

tourism market insights
Botswana

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1. Overview of Botswana

About Botswana

Where is Botswana?	Botswana is a landlocked territory in central southern Africa. It is bounded by South Africa in the south and east, by Zimbabwe in the northeast, and by Namibia in the west and north.
Population (millions)	2.3 million (2019)
Time Difference	N/A
Language	Setswana
Economy	<p>Botswana, once one of the poorest countries in the world, now ranks as a middle-income country. Economic growth has averaged around 5% per annum over the past decade.</p> <p>Botswana relies on minerals and other commodities for success but this dependence also renders it vulnerable to international market fluctuations.</p>
Formal Greeting	Dumela
Botswana Etiquette	<p>Botho is Botswana's fifth National Principle and it defines a process of earning respect by first giving it, and to gain empowerment by empowering others.</p> <p>Botho includes positive attributes expected of a human being such as respect etc. good manners, compassion, helpfulness, politeness and humility.</p> <p>This principle plays an important role in the way Botswana interact in society.</p> <p>Below are a few examples of Botho that will be highly appreciated by the locals:</p> <ul style="list-style-type: none">• Taking your hat or cap off when speaking to an elder - sign of respect• When an elder in need of seat and none are vacant, it is Botho to offer the elder your seat.• When entering a house or any building (especially government buildings) taking your hat or cap off (men) is a sign of Botho.• Greeting before beginning a conversation or asking for something/help...is a sign of politeness

