Niche Tourism Study

Adventure Tourism: Market Potential in South Africa and the Western Cape

March 2024

WESGRO
cape town & western cape
research

Contents

WESGRO
cape town & western cape
research

1. Report purpose and methodology

Purpose

1. The report on adventure tourism aims to provide useful information that can assist tourism operators, Destination Marketing Organisations (DMOs), business leaders, and government officials in South Africa and the Western Cape to develop practical marketing strategies.

2. The report offers insights that aim to increase awareness, educate, and inspire these stakeholders to enhance and sustain the demand for adventure tourism.

Methodology

1. This study was compiled from desktop research and reviews of international, national, and local sources regarding the adventure tourism market.

2. Rove mobile location data insights were used to illustrate the sample of the adventure tourism market per points of interest (POIs) in the Western Cape.

3. A regional visitor tracking survey was used to illustrate the sample of the adventure tourism market per region in the Western Cape.

Objectives of the study

1. To gain a comprehensive understanding of the adventure tourism market in South Africa and the Western Cape

2. To identify the key drivers of adventure tourism in the Western Cape and understand the motivations of tourists who visit this region.

3. To identify the barriers to growth and opportunities for increasing the demand for adventure tourism in the Western Cape.

2. Methodology: Rove mobile location data insights

2.1 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.

2.2 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.

.

2.3 Participation and sample size

The insights reflected in this section highlight mobile location data from a sample of 1,186 tourists who visited the following adventure points of interest (POI) in the Western Cape between January and December 2022:

Table 1: Total number of tourists per adventure POIs, Jan-Dec 2022

Adventure points of interest (POI)	Number of Tourists
Atlantis Sand Dunes	625
Cape Town Ziplining	80
Ceres Zipling	157
Stormsriver Suspension Bridge	24
Viljoensdrift River Cruise	300

Source: ROVE (2023)

3. Regional visitor tracking surveys: Methodology and sample size

Responses to the regional visitor tracking surveys are used as a proxy to indicate the key trends within the Western Cape and the various regions. It is important to note that absolute figures cannot be determined from these surveys, as the survey responses are a sample of the tourists into the respective tourism offices across the Western Cape and would thus represent a sample of the visitors. Therefore, where statistically relevant absolute numbers may be given, however, a share is provided to indicate the trend. This is based on international best practice in the use of surveys within the tourism industry for determining key trends.

Definition: *Visitor: Any person travelling to a place other than his/her usual environment for less than 12 months and whose main purpose for the travel is other than the exercise of an activity to be remunerated at the place visited.*

Between January to December 2022, a total of 10,845 responses to the regional visitor tracking surveys were received from the various tourism offices in the Western Cape and **911 of the responses were from the visitors who took part in adventure activities.** The participating tourism offices were from the following regions:

Table 2: Total number of responses from Jan-Dec 2022

Region	Number of Surveys
Garden Route & Klein Karoo	70
Overberg	467
Weskus	346
Winelands	28

Source: Wesgro (2023)

4. Definitions

- **Visitor:** *“Any person traveling to a place other than his/her usual environment for less than 12 months and whose main purpose for the travel is other than the exercise of an activity to be remunerated at the place visited.” (SAT, 2023)*

- **Tourist:** *“A visitor who stays at least one night in the place visited.” (SAT, 2023)*

- **International Tourist: “***An international visitor who stays at least one night in collective or private accommodation in the country visited.” (SAT, 2023)*

- ***Local tourists:*** *“Tourists who reside within the same Region.” (SAT, 2023)*

- **Responsible Tourism** is *“tourism which minimises negative social, economic and environmental impacts. Generates greater economic benefits for local people and enhances the well-being of communities.” (UNWTO, 2014)*

- **Responsible Travel “***refers to the behavior of individual travellers aspiring to make choices according to sustainable tourism practices.” (Global Sustainable Tourism Council, 2022)*

- ***Destination Management and/or Marketing Organisations (DMOs****) “are dedicated entities that are established to take on some of the functions of destination management directly, rather than relying on the partners to execute.” (World Bank Group. 2022)*

5. Adventure tourism overview

The Adventure Travel Trade Association (ATTA) defines adventure tourism as:

"A trip that includes at least two of the following three elements – physical activity, natural environment, and cultural immersion."

- Adventure tourism is a rapidly growing market in South Africa's tourism industry, as highlighted by Geldenhuys' 2018 academic study. Industry stakeholders are becoming increasingly aware of the economic value it brings. This study also showed that adventure tourism places a strong emphasis on sustainability, conservation, and protection of the environment. As a result, tourists from various countries are willing to travel to destinations that offer a range of outdoor, nature, scenic beauty and adrenaline experiences.

- According to Allied Market Research (2023), the global adventure tourism market in 2022 was valued at $366.7 billion and is forecasted to increase to $4.6 trillion by 2032. This is supported by the United Nations World Tourism Organisation's Global Report on Adventure Tourism which points out that this sub-sector attracts high-value tourism consumers with high spending power which directly has a spillover effect on the supporting local economies.

- With the tourism industry bouncing back after the travel ban, it is essential for destination marketing organisations (DMOs), tourism operators, and businesses to acknowledge that tourists' decision-making and preferences are evolving. The latest data from South African Tourism (2023) reveals that consumers now prioritise gathering and sharing "real-time" experiences over collecting products during their travels.

- The Western Cape is ideal for catering to the niche adventure tourism market due to the growing focus on sustainability and the importance of promoting understanding between humans and nature.

6. Adventure tourism travel market to South Africa

- In 2022, Europe accounted for the largest share of tourists (63.7%) enjoying adventure experiences in South Africa, followed by North America (16.2%) and Africa (11.3%).

- Among the top 10 activities enjoyed by Europeans in 2022, adventure ranked as the most popular activity (enjoyed by 63.7% of tourists), followed by wildlife experiences (61.5%).

- Figure 3 shows that 5 markets that engaged in adventure experiences in South Africa were the UK (18.3%), Germany (13.9%), the USA, (13.8%), Netherlands (6.7%), and France (5.6%).

Figure 1: International tourists who engaged in adventure experiences in South Africa, 2022

