

Tourism Research Overview October 2023

Cape Town & the Western Cape

WESGRO

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

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Key Findings

Tourism growth in the Western Cape is gaining solid momentum and showing strong signs of a bumper summer season. Cape Town International Airport (CTIA) reflected a notable year-on-year growth with passengers through the international terminal surpassing the 2 million mark between January and October 2023. Highlights of the overall tourism performance in October 2023 YTD are outlined below:

- Two-way passengers through the CTIA **international terminal** remained steady between Jan and Oct 2023, surpassing 2 million passengers YTD, exceeding pre-pandemic levels and growing by 57% vs. Jan – Oct 2022. *(Data Source: ACSA, 2023)*
- International route highlights include **Air France** returning with a seasonal non-stop service between Paris and Cape Town as from end of October, operating three flights a week until end of March, and increasing to five flights a week between 17 January 2024 and 27 February 2024. *(Data Source: Cape Town Air Access, 2023)*
- On the domestic front, over 5.5 million two-way passengers passed through the CTIA **domestic terminal** between Jan and Oct 2023 YTD, increasing by 15% when compared to Jan – Oct 2022. Recovery in the month of October 2023 stands at 90% against Oct 2019. Two-way passengers through George Airport reached 645,172 between Jan and Oct 2023, representing a 3% year-on-year increase vs. Jan - Oct 2022. *(Data Source: ACSA, 2023)*
- Between January and October 2023, Cape Town recorded a total of 700,044 tourist arrivals via air, of which 89% originated from overseas markets and 11% from the African continent. The overseas tourist arrivals (via air) remain at full recovery in October 2023 YTD vs. Jan – Oct 2019. The year-to-date total of air arrivals from Africa fully recovered for the first time in October 2023, when compared to the period Jan – Oct 2019. *(Data Source: StatsSA, 2023)*
- As at October 2023, the cumulative total of USA tourist arrivals to Cape Town (via air) exceeded the UK and led as the top air market to Cape Town between January and October 2023 YTD, with the UK 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 October 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 - Oct). These markets included USA (144%), UK (103%), Germany (102%), Netherlands (111%), Italy (109%), India (104%), Canada (103%) and Zimbabwe (186%). *(Data Source: StatsSA, 2023)*
- Footfall to 35 participating attractions across the six regions of the Western Cape recorded a total of 399,308 visitors in October 2023, a 21% growth in the number of visitors when compared to October 2022. The top 5 highest year-on-year growth rates in October 2023 were recorded for Anysberg Nature Reserve (867%), Stony Point Eco Venue (109%), Walker Bay Nature Reserve (65%), Table Mountain National Park: Boulders (47%) and Table Mountain National Park: Cape of Good Hope (31%). *(Data Source: Local Tourism Offices (LTOs) & Attractions, 2023)*
- According to the Tourism Sentiment Index rankings for Q3 2023, the Western Cape had a Tourism Sentiment Score® of 24.6. This places the Western Cape amongst the top regions in the world with a global rank of #14. The top contributors to the Western Cape's overall performance were Winery & Vineyards (21%), Restaurants & Dining (16%) and Beaches (12%). Winery & Vineyards ranked amongst the top destinations in the world with a global rank of #6 this quarter. *(Data Source: TSI, 2023)*

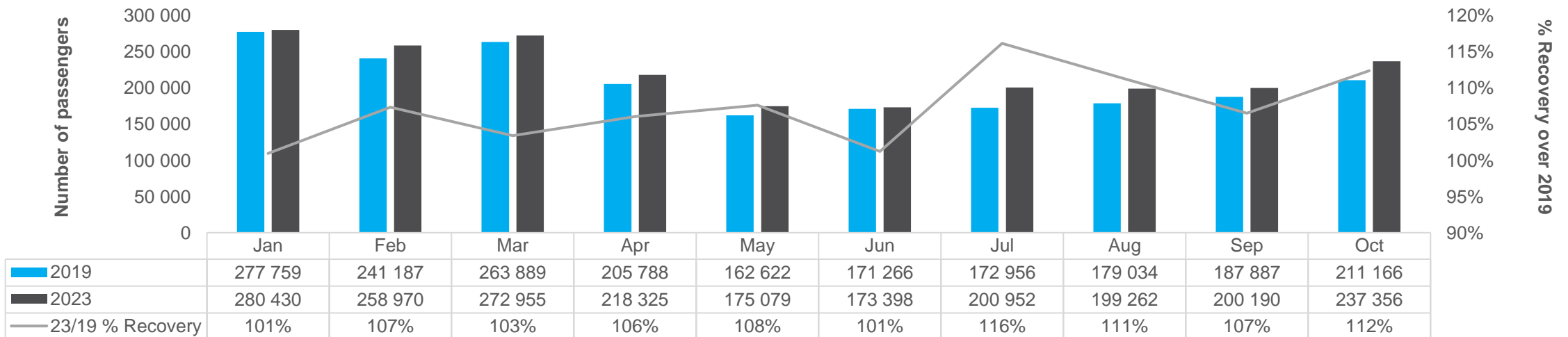
International passenger recovery between Jan and Oct 2023 remains above pre-pandemic levels and reached 2.2 million YTD.

Year/Month	2019	2020	2021	2022	2023 ytd	2023					
						May	Jun	Jul	Aug	Sept	Oct
Two-way passengers	2 606 398	810 811	525 441	1 895 975	2 216 917	175 079	173 398	200 952	199 262	200 190	237 356
YoY growth percentage*	1%	-69%	-35%	261%	57%	46%	39%	34%	34%	31%	35%

* Growth compared to the same period in the previous year

Source: ACSA, 2023

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



Source: ACSA, 2023

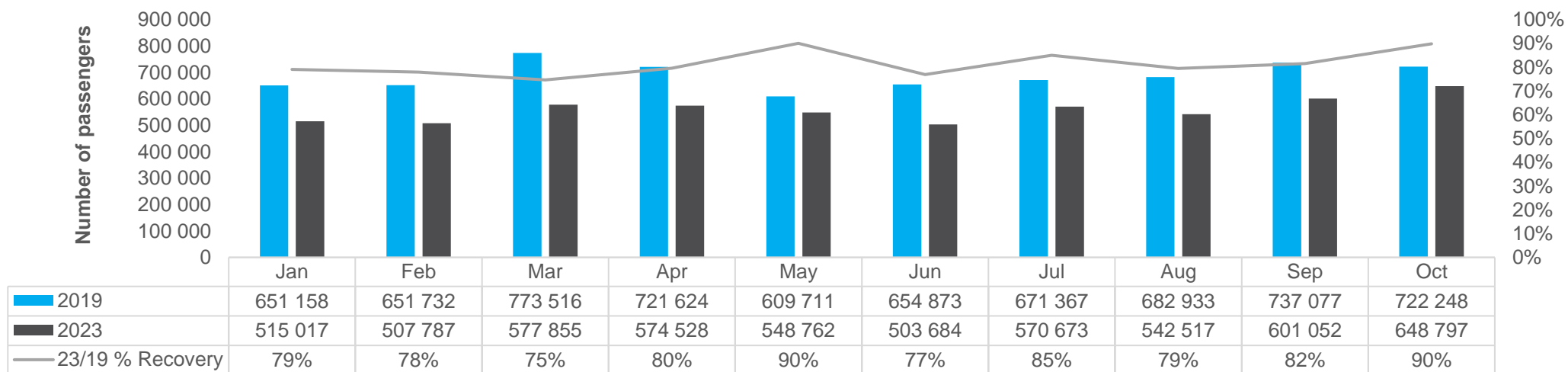
Domestic passenger recovery stands at 90% in Oct 2023

Year/Month	2019	2020	2021	2022	2023 ytd	2023					
						May	Jun	Jul	Aug	Sept	Oct
Two-way passengers	8 363 307	3 167 542	4 221 365	5 960 826	5 590 672	548 762	503 684	570 673	542 517	601 052	648 797
YoY growth percentage*	2%	-62%	33%	41%	15%	9%	24%	25%	18%	24%	23%

