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Annual Report TOURISM STATISTICS 2010

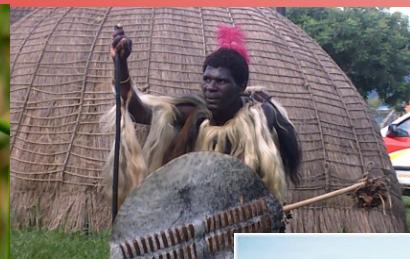


Table of Contents

<i>i. Executive Summary</i>	2
Chapter 1 Introduction	4
Chapter 2 Global Performance 2010	5
2.1 International Tourism 2010	5
2.2 Regional Panorama	5
2.3 Prospects for 2011	6
Chapter 3 Swaziland Overview	7
3.1 Tourism Highlights	7
Chapter 4 International Visitor Arrivals to Swaziland	10
Chapter 5 Country Profiles	13
5.1 RSA	13
5.2 Mozambique	16
5.3 UK	19
5.4 Germany	22
5.5 Netherlands	26
5.6 France	29
5.7 USA	32
Chapter 6 Seasonality	35
Chapter 7 Purpose for Visit	40
Chapter 8 Mode of Transport	42
Chapter 9 Age Group	43
Chapter 10 Length of Stay.....	44
Chapter 11 Accommodation Usage	45
Chapter 12 Travel Partnership.....	47
Chapter 13 Activities Engaged In.....	48
Chapter 14 Channels of Information	49
Chapter 15 Trip Satisfaction of Visitors to Swaziland	50
List of Tables	51

Executive Summary

During the 2010 calendar year international visitors took 1,342,533 trips to Swaziland representing a marginal decline of 0.1 percent from 1,343,950 million recorded in 2009. Over the same period, Swaziland residents took 73,519 daytrips within Swaziland and 1,140,881 external trips.

2010 proved to be a tough year for long-haul arrivals to Swaziland as some overseas markets continued to battle adverse economic conditions. The closure of European airspace for a few days in April and December, 2010 resulted in virtual cancellation of air services from important source markets such as UK, Germany and USA amounting to a significant loss in terms of arrivals and hotel occupancy. In spite of the negative performance from the Euro zone, optimistic results were noted from markets such as South Africa, Zambia, and Portugal. Visitor arrivals from these markets appeared to be relatively favourable demonstrating growth throughout the year.

Although a total of 907,552 international visitors spent at least one night in Swaziland, only about a third (338,033) of this figure were recorded to have used formal accommodation. Overall, overnight guests that utilised formal accommodation in 2010 registered 442,336. International overnight guests contributed 76.4 percent of total overnight visitors while domestic overnight guests accounted for 23.6 percent (104,303) of total overnight guests. The country's average length stay grew to 3.1 nights from 2.5 nights in 2009. However, the average length of stay in formal accommodation remained relatively the same at 1.3 nights while room occupancy rate increased by 2.3 percent to 55.17 percent. Overnight travellers spent E119 million and day travellers to attraction sites spent E4.2 million.

The reasons for day visiting travellers varied considerably amongst both domestic and international within Swaziland. While leisure or recreational excursions contributed significantly to international day-visitors activities (46.9 percent), domestic excursions were mainly for educational purposes accounting for a more prominent share (49.0 percent). Most visitors travelled using personal vehicles (43.5 percent), with tour buses (22.4 percent) and school buses (32.3 percent) also registering significant numbers.

Overall, visitors remained enthusiastic with their experience with 98.9 percent stating they would recommend a visit to Swaziland. The main highlights for these visitors were warm and friendly people (36.4 percent), scenic beauty (28.7 percent), excellent road infrastructure (5.4 percent) and culture and heritage (4.9 percent). In spite of the generally positive responses, ratings on excellence in border controls services was down by -7.3 percent, availability of information declined by 4.0 percent and customer services in accommodation and dining facilities fell by 3.9 percent.

As a final note, care needs to be taken in interpreting these results as the comparative base of last year (2009) was characterized by supernormal growth. The global financial meltdown in 2009 resulted in consumers becoming more vigilant on spend and in particular spend on leisure

consumption. As such, people opted to travel to closer-to-home destinations and this resulted in an unusual travel pattern for global tourism with Swaziland recording exaggerated arrival figures from markets within the region. Hence, a more situated year for comparison of 2010 would be 2008, before the effects of the global crisis were felt. The present case is such that even reasonable performances now may look devastating against the backdrop of 2009.

Chapter 1 Introduction

The International Visitor Survey is an on-going survey conducted monthly since March 2004. The survey is designed to provide a profile of the characteristics, travel behaviour and expenditure of international travellers to Swaziland. A total of 39,000 departing visitors over the age of 18 years were sampled in 2010. Respondents were asked over 25 questions about their visit, including their main reasons for visiting; number of nights in Swaziland; travel arrangements; places visited; information sources about Swaziland prior to leaving their home country; impressions of aspects of Swaziland; income earned and expenditure on the trip; transport and accommodation used, what they did while travelling and how much they spent.

Other data included in the report are on performance measures of the accommodation sector where data on room and bed supply, occupancy, length of stay and receipts are collected through a Monthly Accommodation Survey conducted by the Central Statistics Office. Where comparable data exists, indicators of international and domestic travel have been combined.

This report provides only a summary of information available from the International Visitors Survey. An electronic version of this report and previous annual tourism statistics reports and monthly arrival statistics can be accessed at <http://www.welcometoswaziland.com>. For more information on statistics on tourism in Swaziland, please contact:

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Chapter 2 Global Performance

2.1 International Tourism 2010 – A multi-speed recovery

International tourism recovered strongly in 2010 from the blow it suffered due to the global financial crisis and economic recession. International tourist arrivals were up by almost 7 percent to 935 million, following the exceptional 4 percent decline in 2009. However, recovery came at different speeds and was primarily driven by emerging countries.

Boosted by improved confidence and economic conditions worldwide, international tourism has recovered faster than expected from the impacts of the global financial crisis and economic recession of late 2008 and 2009. Worldwide, the number of international tourist arrivals is estimated to have reached 935 million, up 58 million (+6.7 percent) compared with 2009 (877 million) and 22 million (+2.4 percent) more than during the pre-crisis peak year 2008 (913 million).

The vast majority of destinations worldwide reported positive and often double-digit increases, sufficient to offset recent losses or bring them close to this target. While all regions posted positive growth in international tourist arrivals, emerging economies remain the main drivers of this recovery. This multi-speed recovery – slower in advanced economies, faster in emerging ones – is a reflection of the broader global economic situation and is set to dominate 2011 and the foreseeable future.

2.2 Regional Panorama

- **Asia and the Pacific** (+13 percent), the first region to recover, has been growing strongly with international tourist arrivals at a new historic record of 204 million in 2010. A double-digit growth rate is a common result for destinations in this region, where international arrivals is boosted by a strong development in local economies. With 23 million additional visits the region has secured a share of 22 percent of the international tourism market.
- Rapid growth for the **Middle-East** (+14 percent), but on depressed figures in 2009. Boosted by intraregional travel favored by high oil prices, the region reached 60 million arrivals.
- Growth in the **Americas** (+8 percent) is mostly explained by economic factors, namely the signs of recovery from the US economy and the vitality of Latin countries. The increasing regional integration in Central and South America has also favored recovery.
- **Africa**'s 6 percent growth is an increase on the positive results of 2009. Supported by worldwide exposure created by the FIFA World Football Cup, hosted by South Africa, the region maintained momentum in 2010, achieving a total of 49 million arrivals.
- The effects of the crisis have been slowly fading away in **Europe** (+3 percent), the region hardest hit. But the closure of its airspace in April and uncertainty about the economy have not helped to speed up recovery in the region. Outstanding performances of some large destinations (e.g. Germany +12 percent and Turkey +6 percent) as well as of

emerging ones (as in the Balkans and South Caucasus) contrast with the region's average growth.

2.3 Prospects for 2011

- Growth is set to continue in 2011, yet at a more moderate pace. UNWTO predicts an increase in international tourist arrivals worldwide this year in the range of 4 percent to 5 percent, somewhat above the long-term average of 4 percent.
- Emerging destinations, especially in Asia and the Pacific and the Middle-East, are expected to continue leading the growth, taking advantage of a far from exhausted demand from neighboring countries. In the advanced economies, major challenges to the projected growth are linked to the economic outlook, including high unemployment and weak consumer confidence.
- 2011's prospects expressed by UNWTO's Panel of Experts also remain very optimistic overall (139), with expectations in Asia and the Pacific (151) and in the Americas (143) at the highest. By sector, the Tour Operators and Travel Agencies are the most optimistic about the outlook for 2011 with a rating at 146.
- Tourism's quick recovery in 2010 confirms the sector's resilience in the medium and long term, confirming that it is a key driver of growth and much needed employment in a changing economic setting.
- During the year marked by economic uncertainty, natural disasters and political and social unrest, international travel showed its vulnerability toward shocks in the short term. The implementation of measures to mitigate this impact would reduce the sector's vulnerability.
- Mega-events contributed to offset the negative effects of the economic crisis, and displayed their extraordinary ability to promote and boost arrivals in emerging destinations, such as South Africa (FIFA World Cup), Shanghai (Expo 2010) and India (Commonwealth Games), as well as mature ones like Canada (Winter Olympic Games).

Chapter 3 Swaziland Overview

3.1 Tourism Highlights

Table 1: Visitor Arrivals by Region/ Country of Residence

Thousand

Region/Country	2005	2006	2007	2008	2009	2010
Africa	1,043,248	1,056,388	1,075,005	1,041,210	1,191,258	1,218,053
Botswana	3,497	3,390	4,357	4,331	3,931	4,053
Kenya	1,398	1,668	2,006	2,111	2,343	2,709
Malawi	2,206	2,396	2,996	2,846	3,109	3,017
Mozambique	183,382	237,939	226,823	209,139	266,560	241,334
Nigeria	1,864	2,454	3,238	3,424	3,202	2,744
RSA	826,687	781,075	800,113	781,173	866,584	911,194
Tanzania	2,440	3,023	3,980	3,575	4,802	4,677
Zambia	5,155	5,513	6,097	5,682	6,086	7,128
Zimbabwe	6,523	7,769	9,998	14,562	19,880	24,943
Other Africa	10,096	11,161	15,397	14,368	14,762	16,255
Americas	17,217	18,945	19,184	19,607	20,187	20,498
Brazil	343	470	628	1,065	1,234	1,085
Canada	2,470	3,175	3,393	3,359	3,317	3,192
USA	14,005	14,699	14,508	14,421	14,925	15,141
Other Americas	399	601	655	762	711	1,081
Asia	11,322	11,695	13,943	13,665	16,547	15,654
China	2,381	1,975	2,557	2,738	2,137	1,980
Hong Kong	29	32	24	19	19	26
India	2,396	3,071	3,449	3,252	4,339	3,970
Japan	506	486	680	635	587	524
Korea	809	860	1,226	800	1,133	1,137
Pakistan	1,624	1,842	1,910	2,437	2,929	3,493
Philippines	363	439	712	669	569	497
Sri Lanka	139	174	312	227	234	298
Taiwan	1,660	1,734	1,848	1,408	1,386	1,182
Other Asia	1,399	1,041	1,215	1,449	3,214	2,546
Europe	106,760	108,576	117,168	107,007	111,326	83,941
Belgium	4,539	4,896	5,362	5,573	7,892	3,205
France	16,880	16,428	15,680	16,619	16,638	12,737
Germany	25,395	23,975	24,749	19,111	15,639	11,294
Italy	3,681	3,891	4,168	3,595	3,478	3,104
Netherlands	17,703	16,696	19,795	17,554	19,604	10,788
Norway	1,272	1,508	1,306	894	1,056	891
Portugal	3,762	5,899	6,504	6,800	8,169	8,294
Sweden	2,244	2,692	2,759	2,918	2,894	2,107
Switzerland	3,413	3,922	5,499	2,518	2,561	1,773
United Kingdom	21,283	20,473	21,608	21,581	24,100	21,731
Other Europe	6,588	8,196	9,738	9,844	9,296	8,017
Oceania	2,854	3,300	3,853	3,690	3,493	3,415
Australia	2,333	2,672	3,315	3,142	2,810	2,874
New Zealand	521	628	538	548	683	541
Middle East	756	995	951	850	1,138	972
Kuwait	5	5	2	13	122	63
Iran	42	51	72	57	43	46
Israel	676	766	830	705	877	713
Saudi Arabia	14	9	6	6	18	4
UAE	6	127	22	15	11	30
Other Middle East	13	37	19	54	67	116

Source: Swaziland Tourism Authority Note: Data for visitors are compiled from Entry/ Exit Forms completed by all visitors arriving in Swaziland at the entry points. Data excludes arrivals of Swazis.

Table 2: Visitor Arrivals by Length of Stay

Length of Stay (Nights)	2005	2006	2007	2008	2009	2010
Total	1,182,141	1,199,858	1,230,092	1,186,000	1,343,950	1,342,533
Less than 1	344,722	322,046	360,715	429,975	416,399	264,361
1	399,480	378,418	343,877	291,385	381,602	496,108
2	222,981	378,418	343,877	291,385	381,602	287,162
3	96,400	103,395	111,738	89,940	113,580	110,830
4	40,750	37,953	49,640	47,104	48,001	53,342
5	18,720	18,558	22,095	28,483	29,979	30,679
6	12,352	12,977	15,087	13,027	16,238	16,307
7	9,296	9,907	12,653	14,058	12,848	18,656
8-10	12,862	15,070	17,909	17,811	16,328	23,216
11-14	9,296	12,558	18,493	14,867	16,863	11,608
15-29	8,277	12,000	19,467	24,435	22,216	17,550
30-59	5,221	4,605	4,185	5,814	6,246	5,389
60 and over	1,784	2,790	1,362	3,314	3,657	7,325
Average Length of Stay (Nights)						

Source: Exit Survey, Swaziland Tourism Authority

Note: Data for visitors are compiled from an Exit Survey conducted at 9 of the 15 points of exit. Data excludes departing Swaziland residents.

Table 3: Outbound Departures of Swaziland Residents by Mode of Transport

Departures	2005	2006	2007	2008	2009	2010
Total	1,182,141	1,199,858	1,230,092	1,186,000	1,343,950	1,342,533
Air	7,832	7,243	9,861	9,284	9,241	8,772
Land	1,174,309	1,192,615	1,220,231	1,176,716	1,334,709	1,333,761

Source: Department of Immigration

Note: Data for visitors are compiled from Entry/ Exit Forms completed by all departing Swazi residents. Data excludes departures by non-Swazi residents.

Table 4: Hotel Statistics

	2005	2006	2007	2008	2009	2010
Accommodation facilities						
Total	1,182,141	1,199,858	1,230,092	1,186,000	1,343,950	1,342,533
Number	N/A	N/A	N/A	129	142	142
Rooms Available	454,157	456,253	582,602	650,269	590,536	573,149
Room Nights Sold	212,125	227,411	253,896	282,505	311,864	316,230
Domestic Tourists	39,386	53,727	85,556	92,820	121,434	104,303
International Tourists	311,655	316,082	292,642	323,538	334,391	338,033
Total Tourists	351,041	369,809	384,782	416,358	455,825	442,336
Average Nights Spent	1	1	1	1	1	1
Room Occupancy Rate	46.71	49.84	43.58	47.76	52.83	55.17
Total Bill	132,735,760	119,906,632	91,933,553	103,614,596	120,003,966	119,425,729

Source: Central Statistical Office (CSO)

Rooms Available - refers to room-nights available for occupancy. Excludes rooms closed for renovations and staff use as declared in the statutory forms.

Average Nights Spent - refers to total room nights sold by number of rooms available

Table 5: Visitor Arrivals by (a) Profession and (b) Age Group

	2005	2006	2007	2008	2009	2010
Total	1,182,141	1,199,858	1,230,092	1,186,000	1,343,950	1,342,533
Profession						
Professional	314,450	631,125	328,434	277,524	341,363	485,997
Technician	n/a	n/a	169,753	247,874	245,943	177,214
Administration	n/a	n/a	36,903	30,836	32,255	22,823
Managerial	n/a	n/a	137,452	106,740	118,268	173,187
Clerical	n/a	n/a	104,558	100,810	112,892	67,127
Skilled	556,788	188,378	82,416	23,720	25,535	77,867
Semi-skilled	33,100	62,393	n/a	n/a	n/a	n/a
Unskilled	5,911	n/a	n/a	n/a	n/a	n/a
	271,892	317,692	350,576	399,682	467,695	338,318
Age Group (Years)						
18-24	104,028	110,686	110,811	101,258	106,750	96,662
25-34	349,796	337,309	374,583	314,741	352,553	381,279
35-44	405,238	386,365	408,283	337,552	423,865	463,174
45-54	163,845	194,564	175,686	228,397	249,025	228,231
55-64	72,820	85,675	70,119	119,755	117,808	83,237
65+ years	81,922	60,110	47,005	59,146	58,599	36,248
Not stated	4,492	25,150	43,606	25,150	35,351	53,701
	1,182,141	1,199,858	1,230,092	1,186,000	1,343,950	1,342,533

Source: exit Survey, Swaziland Tourism Authority

Note: Data for visitors are compiled from an Exit Survey conducted at 9 of the 15 points of exit. Data excludes departing Swaziland residents.

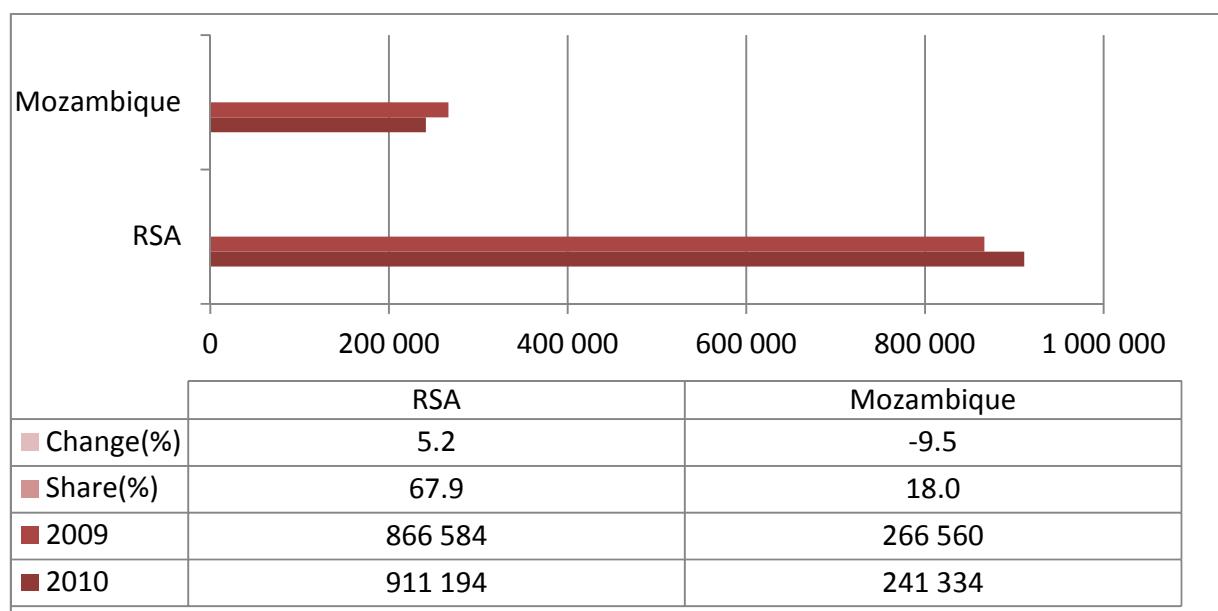
Chapter 4 International Visitor Arrivals

In 2010, South Africa continued to be the largest visitor source market with arrivals remaining robust throughout the year. A total of 911,194 arrivals were recorded accounting for over 67 percent of total arrivals to Swaziland in 2010. Mozambique, another significant source of visitor arrivals for Swaziland continued to under-perform registering a decline of 9.4 percent, to record 241,334 arrivals in 2010. Overall, travel from short-haul markets increased by 2.2 percent with Botswana (+3.1 percent), Kenya (+15.6 percent), Zambia (+17.1 percent) and Zimbabwe (+25.4 percent) performing well.

Conversely, long-haul arrivals performed less favorably resulting in the minimal decline of 0.1 percent in total arrivals to Swaziland in 2010. Travel from Europe accounted for approximately 6.3 percent of total visitor arrivals in 2010, reflecting an overall decline of 24.6 percent when compared to 2009. With the exception of Portugal (+1.5 percent), large traditional markets such as Germany (-27.7 percent), United Kingdom (-9.8 percent), The Netherlands (-44.9 percent), Italy (-10.7 percent) and France (-23.4 percent) remained challenging in terms of travel to Southern Africa.

The Americas improved by a marginal 1.5 percent in 2010 compared to 2009, with USA (+1.4 percent) being the force behind the growth. Travel from South America was uninspiring; with Swaziland's emerging market Brazil recording a decline of 12.8 percent in 2010 compared to 2009.

