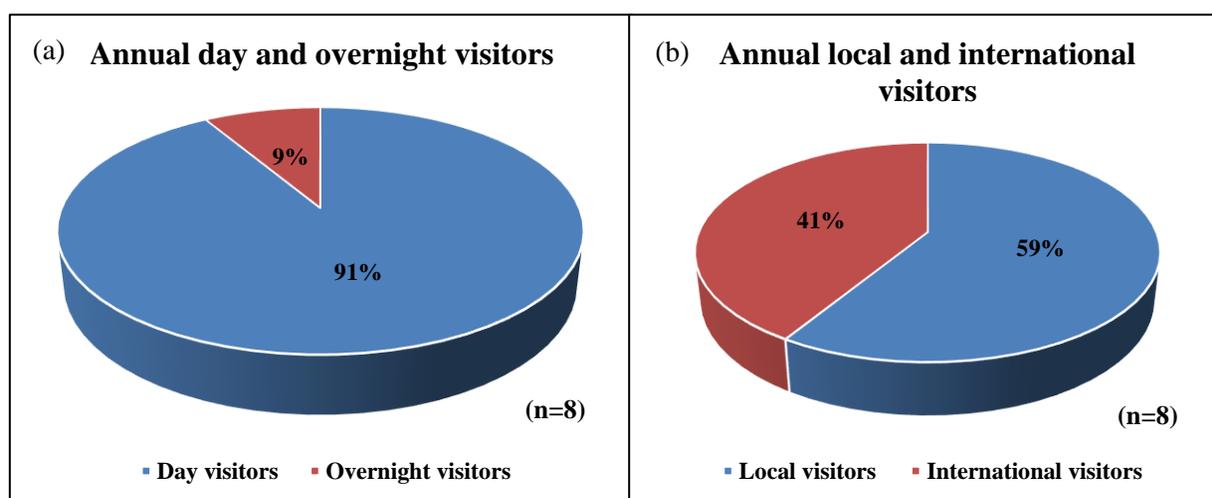
The majority (63%) of the participating wine farms and estates on the Hermanus Wine Route offer all but one (group bookings) of suggested services to their visitors (Figure 4.71). Group bookings demand adequate facilities and capacities which are not always available. The survey revealed that group bookings of 20 to 30 people can be made.



Source: Wine farm questionnaire survey

Figure 4.71 Hermanus Wine Route: Number of wine route members offering services

The visitors to the Hermanus Wine Route are in the age groups 35-44 and 45-54, and there is an equal (50/50) split between female and male given that most of the visitors are couples. Figure 4.72a shows that day visitors (21 300) to the route predominate (91%). Regarding the origin of visitors, 12 575 (59%) were local and 8 825 (41%) international visitors (Figure 4.72b).



Source: Wine farm questionnaire survey

Figure 4.72 Hermanus Wine Route: Visitor origins and stays

The international visitors mostly originate from the United Kingdom, Germany, Italy and Sweden and the local visitors from Cape Town, Pretoria and Durban. The average spends per visitor per day when visiting a winery on the Hermanus Wine Route are R100 to R500 by local visitors and R200 to R600 by international visitors.

The Hermanus Wine Route is well developed regarding tourist superstructures available to the wine tourist while there is potential to develop even more by adding more art, cultural and historical features. The development scores also indicate how well the route is developed. The highest development score is 40 for La Vierge, followed by Sumaridge (39), Hamilton Russell Vineyards (23), Newton Johnson (22), Buchard Fynlayson (22), Atraxia (three), Ashbourne (three) and Domaine des Dieux (one). The farms with the higher development scores are more developed in terms of tourist superstructure, while the farms with the lower development scores are mostly by appointment only.

4.2.3.15 Stanford Wine Route: The Victorian village

Location, historical and tourism contexts

In the early 19th century, Sir Robert Stanford, a retired officer of the British army, bought the farm Kleine Riviers Valley and turned it into a highly successful enterprise supplying fresh produce to the passing ships at Cape Town. The fertile valley is the site of Stanford, a beautiful village where its architectural heritage and pastoral character have been well preserved (Stanford 2016). Stanford is about 25 km from Hermanus and is located on the popular Cape Whale Coast Route. This Victorian-influenced village on the banks of the Klein River is considered by some as an undiscovered gem, but it is fast becoming a popular weekend getaway destination 150 km from Cape Town. A variety of accommodation establishments abound and there is much to explore and experience in the area. Wine farms in the Stanford area belong to the Stanford Wine Growers Association, established in 2007 for winemakers to get acquainted with one another, market their wines jointly, and to pool viticultural, winemaking and other management information. The route became an official wine route of South Africa in 2015 (South African Tourism 2016).

The route is small with only eight members. However, expansion is inevitable as Stanford's unique terroir is bound to attract new entrepreneurs. Eighty-eight per cent of the route members (7 out of 8) participated in the research. Figure 4.73 shows the distribution of all the members of the Stanford Wine

Route, namely Boschrivier, Misty Mountains, Raka, Springfontein, Stanford Hills, Sir Robert Stanford, Vaalvlei and Walker Bay Vineyards at Birkenhead Brewery (WOSA 2016).

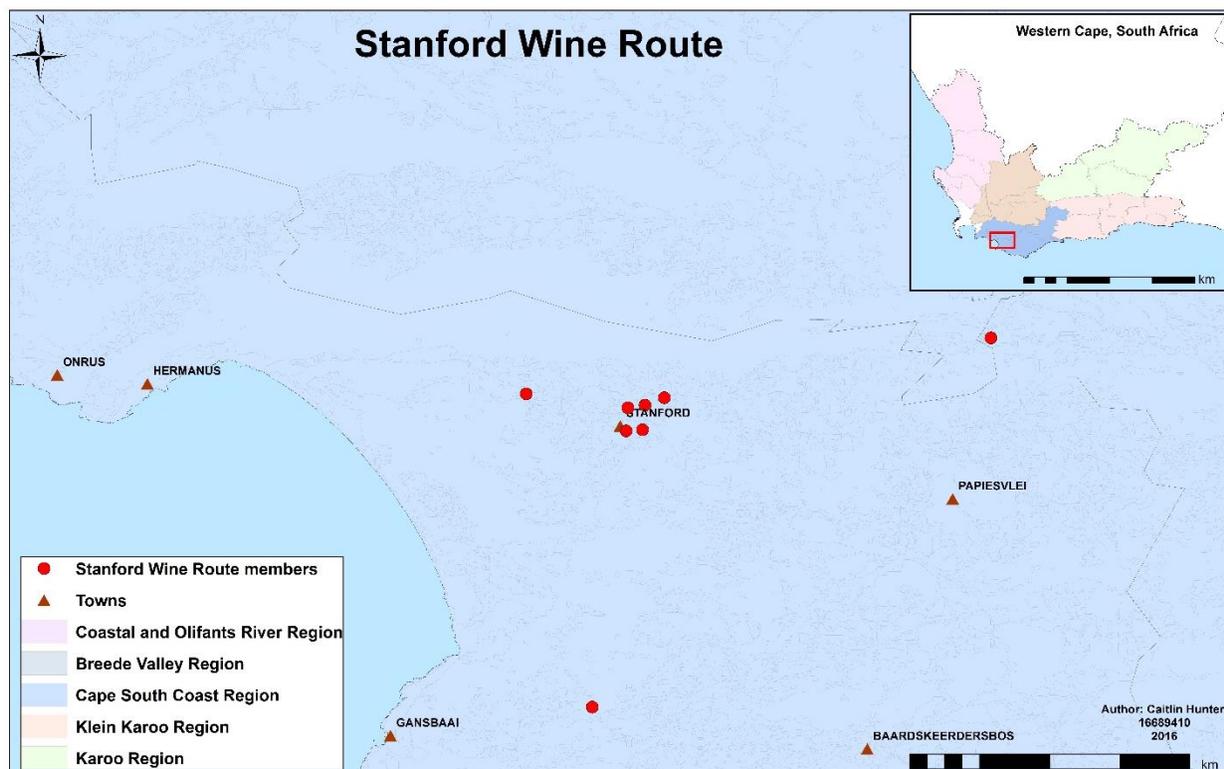


Figure 4.73 Distribution of the member wineries of the Stanford Wine Route in the Cape South Coast Region

The hands-on family ambience of the wine farms of Stanford Hills, Boschrivier, Misty Mountains and Vaalvlei is an attraction. Owners Peter and Jami Kastner run a charming cellar, restaurant and farmhouse accommodation at Stanford Hills Estate (Stanford 2016). Peter Kastner makes three styles of Pinotage, called Jackson's, Veldfire and Pinotage grappa, as well as cool-climate Chardonnay and Sauvignon Blanc. The Drift Farm is focused on family. The farm includes overnight accommodation facilities in luxury self-catering units and wines include 'There are Still Mysteries' (Pinot Noir), 'Year of the Rooster Rosé', 'Moveable Feast Estate Blend' and 'Gift Horse Barbera'. The farm also plant organic produce which are available to the guests and a selection of farm stalls in the area (The Drift 2016). Stanford is ideally positioned for couples and families looking for a laid-back getaway (or 'slow food weekend') in a quaint and historic village that remains true to its entrepreneurial roots. Activities offered in the area include visiting the antique stores, restaurants, vineyards or coffee shops. For the adventurous tourist, horse riding, boat cruises, hikes, bird watching and cage diving to see great white

sharks are all within a 20 km radius of the village (Stanford 2016). The eight member farms recognised the potential of vineyards in the area and are now making wine with great success. The wine makers often conduct the tastings themselves, pausing from their farm duties to enthusiastically present the fruits of their labour. A few keen *garagistes*¹⁰ in the village have taken advantage of the fertile soil and they have planted vineyards on their large erven, literally their own backyards. The Stanford wine tour can be combined with a beer tasting at Birkenhead Brewery and cheese tasting at Kleinrivier Cheese Farm, a small family-run cheesery, offering a range of exceptional, high quality, South African cheeses (Grootbos Private Nature Reserve 2016). Figure 4.74 shows the rural landscape of the Stanford area.



Source: Stanford Info (2016)

Figure 4.74 The ‘Victorian village’ of Stanford

The Victorian-influenced town of Stanford is illustrated in Figure 4.74, showing the Stanford Hotel and the church in the back.

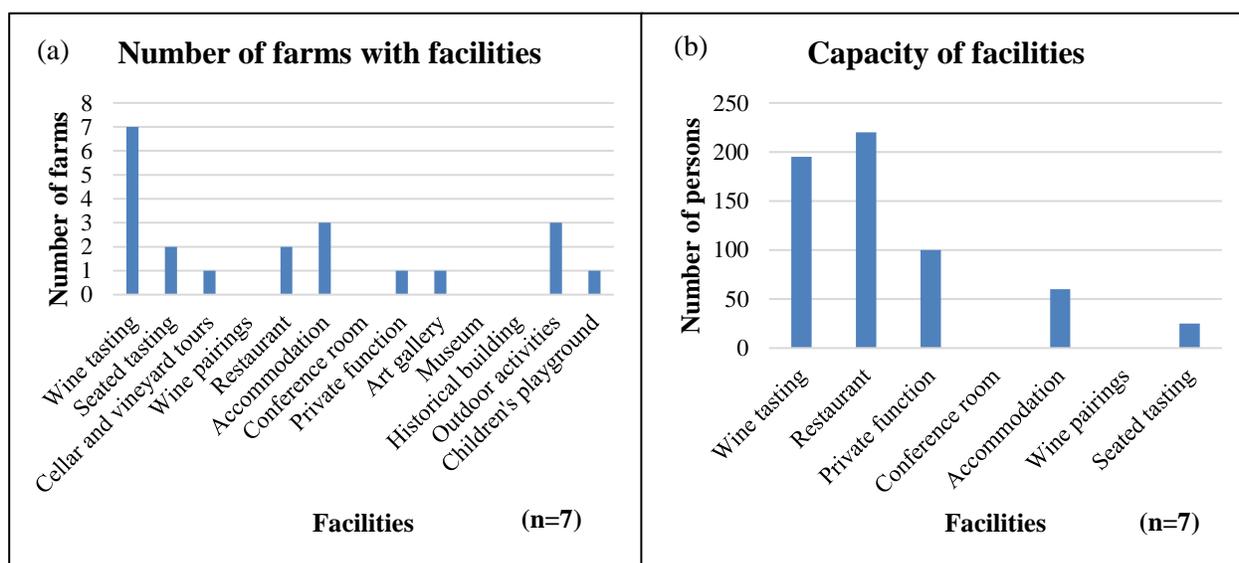
Geographical factors for the production of quality wine grapes

The vineyards are set on sandy dunes, rocky mountain slopes and fertile lands with the rare limestone soils of Springfontein, producing excellent wines with characteristics similar to some wines of Champagne and parts of Burgundy to the wide range of finely-balanced wines grown along the rich banks of the Klein River and the shale hillsides of the Akkedis Valley at Raka and Robert Stanford Estate (Aspect 2016). The diverse soil types and the proximity of the sea with its cooling maritime

¹⁰ Garagistes: ‘Garage wine’ (Stanford 2016)

breezes are elements which produce great Pinotage, Shiraz, Sauvignon blanc and Chenin blanc. Stanford is close to the southernmost tip of Africa at Cape Agulhas, making it one of South Africa's coolest wine-producing regions. The vineyards enjoy a cool ripening season, the result of the strong, cooling winds prevalent in summer. These conditions are ideal for the production of top quality and award winning wines (South African Tourism 2016).

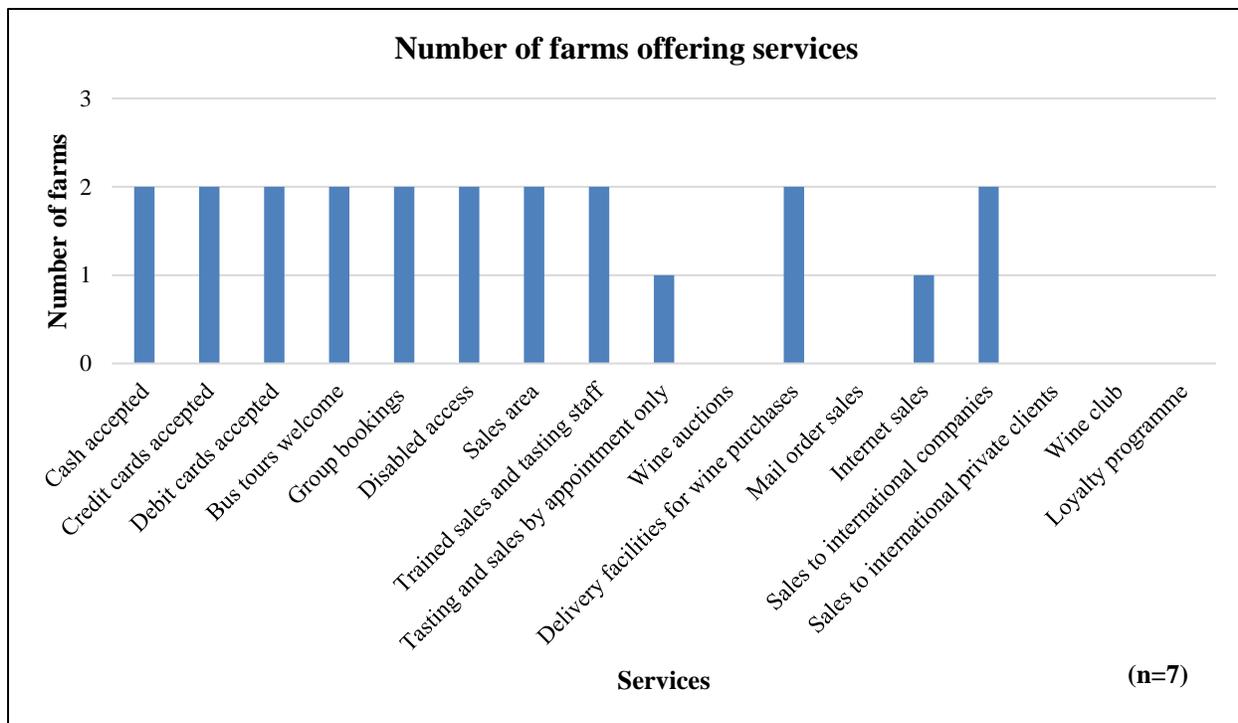
Although the Stanford Wine Route is quite new, the route offers wine tasting (seven wine farms), seated tasting rooms (two wine farms), restaurants (two wine farms), accommodation (three wine farms), a private function venue, an art gallery and outdoor activities (three wine farms) (Figure 4.75a). Regarding the capacity of the facilities, 195 people can be accommodated for wine tasting (with a capacity range between ten and 70 people), 220 people in the restaurants (they provide breakfast, lunch and dinner and has a capacity range between 20 and 120 people), 100 people in the private function venue and 60 people in the accommodation facilities (with a capacity range between 8 and 30 people) (Figure 4.75b). The accommodation types on offer are two manor houses and bed and breakfast.



Source: Wine farm questionnaire survey

Figure 4.75 Stanford Wine Route: Number of farms with facilities and capacity of facilities

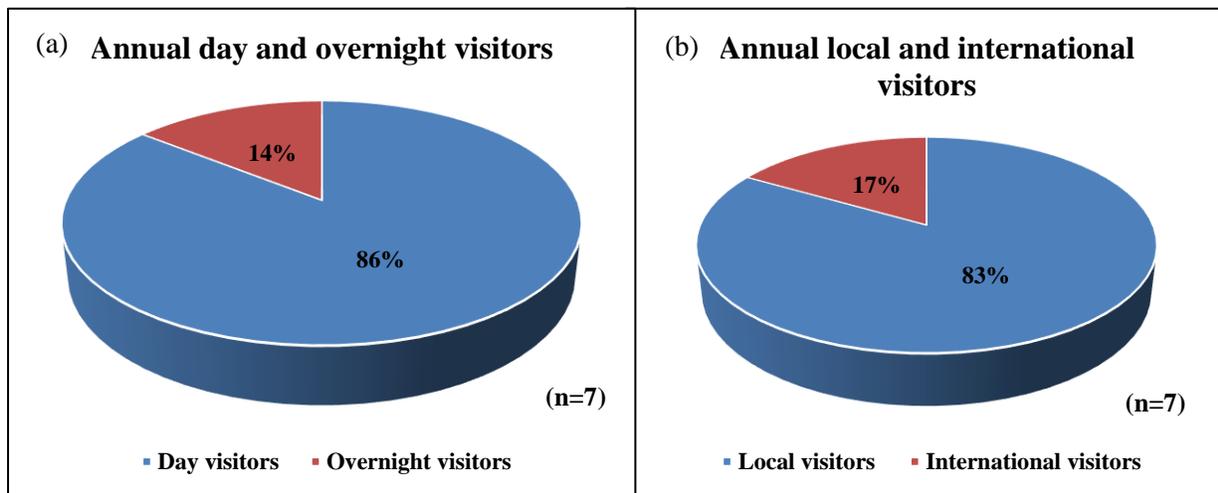
Of the twelve services offered by the members of this route ten are offered by two members each (Figure 4.76). Only one offers tasting by appointment and one has internet sales. None of the members offer wine auctions, mail order sales, wine clubs, loyalty programmes and sales to international private clients are offered by the members. This is a rather new wine route, thus this can be expected until their popularity as a wine tourism destination increases.



Source: Wine farm questionnaire survey

Figure 4.76 Stanford Wine Route: Number of wine route members offering services

Eighty-six percent of the visitors to the Stanford Wine Route are day visitors (6000) and around 1000 (14%) overnight visitors annually (Figure 4.77a). The majority (83%) of the visitors are local (5000 visitors) while international visitors (17%) number are about 1000 (Figure 4.77b).



Source: Wine farm questionnaire survey

Figure 4.77 Stanford Wine Route: Visitor origins and stays

The Stanford Wine Route consists of members who has development scores between 29 and nine. The Stanford Hills Estate scored 29, while three of the farms (Boschvriër Wine Estate, Lomond Wines and The Drift Farm) has the lowest development score (nine). This route has a good range between the highest and the lowest scores. Although Stanford is South Africa's youngest wine route, it has enormous potential for development because of the close proximity to Hermanus, the route can also attract the visitors travelling to and from Hermanus Wine Route. Having only eight route members creates a situation for strong network working between them. It is feasible for the visitors to visit all the member wineries on one day to enjoying the offerings at each wine farm. In terms of future potential, this route can explore the possibility of adding more restaurants and eateries as well as overnight stays, which will attract the lacking overnight visitors. The next section looks at the wine routes of the Klein Karoo Region.

4.2.3.16 Plettenberg Bay Wine Route: The Riviera of South Africa

Location, historical and tourism contexts

Plettenberg Bay, the 'Riviera of South Africa', has been called by many names over the past 500 years. In 1448, Portuguese explorer Bartolomeu Dias called it the 'Bay of Lagoons' (Plett Winelands Wine & Bubbly Route 2016). In 1576, his countryman, Manuel da Mesquita Perestrello, named it *Bahia Formosa*, Beautiful Bay. It was also called the Bay of Content, while in 1778 Cape Governor Baron Joachim van Plettenberg also named this town with his own name. Four years later Francois le Vaillant visited and his records call it 'Blettemberg Bay' (Plettenberg Bay Info 2016). He also inadvertently renamed the nearby Keurbooms River 'Queur Boom'. This part of the Garden Route in the Western Cape was first inhabited by Middle Stone Age people who lived in a series of caves along the coastline for more than 100 000 years (Boonzaaier, Malherbe, Smith & Berens 1996). The caves still yield tools and ornaments of the Khoisan who followed first inhabitants. In 1630, a Portuguese merchant ship called the *Sao Goncalo* floundered in Plettenberg Bay. About 100 of the crew went ashore and built a camp. They are noted as the first permanent European residents of what is now known simply as 'Plett' (Plett Winelands Wine & Bubbly Route 2016).

Plettenberg Bay offers tourists a variety of places to visit like Robberg Nature Reserve, Lawnwood Snake Sanctuary, Birds of Eden, the Monkey and Primate Sanctuary, the Elephant Sanctuary, Plett Puzzle Park, Plettenberg Beach, Jukani Wildlife Sanctuary and more. Plettenberg Bay also boasts an offering of outdoor activities and adventures, boat tours, cultural tours, horseback riding, gift shops, a

spa and wine tasting (WOSA 2016). In late November 2013 the local wine estate owners endorsed a Plett Tourism plan to develop an exclusive wine-and-bubbly-centred experience stretching from Harkerville to the Crag. The route now includes 16 wine farms and estates after being officially launched in 2014 (Plett Winelands Wine & Bubbly Route 2016). The wine route members produce some 80 000 bottles per annum and they assist on other wine farms to produce another 100 000 bottles per annum. Wineries mostly produce Sauvignon Blanc, the quality of which is considered to be on par with the wines of New Zealand's world-renowned Marlborough region. In 2000 Peter and Caroline Thorpe started planting wine grapes on the Bramon Wine Estate and in 2001 wine was produced by former Villiera Wines (in Stellenbosch) winemaker Anton Smal who is now vinifying all the grapes on the Plettenberg Bay Wine Route. This has led to tourists asking whether all the wines would taste the same to which the answer is simple that each vineyard has its own terroir and microclimate (Plett Winelands Wine & Bubbly Route 2016). Anderson Wines was established in 2007 by Bruce Anderson. The vineyards cover three hectares on the western side of the farm. In 2012 Ian Anderson took over the business. The first bottling of Anderson Wines was in 2011, their wines include the 'Leto Venus Sauvignon Blanc' (Anderson Wines 2016).

The Plettenberg Bay Wine Route has nine route members, each offering their exclusive wines and it hosts an annual Sasfin Plett Wine and Bubbly Festival (South African Tourism 2016). Figure 4.78 shows some wine farms on the Plettenberg Bay Wine Route.



Source: Plett Winelands Wine & Bubbly Route (2016)

Figure 4.78 Wine farms on the Plettenberg Bay Wine Route

Figure 4.78 shows the beautiful wine farms on the Plettenberg Bay Wine Route with its significant sunset views.

Geographical factors for the production of quality wine grapes

The Plettenberg Bay area is characterised by cool climatic conditions. Plettenberg Bay is located in the Knysna Afromontane Forest biome and receives an annual rainfall of 945 mm, with temperatures ranging from 10-23°C. Extreme temperatures are prevented by the southern slopes of the Tsitsikamma and Langkloof Mountain ranges containing moisture in the bay and cool sea breezes. The soils are ideal for producing grapes for Sauvignon Blanc, Pinot Noir and sparkling wines (South African Tourism 2016).

Fifty-six per cent of the nine members participated in the research. Figure 4.79 shows the wine route of Plettenberg Bay. Eighty-nine per cent of the participating member wineries are privately owned and eleven per cent company owned. Fifty-five per cent of the participants are open to the public and are open during the week, over weekends and on public holidays. Forty-five per cent of the participants accept visitors by appointment only.

