



Tourism Research Overview June 2023

Cape Town & the Western Cape

WESGRO

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

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Key Findings

The Western Cape's tourism sector continues to demonstrate strong recovery with the first six months of 2023 exceeding pre-pandemic levels in air arrivals to Cape Town. Key highlights of the overall tourism performance in June 2023 are outlined below:

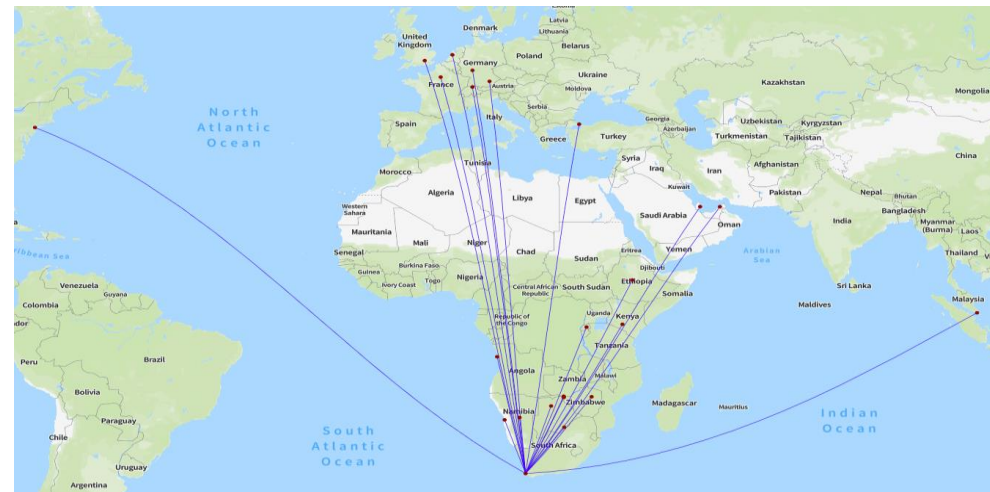
- International two-way passengers remained strong between Jan and Jun 2023, reaching 1.4 million, exceeding pre-pandemic levels by **104% and growing by 76% year-on-year**.
- **3.2 million domestic two-way passengers** passed through CTIA between Jan and Jun 2023, close to 80% recovery against 2019 and a y-o-y growth of 9%.
- George Airport two-way passengers reached 374,463 between Jan and Jun 2023, a 3% y-o-y increase vs. Jan - Jun 2022.
- Between Jan and Jun 2023, Cape Town recorded a total of 446,703 tourist arrivals via air, of which 90% originated from overseas markets and 10% from the African continent. Into the first six months of 2023, total air arrivals (**103% recovery**) into Cape Town as well as overseas air arrivals (**104% recovery**) reached full recovery against the same period in 2019.
- **UK led as the top source market to Cape Town (via air)** between Jan and Jun 2023, closely followed by USA, 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 Jan and Jun 2023 reflected full recovery from 6 out of the top 10 source markets to Cape Town (via air), against the same period in 2019 (Jan-Jun). These markets included UK (103%), USA (146%), Germany (106%), Netherlands (115%), Canada (104%) and Zimbabwe (174%). In addition, Italy (98% recovery) is rapidly nearing full recovery over 2019 and Switzerland and India are standing at well over 80% recovery.
- Footfall to 24 participating attractions across the six regions of the Western Cape recorded a total of 271,653 visitors in June 2023, a 16% year-on-year growth in the number of visitors when compared to June 2022 and 65% of what it was in June 2019.
- The top 5 highest year on year growth rates in June 2023 were recorded for Cape Agulhas Lighthouse (92%), Table Mountain National Park: Boulders (61%), Bontebok National Park (60%), Cango Caves (42%) and Table Mountain National Park: Cape of Good Hope (36%).

International passenger recovery between Jan and Jun 2023 continues to exceed pre-pandemic levels

- International two-way passengers remained strong between Jan and Jun 2023, reaching **104% recovery** against the same period in 2019 and a **76% year-on-year growth** compared to Jan – Jun 2022.

Year/Month	2019	2020	2021	2022	2023 ytd	2023					
						Jan	Feb	Mar	Apr	May	Jun
Two-way passengers	2 606 398	810 811	525 441	1 895 975	1 379 157	280 430	258 970	272 955	218 325	175 079	173 398
YoY growth percentage*	1%	-69%	-35%	261%	76%	186%	106%	70%	39%	46%	39%

Operating carriers



Domestic passengers close to 80% recovery between Jan and Jun 2023

Year/Month	2019	2020	2021	2022	2023 ytd	2023 month					
						Jan	Feb	Mar	Apr	May	Jun
Two-way passengers	8 363 307	3 167 542	4 221 365	5 960 826	3 227 633	515 017	507 787	577 855	574 528	548 762	503 684
YoY growth percentage*	2%	-62%	33%	41%	9%	-11%	10%	-12%	7%	9%	24%

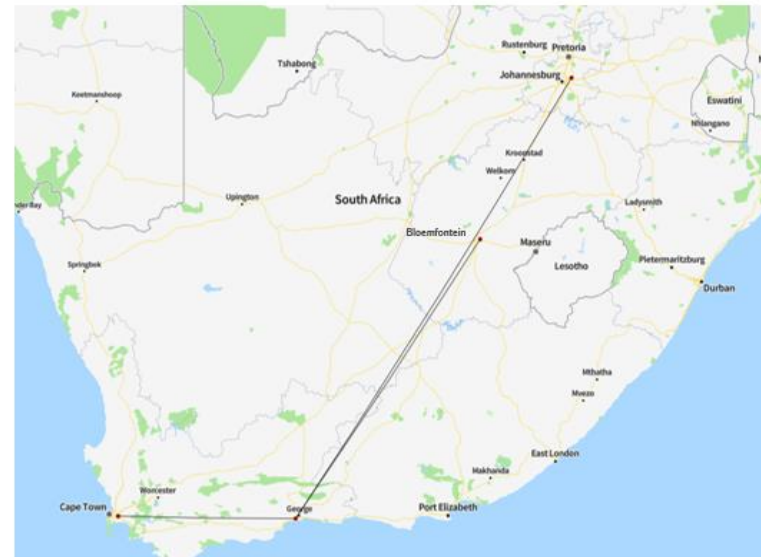
Operating carriers



George Airport two-way passengers reached 374,463 between Jan and Jun 2023, a 3% y-o-y increase vs. Jan - Jun 2022

Year/Month	2019	2020	2021	2022	2023 ytd	2023 month					
						Jan	Feb	Mar	Apr	May	Jun
Two-way passengers	832 981	340 438	536 886	740 990	374 463	63 673	59 747	70 062	70 165	63 532	58 312
YoY growth percentage*	0%	-59%	56%	39%	3%	10%	10%	-3%	-4%	3%	4%

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



Remarkable Growth for Cape Town's African Network between 2015 and 2023

Since 2015, Nine new destinations added

- Addis Ababa, Harare, Victoria Falls, Luanda, Maun, Maputo, Livingstone, Kigali, Nairobi.
- June 2023 - Eswatini #10 + July Lusaka #11



- Started 2015 – 3 flights per week, now daily



- Since 2015 – 5 new routes: Harare, Victoria Falls, Maun, Walvis Bay and Maputo



- Started in 2015 - 3 flights per week via Gaborone B737
From 26 March 2023 – 11 direct non-stop flights per week on A350-900



- Started in 2016 – 3 flights per week NBO-LVI-CPT on E190
From January 2023 – Daily flights; 2 non-stop on B787-8, 5 on E190 with stops in LVI and VFA



- Started in 2018 – 3 flights per week KGL-HRE-CPT on CRJ-900
From December 2022 – 6 flights per week on B737-800 with intention to further expand

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

Between January and June 2023, Cape Town recorded a total of **446,703 tourist arrivals via air**, of which 90% originated from overseas markets and 10% from the African continent. Into the first six months of 2023 total air arrivals (**103% recovery**) into Cape Town as well as overseas air arrivals (**104% recovery**) reached full recovery against the same period in 2019.