* Growth compared to the same period in the previous year

Source: ACSA, 2023

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



Source: ACSA, 2023

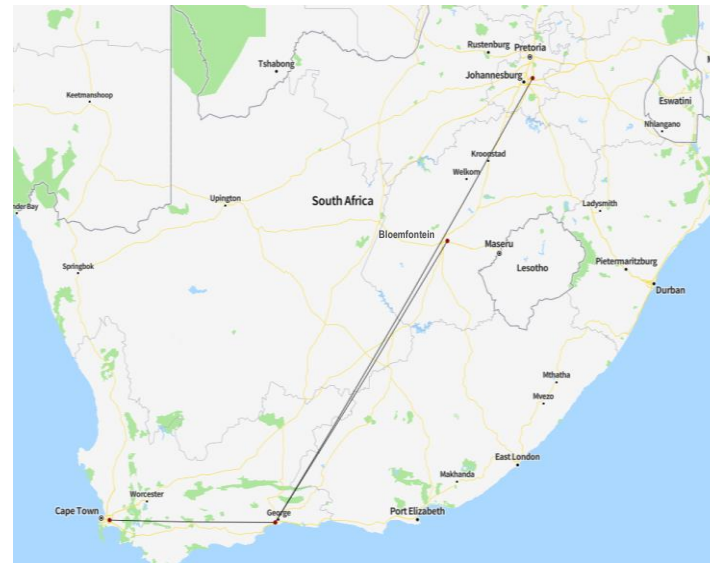
George Airport two-way passengers reached 645,172 between Jan and Oct 2023 YTD, registering a 3% increase vs. Jan - Oct 2022.

Year/Month	2019	2020	2021	2022	2023 ytd	2023					
						May	Jun	Jul	Aug	Sept	Oct
Two-way passengers	840 804	346 223	539 637	747 848	645 172	63 532	58 312	64 346	62 082	64 428	68 850
YoY growth percentage*	0%	-59%	56%	39%	3%	3%	4%	2%	2%	5%	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 Dec 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

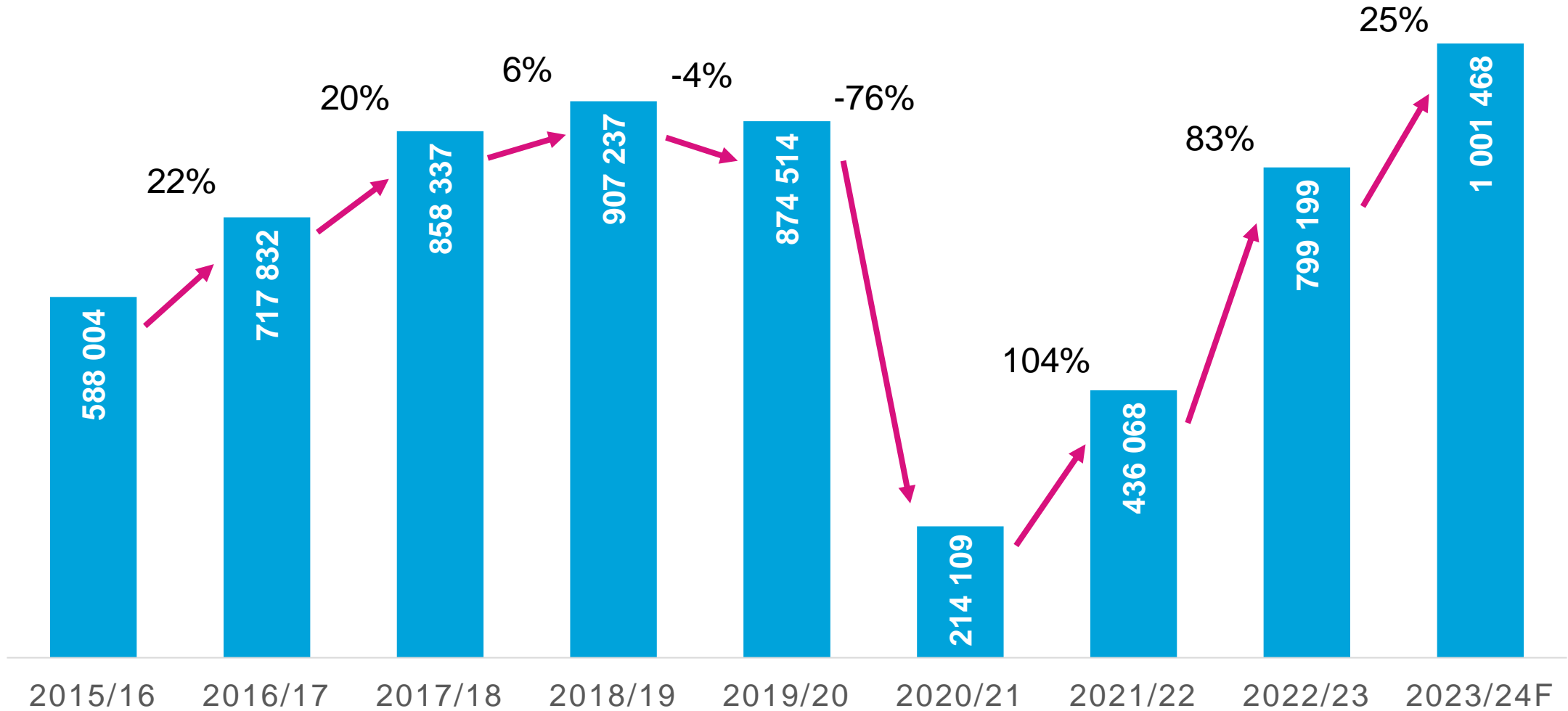
Source: Cape Town Air Access, 2023

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



Source: Cape Town Air Access, 2023

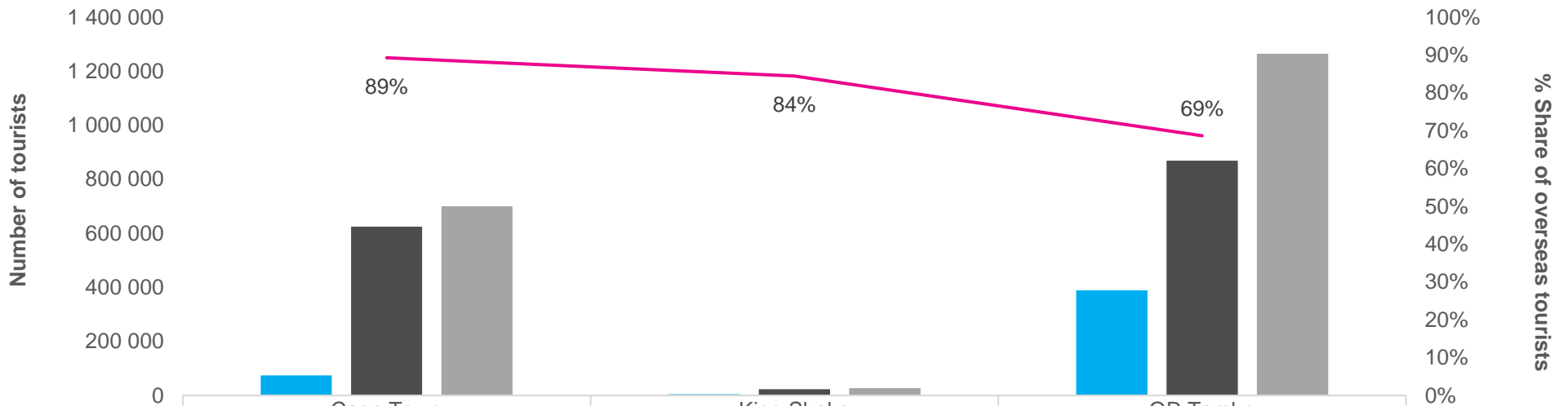
Increase in inbound international seat capacity since 2015 for CPT, Nov-Mar



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

Between January and October 2023, Cape Town recorded a total of **700,044** tourist arrivals via air, of which 89% originated from overseas markets and 11% from the African continent. Total tourist arrivals as well as both the overseas and Africa air markets to Cape Town stands at **full recovery** in October 2023 YTD vs. Jan – Oct 2019.

