Tourism Research Overview July 2022

Cape Town & the Western Cape

Key Findings

- Tourism in the Western Cape continues on a positive trajectory to exceed pre-pandemic levels. July 2022 performance indicated that passengers through CTIA's international terminal reached a recovery rate of 87% when compared to the same month in 2019, the highest recovery rate over the last five months.

- Domestic recovery slowed to 68% in July after remaining on 70-80% recovery since the start of the year but passengers through George Airport recovered to 99% when compared to the same month in 2019.

- Year to date (as at May 2022), UK ranked as the top source market to Cape Town (via Air), followed by Germany, USA, Netherlands and France. Europe has regained its position as the Western Cape's top region for tourist arrivals, with 6 out of the top 10 source markets to Cape Town originating from the region.

- Eight out of the top 10 source markets to Cape Town (via Air) already recovered to more than half of the number of tourist arrivals recorded over the same period in 2019. Among the top ten list, Zimbabwe was the only country that exceeded pre-pandemic levels (164% recovery rate).

- Hotel occupancy for the Western Cape stood at 44,3% in July 2022, representing a recovery rate of 84% when compared to 2019. The Average Daily Rate (ADR) for the Western Cape grew to R1, 432.76 and RevPAR (Revenue Per Average Room) reached R634.13. ADR exceeded June 2019 levels, recovering to 111% and RevPAR reached 93% recovery.

- Footfall at 25 participating attractions recorded a total of 338,695 visitors in July 2022, a 124% year-on-year growth in the number of visitors and a recovery rate of 83% when compared to July 2019.

- The top 5 highest year-on-year growth rates in July 2022 were recorded for Robben Island (4914%), Cango Caves (3866%), Table Mountain National Park: Boulders (285%), Viljoensdrift River Cruise (259%) and Table Mountain Aerial Cableway (227%).

- 14 out of the 25 attractions exceeded their July 2019 visitor numbers. Remarkable recovery rates of over 200% was achieved at the Table Mountain Aerial Cableway (259%), Kogelberg Nature Reserve (238%) and Knysna National Park (200%) when compared to 2019.

- Based on mobile location data insights of 39,906 domestic and 1,001 international tourists, the Cape Winelands was the most popular region among domestic visitors while international visitors mainly spent time in Cape Town. On average, domestic visitors spent the longest time in the Garden Route & Klein Karoo (2,6 days), while international visitors spent on average 2,8 days in Garden Route & Klein Karoo and Cape Town respectively. Garden Route & Klein Karoo ranked as the most popular region for overnight stays among the domestic tourists and international visitors mostly stayed overnight in the Weskus and Cape Town.

- Shopping and markets was the most popular type of attraction visited by domestic, international and local tourists. Prominent shopping points included the V&A Waterfront, Willowbridge and Tygervalley. Domestic visitors spent on average 2,4 hours shopping while international visitors shopped for 2,8 hours.

- Natural attractions; particularly Cape Point, Table Mountain and Knysna Waterfront were popular with both domestic and international tourists.

- From a sample size of 457 tourists who visited the Stellenbosch Wine Route, 76% were locals, 22% domestic and 2% international tourists. Spier was the most visited farm on the route, followed by Skilpadvlei and Saxenburg Wine Estates.

CPT DOMESTIC terminal passenger performance

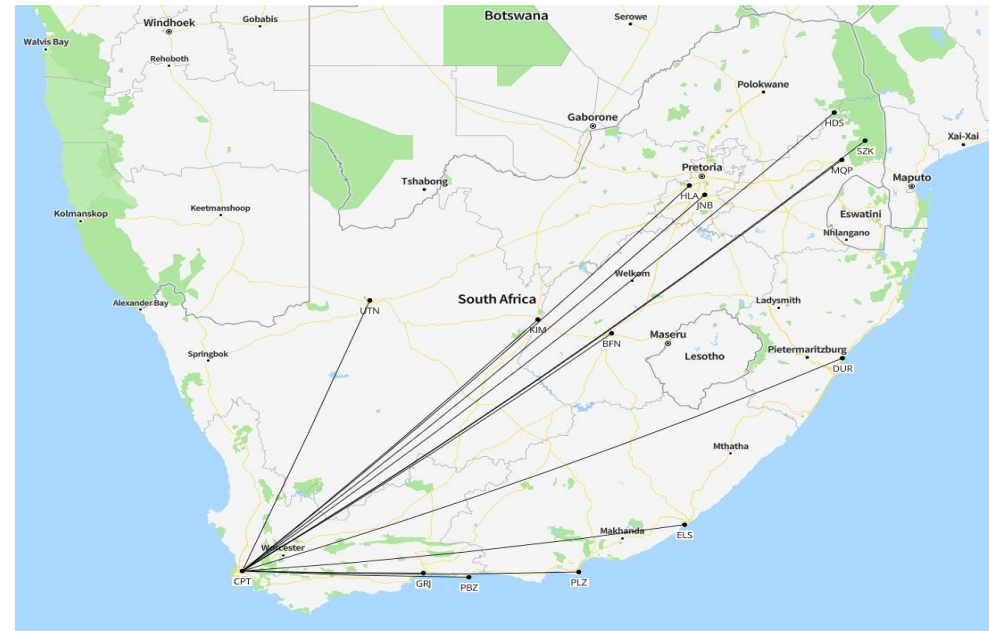| Year/Month	2019	2020	2021	2022						
				Mar	Apr	May	Jun	Jul	Jan-Jul	
Two-way passengers	8 363 307	3 167 542	4 221 365	556 644	539 049	504 172	407 626	456 785	Two-way Passengers	3 406 833
Passenger recovery*	100%	38%	50%	72%	75%	83%	62%	68%	% Growth vs 2021	60%
Average load factor	78%	64%	67%	Arr 82%	Arr 81%	Arr 75%	Arr 84%	Arr 92%		
				Dep 84%	Dep 82%	Dep 73%	Dep 91%	Dep 85%		

Passenger data source: ACSA

* Passenger recovery compared to same period in 2019

Operating carriers

Source: OAG Schedules Analyser

CPT International terminal passenger performance

Year/Month	2019	2020	2021	2022					Jan-Jul	
				Mar	Apr	May	Jun	Jul		
Two-way passengers	2 606 398	810 811	525 441	161 064	156 933	119 729	124 783	150 938	Two-way Passengers	936 471
Passenger recovery*	100%	31%	20%	61%	76%	74%	73%	87%	% Growth vs 2021	373%
Average load factor	82%	63%	46%	Arr 71%	Arr 77%	Arr 60%	Arr 63%	Arr 86%		
				Dep 82%	Dep 83%	Dep 75%	Dep 81%	Dep 71%		

Passenger data source: ACSA

* Passenger recovery compared to same period in 2019

Operating carriers

BRITISH AIRWAYS

Kenya Airways
The Pride of Africa

SINGAPORE AIRLINES

AIR BOTSWANA

Ethiopian

edelweiss

Lufthansa

RwandAir

KLM

Fly Namibia

UNITED

TAAG

QATAR AIRWAYS

AIRLINK

TURKISH AIRLINES

Emirates

Source: OAG Schedules Analyser

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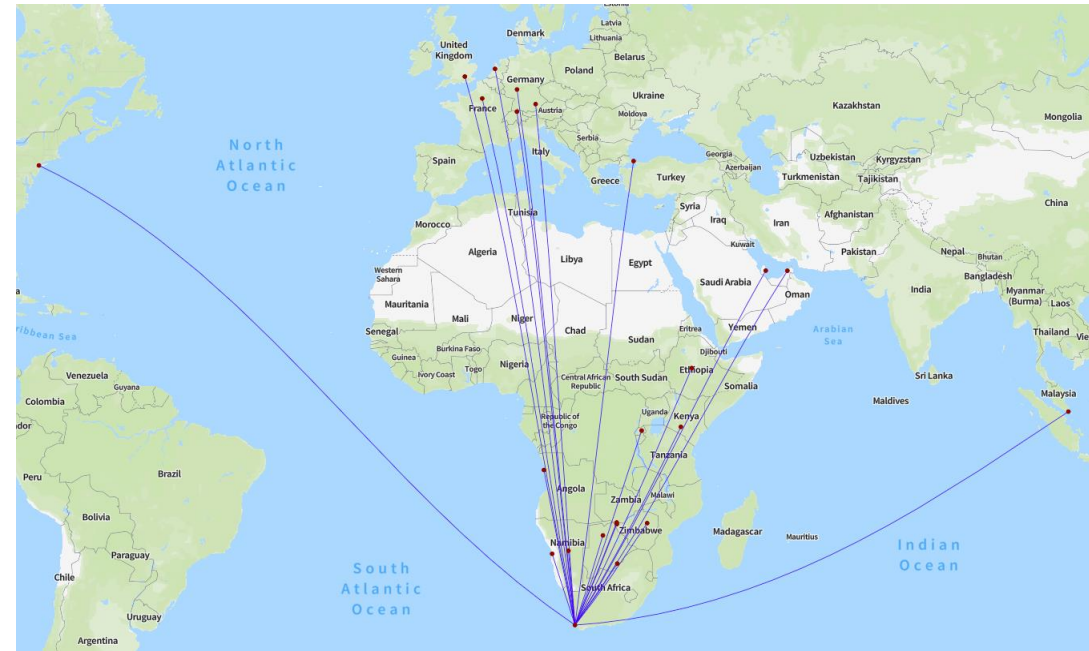
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George Airport (GRJ) passenger performance

