



Tourism Research Overview April 2024

Cape Town & the Western Cape

WESGRO

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

An Inspiring Place To Do Business

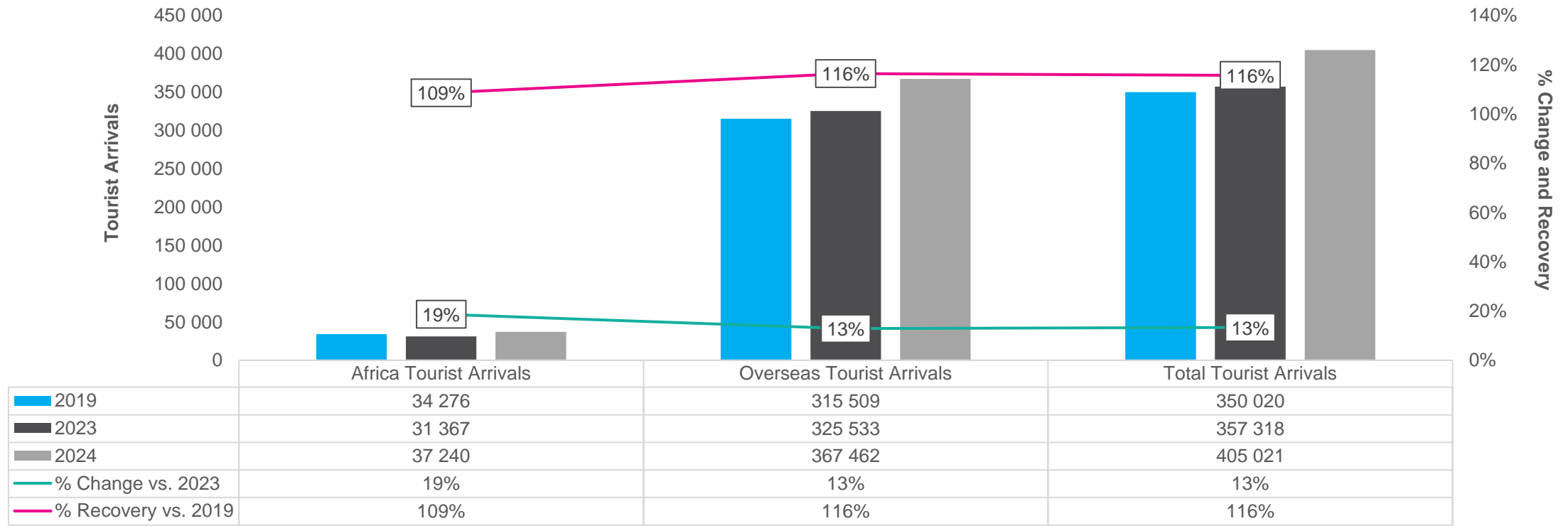
Key Findings

- Tourist arrivals to Cape Town (via air) maintain a positive trend moving into the second quarter of 2024. Air arrivals to Cape Town recorded a 13% year-on-year increase over the period Jan to Apr 2024, reaching 405,021 tourists and exceeding the 2019 figure of 350,020 (Jan – Apr). Across the Jan – Apr 2024 period, 91% of air arrivals to Cape Town were from overseas markets and 9% were from the rest of Africa. (Source: StatsSA)
- Between Jan and Apr 2024, UK led as the top overseas air market to Cape Town, with Germany a very close second, followed by USA, Netherlands and France in the rest of the top 5 positions. The first four months of 2024 reflected a strong European presence, with 7 out of the top 10 source markets originating from the continent. Overseas air arrivals to Cape Town during the period Jan – Apr 2024 reflected full recovery from 8 out of the top 10 source markets to Cape Town vs. Jan – Apr 2019. These markets include the UK, Germany, USA, Netherlands, Canada, Belgium and Australia. (Source: StatsSA)
- Over the same period, Namibia led as the top air market from the rest of Africa to Cape Town, with Zimbabwe following in second position. Angola, Kenya and Mozambique followed in the rest of the top 5 positions. Air arrivals to Cape Town from the rest of Africa during the period Jan – Apr 2024 reflected full recovery from 8 out of the top 10 source markets to Cape Town vs. Jan – Apr 2019. These markets included Zimbabwe, Kenya, Mozambique, Mauritius, Nigeria, Ghana, Botswana and Tanzania. (Source: StatsSA)
- CTIA's **international terminal** saw a 12% year-on-year growth over the period Jan – Apr 2024, with over 1,158,000 two-way passengers moving through the terminal. Similarly, the **domestic terminal** also recorded a 12% year-on-year growth over the period Jan – Apr 2024, with over 2,430,000 two-way passengers passing through the domestic terminal. George Airport recorded 264,571 two-way passengers between Jan and Apr 2024 and in relation to the same period in 2019, the year-to-date passenger movement between Jan and Apr 2024 recovered by 98%. (Source: ACSA)
- 53 participating attractions across the six regions of the Western Cape recorded a total of 3,206,546 visitors between Jan and Apr 2024, a 17% growth in the number of visitors when compared to Jan – Apr 2023. The top 5 participating Western Cape attractions with the highest volume of visitors between Jan and Apr 2024 were recorded for: Table Mountain National Park (1,176,683), Table Mountain Aerial Cableway (425,515), Table Mountain National Park: Cape of Good Hope (371,620), Table Mountain National Park: Boulders (319,766), Kirstenbosch National Botanical Garden (251,301).
- The top 5 highest year-on-year growth rates for the period Jan – Apr 2024 were recorded amongst the Western Cape's nature/outdoor attractions: Stony Point Eco Venue (383%), De Hoop Nature Reserve (331%), Walker Bay Nature Reserve (224%), Kogelberg Nature Reserve (202%), Swartberg Nature Reserve (169%)

Performance of Air Arrivals to Cape Town: Jan – Apr 2024

- Tourist arrivals to Cape Town (via air) recorded a 13% year-on-year increase over the period January to April 2024, reaching 405,021 tourists and exceeding the 2019 figure of 350,020 (Jan – Apr). Across the Jan – Apr 2024 period, 91% of air arrivals to Cape Town were from overseas markets and 9% were from the rest of Africa.

Tourist Arrivals to Cape Town (via air) by Origin, Jan - Apr 2024

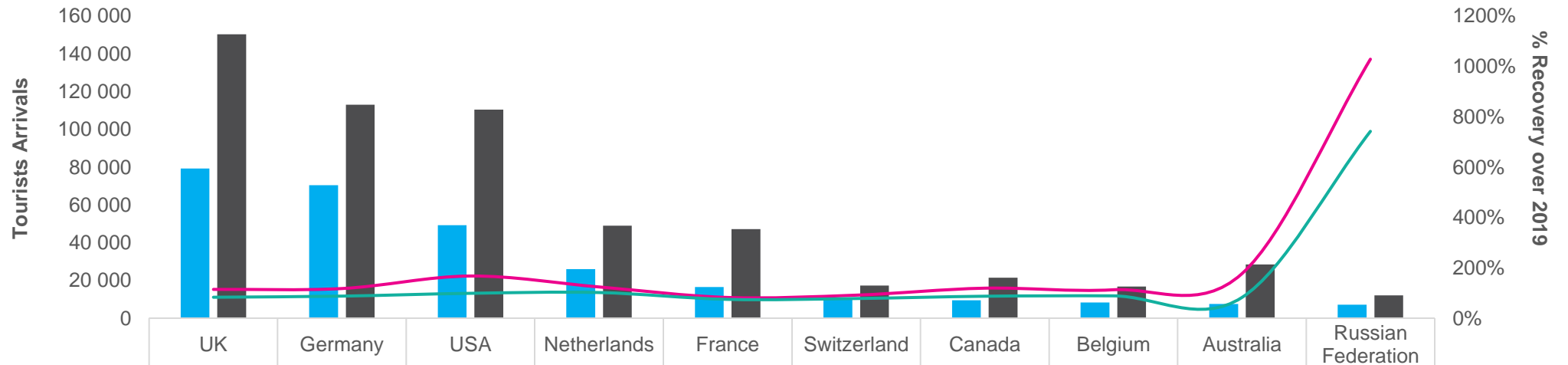


Source: StatsSA, 2024

Top Overseas Markets to Cape Town (via air): Jan – Apr 2024

- Between January and April 2024, UK led as the top overseas air market to Cape Town, with Germany a very close second, followed by USA, Netherlands and France in the rest of the top 5 positions. The first four months of 2024 reflected a strong European presence, with 7 out of the top 10 source markets originating from the continent.
- Overseas air arrivals to Cape Town during the period Jan – Apr 2024 reflected full recovery from 8 out of the top 10 source markets to Cape Town vs. Jan – Apr 2019. These markets include the UK (115%), Germany (119%), USA (168%), Netherlands (125%), Canada (120%), Belgium (114%) and Australia (177%).

Tourist Arrivals to Cape Town (via air) and South Africa, Jan - Apr 2024



	UK	Germany	USA	Netherlands	France	Switzerland	Canada	Belgium	Australia	Russian Federation
■ Cape Town (via air)	79 298	70 479	49 303	25 984	16 582	9 845	9 486	8 337	7 556	7 179
■ South Africa	150 411	113 085	110 428	49 048	47 166	17 385	21 452	16 861	28 467	12 105
— Cape Town % Recovery	115%	119%	168%	125%	83%	92%	120%	114%	177%	1029%
— SA % Recovery	84%	88%	100%	103%	75%	79%	88%	89%	83%	742%

Source: StatsSA, 2024

Top Africa Markets to Cape Town (via air): Jan – Apr 2024

- Between January and April 2024, Namibia led as the top air market from the rest of Africa to Cape Town, with Zimbabwe following in second position. Angola, Kenya and Mozambique followed in the rest of the top 5 positions.
- Air arrivals to Cape Town from the rest of Africa during the period Jan – Apr 2024 reflected full recovery from 8 out of the top 10 source markets to Cape Town vs. Jan – Apr 2019. These markets included Zimbabwe, Kenya, Mozambique, Mauritius, Nigeria, Ghana, Botswana and Tanzania.

