

A large, faded, dark blue portrait of a man with curly hair and a beard is visible on the left side of the cover, serving as a background for the text.

ESWATINI TOURISM AUTHORITY

DOMESTIC TOURISM REPORT

2019

BACKGROUND

The Government of Eswatini has declared Tourism as one of the five pillars to drive economic growth over the next 5 years ending 2023 as outlined in the Strategy Road Map. Domestic tourism is an essential contributor to the growth of the tourism sector and provides a foundation for sustainable tourism growth and development. This is especially the case in the prevailing times of global uncertainty. Amongst the imperatives is improvement of economic benefits within the tourism supply chain and in particular for the tourism SMME sector. Increased participation of the local market is envisaged to result in a smoothened seasonality pattern in tourism related visitations which will translate to creation and sustenance of all -year round jobs.

The Domestic Tourism Report 2019 provides insights on the demographics, travel choices, accommodation and attraction preferences and experiences of locals in their engagement with the local product. The target population of the study were Emaswati who are above 21 years or older and earn a salary above an annual bracket of E42,000.00 regardless of whether they have travelled within the country for leisure purposes. The survey process entailed collation of data through telephone interviews where a representative sample of Emaswati were requested to provide information relating to their travel patterns, experiences and factors that influence their travel choices.

The survey provides data on the status of domestic visitor demands and inform planning of tourism product development and marketing strategies by ETA and industry players. Specifically, the domestic tourism survey reinforces ETA's efforts to achieve its goal of increased geographic spread, increased length of overnight stay and increased tourism receipts

The Report is available to tourism partners and the general public for downloading from the ETA website www.thekingdomofeswatini.com in the section "Research Documents". For further information on this study, please email [statistics @tourismauthority.org.sz/data@-tourismauthority.org.sz](mailto:statistics@tourismauthority.org.sz/data@-tourismauthority.org.sz).



Domestic travel by Emaswati comprises of both day trips and overnight travel within Eswatini.



Day visitors refers to Emaswati who travel a round trip distance away from their usual environment and do not spend a night away.



Overnight trips entail stays away from home of at least one night, at a place or location at least 10 kilometres away from the usual environment.

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HIGHLIGHTS

According to the Domestic Tourism Survey 2019 findings, a total of 65.4% Emaswati reported to have engaged in leisure domestic travel in 2018/2019. Domestic travelers were predominantly day visitors, with the proportion of the 'professionals' demographic, accounting for almost as twice as the next occupation segments of 'retired' and 'teachers'. The general pattern reflects that individuals within the Generation X category undertook the most day trips, these comprising of age groups 36-45 years and 46-55 years.



65.4%



34.6%



Day
Time
Visits

82.1%



Night
Time
Visits

17.1%



Professional **27.9%**

16.9%

Retired



Teacher **11.9%**

7.7%

Civil Servant



Age
36-45

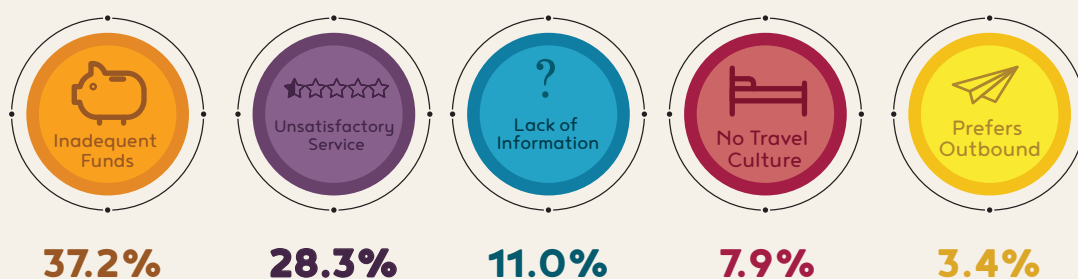
30.1%

Age
46-55

25.7%

REASONS FOR NOT TRAVELLING

Whilst the majority of adult Emaswati in the employment sector have had an opportunity to undertake a recreational trip within the country, a significant 34.6% did not undertake a holiday trip in 2018/2019. According to the survey findings, **the main inhibiting factors for non-travel included insufficient funds for what was considered as luxury or non-essential expenditures and unsatisfactory service levels offered to Emaswati, inadequate access to information on tourism attraction facilities and activities.** Also worth noting was the proportion that indicated to prefer outbound leisure travel to neighbouring countries which respondents largely attributed to uneven service delivery offered.



