

Tourism Research Overview August 2023

Cape Town & the Western Cape

WESGRO

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

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Key Findings

The Western Cape's tourism sector remained steady during the winter period, reflecting consecutive monthly and year-to-date (YTD) growth rates in passenger movement through CTIA's international and domestic terminals. Key highlights of the overall tourism performance in August 2023 are outlined below:

- Two-way passengers through the CTIA international terminal remained strong between Jan and Aug 2023, reaching more than 1.7 million passengers YTD, exceeding pre-pandemic levels by 107% and growing by 64% vs. Jan – Aug 2022. *(Data Source: ACSA, 2023)*
- Over 4.3 million two-way passengers passed through the CTIA domestic terminal between Jan and Aug 2023, standing at 80% recovery against the same period in 2019 and a y-o-y growth of 12% YTD. *(Data Source: ACSA, 2023)*
- Two-way passengers through George Airport reached 511,919 between Jan and Aug 2023, representing a 3% year-on-year increase vs. Jan - Aug 2022. *(Data Source: ACSA, 2023)*
- Between January and August 2023, Cape Town recorded a total of 562,818 tourist arrivals via air, of which **90% originated from overseas markets and 10% from the African continent**. Total tourist arrivals as well as overseas tourist arrivals via air remained at full recovery in August 2023 YTD vs. Jan – Aug 2019. *(Data Source: StatsSA, 2023)*
- **UK led as the top source market to Cape Town (via air)** between January and August 2023, closely followed by the USA, Germany, Netherlands and France in the top 5 positions. The European market remains the largest contributor to tourist arrivals into Cape Town, **with 6 out of the top 10 source markets originating from the continent**. *(Data Source: StatsSA, 2023)*
- The cumulative total of tourist arrivals between January and August 2023 reflected full recovery from **8 out of the top 10 source markets to Cape Town (via air)**, against the same period in 2019 (Jan - Aug). These markets included UK (105%), USA (143%), Germany (105%), Netherlands (112%), Italy (109%), India (100%), Canada (104%) and Zimbabwe (178%). *(Data Source: StatsSA, 2023)*
- Footfall to 36 participating attractions across the six regions of the Western Cape recorded a total of 607,353 visitors in August 2023, a 72% growth in the number of visitors when compared to August 2022 and 95% of what it was in August 2019. *(Data Source: Local Tourism Offices (LTOs) & Attractions, 2023)*
- The top 5 highest year-on-year growth rates in August 2023 were recorded for Table Mountain Aerial Cableway (856%), Table Mountain National Park (100%), Groot Winterhoek Wilderness Area (96%), West Coast National Park (89%) and Harold Porter National Botanical Garden (88%). The high year-on-year increase for Table Mountain Aerial Cableway was largely due to the closure period in August 2022 for annual maintenance. *(Data Source: Local Tourism Offices (LTOs) & Attractions, 2023)*

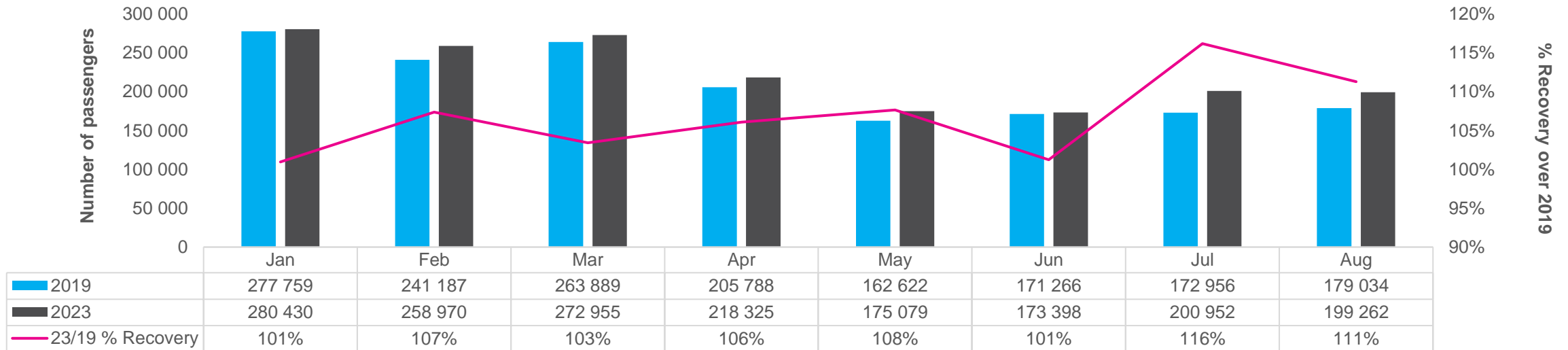
International passenger recovery between Jan and Aug 2023 remains above pre-pandemic levels and stands at 107% YTD.

Year/Month	2019	2020	2021	2022	2023 ytd	2023					
						Mar	Apr	May	Jun	Jul	Aug
Two-way passengers	2 606 398	810 811	525 441	1 895 975	1 779 371	272 955	218 325	175 079	173 398	200 952	199 262
YoY growth percentage*	1%	-69%	-35%	261%	64%	70%	39%	46%	39%	34%	34%

* Growth compared to the same period in the previous year

Source: ACSA, 2023

INTERNATIONAL TWO-WAY PASSENGER RECOVERY, JAN-AUG 2023



Source: ACSA, 2023

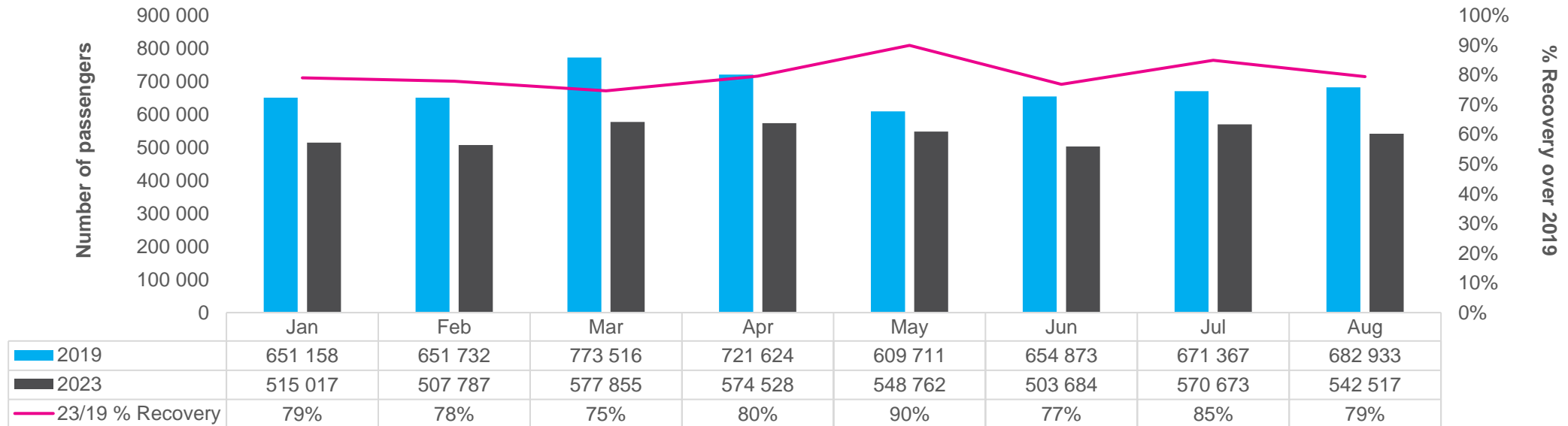
Domestic passengers at 80% recovery between Jan and Aug 2023

Year/Month	2019	2020	2021	2022	2023 ytd	2023					
						Mar	Apr	May	Jun	Jul	Aug
Two-way passengers	8 363 307	3 167 542	4 221 365	5 960 826	4 340 823	577 855	574 528	548 762	503 684	570 673	542 517
YoY growth percentage*	2%	-62%	33%	41%	12%	-12%	7%	9%	24%	25%	18%