Ranking	Source Market	Tourists to Cape Town (via air) Jan - Apr 2024	Tourists to South Africa Jan - Apr 2024	Cape Town % Recovery vs. 2019	South Africa % Recovery vs. 2019
1	Namibia	6 250	51 726	67%	80%
2	Zimbabwe	5 642	813 928	142%	99%
3	Angola	4 678	13 329	52%	54%
4	Kenya	3 844	14 273	213%	144%
5	Mozambique	3 385	536 896	9956%	114%
6	Mauritius	2 127	6 294	104%	83%
7	Nigeria	1 464	7 551	139%	50%
8	Ghana	1 337	10 523	394%	167%
9	Botswana	1 309	119 396	229%	57%
10	Tanzania	1 306	11 663	168%	96%

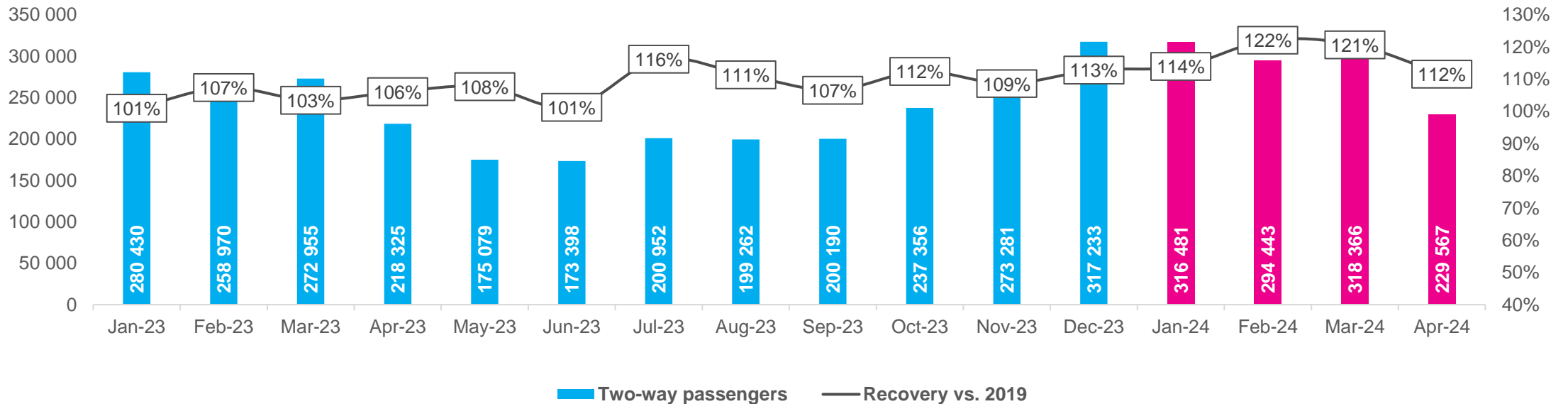
Cape Town International Airport (CTIA): International Terminal

Year/Month	2019	2020	2021	2022	2023	2023		2024				2024 ytd
						Nov	Dec	Jan	Feb	Mar	Apr	
Two-way passengers	2 606 398	810 811	525 441	1 895 975	2 807 431	273 281	317 233	316 481	294 443	318 366	229 567	1 158 857
YoY growth percentage*	1%	-69%	-35%	261%	48%	29%	17%	13%	14%	17%	5%	12%

* Growth compared to the same period in the previous year

Passenger data source: ACSA

Recovery percentage full year 2023 = 108%
Recovery percentage year-to-date 2024 = 117%



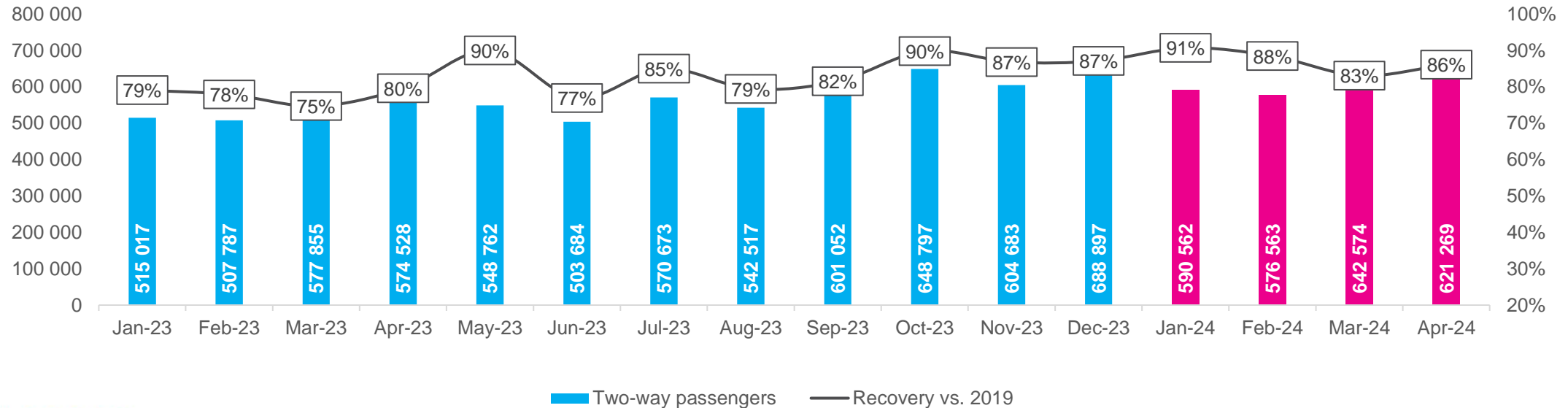
Cape Town International Airport (CTIA): Domestic Terminal

Year/Month	2019	2020	2021	2022	2023	2023		2024				2024 ytd
						Nov	Dec	Jan	Feb	Mar	Apr	
Two-way passengers	8 363 307	3 167 542	4 221 365	5 960 826	6 884 252	604 683	688 897	590 562	576 563	642 574	621 269	2 430 968
YoY growth percentage*	2%	-62%	33%	41%	16%	19%	21%	15%	14%	11%	8%	12%

* Growth compared to the same period in the previous year

Passenger data source: ACSA

Recovery percentage full year 2023 = **82%**
 Recovery percentage year-to-date 2024 = **87%**



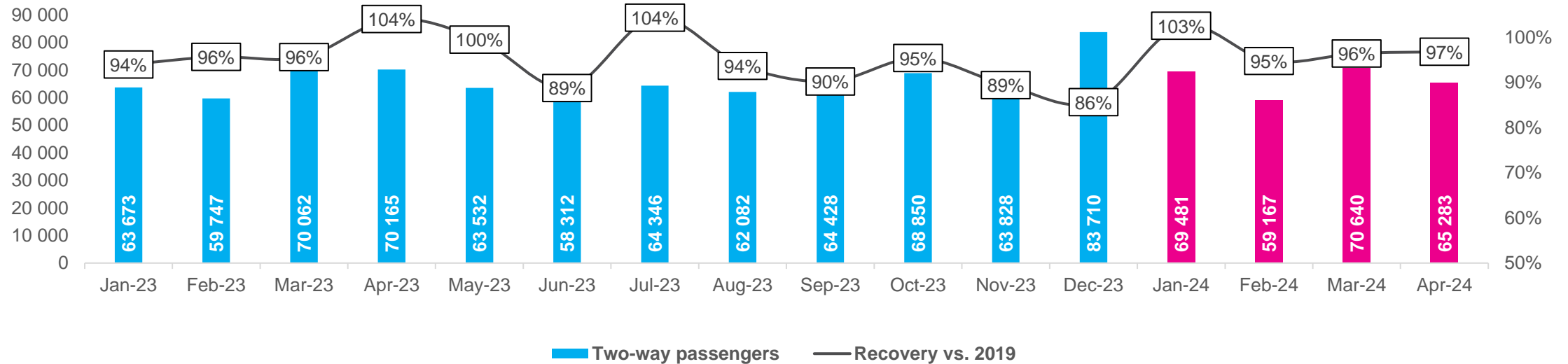
George Airport (GRJ): Passenger performance: Jan – Apr 2024

Year/Month	2019	2020	2021	2022	2023	2024				2024 Ytd		
						Nov	Dec	Jan	Feb		Mar	Apr
Two-way passengers	840 804	346 223	539 637	747 848	792 735	63 828	83 710	69 481	59 167	70 640	65 283	264 571
YoY change percentage*	0.5%	-59%	56%	39%	6%	7%	31%	9%	-1%	1%	-7%	0,4%

* Growth compared to the same period in the previous year

Data source: ACSA



Recovery percentage full year 2023 = **95%**
 Recovery percentage year-to-date 2024 = **98%**









CPT International schedule for IATA Summer 2024 (April - October)

23 airlines, 27 destinations & 175 flights per week




Rest of Africa

	Air Botswana	Gaborone (GBE) 3x per week
	Air Mauritius	Mauritius (MRU) 2x week
	Airlink	Windhoek (WDH) 19x pw Walvis Bay (WVB) 13x pw Harare (HRE) Daily Victoria Falls (VFA) 6x week Maun (MUB) Daily
	Eswatini Air	Manzini (SHO) 3x week
	Ethiopian Airlines	Addis Ababa (ADD) 11x per week
	FlyNamibia	Windhoek (WDH) 4x per week Walvis Bay (WVB) 4x per week
	Kenya Airways	Nairobi (NBO) 3x week, NBO – Livingstone (LVI) 3x week NBO – Victoria Falls (VFA) 3x week
	LAM	Maputo (MPM) 3x per week
	Proflight Zambia	Lusaka (LUN) 3x week
	RwandAir	Kigali (KGL) - Harare (HRE) 6x week
	TAAG	Luanda (LAD) Daily