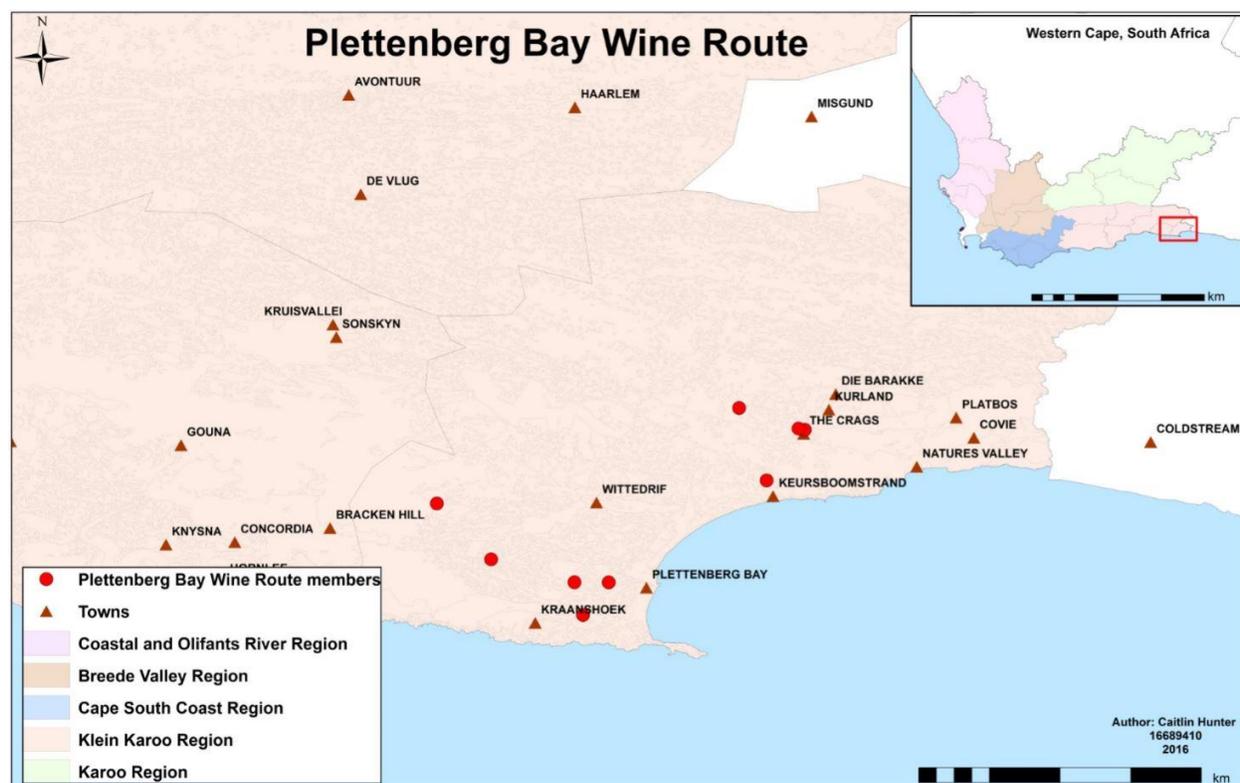
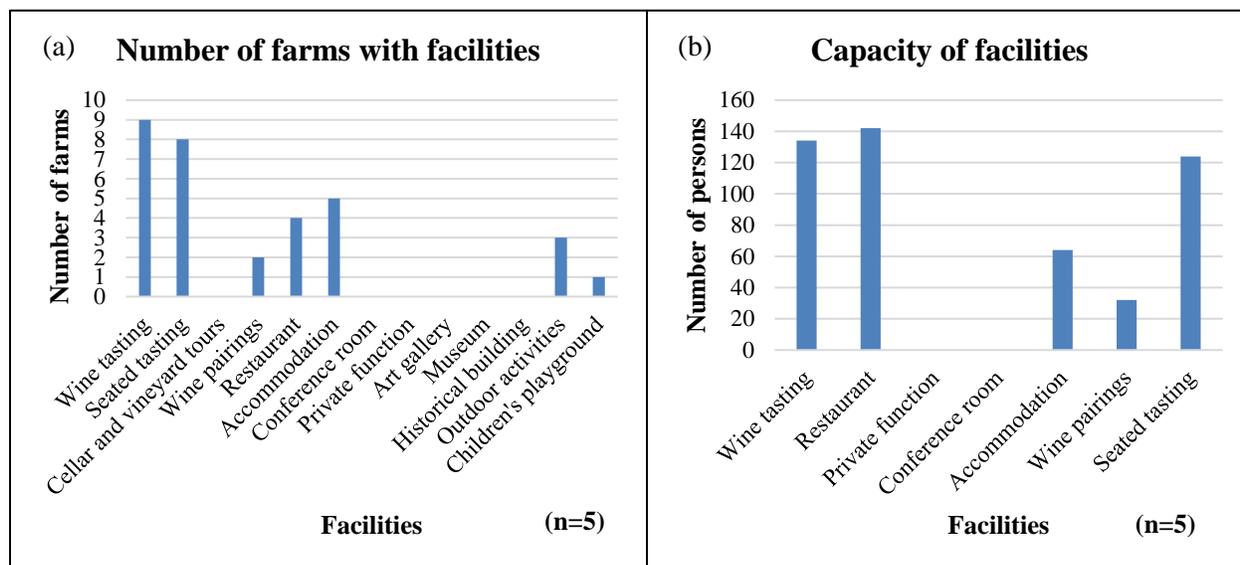


Figure 4.79 Distribution of member wineries on the Plettenberg Bay Wine Route in the Klein Karoo Region.

Figure 4.80a suggests that the wine route is in an early stage of development regarding tourist superstructure, but does offer good numbers of wine tastings (nine), seated tastings (eight), restaurants (four), accommodation facilities (five) and outdoor activities (three). Cellar and vineyard tours,

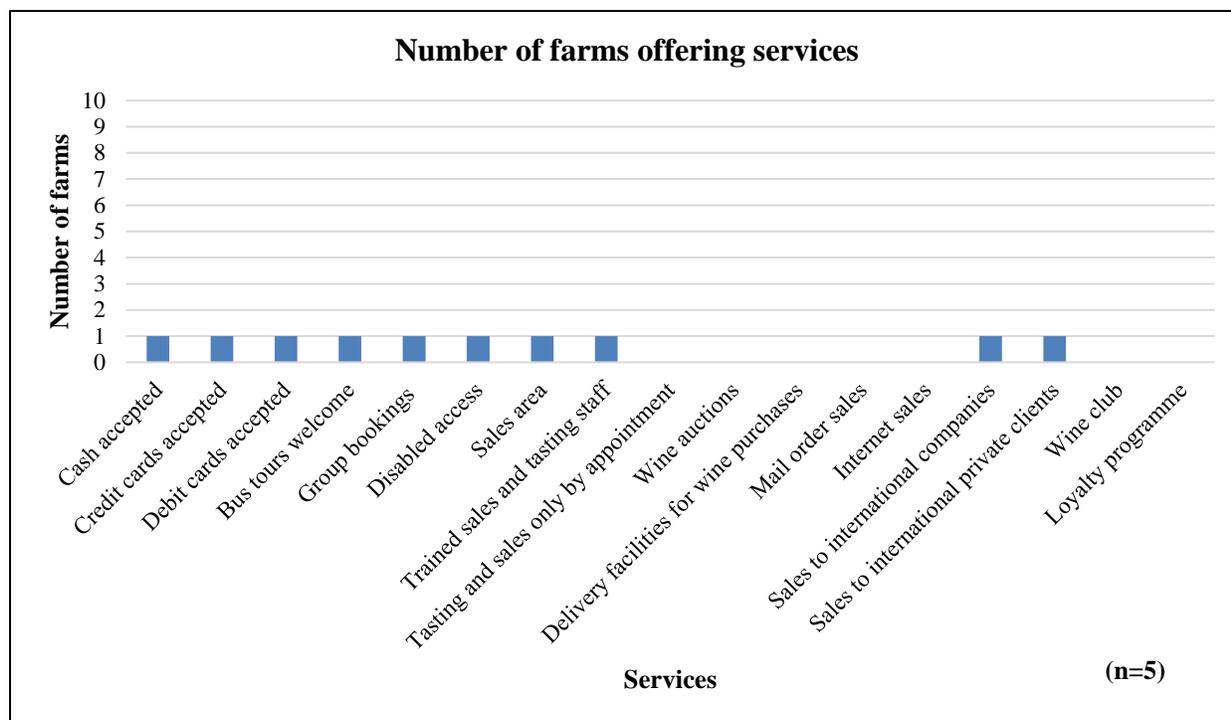
conference rooms, private function venues, art galleries, museums or historical buildings are not yet offered. Regarding capacity (Figure 4.80b) the participant route members can only accommodate a maximum of 134 for wine tastings (with a capacity range between ten and 40 people), 142 in the restaurants and eateries (with a capacity range between 12 and 100), 64 for overnight stays (with a capacity range between four and 20) and 124 in seated tastings (with a capacity range between 10 and 40). The restaurants and eateries include cafés, bistro's and coffee shops. The overnight stay facilities comprise a manor house and self-catering establishments.



Source: Wine farm questionnaire survey

Figure 4.80 Plettenberg bay Wine Route: Number of farms with facilities and capacity of facilities

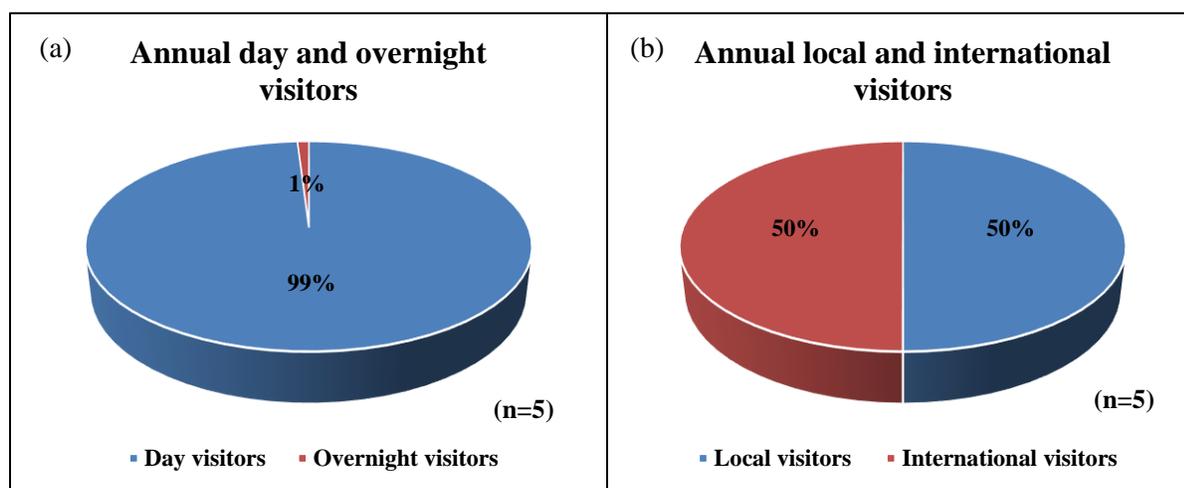
Figure 4.81 shows that only ten of the 17 services are offered by the only one wine route member and that no members offer tastings by appointment, wine auctions, delivery facilities, mail order sales, Internet sales, a wine club or loyalty programmes. Thus, there are vast room for improvement and development in terms of services offered on the farms of the route members.



Source: Wine farm questionnaire survey

Figure 4.81 Plettenberg Bay Wine Route: Number of wine route members offering services

Figure 4.82a shows that 99% of the tourists are day visitors split equally between local and international visitors (Figure 4.82b). Annual visitor numbers (local and international) to the route are 100 000. Local visitors travel from Cape Town, Johannesburg and surrounding areas while international visitors travel from Germany, the United Kingdom and the USA. Local and international visitors spend an average of R400 each per day on a trip to the route.



Source: Wine farm questionnaire survey

Figure 4.82 Plettenberg Bay Wine Route: Visitor origins and stays

This route has great potential given the large number of annual visitors. It is expected that more tourist superstructures, services and facilities will be developed and capacities increased. The development scores of the Plettenberg Bay Wine Route shows that Bramon Wine Estate had the highest score (33), followed by Newstead (18), Kay and Monty Vineyards (16), Packwood Wine Estate (15) and Anderson Wines (8). Hermanus Wine Route follows.

4.2.3.17 Klein Karoo Wine Route: Not so small after all

Location, historical and tourism contexts

The Klein or Little Karoo in the Western Cape is an extended valley that lies between the Swartberg and Langeberg ranges. As its name suggests, this area is the smaller sibling of the Great Karoo to its north. The Klein Karoo Wine Route lies in a flat semi-arid basin, with the great walls of the Langeberge, Outeniqua and Groot Swartberg surrounding the area. It stretches from a rugged stone coronet that wraps around Montagu in the west all the way to Barrydale, Calitzdorp, Oudtshoorn and De Rust near Meiringspoort in the east (Klein Karoo Wines 2016).

The Klein Karoo Wine Route is situated in the heart of the Western Cape region. The Klein Karoo is the easternmost wine-producing region in the country. The Klein Karoo has a wide variety of accommodation establishments and activities, and is one of the most remarkable parts of South Africa, packed between striking mountains that offer ever-changing landscapes (Klein Karoo Wines 2016). Oudtshoorn is well-known for hosting the annual National Afrikaans Arts Festival (the KKNK). This week-long multiplatform festival, features pioneering theatrical productions, concerts, children's entertainment, dance performances and visual-art installations that boost appreciation for locally relevant and produced arts and culture in post-apartheid South Africa. Oudtshoorn is synonymous with the history of ostrich farming in South Africa (Klein Karoo Wine Route 2016). At the Cango Ostrich Show Farm guests who weigh less than 75 kg can ride ostriches while others are welcome to hand-feed these curious birds. One of the most interesting natural attractions is the Cango Caves that lie in the foothills of the Swartberg about 30 km outside Oudtshoorn. This cave system was formed by rainwater eroding rock and limestone for over 20 million years. The caves' gigantic stalactites and stalagmites were proclaimed a historical monument in 1938 and it is one of the world's best known cave systems which attracts thousands of local and international visitors annually. The Cango Caves are the only show-caves in Africa that offer standard and adventure tours in English, Afrikaans, German and French (Klein Karoo Wines 2016). Another equally spectacular drive is

through Meiringspoort where the road and river wind their way through a narrow gorge presenting incomparable views of rock formations typical of the Cape fold mountains. The area also has beautiful wilderness areas, including the Gamkaskloof and Aynsberg provincial nature reserves where semi-desert flora including special succulents, and fauna like the Cape mountain leopard are found (South African Tourism 2016). The Klein Karoo offers several detours from the Garden Route that are worth exploring. History and art lovers should visit Uniondale for a tour of the town's Anglo-Boer War forts and art gallery. All these attractions and activities are good reasons to visit the area where visitors will find the locals in the small towns to be hospitable (South African Tourism 2016). Figure 4.83 shows the distribution of the wine route members.

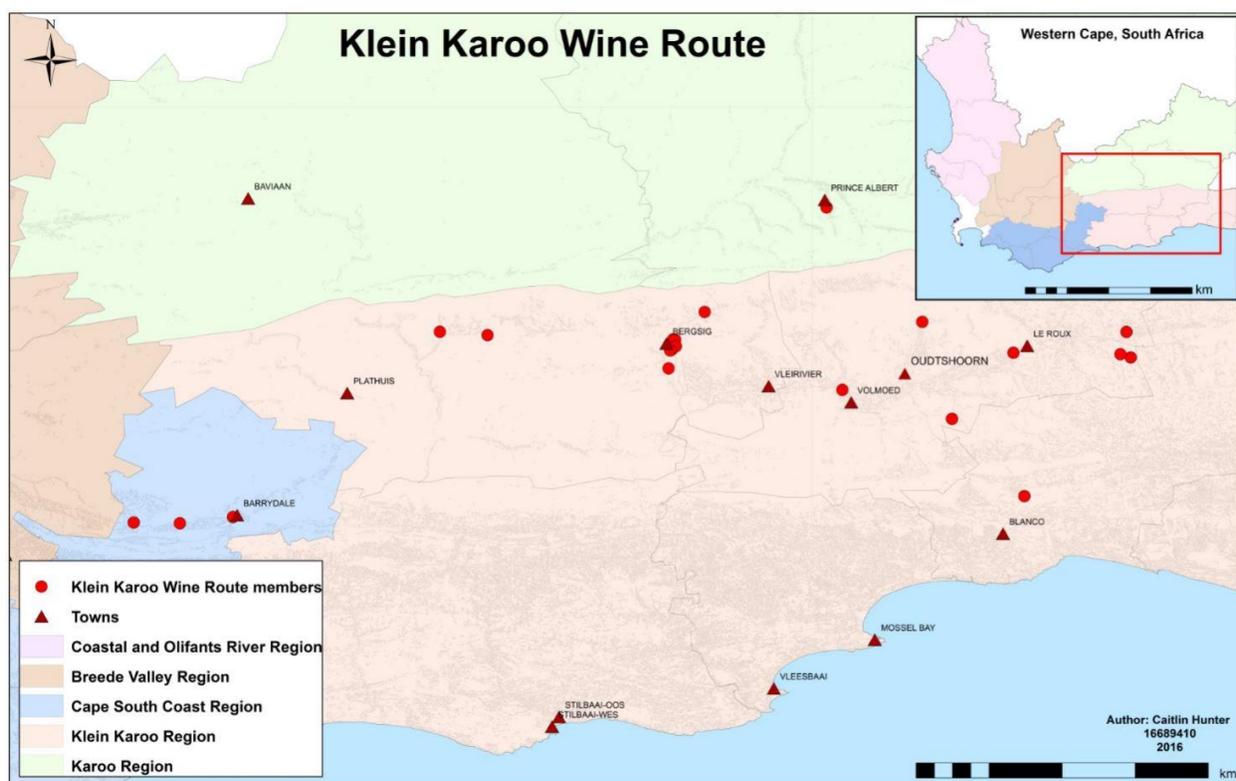


Figure 4.83 Members of the Darling Wine Route in the Coastal and Olifants River Region

There are 20 members on the Klein Karoo Wine Route and 50% of the members participated in the research. Some of South Africa's best Cape port wines (the European Union no longer allows the use the name 'port') now come from the town of Calitzdorp, 51 km west of Oudshoorn. Various microclimates enable Klein Karoo winemakers to produce a variety of quality wines, including dry wines and fortified wines, and pot-stilled brandies. World-class port and South Africa's champion Muscadel are specialties among the fortified wines produced here, along with a host of outstanding red and white wines, which vary from full-bodied Shiraz to lighter styles for easy drinking (Klein Karoo

Wine Route 2016). Dry wines produced from traditional Portuguese cultivars are unique to Calitzdorp, contributing to the sought-after Calitzdorp blend (comprising six of the traditional port varieties - Trincadeira, Tinta Barocca, Touriga Nacional, Tinta Roriz (Tempranillo), Tinta Francisca and Souzao). Today, there is a toward focus on red wines like Merlot made in an easy-drinking style. The vineyards of Herold Wines are situated on the slope of the Cradock Peak, surrounded by mountains covered in fynbos. The vineyards are planted at an altitude of 650 m to 700 m. Herold Wines offer wine tasting, light lunches and picnic facilities (Herold Wines 2016). The farm also offer comfortable self-catering units with numerous farm walking trails, mountain biking trails, fynbos footpaths and river pools. Herold Wines boasts with wines including Herold Pinot noir, Herold Sauvignon blanc, Chardonnay, Red Men (Red blend) and Gertrude (Natural sweet wines). The SoetKaroo Wine Estate only covers one hectare of land and are situated in Prince Albert. Herman and Susan Perold are the wine making team, producing dessert wine from their own grapes. SoetKaroo was also the first SAWIS registered estate in the Great Karoo. The estate offers wine tasting and vineyard and cellar tours. The area of the Karoo is the perfect conditions in order to produce fortified dessert wines. The rare Red Hanepoot (Red Muscat d'Alexandrie) is the flagship wine of this estate and presents 50% of the annual production (SoetKaroo 2016). Figure 4.84 illustrates some beautiful landscapes of the Klein Karoo.



Source: Route-62-Info (2016)

Figure 4.84 Landscape in the Klein Karoo

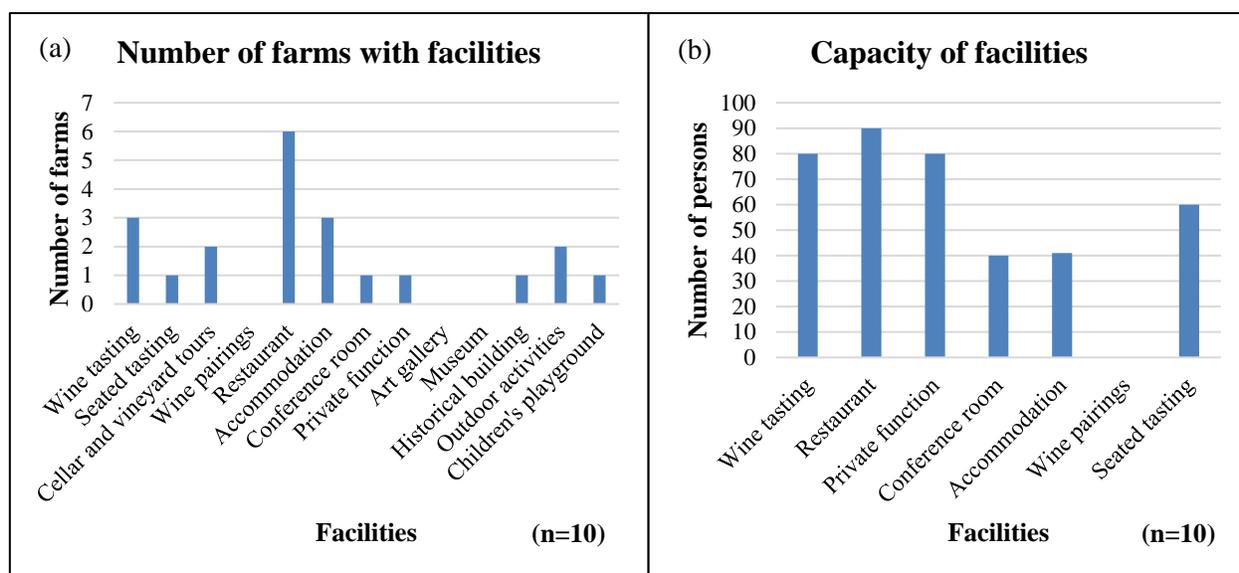
Figure 4.84 shows the beautiful landscape of the Klein Karoo with snow topped mountains.

Geographical factors for the production of quality wine grapes

This area is marked by a shortage of water due to the low and unreliable rainfall (average of 200mm annually). The drier climate results in healthy vineyards which are, to a large extent, grown organically.

Viticulture takes place as plantings in ‘finger-like’ kloofs, valleys and riverine sites in a rugged mountainous landscape (Aspect 2015). Traditionally, plantings were in valleys on alluvial soils derived from sandstone and/or shale, whereas newer plantings are on higher-lying, cooler positions on emaciated, stony soils mainly derived from shale. Muscat varieties flourish here and the area is known for its sweet wines (WOSA 2016). Vines in the southern part of this area, namely Montagu, Barrydale, and Tradouw up to Ladismith, are planted in the foothills and kloofs of the Langeberge, with its chalky, shallow soil, weathered from the surrounding sandstone mountains. This terroir, combined with a climate of hot days and cool nights, contributes to the award-winning Cabernets, Merlots and Chardonnays produced in the Klein Karoo region (Aspect 2015). The area between Ladismith and Oudtshoorn lends a specific character to the wine route in the Klein Karoo, with Calitzdorp at its heart. Here, a semi-desert environment with intense sunshine brings out the deep berry flavours needed for excellent fortified wines like Cape port (name may no longer be used) (South African Tourism 2016).

Sixty per cent of the wine farms are open for visitors and the others are open by appointment only. The majority (60%) of the wine farms and estates in the Klein Karoo are privately owned and they offer a variety of farm cottages, restaurants and wineries to the wine visitor. Figure 4.85a shows that 60% of the participants have restaurants, 30% offer wine tasting and accommodation, 20% outdoor activities and 20% cellar and vineyard tours.

