

## Country Profile: Namibia 2017

### 1. Global Tourism Performance of Namibia

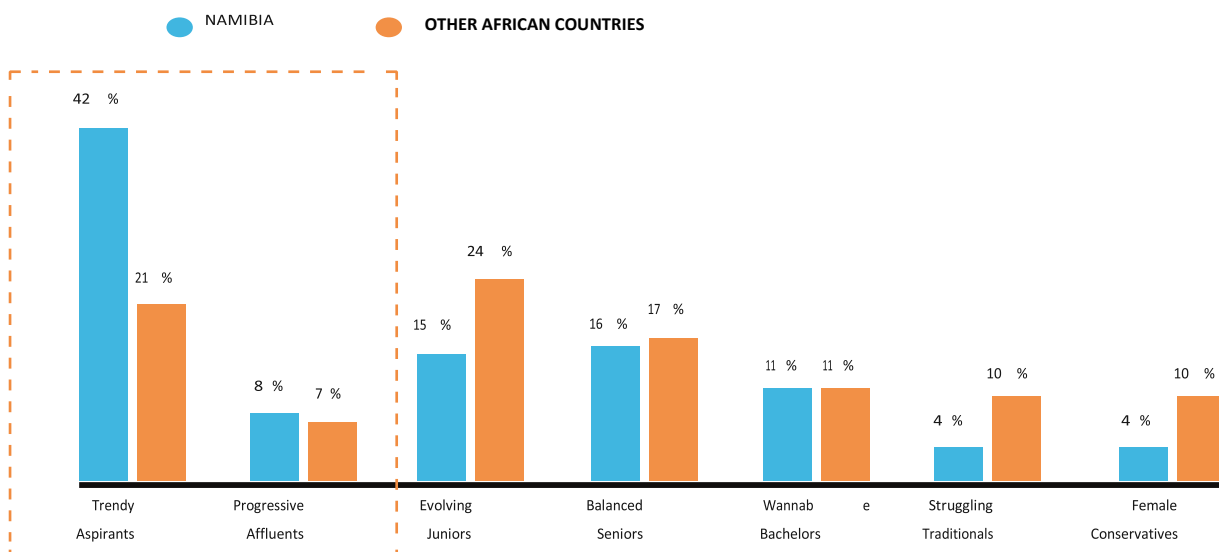
A higher percentage of Namibian consumers surveyed read newspapers and magazines and they are also more likely to use the Internet. In fact, nearly one-quarter of homes surveyed have a personal computer and an Internet connection, though this is largely confined to affluent segments. And while most consumers surveyed own a mobile phone, *Trendy Aspirants*, *Evolving Juniors*, and *Progressive Affluents* are much more likely to use it for advanced activities like browsing the web, using social media sites, or downloading apps.

Namibians are family oriented and planning for future is one of their major concerns. While trying new products ranks low in terms of priority for an average Namibian, young adults like Samuel are willing to experiment and keep up with the latest technology and fashion trends.

Due to multiple factors, sizes of consumer segments in Namibia are notably different from other countries studied. This resulted in high membership of certain segments while others had low representation.

The following segments are represented by few consumers and therefore the data for these individual segments should be assumed to have lower accuracy levels than other data points and should only be used directionally: *Progressive Affluents*, *Struggling Traditionals*, and *Female Conservatives*.

At 93 percent penetration, the mobile phone is a central part of life for most Namibians. While text messaging is used by almost everyone, four out of 10 mobile phone users said that they access the Internet directly on their mobile phone. Almost one in three mobile phone users—especially *Trendy Aspirants*, *Evolving Juniors* and *Progressive Affluents*—use picture messaging/MMS, download music downloads, listen to the radio, or access social networking websites. TV (86%) and radio (78%) are widely popular and Namibia has higher penetration of newspaper (86%), magazines (60%) and Internet (51%) compared to other Sub-Saharan countries surveyed. This is driven by high literacy (89%) and greater concentration of affluent consumer segments such *Progressive Affluents* and *Trendy Aspirants*.



## 1.1 Global Tourism Market Insights on Namibia

Namibia is the seventh most business friendly country in Africa. Namibia's economy, political stability and per capita income have consistently ranked among the best in Africa. In comparison to other Sub-Saharan countries surveyed, it's easier to reach out to consumers in Namibia as they are better educated and well connected through media. The affluent consumer segments in Namibia are brand loyal and willing to pay more for better and faster service. The low population density in rural areas can be a hindrance for making deep inroads into the country, however, a fast growing urban population in Namibia and a large affluent consumer base offers a multitude of opportunities for potential investors.

