



Winelands Tourism Visitor Trends January to June 2024

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About this report:

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

The information provides insight into the origin of tourists 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 only the footfall at the participating tourism offices. Additional data included in the report reflects the performance of participating attractions in the region.

1. Methodology and definition

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 within 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 tourists into 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 within the tourism industry for determining key trends.

Source: Wesgro 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.

Source: Adopted from South African Tourism (SAT) (2024)

2. Sample size

Between January and June 2024, 1,158 responses to the regional visitor tracking surveys were received from the various tourism offices in the Winelands. This can be seen in Table 1 below.

Table 1: Number of surveys from participating towns in the Winelands between January and June 2024				
	Ceres	Paarl	Tulbagh	No. of surveys
Domestic	715	121	90	926
Overseas	104	65	63	232
Total Surveys	819	186	153	1 158

Source: Wesgro Visitor Tracking Survey (2024)

Western Cape regions/districts



Image Source: Wesgro (2024)

3. Executive Summary

- The period highlighted in this report (Jan-Jun 2024) indicates that the largest proportion of travellers to the Winelands originated from the domestic market (86.0%), in particular from within the Western Cape (89.6%).
- The overseas market accounted for 20.0% of visitors during the period, with the United States (32.3%), the United Kingdom (18.5%) and Germany (16.4%) in the top three positions.
- Close to 90% of visitors travelled to the Winelands for leisure/holiday, 7.9% travelled for education purposes, while 0.9% travelled for honeymoon/wedding purposes.
- Some 44.0% of visitors took day trips to the Winelands while overnight stays accounted for 56.0%. Of those who indicated overnight stays, two nights as well as 7 and above nights ranked as the most popular choices. The senior age groups of 51-70 and above 70 were the most notable. The largest proportion of respondents travelled to the region in pairs or on their own.
- The attractions highlighted in this report are from the Langeberg municipality. These attractions collectively welcomed a total of 33,033 visitors between January and June 2024. The top three participating attractions with the highest volume of visitors between January and June 2024 were: Viljoensdrift River Cruise (11,352 visitors), Avalon Springs (7,413 visitors), Elsetjiesrus Donkey Sanctuary (4,230 visitors).
- The Stellenbosch wine valley analysis is also included in this report and was collated with the use of mobile location data insights. CapeNature statistics are also included showcasing the visitor trends from the nature reserves of the Western Cape that are nestled in the Winelands region.

An aerial photograph of a coastline with mountains and the ocean. The mountains are in the background, and the ocean is in the foreground. The sky is clear and blue.

Winelands Visitor Trends & Patterns

Wesgro Primary Research: Regional Visitor Tracking Surveys

4. Winelands visitor trends & patterns

- The domestic market accounted for the largest share of respondents (80.0%) who visited the region between January and June 2024, while the overseas market made up 20.0% of visitors. This can be seen in Figure 1.
- The United States 32.3% ranked as the region's top overseas market followed by the United Kingdom (18.5%), Germany (16.4%), and the Netherlands (7.8%) as indicated in Figure 2.
- The largest share of domestic travellers to the region originated from the Western Cape (89.6%). This can be seen in Figure 3.

Figure 1: Overseas and domestic visitors, Jan–Jun 2024

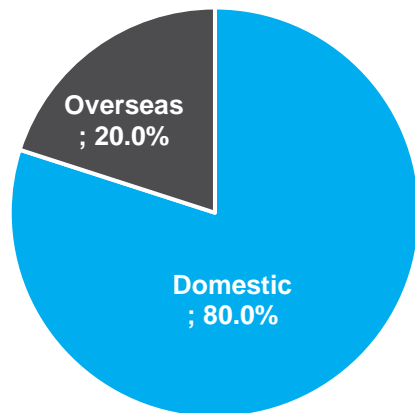


Figure 2: Origin of overseas visitors, Jan–Jun 2024

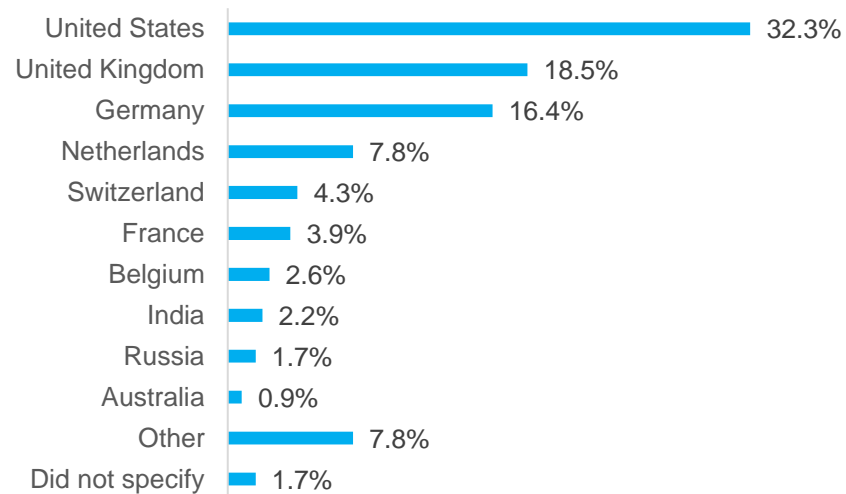
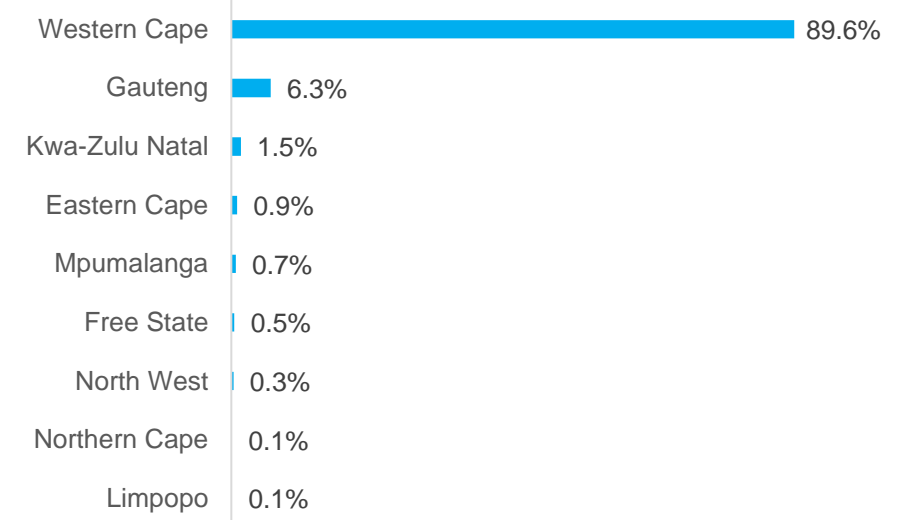
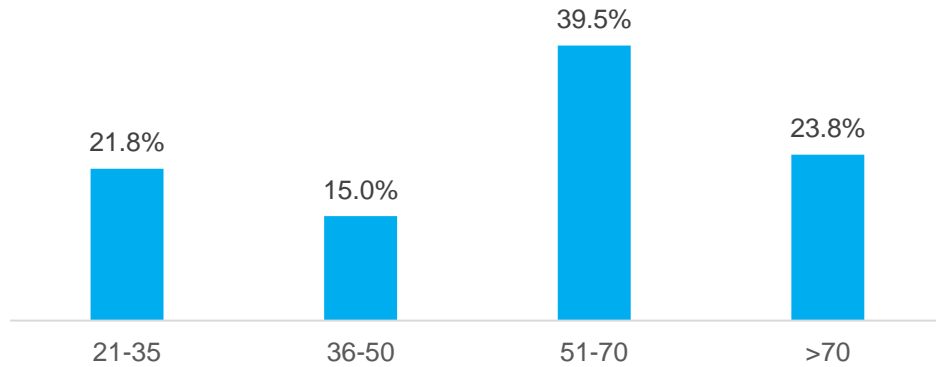