TOURIST ARRIVALS TO SOUTH AFRICA BY AIRPORT, JAN-JUN 2023

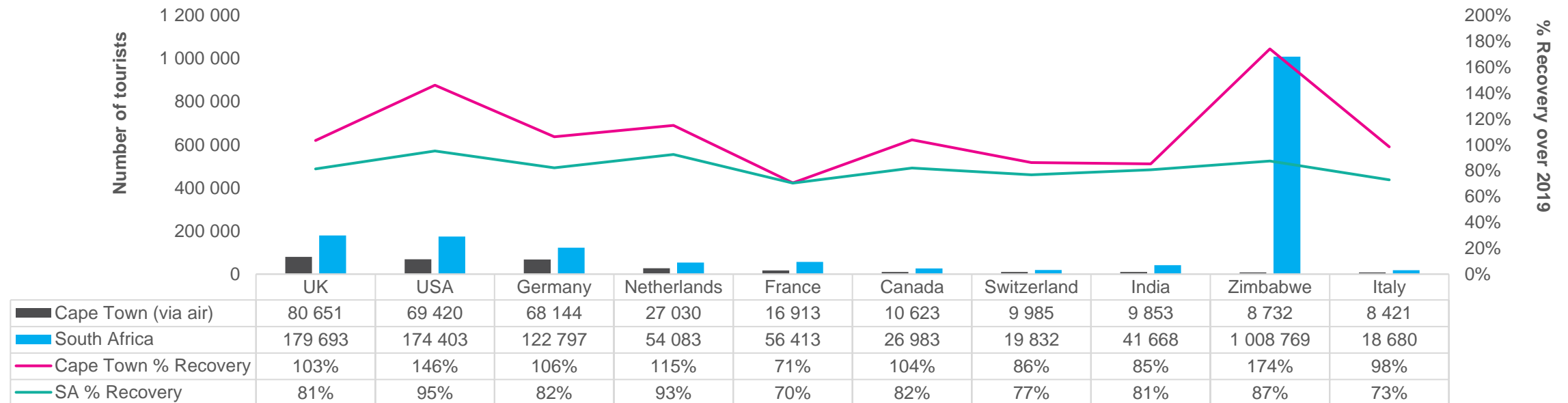
	Cape Town	OR Tambo	King Shaka
Overseas Tourist Arrivals	402,989	488,949	13,924
Africa Tourist Arrivals	43,080	220,572	2,224
Total Tourist Arrivals	446,703	713,416	16,160

Source: StatsSA, 2023

Top Markets to Cape Town (via air): YTD June 2023

- **UK led as the top source market to Cape Town (via air)** between January and June 2023, closely followed by USA, 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 June 2023 reflected full recovery from **6 out of the top 10 source markets to Cape Town (via air)**, against the same period in 2019 (Jan-Jun). These markets included UK (103%), USA (146%), Germany (106%), Netherlands (115%), Canada (104%) and Zimbabwe (174%). In addition, Italy (98% recovery) is rapidly nearing full recovery over 2019 and Switzerland and India are well over 80%.

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

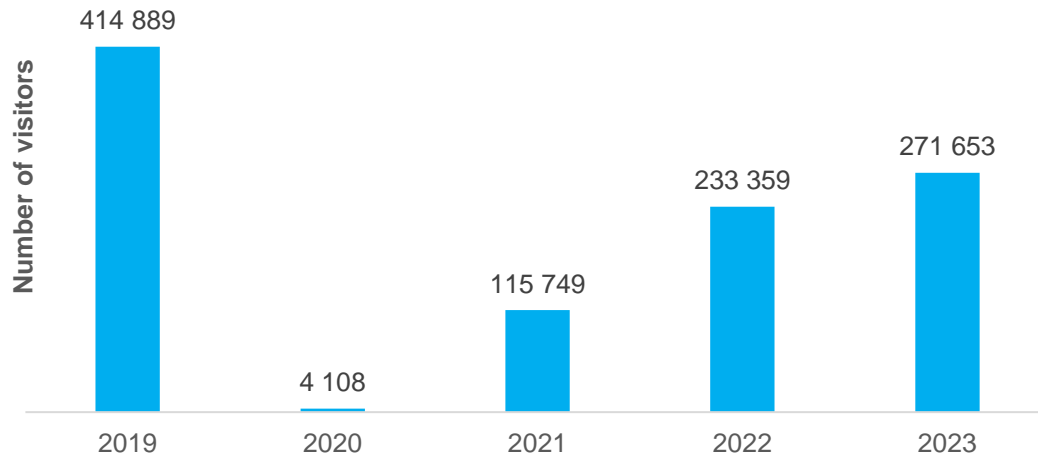


Source: StatsSA, 2023

Western Cape Attractions

- Footfall to 24 participating attractions across the six regions of the Western Cape recorded a total of 271,653 visitors in June 2023, a **16% growth in the number of visitors** when compared to June 2022 and **65% of what it was in June 2019**.
- The top 5 highest year-on-year growth rates in June 2023 were recorded for Cape Agulhas Lighthouse (92%), Table Mountain National Park: Boulders (61%), Bontebok National Park (60%), Cango Caves (42%) and Table Mountain National Park: Cape of Good Hope (36%).

VISITORS TO PARTICIPATING WESTERN CAPE ATTRACTIONS, JUNE 2019-2023



*No visitors were recorded during April 2020 due the Covid-19 nationwide lockdown.