Tourist Arrivals by South African Airport, Jan – Oct 2023



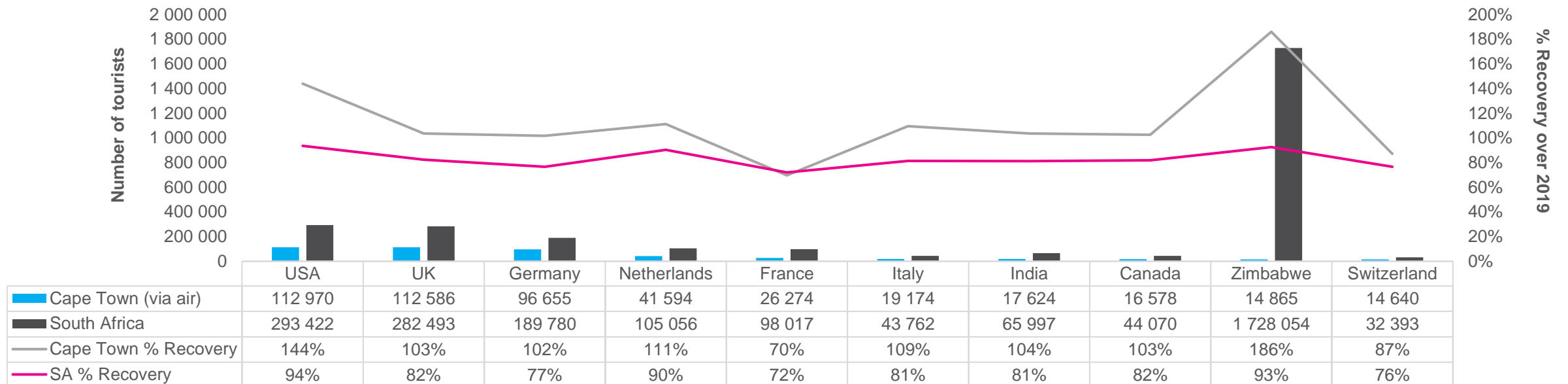
	Cape Town	King Shaka	OR Tambo
Africa Tourist Arrivals	73 964	4 155	389 522
Overseas Tourist Arrivals	625 110	22 758	869 366
Total Tourist Arrivals	700 044	26 933	1 265 640
Overseas % Share of Total Tourists	89%	84%	69%

Source: StatsSA, 2023

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

- As at October 2023, the cumulative total of US tourist arrivals to Cape Town (via air) surpassed the UK and led as the top air market to Cape Town between January and October 2023 YTD, with the UK a very close second, followed by Germany, the 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 October 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 - Oct). These markets included USA (144%), UK (103%), Germany (102%), Netherlands (111%), Italy (109%), India (104%), Canada (103%) and Zimbabwe (186%).

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



Source: StatsSA, 2023

Performance of Western Cape Attractions: October 2023

- Footfall to 35 participating attractions across the six regions of the Western Cape recorded a total of **399,308** visitors in October 2023, a **21% growth in the number of visitors** when compared to October 2022.
- The top 5 highest year-on-year growth rates in October 2023 were recorded for:
 - Anysberg Nature Reserve (867%)
 - Stony Point Eco Venue (109%)
 - Walker Bay Nature Reserve (65%)
 - Table Mountain National Park: Boulders (47%)
 - Table Mountain National Park: Cape of Good Hope (31%)

Sources: LTO's, and Attractions, 2023

Western Cape Attractions	Oct-22	Oct-23	Oct 22/23 % Change
Cape Town			
Kirstenbosch National Botanical Garden	60 905	66 021	8%
Table Mountain Aerial Cableway	82 298	103 465	26%
Table Mountain National Park: Boulders	52 178	76 815	47%
Table Mountain National Park: Cape of Good Hope	69 487	91 363	31%
Robben Island	25 459	24 273	-5%
Overberg			
Cape Agulhas Lighthouse	1 857	1 488	-20%
Shipwreck Museum	333	155	-53%
Panthera Africa	225	157	-30%
Grootvadersbosch Nature Reserve	855	599	-30%
Marloth Nature Reserve	573	639	12%
The Whale Trail	356	348	-2%
Walker Bay Nature Reserve	1 534	2 533	65%
Stony Point Eco Venue	82	171	109%
De Hoop Nature Reserve	1 842	2 358	28%
De Mond Nature Reserve	316	13	-96%
Kogelberg Nature Reserve	643	779	21%
Garden Route & Klein Karoo			
Goukamma Nature Reserve	317	173	-45%
Keurbooms River Nature Reserve	9 914	11 050	11%
Robberg Nature Reserve	9 416	9 604	2%
Weskus			
!Khwa ttu	1 857	1 852	-0,3%
Cederberg-Algeria Nature Reserve	1 820	796	-56%
Cederberg-Kliphuis Nature Reserve	252	112	-56%
Groot Winterhoek Wilderness Area	390	173	-56%
Matjiesrivier Nature Reserve	1 073	911	-15%
Rocherpan Nature Reserve	135	172	27%
Winelands			
Protea Tractor Trip	712	232	-67%
Birds Paradise	849	417	-51%
Viljoensdrift River Cruise	1877	585	-69%
Assegaaibosch Nature Reserve	506	118	-77%
Hottentots Holland Nature Reserve	339	144	-58%
Limietberg Nature Reserve	1 393	1 220	-12%
Vrolijkheid Nature Reserve	733	355	-52%
Cape Karoo			
Anysberg Nature Reserve	9	87	867%
Gamkaberg Nature Reserve	161	91	-43%
Swartberg Nature Reserve	40	39	-3%
Total	330 736	399 308	21%

Visitor Trends Mobile Location Data Insights

October 2023

Western Cape Mobile Location Data Insights

What is mobile location data?

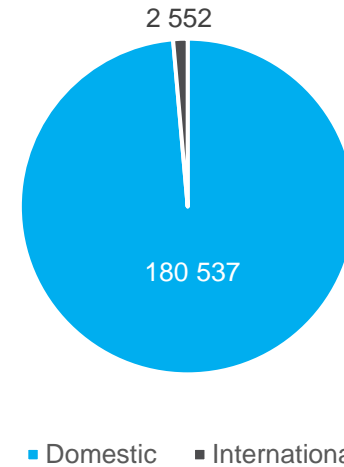
- Geo or spatial data from smartphones. When a user installs an app, they are often asked to share their location data with the company which provides the app, and other companies who are partners with the app publisher.
- Users can “opt in” to location sharing (or choose not to “opt in”). When they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

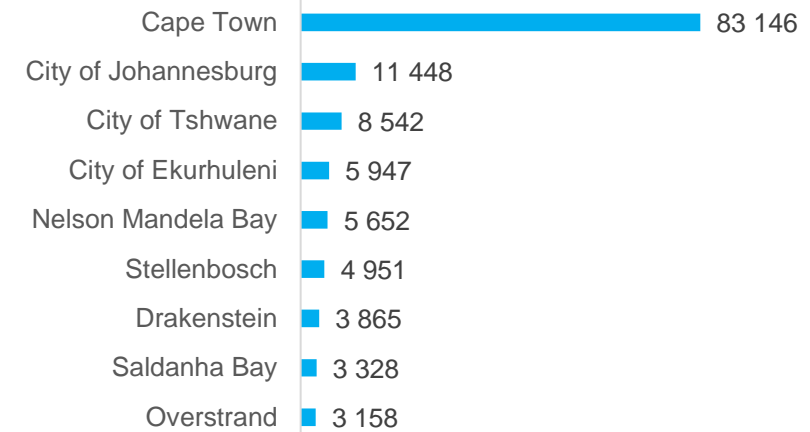
- Mobile location-based data offers a more granular lens on visitor behaviour and provides a much larger sample size.
- These insights aim to facilitate a better understanding of visitor movement throughout the Western Cape’s six region.
- Mobile location data serves as a sample. It is not 100% of visitors, 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 **180,537 domestic** and **2,552 international** tourists who visited the Western Cape in October 2023. Within the domestic data set, **83,146** of the sampled tourists were from Cape Town and from the international sampled tourists, **383** were from the United States.