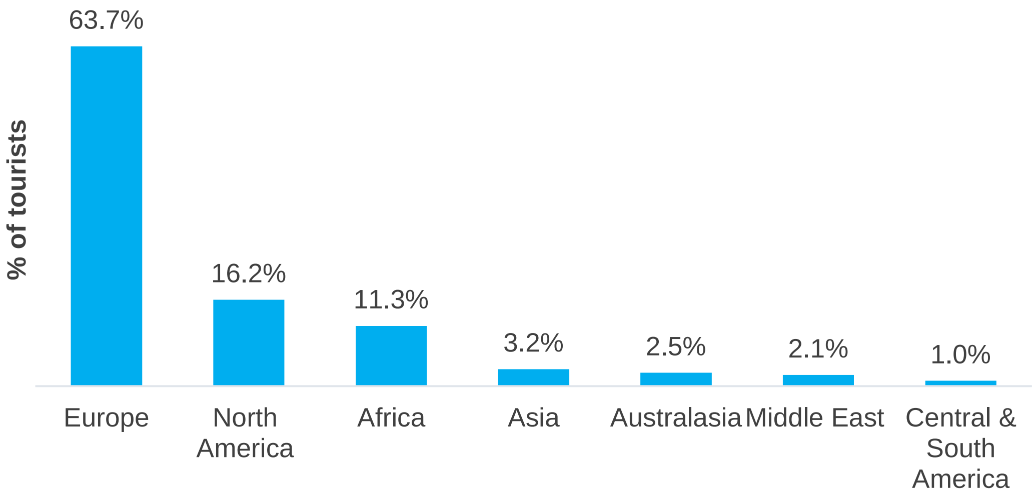
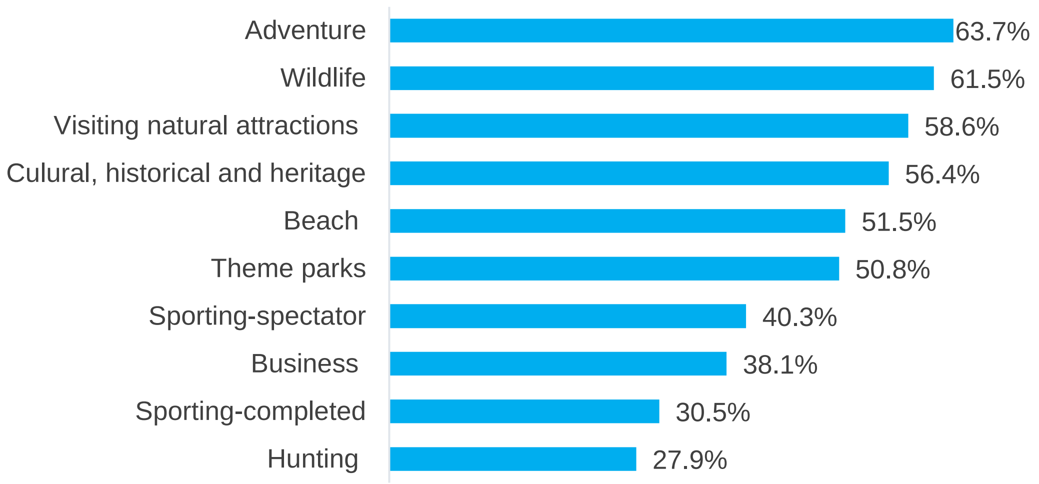


Figure 2: Top 10 activities undertaken by European tourists to South Africa, 2022



Source: South African Tourism (2022)

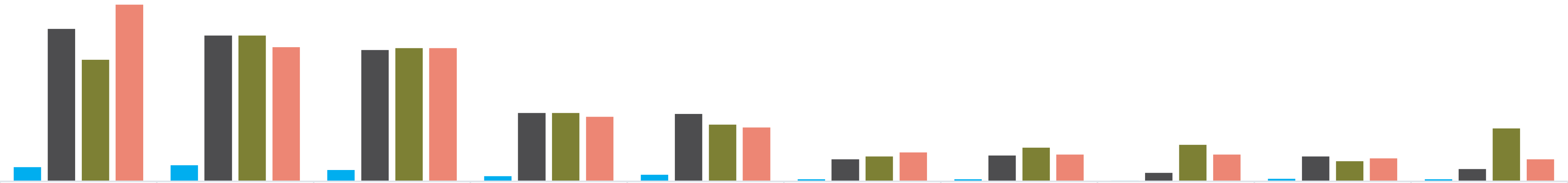
wesgro
cape town & western cape
research

6. Adventure tourism travel market to South Africa

- As previously mentioned, European countries dominated when it came to engaging in adventure experiences in South Africa with 6 out of 10 markets originating from the continent. The leading source markets, the UK, Germany, and the USA, held a substantial interest in adventure experiences in South Africa, particularly during the Covid-19 period and when tourism was reopened in the country.

- Upon analysing the African tourism industry, it has been observed that Namibia and Lesotho have been actively participating in adventure experiences in South Africa during the year 2021 as compared to the previous year 2020. However, the data suggests that there has been a slight decrease in tourist participation in adventure experiences during the year 2022.

Figure 3: Top 10 source markets engaging in adventure experiences in South Africa, 2019-2022



	UK	Germany	USA	Netherlands	France	Belgium	Switzerland	Namibia	Canada	Lesotho
2019	1.5%	1.7%	1.2%	0.5%	0.7%	0.2%	0.2%	0.1%	0.3%	0.2%
2020	15.8%	15.1%	13.6%	7.1%	7.0%	2.3%	2.7%	0.9%	2.6%	1.3%
2021	12.6%	15.1%	13.8%	7.1%	5.9%	2.6%	3.5%	3.8%	2.1%	5.5%
2022	18.3%	13.9%	13.8%	6.7%	5.6%	3.0%	2.8%	2.8%	2.4%	2.3%

Source: South African Tourism (2022)