Western Cape Attractions	Jun 2022/2023 % Change	Jun 2019/2023 % Recovery
Cape Town		
Table Mountain Aerial Cableway	-3%	57%
Table Mountain National Park	16%	67%
Table Mountain National Park: Boulders	61%	84%
Table Mountain National Park: Cape of Good Hope	36%	73%
Overberg		
Agulhas National Park	-43%	23%
Bontebok National Park	60%	80%
Cape Agulhas Lighthouse	92%	67%
De Hoop Nature Reserve	-30%	135%
De Mond Nature Reserve	-65%	22%
Harold Porter National Botanical Garden	-53%	36%
Kogelberg Nature Reserve	-49%	104%
Stony Point	-100%	0%
Shipwreck Museum	-73%	18%
Panthera Africa	-40%	33%
Garden Route & Klein Karoo		
Cango Caves	42%	71%
Tsitsikamma National Park	18%	68%
Wilderness National Park	-4%	61%
Weskus		
Knysna National Park	-6%	70%
West Coast National Park	-32%	29%
!Khwa ttu	24%	100%
Winelands		
Protea Tractor Trip	-52%	55%
Birds Paradise	-27%	27%
Viljoensdrift River Cruise	-94%	4%
Cape Karoo		
Karoo National Park	1%	64%

Sources: LTO's, and Attractions, 2023

Visitor Trends Mobile Location Data Insights

Western Cape Mobile Location Data Insights

What is mobile location data?

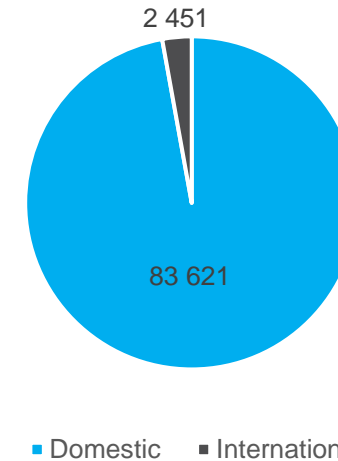
- Geo or spatial data from smartphones. When a user installs an app, they are often asked to share their location data with the company which provides the app, and other companies who are partners with the app publisher.
- Users can “opt in” to location sharing (or choose not to “opt in”). When they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

Why use mobile location data insights?

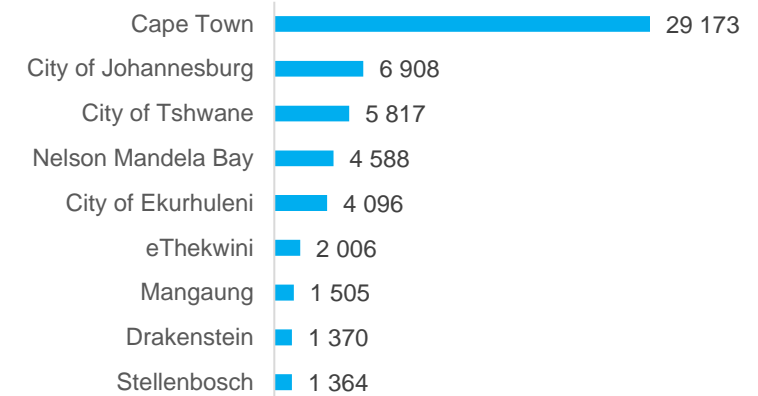
- Mobile location-based data offers a more granular lens on visitor behaviour and provides a much larger sample size.
- These insights aim to facilitate a better understanding of visitor movement throughout the Western Cape’s six region.
- Mobile location data serves as a sample. It is not 100% of visitors,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

The insights in this report represent mobile location data from a sample of **83,621 domestic** and **2,452 international** tourists who visited the Western Cape in June 2023. Within the domestic data set, **26,173** of the sampled tourists were from Cape Town and from the international sampled tourists, **596** were from the United States.

