



Cape Winelands Tourism Visitor Trends

January to June 2025

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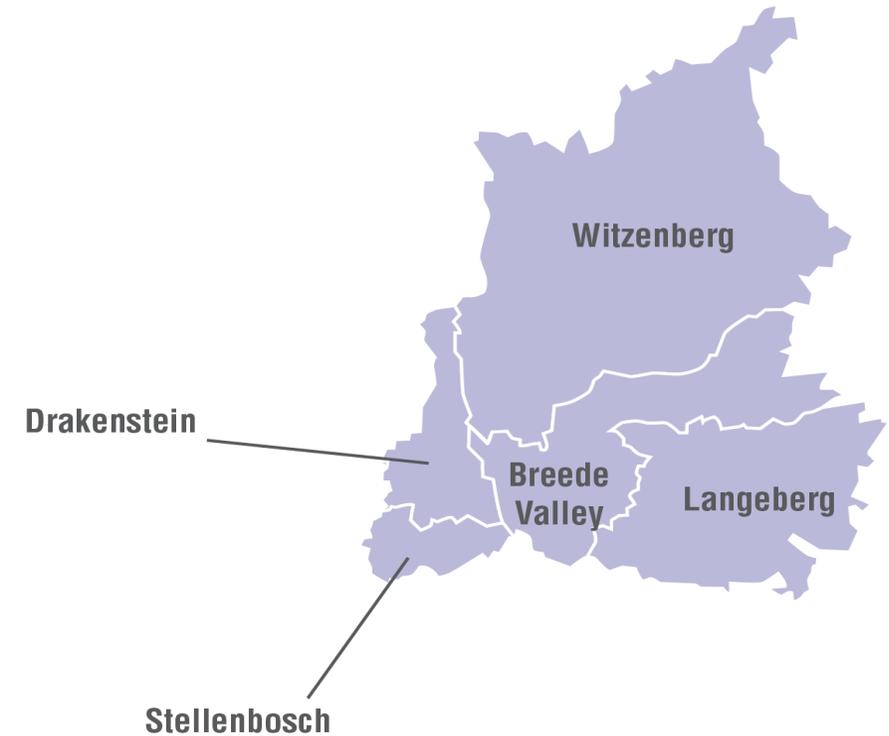
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1. About this Report

This report provides an overview of the latest data from local tourism offices in the Cape Winelands between January and June 2025.

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 only at 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 June 2025, a total of 710 responses to the regional visitor tracking surveys were received from the towns of Ceres and Paarl in the Cape Winelands. This is indicated in Table 1.

Table 1: Total number of responses from visitors to two towns in the Cape Winelands, between January and June 2025

Towns	Domestic Visitors	Overseas Visitors
1. Ceres	536	68
2. Paarl	75	31
Total	611	99

Source: Wesgro Regional Visitor Tracking Survey, 2025

4. Key Insights

- The information provided in the report is obtained from the visitor tracking surveys distributed by Wesgro to participating tourism offices in the Cape Winelands, namely Paarl and Ceres.
- **Visitor segment and origin:** Between January and June 2025, 86.06% of visitors to the Cape Winelands were domestic tourists, with 72.25% of these from the Western Cape. Overseas visitors accounted for 13.94% of respondents, with 38.38% of these visitors coming from the combined states of Benelux, as the leading source market, Germany followed with a 12.12% share of visitors and the United Kingdom with a share of 6.06% of visitors.
- **Seasonality spread:** April was the month that attracted the most visitors. A high share of visitors were from the domestic market, while the highest share of international tourists (104) visited in March. Other peak months were February (with 143 visitors) and March (with 122 visitors). Visitor numbers started to decline from May (with 88 visitors) into June (with 84 visitors).
- **Demographics:** There were two age groups captured from the survey responses with (0.85%) of visitors aged 51–70 years and (0.14%) of visitors aged between 21 and 35 years. Unfortunately, throughout the report a large share of survey respondents were unspecified and 99.01% of these were noted from the age demographics.
- **Length of stay:** The highest share of visitors to the Cape Winelands were day visitors (4.79%) as well those staying for seven nights or more (3.10%), highlighting the destination's appeal for both short breaks and extended holidays.
- **Information sources:** The leading source of information for visitors travelling to the Cape Winelands was from visitor information centres (0.56%), word of mouth referrals (0.28%) as well as from social media engagements (0.14%).
- **Transportation and accommodation preferences:** Among domestic visitors, 8.31% used their own motor vehicles, while 29.29% of travellers from overseas used rental cars, reflecting a preference for flexibility. When observing visitor accommodation preferences, guesthouses (chosen by 3.38% of visitors) and hotels (for 1.41% of visitors) were preferred.
- **Purpose of visit:** Most visitors (14.08%) indicated that leisure and holiday travel was their main reason for visiting the region.
- **Activities:** The main activities enjoyed by visitors were predominantly outdoor experiences, with the majority engaging in visits to cultural and heritage sites, wine tastings at local wine farms, and scenic drives across the region. These activities emerged as the most popular across all participating towns in the Cape Winelands region, highlighting the area's strong appeal for nature-based and cultural tourism experiences.
- **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 activities and attractions in the Langeberg area that draw attention to the towns of Robertson, Montagu, and McGregor and recently Bonnievale. In addition, the top points of interest in the Stellenbosch wine valley region are explored and listed in the report.



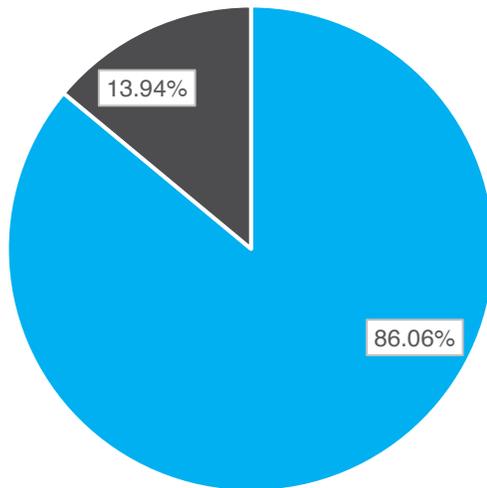
5. Cape Winelands Visitor Trends & Patterns

Wesgro Primary Research: Regional Visitor Tracking Surveys
Review Period: January – June 2025

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

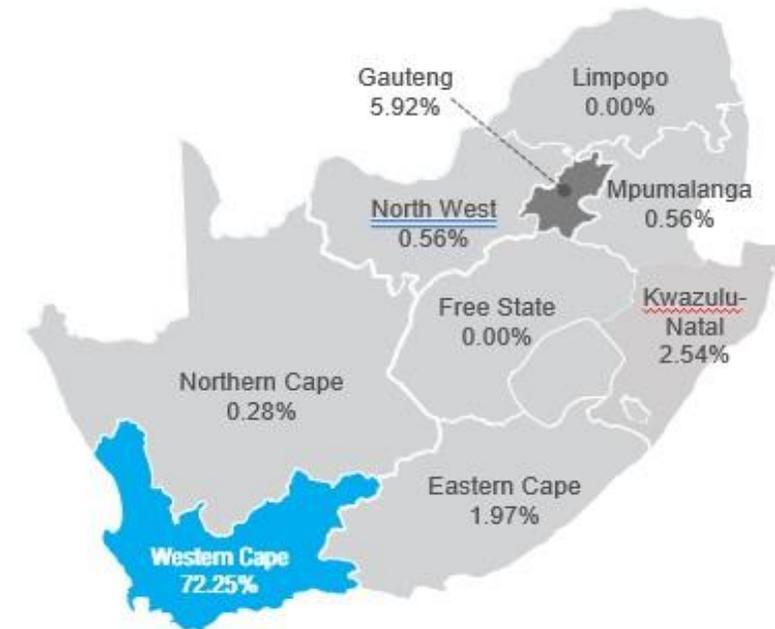
- Between January and June 2025, 13.94% of visitors to the Cape Winelands were international visitors, while 86.06% were domestic travellers. This distribution of visitors is illustrated in Figure 1.
- Among domestic visitors, a significant 72.25% originated from the Western Cape. The percentage share 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–June 2025



■ Domestic ■ Overseas

Figure 2: Origin of domestic visitors visiting the Cape Winelands, January–June 2025



Note: 15.92% of survey respondents did not specify their province of origin.

5. Cape Winelands Visitor Trends & Patterns: Source Markets

- According to Figure 3, the largest share of overseas travellers visiting the Cape Winelands region between January and June 2025 originated from the Benelux region consisting of Belgium, the Netherlands and Luxembourg, accounting for 38.38% of the overseas visitor sample. This was then followed by Germany (12.12%) and the United Kingdom (6.06%) forming the top three source markets from the sample of eight countries shown below.

