Tourism Research Overview March 2022 (incl. Easter Weekend)

Cape Town & the Western Cape

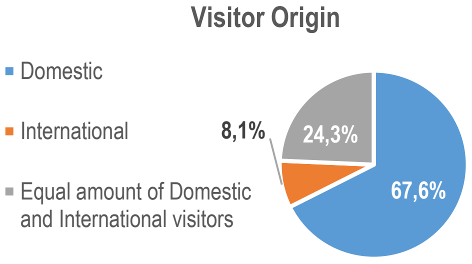
WESGRO
cape town & western cape
tourism, trade, investment, film

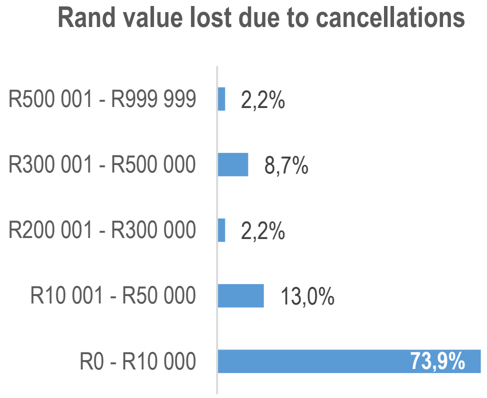
Key Findings

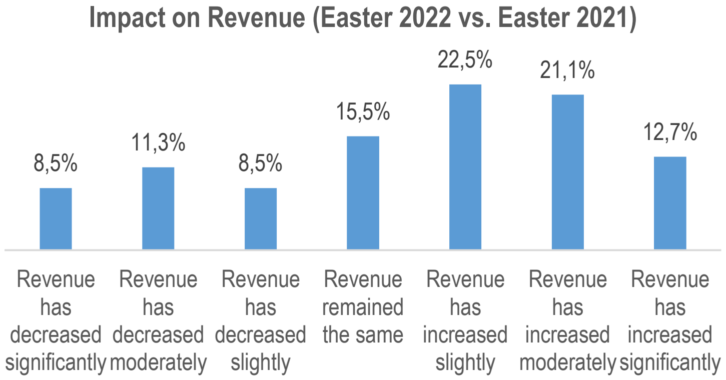
- Passengers through CTIA's international terminal grew by 28% from Feb 2022 and domestic terminal passengers reached a 72% recovery rate when compared to the same month in 2019. Domestic terminal passengers at George Airport recovered to 97% of pre-pandemic levels. Hotel occupancy grew from 30,8% in March 2021 to 64,4% in the same month this year, representing a recovery rate of 89% when compared to March 2019. Visitors to 26 participating attractions across the province grew by 118% when compared to the same month last year and recovered to more than half of what it was in March 2019.
- Based on mobile location data insights from 64 885 domestic and 1 244 international tourists, the Cape Winelands was the most popular region for domestic visitors in March and international tourists were found mostly in Cape Town. Domestic tourists stayed for an average 2,4 days in the province and international tourists spent on average 3,3 days. Garden Route & Klein Karoo was a popular region for domestic overnight stays and Cape Winelands saw the most repeat visitors.
- The biggest volume of online conversations about the Western Cape was around outdoor activities. Highest sentiment was driven by Destination Services, which includes conversations accommodation, tours, conference and conventions, and weddings. Food and Culinary, and Relaxation and Wellness, also showed high sentiment. Weddings and Spa and Wellness, though smaller in volume, had particularly high sentiment. Safety drove the lowest sentiment.
- Based on feedback obtained from 74 tourism businesses across the Western Cape, visitor trends indicate towards a better Easter season than the previous year. Towns were bustling with a lot events and activities, and many local tourists. However, many reported that guests stayed for shorter periods and had less money to spend.
- Visitors recorded over the 2022 Easter Weekend mainly originated from the local and domestic markets. Two thirds of respondents said that the majority of their visitors were domestic and 8% said that they had mostly international visitors, while a further 24% said that they had an equal amount of domestic and international visitors. This is in line with passenger movement through Cape Town International Airport, which saw 77% domestic and 23% international passengers over the first 3 weeks of April 2022.

Easter Weekend Performance Survey

- Feedback obtained from 74 tourism businesses across the Western Cape revealed that visitors recorded over the 2022 Easter Weekend mainly originated from the local and domestic markets. Two thirds of respondents said that the majority of their visitors were domestic and 8% said that they had mostly international visitors, while a further 24% said that they had an equal amount of domestic and international visitors. This correlates with passenger movement through Cape Town International Airport, which saw 77% domestic and 23% international passengers over the first 3 weeks of April 2022.
- Based on feedback from respondents, visitor trends indicate towards a better Easter season than the previous year. Towns were bustling with a lot events and activities, and many local tourists. However, many reported that guests stayed for shorter periods and had less money to spend. .
- For businesses that had cancellations, nearly three quarters of them said that they lost less than R10 000 in monetary terms and a further 13% lost between R10 000 and R50 000. More than half of respondents said that their revenue has increased compared to the same period in 2021, and a further 15,5% said that their revenue has remained the same.
- The biggest concern among respondents is the lack of tourists, getting international tourists back to the region, and uncertainty about the future.







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1. CPT International terminal passenger performance

Year/Month	2019	2020	2021	2021		2022			
				Nov	Dec	Jan	Feb	Mar	Apr (1 – 24)*
Two-way passengers	2 606 398	810 811	525 441	96 232	76 522	98 211	125 861	161 064	122 973
Passenger recovery*	100%	31%	20%	38%	27%	35%	52%	61%	74%
Average load factor	82%	63%	46%	Arr 67% Dep 59%	Arr 61% Dep 55%	Arr 65% Dep 67%	Arr 76% Dep 69%	Arr 71% Dep 82%	Arr 79% Dep 83%

Passenger data source: ACSA

* Passenger recovery compared to same period in 2019

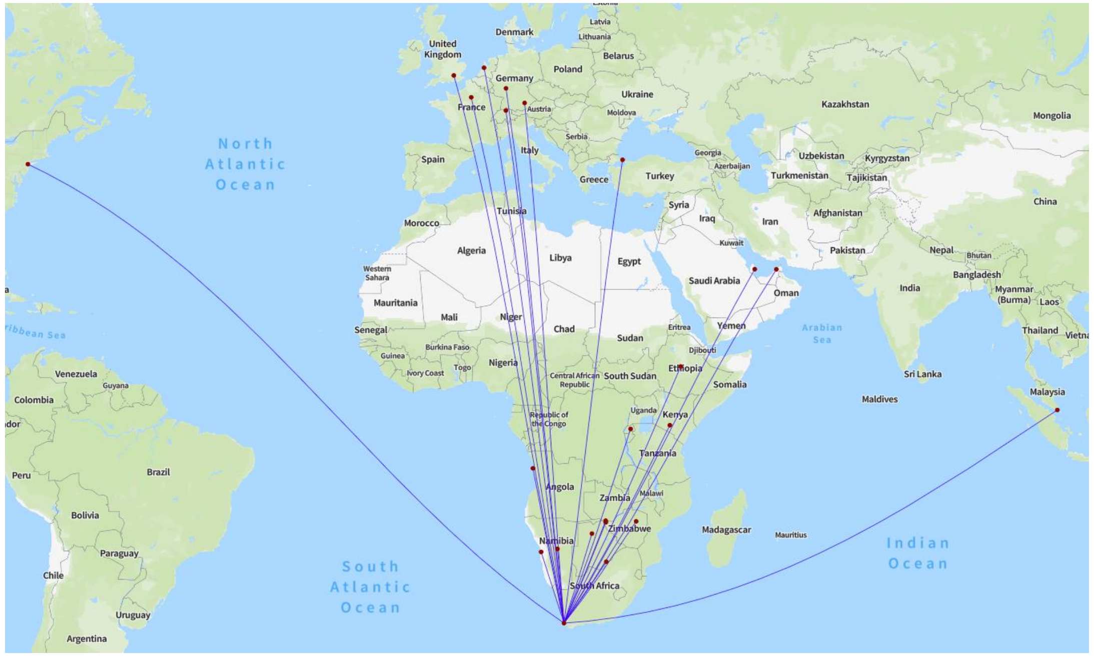
* April 2022 data preliminary

* Two-way passengers: The sum of arrival and departure passengers

* Average load factor: The % of available seats that is occupied on a flight

Operating carriers

British Airways, Kenya Airways (The Pride of Africa), Singapore Airlines, Air Botswana, Ethiopian, edelweiss, Lufthansa, RwandAir, KLM, FlyNamibia, United, TAAG, Qatar Airways, Airlink, Turkish Airlines, Emirates



Source: OAG Schedules Analyser

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2. CPT Domestic terminal passenger performance

