

An aerial photograph of a coastal road in the Western Cape, South Africa. The road is a two-lane asphalt road that curves along the edge of a steep, rocky cliffside. The cliffside is covered in sparse, dry vegetation. In the background, there are several large, rugged mountains under a bright blue sky with scattered white clouds. The ocean is a deep blue, and white waves are breaking against the rocky shore. The overall scene is scenic and picturesque.

Tourism Research Overview

February 2022

Cape Town & the Western Cape

WESGRO

cape town & western cape
tourism, trade, investment, film

An Inspiring Place To Do Business

Key Findings

- February 2022 marked the highest (125,861) number of two-way (sum of arrival and departure passengers) **international terminal** passengers over the last five months and grew by 28% from the 98,211 two-way passengers recorded in January 2022. Two-way passengers through the **domestic terminal** reached a recovery rate of 71% in February 2022 when compared to the same month in 2019.
- Hotel occupancy grew from 23% in February 2021 to 60% in the same month this year, representing a recovery rate of 75% when compared to February 2019. Data obtained from 27 participating attractions across the province reflected a 93% growth in the number of visitors when compared to February 2021, and nearly half of what it was in February 2019.
- Based on mobile location data insights from 53 810 domestic and 939 international tourists, the Cape Winelands was the most popular region for domestic visitors in February and international tourists were found mostly in Cape Town. Domestic tourists spent the longest time in the Garden Route & Klein Karoo (3,2 days) and the international tourists spent on average 3,7 days in Cape Town.
- Garden Route & Klein Karoo was a popular region for domestic overnight stays and the Cape Winelands saw the largest share of domestic repeat visits. Cape Overberg and Cape Town saw the most repeat visits from the international tourists. Domestic visitors to the province were most likely to arrive on a Monday or Friday and depart on a Sunday, while international visitors mostly arrived on a Monday and departed on a Monday or Friday.
- Shopping and markets was the most popular type of attraction visited by both domestic and international tourists. The V&A Waterfront Precinct in particular ranked as the top shopping centre visited among both domestic and international sampled tourists. Natural attractions, particularly Table Mountain and Cape Point were popular with both domestic and international tourists. Bars & Pubs in the city centre were the third most popular point of interest for both the domestic and international tourists. On average both domestic and international tourists spent around 3 hours at their location.
- Roadways & walkways (Sea Point Promenade, Hermanus Market Square, Cederberg Wilderness Area, Hemel-en-Aarde Valley, Stanford Valley and Clarence Drive) ranked fourth among the top POIs visited by domestic tourists, and fifth among international tourists, with an average dwell time of 2,9 hours respectively.
- From a sample size of 1 022 tourists who visited the Stellenbosch Wine Route, close to 80% were locals, 21% were domestic and around 2% were international tourists. Spier was the most visited farm on the route, followed by Skilpadvlei and Zevenwacht.
- The biggest volume of online conversations about the Western Cape was around outdoor activities. The highest sentiment was driven by *Relaxation + Wellness* and *Amenities + Entertainment* at a score of 32 respectively. The high sentiment in *Relaxation + Wellness* was driven by beaches (33), shopping (30) and spa +wellness (25). Nightlife (48) scored the highest sentiment under the *Amenities + Entertainment* category.

1. CPT International Terminal Passenger Performance

Year/Month	2019	2020	2021	2021			2022		
				Oct	Nov	Dec	Jan	Feb	Mar (01-21)*
Two-way passengers	2 606 398	810 811	525 441	71 175	96 232	76 522	98 211	125 861	104 082
Passenger recovery*	100%	31%	20%	34%	38%	27%	35%	52%	58%
Average load factor	82%	63%	46%	Arr 47%	Arr 67%	Arr 61%	Arr 65%	Arr 76%	Arr 70%
				Dep 58%	Dep 59%	Dep 55%	Dep 67%	Dep 69%	Dep 80%

* Passenger recovery compared to same period in 2019

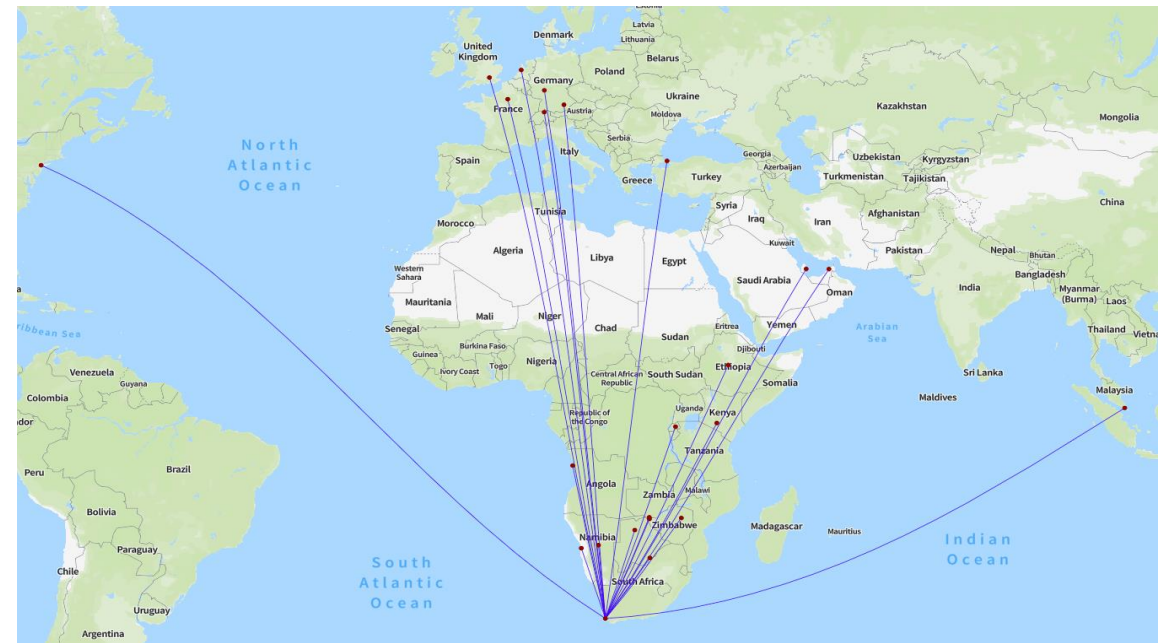
* March 2022 data preliminary

* Two-way passengers: The sum of arrival and departure passengers

* Average load factor: The % of available seats that is occupied on a flight

Passenger data source: ACSA

Operating carriers



Source: OAG Schedules Analyser

An Inspiring Place To Do Business

2. CPT DOMESTIC Terminal Passenger Performance

Year/Month	2019	2020	2021	2021			2022		
				Oct	Nov	Dec	Jan	Feb	Mar (01-21)*
Two-way passengers	8 363 307	3 167 542	4 221 365	467 159	457 599	520 508	479 942	462 219	336 635
Passenger recovery*	100%	38%	50%	65%	66%	66%	74%	71%	65%
Average load factor	78%	64%	67%	Arr 81%	Arr 77%	Arr 78%	Arr 73%	Arr 79%	Arr 81%
				Dep 80%	Dep 78%	Dep 72%	Dep 78%	Dep 76%	Dep 80%

* Passenger recovery compared to same period in 2019

* March 2022 data preliminary

* Two-way passengers: The sum of arrival and departure passengers

* Average load factor: The % of available seats that is occupied on a flight

Passenger data source: ACSA

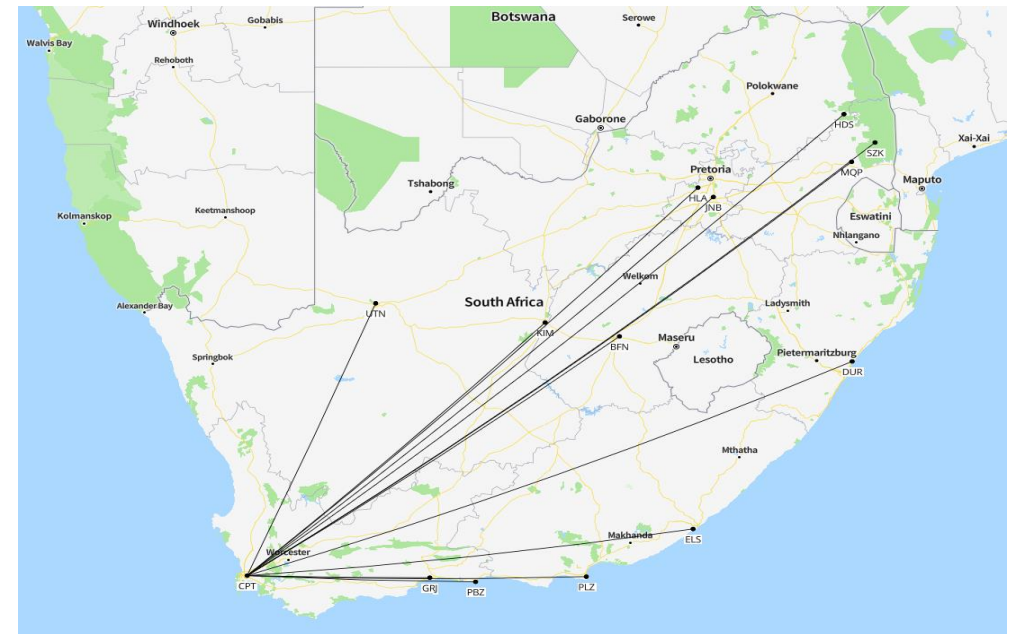
Operating carriers



SOUTH AFRICAN AIRWAYS



cape town & western cape
tourism, trade, investment, film



Source: OAG Schedules Analyser

3. George Airport (GRJ) Passenger Performance

Year/Month	2019	2020	2021	2021			2022		
				Oct	Nov	Dec	Jan	Feb	Mar (01-21)
Two-way passengers	832 981	340 438	536 886	59 536	56 129	70 708	57 371	53 820	40 904
Passenger recovery*	100%	41%	64%	84%	79%	73%	86%	87%	86%

