



Tourism Research Overview

May 2022

Cape Town & the Western Cape

WESGRO

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

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Key Findings:

- As we enter the winter season, tourism recovery in the Western Cape remains steady in May 2022. Off the back of robust growth in April, this month's performance reflected significant recovery once again with some areas exceeding pre-pandemic levels.
- Passengers through CTIA's domestic terminal reached a recovery rate of 83% when compared to the same month in 2019 and George Airport passengers recovered to 97% of 2019 levels. International travel has recovered well since the start of 2022 as airport terminal passenger movement recovered to 74% in May 2022.
- As at March 2022, UK ranked as the top source market to Cape Town, followed by Germany, USA, Netherlands and France. Europe has regained its position as the Western Cape's top region for tourist arrivals, as 7 out of the top 10 source markets to Cape Town (via Air) originated from the region in Q1 (Jan-Mar) 2022.
- Hotel occupancy stood at 49,2% in May 2022, representing a recovery rate of 95% when compared to May 2019. The Average Daily Rate (ADR) for the Western Cape grew to R1, 579.58 in May 2022 and RevPAR (Revenue Per Average Room) reached R776.59. ADR and RevPAR have both exceeded May 2019 levels, recovering to 119% and 113% respectively.
- Visitors to the 27 participating attractions recorded a total of 295,565 in May 2022, a 91% year-on-year growth in the number of visitors and a recovery rate of 56% when compared to May 2019 (525,152).
- Based on mobile location data insights of 12 565 domestic and 538 international tourists, the Cape Winelands was the most popular region among domestic visitors while international visitors mainly spent time in Cape Town. On average, domestic visitors spent the longest time in the Weskus (2,2 days), while international visitors spent on average 3,4 days in Cape Overberg and 2,5 days in Cape Town. Garden Route & Klein Karoo ranked as the most popular region for overnight stays among domestic visitors (56%) and more than 70% of international visitors stayed overnight in Cape Overberg.
- Shopping and markets were the most popular type of attraction visited by both domestic and international tourists. Prominent shopping points included the V&A Waterfront, Willowbridge and Tygervally, and Hermanus Market Square. Domestic visitors spent on average 2,5 hours shopping while international visitors shopped for 3,6 hours.
- Natural attractions; particularly Cape Point, Table Mountain, Knysna Heads and Hottentots Hollandberge were popular with both domestic and international tourists.
- From a sample size of 78 tourists who visited the Stellenbosch Wine Route, 91% were locals, and 9% domestic tourists. Spier was the most visited farm on the route, followed by Zevenwacht and Skilpadvlei.

1. CPT International Terminal Passenger Performance

Year/Month	2019	2020	2021	2021		2022					
				Nov	Dec	Jan	Feb	Mar	Apr	May	
Two-way passengers	2 606 398	810 811	525 441	96 232	76 522	98 211	125 861	161 064	156 933	119 729	
Passenger recovery*	100%	31%	20%	38%	27%	35%	52%	61%	76%	74%	
Average load factor	82%	63%	46%	Arr 67%	Arr 61%	Arr 65%	Arr 76%	Arr 71%	Arr 77%	Arr 60%	
				Dep 59%	Dep 55%	Dep 67%	Dep 69%	Dep 82%	Dep 83%	Dep 75%	

* Passenger recovery compared to same period in 2019

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

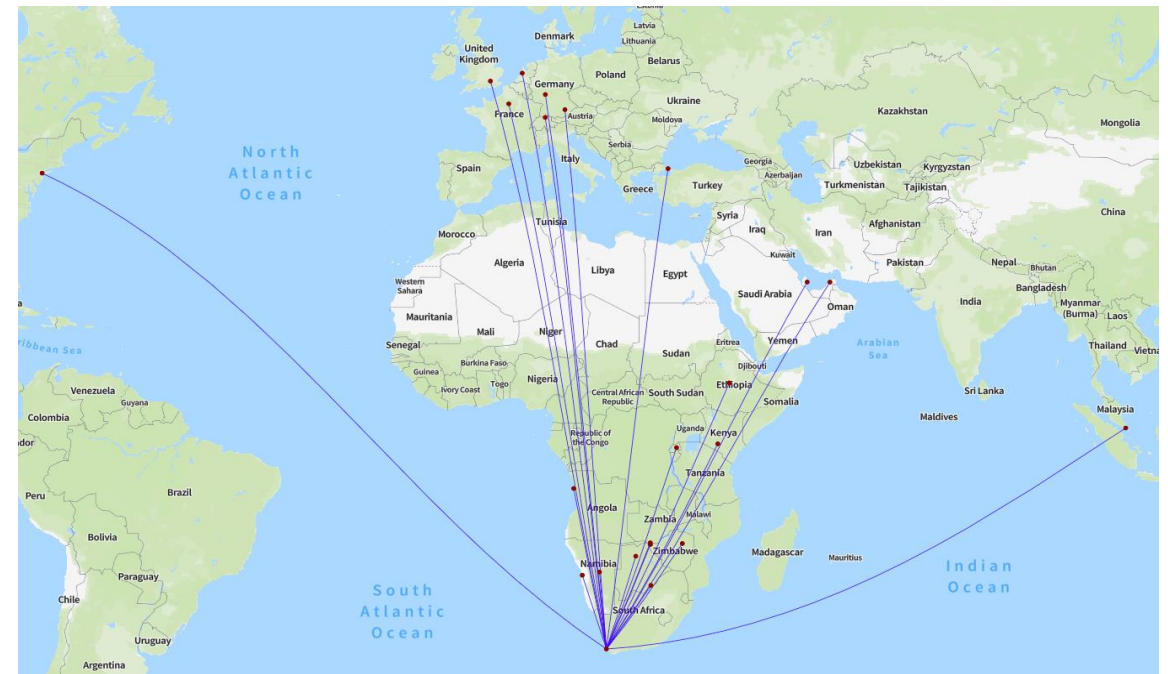
* Average load factor: The % of available seats that is occupied on a flight

Passenger data source: ACSA

Operating carriers



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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	May
Two-way passengers	8 363 307	3 167 542	4 221 365	457 599	520 508	479 942	462 219	556 644	539 257	504 172
Passenger recovery*	100%	38%	50%	66%	66%	74%	71%	72%	75%	83%
Average load factor	78%	64%	67%	Arr 77%	Arr 78%	Arr 73%	Arr 79%	Arr 82%	Arr 81%	Arr 75%
				Dep 78%	Dep 72%	Dep 78%	Dep 76%	Dep 84%	Dep 82%	Dep 73%

* Passenger recovery compared to same period in 2019

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

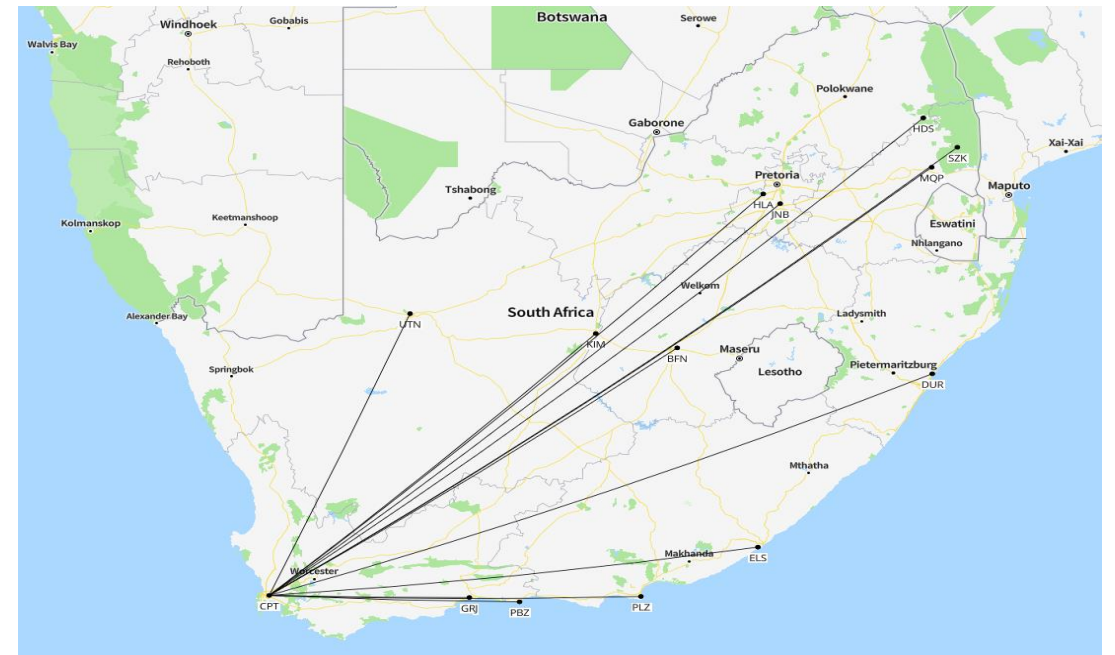
* Average load factor: The % of available seats that is occupied on a flight