2. Economic Overview of the Botswana Travel Market

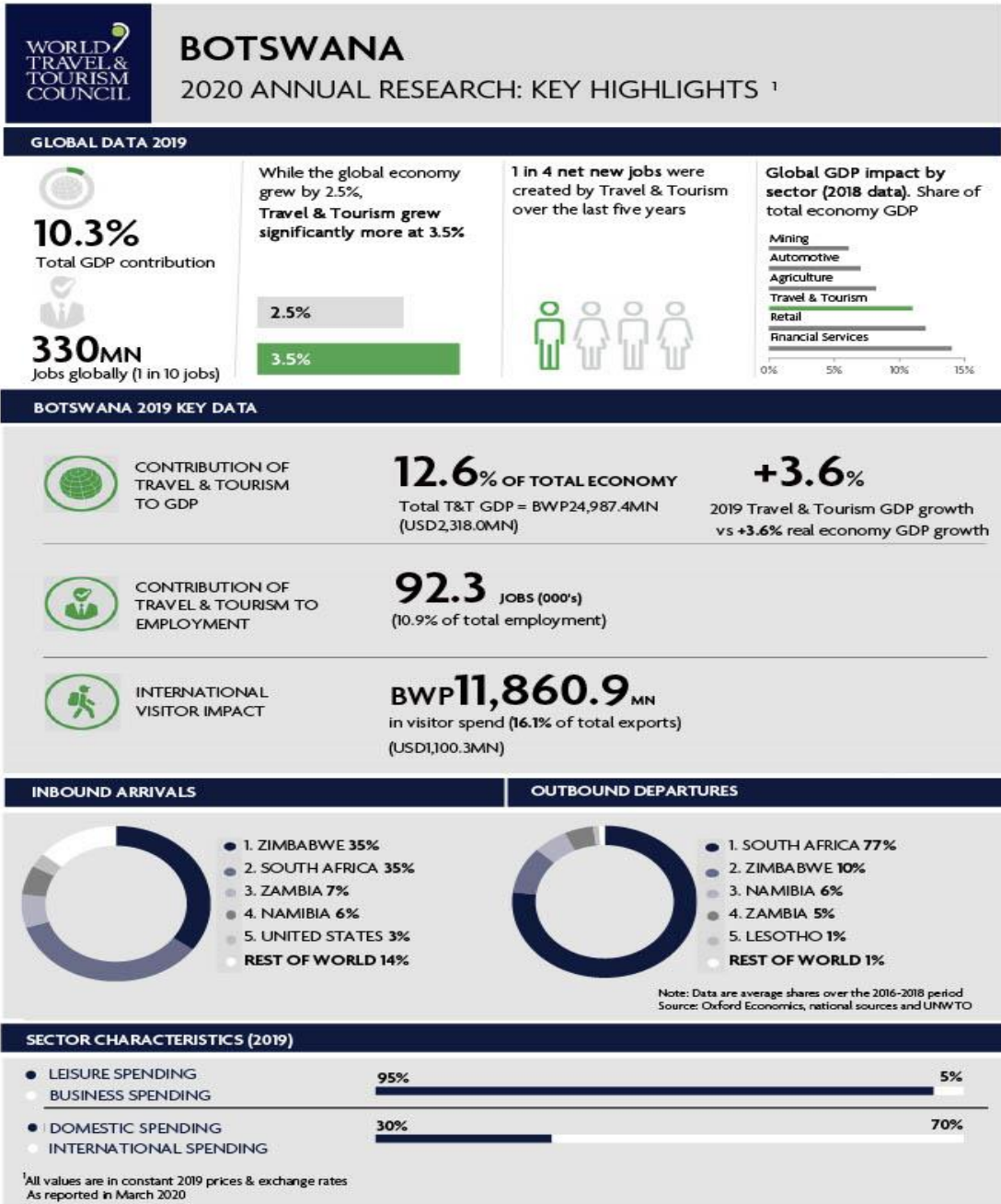
- Botswana, was once one of the poorest countries in the world but now ranks as a middle-income country. Economic growth has averaged around 5% per annum over the past decade.
- The country relies on minerals and other commodities for success, but this dependence also renders it vulnerable to international market fluctuations. The economy improved in 2016 when diamond sales strengthened.
- In 2017 and 2018, real GDP growth was healthy although in 2019, growth slowed to 3.0% owing to decreased diamond production alongside weaker performance in related downstream industries; coupled with the effects of a severe drought in 2018 and 2019.
- The agricultural sector of the country employs 31.8% of the workforce. Cattle herding is the most important activity and accounts for most of farm output. Crop production is limited by frequent droughts and poor soil - other problems include a lack of skills, relatively low levels of investment – especially in irrigation – and poor agricultural infrastructure and marketing.
- The mining sector is large, accounting for more than one-third of GDP. However, it generates little employment owing to the capital-intensive nature of operations. Diamonds account for about three-quarters of export earnings and half of all government revenue. Botswana is the world's leading producer of diamonds. The government is trying to boost local business and employment by encouraging more value to be added to diamonds locally.
- The manufacturing sector is tiny and performing poorly. The sector employs just 2.8% of the workforce and accounts for 5.6% of GDP.
- Safari-based tourism - tightly-controlled and often upmarket - is an important source of income. The tourist sector attracts about 1.7 million foreign visitors in a typical year. The real value of inbound tourist and business travel receipts fell by 1.0% in 2019 and another fall is expected in 2020 due to COVID-19 related travel bans. The service sector makes up 65.1% of GDP.

3. Overview of the Botswana Travel Market

Botswana Travel Market

Largest Cities (number of people)

1. Gaborone (208,411)
2. Francistown (89,979)
3. Molepolole (63,248)
4. Selebi-Phikwe (53,727)
5. Maun (49,945)



Source: WTTC 2020

4. The Botswana traveller to South Africa

Botswana Travel Market

Number of Arrivals	2015: 593 514
	2016: 679 828
	2017: 681 379
	2018: 688 566
	2019: 668 315

Purpose of visit to South Africa (2019)	VFR (34,9%)
	Shopping (23,9%)
	Holiday (10,3%)

Average length of stay in South Africa (Number of nights)	2017: 4,7
	2018: 4,3
	2019: 4,7

Age profile (2019)	18 – 24 years: 9,8%
	25 – 34 years: 36,8%
	35 – 44 years: 37,1%
	45- 54 years: 12,3%
	55 – 64 years: 3,3%
	65+ years: 0,7%