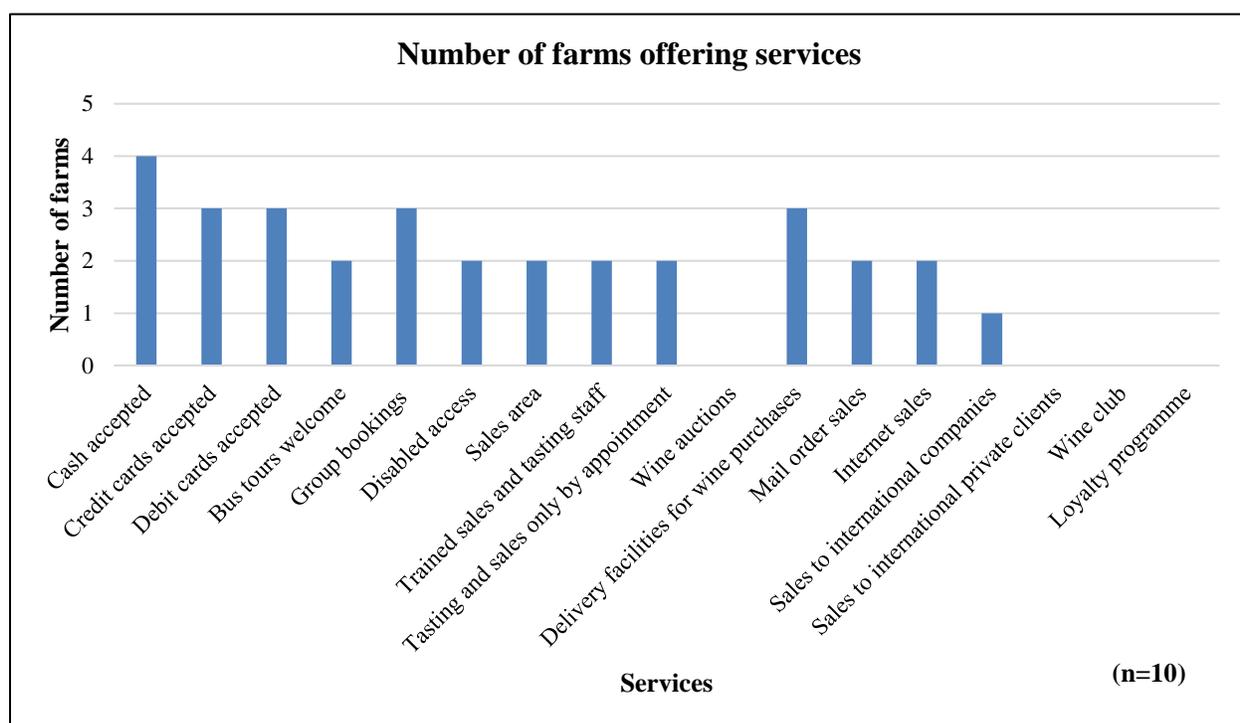


Source: Wine farm questionnaire survey

Figure 4.85 Klein Karoo Wine Route: Number of farms with facilities and capacity of facilities

Venues for wine tasting (with a capacity range between five and 60 people) and private functions can accommodate about 80 people. Ninety people can be accommodated in the restaurants (with a capacity range between 30 and 60 people) on offer by the members. There are eateries such as cafés, a bistro, a deli, coffee shops and restaurants offering breakfast, lunch and dinner on this route. Some 60 people can be accommodated at the facility for seated tastings and 41 people in total can be accommodated in the three self-catering accommodation facilities (with a capacity range between four and 25 people) (Figure 4.85b).

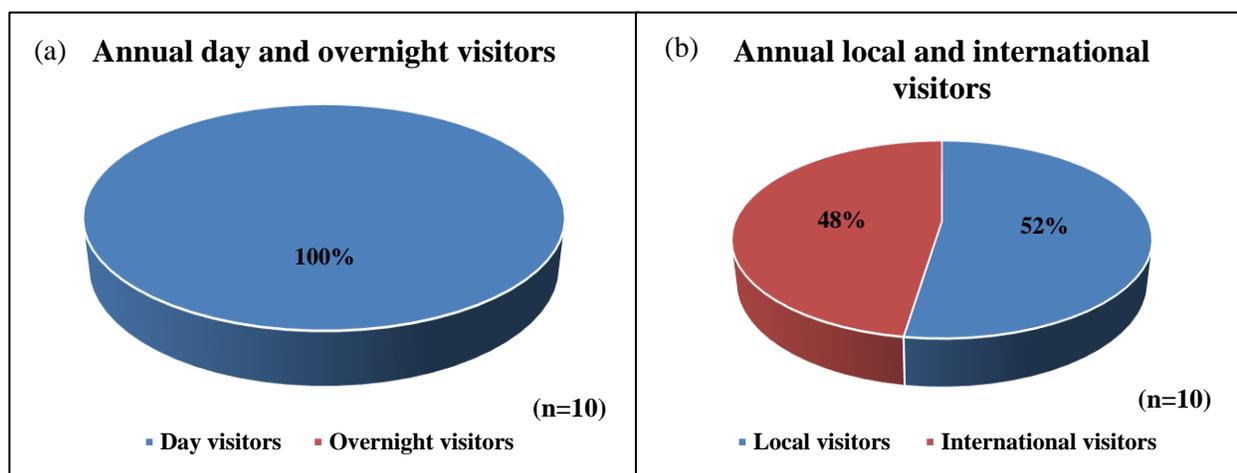
Figure 4.86 shows the types and number of services on the route. Four of the questionnaire-listed services are not offered, namely wine auctions, selling wine to international private clients, a wine club or a loyalty programme.



Source: Wine farm questionnaire survey

Figure 4.86 Klein Karoo: Number of wine route members offering services

Tourists to the Klein Karoo Wine Route are split almost equally between local (11 165) and international (10 135) visitors annually (Figure 4.87b), none of whom stayed overnight (Figure 4.87a).



Source: Wine farm questionnaire survey

Figure 4.87 Klein Karoo Wine Route: Visitor origins and stays

The Klein Karoo Wine Route members collectively has a development score of 88. Herold Wines are the most developed wine farm on this route according to the assessment framework, with a score of 45 and listed in the top 40 most developed wine farms. The other development scores ranged between one and 17, with the SoetKaroo Wine Estate, Doornkraal and De Krans scoring the lowest. Even though the Klein Karoo Wine Route members offer overnight accommodation, the majority of the visitors are day visitors. The great distance between the wine members should be taken into consideration, as overnight accommodation will ensure that visitors stay longer than one day. The Constantia and Durbanville Wine Route is discussed next because these two routes are positioned within the Cape Town Metropolitan area.

4.2.3.18 Constantia Wine Route: Cape Town's vineyard

Location, historical and tourism contexts

Constantia was granted to Governor Simon Van der Stel in 1685 as an incentive to develop its agriculture. Van der Stel most probably named it after Constantia, daughter of Commissioner Rijckloff van Goens who made the original grant (SA History 2016). Perhaps the meaning of the name (constancy) was intended in the naming because as such allegorical names were popular at the time. In 1692 Van der Stel built a simple country house without gables and with small casement windows. After his retirement in 1699 he lived at Constantia until his death in 1712, after which the estate was sold in three parts called Groot Constantia, Klein Constantia and Bergvliet (SA History 2016). The Constantia Valley is the oldest wine-growing area in Southern Africa and the source of the legendary

Constantia Valley dessert wines, which were famous throughout Europe during the 18th and 19th centuries. Constantia Valley is a destination within Cape Town (Constantia Valley 2016). Constantia Valley is a 15-minute drive from the city centre into magnificent mountain and vineyard countryside where a wide range of iconic premium wines of world-class quality are produced. The Constantia Valley is truly Cape Town's vineyard with a history of wine-making dating back to 1685 and now boasting eight award-winning wine estates. Settled beneath the Table Mountain National Park and commanding landscapes of the Constantia Mountain and Table Mountain, Constantia Valley is an ideal base when visiting Cape Town (Constantia Valley 2016). The Constantia Valley receives a steady flow of visitors throughout the year who come to enjoy a peaceful lifestyle conveniently situated close to all the major attractions of Cape Town. Constantia Valley appeals to many interests from visiting the wine estates famous for their cool-climate wines and offering an array of experiences such as year-round wine tastings, picnics, live music and festivals in the warmer months (Constantia Wine Route 2016). The mountain ranges and greenbelts offer breath-taking photographic opportunities, an adrenalin-rushing zip lining adventure, mountain biking and horse riding (South African Tourism 2016). The attraction of the Constantia Valley is showcased at The Constantia Food and Wine Festival with over 40 of the finest wines and delicious food from award-winning restaurants. Over the last six years the Constantia Fresh Festival has become one of the most prestigious outdoor wine events in South Africa, showcasing the Constantia Route members, 40 of South Africa's top wine producers and hand-picked local chefs from the valley.

The Groot Constantia trademark is one of the oldest surviving in the world (South African Tourism 2016). It is testimony to continuous high-quality wine production for which medals and awards have been won since 1855; some 66 gold medals over the last ten years, many of which at foreign wine shows. The gold medals were awarded for various varieties so attesting to the property's versatility and ability to produce high-quality wine across the varietal spectrum (Platter 2016). Eagles's Nest is a family owned farm, established in 1836 when the farm was used as a refreshment station for travellers who had to cross the mountain pass (now known as Constantia Neck). Eagle's Nest mainly plant Shiraz, Merlot and Viognier as the soils best suit these varieties. Visitors are able to taste their wines at the tasting room, open daily with various food pairings (Eagles Nest 2016). Figure 4.88 illustrates the winescape along the Constantia Wine Route.



Source: Cape Town ETC (2016)

Figure 4.88 Winescape along the Constantia Wine Route

Figure 4.88 shows the scenic vineyards of the Groot Constantia wine farm on the Constantia Wine Route.

Geographical factors for the production of quality wine grapes

The vines in Constantia Valley benefit from a mild maritime climate with cool sea breezes blowing in from False Bay, which is some five to 10 km away (Aspect 2015). The ward receives an average of 1000 mm of rain annually, making irrigation unnecessary. The mean February temperature of 20.6°C. The deep, predominantly yellow-brown and reddish-brown, well-drained soils are mainly derived from granite, which forms the base of the sandstone that constitutes the upper formations of the mountains. The wines, highly esteemed by wine connoisseurs, are made from classic European noble varieties (Sauvignon Blanc, Semillon, Chardonnay, Merlot, Cabernet Sauvignon, Cabernet Franc and Shiraz). The tradition of producing luscious sweet Constantia wines was revived in 1986 to worldwide acclaim (Aspect 2015; South African Tourism 2016).

Sixty-six per cent of the wine estates on the route are privately owned, the others are company owned and one is a non-profit company. All the wine estates on the Constantia Wine Route are open to the public and they operate during the week and on weekends. Seventy-five per cent of the eight wine

estates on the route participated in the survey. The location wineries in the Constantia Wine Route is illustrated in Figure 4.89.

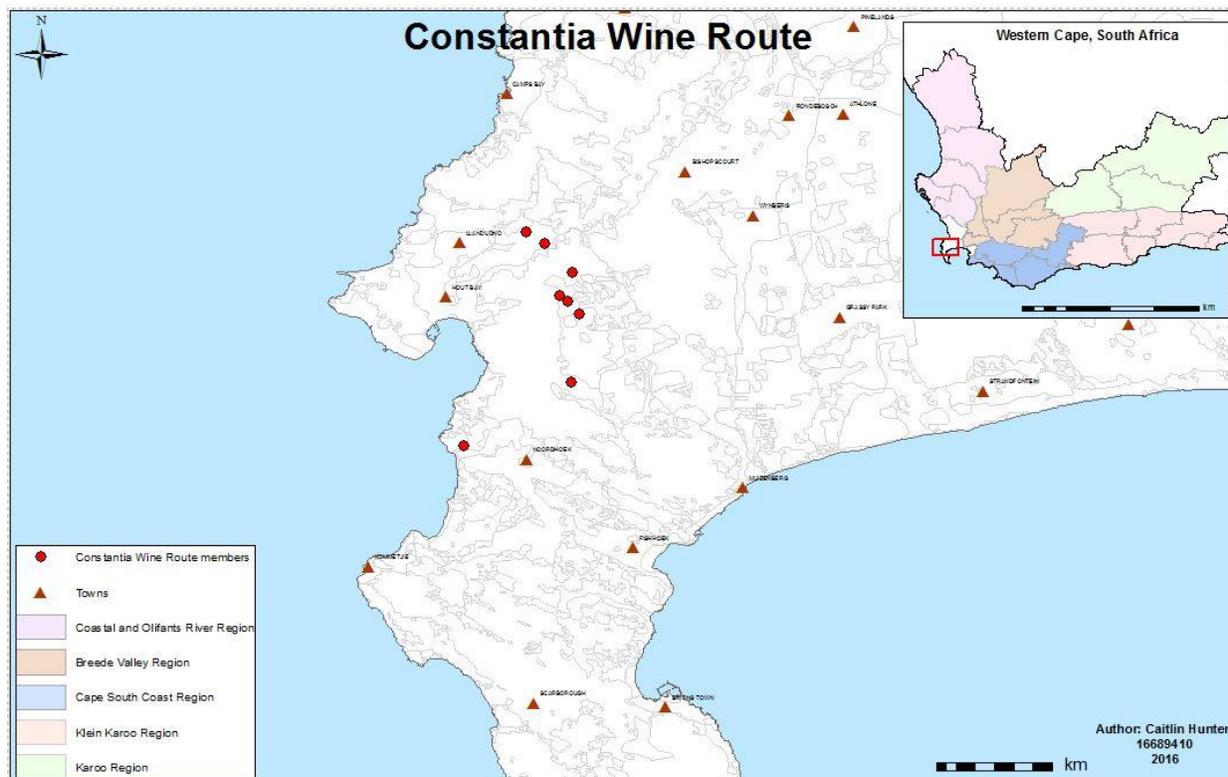
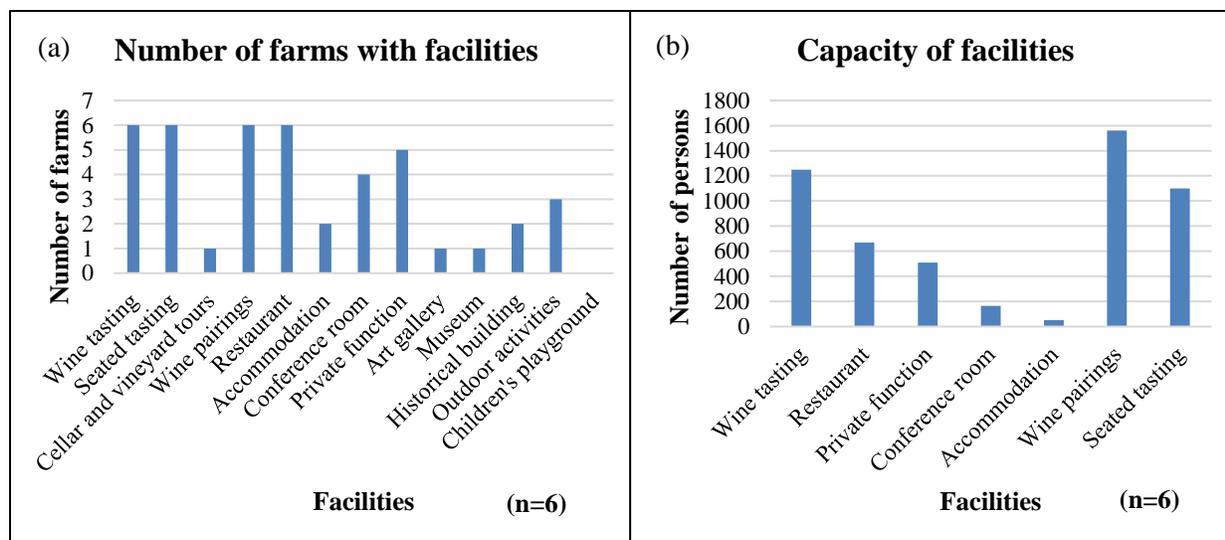


Figure 4.89 The distribution of member wineries in the Constantia Wine Route in the Cape Peninsula

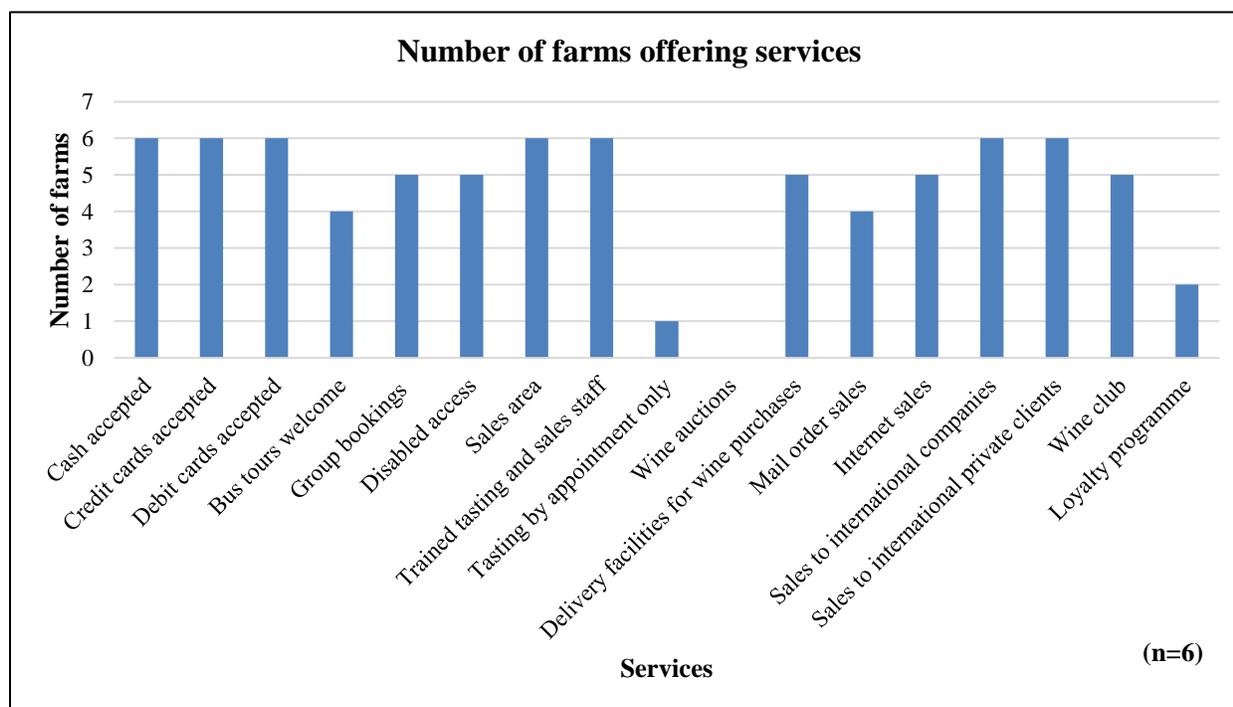
Figure 4.90a, illustrates the number of certain facilities available on the route. Facilities offered by 50% or more of the farms are wine tasting, seated tastings, wine pairings, restaurants, private function venues, conference rooms, and outdoor activities. The mountains around the valley are ideal places for outdoor activities in the region. The capacities of the route's facilities exceed those of the wine routes discussed so far. Figure 4.90b shows that for wine tasting the route can accommodate over 1200 people (with a capacity range between 40 and 540 people), more than 600 people in the restaurants (with a capacity range between 80 and 400 people) where breakfast, lunch, dinner and platters are served. Private function venues can accommodate 510 people (ranging between 30 and 150 people) and nearly 1600 for wine pairings (ranging between 60 and 350 people). Surprisingly, only about 50 guests can be accommodated on overnight stays in a manor house and a hotel cum spa (with a capacity range between 20 and 30).



Source: Wine farm questionnaire survey

Figure 4.90 Constantia Wine Route: Number of farms with facilities and capacity of facilities

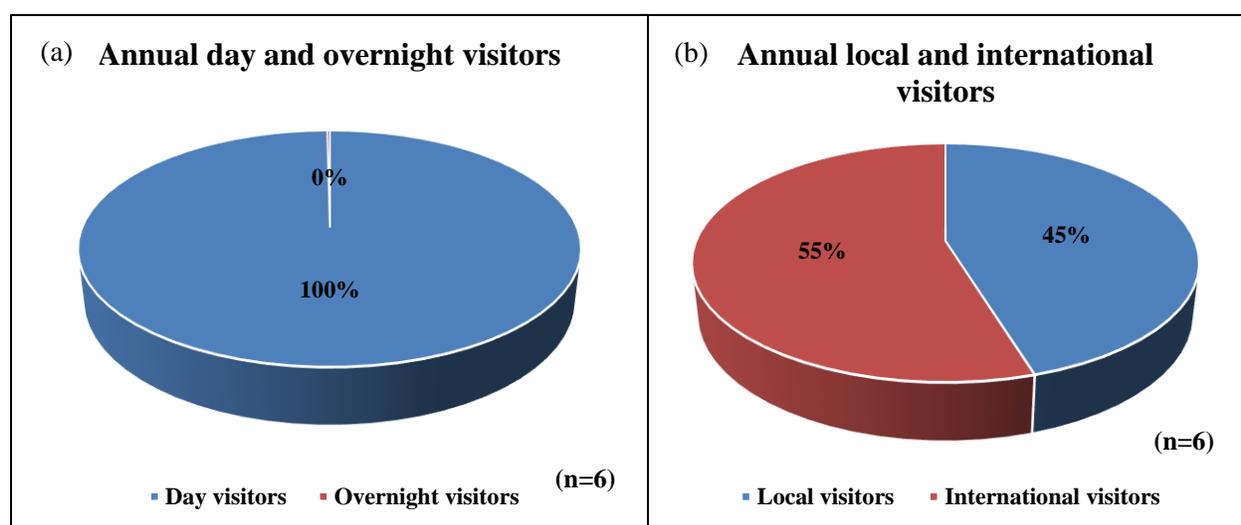
Regarding the services available at the participating members, all six member farms provide seven services; five services by 83% of the members; and two services by 67% of the members. Only one farm has tasting by appointment, two have loyalty programmes and none has a wine auction (Figure 4.91).



Source: Wine farm questionnaire survey

Figure 4.91 Constantia Wine Route: Number of wine route members offering services

It is significant that the Constantia Wine Route is the only route discussed thus far where members reported receiving mostly (55%) international visitors (Figure 4.92b). This is an indication of the popularity and prestige of the route among international visitors. This probably owes much to the position of the Constantia Valley in Cape Town, the city visited by most international tourists. Almost all the visitors are day trippers (Figure 4.92a). One can relate this to the lack of accommodation on the route given that international visitors quite likely stay overnight elsewhere in Cape Town and locals live within easy reach of the route. The international visitors come from the United Kingdom, Germany and the United States and spend up to R500 each per day. The local visitors spend up to R1000 each per day, travelling mostly from areas in and around Cape Town.



Source: Wine farm questionnaire survey

Figure 4.92 Constantia Wine Route: Visitor origins and stays

The Constantia Wine Route is member wise one of the smallest wine routes in South Africa. Nonetheless, this niche wine route attracts and accommodates more visitors relative to its size than most other wine routes in South Africa, attracting mostly (55%) international visitors. The development scores from the participating members ranges between 30 (Eagle's Nest) and 64 (Groot Constantia), which is a great indicator of the level of development on the route in terms of tourist infrastructure, services and facilities, catering to large numbers of visitors and international tourists staying overnight in Cape Town.

4.2.3.19 Durbanville Wine Route: The vineyard hills

Location, historical and tourism contexts

In 1825 a group of Tygerberg farmers were given permission by Lord Charles Somerset (the district governor) to build a Dutch Reformed Church which was subsequently inaugurated in 1826. A small village (Pampoenkraal) grew between the church and the outspan and now known as Durbanville after a long process of naming and renaming (South African Tourism 2016). Thus, in 1836 the inhabitants of Pampoenkraal petitioned the Governor, Sir Benjamin D'Urban to rename the village D'Urban, its name persisted until 1886 when it was renamed Durbanville to prevent confusion with Durban in KwaZulu-Natal. A village management board was established in 1897 and a municipality in 1901 (History of Durbanville 2016). In 2004 the Durbanville Wine Route was established although some families on this wine route had been making wine for six generations. Durbanville is a ward of the Tygerberg wine district and was awarded Wine of Origin status in 1989 (Durbanville Wine Route 2016). Located 20 minutes by car from central Cape Town, the Durbanville Wine Valley is often overlooked due to the renown of the Stellenbosch and the Constantia winelands on its doorstep. Nevertheless, Durbanville in Cape Town's northern suburbs attracts visitors with unsurpassed views of Table Mountain while tasting wine, picnicking and exploring the beautiful outdoors (South African Tourism 2016). Other tourist activities in the Durbanville area are visits to Little Pink Chef (exciting cooking classes), Rust-en-Vrede Gallery, Galileo Open Air Cinema, Palapai (massages), birdwatching, enjoying a day at the spa (Pure Day Spa, Greenhouse Spa), horse riding at the Fat Pony Riding Centre, eating Mediterranean food at the Koko Restaurant, undertaking microlight scenic flights, visiting the Reptile Garden and enjoying shows at the Barnyard Theatre (Durbanville Wine Valley 2016). The Durbanville area produces marvellous Chardonnay, Cabernet Sauvignon and Merlot. Each wine farm on the route has distinctive charm and country elegance.

D'Aria Vineyards includes two wine farms, namely Doordekraal and Springfield. The vineyards are situated at the back of the Tygerberg Hills and is situated 10 km from the Atlantic Ocean. D'Aria's wine range was launched in 2008 and has since achieved numerous awards (Old Mutual Trophy Wine Show and Michelangelo). The winery has a range of red, white, rosé, dessert wines and brandy. Visitors are able to join the wine club at D'Aria in order to have the opportunity to access the wines directly at the winery. Furthermore, wines can be ordered from their website (D'Aria Winery 2016). Russo wines is a family-owned winery run by Henk and Terèsa Rossouw, focused on producing Bordeaux-style blends. The vineyard is only about 4 hectares and worked mainly by hand. The wine varieties include

Cabernet Franc, Cabernet Sauvignon, Pinot Verdot, Malbec and Merlot. The winery is not open for the public, but appointments can be arranged (Russo Wines 2016).