Figure 3: Origin of domestic visitors, Jan–Jun 2024



4. Winelands visitor trends & patterns

Figure 4: Age group of visitors, Jan–Jun 2024



- Figure 4 illustrates that most visitors to the Winelands were in the age groups 51–70 and above 70 years.
- The largest portion of visitors travelled to the region in pairs (50.0%), followed by 32.8% who travelled alone. This can be seen in Figure 5.
- Figure 6 shows that 56.1% of visitors preferred to use their own mode of transport. Mini-bus taxi (used by 26.9% of visitors) and rented vehicles (used by 15.1% of visitors) were the second and third most popular forms of transport.

Figure 5: Travel group size, Jan–Jun 2024

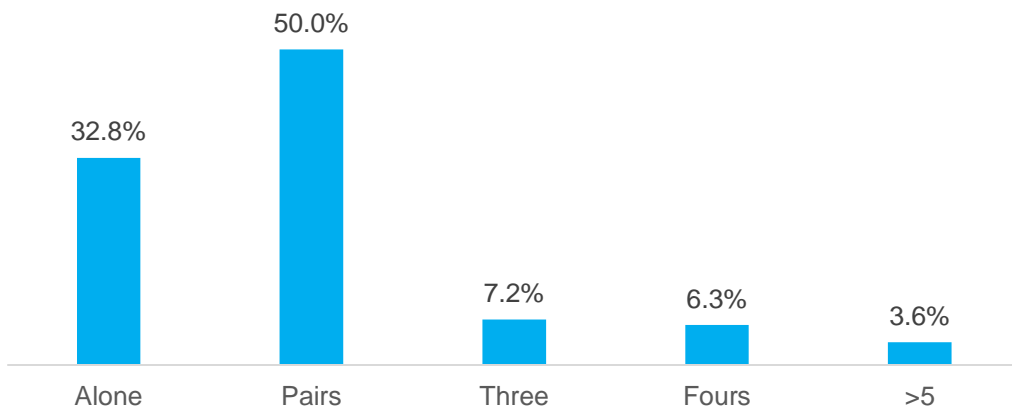
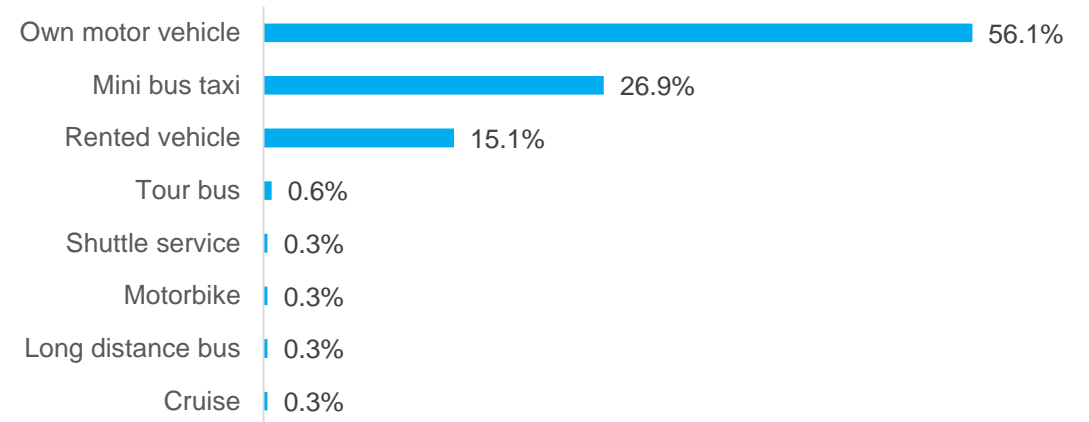
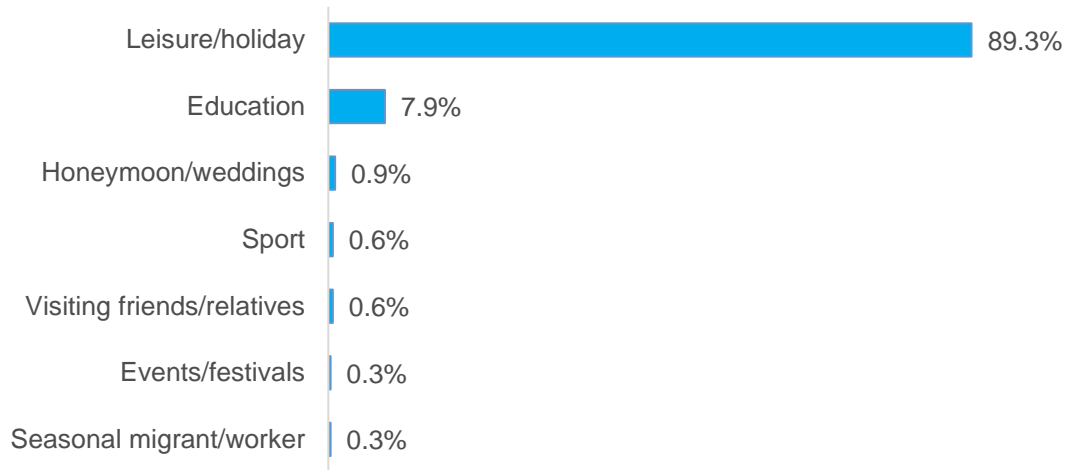


Figure 6: Mode of transport Jan–Jun 2024



4. Winelands Visitor Trends & Patterns

Figure 7: Purpose of visit to the Winelands, Jan–Jun 2024



- The highest motivating aspect for travel to the Winelands was for holiday/leisure (89.3%) and educational purposes (7.9%). This can be seen in Figure 7.
- In Figure 8, it is shown that the internet and websites were the primary sources of information for 37.4% of visitors during this period. Additionally, 30.0% of visitors decided to visit the region based on their previous visits, and 16.5% of visitors obtained information through word of mouth.
- Figure 9 shows the top tourism activities in the region. Most visitors (69.8%) enjoyed cultural and heritage activities, including museum and township tours, while 65.3% favoured outdoor activities during their travels.
- Discovering the Winelands offers an enriching journey, with 61.9% of visitors savoring the experience of local wine farm visits and wine-tasting events. In addition, scenic drives were undertaken by 54.7% of visitors.

