



Cape Winelands Tourism Visitor Trends

January to December 2024

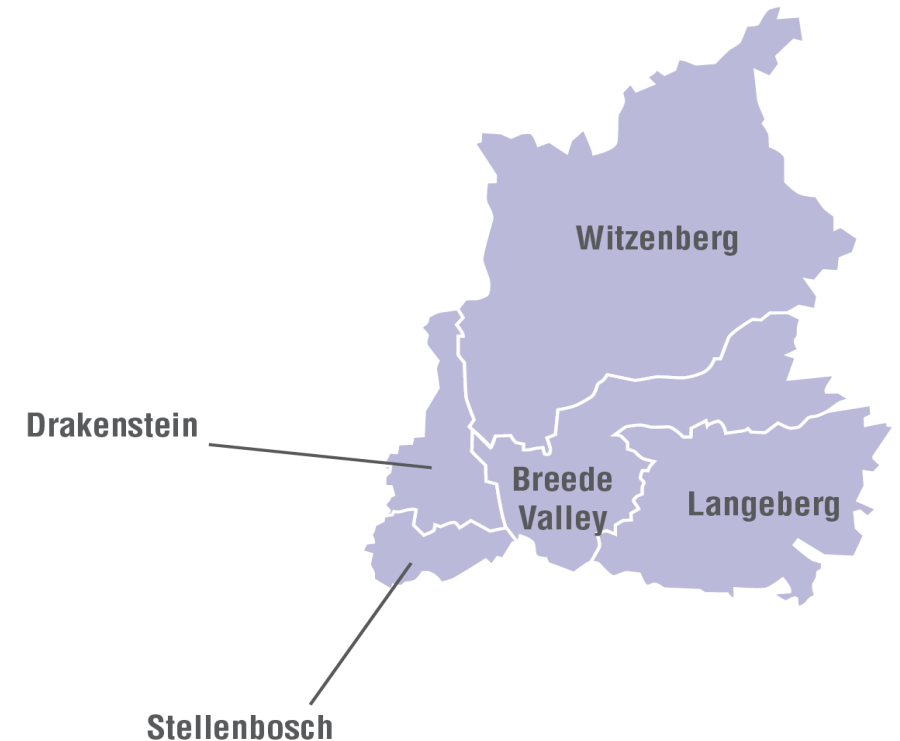
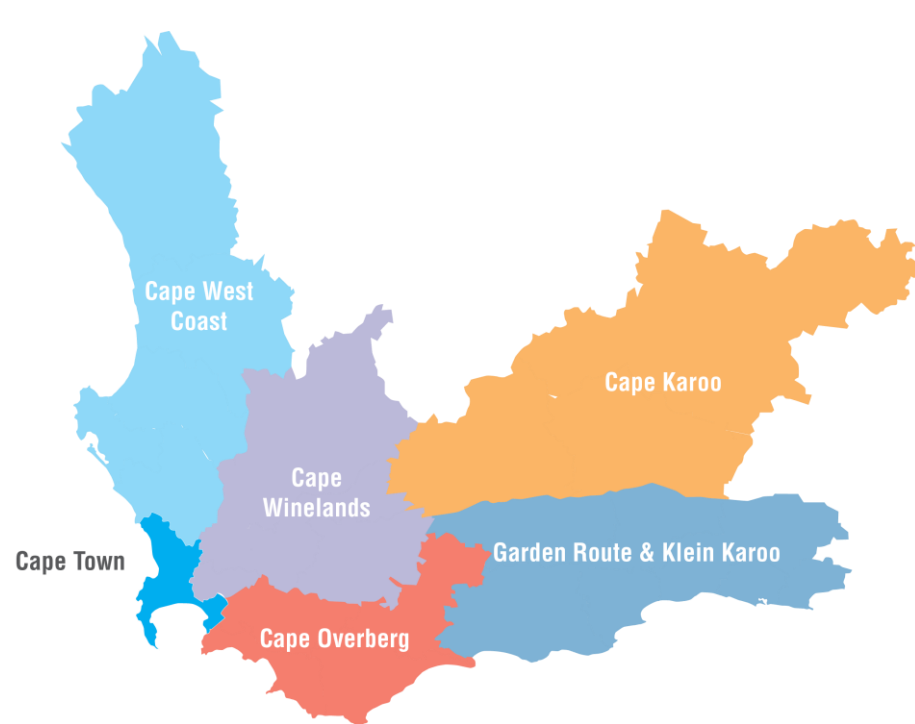
Contents

| Section |
|--|
| 1. About this Report |
| 2. Methodology |
| 3. Sample Size |
| 4. Key Insights |
| 5. Winelands Visitor Trends & Patterns |
| 6. Visitor Trends & Patterns by Town's Available |
| 7. Langeberg Visitors & Attractions |
| 8. Stellenbosch Wine Valley Route |
| 9. Cape Nature Reserves |
| 8. Acknowledgements |

1. About this Report

This report provides an overview of the latest data from local tourism offices in the Cape Winelands between January and December 2024.

The information provides insights into the origin of visitors in the region as well as their preferred activities, ages, group sizes and spending patterns. The research is not intended to represent tourism for the region, as the sample of visitors represents the footfall at only participating tourism offices.



2. Methodology

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

Responses to the regional visitor tracking surveys are used as a proxy to indicate the key trends in the Western Cape and the various regions. It is important to note that absolute figures cannot be determined from these surveys, as the survey responses are a sample of the responses from tourists in the respective tourism offices across the Western Cape and would thus represent a sample of the visitors. Therefore, where statistically relevant, absolute numbers may be given; however, a share is provided to indicate the trend. This is based on international best practice in the use of surveys in the tourism industry for determining key trends (Wesgro Regional Visitor Tracking Survey, 2024).

Definition

Visitor: Any person travelling to a place other than his/her usual environment for less than 12 months and whose main purpose for the travel is other than the exercise of an activity to be remunerated at the place visited (South Africa Tourism, 2025).

3. Sample Size

Between January and December 2024, a total of 2,122 responses to the regional visitor tracking surveys were received from the towns of Ceres, Paarl and Tulbagh in the Cape Winelands. This is indicated in Table 1.

Table 1: Total number of responses from visitors to three towns in the Cape Winelands, between January and December 2024

| Towns | Domestic Visitors | Overseas Visitors | Total |
|------------|-------------------|-------------------|-------|
| 1. Ceres | 1 483 | 167 | 1 651 |
| 2. Paarl | 214 | 83 | 297 |
| 2. Tulbagh | 103 | 71 | 175 |
| Total | 1 801 | 322 | 2 123 |

Source: Wesgro Regional Visitor Tracking Survey, 2024

4. Key Insights

- The information provided in the report is obtained from the visitor tracking surveys distributed by Wesgro to tourism offices in the Cape Winelands, namely Paarl, Tulbagh and Ceres.
- **Visitor segment and origin:** Between January and December 2024, 84.83% of visitors to the Cape Winelands were domestic, primarily from the Western Cape (72.49%). Overseas visitors accounted for 15.17% of respondents, with the United States (27.02%), UK (20.81%), Germany (18.94%) and the Netherlands (5.90%) being the leading source markets for visitors to the region.
- **Seasonality spread:** March was the month that attracted the most visitors, of whom a high share were from overseas. Other peak months were December (with 255 visitors) and February (with 228 visitors). The months of June, July and August attracted the least number of visitors, many of whom were from overseas.
- **Demographics:** The key age groups among visitors were predominantly elderly, with most being between 51–70 years and those above 70. Many of these visitors traveled either in pairs or independently.
- **Length of stay:** Most visitors (3.96%) stayed for either two nights or for seven nights and longer (3.34%), highlighting the destination's appeal for both short breaks and extended holidays.
- **Information sources:** Most visitors relied on digital platforms, with the internet/websites being the leading sources of information. Some 2.12% of visitors returned to the area and recommendations from friends or family were important channels for 1.41% of visitors.
- **Transportation and accommodation preferences:** Among domestic visitors, 11.27% used their own motor vehicles, while 25.47% of travellers from overseas used rental cars, reflecting a preference for flexibility. When observing visitor accommodation preferences, guesthouses (chosen by 4.85% of visitors) and self-catering establishments (for 2.03% of visitors) were preferred.
- **Visitor spending:** Visitor spending was concentrated in the mid-range categories, with the largest share of visitors (2.31%) spending between R1,001–R2,000, followed by 1.08% of visitors spending R501–R1,000.
- **Purpose of visit:** Most visitors (18.42%) said Leisure and holiday travel was the purpose of their visit to the region.
- **Activities:** Scenic drives, culture/heritage, wine tasting and cuisine were identified as the most popular activities enjoyed across all participating towns in the Cape Winelands region.
- **Attractions:** Visitor data was obtained from CapeNature for the six nature reserves located in the Cape Winelands.
- **Additional information relating to towns in the Langeberg area and Stellenbosch:** The report also highlights attractions in the Langeberg area, showcasing visitor numbers that draw attention to the towns of Robertson, Montagu, and McGregor. In addition, the top points of interest in the Stellenbosch wine valley are explored and listed in the report.