Viognier and Cabernet Franc are recent introductions to the route. Durbanville is known for its Sauvignon Blanc and an annual festival called Season of Sauvignon celebrates the start of spring (Durbanville Wine Route 2016). Diemersdal and De Grendel have long been producing excellent Sauvignons but Bloemendal and Ntida have taken top honors in 2016, being awarded the prestigious 5-star by the Platter wine guide for their Sauvignon-Semillion blends. De Grendel is renowned for its Methode Cap Classique, Hillcrest for Merlot, D’Aria for Shiraz, Altydgedacht for Barberra, Diemersdal for Cabernet Sauvignon and Meerendal for Pinotage. The Feast of the Grape in February each year welcomes the wine harvest. Festival-goers can enjoy summer days with family and friends while drinking exceptional wines eating local cuisine and experiencing grape stomping, tutored tastings and live music. The start of winter is celebrated in Durbanville Valley with unique wines, soups, artisan breads, winter-inspired culinary treats, live music and special dining experiences during Soup Sip and Bread at the beginning of June. Sauvignon Blanc is the noble and celebrated grape varietal in Durbanville. Each year, Season of Sauvignon recognises the outstanding quality of Sauvignon Blanc produced in the Valley (Durbanville Wine Route 2016). Two Durbanville landscapes are shown in Figure 4.93.



Source: Come with us (2016)

Figure 4.93 View from Durbanville Hills on the Durbanville Wine Route

The spectacular view of Table Mountain and Table Bay is shown in Figure 4.93 from the Durbanville Hills wine farm.

Geographical factors for the production of quality wine grapes

The Durbanville ward is characterised by a south-north-running range of hills known as Tygerberg (Aspect 2015). Vineyards are mainly situated on the eastern slopes at altitudes of 100-300 m. Soils are derived from greywacke and phyllitic shales, and they are mainly reddish-brown, deep and well drained. These soils are not acid, unlike the typical Western Cape highly weathered soils and they have a good water-holding capacity (Aspect 2015). This makes dryland production possible, even with an average annual rainfall of only 481mm on the eastern slopes and less on the western slopes. Although the mean February temperature is 22.8°C, the duration of high temperatures during the day is short due to cooling by prevailing summer sea breezes from False Bay which usually take effect at midday. In the early evening, mists roll in from the sea. Temperature variations of up to 5°C can occur in adjoining vineyards where the one vineyard benefits directly from these maritime conditions and the other, situated behind the hill, does not (South African Tourism 2016). The route has 12 members, with 92% participation in the research. Sixty-three per cent of the wine farms are privately owned. The Durbanville Wine Route members are all open to the public during weekdays and on weekends. Figure 4.94 shows the distribution of the route's member wineries.

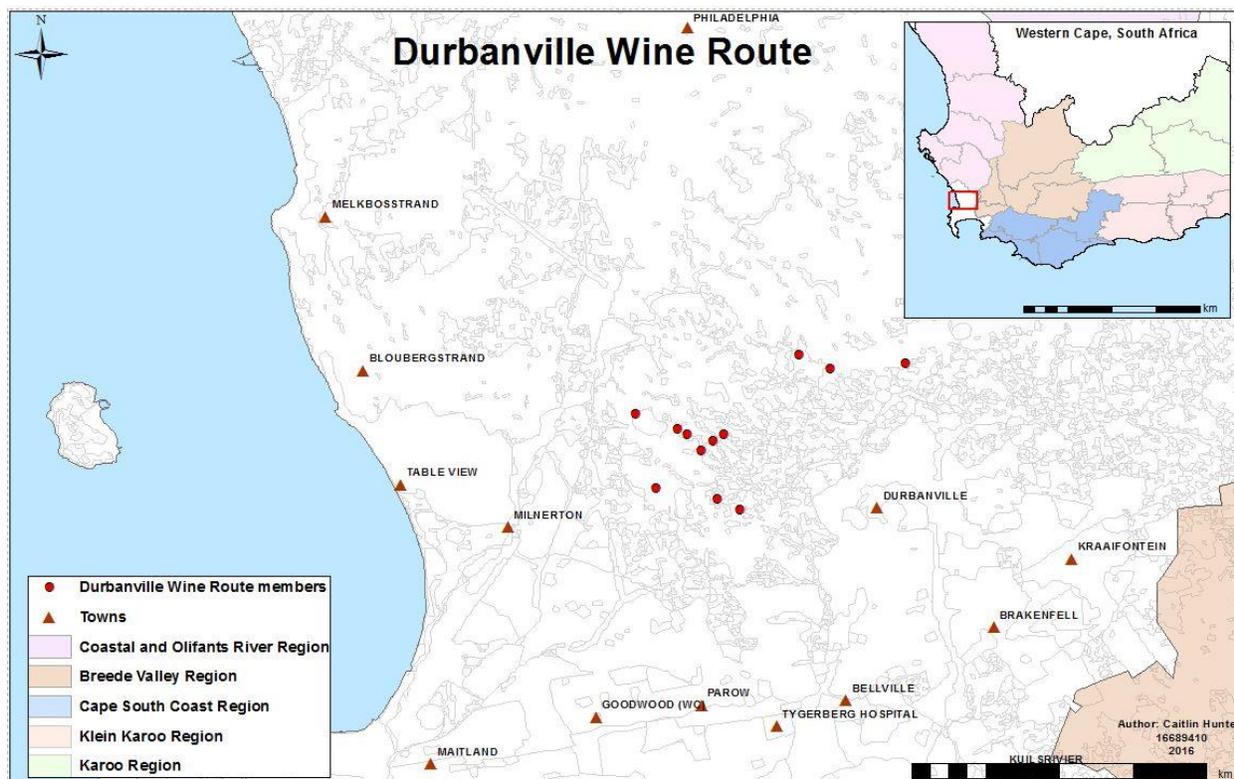
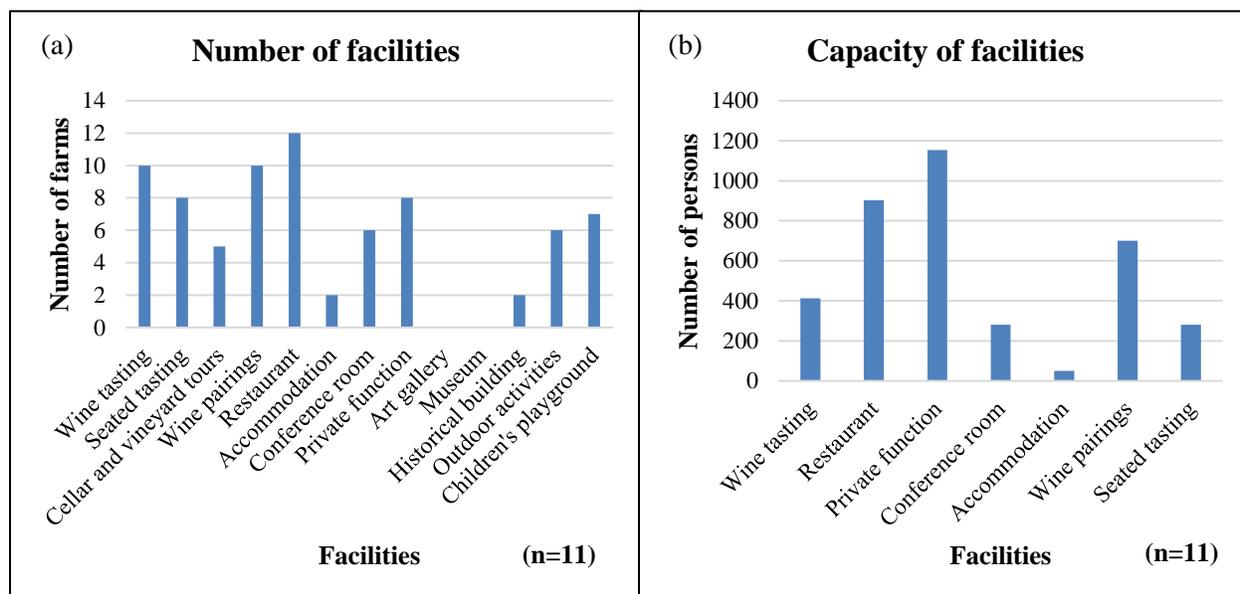


Figure 4.94 Distribution of member wineries in the Durbanville Wine Route in the Cape Town Metropolitan area

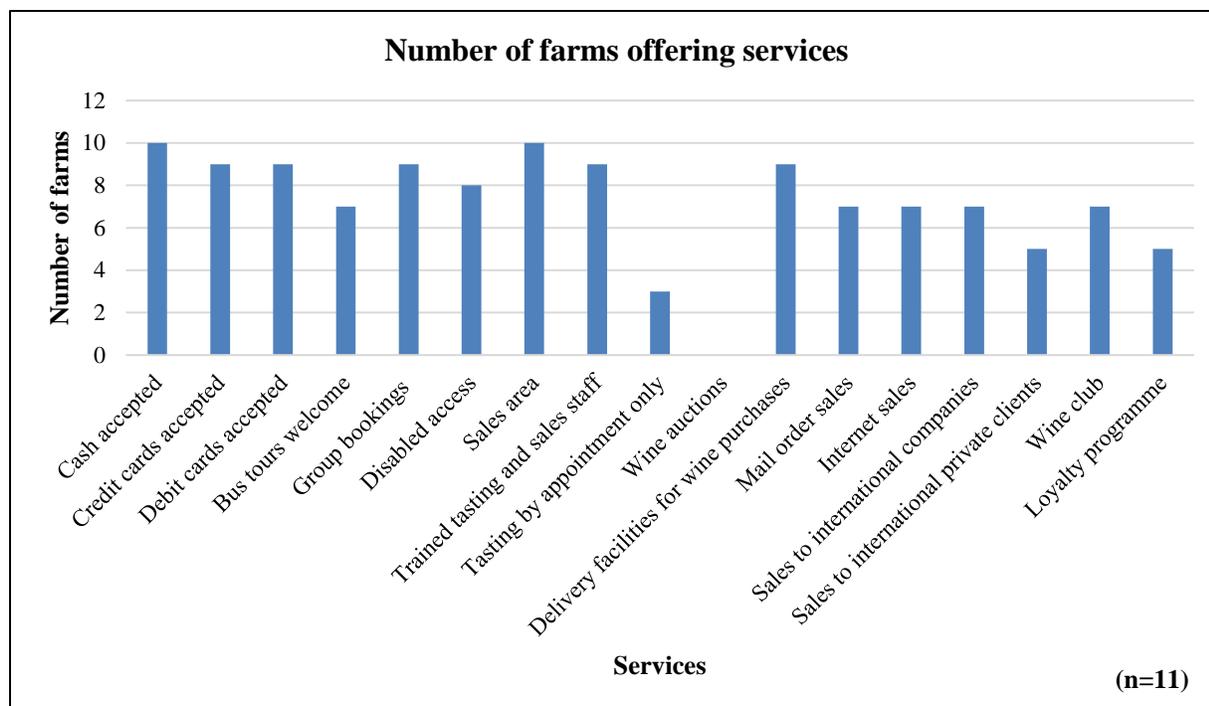
Figure 4.95a reveals that the majority of the wine route members offer wine tasting, wine pairings, seated tastings, restaurants and private function venues. The restaurants comprise bistro’s, cafés and coffee shops, and they cater for breakfasts, lunch and dinner. Some wine farms offer platters. The accommodation provided are self-catering chalets and a hotel and spa. Concerning the capacity of the facilities, 1153 people can be catered for in private function venues (with capacity ranges between 10 and 300 people) on the Durbanville Wine Route, about 900 seated in the restaurants (ranging between 8 and 250) and 400 people in wine-tasting rooms (ranging between 12 and 80 people). However, only 50 people can stay overnight on the route, with a capacity range between 2 and 48 (Figure 4.95b).



Source: Wine farm questionnaire survey

Figure 4.95 Durbanville Wine Route: Number of farms with facilities and capacity of facilities

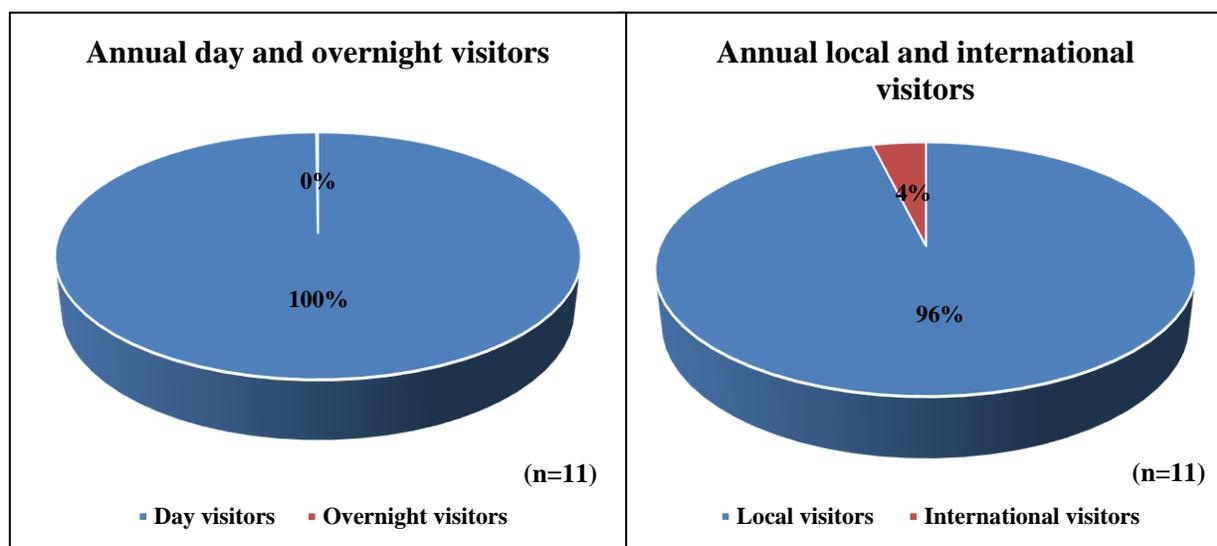
More than 60% of the participant farms each offer 13 of the 17 listed services. No members do wine auctions and few do tastings by appointment only (Figure 4.96).



Source: Wine farm questionnaire survey

Figure 4.96 Durbanville Wine Route: Number of wine route members offering services

The majority (96%) of the visitors are local and only a few are international visitors (Figure 4.97b). Day visitors account for 99% (Figure 4.97a) of the visitors to the route which receives more than 700 000 visitors annually. Local visitors reside in the Durbanville area, Cape Town and Johannesburg. International visitors are from the Netherlands, United Kingdom and China, spending between R100 and R1000 per person per day. Local visitors spend up to R1000 per day per person.



Source: Wine farm questionnaire survey

Figure 4.97 Durbanville Wine Route: Visitor origins and stays

The Durbanville Wine Route is one of the most visited wine routes in the Cape Town area and particularly popular among local visitors for its restaurants, private function venues and ample services. The development scores ranged between one (Russo Wines) and 54 (D’Aria Winery). Five of the wine farms achieved a score between 46 and 54, indicating the well-developed wine farms with regards to tourist infrastructure and superstructures. Initiatives should be taken to provide more accommodation to attract international visitors, from staying overnight in other Cape Town suburbs.

4.3 CONCLUSION

The extensive discussion and analyses on 19 of South Africa’s wine routes were focused on giving context to the various tourism and wine tourism offerings by the country’s wine farms and estates. Some wine farms offer visitors the complete wine tourism package while smaller niche wineries or large co-operatives and cellars are focused on bulk production, small scale production and exports. Although not all the wine route members from the 19 wine routes participated in the wine farm questionnaire survey, one can still identify the gaps in development on each route. Almost all the wine routes offer wine tasting, but significant gaps exist in offering accommodation, function and restaurant facilities and various services. The development scores achieved by each wine farm and estate from the assessment framework assisted in separating the more and less developed wine farms and estates and ultimately the wine routes from one another. It is important to firstly give context to a wine route before analysing its tourism offering on node level. The focus of certain wine routes is different than others and are reflected in the ultimate development scores, since some wine farms focus on the production of wine and others on including wine tourism in their product and experience. The next chapter positions the wine routes according to their tourism area life cycle.

CHAPTER 5 POSITIONING WINE ROUTES IN LIFE CYCLE PHASES

5.1 INTRODUCTION

In Chapter 4 the level of development of winery nodes was assessed, followed by the description of the history and geography, and analyses of the tourism and wine tourism products of 19 of South Africa's wine routes. In Chapter 5 the wine routes are positioned in their respective life cycle phases. First, the literature on life cycle phases is discussed; second, the life cycle phase of each route is identified and; third, the results of the assessment framework applied at root level are discussed.

5.2 THEORETICAL CONTEXT OF LIFE CYCLE PHASES

The literature on destination and product life cycles (Gilbert 1939; Christaller 1963; Butler 1980; Dodd & Beverland 2001) provides the foundation for determining the life cycle phase of each wine route. Gilbert (1939) and Christaller (1963) introduced the concept of a three-stage model, namely discovery stage, followed by growth and finally a declining stage. Butler (1980) expanded this three-stage model into a product life cycle model involving six stages (exploration, involvement, development, consolidation, stagnation, decline, rejuvenation). More recently, Dodd & Beverland (2001) designed a model specifically positioning wineries according to their life cycle. Miossec (1977) moved the spotlight to the structural evolution of tourist regions in time and space. These models have been transformed for application in this research through a four-phase assessment framework, namely emerging, development (acknowledgement and prestige), maturity and stagnation. The next subsections examine the characteristics of each life cycle phase.

5.2.1 Phase 1: Emerging

Phase 1 in the assessment framework is styled *Emerging*. This phase describes wine routes in their early stages of involvement. Wine routes in this phase are characterised by wineries engaged in small-scale wine production (Dodd & Beverland 2001). According to the first life cycle phase identified by Butler (1980) this standing point focuses mainly on visitations to the area that encourage some wine farmers to provide basic facilities for visitors. The facilities offered are often simple, limited and centre on the 'core product' wine, thus the cellar-door sales and opportunities to taste wine (informally, sometimes even standing). Little networking with other wine farms is done during this initial phase. According to Dodd & Beverland (2001) the supply of limited hospitality services such as restaurants and accommodation is unrealised so that there is little development for overnight stays and additional

experiences other than wine tasting. Wine routes in this phase are often new in the wine tourism industry without strong customer bases and lacking facilities to accommodate increasing visitor numbers.

5.2.2 Phase 2: Development (acknowledgement and prestige)

Phase 2, *Development*, comprises two subsequent phases, *Acknowledgement* and *Prestige*. Wine routes stepping out of the *Emerging* phase and into the *Development* phase offer satisfying numbers of services and facilities on the route. Thus, wine routes can either be in the early *Acknowledgment* phase or move into a more developed phase, *Prestige*. The latter life cycle phase involves wine routes that are gaining prominence in the viewpoint of wine tourists. These routes have the potential to move into the ultimate life cycle phase, *Maturity*. According to the life cycle phases identified by Butler (1980), the development phase begins to attract the interest of outside investment into the area. During this phase clear tourism markets start to emerge and the accessibility to the area is improved. Media coverage increases as the competitive nature of the area increases. During the development phase, new and improved facilities arise as the older local facilities are either improved or replaced so that artificial facilities replace the original facilities and local participation in the area declines. Secondary and additional facilities are provided, often using imported labour, and supplementary services become necessary to support the growing tourism industry in the area (Tooman 1997). Dodd & Beverland (2001) contend that other businesses see the potential of the area and opportunities to develop facilities because of increased tourist numbers in the area.

For example, in the Napa Valley during the 1970s, numerous accommodation facilities were opened because investors saw the potential growth of the wine region. This led to visitors to change from only being day visitors to become overnight visitors in the wine regions. During this phase, new wineries are established which benefits to the surrounding areas. Miossec (1977) reported the example of a pioneer resort that facilitated the opening up an area, expanded in the area and eventually spread into the surrounding countryside. This phase sees wineries upgrading from focusing on wine tasting to diversifying their offering to include wine-related merchandise, restaurants, accommodation, entertainment facilities and food items.

5.2.3 Phase 3: Maturity

The third phase of the assessment framework is labelled *Maturity*. Wine routes that have reached this phase have become more well known as destinations. Changes and development occur at individual

wine farms level and with related businesses, so that the phase is characterised by continuous and reoccurring events. Entertainment events like festivals and concerts become more regular occurrences in the area (Dodd & Beverland 2001). Wine routes identified as being in this phase attract beverage drinkers who is not necessarily interested in tasting wine, rather they are attracted by the extra activities and festivals. Mature wine routes attract both larger and smaller groups of package tourists for whom visits to wine farms is a core theme or part of the package in addition to other attractions (Nixon 1999). This growing popularity of wine routes has the concomitant potential for increased traffic problems and increased prices. This can cause once-supportive locals to come resentful of the wine farms in the area and the local businesses that cater more for tourists than for the community. Continued growth and maturation of wine tourism in the region often causes opposition to tourists to intensify. Flood (1990) has documented the remedial actions in the 1980s of some wine farms in the Napa Valley by cutting their operating hours, declining bus tours and charging visitors for tastings because of their concern about the responses and attitudes of the residents (even tourists) to the increased popularity of the area.

In the maturity stage wineries may be in decline because of bureaucratic structures, tired brand images, declines in relative quality, increased competition or failure to retain key distribution channels. These may necessitate increased reliance on cellar-door sales and moves toward tourism strategies to drive wine sales. Opposition to wine tourism among local communities may effectively deny wineries their lifelines forcing them to develop new products, brands and markets to revitalise their operations (Dodd & Beverland 2001). On the other hand, an area may experience wide-ranging growth and development as more businesses see the potential of the area, thus leading to large-scale regional development. Such development can create positive images of areas, or in this case the wine routes ultimately attracting more people to the wide variety of new facilities and activities catering for the needs of all types of visitors (Dodd & Beverland 2001).

Although Butler's (1980) TALC model does not recognise a transition from development to maturity, the model's consolidation phase is applicable to the maturity phase as it is the start of the critical range of capacity. During consolidation a major part of the local economy is dependent on tourism. Thus, marketing efforts and initiatives are expanded to extend the tourism season and to attract distant and international visitors. The older facilities have become inadequate and undesirable spurring need to develop new facilities (Butler 1980).

5.2.4 Phase 4: Stagnation

This section takes brief look at the characteristics of the last phase because none of the wine routes has reached this point yet were identified in this phase. Should data be collected over an extended period, this phase would be easier to identify, as signs of decline will be evident. Butler's (1980) TALC model is the only model that distinguishes a *Stagnation* phase before decline. *Consolidation* is characterised by exceeded capacity levels that result in social, economic and environmental complications. When ultimate numbers of possible visitations are reached, facility managers are forced to depend on recurrent visitations and conventions for business. Additional artificial attractions begin to replace natural or cultural attractions so that a destination is no longer thought of as a holiday or 'fashionable' destination (Butler 1980). Concerning wine farms or wine routes, this phase is detrimental as wine farms and wine routes need to continuously keep up with the desires of visitors, offer exclusive and exciting facilities, activities and services to attract more visitors. This represents visitors being unsatisfied with the products and experiences on offer, thus resulting in fewer visitors and declining wine products and experiences. This phase is only identifiable from information and indicators accumulated over longer periods because declining results are reflections of various internal and external factors peculiar to each destination, product, wine farm and wine route. In the next section the life cycle phase of each wine route is determined from the assessment framework.

5.3 APPLICATION OF THE ASSESSMENT FRAMEWORK AT NETWORK LEVEL

Against this contextual background of each life cycle phase's defining features, each wine route can be assessed to position it in the life cycle model based on the route's total development score. The score of each winery node on a wine route was summed to give a development score for each wine route, these being used to position routes in the life cycle. Table 5.1 marshals information on the life cycle phase of each wine route, its development score, and its weight relative to the most developed wine route, the Stellenbosch Wine Routes. Figure 6.1 graphically illustrates each wine route's position in the life cycle phase model. The separation of the wine routes into four phases were based on natural breaks in the development scores. Naturally breaks formed between Stanford Wine Route and Bot River Wine Route (*Emerging* and *Acknowledgement*), Constantia Wine Route and Elgin Wine Route (*Acknowledgement* and *Prestige*) and Robertson Wine Route and Franschhoek Wine Route (*Prestige* and *Maturity*). The development score of each wine route also received a weight against the SWR. Thirty-two per cent of the wine routes received a development score under 200. Thirty-seven per cent of the wine routes received a development score between 203 and 271, while 26% of the wine routes

received a development score above 300. The SWR received a development score of more than double that of the second highest wine route (Franschhoek Wine Route), positioning this route far above the rest in terms of development. Table 5.1 also indicates that the natural break between *Emerging* and *Acknowledgement* (34) is less than the break between *Acknowledgement* and *Prestige* (57) and *Prestige* and *Maturity* (176).