7. Adventure tourism travel market to the Western Cape

Figure 4: Share of tourists engaging in adventure activities by province, 2022

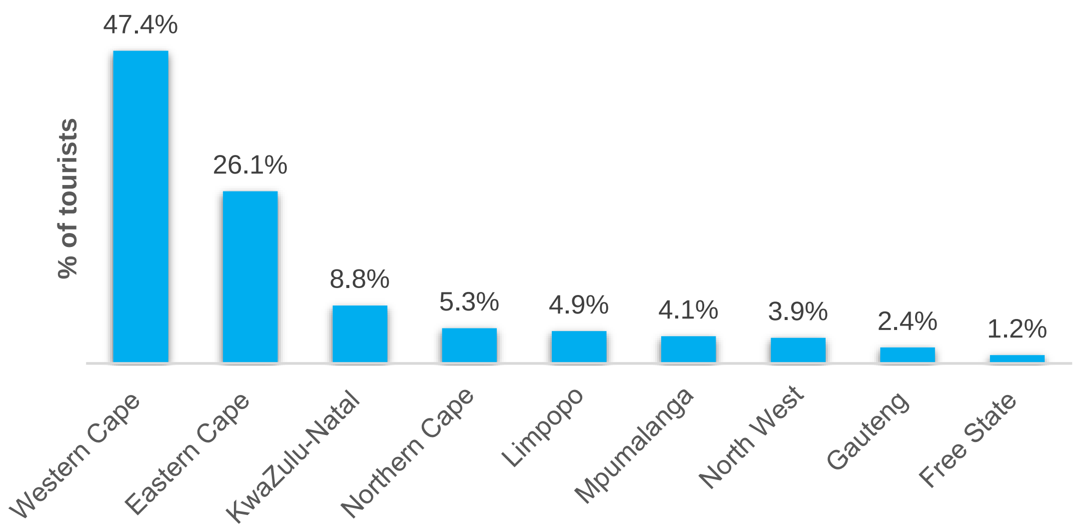
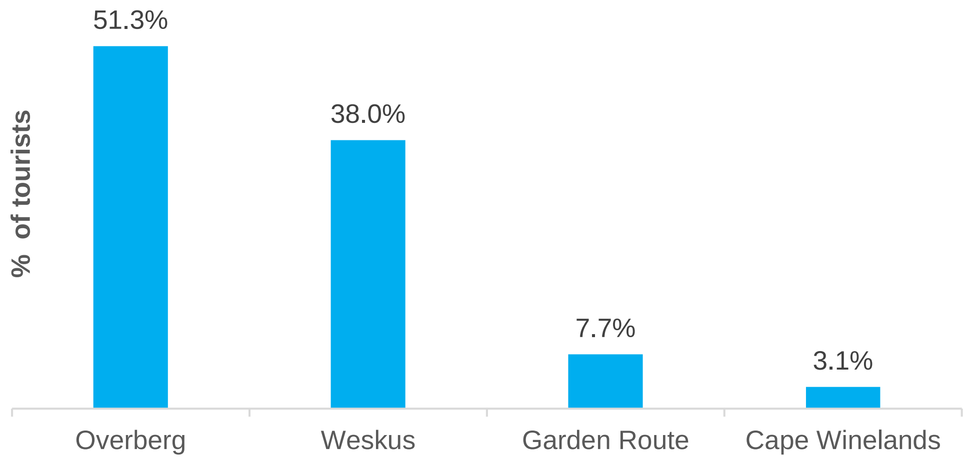
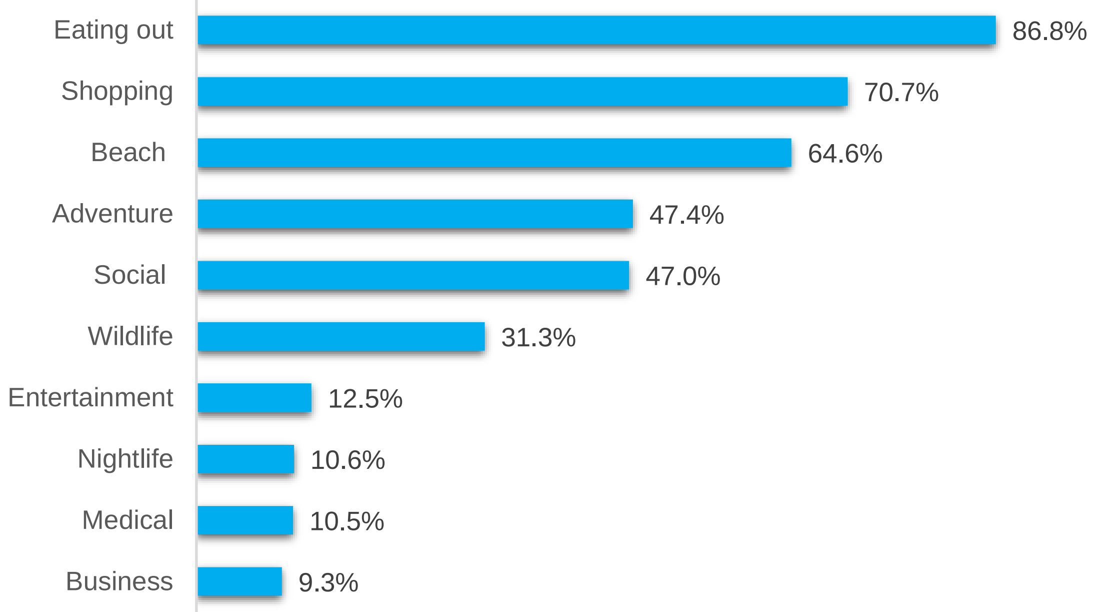


Figure 5: Western Cape regions visited for adventure activities, 2022



- The Western Cape attracted the most tourists (47.4%) who indicated adventure activities as one of their top activities of choice. In addition, adventure ranked 4th after eating out, shopping, and beach experiences. These figures can be observed in Figures 4 and 6.
- Between January to December 2022, a total of 911 respondents to the regional visitor tracking surveys conducted by various tourism offices in the Western Cape indicated they had visited and engaged in adventure experiences.
- By region, 51.3% of tourists to the Overberg and 38.0% participated in adventure activities in the Weskus region, as shown in Figure 5.

Figure 6: % Western Cape activities ranking, 2022



Source: Wesgro Visitor Tracking Survey (2022); South African Tourism (2022)

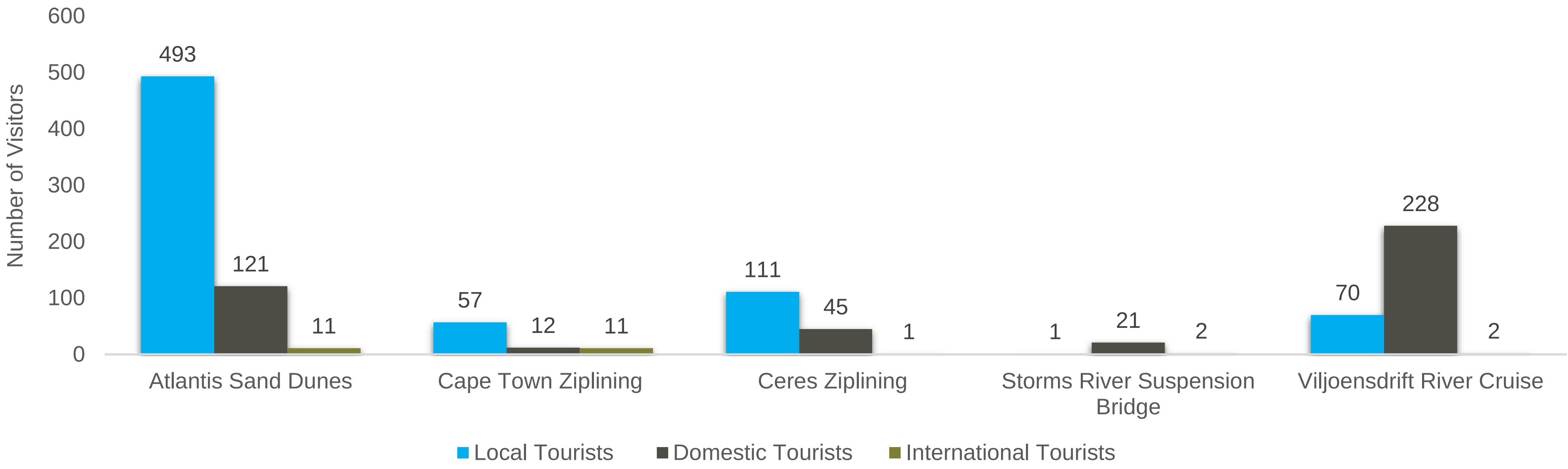
WESGRO cape town & western cape research

7. Adventure tourism travel market to the Western Cape

The following four sections represent visitors' travel movements to selected adventure tourism attractions through mobile location data insights from January to December 2022.

- The Atlantis Sand Dunes attracted the largest sample of visitors, of whom 493 were locals and 121 were domestic visitors. This was followed by the Viljoensdrift River Cruise with 228 domestic visitors, and Ceres Ziplining which attracted 111 local visitors.
- Cape Town Ziplining and the Storms River Suspension Bridge received the lowest number of visitors. Some 57 local visitors visited Cape Town Ziplining and 21 domestic visitors to the Storms River Suspension Bridge.
- According to Figure 7, locals were more interested in adventure activities at the Atlantis Sand Dunes. On the other hand, domestic visitors preferred adventure activities at the Viljoensdrift River Cruise and Atlantis Sand Dunes.

