



Tourism Research Overview July 2023

Cape Town & the Western Cape

WESGRO

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

An Inspiring Place To Do Business

Contents

1. Key Findings
2. Cape Town International Airport: International Terminal Performance and Recovery
3. Cape Town International Airport: Domestic Terminal Performance and Recovery
4. Cape Town International Airport Route and Airline Update
5. Performance of Air Arrivals to Cape Town: Jan - Jul 2023 YTD
6. Top Source Markets to Cape Town (via air): Jan - Jul 2023 YTD
7. Performance of Western Cape Attractions: July 2023
8. Mobile Location Data Insights: July 2023

Key Findings

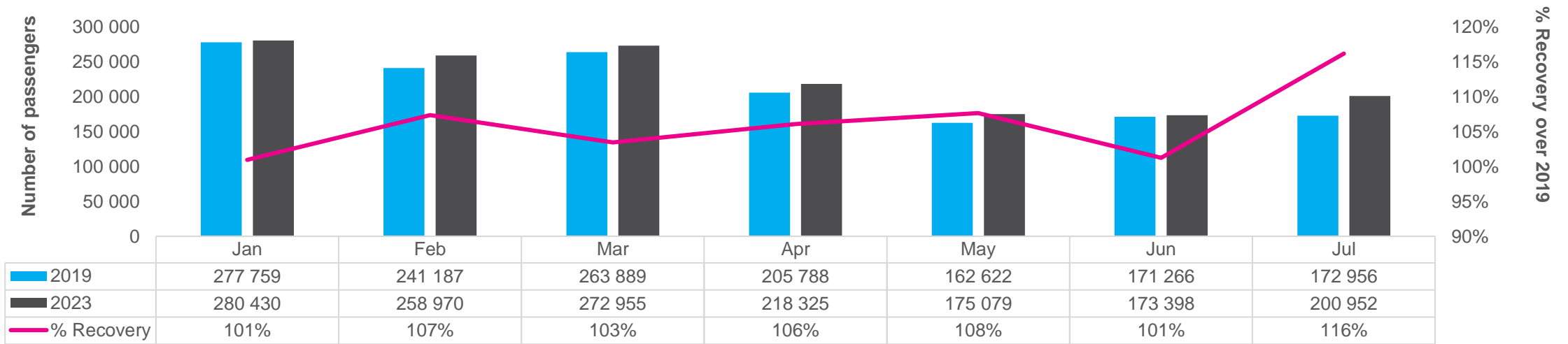
On the back of solid tourist arrivals and aviation recovery during the first six months of 2023, tourism growth remained steadfast into July 2023, portraying strong prospects of a booming winter season for the Western Cape. Key highlights of the overall tourism performance in July 2023 are outlined below:

- International two-way passengers remained strong between Jan and Jul 2023, reaching 1.6 million, exceeding pre-pandemic levels by 106% YTD and growing by 69% vs. Jan – Jul 2022.
- 3.8 million domestic two-way passengers passed through CTIA between Jan and Jul 2023, standing at 80% recovery against 2019 and a y-o-y growth of 11%.
- George Airport two-way passengers reached 449,837 between Jan and Jul 2023, a 3% y-o-y increase vs. Jan - Jul 2022.
- Between January and July 2023, Cape Town recorded a total of 503,820 tourist arrivals via air, of which 90% originated from overseas markets and 10% from the African continent. **Total tourist arrivals as well as overseas tourist arrivals via air remain at full recovery in July 2023 YTD** (cumulatively) vs. Jan – Jul 2019.
- **UK led as the top source market to Cape Town (via air) between January and July 2023**, closely followed by the US, Germany, Netherlands and France in the top 5 positions. The European market remains the largest contributor to tourist arrivals into Cape Town, with 6 out of the top 10 source markets originating from the continent.
- The cumulative total of tourist arrivals between January and July 2023 **reflected full recovery from 7 out of the top 10 source markets** to Cape Town (via air), against the same period in 2019 (Jan - Jul). These markets **included UK (105%), US (145%), Germany (106%), Netherlands (112%), Canada (105%), Italy (105%) and Zimbabwe (176%)**.
- Footfall to 21 participating attractions across the six regions of the Western Cape recorded a total of 469,854 visitors in July 2023, a 40% growth in the number of visitors when compared to July 2022 and a **full recovery of 118% against July 2019**.
- The top 5 highest year-on-year growth rates in July 2023 were recorded for Table Mountain National Park: Boulders (68%), !Khwa ttu (51%), Table Mountain National Park: Cape of Good Hope (50%), Table Mountain National Park (50%) and Table Mountain Aerial Cableway (48%).

International passenger recovery between Jan and Jul 2023 remains above pre-pandemic levels and stands at 106% YTD.

Year/Month	2019	2020	2021	2022	2023 ytd	2023					
						Feb	Mar	Apr	May	Jun	Jul
Two-way passengers	2 606 398	810 811	525 441	1 895 975	1 580 109	258 970	272 955	218 325	175 079	173 398	200 952
YoY growth percentage*	1%	-69%	-35%	261%	69%	106%	70%	39%	46%	39%	34%

INTERNATIONAL TWO-WAY PASSENGER RECOVERY, JAN-JUL 2023

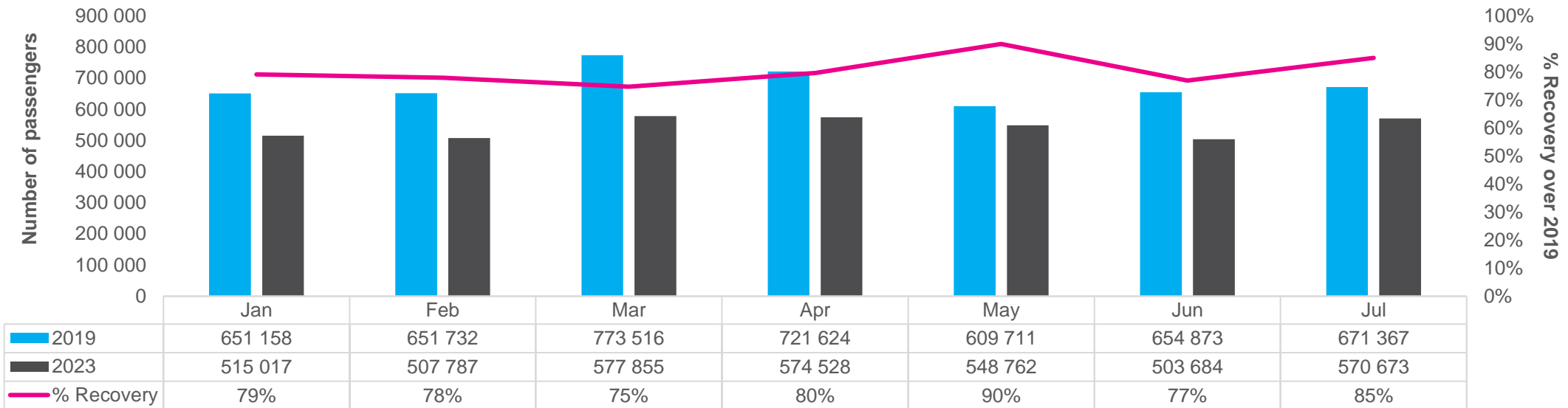


Source: ACSA, 2023

Domestic passengers at 80% recovery between Jan and Jul 2023

Year/Month	2019	2020	2021	2022	2023 ytd	2023					
						Feb	Mar	Apr	May	Jun	Jul
Two-way passengers	8 363 307	3 167 542	4 221 365	5 960 826	3 798 306	507 787	577 855	574 528	548 762	503 684	570 673
YoY growth percentage*	2%	-62%	33%	41%	11%	10%	-12%	7%	9%	24%	25%