Year/Month	2019	2020	2021	2021		2022			
				Nov	Dec	Jan	Feb	Mar	Apr (1 – 24)*
Two-way passengers	8 363 307	3 167 542	4 221 365	457 599	520 508	479 942	462 219	556 644	419 008
Passenger recovery*	100%	38%	50%	66%	66%	74%	71%	72%	71%
Average load factor	78%	64%	67%	Arr 77% Dep 78%	Arr 78% Dep 72%	Arr 73% Dep 78%	Arr 79% Dep 76%	Arr 82% Dep 84%	Arr 82% Dep 82%

* Passenger recovery compared to same period in 2019

* April 2022 data preliminary

* Two-way passengers: The sum of arrival and departure passengers

* Average load factor: The % of available seats that is occupied on a flight

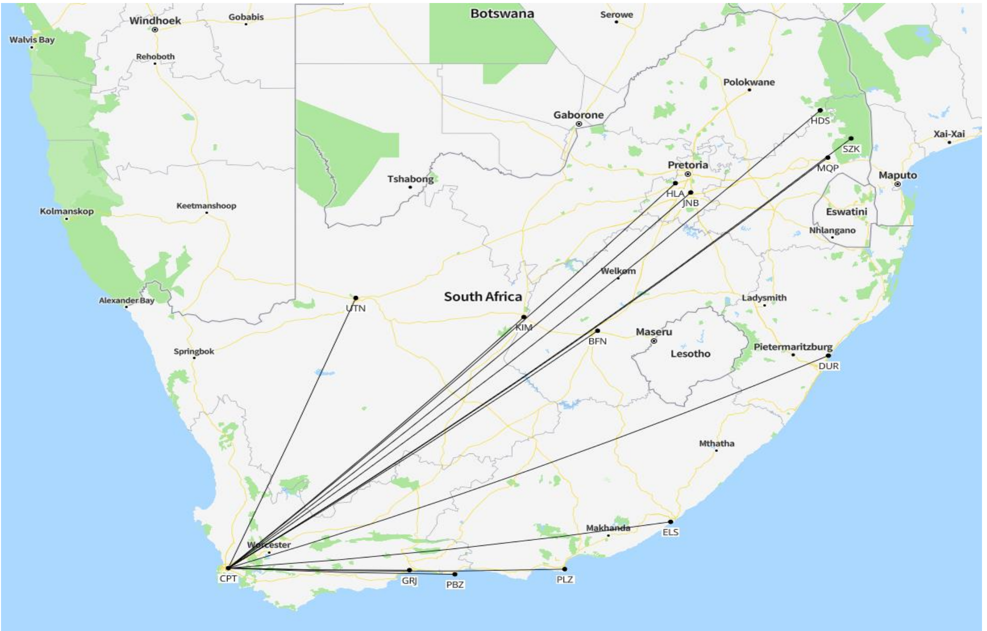
Passenger data source: ACSA

Operating carriers

FlyCemAir | FlySafair for the love of flying | AIRLINK

kulula.com | BRITISH AIRWAYS | lift

SOUTH AFRICAN AIRWAYS



Source: OAG Schedules Analyser

3. George Airport (GRJ) passenger performance

Year/Month	2019	2020	2021	2021		2022			
				Nov	Dec	Jan	Feb	Mar	Apr (1 – 24)*
Two-way passengers	832 981	340 438	536 886	56 129	70 708	57 371	53 820	70 528	52 970
Passenger recovery*	100%	41%	64%	79%	73%	86%	87%	97%	100%

Passenger data source: ACSA

* Passenger recovery compared to same period in 2019
* April 2022 data preliminary
* Two-way passengers: The sum of arrival and departure passengers

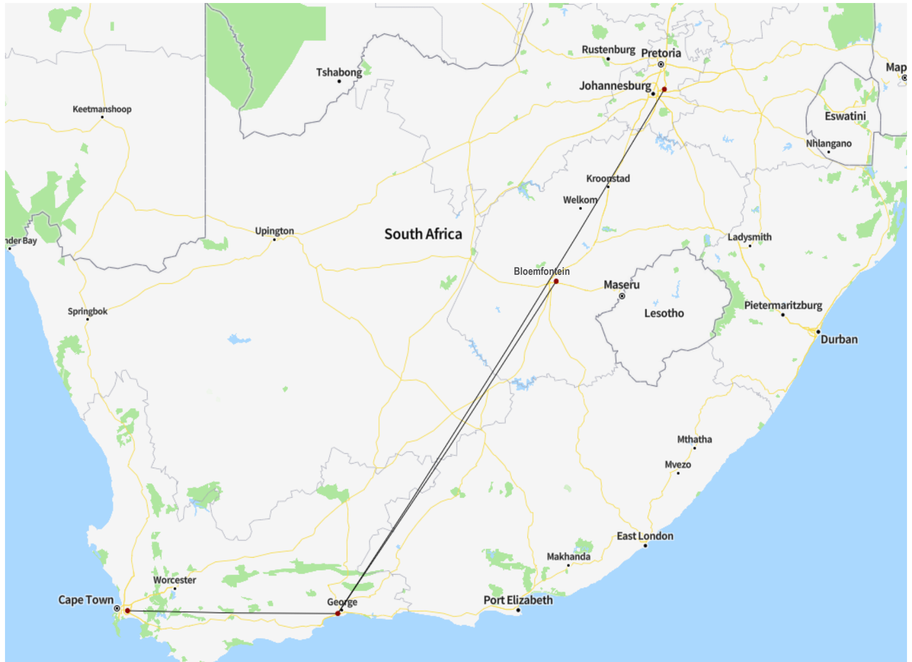
Operating carriers

FlyCemAir

FlySafair For the love of flying

kulula.com

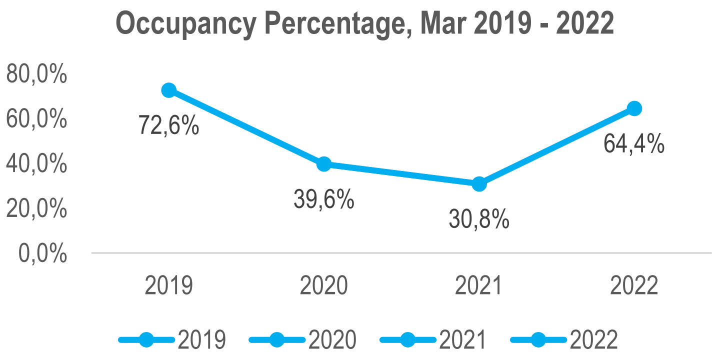
AIRLINK



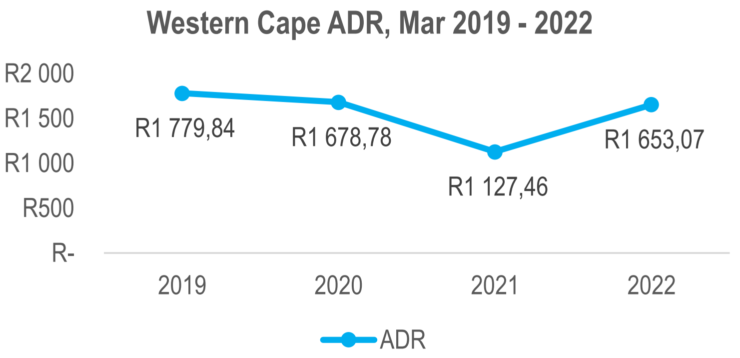
Source: OAG Schedules Analyser

4. Hotel Occupancy in the Western Cape

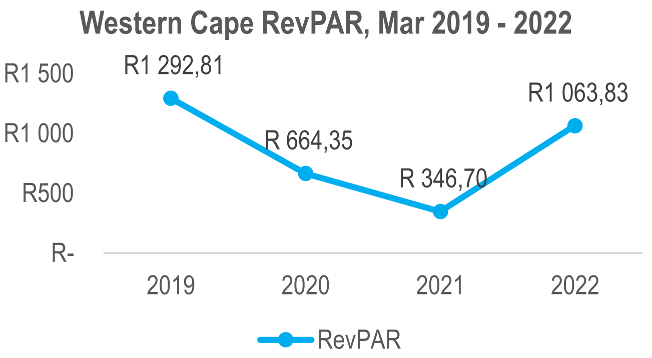
- **Occupancy** in the Western Cape, at **64.4%** in March 2022, **more than doubled** when compared to 30.8% in the same month in 2021, reaching a **recovery rate of 89%** when compared to the 72.6% occupancy in March 2019.
- **The Average Daily Rate (ADR)** for the Western Cape grew to **R1, 653.07** in March 2022 with a **recovery rate of 93%** of its 2019 figure.
- At **R1, 063.83** in March 2022, **RevPAR (Revenue Per Average Room) more than tripled** on its 2021 figure and **recovered to 82%** of what it was in March 2019.