Year/Month	2019	2020	2021	2022						Jan-Jul	
				Mar	Apr	May	Jun	Jul			
Two-way passengers	832 981	340 438	536 886	70 528	72 678	61 290	56 116	60 284		Two-way Passengers	433 121
Passenger recovery*	100%	41%	64%	97%	109%	97%	86%	99%		% Growth vs 2021	63%

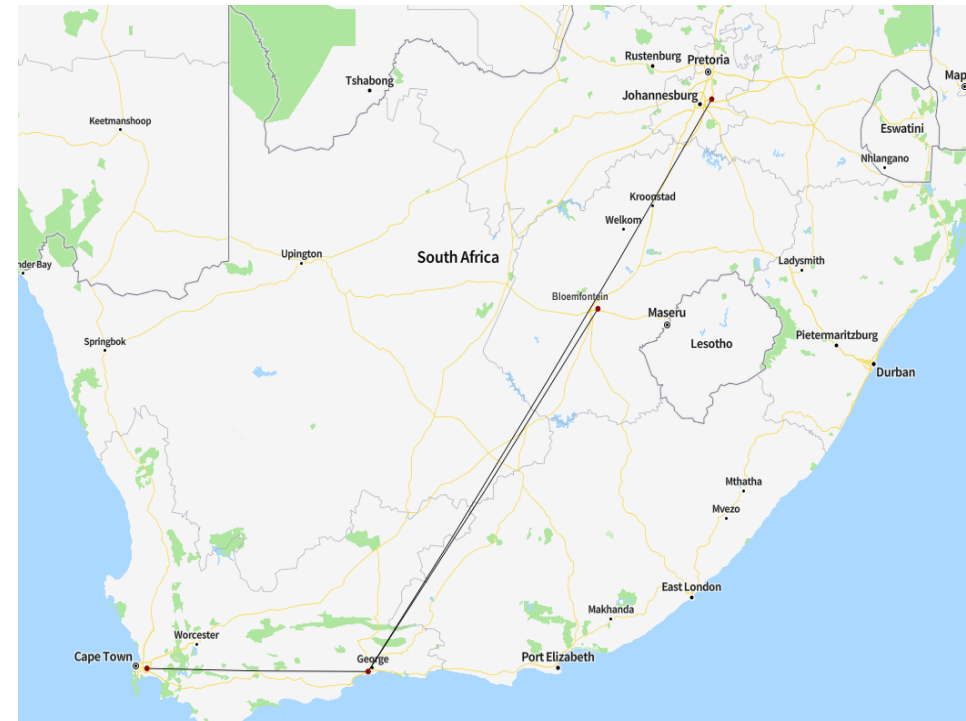Passenger data source: ACSA

* Passenger recovery compared to same period in 2019

Operating carriers

Source: OAG Schedules Analyser

4. Hotel Occupancy in the Western Cape

- **Occupancy** in the Western Cape, at **44,3%** in July 2022, **increased by 162%** when compared to the 16,9% in the same month in 2021, reaching a **recovery rate of 84%** when compared to the 52,8% occupancy in July 2019.

- **The Average Daily Rate (ADR)** for the Western Cape grew to **R1, 432.76** in July 2022 with a **recovery rate of 111%** on its 2019 figure.

- At **R634.13** in July 2022, **RevPAR (Revenue Per Average Room) grew by 259%** against its 2021 figure and **recovered to 93%** of what it was in July 2019.

Western Cape Occupancy, July 2019-2022

52,8%
44,3%
11,0%
16,9%

2019   2020   2021   2022
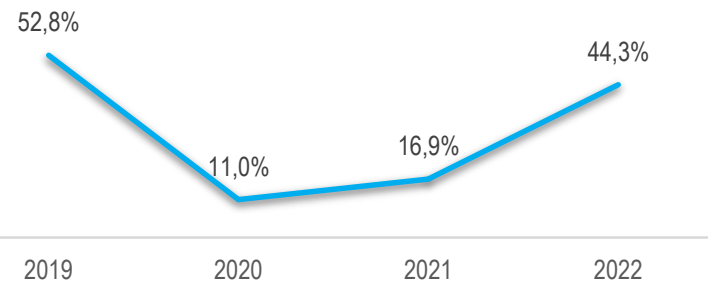
Source: STR, 2022

Western Cape ADR, July 2019-2022

R1 292,60
R1 432,76
R1 042,73
R 709,86

2019   2020   2021   2022
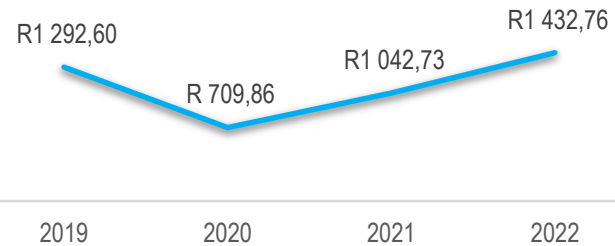
Source: STR, 2022

Western Cape RevPAR, July 2019-2022

R 682,80
R 634,13
R 176,62
R 78,36

2019   2020   2021   2022

Source: STR, 2022

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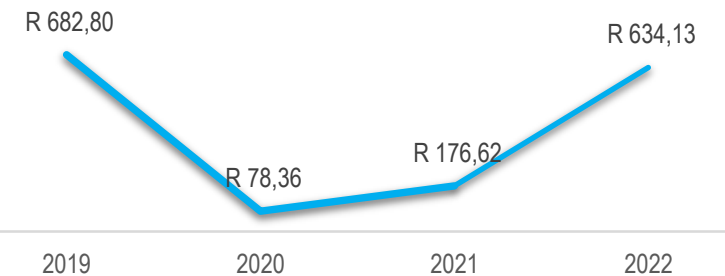
5. Western Cape Attractions

- Visitors to the 25 participating attractions across the province recorded a total of **338,695 visitors** in July 2022, a **124% growth in the number of visitors** when compared to the same month last year and **83% of what it was in July 2019**.

- **The top 5 highest year-on-year growth** rates in July 2022 were recorded for Robben Island (4914%), Cango Caves (3866%), Table Mountain National Park: Boulders (285%), Viljoensdrift River Cruise (259%) and Table Mountain Aerial Cableway (227%).

- **14 out of the 25** attractions **exceeded** their July 2019 visitor numbers. Remarkable recovery rates of **over 200%** was achieved at the Table Mountain Aerial Cableway (259%), Kogelberg Nature Reserve (238%) and Knysna National Park (200%).

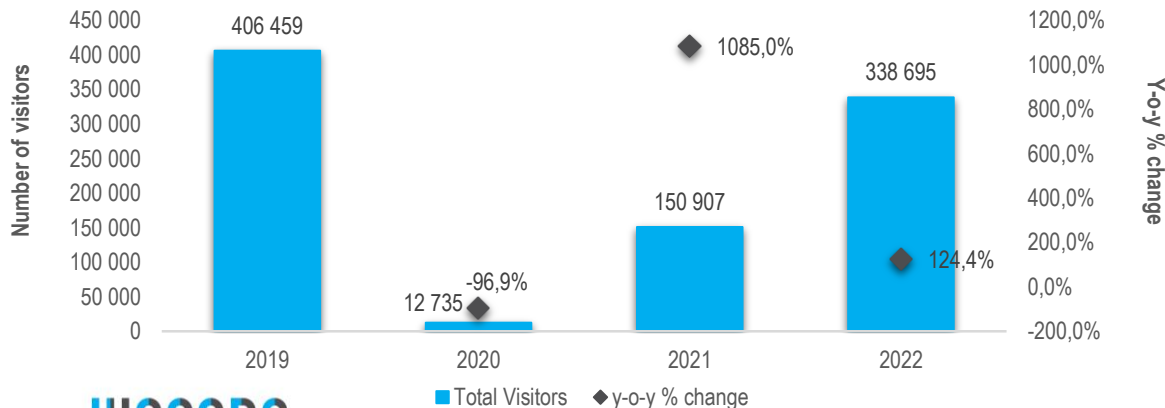**VISITORS TO PARTICIPATING WESTERN CAPE ATTRACTIONS, JUL 2019-2022**

Attractions	Jul 2021/2022 % Change	Jul 2019/2022 Recovery %
Cape Town		
Kirstenbosch National Botanical Garden	26%	74%
Table Mountain Aerial Cableway	227%	259%
Table Mountain National Park	157%	84%
Table Mountain National Park: Boulders	285%	64%
Table Mountain National Park: Cape of Good Hope	158%	61%
Robben Island	4914%	132%
Cape Overberg		
Agulhas National Park	12%	82%
Bontebok National Park	17%	103%
Cape Agulhas Lighthouse	15%	85%
De Hoop Nature Reserve	13%	156%
De Mond Nature Reserve	3%	140%
Kogelberg Nature Reserve	-18%	238%
Stony Point	-10%	71%
Shipwreck Museum	*No visitors during July 2021*	114%
Garden Route & Klein Karoo		
Cango Caves	3866%	76%
Tsitsikamma National Park	104%	88%
Wilderness National Park	8%	141%
Knysna National Park	44%	200%
Weskus		
West Coast National Park	-25%	45%
!Khwattu	93%	113%
Old Jail	-0,3%	73%
Cape Karoo		
Karoo National Park	7%	132%
Cape Winelands		
Protea Tractor Trip	84%	120%
Birds Paradise	45%	134%
Viljoensdrift River Cruises	259%	108%