Europe

	British Airways	London Heathrow (LHR) Daily
	Condor	Frankfurt (FRA)* 5x per week <i>* Until Mid-April</i>
	Edelweiss	Zurich (ZRH)* 4x per week <i>*Until 1 May 2024</i>
	KLM	Amsterdam (AMS) Daily
	Lufthansa	Frankfurt (FRA) 5x per week
	Turkish Airlines	Istanbul (IST) Daily

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

Asia & Middle East

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

IATA Summer route network (April 2024 – 26 October 2024)

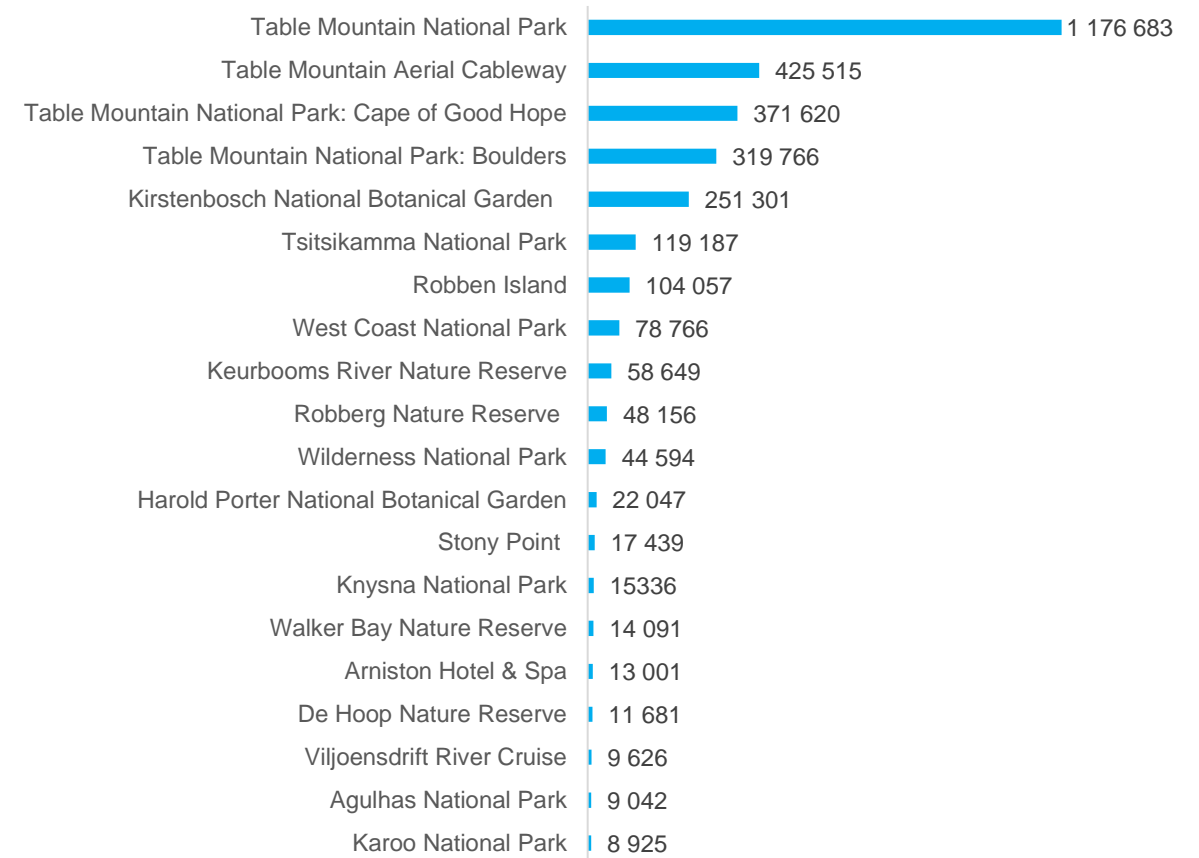


Source: OAG

Performance of Western Cape Attractions: Jan – Apr 2024

- 53 participating attractions across the six regions of the Western Cape recorded a total of 3,206,546 visitors between January and April 2024, a 17% growth in the number of visitors when compared to January–April 2023.
- The top 5 participating Western Cape attractions with the highest volume of visitors between January and April 2024 were recorded for:
 1. Table Mountain National Park (1,176,683)
 2. Table Mountain Aerial Cableway (425,515)
 3. Table Mountain National Park: Cape of Good Hope (371,620)
 4. Table Mountain National Park: Boulders (319,766)
 5. Kirstenbosch National Botanical Garden (251,301)
- The top 5 highest year-on-year growth rates for the period January to April 2024 were recorded amongst the Western Cape’s nature/outdoor attractions:
 1. Stony Point Eco Venue (383%)
 2. De Hoop Nature Reserve (331%)
 3. Walker Bay Nature Reserve (224%)
 4. Kogelberg Nature Reserve (202%)
 5. Swartberg Nature Reserve (169%)

Top 20 Participating Western Cape Attractions Jan–Apr. 2024



Performance of Western Cape Attractions: Jan–Apr 2024

Continued...

Western Cape Attractions	Q1 2023	Q1 2024	Q1 2023 / Q1 2024 % Change
Cape Town			
Table Mountain National Park	1 000 547	1 176 683	18%
Table Mountain Aerial Cableway	377 189	425 515	13%
Table Mountain National Park: Cape of Good Hope	331 204	371 620	12%
Table Mountain National Park: Boulders	261 305	319 766	22%
Kirstenbosch National Botanical Garden	260 912	251 301	-4%
Robben Island	93 712	104 057	11%
Total	2 324 869	2 648 942	14%
Overberg			
Harold Porter National Botanical Garden	14 111	22 047	56%
Stony Point	7 449	17 439	134%
Walker Bay Nature Reserve	4 355	14 091	224%
Arniston Hotel & Spa	8 702	13 001	49%
De Hoop Nature Reserve	2 708	11 681	331%
Agulhas National Park	6 415	9 042	41%
Cape Agulhas Lighthouse	6 118	7 898	29%
Bontebok National Park	4 570	6 120	34%
Kogelberg Nature Reserve	1 957	5 907	202%
Grootvadersbosch Nature Reserve	2 387	3 234	35%
Marloth Nature Reserve	1 869	2 970	59%
Shipwreck Museum	566	1 109	96%
The Whale Trail	632	940	49%
Panthera Africa	825	743	-10%
Stony Point Eco Venue	80	386	383%
Elim Heritage Centre	330	381	15%
Grootvadersbosch Eco Venues	409	261	-36%
De Mond Nature Reserve	1 669	196	-88%
Total	65 152	117 446	80%
Garden Route & Klein Karoo			
Tsitsikamma National Park	100 675	119 187	18%
Keurbooms River Nature Reserve	32 932	58 649	78%
Robberg Nature Reserve	37 689	48 156	28%
Wilderness National Park	40 192	44 594	11%
Knysna National Park	13 203	15 336	16%
Goukamma Nature Reserve	882	818	-7%
Outeniqua Nature Reserve	3	2	-33%
Total	225 576	286 742	27%

Weskus	Q1 2023	Q1 2024	Q1 2023 / Q1 2024 % Change
West Coast National Park	48 837	78 766	61%
Khwattu	7 625	7 695	1%
Cederberg-Algeria Nature Reserve	5 909	7 187	22%
Matjiesrivier Nature Reserve	3 845	5 552	44%
Bird Island Nature Reserve	3 735	4 511	21%
Groot Winterhoek Wilderness Area	1 618	1 967	22%
Cederberg-Kliphuis Nature Reserve	530	719	36%
Rocherpan Nature Reserve	645	608	-6%
Total	72 744	107 005	47%
Cape Winelands			
Viljoensdrift River Cruise	6 604	9 626	46%
Limietberg Nature Reserve	10636	8 832	-17%
Avalon Springs	2 406	5 524	130%
Birds Paradise	2 333	3 383	45%
Vrolijkheid Nature Reserve	2111	2 331	10%
Jonkershoek Nature Reserve	3 725	2 224	-40%
Hottentots Holland Nature Reserve	1 426	1 772	24%
Protea Tractor Trip	1 537	1 239	-19%
Assegaaibosch Nature Reserve	625	1 128	80%
Vrolijkheid Eco Venue	129	254	97%
Total	31 532	36 313	15%
Cape Karoo			
Karoo National Park	9 536	8 925	-6%
Gamkaberg Nature Reserve	439	752	71%
Anysberg Nature Reserve	188	308	64%
Swartberg Nature Reserve	42	113	169%
Total	10 205	10 098	-1%
Total for all Attractions in Q1 2023 & Q1 2024	2 730 078	3 206 546	17%

NB: Total number of visitors ranked from highest to lowest by region

Sources: LTOs, CapeNature and SANParks (2024)

Visitor Trends Mobile Location Data Insights

Jan – Apr 2024

Western Cape Mobile Location Data Insights

What is mobile location data?

- This is 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 anonymised 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 regions.
- Mobile location data serves as a sample. It does not represent 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.

Factors influencing the International and Domestic Sample Counts:

The volume of mobile location data capture counts is influenced by several factors including but not limited to:

Data Source Variability

- Changing volume of mobile applications collecting and sharing data
- Data privacy and regulatory changes affecting sharing of data (GDPR, mobile OS policy changes etc.)

