AN EVALUATION OF THE CONTRIBUTION OF ECOTOURISM TO THE ECONOMY OF THE REPUBLIC OF BOTSWANA IN 1984

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SYNOPSIS

In 1984, Botswana was an independent country at an early stage of development. It had a limited capital infrastructure, poor agricultural resources, a growing population and low formal sector employment. The country had been politically stable and had made a noteworthy transition from the poor economic position at independence in 1966 to the economic strength prevailing in the country at that time. The positive economic outlook was however, due mainly to a single product, diamonds.

Background to the study

The Government of the Republic of Botswana had identified the development of a tourist industry as a means of stimulating and diversifying economic growth. In the absence of other attractions, tourism based upon wildlife - ecotourism - was seen as the area most amenable to such development.

Government statistical and financial data does not identify tourism as a discrete activity. Analysis based upon this data suggests that the contribution of tourism to the economy of the country was negligible.

It was believed this analysis is erroneous. The hypothesis underlying this study is that tourism was already making a significant contribution to the economy of Botswana in 1984 but that this contribution was not reflected because of the statistical and accounting data collection systems in use in that country.

The research showed that the Central Statistics Office of the Government of Botswana produced regular statistical bulletins on tourism in Botswana.

It was found that this data suffers from several limitations when attempting to establish the contribution of tourism to the economy of the country as:

* it is based upon the full, very broad United Nations definition of tourism, which takes into account expenditure of all departing visitors from the country;
* the various components of the tourist industry are categorised under different headings by the particular industry in which they fall and no composite collation of tourist industry data was made;
* no system existed for measuring the income flowing to informal sector participants; and,
* no system existed for measuring the total foreign exchange earnings generated by tourist activity if payments were made outside the host country and imported by third parties.

There is, therefore, a twofold obstacle in attempting to evaluate the contribution of ecotourism to the economy of Botswana in 1984:

1. the system of national accounting did not identify those sectors that were tourist industry specific; and
2. the inaccuracy of the statistical data that are available.

This study developed a methodology whereby the contribution of ecotourism can be evaluated. The results are important in that they give basic data upon which government can assess plans and against which the impact of future actions can be measured.

The scope of the study

The study was restricted to an evaluation of the contribution of the ecotourist industry to the economy of Botswana in 1984. The bulk of the study was undertaken in 1984 and data from that year form the core of the project.

Findings of the study

Tour operators

Two basic types of tour operators - fixed and mobile - operated in Botswana at that time. It was their activities that provided the basic infrastructure for ecotourists. Hotels and Motels in Botswana derived little income from ecotourists and were not dependent upon them for the survival of their businesses.

The 67 tour operators identified earned some P11,2 million in Botswana. They had invested P21 million in infrastructure and employed 870 people of whom 774 were Batswana. Hotels and Motels attributed P698 000 of their income to tourists and employed 60 people to service this trade.

Expenditure by tour operators within Botswana was approximately P8,5 million with fixed operators contributing the bulk of this. P1,2 million was spent worldwide by operators in promoting Botswana as an ecotourist destination.

Seasonality.

Ecotourist activity was seasonal peaking from June to September. This seasonality of activity was also identified in associated areas of the economy which reflect the impact of the ecotourist trade.

Independent ecotourists

Accurately assessing the total number of ecotourists who travelled independently of tour operators was not possible on the basis of existing official statistics. From data collected from other sources it was calculated that approximately 3 600 independent ecotourists visited Botswana's National Parks during 1984. These ecotourists spent some P750 000 throughout the country during their stay. The peak periods for independent ecotourists visits were in April, July and August.

31% of the expenditure of independent ecotourists' was on fuel, 15% on food, 9% on vehicle hire, boat hire, aircraft flights or hardware goods, 9% on organized trips, 7% on private accommodation (Hotels, Lodges etc) 7% on camping fees, 6% on liquor and 6% on National Park entry fees. The remaining 10% was spent on hiring dugouts, buying curios from shops and local people and on hiring guides. This expenditure was concentrated in the north-western districts,

Associated industries

Interviews were conducted with 73 companies identified as being associated in some way with the provision of goods or services to the ecotourist industry. Amongst these companies, tourism generated P8 318 000 in turnover and created 102 job opportunities. The employees in these jobs supported approximately 785 dependants. Whilst the majority of the benefit was derived in the main ecotourist areas of the north-western districts, the impact was felt throughout the economy.

Employment

Tour operators employed 870 people who received wages, benefits and tips amounting to P3 443 000 in 1984. Of the 870 persons employed by tour operators 774 were Batswana; a ratio of 8 Batswana to 1 expatriate. In addition to their basic wages these persons also received tips of P85 700. Hotels and associated industries employed in excess of 262 staff to directly or indirectly, provide facilities for ecotourists. A total number of 1 032 persons therefore owed their jobs to ecotourist activity through this employment.

Employees indicated an average of 7.7 dependants per person employed. Based upon this figure, 7 946 dependants were supported by the total Batswana labour force of 1 032 employees.

The employment attributable to ecotourism formed 61% of formal sector employment in the north-western districts, an area deficient in other non-government sector employment.

In the informal sector ecotourist activity stimulated a minimum flow of P341 000 to rural communities. This represented support for the equivalent of 531 households based on average earnings.

Impact on government.
In 1984 Central and Local Government authorities derived in excess of P1 million, in the form of taxes, licence fees, lease fees, National Park entry fees, use of government services (post, telephones, telex) from tour operators. In addition to these amounts Government also derived income from excise duties and tax on fuel and liquor sales; personal tax on salaries and wages and road tax on visiting vehicles. The total amount of the additional revenue derived in this way from ecotourist activities could be determined as these latter figures were not identified by sector at any stage of collection.

Ecotourist activity was particularly important to local government in the north-western districts.

Ecotourism contributed to government objectives of broadening the base of the economy and in rural job creation. However the setting aside of land for tourism based upon wildlife created a conflict between increasing demands for more land for cattle and for the growing human population. The opportunity cost arising from land-use decisions has not been addressed in this study or by those formulating Botswana's tourism policy.

Tour operators were anticipating a considerable expansion of activities which would lead to increased economic activity and job creation. Government responded to the changing situation by adopting a policy which supported high cost, low density tourism.

This policy was specifically aimed at reducing numbers of independent campers.

This study provides base data against which the effects of the implementation of this policy can be measured.

Foreign exchange contribution.
The study showed that, in 1984, tourism ranked with textiles as the fourth most important contributor of foreign exchange, after diamonds, cattle products and copper-nickel matte.

Social impact.
Whilst there may be social problems associated with increased tourist activity, Botswana's major ecotourist attractions are in areas of low population density. The social impact of ecotourism in the country can, therefore, be minimised. The opportunity exists to avoid many problems experienced elsewhere.

Factors affecting the accuracy of the data.
The accuracy of the data obtained in this field study was affected by several factors. These included concern over confidentiality of trading data leading to some companies withholding information; problems in identifying tour operator earnings; establishing the numbers and expenditure of independent tourists; establishing the size of the various sectors of the industry and finally, the lack of full data on the use of the main ecotourist attractions, the National Parks.

Conclusion.
Against the background of the data presented the hypothesis is considered proven. Ecotourism can be shown to have made a significant contribution to the economy of Botswana in 1984. This contribution was not identified because of the statistical and accounting data collection systems in use in the country at that time.

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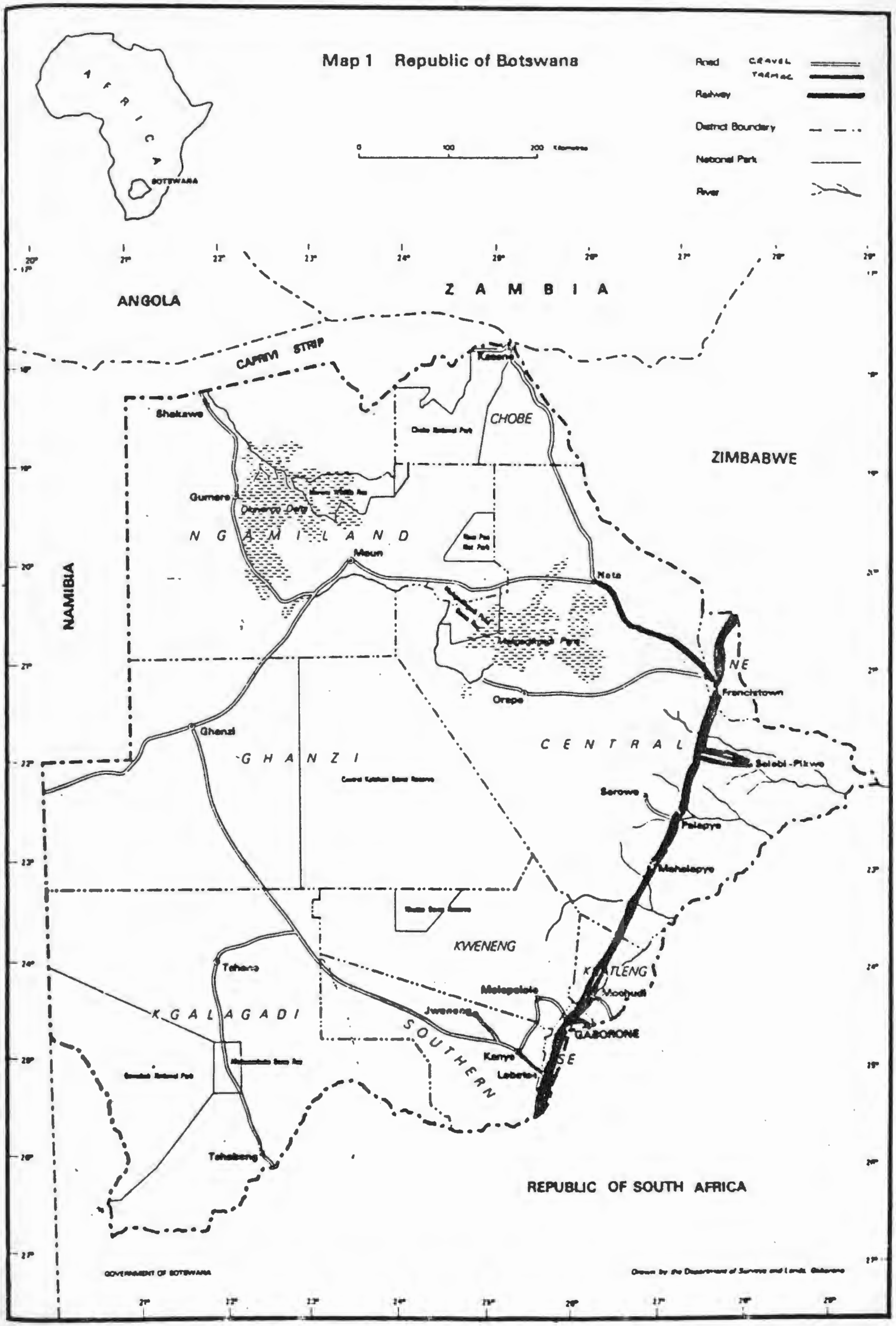

Map 1 Republic of Botswana
Road
Railway
District Boundary
National Park
River
AFRICA
BOTSWANA
0 100 200
ANGOLA
ZAMBIA
CAPRIVI STRIP
ZIMBABWE
NAMIBIA
Kasane
CHOBE
Shakawe
Gumare
NGAMILAND
Maun
Nata
NE
Francistown
Orapa
Ghanzi
GHANZI
CENTRAL
Selebi-Pikwe
Serowe
Palapye
Mahalapye
KWENENG
KGATLENG
Mochudi
Molepolole
GABORONE
Jwaneng
KGALAGADI
SOUTHERN
Kanye
Lobatse
SE
Tshane
Tshabong
REPUBLIC OF SOUTH AFRICA
GOVERNMENT OF BOTSWANA

PART ONE

Part one of this document presents the purpose and importance of the study, data available on ecotourism in Botswana in 1984 and background information on socio-economic and political factors in Botswana at that time.

Chapter 1 identifies the goal of the government of Botswana to use tourism as a means of stimulating economic growth.

Chapter 2 explores the existing data available on ecotourism in Botswana.

Chapter 3 then sets the socio-economic and political background, providing a context for the importance of the study.

Chapter 4 gives the study methodology and problems encountered in the field study.

CHAPTER 1.

THE PURPOSE AND IMPORTANCE OF THE STUDY.

1.1. The goals of the Government of Botswana

In the National Development Plan for the period 1979 to 1985, (NDP5, 1982) the Government of Botswana identified three natural resources on which the economy of Botswana was based:

1. the vast cattle ranges
2. rich wildlife habitats, and
3. a variety of presently exploited or potentially useful minerals.

In the National Development Plan for the period 1985 to 1991, (NPD6, 1986) the Government of Botswana identified two special goals:

1. the need for foreign exchange generation as imports of goods and services consistently exceed exports; and
2. job creation.

The Minister of Finance and Development Planning, the then Vice-President Mr. P.S. Mmusi said, in his introduction to National Development Plan 6:

> "A key thrust will be a continuing emphasis to create productive employment opportunities, particularly in rural areas." (NDP 6)

1.2. Tourism seen as an area of potential economic growth

The Minister of External Affairs for Botswana, Dr. G. Chiepe, addressing the Centre for World Development Education in London in late 1984, is quoted in the Botswana Guardian of 16th November, 1984, as saying that Botswana intended to "increase the volume (of) marketing and promoting tourism...to help diversify the economy" as this would "contribute to a more balanced and growing economy".

Ziffer records that "In addition to bringing in badly needed foreign exchange, tourism is lauded for its role in diversifying the economy, bolstering employment, spreading benefits to rural areas, encouraging the rational use of marginal lands and promoting infrastructure projects which serve other sectors of the economy." (Ziffer, 1989 p.2).

Botswana contains some of the last great populations of wild animals in Africa. As the authors of the National Development Plan said "they represent a tourist attraction that has yet to be fully exploited. Meanwhile, and more important, they make a contribution to the subsistence economy of the country." (NDP5, 1982: 3).

There is a land-use conflict present in the choices implicit in deciding which of the three natural resources upon which the economy is based should be developed. Wildlife and ecotourism constitute a land-use which is incompatible with cattle ranching or mining. In identifying the tourist attraction of wildlife the authors of NDP5 have not addressed the opportunity cost of diminished agricultural growth.

Tourism development is not solely dependent upon Botswana's wildlife resource. Gunn identifies a tourist as "any person who travels who is not a commuter" (Gunn 1988). However, Botswana followed the UN in identifying tourists as:

> "temporary visitors staying at least 24 hours in the country visited and the purpose of whose journey can be classified under one of the following heads:
>
> a. Leisure (recreation, holiday, health, study, religion and sport)
>
> b. business, family, mission, meeting"

(Dixon, personal communication).

If, as previously indicated, there was a need to both broaden the foreign earnings base for Botswana and to stimulate rural job creation, and tourism had the potential Dr. Chiepe indicated, then the development of the tourist industry had a role to play in planning for economic development.

It was, however, unlikely that government could increase activity across the broad spectrum of the United Nations definition of tourism. If persons visit a country for reasons other than as "holiday makers", it is unlikely that government can significantly influence either their numbers or their expenditure. For example, a passenger on a train en-route from South Africa to Zimbabwe or Zambia, or vice versa, must make the rail journey via Botswana. This was the means of transport of many migrant workers in South Africa. The Botswana government can have little positive influence on the numbers of these "visitors". Similarly, whilst government may be able to promote the country as a conference venue it can have only limited influence on the number of "business" visits, given both the worldwide competition to host international conferences and the travelling distance from main population centres to Botswana.

As previously reported, the major tourist attraction in Botswana is its wildlife (NDP5). Tourism based upon the exploitation of wildlife and natural areas has been called "ecotourism". Ecotourism has been defined as:

> "Tourism that involves travelling to relatively undisturbed or uncontaminated natural areas with the specific object of studying, admiring or enjoying the scenery and its wild plants and animals, as well as any existing cultural aspects (both past and present) found in these areas." (Ceballos-Lascurain, 1988).

From the above it is submitted that the "leisure" tourism component was that which was most amenable to Government influence. Ecotourism is the "leisure" area which was most likely to respond to any Government stimulus.

1.3. Potential problems with existing data when attempting to assess the ecotourist industry.

If ecotourism was to be used as a tool for economic growth then it was important that the Government be able to measure and evaluate the tourist industry to enable it to identify the impact of any decisions it may take.

For reasons set out in more detail in Chapter 2, this evaluation could not be undertaken. The 1984 national accounting procedures or statistical reporting do not permit an assessment of ecotourism. No methodology exists whereby comprehensive data on the ecotourist industry in Botswana at that time could be obtained. Particularly as, on the basis of methods of reporting:

* **Foreign exchange earnings and internal cash flows attributable to tourist activity are not identifiable.**

Botswana needed to broaden the base of its economy and move away from dependence on the three current major sources of foreign exchange i.e. diamonds, beef products and copper-nickel matte. Ecotourism offered an opportunity to diversify but no method existed whereby that activity could be monitored. The international tourism receipts, that is the payment for goods and services made by foreign tourists, could not be readily identified.

* **The number of formal sector jobs attributable to the ecotourist industry was not known.**

Botswana had a need for the creation of employment for its growing population. That need was particularly felt in the rural areas. As ecotourist activities in Botswana tend to be focused on wildlife they take place in the rural areas. Data on job creation opportunities via ecotourism is of value to government. This data is not available.

* **Informal sector employment creation has not been identified.**

Ecotourists spend money on handicrafts and trips in dug-out canoes. Tourist camp operators pay for building materials, thatching etc. The amount of money spent and the numbers of persons supported by these activities were not measured in any form.

* **The number of persons who undertake ecotourist activities in Botswana cannot be identified.**

Data needed to plan for the numbers and types of facilities for the ecotourist sector were not available;

* **The seasonality of ecotourist visits and preferred destinations were not known.**

The government, which runs the National Parks of Botswana and provides tourist facilities therein, had no factual data on when peak visitor periods occurred or which campsites were preferred. Consequently, planning for expansion, staffing or diversity of traffic was carried out in an unstructured manner.

* **The number of tour companies operating in Botswana was unknown.**

It is important to know the size of the ecotourist industry, for example, the capital invested, infrastructure created, number of jobs created, re-spending within Botswana, contribution to Government, if a meaningful assessment of the potential for growth was to be evaluated. This information was not available.

1.4. Hypothesis underlying this study.

Existing government data and reports did not identify tourism as a major economic factor in Botswana. The hypothesis underlying this study is that tourism was making a significant contribution to the economy of Botswana in 1984 but that this was not reflected because of the statistical and accounting data collection systems in use in the country.

1.5. The purpose of this study.

The purpose of this study was to develop and test a methodology to give an evaluation of the contribution of the ecotourist industry to the economy of Botswana.

More specifically, it was intended to identify if ecotourist activity in Botswana made a significant contribution to the economy as measured in terms of foreign exchange earnings and both formal and informal job creation.

By means of the methodology developed it was intended to create a broad data base on ecotourist activity in Botswana in 1984 identifying:

1. the amount of foreign exchange generated for Botswana by the ecotourist industry;
2. the number of tour operators, safari lodges and hotels involved in the ecotourist industry and the amount being spent within Botswana by the these companies;
3. the number of companies/individuals supplying goods and/or services to the ecotourists and tour operators and the value of those goods/services;
4. the flow of funds generated through these companies;
5. the number of persons employed as a result of ecotourist activity and the number of people supported by those employees;
6. the informal sector activity stimulated by ecotourism and an estimate of the amount of money flowing to the informal sector;
7. the direct income attributable to ecotourism which was accruing to central and local government through taxes, licences, payment for services etc;
8. the geographical areas where the ecotourist industry had greatest impact; and
9. the numbers, countries of origin, destinations and seasonality of ecotourists in Botswana.

1.6. The importance of this study

The baseline data on ecotourism, provided by this study, will enable future studies to evaluate any changes which may occur. This information will be of value to:

1. the Government of Botswana in the planning of foreign exchange generation, rural job creation and land use planning in marginal areas;
2. the Department of Wildlife and National Parks who carry responsibility for the control of tourist traffic in wildlife areas and the provision of facilities for such traffic;
3. the Department of Tourism which has responsibility for tourist promotion and the provision of the tourism marketing infrastructure at government level;
4. the private sector, which has developed the tourist industry infrastructure and will need to plan the development of the industry; and
5. international aid organisations seeking to promote tourism as a means of economic development.

1.7. Structure of this document.

Part 1 of the dissertation gives the background to the study. Chapter 2 sets out the data that existed on tourism in Botswana in 1984. Chapter 3 gives a background to Botswana, the country and its people to place the study in context. Chapter 4 gives the study methodology and problems encountered in the field study.

Part 2 presents the results of the study, differentiating between data on:

- tour operators, safari lodges, hotels and motels (Chapter 5)
- independent ecotourist activity (Chapter 6)
- the flow of funds and job creation in industries associated directly with ecotourism (Chapter 7)
- employment and employee benefits (Chapter 8)
- ecotourism and government (Chapter 9)
- subsequent developments in the industry (Chapter 10).

Chapter 11 then presents the conclusions of the study.
The Appendices contain the detailed data upon which the conclusions are based.

CHAPTER 2.

EXISTING DATA ON TOURISM IN BOTSWANA

This chapter sets out the structure of the tourist industry in 1984. The systems of national accounting and tourist data collection in use in Botswana at that time are presented. The reliability of the data presented by government, and problems associated with attempts to evaluate ecotourist activity on the basis of such data, is then examined.

2.1. Components of the tourist industry

Writing in The Tourist Review, Sessa sees tourism "not as a tertiary service industry but as a real industrial process which transforms a raw material, namely natural and cultural resources, into a final tourist product." (Sessa 1975: 45).

The tourist industry can be described as that sector of the economy which supplies facilities or services to enable a tourist to:

* travel;
* find accommodation;
* obtain food and drink;
* undertake various activities, whether for business or pleasure; and
* have the opportunity to purchase goods.

These components of the industry are linked by:

* good communications, and
* well trained staff.

Tourism can therefore be described as the activities of tourists and the supporting tourist industry.

2.2. The system of National Accounts in Botswana

In common with most members of the United Nations, Botswana used the System of National Accounting recommended by the United Nations Department of Economics and Social Affairs (UN, 1968). The UN system identifies thirteen major categories of activity. (UN, 1968: 35).

At the time of this study, Botswana had condensed the thirteen categories of the UN system in the reporting on Gross Domestic Product (GDP) to reflect ten categories:

Agriculture;
Mining and quarrying;
Manufacturing;
Electricity and water;
Construction;
Wholesale, retail trade;
Transport and communications;
Financial institutions;
General government;
Household, social and community services;
and a "dummy" sector to account for variance.

(Statistical Bulletin 10.1: 5)

The data collection process was geared towards aggregation under the specified final categories. From a very early stage all figures were grouped under these basic headings. The Government Statistician, Mr. Modise, explained that the figures were coded at source under the categories given. To collate them differently would have required a re-grading of all input data and a modification of the computer programme. This was not considered practical. (Modise, personal communication, 1985).

Because of the system of aggregation it is not possible to isolate individual sub-divisions to provide groupings across categories. Nor is it possible to extract data specifically related to tourist input from the sectors of construction, wholesale/retail or transport and communications, all of which activities are undertaken in the tourist industry. (Modise, Personal communication, 1985.)

Much of the input to the national statistical process in Botswana was via secondment of personnel from European aid agencies. Because of this there was a strong adherence to the basic system propounded in the UN System of National Accounts, and little diversification which took into account local aberrations (Modise, Personal communication, 1985).

2.3. Tourists and tourism

As with its national accounting system, Botswana followed the UN in identifying tourists as:

> "temporary visitors staying at least 24 hours in the country visited and the purpose of whose journey can be classified under one of the following heads:
>
> a. Leisure (recreation, holiday, health, study, religion and sport)
>
> b. business, family, mission, meeting"

(Dixon, personal communication).

Following the recommendations of the United Nations, Botswana collected data on persons arriving in the country by purpose of entry based upon the categories of:

Business,
Holiday,
Employment,
In-transit,
Returning resident,
Day visitor, and
Other.

(Appendix Q Table 29).

In attempting to make an analysis of an industry containing many constituent parts, one is faced with the problem that both the United Nations accounting guidelines and tourism definitions were very broad. Such broad definitions may not specifically meet the needs of individual countries.

Abedian comments that "It is often argued that the statistical documentation in these countries (the developing nations) is poor and its resultant data is not reliable, actually too inaccurate to be useful" (Abedian, 1982:50). This problem of poor, unreliable data appears to be the situation in Botswana as regards tourism. Such tourist industry data as is presented contains major errors.

Ziffer makes the point that "There are no published statistics for the size of the ecotourism market or for the numbers or expenditures of nature based tourists in LDCs. These statistics, or even "guesstimates", do not exist because there is little agreement regarding the definition of these terms and what exactly should be included in the tabulation. The matter is further compounded by the record keeping of host countries which may not accurately track visitors and their spending". (Ziffer, 1988, p.8).

2.4. The reliability of the statistical data produced in Botswana

The Central Statistics Office listed 15 companies as being active in 1981 under category 632, "Safari companies, small hotels and Lodges." (Fowkes, 1982:115). Undertaking a marketing survey for the same year, M. Gardner identified 28 lodges, camps or safari companies that were active in the tourist field. (Gardner, 1981:ch.4). To compound this discrepancy, 5 of the companies identified by the Central Statistics Office were not tour operators. This left only 10 tour operator companies on record, compared with the 28 identified by Gardner. (Fowkes, 1982:115).

In this study, undertaken in 1984, sixty seven companies or individuals were identified which could be classified as safari lodges or tour operators.

The Statistical Bulletin Volume 8-No. 4 of December 1983 presents, in Table 4, a set of data on Departing Visitor Expenditure (Appendix S). This reflects a total expenditure of P41 695 000 for the year, a figure authoritatively quoted by government staff (Dixon personal communication, 1984). Bulletin Volume 9-No.1 of March 1984, reprints the same Table 4 with the first two months of 1984 data added. But the 1983 expenditure figure now reflects a total of P28 714 000 a drop of P13 281 000, whilst the number of departing visitors is shown to have risen to 499 000 from the previous figure of 346 700. No explanation could be found for the change (Jean-Hanson personal communication, 1984).

In the 1981 statistical records the companies identified in Classification 632 were recorded as having a total income of P362 775 and a total expenditure of P415 984 in that year, i.e. an operating loss of P53 209. Research during 1982 showed that these figures presented an incomplete picture of the activity of the tourist sector of the economy. (Fowkes, 1982: 120). That conclusion from the 1982 research has been confirmed by this study which showed that there were at least 22, not 10, Botswana registered companies in existence in 1981 (as opposed to companies operating in Botswana as measured by Gardner). The earnings of the industry must, therefore, have been substantially higher than the records show. No system exists for measuring informal labour contributions to those companies and few measurements were made of many of the goods or services provided.

The Central Statistics Office gives declared expenditure by departing visitors in 1981 as P19 103 962 (Tourist Statistics, 1981:12). However, visitor expenditure does not equate with ecotourist spending. It is the latter that it is sought to measure in this study. Other sources of data are therefore needed.

2.5. Classification of tourists

In the 1983 statistics on arrivals in Botswana (Appendix 13, Table 29) 300 800 persons are shown as entering the country who were not returning residents. 70 200 (23%) of these declared they were "on business", 21 000 (7%) stated they were "in transit" and 62 000 (21%) were "day visitors", 81 900 (27%) identified themselves as being "on holiday".

Some of those who were classified as "day visitors" may well be ecotourists. There was, for example, an established two way traffic between the Victoria Falls, in Zimbabwe, and the Chobe National Park in Botswana, whereby visitors to the one took a one day excursion to visit the other.

A similar problem exists in classifying the person who visits Botswana on business but who flies out of Gaborone at lunch-time on Friday visiting a tourist camp in the Okavango Delta. That person then returns on Monday morning to continue his business. He becomes an ecotourist during the weekend, making a contribution via the ecotourist industry. Existing records do not capture that activity. This is not a problem exclusive to Botswana. Record of such a change of status can only be as accurate as either the documentation required by the host country or the accuracy of the reporting of the departing tourist.

2.6. Identifying the allocation of tourist expenditure

In 1983, departing visitors were shown as having a total expenditure within the country of P40 652 548. Following the Gunn definition of a tourist then all of this expenditure can be correctly attributed to tourism. However, the expenditure of departing visitors is not broken down by purpose of visit. It is probable that ecotourists would spend more, on average, than, for instance, those in transit, but this figure cannot be identified.

The difficulty in evaluating the true input of funds is again compounded in that ecotourists may well pay for their visit outside Botswana, booking through travel agents etc. A portion of this payment is then brought into the country by the tour operator with whom they are staying. This amount is not stated as expenditure within the country by departing persons and is, again, not identifiable.

2.7. Prior studies on tourism in Botswana

There have been two major studies on tourism in Botswana. The first in 1970 through a Canadian consultancy, Huntington, Rockford International. The second was by the Irish Tourist Board in 1979. Both of these studies concentrated on the tourist potential of the country and the tourist infrastructure that was seen as necessary to achieve that potential. Both of these studies were based on the broad concepts of providing facilities to attract visitors to the country. Neither sought to identify past patterns of tourists by type or by expenditure patterns as, at the time of those studies (1970 and 1979), ecotourism was little known in Botswana.

A study by the author (Fowkes, 1982) examined the conflicting goals of the government and the tour operators in the tourist area, but this did not address economic issues. Tourism has also been touched upon by various workshops from time to time (Bibliography) but, none of these studies conducted a detailed evaluation of ecotourist activities or needs.

2.8. The development of ecotourism in Botswana

In 1984 organised ecotourist activity in Botswana was a relatively new phenomenon (Tlusty 1987 p3). Despite an abundance of wildlife and the unique geographical features of the Okavango Delta, the Kalahari Desert system and Mkgadikgadi pans complex, it was only in 1969 that the first permanent tourist camp, a hunting lodge, was established. An undeveloped infrastructure, particularly very poor roads, prevented access to much of the country and ecotourist activity was restricted to hunters and a "rugged few" in expensive four-wheel drive vehicles (Irish Tourist Board, 1979: 150).

Commencing in the late nineteen-seventies other tour operators arrived and developed new tourist facilities. Concurrently road systems were improved. Over the next 10 years this led to a dramatic growth in ecotourist activity in the country. This growth was unplanned and unco-ordinated (Tlusty 1987. p3 and Campbell, personal communication). A European Community investigator, Dr. V. Tlusty, commented "It (is) therefore imperative to identify objectively the role the private sector has been playing in tourism." (Tlusty, 1987. p4).

The Government of Botswana responded to the increasing activity and issued a draft policy statement on tourism in Botswana with new Government control structures being anticipated. (Tourism Policy. 1985.) If the tourist industry was assuming a more important role in the economy of the country, but data on its actual performance was incomplete, then the planners - and executors - of the governments new policy need accurate data to ensure success in policy implementation.

Summary

The Central Statistics Office of the Government of Botswana produces regular statistical bulletins on tourism in Botswana. This data suffers from several defects as:

1. it is based upon the full, very broad United Nations definition of tourism. Thus it takes into account expenditure of all departing visitors from the country without identifying expenditure by "reason for visit";
2. the various components of the tourist industry are categorised under different headings. This categorisation is under the particular industry in which activities are deemed to fall. No composite collation of tourist industry data was made;
3. no system existed for measuring the income flowing to informal sector participants; and,

4. no system existed for measuring the total foreign exchange earnings generated by tourist activity if payments were made outside the host country and imported by third parties.

If one is attempting to evaluate the contribution of ecotourism to the economy of Botswana there is, therefore, a twofold obstacle:

1. the system of national accounting, which did not clearly identify those sectors that were tourist industry specific; and
2. the inaccuracy of the statistical data that is available.

CHAPTER 3.

BOTSWANA, THE COUNTRY AND ITS PEOPLE

This Chapter gives background on the Republic of Botswana, as a context to the study. It contains information on the geography of the country, its natural environment, demography, economic development and political system. In Botswana live the Batswana people (singular Motswana) speaking the language Setswana.

3.1. Geography

Botswana is a landlocked country. It is bounded on the south and east by South Africa, on the north east by Zimbabwe and on the north and west by the Caprivi strip and Namibia. With a surface area of some 582 000 km^2 Botswana is approximately half the size of the Republic of South Africa. In 1984, the bulk of the population of just over 1 million people lived on the eastern edge of the country. Along this eastern edge there is reasonable rainfall and arable land is found.

The majority of the country is a level, featureless terrain. It has an average height of 1 000m above sea level. Occasional ridges protrude above the woodlands or dry grasslands which grow on the dunes of the Kalahari Desert system. In the north-west the Kavango River flows from the Angolan Highlands to form the vast wetland system of the Okavango Delta. In the centre lies the dry expanse of the Mkgadikgadi pans system.

Botswana has an arid to semi-arid climate with an average annual rainfall of only 475 mm. This rainfall is both erratic and unevenly distributed. Rainfall ranges from less than 250 mm in the south-west to more than 650 mm in the north. Most of this rain falls between November and April.

As a result of the hot dry climate, the evaporation rate is high and surface water scarce. Ninety-five percent of the surface water resources of Botswana are in the Okavango and Linyanti/Chobe systems in the north of the country. These are primarily derived from run-off from the Angolan Highlands to the north. Elsewhere the low, erratic rainfall is absorbed by the sands of the Kalahari system and only in the east does rainfall result in river flow.

The poor quality of Botswana's soil and the erratic rainfall combine to make arable agriculture a risky venture and less than 5% of Botswana's land is considered suitable for crop cultivation. By far the most widespread land use was the grazing of cattle, sheep or goats. Beef production was a major source of foreign exchange and cattle outnumber people in the country several times over.

3.2. Demography

In 1984 Botswana had an annual population growth rate of 3% p.a. (NDP5: 6). Approximately 45% of the population was under 15 years of age. A further 4% was over 64 years of age. Those within the working age groups (i.e. roughly those aged between 15 and 64 years) formed about half of the population i.e. ± 500 000 persons. Formal sector employment provided work for only 100 600 people (NDP6:28).

Historically many males were employed as migrant labourers on South African mines. With changes in South African government policies, which encouraged the employment of South African workers in preference to foreigners, that source of employment was being curtailed. Mine employment dropped from 20 800 in 1978 to 18 800 in 1983 (NDP6:30).

3.3. Economic development since independence

Botswana attained independence from Great Britain in 1966. At independence, the country had a very poorly developed infrastructure with under 100 km of tarmac road; a main railroad line running along the eastern border of the country linking Mafeking in South Africa to Bulawayo in Rhodesia and little else in the way of modern facilities. The economy was almost totally based upon cattle and Botswana was classified as one of the least developed countries in the World (Hartland-Thunberg, 1978:14).

Dahl in a survey of the economic and social development of Botswana writes "(in 1966) the social and economic outlook was discouraging. To generate domestic resources for development was unthinkable - even the most modest recurrent central government budget would have to be substantially supplemented by the U.K. .... perhaps for as long as ten to twelve years. Few Independence ceremonies can have taken place under dustier, bleaker economic circumstances." (Dahl, 1981:2).

Shortly after independence, however, diamonds were discovered in the country and the Orapa Diamond mine opened in 1971. The mining of copper-nickel matte and coal had also been developed. However, the thick covering of Kalahari sand, sometimes up to 120 meters deep, makes mining exploration difficult and expensive.

Imports of goods and services have consistently exceeded exports for Botswana highlighting the need for foreign exchange generation. That situation can be seen in the 1984 Table of Exports and Imports as set out in Exhibit 1. (Bank of Botswana, 1984). The currency in use in Botswana is the Pula (P) with 1 Pula = 1,24 South African Rands(R) at December 1984. The May 1992 exchange rate was 1 Pula = R1.31.

Out of total reported exports of some P875 million, in 1984, diamonds contributed P616 million (70.4%). Meat, animals, hides and skins rank second at P93 million (10.6%). Copper -nickel matte contributed P78 million (8.9%). Together these three products made up a total of 89.9% of all exports.

	Exhibit 1. Value of exports and imports - 1984		
		(P million)	%
	Diamonds	616	70.4
	Beef (1)	93	10.6
EXPORTS	Nickel-copper matte	78	8.9
(f.o.b)	Other exports	57	6.5
	Re-exports	31	3.5
	Total	875	100.0
IMPORTS (c.i.f.duty-inclusive)		985	
Notes (1) Includes hides and skins and beef products			

As can be seen from Exhibit 1, two sectors, mining and agriculture, constituted the bulk of economic activity. Within the mining sector diamond mining was predominant and the agricultural sector was dominated by the cattle industry. "There is excessive dependence on two products ...... and what happens to the two products determines what happens to employment, the balance of payments and GDP growth." (Mogae, 1981).

The 200 percent growth in the size of the national herd between 1966 and 1981 (NDP6, 1986:13) led to increasing pressure on range lands previously occupied by wildlife. The increase in cattle ranching thus occupied land which could provide a resource base for growth in the tourist industry. The cost of such growth was the opportunity of diversifying the economy through tourism.

3.4. The political system in the country

In reviewing progress since independence NDP6 reported that Botswana is a non-racial democracy and that the governing party, the Botswana Democratic Party, had been returned to power in each of the five elections held since 1966. During that time the GDP had grown from P129million to P968,9million at 1979/80 values. The national cattle herd increased from $\pm$1 million head at independence to a peak of 2 967 000 head in 1981. (NDP6, 1986:13)

Until the discovery of diamonds the dominant industry in the country was cattle. Cattle are also a cultural store of wealth for Batswana. The cattle lobby, for both economic and cultural reasons, exercises considerable influence. The growth of the national herd, whilst representing an increase in wealth, also led to demands for more land for cattle. Fences were erected to separate cattle and game animals to prevent the spread of foot and mouth disease. Aerial spraying of insecticide was undertaken to reduce the tsetse fly population which spreads disease to cattle and humans.

All of these actions brought cattle owners into conflict with wildlife conservationists as the land into which cattle expanded was previously open wildlife range. Fences disrupted animal migratory routes and spraying killed other insects beside the tsetse fly, thus disrupting the food chain (Campbell, personal communication). A further cause of the conflict was that any expansion of ecotourism activity assumes land being available for wildlife and for the tourist activity based upon that resource. There is, therefore, an opportunity cost in the decisions on the choice of land use; cattle versus wildlife.

Summary

In 1984, Botswana was a recently independent country at an early stage of development. It had a limited capital infrastructure, poor agricultural resources, a growing population and low formal sector employment. The country had been politically stable and had made a noteworthy transition from the poor economic position at independence in 1966 to that prevailing in the country in 1984. The positive economic outlook was however, due mainly to a single product, diamonds.

Cattle were both a major economic activity and cultural component of the country. Growth in human and cattle populations was leading to a conflict over the use of land for agriculture or for tourist activities based upon wildlife areas.

CHAPTER 4.

THE STUDY METHODOLOGY
AND
PROBLEMS ENCOUNTERED IN THE FIELD STUDY

This chapter describes the construction of a model of the potential flows of ecotourist spending in the economy. From the model data needs were identified. Direct questioning of participants was the selected method of data collection and questionnaire design is presented. The study is shown as being conducted in four phases; preparation; questionnaire design and testing; data collection; evaluation and analysis. The basis for interviewing tour operators, associated industries and assessing informal sector size is presented together with the sample sizes obtained.

Interviews were undertaken, or questionnaires received from:

56 Tour operators;
14 Hotel or Motel managers;
73 Representatives of Associated Industries;
177 Employees of companies;
62 participants in the informal sector;
18 government or para statal employees; and
295 independent ecotourists

The problems encountered are then examined, indicating:

* reluctance on the part of some interviewees to release confidential company data;
* the inadequacy of DWNP records;
* the inability of companies with mixed trade to clearly identify the ecotourist component; and
* the difficulty in determining informal sector income and total ecotourist expenditure.

4.1. The scope of the study

The study was restricted to an evaluation of the contribution of the ecotourist industry to the economy of Botswana in 1984 when the bulk of the study was undertaken. Data from that year forms the core of the project.

4.2. Constructing a model of the tourist industry

As was set out in Chapter 2, the tourist industry is seen as comprising those companies which derive their existence from participation in the provision of the goods or services which lead to the final tourist product.

