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Annual Report

Tourism Statistics 2008

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i. Executive Summary

2008 was clearly a year of concern for the tourism sector in Swaziland. This was the first year the country recorded a decline in international visitor arrival figures, a fall of 3.6 percent from 1,230,092 in 2007 to 1,186,000 in 2008. The year was characterized by a financial turmoil in leading world economies which resulted in the near collapse of global financial sectors. As the economic conditions worsened in the second part of 2008, consumers grew to be more vigilant about economizing wherever possible. This resulted in the travel item within household budgets being halted.

South Africa and Mozambique remained key to the country's tourism sector, and this is reflected in the 83 percent share of total arrivals recorded in 2008. Both markets performed less favorably leading to an overall decline in visitor numbers. As early as February, the performance of overseas markets registered gloomy results and as the year progressed prospects for any growth diminished due to global economic conditions. Demand for travel amongst European consumers fell drastically, with markets such as Germany, Netherlands, Italy and Switzerland failing dismally. Despite the sharp fall in fuel prices noted in the last quarter of 2008, consumers remained uncertain about their financial situation resulting in curbed travel demand. On a more positive note, growth was recorded in the last quarter of 2008 giving some hope of Swaziland's appeal as a holiday destination, with visitor arrivals growing by 1.7 percent during the holiday season of October to December.

Leisure travel was listed as the main reason for visiting Swaziland accounting for 45 percent of visits. While the proportion of recreational travel continues to be the highest, a decline of 2.3 percent was noted in 2008. A similar trend was noted with business travel which fell by 0.7 percent to 12.7 percent. An unexplained 12.9 percent share increase of "other purposes" i.e. religious, medical, etc. was registered to record 22.2 percent.

More than half of those interviewed were in the age group of 25-44 years. While the median/ average age group remained unchanged at 35-44 years, the proportion of retirees declined in the past year. The decline resulted from the sharp fall in overseas visitor arrivals that are predominantly above 45 years.

The study concludes that despite the global challenges faced, travelers to Swaziland indicated they are now visiting the destination more frequently with 96 percent stating they would recommend a visit to Swaziland. Within this group "once a year" holiday repeat visits grew from 7.9 percent to 12.3 percent while "twice a year" holiday repeats grew by 1.4 percent. Interviewed repeat visitors cited "more things to do" as the primary reason for the increased visitation as well as "new/ better attractions" including entertainment/ events and accommodation facilities.

Chapter 1 Introduction

This report provides a summary of key statistics on international arrivals, accommodation usage and information on the performance of Swaziland's top 10 visitor generating markets. Analysis has been based on three visitor studies conducted on an annual basis; the Exit Survey - a study launched in 2004 which is aimed at giving a better understanding on the motivation of visitors to Swaziland, what they do during their stay, their consumption habits, and what feelings and opinions they develop as a result of the visit, and; the Day Visitor Survey which allows for better accuracy in identifying the size of the market for specific products, visitors spend by product and to confirm the travel pattern and interests of both domestic and international travelers. Both surveys include questions on demographics, trip purpose, transportation modes used, length of stay, trip planning, activities, expenditure, satisfaction, etc. Incorporated in this report is also an analysis on accommodation usage compiled and published by the Central Statistics. This survey is administered through a Monthly Accommodation Survey questionnaire where information pertaining to number of guests, room and bed occupancy, length of stay and tourist expenditure is gathered. Comparisons made in this report ranges between the periods 2005-2008 and year-on-year comparisons with 2007 results. The approach used in the listed studies is in compliance with UNWTO guidelines and has some additional questions based on national interests.

In the area of establishing a Tourism Satellite Account (TSA) for Swaziland, STA has been involved in the formation of a Tourism Satellite Account Technical Committee (TSATC) comprised of key tourism statistics producers and users within government ministries and organizations. The main focus has been to strengthen the quality and coverage of statistics on cross-cutting issues both on the supply and demand side, giving high priority to monitoring progress towards the establishment of a fully fledged Satellite Account. Focus in 2008 was undertaking a review of the core tourism datasets, which has resulted in better co-ordination, and consistency between datasets allowing for easier analysis of the information.

The under listed tables are included at the end of the report.

Table 1-9	Exit Survey Data Tables
Table 10	Day Visitor Survey
Table 11	Accommodation Data

An electronic version of this report and previous annual reports and monthly arrival statistics is available on the web pages under the address <http://www.welcometoswaziland.com>.

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Chapter 2 Global Performance

“International Tourism Challenged by Deteriorating Global Economy”

2.1 Inside the Regions

In 2008, international tourist arrivals reached 924 million, up 16 million over 2007, representing a growth of 2%. As a result of the extremely volatile world economy (financial crisis, commodity and oil prices, sharp exchange rate fluctuations), tourism demand slowed significantly through the year. The last six months of 2008, in particular, showed an abrupt shift in trends, with international tourist arrivals flat or showing negative growth. Overall, the 5% growth between January and June gave way to a 1% decline in the second half of the year. Growth was negative in the last six months of 2008 in both Europe (-3%) and Asia (-3%), where the drop is even more significant given its double-digit growth in 2007 and strong showing in the first part of 2008 (+6%). On the other hand, the Americas (+1%), Africa (+4%) and Middle East (+5%) still posted positive results in the second half of the year, although with a significant slowdown compared with the period between January and June. For the year as a whole, all regions were positive except Europe, which suffered stagnation in arrivals. The best performances were registered in the Middle East (+11%), Africa (+5%) and the Americas (+4%).

In **Europe** the flat results reflect the negative performances of Northern and Western Europe, the only sub regions with Oceania to show a decline over 2007, and the stagnation of destinations in Southern and Mediterranean Europe.

Asia and the Pacific's growth (+2%) is well behind its 2007 level (+11%). The above average results in South-East (+4%) and South Asia (+4%) were not sufficient to compensate for the sharp slowdown on growth of North-East Asia (+0.4%) and the decline of Oceania (-1.5%).

Results for the **Americas** show the strength of traffic to USA up to August (North America is up by 3%) and the favourable performance of most Central and Southern American destinations. The Caribbean was actually the only sub region in the world to perform better in 2008 than in 2007, but this was still only slight improvement (from 0.1% in 2007 to 1.2% in 2008).

The **Middle East** continued its rapid expansion, with growth for the year estimated at 11%, the highest among world regions (data is still limited, though, and it is likely that this estimate will be revised).

Africa's growth (+5%), though at half the level achieved in 2007, was still comparatively positive during the second half of the year. North African destinations did particularly well.

2.2 Prospects for 2009

The economic downturn, combined with the current uncertainties, extreme market volatility and a decline in both consumer and business confidence, are expected to continue taking their toll on demand for tourism – at least in the short to medium term. For 2009, the UNWTO Panel of Experts' prospects are at rock bottom with overall rating of 71. This is little more than half that was given to 2008's Prospects in January last year.

As the current troubled economic scenario is expected to continue well into 2009 and probably beyond, UNWTO's initial forecast for this year is for a very modest performance. UNWTO expects International tourism to stagnate (0%) or even decline slightly (-1% to -2%) during the year. But, there is still a high degree of uncertainty and much will depend on the evolving economic conditions. If the economy starts to show signs of an earlier recovery, international tourism might grow slightly in 2009 but, if the economy deteriorates further, then the current forecast might be revised downwards. Along with the Americas, Europe will be the most affected region in terms of overall tourism results as most of its source markets are already in, or entering into, recession. In Asia and the Pacific results are expected to be positive, although growth will continue to be slower compared with the region's performance in recent years. The same applies to Africa and the Middle East. Given the global uncertainty and with economic forecasts experiencing continued downward revisions, UNWTO will closely monitor developments to provide the most accurate analysis possible. Notwithstanding this assessment, UNWTO highlights the fact that the softening of international tourism growth follows four historically strong years:

- +7% a year on average between 2004 and 2007, or well above the 4% long-term trend;
- 2008, with an increase of 2%, still consolidated the particularly buoyant results of 2007 (+7%) but mainly due to the results of the first half of the year.

Chapter 3 Swaziland Overview

3.1 Overall Performance

Swaziland fell short of its anticipated target for visitor arrivals in 2008 as travel slowed due to the global economic downturn. A total of 1,186,000 visitor arrivals were recorded, reflecting a fall of 3.6% compared to the 1,230,092 in 2007. The Republic of South Africa (781,173), Mozambique (209,139), United Kingdom (21,581), Germany (19,111) and Netherlands (17,554) were Swaziland's top five visitor generating markets in 2008. These markets accounted for 88.4% of total visitor arrivals in 2008. Among the top 15 markets France (+6.0%), Portugal (+4.6%), Belgium (+3.9%) and, Sweden (+5.8%) registered growth. A number of emerging source markets were noted such as Brazil and China (including Hong Kong) who recorded impeccable growth throughout the year with visitor numbers climbing by 69.5 percent and 7.1 percent, respectively for the year 2008.

From as early as February 2008, a decline in visitor arrivals was noted, reflecting the presence of a global economic slowdown on consumer sentiments and discretionary spending. With the worsening of the global financial crisis key source markets such as RSA, UK and, USA failed to maintain the notable performance displayed in the earlier months of the year. As the year progressed the financial crisis became an economic turmoil directly affecting household incomes. Hardest hit source markets were initially from overseas markets such as Netherlands (-11.3%), Germany (-22.8%), USA (-0.6%), UK (-0.1%) and, Switzerland (-54.2%). However, the last quarter of 2008 saw RSA – Swaziland's main source market in terms of volume and overall tourism expenditure – experience the effects as major South African financial institutions introduced stiffer credit granting instruments thereby making it difficult to access credit. The continued hiking of fuel and food prices made it difficult for travel to compete with these basic necessities as consumers prioritized their disposable income spend.

However, we are confident that this crisis – like past global and regional devastations that impacted negatively on travel – will only temporarily dampen the holiday spirit. Over the years tourism has continued to demonstrate its resilience. For this reason we know for certain that people will continue to travel, but they will travel differently from the way they did during times of economic buoyancy. In the short to medium term we expect that there will be a trend of consumers spending less on travel. Furthermore, demand for the luxury-end market is likely to decrease while demand for both low cost or perceived value tourism products and services is likely to grow. From the -3.6% decline recorded in international visitor arrivals for 2008 there is a clear indication that tourists have scaled down in terms of leisure travel and are looking for value for money deals. Defending our market-share has now become the main challenge. In the coming months there will be need to add value and differentiate the services and products offered in the sector. It is expected that there will be a likely growth in domestic travel and short-haul international travel as consumers will opt for closer to home holiday destinations.

These figures highlight the importance of having a broad balanced portfolio of international markets and more focus on the domestic markets to ensure that Swaziland can weather such challenges. Currently, minimal tourism marketing is directed towards the local market, and yet studies have demonstrated that the strongest and most sustainable market for a destination is its local consumers. This is mostly attributed to its immunity to external factors that affect travel these including currency fluctuations, increasing of fuel prices and contentment of the country (destination). Of interest is that in

the last two years Swaziland outbound travel growth has exceeded international visitor arrival figures, with 4.2 percent outbound growth recorded in 2008. According to the South African Highlights of Tourism's Performance in 2008, a total of 1,088,033 Swazis visited South Africa in that year. Furthermore, Swaziland has for the past four years been listed within the top five drivers of tourism visitor arrivals in South Africa, with more than 45 percent being leisure visitors.

