



Tourism Research Overview May 2024

Cape Town & the Western Cape

WESGRO

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

An Inspiring Place To Do Business

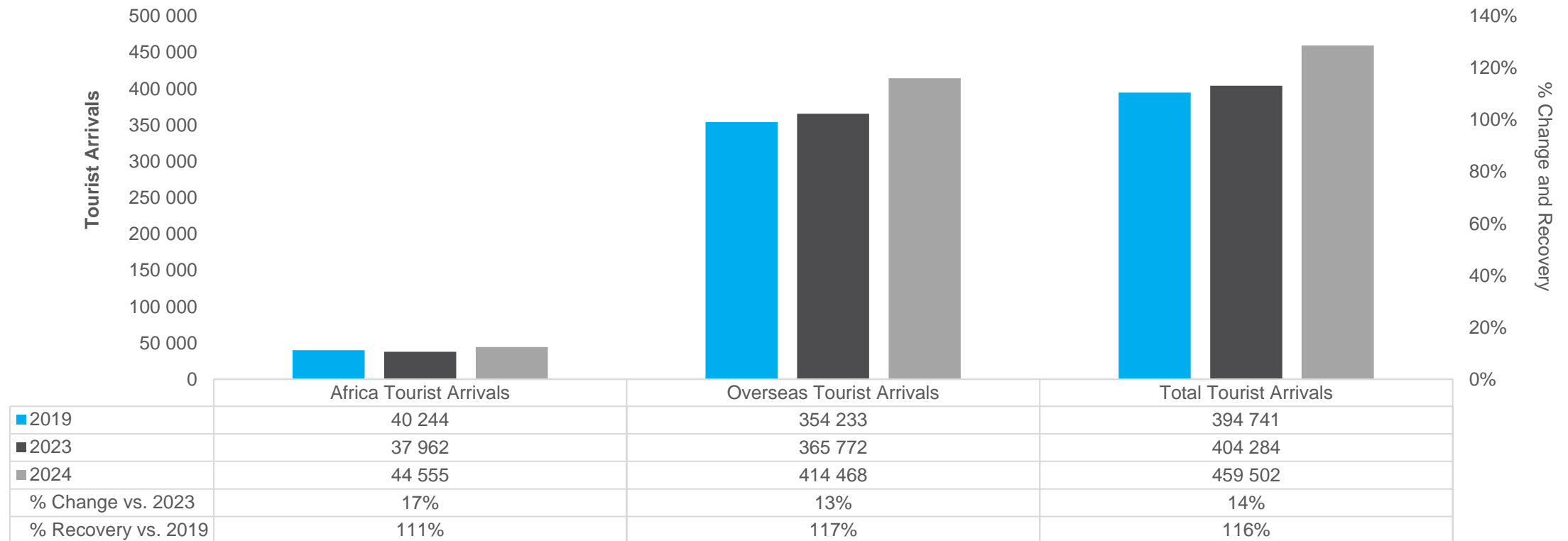
Key Findings

- Tourist arrivals to Cape Town (via air) recorded a 14% year-on-year increase over the period January to May 2024, reaching 459,502 tourists and surpassing the 2019 figure of 394,741 (Jan – May). Across the Jan – May 2024 period, 90% of air arrivals to Cape Town were from overseas markets and 10% from the rest of Africa. (Source: StatsSA)
- Between January and May 2024, UK led as the top overseas air market to Cape Town, followed by Germany, USA, Netherlands and France in the rest of the top 5 positions. The European region maintained a strong presence into the first five months, with 6 out of the top 10 source markets originating from the continent. (Source: StatsSA)
- Overseas air arrivals to Cape Town during the period Jan – May 2024 reflected full recovery from 8 out of the top 10 source markets to Cape Town vs. Jan – May 2019. These markets include the UK, Germany, USA, Netherlands, Canada, India, 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. (Source: StatsSA)
- Air arrivals to Cape Town from the rest of Africa during the period Jan – May 2024 reflected full recovery from 8 out of the top 10 source markets to Cape Town vs. Jan – May 2019. These markets included Zimbabwe, Kenya, Mozambique, Mauritius, Nigeria, Ghana, Botswana and Tanzania. (Source: StatsSA)
- CTIA's **international terminal** saw a 13% year-on-year growth over the period Jan – May 2024, with over 1.3 million two-way passengers moving through the terminal. The **domestic terminal** recorded an 8% year-on-year growth over the period Jan – May 2024, with over 2.9 million two-way passengers passing through the domestic terminal. George Airport recorded 327,758 two-way passengers between Jan and May 2024, and in relation to the same period in 2019, the year-to-date passenger movement between Jan and May 2024 recovered by 99%. (Source: ACSA)
- 51 participating attractions across the six regions of the Western Cape recorded a total of 3,730,909 visitors between January and May 2024, an 18% growth in the number of visitors compared to January–May 2023.
- The top 5 participating Western Cape attractions with the highest volume of visitors between January and May 2024 were recorded for: Table Mountain National Park (1,387,807 visitors) Table Mountain Aerial Cableway (503,234 visitors) Table Mountain National Park: Cape of Good Hope (441,219 visitors) Table Mountain National Park: Boulders (373,674 visitors) and Kirstenbosch National Botanical Garden (288,570 visitors).

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

- Tourist arrivals to Cape Town (via air) recorded a 14% year-on-year increase over the period January to May 2024, reaching 459,502 tourists and exceeding the 2019 figure of 394,741 (Jan – May). Across the Jan – May 2024 period, 90% of air arrivals to Cape Town were from overseas markets and 10% from the rest of Africa.

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

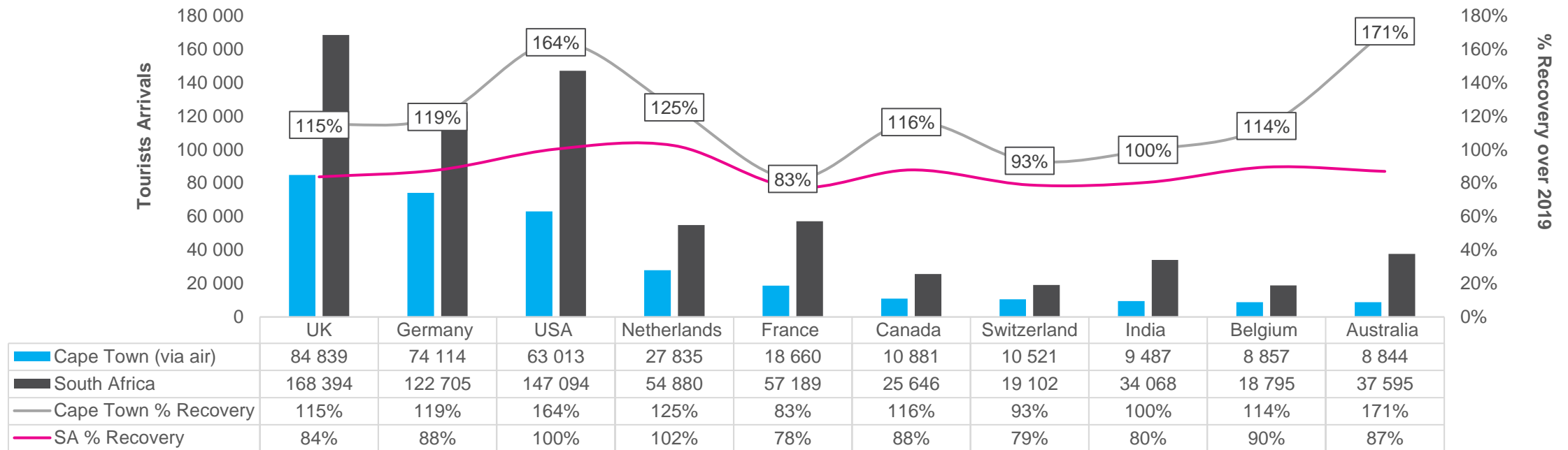


Source: StatsSA, 2024

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

- Between January and May 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 European region maintained a strong presence into the first five months, with 6 out of the top 10 source markets originating from the continent.
- Overseas air arrivals to Cape Town during the period Jan – May 2024 reflected full recovery from 8 out of the top 10 source markets to Cape Town vs. Jan – May 2019. These markets include the UK, Germany, USA, Netherlands, Canada, India, Belgium and Australia.

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



Source: StatsSA, 2024

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

- Between January and May 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 – May 2024 reflected full recovery from 8 out of the top 10 source markets to Cape Town vs. Jan – May 2019. These markets included Zimbabwe, Kenya, Mozambique, Mauritius, Nigeria, Ghana, Botswana and Tanzania.

Ranking	Africa Source Market	Tourists to Cape Town (via air) Jan - May 2024	Tourists to South Africa Jan - May 2024	Cape Town % Recovery vs. 2019	South Africa % Recovery vs. 2019
1	Namibia	7 689	64 016	69%	80%
2	Zimbabwe	6 569	980 814	146%	99%
3	Angola	5 508	15 999	51%	53%
4	Kenya	4 512	17 607	211%	146%
5	Mozambique	3 742	662 778	8505%	115%
6	Mauritius	2 356	7 484	105%	84%
7	Nigeria	1 807	9 304	139%	50%
8	Ghana	1 741	13 247	428%	171%
9	Botswana	1 557	149 475	225%	58%
10	Tanzania	1 525	14 475	177%	96%