* Growth compared to the same period in the previous year

Source: ACSA, 2023

TWO-WAY DOMESTIC PASSENGER RECOVERY, JAN-AUG 2023



Source: ACSA, 2023

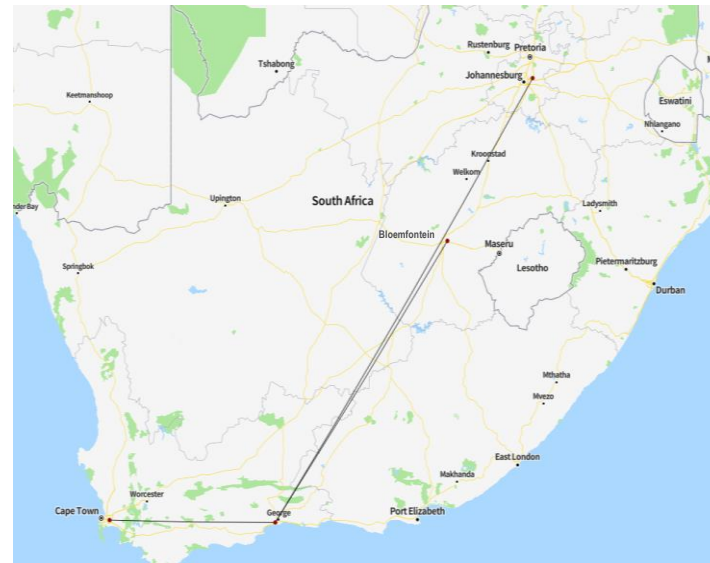
George Airport two-way passengers reached 511,919 between Jan and Aug 2023, registering a 3% increase vs. Jan - Aug 2022.

Year/Month	2019	2020	2021	2022	2023 ytd	2023					
						Mar	Apr	May	Jun	Jul	Aug
Two-way passengers	840 804	346 223	539 637	747 848	511 919	70 062	70 165	63 532	58 312	64 346	62 082
YoY growth percentage*	0%	-59%	56%	39%	3%	-3%	-4%	3%	4%	2%	2%

* Growth compared to the same period in the previous year

Source: ACSA, 2023

Operating carriers



Source: OAG Schedules Analyser








CPT International schedule for IATA Summer 2023 (April - October)

24 airlines & 28 destinations




Rest of Africa

	Air Botswana	Gaborone (GBE) 3x per week
	Air Mauritius	Mauritius (MRU) 2x week
	Airlink	Windhoek (WDH) 2x a day Walvis Bay (WVB) Daily Harare (HRE) Daily Victoria Falls (VFA) 6x week Maun (MUB) Daily Maputo (MPM) 4x week
	Eswatini Air	Manzini (SHO) 3x week
	Ethiopian Airlines	Addis Ababa (ADD) 11x per week
	FlyNamibia	Windhoek (WDH) 6x per week Walvis Bay (WVB)* 4x per week <i>*Starting 27 Oct 2023</i>
	Kenya Airways	Nairobi (NBO) 3x week, NBO – Livingstone (LVI) 2x week NBO – Victoria Falls (VFA) 3x week
	LAM	Maputo (MPM)* 3x per week <i>*Starting 15 Oct 2023</i>
	Proflight Zambia	Lusaka (LUN) 2x week
	RwandAir	Kigali (KGL) - Harare (HRE) 6x week
	TAAG	Luanda (LAD) Daily




Europe

	Air Belgium	Belgium (BRU)* 2x per week <i>*Suspended from 3 Oct 2023</i>
	British Airways	London Heathrow (LHR) Daily
	Condor	Frankfurt (FRA)* 5x per week <i>*Seasonal returning 30 September</i>
	Edelweiss	Zurich (ZRH)* 4x per week <i>*Seasonal returned 31 August</i>
	KLM	Amsterdam (AMS) Daily
	Lufthansa	Frankfurt (FRA) 6x per week
	Turkish Airlines	Istanbul (IST) 5x per week

North & South America

	Delta Air Lines	Atlanta (ATL) 3x per week
	United Airlines	Newark (EWR) 3x per week Washington D.C (IAD) 3x per week
	South African Airways	São Paulo (GRU)* 2x per week <i>*Starting 31 Oct 2023</i>

Asia & Middle East

	Emirates	Dubai (DXB) 2x Daily
	Qatar Airways	Doha (DOH) 10x per week
	Singapore Airlines	Singapore (SIN)* Daily <i>*SIN-JNB-CPT-JNB-SIN</i>

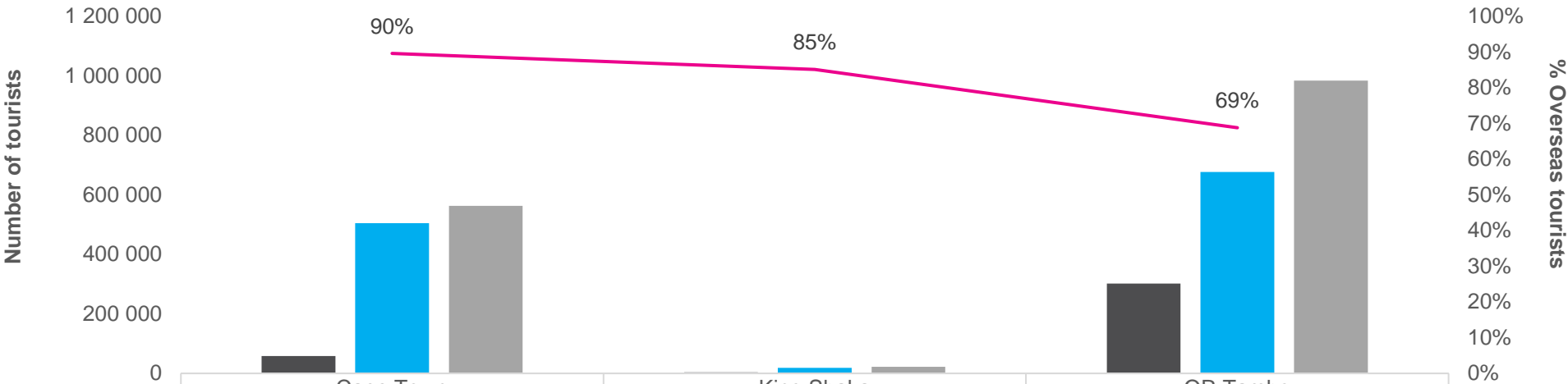


Source: OAG

Performance of Air Arrivals to Cape Town: Jan - Aug 2023

Between January and August 2023, Cape Town recorded a total of **562,818** tourist arrivals via air, of which 90% originated from overseas markets and 10% from the African continent. Total tourist arrivals as well as overseas tourist arrivals via air remained at **full recovery** in August 2023 YTD vs. Jan – Aug 2019.

