
TOURISM STATISTICS 2006-2009

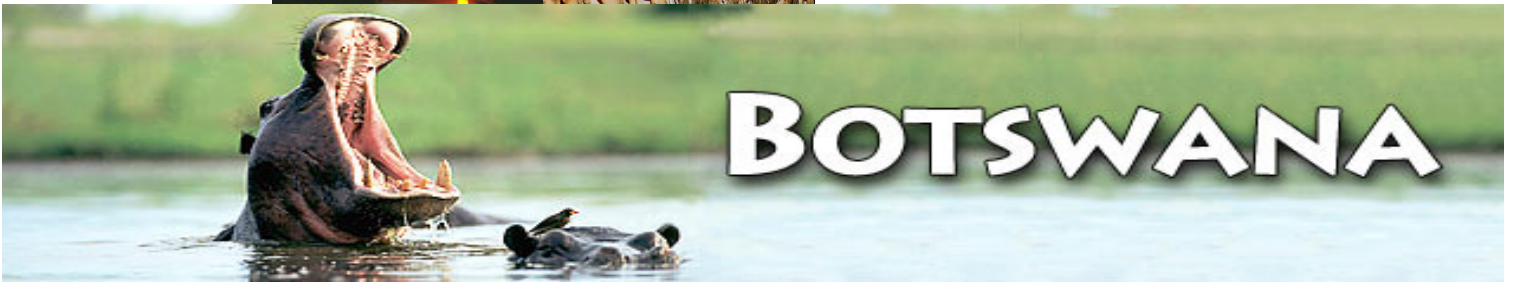
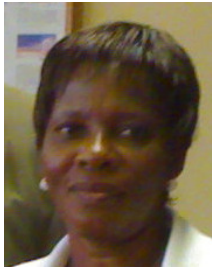


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FOREWORD



For some time we have known that tourism is important for Botswana. However, recently we highlighted the key areas that benefit from this huge industry, and why *tourism works*.

Tourism works for entrepreneurs: there are tourism business opportunities for individuals and communities. These include tour guides, moroko polers, cultural villages, safari companies and lodges.

Tourism works for prosperity: tourism earns foreign exchange, diversifies the economy, stimulates local commerce, increases government revenues, creates employment and promotes international understanding.

Tourism works for the environment: tourism is important to the environment because it helps in environmental protection. Today, many areas in Botswana are protected for conservation and tourism use.

Tourism works for heritage: tourism promotes preservation and revival of heritage such as historical sites, culture, craft production, traditional food and traditional dance.

However, it is important to know just how well tourism is *working*. For that reason, over the last few years we have put in place a system of tourism statistics that enables us to measure tourism. This includes the measuring of tourist arrivals in the country, the utilisation of accommodation establishments such as hotels and lodges, how much tourists are spending, their specific destinations in Botswana, and for the first time ever, the measurement of domestic tourism – how much residents of Botswana spend on tourism within the country. This Domestic Tourism Survey, which was done through collaboration with the Central Statistics Office, is in progress and results will be available mid 2010.

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 traveller.

Whilst this report provides a statistical presentation of key tourism statistics up to September 2009, our work is ongoing, and we will endeavour to publish and make available the most up-to-date tourism statistics for both the public and private sectors. We compile all our data on a powerful database that enables us to respond to individual requests for data when required.

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.

A handwritten signature in black ink, appearing to read 'Kelebaone Gloria Maselesele', 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)

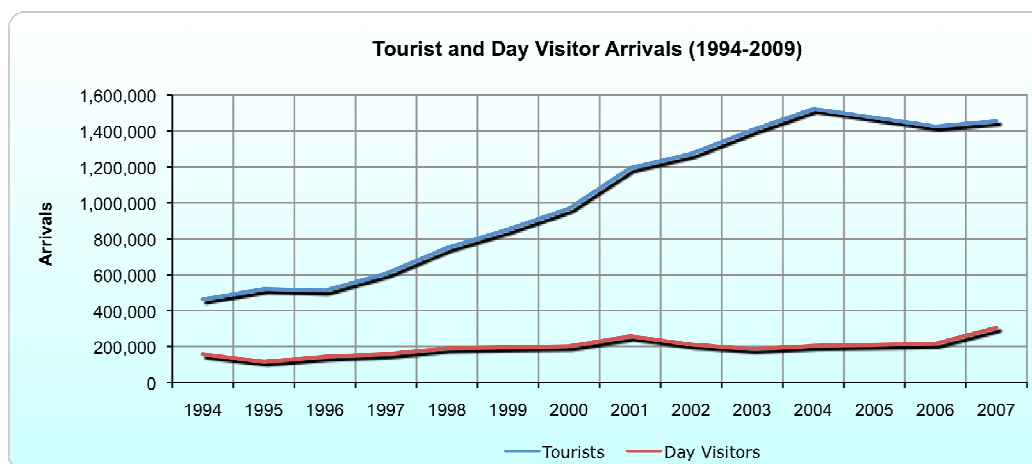
STATISTICAL SUMMARY FOR 2008

International Tourist Arrivals	1,499,794
Average Annual Growth Rate: Tourist Arrivals 2006-2008	2.6%
Average Length of Stay (nights)	7.7
International Tourist Expenditure (pula)	2.9 billion
Average Spend per Person per Night (pula)	341
Room Occupancy Rate	40.3%
Bed Occupancy Rate	36.1%
Average Length of Stay in Accommodation (nights)	2.7
Visits to National Parks (2007)	284,501

INTERNATIONAL TOURIST ARRIVALS

International Tourist Arrivals: 1994-2009

There were an estimated 1.5 million tourist arrivals in Botswana in 2008. The growth of tourist arrivals since 1994 has averaged 8.4% per annum, although since 2004 there has been little increase in arrivals.