Figure 7: Tourists to selected Western Cape's adventure attractions, Jan-Dec 2022



Source: ROVE (2023)

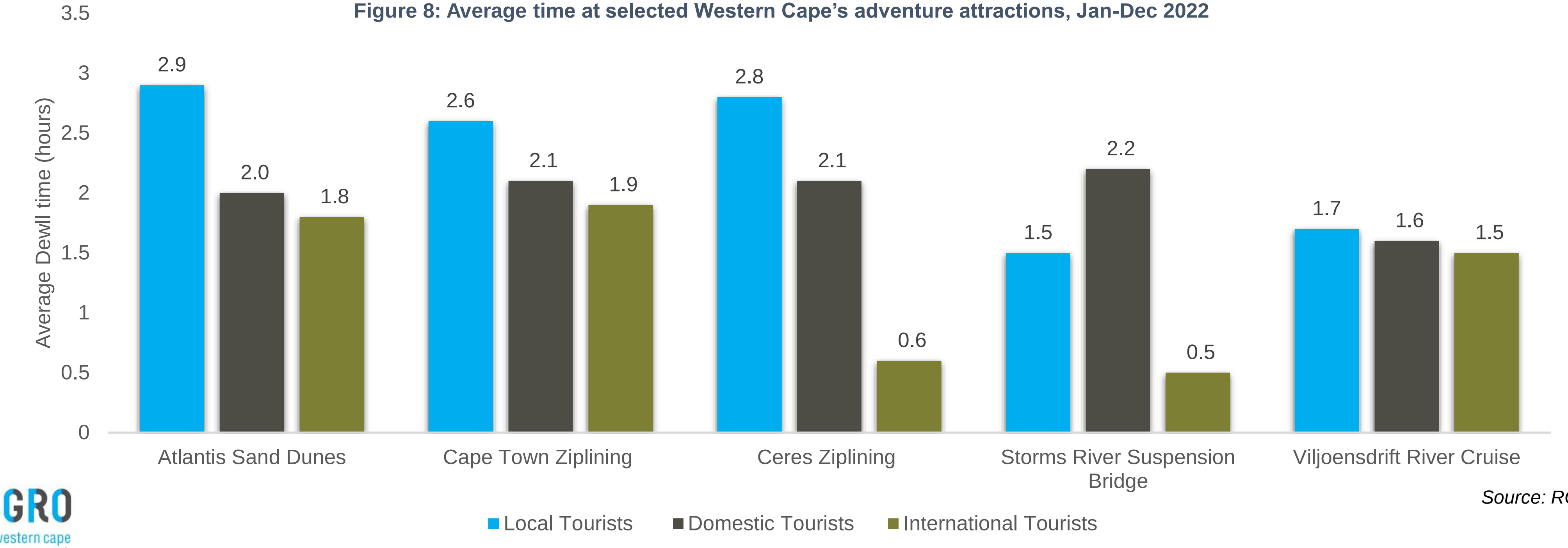
7. Adventure tourism travel market to the Western Cape

- The mobile location data collected for the year 2022, between January and December, show that Ceres Ziplining, Atlantis Sand Dunes, and Cape Town Ziplining were the most popular tourist attractions among local and domestic visitors. During this period, these attractions were visited by a large number of visitors, who spent an average of 2.1-2.9 hours at each location.

- Furthermore, the data indicates that international visitors, who also enjoyed these attractions, spent an average of 1.9 hours at the Cape Town Ziplining, 1.8 hours at the Atlantis Sand Dunes, and 1.5 hours at the Viljoensdrift River Cruise. This information is useful for tourists who want to plan their itinerary and budget their time accordingly

- Additionally, it is worth noting that these attractions offer a range of activities that cater to visitors of all ages. Visitors can enjoy breathtaking views while ziplining, sandboarding, or cruising on the river, and take part in other exciting activities.

Figure 8: Average time at selected Western Cape's adventure attractions, Jan-Dec 2022



Source: ROVE (2023)

wesgro cape town & western cape research

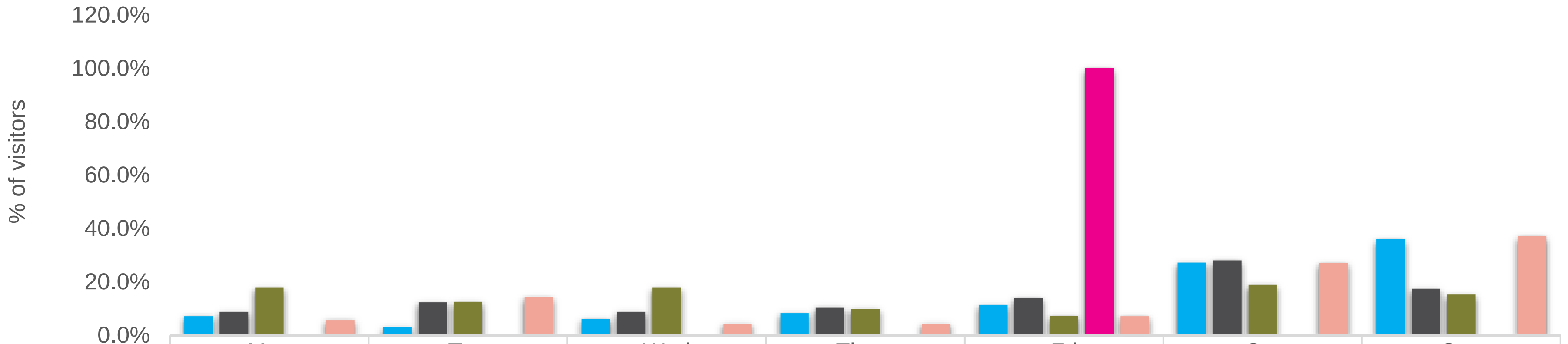
7. Adventure tourism travel market to the Western Cape

- According to the data presented in Figure 9, it can be observed that the weekends, specifically Saturday and Sunday, were the most popular days for locals to participate in adventure activities at the Atlantis Sand Dunes, Cape Town Ziplining, and Viljiensdrift River Cruise. This trend was also observed among the domestic market, with the Atlantis Dunes, Cape Town Ziplining, Ceres Ziplining, and Viljoensdrift River Cruise being the most popular adventure activities over the weekend.

- On the other hand, the international market showed a different trend, as seen in Figure 11. However, it is important to note that the sample size for the international market was relatively small. Nonetheless, it was observed that the international market visited Cape Town and Ceres Ziplining on Mondays, the Viljoensdrift River Cruise on Tuesdays, the Storms River Suspension Bridge on Wednesdays and Saturdays, and the Atlantis Sand Dune was most visited over the weekend.

- Overall, the data suggests that weekends are the most popular time for locals and domestic tourists to engage in adventure activities, while the international market seems to have a more varied schedule.