TOURIST ARRIVALS BY SOUTH AFRICAN AIRPORT, JAN-AUG 2023



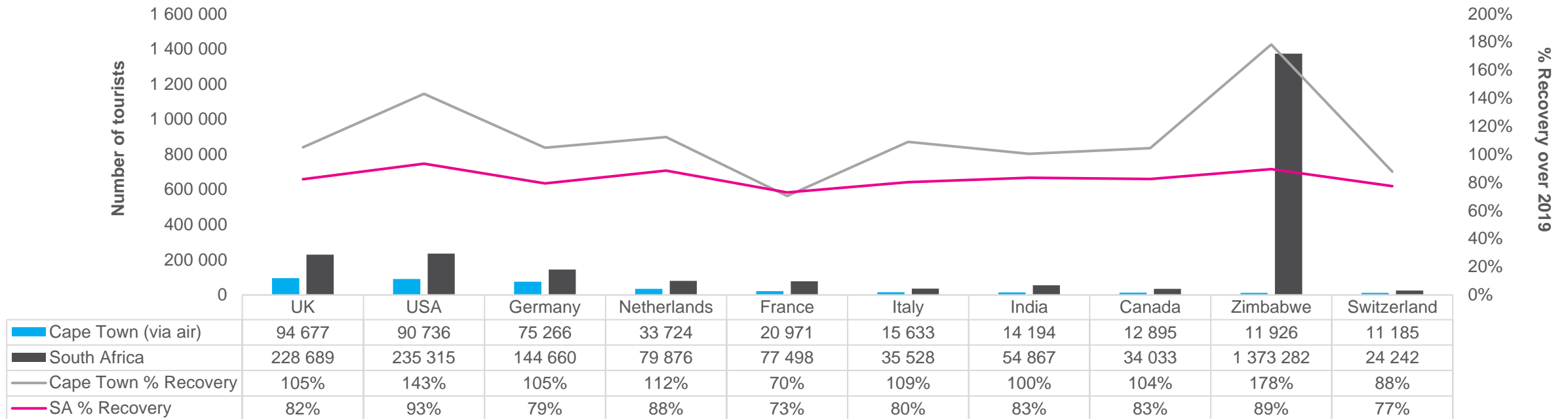
	Cape Town	King Shaka	OR Tambo
■ Africa Tourist Arrivals	57 599	3 184	301 791
■ Overseas Tourist Arrivals	504 446	18 292	676 727
■ Total Tourist Arrivals	562 818	21 491	983 669
— Overseas % Share of Total Tourists	90%	85%	69%

Source: StatsSA, 2023

Top Markets to Cape Town (via air): Jan - Aug 2023 YTD

- **UK led as the top source market to Cape Town (via air)** between January and August 2023, closely followed by the USA, Germany, Netherlands and France in the top 5 positions. The European market remains the largest contributor to tourist arrivals into Cape Town, **with 6 out of the top 10 source markets originating from the continent.**
- The cumulative total of tourist arrivals between January and August 2023 reflected full recovery from **8 out of the top 10 source markets to Cape Town (via air)**, against the same period in 2019 (Jan - Aug). These markets included UK (105%), USA (143%), Germany (105%), Netherlands (112%), Italy (109%), India (100%), Canada (104%) and Zimbabwe (178%).

Tourist Arrivals to Cape Town (via air) and South Africa, Jan-Aug 2023

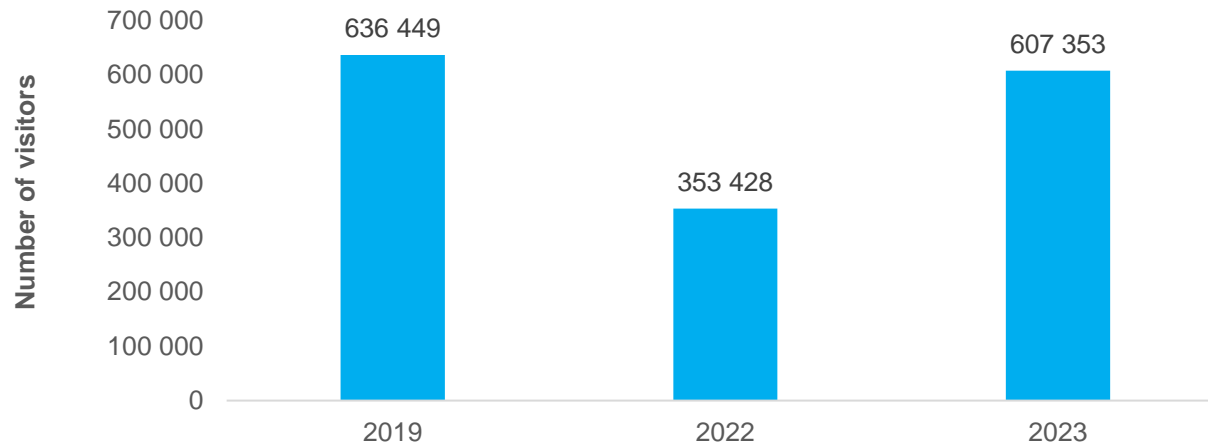


Source: StatsSA, 2023

Performance of Western Cape Attractions: August 2023

- Footfall to 36 participating attractions across the six regions of the Western Cape recorded a total of 607,353 visitors in August 2023, a **72% growth in the number of visitors** when compared to August 2022 and **95% of what it was in August 2019**.
- The top 5 highest year-on-year growth rates in August 2023 were recorded for Table Mountain Aerial Cableway (856%), Table Mountain National Park (100%), Groot Winterhoek Wilderness Area (96%), West Coast National Park (89%) and Harold Porter National Botanical Garden (88%). The high increase for Table Mountain Aerial Cableway was largely due to the closure period in August 2022 for annual maintenance.

VISITORS TO WESTERN CAPE ATTRACTIONS, AUG 2019-2023



Western Cape Attractions	August 22/23 % Change
Cape Town	
Kirstenbosch National Botanical Garden	15%
Table Mountain Aerial Cableway	856%
Table Mountain National Park	100%
Table Mountain National Park: Boulders	57%
Table Mountain National Park: Cape of Good Hope	45%
Robben Island	-7%
Overberg	
Agulhas National Park	-4%
Bontebok National Park	1%
Cape Agulhas Lighthouse	19%
Harold Porter National Botanical Garden	88%
Shipwreck Museum	-39%
Grootvadersbosch Nature Reserve	-19%
Marloth Nature Reserve	-1%
The Whale Trail	-8%
Walker Bay Nature Reserve	23%
De Hoop Nature Reserve	-28%
De Mond Nature Reserve	-90%
Kogelberg Nature Reserve	11%
Garden Route & Klein Karoo	
Cango Caves	42%
Tsitsikamma National Park	28%
Wilderness National Park	21%
Knysna National Park	3%
Goukamma Nature Reserve	-15%
Keurbooms River Nature Reserve	30%
Robberg Nature Reserve	20%
Weskus	
West Coast National Park	89%
!Khwa ttu	27%
Cederberg-Algeria Nature Reserve	-29%
Cederberg-Kliphuis Nature Reserve	-75%
Groot Winterhoek Wilderness Area	96%
Matjiesrivier Nature Reserve	-61%
Rocherpan Nature Reserve	-13%
Winelands	
Protea Tractor Trip	7%
Birds Paradise	-16%
Viljoensdrift River Cruise	-29%
Cape Karoo	
Karoo National Park	8%

Visitor Trends Mobile Location Data Insights

Western Cape Mobile Location Data Insights

What is mobile location data?

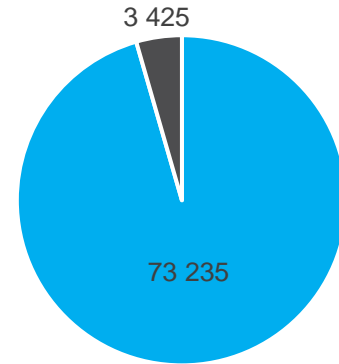
- Geo or spatial data from smartphones. When a user installs an app, they are often asked to share their location data with the company which provides the app, and other companies who are partners with the app publisher.
- Users can “opt in” to location sharing (or choose not to “opt in”). When they 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.