DOMESTIC TWO-WAY PASSENGER RECOVERY, JAN-JUL 2023



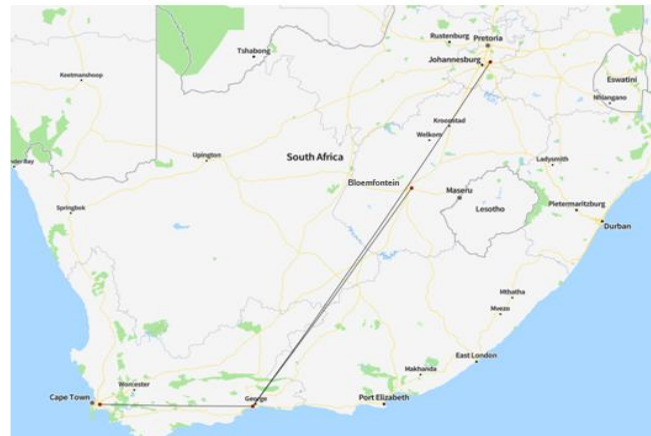
George Airport two-way passengers reached 449,837 between Jan and Jul 2023, 3% y-o-y increase vs. Jan - Jul 2022.

Year/Month	2019	2020	2021	2022	2023 ytd	2023					
						Feb	Mar	Apr	May	Jun	Jul
Two-way passengers	840 804	346 223	539 637	747 848	449 837	59 747	70 062	70 165	63 532	58 312	64 346
YoY growth percentage*	0%	-59%	56%	39%	3%	10%	-3%	-4%	3%	4%	2%

* Growth compared to the same period in the previous year

Source: ACSA, 2023

Operating carriers








CPT International schedule for May to October 2023

19 airlines, 25 destinations




Rest of Africa

-  **Air Botswana**, Gaborone (GBE), three times per week
-  **Ethiopian Airlines**, Addis Ababa (ADD), 11 flights a week
-  **Fly Namibia**, Windhoek (WDH), six times per week
-  **Kenya Airways**, Nairobi (NBO) direct, twice per week, Nairobi – Livingstone (LVI), twice per week and Nairobi - Victoria Falls (VFA), three times per week
-  **TAAG**, Luanda (LAD), daily
-  **RwandAir**, Kigali (KGL) - Harare (HRE), six times per week
-  **Airlink**, Windhoek (WDH), three times a day
Walvis Bay (WVB), daily
Harare (HRE), daily
Victoria Falls (VFA), six times per week
Maun (MUB), daily
Maputo (MPM), four times per week
-  **Air Mauritius**, Mauritius (MRU), twice per week
-  **Eswatini Air**, Manzini (SHO), 3 times per week started 2 June
-  **Proflight Zambia**, Lusaka (LUN), 2 times per week, started 1 July 2023




Europe

-  **Lufthansa**, Frankfurt (FRA), six times per week
-  **British Airways**, London Heathrow (LHR), daily
-  **KLM**, Amsterdam (AMS), daily
-  **Turkish Airlines**, Istanbul (IST), Daily flight. 5 times per week from 6 May
-  **Air Belgium**, Belgium (BRU), BRU-JNB-CPT-JNB-BRU, twice per week

North & South America

-  **United Airlines**, Newark (EWR), three times per week
Washington D.C (IAD), three times per week
-  **Delta Air Lines**, Atlanta (ATL), three times per week
-  **South African Airways**, Sao Paulo (GRU), twice weekly starting 31 Oct 2023

Asia & Middle East

-  **Emirates**, Dubai (DXB), double daily
-  **Qatar Airways**, Doha (DOH), 10 flights per week
-  **Singapore Airlines**, Singapore (SIN), SIN-JNB-CPT-JNB-SIN, daily



Source: OAG

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

Between January and July 2023, Cape Town recorded a total of **503,820** tourist arrivals via air, of which 90% originated from overseas markets and 10% from the African continent. Total tourist arrivals as well as overseas tourist arrivals via air remain at **full recovery** in July 2023 YTD (cumulatively) vs. Jan – Jul 2019.

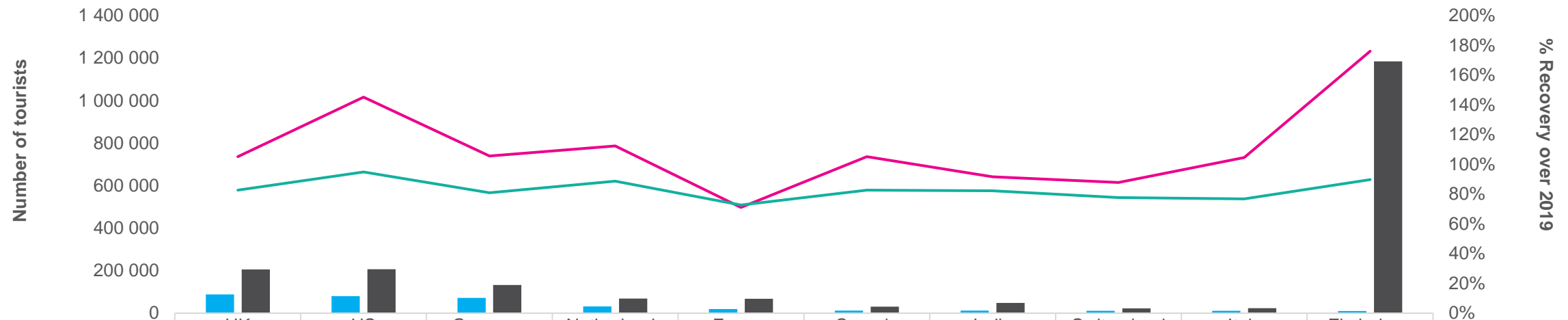
TOURIST ARRIVALS TO SOUTH AFRICA BY AIRPORT, JAN - JUL 2023			
Source Market	Cape Town	OR Tambo	King Shaka
Overseas Tourist Arrivals	453 279	582 604	16 374
Africa Tourist Arrivals	49 823	258 995	2 649
Total Tourist Arrivals	503 820	846 166	19 036
Overseas % Share of Total Tourists	90%	69%	86%

Source: StatsSA, 2023

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

- **UK led as the top source market to Cape Town (via air)** between January and July 2023, closely followed by the US, Germany, Netherlands and France in the top 5 positions. The European market remains the largest contributor to tourist arrivals into Cape Town, **with 6 out of the top 10 source markets originating from the continent.**
- The cumulative total of tourist arrivals between January and July 2023 reflected full recovery from **7 out of the top 10 source markets to Cape Town (via air)**, against the same period in 2019 (Jan - Jul). These markets included UK (105%), US (145%), Germany (106%), Netherlands (112%), Canada (105%), Italy (105%) and Zimbabwe (176%).