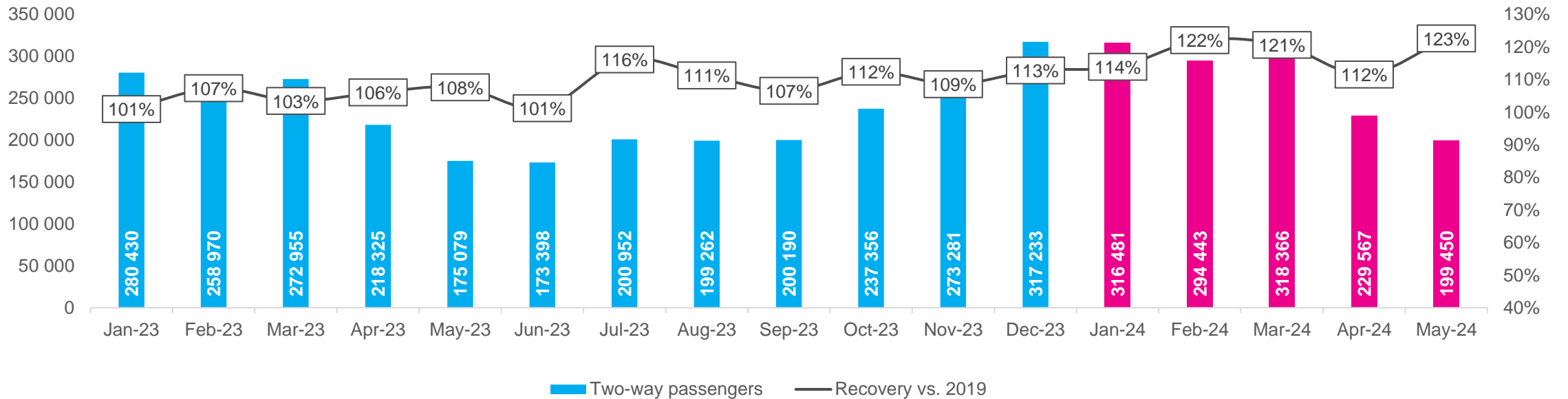
Cape Town International Airport (CTIA): International Terminal

Year/Month	2019	2020	2021	2022	2023	2023	2024					2024
						Dec	Jan	Feb	Mar	Apr	May	ytd
Two-way passengers	2 606 398	810 811	525 441	1 895 975	2 807 431	317 233	316 481	294 443	318 366	229 567	199 450	1 358 307
YoY growth percentage*	1%	-69%	-35%	261%	48%	17%	13%	14%	17%	5%	14%	13%

* 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 = 118%

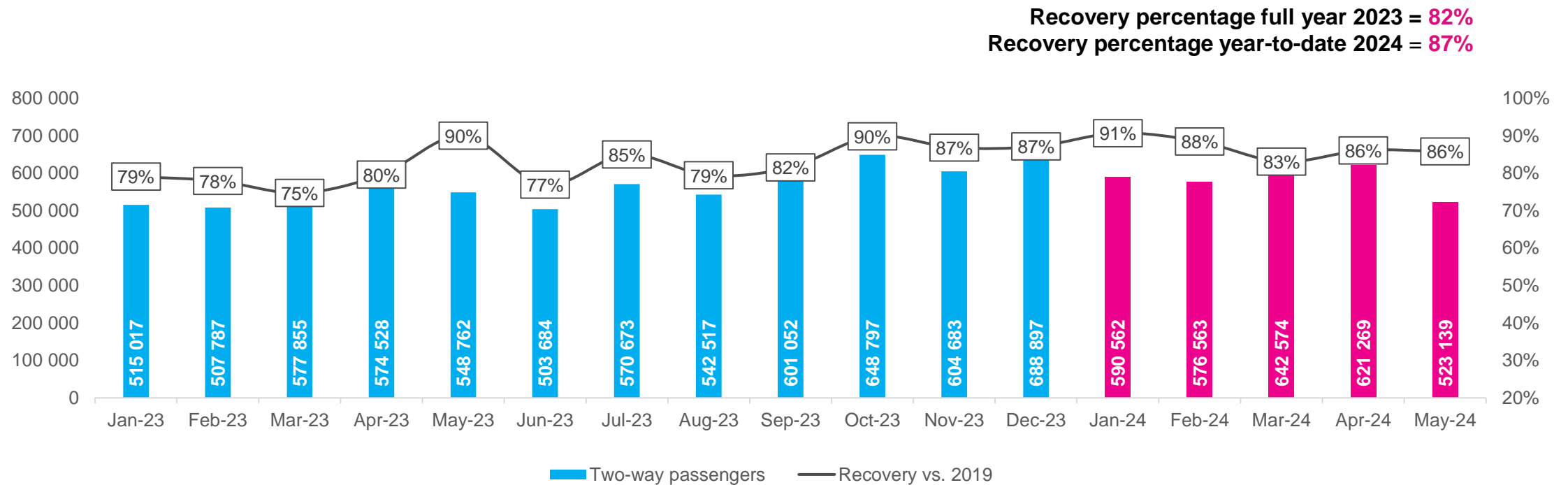


Cape Town International Airport (CTIA): Domestic Terminal

Year/Month	2019	2020	2021	2022	2023	2023	2024					2024 ytd
						Dec	Jan	Feb	Mar	Apr	May	
Two-way passengers	8 363 307	3 167 542	4 221 365	5 960 826	6 884 252	688 897	590 562	576 563	642 574	621 269	523 139	2 954 107
YoY growth percentage*	2%	-62%	33%	41%	16%	21%	15%	14%	11%	8%	-5%	8%

* Growth compared to the same period in the previous year

Passenger data source: ACSA



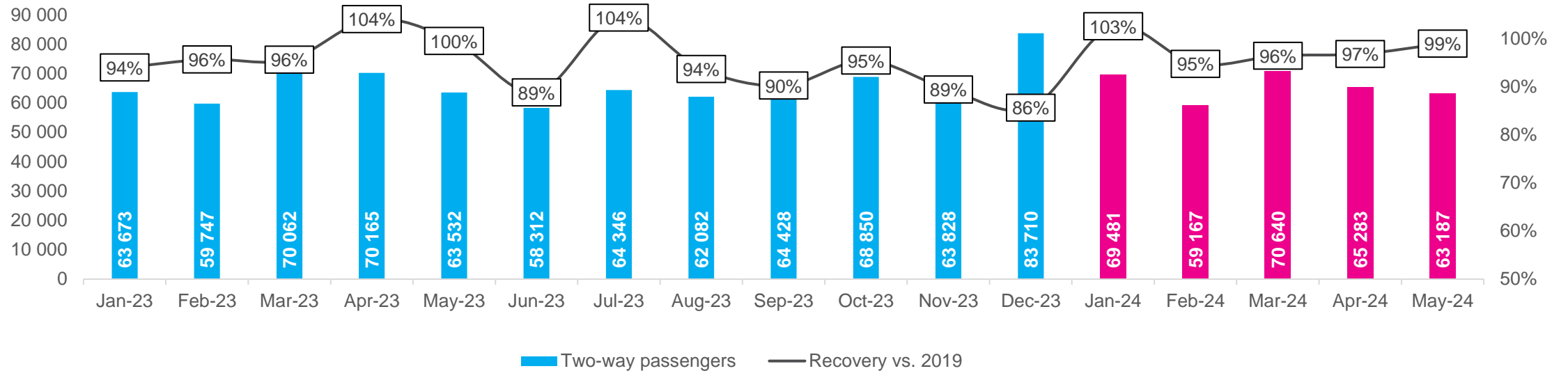
George Airport (GRJ): Passenger performance: Jan – May 2024

Year/Month	2019	2020	2021	2022	2023	2023	2024					2024 Ytd
						Dec	Jan	Feb	Mar	Apr	May	
Two-way passengers	840 804	346 223	539 637	747 848	792 735	83 710	69 481	59 167	70 640	65 283	63 187	327 758
YoY change percentage*	0.5%	-59%	56%	39%	6%	31%	9%	-1%	1%	-7%	-1%	0.2%

* 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)

21 airlines, 26 destinations & 170 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 Maputo (MPM) 4x week
	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) 3x week
	TAAG	Luanda (LAD) Daily




Europe

	British Airways	London Heathrow (LHR) Daily
	KLM	Amsterdam (AMS)- Daily
	Lufthansa	Frankfurt (FRA) 5x per week
	Turkish Airlines	Istanbul (IST) Daily