Passenger data source: ACSA

Operating carriers



SOUTH AFRICAN AIRWAYS



Source: OAG Schedules Analyser

3. George Airport (GRJ) Passenger Performance

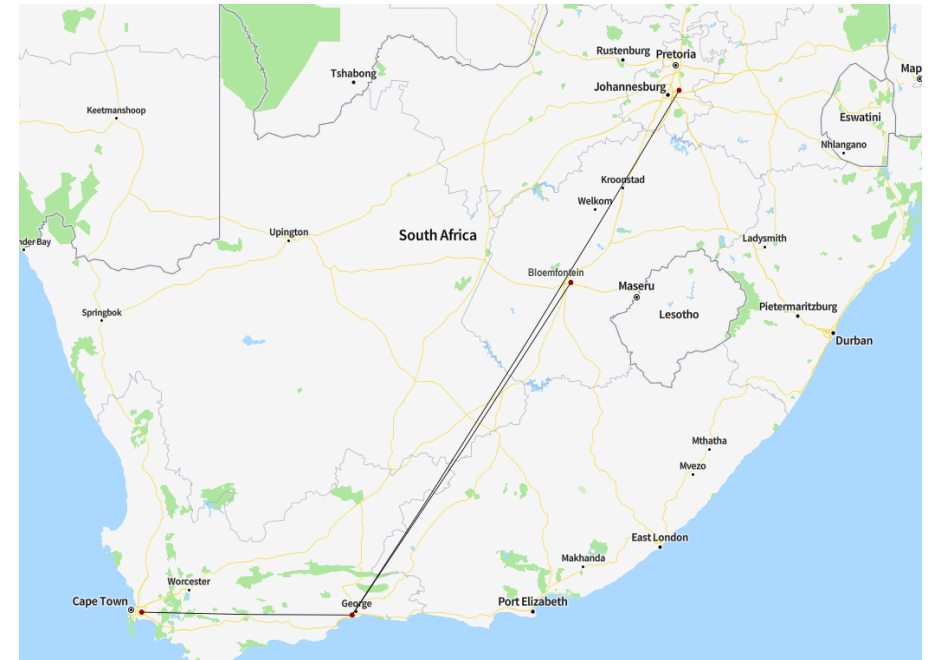
Year/Month	2019	2020	2021	2021			2022				
				Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
Two-way passengers	832 981	340 438	536 886	59 536	56 129	70 708	57 371	53 820	70 528	72 678	61 290
Passenger recovery*	100%	41%	64%	84%	79%	73%	86%	87%	97%	109%	97%

* Passenger recovery compared to same period in 2019

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

Passenger data source: ACSA

Operating carriers

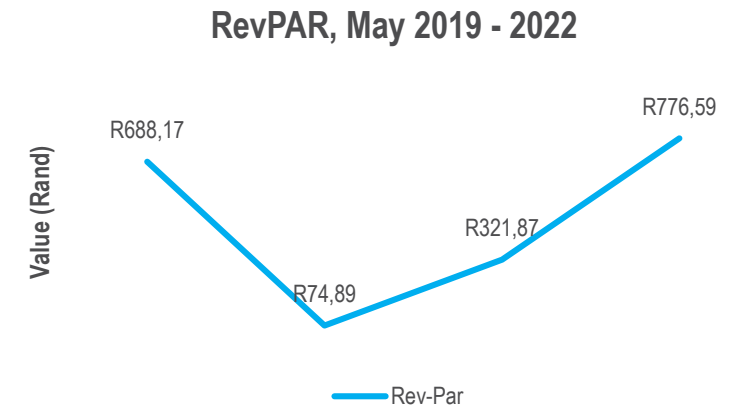
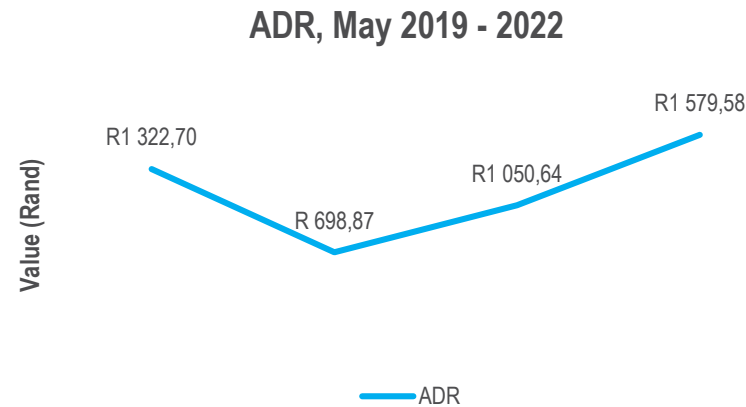
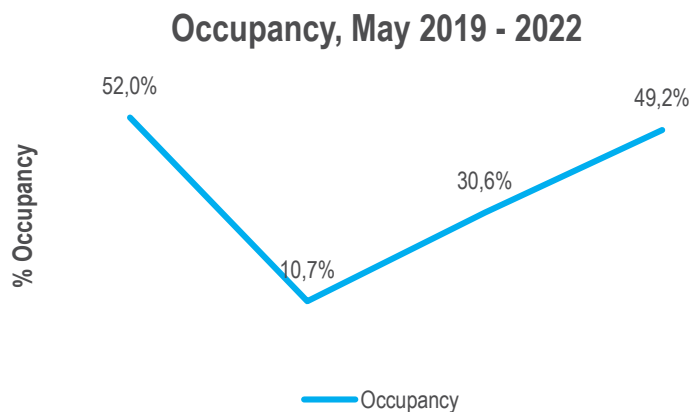


Source: OAG Schedules Analyser

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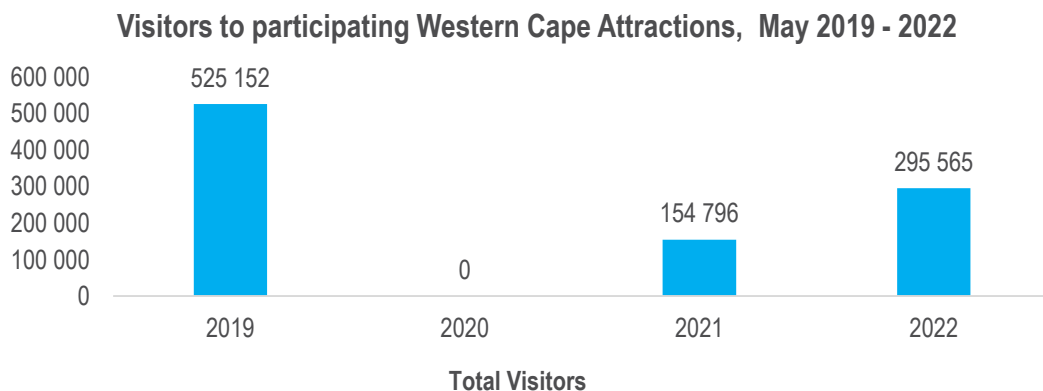
4. Hotel Occupancy in the Western Cape

- **Occupancy** in the Western Cape reached **49,2%** in May 2022, and **grew by 61%** when compared to May 2021, reaching a **recovery rate of 94,6%** when compared to the 52,0% occupancy rate in May 2019.
- **The Average Daily Rate (ADR)** for the Western Cape grew to **R1,579.58** in May 2022, with a remarkable **recovery rate of 119%** on its 2019 figure.
- At **R776,59** in May 2022, **RevPAR (Revenue Per Average Room)** grew by **141%** from its 2021 figure and **recovered to 113%** when compared to May 2019.