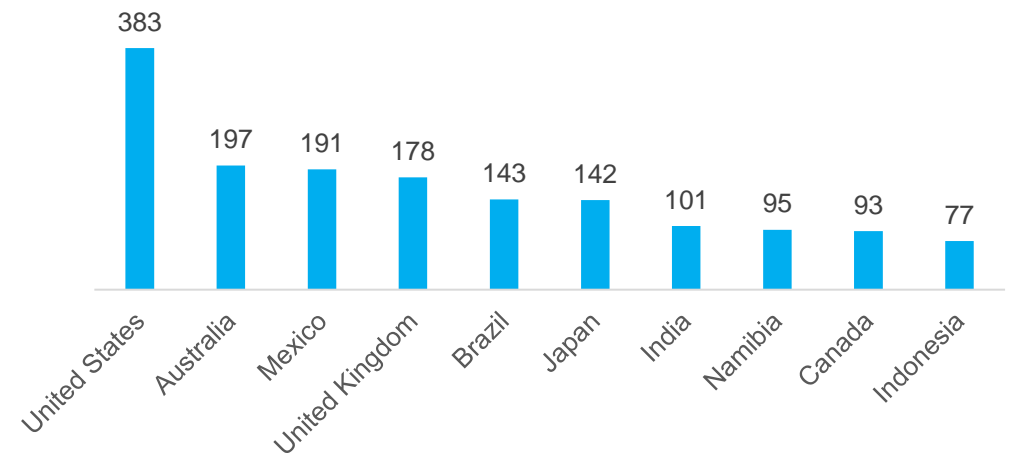
Sample Size, Oct. 2023



Domestic Origin Municipality, Oct. 2023



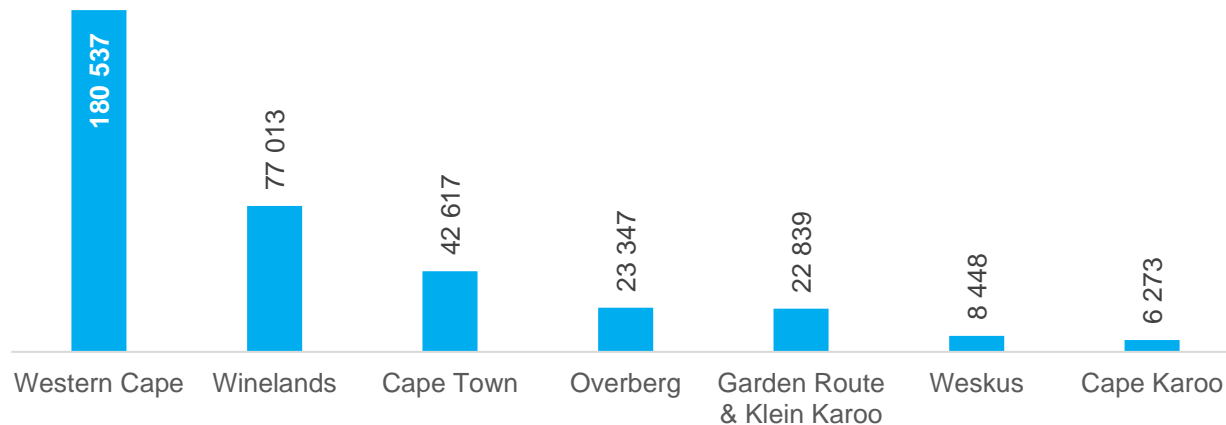
International Origin Country, Oct. 2023



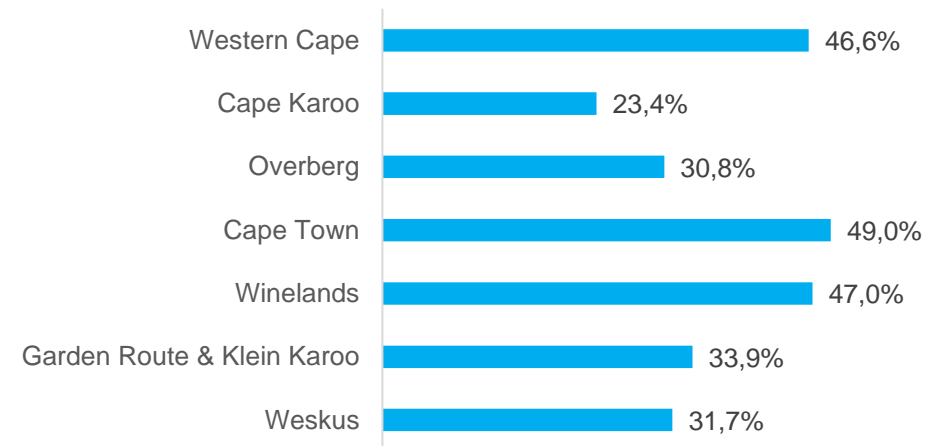
Mobile Insights: Domestic Visitor Trends

- In October 2023, the Western Cape received an average of 46.6% repeat tourists.
- The Winelands (42.7%) and Cape Town (23.6%) saw the most domestic tourists in terms of volume of sample size and Cape Karoo (3.5%) with the least sample size.
- Cape Town (49.0%), the Winelands (47.0%), and Garden Route & Klein Karoo (33.9%) were the most popular regions for domestic repeat visits during the month of October 2023.

Domestic Sample Size, Oct. 2023



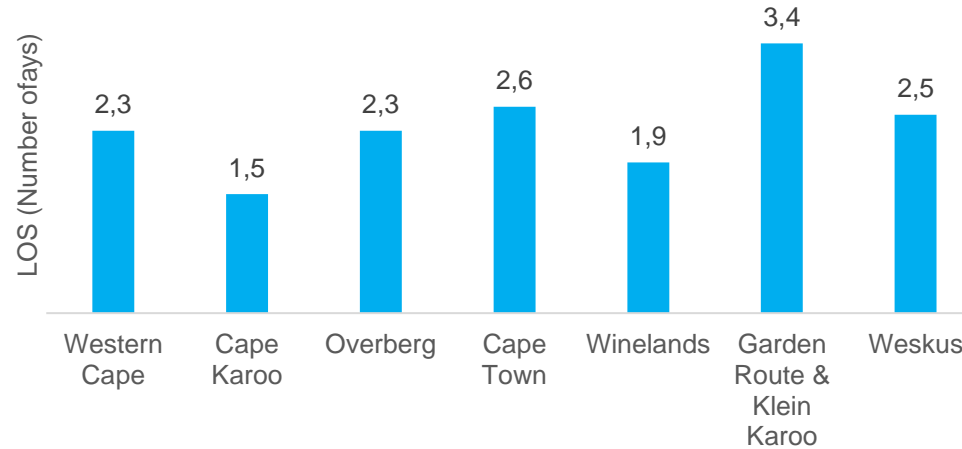
Domestic Repeat Visitors, Oct. 2023



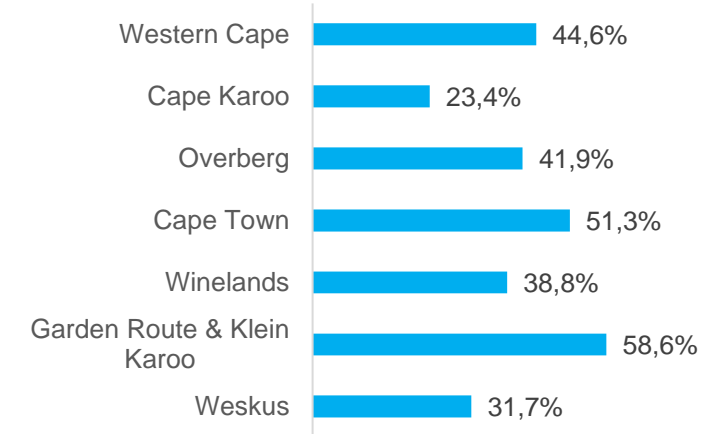
Mobile Insights: Domestic Visitor Trends

- On average, domestic tourists spent the longest time in the Garden Route & Klein Karoo (3.4 days), Cape Town (2.6 days), Weskus (2.5 days) and Overberg (2.3 days).
- Nearly 60% of sampled tourists stayed overnight in the Garden Route & Klein Karoo and 51.3% in Cape Town.
- In contrast, the data shows that 69.6% of domestic tourists visit the Cape Karoo for a day.

