Tourism Research Overview September 2023

Cape Town & the Western Cape

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

An Inspiring Place To Do Business

Contents

Key Findings

The Western Cape's tourism sector remained strong and consistent into the first nine months of 2023, reflecting consecutive monthly and year-to-date (YTD) growth rates in passenger movement through CTIA's international and domestic terminals. Key highlights of the overall tourism performance in September 2023 are outlined below:

- Two-way passengers through the CTIA international terminal remained strong between Jan and Sep 2023, reaching more than 1.9 million passengers YTD, exceeding pre-pandemic levels by 107% and growing by 60% vs. Jan – Sep 2022. *(Data Source: ACSA, 2023)*

- Over 4.9 million two-way passengers passed through the CTIA domestic terminal between Jan and Sep 2023, standing at 80% recovery against the same period in 2019 and a y-o-y growth of 14% YTD. *(Data Source: ACSA, 2023)*

- Two-way passengers through George Airport reached 576,347 between Jan and Sep 2023, representing a 3% year-on-year increase vs. Jan - Sep 2022. *(Data Source: ACSA, 2023)*

- Between January and September 2023, Cape Town recorded a total of 621,238 tourist arrivals via air, of which 89% originated from overseas markets and 11% from the African continent. Total tourist arrivals as well as overseas tourist arrivals via air remained at full recovery in September 2023 YTD vs. Jan – Sep 2019. *(Data Source: StatsSA, 2023)*

- The UK continues to lead as the top source market to Cape Town (via air) between January and September 2023, 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 tourist arrivals into Cape Town, with 6 out of the top 10 source markets originating from the continent. *(Data Source: StatsSA, 2023)*

- The cumulative total of tourist arrivals between January and September 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 - Sep). These markets included UK (105%), USA (142%), Germany (104%), Netherlands (112%), Italy (109%), India (104%), Canada (104%) and Zimbabwe (178%). *(Data Source: StatsSA, 2023)*

- Footfall to 40 participating attractions across the six regions of the Western Cape recorded a total of 571,657 visitors in September 2023, a 23% year-on-year growth in the number of visitors when compared to September 2022. The top 5 highest year-on-year growth rates in September 2023 were recorded for:
  - Groot Winterhoek Wilderness Area (385%)
  - Robben Island (270%)
  - Swartberg Nature Reserve (178%)
  - Keurbooms River Nature Reserve (91%)
  - Wilderness National Park (72%)

(Data Source: Local Tourism Offices (LTOs) & Attractions, 2023)

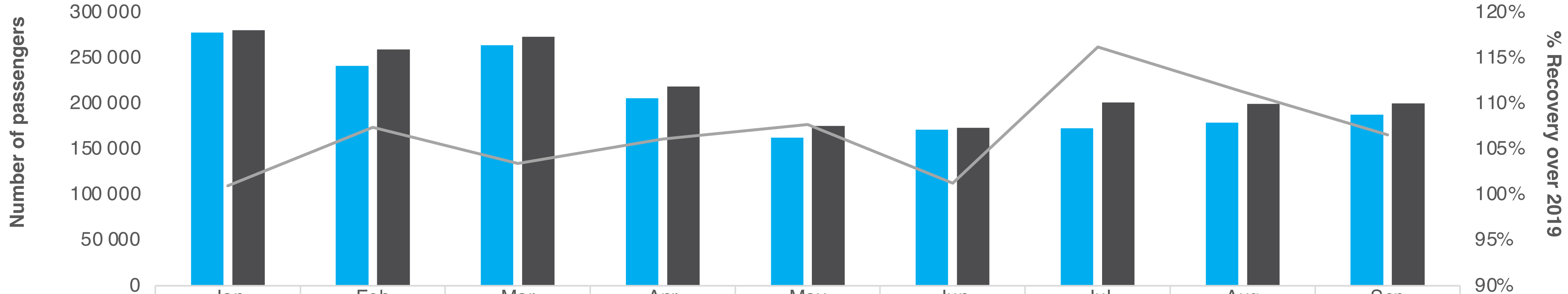
International passenger recovery between Jan and Sep 2023 remains above pre-pandemic levels and stands at 107% YTD.

Year/Month	2019	2020	2021	2022	2023 ytd	2023					
						Apr	May	Jun	Jul	Aug	Sept
Two-way passengers	2 606 398	810 811	525 441	1 895 975	1 979 561	218 325	175 079	173 398	200 952	199 262	200 190
YoY growth percentage*	1%	-69%	-35%	261%	60%	39%	46%	39%	34%	34%	31%

* Growth compared to the same period in the previous year

Source: ACSA, 2023

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



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
2019	277 759	241 187	263 889	205 788	162 622	171 266	172 956	179 034	187 887
2023	280 430	258 970	272 955	218 325	175 079	173 398	200 952	199 262	200 190
23/19 % Recovery	101%	107%	103%	106%	108%	101%	116%	111%	107%

Source: ACSA, 2023

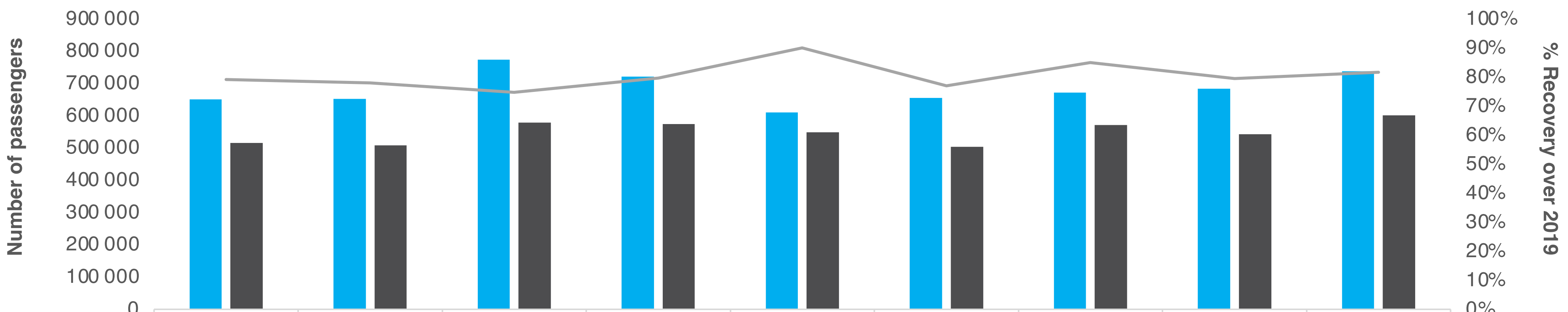
Domestic passengers at 80% recovery between Jan and Sep 2023 YTD

Year/Month	2019	2020	2021	2022	2023 ytd	2023					
						Apr	May	Jun	Jul	Aug	Sept
Two-way passengers	8 363 307	3 167 542	4 221 365	5 960 826	4 941 875	574 528	548 762	503 684	570 673	542 517	601 052
YoY growth percentage*	2%	-62%	33%	41%	14%	7%	9%	24%	25%	18%	24%

* Growth compared to the same period in the previous year

Source: ACSA, 2023

TWO-WAY DOMESTIC PASSENGER RECOVERY, JAN-SEP 2019/2023



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
2019	651 158	651 732	773 516	721 624	609 711	654 873	671 367	682 933	737 077
2023	515 017	507 787	577 855	574 528	548 762	503 684	570 673	542 517	601 052
23/19 % Recovery	79%	78%	75%	80%	90%	77%	85%	79%	82%