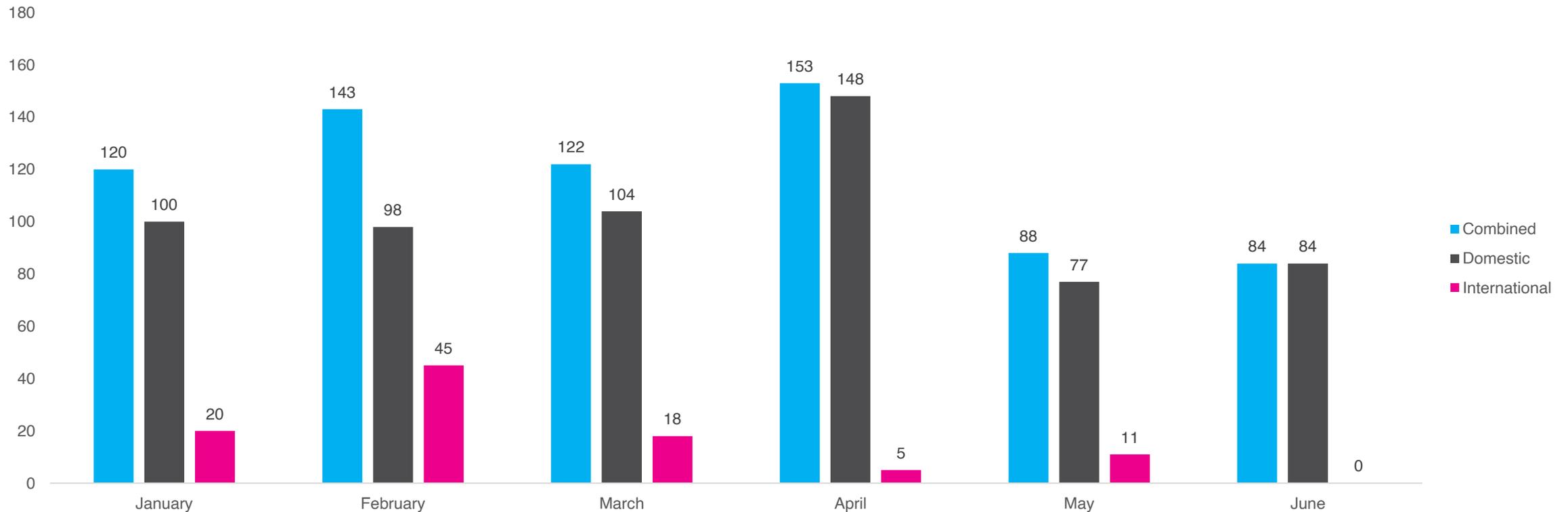
Figure 3: Origin of overseas visitors to the Cape Winelands, January–June 2025



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 April (153 visitors), February (143 visitors), and March (123 visitors), reflecting peak travel periods during the summer and autumn months in South Africa.
- The lowest number of arrivals was recorded in June (84 visitors), with no international visitors captured during that month.

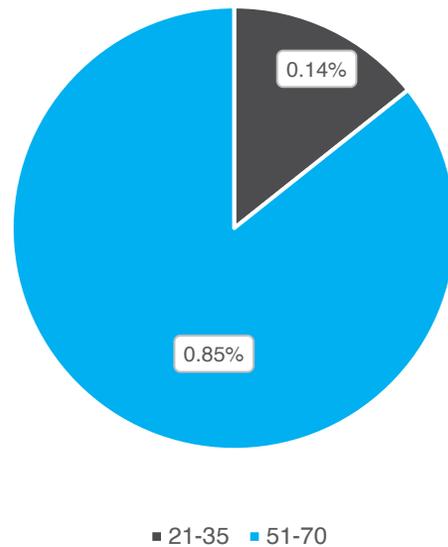
Figure 4: Seasonality spread of visitors to local tourism offices in the Cape Winelands, January–June 2025



5. Cape Winelands Visitor Trends & Patterns: Demographics

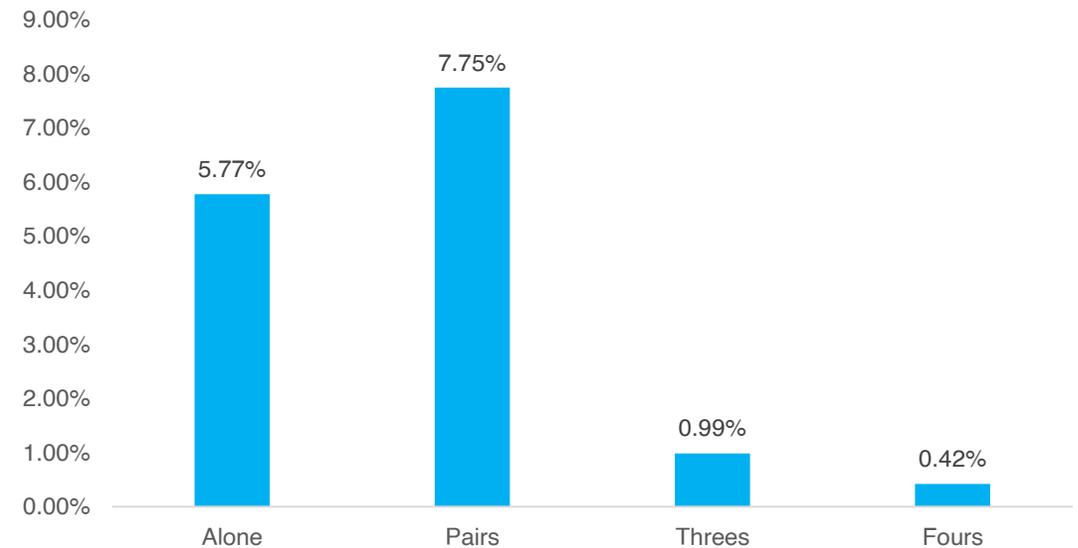
- Figure 5 provides an overview of visitor demographics in the Cape Winelands region for the period review. Visitors to the Cape Winelands could be categorised in two distinct age groups: 21 to 35 years and 51 to 70 years. These categories were notably the most represented among those who explored the 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 (7.75%) followed by solo travellers (5.77%). Smaller proportions were recorded for groups of three (0.99%), and groups of four (0.42%). This can be seen in Figure 6.

Figure 5: Age groups of visitors, January–June 2025



Source: Wesgro Visitor Tracking Survey, 2025

Figure 6: Travel group sizes of visitors, January–June 2025



Source: Wesgro Visitor Tracking Survey, 2025

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

- According to Figure 7, visitors travelling to the Cape Winelands were predominantly day visitors (4.79%), followed by those staying for seven nights or more (3.10%). This pattern suggests that the Cape Winelands primarily attracts short-term visitors who come for day trips or brief stays, likely motivated by wine tasting, scenic drives, and leisure experiences rather than extended vacations.
- Figure 8 illustrates the types of accommodation used by both domestic and international visitors. The data reveals that a proportion of travellers (3.38%) preferred guesthouses, followed by those who opted for hotels (1.41%) and self-catering establishments (0.56%). This preference for self-catering options suggests that many visitors value flexibility, privacy, and cost-effective accommodation during their stay in the Cape Winelands.

Figure 7: Average length of stay in the Cape Winelands region, January–June 2025

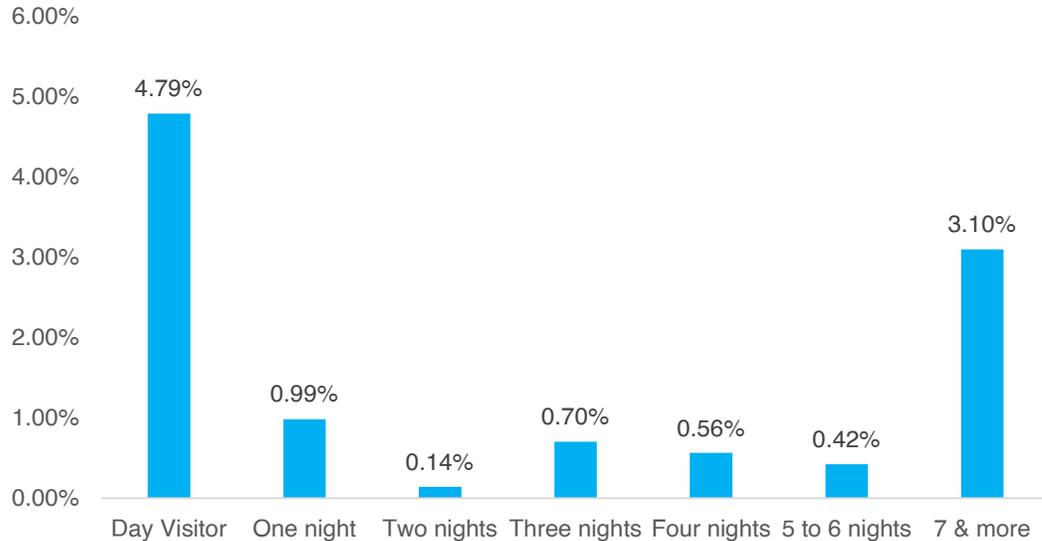
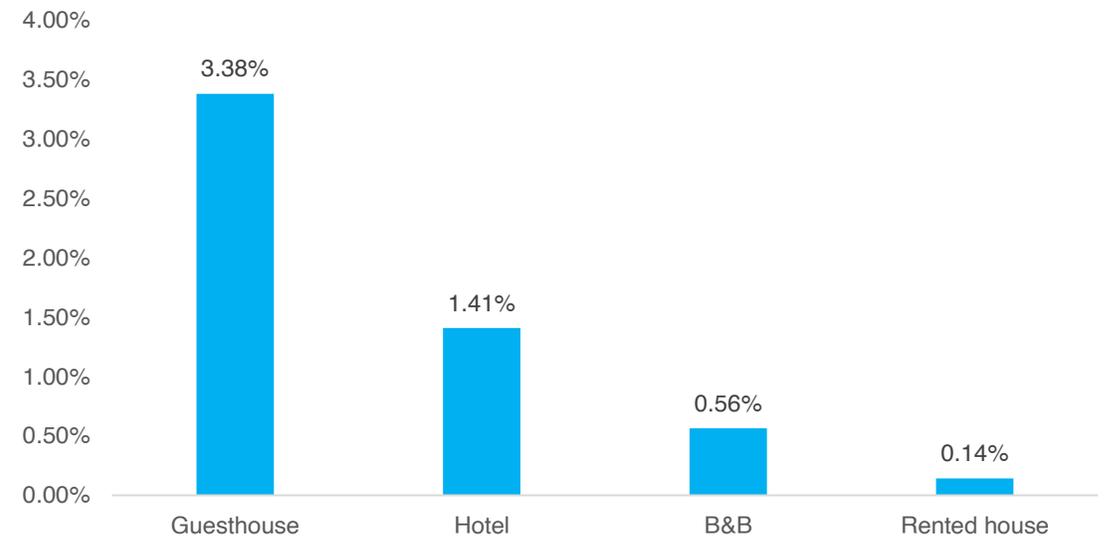