Figure 1 – Arrivals by Country of Residence, 2010



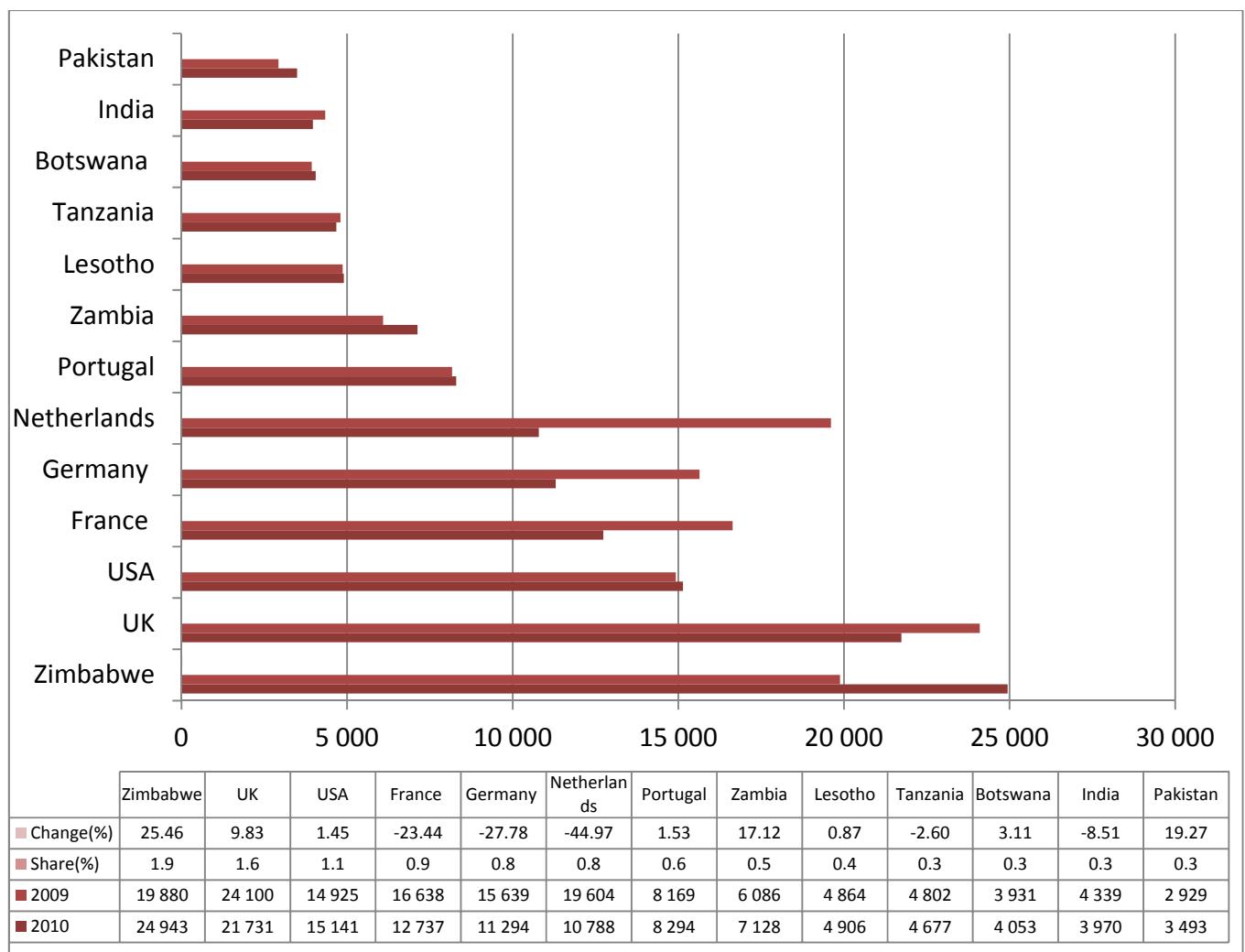


Figure 2: Arrivals by Region, 2010

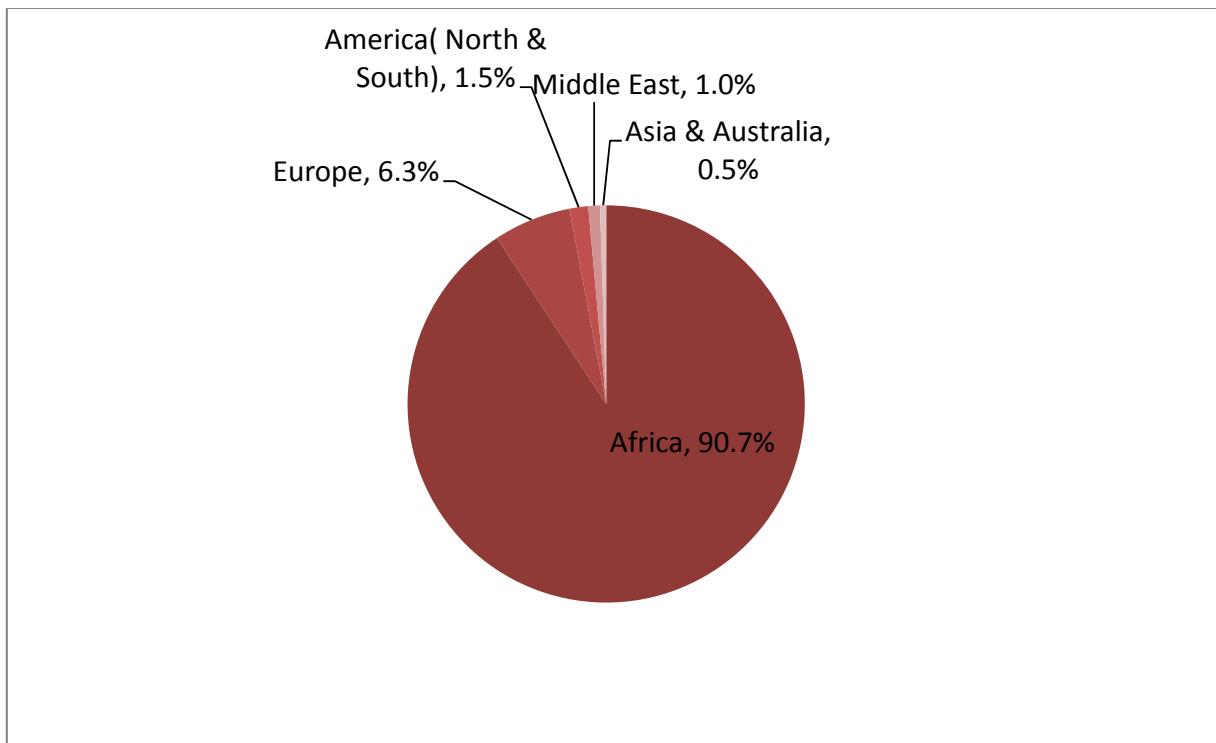


Table 6: Top 10 Growth Source Markets, 2009-2010

	2009	2010	Growth	% Change
Zimbabwe	19,880	24,943	5,062	25.5
Israel	2,929	3,493	565	19.3
Zambia	6,086	7,128	1,042	17.1
Kenya	2,343	2,709	365	15.6
RSA	866,584	911,194	44,610	5.1

Table 7: Top 10 Decline Source Markets, 2009-2010

	2009	2010	Decline	% Change
Belgium	7,892	3,205	-4,687	-59.4
Netherlands	19,604	10,788	-8,816	-45.0
Switzerland	2,561	1,773	-788	-30.8
Germany	15,639	11,294	-4,345	-27.8
Sweden	2,894	2,107	-786	-27.2

Chapter 5 Country Profiles

This chapter entails a more detailed analysis of the character and travel behavior of travellers' to Swaziland from the country's traditional source markets (RSA, Mozambique, United Kingdom, Germany, Netherlands, France and USA).

5.1 Republic of South Africa

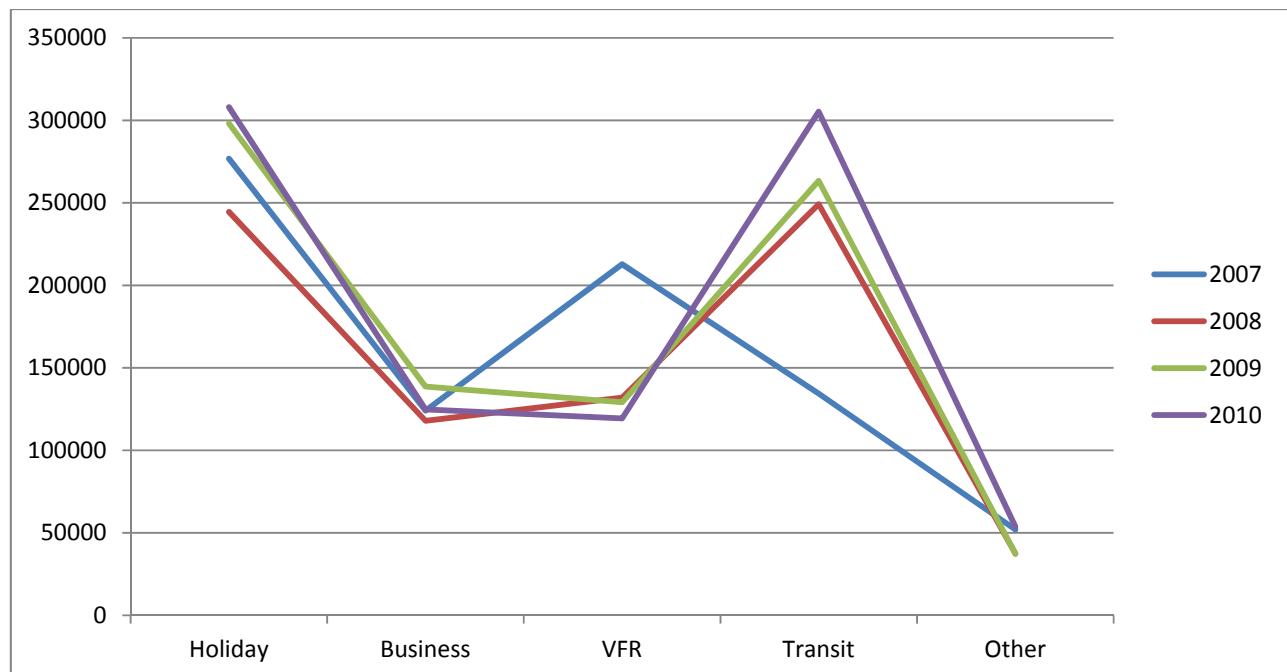
Summary

- In 2010, RSA was Swaziland's largest inbound market, with a total of 911,194 visitors and 67.9 percent of total international visitor arrivals.
- The average length of stay for visitors was 1.8 nights compared to the national average of 3.1 nights.
- South Africans accounted for 45.4 percent of all international visitor nights, making RSA the largest market in terms of visitor nights.

Visitor Arrivals

- Visitor numbers from RSA registered an increase of 5.1 percent, from 866,584 arrivals in 2009 to 911,194 arrivals in 2010.
- There were increases in the holiday and visiting friends and / or relatives market (3.3 percent and 7.6 percent, respectively) and a drop in the business markets (10.0 percent).

Figure 3 – Main purpose of visit, 2007-2010



Repeat visitors

- Just over 14.1 percent of South African visitors to Swaziland were first-time visitors in 2010, a minimal figure when compared to the national average of 39.5 percent first-time visitors.

Travel Partnership

- 23.9 percent of visitors from RSA travelled unaccompanied while 24.9 percent visited Swaziland as adult couples.

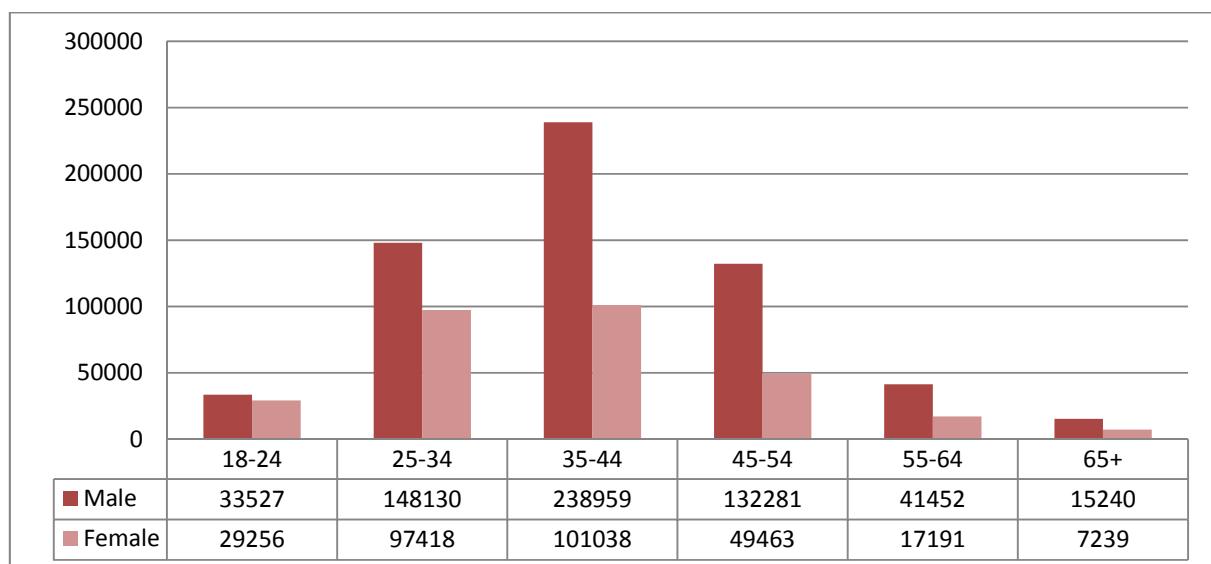
Table 8 – Travel party, 2010

	2007		2008		2009		2010	
	'000	%	'000	%	'000	%	'000	%
Unaccompanied traveller	240,034	30.0	199,199	25.5	204,514	23.6	217,775	23.9
Adult couple	178,425	22.3	198,418	25.4	220,112	25.4	226,887	24.9
Family group – parent(s) and children	167,224	20.9	158,578	20.3	160,318	18.5	189,528	20.8
Friends or relatives	80,011	10.0	132,018	16.9	153,385	17.7	158,548	17.4
Business associates	98,414	12.3	74993	9.6	101,390	11.7	97,498	10.7

Demographics

- The largest demographic share of visitors was persons aged 25-34 years (27.0 percent) and 35-44 years (37.3 percent).

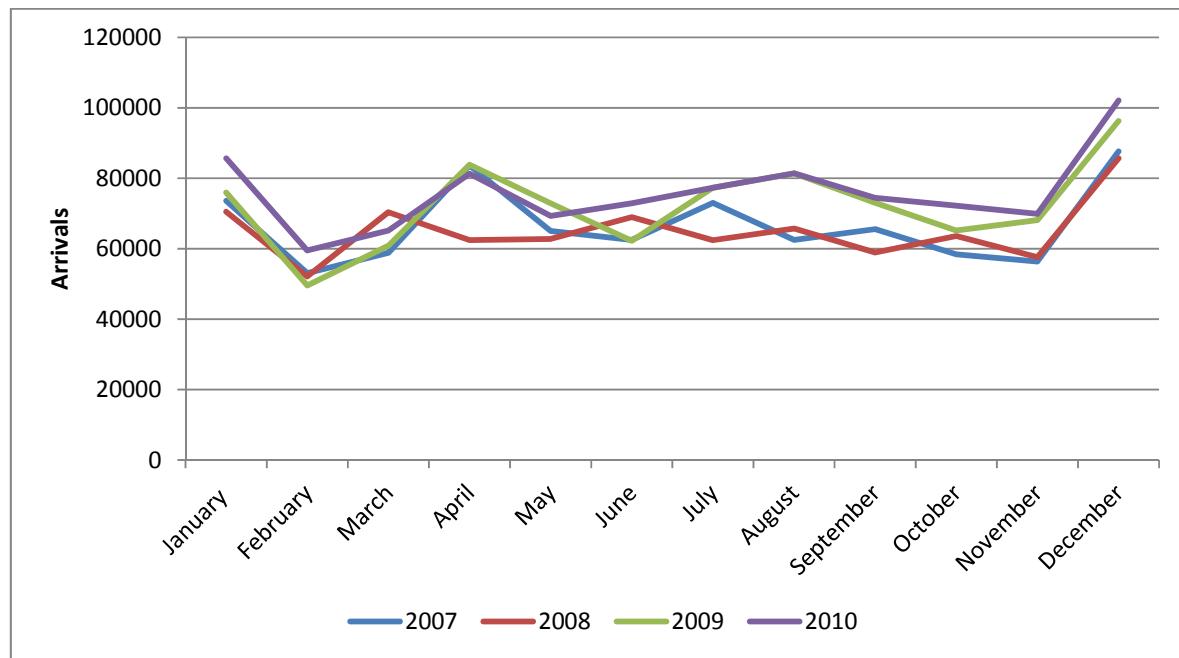
Figure 4 – Age and gender, 2010



Seasonality

- Traditionally, visitor arrivals from RSA are lowest in Autumn period (February-March) and record peaks in December and January.

Figure 5 – Month of arrival, 2007-2010



Length of stay

- Travellers visiting friends and relatives (3.3 nights) recorded the highest average length of stay while holiday and business travellers spent a lesser number of nights (2.1 nights and 1.4 nights, respectively).
- The most preferred type of accommodation was hotels (41.6 percent), chalets in nature/ game reserves (27.2 percent) and B&B (8.4 percent).

Table 9 – Duration of stay by main purpose of visit

	2007		2008		2009		2010	
	Total visitors	Average nights						
Holiday	276,839	2.50	244,507	2.40	298,105	2.14	307,984	2.14
Business	124,018	1.86	117,957	1.65	138,653	1.45	124,834	1.35
Visiting friends or relatives	212,830	2.79	132,018	3.31	129,121	2.92	119,366	3.29
In-transit	134,429	n.a	249,195	n.a	263,442	n.a	305,250	n.a
Other	52,007	1.97	37,496	1.63	37,263	2.54	53,760	1.73

5.2 Mozambique

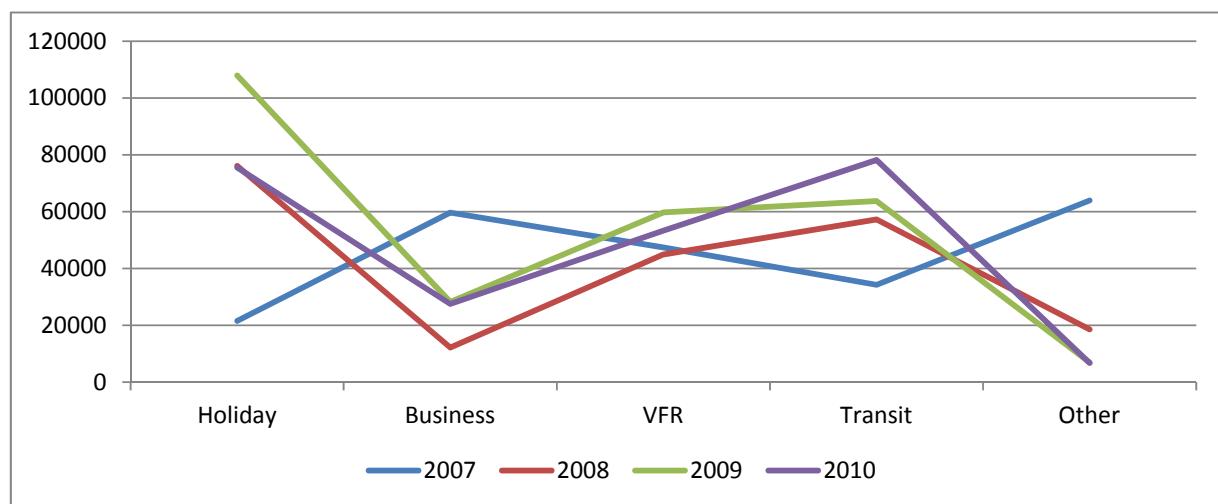
Summary

- In 2010, Mozambique was Swaziland's second largest inbound market, with a total of 241,334 visitors and 18.0 percent of total international visitor arrivals.
- The average length of stay for Mozambicans was a high 8.3 nights compared to the national average of 3.1 nights.
- Visitors from Mozambique accounted for 13.4 percent of all international visitor nights, making Mozambique the second largest market in terms of visitor nights.

Visitor Arrivals

- Visitor numbers from Mozambique registered a disappointing drop of 9.5 percent, from 266,560 arrivals in 2009 to 241,334 arrivals in 2010.
- Declines were recorded from all the segments with the holiday recording accounting for a huge drop of 30.0 percent while the business market recorded -2.6 percent. Those visiting friends and / or relatives also registered a decline of -10.7 percent.

Figure 6 – Main purpose of visit, 2007-2010



Repeat visitors

- Just over 10.5 percent of Mozambican visitors to Swaziland were first-time visitors in 2010, a smaller figure than the national average of 39.5 percent first-time visitors.

Travel Partnership

- 35.9 percent of visitors from Mozambique travelled unaccompanied while 16.7 percent visited Swaziland as adult couples.

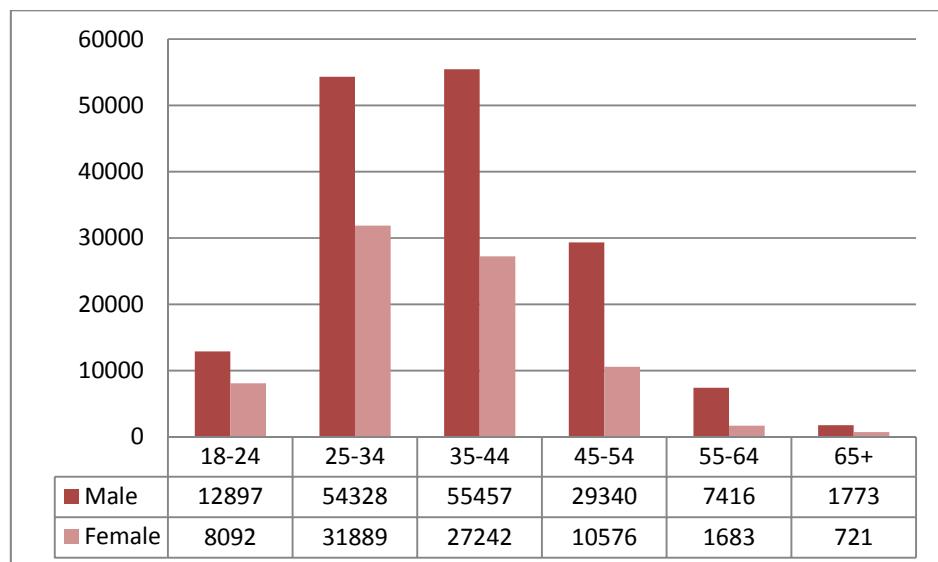
Table 10 – Travel Party, 2010

	2007		2008		2009		2010	
	'000	%	'000	%	'000	%	'000	%
Unaccompanied traveller	121,577	53.6	72,571	34.7	77,302	29.0	86,639	35.9
Adult couple	24,043	10.6	37,854	18.1	46,915	17.6	40,303	16.7
Family group – parent(s) and children	28,126	12.4	47,056	22.5	66,640	25.0	57,679	23.9
Friends or relatives	13,156	5.8	35,972	17.2	58,910	22.1	40,785	16.9
Business associates	32,663	14.4	10,457	5.0	11,995	4.5	12,791	5.3

Demographics

- The largest demographic share of visitors was persons aged 25-34 years (35.7 percent) and 35-44 years (34.3 percent).

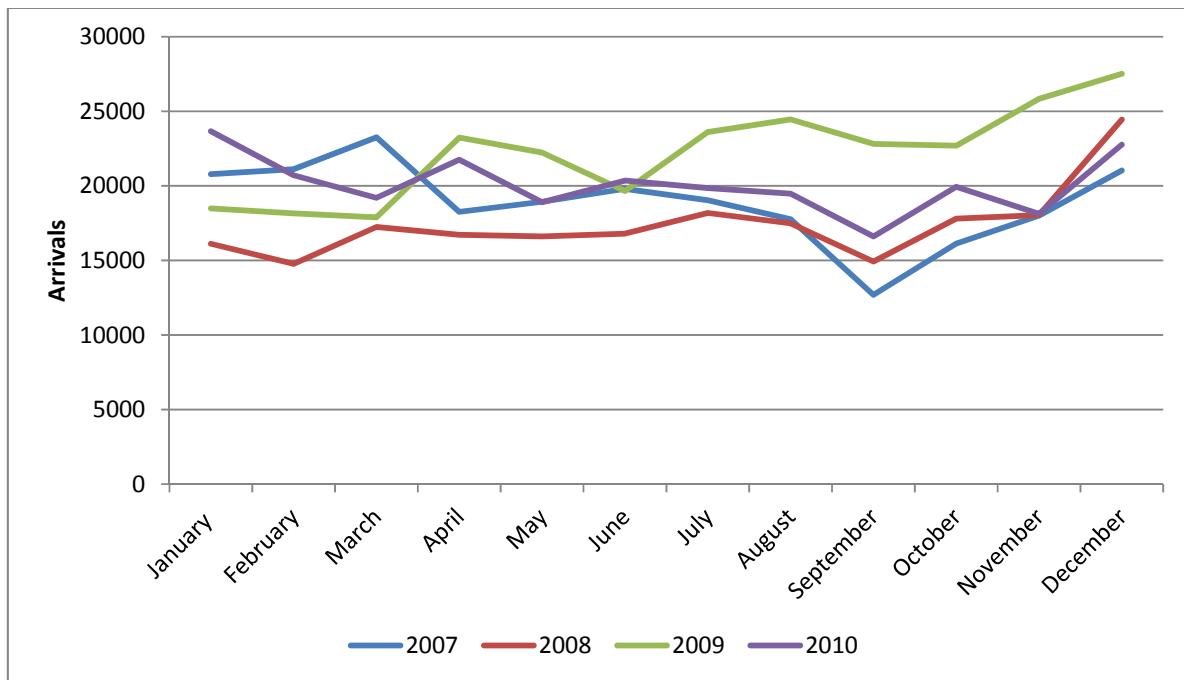
Figure 7 – Age and gender, 2010



Seasonality

- Traditionally, visitor arrivals from Mozambique are highest during the summer period (October-December) with a mini-peak in August.