Figure 8: Top information sources, Jan–Jun 2024

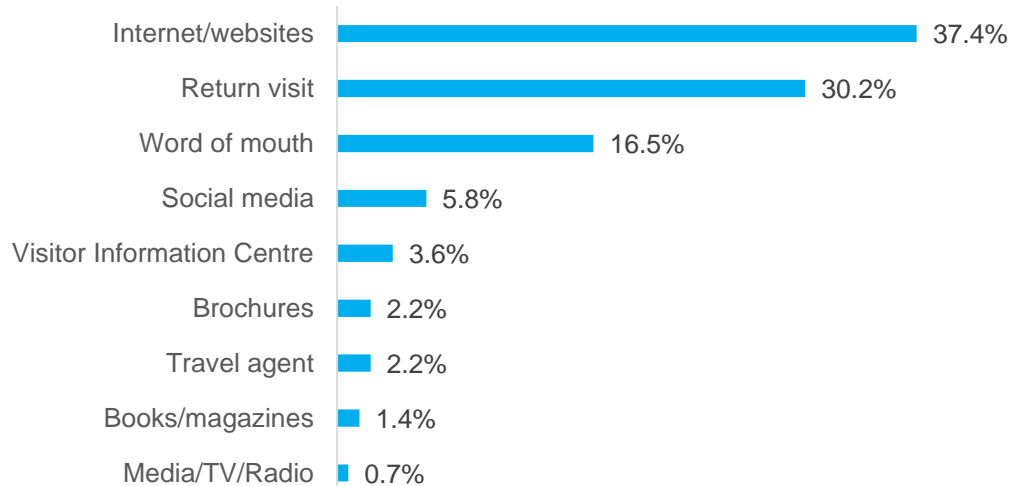
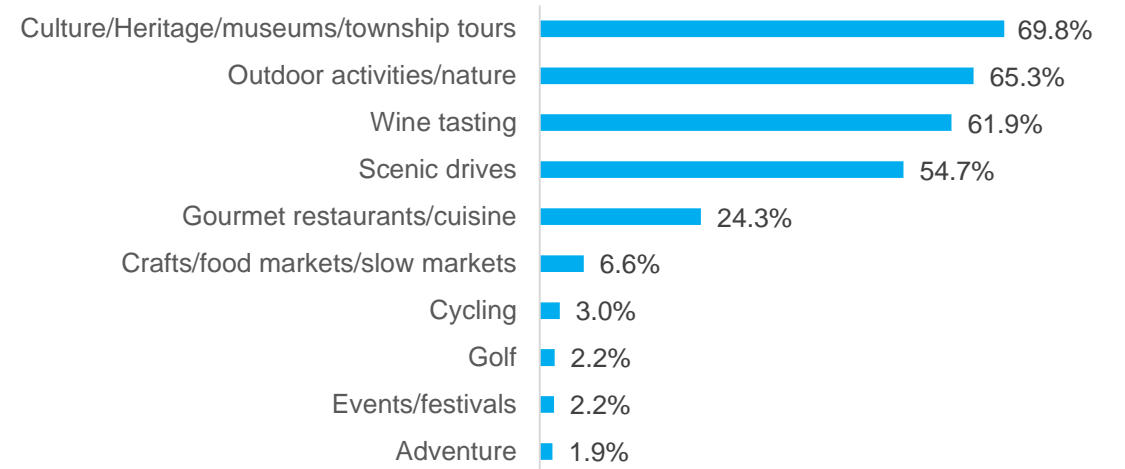
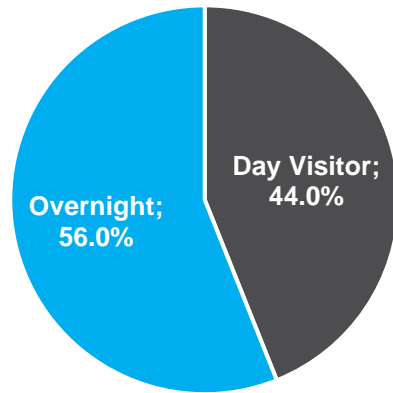


Figure 9: Top 10 activities undertaken in the Winelands, Jan–Jun 2024



4. Winelands visitor trends & patterns

Figure 10: Overnight and day visitors in the Winelands region, Jan–Jun 2024



- Figure 10 shows that 56.0% of visitors took day trips to the Winelands and overnight stays accounted for 44.0%.
- A positive trend in the average length of stay from 36.8% of visitors stayed for two nights while 18.9% stayed for even longer periods of 7 nights and more. This can be seen in Figure 11.
- Figure 12 illustrates that guesthouses, hotels, and self-catering establishments were the most popular types of lodging for travellers visiting the Winelands region.