3.2 Tourism Highlights

Table 1: International Visitor Arrivals/ Same Day / In-transit/ Overnight/ Average nights, 2005-2008

Years	<u>Intl. Visitor Arrivals</u>		<u>Same Day</u>		Overnight	<u>Av. Stay</u> (nights)
	Number	Change (%)	Visitors	In-Transit		
2005	1,182,141	n/a	128,853	209,239	836,956	1.94
2006	1,199,858	+1.50	172,780	153,581	873,497	2.20
2007	1,230,092	+2.52	205,425	154,992	869,675	2.24
2008	1,186,000	-3.58	170,784	260,920	754,296	2.50

Source: Entry/ Exit Cards-Department of Immigration, Exit Survey-STA

Table 2: Accommodation usage (number of guests/ average length of stay/ occupancy rate/ total receipts), 2005-2008

Years	<u>Overnight Guests</u>		<u>Av. Stay</u> (nights)	<u>Room</u>	
	Number	Change (%)		Occupancy	Total Receipts
2005	351,041	-0.7	1.08	46.71	E132,735,760
2006	369,809	+5.3	0.97	49.84	E119,906,632
2007	384,782	+3.9	0.77	43.58	E 91,933,553
2008	416,358	+8.2	1.23	47.76	E103,614,596

Source: Monthly Accommodation Survey-Central Statistical Office

Table 3: Swaziland Outbound Travel, 2005-2008

Years	<u>Visitors to</u>		<u>Overall</u>	<u>Spend (Holiday)</u>	
	Number	Change (%)		Per Capita	
2005	1,081,930	n/a	909,966	R3,188m	R5,150
2006	1,072,028	-0.9	991,418	R4,129m	R5,100
2007	1,130,048	+5.4	1,039,233	R4,129m	R2,600
2008	1,177,471	+4.2	1,088,033	n/a	n/a

Source: Entry/ Exit Cards-Department of Immigration, Tourism Departure Surveys-South African Tourism

Chapter 4 International Visitor Arrivals to Swaziland

RSA and Mozambique maintained their leading position as the top two drivers of visitor volumes with 781,173 and 209,139 visitor arrivals, respectively. Despite the high volumes, performance from the two markets was dampening with Mozambique registering a decline of -7.8 percent when compared to 2007. The United Kingdom ranked third with 21,581 while Germany (19,111) and France (17,554) took the fourth and fifth spots.

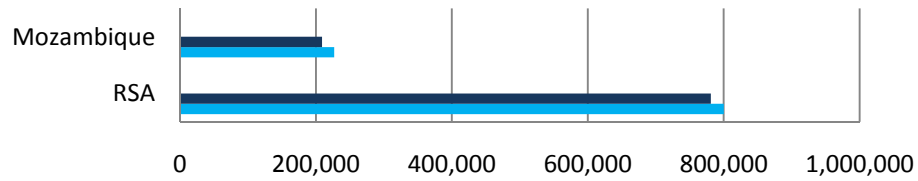
Arrivals from Europe accounted for 9.0 percent of total visitors. From the beginning of the year arrivals from the Euro zone slumped in visitor volumes and recorded an overall decline of -9.1 percent. Generally, global outbound leading markets tumbled reflecting the impact of their economies turmoil as a result of the worsening financial crisis, with the exception of France and Portugal. Mostly affected markets included Germany, Netherlands, Italy and Switzerland. On a optimistic note, in other world regions markets such as Brazil and China (including Hong Kong) displayed a character of resilience recording impeccable growth throughout the year with visitor numbers climbing as high as 69.5% and 7.1%, respectively for the year 2008.

Table 4: Top 15 Source Markets, 2006-2008

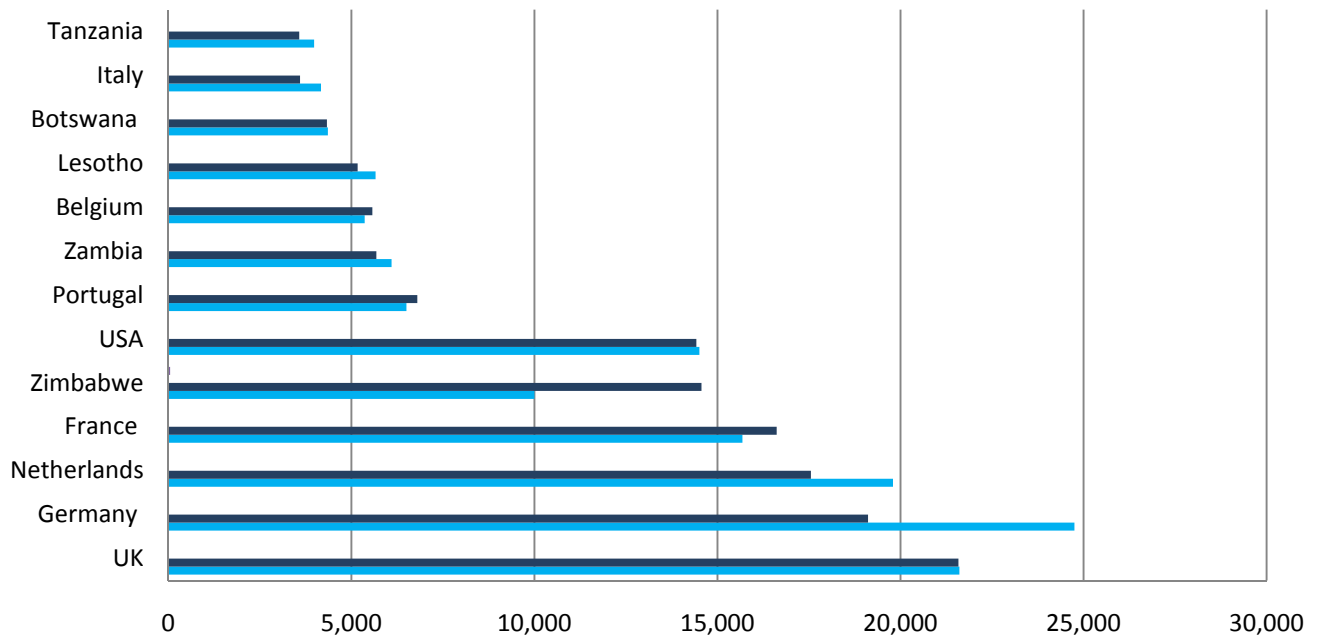
Country	2006	2007	2008
RSA	781,075	800,113	781,173
Mozambique	237,939	226,823	209,139
Germany	23,975	24,749	19,111
UK	20,473	21,608	21,581
Netherlands	16,696	19,795	17,554
France	16,428	15,680	16,619
USA	14,699	14,508	14,421
Zimbabwe	7,769	9,998	14,562
Portugal	5,899	6,504	6,800
Zambia	5,513	6,097	5,682
Switzerland	3,922	5,499	2,518
Lesotho	3,618	5,659	5,168
Belgium	4,896	5,362	5,573
Botswana	3,390	4,357	4,331
Italy	3,891	4,168	3,595

Source: Exit Survey-STA

Chart 1: Top 15 Source Markets, 2007-2008



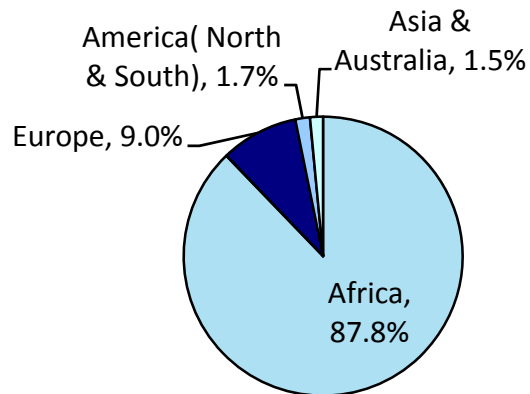
	RSA	Mozambique
Change%	-2	-8
Share %	65.9	17.6
2008	781,173	209,139
2007	800,113	226,823



	UK	Germany	Netherlands	France	Zimbabwe	USA	Portugal	Zambia	Belgium	Lesotho	Botswana	Italy	Tanzania
Change(%)	-0.1	-22.8	-11.3	6.0	45.6	-0.6	4.6	-6.8	3.9	-8.7	-0.6	-13.7	-10.2
Share(%)	1.8	1.6	1.5	1.4	1.2	1.2	0.6	0.5	0.5	0.4	0.4	0.3	0.3
2008	21,581	19,111	17,554	16,619	14,562	14,421	6,800	5,682	5,573	5,168	4,331	3,595	3,575
2007	21,608	24,749	19,795	15,680	9,998	14,508	6,504	6,097	5,362	5,659	4,357	4,168	3,980

Source: Entry/ Exit Cards-Department of Immigration

Chart 2: Visitor Arrivals by World Regions



Source: Entry/ Exit Cards-Department of Immigration

Table 5: Top 5 Growth Source Markets

	2008	2007	% Change
Brazil	1,065	628	+69.5
China (includ. Hong Kong)	2,738	2,557	+7.1
France	16,619	15,680	+6.0
Sweden	2,918	2,759	+5.8
Kenya	2,111	2,006	+5.2

Source: Entry/ Exit Cards-Department of Immigration

Table 6: Top 5 Decline Source Markets

	2008	2007	% Change
Switzerland	2,518	5,499	-54.2
Germany	19,111	24,749	-22.8
Italy	3,595	4,168	-13.7
Netherlands	17,554	19,795	-11.3
Mozambique	209,139	226,823	-7.8

Source: Entry/ Exit Cards-Department of Immigration

Chapter 5 Country Profiles

RSA

Swaziland Arrivals

781,173

↓-2.4%

	Variable	Percentage
Reason for Visit	Holiday	31.0
	Business	15.3
	VFR	17.6
	Other	36.1
Age Group	18-24	9.0
	25-34	28.3
	35-44	35.6
	45-54	19.1
	55-64	5.9
	65+	2.1
Number of Nights Spent	0	43.8
	1	17.1
	2	17.4
	3	9.0
	4+	12.7
Travel Partnership	Alone	25.9
	With partner	25.0
	With friends/ relatives	16.8
	with colleagues	9.9
	With children	1.4
Visit Frequency	With family	20.0
	First	5.7
	Yearly	6.8
	Bi-yearly	9.0
	3-4 times a year	22.7
Type of Accommodation	>=5 times a year	25.8
	Hotel	36.3
	B&B	8.6
	Guest house	6.8
	Private (Friends/ relatives)	34.7
	Self catering	5.1
	Caravan/ camping	2.1
	Backpacker	0.9
	Nature/ Game reserve	4.7
	Other	0.8

Mozambique

Swaziland Arrivals

209,139

↓-7.8%

RSA Arrivals

1,226,989

↑+13.2%

	Variable	Percentage
Reason for Visit	Holiday	33.0
	Business	15.8
	VFR	20.8
	Other	30.3
Age Group	18-24	11.1
	25-34	44.2
	35-44	33.9
	45-54	9.1
	55-64	1.4
	65+	0.3
Number of Nights Spent	0	51.9
	1	16.5
	2	12.7
	3	4.6
	4+	14.3
Travel Partnership	Alone	36.8
	With partner	17.4
	With friends/ relatives	16.4
	with colleagues	5.6
	With children	2.4
	With family	21.3
Visit Frequency	First	58.8
	Yearly	23.5
	Bi-yearly	8.8
	3-4 times a year	0.0
	>=5 times a year	2.9
Type of Accommodation	Hotel	27.6
	B&B	5.2
	Guest house	9.0
	Private (Friends/ relatives)	46.7
	Self catering	4.9
	Caravan/ camping	0.7
	Backpacker	0.1
	Nature/ Game reserve	4.5
	Other	1.2