5. Western Cape Attractions

- Visitors to the 27 participating attractions across the province recorded a total of **295,565** in May 2022, a **91% year-on-year growth** in the number of visitors and a **56% recovery** when compared to May 2019.
- The **top 5 highest year-on-year growth** rates were recorded for Robben Island (+249%), Table Mountain: Boulders (+217%), Cango Caves (+183%), Kogelberg Nature Reserve (+183%) and Table Mountain: Aerial Cableway (+169%).
- 7 out of the 27** listed attractions **recovered to 100% and more** when compared to the May 2019 figures.

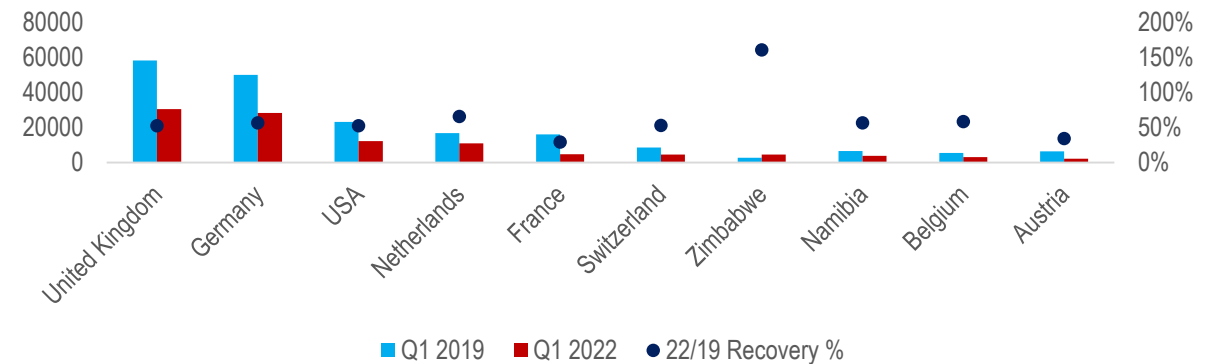


Attractions	May 2021/2022 % Change	May 2019/2022 Recovery %
Cape Town		
Table Mountain National Park	+119%	54%
Table Mountain National Park: Boulders	+217%	47%
Table Mountain National Park: Cape of Good Hope	+116%	51%
Table Mountain Aerial Cableway	+169%	57%
Kirstenbosch National Botanical Garden	+29%	72%
Robben Island	+249%	48%
Cape Overberg		
Cape Agulhas Lighthouse	-94%	2%
Agulhas National Park	+60%	75%
Bontebok National Park	-5%	72%
De Hoop Nature Reserve	+69%	190%
De Mond Nature Reserve	+45%	95%
Harold Porter National Botanical Garden	+18%	130%
Kogelberg Nature Reserve	+183%	226%
Stony Point	-8%	29%
Shipwreck Museum	+31%	26%
Garden Route & Klein Karoo		
Cango Caves	+183%	46%
Wilderness National Park	-10%	87%
Tsitsikamma National Park	+50%	69%
Knysna National Park	+1%	129%
Weskus		
West Coast National Park	-5%	63%
!Khwaattu	+13%	109%
Old Jail	+10%	76%
Cape Karoo		
Karoo National Park	-17%	96%
Cape Winelands		
Avalon Springs (day visitors)	Closed for renovations (May 2022)	
Protea Tractor Trip	+68%	183%
Birds Paradise	-48%	68%
Viljoensdrift River Cruises	-4%	152%

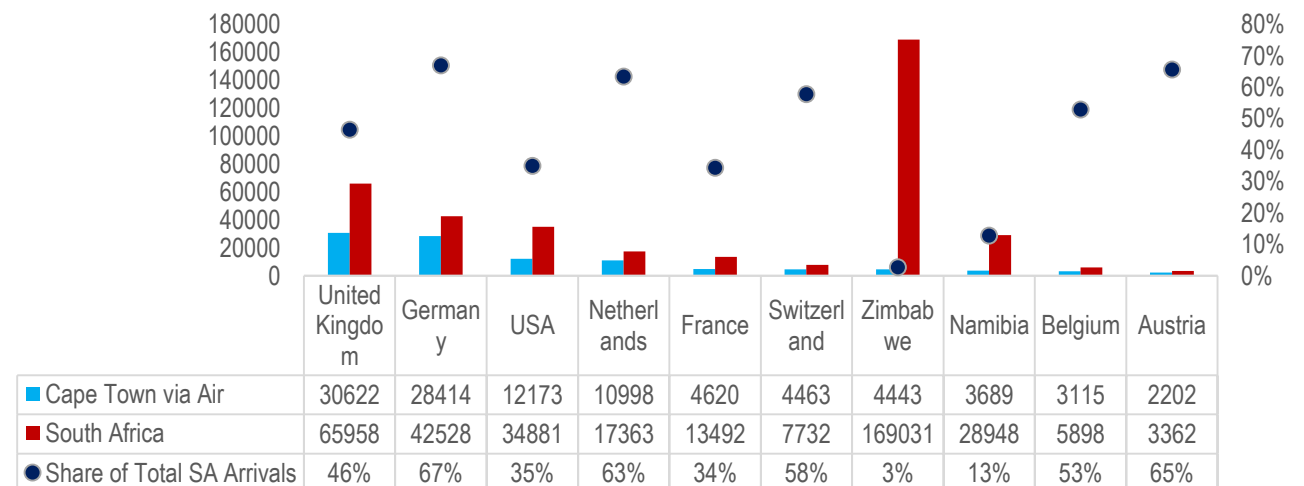
6. Top International Source Markets to Cape Town

- Year-to-date (as at March 2022), the top source market to Cape Town via Air was the **UK**, followed by **Germany**, **USA**, **Netherlands**, and **France**.
- Tourist arrivals from the UK grew** from 1 111 in Q1 last year to 30 622 in Q1 2022 and recovered to just over half of what it was over the same period in 2019.
- Germany** (28 414 tourist arrivals) and **USA** (12 173 tourist arrivals) have **both also recovered to more than half** of its Q1 2019 figures. The **Netherlands** with 10 998 tourist arrivals, **recovered to two thirds** and **France** (4 620 tourist arrivals) **had a recovery rate of 29%** on Q1 2019.
- Zimbabwe** (4 443 tourist arrivals) **led as the top source market from the African continent, followed by Namibia** with 3 689 tourist arrivals. Among the top ten list, **Zimbabwe** was the only country that reached and **exceeded pre-pandemic levels** (161% recovery rate).
- Cape Town held the largest share (67%) of German tourists who travelled to South Africa in Q1 2022**, followed by Austria (65%) and Netherlands (63%).

Tourism Recovery in Top 10 Source Markets to Cape Town via Air:
Jan - Mar 2022 / Jan - Mar 2019



Top 10 Source Markets to Cape Town (via Air) and South Africa, Q1 (Jan-Mar) 2022



Source: StatsSA, 2022

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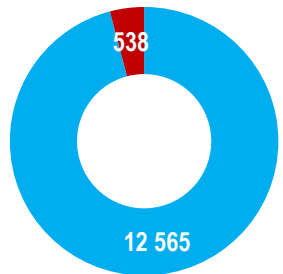
Visitor Trends Mobile Location Data Insights

7. 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.

