

Tourism Research Overview January 2024

Cape Town & the Western Cape

WESGRO

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

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Key Findings

- Passenger growth at Cape Town International Airport (CTIA) continues into the new year, with both the domestic and international passenger terminals recording a positive start to January 2024.
- CTIA's international terminal saw a 13% year-on-year growth in January 2024, with over 316,000 two-way passengers, maintaining a steady influx from the 317,233 two-way passengers recorded in December 2023.
- The domestic terminal recorded a 15% year-on-year growth for January 2024, with over 590 000 two-way passengers passing through the terminal.
- George Airport's passenger numbers show a 9% year-on-year growth in January 2024, with over 69,400 two-way passengers travelling through the airport. This follows an impressive surge seen at the airport during December 2023, which resulted in a 31% year-on-year growth when compared to December 2022.
- Growth in international air arrivals to Cape Town continued into January 2024, with both the overseas and total tourist arrivals remaining at full recovery. Foreign air arrivals in Cape Town surpassed the 100,000 mark in January 2024 and exceeded the January 2019 figure of 96,222. January 2024 international air arrivals to Cape Town were made up of 92% from overseas markets and 8% from the rest of Africa.
- During January 2024, the UK led as the top air market to Cape Town, with Germany a very close second, followed by the USA, the Netherlands and France in the top 5 positions. The new year kicked off with the European market dominating air arrivals to Cape Town in January 2024, with 8 out of the top 10 source markets originating from the continent.
- Tourist arrivals in January 2024 reflected full recovery from 7 out of the top 10 source markets to Cape Town (via air), against January 2019. These markets included the UK (118%), Germany (126%), USA (152%), Netherlands (140%), Canada (102%), Belgium (128%) and Ireland (123%).
- 39 participating attractions across the six regions of the Western Cape recorded a total of 937,067 visitors in January 2024, a 19% growth in the number of visitors when compared to January 2023.
- The top 5 highest year-on-year growth rates in January 2024 were recorded amongst the Western Cape's nature/outdoor attractions which included Stony Point Eco Venue (1510%), Majiesrivier Nature Reserve (862%), Kogelberg Nature Reserve (198%), De Hoop Nature Reserve (138%) and Assegaaibosch Nature Reserve (89%).

Cape Town International Airport (CPT) performance: Jan 2024

Domestic terminal

Year/Month	2019	2020	2021	2022	2023	2023					2024
						Aug	Sept	Oct	Nov	Dec	Jan
Two-way passengers	8 363 307	3 167 542	4 221 365	5 960 826	6 884 252	542 517	601 052	648 797	604 683	688 897	590 562
YoY growth percentage*	2%	-62%	33%	41%	16%	18%	24%	23%	19%	21%	15%

International terminal

Year/Month	2019	2020	2021	2022	2023	2023					2024
						Aug	Sept	Oct	Nov	Dec	Jan
Two-way passengers	2 606 398	810 811	525 441	1 895 975	2 807 431	199 262	200 190	237 356	273 281	317 233	316 481
YoY growth percentage*	1%	-69%	-35%	261%	48%	34%	31%	35%	29%	17%	13%

* Growth compared to the same period in the previous year

Passenger data source: ACSA
Air cargo data source: Accenture

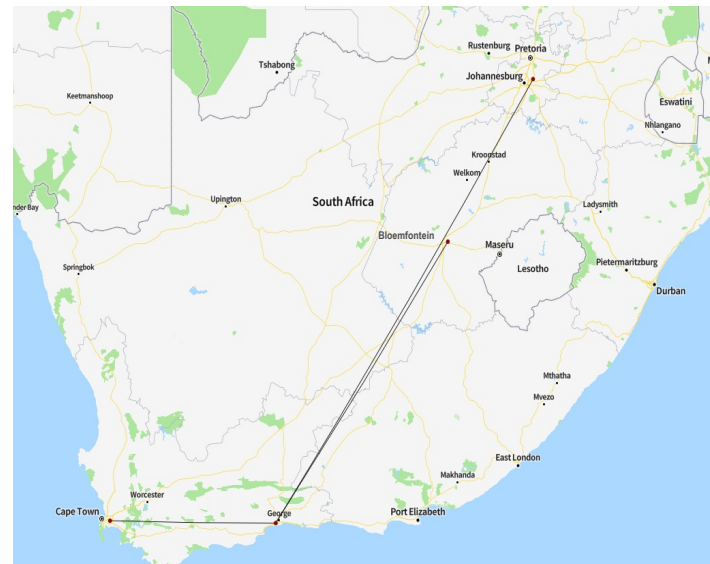
George Airport (GRJ) 2-way passenger performance: Jan 2024

Year/Month	2019	2020	2021	2022	2023	2023					2024
						Aug	Sept	Oct	Nov	Dec	Jan
Two-way passengers	840 804	346 223	539 637	747 848	792 735	62 082	64 428	68 850	63 828	83 710	69 481
YoY growth percentage*	0.5%	-59%	56%	39%	6%	2%	5%	7%	7%	31%	9%

* Growth compared to the same period in the previous year

Data source: ACSA

Operating carriers














Source: OAG Schedules Analyser

CPT International schedule




IATA Winter
2023/24
(Nov – Mar)

25 airlines
30 destinations
36 routes
215 flights per week

Rest of Africa

	Air Botswana	Gaborone (GBE) 3x per week
	Air Mauritius	Mauritius (MRU) 2x week* <i>*3x per week from 01 Dec – 02 April</i>
	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
	Kenya Airways	Nairobi (NBO) 3x week, NBO – Livingstone (LVI) 2x week NBO – Victoria Falls (VFA) 3x week
	Proflight Zambia	Lusaka (LUN) 3x week
	RwandAir	Kigali (KGL) - Harare (HRE) 6x week
	TAAG	Luanda (LAD) Daily
	LAM Mozambique	Maputo (MPM) 3x week