To assist in an evaluation of the components of the industry, and the flow of funds through the economy, two models were identified as being needed. One to establish the structure of the tourism industry. The second to trace flows of funds through the economy of the country. Reference was made to previous studies on tourism to ascertain if previous studies/models of a similar nature had been created. No suitable models were identified. New models were therefore developed. These are presented in Exhibit 2 and Exhibit 3.

The first model, Exhibit 2, sets out the various types of activity. The second model, Exhibit 3, was prepared showing the component sectors of the industry and the potential flow of funds from ecotourists through the economy in order to identify areas of economic activity and to facilitate the collection of data. Both primary and secondary flows were plotted, Exhibits 3.2.to 3.6. Points on the model were then identified where it was thought that these flows could be measured.

Exhibit 2. Model of the tourist industry

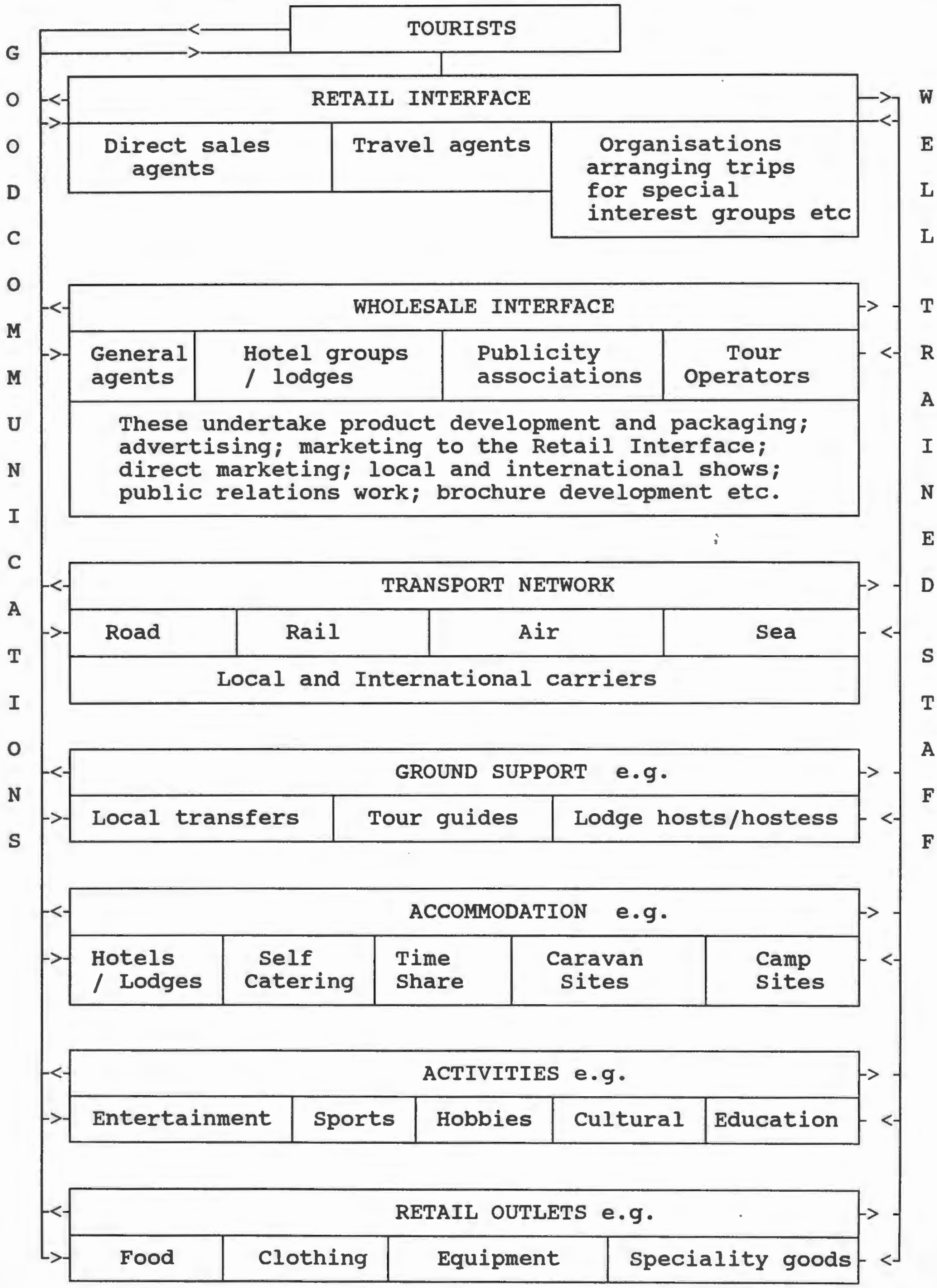


Exhibit 3

Model of flow of funds through the economy
(See flow charts on pages 29 to 36)

Key to Exhibit 3.

The model has been broken into a series of components and flows for ease of reference (Exhibits 3.1. to 3.5). These lead to a composite model in Exhibit 3.6. Exhibit 3.6. can be extended to permit reference to the model whilst working through the key.

Bracketed references in the key refer to boxes or line numbers on the model.

* Ecotourists (Box A) visit Botswana either as clients on tours organised by tour operators (Box B) or as independent travellers making their own arrangements. The independent travellers may use facilities offered by tour operators whilst in the country.

* Ecotourists booked with tour operators or safari lodges pay the operator a fee for accommodation, transport, food, drink and some recreational facilities [line 2]. These payments may be made outside Botswana and portions were then brought to Botswana by tour operators.

* Tour operators employ staff (Box G) who receive wages and benefits [line 9]. These employees in turn support their families and dependants (Box I) [line 20], and buy food from stores [lines 16 and 17].

* Tourists may pay tips directly to employees [line 5].

* Tour operators also employ casual labourers (Box F) from time to time, paying them for their services [line 8]. These people also support dependants [line 18].

* Tour operators purchase supplies and services from associated industries (Box C). The associated industries supply a total range of goods e.g. fuel, food, liquor, clothing, curios and professional services e.g. secretarial, legal, accounting, banking [line 10] hiring staff to do so [line 11].

* Tour operators use the services of the informal sector (Box E) in the form of handicraft makers, dugout polers and in the supply of local building materials e.g. thatch, poles [line 7].

* Tourists travelling independently will stay at hotels, motels (Box D) or safari lodges (Box B) paying for food and accommodation [lines 2 and 4]. They will buy vehicle fuel, food, liquor, clothing and hardware items etc. [line 3] from associated industries (Box C). They have their vehicles repaired or buy spares (tyres, batteries etc). If not travelling by vehicle to Botswana, independent tourists will fly in to the country and then use vehicle hire facilities.

* Hotels and Motels (Box D) buy food, fuel, supplies and services from the Associated Industries [line 12] and employ staff to serve the tourist trade [line 13].

* Independent tourists contribute to informal sector activity (Box E) by buying handicrafts from curio shops or from people selling on the side of the road. They also hire dugouts and give tips [line 1]. These monies are used to support dependants (Box I) [line 18].

* Independent tourists pay fees to government (Box H) to enter and camp in National Parks. They pay government for road tax on their vehicles, communication, postal services etc., [line 6].

* Central and local government (Box H) receive income from tour operators and safari lodges in the form of entrance and camping fees to the DWNP, licence fees, concession costs, lease fees, etc., [line 21]. Government receives tax from petrol or liquor sales and the excise duty paid on imported items, [lines 21 to 24] as well as the personal tax paid on wages. [line 22].

* Government also spends on behalf of tourists, creating posts in the Departments of Tourism; Wildlife and National Parks; Customs and Excise; Immigration, etc. Government caters for tourists through, for example, the upgrading of airports or through the provision of campsites and roads in National Parks etc.

* Because of the limited industrial and retailing base in Botswana, funds leak from the economy via imports.

Exhibit 3.
Model of flow of tourist expenditure within Botswana.
3.1. Components of the industry.

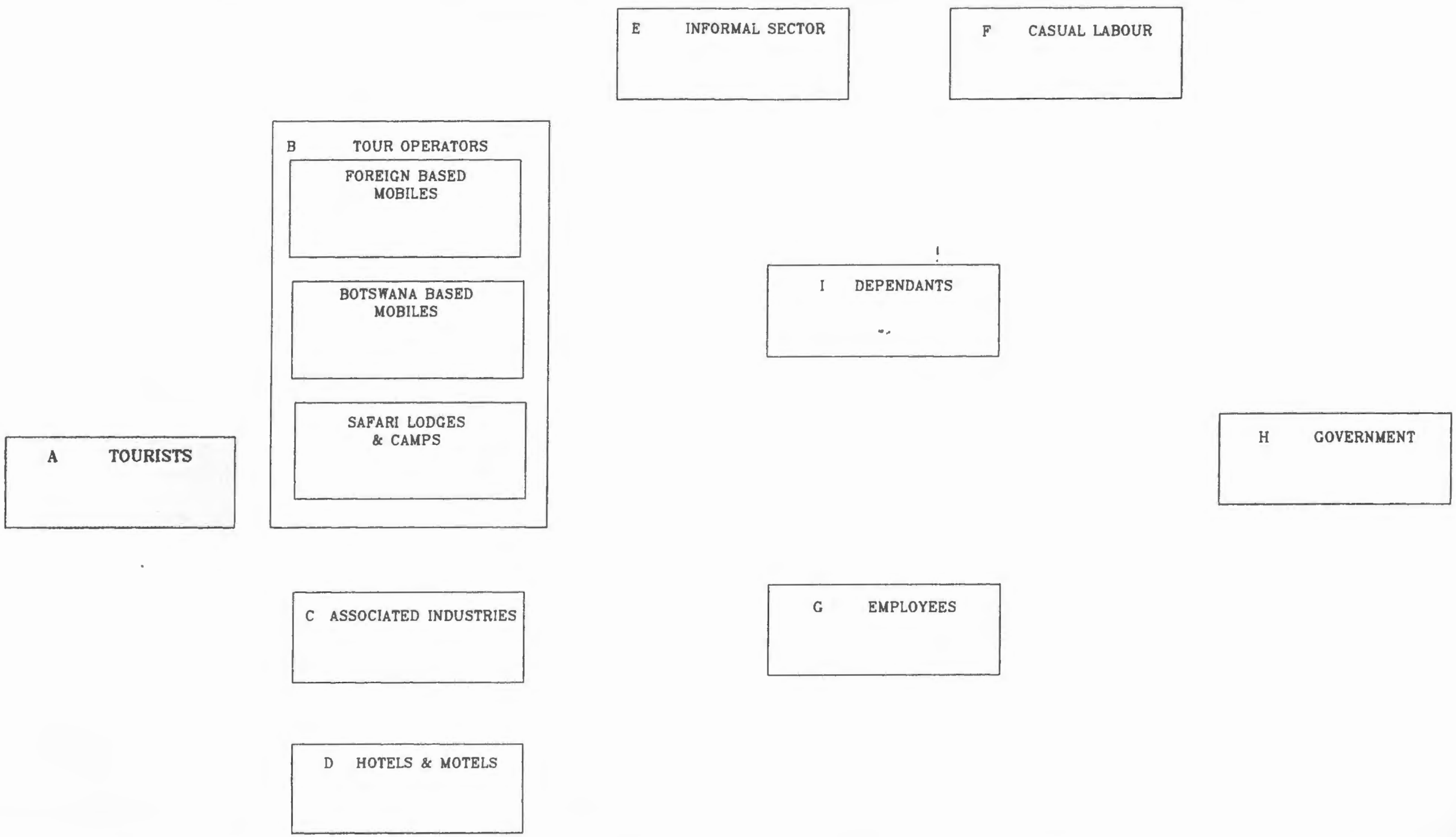


Exhibit 3.

Model of flow of tourist expenditure within Botswana.

3.2. Direct expenditure by tourists.

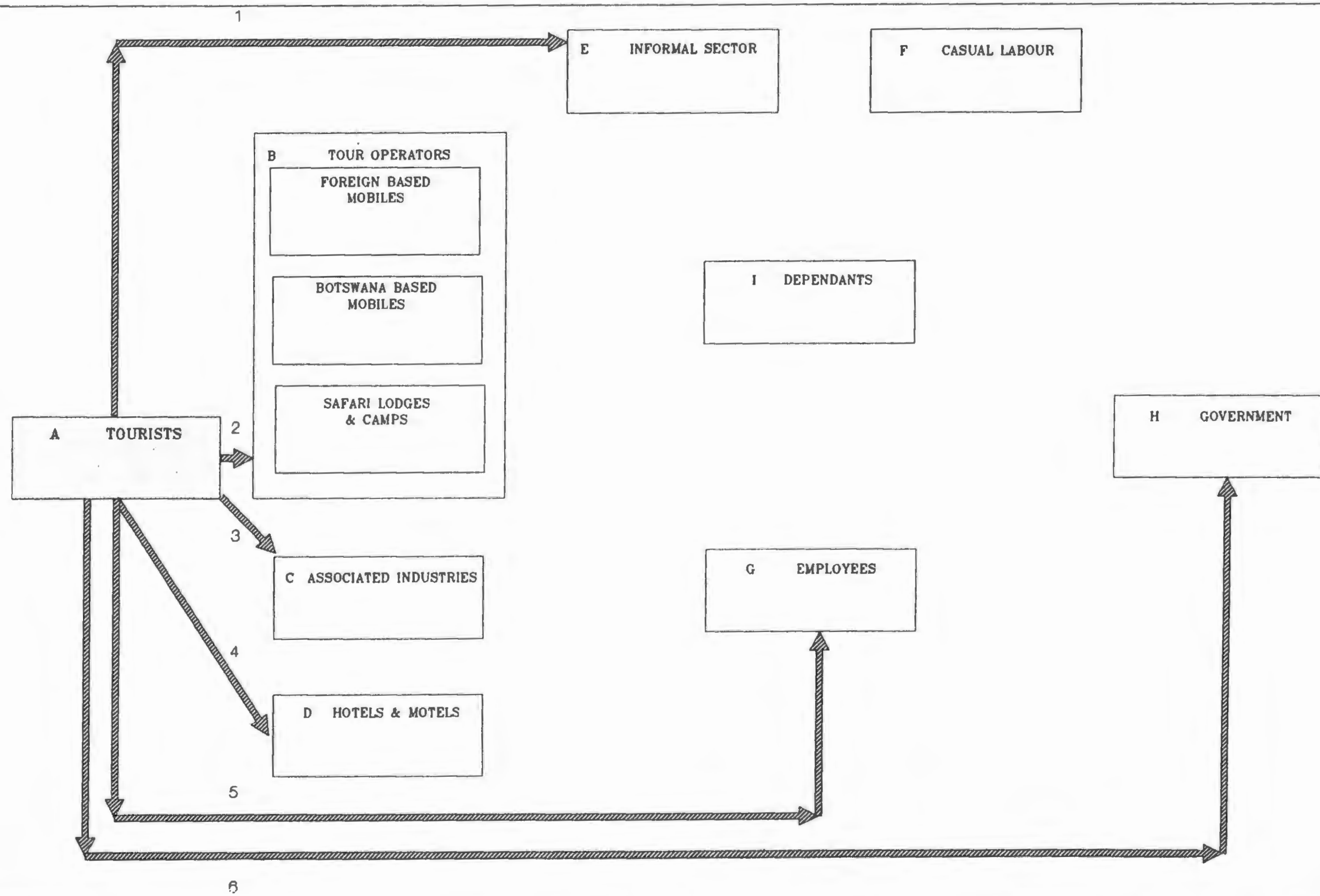


Exhibit 3.

Model of flow of tourist expenditure within Botswana.

3.3. Secondary flows for goods and services.

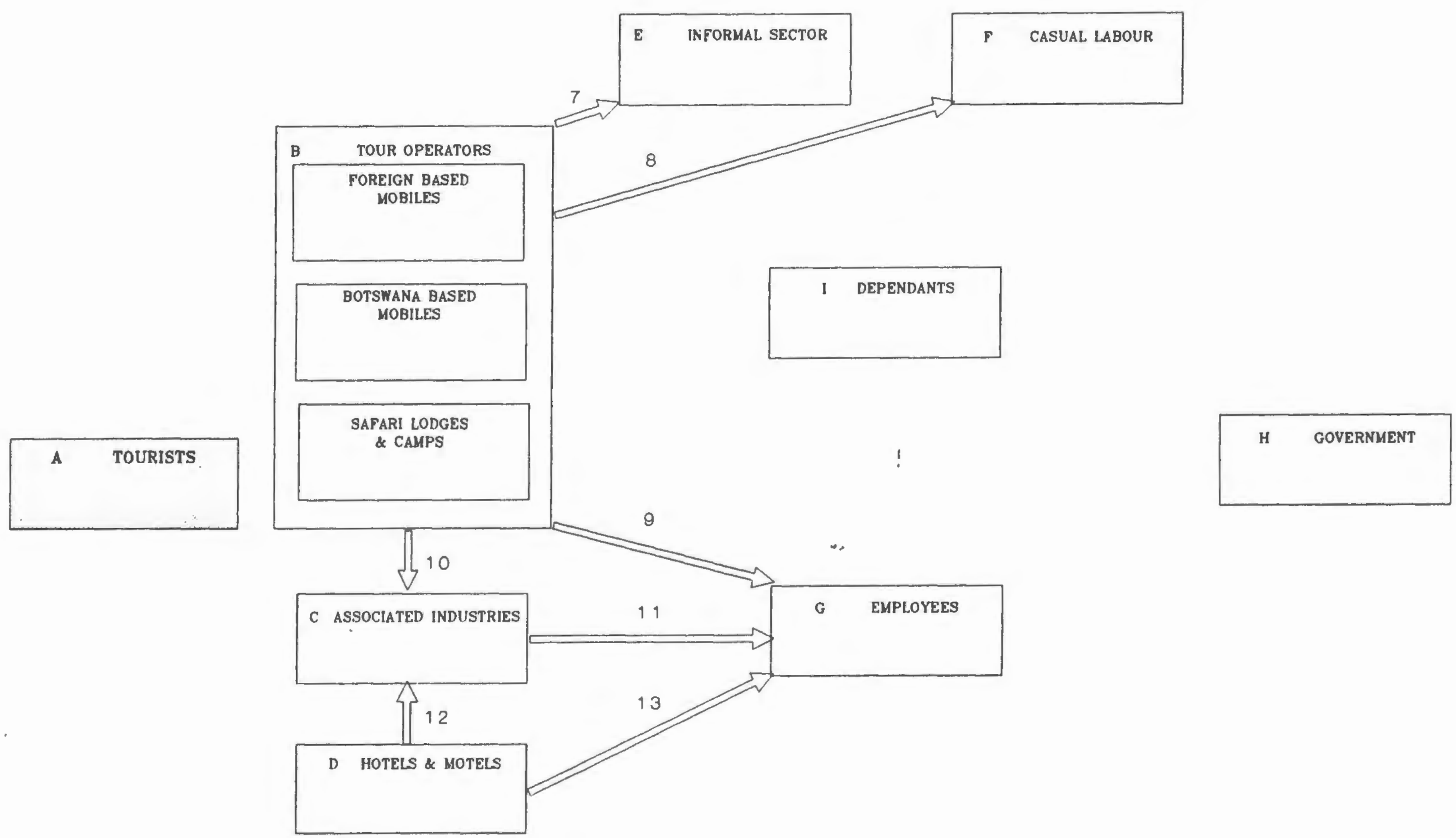


Exhibit 3.
Model of flow of tourist expenditure within Botswana.
3.4. Re-purchasing by employees etc..

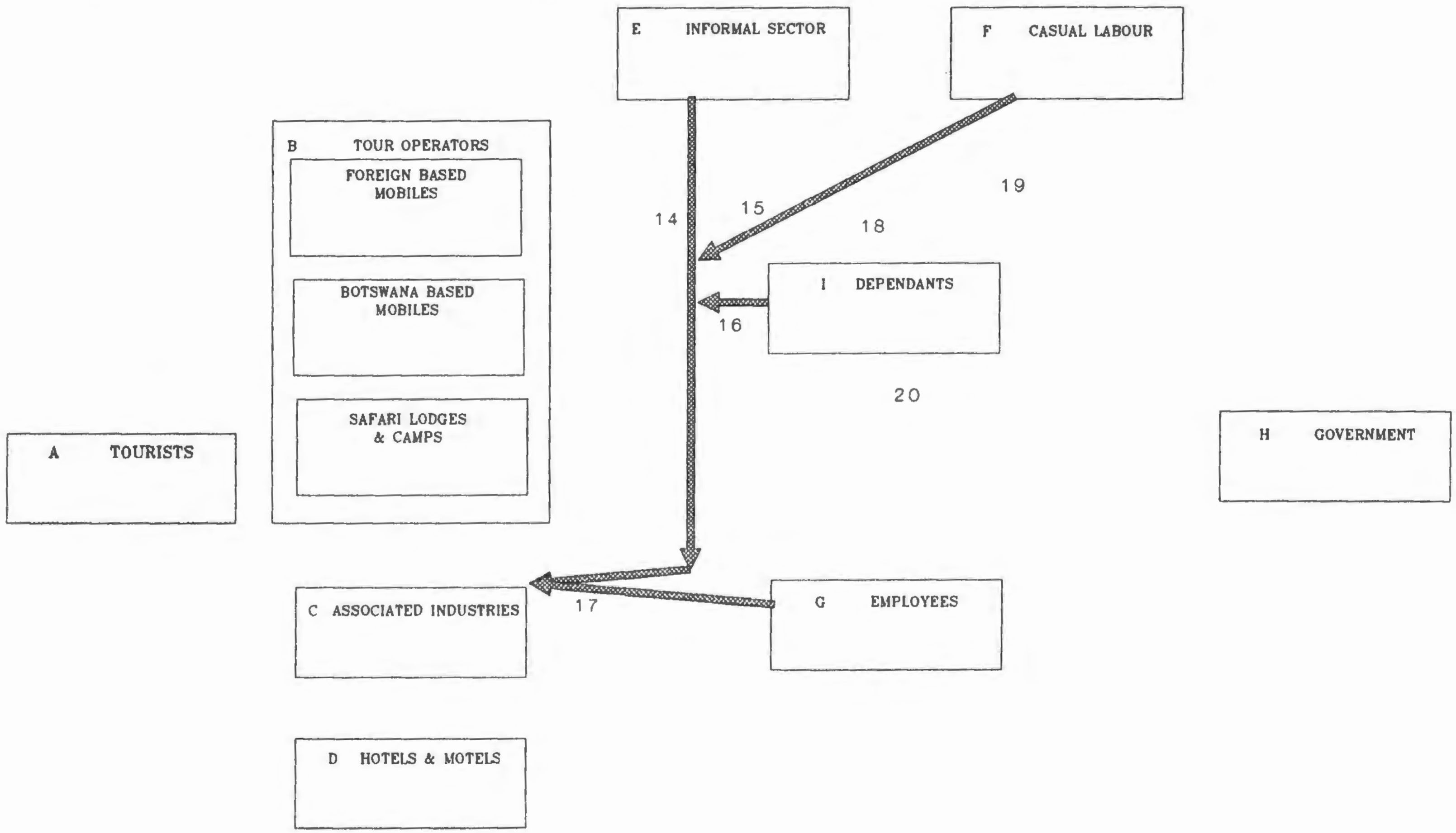


Exhibit 3.

Model of flow of tourist expenditure within Botswana.

3.5. Secondary flow of funds to Government.

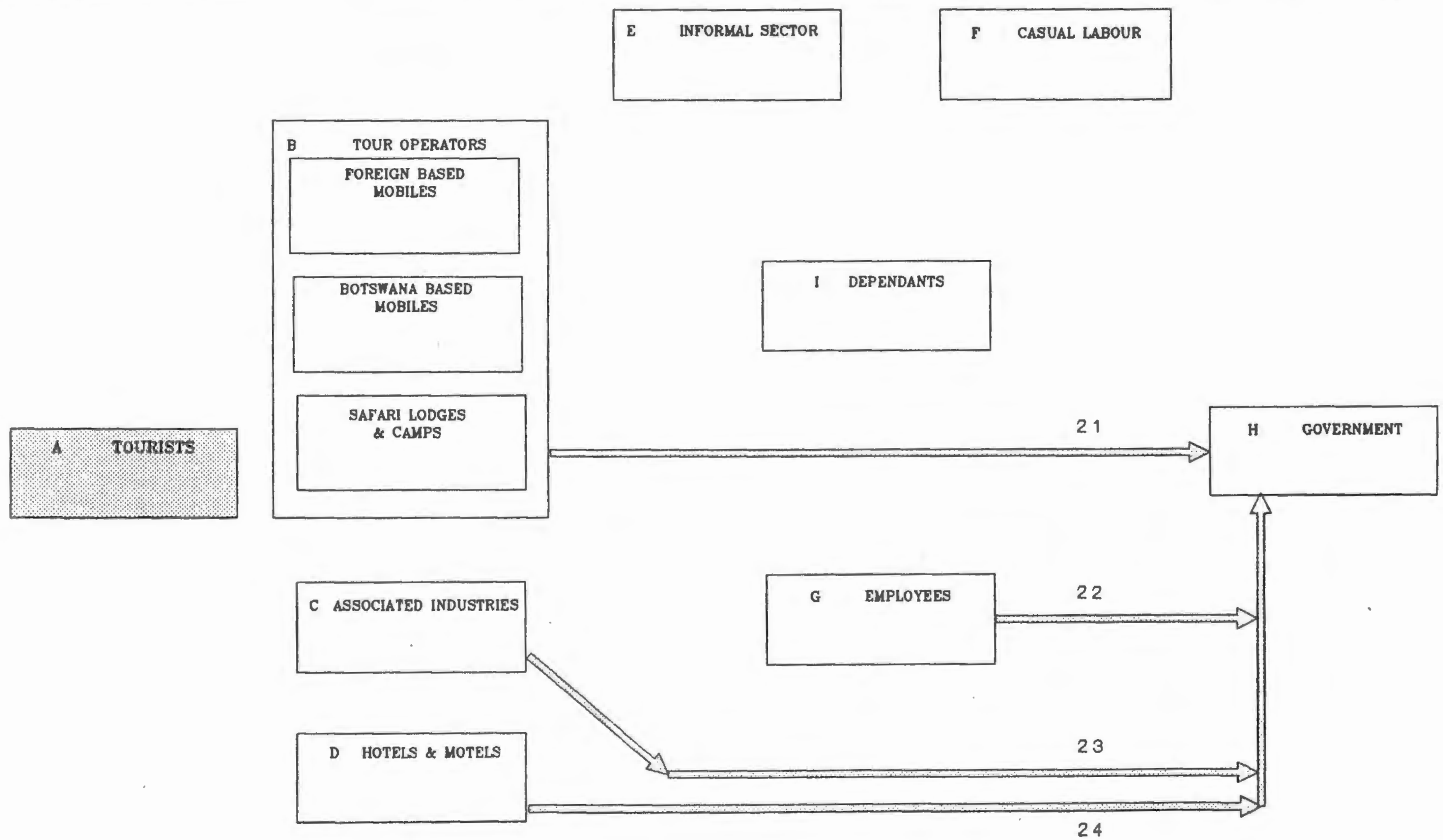
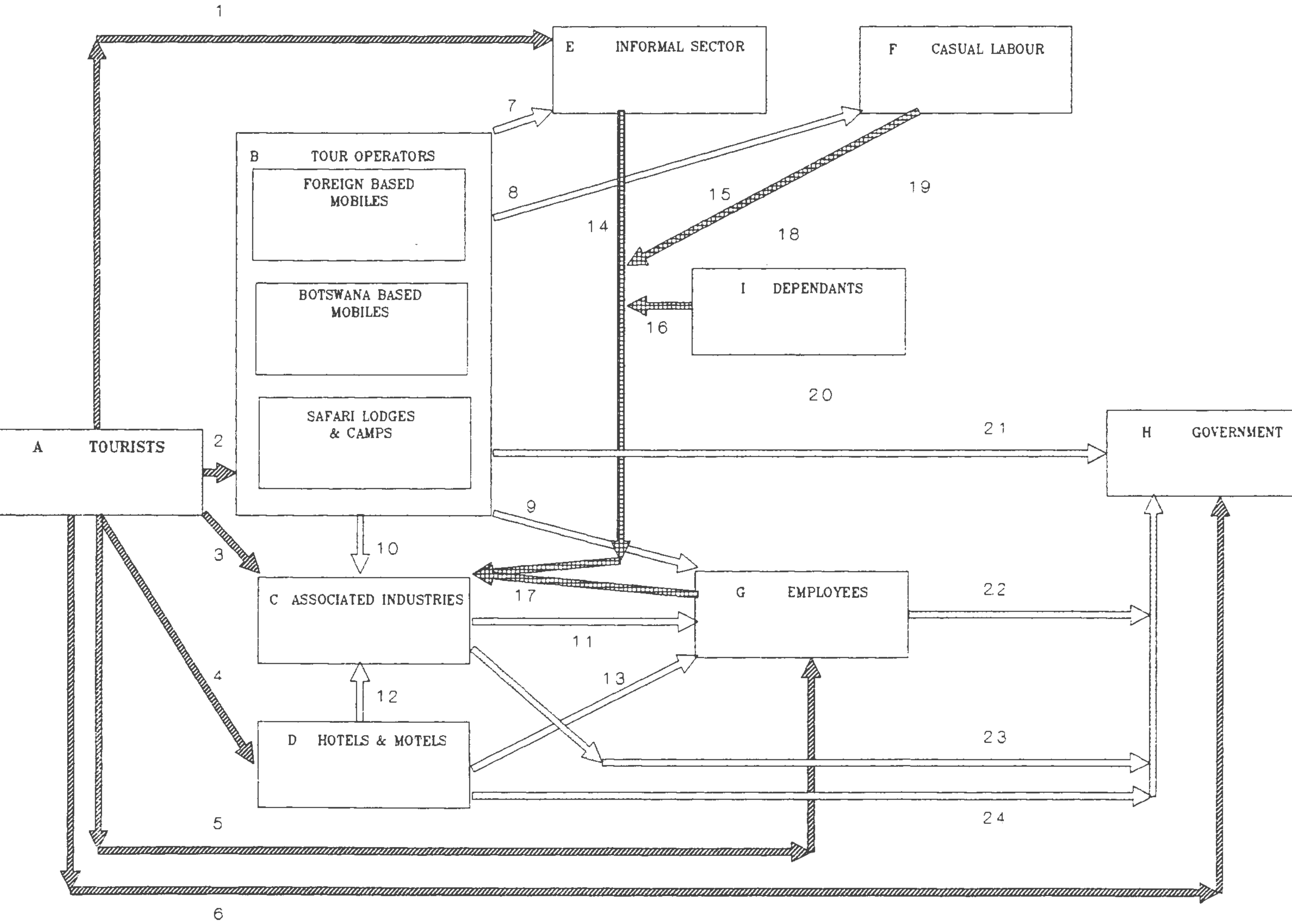


Exhibit 3.
Model of flow of tourist expenditure within Botswana.
3.6. Composite of all flows.



4.3. Deciding upon data needs.

As outlined in Chapter 1, the primary activities that were seen as being of value to government, and which therefore formed a key area for this study, were:

a) the creation of employment opportunities; and

b) the stimulation of foreign exchange earnings;

In addition the research sought to identify:

c) the contribution to the capital infrastructure of the country; and

d) the stimulation of economic activity and cash flow.

The study did not attempt to measure leakages to surrounding economies.

Having identified the participants in the model, and against the background of the key areas identified under a) and b) above, flows were plotted between each sector and an evaluation was made of:

1. the type of data that would be required to test the flows;
2. the methods that were available and those that were best suited for collection of that data; and
3. how the data should be collected.

4.4. Development of questionnaires.

It was clear that the bulk of the data would be in a quantitative form. It had been shown that no reliance could be placed upon data published by government. It was therefore decided that a questionnaire was required that would permit the collection of raw data specific to the problem being studied. It was anticipated that the response to postal dissemination of such a questionnaire, given the type of confidential data that was being requested, would not be satisfactory. Given this, a programme of direct collection from participants in each sector was seen as being necessary.

Because of the nature of the data and its confidentiality from the point of view of the interviewees, it was decided that interviews should be on a personal basis with representatives of the various sectors wherever possible. The questionnaires were therefore primarily designed as a guide for interviewers but were structured to enable them to stand alone should it be necessary to ask interviewees to complete them without assistance.

A questionnaire for use with tour operators was developed and tested with selected operators. On the basis of this test the questionnaire was modified to the form shown in Appendix A. The test was insufficiently broad in its base, however, and in the field it was found that, whilst it was very useful for those operators who operated from a fixed base in Botswana or were Botswana based mobile operators it was far too comprehensive for companies operating from outside the country and completion became irksome. A less detailed questionnaire was therefore developed for use with mobile operators. (Appendix B).

Similarly, practical fieldwork showed that hotels attributed very little of their income to ecotourism and a very simple questionnaire was all that was required (Appendix C).

A totally different form of questionnaire was needed to attempt to track the spending of ecotourists and three were developed, one for clients of mobile operators, one for totally independent travellers and one for members of the four wheel drive club (Appendices D, E and F respectively). A different form of questionnaire was also developed to structure data collection from suppliers to the ecotourist trade, the sector referred to as the associated industries (Appendix G).

4.5. Structure of the study.

Having identified the persons to be interviewed the structure of the study was then considered. As many interviews would be with Batswana it was essential that a Setswana speaking person should be an integral part of the study and it was felt preferable that this person should be a black Motswana. Together with the author, the study was undertaken by Ms Sandra Bayne B.Sc.(Hons) GCSE, M.Sc. and Mrs Lally Warren SRN, CNA. Mrs Warren is a Motswana and conducted all interviews with Setswana speaking persons. She was Vice President of the Botswana Nursing Council and had conducted many interviews as head of the clinic of the Botswana Meat Commission.

The study was planned in four broad phases:

Phase 1. Background design and study of previous work

Phase 2. Questionnaire testing and review

Phase 3. Data collection

Phase 4. Data evaluation and presentation.

Phase 1 was undertaken between July 1983 and February 1984. Phase 2 took place during the period March to June 1984. Phase 3, the main data collection, followed between July and November 1984. Additional data were collected during 1985 and the first half of 1986. Phase 4 commenced during the data collection period and continued to June 1986.

4.6. Number of interviews.

Wherever possible interviews were on a "face to face" basis. Where this could not be achieved, written or telephonic communication was used.

Interviews were undertaken, or questionnaires received from:

56 Tour operators

14 Hotel or Motel managers

73 Representatives of Associated Industries

177 Employees of companies

62 Participants in the informal sector

18 Government or para statal employees

295 Independent ecotourists

During the collection of the data for this report lengthy discussions were held with many persons involved with, or interested in, the tourist industry in Botswana. The informal comments and opinions do not correctly form a part of an economic evaluation as contained in this study but were, nevertheless, of considerable value in providing background to the industry as a whole.

Discussions were also held with officials of the Office of the President, the Ministry of Commerce and Industry, the Department of Wildlife and National Parks, the Tourism Department, Air Botswana, the Botswana Development Corporation and the Central Statistics Office.

Wherever there was doubt about the data available a conservative attitude was always adopted, thus, the figures given will be understated rather than overstated.(NB. figures in the report have been rounded to the nearest P100).

4.7. Interviewing of tour operators.

To gain support for the study, letters were sent to registered tour-operators by both the Kalahari Conservation Society (KCS) and the Hotel and Tourism Association of Botswana (HATAB) asking for operator assistance in the study. Prior to commencing the collection of data it was also necessary to spend time with each person to establish a level of personal credibility and to satisfy operators that confidential data would be respected.

The time required for interviews varied dependent on the complexity of the particular operation, as operators offer three basic forms of accommodation:

1. Those who run permanent fixed lodges or camps offering accommodation only to clients who have made prior booking arrangements. Such operators may, or may not operate mobile safaris.

2. Those who run a "Hotel" type of fixed establishment offering accommodation or camping facilities to casual visitors without prior booking. They may, or may not operate a camp site and/or mobile safaris.
3. Those who run a mobile safari operation only, utilising accommodation facilities through operators above or who establish their own independent camp sites.

All the operators in the first two groups were interviewed and, with one exception, all were companies registered in Botswana. Interviews took from four to five hours per operator.

Those in the third group, the mobile operators, also fall into three categories:

1. Those who were registered in Botswana and based in Botswana
2. Those who were registered in Botswana but based elsewhere
3. Those who were not registered in Botswana and were based elsewhere.

As many as possible of these companies/individuals were interviewed but, given the nature of their operations, particularly those in the last category, it was not possible to interview all those involved.

Interviews with mobile operators took less time than those with fixed camps. Less time was required to interview Botswana registered companies where staff were employed in Botswana, than those companies who merely travelled through Botswana. Interview time for Botswana based mobiles ranged from two to three hours and one to two hours for visiting mobiles. Appendix H indicates which operators were interviewed.

4.8. Interviewing associated industries.

Associated Industries were identified from the data given by the Tour Operators or from scanning the telephone directory and local advertising for clearly associated activities, for example, travel agents, car hire, curio shops. A full list of the 77 companies interviewed is contained in Appendix I. Many of the companies were unable to accurately separate sales attributable to ecotourist activities.

In asking people "How much of your business is due to ecotourism?" the study team found that those questioned had difficulty in making an evaluation. When the question was framed differently, "What business would you lose if tourists stopped coming to Botswana?" a far clearer response was given.

To provide a basis for the study, therefore, a simple question was posed:

> "What would be the impact on the economy of Botswana if tourism stopped tomorrow?"

To ascertain the impact upon companies or individuals they were asked:

> "What would be the effect upon you or your business if tourism stopped in Botswana tomorrow: would your business close down?
> If you would not close down, would you reduce staff and, if so, by how many?
> Would your turnover be reduced and, if so, by how much?

Calculated estimates were then made based upon the experience of the interviewee. This experience was realistic as South Africa had recently advised tourists not to visit Botswana, following reaction to cross-border raids into Botswana by the South African Defence Force. Respondents had, therefore, experienced a fluctuation in tourist visitor numbers.

The estimates given by respondents cannot be verified independently. There must also be companies who were reliant upon ecotourist trade to a greater or lesser extent that have not been identified for example, roadside service stations, small cafes, bottle stores. The data therefore contains an unascertainable level of inaccuracy.

4.9. Interviewing informal sector participants.

There are three major groups of persons who have been placed in this category:

1. Handicraft and curio makers/sellers who do not operate from a shop. (Those who do operate from shops have been classified under Associated Industries).
2. Polers of dugouts canoes.
3. Suppliers of building or decorating materials, for example, thatching grass, reeds, timber for building, mabinda mats (mats made of woven reeds).

The problems experienced in interviewing this group are outlined below.

4.10. Sample size.

Interviews or questionnaires were received from:

1. 100% of the identified Botswana based tour operators with fixed camps.
2. 77% of the Botswana based mobile operators.
3. 70% of the identified non-Botswana based tour operators.
4. 59% of the Hotels and Motels. Those who did not respond were in outlying areas and off the main ecotourist routes.

Whilst the total independent ecotourist population cannot be ascertained with a high level of accuracy Roberts estimated that approximately 3 600 independent ecotourists visited the national parks, the main ecotourist destinations in 1984/85. (Roberts, 1985: 30) Thus the 295 responses received from independent ecotourists would constitute an 8% sample of this number.

Mendenhall and Reinmuth have developed a set of techniques and formulae for determining the range of accuracy of data when the size of the population being sampled is not known. Based upon Mendenhall (1978. p594 et seq) the independent ecotourist sample gives a 95% probability that the data is within 5% of the correct result.

The total number of associated industries, that is those who derive benefit from tourism in some form, cannot be identified. The National Accounts of Botswana give a table of known establishments by sector (National Accounts, p114). This shows 6 170 establishments. Of these 445 were classified as agriculture and 40 as mining leaving a total of 5 685 establishments operative in the total economy. Given this size of the Botswana economy it is submitted that the 73 companies interviewed represent a relevant proportion of those who could be expected to be actively involved via tourism.

Again, based upon Mendenthal, this sample presents a 95% probability that the data is within 12% of the correct result even if the total business population of 5 685 companies were involved in tourism. In reality, the number will undoubtedly be smaller.