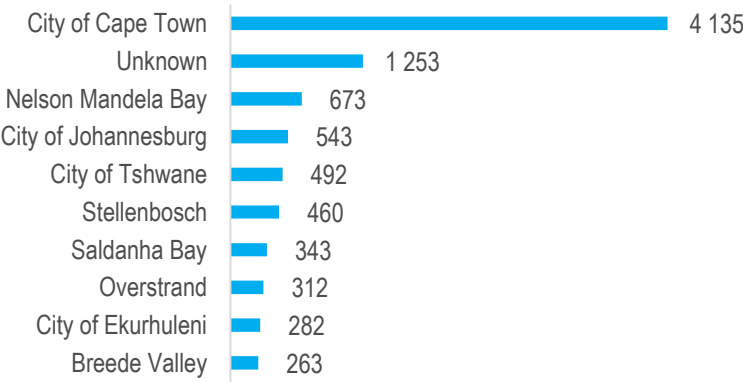
The insights in this report represents mobile location data from a total sample of **13 103**, with **12 565 domestic** and **538 international** tourists who visited the Western Cape in May 2022. Within the domestic data set, a third of the sampled tourists were from the City of Cape Town and from the international sampled tourists, 356 were from the United States.

Total Sample Size, May 2022

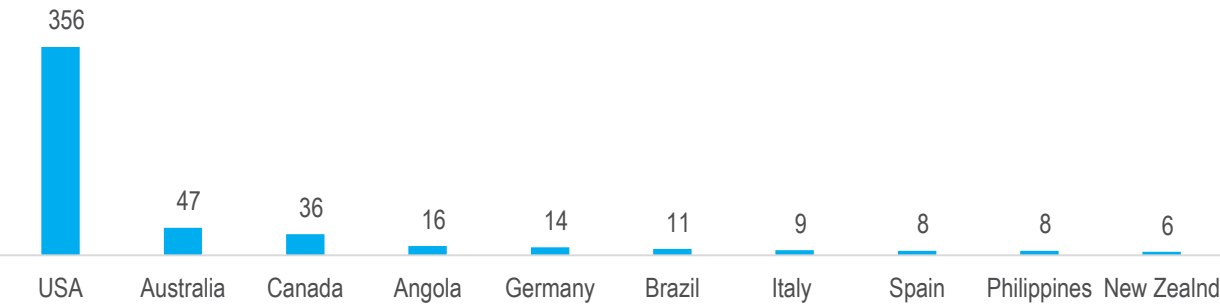


■ Domestic ■ International

Domestic Origin Municipality, May 2022

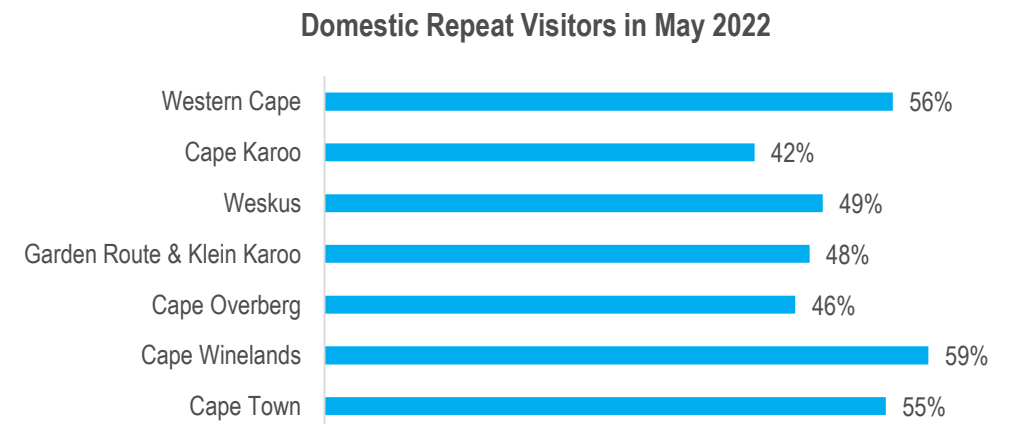
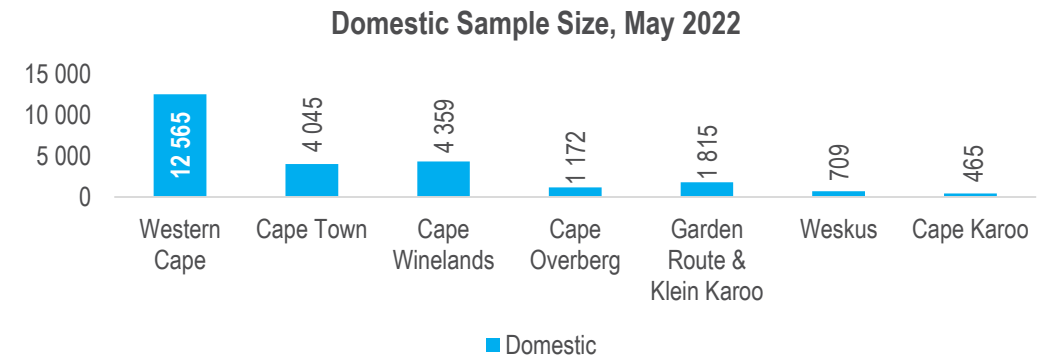


International Origin Country, May 2022



7.1. Mobile Insights: Domestic Visitor Trends

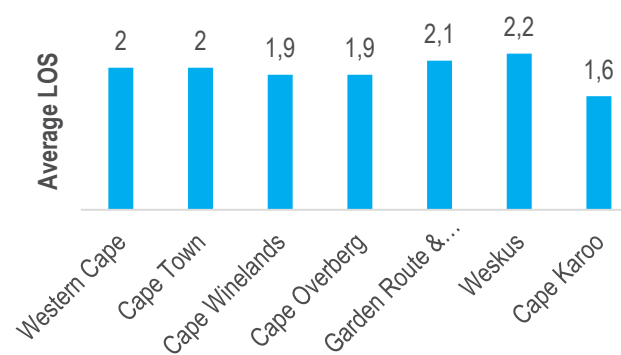
- In May 2022, the Cape Winelands (35%) and Cape Town (32%) saw the most domestic visitors with respect to volume and Cape Karoo (4%) recorded the least.
- The Cape Winelands (59%) was the most popular region for repeat visits, followed by Cape Town (55%). The Cape Winelands also had a slightly higher repeater rate than the general average for the province (56%).



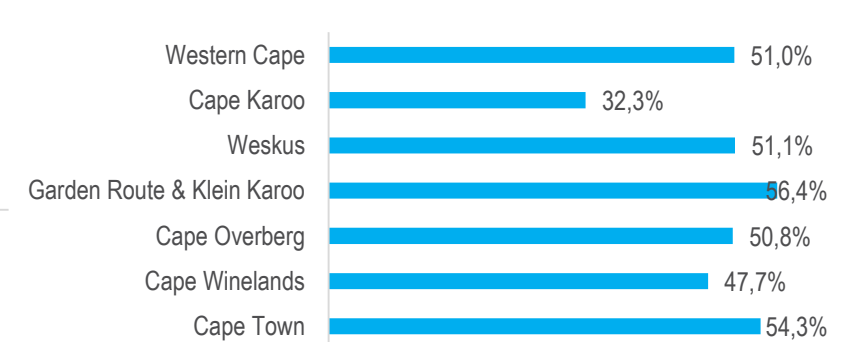
7.1. Mobile Insights: Domestic Visitor Trends

- On average, domestic visitors spent the longest time in the Weskus (2,2 days) and the shortest time in the Cape Karoo (1,6 days).
- Close to 60% of sampled domestic tourists stayed overnight in the Garden Route & Klein Karoo, which is higher than the general average for the province (51%). 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.