Asia & Middle East

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

Europe

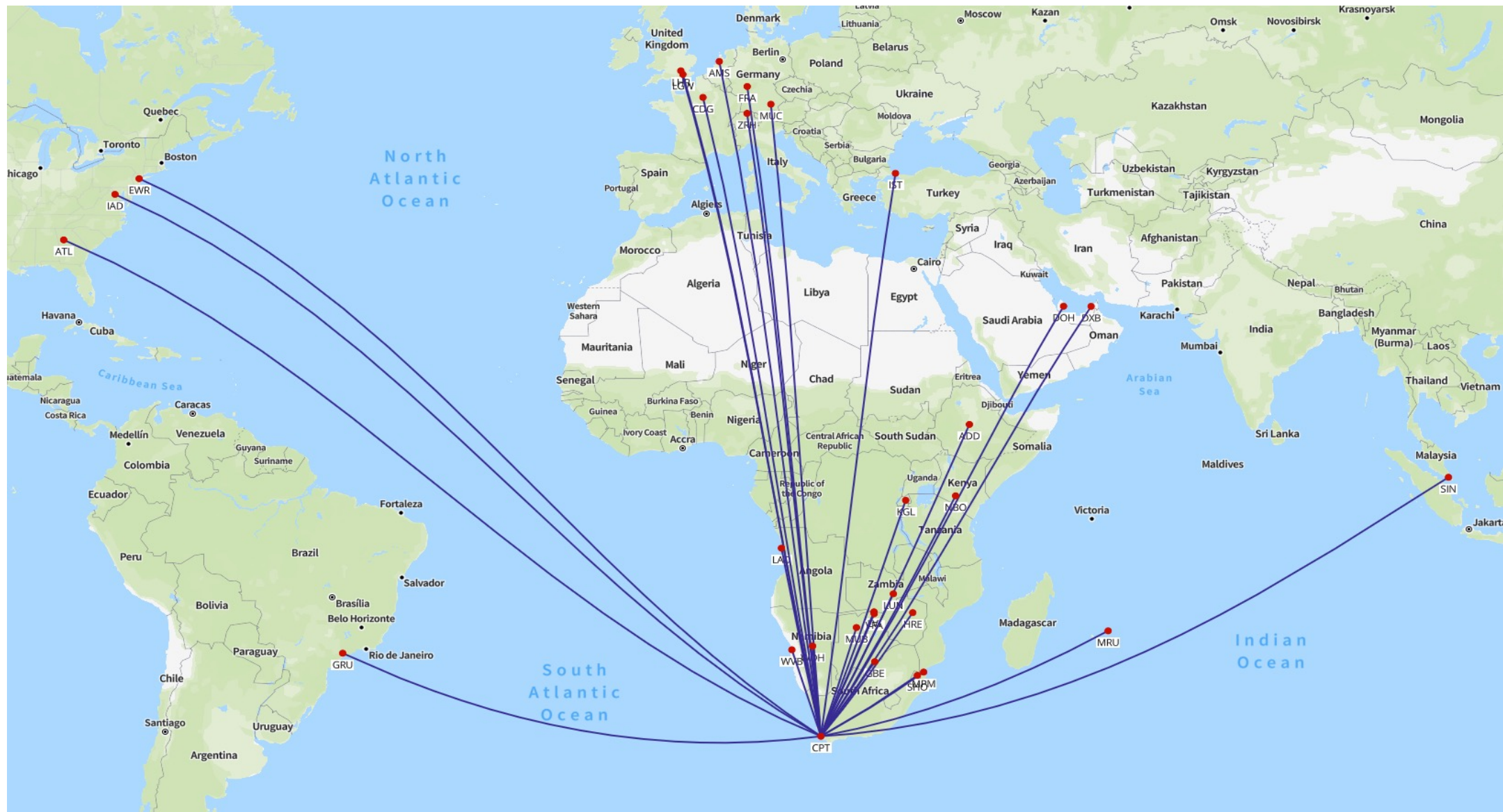
	Air France	Paris (CDG)* 3x per week** <i>*Seasonal</i> <i>**5x per week from 17 Jan – 27 Feb</i>
	British Airways	London Heathrow (LHR) 2x Daily London Gatwick (LGW)* 3x per week <i>*Seasonal</i>
	Condor	Frankfurt (FRA)* 5x per week <i>*Seasonal</i>
	Edelweiss	Zurich (ZRH)* 4x per week <i>*Seasonal</i>
	KLM	Amsterdam (AMS) Daily
	Lufthansa	Frankfurt (FRA) Daily Munich (MUC)* 5x per week <i>*Seasonal</i>
	Turkish Airlines	Istanbul (IST) Daily
	Virgin Atlantic	London Heathrow (LHR)* Daily <i>*Seasonal</i>

North & South America

	Delta Air Lines	Atlanta (ATL) 3x per week Triangular* 4x per week <i>*ATL-JNB-CPT-ATL</i>
	United Airlines	Newark (EWR) 3x per week Washington D.C (IAD) 3x per week
	South African Airways	São Paulo (GRU) 2x per week

Source: Cape Town Air Access, 2024

IATA winter season route network (November 2023 - March 2024)

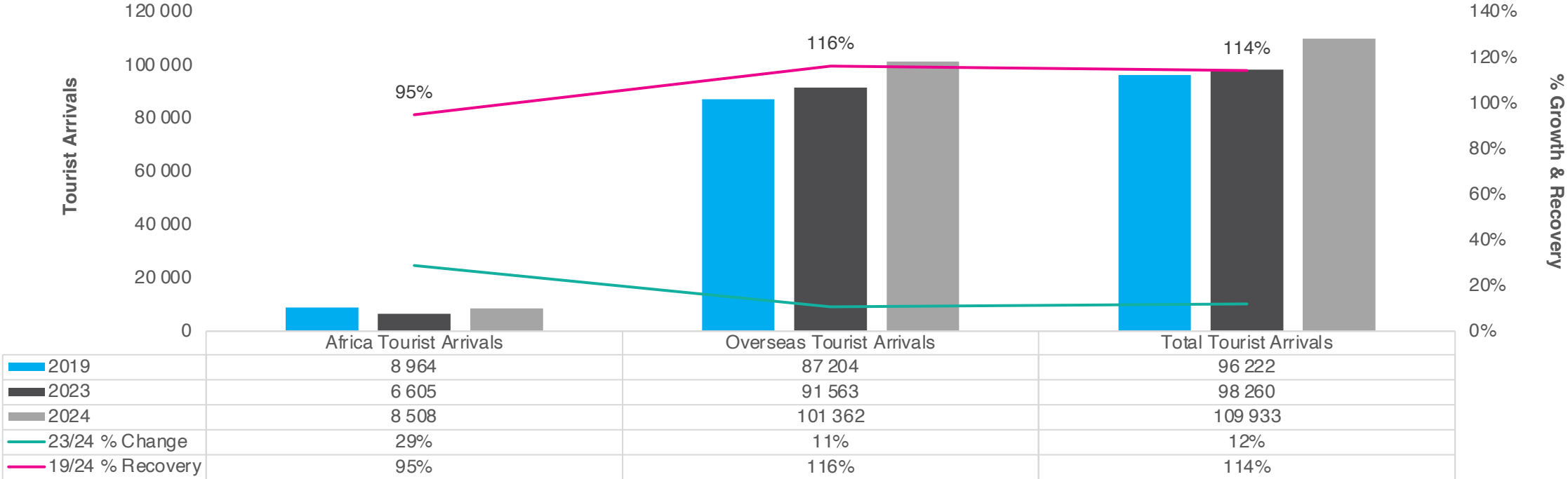


Source: OAG

Performance of Air Arrivals to Cape Town: January 2024

Growth in international air arrivals to Cape Town continued into the new year, with both the overseas and total tourist arrivals remaining at full recovery in January 2024. Arrivals from international markets to Cape Town surpassed the **100,000** mark in January 2024 and exceeded the January 2019 figure of 96,222. January 2024 air arrivals to Cape Town were made up of 92% from overseas markets and 8% from the rest of Africa.

Tourist Arrivals to Cape Town (via air) by Origin, January 2024

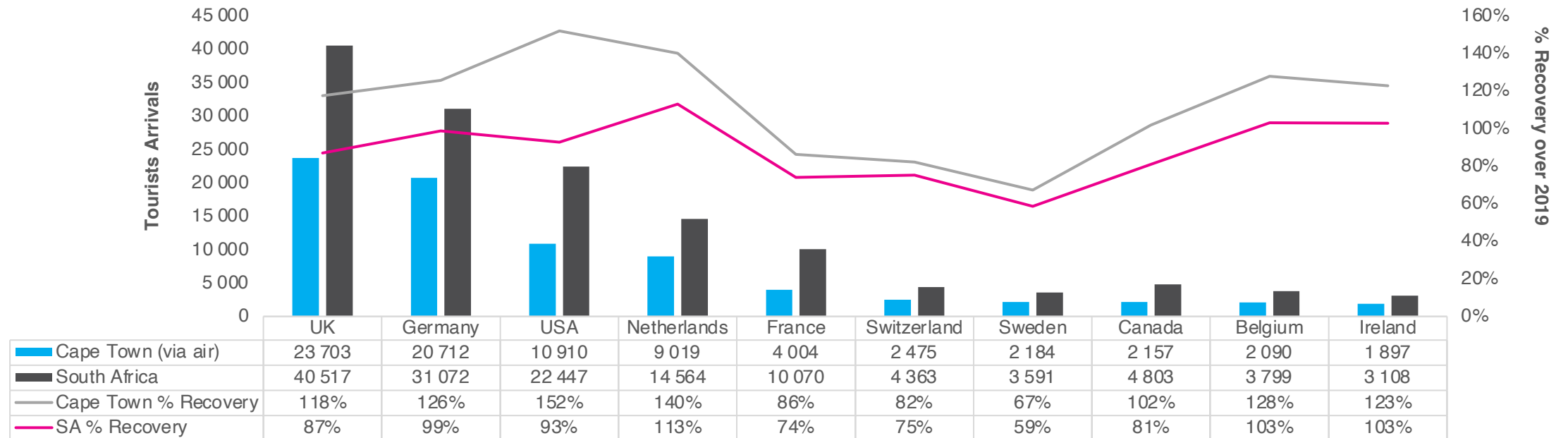


Source: StatsSA, 2024

Top Markets to Cape Town (via air): January 2024

- During January 2024, the UK led as the top air market to Cape Town, with Germany a very close second, followed by USA, Netherlands and France in the top 5 positions. The new year kicked off with the European market dominating air arrivals to Cape Town in January 2024, **with 8 out of the top 10 source markets originating from the continent.**
- Tourist arrivals in January 2024 reflected full recovery from **7 out of the top 10 source markets to Cape Town (via air)**, against January 2019. These markets included the UK (118%), Germany (126%), USA (152%), Netherlands (140%), Canada (102%), Belgium (128%) and Ireland (123%).