Figure 11: Average length of stay in the Winelands region, Jan–Jun 2024

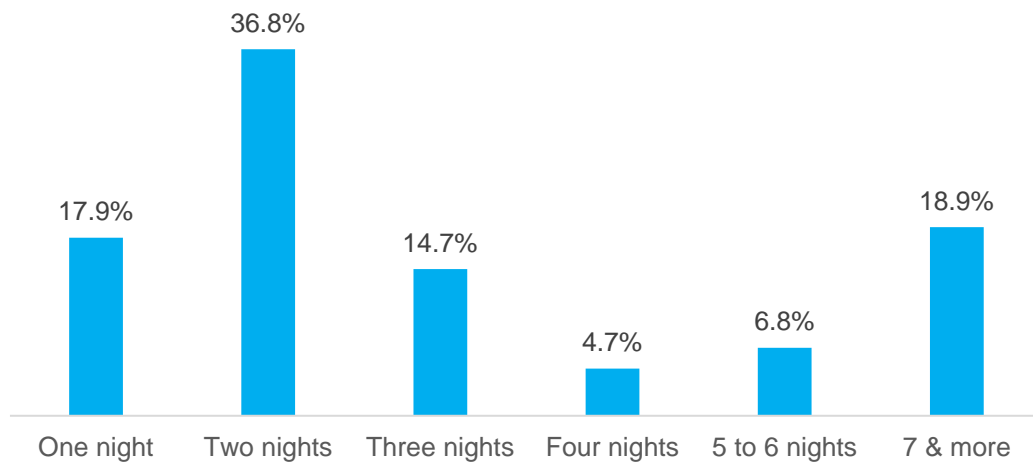
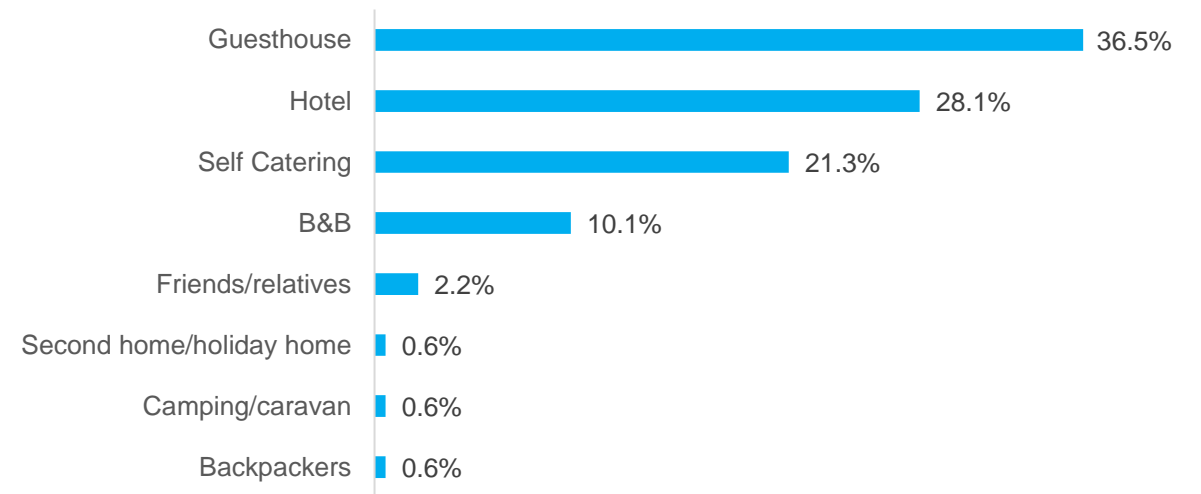
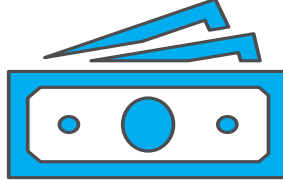
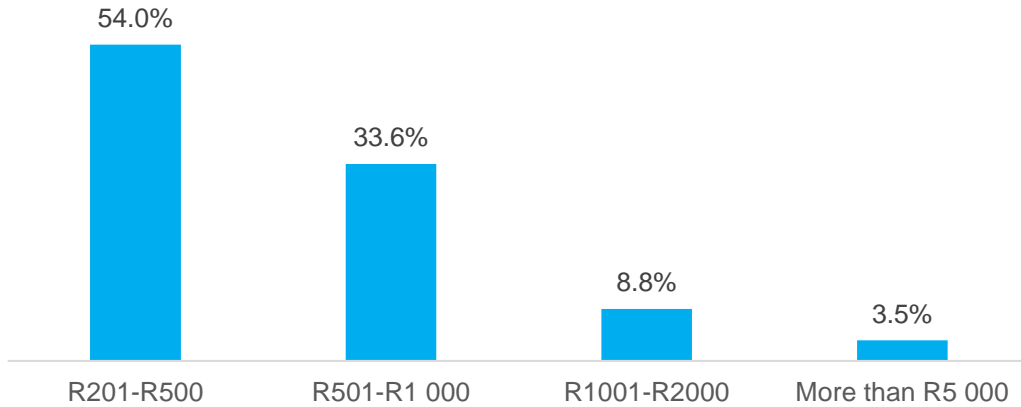


Figure 12: Visitors accommodation usage, Jan–Jun 2024




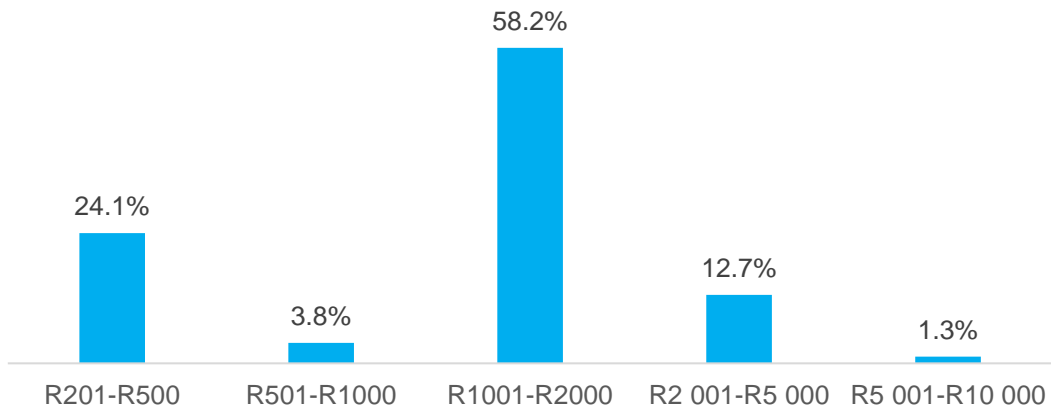
4. Winelands Visitor Trends & Patterns

Figure 13: Visitor's average daily spend, Jan–Jun 2024



- Over 50.0% of visitors to the Winelands spent between R201 and R500 per day in the region, followed by 33.6% who indicated an average expenditure of R501–R1 000 while 8.8% indicated an average spend of between R1001–R2000.

Figure 14: Average spend on accommodation by visitors, Jan–Jun 2024



- With regards to spending on accommodation, just over 58% of visitors spent between R1001–R2000, followed by 24.1% who indicated an expenditure of R201-R500 per day.

An aerial photograph of a coastline with mountains and the ocean. The mountains are in the background, and the ocean is in the foreground. The sky is clear and blue. The water is a deep blue color. The mountains are a mix of green and brown. The overall scene is bright and clear.

Langeberg Visitors & Attractions

Review Period: Jan–Jun 2024

5. Langeberg Visitor Trends

- The Langeberg Local Municipality falls within the Cape Winelands District Municipality in the Western Cape Province. The region is bordered by the Breede Valley Municipality to the north and west and by the Overberg District to the south and east.
- Figure 15 shows that more than 248,000 people visited the Langeberg region in 2024, a positive increase of 5.2% when compared to 2023 visitor arrivals.
- The town of Montagu continues to attract an influx of visitors, with a total of 332,204 arrivals from January to June 2023 and January to June 2024 combined. During the same period (January to June 2023 & 2024), Robertson welcomed 129,430 visitors, while McGregor saw an increase of 23,553 visitors.