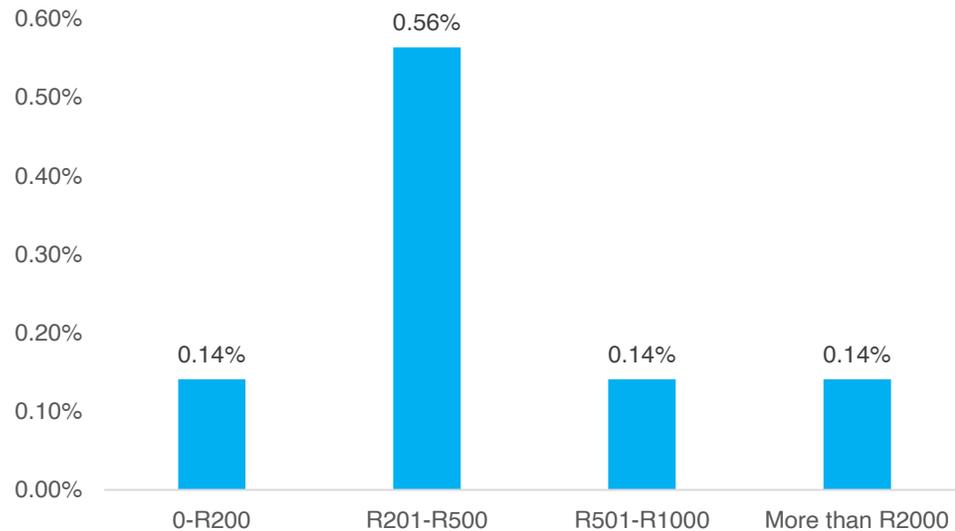
Figure 8: Accommodation usage in the Cape Winelands region, January–June 2025



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

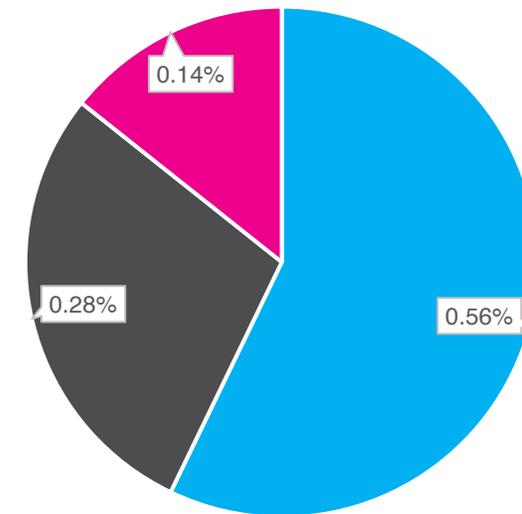
- Figure 9 presents the average daily spend reported by visitors. Less than 1% of visitors provided their spending patterns. However the information available shows that some 0.56% of travellers indicated that they spent between R201 and R500 per day. The other three categories (0-R200, R501-R1000, and more than R2000) each recorded an equal value of 0.14%.
- Figure 10 highlights the main information sources used by travellers to the region. The leading source of influence for visitors travelling to the Cape Winelands was visitor information centres (0.56%), word of mouth referrals (0.28%) and social media engagements (0.14%).

Figure 9: Average daily spend in the Cape Winelands, January–June 2025



Note: 99.01% 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–June 2025



■ Visitor information centres ■ Word of mouth ■ Social Media

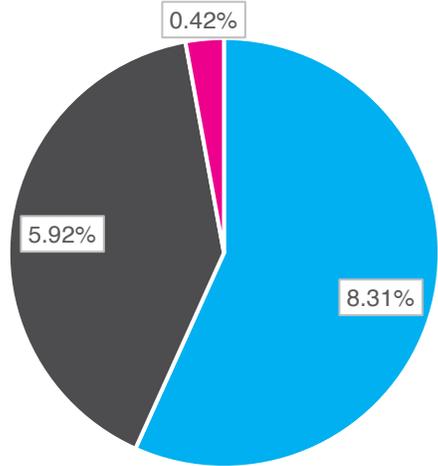
Note: 99.01% of the respondents to the survey did not specify their top information source.

Source: Wesgro Visitor Tracking Survey, 2025

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

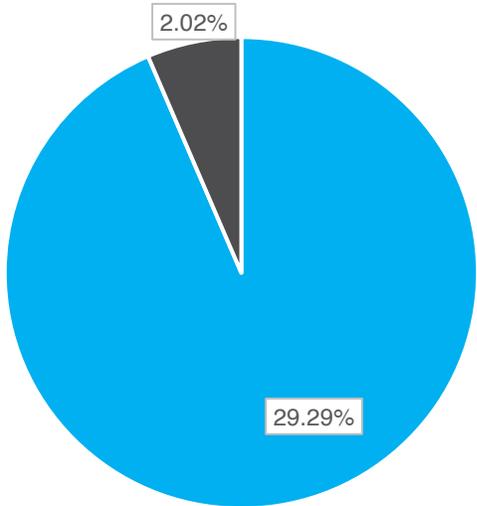
- Figures 11 and 12 provide insights into transportation preferences among domestic and overseas visitors who travelled to the Cape Winelands.
- Approximately 8.31% of domestic tourists used their own motor vehicles when visiting the Cape Winelands, while others (5.92%) preferred rented vehicles. Other modes of transport for domestic travellers included mini bus taxis and other forms of public transport.
- A share of 29.29% of International visitors opted for rental cars as their preferred mode of transportation. Alternative modes of transport used by international visitors were tour buses as well as mini bus taxi's.

Figure 11: Modes of transport used by domestic visitors in the Cape Winelands, January–June 2025



■ Own motor vehicle ■ Rented car ■ Other

Figure 12: Modes of transport used by overseas visitors in the Cape Winelands, January–June 2025



■ Rented car ■ Other

Note: 85.35% of survey respondents did not specify their preferred mode of transport

Source: Wesgro Visitor Tracking Survey (2025)



Source: Wesgro Visitor Tracking Survey (2025)

5. Cape Winelands Visitor Trends & Patterns: Travel Motivations

- Figure 13 indicates that most tourists (14.08%) visited the region for leisure purposes, followed by those who travelled for business, education, seeing friends and relatives as well as for events or festivals which form a part of the “other” (0.56%) illustrated in the diagram.
- An analysis of the top tourism activities reveals that outdoor activities and nature experiences attracted the most interest, with 0.28% of visitors in the Cape Winelands region engaging in these activities. This highlights the region’s strong appeal to those interested in nature, as well as wine and culture lovers. Visitors are drawn to the scenic landscapes, adventure trails, and other recreational opportunities available in the region. This is shown in Figure 14.

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

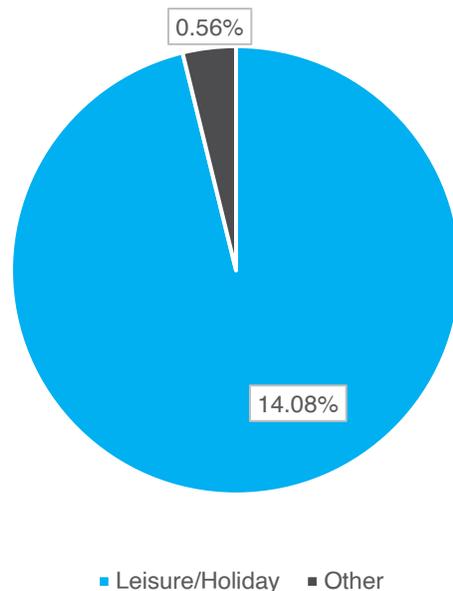
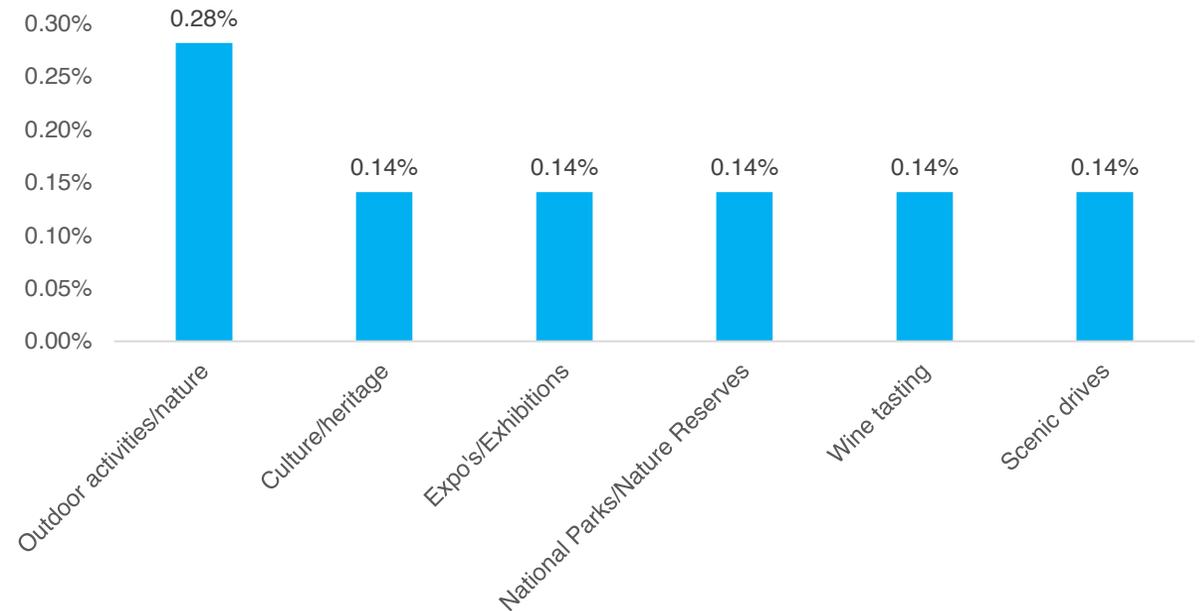