Similarly, the total number of employees who owe all, or the major part, of their employment to ecotourism cannot be identified. However, given that there were only 16 600 formal sector posts in the trade/hotel sector of the economy (National Accounts supplement) then the 177 employees interviewed are a reasonable sample from this sector as is the sample of 62 persons from the informal sector.

4.11. Authority to study.

Research undertaken in Botswana must be authorised by the Office of the President of Botswana. Authority was obtained for this study. This was further supported by a letter from the Director of Wildlife and National Parks authorising access to the park entry records of the Department.

4.12. Compilation of report.

All numerical data collected from tour operators was recorded upon a LOTUS 1-2-3 Spreadsheet using an IBM Personal Computer. The Lotus programme facilities were then used for groupings and calculations of data presented. The full spreadsheet is presented in Appendix J. The thesis was written using the

Multimate Word processing package on an IBM PC whilst some graphs and tables were prepared using Harvard Presentation Graphics on an HP 150 computer graphics plotter.

4.13. Assumptions made prior to the study.

Certain assumptions were made and problems anticipated in the research programme. It was assumed that:

1. tour operating companies would be prepared to divulge financial data on their companies and that tourists would be prepared to co-operate in completing questionnaires.

2. the gate records of the Department of Wildlife and National Parks would:
   - a) be made available by the Department.
   - b) be legible.
   - c) be complete.

Problems were expected in that:

1. Tourists and companies involved would not be 100% accurate in their statements of spending/income. Data could therefore be distorted.
2. Employees/informal sector participants would understate earnings/income for fear of Government tax collectors becoming aware of the data.
3. Because of the erratic nature of the timetables of some tour operators, not all operators would be identified, or if identified, would not be interviewed.
4. Because of the confidentiality of financial data being asked from the companies, and its potential value to competitors, global figures might have to be presented to protect participant's interests.

4.14. Difficulties due to the confidentiality of data.

When the study was undertaken it was agreed with company representatives that data collected from individual companies would be totally confidential. Much of the information given, if made public, could have permitted commercial exploitation by competitors. Despite this assurance of confidentiality some companies declined to divulge certain categories of information. Thus certain figures are understated.

4.15. Problems in measuring operators' funds

There are three potential sources of information as to the funds that are contributed by tour operators:

1. Potential earnings i.e. what the operator could be earning if he sold every client/day that was occupied at the full price charged per day.
2. Stated earnings (income) i.e. what the operator says he has earned within or brought into the country.

3. Expenditure i.e. those amounts that have been used to acquire goods or services within Botswana (NB Expenditure outside Botswana was not considered except where it is used to promote Botswana as an ecotourist destination).

Throughout the study potential earnings were ignored and stated earnings and expenditure were used as the basis of calculation.

As the study is concerned with an evaluation of the contribution of the ecotourist industry to the economy of Botswana, it did not explore tour operator profits per se, nor how much income operators earn outside the country. It measured only those flows generated within Botswana that added value to the economy of the country.

4.16. Establishing the numbers of ecotourists.

It is not possible, from the records available in Botswana, to identify the total number of persons who would fall within the definition of "ecotourist". For example persons who travel to the country on business, and state this as the purpose of their visit on immigration forms, may well take advantage of their visit to travel to a wildlife area over a weekend and thus, during that time, become a holidaymaker. Similarly there will be a leisure component amongst those classified as "day visitors".

Whilst the Department of Immigration shows "Holidaymakers" as a category of persons passing through the border posts it is not felt that this grouping necessarily gives the total picture of the number of ecotourists, given the aspects mentioned above. It does however provide a base from which some estimates can be made.

The main ecotourist attraction in Botswana is its wildlife areas. (Dixon, personal communication, 1984). It is not possible to identify the exact number of persons who visit all the National Parks and Game Reserves (see Chapter 3) Whilst an evaluation of the gate records that do exist gave an assessment of some 20 000 visitors during 1984 (Ingram 1986:6), this may be contrasted with the 45 600 persons who stated that they came to the country on holiday (Statistics Bulletin 10.1. Table 29).

4.17. Identifying foreign exchange earnings.

Ecotourists fall into five main categories:

1. Those who visit the country as part of an organised tour activity.
2. Those who visit the country utilising their own resources. (These persons may participate in organised tour activities whilst in the country).
3. Those who visit the country on business, or whilst visiting relatives or friends and take the opportunity to use tourist facilities.
4. Those who are expatriate residents within the country and tour within Botswana.
5. those who are citizens or permanent residents of Botswana.

Categories 1 to 3 will generate foreign exchange for the country, in that the tourists will pay for their holidays in the currency of their home countries. But those who form category 4, expatriate residents in the country are spending money earned within Botswana. Ordinarily the surplus of these earnings, after covering costs of daily living, would be exported to the expatriates' country of origin at the end of the contract period. By generating expenditure on tourism additional income was earned in Botswana in that foreign exchange transfers out of the country are avoided. Accurately identifying the expenditure of this category is not possible.

Similarly, citizens or permanent residents of the country, spending leisure time touring, are spending money earned in the country. These earnings do not constitute foreign exchange income nor are they likely to leave the country. Again, accurately identifying expenditure of these people is not possible.

4.18. Establishing the size of the informal sector

Because participants in the informal sector act independently, taking advantage of demand at the time that it occurs, it is impossible to identify how many persons in total were actively engaged in this sector. There were indications that some people had switched to craft-making as a result of the current drought and the impact upon their subsistence farming activities. This will also influence the size of the sector. Whilst interviews were conducted with as many persons as were seen, there is no way of evaluating the size of the total population at any given point in time.

The income accruing to this group from the Tour operators has however, been identified. Roberts made an attempt to quantify the income accruing to this sector from the independent tourist or the tourist who, whilst travelling with a tour operator, made purchases during his "free" time. (Roberts, 1985). Reference has been made to this work in some of the calculations.

4.19. Determining expenditure by ecotourists.

The reports of the Central Statistics Office give a broad breakdown of arrivals to the country, identifying persons visiting the country on "holiday" as one of several categories. All the categories of the departing visitors are, however, grouped together in one total, as are records of their expenditure. Thus Table 29 of the Statistical Bulletin Volume 10, No. 1 (Central Statistics Office, 1985: 40) gives a total of 67 600 persons who stated that they visited the country on "holiday" from November, 1983 to October, 1984. Table 30, of the same publication, indicates 311 700 "visitors" leaving the country during the same period, having spent P40 156 000.

If one takes the ratio of "visitors" to "holidaymakers" (311 700/67 600) and applies this same ratio to the total expenditure figure of P40 311 700 then one derives the figure of P8 742 600 as expenditure attributable to holidaymakers.

This would represent the amount spent within Botswana and excludes amounts paid outside the country for pre-booked tours/safaris etc., which may be brought in to the country by tour operators.

It might also be anticipated that holidaymakers would tend to spend more, on average, than those on business or in transit. As previously mentioned this does not take into account expenditure by day visitors or business people who take a "holiday" break over a week-end. But this calculation can only give a very rough guide to actual expenditure.

To create a more accurate data base and to obtain a representative sample of independent tourist expenditure (i.e. that of persons travelling and using their own resources and not those of organised tours) two questionnaires were developed for use in a follow up study, Appendices K and L. Two hundred and forty eight of these questionnaires were completed. Responses were obtained from both personal interviews and a mailing to persons whose names were recorded in DWNP gate records.

4.20. Analysing Department of Wildlife and National Parks records.

The Department of Wildlife and National Parks (DWNP) maintain control points at only certain of the main entry points to some of the main National Parks. Accurate data on visitors to all National Parks is not, therefore, available. Had this information been available it would have been a useful guide in establishing potential totals of ecotourists.

Data from all park entrances where records were kept has, however, been recorded for the period under study by Ingram and Roberts (Ingram, B. & Roberts, M., 1985). The information from the tour operators and independent tourists suggests that few ecotourists visit parks where controls were not maintained because of the poor condition of the roads and a lack of facilities. However, because of gaps in the records the derived figures the probability exists that the true position will be understated.

Summary

This chapter has outlined the development of a model of the components of the ecotourist industry and a model of the potential flows of ecotourist spending within the economy. From these models the various sectors comprising the ecotourist industry were identified as were "node" points where flows of funds could be measured.

It was concluded that data were best collected from representatives of these sectors by means of personal interviews, given the confidential nature of some of the data which was being asked. Interviews and questionnaire compilation was undertaken primarily during the latter half of 1984. The number of questionnaires completed and sample sizes are presented.

The accuracy of the data obtained in this field study was affected by several factors. These included concern over confidentiality of trading data leading to some companies withholding information; problems in identifying tour operator earnings; establishing the numbers and expenditure of independent tourists; establishing the size of the various sectors of the industry and finally, the lack of full data on the use of the main ecotourist attractions, the National Parks.

PART 2

RESULTS OF THE STUDY

The data collection for this study was undertaken between July 1984 and May 1985. This part presents the outcome of the data collection under:

Chapter 5. Tour operators, Safari Lodges, Hotels and motels.

Chapter 6. Independent ecotourist activity.

Chapter 7. Associated industries

Chapter 8. Employment and employee benefits

Chapter 9. Ecotourism and government

Chapter 10. Subsequent developments in the ecotourist sector

Chapter 11. then presents the conclusions drawn from the data.

CHAPTER 5.

TOUR OPERATORS, SAFARI LODGES, HOTELS AND MOTELS

This chapter presents the contribution and funds flow in the hospitality sector, i.e. the tour operators, safari lodges, hotels and motels. It examines the numbers and types of operators, their sources of income and expenditure and numbers of employees. The localities of the main ecotourist areas are identified and the seasonality of trade established. This seasonality is also traced into other areas of activity.

5.1. Tour operators and safari lodges

For the purposes of this study a tour operator is defined as one who derives the majority of his income by providing facilities for ecotourists but who does not fall within the classification of a safari lodge. A safari lodge is defined as a tourist hospitality facility operated from a permanent base, offering combined accommodation and/or camping facilities to visitors and which is primarily dependent on ecotourism for business.

Sixty seven companies or individuals fitting these definitions were identified and fifty seven were interviewed. A full set of the data collected is presented in Appendix J and a list of Tour Operators and Safari Lodges appears as Appendix H, together with an indication of those interviewed.

There are two basic categories of ecotourist facilities. One is safari lodges or permanent camps and the other mobile safaris.

5.2. Permanent facilities.

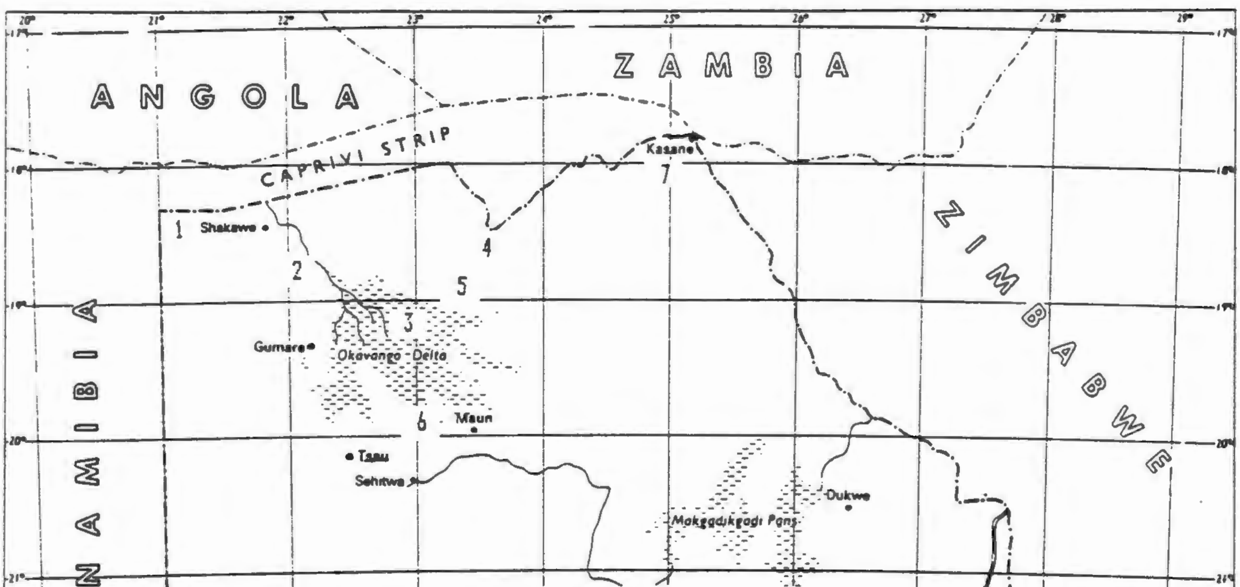
Thirty four companies had safari lodges or permanent camps and operated facilities from a permanent base. The majority of these were in the north-western Districts of the country. (See Exhibit 4).

There can be a further division of these companies into:

1. those providing facilities for the public generally. (14 companies were identified).
2. hunting companies or Safari Outfitters, mainly providing hunting safaris but not exclusively so. (8 companies were identified).
3. those providing facilities for pre-booked clients only. (12 companies were identified).

Owners of permanent facilities may, in addition, offer mobile safari facilities.

Exhibit 4. Map showing location of tour operator facilities in the North Western Districts in 1984.



Key to numbers on Exhibit 4

1. Okavango Fishing Safaris
2. Nxamaseri Fishing Camp
3. Delta Camp
   Camp Moremi
   Camp Okavango
   Gametrackers (2 camps)
   Moremi Safaris
   Ntswi
   Okavango Explorations
   Tsaro
   Xaxaba
4. Linyanti
5. Lloyd's Camp
   Gametrackers(2 camps)
6. Crocodile Camp
   Island Safari Lodge
   Koro Safari Lodge
   Okavango River Lodge
   Riley's Hotel
   Sitatunga Camping Safaris
7. Chobe Chilwero
   Chobe Game Lodge
   Chobe Safari Lodge

All except one of the operators with permanent facilities were Botswana registered companies. This is relevant as these companies were paying Botswana company registration fees and tax and collecting PAYE on employee salaries etc.

5.3. Operators offering mobile safaris.

Thirty three companies fall within the category known within the industry as mobile operators i.e those operating safaris based upon an aircraft, vehicle or boat. Operators move from place to place by driving or flying their clients between either permanent or temporary camp sites. Mobile operators may set up independent camp sites or utilise accommodation or camping facilities offered by others.

These operators can also be divided into three broad groups:

1. operators with companies registered in Botswana and who were based in Botswana. (13 companies were identified);
2. operators with companies registered in Botswana but who have the base of their operations elsewhere. (6 companies were identified); and,
3. operators who do not have companies registered in Botswana but who travel in Botswana. (14 companies were identified. There were undoubtedly others who visited Botswana from time to time who were not identified).

5.4. Income from tour operators and safari lodges

The total income generated within, or brought to Botswana by tour operators in 1984 was not less than P11 112 000. The income generated by the different categories of operators set out in detail in Appendix J.5. Column 8 and shown in Exhibit 5. The figures are based upon the stated income of operators and indicate the relevant contribution of the different sectors.

When evaluating the fact that the companies that were based outside Botswana, categories d. and e., generate P659 000 compared with the P10 452 000 generated by those based inside Botswana it should be borne in mind that the former companies may make only one visit to Botswana in a year, possibly as part of a broader sub-continental tour (see also Exhibit 12, number of trips by mobile operators in 1984).

Exhibit 5. 1984 income by operator type.
N.B. figures are rounded to nearest P1 000

a. Safari Lodges	P 1 986 000
b. Fixed Camps	P 3 697 000
c. Safari Outfitters (Hunting companies)	P 3 980 000
d. Mobile operators, Botswana registered but foreign based	P 502 000
e. Mobile operators, Foreign registered and foreign based	P 157 000
f. Mobile operators, Botswana registered and Botswana based	P 790 000
TOTAL	P11 112 000

5.5. Expenditure by tour operators and safari lodges

An analysis of operator expenditure is given in Exhibit 6. This Exhibit is based upon an analysis of the full data contained in Appendix J. References in brackets refer to the relevant columns in Appendix J.

Operators spent approximately P8,7 million within Botswana in 1984. The difference of P2 412 000 between the declared income of P11,112 million (Exhibit 5) and expenditure of P8,7 million, (Exhibit 6), is not profit, however. The expenditure accounts only for money spent in Botswana and does not include those sums of money which were spent on capital items (e.g. new vehicles, furniture and fittings, building materials etc.) purchased outside Botswana. Nor does it include expenditure by operators outside Botswana which were legitimate costs of running their businesses. For example, P1 213 000 was spent worldwide on promoting Botswana as an ecotourist destination (Appendix J. Columns 9 and 10). In addition, the expenditure does not include the salaries of the owners of the business. The amount spent by operators in Botswana must have represented the absolute minimum being generated by the industry within the country.

Exhibit 6.
Analysis of operator expenditure in 1984.
N.B. Figures are rounded to nearest P1 000
Figures in brackets refer to columns in Appendix J.

	P
PAID TO EMPLOYEES	
Wages and benefits paid to regulars & casuals (26, 28, 29, 32)	3 296 000
Uniforms for staff (30)	35 000
Other staff costs (31)	75 000
PAID TO ASSOCIATED INDUSTRIES	
Food (35, 36)	1 162 000
Liquor (37)	599 000
Fuel and oil (41)	854 000
Vehicle repairs (42)	115 000
Other vehicle costs (43)	152 000
Aircraft fuel (44)	72 000
Aircraft maintenance (45)	61 000
Other aircraft costs (46)	4 000
Printing (48)	19 000
Air charter (49)	584 000
Banking and interest paid (50)	255 000
Accounting and legal services (51)	90 000
Secretarial services (52)	44 000
Insurance (53)	32 000
PAID TO INFORMAL SECTOR	
Handicrafts purchased (55)	73 000
Local products for building (56)	93 000
Makoro hire (58)	88 000
PAID TO GOVERNMENT	
Licences (63, 70, 71, 72, 73)	348 000
3rd party insurance (64)	4 000
Lease costs (65)	258 000
Aircraft landing fees (66)	6 000
Tax (67)	96 000
Park entry fees (68)	175 000
Communications (74)	167 000
TOTAL:	8 757 000

Various aspects of fixed and mobile operators are compared in Exhibit 7, below.

Exhibit 7.
Comparison of fixed and mobile operator activities in 1984
N.B. Pula figures are rounded to nearest P1 000

	FIXED OPERATORS	MOBILE OPERATORS	TOTAL
Total no. of operators:	34	32	66
Botswana registered:	33	19	52
Foreign exchange earnings:	P9 663 000	P1 449 000	P11 112 000
Capital invested:	P19 606 000	P1 455 000	P21 061 000
No. of Batswana employees:	738	36	774
No. of clients:	33 879	3 342	37 221
Paid for makoro hire:	P60 000(1)	P28 000	P88 000
Paid for handicrafts:	P24 000	P49 000(2)	P73 000
Paid to Government (3)	P942 000	P114 000	P1 056 000

Note (1) Two of the 34 companies contributed P54 000 of this total between them.

Note (2) There is a re-purchase factor in this figure in that mobile clients will be buying from fixed operators as well as from curio shops or informal sector sellers.

Note (3) The various categories of payments to Government are set out in Appendix J. 3. Columns 63 to 74.

It should be noted that those fixed camps, hotels and safari lodges which offered facilities to the public derived income from clients brought to Botswana by mobile operators as well as from independent tourists. The mobile operator will hire camping facilities, buy meals etc. from safari lodges or fixed camps on their routes. Without the mobile operators certain types of ecotourists may find it impossible to tour Botswana because of the relatively high accommodation and transport costs in the country.

One can also analyse and compare the contribution of different categories of mobile operators as in Exhibit 8 below. When evaluating the data on mobile operators in this section it should be noted that:

1. all six of the Botswana registered and foreign based companies identified were interviewed;
2. of the thirteen foreign registered and based companies identified full data was obtained from seven; and
3. of the thirteen Botswana registered and based companies ten were interviewed.

The information is incomplete to this degree. The data is understated for the total number of mobile operators as no extrapolations have been made. The data revealed in this exhibit contain a dilemma for those faced with the need to make decisions about the future of the industry:

1. if the objective is to increase foreign exchange earnings then group f. should be promoted. This would also be the case if the stimulation of formal sector employment was the goal.
2. if the stimulation of rural informal sector activity was the desired goal then group d. should be encouraged.
3. if maximisation of government earnings from ecotourism is the goal then groups d. or f. should be encouraged.
4. if however, one compares fixed with mobile operators (Exhibit 7) using the same objectives, then fixed operators dominate in all 3 cases. But then the note regarding fixed operators deriving income from mobile operators must be taken into account.

Separating out, and distinguishing between, the various forms of operator creates a distorted picture. The reality is that operators are interdependent. There is, therefore, a need to maximise the "mix" of returns from all operators. This is particularly important when reconciling possible contradictory activities between hunting and photographic safaris.

Exhibit 8.
Comparison of categories of mobile operators in 1984
N.B. Figures rounded to nearest P100

	GROUP d. BOTS.REGIST'D FOREIGN BASED	GROUP e. FOREIGN BASED AND REGISTERED	GROUP f. BOTS.REGIST'D & BASED
Number of coys.	6	13	13
Foreign exchange contribution:	P502 300	P157 000	P790 000
Batswana employees.	4	0	32
No. of clients	1 599	907	836
Dugout fees paid	P18 100	P8 800	P900
Handicraft purchases.	P27 000	P5 500	P16 700
Government revenue:	P53 300	P9 300	P51 400

5.6. Capital invested

Botswana based tour operators had an estimated P21 million invested in the capital infrastructure of the industry. The owners of fixed establishments also contributed to the opening up of remote areas. In all of the areas indicated on the map, Exhibit 4, tour operators have constructed landing strips for light aircraft and established roads into the areas. All of these constructions contribute to the development of the transport infrastructure of the country.

5.7. Numbers of ecotourists staying with operators

Tour operators and safari lodges had some 37 200 clients in 1984 (Appendix J. Column 14). 17 000 of these booked into accommodation provided by safari lodges, fixed camps or hunting companies. 16 900 used the camping facilities provided by the Safari lodges or fixed camps. 3 300 travelled with mobile operators (See Exhibit 9).

Exhibit 9.
Analysis of numbers of clients in 1984 by operator type
N.B. Numbers rounded to nearest 100

TYPE OF COMPANY	TYPE OF CLIENT		
	PRE-BOOKED TOUR/ACCOM	CASUAL CAMPING	TOTAL
FIXED			
a) Safari lodges	6 000	14 600	20 600
b) Fixed camps	10 600	2 300	12 900
c) Hunters	400	0	400
TOTAL	17 000	16 900	33 900
MOBILES (1)			
d) Botswana registered & foreign based	1 600		
e) Foreign registered & based	900		
f) Botswana registered & based	800		
TOTAL	3 300		

Note(1) Mobile operators will also use the camping facilities offered by safari lodges and fixed camps.

5.8. Countries of origin of tour operator clients

Tour operators were asked the countries of origin of their clients. Some were able to do so with high levels of accuracy. Others were very vague, particularly with reference to casual campers. Despite this, the estimates made by the operators do present a broad picture of the market. (see Exhibits 10 and 11 below, based upon Appendix J.1. Columns 12 to 22). Exhibit 12 indicates the number of trips undertaken by different categories of mobile operators in 1984 (Appendix J.1. Column 23).

Exhibit 10.
Origin of 1984 ecotourists on booked tours, by operator group

TYPE OF COMPANY	COUNTRY OF ORIGIN N. AMERICA	EUROPE	S. AFRICA	OTHER	TOTALS
FIXED.					
a.	490	6 444	12 108	1 587	20 629
b.	3 190	2 406	6 877	402	12 875
c.	316	48	5	9	378
SUB-TOTAL	3 996	8 898	18 990	1 998	33 882
MOBILES.					
d.	233	233	977	157	1 600
e.	0	505	402	0	907
f.	111	293	385	47	836
SUB-TOTAL	344	1 031	1 764	204	3 343
TOTAL	4 340	9 929	207546	2 202	37 225

a = safari lodges
b = fixed camps
c = hunters
d = Botswana registered - foreign based
e = foreign registered and based
f = Botswana registered & based

Exhibit 11.
Origins of clients using permanent camp facilities in 1984

	TOTAL BOOKED TOURS	TOTAL CASUAL CAMPING	TOTAL No. of CLIENTS	% OF TOTAL
North America	3 695	300	3 995	12
Europe	2 846	6 051	8 898	27
South Africa	8 838	10 152	18 990	55
Other	1 615	382	1 998	6
Totals	16 994	16 885	33 879	100

NB WHILST THESE FIGURES LOOK VERY ACCURATE THEY ARE IN FACT BASED UPON ESTIMATES MADE BY TOUR OPERATORS AND AS SUCH ONLY PROVIDE A ROUGH GUIDE TO COUNTRIES OF ORIGIN.

Exhibit 12. Number of trips by mobile operators in 1984	
d. Botswana registered and foreign based	= 169
e. Foreign registered and based	= 63
f. Botswana registered and based	= 78

Comparison of Exhibits 10, 11 and 12 with Exhibits 7 and 8, plus the figures previously presented, give some insights into the values of the various types of company and their markets.

1. Of the 33 800 clients who booked with tour companies offering permanent accommodation, 378 (1.12%) stayed with hunting companies. Yet these clients generated 41% of the total income earned by safari lodges, fixed camps and hunters combined. The bulk of these clients came from North America.
2. South Africa was obviously a major source of clients for all groups except the hunters and the foreign registered mobile operators.
3. The majority of campers came from South Africa (60%). Camping is a cheaper form of holiday than booked accommodation and thus stimulates less cash flow.
4. Foreign based companies in category d. undertake more trips in Botswana than those in category f. Taking into account the fact that only 50% of the companies involved in category e. were interviewed, it seems probable that this group also undertakes more trips than Botswana based companies. This is particularly important in terms of the tax contribution made to the Botswana government. Reference to Exhibit 4 shows the low levels of tax that flow to government from ecotourism. This lack of tax contribution is a major area of government criticism of the tourist industry (Hudson, personal communication and Tourism Policy 1990, p9)

This exceptional contribution of hunting is an important component when policy options are considered. The high cost/low density of hunting makes this an attractive option. However, the secondary benefits of purchases from local entrepreneurs are missing in this market (as shown in Appendix J3, col 55 to 59).

5.9. Growth of the ecotourist industry

Exhibit 13 shows the numbers of companies with permanent camps or safari lodges involved in the industry over a period of 16 years. The exhibit does not indicate the numbers of companies that have opened and closed again over this period of time. It only includes those that were still in operation.

Exhibit 13.
Changes in the numbers of Botswana based operators and owners running fixed camps or safari lodges - 1969 to 1984.

YEAR OPENED	NEW COYS.	NO.OF PRESENT COYS. IN EXISTENCE	CHANGES OF OWNERSHIP
pre-1969	5	5	0
1969	3	8	0
1970	1	9	0
1971	0	9	0
1972	3	12	1
1973	2	14	1
1974	0	14	2
1975	0	14	3
1976	2	16	1
1977	1	17	1
1978	2	19	1
1979	1	20	1
1980	1	21	1
1981	1	22	0
1982	5	27	9
1983	1	28	2
1984	3	31	7
1985	3	34	4

As can be seen from Exhibit 13, in the period from 1982 to 1984 the industry had experienced a period of change and rapid growth. In 1981 there were 22 safari lodges, whilst by 1984 there were thirty one, with 3 more due to open in 1985, an increase of 12 lodges (50%) in only 4 years.

In 1981, Gardner identified 28 safari operators or lodges operating in Botswana (Gardner, 1981). It should be noted that Exhibit 13 gives Botswana based operators only and does not include foreign based mobiles. The Gardner study identified all operators in Botswana. The current study identified 64 operators in 1984 with at least 3 more due to open in 1985, an increase of 36 in four years representing a growth of 129%. This influx of new operators and the changes of ownership that have taken place over the last 3 years can also be seen in the Exhibit 13.

Tour operators were also planning to expand their activities during 1985/6 (see Chapter 11, Subsequent developments and Appendix J. 3 Columns 77 and 78). Given these changes in both the numbers of operators and in the ownership of the companies, plus the purchase of Sun International into Chobe Game Lodge, the changes in ownership and control of hunting companies and the re-sale of Gametrackers, the largest non-hunting safari operator, the industry was clearly at a volatile stage in its development.

5.10. Seasonality

Ecotourist activity, throughout the world, has a seasonal pattern of highs and lows which reflect peak holiday times, the most enjoyable time for weather or some response to a natural cycle (e.g. when the flowers are out in Namaqualand).

The earliest organised ecotourist activities in Botswana were based on hunting and, historically, the safari operating season was determined by three major factors:

1. the hunting season, from mid-March to mid-October;
2. the rainy season which made roads impassable from November to March; and,
3. staff needs for time for ploughing and crop planting during the rains.

With the development of photographic safari operations the constraints of the hunting season became less relevant. Air-strips have removed, to some extent, reliance on road transport for access to fixed camps. There was less reliance on farming activities by employees with the creation of permanent jobs in a formal sector structure for what were previously seasonally employed persons. (Campbell Personal communication, 1984.). This pattern of seasonality is shown in Exhibit 14 which is derived from Appendix M.

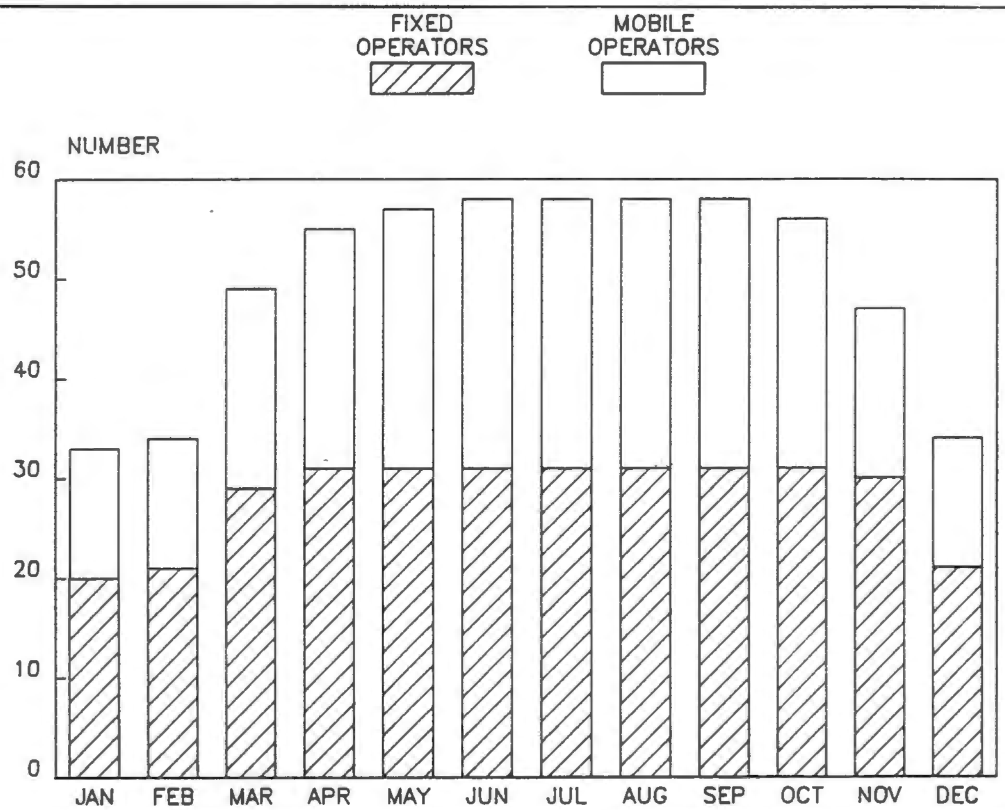
That seasonal pattern has implications for the recipients of funds generated by ecotourist activity. For example, the fixed operators may well be placed in a position where fixed costs exceed income during the off-peak months. Whilst there may be a preliminary purchasing of supplies prior to the opening of the "season", purchasing from associated industries and informal sector participants will fall during that off-peak time.

This seasonal pattern also affects the other major components of the Botswana economy, mining and agriculture. Mining operations and production are adversely affected by the rains which occur from October to February. Road conditions deteriorate badly and mines suffer shutdowns through water related problems. Agricultural income diminishes during the growing season, again associated with the rains.

This concurrence of reduced activety in mining, agriculture and tourism has interest rate implications for the Botswana Reserve Bank (Lieman. A. perscom).

Casual employment will also not be required when camps are quiet although this may be the time when building renovation is undertaken. This renovation will stimulate informal employment in, for example, thatching or building repairs and maintenance. Government income in terms of road tax, landing fees and camping fees will drop but government staff levels may need to be maintained at the various facilities offered.

Exhibit 14.
Numbers of operators active by month in 1984



This seasonal pattern is also reflected in a number of other areas of activity. See Exhibits 15 to 18 below. (NB. The actual values of sales have been removed from the graphs to respect the confidentiality of the information supplied by the companies in the petrol and liquor sales sectors. Nevertheless, the pattern of activity is clearly displayed.) It is of interest to note that from July to October 1983 Maun airport handled more landings than Gaborone (see Exhibit 16).

As can be seen from Exhibits 14 to 18 the peaks of tour operator activity, June to September, coincide with peaks in aircraft landings in Maun, the major tourist airport. They also coincide with peaks in vehicle fuel sales in Maun and Kasane, the main tourist centres. These peaks also coincide with the peaks in holiday maker arrivals as reflected in Statistical Records.

Analysis of Statistical Bulletin Table 29, "number of arrivals by purpose entry" shows a dramatic increase each December in the category "returning resident" and "holiday". It is probable that the peak in beer sales and arrivals in December arises from both tourism activities, which are in turn influenced by Christmas School holidays, and from migrant workers returning for holidays during the festive season.

It is submitted that, given the types of activity presented in the graphs, there is a correlation between the peaks of activity shown in these sectors and ecotourist activity in the country.

Exhibit 15. Vehicle fuel sales by month, by centre - 1983.