The background of the slide is a scenic photograph of a coastal landscape. In the foreground, the ocean is visible with gentle waves. In the middle ground, there are several mountain peaks, including a prominent, sharp peak on the left. The sky is a pale, hazy blue. The overall tone is serene and natural.

5. Cape Winelands Visitor Trends & Patterns

Wesgro Primary Research: Regional Visitor Tracking Surveys
Review Period: January – December 2024

5. Cape Winelands Visitor Trends & Patterns: Origin of Visitors

- Between January and December 2024, 15.17% of visitors to the Cape Winelands were international visitors, while 84.83% were domestic travellers. This distribution of visitors is illustrated in Figure 1.
- Among domestic visitors, a significant 72.49% originated from the Western Cape. The percentage share of other domestic visitors in the Cape Winelands region is detailed in Figure 2, which shows the influx of tourists from the respective provinces in South Africa.

Figure 1: Overseas and domestic visitors in the Cape Winelands, January–December 2024

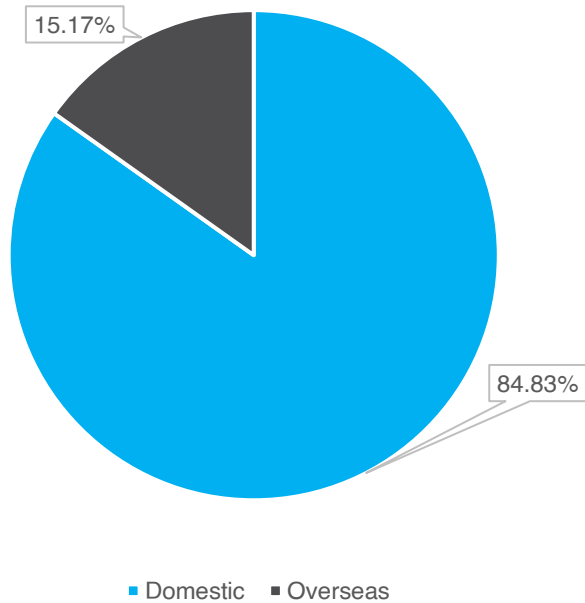
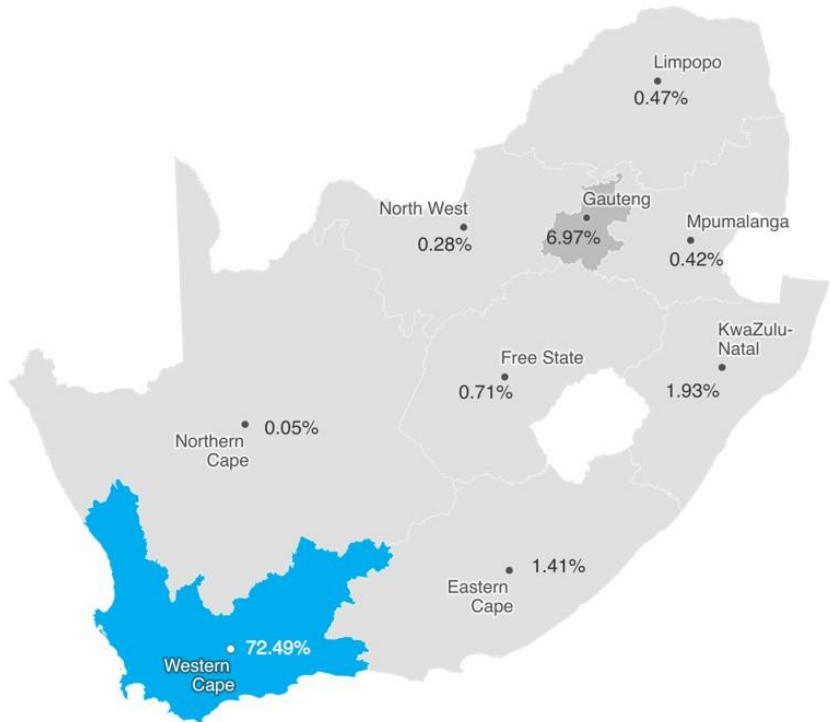


Figure 2: Origin of domestic visitors, visiting the Cape Winelands, January–December 2024



5. Cape Winelands Visitor Trends & Patterns: Source Markets

- According to Figure 3, the greatest share of overseas travellers visiting the Cape Winelands region in 2024 originated from the United States, which accounted for 27.02% of the overseas visitor sample, closely followed by the UK (responsible for 20.81% of visitors) and Germany (for 18.94% of visitors).
- The Netherlands, with 5.90% of visitors from this country, was in fourth place, followed by France which accounted for 2.80% of the international visitors to the Cape Winelands. This shows that the source markets for the majority of international arrivals in the Cape Winelands were dominated by European nations.

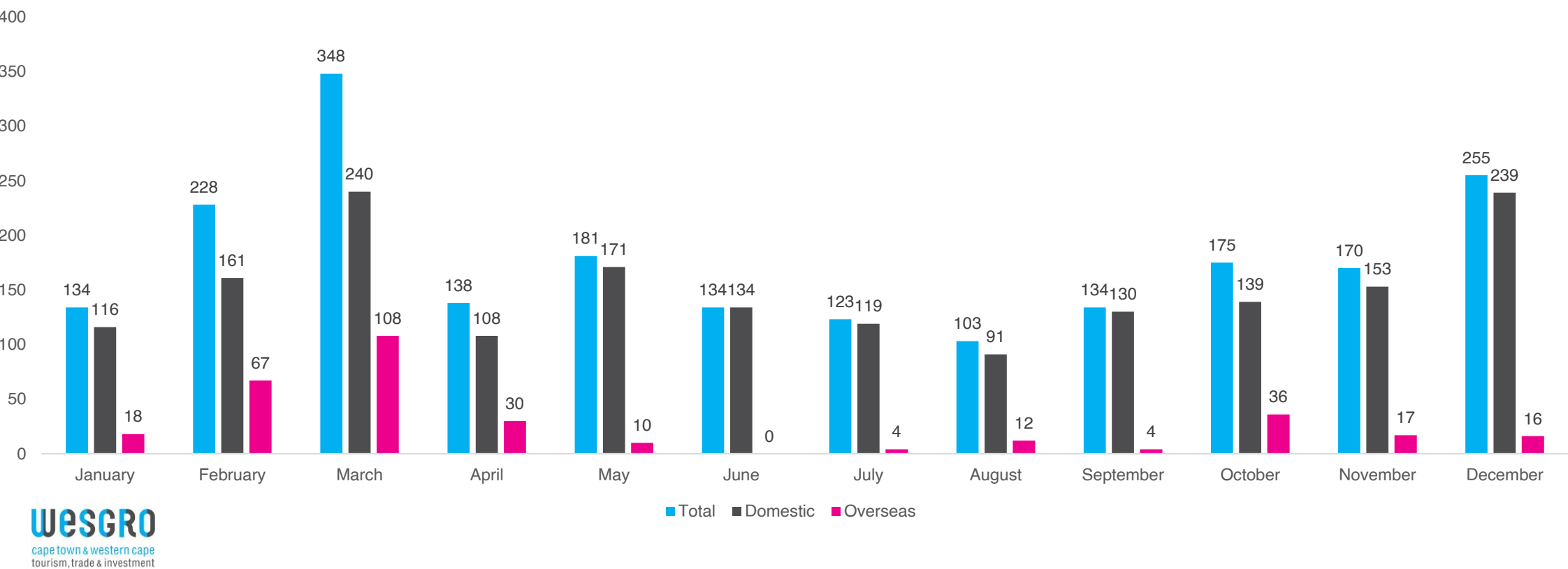
Figure 3: Origin of overseas visitors to the Cape Winelands, January–December 2024



5. Cape Winelands Visitor Trends & Patterns: Seasonality

- Figure 4 illustrates the seasonality trends of visitor arrivals in the Cape Winelands region. The highest volumes were recorded in March with 348 visitors; February with 228 visitors; and December with 255 visitors, reflecting peak travel periods influenced by both domestic holidays and international interest.
- The lowest numbers of arrivals occurred in August with (103 visitors) and July with (123 visitors), indicating a distinct off-peak winter season, with no international arrivals recorded in June.