Day visitors accounted for an estimated 314,436 arrivals in 2008. The growth of day visitors over the period since 1994 has been lower than for tourists, averaging 5% 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	11.0	195,728	1,027,603
2000	923,250	11.0	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	1,455,151	2.0	305,278	1,760,429
2008*	1,499,794	3.1	314,436	1,814,230
2009*	1,552,611	3.5	323,869	1,876,480
Average Annual Growth Rate (%)	8.4%		5.0%	7.7%

International Tourist Arrivals by Purpose of Visit, 2001-2009

Leisure tourists account for around 18% of all tourist arrivals, with VFR being the most significant purpose of visit segment almost 54%. VFR visitors stay longer than other types of tourist, averaging 10 nights per trip.

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 ⁽¹⁾⁽²⁾	257,145	780,931	84,800	244,187	88,088	1,455,151
2008 ⁽¹⁾	263,574	804,359	86,496	256,396	88,969	1,499,794
Forecast 2009⁽¹⁾	272,799	832,511	88,226	269,216	89,859	1,552,611
Share (%) 2009	17.6	53.6	5.7	17.3	5.8	100.0
Length Stay 2009	7.60	10.00	5.96	3.55	5.78	7.60

Notes: (1) Forecast

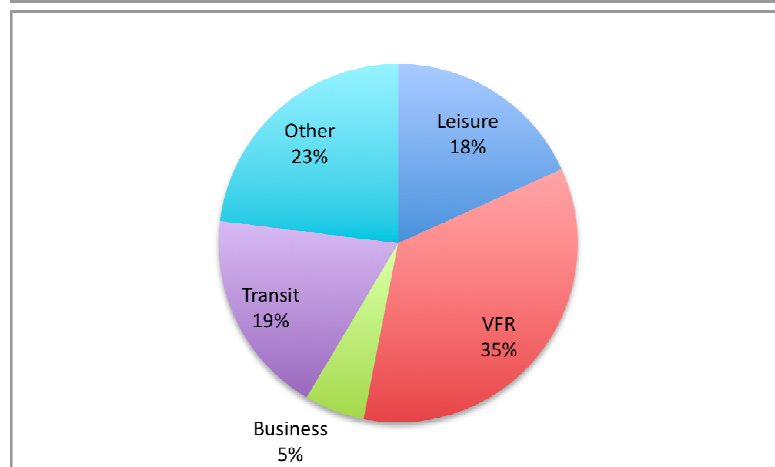
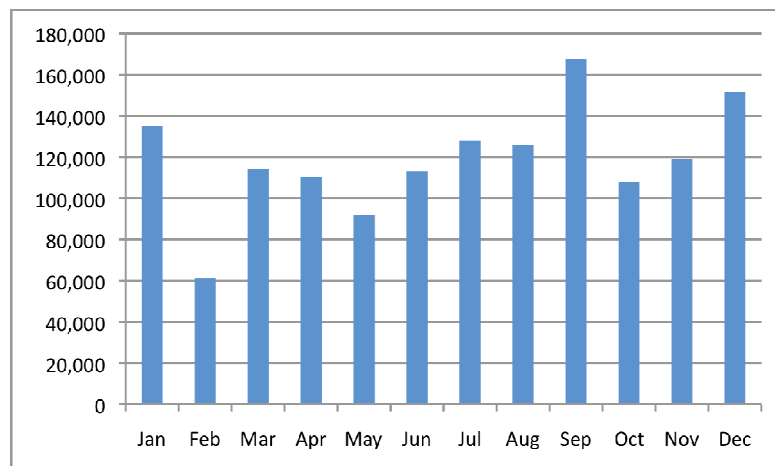
(2) In 2007, a large number of arrivals previously assigned as "Other" were classified as "VFR"

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	



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).