Figure 14: Top activities undertaken by visitors in the Cape Winelands, January–December 2024



6. Visitor Trends & Patterns in Ceres and Paarl

Table 1: Overview of visitor trends and patterns by town, January–June 2025

Tourism indicators	Ceres	Paarl
% Share domestic visitors	88.74%	70.75%
% Share overseas visitors	11.26%	29.25%
Top 3 international markets	Benelux (55.88%) United States (5.88%) Germany (2.94%)	Germany (32.26%) United Kingdom (19.35%) Switzerland (12.90%)
Top 3 domestic markets	Western Cape (76.49%) Gauteng (6.13%) Kwa-Zulu Natal (2.65%)	Western Cape (48.11%) Gauteng (4.72%) Eastern Cape & Kwa-Zulu Natal (1.89%)
Main purpose of visit	Visitors did not specify	Leisure/holiday (94.34%)
Age profile of visitors	Visitors did not specify	21-35 (0.94%) 51-70 (5.66%)
Group size	Visitors did not specify	Alone (38.68%) Pairs (51.89%)
Length of stay	Visitors did not specify	Day Visitor's (32.08%) 7 & more nights (20.75%)
Top 3 information sources	Visitors did not specify	Visitor information centres (3.77%) Word of mouth (1.89%) Social Media (0.94%)
Average daily budget	Visitors did not specify	R201-R500 (3.77%)
Average budget for accommodation	Visitors did not specify	Visitors did not specify
Type of accommodation	Visitors did not specify	Guesthouses (22.64%) Hotels (9.43%)
Mode of Transport	Visitors did not specify	Own motor vehicle (55.66%) Rented Car (39.62%)
Top 3 activities undertaken	Visitors did not specify	Over 90% of visitors did not specify

An aerial photograph of the Langeberg mountains in the Western Cape, South Africa. The mountains are rugged and layered, with a prominent peak on the left. The coastline is visible at the base of the mountains, and the ocean extends to the horizon. The sky is clear and blue.

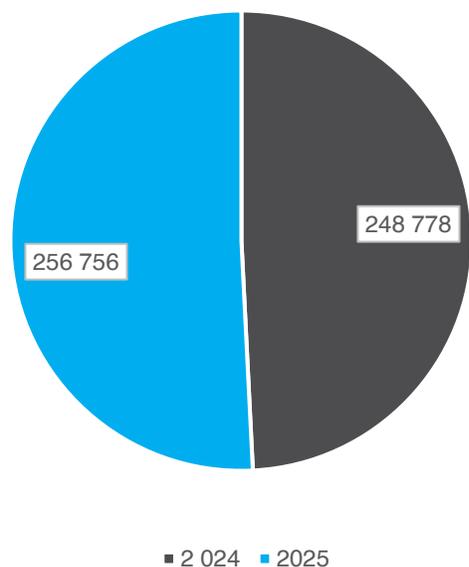
Langeberg Visitor Trends

Review Period: January – June 2025

7. Langeberg Visitor Trends: Sample Size

- Figure 15 shows that more than 248,000 people visited the Langeberg between January and June in 2025, a positive increase of 3.21% when compared to visitor arrivals in 2024.
- The summer months of January to March were the most popular months for visitors. across all towns — this is clear evidence of visitors' preference . Looking at the different towns in the region, Montagu attracted the highest share number of visitors, with a combined total of 194,217 arrivals recorded for the period January – June 2025, as shown in Figure 16.

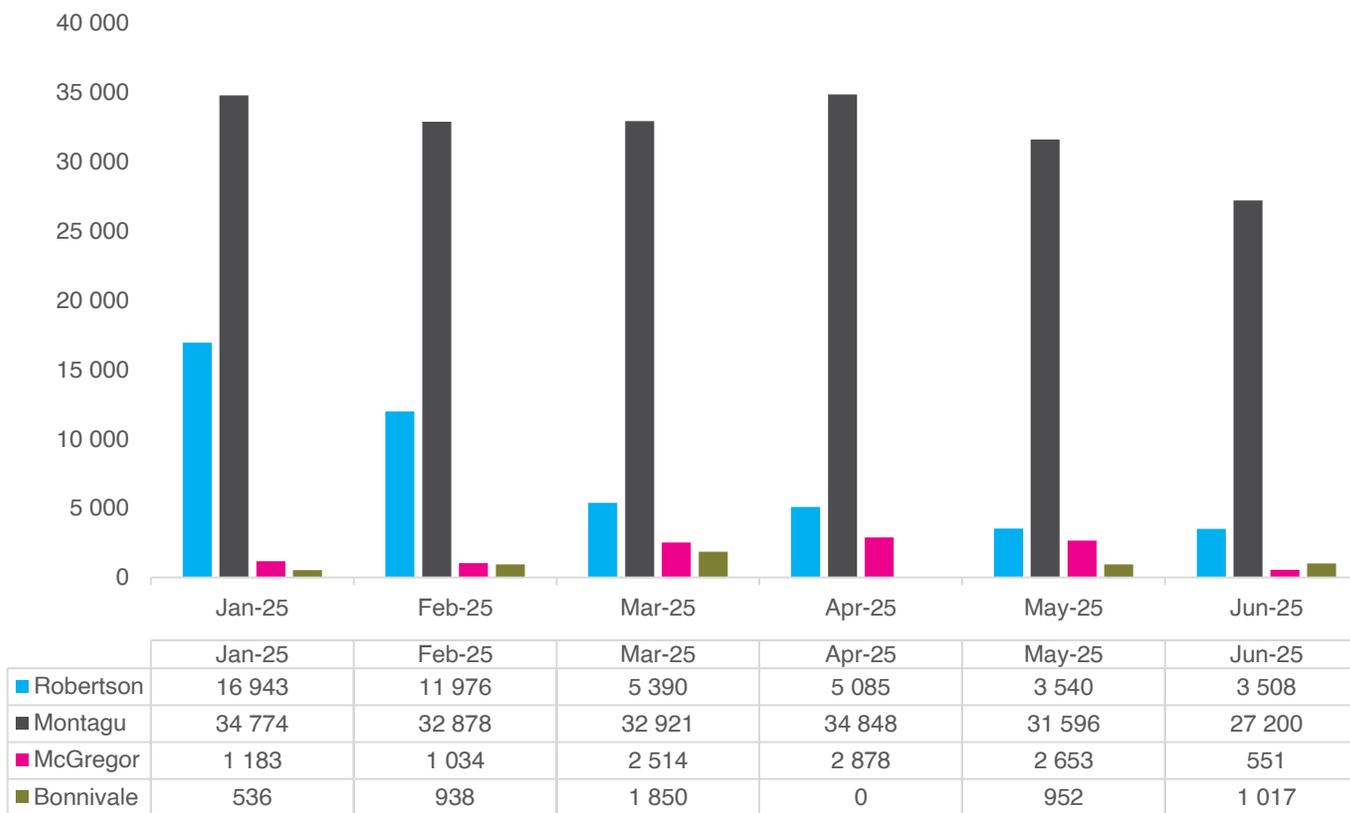
Figure 15: Total number of tourist arrivals in Langeberg, January–June, 2024–2025



Source: Langeberg Municipality (2025)



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

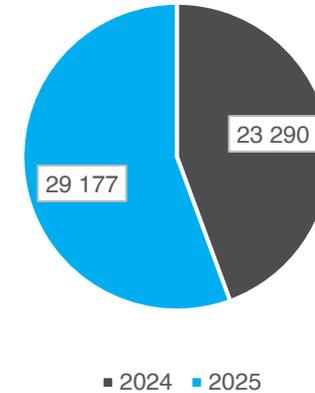


Source: Langeberg Municipality (2025)