Tourist Arrivals to Cape Town (via air) and South Africa, January 2024



Source: StatsSA, 2024

Performance of Western Cape Attractions: January 2024

- 39 participating attractions across the six regions of the Western Cape recorded a total of **937,067** visitors in January 2024, a **19% growth in the number of visitors** when compared to January 2023.
- The top 5 highest year-on-year growth rates in January 2024 were recorded amongst the Western Cape's nature/outdoor attractions:
 - Stony Point Eco Venue (1510%)
 - Majiesrivier Nature Reserve (862%)
 - Kogelberg Nature Reserve (198%)
 - De Hoop Nature Reserve (138%) and
 - Assegaibosch Nature Reserve (89%)

Sources: LTOs and Attractions, 2024

Western Cape Attractions	Jan-23	Jan-24	Jan 23/24 % Change
Cape Town			
Kirstenbosch National Botanical Garden	78 308	73 110	-7%
Table Mountain Aerial Cableway	106 886	122 373	14%
Table Mountain National Park	284 554	342 100	20%
Table Mountain National Park: Boulders	69 316	88 867	28%
Table Mountain National Park: Cape of Good Hope	91 034	105 479	16%
Robben Island	28 620	34 157	19%
Overberg			
Agulhas National Park	4 162	3 105	-25%
Bontebok National Park	1 546	1 664	8%
Harold Porter National Botanical Garden	6 254	6 941	11%
Grootvadersbosch Nature Reserve	625	829	33%
Marloth Nature Reserve	881	979	11%
The Whale Trail	330	296	-10%
Walker Bay Nature Reserve	3 268	5 610	72%
Stony Point Eco Venue	10	161	1510%
De Hoop Nature Reserve	1 278	3 046	138%
Kogelberg Nature Reserve	788	2 345	198%
Garden Route & Klein Karoo			
Tsitsikamma National Park	28 736	40 805	42%
Wilderness National Park	14 245	18 222	28%
Knysna National Park	4 482	5 146	15%
Goukamma Nature Reserve	523	225	-57%
Keurbooms River Nature Reserve	13 139	16 131	23%
Robberg Nature Reserve	11 474	14 728	28%
Weskus			
West Coast National Park	22 309	27 771	24%
!Khwatla	1 939	1 953	1%
Bird Island Nature Reserve	1 341	1 543	15%
Cederberg-Algeria Nature Reserve	1 173	1 979	69%
Cederberg-Kliphuis Nature Reserve	166	148	-11%
Groot Winterhoek Wilderness Area	386	614	59%
Matjiesrivier Nature Reserve	282	2 713	862%
Rocherpan Nature Reserve	189	187	-1%
Winelands			
Protea Tractor Trip	347	422	22%
Birds Paradise	926	802	-13%
Viljoensdrift River Cruise	1 329	2 318	74%
Assegaibosch Nature Reserve	304	576	89%
Hottentots Holland Nature Reserve	402	608	51%
Limietberg Nature Reserve	4 710	6 027	28%
Vrolijkheid Nature Reserve	400	526	32%
Cape Karoo			
Karoo National Park	2742	2497	-9%
Anysberg Nature Reserve	42	64	52%
Total	789 446	937 067	19%

Visitor Trends Mobile Location Data Insights

January 2024

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Western Cape Mobile Location Data Insights

What is mobile location data?

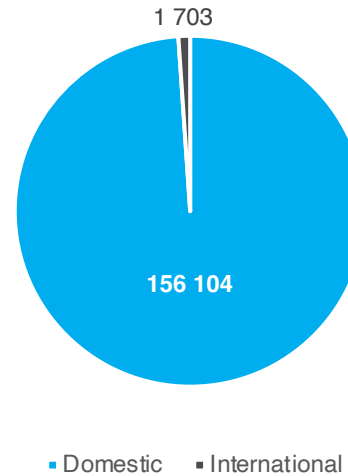
- Geo or spatial data from smartphones. When a user installs an app, they are often asked to share their location data with the company which provides the app, and other companies who are partners with the app publisher.
- Users can “opt in” to location sharing (or choose not to “opt in”). When they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

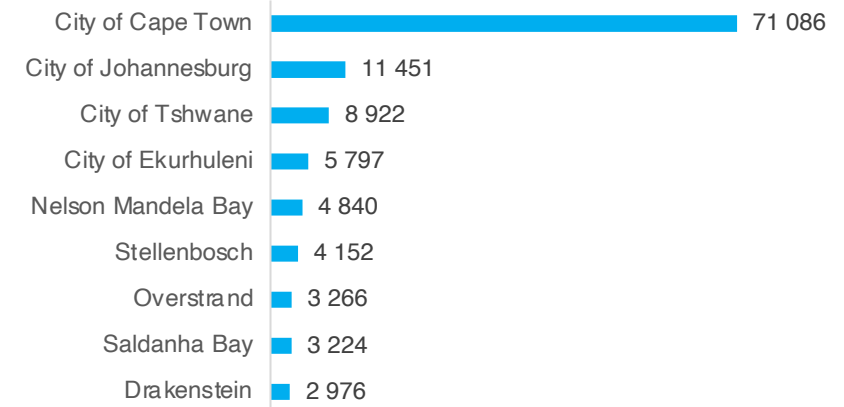
- Mobile location-based data offers a more granular lens on visitor behaviour and provides a much larger sample size.
- These insights aim to facilitate a better understanding of visitor movement throughout the Western Cape’s six region.
- Mobile location data serves as a sample. It is not 100% of visitors, 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 **156,104 domestic** and **1,703 international** tourists who visited the Western Cape in January 2024. Within the domestic data set, **71,086** of the sampled tourists were from Cape Town, and of the international sampled tourists, **448** were from the United States.