Sources: SANParks, LTO's, and Attractions, 2022

6. Top International Source Markets to Cape Town

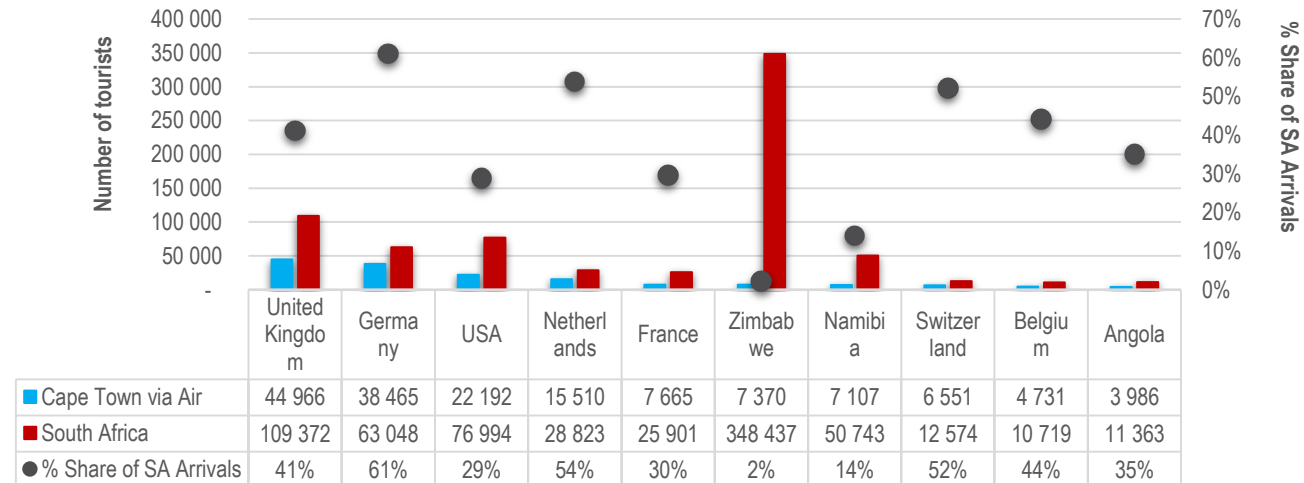- Year-to-date (as at May 2022), the top source market to Cape Town via Air was the **UK**, followed by **Germany**, **USA**, **Netherlands** and **France**.

- **Tourist arrivals from the UK grew** from 1 844 during the first 5 months last year to 44 966 over the same period in 2022 and recovered to 61% of what it was in 2019.

- **Germany** with 38 465 tourist arrivals, **recovered to 62%** and **Netherlands** (15 510 tourist arrivals) **had a recovery rate of 58%** when compared to Jan - May 2019.

- **USA** (22 192 tourist arrivals) **recovered to more than half** of its Jan - May 2019 figure, and **France** (7 665 tourist arrivals) **recovered to 34%.**

- **Zimbabwe** (7 370 tourist arrivals) **led as the top source market from the African continent to Cape Town, followed by Namibia** with 7 107 tourist arrivals. Among the top ten list, **Zimbabwe** was the only country that **exceeded pre-pandemic levels** (164% recovery rate).

- **61% of German tourists who travelled to South Africa in the first five months of 2022 visited Cape Town**, followed by **54% of Dutch tourists** to South Africa.

Recovery in Top 10 Source Markets to Cape Town (via Air) and South Africa, Jan-May 2019/2022

Top 10 Source Markets to Cape Town (via Air) and South Africa: Jan-May 2022

	United Kingdom	Germany	USA	Netherlands	France	Zimbabwe	Namibia	Switzerland	Belgium	Angola
Cape Town via Air	44 966	38 465	22 192	15 510	7 665	7 370	7 107	6 551	4 731	3 986
South Africa	109 372	63 048	76 994	28 823	25 901	348 437	50 743	12 574	10 719	11 363
% Share of SA Arrivals	41%	61%	29%	54%	30%	2%	14%	52%	44%	35%

Source: StatsSA, 2022

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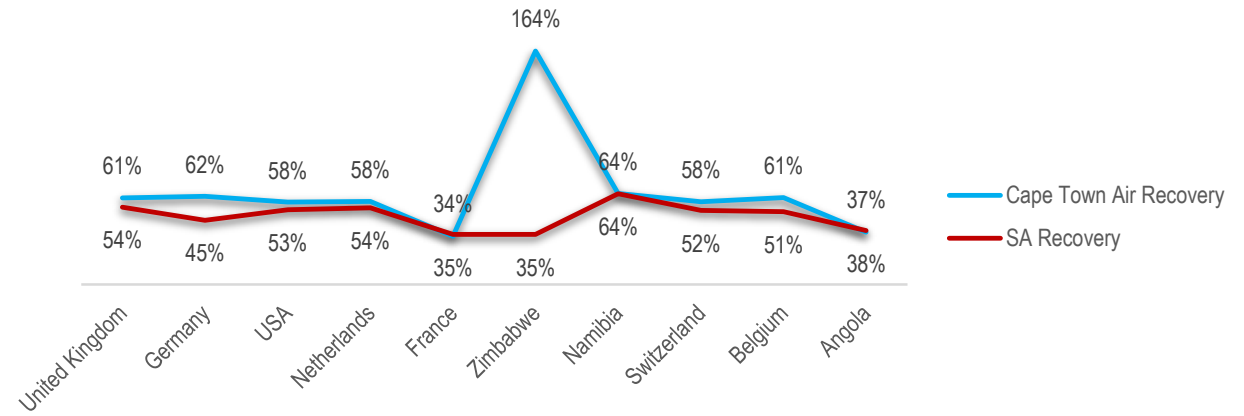
Visitor Trends
Mobile Location Data Insights

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8. Western Cape Mobile Location Data Insights

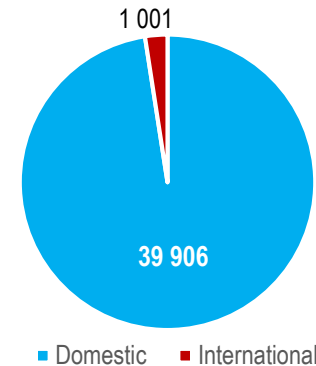- **What is mobile location data?**
  - Geo or spatial data from smartphones. When a user installs an app, they are often asked to share their location data with the company which provides the app, and other companies who are partners with the app publisher.
  - Users can opt in to location sharing (or 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.
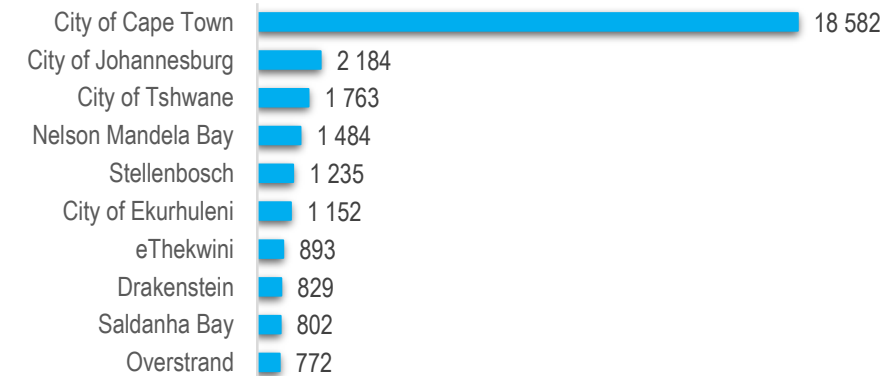
- **Why use mobile location data insights?**
  - Mobile location-based data offers a more granular lens on visitor behaviour and provides a much larger sample size.
  - These insights aim to facilitate a better understanding of visitor movement throughout the Western Cape's six region.
  - Mobile location 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 **39 906 domestic** and **1 001 international** tourists who visited the Western Cape in July 2022. Within the domestic data set, **18 582** of the sampled tourists were from the City of Cape Town and from the international sampled tourists, **445** were from the USA.