Source: STR, 2022



Source: STR, 2022

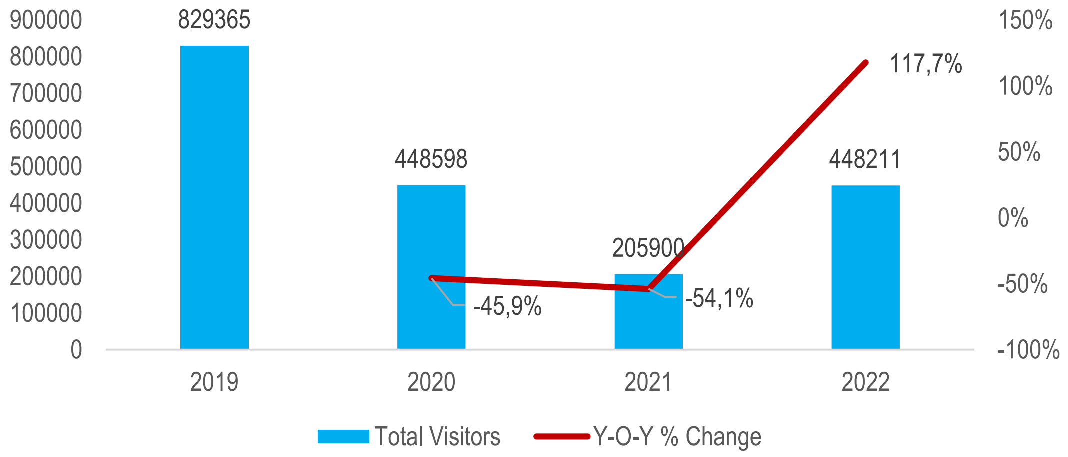


Source: STR, 2022

5. Western Cape Attractions

- Visitors to 26 participating attractions across the province recorded a total of **448 211 visitors** in March 2022, a **118% growth in the number of visitors** when compared to the same month last year and more than half of what it was in March 2019.
- All the attractions listed experienced high year on year growth in visitor numbers this month, except for De Mond Nature Reserve (-26%), Shipwreck Museum (-52%), West Coast National Park (-10%), Protea Tractor Trip (-7%) and Birds Paradise (-3%), which saw a decline in visitors when compared to March 2021.

Visitors to participating Western Cape Attractions, Mar 2019 - 2022



Attractions	Mar 2021/2022 % Change	Mar 2019/2022 Recovery %
Cape Town		
Table Mountain National Park	+150%	53%
Table Mountain National Park: Boulders	+256%	48%
Table Mountain National Park: Cape of Good Hope	+134%	45%
Table Mountain Aerial Cableway	+231%	58%
Kirstenbosch National Botanical Garden	+32%	61%
Robben Island	+328%	39%
Cape Overberg		
Cape Agulhas Lighthouse	Did not open in Mar 2021	91%
Agulhas National Park	+1076%	90%
Bontebok National Park	+8%	71%
De Hoop Nature Reserve	+150%	117%
De Mond Nature Reserve	-26%	39%
Harold Porter National Botanical Garden	+40%	119%
Stony Point	+291%	71%
Shipwreck Museum	-52%	15%
Garden Route & Klein Karoo		
Cango Caves	+208%	39%
Wilderness National Park	+41%	82%
Tsitsikamma National Park	+78%	50%
Knysna National Park	+47%	111%
Weskus		
West Coast National Park	-10%	63%
!Khwattu	+106%	84%
Old Jail	+15%	60%
Cape Karoo		
Karoo National Park	+18%	87%
Cape Winelands		
Avalon Springs (day visitors)	+45%	94%
Protea Tractor Trip	-7%	142%
Birds Paradise	-3%	88%
Viljoensdrift River Cruises	+35%	96%

6. Cape Town Cruise Terminal Performance

- The cruise industry reopened for South Africa on the 1st of October 2021 and runs annually from October to May.
- Based on ship operator bookings we are expecting a strong recovery performance for the 2022/2023 Season.
- The number of ships calling in 2022/2023 are expected to be similar to the planned 2020/2021 season, which was interrupted by COVID.
- The expected types of cruise lines is a combination of large luxury liners, smaller elite cruise lines and elite expedition cruise lines.

Performance Data Cape Town

CAPE TOWN
CRUISE TERMINAL

										TOTAL PAX			SHIP CALLS		NO OF SHIPS	
Season	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Total Pax Season Target	Total PAX actual YTD	Total PAX Forecast FY	Total Ships Calls Forecast	Total Ships Calls Actual YTD	Total Ships Forecast	Total Ships Actual YTD
2020_2021	0	513	8 870	34 623	53 930	45 590	22 123	7 067	0	172 716	0	0	102	0	29	0
2021_2022	0	0	2 143	4 436	7 658	1 640	1 982	3 000	2 303	11 349	6404	23 162	32	13	12	6
2022_2023	0	1 583	14 073	34 802	55 990	42 676	23 300	17 656	777	93 520	0	190 857	104	0	28*	0
2023_2024	0	0	16 194	32 419	60 120	43 720	25 503	16 595	1 606	96 117	0	196 157***	105	0	26**	0

* 5 new ships
** 4 new ships & 5 return ships
*** Estimated at 67% of V&A Waterfront Cruise Terminal Target of 300 000 passengers

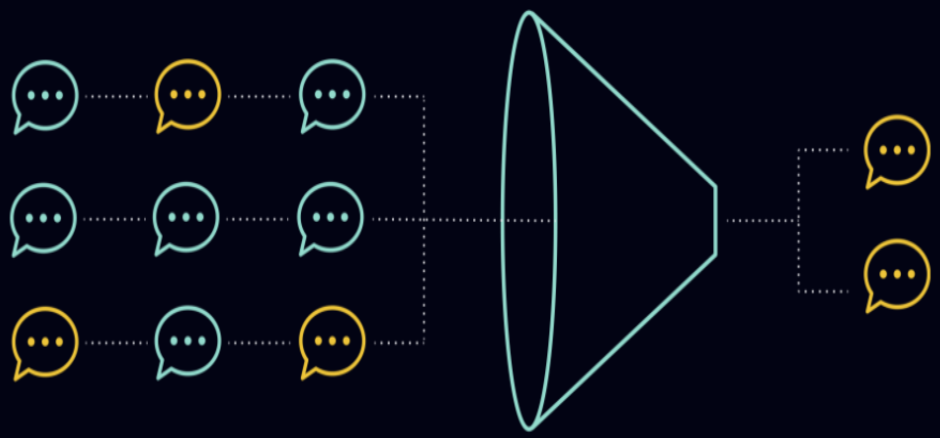
An Inspiring Place To Do Business

Note: Ship stats are measured in ship calls (how many times the port of cape town receives a ship in) and the number of ships in total is also included