7. Langeberg Visitor Trends: Activities Sample Size

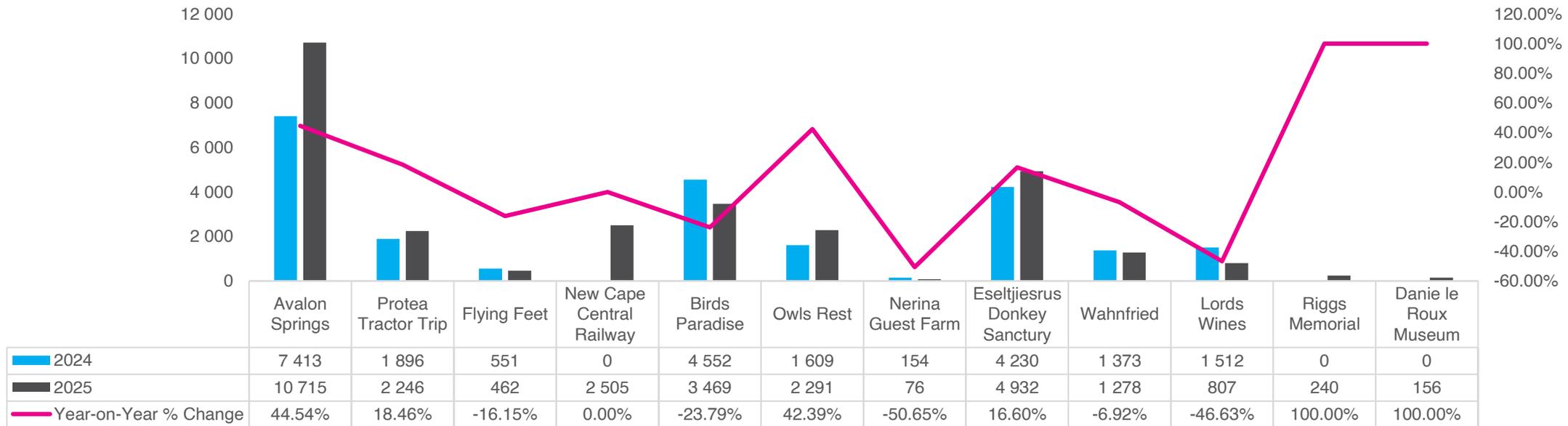
- Figure 17 shows the total number of visitors who participated in activities in the Langeberg municipal area from January to June in 2025 in comparison to 2024.
- During this period the number of visitors to these activities increased by 25.28% to reach 29 177 individuals in 2025, up from 23 290 visitor arrivals recorded in 2024.
- The individual activities are shown in Figure 18. Avalon Springs attracted the most visitors from January to June 2025 with a total of 10,715 arrivals, followed by visitors to Eseltjiesrus Donkey Sanctuary (4,932) and Birds Paradise (3,649) who participated in the New Cape Central Railway that started sharing data in February 2025.

Figure 17: Total number of visitors participating Langeberg activities, January–June 2025



Source: Langeberg Municipality (2025)

Figure 18: Langeberg activities, January–June 2024–2025



An aerial photograph of the Langeberg mountains in the Western Cape, South Africa. The mountains are rugged and green, with a prominent peak on the left. The coastline is visible, showing a mix of urban areas and natural landscapes. The ocean is a deep blue, and the sky is a pale, hazy blue. The overall scene is serene and scenic.

Langeberg Visitor Trends & Activities by Town

Review Period: January – June 2025

7. Montagu Visitor Trends & Activities

- Figures 19 and 20 show the visitor arrival numbers as well as activities enjoyed by tourists in the town of Montagu. Montagu is a quaint, historic town on the famous Route 62 halfway between Cape Town and the Garden Route.
- A total of 194 217 visitors were welcomed in the town in January – June 2025, reflecting a positive increase in arrival numbers of 44.74% when compared to the same period in 2024. The peak visitor months for both arrivals and activities were January and March 2025. Visitors to the region enjoyed a variety of experiences, from relaxing in the natural spring pools at Avalon Springs to exploring the countryside on Protea Tractor Trips and Flying Feet’s guided bike tours, which showcase the town’s scenic charm and vibrant outdoor lifestyle..

Figure 19: Montagu tourist arrivals, January–June 2025

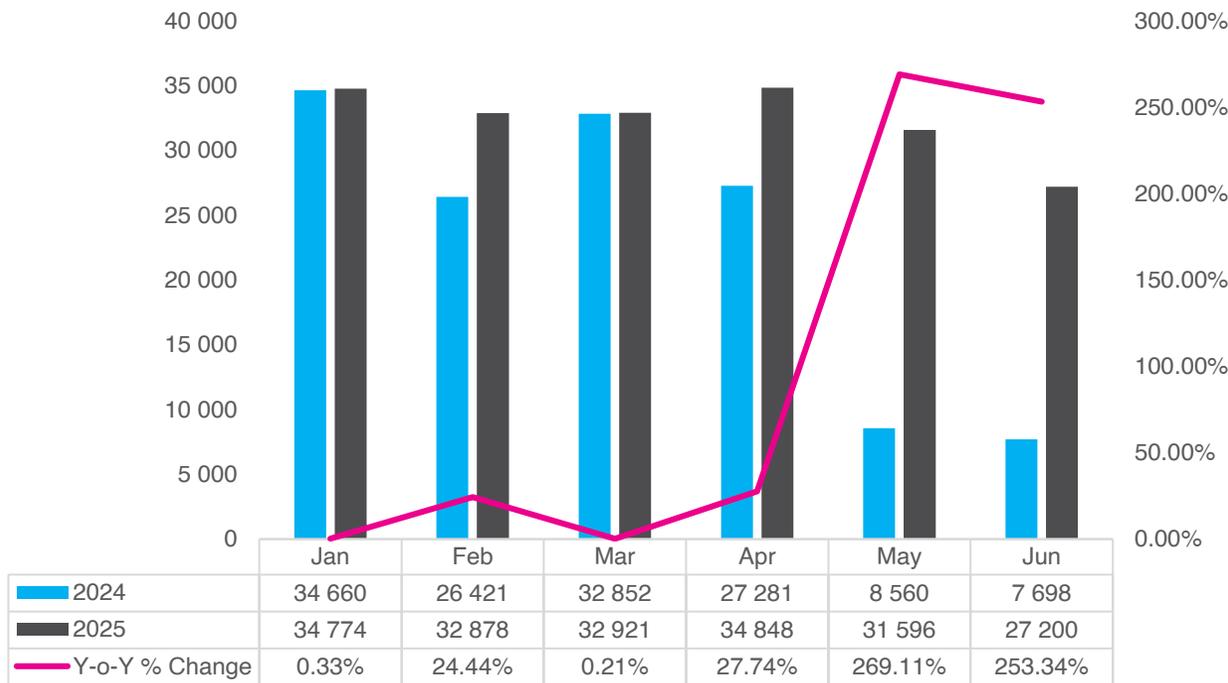
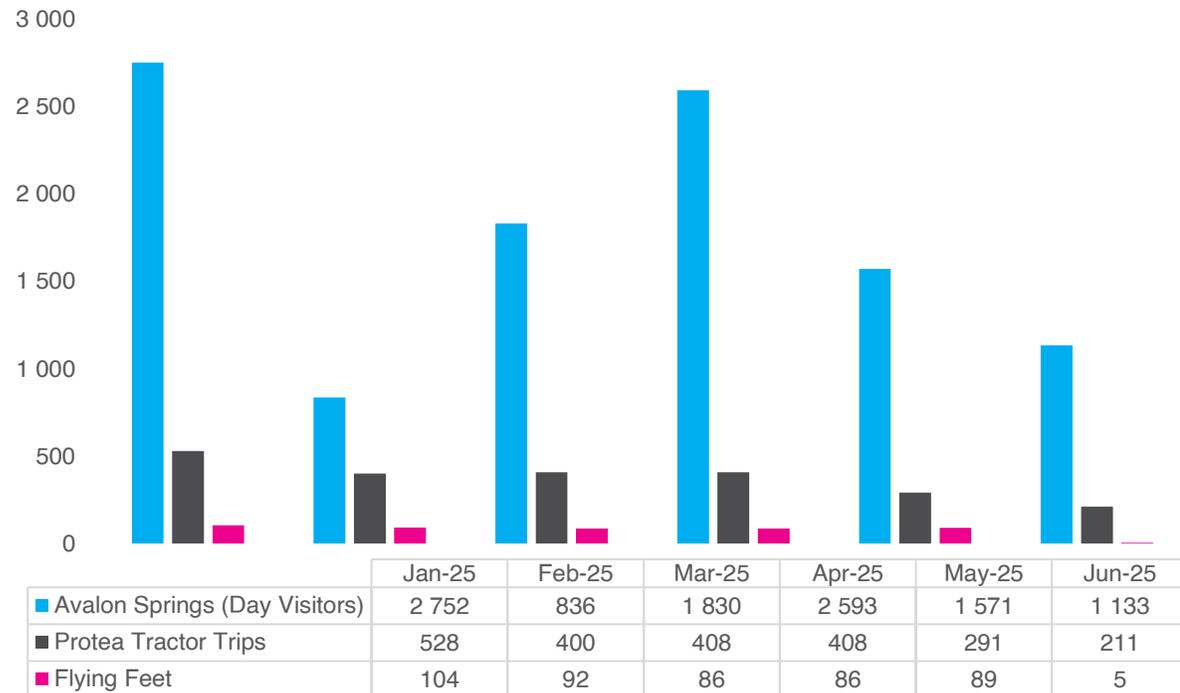


Figure 20: Montagu Visitor Activities Performance, January–June 2025



7. Robertson Visitor Trends & Activities

- Figures 21 and 22 show the visitor arrival numbers as well as activities enjoyed by tourists in the town of Robertson. The town is situated close to the Langeberg Mountains as well as the Breede river in the Western Cape.
- A total of 46 442 visitors were welcomed in the town in January – June 2025, a -22.69% decline compared to the same period in 2024. The busiest times for the town occurred during the summer and autumn months, coinciding with the warmer travel season and key regional events including school holidays. Popular activities in the region included visits to Birds Paradise, Owls Nest, and Nerina Guest Farm, with the New Cape Central Railway recently added as a key activity/attraction.