Total Sample Size, July 2022

1 001

39 906

■ Domestic ■ International

Domestic Origin Municipality, July 2022

City of Cape Town	18 582
City of Johannesburg	2 184
City of Tshwane	1 763
Nelson Mandela Bay	1 484
Stellenbosch	1 235
City of Ekurhuleni	1 152
eThekwini	893
Drakenstein	829
Saldanha Bay	802
Overstrand	772

International Origin Country, July 2022

United States	Australia	Netherlands	Canada	Germany	Brazil	France	New Zealand	Mexico	Spain
445	130	89	57	44	37	27	25	21	18

Source: Rove, 2022

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8.1. Mobile Insights: Domestic Visitor Trends

- In July 2022, the Cape Winelands (45%) and Cape Town (23%) saw the most domestic visitors in terms of volume of sample size and Cape Karoo (4%) had the least.

- The Cape Winelands (45,1%) was the most popular region for repeat visits, followed by Cape Town (43,2%) and the Cape Garden Route & Klein Karoo (35,6%).

Domestic Sample Size, July 2022

Western Cape	39 906
Cape Winelands	17 767
Cape Town	9 221
Cape Overberg	5 024
Garden Route & Klein Karoo	4 364
Weskus	2 021
Cape Karoo	1 509
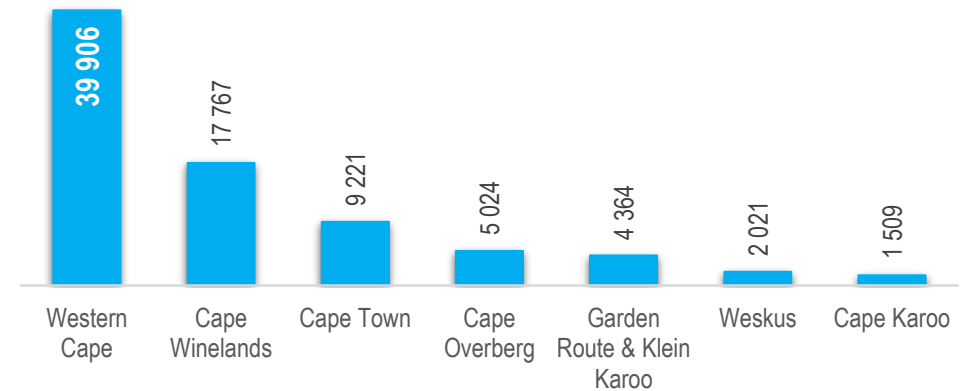
Domestic Repeat Visitors, July 2022

Western Cape	45,5%
Cape Karoo	28,4%
Cape Overberg	25,2%
Cape Town	43,2%
Cape Winelands	45,1%
Garden Route & Klein Karoo	35,6%
Weskus	33,7%
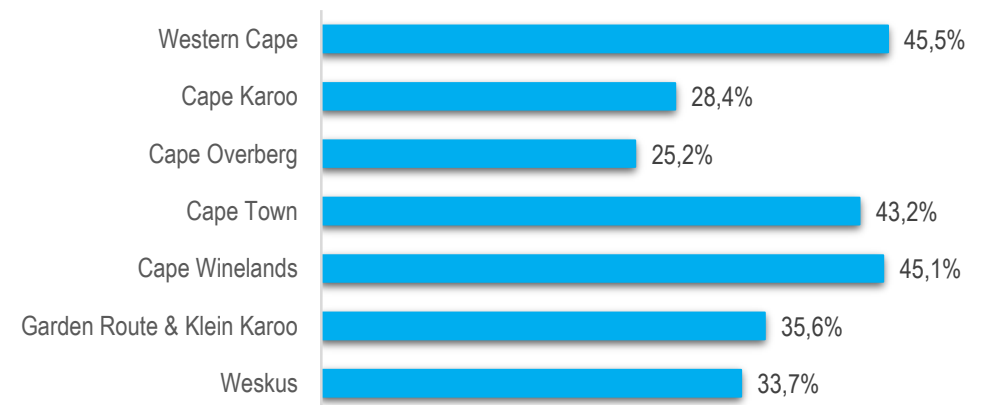
Source: Rove, 2022

8.1. Mobile Insights: Domestic Visitor Trends

- On average, domestic visitors spent the longest time in the Cape Garden Route & Klein Karoo during July 2022 (2,6 days) and the shortest time in the Cape Karoo (1,5 days).

- Over 60% of the sampled tourists stayed overnight in the Cape Garden Route & Klein Karoo and Cape Town respectively. More than half of the tourists to Weskus stayed overnight and 64,3% of tourists to the Cape Karoo spent 1 day in the region.

- An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.

Average Length of Stay (LOS) July 2022

Domestic Overnight Stays, July 2022

Region	%
Western Cape	51,3%
Cape Karoo	28,2%
Cape Overberg	48,2%
Cape Town	60,9%
Cape Winelands	46,0%
Garden Route & Klein Karoo	63,2%
Weskus	52,5%

Average Length of Stay (Number of Days): Domestic, July 2022

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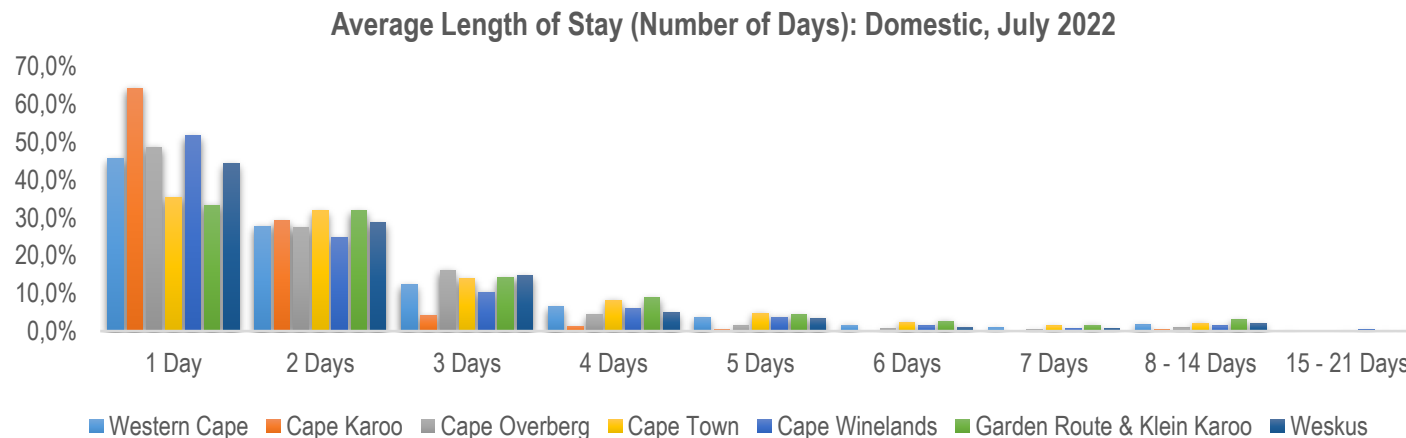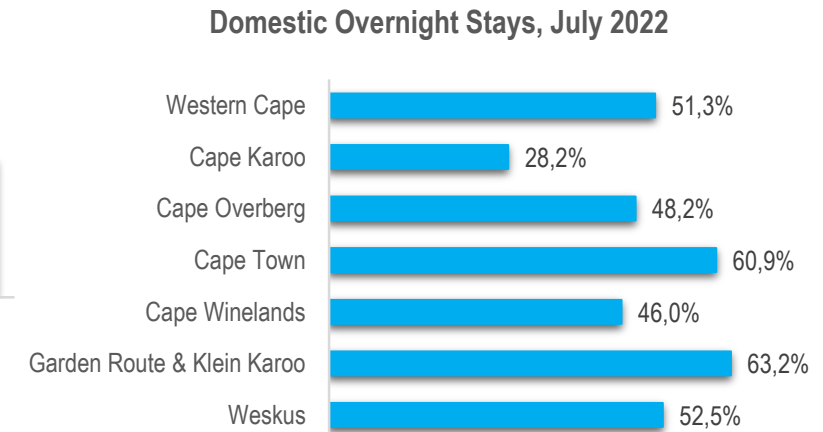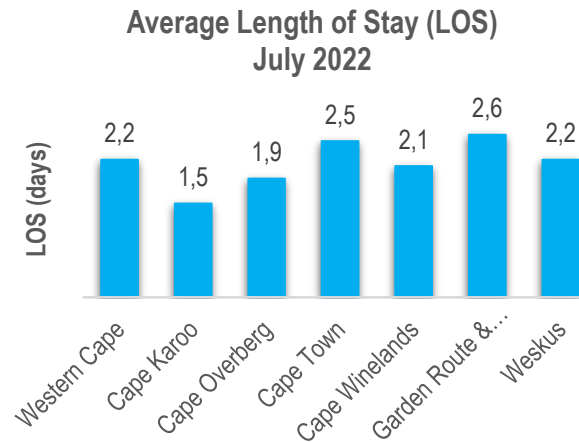
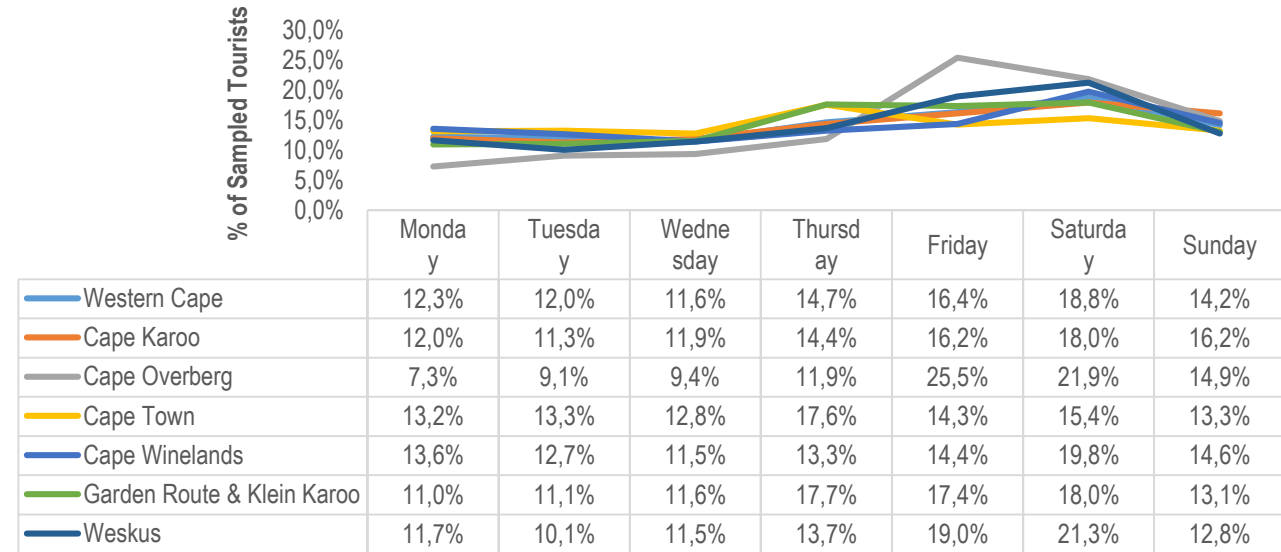# 8.1. Mobile Insights: Domestic Visitor Trends

