

Tourism Statistics 2006-2010



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FOREWORD



Over the last 50 years, more and more countries have opened up to tourism, and today it is one of the key drivers of socio-economic progress, creating jobs, developing infrastructure, and generating export revenues. The UNWTO has recently reported that globally, as an export category, tourism ranks fourth after fuels, chemicals and automotive products. For many countries it is one of the main sources of foreign exchange income and the number one export category, creating much needed employment and opportunities for development.

Tourism, does not only constitute holidays, but it includes travel for other purposes such as visiting friends and relatives, and business trips. Therefore when we talk about the tourism industry and looking after our tourists, we need to consider the needs of many different types of visitor.

Here in Botswana we have been blessed with a land that is distinctly appealing to international tourists. Leisure tourists are attracted by our stunning landscapes, plentiful wildlife, warm friendly people, and places that are unique on this planet and renowned across the globe, such as the Okavango Delta.

Business tourists can enjoy our ever-expanding range of quality accommodation, conference and meeting facilities, and a thriving economy. The proximity of Gaborone to Johannesburg, with frequent flights and an excellent road network makes our capital city even more attractive for business tourists.

Although visitors to Botswana who come to see friends and family do not usually stay in hotels and lodges, they are an important part of the tourism sector. They are typically big spenders in the shops, and also on transport; so they contribute in a different way.

This report updates our previous statistics report, *Tourism Statistics 2007-2009*, by including data for 2010, and the results of our latest Tourism Satellite Account, which shows that the direct contribution of tourism to the GDP of Botswana is 3.7%

It is our firm belief that by better understanding the tourism sector, we can all benefit from what it has to offer. Most importantly, it helps us to make the right decisions about tourism development so that we can protect our environment, generate jobs, and benefit as a nation from the growth of this vibrant industry.

I hope that this report will help you to better understand the tourism sector, and enable you to make the decisions you need.

A handwritten signature in black ink, appearing to read 'Kelebaone Gloria Maselesele'. The signature is written over a light blue horizontal striped background.

Kelebaone Gloria Maselesele
Director of Tourism

DEFINITIONS

What is Tourism?

Tourism comprises the activities of persons travelling to and staying in places outside of their usual environment for not more than one consecutive year for leisure, business and other purposes.

Usual environment: the usual environment of a traveller consists of the area of 80 kilometres radius around his/her place of residence plus all other places s/he visits more than once a week.

There are 3 Forms of Tourism...

- **Domestic Tourism:** residents of Botswana travelling only within Botswana
- **Inbound Tourism:** non-residents of Botswana travelling to and within the country
- **Outbound Tourism:** residents of Botswana travelling to and within another country

Basic Tourism Units

All types of travellers engaged in tourism are described as visitors. Therefore the term "visitor" represents the basic concept for the whole system of tourism statistics. Within this, there are:

- **Tourists:** these are visitors who stay at least one night in a collective or private accommodation
- **Day Visitors:** these are visitors who do not spend the night in a collective or private accommodation

Tourism Expenditure

Tourism expenditure is the total consumption expenditure made by a visitor or on behalf of a visitor for and during his/her trip and stay at the destination.

Classifications of Tourism Demand

Purpose of Visit for Inbound, Outbound and Domestic Tourism

1. Leisure, recreation and holidays
2. Visiting friends and relatives
3. Business and professional
4. Transit
5. Other (includes religious, health and other types of trip not included above)

STATISTICAL SUMMARY FOR 2010

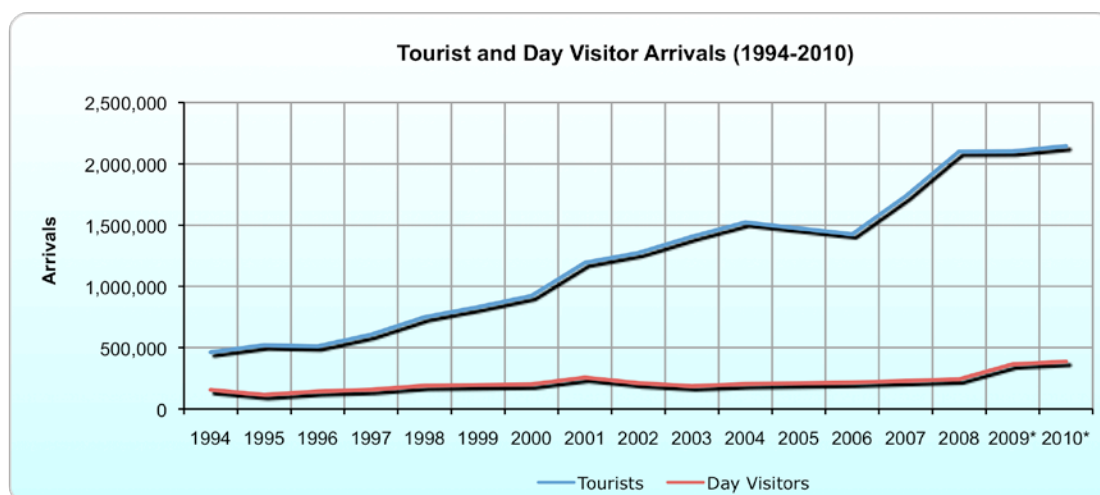
International Tourist Arrivals	2,145,079
Average Annual Growth Rate: Tourist Arrivals 2006-2010	10.7%
Average Length of Stay of International Tourists (nights)	5.3
International Tourist Expenditure (pula)*	4.7 billion
International Tourist Average Spend/Night (pula)*	429
Domestic Overnight Tourist Trips	1,166,141
Domestic Tourist Expenditure: Day and Overnight Trips (pula)	955 million
Tourism Direct Gross Value Added (pula)*	2.9 billion
Tourism Contribution to GDP*	3.7%
Accommodation Room Occupancy Rate	48.1%
Accommodation Bed Occupancy Rate	40.7%
Average Length of Stay in Accommodation (nights)	2.2

* 2009 data

INTERNATIONAL TOURIST ARRIVALS

International Tourist Arrivals: 1994-2010

There were an estimated 2.1 million tourist (overnight visitor) arrivals in Botswana in 2010. The growth of tourist arrivals since 1994 has averaged 10.1% per annum.



Day visitors accounted for an estimated 386,900 arrivals in 2010. The growth of day visitors over the period since 1994 has been lower than for tourists, averaging 5.8% per annum.

Year	Tourists		Day Visitors	Total Visitors
	Arrivals	Growth Rate (%)		
1994	463,196		156,386	619,582
1995	521,041	12.5	115,440	636,481
1996	512,118	-1.7	143,845	655,963
1997	606,781	18.5	157,624	764,405
1998	749,544	23.5	190,413	939,957
1999	831,875	11	195,728	1,027,603
2000	923,250	11	201,191	1,124,441
2001	1,193,399	29.3	257,228	1,450,627
2002	1,273,814	6.7	211,355	1,485,169
2003	1,405,985	10.4	186,512	1,592,497
2004	1,522,847	8.3	203,870	1,726,717
2005	1,474,421	-3.2	209,986	1,684,407
2006	1,425,994	-3.3	216,286	1,642,280
2007	1,735,855	21.7	229,263	1,965,118
2008	2,100,918	21.0	243,019	2,343,937
2009*	2,103,019	0.1	365,000	2,468,019
2010*	2,145,079	2.0	386,900	2,531,979
Av. Growth	10.1%		5.8%	9.2%

* estimate

INTERNATIONAL TOURIST ARRIVALS

International Tourist Arrivals by Purpose of Visit: 2001-2008

Leisure tourists account for almost 19% (or one in five) of all tourist arrivals, with VFR being the most significant purpose of visit segment with almost 47% of all arrivals.

Year	Leisure	VFR	Business	Transit	Other	Total
2001	275,613	460,157	97,618	224,467	135,544	1,193,399
2002	177,909	513,408	123,159	223,045	236,293	1,273,814
2003	231,295	498,921	105,722	232,959	337,088	1,405,985
2004	247,998	470,858	79,633	180,085	544,273	1,522,847
2005	253,812	484,178	78,475	221,780	436,176	1,474,421
2006	259,626	497,498	77,316	263,475	328,079	1,425,994
2007	324,914	853,241	118,156	300,722	138,822	1,735,855
2008	390,681	984,297	146,801	400,033	179,106	2,100,918
Share (%) 2008	18.6	46.9	7.0	19.0	8.5	100.0

The table below shows the share of tourists by purpose of visit for each of the years. It can be seen that VFR travel has increased significantly over the period 2001-2008. Over the period 2006-2008 leisure travel has remained broadly static in terms of the share of all tourists travelling to Botswana.

