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Ministry of Environment and Tourism

Report on the Namibia Tourist Exit Survey 2012-2013

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April 2013

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ACRONYMS

B&B	Bed and Breakfast
ME	Middle East
NTB	Namibia Tourist Board
NWR	Namibia Wildlife Resorts
UNWTO	United Nations World Tourism Organization
VFR	Visiting Friends and Relatives
GDP	Gross Domestic Product
MCA-N	Millennium Challenge Account Namibia
MET	Ministry of Environment & Tourism
DOTG	Directorate of Tourism and Gaming
GRN	Government of the Republic of Namibia



FOREWORD



Tourism sector is the fastest growing industry in Namibia considering its contribution towards Gross Domestic Product (GDP). It has been identified as a strategic sector in the National Development Plan 4 with promise for growth and job creation by the Government.

The tourism industry is recognised and supported by the Government of the Republic of Namibia (GRN) for its increasing value and importance of sector linkages, its ability to generate foreign exchange earnings, employment, rural development, poverty reduction and empowerment of the local communities. The tourism industry presents great opportunities to promote economic, social development and environmental protection.

Ministry of Environment and Tourism (MET) and the Namibian tourism industry have identified the need for timely collection of tourism-related statistics which are very important for planning, tourism development, market investment and allocation of funds for tourism development. The industry needs to know why visitors come to Namibia, where they come from, their activities and places visited, length of stay, the likelihood of repeat visits, and primary motivations for visitors to travel. The Namibia Tourist Exit survey 2012 – 2013 data will enable us to compare past trends, and compile the Tourism Satellite Account, National Accounts and Balance of payments. If the current trend of developing tourism products in a sustainable manner continues and is upheld at all times, tourism will be a key catalyst for growth and nation building despite economic uncertainty.

In conclusion, I would like to thank the Millennium Challenge Account Namibia (MCA-N) for their technical and financial support in the development of the Namibian tourism sector over the past three years. My special thanks goes to the staff of the Directorate of Tourism and Gaming (DOTG) in the Ministry, and staff of the Namibia Tourism Board (NTB) respectively, for their valuable inputs, dedication and initiatives to make this very costly exercise a reality.

Secondly, my special appreciation is extended to the Ministry of Home Affairs and Immigration, and Namibia Airports Company for the support they have rendered to the consulting firms: Acorn Tourism Consulting and SIAPAC.

And last, allow me to extend my sincere gratitude to the tourism stakeholders and the private sector for their tireless support towards this Ministry; and in making this exercise in particular, a success.

.....

Hon. Uahekua Herunga, MP
Minister of Environment and Tourism

Executive Summary

Key Statistics

Purpose of Visit
39% Holiday
27% Business
25% VFR
9% Other

Mode of Transport
68% arrive by land
32% arrive by Air

Average Length of Stay
9 Nights

Previous Visits
68% been before
32% on first visit

Age
53% Under 40 years
47% Over 40 years

Sex
54% Male
46% Female

Most Popular Places Visited
Windhoek 56%
Swakopmund 30%
Walvis Bay 25%
Etosha National Park 23%

Most Popular Activities
Shopping 54%
Game Viewing 29%
Nature/Landscape Touring 26%
Hiking/Trekking 14%

Accommodation Used
Guesthouse/B&B 35%
Friends/Family 31%
Lodge/Tented Lodge 17%

Transport Used to Travel Around
Public Transport 30%
Private Car/4x4 27%
Hire Car/4x4 20%

Travel Companions
43% Travel alone
31% Travel with a companion
26% Travel with 2 or more companions

Holidays Visitors (only)
Wildlife and Scenery are what attracts them the most

South Africa, Botswana and Tanzania are the main competing destinations

Internet is the main source of information

Self Booking is the most common way of booking the holiday

Expenditure
Average spend per night: N$ 1,840
Average spend per tourist on Airfares: N$ 9,556

Key Words

Highlights:
Bird Watching
Beautiful Landscape
Wildlife
People

Disappointments:
Immigration
Service
Unsafe

Suggested Improvements:
Infrastructure
Information Points
Customer Service

1. INTRODUCTION

How To Use This Report

This report presents the findings from the Namibia Tourist Exit Survey 2012-2013, and will be read by people from many different backgrounds and interests. Consequently, it is important to present the findings so that they can be of use to all – from those who have little understanding of tourism and statistics, right through to those who need to make complex strategic decisions regarding planning, marketing, policy making and regulation within the tourism sector.

Therefore, a three-tier approach to the presentation of the data has been developed, so that all readers, no matter what their background or interest, can get the most out of the findings from the survey.

The survey findings have been divided into 11 topics, such as how long tourists stay, where they visit, how much they spend, etc. Information on each of these is presented at three levels:

- **Infographics** – this one page summary is aimed at providing a quick snapshot of the most important information for those readers who want to very quickly get an understanding of each topic. *Each chapter starts with an infographic page that provides this information.*

- **Key Facts** – these are slightly more detailed pieces of information, accompanied by one or two charts, to provide more insight into each topic. *These appear in each chapter after the infographic.*

- **Detailed Tables** – these provide detailed data relating to each category of information, showing the findings that correlate to the key markets (RSA, Angola, Botswana, Zimbabwe, UK, Germany, France, Italy, USA), the main purposes of visit (Holiday, VFR, Business, Medical, Other) and the four generating regions (Africa, Europe, Americas, Asia/Middle East). *These appear in Appendix A.*

Technical notes on the weighing process, disaggregation of package tours and analysis of data are provided in Appendix B.



Scope Of The Survey

The principal unit of measurement of the Namibia Tourist Exit Survey is the *tourist* and the *tourist trip*. All definitions used within the survey adhere to UNWTO concepts and classifications of tourism. The definitions of a tourism trip and a tourist are shown below.

> *A **tourism trip** is one that takes a traveller to a main destination outside his/her usual environment, for at least one night but less than a year, for any main purpose (business, leisure or other personal) other than to be employed by a resident entity in the place visited. These travellers are called **tourists**.*

Consequently, day visitors are excluded from the survey, as are all persons who live in Namibia, regardless of their nationality. Persons employed by Namibian firms are also excluded.

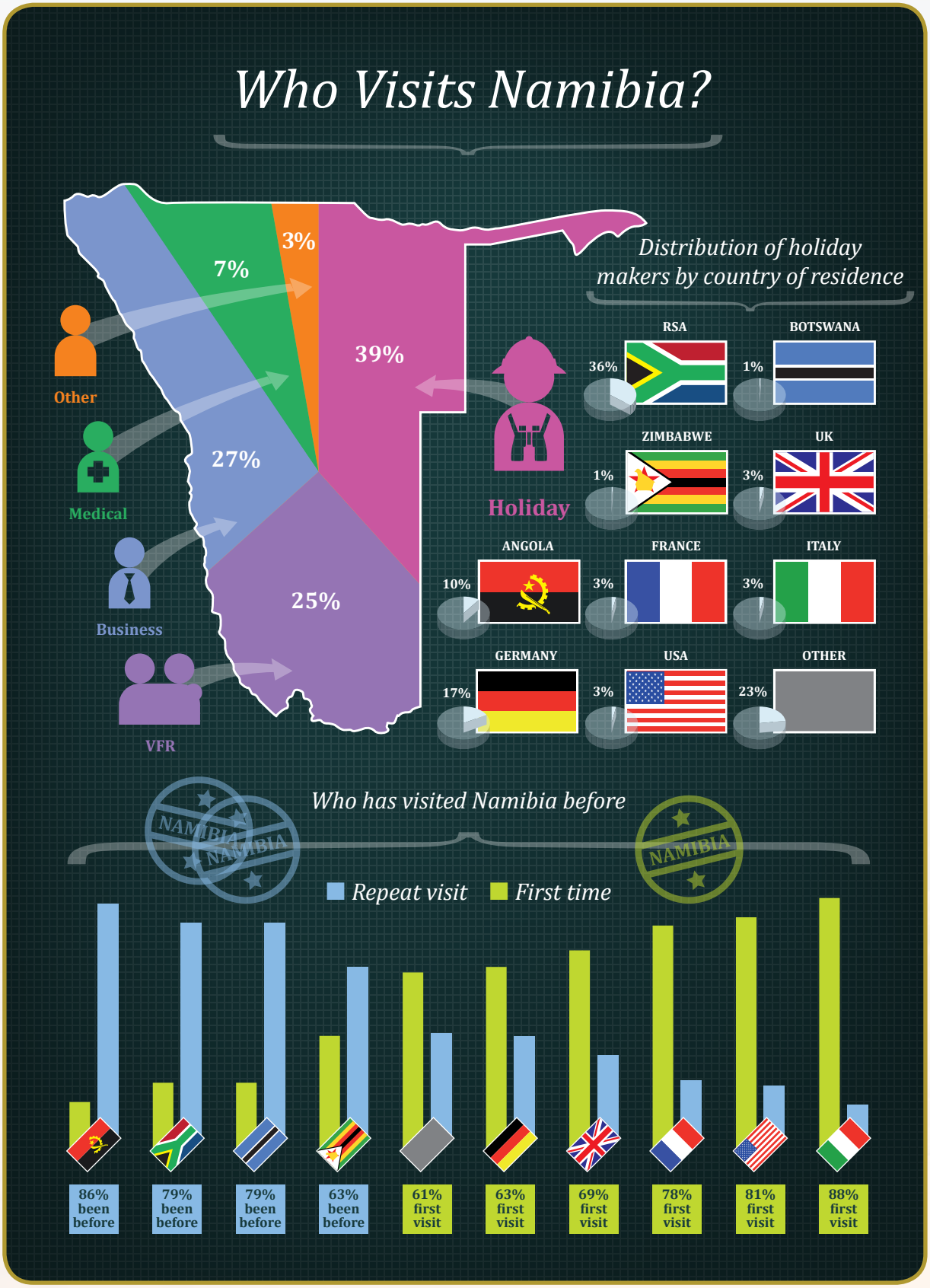
The survey was carried out during three separate survey periods that fell between June 2012 and January 2013 at Hosea Kutako International Airport, Walvis Bay Airport, Buitepos, Wanela, Oshikango, Ariamsvlei, and Noordoewer, and a total of 6,500 respondents were interviewed.

Interview periods were carefully selected to ensure a representative sample of tourists from the high, medium and low seasons. During the analysis of the responses, data have been weighed to ensure that results are representative of all tourist arrivals (thereby ensuring that over-sampled or under-sampled nationalities were adjusted accordingly).

The survey was undertaken using face-to-face interviews. Consequently, all respondents were stopped by a member of the interview team at an air or land border, and asked a set of questions.

The analysis of the responses to these questions is contained in this report.




Who Visits Namibia?
3%
7%
39%
27%
25%
Other
Medical
Business
VFR
Holiday
Distribution of holiday makers by country of residence
RSA
36%
BOTSWANA
1%
ZIMBABWE
1%
UK
3%
ANGOLA
10%
FRANCE
3%
ITALY
3%
GERMANY
17%
USA
3%
OTHER
23%
Who has visited Namibia before
NAMIBIA
NAMIBIA
NAMIBIA
Repeat visit
First time
86% been before
79% been before
79% been before
63% been before
61% first visit
63% first visit
69% first visit
78% first visit
81% first visit
88% first visit

Key Facts:

- Whilst around 50% of all South African tourists are travelling for holiday/leisure, only a small proportion of the other African markets travel for this purpose.
- Holiday/leisure travel dominates the European markets, although is least significant with the British tourists (70%), for whom over 21% of travel is for business.
- Most tourists' nationality is the same as their country of residence. The greatest exception to this is residents of the UK, of which 79% are British nationals, whilst 10% are South African nationals.
- Over two-thirds of all tourists visiting Namibia have been before. This average is pushed up by African visitors, of whom over 80% have been before, compared to 30% from Europe and 25% from the Americas.
- Over 80% of tourists from the USA and Italy are visiting for the first time.

Purpose of Visit by Country of Residence

This table is potentially the most important for understanding the structure of tourism to Namibia. Of the total holiday market, South African tourists are the most significant (over one-in-three, or 36%), whilst Angola dominates the business tourism sector, with over one half of all tourist arrivals, and almost all of the medical tourist arrivals. Key figures are shaded in the table below.

Country of Residence	Total (%)	Holiday (%)	VFR (%)	Business (%)	Medical (%)	Other (%)
RSA	28.3	36.3	35.7	19.2	0.1	6.2
Botswana	3.6	0.8	6.3	4.9	1.0	9.5
Angola	35.8	10.2	37.7	51.4	98.9	69.0
Zimbabwe	4.1	0.8	3.2	10.9	0.0	2.3
United Kingdom	1.9	3.4	0.6	1.5	0.0	0.0
Germany	7.7	16.6	3.4	1.8	0.0	1.0
France	1.4	3.1	0.2	0.4	0.0	0.3
Italy	1.1	2.7	0.0	0.2	0.0	0.0
USA	1.6	3.3	0.6	0.7	0.0	0.0
Other	14.6	22.7	12.2	9.2	0.0	11.7
Total	100.0	100.0	100.0	100.0	100.0	100.0

The VFR market is dominated by tourist arrivals from South Africa and Angola, whilst Germany is the most significant generating country for holiday tourists outside of South Africa.

Note that the "Other" Country of Residence group is relatively small (only 3% of all respondents). Most (69%) of these were from Angola, of which 54% were in transit, 39% were shopping, and 7% were travelling for religious purposes.

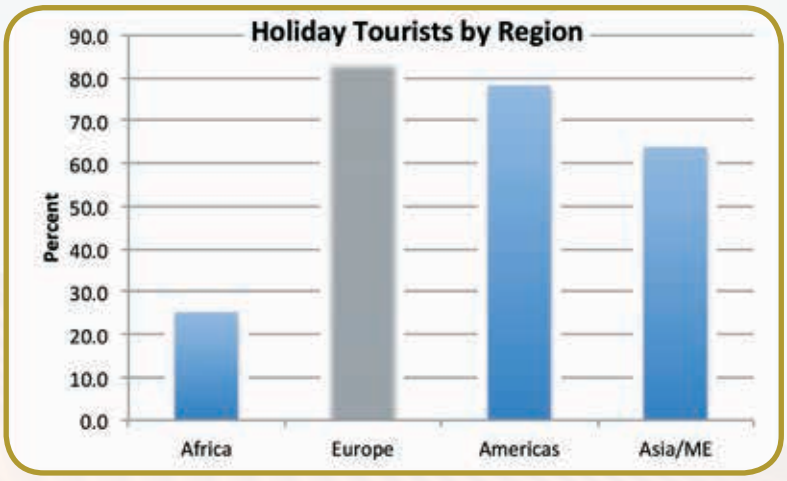
The table below shows the percentage of holiday tourists by country of residence, so that those countries for which there were not a sufficient number of interviews for more detailed analysis can be seen.

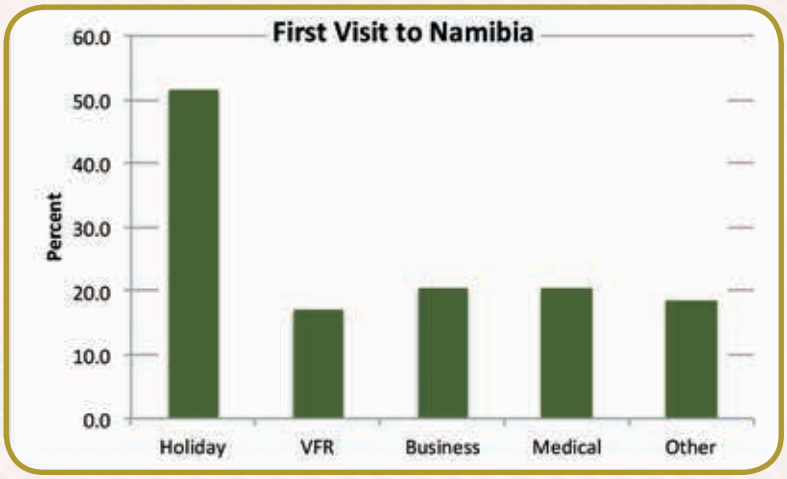
Country of Residence: Holiday Tourists	(%)
South Africa	36.3
Germany	16.6
Angola	10.2
Netherlands	3.8
Spain	3.4
United Kingdom	3.4
USA	3.3
Switzerland	3.1
France	3.1
Italy	2.7
Australia	2.0
Canada	1.4
Belgium	1.4
Austria	1.3
Sweden	1.0
Botswana	0.8
Zambia	0.8
Zimbabwe	0.8
Mozambique	0.5
Portugal	0.5
New Zealand	0.4
Finland	0.2
Tanzania	0.2
Luxembourg	0.2
Poland	0.2
Japan	0.2
Russia	0.2
Brazil	0.2
China	0.1
Morocco	0.1
Denmark	0.1
Israel	0.1
Czech Republic	0.1
Norway	0.1
Ireland	0.1
Ukraine	0.1
Singapore	0.1
India	0.1
Korea	0.1
Thailand	0.1
Hong Kong	0.1
Greece	0.1

European tourists mainly travel for holidays. Almost 84% of all tourist arrivals from Europe are visiting for holiday/leisure.

Of the holiday/leisure tourists, around one half has visited the country before, with the other half visiting for the first time.

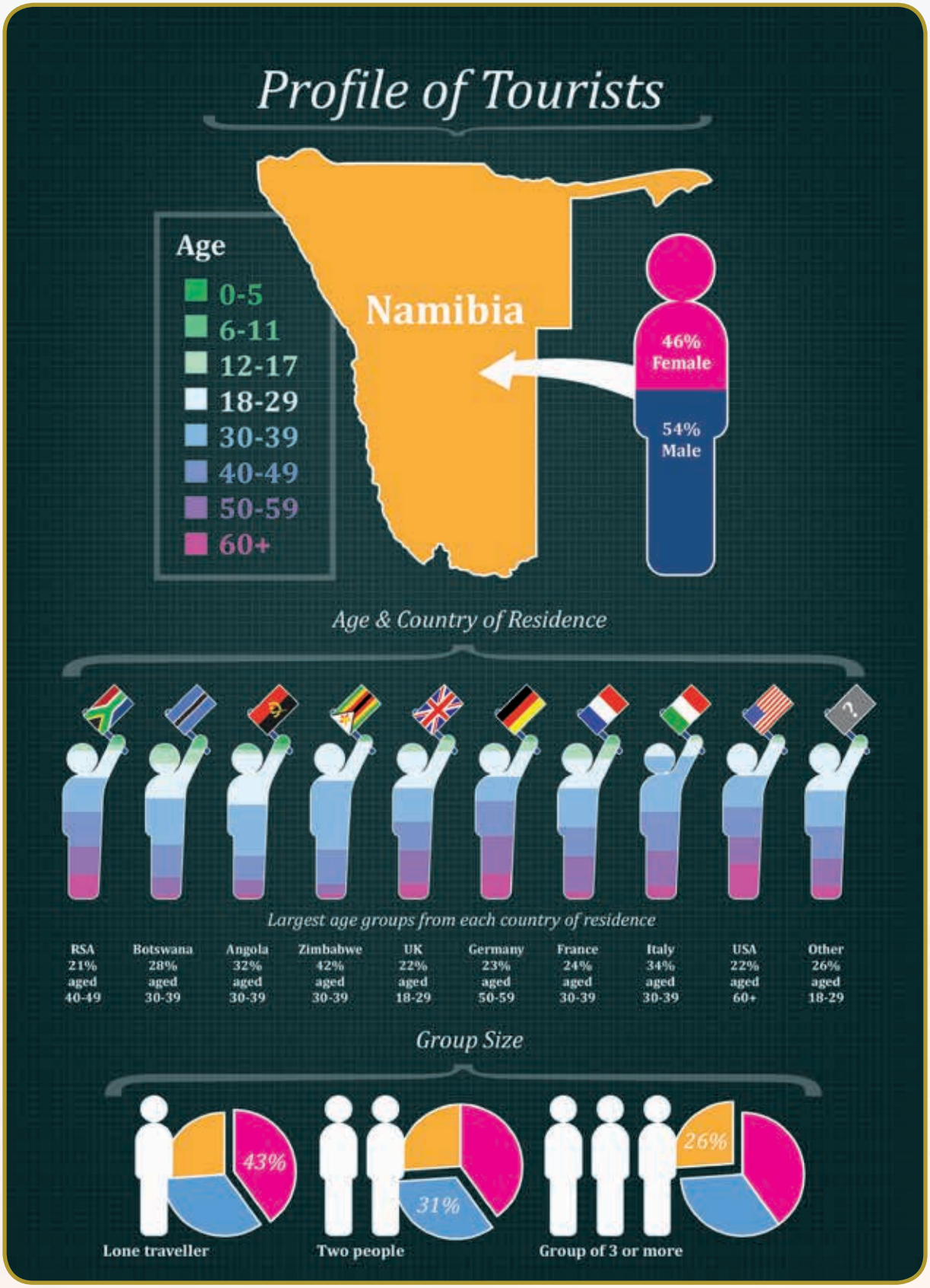
Around four out of every five tourists travelling to the country for all other purposes of visit have been to Namibia before.







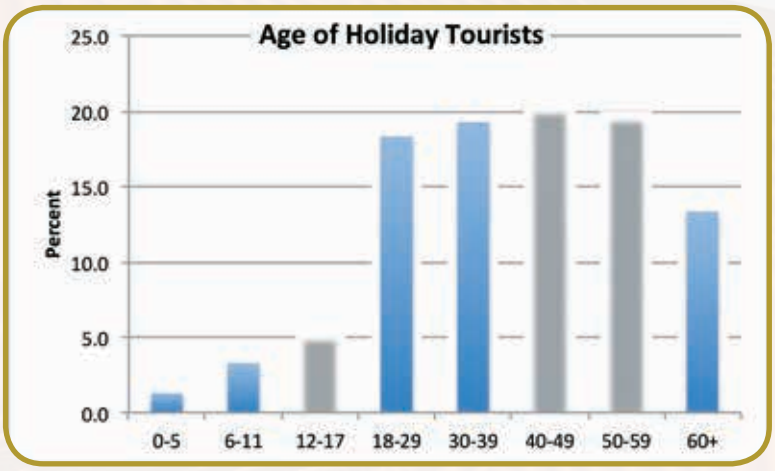
3. PROFILE OF TOURISTS



Key Facts:

- The most significant age group for all tourists visiting Namibia is the 30 to 39 year olds. However, age profiles change by country of residence and purpose of visit. Visitors from Europe are older (52% are 40+) than those from Africa (44% are 40+).
- There is a heavy dominance of males visiting for business (75%) and females visiting for medical treatment (64%).
- Tourists travelling alone are generally younger than those travelling in groups (2 or more people). 29% of all tourists travelling in a group were 50+ years old.

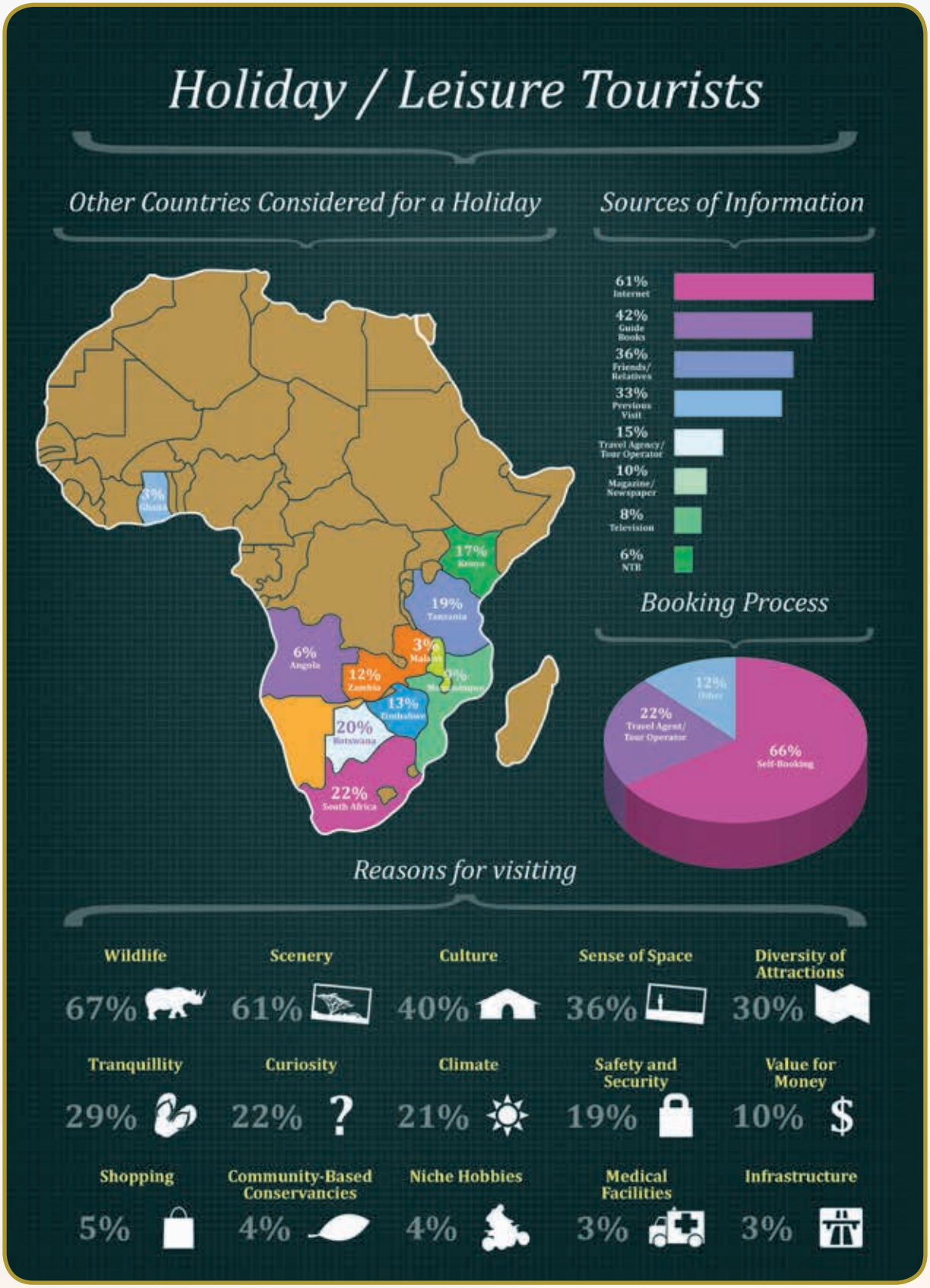
The age profile of holiday tourists shows a roughly even split of visits from persons in the 18-29, 30-39, 40-49 and 50-59 age groups. Even the 60+ age group is reasonably well represented (13%).