DOMESTIC TOURISM ACTIVITIES

2.1 Reasons For Travelling

Recreational travel accounted for the majority undertaken by Emaswati, while business represented 3.8% of travel outside the usual environment.

2 of 5 locals are willing to travel for leisure purposes over distances not exceeding 0-49 kms, while another 33% will travel for distances between 50 to 99kms

The typical travel partnership of most Emaswati who travel for recreational purposes is with family or friends and relatives. This is particularly observed in the age categories of 26-35 years and 36-45 years. The above 55 years categories were noted to travel mostly with their spouse/partner.



Age group	Alone	Spouse/ Partner	Family	Friends/ Relatives	Colleagues
21-25 years	0.0%	0.0%	0.0%	0.0%	0.0%
26-35 years	2.9%	9.3%	48.3%	31.2%	8.3%
36-45 years	2.7%	7.2%	58.9%	21.9%	9.3%
46-55 years	2.1%	7.8%	62.6%	18.0%	9.6%
56-65 years	34%	11.8%	61.8%	14.2%	8.8%
65 years +	5.6%	5.6%	57.3%	22.5%	7.9%
TOTAL	3.0%	8.2%	58.2%	21.6%	8.9%

TRAVEL ACTIVITIES



2.2 Travel Activities



Restaurant
Sit In
46.1%



Accommodation
9.4%



Casino
1.0%



Entertainment
34.9%



Festival
1.1%

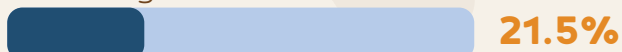


Culture
6.5%

2.3 Frequency of Travel

Approximately 2 in 5 local residents undertook recreational day trips at least once every quarter, while a slightly lesser proportion of 32.3% travelled for the day an average of 2 times a year in the 12 months review period

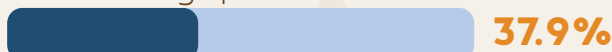
Once a year



Twice a year



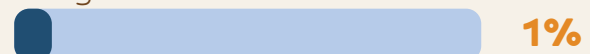
Once every quarter



Every month



Every week





TOP 10 ATTRACTIONS VISITED

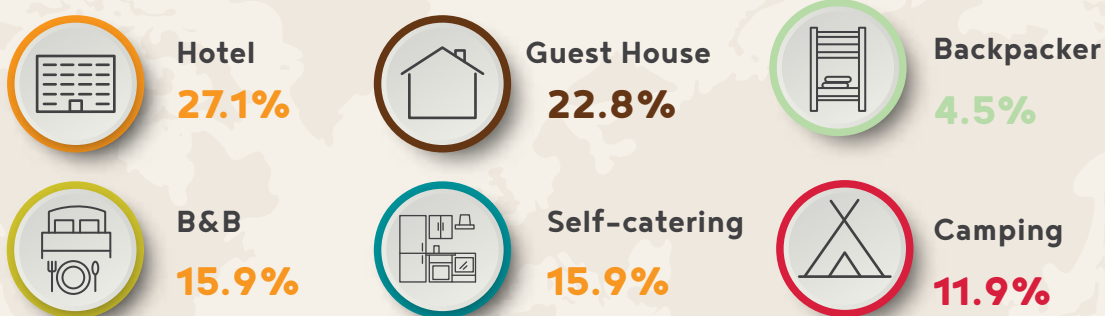
The main destinations for day activities were Game Reserves, closely followed by cultural based attractions.