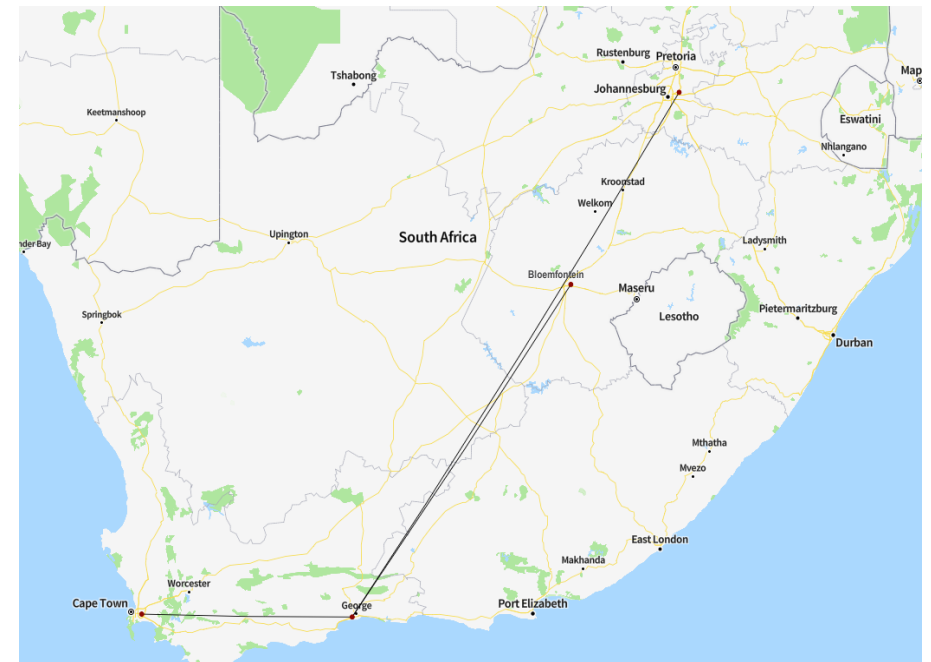
* Passenger recovery compared to same period in 2019

* March 2022 data preliminary

* Two-way passengers: The sum of arrival and departure passengers

Passenger data source: ACSA

Operating carriers




Source: OAG Schedules Analyser

4. CPT International Air Route Update: 03 March 2022

Asia and Middle East

-  **Emirates** resumed daily services from Dubai and will operate 10 times a week from 1 May 2022.
-  **Qatar Airways**, Doha, 10 times a week
-  **Singapore Airlines** started operating six times a week from 1 March and will go to a daily service on 28 March, SIN-JNB-CPT-JNB-SIN

Rest of Africa

-  **Air Botswana**, Gaborone, twice per week
-  **Ethiopian Airlines**, Addis Ababa, five times per week.
-  **FlyNamibia**, Windhoek, six times per week from 1 March.
-  **Kenya Airways**, Nairobi direct, once per week, Nairobi – Livingstone, twice per week and Nairobi - Victoria Falls, once per week
-  **TAAG**, Luanda, three times per week
-  **RwandAir**, Kigali-Harare, three times per week
-  **Airlink**, Windhoek, twice daily
Walvis Bay, daily
Harare, daily
Victoria Falls, four times per week
Maun, daily



Europe

-  **Lufthansa**, Frankfurt and Munich, five times a week each.
-  **British Airways**, London Heathrow, twice daily.
-  **Edelweiss**, Zurich, twice per week
-  **KLM**, Amsterdam, six times per week, daily from 11 July
-  **Turkish Airlines**, Istanbul, five times per week

North America

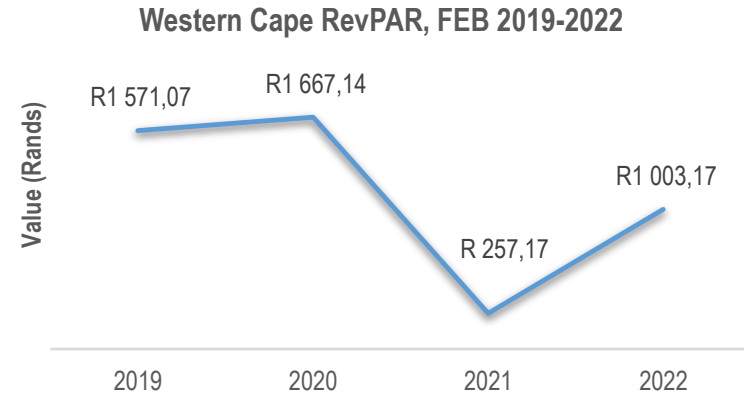
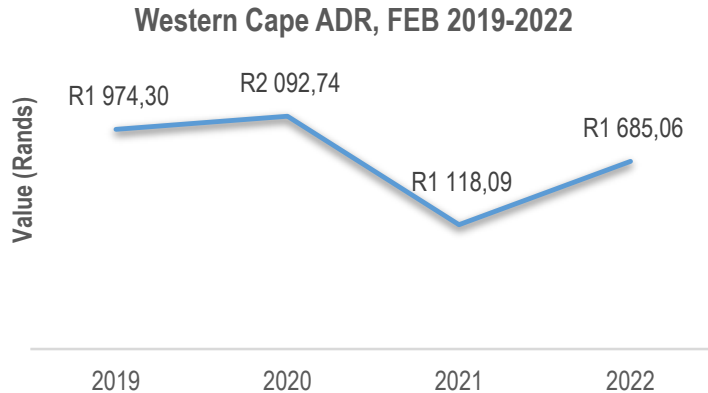
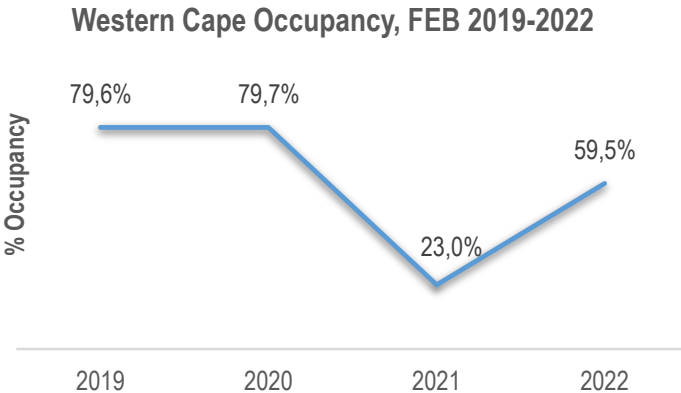
-  **United Airlines**, Newark, three times per week until end March, starting year-round on 5 June also three times per week.
-  **Delta Air Lines**, plans to operate three times per week from 18 November, Atlanta-Cape Town direct
- They are continuing with the application for a triangular route between ATL-JNB-CPT-ATL

Upcoming routes

-  **Virgin Atlantic**, London Heathrow restarting IATA Winter 22/23 (end Oct)
-  **Condor**, Frankfurt restarting IATA Winter 22/23 (end Oct)

5. Hotel Occupancy in the Western Cape

- **Occupancy** in the Western Cape reached **59,5%** in February 2022, and **more than doubled** when compared to 23,0% in the same month of 2021, reaching a **recovery rate of 75%** when compared to the 79,6% occupancy in February 2019.
- **The Average Daily Rate (ADR)** for the Western Cape grew to **R1, 685.06** in February 2022 with a **recovery rate of 85%** of its 2019 figure.
- At **R1, 003.17** in February 2022, **RevPAR (Revenue Per Average Room)** grew by **290%** on its 2021 figure and **recovered to 64%** when compared to February 2019.

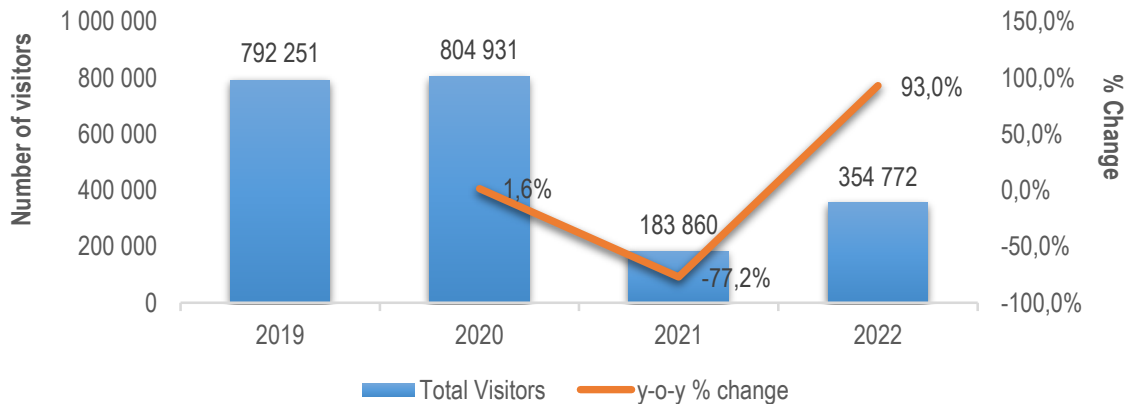


Source: STR Global, 2022

6. Western Cape Attractions

- Visitors to the 27 participating attractions across the province recorded a total of **354,772** in February 2022, a **93% growth in the number of visitors** when compared to February 2021, and nearly half of what it was in February 2019.
- All the attractions listed experienced significant year-on-year growth in visitor numbers this month, except for De Mond Nature Reserve (-18%), West Coast National Park (-24%), the Old Jail (-8%) and Viljoensdrift River Cruises (-13%), which saw a decline in visitors when compared to February 2021.
- However, despite year-on-year declines, **majority of these attractions recovered to more than half of its February 2019 figures.**

