



# **ANNUAL REPORT AIR TRAFFIC STATISTICS 2013 CALENDAR YEAR**

Released by  
Civil Aviation Authority Of Botswana  
Department Of Air Transport

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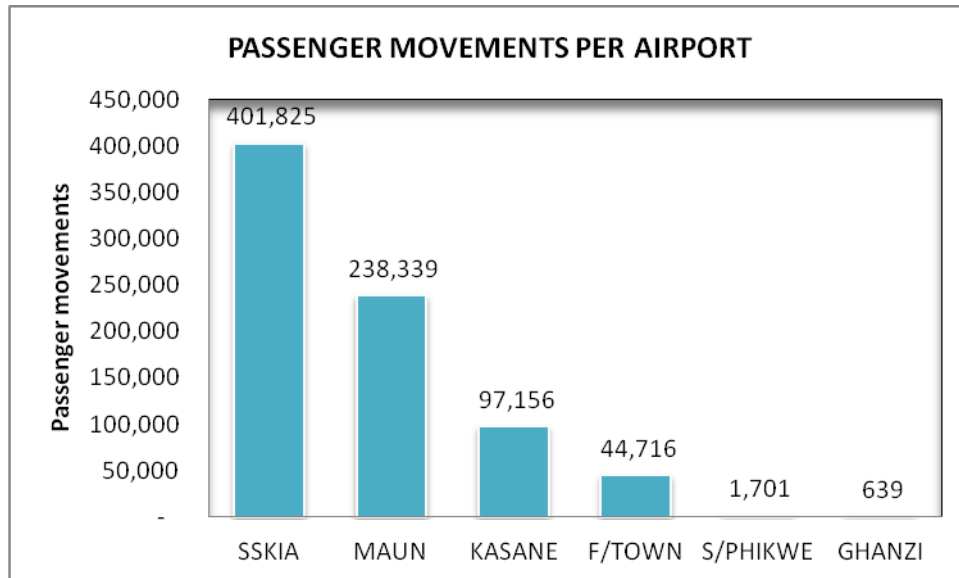
## CALENDAR YEAR 2013 AIR TRAFFIC MARKET ANALYSIS

### KEY POINTS

- Air passenger traffic in Botswana has expanded with an average growth rate of 3.5% on the total market compared to last year.
- Overall growth in passenger traffic mirrored positive economic growth, especially on the domestic sector which registered 4.9% growth from the previous year.
- Maun International Airport continues to be stable since 2011 though the increase was at a decreasing rate between 2011 and 2012
- Kasane International Airport also proves to be growing into a popular tourist destination as it registered a noticeable 30.2% increase in passenger numbers from last year. This was expected as other airlines started showing interest in operating at this airport, as we saw SA Airlink joining Air Botswana to fly to this airport.
- Continuous instability at Botswana's only two cities being Sir Seretse Khama International Airport in Gaborone, and Francistown International Airport couldn't go unnoticed.
- Increases at Selebi Phikwe and Ghanzi airports are not that significant as these airports handle only occasional non scheduled services