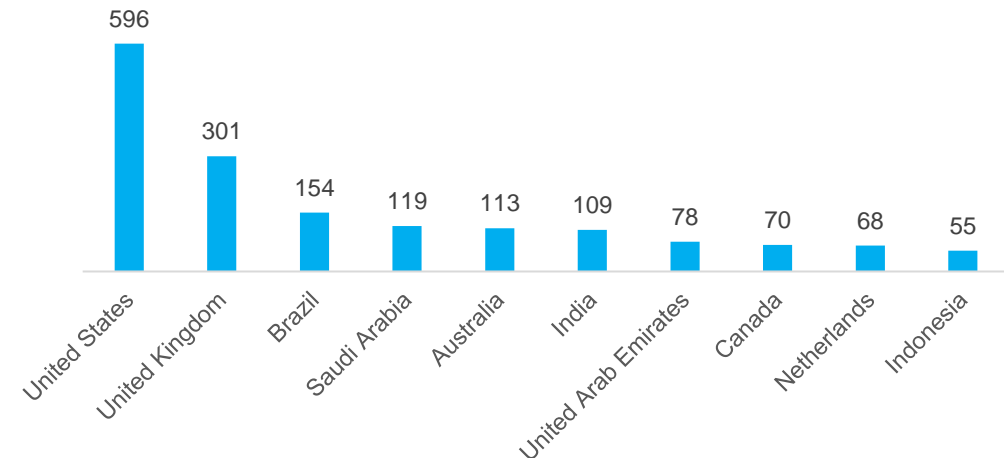
Sample Size, Jun 2023



Domestic Origin Municipality, Jun 2023



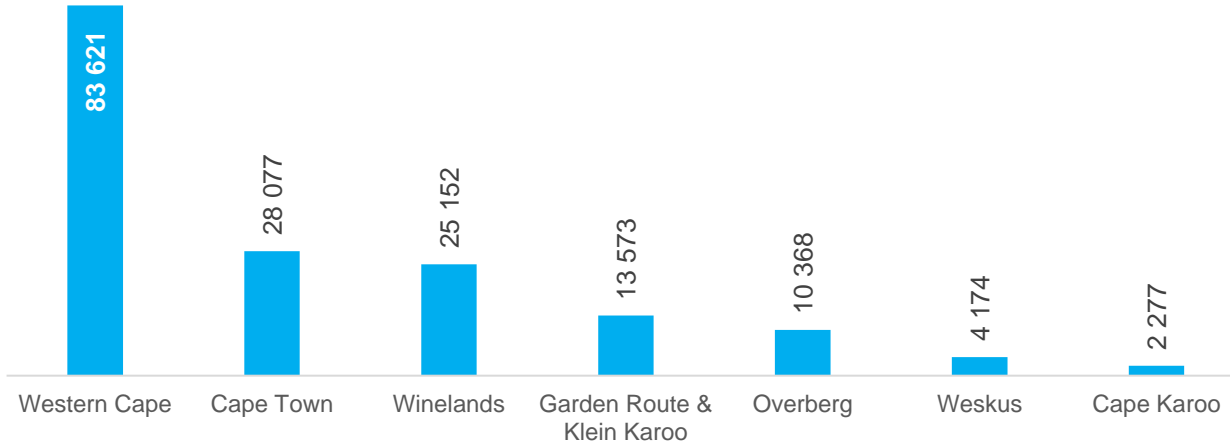
International Origin Country, Jun 2023



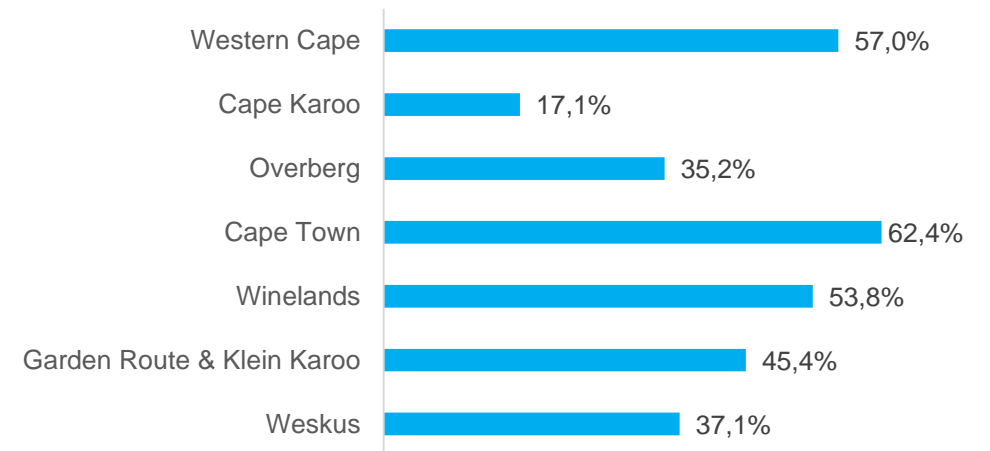
Mobile Insights: Domestic Visitor Trends

- In June 2023, **Cape Town (33.6%)** and **Winelands (30.1%)** saw the most domestic tourists in terms of volume of sample size and Cape Karoo (2.7%) the least.
- **Cape Town (62.4%)** and **Winelands (53.8%)** was the most popular regions for domestic repeat visits during the month of June.

Domestic Sample Size, Jun 2023



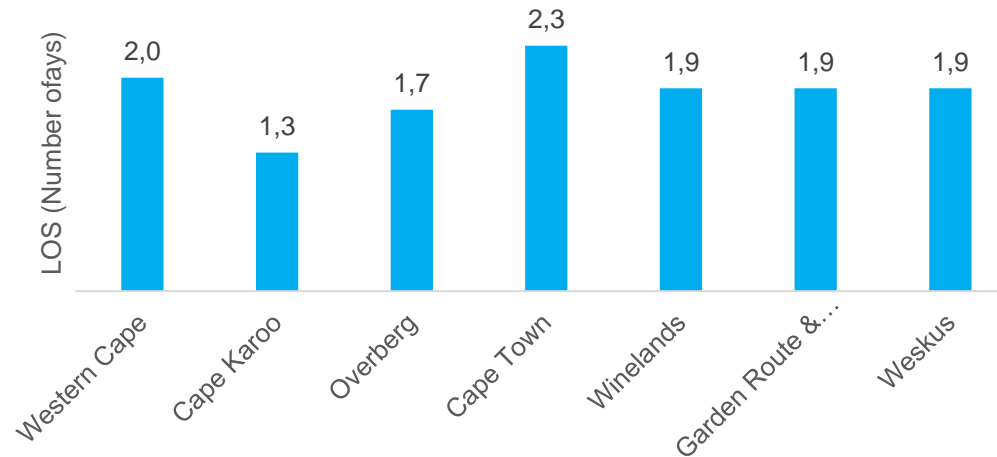
Domestic Repeat Visitors, Jun 2023



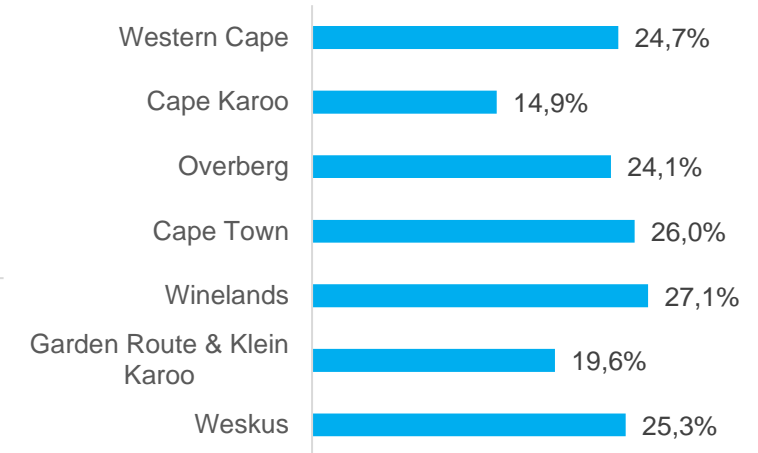
Mobile Insights: Domestic Visitor Trends

- On average, domestic tourists spent the longest time in the **Cape Town (2.3)**, **Winelands, Weskus** and **Garden Route & Klein Karoo (1.9)** respectively).
- Close to 30% of sampled tourists** stayed overnight in the Winelands and 26% in Cape Town.
- In contrast, domestic tourists to the Cape Karoo were more likely to stay for the day.