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Nielsen identified seven consumer segments based on a face to face survey of 5,000 respondents across Nigeria, Ethiopia, Uganda, Kenya, Tanzania, Zambia and DRC. Variables used were: attitudes, age, socio-economic class, education level, and mobile and media usage. The family theme reverberates strongly across all groups, as does affordability and trusting the same brand. However, segments vary in terms of other purchase drivers and media consumption.

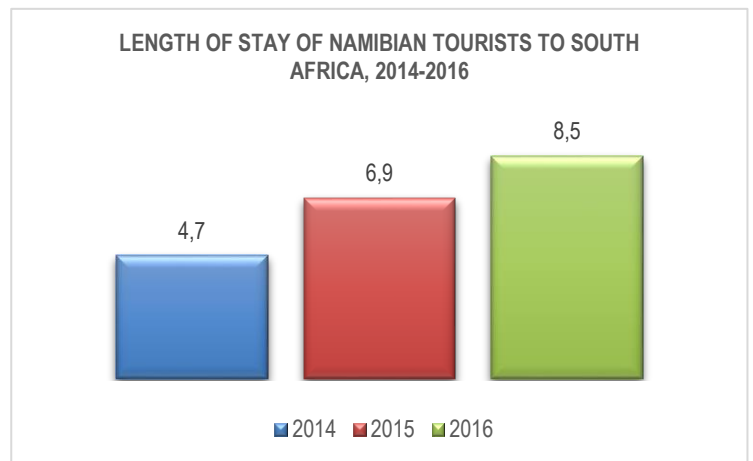
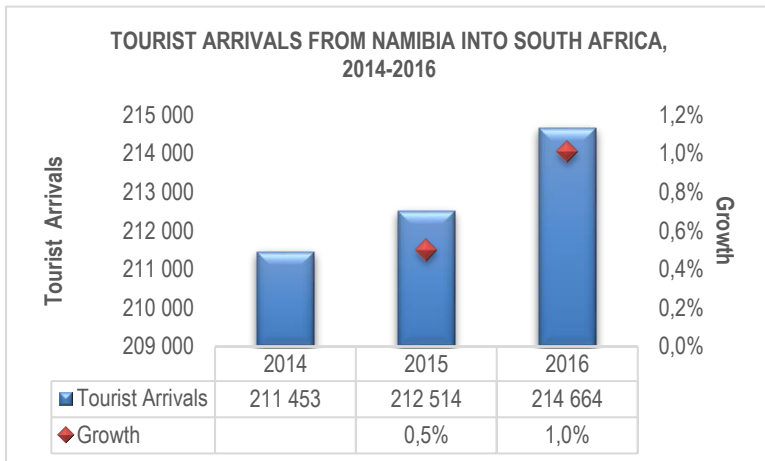


Trendy Aspirants	42%	15-29 years, single, largely male, middle SEC, urban	Educated up to secondary school and above. Modern in terms of fashion, technology, and willingness to try new products.
Balanced Seniors	16%	20-45 years, married with children, across all SEC	Studied secondary school and above. Traditional, family-oriented and religious. Buy based on affordability and recommendation.
Evolving Juniors	15%	15-19 years, middle to lower SEC, peri-urban	Mostly students. Social and want to enjoy time with friends. Traditional and family-oriented. Value affordability. Average consumption of TV, radio and mobiles.
Wannabe Bachelors	11%	20-34 years, male, middle to low SEC, single, peri-urban	Educated up to secondary school. Mix of blue collar and supervisor level jobs. Influenced by good packaging and advertising.
Progressive Affluents	8%	30-45 years, married with children, higher SEC, urban	Well educated, and employed in managerial jobs. Willing to try new things and pay for quality. Family is important but also tends to be very individualistic. High on media use.
Female Conservatives	4%	15-29 years, married, lower SEC, peri-urban	Studied up to secondary level. Traditions and family values are important. Not brand conscious. Keen to keep up with fashion and try new products.
Struggling Traditionals	4%	30-45 years, married with children, lower SEC, peri-urban	Low levels of education - secondary school and below. Rooted in family, traditions and religion. Prime concerns are affordability and availability. Not brand conscious.