Figure 21: Robertson tourist arrivals, January–June 2025

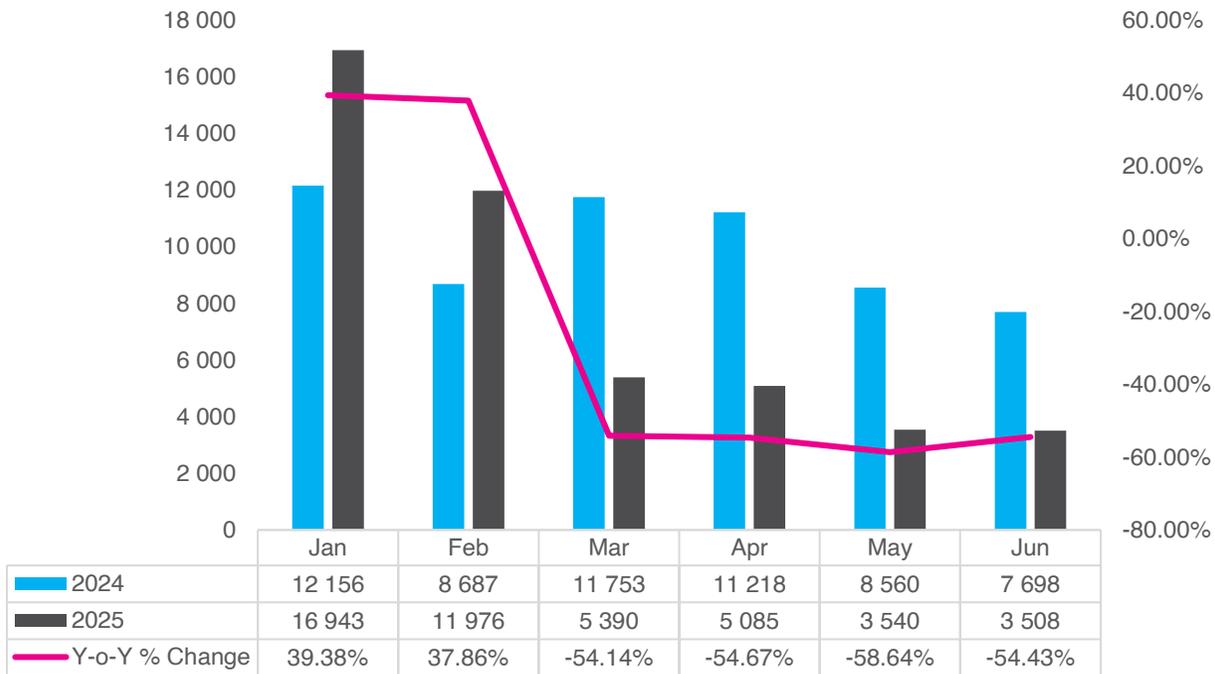
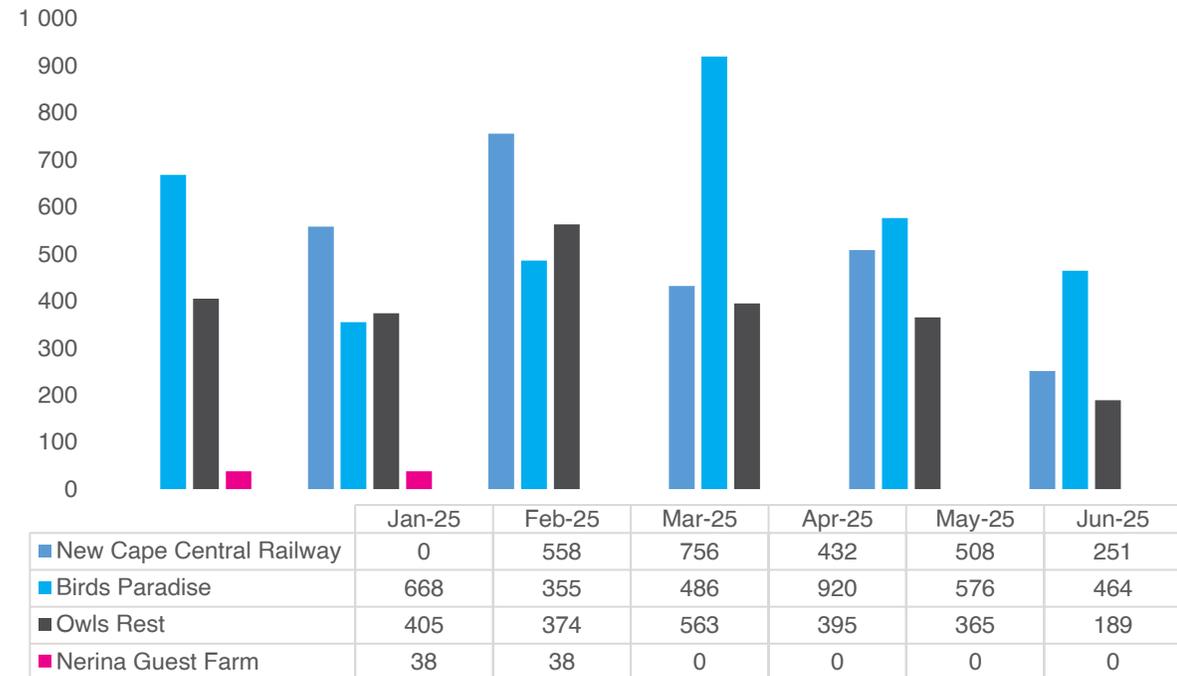


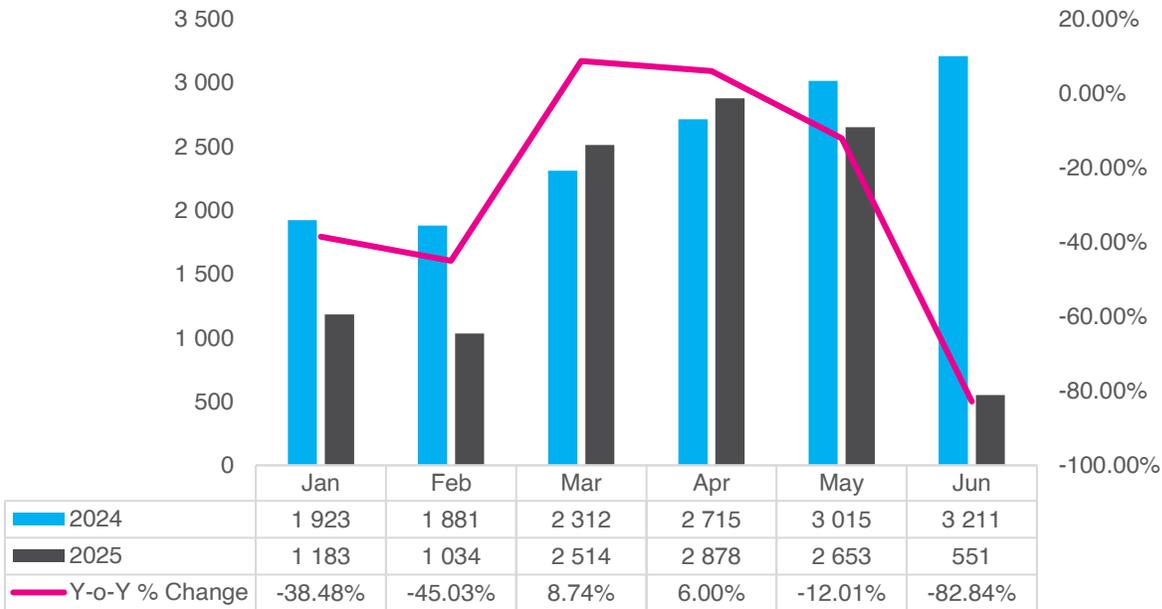
Figure 22: Robertson Visitor Activities: Performance, January–June 2025



7. McGregor Visitor Trends & Activities

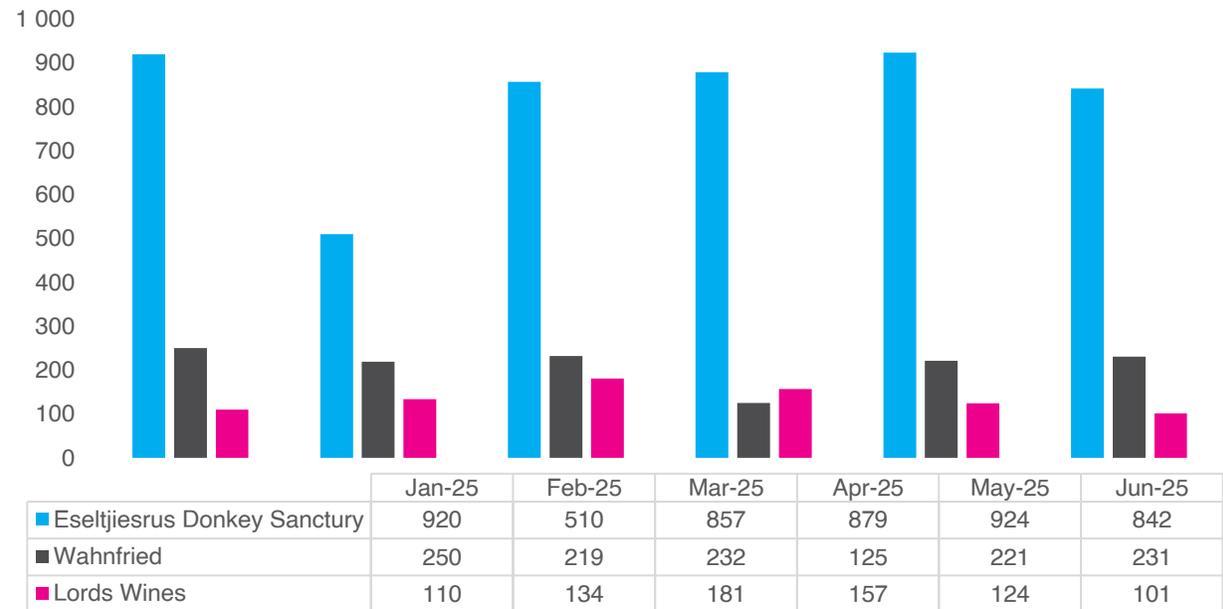
- Figures 23 and 24 show the visitor arrival numbers as well as activities enjoyed by tourists in the town of McGregor. The town sits at the foot of the Riversonderend mountains just two hours away from Cape Town.
- A total of 10 813 visitors were welcomed in the town in January – June 2025, a -28.19% decline compared to the same period in 2024. Activities in the region were enjoyed at the Eseltjiesrus Donkey Sanctuary, Wahnfried as well Lords Wines nestled away at the end of the McGregor valley.