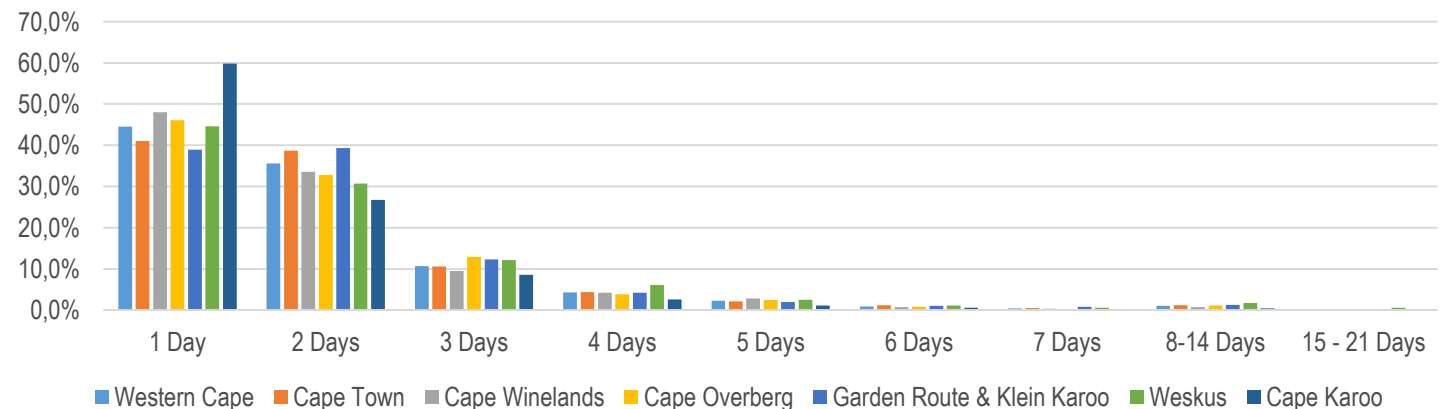
Domestic Length of Stay (LOS), May 2022



Domestic Overnight Stays, May 2022

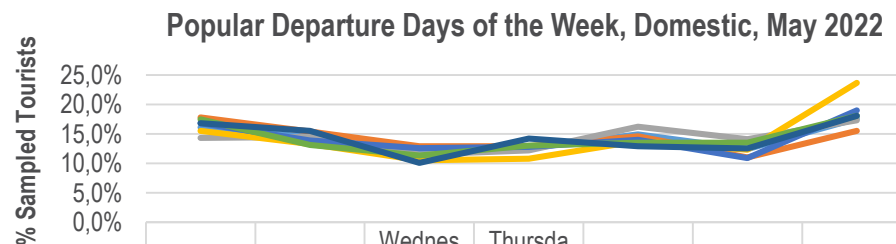


Average Length of Stay (number of days): Domestic, May 2022

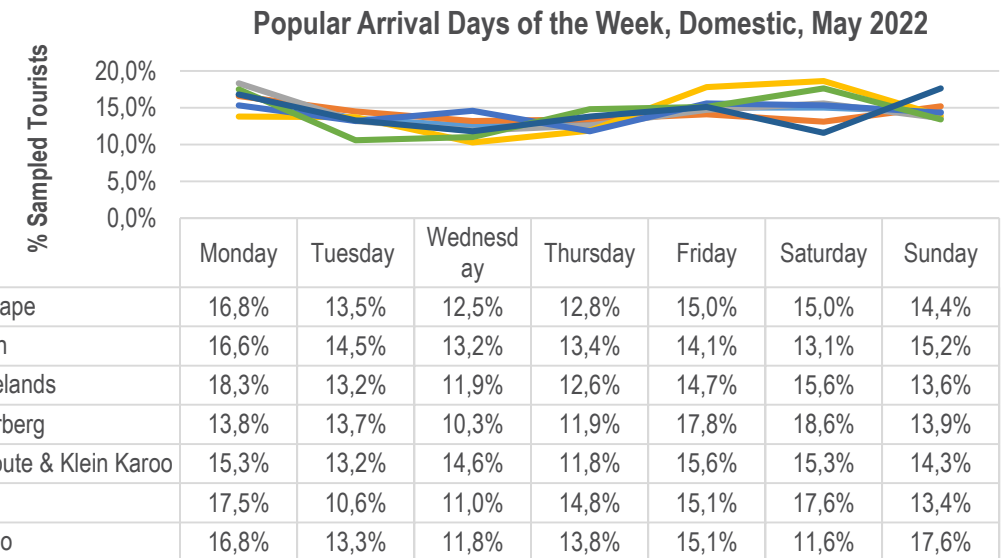


7.1. Mobile Insights: Domestic Visitor Trends

- Domestic visitors to the province were most likely to arrive on a Monday (16,8%) and depart on a Sunday (17,6%) or Monday (16,1%).
- In the Cape Winelands, Monday (18,3%) and Saturday (15,6%) were the most popular arrival days and Sunday (17,3%) was the most common day for departure in May 2022.
- Domestic visitors to the Garden Route & Klein Karoo arrived mostly on a Friday (15,6%) and departed on a Sunday (19,0%) or Monday (16,8%).



	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Western Cape	16,1%	14,5%	11,9%	12,5%	14,9%	12,4%	17,6%
Cape Town	17,8%	15,4%	12,9%	12,9%	14,6%	11,0%	15,5%
Cape Winelands	14,3%	14,5%	11,5%	12,2%	16,2%	14,1%	17,3%
Cape Overberg	15,5%	13,3%	10,5%	10,8%	13,8%	12,3%	23,7%
Garden Route & Klein Karoo	16,8%	13,9%	12,6%	12,8%	14,0%	10,9%	19,0%
Weskus	17,5%	13,1%	11,3%	13,0%	13,5%	13,5%	18,1%
Cape Karoo	16,8%	15,5%	10,1%	14,2%	12,9%	12,5%	18,1%

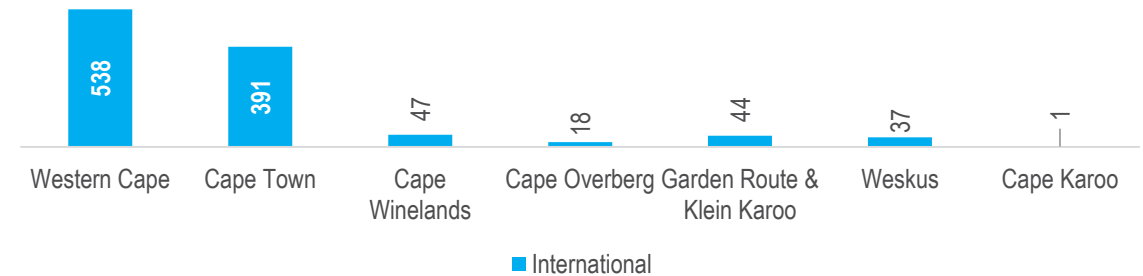


- In the Cape Karoo, which saw majority day visitors, Sunday was the most popular arrival and departure day.
- Cape Town arrival days were most common on Monday (16,6%) and Sunday (15,2%) and departure was most popular on a Monday (17,8%) and Sunday (15,5%) as well.
- Saturday (18,6%) was the most popular arrival day in the Cape Overberg and Sunday (23,7%) the most common departure day.
- In the Weskus, Saturday (17,6%) and Sunday (18,1%) was the most popular arrival and departure days, respectively.

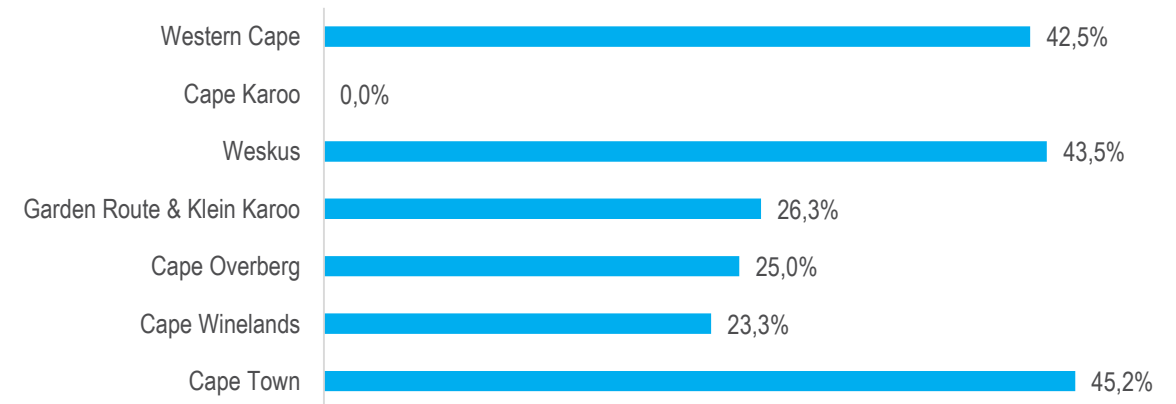
7.2. Mobile Insights: International Visitor Trends

- Nearly three quarters of the sampled international tourists visited Cape Town (391) followed by Cape Winelands (47) and Garden Route & Klein Karoo (44).
- Visitor trends for the Cape Karoo is based on a sample size of only 1 international tourist and therefore not an accurate statistical representation for the region.
- Cape Town, Weskus, and Garden Route & Klein Karoo saw the most international repeat visitors in May 2022.