Table 5.1 Scores attained by wine routes for assessing position in the life cycle model

	Life cycle phase	Wine route	Development score	Weighted against SWR
1	Emerging	Darling	33	2
2	Emerging	Klein Karoo	85	4
3	Emerging	Stanford	105	5
4	Acknowledgment	Bot River	139	7
5	Acknowledgement	Plettenberg Bay	140	7
6	Acknowledgement	Hermanus	154	8
7	Acknowledgement	Swartland	203	10
8	Acknowledgement	Worcester	209	11
9	Acknowledgement	Tulbagh	210	11
10	Acknowledgement	Breedekloof	223	11
11	Acknowledgement	Wellington	247	12
12	Acknowledgement	Namaqua West Coast	263	13
13	Acknowledgement	Constantia ¹¹	271	14
14	Prestige	Elgin	328	17
15	Prestige	Durbanville	366	19
16	Prestige	Paarl	446	23
17	Prestige	Robertson	675	34
18	Maturity	Franschhoek	851	43
19	Maturity	Stellenbosch (SWR)	1963	100

It is very important to note that this assessment framework is specific to this study and the data collected, and will not apply to all wine farms or wine routes. Several wine routes might not follow the proposed evolution of development and may even skip a few phases. Some wine farms/estates are small and desire to remain small, only selling wine to the locals or focusing predominantly on wine

¹¹ The quantitative analyses positioned the Constantia Wine Route in the *Acknowledgement* phase. However, after extensive qualitative analyses and interpretation of the quantitative results, the study suggest that this route should also be in the *Mature* phase, because of its urban location, accommodation facilities in the Cape Town centre, cultural heritage and receiving a large number of visitors annually.

production. This can reflect in the position of the wine route as a whole. It was important to go beyond the quantifiable information and explore the wine tourism qualitative experiences offered by each wine route as done in Chapter 4. Figure 5.1 illustrates the position of the respective wine routes in an identified life cycle phase.

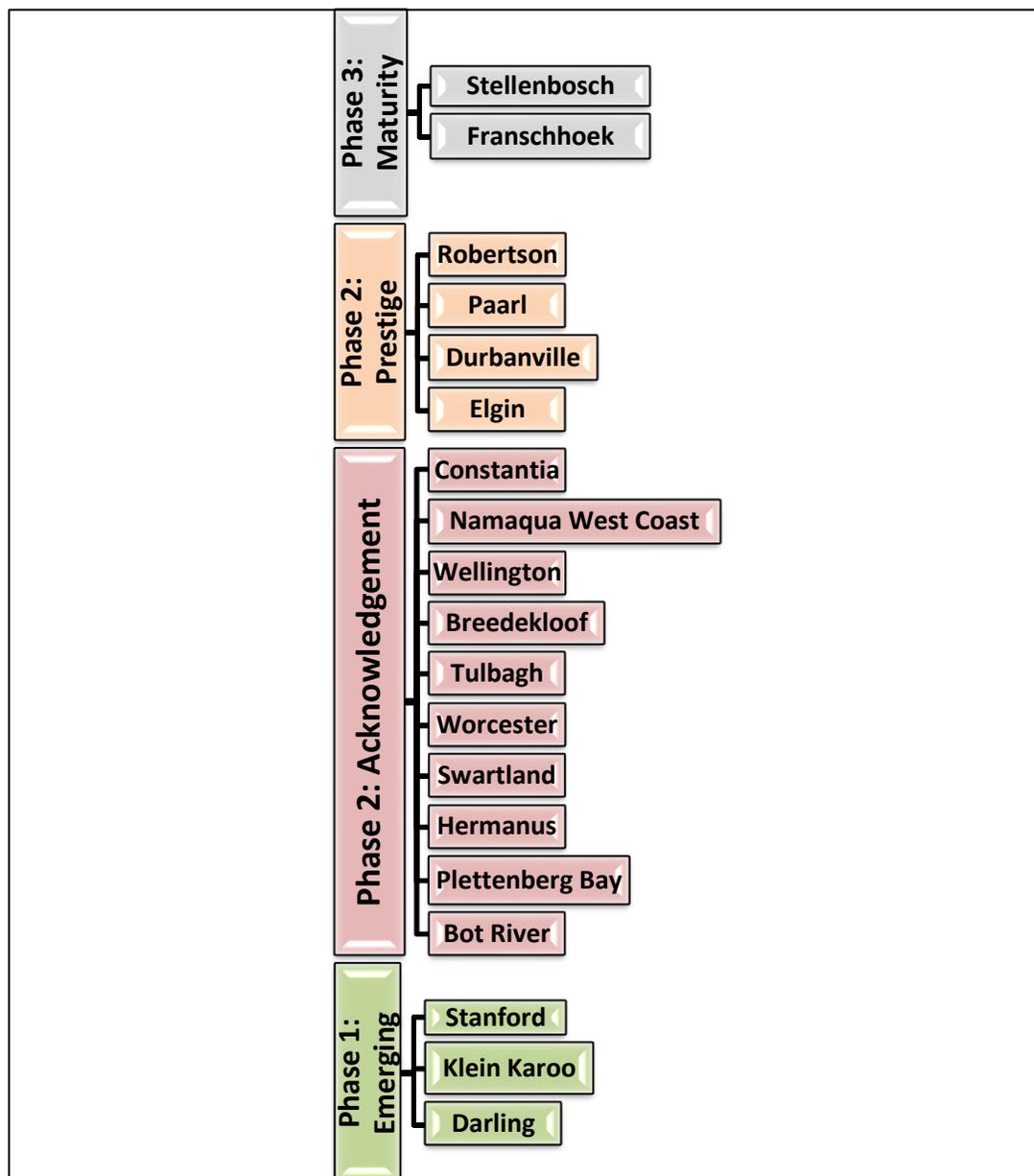


Figure 5.1 Life cycle phases of South Africa's wine routes

5.4 CONCLUSION

Chapter 4 and 5 focused specifically on discussing, analysing and interpreting the results from the wine farm questionnaire survey. Both chapters addressed objectives 2, 3, 4 and 5. Maps were compiled and illustrated the distribution of all wine-producing farms in South Africa as well as wine-producing farms involved in wine tourism activities; a national census was conducted of all wine farms and estates regarding all their tourism-related infrastructure, superstructure, products and experiences; and the clustering of the infrastructure, superstructure, products and experiences (critical mass) on South Africa's wine routes were determined in order to position each route in terms of its phase in the tourism are life cycle. The results from the assessment framework confirm that SWR is the most developed wine route regarding opportunities for wine tourism and its related infrastructure and superstructure. When the three adjacent well-developed wine routes Stellenbosch-Franschhoek-Paarl are combined, they form South Africa's premier winescape. According to Butler's (1980) and Dodd & Beverland's (2001) models, the Stellenbosch-Franschhoek-Paarl winescape is developed beyond maturity and it is the result of continuous innovation in its wine-tourism products and experiences. Attention has been directed to the level of development and life cycle phases of South Africa's winery nodes and wine routes. Now the spotlight moves to the visitors to these nodes and routes. The next chapter pays attention to the perceptions, experiences and expectations of wine tourists: What do the tourists say?

CHAPTER 6 WINE TOURISM EXPERIENCES: TOURIST PERSPECTIVES

6.1 INTRODUCTION

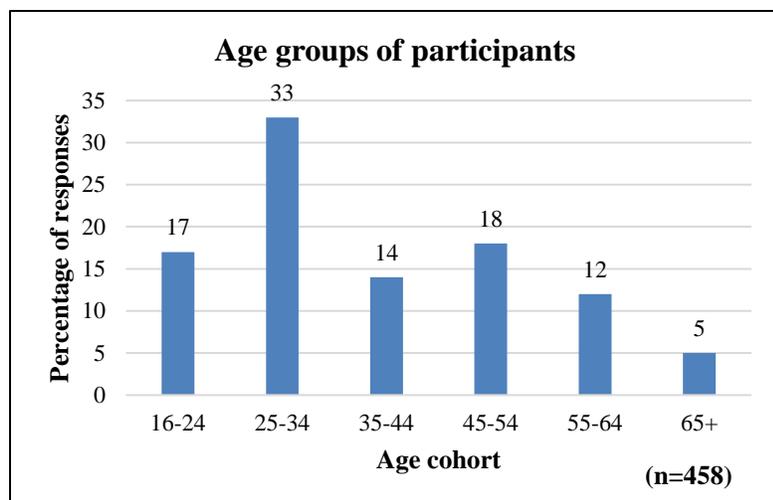
In the previous chapters the supply-side of wine tourism infrastructure, superstructure, products and experiences were discussed. In this chapter the demand-side of wine tourism is examined from the perspective of the tourist. First, the demographic profile of the tourists who participated in this study considered. Second, the tourist's preferences concerning wine tourism and wine regions are explored. Third, South Africa's wine tourism experience, as rated by the participants, is looked at. Last, the marketing initiatives are reported that made the tourists aware of the wine farms, wine regions and wine tourism experience. The chapter draws on the information acquired during the visitor questionnaire survey conducted on 21 March 2015. The 13-item questionnaires were distributed at seven points in and around Cape Town during one day of fieldwork. A total of 500 questionnaires were completed.

6.2 VISITOR PERCEPTIONS

This section first sketches the demographics (gender, age group, country of origin and duration of visit) of the participants. Second, the perceptions of the participants regarding South Africa's wine regions are discussed. Third, the participants' ratings of South Africa's wine tourism experience are reported. Lastly, the ways tourists heard about South Africa's wine tourism products and experiences are described to assess the importance of various marketing methods.

6.2.1 Demographic profile of participants

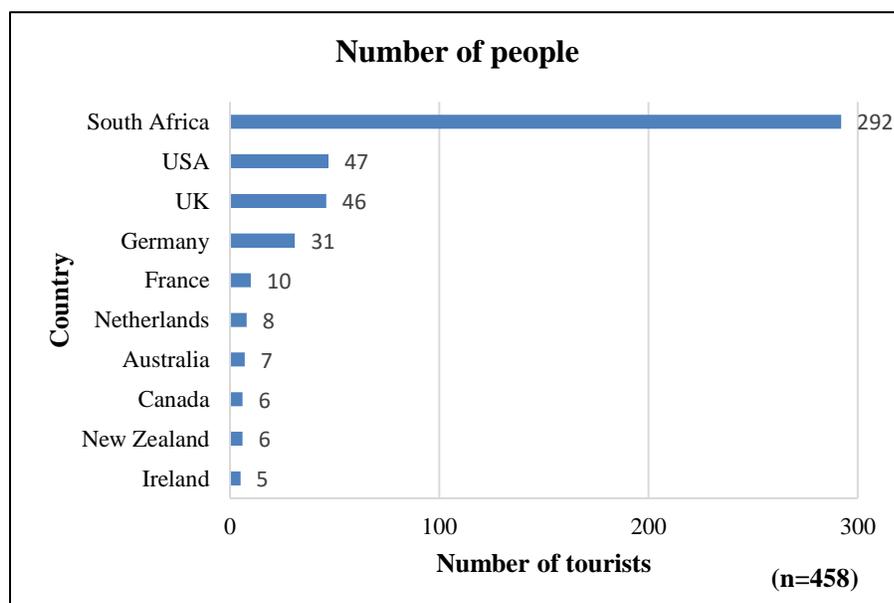
The participants were asked to indicate their age and gender group. These profiles are needed to indicate the group of tourists that are attracted by and involved in wine tourism activities. Participants were split 55% female to 45% male. Majority (51%) of the visitors were older than 34 (Figure 6.1). The gender finding supports that of other studies that claim the typical wine tourist to be female (Treloar, Hall & Mitchell 2004), although Gatti & Maroni (2004) found the typical wine tourist to be male. The finding that wine farm visitors are generally middle-aged agrees with findings reported by Folwell & Grassel (1995), Mitchell, Hall & McIntosh (2000), Treloar, Hall & Mitchell (2004) and Charters & Fountain (2006). The demographics of tourists related to a specific activity are significant as it will sketch a profile of the target market for this activity. Knowing the profile of the wine tourists can assist in advertising wine tourism experiences to the right group of people.



Source: Visitor survey

Figure 6.1 Age of participating tourists

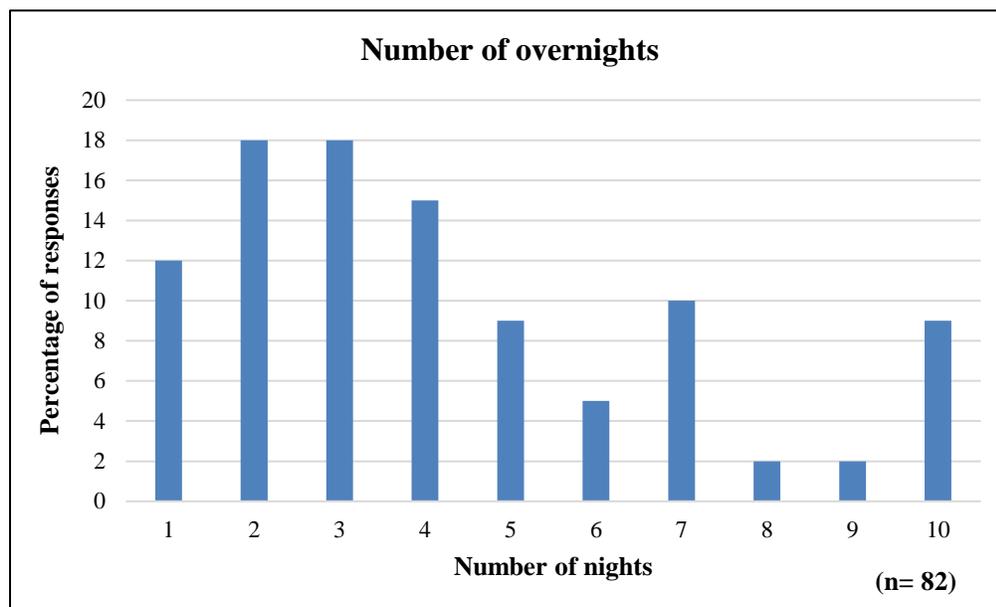
Figure 6.2 shows the top ten countries from which the participants travelled to visit the winelands. The majority (64%) of the participants are from South Africa, followed by the USA and the UK. The large domestic contingent is not surprising as other studies have shown that wine tourism generally draws on to the domestic market (Frochot 2000; Mitchell, Hall & McIntosh 2000; Triantafyllou-Pitsaki 2005; Alebaki & Iakovidou 2011). The origin of wine tourists is vital as this can aid in identifying returning wine tourists, who evidently become advocates for the wine areas they visited in a country. This information can also be helpful in exporting wine to the areas where wine tourists mostly come from.



Source: Visitor survey

Figure 6.2 Country of origin of participating tourists

There was a near equal split between day and overnight visitors to the winelands. Between two to four overnight stays were spent in the Western Cape during the visit (Figure 6.3).



Source: Visitor survey

Figure 6.3 Number of nights spent on overnight stays in the Western Cape

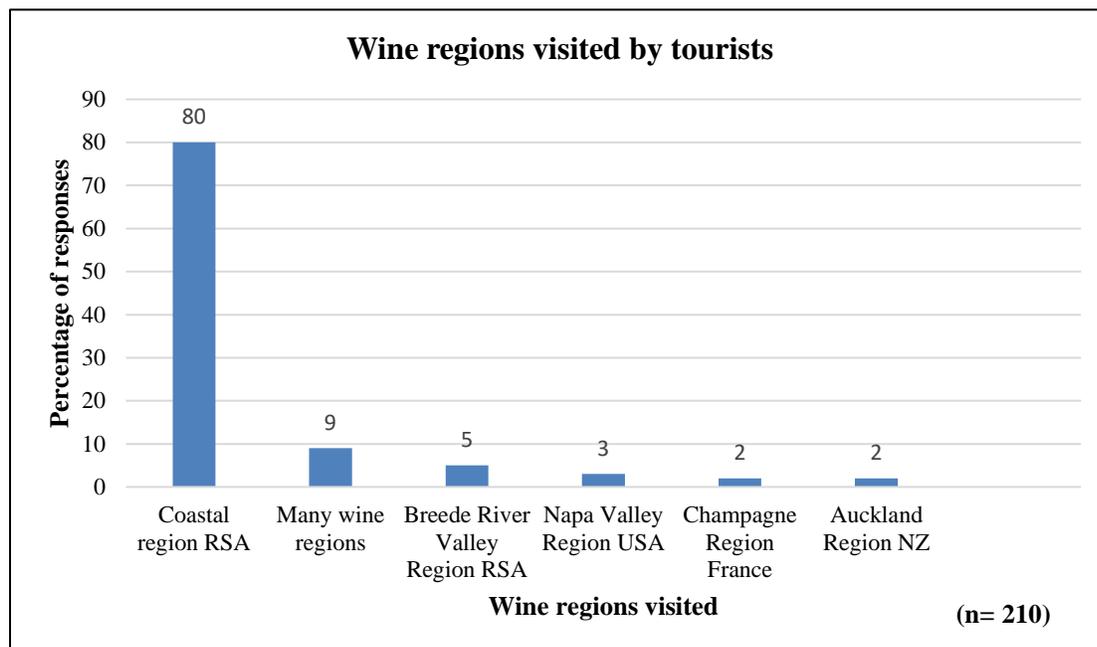
Eighteen per cent of the responses indicated that they either stay overnight for two or three nights. Overnight stays in wine producing areas can have a great economic impact on an area. Visitors are encouraged to stay longer and spend more and not only do wine related activities but activities involved in other sectors including accommodation and food.

6.2.2 Results on wine regions

This section will report on the likelihood of participants returning to previously visited wine regions and the probability of the participants arranging a holiday around wine tourism activities. Attention then turns to the participants' preferred wine regions; their perceptions of what appeals to them about wine regions and; finally, the wine tourism activities undertaken by participants during their trips to the winelands.

Knowledge of visitor desires for and preferences of wine tourism products and experiences is useful to owners, managers and promoters of wine farms and estates, wine routes and wine regions in creating brands that will attract visitors (Ben-Nun & Cohen 2008). Sixty-eight per cent of the participants had visited a specific wine region before their present visit. The percentages of responses given about the

wine regions they had visited are given in Figure 6.4. Nine per cent of the participants indicated that they have visited more than one region before.

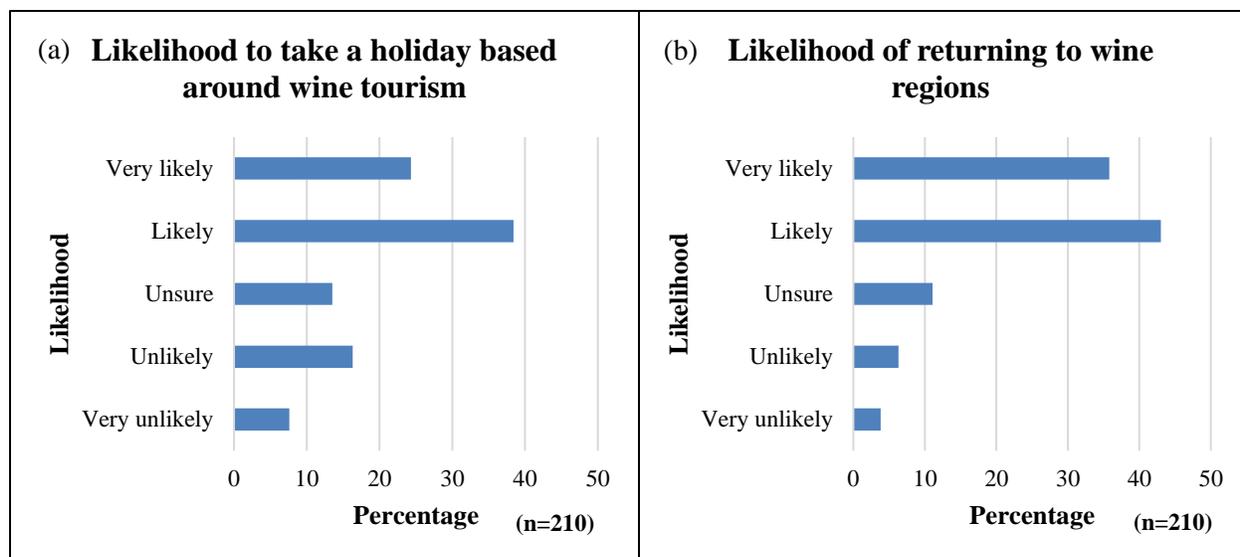


Source: Visitor survey

Figure 6.4 Wine regions visited by survey participants

The majority (80%) of the respondents indicated that they have visited the Coastal Region (Stellenbosch, Swartland, Constantia, Tulbagh, Paarl, Franschhoek and Darling wine routes) before followed by the Breede River Valley Region (5%) (Breedekloof, Worcester and Robertson wine routes) and the Napa Valley Region in the USA.

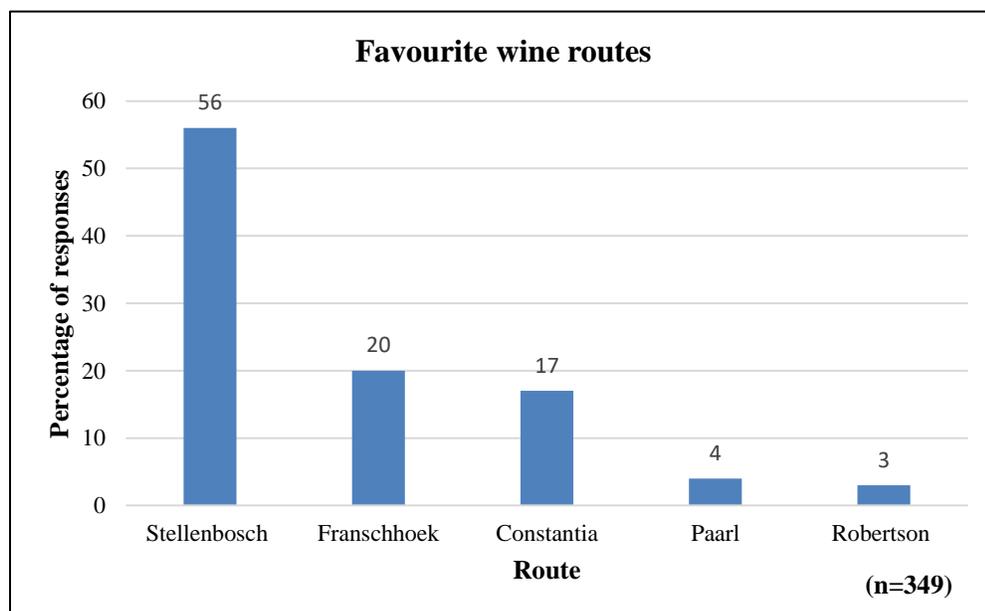
In developing a brand it is essential to know the likelihood of tourists and visitors returning to a previously visited wine region and how likely it is that tourists and visitors would take a holiday based on wine tourism activities. The answers are important for wine-related marketing experiences and exclusive products that will attract visitors to a specific wine region and increase the likelihood that they will return to the region for future visits. The majority (63%) of respondents are very likely to or likely to take a holiday arranged around wine tourism activities (Figure 6.5a) and 78% are very likely or likely to return to previously visited wine regions (Figure 6.5b). This is positive as the above figures show that visitors want to arrange their holidays based around wine tourism activities and will likely be returning wine visitors.



Source: Visitor Survey

Figure 6.5 Likelihood of arranging wine tourism holidays and returning to previously visited wine regions

Respondents were asked which South African wine region is their favourite. Most of the respondents interpreted the question to relate to *wine routes*. SWR is by far (56%) their favourite wine route, followed by Franschhoek (20%) and Constantia (17%). Figure 6.6 illustrates the results.



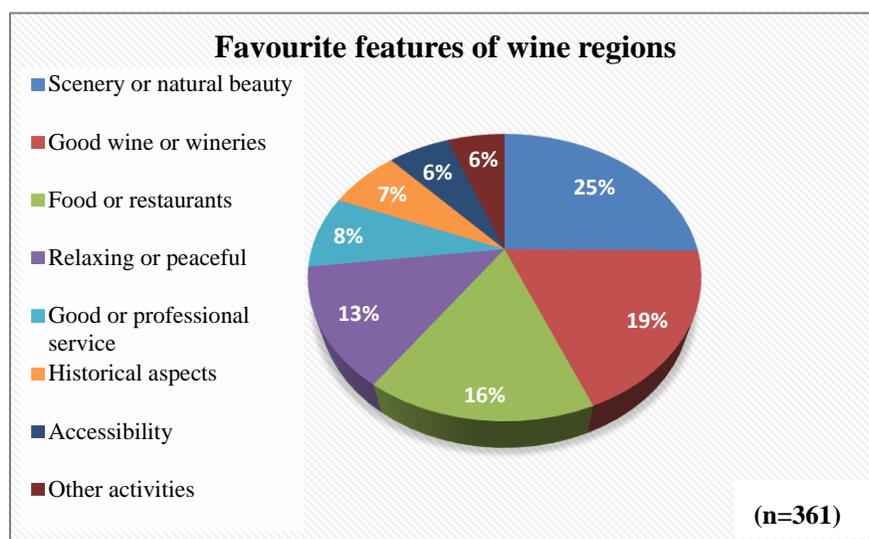
Source: Visitor survey

Figure 6.6 South Africa’s most favourite wine routes among tourists

It is expected that the Stellenbosch Wine Routes is the favourite among visitors as this route has the most wine farms and estates and is also the most well-known as it was the first established wine route.

The responses from the respondents again confirms the Stellenbosch-Franschhoek-Paarl winescape. Seventeen per cent of the respondents indicated that Constantia is their favourite wine route. This is also expected as visitors tend to stay overnight in Cape Town when visiting South Africa.