- Domestic visitors to the province were most likely to arrive on a Saturday or Friday and depart on a Sunday, which points to the popularity in weekend stays.

- In the Cape Winelands, Saturday was the most popular arrival day and Sunday the most common day for departure in July 2022.

- Tourists to the Garden Route & Klein Karoo generally arrived on a Saturday and departed on a Sunday.

Popular Departure Days of the Week: Domestic, July 2022

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Western Cape	9,1%	9,7%	10,3%	15,6%	15,8%	15,9%	23,6%
Cape Karoo	9,7%	11,6%	10,9%	14,8%	15,8%	17,9%	19,4%
Cape Overberg	7,4%	7,8%	8,6%	12,2%	12,2%	15,4%	36,4%
Cape Town	11,4%	11,2%	11,7%	16,8%	16,2%	13,3%	19,4%
Cape Winelands	8,0%	9,7%	10,2%	16,1%	16,7%	17,7%	21,5%
Garden Route & Klein Karoo	10,5%	8,9%	9,6%	15,3%	16,1%	14,3%	25,5%
Weskus	8,5%	8,6%	9,7%	14,9%	14,2%	15,8%	28,3%
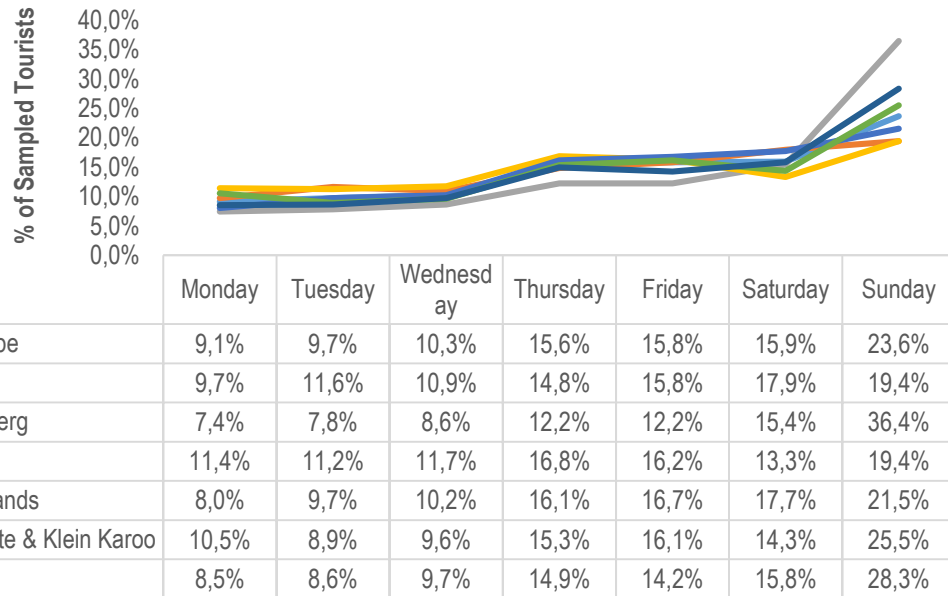
Source: Rove, 2022

Popular Arrival Days of the Week: Domestic, July 2022

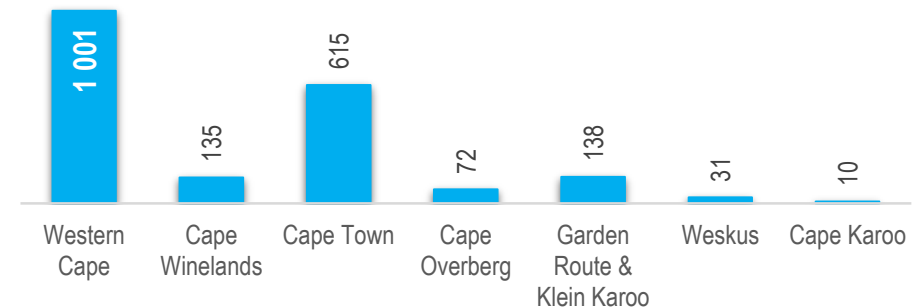|	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Western Cape	12,3%	12,0%	11,6%	14,7%	16,4%	18,8%	14,2%
Cape Karoo	12,0%	11,3%	11,9%	14,4%	16,2%	18,0%	16,2%
Cape Overberg	7,3%	9,1%	9,4%	11,9%	25,5%	21,9%	14,9%
Cape Town	13,2%	13,3%	12,8%	17,6%	14,3%	15,4%	13,3%
Cape Winelands	13,6%	12,7%	11,5%	13,3%	14,4%	19,8%	14,6%
Garden Route & Klein Karoo	11,0%	11,1%	11,6%	17,7%	17,4%	18,0%	13,1%
Weskus	11,7%	10,1%	11,5%	13,7%	19,0%	21,3%	12,8%

Source: Rove, 2022

- In the Cape Karoo, which predominantly saw domestic tourists between one and two days, Saturday was the most popular day for arrival and Sundays for departure.

- Cape Town arrival days were most common on Thursday and departure was most popular on a Sunday.

- Friday was the most popular arrival day in the Cape Overberg and Sunday was its most common departure day.

- In the Weskus, Saturday was the most popular arrival day and Sunday the most popular day for departure.

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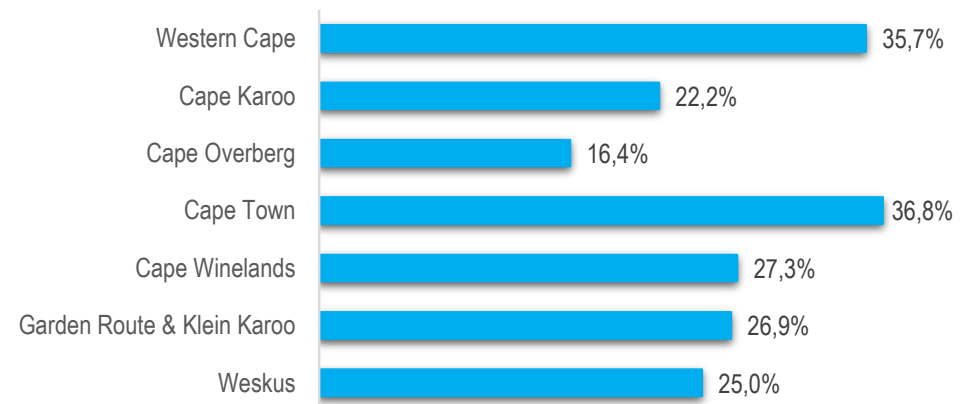tourism, trade, investment, film

8.2. Mobile Insights: International Visitor Trends

- Over 60% of the sampled international tourists visited Cape Town followed by 14% who visited the Cape Garden Route & Klein Karoo and the Cape Winelands respectively.

- Visitor trends for the Cape Karoo is based on a sample size of only 10 international tourists and therefore does not provide an accurate statistical representation for the region.

- Cape Town, Winelands and the Garden Route & Klein Karoo saw the most international repeat visitors in July 2022.