Figure 9: Popular days of the week for visiting selected adventure attractions by local visitors, Jan-Dec 2022

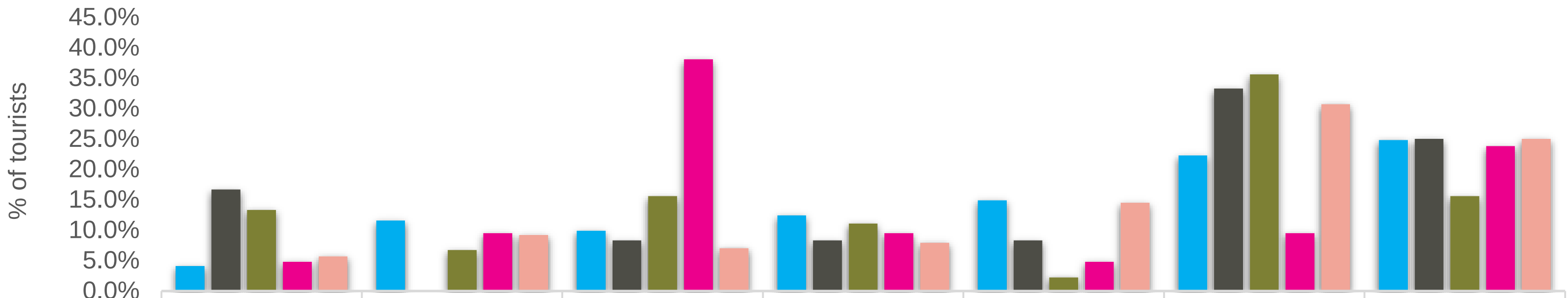


	Mon	Tue	Wed	Thurs	Fri	Sat	Sun
Atlantis Sand Dunes	7.1%	3.0%	6.1%	8.3%	11.4%	27.2%	36.0%
Cape Town Ziplining	8.8%	12.3%	8.8%	10.5%	14.0%	28.1%	17.5%
Ceres Ziplining	18.0%	12.6%	18.0%	9.9%	7.2%	18.9%	15.3%
Storms River Suspension Bridge	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%
Viljoensdrift River Cruise	5.7%	14.3%	4.3%	4.3%	7.1%	27.1%	37.1%

Source: ROVE (2023)

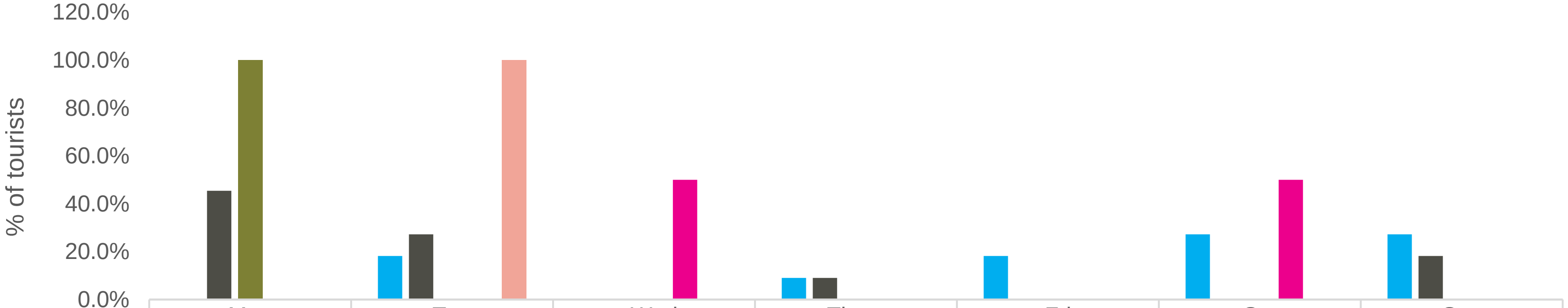
7. Adventure tourism travel market to the Western Cape

Figure 10: Popular days of the week for visiting selected adventure attractions by domestic visitors, Jan-Dec 2022



	Mon	Tue	Wed	Thurs	Fri	Sat	Sun
Atlantis Sand Dunes	4.1%	11.6%	9.9%	12.4%	14.9%	22.3%	24.8%
Cape Town Ziplining	16.7%	0.0%	8.3%	8.3%	8.3%	33.3%	25.0%
Ceres Ziplining	13.3%	6.7%	15.6%	11.1%	2.2%	35.6%	15.6%
Storms River Suspension Bridge	4.8%	9.5%	38.1%	9.5%	4.8%	9.5%	23.8%
Viljoensdrift River Cruise	5.7%	9.2%	7.0%	7.9%	14.5%	30.7%	25.0%

Figure 11: Popular days of the week for visiting selected adventure attractions by international visitors, Jan-Dec 2022



	Mon	Tue	Wed	Thurs	Fri	Sat	Sun
Atlantis Sand Dunes	0.0%	18.2%	0.0%	9.1%	18.2%	27.3%	27.3%
Cape Town Ziplining	45.5%	27.3%	0.0%	9.1%	0.0%	0.0%	18.2%
Ceres Ziplining	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Storms River Suspension Bridge	0.0%	0.0%	50.0%	0.0%	0.0%	50.0%	0.0%
Viljoensdrift River Cruise	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Source: ROVE (2023)

8. Types of adventure tourism and activities in the Western Cape

Adventure tourism offers a unique and thrilling travel experience for those seeking a little excitement. It can be broadly categorized into two types: soft adventure tourism and hard adventure tourism. Soft adventure tourism typically involves safe and easy-to-learn activities that do not require prior experience or special skills, such as hiking, cycling, or wildlife safaris. On the other hand, hard adventure tourism is for thrill-seekers who are willing to take on greater risks and challenges.

The Western Cape province is a popular destination for adventure tourism, offering a wide range of activities for both soft and hard adventure enthusiasts. Table 2 lists some of the exciting adventure activities available to tourists in the Western Cape. The province's diverse landscape and natural beauty make it an ideal destination for adventure tourists looking to challenge themselves while enjoying the great outdoors.

Table 12: Soft and hard adventure activities

Niche market	Activity	Niche market	Activity
Land-based activities	Game capture experiences		Sandboarding
	Animal viewing		Mountain rides
	Animal interaction		Bird watching
	Sandboarding		Mountain biking
	Skateboarding	Air-based activities	Hot air ballooning
	Kloofing		Paragliding
	Coasteering		Skydiving
	Spelunking		Helicopter scenic flight
	Tunnel tour		Tandem paragliding experience
	Bungee		Ziplining
	Quad biking	Water-based adventure activities	Snorkelling
	4x4		Marine big 5 tour
	Abseiling		Scenic day cruise
	Rock sliding		Surfing
	Walking safaris		Water skiing
	Stargazing		SUP
	Classic sandboarding		Guided kayak tour
	“High 5“ stargazing		Seal snorkelling
	Segway experience		Guided shore dives
	Vineyard rides experiences		Fishing
	Wildlife watching		Whale watching
	4x4 coastal drive		Shark cage diving
	4x4 offroad tours		Speedboat tour
	E-bike tour/safari tours		Guided ocean adventure tours
	Horseback safari		Crocodile cage dive
	Hiking and trekking		River rafting

Source: CBI (2023); ActivityHub 2023; SATSA (2023)

9. Potential adventure tourism travel market to the Western Cape

Consumer studies have shown that it is crucial to comprehend important factors such as the socio-demographic background and travel motivations of tourists to create and promote successful tourism experiences. According to South African Tourism reports on unlocking key markets indicate that South Africa's leading adventure tourism markets are the UK and the USA, which Western Cape destination management organisations (DMOs) and tourism operators can use to entice and influence adventure tourists to visit the province.