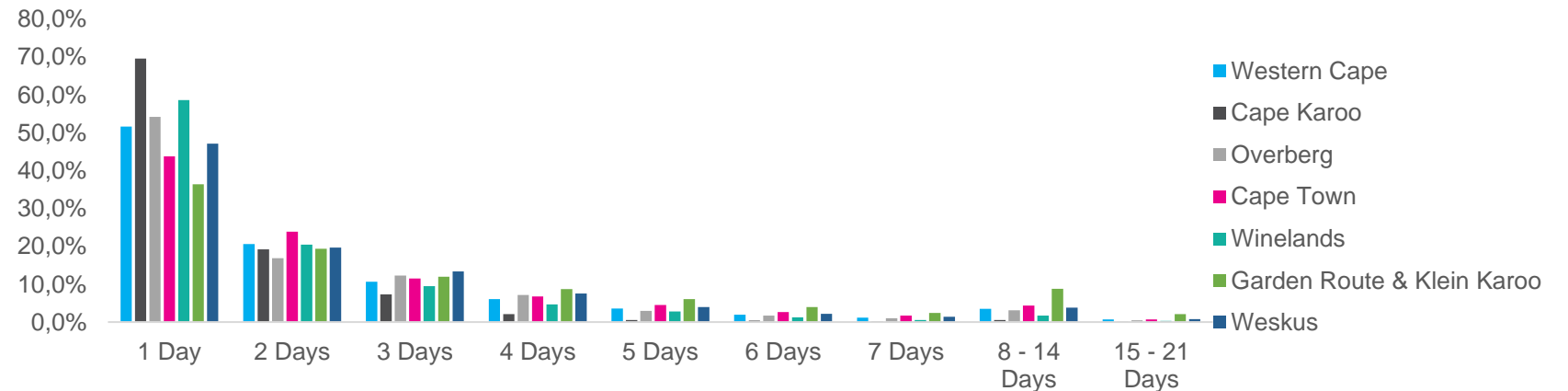
Average Length of Stay (LOS), Oct. 2023



% Overnight Stays, Oct. 2023



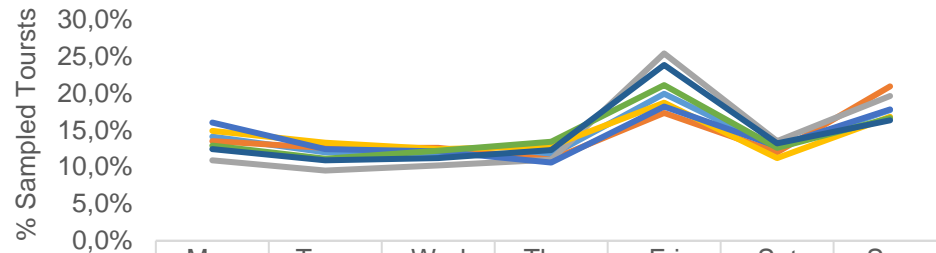
Average Length of Stay (Number of Days): Domestic, Oct. 2023



Mobile Insights: Domestic Visitor Trends

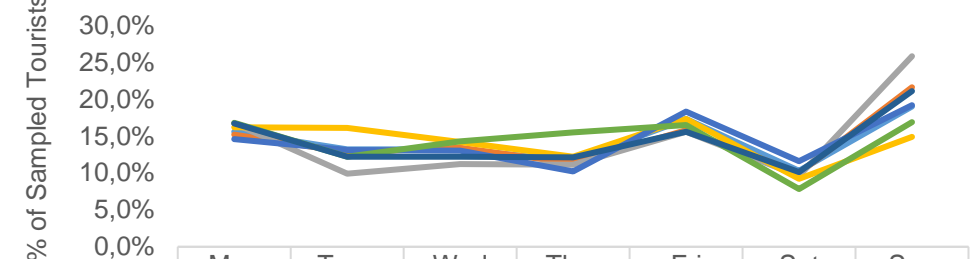
- The data shows that domestic tourists visiting the Western Cape tend to arrive on a Friday and leave on a Sunday.
- This trend is also observed in the Overberg, Weskus, Garden Route & Klein Karoo, Cape Karoo, and the Winelands indicating that weekend stays are popular in the province and these regions.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

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



	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Western Cape	14,1%	12,0%	11,9%	11,6%	19,9%	12,5%	17,7%
Cape Karoo	13,5%	12,6%	12,6%	11,0%	17,3%	12,0%	20,9%
Overberg	10,9%	9,5%	10,2%	11,0%	25,4%	13,5%	19,6%
Cape Town	14,9%	13,3%	12,4%	12,8%	18,7%	11,2%	16,8%
Winelands	16,0%	12,4%	12,1%	10,6%	18,2%	12,8%	17,8%
Garden Route & Klein Karoo	12,9%	11,1%	12,2%	13,4%	21,1%	12,6%	16,6%
Weskus	12,4%	10,9%	11,2%	12,3%	23,8%	13,2%	16,3%

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

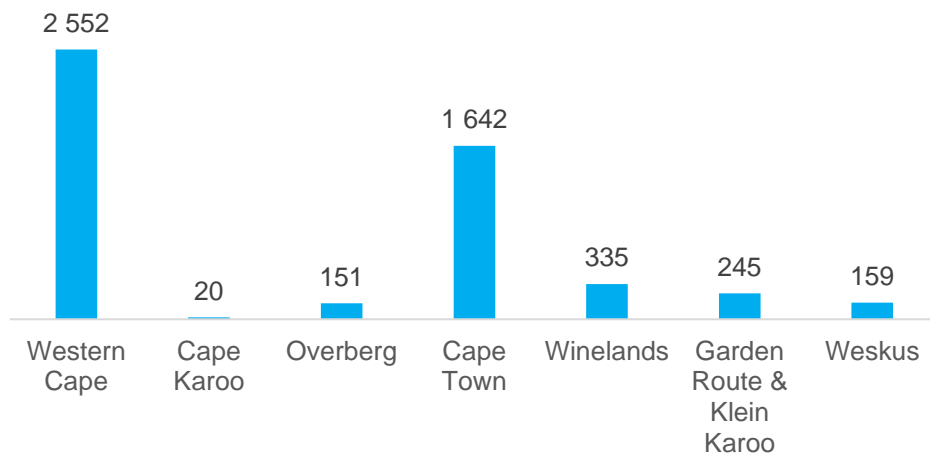


	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Western Cape	15,6%	13,2%	13,2%	11,6%	17,3%	10,3%	19,0%
Cape Karoo	15,2%	12,8%	13,4%	11,3%	15,8%	10,0%	21,6%
Overberg	16,7%	9,9%	11,2%	11,1%	15,6%	9,6%	25,8%
Cape Town	16,2%	16,1%	14,2%	12,2%	17,3%	9,2%	14,9%
Winelands	14,6%	13,1%	13,0%	10,2%	18,3%	11,6%	19,2%
Garden Route & Klein Karoo	16,8%	12,2%	14,3%	15,5%	16,5%	7,8%	16,9%
Weskus	16,7%	12,2%	12,2%	12,1%	15,6%	10,1%	21,1%

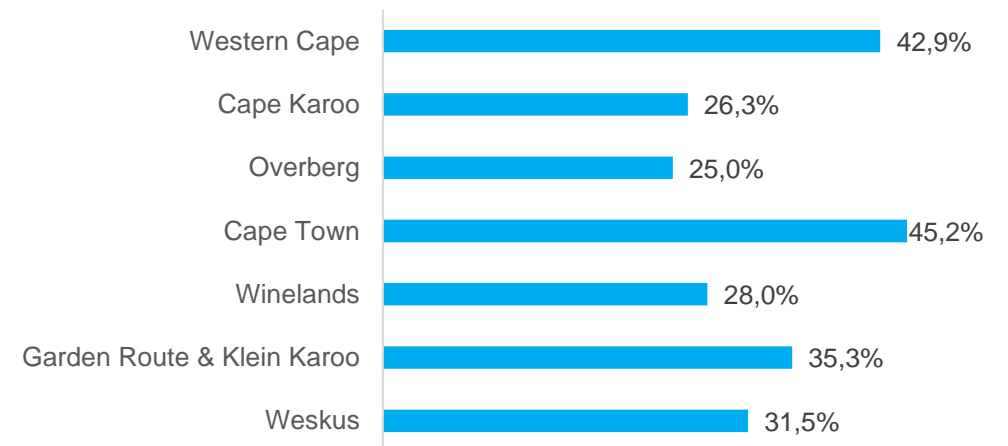
Mobile Insights: International Visitor Trends

- Nearly 65% of the sampled international tourists visited Cape Town followed by 6.2% who visited the Weskus.
- Based on a sample size of only 20 international tourists, visitor trends for the Cape Karoo are not statistically representative.
- Cape Town (45.2%), Garden Route & Klein Karoo (35.3%), and the Weskus (31.5%) regions saw the most international repeat visitors in October 2023.