Figure 8 – Month of arrival, 2007-2010



Length of stay

- Visitors travelling for business (32.8 nights) had the longest average while holiday and VFR spent a lesser number of nights (2.0 nights and 13.8 nights, respectively).
- The most preferred type of accommodation was private (friends and relative) with 40.6 percent, hotels (24.0 percent), and self-catering apartments (8.9 percent).

Table 11 – Duration of stay by main purpose of visit

	2007		2008		2009		2010	
	Total visitors	Average nights						
Holiday	21,548	1.10	76,127	1.41	107,957	1.58	75,538	1.98
Business	59,654	5.40	12,172	5.82	28,255	10.67	27,512	32.80
Visiting friends or relatives	47,406	2.48	44,965	9.65	59,709	11.65	53,335	13.78
In-transit	34,251	n.a	57,262	n.a	63,708	n.a	78,192	n.a
Other	63,964	0.19	18,613	0.63	6,931	8.60	6,757	6.49

5.3 United Kingdom

Population	62,698,362 (July 2011)
Population-major cities	London (capital) 8.615 million; Birmingham 2.296 million; Manchester 2.247 million; West Yorkshire 1.541 million; Glasgow 1.166 million (2009)
GDP – per capita (PPP)	\$35,100 (2010 est.) – country comparison to world: 36
Internet users	51.444 million (2009) – country comparison to world: 7

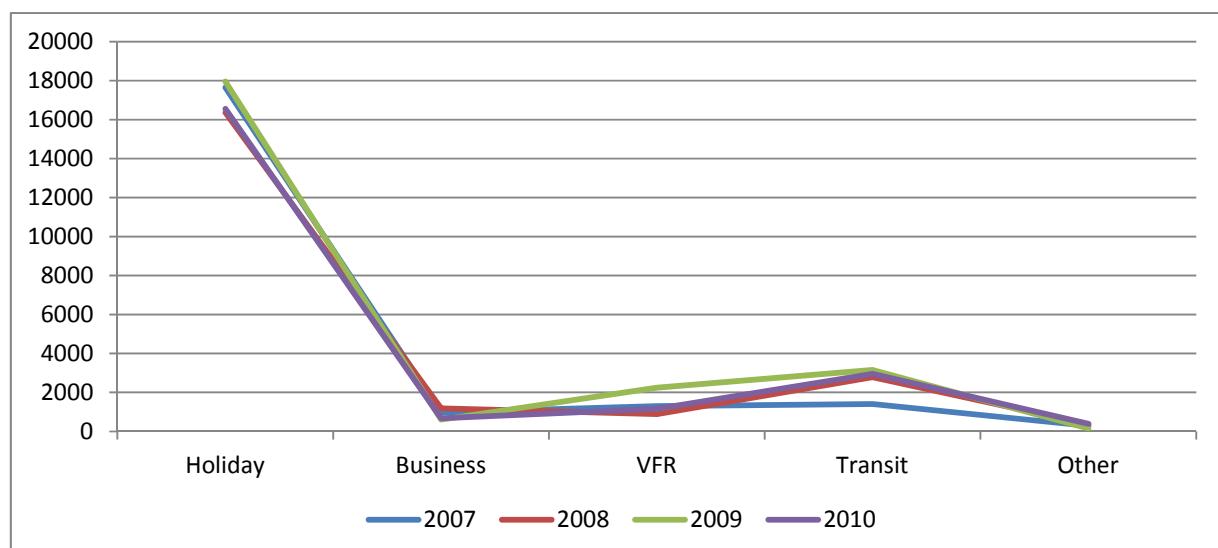
Summary

- In 2010, UK was Swaziland's third largest inbound market, with a total of 21,731 visitors and 17.5 percent of total overseas visitor arrivals.
- The average length of stay for visitors was 2.7 nights compared to the national average of 3.1 nights.
- Visitors from UK accounted for 4.3 percent of all international visitor nights, making UK the sixth largest market in terms of visitor nights.

Visitor Arrivals

- Visitor number from UK registered a noteworthy drop of 9.8 percent, from 24,100 arrivals in 2009 to 21,731 arrivals in 2010.
- There were increases in the holiday and business markets (1.7 percent and 0.6 percent, respectively) and a drop in the visiting friends and / or relatives market (4.0 percent).

Figure 9 – Main purpose of visit, 2007-2010



Repeat visitors

- Just over 79 percent of British travellers to Swaziland were first-time visitors in 2010, a much higher figure when compared to the national average of 39.5 percent first-time visitors.

Travel Partnership

- 9.7 percent of visitors from UK travelled unaccompanied while 46.1 percent visited Swaziland as adult couples.

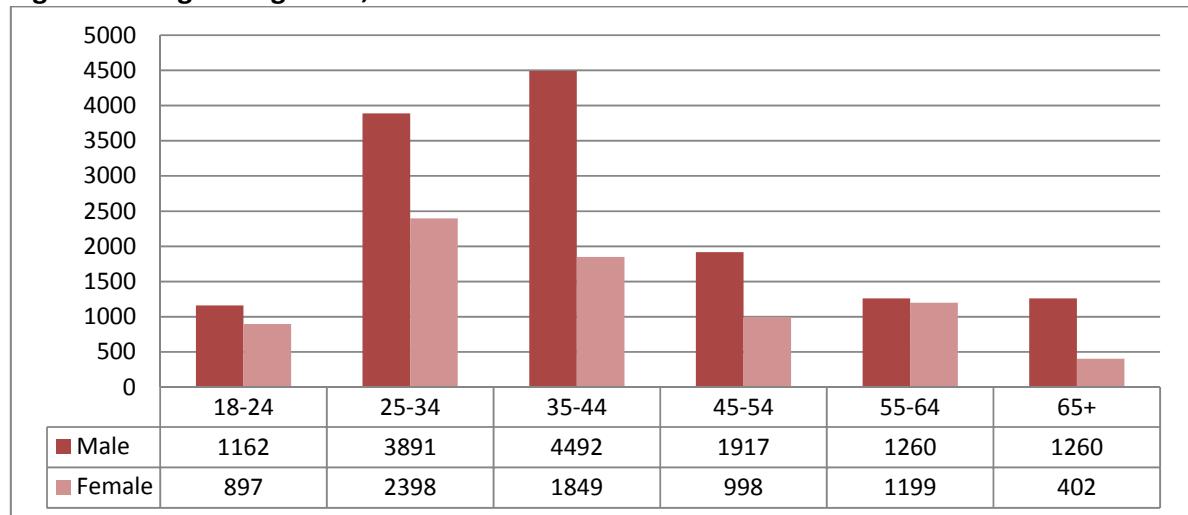
Table 12 – Travel Party, 2010

	2007		2008		2009		2010	
	'000	%	'000	%	'000	%	'000	%
Unaccompanied traveller	17,654	2.15	16,358	3.45	17,955	2.68	16,559	2.86
Adult couple	972	8.71	1,187	11.02	603	4.76	674	4.69
Family group – parent(s) and children	1,296	14.74	885	15.08	2,241	8.48	1,152	2.79
Friends or relatives	1,405	n.a	2,784	n.a	3,156	n.a	2,955	n.a
Business associates	281	19.20	367	18.05	145	7.50	391	7.14

Demographics

- The largest demographic share of visitors were persons aged 25-34 years (29.0 percent) and 35-44 years (29.4 percent).

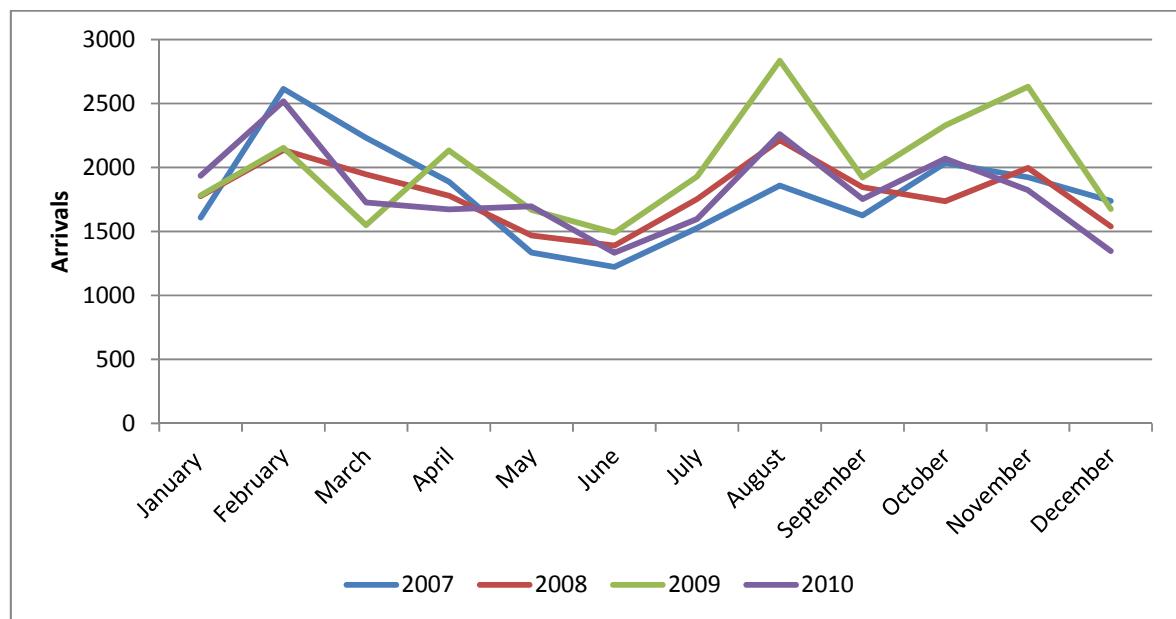
Figure 10 – Age and gender, 2010



Seasonality

- Traditionally, visitor arrivals from UK are lowest during their spring – summer period (April-July) and Christmas period.

Figure 11 – Month of arrival, 2007-2010



Length of stay

- Visitors travelling for business (4.7 nights) had the longest average while holiday and VFR spent a lesser number of nights (2.9 nights and 2.8 nights, respectively).
- The most preferred type of accommodation was hotels (41.0 percent), chalets in nature/ game reserves (22.0 percent) and Backpacker hostels (9.5 percent).

Table 13 – Duration of stay by main purpose of visit

	2007		2008		2009		2010	
	Total visitors	Average nights						
Holiday	17,654	2.15	16,358	3.45	17,955	2.68	16,559	2.86
Business	972	8.71	1,187	11.02	603	4.76	674	4.69
Visiting friends or relatives	1,296	14.74	885	15.08	2,241	8.48	1,152	2.79
In-transit	1,405	n.a	2,784	n.a	3,156	n.a	2,955	n.a
Other	281	19.20	367	18.05	145	7.50	391	7.14

5.4 Germany

Population	81,471,834 (July 2011, est.)
Population-major cities	Berlin (capital) 3.438 million; Hamburg 1.786 million; Munich 1.349 million; Cologne 1.001 million
GDP – per capita (PPP)	\$35,900 (2010 est.) – country comparison to world: 32
Internet users	65.125 million – country comparison to world: 5

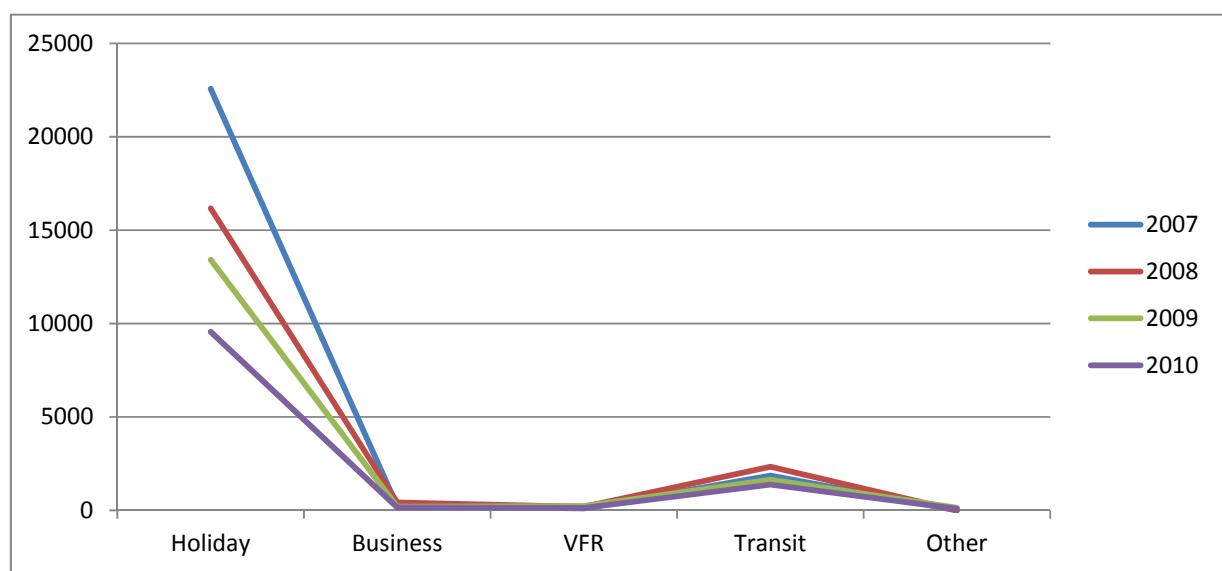
Summary

- In 2010 German was Swaziland's seventh largest inbound market, with a total of 11,294 visitors and 9.1 percent of overseas visitors in total.
- The average length of stay for visitors was 1.6 nights compared to the national average of 3.1 nights.
- Visitors from Germany accounted for 7.1 percent of all international visitor nights, making Germany the third largest market in terms of visitor nights.

Visitor Arrivals

- Visitor number from German registered a significant drop of 27.7 percent, from 15,639 arrivals in 2009 to 11,294 arrivals in 2010.
- There were decreases in the holiday and VFR markets (-1.2 percent and -0.4 percent, respectively) and a marginal growth in the business market (0.1 percent).

Figure 12 – Main purpose of visit, 2007-2010



Repeat visitors

- Just over 91 percent of German visitors to Swaziland were first-time visitors in 2010, reflecting a similarly higher amount compared to the national average of 39.5 percent first-time visitors.

Travel Partnership

- 7.1 percent of visitors from Germany travelled unaccompanied while 51.0 percent visited Swaziland as adult couples.

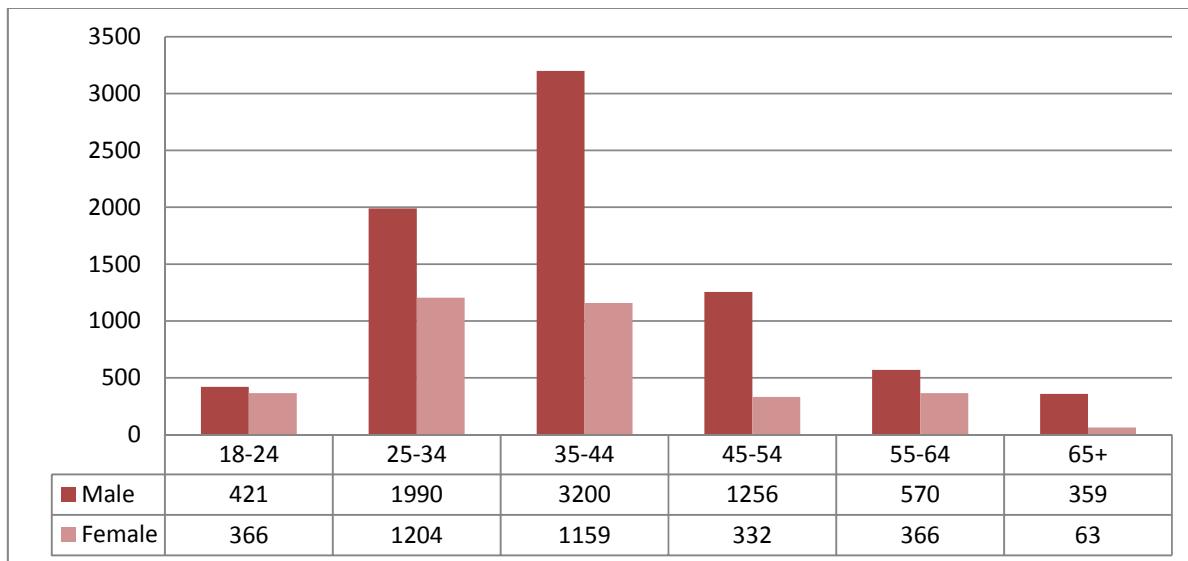
Table 14 – Travel party, 2010

	2007		2008		2009		2010	
	'000	%	'000	%	'000	%	'000	%
Unaccompanied traveller	1510	6.1	892	4.7	672	4.3	802	7.1
Adult couple	8118	32.8	5944	31.1	8820	56.4	5760	51.0
Family group – parent(s) and children	1980	8.0	2848	14.9	2189	14.0	1886	16.7
Friends or relatives	1534	6.2	2809	14.7	2549	16.3	2417	21.4
Business associates	916	3.7	745	3.9	547	3.5	124	1.1

Demographics

- The largest demographic share of visitors were persons aged 35-44 years(38.6 percent) and 25-34 years (28.3 percent).

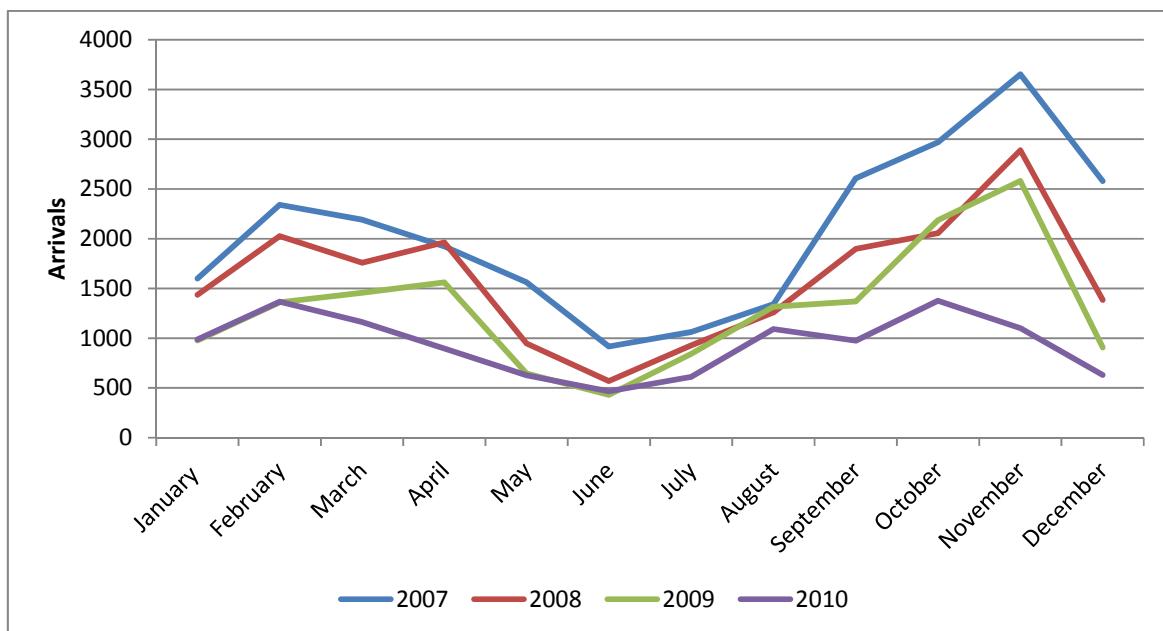
Figure 13 – Age and gender, 2010



Seasonality

- Traditionally, visitor arrivals from Germany are lowest during the festive period (Dec-Jan) and their summer period (Apr-July).

Figure 14 – Month of arrival, 2007-2010



Length of stay

- A comparable length of stay in relation to the main reason for visiting Swaziland was registered by German travelers. Visiting friends and relatives was slightly longer (1.9 nights) than business visits (1.8 nights) and holiday (1.7 nights).
- The most preferred types of accommodation were hotels (45.0 percent), chalets in nature/ game reserves (24.4 percent) and B&B (11.5 percent).

Table 15 – Duration of stay by main purpose of visit

	2007		2008		2009		2010	
	Total visitors	Average nights						
Holiday	22,571	6.1	16,168	4.8	13,418	4.3	9,556	7.1
Business	223	32.8	420	33.8	203	56.5	158	
Visiting friends or relatives	99	8.0	191	17.1	235	13.5	124	
In-transit	1,856	6.2	2,332	15.8	1,642	16.2	1,378	
Other	0	1.1	0	4.5	141	3.6	79	

5.5 Netherlands

Population	16,847,007 (July 2011 est.)
Population-major cities	Amsterdam (capital) 1.044 million; Rotterdam 1.008 million; The Hague (seat of government) 629,000 (2009 est.)
GDP – per capita (PPP)	\$40,500 (2010 est.) – country comparison to world: 18
Internet users	14.872 million – country comparison to world: 27

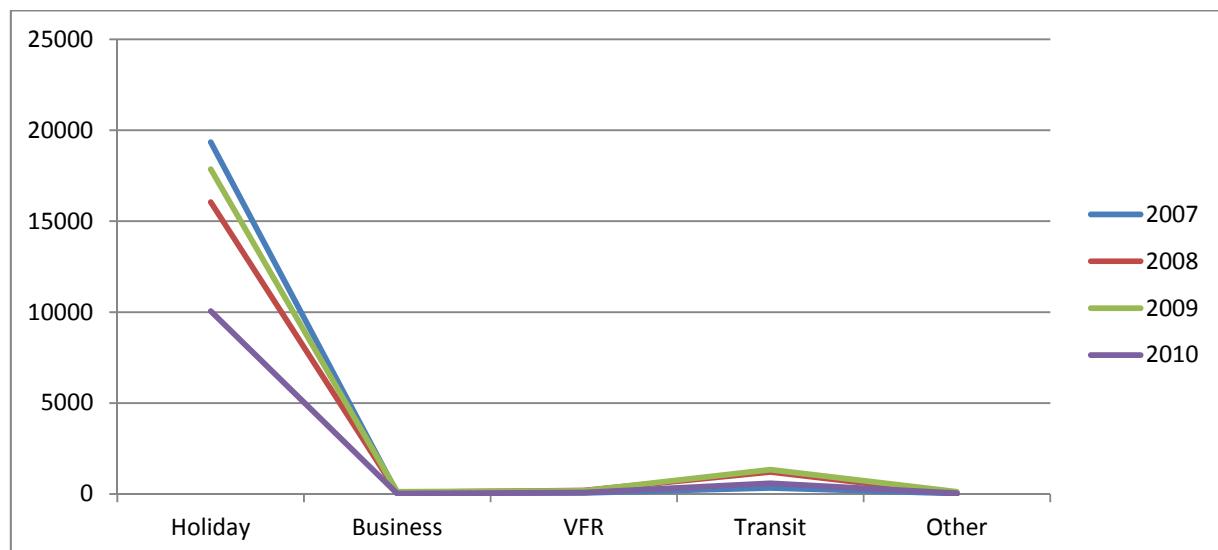
Summary

- In 2010, the Netherlands dropped from being Swaziland's fourth largest inbound market to the eighth spot, with a total of 10,788 visitors and accounting for 8.7 percent of overseas visitors.
- The average length of stay for Dutch visitors was a low 1.6 nights compared to the national average of 3.1 nights.
- Visitors from Netherlands accounted for 5.3 percent of all international visitor nights, making Netherlands the fifth largest market in terms of nights spent.