Year	Leisure	VFR	Business	Transit	Other	Total
2001	23.1	38.6	8.2	18.8	11.4	100.0
2002	14.0	40.3	9.7	17.5	18.6	100.0
2003	16.5	35.5	7.5	16.6	24.0	100.0
2004	16.3	30.9	5.2	11.8	35.7	100.0
2005	17.2	32.8	5.3	15.0	29.6	100.0
2006	18.2	34.9	5.4	18.5	23.0	100.0
2007	18.7	49.2	6.8	17.3	8.0	100.0
2008	18.6	46.9	7.0	19.0	8.5	100.0

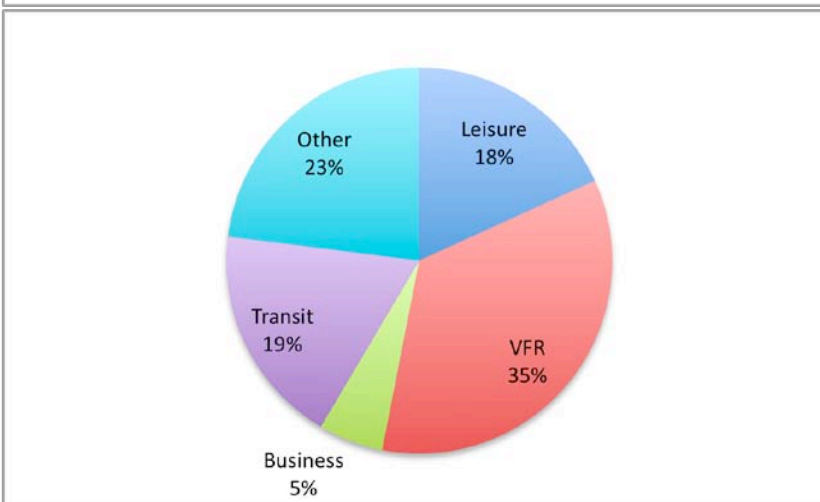
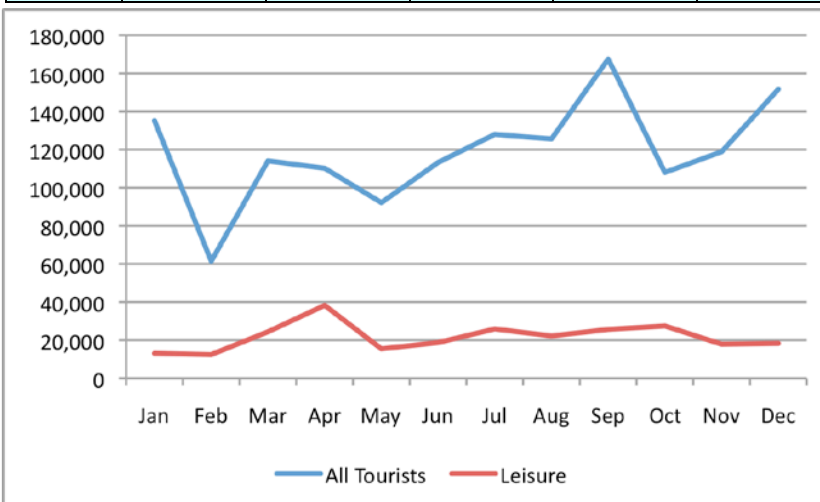
INTERNATIONAL TOURIST ARRIVALS

International Tourist Arrivals: 2006

There were just under 260,000 leisure tourists (18.2% of all arrivals) visiting Botswana in 2006, with the peak month for these tourists being April (38,259 arrivals). Overall, September was the peak month for all types of tourist, with 11.7% of the annual arrivals visiting during that month.

Tourist Arrivals by Purpose of Visit: 2006

Month	Leisure	VFR	Business	Transit	Other	Total	
						Arrivals	%
Jan	13,059	61,377	8,233	25,882	26,620	135,171	9.5
Feb	12,433	10,902	3,823	15,321	18,954	61,433	4.3
Mar	24,383	31,779	8,822	18,891	30,224	114,099	8.0
Apr	38,259	32,283	7,073	20,412	12,189	110,216	7.7
May	15,442	30,556	5,598	15,681	24,886	92,163	6.5
Jun	18,723	48,701	5,596	16,315	23,909	113,244	7.9
Jul	25,882	50,579	5,151	22,646	23,719	127,977	9.0
Aug	22,182	50,673	6,780	21,802	24,163	125,600	8.8
Sep	25,636	58,169	8,717	30,440	44,530	167,492	11.7
Oct	27,447	20,908	6,422	18,776	34,493	108,046	7.6
Nov	17,878	43,416	6,218	22,113	29,242	118,867	8.3
Dec	18,302	58,155	4,883	35,196	35,150	151,686	10.6
Total	259,626	497,498	77,316	263,475	328,079	1,425,994	100.0
%	18.2	34.9	5.4	18.5	23.0	100.0	

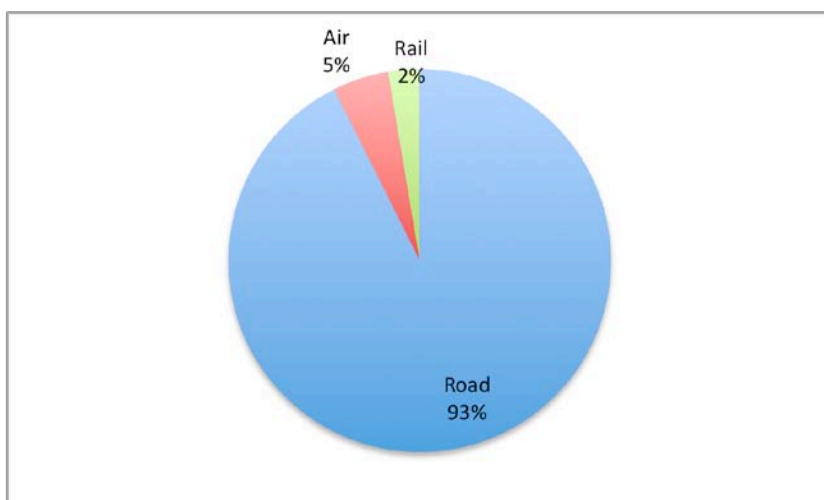


INTERNATIONAL TOURIST ARRIVALS

Tourist Arrivals by Mode of Transport: 2006

Month	Road	Air	Rail	Other	Total	
					Arrivals	%
Jan	130,490	4,617	30	34	135,171	9.5
Feb	58,455	2,914	0	64	61,433	4.3
Mar	107,746	6,303	10	40	114,099	8.0
Apr	105,608	4,588	0	20	110,216	7.7
May	85,978	6,171	0	14	92,163	6.5
Jun	99,158	6,825	7,231	30	113,244	7.9
Jul	114,492	8,070	5,402	13	127,977	9.0
Aug	116,945	3,766	4,290	599	125,600	8.8
Sep	156,263	6,495	4,710	24	167,492	11.7
Oct	96,630	6,806	4,552	58	108,046	7.6
Nov	108,105	6,233	4,520	9	118,867	8.3
Dec	140,695	4,748	6,230	13	151,686	10.6
Total	1,320,565	67,536	36,975	918	1,425,994	100.0
%	92.6	4.7	2.6	0.1	100.0	

Almost 93% of all tourist arrivals entered Botswana by road, with around 5% visiting by air. The peak month for arrivals by air was July (8,070 arrivals).



INTERNATIONAL TOURIST ARRIVALS

Tourist Arrivals by Country of Residence: 2006

Country of Residence	Leisure	VFR	Business	Other	Total
Africa					
South Africa	113,669	108,856	48,939	244,865	516,329
Zimbabwe	31,728	337,716	13,495	116,930	499,869
Zambia	13,010	15,639	4,834	92,718	126,201
Namibia	5,461	8,279	1,732	63,058	78,530
Swaziland	976	731	310	1,443	3,460
Malawi	372	1,110	221	1,662	3,365
Other Africa	2,374	3,637	1,122	4,832	11,965
Total Africa	167,590	475,968	70,653	525,508	1,239,719
Americas					
USA	16,190	1,159	501	3,580	21,430
Canada	2,111	322	141	792	3,366
Other Americas	30	0	0	40	70
Total Americas	18,331	1,481	642	4,412	24,866
East Asia/Pacific					
Australia	5,023	294	325	1,212	6,854
Japan	3,366	50	50	940	4,406
Other EAP	2,108	352	292	1,240	3,992
Total EAP	10,497	696	667	3,392	15,252
Europe					
United Kingdom	16,910	1,898	1,408	3,644	23,860
Germany	7,672	403	92	3,072	11,239
Netherlands	6,429	128	93	1,653	8,303
France	3,915	102	143	1,363	5,523
Italy	2,068	131	64	815	3,078
Other Europe	10,316	683	395	3,808	15,202
Total Europe	47,310	3,345	2,195	14,355	67,205
Other	15,898	16,008	3,159	43,887	78,952
Total	259,626	497,498	77,316	591,554	1,425,994