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



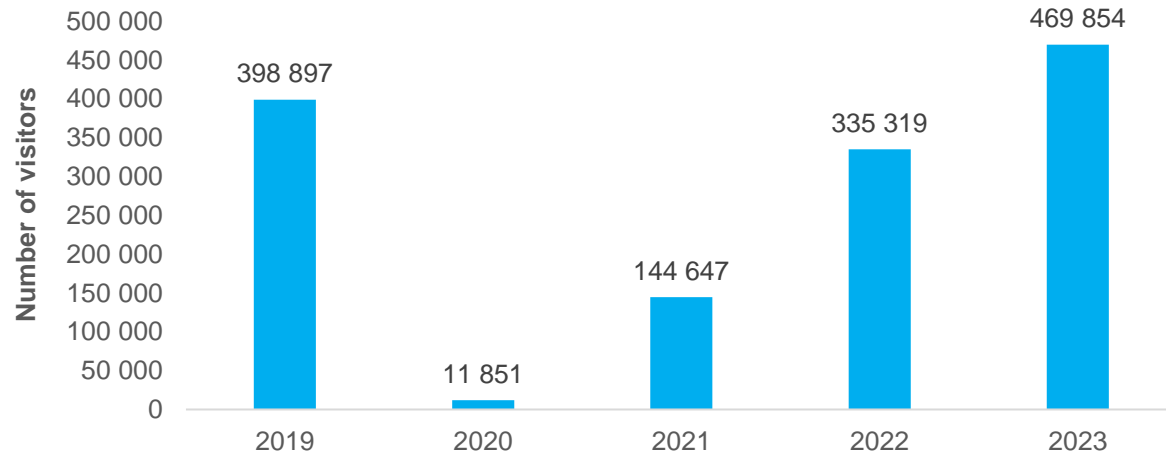
	UK	US	Germany	Netherlands	France	Canada	India	Switzerland	Italy	Zimbabwe
■ Cape Town (via air)	88 092	80 293	71 119	31 259	18 878	11 737	11 579	10 728	10 604	10 070
■ South Africa	204 885	206 015	132 302	68 421	67 000	30 400	47 905	22 498	23 595	1 184 354
— Cape Town % Recovery	105%	145%	106%	112%	71%	105%	92%	88%	105%	176%
— SA % Recovery	83%	95%	81%	89%	73%	83%	82%	78%	77%	90%

Source: StatsSA, 2023

Performance of Western Cape Attractions: July 2023

- Footfall to 21 participating attractions across the six regions of the Western Cape recorded a total of 469,854 visitors in July 2023, a **40% growth in the number of visitors** when compared to July 2022 and **a full recovery of 118% against July 2019**.
- The top 5 highest year-on-year growth rates in July 2023 were recorded for Table Mountain National Park: Boulders (68%), !Khwa ttu (51%), Table Mountain National Park: Cape of Good Hope (50%), Table Mountain National Park (50%) and Table Mountain Aerial Cableway (48%).

VISITORS TO WESTERN CAPE ATTRACTIONS, JULY 2019-2023



Western Cape Attractions	Jul 2022/2023 % Change	Jul 2019/2023 % Recovery
Cape Town		
Kirstenbosch National Botanical Garden	16%	85%
Table Mountain Aerial Cableway	48%	385%
Table Mountain National Park	50%	126%
Table Mountain National Park: Boulders	68%	108%
Table Mountain National Park: Cape of Good Hope	50%	92%
Robben Island	29%	170%
Overberg		
Agulhas National Park	4%	84%
Bontebok National Park	-11%	92%
Cape Agulhas Lighthouse	-14%	73%
Harold Porter National Botanical Garden	8%	152%
Shipwreck Museum	-66%	39%
Garden Route & Klein Karoo		
Cango Caves	28%	97%
Tsitsikamma National Park	9%	96%
Wilderness National Park	-14%	121%
Knysna National Park	-10%	179%
Weskus		
West Coast National Park	-4%	43%
!Khwa ttu	51%	170%
Winelands		
Protea Tractor Trip	-11%	107%
Birds Paradise	-5%	127%
Viljoensdrift River Cruise	-69%	34%
Cape Karoo		
Karoo National Park	4%	137%

Sources: LTO's, and Attractions, 2023

Visitor Trends Mobile Location Data Insights

WESGRO

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

An Inspiring Place To Do Business

Western Cape Mobile Location Data Insights

What is mobile location data?

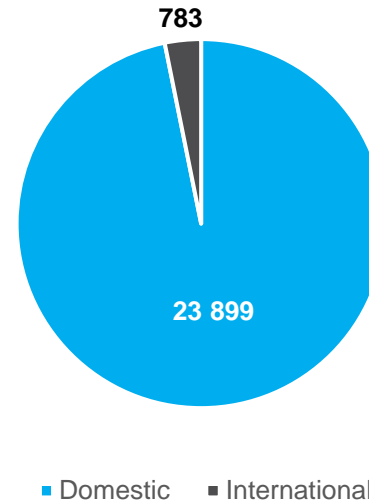
- Geo or spatial data from smartphones. When a user installs an app, they are often asked to share their location data with the company which provides the app, and other companies who are partners with the app publisher.
- Users can “opt in” to location sharing (or choose not to “opt in”). When they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

Why use mobile location data insights?

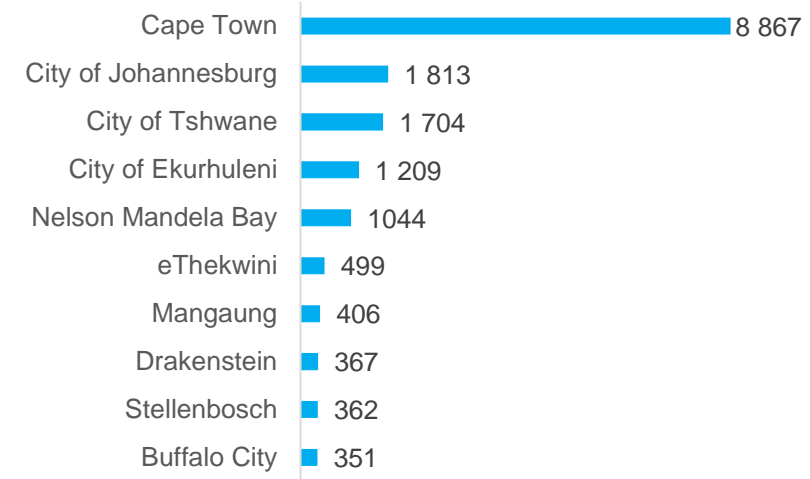
- Mobile location-based data offers a more granular lens on visitor behaviour and provides a much larger sample size.
- These insights aim to facilitate a better understanding of visitor movement throughout the Western Cape’s six region.
- Mobile location data serves as a sample. It is not 100% of visitors,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

The insights in this report represent mobile location data from a sample of **23,899 domestic** and **783 international** tourists who visited the Western Cape in July 2023. Within the domestic data set, **8,867** of the sampled tourists were from Cape Town and from the international sampled tourists, **140** were from Saudi Arabia and **136** from the United States.