Data Collection and Processing Variability

- Mobile network and internet connectivity
- Mobile infrastructure technical issues (hardware failures, solar flare activity)
- Tourist logic to segment tourist from non-tourist mobile devices

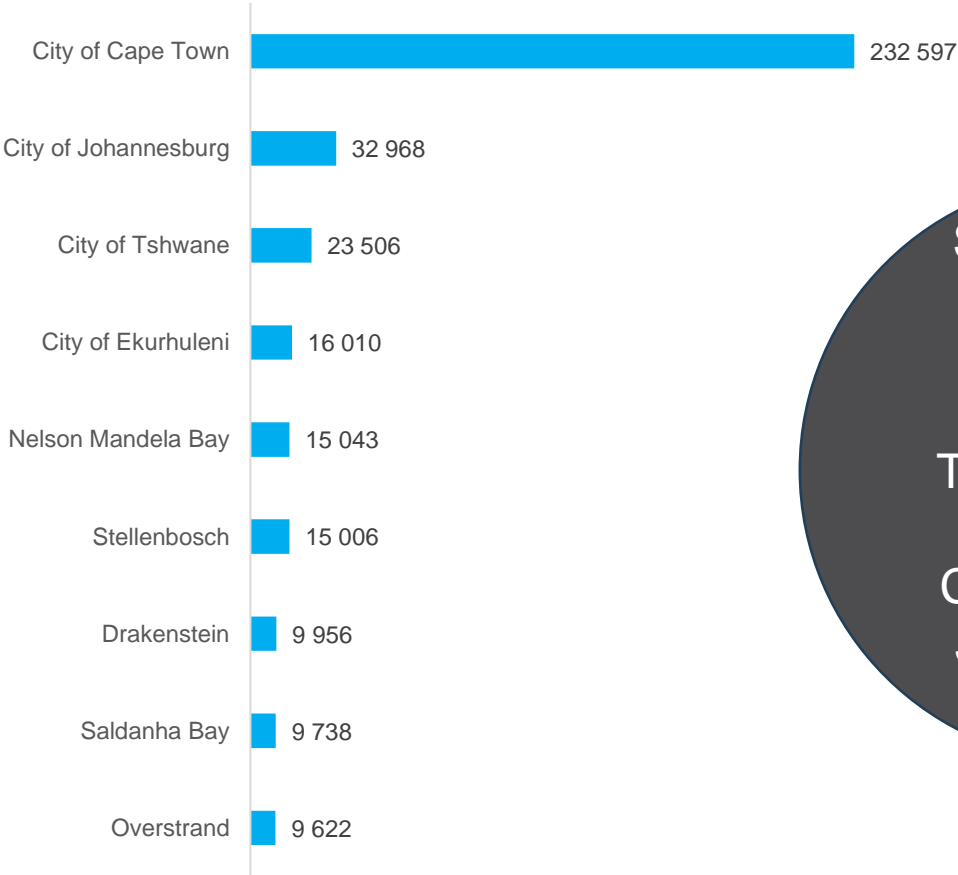
Mobile Use Variability

- Tourists disabling data transmission services due to high international data costs
- Tourists not using partnership apps as often.

While all mobile devices are affected by above, International mobile device counts are affected more than Domestic mobile devices when it comes to both mobile use fluctuations and data privacy restrictions. Tourists use their phones differently when travelling internationally – they may want to avoid additional out of country fees and only use their phone through wi-fi service. Tourists may not use the partnership apps they normally do while on extensive holiday. Restricting data privacy laws are also affecting the international landscape affecting data that can be shared which may affect processing that identifies tourists.

Mobile Insights: Domestic Visitor Trends

Domestic Origin Municipality, Jan–Apr. 2024



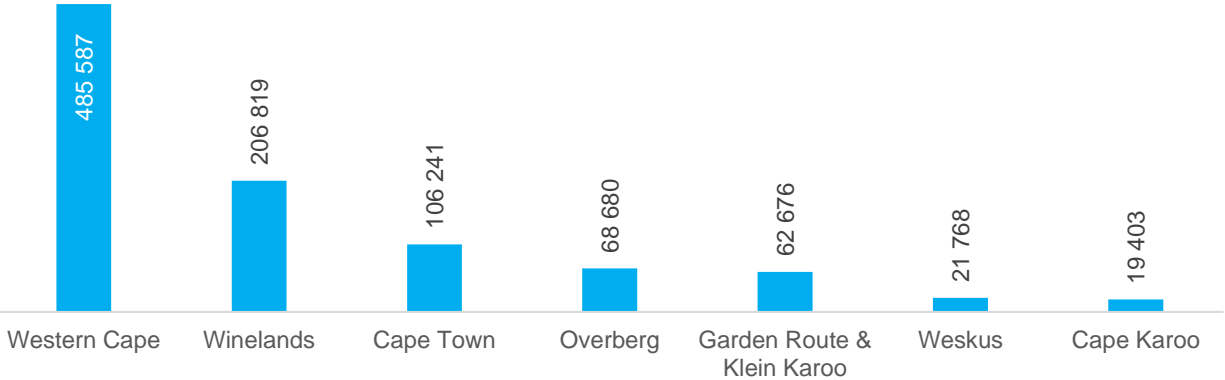
Sample Size:
485,587
Domestic
Tourists visited
the Western
Cape between
Jan and April
2024

Within the sample of 485,587 domestic tourists who have visited the Western Cape between January and April 2024, **232,597 of the sampled tourists were from Cape Town, 32,968 from the City of Johannesburg, 23,506 from the City of Tshwane, 16,010 from the City of Ekurhuleni, and 15,043 from Nelson Mandela Bay.**

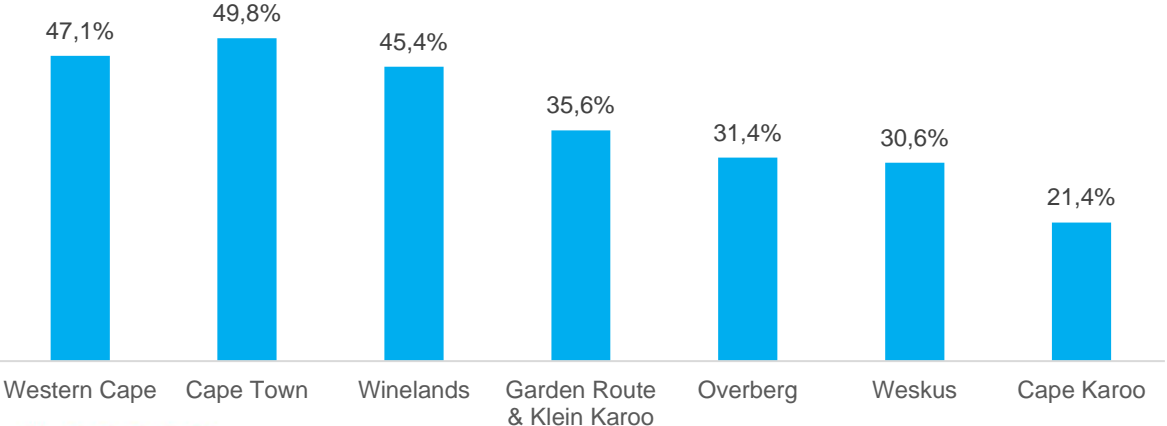
Source: Rove (2024)

Mobile Insights: Domestic Visitor Trends

Domestic Sample Size, Jan–Apr. 2024



Domestic Repeat Visitors, Jan–Apr. 2024



The Western Cape province experienced a significant increase in visitors, with a total of 485,587 tourists. Out of this number, 47.1% of visitors returned for another visit.

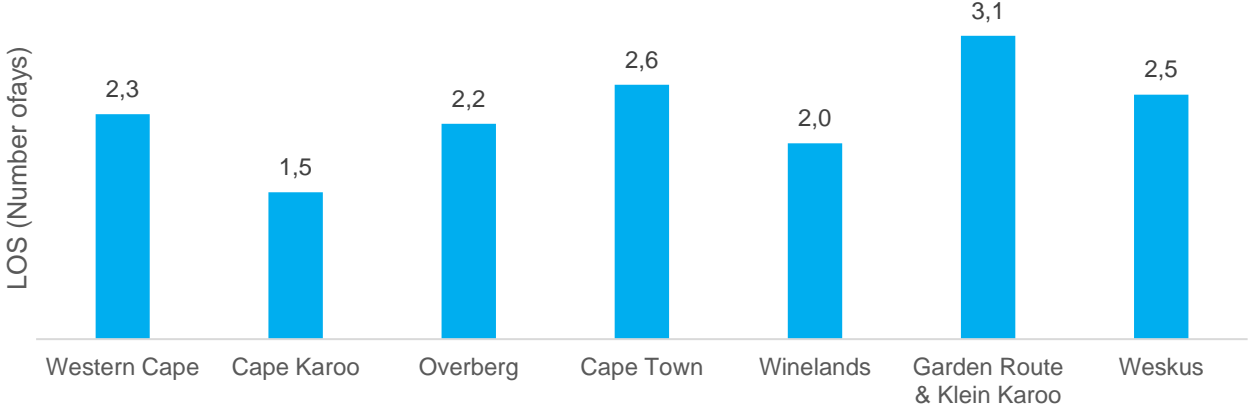
The most popular destinations within the province during this period were the Winelands (206,819 tourists), Cape Town (106,241), Overberg (68,680), and Garden Route & Klein Karoo (62,676).

Cape Town and Winelands emerged as the most popular regions for domestic repeat visits, with 49.8% and 45.4% of tourists returning to these regions.

The Cape Karoo region welcomed 19,403 visitors in the period between January and April 2024, and 21.4% of the visitors returned for another visit.

Mobile Insights: Domestic Visitor Trends

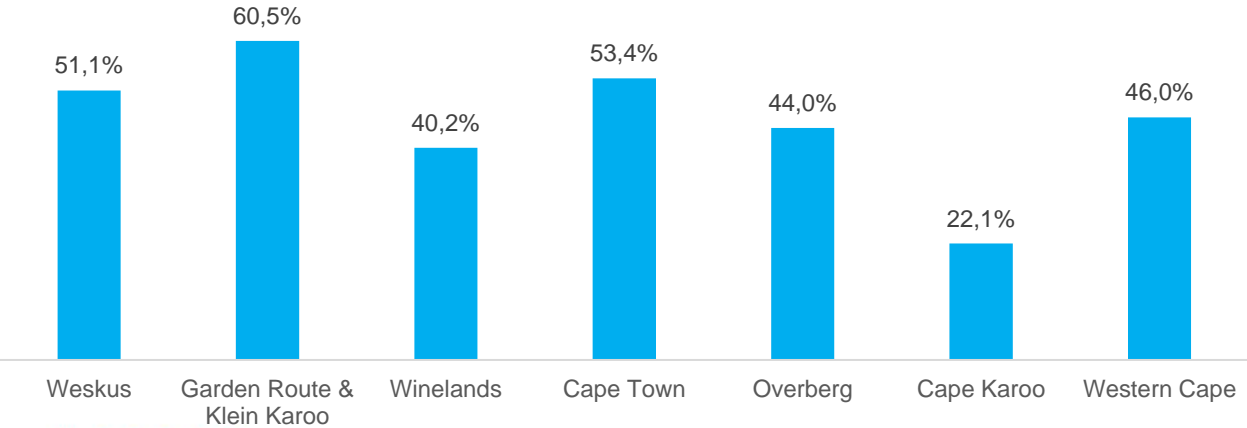
Average Length of Stay (LOS), Jan–Apr. 2024



Domestic tourists who visit the Western Cape tend to spend the longest time in some of the most popular tourist destinations.

