



Tourism Research Overview November 2023

Cape Town & the Western Cape

WESGRO

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

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Key Findings

Growth and recovery in the Western Cape remains steady as the tourism sector gears up for the summer season. Highlights of the tourism performance in Nov 2023 YTD are outlined below:

- Two-way passengers through the CTIA **international terminal** remained steady between Jan and Nov 2023, reaching 2.4 million passengers YTD, exceeding pre-pandemic levels and growing by 53% vs. Jan – Nov 2022. *(Data Source: ACSA, 2023)*
- International route highlights include CTIA's newest route: LAM Mozambique Airlines which commenced operations between Maputo and Cape Town on the 12th December 2023, operating three flights a week. *(Data Source: Cape Town Air Access, 2023)*
- On the domestic front, 6.1 million two-way passengers passed through the CTIA **domestic terminal** between Jan and Nov 2023 YTD, increasing by 15% when compared to Jan – Nov 2022. *(Data Source: ACSA, 2023)*
- Two-way passengers through **George Airport** reached 709,025 between Jan and Nov 2023, representing a 4% year-on-year increase vs. Jan - Nov 2022. *(Data Source: ACSA, 2023)*
- Between January and November 2023, **Cape Town recorded a total of 801,498 tourist arrivals via air**, of which 89% originated from overseas markets and 11% from the African continent. Both the overseas and Africa air markets to Cape Town stand at full recovery in November 2023 YTD vs. Jan – Nov 2019. *(Data Source: StatsSA, 2023)*
- By source market, the **UK led as the top air market to Cape Town**, with the USA a very close second, followed by Germany, Netherlands and France in the top 5 positions. The European market remains the largest contributor to air 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 tourists between January and November 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 - Nov). These markets included the UK (104%), USA (145%), Germany (101%), Netherlands (112%), Italy (111%), India (105%), Canada (105%) and Zimbabwe (186%). *(Data Source: StatsSA, 2023)*
- 34 participating attractions across the six regions of the Western Cape recorded a total of 425,326 visitors in November 2023, a **28% growth** in the number of visitors when compared to November 2022. *(Data Source: Local Tourism Offices (LTOs) & Attractions, 2023)*
- **The top 5 highest year-on-year growth rates** in November 2023 were recorded for Goukamma Nature Reserve (968%), Walker Bay Nature Reserve (141%), Anysberg Nature Reserve (129%), De Hoop Nature Reserve (123%) and Stony Point Eco Venue (100%). *(Data Source: Local Tourism Offices (LTOs) & Attractions, 2023)*

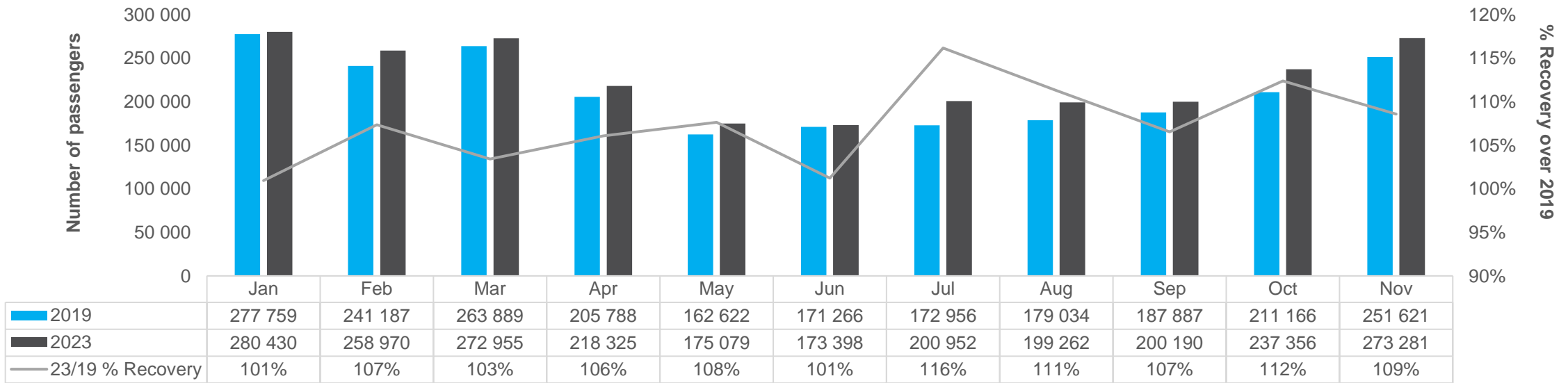
International two-way passengers at CTIA reached 2.4 million between Jan and Nov 2023 and grew by 53% year-on-year

Year/Month	2019	2020	2021	2022	2023 ytd	2023					
						Jun	Jul	Aug	Sept	Oct	Nov
Two-way passengers	2 606 398	810 811	525 441	1 895 975	2 490 198	173 398	200 952	199 262	200 190	237 356	273 281
YoY growth percentage*	1%	-69%	-35%	261%	53%	39%	34%	34%	31%	35%	29%

* Growth compared to the same period in the previous year

Source: ACSA, 2023

International two-way passenger recovery, Jan-Nov 2019/2023



Source: ACSA, 2023

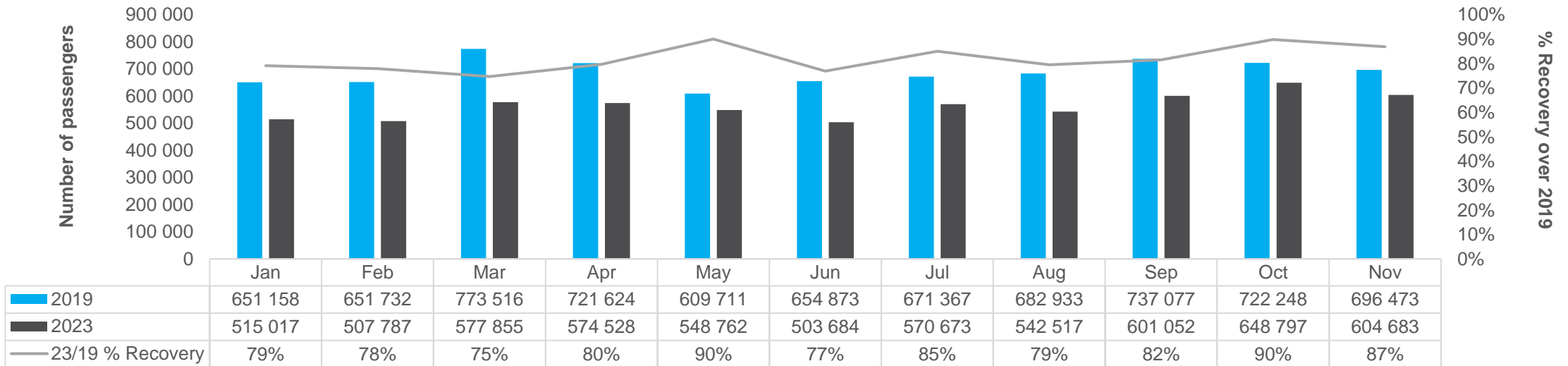
Domestic two-way passengers at CTIA reached 6.1 million between Jan and Nov 2023 and grew by 15% year-on-year

Year/Month	2019	2020	2021	2022	2023 ytd	2023					
						Jun	Jul	Aug	Sept	Oct	Nov
Two-way passengers	8 363 307	3 167 542	4 221 365	5 960 826	6 195 355	503 684	570 673	542 517	601 052	648 797	604 683
YoY growth percentage*	2%	-62%	33%	41%	15%	24%	25%	18%	24%	23%	19%