Source: ACSA, 2023

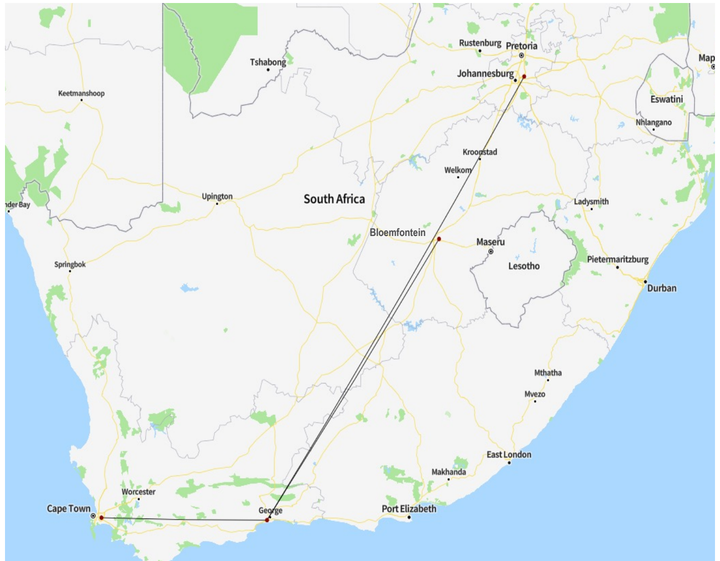
George Airport two-way passengers reached 576,347 between Jan and Sep 2023, registering a 3% increase vs. Jan - Sep 2022.

Year/Month	2019	2020	2021	2022	2023 ytd	2023					
						Apr	May	Jun	Jul	Aug	Sept
Two-way passengers	840 804	346 223	539 637	747 848	576 347	70 165	63 532	58 312	64 346	62 082	64 428
YoY growth percentage*	0%	-59%	56%	39%	3%	-4%	3%	4%	2%	2%	5%

* Growth compared to the same period in the previous year

Source: ACSA, 2023

Operating carriers



Source: OAG Schedules Analyser

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

24 airlines & 28 destinations

Rest of Africa

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

Europe

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

North & South America

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

Asia & Middle East

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

Source: Wesgro Air Access, 2023

IATA summer season route network (April - October 2023)

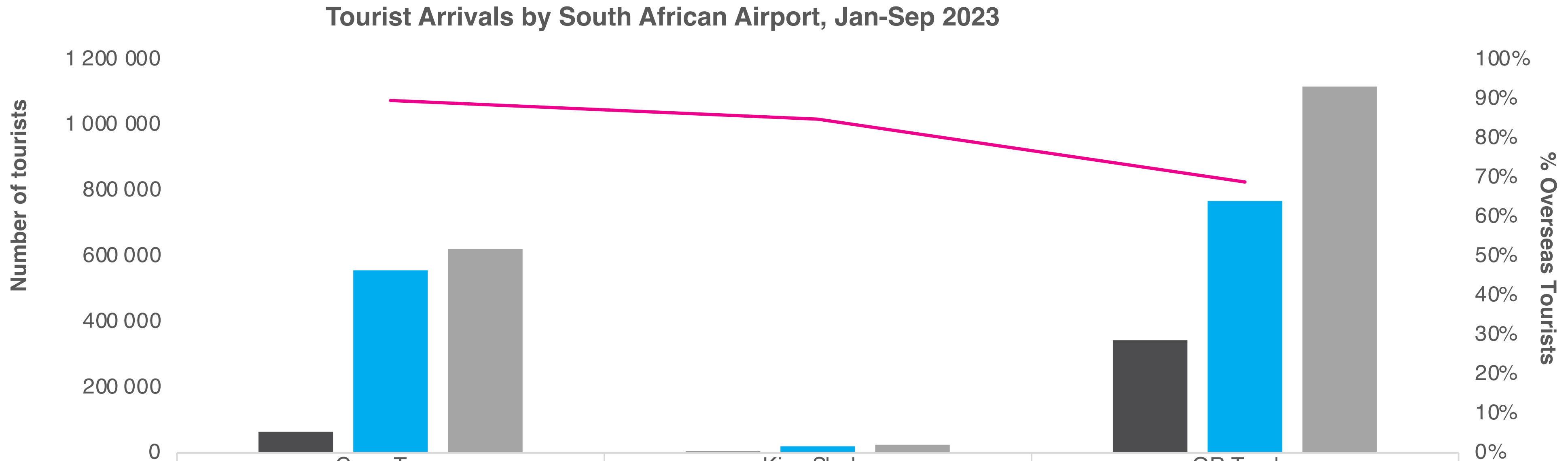
Source: Wesgro Air Access, 2023

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

An Inspiring Place To Do Business

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

Between January and September 2023, Cape Town recorded a total of **621,238** tourist arrivals via air, of which 89% originated from overseas markets and 11% from the African continent. Total tourist arrivals as well as overseas tourist arrivals via air remained at **full recovery** in September 2023 YTD vs. Jan – Sep 2019.



	Cape Town	King Shaka	OR Tambo
Africa Tourist Arrivals	64 650	3 634	342 692
Overseas Tourist Arrivals	555 737	20 191	767 169
Total Tourist Arrivals	621 238	23 842	1 115 761
Overseas % Share of Total Tourists	89%	85%	69%

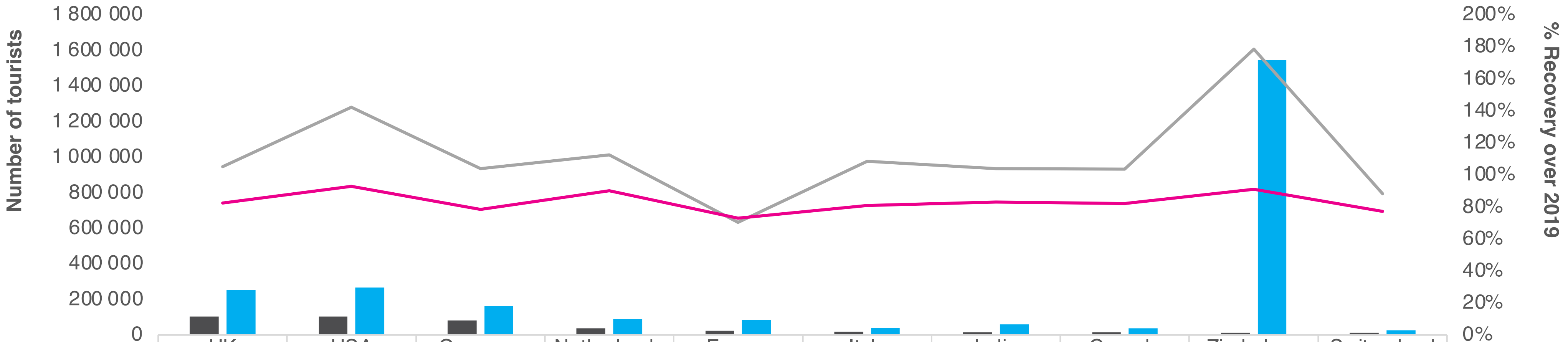
Source: StatsSA, 2023

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

- **The UK continues to lead as the top source market to Cape Town (via air)** between January and September 2023, 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 tourist arrivals into Cape Town, **with 6 out of the top 10 source markets originating from the continent.**

- The cumulative total of tourist arrivals between January and September 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 - Sep). These markets included UK (105%), USA (142%), Germany (104%), Netherlands (112%), Italy (109%), India (104%), Canada (104%) and Zimbabwe (178%).