## 2. National Performance of Namibia in South Africa

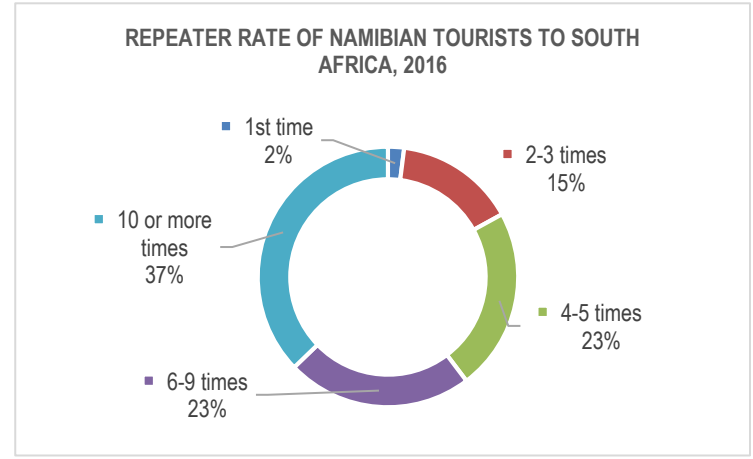
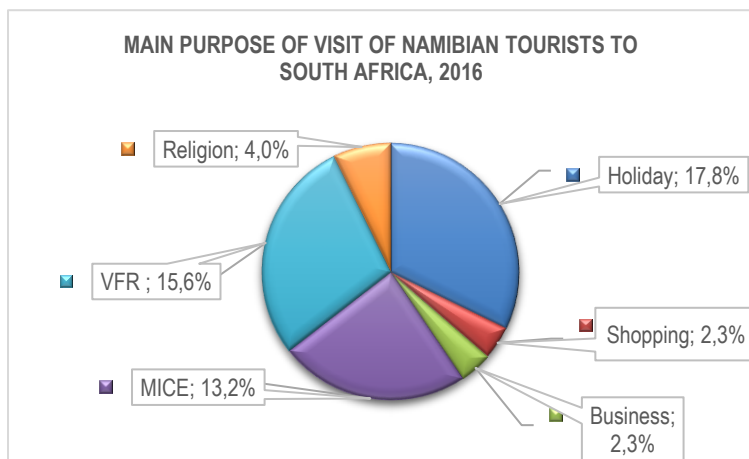
South Africa receives one of the highest tourist arrivals in Africa from Namibia. Amongst all three years the highest tourist's arrivals from Namibia were in 2016.

Namibian tourists have one of the longest length of stays amongst African markets to South Africa. The length of stay amongst Namibian tourists have also increased since 2014 to 2016, therefore Namibians choosing to stay longer while on holiday in South Africa.



Research has shown that Namibian tourists predominantly travel to the country for holiday and visiting friends and family. Religion also seems to be a favourable purpose of visit amongst Namibian tourists unlike with other African countries.

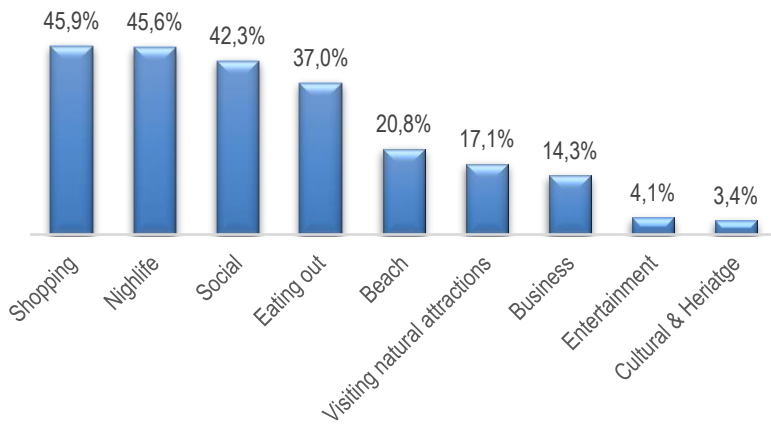
Namibians enjoy travelling to the country for repeat visits as seen in the data below, which could be the brand loyal aspect. Therefore continued good service and value for money experiences for this market in the country is very important to keep Namibia as one of the sustainable repeat holiday markets to our shores.