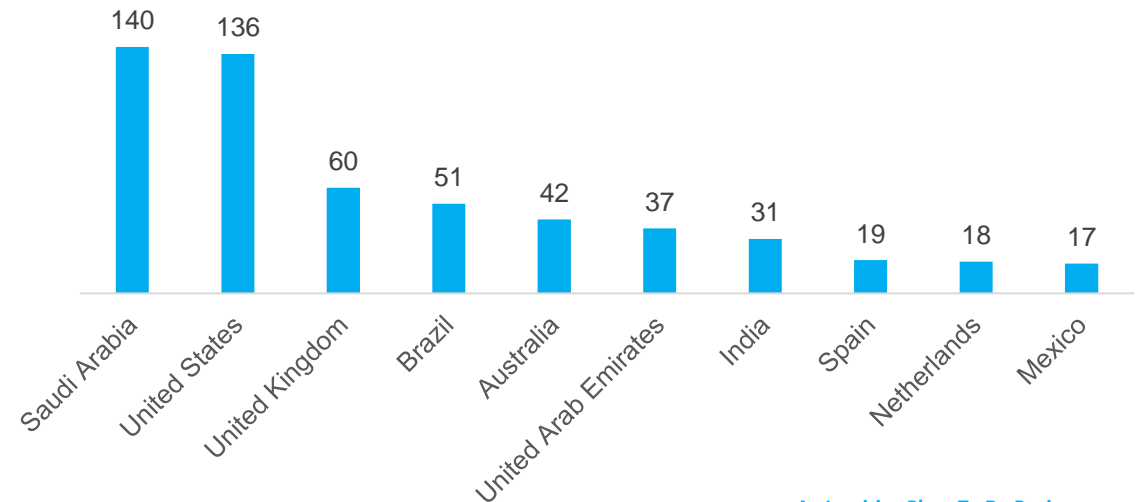
Sample Size, Jul 2023



Domestic Origin Municipality, Jul 2023



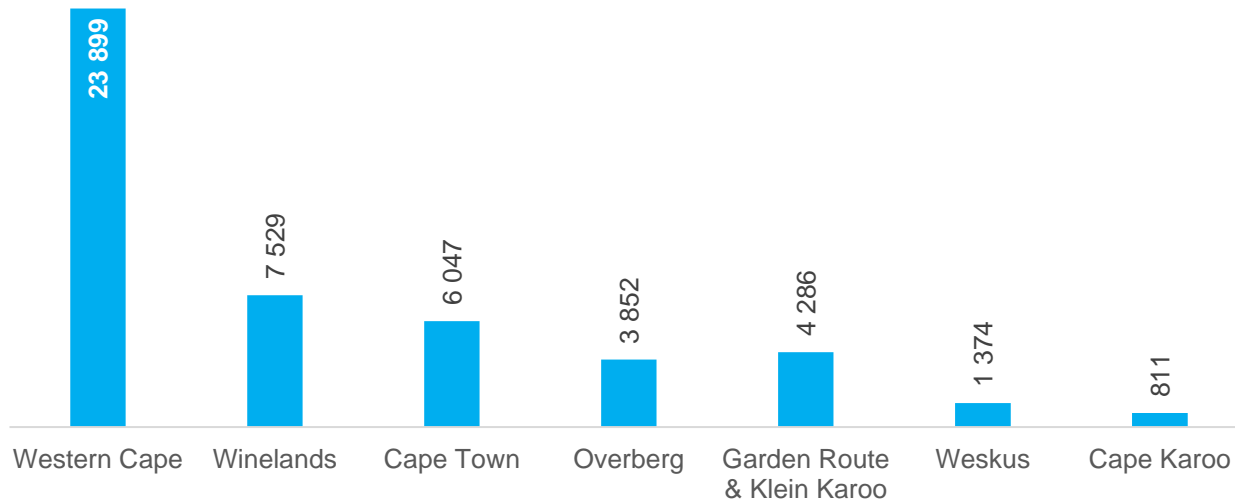
International Origin Country, Jul 2023



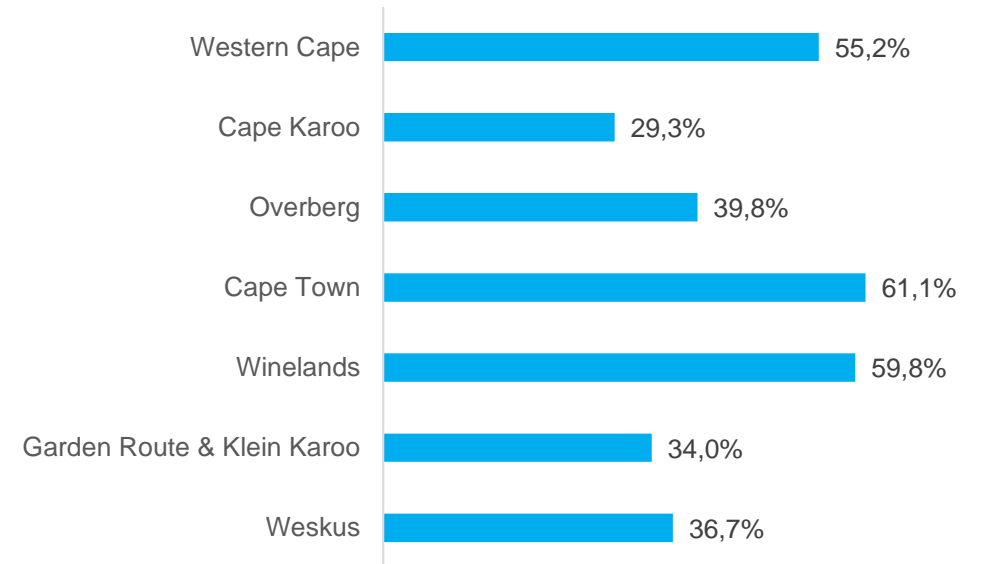
Mobile Insights: Domestic Visitor Trends

- In July 2023, the Western Cape received an average of **55.2%** repeat tourists.
- The **Winelands (31.5%)** and **Cape Town (25.3%)** saw the most domestic tourists in terms of volume of sample size and Cape Karoo (**3.4%**) the least.
- **Cape Town (61.1%)** was the most popular region for domestic repeat visits, followed by **Winelands (59.8%)**.

Domestic Sample Size, Jul 2023



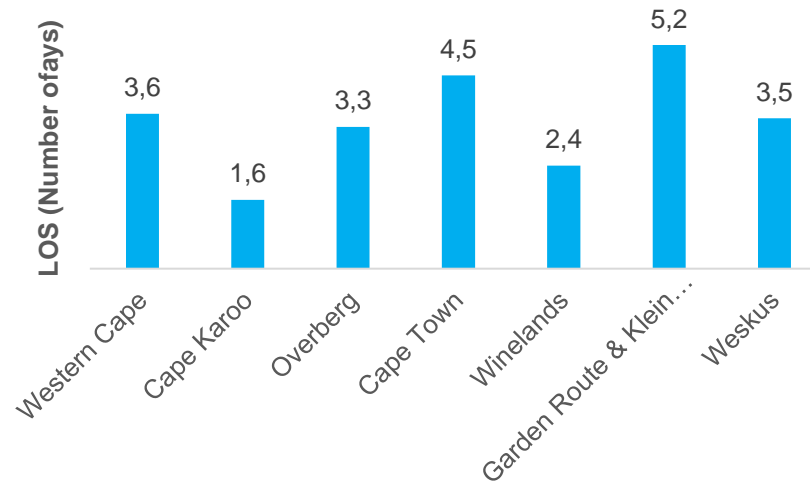
Domestic Repeat Visitors, Jul 2023



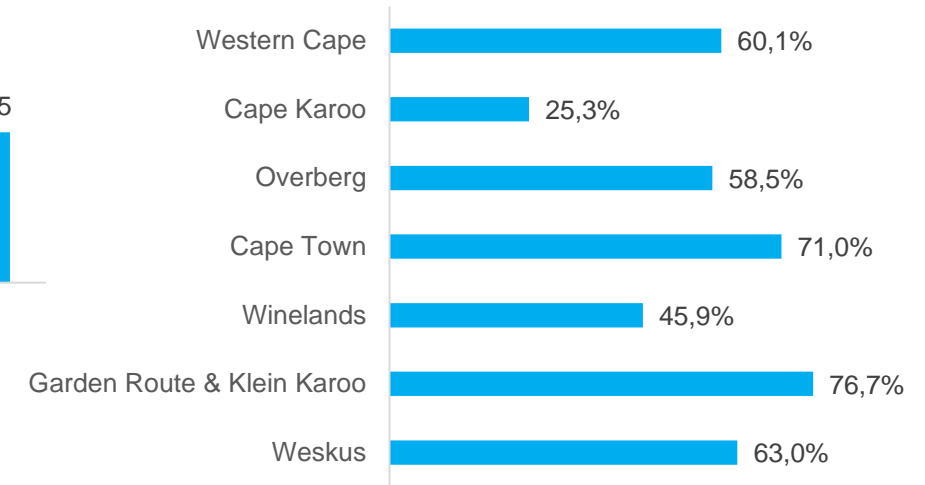
Mobile Insights: Domestic Visitor Trends

- On average, domestic tourists spent **the longest time in the Garden Route & Klein Karoo (5.2 days)** and Cape Town (4.5 days) during July 2023, and the shortest time in the Cape Karoo (**1.6 days**).
- Over 70% of sampled tourists** stayed overnight in the Garden Route & Klein Karoo and Cape Town (respectively).
- In contrast, domestic tourists to the Cape Karoo were more likely to stay for the day.