Only 15% of holiday tourists travelled to Namibia on their own (compared to 49% visiting friends and relatives and 73% travelling for business). Of those holiday tourists not travelling alone, over one half were travelling as a couple (two people).



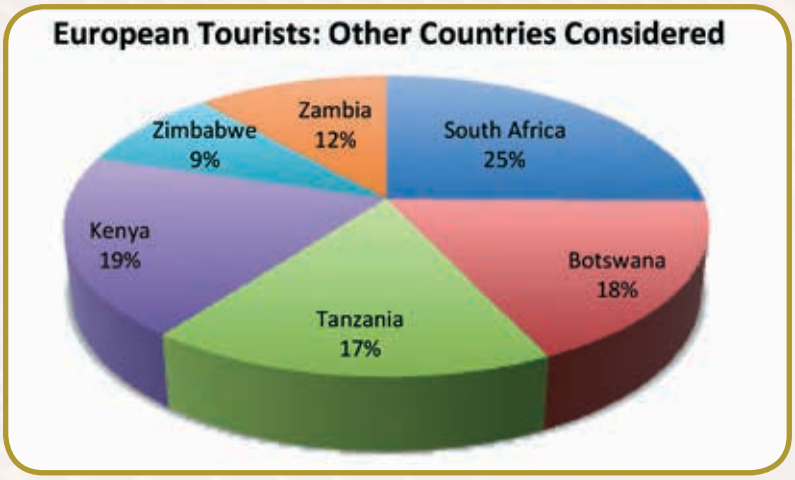
4. HOLIDAY PLANNING *(holiday tourists only)*



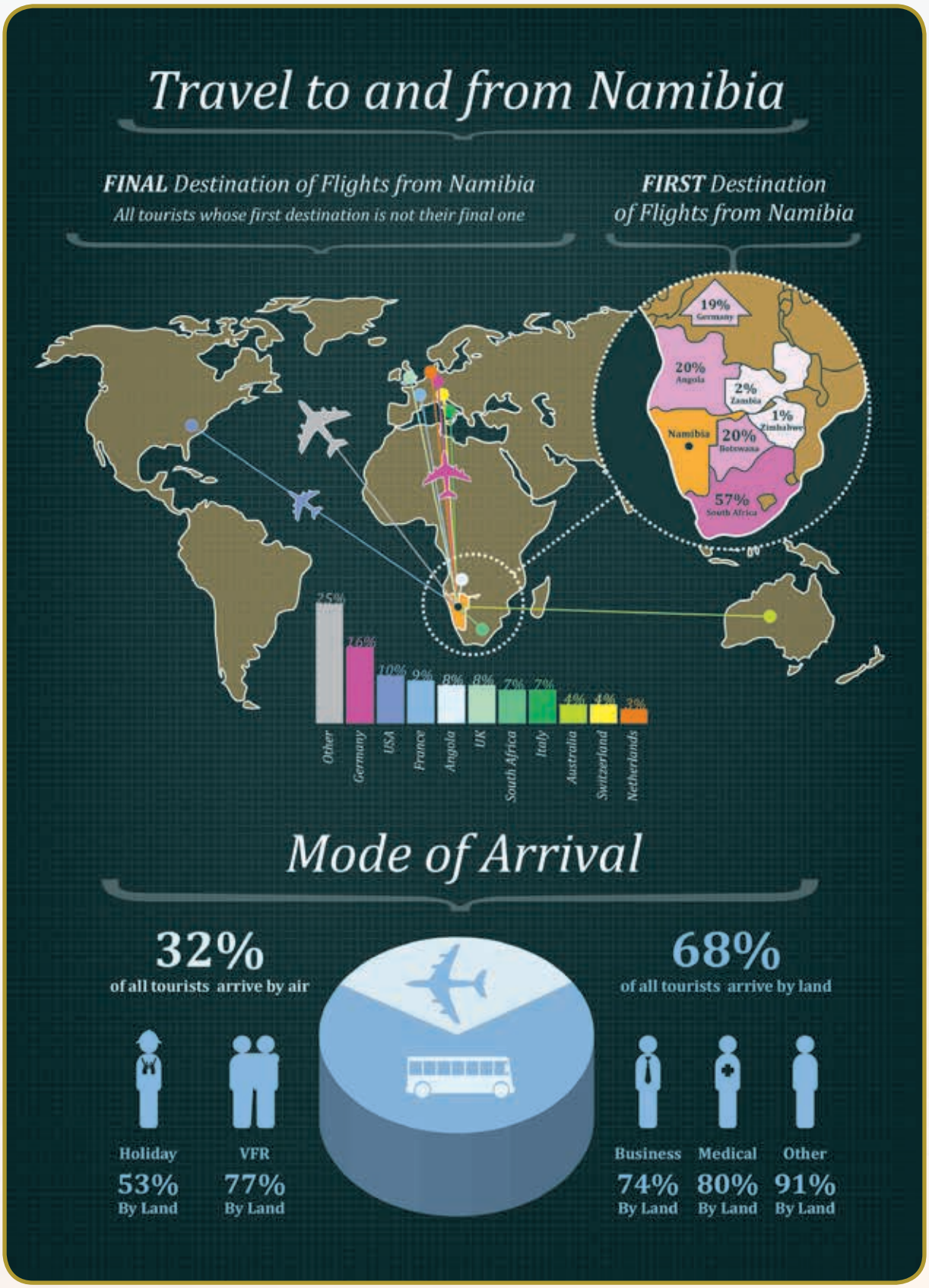
Key Facts:

- Wildlife was the most significant attractor for holiday tourists when selecting Namibia as their destination.
- However, holiday tourists from South Africa were most attracted by the scenery, whilst for those from Angola it was the value for money.
- Whilst not significantly important for the African markets, climate was important for European markets and tourists from the USA, as were scenery, culture, sense of space, diversity of attractions, and tranquillity.
- For the USA market, curiosity was a key attractor, mentioned by 43% of all tourists.
- For the Angolan market, niche hobbies and community-based conservancies were significant attractors (these were barely mentioned by tourists from any of the other countries).
- South Africa, Botswana and Tanzania were most commonly considered as alternative holiday destinations. Although for South Africans, Zimbabwe was the country most tourists considered instead of Namibia.
- Whilst the Internet and guidebooks were the most used sources of information to learn about Namibia, for tourists from Europe and (in particular) the USA, travel agencies and tour operators were significant providers of information. For the German market, around one in five visitors stated a previous visit as a source of information.
- Two in every three holiday tourists book their holiday themselves, however, this is inflated by the South African (90%) and Angolan (80%) tourists. Nevertheless, independent bookings in the UK stand at 45% and in the USA at 48%.
- Of those holiday tourists booking through a travel agent/tour operator, around one booking in every four is with an agent/operator in Namibia (rather than in another country).

For European leisure tourists, whilst South Africa is the country they are most likely to consider as an alternative to Namibia, the East African destinations of Kenya and Tanzania are significant, being mentioned by 36% of all tourists.



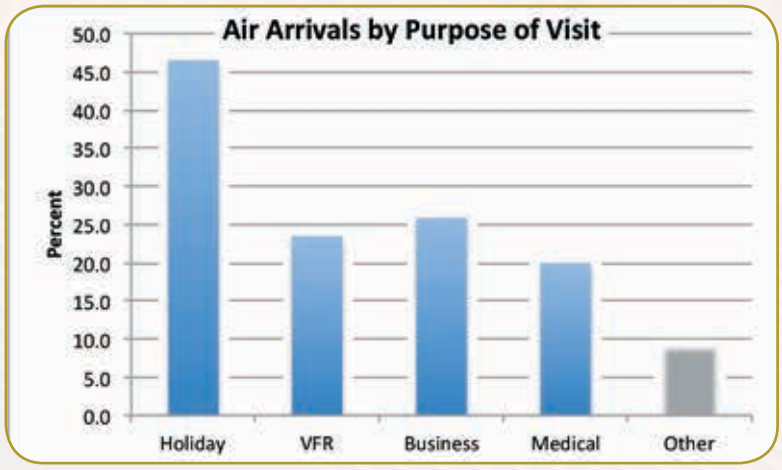
5. HOW DO THEY GET HERE AND AWAY?



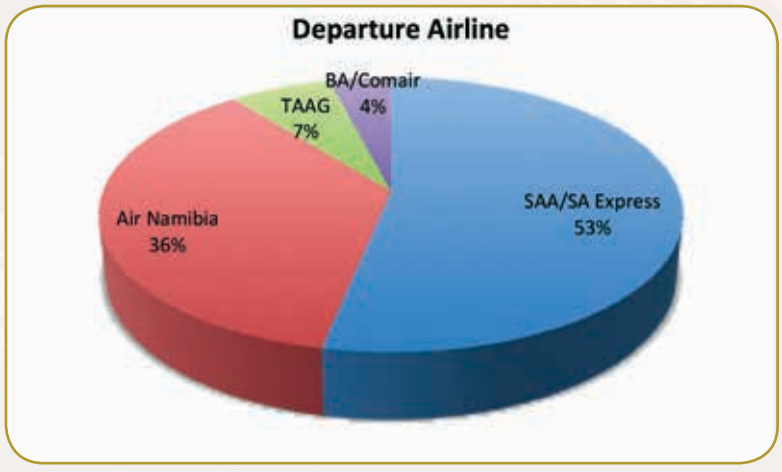
Key Facts:

- Although 32% of all tourists arrive by air, 47% of holiday tourists arrive by this mode of transport, and a much higher percentage of tourists from Germany, France and Italy arrive by air (all over 90%). Overall, 17% of tourists from Africa arrive by air, whilst 84% of tourists from Europe arrive by air.
- SAA/SA Express was a more popular airline for tourists travelling for VFR and business (64% and 66% of all tourists respectively) than for those taking a holiday (45%). In fact, Air Namibia was marginally more popular for holiday tourists (46%).
- South Africa is the most common ***first*** destination for tourists leaving Namibia by air, with 43% flying to Johannesburg and 14% flying to Cape Town. A further 18% flew to Frankfurt and 16% to Luanda.
- 40% of all tourists flying out of Namibia then flew on to another destination. The final destination of the trip was defined as the next place they would spend a night (on land). Of these, 16% were flying on to Germany, 10% to the USA, 9% to France and 8% to the UK.
- The most popular end-destination airport was Frankfurt, where 9% of tourists were ending their journey, followed by Paris (6%) and London (6%).

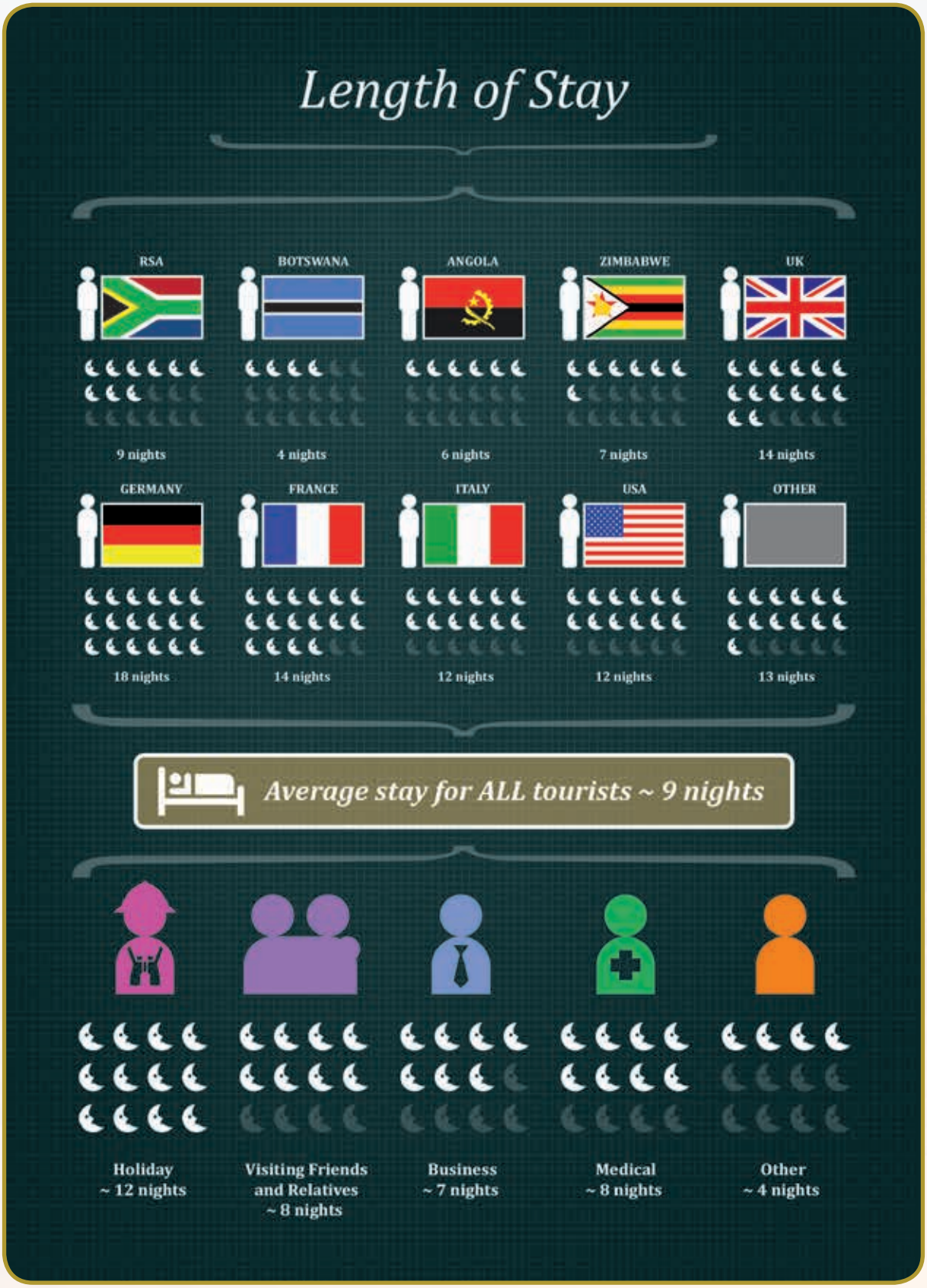
Demand for air travel depends considerably on the purpose of visit of tourists. Those arriving for holiday are most likely to travel by air.



Over one-half (53%) of all departures by air are on SAA/SA Express. However, tourists from different countries have different preferences. Tourists from Germany and Italy are more likely to travel on Air Namibia, largely due to the service to Frankfurt.



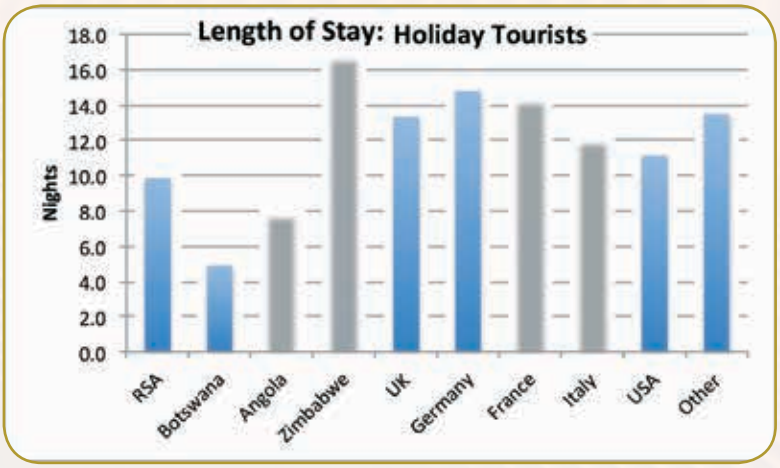
6. HOW LONG DO THEY STAY?



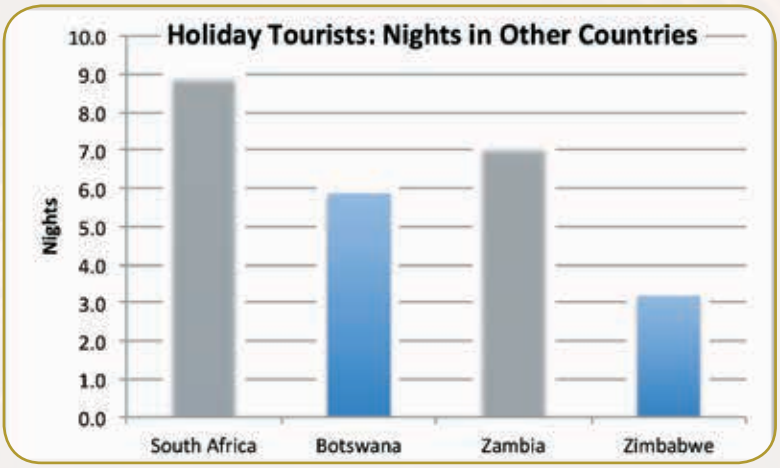
Key Facts:

- The average length of stay of all tourists to Namibia is 9.1 nights.
- Tourists travelling to Namibia for the first time tend to stay considerably longer (16.1 nights) than those who have visited before (8.6 nights).
- Of the key markets, those from Germany stay longer (18.1 nights) than any others. Overall, tourists from Europe stay longer (15.9 nights) than those from Africa (7.1 nights). However, tourists from Asia/Middle East stay the longest (18.1 nights).
- Whilst the average length of stay in Namibia is 9.1 nights, the average length of stay of the entire trip away from home is 11.7 nights, so around 3 nights (on average) are spent elsewhere (or travelling – for example nights on planes).
- The tourists most likely to spend time in other countries are those from Europe, Americas, and Asia/Middle East. These tourists spend, on average, 6, 11, and 12 nights respectively in other countries when travelling to Namibia.
- South Africa, Botswana, Zambia and Zimbabwe are the countries that tourists are most likely to spend the nights that they are not in Namibia.

Of the African markets, holiday tourists from Angola and Botswana stay the longest, whilst from the European markets, holiday tourists from Germany and the UK stay longer than those from the other key markets.



Holiday tourists are most likely to spend time in neighbouring countries whilst visiting Namibia. Those travelling to South Africa spend an average of almost 9 nights there, whilst those travelling to Zambia spend an average of just over 7 nights there.



7. WHERE DO THEY STAY?



Note: where less than 1% of tourists visited a location, the destinations were grouped into a *Region*, which was determined by the location of that destination (e.g. Western Region, Caprivi Region, etc.).

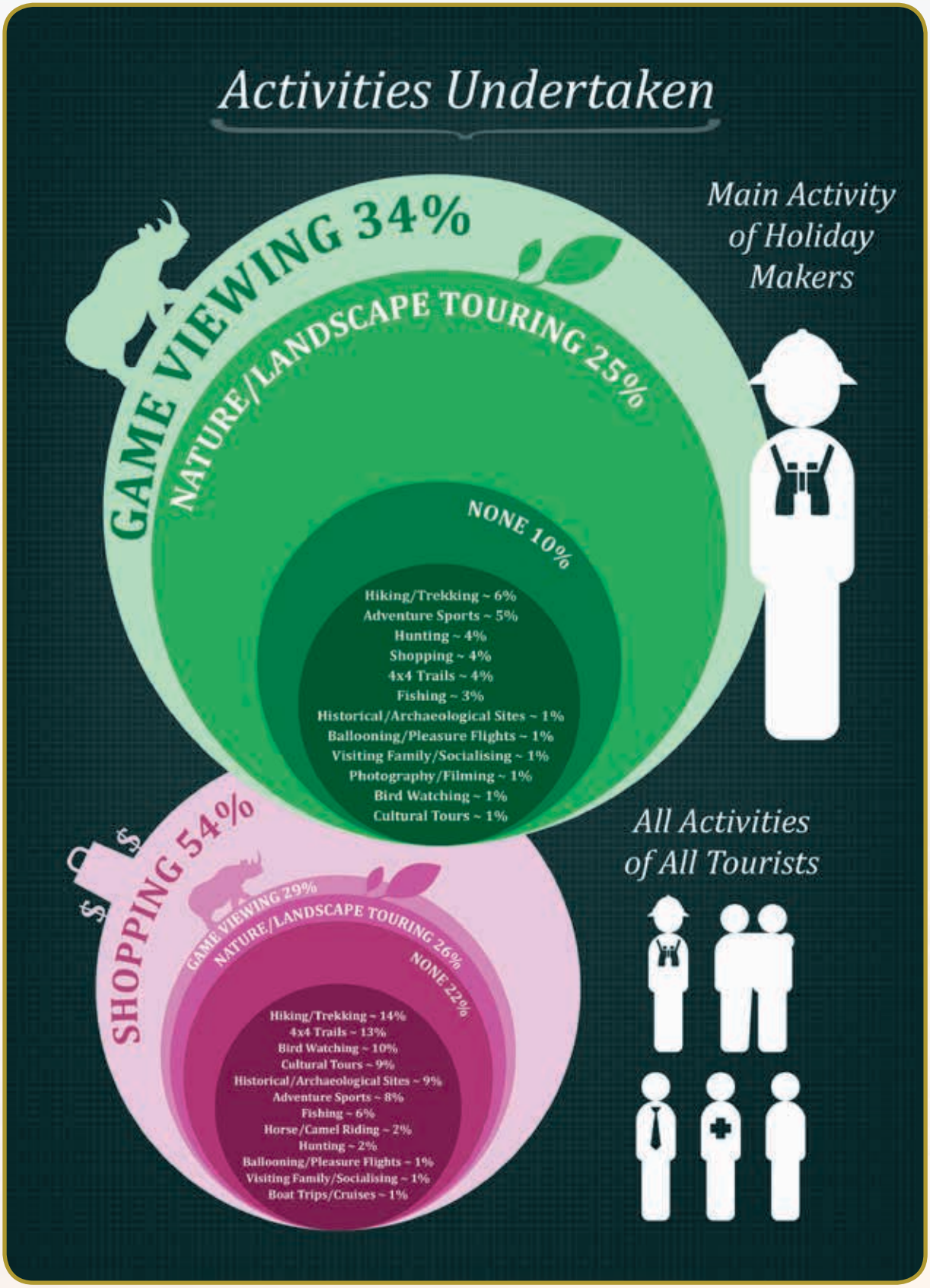
Key Facts:

- The major urban centres of Windhoek and Swakopmund are the most visited places by tourists in Namibia, in part due to their strategic locations in the country for transportation (airports and roads).
- Etosha National Park is the most visited National Park, with 22% of all tourists travelling there, and 53% of all holiday tourists. 80% of all tourists from France visited Etosha.
- For these holiday tourists, Windhoek, Swakopmund and Etosha National Park are the three most popular places to visit.
- Tourists visiting for holidays tend to travel to more than three times as many places as those visiting friends and relatives.
- Oshakati (and area) is the most visited place for Business and Other tourists, and the second most visited place for Medical tourists.

The top 10 most visited places by holiday tourists range from Windhoek (visited by 70%) to Spitzkoppe (17%). However, there are 16 places in total that are visited by 10% or more holiday tourists.