* Growth compared to the same period in the previous year

Source: ACSA, 2023

Domestic two-way passenger recovery, Jan-Nov 2019/2023



Source: ACSA, 2023

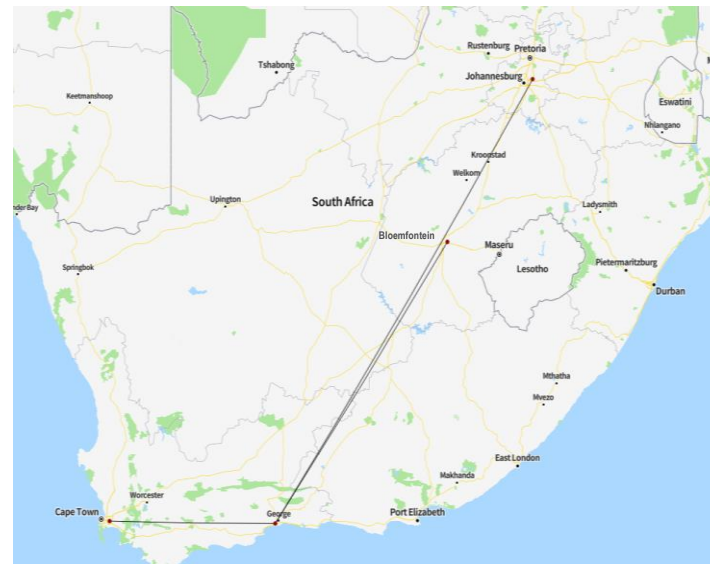
George Airport's two-way passengers reached 709,025 between Jan and Nov 2023 YTD, a 4% increase vs. Jan - Nov 2022

Year/Month	2019	2020	2021	2022	2023 ytd	2023					
						Jun	Jul	Aug	Sept	Oct	Nov
Two-way passengers	840 804	346 223	539 637	747 848	709 025	58 312	64 346	62 082	64 428	68 850	63 828
YoY growth percentage*	0%	-59%	56%	39%	4%	4%	2%	2%	5%	7%	7%

* Growth compared to the same period in the previous year

Source: ACSA, 2023

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) 3x 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
	Kenya Airways	Nairobi (NBO) 3x week, NBO – Livingstone (LVI) 2x week NBO – Victoria Falls (VFA) 3x week
	Proflight Zambia	Lusaka (LUN) 2x week
	RwandAir	Kigali (KGL) - Harare (HRE) 6x week
	TAAG	Luanda (LAD) Daily
	LAM Mozambique	Maputo (MPM) 3x week <i>*Starting 12 December 2023</i>




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>

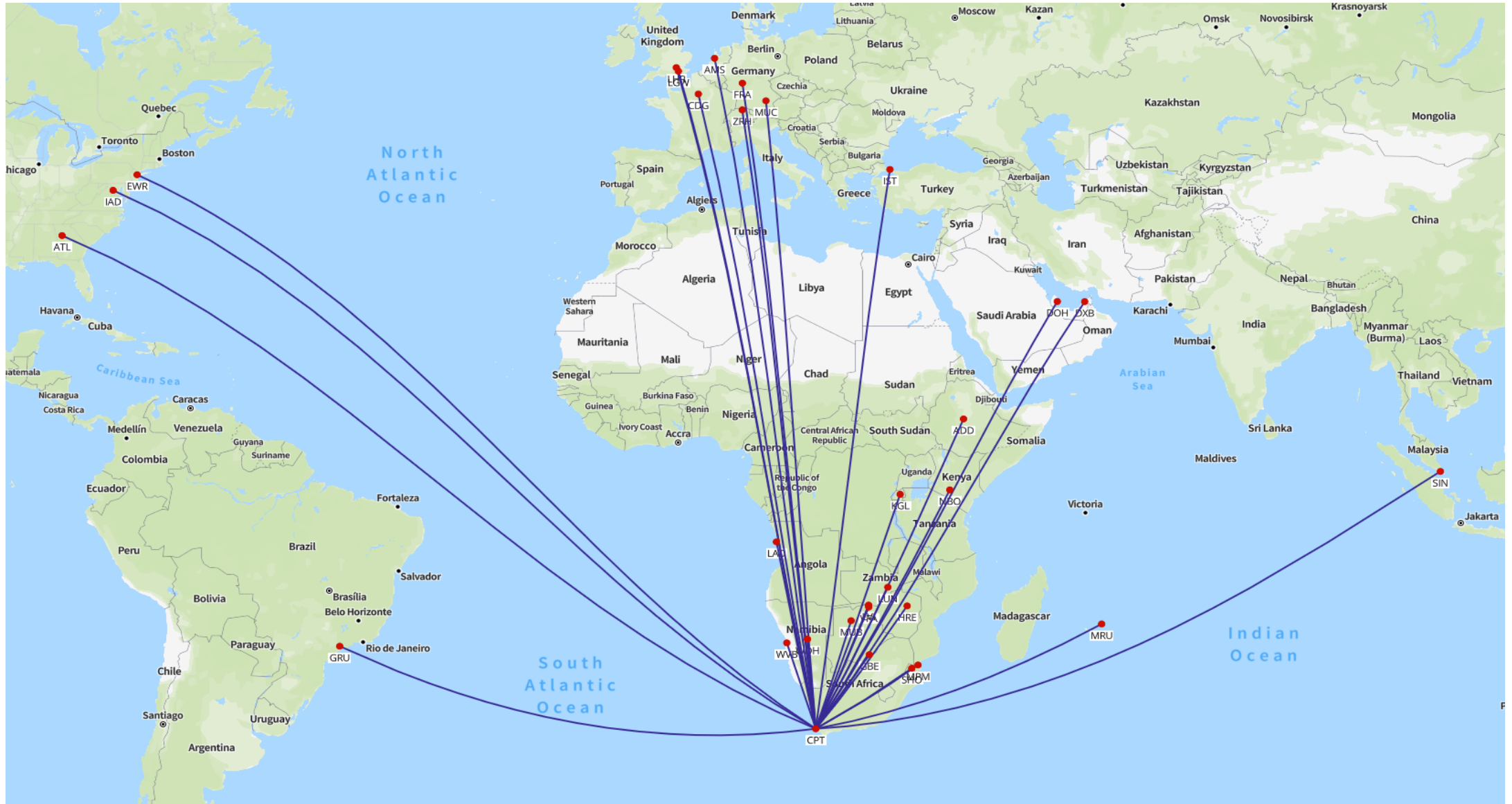
Europe

	Air France	Paris (CDG)* 3x per week <i>*Seasonal</i>
	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

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

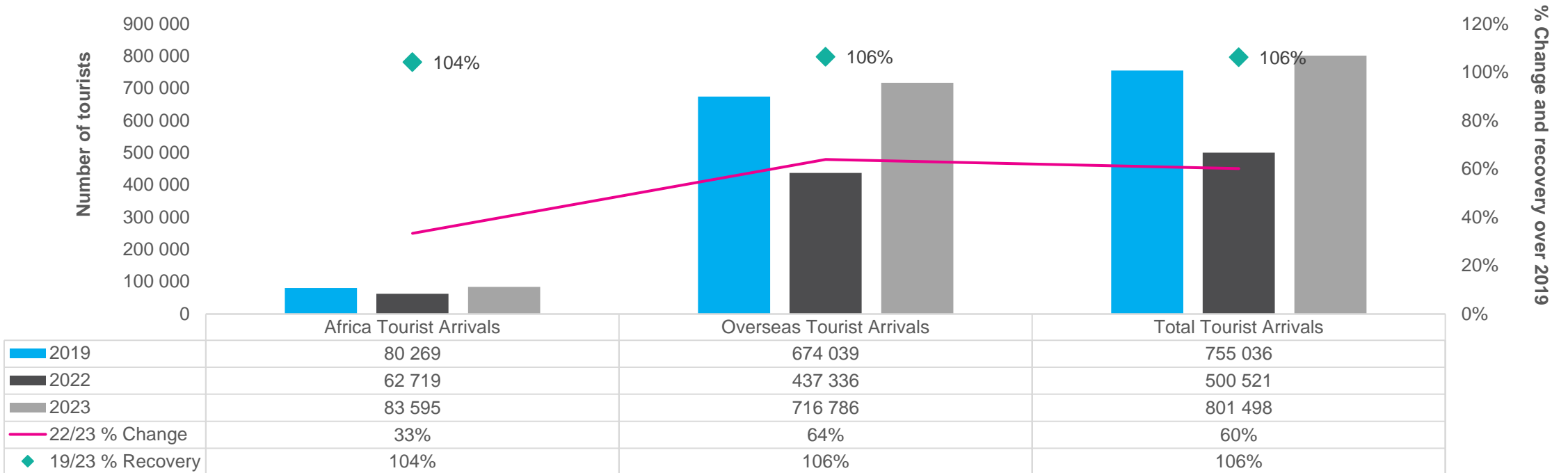


Source: Cape Town Air Access, 2023

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

Between January and November 2023, Cape Town recorded a total of **801,498** tourist arrivals via air, of which 89% originated from overseas markets and 11% from the African continent. Both the overseas and Africa air markets to Cape Town stand at **full recovery** in November 2023 YTD vs. Jan – Nov 2019.