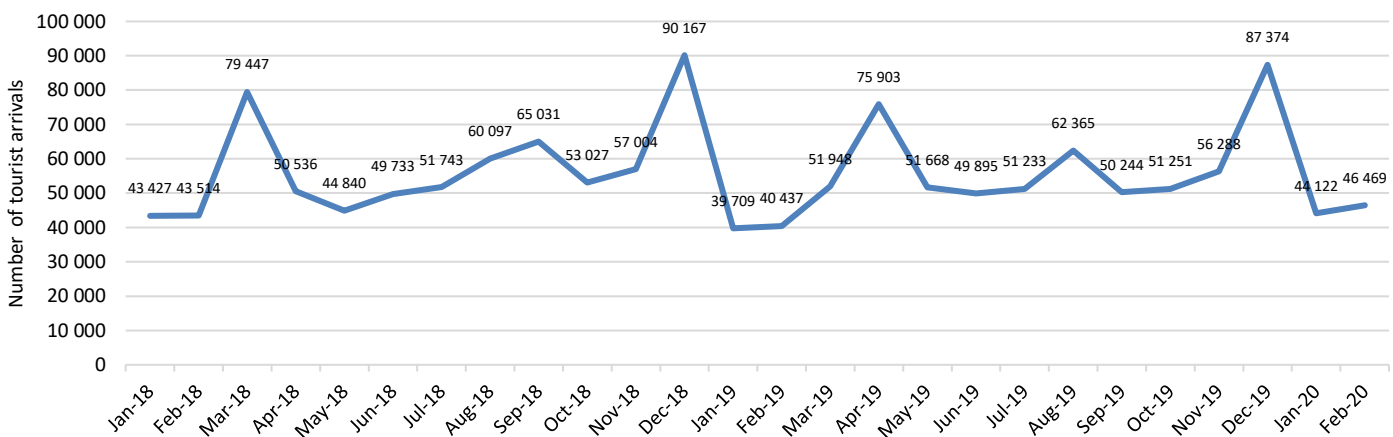
Repeater Rate of Botswana travelers (2019)	First Timers: 4,7%
	2 – 3 Times: 9,3%
	4 - 5 Times: 10,2%
	6 – 9 Times: 9,8%
	10 Times or more: 66,1%

Accommodation Usage (2019)	Friends & Family: 1 862 681
	Hotels: 232 360
	Guest House: 134 323

Total Foreign Direct Spend in South Africa (R in billions)	2017: R 2,8
	2018: R 2,4
	2019: R 1,7

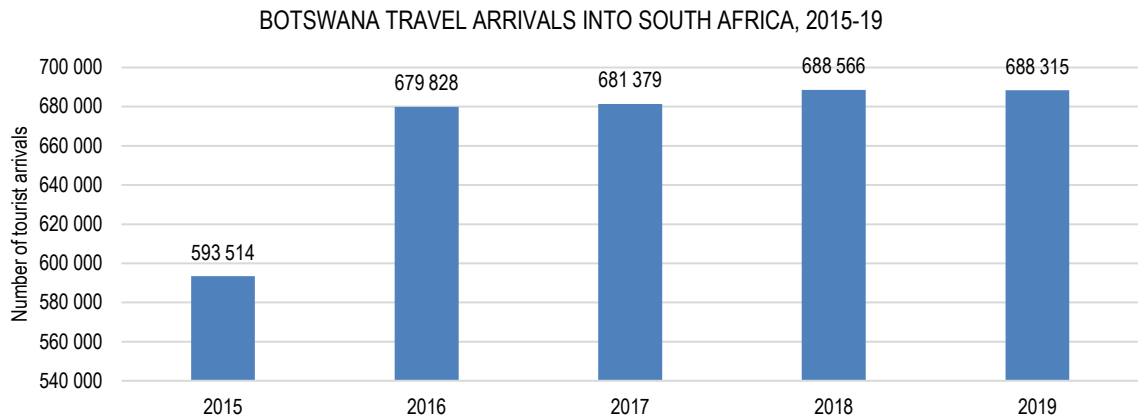
Average Spend in South Africa	2017: R4 500
	2018: R3 600
	2019: R2 700

BOTSWANNA TOURIST ARRIVALS TO SOUTH AFRICA, JAN 2018 – FEB 2020



4. The Botswana traveller to South Africa

4.1. Visitor Arrivals to South Africa



4.2. Purpose of visit to South Africa

Visiting friends and relatives (34,9%) ranked as the top motivation for travelling to South Africa in 2019. 23,9% mentioned they travelled to the country for shopping purposes while (10,3%) travelled for holidays.