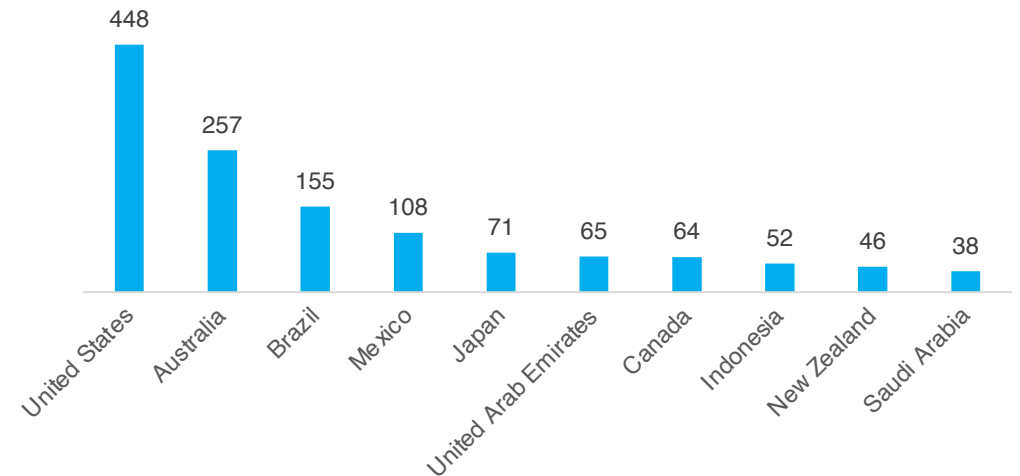
Sample Size, Jan. 2024



Domestic Origin Municipality, Jan. 2024



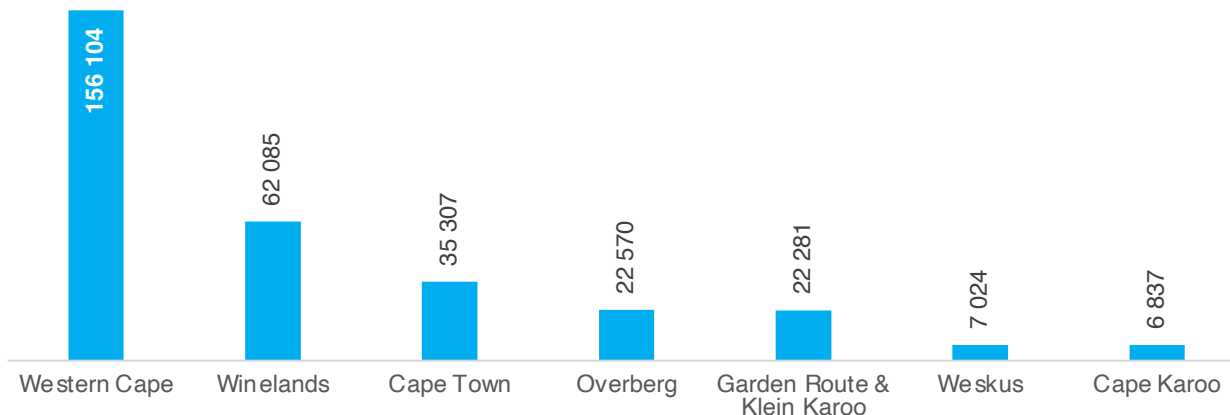
International Origin Country, Jan. 2024



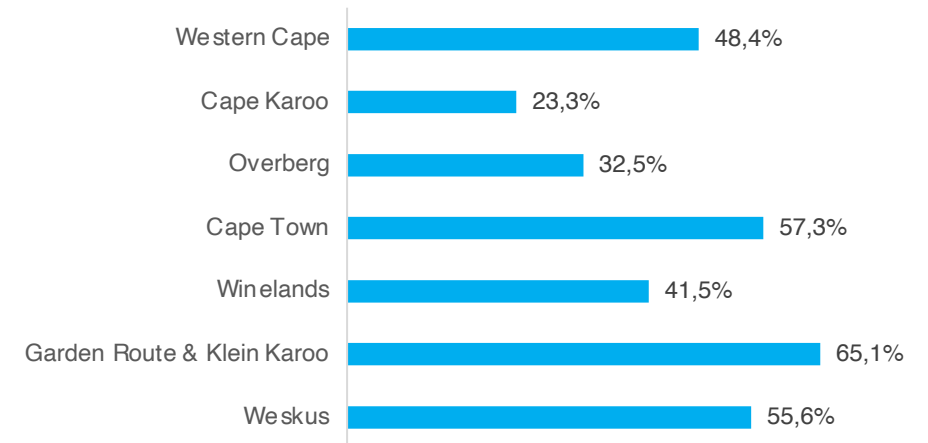
Mobile Insights: Domestic Visitor Trends

- According to the latest available mobile data insights, in the month of January 2024, the Western Cape province saw a significant influx of repeat tourists, with an average of 48.4% of visitors returning for another visit.
- Among the top destinations within the province, the Winelands and Cape Town stood out as the most popular destinations for domestic tourists in terms of the volume of samples collected, with 39.8% and 22.6% of visitors respectively. Meanwhile, the Cape Karoo region had the least sample size of tourists, with only 4.4% of visitors recorded during January 2024.
- Further analysis of the mobile data insights reveals that domestic tourists tended to favor certain regions for repeat visits during the January 2024 period. Garden Route & Klein Karoo emerged as the most popular region for domestic repeat visits, with 65.1% of visitors choosing to return to the region during this time.
- Cape Town proved to be the second most popular destination for repeat visits, with 57.3% of tourists choosing to return. The Weskus (55.6%) and Winelands (41.5%) regions also proved to be popular among domestic tourists for repeat visits during January 2024.

Domestic Sample Size, Jan. 2024



Domestic Repeat Visitors, Jan. 2024

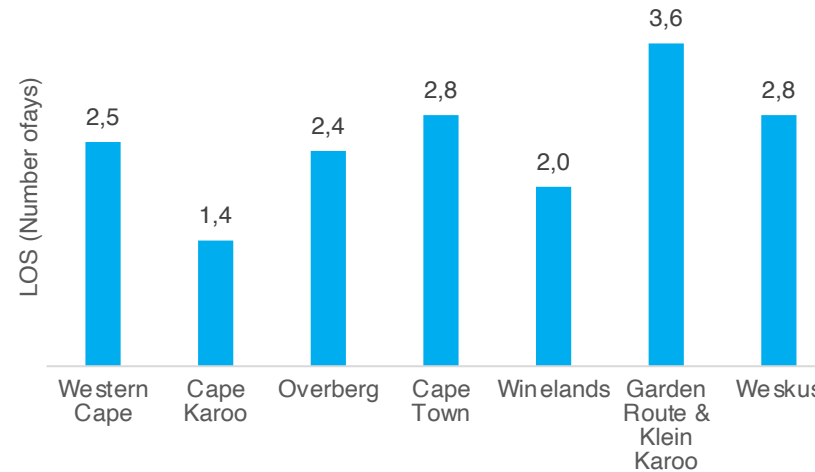


Source: Rove, 2024

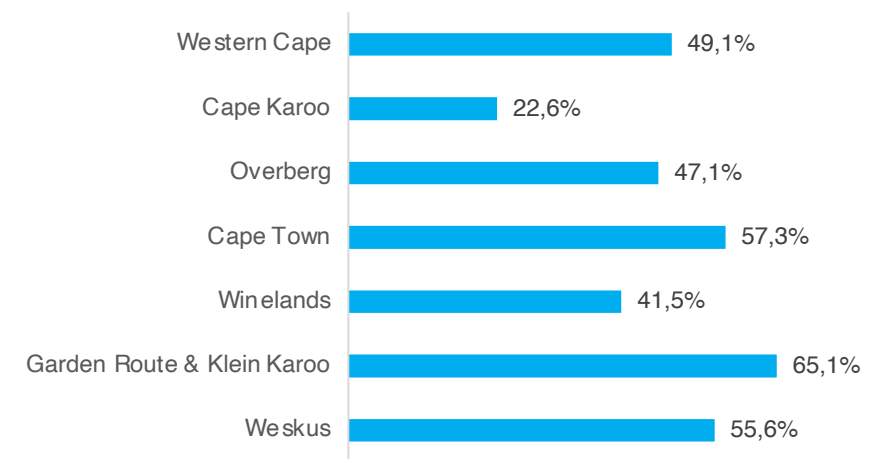
Mobile Insights: Domestic Visitor Trends

- According to the latest mobile data insights, it has been observed that domestic tourists who visit the Western Cape tend to spend the longest time in some of the most popular tourist destinations. The top five destinations where the average tourist stay duration is maximum are the Garden Route & Klein Karoo (3.6 days), Cape Town (2.8 days), Weskus (2.8 days), Overberg (2.4 days), and Winelands (2.0 days).
- Interestingly, the mobile data insights also reveal that more than 60% of sampled tourists prefer to stay overnight in the Garden Route & Klein Karoo, while over 50% choose Cape Town and Weskus as their preferred destinations for overnight stay.
- On the other hand, the mobile data insights also show that only 73.1% of domestic tourists tend to visit Cape Karoo for just one day.