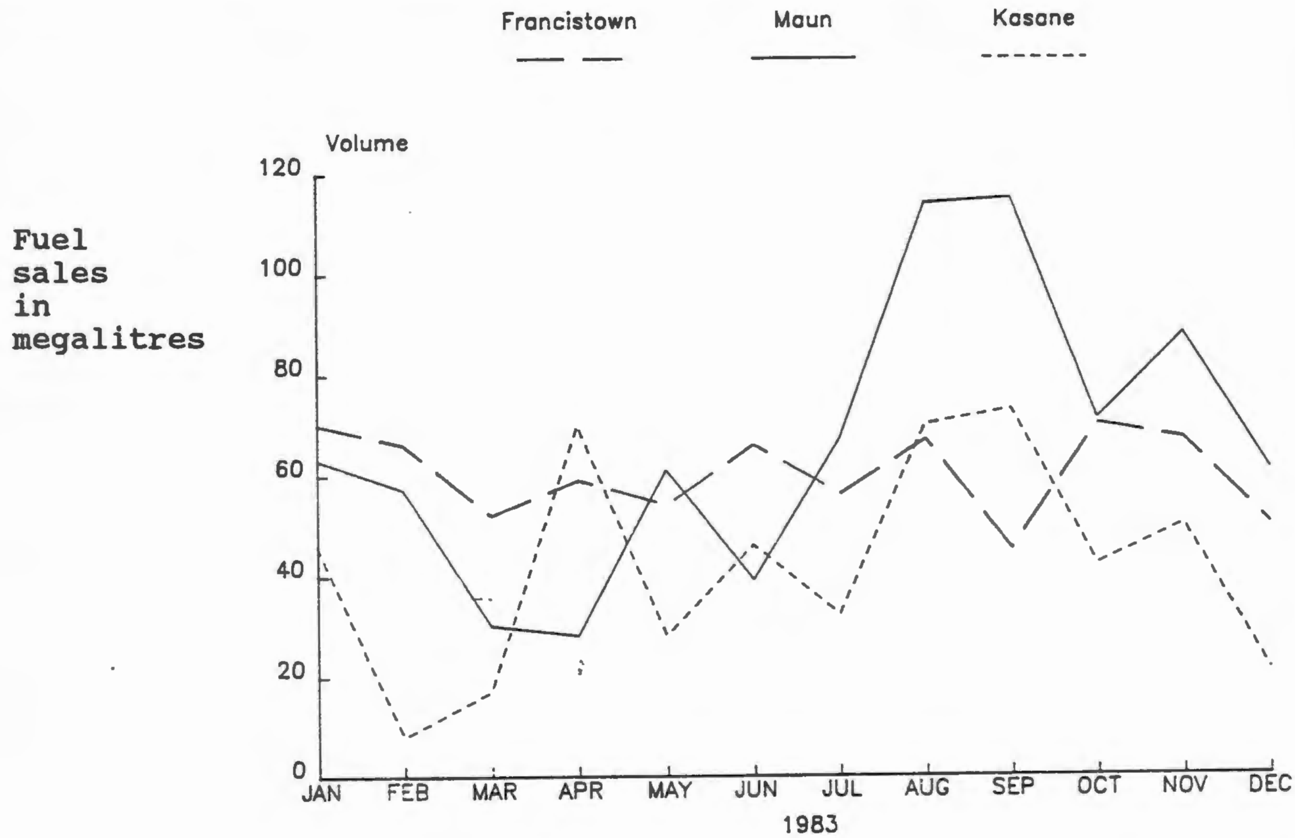


Exhibit 16. Aircraft landings by airport - 1983

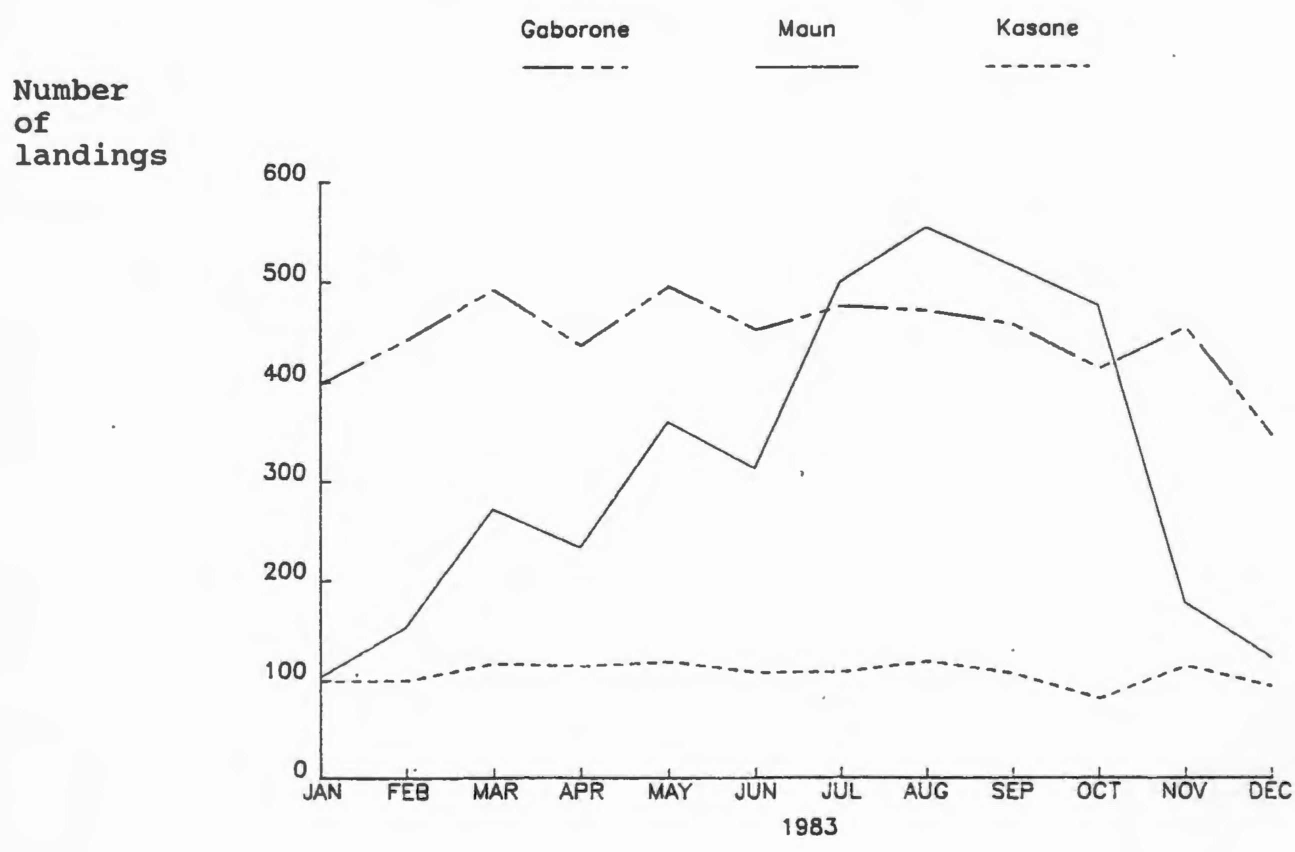
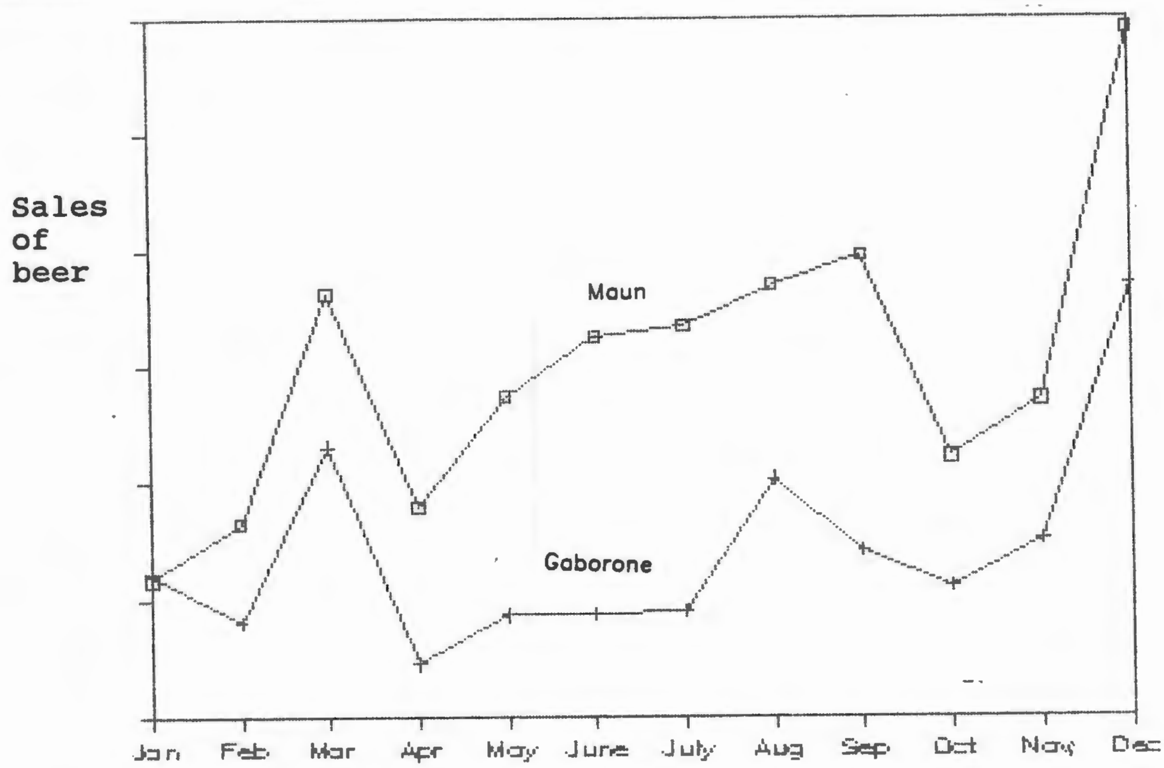
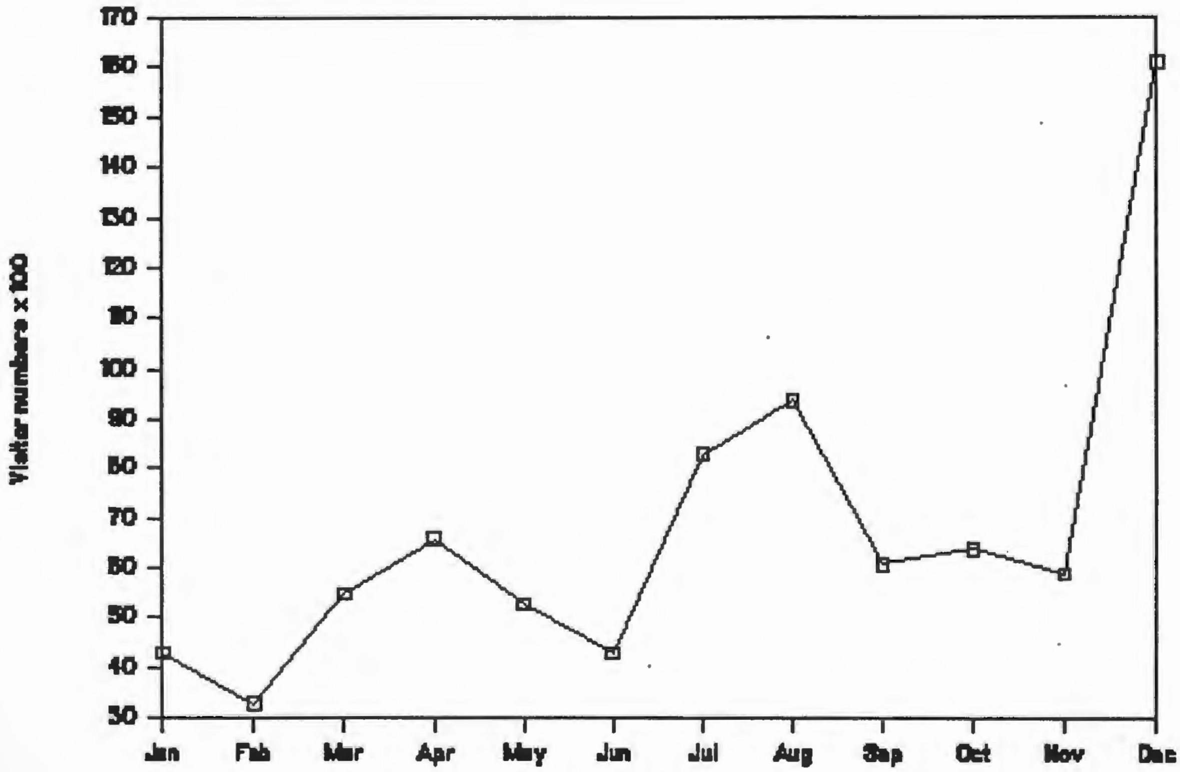


Exhibit 17. Beer sales by month, by centre - 1983



NOTE: Different scales have been used for Maun and Gaborone.

Exhibit 18. Holiday makers by month - 1983



5.11. Occupancy at tourist camps

Accommodation in the permanent establishments of the fixed camps and safari lodges (excluding the hunting companies) was given as:

- Total bed nights available in 1984 191 369.
- Estimated total bed night occupancy 1984 39 684.

Thus the estimated occupancy was 21% of total bed nights available.

These figures suggest that there was an excess of accommodation and an under-utilisation of facilities. The industry is, however, catering for a holiday trade and therefore suffers from a very seasonal utilisation of facilities, as is shown in Exhibit 18. This seasonality reflects holiday times in neighbouring territories, the USA and Europe. It is also affected by Botswana's climate, with many holiday makers avoiding the hot, wet summer months from October to February.

A further factor influencing activity was that many of the companies were run by "one-man operators" where the company closes when these persons take leave or travel overseas on promotional tours. These promotional tours were one of the major sources of clients for safari outfitters and those operators who focus on overseas clientele.

Operators reported that during peak seasons they were unable to cater for the existing demand and whilst utilisation may have been improved by better marketing, they felt there would always be times of low demand and under-utilisation.

5.12. Hotels and Motels

A hotel is defined as premises providing lodging and meals for reward and includes a motel or boatel. (Department of Tourism, 1982). In most countries hotels and motels are identified as the main components of the tourist infrastructure (FEDHASA 1984:6).

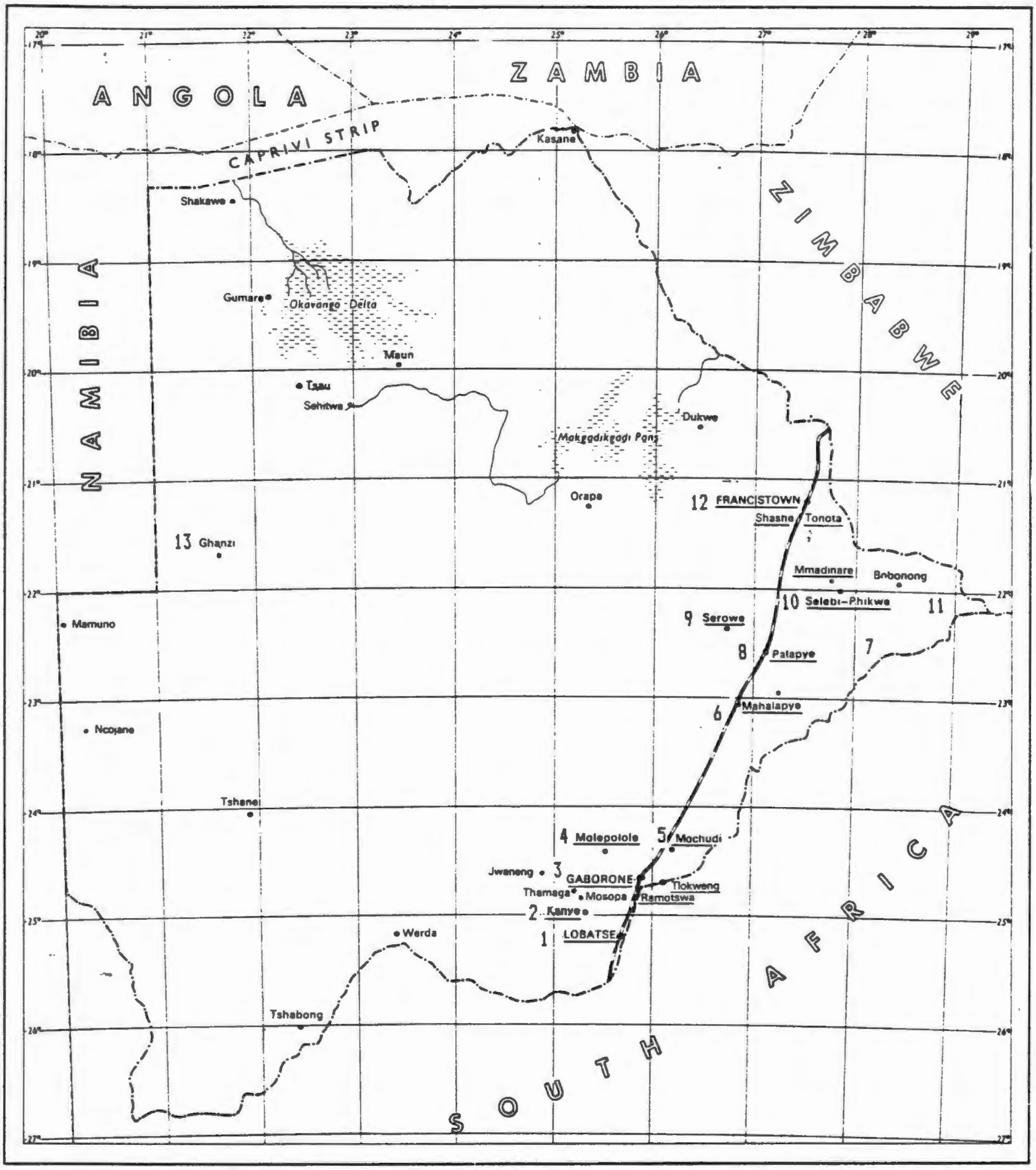
A total of 24 hotels was identified. A full list of these appears as Appendix N. Fourteen hotels responded to questionnaires or were interviewed. The hotels that did not respond were based away from the main urban centres and, given the responses from other hotels, it can be anticipated that ecotourism did not play any significant role in their business (See Exhibits 4 and 19).

Of the 14 hotels that responded, two indicated that ecotourism played no part in their business, and a further eight that ecotourism represented less than 20% of their business. None of the hotels, including those in Maun and Kasane, the main tourist areas, felt that ecotourism contributed any more than 30%, at the most, to their business turnover.

The ecotourist was not, therefore, a major source of income to the majority of hotels in Botswana. The primary sources of hotel revenue was derived from persons travelling on business or local bar trade. Nevertheless, whilst not dependent on ecotourism, hotels employ staff to cater for the ecotourist trade they do enjoy. Overall ecotourism was responsible for 60 jobs in hotels throughout the country and contributed P697 835 in income to hotels.

Exhibit 19 shows the distribution of Hotels and Safari Lodges outside the North Western Districts. (See also Exhibit 4 for details of facilities within the North Western Districts). The regional distribution of ecotourist spending at hotels has been included with the income of associated industries in Exhibit 20 to protect the confidentiality of the data.

Exhibit 19. Map of Hotels, motels and safari lodges, outside the north-western Districts in 1984.



Key to numbers on Exhibit 17

1. Cumberland Hotel
   Lobatse Hotel
2. Kanye Motel
3. Broadway Flats
   Gaborone Hotel
   Gaborone Sun
   Mogo Hotel
   Morningstar Motel
   Oasis Motel
   President Hotel
4. Mafenya-Tlala
5. Motel Sedibelo
6. Mahalapye Hotel
7. Stevenford Safaris
8. Botsalo Hotel
   Palapye Hotel
9. Serowe Hotel
   Tshwaragano Hotel
10. Bosele Hotel
11. Jwala Game Lodge
    Limpopo Inn
    Mashatu Game Lodges
    Tuli Lodge
    Zanzibar Hotel
12. Grand Hotel
    Motel Marang
    Tati Hotel
13. Kalahari Arms

Summary

This chapter has shown that two basic types of tour operators - fixed and mobile - operated in Botswana. It was their activities that provided the basic infrastructure for ecotourists. Hotels and Motels in Botswana apparently derived little income from ecotourists and were not dependent upon them for their business.

The 67 tour operators identified earned some P11 million in Botswana, had P21 million invested in infrastructure. They employed 870 people on a full time basis, of whom 774 were Batswana. Hotels and Motels attribute P698 000 of their income to tourists and employed 60 people to service this trade.

Expenditure by tour operators within Botswana stood at approximately P8,7 million with fixed operators contributing the bulk of this. P1,2 million was spent worldwide by operators in promoting Botswana as an ecotourist destination.

Ecotourist activity was seasonal peaking from June to September, the cool dry months in Botswana. This seasonality of activity can also be identified in associated areas of the economy, reflecting the impact of the ecotourist trade.

CHAPTER 6.

INDEPENDENT ECOTOURIST ACTIVITY

For the purposes of this study, an independent ecotourist is defined as "one who travels for pleasure, relying upon his own resources, and not as a client in a commercial tour group." This chapter examines the activities of these persons identifying the difficulties in establishing the numbers of these persons and thus in evaluating expenditure by independent travellers.

6.1. Calculating the numbers of independent ecotourists

Following the recommendations of the United Nations, Botswana collects data on persons arriving in the country by purpose of entry based upon the categories of:

Business,
Holiday,
Employment,
In-transit,
Returning resident,
Day visitor, and
Other.

(Appendix Q Table 29 and United Nations, 1968).

Departing visitors were requested to supply details of expenditure during their visits (Dixon, I. Personal communication). This data is captured by the Central Statistics Office and presented as Table 30 in the Statistical Bulletins (Central Statistics Office). Departing visitors were not asked to give a breakdown of the purpose of their visit on their departure. This creates a problem in that expenditure cannot be identified by visitor purpose of entry. It would be anticipated that business visitors or holiday visitors would spend more, for instance, than those in transit but this cannot be verified from statistical data available.

Analysis of the statistical data also raises questions of the accuracy of data when trying to analyse expenditure. The figure presented in Table 29 of the Statistical Bulletin 10.1. March 1985 gives an average expenditure per visitor of P2 207 during an average stay of 4.1 days for February 1984 (Appendix Q). Other months reflected average expenditures in the range P105 to P226 in the same 4-5 day time period. This anomaly could not be explained by the Central Statistics Office (Modise personal communication, 1985).

Another problem arises when trying to match arrivals and departures from the statistical data presented in Statistical Bulletins. In 1983, 750 400 persons were recorded as arriving in Botswana. Of these 447 900 were returning residents, 302 500 were visitors. In the same period 350 400 "departing visitors" left the country i.e. ±50 000 more were registered as leaving than arrived.

6.2. Expenditure by independent ecotourists visiting Parks

To establish levels of spending, independent travellers were asked to complete questionnaires during the 1984 field work. A further study undertaken during 1985 also investigated levels of ecotourist spending. (Roberts & Ingram, 1985). The findings of this latter study showed that the average size of groups of ecotourists visiting National Parks was six persons (Roberts, 1985: 6) and that they spent an average of P108 per group on Park entrance fees (Roberts, 1985: 30).

If total income to the DWNP for park entrance fees was P240 000, (from DWNP records made available) and of this operators paid P175 000 (Exhibit 6) then the balance of P65 000 can be attributed to independent ecotourists. If this amount, P65 000, is divided by P108, the average expenditure per group, as given by Roberts (Roberts, 1985:30) then 600 groups visited the parks. With 6 persons per group (Roberts, 1985:6) this equals ±3 600 visits by independent ecotourists to National parks where gate entry records were kept. Visitors may, of course, visit more than one Park during their time in Botswana.

Roberts says that:

> "31% of the tourists' expenditure will be on fuel, 15% on food, 9% on vehicle hire, boat hire, aircraft flights or hardware goods, 9% on organized trips, 7% on private accommodation (Hotels, Lodges etc) 7% on camping fees, 6% on liquor and 6% on National Park entry fees. The remaining 10% will be spent on hiring dugouts, buying curios from shops and local people and on hiring a guide" (Roberts, 1985: 4 - 5).

This expenditure was concentrated in the north-western districts, as may be expected. It was estimated that, over a nine day period with an average group size of six persons, total group expenditure was P1 342 in 1984. Expenditure per person was P210, with expenditure per person per day averaging P22,82. (Roberts, 1985: 7). From this the total independent ecotourist population is calculated to have contributed some P756 000 to the economy in 1984 (P210 x 3 600 people).

If, as indicated by Roberts, ten percent of the P756 000 spent by the independent ecotourists went to dug-out hire, curios, guide hire etc., then P75 600 passed to the informal sector. Apart from this amount of P75 600, the P756 000 spent by independent ecotourists has not been included in the totals presented elsewhere as it must form part of the cash flow reported by tour-operators, associated industries, hotels etc., Not all of the P756 000 was spent with companies interviewed however, again indicating that figures presented are understated.

6.3. Sources of independent ecotourists visiting Parks

Because the independent ecotourists were reliant upon their own resources, and because public transport was non-existent in the ecotourist areas of Botswana, the independent ecotourists tended to come by road from neighbouring countries.

The 1985 study showed the sources as:

South Africa,	82% of the total		
Europe	8%	Botswana	6%
Namibia	1%	Lesotho	1%
Australia	1%	North America	1%

(Roberts, 1985: 9).

6.4. Seasonality of visits

A concurrent study led by Ingram, clearly reflected the seasonality shown in the tour operator data, with April (the month of Easter), July and August being the peak months and November and February recording the lowest figures. (Ingram, 1985. p9).

6.5. Other independent visitors

If 81 900 people declared themselves as being holiday makers when entering the country (Appendix Q. Table 29) and of these 20 300 were tour operator clients and 3 600 independent visitors to the national parks, then the other 58 000 have not taken advantage of the usual ecotourist amenities. Their use of hotels was accounted for but other activities cannot be tracked. One again questions the accuracy of the statistics presented.

Summary

Accurately assessing the total number of independent ecotourists is not possible on the basis of existing official statistics. The National Parks of Botswana are not fenced. Not all road entry points to National Parks are controlled and there is no control over water ways that flow through Parks. Not all wildlife areas visited by ecotourists fall within Park boundaries.

From data collected from other sources it is calculated that approximately 3 600 independent ecotourists visited Botswana's National Parks during 1984. These ecotourists spent some P750 000 throughout the country during their stay. The peak periods for independent ecotourists visits were in April, July and August.

CHAPTER 7.

ASSOCIATED INDUSTRIES

For the purposes of this study, an associated industry is defined as a commercial or industrial company or retail outlet which does not rely directly upon the tourist trade but which, as part of a broader business activity, provides goods or services to the ecotourist, tour operator, hotels, motels or safari lodges. This chapter presents the results of interviews with representatives of these industries. The method of determining the ecotourist contribution is presented and the results analysed.

7.1. Numbers involved

Interviews were conducted with 73 companies identified as being associated in some way with the provision of goods or services to the ecotourist industry. A list of these companies appears as Appendix I. Whilst this list is by no means complete it does provide a broad cross-section of associated industries.

The interviews were based upon the question

> "What would be the effect upon you or your business if tourism stopped in Botswana tomorrow; would your business close down?"

If the answer to this question was "yes" then it can be assumed that the majority of the business was dependent on tourism. Certain of the trade, which may not be ecotourist based, would be transferred to other establishments offering the same facility but, as a general statement, all jobs and income lost by this closure would represent a loss to the economy.

If the answer was "no" then the companies were asked

> "If you would not close down, would you reduce staff and, if so, by how many?" "Would your turnover be reduced and, if so, by how much?"

These staff reductions and losses in turnover can be attributed to the tourist activity in the country. The information given in this chapter is based upon the responses to these questions.

As would be expected, the degree of dependence upon tourism amongst those interviewed, ranged across the whole spectrum from 0 to 100% as:

1. Twelve companies stated that they were totally dependent on tourism. They gave their tourism turnover as P2 888 400 with 60 employees and 462 dependants being fully supported by tourism;
2. Thirteen companies stated that they employ an extra forty two staff to cater for the tourist trade and earn an extra P2 468 900 in turnover;
3. Thirty three companies stated that they have no extra jobs but they do generate an extra P2 960 900 in turnover because of tourism; and
4. The remaining fifteen companies said that they were not affected by tourist activities.

Amongst these companies tourism generates P8 318 200 in turnover and creates 102 job opportunities. The employees in these jobs support approximately 750 dependants.

As a measure of economic activity in associated industries these figures are by no means complete. Other companies, who were not interviewed, must also derive income from ecotourist activities.

7.2. Geographical distribution of associated industries

In the list of associated industries (Appendix I) an indication is given of the centre in which the company is based. As would be expected the major involvement of associated industries was in those centres closest to the main ecotourist areas, namely Maun and Kasane as is shown in Exhibit 20 below. Nevertheless it is of interest to see the number of companies in Francistown and Gaborone which derive income from activities elsewhere in the country and the value of this income. Not all of this income can be attributed specifically to ecotourism. As there was little other tourist activity in Botswana, however, the major component of the tourism income must be ecotourism based, particularly that in Maun and Kasane.

Exhibit 20.
Regional impact of tourism on hotels and associated industries in 1984
N.B. Figures have been rounded to nearest P1 000

CENTRE		TOTAL INCOME TO HOTELS AND ASS. INDUSTS
		Pula
1.	Western Delta	nil
2.	S.West Delta	nil
3.	Maun	5 847 000
4.	Moremi & Savuti	nil (no coys)
5.	Kasane	1 813 000
6.	Francistown	652 000
7.	Gaborone	480 000
8.	Other Areas.	225 000
	TOTAL	9 016 000

7.3. The multiplier effect

In a tourism study in 1972, Archer defined a multiplier as measuring the relationship between an autonomous injection of capital into an economy and the resultant change in income that occurs. (Archer, 1972. p2) The activity in associated industries does not represent the end impact of ecotourist spending. The associated industries will buy their goods from wholesalers or directly from manufacturers or will import them. The wholesalers in turn would also buy directly from manufacturers or import for their own account (See Exhibit 21). In each of these steps further jobs are required and turnover is generated. In the movement between each step transport will be required, banking services employed etc.

It is the accumulation of all these steps from the ecotourist spending, through the operators, safari lodges and hotels, either directly or via employees, to the associated industries down to wholesalers and manufacturers that creates the multiplier effect in spending. (See also Chapter 11, Conclusions for further discussion of the multiplier effect).

Summary

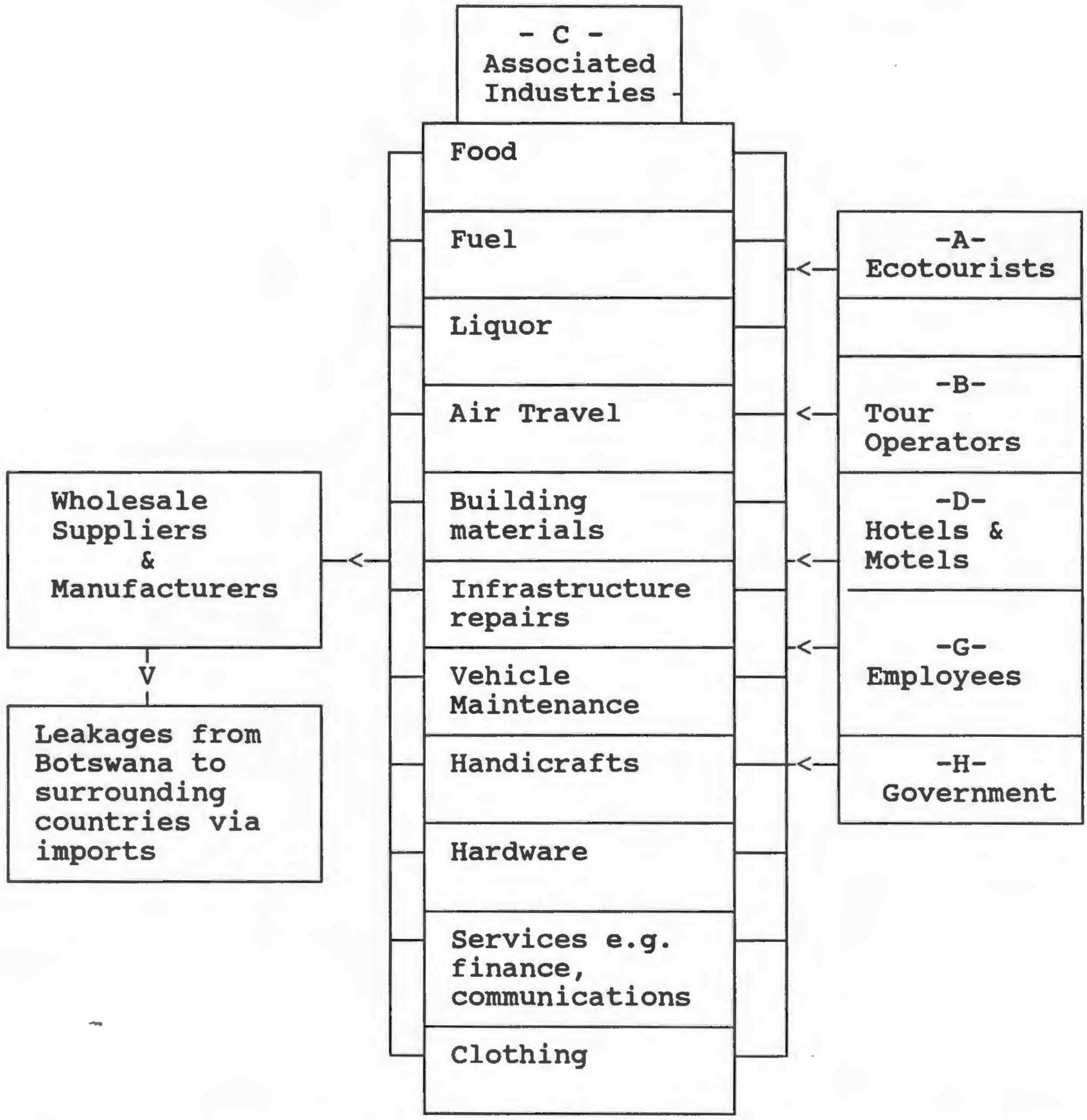
Because of ecotourist activity, a range of companies trade with, or provide services to, ecotourists or tour operators. Whilst the majority of the benefit was derived in the main ecotourist areas of the north-western districts, the impact was felt throughout the economy.

Approximately P8,3 million in business activity was stimulated by tourism creating ±100 formal sector jobs in the companies interviewed. Given the regional location of this activity it is reasonable to assume that the bulk is stimulated by ecotourism.

To provide facilities for ecotourists, operators, lodges and hotels take some of their income to buy supplies, capital goods, purchase services etc., and pay employees. With the wages they earn employees also purchase from the associated industries as does government with the taxes or fees they receive. Ecotourists travelling independently will buy directly from the associated industries along their route. All the associated retail industries will, in turn, buy from wholesalers or manufacturers of the goods involved.

Exhibit 21.

The flow of funds through associated industries.



N.B. letters in boxes refer to equivalent boxes in the flow diagram in Chapter 4.

CHAPTER 8.

EMPLOYMENT AND EMPLOYEE BENEFITS

In a country in which formal sector employment opportunities are limited, job creation is important. This chapter examines the formal sector employment derived from ecotourist activity firstly through tour operators and then through hotels, associated industries and government. A diagrammatic flow of funds to employees is presented (Exhibit 26). Informal sector employment stimulation is then explored and the geographical impact of both analysed.

8.1. Tour operators

In calculating the number of jobs created by the tour operators, the positions occupied by company owners have been ignored as it is not felt that this can be regarded as valid employment creation in government's terms.

Tour operators employed 870 people who received wages, benefits and tips amounting to P3 442 000 in 1984 (Appendix J.1. Columns 24 to 34). Of the 870 persons employed by tour operators 774 were Batswana; a ratio of 8 Batswana to 1 expatriate. Interviews were conducted with 177 Batswana employees of tour operators (representing 23% of the total). They indicated that they supported a total of 1365 persons, an average of 7.7 dependants per person employed. Based upon this figure, 5 960 dependants were supported by the total Batswana labour force of 774 employees.

In addition to the P2 659 000 paid in wages by tour operators.

Food was supplied to the value of	P 406 800
Working clothing/uniforms to the value of	P 34 900
Other Benefits (Medical Aid/Pension etc)	P 75 500

Many employees at camps away from urban centres were given free accommodation and all companies stated that they assisted employees with minor medicines or transport to medical care if they were sick. Frequently the medical care was paid for by the employer.

Approximately 95 600 kg of dried meat, estimated to be worth P190 000, was given free to employees of the hunting companies. Appendix O sets out the calculation of values of meat supplied. This is then reflected in Appendix J.1. Column 32.

Identifiable tips were received to the value of approximately P76 450. It is very difficult to establish with any accuracy the total amount received in tips by employees. It is possible that the above amount, which was estimated by employers, is conservative as interviews with 177 Batswana employees of tour operators revealed an average receipt of tips of P111 per person per annum (P19 604 divided by 177). If this is extrapolated to the total number of Batswana staff, 774 people, then income from tips would be P85 725 (P111 x 774).

Casual labourers employed by those involved in the ecotourist industry were paid P39 900 (Appendix J.1. Column 26).

These expenditures took place in:

Maun/Moremi		P12 900
Western Delta		P21 800
Central Kalahari		P 500
Other Areas		P 4 600
	TOTAL	P39 900

(Appendix J.8. Column 27).

The total number of persons earning casual income could not be ascertained with any level of accuracy.

8.2. The Hotel industry

Hotels, whilst not predominantly dependent on ecotourism, nevertheless employed extra staff to cater for the ecotourist trade. Hotel managers stated that 60 jobs were attributable to tourist activity. No evaluation of the wages earned by these persons was given. However, the 1981/1982 National Accounts indicate a gross compensation for employees in the Trade & Hotel sector of P23,6million (National Accounts, 1981: 33) with 16 600 persons being employed in that sector (National Accounts, 1981: supplementary insert). This is an average income of P1 422 p.a. per person. On this basis, the loss of these jobs would represent a loss of P85 000 income per annum to these persons.

If the number of dependants calculated in section 8.1 above is used as a basis to estimate the number of persons supported by employees in the hotel industry, then 462 persons would have been dependent on the income earned by the 60 employees involved.

8.3. Associated industries

Interviews with the suppliers associated with the provision of goods and services to the ecotourist industry showed that 102 jobs were dependent on the work generated by ecotourist trade. Again, an assessment of the wages earned by these persons on the basis outlined under section 8.2. would yield an earning loss of ±P14 500 per annum to these persons. An estimation of the number of dependants as above, indicates that 785 dependants were supported by the 102 jobs provided.

8.4. Geographical impact

The number of "permanent jobs created" includes all formal sector jobs identified for operators, associated industries and hotels and the figures presented are derived from the place in which employment is contracted (See Exhibit 22). Thus the figure for Maun includes persons employed by hunting companies. The hunting company employees were then posted to outlying camps. These employees come to Maun from all over Botswana and their earnings were re-distributed to their home villages. This re-distribution has not been tracked.

In addition to the number of Batswana employed directly by tour operators, further people were employed in domestic service by persons employed in the operator companies and safari lodges. It is estimated that in Maun a minimum of 60 Batswana were employed in this way. This figure has not been taken into account in Exhibit 22. Given Government's stated aim of rural job creation it is significant that the job creation is occurring in areas away from existing growth points along the line of rail.

Exhibit 22.
Employment creation by geographical centre in 1984.

CENTRE	PERMANENT JOBS CREATED
1. Western Delta	14
2. S.West Delta	58
3. Maun	401
4. Moremi and Savuti	131
5. Kasane-Chobe	292
sub-total	896
6. Francistown	33
7. Gaborone	1
8. Other areas	102
TOTAL	1 032

8.5. **Employment survey statistics**

Based on the information given in Exhibit 22 a comparison can be made with the data derived from the 1983 Employment Survey undertaken by the Central Statistics Office (Employment Survey, 1983: 27).

Table 10 of that survey presents the estimated number of paid employees by location (see Appendix P). The data for the north-western District shows 2 354 persons in paid employment. These figures are broken down to show:

Local government	823 jobs
Transport and Radio communication	50 jobs
Electricity	15 jobs
Total	888

That is, 888 jobs were government or parastatal. The remaining 1 466 (2 354 - 888) jobs would be in the private sector. Comparison with Exhibit 22 shows that 896 of these positions, or 61% of all formal sector employment in the area, were stimulated by ecotourist activity.

8.6. The informal sector

For the purposes of this study, the informal sector is defined as those persons who derive a source of income from ecotourist activities in an unstructured manner, and not as formal wage earners employed by another person. It is the most difficult sector of the economy to evaluate because of the very informality with which it operates.

In a developing country such as Botswana, informal sector employment is important in two ways. Firstly, in the generation of income for families and secondly, perhaps more importantly, informal sector activity can lead to the structuring of new small businesses which then enter the formal economy and contribute to permanent job creation.

8.7. The importance of informal sector income

Four incidents gave insight into the importance of this sector:

1. At Khwai, on the boundary of the Moremi Reserve, a headman made the comment that "my baskets are my cattle". In fact, because of Tsetse fly, he had no livestock and the poor soil only enabled him to grow a few crops. Thus sales of baskets were an important source of income. In a cattle based culture, where cattle represent wealth, his statement is significant.
2. On the main Francistown/Gaborone road a family selling wood carvings stated that "because of the drought we have no other way of making money and without the carvings we would starve or be forced to steal food".
3. In 1984, near the veterinary control point at Dukwe, refugees were seen selling curios over a stretch of several kilometres. These people were not seen during a previous field trip in 1982. If the persons involved had not been making any sales of handicrafts to passing traffic it is unlikely that they would be there in the numbers seen during this study. The handicrafts must be making a contribution to their income.

4. A young girl, about 12 years old, was seen in one town selling bracelets and necklaces made from seeds. When interviewed, she stated that she sold about P40 worth of these items per week during the ecotourist season. She and her brother, (who had a formal sector job) were the only income earners in the family of mother and five children. She did not know the whereabouts of her father.

8.8. The impact of ecotourism on the informal sector

In Botswana ecotourism had stimulated informal sector activity in various ways:

1. directly through spending by ecotourists on handicrafts or dugout hire;
2. indirectly through curia shops and tour operators buying handicrafts for re-sale to ecotourists;
3. through hotels, motels, safari lodges and tour operators building accommodation for clients. In these buildings natural materials such as timber, thatching, reed matting were used and were usually bought locally. In addition, handicrafts such as baskets and carvings were bought for decoration; and
4. by purchases of firewood, meat and fish by operators.

The contribution to remote communities through informal sector activities associated with ecotourism can be quite significant. For example, it is estimated that a minimum of P51 000 was earned in 1984 by dugout polers associated with Xaxaba and Delta camps, whilst P12 500 was paid to villagers in the Kachikau area and P6 200 in Shorobe for the supply of thatching grass or reeds used by tour operators (Appendix J.12.).

A local, non-profit company, Botswanacraft promote basket weaving as a stimulus to rural employment creation. The management of Botswanacraft estimated that they spent P92 000 with the informal sector to supply the demands of ecotourists within Botswana. (Ferren, personal communication, 1984.)

It was found, in what was a preliminary evaluation only, that the type of handicraft produced by the Botswana informal sector was limited to a very narrow range. The major items identified were baskets woven from palm leaves and some wood carving. Bushman artifacts and some crocheted articles were also available. It was striking that local handicrafts formed a very small percentage of the goods for sale in most curia shops.

Zambians and Zimbabweans were seen selling ivory, wood and stone carvings in Kasane and as far afield as Gaborone. In a subjective evaluation it was felt that the quality and value of their handicrafts was generally far higher than those of the Botswana informal sector. The opportunity therefore existed for the stimulation of this sector to provide greater benefit to Batswana.

Mobile operators estimated that clients spent P43 500 on curios bought from both curia shops and directly from rural handicraft makers. Expenditure on the two categories was not differentiated, thus for the purposes of the analysis in Exhibit 21 it has been assumed that, based on the figures given by Roberts (Roberts, 1985:4-5), P4 300, i.e. 10% of the total of P43 000 was spent directly with the informal sector.

Independent ecotourists indicated an expenditure of P75 000 with the informal sector to hire dugouts, buy curios, hire guides etc. Some of this expenditure on curios will be through curia shops included in the totals above but if only 50% of it is passed directly to the participants then a further P37 500 passes to the informal sector.

When these figures are compared with the median annual income of P640 for a household in a small village, (Pember, personal communication, 1985.) ecotourism was clearly a very important contributor to the rural informal sector. Exhibit 24 gives an indication of the geographical distribution of informal sector income.

An estimate of the funds flowing into the informal sector is given in Exhibit 23 which is based upon Appendix J.12. This data was derived from questionnaires received from operators and associated industries, interviews with fifty handicraft makers/sellers and 12 dugout polers together with information from questionnaires from independent travellers. This funds flow is shown in Exhibit 26. The figures given in Exhibit 23 must necessarily be incomplete and are felt to be very conservative. They do, however, give some insight into this sector of the economy. The estimates are:

Exhibit 23
Estimate of flow of funds to the informal sector in 1984 from different activities

1.	handicrafts bought by Botswanacraft, curioshops and operators for resale to ecotourists; or bought directly by ecotourists and independent travellers	P144 900
2.	dugouts hired by operators for clients or directly by independent travellers	P 65 500
3.	local products such as building materials, firewood, meat and fish bought by operators	P 93 000
4.	from independent ecotourists	P 37 500
	The total amount of money identified as going to the informal sector because of ecotourist activity is	P340 900

Exhibit 24
Regional input of ecotourist money to the informal sector

PLACE	H/CRAFTS	DUGOUTS	BUILDING	TOTAL
1. W Delta	2 900	100	31 700	34 700
2. S W Delta	8 500	53 800	2 000	64 300
3. Maun	3 900	9 700	13 000	26 600
4. Moremi-Savuti	7 800	1 900	12 100	21 800
5. Chobe-Kasane	1 000	-	26 500	27 500
6. Kalahari	9 600	-	2 000	11 600
7. Tuli	5 300	-	5 700	11 000
8. Gaborone	9 600	-	-	9 600
9. Other	4 300	-	-	4 300
10. Unidentified				37 500
Sub-totals	52 900	65 500	93 000	248 900
Botswanacraft	92 000			92 000
TOTALS	144 900	65 500	93 000	340 900

8.9. Rural income levels

The Rural Income Distribution Survey of 1976 (Hudson, 1976:12) presents a table of incomes per household based on village size. These are shown in Exhibit 25.