Figure 23: McGregor tourist arrivals, January–June 2025



Source: Langeberg Municipality (2025)

Figure 24: McGregor visitor activities performance, January–June 2025

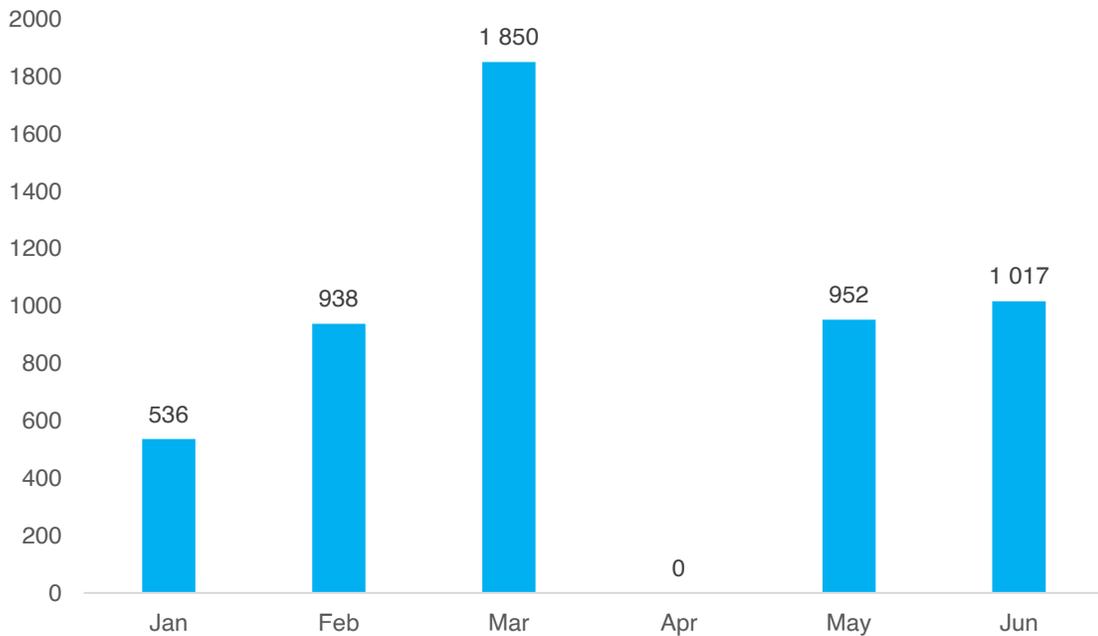


Source: Langeberg Municipality (2025)

7. Bonnievale Visitor Trends & Activities

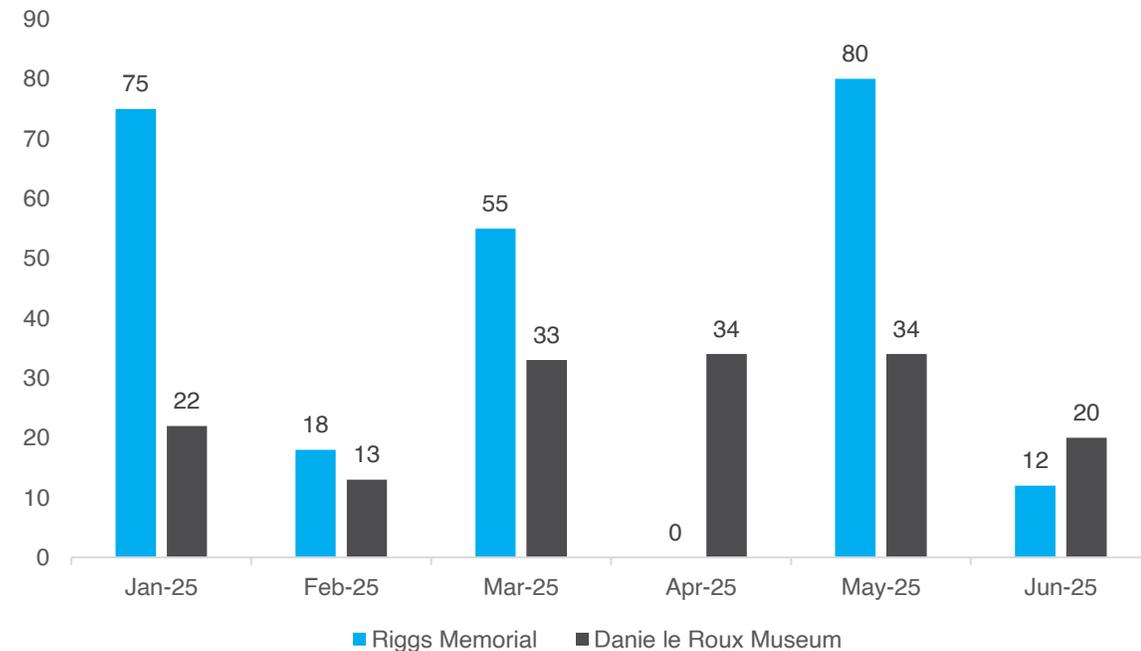
- Figures 25 and 26 show the visitor arrival numbers as well as activities enjoyed by tourists in the town of Bonnievale. The town is known as the Valley of Cheese and Wine, and lies in the shadow of the Langeberg and Riviersonderend Mountains on the banks of the Breede River.
- A total of 5 293 visitors were welcomed in the in January – June 2025. The peak arrival months for the town were in March with 1 850 visitor arrivals and June with 1 017 visitor arrivals, indicating the town’s appeal across different travel seasons. Visitors to the region enjoyed exploring the Riggs Memorial and the Danie le Roux Museum, both of which offer unique insights into the area’s rich cultural heritage.

Figure 25: Bonnievale tourist arrivals, January–June 2025



Source: Langeberg Municipality (2025)

Figure 26: Bonnievale visitor activities performance, January–June 2025



Source: Langeberg Municipality (2025)

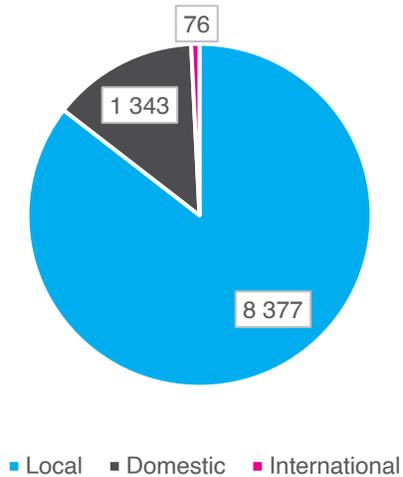
Stellenbosch Wine Valley Route

Mobile Location Data Insights
Review Period: January – June 2025

8. Stellenbosch Wine Route

- From a sample size of 9,796 tourists who visited the Stellenbosch Wine Route between January and June 2025, 8,377 were locals and 1,343 were domestic visitors, while 76 originated from overseas. This can be seen in Figure 27.
- Figure 28 shows that Spier Hotel & Wine Farm remained the most visited point of interest along the route from January to June 2025, attracting 42.80% of visitors. This was followed by visits to Skilpadvlei Wine Farm which was visited by 11.00% of visitors, and Zevenwacht Wine Estate with a 8.80% share of visitors.
- With respect to the average time spent at the listed wine farms, visitors spent the longest period of time at Zevenwacht Wine Estate, averaging 3.0 hours, followed by Middelvlei Wines and at the Brenaissance Wine & Stud Estate where visitors spent 2.7 hours. At all other estates, the average duration of visits was two hours. This is shown in Figure 29.

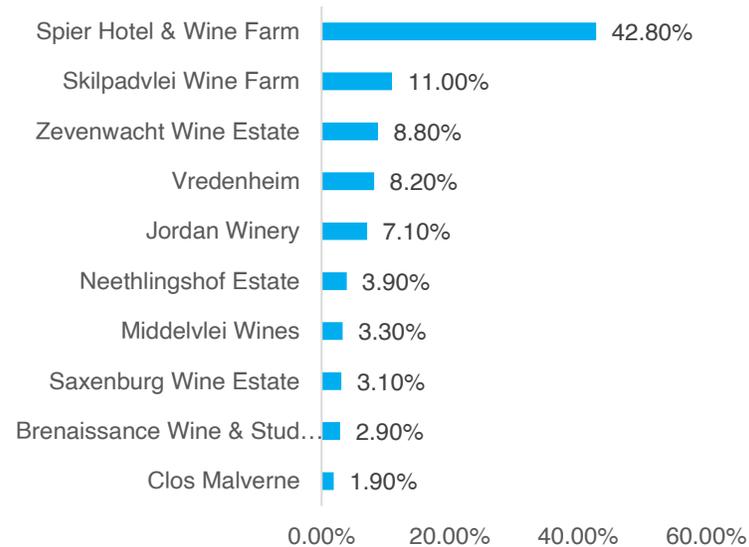
Figure 27: Number of visitors to Stellenbosch Wine Valley, January–June 2025



Source: Rove, 2025



Figure 28: Top 10 points of interest (POI's) Visited between January–June 2025



Source: Rove, 2025

Figure 29: Average number of hours spent at points of interest (POI's), January-June 2025



Source: Rove, 2025

An aerial photograph of the Cape Peninsula coastline in South Africa. The image shows the ocean in the foreground, with a white wake from a boat visible on the right. In the middle ground, the coastline curves around the base of several mountains. The most prominent mountain on the left is Lion's Head, with its characteristic flat top. Other mountains extend into the distance under a clear, light blue sky.