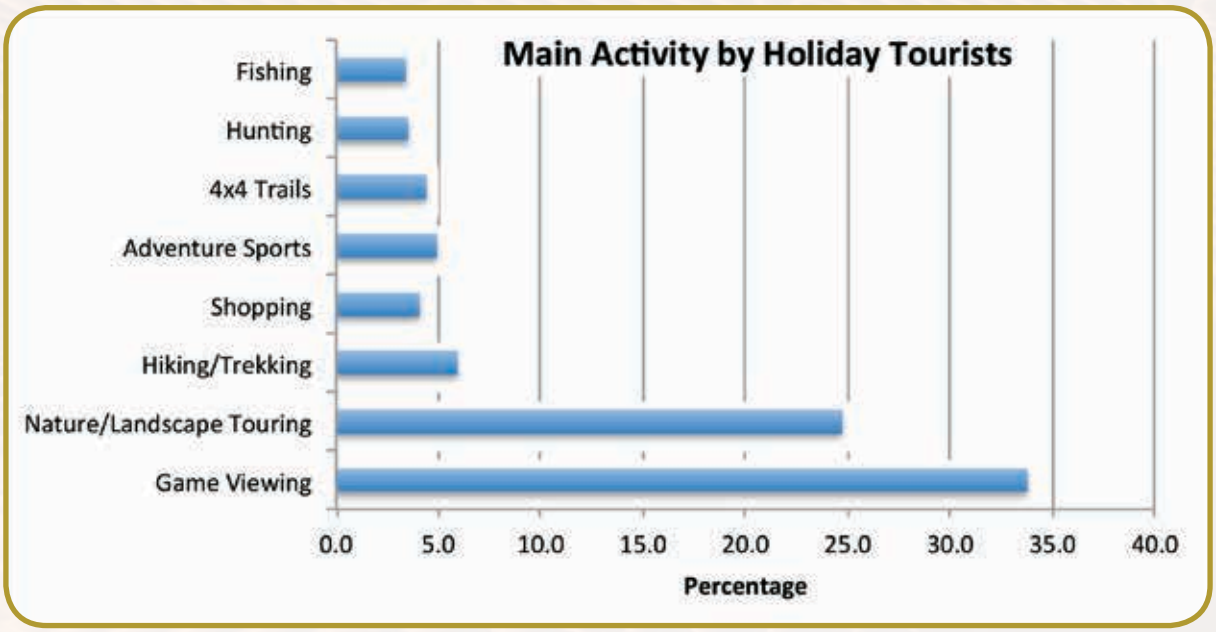


8. WHAT DO THEY DO?

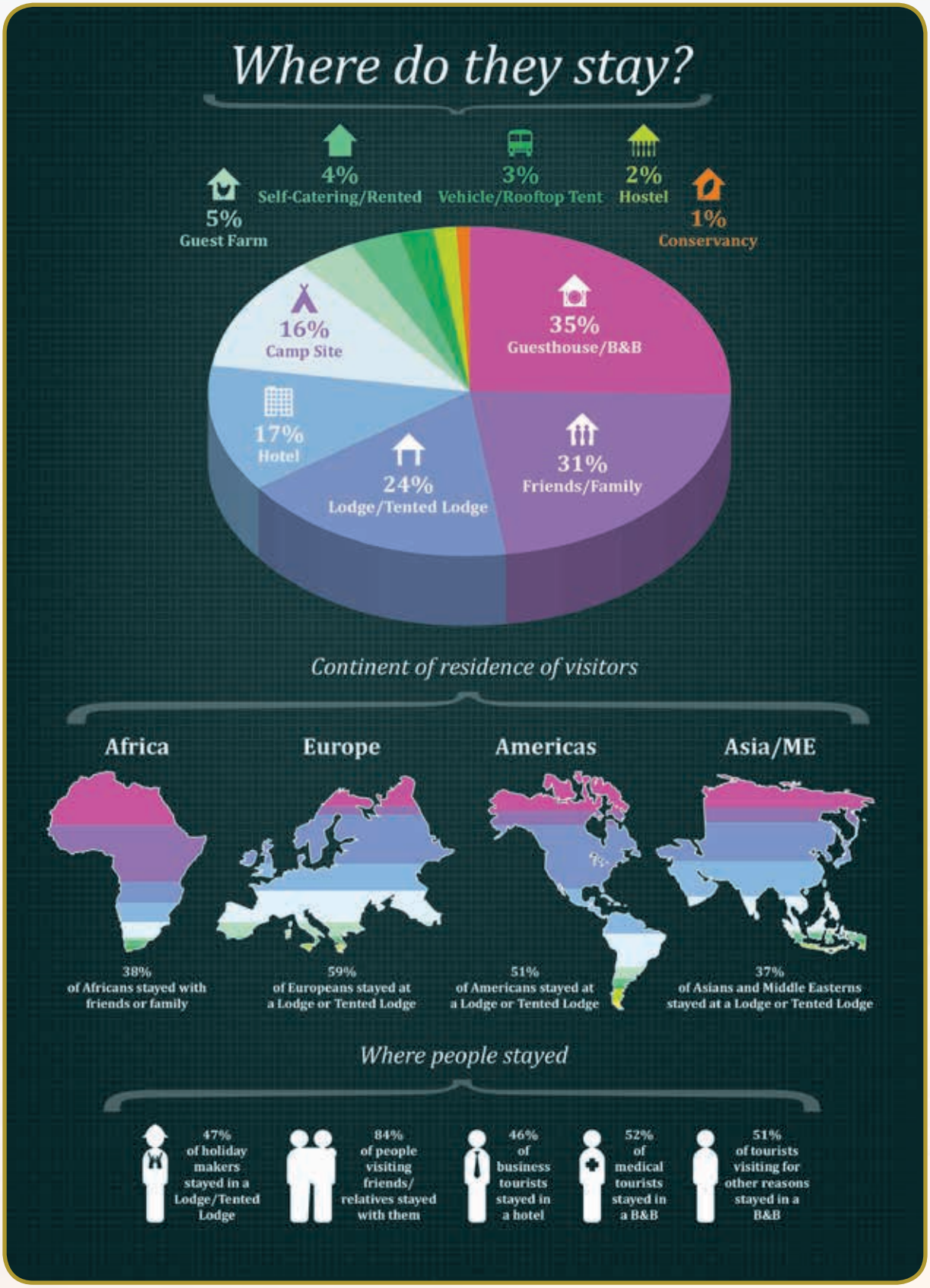


Key Facts:

- Shopping was the most common activity undertaken by all tourists visiting Namibia, with 54% doing this. This includes all types of shopping: household items, souvenirs, etc., but not shopping for food and beverages.
- The second and third most popular activities were Game Viewing and Nature/Landscape Touring (29% and 26% respectively), followed by None (mainly selected by business and medical tourists), Hiking/Trekking, 4x4 Trails, Bird watching, Historical/Archaeological Sites, Cultural Tours, and Adventure Sports.
- For Holiday tourists, Game Viewing is the most popular activity (undertaken by 65%), followed by Nature/Landscape Tourism (59%).
- Shopping is by far the most popular activity for VFR and Medical tourists.
- Whilst Game Viewing and Nature/Landscape Tourism are the two most popular activities of tourists from the European and USA markets, Game Viewing is more popular with tourists from the UK, Germany and USA, whilst Nature/Landscape Touring is more popular with tourists from France and Italy.
- Only Holiday tourists felt (in the main) able to select a **Main Activity** that they undertook whilst in Namibia (all other types of tourist did not perceive themselves as having a main activity – they were there on business, to see friends/relatives, have medical treatment etc). Of these, one third (34%) stated that Game Viewing was their main activity, with one quarter (25%) stating Nature/Landscape Touring as their main activity.

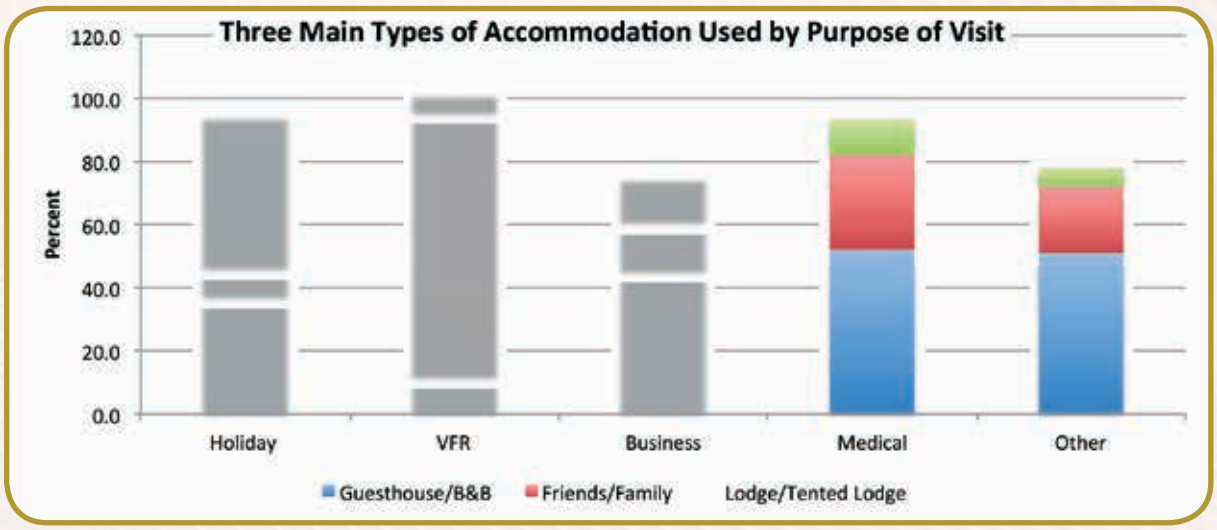


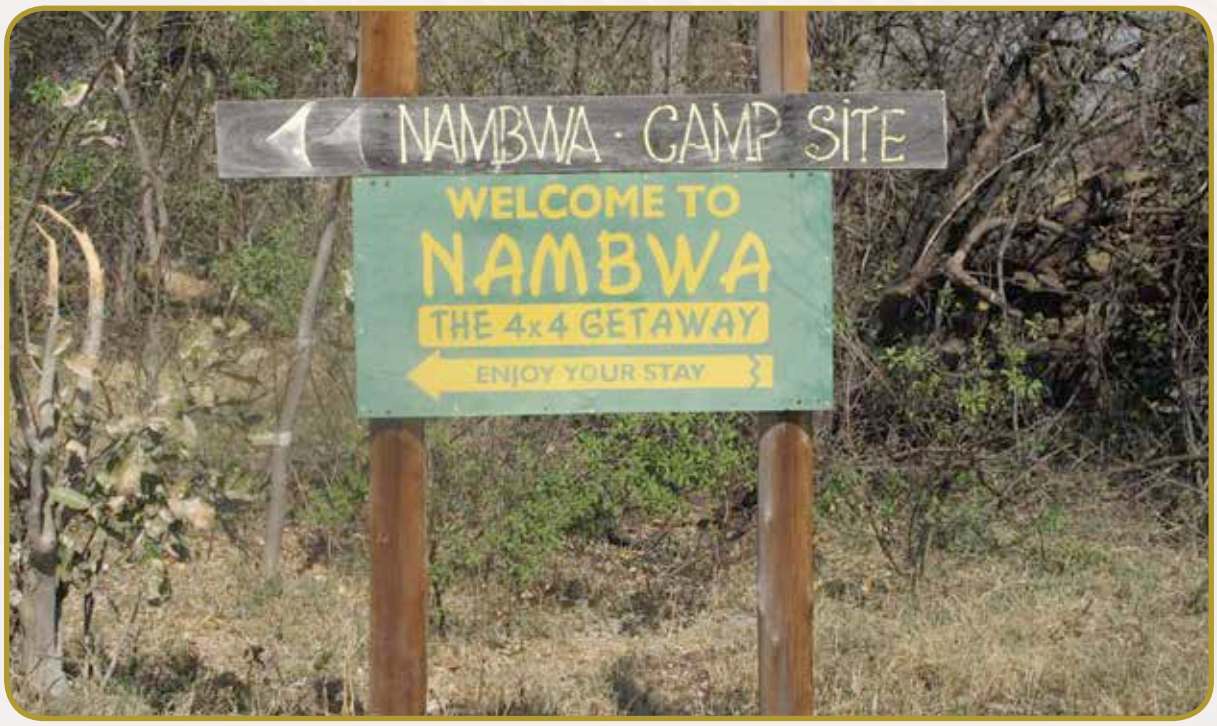
9. WHERE DO THEY STAY



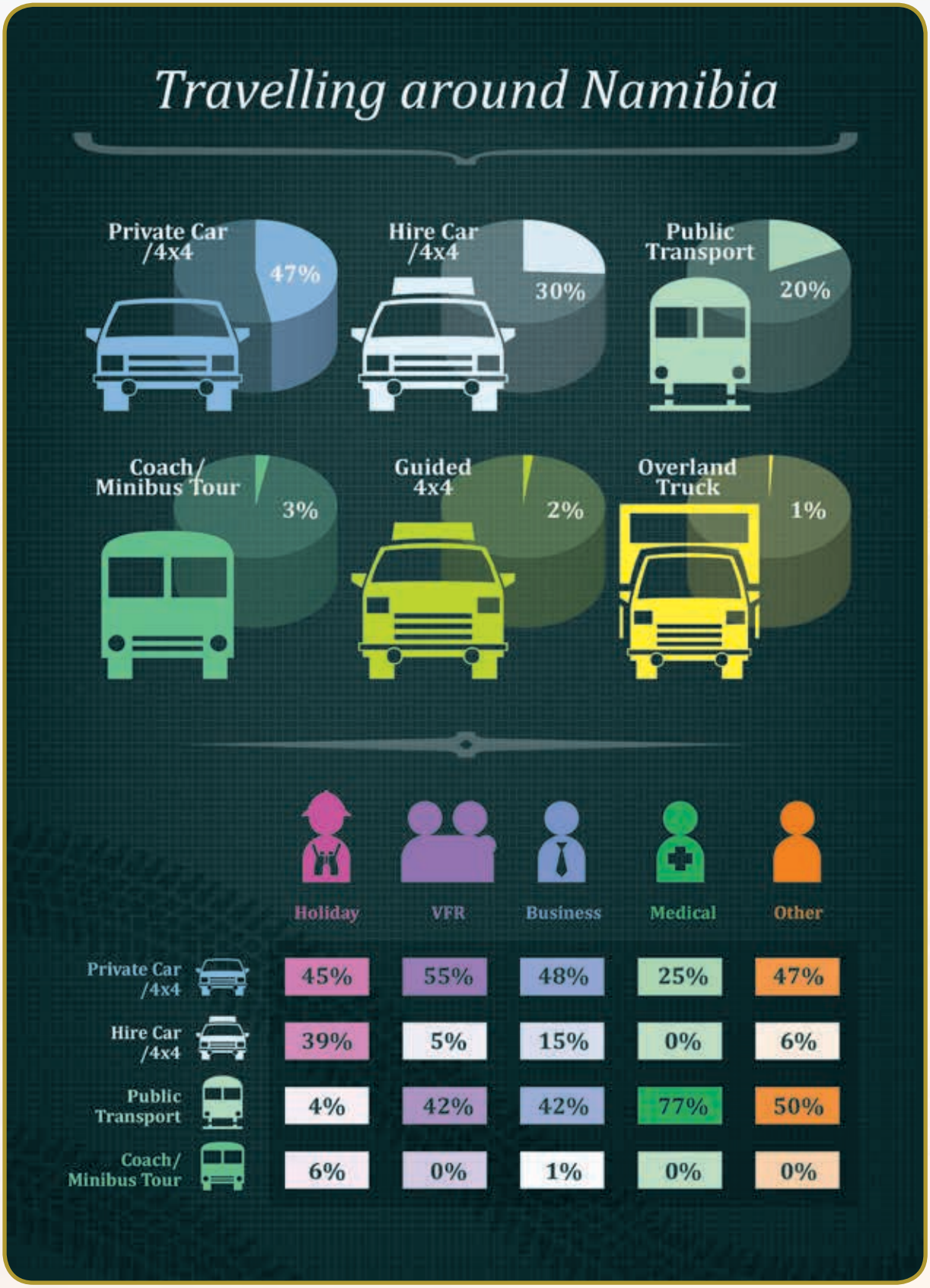
Key Facts:

- Whilst Guesthouse/B&Bs are the most popular type of accommodation for tourists, different types of accommodation appeal to tourists on different purposes of visit and countries of residence.
- Lodge/Tented Lodges are most popular with holiday tourists, whilst those on business prefer Guesthouse/B&Bs.
- Non-commercial accommodation (staying with friends/family) is extremely popular for all types of tourist in Namibia. It is the second most popular type of accommodation (after Guesthouse/B&B), and used by 84% of tourists visiting friends and relatives, 30% of tourists travelling for medical purposes, 16% of business tourists, and even 9% of holiday tourists.
- Of the European markets, residents of Germany are the most likely to stay with friends/family – 15% stated that they stayed in this type of accommodation.





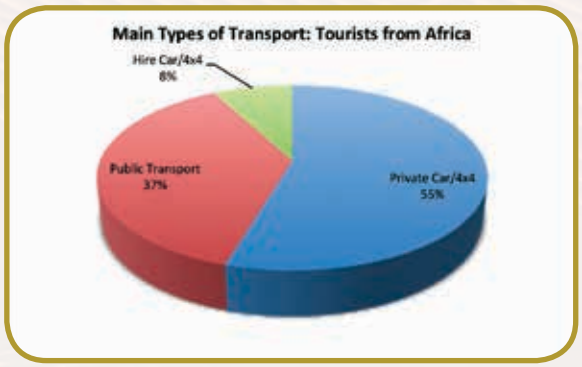
10. HOW DO THEY TRAVEL AROUND?

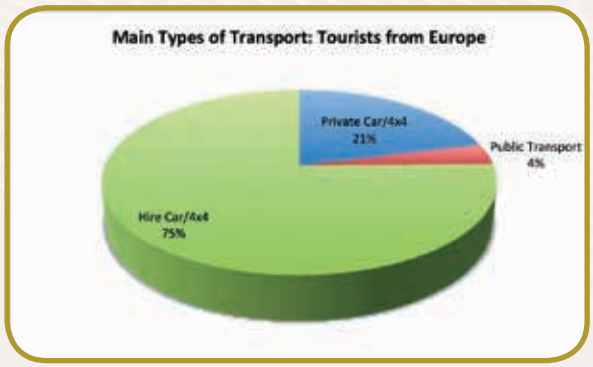


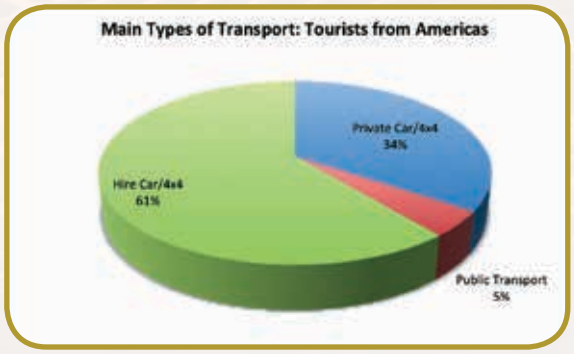
Key Facts:

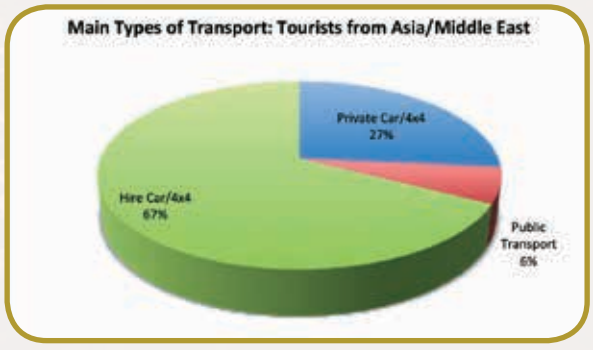
- Overall, private vehicles (car or 4x4) were the most popular type of transport used to travel around Namibia. Almost 47% of all tourists used this form of transport during their trip.
- However, public transport is clearly important, being the second most used form of transport (30%). However, public transport is mainly used by African tourists (38% said they used it), with only 3% of European and American tourists using this form of transport.
- The hiring of vehicles (cars or 4x4) is extremely popular amongst non-African tourists, with 63% of European tourists, 44% of American tourists, and 52% of Asia/Middle Eastern tourists renting a car/4x4.
- Of the European markets, the French (76%) and Italian (75%) tourists were the most likely to rent a vehicle.
- Minibus/coach tours were most popular with German tourists (15%) and UK tourists (10%).
- Travelling around in an overland truck is mainly the domain of tourists from the UK.
- There is a relatively little use of internal air services to travel around the country. This is most popular amongst American tourists (6% stated they had used air transport).

The proportion of the three main types of transport used by tourists from each region is shown below, and highloghts the predominance of public transport amongst the African markets.

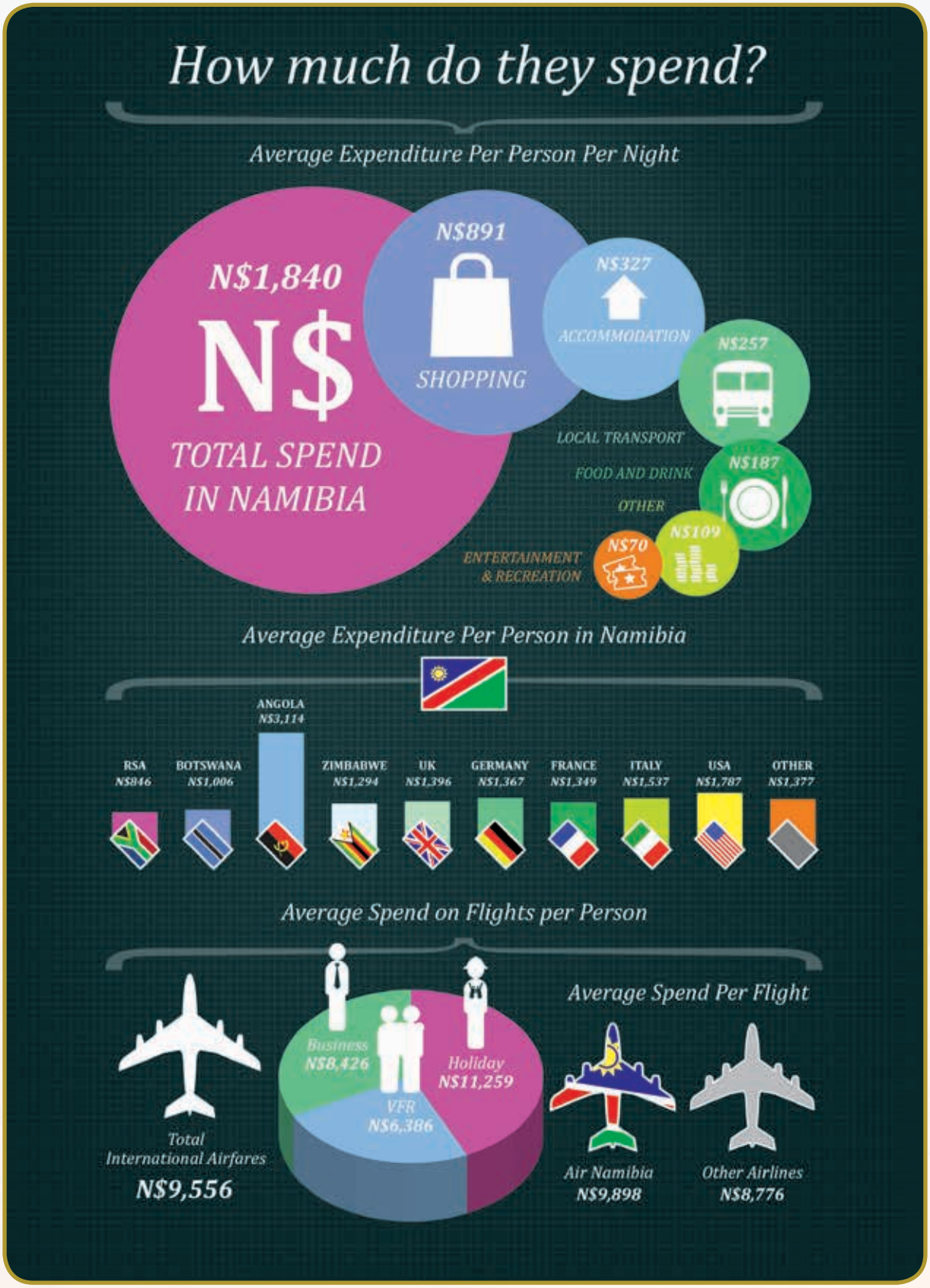








11. HOW MUCH DO THEY SPEND

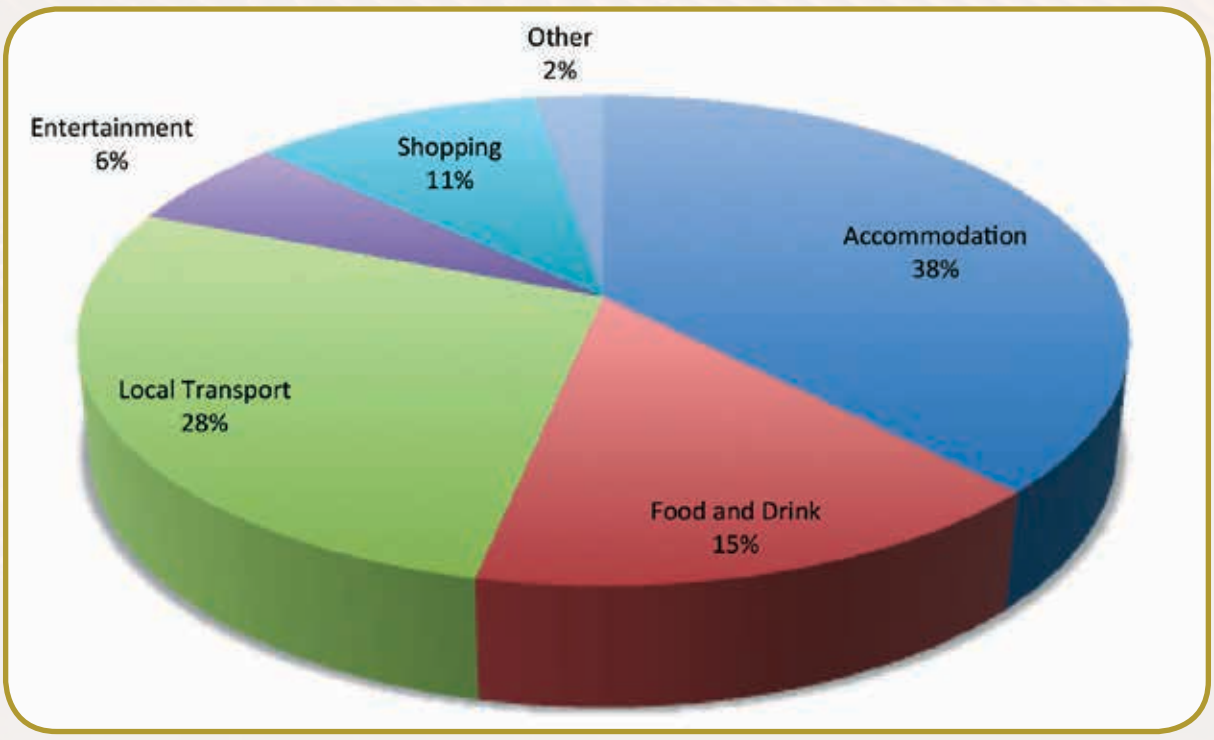


Key Facts:

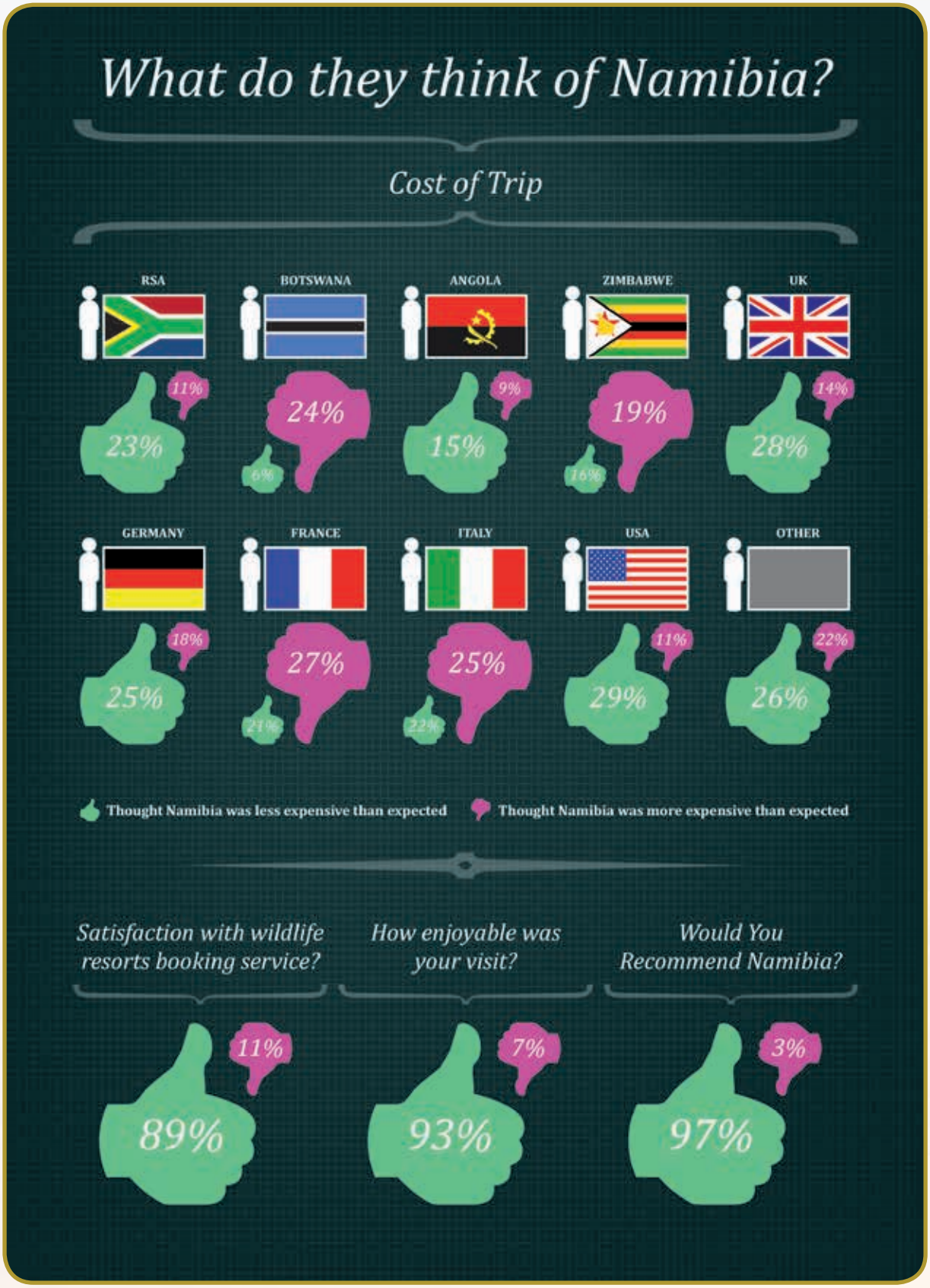
- The average expenditure of all tourists visiting Namibia was N$ 1,840 per night. However, those visiting for holidays spent less than that, at N$ 1,267 per night.
- As is typical, VFR tourists spend less than leisure tourists (N$ 865 per night), largely due to their lower expenditure on accommodation.
- Business tourists spend more than any other tourists, by purpose of visit. On average they spend N$ 3,486 per night.
- Of the key markets, tourists from South Africa spend the least, at N$ 846 per night, with those from Angola spending the most, averaging N$ 3,114 per night. This is mainly due to the high expenditure on shopping all from the African markets other than South Africa.
- Tourists from the USA spend more than any of the key European markets (N$ 1,787 per night). Italian tourists spend around N$ 200 per night more than tourists from Germany, the UK and France.
- For those tourists arriving and/or departing by air, the average airfare was N$ 9,556. Those using Air Namibia spent an average of N$ 9,898 whilst those using other airlines spent an average of N$ 8,776. The higher expenditure on Air Namibia is largely due to a greater proportion of flights being long haul (predominantly to Frankfurt).
- Just over 13% of all tourists travel to Namibia on a package that they bought prior to arriving in the country.

Expenditure of Holiday Tourists

Accommodation is the largest element of holiday tourist expenditure, making up 38% of total spend; this is followed by local transport (28%) and food/drink (15%).



12. WHAT DO THEY THINK OF NAMIBIA?



Key Facts:

- Almost two-thirds (65%) of all tourists thought that the cost of travel in Namibia was about the same as they expected. More tourists (20%) thought it was less expensive than expected than those who thought it was more expensive than expected (14%). Tourists from Botswana, France and Italy were most likely to think that Namibia was more expensive than expected.

- Holiday tourists were most satisfied with their visit to Namibia, with 85% rating it as "Very Enjoyable". Overall, over two-thirds of all tourists (68%) rated their visit as "Very Enjoyable". Tourists who rated Namibia the highest were from the USA (93%), Germany (88%), and France (88%).

- Only 11% of all tourists booked accommodation though Namibia Wildlife Resorts (NWR). However, of those who did, 46% said they were "Highly Satisfied", and a further 43% said they were "Satisfied" with the service.

- An extremely high 86% of all tourists stated that they would "Definitely" recommend Namibia to their friends and family. There was a consistent high score across all countries of residence (all in the high 80% or 90% range) with the exception of Angola, of which only 74% of all tourists said they would definitely recommend it.



Best Experience

The word cloud for the best experience of all tourists shows *Bird Watching, People, Nature, Beautiful Landscape, Friendly* and *Weather* were most frequently mentioned.

Best Experience Word Cloud: All Tourists



Tourists from Europe most frequently mentioned *Bird Watching, Wildlife* and *Etosha* when recalling their best experiences.

Best Experience Word Cloud: Tourists from Europe



Tourists from Africa most frequently mentioned *Friendly People* and *Friends* when recalling their best experiences.

Best Experience Word Cloud: Tourists from Africa



Leisure tourists most frequently mentioned *Wildlife, Bird Watching, Beautiful Landscape, Weather, Nature* and *Etosha* when recalling their best experiences.

Best Experience Word Cloud: Leisure Tourists



Worst Experience

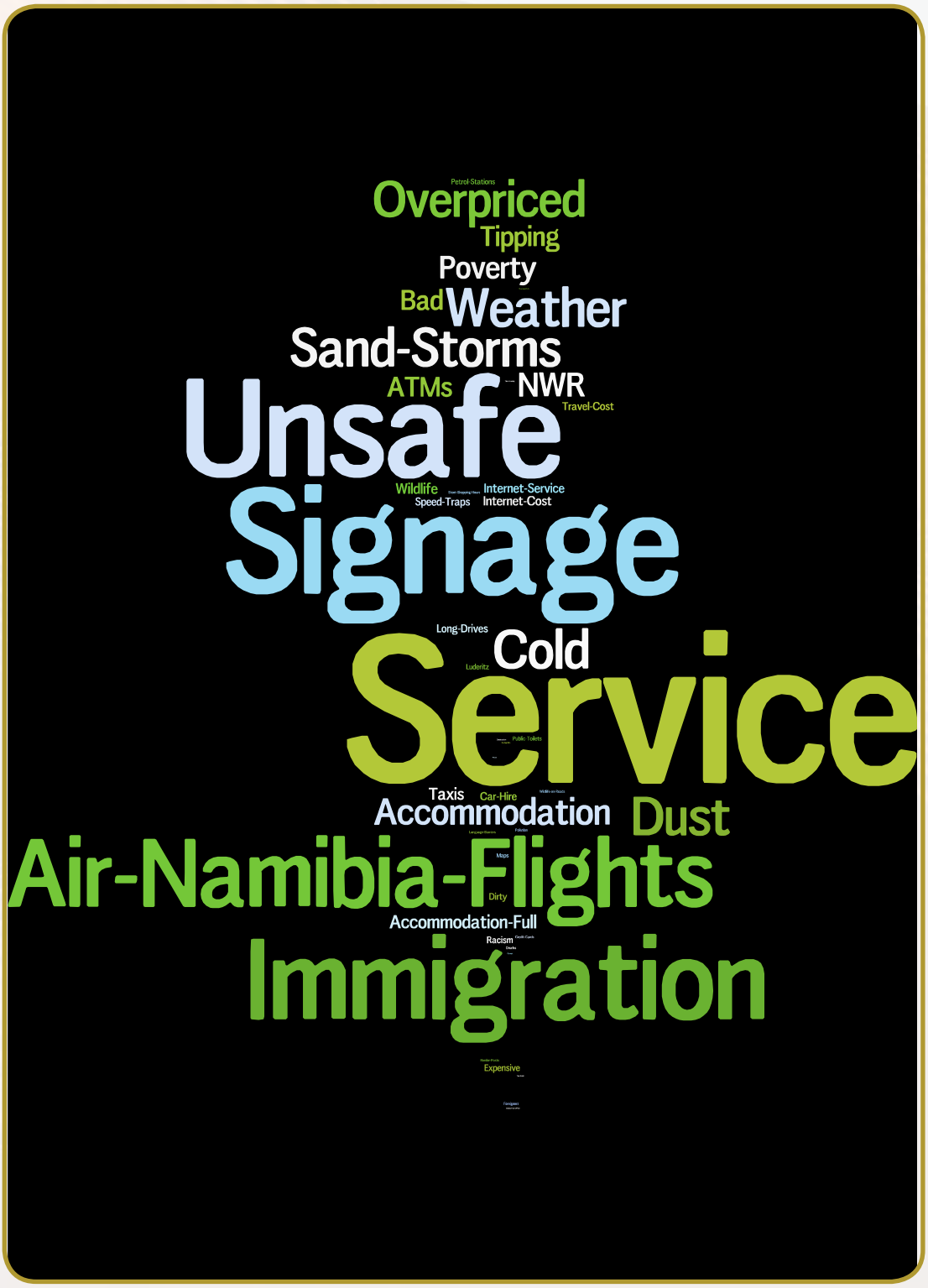
The word cloud for the worst experience of all tourists shows *Immigration*, feeling *Unsafe*, and bad *Service* as the most frequently mentioned.

Worst Experience Word Cloud: All Tourists



Tourists from Europe most frequently mentioned bad *Service*, feeling *Unsafe*, and lack of *Signage* as their worst experiences or disappointments.

Worst Experience Word Cloud: Tourists from Europe



Tourists from Africa most frequently mentioned *Immigration* and feeling *Unsafe* when recalling their worst experiences or disappointments.

Worst Experience Word Cloud: Tourists from Africa



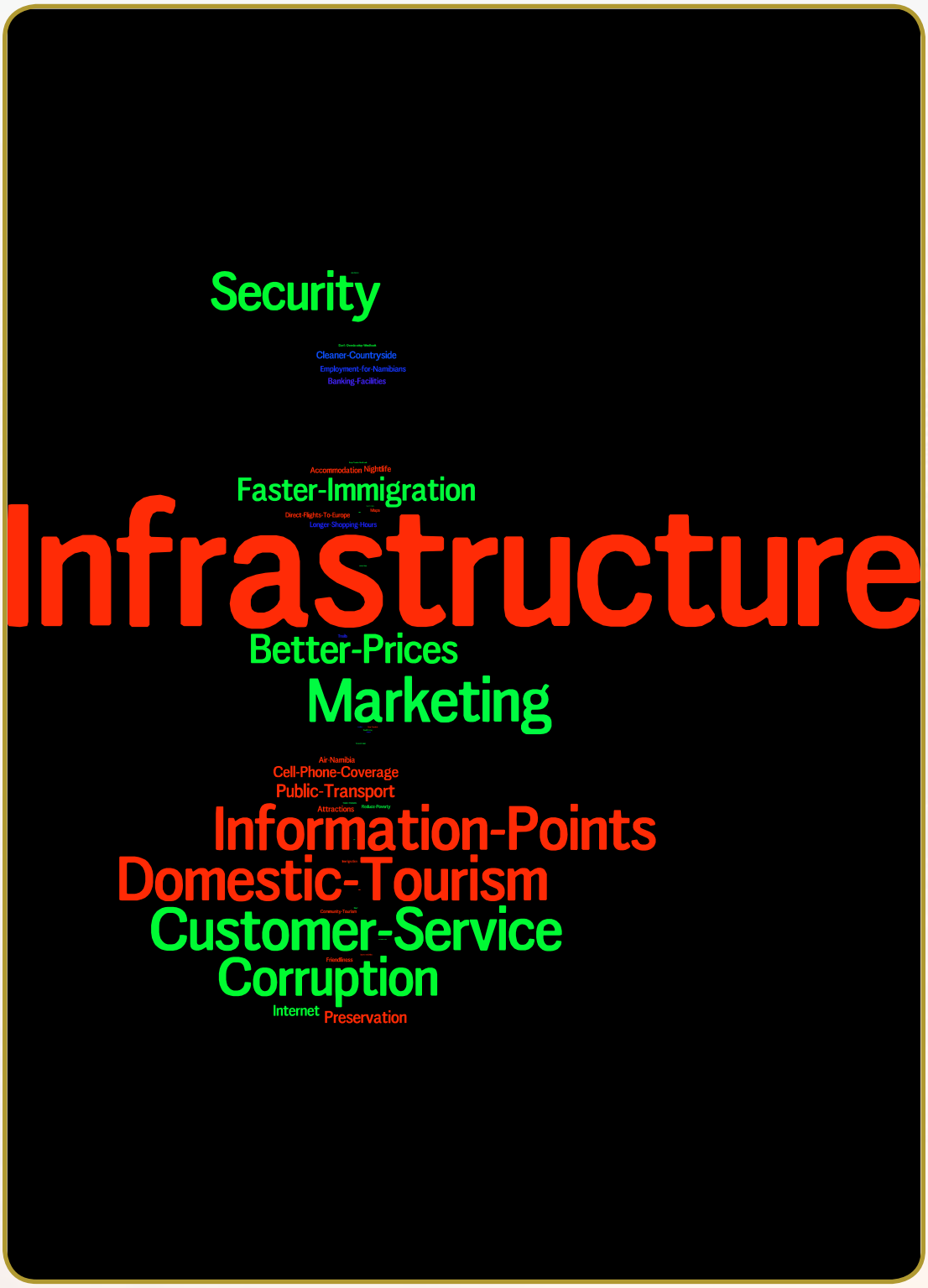
Leisure tourists most frequently mentioned bad *Service* and poor *Signage* when recalling their worst experiences or disappointments.

Worst Experience Word Cloud: Leisure Tourists



Improvements to Namibia as a Tourism Destination

The word cloud for the suggested improvements for Namibia as a tourism destination shows *Infrastructure* as by far the most commonly mentioned issue. Improvements to *Customer Service,* addressing *Corruption*, introducing *Information Points,* better *Marketing*, and promoting/ encouraging *Domestic Tourism* were also mentioned by many tourists.



13. COMPARISON WITH 2002 SURVEY

Introduction

The previous visitor survey undertaken in Namibia was carried out in 2002. In this section, comparisons are made between the findings of the 2002 and the 2012-2013 surveys.

When interpreting the changes, the reader should be aware of the methodological differences between the two surveys - with the main one being that the 2002 survey did not include any of the border posts with Angola. This has an impact on expenditure, as well as other activities that are popular with visitors from Angola (medical tourism and visits to Oshikati and surrounding area to name two).

The 2002 survey consisted of a sample size of 2,447 completed interviews – these were a mix of enumerator-assisted and self-completion. The survey was carried out at Hosea Kutako International Airport, Walvis Bay Airport, Buitepos, Ariamsvlei, Noordoewer and Ngoma. The 2012-2013 survey consisted of a sample size of 6,500 completed interviews, all of which were enumerator-assisted. This survey was executed at Hosea Kutako International Airport, Walvis Bay Airport, Buitepos, Wanela, Oshikango, Ariamsvlei, and Noordoewer.

Country of Residence

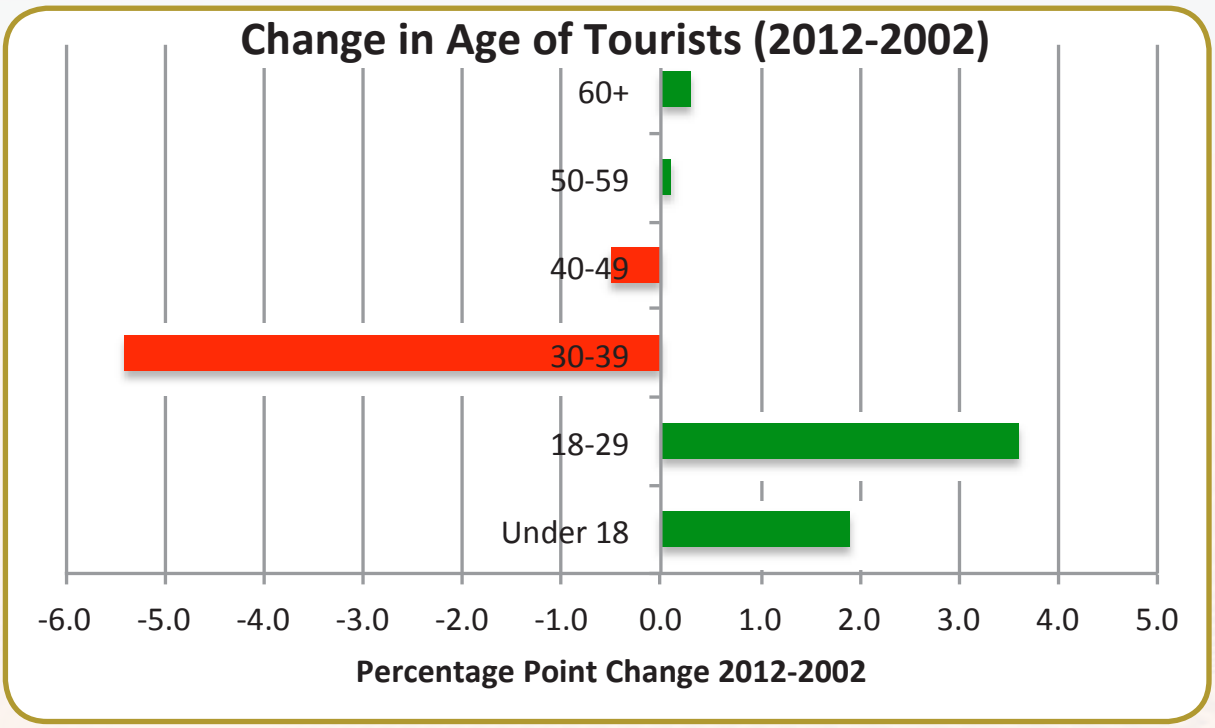
There has been a broadening in the market for arrivals to Namibia over the last ten years, with the top 4 countries generating a smaller proportion of all tourist arrivals.

Country of Residence	2002 (%)	2012/2013 (%)	Change (%)
RSA	42.7	28.3	-14.4
Germany	9.8	7.7	-2.1
UK	2.9	1.9	-1.0
USA	2.9	1.6	-1.3
Other	41.7	60.5	18.8
Total	100.0	100.0	



Age Profile

Overall the age of tourists has spread out across the age groups, with fewer 30 to 49 year olds, and more under 29s and over 50s.



Age Group	2002 (%)	2012/2013 (%)	Change (%)
Under 18	7.5	9.4	1.9
18-29	16.9	20.5	3.6
30-39	28.5	23.1	-5.4
40-49	20.3	19.8	-0.5
50-59	16.5	16.6	0.1
60+	10.3	10.6	0.3
Total	100.0	100.0	



Previous Visits

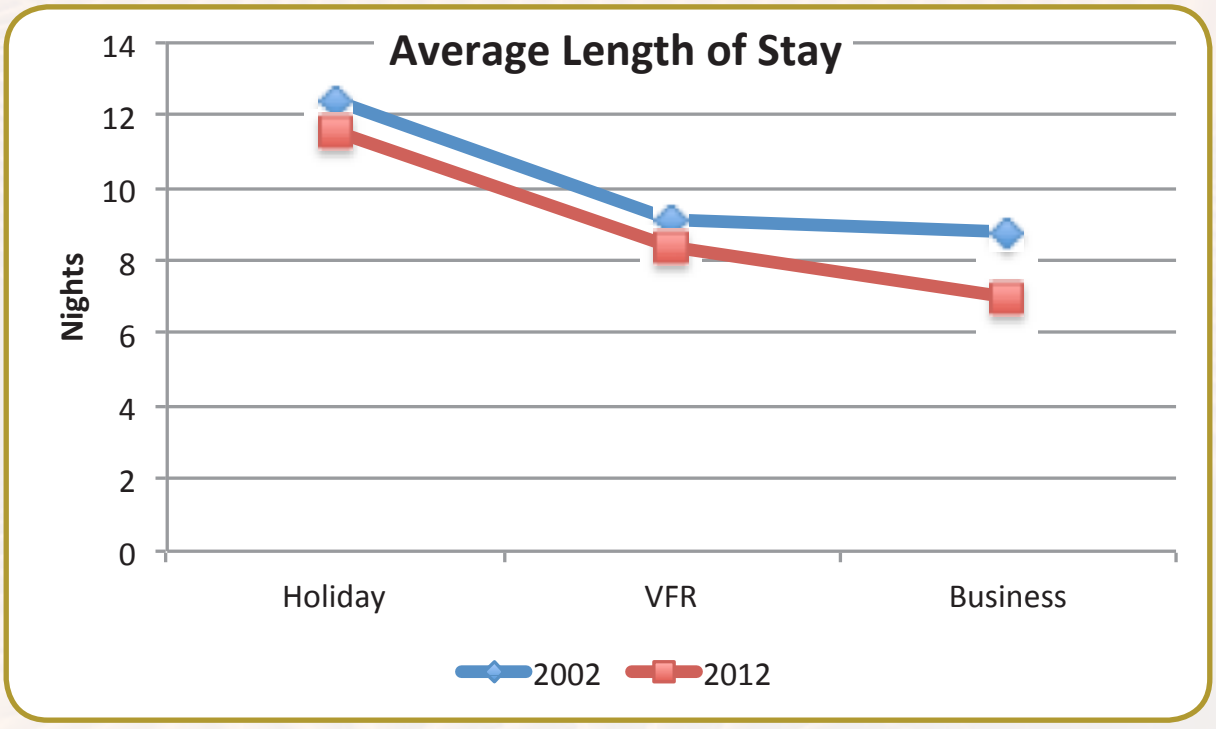
A considerably higher percentage of tourists are now visiting Namibia who have visited before. However, it would appear that there has been a sharp growth in first time arrivals from the USA.