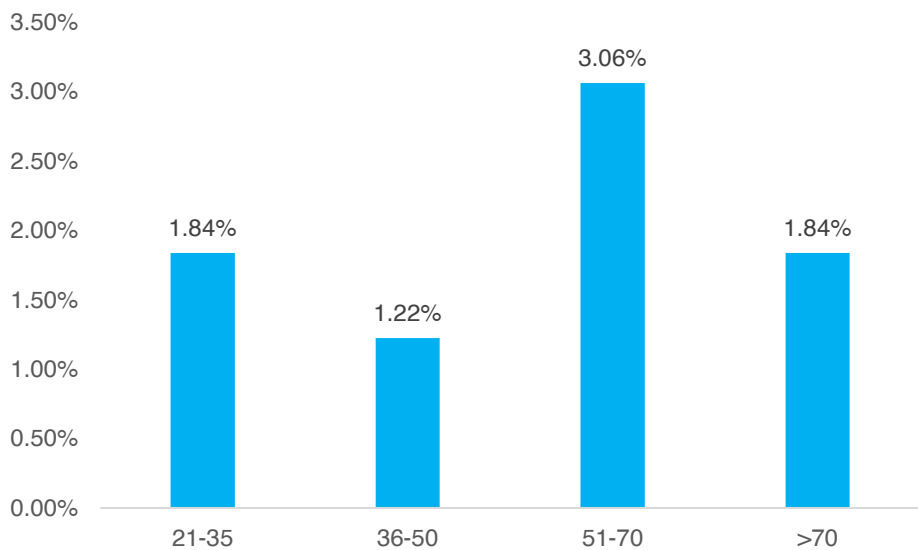
Figure 4: Seasonality spread of visitors to Local Tourism Offices in the Cape Winelands, January–December 2024



5. Cape Winelands Visitor Trends & Patterns: Demographics

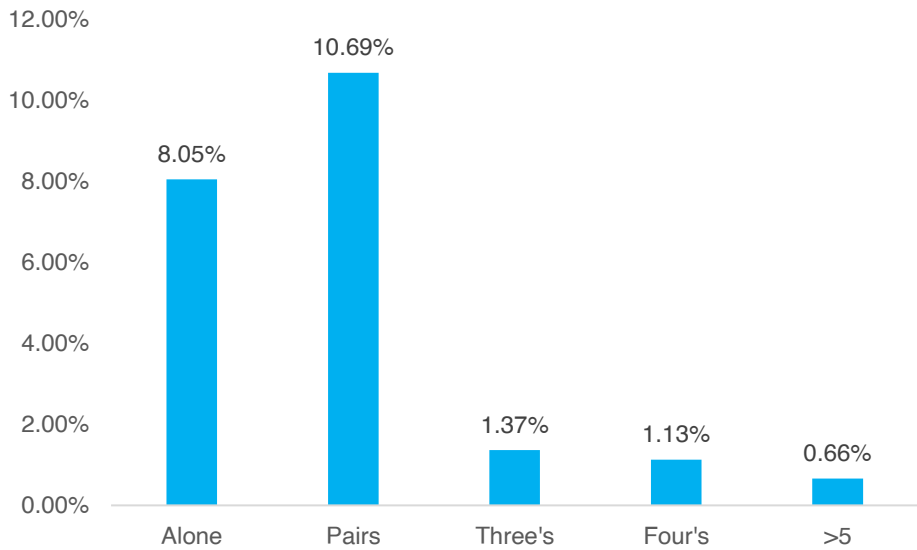
- Figure 5 provides an overview of visitor demographics in the Cape Winelands region in 2024 and shows that most visitors could be categorised in three distinct age groups: 21–35, 36–50, and 51–70 years. These categories were notably the most represented among those who explored the region, highlighting its appeal to a diverse array of visitors.
- Regarding travel group size, the data reveals that a significant portion of visitors preferred to travel in pairs (10.69%) followed by solo travellers (8.05%). Smaller proportions were recorded for groups of three (1.37%), groups of four (1.13%), and groups of five or more (0.66%). This can be seen in Figure 6.

Figure 5: Age groups of visitors, January–December 2024



Source: Wesgro Visitor Tracking Survey, 2024

Figure 6: Travel group sizes of visitors, January–December 2024



Source: Wesgro Visitor Tracking Survey, 2024

5. Cape Winelands Visitor Trends & Patterns: Length of Stay



- According to Figure 7, the most visitors (3.96%) travelling to the Cape Winelands were overnight visitors, with an average stay of two nights followed by those staying for seven nights or more (3.34%). This pattern suggests that the Cape Winelands primarily attracts short-stay visitors, likely weekend or leisure travellers, while another division consists of long-stay visitors who combine the Winelands with broader regional travel in the surrounding regions.
- Figure 8 illustrates the types of accommodation used by both domestic and international visitors. The data reveals that a significant proportion of travellers (4.85%) chose guesthouses, followed by those who opted for hotels (3.58%) and self-catering establishments. This preference for guesthouses and self-catering options suggests that many visitors to the Cape Winelands value a more personalised and flexible accommodation experience, while hotels remain an important choice for those seeking full-service facilities.



Figure 7: Average length of stay in the Cape Winelands region, January–December 2024

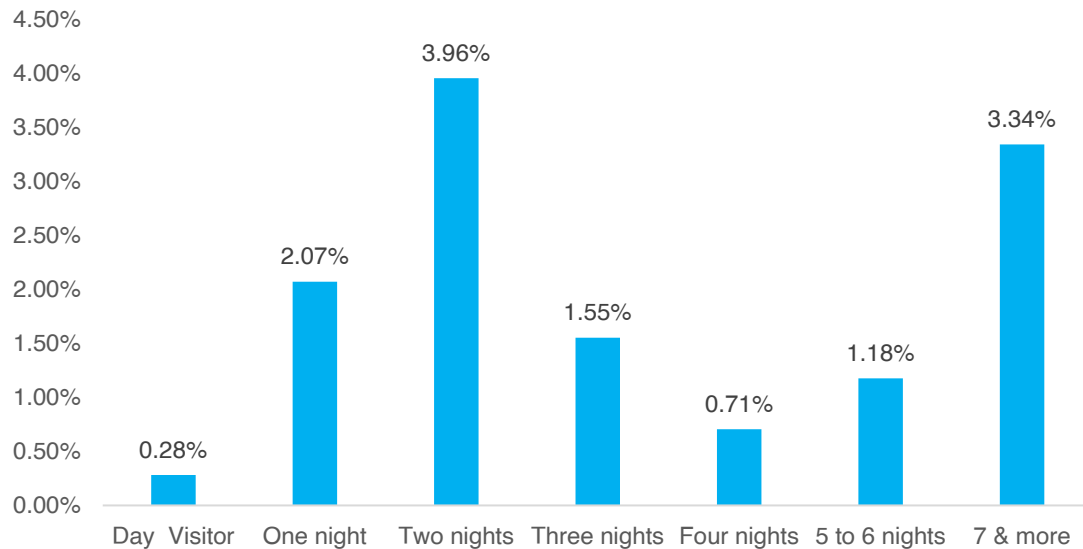
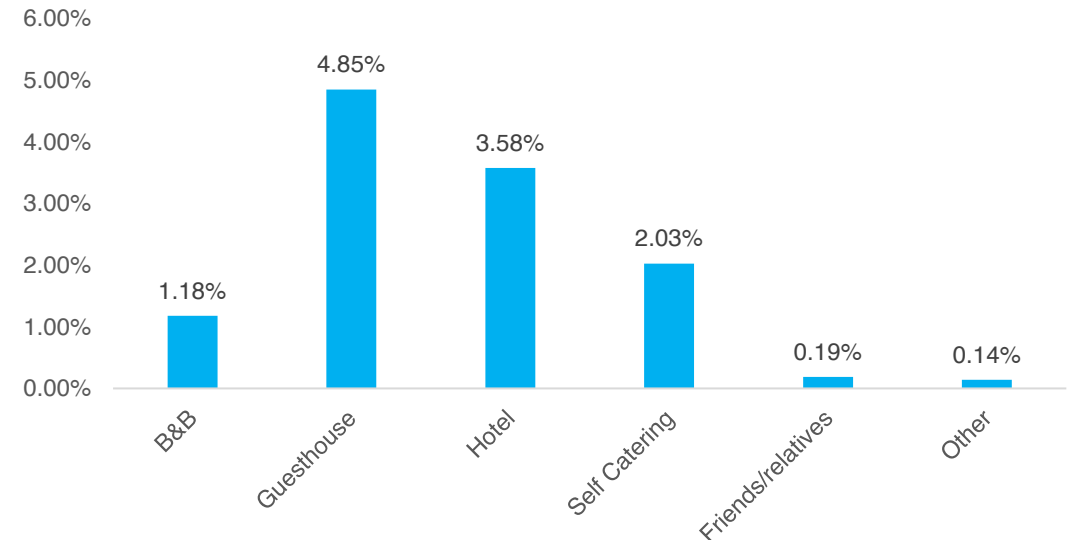


Figure 8: Accommodation usage in the Cape Winelands region, January–December 2024