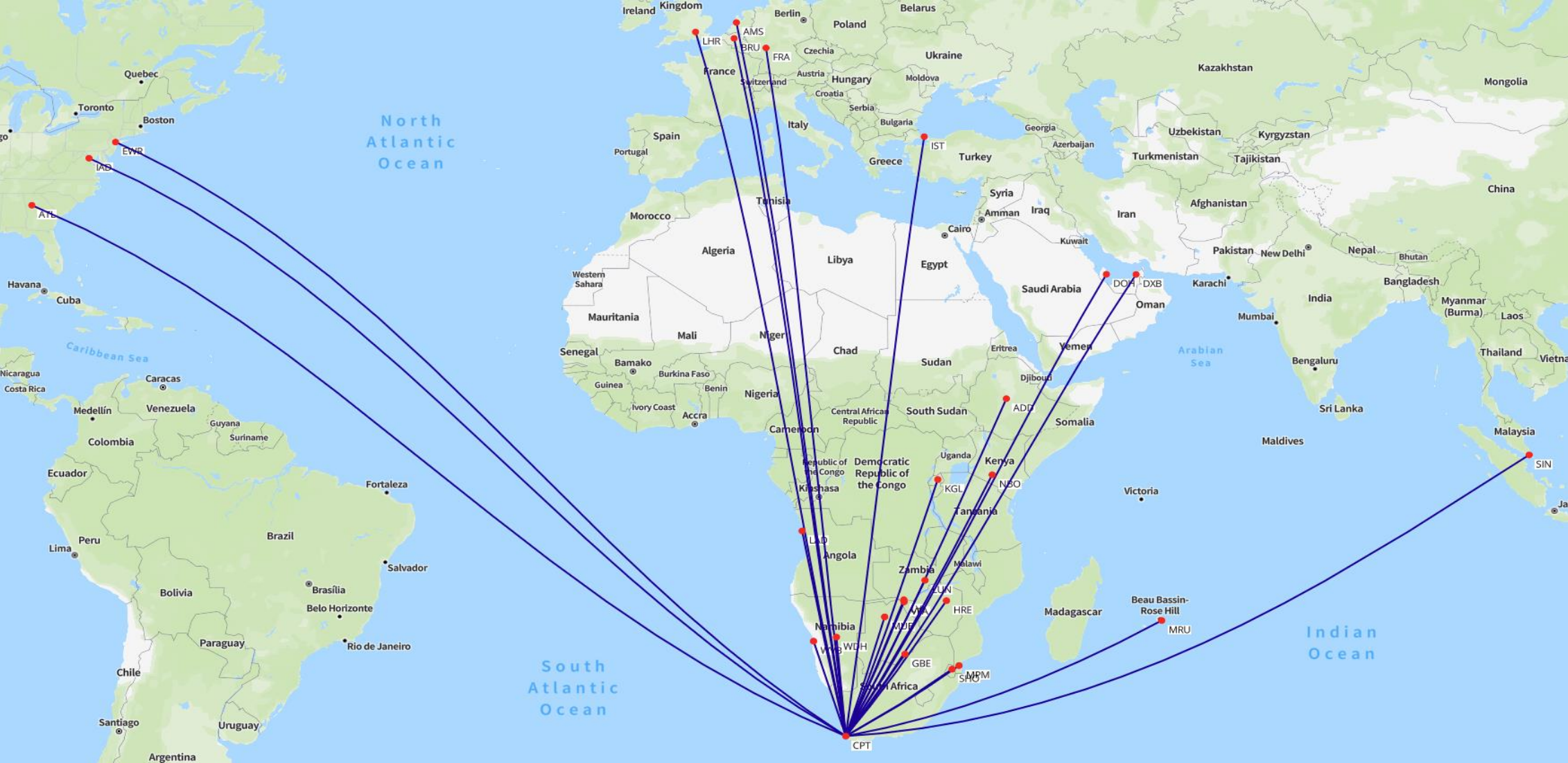
North & South America

	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

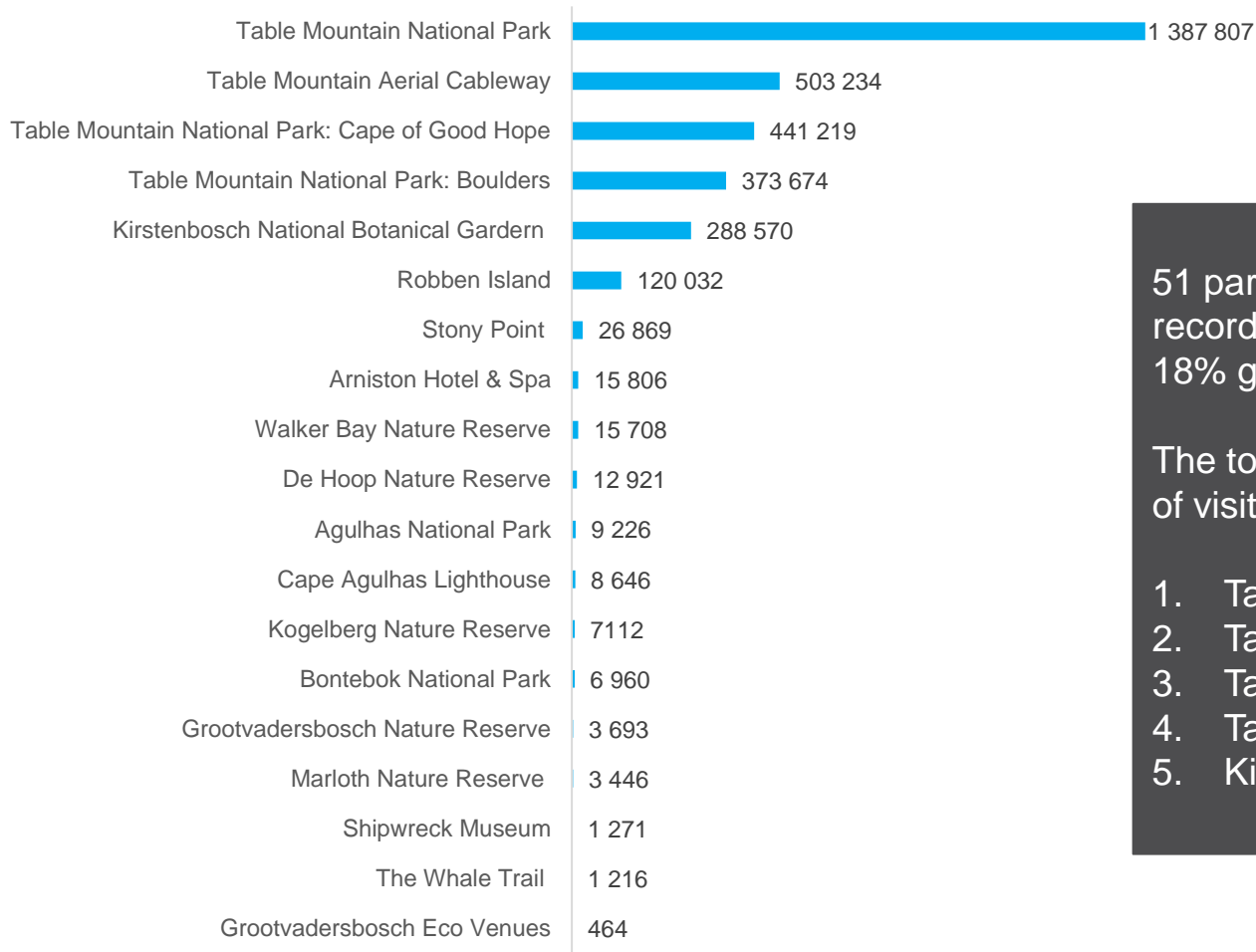
	Emirates	Dubai (DXB) 2x Daily
	Qatar Airways	Doha (DOH) Daily
	Singapore Airlines	Singapore (SIN)* Daily <i>*SIN-JNB-CPT-JNB-SIN</i>

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



Performance of Western Cape Attractions, Jan–May 2024

Top 20 Participating Western Cape Attractions (Jan–May 2024)



51 participating attractions across the six regions of the Western Cape recorded a total of 3,730,909 visitors between January and May 2024, an 18% growth in the number of visitors compared to January–May 2023.

The top 5 participating Western Cape attractions with the highest volume of visitors between January and May 2024 were recorded for:

1. Table Mountain National Park (1,387,807 visitors)
2. Table Mountain Aerial Cableway (503,234 visitors)
3. Table Mountain National Park: Cape of Good Hope (441,219 visitors)
4. Table Mountain National Park: Boulders (373,674 visitors)
5. Kirstenbosch National Botanical Garden (288,570 visitors)

Performance of Western Cape Attractions, Jan–May 2024

Continued...

Western Cape Attractions	Jan–May 2023	Jan–May 2024	Y-o-Y % Change
Cape Town			
Table Mountain National Park	1 161 712	1 387 807	19%
Table Mountain Aerial Cableway	434 951	503 234	16%
Table Mountain National Park: Cape of Good Hope	387 783	441 219	14%
Table Mountain National Park: Boulders	304 207	373 674	23%
Kirstenbosch	299 443	288 570	-4%
Robben Island	108 342	120 032	11%
Total	2 696 438	3 114 536	16%
Overberg			
Stony Point	11 154	26 869	141%
Arniston Hotel & Spa	14 735	15 806	7%
Walker Bay Nature Reserve	8 176	15 708	92%
De Hoop Nature Reserve	5 447	12 921	137%
Agulhas National Park	11 766	9 226	-22%
Cape Agulhas Lighthouse	9 962	8 646	-13%
Kogelberg Nature Reserve	3 166	7 112	125%
Bontebok National Park	6 827	6 960	2%
Grootvadersbosch Nature Reserve	3 499	3 693	6%
Marloth Nature Reserve	3 197	3 446	8%
Shipwreck Museum	1 086	1 271	17%
The Whale Trail	1 316	1 216	-8%
Grootvadersbosch Eco Venues	599	464	-23%
Stony Point Eco Venue	165	428	159%
Elim Heritage Centre	444	413	-7%
De Mond Nature Reserve	3 494	412	-88%
Total	85 033	114 591	35%
Garden Route & Klein Karoo			
Tsitsikamma National Park	111 972	132 087	18%
Keurbooms River Nature Reserve	36 949	74 057	100%
Robberg Nature Reserve	41 698	54 982	32%
Wilderness National Park	43 759	49 496	13%
Knysna National Park	14 776	17 414	18%
Goukamma Nature Reserve	952	995	5%
Outeniqua Nature Reserve	3	2	-33%
Total	250 109	329 033	32%

Weskus	Jan–May 2023	Jan–May 2024	Y-o-Y % Change
West Coast National Park	52 491	87 650	67%
Khwattu	9 000	9 634	7%
Cederberg-Algeria Nature Reserve	6 856	8 045	17%
Matjiesrivier Nature Reserve	5 232	6 196	18%
Bird Island Nature Reserve	4 112	4 942	20%
Groot Winterhoek Wilderness Area	1 791	2 023	13%
Cederberg-Kliphuis Nature Reserve	748	945	26%
Rocherpan Nature Reserve	750	760	1%
Total	80 980	120 195	48%
Cape Winelands			
Viljoensdrift River Cruise	7 326	9 627	31%
Limietberg Nature Reserve	11 207	9 410	-16%
Avalon Springs	3 603	6 223	73%
Jonkershoek Nature Reserve	3 725	4 995	34%
Birds Paradise	2 710	3 732	38%
Vrolijkheid Nature Reserve	2666	2 906	9%
Hottentots Holland Nature Reserve	1 661	2 031	22%
Protea Tractor Trip	1 755	1 504	-14%
Assegaaibosch Nature Reserve	665	1 380	108%
Vrolijkheid Eco Venue	288	356	24%
Total	35 606	42 164	18%
Cape Karoo			
Karoo National Park	11 331	8 925	-21%
Gamkaberg Nature Reserve	631	919	46%
Anysberg Nature Reserve	205	421	105%
Swartberg Nature Reserve	50	125	150%
Total	12 217	10 390	-15%
Total for all attractions (Jan–May 2023 & Jan–May 2024)	3 160 383	3 730 909	18%