Visited Namibia Before	2002 (%)	2012/2013 (%)	Change (%)
Yes	45.7	68.5	22.8
No	54.3	31.5	-22.8
All	100.0	100.0	0

First Visit?	2002 (%)	2012/2013 (%)	Change (%)
RSA	26.7	20.6	-6.1
Germany	69.5	62.5	-7
UK	79.4	69.2	-10.2
USA	50.5	80.5	30.0

Length of Stay

Tourists are staying for a shorter period than they did 10 years ago. On average tourists stayed around 2 nights less in 2012 than they did in 2002.



Length of Stay	2002 (nights)	2012/2013 (nights)	Change (nights)
Holiday	12.4	11.6	-0.8
VFR	9.1	8.4	-0.7
Business	8.8	7.0	-1.8
All	11.0	9.1	-1.9

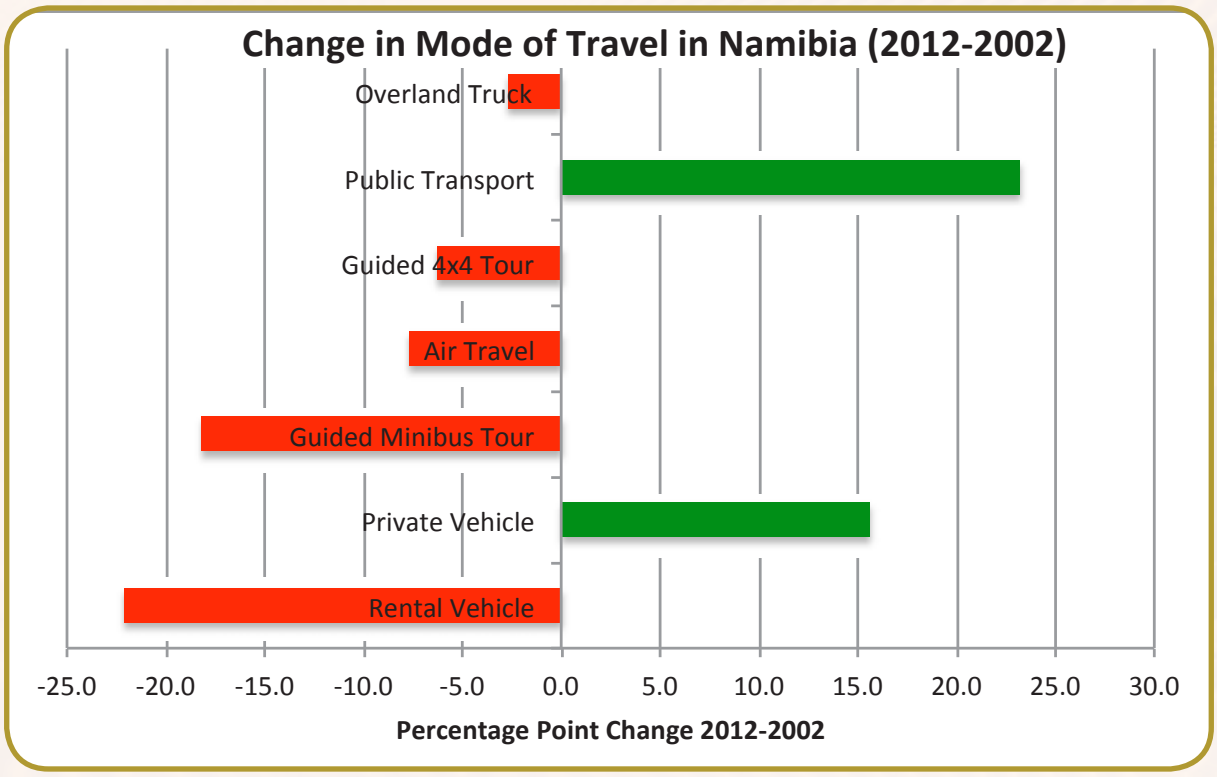
Airline Used to Exit Namibia

There appears to be fewer tourists using BA/Comair in 2012 than 10 years previously. There has been a strong growth in the use of SAA/SA Express.

Airline Used to Exit Namibia	2002 (%)	2012/2013 (%)	Change (%)
SAA/SA Express	43.2	53.1	9.9
Air Namibia	30.9	36.0	5.1
BA/Comair	19.2	4.0	-15.2
Other	6.7	6.9	0.2
All	100.0	100.0	

Type of Transport Used

There appears to have been a significant increase in the usage of private vehicles for travelling around Namibia, and also public transport, over the 10-year period. This is likely to be partly due to the inclusion of interviews at the Angola border.

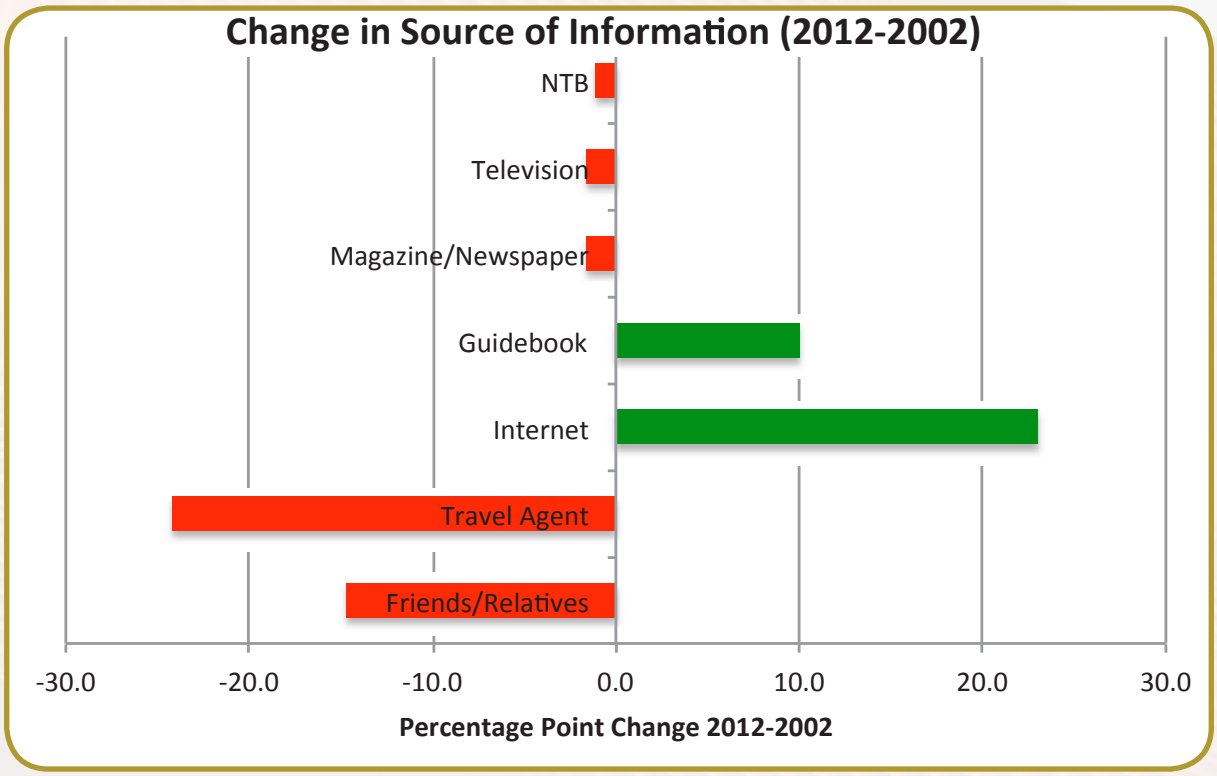


Mode of Travel in Namibia	2002 (%)	2012/2013 (%)	Change (%)
Rental Vehicle	42.3	20.2	-22.1
Private Vehicle	31.2	46.8	15.6
Guided Minibus Tour	20.8	2.6	-18.2
Air Travel	8.5	0.8	-7.7
Guided 4x4 Tour	7.6	1.3	-6.3
Public Transport	6.7	29.9	23.2
Overland Truck	4.2	1.5	-2.7

Booking Process

Significantly, there has been an increase in the proportion of tourists booking their trip themselves, as well as using the Internet as a source of information on Namibia.

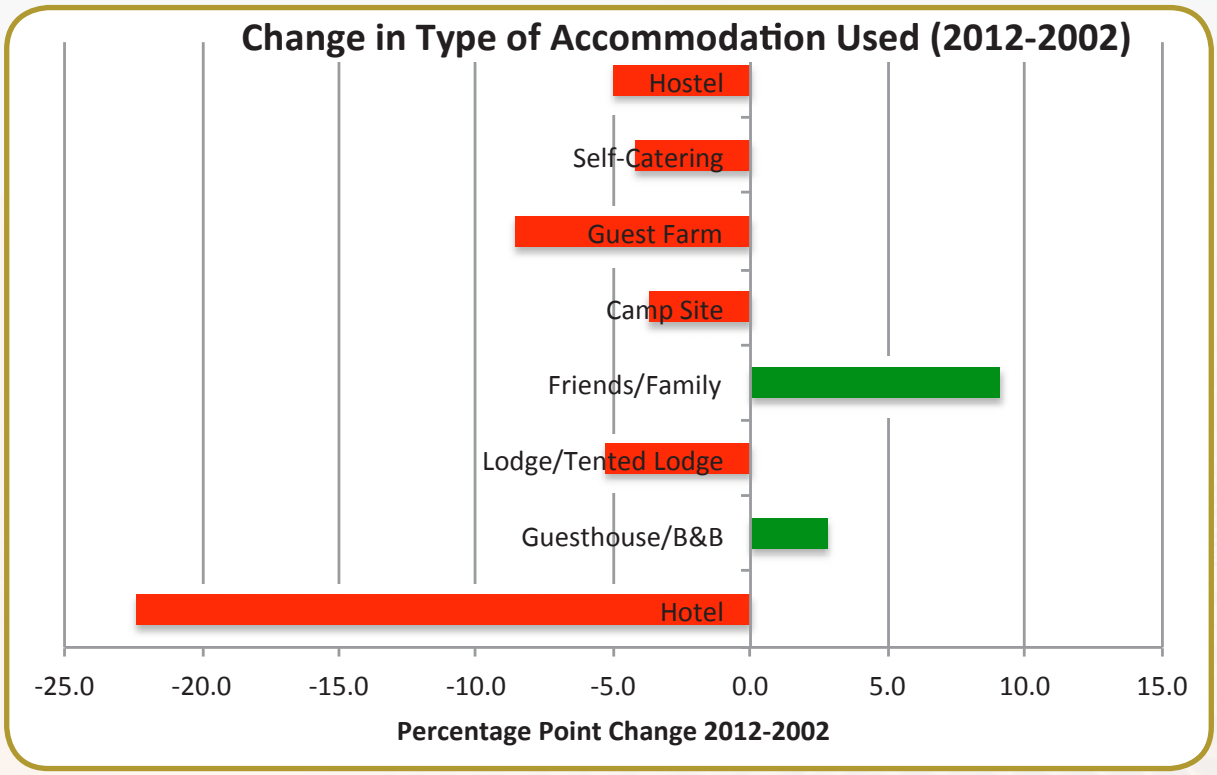
Booking Process	2002 (%)	2012/2013 (%)	Change (%)
Self	57.0	66.0	9.0
Travel Agent/Tour Operator	43.0	22.0	-21.0
Other	0.0	12.0	12.0



Sources of Information	2002 (%)	2012/2013 (%)	Change (%)
Friends/Relatives	50.8	36.1	-14.7
Travel Agent	39.0	14.8	-24.2
Internet	37.5	60.5	23.0
Guidebook	31.8	41.8	10.0
Magazine/Newspaper	11.5	9.9	-1.6
Television	9.8	8.2	-1.6
NTB	6.7	5.6	-1.1
Previous Visit	-	32.7	-

Type of Accommodation

The popularity of hotels appears to have declined since 2002, although there appears to be an overall decline in the use of different types of accommodation. Because tourists could select more than one type of accommodation when answering this question, it is possible that in 2012 tourists were more likely to use one type of accommodation when travelling around, as opposed to many different types in 2002.



Type of Accommodation Used	2002 (%)	2012/2013 (%)	Change (%)
Hotel	39.8	17.4	-22.4
Guesthouse/B&B	32.4	35.2	2.8
Lodge/Tented Lodge	29.3	24.0	-5.3
Friends/Family	22.1	31.2	9.1
Camp Site	19.8	16.1	-3.7
Guest Farm	13.8	5.2	-8.6
Self-Catering	8.2	4.0	-4.2
Hostel	6.8	1.8	-5.0

Locations Visited

Whilst the locations tourists visit have broadly remained the same, the proportion of tourists visiting each place seems to have declined. The apparent growth in tourist visits to Oshakati is due to the interviewing on the Angola border in 2012-2013.

Locations Visited	2002 (%)	2012/2013 (%)	Change (%)
Windhoek	82.1	55.6	-26.5
Swakopmund	49.9	30.3	-19.6
Walvis Bay	36.7	25.2	-11.5
Etosha	31.7	22.1	-9.6
Sossusvlei/Sesreim	23.6	18.1	-5.5
Namib Naukluft Park	18.6	9.8	-8.8
Fish River Canyon	15.8	11.4	-4.4
Damaraland	15.6	10.2	-5.4
Luderitz	10.3	7.2	-3.1
Spitzkoppe	10.1	6.7	-3.4
Oshakati and Area	4.6	23.0	18.4



Activities Undertaken

There appears to have been a general decline in the proportion of tourists undertaking each of the activities, although this may be due to differences in the survey methodologies.

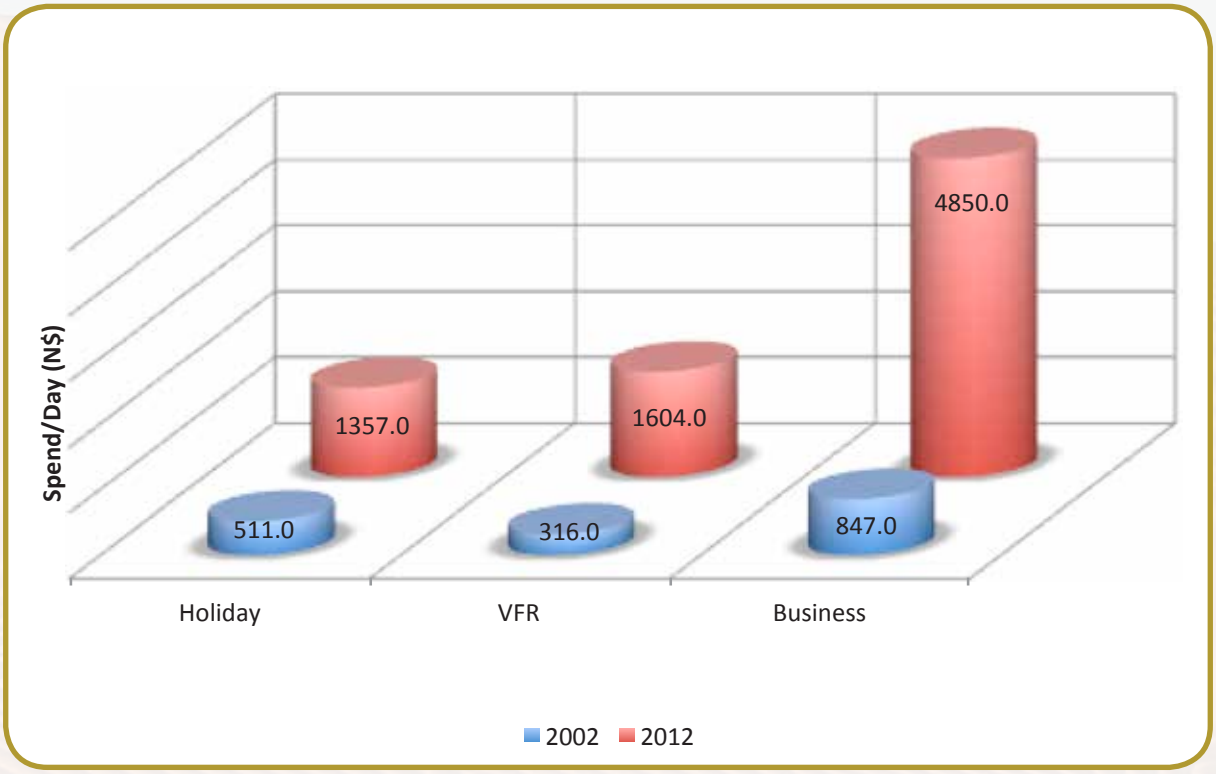
Activities Undertaken	2002 (%)	2012/2013 (%)	Change (%)
Shopping	58.8	53.5	-5.3
Game Viewing	45.2	29.1	-16.1
Nature/Landscape Touring	41.9	26.1	-15.8
Historical/Archaeological Sites	29.3	8.9	-20.4
Hiking/Trekking	20.6	13.9	-6.7
Bird Watching	18.3	9.8	-8.5
Adventure Sports	15.7	7.5	-8.2
Cultural Tours	14.1	8.7	-5.4
Fishing	8.9	6.2	-2.7
Horse/Camel Riding	3.7	2.0	-1.7
Hunting	2.0	2.4	0.4
None	18.1	21.6	3.5

Main Activity Undertaken	2002 (%)	2012/2013 (%)	Change (%)
Nature/Landscape Touring	31.8	9.5	-22.3
Game Viewing	25.9	13.0	-12.9
Shopping	10.5	1.9	-8.6
Fishing	8.0	1.3	-6.7
Adventure Sports	7.2	1.9	-5.3
Hunting	3.8	1.4	-2.4
Visiting Family/Friends	3.1	0.2	-2.9



Expenditure

Overall, trip expenditure appears to have increased by an average of 15.6% per annum over the last 10 years, although the increases in expenditure of tourists from the key European markets, and the USA, are somewhat lower, at around 4%-8%.



Expenditure per Person per Day	2002 (N$)	2012/2013 (N$)	Average Annual Growth Rate (%)
Holiday	511.0	1,357.0	10.3
VFR	316.0	1,604.0	17.6
Business	847.0	4,850.0	19.1
RSA	493.0	905.0	6.3
Germany	749.0	1,552.0	7.6
UK	624.0	1,396.0	8.4
USA	1,179.0	1,787.0	4.2
All	578	2,456.0	15.6

14. TURNING FINDINGS INTO ACTIONS

The findings, and possible resulting actions from the Tourist Exit Survey, are many. Different users will look at different aspects of the survey to make their own decisions, whether they be for marketing, planning, policy-making or any others reasons.

However, below are some lessons that can be learnt from the survey, and possible actions that could be put in place to further develop the tourism sector in Namibia.

Finding	Action
Shopping is a significant activity for African (other than South African) visitors.	Exploit these tourists further by encouraging them to stay longer and do other things. Special offers from accommodation establishments would be one way to do this.
Tourists from South Africa make up 36% of all leisure tourists to Namibia.	Whilst these visitors spend less than leisure visitors from Europe and the United States, they are a market that should be looked after. They will be more resilient to economic downturns than the European and North American markets, and in times of recession in those countries, South African visitors might provide a lifeline for tourism businesses.
Around 50% of all leisure visitors have not been to Namibia before, and first time visitors spend considerably longer in the country than those who have been before.	Seek out new holiday markets, as the first time visitor has a greater impact on the country in terms of expenditure than those who have visited before.
There are a broad range of age groups visiting Namibia.	Be prepared to welcome all age groups and look after their individual needs – they will all seek different things depending on their ages. The older age groups often have time and money, the younger age groups are tomorrow's older age groups, who might return with time and money.
European holiday tourists consider Kenya and Tanzania as alternative destinations, whilst those from Africa tend to consider South Africa and Botswana.	The survey findings show that tourists are already linking up with South Africa and Botswana to create a southern Africa tour. There appears to be an opportunity to offer two-centre holidays with the eastern African destinations to the European markets.
One quarter of holiday tourists stated *Nature/Landscape Touring* as their main activity, second only to game viewing (34%). Tourists also stated that *infrastructure* was the most important thing to address in order to improve Namibia as a tourist destination.	Roads and accommodation are important elements of touring as they determine the level of comfort the tour can be conducted in. It would appear that an improvement in both is required to move the tourism sector more upmarket.
Tourists from the USA spend more than those from Europe, although they tend to stay for 2-3 days less.	Increase marketing to the United States, although at the same time try to increase their length of stay by encouraging them to spend less time in neighbouring countries.

Overall, satisfaction with Namibia as a tourist destination is high, however safety (from theft and road accidents) is a concern. Nevertheless, this must be kept in perspective – it was only mentioned by 3.5% of all respondents.	Increase awareness of basic safety and security through well designed, non-alarmist but sensible leaflets placed in accommodation bedrooms.
Immigration, especially at land borders, was an area that caused high dissatisfaction amongst those who reported bad experiences.	Train immigration officers in politeness and basic courtesy.
Signage and information points were often mentioned by a number of tourists as possible improvements.	Improve signage and increase the number of tourist information points in the country. Alternatively explore the possibility of developing some tourism apps for iPhone/Android that can be used as guides for sites, accommodation and directions.

APPENDICES



A. Detailed Tables

A.1 WHO VISITS NAMIBIA?