Exhibit 25 Village Household Income				
	Amount per annum in 1975 Pula value			
Location of household	Sources of Income Crops(1)	Livestock (2)	Employment	Trading
Small villages	76	411	258	196
Large villages	140	616	739	806
Note 1. Realised value of crops or livestock sales				

The Central Statistics office estimated that the median income for a household in a small village in 1984, without any persons involved in formal employment or trading, would be P641 per annum i.e. an increase from P487 of 31%. (76 + 411) (Pember, personal communication, 1986). When compared with the estimated rise in the National cost of living between August 1980 and December 1984 this indicates that rural areas were becoming increasingly impoverished. (Appendix Q Table 29).

Against this background, the cash income for the informal sector of ±P341 000 from ecotourist activity was equivalent to the earnings of 531 households in small villages where there is no other source of income apart from crops and livestock. (P341 000/P487).

Summary

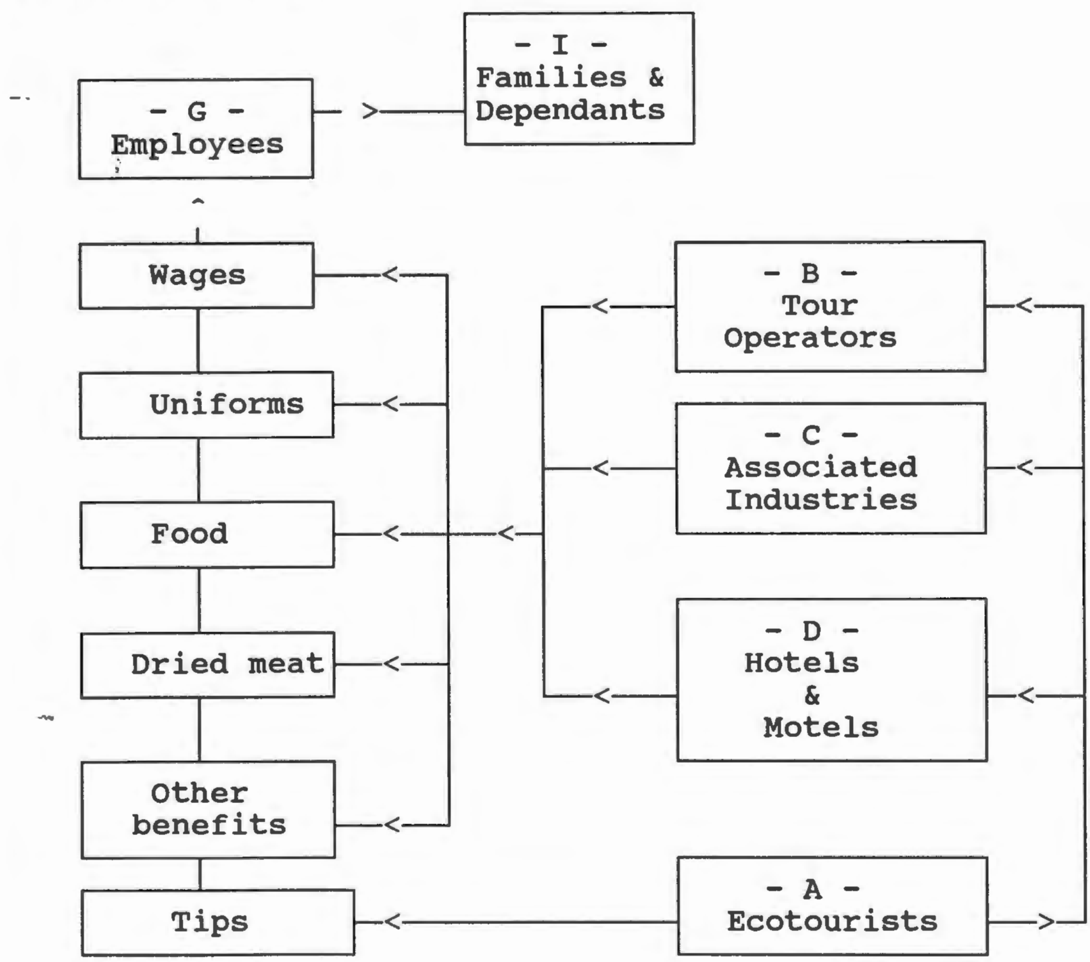
Tour operators, hotels and associated industries employed staff to directly or indirectly, provide facilities for ecotourists. A total number of 1 032 persons owed their jobs to ecotourist activity through this employment. In addition to their basic wages of at least P2 700 000 these persons also received additional benefits worth at least P709 000 and tips of

P85 700. The employment attributable to ecotourism forms 61% of formal sector employment in the north-western districts, an area deficient in other non-government sector employment.

In the informal sector ecotourist activity stimulated a minimum flow of P341 000 to rural communities representing support for the equivalent of 531 households based on average earnings.

Exhibit 26. The flow of ecotourist funds to employees.

From the income they receive from ecotourists, companies employ staff to help provide facilities and service. Ecotourists will also give tips directly to employees or pay informal sector participants directly for their services or goods.



N.B. letters in boxes refer to equivalent boxes in the flow diagram in Chapter 4.

CHAPTER 9.

ECOTOURISM AND GOVERNMENT

Having established the flows of funds to the private sector this chapter examines the flows of funds to, and demands made upon, the Government because of ecotourist activity.

9.1. The flow of funds to Government

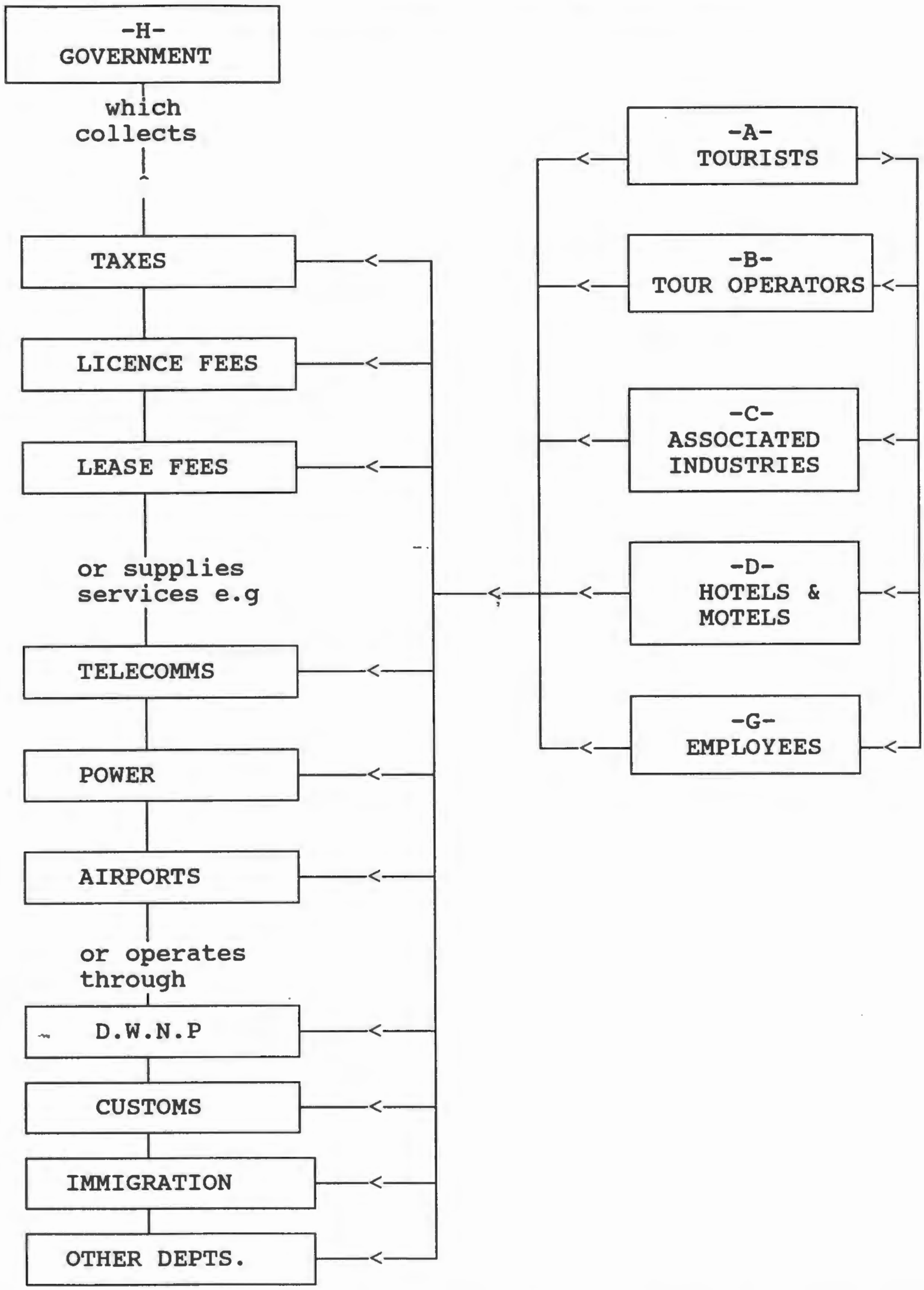
Money flows to both central and local government because of ecotourist activity (See Exhibit 27). Ecotourists spend directly on, for example, entrance fees to Wildlife areas, communications, road tax etc. Then, indirectly, via tour operators, hotels, associated industries and employees some of the money paid by ecotourists also passes to government in the form of taxes and duties.

In 1984 Central and Local Government authorities derived in excess of P1 million, in the form of taxes, licence fees, lease fees, National Park entry fees, use of government services (post, telephones, telex etc) from tour operators. (See Chap.5 Exhibit 6)

In addition to these amounts Government also derived income from excise duties and tax on fuel and liquor sales; personal tax on salaries and wages; road tax on visiting vehicles etc. The total amount of the additional revenue derived in this way from ecotourist activities cannot be determined as these latter figures were not identified by sector at any stage of collection. (Jean-Hanson, personal communication, 1985.)

Government also derived a minimum of 17% of the total Common Customs Revenue, on goods imported for ecotourist use in the Common Customs Area. This was estimated at P56 million for 1983. (Hudson, personal communication, 1985.)

Exhibit 27. Flows of funds to government.



Central and local government receive tourist funds in many ways, both directly from tourists and through others to whom tourists first pay money.

9.2. Local Government income

Lease costs made a significant contribution to the income of certain Land Boards (Appendix J.1. Column 65). The Audit Report and Accounts for the year ending 31st March 1983, for the Tawana Land Board which has jurisdiction over the Moremi Game Reserve and surrounding wildlife areas, indicate a total income of P286 687 of which leases and concessions contributed P121 410 or 42% of the total. (Tawana Land Board, 1984). Over and above this amount there was income from the lease charges for business premises and residential sites for employees of tour operators but, as these figures are not readily accessible, they have not been included in the total. The Director of Local Government auditor commented that leases were "the (Tawana Land) Board's major source of revenue". (Tawana Land Board, 1984. p2).

9.3. Hunting licence fees

In Botswana, there were different hunting licence fees for citizens and non-citizens. Tourist hunters pay substantially more money for each animal hunted. It was estimated by E. Brown that P700 000 was earned by Government from hunting licence fees during 1983 (Brown, 1984: 3). If the 1984 earnings were at the same level then tourist hunters contribute nearly 50% of the total income as hunting companies paid P323 150 in licence fees in 1984 (Appendix J.1. Column 72, line c).

9.4. Government and Air Botswana employment

Government supplies many services to the public which would exist whether there was an ecotourist industry or not. However, because of the extra demand created by ecotourist activity, certain services and staff levels have to be increased above that which would otherwise exist. Identifying those government posts which owe their existence to the ecotourist industry is difficult and a matter of opinion.

Without ecotourism, however, there would be no reason for a Department of Tourism and it is questionable whether the standard of the airport at Maun would have been raised and the airport made an entry point with Customs and Immigration facilities. The full 1984 establishment of the Department of Tourism nationwide, i.e. 13 persons, the Maun based staff of the Departments of Customs and Excise, of Immigration and Air Botswana can therefore be said to owe their posts to ecotourist activity.

Within the Department of Wildlife and National Parks certain field staff positions were necessary because of ecotourist activity but it is probable that these positions would also exist to control internal hunting and wildlife utilisation activities. Thus whilst no posts can be identified as being specifically due to ecotourism, work is created by ecotourist activity.

In the Departments of Immigration and of Customs and Excise, only the posts at Kasane and Maun can be seen as specifically ecotourist oriented. Certain posts elsewhere in Government must handle licence applications, etc., from tour operators. Whether extra staff were employed because of the additional work load is a matter of conjecture.

Government also provided services in the form of communications, roads, electricity, health, air traffic control etc. Ecotourist activity must have some impact on demand for these services, for example because clients come from outside Botswana a great deal of use was made of telex and postal services by tour operators and this activity must be felt by Telecommunications in Maun and Kasane.

During the ecotourist season air traffic at Maun exceeded that at Gaborone (as can be seen from Exhibit 16, Chapter 5). The air traffic control staff and airport staff at Maun must be affected by this.

Government also budgeted expenditure of P9 000 during 1984 for the promotion of ecotourism. Most of this was spent on printing works. (Dixon Personal communication, 1984)

9.5. Tax income

The minimum of international tourism receipts brought to Botswana in 1983 by visitors was P28 714 000 (Statistics bulletin 9.1. Table 4.). Company tax on the profits derived from the turnover of these funds flowed to government. Personal tax on incomes of those employed in ecotourism activities would also have been paid to government, but these figures cannot be identified.

9.6. Foreign exchange earnings

In 1984, Botswana was concerned with its balance of payments and consequently, foreign exchange earnings. In his budget speech for the year 1982/83 the Minister of Finance, Mr P.S. Mmusi, said "this year's budget is prepared against a bleak economic background both internationally and domestically." Mr. Mmusi pointed out that non-oil exporting countries such as Botswana, were in a very serious position. Most of them were dependent on only a few export commodities with falling volume demand and lower prices, at a time when the cost of imports had risen rapidly (Patrick, 1982. Intro). He went on "a deficit in the balance of payments has wide implications for the economy as a whole and there is no single policy measure which can effectively deal with it."

In his 1983/84 budget speech, the Minister re-emphasised this point stressing that "prospects for recovery in world economic activity were pessimistic". The Minister pointed out that Botswana's economy was vulnerable to depression of the diamond and copper-nickel markets, to drought and to foot and mouth disease. (Patrick 1982. update).

The contribution of the tourism industry to foreign exchange earnings is significant. If the three industries mentioned by the Minister are deducted from export earnings then tourism contributes 32.6% of the foreign exchange earnings from Botswana's remaining exports (see Exhibit 1). P875-(616+93+78)= P88 million for exports other than cattle and mining. Tourism contribution P28.7 million on P88 million = 32.6%.

9.7. Leakages from the system

Botswana produces a very small proportion of goods consumed by ecotourists. Other than beef, minerals and locally made handicrafts, virtually all goods purchased in Botswana were imported at some stage, either in raw or made up form. Consequently, as with most other sectors in Botswana economy, the import content of expenditure by ecotourists was high. Thus, whilst funds flow into the country from ecotourists, many were re-spent on imports at some level of the economy.

No study of the leakages of tourism income from Botswana has been compiled. Botswana is, however, comparable with Swaziland where such a study has been undertaken. Both countries are neighbours of South Africa and members of the Customs Union. Both have similar populations, a predominantly mining and agriculture economic base and limited manufacturing ability. Both attract regional tourist traffic.

In a study of the Swazi tourist economy, Crush and Welling (Crush & Welling, 1983) estimate that only 42,8% of tourist derived funds entering Swaziland remained with operators within the country with a further 27,2% being lost via wholesalers. That is, only 30% of the total tourist funds entering the country actually stayed in the country (100-(42,8+27,2)). As suggested, the situations in Botswana and Swaziland are comparable.

Summary

The government of Botswana derived an identifiable minimum of at least P1 million annually from ecotourist activities in 1984. From a local government point of view, ecotourist activity in the north-western districts was particularly important.

Ecotourism also contributed to government objectives of broadening the base of the economy and in rural job creation. The economic activity generated in the country is substantial when compared to the contribution of components of the economy other than mining and agriculture.

CHAPTER 10.

SUBSEQUENT DEVELOPMENTS IN THE ECOTOURIST SECTOR

Against the background of the previous growth in the industry and the level of ecotourism existing in Botswana, this chapter explores operator plans for the future and the government's reaction to the situation.

10.1. Anticipated developments by tour operators

The ecotourist industry was clearly in a time of change and growth (see comments under Chapter 2 and 5 above). Tour Operators were planning to spend P2 890 500 on expansion of their activities in the 18 months from January 1985 to June 1986, creating opportunities for full employment for an additional 344 persons and thus support for approximately a further 2 649 dependants (Appendix J.1. Columns 77 and 78).

Virtually all operators were confident about the future of the industry. The anticipated developments represented a significant further investment of capital and an expansion of employment.

10.2. Potential effects of development

This increased activity would place pressure upon government facilities such as airports, roads, border posts, communications and postal services, national parks.

Unlike other industries ecotourism is subject to external influences far beyond the control of the operators or the government. For example currency fluctuations in foreign countries or acts of violence involving civilians or tourists in Africa generally impact upon tourism in Botswana.

It was felt by some operators that there was a risk that further unplanned development i.e. development which had not been co-ordinated in an overall countrywide plan, could lead to the destruction of the "tourist product" and a collapse of the market. This was particularly the case as word of mouth advertising was clearly identified by operators as being the major source of clients. (See Appendix R, Evaluation of promotional activities).

Some people responding to questionnaires issued to both clients and independent ecotourists (Ingram and Roberts, 1985) and by the Department of Tourism (Dixon, personal communication, 1984) commented unfavourably on various aspects of their holiday in Botswana. Particularly, complaints were made about inadequate and dirty facilities at camp sites in national parks, and about the attitude adopted by officials at border posts. Continuation of this unfavourable reporting would be detrimental to ecotourism in Botswana.

10.3. Potential of ecotourism

Ecotourism is a "non-wasting" industry in that it does not consume the resources that it uses (as does mining for example). With proper care the ecotourism base can continue indefinitely.

Basic ecotourism resources were abundant in Botswana and only a small portion were being exploited. These resources include scenery and landscape, wildlife, historical sites, areas of archaeological and geological interest, the culture and traditions of the Batswana people.

Ecotourism is, however, based upon the "feel" of the experience offered the visitor. There is an upper limit to expansion after which the quality of the product upon which the tourist experience is based becomes diminished. This upper limit, the optimum carrying capacity, is a totally subjective assessment. It is the subject of much debate amongst conservationists and tour operators.

One of the ways of controlling numbers of tourists is through a pricing policy which restricts access whilst retaining income levels. The danger of such a system, if one tier pricing is used, is the exclusion of local people from their own natural heritage.

This can lead to alienation and resentment of the tourist industry (O'Grady, 1980:2).

Two tier pricing, with one price for local residents and another for visitors, can address this concern. It does, however, create problems of control and increases the opportunity for corruption. (O'Grady, 1980:3)

As a comparative base for evaluating Botswana's potential earnings, it was reported that in South Africa in 1984, tourism surpassed agriculture to become the second most important industry after mining. It was expected to earn R750 million in foreign exchange (FEDHASA, 1984: 5). If this level of tourist traffic was reaching the sub-continent then Botswana should be able to exploit the opportunities presented.

10.4. Ecotourism and job creation

Every tour operator interviewed stated that they recruit unskilled persons and train them in camp duties such as maintenance, cooking, driving. When trained these persons then tend to move on to better jobs based on their newly acquired skills. Thus ecotourism, by encouraging on-the-job training creates the opportunity for unskilled persons in rural areas to learn marketable skills.

Ecotourist activities were almost wholly based upon Botswana's wildlife and wildland resources. The ecotourist infrastructure and the associated job creation and expenditure tended, therefore, to be concentrated around the Okavango Delta - Chobe/Kasane area, or in the hunting concession areas. This distribution of job creation complies with government's aim of rural job creation as expressed in National Development Plan 6.

10.5. Social implications

In September, 1980, an International Workshop on Tourism was held in Manila, under the sponsorship of the Christian Conference of Asia (O'Grady, 1980). The Workshop was convened primarily to assess and examine the phenomenon of international tourism particularly from a Third World viewpoint. The Workshop noted that "Tourism has become one of the most important socio-economic activities of our time" (O'Grady, 1980:1). Tourism in Africa has been a source of income for many countries for a number of years and has been generally seen as a means of diversifying the economic base of a country and stimulating foreign exchange earnings. However, increasing ecotourist activities also have social implications for host countries and uncontrolled tourism can cause major social problems and areas of conflict or resentment between the people of the host country and the tourists.

The workshop looked at some of the potential risks in promoting tourism, saying: "cultural forms are particularly vulnerable to tourism experience. Travellers seek "exotic" entertainment, visit unusual sites and collect mementoes. As a result, local art forms are often undermined, dance forms are bastardised or performed out of season, antiques and artifacts are stolen and handicraft standards fall as a result of mass production. The whole cultural pattern changes to conform to the tourism wish and in effect culture is prostituted by an artificial motivation" (O'Grady, 1980:p14).

Commenting on employment, the workshop noted: "the environment and organisation of tourism in the third world is established in such a way as to encourage the worker to expect low wages and depend on tips. This is an unhealthy type of employer-worker relationship and third world countries should try to establish conditions of fair employment in the industry" (O'Grady, 1980:17).

The workshop explored many of the negative impacts of tourism in developing nations but concluded that: "A healthy people -to-people tourism can be a positive factor in opening windows and bringing elevating ideas to societies. In such tourism there is the potential to build harmony and educate the people" (O'Grady, 1980:19).

Conversely, Ziffer argues that "Often times it is not tourism that can be blamed for deleterious effects but poor planning" (Ziffer, 1989:3). Kutay suggests that ecotourism can enhance local cultural integrity and perpetuate traditional values among indigenous people and to educate outsiders about their culture. (Kutay, 1989).

10.6. Government's response

The Botswana government responded to the increasing pressure of ecotourism activities by initiating a tourism development study (Tlusty, 1987). This in turn led to the publication of a government Tourism Policy (Tourism Policy, Government Paper 20/1990). The main objective of the policy is to obtain from the tourism resources of the country, on a sustainable basis, the greatest possible net social and economic benefits for Batswana (Tourism Policy, 1990:14).

Among the subordinate objectives, two stand out:

a) to shift the mix of tourists away from those who are casual campers towards those who occupy relatively permanent accommodation; and
b) to increase substantially the financial returns from tourism to the people of Botswana.

(Tourism Policy, 1990:14).

In the words of Dr. Tlusty, Botswana was opting for a "high cost / low density / long haul market". (Tlusty, personal communication).

It remains to be seen what the impact of the implementation of the Tourism Policy will be. This study provides a base for the evaluation of this impact, providing historical data against which changes can be measured.

Summary

In 1984, tour operators were anticipating a considerable expansion of activities which could lead to increased economic activity and job creation.

Whilst there may be social problems associated with increased tourist activity, Botswana's major ecotourist attractions were in areas of low population density, thus the social impact of ecotourism in the country could be minimised. The opportunity existed to avoid many problems experienced elsewhere.

Increased activity must of necessity involve Government to a greater extent in providing overall guidance for the industry. This was particularly necessary as many operators feared that unplanned growth would lead to the destruction of Botswana's ecotourism product.

The government of Botswana responded to the increasing activity by the adoption of a Tourism Policy designed to reduce endependent camping tourist activity and concentrate on a high cost / low density / long haul tourism based upon greater utilisation of permanent accommodation facilities.

CHAPTER 11.

CONCLUSIONS

This chapter re-states the purpose of the study and concludes that the methodology which has been developed has provided a method of evaluating ecotourist activity in Botswana. This methodology has shown that ecotourism did contribute to foreign exchange earnings and job creation in the Republic of Botswana in 1984. It provides basic data against which future changes can be measured.

11.1. Purpose of the study

The Botswana government had identified tourism as a means of stimulating economic activity. Ecotourism was the tourism sector which was most likely to respond to such a stimulus.

Research in 1982 indicated that ecotourism in Botswana may be a substantial contributor to foreign exchange earnings and job creation. These indications could not, however, be substantiated from the data published by government in the form of national accounts and statistical records.

Studies elsewhere indicated that the system of national accounting and reporting in use in third world countries was based upon that proposed by the United Nations but that this system may not meet the data needs of particular economies.

The hypothesis underlying this study is that ecotourism was making a substantial contribution to the economy of Botswana in 1984 but that this was not reflected because of the statistical and accounting data collection systems in use in the country.

This study tested a methodology developed to permit the collection of meaningful data on the ecotourist sector of the tourist industry in Botswana.

11.2. Conclusion

The methodology developed did permit an evaluation of the contribution of the ecotourist sector to foreign exchange earnings and job creation in Botswana in 1984.

This evaluation showed that ecotourism was making a substantial contribution to the economy of the country, particularly in the North-Western District.

Two basic types of tour operators - fixed and mobile - operated in Botswana. It was their activities that provided the basic infrastructure for ecotourists. Hotels and Motels in Botswana apparently derived little income from ecotourists and were not dependent upon them for their business.

The Botswana Department of Statistics identified P28.7 million flowing into the country as international tourism receipts. The 67 tour operators identified have a net earning of some P11,2 million in Botswana, have P21 million invested in infrastructure and employ 774 people. Hotels and Motels attributed P698 000 of their income to tourists and employed 60 people to service this trade.

Secondary, associated industries had a turnover of P8,3 million which they attributed to tourism. 102 people were employed to serve tourist needs.

Expenditure by tour operators within Botswana stood at approximately P8,5 million with fixed operators contributing the bulk of this. P1,2 million was spent worldwide by operators in promoting Botswana as a ecotourist destination.

Ecotourist activity was seasonal peaking from June to September, the cool dry months in Botswana. This seasonality of activity can also be identified in associated areas of the economy reflecting the impact of the ecotourist trade.

Accurately assessing the total number of independent ecotourists is not possible on the basis of existing official statistics. Other researchers calculated that approximately 3 600 independent ecotourists visited Botswana's National Parks during 1984. These ecotourists spent some P750 000 throughout the country during their stay. The peak periods for independent ecotourists visits were in April, July and August.

Tour operators, hotels and associated industries employ staff to directly or indirectly, provide facilities for ecotourists. A total number of 1 032 persons owed their jobs to ecotourist activity. In addition to their basic wages of at least P2 700 000 these persons also receive additional benefits worth at least P709 000 and tips of P85 700. The north-western districts of Botswana are deficient in non-government sector formal employment. The employment attributable to ecotourism formed 61% of non-government formal sector employment in the north-western districts.

The government of Botswana derived an identifiable minimum of at least P1 million annually from ecotourist activities. Ecotourism also contributed to government objectives of broadening the base of the economy and in rural job creation. The economic activity generated in the country and retained as added value, is estimated as ± P20 million. From a local government point of view, ecotourist activity in the north-western districts was particularly important.

Exhibit 28 sets out the flow of funds through different levels of the economy. Tourists (Box A) spent P11,2 million with tour operators, P65 000 directly with government, P76 500 directly on tips to employees, P75 600 with the informal sector and P3.5 million with associated industries.

Primary spending is therefore ±P15 million.

Tour operators re-spent P3 047 000 on wages, P4 043 000 with associated industries, P254 000 with the informal sector and paid P1 054 000 to government. Associated industries and Hotels re-spent P99 500 on employees. The transactions between Hotels and associated industries cannot be accurately identified but must be approximately P600 000 (P700 000 turnover less P85 000 paid in wages).

Second level spending is therefore ±P9 million

Employees and informal sector participants earned P3,3 million. This would be re-spent in support of themselves and their families. Government would also re-spend the P1,1 million earned.

Third level spending is therefore at least P4,3 million.

The P15 million injection into the economy therefore generated a very conservative further P13,3 million in economic activity in Botswana.

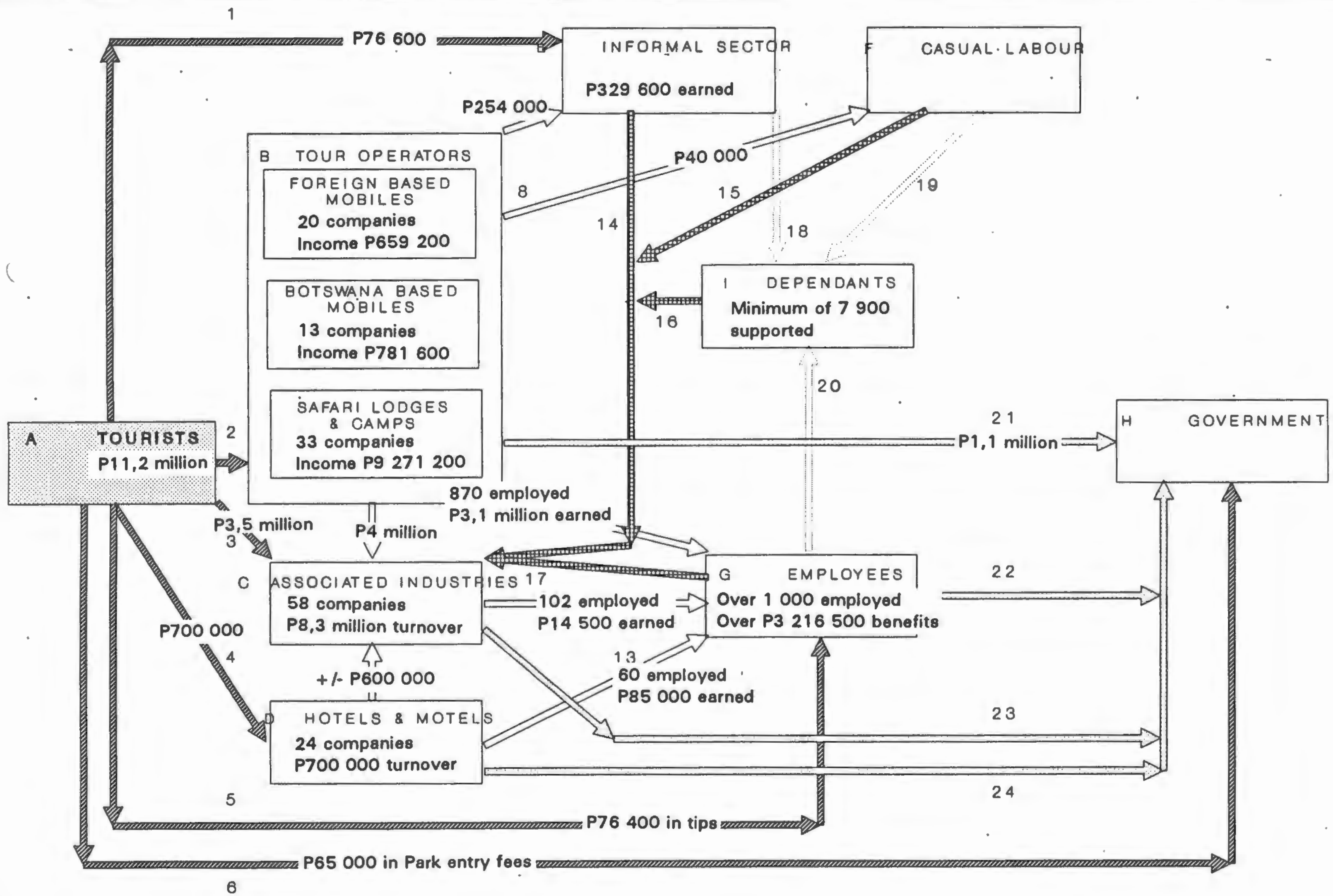
Given the lack of data on for example, re-purchasing by associated industries and hotels from wholesalers or manufacturers; additional flows of funds from government to employees and in provision of infrastructure; levels of employment of domestic workers by tour operator employees; unmeasured secondary business and informal sector activity the figure of P13,3 million has to be an extremely conservative estimate of economic stimulus.

Tourism studies by the South African Tourist Board have used a 4 times multiplier effect to calculate the impact of tourism on the South African economy (FEDHASA, 1984. p4). This multiplier does not appear valid for use in Botswana. From the figures above a multiplier between 1.66 and a conservative 2.09 would appear more accurate for Botswana.

Exhibit 28

Model of flow of tourist expenditure within Botswana.

Transactions at various points on the model



Limits to the accuracy of the methodology used in this study were:

1. When measuring the activities of Botswana based tour operators, safari lodges and hotels and the activities of clients of these components, the level of accuracy is high.
2. When measuring non Botswana based tour operators the methodology is deficient in that all the transit operating companies may not be identified. However sufficient data were collected to allow a meaningful and reasonable extrapolations to be made.
3. When measuring the activities of ecotourists who do not form part of organised tour groups, the numbers and contribution of those visiting national Parks can be ascertained with reasonable accuracy. This is not the case where independent travellers do not use these facilities.
4. Direct funds flow to both central and local government can be established from tour operators and via the records of national park gates where manned by the DWNP. Other fund flows can be shown to exist but cannot be quantified.

The methodology developed has provided a broad data base on the ecotourist industry of Botswana in 1984, which did not previously exist or was not ascertainable from published data.

The field study demonstrated that this methodology varies in its accuracy dependent upon the sector of the ecotourist industry involved. Despite these constraints the supply of goods and services to the ecotourist, both directly and indirectly, can be ascertained to indicate minimum levels of income generation and job creation. Job creation and employee remuneration can be shown to be occurring and a stimulus to the informal sector can be identified. Whilst these factors can be shown to make a significant contribution to local economies they cannot be fully quantified.

The hypothesis is considered proven. Ecotourism made a substantial contribution to the economy of Botswana in 1984.

This contribution was not accurately reflected in government data because of the statistical and accounting data collection systems in use in the country at that time.

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Dixon. I. Senior Tourism Officer, Department of Tourism.

Ferren. M. Managing Director, Botswanacraft, a parastatal body established to promote craft industries.

Hudson, D. Deputy Governor and Statistician, Bank of Botswana.

Jean-Hanson. V. Statistician, Central Statistics Office, Department of Finance, Botswana.

Lieman, A. Economist, School of Economics, University of Cape Town.

Modise, F. Government statistician in charge of the Central Statistics office, Botswana.

APPENDIX A

QUESTIONNAIRE FOR MAJOR TOUR OPERATORS

TOURIST INDUSTRY RESEARCH QUESTIONNAIRE

Please return to:
J Fowkes
c/o Kalahari Conservation Society
P O Box 859
Gaborone

---

1. NAME OF COMPANY:...

2. ADDRESS FOR MAIL...

   ....

   TELEPHONE NUMBER................OR...................

   TELEX..................

3. What is the primary activity of the Company?(Circle)

   Hotel /Motel /Camp based Safaris /Mobile Safaris /

   Camp based /Hunting/Mobile Hunting/Game Lodge/

   Other (please specify)...................................

4. How long has the company been operating:

   in Botswana..............?elsewhere...................?

5. Is the company registered in Botswana?..................

   If "no" where is the parent company based?..............

NAME OF PERSON INTERVIEWED.......................................

POSITION IN COMPANY...

Interviewed by:..............Date:.........Time:...........

The questions in Part 1 of this questionnaire relate to the PRESENT contribution of the Tourist Industry to the economy of the country. Part II addresses problem areas and developments. Answers to this part are optional but your comments would be appreciated.

PART I

6. How much of the business caters for tourists?±.........%

ACCOMODATION

7.1 Does the company have permanent office accomodation?.....

If Yes: ADDRESS..

....

TEL NO:..............TELEX:.................

If in Botswana : Annual Rental:......................

Electricity costs:....................

7.2 Does the company have permanent lodges/camps?...........

If yes please turn to Appendix H

AREAS USED

8.1 If the primary activity is gameviewing safaris or hunting, where are the main areas visited?

1..

2..

3..

4..

8.2 If mobile operations.

What are your starting points, routes & duration of trips:

1..

....

2..

....

3..

....

CAPACITY

9. Is your business seasonal?..............................

If yes, during which months do you operate...............

What do your staff do when you close?.................

10.1 How many bed-nights CAN you accomodate in a season.....

2 How many do you EXPECT to accomodate in a season.......

3 How many bed-nights were filled last season...........

11. Average length of stay of your clients?.........days

12.1 How do your clients hear about you? Advertising.......%

Word of mouth.........% Via travel agents.............%

2 Do you have joint marketing arrangements/affiliations?.

If yes, with whom?..........................

3 Do you undertake personal promotional trips overseas?...

If yes, to which countries................

How much does it cost you annually?..................

4 Do you use an advertising agency?.....................

if yes, where are they based?.........................

how much do you spend annually on advertising,

brochures and promotions each year?+-P................

In which country/countries is the money spent?

1.............&.....% 2..................&.........%

5 What percentage of your business is repeat booking?....%

CLIENT PROFILE

13. From which countries do the bulk of your clients come?

1..&............%

2..&............%

3..&............%

14. What is the average age group of your clients?

under 20/ 21 - 25/ 26 - 30/ 31 - 40/ 41 - 50/ over 50

15. Can you cater for foreign languages?....................

If yes, which languages?...................................

Would you cater for other languages if you could get tour guide licences for ex-patriot interpreters?.............

16. Approximately how many clients do you expect in total this year?....

How many do you expect in the months of

JAN....FEB....MAR....APR....MAY....JUN....

JUL....AUG....SEP....OCT....NOV....DEC....

FEES

17. 1 What is your charge per night per client?P............

2 Is this inclusive of international travel?............

3 If yes, how much pays for international travel?P.......

18. What does your charge cover?...........................

....

19.1 What percentage of the fee from each client is paid in

a) travel agents commissions?........%

b) any other commissions?............%

2 Where is this paid (country)?..........................

20. Where do your clients pay for trips? (show country)

1..........................&...........%

2..........................&...........%

3..........................&...........%

4..........................&...........%

1 What was your total budgeted income from clients fees for 1984?P..........

2 Given the trend this year, how much do you actually expect to receive? P..........

21. How much of the fee will stay to cover costs;

1. In the country of origin? P.........

2 Whilst in transit in Zimbabwe or South Africa?P........

3 How much will be brought into Botswana?P...............

22. How many people are employed by the company in Botswana?

Total....................Non-Batswana.....................

Job title	Is employee		Gross salary p.a	Estimated Food	Annual value of FREE				Based at which camp
	Batswana	Other.			Housing	Uniform	Transport	Other	
	TOTALS;								

23. 1 What is the MINIMUM standard of education required for the LOWEST position in the company? (e.g. "may be totally illiterate and uneducated") ....

2 What is the HIGHEST standard of education you expect for any staff position?...............................

Are you able to find Batswana with this level of education who will work for a tourist company?.........

24. Approximately how many people do you employ in the following categories:

	No.	No. of dependents	What is the approx.value of any contributions towards accomm	food
Totally uneducated..				
Poorly educated (barely lit)..				
Reasonably ed. (read/write)..				
Well educated (JC)..				
Post School qualification..				
sub-total..				
Casual labourers..				
total..				

How much are casual labourers paid? P.......(hr/day/week)

How much do you pay out to casual labour annually? P.........

Where are they recruited?.........

For what type of work are they employed?....................

If this is seasonal work, for what months do you employ them?

25. Do you have a deliberate training policy for staff?......

If yes, how many people are: currently in training.......

have been trained..........

Who does the training?..................................

How? (in service/courses etc)..........................

EQUIPMENT

26. MOTOR VEHICLES

1. How many motor vehicles do you have?

   WHAT MAKE WHERE PURCHASED (Name of Company)

   ....

   ....

   ....

   ....

   ....

2. What is your annual cost for motor vehicle:

   ITEM COST WHERE PURCHASED

   (Name of Coy)

   1.LICENCES..

   2.3RD PARTY..

   3.COMP.INS..

   4.P.S.V.LIC..

   5.ROADWORTHY..

   6.FUEL & OIL...

   (if mobile please.....................................

   indicate centres......................................

   where fuel purchased)..............................

3. Do you do your own servicing/maintenance for motor

   vehicles?.........If yes, cost p.a.+- P..............

   From which supplier (s) do yo buy spares?

   (name and centre)

   a)...

   b)...

   c)...