International Sample Size, May 2022



International Repeat Visits, May 2022

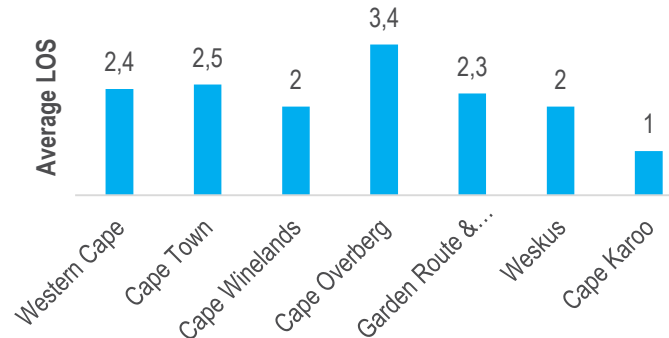


Source: Rove, 2022

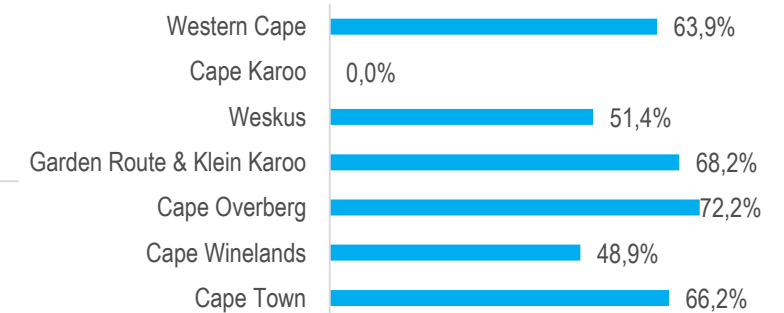
7.2. Mobile Insights: International Visitor Trends

- On average, international visitors spent the longest time in Cape Overberg (3,4 days) followed by Cape Town (2,5 days). Note: Cape Overberg results represent a much smaller sample size (18) than the sample size in Cape Town (391).
- Over 70% of sampled international tourists stayed overnight in the Cape Overberg and more than 65% stayed overnight in both Cape Town and Garden Route & Klein Karoo.
- An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.

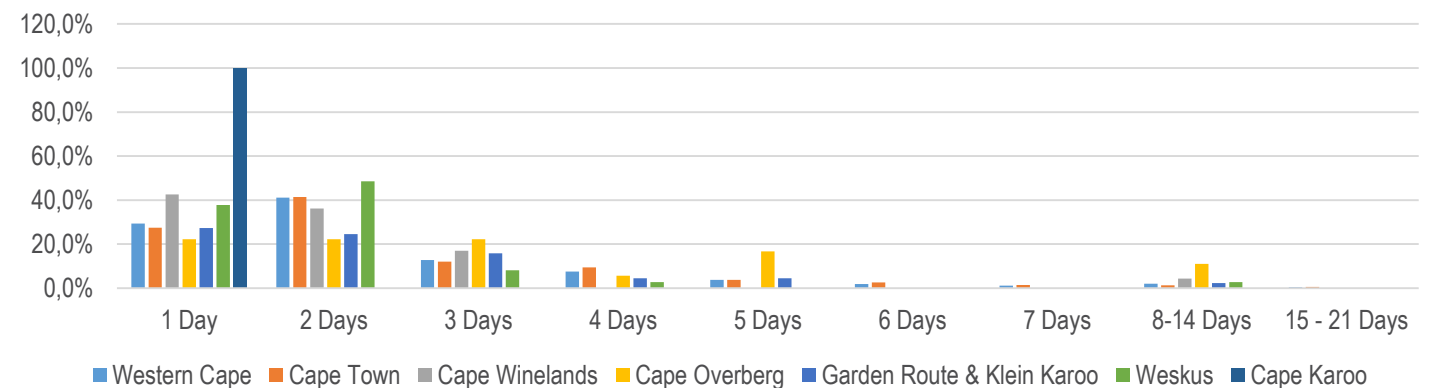
International Length of Stay (LOS), May 2022



International Overnight Stays, May 2022



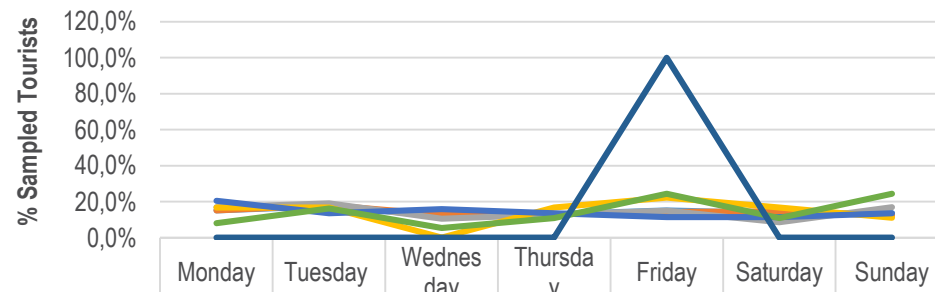
Average Length of Stay (Number of Days): International, May 2022



7.2. Mobile Insights: International Visitor Trends

- International visitors to the province were most likely to arrive on a Friday or Monday and depart on a Tuesday.
- In the Cape Winelands, Monday was the most popular arrival day and Tuesday the most common departure day.
- International visitors to the Garden Route & Klein Karoo typically arrived on a Wednesday and departed on a Monday.

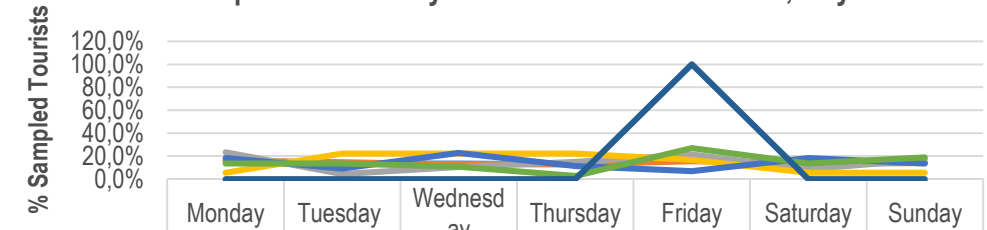
Popular Departure Days of the Week: International, May 2022



	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Western Cape	15,2%	17,5%	11,9%	13,0%	15,2%	13,6%	13,6%
Cape Town	15,1%	17,9%	12,8%	13,0%	14,3%	14,6%	12,3%
Cape Winelands	17,0%	19,1%	10,6%	12,8%	14,9%	8,5%	17,0%
Cape Overberg	16,7%	16,7%	0,0%	16,7%	22,2%	16,7%	11,1%
Garden Route & Klein Karoo	20,5%	13,6%	15,9%	13,6%	11,4%	11,4%	13,6%
Weskus	8,1%	16,2%	5,4%	10,8%	24,3%	10,8%	24,3%
Cape Karoo	0,0%	0,0%	0,0%	0,0%	100,0%	0,0%	0,0%