Tourism Sentiment Analysis for the Western Cape

7. Tourism Sentiment for the Western Cape

ESSENTIAL DATA IN REALTIME

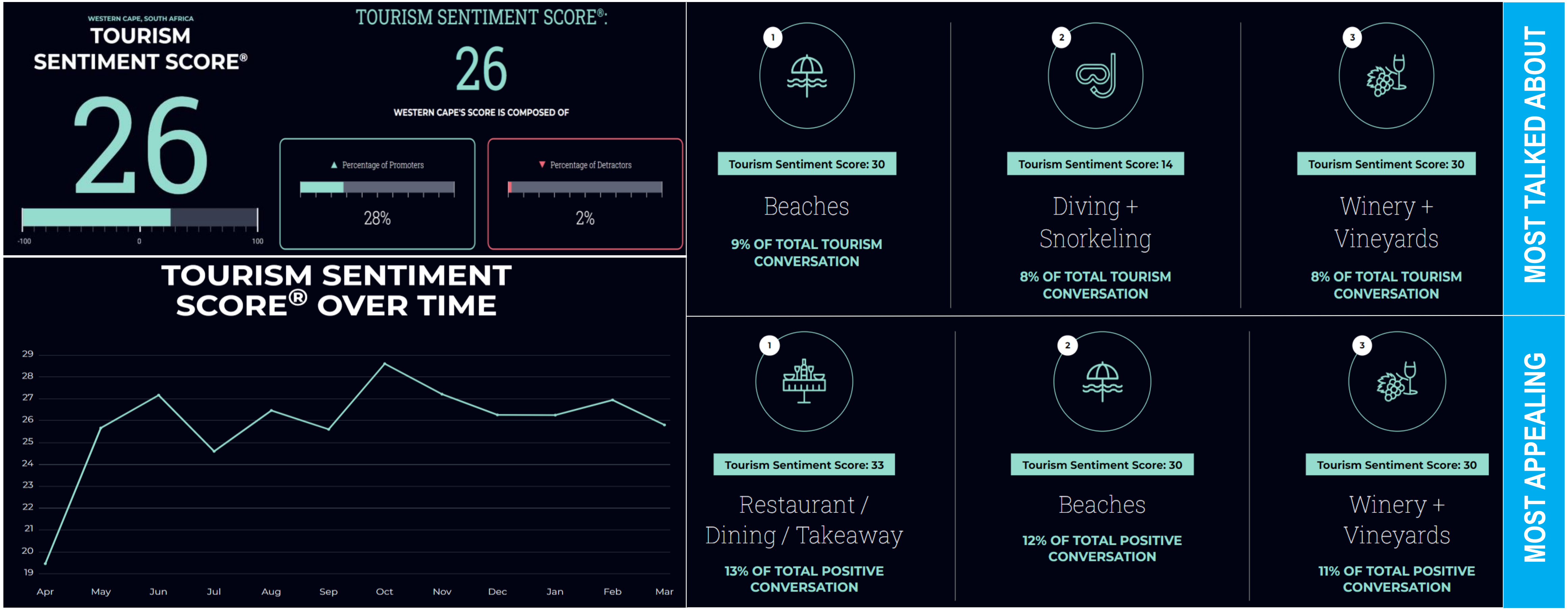


TOURISM SENTIMENT SCORE® is a consolidated measure of a destination's ability to generate positive word of mouth about its tourism offering. It focuses solely on online conversations that reference or affect a potential traveller's perceptions of a destination's tourism offering.

GATHERS DATA FROM	CURRENTLY TRACKS	AGGREGATES DATA FROM	RELIES ON
500k+ online, peer-to-peer communication platforms	**19,500+** global destinations	**1m+** peer-to-peer, online conversations	**unprompted and unbiased**

Source: TSI, 2022

7. Tourism Sentiment for the Western Cape



Source: TSI, 2022

7. Tourism Sentiment for the Western Cape

- Tourism Sentiment is based on **14 118 conversations** analyzed between 1 and 31 March 2022.
- The **biggest volume** of conversations was around **outdoor activities**.
- **Highest sentiment** was driven by **Destination Services** (33), which includes conversations about accommodation, tours, conference and conventions, and weddings.
- High sentiment also in **Food + Culinary** (30) and **Relaxation and Wellness** (30).
- **Weddings** (50) and **Spa and Wellness** (43), though smaller in volume, had particularly high sentiment.
- **Safety** drove the **lowest sentiment**

		WESTERN CAPE		
CATEGORIES	VOLUME COMPARISON	Volume	Emotion	Sentiment
Outdoor Activities		36% ▲ 3%	Joy	23 Average
Food + Culinary		16% ▼ 4%	Joy	30 Average
Relaxation + Wellness		11% ▼ 3%	Joy	30 Average
Destination Services		10% ▲ 3%	Joy	33 Average
Amenities + Entertainment		9% ▲ 0%	Joy	28 Average
Access + Transportation		7% ▼ 3%	Joy	14 Average
Culture + History		6% ▲ 0%	Joy	18 Average
Safety		3% ▲ 0%	Sadness	8 Average

Source: TSI, 2022

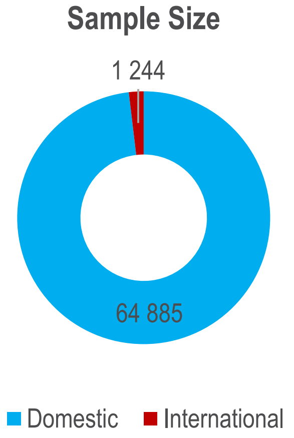
Visitor Trends
Mobile Location Data Insights

8. Western Cape Mobile Location Data Insights

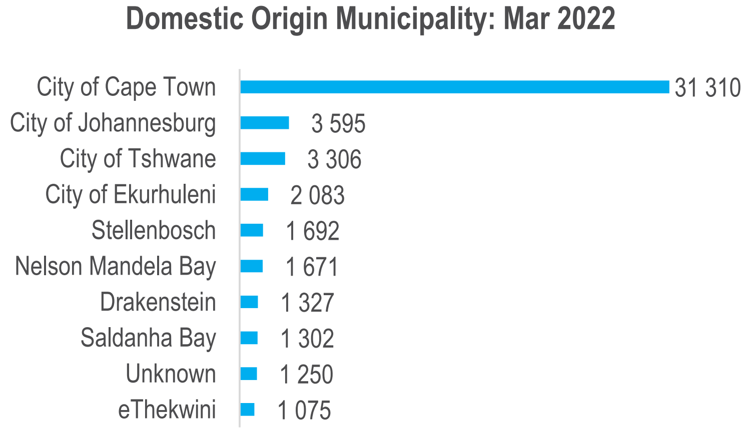
- What is mobile location data?
  - Geo or spatial data from smartphones. When a user installs an app, they are often asked to share their location data with the company which provides the app, and other companies who are partners with the app publisher.
  - Users can opt in to location sharing (or choose 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.

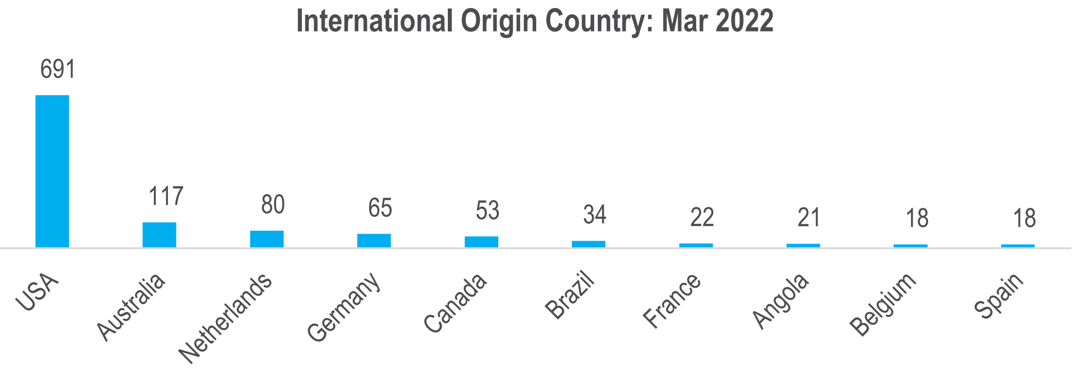
The insights in this report represents mobile location data from a sample of **64 885 domestic** and **1 244 international** tourists who visited the Western Cape in March 2022. Within the domestic data set, close to half of the sampled tourists were from the City of Cape Town and from the international sampled tourists, 691 were from the USA.



Source: Rove, 2022



Source: Rove, 2022

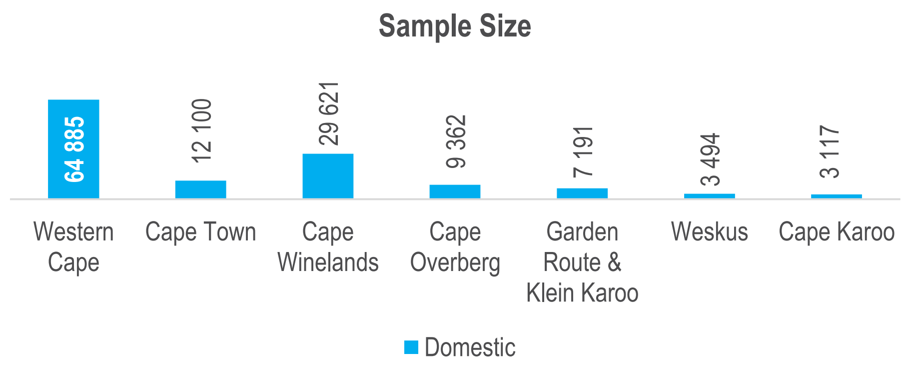


Source: Rove, 2022

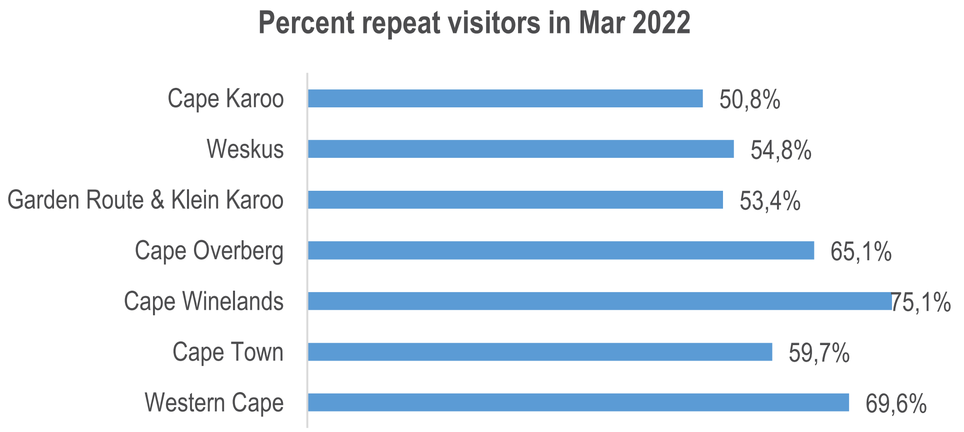
8.1. Mobile Insights: Domestic Visitor Trends

- In March 2022, the Cape Winelands (46%) and Cape Town (19%) saw the most domestic visitors in terms of volume of sample size and Cape Karoo (5%) had the least.