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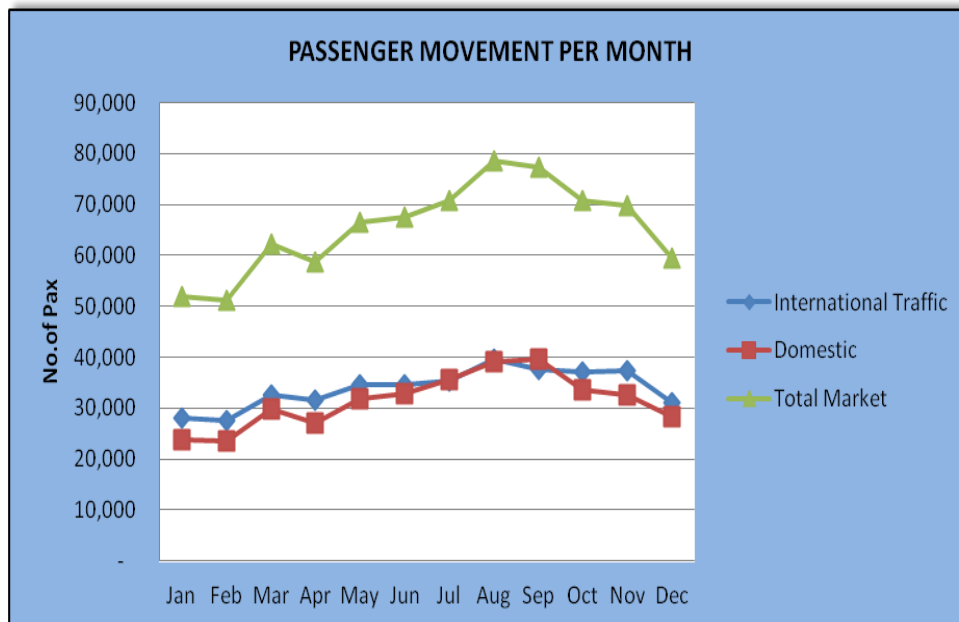
## PASSENGER MARKET



*\*Air passenger movements recorded per station in the Calendar year 2013*

- Total passenger movements during the year 2013 was recorded at seven hundred and eighty-four thousand, three hundred and seventy-six (**784,376**). This presented an increase of 3.5% over the previous calendar year.
- Sir Seretse Khama has always been the busiest airport in terms of passenger numbers. It recorded four hundred and one thousand, eight hundred and twenty-five (**401,825**) passengers this year, a decrease of 1.2% compared to last year.
- Traffic at Francistown continues to drop despite the recent expansion of this Airport.