4. If you do not service your own vehicles where is this carried out (name and centre and cost p.a.)

a)...P.....

b)...P.....

c)...P.....

27. <u>AIRCRAFT</u>

Do you have your own aircraft?

(If yes please complete Appendix A)

28. <u>BOATS</u>

Do you own any powered boats?.........Number?.........

What is your annual cost for power boat

	COST	WHERE PURCHASED
1.Licences		
2.Insurances		
3.Fuel & Oil		
4.Service & Maintenance		

2. Do you use Makoros/Canoes?.........................

If yes, where are they hired?......................

From whom? (names if possible)....................

29. <u>GENERATORS</u>

Do you run your own generators for power?........

If yes, what is your annual cost for

	COST	WHERE PURCHASED
1.Insurance		
2.Fuel & Oil		
3.Service & Maintenance		

MISCELLANEOUS PURCHASES/SERVICES

30. Where do you buy

	name of centre	alternative centre/s	approx.value per annum
Meat			P........
Dairy Products			P........
Fresh Vegetables			P........
Tinned Food			P........
Other Food			P........

31. Do you have any printing work done?......................

If yes, what?..

Is printing done in Botswana?..........................

If yes, in which centre?..............value p.a. P......

Name of Printer..

If no, where is it done?..............value p.a. P......

and why not in Botswana?..............................

32. When buying day to day camp "maintenance" items, (e.g. crockery, cleaning gear etc) do you usually buy in Botswana?..................

If "yes" which centre?................value p.a.........

Name of Supplier.......................................

If "no" where do you buy?.............value p.a.........

33. 1.Do you stock liquor to sell to clients?...........

If yes, how much do you expect to sell annually to clients:P..........   to staff:P.........

2.Where do you buy your liquor stocks?

South Africa....Amount P.....Zimbabwe....Amount P.....

Botswana........Amount P.....Other.......Amount P.....

Name (s) of Suppliers in Botswana....................

3. If you buy outside Botswana, why?

More convenient/Cheaper/Better selection/Other

....

If you don't supply liquor, how much do you think

your clients spend on liquor in Botswana?..........

CURIOS/CRAFTS

34. 1.Do you stock curios for sale to clients?...........

Do you buy them in Botswana?.....Approx. cost p.a..

If you buy in Botswana please complete Appendix E

If no, where...............Approx. cost p.a.......

2.Do clients buy curios from other places/people whilst

driving with you?.....................if yes

WHERE (PLACE)	FROM WHOM	ESTIMATED VALUE PER PERSON

....

....

....

....

AIR CHARTER

35. 1.If you arrange flights for your clients to Botswana,

which airline do you use for longhaul clients?.........

To which international centre?.........................

2.How much do you or your clients pay for air charter

annually?............To whom?....................

36. Do you use Air Botswana for your clients from there to

Botswana?.......

If yes, how much do you pay annually?P...........

If no, and your clients fly in, why not?...........

(Please use Appendix F if you would like to comment further on the service and/or benefits Air Botswana should offer before you would use them regularly.)

OTHER SERVICES

37. Do you bank in Botswana?...........if yes, in what centre?..

What is annual cost of bank services, interest etc P.....

If no, where do you bank....................................

Why not in Botswana?..

38. Do you allow credit cards?..................................

If yes, where do you cash them?..........................

How much of your turnover is paid by credit card?P.......

If no, why not...

Would you allow credit cards if you could cash them and get immediate payment at your local bank?................

If you did use cards do you think it would increase spending by clients?............By how much? P.........

39. What do you pay for services for

	COST	TO WHOM
Accounting		
Tax Advice		
Legal Advice		

41. If you have thatched roofs, what did it cost you for

thatching grass............

labour to thatch..........

How often are the roofs repaired.......re-thatched.....

Annual cost of above P......................

Where does the thatching grass come from?.............

42 What is the approximate REPLACEMENT value of the

capital investment in:

Aircraft:.................................P....

Vehicles:.................................P....

Boats:....................................P....

Motors for boats:.........................P....

Maintenance equipment and facilities.............P....

FACILITIES FOR CLIENTS:

Buildings.................................P....

Semi-permanent camps......................P....

Tents.....................................P....

Furniture.................................P....

Linen, Bedding, Sleeping Bags, etc...............P....

Crockery and Cutlery......................P....

FACILITIES FOR STAFF:

Buildings.................................P....

Semi-permanent camps......................P....

Tents.....................................P....

Huts......................................P....

Furniture.................................P....

Linen, bedding, sleeping bags, etc...............P....

Crockery and cutlery......................P....

(N.B.Your insurance value may be a useful guide) ------

43. How much do you spend on communications annually?

(Radio/Telephone/Telex) P........

44. How much did you pay in Botswana Company tax last year?

P.......

45. How much do you pay in entrance/camp fees to the Wildlife Department each year? P......

46. What licences does the company hold?

	Number	How much does this cost p.a?	Length of time from application to receipt of licence
Guides	....	....	....
liquor	....	....	....
Firearms	....	....	....
Hunting	....	....	....

Are there any other licence/registration fees you have to pay?.......If yes, what are they:..................

....

To whom do you pay?.................................

How much does it cost annually?.P.......

47. Do you operate any joint ventures with other local companies?.........If yes, which companies?..........

....

How much do you transfer to them annually? P..........

48. 1.Are you a member of HATAB?..........

If yes, are you satisfied with it?..........

If no, what would you do to change it?................

....

....

2. If you are not a member, any particular reason why not?..

....

49. Are you satisfied with the way your business is going?.....

Are you intending to continue in business in Botswana?.....

Are you doing better or worse than you were 5 years ago.?........

If better/worse, can you identify the reasons why?

....

....

....

Are you planning any new developments?.........

Will this create more jobs?...................

If yes, approx. how many?...................

What will be the approx. capital investment?.P.........

When do you expect to start the development?......

and finish?..............

50. Do you think tourism is a good thing or a bad thing for Botswana?..............................

Why?...

....

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....

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....

....

....

51. Who are the company shareholders and what is their nationality?..

....

....

52.Who are the company Directors?.........................

PART II

53. Do you have any problems between yourself and local Batswana?.....

If yes, what are they?...................................

....

....

(Use Appendix G to say how you think they can be overcome)

54. Do you find any particular problem areas between your clients and Ex-patriot staff?......If so, what.........

....

....

....

Batswana staff?......If so,.what.........................

....

....

55. Do you think the Botswana authorities should be involved in promoting tourism?............

Any comments?..

....

....

56. Are you satisfied with the attitude of Government officials towards you or your clients?.................

(If "no" please use Appendix B to comment.)

57. Are you satisfied with the legislation which affects your operation?............

If "no" how would you amend it to make your job easier?

(Please use Appendix C to comment)

58. How are your relations with local (as opposed to central government) officials?...........................

If you are not satisfied with the relationship, how would you change it (please use Appendix D to comment)

59. Do you have any tourist companies that are not based in Botswana?...

Where are these operating?.............................

60. What do you feel about the policy of giving concessions?

(Please use Appendix J to comment)

(APPENDIX A)

(QUESTION 29)

AIRCRAFT

1.

MAKE WHERE PURCHASED

....

....

....

....

2. ANNUAL COST OF:

COST WHERE PAID

Licences..

Insurances..

Airworthy..

Landing Fees..

Pilots Licences..

Fuel & Oil..

....

....

Other Costs

Specify..

APPENDIX B

Company name (OPTIONAL)..............................

NB This document may be totally anonymous if you wish. It will be held under confidential file in the University of Cape Town, as part of these research papers. The document will not be made available to any other persons.

Comments on Attitude of Government officials towards your staff and clients.

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APPENDIX C

Company name (OPTIONAL).........................

NB This document may be totally anonymous if you wish.

It will be held under confidential file in the University of Cape Town, as part of these research papers.

The document will not be made available to any other persons.

Comments on Legislation affecting your operation.

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APPENDIX D

Company name (OPTIONAL)........................

NB This document may be totally anonymous if you wish.

It will be held under confidential file in the University of Cape Town, as part of these research papers.

The document will not be made available to any other persons.

Comments on relationships with local government officials.

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APPENDIX E

Company name...................................

Name(s) of person(s) from whom curios are bought and place where they may be contacted

(This information is sought so that we can find out who your supplier employs and from whom he buys raw materiel, i.e. how many jobs are being created through the curio trade.)

Name	Contact at, or through

APPENDIX F

Company name:..............................

NB This document may be totally anonymous if you wish.
It will be held under confidential file in the University of Cape Town, as part of these research papers.
The document will not be made available to any other persons.

Comments on Air Botswana services and improvements/benefits needed if their services are going to be used by you.

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APPENDIX G.

Company name:....................

NB This document may be totally anonymous if you wish.
It will be held under confidential file in the University of Cape Town, as part of these research papers.
The document will not be made available to any other persons.

Relationships with local Batswana; problems and how they may be overcome.

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APPENDIX H 1

Name of Camp...

Type of site: Drive-in/Tented/Permanent

Number of beds....................

Operating season for staff from .... to ....

Operating season for clients from............to ....

Type of activity offered;

Prime activity....................

\+ Game-viewing/photography,

Hunting,

Night time entertainment

Makoro trips

Air sight-seeing

Walking in bush

Specialist trips(specify)

Fishing

Other (specify)

Grid reference.......................

Radio call sign ....

Nearest airfield.....................

Type of lease........................

with whom.........................

Is there an airstrip near the camp?..........

If yes, what are the co-ordinates?......................

What is its' size? Length..........width.............

What is the altitude?..................

What is the weight restriction.........

Special camp features:

APPENDIX J

Company:.................

NB This document may be totally anonymous if you wish.
It will be held under confidential file in the University of Cape Town, as part of these research papers.
The document will not be made available to any other persons.

Comments on Concessions

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APPENDIX B

QUESTIONNAIRE FOR NON-BOTSWANA TOUR OPERATORS

TOURIST INDUSTRY RESEARCH QUESTIONNAIRE

Please return to:
J Fowkes
c/o Kalahari Conservation Society
P O Box 859
Gaborone

---

1. NAME OF COMPANY:...

2. ADDRESS FOR MAIL...

   ....

   TELEPHONE NUMBER................OR.......................

   TELEX..................

3. What is the primary activity of the Company?(Circle)

   Hotel /Motel /Camp based Safaris /Mobile Safaris /

   Camp based Hunting/Mobile Hunting/Game Lodge/

   Other (please specify).................................

4. How long has the company been operating:

   in Botswana..............?elsewhere....................?

5. Is the company registered in Botswana?..................

   If "no" where is the parent company based?..............

NAME OF PERSON INTERVIEWED...................................

POSITION IN COMPANY..

Interviewed by:..............Date:..........Time:...........

6. HOW many trips do you make to Botswana each year?.........

and during which months?...................................

7. What are the routes that you follow?........................

....

....

8. What is the average number of people on each trip?...........

9. How much do you spend per trip and where ,on

	Amount spent	Place spent
9.1 Food	1 2 3	
9.2 Liquor	1 2 3	
9.3 Fuel	1 2 3	
9.4 Accommodation or camping	1 2 3	

9.5 Wildlife park entrance fees

10 On average how much do your groups spend on tips........

curios.......

11 Cost of Air Charter P............With whom................

12 Cost of Vehicle Repairs P........... Where........

13 Payments to Makoro Polers P............Where........
Value of any rations given polers P.................

14 Promotional Expenses (Advertising, Brochures etc) P..........

APPENDIX C

QUESTIONNAIRE FOR HOTELS

J. FOWKES **APPENDIX C**

c/o KALAHARI CONSERVATION SOCIETY
P.O. BOX 859
GABORONE

TOURIST INDUSTRY RESEACH PROJECT.

Under the auspices of the Kalahari Conservation Society, a research project is being conducted to ascertain the contribution made by tourism to the economy of Botswana.

Please would you assist by indicating WHAT PERCENTAGE OF YOUR BUSINESS IS BASED ON TOURISM = ... %

It is appreciated that this figure is an estimate and the difficulty of separating tourists from other guests is accepted. However, your assessment of the use of your Hotel is the most accurate that can be made.

To help in the assessment a "tourist" would be any person travelling away from home for holiday purposes and, as a measure of the importance of tourist income to you, one can ask "WHAT WOULD BE THE IMPACT ON YOUR BUSINESS IF NO TOURISTS CAME TO YOUR HOTEL?"

Would you reduce your staff? Yes / No
If "Yes" by how many people? ....
What wages would this save per month ....
How much less food would you buy in to the Hotal per month? ....
How much less liquor would you buy in to the Hotel per month? ....
What would be the reduction in your turnover per month? ....

Your assistance in answering these questions would be most appreciated in ensuring that this project is as comprehensive as possible.

Please return the completed questionnaire to the Kalahari Conservation Society at the above address

Thankyou for your help,

Yours faithfully

John Fowkes.

APPENDIX D

QUESTIONNAIRE FOR CLIENTS OF MOBILE OPERATORS

TOURIST INDUSTRY RESEARCH PROJECT.

A Research project is being undertaken, under the auspices of the Kalahari Conservation Society, to ascertain the contribution made by tourism to the economy of Botswana.
Please would you assist in this project by indicating:-

The name of the tour operator with whom you stayed:.......................

No. of days.........from: to:

At which camps you stayed :......................................

....

	AMOUNT	PLACE
How much you spent on curios?	....	
	....	
	....	
How much you gave in tips	....	
	....	
	....	
If you gave any food or clothing to local Batswana the approx. value	....	
	....	
Apart from organised trips, did you independently hire - a vehicle	....	
a boat	....	
an aircraft	....	

Thankyou for your help. If you would like to comment further on your stay, please turn over.

PLEASE RETURN THE COMPLETED DOCUMENT TO:
KALAHARI CONSERVATION SOCIETY
P.O.BOX 859
GABORONE
BOTSWANA

Comments would be welcomed on:

How you heard about Botswana? Travel Agent Word of mouth/Adverts/

Other:..............................

Were your travel arrangements Bad 1 2 3 4 5 6 7 8 9 10 Good

Was your accomodation Bad 1 2 3 4 5 6 7 8 9 10 Good

Was the attitude of Botswana Customs and Immigration

Bad 1 2 3 4 5 6 7 8 9 10 Good

Was the attitude of local people

Rude 1 2 3 4 5 6 7 8 9 10 Friendly

Would you come back?.......Recommend it to your friends?.......

Any comments on Botswana and things that you liked/disliked:

....

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Your name and address (If you wish)..............................

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APPENDIX E

QUESTIONNAIRE FOR INDEPENDENT TRAVELLERS 1984

c/o Kalahari Conservation Society
P.O. Box 859
GABORONE
Botswana

APPENDIX E

1984 TOURIST INDUSTRY RESEARCH PROJECT

Under the auspices of the Kalahari Conservation Society, a Research Project is being undertaken to ascertain the contribution made by tourism to the economy of Botswana.

Please would you assist in this project by indicating:

1. The number of people in your party ....
2. The dates you were in Botswana: From............To...............
3. The route you followed:...
....
....
....

	NAME OF PLACE	AMOUNT PAID
4. Where you stopped overnight (Please show camping or Accomodation)	....	....
	....	....
	....	....
	....	....
	....	....
5. How much you spent on fuel	....	....
	....	....
	....	....
	....	....
6. How much you spent on food	....	....
	....	....
	....	....
	....	....
7. How much you spent on Curios etc	....	....
	....	....
	....	....
	....	....

Thanks for your help. If you would like to comment on other aspects of your trip, please turn over.

Please return the completed form to the Kalahari Conservation Society at the address above.

John Fowkes.

John Fowkes

APPENDIX F

QUESTIONNAIRE FOR USE WITH THE FOUR WHEEL DRIVE CLUB

The Graduate School of Business,
University of Cape Town,
P Bag, Rondebosch.
7700
November 1984.

To members of the Four Wheel Drive Club,

BOTSWANA TOURISM RESEARCH PROJECT.

A Research Project is being undertaken, on behalf of the Kalahari Conservation Society, Gaborone, to evaluate the contribution made by Tourism to the economy of Botswana.

There are no complete records of Tourists, or their expenditure in Botswana, and thus no solid base on which planning can be developed.

If you have been to Botswana recently please would you contribute to the Study by completing the questionnaire that follows and returning it to me at the Graduate School of Business before December 16th, 1984.

Your assistance will be of great help,

Yours faithfully,

John Fowkes

John Fowkes.

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1. What were the dates of your trip to Botswana? From , To

2. What route did you follow?:

3. What type of vehicle did you use?:

4. How much did you spend on fuel, IN BOTSWANA?: ____________________

5. What distance did you cover?: ________Kms.

6. What was your average fuel consumption for the whole journey?: ________Km/Litre
or ________Lt/100km

7. Where did you stop overnight, did you take a room or camp out and how much did it cost you?:

Place	Type of Accomodation	Total Cost.

8. How many people were there in your party?: ______

What did you pay in National Park Entrance Fees?: ________

PLEASE TURN OVER

9. How much did you spend, in Botswana, on food?:

on liquor?:

10. Did you buy any Curios? If so,
Where?. much did you spend?:........................

11. Did you hire any Makoros or Canoes?: If so,

Where were they hired?................How much did you pay (in total)........

12. How much did you give in tips?:...................

13. Did you have any vehicle repairs carried out (tyres etc)?........

If so, Where?....................How much did it cost?............

COMMENTS WOULD BE WELCOMED ON:

Was your accomodation generally BAD 1 2 3 4 5 6 7 8 9 10 GOOD

Were the campsites generally BAD 1 2 3 4 5 6 7 8 9 10 GOOD

Was the attitude of Botswana Customs and Immigration Officials

BAD 1 2 3 4 5 6 7 8 9 10 GOOD

Were local people RUDE 1 2 3 4 5 6 7 8 9 10 FRIENDLY

Would you go back?. ....Recommend Botswana to your friends?.

Any comments on Botswana and things you liked or disliked. or any other expenses you incurred.

APPENDIX G

QUESTIONNAIRE FOR USE WITH ASSOCIATED INDUSTRIES

ASSOCIATED INDUSTRY QUESTIONNAIRE

Trading name:............................. Town:................

1. Name of company:

2. Address for mail:

3. Physical address:

   Tel no/s   Telex

4. Company owned by:

5. Primary activity of the company:

6. Other activities:

7. How long has company been operating:

8. Is company Botswana registered:

9. Name of person interviewed:

   Position in company:

   Interviewed by: Date:

10. How much of the company acitivty exists because of tourist activity either directly %

indirectly % (i.e. you supply people in the the tourist trade)

11. Is the business seasonal:

12. What would be the impact on your business if tourism colsed down tomorrow. Would you close down?

If not, would you reduce staff?

If so by how many?

13. No of staff employed:

14. Gross salaries paid annually (incl bonus)

Value of uniforms

food

15 Gross turnover: Primary activity

Secondary activity

16. Costs per annum P To whom paid

16.1 Rent....................................

16.2 Electricity...............................

16.3 Water....................................

16.4 Tel/telex................................

16.5 Postages.................................

16.6 Annual return............................

16.7 Licences.................................

16.8 Account/tax..............................

16.9 Legal advice.............................

16.10 Insurance...............................

16.11 Bank charges............................

16.12 Building repair.........................

16.13 Maintenance of equip....................

16.14 Printing & stationery...................

17. Company tax paid last year

18. Suppliers of goods that you sell

APPENDIX H

LIST OF IDENTIFIED TOUR OPERATORS

APPENDIX H. LIST OF IDENTIFIED TOUR OPERATORS.

COMPANY NAME		ADDRESS FOR MAIL	NAME OF PERSON INTERVIEWED
OPERATORS WITH PERMANENT FACILITIES IN FIXED SITES.			
Chanoga Fishing & Photo Safaris	(INT)	Box 431, Maun	Dawid Van Heerden
Chobe Chilweru	(INT)	Box 22, Kasane	Brian Graham
Chobe Game Lodge	(INT)	Box 32, Kasane	Jonathan Gibson
Circle Holdings (Jwala Game Lodge)	(INT)	Box 58, All Days,0909	Roger and Del Petty
Crocodile Camp	(INT)	Box 46, Maun	Lindsay Birch
Northwest Holdings (Delta/Oddballs)	(INT)	Box 39, Maun	P. Sandenberg & R. Knight
Desert & Delta Safaris (Camp Okavango)	(INT)	c/o Box 448, Maun	Jessie Neil
Gametrackers	(INT)	P.Bag 0077,Gaborone	Petro Jonker
Island Safari Lodge	(INT)	Box 116, Maun	Tony & Yoey Graham
Koro Safari Lodge	(INT)	Box 11, Orapa	Corrie Smuts-Steyn
Limpopo Inn		Box 26, Selebi-Phikwe	Joost Alsemgeest
Lloyds Camp	(INT)	Box 37, Maun	Lloyd Wilmot
Mashatu Game Lodges	(INT)	Box 4280, Johannesburg 2000	Grahame Thomson
Moremi Safaris	(INT) #1	Box 32, Maun	Doug Skinner
Makolwane (Pty) Ltd (Nata Lodge)	(INT)	P. Bag 10, Francistown	Nigel Ashby
Ntswi Safaris	(INT)	Box 245, Bon Accord,0009.	Eric Birkenstock
Nxamaseri Fishing Camp	(INT)	Box 250, Maun	P.J. Besterlink
Okavango Explorations (Xugana)	(INT)	Box 236, Maun	David Hartley
Okavango Fishing Safaris (Shakawe)	(INT)	Box 446, Francistown	Barrie Pryce
Okavango River Lodge	(INT) #2	Box 32, Maun	Tony & Yoey Graham
Sitatunga Camping Safaris	(INT)	c/o Box 448, Maun	John Seaman
Stevensford Safaris	(INT)	Box 26, Sherwood Ranch	Clive Steyn
Tsaro	(INT)	c/o Box 448, Maun	Carole Hughes
Tuli Lodge	(INT)	Box 184, Bergvlei 2012	Monty Fuhr
Xaxaba Safaris	(INT)	Box 147, Maun	Paul & Penny Rawson
Bird Safaris	(INT)	Box 15, Maun	Mark Kyriacou
Hunter's Africa	(INT)	Box 11, Kasane	Neville Peak
Jao Safaris	(INT)	Box 324, Gaborone.	Louis Nchindo
Kerr, Downey & Selby	(INT)	Box 40, Maun.	Charles Williams
Micheletti Bates	(INT)	Box 15, Maun	Mark Kyriacou
Vira Safaris	(INT)	Box 1602, Gaborone	R. & A. McFarlane
Safari South	(INT)	Box 40, Maun	Charles Williams
Kalahari Desert Safaris	(INT)	c/o Box 15, Maun	
Zanzibar Hotel		Box 26,Selebi-Phikwe	Joost Alsemgeest
MOBILE OPERATORS - BOTSWANA REGISTERED AND BASED IN BOTSWANA.			
Bahati	(INT)	P. Bag 12, Maun	Dave Lincoln
Buffalo Trails	(NOT)		Paul Klotsch
Chobe Game Safaris	(INT)	Box 30, Kasane	Fred Mitchell
Gamerovers Botswana	(INT)	c/o Box 448, Gaborone	Susan Singleton
Holiday Safaris	(INT)	P. Bag 0016, Gaborone	Syd Youthed
Kalahari Photographic Expeditions	(INT)	Box 1913, Gaborone	H. Allmendinger & N. Bornman
Kitso	(INT)	Box 215, Maun	Colin & Frank Dandridge
Okavango Wilderness Safaris	(INT)	P. Bag 14, Maun	Colin Bell & Chris McIntyre
Okuti Safaris	(INT)	c/o Box 448, Maun	Rolfe Schleipfer
Botswana Safaris Unlimited	(INT)	Box 253, Maun	Willie Zing
Transokavango	(NOT)	c/o Box 205, Maun.	Mike Gunn
Okavango Studentenreisen	(INT)	Box 46, Maun	Gisbert Hauske
Capricorn Safaris Botswana	(NOT)	P. Bag 21, Maun	

MOBILE OPERATORS - BOTSWANA REGISTERED AND BASED ELSEWHERE.

Afroventure Safaris	(INT)	c/o Box 892,Gaborone.	Alan Simpson
Educational Wildlife Expeditions	(INT)	c/o Box 448, Gaborone	Clive Walker
Karibu Safaris	(INT)	Box 35027, Northway, 4051	Dominique Belle
Penduka Safaris	(INT)	C/O Box 1453, Gaborone	Izak Barnard
Quest Africa	(INT)	Box 147, Maun	Michael Myers
S A Safaris	(INT)	Box 322, Maun	Tiaan Burg

MOBILE OPERATORS NOT REGISTERED IN BOTSWANA.

Adventure Organisers	(INT)	Box 300, Constantia, 7848	Alan Wolfram
Backtrackers	(NOT)		Clive Kopfer
Drifters	(INT)	Box 48434,Roosevelt Park,2129	Andy Dott
Encounter Overland	(NOT)	c/o Travel Tours, Johannesburg	
Get Lost	(INT)	45 Smits Rd., Dunkeld, 2196	John Matterson
Guerba Expeditions	(INT)	Westfield House, Westerby, UK.	
Rotel Tours	(INT)	8391 Tittling/Passau	
Southern Cross Safaris	(INT)		Gernod Sentefol
Trailblazers	(INT)	Box 13562, Whitfield 1467	Teaque Payne
Trail Promotions	(INT) *3	117 Boston Hs.Cape Town 8000	Willie Olivier
Chanoga Safaris	(NOT)		
World Expeditions	(NOT)		
Sobek Expeditions	(NOT)		
Adventure Nel Mondo	(NOT)	Via Anoda Pistoia,7-00152,Rome.	

(INT) = Company interviewed
(NOT) = No interview conducted

*1 = This lease has been sold
to John Sanderson-Smith

*2 = This lease has been sold
to Klaas Bolle

*3 = Closed in December 1984

APPENDIX I

LIST OF ASSOCIATED INDUSTRIES

APPENDIX I:. ASSOCIATED INDUSTRIES.

NAME OF COMPANY	TOWN
AIR BOTSWANA	Gaborone
MUSGROVE & WATSON	Gaborone
PAN AFRICAN TRAVEL BUREAU	Gaborone
COOPER & LYBRAND	Gaborone
DELOITTES, HASKINS & SELLS	Gaborone
SERVICES RENDERED	Gaborone
PRICE, WATERHOUSE	Gaborone
BOTSWANACRAFT Mkt	Gaborone
KALAHARI AIR	Gaborone
BUSHMAN GIFT SHOP	Gaborone
CAR CARE	Gaborone
RENNIES AIR FREIGHT	Gaborone
CLIFFS' ENGINEERING	Gaborone
AVIS	Gaborone
PHUTI TRAVEL	Gaborone
PIM, GOLDBY	Gaborone
DAMONT & BOSTOCK	Gaborone
TIRO YA DIOTLA	Gaborone
THE GALLERY	Maun
NGAMI MOTORS	Maun
MULBRIDGE TRANSPORT	Maun
UNITED AUTOMOBILES	Maun
NORTHERN AIR	Maun
BAITIREDI BENKELE	Maun
MANTSORO'S COSMETIQUE	Maun
MAUN BAKERY	Maun
MAUN FRESH PRODUCE	Maun
DUCK INN	Maun
MAUN BUTCHERY	Maun
NGAMILAND STATIONERS	Maun
MAUN CONSUMERS CO-OP	Maun
PEP STORES	Maun
MERLIN SERVICES	Maun
SEGWANA MAUN	Maun
MAUN WHOLESALERS	Maun
MAUN WHOLESALE CENTRE	Maun
CHARALAMBOUS TRADING	Maun
AIR SERVICES	Maun
RILEY'S GARAGE	Maun
BUSHMAN CURIO SHOP	Maun
AER KAVANGO	Maun
SEFALANA MAUN	Maun
BGI MAUN	Maun
BABBLER PRINTS AND INTERIORS	Maun
MAUN OFFICE SERVICES	Maun
NORTHERN BUILDING SUPPLIES	Maun
BGI KASANE	Kasane
CHOBE ENGINEERING	Kasane
CHOBE SAFARI LODGE OFFSALES	Kasane

CHOBE TRADING BOTTLE STORE	Kasane
LOUISE BOTTLE STORE	Kasane
SEFALANA KASANE	Kasane
SAVAS STORE	Kasane
CHOBE TRADING STORE	Kasane
CHOBE BUTCHERY	Kasane
KASANE ENTERPRISES	Kasane
GHANTSICRAFT	Ghanzi
SUA PAN FILLING STATION	Nata
BGI NATA	Nata
SEGWANA FRANCISTOWN	Francistown
SEFALANA FRANCISTOWN	Francistown
STENOGRAPHICS	Francistown
MARATHODI MARU	Francistown
TATI TRADING COY	Francistown
FRANCISTOWN TOYOTA	Francistown
BUSHMAN PRODUCTS	Francistown
SHELL COY FRANCISTOWN	Francistown
FRANCISTOWN PRINTING	Francistown
BOTSWANA LIQUOR MFG	Francistown
HASKINS GARAGE	Francistown
BGI FRANCISTOWN	Francistown
BIRD & GAME BOTSWANA	Francistown

APPENDIX J

SPREADSHEET OF TOUR OPERATOR DATA

Appendix J contains an amalgamation of all the data collected from tour operators.

Data is presented in six sets:

a. Safari lodges
b. Fixed camps
c. Safari outfitters (Hunting companies)

Companies a. to c. have fixed bases in Botswana.

d. Mobile operators with companies registered in Botswana but who operate from a foreign base
e. Mobile operators with companies both registered and based in a foreign country
f. Mobile operators with companies both registered and based in Botswana.

Appendices J.1. to J.3. contain summaries of all the data under the headings a. to f. as above. Each data set is presented in a numbered column. This column number is carried through for each data set throughout the appendix.

Appendices J.4 to J.13. contain the data as supplied by each safari operator. Each Appendix is divided into two pages. Page A setting out companies in categories a. to c. and page B setting out companies in categories d. to f.

APPENDIX J.1. SUMMARY OF DATA FROM ALL OPERATORS

INCOME, PROMOTIONAL COSTS

	TOTAL INCOME	PROMOTIONAL COSTS PERSONAL	BROCH/AD	TOTAL	CAPITAL INVESTED TO DATE
a. SAFARI LODGES	1,986,320	0	152,452	152,452	8,426,887
b. FIXED CAMPS	3,696,451	108,920	473,483	582,403	7,706,000
c. HUNTING Coys.	3,980,000	178,000	100,000	278,000	3,473,300
d. MOB. bots/for	502,276	15,000	109,000	124,000	61,200
e. MOB. for/for	156,942	0	0	0	0
f. MOB. bots/bot	789,974	50,617	25,470	76,087	1,393,860
TOTAL	11,111,963	352,537	860,405	1,212,942	21,061,247
COLUMN NUMBER	8	9	10	11	76

CLIENT DATA

	NUMBER OF CLIENTS PERMANENT	CAMPING	TOTAL	PERCENTAGES OF CLIENTS FROM: NORTH AMERICA	EUROPE	S.AFRICA	OTHER AREAS
a. SAFARI LODGES	6,029	14,600	20,629	2	31	59	8
b. FIXED CAMPS	10,575	2,300	12,875	25	19	52	3
c. HUNTING Coys.	377	0	377	84	13	1	2
d. MOB. bots/for	1,599	0	1,599	15	15	61	10
e. MOB. for/for	907	0	907	0	56	44	0
f. MOB. bots/bot	836	0	836	13	35	46	6
TOTAL	20,323	16,900	37,223	12	27	55	6
COLUMN NUMBER	12	13	14	15	16	17	18

ESTIMATED NUMBERS OF CLIENTS FROM:

	NORTH AMERICA	EUROPE	SOUTH AFRICA	OTHER AREAS	NUMBER OF CAMPING TRIPS IN BOTSWANA
a. SAFARI LODGES	490	6,444	12,108	1,587	0
b. FIXED CAMPS	3,190	2,406	6,877	402	0
c. HUNTING Coys.	316	48	5	9	0
d. MOB. bots/for	233	233	977	157	169
e. MOB. for/for	0	505	402	0	63
f. MOB. bots/bot	111	293	385	47	78
TOTAL	4,340	9,928	20,754	2,201	310
COLUMN NUMBER	19	20	21	22	23

EMPLOYEE DATA	TOTAL STAFF	NUMBER OF BATSWANA	WAGES PAID CASUALS	WAGES PAID BATSWANA	VALUE OF FOOD SUPPLIED	VALUE OF UNIFORMS SUPPLIED	OTHER BENEFITS	VALUE OF MEAT SUPPLIED	ESTIMATED TIPS RECEIVED	TOTAL VALUE RECEIVED
a. SAFARI LODGES	178	158	2,450	485,125	98,366	4,050	0	0	4,098	594,089
b. FIXED CAMPS	273	223	27,001	877,123	171,160	16,204	65,516	0	36,727	1,193,731
c. HUNTING Coys.	376	357	7,000	1,210,896	115,520	13,430	8,200	189,981	26,440	1,571,467
d. MOB. bots/for	4	4	500	4,080	100	400	0	0	5,705	10,785
e. MOB. for/for	0	0	0	0	0	0	0	0	0	0
f. MOB. bots/bot	39	32	2,940	81,980	21,690	843	1,774	0	3,480	112,707
TOTAL	870	774	39,891	2,659,204	406,836	34,927	75,490	189,981	76,450	3,482,779
COLUMN NUMBER	24	25	26	28	29	30	31	32	33	34

APPENDIX J.2. SUMMARY OF DATA FROM ALL OPERATORS (CONTINUED)

CATERING COSTS

	FOOD PURCHASES - STAFF	FOOD PURCHASES - CLIENTS	LIQUOR PURCHASED	TOTAL CATERING COSTS
a. SAFARI LODGES	98,366	128,428	196,906	423,700
b. FIXED CAMPS	171,160	266,635	163,533	601,328
c. HUNTING Coys.	115,520	169,600	128,243	413,363
d. MOB. bots/for	100	83,200	56,015	139,315
e. MOB. for/for	0	18,974	18,920	37,894
f. MOB. bots/bots	21,690	88,459	35,780	145,929
TOTAL	406,836	755,296	599,397	1,761,529
COLUMN NUMBER	35	36	37	38

TRANSPORT COSTS

	NUMBER OF VEHICLES	NUMBER OF BOATS	V+B+G * FUEL & OIL	VEHICLE REPAIR COSTS	OTHER VEHICLE COSTS	AIRCRAFT FUEL COSTS	AIRCRAFT MAINT' COSTS	OTHER AIRCRAFT COSTS	TOTAL TRANSPORT COSTS
a. SAFARI LODGES	16	18	154,029	nda	8,000	nda	12,299	nda	174,328
b. FIXED CAMPS	80	41	240,533	33,271	50,211	49,117	22,041	3,243	398,416
c. HUNTING Coys.	61	17	281,088	47,148	42,995	3,000	12,500	nda	386,731
d. MOB. bots/for	2	2	76,950	13,050	26,087	8,250	2,000	500	126,837
e. MOB. for/for	0	0	18,950	1,100	19,040	2,145	nda	440	41,675
f. MOB. bots/bots	27	0	82,273	20,190	5,454	9,000	12,551	50	129,518
TOTAL	186	78	853,823	114,759	151,787	71,512	61,391	4,233	1,257,505
COLUMN NUMBER	39	40	41	42	43	44	45	46	47

*Vehicle / Boats / Generators

PAYMENTS TO SECONDARY BUSINESSES

	PRINTING COSTS	AIR CHARTER	BANKING COSTS	ACC/TAX LEGAL SERVICES	SECRET-ARIAL SERVICES	INSUR-ANCE COSTS	TOTAL SERVICE COSTS
a. SAFARI LODGES	0	0	18,875	6,425	0	12,000	37,300
b. FIXED CAMPS	12,150	221,616	217,467	44,557	42,248	2,094	540,132
c. HUNTING Coys.	4,500	278,000	14,813	19,000	1,480	13,900	331,693
d. MOB. bots/for	0	64,820	240	5,280	100	750	71,190
e. MOB. for/for	0	12,780	0	0	0	0	12,780
f. MOB. bots/bots	2,584	6,500	3,628	15,173	0	3,680	31,565
TOTAL	19,234	583,716	255,023	90,435	43,828	32,424	1,024,660
COLUMN NUMBER	48	49	50	51	52	53	54

APPENDIX J. 4.B. COMPANY HISTORY AND SEASONALITY

MOBILE OPERATORS

REF	COMPANY NAME	1 YEAR ESTABLISHED	2 YEARS IN OPERATION	3 TAKEN OVER BY CURRENT OWNER IN	4 YEARS WITH CURRENT OWNER	5 MEMBER OF HATAB	6 SEASON FROM	7 TO
d.	MOBILE OPERATORS BOTSWANA REGISTERED - FOREIGN BASED							
M1	Afroventure Safaris	73	12	73	12	Y	Jan	Dec
M2	Educational Wildlife Expeditions	76	9	76	9	Y	Apr	Oct
M3	Karibu Safaris	83	2	83	2		Jan	Dec
M4	Penduka Safaris	68	17	68	17	Y	Jan	Oct
M5	Quest Africa	80	5	80	5	Y	Jan	Dec
M6	S A Safaris	84	1	84	1	N	Apr	Dec
e.	MOBILE OPERATORS FOREIGN REGISTERED & BASED							
M7	Adventure Organisers	83	2	83	2		Mar	Oct
M8	Backtrackers	85	-	85	-		Jan	Dec
M9	Drifters	84	1	84	1		May	Sept
M10	Encounter Overland	85	-	85	-		Jan	Dec
M11	Get Lost	77	8	77	8	N	Mar	Nov
M12	Guerba Expeditions	85	-	85	-		Jan	Dec
M13	Rotel Tours	83	2	83	2		Jan	Dec
M14	Southern Cross Safaris	85	-	85	-		Jan	Dec
M15	Trailblazers	80	5	80	5		Jun	Sept
M16	Trail Promotions	83	2	83	2		Jan	Dec
M17	World Expeditions	No data available						
M18	Sobek Expeditions	No data available						
M19	Adventure del Mondo	No data available						
f.	MOBILE OPERATORS BOTSWANA REGISTERED - BOTSWANA BASED							
M20	Bahati	83	2	83	2	Y	Mar	Nov
M21	Buffalo Trails	85	-	85	-	nda	nda	nda
M22	Chobe Game Safaris	83	2	83	2	N	Jan	Dec
M23	Gamerovers Botswana	82	3	82	3	Y	Mar	Oct
M24	Holiday Safaris	71	14	71	14	Y	Mar	Nov
M25	Kalahari Photographic Expeditions	84	1	84	1	Y	Apr	Nov
M26	Kitso	79	6	79	6	Y	Apr	Oct
M27	Okavango Wilderness Safaris	84	1	84	1	Y	Jan	Dec
M28	Okuti Safaris	81	4	81	4	N	Mar	Dec
M29	Botswana Safaris Unlimited	70	15	70	15	Y	Jan	Oct
M30	Transokavango	85	-	85	-	nda	nda	nda
M31	Okavango Studentenreisen	80	5	80	5	N	Mar	Oct
M32	Capricorn Safaris Botswana	84	1	85	-	nda	nda	nda

APPENDIX J.3. SUMMARY OF DATA FROM ALL OPERATORS (CONTINUED)

TRANSACTIONS WITH THE INFORMAL SECTOR

	HANDI-CRAFTS PURCHASED	PRODUCTS PURCHASED	PAID FOR MAKOROS	TIPS TO MAKORO POLERS	TOTAL TO MOKORO POLERS	TOTAL TO INFORMAL SECTOR
a. SAFARI LODGES	2,720	4,700	6,350	0	6,350	13,770
b. FIXED CAMPS	16,980	76,310	52,245	3,700	55,945	149,235
c. HUNTING Coys.	4,000	12,000	1,500	0	1,500	17,500
d. MOB. bots/for	26,970	0	18,094	2,828	20,922	45,064
e. MOB. for/for	5,544	0	8,820	1,104	9,924	15,468
f. MOB. bots/bots	16,650	0	900	0	900	17,550
TOTAL	72,864	93,010	87,909	7,632	95,541	258,587
COLUMN NUMBER	55	56	58	59	61	62