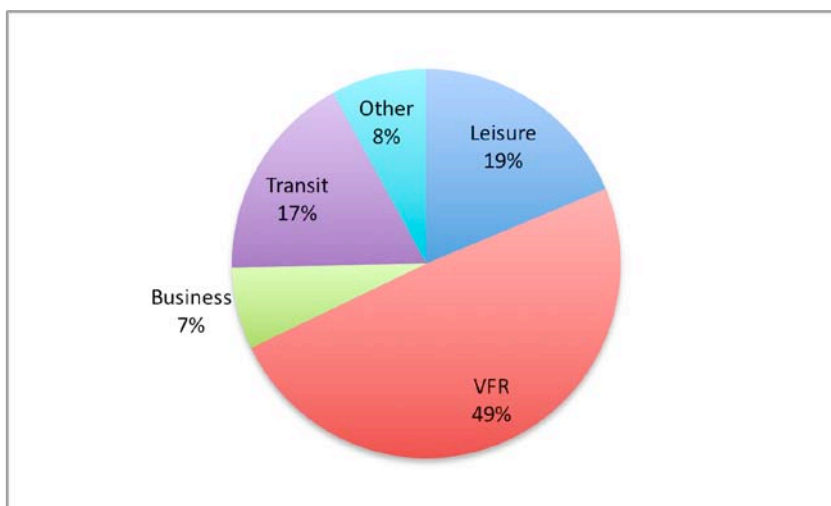
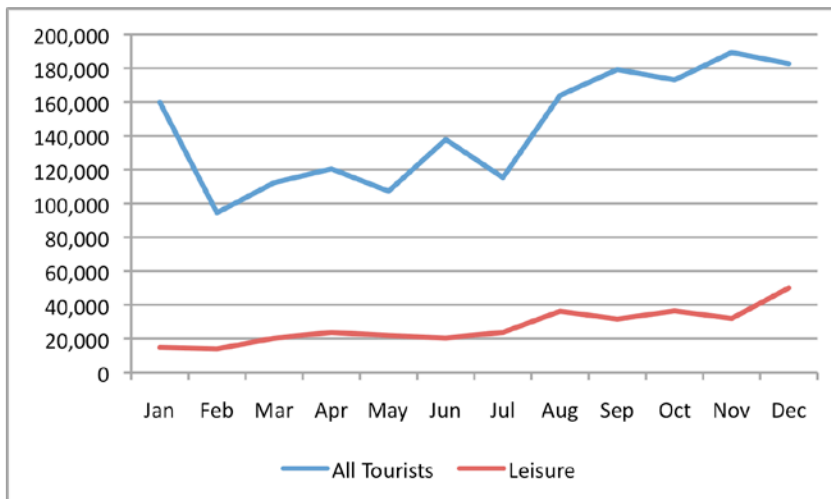
INTERNATIONAL TOURIST ARRIVALS

International Tourist Arrivals: 2007

There were almost 325,000 leisure tourists (18.7% of all arrivals) visiting Botswana in 2007, with the peak month for these tourists being December (50,044 arrivals). Overall, November was the peak month for all types of tourist, with 10.9% of the annual arrivals visiting during that month.

Tourist Arrivals by Purpose of Visit: 2007

Month	Leisure	VFR	Business	Transit	Other	Total	
						Arrivals	%
Jan	14,795	84,108	7,831	30,330	22,810	159,874	9.2
Feb	13,930	36,079	5,564	13,448	25,466	94,487	5.4
Mar	20,314	54,611	8,785	21,061	7,536	112,307	6.5
Apr	23,720	62,436	7,498	23,493	3,344	120,491	6.9
May	21,816	49,771	10,972	18,707	5,981	107,247	6.2
Jun	20,424	75,830	9,937	22,274	9,358	137,823	7.9
Jul	23,734	61,200	11,837	17,176	1,416	115,363	6.6
Aug	36,221	85,853	12,998	24,321	4,519	163,912	9.4
Sep	31,556	85,108	13,229	30,545	18,836	179,274	10.3
Oct	36,425	87,702	11,429	30,266	7,260	173,082	10.0
Nov	31,935	94,457	10,362	24,156	28,415	189,325	10.9
Dec	50,044	76,086	7,714	44,945	3,881	182,670	10.5
Total	324,914	853,241	118,156	300,722	138,822	1,735,855	100.0
%	18.7	49.2	6.8	17.3	8.0	100.0	

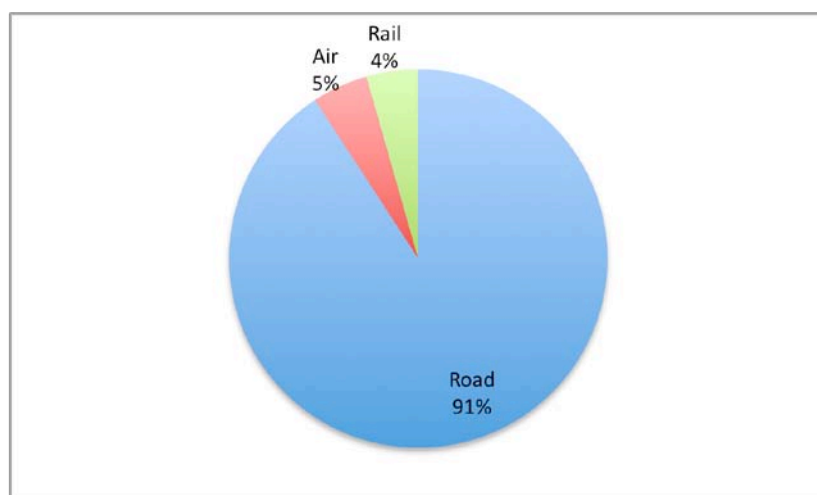


INTERNATIONAL TOURIST ARRIVALS

Tourist Arrivals by Mode of Transport: 2007

Month	Road	Air	Rail	Other	Total	
					Arrivals	%
Jan	148,387	4,667	6,820	0	159,874	9.2
Feb	83,787	5,020	5,670	10	94,487	5.4
Mar	98,372	6,672	7,210	53	112,307	6.5
Apr	107,507	5,084	7,900	0	120,491	6.9
May	91,182	7,894	8,171	0	107,247	6.2
Jun	122,082	7,805	7,910	26	137,823	7.9
Jul	102,991	6,801	5,571	0	115,363	6.6
Aug	151,911	7,201	4,800	0	163,912	9.4
Sep	165,373	8,911	4,990	0	179,274	10.3
Oct	158,040	9,272	5,770	0	173,082	10.0
Nov	174,879	8,483	5,960	3	189,325	10.9
Dec	171,893	4,807	5,970	0	182,670	10.5
Total	1,576,404	82,617	76,742	92	1,735,855	100.0
%	90.8	4.8	4.4	0.0	100.0	

Almost 91% of all tourist arrivals entered Botswana by road, with around 5% visiting by air. The peak month for arrivals by air was October (8,483 arrivals).



INTERNATIONAL TOURIST ARRIVALS

Tourist Arrivals by Country of Residence: 2007

Country of Residence	Leisure	VFR	Business	Other	Total
Africa					
South Africa	120,257	184,244	66,232	187,005	557,738
Zimbabwe	55,327	569,277	27,426	82,746	734,776
Zambia	25,130	36,177	12,379	66,371	140,057
Namibia	6,606	14,596	2,143	67,995	91,340
Swaziland	724	1,150	400	1,604	3,878
Malawi	532	2,242	410	1,150	4,339
Other Africa	3,383	5,991	1,419	3,569	14,357
Total Africa	211,959	813,677	110,409	410,440	1,546,485
Americas					
USA	23,567	1,918	751	2,050	28,286
Canada	3,026	430	164	308	3,928
Other Americas	720	200	54	165	1,139
Total Americas	27,313	2,548	969	2,523	33,353
East Asia/Pacific					
Australia	6,950	669	371	829	8,819
Japan	6,292	180	32	420	6,924
Other EAP	5,082	2,596	667	933	9,278
Total EAP	18,324	3,445	1,070	2,182	25,021
Europe					
United Kingdom	16,225	3,242	1,537	2,121	23,125
Germany	12,408	928	280	2,455	16,071
Netherlands	6,545	601	114	828	8,088
France	5,418	287	144	596	6,445
Italy	3,167	331	55	396	3,949
Other Europe	15,287	1,649	599	2,336	19,871
Total Europe	59,050	7,038	2,729	8,732	77,549
Other	8,268	26,533	2,979	15,667	53,447
Total	324,914	853,241	118,156	439,544	1,735,855