Below is an illustration of the recorded passenger traffic per month

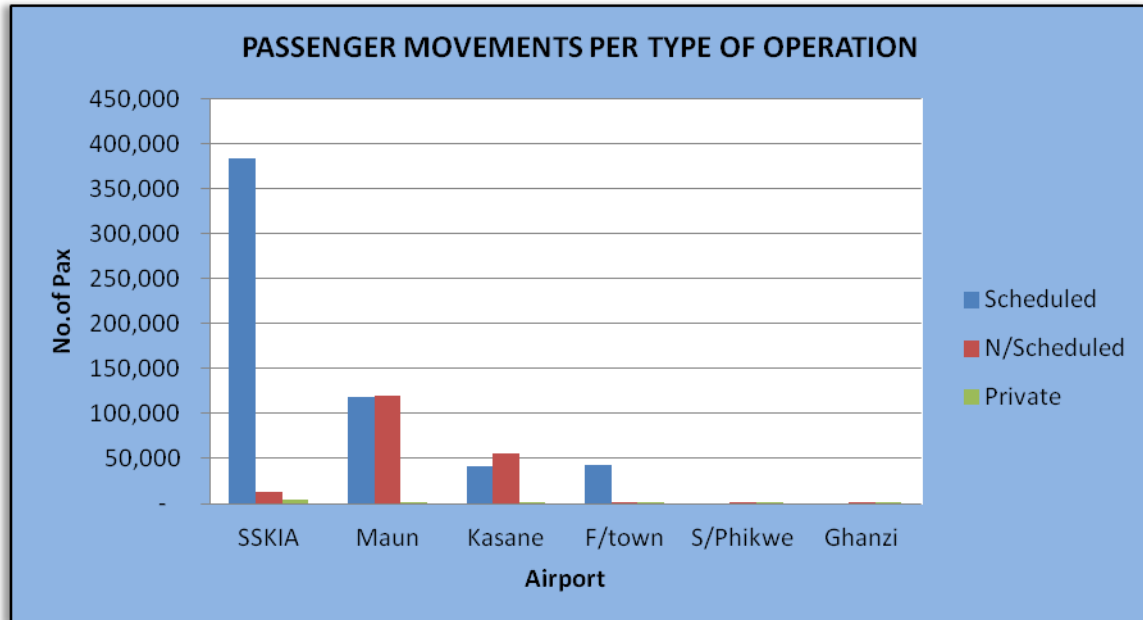


*\*Monthly air passenger movements recorded in the Calendar year 2013*

- There was a continuous increase in total passengers from May, reaching its peak in August. There was then a slight decrease throughout the year
- Minimal total air passenger traffic was recorded in January and February with an average of fifty-one thousand, five hundred and sixty-one (**51,561**) passengers
- The International market registered twenty eight thousand, eight hundred and fifty (**28,850**) more passengers than those under the domestic market.
- Both markets recorded almost an equal share of traffic as we saw the latter registering three hundred and seventy-seven thousand, seven hundred and sixty-three (**377,763**) passenger movements, making this about 48% of the total market share.
- Both International and Domestic markets recorded almost the same number of passengers in July and August
- September is the only month where the recorded domestic passengers were more than those of the International Market (exactly **2,000** more).

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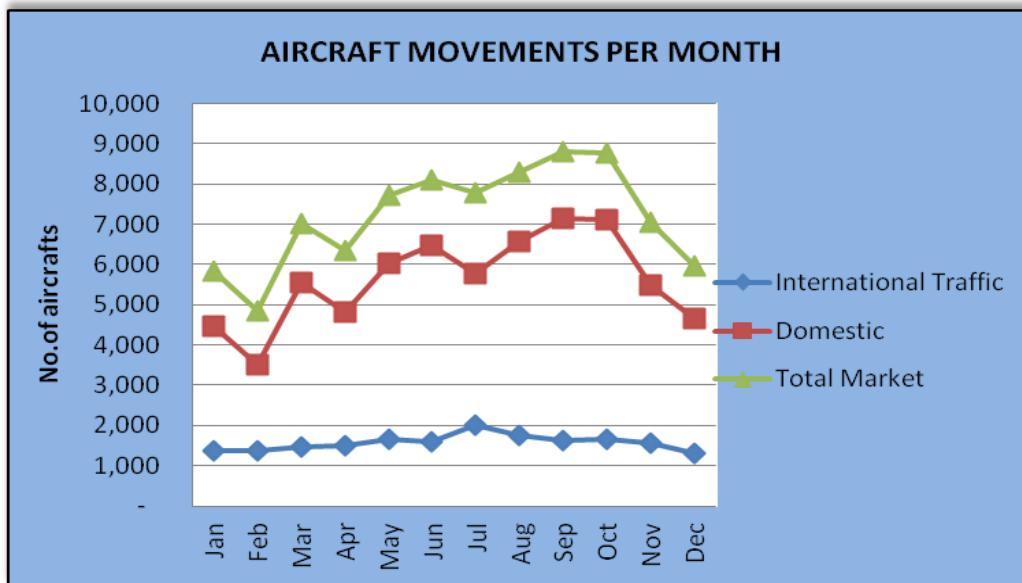
## AIR PASSENGER MOVEMENTS PER TYPE OF OPERATION



*\*2013 air passenger movements per type of operation recorded at each station*

- Sir Seretse Khama International Airport recorded the highest number of passengers. It contributed about **51.2%** of the market share, followed by Maun International Airport with a market share of **30.4%**.
- In the International market, we saw lots of activity at Sir Seretse Khama International Airport, where it contributed about **73.0%**.
- There were no International movements at Ghanzi Airport this year
- Maun International Airport dominated the domestic market, registering a share of **43.7%**. This airport serves as a major link between the International traffic and the tourist destinations that are scattered in the delta.