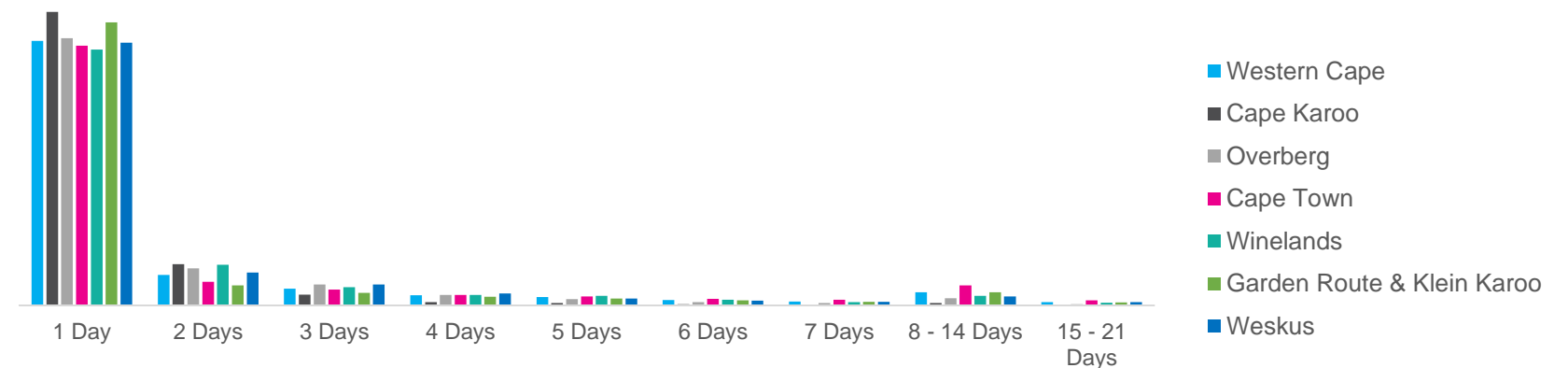
Average Length of Stay (LOS), Jun 2023



% Overnight Stays, Jun 2023



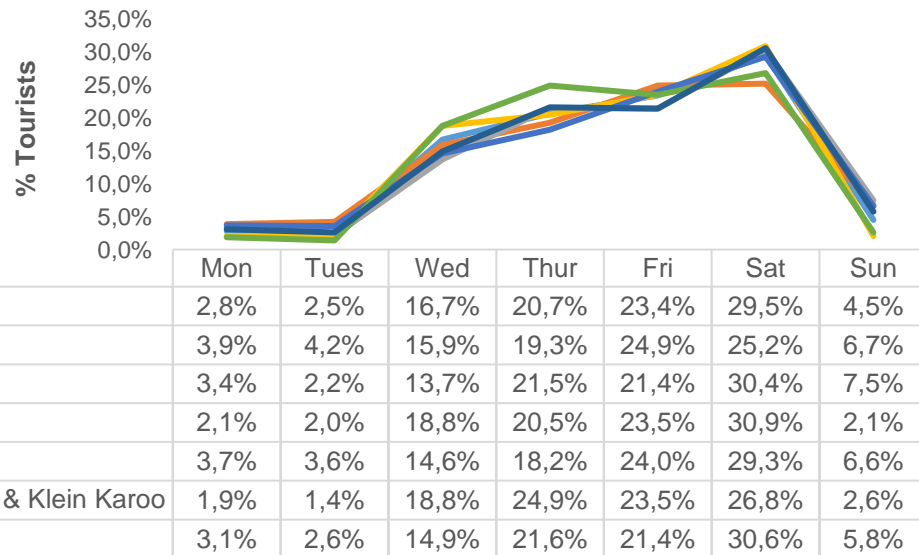
Average Length of Stay (Number of Days): Domestic, Jun 2023



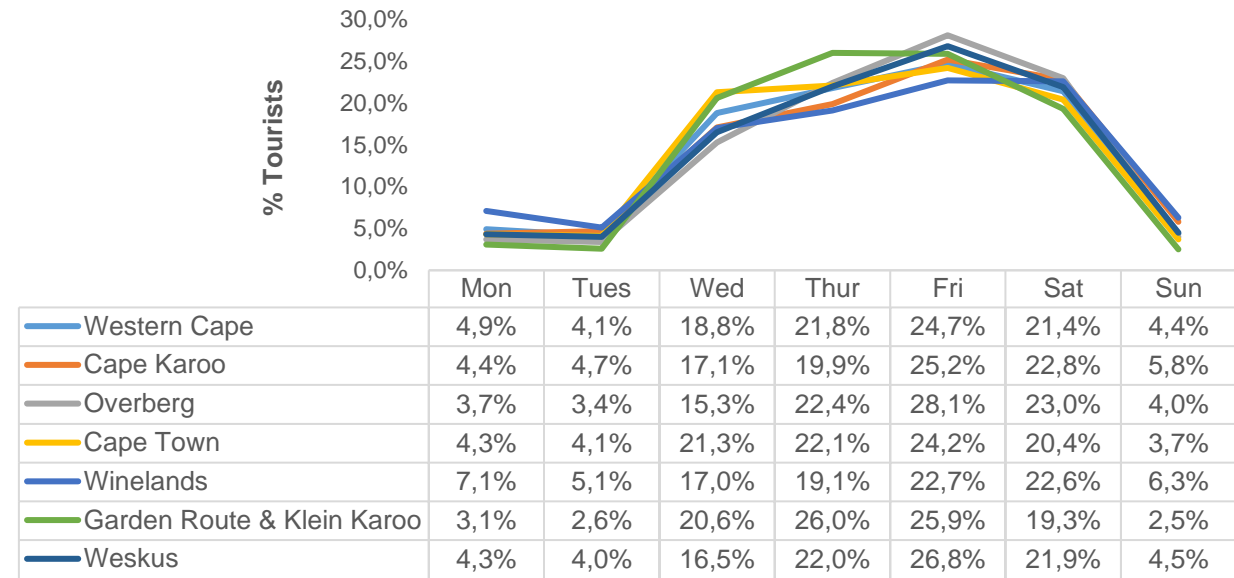
Mobile Insights: Domestic Visitor Trends

- Domestic tourists to the province were most likely to arrive on a Friday and depart on a Sunday. This trend was also seen in the Overberg, Weskus and Garden Route & Klein Karoo regions, pointing to the popularity in weekend stays in the province.
- In Garden Route & Klein Karoo, Thursday was the most popular arrival day and departure was Saturday.
- In the Winelands, Friday was the most popular arrival day and departure was most common on a Saturday.
- Tourists to the Garden Route & Klein Karoo generally arrived on a Thursday and departed on a Saturday.

Popular Departure Days of the Week: Domestic, Jun 2023



Popular Arrival Days of the Week: Domestic, Jun 2023

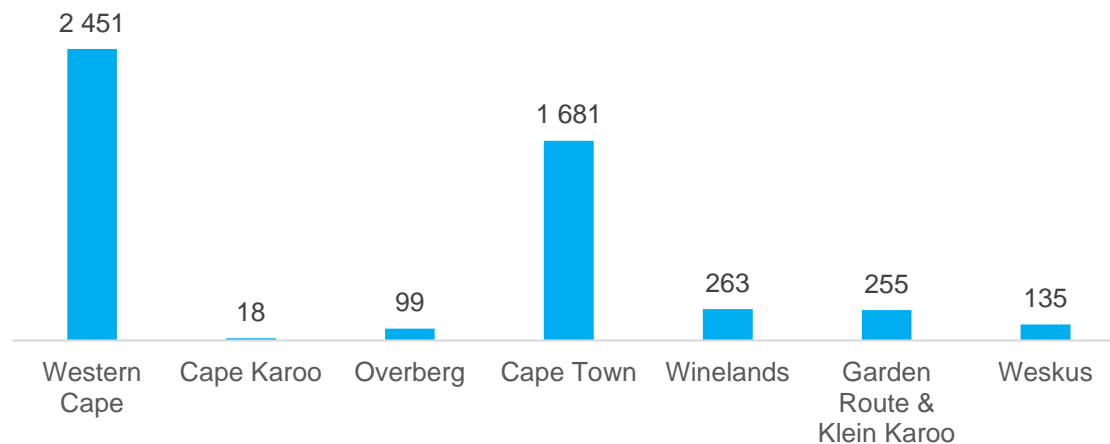


- In the Cape Karoo, which saw majority overnight visitors with Friday being most common day of arrival and Saturday was the most popular arrival and departure day amongst tourists.
- Cape Town arrival day were most common on a Friday and departure was most popular on a Saturday.
- Friday was the most popular arrival day in the Overberg and Saturday was its most common departure day.
- In the Weskus, Friday was the most popular arrival day and Saturday the most popular day for departure.