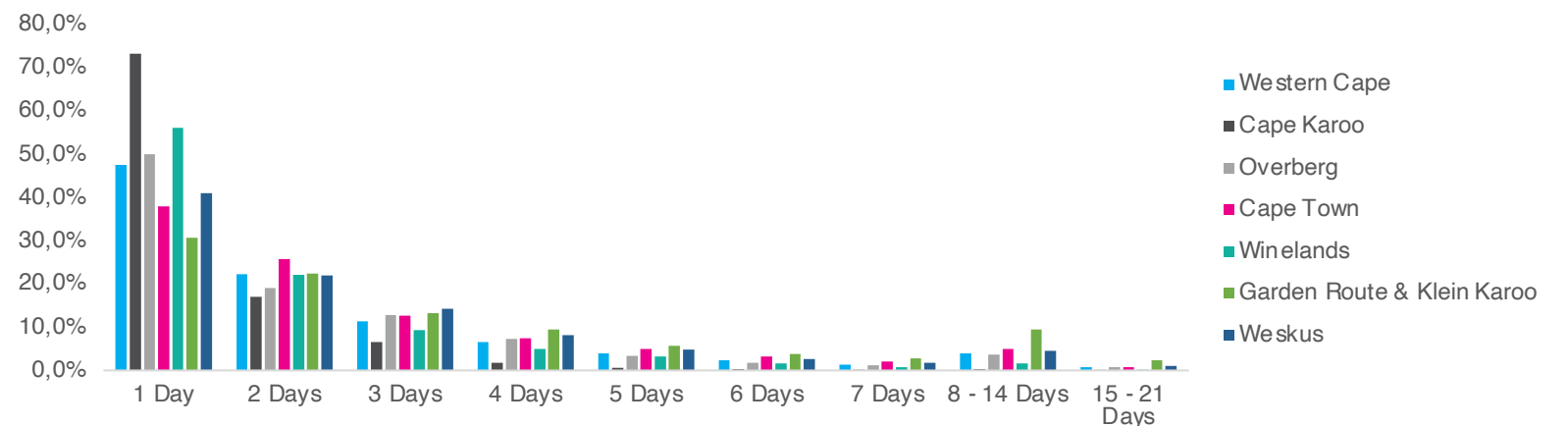
Average Length of Stay (LOS), Jan. 2024



% Overnight Stays, Jan. 2024



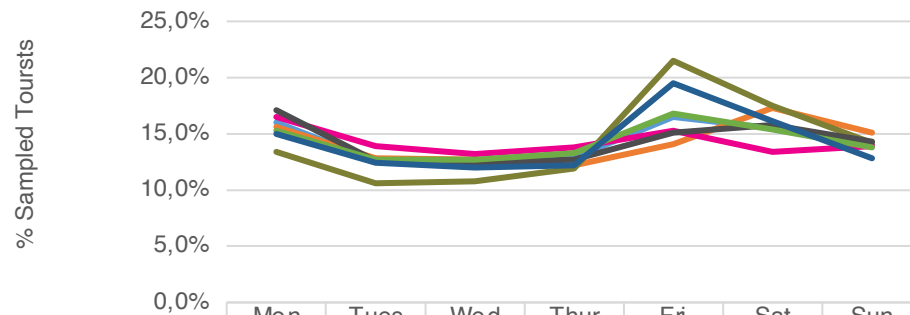
Average Length of Stay (Number of Days): Domestic, Jan. 2024



Mobile Insights: Domestic Visitor Trends

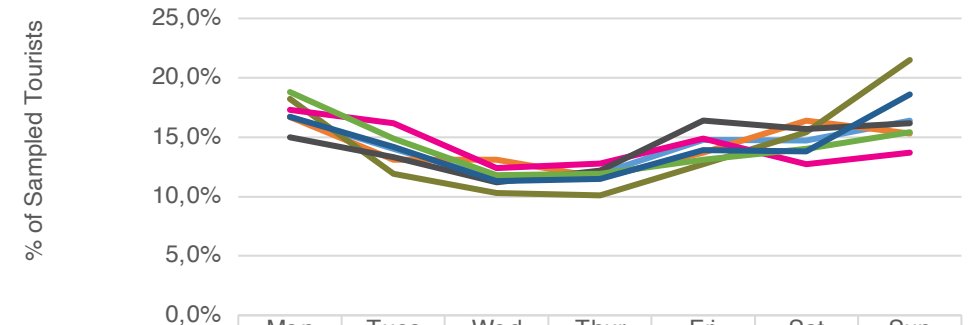
- Based on the insights gathered from mobile data, it has been observed that the Western Cape province is a popular destination for domestic tourists. Upon analysing the data, it was found that tourists arriving in the province usually do so on either a Monday or a Friday, with most of them departing on a Sunday or Monday.
- Interestingly, the findings revealed different trends in terms of the day of arrival and departure among visitors to various parts of the province. For instance, tourists heading to the Cape Karoo region mostly arrived on a Saturday and left on a Monday. In the Overberg region, tourists mostly arrived on a Friday and departed on a Sunday.
- Tourists visiting Cape Town, on the other hand, arrived and departed from the city on Monday. Conversely, tourists to the Winelands arrived on a Monday and departed on either Friday or Sunday. Tourists to the Garden Route and Klein Karoo regions mostly arrived on a Friday and departed on a Monday. Lastly, tourists to Weskus mostly arrived on a Friday and departed on a Sunday.

Popular Arrival Days of the Week: Domestic, Jan. 2024



	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Western Cape	16,0%	12,6%	12,4%	12,9%	16,5%	15,5%	14,1%
Cape Karoo	15,6%	12,8%	12,7%	12,2%	14,1%	17,3%	15,1%
Overberg	13,4%	10,6%	10,8%	11,9%	21,5%	17,5%	14,2%
Cape Town	16,5%	13,9%	13,2%	13,8%	15,3%	13,4%	13,9%
Winelands	17,1%	12,6%	12,4%	12,7%	15,1%	15,8%	14,3%
Garden Route & Klein Karoo	15,3%	12,7%	12,7%	13,3%	16,8%	15,4%	13,8%
Weskus	15,0%	12,4%	12,0%	12,2%	19,5%	16,1%	12,8%

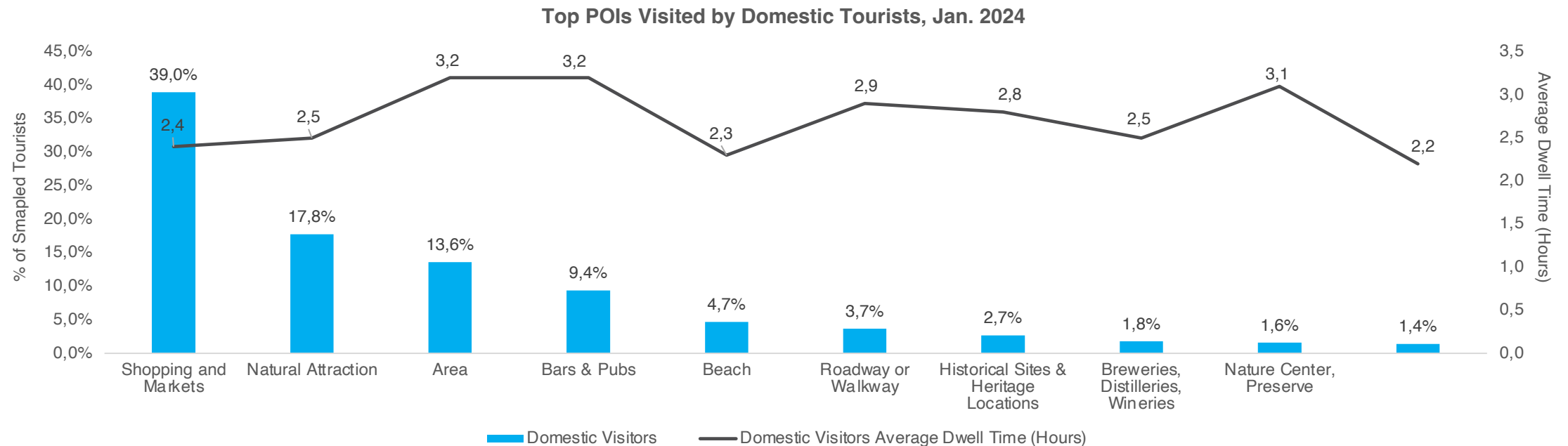
Popular Departure Days of the Week: Domestic, Jan. 2024