Tourist Arrivals by Country of Residence, 2006

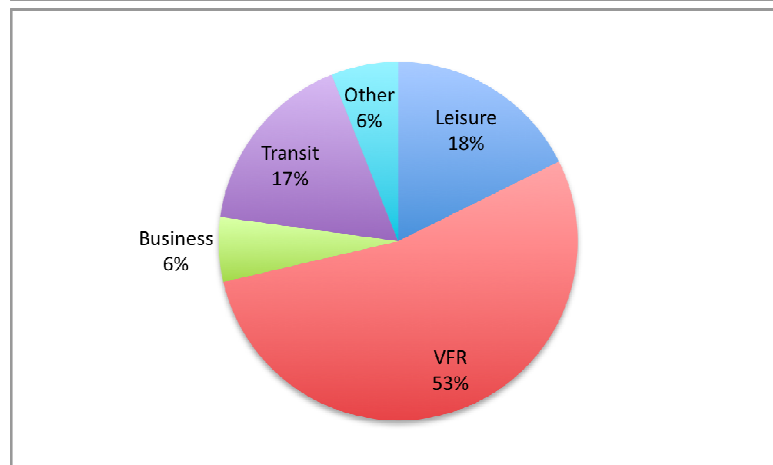
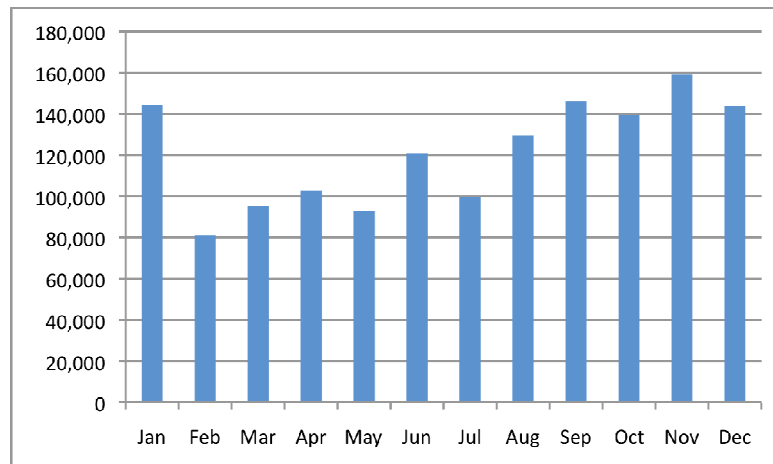
Country of Residence	Leisure	VFR	Business	Other	Total
Africa					
South Africa	113,669	108,856	48,939	244,865	516,329
Zimbabwe	31,728	337,716	13,495	116,930	499,869
Zambia	13,010	15,639	4,834	92,718	126,201
Namibia	5,461	8,279	1,732	63,058	78,530
Swaziland	976	731	310	1,443	3,460
Malawi	372	1,110	221	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: 2007

There were just over 257,000 leisure tourists (17.7% of all arrivals) visiting Botswana in 2007, with the peak month for these tourists being December (32,786 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	12,821	80,459	6,068	25,771	19,187	144,306	9.9
Feb	11,595	34,274	4,212	10,683	20,434	81,198	5.6
Mar	17,089	51,921	6,575	16,806	2,933	95,324	6.6
Apr	17,528	58,476	5,750	18,901	2,056	102,711	7.1
May	18,866	46,314	8,960	15,591	3,237	92,968	6.4
Jun	19,234	72,216	7,198	18,596	3,519	120,763	8.3
Jul	19,832	56,295	9,489	13,146	994	99,756	6.9
Aug	27,478	72,871	8,588	18,757	1,906	129,600	8.9
Sep	27,042	80,756	8,980	25,146	4,177	146,101	10.0
Oct	28,048	73,384	7,296	25,363	5,286	139,377	9.6
Nov	24,826	83,933	7,027	20,300	22,987	159,073	10.9
Dec	32,786	70,032	4,657	35,127	1,372	143,974	9.9
Total	257,145	780,931	84,800	244,187	88,088	1,455,151	100.0
	17.7	53.7	5.8	16.8	6.1	100.0	



Tourist Arrivals by Mode of Transport, 2007

Month	Road	Air	Rail	Other	Total	
					Arrivals	%
Jan	133,820	3,736	6,750	0	144,306	9.9
Feb	71,867	3,721	5,600	10	81,198	5.6
Mar	82,527	5,574	7,180	43	95,324	6.6
Apr	90,570	4,291	7,850	0	102,711	7.1
May	78,199	6,658	8,111	0	92,968	6.4
Jun	106,066	6,791	7,900	6	120,763	8.3
Jul	88,489	5,726	5,541	0	99,756	6.9
Aug	119,107	5,753	4,740	0	129,600	8.9
Sep	133,367	7,744	4,990	0	146,101	10.0
Oct	126,037	7,610	5,730	0	139,377	9.6
Nov	145,806	7,334	5,930	3	159,073	10.9
Dec	134,365	3,729	5,880	0	143,974	9.9
Total	1,310,220	68,667	76,202	62	1,455,151	100.0
%	90.0	4.7	5.2	0.0	100.0	

Exactly 90% of all tourist arrivals entered Botswana by road, with around 5% visiting by air. The peak month for arrivals by air was September (7,744 arrivals).

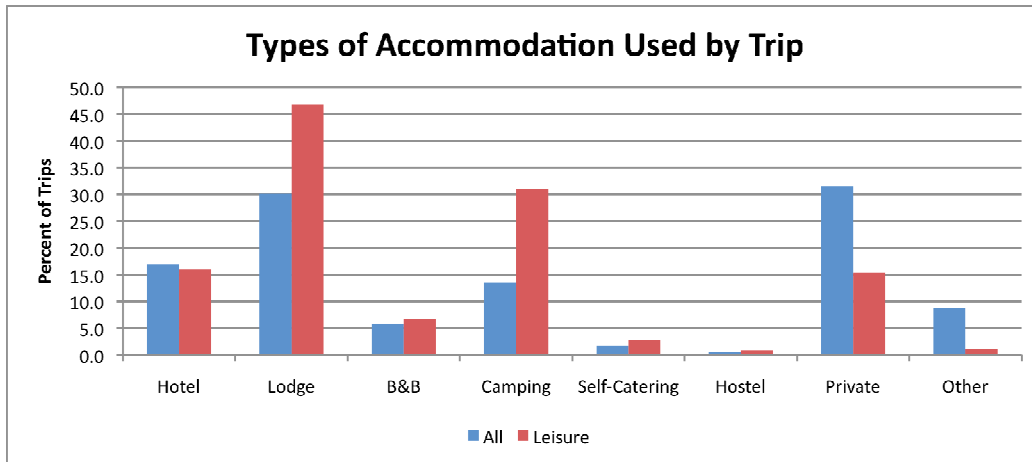
Tourist Arrivals by Country of Residence, 2007