International Sample Size, Oct. 2023



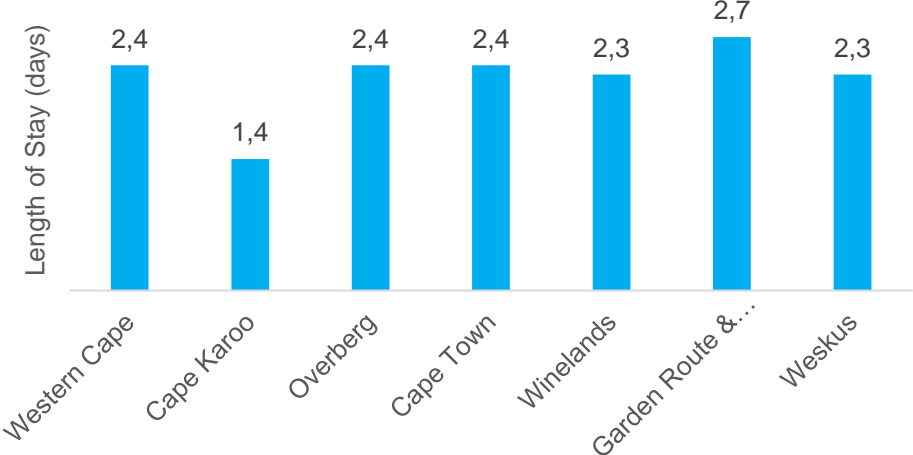
International Tourists Repeat Visits, Oct. 2023



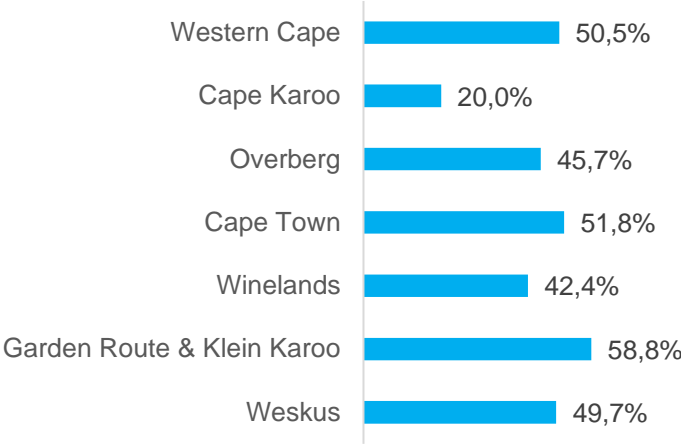
Mobile Insights: International Visitor Trends

- International tourists spent the longest time in Garden Route & Klein (2.7 days) and Cape Town and the Overberg (2.6 days respectively).
- Close to 60% of sampled tourists stayed overnight in the Garden Route & Klein Karoo, 51.8% stayed overnight in Cape Town and 49.7% in the Weskus region.
- Close to 46% of tourists stayed overnight in the Overberg and Winelands with 42.4%.
- The data shows that 65.0% of international tourists visited Cape Karoo for a day and 50.0% stayed between 15-21 days in Cape Town.
- An overnight stay is defined as tourists that arrive prior to midnight and stay until 07:00 the following day.

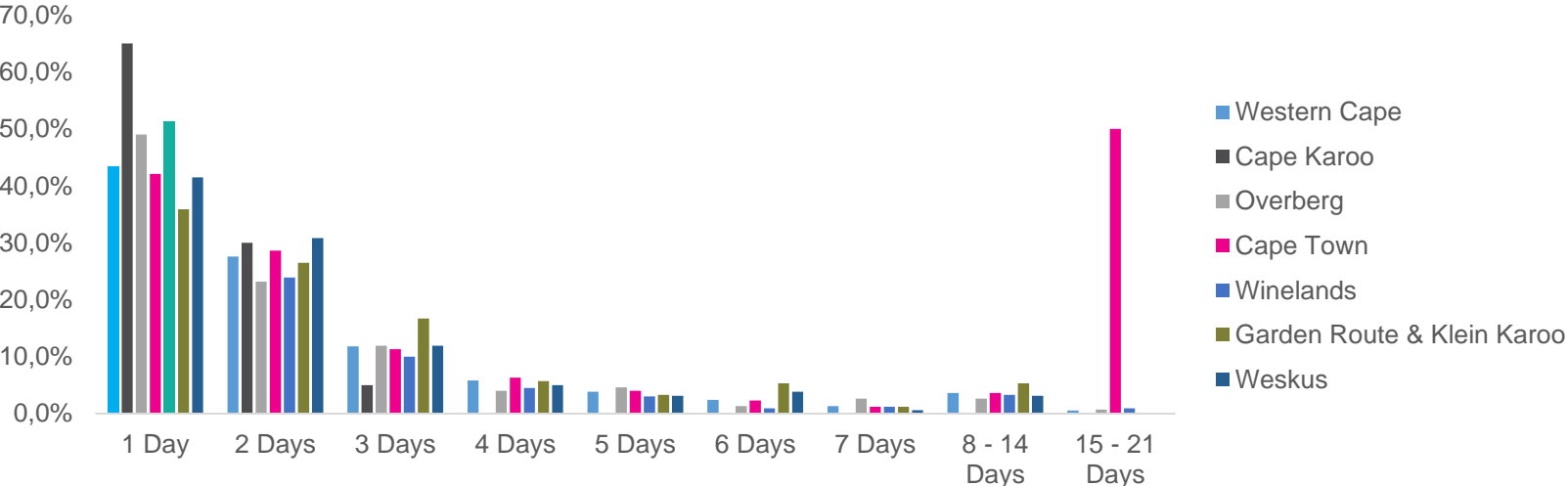
Average Length of Stay (LOS), Oct. 2023



% Overnight Stays, Oct. 2023



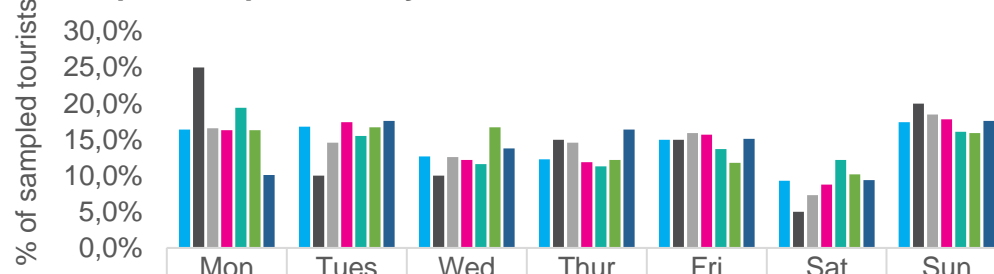
Average Length of Stay (Number of Days): International, Oct. 2023



Mobile Insights: International Visitor Trends

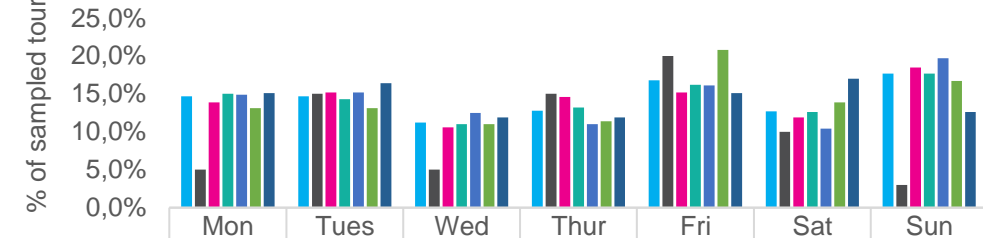
- During October 2023, international tourists to the Western Cape mainly arrived on a Friday and departed on the same day.
- The sampled tourists (20) in the Cape Karoo, arrived on a Friday and departed on a Monday.
- Sunday was the most popular arrival day and departure for Cape Town.