TOURIST ARRIVALS TO CAPE TOWN (VIA AIR) BY ORIGIN, JAN-NOV 2019-2023

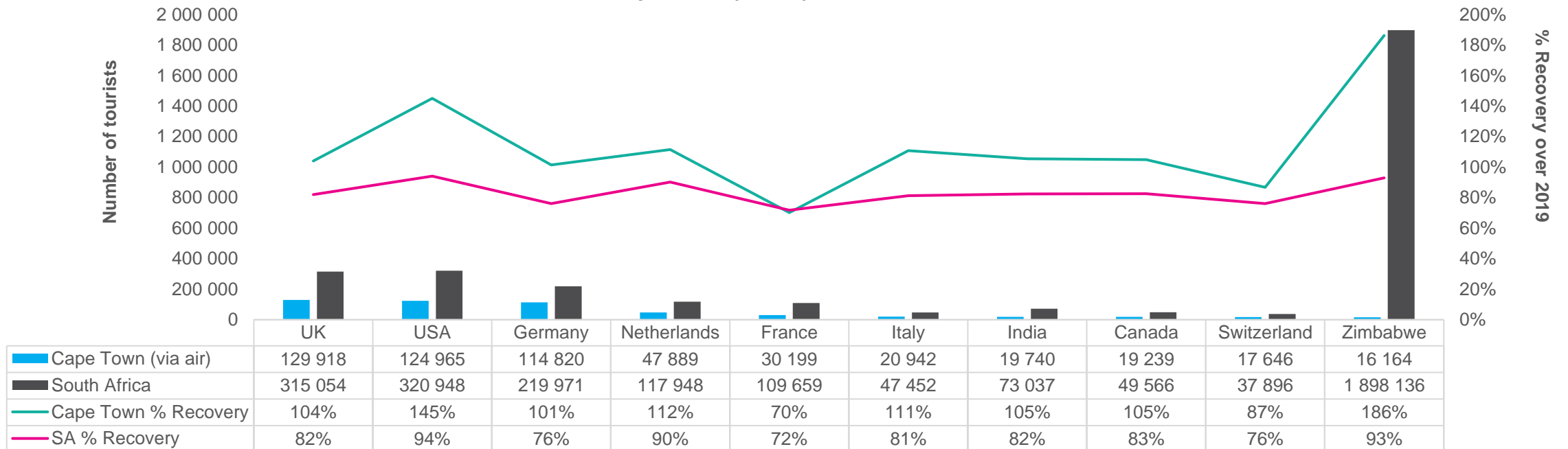


Source: StatsSA, 2023

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

- Between January and November 2023, the UK led as the top air market to Cape Town, with the USA a very close second, followed by Germany, Netherlands and France in the top 5 positions. The European market remains the largest contributor to air arrivals into Cape Town, with 6 out of the top 10 source markets originating from the continent.
- The cumulative total of tourists between January and November 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 - Nov). These markets included the UK (104%), USA (145%), Germany (101%), Netherlands (112%), Italy (111%), India (105%), Canada (105%) and Zimbabwe (186%).

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



Source: StatsSA, 2023

Performance of Western Cape Attractions: November 2023

- 34 participating attractions across the six regions of the Western Cape recorded a total of **425,326** visitors in November 2023, a **28% growth in the number of visitors** when compared to November 2022.
- The top 5 highest year-on-year growth rates in November 2023 were recorded for:
 - Goukamma Nature Reserve (968%)
 - Walker Bay Nature Reserve (141%)
 - Anysberg Nature Reserve (129%)
 - De Hoop Nature Reserve (123%)
 - Stony Point Eco Venue (100%)

Western Cape Attractions	Nov-22	Nov-23	Nov 22/23 % Change
Cape Town			
Kirstenbosch National Botanical Garden	64 827	68 935	6%
Table Mountain Aerial Cableway	79 374	107 481	35%
Table Mountain National Park: Boulders	55 456	81 683	47%
Table Mountain National Park: Cape of Good Hope	71 983	96 683	34%
Robben Island	22 651	23 813	5%
Overberg			
Cape Agulhas Lighthouse	1 390	1 640	18%
Shipwreck Museum	150	165	10%
Grootvadersbosch Nature Reserve	912	770	-16%
Marloth Nature Reserve	462	774	68%
The Whale Trail	338	330	-2%
Walker Bay Nature Reserve	1 246	3 007	141%
Stony Point Eco Venue	75	150	100%
Grootvadersbosch Eco Venues	336	148	-56%
De Hoop Nature Reserve	2 152	4 791	123%
De Mond Nature Reserve	312	22	-93%
Kogelberg Nature Reserve	535	1 056	97%
Garden Route & Klein Karoo			
Goukamma Nature Reserve	63	673	968%
Keurbooms River Nature Reserve	11 276	12 718	13%
Robberg Nature Reserve	9 508	11 107	17%
Weskus			
!Khwa ttu	1 645	2 221	35,0%
Cederberg-Algeria Nature Reserve	2 863	1 937	-32%
Cederberg-Kliphuis Nature Reserve	246	154	-37%
Groot Winterhoek Wilderness Area	330	302	-8%
Matjiesrivier Nature Reserve	1 067	819	-23%
Rocherpan Nature Reserve	107	168	57%
Winelands			
Protea Tractor Trip	494	484	-2%
Birds Paradise	429	363	-15%
Assegaaibosch Nature Reserve	387	231	-40%
Hottentots Holland Nature Reserve	384	430	12%
Limietberg Nature Reserve	1 601	1 826	14%
Vrolijkheid Nature Reserve	673	138	-79%
Cape Karoo			
Anysberg Nature Reserve	51	117	129%
Gamkaberg Nature Reserve	169	144	-15%
Swartberg Nature Reserve	52	46	-12%
Total	333 544	425 326	28%

Sources: LTO's, and Attractions, 2023

Visitor Trends Mobile Location Data Insights

November 2023

Western Cape Mobile Location Data Insights

What is mobile location data?

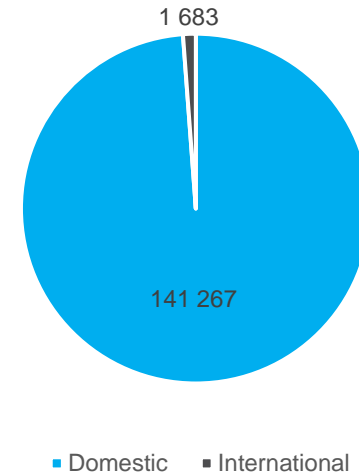
- Geo or spatial data from smartphones. When a user installs an app, they are often asked to share their location data with the company, which provides the app, and other companies who are partners with the app publisher.
- Users can “opt in” to location sharing (or choose not to “opt in”). When they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

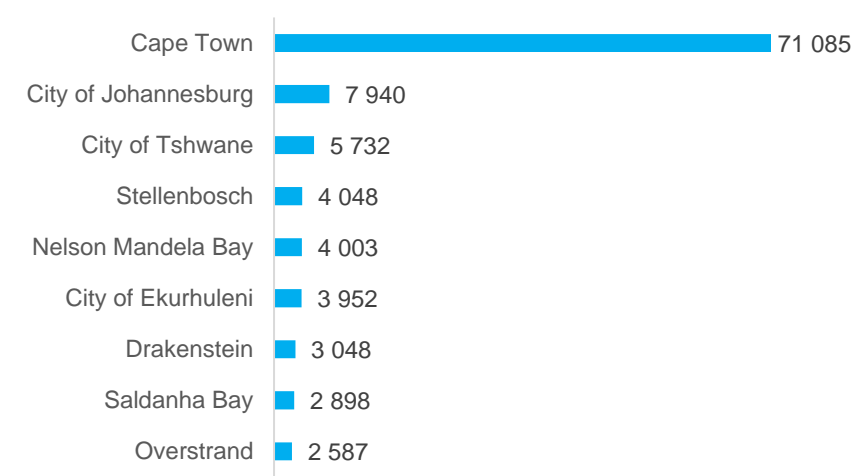
- Mobile location-based data offers a more granular lens on visitor behaviour and provides a much larger sample size.
- These insights aim to facilitate a better understanding of visitor movement throughout the Western Cape’s six region.
- Mobile location data serves as a sample. It is not 100% of visitors, 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 **141,267 domestic** and **1,683 international** tourists who visited the Western Cape in November 2023. Within the domestic data set, **71,085** of the sampled tourists were from Cape Town and from the international sampled tourists, **336** were from the United States.