A.1.1 Country of Residence and Purpose of Visit

Country of Residence	Total (%)	Holiday (%)	VFR (%)	Business (%)	Medical (%)	Other (%)
RSA	28.3	36.3	35.7	19.2	0.1	6.2
Botswana	3.6	0.8	6.3	4.9	1.0	9.5
Angola	35.8	10.2	37.7	51.4	98.9	69.0
Zimbabwe	4.1	0.8	3.2	10.9	0.0	2.3
United Kingdom	1.9	3.4	0.6	1.5	0.0	0.0
Germany	7.7	16.6	3.4	1.8	0.0	1.0
France	1.4	3.1	0.2	0.4	0.0	0.3
Italy	1.1	2.7	0.0	0.2	0.0	0.0
USA	1.6	3.3	0.6	0.7	0.0	0.0
Other	14.6	22.7	12.2	9.2	0.0	11.7
Total	100.0	100.0	100.0	100.0	100.0	100.0

Country of Residence	Total (%)	Holiday (%)	VFR (%)	Business (%)	Medical (%)	Other (%)
RSA	100.0	49.5	31.4	18.5	0.0	0.5
Botswana	100.0	9.2	44.4	37.9	1.9	6.7
Angola	100.0	11.0	26.3	39.3	18.6	4.8
Zimbabwe	100.0	7.3	19.4	71.8	0.0	1.4
United Kingdom	100.0	70.1	8.5	21.4	0.0	0.0
Germany	100.0	82.5	10.9	6.2	0.0	0.3
France	100.0	87.6	4.1	7.7	0.0	0.6
Italy	100.0	95.2	0.7	4.1	0.0	0.0
USA	100.0	79.0	9.4	11.6	0.0	0.0
Other	100.0	60.0	20.8	17.2	0.0	2.0
Total	100.0	38.5	24.9	27.3	6.7	2.5

Purpose of Visit	All (%)	RSA (%)	Botswana (%)	Angola (%)	Zimbabwe (%)	UK (%)	Germany (%)	France (%)	Italy (%)	USA (%)	Other (%)
Holiday	38.5	49.5	9.2	11.0	7.3	70.1	82.5	87.6	95.2	79.0	60.0
VFR	24.9	31.4	44.4	26.3	19.4	8.5	10.9	4.1	0.7	9.4	20.8
Business	27.3	18.5	37.9	39.3	71.8	21.4	6.2	7.7	4.1	11.6	17.2
Medical	6.7	0.0	1.9	18.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other	2.5	0.5	6.7	4.8	1.4	0.0	0.3	0.6	0.0	0.0	2.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Purpose of Visit	All (%)	Africa (%)	Europe (%)	Americas (%)	Asia/ME (%)
Holiday	38.5	25.2	83.6	78.2	63.8
VFR	24.9	30.4	6.8	10.3	7.6
Business	27.3	32.4	9.1	11.5	28.6
Medical	6.7	8.8	0.0	0.0	0.0
Other	2.5	3.1	0.5	0.0	0.0
Total	100.0	100.0	100.0	100.0	100.0

A.1.2 Nationality

Nationality	Country of Residence									
	RSA (%)	Botswana (%)	Angola (%)	Zimbabwe (%)	UK (%)	Germany (%)	France (%)	Italy (%)	USA (%)	Other (%)
South Africa	94.7	5.6	0.1	3.7	10.1	1.0	0.0	0.0	1.9	1.9
Botswana	0.1	84.1	0.0	0.5	0.6	0.1	0.0	0.0	0.0	0.1
Angola	0.4	0.8	97.6	0.5	0.0	0.0	0.0	0.0	0.0	0.3
Zimbabwe	0.4	2.0	0.0	93.0	1.9	0.1	0.0	0.0	0.6	0.3
United Kingdom	0.9	1.6	0.1	0.0	78.6	0.1	0.0	0.0	1.2	1.6
Germany	0.7	0.4	0.0	0.0	0.0	95.4	0.6	0.0	0.6	1.3
France	0.3	0.0	0.0	0.0	0.6	0.0	91.8	0.8	0.0	0.5
Italy	0.0	1.2	0.0	0.0	1.3	0.3	1.9	96.8	0.0	0.5
United States of America	0.3	0.4	0.2	0.5	2.5	0.3	0.0	0.0	91.9	1.6
Other Nationalities	2.2	4.0	2.1	1.9	4.4	2.7	5.7	2.4	3.7	91.9

A.1.3 First or Repeat Visit

Repeat Visit	All (%)	Holiday (%)	VFR (%)	Business (%)	Medical (%)	Other (%)
First Visit	31.5	51.6	17.0	20.6	20.4	18.3
Been Before	68.5	48.4	83.0	79.4	79.6	81.7
Total	100.0	100.0	100.0	100.0	100.0	100.0

Repeat Visit	RSA (%)	Botswana (%)	Angola (%)	Zimbabwe (%)	UK (%)	Germany (%)	France (%)	Italy (%)	USA (%)	Other (%)
First Visit	20.6	20.7	14.3	37.5	69.2	62.5	77.7	87.5	80.5	60.9
Been Before	79.4	79.3	85.7	62.5	30.8	37.5	22.3	12.5	19.5	39.1
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Repeat Visit	Africa (%)	Europe (%)	Americas (%)	Asia/ME (%)
First Visit	19.3	69.9	74.8	82.7
Been Before	80.7	30.1	25.2	17.3
Total	100.0	100.0	100.0	100.0

A.2 PROFILE OF TOURISTS

A.2.1 Age

Age	All (%)	Holiday (%)	VFR (%)	Business (%)	Medical (%)	Other (%)
0-5	2.0	1.3	4.1	0.2	7.1	0.0
6-11	3.2	3.3	4.1	1.4	3.3	1.0
12-17	4.2	5.0	4.2	1.8	2.6	3.4
18-29	20.5	18.3	24.1	22.9	24.5	25.1
30-39	23.1	19.3	25.1	34.2	26.6	33.3
40-49	19.8	20.0	17.4	23.8	15.4	19.3
50-59	16.6	19.5	12.4	11.4	14.4	12.1
60+	10.6	13.3	8.6	4.4	6.1	5.8
Total	100.0	100.0	100.0	100.0	100.0	100.0

Age	RSA (%)	Botswana (%)	Angola (%)	Zimbabwe (%)	UK (%)	Germany (%)	France (%)	Italy (%)	USA (%)	Other (%)
0-5	2.2	1.6	4.9	0.9	0.5	0.5	0.8	0.2	0.6	0.9
6-11	3.4	6.2	3.5	2.3	2.4	3.0	4.4	0.2	0.7	2.7
12-17	3.6	9.5	3.0	0.9	6.8	5.9	9.0	2.4	3.0	3.9
18-29	16.6	21.2	30.9	23.6	22.4	15.8	18.1	9.7	20.2	26.4
30-39	20.9	28.4	31.6	42.3	20.7	14.9	23.9	34.2	19.3	21.9
40-49	21.2	20.1	14.7	21.3	17.8	21.6	17.9	23.8	18.5	19.8
50-59	17.5	10.9	9.0	6.3	20.0	23.3	22.1	21.9	16.3	16.7
60+	14.6	2.1	2.4	2.6	9.3	15.0	3.8	7.5	21.5	7.7
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Age	Africa (%)	Europe (%)	Americas (%)	Asia/ME (%)
0-5	2.7	0.6	0.7	0.7
6-11	3.6	2.8	1.1	0.7
12-17	3.7	5.7	2.8	2.7
18-29	21.0	18.8	24.2	22.6
30-39	25.0	19.7	18.8	24.3
40-49	19.5	20.6	18.1	20.4
50-59	14.3	21.2	15.9	19.7
60+	10.2	10.6	18.3	9.0
Total	100.0	100.0	100.0	100.0

A.2.2 Gender

Gender	All (%)	Holiday (%)	VFR (%)	Business (%)	Medical (%)	Other (%)
Male	54.2	52.1	49.3	75.2	36.4	60.4
Female	45.8	47.9	50.7	24.8	63.6	39.6
Total	100.0	100.0	100.0	100.0	100.0	100.0

Gender	RSA (%)	Botswana (%)	Angola (%)	Zimbabwe (%)	UK (%)	Germany (%)	France (%)	Italy (%)	USA (%)	Other (%)
Male	58.7	58.9	46.1	75.9	52.2	49.3	48.8	50.0	49.3	53.2
Female	41.3	41.1	53.9	24.1	47.8	50.7	51.2	50.0	50.7	46.8
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Gender	Africa (%)	Europe (%)	Americas (%)	Asia/ME (%)
Male	56.4	50.1	48.9	56.1
Female	43.6	49.9	51.1	43.9
Total	100.0	100.0	100.0	100.0

A.2.3 Group Size

Group Size	All (%)	Holiday (%)	VFR (%)	Business (%)	Medical (%)	Other (%)
Alone	43.2	14.9	49.4	72.6	55.0	64.6
Group (2 or more)	56.8	85.1	50.6	27.4	45.0	35.4
Total	100.0	100.0	100.0	100.0	100.0	100.0

Group Size	RSA (%)	Botswana (%)	Angola (%)	Zimbabwe (%)	UK (%)	Germany (%)	France (%)	Italy (%)	USA (%)	Other (%)
Alone	43.2	31.2	44.9	60.6	61.9	39.3	25.1	11.9	9.0	20.8
Group (2 or more)	56.8	68.8	55.1	39.4	38.1	60.7	74.9	88.1	91.0	79.2
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Group Size	Africa (%)	Europe (%)	Americas (%)	Asia/ME (%)
Alone	49.2	22.7	26.3	34.0
Group (2 or more)	50.8	77.3	73.7	66.0
Total	100.0	100.0	100.0	100.0

Age by Group	Alone (%)	Group (%)
0-5	0.0	2.4
6-11	0.0	3.8
12-17	0.2	5.0
18-29	27.7	19.1
30-39	30.9	21.6
40-49	22.1	19.3
50-59	12.8	17.3
60+	6.3	11.5
Total	100.0	100.0

Group Size	Holiday (%)	VFR (%)	Business (%)	Medical (%)	Other (%)
2	54.8	55.9	68.2	63.8	51.4
3	12.5	20.2	15.8	21.1	8.1
4	17.1	15.8	9.5	9.2	18.9
5	5.2	5.2	2.1	3.2	0.0
6	3.3	1.8	1.6	1.8	13.5
7+	7.1	1.3	2.9	0.9	8.1
Total	100.0	100.0	100.0	100.0	100.0

Group Size	RSA (%)	Botswana (%)	Angola (%)	Zimbabwe (%)	UK (%)	Germany (%)	France (%)	Italy (%)	USA (%)	Other (%)
2	55.2	47.1	57.8	69.9	60.0	61.1	52.5	65.8	50.0	56.8
3	14.6	25.7	21.7	14.5	9.5	11.5	8.6	7.0	15.2	12.5
4	18.5	16.2	11.6	12.0	12.6	13.2	20.9	12.3	15.2	14.3
5	5.1	3.7	4.6	1.2	5.3	5.6	7.2	0.9	0.9	4.8
6	3.1	3.7	2.3	0.0	2.1	2.7	1.4	2.6	3.6	3.3
7+	3.5	3.7	2.0	2.4	10.5	5.9	9.4	11.4	15.2	8.3

Group Size	Africa (%)	Europe (%)	Americas (%)	Asia/ME (%)
2	55.9	60.1	48.6	49.4
3	16.9	10.1	15.8	15.7
4	16.4	14.6	15.8	9.6
5	4.6	5.1	1.4	9.6
6	2.9	2.4	4.1	4.8
7+	3.2	7.7	14.4	10.8
Total	100.0	100.0	100.0	100.0

A.3 HOLIDAY PLANNING (LEISURE ONLY)

A.3.1 What Attracted Them to Namibia?

What Attracted Them to Namibia?	All (%)	RSA (%)	Angola (%)	UK (%)	Germany (%)	France (%)	Italy (%)	USA (%)	Other (%)
Wildlife	67.1	49.6	39.7	80.3	90.6	95.3	95.2	76.7	82.3
Scenery	61.3	65.9	25.3	70.5	63.6	66.2	70.6	64.5	65.2
Culture	40.1	23.8	11.4	53.7	64.4	57.2	62.3	46.0	54.3
Sense of Space	35.7	34.5	35.0	33.0	39.4	46.1	47.9	26.5	34.4
Diversity of Attractions	29.7	27.5	60.0	14.8	28.8	29.4	24.5	17.8	25.6
Tranquillity	28.9	27.7	11.3	32.1	34.3	26.3	26.4	40.0	34.8
Curiosity	22.2	19.1	11.2	26.5	22.9	26.5	22.9	42.6	28.0
Climate	20.7	20.4	11.9	35.0	24.8	22.4	17.2	19.2	21.0
Safety and Security	19.4	14.1	41.7	12.7	19.3	26.5	20.4	13.5	19.4
Value for Money	9.5	2.7	68.9	0.0	1.1	0.0	1.5	5.2	2.9
Shopping	4.6	5.9	4.6	11.2	2.9	0.8	0.9	8.1	3.3
Niche Hobbies	4.3	2.6	20.2	1.4	2.7	2.7	3.8	1.6	2.4
Community-based Conservancies	4.2	0.5	35.4	0.0	0.3	0.0	0.0	0.5	1.5
Infrastructure	3.3	5.1	0.2	3.4	2.8	0.7	0.7	5.0	2.8
Medical Facilities	3.0	3.1	0.4	1.7	3.2	5.4	5.9	6.2	3.1
Hunting	0.4	1.1	0.0	0.0	0.2	0.7	0.0	0.0	0.0
Fishing	0.3	0.6	0.0	0.6	0.2	0.0	0.0	2.1	0.0
Clean Environment	0.1	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Closer to RSA	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0

What Attracted Them to Namibia?	All (%)	Africa (%)	Europe (%)	Americas (%)	Asia/ME (%)
Wildlife	67.1	47.0	89.0	76.1	81.0
Scenery	61.3	56.1	66.8	64.9	66.0
Culture	40.1	21.3	60.7	49.4	50.4
Sense of Space	35.7	34.2	39.2	25.1	28.5
Diversity of Attractions	29.7	33.9	26.7	16.9	25.2
Tranquillity	28.9	24.4	32.7	39.2	35.2
Curiosity	22.2	17.5	24.3	42.0	38.6
Climate	20.7	18.3	23.5	19.7	22.3
Safety and Security	19.4	19.8	19.8	14.1	15.2
Value for Money	9.5	17.5	1.1	4.1	0.9
Shopping	4.6	5.3	3.5	6.6	4.9
Niche Hobbies	4.3	6.2	2.6	1.6	0.9
Community-based Conservancies	4.2	8.2	0.1	0.3	0.0
Infrastructure	3.3	3.8	2.6	5.6	0.9
Medical Facilities	3.0	2.7	3.2	4.2	4.9
Hunting	0.4	0.8	0.1	0.0	0.0
Fishing	0.3	0.4	0.1	1.4	0.0
Clean Environment	0.1	0.2	0.0	0.0	0.0
Closer to RSA	0.0	0.0	0.0	0.0	0.0

A.3.2 What Other Countries Did They Consider?

Other Countries Considered (Top 10)	All (%)	RSA (%)	Germany (%)	Other (%)
South Africa	21.8	0.0	28.4	23.2
Botswana	20.3	31.6	20.7	18.6
Tanzania	19.2	12.9	16.7	20.8
Kenya	16.5	6.1	17.6	17.7
Zimbabwe	13.4	38.1	11.1	10.3
Zambia	11.6	14.3	14.0	10.6
Mozambique	8.9	14.8	8.1	8.3
Angola	6.2	20.1	2.1	5.3
Ghana	3.3	0.0	3.4	3.7
Malawi	3.1	0.0	1.7	3.9

Other Countries Considered (Top 10)	All (%)	Africa (%)	Europe (%)	Other (%)
South Africa	21.8	11.9	28.1	11.0
Botswana	20.3	23.0	19.9	17.4
Tanzania	19.2	17.4	19.3	21.7
Kenya	16.5	3.3	21.6	17.0
Zimbabwe	13.4	17.4	9.9	22.2
Zambia	11.6	9.8	12.8	9.7
Mozambique	8.9	16.1	5.3	12.8
Angola	6.2	18.7	1.5	5.3
Ghana	3.3	4.4	3.0	2.2
Malawi	3.1	7.5	1.3	3.1

A.3.3 Sources of Information Used to Learn About Namibia

Sources of Information	All (%)	RSA (%)	Angola (%)	UK (%)	Germany (%)	France (%)	Italy (%)	USA (%)	Other (%)
Internet	60.5	50.1	29.8	72.2	71.5	72.6	71.3	75.0	77.1
Guide Books	41.8	23.3	2.6	53.9	65.8	72.2	61.5	56.9	62.0
Friends/Relatives	36.1	30.4	61.4	29.3	40.5	35.0	34.9	31.6	33.4
Previous Visit	32.7	47.2	70.3	8.4	21.9	10.9	6.7	5.9	13.9
Travel Agency/Tour Operator	14.8	4.0	0.5	20.6	26.5	28.2	20.8	34.8	24.8
Magazine/Newspaper	9.9	12.3	1.5	4.9	11.0	5.5	12.4	11.0	9.6
Television	8.2	4.0	25.7	4.6	10.4	8.2	6.5	2.1	7.6
NTB	5.6	5.7	1.6	6.6	8.3	2.1	5.4	3.4	5.6
Trade Fair/Exhibition	0.9	0.6	1.4	1.7	1.6	0.0	1.9	2.6	0.1
General Knowledge	0.2	0.3	0.0	0.6	0.2	1.3	0.0	0.0	0.2

Sources of Information	All (%)	Africa (%)	Europe (%)	Americas (%)	Asia/ME (%)
Internet	60.5	46.2	74.1	76.7	82.2
Guide Books	41.8	20.0	66.1	50.0	52.4
Friends/Relatives	36.1	36.7	36.7	31.0	26.6
Previous Visit	32.7	50.3	16.4	9.4	6.4
Travel Agency/Tour Operator	14.8	3.4	25.4	30.0	32.4
Magazine/Newspaper	9.9	10.6	9.2	9.3	7.1
Television	8.2	8.8	8.5	1.4	4.9
NTB	5.6	5.0	6.3	3.6	7.1
Trade Fair/Exhibition	0.9	0.8	1.0	1.7	0.0
General Knowledge	0.2	0.2	0.3	0.0	0.0

A.3.4 Booking Process

Booking Process	All (%)	RSA (%)	Angola (%)	UK (%)	Germany (%)	France (%)	Italy (%)	USA (%)	Other (%)
Self	66.0	90.0	79.8	44.7	40.9	31.4	26.9	47.8	53.5
Travel Agent/Tour Operator - Elsewhere	16.6	2.6	1.6	28.4	36.5	30.4	28.9	29.2	25.4
Travel Agent/Tour Operator - Namibia	5.4	2.1	0.1	11.1	6.7	12.9	11.1	10.3	8.7
Friends/Family in Namibia	3.1	3.9	4.5	2.3	2.5	0.7	1.7	0.5	2.6
Airline	0.2	0.0	0.0	0.8	0.3	0.0	1.5	0.5	0.3
Office/Other Organisation	0.2	0.1	0.0	0.0	0.2	0.0	0.0	1.0	0.3
Friends/Family Elsewhere	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4

Booking Process	All (%)	Africa (%)	Europe (%)	Americas (%)	Asia/ME (%)
Self	66.0	87.5	43.6	51.8	43.3
Travel Agent/Tour Operator - Elsewhere	16.6	2.3	31.7	26.9	28.1
Travel Agent/Tour Operator - Namibia	5.4	2.2	8.3	7.9	13.8
Friends/Family in Namibia	3.1	3.8	1.8	2.8	7.9
Airline	0.2	0.0	0.5	0.3	0.0
Office/Other Organisation	0.2	0.1	0.1	1.9	0.0
Friends/Family Elsewhere	0.1	0.0	0.2	0.0	0.9

A.4 HOW DO THEY GET THERE AND AWAY?

A.4.1 Mode of Arrival

Mode of Arrival	All (%)	Holiday (%)	VFR (%)	Business (%)	Medical (%)	Other (%)
Air	32.4	46.5	23.4	25.9	20.0	9.1
Land	67.5	53.4	76.6	73.8	80.0	90.8
Sea	0.1	0.1	0.0	0.4	0.0	0.2
Total	100.0	100.0	100.0	100.0	100.0	100.0

Mode of Arrival	RSA (%)	Botswana (%)	Angola (%)	Zimbabwe (%)	UK (%)	Germany (%)	France (%)	Italy (%)	USA (%)	Other (%)
Air	28.3	4.7	10.9	11.2	73.3	92.0	90.5	90.2	67.9	55.3
Land	71.5	95.3	89.1	88.8	26.1	8.0	8.9	9.8	31.7	44.4
Sea	0.1	0.0	0.0	0.0	0.6	0.0	0.6	0.0	0.4	0.3
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Mode of Arrival	Africa (%)	Europe (%)	Americas (%)	Asia/ME (%)
Air	17.2	84.4	69.0	70.5
Land	82.8	15.3	30.7	29.5
Sea	0.1	0.3	0.3	0.0
Total	100.0	100.0	100.0	100.0

A.4.2 Inbound Airline

Airline	All (%)	Holiday (%)	VFR (%)	Business (%)	Medical (%)
Air Namibia	51.0	56.8	50.3	39.7	53.4
SAA/SA Express	32.8	31.0	29.4	51.6	0.0
TAAG	9.2	3.2	12.2	4.3	46.6
BA/Comair	5.9	7.6	7.4	3.4	0.0
Air Berlin	0.5	0.9	0.4	0.0	0.0
Kenya Airways	0.0	0.1	0.0	0.0	0.0
KLM	0.0	0.1	0.0	0.0	0.0
Lufthansa	0.0	0.1	0.0	0.0	0.0
Private	0.1	0.2	0.1	0.1	0.0
Can't Remember	0.3	0.2	0.1	0.8	0.0
Total	100.0	100.0	100.0	100.0	100.0

Airline	RSA (%)	Angola (%)	UK (%)	Germany (%)	France (%)	Italy (%)	USA (%)	Other (%)
Air Namibia	39.3	51.7	38.4	77.3	49.0	47.0	37.4	47.0
SAA/SA Express	50.9	0.3	45.6	19.4	37.2	34.8	53.2	44.6
TAAG	0.1	48.0	0.0	0.0	0.0	0.0	0.0	0.3
BA/Comair	9.1	0.0	16.0	1.8	12.4	14.8	5.8	6.6
Air Berlin	0.1	0.0	0.0	1.4	0.0	0.9	0.7	1.0
Kenya Airways	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.0
KLM	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.0
Lufthansa	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2
Private	0.1	0.0	0.0	0.0	0.0	0.0	2.2	0.2
Can't Remember	0.5	0.0	0.0	0.2	1.4	0.9	0.7	0.2
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Airline	Africa (%)	Europe (%)	Americas (%)	Asia/ME (%)
Air Namibia	46.0	61.6	35.8	28.7
SAA/SA Express	31.1	29.7	55.1	65.7
TAAG	17.3	0.1	0.0	0.0
BA/Comair	5.1	7.0	5.9	4.6
Air Berlin	0.1	1.1	0.5	0.0
Kenya Airways	0.0	0.1	0.0	0.0
KLM	0.0	0.1	0.0	0.0
Lufthansa	0.0	0.1	0.0	0.0
Private	0.1	0.0	2.1	0.0
Can't Remember	0.3	0.3	0.5	0.9
Total	100.0	100.0	100.0	100.0

A.4.3 Outbound Airline

Airline	All (%)	Holiday (%)	VFR (%)	Business (%)	Medical (%)
SAA/SA Express	53.1	45.0	64.0	66.2	25.5
Air Namibia	36.0	46.6	25.6	28.8	32.4
TAAG	6.6	1.5	7.2	2.1	42.2
BA/Comair	4.0	6.3	2.9	2.6	0.0
Air Berlin	0.3	0.4	0.2	0.2	0.0
Private	0.0	0.1	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0	100.0

Airline	RSA (%)	Angola (%)	UK (%)	Germany (%)	France (%)	Italy (%)	USA (%)	Other (%)
SAA/SA Express	69.8	38.8	53.3	38.4	45.4	29.8	63.4	56.2
Air Namibia	25.8	28.4	30.0	59.4	40.0	50.0	32.8	38.6
TAAG	0.1	32.8	0.8	0.2	0.0	0.0	0.0	0.2
BA/Comair	4.1	0.0	15.8	0.8	14.6	20.2	3.7	4.6
Air Berlin	0.1	0.0	0.0	1.2	0.0	0.0	0.0	0.4
Private	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Airline	Africa (%)	Europe (%)	Americas (%)	Asia/ME (%)
SAA/SA Express	58.0	42.1	65.0	72.8
Air Namibia	27.9	50.3	30.0	25.2
TAAG	11.6	0.2	0.0	0.0
BA/Comair	2.4	6.6	5.0	1.9
Air Berlin	0.1	0.7	0.0	0.0
Private	0.1	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0