The top three destinations where the average tourist stay duration is maximum are the Garden Route & Klein Karoo (3.1 days), Cape Town (3.1 days), and Weskus (2.5 days).

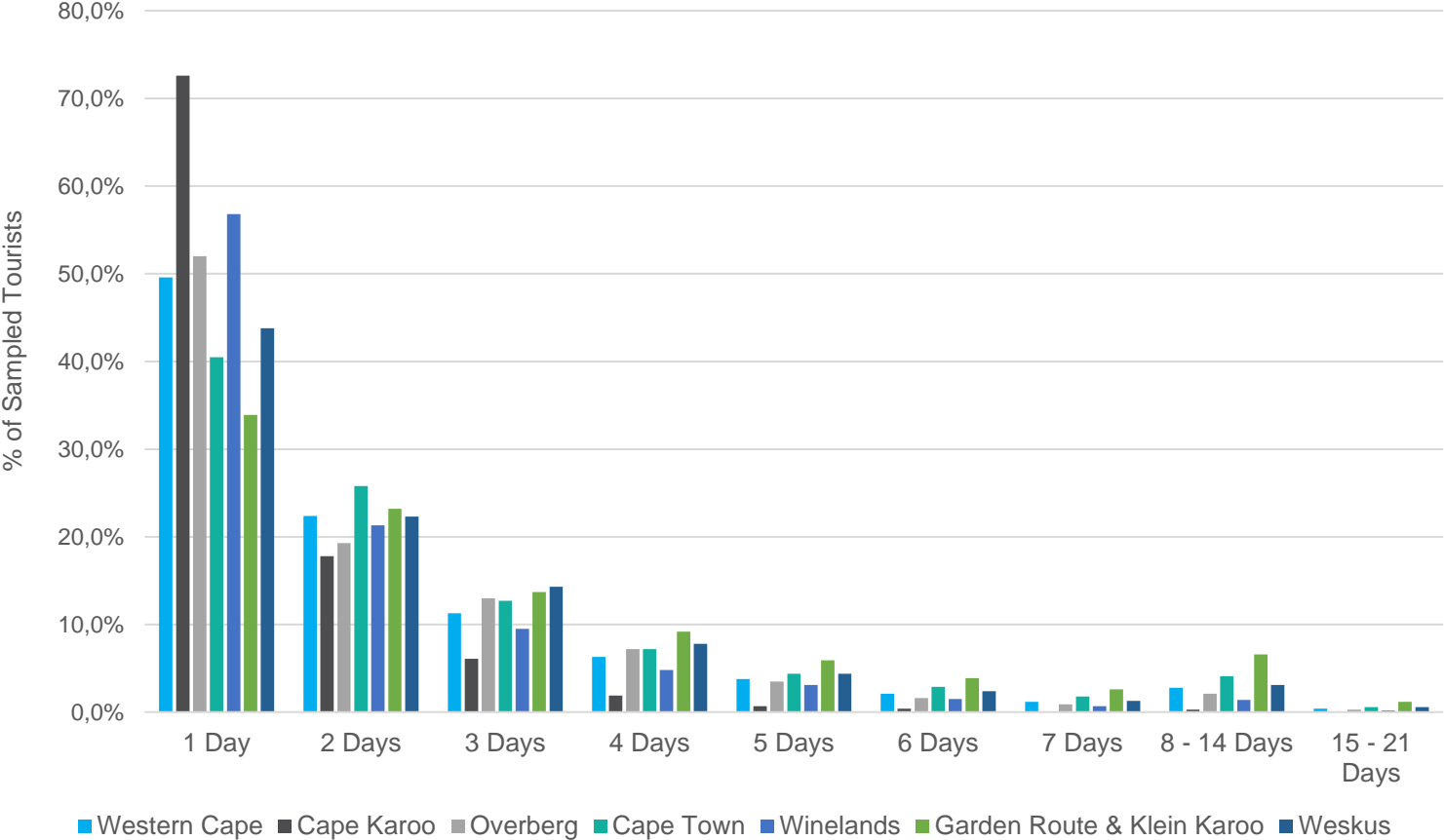
% Overnight Stays, Jan–Apr. 2024



60.5% of sampled tourists prefer to stay overnight in the Garden Route & Klein Karoo, 53.4% in Cape Town and 46.0% choose Weskus as their preferred destination for an overnight stay.

Mobile Insights: Domestic Visitor Trends

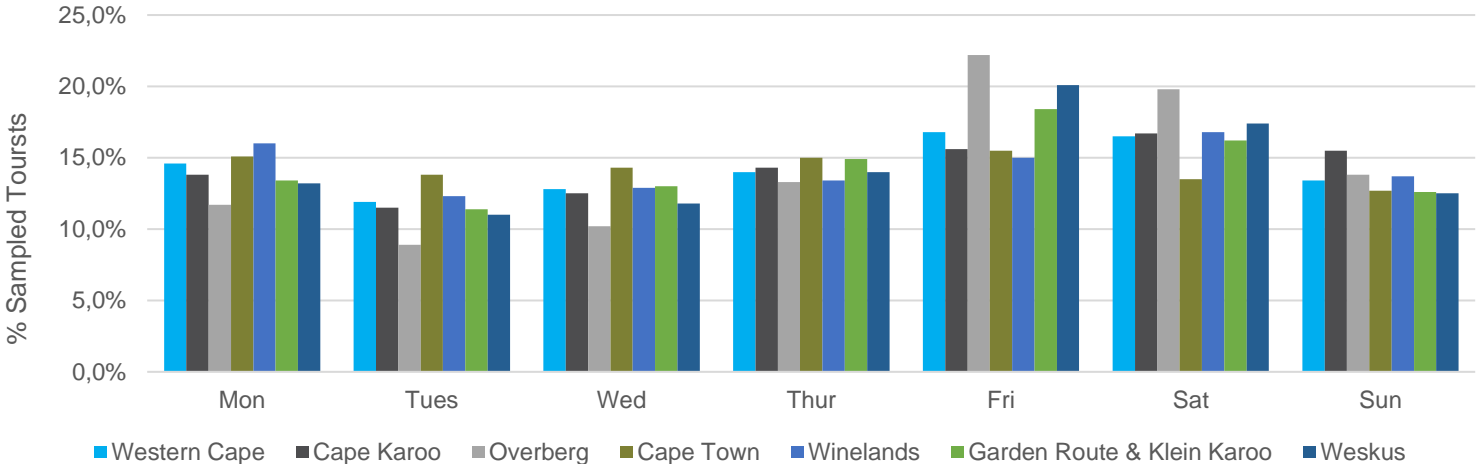
Average Length of Stay (Number of Days): Domestic, Jan–Apr. 2024



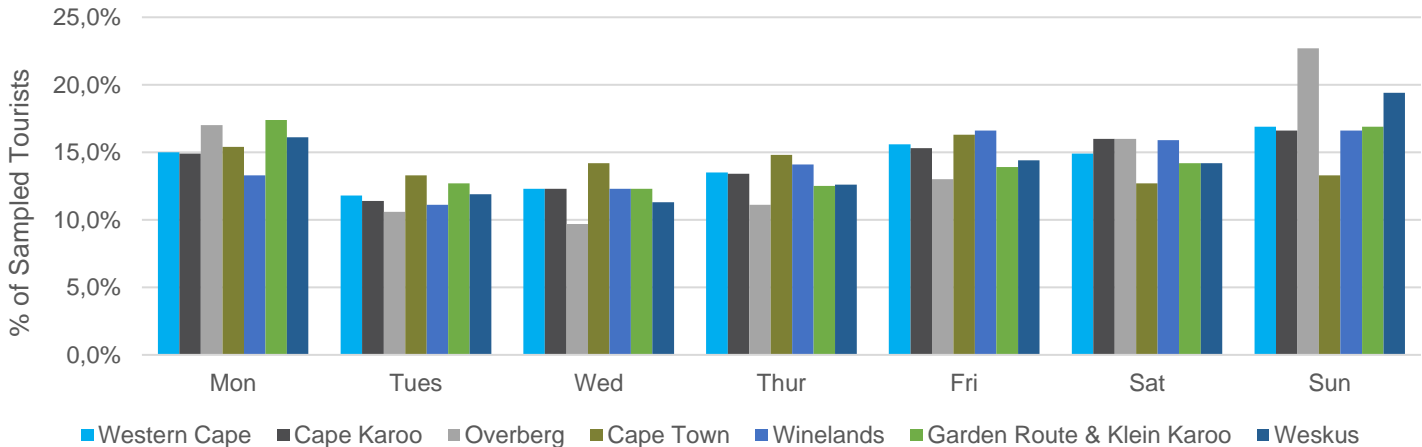
The mobile data insights show that **domestic tourists stayed between 1 and 3 days in the province and all regions** between January and April 2024.

Mobile Insights: Domestic Visitor Trends

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



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



From January to April 2024, the analysis of mobile data showed a consistent pattern in the choice of arrival and departure days in the Western Cape.