Country of Residence	Leisure	VFR	Business	Other	Total
Africa					
South Africa	102,843	164,876	52,396	159,358	479,473
Zimbabwe	41,102	541,930	17,586	51,674	652,292
Zambia	8,076	19,025	5,225	48,266	80,592
Namibia	4,889	11,207	1,269	46,933	64,298
Swaziland	694	1,100	390	1,503	3,687
Malawi	462	2,001	400	1,040	3,903
Other Africa	3,053	5,400	1,287	3,246	12,986
Total Africa	161,119	745,539	78,553	312,020	1,297,231
Americas					
USA	21,009	1,737	624	1,398	24,768
Canada	2,634	359	125	219	3,337
Other Americas	677	159	54	94	984
Total Americas	24,320	2,255	803	1,711	29,089
East Asia/Pacific					
Australia	6,396	588	336	597	7,917
Japan	2,341	90	20	390	2,841
Other EAP	2,512	1,019	304	470	4,305
Total EAP	11,249	1,697	660	1,457	15,063
Europe					
United Kingdom	14,046	2,914	1,295	1,435	19,690
Germany	11,635	843	208	1,180	13,866
Netherlands	6,183	567	103	659	7,512
France	4,636	256	114	402	5,408
Italy	2,787	310	55	282	3,434
Other Europe	14,107	1,553	567	1,422	17,649
Total Europe	53,394	6,443	2,342	5,380	67,559
Other	7,063	24,997	2,442	11,707	46,209
Total	257,145	780,931	84,800	332,275	1,455,151

Key Trip Characteristics: 2009

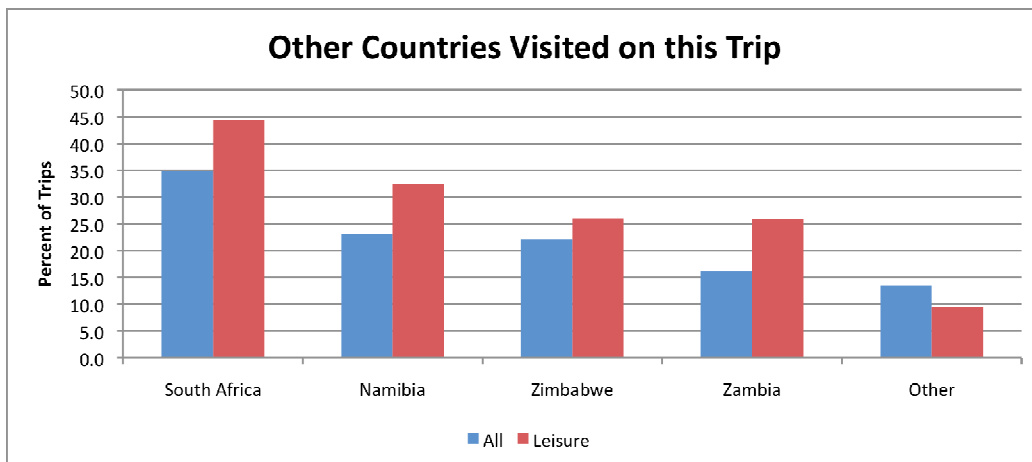
Accommodation used

There is a considerable difference between the types of accommodation used by all tourists (blue), and those used by leisure tourists (red). Almost 47% of all leisure tourists stay in a lodge during their stay in Botswana, and over 30% camp during their trip.