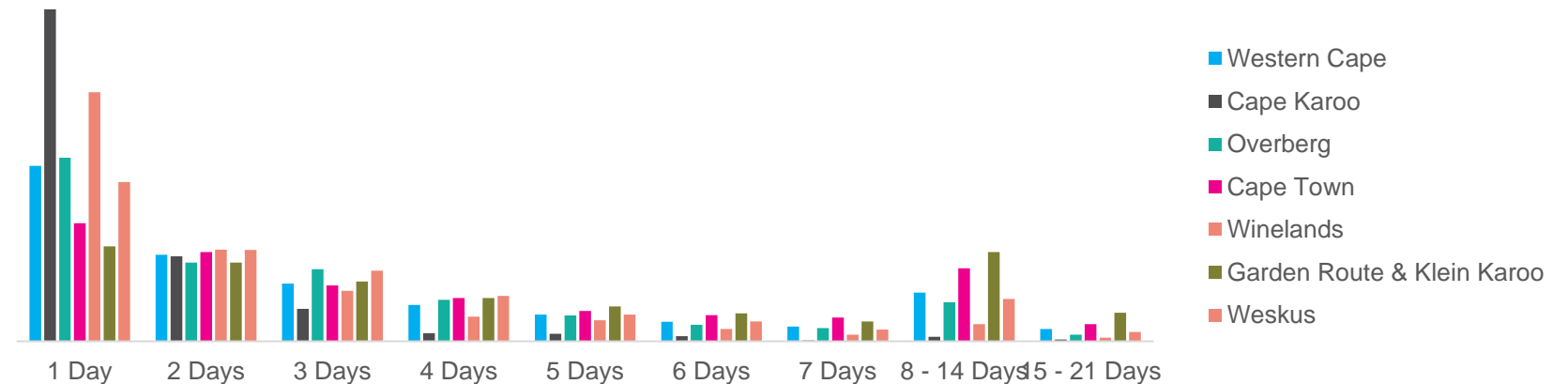
Average Length of Stay (LOS), Jul 2023



% Overnight Stays, Jul 2023



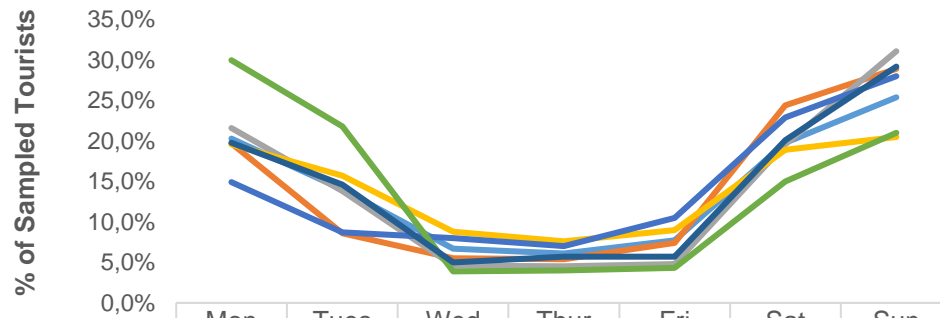
Average Length of Stay (Number of Days): Domestic, Jul 2023



Mobile Insights: Domestic Visitor Trends

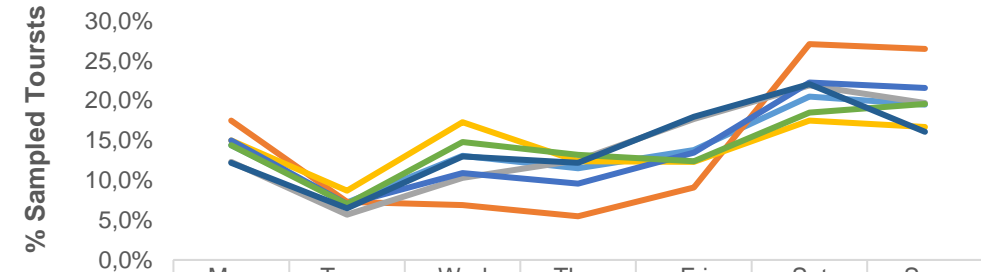
- Domestic tourists to the province were most likely to arrive on Saturday and depart on Sundays or Mondays. This trend was seen across almost all regions, pointing to the popularity of weekend stays in the province.
- In the **Winelands**, Saturday was the most popular arrival day and departure was most common on a Sunday.
- Tourists to the **Garden Route & Klein Karoo** generally arrived on Sunday and departed on a Monday.

Popular Departure Days of the Week: Domestic, Jul 2023



Western Cape	20,3%	14,0%	6,7%	6,1%	7,7%	19,8%	25,4%
Cape Karoo	19,7%	8,6%	5,5%	5,4%	7,4%	24,4%	28,9%
Overberg	21,6%	13,8%	4,6%	4,5%	4,8%	19,6%	31,1%
Cape Town	19,6%	15,7%	8,8%	7,6%	9,0%	18,9%	20,5%
Winelands	14,9%	8,7%	8,0%	7,0%	10,5%	22,9%	28,0%
Garden Route & Klein Karoo	30,0%	21,8%	3,9%	4,0%	4,3%	15,0%	21,0%
Weskus	19,8%	14,6%	5,0%	5,7%	5,7%	20,1%	29,2%

Popular Arrival Days of the Week: Domestic, Jul 2023



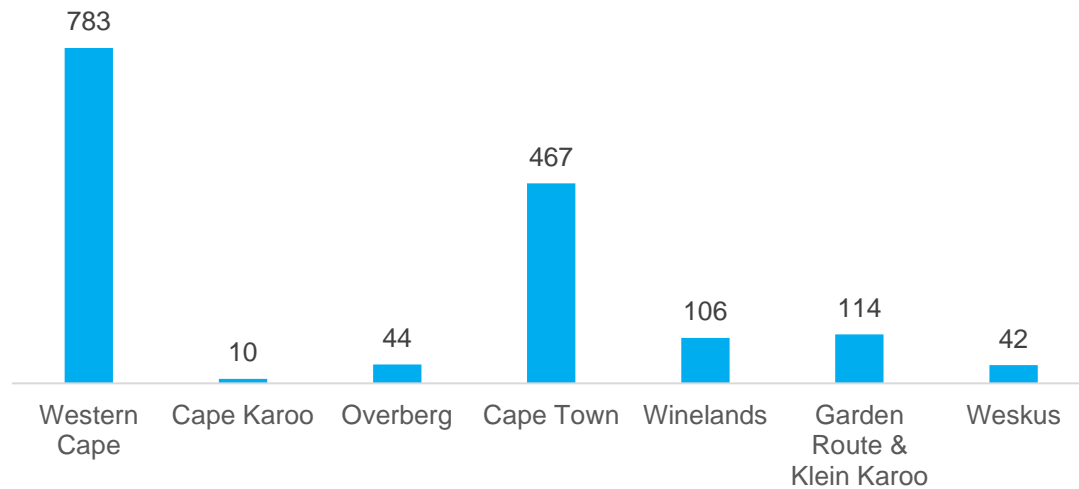
Western Cape	14,4%	7,2%	13,1%	11,5%	13,8%	20,5%	19,5%
Cape Karoo	17,5%	7,3%	6,9%	5,5%	9,1%	27,1%	26,5%
Overberg	12,3%	5,7%	10,3%	12,5%	17,7%	21,9%	19,7%
Cape Town	15,0%	8,7%	17,3%	12,4%	12,3%	17,5%	16,7%
Winelands	15,0%	7,0%	10,9%	9,6%	13,5%	22,3%	21,6%
Garden Route & Klein Karoo	14,4%	7,0%	14,8%	13,2%	12,4%	18,5%	19,6%
Weskus	12,2%	6,5%	13,0%	12,2%	18,0%	22,1%	16,1%

- In the **Cape Karoo**, which saw the majority of day visitors, Saturday was the most popular arrival day and Sunday was the departure day.
- Cape Town** arrival days were most common on a Friday and departure was most popular on a Sunday or Monday.
- Saturday was the most popular arrival day in the **Overberg** and Sunday was its most common departure day.
- In the **Weskus**, Saturday was the most popular arrival day and Sunday was the most popular day for departure.