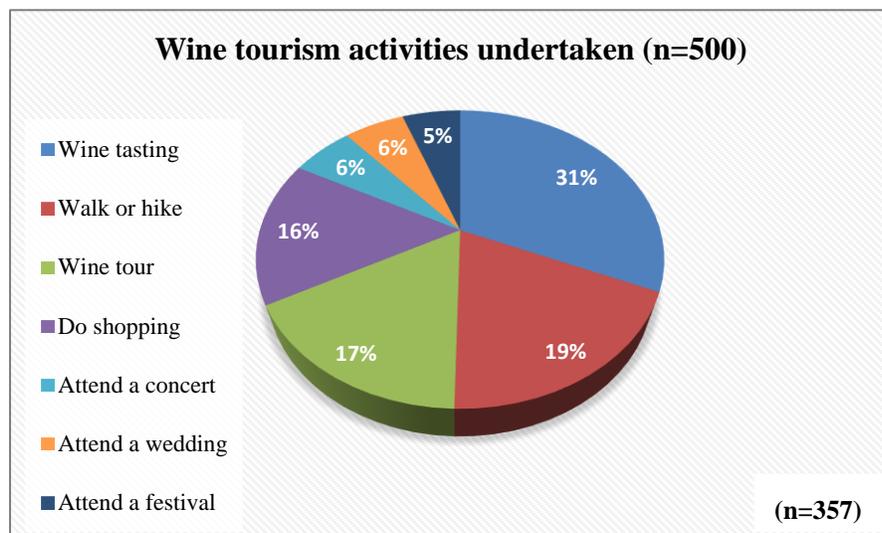
Respondents were given 8 qualities of wine regions they were asked to name as appealing to them. An 'other' possibility was also given. Figure 6.7 shows most (25%) of the respondents regard the natural beauty and scenery of a wine region as appealing to them, good wine and wineries (19%) and food and restaurants appealed to 16%. Relaxing and a peaceful environment (13%) along with good and professional service (8%) appealed to respondents. Other activities include outdoor activities such as cycling. These findings support Olaru's (2012) contention that visitors visit wine regions for different and various reasons and not only for activities devoted to wine.



Source: Visitor survey

Figure 6.7 Most favoured features of wine regions in South Africa

Visitors were asked what tourism activities they had undertaken while on their trip. Eating at restaurant (27%), wine tasting (23%), hiking or walking (14%), going on a wine tour (12%) and shopping (12%) were the activities mentioned most (Figure 6.8). These results confirm Olaru's (2012) finding that wine tasting, appreciating the landscape, enjoying the food and socialising with friends and family are common activities associated with wine tourism.



Source: Visitor survey

Figure 6.8 Activities undertaken by wine tourists

The implication of the above mentioned indicates that wine tourism not only includes wine tasting. Any activity undertaken in the winelands, on wine farms and estates and wine routes are involved in wine tourism, diversifying this activity to more than tasting wine and appealing to a wider market of tourists.

6.2.3 Economic value of tourists' trips, South Africa's wine tourism experience rating and sources of information

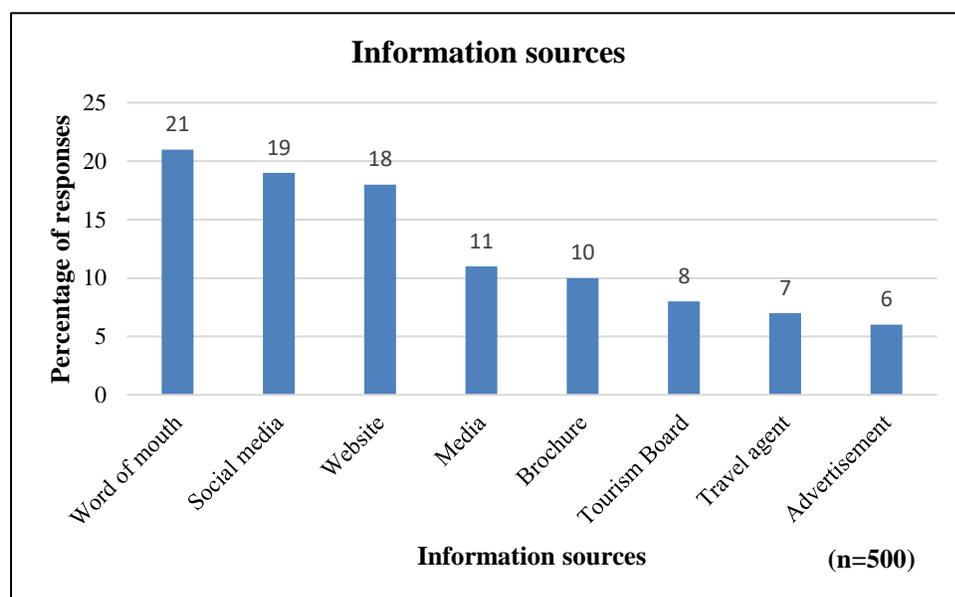
This section will report on the economic value of tourists' trips; second how the respondents have rated South Africa's wine tourism experience; third the information sources used by respondents.

To assess the economic value of the tourists' trips, they were asked how much they spend during their trip per day. Because of sensitivities about financial matters, the question specified expenditure categories. The majority (67%) spent more than R500, 24% spent R200-R500 and 8% spent less than R200 while on the trip. This accords with other studies that found that that typical wine tourists are above-average income earners (Folwell & Grassel 1995; Dodd & Bigotte 1997; South Australian Tourism Commission 1997; Mitchell, Hall & McIntosh 2000; Treloar, Hall & Mitchell 2004; Alebaki & Iakovidou 2011).

Visitors were asked to rate South Africa's wine tourism experience on a scale of one to five with five the highest. The result was that more than one half (53%) of the respondents rated South Africa's wine

tourism experience as five and 90% rated is four and higher. A good rating is vital in building the South African winelands image, but the challenge lie in constant innovation to maintain good ratings in the future.

Respondents were asked how they heard about the wine farm, wine region or wine tourism experience by choosing from eight named sources. The majority indicated word of mouth (64%) followed by social media (21%) and websites (19%) (Figure 6.9). It is surprising that sources like brochures, tourism boards, the media, advertisements and travel agents were less important, collectively being named only 32% in the responses. Platforms like social media (Facebook, Instagram and Twitter) are now widely used by users across the world and can access a wide range of people as it is easily and quickly accessible to anyone. The tourism board, travel agents and advertisements are not frequently used by visitors, as it is more convenient to do travel arrangements online (Sigala, Christou and Gretzel 2016).



Source: Visitor survey

Figure 6.9 Respondents' sources of information about wine tourism

6.3 CONCLUSION

This chapter has provided a snapshot of the perceptions and expectations of wine tourists when visiting wine farms or estates, wine routes or wine regions. Respondents revealed that the Coastal Region is the favourite region, with the SWR and the Franschhoek Wine Route as the favourite wine routes. The

typical wine tourists are females and domestic travellers. Respondents are also likely to plan holidays and trips around wine tourism activities as well as return to previously visited wine regions. The natural beauty, scenic landscapes, good wines and food appeal most to the visitors. Eating at a restaurant and doing wine tasting were the most popular activities, an affirmation of the link between food and wine in tourism. Wine tourism experiences are much more than merely drinking wine or enjoying the experience of wine. They are often part of a bundle of experiences wrapping together winery visits, wine tasting, visits to the wine area, enjoying scenery and visits to other local attractions. Chapter 7 examines the wine and wine tourism industries' role in social and environmental best practices.

CHAPTER 7 THE WINE AND WINE TOURISM INDUSTRIES' ROLE IN SOCIAL AND ENVIRONMENTAL BEST PRACTICES

7.1 INTRODUCTION

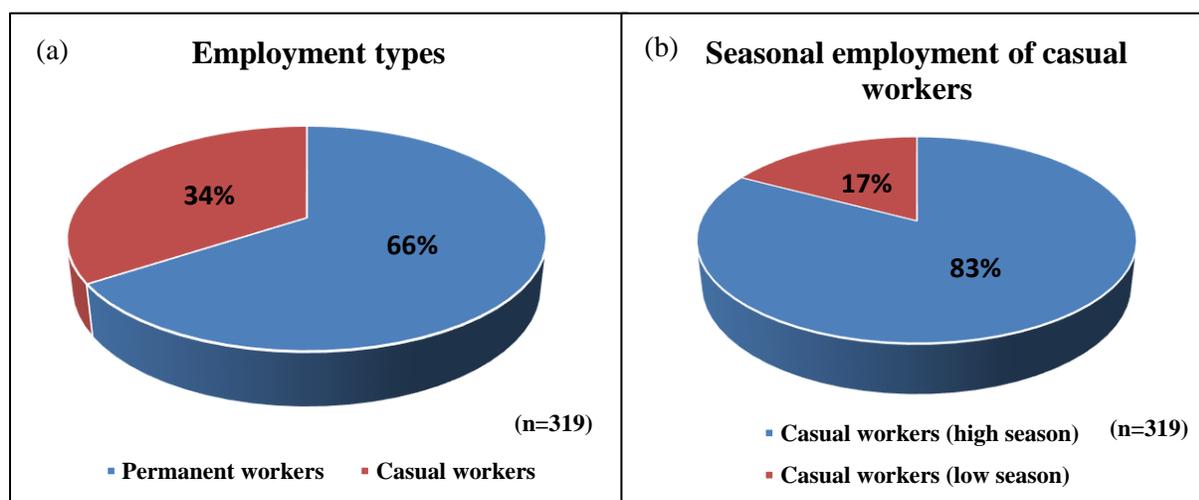
This chapter investigates the social and environmental best practices of the wine (and wine tourism) industry in South Africa in terms of job creation, skills development and capacity building. First, the chapter explores the industry's contribution to job creation in South Africa. Second, the chapter looks at the skills development programmes provided for the employees. Third, the social and environmental best practices of the wine (and wine tourism) industry in South Africa are examined. Last, a case study is documented as a good example of social best practice. This chapter draws on information acquired from the wine farm survey, secondary reports, articles and a desktop study on Solms-Delta.

7.2 THE WINE INDUSTRY'S ROLE IN EMPLOYMENT

This section examines the employment numbers on 319 respondent wine farms and estates on South Africa's wine routes. First, the overall number of permanent workers and casual workers employed by the wine route members is presented. Second, the number of employees employed on the wine routes in tourism-related jobs is detailed and the skills development programmes provided for the employees on the wine farms and estates are described. Whereas the South African wine industry contributed to nearly 300 000 jobs in 2015, this chapter concentrates on employment by 319 members of the South African wine routes.

The South African Wine Industry Statistics (SAWIS 1997-2004) reported that the majority of the permanent farm worker families are Coloureds. Moreover, the number of African women and men comprising casual and seasonal workers is increasing and Africans are more frequently employed in the wine cellars than on the wine farms. SAWIS (1997-2004) recorded that each year between 1996 and 2003 there were 45 000 farm workers with 300 000 dependent relatives, many of whom are also employed on farms. However, these numbers are increasing (Williams 2005). The number of workers employed in wine cellars has increased from 3000 in 1996 to 3500 in 2003, although the number of cellars grew from 292 to 505. In 2003 wine grapes were produced on 4435 farms (4646 in 1996), nearly all of which are owned by white farmers and white-owned companies which employed permanent, seasonal and casual workers (SAWIS 1997-2004; Williams 2005). There is a growing realisation on

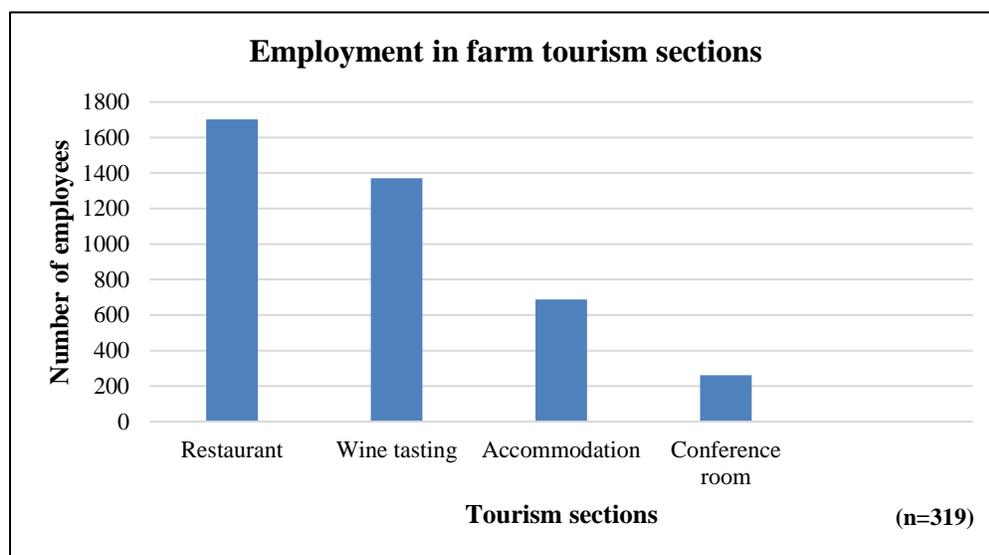
wine farms and estates of the positive roles they can play in job creation, skills development and capacity building, employing more workers on a permanent basis and assisting in social upliftment projects benefiting the workers and their dependent families. Figure 7.1a shows that two out of three workers on the 319 participating farms are permanently employed. The total number of permanent workers reported by the surveyed wine route members was 15 046, casual workers totalled 7832. Bruwer (2003) studied a sample of 355 wine farms and estates in all the wine regions and wine routes of South Africa in 2000 to 2001 and found that 2268 workers were employed permanently and casually on a smaller sample of 125 wine farms and estates. This small number is a significant indicator of the extent of the industry at the time and the substantial contribution the industry has made in 14 years in terms of job creation. Figure 7.1b displays the proportions of casual workers employed during high season (harvesting season) and low season.



Source: Wine farm questionnaire survey

Figure 7.1 Permanent and casual employment on participating wine route member farms in 2015

In terms of the jobs in the different tourism sections from the wine farm questionnaire (Wine tasting, conference room, restaurant and accommodation), Figure 7.2 shows that most of the employment opportunities are within the wine tasting and food catering services.



Source: Wine farm questionnaire survey

Figure 7.2 Employment within the different tourism sections

Employment in restaurants totalled 1700 (43%) people, 1370 (35%) people in wine tasting departments, 650 (16%) in accommodation and 250 (6%) in conference rooms. Bruwer (2003) reported that, collectively (permanent and casual), 409 people were employed in wine tourism and tourism-related jobs, with 431 people employed in the restaurants on the wine farms. Bruwer (2003) recorded a total of 7775 people employed in the four sections on the wine farms. The whole South African wine industry employed almost 300 000 people in 2015 of which 170 000 people are in the Western Cape.

7.2.1 Skills development programmes of South Africa's wine route members

Seventy-four per cent of the wine route members questioned offers skills development or training programmes the others do not. The general training programmes, namely basic first aid, personal hygiene, adult literacy, safety training, management skills, office skills, and telephone and communication skills. Vineyard and cellar training involves safe handling of chemicals, tractor training, forklifting, firefighting, spraying, operator and driver training, and pruning. Other in-house training is training in wine knowledge, cooking, and sales and waiter training. Employees are sent to various institutions for training and courses, namely the Cape Wine Academy, Graham and Rhona Beck Skills centre and various SKOP (Afrikaans for cellar-worker training programme) courses at Elsenburg. Worker skills have been upgraded on most farms over the last few years (Ponte 2009). Workers have been educated in innovative ways of pruning, forklifting, canopy management, and

disease and pest control (Ponte 2009). Most training occurs on the job, combining ‘theory’ and practical application in the vineyard. Even though the average educational level of the labour force is perhaps not more than seven years of schooling (between 20% and 25% are illiterate), there are indications that most workers have adapted well to the new skill requirements (Ponte 2009). Wine route members are promoting job creation, building capacity and contributing toward the quality of life for the employees and their family members. Employees gain experience in specific sections of the wine tourism industry, so equipping them with appropriate skills and training to find jobs in other sectors.

The South African wine industry’s contribution to employment shows that the majority (66%) of the workers are employed permanently and 83% of workers are employed casually during high season. Most of the employment opportunities are in the wine tasting and catering services. Also, seventy-four per cent of the wine route members do offer skills development and training programmes to their employees. The next section reports on the social and environmental best practices.

7.3 SOCIAL AND ENVIRONMENTAL BEST PRACTICES

First, an overview is given of some of the conservation initiatives employed by the wine industry; second, the social best practices of the industry are summarised; and third, the social development programmes followed by a leading wine estate are described in a case study.

7.3.1 Conservation initiatives and environmental best practice in South Africa

South Africa’s wine industry is dedicated to protecting its natural heritage and it is a world leader in production integrity. The Integrated Production of Wine (IPW) programme was introduced in 1998 as a sustainable farming initiative. Already in 2008, more than 95% of all winegrowers and wine cellars in South Africa follow IPW guidelines. The IPW covers environmental impact care, monitoring of water usage, health and safety, and protection of South Africa’s biodiversity (Du Plessis & Boom 2008; Swanepoel & Bailey 2008). The Biodiversity & Wine Initiative (BWI) was established in 2004. The initiative focuses on promoting participation and awareness on driving conservation-minded farming practices (BWI 2016). The BWI demonstrates the perfect balance between farming and nature. In the past 10 years 223 South African grape and wine producers have together conserved about 144 000 hectares of land on their farms, guaranteeing that the South African wine industry's conservation print is now well in excess of its current vineyard footprint of 99 463 hectares (BWI 2016). The Wine of Origin (WO) scheme, introduced in 1973, is administered by the Wine and Spirit Board (WSB) and

aims to guarantee the integrity of South Africa's wine. Thus, if a wine claims origin, it is the constitutional regulations which ensure that the wine is in fact from that origin. When the abbreviation (WO) or the term (Wine of Origin) is on a bottle of wine, the consumer can be 100% sure that the grapes from which it is made is from that specific area (WOSA 2016). Sustainable Wine South Africa (SWSA) acts as the alliance between the WSB, World Wide Fund for Nature (WWF), the IPW scheme and Wines of South Africa (WOSA). South Africa launched the world's first industry-wide sustainability seal in 2010 (WOSA 2016). The seal was issued by the WSB, guaranteeing a certified wine's, environmental credentials according to measurable and auditable criteria. The Wine of Origin system traces the bottle of wine all the way back to the vineyard and the new seal adds the growing practices in that vineyard, offering a highly-sophisticated degree of traceability. The goal is to have 100% of certified wines qualifying to carry the new seal by 2025. In May 2012 the Wine and Agricultural Ethical Trade Association (WIETA), a not-for-profit, voluntary association of many different stakeholders who are committed to the promotion of ethical trade, introduced a new seal to be used alongside the sustainability seal. Also believed to be a world first among wine-producing countries, it testifies to reasonable working conditions, based on rigorous and closely monitored qualification criteria (Du Plessis & Boom 2008; Swanepoel & Bailey 2008). The goal is to have one seal, issued by the WSB, that certifies the WO information (vintage, date, variety), the environmental sustainability (IPW) and the ethical treatment of workers (WIETA).

South Africa has made major strides in quality management (especially since the mid-1990s), both in the vineyards and in the cellars. These improvements have included better styles; cleaner and more scientific winemaking; new technologies such as micro-oxygenation and reductive handling; and management of vineyards increasingly based on separate blocks rather than on the whole vineyard (Ponte 2009). The production of better quality wine requires the implementation of technical measures in the vineyard, such as cultivar-terroir adaptation, vigour and yield control, and environment-friendly production. Cultivar-terroir adaptation is an essential element of the production of grapes for quality wines. As cultivars are often new and the terroir highly diversified, enterprises are forced to build spatial databases of various kinds, enabling the identification of plants' agronomic behaviour and the oenological results of grapes per their annual variability in the different parts of the vineyards (Archer 2001; Carey 2001; Ponte 2009).

Eighty-six per cent of the participating wine route members encourage environmentally responsible farming practices on their farms and estates. These practices include recycling, limited use and caution

when spraying pesticides and herbicides, hazard analysis and critical control points (HACCP), removal of alien species, use of recycled grey water for gardens and irrigation, use of borehole water and registration with IPW and BWI as a high priority. Other practices are using chemicals only when necessary, using beneficial insects, applying organic farming methods, using water-filter systems, preserving a certain percentage of land for conservation and employing solar panels on farms to reduce carbon emissions. Some farms use the skins of the grapes after the wine making process is complete to make compost, others strive for a minimum carbon footprint while many apply soil conservation and anti-air-pollution practices. Such practices are applicable to any agriculture route, whether conventional, sustainable, organic or biodynamic (Hunter et al. 2011).

7.3.2 Social best practices of South Africa's wine route members

Apartheid may have ended 20 years ago, but the levels of social inequality in South Africa are still vast. The wine industry is evidently in need of transformation. It was founded on slave labour but its labour relations were reconstructed in the aftermath of emancipation into a system marked by low wages and poor housing and the dependence of workers and their families on the farmers and their farms (Prince 2004). The supply of alcohol to workers, the *dopstelsel* (tot system), generated high incidences of foetal alcohol syndrome and tuberculosis, and unfortunately the system has long outlived its abolition in 1962 (Worden 1985). A few 'free blacks' (*vryzwarten*) owned wine farms in the early eighteenth century, of whom Louis van Bengaal who owned Lanzerac is the best-known example (Worden 1985). The KWV had 'one or two' black members in its early years and a 'couple' of applications were rejected in the late 1960s "because of the practical problems it would bring in the light of apartheid legislation" (Williams 2005). Economic and social exclusions, reinforced by legislation, halted the emergence of a stratum either of Coloured or African wine farmers. Their task was reduced to labour in their masters' vineyards (Williams 2005). In 2007, the South African Wine Industry banned the production of 'papsak' wine (cheap wine) (Johns 2007) and the *dopstelsel* has largely been eradicated.

A recent (2016) documentary (*Sunday Times* 2016), 'Bitter grapes-slavery in the vineyards', portrays South Africa negatively, claiming violations of labour laws on South African wine farms. The *Sunday Times* (2016) reported that some supermarkets in Denmark took South African wines off their shelves (*Sunday Times* 2016). South Africa is the second most popular country of origin for wine sales in Sweden. In Denmark imports have increased to a significant 78% over the last decade and the Scandinavian region consumes 50 million litres of South African wine annually. The documentary

describes widespread violations of labour laws, including workers receiving R105 for a 12-hour shift; exposure of workers to toxic pesticides without protective gear or training how to use the chemicals; shocking living conditions; deductions of up to 80% from wages; and a continuing *dopstelsel* (*Sunday Times* 2016). The allegations against the wine industry are regarded as a serious matter and they have been investigated by various stakeholders (*Die Burger* 2016). Alleged violations like these cast a dark shadow of unfortunate conditions, whether true or not, on wine farms in general. But fortunately there is ample evidence of positive support, assistance and upliftment on farms on the wine routes studied in this research.

The wine farm survey was used to examine the social development projects offered by the wine routes. The participating wine route members offer various social development projects for their employees that also benefit their families. Sixty-eight per cent of the wine route members indicated that they do encourage social development projects. Such projects involve having a clinical sister, nurse and social worker available to the employees every week; allowing employees to have vegetable gardens and sell the produce as part of their own income; contributions to the purchase of school uniforms; and sponsoring the secondary or tertiary education of children of the employees. Bursaries are also given to the employees who wish to receive further educational training for themselves as well as for their children. There are various crèches on the wine farms for the employees' children. Numerous wine farms and estates allow their employees to live on the farm. Employees are also provided with pension, medical aid and sports facilities. The children of the employees have an after-school supervised, homework hub, where children do their school work with a supervising teacher.

Some wine farms and estates support the Pebbles Project, of which the main aim is education. The project works specifically with the families and children in the winelands farming communities in the Western Cape (Pebbles Project 2016). The project started in 2004 and currently runs five subprojects, namely an education, health, nutrition, community and protection programmes. In 2014 Pebbles supported 850 children. Other social contributions of the wine route members include sponsoring rugby and soccer teams, providing the employees and the children with computer centres, libraries and medical centres (Pebbles Project 2016). Some members also donate a certain percentage of their profits to schools, skills projects and development programmes. Many of the wine farms and estates are members of WIETA. The participating wine route members have an impressive record of uplifting, supporting and contributing financially to their employees, their children and surrounding communities. The next section explores one selected wine estates in South Africa.

7.3.3 Case study: Solms-Delta

One case was selected as the leading wine estate in the wine industry concerning community upliftment and social development. The history of the Solms-Delta wine estate is discussed first, followed by examinations of the Wijn de Caab Trust and the Delta Trust. Data and information were obtained by performing a desktop study, using mainly information gathered from online websites.

Solms-Delta is known as one of the country's most progressive wine estates for its social contributions to its employees and their families. When Mark Solms acquired Delta farm he convinced the farm's occupants that his goals to institute land reforms were genuine (Franschhoek Wine Valley 2016). The Solms family established the Wijn de Caab Trust in 2005 to benefit and assist the 200 disadvantaged residents and employees of the Solms-Delta wine estate. Solms then persuaded long-time friend, Richard Astor to buy the adjacent farm and to increase the Solms-Delta estate's development capital. Solms and Astor pledged their farms as security so that an adjoining farm could be purchased by the workers (Solms-Delta 2016). The Wijn de Caab Trust has a 33% equity stake in Solms-Delta. The Wijn de Caab Trust, has been a one-third owner of the three adjacent farms, since 2007. The profits from wine sales have been used to build and refurbish decent and comfortable homes for the workers and their families, create recreational facilities and provide many other social services, such as healthcare and private education, that benefit everyone on the farms. Every employee has an interest in making a success of Solms-Delta (Solms-Delta 2016). The Wijn de Caab Trust solely benefits the employees and farm residents of the farm. Figure 7.3 shows the employee housing on Solms-Delta.