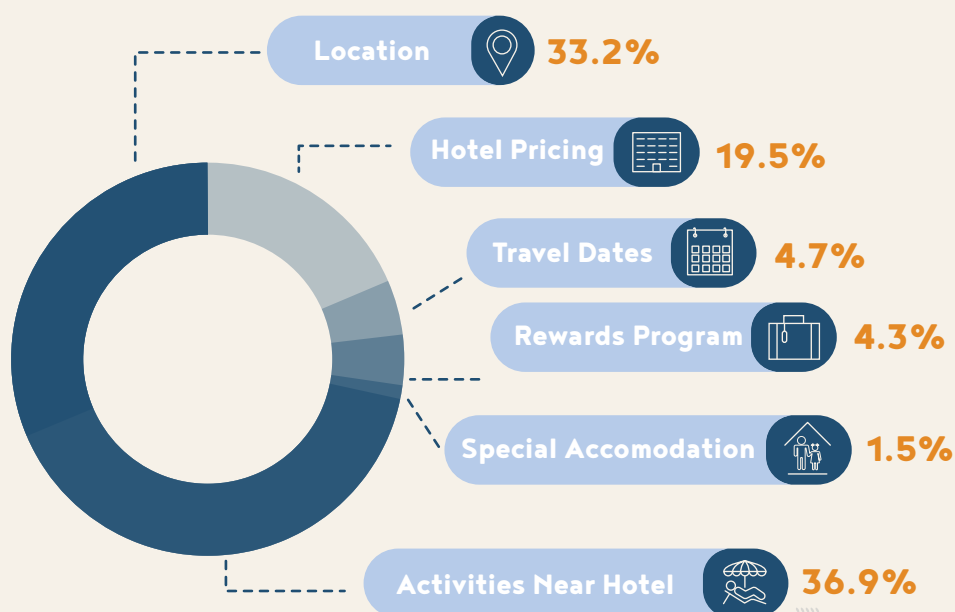
HOSPITALITY & ACCOMMODATION

3.1 Types of Accommodation



The main preferred type of accommodation for leisure domestic tourists was hotels (27.1%). Within the smaller sized facilities guest house (22.8%) was the dominated, followed by bed & breakfast (15.9%) and self-catering lodges (15.9%).

3.2 Factors Affecting Accommodation Types

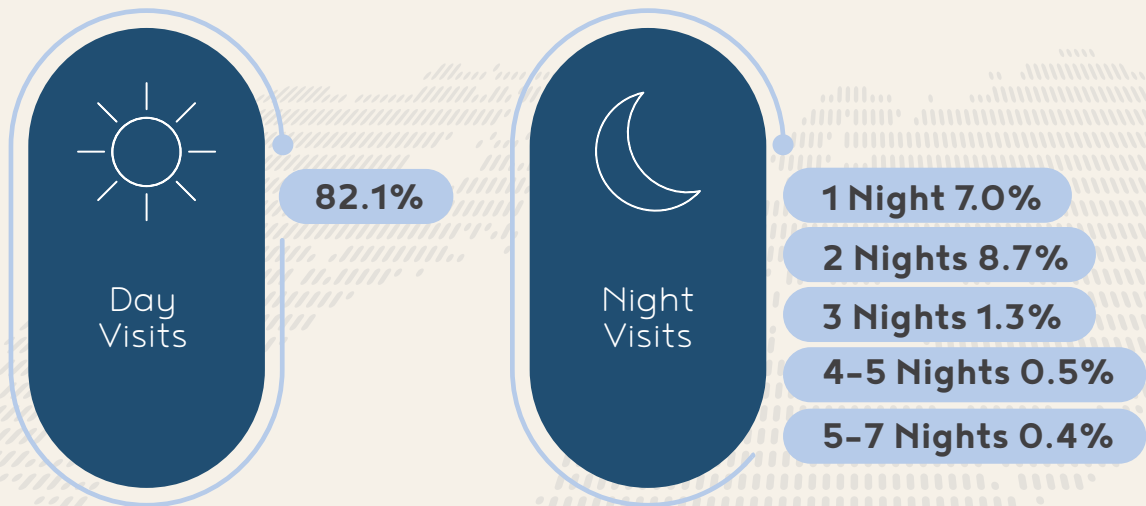


The main factors that influence choice of accommodation comprised of activities near the accommodation, the geographic location of establishment and pricing of the rooms.