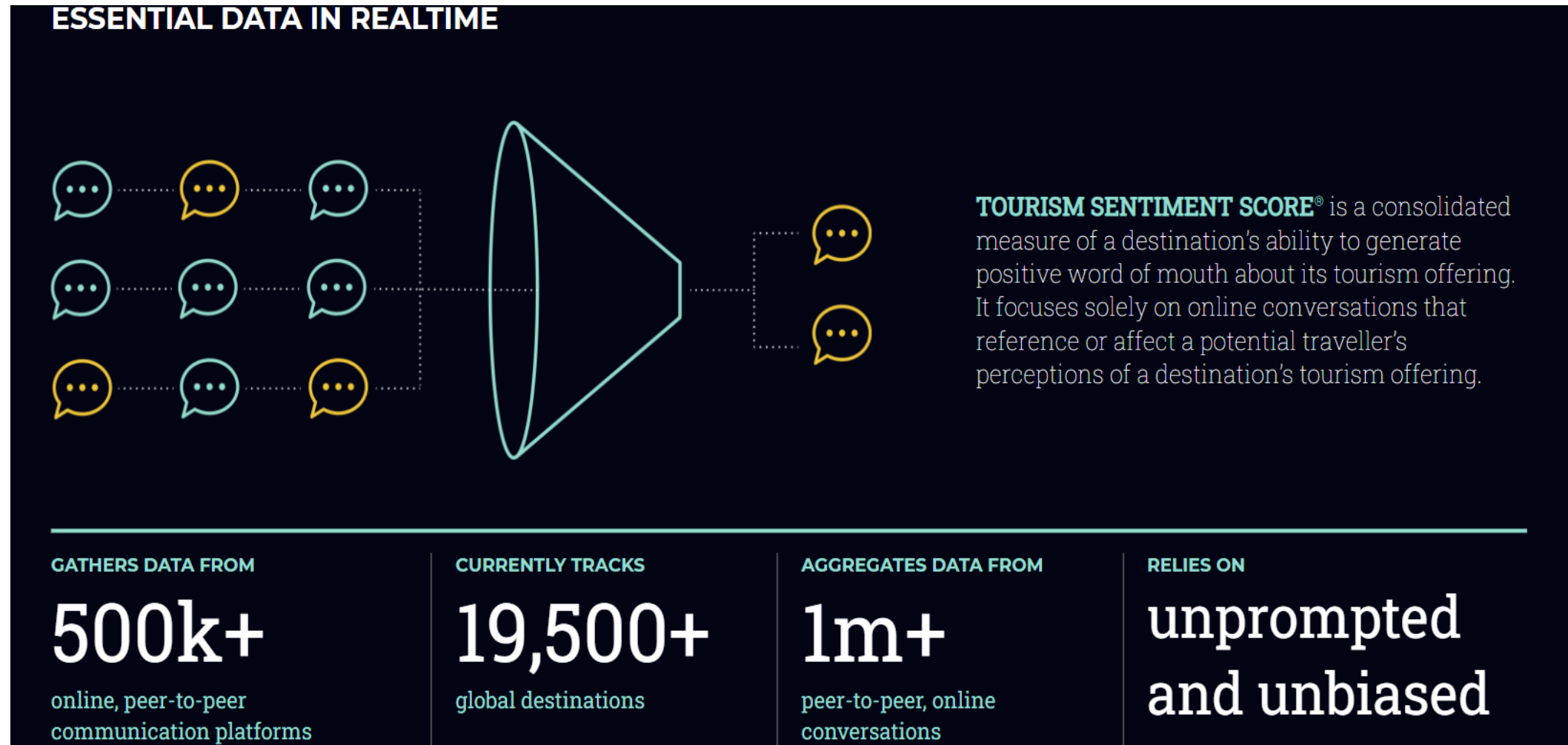
VISITORS TO PARTICIPATING WESTERN CAPE ATTRACTIONS, FEB 2019-2022



Attractions	Feb 2021/2022 % Change	Feb 2019/2022 Recovery %
Cape Town		
Table Mountain National Park	+111%	42%
Table Mountain National Park: Boulders	+206%	38%
Table Mountain National Park: Cape of Good Hope	+118%	39%
Table Mountain Aerial Cableway	+239%	43%
Kirstenbosch National Botanical Garden	+21%	60%
V&A Waterfront	+35%	-
Robben Island	+418%	27%
Cape Overberg		
Cape Agulhas Lighthouse	<i>No visitors recorded for Feb 21</i>	67%
Agulhas National Park	+728%	70%
Bontebok National Park	+19%	70%
De Hoop Nature Reserve	+120%	121%
De Mond Nature Reserve	-18%	83%
Harold Porter National Botanical Garden	+40%	136%
Kogelberg Nature Reserve	+131%	234%
Stony Point	+452%	58%
Shipwreck Museum	+216%	41%
Garden Route & Klein Karoo		
Cango Caves	+190%	21%
Wilderness National Park	+56%	87%
Tsitsikamma National Park	+63%	37%
Knysna National Park	+58%	97%
Weskus		
West Coast National Park	-24%	60%
!Khwattu	+81%	76%
Old Jail	-8%	79%
Cape Karoo		
Karoo National Park	+53%	95%
Cape Winelands		
Avalon Springs (day visitors)	+251%	199%
Protea Tractor Trip	+183%	78%
Birds Paradise	-24%	54%
Viljoensdrift River Cruises	-13%	72%

Tourism Sentiment Index (TSI) for the Western Cape:

7. Tourism Sentiment for the Western Cape



Source: TSI, 2022

7. Tourism Sentiment for the Western Cape



Source: TSI, 2022

7. Tourism Sentiment for the Western Cape

- Tourism Sentiment is based on **12 336 conversations** analyzed between 1 and 28 February 2022.
- The **biggest volume** of conversations was around **outdoor activities**.
- **Highest sentiment** was driven by **Relaxation + Wellness** and **Amenities + Entertainment** at 32 respectively.
- The high sentiment in **Relaxation + Wellness** was driven by beaches (33), shopping (30) and spa +wellness (25).
- **Nightlife (48)** scored the highest sentiment under the **Amenities + Entertainment** category.
- **Safety** drove the **lowest sentiment and volume**.

		WESTERN CAPE		
CATEGORIES	VOLUME COMPARISON	Volume	Emotion	Sentiment
▲ Outdoor Activities		33% ▲ 1%	Joy	25 Average
▲ Food + Culinary		20% ▲ 3%	Joy	29 Average
▲ Relaxation + Wellness		13% ▼ 2%	Joy	32 Average
▲ Access + Transportation		10% ▲ 4%	Joy	17 Average
▲ Amenities + Entertainment		9% ▼ 1%	Joy	32 Average
▲ Destination Services		6% ▼ 1%	Joy	31 Average
▲ Culture + History		6% ▲ 1%	Joy	22 Average
▲ Safety		3% ▼ 4%	Joy	-10 Average

Source: TSI, 2022

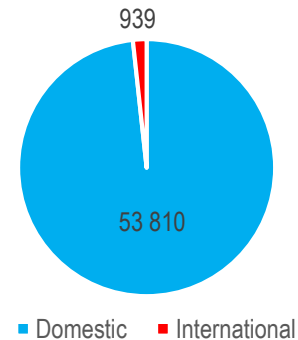
Visitor Trends Mobile Location Data Insights

8. Western Cape Mobile Location Data Insights

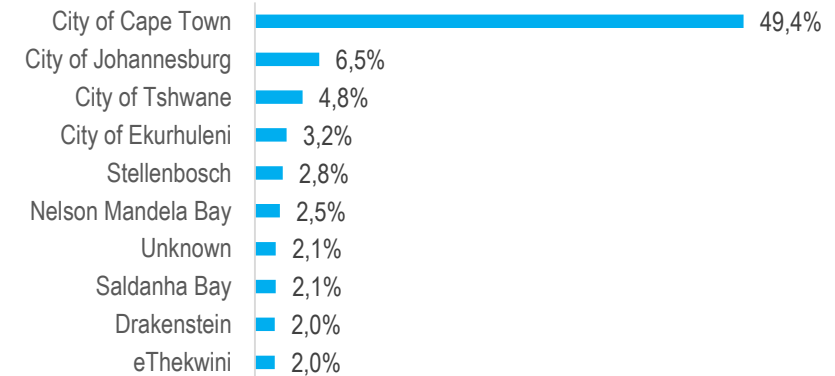
- What is mobile location data?
 - Geo or spatial data from smartphones. When a user installs an app, they are often asked to share their location data with the company which provides the app, and other companies who are partners with the app publisher.
 - Users can opt in to location sharing (or choose not to opt in). When they opt in, then their phone collects data and shares it with the publisher companies.
 - All data collected is anonymized 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 region.
 - Mobile location data serves as a sample. It is not 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.

The insights in this report represents mobile location data from a sample of **53 810 domestic** and **939 international** tourists who visited the Western Cape in February 2022. Within the domestic data set, close to half of the sampled tourists were from the City of Cape Town and from the international sampled tourists, 56% originated from the United States.