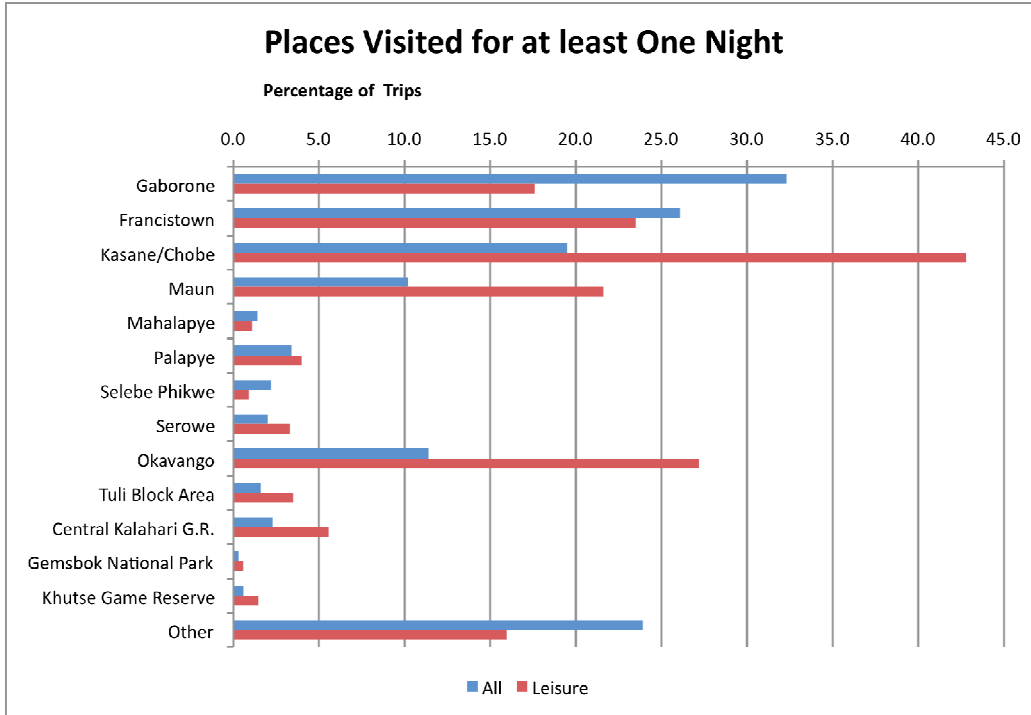
Other Countries Visited

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



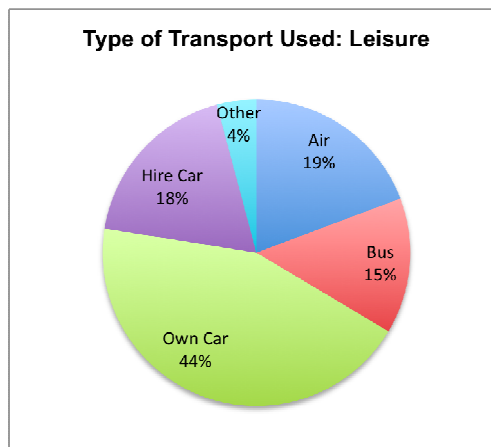
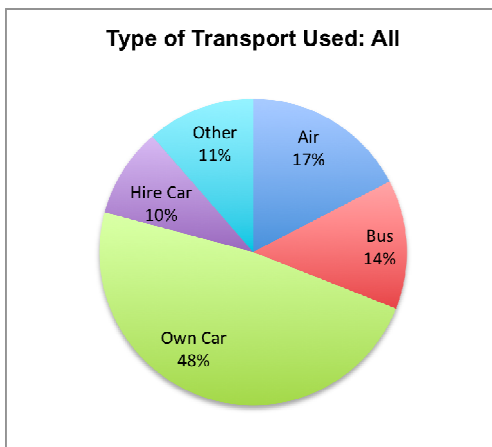
Places Visited

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.

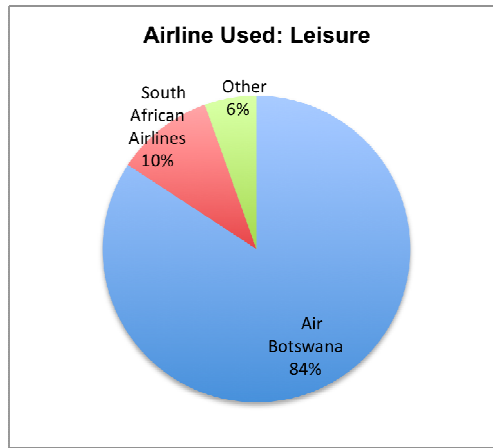
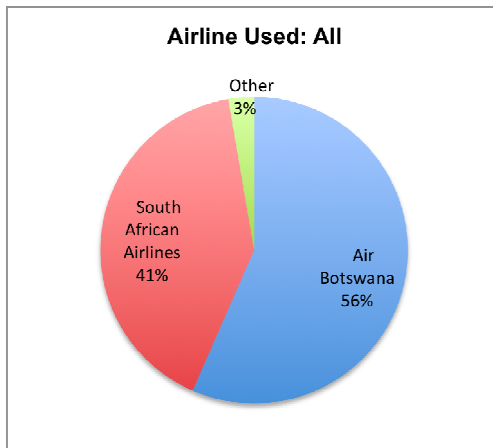


Type of Transport used to Depart Botswana

When compared to all tourists (pie chart on the left), leisure tourists (pie chart on the right) are more likely to visit Botswana using a hire car (18%), and slightly more likely to visit the country by air (20%) and bus (14%).

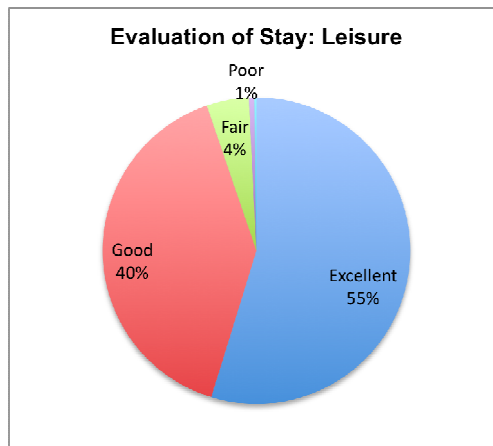
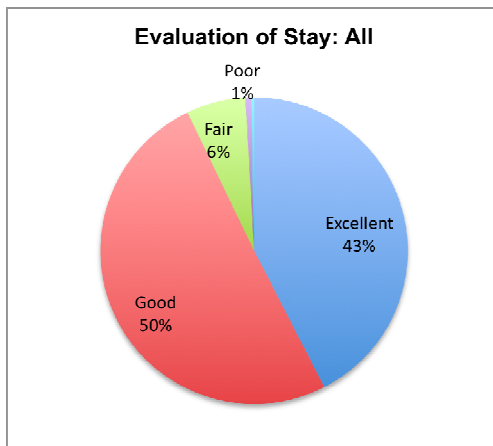


Leisure tourists are considerably more likely to fly Air Botswana (84%), than all tourists in general.