PAYMENTS TO GOVERNMENT

	VEHICLE LICENCE FEES	THIRD PARTY INSURANCE	LEASE COSTS	LANDING FEES PAID	TAX PAID	PAID TO DWNP	GUIDE LICENCE HELD	GUIDE LICENCE FEES
a. SAFARI LODGES	441	240	11,600	0	4,260	24,520	5	275
b. FIXED CAMPS	2,915	1,497	60,050	1,957	17,520	62,317	47	2,575
c. HUNTING Coys.	2,342	1,040	186,684	600	67,415	2,500	4	225
d. MOB. bots/for	24	24	0	1,250	3,400	45,854	18	1,725
e. MOB. for/for	0	0	0	220	0	8,638	1	100
f. MOB. bots/bots	806	744	0	1,500	3,476	31,410	12	950
TOTAL	6,528	3,545	258,334	5,527	96,071	175,239	87	5,850
COLUMN NUMBER	63	64	65	66	67	68	69	70

PAYMENTS TO GOVERNMENT (CONTINUED) — FUTURE DEVELOPMENT PLANNED

	LIQUOR LICENCE FEES	HUNTING LICENCE FEES	OTHER LICENCE FEES	COMMUNIC-ATION COSTS *	TOTAL PAID TO GOV'T	JOBS TO BE CREATED	FUTURE CAPITAL INVESTMENT
a. SAFARI LODGES	900	0	730	34,552	77,518	84	645,000
b. FIXED CAMPS	900	150	4,878	70,253	225,012	68	1,186,000
c. HUNTING Coys.	150	323,000	3,610	51,900	639,466	90	420,000
d. MOB. bots/for	0	0	0	1,050	53,327	22	70,000
e. MOB. for/for	0	0	360	0	9,318	8	80,000
f. MOB. bots/bots	0	0	600	11,919	51,405	72	489,500
TOTAL	1,950	323,150	10,178	169,674	1,056,046	344	2,890,500
COLUMN NUMBER	71	72	73	74	75	77	78

APPENDIX J. 4.A. COMPANY HISTORY AND SEASONALITY

SAFARI LODGES / FIXED CAMPS / SAFARI OUTFITTERS(HUNTERS)

REF	COMPANY NAME	1 YEAR ESTABLISHED	2 YEARS IN OPERATION	3 TAKEN OVER BY CURRENT OWNER IN	4 YEARS WITH CURRENT OWNER	5 MEMBER OF HATAB	6 SEASON FROM	7 TO
a.	**SAFARI LODGES**							
F1	Makolwane (Pty) Ltd (Nata Lodge)	85	-	85	-	N	Jan	Dec
F2	Okavango River Lodge	70	15	84	1	Y	Jan	Dec
F3	Crocodile Camp	66	19	75	10	Y	Jan	Dec
F4	Island Safari Lodge	73	12	73	12	Y	Jan	Dec
F5	Koro Safari Lodge	85	-	85	-	N	Jan	Dec
F6	Limpopo Inn	30	55	85	-	nda	Jan	Dec
F7	Tuli Lodge	72	13	72	13	N	Jan	Dec
F8	Zanzibar Hotel	50	35	85	-	N	Jan	Dec
F9	Chobe Game Lodge	73	12	84	1	N	Jan	Dec
b.	**FIXED CAMPS**							
F10	Chanoga Fishing & Photo Safaris	85	-	85	-	N	Jan	Dec
F11	Chobe Chilweru	84	1	84	1	Y	Jan	Dec
F12	Circle Holdings (Jwala Game Lodge)	82	3	82	3	N	Jan	Dec
F13	Northwest Holdings (Delta & Oddballs)	76	9	82	3	Y	Jan	Dec
F14	Desert & Delta Safaris	82	3	82	3	N	Apr	Nov
F15	Gametrackers	72	13	82	3	Y	Jan	Dec
F16	Lloyds Camp	80	5	80	5	Y	Feb	Nov
F17	Moremi Safaris	78	7	78	7	Y	Jan	Dec
F18	Ntswi Safaris	82	3	82	3	Y	Apr	Oct
F19	Nxamaseri Fishing Camp	82	3	82	3	Y	Mar	Nov
F20	Okavango Explorations (Xugana)	76	9	82	3	Y	Jan	Dec
F21	Okavango Fishing Safaris	69	16	77	8	Y	Jan	Dec
F22	Mashatu Game Lodges	81	4	84	1	Y	Jan	Dec
F23	Sitatunga Camping Safaris	84	1	84	1	Y	Jan	Dec
F24	Stevensford Safaris	76	9	76	9	Y	Jan	Dec
F25	Tsaro	83	2	83	2	Y	Mar	Dec
F26	Xaxaba Safaris	72	13	82	3	Y	Jan	Dec
c.	**HUNTING COMPANIES/SAFARI OUTFITTERS**							
H1	Bird Safaris	82	3	82	3	N	May	Oct
H2	Hunter's Africa	69	16	83	2	N	Mar	Nov
H3	Jao Safaris	84	1	84	1	N	Mar	Nov
H4	Kerr, Downey & Selby	69	16	75	10	N	Mar	Nov
H5	Micheletti Bates	64	21	84	1	N	Mar	Nov
H6	Vira Safaris	79	6	79	6	N	Mar	Nov
H7	Safari South	62	23	75	10	N	Mar	Nov
H8	Kalahari Desert Safaris	85	-	85	-	N	Mar	Nov

APPENDIX J. 4.B. COMPANY HISTORY AND SEASONALITY

MOBILE OPERATORS

REF	COMPANY NAME	1 YEAR ESTABLISHED	2 YEARS IN OPERATION	3 TAKEN OVER BY CURRENT OWNER IN	4 YEARS WITH CURRENT OWNER	5 MEMBER OF HATAB	6 SEASON FROM	7 SEASON TO
d.	MOBILE OPERATORS BOTSWANA REGISTERED - FOREIGN BASED							
M1	Afroventure Safaris	73	12	73	12	Y	Jan	Dec
M2	Educational Wildlife Expeditions	76	9	76	9	Y	Apr	Oct
M3	Karibu Safaris	83	2	83	2		Jan	Dec
M4	Penduka Safaris	68	17	68	17	Y	Jan	Oct
M5	Quest Africa	80	5	80	5	Y	Jan	Dec
M6	S A Safaris	84	1	84	1	N	Apr	Dec
e.	MOBILE OPERATORS FOREIGN REGISTERED & BASED							
M7	Adventure Organisers	83	2	83	2		Mar	Oct
M8	Backtrackers	85	-	85	-		Jan	Dec
M9	Drifters	84	1	84	1		May	Sept
M10	Encounter Overland	85	-	85	-		Jan	Dec
M11	Get Lost	77	8	77	8	N	Mar	Nov
M12	Guerba Expeditions	85	-	85	-		Jan	Dec
M13	Rotel Tours	83	2	83	2		Jan	Dec
M14	Southern Cross Safaris	85	-	85	-		Jan	Dec
M15	Trailblazers	80	5	80	5		Jun	Sept
M16	Trail Promotions	83	2	83	2		Jan	Dec
M17	World Expeditions	No data available						
M18	Sobek Expeditions	No data available						
M19	Adventure del Mondo	No data available						
f.	MOBILE OPERATORS BOTSWANA REGISTERED - BOTSWANA BASED							
M20	Bahati	83	2	83	2	Y	Mar	Nov
M21	Buffalo Trails	85	-	85	-	nda	nda	nda
M22	Chobe Game Safaris	83	2	83	2	N	Jan	Dec
M23	Gamerovers Botswana	82	3	82	3	Y	Mar	Oct
M24	Holiday Safaris	71	14	71	14	Y	Mar	Nov
M25	Kalahari Photographic Expeditions	84	1	84	1	Y	Apr	Nov
M26	Kitso	79	6	79	6	Y	Apr	Oct
M27	Okavango Wilderness Safaris	84	1	84	1	Y	Jan	Dec
M28	Okuti Safaris	81	4	81	4	N	Mar	Dec
M29	Botswana Safaris Unlimited	70	15	70	15	Y	Jan	Oct
M30	Transokavango	85	-	85	-	nda	nda	nda
M31	Okavango Studentenreisen	80	5	80	5	N	Mar	Oct
M32	Capricorn Safaris Botswana	84	1	85	-	nda	nda	nda

APPENDIX J.5.A. INCOME; PROMOTIONAL EXPENSES; CAPITAL INVESTED; FUTURE PLANS

SAFARI LODGES / FIXED CAMPS / SAFARI OUTFITTERS

REF	8 TOTAL INCOME	9 PROMOTIONAL COSTS PERSONAL	10 BROCH/AD	11 TOTAL	76 CAPITAL INVESTED TO DATE	77 JOBS TO BE CREATED	78 FUTURE CAPITAL INVESTMENT
a. SAFARI LODGES							
F1	0	0	0	0	110,000	19	110,000
F2	100,000	0	0	0	100,000		
F3	140,000	0	0	0	212,000	4	
F4	156,600	0	1,452	1,452	124,887	3	35,000
F5	0	0	0	0	0	8	50,000
F6	nda	0	0	0	0	0	0
F7	75,320	0	7,000	7,000	1,000,000	10	200,000
F8	14,400	nda	nda	0		10	
F9	1,500,000	0	144,000	144,000	6,880,000	30	250,000
Sub-total a.	1,986,320	0	152,452	152,452	8,426,887	84	645,000
b. FIXED CAMPS							
F10	0	0	0	0		16	50,000
F11	32,300	15,000	0	15,000	135,000		
F12	15,300	0	1,800	1,800	300,000		
F13	440,000	0	1,000	1,000	220,250	0	
F14	200,475	25,000	15,000	40,000	400,000	15	350,000
F15	1,411,376	33,120	253,183	286,303	1,090,000		291,000
F16	150,000	0	0	0	139,000	10	30,000
F17	116,000	0	0	0	105,400		
F18	24,000	0	0	0	21,000	6	30,000
F19	120,000	0	0	0	119,950	8	60,000
F20	320,000	0	25,000	25,000	700,000	8	300,000
F21	50,000	0	0	0	750,000		75,000
F22	150,000	0	90,000	90,000	2,500,000		
F23	70,000	5,800	15,000	20,800	129,000		
F24	25,000	0	2,500	2,500	184,500	5	
F25	72,000	10,000	40,000	50,000	500,000		
F26	500,000	20,000	30,000	50,000	411,900		
Sub-total b.	3,696,451	108,920	473,483	582,403	7,706,000	68	1,186,000
Total a. + b.	5,682,771	108,920	625,935	734,855	16,132,887	152	1,831,000
c. HUNTING Coys.							
H1	300,000	8,000	0	8,000	226,000		80,000
H2	1,200,000	100,000		100,000	1,000,000	30	150,000
H3	0	0	0	0	0	30	150,000
H4	0	0	0	0			
H5	500,000	0	0	0	409,000	30	40,000
H6	220,000	10,000	0	10,000	148,300		
H7	1,760,000	60,000	100,000	160,000	1,690,000		
H8	0	0	0	0			
Sub-total c.	3,980,000	178,000	100,000	278,000	3,473,300	90	420,000
TOTAL a+b+c.	9,662,771	286,920	725,935	1,012,855	19,606,187	242	2,251,000

APPENDIX J.5.B. INCOME; PROMOTIONAL EXPENSES; CAPITAL INVESTED; FUTURE PLANS

MOBILE OPERATORS

REF	8 TOTAL INCOME	9 PROMOTIONAL COSTS PERSONAL	10 BROCH/AD	11 TOTAL	76 CAPITAL INVESTED TO DATE	77 JOBS TO BE CREATED	78 FUTURE CAPITAL INVESTMENT
d. MOBILES BOTS.REG./FOR'N							
M1	290,285	15,000	70,000	85,000	0	2	0
M2	51,000	0	15,000	15,000	3,000	10	40,000
M3	14,595	0	0	0	0		
M4	56,400	0	16,500	16,500	0		
M5	38,192	0	0	0	58,200	6	30,000
M6	51,804	0	7,500	7,500	0	4	0
Sub-total d.	502,276	15,000	109,000	124,000	61,200	22	70,000
e. MOBILES FOR'N REG/BASE							
M7	9,248			0			
M8	nda			0			
M9	29,840			0			
M10				0			
M11	54,962			0		8	80,000
M12	19,910			0			
M13	15,632			0			
M14				0			
M15	27,350			0			
M16				0			
M17	nda			0			
M18	nda			0			
M19	nda			0			
Sub-total e.	156,942	0	0	0	0	8	80,000
f. MOBILES BOTS.REG'D & BASE							
M20	47,630	0	0	0	16,100	1	10,000
M21	nda						
M22	48,000	0	0	0	nda	5	41,000
M23	32,000	2,000	350	2,350	26,900		
M24	98,404	6,117	120	6,237	111,400	8	30,000
M25	45,600	0	15,000	15,000	45,660	46	350,000
M26	48,000	3,500	0	3,500	92,100	3	3,500
M27	240,000	4,000	6,000	10,000	78,000		
M28	45,000	0	4,000	4,000	73,500	9	55,000
M29	155,000	35,000	0	35,000	750,000		
M30	nda						
M31	30,340	0	0	0	200,200		
M32	nda			0			
Sub-total f.	789,974	50,617	25,470	76,087	1,393,860	72	489,500
TOTAL d+e+f	1,449,192	65,617	134,470	200,087	1,455,060	102	639,500

APPENDIX J.6.A. CLIENT DATA

SAFARI LODGES / FIXED CAMPS / SAFARI OUTFITTERS

REF	12 NUMBER OF CLIENTS PERMANENT	13 CAMPING	14 TOTAL	15 PERCENTAGES OF CLIENTS FROM: NORTH AMERICA	16 EUROPE	17 S.AFRICA	18 OTHER AREAS	19 ESTIMATED NUMBERS OF CLIENTS FROM: NORTH AMERICA	20 EUROPE	21 SOUTH AFRICA	22 OTHER AREAS
a. SAFARI LODGES											
F1	0	0	0	0	0	0	0	0	0	0	0
F2	1,044	nda	1,044	0	10	80	10	0	104	836	104
F3	750	10,950	11,700	0	50	50	0	0	5,850	5,850	0
F4	842	3,650	4,492	0	0	90	10	0	0	4,043	449
F5	0	0	0	0	0	0	0	0	0	0	0
F6	0	0	0	0	0	0	0	0	0	0	0
F7	800	0	800	0	0	50	50	0	0	400	400
F8	144	0	144				100	0	0	0	144
F9	2,448	0	2,448	20	20	40	20	490	490	979	490
Sub-total a.	6,028	14,600	20,628	2	31	59	8	490	6,444	12,108	1,587
b. FIXED CAMPS											
F10	0	0	0	0	0	0	0	0	0	0	0
F11	200	0	200	0	0	0	0	0	0	200	0
F12	100	0	100	0	0	100	0	0	0	100	0
F13	300	1,300	1,600	0	20	80	0	0	320	1,280	0
F14	330	0	330	95	0	0	5	313	0	0	17
F15	1,200	0	1,200	45	12	28	15	540	144	336	180
F16	650	0	650	17	28	55	0	110	182	359	0
F17	260	0	260	50	0	0	50	130	0	0	130
F18	115	0	115	0	0	100	0	0	0	115	0
F19	354	0	354	50	0	50	0	177	0	177	0
F20	790	0	790	60	0	40	0	474	0	316	0
F21	73	nda	73	10	10	80	0	7	7	58	0
F22	800	0	800	0	0	100	0	0	0	800	0
F23	1,506	nda	1,506	0	10	90	0	0	150	1,356	0
F24	150	0	150	0	0	50	50	0	0	75	75
F25	106	0	106	0	25	75	0	0	26	80	0
F26	3,640	1,000	4,640	31	34	35	0	1,438	1,577	1,625	0
Sub-total b.	10,574	2,300	12,874	25	19	52	3	3,190	2,406	6,877	402
Total a. + b.	16,602	16,900	33,502	11	26	56	6	3,679	8,850	18,985	1,989
c. HUNTING Coys.											
H1	50	0	50	90	10	0	0	45	5	0	0
H2	110	0	110	80	10	2	8	88	11	2	9
H3	0	0	0	0	0	0	0	0	0	0	0
H4	0	0	0	0	0	0	0	0	0	0	0
H5	50	0	50	90	10	0	0	45	5	0	0
H6	27	0	27	95	5	0	0	26	1	0	0
H7	140	0	140	80	18	2	0	112	25	3	0
H8	0	0	0	0	0	0	0	0	0	0	0
Sub-total c.	377	0	377	84	13	1	2	316	48	5	9
TOTAL a+b+c.	16,979	16,900	33,879	12	26	56	6	3,995	8,898	18,990	1,998

APPENDIX J.6.B. CLIENT DATA

MOBILE OPERATORS

REF	12 NUMBER OF CLIENTS PERMANENT	13 CAMPING	14 TOTAL	15 PERCENTAGES OF CLIENTS FROM: NORTH AMERICA	16 EUROPE	17 S.AFRICA	18 OTHER AREAS	19 ESTIMATED NUMBERS OF CLIENTS FROM: NORTH AMERICA	20 EUROPE	21 SOUTH AFRICA	22 OTHER AREAS
d. MOBILES BOTS.REG./FOR'N											
M1	982	0	982	20	15	50	15	196	147	491	147
M2	189	0	189	10	10	75	5	19	19	142	10
M3	49	0	49	0	100	0	0	0	49	0	0
M4	135	0	135	13	13	75	0	18	18	100	0
M5	135	0	135	0	0	100	0	0	0	135	0
M6	109	0	109	0	0	100	nda	0	0	109	0
Sub-total d.	1,599	0	1,599	15	15	61	10	233	233	977	157
e. MOBILES FOR'N REG/BASE											
M7	28	0	28	0	0	100	0	0	0	28	0
M8	nda	0	0	0	0	0	0	0	0	0	0
M9	80	0	80	0	0	100	0	0	0	80	0
M10	nda	0	0	0	0	0	0	0	0	0	0
M11	99	0	99	0	0	100	0	0	0	99	0
M12	210	0	210	0	50	50	0	0	105	105	0
M13	400	0	400	0	100	0	0	0	400	0	0
M14	nda	0	0	0	0	0	0	0	0	0	0
M15	80	0	80	0	0	100	0	0	0	80	0
M16	10	0	10	0	0	100	0	0	0	10	0
M17	nda	0	0	0	0	0	0	0	0	0	0
M18	nda	0	0	0	0	0	0	0	0	0	0
M19	nda	0	0	0	0	0	0	0	0	0	0
Sub-total e.	907	0	907	0	56	44	0	0	505	402	0
f. MOBILES BOTS.REG'D & BASE											
M20	53	0	53	20	60	20	0	11	32	11	0
M21	nda	0	0	nda	nda	nda	nda	nda	nda	nda	nda
M22	nda	0	0	0	0	0	0	0	0	0	0
M23	80	0	80	30	0	40	30	24	0	32	24
M24	28	0	28	90	10	0	0	25	3	0	0
M25	100	0	100	0	0	100	0	0	0	100	0
M26	103	0	103	0	0	100	0	0	0	103	0
M27	232	0	232	20	10	60	10	46	23	139	23
M28	90	0	90	0	100	0	0	0	90	0	0
M29	100	0	100	5	95	0	0	5	95	0	0
M30	0	0	0	0	0	0	0	0	0	0	0
M31	50	0	50	0	100	0		0	50	0	0
M32	nda	0	0	0		0		0	0	0	0
Sub-total f.	836	0	836	13	35	46	6	111	293	385	47
TOTAL d+e+f	3,342	0	3,342	10	31	53	6	344	1,031	1,764	204

APPENDIX J.7.
NUMBERS OF CAMPING TRIPS
IN BOTSWANA

N.B. SAFARI LODGES, FIXED CAMPS & HUNTING COMPANY ACTIVITIES ARE NOT INCLUDED

REF		23 NUMBER OF TRIPS
d. MOBILES BOTS.REG./FOR'N		
M1		70
M2		30
M3		7
M4		10
M5		35
M6		17
Sub-total d.		169
e. MOBILES FOR'N REG/BASE		
M7		2
M8	nda	
M9		5
M10	nda	
M11		22
M12		9
M13		11
M14		9
M15		5
M16	nda	
M17	nda	
M18	nda	
M19	nda	
Sub-total e.		63
f. MOBILES BOTS.REG'D & BASE		
M20		nda
M21		nda
M22		nda
M23		18
M24		7
M25		8
M26		16
M27		nda
M28		10
M29		9
M30		0
M31		10
M32		nda
Sub-total f.		78
TOTAL d+e+f		310

APPENDIX J. 8.A.EMPLOYEE DATA

SAFARI LODGES / FIXED CAMPS / SAFARI OUTFITTERS

REF	24 TOTAL FULLTIME STAFF	25 NUMBER OF BATSWANA	26 WAGES PAID CASUALS	27 WHERE CASUALS EMPLOYED	28 WAGES PAID BATSWANA	29 VALUE OF FOOD SUPPLIED	30 VALUE OF UNIFORMS SUPPLIED	31 OTHER BENEFITS	32 VALUE OF MEAT SUPPLIED	33 ESTIMATE OF TIPS RECEIVED	34 TOTAL VALUE RECEIVED
a. SAFARI LODGES											
F1	0	0	0		0	0	0	0		0	0
F2	15	13	0		19,920	520	450	0		310	21,200
F3	22	19	2,450	Maun	24,200	0	200	0		752	27,602
F4	25	23	0		56,270	0	2,000	0		3,036	61,306
F5	0	0	0		0	0	0	0		0	0
F6	0	0	0		0	0	0	0	0	0	0
F7	36	32	0		72,600	2,160	1,300	0			76,060
F8	6	6	0		7,680	1,800	100				9,580
F9	74	65	0		304,455	93,886	0	0		nda	398,341
Sub-total a.	178	158	2,450	0	485,125	98,366	4,050	0	0	4,098	594,089
b. FIXED CAMPS											
F10	0	0	0		0	0	0	0	0	0	0
F11	9	7	0		25,440	8,160	210	0		0	33,810
F12	12	12	3,640	Tuli	6,000	5,280	188	0		100	15,208
F13	16	11	4,021	Delta	32,280	17,000	425	0		2,000	55,726
F14	17	15	0		46,800	8,250	5,100	0		nda	60,150
F15	72	50	0		479,511	80,040	3,444	65,516		18,418	646,929
F16	8	7	0		17,319	2,880	550	0		1,306	22,055
F17	8	7	0		12,080	3,430	175	0		2,283	17,968
F18	2	2	0		4,900	2,800	100	0		280	8,080
F19	8	8	320	Nxamaseri	7,234	1,095	160	0		1,646	10,455
F20	16	13	0		57,500	5,460	520	0		5,000	68,480
F21	6	6	2,520		7,329	1,800	822	0		1,000	13,471
F22	15	12	0		36,030	13,464	980	0		2,400	52,874
F23	15	15	0		27,300	1,575	375	0		1,334	30,584
F24	15	15	1,000	Tuli	6,000	3,500	840	0		nda	11,340
F25	11	8	500		26,400	1,750	315	0		560	29,525
F26	43	35	15,000		85,000	14,676	2,000	0		400	117,076
Sub-total b.	273	223	27,001	0	877,123	171,160	16,204	65,516	0	36,727	1,193,731
Total a. + b.	451	381	29,451	0	1,362,248	269,526	20,254	65,516	0	40,825	1,787,820
c. HUNTING Coys.											
H1	25	24	0		80,522	11,040	504	0		nda	92,066
H2	170	162	0		603,950	69,600	5,440	8,200	53,805	1,190	742,185
H3	0	0	0		0	0	0	0	nda	0	0
H4	0	0	0		0	0	0	0	nda	0	0
H5	37	33	0		152,424	16,080	986	0	60,486		229,976
H6	14	14	0		20,000	4,800	1,500	0	11,901	2,250	40,451
H7	130	124	7,000		354,000	14,000	5,000	0	63,789	23,000	466,789
H8	0	0	0		0	0	0	0	nda	0	0
Sub-total c.	376	357	7,000	0	1,210,896	115,520	13,430	8,200	189,981	26,440	1,571,467
TOTAL a+b+c.	827	738	36,451	0	2,573,144	385,046	33,684	73,716	189,981	67,265	3,359,287

APPENDIX J. 8.B.EMPLOYEE DATA

MOBILE OPERATORS

REF	24 TOTAL FULLTIME STAFF	25 NUMBER OF BATSWANA	26 WAGES PAID CASUALS	27 WHERE CASUALS EMPLOYED	28 WAGES PAID BATSWANA	29 VALUE OF FOOD SUPPLIED	30 VALUE OF UNIFORMS SUPPLIED	31 OTHER BENEFITS	32 VALUE OF MEAT SUPPLIED	33 ESTIMATE OF TIPS RECEIVED	34 TOTAL VALUE RECEIVED
d. MOBILES BOTS.REG./FOR'N											
M1	0		0								0
M2	0		0								0
M3	0		0							1,680	1,680
M4	0		500	Kalahari						2,000	2,500
M5	4	4	0		4,080	100	400	0		2,025	6,605
M6	0		0								0
Sub-total d.	4	4	500	0	4,080	100	400	0	0	5,705	10,785
e. MOBILES FOR'N REG/BASE											
M7	0		0								0
M8	0		0								0
M9	0		0								0
M10	0		0								0
M11	0		0								0
M12	0		0								0
M13	0		0								0
M14	0		0								0
M15	0		0								0
M16	0		0								0
M17	0		0								0
M18	0		0								0
M19	0		0								0
Sub-total e.	0	0	0	0	0	0	0	0	0	0	0
f. MOBILES BOTS.REG'D & BASE											
M20	nda		100	Maun							100
M21	nda		0								0
M22	3	3	0		30,000	0	68			nda	30,068
M23	2	2	0		2,160	720	0			0	2,880
M24	5	5	0		3,800	0	0	1,774		0	5,574
M25	0	0	0		0	0	0			0	0
M26	4	3	nda	Maun	4,260	0	75			nda	4,335
M27	2	2	0		1,980	720	200			3,480	6,380
M28	1	1	1,340	Maun	2,340	0	0			0	3,680
M29	16	14	1,500	Maun	21,000	20,250	500			0	43,250
M30	nda		0							0	0
M31	6	2	0		16,440						16,440
M32	nda		0								0
Sub-total f.	39	32	2,940		81,980	21,690	843	1,774	0	3,480	112,707
TOTAL d+e+f	43	36	3,440		86,060	21,790	1,243	1,774	0	9,185	123,492

APPENDIX J. 9.A. CATERING COSTS

SAFARI LODGES / FIXED CAMPS / SAFARI OUTFITTERS

REF	35 FOOD PURCHASES - STAFF	36 FOOD PURCHASES - CLIENTS	37 LIQUOR PURCHASED	38 TOTAL CATERING COSTS
a. SAFARI LODGES				
F1	0	0	0	0
F2	520	10,114	206	10,840
F3	0	30,000	15,500	45,500
F4	0	37,200	31,200	68,400
F5	0	0		0
F6	0	0	0	0
F7	2,160	0	0	2,160
F8	1,800			1,800
F9	93,886	51,114	150,000	295,000
Sub-total a.	98,366	128,428	196,906	423,700
b. FIXED CAMPS				
F10	0	0		0
F11	8,160	3,168	3,600	14,928
F12	5,280	nda		5,280
F13	17,000	22,786	18,000	57,786
F14	8,250	10,000	3,300	21,550
F15	80,040	92,020	37,800	209,860
F16	2,880	8,500	16,000	27,380
F17	3,430	12,000	nda	15,430
F18	2,800	11,287	3,450	17,537
F19	1,095	13,000	2,500	16,595
F20	5,460	6,660	4,425	16,545
F21	1,800	7,623	3,766	13,189
F22	13,464	0	0	13,464
F23	1,575	25,350	17,367	44,292
F24	3,500	1,500	0	5,000
F25	1,750	10,000	9,000	20,750
F26	14,676	42,741	44,325	101,742
Sub-total b.	171,160	266,635	163,533	601,328
Total a. + b.	269,526	395,063	360,439	1,025,028
c. HUNTING Coys.				
H1	11,040	13,000	15,043	39,083
H2	69,600	64,600	50,000	184,200
H3	0	0	0	0
H4	0	0	0	0
H5	16,080	15,000	10,000	41,080
H6	4,800	10,000	4,000	18,800
H7	14,000	67,000	49,200	130,200
H8	0	0	0	0
Sub-total c.	115,520	169,600	128,243	413,363
TOTAL a+b+c.	385,046	564,663	488,682	1,438,391

APPENDIX J. 9.B. CATERING COSTS

MOBILE OPERATORS

REF	35 FOOD PURCHASES - STAFF	36 FOOD PURCHASES - CLIENTS	37 LIQUOR PURCHASED	38 TOTAL CATERING COSTS
d. MOBILES BOTS.REG./FOR'N				
M1		55,000	30,000	85,000
M2		0	9,000	9,000
M3		1,400	1,715	3,115
M4		8,800	2,700	11,500
M5	100	1,000	2,400	3,500
M6		17,000	10,200	27,200
Sub-total d.	100	83,200	56,015	139,315
e. MOBILES FOR'N REG/BASE				
M7		700	nda	700
M8				0
M9		4,000	2,400	6,400
M10				0
M11		332	2,520	2,852
M12		1,890	4,200	6,090
M13		7,052	4,800	11,852
M14				0
M15		5,000	5,000	10,000
M16				0
M17				0
M18				0
M19				0
Sub-total e.	0	18,974	18,920	37,894
f. MOBILES BOTS.REG'D & BASE				
M20		3,600	2,000	5,600
M21	nda	nda	nda	nda
M22	0	0	0	0
M23	720	5,000	1,500	7,220
M24	0	18,359	3,985	22,344
M25	0	5,500	1,920	7,420
M26	0	7,200	2,725	9,925
M27	720	10,800	9,600	21,120
M28	0	15,000	4,050	19,050
M29	20,250	20,000	7,000	47,250
M30	nda	0	0	nda
M31		3,000	3,000	6,000
M32	nda			nda
Sub-total f.	21,690	88,459	35,780	145,929
TOTAL d+e+f	21,790	190,633	110,715	323,138

APPENDIX J. 10.A. TRANSPORT COSTS

SAFARI LODGES / FIXED CAMPS / SAFARI OUTFITTERS

REF	39 NUMBER OF VEHICLES	40 NUMBER OF BOATS	41 V+B+G * FUEL/OIL	42 VEHICLE REPAIR COSTS	43 OTHER VEHICLE COSTS	44 AIRCRAFT FUEL COSTS	45 AIRCRAFT MAINT' COSTS	46 OTHER AIRCRAFT COSTS	47 TOTAL TRANSPORT COSTS
a. SAFARI LODGES									
F1	0	0	0	0	0	0	0	0	0
F2	0	0	4,426	0	0	0		0	4,426
F3	2	6	9,450	0	0	0		0	9,450
F4	5	5	28,153	0	0	0	12,299	0	40,452
F5	0	0	0	0	0	0		0	0
F6	0	0	0	0	0	0	0	0	0
F7	5	1	0	0	0	0		0	0
F8	0	0	0	0	0	0	0	0	0
F9	4	6	112,000	0	8,000	0		0	120,000
Sub-total a.	16	18	154,029	0	8,000	0	12,299	0	174,328
b. FIXED CAMPS									
F10	0	0	0	0	0	0		0	0
F11	4	1	20,720	0	0	0		0	20,720
F12	0	0	0	0	0	0		0	0
F13	6	3	5,773	nda	0	0		0	5,773
F14	3	6	20,972	1,152	0	0		0	22,124
F15	23	0	79,606	16,640	49,108	0		0	145,354
F16	4	3	23,375	2,000	0	0		1,500	26,875
F17	5	2	9,000	3,000	1,053	0		0	13,053
F18	1	2	400	0	0	4,000		200	4,600
F19	3	4	SWA	1,200	0	0		0	1,200
F20	3	5	15,300	300	0	5,400		0	21,000
F21	6	6	SWA	779	50	2,516		1,543	4,888
F22	0	0	0	0	0	0		0	0
F23	3	6	21,454	3,200	0	0		0	24,654
F24	11	2	1,947	0	0	0		0	1,947
F25	4	1	12,000	nda	0	0		0	12,000
F26	4	nda	29,986	5,000	0	37,201	22,041	0	94,228
Sub-total b.	80	41	240,533	33,271	50,211	49,117	22,041	3,243	398,416
Total a. + b.	96	59	394,562	33,271	58,211	49,117	34,340	3,243	572,744
c. HUNTING Coys.									
H1	9	1	50,000	nda	0	0		0	50,000
H2	25	8	90,000	11,000	20,731	0		0	121,731
H3	0	0	0	0	0	0		0	0
H4	0	0	0	0	0	0		0	0
H5	15	3	31,000	11,148	4,264	0		0	46,412
H6	5	0	14,000	10,000	0	3,000		0	27,000
H7	7	5	96,088	15,000	18,000	0	12,500	0	141,588
H8	0	0	0	0	0	0		0	0
Sub-total c.	61	17	281,088	47,148	42,995	3,000	12,500	0	386,731
TOTAL a+b+c.	157	76	675,650	80,419	101,206	52,117	46,840	3,243	959,475

*Vehicles /Boats /Generators

APPENDIX J. 10.B. TRANSPORT COSTS

MOBILE OPERATORS

REF	39 NUMBER OF VEHICLES	40 NUMBER OF BOATS	41 V+B+G * FUEL/OIL	42 VEHICLE REPAIR COSTS	43 OTHER VEHICLE COSTS	44 AIRCRAFT FUEL COSTS	45 AIRCRAFT MAINT' COSTS	46 OTHER AIRCRAFT COSTS	47 TOTAL TRANSPORT COSTS
d. MOBILES BOTS.REG./FOR'N									
M1			45,000	6,000			2,000		53,000
M2			0	0	8,855	4,500			13,355
M3			2,450	4,000	420				6,870
M4			16,000	0	6,100				22,100
M5	2	2	5,000	3,050	7,312	3,750		500	19,612
M6			8,500	0	3,400				11,900
Sub-total d.	2	2	76,950	13,050	26,087	8,250	2,000	500	126,837
e. MOBILES FOR'N REG/BASE									
M7			2,000	100					2,100
M8									0
M9			6,000	1,000					7,000
M10									0
M11						2,145	0	440	2,585
M12			2,500		1,260				3,760
M13			7,200		3,780				10,980
M14									0
M15			1,250		14,000				15,250
M16									0
M17									0
M18									0
M19									0
Sub-total e.	0	0	18,950	1,100	19,040	2,145	0	440	41,675
f. MOBILES BOTS.REG'D & BASE									
M20	1		2,800	0					2,800
M21	nda	nda	nda	nda	nda	nda	nda	nda	0
M22	5		12,000	6,000	1,000				19,000
M23	1		2,000	200					2,200
M24	5	0	15,073	3,190	4,454		12,451		35,168
M25	2		14,000	2,000					16,000
M26	4		5,000	nda			100		5,100
M27	3		14,400	6,000					20,400
M28	0		8,000	0					8,000
M29	6		6,000	1,000		9,000		50	16,050
M30	nda		0	0					0
M31	nda		3,000	1,800					4,800
M32	nda								0
Sub-total f.	27	0	82,273	20,190	5,454	9,000	12,551	50	129,518
TOTAL d+e+f	29	2	178,173	34,340	50,581	19,395	14,551	990	298,030

*Vehicles /Boats /Generators

APPENDIX J. 11.A. PAYMENTS TO SECONDARY BUSINESS

SAFARI LODGES / FIXED CAMPS / SAFARI OUTFITTERS

REF	48 PRINTING COSTS	49 AIR CHARTER	50 BANKING COSTS	51 ACC/TAX LEGAL SERVICES	52 SECRET-ARIAL SERVICES	53 INSUR-ANCE COSTS	54 TOTAL SERVICE COSTS
a. SAFARI LODGES							
F1	0	0	0	0	0	0	0
F2	0		420	1,500		0	1,920
F3	nda		320	1,500		0	1,820
F4	0		735	1,425		0	2,160
F5	nda					0	0
F6	0	0	0	0	0	0	0
F7	nda			2,000		0	2,000
F8	nda						0
F9	0		17,400			12,000	29,400
Sub-total a.	0	0	18,875	6,425	0	12,000	37,300
b. FIXED CAMPS							
F10						0	0
F11	800		24,000	1,000		850	26,650
F12	0			6,000		0	6,000
F13	0		250	nda		0	250
F14	0		nda	6,000		0	6,000
F15	9,200	221,616	174,418	4,800	27,838	0	437,872
F16	0		3,139	3,700	410	1,100	8,349
F17	0		1,028	1,600		0	2,628
F18	0		950	900	800	0	2,650
F19	150		0	2,000		0	2,150
F20	0		4,800	2,500		144	7,444
F21	0		346	1,528		0	1,874
F22	nda					0	0
F23			2,500	nda	3,000	0	5,500
F24			2,436	2,829	1,200	0	6,465
F25			360	2,000	3,000	0	5,360
F26	2,000		3,240	9,700	6,000	0	20,940
Sub-total b.	12,150	221,616	217,467	44,557	42,248	2,094	540,132
Total a. + b.	12,150	221,616	236,342	50,982	42,248	14,094	577,432
c. HUNTING Coys.							
H1	0	30,000	600	nda		1,000	31,600
H2	3,000	60,000	8,400	1,400		8,000	80,800
H3	nda					0	0
H4	nda					0	0
H5	1,500	13,000	813	3,000		0	18,313
H6	0	6,000		1,600	180	3,500	11,280
H7	0	169,000	5,000	13,000	1,300	1,400	189,700
H8	nda					0	0
Sub-total c.	4,500	278,000	14,813	19,000	1,480	13,900	331,693
TOTAL a+b+c.	16,650	499,616	251,155	69,982	43,728	27,994	909,125

APPENDIX J. 11.B. PAYMENTS TO SECONDARY BUSINESS

MOBILE OPERATORS

REF	48 PRINTING COSTS	49 AIR CHARTER	50 BANKING COSTS	51 ACC/TAX LEGAL SERVICES	52 SECRET- ARIAL SERVICES	53 INSUR- ANCE COSTS	54 TOTAL SERVICE COSTS
d. MOBILES BOTS.REG./FOR'N							
M1		50,000		3,000			53,000
M2		0		280	100		380
M3		3,780		0			3,780
M4		4,500		1,000			5,500
M5		0	240	1,000		750	1,990
M6		6,540		0			6,540
Sub-total d.	0	64,820	240	5,280	100	750	71,190
e. MOBILES FOR'N REG/BASE							
M7		1,680					1,680
M8							0
M9		4,800					4,800
M10							0
M11							0
M12		6,300					6,300
M13							0
M14							0
M15							0
M16							0
M17							0
M18							0
M19							0
Sub-total e.	0	12,780	0	0	0	0	12,780
f. MOBILES BOTS.REG'D & BASE							
M20	100		150	900			1,150
M21	nda						0
M22	0		0	0			0
M23	0		nda	2,500			2,500
M24	1,884		3,418	2,353			7,655
M25	600		60	2,420			3,080
M26	0		nda	500		680	1,180
M27			0	3,000		3,000	6,000
M28		6,500	nda	500			7,000
M29			nda	3,000			3,000
M30	nda						0
M31							0
M32							0
Sub-total f.	2,584	6,500	3,628	15,173	0	3,680	31,565
TOTAL d+e+f	2,584	84,100	3,868	20,453	100	4,430	115,535