Figure 15: Total Tourist Arrivals in Langeberg, Jan–Jun 2019–2024

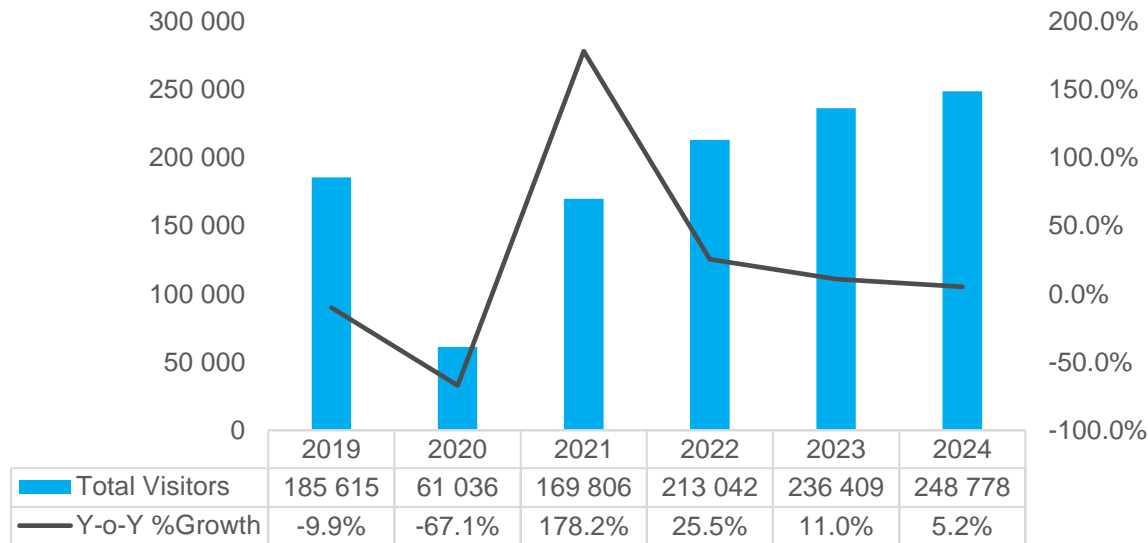
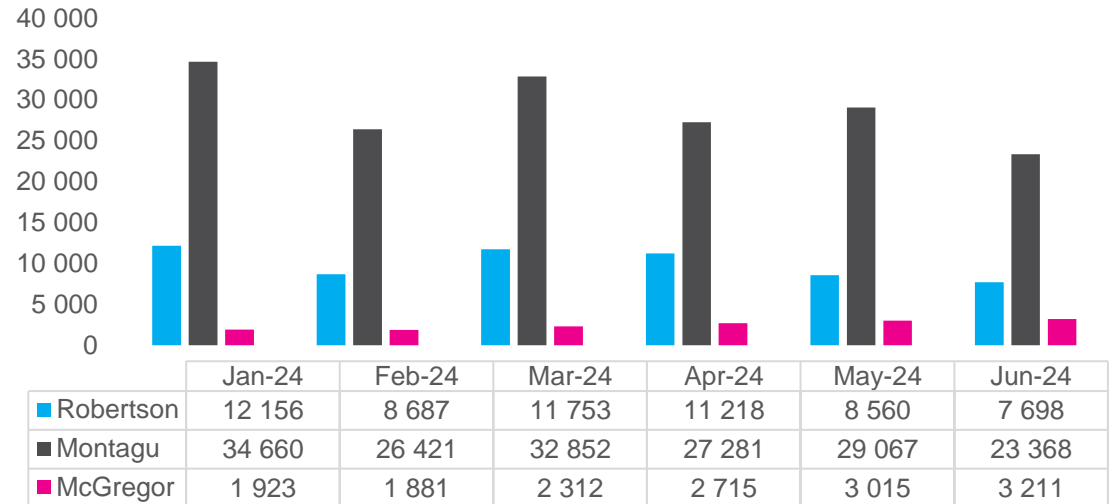
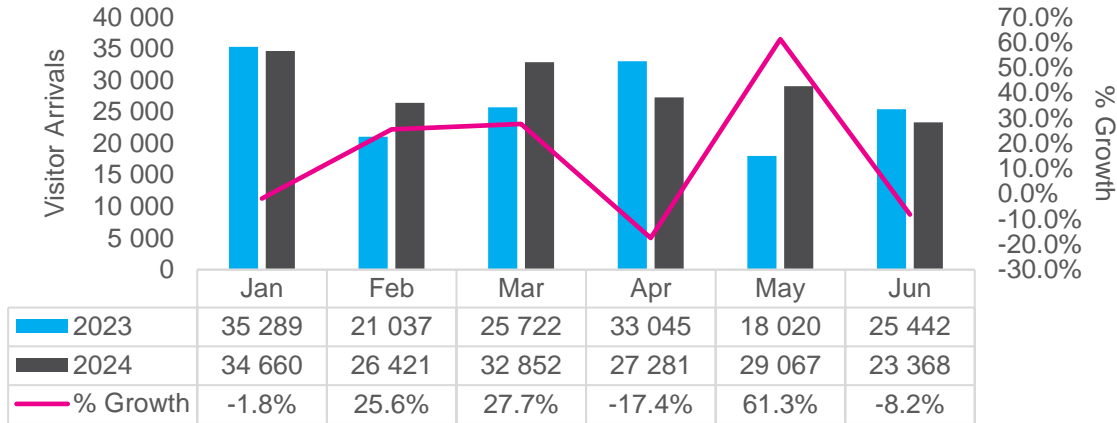


Figure 16: Visitor Arrivals in (Robertson, Montagu & McGregor), Jan–Jun 2024



5. Langeberg Visitor Trends

Figure 17: Montagu visitor arrivals, Jan–Jun 2024



- Figures 17, 18, and 19 illustrate the number of visitors per town in the Langeberg area for the period from January to June in both 2023 and 2024. During the first half of 2024, Montagu recorded 173,649 visitor arrivals, followed by Robertson with 60,072 visitors, and McGregor with 15,057 visitors.

- Montagu experienced a positive year-on-year growth of 9.5%, and McGregor saw an impressive increase of 77.2% in visitor arrivals compared to the same period in 2022 (January to June). In contrast, Robertson recorded a decline of 13.4% in visitor arrivals.

Figure 18: Robertson visitor arrivals, Jan–Jun 2024

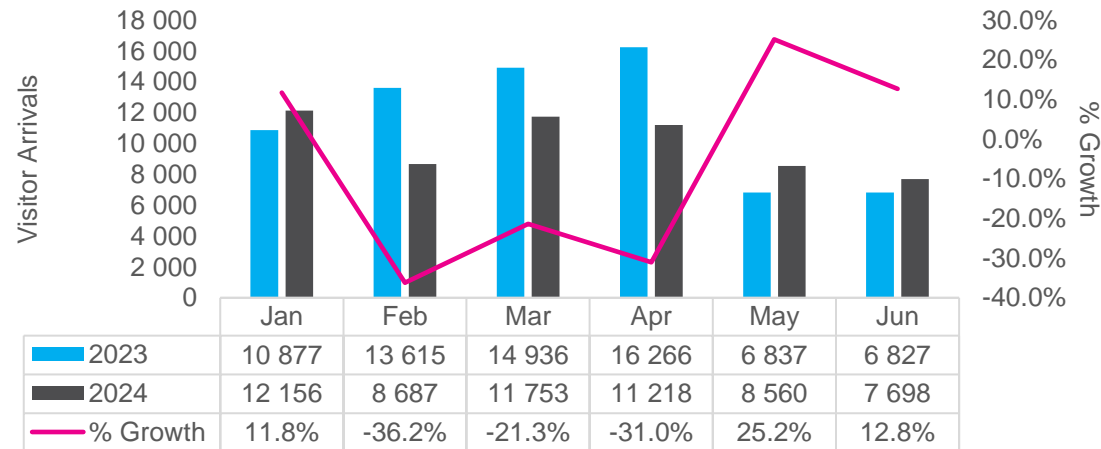
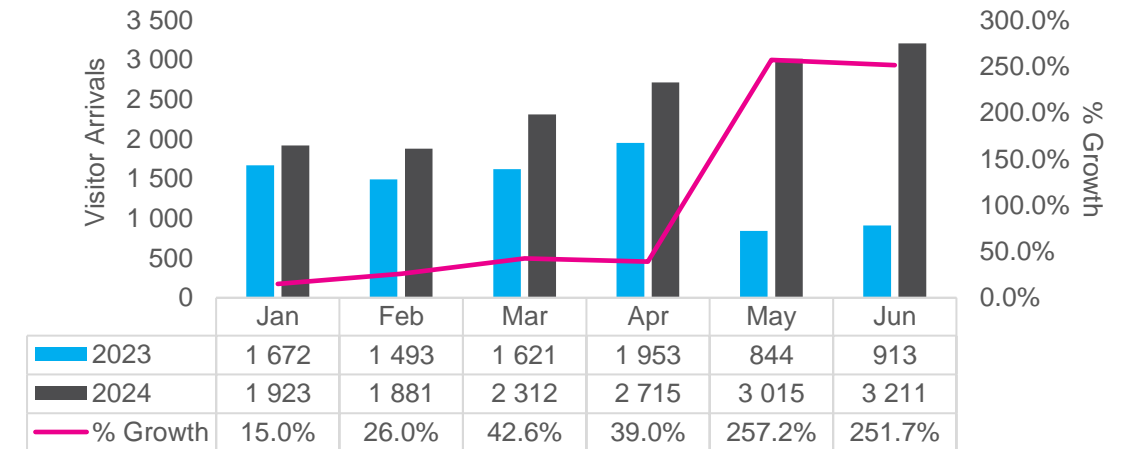