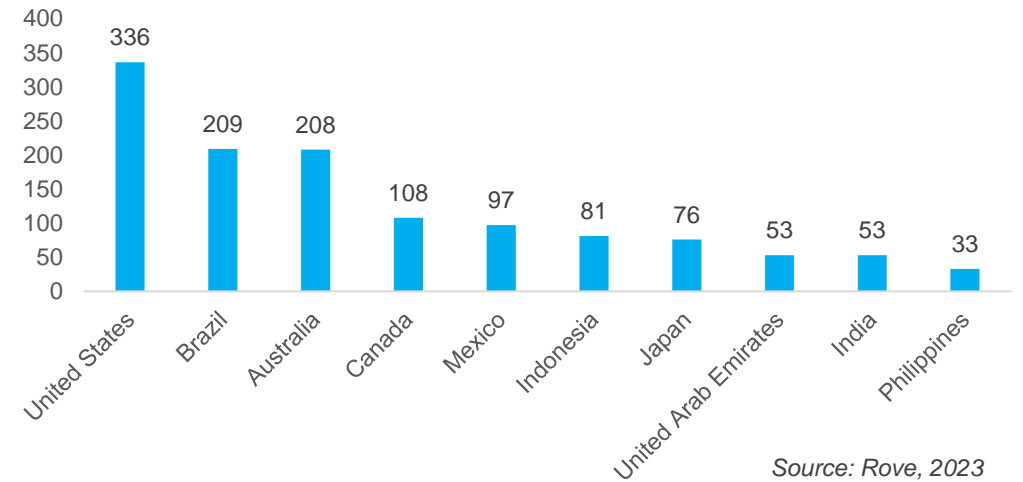
Sample Size, Nov. 2023



Domestic Origin Municipality, Nov. 2023



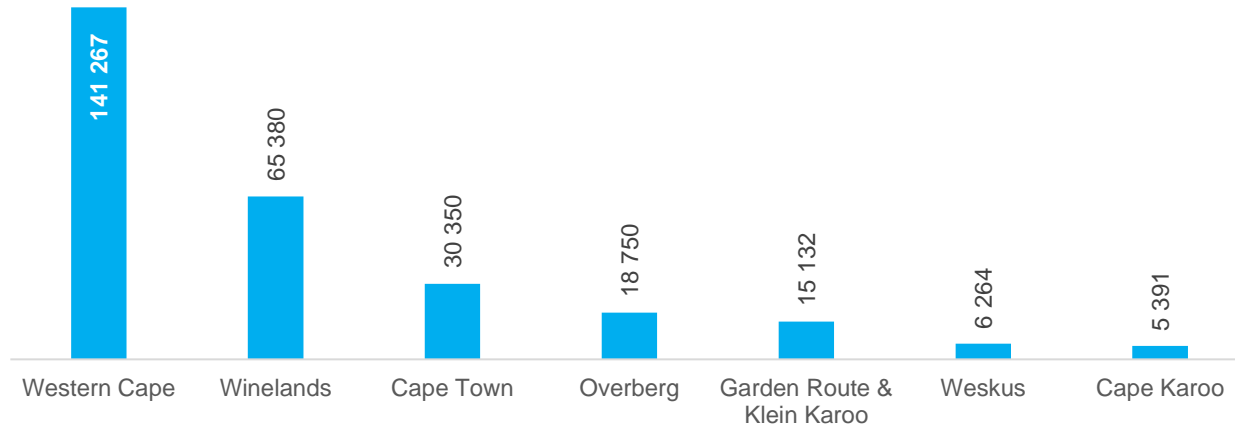
International Origin Country, Nov. 2023



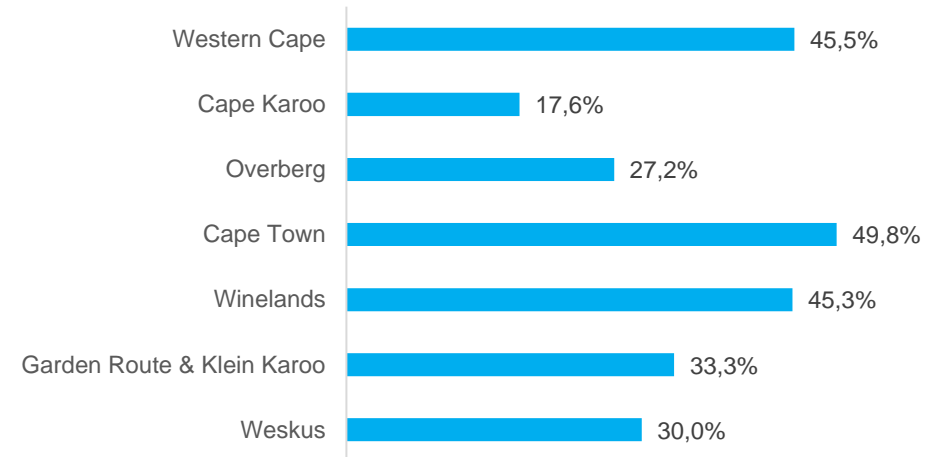
Mobile Insights: Domestic Visitor Trends

- In November 2023, the Western Cape received an average of 45.5% repeat tourists.
- The Winelands (46.3%) and Cape Town (21.5%) saw the most domestic tourists in terms of volume of sample size and Cape Karoo (3.8%) with the least sample size.
- Cape Town (49.8%), the Winelands (45.3%), Garden Route & Klein Karoo (33.3%), and Weskus (30.0%) were the most popular regions for domestic repeat visits during the month of November 2023.