A.4.4 Destination of First Flight from Namibia

Flight Destination	All (%)	Holiday (%)	VFR (%)	Business (%)	Medical (%)
Angola	**19.6**	**6.3**	**25.4**	**8.6**	**99.7**
Luanda	16.1	5.3	22.1	6.9	78.4
Lubango	3.5	1.0	3.3	1.8	20.9
Ondjiva	0.0	0.0	0.0	0.0	0.3
Botswana	**1.4**	**2.0**	**1.6**	**0.8**	**0.0**
Gaborone	0.3	0.0	0.7	0.5	0.0
Maun	1.1	2.0	0.8	0.4	0.0
Germany	**18.5**	**34.4**	**9.5**	**6.3**	**0.0**
Berlin	0.3	0.4	0.1	0.2	0.0
Frankfurt	18.3	34.0	9.3	6.0	0.0
Ghana	**0.2**	**0.2**	**0.1**	**0.2**	**0.0**
Accra	0.2	0.2	0.1	0.2	0.0
Namibia	**0.7**	**0.5**	**0.6**	**1.5**	**0.0**
Walvis Bay	0.1	0.1	0.2	0.0	0.0
Windhoek	0.6	0.4	0.4	1.5	0.0
South Africa	**56.8**	**53.8**	**60.6**	**79.1**	**0.3**
Cape Town	13.5	9.5	18.2	20.9	0.0
Johannesburg	43.3	44.3	42.4	58.3	0.3
Zambia	**1.5**	**1.1**	**1.5**	**2.5**	**0.0**
Lusaka	1.5	1.1	1.5	2.5	0.0
Zimbabwe	**1.2**	**1.8**	**0.8**	**0.8**	**0.0**
Harare	0.5	0.4	0.8	0.6	0.0
Victoria Falls	0.7	1.4	0.0	0.2	0.0
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Flight Destination	All (%)	RSA (%)	Angola (%)	UK (%)	Germany (%)	France (%)	Italy (%)	USA (%)	Other (%)
Angola	**19.6**	**0.1**	**97.7**	**1.7**	**0.0**	**0.0**	**0.0**	**2.2**	**0.9**
Luanda	16.1	0.0	80.3	1.7	0.0	0.0	0.0	1.5	0.7
Lubango	3.5	0.1	17.2	0.0	0.0	0.0	0.0	0.7	0.2
Ondjiva	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0
Botswana	**1.4**	**0.1**	**0.1**	**0.8**	**0.8**	**0.8**	**1.9**	**3.0**	**3.4**
Gaborone	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2
Maun	1.1	0.1	0.1	0.8	0.8	0.8	1.9	3.0	3.2
Germany	**18.5**	**0.0**	**0.0**	**13.3**	**67.7**	**33.8**	**35.6**	**13.4**	**23.7**
Berlin	0.3	0.0	0.0	0.0	1.2	0.0	0.0	0.0	0.4
Frankfurt	18.3	0.0	0.0	13.3	66.5	33.8	35.6	13.4	23.3
Ghana	**0.2**	**0.1**	**0.0**	**0.0**	**0.2**	**0.0**	**0.0**	**0.0**	**0.9**
Accra	0.2	0.1	0.0	0.0	0.2	0.0	0.0	0.0	0.9
Namibia	**0.7**	**0.9**	**0.0**	**0.8**	**0.7**	**0.0**	**0.0**	**0.7**	**1.6**
Walvis Bay	0.1	0.1	0.0	0.0	0.3	0.0	0.0	0.0	0.2
Windhoek	0.6	0.8	0.0	0.8	0.3	0.0	0.0	0.7	1.4
South Africa	**56.8**	**98.7**	**2.0**	**81.7**	**28.8**	**63.8**	**60.6**	**77.6**	**60.9**
Cape Town	13.5	32.6	0.1	15.0	4.6	3.1	1.9	17.9	5.7
Johannesburg	43.3	66.1	1.9	66.7	24.2	60.8	58.7	59.7	55.2
Zambia	**1.5**	**0.2**	**0.1**	**0.8**	**0.2**	**0.0**	**0.0**	**0.7**	**7.8**
Lusaka	1.5	0.2	0.1	0.8	0.2	0.0	0.0	0.7	7.8
Zimbabwe	**1.2**	**0.0**	**0.0**	**0.8**	**1.7**	**1.5**	**1.9**	**2.2**	**0.9**
Harare	0.5	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.2
Victoria Falls	0.7	0.0	0.0	0.8	1.4	1.5	1.9	2.2	0.7
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Flight Destination	All (%)	Africa (%)	Europe (%)	Americas (%)	Asia/ME (%)
Angola	**19.6**	**34.7**	**0.4**	**2.2**	**0.0**
Luanda	16.1	28.5	0.3	1.7	0.0
Lubango	3.5	6.2	0.1	0.6	0.0
Ondjiva	0.0	0.1	0.0	0.0	0.0
Botswana	**1.4**	**0.9**	**1.3**	**3.9**	**8.7**
Gaborone	0.3	0.5	0.0	0.0	1.0
Maun	1.1	0.5	1.3	3.9	7.8
Germany	**18.5**	**0.1**	**48.7**	**13.9**	**6.8**
Berlin	0.3	0.0	0.7	0.0	0.0
Frankfurt	18.3	0.1	48.0	13.9	6.8
Ghana	**0.2**	**0.3**	**0.1**	**0.6**	**0.0**
Accra	0.2	0.3	0.1	0.6	0.0
Namibia	**0.7**	**0.7**	**0.7**	**1.1**	**1.0**
Walvis Bay	0.1	0.1	0.2	0.0	0.0
Windhoek	0.6	0.7	0.5	1.1	1.0
South Africa	**56.8**	**60.1**	**47.1**	**76.1**	**80.6**
Cape Town	13.5	18.7	5.2	14.4	12.6
Johannesburg	43.3	41.3	41.9	61.7	68.0
Zambia	**1.5**	**2.3**	**0.2**	**0.6**	**1.9**
Lusaka	1.5	2.3	0.2	0.6	1.9
Zimbabwe	**1.2**	**1.0**	**1.5**	**1.7**	**1.0**
Harare	0.5	0.8	0.2	0.0	0.0
Victoria Falls	0.7	0.2	1.3	1.7	1.0
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

A.4.5 Final Destination of Air Visitors

Country	%
Germany	16.4
United States of America	9.9
France	8.6
United Kingdom	8.2
Angola	7.7
Italy	7.1
South Africa	7.0
Switzerland	3.7
Australia	3.5
Netherlands	3.2
Other	24.7

City	%
Frankfurt	8.7
Paris	6.2
London	6.2
Luanda	4.7
Munich	4.2
Milan	4.1
Durban	2.7
Zurich	2.4
Amsterdam	2.2
Brussels	2.1
Other	56.7

A.5 HOW LONG DO THEY STAY?

A.5.1 Total Length of Trip Away from Home

Length of Trip	All (nights)	RSA (nights)	Botswana (nights)	Angola (nights)	Zimbabwe (nights)	UK (nights)	Germany (nights)	France (nights)	Italy (nights)	USA (nights)	Other (nights)
Holiday	17.5	11.2	5.6	8.1	25.8	23.4	20.8	21.8	16.3	25.3	27.2
VFR	8.8	9.5	4.8	6.4	11.2	11.4	21.3	17.0	7.0	35.7	10.7
Business	7.8	5.8	3.7	4.4	5.5	18.7	64.9	17.4	24.5	19.9	21.0
Medical	8.1	2.0	4.2	8.1	-	-	-	-	-	-	-
Other	4.5	15.3	5.8	3.5	3.8	-	3.6	4.0	-	-	3.8
All	11.7	9.7	4.5	6.0	8.1	21.4	23.5	21.1	16.5	25.6	22.2

Length of Trip	All (nights)	Africa (nights)	Europe (nights)	Americas (nights)	Asia/ME (nights)
Holiday	17.5	11.2	23.1	26.8	30.7
VFR	8.8	7.8	20.4	33.2	25.4
Business	7.8	5.1	34.6	25.1	35.2
Medical	8.1	8.1	-	-	-
Other	4.5	4.5	4.6	-	-
All	11.7	7.7	23.8	27.3	31.6

A.5.2 Length of Stay in Namibia

Length of Trip	All (nights)	RSA (nights)	Botswana (nights)	Angola (nights)	Zimbabwe (nights)	UK (nights)	Germany (nights)	France (nights)	Italy (nights)	USA (nights)	Other (nights)
Holiday	11.6	9.8	4.9	7.8	16.7	13.3	14.8	14.2	12.0	11.1	13.5
VFR	8.4	9.4	4.8	6.4	10.8	10.0	19.0	12.9	5.0	16.8	9.3
Business	7.0	5.3	3.5	4.4	5.1	15.8	61.2	14.4	22.8	12.6	16.3
Medical	8.1	2.0	4.2	8.1	-	-	-	-	-	-	-
Other	3.8	11.7	3.6	3.4	2.9	-	1.6	2.0	-	-	9.6
All	9.1	8.9	4.2	5.9	7.0	13.6	18.1	14.1	12.4	11.8	12.9

Length of Trip	All (nights)	Africa (nights)	Europe (nights)	Americas (nights)	Asia/ME (nights)
Holiday	11.6	9.4	14.3	10.8	12.6
VFR	8.4	7.7	17.0	20.9	21.4
Business	7.0	4.8	30.0	12.2	29.4
Medical	8.1	8.1	-	-	-
Other	3.8	3.9	1.7	-	-
All	9.1	7.1	15.9	12.0	18.1

Length of Stay	All (nights)	First Visit (nights)	Been Before (nights)
All	9.1	16.1	8.6

A.5.3 Length of Stay in Other Countries Visited on Same Trip (LEISURE ONLY)

68.5% of all tourists did not spend a night in any other country. The reminder (31.4%) spent at least one night in another country. The analysis of length of stay in the 4 main countries visited is shown below.

Length of Stay	All (nights)	RSA (nights)	Botswana (nights)	Angola (nights)	Zimbabwe (nights)	UK (nights)	Germany (nights)	France (nights)	Italy (nights)	USA (nights)	Other (nights)
South Africa	8.9	2.9	2.4	-	7.6	6.7	6.4	8.5	2.4	7.1	14.3
Botswana	5.9	3.8	0.9	-	2.2	5.6	5.2	3.7	3.2	8.4	8.4
Zambia	7.1	2.6	-	-	4.0	4.2	3.6	5.7	3.4	7.3	10.7
Zimbabwe	3.2	3.1	-	-	8.1	6.2	1.9	0.8	1.2	2.3	4.4
All	6.6	3.4	1.9	-	4.6	5.9	4.8	5.5	2.5	6.7	**10.1**

Length of Stay	All (nights)	Africa (nights)	Europe (nights)	Americas (nights)	Asia/ME (nights)
South Africa	8.9	4.6	7.8	10.5	8.5
Botswana	5.9	3.7	6.7	6.5	7.6
Zambia	7.1	7.7	4.4	7.8	6.5
Zimbabwe	3.2	3.3	2.2	3.2	3.2
All	6.6	4.2	6.3	7.3	7.1

A.6 WHERE DO THEY VISIT?

Places Visited	All (%)	Holiday (%)	VFR (%)	Business (%)	Medical (%)	Other (%)
Windhoek	55.6	69.6	48.3	40.2	72.7	35.2
Swakopmund	30.3	58.2	19.1	11.4	0.3	1.5
Walvis Bay	25.2	43.1	12.3	20.0	0.4	2.3
Oshakati and Area	23.0	8.5	19.9	41.7	32.6	44.3
Etosha National Park	22.1	52.9	4.0	2.3	0.9	2.7
Sossusvlei/Sesriem	18.1	44.8	2.2	1.2	0.0	1.0
Fish River Canyon	11.4	28.4	0.9	0.6	0.0	1.0
Damaraland	10.2	25.4	1.1	0.5	0.0	0.0
Southern Region	10.0	16.3	11.9	2.7	0.0	3.5
Namib Naukluft	9.8	24.0	1.5	0.7	0.0	0.5
Kavango Region	7.4	12.2	4.7	4.2	0.0	13.1
Luderitz	7.2	16.6	2.2	1.0	0.0	0.5
Spitzkoppe	6.7	16.5	1.0	0.5	0.0	0.0
Caprivi National Park	6.6	15.8	0.9	0.6	0.0	6.4
Waterberg Park	5.9	14.6	0.7	0.5	0.0	0.0
Caprivi Region	5.1	2.1	12.1	3.6	0.0	14.1
Skeleton Coast Park	4.9	11.9	0.6	0.4	0.0	0.5
Brandberg	4.8	12.2	0.3	0.2	0.0	0.0
Kaokoland	3.5	8.5	0.5	0.6	0.0	0.5
Northern Region	3.2	3.1	3.4	3.8	0.0	4.3
Western Region	2.7	4.5	2.8	1.0	0.0	0.0
Sandwich Harbour	2.4	5.9	0.6	0.2	0.1	0.0
Eastern Region	1.8	1.7	2.4	1.9	0.6	1.0
Duwiseb Castle	1.3	3.2	0.2	0.0	0.0	0.0
Khaudum Game Park	1.3	2.8	0.4	0.2	0.0	2.2
Hardap Game Reserve	1.3	2.7	0.7	0.1	0.0	0.0
Central Region	1.0	1.4	1.3	0.5	0.0	0.0
Kalahari	0.6	1.4	0.1	0.0	0.0	0.0
Kunene Region	0.1	0.2	0.1	0.0	0.0	0.0

Places Visited	RSA (%)	Botswana (%)	Angola (%)	Zimbabwe (%)	UK (%)	Germany (%)	France (%)	Italy (%)	USA (%)	Other (%)
Windhoek	50.5	47.2	45.9	45.6	71.3	89.3	87.1	84.5	80.1	66.4
Swakopmund	37.4	17.5	5.2	13.1	59.0	71.6	78.1	69.7	49.3	51.3
Walvis Bay	27.9	23.9	3.5	58.4	43.0	50.6	64.4	61.9	35.3	40.7
Oshakati and Area	2.5	2.1	58.7	4.0	5.6	3.1	2.3	0.0	4.8	3.9
Etosha National Park	13.6	1.6	6.7	0.9	49.6	70.8	80.2	74.3	52.0	45.7
Sossusvlei/Sesriem	14.1	1.7	0.1	2.0	44.0	59.7	69.8	83.9	47.2	40.5
Fish River Canyon	14.2	0.4	0.8	1.3	21.0	28.6	29.2	33.6	28.1	21.8
Damaraland	4.9	0.0	0.0	0.5	30.3	40.7	55.4	62.0	24.4	22.2
Southern Region	27.6	11.5	0.0	2.0	5.5	6.4	9.7	2.7	10.1	5.7
Namib Naukluft	7.2	0.3	0.2	0.5	24.2	37.6	42.0	40.6	26.0	19.8
Kavango Region	3.5	2.9	5.4	7.3	5.4	17.0	11.2	10.4	5.0	15.4
Luderitz	11.1	1.2	0.3	1.2	10.1	19.0	12.8	24.2	15.9	10.6
Spitzkoppe	4.8	0.4	0.2	0.5	11.6	26.1	19.5	18.7	16.5	15.8
Caprivi National Park	5.1	0.0	1.4	1.7	10.2	21.4	13.5	15.6	14.2	14.8
Waterberg Park	2.2	0.0	0.2	0.5	15.1	28.9	31.2	19.3	10.5	13.1
Caprivi Region	1.3	30.1	0.0	19.0	2.0	1.8	1.4	0.9	2.3	18.3
Skeleton Coast Park	3.2	0.4	0.3	0.5	20.7	11.2	21.3	37.3	10.3	11.5
Brandberg	3.6	0.4	0.0	0.7	17.9	19.0	26.3	12.6	2.9	9.8
Kaokoland	3.1	0.0	0.0	0.8	4.4	8.7	22.8	28.4	8.0	7.9
Northern Region	3.5	2.4	2.2	0.7	4.3	5.5	4.5	4.9	6.0	3.8
Western Region	6.5	1.1	0.0	0.0	4.1	3.3	7.5	3.5	4.1	2.0
Sandwich Harbour	2.0	1.2	0.0	0.5	3.9	6.0	16.6	23.7	6.2	4.7
Eastern Region	2.6	10.9	0.2	3.0	1.8	2.7	0.6	2.7	1.2	1.6
Duwiseb Castle	1.5	0.0	0.0	0.8	1.2	5.1	3.2	4.6	0.4	2.1
Khaudum Game Park	0.5	0.0	0.9	0.0	2.1	3.0	2.4	2.8	0.8	3.2
Hardap Game Reserve	1.9	0.0	0.3	0.5	1.2	3.4	5.2	0.7	1.2	1.4
Central Region	1.8	0.4	0.0	0.0	1.9	3.0	1.8	0.0	0.4	1.1
Kalahari	0.1	0.0	0.0	0.0	0.7	3.2	5.2	7.7	0.0	0.8
Kunene Region	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	1.2	0.1

Places Visited	Africa (%)	Europe (%)	Americas (%)	Asia/ME (%)
Windhoek	47.2	84.3	78.6	73.7
Swakopmund	18.7	70.9	53.5	59.4
Walvis Bay	17.1	54.5	36.9	38.1
Oshakati and Area	29.1	3.1	3.7	3.4
Etosha National Park	8.7	69.7	46.5	49.6
Sossusvlei/Sesriem	5.6	61.6	45.4	44.1
Fish River Canyon	5.9	30.0	25.2	21.7
Damaraland	1.8	41.4	19.1	16.1
Southern Region	10.9	7.1	10.2	4.9
Namib Naukluft	2.9	34.3	24.6	18.9
Kavango Region	5.2	15.7	6.8	12.3
Luderitz	4.5	17.1	13.0	9.7
Spitzkoppe	2.0	23.1	14.8	19.8
Caprivi National Park	2.8	20.6	11.9	9.8
Waterberg Park	1.0	24.9	7.9	9.1
Caprivi Region	6.1	2.1	1.5	1.3
Skeleton Coast Park	1.7	16.2	10.2	11.3
Brandberg	1.5	17.9	2.5	10.5
Kaokoland	1.3	11.9	6.2	7.4
Northern Region	2.5	5.1	5.0	7.4
Western Region	2.5	3.3	4.5	3.5
Sandwich Harbour	0.9	8.0	6.6	4.5
Eastern Region	1.7	2.3	2.3	1.5
Duwiseb Castle	0.7	3.9	0.3	0.0
Khaudum Game Park	0.7	3.7	0.5	1.3
Hardap Game Reserve	0.9	3.0	0.8	0.0
Central Region	0.7	1.9	2.2	0.6
Kalahari	0.0	2.7	0.5	0.0
Kunene Region	0.0	0.2	0.8	0.0

A.7 WHAT DO THEY DO?

A.7.1 Activities Undertaken

Activities Undertaken	All (%)	Holiday (%)	VFR (%)	Business (%)	Medical (%)	Other (%)
Shopping	53.5	44.1	61.3	53.5	77.9	54.3
Game Viewing	29.1	65.1	11.1	3.7	1.7	6.5
Nature/Landscape Touring	26.1	58.7	8.5	4.8	0.0	1.2
None	21.6	2.0	27.9	41.6	22.0	40.3
Hiking/Trekking	13.9	33.6	2.1	1.7	0.0	0.5
4x4 Trails	12.8	28.0	5.8	2.1	0.0	0.5
Bird Watching	9.8	22.4	3.1	1.4	0.0	0.0
Historical/Archaeological Sites	8.9	20.4	2.7	1.3	0.0	0.5
Cultural Tours	8.7	19.8	2.7	1.3	0.0	0.0
Adventure Sports	7.5	16.0	4.0	1.3	0.0	0.0
Fishing	6.2	10.6	6.0	2.1	0.2	2.2
Hunting	2.4	4.7	2.0	0.5	0.0	0.0
Horse/Camel Riding	2.0	3.9	1.3	0.7	0.0	0.0
Ballooning/Pleasure Flights	1.4	3.3	0.2	0.1	0.0	0.0
Visiting Family/Socialising	1.0	1.4	1.6	0.3	0.1	0.0
Boat Trips/Cruises	0.7	1.3	0.4	0.3	0.0	0.0
Photography/Filming	0.3	0.8	0.0	0.1	0.0	0.0
Golf	0.2	0.1	0.3	0.2	0.1	0.0
Looking After Animals	0.1	0.0	0.0	0.0	0.0	3.7
Dolphin/Whale Watching	0.1	0.1	0.1	0.2	0.0	0.0
Go-Karting/Quad Biking	0.1	0.1	0.1	0.0	0.0	0.0
Religion/Missionaries	0.1	0.1	0.1	0.0	0.0	0.0
City Touring	0.0	0.1	0.0	0.0	0.0	0.0

Activities Undertaken	RSA (%)	Botswana (%)	Angola (%)	Zimbabwe (%)	UK (%)	Germany (%)	France (%)	Italy (%)	USA (%)	Other (%)
Shopping	29.7	44.2	79.3	47.4	43.0	45.4	46.3	41.2	45.3	48.3
Game Viewing	27.8	2.8	6.2	9.5	59.6	81.9	80.3	78.6	69.4	54.7
Nature/Landscape Touring	28.3	7.2	0.7	12.0	57.7	73.8	81.5	87.6	63.9	49.3
None	29.1	47.5	19.2	44.9	12.2	4.8	4.0	2.1	5.9	15.0
Hiking/Trekking	14.0	0.3	0.0	2.0	35.1	40.5	44.6	39.1	49.2	29.3
4x4 Trails	17.4	3.1	0.2	3.5	24.1	31.0	48.9	47.4	22.1	21.9
Bird Watching	11.5	1.8	1.2	3.0	20.7	26.2	23.2	17.8	28.5	17.4
Historical/Archaeological Sites	9.6	1.8	1.0	2.0	18.6	28.0	32.4	29.1	15.2	14.7
Cultural Tours	5.4	2.7	1.3	1.7	20.2	30.1	24.3	32.9	27.0	18.2
Adventure Sports	12.3	4.9	0.2	0.7	18.6	10.3	19.9	10.2	15.7	13.7
Fishing	13.2	3.0	2.7	4.1	3.8	3.1	3.0	3.6	5.5	5.3
Hunting	5.5	0.4	0.2	0.7	2.6	3.6	2.4	0.0	9.7	1.8
Horse/Camel Riding	1.9	2.9	0.5	0.2	5.6	5.7	5.2	7.5	2.7	3.2
Ballooning/Pleasure Flights	0.7	0.0	0.2	0.5	6.3	3.8	8.9	4.9	6.4	2.6
Visiting Family/Socialising	1.6	1.2	1.0	0.0	1.0	0.7	0.0	0.0	0.4	0.7
Boat Trips/Cruises	0.6	0.0	0.0	0.5	2.4	2.1	6.2	0.9	0.0	1.3
Photography/Filming	0.4	0.0	0.0	0.0	2.0	0.8	0.6	2.0	3.9	0.3
Golf	0.4	0.0	0.0	0.0	1.2	0.1	0.6	0.0	0.4	0.2
Looking After Animals	0.1	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5
Dolphin/Whale Watching	0.1	0.0	0.0	0.0	0.6	0.1	1.2	0.7	0.0	0.2
Go-Karting/Quad Biking	0.1	0.0	0.0	0.0	0.6	0.6	0.0	0.0	0.0	0.0
Religion/Missionaries	0.1	0.0	0.0	0.0	0.0	0.1	0.0	0.7	0.0	0.1
City Touring	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0

Activities Undertaken	Africa (%)	Europe (%)	Americas (%)	Asia/ME (%)
Shopping	56.5	43.5	44.4	45.7
Game Viewing	14.9	77.6	67.9	56.8
Nature/Landscape Touring	12.3	73.1	63.3	54.4
None	26.1	6.0	7.4	15.7
Hiking/Trekking	5.4	40.7	49.5	39.8
4x4 Trails	7.0	33.4	21.2	25.9
Bird Watching	5.5	24.1	25.1	17.3
Historical/Archaeological Sites	4.4	24.6	14.9	22.1
Cultural Tours	3.1	27.0	26.4	22.8
Adventure Sports	5.1	14.4	17.6	22.4
Fishing	7.0	3.5	5.1	2.4
Hunting	2.2	2.9	6.9	1.8
Horse/Camel Riding	1.2	5.2	2.7	3.3
Ballooning/Pleasure Flights	0.5	4.1	6.1	2.5
Visiting Family/Socialising	1.1	0.7	0.7	0.6
Boat Trips/Cruises	0.2	2.4	0.0	0.6
Photography/Filming	0.1	0.7	2.6	2.5
Golf	0.2	0.3	0.7	0.0
Looking After Animals	0.1	0.0	0.0	0.0
Dolphin/Whale Watching	0.0	0.4	0.0	0.0
Go-Karting/Quad Biking	0.0	0.3	0.0	0.0
Religion/Missionaries	0.0	0.1	0.0	0.6
City Touring	0.0	0.1	0.0	0.0

A.7.2 Main Activity Undertaken

Main Activity	All (%)	Holiday (%)	VFR (%)	Business (%)	Medical (%)	Other (%)
None	64.9	10.0	99.8	99.8	94.9	100.0
Game Viewing	13.0	33.7	0.0	0.0	0.0	0.0
Nature/Landscape Touring	9.5	24.7	0.1	0.0	0.0	0.0
Hiking/Trekking	2.3	5.9	0.0	0.0	0.0	0.0
Shopping	1.9	4.1	0.0	0.2	4.9	0.0
Adventure Sports	1.9	4.9	0.0	0.0	0.0	0.0
4x4 Trails	1.7	4.4	0.0	0.0	0.0	0.0
Hunting	1.4	3.5	0.1	0.0	0.0	0.0
Fishing	1.3	3.4	0.0	0.0	0.2	0.0
Cultural Tours	0.5	1.4	0.0	0.0	0.0	0.0
Historical/Archaeological Sites	0.4	1.1	0.0	0.0	0.0	0.0
Bird Watching	0.4	0.9	0.0	0.0	0.0	0.0
Photography/Filming	0.2	0.5	0.0	0.0	0.0	0.0
Visiting Family/Socialising	0.2	0.5	0.0	0.0	0.0	0.0
Ballooning/Pleasure Flights	0.2	0.5	0.0	0.0	0.0	0.0
Horse/Camel Riding	0.1	0.3	0.0	0.0	0.0	0.0
Boat Trips/Cruises	0.0	0.1	0.0	0.0	0.0	0.0
Golf	0.0	0.1	0.0	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

Main Activity	RSA (%)	Botswana (%)	Angola (%)	Zimbabwe (%)	UK (%)	Germany (%)	France (%)	Italy (%)	USA (%)	Other (%)
None	55.1	92.5	92.1	93.5	34.2	20.8	15.8	6.9	23.7	43.1
Game Viewing	9.3	0.4	2.1	0.5	28.1	43.4	36.5	39.1	31.6	29.2
Nature/Landscape Touring	11.2	1.5	0.2	1.2	25.4	24.9	35.1	33.5	20.2	18.1
Hiking/Trekking	4.6	0.0	0.0	0.8	2.0	2.8	2.4	1.6	9.2	3.4
Shopping	0.6	2.0	3.9	1.9	1.2	0.4	0.0	2.3	0.0	1.0
Adventure Sports	5.5	0.7	0.0	0.0	3.7	1.1	1.0	0.0	0.4	0.8
4x4 Trails	4.1	1.1	0.0	0.5	0.6	1.5	3.9	3.7	0.0	1.6
Hunting	3.4	0.0	0.2	0.0	0.0	1.4	1.2	0.0	8.2	0.6
Fishing	3.8	1.5	0.3	1.0	1.0	0.1	0.0	0.0	0.0	0.0
Cultural Tours	0.6	0.0	0.3	0.0	0.0	1.3	1.7	3.0	0.4	0.6
Historical/Archaeological Sites	0.5	0.2	0.3	0.0	0.4	0.7	0.6	1.6	0.0	0.6
Bird Watching	0.4	0.0	0.2	0.0	2.3	0.5	0.6	0.9	3.8	0.1
Photography/Filming	0.5	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Visiting Family/Socialising	0.1	0.0	0.2	0.0	0.6	0.1	0.0	6.1	0.0	0.1
Ballooning/Pleasure Flights	0.2	0.0	0.0	0.0	0.0	0.5	0.6	0.7	2.0	0.3
Horse/Camel Riding	0.1	0.0	0.0	0.5	0.0	0.3	0.6	0.7	0.0	0.2
Boat Trips/Cruises	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Golf	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.4	0.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Main Activity	Africa (%)	Europe (%)	Americas (%)	Asia/ME (%)
None	64.9	78.2	20.2	24.6
Game Viewing	13.0	4.9	41.0	32.8
Nature/Landscape Touring	9.5	4.4	27.1	21.3
Hiking/Trekking	2.3	1.7	3.1	9.0
Shopping	1.9	2.4	0.6	0.0
Adventure Sports	1.9	2.1	1.1	0.3
4x4 Trails	1.7	1.6	2.2	0.0
Hunting	1.4	1.3	0.9	5.9
Fishing	1.3	1.7	0.1	0.0
Cultural Tours	0.5	0.4	1.0	1.3
Historical/Archaeological Sites	0.4	0.4	0.6	0.0
Bird Watching	0.4	0.2	0.6	2.9
Photography/Filming	0.2	0.3	0.0	0.5
Visiting Family/Socialising	0.2	0.1	0.5	0.0
Ballooning/Pleasure Flights	0.2	0.1	0.3	1.4
Horse/Camel Riding	0.1	0.1	0.3	0.0
Boat Trips/Cruises	0.0	0.0	0.0	0.0
Golf	0.0	0.0	0.1	0.3
Total	100.0	100.0	100.0	100.0

A.8 WHERE DO THEY STAY?