Table 13: Potential adventure tourism markets to Western Cape

UK	Aspects	Profile
	Average age	25-40 years old
	Average spending behaviour	±R24 600
	Group Size	Solo traveller (*62% in 2022*)
	Travel package preferences	Book trips independently
	Activities of choice/travel needs	Low-risk adventures
	Preferred travel destination	Western Cape (*54% in 2022*)
	Travel decision making based on / Sources of information	Word of mouth recommendations/referral and experiences
	Perceptions of SA	Positive: Value for money
		Negative: Concern for personal safety
	Average length of stay	18 days in South Africa
	Repeat visitor	Repeat traveller
USA	**Aspects**	**Profile**
	Average age	25-40 and 40+ years old
	Average spending behaviour	R33 500
	Group Size	Solo traveller
	Travel package preferences	Book trips independently
	Activities of choice/travel needs	Adventure
	Preferred travel destination	Western Cape (*44% in 2022*)
	Travel decision making based on / Sources of information	Recommendations by friends or family
	Perceptions of SA	Positive: Value for money
	Average length of stay	12 days in South Africa
	Repeat visitor	Mostly first-timers

Source: South African Tourism (2023)

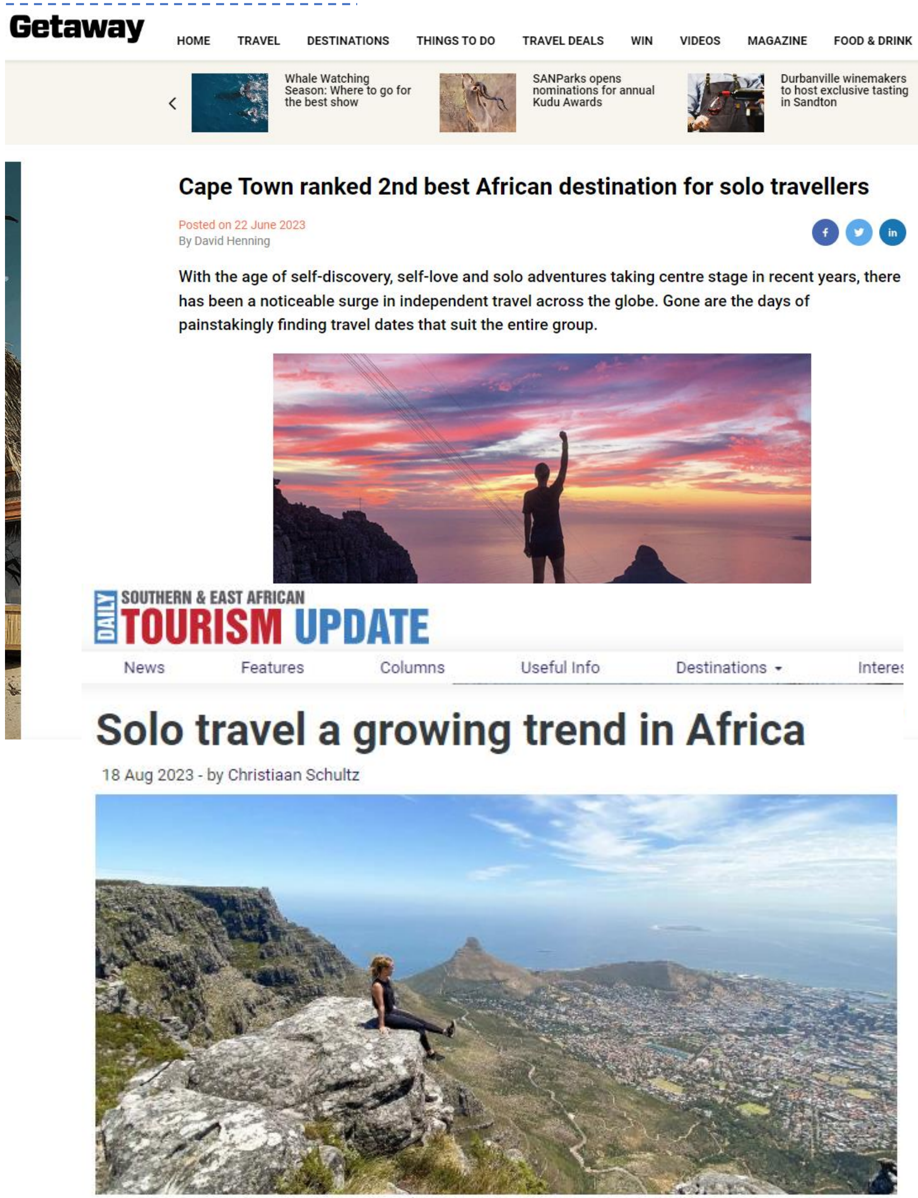
10. Types of travellers that will influence adventure tourism in the Western Cape

10.1 Solo traveller

- Solo travel is a form of adventure tourism that has gained popularity in recent years. A solo traveler is defined as someone who chooses to travel alone, without the company of friends or family.
- They are driven by a desire to explore the world, experience new cultures, and challenge themselves by stepping out of their comfort zone. Solo travellers are motivated by a variety of factors, including the opportunity to meet new people, find solitude, and engage in self-reflection. For some, solo travel is about ticking items off their bucket list, while for others, it is a chance to escape their daily routine and gain a fresh perspective on life.
- Online platforms have become an essential tool for solo travellers, providing a wealth of information and resources to help them plan and book their trips. From flight and hotel reservations to itinerary planning and local recommendations, these platforms play a vital role in the decision-making process for solo travellers.
- Despite the misconception that solo travel is only for those on a tight budget, solo travellers tend to have a medium to a high level of spending power. They are willing to invest in experiences that enrich their lives and create lasting memories.

10.2 Responsible traveller

- A responsible traveller is someone conscious of the impact of their travel choices and makes decisions that prioritise environmental sustainability, social responsibility, and cultural preservation. They seek out eco-friendly and low-impact forms of transportation, accommodation, and activities that promote sustainable tourism practices and minimize negative environmental impacts.
- A responsible traveller also recognises the importance of respecting and preserving local cultures, customs, and traditions, and aims to contribute to the local economy and community in a positive way. By adopting sustainable travel practices, they play a crucial role in safeguarding the environment, biodiversity, and cultural heritage of the places they visit.


Getaway

HOME TRAVEL DESTINATIONS THINGS TO DO TRAVEL DEALS WIN VIDEOS MAGAZINE FOOD & DRINK

Whale Watching Season: Where to go for the best show

SANParks opens nominations for annual Kudu Awards

Durbanville winemakers to host exclusive tasting in Sandton

Cape Town ranked 2nd best African destination for solo travellers

Posted on 22 June 2023

By David Henning

With the age of self-discovery, self-love and solo adventures taking centre stage in recent years, there has been a noticeable surge in independent travel across the globe. Gone are the days of painstakingly finding travel dates that suit the entire group.