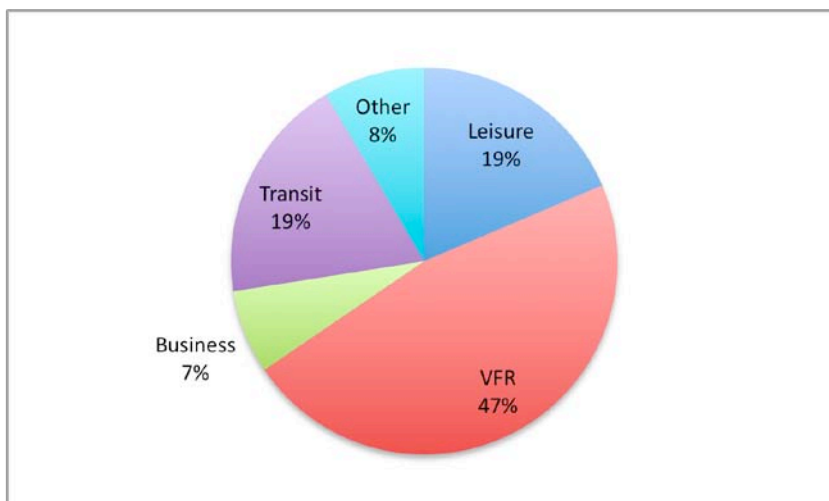
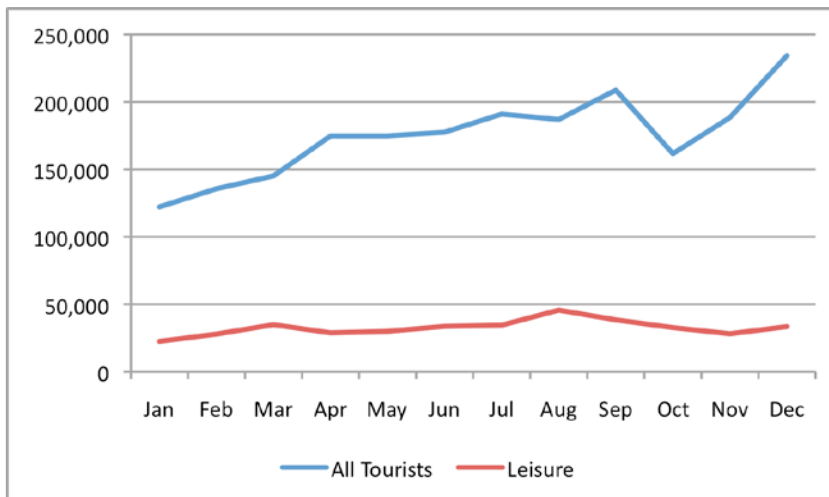
INTERNATIONAL TOURIST ARRIVALS

International Tourist Arrivals: 2008

There were over 390,000 leisure tourists (18.6% of all arrivals) visiting Botswana in 2008, with the peak month for these tourists being August (45,675 arrivals). Overall, December was the peak month for all types of tourist, with 11.2% of the annual arrivals visiting during that month.

Tourist Arrivals by Purpose of Visit: 2008

Month	Leisure	VFR	Business	Transit	Other	Total	
						Arrivals	%
Jan	22,474	58,644	9,947	28,687	2,412	122,164	5.8
Feb	27,906	71,370	9,649	18,123	8,579	135,627	6.5
Mar	34,897	52,408	10,885	35,982	10,950	145,122	6.9
Apr	28,822	99,710	10,599	32,675	2,972	174,778	8.3
May	29,963	67,772	15,805	34,365	26,878	174,783	8.3
Jun	33,664	83,017	18,057	28,488	14,336	177,562	8.5
Jul	34,519	104,610	10,977	33,137	7,719	190,962	9.1
Aug	45,675	75,498	11,141	33,392	21,222	186,928	8.9
Sep	38,461	103,159	13,524	31,003	22,574	208,721	9.9
Oct	32,714	78,404	12,530	29,881	8,082	161,611	7.7
Nov	28,125	88,984	10,318	29,784	31,186	188,397	9.0
Dec	33,461	100,721	13,369	64,516	22,196	234,263	11.2
Total	390,681	984,297	146,801	400,033	179,106	2,100,918	100.0
%	18.6	46.9	7.0	19.0	8.5	100.0	

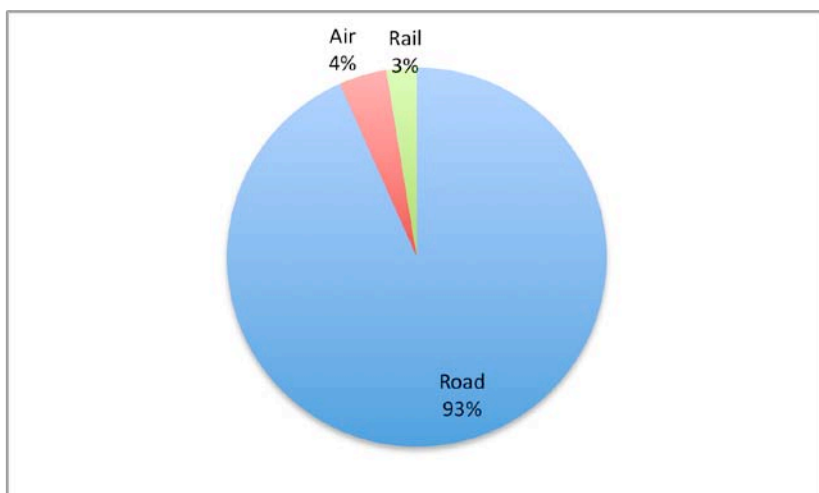


INTERNATIONAL TOURIST ARRIVALS

Tourist Arrivals by Mode of Transport: 2008

Month	Road	Air	Rail	Other	Total	
					Arrivals	%
Jan	110,159	5,995	5,970	40	122,164	5.8
Feb	123,542	5,865	6,210	10	135,627	6.5
Mar	134,510	7,602	3,010	0	145,122	6.9
Apr	161,644	6,744	6,390	0	174,778	8.3
May	160,945	7,748	6,090	0	174,783	8.3
Jun	168,077	9,414	71	0	177,562	8.5
Jul	178,103	7,469	5,390	0	190,962	9.1
Aug	176,084	7,204	3,640	0	186,928	8.9
Sep	195,269	9,515	3,690	247	208,721	9.9
Oct	149,860	6,731	4,730	290	161,611	7.7
Nov	177,001	6,435	4,961	0	188,397	9.0
Dec	225,536	4,727	4,000	0	234,263	11.2
Total	1,960,730	85,449	54,152	587	2,100,918	100.0
%	93.3	4.1	2.6	0.0	100.0	

Over 93% of all tourist arrivals entered Botswana by road, with around 4% visiting by air. The peak month for arrivals by air was September (9,515 arrivals).



INTERNATIONAL TOURIST ARRIVALS

Tourist Arrivals by Country of Residence: 2008

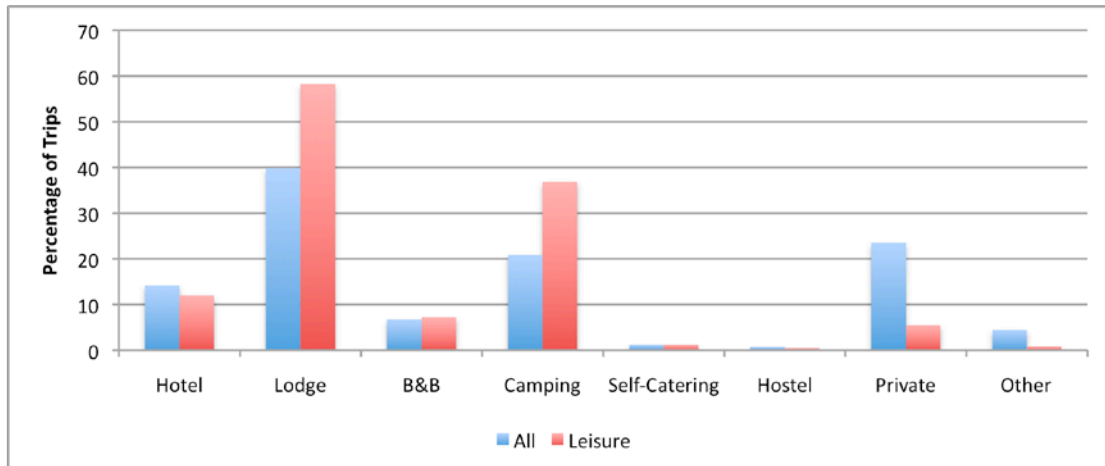
Country of Residence	Leisure	VFR	Business	Other	Total
Africa					
South Africa	122,753	201,091	66,618	204,651	595,113
Zimbabwe	86,557	654,923	42,881	163,800	948,161
Zambia	46,438	82,826	26,078	95,460	250,802
Namibia	6,125	13,847	1,844	89,036	110,852
Swaziland	1,015	1,293	523	1,480	4,311
Malawi	725	2,621	230	1,311	4,887
Other Africa	4,253	6,964	1,955	5,346	18,518
Total Africa	267,866	963,565	140,129	561,084	1,932,644
Americas					
USA	26,624	2,425	1,000	2,237	32,286
Canada	3,843	453	165	430	4,891
Other Americas	1,000	131	20	114	1,265
Total Americas	31,467	3,009	1,185	2,781	38,442
East Asia/Pacific					
Australia	9,373	769	456	705	11,303
Japan	5,938	150	141	170	6,399
Other EAP	6,713	1,998	1,147	833	10,691
Total EAP	22,024	2,917	1,744	1,708	28,393
Europe					
United Kingdom	17,892	3,377	1,314	2,112	24,695
Germany	13,309	1,016	227	2,706	17,258
Netherlands	7,273	476	133	649	8,531
France	6,118	321	383	610	7,432
Italy	3,778	204	70	402	4,454
Other Europe	18,370	1,884	719	2,730	23,703
Total Europe	66,740	7,278	2,846	9,209	86,073
Other	2,584	7,528	897	4,357	15,366
Total	390,681	984,297	146,801	579,139	2,100,918