Domestic Sample Size, Nov. 2023



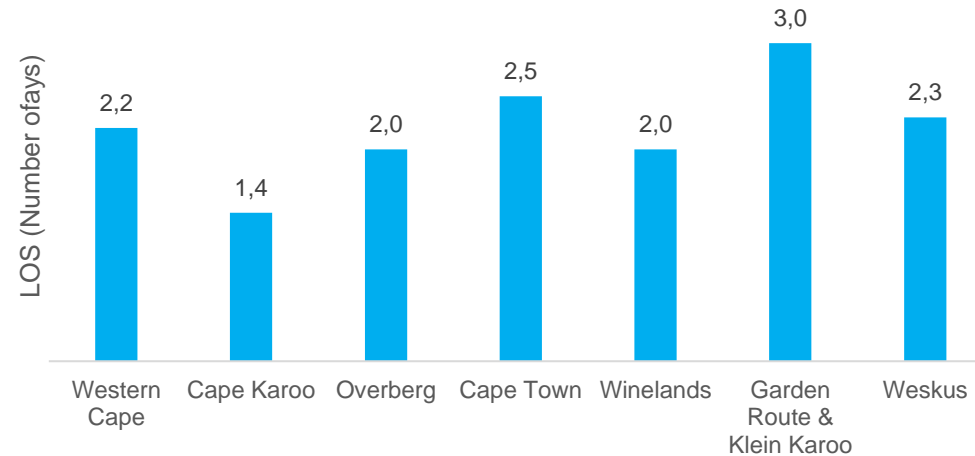
Domestic Repeat Visitors, Nov. 2023



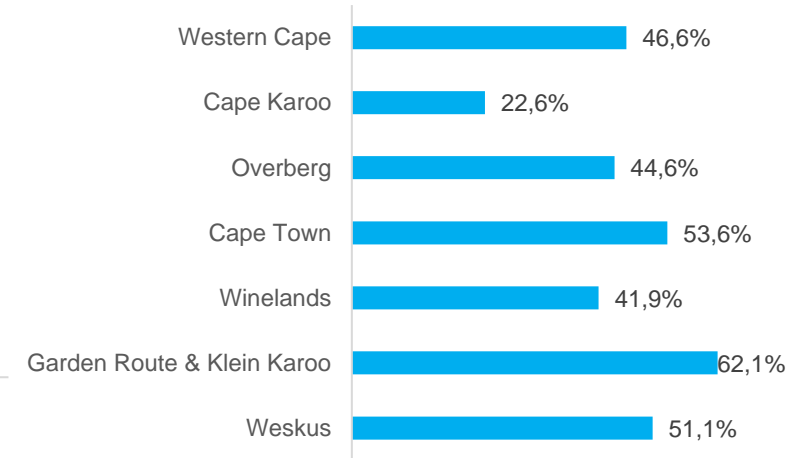
Mobile Insights: Domestic Visitor Trends

- On average, domestic tourists spent the longest time in the Garden Route & Klein Karoo (3.0 days), Cape Town (2.5 days), Weskus (2.3 days), and Overberg and Winelands (2.0 days respectively).
- Over 60% of sampled tourists stayed overnight in the Garden Route & Klein Karoo and 53.6% in Cape Town.
- In contrast, the data shows that 72.7% of domestic tourists visit the Cape Karoo for a day.

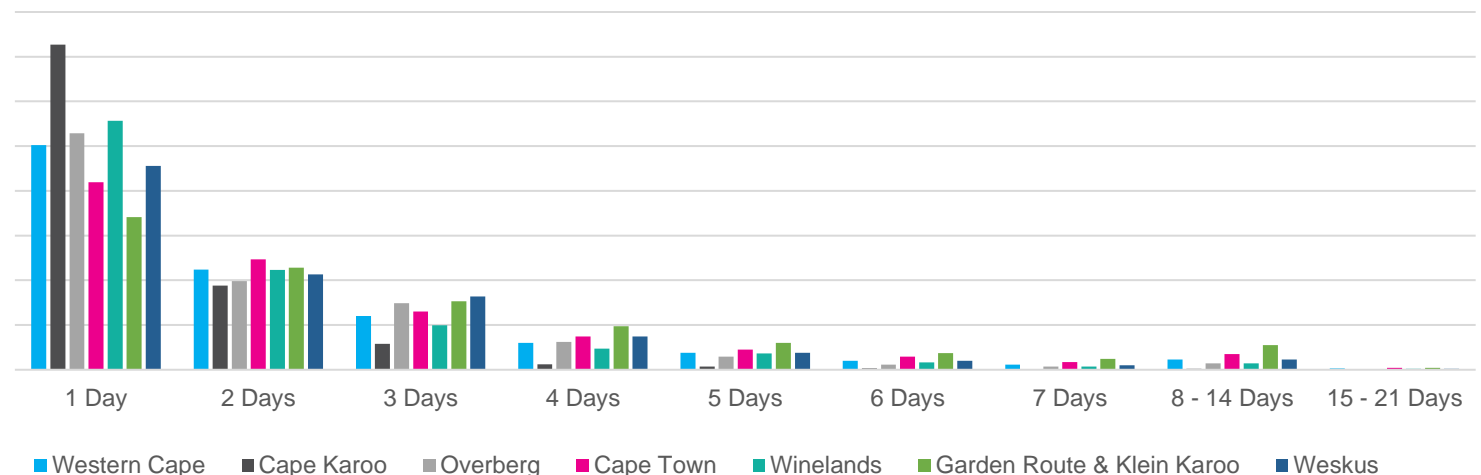
Average Length of Stay (LOS), Nov. 2023



% Overnight Stays, Nov. 2023



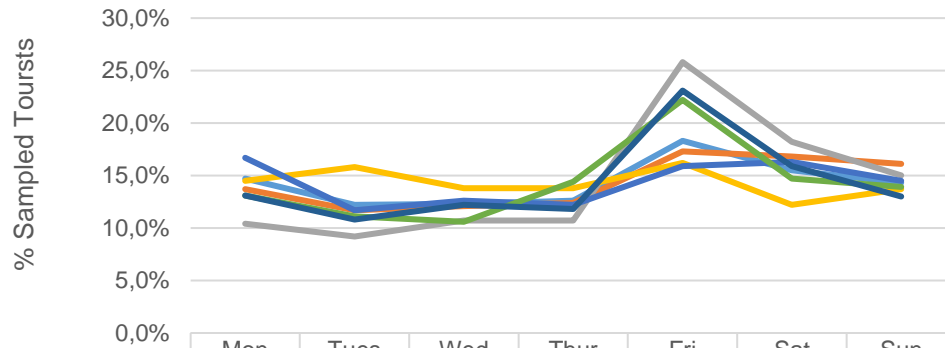
Average Length of Stay (Number of Days): Domestic, Nov. 2023



Mobile Insights: Domestic Visitor Trends

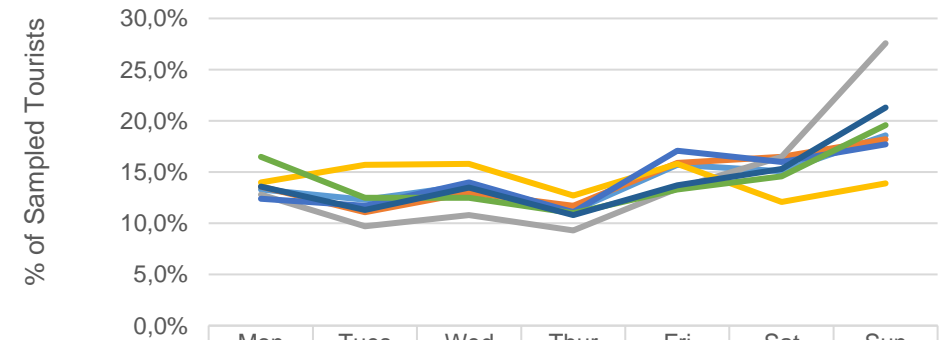
- The data shows that domestic tourists visiting the Western Cape tend to arrive on a Friday and leave on a Sunday.
- This trend is also observed in the Overberg, Weskus, Garden Route & Klein Karoo, Cape Karoo, and the Winelands indicating that weekend stays are popular in the province and these regions.
- The most popular arrival day for Cape Town was Friday and Wednesday was the day of departure.

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



	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Western Cape	14,7%	12,2%	12,3%	12,6%	18,3%	15,5%	14,3%
Cape Karoo	13,7%	11,7%	12,1%	12,4%	17,3%	16,8%	16,1%
Overberg	10,4%	9,2%	10,7%	10,7%	25,8%	18,2%	15,0%
Cape Town	14,5%	15,8%	13,8%	13,8%	16,2%	12,2%	13,7%
Winelands	16,7%	11,7%	12,6%	12,2%	15,9%	16,3%	14,5%
Garden Route & Klein Karoo	13,1%	11,1%	10,6%	14,4%	22,2%	14,7%	13,9%
Weskus	13,1%	10,8%	12,2%	11,8%	23,1%	15,9%	13,0%