APPENDIX J. 12.A. TRANSACTIONS WITH THE INFORMAL SECTOR

SAFARI LODGES / FIXED CAMPS / SAFARI OUTFITTERS

REF	55 HANDI-CRAFTS PURCHASED	56 PRODUCTS PURCHASED	57 WHERE PURCHASED	58 PAID FOR MAKOROS	59 TIPS TO MAKORO POLERS	60 WHERE PAID	61 TOTAL TO MOKORO POLERS	62 TOTAL TO INFORMAL SECTOR
a. SAFARI LODGES								
F1	0			0	0	0	0	0
F2	800			0	0		0	800
F3	0	1,000	Maun	650		Maun	650	1,650
F4	420			5,700	nda	Maun	5,700	6,120
F5	0	1,000	Maun	0	0		0	1,000
F6	0	0	0	0	0	0	0	0
F7	500	2,700	Shorobe	0	0		0	3,200
F8	nda							0
F9	1,000			0	0		0	1,000
Sub-total a.	2,720	4,700	0	6,350	0	0	6,350	13,770
b. FIXED CAMPS								
F10	0	3,500		0	0		0	3,500
F11	0	14,000	Kasane	0	0		0	14,000
F12	2,000			0	0		0	2,000
F13	3,000	2,000	Maun	16,958	3,000	Delta	19,958	24,958
F14	0	6,600	Maun	0	0		0	6,600
F15	3,000	10,000	Kachikau	0	0		0	13,000
F16	0			0	0		0	0
F17	0			0	0		0	0
F18	0	2,000	Moremi	1,207	700	Moremi	1,907	3,907
F19	1,950	1,590	Nxamaseri	80	0	Nxamaseri	80	3,620
F20	0			0	0		0	0
F21	480	3,120	Shakawe	0	0		0	3,600
F22	2,400			0	0		0	2,400
F23	1,350	20,000	Etsha	0	0		0	21,350
F24	400	3,000	Tuli	0	0		0	3,400
F25	0	3,500	Sankuwi	0	0		0	3,500
F26	2,400	7,000	Quaakwa	34,000		Xaxaba	34,000	43,400
Sub-total b.	16,980	76,310	0	52,245	3,700	0	55,945	149,235
Total a. + b.	19,700	81,010	0	58,595	3,700	0	62,295	163,005
c. HUNTING Coys.								
H1	0			0	0		0	0
H2	0	2,500	Kachikau	0	0		0	2,500
H3	0			0	0		0	0
H4	0			0	0		0	0
H5	0	4,000	Maun	0	0		0	4,000
H6	4,000	2,000	Desert	0	0		0	6,000
H7	0	3,500	Shorobe,	1,500	0	Matsebe	1,500	5,000
H8	nda			0	0		0	0
Sub-total c.	4,000	12,000	0	1,500	0	0	1,500	17,500
TOTAL a+b+c.	23,700	93,010	0	60,095	3,700	0	63,795	180,505

APPENDIX J. 12.B. TRANSACTIONS WITH THE INFORMAL SECTOR

MOBILE OPERATORS

REF	55 HANDI-CRAFTS PURCHASED	56 PRODUCTS PURCHASED	57 WHERE PURCHASED	58 PAID FOR MAKOROS	59 TIPS TO MAKORO POLERS	60 WHERE PAID	61 TOTAL TO MOKORO POLERS	62 TOTAL TO INFORMAL SECTOR
d. MOBILES BOTS.REG./FOR'N								
M1	6,500			5,835	1,350	Xaxaba	7,185	13,685
M2	10,000			6,315	1,350	Xaxaba	7,665	17,665
M3	1,470			1,120		Maun	1,120	2,590
M4	9,000						0	9,000
M5	nda		Maun	2,784	128	Xaxaba	2,912	2,912
M6	nda		Maun	2,040	0	Delta	2,040	2,040
Sub-total d.	26,970	0	0	18,094	2,828	0	20,922	45,064
e. MOBILES FOR'N REG/BASE								
M7	2,100			4,000		Xaxaba	4,000	6,100
M8							0	0
M9	800			2,160	400	Delta	2,560	3,360
M10							0	0
M11	644			2,160	704	Delta	2,864	3,508
M12				500			500	500
M13							0	0
M14							0	0
M15	2,000						0	2,000
M16							0	0
M17								0
M18								0
M19								0
Sub-total e.	5,544	0	0	8,820	1,104	0	9,924	15,468
f. MOBILES BOTS.REG'D & BASE								
M20	nda						0	0
M21	nda						0	0
M22	0						0	0
M23	0						0	0
M24	2,250						0	2,250
M25	2,000						0	2,000
M26	0						0	0
M27	5,800						0	5,800
M28	2,700						0	2,700
M29	3,000			900	0	Moremi	900	3,900
M30	0						0	0
M31	900							900
M32								0
Sub-total f.	16,650	0	0	900	0	0	900	17,550
TOTAL d+e+f	49,164	0	0	27,814	3,932	0	31,746	78,082

APPENDIX J. 13.A PAYMENTS TO GOVERNMENT

SAFARI LODGES / FIXED CAMPS / SAFARI OUTFITTERS

REF	63 VEHICLE LICENCE FEES	64 THIRD PARTY INS'	65 LEASE COSTS	66 LANDING FEES PAID	67 TAX PAID	68 PAID TO DWNP	69 GUIDE LICENCE HELD	70 LICENCE FEES PAID: GUIDE	71 LIQUOR	72 HUNTING	73 OTHER	74 COMMUN-ICATIONS PAID *	75 TOTAL PAID TO GOV'T
a. SAFARI LODGES													
F1	0	0	650	0	0	0	0	0	0	0	0	0	650
F2	0	0	1,000	0		520			150		60	1,078	2,808
F3	48	30	1,250	0	0	0	0	0	150		50	3,000	4,528
F4	125	75	1,400	0	4,260	0			150		50	5,474	11,534
F5	0	0	1,300	0		0	5	275			50		1,625
F6	0	0	0	0	0	0	0	0	0	0	50	0	50
F7	120	75	F'hold	0		0	0		150		370		715
F8			F'hold						150		50		200
F9	148	60	6,000	0		24,000	0		150		50	25,000	55,408
Sub-total a.	441	240	11,600	0	4,260	24,520	5	275	900	0	730	34,552	77,518
b. FIXED CAMPS													
F10	0	0		0							0		0
F11	148	60	nda	0		2,000	2	25			166		2,399
F12	0	0	F'hold	0	nda	0	2	50			350		400
F13	196	150	700	0	0	12,000	0				147	3,766	16,959
F14	75	45	3,100	0	nda	1,952	2	125			150	12,000	17,447
F15	1,348	645	36,867	0	13,634	26,732	12	675	600		500	25,970	106,971
F16	148	60	3,525	600		4,638	2	125			150	1,812	11,058
F17	172	75	4,600	0	1,386	2,800	1	25			150	1,000	10,208
F18	24	15	1,600	300		1,100	1	100			0		3,139
F19	72	45	400	0	2,500	0	0				110	4,950	8,077
F20	72	34	1,000	180		500	2	200			80	8,000	10,066
F21	100	100	758	60		0			150		305	565	2,038
F22	0	0	F'hold	0		0	3	300			1,500	nda	1,800
F23	72	45	500	0		500	5	125	150		200	3,000	4,592
F24	244	103	F'hold	0		885	1	100		150	500	190	2,172
F25	148	60	5,500	0		2,460	1	25			400	3,000	11,593
F26	96	60	1,500	817		6,750	13	700			170	6,000	16,093
Sub-total b.	2,915	1,497	60,050	1,957	17,520	62,317	47	2,575	900	150	4,878	70,253	225,012
Total a. + b.	3,356	1,737	71,650	1,957	21,780	86,837	52	2,850	1,800	150	5,608	104,805	302,530
c. HUNTING Coys.													
H1	268	135	13,200	0	5,000	0				nda	50	3,600	22,253
H2	1,250	500	41,580	0		0	2	200		100,000	1,800	14,400	159,730
H3	0	0	0	0		0					50		50
H4	0	0	0	0		0					50		50
H5	336	225	31,880	0	14,000	0				33,000	50	3,000	82;491
H6	170	75	26,000	600		0	2	25		30,000	400		57,270
H7	318	105	64,524	0	48,415	2,500			150	160,000	1,210	30,900	308,122
H8	0	0	9,500	0		0							9,500
Sub-total c.	2,342	1,040	186,684	600	67,415	2,500	4	225	150	323,000	3,610	51,900	639,466
TOTAL a+b+c.	5,698	2,777	258,334	2,557	89,195	89,337	56	3,075	1,950	323,150	9,218	156,705	941,996

*Telephone, telex, postage etc

APPENDIX J. 13.B PAYMENTS TO GOVERNMENT

MOBILE OPERATORS

REF	63 VEHICLE LICENCE FEES	64 THIRD PARTY INSURANCE	65 LEASE COSTS	66 LANDING FEES PAID	67 TAX PAID	68 PAID TO DWNP	69 GUIDE LICENCE HELD	70 GUIDE LICENCE FEES	71 LIQUOR LICENCE FEES	72 HUNTING LICENCE FEES	73 OTHER LICENCE FEES	74 COMMUNICATIONS PAID *	75 TOTAL PAID TO GOV'T
d. MOBILES BOTS.REG./FOR'N													
M1						25,600	8	800				700	27,100
M2				1,050	3,000	6,000	4	400				150	10,600
M3						2,030	nda	0				0	2,030
M4					400	5,000	3	300				100	5,800
M5	24	24		200	0	3,300	1	25				100	3,673
M6						3,924	2	200				0	4,124
Sub-total d.	24	24	0	1,250	3,400	45,854	18	1,725	0	0	0	1,050	53,327
e. MOBILES FOR'N REG/BASE													
M7						728		0			40		768
M8													0
M9						1,600							1,600
M10													0
M11				220		1,220							1,440
M12						2,940					320		3,260
M13						2,150							2,150
M14													0
M15							1	100					100
M16													0
M17													0
M18													0
M19													0
Sub-total e.	0	0	0	220	0	8,638	1	100	0	0	360	0	9,318
f. MOBILES BOTS.REG'D & BASE													
M20	24	24				2,000	1	25			80	300	2,453
M21	nda												0
M22	120	120				0	nda	100			50	480	870
M23	24	24				960	1	50			50	400	1,508
M24	150	120			686	2,250	1	50			70	2,379	5,705
M25	64	48				2,600	1	50			50	300	3,112
M26	112	96				4,000	1	50			50	1,800	6,108
M27	72	72				8,000	2	200			50	3,000	11,394
M28		0				3,600	1	25			50	2,400	6,075
M29	240	240		1,500	2,790	6,000	2	200			50	500	11,520
M30	nda												0
M31						2,000	2	200			50	360	2,610
M32											50		50
Sub-total f.	806	744	0	1,500	3,476	31,410	12	950	0	0	600	11,919	51,405
TOTAL d+e+f	830	768	0	2,970	6,876	85,902	31	2,775	0	0	960	12,969	114,050

*Telephone, telex, postage etc

APPENDIX K

QUESTIONNAIRE FOR INDEPENDENT TOUR GROUPS 1985

OPINIONS

Please would you rate the items below on a 5 point scale by marking the appropriate box.
1=excellent   2=good   3=satisfactory   4=poor   5=very poor

	EXCELLENT 1	2	3	4	V POOR 5
NATIONAL PARKS					
12 roads					
13 road signs					
14 maps					
15 guide books					
NATIONAL PARK CAMPSITES					
16 water supply					
17 toilets					
18 showers					
19 refuse removal					
20 firewood supply					
21 general appearance					
22 location					
23 availability of provisions					
PRIVATELY OWNED CAMPSITES					
24 water supply					
25 toilets					
26 showers					
27 refuse removal					
28 firewood supply					
29 general appearance					
30 location					
31 availability of provisions					
DEPT. OF WILDLIFE AND NATIONAL PARKS STAFF					
32 courtesy					
33 efficiency					
34 helpfulness					
35 wildlife-information					
CUSTOMS AND IMMIGRATION PERSONNEL					
36 courtesy					
37 efficiency					
38 helpfulness					
39 availability of fuel					

40 Please rank in order of importance which NATIONAL PARK FACILITIES you feel <u>should</u> be improved.

1=most improvement required   5=least required

- roads ___________
- ablution ___________
- information ___________
- road signs ___________
- refuse collection ___________
- OTHER(specify) ___________

APPENDIX K.

KALAHARI CONSERVATION SOCIETY

1985 TOURIST INDUSTRY RESEARCH PROJECT

Please would you assist in this project by filling in the information requested and ticking appropriate boxes.

1. SEX

Male	Female

2. AGE ..... years

3. Town/district and country of residence ....

....

4. Nationality ....

5. How many times have you previously holidayed in Botswana?...
   (Answer 1 if this is your first visit)

6. How did you hear about touring in Botswana?

Travel agent	Word of mouth	Advertising	Film	Other(specify)

....

7. If you have visited Botswana before was your first visit with an organized tour?

Yes	No

8. On this visit how many days have you spent in Botswana so far? ...... days

9. What is the total length of this visit to be? ..... days

10. Please rank in order of importance the reasons why you came to Botswana for your holiday.
1 = most important 7 = least important

* convenience ....
* political stability ....
* wildlife areas without restrictions ....
* unique environment ....
* sense of adventure ....
* uncommercialised ....
* the people ....
* other (please specify).................................

....

11. What previous "bush" experience have you had?

Extensive	Moderate	Some	Limited	None

REF: ......

41. Would you holiday in Botswana again?

Yes	No

42. If yes, which particular areas would you visit?..............

....

....

43. What have you liked most about your visit?..................

....

....

....

....

....

....

44. What have you liked least about your visit?.................

....

....

....

....

....

....

45. Are there any facilities/services that you would like to see introduced or extended?

....

....

....

....

APPENDIX L

QUESTIONNAIRE FOR USE WITH INDIVIDUAL TOURISTS, 1985

APPENDIX L.

KALAHARI CONSERVATION SOCIETY

1985 TOURIST INDUSTRY RESEARCH PROJECT

Please would you assist in this project by filling in the information requested and ticking the appropriate boxes.

If you are not able to return the completed questionnaire to an interviewer, please would you post it to:

KALAHARI CONSERVATION SOCIETY
P O BOX 859
GABORONE

---

1. The number of people in your party? ....

2. The number of vehicles in your party? ....

3. Type/s of vehicle ....

4. Is the party an organized commercial tour group?.........

5. On this visit how many days have you spent in Botswana so far?

   .... days

6. What is the total length of this visit to be?

   .... days

7. What distance have you travelled in Botswana so far?

   .... km

8. What is your average fuel consumption on this holiday?

   .... km per litre OR .... litres per 100 km

NUMBER:
DUPLICATE: Y N

For each area please fill in estimates of the total amount spent by your party:

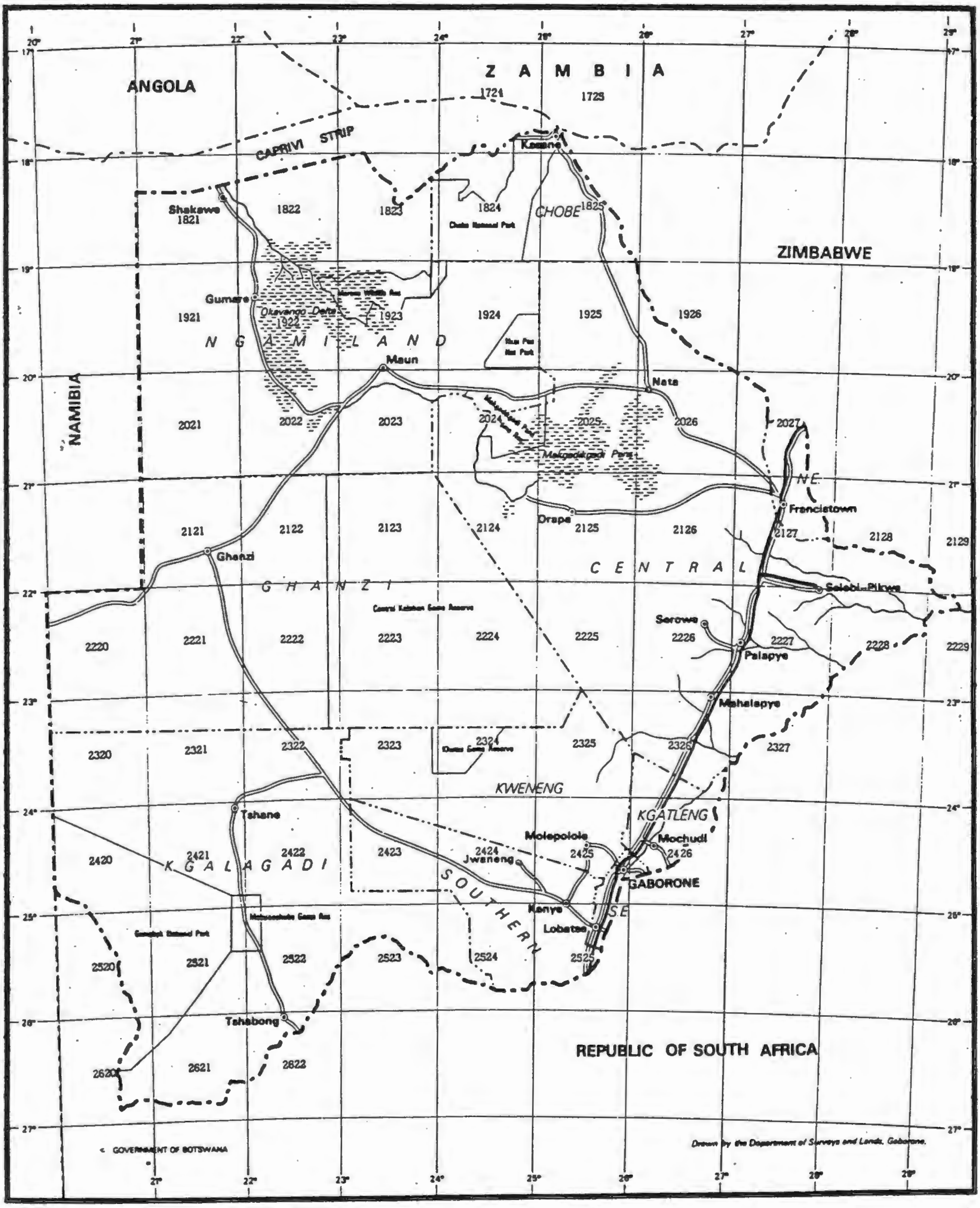
	FRANCISTOWN	NATA	MAUN	MOREMI	SAVUTI	CHOBE	KASANE	GABARONE	OTHER	
Length of stay in days										

	FRANCISTOWN	NATA	MAUN	MOREMI	SAVUTI	CHOBE	KASANE	GABARONE	OTHER	
Type of accommodation										
camping										
hotel/motel										
safari lodge										

	FRANCISTOWN	NATA	MAUN	MOREMI	SAVUTI	CHOBE	KASANE	GABARONE	OTHER	
Expenditure										
accommodation										
camping										
fuel										
food										
liquor										
restaurants										
curios from SHOPS										
curios from LOCALS										
motor spares										
park entry fees										
organised trip										
guide hire										
dugout hire										
Other (specify)										

PLEASE MARK YOUR ROUTE ON THE MAP

Mark entry & exit points and use arrows to show direction of travel.



APPENDIX M

OPERATOR SEASONS BY TYPE OF OPERATOR

APPENDIX M.

OPERATOR SEASONS BY TYPE OF OPERATOR

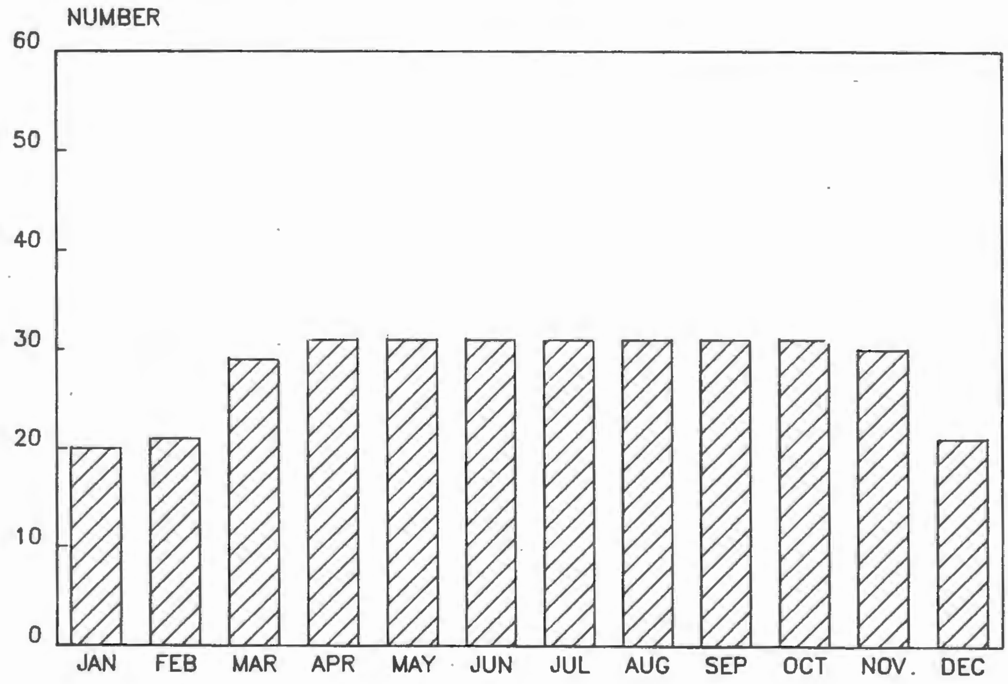
The following operating seasons were reported:

TYPE OF OPERATOR	OPERATING SEASON
20 Fixed and 11 mobile operators	Jan. to Dec.
2 mobile operators	Jan. to Oct.
1 Fixed	Feb. to Nov.
1 Fixed and 1 mobile operator	Mar. to Dec.
7 fixed & 3 mobile	Mar. to Nov.
3 Mobile operators	Mar. to Oct.
1 Mobile operators	Apr. to Dec.
1 Fixed and 1 mobile operator	Apr. to Nov.
1 Fixed and 2 mobile operator	Apr. to Oct.
1 Mobile operator	May to Sept.
1 Mobile operator	May to Oct.
1 Mobile operator	June to Sept.

The chart below was drawn from the above information and shows the pattern of seasonality.

Exhibit 1

Total of fixed operators active in each month.



APPENDIX N

LIST OF HOTELS

APPENDIX N. HOTELS.

NAME OF COMPANY	TOWN	
BOSELE HOTEL	Selebi-Phikwe	No response
BOTSALO HOTEL	Palapye	Responded
BROADWAY FLATS	Gaborone	No response
CHOBE GAME LODGE	See Appendix H	
CHOBE SAFARI LODGE	Kasane	Interviewed
CUMBERLAND HOTEL	Lobatse	No response
GABORONE HOTEL	Gaborone	Responded
GABORONE SUN	Gaborone	Interviewed
GRAND HOTEL	Francistown	Interviewed
KALAHARI ARMS	Ghanzi	Interviewed
KANYE MOTEL	Kanye	No response
LIMPOPO INN	See Appendix H	
LOBATSE HOTEL	Lobatse	No response
MAFENYA-TLALA	Molepolole	Responded
MAHALAPYE HOTEL	Mahalapye	No response
MOGO HOTEL	Gaborone	No response
MORNINGSTAR MOTEL	Gaborone	No response
MOTEL MARANG	Francistown	Interviewed
MOTEL SEDIBELO	Mochudi	Responded
OASIS MOTEL	Gaborone	Interviewed
PALAPYE HOTEL	Palapye	Responded
PRESIDENT HOTEL	Gaborone	Interviewed
RILEY'S HOTEL	Maun	Interviewed
SEROWE HOTEL	Serowe	No response
TATI HOTEL	Francistown	Interviewed
TSHWARAGANO HOTEL	Serowe	No response
TULI LODGE	See Appendix H	
ZANZIBAR HOTEL	See Appendix H	

APPENDIX O

DRIED MEAT CALCULATIONS

APPENDIX O.

EXHIBIT 1.

ANALYSIS OF DRIED MEAT DISTRIBUTED TO EMPLOYEES OF HUNTING COMPANIES DURING 1984

SPECIES	TOTAL SHOT	AV.LIVE MASS-kg (note 1)	TOT.MEAT MASS-kg (note 2)	DRIED MEAT MASS-kg (note 3)
Buffalo	239	775	185 225	46 306
Bushbuck	4	35	140	35
Duiker	10	17	170	42
Eland	20	580	11 600	2 900
Gemsbok	101	225	22 725	5 681
Hartebeest	73	136	9 928	2 482
Impala	138	45	6 210	1 552
Kudu	77	225	17 325	4 331
Lechwe	114	90	12 960	2 565
Ostrich	43	140	6 020	1 505
Reedbuck	49	75	3 675	919
Sable	37	230	8 510	2 128
Sitatunga	29	107	3 103	776
Springbok	95	39	3 705	926
Steenbok	40	11	440	110
Tssesebe	99	133	13 167	3 292
Warthog	91	85	7 735	1 934
Wildebeest	123	215	26 445	6 611
Zebra	144	320	46 080	11 520
		TOTAL	385 163 kg	95 615 kg

Note 1. The mass of animals was taken from "Mammals of Southern Africa" by Reay N. Smithers.
In calculating the mass of meat certain assumptions were made. Where there is a difference in the mass of male and female animals the average of the two has been used.

Note 2. The total meat mass is calculated by multiplying the total number shot by the average live mass.

Note 3. The dried meat mass was estimated at 25% of the total mass of the animal.

From Exhibit 1 calculations can be made of the value of this meat. The figure used in the calculations in the text, P191 230, is based upon a price of P2 per kg quoted in Kasane in October 1984 as being the current price of dried meat. This price varies from centre to centre however and thus a range of values are shown.

EXHIBIT 2

VALUE OF DRY MEAT AT VARIOUS PRICES per kg

Based upon the figures in Table 1 the value of dry meat to employees would be:

Value at 50t/kg	P 47 807
Value at P1/kg	P 95 615
Value at P2/kg	P191 230
Value at P3/kg	P286 485
Value at P4/kg	P382 460

APPENDIX P

ESTIMATED NUMBER OF EMPLOYEES BY LOCATION

APPENDIX P.

TABLE 10

ESTIMATED NUMBER OF PAID EMPLOYEES BY LOCATION (1) AND ECONOMIC ACTIVITY-PRIVATE, PARASTATAL AND LOCAL GOVERNMENT (2) AUGUST 1983

Source: Employment Survey, August, 1983: Central Statistics Office.

ECONOMIC ACTIVITY	GABORONE	FRANCISTOWN	SELIBE PHIKWE	LOBATSE	KGATLENG DISTRICT	SOUTHERN DISTRICT	SOUTH - EAST DISTRICT	KWENENG DISTRICT	KGALAGADI DISTRICT	GHANZI DISTRICT	CENTRAL DISTRICT	NORTH - EAST DISTRICT	NORTH - WEST DISTRICT	JWANENG.	MIXED - NOT SPECIFIED	TOTAL
AGRICULTURE	133	325	-	215	-	789	152	55	11	1 013	1 631	-	138	-	58	4 518
MINING AND QUARRYING	212	-	4 434	46	-	-	-	-	-	-	1 546	89	-	894	-	7 221
MANUFACTURING	3 237	1 423	547	2 327	386	272	378	26	-	100	546	27	209	321	-	9 796
ELECTRICITY AND WATER	661	49	491	451	-	10	-	-	-	-	235	-	15	8	-	1 920
CONSTRUCTION	5 404	1 089	164	122	33	246	1	75	22	589	1 216	-	-	588	-	9 550
COMMERCE	5 144	2 306	734	731	193	723	297	489	32	47	3 302	81	1 063	114	-	15 255
TRANSPORT & COMMUNICATIONS	1 499	464	358	148	48	273	59	4	-	24	630	255	50	76	11	3 899
FINANCE & BUSINESS SERVICES	2 657	475	168	779	58	645	2	77	5	27	873	-	58	132	-	5 954
COMMUNITY & SOCIAL SERVICES INCLUDING EDUC. & LOCAL GOVT.	3 594	1 814	125	459	477	711	495	682	275	312	2 157	-	823	355	-	12 278
TOTAL (2)	22 540	7 943	7 021	5 276	1 195	3 668	1 385	1 408	345	2 113	12 134	452	2 354	2 488	69	70 392

1) Locational data should be analyzed with caution. Errors may have been introduced during coding and the sample design is not intended to provide estimates by location.
2) Excludes Central Government for which locational data are not available.

APPENDIX Q

EXTRACTS FROM STATISTICAL BULLETIN
VOLUME 10.1. MARCH 1985

TABLE 29 : NUMBER OF ARRIVALS BY PURPOSE OF ENTRY

(FIGURES IN HUNDREDS)

YEAR AND MONTH		BUSINESS	HOLIDAY	EMPLOY- MENT	IN-TRANSIT	RETURNING RESIDENT	DAY VISITOR	OTHER	TOTAL
1976*		454	650	46	175	1 941	102	163	3 530*
1977*		560	500	41	264	2 217	126	220	3 927*
1978		618	569	58	205	2 555	139	286	4 429
1979		742	581	66	133	2 729	184	428	4 863
1980		705	837	61	244	3 513	209	581	6 148
1981		491	579	25	189	3 309	389	592	5 580
1982		712	740	28	178	3 981	606	715	6 960
1983		702	820	24	210	4 479	633	620	7 504
1981	JAN	41	56	2	30	241	17	53	441
	FEB	29	42	3	13	134	17	43	280
	MAR	27	20	2	5	101	7	32	194
	APR	25	71	3	12	154	10	42	317
	MAY	20	32	1	9	115	24	32	233
	JUN	50	43	1	17	271	45	47	474
	JUL	54	56	2	14	292	38	58	513
	AUG	57	56	2	16	367	35	67	607
	SEP	36	41	2	17	395	40	47	578
	OCT	52	49	3	17	389	42	53	605
	NOV	59	34	2	16	377	38	46	572
	DEC	41	79	2	23	473	76	72	766
1982	JAN	57	44	2	13	332	40	59	547
	FEB	59	29	2	12	256	29	58	445
	MAR	70	36	3	8	284	35	63	499
	APR	59	87	2	10	407	59	69	693
	MAY	70	69	1	17	342	55	68	622
	JUN	67	59	-	11	278	51	60	526
	JUL	60	73	2	18	319	62	63	597
	AUG	73	100	1	11	357	56	74	672
	SEP	46	42	1	11	269	52	41	462
	OCT	52	52	10	17	388	55	55	629
	NOV	51	45	1	18	332	44	46	537
	DEC	48	104	3	32	417	68	59	731
1983	JAN	51	43	2	27	355	43	47	569
	FEB	56	33	3	12	307	42	41	494
	MAR	69	57	1	18	327	42	50	566
	APR	50	69	1	15	346	50	50	582
	MAY	60	53	1	19	378	47	46	608
	JUN	53	43	1	11	280	36	40	466
	JUL	62	83	2	19	394	61	65	687
	QUG	61	94	2	16	385	68	57	684
	SEP	59	61	2	16	411	43	43	636
	OCT	65	64	3	15	400	55	48	651
	NOV	64	59	4	15	359	60	47	608
	DEC	52	161	2	27	537	86	86	953
1984	JAN	57	33	11	22	349	86	50	608
	FEB	68	26	8	17	317	71	54	562
	MAR	74	36	9	16	355	84	71	646
	APR	61	78	8	23	438	108	82	798
	MAY	69	44	6	15	338	66	61	592
	JUN	52	33	4	13	276	63	53	500
	JUL	74	74	5	19	357	81	71	681
	AUG	71	61	5	14	372	73	62	659
	SEP	69	34	5	14	399	76	68	655
	OCT	66	37	5	15	363	67	69	623

SOURCE: CENTRAL STATISTICS OFFICE

*1976 AND 1977 FIGURES DO NOT INCLUDE ARIVALS BY RAIL.
IN 1978 THESE TOTALLED 472 HUNDRED (47,200)

APPENDIX R

EVALUATION OF PROMOTIONAL ACTIVITIES

APPENDIX R

EVALUATION OF PROMOTIONAL ACTIVITIES.

Figures under the heading "Type of promotional activity" in the Exhibit below show the number of companies indicating the % of clients recruited by the promotional activity shown.

Exhibit

Indicated sources of clients by type of promotion.

% of clients.	Word of Mouth.	Adverts	Travel Agents
	Type of Promotional Activity.		
10	0	4	3
20	1	2	3
30	2	1	4
40	4	2	3
50	7	7	5
60	0	2	0
70	1	0	0
80	5	0	0
90	2	0	0
100	9	1	1

The Exhibit 1 indicates how the companies identified their sources of clients.

e.g. 1. Reading across the 50% line, 7 companies said that 50% of clients were derived from "word of mouth" referrals, 7 companies felt that 50% of clients came from advertising whilst 5 companies said that 50% of clients came from travel agents.

e.g. 2. Reading across the 100% line, 9 companies stated 100% of their clients came from word of mouth referrals and only 1 said that 100 % of clients came from advertising or travel agents.

APPENDIX S

STATISTICAL BULLETIN VOLUME 8.4.
TABLE 4.
STATISTICAL BULLETIN VOLUME 9.1.
TABLE 4.

APPENDIX S STATISTICAL BULLETIN 8.4. DECEMBER 1983

TABLE 4

NUMBER OF DEPARTING VISITORS, EXPENDITURE AND LENGTH OF STAY

YEAR AND MONTH		NUMBER OF DEPARTING VISITORS (HUNDREDS)	ESTIMATED AMOUNT OF MONEY SPENT (P'000)	AVERAGE EXPENDITURE PER VISITOR (PULA)	LENGTH OF STAY (DAYS)	AVERAGE EXPENDITURE PER VISITOR PER DAY (PULA)
1976*		1 504	6 489	43,0	5,6	7,7
1977*		1 795	7 724	43,0	5,5	8,0
1978		1 795	8 839	49,3	5,9	8,4
1979		2 085	12 569	60,3	6,2	9,8
1980		2 577	17 388	67,4	5,7	11,9
1981		2 710	19 103	70,6	5,4	13,3
1982		3 035	19 042	104,3	4,9	22,1
1980	JAN	192	873	45,4	8,2	5,5
	FEB	149	803	53,9	6,1	8,8
	MAR	179	986	55,1	6,0	9,2
	APR	213	1 062	49,8	5,7	8,7
	MAY	246	1 906	77,4	5,2	14,9
	JUN	190	1 184	62,3	5,1	12,2
	JUL	212	1 358	64,0	5,9	10,8
	AUG	258	2 772	107,5	5,5	19,5
	SEP	211	1 630	77,1	5,6	13,8
	OCT	234	1 566	66,9	4,7	14,2
	NOV	190	1 288	67,7	5,0	13,5
	DEC	303	1 959	64,6	5,4	12,0
1981	JAN	160	902	56,1	7,6	7,4
	FEB	164	991	60,6	5,2	11,4
	MAR	166	1 022	61,5	3,4	17,6
	APR	169	945	56,0	5,6	10,0
	MAY	184	986	53,6	5,4	9,9
	JUN	276	1 614	58,4	4,0	14,6
	JUL	254	1 622	63,9	5,6	11,4
	AUG	257	3 274	127,5	6,0	21,2
	SEP	310	1 945	62,7	5,4	11,6
	OCT	252	1 844	73,1	6,0	12,2
	NOV	185	1 314	71,1	4,3	16,5
	DEC	333	2 644	79,4	5,2	15,3
1982	JAN	221	1 159	93,7	7,1	13,2
	FEB	183	1 016	93,[illegible]	5,1	18,2
	MAR	234	1 125	82,8	3,2	25,9
	APR	279	1 612	96,9	5,1	19,0
	MAY	295	1 721	92,8	3,9	23,8
	JUN	208	1 452	118,7	4,4	27,0
	JUL	359	2 531	114,3	5,5	20,8
	AUG	242	1 992	125,2	5,3	23,6
	SEP	151	1 255	124,3	5,3	23,5
	OCT	253	1 664	113,1	4,6	24,6
	NOV	251	1 319	89,1	3,9	22,8
	DEC	329	2 181	113,2	4,9	23,1
1983	JAN	276	1 220	43,9	7,0	6,3
	FEB	195	1 083	91,6	5,0	18,3
	MAR	218	1 290	104,8	5,4	19,4
	APR	236	2 178	126,8	5,2	10,4
	MAY	268	6 358	237,3	5,0	47,5
	JUN	261	6 538	250,3	5,3	47,2
	JUL	315	3 642	115,5	5,3	21,8
	AUG	328	4 319	131,8	6,9	21,6
	SEP	345	4 528	131,6	6,9	19,0
	OCT	306	3 506	141,5	4,6	24,9
	NOV	265	2 791	104,8	4,8	23,3
	DEC	404	4 242	105,1	4,6	22,8

SOURCE: TOURIST STATISTICS UNIT, CENTRAL STATISTICS OFFICE.

FIGURES FOR 1976 AND 1977 DO NOT INCLUDE DEPARTURES BY RAIL [135(HUNDRE
IN 1978]

APPENDIX S continued. STATISTICAL BULLETIN 9.1. MARCH 1984

NUMBER OF DEPARTING VISITORS, EXPENDITURE AND LENGTH OF STAY

YEAR AND MONTH		NUMBER OF DEPARTING VISITORS (HUNDREDS)	ESTIMATED AMOUNT OF MONEY SPENT (P'000)	AVERAGE EXPEN- DITURE PER VISITOR (PULA)	LENGTH OF STAY (DAYS)	AVERAGE EXPEN- DITURE PER VISITOR PER DAY (PULA)
1976		1 504	6 489	43,0	5,6	7,7
1977		1 795	7 724	43,0	5,5	8,0
1978		1 795	8 839	49,3	5,9	8,4
1979		2 085	12 569	60,3	6,2	9,8
1980		2 577	17 388	67,4	5,7	11,9
1981		2 710	19 103	70,6	5,4	13,3
1982		3 005	19 042	104,8	4,9	22,1
1983		3 504	28 714	104,2	5,4	21,4
1980	JAN	192	873	45,4	8,2	5,5
	FEB	149	803	53,9	6,1	8,8
	MAR	179	986	55,1	6,0	9,2
	APR	213	1 062	49,8	5,7	8,7
	MAY	246	1 906	77,4	5,2	14,9
	JUN	190	1 184	62,3	5,1	12,2
	JUL	212	1 358	64,0	5,9	10,8
	AUG	258	2 772	107,5	5,5	19,5
	SEP	211	1 630	77,1	5,6	13,8
	OCT	234	1 566	66,9	4,7	14,2
	NOV	190	1 288	67,7	5,0	13,5
	DEC	303	1 959	64,6	5,4	12,0
1981	JAN	160	902	56,1	7,6	7,4
	FEB	164	991	60,6	5,2	11,4
	MAR	166	1 022	61,5	3,4	17,6
	APR	169	945	56,0	5,6	10,0
	MAY	184	986	53,6	5,4	9,9
	JUN	276	1 614	58,4	4,0	14,6
	JUL	254	1 622	63,9	5,6	11,4
	AUG	257	3 274	127,5	6,0	21,2
	SEP	310	1 945	62,7	5,4	11,6
	OCT	252	1 844	73,1	6,0	12,2
	NOV	185	1 314	71,1	4,3	16,5
	DEC	333	2 644	79,4	5,2	15,3
1982	JAN	221	1 159	93,7	7,1	13,2
	FEB	183	1 016	93,0	5,1	18,2
	MAR	234	1 125	82,8	3,2	25,9
	APR	279	1 612	96,9	5,1	19,0
	MAY	295	1 721	92,8	3,9	23,8
	JUN	208	1 452	118,7	4,4	27,0
	JUL	359	2 531	114,3	5,5	20,8
	AUG	242	1 992	125,2	5,3	23,6
	SEP	151	1 255	124,3	5,3	23,5
	OCT	253	1 664	113,1	4,6	24,6
	NOV	251	1 319	89,1	3,9	22,8
	DEC	329	2 181	113,2	4,9	23,1
1983	JAN	277	1 223	80,1	7,0	11,4
	FEB	196	1 083	91,6	5,0	18,3
	MAR	220	1 339	107,5	5,4	19,9
	APR	290	2 269	130,1	5,2	25,0
	MAY	270	1 817	112,2	5,0	22,0
	JUN	287	2 523	132,5	5,3	25,9
	JUL	315	1 809	115,5	5,3	21,8
	AUG	328	3 061	139,0	6,1	22,8
	SEP	346	3 051	131,0	6,9	19,0
	OCT	306	3 506	141,5	4,6	24,9
	NOV	265	2 791	104,8	4,8	23,3
	DEC	404	4 242	105,1	4,6	22,8
1984	JAN	310	3 376	108,9	9,1	12,0
	FEB	178	2 771	155,7	8,5	18,3

SOURCE: TOURIST STATISTICS UNIT, CENTRAL STATISTICS OFFICE.

FIGURES FOR 1976 AND 1977 DO NOT INCLUDE DEPARTURES BY RAIL [135(HUNDREDS) IN 1978]