Evaluation of Stay

Leisure tourists rated their overall trip satisfaction as *Excellent* (55%) than all tourists.



Key Trip Characteristics: 2007-2009

There has been a sharp increase in the utilisation of lodges by tourists over the period 2007-2009, 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. As tourist arrivals into the country did not increase over the period 2007-2009, it would appear that tourists are travelling more widely whilst in the country.

	2007	2008	2009	Difference 2007-2009
Types of Accommodation Used				
Hotel	22.4	17.6	16.6	-5.8
Lodge	15.5	17.8	30.1	14.6
B&B	4.3	3.4	5.8	1.5
Camping	6.1	5.4	13.5	7.4
Self-Catering	2.8	2.2	1.8	-1.0
Hostel	0.4	3.0	0.6	0.2
Private	49.6	42.5	31.5	-18.1
Other	3.7	10.3	8.7	5.0
Other Countries Visited				
South Africa	19.4	37.4	34.8	15.4
Namibia	11.2	14.6	23.2	12.0
Zimbabwe	12.6	9.4	22.1	9.5
Zambia	6.1	20.0	16.1	10.0
Other	2.6	39.4	13.5	10.9
Places Visited for at least One Night				
Gaborone	50.9	29.4	32.2	-18.7
Francistown	22.8	39.6	26.1	3.3
Kasane/Chobe	11.0	16.7	19.5	8.5
Maun	5.7	8.5	10.2	4.5
Mahalapye	1.6	1.7	1.4	-0.2
Palapye	0.9	3.1	3.4	2.5
Selebe Phikwe	1.3	2.4	2.2	0.9
Serowe	1.5	1.9	2.0	0.5
Okavango	9.1	8.9	11.4	2.3
Tuli Block	0.0	0.0	1.6	1.6
Central Kalahari G.R.	1.9	1.4	2.3	0.4
Gemsbok National Park	0.9	0.2	0.3	-0.6
Khutse Game Reserve	0.9	0.6	0.6	-0.3
Other	16.1	15.1	23.9	7.8

INTERNATIONAL TOURIST EXPENDITURE

Tourist Expenditure: 2007-2009

Year ⁽¹⁾	Tourist Arrivals	Spend/Night (P)	Total Spend (Pm)	Growth Rate %
2007	1,455,151	321	2,551	
2008 ⁽²⁾	1,499,794	341	2,943	15.4
2009 ⁽²⁾	1,552,611	392	2,943	0.0

Notes: (1) Visitor Survey methodology changed in 2007. Therefore comparisons with data from previous years are not possible.
 (2) Forecast – length of stay data for 2007 is applied to years 2008 and 2009 as part of the forecast procedure.

Tourist Expenditure: 2009

Based on the 2009 Visitor Expenditure Survey and the forecasts for tourist arrivals in 2009, it is estimated that total tourist expenditure is Pula 2,943 million. Of this 34.5% was spent on accommodation, and 16.9% on shopping.

Comparing 2009 with 2008 shows a considerable increase in expenditure on accommodation, and also increases in expenditure on meals/drinks and recreation. By contrast there has been a large decline in shopping.

Total Spend by Type of Expenditure, 2009

Type of Spend	2007 Pula (m)	2008 Pula (m)	2009 Pula (m)	% Change 2008-2009
Accommodation	702	608	1,014	66.8
Meals/Drinks	200	291	352	21.0
Transport	335	448	425	-5.1
Recreation	77	78	107	37.2
Shopping	199	904	499	-44.8
Other	1,038	615	546	-11.2
Total	2,551	2943	2,943	0.0

Leisure tourism accounted for around one-third (32.7%), or nearly Pula 1 billion, of total tourist expenditure in 2009. VFR tourism accounted for 42.8% of all expenditure.

Total Spend by Purpose of Visit, 2009

Type of Spend	2007 Pula (m)	2008 Pula (m)	2009 Pula (m)	% Change 2008-2009
Leisure	1,172	973	964	-0.9
VFR	874	1,136	1,259	10.8
Business	239	253	255	0.8
Transit	174	425	349	-17.9
Other	93	156	116	-25.6
Total	2,551	2,943	2,943	0.0

The average spend per tourist per night in 2009 was Pula 392, with business tourists spending the most (per night) – Pula 486. Leisure tourists were the second highest spenders with Pula 465.

Average Spend per Tourist per Night, 2009

	Leisure (Pula)	VFR (Pula)	Business (Pula)	Transit (Pula)	Other (Pula)	All (Pula)
Accommodation	248	26	269	110	71	194
Meals/Drinks	21	25	70	52	22	29
Transport	56	26	36	64	26	47
Recreation	13	8	8	4	14	11
Shopping	26	42	43	41	61	34
Other	98	25	59	94	30	76
Total	465	151	486	365	223	392

Amongst the African markets, tourists from Namibia spent more than those from South Africa (Pula 474 compared with Pula 358). Zimbabwean tourists spent an average of Pula 235 per night.