Visitor Trends Mobile Location Data Insights

Jan – May 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

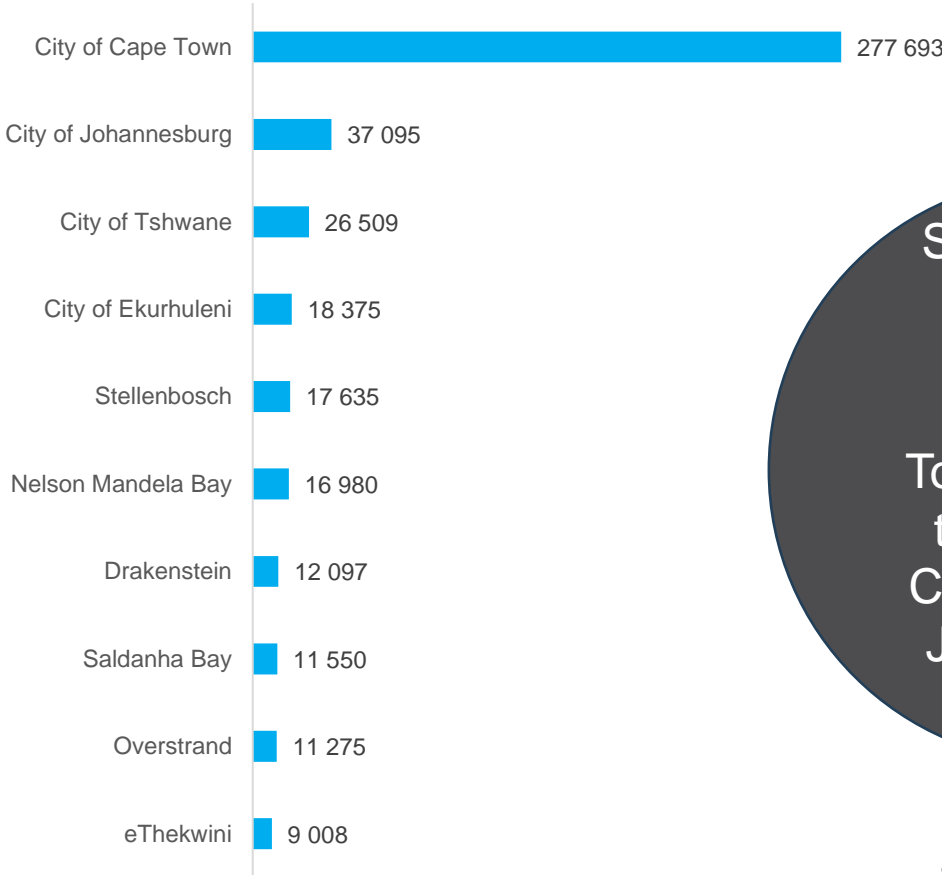
Mobile Use Variability

- 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–May 2024)



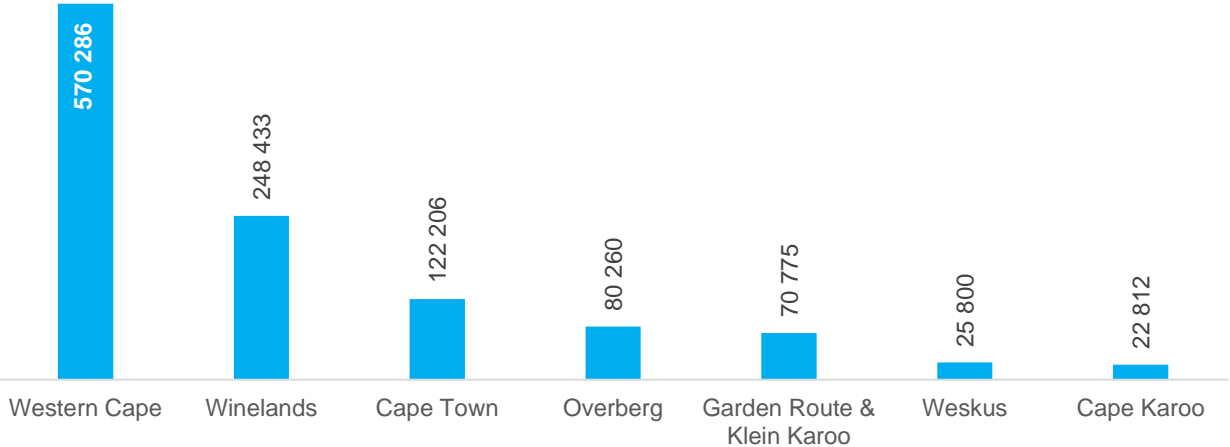
Sample Size:
570,286
Domestic
Tourists visited
the Western
Cape between
Jan and May
2024

Within the sample of 570,286 domestic tourists who visited the Western Cape between January and May 2024, 277,693 of the sampled tourists were from **Cape Town**, 37,095 were from **Johannesburg**, 26,509 were from **Tshwane**, 18,375 were from **Ekurhuleni** and 15,043 were from **Stellenbosch**.

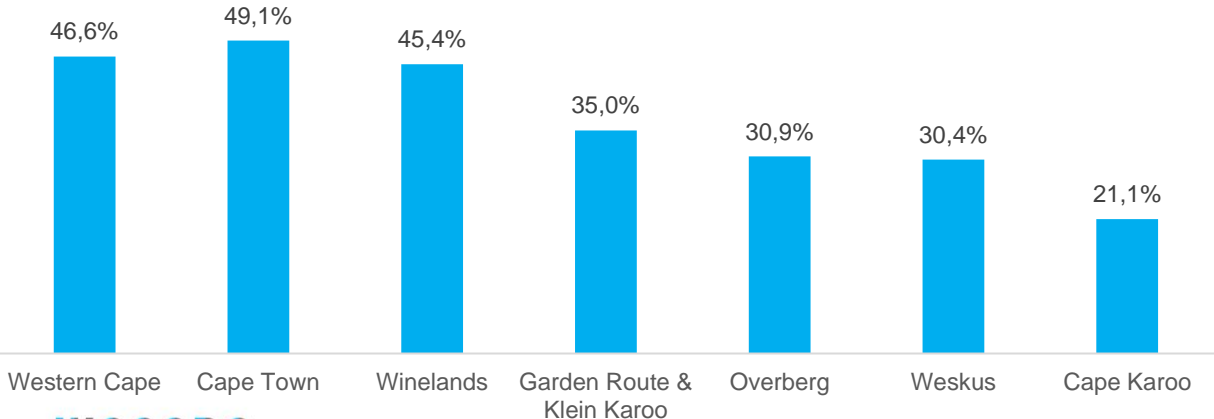
Source: Rove (2024)

Mobile Insights: Domestic Visitor Trends

Domestic Sample Size (Jan–May 2024)



Domestic Repeat Visitors (Jan–May 2024)



The Western Cape province experienced a significant increase in visitors, with 570,286 tourists. Out of this number, 46.6% of visitors returned for another visit.

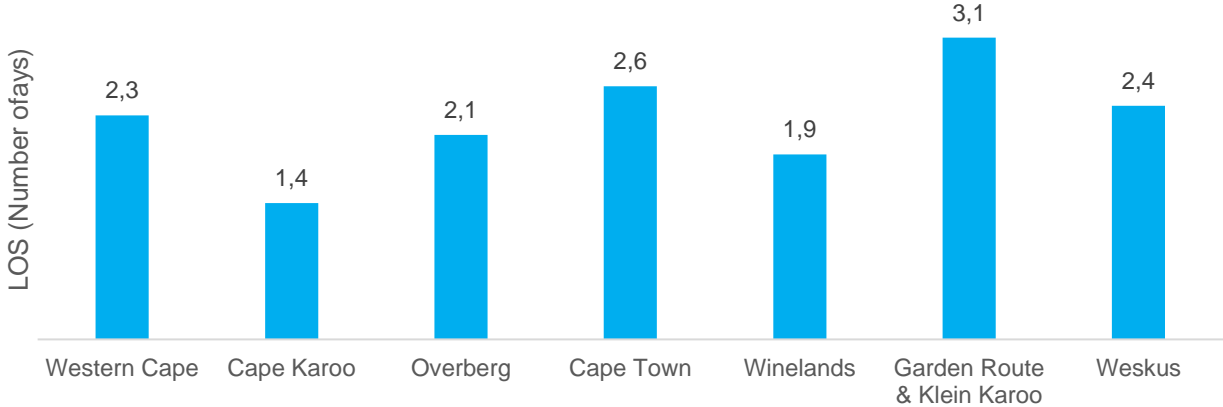
The most popular destinations within the province during this period were the Winelands (248,433 tourists) and Cape Town (122,206).

Cape Town and Winelands emerged as the most popular regions for domestic repeat visits, with 49.1% and 45.4% of tourists returning to these regions.

The Cape Karoo region welcomed 22,812 visitors in the period between January and May 2024, and 21.1% of the visitors returned for another visit.

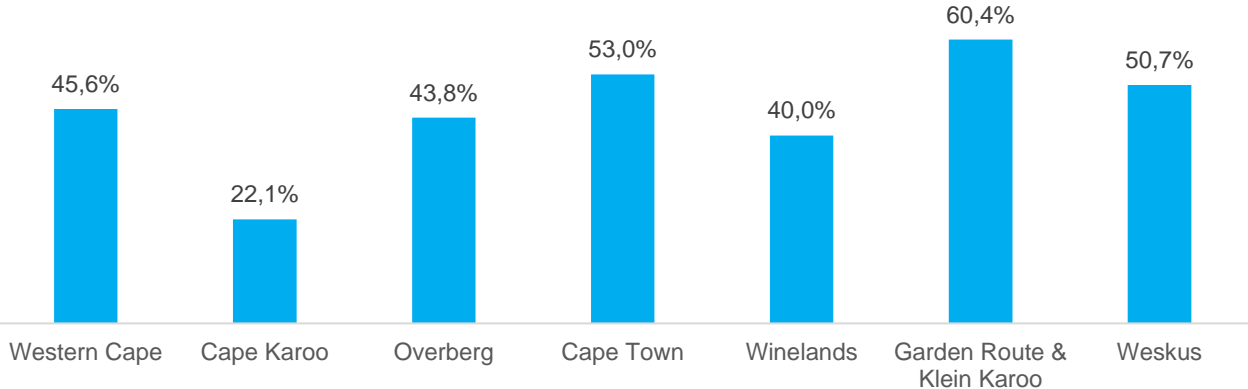
Mobile Insights: Domestic Visitor Trends

Average Length of Stay (LOS) (Jan–May 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 (2.6 days), and Weskus (2.4 days).