INTERNATIONAL TOURIST ARRIVALS

Key Trip Characteristics: 2010

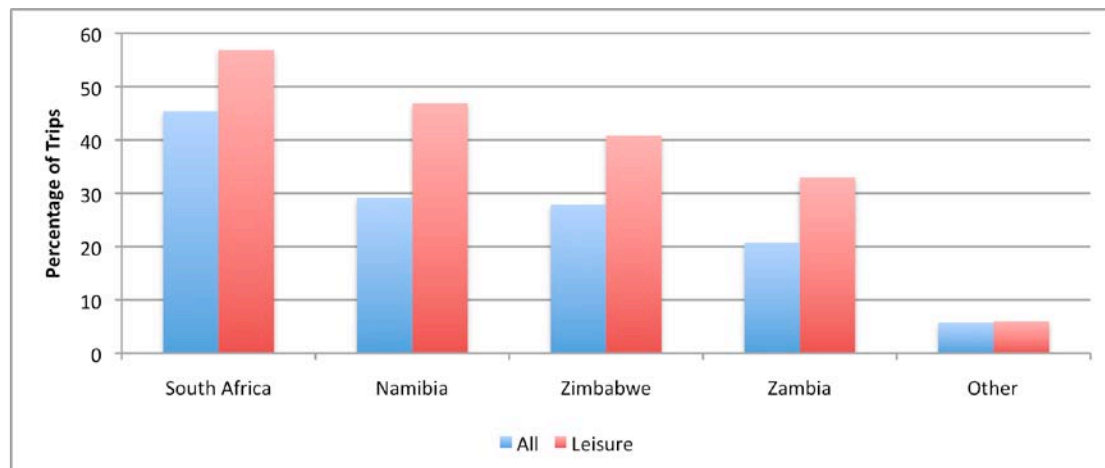
Accommodation used

There is a considerable difference between the types of accommodation used by all tourists (blue), and those used by leisure tourists (red). Over 58% of all leisure tourists stayed in a lodge during their stay in Botswana in 2010 (up from 47% in 2009), and almost 37% camped (up from 30% in 2009).



Other Countries Visited

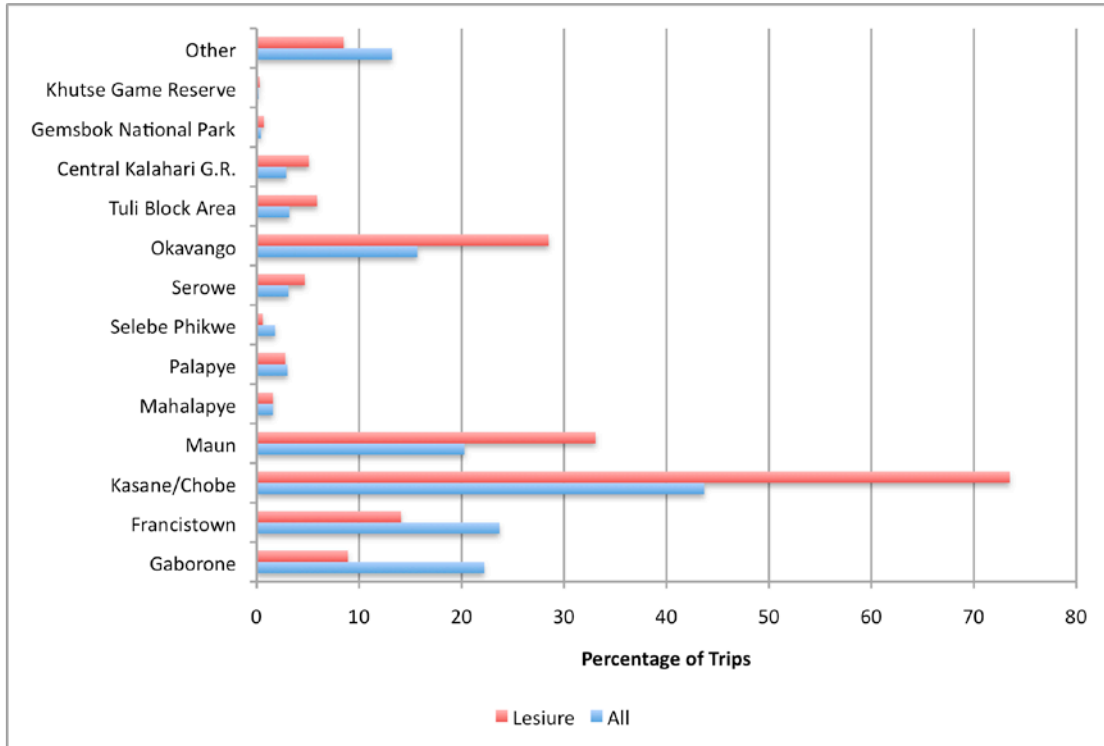
Leisure tourists (red) are more likely to visit other countries as part of their trip than all tourists (blue). Nearly 57% of all leisure tourists visited South Africa as part of their holiday to Botswana (up from 45% in 2009)



INTERNATIONAL TOURIST ARRIVALS

Places Visited

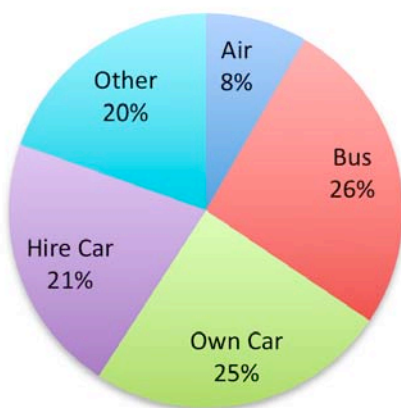
The Kasane/Chobe area was the most visited destination in Botswana by leisure tourists (red), followed by the Okavango. For all tourists (blue), Gaborone and Francistown are the most visited destinations.



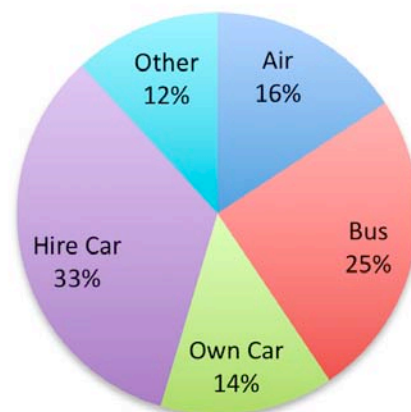
Type of Transport used to Depart Botswana

When compared to all tourists (pie chart on the left), leisure tourists (pie chart on the right) were more likely to visit Botswana using a hire car (33%), and more likely to visit the country by air (16%).

Type of Transport Used: All



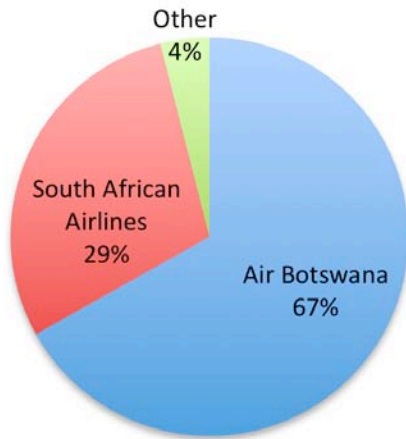
Type of Transport Used: Leisure



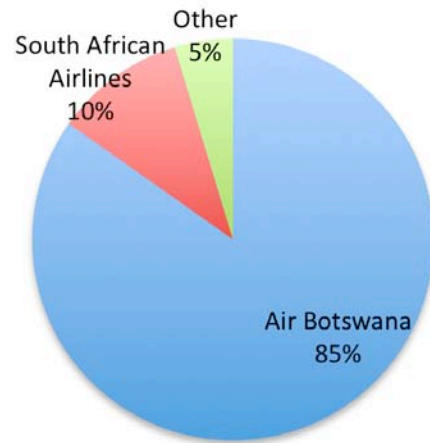
INTERNATIONAL TOURIST ARRIVALS

Leisure tourists were considerably more likely to fly Air Botswana (85%), than all tourists in general.