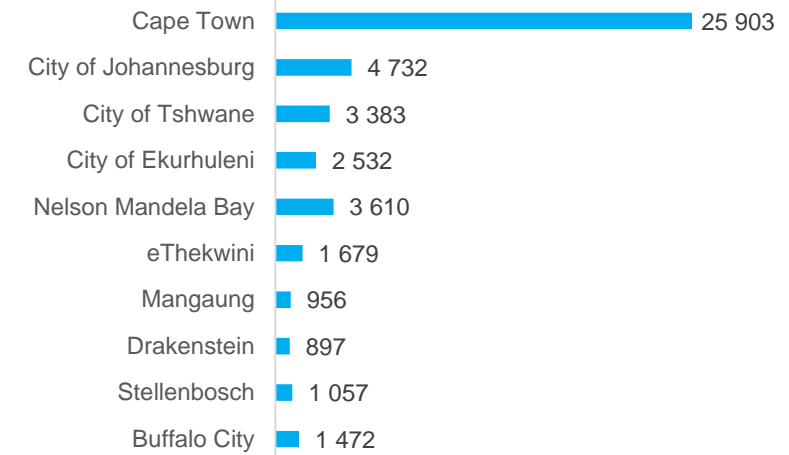
The insights in this report represent mobile location data from a sample of **73,235 domestic** and **3,425 international** tourists who visited the Western Cape in June 2023. Within the domestic data set, **25,903** of the sampled tourists were from Cape Town and from the international sampled tourists, **620** were from the United States.

Sample Size, Aug. 2023

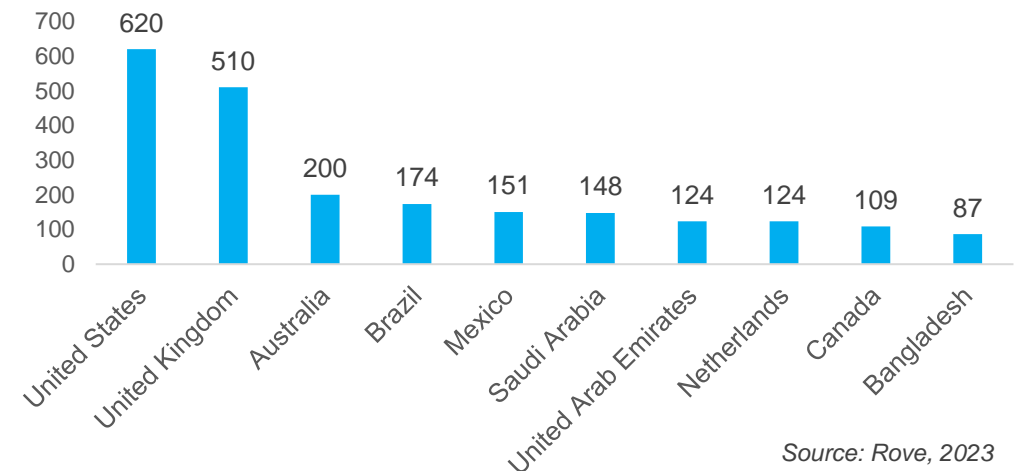


■ Domestic ■ International

Domestic Origin Municipality, Aug. 2023



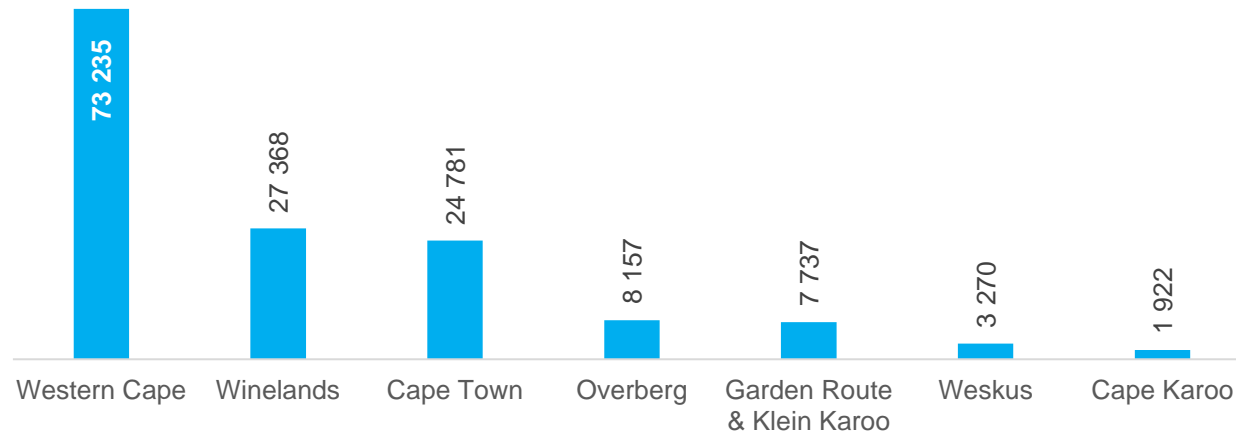
International Origin Country, Aug. 2023



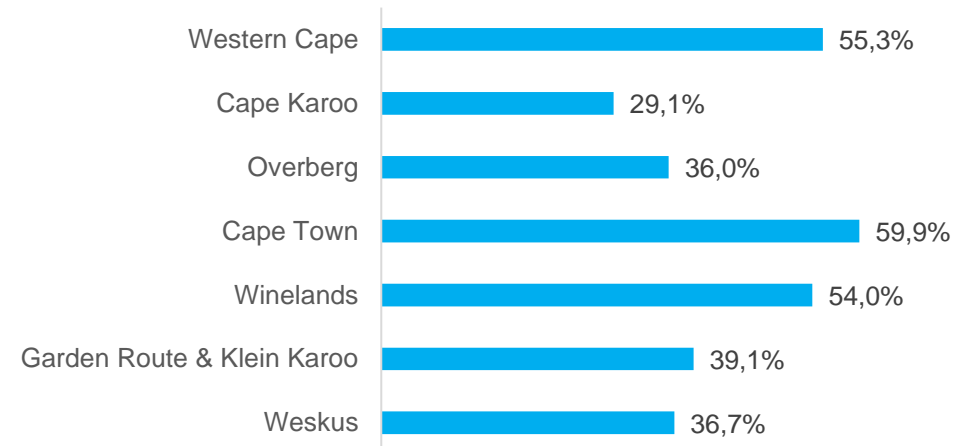
Mobile Insights: Domestic Visitor Trends

- In August 2023, **Winelands (33.8%)** and **Cape Town (33.8%)** saw the most domestic tourists in terms of volume of sample size and Cape Karoo (2.6%) the least.
- **Cape Town (59.9%)** and **Winelands (54.0%)** was the most popular regions for domestic repeat visits during the month of August.