International Sample Size, July 2022

Region	Value
Western Cape	1 001
Cape Winelands	135
Cape Town	615
Cape Overberg	72
Garden Route & Klein Karoo	138
Weskus	31
Cape Karoo	10

International Repeat Visits, July 2022

Region	Value
Western Cape	35,7%
Cape Karoo	22,2%
Cape Overberg	16,4%
Cape Town	36,8%
Cape Winelands	27,3%
Garden Route & Klein Karoo	26,9%
Weskus	25,0%

Source: Rove, 2022

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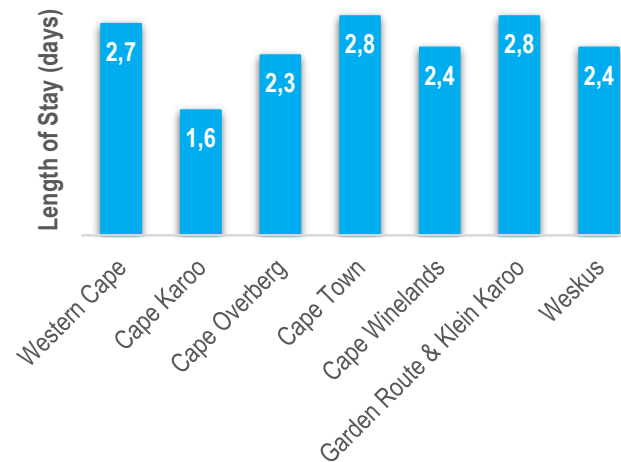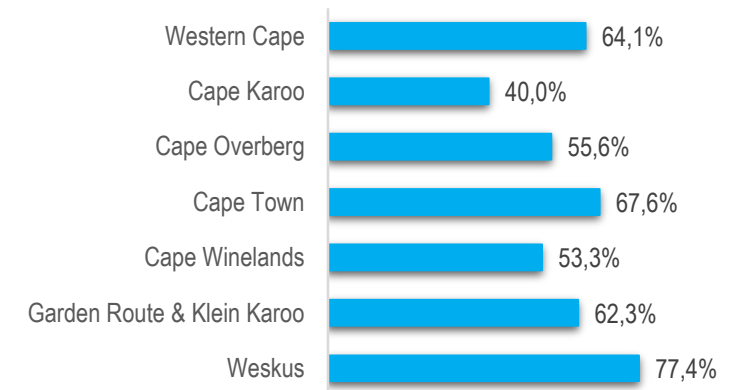
8.2. Mobile Insights: International Visitor Trends

- International visitors spent the longest time in the Garden Route & Klein Karoo and Cape Town, recording an average of 2,8 days for each region.

- Based on a sample of 31 international tourists, 77% stayed overnight in the Weskus. Close to 70% of tourists stayed overnight in Cape Town and over 60% in the Garden Route & Klein Karoo.

- An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.
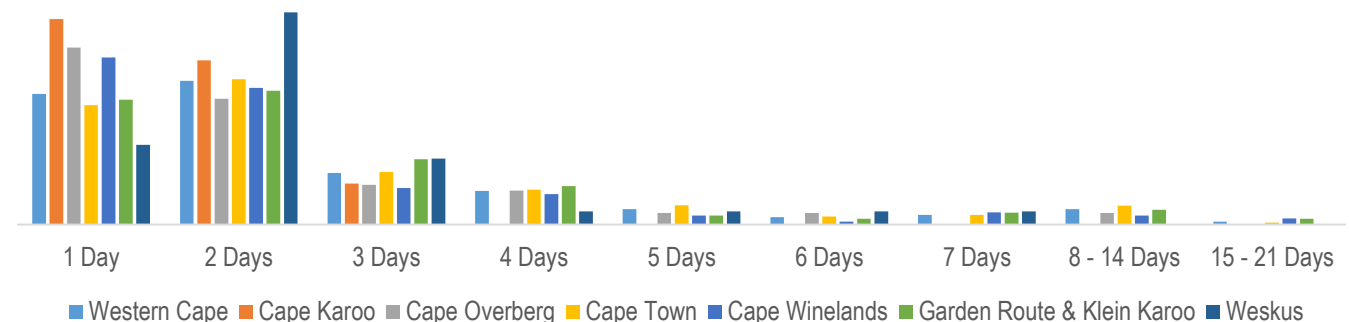
Average Length of Stay (LOS), July 2022

Region	LOS (days)
Western Cape	2,7
Cape Karoo	1,6
Cape Overberg	2,3
Cape Town	2,8
Cape Winelands	2,4
Garden Route & Klein Karoo	2,8
Weskus	2,4

International Sample of Overnight Stays, July 2022

Region	%
Western Cape	64,1%
Cape Karoo	40,0%
Cape Overberg	55,6%
Cape Town	67,6%
Cape Winelands	53,3%
Garden Route & Klein Karoo	62,3%
Weskus	77,4%

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

Legend: Western Cape, Cape Karoo, Cape Overberg, Cape Town, Cape Winelands, Garden Route & Klein Karoo, Weskus

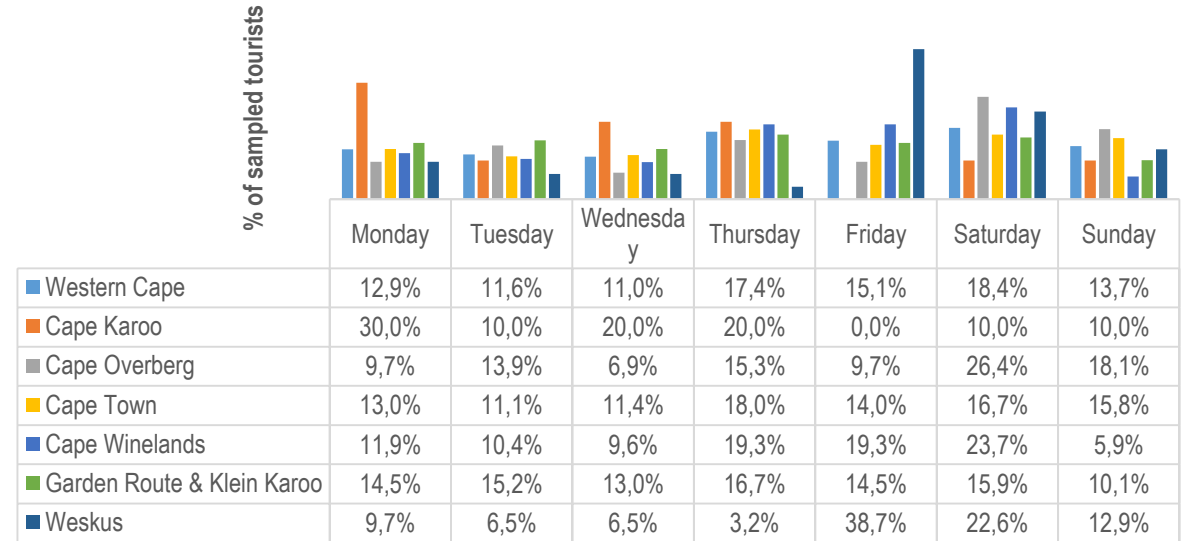# 8.2. Mobile Insights: International Visitor Trends

- International visitors to the province were most likely to arrive on a Saturday or Thursday and depart on a Sunday.

- In the Cape Winelands, Saturday was the most popular arrival and departure day.

- International visitors to the Garden Route & Klein Karoo arrived mostly on a Thursday and departed on a Saturday.

Popular Arrival Days of the Week: International, July 2022

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Western Cape	12,9%	11,6%	11,0%	17,4%	15,1%	18,4%	13,7%
Cape Karoo	30,0%	10,0%	20,0%	20,0%	0,0%	10,0%	10,0%
Cape Overberg	9,7%	13,9%	6,9%	15,3%	9,7%	26,4%	18,1%
Cape Town	13,0%	11,1%	11,4%	18,0%	14,0%	16,7%	15,8%
Cape Winelands	11,9%	10,4%	9,6%	19,3%	19,3%	23,7%	5,9%
Garden Route & Klein Karoo	14,5%	15,2%	13,0%	16,7%	14,5%	15,9%	10,1%
Weskus	9,7%	6,5%	6,5%	3,2%	38,7%	22,6%	12,9%