Visitor Arrivals

- Visitor number from Netherlands registered the most significant drop in overseas arrivals of 45.0 percent, from 19,604 arrivals in 2009 to 10,788 arrivals in 2010.
- However, in spite of the drop in visitor numbers, an increase in the holiday market (1.9 percent) was registered while business (-0.4 percent) and VFR (-0.8 percent) declined.

Figure 15 – Main purpose of visit, 2007-2010



Repeat visitors

- A high 90.2 percent of Dutch visitors to Swaziland were first-time visitors in 2010.

Travel Partnership

- 57.5 percent of visitors from Netherlands travelled in pairs while 3.3 percent were unaccompanied.

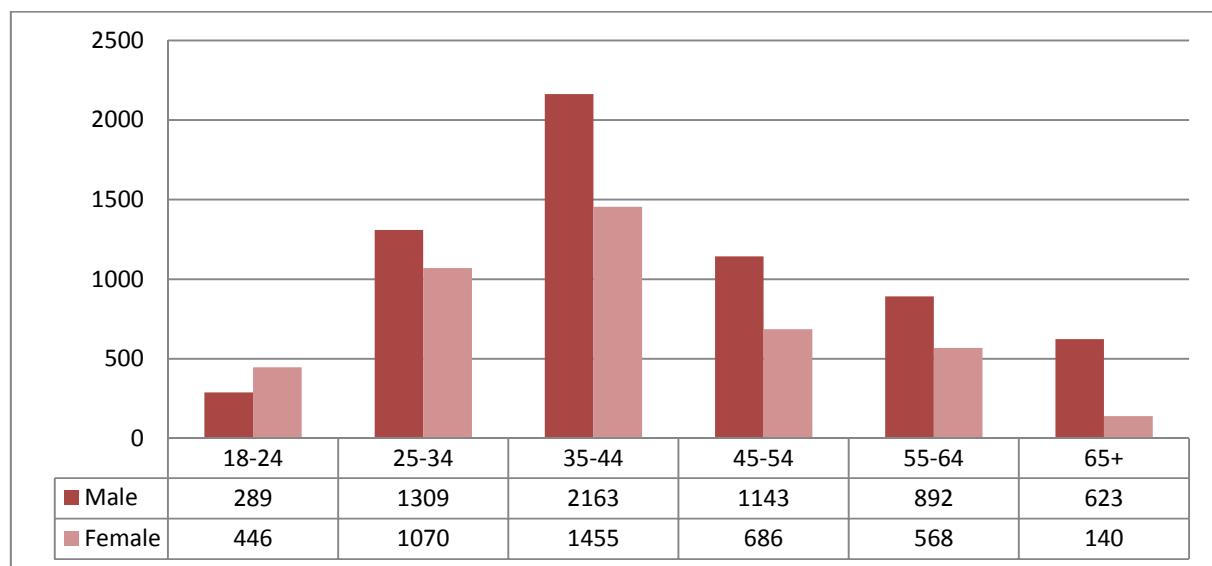
Table 16 – Travel Party, 2010

	2007		2008		2009		2010	
	'000	%	'000	%	'000	%	'000	%
Unaccompanied traveller	1,801	5.7	351	2.0	490	2.5	356	3.3
Adult couple	6,255	29.5	7,724	44.0	11,410	58.2	6,203	57.5
Family group – parent(s) and children	2,316	12.2	4,318	24.6	3,176	16.2	1,737	16.1
Friends or relatives	1,267	4.8	2,458	14.0	3,627	18.5	2,071	19.2
Business associates	79	0.4	474	2.7	294	1.5	43	0.4

Demographics

- Visitors aged 25-44 years accounted for the largest demographic group of Dutch visitors to Swaziland with persons aged 25-34 years recording 21.9 percent and 35-44 years registering 33.8 percent.

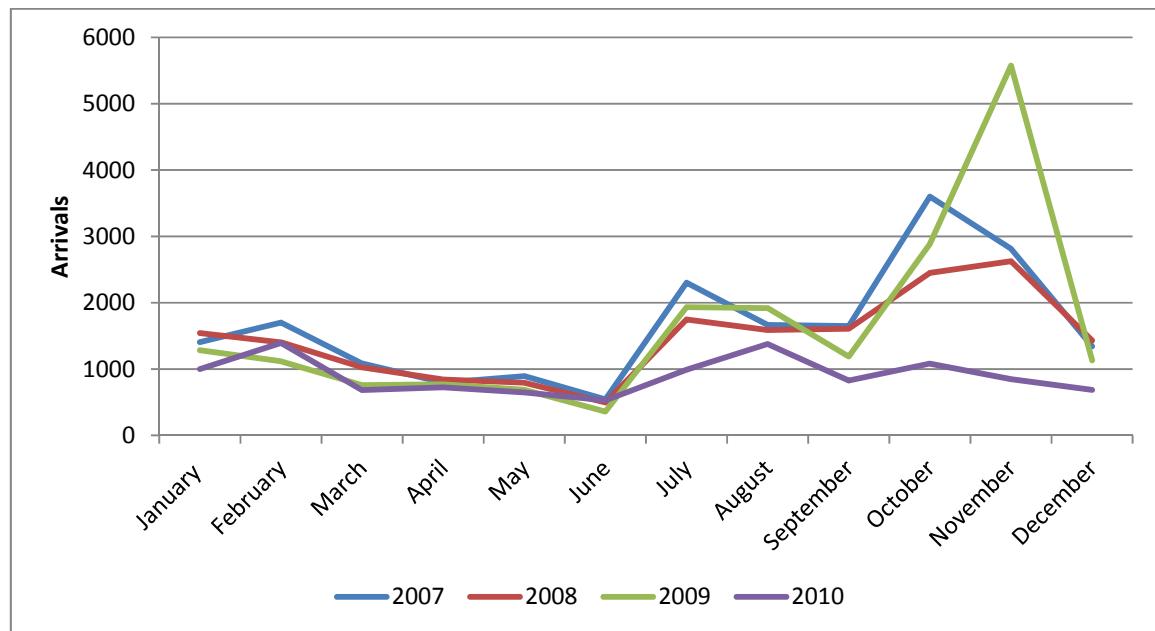
Figure 16 – Age and gender, 2010



Seasonality

- Traditionally, visitor arrivals from Netherlands like most travelers from Europe to Southern Africa are lowest during the summer period and December.

Figure 17 – Month of arrival, 2007-2010



Length of stay

- Travelers visiting friends and or relatives spent the most nights (4.0 percent) while holiday visitors spent a lesser 1.6 nights and business travelers as even lower 1.0 nights.
- The most preferred types of accommodation were hotels (43.7 percent), nature/ game reserve chalets (29.8 percent) and B&B (7.2 percent).

Table 17 – Duration of stay by main purpose of visit

	2007		2008		2009		2010	
	Total visitors	Average nights						
Holiday	19,340	1.55	16,044	1.72	17,859	1.63	10,054	1.57
Business	40	6.00	88	7.56	118	3.67	22	1.00
Visiting friends or relatives	59	15.50	193	4.53	176	1.63	76	4.00
In-transit	336	n.a	1,211	n.a	1,333	n.a	593	n.a
Other	20	4.00	18		118		43	1.00

5.6 France

Population	65,312,249 (July 2011 est.)
Population-major cities	Paris (capital) 10.41 million; Marseille-Aix-en-Provence 1.457 million; Lyon 1.456 million; Lille 1.028 million; Nice-Cannes 977,000 (2009)
GDP – per capita (PPP)	\$33,300 (2010 est.) – country comparison to world: 39
Internet users	45.262 million – country comparison to world: 8

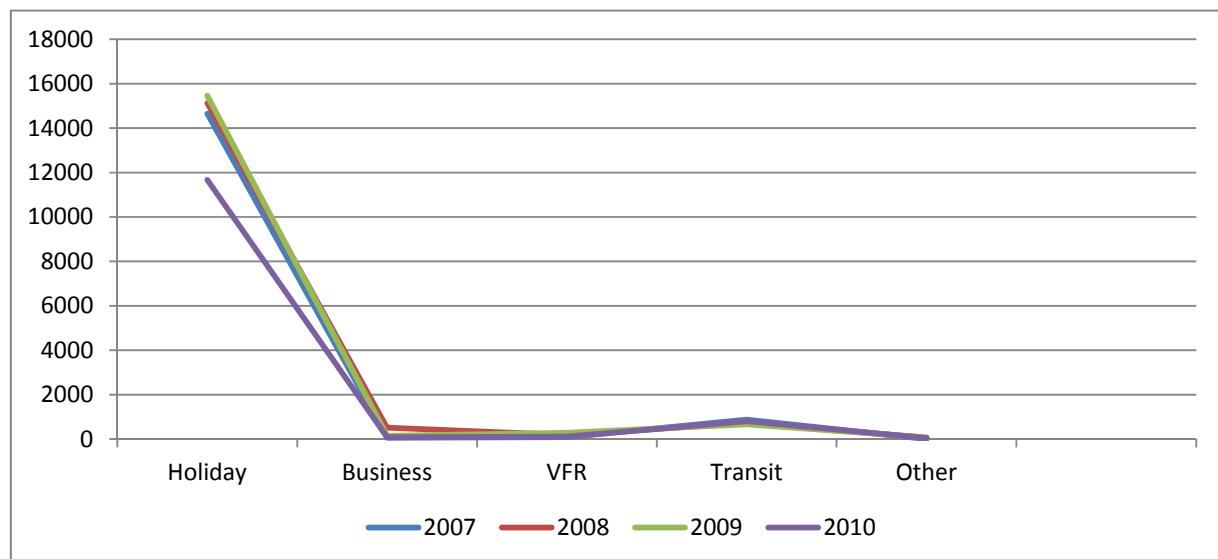
Summary

- In 2010, France was the only overseas source market to maintain the same ranking in terms of visitor volumes (sixth), with a total of 12,737 arrivals and a share of 10.2 percent of overseas arrivals.
- However, the average length of stay was a low 1.5 nights compared to the national average of 3.1 nights.
- Visitors from France accounted for 5.5 percent of all international visitor nights, making France the fourth largest market in terms of nights.

Visitor Arrivals

- Visitor numbers from France registered a drop of 23.4 percent, from 16,638 arrivals in 2009 to 12,737 arrivals in 2010.
- Decreases were recorded in the holiday and VFR markets (-1.4 percent and -0.81 percent, respectively) and a marginal increase of 0.1 percent from business travelers.

Figure 18 – Main purpose of visit, 2007-2010



Repeat visitors

- Just over 92 percent of French visitors to Swaziland were first-time visitors in 2010.

Travel Partnership

- 5.9 percent of visitors from Germany travelled unaccompanied while 53.9 percent visited Swaziland as adult pairs.

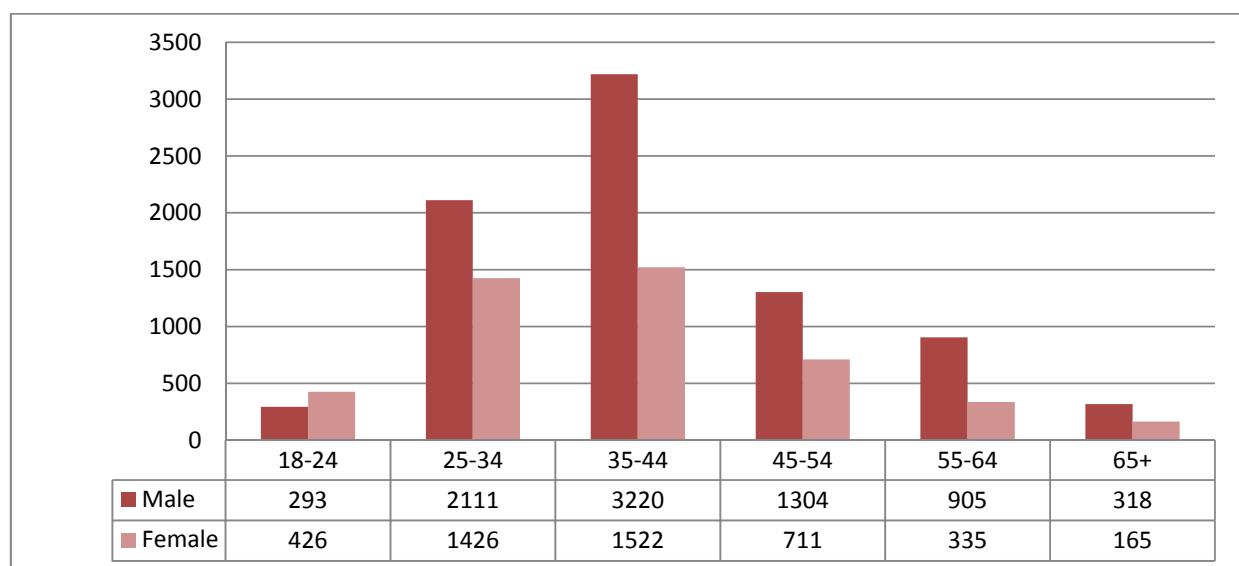
Table 18 – Travel party, 2010

	2007		2008		2009		2010	
	'000	%	'000	%	'000	%	'000	%
Unaccompanied traveller	894	5.7	565	3.4	1,264	7.6	751	5.9
Adult couple	4,626	29.5	6,332	38.1	8,718	52.4	6,864	53.9
Family group – parent(s) and children	1,913	12.2	2,975	17.9	2,579	15.5	2,2458	19.3
Friends or relatives	753	4.8	2,493	15.0	2,446	14.7	2,114	16.6
Business associates	220	1.4	848	5.1	765	4.6	178	1.4

Demographics

- The largest demographic shares of visitors were persons aged 35-44 years (37.6 percent) and 25-34 years (37.7 percent).

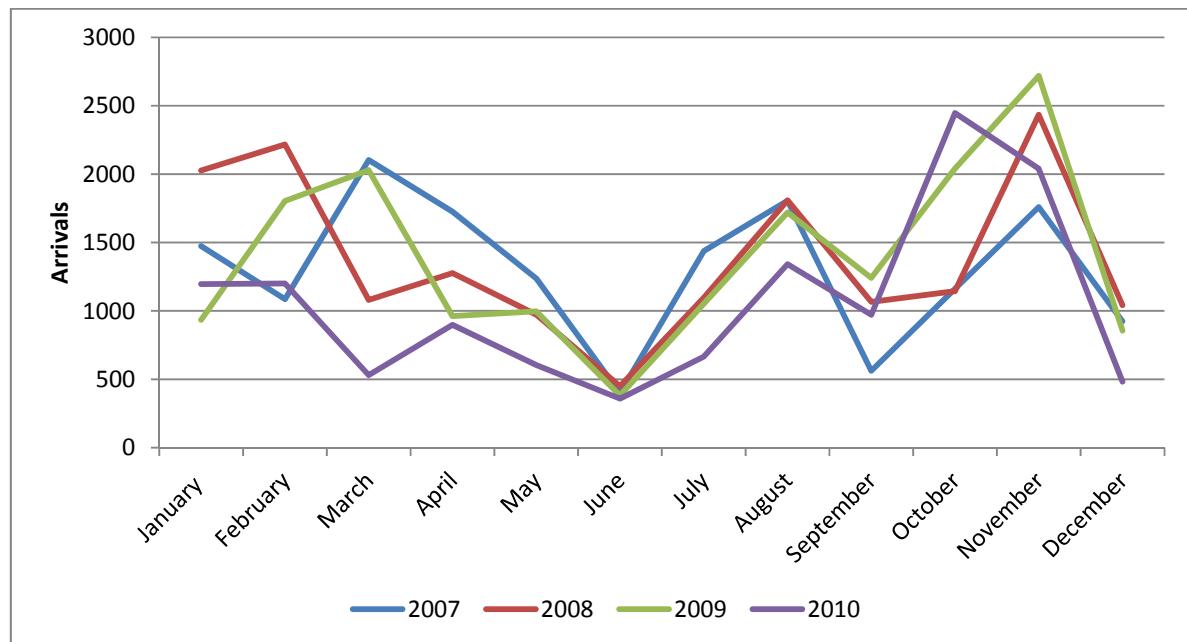
Figure 19 – Age and gender, 2010



Seasonality

- Traditionally, visitor arrivals from France are lowest during the months Mar-July and the festive month of December.

Figure 20 – Month of arrival, 2007-2010



Length of stay

- Business and visiting friends and/ or relatives travel recorded high figures of 9.5 nights and 4.4 nights, respectively while travel for holiday had a lower 1.5 nights.
- The most preferred types of accommodation were hotels (52.2 percent), B&B (10.3 percent) and nature/ game reserve chalets (22.9 percent).

Table 19 – Duration of stay by main purpose of visit

	2007		2008		2009		2010	
	Total visitors	Average nights						
Holiday	14,645	1.30	15,123	1.53	15,457	1.51	11,664	1.48
Business	63	10.00	515	7.86	150	6.60	89	9.50
Visiting friends or relatives	94	1.00	183	1.80	283	1.80	115	4.40
In-transit	878	n.a	732	n.a	665	n.a	812	n.a
Other	0	1.00	66		83	5.67	51	

5.7 USA

Population	313,232,044 (July 2011, est.)
Population-major cities	New York-Newark 19.3 million; Los Angeles-Long Beach-Santa Ana 12.675 million; Chicago 9.134 million; Washington D.C. (capital) 4.421 million (2009)
GDP – per capita (PPP)	\$47,400 (2010 est.) – country comparison to world: 10
Internet users	245 million (2009) – country comparison to world: 2

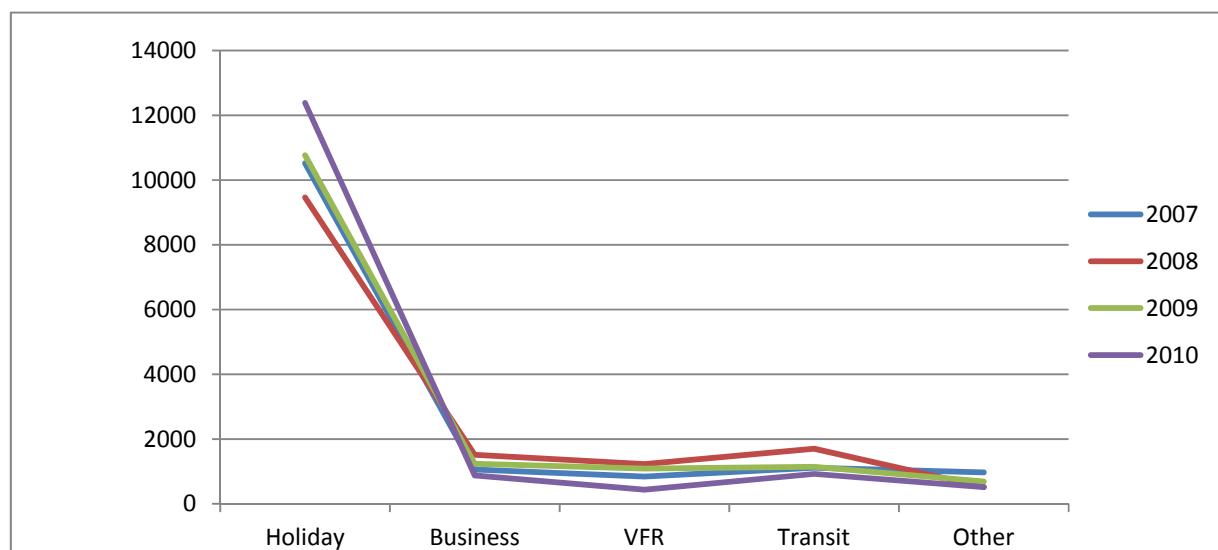
Summary

- In 2010, USA ranked three spots higher than in 2009 from being Swaziland's eighth largest inbound market to the fifth spot, with a total of 15,141 visitors and accounting for 12.2 percent of overseas arrivals.
- The average length of stay for visitors was a significant 4.8 nights compared to the national average of 3.1 nights.
- Americans accounted for 3.7 percent of all international visitor nights, making USA the seventh largest market in terms of nights.

Visitor Arrivals

- USA was the only source market in the top 10 to register an increase in 2010 (1.4 percent) 14,925 arrivals in 2009 to 15,141 arrivals in 2010.
- There was an increase in the holiday market (9.8 percent) and decreases in the business and visiting friends and/ or relatives markets (2.7 percent and 4.4 percent, respectively).

Figure 21 – Main purpose of visit, 2007-2010



Repeat visitors

- Four of five American visitors to Swaziland were first-time visitors in 2010, while 8.3 percent were visiting the country for the second time.

Travel Partnership

- 12.0 percent of visitors from USA travelled unaccompanied while 36.4 percent visited Swaziland as adult couples.

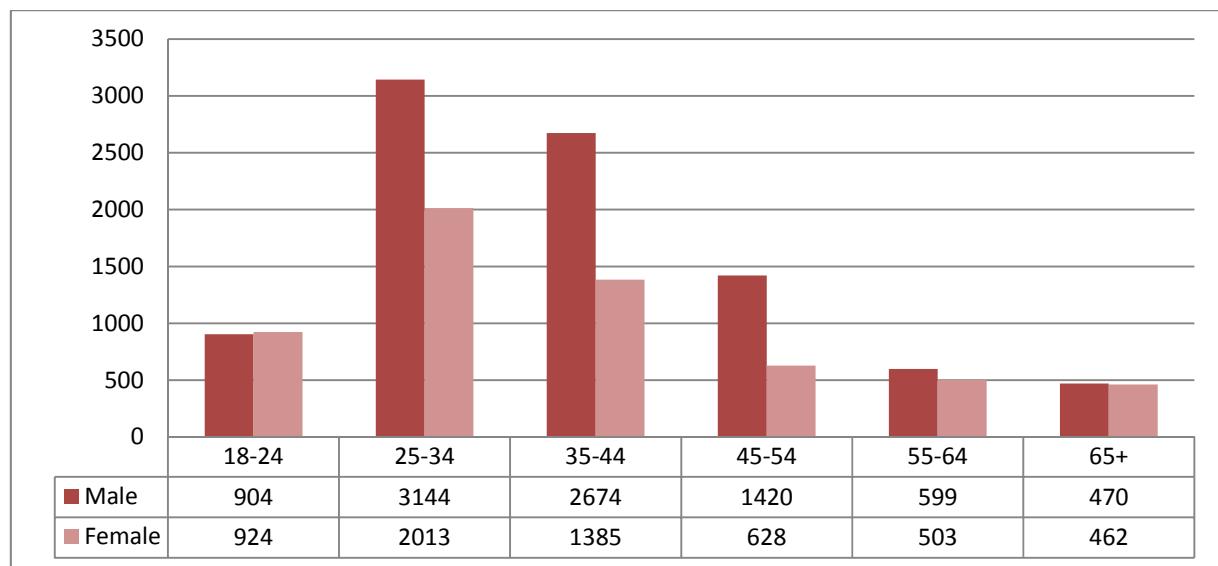
Table 1 – Travel party, 2010

	2007		2008		2009		2010	
	'000	%	'000	%	'000	%	'000	%
Unaccompanied traveller	2,220	15.3	2,250	15.6	1,836	12.3	1,817	12.0
Adult couple	3,554	24.5	3,576	24.8	4,209	28.2	5,511	36.4
Family group – parent(s) and children	2,031	14.0	2,307	16.0	2,448	16.4	2,544	16.8
Friends or relatives	1,668	11.5	4,312	29.9	4,134	27.7	3,482	23.0
Business associates	2,771	19.1	1,298	9.0	1,537	10.3	1,075	7.1

Demographics

- The largest demographic share of visitors were persons aged 25-34 years (34.0 percent) and 35-45 years (27.8 percent).
- In 2010, the number of American aged between 20-29 years was 45.8 percent or 3.6 higher than in 2009.