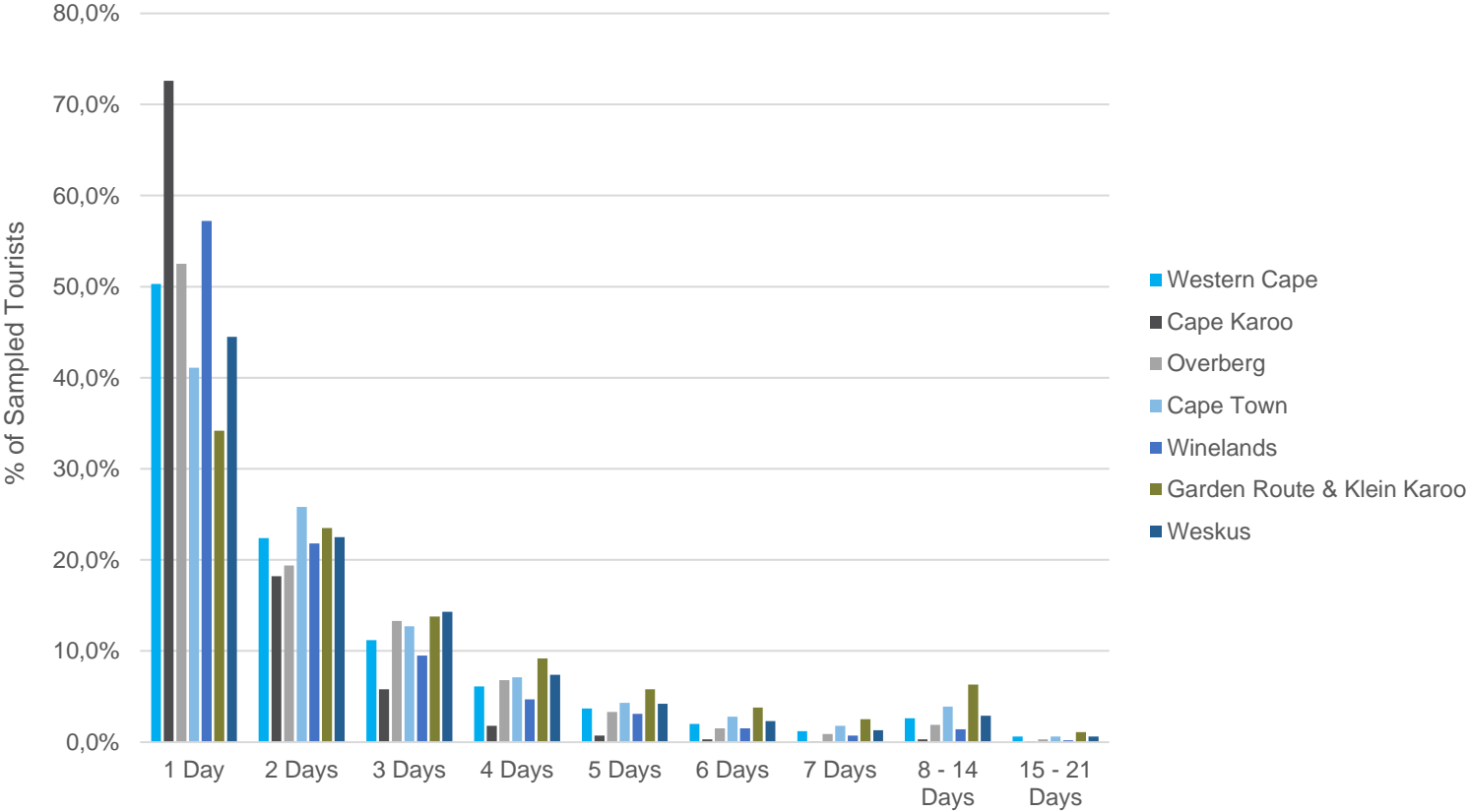
% Overnight Stays (Jan–May 2024)



- 60.4% of sampled tourists prefer to stay overnight in the Garden Route & Klein Karoo, 53.0% in Cape Town and 50.7% choose Weskus as their preferred destination for an overnight stay.

Mobile Insights: Domestic Visitor Trends

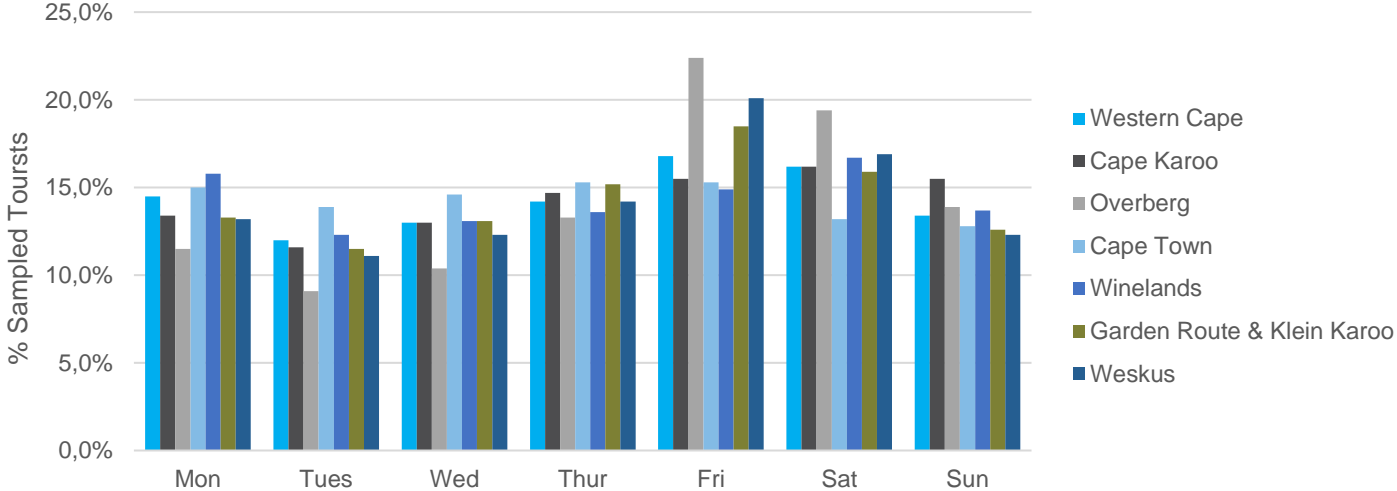
Average Length of Stay (Number of Days): Domestic (Jan–May 2024)



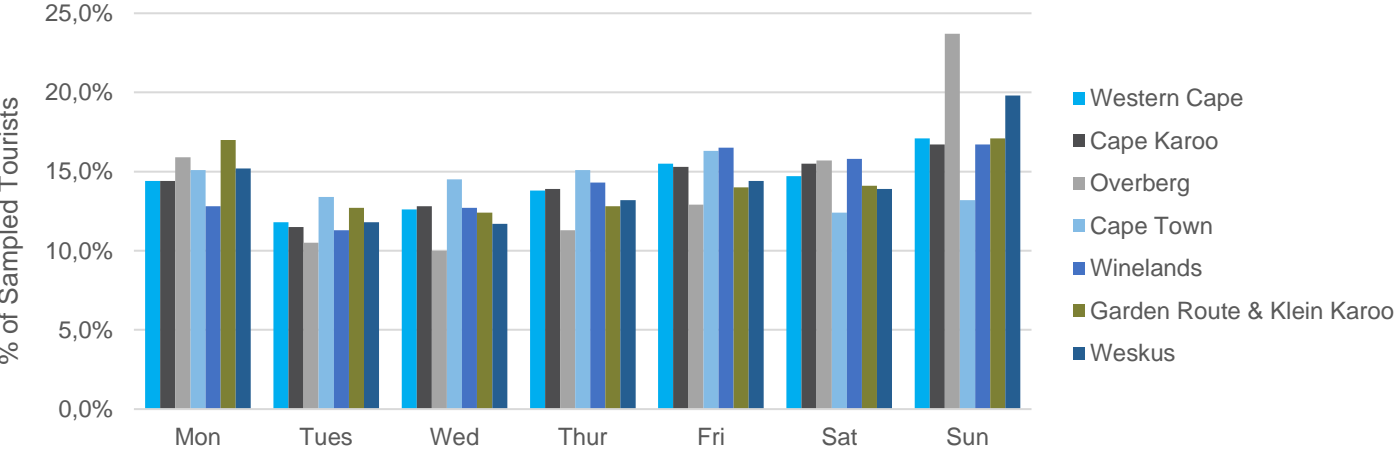
The mobile data insights show that domestic tourists stayed between 1 and 2 days in the province and all regions between January and May 2024.

Mobile Insights: Domestic Visitor Trends

Popular Arrival Days of the Week: Domestic (Jan–May 2024)



Popular Departure Days of the Week: Domestic (Jan–May 2024)