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



	UK	USA	Germany	Netherlands	France	Italy	India	Canada	Zimbabwe	Switzerland
Cape Town (via air)	102 084	102 082	82 434	36 781	22 893	17 267	15 892	14 543	13 262	12 420
South Africa	252 069	265 411	162 268	90 639	85 077	39 516	60 396	38 450	1 544 362	27 355
Cape Town % Recovery	105%	142%	104%	112%	70%	109%	104%	104%	178%	88%
SA % Recovery	82%	93%	78%	90%	73%	81%	83%	82%	91%	77%

Source: StatsSA, 2023

Performance of Western Cape Attractions: September 2023

- Footfall to 40 participating attractions across the six regions of the Western Cape recorded a total of **571,657** visitors in September 2023, a **23% growth in the number of visitors** when compared to September 2022.
- The top 5 highest year-on-year growth rates in September 2023 were recorded for:
    - Groot Winterhoek Wilderness Area (385%)
    - Robben Island (270%)
    - Swartberg Nature Reserve (178%)
    - Keurbooms River Nature Reserve (91%)
    - Wilderness National Park (72%)

Sources: LTO's, and Attractions, 2023

Western Cape Attractions	Sep-22	Sep-23	Sep 22/23 % Change
Cape Town			
Kirstenbosch National Botanical Garden	44 961	40 864	-9%
Table Mountain Aerial Cableway	64 892	71 050	9%
Table Mountain National Park	160 228	203 575	27%
Table Mountain National Park: Boulders	36 294	54 603	50%
Table Mountain National Park: Cape of Good Hope	55 315	73 693	33%
Robben Island	3 815	14 114	270%
Overberg			
Agulhas National Park	1 295	1 249	-4%
Bontebok National Park	1 754	1 247	-29%
Cape Agulhas Lighthouse	1 018	1 617	59%
Harold Porter National Botanical Garden	2 865	649	-77%
Shipwreck Museum	200	88	-56%
Panthera Africa	226	229	1%
Grootvadersbosch Nature Reserve	601	662	10%
Marloth Nature Reserve	413	436	6%
Walker Bay Nature Reserve	1 101	1 703	55%
De Hoop Nature Reserve	1 139	1 658	46%
De Mond Nature Reserve	124	106	-15%
Kogelberg Nature Reserve	585	649	11%
Garden Route & Klein Karoo			
Cango Caves	9 985	14 865	49%
Tsitsikamma National Park	16 877	20 550	22%
Wilderness National Park	5 750	9 884	72%
Knysna National Park	5 963	3 992	-33%
Goukamma Nature Reserve	288	99	-66%
Keurbooms River Nature Reserve	3 338	6 373	91%
Robberg Nature Reserve	5 762	6 518	13%
Weskus			
West Coast National Park	28 410	29 708	5%
!Khwa ttu	1 921	2 242	17%
Cederberg-Algeria Nature Reserve	1 500	1 127	-25%
Cederberg-Kliphuis Nature Reserve	180	238	32%
Groot Winterhoek Wilderness Area	40	194	385%
Matjiesrivier Nature Reserve	807	457	-43%
Rocherpan Nature Reserve	299	438	46%
Winelands			
Hottentots Holland Nature Reserve	214	201	-6%
Jonkershoek Nature Reserve	1 935	884	-54%
Limietberg Nature Reserve	573	408	-29%
Vrolijkheid Nature Reserve	617	1 058	71%
Cape Karoo			
Karoo National Park	3 481	4 002	15%
Anysberg Nature Reserve	43	46	7%
Gamkaberg Nature Reserve	104	156	50%
Swartberg Nature Reserve	9	25	178%
Total	**464 922**	**571 657**	**23%**

Visitor Trends
Mobile Location Data Insights

Western Cape Mobile Location Data Insights

What is mobile location data?

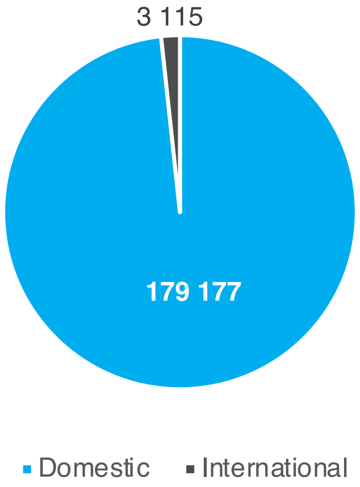
- Geo or spatial data from smartphones. When a user installs an app, they are often asked to share their location data with the company which provides the app, and other companies who are partners with the app publisher.
- Users can “opt in” to location sharing (or choose not to “opt in”). When they opt in, then their phone collects data and shares it with the publisher companies.
- All data collected is anonymized and does not include any personally identifiable information.

Why use mobile location data insights?

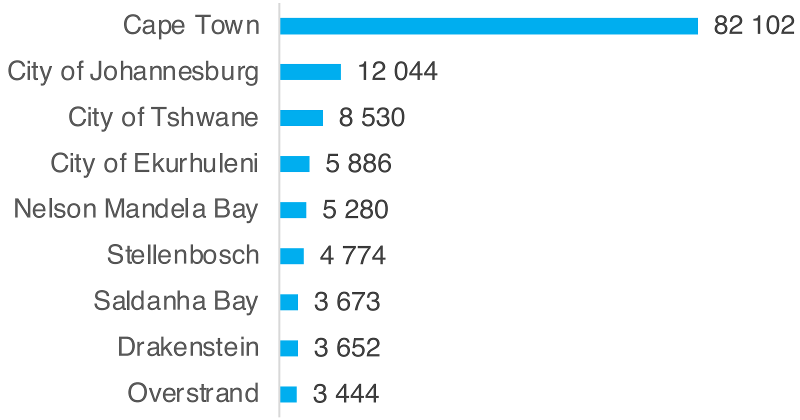
- Mobile location-based data offers a more granular lens on visitor behaviour and provides a much larger sample size.
- These insights aim to facilitate a better understanding of visitor movement throughout the Western Cape’s six region.
- Mobile location data serves as a sample. It is not 100% of visitors, and it should not be treated as such. Like any sampling method, it can be subject to biases or lack of volume.

The insights in this report represent mobile location data from a sample of **179,177 domestic** and **3,115 international** tourists who visited the Western Cape in September 2023. Within the domestic data set, **82,102** of the sampled tourists were from Cape Town and from the international sampled tourists, **592** were from the United Kingdom.