Germany

Swaziland arrivals

19,111

↓-22.8%

RSA Arrivals

238,306

↓-6.5%

	Variable	Percentage
Reason for Visit	Holiday	85.6
	Business	1.9
	VFR	0.8
	Other	11.6
Age Group	18-24	4.8
	25-34	24.0
	35-44	38.4
	45-54	13.4
	55-64	8.8
	65+	10.6
Number of Nights Spent	0	17.5
	1	54.7
	2	16.2
	3	4.8
	4+	6.7
Travel Partnership	Alone	4.7
	With partner	31.1
	With friends/ relatives	14.7
	with colleagues	3.9
	With children	0.3
Visit Frequency	With family	14.6
	First	90.4
	Yearly	4.1
	Bi-yearly	3.1
	3-4 times a year	0.8
Type of Accommodation	>=5 times a year	0.6
	Hotel	56.7
	B&B	7.6
	Guest house	7.1
	Private (Friends/ relatives)	2.2
	Self catering	1.2
	Caravan/ camping	4.7
	Backpacker	5.2
	Nature/ Game reserve	15.2
	Other	0.0

United Kingdom

Swaziland Arrivals

21,581

↓-0.1%

RSA Arrivals

485,166

↓-2.5%

	Variable	Percentage
Reason for Visit	Holiday	77.7
	Business	5.1
	VFR	3.8
	Other	13.3
Age Group	18-24	9.5
	25-34	26.7
	35-44	27.5
	45-54	11.9
	55-64	12.7
	65+	11.6
Number of Nights Spent	0	16.8
	1	35.2
	2	17.2
	3	9.3
	4+	21.5
Travel Partnership	Alone	12.6
	With partner	28.6
	With friends/ relatives	19.3
	with colleagues	4.9
	With children	0.4
	With family	16.2
Visit Frequency	First	90.8
	Yearly	2.5
	Bi-yearly	4.2
	3-4 times a year	2.5
	>=5 times a year	0.0
Type of Accommodation	Hotel	44.4
	B&B	6.2
	Guest house	6.0
	Private (Friends/ relatives)	11.3
	Self catering	3.5
	Caravan/ camping	4.1
	Backpacker	12.9
	Nature/ Game reserve	11.2
	Other	0.4

Netherlands

Swaziland Arrivals

17,554

↓-11.3%

RSA Arrivals

128,097

↓-0.7%

	Variable	Percentage
Reason for Visit	Holiday	92.0
	Business	0.5
	VFR	1.1
	Other	6.4
Age Group	18-24	11.4
	25-34	24.9
	35-44	33.5
	45-54	11.9
	55-64	8.5
	65+	9.8
Number of Nights Spent	0	9.9
	1	46.5
	2	29.8
	3	7.3
	4+	6.5
Travel Partnership	Alone	2.0
	With partner	42.2
	With friends/ relatives	13.9
	with colleagues	2.8
	With children	0.2
	With family	23.0
Visit Frequency	First	88.9
	Yearly	3.7
	Bi-yearly	2.2
	3-4 times a year	4.4
	>=5 times a year	0.7
Type of Accommodation	Hotel	43.5
	B&B	10.7
	Guest house	7.1
	Private (Friends/ relatives)	1.3
	Self catering	1.7
	Caravan/ camping	7.3
	Backpacker	6.7
	Nature/ Game reserve	21.5
	Other	0.1

France

Swaziland Arrivals

16,619

↑6.0%

RSA Arrivals

127,956

↑11.2%

	Variable	Percentage
Reason for Visit	Holiday	91.7
	Business	2.8
	VFR	1.0
	Other	4.5
Age Group	18-24	3.5
	25-34	25.9
	35-44	32.4
	45-54	14.8
	55-64	11.1
	65+	12.4
Number of Nights Spent	0	6.5
	1	66.7
	2	19.2
	3	3.0
	4+	4.6
Travel Partnership	Alone	3.2
	With partner	37.6
	With friends/ relatives	14.3
	with colleagues	4.6
	With children	1.0
	With family	17.0
Visit Frequency	First	88.7
	Yearly	6.5
	Bi-yearly	1.6
	3-4 times a year	0.8
	>=5 times a year	2.4
Type of Accommodation	Hotel	56.6
	B&B	15.4
	Guest house	8.5
	Private (Friends/ relatives)	1.5
	Self catering	1.5
	Caravan/ camping	5.0
	Backpacker	3.0
	Nature/ Game reserve	8.5
	Other	0.0

USA

Swaziland Arrivals

14,421

↓-0.6%

RSA Arrivals

287,438

↑+3.8%

	Variable	Percentage
Reason for Visit	Holiday	66.0
	Business	10.2
	VFR	8.5
	Other	15.3
Age Group	18-24	19.1
	25-34	30.4
	35-44	25.4
	45-54	10.7
	55-64	9.0
	65+	5.4
Number of Nights Spent	0	16.4
	1	20.9
	2	20.1
	3	9.3
	4+	33.3
Travel Partnership	Alone	15.3
	With partner	25.4
	With friends/ relatives	29.4
	with colleagues	9.0
	With children	0.0
	With family	15.0
Visit Frequency	First	90.5
	Yearly	4.8
	Bi-yearly	2.4
	3-4 times a year	1.6
	>=5 times a year	0.8
Type of Accommodation	Hotel	36.1
	B&B	11.6
	Guest house	9.2
	Private (Friends/ relatives)	15.3
	Self catering	2.7
	Caravan/ camping	2.0
	Backpacker	10.9
	Nature/ Game reserve	11.6
	Other	0.7

Portugal

Swaziland Arrivals

6,800

↑+4.6%

RSA Arrivals

31,762

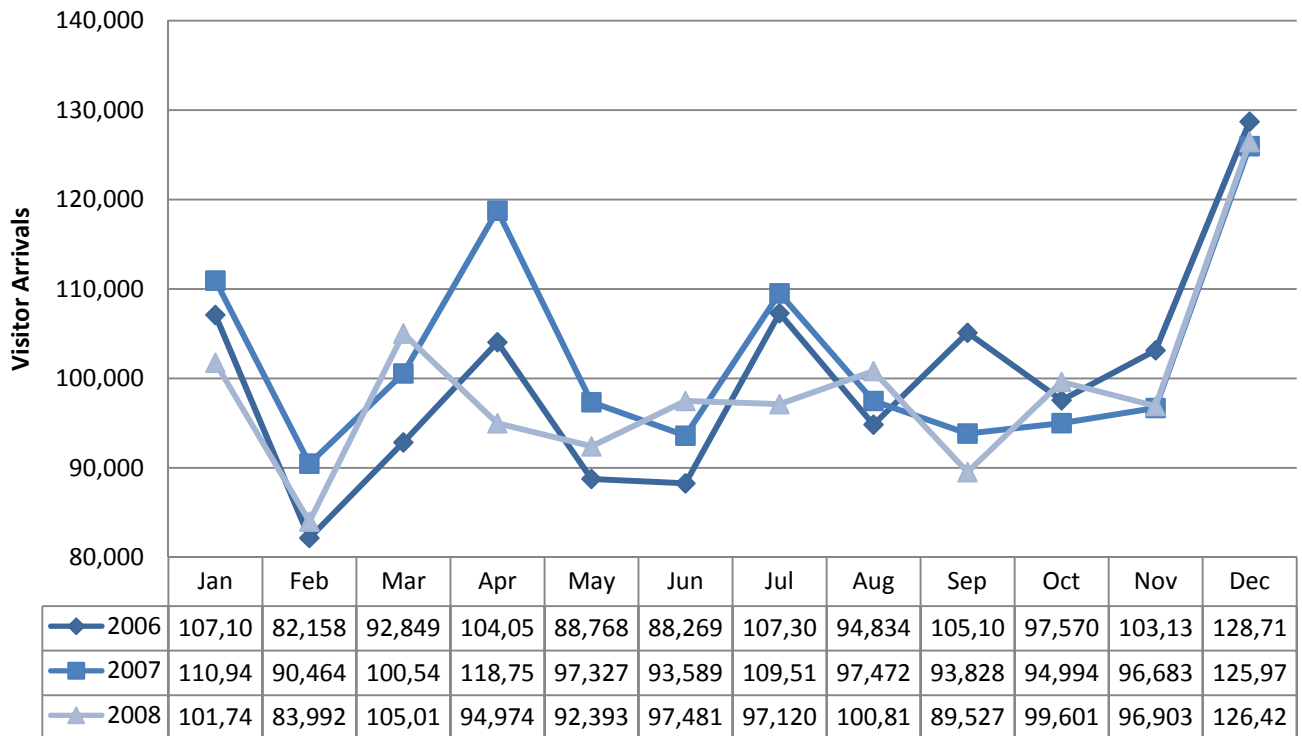
↑+7.1%

	Variable	Percentage
Reason for Visit	Holiday	66.0
	Business	10.0
	VFR	6.0
	Other	18.0
Age Group	18-24	3.6
	25-34	46.4
	35-44	21.4
	45-54	17.9
	55-64	10.7
	65+	0.0
Number of Nights Spent	0	46.0
	1	22.0
	2	18.0
	3	10.0
	4+	4.0
Travel Partnership	Alone	12.0
	With partner	24.0
	With friends/ relatives	22.0
	with colleagues	10.0
	With children	2.0
	With family	24.0
Visit Frequency	First	84.2
	Yearly	15.8
	Bi-yearly	0.0
	3-4 times a year	0.0
	>=5 times a year	0.0
Type of Accommodation	Hotel	46.4
	B&B	10.7
	Guest house	0.0
	Private (Friends/ relatives)	10.7
	Self catering	3.6
	Caravan/ camping	0.0
	Backpacker	3.6
	Nature/ Game reserve	25.0
	Other	0.0

Chapter 6 Seasonality

In 2008, the months of March (Easter holidays), June (RSA school holidays), August and October achieved the highest growth in visitor arrivals. The pattern of arrivals in 2008 closely resembled that of 2006, with the exception of the months September and October. The peaks have over the years remained the same with South Africa's school holiday periods, Easter holidays and Christmas holidays taking the lead. In 2008, troughs were noted in February, May and September.