- The Cape Winelands (75%) was the most popular region for repeat visits, followed by the Cape Overberg (65%). The Cape Winelands had a slightly higher repeater rate than the general average for the province (69,6%).



Source: Rove, 2022



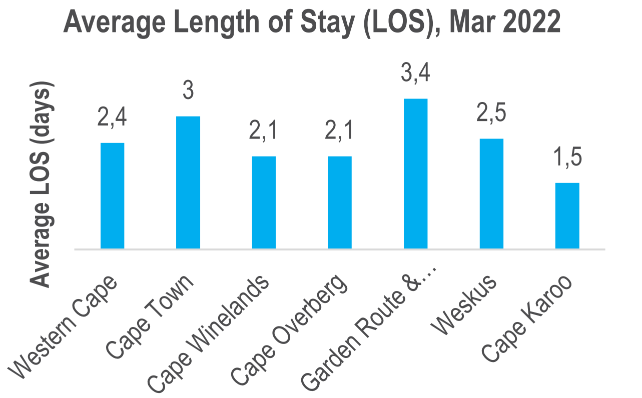
Source: Rove, 2022

8.1. Mobile Insights: Domestic Visitor Trends

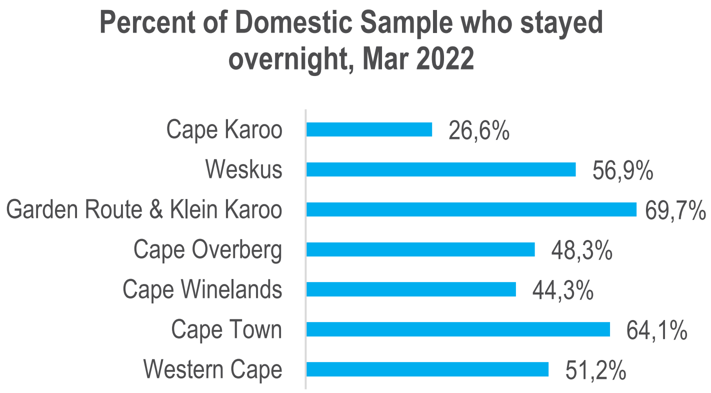
- On average, domestic visitors spent the longest time in the Garden Route & Klein Karoo (3,4 days) and the shortest time in the Cape Karoo (1,5 days).

- More than two thirds of sampled tourists stayed overnight in the Garden Route & Klein Karoo, which is higher than the general average for the province (51,2%). In contrast, visitors to the Cape Karoo were more likely to stay for the day.

- An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.



Source: Rove, 2022



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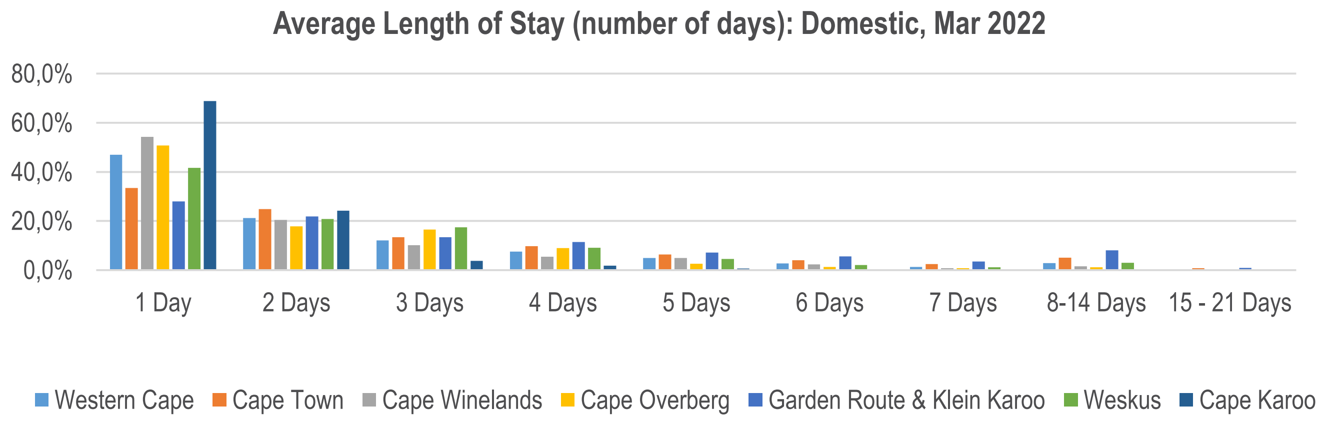
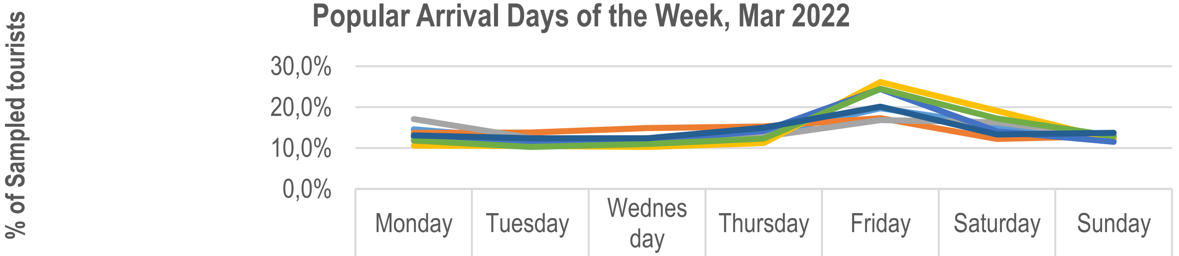


Source: Rove, 2022

8.1. Mobile Insights: Domestic Visitor Trends

- Domestic visitors to the province were most likely to arrive on a Friday and depart on a Sunday.
- In the Cape Winelands, Monday (17,1%) and Friday (16,8%) were the most popular arrival days and Friday was also the most common day for departure in March 2022.
- Domestic visitors to the Garden Route & Klein Karoo arrived mostly on a Friday (24,4%) and departed a Sunday (18,2%) or Monday (17,8%).

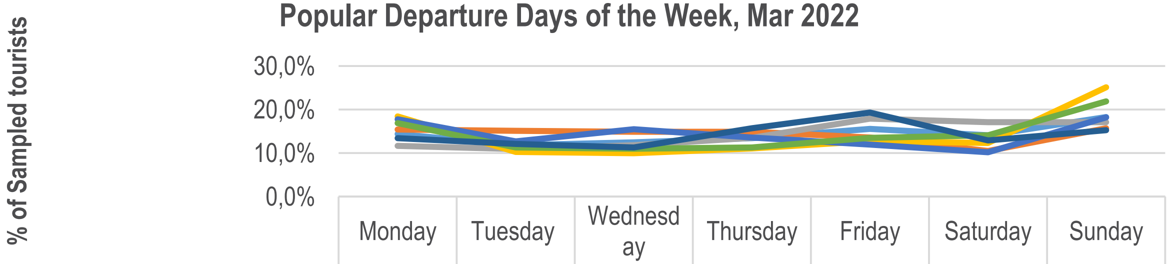
Popular Arrival Days of the Week, Mar 2022



	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Western Cape	14,6%	12,2%	12,1%	13,3%	19,7%	15,6%	12,6%
Cape Town	13,7%	13,8%	14,9%	15,3%	17,3%	12,2%	12,9%
Cape Winelands	17,1%	12,5%	11,8%	12,8%	16,8%	16,3%	12,7%
Cape Overberg	10,6%	10,5%	10,3%	11,2%	26,1%	19,1%	12,1%
Garden Route & Klein Karoo	12,8%	11,3%	11,7%	14,2%	24,4%	14,1%	11,5%
Weskus	11,8%	10,3%	11,0%	12,3%	24,5%	17,2%	12,9%
Cape Karoo	13,1%	12,4%	12,4%	15,0%	20,1%	13,3%	13,7%