Figure 19: McGregor visitor arrivals, Jan–Jun 2024



5. Langeberg Attractions

- Figure 20 shows the total number of visitors to attractions in the Langeberg municipal area between January and June in 2023 and 2024. Over the period, the number of visitors to attractions in the region increased by 37.2% to reach 33,033 persons in 2024, up from 24,072 visitor arrivals recorded over the period in 2023
- The individual attractions in the Langeberg area are shown in Table 1 below. Viljoensdrift River Cruises had the most visitors from January to June 2023 with a total of 11,352 arrivals, followed by in Avalon Springs 7,413 and Birds Paradise 4,552.
- Table 2 shows the combined annual growth rate for the available attractions between Jan-Jun (2023–2024). The highest y-o-y % growth in arrivals was seen from Avalon Springs 69.5% followed by Viljoensdrift 54.0% and Eseltjiesrus Donkey Sanctuary 53.0%. A positive y-o-y percentage growth in the number of visitors was also observed at several other attractions, including the Wahnfried 49.6%, Flying feet 33.4% Birds Paradise 16.5 %.

Figure 20: Total Visitors to Langeberg Attractions Jan–Jun (2023 vs 2024)

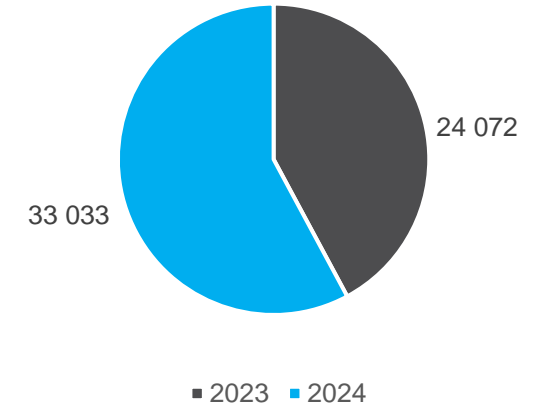


Table 1: Langeberg Attractions (2024)	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24
Birds Paradise	802	1 276	830	475	349	820
Viljoensdrift River Cruise	2 318	3 773	2 293	1 242	1 025	1 725
Protea Tractor Trips	422	386	431	305	265	392
Avalon Springs Day Visitors	2 498	882	1 167	977	699	1 190
Wahnfried	135	199	347	311	145	236
Lords Wines	245	160	245	198	319	345
Nerina Guest Farm	0	25	86	30	13	0
Flying Feet	101	79	132	120	76	43
Eseltjiesrus Donkey Sanctuary	676	285	940	569	821	939

Table 2: Langeberg Attractions, (Jan–Jun 2023 v 2024)	Jan–Jun 2023	Jan–Jun 2024	Y-o-Y % Growth
Birds Paradise	3 908	4 552	16.5%
Viljoensdrift River Cruise	7 371	11 352	54.0%
Protea Tractor Trips	1 973	1 896	-3.9%
Avalon Springs Day Visitors	4 373	7 413	69.5%
Wahnfried	918	1 373	49.6%
Lords Wines	2 144	1 512	-29.5%
Nerina Guest Farm	208	154	-26.0%
Flying Feet	413	551	33.4%
Eseltjiesrus Donkey Sanctuary	2 764	4 230	53.0%

An aerial photograph of a coastline with mountains and the ocean. The mountains are in the background, and the ocean is in the foreground. The sky is clear and blue.

Performance of CapeNature Reserves

Review Period: Jan–Jun 2024

6. Cape Nature Visitor Trends

- The attractions included in this report are participating attractions from Cape Nature which are shared with Wesgro. Cape Nature is a government entity responsible for managing and maintaining 31 nature reserve complexes comprising 112 nature reserves and is found in the Western Cape province only.
- The Cape Winelands hosts a total of six nature reserves around the region. Between January and June 2024, a total of 21 977 visitors were welcomed, reflecting a positive growth of 5.6 % when compared to 2023.
- Tucked away in the Du Toitskloof Mountains near Paarl, Limietberg Nature Reserve had the highest visitor arrivals share in the region totaling 9,653. This was followed by Jonkershoek Nature Reserve 4,995 and Vrolijkheid Nature Reserve 3,306. Assegai Nature Reserve received a striking 108.3% growth in arrivals when compared to 2023 figures.