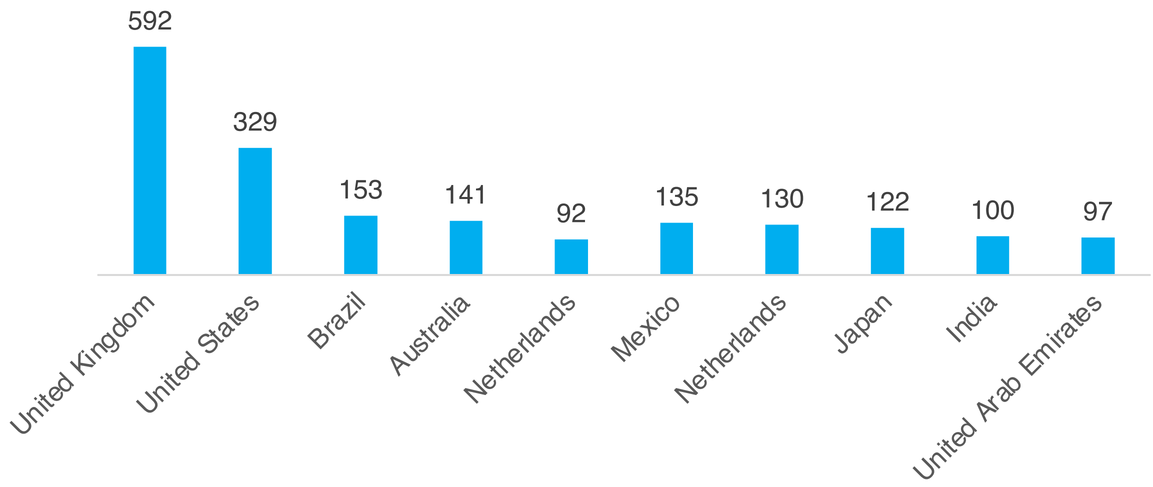
Sample Size, Sep. 2023



Domestic Origin Municipality, Sep. 2023



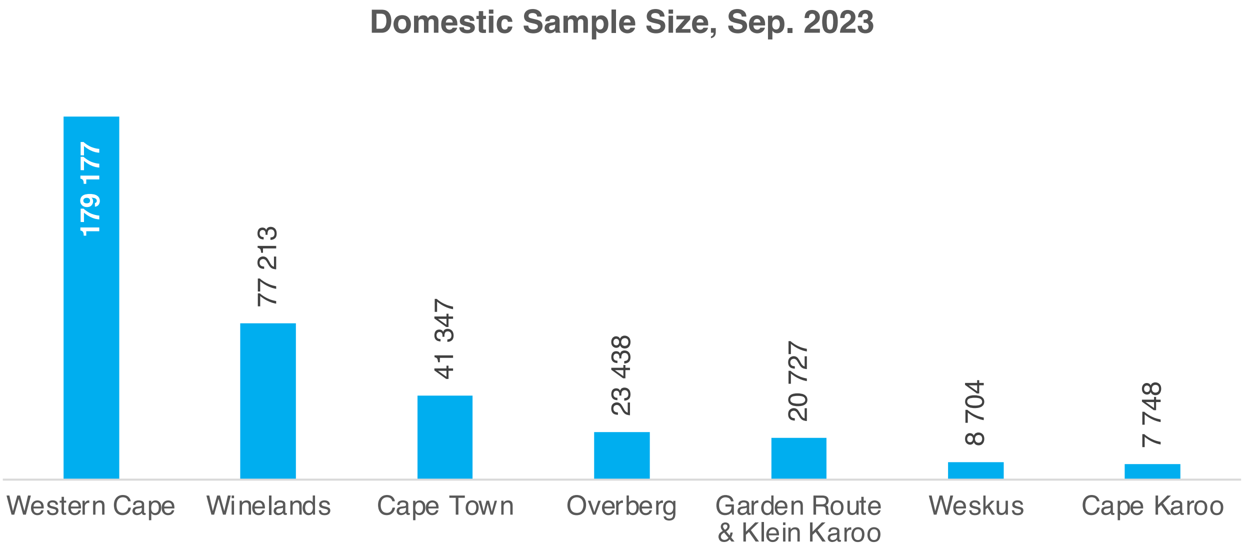
International Origin Country, Sep. 2023

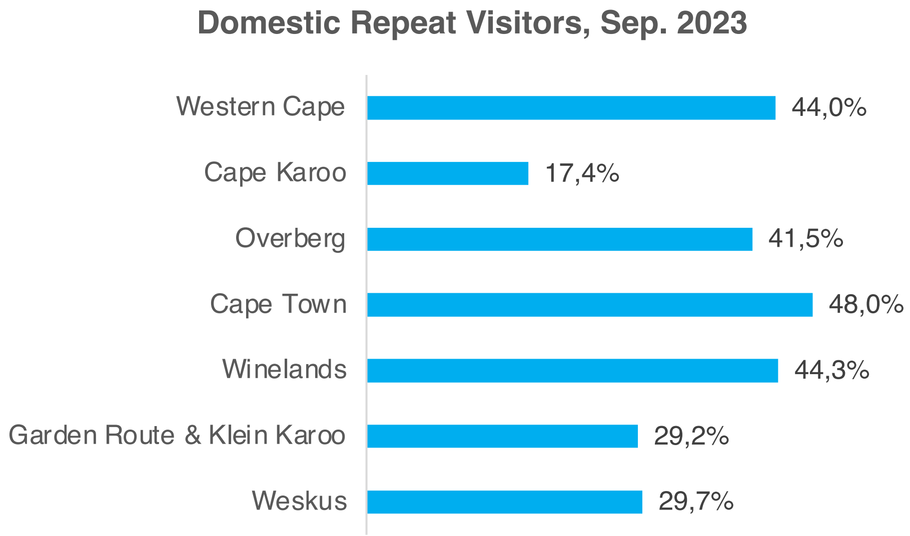


Source: Rove, 2023

Mobile Insights: Domestic Visitor Trends

- In September 2023, the Western Cape received an average of 44.0% repeat tourists.
- The Winelands (43.1%) and Cape Town (23.1%) saw the most domestic tourists in terms of volume of sample size and Cape Karoo (4.3%) with the least sample size.
- Cape Town (48.0%), the Winelands (44.3), and Overberg (41.5%) were the most popular regions for domestic repeat visits during the month of September 2023.