Types of Accommodations and Age Categories

Age	Hotel	Guest House	B&B	SC	Camping	Backpacker
21-25 years	35.5%	25.8%	16.1%	9.7%	9.7%	3.2%
26-35 years	27.2%	22.2%	20.1%	12.1%	13.2%	5.3%
36-45 years	26.8%	21.8%	16.4%	16.5%	12.3%	6.2%
46-55 years	27.7%	24.4%	15.7%	17.9%	11.0%	3.3%
56-65 years	27.3%	24.4%	18.7%	14.0%	12.7%	2.9%
65+ years	28.8%	23.8%	16.9%	17.5%	9.4%	3.8%
TOTAL	27.4%	23.1%	17.2%	15.7%	11.9%	4.6%

3.3 Duration of Stay

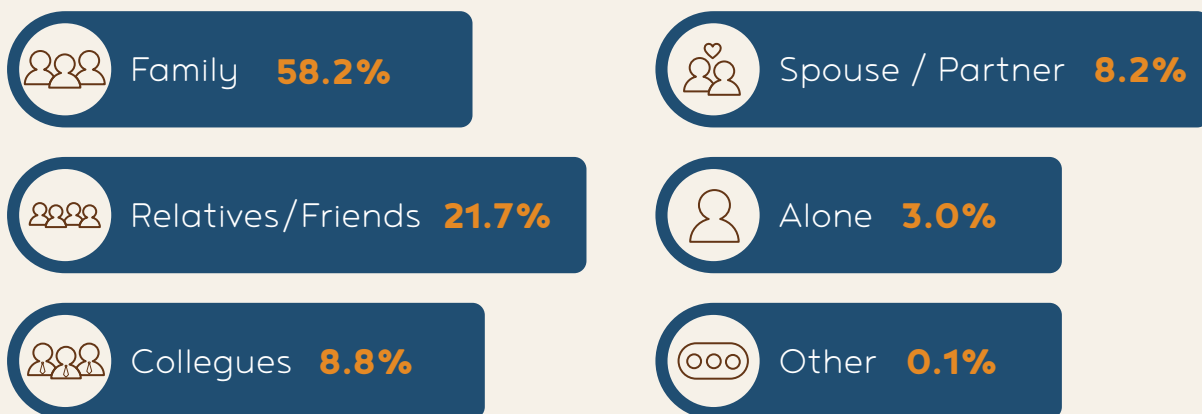


8 of 10 domestic leisure travelers undertake day visits and do not spend a night in formal accommodation.

Domestic overnight guests recorded an average stay of 2 nights, with 21-25 age group spending the most nights at an average of 2 nights.

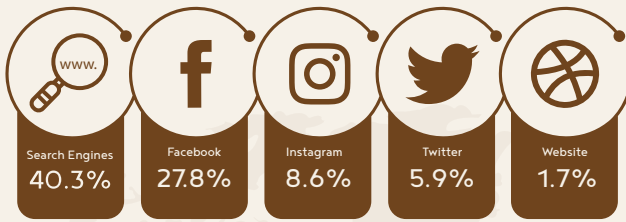
A larger proportion of domestic overnight guests opted for hotels which were mainly incentive by the offer of discounts and reward programs.

3.4 Travel Partnerships



TRAVEL PREFERENCES

Online Platforms



Sources of Travel Information

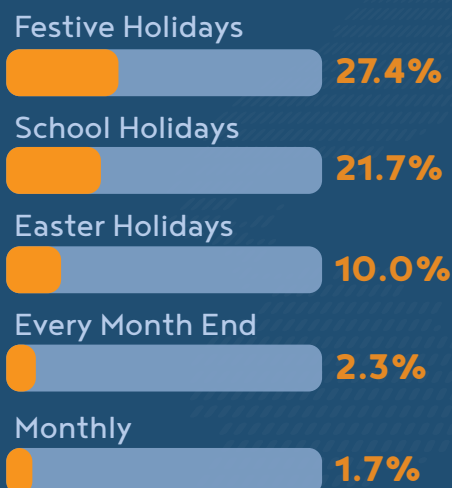
	Friends & Relatives	33.5%
	Newspaper/Magazines	28.7%
	Colleagues/Work	14.3%
	Booking Sites	11.7%
	Social Media	6.6%
	Tourism Info Office	3.1%
	Television	2.1%

Emaswati mainly rely on word-of-mouth referencing from friends and relatives in the selection.