Cape Karoo

Arrival – Saturday; Departure – Sunday

Overberg

Arrival – Friday; Departure – Sunday

Cape Town

Arrival – Monday; Departure – Friday

Winelands

Arrival – Saturday; Departure – Friday

Garden Route & Klein Karoo

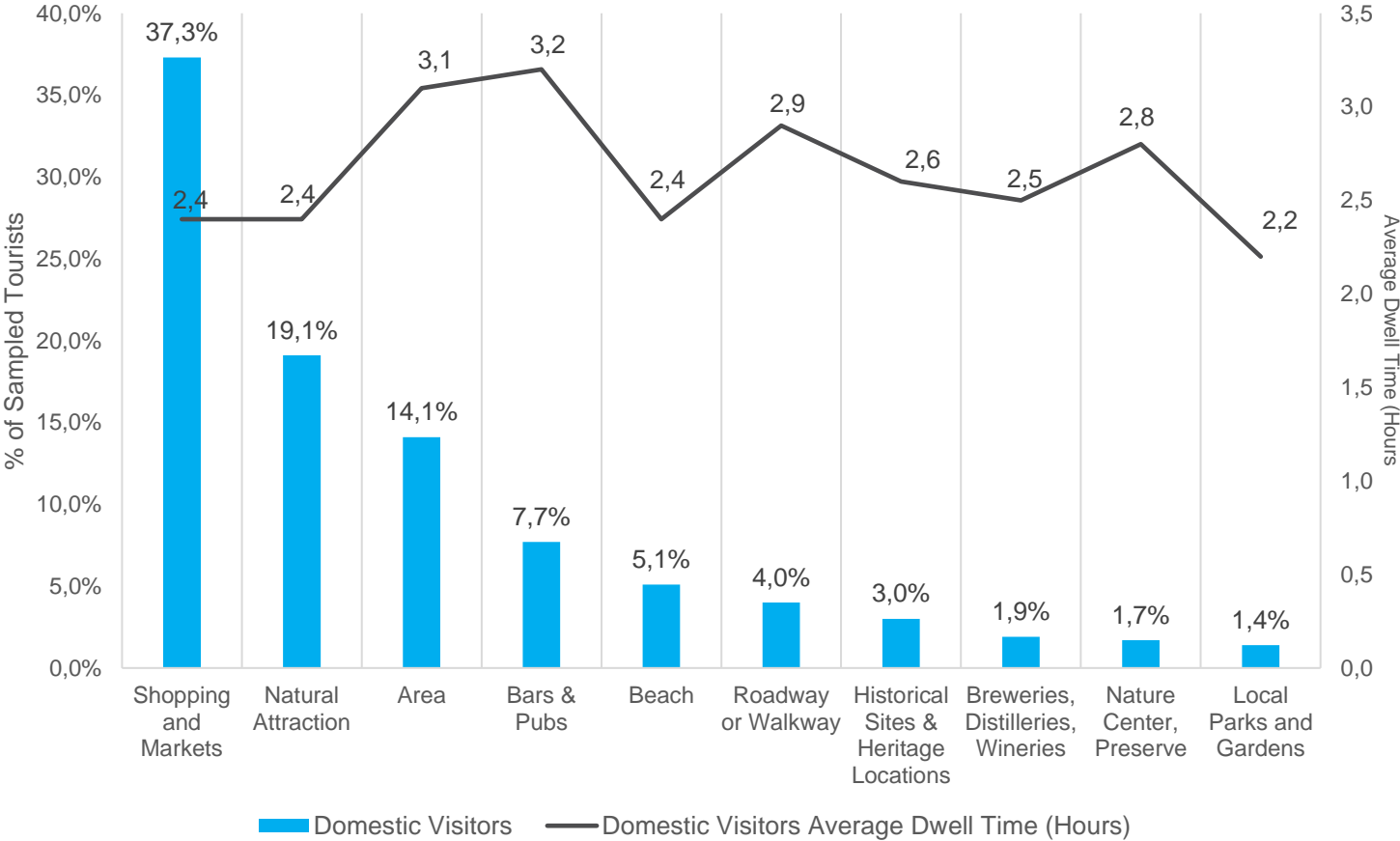
Arrival – Friday; Departure – Monday

Weskus

Arrival – Friday; Departure – Sunday

Mobile Insights: Domestic Visitor Trends

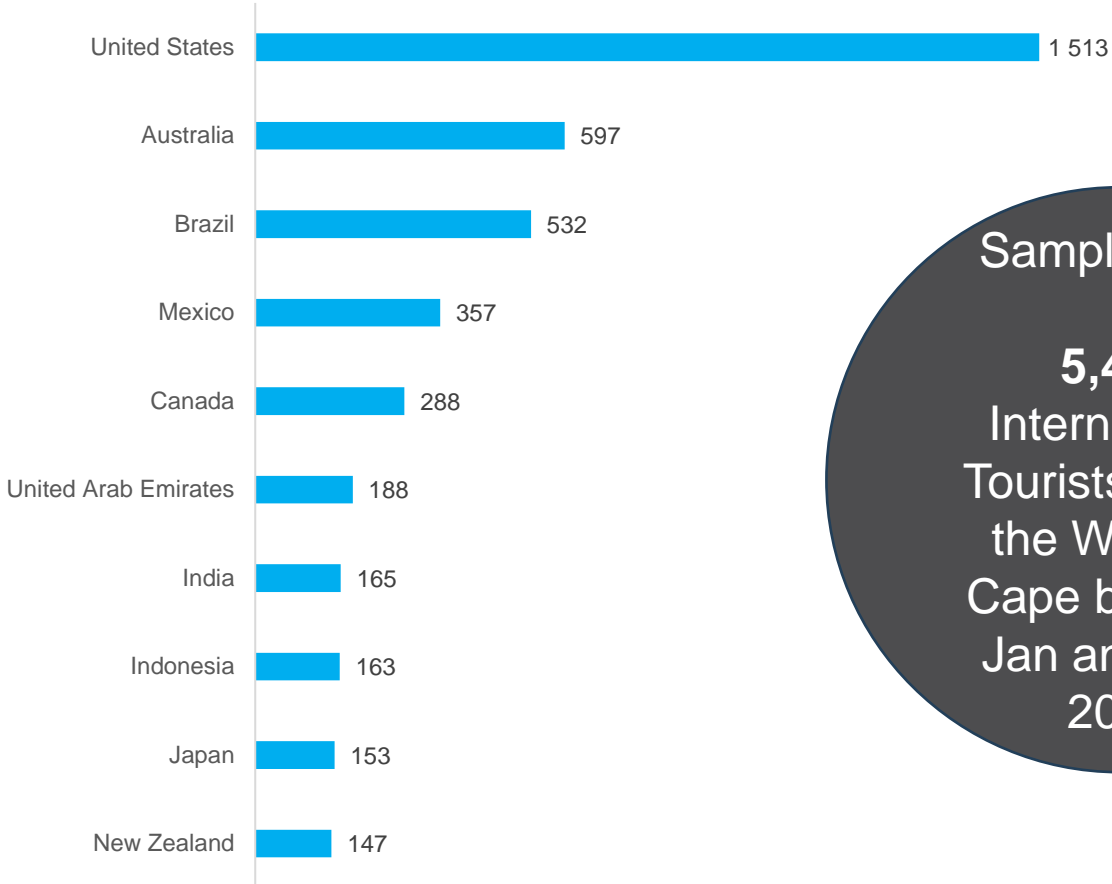
Top POIs Visited by Domestic Tourists, Jan–Apr. 2024



- Top 3 Points of Interest (POIs)
- 1. Shopping and markets** were the most popular types of attraction visited by **19,779 domestic tourists** with an **average dwell time of 2.4 hours**.
 - 2. Natural attractions** ranked as the 2nd most popular point of interest among **10,134 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 **7,465 domestic tourists**, with an **average dwell time of 3.1 hours**.

Mobile Insights: International Visitor Trends

International Origin Country, Jan–Apr. 2024

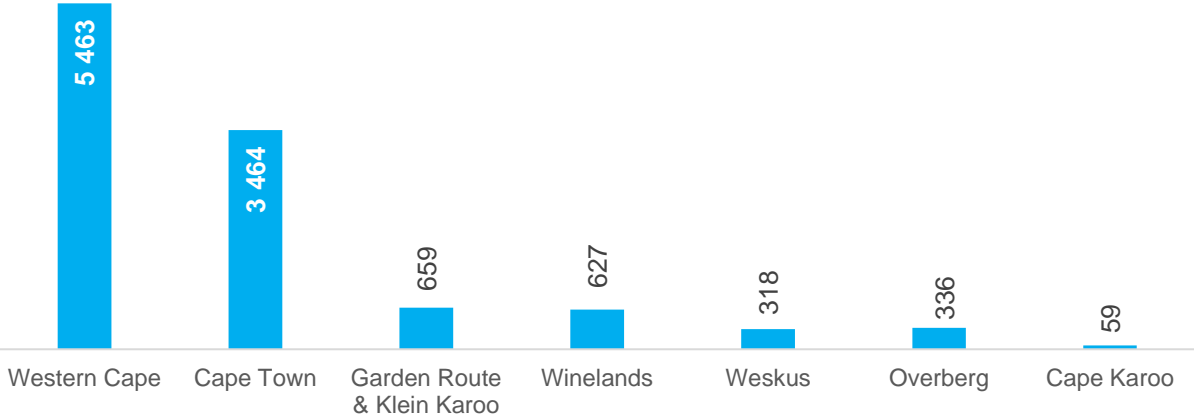


Sample Size:
5,463
International
Tourists visited
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2024

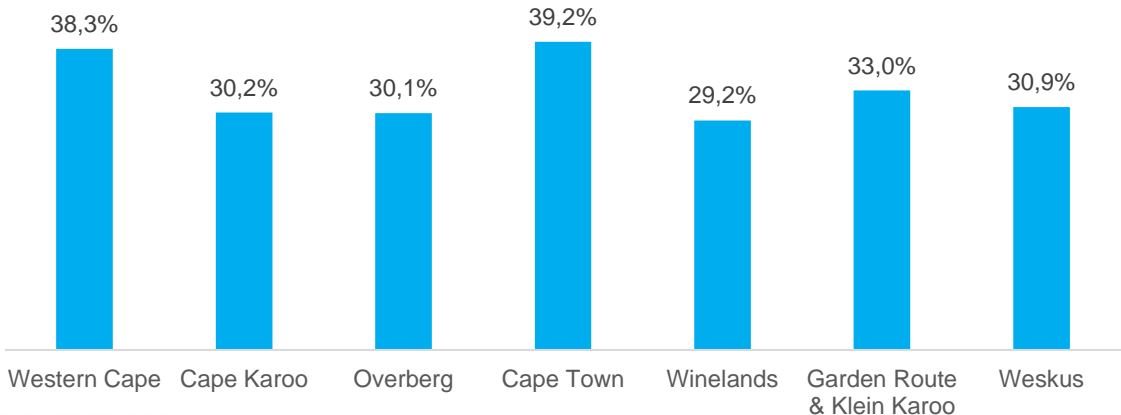
Within the sample of 5,463 international tourists who visited the Western Cape between January and April 2024, **1,513 of the sampled tourists were from the US, 597 were from Australia, 532 were from Brazil, 357 were from Mexico, 288 were from Canada, and 188 were from the United Arab Emirates.**

Mobile Insights: International Visitor Trends

International Sample Size, Jan–Apr. 2024



International Tourists Repeat Visits, Jan–Apr. 2024



The Western Cape province experienced a significant increase in visitors, with a total of 5,463 International tourists. Out of this number, 38.9% of visitors returned for another visit.