Tourists from the United States spent Pula 1,178 per night, with those from the United Kingdom spending Pula 1,011, and Australia spending Pula 880. Tourists from Germany were recorded as spending only Pula 248 per night, although this appears surprisingly low and should be used with caution.

Average Spend per Tourist per Night: Main African Markets 2009

	Namibia (Pula)	RSA (Pula)	Zimbabwe (Pula)
Accommodation	240	174	30
Meals/Drinks	54	34	29
Transport	46	33	29
Recreation	5	12	4
Shopping	27	16	126
Other	102	89	17
Total	474	358	235

Average Spend per Tourist per Night: Main Other Markets, 2009

	USA (Pula)	UK (Pula)	Australia (Pula)	Germany (Pula)	Other (Pula)
Accommodation	628	655	510	124	371
Meals/Drinks	47	39	36	18	47
Transport	156	167	77	28	84
Recreation	17	35	30	5	24
Shopping	34	27	23	4	29
Other	296	87	205	69	94
Total	1,178	1,011	880	248	649

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 Central Statistics Office, Bank of Botswana, and the University of Botswana. An updated TSA will be developed and published in 2010 drawing on a new domestic tourism survey, up-to-date visitor survey findings, and the latest national accounts statistics.

The 2007 TSA showed that total internal tourism expenditure (international inbound and domestic tourism expenditure) totalled Pula 4.1 billion.

Tourism value added (the proportion of value added generated by all industries in the provision of good and services to visitors) was calculated as totalling Pula 1.9 billion.

Comparing this with Gross Value Added in the National Accounts for 2005/2006 of Pula 54.8 billion show that the direct contribution of the tourist expenditure is around 3.4% to Botswana's GDP.

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 4.2% and 6.0%.

Estimated Metrics: 2005/2006	
Internal Tourism Expenditure	Pula 4.1 billion
Tourism Direct Gross Value Added (TDGVA)	Pula 1.9 billion
	As % of GDP
TDGVA as % of GDP	3.4%
Adding Indirect	
Adding the Indirect Impact: TVA as % of GDP	4.2% - 6.0%

ACCOMMODATION PERFORMANCE

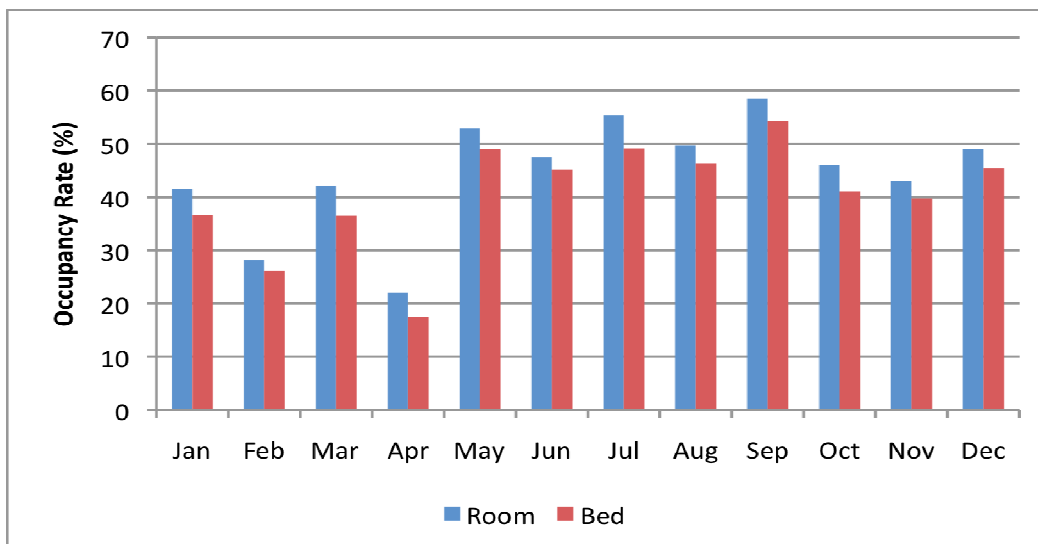
Key Accommodation Indicators: 2005 to 2008

The overall room occupancy rate for accommodation establishments in 2008 was 40.3%, increasing from 35.6% in 2007. The bed occupancy rate also rose, from 27.1% to 36.1%, as did the average length of stay (2.0 nights to 2.7 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	40.3	36.1	2.7	1.5

Key Accommodation Indicators by Month: 2008

Month	Room Occupancy Rate (%)	Bed Occupancy Rate (%)	Average Length of Stay (nights)	Average Guests/Room
January	41.6	36.6	2.9	1.5
February	28.2	26.1	3.1	1.3
March	42.1	36.5	2.6	1.5
April	22.0	17.6	2.8	1.5
May	52.9	49.0	3.3	1.5
June	47.5	45.2	2.7	1.6
July	55.5	49.1	2.7	1.5
August	49.7	46.4	2.0	1.6
September	58.5	54.3	2.8	1.7
October	46.1	41.1	2.2	1.6
November	43.0	39.8	2.9	1.3
December	49.0	45.5	2.3	1.6
Total	40.3	36.1	2.7	1.5