	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Western Cape	16,7%	14,0%	11,5%	11,9%	14,8%	14,7%	16,4%
Cape Karoo	16,7%	13,1%	13,1%	11,6%	13,7%	16,4%	15,3%
Overberg	18,2%	11,9%	10,3%	10,1%	12,7%	15,4%	21,5%
Cape Town	17,3%	16,2%	12,4%	12,8%	14,9%	12,7%	13,7%
Winelands	15,0%	13,3%	11,2%	12,2%	16,4%	15,7%	16,2%
Garden Route & Klein Karoo	18,8%	14,9%	11,8%	11,9%	13,1%	14,0%	15,4%
Weskus	16,7%	14,2%	11,3%	11,5%	13,9%	13,8%	18,6%

Points of Interest (POIs) Visited: Domestic Tourists

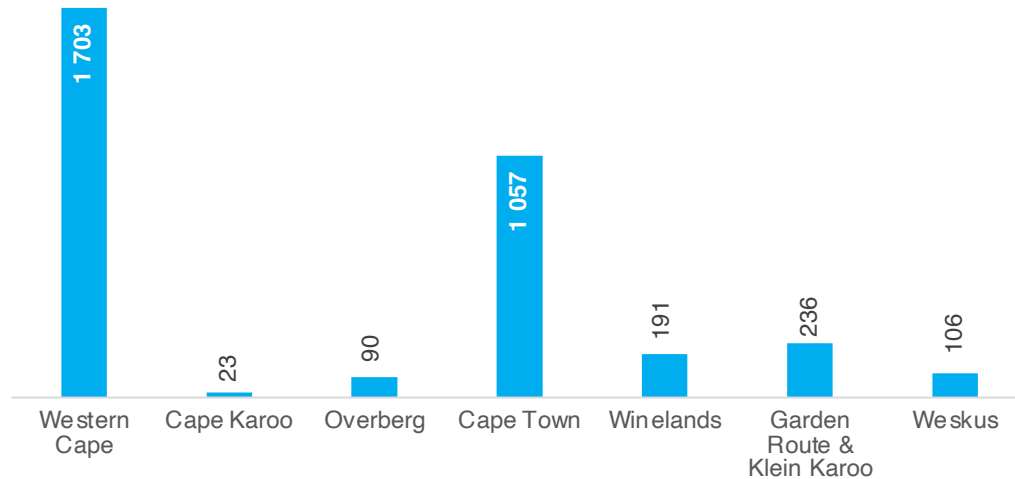
- **Shopping and markets** were the most popular type of attraction visited by domestic tourists with an average dwell time of **2.4 hours**.
- **Natural attractions** ranked as the 2nd most popular point of interest among domestic tourists with an average dwell time of **2.5 hours**.
- **Spending time in areas** like Cederberg Wilderness, Stanford Valley, Hemel-en-Aarde Valley and Van Dyk's Bay ranked 3rd amongst the top POIs visited by domestic tourists, with an average dwell time of **3.2 hours**.
- **Bars and pubs** were the 4th most popular point of interest and domestic tourists spent an average of **3.2 hours** at the location.
- **Spending time at the beach** ranked the 5th most popular point of interest among domestic tourists, with an average dwell time of **2.3 hours**.



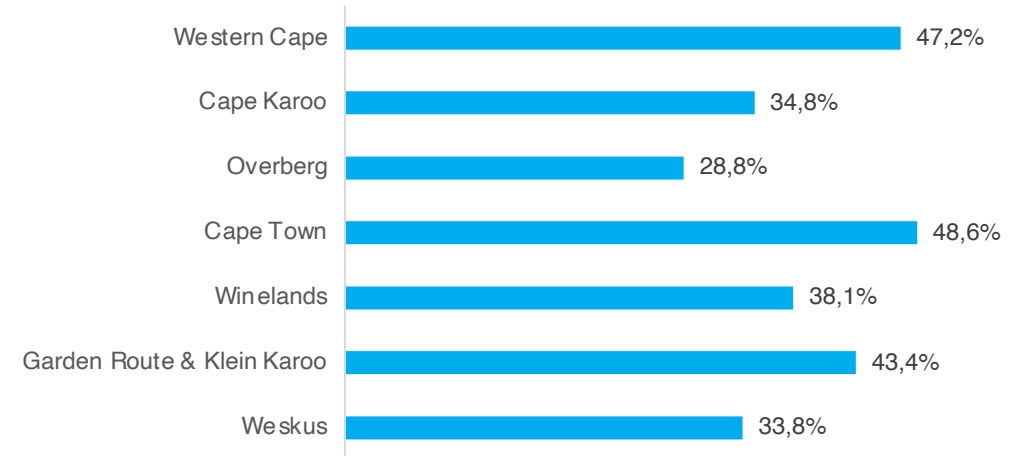
Mobile Insights: International Visitor Trends

- According to the mobile data insights on the sample size of international tourists, it was found that the majority of tourists, that is, 62.1%, visited Cape Town.
- The second most visited destination was the Garden Route & Klein Karoo, with 13.9% of the tourists exploring this region, followed by the Winelands, which was visited by 11.2% of the tourists. However, it is important to note that the sample size for the Cape Karoo was only 1.4% international tourists, which is not statistically representative of the visitor trends for this region.
- Moving on to the international repeat visitors, the mobile data insights found that Cape Town was the most popular destination, with 48.6% of the repeat visitors choosing to return to this city. Garden Route & Klein Karoo, Winelands, and Weskus were also popular among visitors, with 43.4%, 38.1% and 33.8% of tourists revisiting these regions respectively in January 2024.

International Sample Size, Jan. 2024



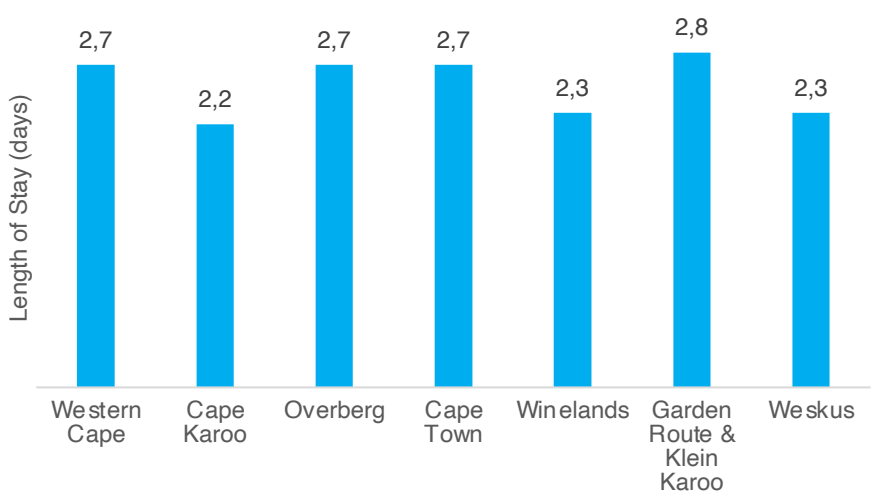
International Tourists Repeat Visits, Jan. 2024



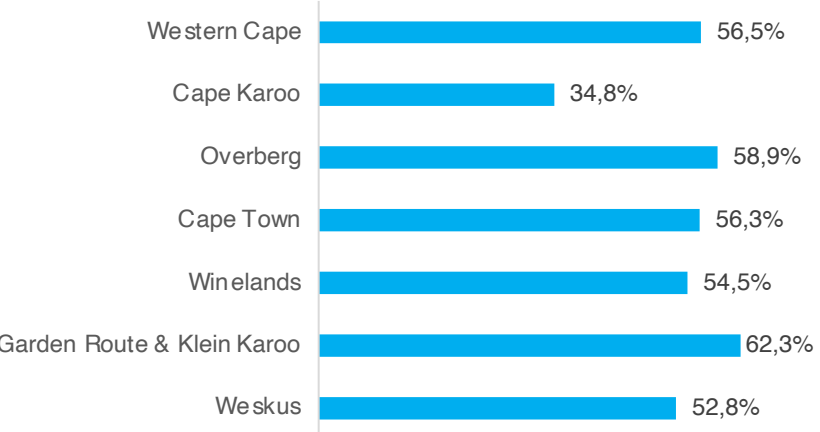
Mobile Insights: International Visitor Trends

- According to the mobile data insights, all the Western Cape regions were popular destinations amongst international tourists. With an average length of 2.8 days at the Garden Route & Klein Karoo and 2.7 days at the Cape Town, Overberg, 2.3 days at Weskus and Winelands, and 2.2 days at Cape Karoo.
- The Garden Route & Klein Karoo region was the preferred choice for overnight stays among tourists, with just over 60% of them choosing to stay there. The Overberg region was the second most popular choice for tourists, with 58.9% of them staying overnight. Half of the tourists opted to stay in Weskus, Winelands, and Cape Town.
- The majority of tourists, who visited the province and its regions, stayed for 1-2 days. This information can help tourism officials understand how long international tourists tend to stay in the Western Cape and which regions they prefer to visit.
- It's worth noting that the overnight stay is defined as tourists who arrive before midnight and stay until 07:00 the following day.