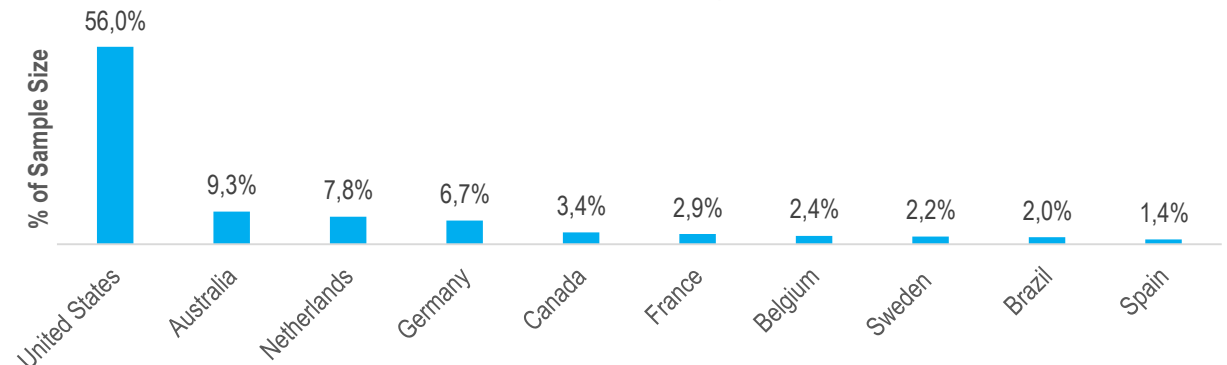
Sample Size: Feb 2022



Domestic Origin Municipality, Feb 2022



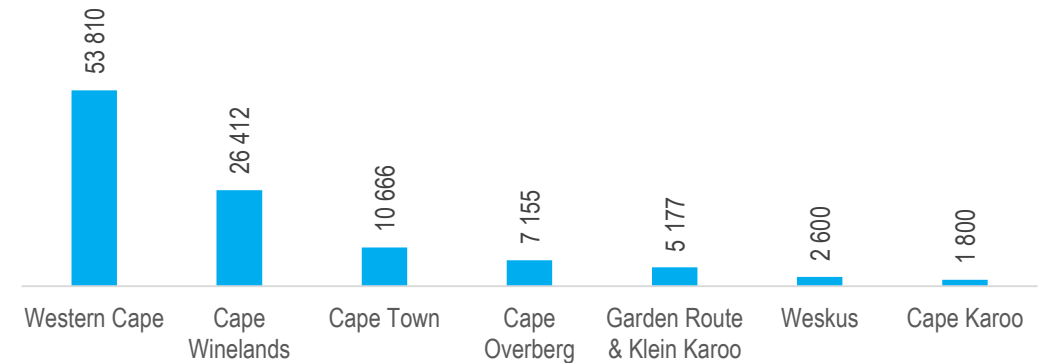
International Origin Country, Feb 2022



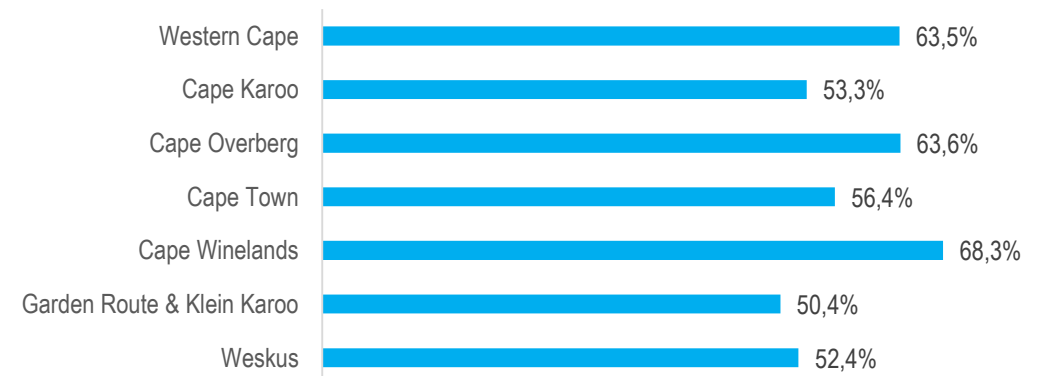
8.1. Mobile Insights: Domestic Visitor Trends

- In February 2022, the Cape Winelands (49%) and Cape Town (20%) saw the most domestic visitors in terms of volume of sample size and Cape Karoo (3%) had the least.
- The Cape Winelands (68,3%) was the most popular region for repeat visits, followed by the Cape Overberg (63,6%). Both regions had a higher repeater rate than the general average for the province (63,5%).

Sample Size by Region, Feb 2022

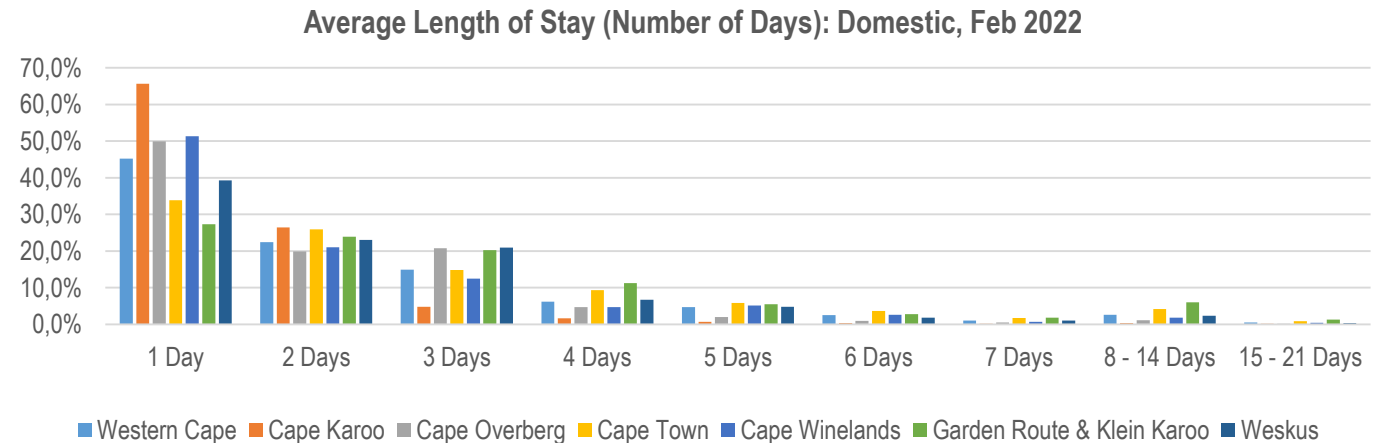
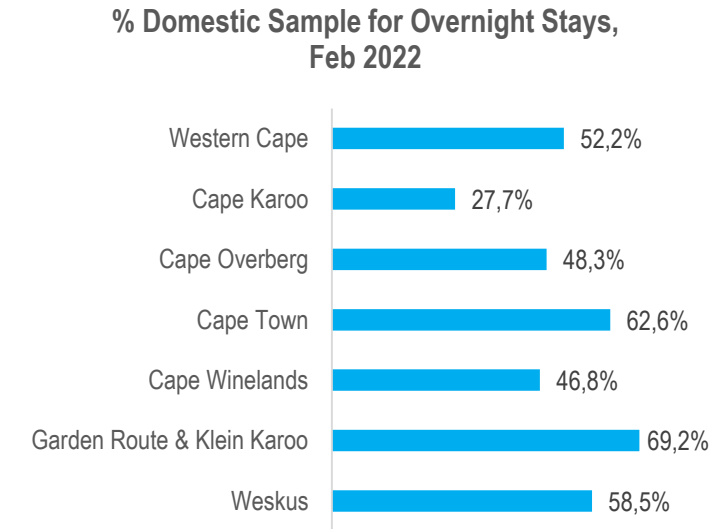
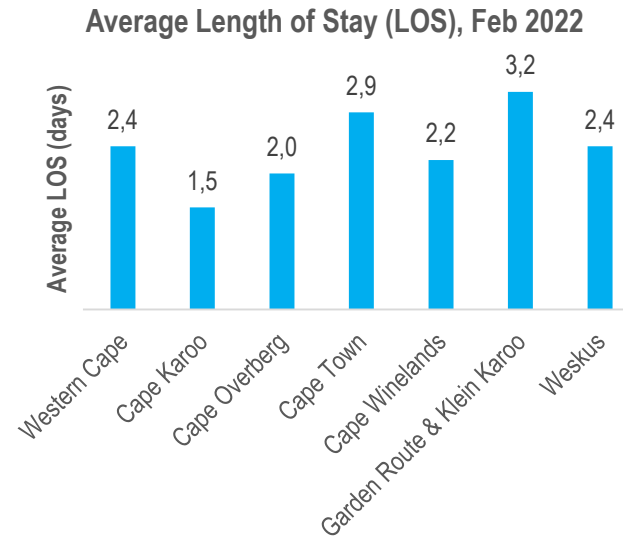


Domestic Repeat Visits by Region, Feb 2022



8.1. Mobile Insights: Domestic Visitor Trends

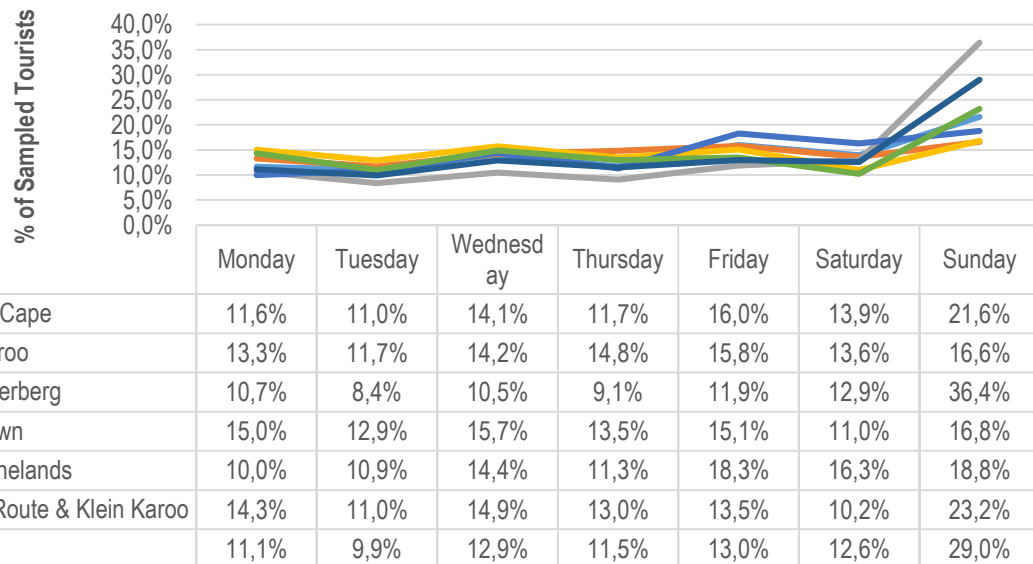
- On average, domestic visitors spent the longest time in the Garden Route & Klein Karoo (3,2 days) and the shortest time in the Cape Karoo (1,5 days).
- Nearly 70% of sampled domestic tourists stayed overnight in the Garden Route & Klein Karoo, which is higher than the general average for the province (52,2%). In contrast, domestic visitors to the Cape Karoo were more likely to stay for the day.
- An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.