Source: Solms-Delta (2016)

Figure 7.3 Employee housing on Solms-Delta

The goal of the Wijn de Caab Trust is to break the cycle of poverty and dependency among historically disadvantaged residents and employees on the estate (Franschhoek Wine Valley 2016). In the rural agricultural areas of South Africa, the children of farm workers are often destined to become farm workers. The Trust aims to broaden farm children's horizons and opportunities by creating educational opportunities and minimising the burdens on their parents while improving the quality of life on the farm (Solms-Delta 2016). New, attractive houses for workers and residents have been built and existing houses have been renovated and upgraded, all fitted with satellite television. While primary and secondary education is subsidised by the government, the Trust covers the additional costs of model C education, as well as vital remedial help and other forms of educational assistance. Crèche facilities and an after-school educational centre have been established. Financial support for tertiary education is available to qualifying learners and an active adult-education programme is supported. High-quality medical care is an important component of the Trust which covers 85% of its beneficiaries' medical and dental bills. A variety of sports and recreational facilities, along with coaching, are provided or supported. These programmes are overseen by a full-time social worker (Solms-Delta 2016).

In 2007, the two families established the privately funded Delta Trust which seeks to facilitate an inclusive sense of community through educational, cultural, sports and social programmes. The founders of the Delta Trust believe that what happens on local Franschhoek farms could have a ripple effect throughout their valley, the winelands, the country and even beyond. The Delta Trust aims to contribute to nation building at a local scale, focusing first on the Franschhoek Valley, and more broadly, the Cape Winelands. Its mission is to contribute to greater social cohesion and inclusiveness in South African communities (which for obvious historical reasons were unhealthily divided) through careful, patient and creative local cultural work. The Trust supports a broad range of projects, including education, cultural heritage, social upliftment, sport and recreation. Its best-known beneficiaries are The Franschhoek Literary Festival, an annual celebration of books and writers, and The Franschhoek Oesfees (harvest festival), an annual harvest festival for local farm workers that features the traditional, vernacular music and cuisine of the Cape Winelands. Figure 7.4 shows farm workers enjoying the annual Oesfees (Solms-Delta 2016).



Source: Solms-Delta (2016)

Figure 7.4 Solms-Delta employees dancing during the Oesfees

Many local research projects on previously ignored areas of study have received sponsorship from the Trust. Two of these are the Museum van de Caab which explores the history of the ordinary people of the Franschhoek Valley and Music van de Caab a cultural centre currently under development which will frame and explore the colourful musical heritage of the Cape. Some of the other programmes recently supported by the Delta Trust are the Ke Moja (Say No to Drugs) Campaign, the President's Award Programme, Paarl Heemkring, Franschhoek FM Community Radio, Allandale Rugby Club, the local Ladies' Cricket Club, Cape Winelands Basketball League and Spes Bona Football Club (Solms-Delta 2016).

First, an overview was given of some of the conservation initiatives employed by the wine industry. Eighty-six per cent of the participating wine route members encourage environmentally responsible farming practices on their farms and estates. Second, the social best practices of the industry are summarised (Franschhoek Wine Valley 2016). Sixty-eight per cent of the participating wine farms and estates offer various social development projects for their employees and their families. Lastly, the Solms-Delta Wine Estate was discussed as a case study in order to give an example of a wine farm that is involved in community upliftment and social development.

7.4 CONCLUSION

South Africa's wine and wine tourism industries play vital roles in the creation of job opportunities and the upliftment and support of the industries' employees and community. Social and environmental practices have grown over the years in the wine industry and wine tourism. The results from the wine farm questionnaire survey reports that the 319 participating farms in South Africa employ more than 15 000 workers on a permanent basis. Two thirds of the participating members encourage social development projects, and employ skills development and training on their farms and estates. Four out of five of the members employ environmentally responsible farming practices. Thus, the wine and wine tourism industries play noteworthy roles in capacity building, skills development and training in various sections of the farms, supporting employees and family members, increasing their quality of life and minimising the size of a harmful environmental footprint.

CHAPTER 8 CONCLUSION

This chapter highlights the main findings. The objectives are reviewed, limitations are summarised, some implications of the results are given, recommendations are made for the future development of wine tourism in South Africa and possible avenues of research are suggested.

8.1 REVISITING THE AIM AND OBJECTIVES

The aim of the research was to determine and analyse the nature and extent of the development of wine tourism in South Africa. Seven objectives were set out for realising the aim. Each of the objectives is revisited in this chapter and the main findings are presented to evaluate the respective objectives.

Objective 1: Undertake a comprehensive search for appropriate literature and review the concepts, theories and case studies related to wine tourism, wine route development, regional economic development and social responsibility on farm level.

Various peer-reviewed academic journals, books, annual industry reports, newspaper reports and theses as well as theories, concepts, case studies and development models were examined to realise this objective. The literature on the basic concepts of tourism and geography were reviewed to contextualise wine tourism development in the broader context of tourism and the discipline of geography. A substantial part of the literature review focused on the development and evolution of wine routes around the world. A significant part of the literature regarding wine tourism concentrates on the supply-side of the phenomenon and a gap exists regarding the demand-side of the industry that is the perceptions and desires of the tourists. The extant literature on wine tourism and wine tourism development makes it evident that four economic sectors exist at node or farm level. First is the primary agricultural sector involving the production of wine grapes on wine farms. The secondary sector relates to the transformation of grapes into wine on wine farms and estates. At tertiary level wine and wine products are sold at the cellar door or shops on the farms. The quaternary sector encompasses the provision of services, especially hospitality to wine tourists. Literature was consulted to assist with the development of the research instruments, especially to guide the construction of the assessment framework for analyses at the node, network and space levels. It emerged that the literature on the stage of development of single wine farms or estates and wine routes is limited necessitating recourse alternative development theories. Some of Miossec's (1977) ideas about the spatial dimension of the development of wine routes at destination level are still applicable four decades later. The model postulates that the spatial development of a destination begins a pioneer node (an open cellar door);

expands to network formation (wine route development with multiple nodes connected through a road network); and culminates with a destination system (more than one wine route with an integrated nodal and network system with signs of hierarchical differentiation between the nodes and the routes). Butler's (1980) TALC (tourism area life cycle) is clearly related to all the economic, community and environmental dynamics of wine tourism. This model postulates that decline or planned rejuvenation are not inevitable, but they are a possibility in certain evolutionary stages. Dodd & Beverland (2001) expanded these ideas into an assessment framework more appropriate to wine tourism destinations, namely five life cycle stages ranging from winery establishment to recognition, then regional prominence to maturity and, finally, tourism decline.

The literature study confirmed that wine tourism is a field examined and explored internationally. Many countries are realising the potential of the wine tourism industry for attracting domestic and international travellers, assisting in regional development and job creation, and attracting new investment to regions. Wine tourists seek more than wine, desiring added value in terms of innovative products and experiences. The literature also affirms that the socio-economic contributions of wine tourism to wine regions globally have potential positive impacts on the surrounding rural communities and that the industry can assist in attracting new business, promoting regional development, creating employment opportunities and allowing communities to capitalise on the wine tourism products and experiences. Wine tourism development in rural areas has been shown to extend beyond the wine farms and estates into rural areas. There are of course potential detrimental impacts like traffic congestion, overcrowding and exploitation of rural products. Notwithstanding the adverse side of wine tourism, the phenomenon is present all around the world in numerous different ways.

Objective 2: To visualise the distribution of all wine grape-producing farms in South Africa.

Objective 3: To show the distribution of all wine grape-producing farms involved in wine tourism activities in South Africa.

Objectives two and three aimed to map the distribution of wine-producing farms and estates involved in wine production and wine tourism activities. A spatially enabled database was created on Microsoft Excel with the contact information and global positioning system (GPS) coordinates of the wine-producing farms in South Africa and the wine farms and estates that are members of the country's official wine routes. This database also was used in the surveys to collect information. Work to achieve the second and third objectives extended over the first three months of 2015 before the surveys

commenced. A total of 22 maps were created for this research. Some problems did arise with creating the maps, as not all GPS coordinates from the wine farms and estates are available. Some wine routes (for example the Klein Karoo Wine Route) stretch over a large area, not allowing for a zoomed in and detailed map. Other smaller wine routes (for example the Darling Wine Route) stretch over a small area, allowing for a more zoomed in and clear map.

Objective 4: Conduct a census of wine farms and estates regarding all their tourism-related infrastructure, superstructure, products and experiences to determine the current state of wine tourism development in South Africa.

Objective 5: Determine the clustering of tourist-related facilities and number of wine nodes (critical mass) on the country's wine routes and position each route in terms of its phase in the tourism area life cycle.

The fourth objective involved a wine farm questionnaire (24 questions) survey conducted to collect data on the state of wine tourism development at wine farm and estate level. Respondents for 319 wine-tourism nodes completed the questionnaire. Weighted values determined the degree to which each node (winery) was developed as shown by the clustering of wine-related activities and experiences at a node. Weights were assigned to core wine-tourism-related products, experiences, superstructures and services to a maximum of 100 points per node. Opportunities for wine tasting, wine-production experiences (cellar tours), pairing of food and wine, fine dining, sleepovers on a wine farm, spa treatments (vino therapy) and taking part in outdoor activities (hiking, mountain biking) scored 70 points (70%). Other tourism services and the capacities of superstructures accounted for 30 points (30%) in this framework. Application of the weights distinguished nodes best developed for wine tourism. The development scores from the winery nodes (Appendix D) show that some nodes have become resorts (for example Grande Provence, Groot Constantia and Lanzerac Wine Estate) in their own right with flagship wineries, luxury hotels with spa facilities, more than one restaurant and excellent art collections that draws visitors to them. Some of the winery nodes do not necessarily cater for many people so that capacities played a lesser role and consequently they have a lower rank, although they have developed into resorts.

In pursuance of the fifth objective, a further procedure determined the state of tourism development on 19 wine routes by summing the weights of all the nodes on a route to derive a weighted total for each route. The six top-performing wine tourism routes were Stellenbosch, Franschhoek, Constantia, Paarl, Robertson and Durbanville. Each wine route was positioned in a life cycle phase according to a

weighted assessment framework. The three wine routes (Darling, Klein Karoo and Stanford) in an *Emerging* phase are lacking in the number of facilities, services and their capacity ranges, and their focus is on the wine product and not necessarily on a wine tourism product. All three routes are relatively far from Cape Town where they miss out on many day trippers, even overnight stays due to a lack of tourist beds. In the *Acknowledgement* and *Prestige* phase the latter feature already presents differently as more facilities and services are offered and more visitors are accommodated. Thus, there is a shift toward incorporating various other wine products and experiences. Wine routes capitalise on new facilities and activities, so attracting more visitors. Fifty-three per cent of the wine routes are in the *Acknowledgement* phase, namely Bot River, Plettenberg Bay, Hermanus, Swartland, Worcester, Tulbagh, Breedekloof, Wellington, Namaqua West Coast and Constantia (it is suggested that this route should be positioned in the *Mature* phase). The four routes that are in the *Prestige* phase, namely Elgin, Durbanville, Paarl and Robertson, have the graduate to the *Mature* phase since they are not far behind the two mature routes on development scores and they offer distinctive wine-tourism-related products and experiences, and they already receive large numbers of visitors.

Concerning the *Mature* phase, the two wine routes, Franschhoek Vignerons and Stellenbosch Wine Routes (SWR) are the prime examples of individual wine farms establishing a network, working collectively so that they are destinations offering a wide variety of wine tasting rooms, restaurants, accommodation, art galleries, museums, outdoor activities and private function venues. SWR comprises five subroutes, clear indication of the level of development reached on this route where constant innovation of the wine product and experience is a vital feature. The SWR is the trendsetter among South African wine routes and more than half of its member wineries have incorporated food-related products into their wine tourism product. The range of activities presented at the route's 152 wine tourism nodes, the rewarding experiences created and the renowned wines provide the critical mass to vie for local and international wine tourists. The SWR has expanded its product offerings to attract well-heeled tourists to elegant hotels, B&Bs, guesthouses and self-catering accommodation as well as top-class restaurants that draw on the winescapes ambience and the magnificent scenery.

What is the current state of South Africa's wine tourism industry? One way to answer this is to compare the South African wine tourism industry with others in the world. Spain has the largest winegrowing are in the world and some 5000 wine farms and estates. But only 10% of these are open to the public and their wine tourism industry is almost wholly in the "*Infancy*" or *Emerging* phase. By contrast, South Africa has roughly 3232 wine-producing farms and 451 wine route member farms of which 80%

are open to the public, all pointing to an organised and developed South African wine tourism industry. In comparison, in the USA and Australia, 70-80% of the wine farms are open to the public (Marzo-Navarro & Pedraja-Iglesias 2012).

France, the leading tourist destination in the world, annually attracts over 7 million wine tourists of whom 2 million are international wine tourists (Menival & Han 2011). Despite these visitor numbers, France is not well organised regarding their wine tourism product and experience as their accent remains on being traditional wine producers. South Africa attracts far fewer- approximately 2 million domestic and international- wine tourists since the country is considered as a long-distance destination (Bruwer 2003; WOSA 2016). Although South Africa has 21 well-organised wine routes, the country is not yet seen as a leading tourist destination. Compared to Chile, the South African wine tourism industry has the distinctive feature of its wine routes being near to a metropolitan area, namely Cape Town (Kunc 2008). Italy's wine tourism industry is superior with its 140 wine routes (Romano & Natilli 2009). Australia has over 1000 wine farms and estates, and their wine tourism industry has innovated by developing spas and hotels on the wine farms and estates to compensate for the long-distance visitors have to travel, thus in return encouraging overnight stays on the wine farms.

This being said, South Africa's wine tourism industry is not in its *Infancy* phase (Scott 2010). This study determined that the majority (74%) of the 19 wine routes assessed are already in the *Development* phase, 10 in the *Acknowledgment* and four in the *Prestige* phases, the latter four routes close to joining two routes already in the *Maturity* phase. This assessment is the first to indicate the level of development reached by South Africa's wine tourism industry in which products and experiences on offer are continuously being diversified and innovated. Although the wine tourism product is still mainly enjoyed by the domestic market (69%), international visitors (31%) are increasingly recognising South Africa as a wine tourism destination. South Africa is dynamically emerging as a New-World wine country with one of the oldest wine industries, but now with a reputable wine tourism industry. South Africa is positioned to compete with Australia, and the USA and even some New-World wine tourism destinations.

Objective 6: Investigate the perceptions of visitors to Cape Town on their wine tourism experiences in the Western Cape as well as other South African wine regions.

Objective six is about the perceptions of visitors to Cape Town regarding their wine tourism experience in South Africa. A visitor questionnaire (13 questions) was administered to 500 respondents to obtain

information for understanding the perception, desires and expectations of wine tourists with the goal to determining the ideal product and experience expected by visitors.

Concerning the *visitor profile*, there were more females (55%) visiting wine regions than males, but in light of couples visiting the wine farms together the close female:male ratio is explicable. Fifty per cent of the respondents were groups older than 34 and 64% of the respondents were domestic travellers (64%) which is close to the wine farm questionnaire survey's 69%. The foreign respondents were mainly from the USA and the UK. An average of two to four overnights were spent in the winelands. Respondents spent more than R500 per person per day while visiting the wine routes.

Regarding the *wine regions*, the Coastal Region (Stellenbosch, Swartland, Constantia, Tulbagh, Paarl, Franschhoek and Darling wine routes) was the favourite among the respondents. Two out of three (68%) respondents have visited a wine region before and likely (63%) to take a holiday planned around wine tourism. Forty-three per cent of the respondents are likely to return to previously visited wine regions. Given that the wine farms and estates, wine routes and wine regions are recognised as innovators in their wine products and experiences, the attraction to return will quite likely increase. SWR emerged as the favourite among visitors, followed by Franschhoek Vignerons. The natural beauty and scenic landscapes (25%), good wine (19%) and restaurants and food (16%) are the main features that attract the tourists to the wine regions. The main activities of tourists in the wine regions are eating at restaurants (27%) and wine tasting (23%), while 14% of the visitors participate in outdoor activities, like hiking. This demand-side snapshot of the visitors' perceptions and opinions is a guide to the wine farms and wine routes on how to recast their products and experiences, according to visitor expectations and desires, so ultimately increasing visitor numbers.

Objective 7: Conduct a case study to deepen insights into the social contribution made by a single wine farm.

This objective aimed at understanding the bigger role of the wine industry and wine tourism industry in job creation, skills development and socio-economic transformation, as well as the social and environmental best practices of the wine tourism industry. This was achieved by investigating a leading wine farm, renowned for its socio-economic contribution, skills development and training programmes available for its employees and their families. Information was obtained from the questions in the wine farm survey, gleanings from secondary sources and an in-depth desktop search. The information was analysed by using SPSS and collated.

Regarding the *social and environmental best practices*, 68% of the participating wine route members encourage social development projects for their employees and their family members. Moreover, 86% of the wine route members encourage environmentally responsible farming practices. The case studied Solms-Delta directs various trusts, programmes and projects, and various forms of financial assistance toward the employees and their families. For example, the Wijn de Caab Trust benefits 200 disadvantaged residents and employees. The trusts receive 33% of the profits from estate wine sales and these revenues are used among other uses, to renovate the residents' houses and to support recreational facilities, social services and medical and dental bills of the beneficiaries. The main aim of the trusts is to break the cycle of poverty and facilitate an inclusive sense of community through educational, cultural, sports and social programmes. This case study exemplifies the way wine farms and estates can assist their employees and their families, and promote an inclusiveness in the wine industry.

Even though all seven of the objectives were met, this research was not free of limitations as discussed in the following section.

8.2 LIMITATIONS TO THE STUDY

Most of the study's limitations pertain to the questionnaires and conduct of the two surveys. In the *wine farm questionnaire survey* some (30) wine farms confirmed that they did not participate because of the sensitiveness of the financial questions (questions 5 and 10), despite the two questions being signalled as optional and confidential. Some questions were not answered by some respondents because they had no records, for example visitor numbers or where the visitors come from. Questions in section C (about facilities) and section D (about visitors) were not always answered correctly as questions were interpreted in different ways. This was especially noticed when participants were in a hurry to complete the questionnaire. With regards to section C, the 'white box' were meant to include the capacity (number) of a specific facility and some participants only ticked the box. Question 17 (section D) were also misinterpreted, as participants interpreted the question to ask what their personal 'top three places' were and not the top three places where visitors come from. To obtain the correct information was time consuming as the researcher had to make many telephone calls or send emails or drive to wine farms for interviews. The wine farm survey stretched over the harvesting season (second half of January until end April 2015), making it very difficult for busy farm personnel to complete the questionnaire. Creating maps also raised some problems as the GPS coordinates of the wine farms

were not all readily available and some wine farms or estates either gave the wrong GPS coordinates or did not have the information.

The fieldworkers reported difficulties with question 8 (which wine region is the favourite) in the *visitor survey*, particularly with international visitors who did not know the names or locations of the various wine regions of South Africa. Despite this limitation, completed questionnaires on node level, were still obtained. A suggestion for future visitor questionnaires would be to give all the names of the wine regions and a map.

Initially, objective seven aimed to do in-depth interviews and case studies with leading wine farms and estates regarding their socio-economic contributions to their employees and their family members. Unfortunately, the busy and full-time schedule of wine farms and managers obviated conducting of interviews so that the objective was reformulated to doing an in-depth desktop search on one case study. This limited the scope of the desired coverage of the wine farms' social contributions and provided only partial insights.

8.3 IMPLICATIONS AND RECOMMENDATIONS

The study is important, because of the rapid increase of the wine tourism industry worldwide. South Africa, with its 21 diverse and well-organised wine routes, is a fertile study area for research like this. The nature and extent of South Africa's wine tourism industry is important as the future direction and growth of the industry must be informed by empirical research on the level of development of the industry. Only once the current state of South Africa's wine tourism industry is known and measured against other wine tourism industries in the world, can strategies for evolving the product and experience be developed and implemented. Thus, it is recommended that comprehensible empirical research be done on the current state of the wine tourism industry, only then can future strategies be implemented.

Only in 2015 did the South African government officially recognise the importance of the wine tourism industry and their first wine tourism strategy was launched at the Business of Wine and Food Tourism Conference at Spier in November 2016. Implications from this study include evolving the theory regarding life cycle models. This study is unique in that the development of wine routes in terms of its life cycle phase has not been analysed. It is recommended that more studies are conducted on the application of life cycle phases on wine routes. The latter will assist in determining the extent of

development of South Africa's wine routes. It is also recommended that more in-depth analyses are needed for applying weights to specific services, facilities and capacities and the development scores. The results from this study can assist the wine tourism strategy with initial results on the development of South Africa's wine tourism industry and how the country compete with other industries in the world. The National Tourism Department expressed their support for a national wine tourism strategy. The Tourism Minister Derek Hanekom said:

We support the development of a wine tourism strategy that will see the industry unite behind a common vision, brand and aligned plan to take wine tourism forward. We look forward to working with the industry to help realise the enormous potential wine tourism has in contributing to our country's overall tourism growth (Brophy 2016:1)

Concerning the *industry stakeholders*, there is currently only one active organisation for wine tourism development, namely the South African Wine Routes Forum (SAWRF), a non-mandated organisation comprising all the wine route managers and executive officers, as well as a representative of WOSA. However, it is recommended in order for the country's wine tourism industry to be successful, support must come from all stakeholders, particularly the government (in terms of funding), to develop, grow and ensure global competitiveness of the industry. Empirical follow-up research is recommended to be conducted specifically on the development of the emerging wine routes. Because the more developed or mature wine routes might not innovate as rapidly as the emerging wine routes, research should focus on wine routes still in their early development phase. Also, future research should be addressed to the positive socio-economic contributions by and transformations of the wine farms regarding their employees. The success stories of the wine farms involved in these practices need to be investigated and told. Research must aim to provide insights and understanding of innovations in products portfolios and experiences. The implication of research will hopefully reveal whether there is development and growth in the wine tourism industry or whether the industry is stagnant or declining. Continued research efforts will help industry stakeholders to measure the results of strategies which can then be adapted and improved. The study also recommends more comprehensible mapping of South Africa's wine farms and estates. Mapping all wine farms and estates will not only be useful to the visitors but also reveal the extent of the wine and wine tourism industry, which will assist in keeping record of the country's number of wine farms and estates as well as making the distinction between wine farms and estates involved in only wine production and those involved in tourism activities. By mapping the latter mentioned activities will assist in identifying clusters of wine-producing farms not part of a wine route

and ultimately recommending forming new routes. This way the wine and wine tourism industry of South Africa can grow with more developed wine routes.

Regarding *visitors*, it is recommended that research should be done to investigate the perceptions, opinions and experiences of the visitors, because these insights and inputs are invaluable to transforming, developing and improving the wine tourism industry. The implication is that individual wine farms and estates can use the results to their advantage and stay ‘on top of demand’ throughout the year. It is vital that wine farms and estates keep record of their visitor numbers and the demographics (country of origin, gender and age). The latter will depend on the willingness of the wine farms to partake in such research. It would however entail more detailed attention to visitors when arriving at the wine farm. The expectations and experiences of the younger generation of visitors is important because they will be a wine tourism market in the future and they are more ‘experimental’, eager to try ‘new things’ and they are not reticent about expressing what they want from wine farms and estates. They are typically advanced in communication, media and/or social media platforms. It is recommended that time and effort should be invested in using an array of web-marketing tools such as blogs to reach more people. Consequently, it is important to create a wine farm environment in which the younger generation feels at ease and where the experiences and services are more flexible and personalised.

Apart from the scenic beauty of the winelands, good wine and food were found to be vital attractions of the wine routes and regions. The study recommends that more attention should be directed toward the relationship between food and wine, with future campaigns centred on this. Combinations of wine and related activities such as cooking classes, can be made to reach visitors through their interests and passions. The implication of the above recommendation is that such combinations are an effective way to create an experience that connects people to the brand or region and converts visitors into customers after a trip to wine farms, wine routes or wine regions.

8.4 FINAL WORD

The key success factors in wine tourism regions are threefold, namely the quality and number of wineries (critical mass); a region’s physiographical appeal; and how cultural tourism products augment the product. This study has investigated the level of development of wine farms and estates and all the wine routes of South Africa. The findings confirm that South Africa can hold its own against New-World wine leaders such as Australia and the USA. Successful wine tourism industries rely on

cooperation between government (for funding), individual wine farms and estates, wine routes and industry stakeholders (for marketing). Good wine and extraordinary landscapes count for little if not marketed correctly. South Africa's wine tourism industry continues to stimulate regional development, contribute to the country's GDP and make a difference in the lives of surrounding rural communities. Wine tells a story and allows visitors to be fully immersed in the characteristics of a specific place and to find the truth in the wine.

[Word count: 62 000]

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APPENDICES

APPENDIX A: WINE FARM QUESTIONNAIRE SURVEY

Personal details

1. Ownership of the farm:

Private	Company	Other (Specify) _____
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2. * How many people are employed on the farm? Please indicate the number of people.

Permanent workers	Casual (high season)	Casual (low season)	Other

3. * Please indicate the number of people working in each section. Distinguish between high and low season.