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



Region	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Western Cape	16,4%	16,8%	12,7%	12,3%	15,0%	9,3%	17,4%
Cape Karoo	25,0%	10,0%	10,0%	15,0%	15,0%	5,0%	20,0%
Overberg	16,6%	14,6%	12,6%	14,6%	15,9%	7,3%	18,5%
Cape Town	16,3%	17,4%	12,2%	11,9%	15,7%	8,8%	17,8%
Winelands	19,4%	15,5%	11,6%	11,3%	13,7%	12,2%	16,1%
Garden Route & Klein Karoo	16,3%	16,7%	16,7%	12,2%	11,8%	10,2%	15,9%
Weskus	10,1%	17,6%	13,8%	16,4%	15,1%	9,4%	17,6%

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

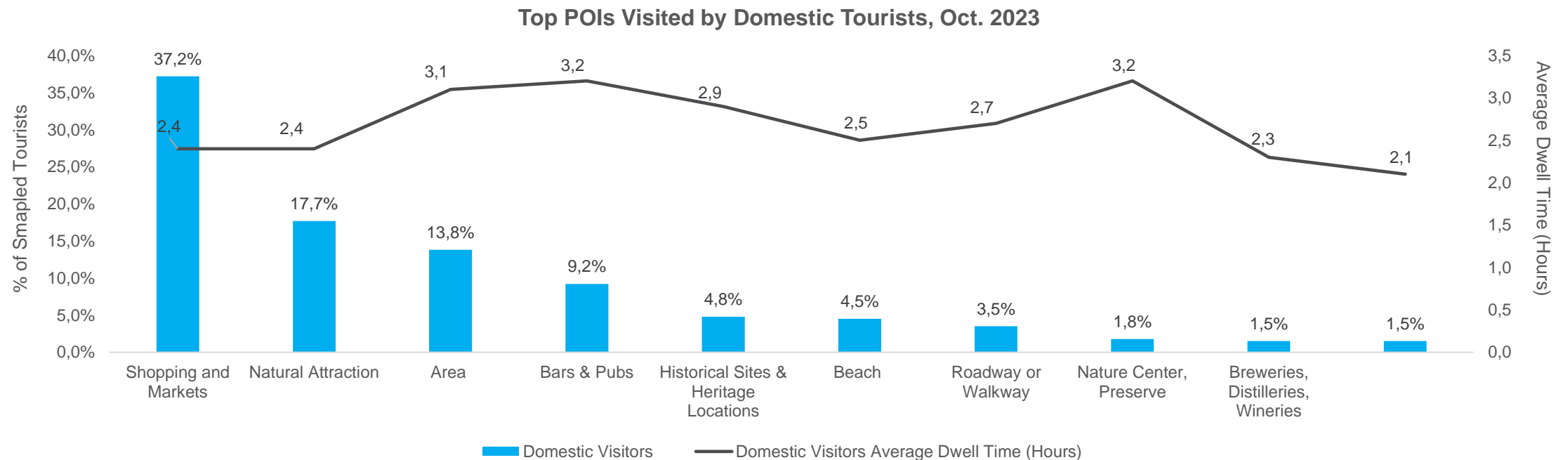


Region	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Western Cape	14,7%	14,7%	11,2%	12,8%	16,8%	12,7%	17,7%
Cape Karoo	5,0%	15,0%	5,0%	15,0%	20,0%	10,0%	3,0%
Overberg	13,9%	15,2%	10,6%	14,6%	15,2%	11,9%	18,5%
Cape Town	15,0%	14,3%	11,0%	13,2%	16,2%	12,6%	17,7%
Winelands	14,9%	15,2%	12,5%	11,0%	16,1%	10,4%	19,7%
Garden Route & Klein Karoo	13,1%	13,1%	11,0%	11,4%	20,8%	13,9%	16,7%
Weskus	15,1%	16,4%	11,9%	11,9%	15,1%	17,0%	12,6%

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

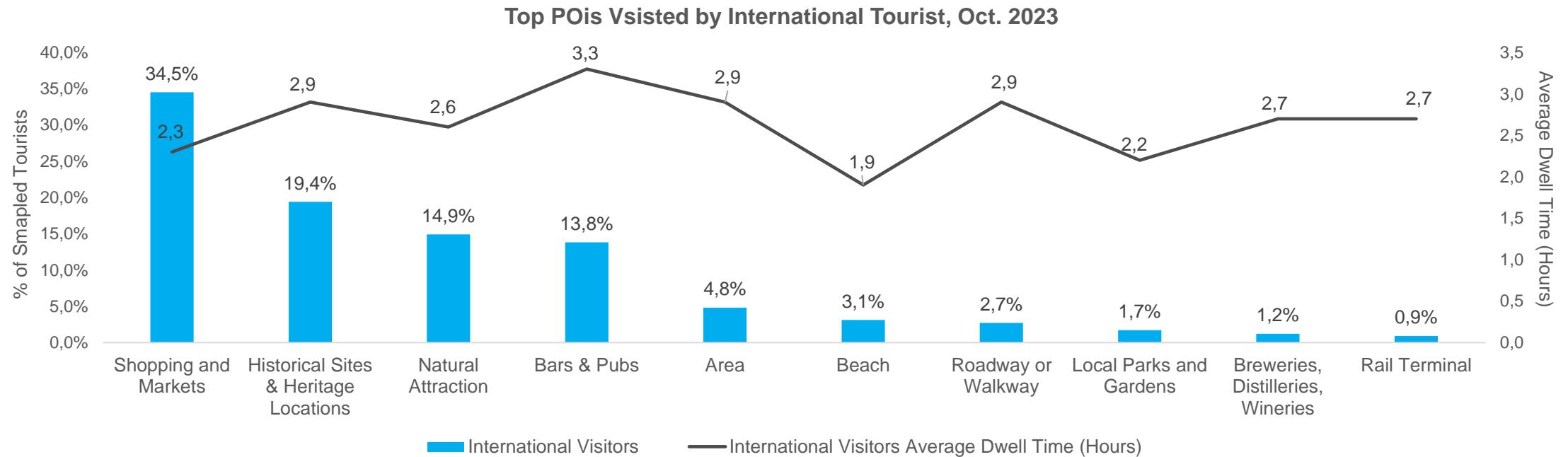
Points of Interest (POIs) Visited: Domestic Tourists

- Shopping and markets were the most popular type of attraction visited by domestic tourists with an average dwell time of 2.4 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 3.1 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 2.9 hours



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 2.3 hours.
- Historical sites and heritage locations ranked the 2nd most popular point of interest among international tourists, with an average dwell time of 2.9 hours.
- Natural attractions ranked as the 3rd most popular point of interest among international tourists, with an average dwell time of 2.6 hours.
- Bars and pubs were the 4th most popular point of interest for international tourists spent an average of 3.3 hours at the location.
- 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 2.9 hours.



Mobile Tourists and Non-Tourists Definitions

- About Mobile Location Data
 - Privacy compliant data is collected from location enabled apps on mobile devices. Data collected when those location enabled mobile devices entered our geo fenced area
 - Data is collected through applications (news, weather, games, texting apps, traffic, etc)
 - Year over year numbers could be skewed by increase app penetration and data privacy settings/policies.
 - Exception with China which does not share data...
 - Think of mobile data like survey data on steroids.
 - A sample size greater than 30 yields a 95% level of confidence.
 - This may be the largest sample size of data pertaining to visitors•
 - Should not be compared to visitation data. •
 - Many factors impact total sample size
 - Number of app partnerships
 - Usage of apps
 - App developer policies
 - Volume of visitors
- Who Are Tourists vs Non-Tourists?
 - A Tourist is typically defined as follows:
 - The visitor does not live or work within the study geography
 - The visitor travels a minimum distance to the study geography
 - The visitor appears in the study geography for a minimum period of time (exclude commuters/passers through etc.)