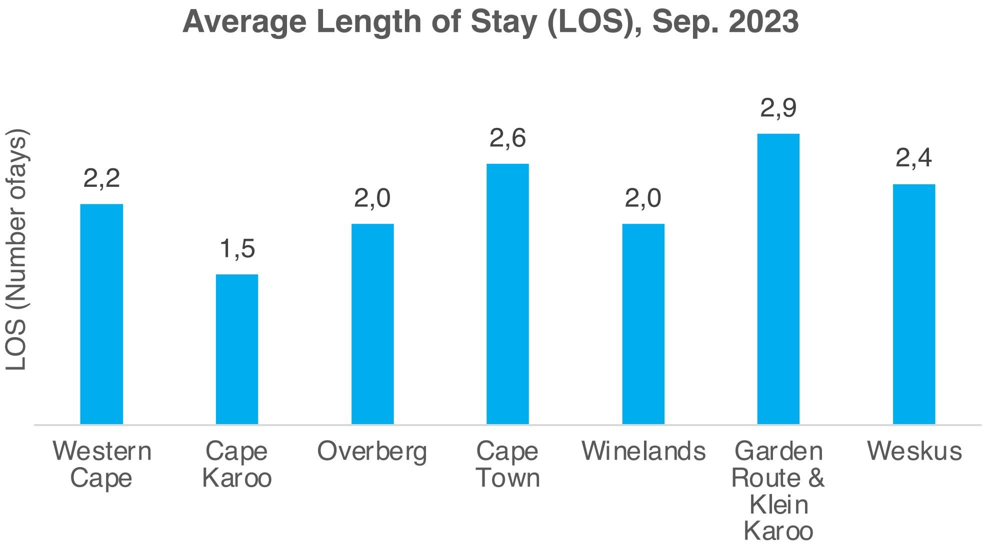


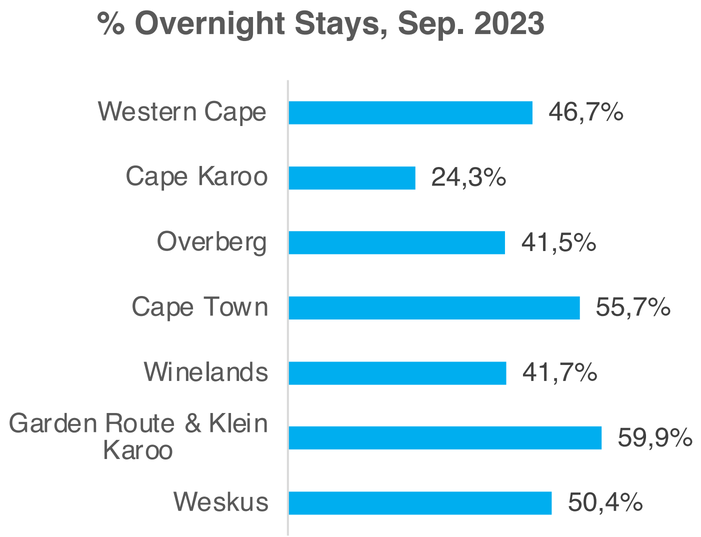


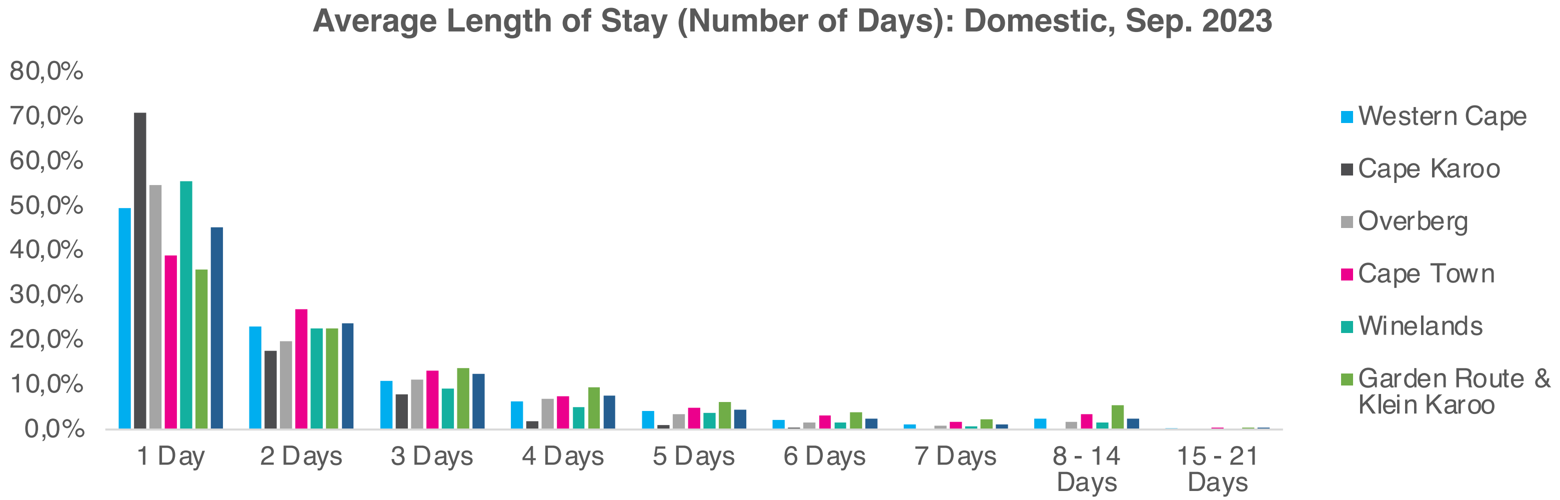
Source: Rove, 2023

Mobile Insights: Domestic Visitor Trends

- On average, domestic tourists spent the longest time in the Garden Route & Klein Karoo (2.9), Cape Town (2.6), Weskus (2.4%) and Overberg and Winelands (2.0 respectively).
- Nearly 60% of sampled tourists stayed overnight in the Garden Route & Klein Karoo and 50.4% in the Weskus.
- In contrast, the data shows that 70.9% of domestic tourists visit the Cape Karoo for a day.





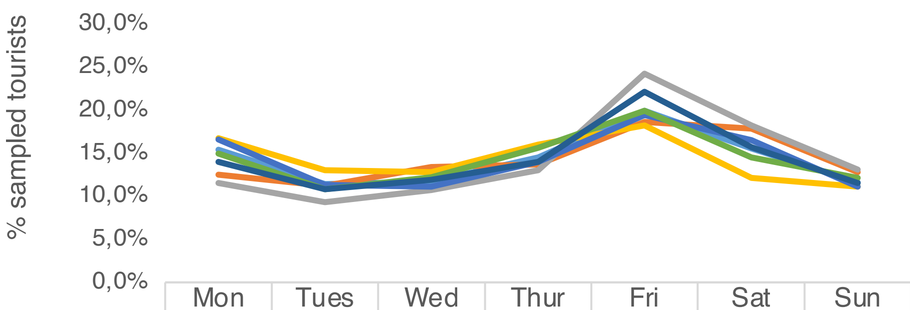


Source: Rove, 2023

Mobile Insights: Domestic Visitor Trends

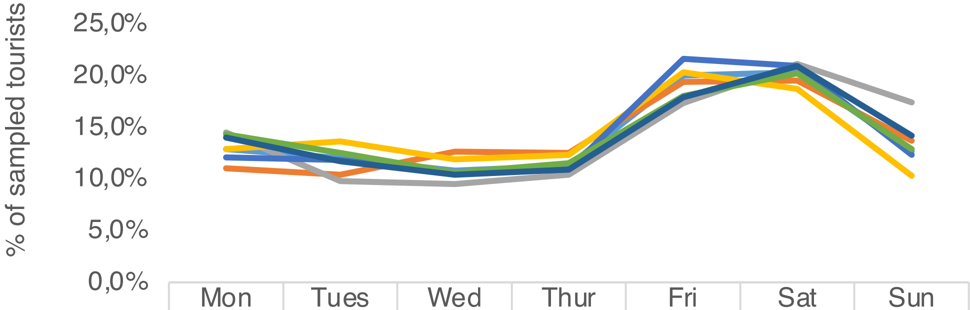
- The data shows that domestic tourists visiting the Western Cape tend to arrive on a Friday and leave on a Saturday.
- This trend is also observed in the Overberg, Cape Karoo, Garden Route & Klein Karoo, Weskus, Cape Town, and the Winelands indicating that weekend stays are popular in the province and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