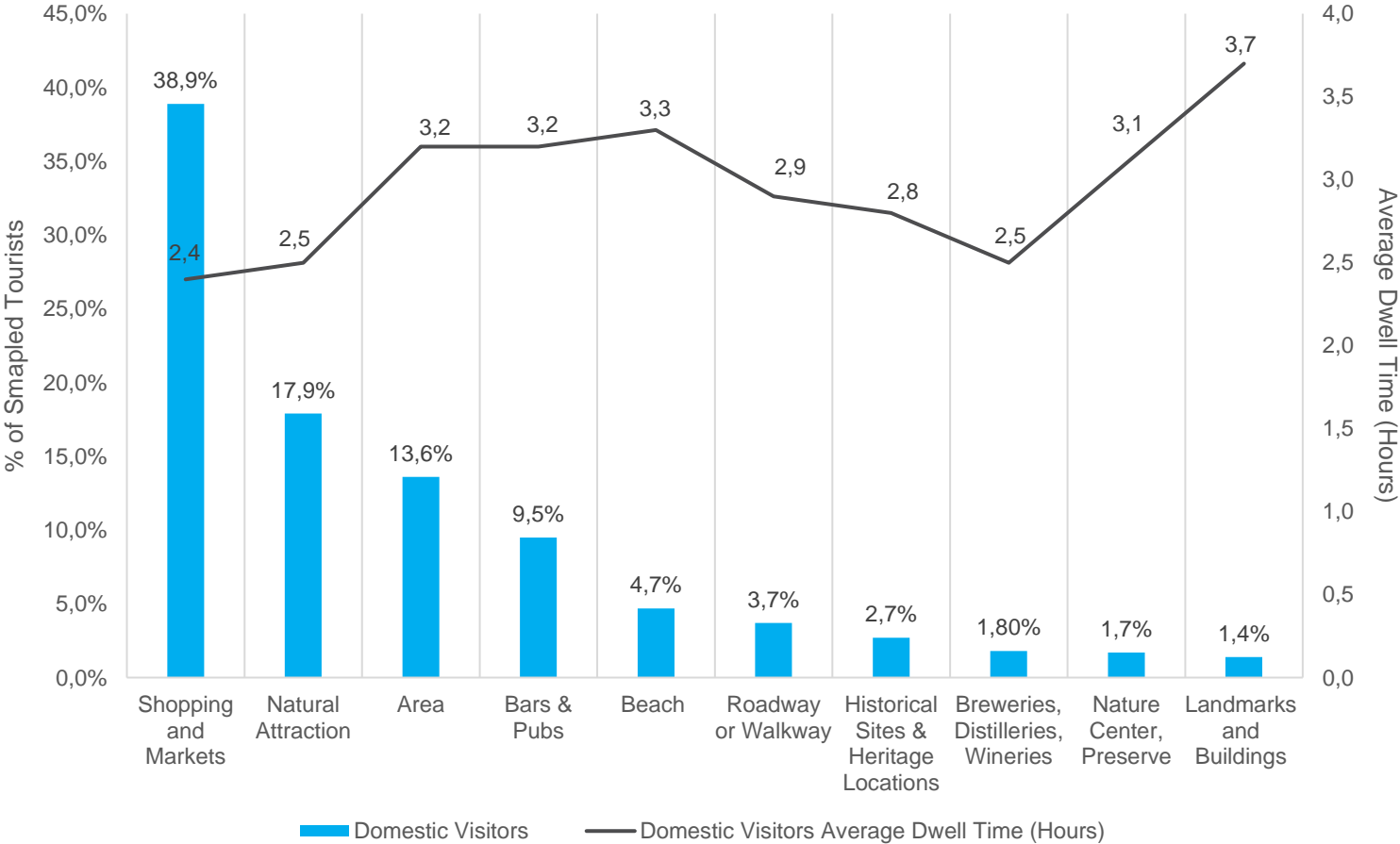


From January to May 2024, mobile data analysis revealed consistent arrival and departure day patterns in the Western Cape.

- 1. Cape Karoo**
Arrival – Saturday; Departure – Sunday
- 2. Overberg**
Arrival – Friday; Departure – Sunday
- 3. Cape Town**
Arrival – Thursday/Friday; Departure – Friday
- 4. Winelands**
Arrival – Saturday; Departure – Sunday
- 4. Garden Route & Klein Karoo**
Arrival – Saturday; Departure – Sunday
- 5. Weskus**
Arrival – Friday; Departure – Sunday

Mobile Insights: Domestic Visitor Trends

Top POIs Visited (Sub-Sector) by Domestic Tourists (Jan–May 2024)

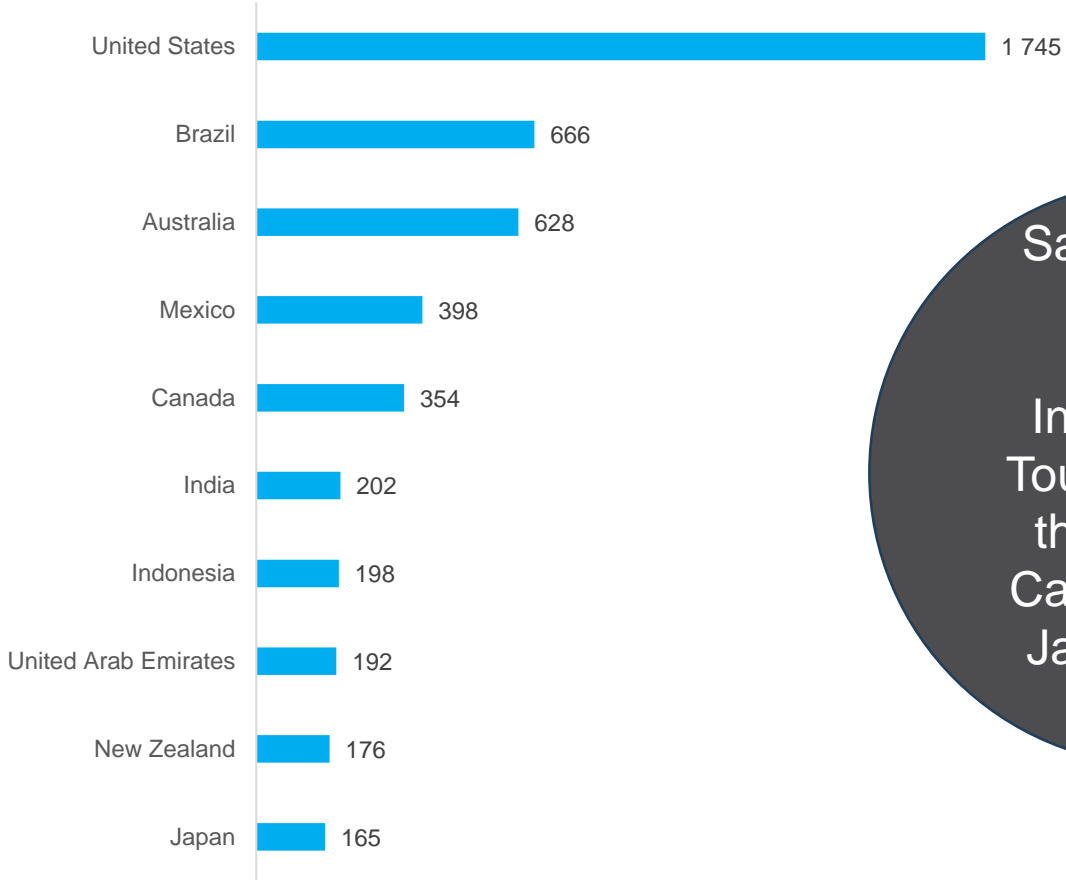


Top 3 Points of Interest (POIs)

1. Shopping and markets were the most popular types of attraction visited by 23,123 domestic tourists with an average dwell time of 2.4 hours.
2. Natural attractions ranked as the 2nd most popular point of interest among 11,578 domestic tourists with an average dwell time of 2.5 hours.
3. 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 8,849 domestic tourists, with an average dwell time of 3.2 hours.

Mobile Insights: International Visitor Trends

International Origin Country (Jan–May 2024)

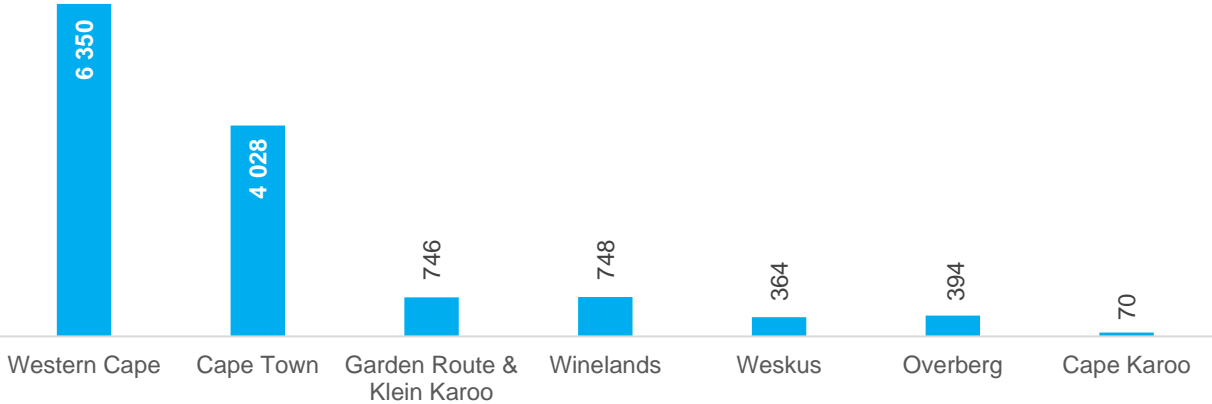


Sample Size:
6,350
International
Tourists visited
the Western
Cape between
Jan and May
2024

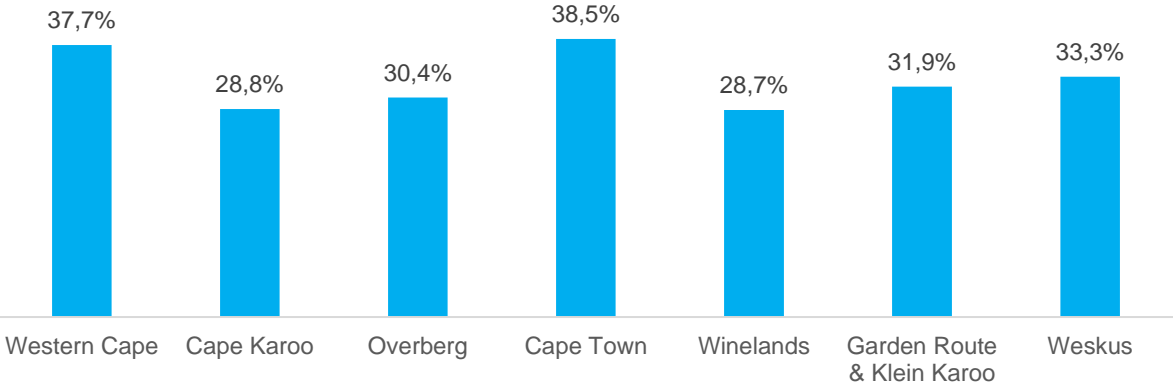
Within the sample of 6,350 international tourists who visited the Western Cape between January and May 2024, 1,745 of the sampled tourists were from the **US**, 666 were from **Brazil**, 628 were from **Australia**, 398 were from **Mexico**, 354 were from **Canada**, and 202 were from **India**.

Mobile Insights: International Visitor Trends

International Sample Size (Jan–May 2024)



International Tourists Repeat Visits (Jan–May 2024)



The Western Cape province experienced a significant increase in visitors, with 6,350 International tourists. Out of this number, 37.7% of visitors returned for another visit.