CapeNature Reserves

Review Period: January – June 2025

9. CapeNature Visitor Trends

- The attractions included in this report are participating attractions from CapeNature which are shared with Wesgro. CapeNature 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, and CapeNature reserves stretch from the Winelands and the West Coast to the Cape Karoo, the Overberg and the Garden Route. Six of these reserves are located in the Cape Winelands.
- Between January and June 2025, a total of 21,977 visitors visited the reserves, reflecting a mere decline of -0.52% when compared to 2024. This is illustrated in Figure 30.
- Tucked away in the Du Toitskloof Mountains near Paarl, Limietberg Nature Reserve attracted the highest number of visitors to CapeNature reserves in the region (14,264), as shown in Figure 31. This was followed by 2,421 visitors to the Vrolijkheid Nature Reserve and 1,848 visitors to the Hottentots Holland Nature Reserve.

Figure 30: Total number of visitors to CapeNature parks in the Winelands January–June, 2024–2025

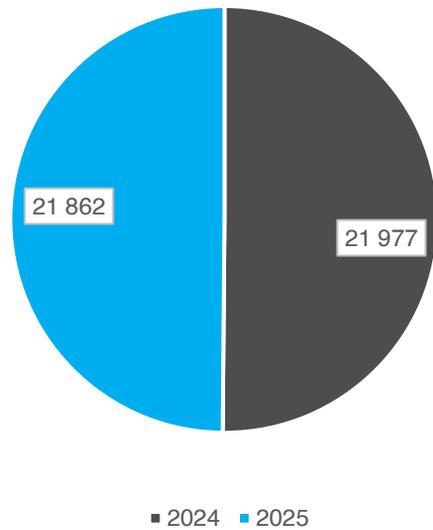
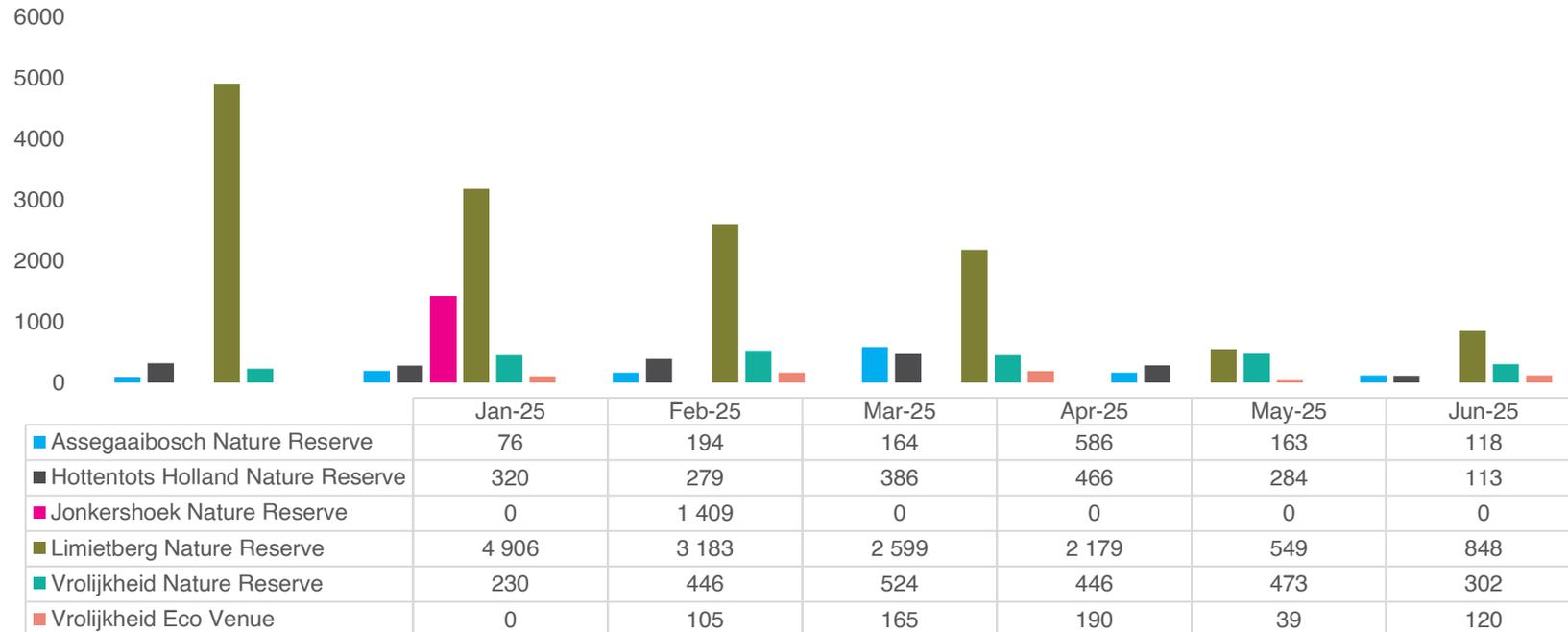


Figure 31: Total number of Visitors' to CapeNature parks in the Winelands, January–June 2025



Source: Cape Nature 2025

10. Acknowledgements

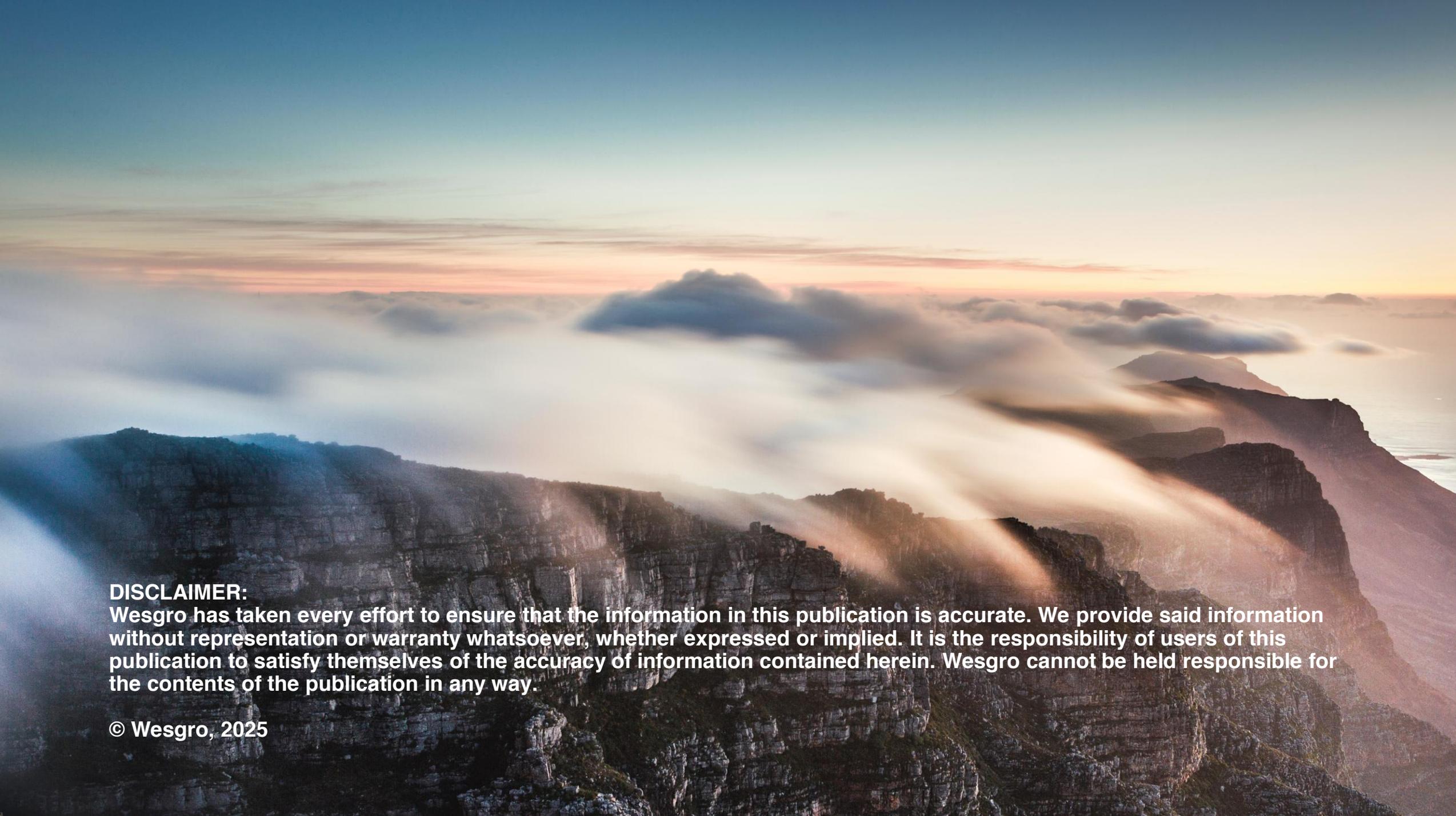
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Other Sources

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- Cape Nature
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