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



	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Western Cape	15,4%	11,4%	11,7%	14,5%	19,9%	15,5%	11,6%
Cape Karoo	12,5%	11,2%	13,4%	13,7%	18,6%	17,8%	12,8%
Overberg	11,5%	9,3%	10,7%	13,0%	24,2%	18,2%	13,1%
Cape Town	16,7%	13,0%	12,8%	16,0%	18,2%	12,1%	11,1%
Winelands	16,6%	11,3%	11,1%	14,0%	19,4%	16,5%	11,1%
Garden Route & Klein Karoo	14,9%	10,8%	12,2%	15,6%	19,9%	14,5%	12,1%
Weskus	14,0%	10,8%	11,9%	14,0%	22,1%	15,7%	11,5%

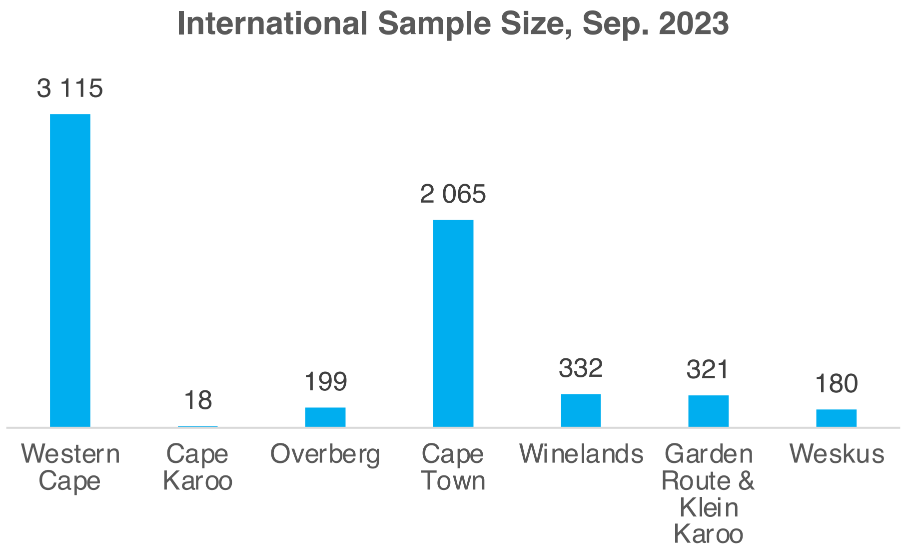
Popular Departure Days of the Week: Domestic, Sep. 2023

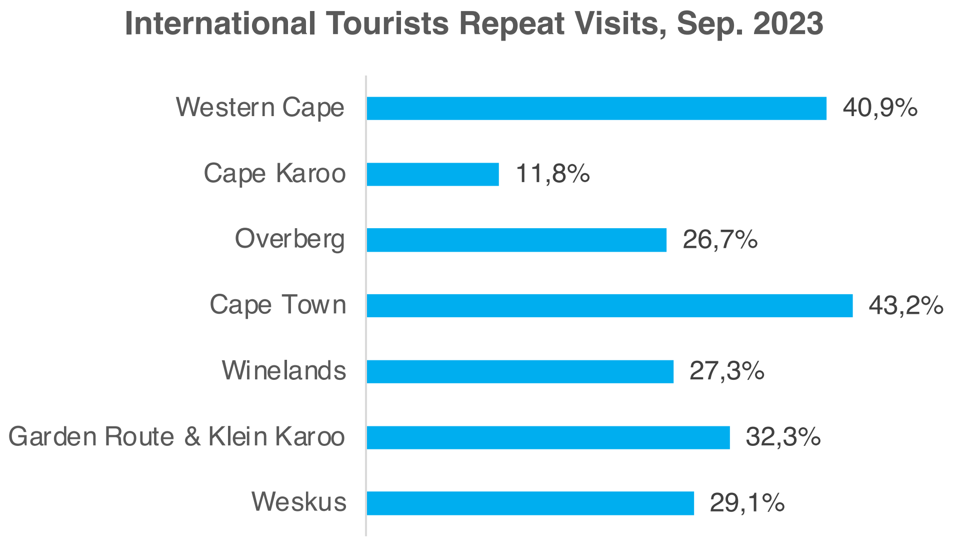


	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Western Cape	12,9%	12,0%	10,8%	11,3%	20,0%	20,3%	12,7%
Cape Karoo	11,0%	10,4%	12,6%	12,5%	19,4%	19,5%	13,7%
Overberg	14,5%	9,8%	9,5%	10,4%	17,3%	21,1%	17,4%
Cape Town	12,9%	13,6%	11,9%	12,3%	20,3%	18,7%	10,3%
Winelands	12,1%	11,8%	10,5%	10,9%	21,6%	20,9%	12,3%
Garden Route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

Mobile Insights: International Visitor Trends

- Nearly 67% of the sampled international tourists visited Cape Town followed by 5.8% who visited the Weskus.
- Based on a sample size of only 18 international tourists, visitor trends for the Cape Karoo are not statistically representative.
- Cape Town (43.2%) and Garden Route & Klein Karoo (32.3%) regions saw the most international repeat visitors in September 2023.