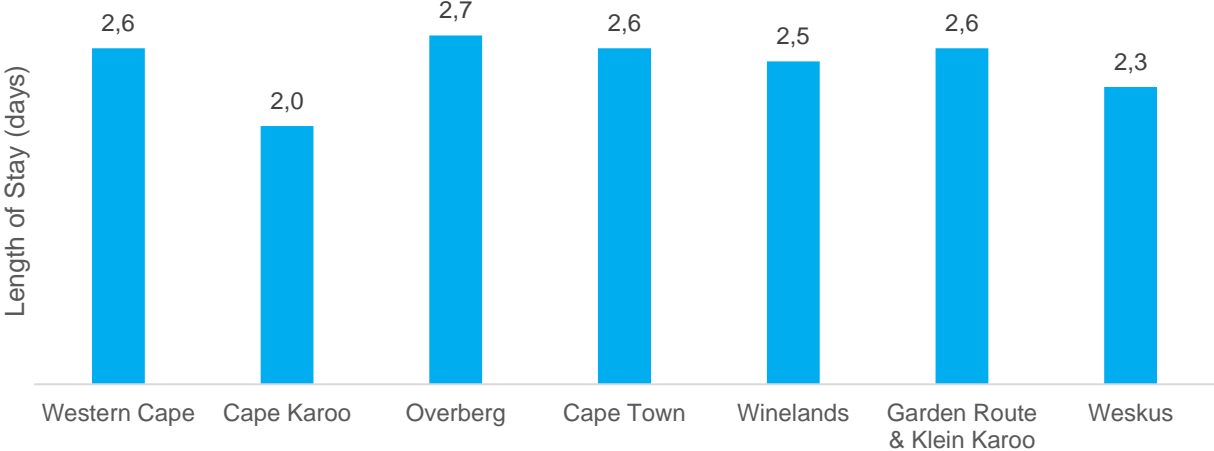
The most popular destination within the province during this period was Cape Town (3,464 tourist arrivals).

Between January and April 2024, Cape Town saw an impressive return rate of close to 40%, indicating high visitor satisfaction and repeat visits. Following closely behind were Weskus with a return rate of 30.9%, Cape Karoo at 30.2%, Overberg at 30.1%, and Garden Route & Klein Karoo at 30.0%.

These figures highlight the appeal and popularity of these destinations, showcasing their ability to attract and retain visitors.

Mobile Insights: International Visitor Trends

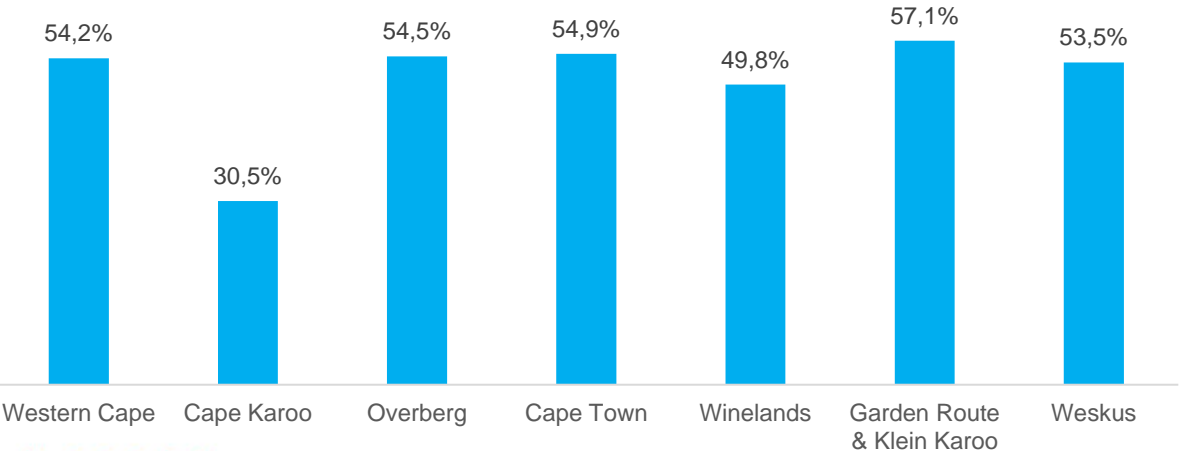
Average Length of Stay (LOS), Jan–Apr. 2024



International tourists who visit the Western Cape tend to spend the longest time in some of the most popular tourist destinations.

The top three destinations where the average tourist stay duration is maximum are the Overberg (2.7 days), Cape Town and Garden Route & Klein Karoo (2.6 days respectively).

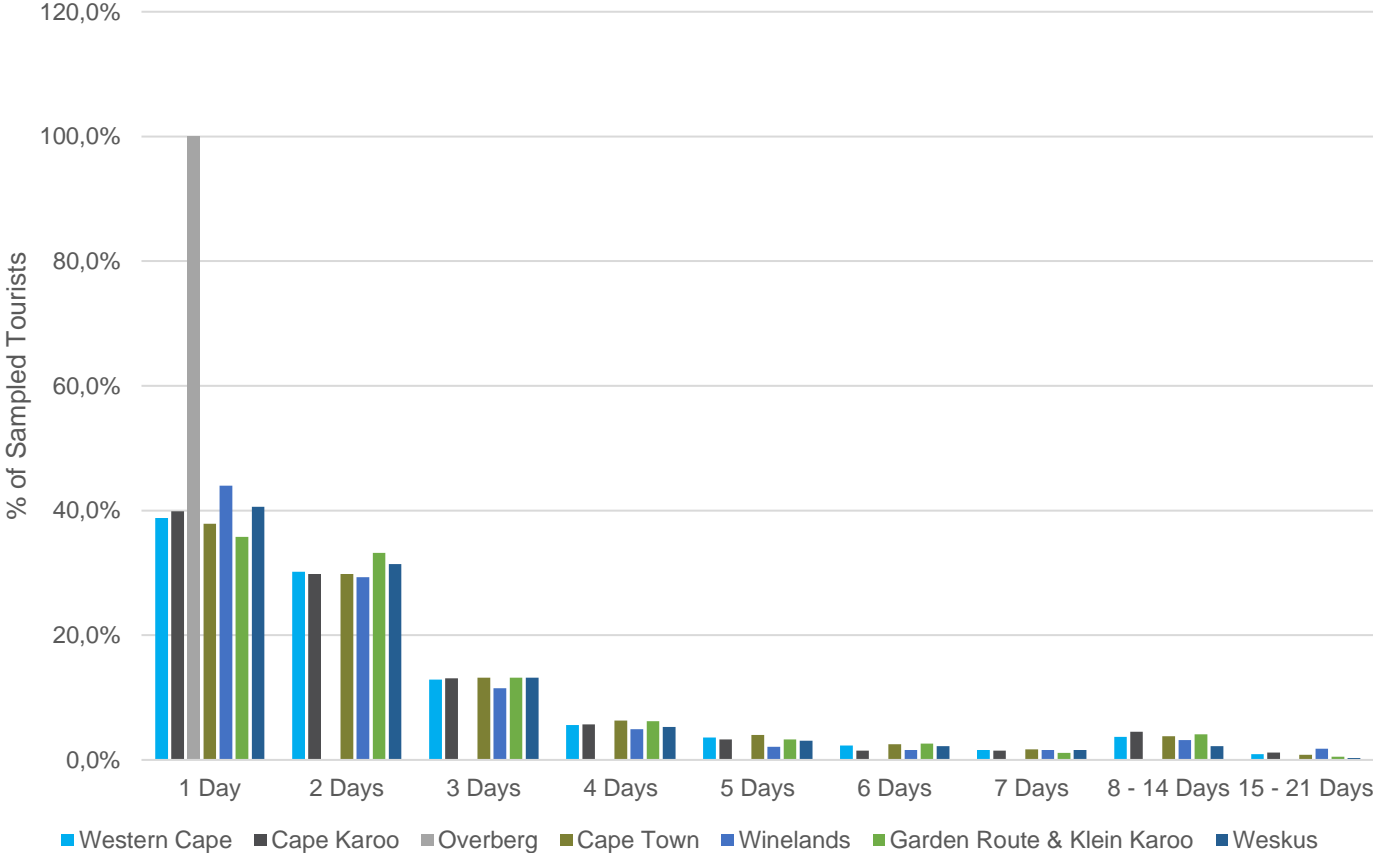
% Overnight Stays, Jan–Apr. 2024



Close to 60% of sampled tourists prefer to stay overnight in the Garden Route & Klein Karoo, close to 55% in Cape Town, and Overberg, and 53.4% choose Weskus as their preferred destination for an overnight stay.