DAILY SOUTHERN & EAST AFRICAN TOURISM UPDATE

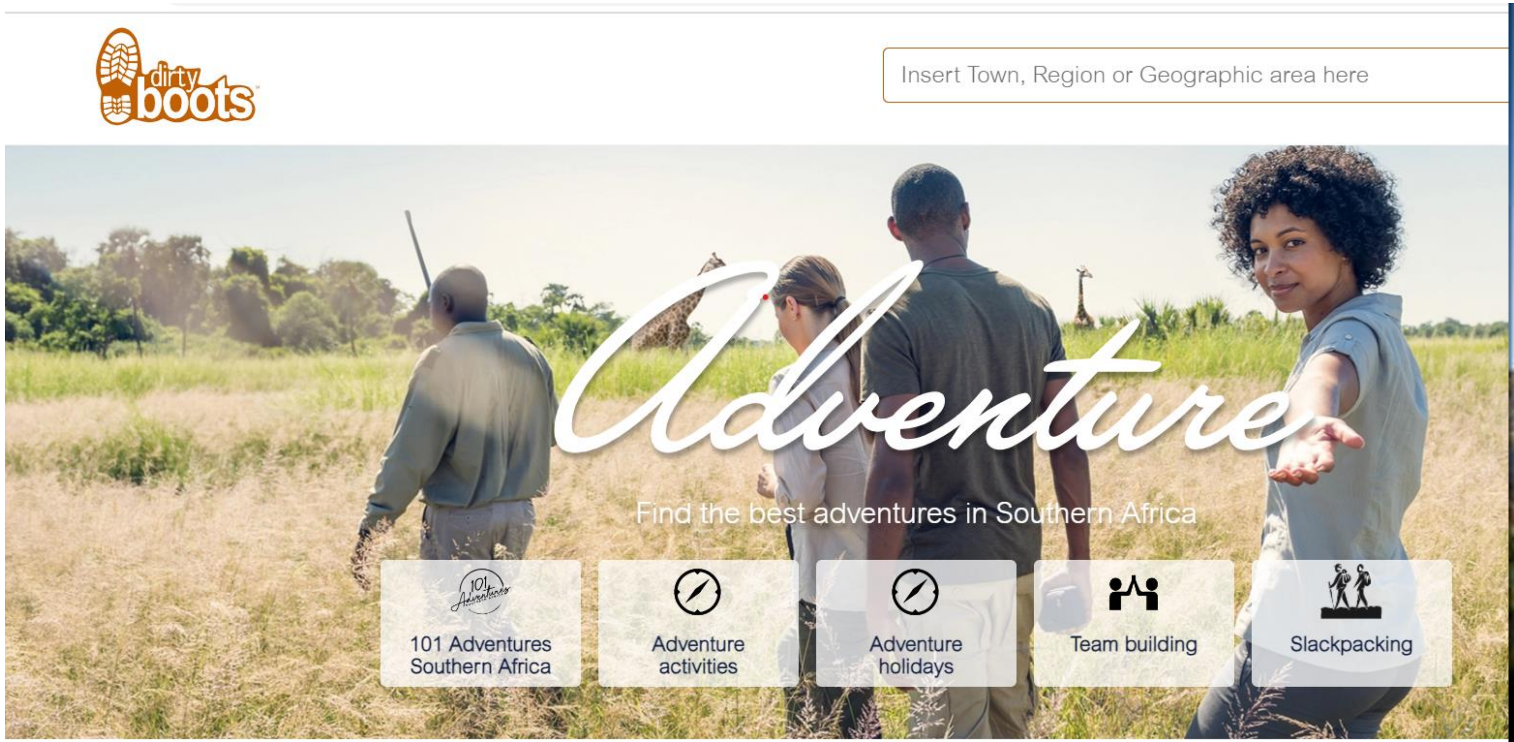
News Features Columns Useful Info Destinations

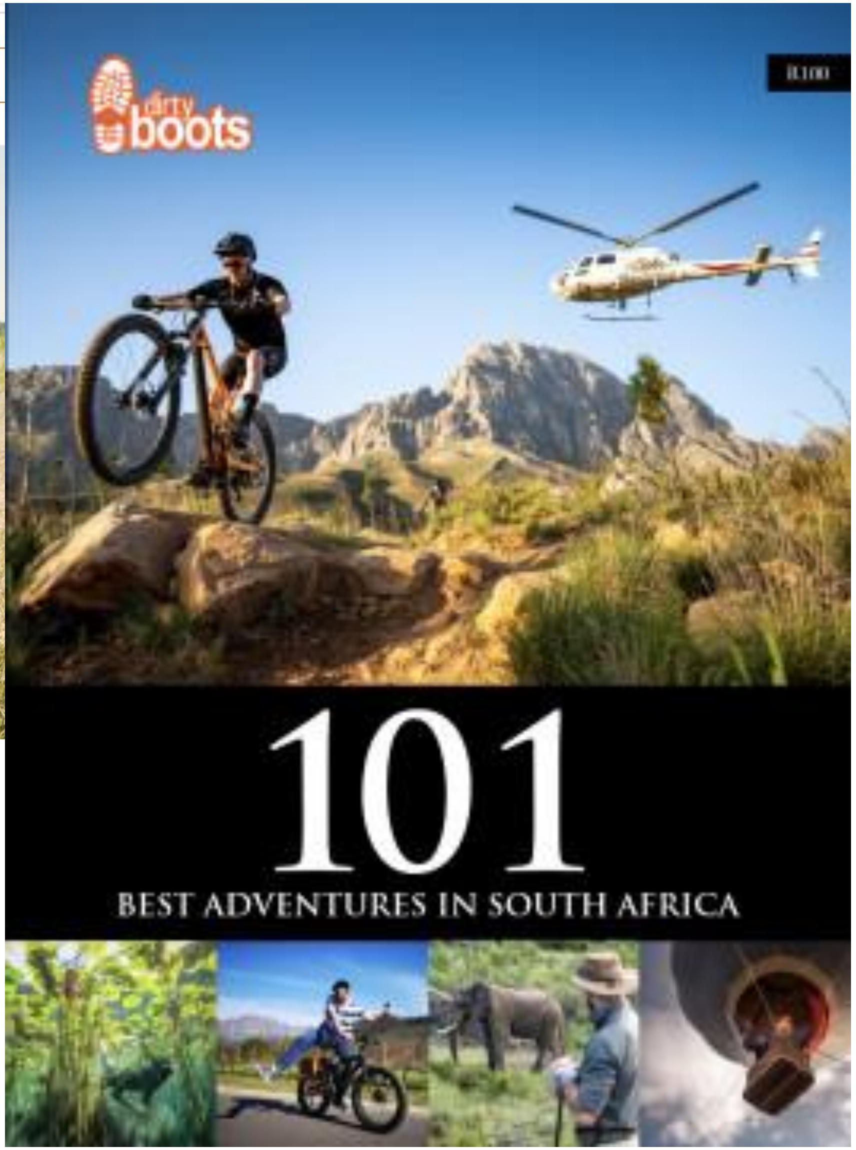
Solo travel a growing trend in Africa

18 Aug 2023 - by Christiaan Schultz

Source: Gateaway (2023); Tourism Update (2023); CBI (2023); Booking.com (2023); Global Sustainability Tourism Council (2022).

11. Adventure tourism in the Western Cape: Resource





The Dirty Boots Adventure Guide 8th edition was released in 2023 in an A4 magazine-style format. It provides information about various adventures in Cape Town and the Western Cape. The guide features popular destinations such as Cape Town, Hermanus, Knysna, Gansbaai, Stellenbosch, Simon's Town, Plettenberg Bay, and many more.

In addition, the Dirty Boots website makes it easy for tech-savvy individuals to access adventure information when planning their trips to the province.

Source: Dirty Boots (2023)

12. Gazing into the future: Marketing and promotion

- To boost the popularity of adventure tourism in the Western Cape region, it is crucial to gain a comprehensive understanding of the various factors that can impact tourists' decisions to participate in adventure tourism experiences. By identifying and analyzing these influential aspects, adventure tourism operators and businesses can develop and offer individually tailored or packaged adventure experiences that cater to the specific needs and preferences of their target audience. Some of the key factors that can influence tourists' decisions to engage in adventure tourism experiences include the following:

    1. Socio-economic background and spending power of potential markets
    2. Cost related to adventure activities or packed adventure experiences
    3. The booking and travel costs (e.g., accommodation, airline tickets)
    4. Marketing that speaks and appeals to tourists’ preferences or travel motivations.