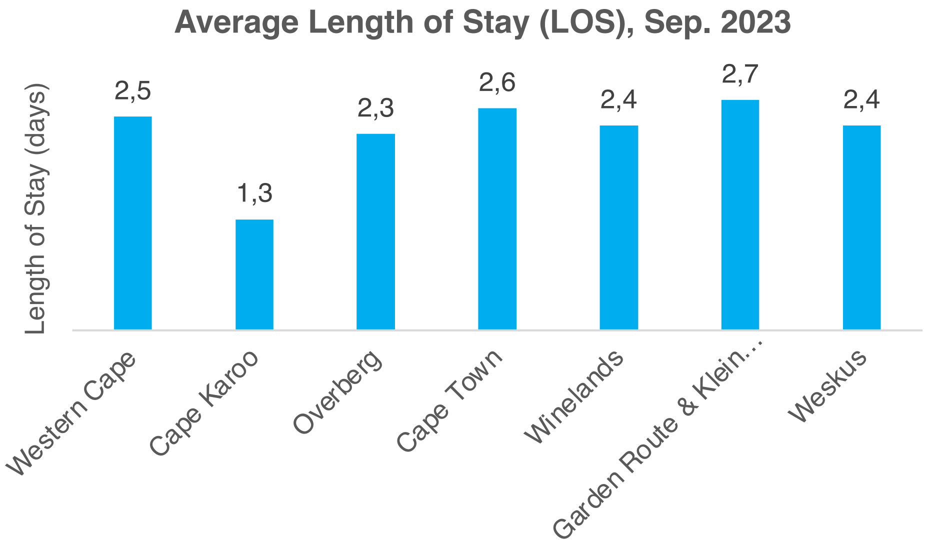


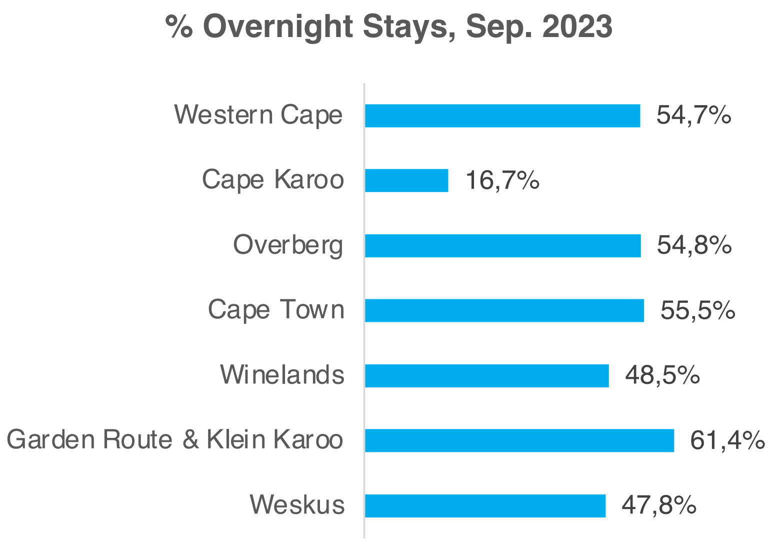


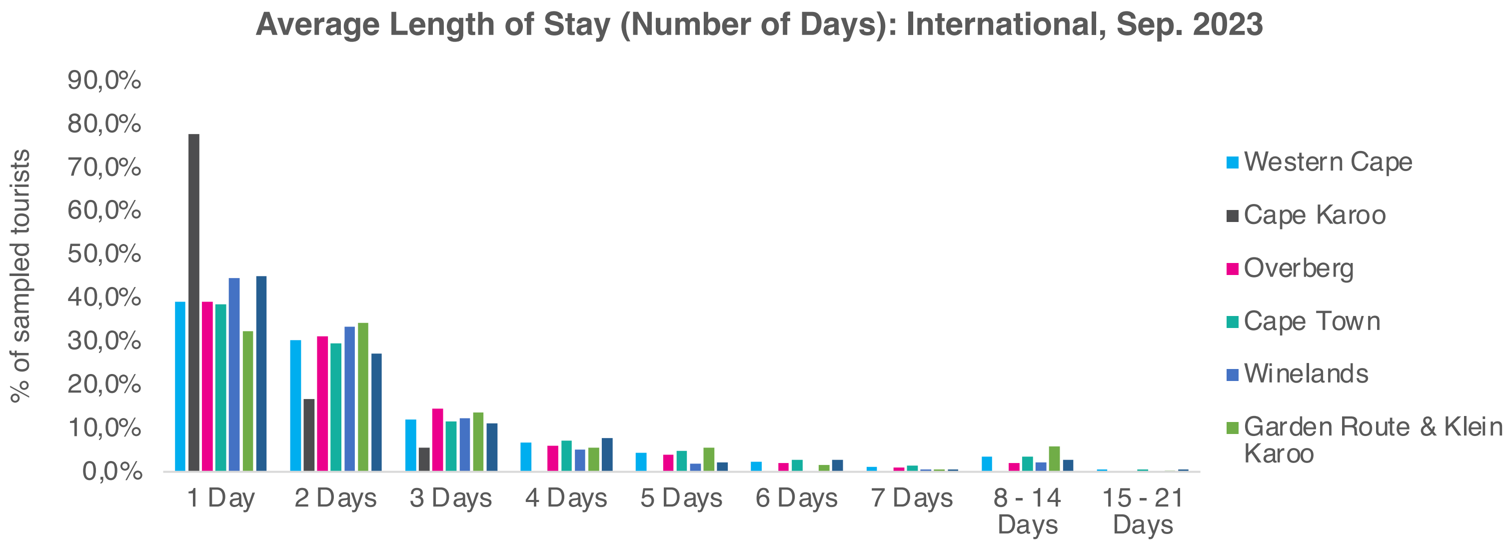
Source: Rove, 2023

Mobile Insights: International Visitor Trends

- International tourists spent the longest time in Garden Route & Klein (2.7 days) and Cape Town (2.6 days).
- Over 60% of sampled tourists stayed overnight in the Garden Route & Klein Karoo, 55.5% stayed overnight in Cape Town and 54.8% in the Overberg region.
- Close to 49% of tourists stayed overnight in the Winelands and Weskus, with 47.8%.
- The data shows that 77.8% of international tourists visit Cape Karoo for a day.
- An overnight stay is defined as tourists that arrive prior to midnight and stay until 07:00 the following day.





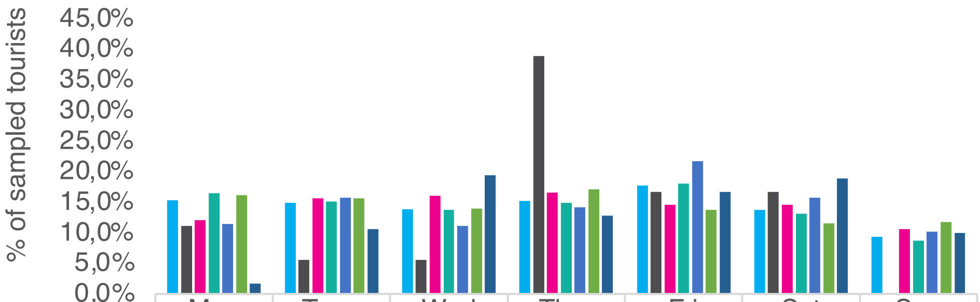


Source: Rove, 2023

Mobile Insights: International Visitor Trends

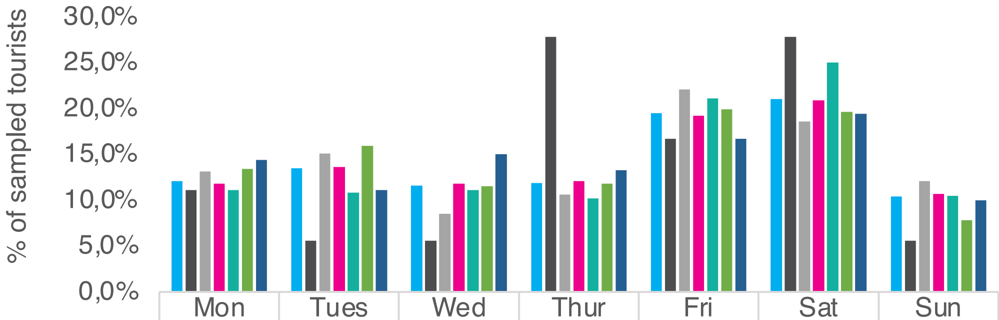
- During September 2023, international tourists to the Western Cape mainly arrived on a Friday, while departures were mostly on a Saturday.
- This trend is also observed in Cape Town, and the Winelands indicating that weekend stays are popular in the province and in these regions.