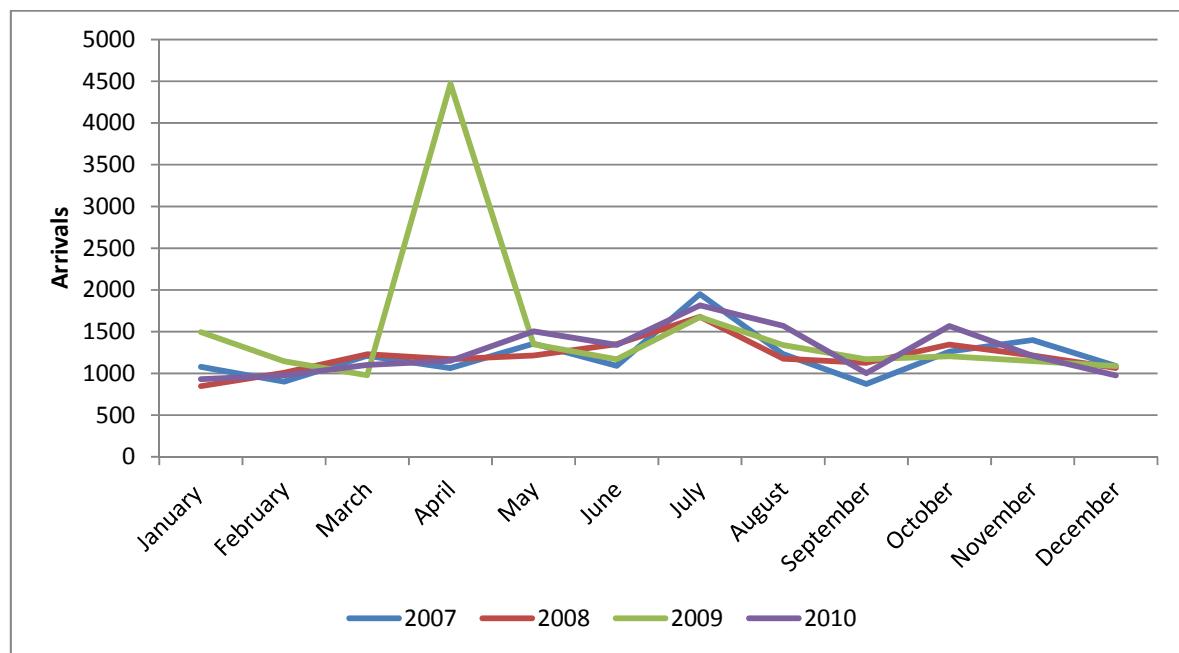
Figure 22 – Age and gender, 2010



Seasonality

- The seasonality of arrivals from American visitors is somewhat linear, with a slight dip in the summer months (Dec-Feb).

Figure 23 – Month of arrival, 2007-2010



Length of stay

- Business travelers stayed the longest recording 25.4 nights. Also spending significantly longer nights were those visiting friends and/ or relatives with 7.1 percent. Holiday travelers spent fewer periods in Swaziland with an average of 2.2 nights.
- The most preferred types of accommodation were hotels (37.9 percent), backpacker hostels (10.7 percent) and nature/ game reserve chalets (24.9 percent).

Table 21 – Duration of stay by main purpose of visit

	2007		2008		2009		2010	
	Total visitors	Average nights						
Holiday	10,518	2.77	9,460	3.61	10,761	3.17	12,385	2.20
Business	1,059	13.30	1,514	13.57	1,239	10.34	878	25.43
Visiting friends or relatives	841	6.11	1,226	8.93	1,090	7.37	439	7.10
In-transit	1,118	n.a	1,702	n.a	1,148	n.a	924	n.a
Other	972		519	18.26	687	14.26	515	

Chapter 6 Seasonality

Visitations to Swaziland were highest in the fourth quarter (October, November, and December) with 356,347 arrivals occurring at this time. This was followed with 25.2 percent visiting during the second quarter (April, May and June) and 24.4 percent visiting during the third quarter (July, August and September). The first quarter of the year accounted for the least number of arrivals, registering a total of 320,861 international visitor arrivals.

Figure 24: Seasonality of Visitor Arrivals, 2008-2010

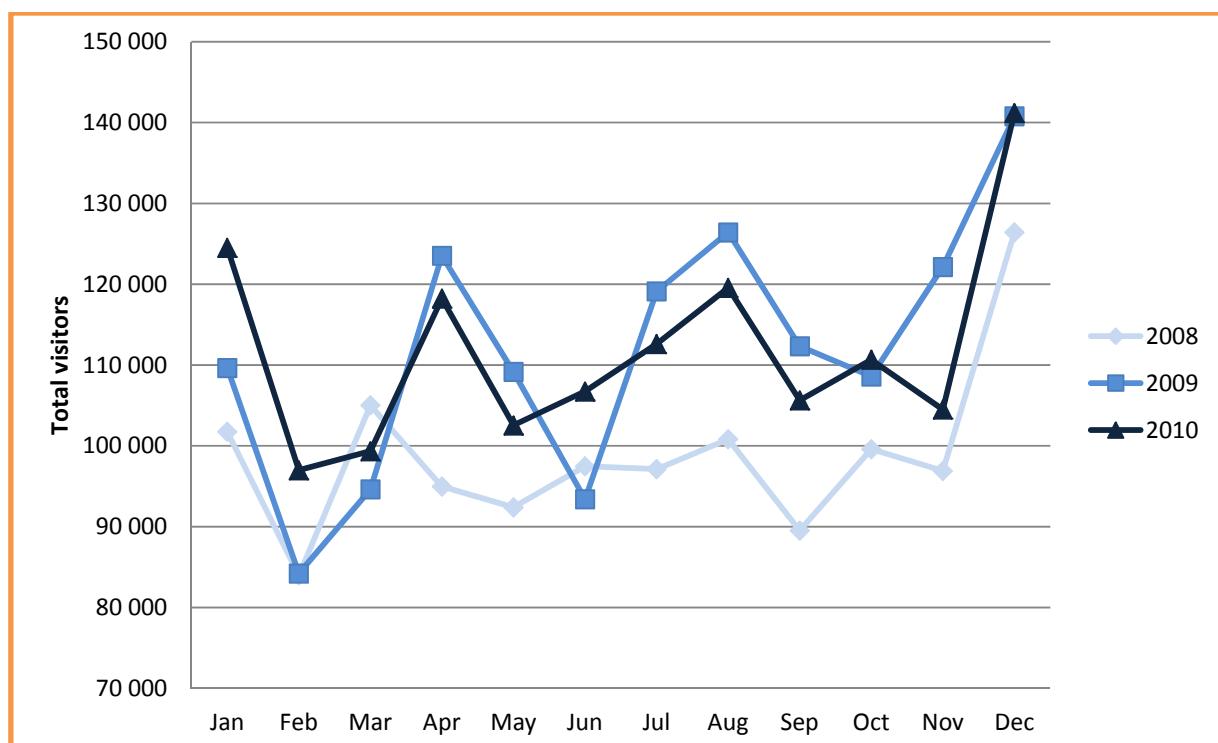


Table 22: International Visitors by Season, 2010

Season	Number of visitors	% of total visitors
Summer (Nov-Jan)	370,195	27.6
Autumn (Feb-Apr)	314,574	23.4
Winter (May-Jul)	321,903	24.0
Spring (Aug-Oct)	335,861	25.0

Source: Entry/Exit Cards- Department of Immigration, 2010

A total of 442,336 overnight visits were made in formal accommodation during the year, with 27.1 percent overnight visits occurring in the fourth quarter. Peak months for overnight visits were August (10.4 percent), October (9.6 percent) and December (9.1 percent). Although the

trend in the peak of international overnight visits was identical to that of overall overnight visits, domestic overnight visitors were highest in August (9.8 percent), November (9.1 percent) and April (9.1 percent). Troughs were registered in the first two months of the year January (6.9 percent) and February (7.0 percent). During the hosting of the Soccer World Cup in 2010 in South Africa in the month of June, a decline of 11.4 percent in overnight visitors was noted making it the third lowest month in terms of overnight visits within formal accommodation.

Figure 25: Seasonality of Visitors Arrivals and Overnights Visits in Formal Accommodation, 2010

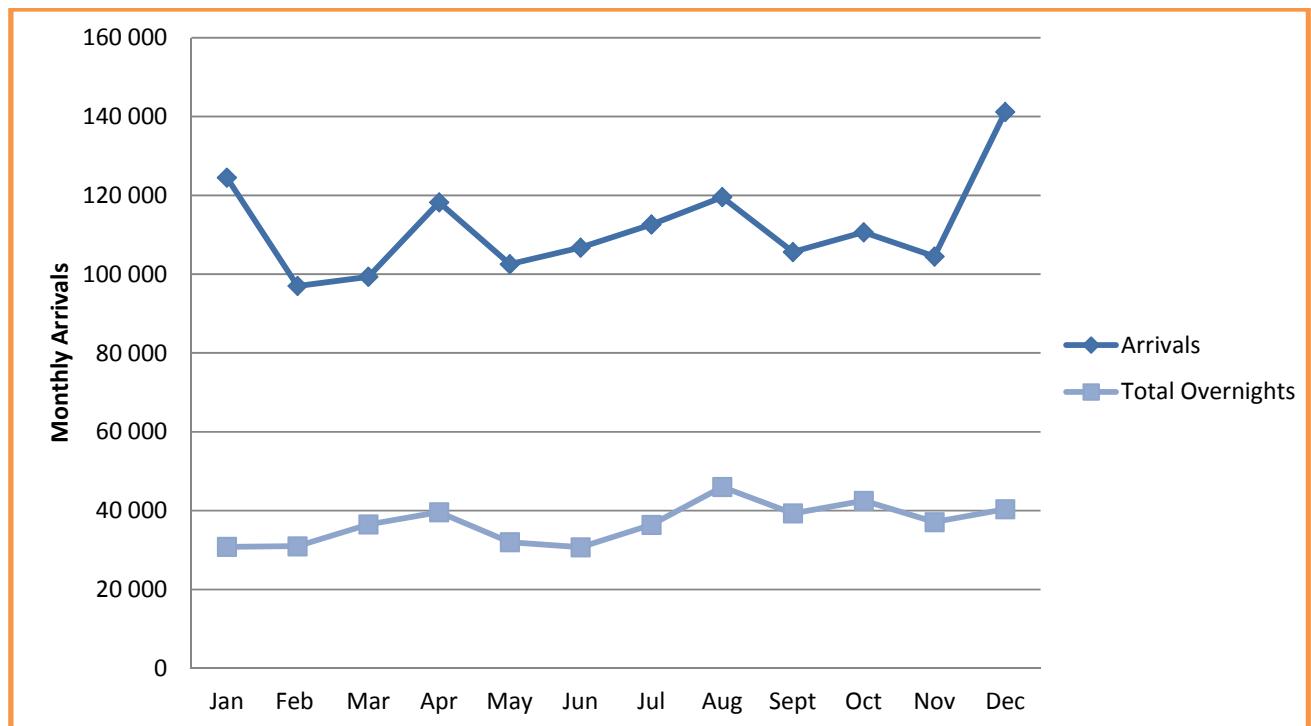
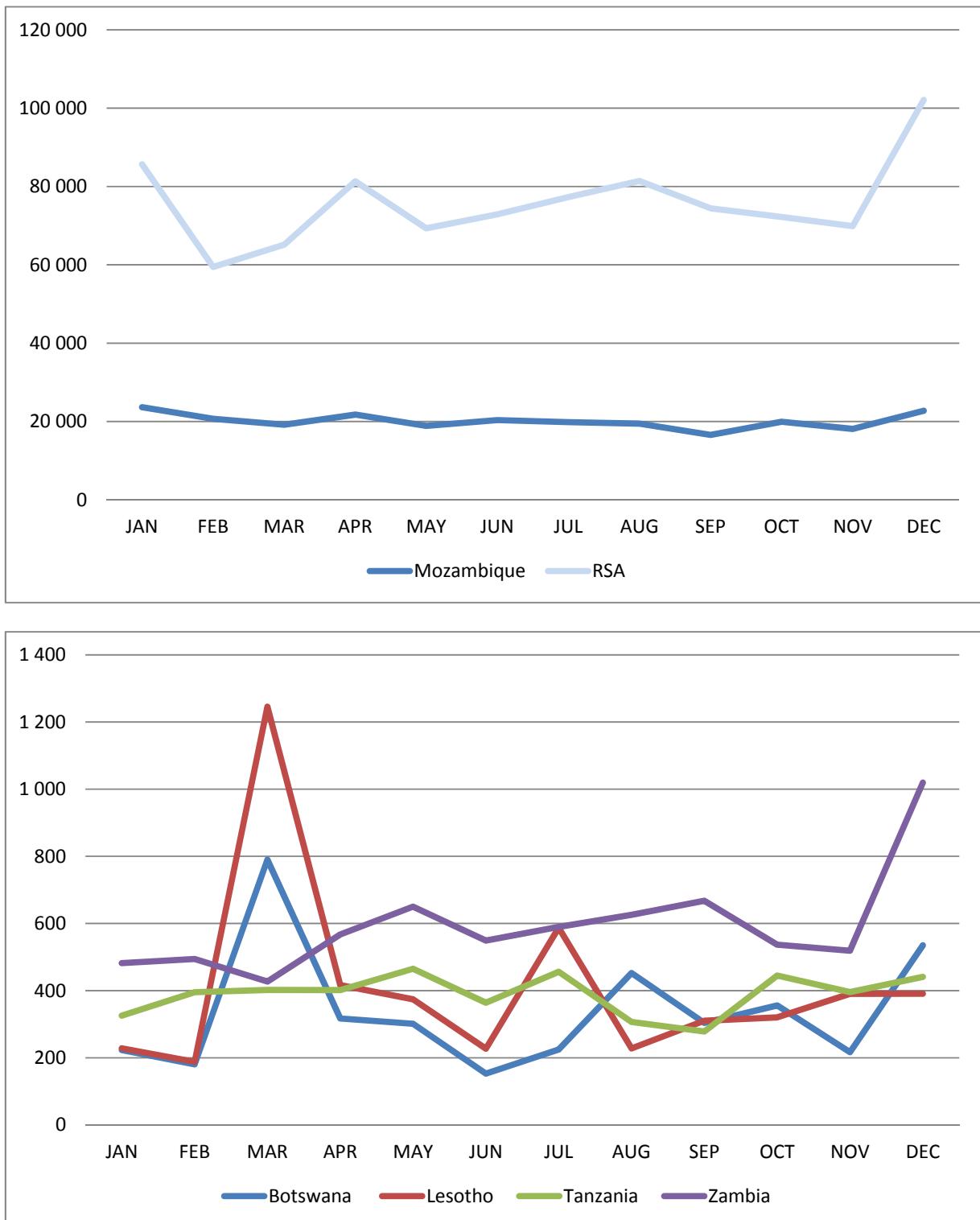
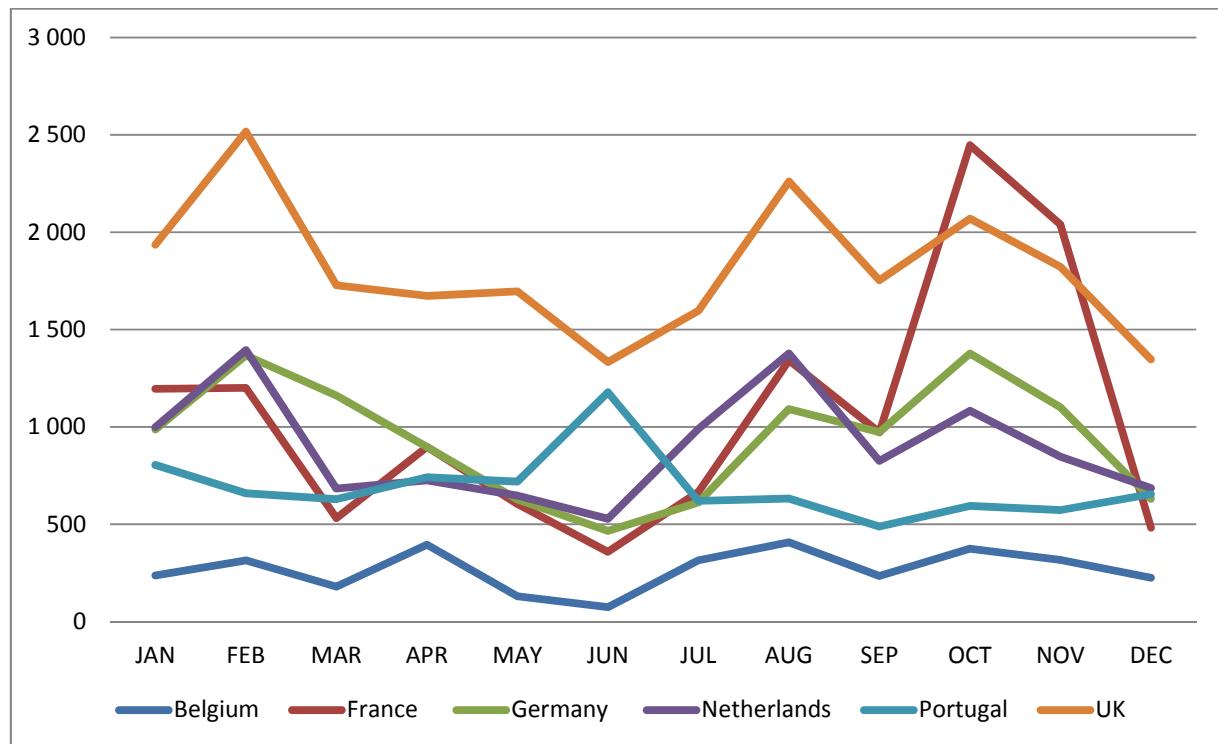


Figure 26: Sub-Saharan Africa Markets Seasonality



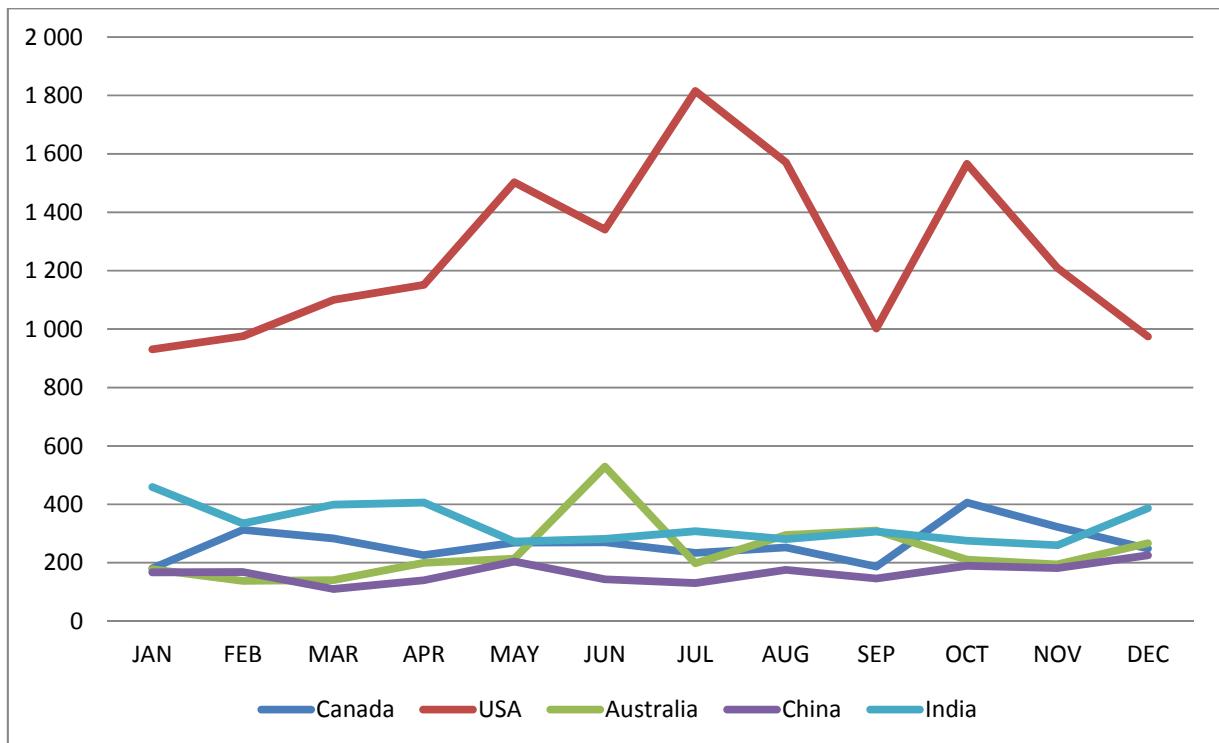
Regional markets appeared to have higher figures in two separate periods of the year. In addition to a peak season during the summer months, these markets recorded a second peak in the month of March. This double peak pattern is depicted in Figures (). From Lesotho arrivals, the second peak was observed during the winter month of July, followed by a slowdown in August.

Figure 27: European Markets Seasonality



When comparing the monthly series for traditional European markets, they all were a very important source of arrivals during the summer season (winter season in their countries), but slowed down during the winter period (summer months in their countries).