Source: Rove, 2022

Popular Arrival Days of the Week: International, May 2022



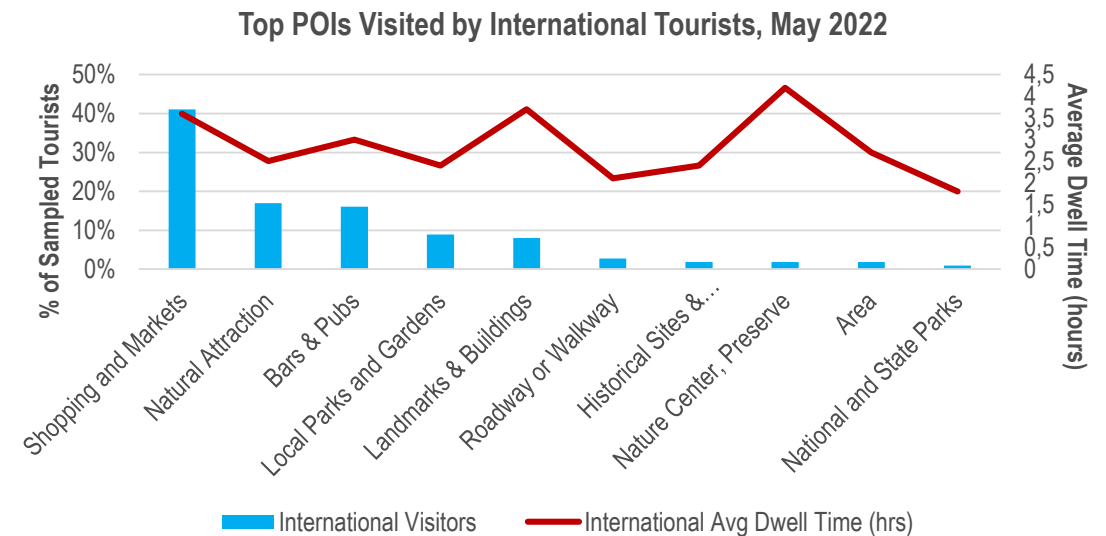
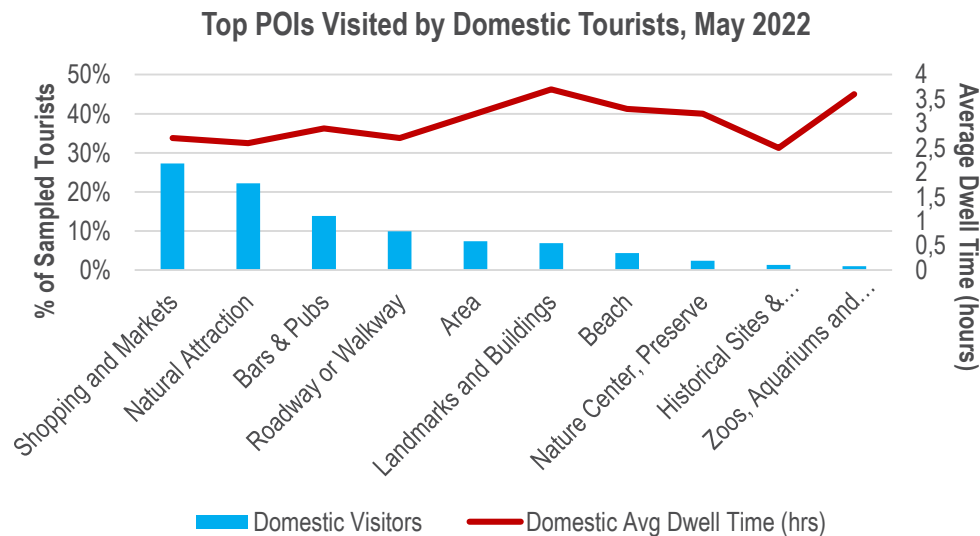
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Western Cape	16,4%	13,6%	13,6%	12,6%	16,4%	13,4%	14,1%
Cape Town	16,1%	14,8%	12,8%	13,0%	15,6%	13,8%	13,8%
Cape Winelands	23,4%	4,3%	10,6%	14,9%	21,3%	8,5%	17,0%
Cape Overberg	5,6%	22,2%	22,2%	22,2%	16,7%	5,6%	5,6%
Garden Route & Klein Karoo	18,2%	9,1%	22,7%	11,4%	6,8%	18,2%	13,6%
Weskus	13,5%	13,5%	10,8%	2,7%	27,0%	13,5%	18,9%
Cape Karoo	0,0%	0,0%	0,0%	0,0%	100,0%	0,0%	0,0%

Source: Rove, 2022

- The sampled visitor in the Cape Karoo, arrived and departed on a Friday.
- Cape Town arrival days were most common on a Monday or Friday and departure was most popular on a Tuesday.
- Arrivals in the Cape Overberg occurred mid-week (Tuesday to Thursday) and Friday was the most common departure day.
- In the Weskus, Friday was the most popular arrival day and also a common departure day along with Sunday.

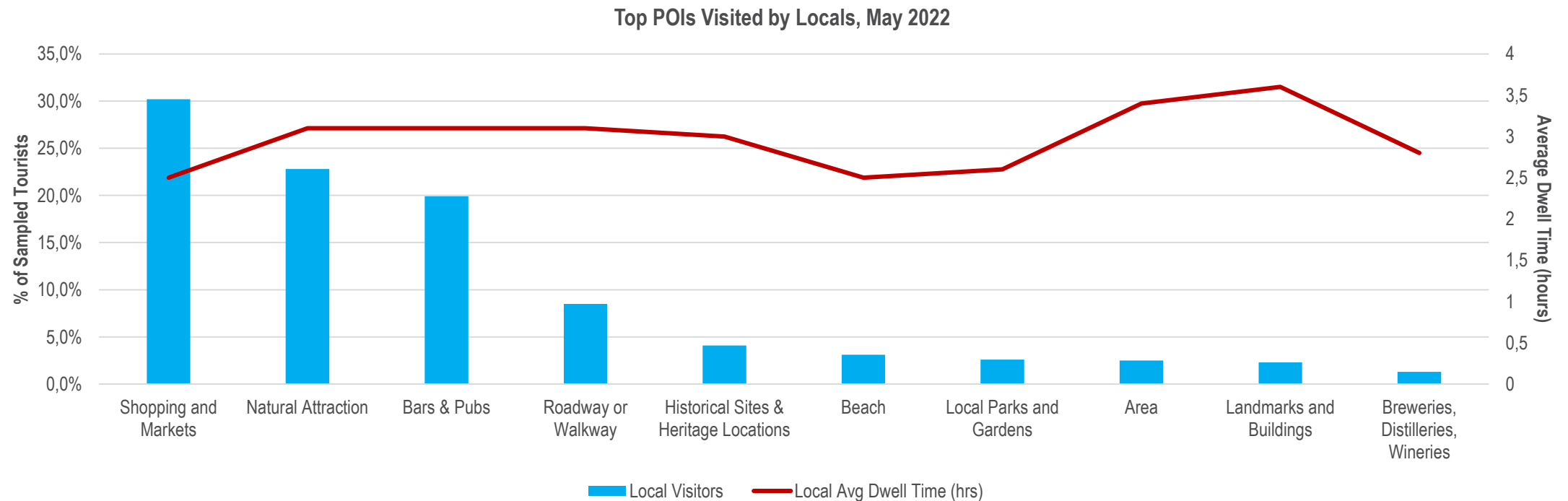
7.3. Points of Interest (POIs) Visited

- Shopping and markets was the most popular type of attraction visited by both domestic and international tourists. Prominent shopping points included the V&A Waterfront, Willowbridge and Tygervally, and Hermanus Market Square.
- Domestic visitors spent on average 2,5 hours shopping while international visitors shopped for 3,6 hours.
- Natural attractions, particularly Cape Point, Table Mountain, Knysna Heads and Hottentots Hollandberge were popular with both domestic and international tourists.
- Bars & Pubs in the city centre were the third most popular point of interest for both international and domestic tourists who spent on average 3 hours and 2,9 hours at the location, respectively.