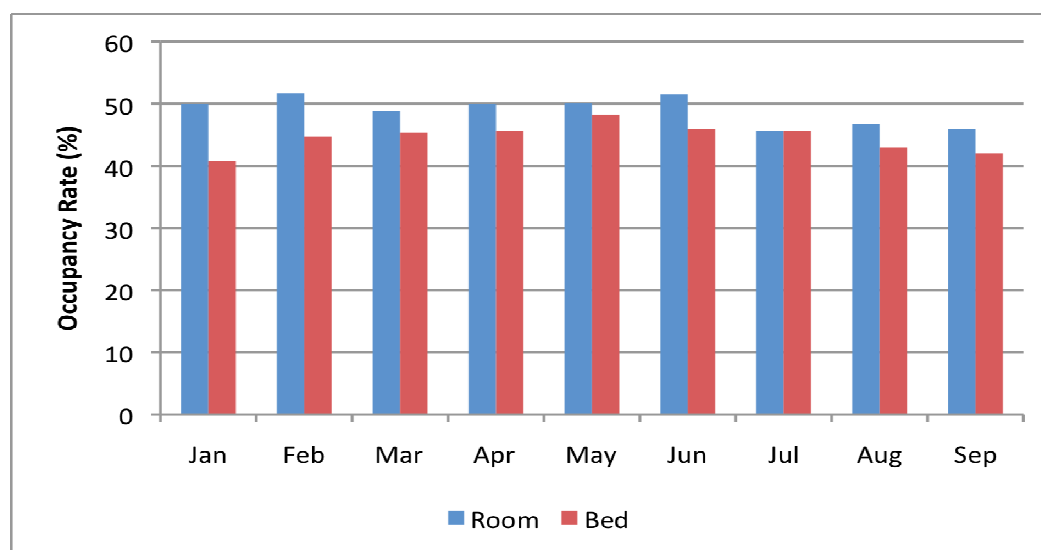
Key Accommodation Indicators by Region: 2008

Region	Room Occupancy Rate (%)	Bed Occupancy Rate (%)	Average Length of Stay (nights)	Average Guests/Room
Chobe	35.8	29.2	2.9	1.4
Ngamiland	31.4	29.3	3.3	1.6
Central	45.8	41.8	2.8	1.4
Ghanzi	31.4	23.0	1.7	1.4
Kgalagadi	29.5	23.8	1.7	1.3
Kweneng	37.9	41.5	3.5	1.6
North East	56.8	49.8	2.0	1.5
South East	58.2	45.9	2.9	1.4
Southern	29.1	29.3	2.4	1.5
Total	40.3	36.1	2.7	1.5

Key Accommodation Indicators by Month: 2009 (Jan-Sep)

Data available for 2009 up to September shows considerably less seasonality than has been observed in previous years, with an expected room occupancy rate for the whole year of between 48% and 50%.

Month	Room Occupancy Rate (%)	Bed Occupancy Rate (%)	Average Length of Stay (nights)	Average Guests/Room
January	50.0	40.8	3.1	1.4
February	51.7	44.7	3.0	1.5
March	48.8	45.4	2.9	1.6
April	50.0	45.6	3.1	1.6
May	50.1	48.3	3.0	1.7
June	51.5	45.9	2.9	1.5
July	45.6	45.6	2.7	1.7
August	46.7	43.0	2.5	1.5
September	45.9	42.0	2.5	1.5



Accommodation Turnover: 2008

Total room revenue per available room was calculated at Pula 367, with a total turnover per available room being Pula 498. The difference of Pula 131 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 88.

	Room Revenue per Available Room (Pula)	Total Turnover per Available Room (Pula)	Average Salary per Available Room (Pula)
2008	367	498	88

Based on a total stock of 4,942 rooms in Botswana the following can be derived:

2008	Pula (m)
Total Room Revenue	662.0
Total Turnover	898.3
Total Wages and Salaries	158.7

Accommodation Employment: 2008

The average number of employees per accommodation room was calculated at 1.4 in 2008. Based on a total stock of 4,942 rooms in Botswana the following can be derived:

2008	Employees
Botswana Nationals	
Male	2,300
Female	3,200
Total	5,500
Foreign Nationals	
Male	300
Female	1,200
Total	1,500
Total Employees	7,000

NATIONAL PARKS

There were 284,501 visitors to Botswana parks and reserves in 2007, of which 269,302 were in the northern parks and reserves. Growth in visitor numbers was considerable, increasing by 30% over the previous year.

Visitors at Parks and Reserves, 2006-2007

	2006	2007	% Change 2006-2007
<i>Northern Parks and Reserves</i>			
Private Visitors	39,363	54,002	37.2
Mobile Tour Operator Clients	54,014	85,699	58.7
Fixed Camps/Lodges Clients	88,734	103,408	16.5
Non Fee Paying Visitors	21,863	26,193	19.8
Total Northern Parks and Reserves	203,974	269,302	32.0
<i>Southern Parks and Reserves</i>			
Private Visitors	11,665	11,912	2.1
Mobile Tour Operator Clients	1,882	2,081	10.6
Non Fee Paying Visitors	625	1,206	93.0
Total Southern Parks and Reserves	14,172	15,199	7.2
Grand Total	218,146	284,501	30.4



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