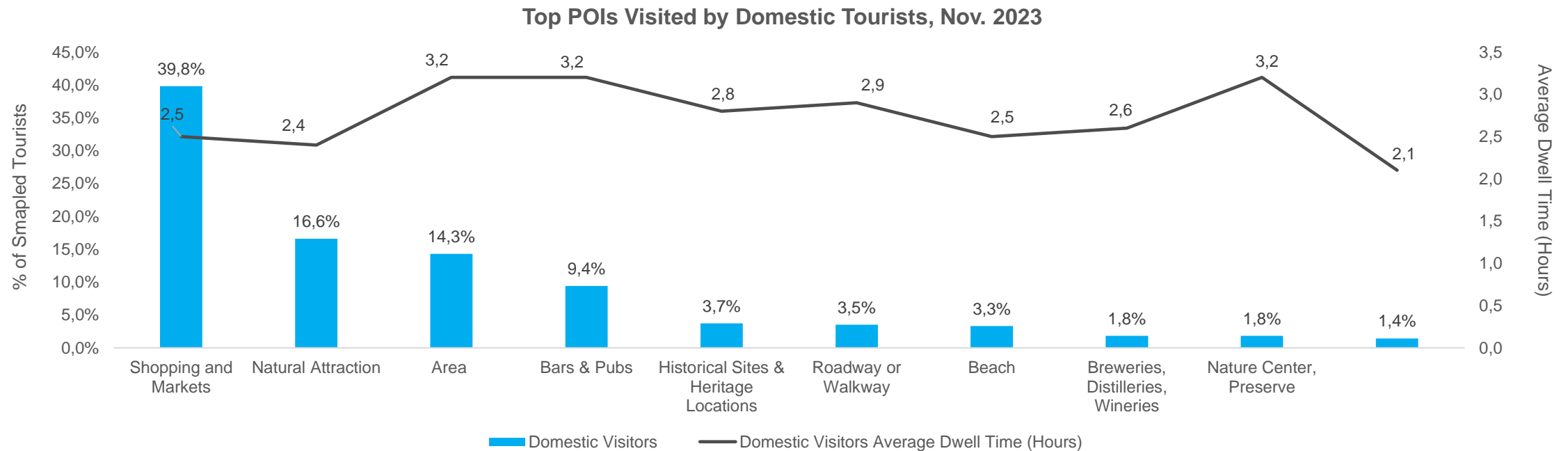
Popular Departure Days of the Week: Domestic, Nov. 2023



	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Western Cape	13,3%	12,3%	13,7%	11,2%	15,7%	15,1%	18,6%
Cape Karoo	13,6%	11,1%	13,0%	11,7%	15,9%	16,5%	18,2%
Overberg	12,8%	9,7%	10,8%	9,3%	13,4%	16,5%	27,6%
Cape Town	14,0%	15,7%	15,8%	12,7%	15,8%	12,1%	13,9%
Winelands	12,4%	11,7%	14,0%	11,1%	17,1%	16,0%	17,7%
Garden Route & Klein Karoo	16,5%	12,5%	12,5%	11,0%	13,3%	14,6%	19,6%
Weskus	13,6%	11,3%	13,5%	10,8%	13,7%	15,3%	21,3%

Points of Interest (POIs) Visited: Domestic Tourists

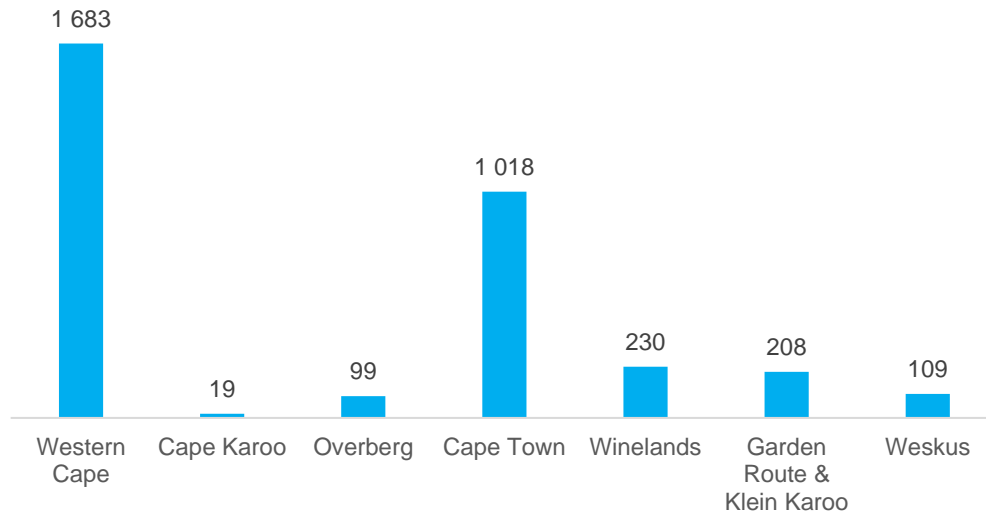
- **Shopping and markets** were the most popular type of attraction visited by domestic tourists with an average dwell time of **2.5 hours**.
- **Natural attractions** ranked as the 2nd most popular point of interest among domestic tourists with an average dwell time of **2.4 hours**.
- **Spending time 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.
- **Historical sites and heritage locations** ranked the 5th most popular point of interest among domestic tourists, with an average dwell time of **2.8 hours**.



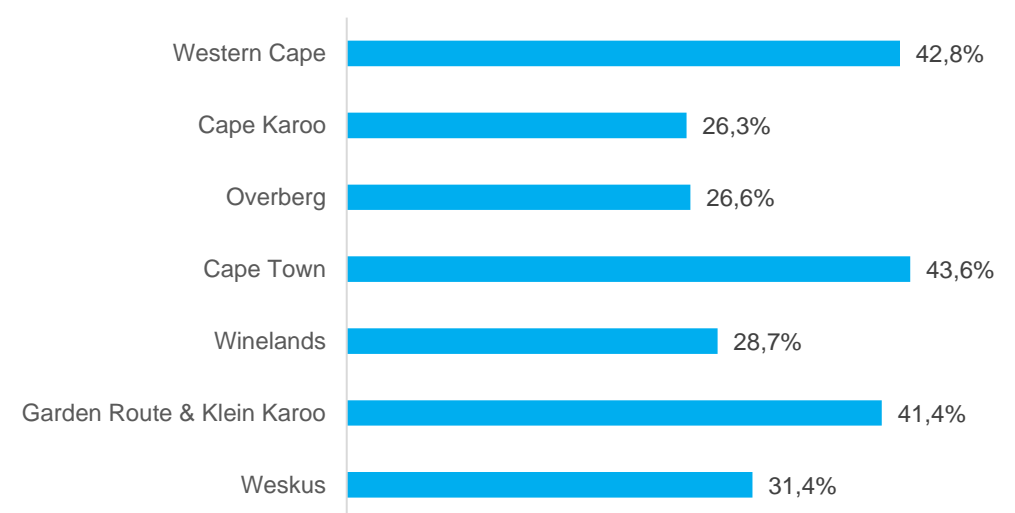
Mobile Insights: International Visitor Trends

- 60.5% of the sampled international tourists visited Cape Town followed by 13.7% who visited the Winelands and 12.4% visiting the Garden Route & Klein Karoo.
- Based on a sample size of only 19 international tourists, visitor trends for the Cape Karoo are not statistically representative.
- Cape Town (43.6%), Garden Route & Klein Karoo (41.4%), and the Weskus (31.4%) regions saw the most international repeat visitors in November 2023.