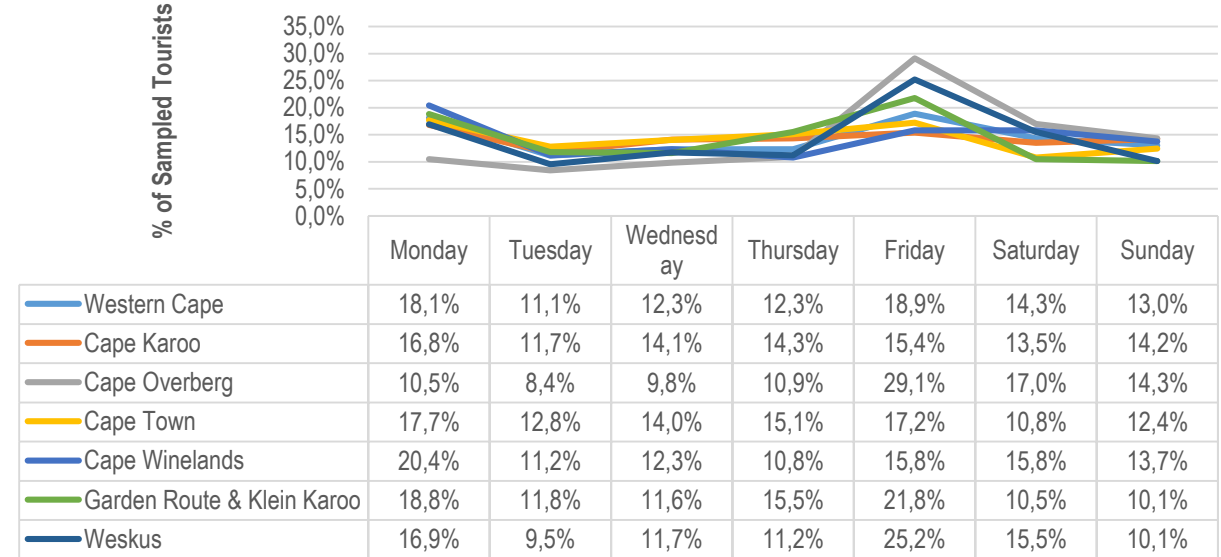
8.1. Mobile Insights: Domestic Visitor Trends

- Domestic visitors to the province are most likely to arrive on a Friday and depart on a Sunday.
- In the Cape Winelands, Monday (20,4%) ranked as the most popular arrival day and Sunday (18,8%) was the most common day for departure in February 2022.
- Domestic visitors to the Garden Route & Klein Karoo arrived mostly on a Friday (21,8%) or Monday (18,8%) and departed on a Sunday (23,2%) or Wednesday (14,9%).

Popular Departure Days of the Week: Domestic, Feb 2022



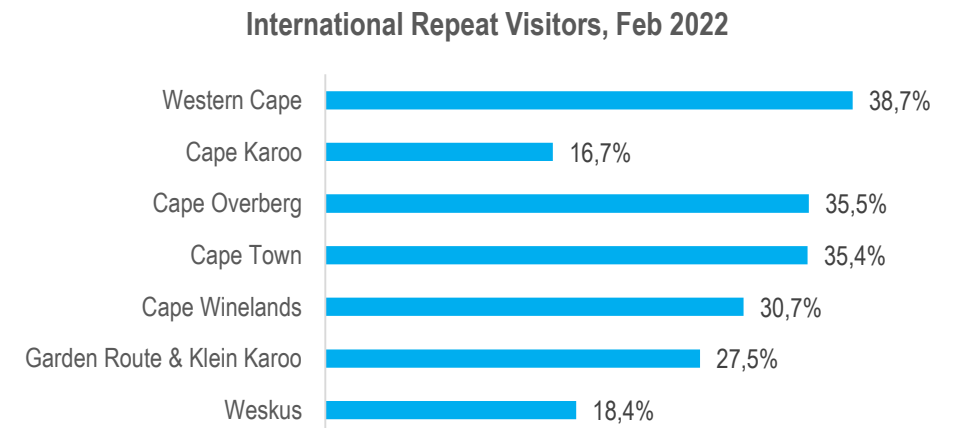
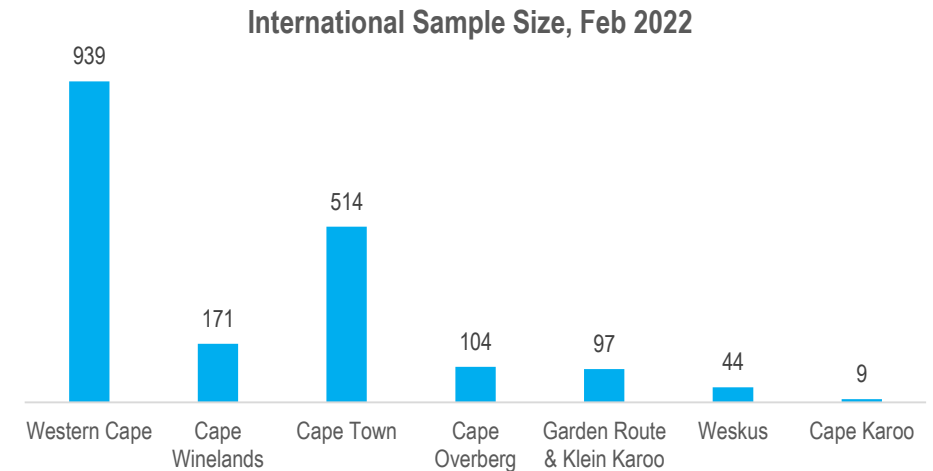
Popular Arrival Days of the Week: Domestic, Feb 2022



- In the Cape Karoo, which saw majority domestic day visitors, Monday and Friday were popular arrival days, while Sunday and Friday were the most popular departure days.
- Cape Town arrival days were most common on a Monday (17,7%) or Friday (17,2%). Departure was most popular on a Sunday (16,8%).
- Friday (29,1%) was the most popular arrival day in the Cape Overberg and Sunday (36,4%) was its most common departure day.
- In the Weskus, Friday (25,2%) and Sunday (29,0%) were also the most popular arrival and departure days, respectively.

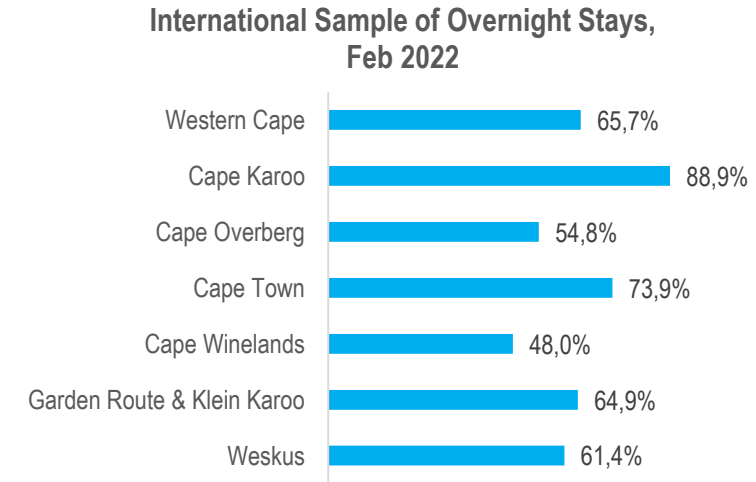
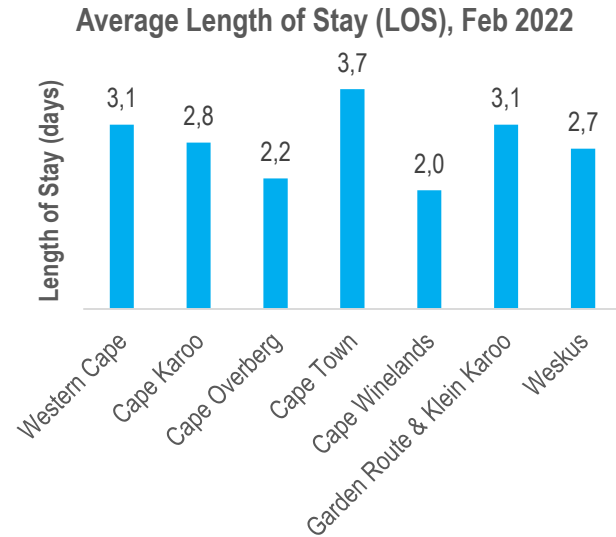
8.2. Mobile Insights: International Visitor Trends

- More than half of the sampled international tourists visited Cape Town followed by Cape Winelands (18,2%) and Cape Overberg (11,1%).
- In terms of volume, the Cape Karoo accounted for 1% of sampled international tourists tracked in February 2022. Visitor trends for that region is based on a sample size of only nine international tourists.
- Cape Overberg and Cape Town saw the most international repeat visitors in February 2022.