Airline Used: All



Airline Used: Leisure



Evaluation of Stay

Leisure tourists were more likely to rate their overall trip satisfaction as *Excellent* (64%) than all tourists (50%). In 2009, only 55% of all leisure tourists rated their trip as *Excellent*. This increased to 64% in 2010.

Evaluation of Stay: All



Evaluation of Stay: Leisure



INTERNATIONAL TOURIST ARRIVALS

Key Trip Characteristics: 2007-2010

There has been a sharp increase in the utilisation of lodges by tourists over the period 2007-2010, mainly at the expense of hotels and private accommodation. Camping has also increased in popularity.

Multi-country trips have also increased in popularity, with South Africa gaining the most ground.

Whilst fewer tourists appear to be visiting Gaborone as part of their trip, most other areas are benefiting from increasing numbers of visitors. This is an indication that tourists are travelling more widely whilst in the country.

	2007	2008	2009	2010	Diff. 2007 and 2010
<i>Types of Accommodation Used</i>					
Hotel	22.4	17.6	16.6	14.2	-8.2
Lodge	15.5	17.8	30.1	39.9	24.4
B&B	4.3	3.4	5.8	6.7	2.4
Camping	6.1	5.4	13.5	20.9	14.8
Self-Catering	2.8	2.2	1.8	1.2	-1.6
Hostel	0.4	3.0	0.6	0.7	0.3
Private	49.6	42.5	31.5	23.5	-26.1
Other	3.7	10.3	8.7	4.4	0.7
<i>Other Countries Visited</i>					
South Africa	19.4	37.4	34.8	45.4	26.0
Namibia	11.2	14.6	23.2	29.2	18.0
Zimbabwe	12.6	9.4	22.1	27.9	15.3
Zambia	6.1	20.0	16.1	20.7	14.6
Other	2.6	39.4	13.5	5.7	3.1
<i>Places Visited for at least One Night</i>					
Gaborone	50.9	29.4	32.2	22.2	-28.7
Francistown	22.8	39.6	26.1	23.7	0.9
Kasane/Chobe	11.0	16.7	19.5	43.7	32.7
Maun	5.7	8.5	10.2	20.3	14.6
Mahalapye	1.6	1.7	1.4	1.6	0.0
Palapye	0.9	3.1	3.4	3	2.1
Selebe Phikwe	1.3	2.4	2.2	1.8	0.5
Serowe	1.5	1.9	2.0	3.1	1.6
Okavango	9.1	8.9	11.4	15.7	6.6
Tuli Block	0.0	0.0	1.6	3.2	3.2
Central Kalahari G.R.	1.9	1.4	2.3	2.9	1.0
Gemsbok National Park	0.9	0.2	0.3	0.4	-0.5
Khutse Game Reserve	0.9	0.6	0.6	0.2	-0.7
Other	16.1	15.1	23.9	13.2	-2.9

INTERNATIONAL TOURIST EXPENDITURE

Average Tourist Expenditure per Night: 2006-2010

The average expenditure per tourist per night increased by 37.3% to Pula 589 in 2010.

Year	Spend/Night (Pula)	Change (%)
2006	322	
2007	323	0.3
2008	310	-4.0
2009	429	38.4
2010	589	37.3

Source: DoT RSU Visitor Survey

Visitor Expenditure: 2006 and 2009

Tourist Expenditure: 2006 and 2009

Total tourist expenditure in Botswana has grown by an average of 16.4% per annum over the period 2006 to 2009. Expenditure on accommodation has grown the most (26.6%). There has been a small decline in recreational expenditure.

Type of Spend	Pula (million)		Average Annual Growth (06-09) (%)
	2006	2009	
Accommodation	1,028	2,087	26.6
Food/Drink	277	382	11.3
Transport	258	399	15.6
Recreation	219	205	-2.2
Shopping	403	443	3.2
Other	813	1,207	14.1
Total	2,998	4,723	16.4

Source: DoT RSU TSA Report

Overall, tourists (overnight visitors) spent Pula 4.7 billion in Botswana in 2009, increasing from Pula 3.0 billion in 2006.

INTERNATIONAL TOURIST EXPENDITURE

Day Visitor Expenditure: 2006 and 2009

Expenditure by day visitors has grown by an average annual rate of 19.6% over the period 2006 to 2009. In 2009, a total of Pula 107.8 million was spent in Botswana by day visitors.

Type of Spend	Pula (million)		Average Annual Growth (06-09) (%)
	2006	2009	
Accommodation	1.6	2.7	19.6
Food/Drink	2.1	3.6	20.1
Transport	1.6	2.7	19.6
Recreation	0.3	0.5	16.0
Shopping	39.8	68.1	19.6
Other	17.6	30.2	19.6
Total	63.0	107.8	19.6

Source: DoT RSU TSA Report

Total Visitor Expenditure: 2006 and 2009

Combining tourist and day visitor expenditure provides a total visitor expenditure in Botswana in 2009 of Pula 4.8 billion.

Type of Spend	Pula (million)		Average Annual Growth (06-09) (%)
	2006	2009	
Accommodation	1,030	2,090	26.6
Food/Drink	279	386	11.4
Transport	260	402	15.7
Recreation	219	206	-2.1
Shopping	443	511	4.9
Other	831	1,237	14.2
Total	3,061	4,831	16.4

Source: DoT RSU TSA Report

DOMESTIC TOURISM

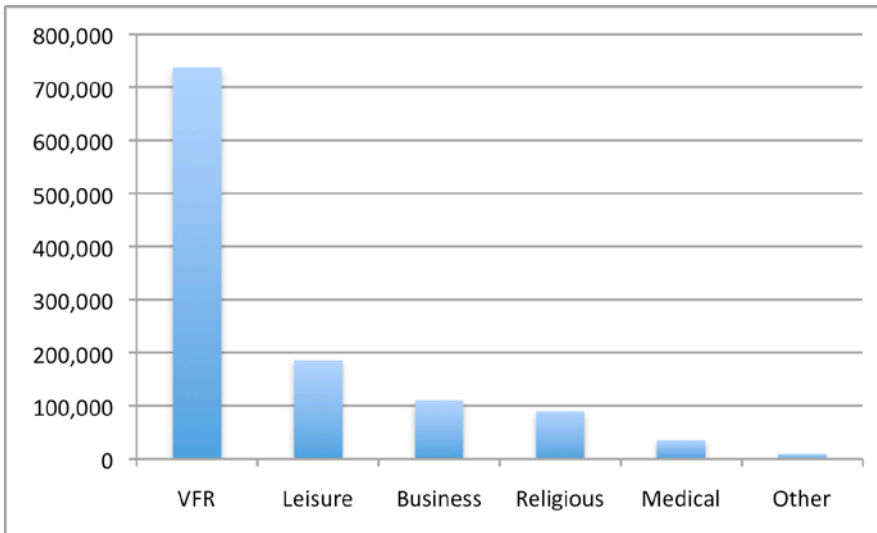
Domestic Trips: 2010

There were a total of 1.2 million domestic overnight trips taken in Botswana in 2010.

Purpose of Visit

Almost two in every three (63.2%) trips were for the purpose of visiting friends or relatives (VFR). Leisure accounted for a further 15.9% trips.