Figure 24: Total Visitors at Cape Nature Reserves in the Winelands, Jan–Jun 2024

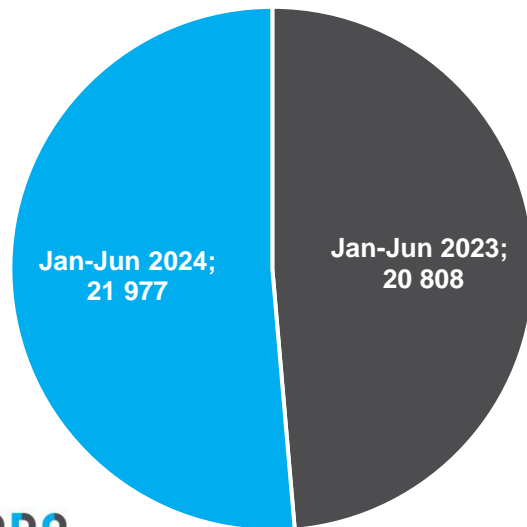
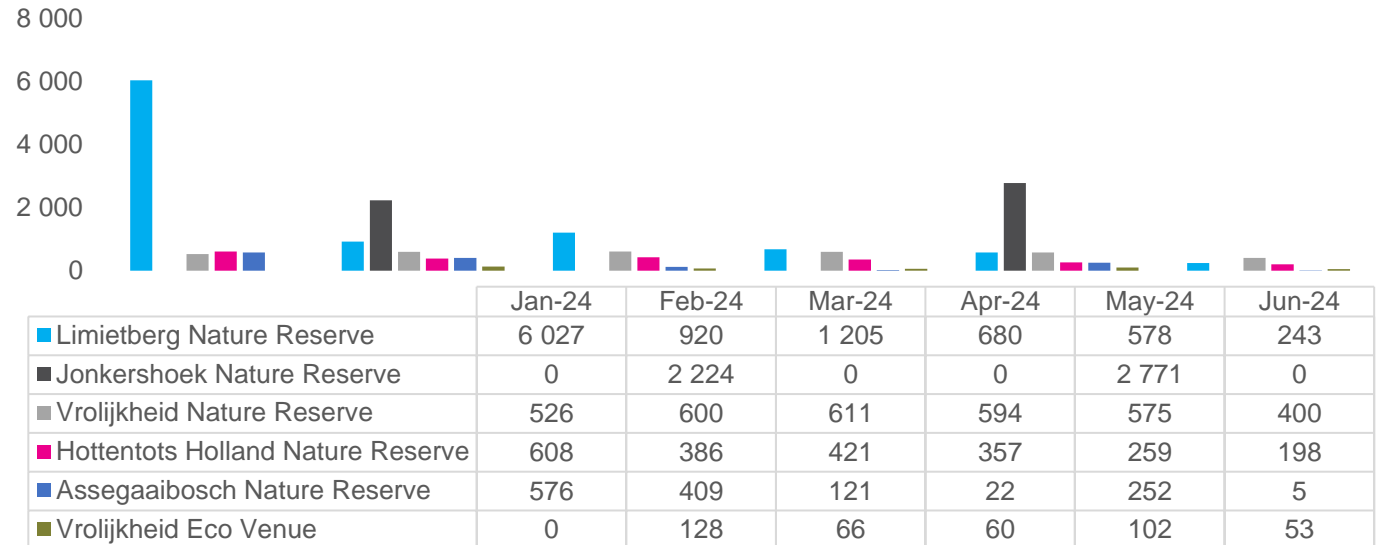


Figure 25: Total Visitors to Cape Nature Parks in the Winelands, Jan–Jun 2024





Stellenbosch Wine Valley Route

Mobile Location Data Insights

7. Mobile Location Data Insights: Methodology

What is mobile location data?

- This is Geo or spatial data from smartphones. When a user installs an app, they are often asked to share their location data with the company which provides the app, and other companies who are partners with the app publisher.
- Users can “opt in” to location sharing (or choose not to “opt in”). When they opt in, then their phone collects data and shares it with the publisher companies.
- All data collected is anonymised and does not include any personally identifiable information.

Why use mobile location data insights?

- Mobile location-based data offers a more granular lens on visitor behaviour and provides a much larger sample size.
- These insights aim to facilitate a better understanding of visitor movement throughout the Western Cape’s six regions.
- Mobile location data serves as a sample. It does not represent 100% of visitors, and it should not be treated as such. Like any sampling method, it can be subject to biases or lack of volume.

Factors influencing the international and domestic sample counts:

The volume of mobile location data capture counts is influenced by several factors including but not limited to:

Data Source Variability

- Changing volume of mobile applications collecting and sharing data
- Data privacy and regulatory changes affecting sharing of data (GDPR, mobile OS policy changes etc.)

Data Collection and Processing Variability

- Mobile network and internet connectivity
- Mobile infrastructure technical issues (hardware failures, solar flare activity)
- Tourist logic to segment tourist from non-tourist mobile devices

Mobile Use Variability

- Tourists disabling data transmission services due to high international data costs
- Tourists not using partnership apps as often.

While all mobile devices are affected by the above, International mobile device counts are affected more than Domestic mobile devices when it comes to both mobile use fluctuations and data privacy restrictions. Tourists use their phones differently when travelling internationally – they may want to avoid additional out of country fees and only use their phone through wi-fi service. Tourists may not use the partnership apps they normally do while on extensive holiday. Restricting data privacy laws are also affecting the international landscape affecting data that can be shared which may affect processing that identifies tourists.

8. Stellenbosch Valley Wine Route

- From a sample size of 9,780 tourists who visited the Stellenbosch Wine Route, 8,448 were locals, 1,283 were domestic, and 49 were international.
- Spier Hotel & Wine Farm continues to be the most visited point of interest on the route with 44.3% of tourists. This was followed by Skilpadvlei (10.5%) and Zevenwacht Wine Estates (8.6%).
- With respect to the average hours spent at the listed wine farms, Middelvlei Wines (3.6 hours) and Zevenwacht Wine Estate (3.0 hours) reflected the longest dwell time from Jan-Jun 2024.