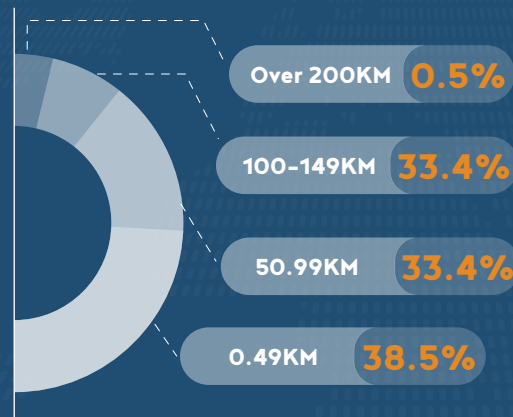
Local newspapers and magazines are also key sources of domestic holiday travel information.

A considerable proportion of locals also refer to online booking sites and corporate relations for leisure news

Travel Times



Preferred Travel Distance



A majority of domestic leisure travel takes place during school holidays, the festive season and Easter holidays. Preferred Travel Distance of 2 of 5 locals are willing to travel for leisure purposes over distances not exceeding 0-49 kms, while another 33% will travel for distances between 50 to 99kms.

DOMESTIC EXPENDITURE

Av. Spent Per Night



Hotel
E947.64



Guest House
E709.22



B&B
E599.32



Self-catering
E736.06



Camp Site
E421.46



Backpacker
570.83



Other
E600



Total
E2,964.87

On average, a Liswati spends E711.24 in restaurant and E711.95 for entertainment per trip.

While a sizeable 9.4% spend at least a night in formal accommodation, an average expenditure of E2,964.87 is spent per trip.

Hotels (E947.64), Guest Houses (E709.22) and self-catering facilities (E736.06) account for the higher average expenditures in accommodation per trip.

Av. Spent Per Trip

Transport Per Trip **E463.01**

Entertainment **E711.95**

Other **E785.71**

Restaurant **E711.24**

Accommodation **E1,656.22**

TOTAL **E1,543.04**

WHAT LIES AHEAD?

ETA has set out what needs to be achieved over the next year, through formulation of strategic thrusts. **The most critical of these tactical goals is to increase domestic tourism contribution as a percentage of the overall contribution to GDP in 2020.** The following selected actions have identified as pivotal towards conversion of typical Liswati into a future domestic tourist.



Dual Rates

Introduction of dual rates in accommodation and attraction sites.



Holiday Packages

Customised holiday packages.



Utilise Facebook

Utilise Facebook for promotion and information on domestic travel



Awareness Campaigns

Increase in domestic tourism awareness campaigns.



Spread Of Tourism Attractions


Geographic spread of tourism attractions outside the Mbabane–Manzini corridor

ANNEX


Highlights




*Age category * Travel Partnership*




*Age Category * Accommodation*




*Travel in Eswatini * Age Category
* Online Platforms*




*Activities Engaged In * Age Category*




*Activities Engaged In * Profession*




*Profession * Travel in Eswatini*



*Profession * Travel Frequency*




*Travel Frequency * Preferred time to travel*




*Travel in Eswatini * Source of Information*




*Travel frequency * Accommodation*




*Travel partnership * Accommodation*



*Preferred time to travel * Source of Information*



Expenditure behavior



Preferred amount to pay per night

Age category * Travel Partnership

Age	Alone	Spouse/ Partner	Family	Friends/ relatives	Colleagues
21-25 years	0.0%	0.0%	0.0%	0.0%	0.0%
26-35 years	2.9%	9.3%	48.3%	31.2%	8.3%
36-45 years	2.7%	7.2%	58.9%	21.9%	9.3%
46-55 years	2.1%	7.8%	62.6%	18.0%	9.6%
56-65 years	3.4%	11.8%	61.8%	14.2%	8.8%
65+ years	5.6%	5.6%	57.3%	22.5%	7.9%
TOTAL	3.0%	8.2%	58.2%	21.6%	8.9%

Age Category * Accommodation

Age	Hotel	Guest House	B&B	SC	Camping	Backpacker
21-25 years	35.5%	25.8%	16.1%	9.7%	9.7%	3.2%
26-35 years	27.2%	22.2%	20.1%	12.1%	13.2%	5.3%
36-45 years	26.8%	21.8%	16.4%	16.5%	12.3%	6.2%
46-55 years	27.7%	24.4%	15.7%	17.9%	11.0%	3.3%
56-65 years	27.3%	24.4%	18.7%	14.0%	12.7%	2.9%
65+ years	28.8%	23.8%	16.9%	17.5%	9.4%	3.8%
TOTAL	27.4%	23.1%	17.2%	15.7%	11.9%	4.6%