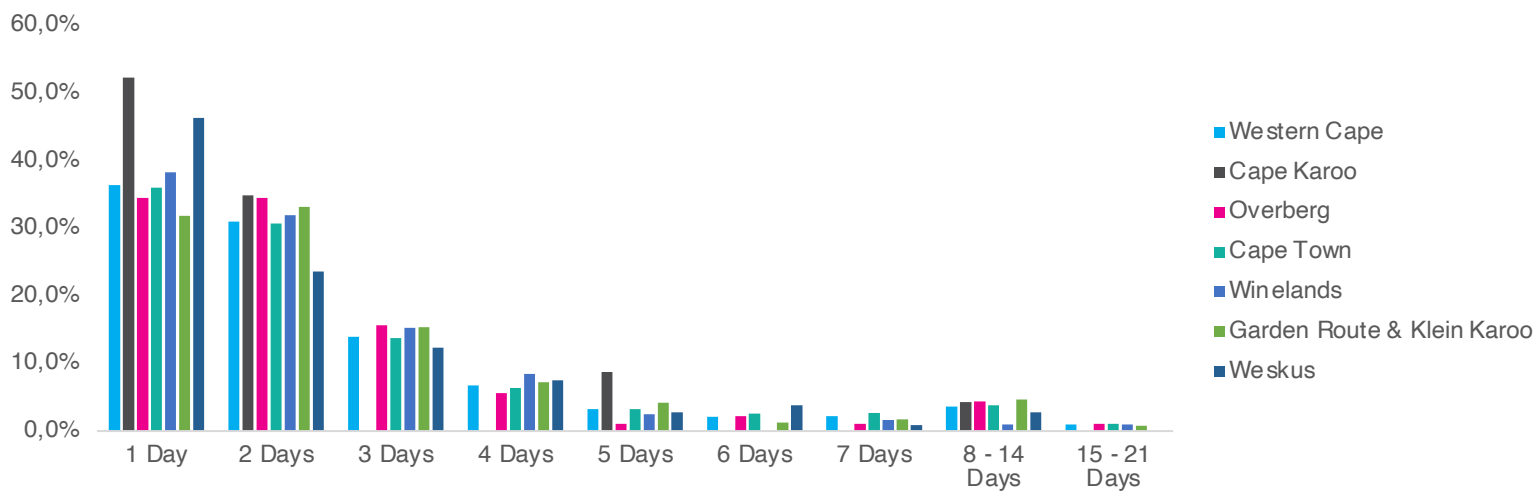
Average Length of Stay (LOS), Jan. 2024



% Overnight Stays, Jan. 2024



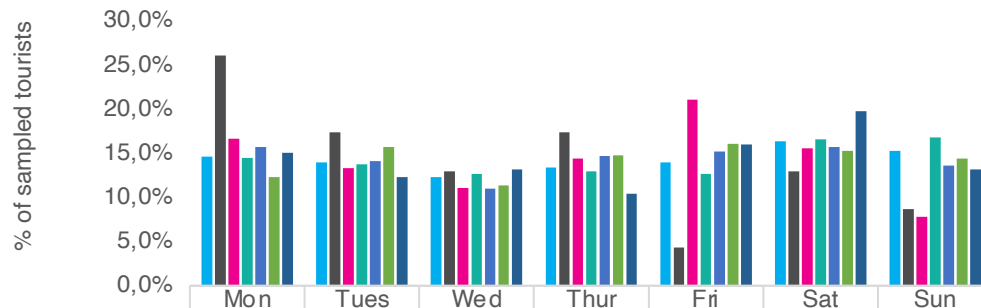
Average Length of Stay (Number of Days): International, Jan. 2024



Mobile Insights: International Visitor Trends

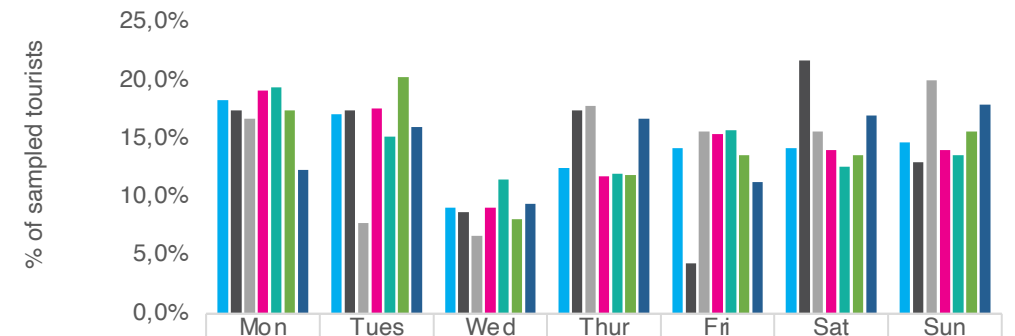
- As per the recent findings on international visitor trends to the Western Cape in January 2024, it has been observed that tourists mostly arrived over the weekends, i.e., between Saturday and Sunday, and left on either Monday or Tuesday.
- During this period, a group of 23 tourists visited the Cape Karoo region from Monday to Saturday. Further the findings indicated that the most popular arrival days for tourists in Cape Town were Friday and Saturday, while Monday and Tuesday were the preferred departure days.
- As for tourists who visited the Winelands region, it was observed that they mostly arrived on Monday or Saturday and departed from the region on a Monday. Moving on to the Garden Route & Klein Karoo region, it was found that visitors arrived on Friday and left on Tuesday. In the Weskus region, Saturday emerged as the most popular arrival day and Sunday as the day of departure. Finally, for tourists to the Overberg region, Friday was the most popular arrival day, and Sunday was the day of departure.

Popular Arrival Days of the Week: International, Jan. 2024



	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Western Cape	14,6%	14,0%	12,3%	13,4%	14,0%	16,4%	15,3%
Cape Karoo	26,1%	17,4%	13,0%	17,4%	4,3%	13,0%	8,7%
Overberg	16,7%	13,3%	11,1%	14,4%	21,1%	15,6%	7,8%
Cape Town	14,5%	13,8%	12,7%	13,0%	12,7%	16,6%	16,8%
Winelands	15,7%	14,1%	11,0%	14,7%	15,2%	15,7%	13,6%
Garden Route & Klein Karoo	12,3%	15,7%	11,4%	14,8%	16,1%	15,3%	14,4%
Weskus	15,1%	12,3%	13,2%	10,4%	16,0%	19,8%	13,2%