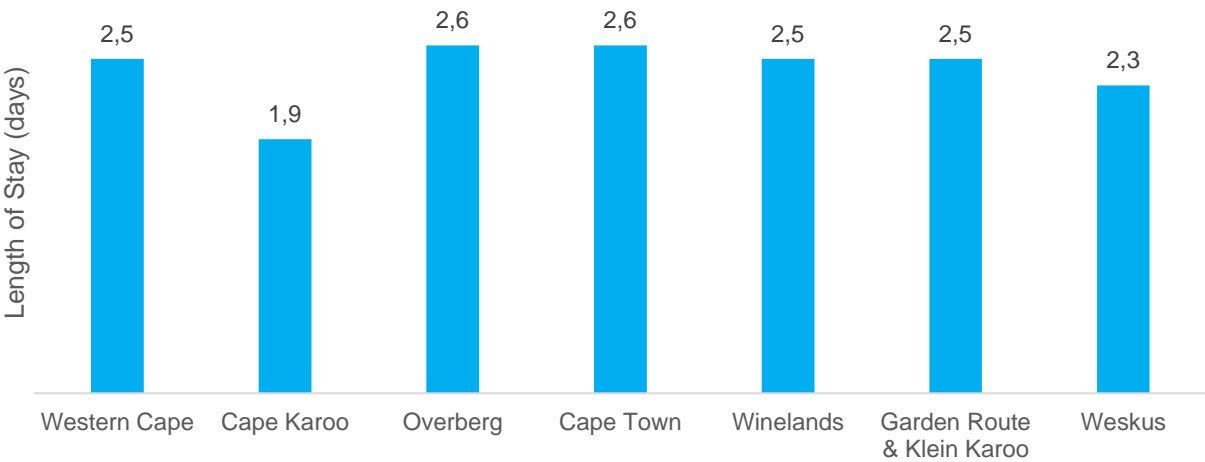
The most popular destination within the province during this period was Cape Town (4,028 tourist arrivals).

Between January and May 2024, Cape Town saw an impressive return rate of 38.5%, indicating visitor satisfaction and repeat visits. Following closely behind were Weskus with a return rate of 33.3%, Garden Route & Klein Karoo at 31.9% and Overberg at 30.4%.

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

Mobile Insights: International Visitor Trends

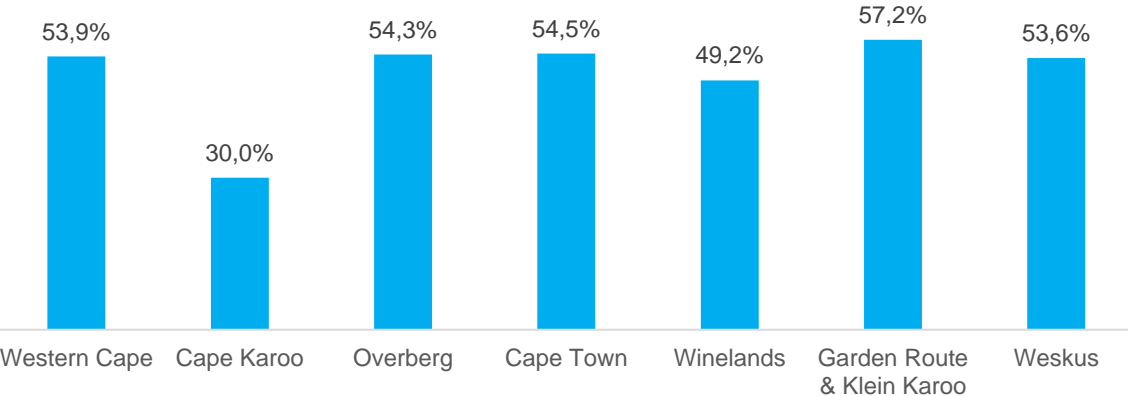
Average Length of Stay (LOS) (Jan–May 2024)



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

The top four destinations where the average tourist stay duration is maximum are the Overberg, Cape Town (2.6 days respectively), Winelands and Garden Route & Klein Karoo (2.5 days respectively).

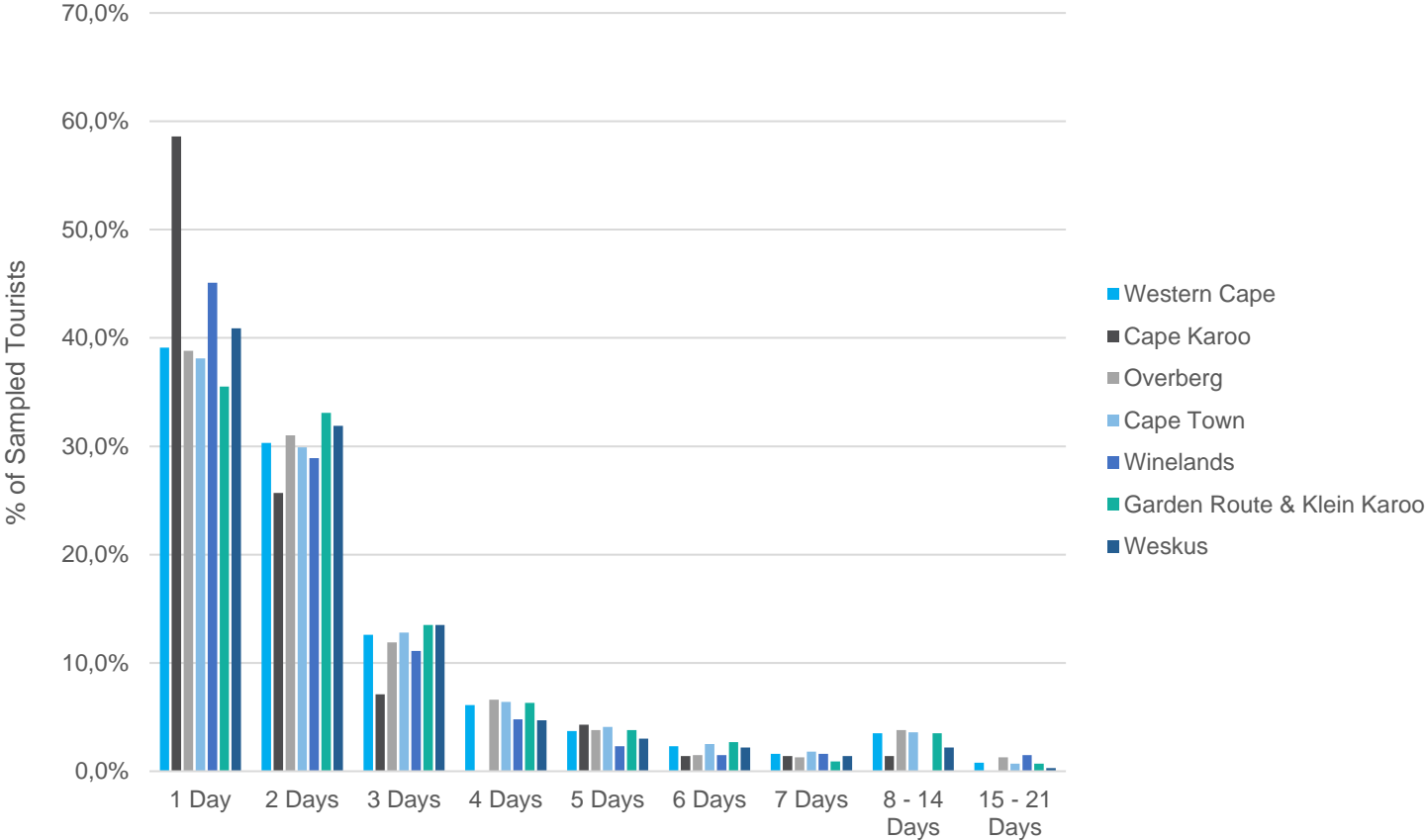
% Overnight Stays (Jan–May 2024)



57.2% 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

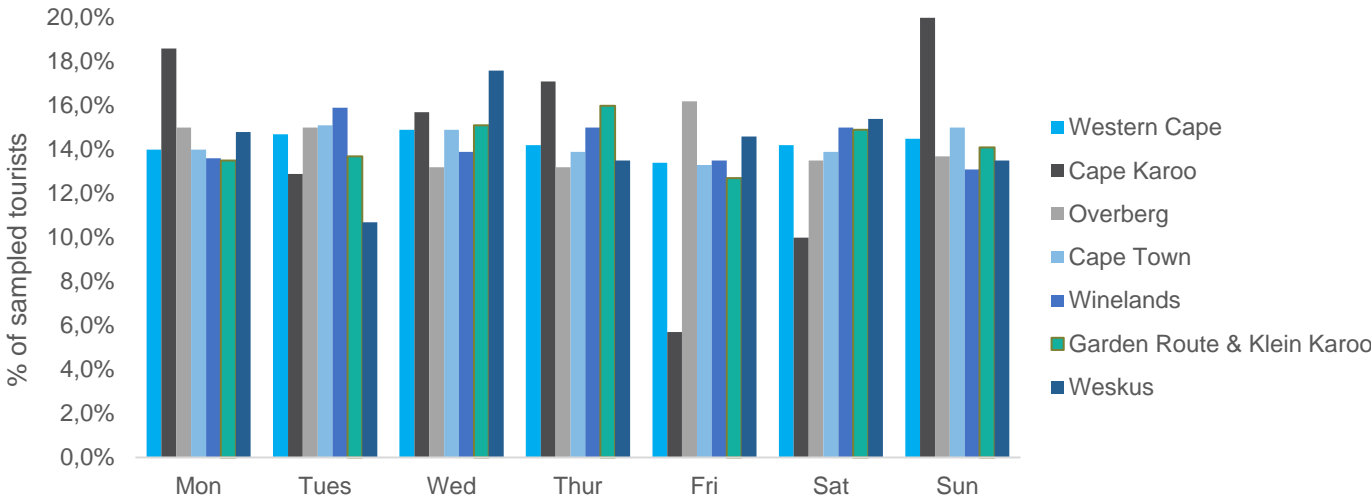
Average Length of Stay (Number of Days): International (Jan–May 2024)



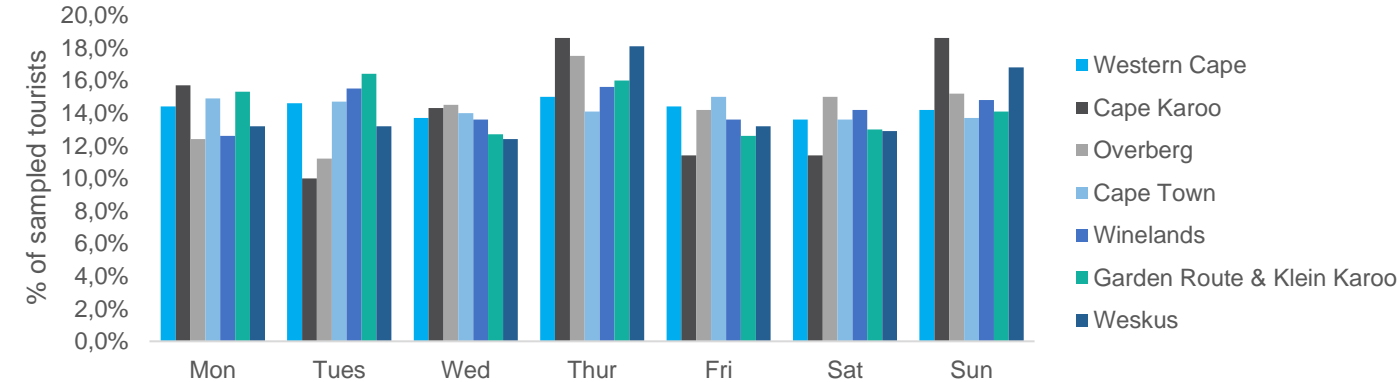
The mobile data insights show that international tourists stayed between 1 and 3 days in the province and all regions between January and May 2024.