Source: Rove, 2022

Popular Departure Days of the Week, Mar 2022



	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Western Cape	14,4%	11,8%	12,5%	13,4%	15,6%	14,1%	18,3%
Cape Town	15,4%	15,1%	14,9%	14,9%	13,6%	10,5%	15,7%
Cape Winelands	11,7%	10,9%	11,8%	13,5%	17,9%	17,1%	17,1%
Cape Overberg	18,4%	10,3%	10,0%	11,1%	12,8%	12,3%	25,1%
Garden Route & Klein Karoo	17,8%	12,7%	15,5%	13,6%	12,0%	10,2%	18,2%
Weskus	16,9%	11,3%	11,0%	11,3%	13,5%	14,1%	21,9%
Cape Karoo	13,4%	12,1%	11,3%	15,7%	19,3%	12,9%	15,3%

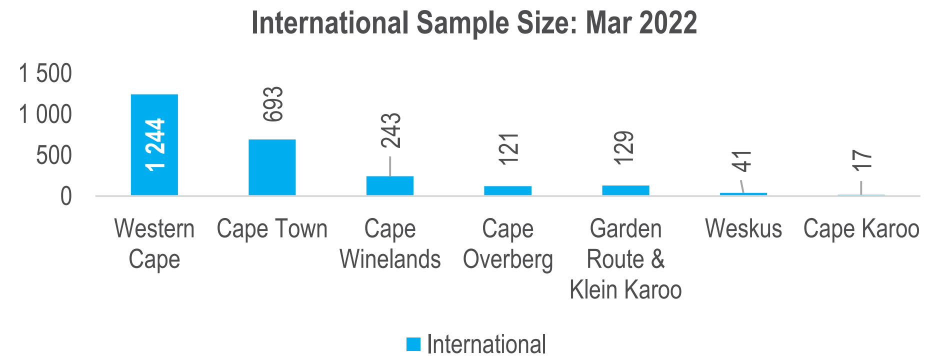
Source: Rove, 2022

- In the Cape Karoo, which saw majority day visitors, Thursday and Friday were the most popular arrival and departure days.
- Cape Town arrival days were most common on Thursday (15,3%) and Friday (17,3%) and departure was most popular on Sunday (15,7%) and Monday (15,4%).
- Friday (26,1%) was the most popular arrival day in the Cape Overberg and Sunday (25,1%) was its most common departure day.
- In the Weskus, Friday (24,5%) and Sunday (21,9%) were also the most popular arrival and departure days, respectively.

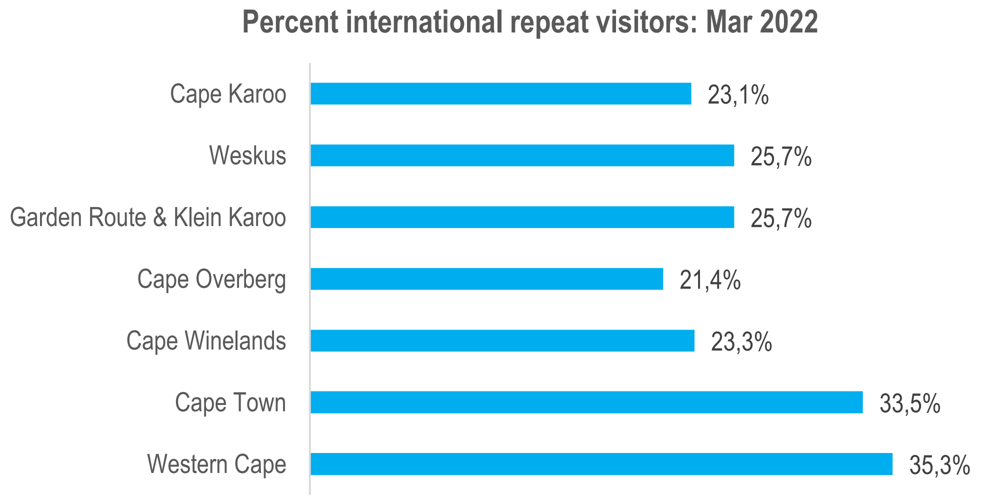
8.2. Mobile Insights: International Visitor Trends

- More than half of the sampled international tourists visited Cape Town (693) followed by Cape Winelands (243) and Garden Route & Klein Karoo (129). Visitor trends for the Cape Karoo region is based on a sample size of only 17 international tourists.

- Cape Town, Weskus and the Garden Route & Klein Karoo saw the most international repeat visitors in March 2022

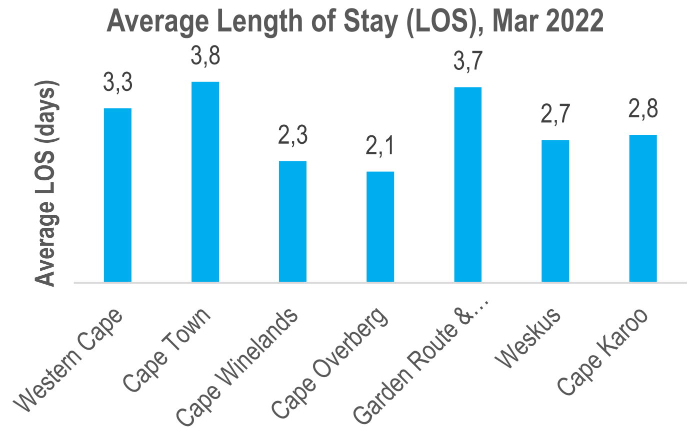


Source: Rove, 2022

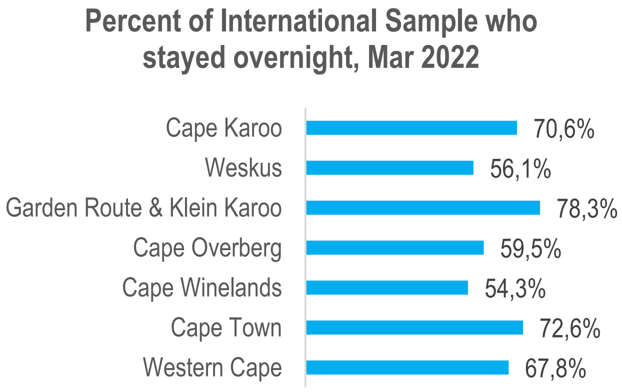


8.2. Mobile Insights: International Visitor Trends

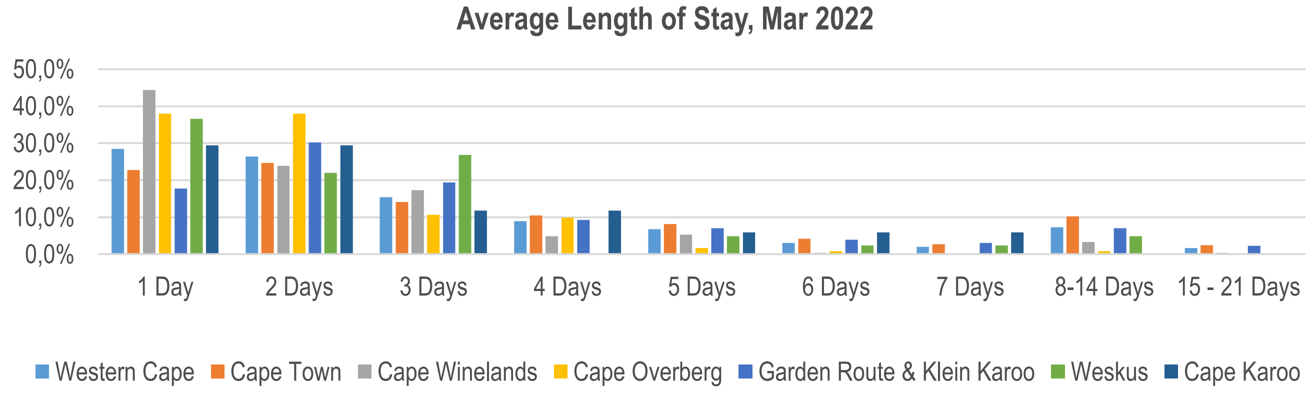
- On average, international visitors spent the longest time in Cape Town (3,8 days) followed by Garden Route & Klein Karoo (3,7 days).
- More than 70% of sampled tourists stayed overnight in both Cape Town and the Garden Route & Klein Karoo as well as the Cape Karoo, which is slightly higher than the general average for the province (67,8%).
- An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.