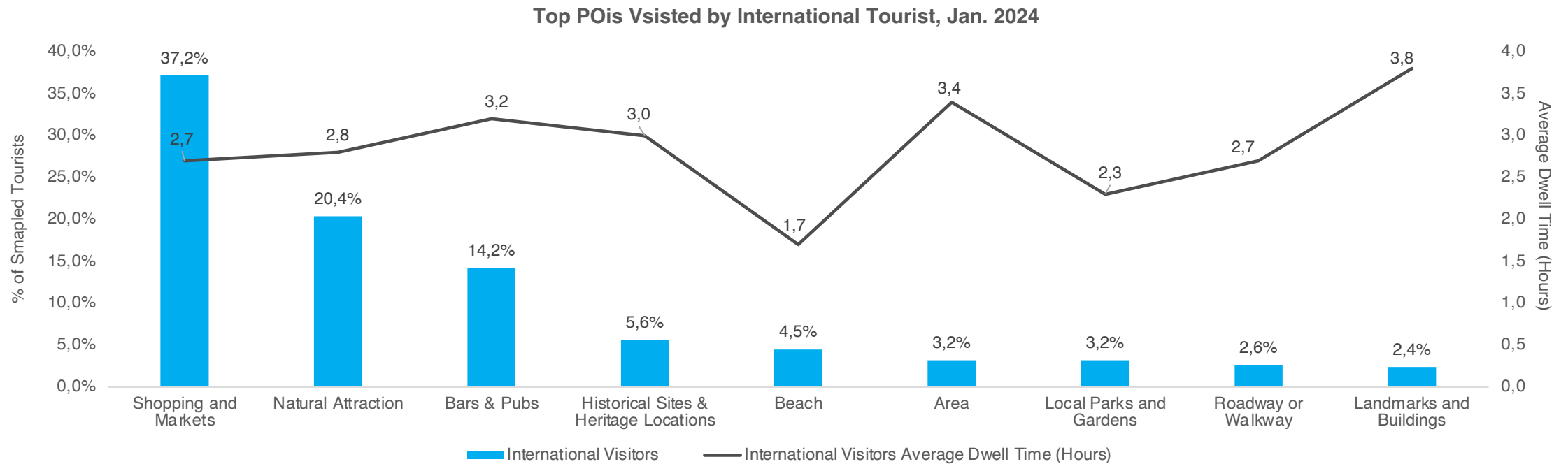
Popular Departure Days of the Week: International, Jan. 2024



	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Western Cape	18,3%	17,1%	9,1%	12,5%	14,2%	14,2%	14,7%
Cape Karoo	17,4%	17,4%	8,7%	17,4%	4,3%	21,7%	13,0%
Overberg	16,7%	7,8%	6,7%	17,8%	15,6%	15,6%	20,0%
Cape Town	19,1%	17,6%	9,1%	11,8%	15,4%	14,0%	14,0%
Winelands	19,4%	15,2%	11,5%	12,0%	15,7%	12,6%	13,6%
Garden Route & Klein Karoo	17,4%	20,3%	8,1%	11,9%	13,6%	13,6%	15,6%
Weskus	12,3%	16,0%	9,4%	16,7%	11,3%	17,0%	17,9%

Points of Interest (POIs) Visited: International Tourists

- **Shopping and markets** were the most popular type of attraction visited by international tourists with an average dwell time of **2.7 hours**.
- **Natural attractions** ranked as the 2nd most popular point of interest among international tourists, with an average dwell time of **2.8 hours**.
- **Bars and pubs** were the 3rd most popular point of interest for international tourists spent an average of **3.2 hours** at the location.
- **Historical sites and heritage locations** ranked the 4th most popular point of interest among international tourists, with an average dwell time of **3.0 hours**.
- **Spending time at the beach** ranked 5th amongst the top POIs visited by international tourists, with an average dwell time of **1.7 hours**.



Definitions of Mobile Location Data and Tourists vs non-Tourists

- About Mobile Location Data

- Privacy compliant data is collected from location-enabled apps on mobile devices. Data is collected when those location-enabled mobile devices enter our geo-fenced areas.
- Data is collected through applications (news, weather, games, texting apps, traffic, etc).
 - Year-over-year numbers could be skewed by increased app penetration and data privacy settings/policies.
 - The exception is 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
- This 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?

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

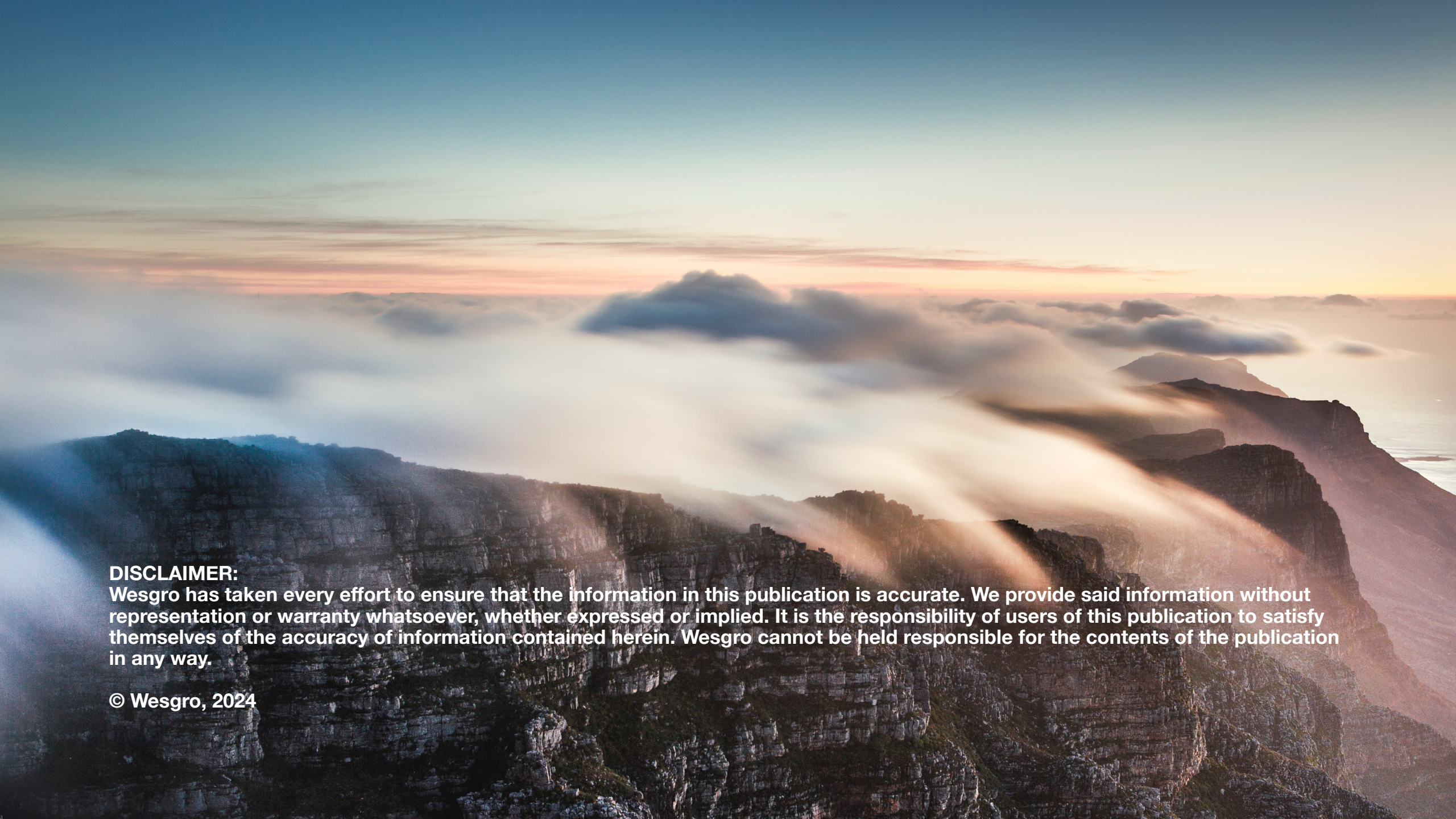
Source: Rove, 2024

Definitions of Mobile Location Data and Tourists vs non-Tourists

Primary Study Geography		Tourists are defined as:
Province/Tourism Regions	When a visitor does not live or work in Cape Town, Winelands, Cape Overberg, Weskus, Garden Route & Klein Karoo and Cape Karoo and they have travelled 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 travelled to meet the definition of tourist. Distance travelled is calculated from the visitors' Common Evening Location (latitude and longitude) to the centre 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 travelled 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 tourists to the city Minimum distance traveled of 40km satisfies tourist definition for minimum distance travelled. Distance travelled is calculated from the visitors' Common Evening Location (latitude and longitude) to the centre 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.). 		
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 the 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 visitorship 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 to Friday, 8am to 6pm local 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 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 devices which are determined NOT to 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 characterises 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 who arrived prior to midnight (0:00) and stayed until 07:00 the following day.
Day Trippers	Term which characterises 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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