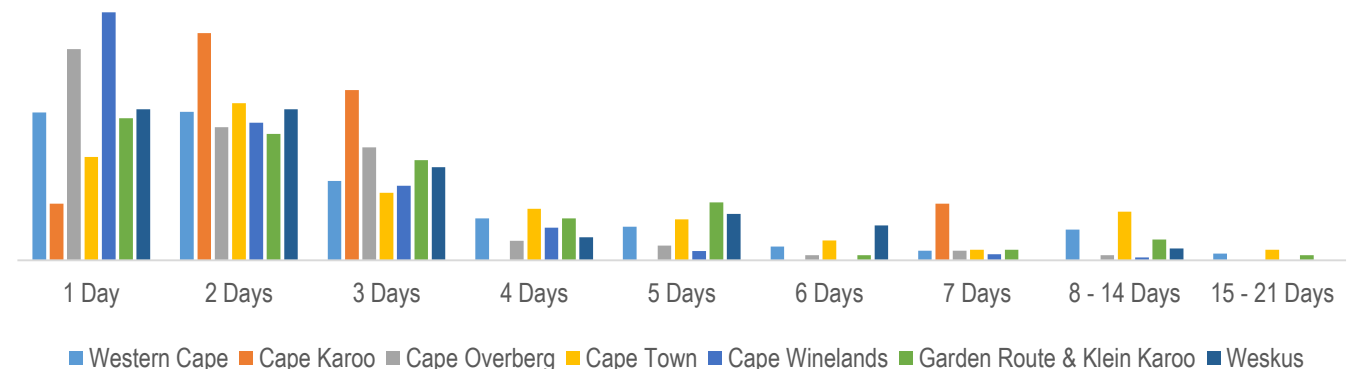


8.2. Mobile Insights: International Visitor Trends

- On average, international visitors spent the longest time in Cape Town (3,7 days) and the shortest time in the Cape Winelands (2,0 days).
- Over 70% of sampled tourists stayed overnight in Cape Town, which is slightly higher than the general average for the province (65,7%). Close to 90% of the sampled international tourists to the Cape Karoo stayed overnight, however, this sample is derived from a small base of only 9 tourists.
- An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.



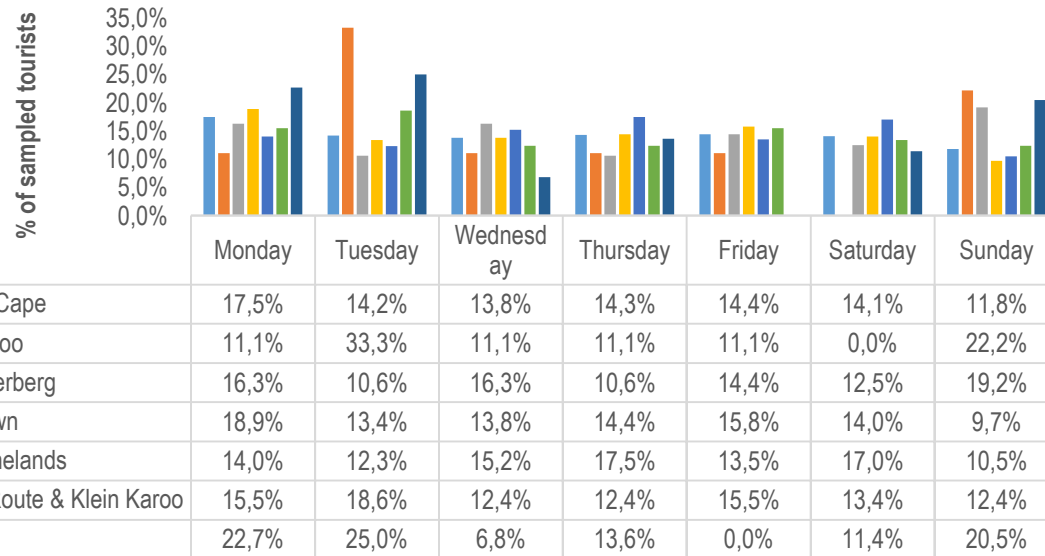
Average Length of Stay (Number of Days): International, Feb 2022



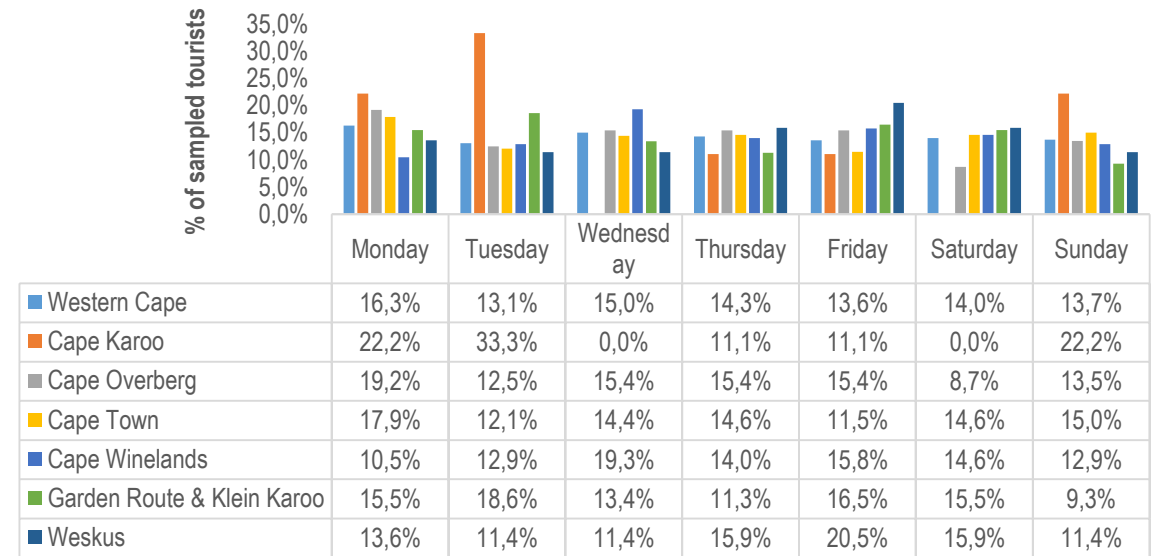
8.2. Mobile Insights: International Visitor Trends

- International visitors to the province are most likely to arrive on a Monday or Wednesday and depart on a Monday or Friday.
- In the Cape Winelands, Wednesday and Friday were popular arrival days and Thursday and Saturday was the preferred departure days.
- International visitors to the Garden Route & Klein Karoo arrived mostly on a Tuesday or Friday and departed on a Monday, Tuesday or Friday.

Popular Departure Days of the Week: International, Feb 2022



Popular Arrival Days of the Week: International, Feb 2022

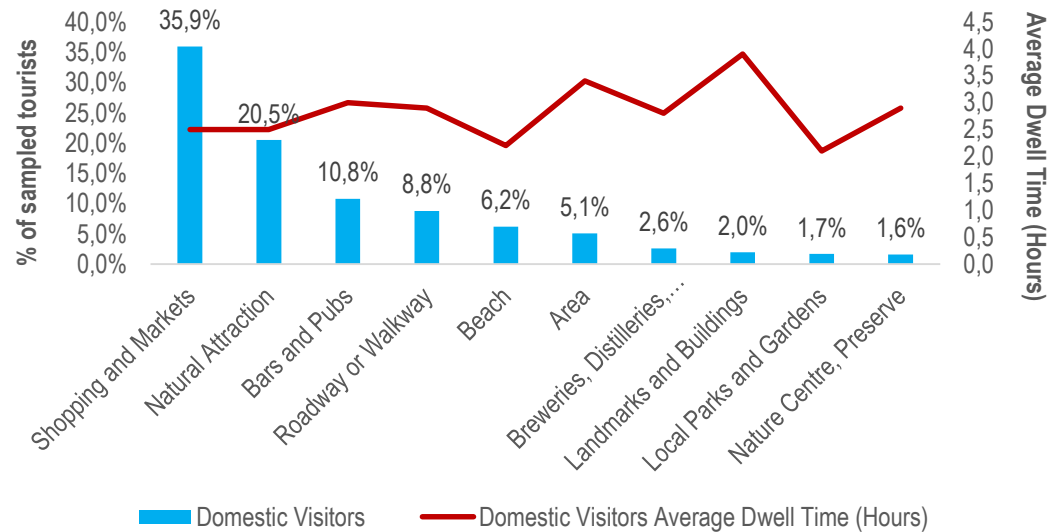


- In the Cape Karoo, Tuesday was the popular arrival and departure day.
- Cape Town arrival (17,9%) and departure (18,9%) days were most common on a Monday.
- Monday (19,2%) was the most popular arrival day in the Cape Overberg and a Sunday (19,2%) for departures.
- In the Weskus, Friday (20,5%) was the most popular arrival day and Monday, Tuesday and Sunday were common departure days.