Domestic Sample Size, Aug. 2023

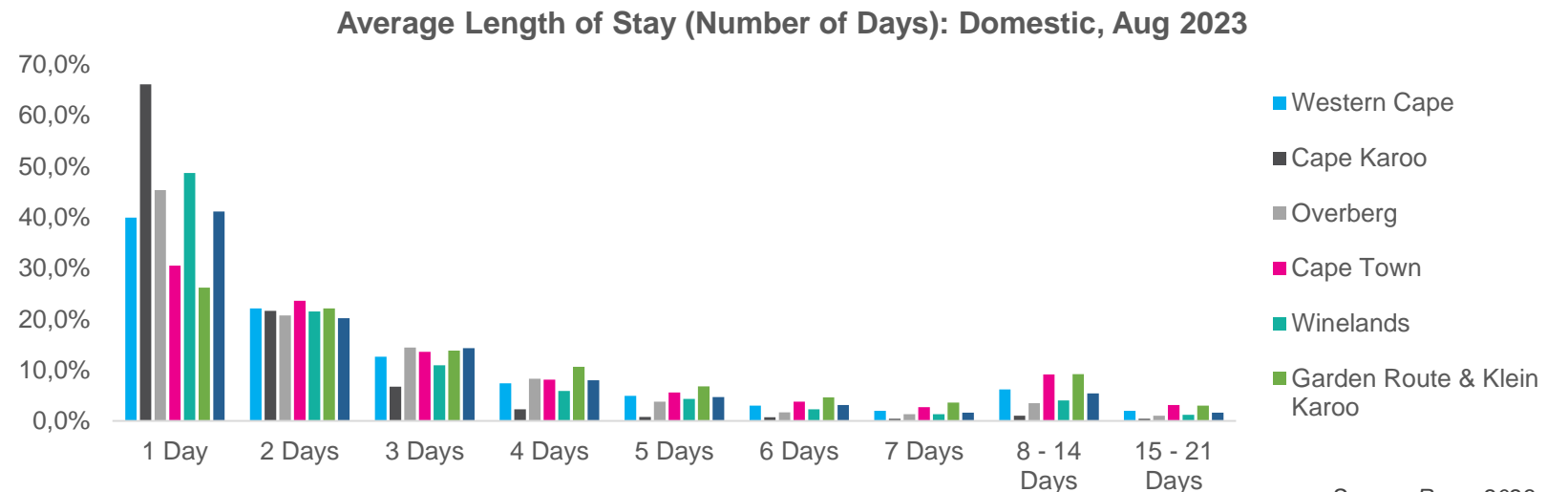
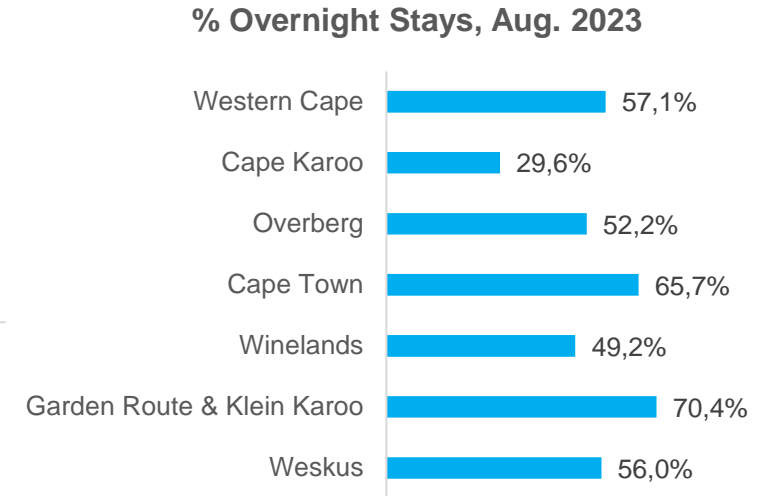
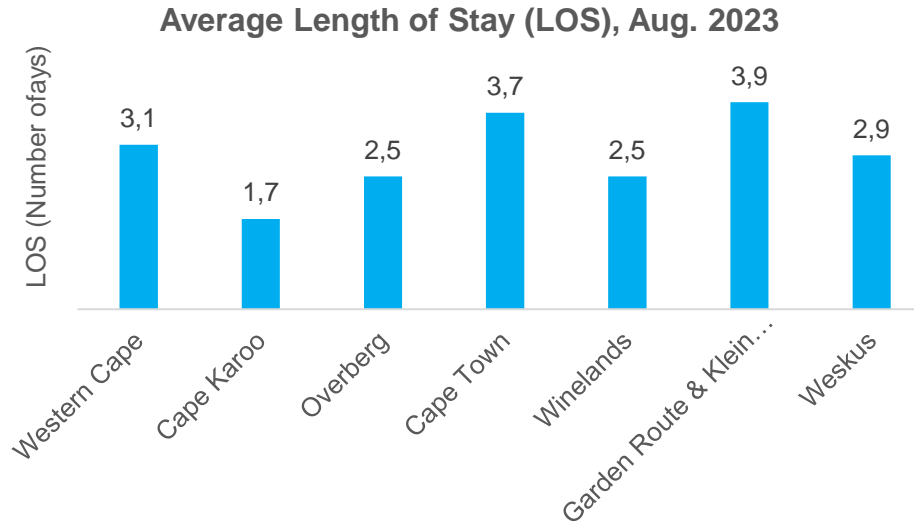


Domestic Repeat Visitors, Aug. 2023



Mobile Insights: Domestic Visitor Trends

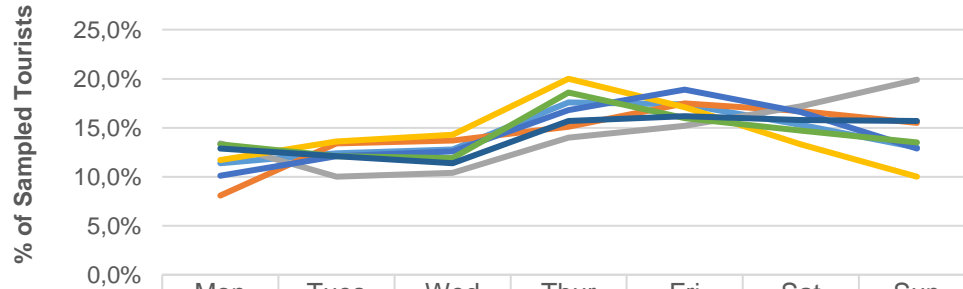
- On average, domestic tourists spent the longest time in the **Garden Route & Klein Karoo (3.9)**, **Cape Town (3.7)**, **Weskus (2.9)** and **Overberg and Winelands (2.5)** respectively).
- 70.4% of sampled tourists** stayed overnight in the Garden Route & Klein Karoo 56.0% in Weskus.
- In contrast, domestic tourists to the Cape Karoo were more likely to stay for the day.



Mobile Insights: Domestic Visitor Trends

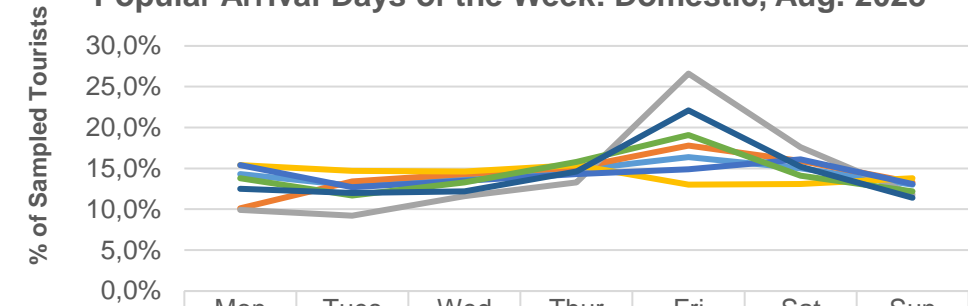
- Domestic tourists to the province were most likely to arrive on a Friday and depart on a Thursday. This trend was also seen in the Garden Route & Klein Karoo pointing to the popularity of weekend stays in the province.
- In the **Overberg**, Friday was the most popular arrival day and departure was Sunday.
- In the **WineLands**, Saturday was the most popular arrival day and departure was most common on a Friday.

Popular Departure Days of the Week: Domestic, Aug. 2023



Western Cape	11,4%	12,4%	12,8%	17,6%	17,4%	15,3%	13,0%
Cape Karoo	8,1%	13,4%	13,7%	15,1%	17,5%	16,7%	15,5%
Overberg	13,4%	10,0%	10,4%	14,0%	15,2%	17,2%	19,9%
Cape Town	11,7%	13,6%	14,3%	20,0%	17,1%	13,3%	10,0%
WineLands	10,1%	12,1%	12,6%	16,8%	18,9%	16,6%	12,9%
Garden Route & Klein Karoo	13,3%	12,1%	11,9%	18,6%	16,0%	14,7%	13,5%
Weskus	12,9%	12,1%	11,4%	15,7%	16,2%	15,8%	15,7%