International Sample Size, Nov. 2023



International Tourists Repeat Visits, Nov. 2023

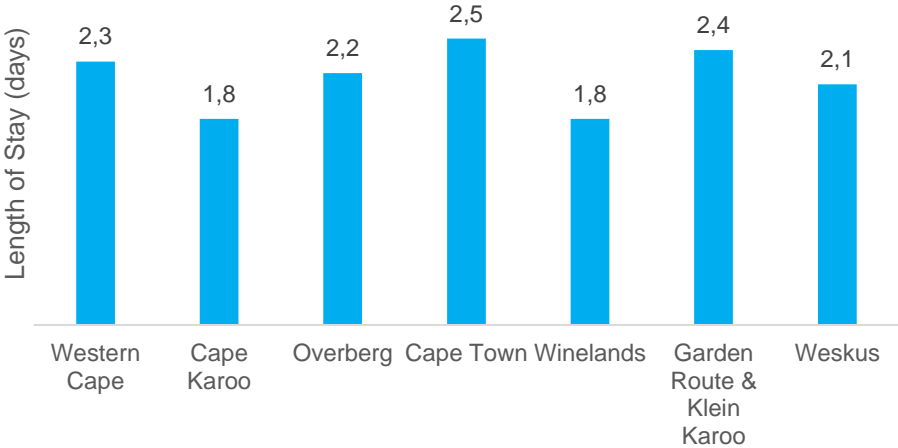


Source: Rove, 2023

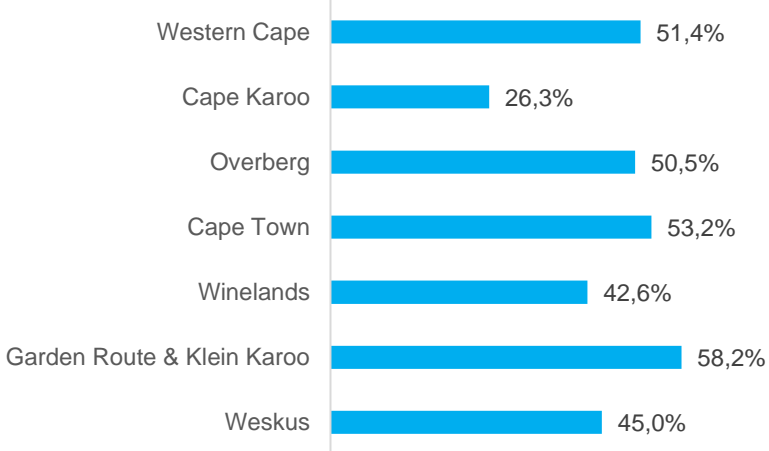
Mobile Insights: International Visitor Trends

- International tourists spent the longest time in Cape Town (2.5 days), Garden Route & Klein Karoo (2.4 days), Overberg (2.2 days), and Weskus (2.1 days).
- Close to 60% of sampled tourists stayed overnight in the Garden Route & Klein Karoo, 53.2% stayed overnight in Cape Town and 50.5% in the Overberg region.
- 45% of tourists stayed overnight in the Weskus region and Winelands with 42.6%.
- The data shows that 63.2% of international tourists visited Cape Karoo for a day and 40% stayed between 8-14 days in the Winelands.
- An overnight stay is defined as tourists that arrive prior to midnight and stay until 07:00 the following day.

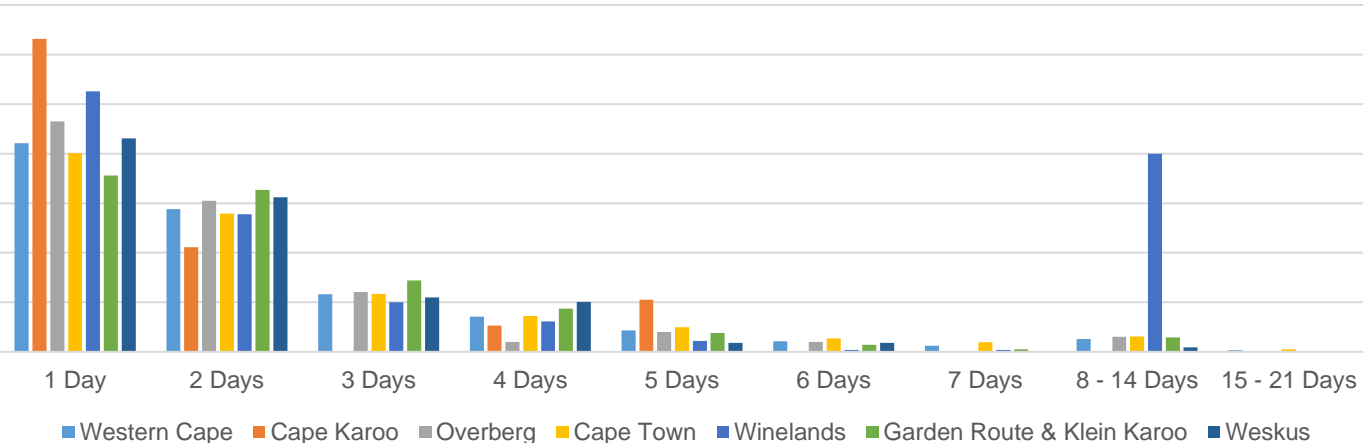
Average Length of Stay (LOS), Nov. 2023



% Overnight Stays, Nov. 2023



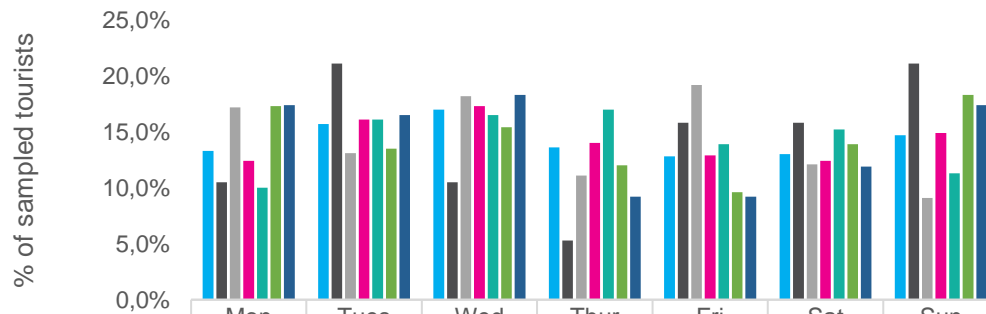
Average Length of Stay (Number of Days): International, Nov. 2023



Mobile Insights: International Visitor Trends

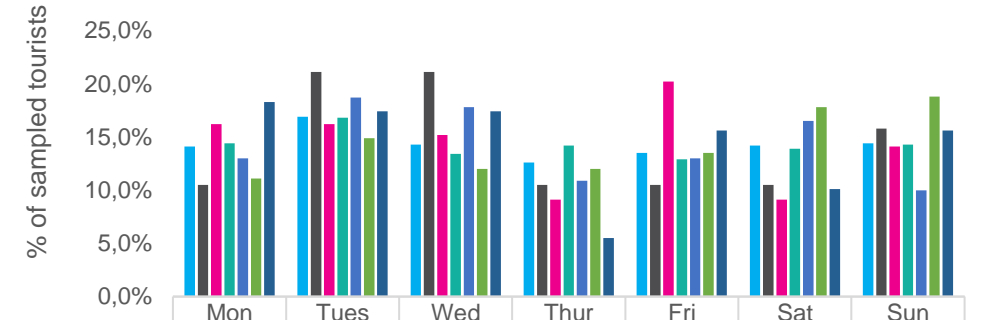
- During November 2023, international tourists to the **Western Cape** mainly arrived on a Tuesday and departed on Wednesday.
- The sampled tourists (19) in the **Cape Karoo**, arrived on a Tuesday and departed on a Sunday.
- Tuesday was the most popular arrival day and Wednesday was the day of departure for **Cape Town**.

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



Western Cape	13,3%	15,7%	17,0%	13,6%	12,8%	13,0%	14,7%
Cape Karoo	10,5%	21,1%	10,5%	5,3%	15,8%	15,8%	21,1%
Overberg	17,2%	13,1%	18,2%	11,1%	19,2%	12,1%	9,1%
Cape Town	12,4%	16,1%	17,3%	14,0%	12,9%	12,4%	14,9%
Winelands	10,0%	16,1%	16,5%	17,0%	13,9%	15,2%	11,3%
Garden Route & Klein Karoo	17,3%	13,5%	15,4%	12,0%	9,6%	13,9%	18,3%
Weskus	17,4%	16,5%	18,3%	9,2%	9,2%	11,9%	17,4%