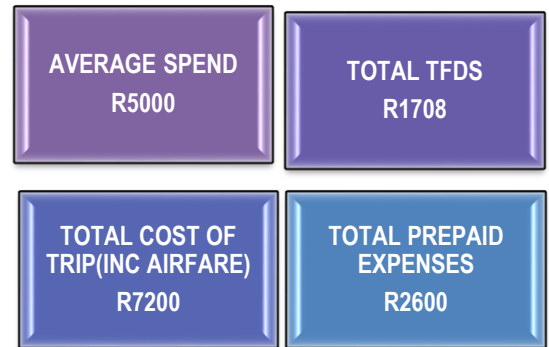
South Africa seems to be a hotspot for nightlife and shopping amongst Namibian tourists. Therefore more shopping and nightlife experiences is a great way to target the Namibian tourist.

The spend data for Namibian tourists visiting South Africa illustrates a low but positive spend from Namibian tourists.

**MAIN ACTIVITIES OF NAMIBIAN TOURISTS TO SOUTH AFRICA, 2016**



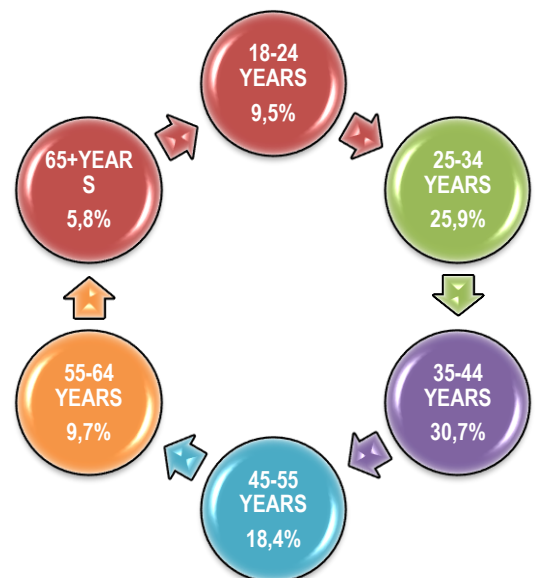
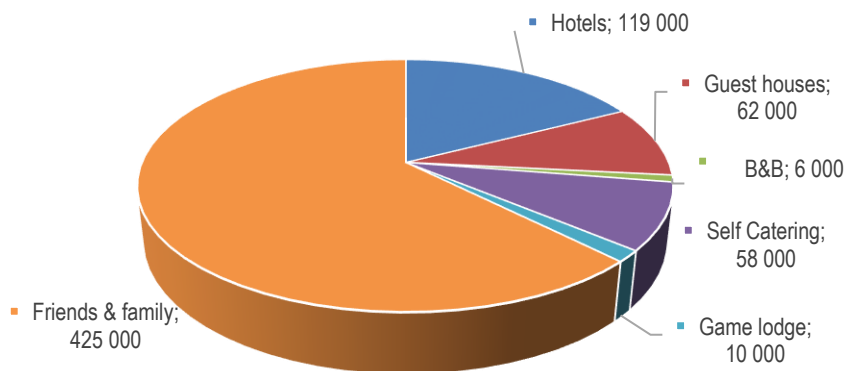
**SPEND DATA OF NAMIBIAN VISITOR TO SOUTH AFRICA**



The Namibian tourists prefer to stay with friends and family as their main choice of accommodation, due to the fact that many Namibian tourists are very family orientated which has influence on their choice of accommodation and many Namibians have family living in South Africa.

The majority of Namibian tourists to South Africa are your middle aged group with high education and more disposable incomes, which also explains the high average spend by Namibian tourists.