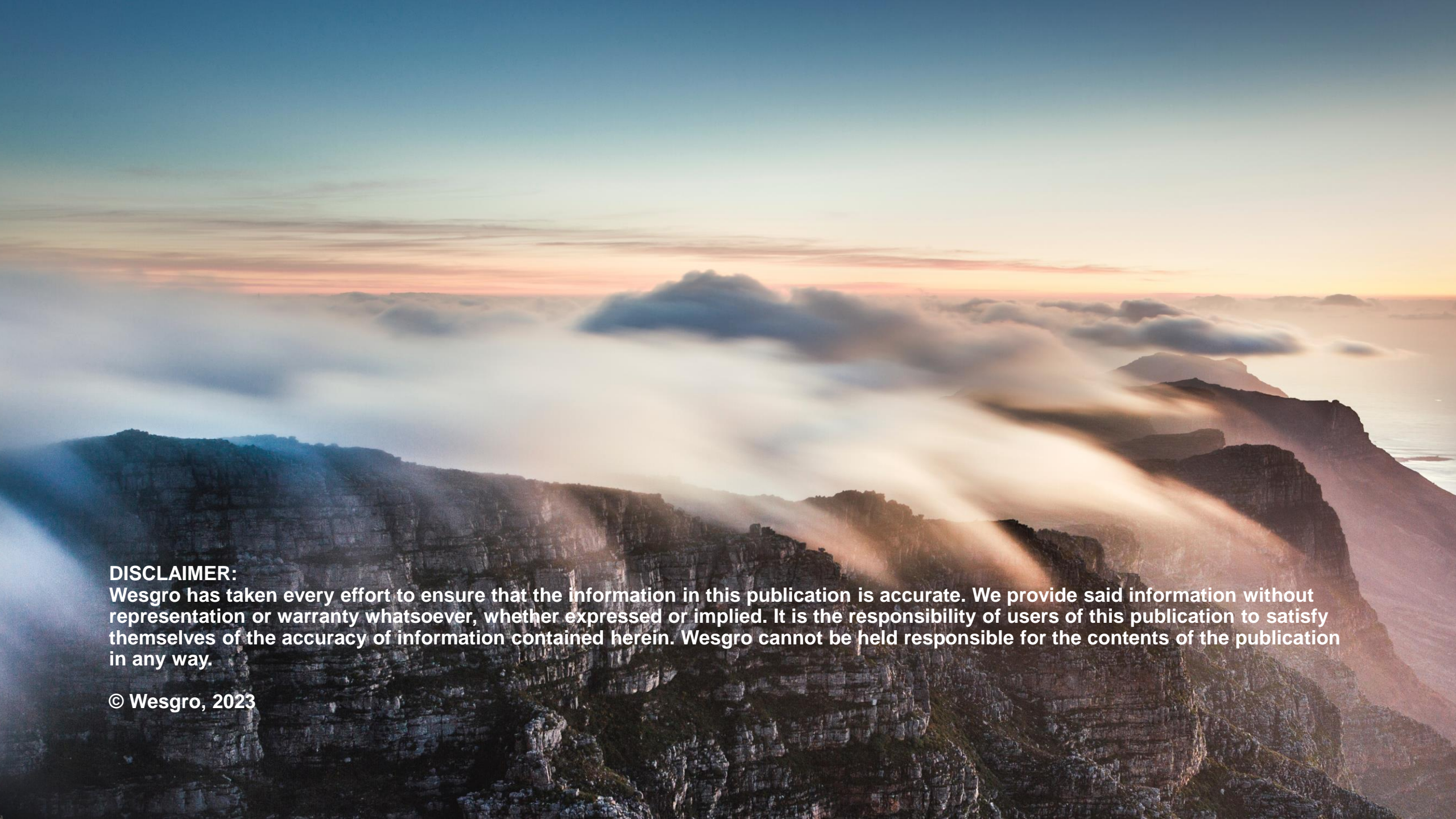
Source: Rove, 2023

Mobile Tourists and Non-Tourists Definitions

Primary Study Geography		Tourists are defined as:
Province/Tourism Regions	When a visitor does not live or work in Cape Town, Cape Winelands, Cape Overberg, Weskus, Garden Route & Klein Karoo and Cape Karoo and they have traveled more than 25 miles (40km) and they have stayed in the polygon for more than 120 minutes, they are a tourist.	
Notes and Considerations: <ul style="list-style-type: none"> Residents of the Western Cape are not counted as a tourists Minimum distance traveled to meet the definition of tourist. Distance travelled is calculated from the visitors Common Evening Location (latitude and longitude) to the center of the polygon. 		
Secondary Study Geography		Tourists are defined as:
City or Town	When a visitor does not live or work in the City or Town and they have traveled more than 25 miles (40km), and they have stayed for more than 45 minutes, they are a tourist.	
Notes and Considerations: <ul style="list-style-type: none"> Residents of a city are not counted as a tourist of the city Minimum distance traveled of 40km satisfies tourist definition for minimum distance traveled. Distance travelled is calculate d f rom the visitors Common Evening Location (latitude and longitude) to the center of the polygon 		
Point of Interest Study Geography		Tourists are defined as:
All Tourism Experiences	When a visitor stays in the polygon for more than 15 minutes and has not visited the polygon more than 20 times in any 90 day period, they are a tourist	
Notes and Considerations: <ul style="list-style-type: none"> Any 90 day period refers to any consecutive 90 days in their mobile location data history Filter out visitors not staying for any meaningful length of time (couriers, taxis etc.). Filter out people who work at the Tourism Experience. 		
What are Tourist Segments?		
<ul style="list-style-type: none"> Local Tourists: Tourists who reside within the same Region. Domestic Tourists: Tourists who reside in South Africa outside of Western Cape International Tourists: Tourists who reside outside of South Africa 		

Glossary of Key Terms

Term	Definition and Usage
Study Geography	A specific geography, defined by a boundary called a polygon.
Primary Study Geography	The largest area in the destination in which you want to capture mobile device data. For most destinations this is usually a country, province, or state.
Secondary Study Geography	Often destinations want to derive insights about sub-geographies within their destination, such as counties, tourism regions, and city regions.
Point of Interest	Points of interest are the smallest study geographies in your destination such as tourism businesses, parks, roadways, or city districts.
Sample	Not all people carry GPS enabled, opted in mobile devices with location services always activated. Thus, in any period of time, in any given study geography, mobile location data is a sample. Therefore, whenever this whitepaper discusses “visitors” or “tourists” or “residents” or any other grouping of devices, it should always be understood to be a sampling of real world visitor ship or foot traffic.
Visitors	Mobile devices seen within the study geography during a specific period of time
Common Evening Location (CEL)	Derived latitude-longitude point near which a device spends most of its time on evenings and/or weekends. While most often associated with a device’s home, there is nothing that inherently guarantees that it is a home (e.g. a person who works an overnight shift at a power plant).
Common Daytime Location (CDL)	Derived latitude-longitude point near which a device spends most of its traditional workweek [Monday Friday, 8am 6pm local time] time]. While most often associated with a device’s office or work location, there is nothing that inherently guarantees that it is an office or work location (e.g. a person who is a stay at home parent).
Residents/Workers/Locals	Terms referring to a visitor segment comprising of devices which are determined to have a CEL or a CDL with the study geography or within a certain (usually short) distance of the study geography. For most tourism analyses, these devices are eliminated from the project because they are not, by definition, tourists. However, it is possible to include these devices within a broader visitor study.
Tourists	Term generally referring to a visitor segment comprising of devices which are determined to have NOT have a CEL or a CDL with the study geography or within a certain (usually short) distance of the study geography but have come to the study geography from a different origin market.
Tourist Segments	Groupings of tourist segments which have a defining characteristic associated with their appearance in a study geography, such as “Short Haul Tourists” or “International Tourists” or “In State Tourists.”
Overnighters	Term which characterizes a specific visitor segment where mobile devices are seen in the study geography for more than one consecutive day. An overnight stay is defined as tourists that arrived prior to midnight (0:00) and stayed until 07:00 the following day.
Day Trippers	Term which characterizes a specific visitor segment where mobile devices are seen in the study geography for less than one day.
Length of Stay	Duration of trip within the study geography. The methodology for calculating length of stay is based on the characteristics of the geography.



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