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

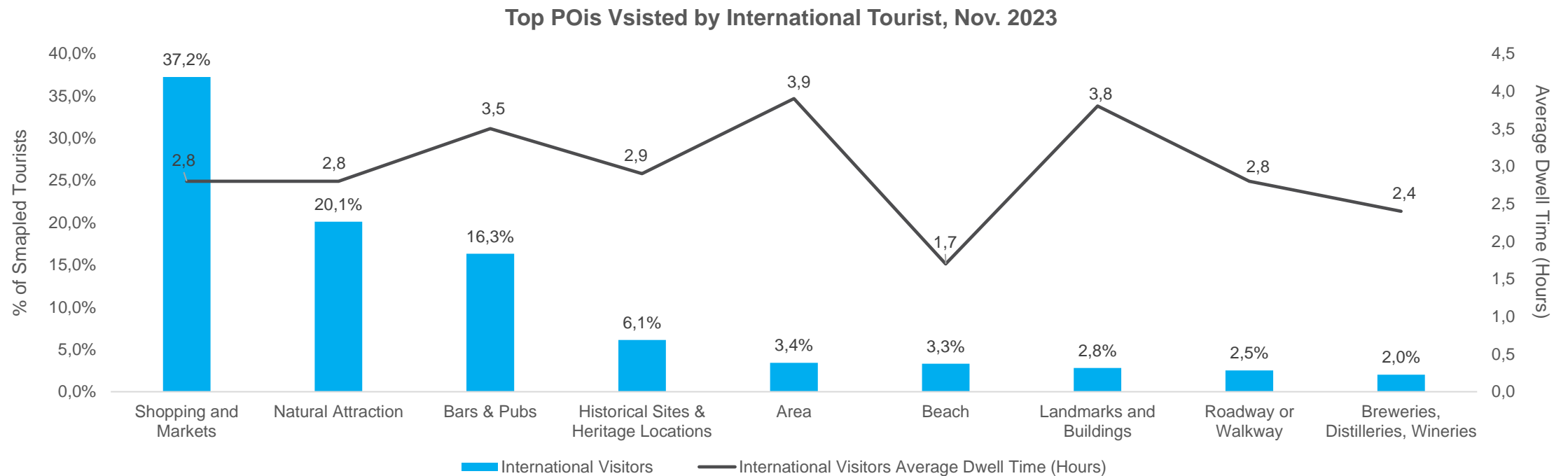


Western Cape	14,1%	16,9%	14,3%	12,6%	13,5%	14,2%	14,4%
Cape Karoo	10,5%	21,1%	21,1%	10,5%	10,5%	10,5%	15,8%
Overberg	16,2%	16,2%	15,2%	9,1%	20,2%	9,1%	14,1%
Cape Town	14,4%	16,8%	13,4%	14,2%	12,9%	13,9%	14,3%
Winelands	13,0%	18,7%	17,8%	10,9%	13,0%	16,5%	10,0%
Garden Route & Klein Karoo	11,1%	14,9%	12,0%	12,0%	13,5%	17,8%	18,8%
Weskus	18,3%	17,4%	17,4%	5,5%	15,6%	10,1%	15,6%

- Arrival in the **Winelands** region was on Tuesday and departure was on Thursday.
- **Garden Route & Klein Karoo** arrival day was either Saturday or Sunday and departure day was on Sunday.
- Monday was the most popular arrival day and the departure day from the **Weskus** was either Monday or Sunday.
- In the **Overberg**, Friday was the popular day for arrival and departure.

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 **2.8 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 **3.5 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 **2.9 hours**.
- **Spending time in areas** like Cederberg Wilderness, Stanford Valley, Hemel-en-Aarde Valley, and Van Dyk's Bay ranked 5th amongst the top POIs visited by international tourists, with an average dwell time of **3.9 hours**.



Mobile Tourists and Non-Tourists Definitions

- About Mobile Location Data

- Privacy compliant data is collected from location-enabled apps on mobile devices. Data is collected when these 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 as if it is 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 visitor who appears in the study geography for a minimum period (exclude commuters/passers through, etc.)

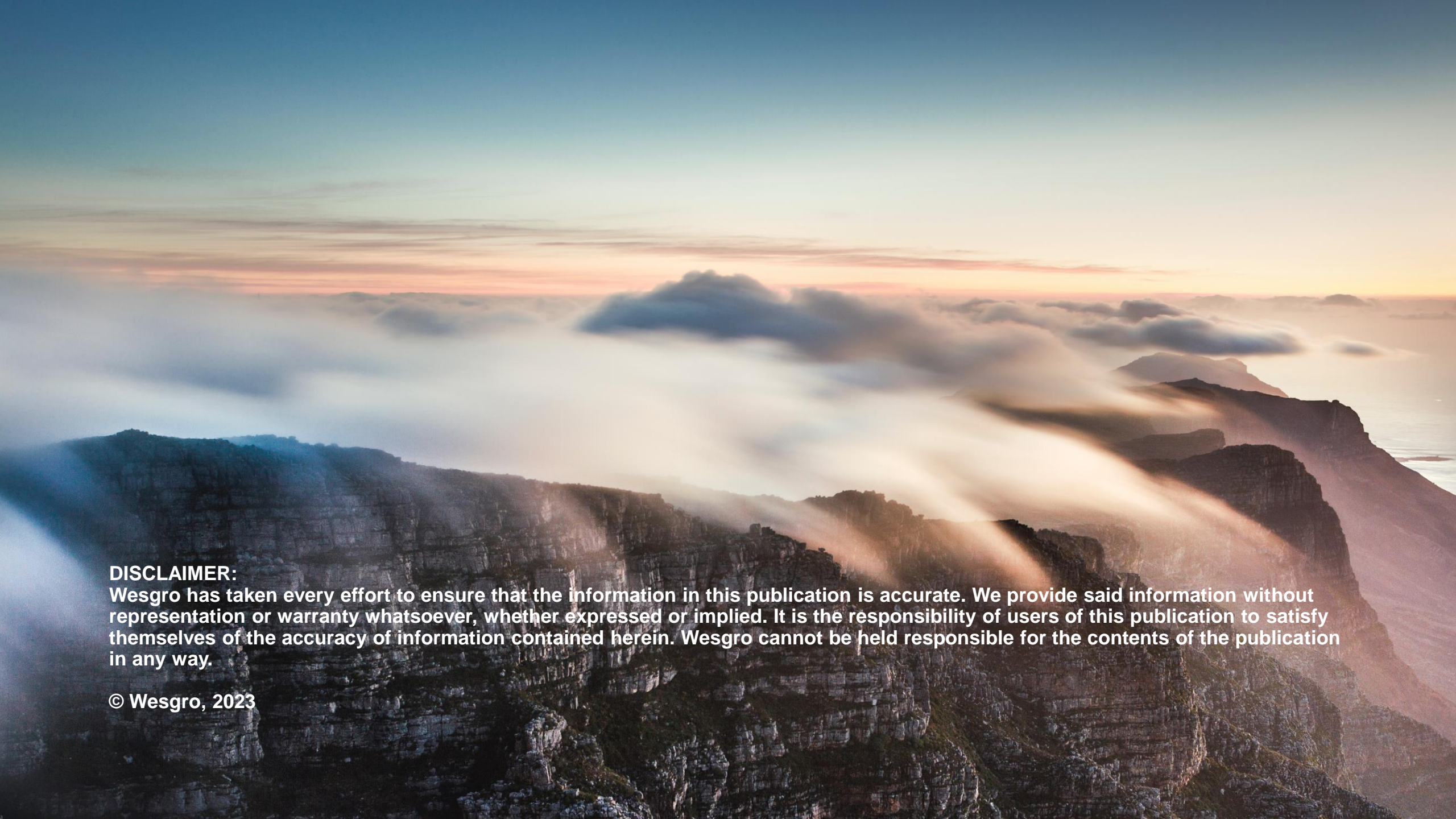
Source: Rove, 2023

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 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 travelled 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 Minimum duration of visit of 45 minutes excludes commuters driving through each city 	
Point of Interest Study Geography	Tourists are defined as:
All Tourism Experiences	When a visitor stays in the polygon for more than 15 minutes and has not visited the polygon more than 20 times in any 90 day period, they are a tourist
Notes and Considerations: <ul style="list-style-type: none"> Any 90-day period refers to any consecutive 90 days in their mobile location data history Filter out visitors not staying for any meaningful length of time (couriers, taxis etc.). Filter out people who work at the Tourism Experience. 	
What are Tourist Segments?	
<ul style="list-style-type: none"> Local Tourists: Tourists who reside within the same region. Domestic Tourists: Tourists who reside in South Africa, outside of 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
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]. 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 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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