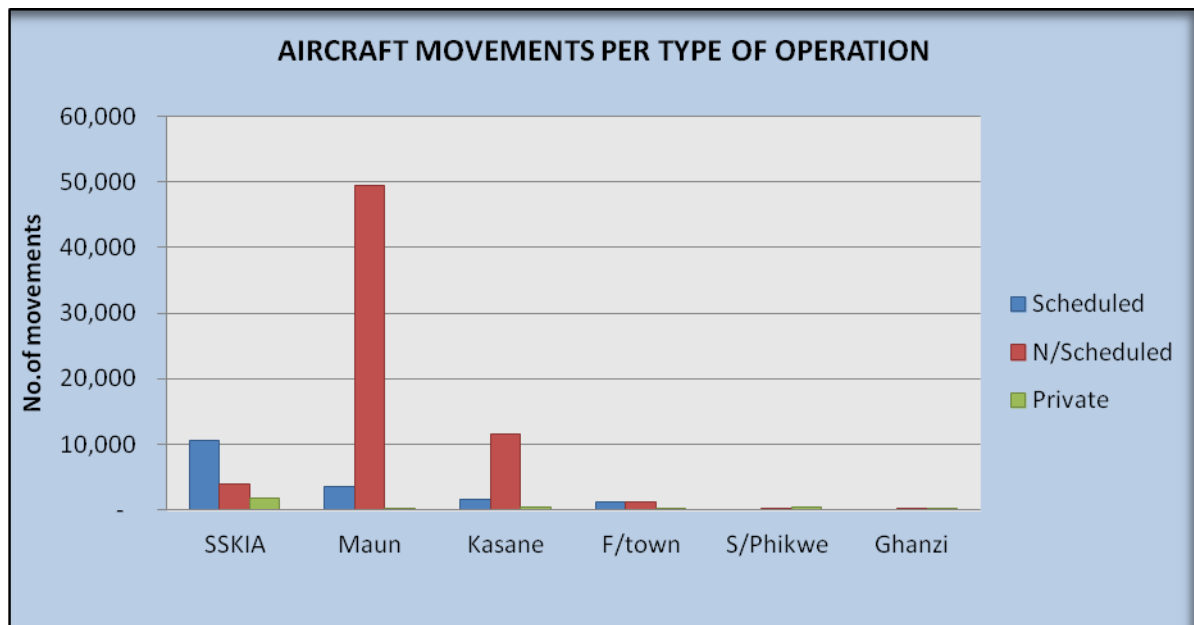
## MONTHLY AIRCRAFT MOVEMENTS



\*Aircraft movements recorded per month in the Calendar year 2013

- September was particularly a strong month, recording eight thousand, seven hundred and eighty-seven (**8,787**) movements this year.
- There were fewer movements in February where only four thousand, eight hundred and fifty three (**4,853**) aircraft movements were registered
- The highest recorded number of aircrafts on the International market was two thousand and twenty-three (**2,023**) which were in July. These movements dropped gradually until they were the lowest in December
- The domestic market reached its peak in September where seven thousand, one hundred and fifty-five (**7,155**) movements were registered. The lowest movements recorded were four thousand eight hundred and fifty-three (**4,853**) and these were in February

## AIR TRAFFIC MOVEMENTS PER TYPE OF OPERATION



*\*Aircraft movements recorded per type of operation at each station*

- Most movements are of non scheduled operators and most of these are in Maun. The operations contributed 76.0% of the total aircraft movements this year.
- Most scheduled aircraft movements were recorded at Sir Seretse Khama International Airport. There are three airlines operating scheduled services to this airport and these are; Air Botswana, Kenya Airways and South African Express.
- Private operations contributed an insignificant 3.6% of the total market
- Selebi Phikwe and Ghanzi Airports recorded the lowest amount of traffic, contributing only 0.6% of the data. These are minor airports that only handle smaller types of aircraft operating non scheduled and private air traffic
- There were no international movements in Ghanzi in the calendar year 2013

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## YEAR ON YEAR COMPARISON

### Aircraft Movements 2013 vs. 2012

	<b>Scheduled</b>	<b>Non scheduled</b>	<b>Private</b>	<b>Total Market</b>
International	1.6	17.5	-6.2	6.1
Domestic	3.8	9.3	1.3	8.6
<b>Total market</b>	2.4	10.1	-2.0	8.0