5. Cape Winelands Visitor Trends & Patterns: Visitor Spending & Information Sources

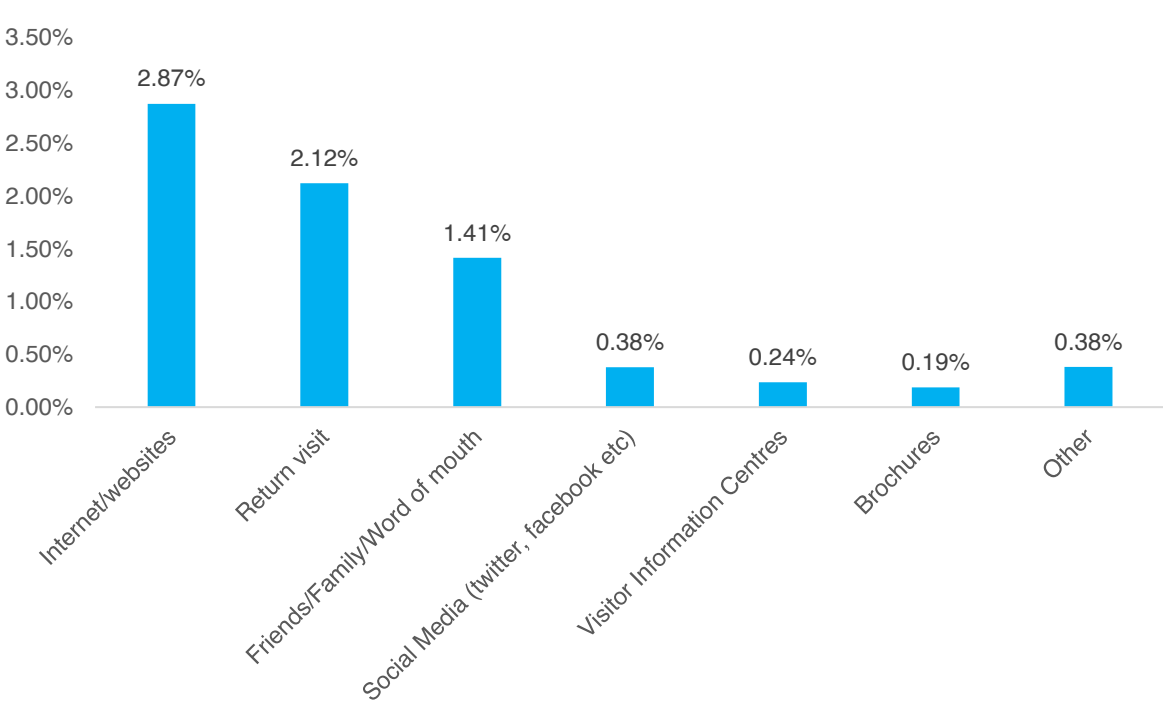
- Figure 9 presents the average daily spend reported by visitors. Some 2.31% of travellers indicated that they spent between R1001 and R2000 per day, while 1.08% reported daily expenditures ranging from R501 to R1000.
- Figure 10 highlights the main information sources used by travellers to the region. The leading sources in 2024 were the internet/websites, return visits, and word of mouth, all of which strongly influenced visitors to explore and engage within the region.

Figure 9: Average daily spend in the Cape Winelands, January–December 2024



Note: 95.85% of the respondents to the survey did not specify their average daily spend.

Figure 10: Top information sources used by visitors in the Cape Winelands, January–December 2024



Note: 92.42% of the respondents to the survey did not specify their top information source.

5. Cape Winelands Visitor Trends & Patterns: Modes of Transport

- Figures 11 and 12 provide insights into transportation preferences among domestic and overseas visitors who travelled to the Cape Winelands.
- Some 11.27% of domestic tourists used their own motor vehicles when visiting the Cape Winelands, while others (3.55%) preferred rented vehicles. Other modes of transport for domestic travellers included mini bus taxis and other forms of public transport.
- Some 25.47% of international visitors opted for rental cars as the most preferred mode of transportation. Surprisingly 14.60% of these travellers also commuted using local mini bus taxis.

Figure 11: Modes of transport used by domestic visitors in the Cape Winelands, January–December 2024

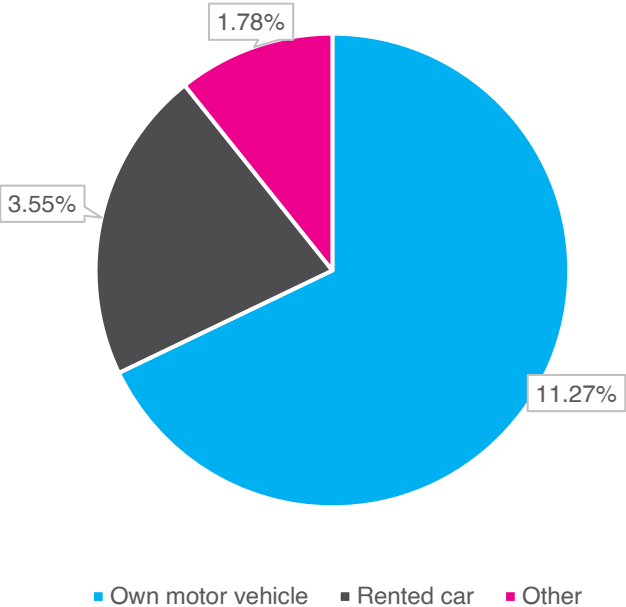
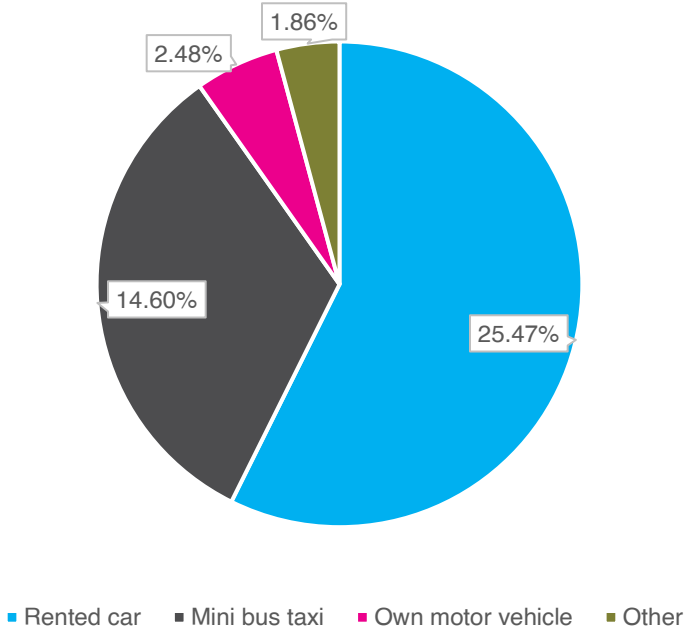


Figure 12: Modes of transport used by overseas visitors in the Cape Winelands, January–December 2024



Note: 79.18% of survey respondents did not specify their preferred mode of transport

5. Cape Winelands Visitor Trends & Patterns: Travel Motivations



- Figure 13 indicates that most tourists visited the region for leisure purposes (18.42%), followed by those who travelled for educational purposes (1.22%).



- Among the variety of activities that tourists engaged in during their stay, several stood out as particularly popular. These included exploration of the region's culture and heritage, together with scenic drives and outdoor activities, not forgetting the delectable wine & cuisine offerings. This is shown in Figure 14.