Accommodation	All (%)	Holiday (%)	VFR (%)	Business (%)	Medical (%)	Other (%)
Guesthouse/B&B	35.2	37.9	12.7	46.2	52.2	51.1
Friends/Family	31.2	9.1	83.8	15.5	30.0	20.9
Lodge/Tented Lodge	24.0	47.4	5.0	13.1	11.1	5.9
Hotel	17.4	25.2	5.0	20.7	8.4	7.4
Camp Site	16.1	39.9	1.9	1.2	0.0	1.0
Guest Farm	5.2	11.9	1.2	1.2	0.0	0.0
Self-Catering/Rented	4.0	6.3	1.5	4.1	0.5	0.8
Vehicle/Rooftop Tent	2.9	4.6	0.1	3.0	0.0	12.1
Hostel	1.8	3.5	0.5	1.2	0.0	0.9
Conservancy	0.8	1.6	0.1	0.5	0.0	0.0
Airport	0.0	0.0	0.0	0.0	0.0	0.3

Accommodation	RSA (%)	Botswana (%)	Angola (%)	Zimbabwe (%)	UK (%)	Germany (%)	France (%)	Italy (%)	USA (%)	Other (%)
Guesthouse/B&B	25.7	31.5	46.7	28.1	38.6	35.0	35.9	37.4	27.0	28.7
Friends/Family	34.4	48.6	35.9	36.3	10.6	15.1	4.8	2.0	11.5	25.5
Lodge/Tented Lodge	18.8	8.9	9.9	25.3	40.2	62.0	69.1	73.2	57.7	37.9
Hotel	17.5	11.9	9.5	7.7	28.3	29.7	29.7	41.8	32.3	28.0
Camp Site	24.3	3.3	0.3	1.1	35.2	33.9	43.9	36.5	28.7	29.2
Guest Farm	4.6	0.4	0.8	0.3	8.6	22.5	17.0	9.9	12.7	8.0
Self-Catering/Rented	7.1	1.8	1.8	5.3	4.8	3.1	3.1	5.6	7.7	3.3
Vehicle/Rooftop Tent	1.5	1.0	2.5	0.5	3.6	5.4	9.6	5.1	1.2	5.9
Hostel	1.1	2.3	0.0	0.5	7.1	4.8	3.2	2.3	10.7	4.2
Conservancy	0.3	0.0	0.6	0.0	4.0	1.4	1.2	0.0	3.3	1.5
Airport	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.1

Accommodation	Africa (%)	Europe (%)	Americas (%)	Asia/ME (%)
Guesthouse/B&B	35.5	34.8	31.7	31.6
Friends/Family	37.6	10.0	11.1	13.1
Lodge/Tented Lodge	14.0	58.8	50.8	36.9
Hotel	12.6	32.3	35.7	34.0
Camp Site	9.9	38.0	26.9	32.9
Guest Farm	2.2	16.9	9.4	2.4
Self-Catering/Rented	4.2	2.9	5.6	5.6
Vehicle/Rooftop Tent	2.0	6.7	1.9	3.7
Hostel	0.6	5.3	9.8	5.0
Conservancy	0.4	1.9	2.6	2.7
Airport	0.0	0.1	0.0	0.0

A.9 HOW DO THEY TRAVEL AROUND?

Local Transport	All (%)	Holiday (%)	VFR (%)	Business (%)	Medical (%)	Other (%)
Private Car/4x4	46.8	44.7	55.1	47.5	25.4	47.4
Public Transport	29.9	4.4	41.6	41.6	76.9	49.7
Hire Car/4x4	20.2	38.5	4.6	14.8	0.2	6.4
Coach/Minibus Tour	2.6	6.4	0.1	0.5	0.0	0.4
Overland Truck	1.5	3.8	0.0	0.2	0.0	0.0
Guided 4x4	1.3	3.3	0.1	0.2	0.0	0.0
Motorbike/Bicycle	0.8	1.9	0.1	0.0	0.0	0.0
Air	0.8	1.5	0.2	0.4	0.0	0.3
Railway	0.1	0.2	0.0	0.1	0.0	0.0
Truck	0.1	0.0	0.0	0.4	0.0	0.0
Did Not Travel	0.1	0.0	0.0	0.1	0.0	0.6
Desert Express Train	0.0	0.1	0.0	0.0	0.0	0.0

Local Transport	RSA (%)	Botswana (%)	Angola (%)	Zimbabwe (%)	UK (%)	Germany (%)	France (%)	Italy (%)	USA (%)	Other (%)
Private Car/4x4	80.5	77.4	37.3	58.4	27.2	17.3	16.2	11.3	25.4	20.3
Public Transport	2.1	25.6	62.3	55.9	9.6	2.5	1.8	0.7	2.1	23.0
Hire Car/4x4	15.0	3.3	3.0	3.8	45.9	60.8	73.5	73.0	43.4	44.7
Coach/Minibus Tour	0.6	0.0	0.5	0.0	10.4	14.7	5.0	7.0	9.2	4.6
Overland Truck	0.2	0.0	0.0	0.5	7.3	2.4	0.6	0.0	10.3	6.4
Guided 4x4	0.3	0.0	0.0	0.0	4.0	5.6	5.3	10.5	11.7	2.5
Motorbike/Bicycle	1.6	0.0	0.0	0.0	2.9	0.4	0.0	0.9	1.9	1.4
Air	0.2	0.2	0.0	0.9	0.9	1.2	3.0	1.4	6.5	2.4
Railway	0.0	0.0	0.2	0.0	0.0	0.3	0.0	0.0	0.0	0.3
Truck	0.2	0.4	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0
Did Not Travel	0.1	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.2
Desert Express Train	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Local Transport	Africa (%)	Europe (%)	Americas (%)	Asia/ME (%)
Private Car/4x4	55.6	17.5	24.8	20.4
Public Transport	38.1	3.0	3.2	4.8
Hire Car/4x4	8.0	62.5	43.9	51.9
Coach/Minibus Tour	0.5	9.9	9.3	6.4
Overland Truck	0.1	4.7	9.8	15.0
Guided 4x4	0.1	4.7	10.0	5.5
Motorbike/Bicycle	0.7	0.6	4.8	1.3
Air	0.3	1.7	5.7	1.8
Railway	0.1	0.2	0.0	0.6
Truck	0.1	0.0	0.0	0.0
Did Not Travel	0.1	0.1	0.0	0.0
Desert Express Train	0.1	0.0	0.0	0.0

A.10 HOW MUCH DO THEY SPEND?

Average Expenditure per Person Per Night	Total (N$)	Holiday (N$)	VFR (N$)	Business (N$)	Medical (N$)	Other (N$)
Accommodation	327	478	84	361	237	291
Food and Drink	187	197	147	218	153	188
Local Transport	257	349	148	248	157	287
Entertainment/Recreation	70	77	64	77	27	46
Shopping	891	134	382	2,461	433	1,649
Other	109	32	41	120	783	28
Spend in Namibia	**1,840**	**1,267**	**865**	**3,486**	**1,790**	**2,487**

Average Expenditure per Person *(those who took a flight to/from Namibia)*	Total (N$)	Holiday (N$)	VFR (N$)	Business (N$)	Medical (N$)	Other (N$)
International Airfares	*9,556*	*11,259*	*6,386*	*8,426*	-	-
Average Spend Per Flight – Air Namibia	*9,898*					
- Other Airlines	*8,776*					

Average Expenditure per Person Per Night	All (N$)	RSA (N$)	Botswana (N$)	Angola (N$)	Zimbabwe (N$)	UK (N$)	Germany (N$)	France (N$)	Italy (N$)	USA (N$)	Other (N$)
Accommodation	327	295	199	223	207	470	589	555	663	747	461
Food and Drink	187	174	168	186	161	230	228	213	224	305	182
Local Transport	257	229	238	182	354	484	377	455	489	376	329
Entertainment	70	58	77	77	74	65	62	60	56	143	70
Shopping	891	61	148	2,253	222	74	75	47	96	65	288
Other	109	29	176	192	275	73	36	19	9	151	47
Spend in Namibia	**1,840**	**846**	**1,006**	**3,114**	**1,294**	**1,396**	**1,367**	**1,349**	**1,537**	**1,787**	**1,377**

Average Expenditure per Person Per Night	All (N$)	Africa (N$)	Europe (N$)	Americas (N$)	Asia/ME (N$)
Accommodation	327	248	559	774	599
Food and Drink	187	175	211	296	295
Local Transport	257	211	415	394	336
Entertainment/Recreation	70	70	60	132	88
Shopping	891	1,141	71	102	88
Other	109	127	32	108	124
Spend in Namibia	**1,840**	**1,972**	**1,348**	**1,806**	**1,530**

A.11 WHAT DO THEY THINK OF NAMIBIA?

A.11.1 Cost of Travel in Namibia

Response	All (%)	Holiday (%)	VFR (%)	Business (%)	Medical (%)	Other (%)
More Expensive Than I Expected	13.6	17.4	12.0	11.7	6.3	10.6
About The Same As I Expected	65.3	57.9	67.1	69.8	79.5	73.3
Less Expensive Than I Expected	20.1	23.9	20.5	16.6	14.2	12.5
No Travel Cost Incurred	0.5	0.2	0.2	1.0	0.0	3.4
Don't Know	0.4	0.4	0.1	0.9	0.0	0.2
Refuse To Answer	0.1	0.2	0.0	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

Response	RSA (%)	Botswana (%)	Angola (%)	Zimbabwe (%)	UK (%)	Germany (%)	France (%)	Italy (%)	USA (%)	Other (%)
More Expensive Than I Expected	11.1	23.6	8.7	18.8	14.2	17.7	27.1	25.3	10.7	22.2
About The Same As I Expected	64.9	70.1	75.8	64.7	55.9	54.8	50.9	49.3	57.2	49.5
Less Expensive Than I Expected	22.7	5.8	15.4	16.1	28.1	25.4	20.9	22.3	29.1	26.3
No Travel Cost Incurred	0.7	0.2	0.0	0.4	1.2	0.8	0.6	0.0	0.4	1.1
Don't Know	0.6	0.3	0.0	0.0	0.6	1.0	0.6	2.3	0.4	0.9
Refuse To Answer	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.7	2.3	0.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Response	Africa (%)	Europe (%)	Americas (%)	Asia/ME (%)
More Expensive Than I Expected	12.0	20.1	10.6	13.2
About The Same As I Expected	69.0	52.7	56.8	53.4
Less Expensive Than I Expected	18.3	25.2	30.5	30.8
No Travel Cost Incurred	0.4	0.8	0.3	0.6
Don't Know	0.2	1.1	0.3	2.1
Refuse To Answer	0.0	0.1	1.5	0.0
Total	100.0	100.0	100.0	100.0

A.11.2 Satisfaction with Namibia Wildlife Resorts

Satisfaction with NWR	All (%)	Holiday (%)	VFR (%)	Business (%)	Medical (%)	Other (%)
Highly Satisfied	49.4	50.3	45.7	34.3	100.0	0.0
Satisfied	39.4	38.7	36.5	55.0	0.0	100.0
Unsatisfied	7.9	7.8	10.8	7.9	0.0	0.0
Highly Unsatisfied	3.3	3.2	6.9	2.8	0.0	0.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

Response	RSA (%)	Germany (%)	Other (%)
Highly Satisfied	45.5	51.3	50.4
Satisfied	42.5	35.4	40.0
Unsatisfied	10.4	8.8	6.1
Highly Unsatisfied	1.6	4.6	3.5
Total	100.0	100.0	100.0

Response	Africa (%)	Europe (%)
Highly Satisfied	53.7	46.3
Satisfied	34.6	43.1
Unsatisfied	8.1	7.9
Highly Unsatisfied	3.6	2.7
Total	100.0	100.0

A.11.3 Visit Rating

Rating	All (%)	Holiday (%)	VFR (%)	Business (%)	Medical (%)	Other (%)
Very Enjoyable	67.6	85.0	71.7	46.2	52.2	34.3
Enjoyable	25.6	13.5	24.0	41.2	31.0	43.1
Fair	6.5	1.2	4.3	12.0	16.6	22.1
Disappointing	0.3	0.2	0.0	0.6	0.2	0.5
Very Disappointing	0.0	0.1	0.0	0.1	0.0	0.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

Rating	RSA (%)	Botswana (%)	Angola (%)	Zimbabwe (%)	UK (%)	Germany (%)	France (%)	Italy (%)	USA (%)	Other (%)
Very Enjoyable	79.5	63.1	50.8	51.0	83.8	87.9	87.9	84.3	93.4	72.7
Enjoyable	17.6	32.5	36.3	36.8	10.9	10.4	10.9	13.4	6.6	24.2
Fair	2.6	3.8	12.5	11.2	5.3	1.6	0.7	1.4	0.0	3.1
Disappointing	0.2	0.6	0.4	0.5	0.0	0.1	0.6	0.9	0.0	0.0
Very Disappointing	0.1	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Rating	Africa (%)	Europe (%)	Americas (%)	Asia/ME (%)
Very Enjoyable	61.8	86.4	91.8	79.3
Enjoyable	29.8	11.7	8.2	19.5
Fair	8.0	1.7	0.0	1.2
Disappointing	0.3	0.1	0.0	0.0
Very Disappointing	0.1	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0

A.11.4 Would You Recommend Namibia?

Response	All (%)	Holiday (%)	VFR (%)	Business (%)	Medical (%)	Other (%)
Yes, Definitely	85.8	94.2	86.3	76.9	78.3	70.4
Yes, Probably	10.9	5.1	10.5	16.8	18.1	18.5
Possibly	2.8	0.5	3.0	5.4	2.8	10.5
No, Probably Not	0.4	0.1	0.1	0.8	0.8	0.6
No, Definitely Not	0.1	0.1	0.1	0.1	0.0	0.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

Response	RSA (%)	Botswana (%)	Angola (%)	Zimbabwe (%)	UK (%)	Germany (%)	France (%)	Italy (%)	USA (%)	Other (%)
Yes, Definitely	93.1	94.0	74.4	89.3	95.1	95.3	94.2	93.3	94.7	88.3
Yes, Probably	5.6	4.7	19.1	8.3	3.4	4.2	5.2	4.4	4.9	9.3
Possibly	1.1	0.8	5.7	1.2	0.6	0.3	0.0	2.3	0.4	2.4
No, Probably Not	0.1	0.6	0.7	0.7	1.0	0.3	0.0	0.0	0.0	0.0
No, Definitely Not	0.1	0.0	0.0	0.5	0.0	0.0	0.6	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Response	Africa (%)	Europe (%)	Americas (%)	Asia/ME (%)
Yes, Definitely	83.0	95.5	95.0	91.3
Yes, Probably	13.0	3.7	4.7	7.4
Possibly	3.5	0.5	0.3	1.3
No, Probably Not	0.4	0.2	0.0	0.0
No, Definitely Not	0.1	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0

B. Methodology

B.1 Package Breakdown

When analysing tourist expenditure, it is necessary to disaggregate expenditure on package tours, as these are a combination of other services such as accommodation, transport, food, etc.

The process used for this was to disaggregate each package that was reported by a tourist by applying certain percentages to extract the following:

- International airfare
- Accommodation
- Food and Drink
- Local Transport
- Tours
- Entertainment/Recreation

Tours can be considered as a "mini-package" within a package, as these often consist of transport and entertainment/recreation. Consequently there is a second level of disaggregation required, in order to end up with the following:

- International airfare
- Accommodation
- Food and Drink
- Local Transport
- Entertainment/Recreation

The spending patterns of non-package tourists that were included in the survey were studied, and these were used to enable disaggregation of package tour expenditure. Matrixes were developed to enable package tours to be disaggregated for tourists from:

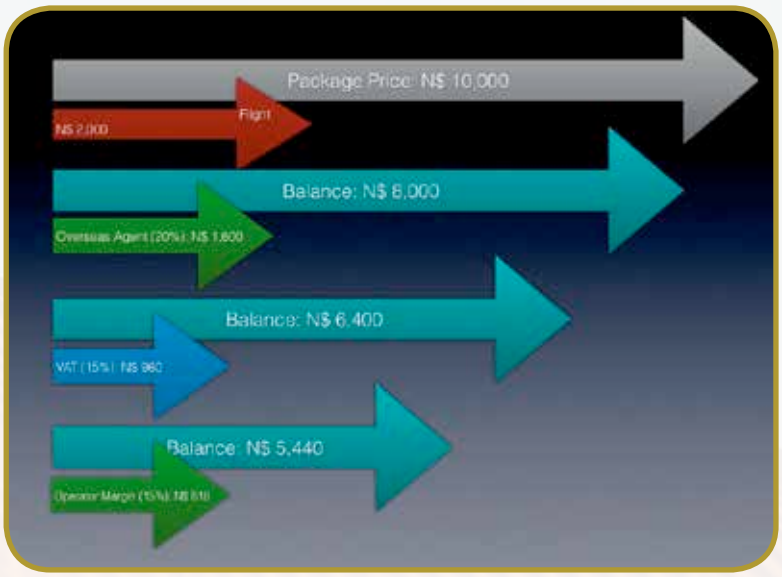
- Africa
- Europe
- Americas
- Middle East/Asia

These market distinctions were made as it was found that tourists from different parts of the world spend their money on different things. Most obviously, those travelling the furthest tended to spend a higher proportion of their total package on the airfare.

The percentages calculated from the non-package tourists were checked against estimates made by tour operators in Namibia when they were interviewed in early 2013 to ensure they were realistic.

The disaggregation process was adjusted depending on what each tourist reported as being included in the package (the matrix was developed to include all different combinations of what the tourist could report as being included). An example of the process using figures purely for demonstration purposes is shown below.

Firstly the estimate for the international transport element is made. If this is on Air Namibia then it can be included in any economic impact calculations regarding tourism in the country.



Overseas travel agents will take a commission of around 20% of the cost of the package. This also needs to be deducted.

The remaining value can be considered the amount that is distributed in Namibia.

Local tour operators are charged 15% VAT on their sales, and therefore this is a contribution to government tax. The tour operator will also charge a margin on the services and goods provided to their clients (this is their profit). This needs to be calculated at this stage.

The balance remaining can be distributed amongst the various items that make up the package (the goods and services provided). If tours are included (for example a package may include 4 nights accommodation in Windhoek, then a 3 night tour to Etosha), then the "tour" element is subsequently broken down into accommodation, transport, and food/drink.



B.2 Weighting

Weighting of the survey data is required in order to reach averages that can apply to the totals for the variables. In general this is only of considerably significance for the continuous variables (scale numbers) such as average length of stay and expenditure by the visitor.

Nearly always in sample surveys of departing visitors, there are some border posts where interviewing does not take place (for practicality and cost reasons), and also there are non-uniform sampling fractions used because sample size is driven by the 'confidence limits' for sample statistics that are acceptable to the user and by the level of interest in particular market segments.

The option selected for weighting the sample has been to weight by twelve nationalities/ nationality groupings and by means of transport as indicated by the border post in the sample survey (air/road).

The calculated weights are shown in the table below.

Weights by Nationality Groups and Transport (Border Post)		
Nationality	**Air**	**Road**
AFRICA		
South Africa	0.469	0.813
Angola	0.283	3.617
Botswana	0.390	0.889
Zimbabwe	0.548	1.343
Other Africa	0.364	4.267
EUROPE		
Germany	0.652	0.949
UK	0.716	1.004
Italy	0.493	0.623
France	0.524	0.618
Other Europe	0.902	1.694
OTHER REGIONS		
USA	0.427	1.972
Other Countries	0.711	1.573

These weights are applied to the individual cases in the sample that are in the above nationality and transport categories. These were used when compiling all the tables in Appendix A.

B.3 Analysis of the Data

When analysing a tourist survey it is necessary to identify which country of residence and purpose of visit groups can be analysed with an acceptable statistical level of confidence. As a rule of thumb, 100 completed interviews with any "group" will provide this level of confidence.

The table below shows the number of completed interviews by country of residence and purpose of visit for the top 14 countries (in terms of interviews completed).

Country of Residence	Holiday	VFR	Business	Medical	Religion	Shop	Transit	Total
South Africa	1,176	847	613	1	9		5	2651
Angola	154	362	319	401	3	16	22	1277
Germany	578	85	47				2	712
Botswana	23	108	100	5	12		3	251
Zimbabwe	19	42	150		1		3	215
USA	121	15	25					161
France	138	7	13				1	159
United Kingdom	110	15	34					159
Italy	120	1	5					126
Zambia	17	45	27		2		3	94
Netherlands	80	5	8					93
Switzerland	74	1	3					78
Spain	69	1	4					74
Australia	51	6	12					69
ALL	**2,955**	**1,578**	**1,473**	**407**	**27**	**16**	**44**	**6,500**

The figures in red show data that can be analysed at a Country of Residence AND Purpose of Visit level with an acceptable level of confidence. For example, it would be possible to analyse Holiday tourists from South Africa to reveal their age profile, likes, dislikes, etc, as the sample is sufficient in size.

The blue figures show data that can be analysed at a Country of Residence OR Purpose of Visit level with an acceptable level of confidence.

The green figures show data can be analysed at a Country of Residence level, but the findings should be treated with extreme caution. In this report, no individual analysis has been undertaken on these countries.

Consequently, when analysing the survey data, the findings are presented at the following levels:

By Country of Residence for:

- South Africa
- Angola
- Botswana
- Zimbabwe
- Germany
- UK

- France
- Italy
- USA
- Other Countries

By combining countries into regions, it has also been possible to present data by Region for:

- Africa
- Europe
- Americas
- Middle East/Asia

Finally, data can be presented by Purpose of Visit as follows:

- Leisure
- VFR
- Business
- Medical
- Other

Note that Religion, Shopping and Transit have been combined to make "Other" – and even then the sample size is only 87. Data for "Other" should therefore be treated with caution.

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