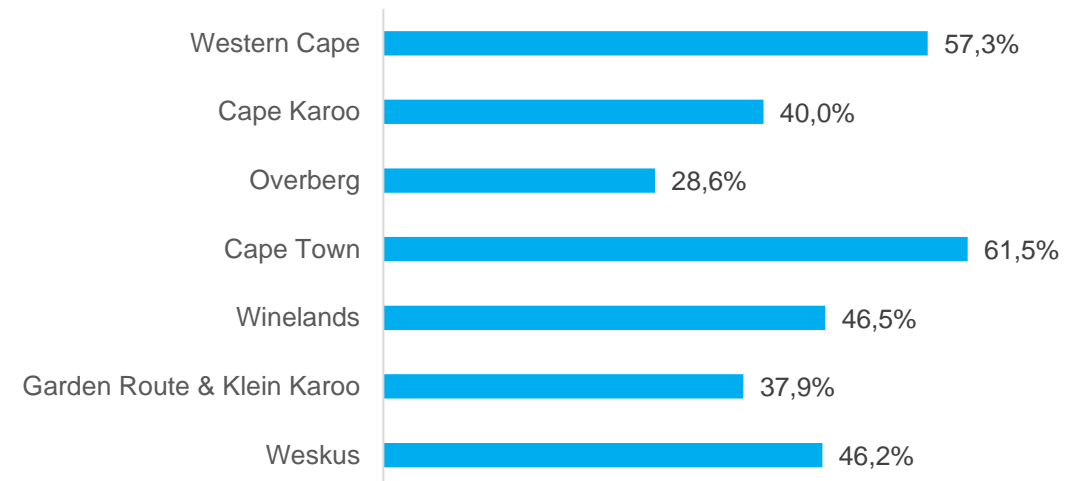
Mobile Insights: International Visitor Trends

- Nearly 60% of the sampled international tourists visited Cape Town followed by 14% who visited the Garden Route & Klein Karoo.
- Visitor trends for the Cape Karoo are based on a sample size of only 10 international tourists and therefore an accurate statistical representation of the region can not be represented.
- Cape Town (61.5%), Winelands (46.5%) and Weskus (46.2%) saw the most international repeat visitors in July 2023.

International Sample Size, Jul 2023

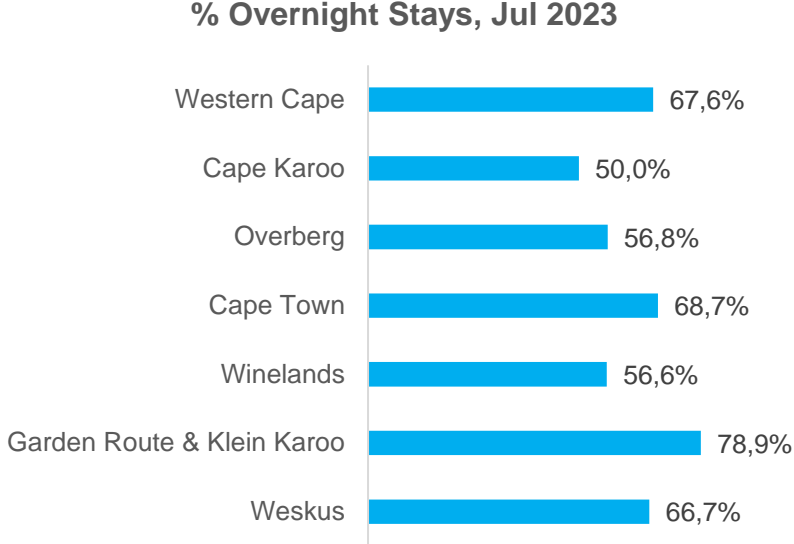
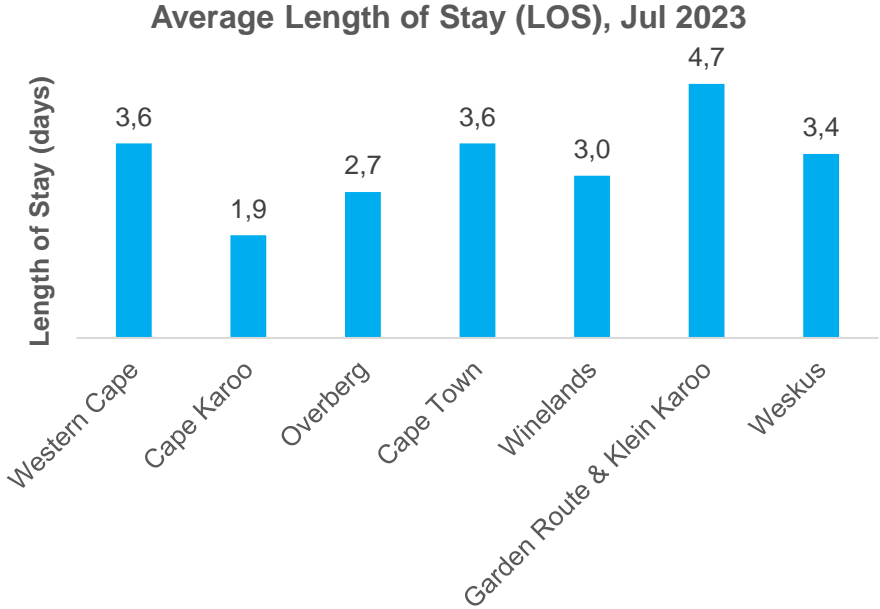


International Tourists Repeat Visits, Jul 2023

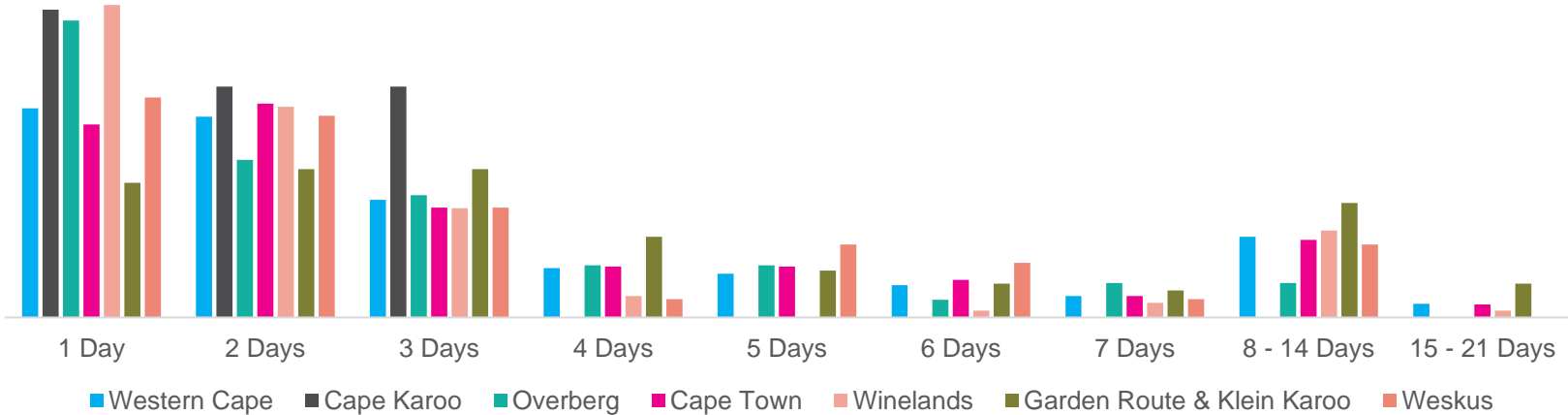


Mobile Insights: International Visitor Trends

- International tourists spent the longest time in the Garden Route & Klein Karoo (4.7 days) and Cape Town (3.6 days).
- Nearly 80% of sampled tourists stayed overnight in the Garden Route & Klein Karoo and close to 70% stayed overnight in Cape Town and Weskus.
- An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.