7.3. Points of Interest (POIs) Visited

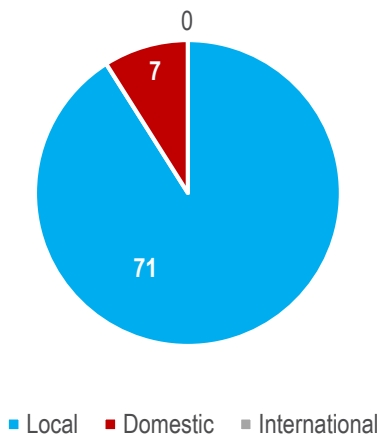
- Similar to domestic tourist trends, shopping and markets, natural attractions and bars and pubs, ranked as the top three points of interest for local visitors. Locals spent on average 2,5 hours at shops and markets, 3,1 hours at natural attractions and 3,1 hours at bars and pubs.
- Locals spent the longest time (3,6 hours) exploring Landmarks/Buildings and Areas which included the Cederberg Wilderness Area and Van Dyks Bay.



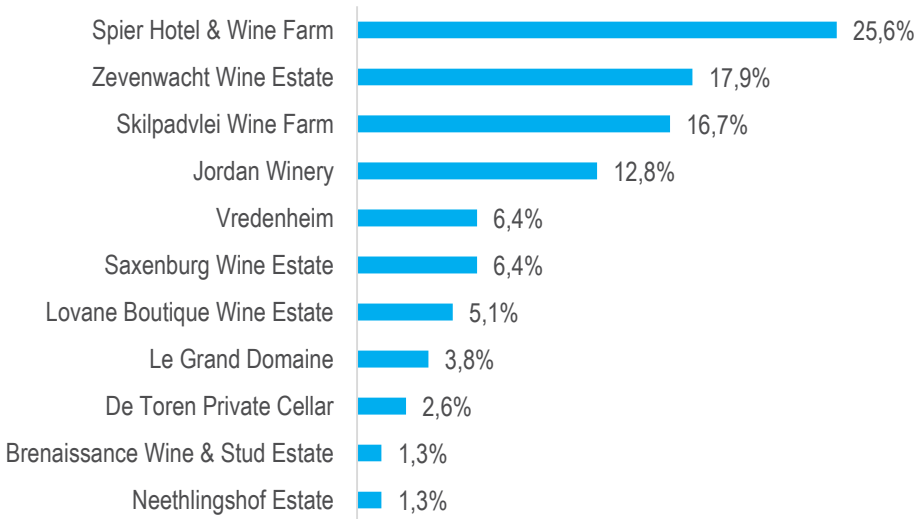
7.4. Stellenbosch Valley Wine Route

- From a sample size of 78 tourists who visited the Stellenbosch Wine Route 91% were locals and 9% domestic. No international tourists were recorded in May 2022.
- Spier was the most visited farm on the route, followed by Zevenwacht and Skilpadvlei. Jordan Winery had the longest dwell time (4,9 hours), followed by De Toren Private Cellar (4,8 hours).

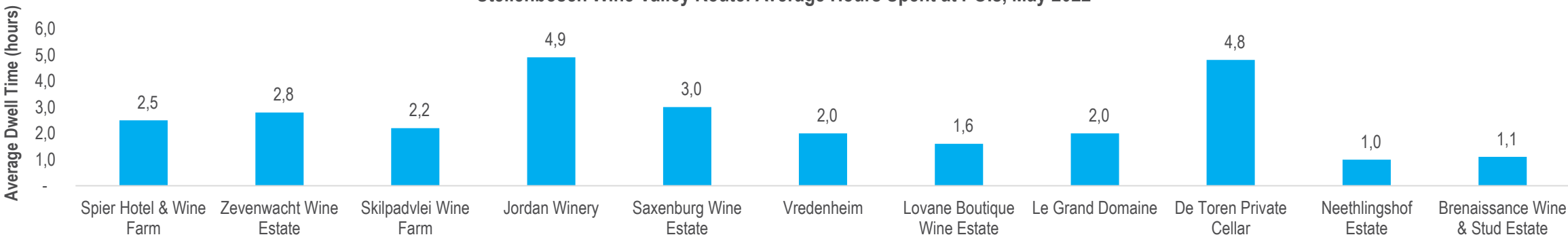
Sample Size: Visitors to Stellenbosch Wine Valley, May 2022



Stellenbosch Valley Wine Route: Top POIs Visited, May 2022



Stellenbosch Wine Valley Route: Average Hours Spent at POIs, May 2022



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.)

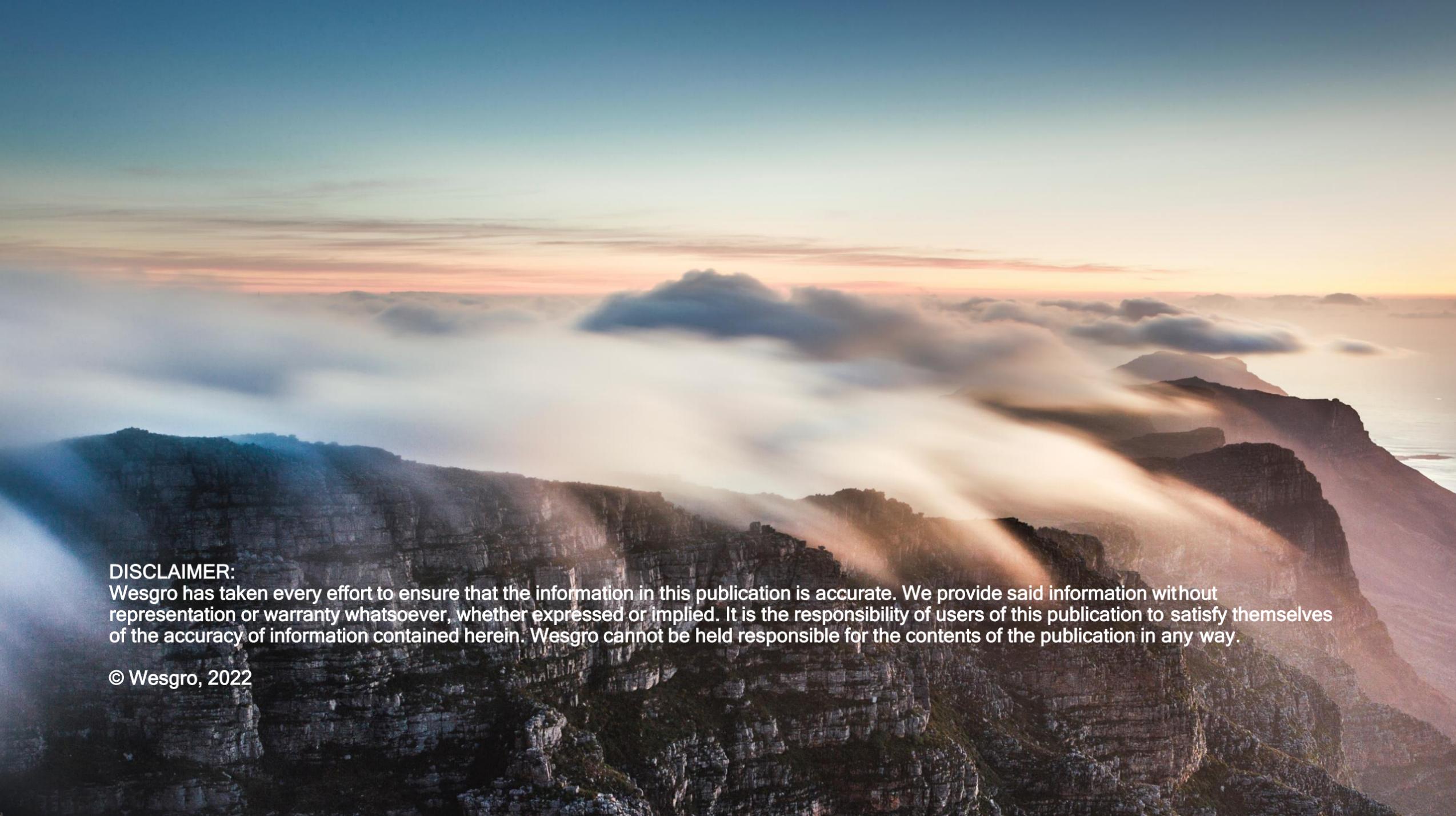
Source: Rove, 2022

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: <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 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: <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 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: <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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