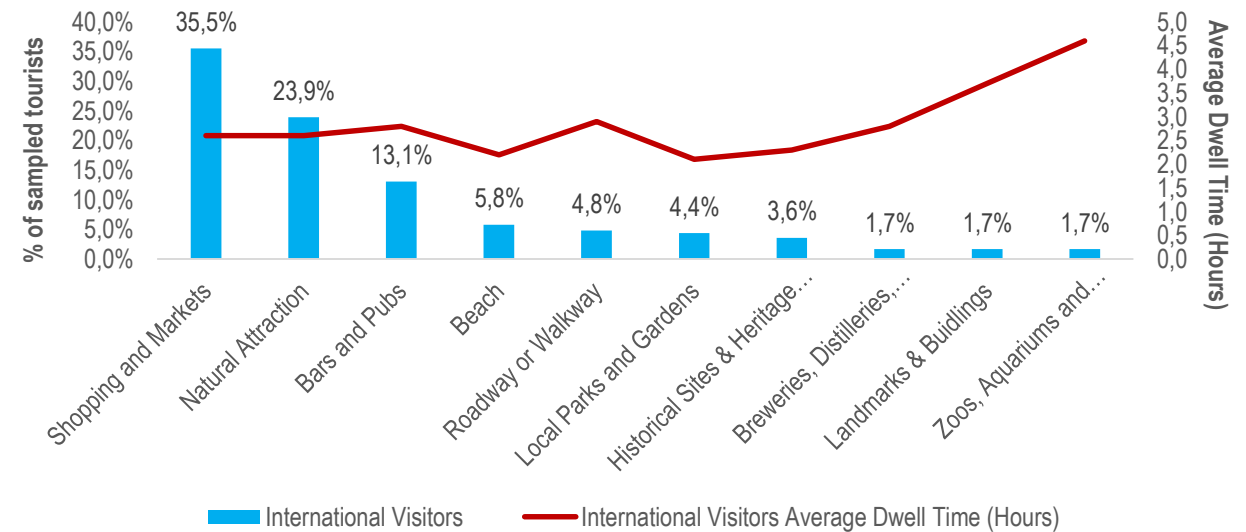
8.3. Points of Interest (POIs) Visited

- Shopping and markets was the most popular type of attraction visited by both domestic and international tourists. The V&A Waterfront Precinct in particular ranked as the top shopping centre amongst both domestic and international sampled tourists. Additional shopping locations included the Hermanus Market Square, Willowbridge & Tygervalley, Greenmarket Square and Tyger Falls.
- Natural attractions, particularly Table Mountain and Cape Point were popular with both domestic and international tourists. Domestic visitors spent a lot of time at the Knysna Waterfront as well.
- Bars & Pubs in the city centre were the third most popular point of interest for both the domestic and international tourists. On average both domestic and international tourists spent around 3 hours at their location.
- Roadways & walkways, which include Sea Point Promenade, Hermanus Market Square, Cederberg Wilderness Area, Hemel-en-Aarde Valley, Stanford Valley and Clarence Drive, ranked fourth among the top POIs visited by domestic tourists, and fifth among international tourists, with an average dwell time of 2,9 hours respectively.

Top POIs Visited by Domestic Tourists, Feb 2022



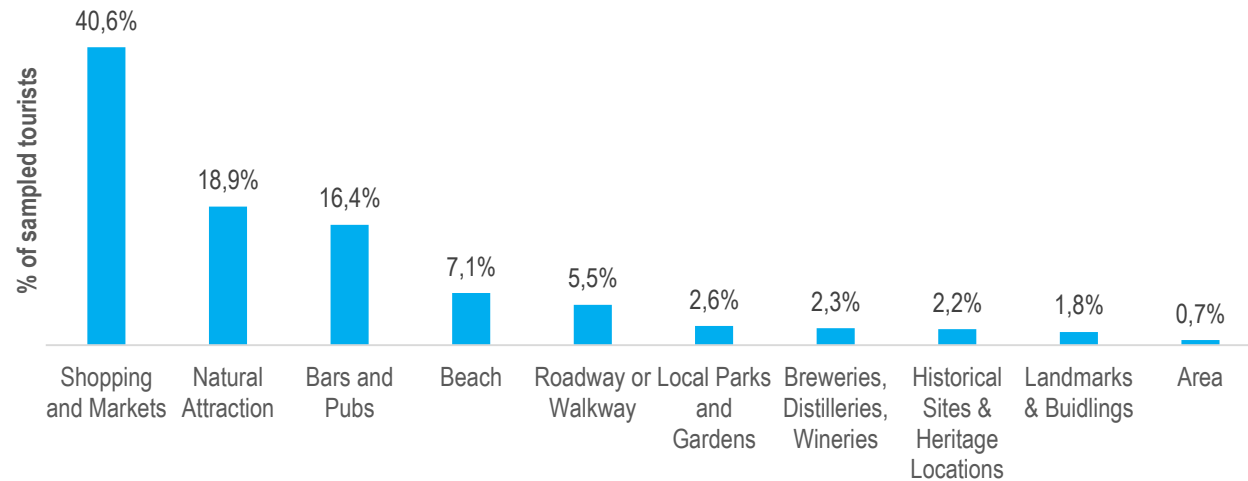
Top POIs Visited by International Tourists, Feb 2022



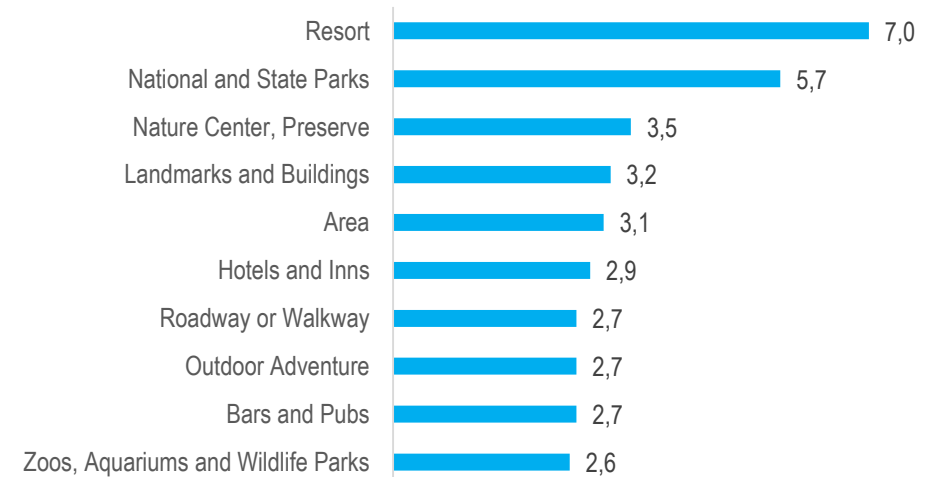
8.3. Points of Interest (POIs) Visited

- Similar to domestic tourist trends, shopping and markets (40,6%), natural attractions (18,9%) and bars and pubs (16,4%) ranked as the top three points of interests for local visitors. During February 2022, locals also enjoyed visiting the Western Cape’s prominent resorts. These resorts also allow day visits and are extremely popular amongst locals. On average, locals spent around 7 hours at resorts, which included ATKV Goudini Spa (7,0 hours) and the Old Mac Daddy Luxury Trailer Park (5,4 hours).

Top POIs Visited by Locals, Feb 2022



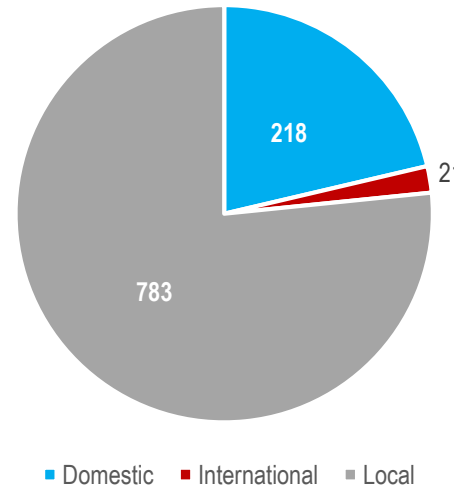
Locals Average Dwell Time at POIs (Hours), Feb 2022



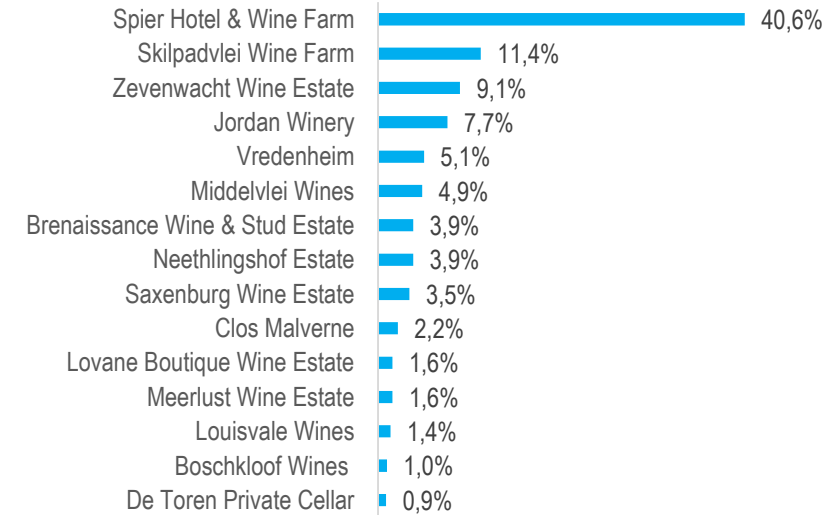
8.4. Stellenbosch Valley Wine Route

- From a sample size of 1 022 tourists who visited the Stellenbosch Wine Route in February 2022, close to 80% were locals, 21% were domestic and around 2% were international tourists.
- Spier was the most visited farm on the route, followed by Skilpadvlei and Zevenwacht. Lovane Boutique Wine Estate had the longest dwell time (4,1 hours), however this is based on data from only 16 tourists.