Chart 4: Visitor Arrivals by Month, 2006-2008

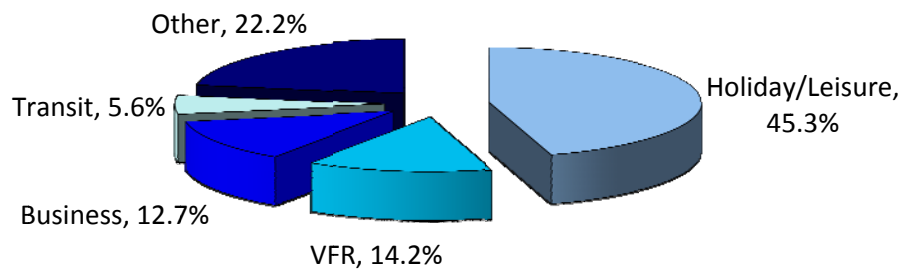


Source: Entry/ Exit Cards-Department of Immigration

Chapter 7 Reason for Visit

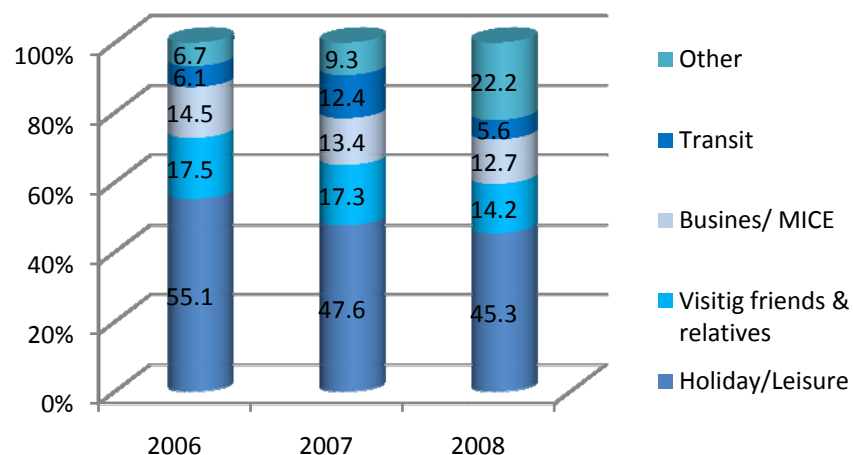
A total of 45.3 percent of visitors came mainly for holiday/ recreational purposes while 12.7 percent were on business or MICE trips. The share of those visiting friends and relatives declined recording 14.2 percent of total international arrivals. In-transit travelers accounted for 5.6 percent, recording a decline of 6.8 percent when compared to 2007. The only segment registering growth was 'other purposes' which includes religious, medical, funerals, etc. A 12.9 percent increase was noted for this segment accounting for 22.2 percent share of visitor arrivals.

Chart 5: Main Reason for Visit, 2008



Source: Exit Survey-STA

Chart 6: Main Reason for Visit, 2006-2008

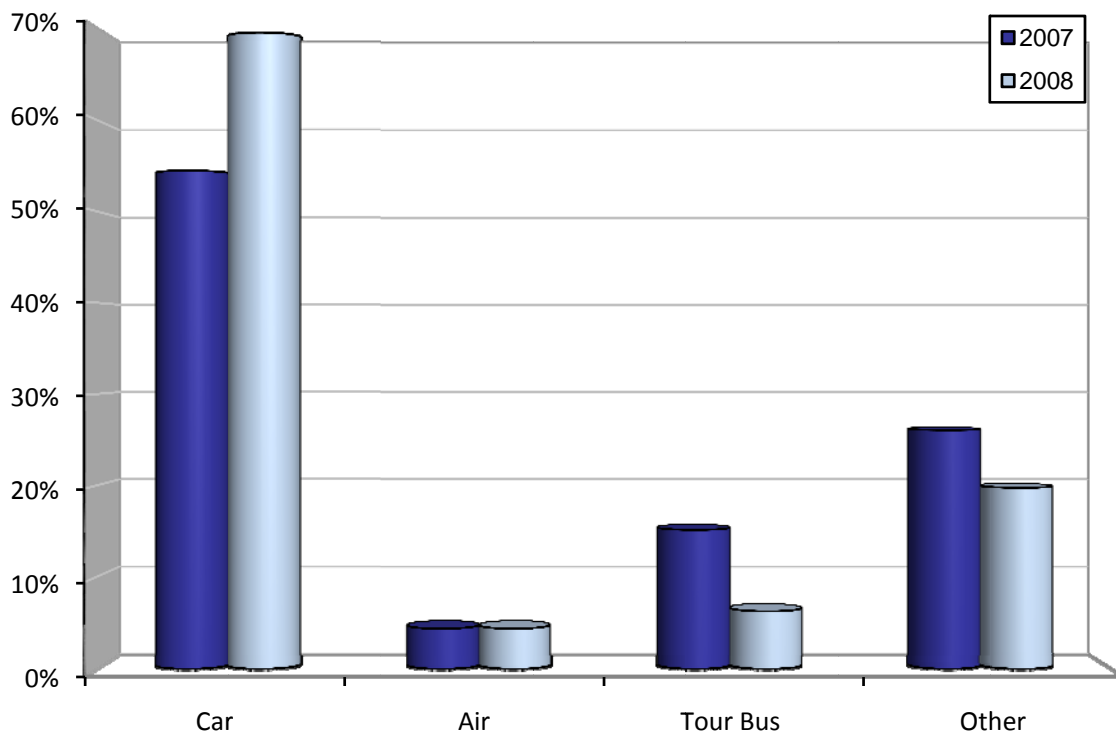


Source: Exit Survey-STA

Chapter 8 Mode of Transport

The total number of visitors to Swaziland travelling by road in 2008 retained the same share as in 2007 recorded 97.7 percent of total arrivals. Although air travel accounted for the same 2.3 percent as in 2007, the actual figure decline from 27,213 to 26,888 visitor arrivals. The share of independent travelers (cars) increased from 54.4 percent in 2007 to 69.4 percent in 2008, while tour bus travelers fell from 15.2 percent in 2007 to 6.3 percent in 2008. The decline is explained by the plummet of European visitors who are typically packaged tour travelers.

Chart 7: Mode of Travel, 2007-2008



Source: Exit Survey-STA

Chapter 9 Length of Stay

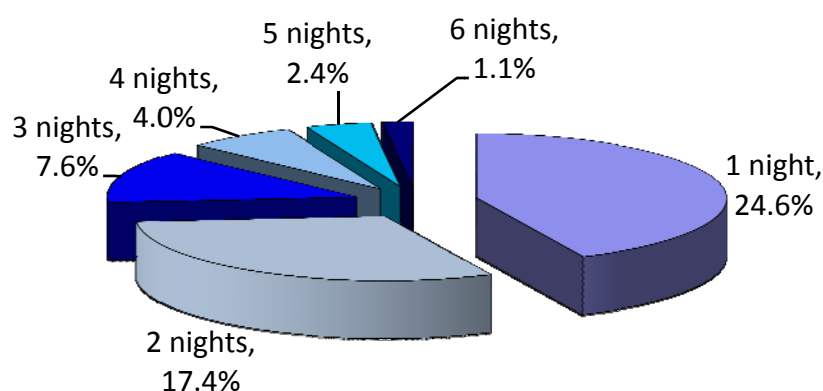
Visitors spent an average of 2.50 nights in the country, representing a marginal increase of 0.26 percent. This figure ranged from 2.15 nights among leisure visitors to 5.38 nights among travelers visiting friends and relatives. Those mainly visiting for business related purposes spent 3.91 nights in the country. American nationals continued to spend the most nights in 2008 with an average of 5 nights while British and Mozambicans also spent more than the country average with 4 and 3 nights, respectively. The average length of stay for guests lodging in formal accommodation registered 1.23 nights, a mere growth of 0.46 percent when compared to 2007.

Table 7: Average Nights Spent by Country of Residence, 2008

Country of residence	Average length of stay (nights)
Belgium	2
France	2
Germany	2
Mozambique	3
Netherlands	2
Portugal	2
RSA	2
UK	4
USA	5

Source: Exit Survey-STA

Chart 8: Length of Stay in Swaziland, 2008



Source: Exit Survey-STA

Chapter 10 Accommodation Usage

As of December 2008, there were 120 registered lodging facilities providing a daily supply of 2600 rooms. Hotels continued to account for the highest share of overnight guests although the share fell by 1 percent compared to 2007. Performing favorably in 2008 were guest houses and bed & breakfasts with the latter recording the highest growth of 3.9 percent. Self catering and camping & caravan also registered growth of 2.9 percent and 2.3 percent, respectively.

Overall the accommodation sector's performance was outstanding with overnight guests registering an all-time high figure of 416,358 guests. Similarly, total revenue for 2008 reached a high E103,6 million representing an increase of 12.7 percent over 2007. With households prioritizing their disposable income spend, more overnight visitors opted for affordably priced lodging facilities (guest houses, bed & breakfasts). This resulted in the revenue per person per night falling to E261.18 in 2008 from E312.08 in 2007. During the same period the average room occupancy went up by 4.18 percent to reach 47.76 percent while the average length of stay recorded a marginal increase of 0.46 percent from 0.76 nights in 2007 to 1.22 nights in 2008.

Chart 9: Overnight Guests/ Average Room Occupancy Rate, 2006-2008

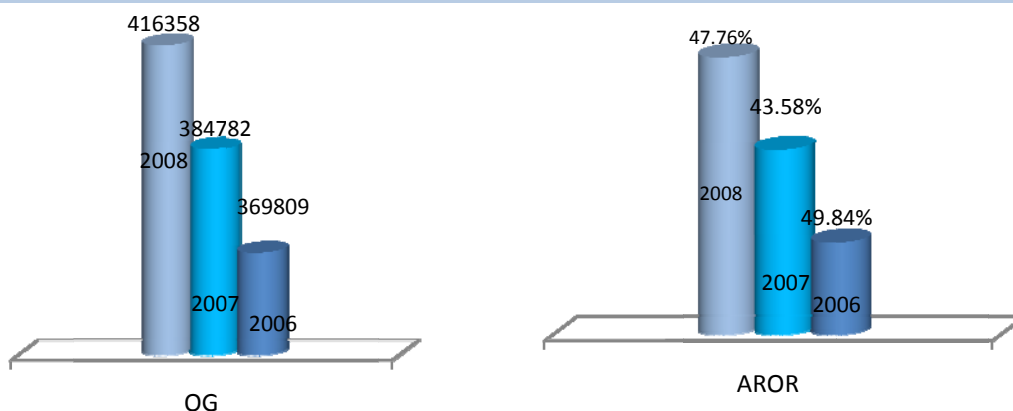
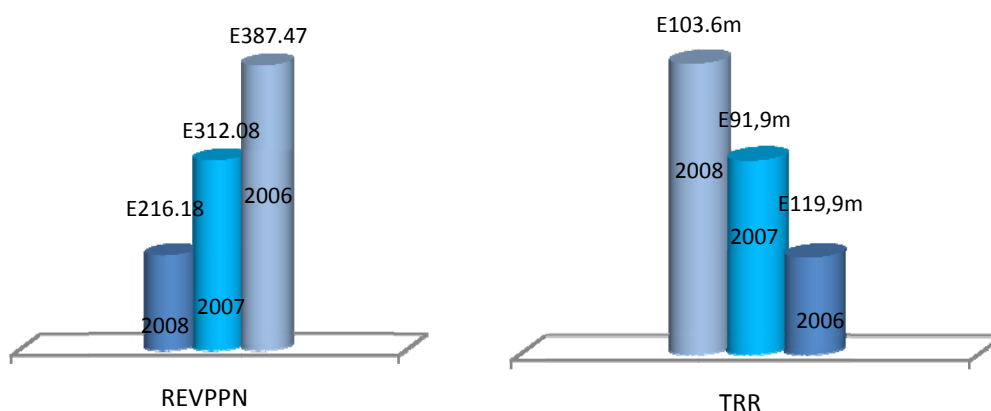
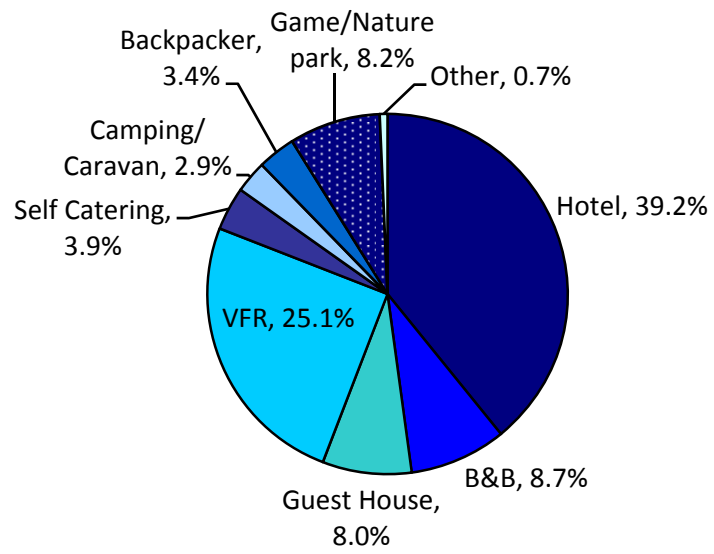