\*All figures are expressed in %change Year on Year

### Passenger Movements 2013 vs. 2012

	<b>Scheduled</b>	<b>Non scheduled</b>	<b>Private</b>	<b>Total market</b>
International	0.3	51.3	1.4	2.2
Domestic	4.4	4.6	47.9	4.9
<b>Total market</b>	1.7	8.5	27.4	3.5

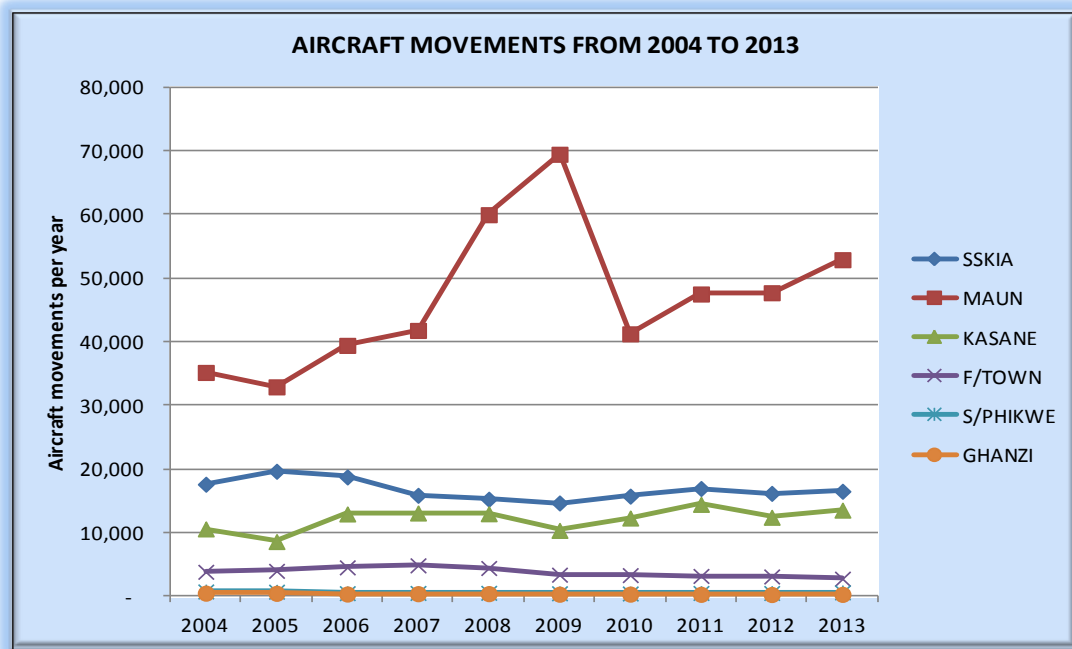
\*All figures are expressed in %change Year on Year

- ↗ There has been a positive growth of air traffic in all commercial services this year
- ↗ Non scheduled air traffic has increased at a much higher rate than the Scheduled traffic on average
- ↗ Botswana generally gets minimal private movements hence the changes are not that significant