Travel in Eswatini * Age Category * Online Platforms

	Age	Facebook	Twitter	Instagram	Website	Search Engines
YES	21-25 years	42.4%	3.0%	21.2%	15.2%	18.2%
	26-35 years	32.4%	8.3%	12.7%	12.7%	34.0%
	36-45 years	29.6%	6.5%	10.0%	14.3%	39.5%
	46-55 years	20.1%	4.4%	3.8%	26.3%	45.3%
	56-65 years	19.5%	3.9%	3.1%	20.3%	53.1%
	65+ years	24.0%	0.0%	0.0%	28.0%	48.0%
	TOTAL	27.2%	6.0%	8.6%	17.6%	40.5%
NO	26-35 years	42.9%	54%	10.7%	7.1%	33.9%
	36-45 years	24.6%	4.6%	4.6%	16.9%	49.2%
	46-55 years	28.6%	7.1%	4.8%	16.7%	42.9%
	56-65 years	29.4%	5.9%	5.9%	11.8%	47.1%
	65+ years	33.3%	0.0%	33.3%	0.0%	33.3%
	TOTAL	31.7%	5.5%	7.1%	13.1%	42.6%

Activities Engaged In * Age Category

Activity	21-25 yrs	26-35 yrs	36-45 yrs	46-55 yrs	56-65 yrs	65 yrs+
Festival	5.7%	26.4%	34.0%	24.5%	5.7%	3.8%
Restaurant	1.8%	16.1%	32.0%	26.5%	16.6%	7.0%
Casino	0.0%	7.9%	42.1%	34.2%	13.2%	2.6%
Cultural	1.3%	15.2%	26.8%	29.0%	18.8%	8.9%
Nature	1.3%	15.7%	34.9%	26.2%	15.5%	6.4%
Wildlife	0.7%	15.0%	33.5%	26.5%	17.0%	7.2%
Community	0.0%	23.1%	15.4%	23.1%	38.5%	0.0%
Sports & Recreation	3.1%	21.9%	28.1%	30.2%	12.5%	4.2%

Activities Engaged In * Profession

Activity	Teacher	Civil Servant	Self Employed	Retired	Unemployed	Student	Driver	Professional	Sales	Skilled
Festival	9.8%	13.7%	21.6%	7.8%	2.0%	2.0%	0.0%	27.5%	5.7%	13.7%
Restaurant	12.8%	8.8%	13.1%	10.7%	2.4%	1.0%	1.0%	38.2%	16.6%	11.2%
Casino	15.8%	7.9%	2.6%	5.3%	7.9%	0.0%	0.0%	44.7%	13.2%	13.2%
Cultural	16.5%	7.6%	13.4%	14.3%	2.2%	0.4%	0.9%	33.5%	18.8%	11.2%
Nature	14.7%	9.4%	11.4%	10.8%	2.6%	0.5%	1.9%	34.5%	15.5%	13.6%
Wildlife	15.3%	8.4%	11.0%	12.6%	2.9%	0.3%	1.7%	34.5%	17.0%	12.9%
Community	28.6%	0.0%	28.6%	21.4%	0.0%	0.0%	7.1%	7.1%	38.5%	7.1%
Sports & Recreation	11.6%	12.6%	12.6%	5.3%	3.2%	4.2%	2.1%	30.5%	12.5%	18.9%

Profession * Travel in Eswatini

Profession	Yes	No
Teacher	79.0%	21.0%
Civil Servant	74.3%	25.7%
Self Employed	60.6%	39.4%
Retired	43.5%	56.5%
Unemployed	26.2%	73.8%
Student	61.5%	38.5%
Driver	67.9%	32.1%
Professional	82.3%	17.7%
Sales	60.0%	40.0%
Skilled	67.8%	32.2%
TOTAL	65.4%	34.6%