Chart 10: Revenue Per Person Per Night/ Total Room Revenue, 2006-2008



Source: Exit Survey-STA

Chart 11: Accommodation Usage By Type, 2008

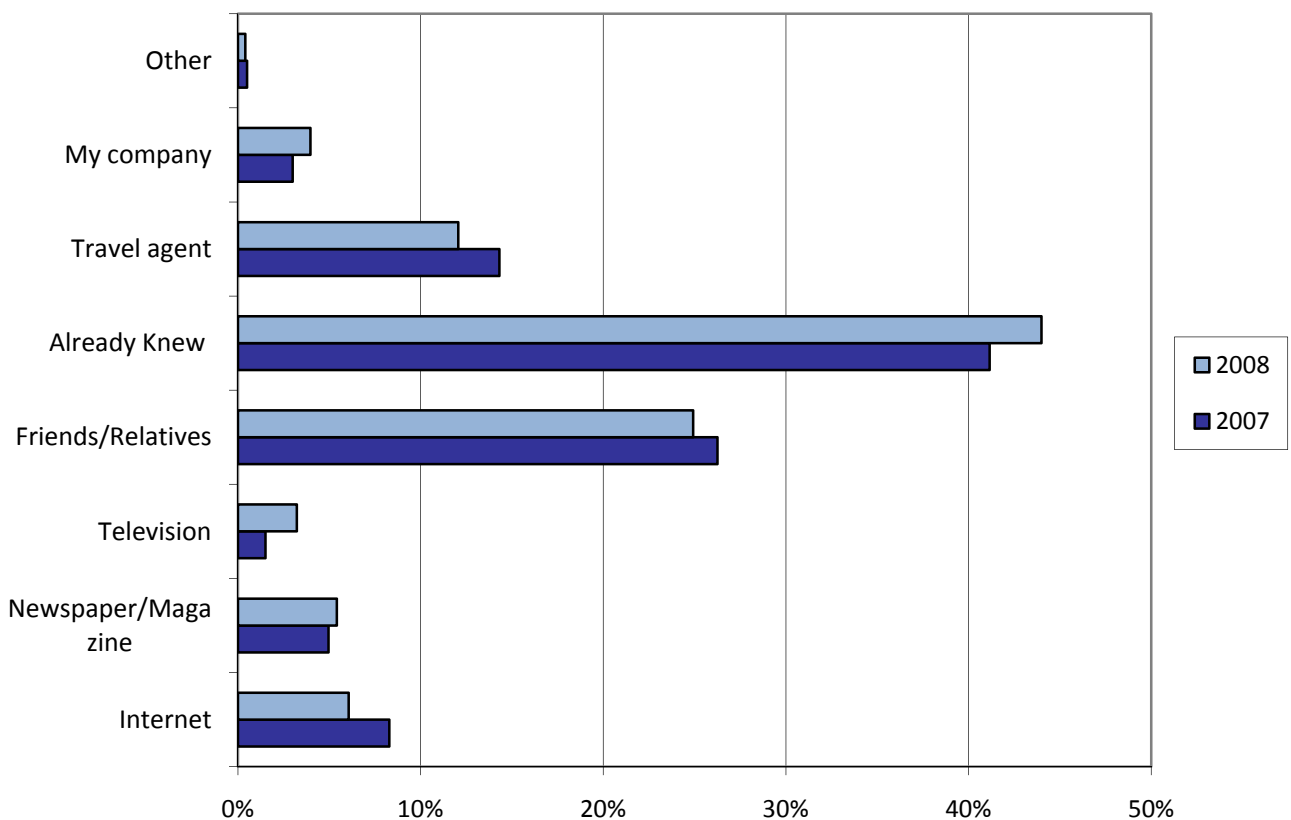


Source: Exit Survey-STA

Chapter 11 Source of Information

During the year, the most common source of information on Swaziland was friends and relatives who had previously visited Swaziland (24.9 percent). The share of visitors using the internet to obtain information on Swaziland dropped slightly by 2 percent to record 6.1 percent, while both television and newspaper/ magazines improved to account for 3.2 percent (+1.7 percent growth) and 5.4 percent (+0.4 percent growth), respectively. The use of travel agents/ tour operators fell from 14.3 percent in 2007 to 12.1 percent in 2008, reflecting the financial struggle of households in overseas markets whose primary source of information are travel agents/ tour operators.

Chart 12: Source of Pre-arrival Information, 2007-2008

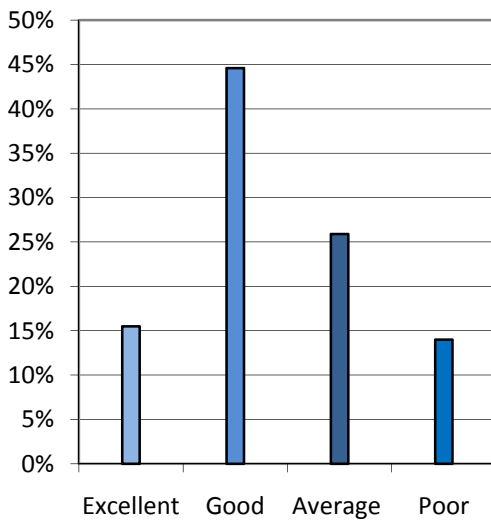


Source: Exit Survey-STA

Chapter 12 Perception of Visitors to Swaziland

Visitors to Swaziland in 2008 were generally satisfied with their overall experience, with 95.5 percent stating they would recommend a visit to the country. Only 0.6 percent was dissatisfied with their overall trip and therefore would not recommend Swaziland. Visitors to Swaziland were mostly excited by the scenery and friendliness of residents. In rating their experience, border control services and accommodation pricing received higher scores while the categories of safety and security and availability of information on travel recorded lesser satisfaction ratings.

Chart 13: Ratings on Accommodation & Pricing



Source: Exit Survey-STA

Chart 14: Ratings on Border Control Service

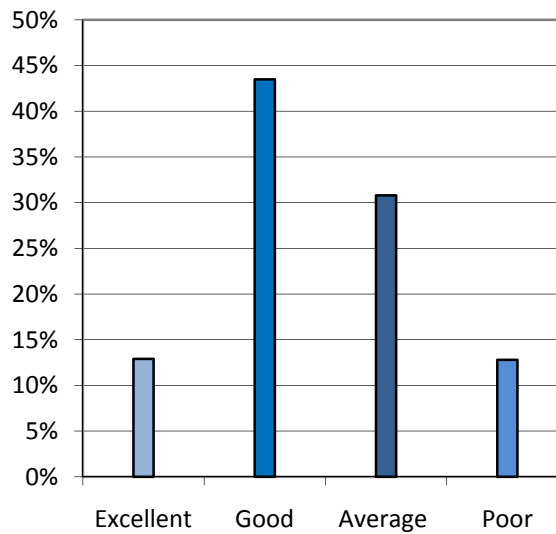
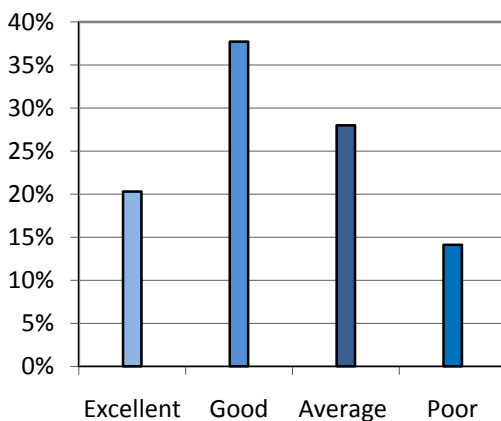
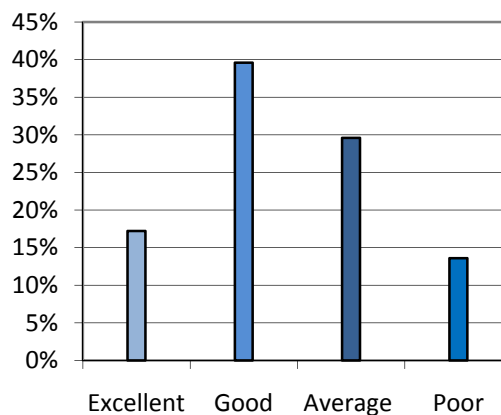


Chart 15: Ratings on Safety & Security



Source: Exit Survey-STA

Chart 16: Ratings on Customer Service (Overall)



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Table 1: International Visitor Arrivals

Table 1: 2008 International visitor arrivals													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
AFRICA	89,688	70,389	92,788	83,346	83,445	89,783	85,293	87,323	78,086	85,783	79,897	115,389	1,041,211
Botswana	257	520	745	280	280	371	262	251	333	236	384	411	4,331
Kenya	168	119	192	168	158	128	185	162	148	169	251	264	2,111
Lesotho	211	160	677	317	257	418	1,285	216	296	662	322	347	5,168
Malawi	162	217	301	231	248	232	205	256	258	255	240	242	2,846
Mozambique	16,130	14,766	17,245	16,725	16,605	16,796	18,185	17,481	14,924	17,800	18,034	24,450	209,139
Nigeria	214	225	254	278	313	248	278	318	349	368	273	305	3,424
RSA	70,513	52,142	70,382	62,454	62,760	68,938	62,419	65,745	58,936	63,606	57,615	85,662	781,173
Tanzania	242	232	298	305	280	302	249	259	348	272	423	364	3,575
Zambia	417	344	485	522	478	447	439	453	442	496	429	730	5,682
Zimbabwe	762	973	1,264	1,318	1,153	1,142	1,124	1,411	1,201	1,321	1,192	1,701	14,562
Other Africa	613	690	945	749	913	762	663	769	850	598	734	914	9,200
NORTH & SOUTH AMERICA	1,153	1,428	1,792	1,695	1,564	1,686	2,151	1,643	1,436	1,809	1,781	1,469	19,607
Brazil	42	101	64	106	78	91	105	132	57	70	74	144	1,065
Canada	199	267	429	309	222	190	309	268	192	312	434	227	3,359
USA	847	1,008	1,229	1,169	1,214	1,350	1,678	1,176	1,126	1,345	1,214	1,066	14,421
Other America	66	52	70	110	49	54	59	68	61	82	60	31	762
ASIA & AUSTRALIA	1,586	1,547	1,511	1,650	1,455	1,396	1,642	1,677	1,462	1,440	1,384	1,425	18,174
Australia	247	209	188	298	284	221	279	363	357	249	251	197	3,142
China	252	239	266	308	197	241	200	202	166	206	207	253	2,738
India	253	225	302	300	250	226	282	344	212	304	284	270	3,252
Israel	95	104	43	61	23	51	50	52	39	103	57	27	705
Pakistan	199	212	204	184	175	204	220	219	197	215	210	198	2,437
Philippines	89	49	56	59	72	44	60	31	41	31	48	88	669
South Korea	109	131	82	5	5	13	148	104	48	45	36	73	800
Taiwan	110	120	92	121	99	98	146	117	177	107	114	110	1,408
Other Asia	233	258	279	312	350	298	256	246	225	179	176	209	3,022
EUROPE	9,323	10,628	8,926	8,283	5,929	4,616	8,034	10,174	8,543	10,569	13,841	8,143	107,008
Belgium	234	454	472	378	239	93	630	450	445	757	1,053	367	5,573
France	2,027	2,217	1,080	1,277	973	450	1,097	1,809	1,067	1,145	2,435	1,043	16,619
Germany	1,436	2,026	1,758	1,963	947	569	928	1,259	1,897	2,055	2,889	1,385	19,111
Italy	252	224	253	174	174	404	205	941	229	231	237	272	3,595
Netherlands	1,541	1,404	1,025	842	794	495	1,749	1,588	1,608	2,451	2,626	1,431	17,554
Norway	130	75	180	48	21	36	60	45	27	87	123	61	894
Portugal	578	550	675	636	584	535	551	646	447	476	521	602	6,800
Sweden	401	401	400	115	57	71	69	49	92	303	504	456	2,918
Switzerland	214	194	267	227	145	73	164	144	174	279	464	172	2,518
UK	1,776	2,136	1,947	1,780	1,469	1,389	1,753	2,214	1,846	1,736	1,997	1,539	21,581
Other Europe	732	949	868	844	526	501	828	1,031	712	1,049	991	813	9,844
GRAND TOTAL	101,749	83,992	105,017	94,974	92,393	97,481	97,120	100,817	89,527	99,601	96,903	126,426	1,186,000