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



	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Western Cape	15,3%	14,9%	13,9%	15,2%	17,7%	13,7%	9,3%
Cape Karoo	11,1%	5,6%	5,6%	38,9%	16,7%	16,7%	0,0%
Overberg	12,1%	15,6%	16,1%	16,6%	14,6%	14,6%	10,6%
Cape Town	16,5%	15,1%	13,7%	14,9%	18,0%	13,1%	8,7%
Winelands	11,4%	15,7%	11,1%	14,2%	21,7%	15,7%	10,2%
Garden Route & Klein Karoo	16,2%	15,6%	14,0%	17,1%	13,7%	11,5%	11,8%
Weskus	1,7%	10,6%	19,4%	12,8%	16,7%	18,9%	10,0%

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



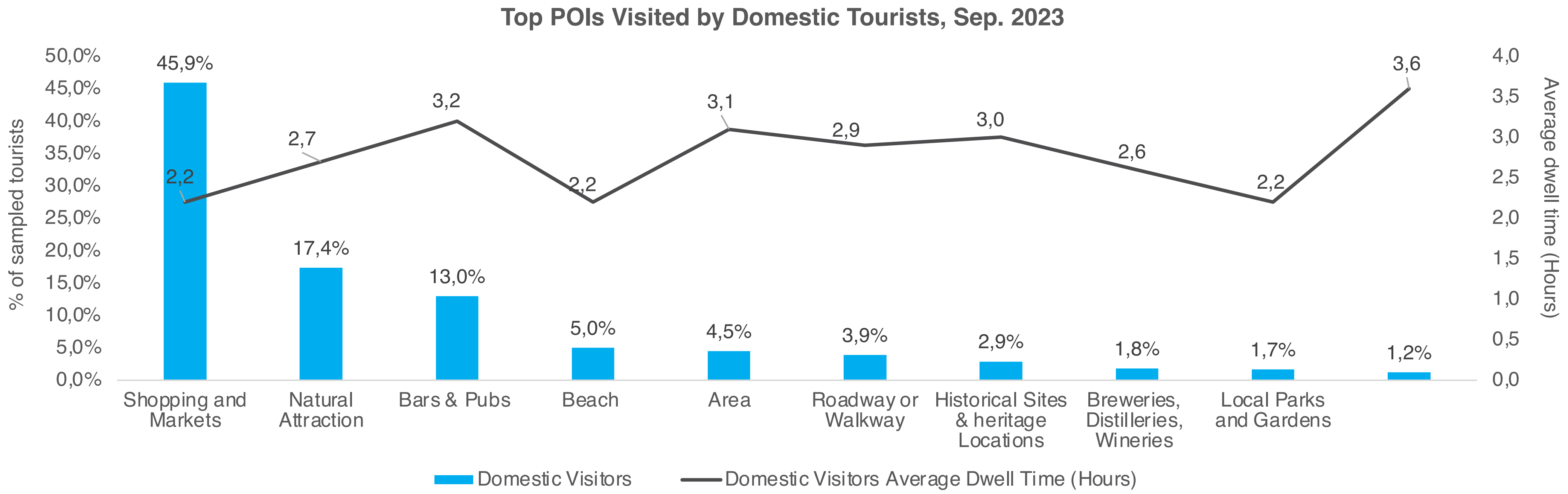
	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Western Cape	12,1%	13,5%	11,6%	11,9%	19,5%	21,0%	10,4%
Cape Karoo	11,1%	5,6%	5,6%	27,8%	16,7%	27,8%	5,6%
Overberg	13,1%	15,1%	8,5%	10,6%	22,1%	18,6%	12,1%
Cape Town	11,8%	13,6%	11,8%	12,1%	19,2%	20,9%	10,7%
Winelands	11,1%	10,8%	11,1%	10,2%	21,1%	25,0%	10,5%
Garden Route & Klein Karoo	13,4%	15,9%	11,5%	11,8%	19,9%	19,6%	7,8%
Weskus	14,4%	11,1%	15,0%	13,3%	16,7%	19,4%	10,0%

- The sampled tourists (18) in the Cape Karoo, arrived on a Thursday and departed on Friday.
- Garden Route & Klein Karoo arrival day was most common on a Thursday and departures were on a Saturday.
- Wednesday was the most popular arrival day, and the departure day in Weskus was on a Saturday.
- In the Overberg, Thursday was popular for arrival day and departure was on Saturday.

Source: Rove, 2023

Points of Interest (POIs) Visited: Domestic Tourists

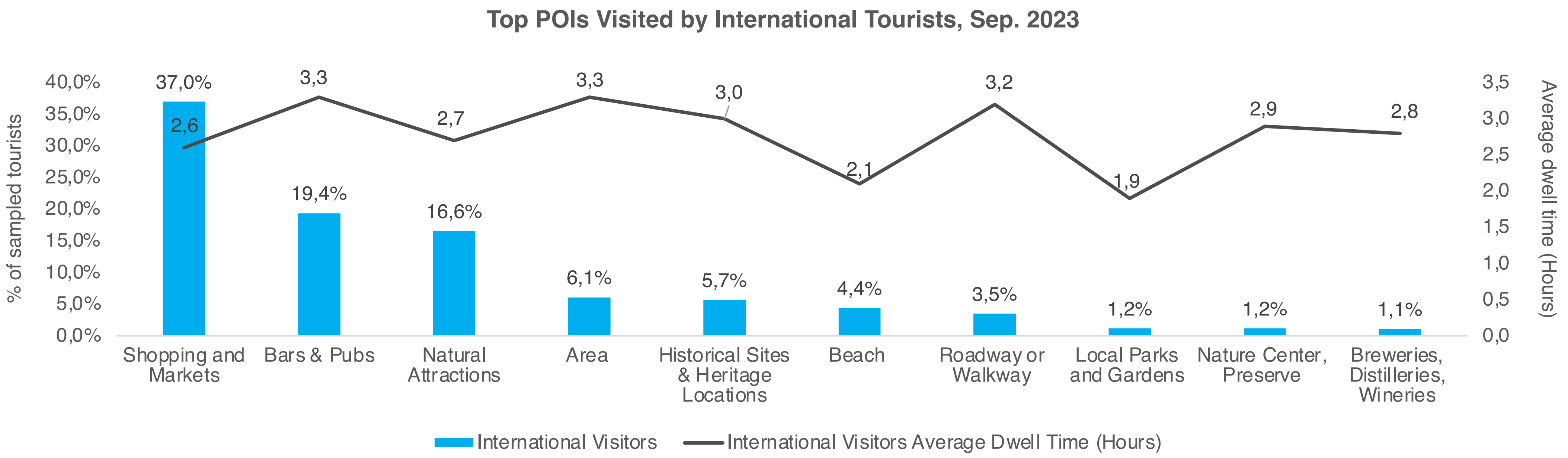
- Shopping and markets were the most popular type of attraction visited by domestic tourists with an average dwell time of 2.2 hours.
- Natural attractions ranked as the 2nd most popular point of interest among domestic tourists.
- Bars and pubs were the 3rd most popular point of interest and domestic tourists spent an average of 3.2 hours at the location.
- Beach was the 4th most popular point of interest and domestic tourists spent an average of 2.2 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 domestic tourists, with an average dwell time of 3.1 hours.



Source: Rove, 2023

Points of Interest (POIs) Visited: International Tourists

- Shopping and markets were the most popular type of attraction visited by domestic tourists with an average dwell time of 2.6 hours.
- Bars and pubs were the 2nd most popular point of interest and domestic tourists spent an average of 3.3 hours at the location.
- Natural attractions ranked as the 3rd most popular point of interest among domestic tourists, with an average dwell time of 2.7 hours.
- Spending time in areas like Cederberg Wilderness, Stanford Valley, Hemel-en-Aarde Valley, and Van Dyk's Bay ranked 4th amongst the top POIs visited by domestic tourists, with an average dwell time of 3.3 hours.
- Historical sites and heritage locations ranked the 5th most popular point of interest among domestic tourists, with an average dwell time of 3.0 hours.



Source: Rove, 2023

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:

- 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:

- 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:

- 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?

- **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

Source: Rove, 2023

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, an d 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 a s “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 t he geography.

Source: Rove, 2023