- In Europe, creativity is celebrated as a powerful force for innovation and growth. According to the Valuegraphics Global Value Guide, it is consistently ranked among the top 10 values that Europeans hold dear. This emphasis on creativity can be seen in various aspects of European life, from the arts and culture to business and technology. It presents a remarkable opportunity for Destination Marketing Organizations (DMOs) and other key stakeholders to create experiences and marketing strategies that align with these values and inspire European travellers.

- Similarly, in North America, people place great value on health and well-being. From maintaining healthy eating habits to prioritising mental wellness, there is a strong focus on achieving overall wellness. The Western Cape has emerged as a destination that offers wellness and health tourism experiences, catering to the growing demand for wellness-focused travel experiences. With its awe-inspiring natural beauty, the Western Cape is an ideal destination for travellers seeking to rejuvenate their minds and bodies.

Source: VALUEGRAPHICS Research Company (s.a); World Tourism Organization (2014)

13. List of Sources

- ActivtyHub. 2023. *Adventure and Adrenaline Activities in the Western Cape*.
- Alied Market Research. 2023. *Adventure Tourism Market*. May 2023.
- CBI (Centre for the Promotion of Imports from Developing Countries). 2023. *The European market potential for adventure tourism*. January 2023
- CBI (Centre for the Promotion of Imports from Developing Countries). 2023. *What are the opportunities for solo tourism from Europe*?. January 2018
- Gateaway. 2023. *Cape Town ranked 2nd best African destination for solo travellers*. 22 June 2023.
- Geldenhuys. 2018. *A sustainable management framework for marine adventure tourism products.* North-West University Thesis.
- ROVE. 2023. *Mobile data insights on adventure points of interest*. January to December 2022.
- South African Tourism 2022. *Tourism performance annual 2022 report*. January – December 2022.
- South African Tourism. 2023. *Unlocking the UK market*. 1st January to 31st December 2023.
- South African Tourism. 2023. *Unlocking the USA market*. 1st January to 31st December 2023.
- STATSA (Southern Africa Tourism Services Association). 2023. *Adventure tourism self-regulation roadmap*.
- Tourism Update. 2023.. *Solo travel a growing trend in Africa*. 18 August 2023.
- VALUEGRAPHICS Research Company. s.a. *Global Values Guide*.
- Wesgro Visitor Tracking Survey 2022. *Western Cape Regional Tourism Trends Insights*. January – December 2022.
- Western Cape Government Department of Economic Development and Tourism. 2023. *Tourism Blueprint 2030*.
- World Bank Group. 2022. *Destination management handbook: A guideline to the planning and implementation of destination management.*
- World Tourism Organization (UNWTO). 2014. *AM Reports, Volume nine – Global Report on Adventure Tourism.*

Appendix: ROVE Mobile Location Data

WESGRO
cape town & western cape
research

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:

- 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:

- 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:

- 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?

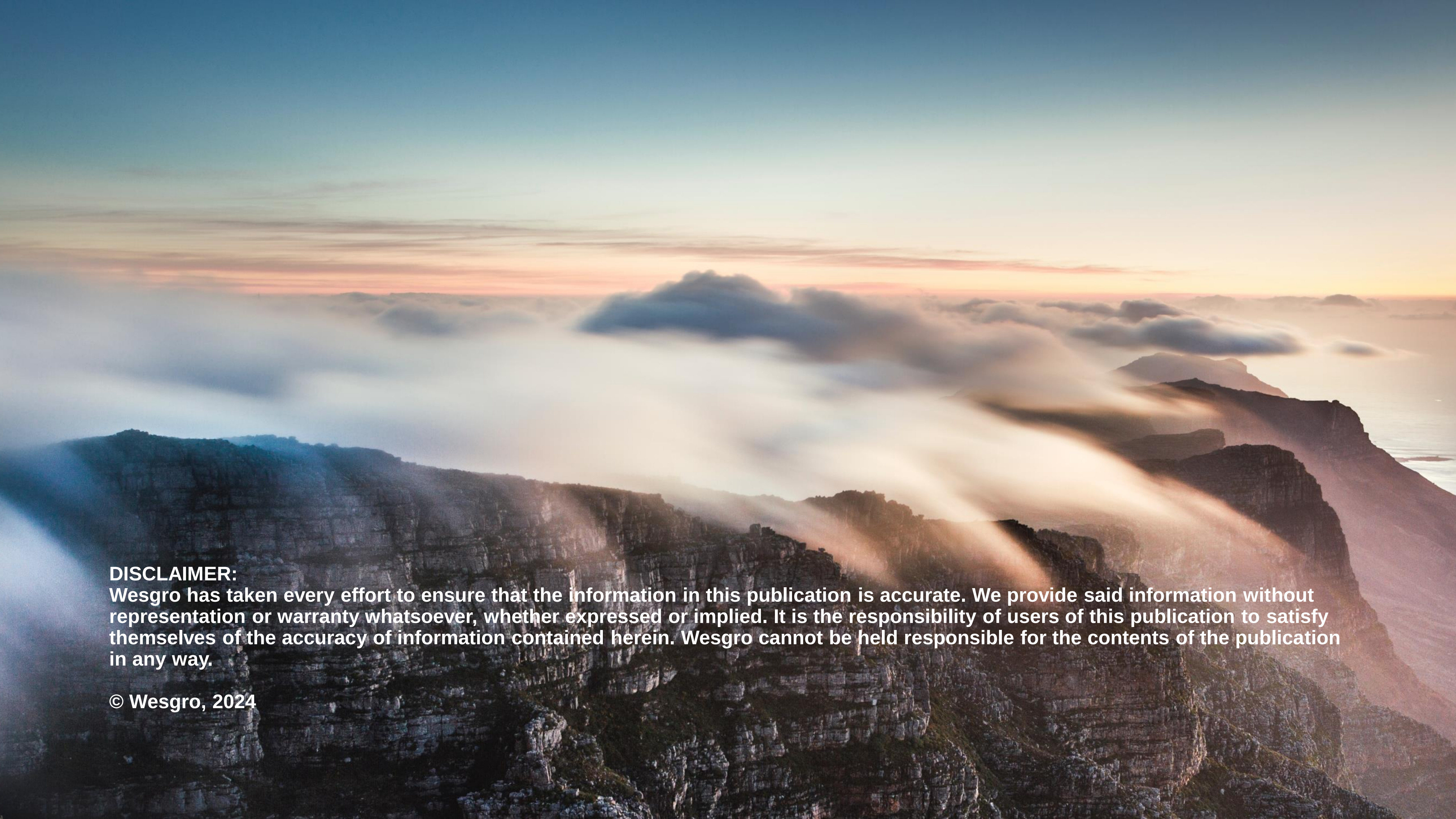
- **Local Tourists:** Tourists who reside within the same region.
- **Domestic Tourists:** Tourists who reside in South Africa outside of the Western Cape
- **International Tourists:** Tourists who reside outside of South Africa

Source: Rove, 2024

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.

Source: Rove, 2024



DISCLAIMER:
Wesgro has taken every effort to ensure that the information in this publication is accurate. We provide said information without representation or warranty whatsoever, whether expressed or implied. It is the responsibility of users of this publication to satisfy themselves of the accuracy of information contained herein. Wesgro cannot be held responsible for the contents of the publication in any way.