Source: Entry/ Exit Cards-Department of Immigration

Table 2: Reason for Visit

Table 2: 2008						
COUNTRY / REASON FOR VISIT						
	Holiday	VFR	Business	Other	Transit	TOTAL
Africa						
Lesotho	45.7%	8.6%	14.3%	22.9%	8.6%	100.0%
Mozambique	33.0%	20.8%	15.8%	12.2%	18.1%	100.0%
RSA	31.0%	17.6%	15.3%	4.9%	31.2%	100.0%
Zimbabwe	31.4%	27.9%	30.2%	4.7%	5.8%	100.0%
America						
Canada	83.2%	2.3%	6.1%	3.1%	5.3%	100.0%
USA	66.0%	8.5%	10.2%	3.4%	11.9%	100.0%
Asia & Australia						
Australia	74.0%	4.0%	7.0%	0.0%	15.0%	100.0%
Europe						
Belgium	91.5%	0.8%	0.8%	0.0%	6.9%	100.0%
France	91.7%	1.0%	2.8%	0.4%	4.1%	100.0%
Germany	85.6%	0.8%	1.9%	0.0%	11.6%	100.0%
Italy	79.3%	3.0%	1.5%	1.5%	14.8%	100.0%
Netherlands	92.0%	1.1%	0.5%	0.1%	6.3%	100.0%
Norway	90.0%	0.0%	0.0%	0.0%	10.0%	100.0%
Portugal	66.0%	6.0%	10.0%	0.0%	18.0%	100.0%
Sweden	86.7%	6.7%	0.0%	0.0%	6.7%	100.0%
Switzerland	87.0%	1.6%	1.6%	0.0%	9.8%	100.0%
UK	77.7%	3.8%	5.1%	1.6%	11.7%	100.0%

Source: Exit Survey-STA

Table 3: Mode of Travel

COUNTRY / MODE OF TRAVEL					
	Car	Air	Tour Bus	Other	TOTAL
Africa					
Lesotho	62.9%	31.4%	2.9%	2.9%	100.0%
Mozambique	59.6%	0.2%	0.4%	39.8%	100.0%
RSA	76.8%	3.2%	1.1%	18.9%	100.0%
Zimbabwe	43.5%	22.4%	1.2%	32.9%	100.0%
America					
Canada	58.1%	6.2%	20.9%	14.7%	100.0%
USA	61.2%	18.1%	7.6%	13.0%	100.0%
Asia & Australia					
Australia	62.0%	7.0%	16.0%	15.0%	100.0%
Europe					
Belgium	76.2%	0.8%	15.4%	7.7%	100.0%
France	67.2%	2.4%	24.9%	5.5%	100.0%
Germany	60.1%	2.1%	31.9%	6.0%	100.0%
Italy	88.1%	4.4%	2.2%	5.2%	100.0%
Netherlands	75.2%	0.5%	18.4%	5.9%	100.0%
Norway	55.0%	10.0%	15.0%	20.0%	100.0%
Portugal	84.0%	4.0%	6.0%	6.0%	100.0%
Sweden	56.7%	1.7%	28.3%	13.3%	100.0%
Switzerland	80.3%	3.3%	9.8%	6.6%	100.0%
UK	58.3%	7.7%	22.6%	11.5%	100.0%

Source: Exit Survey-STA

Table 4: Accommodation Usage

Table 4: 2008										
COUNTRY / ACCOMMODATION USAGE										
	Hotel	B&B	Guest House	VFR	Self Catering	Camping/ Caravan	Backpacker	Game/ Nature park	Other	TOTAL
Africa										
Lesotho	19.4%	9.7%	29.0%	16.1%	9.7%	6.5%	3.2%	3.2%	3.2%	100.0%
Mozambique	27.6%	5.2%	9.0%	46.7%	4.9%	0.7%	0.1%	4.5%	1.2%	100.0%
RSA	36.3%	8.6%	6.8%	34.7%	5.1%	2.1%	0.9%	4.7%	0.8%	100.0%
Zimbabwe	20.7%	1.7%	15.5%	48.3%	1.7%	3.4%	1.7%	5.2%	1.7%	100.0%
America										
Canada	49.1%	6.9%	7.8%	6.0%	3.4%	1.7%	12.1%	12.1%	0.9%	100.0%
USA	36.1%	11.6%	9.2%	15.3%	2.7%	2.0%	10.9%	11.6%	0.7%	100.0%
Asia & Australia										
Australia	43.2%	6.2%	2.5%	6.2%	0.0%	1.2%	17.3%	23.5%	0.0%	100.0%
Europe										
Belgium	52.9%	12.6%	7.6%	0.8%	0.8%	4.2%	5.0%	16.0%	0.0%	100.0%
France	56.6%	15.4%	8.5%	1.5%	1.5%	5.0%	3.0%	8.5%	0.0%	100.0%
Germany	56.7%	7.6%	7.1%	2.2%	1.2%	4.7%	5.2%	15.2%	0.0%	100.0%
Italy	45.5%	18.2%	7.3%	2.7%	0.9%	4.5%	1.8%	18.2%	0.9%	100.0%
Netherlands	43.5%	10.7%	7.1%	1.3%	1.7%	7.3%	6.7%	21.5%	0.1%	100.0%
Norway	58.8%	0.0%	17.6%	0.0%	5.9%	0.0%	5.9%	11.8%	0.0%	100.0%
Portugal	46.4%	10.7%	0.0%	10.7%	3.6%	0.0%	3.6%	25.0%	0.0%	100.0%
Sweden	35.8%	5.7%	15.1%	7.5%	0.0%	0.0%	15.1%	20.8%	0.0%	100.0%
Switzerland	48.6%	11.2%	8.4%	2.8%	0.0%	9.3%	6.5%	13.1%	0.0%	100.0%
UK	44.4%	6.2%	6.0%	11.3%	3.5%	4.1%	12.9%	11.2%	0.4%	100.0%

Source: Exit Survey-STA

Table 5: Age Group

Table 5: 2008							
AGE GROUP							
Country	18-24	25-34	35-44	45-54	55-64	65+	TOTAL
Africa							
Lesotho	16.1%	25.0%	41.1%	12.5%	5.4%	0.0%	100.0%
Mozambique	11.1%	44.2%	33.9%	9.1%	1.4%	0.3%	100.0%
RSA	9.0%	28.3%	35.6%	19.1%	5.9%	2.1%	100.0%
Zimbabwe	2.0%	42.0%	38.0%	14.0%	4.0%	0.0%	100.0%
America							
Canada	15.0%	28.3%	23.6%	18.1%	8.7%	6.3%	100.0%
USA	19.1%	30.4%	25.4%	10.7%	9.0%	5.4%	100.0%
Asia & Australia							
Australia	9.7%	40.9%	22.6%	10.8%	7.5%	8.6%	100.0%
Europe							
Belgium	6.6%	25.7%	39.5%	14.5%	7.9%	5.9%	100.0%
France	3.5%	25.9%	32.4%	14.8%	11.1%	12.4%	100.0%
Germany	4.8%	24.0%	38.4%	13.4%	8.8%	10.6%	100.0%
Italy	1.8%	38.2%	35.8%	11.5%	8.5%	4.2%	100.0%
Netherlands	11.4%	24.9%	33.5%	11.9%	8.5%	9.8%	100.0%
Norway	22.6%	29.0%	25.8%	16.1%	3.2%	3.2%	100.0%
Portugal	3.6%	46.4%	21.4%	17.9%	10.7%	0.0%	100.0%
Sweden	3.3%	27.9%	41.0%	11.5%	3.3%	13.1%	100.0%
Switzerland	5.3%	26.5%	42.5%	10.6%	8.0%	7.1%	100.0%
UK	9.5%	26.7%	27.5%	11.9%	12.7%	11.6%	100.0%

Source: Exit Survey-STA

Table 6: Travel Partnership

Table 6: 2008								
COUNTRY / TRAVEL PARTNERSHIP								
	Alone	With spouse/ partner	With friends/ relatives	With colleagues	With children under 18yrs	With family	Packaged tour	Total
Africa								
Lesotho	25.7%	14.3%	22.9%	14.3%	0.0%	22.9%	0.0%	100.0%
Mozambique	36.8%	17.4%	16.4%	5.6%	2.4%	21.3%	0.0%	100.0%
RSA	25.9%	25.0%	16.8%	9.9%	1.4%	20.0%	1.1%	100.0%
Zimbabwe	53.5%	7.0%	15.1%	8.1%	0.0%	15.1%	1.2%	100.0%
America								
Canada	5.4%	26.2%	23.8%	7.7%	0.0%	13.8%	23.1%	100.0%
USA	15.3%	25.4%	29.4%	9.0%	0.0%	15.0%	5.9%	100.0%
Asia & Australia								
Australia	14.0%	20.0%	24.0%	6.0%	0.0%	16.0%	20.0%	100.0%
Europe								
Belgium	5.6%	28.6%	21.4%	1.6%	0.0%	30.2%	12.7%	100.0%
France	3.2%	37.6%	14.3%	4.6%	1.0%	17.0%	22.2%	100.0%
Germany	4.7%	31.1%	14.7%	3.9%	0.3%	14.6%	30.7%	100.0%
Italy	3.7%	48.1%	20.7%	3.7%	0.0%	21.5%	2.2%	100.0%
Netherlands	2.0%	42.2%	13.9%	2.8%	0.2%	23.0%	15.9%	100.0%
Norway	15.8%	15.8%	47.4%	0.0%	0.0%	10.5%	10.5%	100.0%
Portugal	12.0%	24.0%	22.0%	10.0%	2.0%	24.0%	6.0%	100.0%
Sweden	5.0%	25.0%	26.7%	3.3%	0.0%	15.0%	25.0%	100.0%
Switzerland	4.1%	33.3%	23.6%	0.8%	0.0%	26.8%	11.4%	100.0%
UK	12.6%	28.6%	19.3%	4.9%	0.4%	16.2%	18.0%	100.0%