Purpose of Visit	Overnight Trips	%
VFR	737,001	63.2
Leisure	185,416	15.9
Business	109,617	9.4
Religious	89,793	7.7
Medical	34,984	3.0
Other	9,329	0.8
Total	1,166,141	100.0

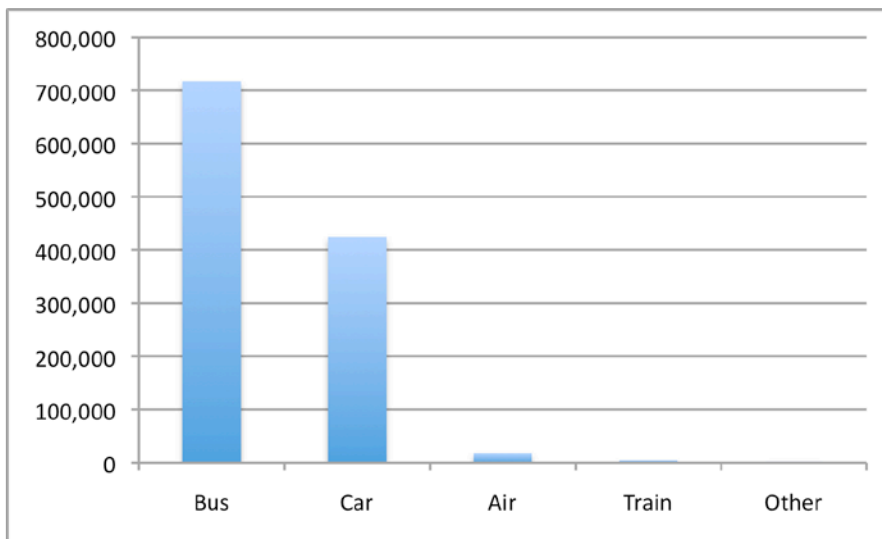


DOMESTIC TOURISM

Mode of Transport

Bus and car are used as the main mode of transport for most overnight domestic trips. In 2010, 61.5% of all trips were taken by bus.

Mode of Transport	Overnight Trips	%
Bus	717,177	61.5
Car	424,475	36.4
Air	17,492	1.5
Train	4,665	0.4
Other	2,332	0.2
Total	1,166,141	100.0

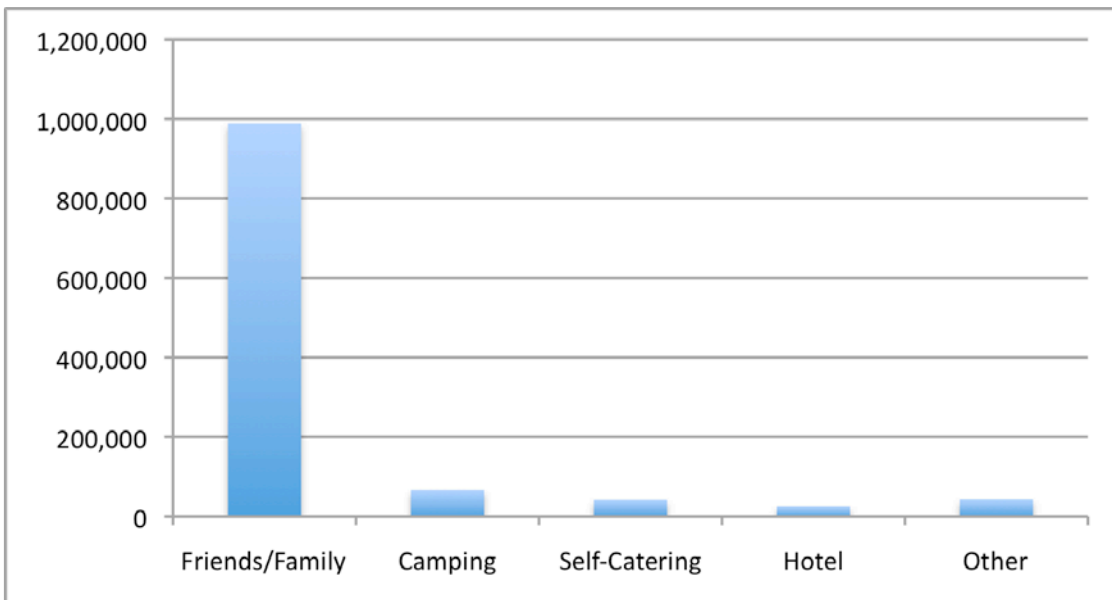


DOMESTIC TOURISM

Type of Accommodation

Non-commercial accommodation (staying with friends and family) dominates the domestic tourism sector. Almost 85% of all overnight domestic tourists stayed with friends/family.

Accommodation	Overnight Trips	%
Friends/Family	988,888	84.8
Camping	66,470	5.7
Self-Catering	41,981	3.6
Hotel	25,655	2.2
Lodge	19,824	1.7
Church	10,495	0.9
Guest House	8,163	0.7
School/Hostel	4,665	0.4
Total	1,166,141	100.0

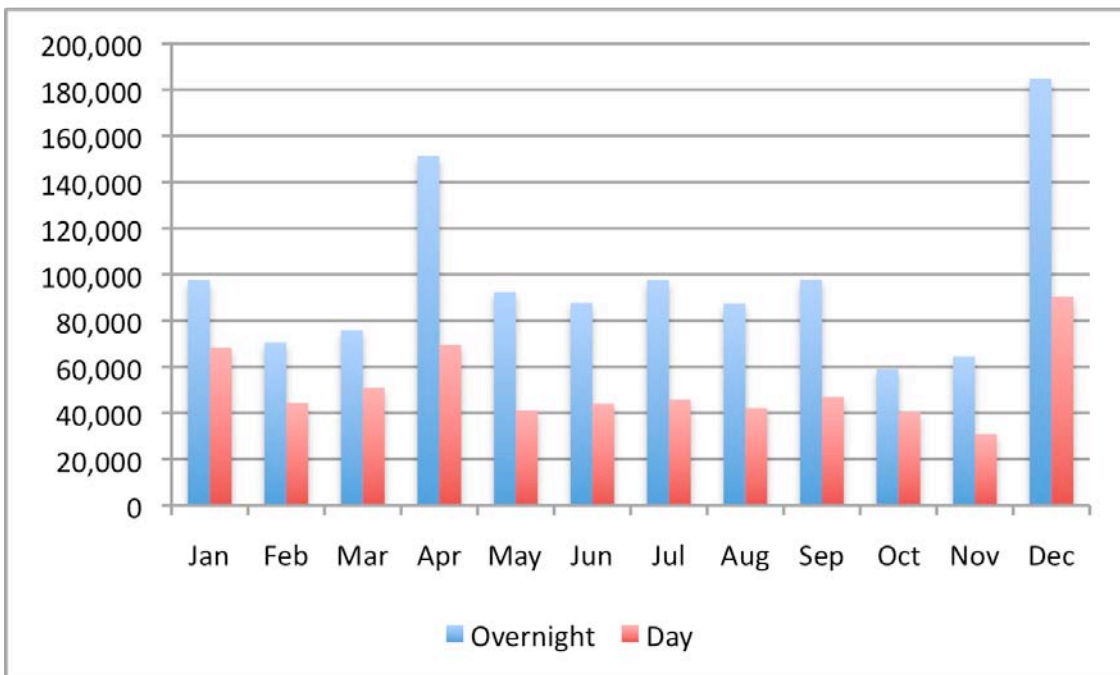


DOMESTIC TOURISM

Seasonality

For overnight domestic tourism, Easter (April in 2010) and Christmas (December) account for almost 29% of all trips. Day visits are less seasonal, although they also peak in these months.

Month	Overnight Trips	%	Day Trips	%
Jan	97,514	8.4	68,293	11.1
Feb	70,505	6.0	44,300	7.2
Mar	75,733	6.5	50,935	8.3
Apr	151,264	13.0	69,500	11.3
May	92,488	7.9	41,083	6.7
Jun	87,662	7.5	44,032	7.2
Jul	97,447	8.4	45,775	7.4
Aug	87,461	7.5	42,156	6.9
Sep	97,648	8.4	46,847	7.6
Oct	59,045	5.1	40,547	6.6
Nov	64,473	5.5	30,963	5.0
Dec	184,841	15.9	90,410	14.7
Total	1,166,141	100.0	614,873	100.0



DOMESTIC TOURISM

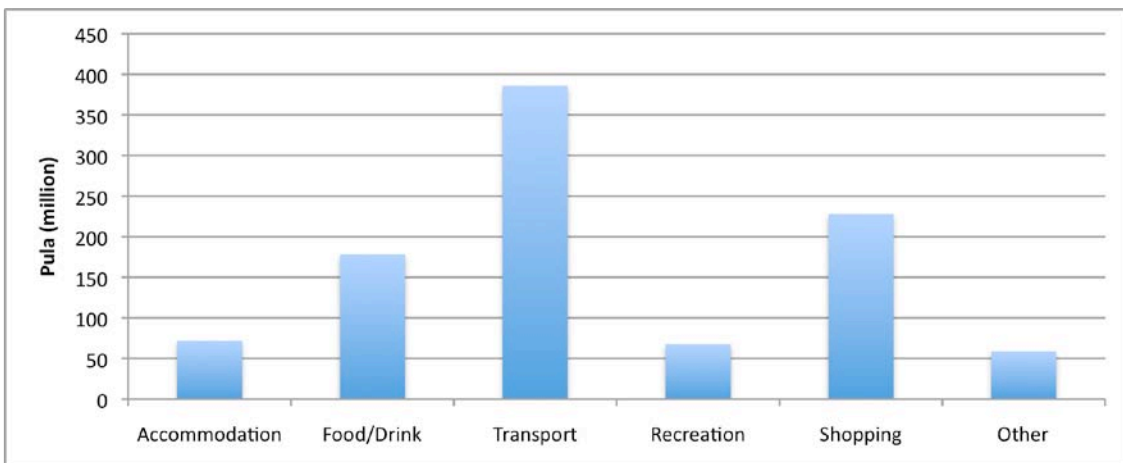
Domestic Trip Expenditure: 2010

Domestic tourists spent a total of Pula 955 million in 2010, with 81% (Pula 801 million) being spent by overnight tourists. A further Pula 36 million was spent by domestic tourists as part of an outbound trip (i.e. travel to the airport, petrol to drive to the border, travel agency fees, etc). Consequently, residents of Botswana spent Pula 991 million on tourism in their own country in 2010.