Figure 28: Americas, Asia and Australia Markets Seasonality

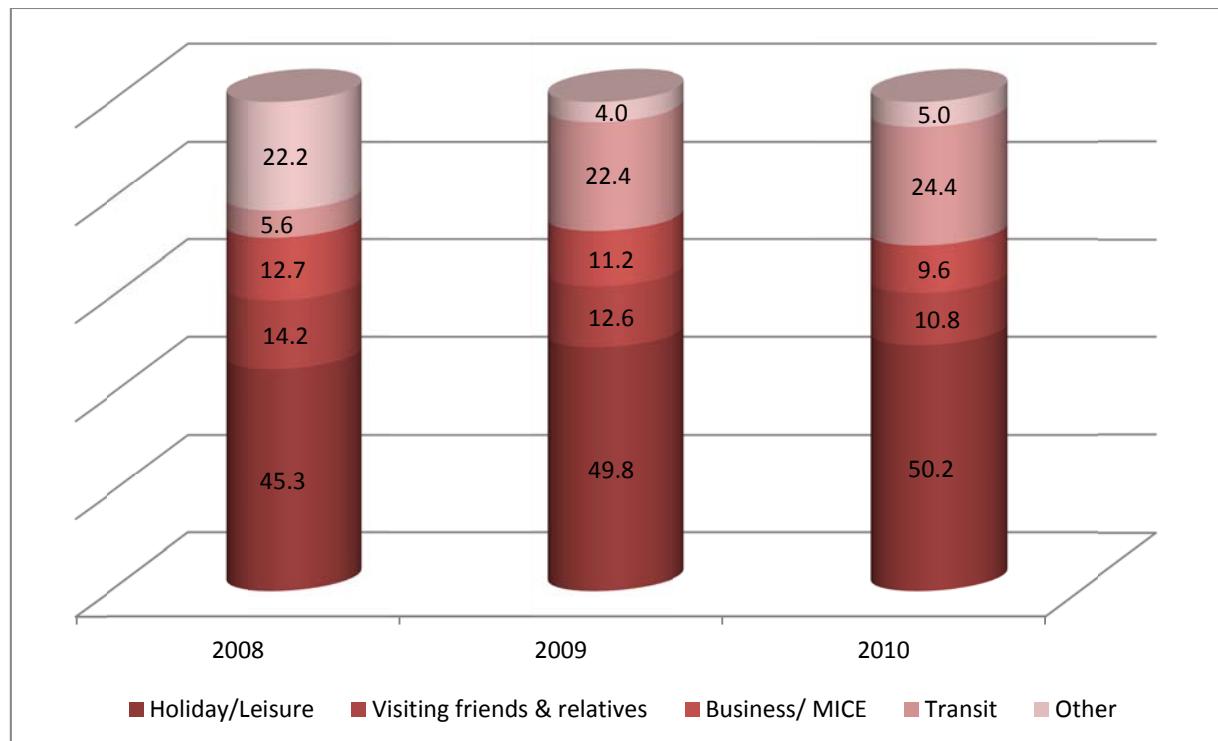


This group of markets displayed the lowest seasonality variation with steady arrivals throughout the year. However, USA – the only market outside Asia and the Pacific – showed a more pronounced seasonality trend recording a peak in July and a trough in January.

Chapter 7 Purpose of Visit

The majority of international visitors to Swaziland travelled for the purpose of holiday/leisure, with 50 percent citing this as their main purpose of travel in 2010. Visiting friends and/or relatives was the next most common reason with 11 percent, followed by business with 10 percent. International visitors travelling for holiday/leisure also accounted for the largest share of visitor nights (37.9 percent). Although those travelling to Swaziland for visiting friends and/or relatives accounted for 11 percent of visitors, their share of visitor nights was a high 25.1 percent as they tend to stay for long periods. Business traveller's share of nights was 23.8 percent.

Figure 29: Percentage of Visitors Arrivals by Main Reason for Visit, 2008-2010



Holiday/leisure visitors

The annual number of international visitors and nights spent in Swaziland for holiday/leisure recorded a relative increase between 2009 and 2010. Over this period there was 0.4 percent growth in the number of holiday visitors to 652,600 while nights spent in Swaziland for holiday/leisure decreased by 5.5 percent to 2.1 nights. The average length of stay for holiday visits has steadily increased over the years from 1.6 nights in 2005 to 2.0 nights in December 2010.

Visiting Friends and Relatives

During the year under review there was a 1.8 percent decline in volumes travelling to visit friends and/or relatives to 140,400 and 8.9 percent increase in nights spent in Swaziland for this purpose to 6.8 nights. The average length of stay for visits to see friends and/or relatives has shown significant growth from 2.8 nights in 2005 to 6.4 nights by December 2010.

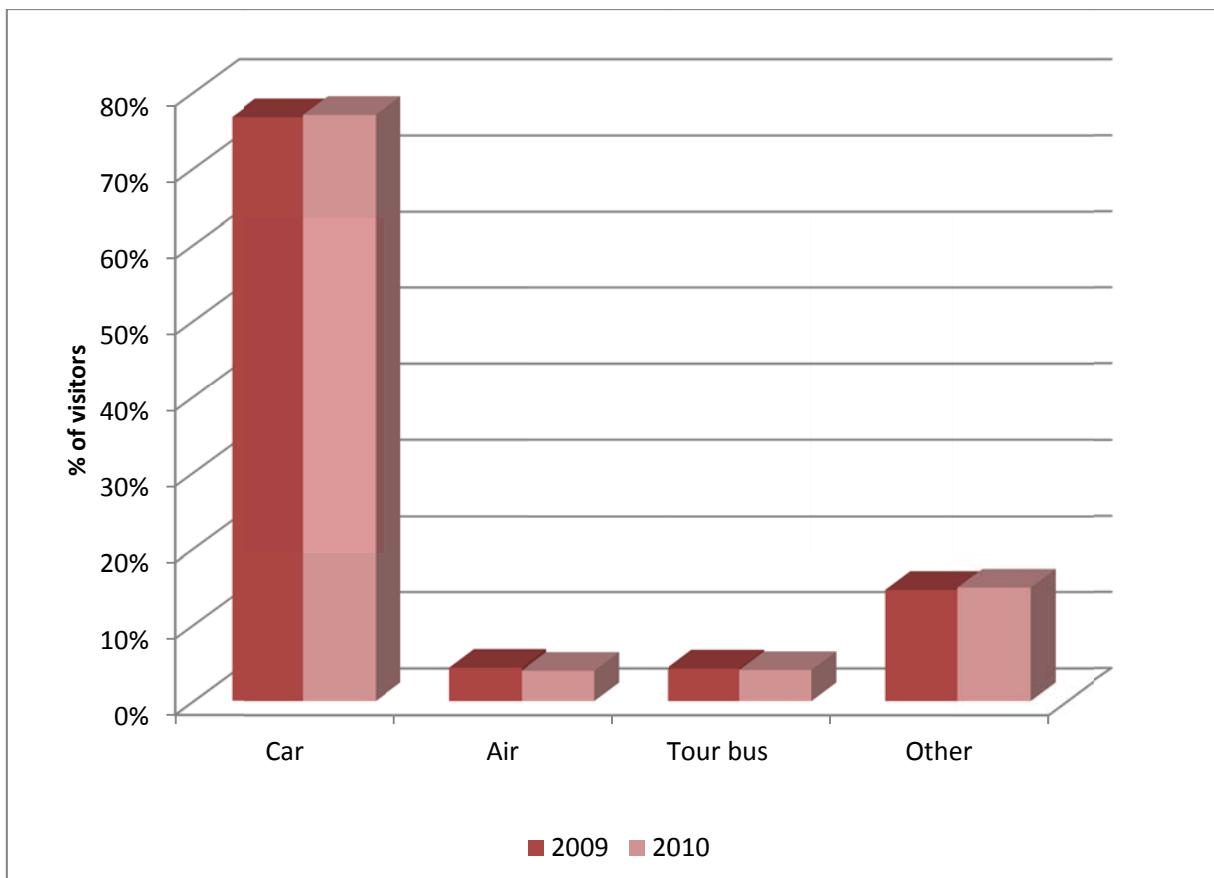
Business

Business travel to Swaziland experienced a fall in 2010. Over this period the number of business visitors declined 1.6 percent to 124,800 whilst visitor nights grew to 13.7 nights. Since 2005 there have been noticeable differences in the trends for visitors and nights, with considerably less variation in the number of visitors travelling for business. In 2005, there were 167,864 business visitors, 1.8 percent less than in the year 2007. In contrast, nights spent in Swaziland for business increased 2.0 percent between 2008 and 2009 and continued to perform well increasing by 7.8 percent to 13.7 nights in the twelve months ending December 2010. The average length of business visits also grew from 3.6 nights in 2009 to 8.9 night in 2010.

Chapter 8 Mode of Transport

During the period in review travel to Swaziland was mainly by road (96.0 percent) while air travel accounted for 4.0 percent. Of the 1,288,932 visitors, use of light vehicles (personal and rented vehicles) was up by a mere 0.3 percent while visitors travelling in tour buses fell by 0.2 percent in 2010 recording 55,044 persons.

Figure 30: Visitor Arrivals by Mode of Transport, 2010

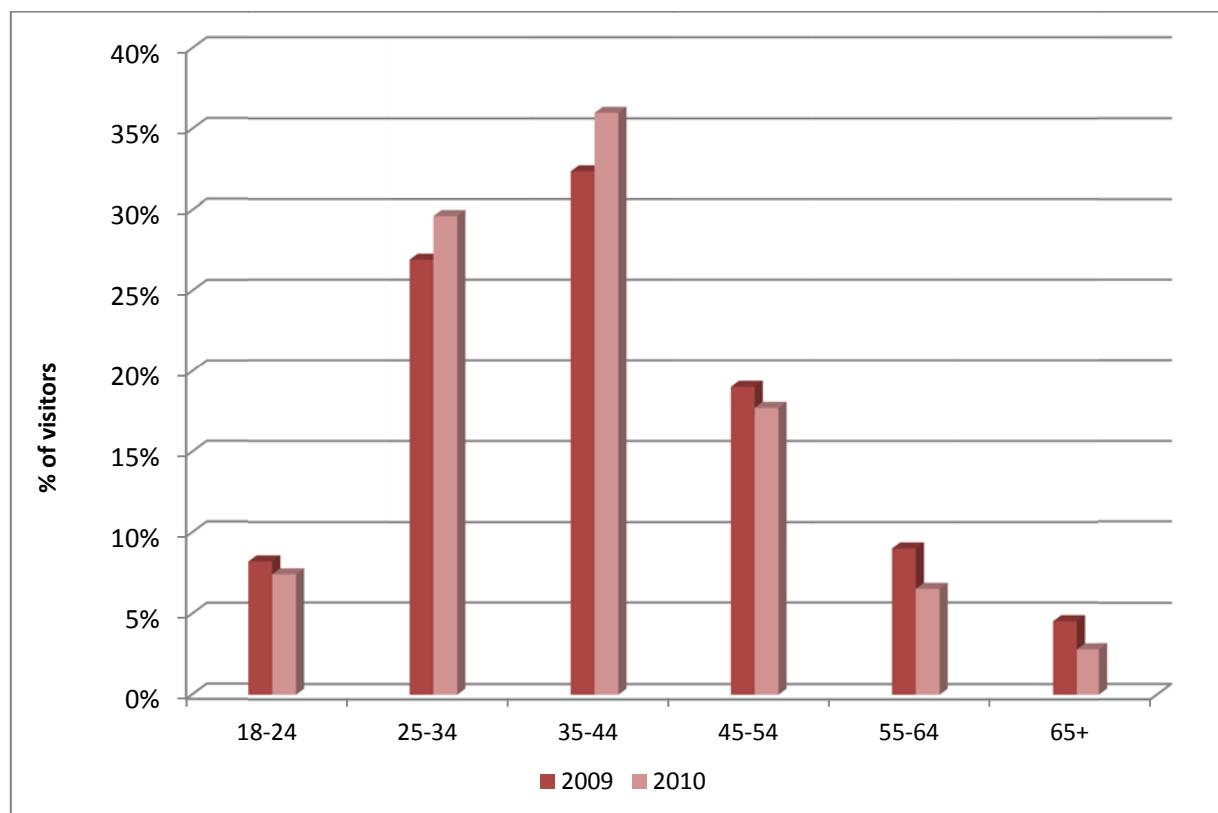


Chapter 9 Age Group

In 2010, the peak age group for all visitors who arrived in Swaziland was 35-44 years (36.0 percent) while those in the 55-64 years and 65+ years declined recording -6.5 percent and -2.8 percent, respectively.

The proportion of people travelling to Swaziland seems to increasing among the middle age groups. The proportion arriving in the 25-34 year age group increased from 26.9 percent in 2009 to 29.6 percent in 2010, while the 35-44 year age group grew by 3.6 percent in 2010 to record 483,312 visitors. Conversely, the proportion of visitors above 55 years decreased by 4.2 percent to account for 124,856 visitors of the 1.3 million arrivals in 2010. The median age of all visitors was 25- 34 years in 2010.

Figure 31: Visitor Arrivals by Age Group, 2010

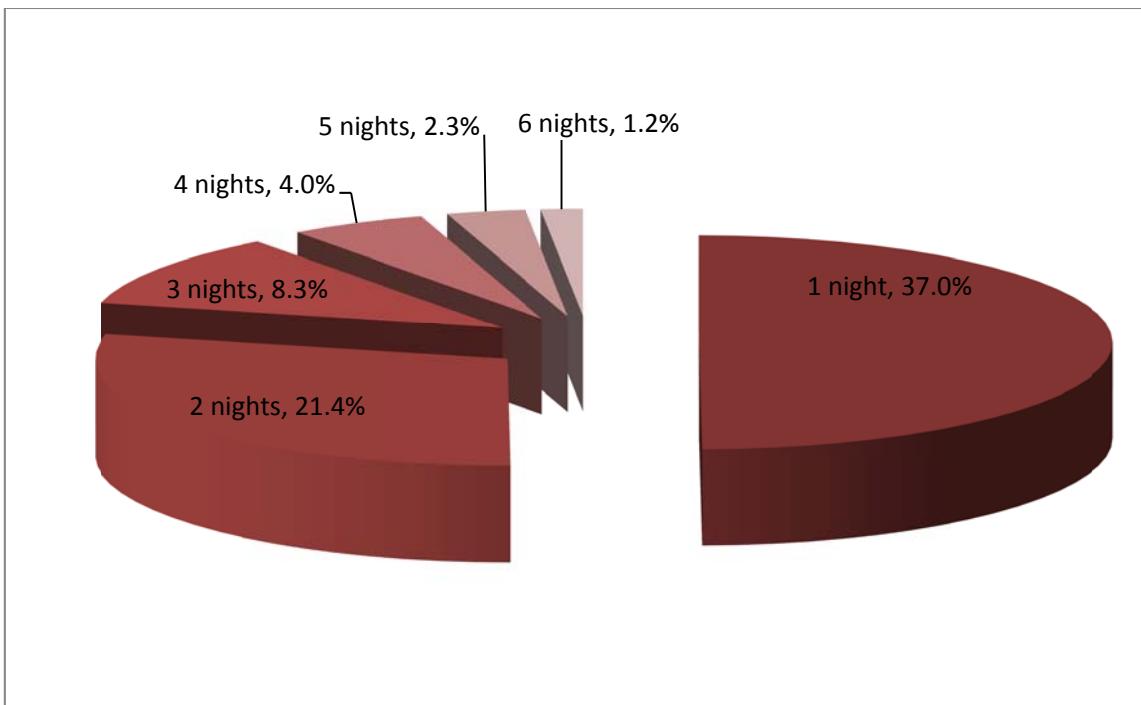


Chapter 10 Length of Stay

On average, international visitors spent 3.2 nights in Swaziland on their trip during 2010. The average length of stay was considerably longer for those travelling for business (8.9 nights) and visiting friends and/or relatives (6.5 nights) than visitors travelling for holiday (2.0 nights).

Trends in international visitor nights to Swaziland have remained somewhat alike between the years 2005 and 2009 where visitor nights were generally stagnant ranging between 1.9 nights and 2.5 nights. Although, a minimal decline of 0.02 percent was recorded in 2009, there was been substantial recovery in 2010 with 3.2 nights spent in Swaziland during the year.

Figure 32: Length of Stay, 2010

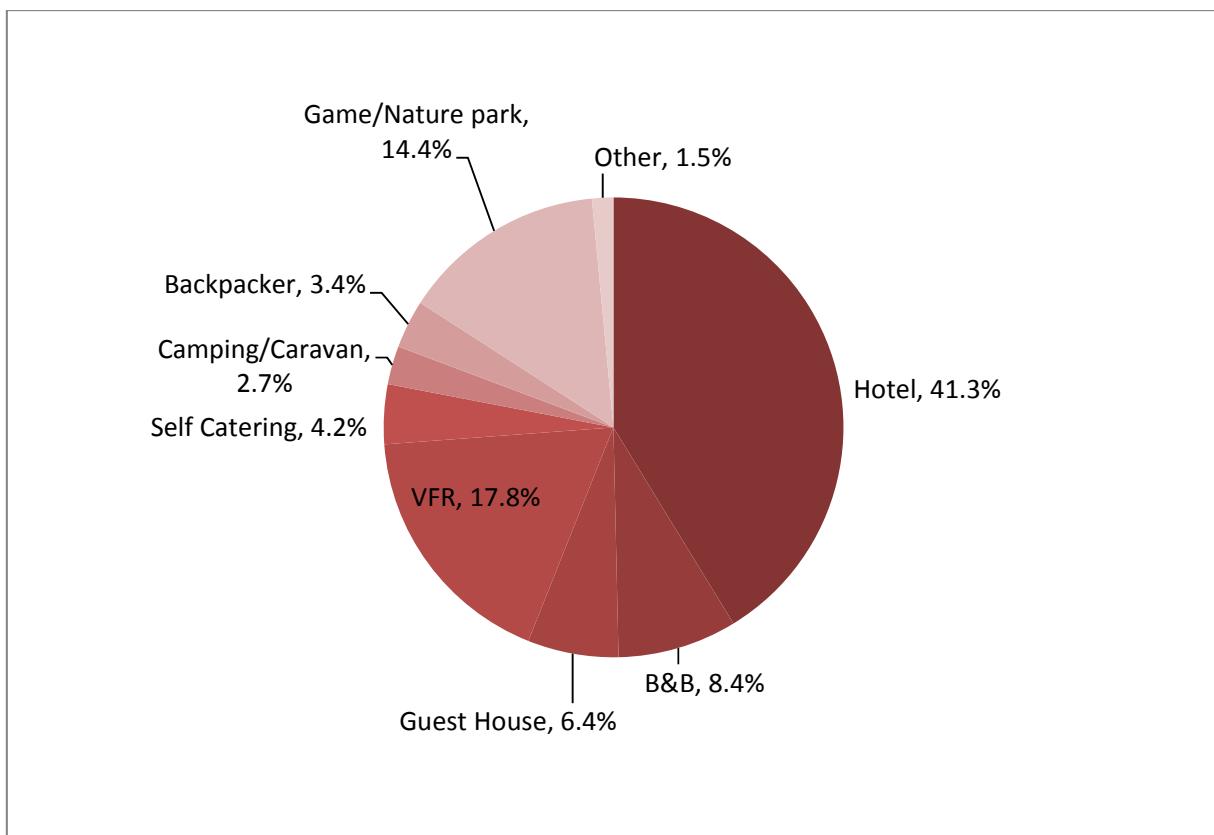


Chapter 11 Accommodation Usage

The most popular choice of accommodation for international visitors in 2010 was hotel, with 41 percent of visitors using this style of accommodation at some stage on their trip. Private accommodation (home of a friend and/or relative) was the next most popular, with 18 percent staying in this type of accommodation, followed by a chalet in game or nature reserve. B&B (8.4 percent), self-catering (4.2 percent) and camping/ caravan (2.7 percent) were amongst other accommodation options used by visitors during the year.

For some accommodation types their share of visitors and visitor nights varied considerably. While 41 percent of visitors stayed in a hotel only 21.8 percent of visitor nights were spent in this type of accommodation. In contrast, 8.4 percent of visitors stayed in a B&B, but this form of accommodation accounted for 3.8 percent of nights spent in Swaziland.

Figure 33: Accommodation Usage by International Visitors

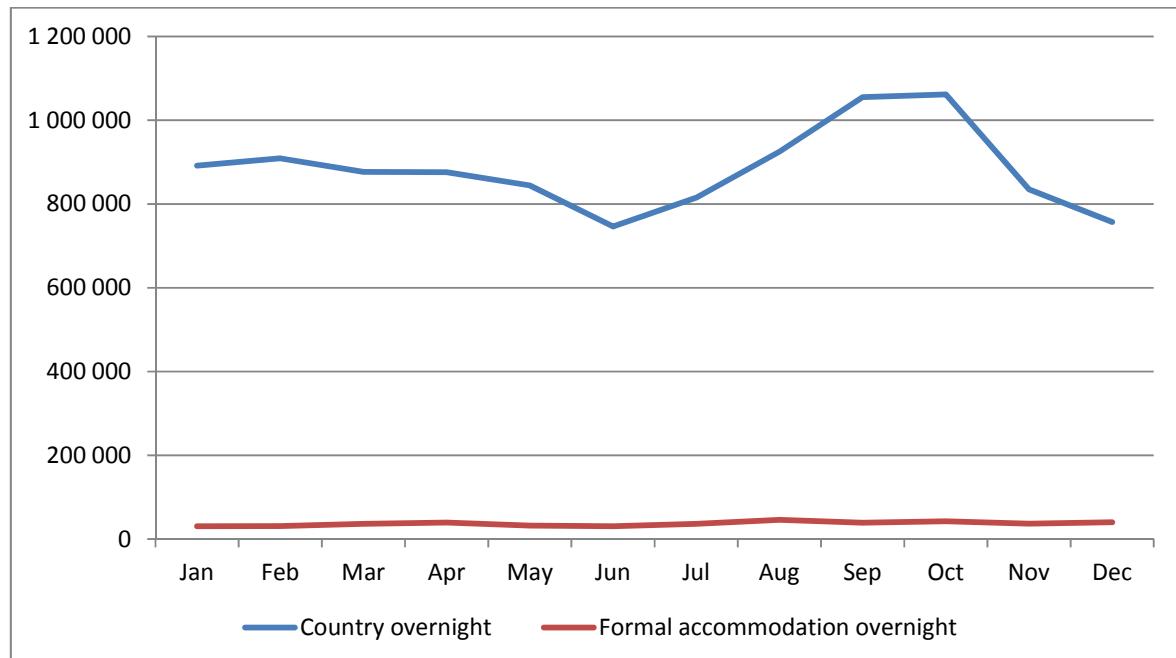


The accommodation sector experienced strong seasonal fluctuations in 2010. Nearly one in three nights spent in accommodation establishments was recorded in August, October and December. The monthly accommodation statistics for 2010 showed a significant seasonal bias for arrivals and number of overnight visitors in accommodation. The number of arrivals and the

number of overnight guests were unevenly spread over the year, both displaying peaks in August and December.

Seasonality in tourism seemed to be much lower from a supply side perspective (i.e. using accommodation statistics) than from the demand side perspective. While the first — by definition — includes only tourism flows into (paid) tourist accommodation, the latter also includes trips where the accommodation was not paid for, such as stays with relatives and friends or stays at owned dwellings (e.g. second residences).