Source: Exit Survey-STA

Table 7: Activities Engaged in

Table 7: 2008											
	COUNTRY / ACTIVITIES										
	Wildlife	Adventure	Hiking	Nightlife	Casino	Cultural	Shopping	Handicraft Shopping	Historical/ Heritage	Other	TOTAL
Africa											
Lesotho	16.4%	6.0%	3.0%	6.0%	1.5%	20.9%	25.4%	13.4%	3.0%	4.5%	100.0%
Mozambique	8.6%	4.4%	2.9%	5.6%	5.2%	4.0%	57.7%	5.5%	2.2%	4.0%	100.0%
RSA	10.6%	7.6%	4.5%	5.5%	11.3%	8.9%	30.8%	11.2%	3.2%	6.5%	100.0%
Zimbabwe	11.2%	7.5%	2.8%	2.8%	2.8%	16.8%	44.9%	4.7%	4.7%	1.9%	100.0%
America											
Canada	12.7%	6.7%	9.7%	3.9%	2.4%	14.5%	23.6%	20.6%	5.5%	0.3%	100.0%
USA	19.5%	7.8%	8.8%	3.0%	5.1%	13.7%	20.2%	14.8%	5.9%	1.2%	100.0%
Asia & Australia											
Australia	19.3%	6.2%	9.1%	1.2%	2.9%	12.3%	23.0%	19.3%	6.2%	0.4%	100.0%
Europe											
Belgium	21.1%	6.6%	12.8%	2.1%	1.7%	15.3%	17.4%	17.8%	5.4%	0.0%	100.0%
France	18.8%	7.0%	4.7%	1.9%	2.8%	15.5%	22.7%	21.3%	4.7%	0.5%	100.0%
Germany	18.7%	6.5%	7.6%	1.3%	2.6%	14.2%	23.4%	21.2%	4.3%	0.2%	100.0%
Italy	20.2%	7.8%	8.2%	1.4%	1.4%	15.2%	23.4%	17.4%	4.6%	0.4%	100.0%
Netherlands	21.7%	6.0%	10.5%	1.8%	2.5%	15.4%	18.9%	18.6%	4.6%	0.0%	100.0%
Norway	14.9%	8.5%	8.5%	0.0%	2.1%	14.9%	27.7%	21.3%	2.1%	0.0%	100.0%
Portugal	19.8%	11.9%	4.0%	4.0%	5.0%	11.9%	22.8%	13.9%	5.9%	1.0%	100.0%
Sweden	14.4%	7.6%	6.8%	1.5%	0.8%	17.4%	21.2%	23.5%	6.1%	0.8%	100.0%
Switzerland	24.3%	6.6%	11.1%	2.2%	3.1%	9.7%	21.7%	16.8%	3.5%	0.9%	100.0%
UK	17.6%	7.1%	8.7%	2.4%	3.4%	14.5%	23.0%	17.6%	5.1%	0.6%	100.0%

Source: Exit Survey-STA

Table 8: Visit Frequency

Table 8: 2008								
	COUNTRY/ VISIT FREQUENCY					Weekly	Monthly	TOTAL
	First visit	Once a year	Twice a year	3-4 times a year	Frequently (≥5 times a year)			
Africa								
Lesotho	54.7%	20.6%	11.4%	6.6%	4.7%	0.6%	1.3%	100.0%
Mozambique	58.8%	23.5%	8.8%	0.0%	2.9%	0.0%	5.9%	100.0%
RSA	5.7%	6.8%	9.0%	22.7%	25.8%	9.3%	20.8%	100.0%
Zimbabwe	16.5%	17.6%	15.0%	17.8%	16.5%	4.5%	12.0%	100.0%
America								
Canada	85.4%	2.4%	4.9%	2.4%	2.4%	2.4%	0.0%	100.0%
USA	90.5%	4.8%	2.4%	1.6%	0.8%	0.0%	0.0%	100.0%
Asia & Australia								
Australia	64.6%	6.2%	7.7%	13.8%	3.1%	0.0%	4.6%	100.0%
Europe								
Belgium	86.8%	6.6%	1.9%	2.7%	0.4%	0.0%	1.6%	100.0%
France	88.7%	6.5%	1.6%	0.8%	2.4%	0.0%	0.0%	100.0%
Germany	90.4%	4.1%	3.1%	0.8%	0.6%	0.4%	0.6%	100.0%
Italy	90.4%	5.1%	2.5%	1.4%	0.1%	0.1%	0.3%	100.0%
Netherlands	88.9%	3.7%	2.2%	4.4%	0.7%	0.0%	0.0%	100.0%
Norway	91.7%	3.7%	2.3%	1.7%	0.2%	0.0%	0.4%	100.0%
Portugal	84.2%	15.8%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Sweden	58.3%	8.3%	12.5%	10.4%	2.1%	2.1%	6.3%	100.0%
Switzerland	91.7%	3.3%	5.0%	0.0%	0.0%	0.0%	0.0%	100.0%
UK	90.8%	2.5%	4.2%	2.5%	0.0%	0.0%	0.0%	100.0%

Source: Exit Survey-STA

Table 9: Source of Information

Table 9: 2008									
COUNTRY/ SOURCE OF AWARENESS									
	Internet	Newspaper/ Magazine	Television	Friends/Relatives	Already knew	Travel agent	My company	Other means	Total
Africa									
Lesotho	2.9%	5.7%	0.0%	42.9%	45.7%	0.0%	2.9%	0.0%	100.0%
Mozambique	2.1%	2.0%	2.6%	31.1%	59.1%	0.8%	2.1%	0.1%	100.0%
RSA	1.9%	4.5%	3.0%	24.6%	58.4%	2.1%	5.3%	0.1%	100.0%
Zimbabwe	3.4%	4.6%	5.7%	36.8%	46.0%	2.3%	1.1%	0.0%	100.0%
America									
Canada	19.2%	7.9%	4.6%	24.5%	8.6%	31.1%	2.0%	2.0%	100.0%
USA	14.1%	7.2%	4.6%	39.0%	12.3%	15.6%	6.2%	1.0%	100.0%
Asia & Australia									
Australia	17.6%	5.9%	5.0%	26.9%	12.6%	29.4%	1.7%	0.8%	100.0%
Europe									
Belgium	10.8%	16.5%	3.6%	15.1%	7.2%	44.6%	0.0%	2.2%	100.0%
France	14.1%	8.8%	3.3%	14.7%	5.2%	50.2%	1.9%	1.9%	100.0%
Germany	15.2%	10.4%	3.6%	14.4%	7.3%	47.1%	1.9%	0.0%	100.0%
Italy	16.6%	8.6%	4.0%	21.9%	4.0%	41.7%	2.0%	1.3%	100.0%
Netherlands	19.6%	10.0%	4.4%	17.9%	7.6%	38.6%	1.0%	0.8%	100.0%
Norway	20.0%	10.0%	0.0%	25.0%	10.0%	30.0%	5.0%	0.0%	100.0%
Portugal	18.5%	1.9%	3.7%	31.5%	25.9%	16.7%	1.9%	0.0%	100.0%
Sweden	12.9%	8.6%	2.9%	21.4%	12.9%	41.4%	0.0%	0.0%	100.0%
Switzerland	11.7%	7.5%	1.7%	20.0%	5.8%	50.8%	2.5%	0.0%	100.0%
UK	13.1%	7.8%	3.5%	25.9%	16.2%	30.5%	1.7%	1.3%	100.0%

Source: Exit Survey-STA

Table 10: Day Visitor Arrivals

Table 9: 2008
Day Visitor Arrivals

Country of Residence	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Swaziland	3305	1220	2967	5433	2910	4617	5562	11183	5814	9274	2769	6385	61,439
RSA	983	387	757	794	913	516	503	623	612	532	544	1965	9,129
Mozambique	114	92	87	183	120	161	153	173	140	107	89	160	1,579
Bots	8	18	4	6	9	0	3	7	18	10	26	25	134
Lesotho	36	0	7	1	225	12	220	124	80	306	156	115	1,282
Other Africa	35	51	105	196	56	53	109	121	93	102	120	60	1,101
Germany	157	234	157	82	58	80	130	178	188	278	195	124	1,861
Netherlands	159	129	108	121	116	68	379	246	153	288	216	274	2,257
UK	99	93	98	111	59	72	185	237	138	153	176	90	1,511
France	141	165	188	115	89	29	141	270	78	122	402	144	1,884
Portugal	1	10	2	23	5	6	11	5	12	17	7	5	104
Switzerland	6	7	7	8	12	6	19	29	22	17	57	21	211
Other Europe	319	242	471	139	191	168	289	676	167	309	275	179	3,425
USA	76	124	113	155	207	166	180	198	86	96	73	84	1,558
Canada	11	52	31	21	48	28	51	52	17	39	40	37	427
Other America	20	37	3	156	28	12	7	9	29	30	26	11	368
China	3	16	1	0	5	2	0	3	3	6	5	4	48
India	2	0	10	0	0	0	0	0	0	0	5	8	25
Taiwan	9	6	5	0	0	0	15	0	3	0	6	4	48
Other Asia	17	16	9	48	12	15	29	47	16	32	45	32	318
Australia	11	22	10	41	20	37	59	14	27	9	15	27	292
New Zealand	1	0	0	3	0	4	7	21	2	5	9	1	53
Other Australasia	0	0	0	0	0	0	0	0	0	4	16	6	26
	5,513	2,921	5,140	7,636	5,083	6,052	8,052	14,216	7,698	11,736	5,272	9,761	89,080
Distance by Swazis													
Less than 10km	522	268	172	405	602	234	755	475	350	897	665	887	6,233
10- 30 km	1075	450	1573	1853	1316	1615	1783	2109	688	3990	1080	1785	19,317
30-50 km	719	162	573	706	241	1251	861	1449	752	998	358	1385	9,455
50-70km	380	92	122	826	378	458	409	1731	1657	918	336	639	7,944
70-90km	343	83	276	177	157	440	380	1610	1239	504	195	610	6,014
Over 90km	266	165	251	1467	216	619	1374	3809	1128	1967	135	1079	12,476
	3,305	1,220	2,967	5,433	2,910	4,617	5,562	11,183	5,814	9,274	2,769	6,385	61,439