Profession * Travel Frequency

Profession	Once a year	Twice a year	Once every quarter	Every Month	Every Week
Teacher	29.8%	35.1	31.6%	3.5	0.0
Civil Servant	21.1%	37.6%	33.0%	6.4%	1.8%
Self Employed	18.2%	30.7%	38.0%	8.8%	4.4%
Retired	38.1%	32.1%	25.4%	4.5%	0.0%
Unemployed	23.5%	35.3%	38.2%	2.9%	0.0%
Student	28.6%	28.6%	42.9%	0.0%	0.0%
Driver	38.9%	44.4%	16.7%	0.0%	0.0%
Professional	12.2%	30.4%	45.9%	10.8%	0.7%
Sales	0.0%	50.0%	50.0%	0.0%	0.0%
Skilled	25.8%	32.9%	34.8%	5.8%	0.6%
TOTAL	21.7%	32.7%	37.4%	7.3%	1.0%

Travel Frequency * Preferred time to travel

Frequency	School Holidays	Easter Holidays	Festive Holidays	Every Month-end	Weekend	Monthly
Once a year	24.1%	4.2%	35.6%	0.0%	1.4%	0.9%
Twice a year	23.6%	13.4%	29.3%	0.0%	3.6%	0.0%
Once every quarter	21.8%	12.2%	23.7%	1.2%	5.9%	0.5%
Every month	6.9%	1.4%	20.8%	2.4%	2.8%	19.4%
Every Week	14.3%	0.0%	0.0%	0.0%	14.3%	28.6%
TOTAL	21.8%	10.2%	27.8%	2.2%	4.1%	1.8%

Travel frequency * Accommodation

Frequency	Hotel	Guest House	B&B	SC	Camping	Backpacker
Once a year	27.9	24.8%	18.1%	17.5%	9.2%	2.5%
Twice a year	25.7%	24.1%	17.8%	14.8%	11.6%	6.0%
Once every quarter	27.1%	22.1%	16.3%	15.9%	14.1%	4.4%
Every month	28.7%	18.9%	15.9%	17.7%	13.4%	5.5%
Every Week	29.2%	12.5%	20.8%	16.7%	4.2%	16.7%
TOTAL	27.0%	23.0%	17.2%	16.0%	12.1%	4.7%

Travel in Eswatini * Source of Information

	Social Media	Booking Sites	Newspaper/Magazines	Friends/Relatives	Television	Tourism Information Office	Colleagues/work
YES	6.6%	11.7%	28.7%	33.5%	2.1%	3.1%	14..3%

Preferred time to travel * Source of Information

	Social Media	Booking Sites	Newspaper/Magazines	Friends/Relatives	Television	Tourism Information Office	Colleagues/work
School Holidays	6.0%	14.4%	34.9%	27.9%	1.2%	3.3%	15.3%
Easter Holidays	7.9%	14.1%	31.7%	28.2%	0.9%	1.8%	15.4%
Festive Holidays	7.4%	14.0%	28.9%	33.3%	1.7%	1.5%	12.7%
Every Month-end	4.4%	8.9%	33.3%	44.4%	0.0%	2.2%	6.7%
Weekends	12.1%	14.3%	20.9%	37.4%	1.1%	2.2%	12.1%
Monthly	9.8%	12.2%	29.3%	29.3%	0.0%	9.8%	9.8%
TOTAL	6.6%	12.0%	29.0%	33.2%	2.2%	3.1%	14.0%

Travel partnership * Accommodation

	Hotel	Guest House	B&B	Self Catering	Camp Site	Backpacker
Alone	25.4%	20.3%	16.7%	16.3%	6.5%	14.7%
Spouse/Partner	27.0%	21.15%	15.7%	17.7%	8.1%	10.0%
Family	26.3%	17.8%	16.1%	18.6%	9.3%	11.8%
Friends/Relatives	26.6%	18.3%	16.0%	16.9%	11.3%	10.9%
Colleagues	24.5%	18.6%	16.4%	19.1%	10.3%	11.2%
Other	50.0%	0.0%	0.0%	0.0%	50.0%	0.0%
TOTAL	27.5%	23.3%	17.0%	15.7%	12.0%	4.5%

Expenditure behavior

	Av. Spent Per Trip
TOTAL	E2964.87
Accommodation	E1656.22
Restaurant	E711.24
Entertainment	E711.95
Transport per trip	E463.01
Other	E785.71

AV. spent per night

	Av. Spent Per Night
Hotel	E947.64
Guest House	E709.22
B&B	E599.32
Self-catering	E736.06
Camp Site	E421.46
Backpacker	E570.83
Other	E600.00



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