**MAIN ACCCOMMODATION USED BY NAMIBIAN TOURISTS TO SOUTH AFRICA, 2016**

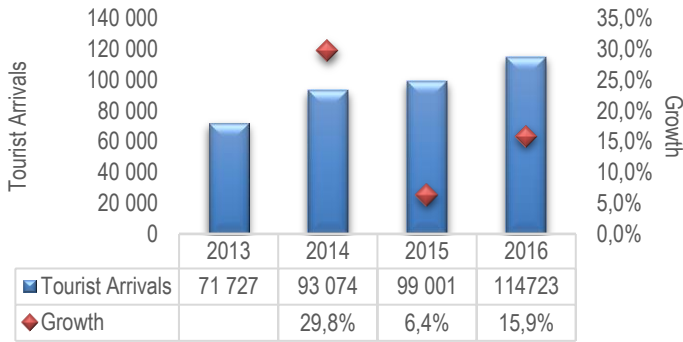


### 3. Provincial Tourism Performance of Namibia in the Western Cape.

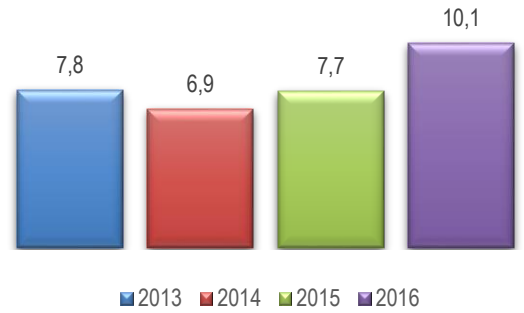
The Western Cape received positive number of tourist's arrivals from Namibia with double digit growth. Tourist's arrivals from Namibia increased quite well in 2016 compared to the previous year.

Namibian tourists stay approximately a week in the Western Cape, illustrating an increase of length of stay in the province when you compare it to the previous years.

**TOURIST ARRIVALS FROM NAMIBIA INTO THE WESTERN CAPE, 2013-2016**



**LENGTH OF STAY FOR NAMIBIAN TOURISTS TO THE WESTERN CAPE, 2013-2016**



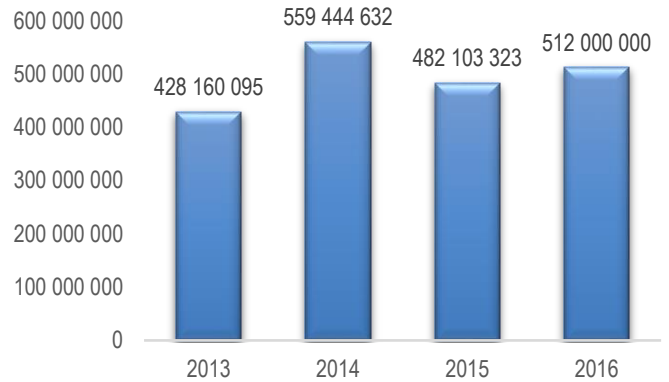
The Western Cape received a positive number of bednights from the Namibian market, the bednights increased dramatically in 2016 when compared to the previous year to reach over million bednights.

In 2016, the total foreign direct spend from the Namibian market for the province was positive, making positive contribution to the economy of the Western Cape.

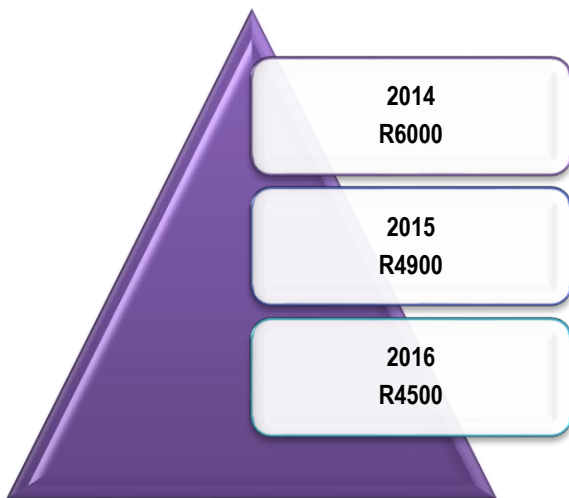
**TOTAL NUMBER OF BEDNIGHTS FOR NAMIBIAN TOURISTS TO THE WESTERN CAPE, 2016**



**TOTAL FOREIGN DIRECT SPEND OF NAMIBIAN TOURISTS TO THE WESTERN CAPE, 2013-2016**



The average spend of Namibian tourists has gone down since 2014 and spend patterns illustrate much lower spend from this market.



### Recommendations

- The affluent consumer segments in Namibia are brand loyal and willing to pay more for better and faster service. Therefore, offering the Namibians easy accessible information and convenience when booking holidays to the province could encourage them to remain loyal to visit the province as one of their favourite holiday places.
- Namibians also enjoy shopping and nigh life so using this in marketing campaigns would be great idea to target the Angolan market and love festivals as well so the Cape Town festival could be draw card.
- It's easier to reach out to consumers in Namibia as they are better educated and well connected through media, therefore using media as means of targeting Namibians to come to our shores good be good marketing strategy.

## List of sources

- World Travel & Tourism Council Report,2016
- STB Market Insights Namibia 2016
- South African Tourism, 2017
- Nielsen's Consumer Media View 2017