Reason for visit													
Recreation	3576	2304	3449	3440	2521	1849	3188	3097	2419	2344	2359	6867	37,412
Educational	1580	247	1078	3297	2173	3823	4555	10234	4799	9098	1954	1351	44,189
Research	24	92	111	114	79	114	69	403	251	34	277	367	1,935
Other	333	278	503	785	311	266	240	481	229	260	682	1176	5,545
	5,513	2,921	5,140	7,636	5,083	6,052	8,052	14,216	7,698	11,736	5,272	9,761	89,080
Mode of travel													
Personal car	3532	2326	3385	3079	2292	2007	2831	3621	2477	2084	2477	6870	36,981
Tour bus	1516	271	920	2702	1880	2630	3463	6053	2427	3403	996	1779	28,038
School bus	323	188	658	1742	797	1349	1333	4238	2506	5916	1455	547	21,052
Other	142	137	178	113	114	66	425	304	288	333	344	565	3,008
	5,513	2,921	5,140	7,636	5,083	6,052	8,052	14,216	7,698	11,736	5,272	9,761	89,080
Age group													
Below 18yrs	1291	575	1691	4194	1837	1815	3440	9404	3450	7657	1635	2813	39,800
18-24	1397	240	763	970	987	2733	2419	1028	1930	1727	458	1621	16,273
25-34	983	701	1059	854	654	555	871	1525	888	781	1117	2137	12,125
35-44	928	607	832	691	805	481	613	1096	665	787	854	1433	9,793
45-54	467	429	454	529	422	251	481	746	429	431	644	999	6,280
55-64	336	246	267	267	294	149	171	293	243	227	372	536	3,401
65+yrs	110	122	74	131	85	69	58	124	93	127	192	222	1,407
	5,513	2,921	5,140	7,636	5,083	6,052	8,052	14,216	7,698	11,736	5,272	9,761	89,080
Gender													
Female	2770	1412	2464	3932	2548	3285	4241	7125	4072	6574	2808	5492	46,723
Male	2743	1509	2676	3704	2535	2767	3811	7091	3626	5162	2464	4269	42,357
	5,513	2,921	5,140	7,636	5,083	6,052	8,052	14,216	7,698	11,736	5,272	9,761	89,080
Travel partnership													
Alone	95	133	122	128	159	122	121	145	92	74	89	299	1,580
With Spouse	934	723	721	567	676	507	461	1101	913	609	768	1236	9,216
With Colleagues	802	796	1164	1123	1637	490	447	1095	426	1280	806	2329	12,394
With Friends & relatives	1383	752	1336	969	390	651	1649	1298	807	932	707	2454	13,328
With Children	901	394	886	3783	739	943	528	381	665	323	382	2207	12,132
Packaged Tour	136	56	128	95	27	43	100	248	54	199	813	323	2,221
School tour	1262	64	759	941	1455	3296	4634	9701	4497	8052	1471	572	36,703
Other	0	3	24	30	0	0	113	248	244	266	236	341	1,505
	5,513	2,921	5,140	7,636	5,083	6,052	8,052	14,216	7,698	11,736	5,272	9,761	89,080
REVENUE (E)	224,286.00	177,759.50	257,589.00	239,637.00	230,553.00	157,256.50	357,527.00	513,676.00	190,185.00	336,824.00	378,891.00	379,272.50	3,443,456.50

Source: Day Visitor Survey-STA

Table 11: Accommodation Data

2008 ACCOMMODATION STATISTICS													
Hotel Location	January	February	March	April	May	June	July	August	September	October	November	December	Total
<i>Mbabane</i>	2,727	2,483	2,713	2,571	2,661	2,603	2,650	2,648	2,601	2,632	2,570	2,653	31,512
<i>Ezulwini</i>	19,282	18,913	20,403	19,320	19,902	19,740	20,398	20,398	19,740	18,631	18,030	18,631	233,388
<i>Manzini</i>	7,471	7,801	8,339	8,070	8,773	8,490	8,773	8,773	8,490	8,773	8,490	8,773	101,016
<i>Rest of SD</i>	21,514	20,290	21,330	20,592	21,394	20,714	16,808	16,809	16,277	16,811	16,279	16,813	225,631
<i>Grand Total</i>	50,994	49,487	52,785	50,553	52,730	51,547	48,629	48,628	47,108	46,847	45,369	46,870	591,547
ROOMS AVAILABLE													
<i>Mbabane</i>	1,368	1,461	1,743	1,577	1,761	1,768	1,847	1,849	1,771	1,694	1,907	1,815	20,561
<i>Ezulwini</i>	7,876	10,390	9,815	10,616	9,720	10,386	11,572	12,799	12,314	12,270	15,070	12,316	135,144
<i>Manzini</i>	2,247	4,051	5,194	5,248	4,221	5,920	4,721	5,053	5,889	3,931	2,700	4,169	53,344
<i>Rest of SD</i>	5,239	5,503	7,136	5,609	5,755	4,312	5,471	7,061	6,085	7,284	6,351	6,650	72,456
<i>Grand Total</i>	16,730	21,405	23,888	23,050	21,457	22,386	23,611	26,762	26,059	25,179	26,028	24,950	281,505
TOTAL BILL													
<i>Mbabane</i>	631,744	720,662	779,836	799,075	647,614	749,372	688,330	709,128	674,507	665,673	852,862	692,072	8,610,875
<i>Ezulwini</i>	3,220,320	3,923,525	4,649,783	3,886,929	4,438,974	3,958,590	4,578,338	4,752,136	5,226,977	7,478,615	6,456,548	6,385,727	58,956,462
<i>Manzini</i>	506,311	587,260	937,587	659,605	565,891	819,190	1,019,630	1,795,532	1,808,141	634,527	370,306	668,879	10,372,859
<i>Rest of SD</i>	1,743,765	1,892,154	2,276,254	2,033,246	1,743,496	2,412,518	2,119,489	1,981,881	1,866,150	1,790,143	3,064,755	2,750,549	25,674,400
<i>Grand Total</i>	6,102,140	7,123,601	8,643,460	7,378,855	7,395,975	7,939,670	8,405,787	9,238,677	9,575,775	10,568,958	10,744,471	10,497,227	103,614,596
NUMBER OF BEDS AVAILABLE													
<i>Mbabane</i>	4,724	4,919	4,955	5,562	4,983	5,120	3,662	3,941	18,078	2,502	2,460	2,502	63,408
<i>Ezulwini</i>	26,536	24,626	26,541	25,680	26,536	25,680	26,784	26,784	35,920	26,784	25,920	26,784	324,575
<i>Manzini</i>	10,788	10,092	10,788	10,680	11,470	11,100	9,951	9,951	9,630	9,951	9,630	9,951	123,982
<i>Rest of SD</i>	35,557	35,254	32,284	32,160	34,069	32,970	29,109	29,109	28,186	29,109	28,186	29,212	375,205
<i>Grand Total</i>	77,605	74,891	74,568	74,082	77,058	74,870	69,506	69,785	91,814	68,346	66,196	68,449	887,170

NUMBER OF BED-NIGHTS SOLD													
<i>Mbabane</i>	3,767	3,507	4,217	3,711	3,551	3,840	2,557	3,415	2,616	2,859	2,806	2,968	39,814
<i>Ezulwini</i>	13,540	13,635	14,928	14,840	15,600	16,141	16,281	17,036	19,487	35,037	16,943	16,107	209,575
<i>Manzini</i>	2,227	4,217	5,987	5,328	4,619	3,521	4,409	6,079	6,791	3,336	1,987	3,227	51,728
<i>Rest of Swaziland</i>	5,804	6,857	8,375	7,418	8,207	6,070	7,317	9,210	7,606	8,939	10,084	10,112	95,999
<i>Grand Total</i>	25,338	28,216	33,507	31,297	31,977	29,572	30,564	35,740	36,500	50,171	31,820	32,414	397,116
NUMBER OF DOMESTIC TOURISTS													
<i>Mbabane</i>	120	128	261	148	391	217	331	243	177	1,051	776	636	4,479
<i>Ezulwini</i>	4,440	5,248	5,432	4,834	4,958	4,018	3,804	3,580	2,796	3,368	3,707	2,851	49,036
<i>Manzini</i>	2,281	1,808	2,543	2,465	1,941	1,334	1,319	1,970	2,576	2,736	791	1,822	23,586
<i>Rest of Swaziland</i>	1,437	800	1,209	1,472	1,006	824	1,068	1,475	994	1,523	1,433	2,478	15,719
<i>Grand Total</i>	8,278	7,984	9,445	8,919	8,296	6,393	6,522	7,268	6,543	8,678	6,707	7,787	92,820
NUMBER OF INTERNATIONAL TOURISTS													
<i>Mbabane</i>	1,638	1,955	2,182	1,773	1,890	1,987	2,044	2,406	2,073	2,010	2,244	2,420	24,622
<i>Ezulwini</i>	10,605	11,443	13,802	12,796	13,585	12,518	15,318	16,713	14,082	14,891	19,401	15,560	170,714
<i>Manzini</i>	3,043	2,773	3,147	3,093	3,253	3,225	3,983	8,034	6,631	2,149	1,430	2,145	42,906
<i>Rest of Swaziland</i>	4,347	4,588	5,073	6,374	5,737	7,246	8,052	9,461	8,507	9,004	8,304	8,603	85,296
<i>Grand Total</i>	19,633	20,759	24,204	24,036	24,465	24,976	29,397	36,614	31,293	28,054	31,379	28,728	323,538
TOTAL NUMBER OF TOURISTS													
<i>Mbabane</i>	1,758	2,083	2,443	1,921	2,281	2,204	2,375	2,649	2,250	3,061	3,020	3,056	29,101
<i>Ezulwini</i>	15,045	16,691	19,234	17,630	18,543	16,536	19,122	20,293	16,878	18,259	23,108	18,411	219,750
<i>Manzini</i>	5,324	4,581	5,690	5,558	5,194	4,559	5,302	10,004	9,207	4,885	2,221	3,967	66,492
<i>Rest of Swaziland</i>	5,784	5,388	6,282	7,846	6,743	8,070	9,120	10,936	9,501	10,527	9,737	11,081	101,015
<i>Grand Total</i>	27,911	28,743	33,649	32,955	32,761	31,369	35,919	43,882	37,836	36,732	38,086	36,515	416,358

TOURISM STATISTICS (RATES) - 2007

	1. Expenditure per Person per Night = (Total Bill/ No. of Bed-Nights Sold)			1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
<i>Mbabane</i>	216.277566	=	216.278	185.56	197.81	241.26	256.06
<i>Ezulwini</i>	281.314384	=	281.314	280.11	263.72	275.69	298.45
<i>Manzini</i>	200.526968	=	200.527	163.39	151.82	267.57	195.76
<i>Rest of S.D</i>	268.664465	=	268.664	282.35	285.96	248.38	262.30
<i>Total</i>	261.177492	=	261.177	251.47	244.78	265.05	278.39
	2. Average Length of Stay = (No. of Bed Nights Sold/ No. of Tourists)			1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
<i>Mbabane</i>	1.36813168	=	1	1.99	1.96	1.32	1.29
<i>Ezulwini</i>	0.95369738	=	1	1.17	1.20	1.15	1.37
<i>Manzini</i>	0.77795825	=	1	0.39	0.41	0.59	0.29
<i>Rest of S.D</i>	0.94184144	=	1	0.20	0.22	0.28	0.34
<i>Total</i>	1.226196	=	1	0.38	0.41	0.44	0.56
	3. Bed Occupancy Rates = [(No. of Bed Nights Sold/ No. of Beds Available) x100%]			1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
<i>Mbabane</i>	0.62790184	=	62.79	0.79	0.71	0.33	1.16
<i>Ezulwini</i>	0.64569052	=	64.57	0.54	0.60	0.59	0.86
<i>Manzini</i>	0.41722185	=	41.72	0.39	0.41	0.59	0.29
<i>Rest of S.D</i>	0.25469543	=	25.47	0.20	0.22	0.28	0.34
<i>Total</i>	0.44717585	=	44.72	0.38	0.41	0.44	0.56
	4. Room Occupancy Rates = [(No. of Room Nights Sold/ No. of rooms Available) x100%]			1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
<i>Mbabane</i>	0.60037446	=	60.04	57.71	65.17	69.21	68.35
<i>Ezulwini</i>	0.56526042	=	56.53	47.92	52.10	60.60	71.72
<i>Manzini</i>	0.53797418	=	53.80	48.67	60.75	64.00	41.48
<i>Rest of S.D</i>	0.33401316	=	33.40	28.32	25.00	37.31	40.65
<i>Total</i>	0.47756983	=	47.76	40.47	43.20	53.64	54.76

Source: Monthly Accommodation Survey – Central Statistics Office



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