Type of Visitor	Pula (millions)
Domestic Overnight Trips	801
Domestic Day Trips	154
Domestic Component of Outbound Tourism	36
Total	991

With over four in every five domestic tourists staying with friends and relatives, spend on accommodation only accounts for 7.3% of all expenditure. Transport is the most significant item, accounting for 39% of all spend, followed by shopping at 23%.

Type of Spend	Domestic Night Trips Pula (m)	Domestic Day Trips Pula (m)	Total Domestic Pula (m)	Domestic Part of Out-bound Pula (m)	Total Pula (m)	Share (%)
Accommodation	71	1	72	0	72	7.3
Food/Drink	154	24	178	0	178	18.0
Transport	331	55	386	0	386	39.0
Recreation	30	2	32	36	68	6.9
Shopping	165	63	228	0	228	23.0
Other	50	9	59	0	59	6.0
Total	801	154	955	36	991	100.0



ECONOMIC IMPACT OF TOURISM

In 2007, the Department of Tourism developed a first experimental Tourism Satellite Account (TSA) for Botswana, with the assistance of the Statistics Botswana (then the Central Statistics Office), Bank of Botswana, and the University of Botswana. In 2011 this was updated using data for 2009, drawing on a new domestic tourism survey, up-to-date visitor survey findings, and the latest national accounts statistics.

The 2006 TSA showed that total internal tourism expenditure (international inbound and domestic tourism expenditure) totalled Pula 4.1 billion. The 2009 account showed that this increased by an average of 12.6% per annum over the period 2006-2009, to Pula 5.8 billion.

Tourism value added (the proportion of value added generated by all industries in the provision of goods and services to visitors) was calculated as totalling Pula 2.9 billion in 2009, up from Pula 1.9 billion in 2006 (an average annual growth of 15.1%).

Comparing the Tourism Value Added with Gross Value Added in the National Accounts for 2009 of Pula 78.9 billion shows that the direct contribution of the tourist expenditure is around 3.7% to Botswana's GDP (up from 3% in 2006).

Indirect contribution can vary substantially, and can lie usually anywhere between 25% and 75% of the direct contribution. If this were to apply in Botswana, it might be that the direct and indirect contribution would lie between 4.6% and 6.5%.

	2006	2009
Internal Tourism Expenditure	Pula 4.1 billion	Pula 5.8 billion
Tourism Direct Gross Value Added (TDGVA)	Pula 1.9 billion	Pula 2.9 billion
TDGVA as % of GDP	3.4%	3.7%
Adding the Indirect and Induced Impact of Tourism: TVA as % of GDP	4.2% - 6.0%	4.6% - 6.5%

ACCOMMODATION PERFORMANCE

Key Accommodation Indicators: 2005 to 2010

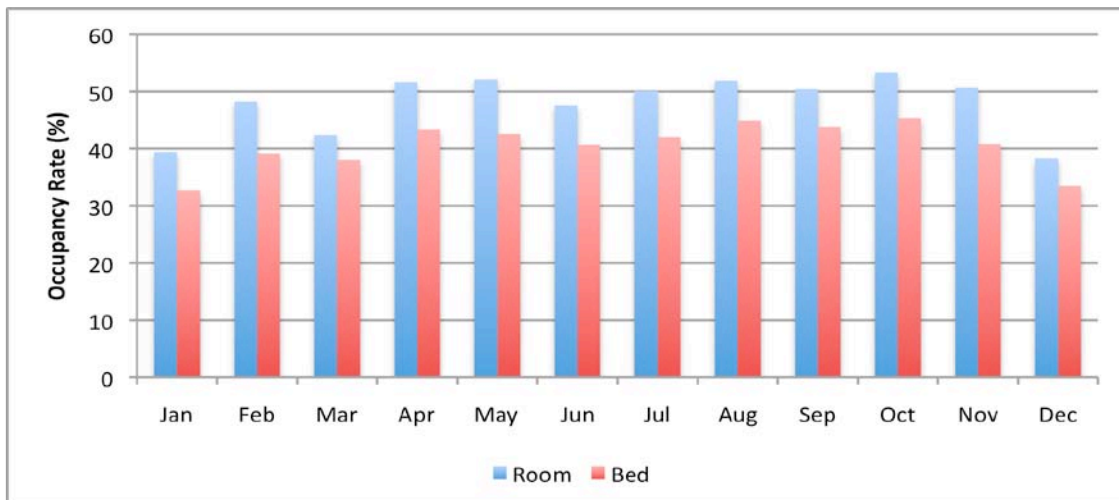
The overall room occupancy rate for accommodation establishments in 2010 was 48.1%, a small decrease from 49.3% in 2009. The average length of stay in an accommodation establishment was 2.2 nights.

Year	Room Occupancy Rate (%)	Bed Occupancy Rate (%)	Average Length of Stay (nights)	Average Guests/Room
2005	41.5	36.0	2.5	1.7
2006	54.4	43.9	2.1	1.6
2007	35.6	27.2	2.0	1.3
2008	41.1	36.1	2.6	1.5
2009	49.3	44.2	2.7	1.5
2010	48.1	40.7	2.2	1.5

Key Accommodation Indicators by Month: 2010

There is not a strong seasonality pattern in the accommodation sector, although in 2010 there was a difference of 15% between the highest room occupancy rate in October of 53.3% and the lowest room occupancy rate in December of 38.3%.

Month	Room Occupancy Rate (%)	Bed Occupancy Rate (%)	Average Length of Stay (nights)	Average Guests/Room
January	39.4	32.7	2.5	1.4
February	48.2	39.1	2.6	1.4
March	42.4	38.0	2.2	1.6
April	51.6	43.3	2.5	1.5
May	52.1	42.6	2.4	1.4
June	47.6	40.7	2.3	1.5
July	50.1	42.0	2.2	1.4
August	51.9	44.9	2.1	1.5
September	50.4	43.8	2.2	1.5
October	53.3	45.3	2.2	1.5
November	50.7	40.8	2.1	1.4
December	38.3	33.5	1.9	1.5
Total	48.1	40.7	2.2	1.5



ACCOMMODATION PERFORMANCE

Key Accommodation Indicators by Region: 2010

The South East region achieved the highest room occupancy rate in 2010, at 53.5%. The longest average length of stay of guests was in Chobe and Ngamiland, at 2.5 nights

Region	Room Occupancy Rate (%)	Bed Occupancy Rate (%)	Average Length of Stay (nights)	Average Guests/Room
Chobe	49.8	45.2	2.5	1.9
Ngamiland	49.6	46.6	2.5	1.8
Central	46.2	36.3	2.0	1.2
Ghanzi	43.5	40.5	2.3	1.7
Kgalagadi	50.4	44.4	2.2	1.3
Kweneng	36.0	30.7	1.8	1.4
North East	45.3	38.3	1.9	1.4
South East	53.5	41.8	2.3	1.3
Southern	38.7	28.8	2.2	1.3
Total	48.1	40.7	2.2	1.5

Accommodation Employment: 2010

The average number of employees per accommodation room was calculated at 1.48 in 2010. Based on a total stock of 6,693 rooms in Botswana it is estimated that there are over 9,800 employees in the accommodation sector, up from 7,000 in 2008.

2010	Employees
Botswana Nationals	
Male	4,016
Female	5,354
Total	9,370
Foreign Nationals	
Male	335
Female	134
Total	469
Total Employees	9,839

Accommodation Turnover: 2008-2010

In 2010, total room revenue per available room was calculated at Pula 532, with a total turnover per available room being Pula 1,061. The difference of Pula 429 represents additional expenditure by guests in addition to the cost of the room (such as meals, drinks, laundry, telephone). The average salary per available room was calculated at Pula 133.

	Room Revenue per Available Room (Pula)	Total Turnover per Available Room (Pula)	Average Salary per Available Room (Pula)
2008	367	498	88
2009	431	660	149
2010	532	1,061	133



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