Figure 21: Number of visitors to Stellenbosch Wine Valley, Jan–Jun 2024

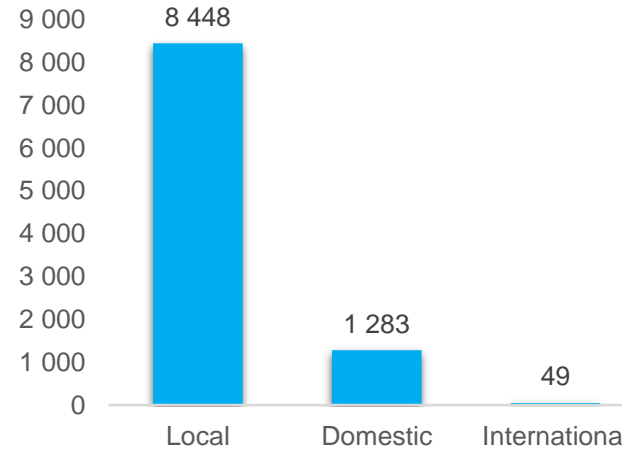


Figure 22: Top 10 Points of interest (POIs) visited, Jan–Jun 2024

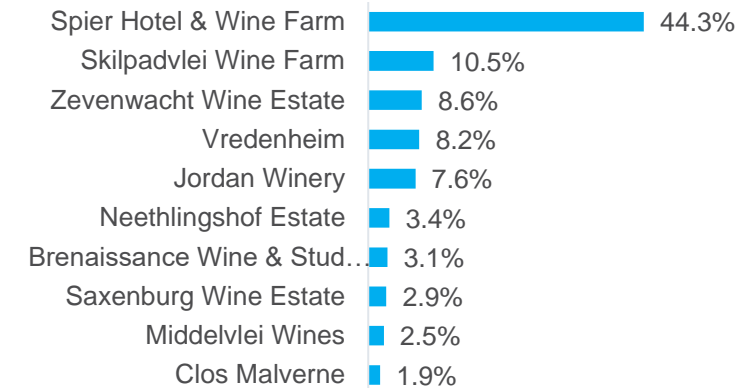
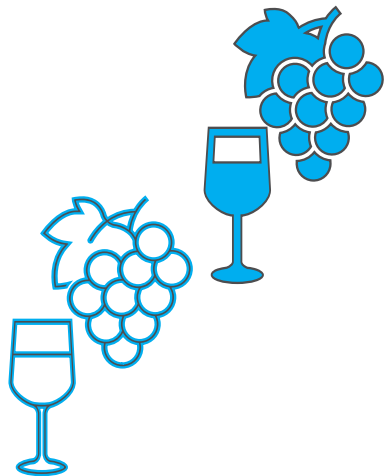
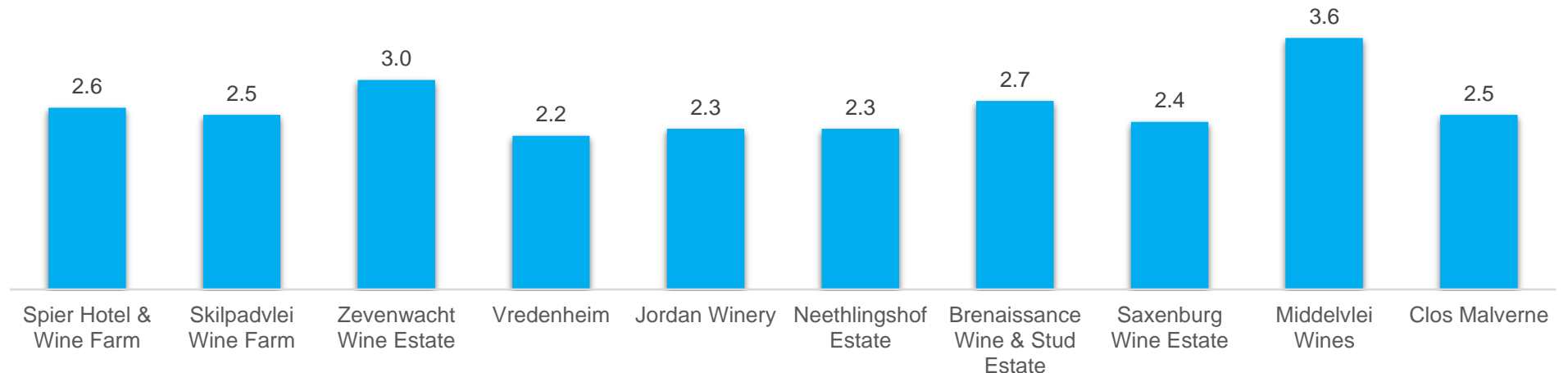


Figure 23: Average hours spent at points of interest (POI's), Jan–Jun 2024



9. Acknowledgements

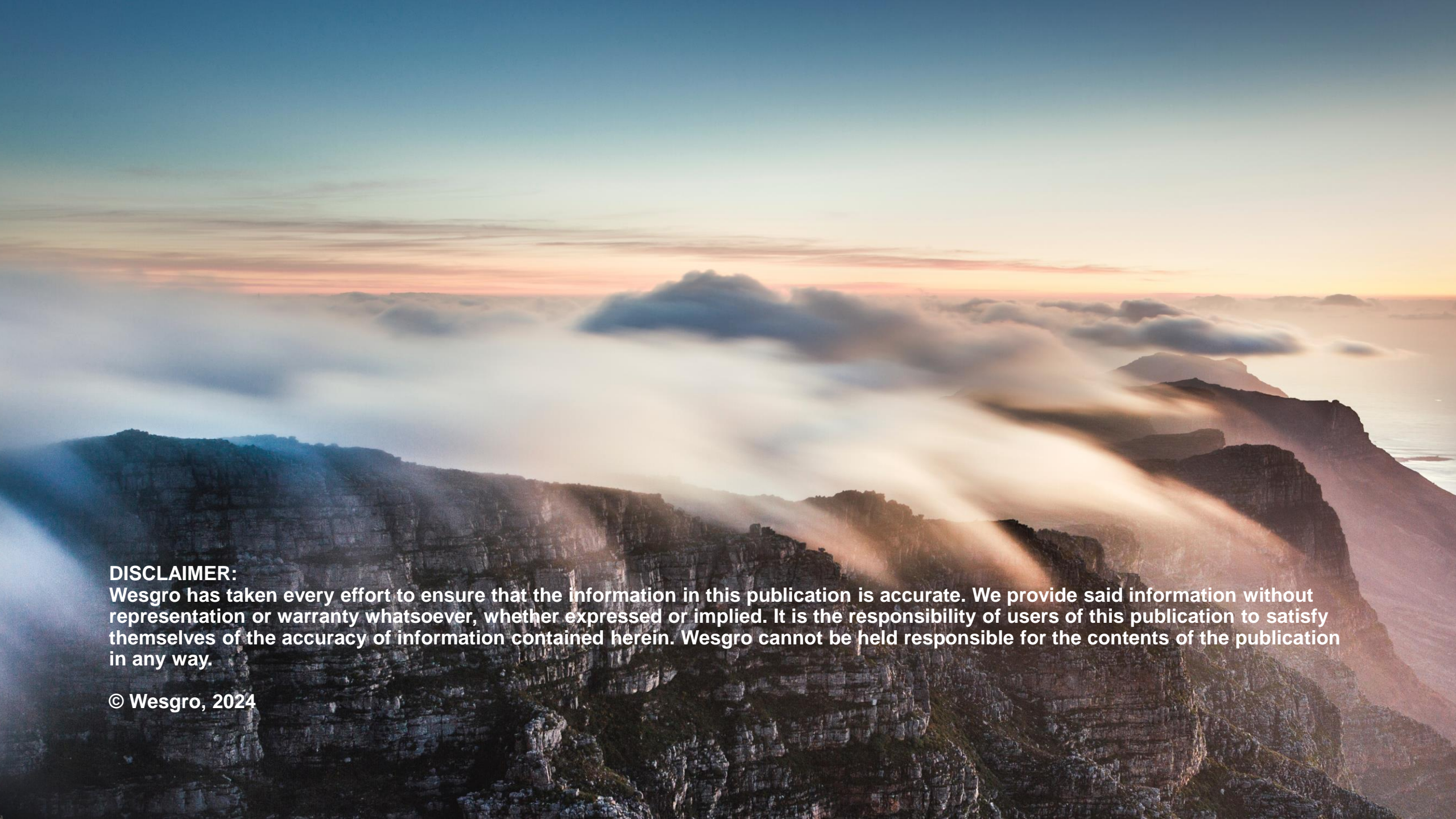
Acknowledgements and many thanks go to the Winelands District Municipality and the following tourism offices and attractions for supplying the data which made this publication possible and whose continued and unwavering support will sustain the forthcoming issues.

The participating local tourism offices in the Winelands included:

- Ceres
- Paarl
- Tulbagh

Other Sources:

- Langeberg Municipality
- Rove Marketing powered by Near
- CapeNature



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