Wine tasting room		Conference room		Restaurant employees		Accommodation employees		Other	
High	Low	High	Low	High	Low	High	Low	High	Low

4. * Do you offer a skills/training programme for your staff? If Yes, please explain the programme _____

5. *(**OPTIONAL**) Please indicate your annual turnover for the following (R):

Total	Wine sales	Souvenirs (retail)	Restaurants	Tours	Functions

A) About the farm

6. * Please indicate your trading hours. If it varies, please stipulate _____

Monday – Friday	Saturday	Sunday	Public holidays

7. * In what region is your farm situated? _____

8. * Which wine route are you a member of? _____

9. * Is wine the primary attraction of the farm? _____

10. (**OPTIONAL**) Please indicate your annual wine sales for the following (R):

Total sales	Red	White	Rose	Sparkling wine	Other

--	--	--	--	--	--

C) About the facilities

11. * What facilities/activities does the farm provide? Please indicate the capacity (no. of people) of applicable facility (write number in white box).

Primary facilities	Wine tastings <input style="width: 40px; height: 20px;" type="text"/>	Restaurant <input style="width: 40px; height: 20px;" type="text"/>	Accommodation <input style="width: 40px; height: 20px;" type="text"/>	Private function venue <input style="width: 40px; height: 20px;" type="text"/>
Historical buildings <input style="width: 40px; height: 20px;" type="text"/>	Conference room <input style="width: 40px; height: 20px;" type="text"/>	Children’s playground <input style="width: 40px; height: 20px;" type="text"/>	Museum <input style="width: 40px; height: 20px;" type="text"/>	Art gallery <input style="width: 40px; height: 20px;" type="text"/>
Secondary activities	Seated tasting room <input style="width: 40px; height: 20px;" type="text"/>	Cellar & vineyard tours <input style="width: 40px; height: 20px;" type="text"/>	Food & Wine <input style="width: 40px; height: 20px;" type="text"/>	Chocolate & Wine <input style="width: 40px; height: 20px;" type="text"/>
Cheese & Wine <input style="width: 40px; height: 20px;" type="text"/>	Mountain-bike trails <input style="width: 40px; height: 20px;" type="text"/>	Horse riding <input style="width: 40px; height: 20px;" type="text"/>	Hiking trails <input style="width: 40px; height: 20px;" type="text"/>	Other <input style="width: 40px; height: 20px;" type="text"/>

12. * Please indicate (in order of preference) which are the most popular experiences on offer to visitors? _____

D) About the visitors

13. * Since when (year) have you received visitors on the farm? _____

14. * What is the average age group of your visitors? (select one group)

18-24	25-34	35-44	45-54	55-64	65+
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15. * What is the average gender group of your tourists by percentage (%)?

Male	Female
------	--------

16. * What is the estimate **number** of visitors annually?

Local	International	Day visitors	Overnight visitors	Average nights of overnight visitors

17. * Please specify the top three places locally by town/region and internationally by country:

Local _____
International _____

18. * Please indicate the average spend per visitor per day:

Local	International
R	R

19. * (OPTIONAL) Please indicate average spend on marketing annually.

R

20. * Please indicate the most frequent way that visitors hear about your brand.

Please rank from 1-8 (1 being the most frequent and 8 the least).

Advertisement <input type="checkbox"/>	Wine route <input type="checkbox"/>	Tourism board <input type="checkbox"/>	Brochure <input type="checkbox"/>	Media <input type="checkbox"/>	Social media <input type="checkbox"/>	Word of mouth <input type="checkbox"/>	Website <input type="checkbox"/>
---	--	---	--------------------------------------	-----------------------------------	--	---	-------------------------------------

E) Services offered

21. *Do you have the following on the farm?	Yes
Specific sales area	
Tasting and sales only by appointment	
Trained sales and tasting staff	
Wine auctions	
Delivery facilities for wine purchases	
Mail order sales	
Internet sales	
Sell wine internationally to companies	
Sell wine internationally to private clients	
A wine club	
A loyalty programme	
22. * Are the following services provided on your farm?	Yes
Cash accepted	
Credit cards accepted	
Debit cards accepted	
Bus tours welcome	
Disabled access	
Group bookings (please indicate your max size)	Size

23. * Do you encourage environmentally responsible farming practices at the farm? If YES, how? _____

24. * Do you encourage social development projects for the employee and their family members at the farm? If YES, how? _____

Thank you for your participation

APPENDIX B: VISITOR QUESTIONNAIRE SURVEY

1. Please indicate your gender:

Male	Female
------	--------

2. Please indicate your age group:

16-24	25-34	35-44	45-54	55-64	65+
-------	-------	-------	-------	-------	-----

3. Where are you from? _____

4. Are you a day visitor or overnight visitor? _____

If overnight, how many nights? _____

5. Have you visited a wine region before? If Yes, which one? _____

6. How likely would you take a holiday based around wine tourism activities?

Very unlikely	Unlikely	Unsure	Likely	Very likely
---------------	----------	--------	--------	-------------

7. How likely would you return to any wine region you have previously visited?

Very unlikely	Unlikely	Unsure	Likely	Very likely
---------------	----------	--------	--------	-------------

8. Which South African wine region would you say is your favourite to visit? _____

9. What is it about this region that appeals to you?

Scenery/Natural beauty	Good wine/wineries	Accessibility	Good service/professional
Food/restaurant	Other activities to do	Relaxing/peaceful	Historical aspects

Other:

10. What tourism activities did you undertake while on your trip?

Wine tasting	Wine tour	Eat at a restaurant	Attend a wedding	Walking/hiking	Attend a festival	Attend a concert	Shopping
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11. How much did you spend during your trip (including accommodation, food, entertainment etc.)?

Less than R200	R200-R500	More than R500
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12. How would you rate South Africa's wine tourism experience from 1-5? 5 being the highest.

1	2	3	4	5
---	---	---	---	---

13. How did you hear about the wine farm/region or wine tourism experience?

Word of mouth	Social media	Website	Brochure	Tourism board	Media	Advert	Travel agent
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APPENDIX C: COVERING LETTER

Dear

South Africa needs a dynamic wine tourism marketing strategy and plan that will unite the wine tourism industry behind a common vision as well as positioning South Africa as a leading wine tourism destination in the world, defined for our quality of product and the unique diversity of experiences.

Destinate is working with VinPro and Stellenbosch University to determine the impact and potential of wine tourism. For this research we need to assess the current wine tourism industry and market trends and provide a detailed report on findings with recommendations. The first pilot study has already commenced. The aim of the study is to complete the database and to attract as many wine farms/estates in South Africa to participate in the study.

This information will enable us to develop a strategic plan for the further development and promotion of the wine tourism sector in South Africa.

The attached questionnaire will provide us with a ‘snap shot’ picture of the wine tourism related infrastructure on each farm, the value of the wine tourism industry as employer; the financial contribution to the local economy, current marketing methods and any other special attractions to a specific farm (or route). This project is supported by the Provincial Department of Economic Development and Tourism, Wesgro and Wines of South Africa (WOSA) and conducted in association with the University of Stellenbosch.

Please could you be so kind as to complete this questionnaire. We would really appreciate it, if every wine farm on our wine routes could participate in this national census and be part of the first national research on wine tourism. Please take note that the questionnaire will be completely anonymous and any sensitive/financial questions can however be skipped. The information gathered from this study will form part of a MA in Geography and Environmental Studies degree at the University of Stellenbosch.

Please find attached the survey to be completed by latest **Wednesday, 26 August 2015**.

By following this link, you can also find the survey on Survey Monkey: https://www.surveymonkey.com/s/destinate_wine. The questionnaire will only take 15 minutes of your time. Your input in this research will be highly valued. I will liaise with you directly on a regular basis to check on progress and assist with any uncertainties.

Kind regards

Caitlin Hunter, Prof Sanette Ferreira and Mariette du Toit-Helmbold

Geagte

Suid-Afrika benodig 'n dinamiese wyntoerisme bemarkingsstrategie en plan, wat die wyntoerisme industrie sal verenig deur 'n gemeenskaplike visie sowel as die posisionering van Suid-Afrika as een van die voorkeur wyntoerisme bestemmings van die wêreld, bekend vir 'n kwaliteit produk en 'n verskeidenheid van unieke ervarings.

Destinate werk saam met VinPro en die Universiteit van Stellenbosch om die impak en potensiaal van wyntoerisme in Suid-Afrika te bepaal. Vir hierdie studie word die huidige stand van die wyntoerisme industrie en die bemarkings tendense ondersoek en lewer ons 'n volledige verslag met aanbevelings. Die doel van die studie is om 'n databases te voltooi deur om soveel moontlik wynplase te betrek om aan die studie deel te neem.

Hierdie inligting sal ons in staat stel om 'n strategiese plan vir die wyntoerisme sektor van Suid-Afrika te ontwikkel.

Die aangehegde vraelys sal ons voorsien van die huidige 'prentjie' rondom die stand van wyntoerisme infrastruktuur op elke wynplaas, die rol van die wyntoerisme industrie as werkgewer; die finansiële bydrae tot die plaaslike ekonomie; huidige bemarkings metodes en enige ander spesiale 'attraksies' op 'n spesifieke plaas (of roete). Hierdie projek vind plaas in samewerking met individuele plaaseienaars, wynroete bestuurders, WOSA lede, Destinate, Universiteit van Stellenbosch en ander wyntoerisme belanghebbendes. Ons stel u terugvoering hoog op prys!

Sal u asseblief so gaaf wees om hierdie vraelys te voltooi. Dit sal tenvolle waardeer word as elke wynplaas op ons wynroetes sal deelneem aan hierdie nasionale sensus end deel wees van die eerste nasionale navorsingprojek oor wyntoerisme. Neem asseblief kennis dat die vraelyste ten alle tye anoniem gehou sal word en al die sensitiewe/finansiële vrae kan uitgelos word. Hierdie studie al egter deel vorm van 'n MA in Geografie en Omgewingstudie graad by die Universiteit van Stellenbosch.

Vind aangeheg die vraelys wat teen laaste, **Woensdag, 26 Augustus 2015**, voltooi moet word. Deur die volgende skakel te volg, kan u die vraelys op Survey Monkey ook kry: https://www.surveymonkey.com/s/destinate_wine. Die vraelys sal slegs 15 minute van u tyd neem. U insette in die studie word hoog geag. Ek, Caitlin Hunter, sal direk met u in kontak wees en sal daaglik inloer op u vordering en help met enige onduidelikhede.

Vriendelike groete

Caitlin Hunter, Prof Sanette Ferreira and Mariette du Toit-Helmbold

APPENDIX D: COMPLETE DEVELOPMENT SCORE LIST

Number	Wine routes	Name	Total
1	Franschhoek	Grande Provence Heritage Wine Estate	66
2	Franschhoek	Allée Bleue	64
3	Constantia	Groot Constantia	64
4	Stellenbosch	Lanzerac Wine estate	63
5	Franschhoek	Babylonstoren	62
6	Worcester	Leipzig	59
7	Tulbagh	Montpellier	59
8	Franschhoek	Rickety Bridge	58
9	Stellenbosch	Dornier	58
10	Breedekloof	Opstal Estate	58
11	Stellenbosch	Mooiplaas Wine Estate & Private Reserve	57
12	Paarl	Backsberg Estate Cellars	56
13	Stellenbosch	Delaire Graff Estate	55
14	Constantia	Steenberg Vineyards	54
15	Durbanville	D'Aria Winery	54
16	Wellington	Diemersfontein Wine & Country Estate	53
17	Stellenbosch	Neethlingshof	51
18	Stellenbosch	Stellenrust	51
19	Stellenbosch	Asara	50
20	Durbanville	Bloemendal	50
21	Franschhoek	Anthonjj Rupert	50
22	Franschhoek	Vrede and lust	49
23	Stellenbosch	Hartenberg	49
24	Paarl	Vendôme	49
25	Tulbagh	Waverly Hills	49
26	Stellenbosch	De Meye	48
27	Franschhoek	Franschhoek Cellar	47
28	Durbanville	De Grendel Wines	47
29	Durbanville	Meerendal	47

30	Robertson	Rosendal Winery & Wellness Retreat	47
31	Stellenbosch	Clos Malverne	46
32	Durbanville	Durbanville Hills	46
33	Stellenbosch	Lourensford	46
34	Stellenbosch	Simonsig	46
35	Franschhoek	La Motte	46
36	Elgin	Lothian Vineyards	46
37	Paarl	Spice Route	46
38	Klein Karoo	Herold Wines	45
39	Stellenbosch	Knorhoek	45
40	Constantia	Silvermist	45
41	Franschhoek	Dieu Donné	44
42	Namaqua West Coast	Namaqua Wines	44
43	Stellenbosch	Muratie	42
44	Franschhoek	Chamonix	42
45	Bot River	Wildeckrans Wine Estate	42
46	Wellington	Doolhof	41
47	Paarl	Rhebokskloof	41
48	Wellington	Welbedacht	41
49	Constantia	Beau Constantia	41
50	Wellington	Dunstone	41
51	Franschhoek	Franschhoek farm	41
52	Hermanus	La Vierge	40
53	Robertson	Viljoensdrift	40
54	Franschhoek	Glenwood	40
55	Elgin	South Hill Vineyards	40
56	Stellenbosch	Stellenbosch Hills	40
57	Paarl	Mellasad	39
58	Paarl	Under Oaks	39
59	Worcester	Overhex Winery & Bistro	39
60	Franschhoek	Plaisir de Merle	39

61	Stellenbosch	Remhoogte	39
62	Hermanus	Sumaridge	39
63	Constantia	Constantia Glen	38
64	Namaqua West Coast	Teubes Family Wines	38
65	Stellenbosch	Slaley	38
66	Swartland	Allesverloren	37
67	Stellenbosch	Uitkyk	37
68	Stellenbosch	Vergenoegd	37
69	Robertson	Wolvendrift	37
70	Stellenbosch	Le Bonheur	36
71	Swartland	Pulpit rock	36
72	Namaqua West Coast	Lutzville Vineyards	36
73	Elgin	Shannon vineyards	35
74	Robertson	Rietvallei	35
75	Elgin	Winter's Drift	35
76	Paarl	Winedmeul Kelder	35
77	Stellenbosch	L'Avenir	35
78	Stellenbosch	High Road Winery	34
79	Elgin	Highlands Road	34
80	Elgin	Almenkerk	34
81	Breedekloof	Badsberg Cellar	33
82	Stellenbosch	Fleur de Cap (Bergkelder)	33
83	Stellenbosch	Jordan Wine estate	33
84	Stellenbosch	Bilton Wines	33
85	Plett	Bramon Wine Estate	33
86	Stellenbosch	Alto	32
87	Swartland	Annex Kloof Wines	32
88	Stellenbosch	Beau Belle Wines	32
89	Stellenbosch	Delheim	32
90	Stellenbosch	Morgenster	32
91	Durbanville	Nitida	32

92	Worcester	Aan de doorns	31
93	Robertson	Fraai Uitzicht	31
94	Durbanville	Signal Gun	31
95	Stellenbosch	Goede Hoop	31
96	Robertson	Ashton Cellar	31
97	Breedekloof	Du Toitskloof	31
98	Tulbagh	Saronsberg	31
99	Stellenbosch	Avontuur	30
100	Franschhoek	Eikehof	30
101	Stellenbosch	Ken Forrester	30
102	Constantia	Eagle's Nest	30
103	Franschhoek	La Couronne Wine Estate	30
104	Franschhoek	Le Manoir de Brendel	30
105	Robertson	Esona	29
106	Stellenbosch	Mulderbosch	29
107	Robertson	Ashton Kelder	29
108	Elgin	Oak Valley	29
109	Worcester	Willow Creek Olive Estate	29
110	Bot River	Luddite	29
111	Stanford	Stanford Hills Estate	29
112	Stellenbosch	Waterford Estate	29
113	Stellenbosch	Kanonkop	28
114	Stellenbosch	Peter Falke	28
115	Paarl	Arra Vineyards	28
116	Stellenbosch	Audacia	27
117	Paarl	Tempel	27
118	Paarl	Ridgeback	27
119	Robertson	Rooiberg	27
120	Stellenbosch	Tokara	27
121	Robertson	Robertson farm	26
122	Namaqua West Coast	Fryers Cove Vineyards	26

123	Stellenbosch	Neil Ellis	26
124	Franschhoek	Topiary	26
125	Robertson	Esona Boutique	25
126	Durbanville	Hillcrest Estate	25
127	Swartland	Riebeeck Cellars	25
128	Stellenbosch	Stellenbosch Vineyards	25
129	Stellenbosch	Villiera	25
130	Bot River	Benguela Cove	25
131	Franschhoek	Lynx wines	25
132	Swartland	Swartland Winery	24
133	Robertson	Arendsig	24
134	Stellenbosch	Bartinney Wines	24
135	Durbanville	Diemersdal	24
136	Stellenbosch	Uva Mira	24
137	Hermanus	Hamilton Russell Vineyards	23
138	Stellenbosch	Kleinood	23
139	Tulbagh	Rijks Cellar	23
140	Worcester	Conradie Penhill wines	23
141	Stellenbosch	Lievlund Wine estate	23
142	Stanford	Raka Wine	23
143	Robertson	Janharmgat	23
144	Elgin	Paul Wallace	23
145	Robertson	Excelsior	22
146	Hermanus	Newton Johnson	22
147	Stellenbosch	Yonderhill	22
148	Hermanus	Buchard Fynlayson	22
149	Namaqua West Coast	Seal Breeze	22
150	Stellenbosch	Laibach Organic Wines & Vineyards	21
151	Bot River	Barton Vineyards	21
152	Stellenbosch	Meerlust	21
153	Tulbagh	Drostdy	21

154	Franschhoek	Four Paws Wines	20
155	Robertson	Robertson farm	20
156	Stellenbosch	Warwick	20
157	Namaqua West Coast	Cederberg Private Cellar	20
158	Breedekloof	UniWines	20
159	Robertson	Graham Beck	19
160	Robertson	Tanagra	19
161	Stellenbosch	Oldenburg Vineyards	19
162	Stellenbosch	Ernie Els	18
163	Swartland	Het Vlock Casteel	18
164	Plett	Newstead	18
165	Robertson	Springfield	18
166	Worcester	Cilmor	18
167	Breedekloof	Deetlefs Estate	18
168	Franschhoek	Holden Manz	18
169	Robertson	Olive Marbin	18
170	Robertson	Van Loveren	17
171	Klein Karoo	Axe Hill	17
172	Robertson	Roodezandt Co-operative Winery	17
173	Elgin	Sonoita Vineyards	16
174	Bot River	Gabriëlskloof	16
175	Stellenbosch	Rainbow's End	16
176	Stanford	Sir Robert Stanford	16
177	Stellenbosch	Summerhill	16
178	Stellenbosch	Botanica Wines	16
179	Stellenbosch	Eikendal	16
180	Franschhoek	Haute Cabrière	16
181	Plett	Kay and Monty Vineyards	16
182	Wellington	Napier Winery	16
183	Breedekloof	Botha Cellar	15
184	Namaqua West Coast	Tierhoek	15

185	Robertson	Van Zylshof	15
186	Plett	Packwood Wine Estate	15
187	Darling	Groote Post Vineyards	15
188	Tulbagh	Tulbagh Winery	15
189	Robertson	Zandvliet	15
190	Paarl	Druk-my-Niet Wines	14
191	Stellenbosch	Kaapzicht	14
192	Elgin	Paul Cluver	14
193	Robertson	Bonnievale Cellars	14
194	Swartland	Olive Boutique	14
195	Tulbagh	Twee Jonge Gezellen	14
196	Plett	Redfordlane	13
197	Stellenbosch	Overgaauw	13
198	Stellenbosch	Thelema Mounatin Vinayards	13
199	Wellington	Bosman Family Wines	13
200	Elgin	Spioenkop	13
201	Wellington	Jorgen's Distillery	12
202	Paarl	Mitre's Edge	12
203	Namaqua West Coast	Desert Rose Wines	12
204	Namaqua West Coast	Rosslo Wines	12
205	Robertson	Bushmanspad	12
206	Darling	Cloof Wine Estate	12
207	Stellenbosch	Le Riche	12
208	Stellenbosch	Rustenberg	12
209	Breedekloof	Slanghoek Cellar	12
210	Durbanville	Groot Phisantekraal	11
211	Plett	Lodestone Wines	11
212	Elgin	Arumdale	11
213	Robertson	Langverwacht cellar	10
214	Stellenbosch	Stellenbosch winery	10
215	Robertson	Windfall Wine	10

216	Namaqua West Coast	Klawer Wine Cellar	10
217	Stanford	Walker Bay Winery	10
218	Paarl	Perdeberg	10
219	Robertson	Windfall Wine Farm	10
220	Paarl	Bowwood	9
221	Stanford	Boschrivier Wine Estate	9
222	Franschhoek	La Bri	9
223	Stanford	Lomond wines	9
224	Stanford	The Drift farm	9
225	Stellenbosch	Clouds	9
226	Robertson	Kranskop	9
227	Breedekloof	Merwida	9
228	Paarl	Nederburg	9
229	Stellenbosch	Stellenzicht	9
230	Breedekloof	Breedekloof farm	8
231	Swartland	AA Badenhorst Family Wines	8
232	Plett	Anderson Wines	8
233	Wellington	Andreas Wines	8
234	Namaqua West Coast	Bellpost	8
235	Robertson	Bon Courage	8
236	Klein Karoo	Karusa	8
237	Wellington	Wonderfontein	8
238	Namaqua West Coast	Cape Rock	8
239	Breedekloof	Eengevonden	8
240	Swartland	Sadie Family Wines	8
241	Stellenbosch	Groenland	7
242	Namaqua West Coast	Vleiland	7
243	Namaqua West Coast	Wilgenhof Wines	7
244	Breedekloof	Bergsig Estate	7
245	Klein Karoo	Du'Swaroo	7
246	Darling	Earthbound	7

247	Robertson	Goedverwacht	7
248	Stellenbosch	Keermont	7
249	Worcester	Stettyn	6
250	Robertson	Mooiuitsig	6
251	Robertson	Arabella	6
252	Stellenbosch	De Toren Private cellar	6
253	Robertson	De Wetshof	6
254	Wellington	Napier	6
255	Stellenbosch	Lyingrove	5
256	Wellington	Val du Charron Wines	5
257	Worcester	Brandvlei Kelder	5
258	Stellenbosch	Kloovenburg	5
259	Wellington	Linton Park Wines	5
260	Stellenbosch	Koopmanskloof	4
261	Stellenbosch	Aaldering Vineyards & Wines	3
262	Darling	Ormonde Cellars	3
263	Breedekloof	Lateganskop Cellar	3
264	Paarl	Zandwijk	3
265	Klein Karoo	Akkerboom	3
266	Breedekloof	Olifantsberg Wines	3
267	Klein Karoo	Peter Bayly	3
268	Hermanus	Atraxia	3
269	Hermanus	Ashbourne	3
270	Klein Karoo	Alfresco deli	2
271	Stellenbosch	Annandale Distillers & Vintners	2
272	Franschhoek	GM & Ahrens	2
273	Stellenbosch	Heron Ridge	2
274	Franschhoek	La Galiniere	2
275	Swartland	Mullineux	2
276	Paarl	Painted Wolf Wines	2
277	Breedekloof	TCB Wines	2

278	Paarl	The Mason's Winery	2
279	Franschhoek	Montagne	2
280	Stellenbosch	Amani	1
281	Klein Karoo	De Krans	1
282	Klein Karoo	Doornkraal	1
283	Durbanville	Maison de Tijger	1
284	Worcester	BC Wines	1
285	Franschhoek	Black Elephant Vintners	1
286	Stellenbosch	Bonfoi	1
287	Stellenbosch	Cape Hutton	1
288	Franschhoek	Colmant Cap Classique & Champagne	1
289	Worcester	De Wet Cellar	1
290	Hermanus	Domaine des Dieux	1
291	Bot River	Feiteiras Wines	1
292	Paarl	Freedom Hill	1
293	Stellenbosch	Helderberg Wijnmakerij	1
294	Namaqua West Coast	Cape Rock Wines	1
295	Wellington	Klein Optenhorst	1
296	Paarl	De Zoete Inval Wine Estate	1
297	Robertson	Majors Hill	1
298	Robertson	McGregor	1
299	Stellenbosch	Haskell Vineyards	1
300	Robertson	Nordic Wines	1
301	Paarl	Nelson Wine Estate	1
302	Swartland	Porseleinberg	1
303	Durbanville	Russo Wines	1
304	Klein Karoo	Sir Lambert	1
305	Franschhoek	Le Petite Vigne	1
306	Swartland	Babylon's Peak	1
307	Franschhoek	La Bourgogne	1
308	Stellenbosch		1

309	Breedekloof	Waboomsrivier Wine Cellar	1
310	Klein Karoo	SoetKaroo Wine estate	1
311	Bot River	Eerste Hoop	1
312	Swartland	The Hughes Family Wines	1
313	Paarl	Vondeling	1
314	Paarl	Freedom Hill	1
315	Franschhoek	GH & Ahrens	1
316	Franschhoek	Black Elephant Vintners	1
317	Franschhoek	Akkerdal Wine Estate	1
318	Franschhoek	Véraison Vineyards	1
319	Stellenbosch	Meinert Wines	1