## AIR TRAFFIC TREND

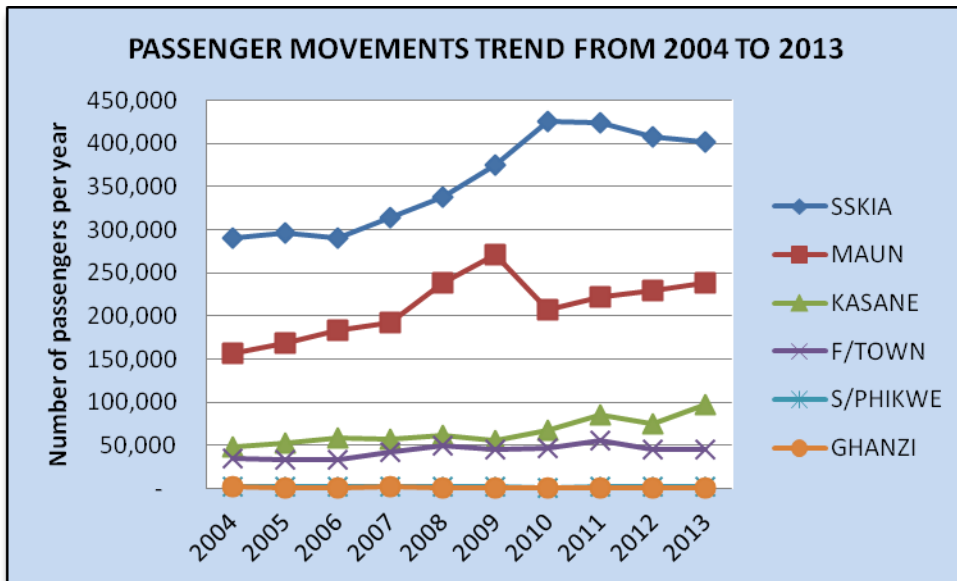
### Aircraft Movements



\*Air traffic trend from 2004 to 2013-AIRCRAFT MOVEMENTS

- The busiest station, Maun experienced a sudden drop of about 40.6% in 2010 and from then, there has been a gradual increase throughout.
- There has been an increase at Sir Seretse Khama International Airport from 2010 which can be attributed to the commencement of operations by Kenya Airways which started operating in September, 2009. There was stability at this airport until 2012 where traffic dropped by 4.5% from 2011. A slight growth of 2.0% has however been recorded this year.
- Traffic at Francistown International Airport has been continuously decreasing from 2008 to this year, it dropped by 11.4%. There is a need to aggressively market this airport to attract more operators. This means the country has to pave way for more foreign direct investors.

## Passenger Movements



*\*Air traffic trend from 2004 to 2013-PASSENGER MOVEMENTS*

- International airports recorded increase this year as compared to the previous year except Francistown International Airport
- Strongest passenger growth occurred in Kasane this year, recovering from a decrease of 14.1% in 2012, to a noticeable 7.1% increase this year
- Traffic at Francistown International Airport is continually decreasing

## ANNEX

### AIRCRAFT MOVEMENTS PER MONTH

TYPE OF FLIGHT	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	TOTAL
<b>International Traffic</b>													
Scheduled Arrival	469	416	461	464	464	433	450	470	452	450	445	419	5,393
Scheduled Departure	470	417	455	456	458	451	459	477	469	468	449	439	5,468
Non Scheduled Arrival	163	170	234	230	294	279	511	343	282	327	265	199	3,297
Non Scheduled Departure	190	190	223	236	314	272	503	357	314	351	281	201	3,432
Private Arrival	41	78	56	74	81	80	51	47	54	30	61	29	682
Private Departure	33	85	40	47	63	92	49	50	61	34	61	27	642
<b>TOTAL</b>	<b>1,366</b>	<b>1,356</b>	<b>1,469</b>	<b>1,507</b>	<b>1,674</b>	<b>1,607</b>	<b>2,023</b>	<b>1,744</b>	<b>1,632</b>	<b>1,660</b>	<b>1,562</b>	<b>1,314</b>	<b>18,914</b>
<b>Domestic Traffic</b>													
Scheduled Arrival	273	258	273	268	269	250	275	264	252	262	221	202	3,067
Scheduled Departure	270	253	271	264	267	251	269	258	244	255	211	198	3,011
Non Scheduled Arrival	1,911	1,408	2,458	2,068	2,614	2,830	2,558	2,944	3,237	3,201	2,615	2,075	29,919
Non Scheduled Departure	1,911	1,418	2,425	2,064	2,658	2,977	2,547	2,918	3,290	3,239	2,294	2,042	29,783
Private Arrival	72	84	67	76	90	90	53	101	68	85	62	59	907
Private Departure	42	76	65	83	136	84	63	77	64	80	67	65	902
<b>TOTAL</b>	<b>4,479</b>	<b>3,497</b>	<b>5,559</b>	<b>4,823</b>	<b>6,034</b>	<b>6,482</b>	<b>5,765</b>	<b>6,562</b>	<b>7,155</b>	<b>7,122</b>	<b>5,470</b>	<b>4,641</b>	<b>67,589</b>
<b>GRAND TOTAL</b>	<b>5,845</b>	<b>4,853</b>	<b>7,028</b>	<b>6,330</b>	<b>7,708</b>	<b>8,089</b>	<b>7,788</b>	<b>8,306</b>	<b>8,787</b>	<b>8,782</b>	<b>7,032</b>	<b>5,955</b>	<b>86,503</b>