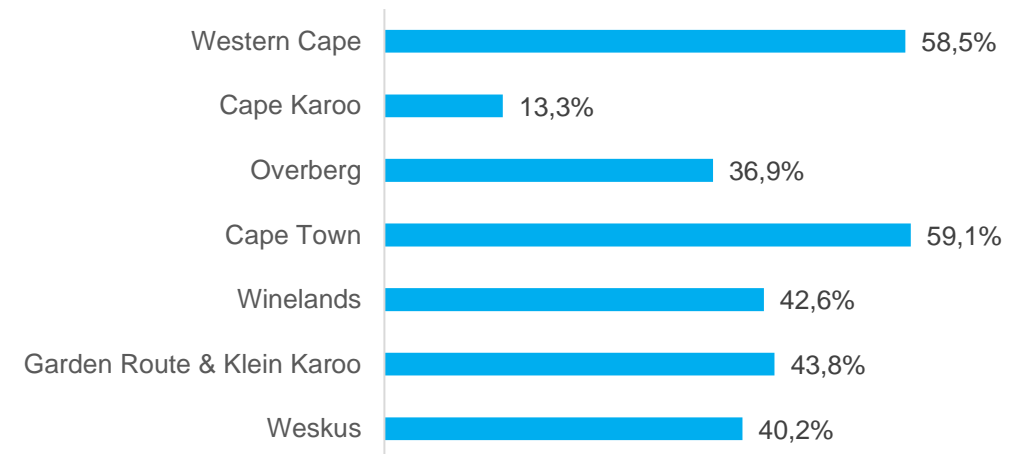
Mobile Insights: International Visitor Trends

- **Nearly 70%** of the sampled international tourists visited Cape Town followed by 11% who visited the Winelands.
- Visitor trends for the Cape Karoo is based on a sample size of only 18 international tourists and therefore does not provide an accurate statistical representation for the region.
- Cape Town (59.1%) and Garden Route & Klein Karoo (43.8%) saw the most international repeat visitors in June 2023.

International Sample Size, Jun 2023



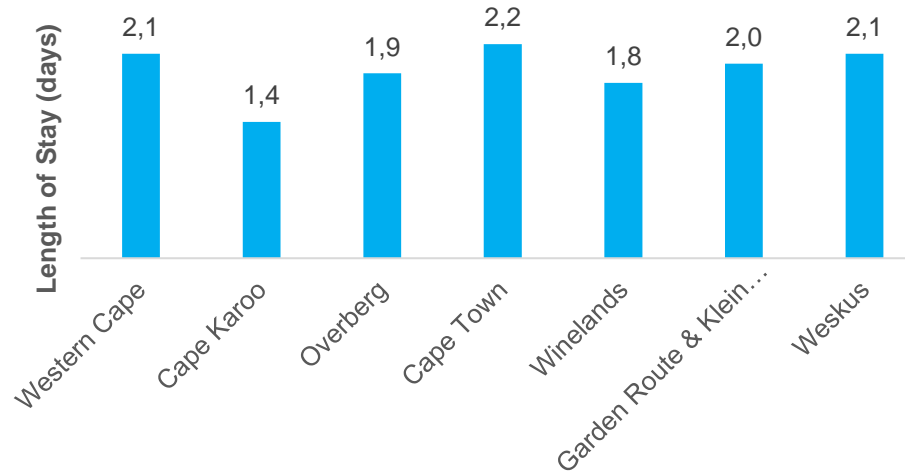
International Tourists Repeat Visits, Jun 2023



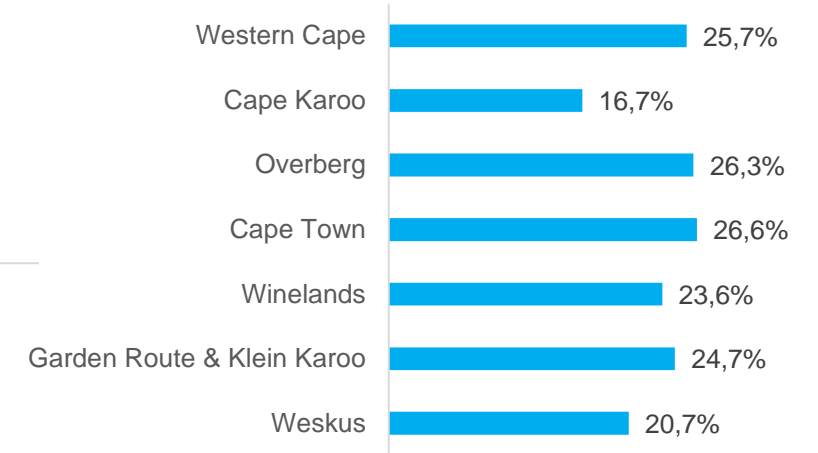
Mobile Insights: International Visitor Trends

- International tourists spent the longest time in Cape Town (2.2 days) and Weskus (2.1 days).
- Nearly 30% of sampled tourists stayed overnight in Cape Town and Overberg and nearly 25% in the Winelands and Garden Route & Klein Karoo regions.
- An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.

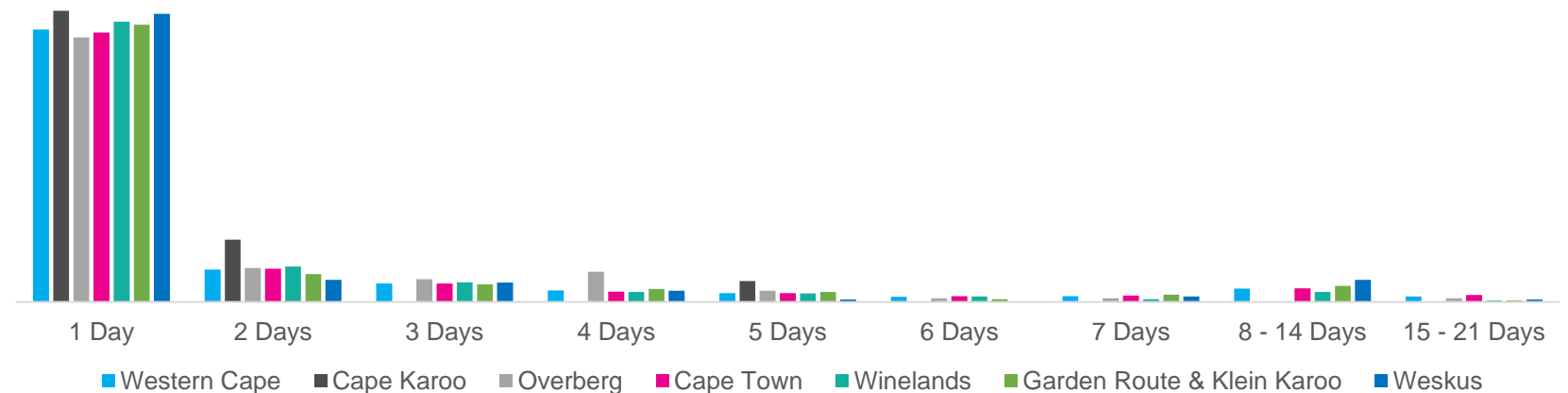
Average Length of Stay (LOS), Jun 2023



% Overnight Stays, Jun 2023



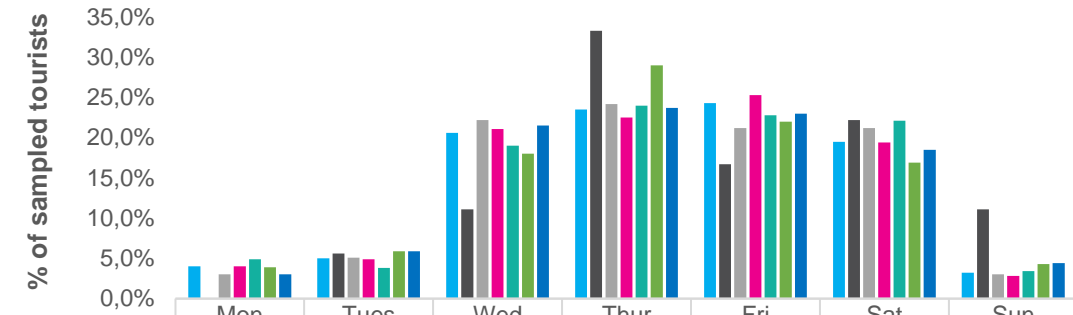
Average Length of Stay (Number of Days): International, Jun 2023