Figure 13: Purpose of visit to the Cape Winelands, January–December 2024

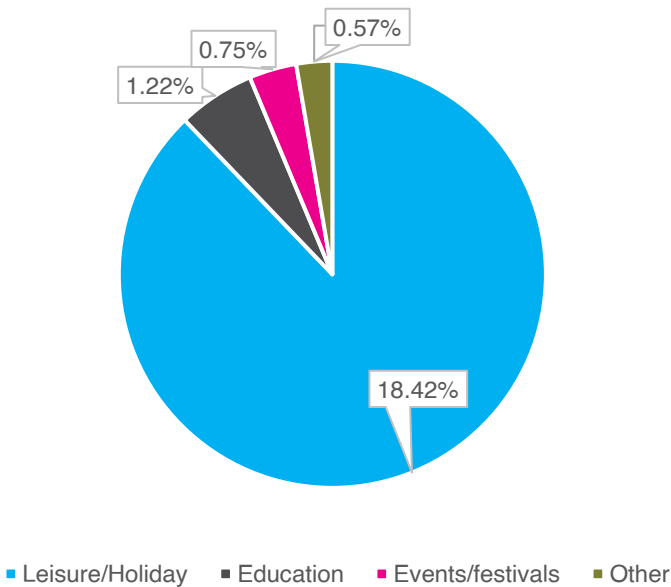
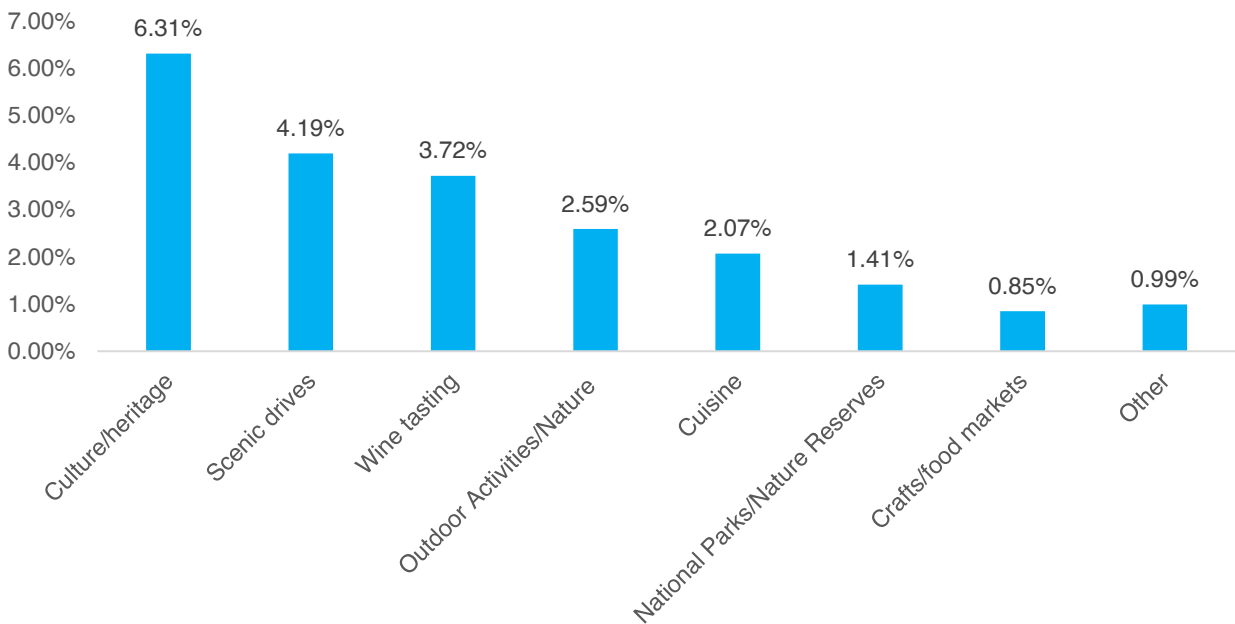


Figure 14: Top activities undertaken by visitors in the Cape Winelands, January–December 2024



6. Visitor Trends & Patterns by Town

Table 1: Overview of visitor trends and patterns by town, January–December 2024

| Tourism indicators | Ceres | Paarl | Tulbagh |
|----------------------------------|---|---|--|
| % Share domestic visitors | 89.88% | 72.05% | 58.86% |
| % Share overseas visitors | 10.12% | 27.95% | 41.14% |
| Top 3 international markets | United States (49.70%) United Kingdom (16.17%) Germany (11.98%) | Germany (32.53%) United Kingdom (25.30%) Netherlands (9.64%) | United Kingdom (26.39%) Germany (19.44%) Netherlands (15.28%) |
| Top 3 domestic markets | Western Cape (80.01%) Gauteng (6.48%) Kwa-Zulu Natal (1.51%) | Western Cape (49.83%) Gauteng (7.07%) Eastern Cape (6.06%) | Western Cape (40.00%) Gauteng (11.43%) Kwa-Zulu Natal (3.43%) |
| Main purpose of visit | Visitors did not specify | Leisure/holiday (75.76%) Education (8.75%) Events/festivals (5.39%) | Leisure/holiday (94.86%) Other (4.00%) Unspecified (1.14%) |
| Age profile of visitors | Visitors did not specify | Visitors did not specify | 21-35 years (22.29%) 51-70 years (37.14%) Above 70 years (22.29%) |
| Group size | Visitors did not specify | Alone (52.19%) Pairs (38.38%) | Alone (9.14%) Pairs (64.57%) |
| Length of stay | Visitors did not specify | 7 & more nights (23.91%) | Two nights (41.71%) Three nights (13.71%) |
| Top 3 information sources | Visitors did not specify | Over 99% of visitors did not specify. | Internet/websites (34.86%) Return Visit (25.71%) Word of mouth (17.14%) |
| Average daily budget | Visitors did not specify | Visitors did not specify | 0-R200 (41.71%) R201-R500 (24.00%) |
| Average budget for accommodation | Visitors did not specify | Visitors did not specify | R501-R1000 (13.14%) R1001-R2000 (28.00%) |
| Type of accommodation | Visitors did not specify | Guesthouses (25.59%) Hotels (14.81%) B&B's (4.71%) | Self Catering (22.86%) Guesthouse (15.43%) Hotel (18.29%) |
| Mode of Transport | Visitors did not specify | Own motor vehicle (41.08%) Rented Car (30.30%) Mini bus taxi (22.90%) | Own motor vehicle (50.86%) Rented car (32.00%) Tour Bus (1.71%) |
| Top 3 activities undertaken | Visitors did not specify | Over 80% of visitors did not specify | Culture/heritage (70.86%) Scenic drives (46.86%) Outdoor activities (44.00%) |



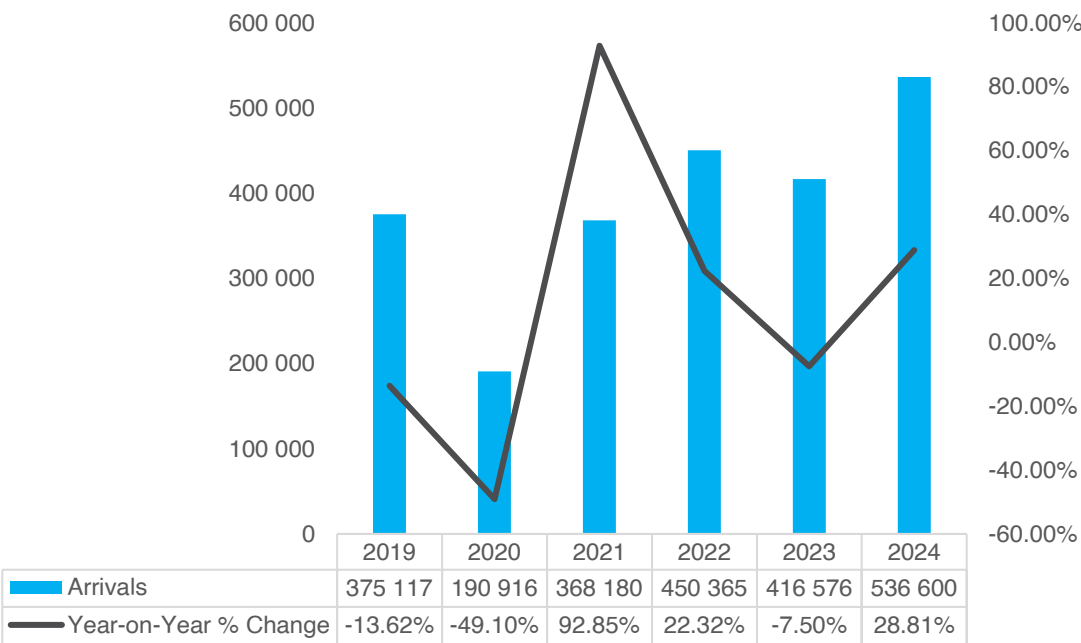
Langeberg Visitors & Attractions

Review Period: January – December 2024

7. Langeberg Visitor Trends

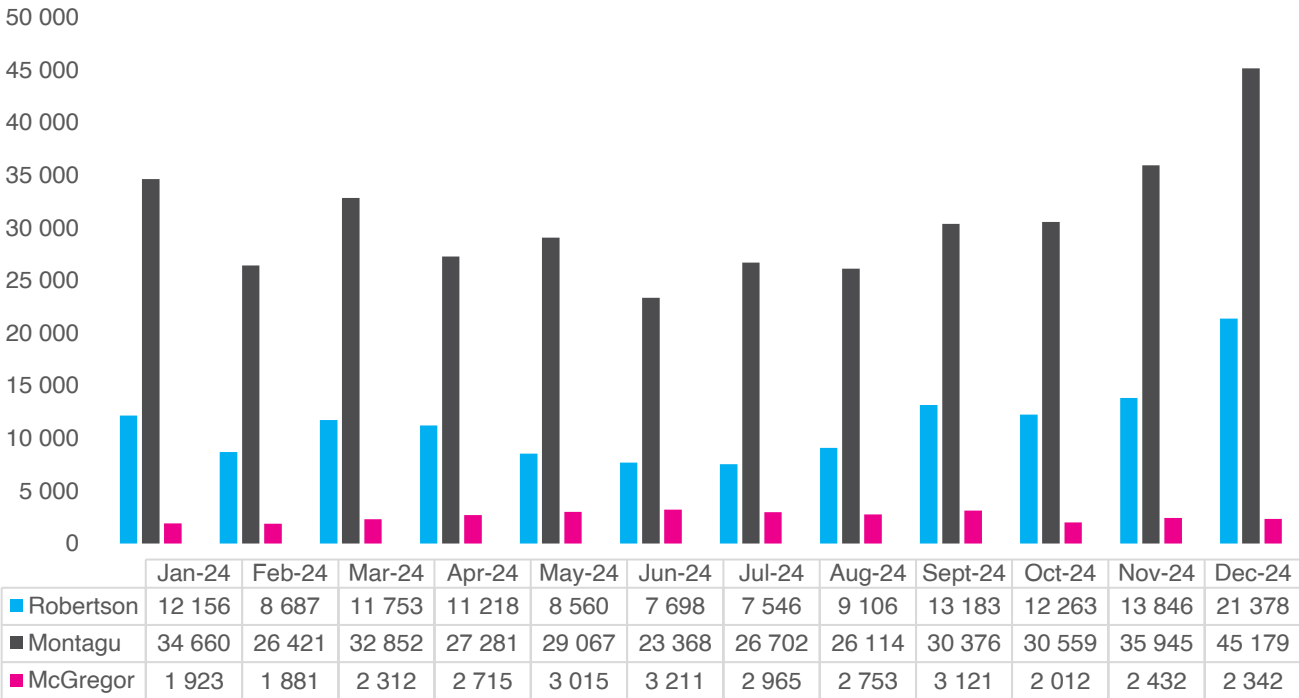
- Figure 15 shows that more than 536,000 people visited the Langeberg region in 2024, a positive increase of 28.81% when compared to visitor arrivals in 2023.
- Looking at the different towns in the region, Montagu attracted the most number of visitors, with a combined total of 332,204 arrivals recorded for the period January – December 2024 as shown in Figure 16. From September to December 2024, a positive trend can be seen in all towns where visitor numbers increased month by month.