Source: Rove, 2022



Source: Rove, 2022

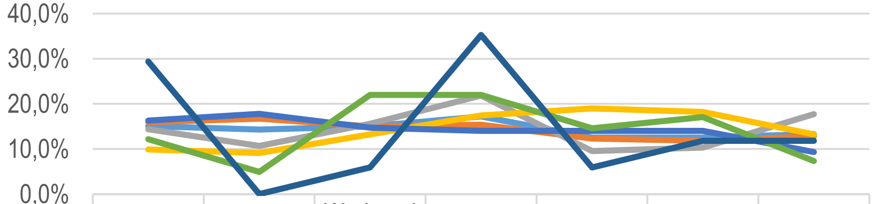


Source: Rove, 2022

8.2. Mobile Insights: International Visitor Trends

- International visitors to the province were most likely to arrive on a Thursday or Sunday and depart on Monday or Thursday.
- In the Cape Winelands, Sunday and Thursday were both the most popular arrival and departure days, respectively.
- International visitors to the Garden Route & Klein Karoo arrived mostly on a Saturday (17,8%) and Wednesday (16,3%) and departed on a Monday (16,3%) or Tuesday (17,8%).

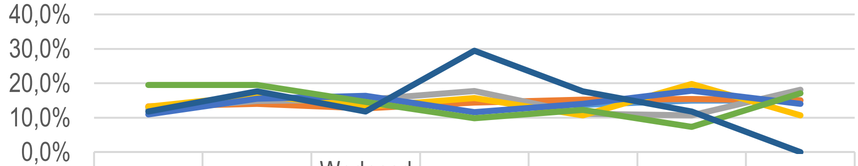
Popular Departure Days of the Week, International, Mar 2022



	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Western Cape	15,1%	14,3%	15,0%	17,2%	12,5%	12,5%	13,3%
Cape Town	15,9%	16,7%	15,0%	15,4%	12,3%	11,8%	12,8%
Cape Winelands	14,4%	10,7%	15,6%	21,8%	9,5%	10,3%	17,7%
Cape Overberg	9,9%	9,1%	13,2%	17,4%	19,0%	18,2%	13,2%
Garden Route & Klein Karoo	16,3%	17,8%	14,7%	14,0%	14,0%	14,0%	9,3%
Weskus	12,2%	4,9%	22,0%	22,0%	14,6%	17,1%	7,3%
Cape Karoo	29,4%	0,0%	5,9%	35,3%	5,9%	11,8%	11,8%

Source: Rove, 2022

Popular Arrival Days of the Week: International, Mar 2022



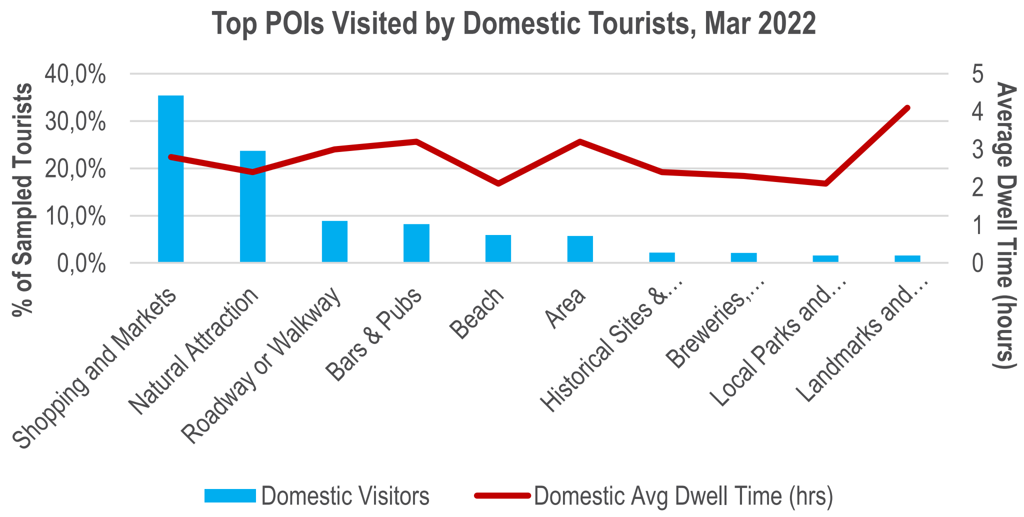
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Western Cape	13,0%	14,8%	13,7%	15,0%	13,7%	14,9%	15,0%
Cape Town	13,3%	14,0%	12,7%	14,4%	15,2%	15,4%	15,0%
Cape Winelands	12,3%	14,8%	15,2%	17,7%	11,1%	10,7%	18,1%
Cape Overberg	13,2%	16,5%	13,2%	15,7%	10,7%	19,8%	10,7%
Garden Route & Klein Karoo	10,9%	15,5%	16,3%	11,6%	14,0%	17,8%	14,0%
Weskus	19,5%	19,5%	14,6%	9,8%	12,2%	7,3%	17,1%
Cape Karoo	11,8%	17,6%	11,8%	29,4%	17,6%	11,8%	0,0%

Source: Rove, 2022

- In the Cape Karoo, Thursday was popular for both arrival and departure.
- Cape Town arrival days were most common on Saturday (15,4%) and Friday (15,2%) and departure was most popular on Tuesday (16,7%) and Monday (15,9%).
- Saturday (19,8%) was the most popular arrival day in the Cape Overberg and Friday was the most common departure day (19%).
- In the Weskus, Monday and Tuesday (19,5%) were the most popular arrival days and Wednesday and Thursday (22%) were common departure days.

8.3. Points of Interest (POIs) Visited

- Shopping and markets was the most popular type of attraction visited for both domestic and international tourists.
- Domestic visitors spent on average 2,8 hours shopping while international visitors shop for 2,7 hours.
- Natural attractions, particularly Table Mountain and Cape Point were popular with both domestic and international tourists and domestic visitors spent a lot of time at Knysna Waterfront as well.
- Bars & Pubs in the city centre were the third most popular point of interest for international tourists who spent on average 3,4 hours at the location.
- Roadways & walkways, which include Stanford Valley, Sea Point Promenade, Hemel-en-Aarde Valley, Clarence Drive and Ashton Bridge, ranked third among the top POIs visited by domestic tourists, with an average dwell time of 3 hours.

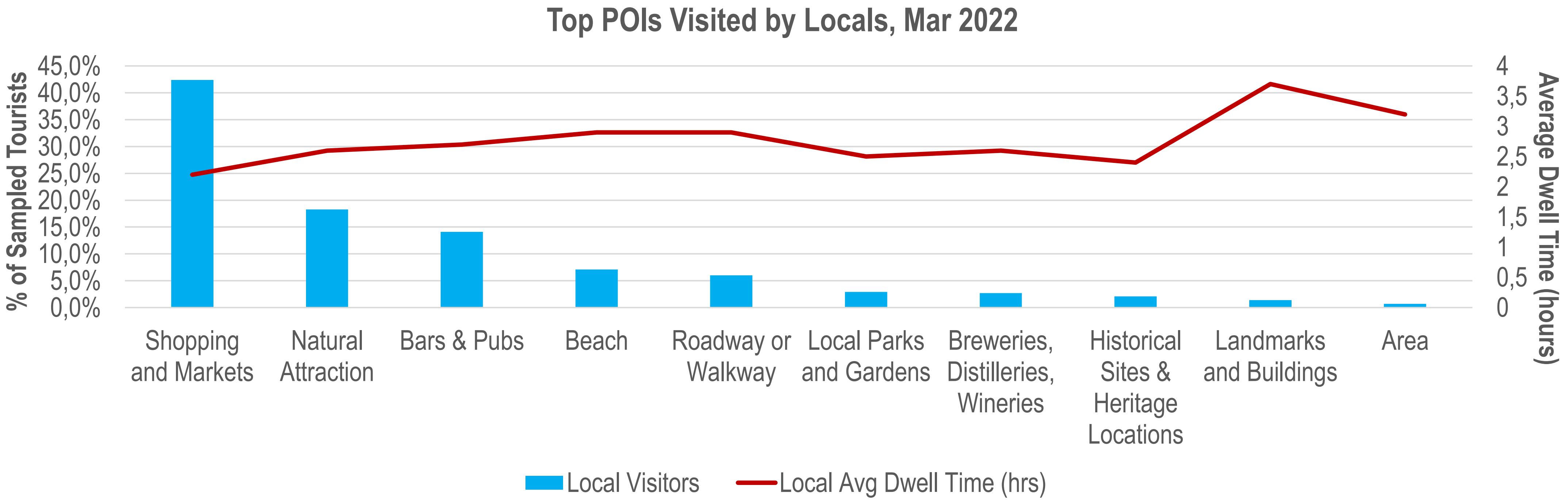


Source: Rove, 2022

Source: Rove, 2022

8.3. Points of Interest (POIs) Visited

- Similar to domestic tourist trends, shopping and markets, natural attractions and bars and pubs, ranked as the top three points of interests for local visitors. Locals spent on average 2,2 hours at shops and markets, 2,6 hours at natural attractions and 2,7 hours at bars and pubs.