Source: Rove, 2022

Popular Departure Days of the Week: International, July 2022

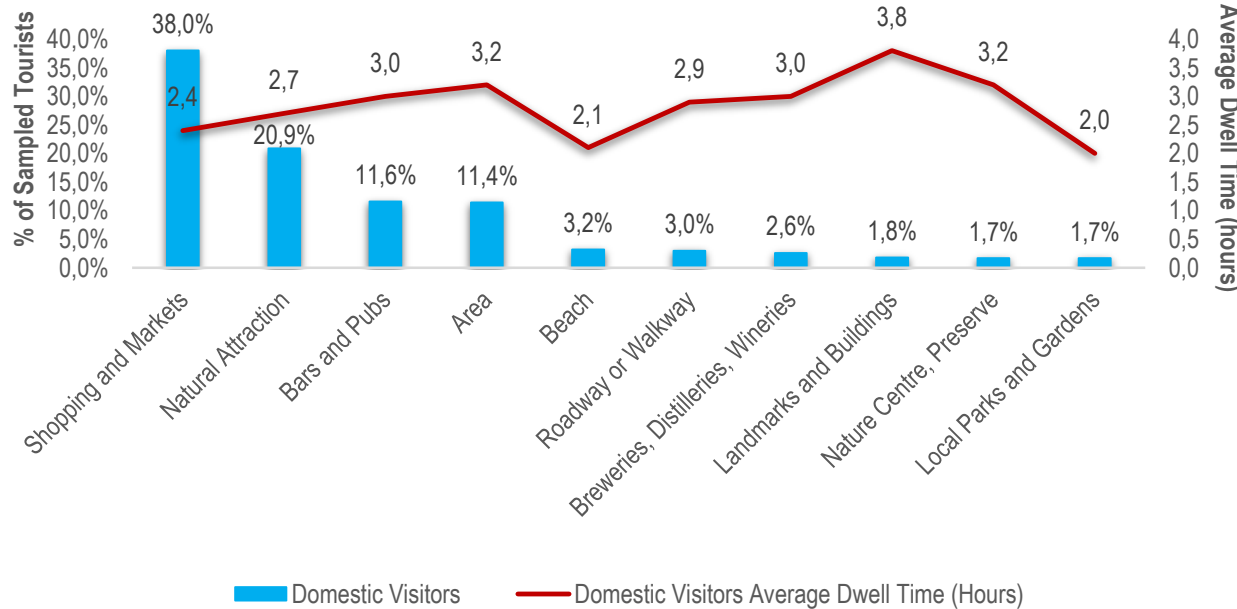|	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Western Cape	12,1%	10,7%	11,2%	15,4%	14,7%	16,1%	19,9%
Cape Karoo	30,0%	10,0%	20,0%	10,0%	20,0%	10,0%	0,0%
Cape Overberg	12,5%	9,7%	9,7%	13,9%	12,5%	15,3%	26,4%
Cape Town	13,7%	10,2%	11,5%	15,8%	15,8%	14,1%	18,9%
Cape Winelands	6,7%	12,6%	8,1%	14,8%	18,5%	20,0%	19,3%
Garden Route & Klein Karoo	8,7%	11,6%	13,8%	18,1%	8,7%	20,3%	18,8%
Weskus	12,9%	9,7%	6,5%	3,2%	6,5%	22,6%	38,7%

Source: Rove, 2022

- The sampled visitors (10) in the Cape Karoo, arrived and departed on a Monday.

- Cape Town arrival days were most common on Thursday or Saturday and departure was most popular on a Sunday.

- Saturday was the most popular arrival day in the Cape Overberg and Sunday was the most common departure day.

- In the Weskus, a Friday or Saturday was popular arrival days while Saturdays and Sundays were common departure days.

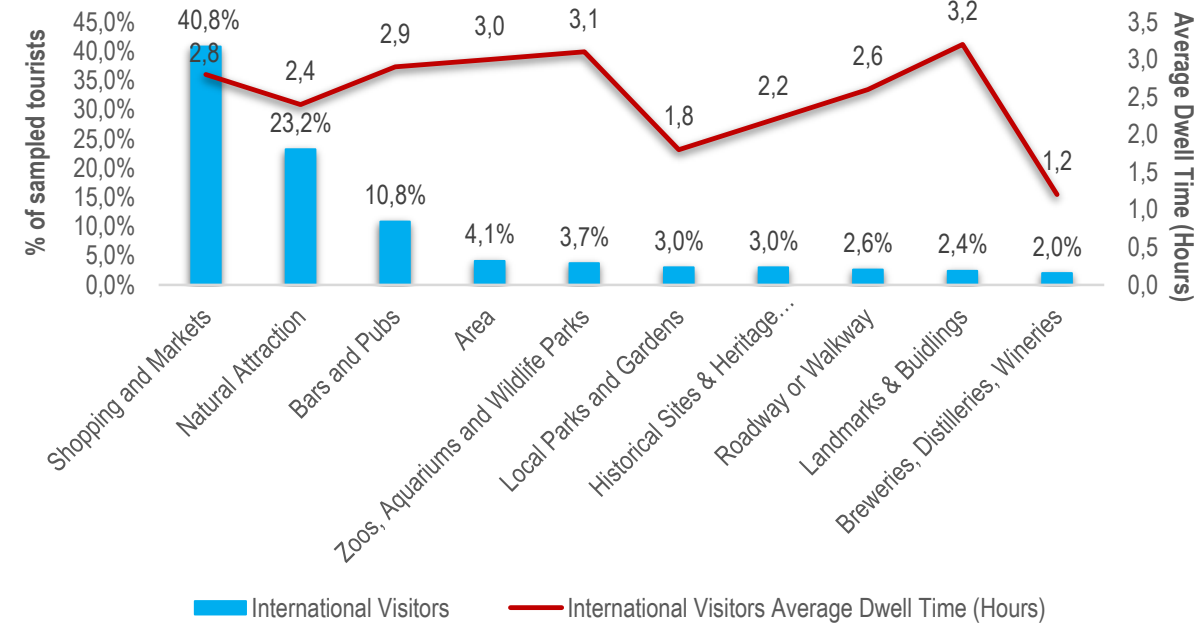An Inspiring Place To Do Business

8.3. Points of Interest (POIs) Visited

- Shopping and markets was the most popular type of attraction visited for both domestic and international tourists.

- Domestic visitors spent on average 2,4 hours shopping while international visitors shopped for 2,8 hours.

- 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 domestic and international tourists who spent on average 3,0 hours and 2,9 hours at the location, respectively.
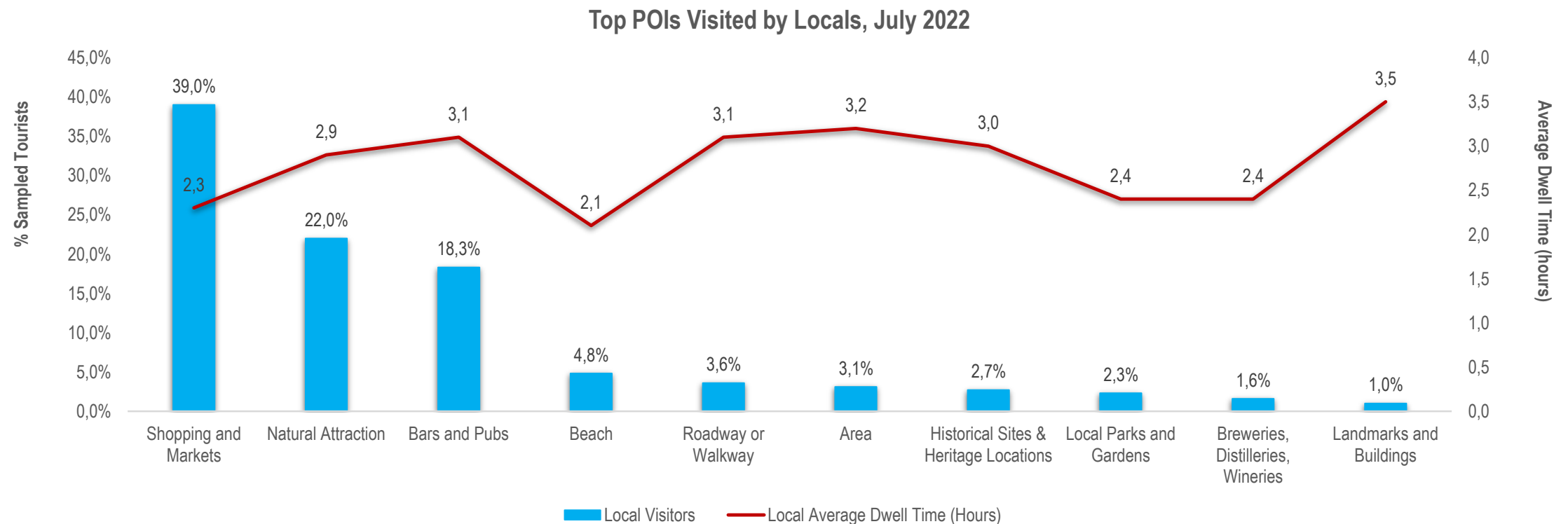
Top POIs Visited by Domestic Tourists, July 2022

Domestic Visitors — Domestic Visitors Average Dwell Time (Hours)

Source: Rove, 2022

Top POIs Visited by International Tourists, July 2022

International Visitors — International Visitors Average Dwell Time (Hours)

Source: Rove, 2022

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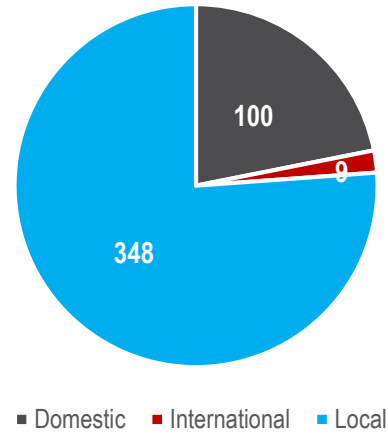
8.3. Points of Interest (POIs) Visited

- Similar to domestic tourist trends, shopping and markets, natural attractions and bars and pubs, ranked as the top three points of interests for local visitors. Locals spent on average 2,3 hours at shops and markets, 2,9 hours at natural attractions and 3,1 hours at bars and pubs.