**\*Table 1**

### AIR PASSENGER MOVEMENTS PER MONTH

TYPE OF FLIGHT	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	TOTAL
<b>International Traffic</b>													
Scheduled Arrival	14,194	13,506	15,565	15,125	16,726	16,351	16,294	17,105	16,774	16,646	16,564	13,209	188,059
Scheduled Departure	13,006	13,263	15,444	15,194	16,307	16,228	15,958	19,214	18,219	17,622	17,170	16,340	193,965
Non Scheduled Arrival	407	363	632	380	568	841	1,338	1,454	1,099	1,554	1,636	678	10,950
Non Scheduled Departure	430	385	643	590	671	848	1,368	1,556	1,310	1,159	1,538	718	11,216
Private Arrival	55	63	85	174	156	162	171	73	79	66	172	42	1,298
Private Departure	49	53	77	103	126	159	129	79	105	61	136	48	1,125
<b>TOTAL</b>	<b>28,141</b>	<b>27,633</b>	<b>32,446</b>	<b>31,566</b>	<b>34,554</b>	<b>34,589</b>	<b>35,258</b>	<b>39,481</b>	<b>37,586</b>	<b>37,108</b>	<b>37,216</b>	<b>31,035</b>	<b>406,613</b>
<b>Domestic Traffic</b>													
Scheduled Arrival	6,729	7,894	8,802	7,722	8,741	8,140	9,177	9,609	9,247	9,859	9,363	7,693	102,976
Scheduled Departure	6,681	7,574	8,716	8,089	8,863	8,050	9,255	9,447	9,183	8,550	9,084	7,889	101,381
Non Scheduled Arrival	5,480	3,868	5,943	5,613	6,793	7,915	8,625	10,277	10,162	7,685	6,737	6,142	85,240
Non Scheduled Departure	4,808	3,952	6,068	5,526	6,937	8,507	8,234	9,007	10,683	7,016	6,896	6,052	83,686
Private Arrival	79	111	111	114	244	112	140	342	190	277	264	305	2,289
Private Departure	78	94	129	96	267	150	186	321	121	238	223	288	2,191
<b>TOTAL</b>	<b>23,855</b>	<b>23,493</b>	<b>29,769</b>	<b>27,160</b>	<b>31,845</b>	<b>32,874</b>	<b>35,617</b>	<b>39,003</b>	<b>39,586</b>	<b>33,625</b>	<b>32,567</b>	<b>28,369</b>	<b>377,763</b>
<b>GRAND TOTAL</b>	<b>51,996</b>	<b>51,126</b>	<b>62,215</b>	<b>58,726</b>	<b>66,399</b>	<b>67,463</b>	<b>70,875</b>	<b>78,484</b>	<b>77,172</b>	<b>70,733</b>	<b>69,783</b>	<b>59,404</b>	<b>784,376</b>