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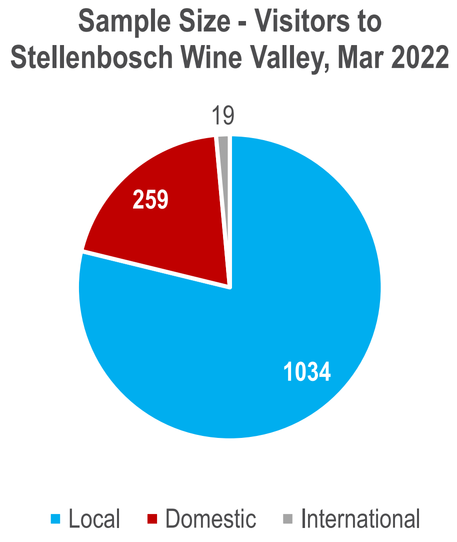
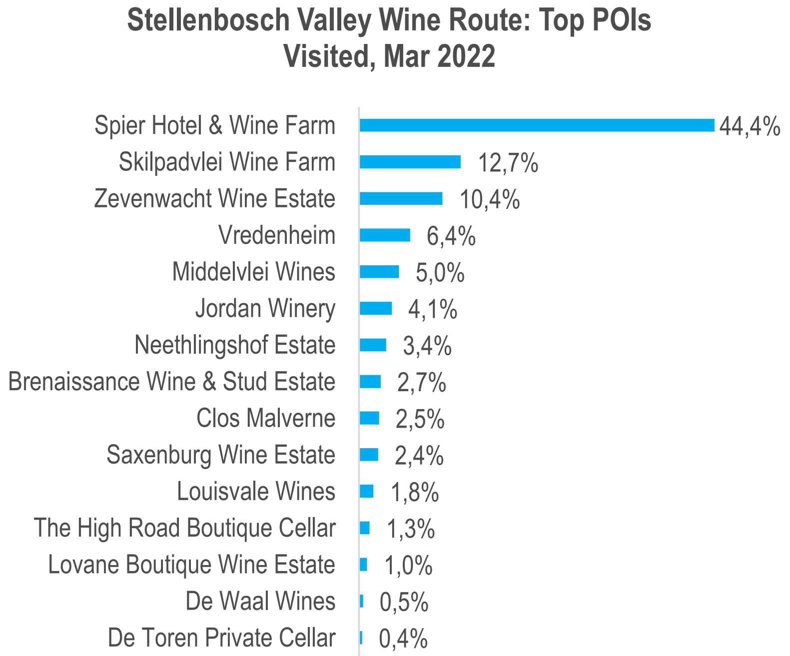
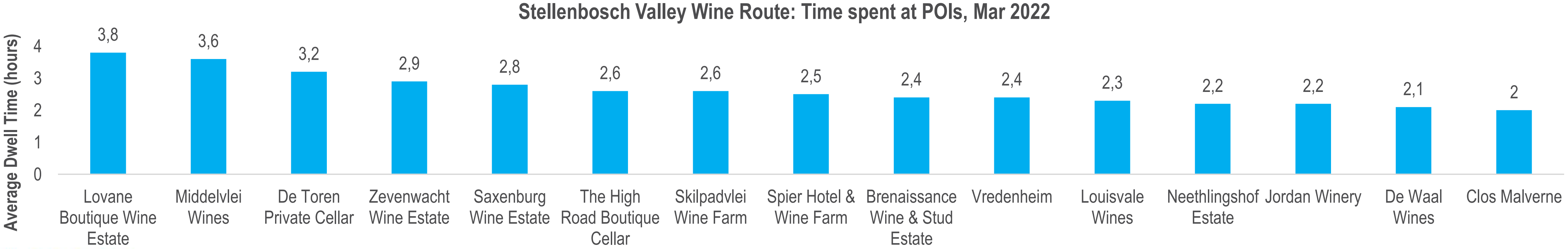
8.4. Stellenbosch Valley Wine Route

- From a sample size of 1312 tourists who visited the Stellenbosch Wine Route close to 80% were locals, 20% were domestic and 1,4% were international tourists.
- Spier was the most visited farm on the route, followed by Skilpadvlei and Zevenwacht. From the list of top 15, Lovane Boutique Wine Estate had the longest dwell time (based on data from only 115 tourists).







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, 2022

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
- 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 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
- Minimum duration of visit of 45 minutes excludes commuters driving through each city

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.

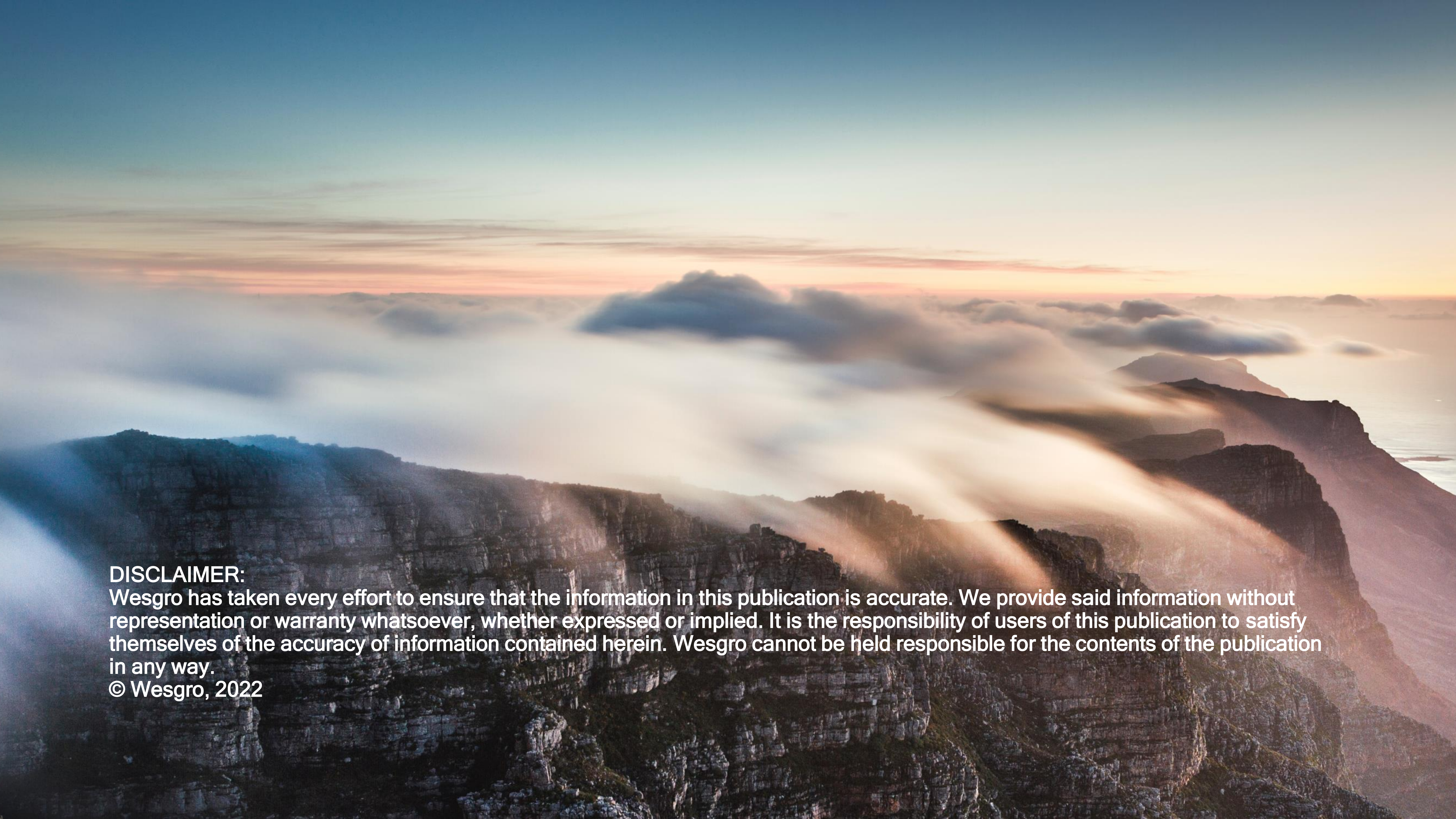
What are Tourist Segments?
- **Local Tourists:** Tourists who reside within the same Region.
- **Domestic Tourists:** Tourists who reside in South Africa outside of Western Cape
- **International Tourists:** Tourists who reside outside of South Africa

Source: Rove, 2022

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 d istricts.
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, 2022



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