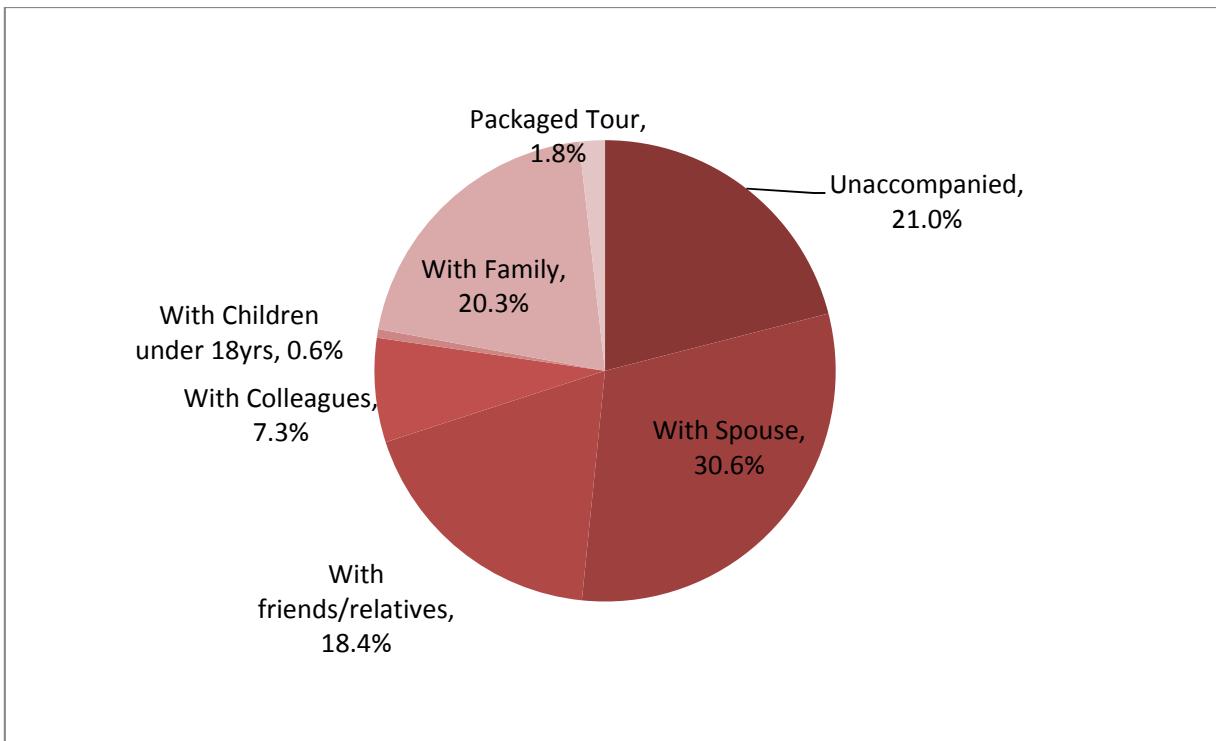
Figure 34: Overnight visitor trend, 2010



Chapter 12 Travel Partnership

Most international visitors to Swaziland travelled as partners (30.6 percent). The next most common types of travel party were those travelling alone (21.0 percent), family groups (20 percent), friends or relatives travelling together (18.4 percent) and colleagues or associates (7.3 percent).

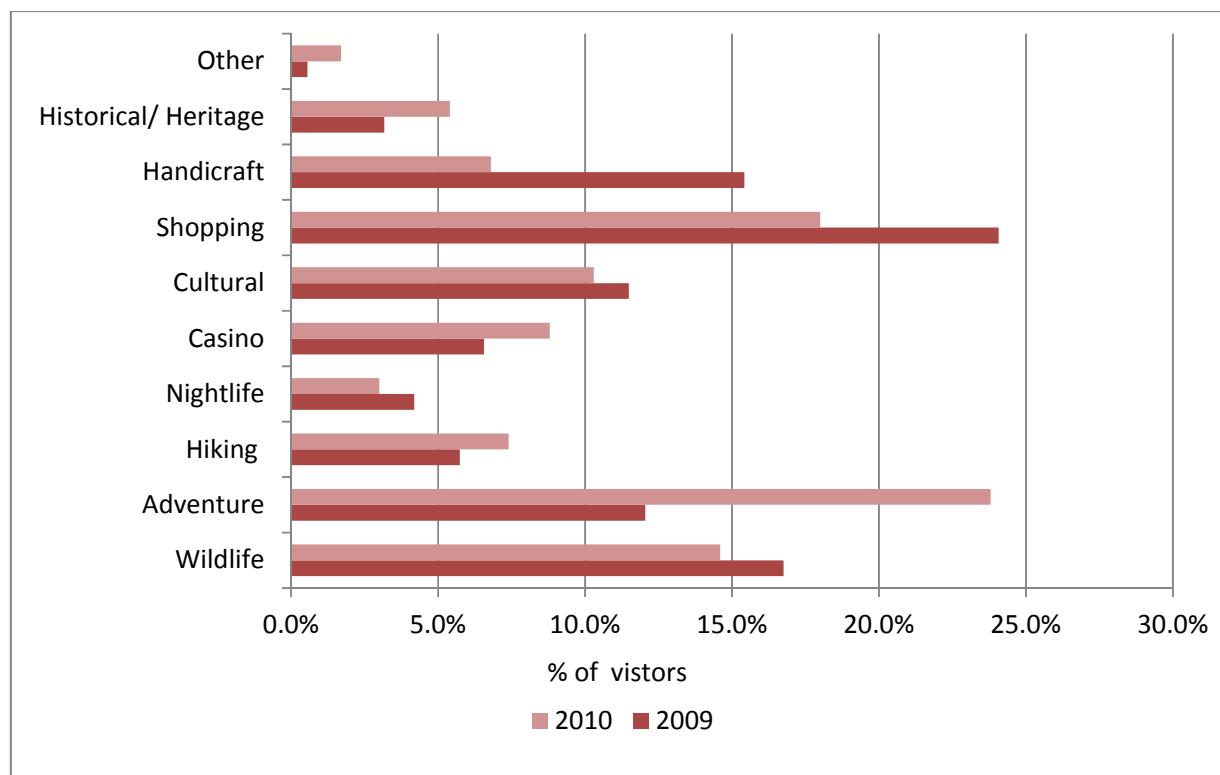
Figure 35: Visitors Arrivals by Travel Partnership, 2010



Chapter 13 Activities Engaged In

Forty five percent of international visitors to Swaziland in 2010 participated in outdoor or nature based activities which included viewing wildlife, adventure and hiking. Social activities such as visiting pubs, clubs or discos were also popular, undertaken by 12 percent of visitors. Twenty four percent of visitors visited local handicraft stalls and shopping while 16 percent were involved in arts, heritage or cultural activities. Sports or active outdoor activities were least common, participated in by 1.7 percent of visitors.

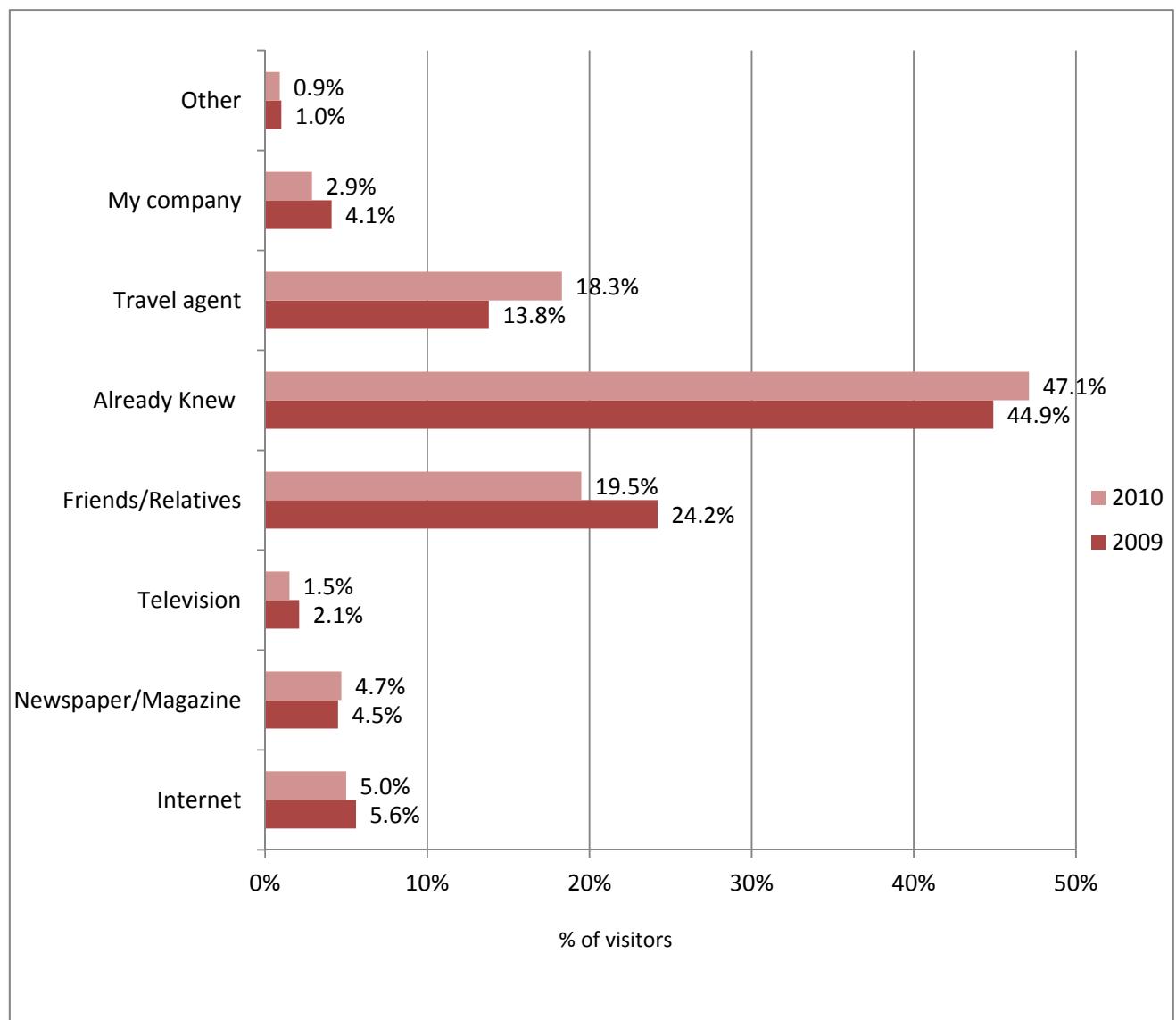
Figure 36: Activities Engaged In, 2009-2010



Chapter 14 Channels of Information

The general trend is that, as travel information sources, word-of-mouth (19.5 percent) and travel agents (18.3 percent) are the most important for travellers to Swaziland. The internet (5.0 percent) and print media (4.7 percent) also had a significant influence.

Figure 37: Main sources of information, 2009-2010



Chapter 15 Trip Satisfaction of Visitors to Swaziland

More international visitors in 2010 were enthusiastic about their visit to Swaziland with over 98 percent indicating they would definitely recommend a visit to the Kingdom. When expressing their highlights, warm and friendly Swazi people (36.4 percent), scenic beauty (28.7 percent), good road infrastructure (5.4 percent), culture and heritage (4.9 percent) and peace and safety (4.0) were top of the list. Although visitor ratings on products and services were good, a decline in the excellent category of satisfaction levels was recorded for border control services (-7.3 percent), customer services in accommodation and dining facilities (-3.9 percent) and availability of information (-4.0 percent).

Figure 38: Visitor Highlights, 2010

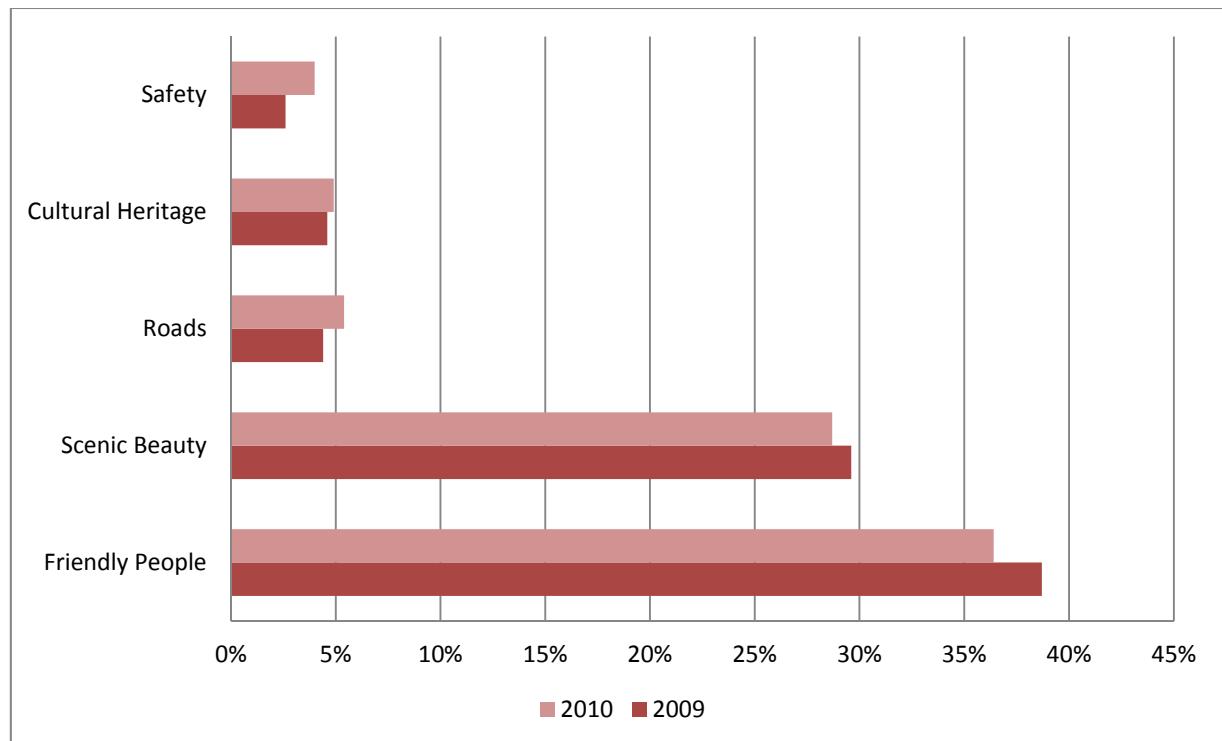
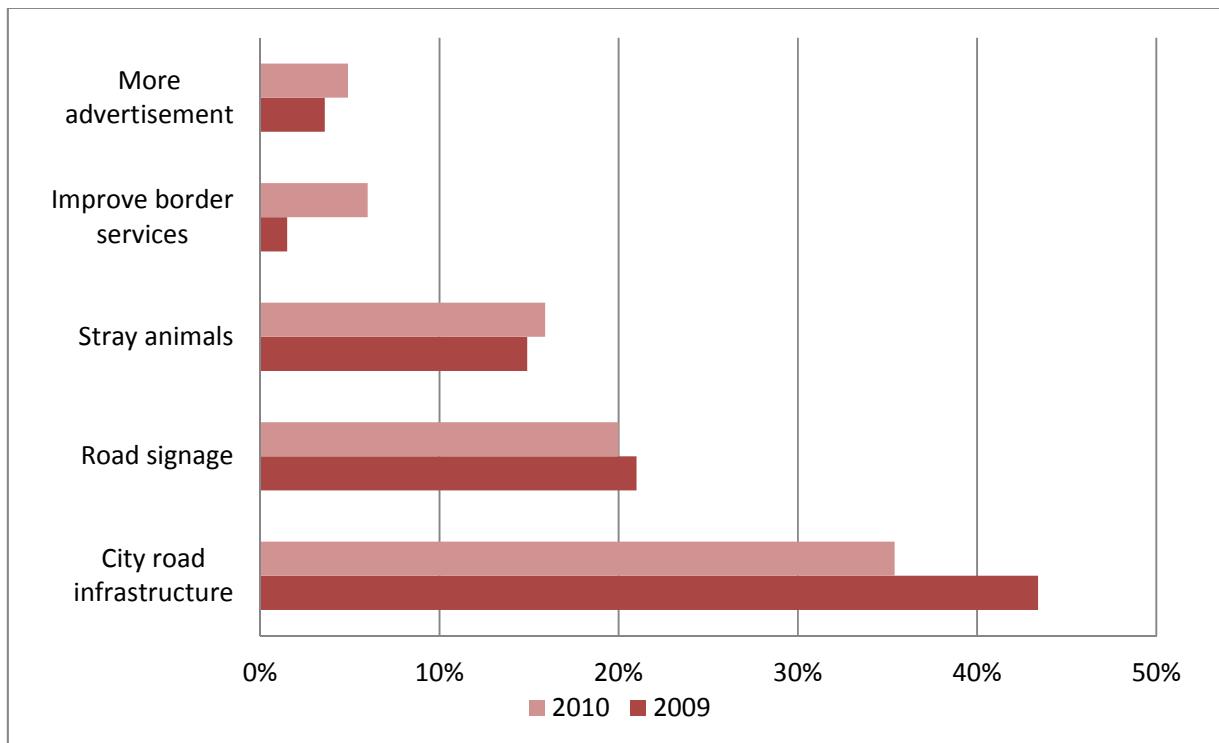


Figure 40: Problems Encountered, 2009-2010



List of Tables

Table 1: International visitor arrivals.....	53
Table 2: Reason for visit.....	54
Table 3: Mode of travel.....	55
Table 4: Accommodation usage.....	56
Table 5: Age group.....	57
Table 6: Travel partnership.....	58
Table 7: Activities engaged in.....	59
Table 8: Repeater rate.....	60
Table 9: Day visitor arrivals.....	61
Table 10: Accommodation data.....	62

Table 1: International Visitor Arrivals

	Table 1: 2010 International visitor arrivals												
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
AFRICA	113 667	84 579	90 211	108 563	93 799	97 822	102 786	106 618	96 568	97 600	93 117	132 723	1 218 053
Botswana	223	180	790	317	301	153	225	452	304	356	217	535	4 053
Kenya	163	164	142	218	363	224	268	210	252	225	219	261	2 709
Lesotho	228	188	1 246	416	374	227	588	228	310	320	391	391	4 906
Malawi	234	218	205	242	225	234	225	279	295	246	254	361	3 017
Mozambique	23 665	20 709	19 191	21 755	18 904	20 353	19 857	19 475	16 603	19 932	18 124	22 766	241 334
Nigeria	200	364	235	182	287	205	204	206	180	200	230	251	2 744
RSA	85 644	59 485	65 154	81 298	69 330	72 906	77 317	81 418	74 427	72 227	69 880	102 108	911 194
Tanzania	326	395	402	402	465	364	456	307	278	445	396	441	4 677
Zambia	482	494	427	567	650	549	590	626	668	537	519	1 019	7 128
Zimbabwe	1 711	1 641	1 681	2 264	1 910	1 758	2 149	2 389	2 096	2 222	1 998	3 124	24 943
Other Africa	791	740	738	901	989	849	909	1 029	1 155	891	890	1 467	11 349
NORTH & SOUTH AMERICA	1 305	1 416	1 498	1 533	1 925	2 171	2 267	1 929	1 301	2 130	1 652	1 373	20 499
Brazil	123	61	64	78	95	239	111	46	63	95	46	66	1 085
Canada	181	313	283	226	269	270	234	253	187	406	323	248	3 192
USA	931	976	1 100	1 151	1 503	1 341	1 815	1 571	1 002	1 566	1 210	975	15 141
Other America	70	66	50	78	59	320	108	59	49	63	74	84	1 081
MIDDLE EAST	442	415	354	451	346	316	404	347	397	315	317	361	4 465
Kuwait	1	8	1	7	2	2	13	7	0	12	3	6	63
Iran	1	4	1	4	4	3	2	4	7	4	2	8	46
Israel	115	79	45	116	21	39	77	52	69	30	36	33	713
Pakistan	314	314	297	305	295	263	292	273	303	263	270	303	3 493
Saudi Arabia	0	2	1	1	0	0	0	0	0	0	0	0	4
United Arab Emirates (UAE)	0	4	0	4	0	0	7	4	6	2	2	0	30
Other Mid East	10	3	8	13	23	9	12	6	12	4	4	9	116
ASIA & AUSTRALIA	1 268	1 097	1 160	1 224	1 117	1 399	1 210	1 454	1 229	1 270	1 073	1 531	15 032
Australia	178	138	141	200	214	529	198	295	310	210	194	267	2 874
China	167	168	110	140	204	143	130	176	146	189	181	225	1 980
India	459	335	399	406	272	282	308	281	307	275	260	387	3 970
Philippines	50	51	34	49	40	26	36	34	22	45	32	79	497
South Korea	115	68	111	94	123	83	137	130	65	53	70	87	1 137
Taiwan	74	100	95	118	87	65	132	132	110	73	94	100	1 182
Other Asia	224	237	270	217	176	271	269	407	270	423	241	387	3 391
EUROPE	7 832	9 495	6 124	6 456	5 357	5 032	5 952	9 212	6 138	9 351	8 338	5 195	84 483
Belgium	237	315	179	395	130	74	315	408	235	375	317	225	3 205
France	1 196	1 201	531	898	604	359	666	1 342	972	2 447	2 040	483	12 737
Germany	987	1 368	1 162	897	627	466	612	1 092	974	1 377	1 102	631	11 294
Italy	249	185	157	197	180	200	180	915	174	304	185	179	3 104
Netherlands	999	1 395	683	726	647	528	991	1 378	826	1 083	847	686	10 788
Norway	85	103	113	65	66	70	67	53	27	111	56	74	891
Portugal	805	660	629	741	719	1 178	620	632	488	594	573	655	8 294
Sweden	248	530	248	143	76	62	57	65	51	144	239	244	2 107
Switzerland	146	155	124	149	84	137	112	131	132	217	217	169	1 773
UK	1 936	2 517	1 727	1 673	1 696	1 333	1 597	2 260	1 753	2 069	1 822	1 347	21 731
Other Europe	945	1 066	570	573	527	625	735	937	506	630	941	503	8 559
GRAND TOTAL	124 514	97 002	99 345	118 227	102 543	106 740	112 620	119 561	105 634	110 666	104 498	141 183	1 342 533

Source: STA in collaboration with the Department of Immigration (Entry/ Departure Cards)

Table 2: Reason for visit

Table 2: 2010						
	REASON FOR VISIT					
	Holiday	VFR	Business	Other	Transit	TOTAL
Africa						
Botswana	26.9%	0.0%	34.6%	30.8%	7.7%	100.0%
Kenya	11.5%	0.0%	15.4%	65.4%	7.7%	100.0%
Lesotho	40.0%	5.0%	25.0%	30.0%	0.0%	100.0%
Malawi	23.5%	11.8%	11.8%	29.4%	23.5%	100.0%
Mozambique	31.3%	22.1%	11.4%	3.7%	31.5%	100.0%
Nigeria	5.9%	0.0%	5.9%	70.6%	17.6%	100.0%
RSA	33.8%	13.1%	13.7%	6.2%	33.2%	100.0%
Tanzania	11.1%	14.8%	7.4%	63.0%	3.7%	100.0%
Zambia	25.7%	17.1%	11.4%	45.7%	0.0%	100.0%
Zimbabwe	44.8%	20.7%	10.3%	6.9%	17.2%	100.0%
America						
Brazil	71.4%	0.0%	7.1%	0.0%	21.4%	100.0%
Canada	76.8%	8.7%	0.0%	1.4%	13.0%	100.0%
USA	81.8%	2.9%	5.8%	3.4%	6.1%	100.0%
Middle East						
Iran	100.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Israel	90.0%	0.0%	0.0%	10.0%	0.0%	100.0%
Pakistan	33.3%	0.0%	33.3%	0.0%	33.3%	100.0%
Asia & Australia						
Australia	86.2%	4.6%	2.3%	0.0%	6.9%	100.0%
China	68.8%	18.8%	12.5%	0.0%	0.0%	100.0%
India	33.3%	16.7%	0.0%	16.7%	33.3%	100.0%
South Korea	50.0%	0.0%	33.3%	0.0%	16.7%	100.0%
Taiwan	50.0%	0.0%	50.0%	0.0%	0.0%	100.0%
Europe						
Belgium	91.3%	1.0%	1.9%	1.9%	3.9%	100.0%
France	91.6%	0.9%	0.7%	0.4%	6.4%	100.0%
Germany	84.6%	1.1%	1.4%	0.7%	12.2%	100.0%
Italy	89.1%	2.5%	1.7%	0.0%	6.7%	100.0%
Netherlands	93.2%	0.7%	0.2%	0.4%	5.5%	100.0%
Norway	85.7%	4.8%	0.0%	4.8%	4.8%	100.0%
Portugal	73.8%	6.8%	1.9%	1.9%	15.5%	100.0%
Sweden	83.9%	0.0%	0.0%	1.6%	14.5%	100.0%
Switzerland	84.3%	2.8%	3.7%	0.0%	9.3%	100.0%
UK	76.2%	5.3%	3.1%	1.8%	13.6%	100.0%