Popular Arrival Days of the Week: Domestic, Aug. 2023



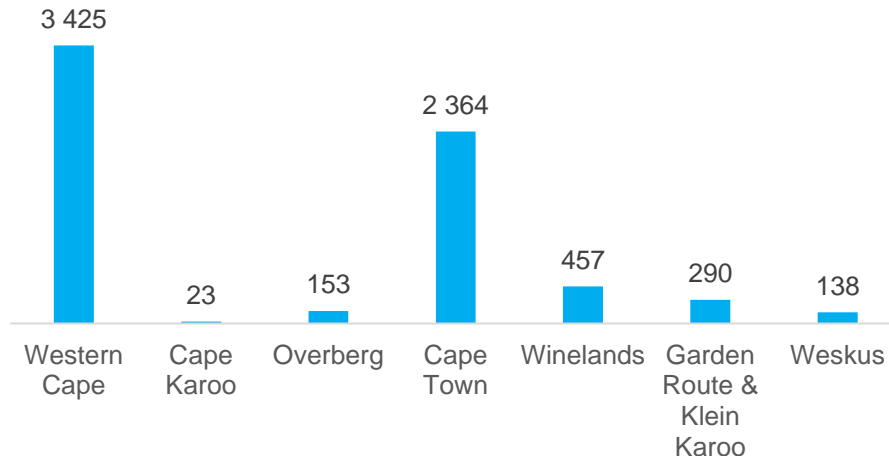
Western Cape	14,3%	12,9%	13,9%	14,8%	16,4%	15,0%	13,0%
Cape Karoo	10,1%	13,4%	14,3%	15,1%	17,8%	15,9%	13,3%
Overberg	9,9%	9,2%	11,6%	13,3%	26,6%	17,6%	11,8%
Cape Town	15,4%	14,7%	14,6%	15,4%	13,0%	13,1%	13,8%
WineLands	15,4%	12,7%	13,5%	14,3%	14,9%	16,1%	13,1%
Garden Route & Klein Karoo	13,8%	11,7%	13,3%	15,8%	19,1%	14,1%	12,2%
Weskus	12,5%	12,0%	12,2%	14,6%	22,1%	15,2%	11,4%

- Tourists to the **Garden Route & and Klein Karoo** generally arrived on a Friday and departed on a Thursday
- In the **Cape Karoo**, Friday was the most common day of arrival and departure day amongst tourists.
- Cape Town** arrival days were most common on a Monday or Thursday and departure was most popular on a Thursday.
- In the **Weskus**, Friday was the most popular arrival day and departure.

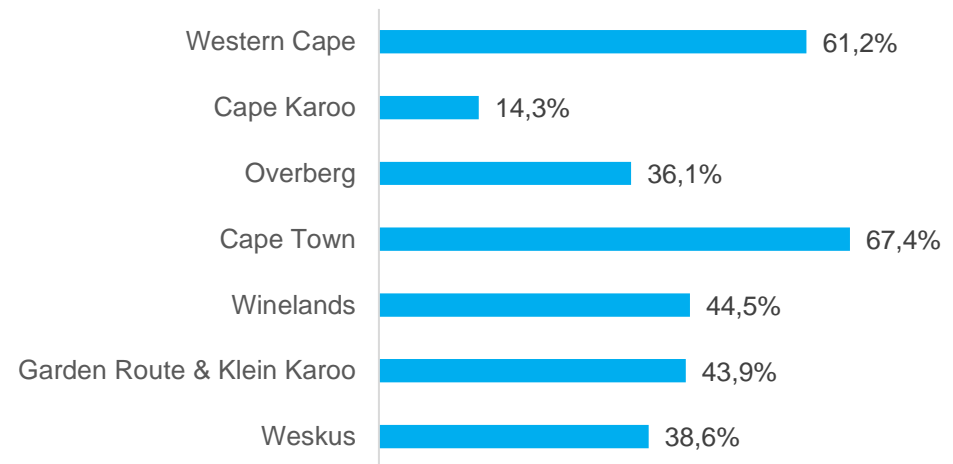
Mobile Insights: International Visitor Trends

- **Nearly 70%** of the sampled international tourists visited Cape Town followed by 4.0% who visited the Weskus.
- Visitor trends for the Cape Karoo are based on a sample size of only 23 international tourists and therefore do not provide an accurate statistical representation of the region.
- Cape Town (67.4%) and Winelands (44.5%) saw the most international repeat visitors in August 2023.

International Sample Size, Aug. 2023

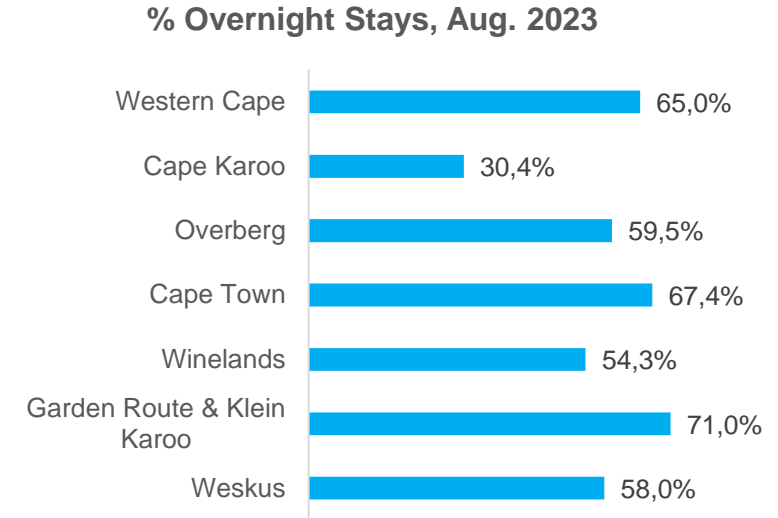
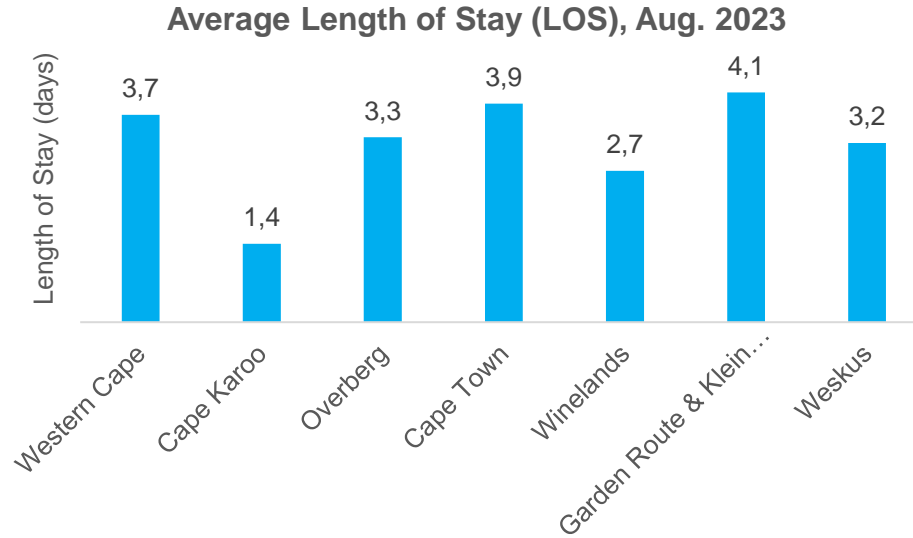