**\*Table 2**

### AIRCRAFT MOVEMENTS PER YEAR FROM 2004 TO 2013

Year	SSKIA	Maun	Kasane	F/town	S/Phikwe	Ghanzi	TOTAL
2004	17,593	35,176	10,568	3,824	727	461	68,349
2005	19,632	32,907	8,581	3,973	689	436	66,218
2006	18,737	39,430	12,920	4,520	459	324	76,390
2007	15,848	41,781	13,068	4,838	496	376	76,407
2008	15,238	59,982	12,951	4,417	517	385	93,490
2009	14,645	69,485	10,335	3,363	451	296	98,575
2010	15,719	41,245	12,279	3,296	413	309	73,261
2011	16,922	47,508	14,429	3,171	492	277	82,799
2012	16,156	47,709	12,398	3,087	488	248	80,086
2013	16,486	52,905	13,521	2,734	585	272	86,503

\*Table 3

### GROWTH RATES FROM 2004 TO 2013-AIRCRAFT MOVEMENTS

Year	SSKIA	Maun	Kasane	F/town	S/Phikwe	Ghanzi	Total Market
2004							
2005	11.59	6.45	18.80	3.90	5.23	5.42	3.12
2006	4.56	19.82	50.57	13.77	33.38	25.69	15.36
2007	15.42	5.96	1.15	7.04	8.06	16.05	0.02
2008	3.85	43.56	0.90	8.70	4.23	2.39	22.36
2009	3.89	15.84	20.20	23.86	12.77	23.12	5.44
2010	7.33	40.64	18.81	1.99	8.43	4.39	25.68
2011	7.65	15.18	17.51	3.79	19.13	10.36	13.02
2012	4.53	0.42	14.08	2.65	0.81	10.47	3.28
2013	2.04	10.89	9.06	11.44	19.88	9.68	8.01

\*Table 4

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**PASSENGER MOVEMENTS PER YEAR FROM 2004 TO 2013**

Year	SSKIA	Maun	Kasane	F/town	S/Phikwe	Ghanzi	TOTAL
<b>2004</b>	290,464	156,043	48,206	35,047	2,406	1,518	<b>533,684</b>
<b>2005</b>	295,891	168,834	52,226	32,574	1,826	999	<b>552,350</b>
<b>2006</b>	289,550	183,580	57,985	33,243	1,584	1,116	<b>567,058</b>
<b>2007</b>	314,669	191,928	57,320	42,732	1,654	1,382	<b>609,685</b>
<b>2008</b>	337,969	238,542	62,162	49,453	1,546	725	<b>690,397</b>
<b>2009</b>	374,214	270,750	55,757	45,277	1,389	676	<b>748,063</b>
<b>2010</b>	425,845	207,671	67,633	47,332	1,248	533	<b>750,262</b>
<b>2011</b>	423,554	222,452	85,179	55,393	1,438	445	<b>788,461</b>
<b>2012</b>	406,840	229,651	74,640	45,137	1,447	422	<b>758,137</b>
<b>2013</b>	401,825	238,339	97,156	44,716	1,701	639	<b>784,376</b>

**\*Table 5**

**GROWTH RATES FROM 2004 TO 2013-PASSENGER MOVEMENTS**

Year	SSKIA	Maun	Kasane	F/town	S/Phikwe	Ghanzi	Total Market
<b>2004</b>							
<b>2005</b>	1.87	8.20	8.34	7.06	24.11	34.19	3.50
<b>2006</b>	2.14	8.73	11.03	2.05	13.25	11.71	2.66
<b>2007</b>	8.68	4.55	1.15	28.54	4.42	23.84	7.52
<b>2008</b>	7.40	24.29	8.45	15.73	6.53	47.54	13.24
<b>2009</b>	10.72	13.50	10.30	8.44	10.16	6.76	8.35
<b>2010</b>	13.80	23.30	21.30	4.54	10.15	21.15	0.29
<b>2011</b>	0.54	7.12	25.94	17.03	15.22	16.51	5.09
<b>2012</b>	3.95	3.24	12.37	18.51	0.63	5.17	3.85
<b>2013</b>	1.23	3.78	30.17	0.93	17.55	51.42	3.46

**\*Table 6**

**\*\*Please note that all these statistics exclude all military movements**