Figure 15: Total number of tourist arrivals in Langeberg, January–December 2019–2024



Source: Langeberg Municipality (2024)

Figure 16: Visitor arrivals by town, January–December 2024

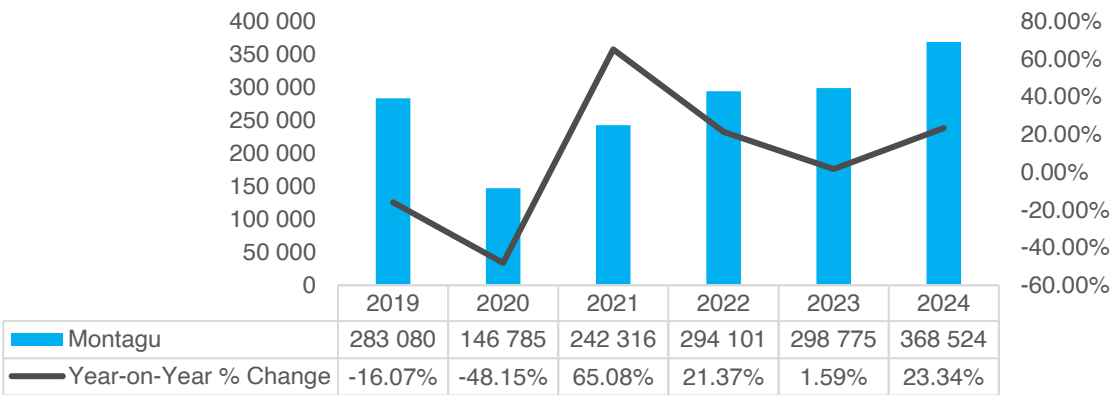


Source: Langeberg Municipality (2024)

7. Langeberg Visitor Trends

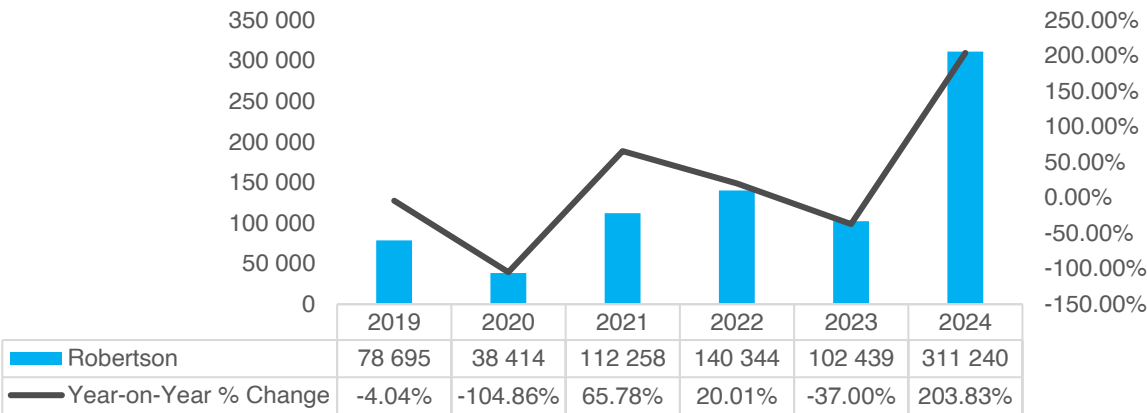
- Figures 17,18 and 19 show the visitor numbers per town for the Langeberg area between January and December from 2019 to 2024.
- In 2024 Montagu received the highest number of visitors with 368,524 arrivals which represents a 23.3% growth rate when compared to 2023. This was followed by Robertson with 311,240 visitors showing a year-on-year growth of 203.83%. McGregor attracted 30,682 visitors, representing a year-on-year growth of 99.7% when compared to the same period in 2023.

Figure 17: Montagu tourist arrivals, January–December 2024



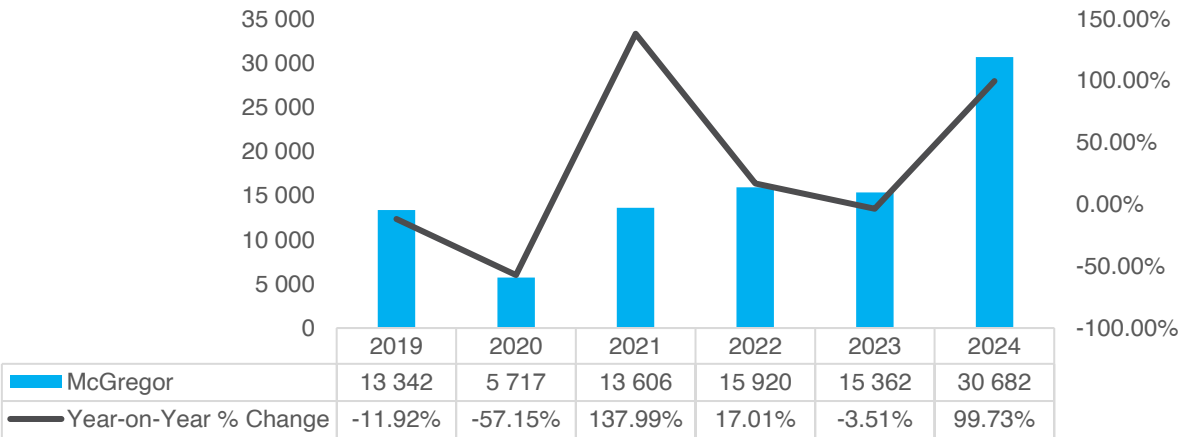
Source: Langeberg Municipality (2024)

Figure 18: Robertson tourist arrivals, January–December 2024



Source: Langeberg Municipality (2024)

Figure 19: McGregor tourist arrivals, January–December 2024

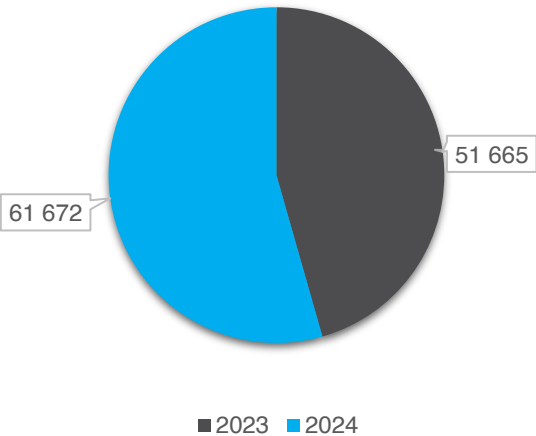


Source: Langeberg Municipality (2024)