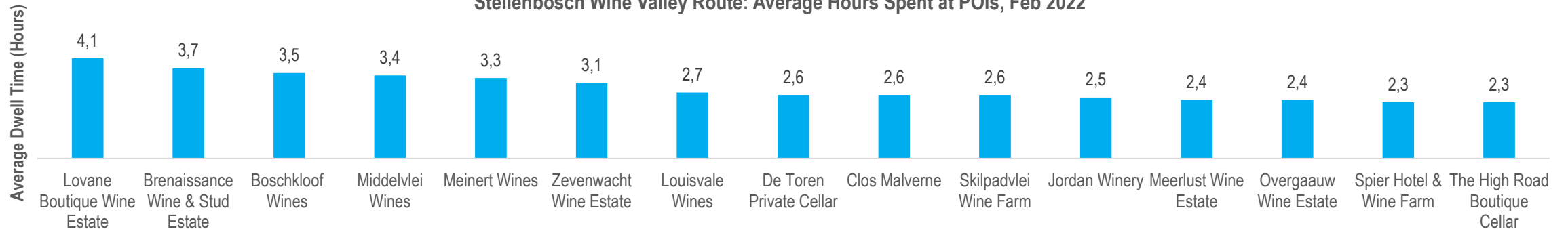
Sample Size: Visitors to Stellenbosch Wine Valley, Feb 2022



Stellenbosch Wine Valley Route: Top POIs Visited, Feb 2022



Stellenbosch Wine Valley Route: Average Hours Spent at POIs, Feb 2022



Mobile Tourists and Non-Tourists Definitions

- About Mobile Location Data

- Privacy compliant data is collected from location enabled apps on mobile devices. Data collected when those location enabled mobile devices entered our geo fenced area
- Data is collected through applications (news, weather, games, texting apps, traffic, etc)
 - Year over year numbers could be skewed by increase app penetration and data privacy settings/policies.
 - Exception with China which does not share data...
- Think of mobile data like survey data on steroids.
 - A sample size greater than 30 yields a 95% level of confidence.
 - This may be the largest sample size of data pertaining to visitors•
- Should not be compared to visitation data.•
- Many factors impact total sample size
 - Number of app partnerships
 - Usage of apps
 - App developer policies
 - Volume of visitors

- Who Are Tourists vs Non-Tourists?

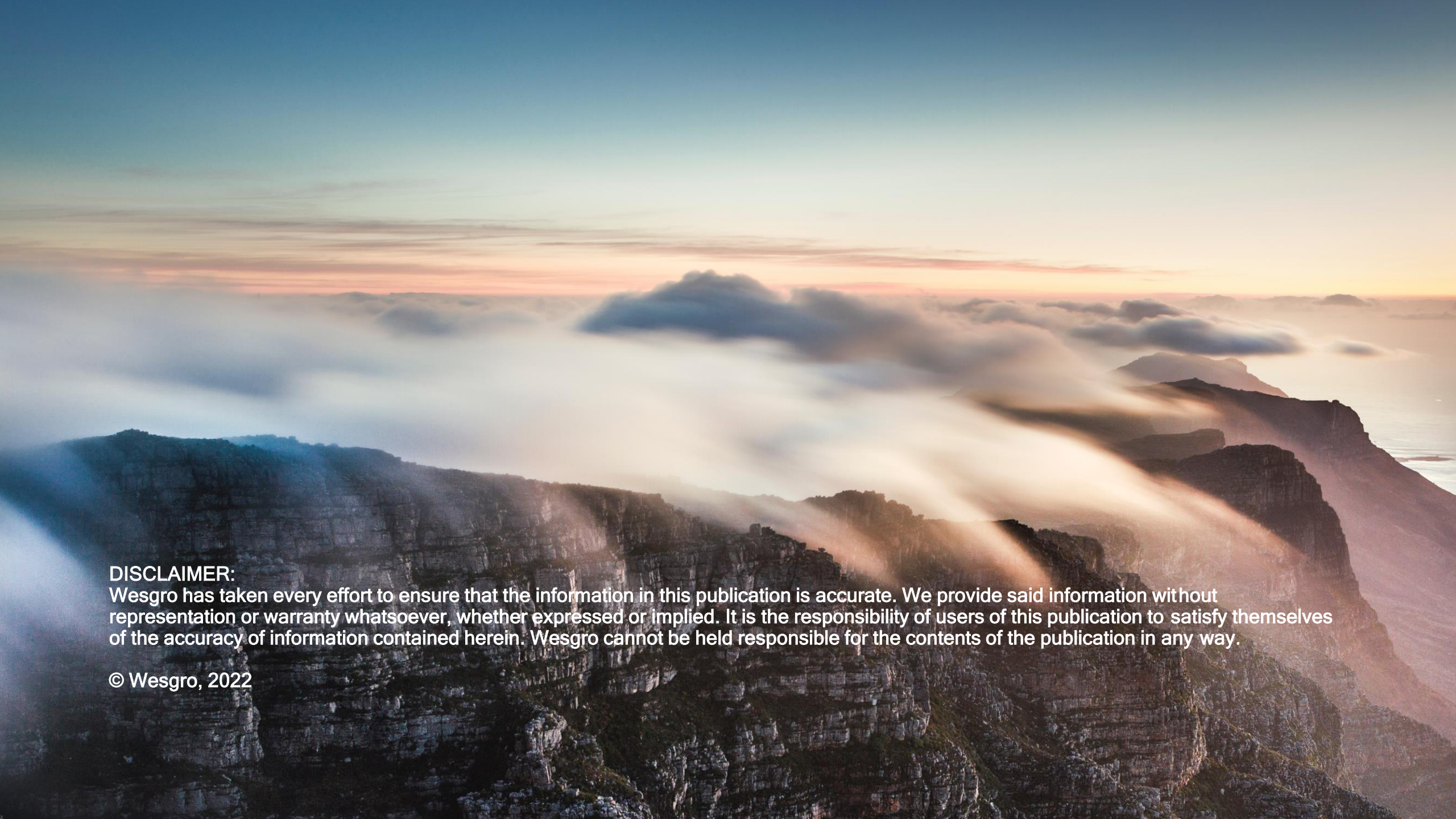
- A Tourist is typically defined as follows:
 - The visitor does not live or work within the study geography
 - The visitor travels a minimum distance to the study geography
 - The visitor appears in the study geography for a minimum period of time (exclude commuters/passers through etc.)

Mobile Tourists and Non-Tourists Definitions

Primary Study Geography		Tourists are defined as:
Province/Tourism Regions	When a visitor does not live or work in Cape Town, Cape Winelands, Cape Overberg, Weskus, Garden Route & Klein Karoo and Cape Karoo and they have traveled more than 25 miles (40km) and they have stayed in the polygon for more than 120 minutes, they are a tourist.	
Notes and Considerations: <ul style="list-style-type: none"> Residents of the Western Cape are not counted as a tourists Minimum distance traveled to meet the definition of tourist. Distance travelled is calculated from the visitors Common Evening Location (latitude and longitude) to the center of the polygon Minimum duration of visit of 120 minutes excludes commuters driving through each region 		
Secondary Study Geography		Tourists are defined as:
City or Town	When a visitor does not live or work in the City or Town and they have traveled more than 25 miles (40km), and they have stayed for more than 45 minutes, they are a tourist.	
Notes and Considerations: <ul style="list-style-type: none"> Residents of a city are not counted as a tourist of the city Minimum distance traveled of 40km satisfies tourist definition for minimum distance traveled. Distance travelled is calculate d f rom the visitors Common Evening Location (latitude and longitude) to the center of the polygon Minimum duration of visit of 45 minutes excludes commuters driving through each city 		
Point of Interest Study Geography		Tourists are defined as:
All Tourism Experiences	When a visitor stays in the polygon for more than 15 minutes and has not visited the polygon more than 20 times in any 90 day period, they are a tourist	
Notes and Considerations: <ul style="list-style-type: none"> Any 90 day period refers to any consecutive 90 days in their mobile location data history Filter out visitors not staying for any meaningful length of time (couriers, taxis etc.). Filter out people who work at the Tourism Experience. 		
What are Tourist Segments?		
<ul style="list-style-type: none"> Local Tourists: Tourists who reside within the same Region. Domestic Tourists: Tourists who reside in South Africa outside of Western Cape International Tourists: Tourists who reside outside of South Africa 		

Glossary of Key Terms

Term	Definition and Usage
Study Geography	A specific geography, defined by a boundary called a polygon.
Primary Study Geography	The largest area in the destination in which you want to capture mobile device data. For most destinations this is usually a country, province, or state.
Secondary Study Geography	Often destinations want to derive insights about sub-geographies within their destination, such as counties, tourism regions, and city regions.
Point of Interest	Points of interest are the smallest study geographies in your destination such as tourism businesses, parks, roadways, or city districts.
Sample	Not all people carry GPS enabled, opted in mobile devices with location services always activated. Thus, in any period of time, in any given study geography, mobile location data is a sample. Therefore, whenever this whitepaper discusses “visitors” or “tourists” or “residents” or any other grouping of devices, it should always be understood to be a sampling of real world visitor ship or foot traffic.
Visitors	Mobile devices seen within the study geography during a specific period of time
Common Evening Location (CEL)	Derived latitude-longitude point near which a device spends most of its time on evenings and/or weekends. While most often associated with a device’s home, there is nothing that inherently guarantees that it is a home (e.g. a person who works an overnight shift at a power plant).
Common Daytime Location (CDL)	Derived latitude-longitude point near which a device spends most of its traditional workweek [Monday Friday, 8am 6pm local time] time]. While most often associated with a device’s office or work location, there is nothing that inherently guarantees that it is an office or work location (e.g. a person who is a stay at home parent).
Residents/Workers/Locals	Terms referring to a visitor segment comprising of devices which are determined to have a CEL or a CDL with the study geography or within a certain (usually short) distance of the study geography. For most tourism analyses, these devices are eliminated from the project because they are not, by definition, tourists. However, it is possible to include these devices within a broader visitor study.
Tourists	Term generally referring to a visitor segment comprising of devices which are determined to have NOT have a CEL or a CDL with the study geography or within a certain (usually short) distance of the study geography but have come to the study geography from a different origin market.
Tourist Segments	Groupings of tourist segments which have a defining characteristic associated with their appearance in a study geography, such as “Short Haul Tourists” or “International Tourists” or “In State Tourists.”
Overnighters	Term which characterizes a specific visitor segment where mobile devices are seen in the study geography for more than one consecutive day. An overnight stay is defined as tourists that arrived prior to midnight (0:00) and stayed until 07:00 the following day.
Day Trippers	Term which characterizes a specific visitor segment where mobile devices are seen in the study geography for less than one day.
Length of Stay	Duration of trip within the study geography. The methodology for calculating length of stay is based on the characteristics of the geography.



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