International Tourists Repeat Visits, Aug. 2023

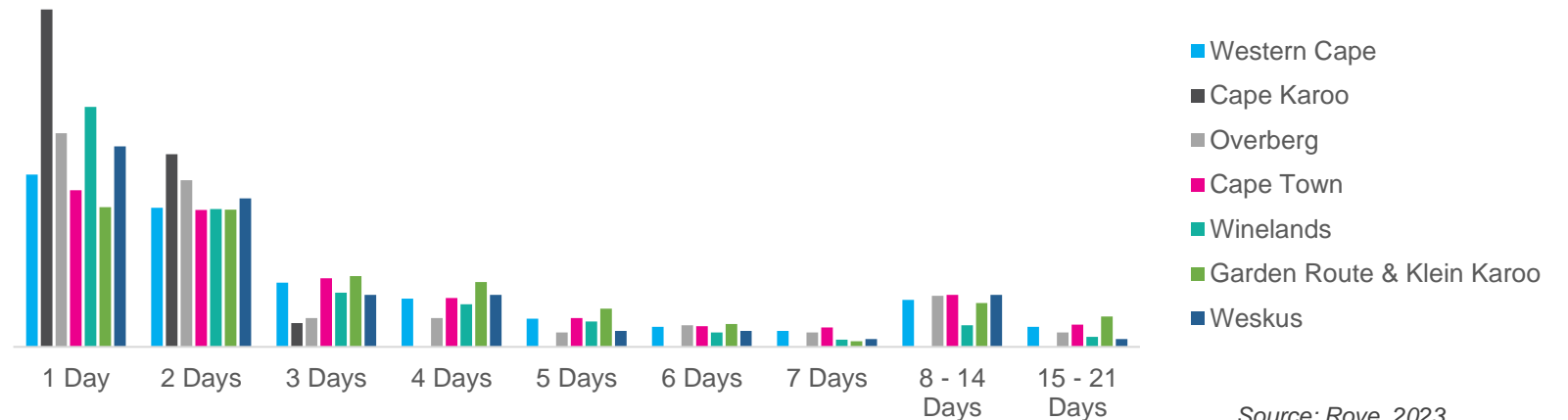


Mobile Insights: International Visitor Trends

- International tourists spent the longest time in Garden Route & Klein Karoo (4.1 days) and Cape Town (3.9 days).
- Over 70% of sampled tourists stayed overnight in Garden Route & Klein Karoo and nearly 70% stayed overnight in Cape Town.
- Nearly 60% of sampled tourists stayed overnight in the Overberg and Winelands and 30.4% in the Cape Karoo.
- An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.



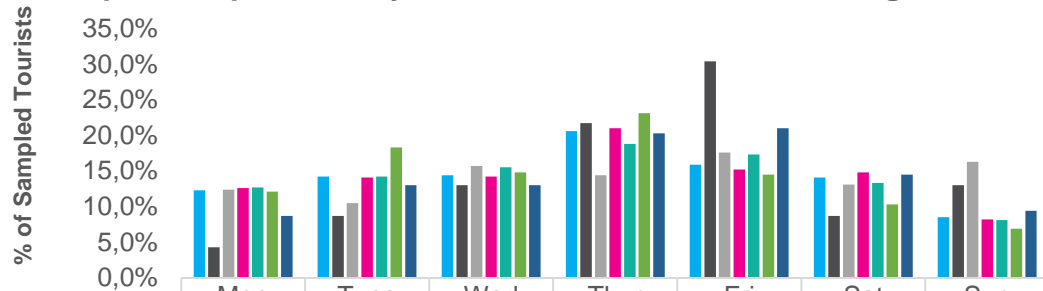
Average Length of Stay (Number of Days): International, Aug. 2023



Mobile Insights: International Visitor Trends

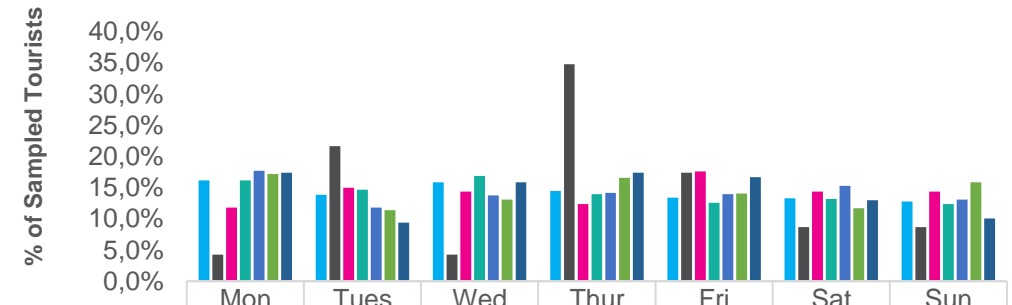
- During August 2023, international tourists to the province mainly arrived on a Monday, while departures were mostly on a Thursday.
- In **Cape Town**, a Wednesday was the most popular arrival day, and Thursday was the most common for departures.
- International tourists to the **Winelands** arrived mostly on a Monday and departed on a Thursday.

Popular Departure Days of the Week: International, Aug. 2023



Western Cape	12,3%	14,2%	14,4%	20,6%	15,9%	14,1%	8,5%
Cape Karoo	4,3%	8,7%	13,0%	21,7%	30,4%	8,7%	13,0%
Overberg	12,4%	10,5%	15,7%	14,4%	17,6%	13,1%	16,3%
Cape Town	12,6%	14,1%	14,2%	21,0%	15,2%	14,8%	8,2%
Winelands	12,7%	14,2%	15,5%	18,8%	17,3%	13,3%	8,1%
Garden Route & Klein Karoo	12,1%	18,3%	14,8%	23,1%	14,5%	10,3%	6,9%
Weskus	8,7%	13,0%	13,0%	20,3%	21,0%	14,5%	9,4%

Popular Arrival Days of the Week: International, Aug. 2023

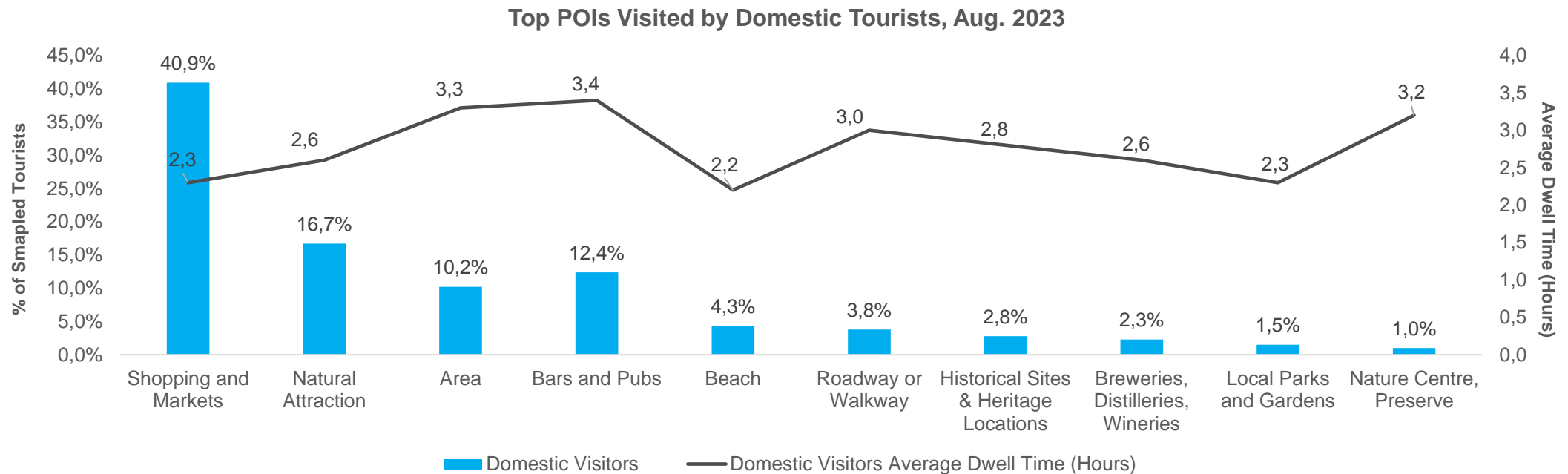


Western Cape	16,2%	13,9%	15,9%	14,5%	13,4%	13,3%	12,8%
Cape Karoo	4,3%	21,7%	4,3%	34,8%	17,4%	8,7%	8,7%
Overberg	11,8%	15,0%	14,4%	12,4%	17,6%	14,4%	14,4%
Cape Town	16,2%	14,7%	16,9%	14,0%	12,6%	13,2%	12,4%
Winelands	17,7%	11,8%	13,8%	14,2%	14,0%	15,3%	13,1%
Garden Route & Klein Karoo	17,2%	11,4%	13,1%	16,6%	14,1%	11,7%	15,9%
Weskus	17,4%	9,4%	15,9%	17,4%	16,7%	13,0%	10,1%

- The sampled tourists (23) in the **Cape Karoo**, arrived on a Thursday and departed mostly on Friday.
- **Garden Route & Klein Karoo** arrival day was most common on a Monday and departures were on a Thursday.
- Monday or Thursday were the most popular arrival days, and departure day in **Weskus** was mostly on a Friday.
- In the **Overberg**, Friday was popular for arrival day and departure.