Mobile Insights: International Visitor Trends

Popular Arrival Days of the Week: International (Jan–May 2024)



Popular Departure Days of the Week: International (Jan–May 2024)

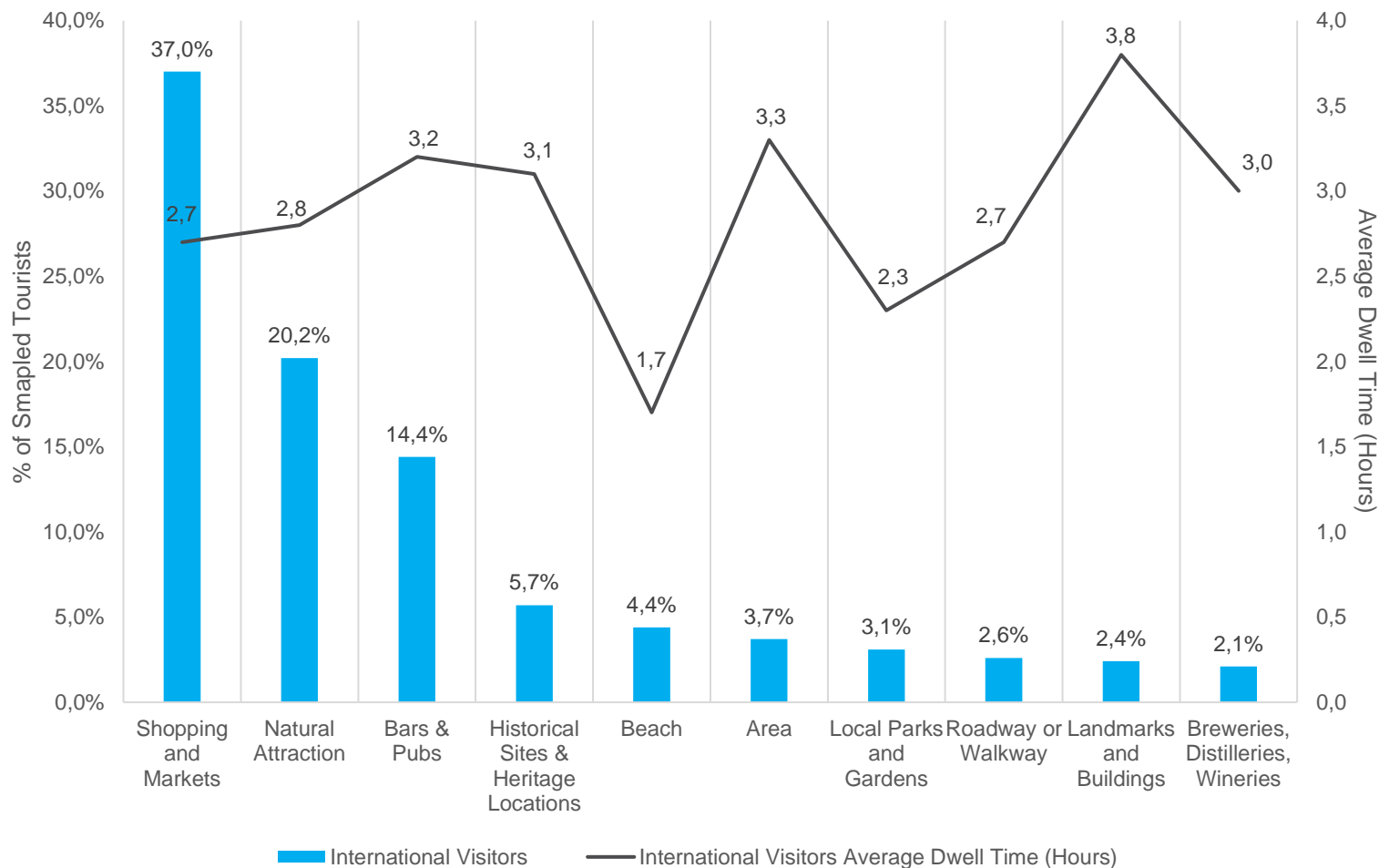


From January to May 2024, the analysis of mobile data showed a different pattern in the choice of arrival and departure days in the Western Cape.

- 1. Cape Karoo**
Arrival – Wednesday; Departure – Thursday
- 2. Overberg**
Arrival – Monday/Tuesday; Departure – Thursday
- 3. Cape Town**
Arrival – Sunday; Departure – Friday
- 4. Winelands**
Arrival – Tuesday; Departure – Tuesday
- 5. Garden Route & Klein Karoo**
Arrival – Thursday; Departure – Tuesday
- 6. Weskus**
Arrival – Saturday; Departure – Thursday

Mobile Insights: International Visitor Trends

Top POIs (Sub-Sector) Visited by International Tourist, Jan–May 2024



Top 3 Points of Interest (POIs)

1. Shopping and markets were the most popular types of attraction visited by 1,071 international tourists with an average dwell time of 2.7 hours.
2. Natural attractions ranked as the 2nd most popular point of interest among 623 international tourists with an average dwell time of 2.8 hours.
3. Bars and pubs were the 3rd most popular point of interest among 432 international tourists with an average dwell time of 3.2 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.)

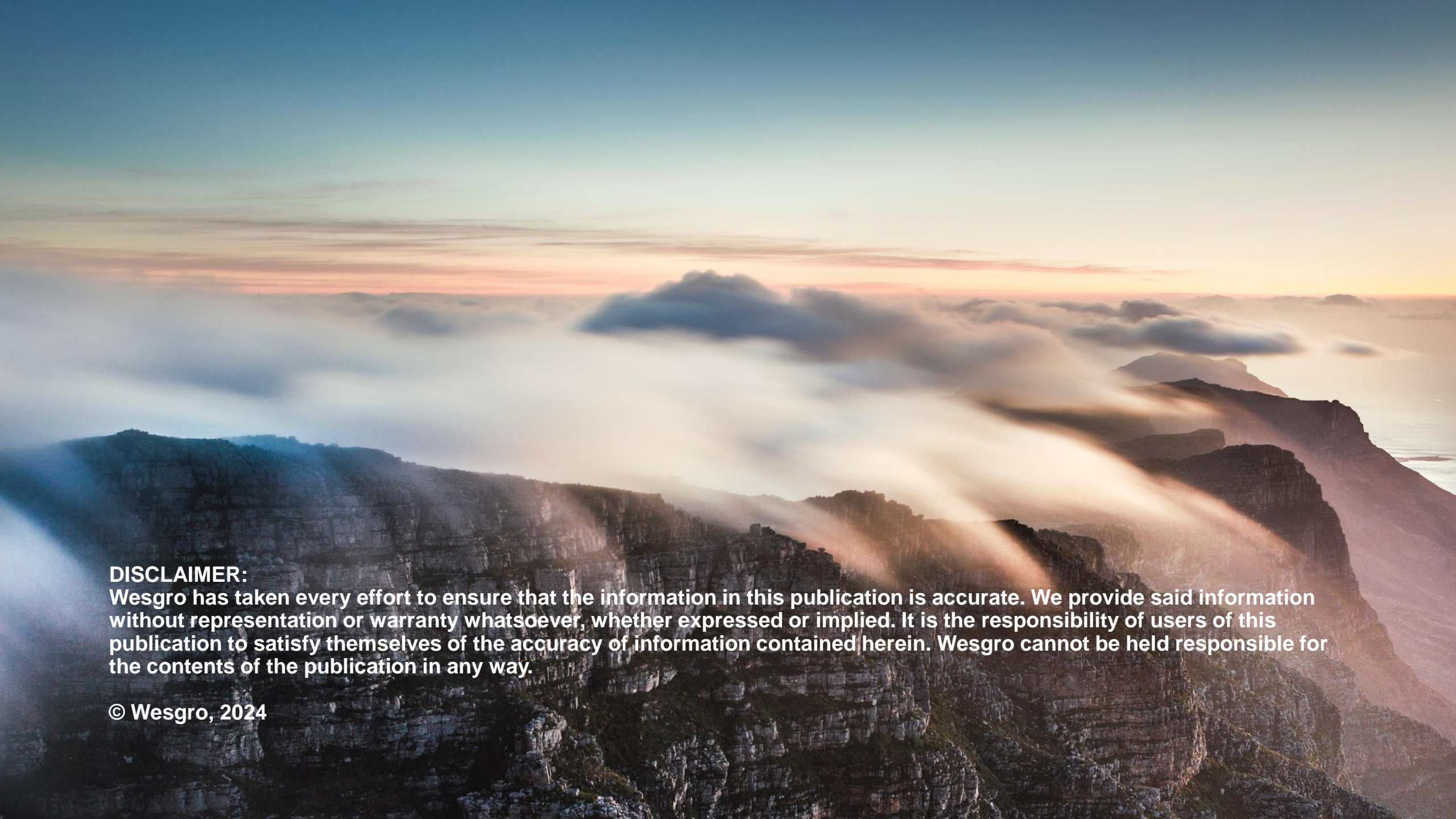
Source: Rove, 2024

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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