Mobile Insights: International Visitor Trends

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

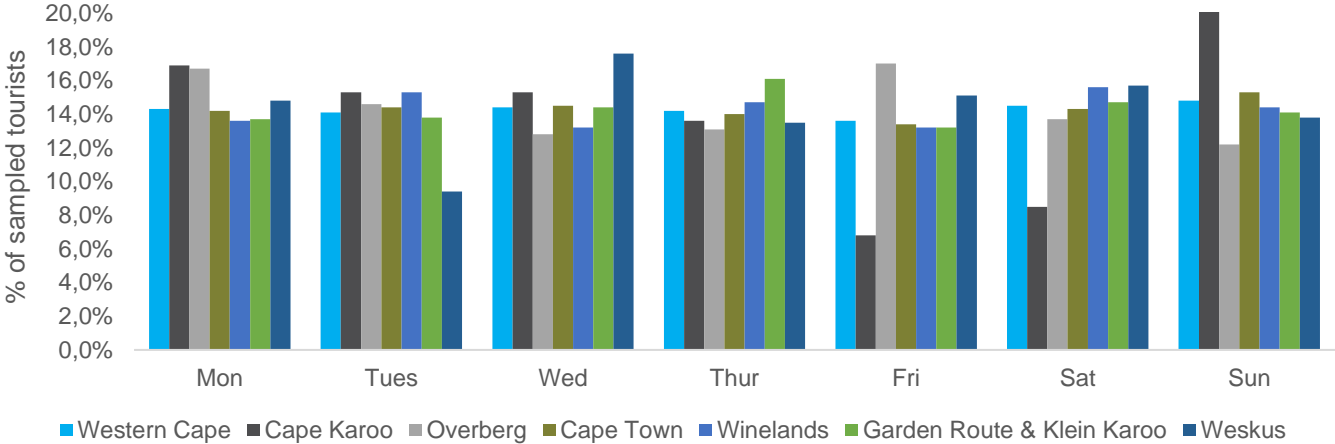


The mobile data insights show that **international tourists stayed between 1 and 3 days in the province and all regions** between January and April 2024

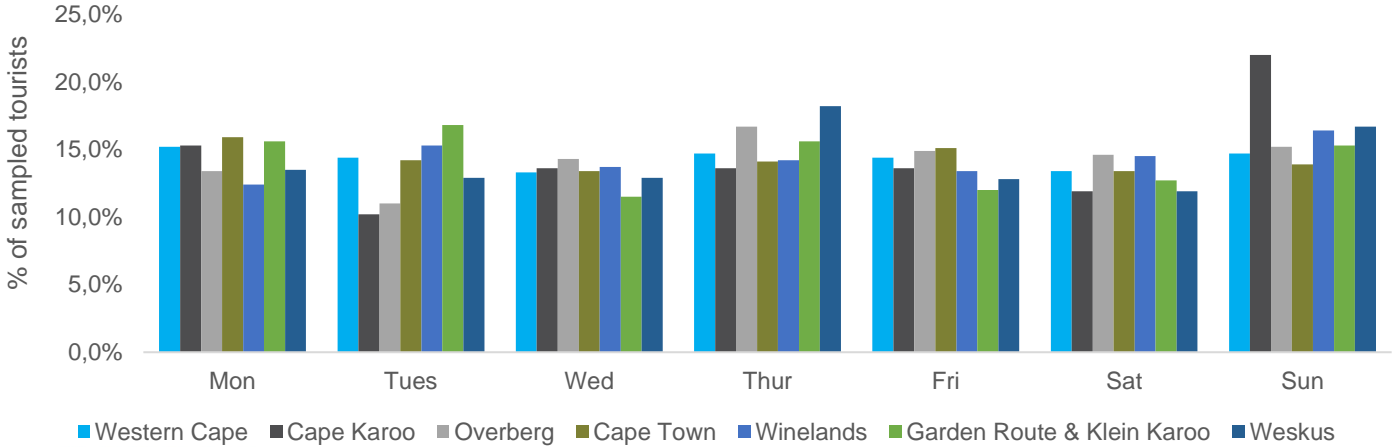
Source: Rove (2024)

Mobile Insights: International Visitor Trends

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



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



From January to April 2024, the analysis of mobile data showed a different pattern in the choice of arrival and departure days in the Western Cape.

Cape Karoo

Arrival – Sunday; Departure – Sunday

Overberg

Arrival – Friday; Departure – Thursday

Cape Town

Arrival – Sunday; Departure – Monday

Winelands

Arrival – Saturday; Departure – Monday

Garden Route & Klein Karoo

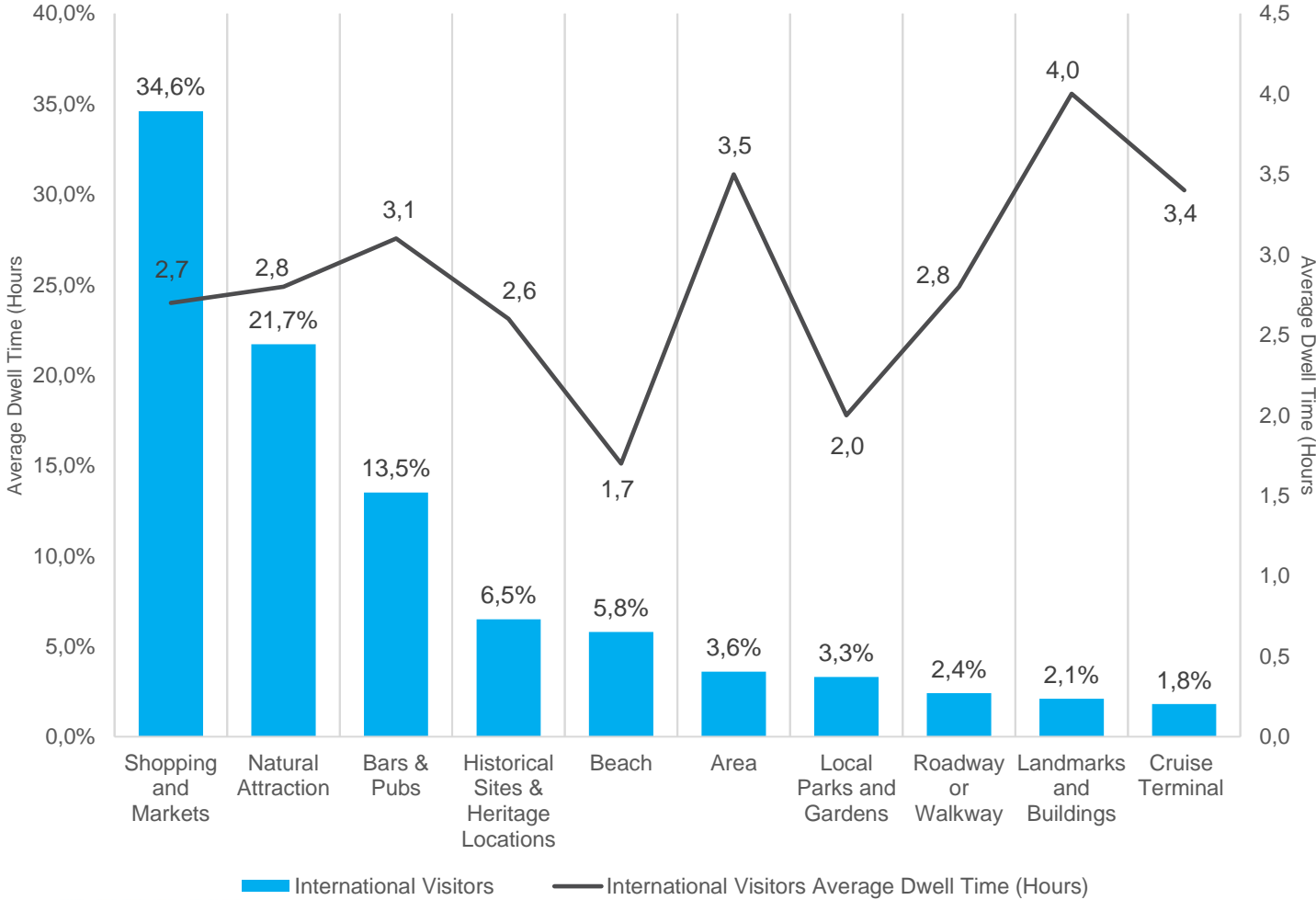
Arrival – Thursday; Departure – Tuesday

Weskus

Arrival – Saturday; Departure – Sunday

Mobile Insights: International Visitor Trends

Top POIs Visited by International Tourist, Jan–Apr. 2024



- Top 3 Points of Interest (POIs)
- 1. Shopping and markets** were the most popular types of attraction visited by **894 international tourists** with an average dwell time of **2.7 hours**.
 - 2. Natural attractions** ranked as the 2nd most popular point of interest among **559 international tourists** with an average dwell time of **2.8 hours**.
 - 3. Bars and pubs** were the 3rd most popular point of interest among **349 international tourists** with an average dwell time of **3.1 hours**.

Definitions of Mobile Location Data and Tourists vs non-Tourists

- About Mobile Location Data

- Privacy compliant data is collected from location-enabled apps on mobile devices. Data is collected when those location-enabled mobile devices enter our geo-fenced areas.
- Data is collected through applications (news, weather, games, texting apps, traffic, etc).
 - Year-over-year numbers could be skewed by increased app penetration and data privacy settings/policies.
 - The exception is China which does not share data...
- Think of mobile data like survey data on steroids.
 - A sample size greater than 30 yields a 95% level of confidence.
 - This may be the largest sample size of data pertaining to visitors•
- This should not be compared to visitation data. •
- Many factors impact total sample size:
 - Number of app partnerships
 - Usage of apps
 - App developer policies
 - Volume of visitors

- Who Are Tourists?

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

Source: Rove, 2024

Definitions of Mobile Location Data and Tourists vs non-Tourists

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

Glossary of Key Terms

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



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