Mobile Insights: International Visitor Trends

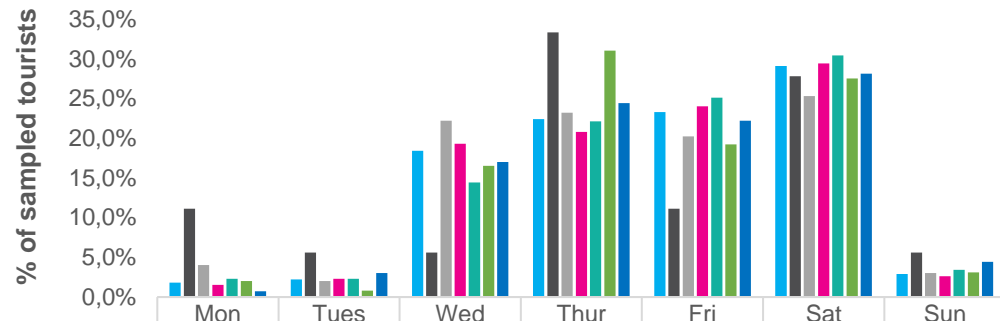
- During June 2023, international tourists to the province mainly arrived on a Thursday, while departures were mostly on a Saturday.
- In **Cape Town**, a Thursday or Friday was the most popular arrival days and Saturday the most common for departures.
- International tourists to the **Winelands** arrived mostly on a Thursday or Friday and departed on a Saturday.

Popular Arrival Days of the Week: International, Jun 2023



	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Western Cape	4,0%	5,0%	20,6%	23,5%	24,3%	19,5%	3,2%
Cape Karoo	0,0%	5,6%	11,1%	33,3%	16,7%	22,2%	11,1%
Overberg	3,0%	5,1%	22,2%	24,2%	21,2%	21,2%	3,0%
Cape Town	4,0%	4,9%	21,1%	22,5%	25,3%	19,4%	2,8%
Winelands	4,9%	3,8%	19,0%	24,0%	22,8%	22,1%	3,4%
Garden Route & Klein Karoo	3,9%	5,9%	18,0%	29,0%	22,0%	16,9%	4,3%
Weskus	3,0%	5,9%	21,5%	23,7%	23,0%	18,5%	4,4%

Popular Departure Days of the Week: International, Jun 2023

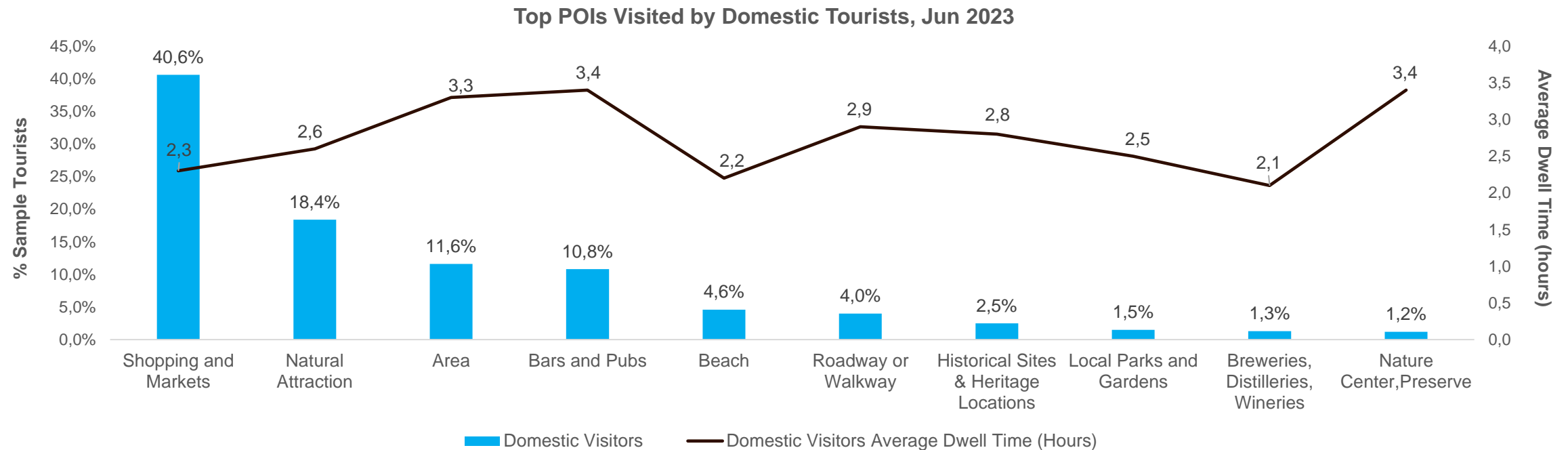


	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Western Cape	1,8%	2,2%	18,4%	22,4%	23,3%	29,1%	2,9%
Cape Karoo	11,1%	5,6%	5,6%	33,3%	11,1%	27,8%	5,6%
Overberg	4,0%	2,0%	22,2%	23,2%	20,2%	25,3%	3,0%
Cape Town	1,5%	2,3%	19,3%	20,8%	24,0%	29,4%	2,6%
Winelands	2,3%	2,3%	14,4%	22,1%	25,1%	30,4%	3,4%
Garden Route & Klein Karoo	2,0%	0,8%	16,5%	31,0%	19,2%	27,5%	3,1%
Weskus	0,7%	3,0%	17,0%	24,4%	22,2%	28,1%	4,4%

- The sampled tourists (17) in the **Cape Karoo**, arrived on a Thursday and departed mostly on Thursday.
- **Garden Route & Klein Karoo** arrival day was most common on a Thursday and departures were on a Thursday.
- Thursday was the most popular arrival day, and departure days in **Weskus** was mostly on a Saturday.
- In the **Overberg**, Thursday was popular for arrival days and Saturday for departures.