In 2019, the Botswana market stayed in South Africa for less than 5 days with an average of 4,7 nights, up from the 4.3 nights recorded in 2018.

However the Botswana travel market had the least nights spent in the country as compared to most African markets travelling into the country.

Top reasons for travel to SA

VFR (34,9%)

Shopping (23,9%)

Holiday (10,3%)

Average length of stay (2019)

4,7 nights

4.3. Activities in South Africa

Top activities undertaken

Shopping

Beach

Nightlife

Business

Natural Attractions

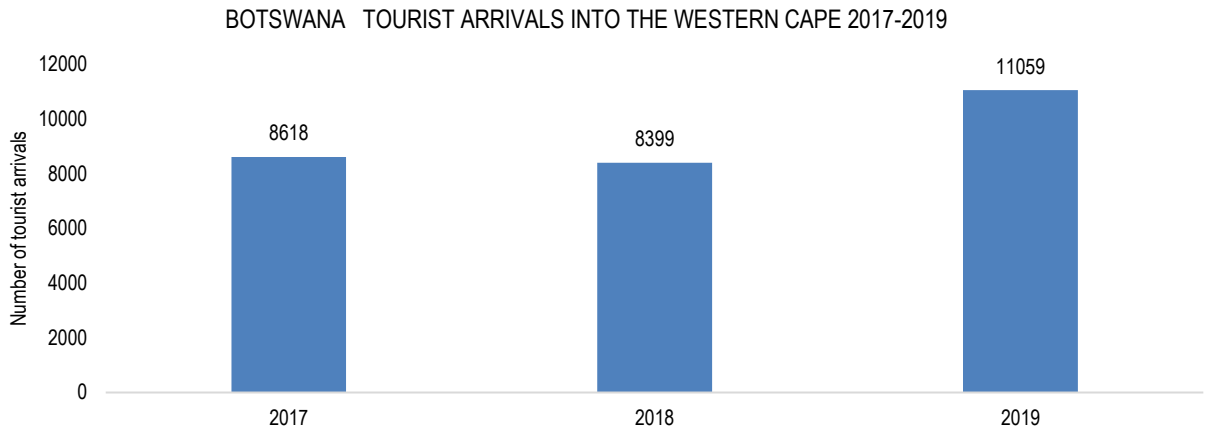
Botswana travelers primarily enjoyed shopping, the outdoors, visiting the beach and natural attractions. They also kept busy enjoying the nightlife and business ventures.

In terms of accommodation usage Botswana travelers preferred:

1. Staying with friends and relatives
2. Sleeping in hotels &
3. Guest houses.

5. The Botswana traveller to the Western Cape

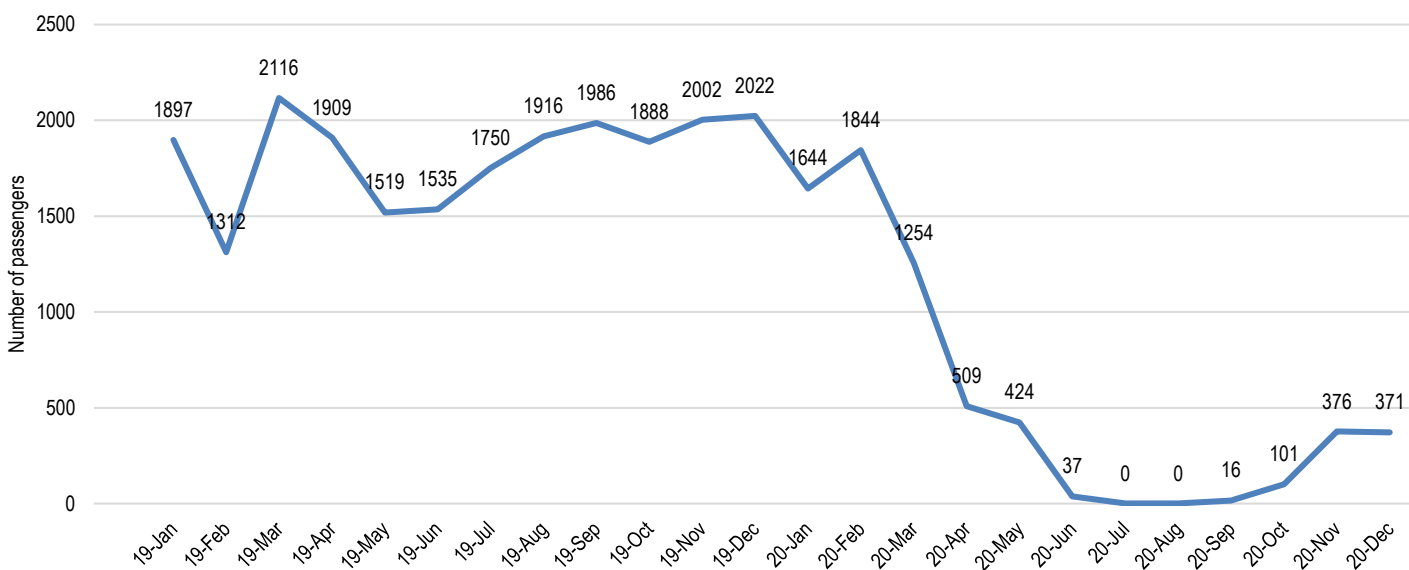
5.1. Visitor Arrivals to the Western Cape



5.2. Passenger Traffic through Cape Town International Airport

The COVID-19 pandemic has undoubtedly had a devastating impact on the tourism economy. Countries the world over shut their borders in an attempt to curb the spread of the virus and this has since had devastating effects on the global travel industry. As a result, travelers from Botswana to Cape Town have decreased since June 2020 with a -97,6% decline recorded as compared to travelers from June 2019.

BOTSWANA PASSENGER MOVEMENT THROUGH CAPE TOWN INTERNATIONAL AIRPORT, JAN 2019- DEC 2020



6. Key Findings

- Travelers from Botswana were led by those travelling for visiting friends and relatives, followed by shoppers and those travelling on holiday. They were most impressed with South Africa's beautiful scenery, friendly people and the diverse nightlife experiences. With their average length of stay being recorded at 4,7 nights in 2019.
- On average travelers from Botswana stay in South Africa for less than 5 days. In 2018 these tourists stayed for 4,3 days as compared to 4,7 in 2017.
- South Africa received a total of 10,2 million foreign arrivals in 2019 a decline of -2,3% as compared to the 10,5 million arrivals accounted for in 2018 of which 688 315 of these tourists in 2019 were from Botswana.
- In 2019, a total of 21 852 Botswana arrivals were welcomed at Cape Town International Airport however a -69,9% decline was witnessed in 2020 with arrivals being 6 575.
- In 2019, travelers from the country were typically between the ages of 35-44 (37,1%). Of the total travelers 9,8% fell under the 18-24 year old category, with 36,8% between the ages of 25-34 years and 12,3% between 45-54 years old.
- In terms of financial contribution, Botswana contributed R1,7 billion in 2019, while 2018 saw the country contributing R2,4 million to South Africa's economy. -0,7 million below the spend received in in 2018.

7. List of sources

1. South African Tourism
2. Euromonitor International
3. OAG Airline Passenger Traffic Analyser
4. Cape Town International Airport
5. World Travel & Tourism Council
6. <https://www.budgetbotswanasafaris.com/botswana-culture.html>

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