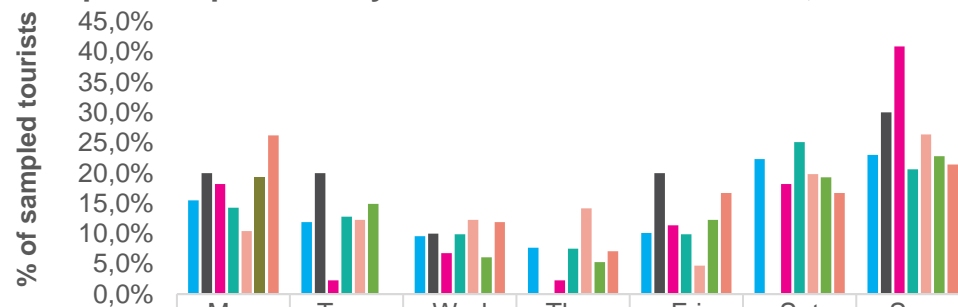
Average Length of Stay (Number of Days): International, Jul 2023



Mobile Insights: International Visitor Trends

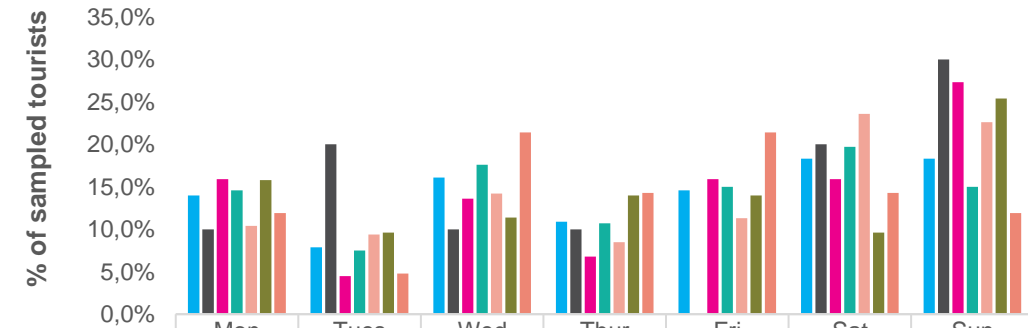
- During July 2023, international tourists to the province mainly arrived over the weekend on Saturdays or Sundays, while departures were mostly on Sundays.
- In **Cape Town**, a Wednesday or Saturday was common for arrival day and Saturday was the most common for departures.
- International tourists to the **Garden Route & Klein Karoo** arrived mostly on a Sunday and departed on the same day.

Popular Departure Days of the Week: International, Jul 2023



Western Cape	15,5%	11,9%	9,6%	7,7%	10,1%	22,3%	23,0%
Cape Karoo	20,0%	20,0%	10,0%	0,0%	20,0%	0,0%	30,0%
Overberg	18,2%	2,3%	6,8%	2,3%	11,4%	18,2%	40,9%
Cape Town	14,3%	12,8%	9,9%	7,5%	9,9%	25,1%	20,6%
Winelands	10,4%	12,3%	12,3%	14,2%	4,7%	19,8%	26,4%
Garden Route & Klein Karoo	19,3%	14,9%	6,1%	5,3%	12,3%	19,3%	22,8%
Weskus	26,2%	0,0%	11,9%	7,1%	16,7%	16,7%	21,4%

Popular Arrival Days of the Week: International, Jul 2023

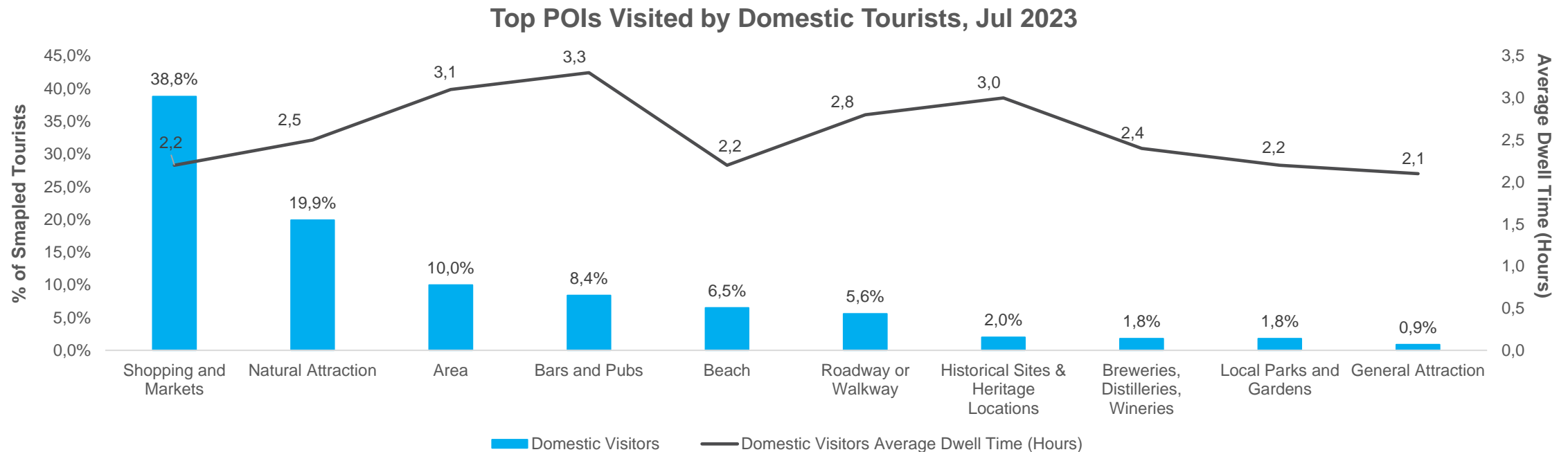


Western Cape	14,0%	7,9%	16,1%	10,9%	14,6%	18,3%	18,3%
Cape Karoo	10,0%	20,0%	10,0%	10,0%	0,0%	20,0%	30,0%
Overberg	15,9%	4,5%	13,6%	6,8%	15,9%	15,9%	27,3%
Cape Town	14,6%	7,5%	17,6%	10,7%	15,0%	19,7%	15,0%
Winelands	10,4%	9,4%	14,2%	8,5%	11,3%	23,6%	22,6%
Garden Route & Klein Karoo	15,8%	9,6%	11,4%	14,0%	14,0%	9,6%	25,4%
Weskus	11,9%	4,8%	21,4%	14,3%	21,4%	14,3%	11,9%

- The sampled tourists (10) in the **Cape Karoo**, arrived on either a Sunday, Tuesday, or Saturday and departed mostly on Sundays.
- For the **Winelands**, arrival days were most common on weekends (Saturday and Sunday), while departure was on a Sunday.
- Sunday was the most popular arrival and departure day in the Overberg.
- In the **Weskus region**, Wednesday or Friday were the arrival days and Sunday or Monday was the popular day of departure.