7. Langeberg Attractions

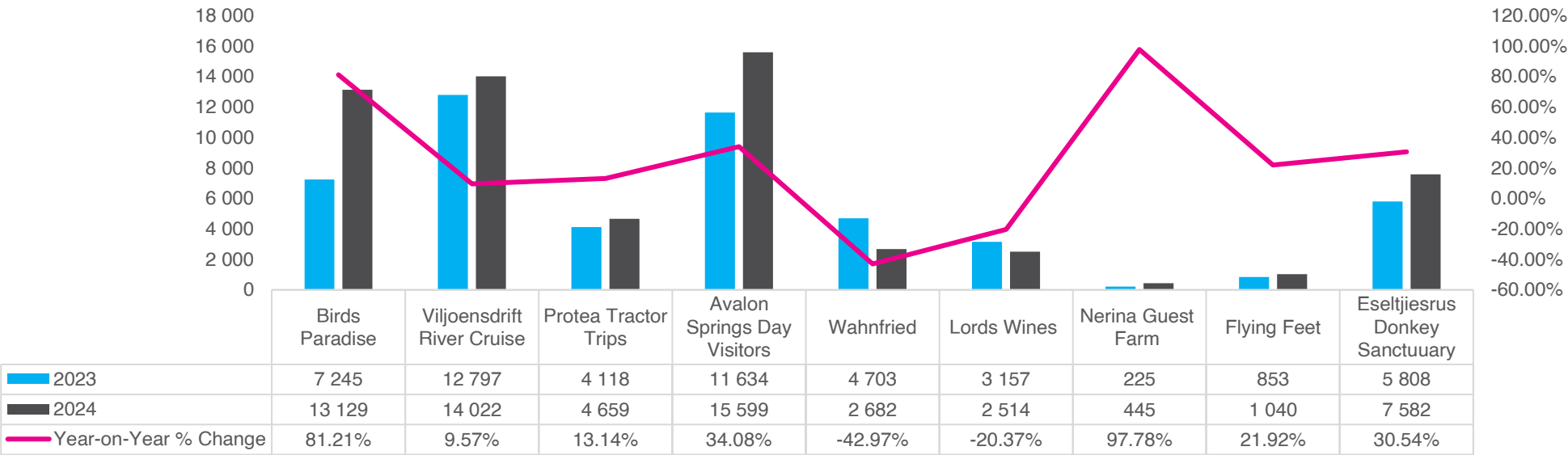
- Figure 20 shows the total number of visitors to attractions in the Langeberg municipal area between January and December in 2023 and 2024.
- During this period the number of visitors to attractions in the region increased by 19.4% to reach 61,672 individuals in 2024, up from 51,665 visitor arrivals recorded in 2023.
- The individual attractions in the Langeberg area are shown in Figure 21. Avalon Springs attracted the most visitors from January to December 2024 with a total of 15,599 arrivals, followed by visitors to Viljoensdrift River Cruises (14,022) and to Birds Paradise (13,129).

Figure 20: Total number of visitors to Langeberg Attractions, January–December 2024



Source: Langeberg Municipality (2024)

Figure 21: Langeberg attractions, January–December 2023–2024



Source: Langeberg Municipality (2024)

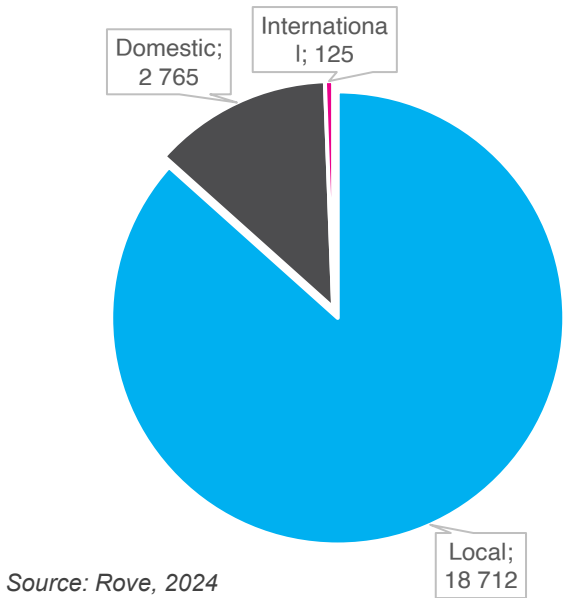
Stellenbosch Wine Valley Route

Mobile Location Data Insights
Review Period: January – December 2024

8. Stellenbosch Wine Route

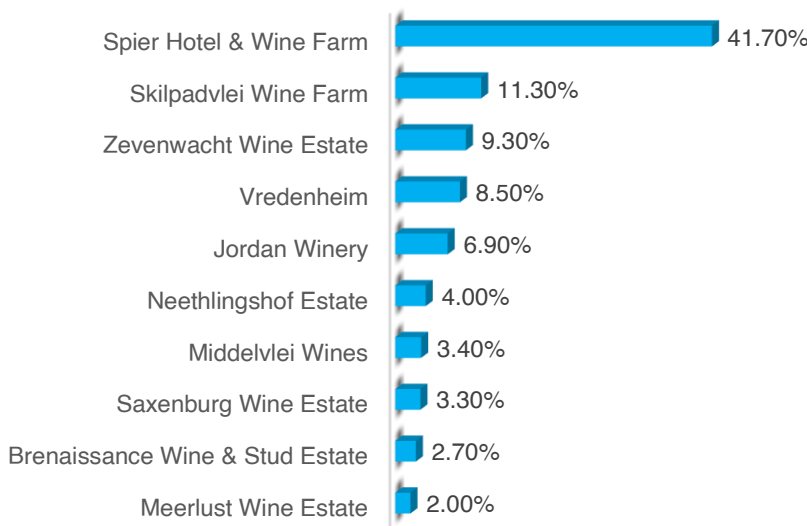
- From a sample size of 21,602 tourists who visited the Stellenbosch Wine Route in 2024, 18,712 were locals and 2,765 were domestic visitors, while 125 originated from overseas. This can be seen in Figure 22.
- Figure 23 shows that Spier Hotel & Wine Farm remained the most visited point of interest along the route in 2024, attracting 41.70% of visitors. This was followed by Skilpadvlei Wine Farm which was visited by 11.30% of visitors, and Zevenwacht Wine Estate with a 9.30% share of visitors.
- With respect to the average time spent at the listed wine farms, visitors spent the longest period of time at Meerlust Wine Estate, averaging 3.8 hours, followed by Zevenwacht Wine Estate where they spent 3.1 hours. At all other estates, the average duration of visits was two hours. This is shown in Figure 24.

Figure 22: Number of visitors to Stellenbosch Wine Valley (2024)