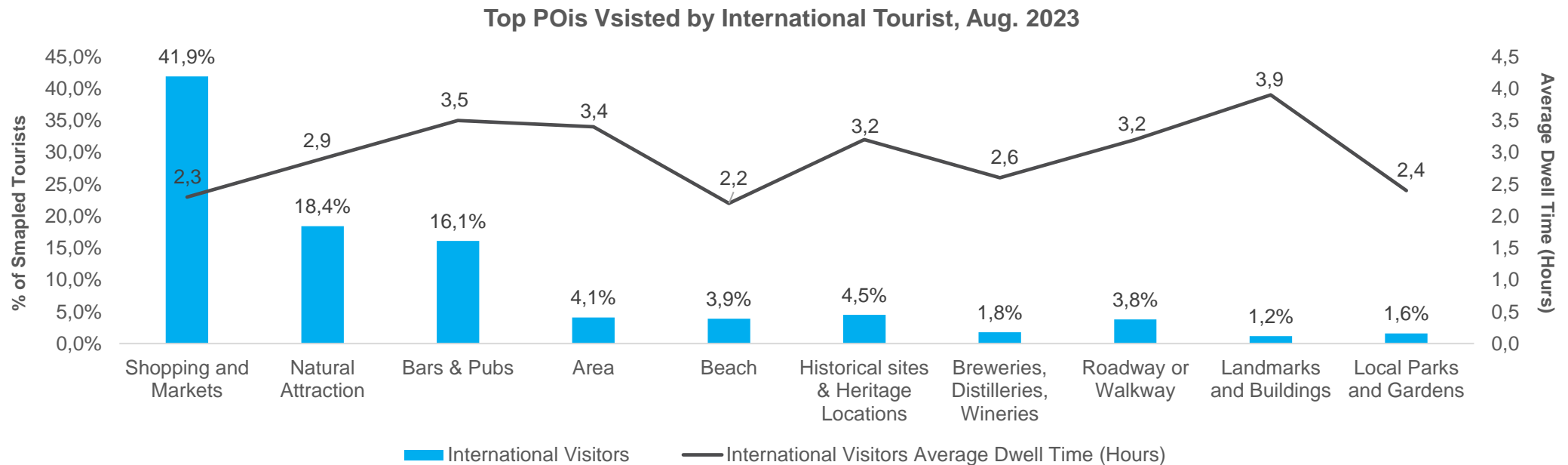
Points of Interest (POIs) Visited: Domestic Tourists

- Shopping and markets were the most popular type of attraction visited by domestic tourists with an average dwell time of 2.3 hours.
- Natural attractions ranked as the second most popular point of interest among domestic tourists.
- Spending time in areas like Cederberg Wilderness, Stanford Valley, Hemel-en-Aarde Valley and Van Dyk's Bay ranked third amongst the top POIs visited by domestic tourists, with an average dwell time of 3.3 hours.
- Bars & Pubs were the fourth most popular point of interest and domestic tourists spent an average of 3.4 hours at the location.



Points of Interest (POIs) Visited: International Tourists

- Shopping and markets were the most popular type of attraction visited by international tourists and they shopped on average for 2.3 hours.
- Natural attractions, particularly Table Mountain, Cape Point, and Knysna Waterfront ranked as the second most popular POI visited by international tourists, with an average dwell time of 2.9 hours.
- Bars & Pubs were the third most popular POI for international tourists who spent an average of 3.5 hours at the location.
- Natural attractions ranked as the fourth most popular point of interest among domestic tourists, with the highest average dwell time of 3.6 hours.



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.)

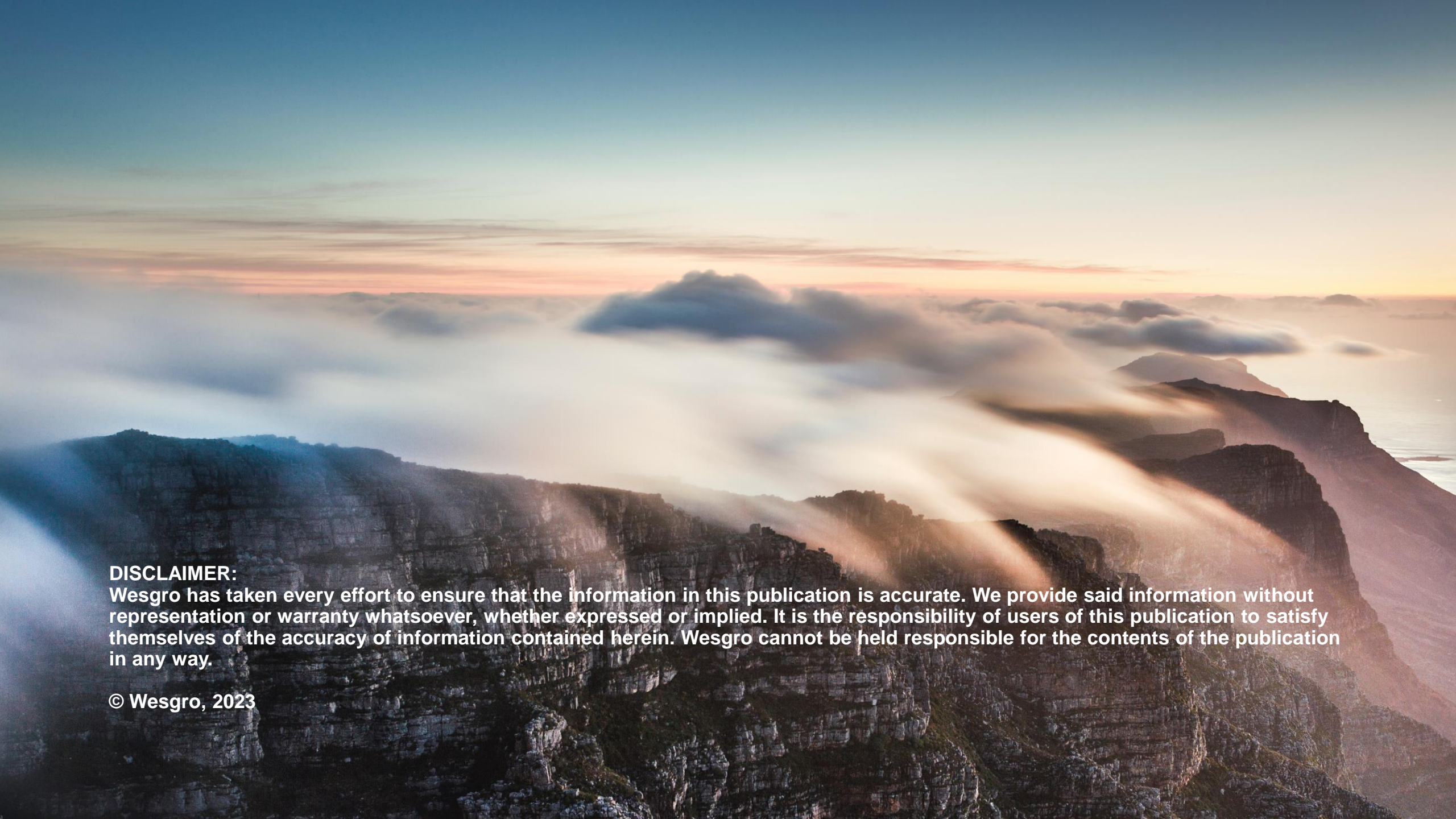
Source: Rove, 2023

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. 		
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 		
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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