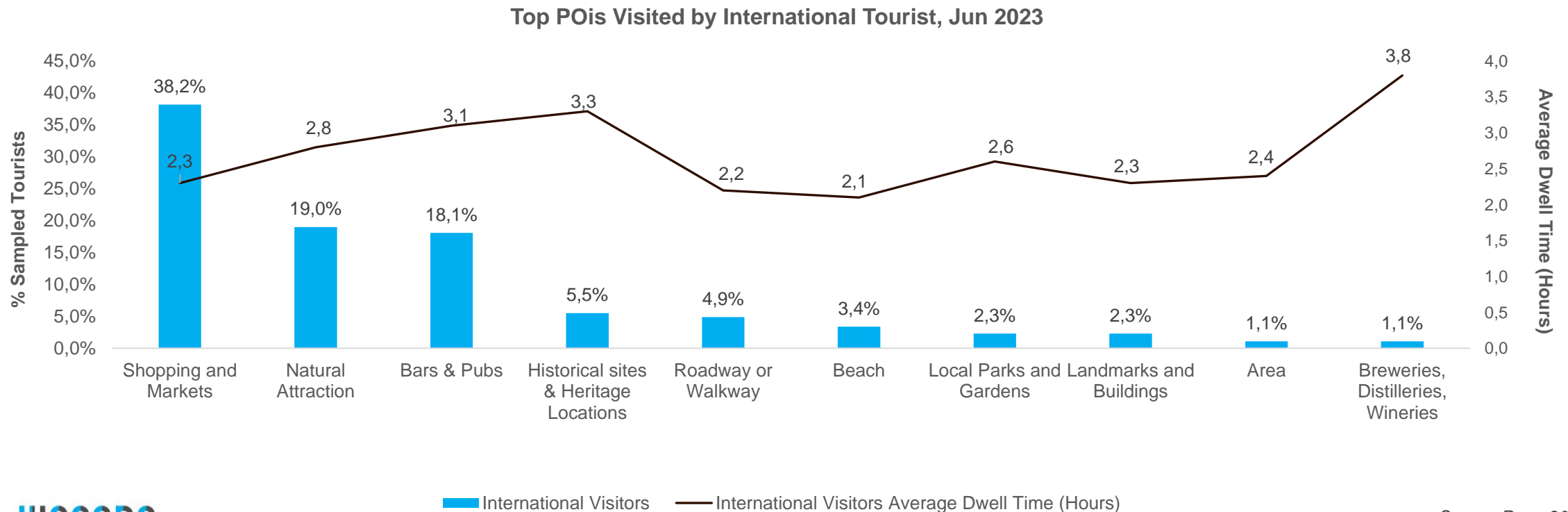
Points of Interest (POIs) Visited: Domestic Tourists

- Shopping and markets was the most popular type of attraction visited by domestic tourists with an average dwell time of 2.3 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 3.3 hours.
- Bars & Pubs were the fourth most popular point of interest and domestic tourists spent on average 3.4 hours at the location.



Points of Interest (POIs) Visited: International Tourists

- Shopping and markets was the most popular type of attraction visited by international tourists and they shopped on average for 2.3 hours.
- Natural attractions, particularly Table Mountain, Cape Point and Knysna Waterfront ranked as the second most popular POI visited by international tourists.
- Bars & Pubs were the third most popular POI for international tourists who spent on average 3.1 hours at the location.
- Among the top 10 POIs visited, international tourists spent the longest time exploring breweries, distilleries and wineries (3.8 hours).



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.)

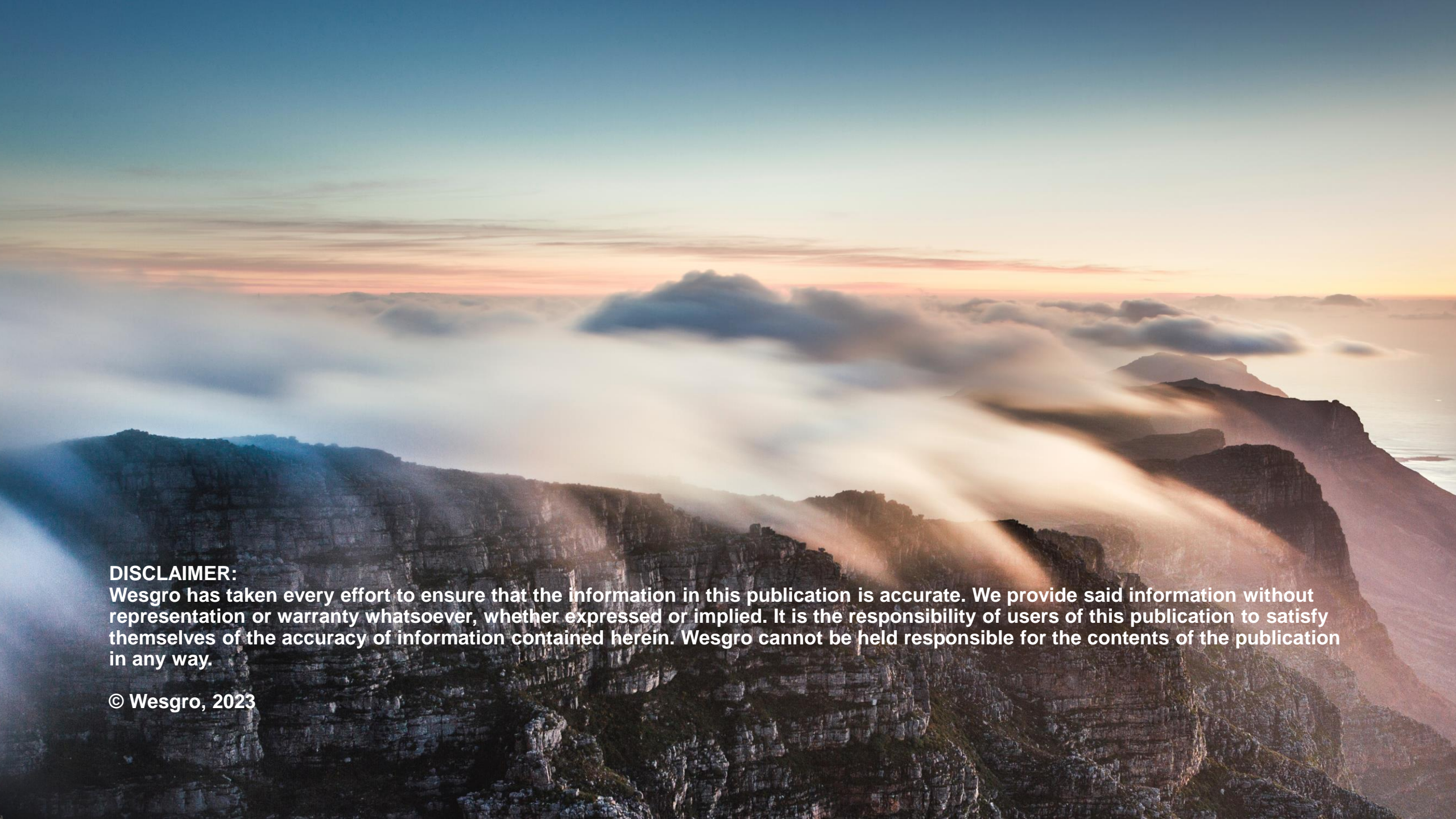
Source: Rove, 2023

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.



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