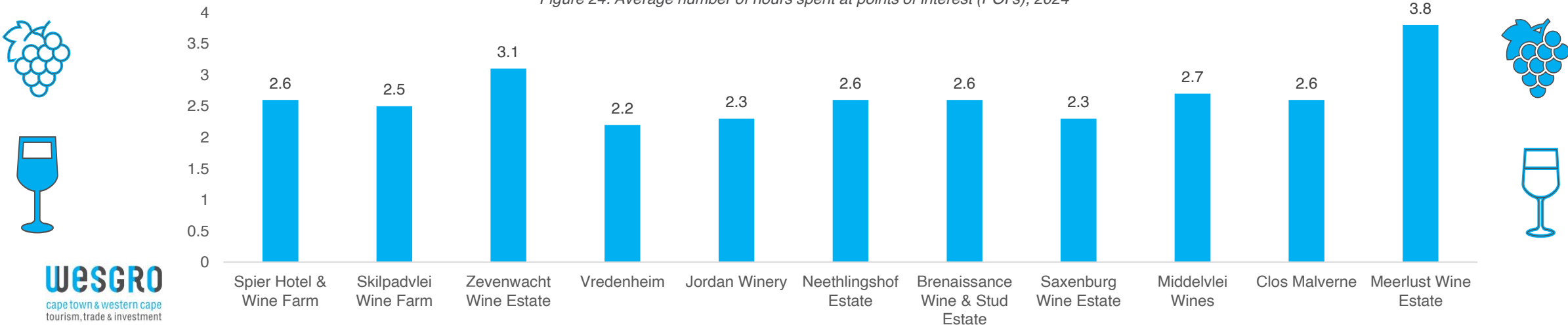
Source: Rove, 2024

Figure 23: Top 10 points of interest (POI's) Visited in 2024

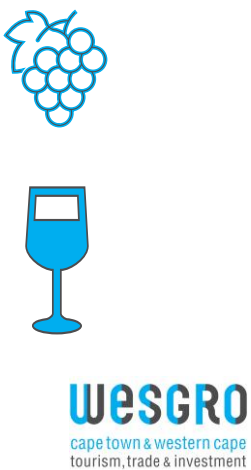


Source: Rove, 2024

Figure 24: Average number of hours spent at points of interest (POI's); 2024



Source: Rove, 2024





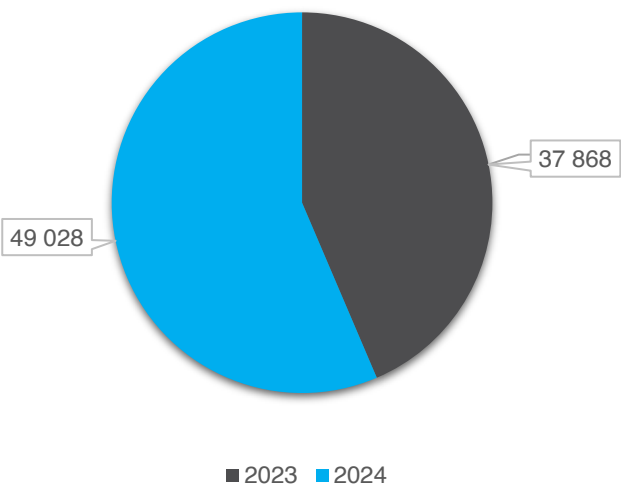
Cape Nature Reserves

Review Period: January – December 2024

9. CapeNature Visitor Trends

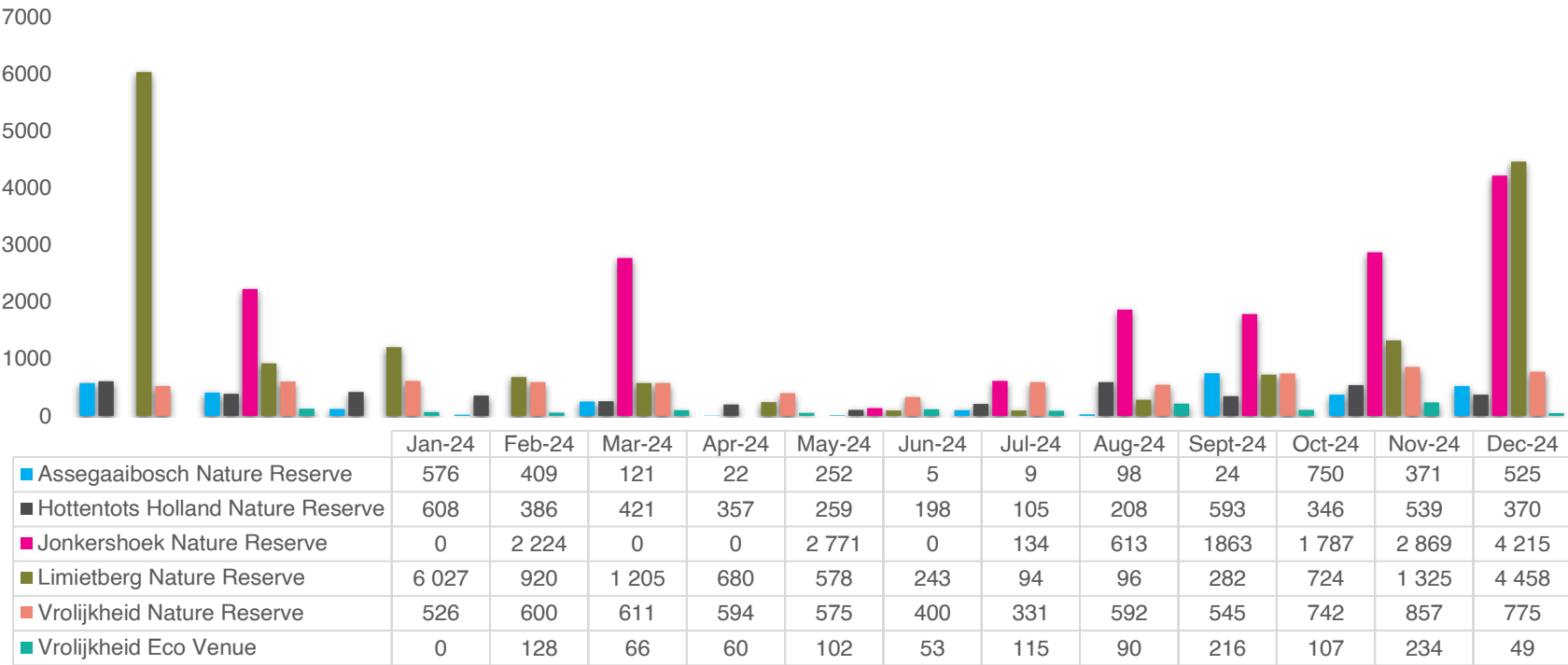
- CapeNature makes data available with regard to participating CapeNature attractions. The attractions included in this report are participating attractions from CapeNature which are shared with Wesgro. Cape Nature is a government entity responsible for managing and maintaining 31 nature reserve complexes comprising 112 nature reserves. The Western Cape is the only province in which it operates.
- Six of these CapeNature reserves are located in the Cape Winelands. Between January and December 2024, a total of 49,028 visitors visited the reserves, reflecting a growth of 29.5% when compared to 2023. This is illustrated in Figure 25.
- Tucked away in the Du Toitskloof Mountains near Paarl, Limietberg Nature Reserve attracted the highest number of visitors to CapeNature reserves in the region (16,632), as shown in Figure 26. This was followed by 16,476 visitors to Jonkershoek Nature Reserve and 7,148 visitors to the Vrolijkheid Nature Reserve.

Figure 25: Total number of visitors to CapeNature parks in the Winelands January–December 2023–2024



Source: Cape Nature 2024

Figure 26: Total number of Visitors' to CapeNature parks in the Winelands, January–December 2024



Source: Cape Nature 2024

10. Acknowledgements

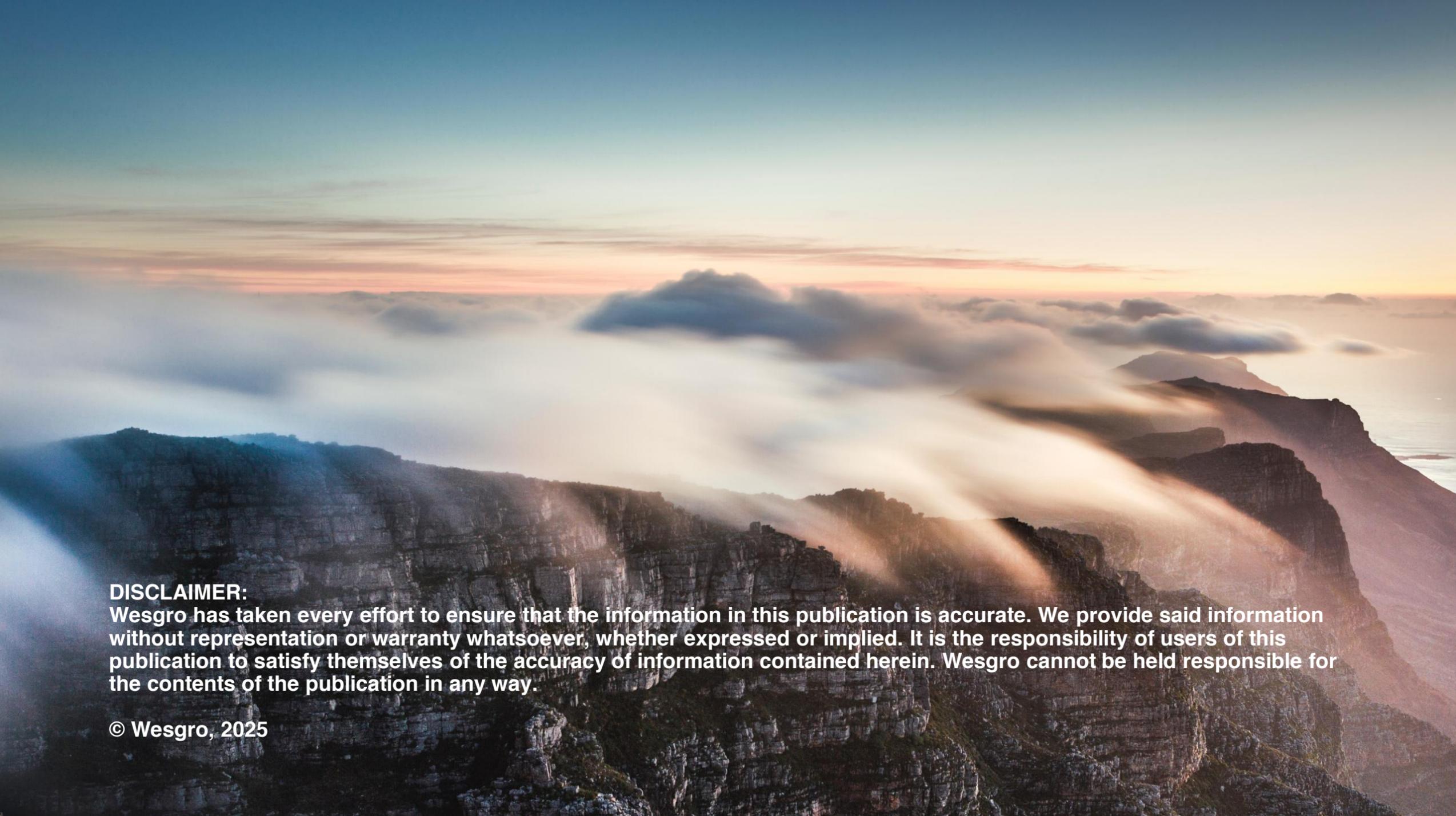
Acknowledgements and many thanks go to the Cape Winelands District Municipality and the following tourism offices and attractions for supplying the data which made this publication possible and whose continued and unwavering support will sustain the forthcoming issues.

The participating local tourism offices in the Cape Winelands included:

- Ceres
- Paarl
- Tulbagh

Other Sources

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



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