Points of Interest (POIs) Visited: Domestic Tourists

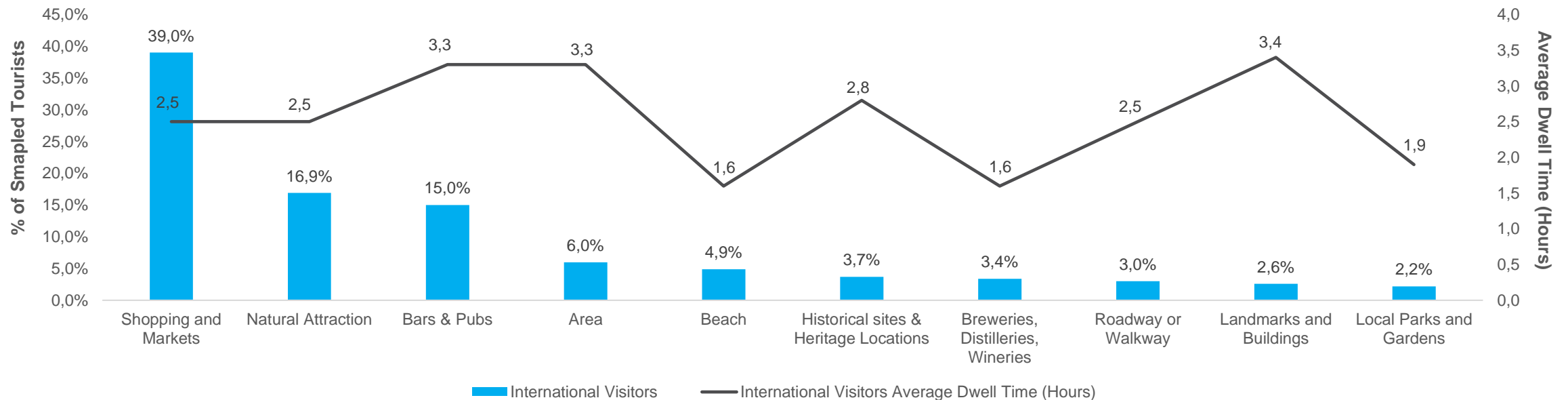
- Shopping and markets were the most popular type of attraction visited by domestic tourists with an average dwell time of 2.2 hours.
- Natural attractions ranked as the second most popular point of interest among domestic tourists.
- Spending time in areas like Cederberg Wilderness, Stanford Valley, Hemel-en-Aarde Valley and Van Dyk's Bay ranked third amongst the top POIs visited by domestic tourists, with an average dwell time of 3.1 hours.
- Bars and pubs were the fourth most popular point of interest and domestic tourists spent an average of 3.3 hours at the location.



Points of Interest (POIs) Visited: International Tourists

- Shopping and markets were the most popular type of attraction visited by international tourists and they shopped on average for 2.5 hours.
- Natural attractions, particularly Table Mountain, Cape Point and Knysna Waterfront ranked as the second most popular POI visited by international tourists.
- Bars and Pubs were the third most popular POI for international tourists who spent an average of 3.3 hours at the location.
- Among the top 10 POIs visited, international tourists spent the longest time exploring Landmarks and buildings (3.4 hours).

Top POIs Visited by International Tourist, Jul 2023



Mobile Tourists and Non-Tourists Definitions

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

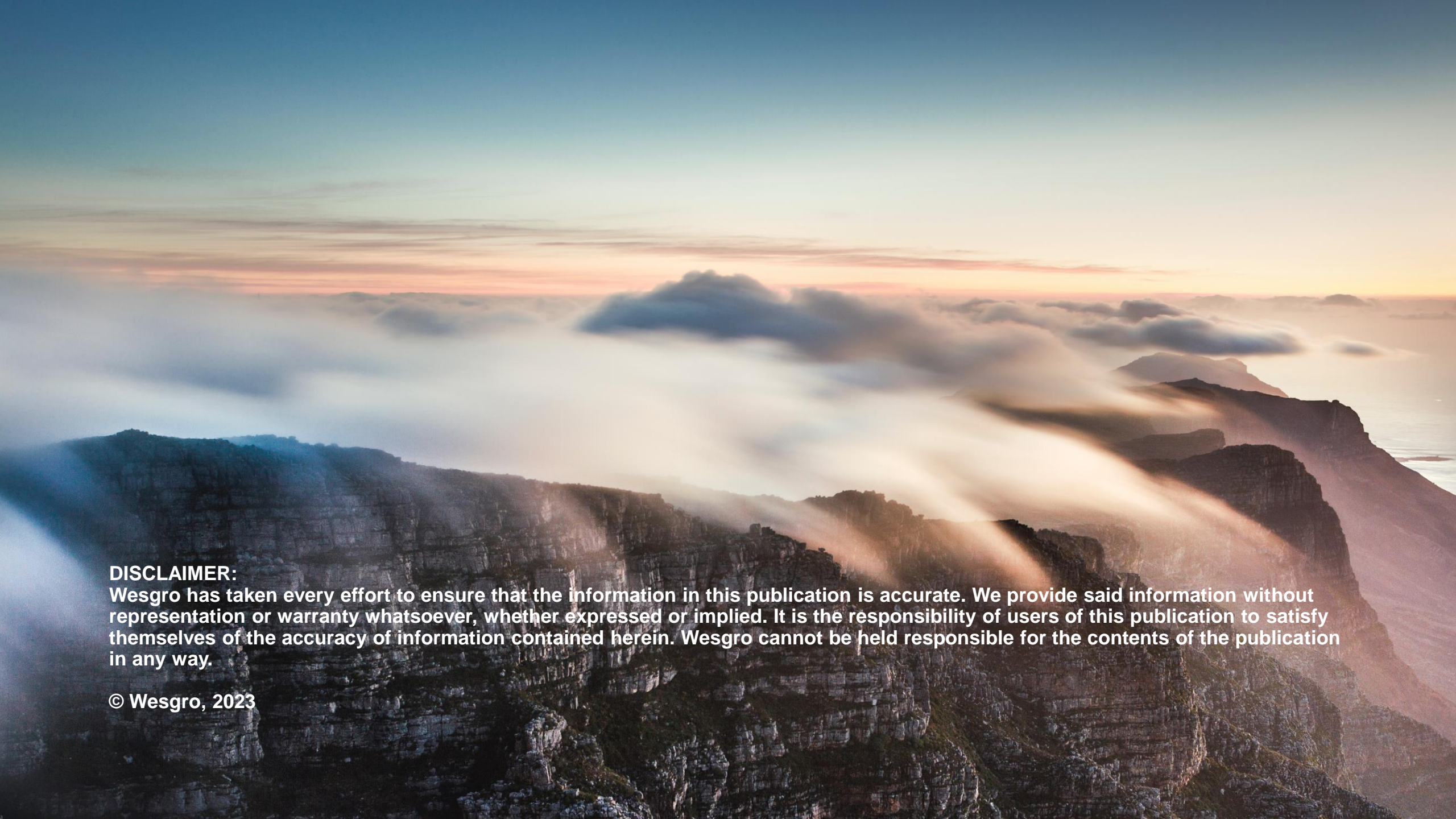
Source: Rove, 2023

Mobile Tourists and Non-Tourists Definitions

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

Glossary of Key Terms

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



DISCLAIMER:

Wesgro has taken every effort to ensure that the information in this publication is accurate. We provide said information without representation or warranty whatsoever, whether expressed or implied. It is the responsibility of users of this publication to satisfy themselves of the accuracy of information contained herein. Wesgro cannot be held responsible for the contents of the publication in any way.

© Wesgro, 2023