- During July 2022, locals spent the longest time at resorts with an average dwell time of 6,3 hours, however, this was based on a sample of 13 local tourists.

Top POIs Visited by Locals, July 2022

Legend: Local Visitors ■ | Local Average Dwell Time (Hours) —

Source: Rove, 2022

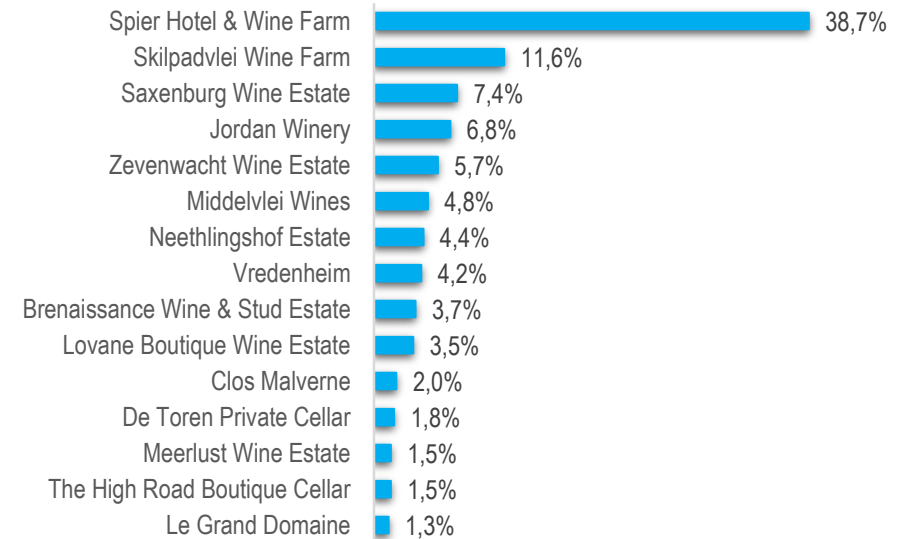**An Inspiring Place To Do Business**

8.4. Stellenbosch Valley Wine Route

- From a sample size of 457 tourists who visited the Stellenbosch Wine Route, over 70% were locals and 22% domestic.

- Spier was the most visited farm on the route, followed by Skilpadvlei and Saxenburg Wine Estates.

- Overgaauw Wine Estate (5,8 hours) and Boschkloof Wines (3,9 hours) had the longest dwell time.
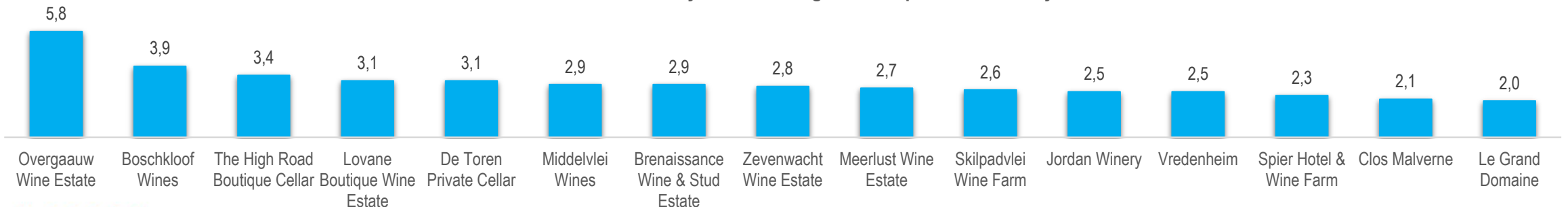
Sample Size: Visitors to Stellenbosch Wine Valley, July 2022

100

0

348

■ Domestic   ■ International   ■ Local

Stellenbosch Wine Valley Route: Top POIs Visited, July 2022

POI	%
Spier Hotel & Wine Farm	38,7%
Skilpadvlei Wine Farm	11,6%
Saxenburg Wine Estate	7,4%
Jordan Winery	6,8%
Zevenwacht Wine Estate	5,7%
Middelvlei Wines	4,8%
Neethlingshof Estate	4,4%
Vredenheim	4,2%
Brenaissance Wine & Stud Estate	3,7%
Lovane Boutique Wine Estate	3,5%
Clos Malverne	2,0%
De Toren Private Cellar	1,8%
Meerlust Wine Estate	1,5%
The High Road Boutique Cellar	1,5%
Le Grand Domaine	1,3%

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

POI	Hours
Overgaauw Wine Estate	5,8
Boschkloof Wines	3,9
The High Road Boutique Cellar	3,4
Lovane Boutique Wine Estate	3,1
De Toren Private Cellar	3,1
Middelvlei Wines	2,9
Brenaissance Wine & Stud Estate	2,9
Zevenwacht Wine Estate	2,8
Meerlust Wine Estate	2,7
Skilpadvlei Wine Farm	2,6
Jordan Winery	2,5
Vredenheim	2,5
Spier Hotel & Wine Farm	2,3
Clos Malverne	2,1
Le Grand Domaine	2,0

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Source: Rove, 2022

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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.)
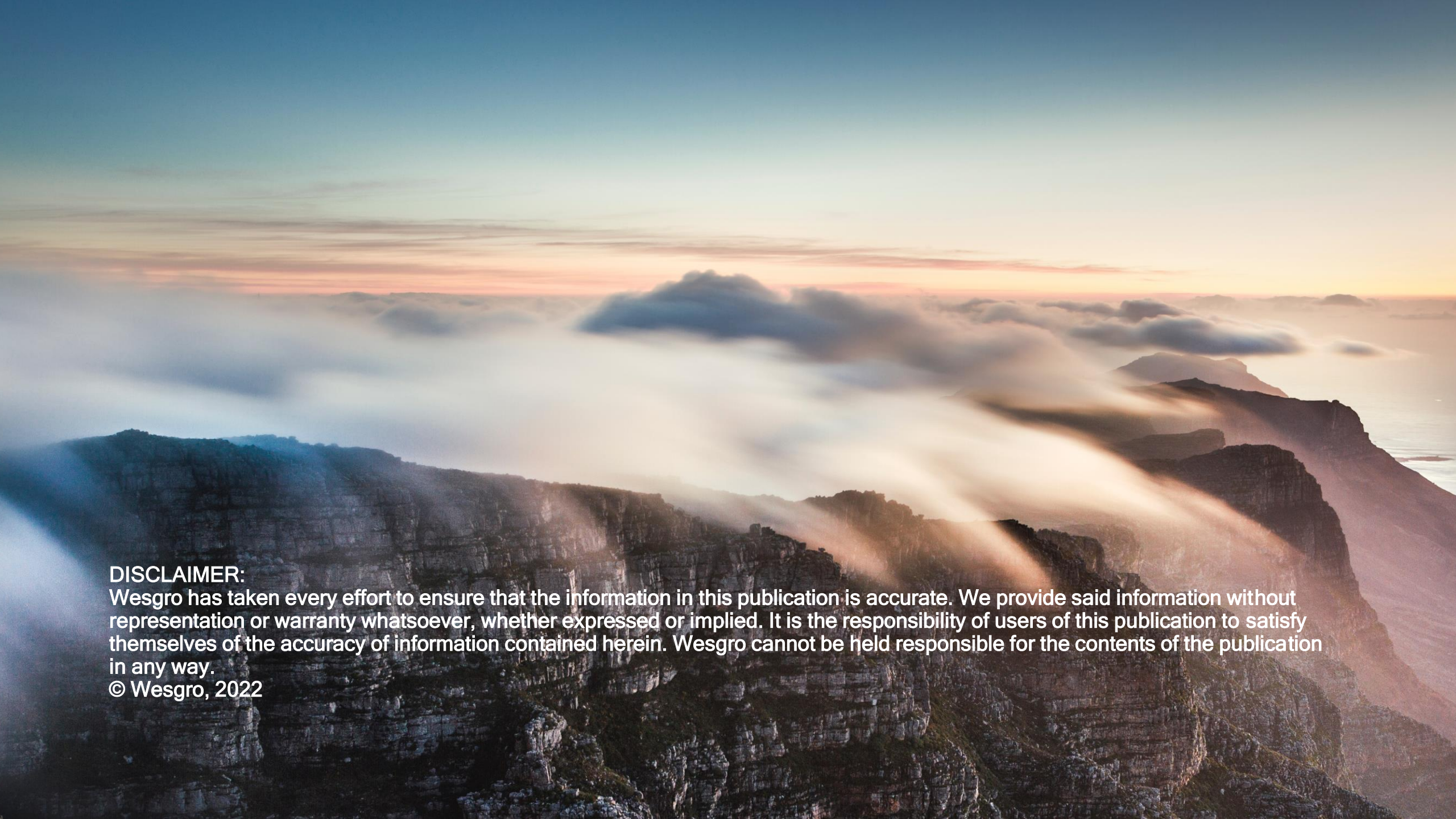
Source: Rove, 2022

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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:
- 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:
- 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:
- 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?
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

Source: Rove, 2022

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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, an d 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 a s "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 t he geography.

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