Source: Exit Survey, STA

Table 3: Mode of Travel

Table 3: 2010					
	MODE OF TRAVEL				
	Car	Air	Tour Bus	Other	TOTAL
Africa					
Botswana	46.2%	53.8%	0.0%	0.0%	100.0%
Kenya	14.8%	77.8%	0.0%	7.4%	100.0%
Lesotho	55.0%	35.0%	5.0%	5.0%	100.0%
Malawi	37.5%	31.3%	6.3%	25.0%	100.0%
Mozambique	59.0%	0.2%	0.4%	40.4%	100.0%
Nigeria	40.0%	46.7%	0.0%	13.3%	100.0%
RSA	81.0%	4.0%	1.9%	13.2%	100.0%
Tanzania	7.4%	74.1%	0.0%	18.5%	100.0%
Zambia	25.7%	60.0%	0.0%	14.3%	100.0%
Zimbabwe	62.1%	3.4%	5.2%	29.3%	100.0%
America					
Brazil	82.1%	0.0%	3.6%	14.3%	100.0%
Canada	75.7%	10.0%	5.7%	8.6%	100.0%
USA	71.5%	7.7%	10.0%	10.8%	100.0%
Middle East					
Iran	100.0%	0.0%	0.0%	0.0%	100.0%
Israel	70.0%	0.0%	10.0%	20.0%	100.0%
Pakistan	66.7%	0.0%	0.0%	33.3%	100.0%
Asia & Australia					
Australia	76.7%	2.3%	8.1%	12.8%	100.0%
China	86.7%	6.7%	0.0%	6.7%	100.0%
India	71.4%	14.3%	0.0%	14.3%	100.0%
South Korea	33.3%	0.0%	0.0%	66.7%	100.0%
Taiwan	100.0%	0.0%	0.0%	0.0%	100.0%
Europe					
Belgium	86.1%	1.0%	7.9%	5.0%	100.0%
France	80.7%	1.4%	15.5%	2.3%	100.0%
Germany	87.8%	1.1%	7.7%	3.4%	100.0%
Italy	89.1%	4.2%	3.4%	3.4%	100.0%
Netherlands	84.3%	2.0%	9.7%	4.0%	100.0%
Norway	76.2%	0.0%	4.8%	19.0%	100.0%
Portugal	88.3%	2.9%	1.9%	6.8%	100.0%
Sweden	70.5%	0.0%	19.7%	9.8%	100.0%
Switzerland	83.6%	5.5%	6.4%	4.5%	100.0%
UK	78.2%	3.1%	12.2%	6.5%	100.0%

Source: Exit Survey, STA

Table 4: Accommodation Usage

Table 4: 2010										
	ACCOMMODATION USAGE									
	Hotel	B&B	Guest House	VFR	Self Catering	Camping/ Caravan	Backpacker	Game/ Nature park	Other	TOTAL
Africa										
Botswana	26.1%	4.3%	21.7%	4.3%	34.8%	0.0%	0.0%	0.0%	8.7%	100.0%
Kenya	8.0%	4.0%	8.0%	4.0%	72.0%	0.0%	0.0%	0.0%	4.0%	100.0%
Lesotho	16.7%	16.7%	0.0%	5.6%	16.7%	0.0%	0.0%	11.1%	33.3%	100.0%
Malawi	23.1%	0.0%	23.1%	15.4%	23.1%	0.0%	0.0%	7.7%	7.7%	100.0%
Mozambique	24.0%	7.6%	6.1%	40.6%	8.9%	1.6%	1.5%	7.1%	2.6%	100.0%
Nigeria	7.7%	7.7%	38.5%	0.0%	38.5%	0.0%	0.0%	0.0%	7.7%	100.0%
RSA	41.6%	8.4%	6.4%	27.2%	3.0%	2.8%	1.4%	7.5%	1.6%	100.0%
Tanzania	23.1%	0.0%	7.7%	11.5%	38.5%	0.0%	0.0%	0.0%	19.2%	100.0%
Zambia	17.6%	2.9%	14.7%	17.6%	35.3%	0.0%	0.0%	2.9%	8.8%	100.0%
Zimbabwe	27.3%	3.0%	3.0%	39.4%	6.1%	3.0%	0.0%	15.2%	3.0%	100.0%
America										
Brazil	57.1%	4.8%	9.5%	0.0%	0.0%	4.8%	9.5%	14.3%	0.0%	100.0%
Canada	36.7%	13.3%	3.3%	13.3%	1.7%	3.3%	8.3%	18.3%	1.7%	100.0%
USA	37.9%	7.2%	5.5%	5.8%	2.6%	4.3%	10.7%	24.9%	1.2%	100.0%
Middle East										
Iran	66.7%	0.0%	0.0%	33.3%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Israel	44.4%	11.1%	0.0%	0.0%	0.0%	0.0%	33.3%	11.1%	0.0%	100.0%
Pakistan	0.0%	25.0%	0.0%	75.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Asia & Australia										
Australia	40.0%	7.5%	7.5%	8.8%	0.0%	2.5%	11.3%	22.5%	0.0%	100.0%
China	60.0%	20.0%	6.7%	13.3%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%
India	33.3%	0.0%	0.0%	33.3%	0.0%	0.0%	0.0%	0.0%	33.3%	100.0%
South Korea	25.0%	25.0%	0.0%	0.0%	0.0%	0.0%	25.0%	0.0%	25.0%	100.0%
Taiwan	0.0%	0.0%	0.0%	0.0%	50.0%	0.0%	0.0%	50.0%	0.0%	100.0%
Europe										
Belgium	56.3%	7.3%	6.3%	1.0%	0.0%	1.0%	5.2%	22.9%	0.0%	100.0%
France	52.2%	10.3%	4.9%	1.6%	2.2%	1.4%	4.5%	22.9%	0.0%	100.0%
Germany	45.0%	11.5%	6.7%	1.4%	2.7%	4.2%	3.7%	24.4%	0.3%	100.0%
Italy	63.6%	8.4%	8.4%	1.9%	0.0%	0.9%	1.9%	15.0%	0.0%	100.0%
Netherlands	43.7%	7.2%	5.0%	0.6%	2.4%	3.8%	7.0%	29.8%	0.4%	100.0%
Norway	42.1%	10.5%	5.3%	5.3%	0.0%	0.0%	15.8%	21.1%	0.0%	100.0%
Portugal	54.3%	8.6%	7.4%	7.4%	0.0%	6.2%	0.0%	13.6%	2.5%	100.0%
Sweden	40.8%	10.2%	4.1%	2.0%	0.0%	8.2%	16.3%	16.3%	2.0%	100.0%
Switzerland	54.6%	10.3%	6.2%	1.0%	1.0%	0.0%	3.1%	23.7%	0.0%	100.0%
UK	41.0%	8.4%	6.8%	8.7%	1.6%	1.6%	9.5%	22.0%	0.3%	100.0%

Source: Exit Survey, STA

Table 5: Age group

Country	AGE GROUP						TOTAL
	18-24	25-34	35-44	45-54	55-64	65+	
Africa							
Botswana	11.5%	46.2%	30.8%	11.5%	0.0%	0.0%	100.0%
Kenya	0.0%	50.0%	46.4%	3.6%	0.0%	0.0%	100.0%
Lesotho	21.1%	36.8%	42.1%	0.0%	0.0%	0.0%	100.0%
Malawi	5.9%	17.6%	58.8%	17.6%	0.0%	0.0%	100.0%
Mozambique	8.8%	35.7%	34.4%	16.4%	3.7%	1.0%	100.0%
Nigeria	6.3%	43.8%	31.3%	18.8%	0.0%	0.0%	100.0%
RSA	7.0%	27.1%	37.3%	19.9%	6.4%	2.5%	100.0%
Tanzania	4.0%	44.0%	40.0%	12.0%	0.0%	0.0%	100.0%
Zambia	5.7%	48.6%	37.1%	5.7%	2.9%	0.0%	100.0%
Zimbabwe	3.4%	32.8%	41.4%	19.0%	3.4%	0.0%	100.0%
America							
Brazil	3.7%	33.3%	37.0%	14.8%	0.0%	11.1%	100.0%
Canada	13.2%	32.4%	33.8%	10.3%	10.3%	0.0%	100.0%
USA	11.6%	34.2%	27.8%	13.2%	7.0%	6.2%	100.0%
Middle East							
Iran	33.3%	33.3%	33.3%	0.0%	0.0%	0.0%	100.0%
Israel	40.0%	40.0%	10.0%	10.0%	0.0%	0.0%	100.0%
Pakistan	16.7%	33.3%	33.3%	16.7%	0.0%	0.0%	100.0%
Asia & Australia							
Australia	8.2%	40.0%	29.4%	18.8%	3.5%	0.0%	100.0%
China	6.7%	13.3%	66.7%	13.3%	0.0%	0.0%	100.0%
India	0.0%	50.0%	50.0%	0.0%	0.0%	0.0%	100.0%
South Korea	0.0%	16.7%	33.3%	50.0%	0.0%	0.0%	100.0%
Taiwan	0.0%	50.0%	50.0%	0.0%	0.0%	0.0%	100.0%
Europe							
Belgium	4.1%	38.8%	26.5%	18.4%	9.2%	3.1%	100.0%
France	5.7%	27.7%	37.6%	15.9%	9.5%	3.6%	100.0%
Germany	7.1%	28.3%	38.6%	14.0%	8.3%	3.7%	100.0%
Italy	5.2%	33.6%	33.6%	19.0%	6.0%	2.6%	100.0%
Netherlands	6.8%	21.9%	33.8%	17.0%	13.4%	7.0%	100.0%
Norway	23.8%	23.8%	33.3%	14.3%	0.0%	4.8%	100.0%
Portugal	4.9%	30.1%	35.0%	19.4%	9.7%	1.0%	100.0%
Sweden	10.3%	39.7%	20.7%	17.2%	6.9%	5.2%	100.0%
Switzerland	6.5%	33.3%	31.5%	17.6%	7.4%	3.7%	100.0%
UK	9.3%	29.0%	29.4%	13.6%	11.1%	7.7%	100.0%

Source: Exit Survey, STA

Table 6: Travel Partnership

Table 6: 2010								
	TRAVEL PARTNERSHIP							
	Alone	With spouse/partner	With friends/relatives	With colleagues	With children under 18yrs	With family	Packaged tour	Total
Africa								
Botswana	57.7%	15.4%	15.4%	11.5%	0.0%	0.0%	0.0%	100.0%
Kenya	67.9%	3.6%	10.7%	14.3%	0.0%	3.6%	0.0%	100.0%
Lesotho	10.0%	10.0%	25.0%	55.0%	0.0%	0.0%	0.0%	100.0%
Malawi	47.1%	17.6%	11.8%	11.8%	0.0%	11.8%	0.0%	100.0%
Mozambique	35.9%	16.7%	16.9%	5.3%	1.3%	23.9%	0.1%	100.0%
Nigeria	52.9%	17.6%	5.9%	23.5%	0.0%	0.0%	0.0%	100.0%
RSA	23.9%	24.9%	17.4%	10.7%	0.8%	20.8%	1.5%	100.0%
Tanzania	85.2%	7.4%	3.7%	3.7%	0.0%	0.0%	0.0%	100.0%
Zambia	62.9%	2.9%	14.3%	8.6%	0.0%	11.4%	0.0%	100.0%
Zimbabwe	27.6%	17.2%	25.9%	3.4%	0.0%	20.7%	5.2%	100.0%
America								
Brazil	10.7%	32.1%	32.1%	10.7%	0.0%	14.3%	0.0%	100.0%
Canada	10.0%	40.0%	24.3%	1.4%	0.0%	20.0%	4.3%	100.0%
USA	12.0%	36.4%	23.0%	7.1%	0.0%	16.8%	4.7%	100.0%
Middle East								
Iran	33.3%	33.3%	33.3%	0.0%	0.0%	0.0%	0.0%	100.0%
Israel	20.0%	50.0%	30.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Pakistan	33.3%	0.0%	33.3%	0.0%	0.0%	33.3%	0.0%	100.0%
Asia & Australia								
Australia	8.0%	43.7%	23.0%	1.1%	1.1%	21.8%	1.1%	100.0%
China	31.3%	50.0%	6.3%	6.3%	0.0%	6.3%	0.0%	100.0%
India	28.6%	14.3%	14.3%	14.3%	0.0%	28.6%	0.0%	100.0%
South Korea	0.0%	0.0%	33.3%	50.0%	0.0%	0.0%	16.7%	100.0%
Taiwan	50.0%	0.0%	50.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Europe								
Belgium	3.9%	38.2%	18.6%	3.9%	0.0%	29.4%	5.9%	100.0%
France	5.9%	53.9%	16.6%	1.4%	0.2%	19.3%	2.7%	100.0%
Germany	7.1%	51.0%	21.4%	1.1%	0.1%	16.6%	2.6%	100.0%
Italy	2.6%	51.3%	25.6%	0.9%	0.0%	18.8%	0.9%	100.0%
Netherlands	3.3%	57.5%	19.2%	0.4%	0.0%	16.1%	3.6%	100.0%
Norway	4.8%	23.8%	23.8%	9.5%	0.0%	38.1%	0.0%	100.0%
Portugal	9.7%	39.8%	20.4%	3.9%	0.0%	24.3%	1.9%	100.0%
Sweden	3.2%	32.3%	25.8%	6.5%	0.0%	21.0%	11.3%	100.0%
Switzerland	7.2%	51.4%	21.6%	1.8%	0.0%	14.4%	3.6%	100.0%
UK	9.8%	46.1%	20.2%	3.1%	0.2%	17.3%	3.3%	100.0%

Source: Exit Survey, STA

Table 7: Activities engaged in

	Table 7: 2010										
	ACTIVITIES										
	Wildlife	Adventure	Hiking	Nightlife	Casino	Cultural	Shopping	Handicraft	Historical/ Heritage	Other	TOTAL
Africa											
Botswana	5.6%	9.3%	0.0%	1.9%	1.9%	25.9%	33.3%	11.1%	11.1%	0.0%	100.0%
Kenya	6.5%	3.2%	3.2%	4.8%	0.0%	29.0%	32.3%	3.2%	16.1%	1.6%	100.0%
Lesotho	13.2%	21.1%	5.3%	5.3%	5.3%	18.4%	15.8%	7.9%	7.9%	0.0%	100.0%
Malawi	8.0%	12.0%	8.0%	0.0%	4.0%	24.0%	24.0%	0.0%	20.0%	0.0%	100.0%
Mozambique	12.6%	25.2%	4.7%	3.3%	6.4%	5.8%	33.5%	4.5%	2.7%	1.3%	100.0%
Nigeria	10.7%	7.1%	3.6%	7.1%	3.6%	21.4%	25.0%	7.1%	14.3%	0.0%	100.0%
RSA	10.0%	30.0%	5.7%	4.1%	11.9%	7.9%	19.3%	4.8%	3.7%	2.5%	100.0%
Tanzania	3.9%	3.9%	2.0%	7.8%	0.0%	29.4%	35.3%	5.9%	11.8%	0.0%	100.0%
Zambia	7.9%	10.5%	1.3%	1.3%	1.3%	27.6%	32.9%	5.3%	10.5%	1.3%	100.0%
Zimbabwe	12.3%	18.5%	7.7%	0.0%	6.2%	7.7%	35.4%	4.6%	4.6%	3.1%	100.0%
America											
Brazil	16.9%	18.3%	9.9%	2.8%	7.0%	12.7%	15.5%	9.9%	5.6%	1.4%	100.0%
Canada	16.1%	21.7%	13.0%	2.5%	6.2%	9.9%	17.4%	7.5%	5.0%	0.6%	100.0%
USA	20.9%	18.1%	10.9%	2.7%	5.6%	12.6%	13.0%	6.2%	8.4%	1.6%	100.0%
Middle East											
Iran	7.7%	23.1%	7.7%	7.7%	15.4%	7.7%	23.1%	0.0%	7.7%	0.0%	100.0%
Israel	14.3%	28.6%	14.3%	7.1%	14.3%	7.1%	0.0%	14.3%	0.0%	0.0%	100.0%
Pakistan	0.0%	20.0%	0.0%	0.0%	40.0%	0.0%	40.0%	0.0%	0.0%	0.0%	100.0%
Asia & Australia											
Australia	17.2%	21.2%	10.8%	2.5%	6.9%	13.3%	12.3%	5.4%	7.9%	2.5%	100.0%
China	16.7%	10.0%	10.0%	6.7%	20.0%	16.7%	6.7%	0.0%	6.7%	6.7%	100.0%
India	9.1%	18.2%	9.1%	9.1%	9.1%	9.1%	27.3%	0.0%	9.1%	0.0%	100.0%
South Korea	15.4%	0.0%	7.7%	0.0%	7.7%	15.4%	15.4%	7.7%	23.1%	7.7%	100.0%
Taiwan	50.0%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Europe											
Belgium	19.6%	26.5%	7.4%	1.6%	14.3%	11.1%	11.1%	2.6%	4.2%	1.6%	100.0%
France	17.5%	17.3%	9.1%	1.7%	5.9%	11.5%	17.5%	12.1%	6.5%	0.9%	100.0%
Germany	18.5%	21.4%	9.6%	1.9%	6.8%	12.0%	12.3%	9.7%	6.7%	1.3%	100.0%
Italy	15.1%	27.7%	8.1%	3.3%	12.2%	7.0%	15.1%	7.7%	3.7%	0.0%	100.0%
Netherlands	22.3%	9.5%	10.7%	1.4%	3.7%	17.8%	10.3%	12.1%	9.6%	2.7%	100.0%
Norway	15.4%	17.9%	10.3%	2.6%	7.7%	5.1%	17.9%	10.3%	7.7%	5.1%	100.0%
Portugal	17.7%	22.7%	6.4%	3.4%	9.4%	9.4%	19.7%	5.4%	5.4%	0.5%	100.0%
Sweden	21.9%	17.8%	9.6%	1.4%	5.5%	13.7%	13.7%	8.2%	6.8%	1.4%	100.0%
Switzerland	16.5%	16.5%	11.8%	0.9%	8.5%	12.7%	13.2%	10.4%	6.1%	3.3%	100.0%
UK	19.1%	20.6%	8.6%	2.3%	7.1%	12.3%	13.7%	7.8%	7.3%	1.2%	100.0%

Source: Exit Survey, STA

Table 8: Repeater rate

Table 8: 2010								
	REPEATER RATE							
	First visit	Once a year	Twice a year	3-4 times a year	Frequently (>=5 times a year)	Weekly	Monthly	TOTAL
Africa								
Botswana	73.1%	3.8%	7.7%	7.7%	3.8%	0.0%	3.8%	100.0%
Kenya	88.5%	7.7%	3.8%	0.0%	0.0%	0.0%	0.0%	100.0%
Lesotho	60.0%	15.0%	10.0%	10.0%	5.0%	0.0%	0.0%	100.0%
Malawi	56.3%	0.0%	25.0%	6.3%	6.3%	0.0%	6.3%	100.0%
Mozambique	10.5%	5.6%	16.3%	22.5%	35.3%	2.1%	7.6%	100.0%
Nigeria	64.7%	11.8%	11.8%	5.9%	5.9%	0.0%	0.0%	100.0%
RSA	14.1%	9.0%	21.0%	18.8%	26.9%	3.7%	6.4%	100.0%
Tanzania	80.8%	0.0%	3.8%	7.7%	7.7%	0.0%	0.0%	100.0%
Zambia	68.6%	0.0%	11.4%	14.3%	5.7%	0.0%	0.0%	100.0%
Zimbabwe	21.8%	7.3%	14.5%	9.1%	45.5%	0.0%	1.8%	100.0%
America								
Brazil	75.0%	0.0%	17.9%	0.0%	7.1%	0.0%	0.0%	100.0%
Canada	83.8%	4.4%	8.8%	1.5%	1.5%	0.0%	0.0%	100.0%
USA	83.6%	3.8%	8.3%	2.1%	1.3%	0.0%	0.8%	100.0%
Middle East								
Iran	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Israel	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Pakistan	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Asia & Australia								
Australia	89.5%	2.3%	7.0%	1.2%	0.0%	0.0%	0.0%	100.0%
China	43.8%	6.3%	37.5%	6.3%	0.0%	6.3%	0.0%	100.0%
India	57.1%	0.0%	14.3%	14.3%	14.3%	0.0%	0.0%	100.0%
South Korea	83.3%	0.0%	0.0%	16.7%	0.0%	0.0%	0.0%	100.0%
Taiwan	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Europe								
Belgium	88.2%	1.0%	6.9%	1.0%	2.9%	0.0%	0.0%	100.0%
France	92.5%	1.5%	3.5%	1.3%	0.5%	0.2%	0.5%	100.0%
Germany	91.4%	2.5%	4.6%	0.6%	0.6%	0.0%	0.4%	100.0%
Italy	93.2%	3.4%	0.9%	2.6%	0.0%	0.0%	0.0%	100.0%
Netherlands	90.2%	3.9%	4.4%	0.7%	0.4%	0.2%	0.2%	100.0%
Norway	90.5%	0.0%	4.8%	0.0%	4.8%	0.0%	0.0%	100.0%
Portugal	76.2%	1.0%	11.9%	5.9%	5.0%	0.0%	0.0%	100.0%
Sweden	86.9%	1.6%	9.8%	1.6%	0.0%	0.0%	0.0%	100.0%
Switzerland	82.1%	2.8%	11.3%	3.8%	0.0%	0.0%	0.0%	100.0%
UK	79.1%	8.1%	7.2%	3.8%	1.8%	0.0%	0.0%	100.0%

Source: Exit Survey, STA

Table 9: Day Visitor Arrivals

Table 9: 2010 Day Visitor Arrivals													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Swd	2579	1883	2386	2697	2488	3236	10000	22250	8133	6559	3567	7741	73 519
RSA	458	393	526	849	450	883	621	744	638	531	526	1478	8 097
Moz	154	120	114	122	129	163	137	149	64	156	43	198	1 549
Bots	16	10	50	4	3	13	4	18	0	33	17	35	203
Lesotho	0	5	60	10	5	0	237	3	0	3	28	31	382
Other Africa	24	25	50	16	29	66	198	26	34	77	16	14	575
Germany	88	84	125	79	57	45	72	211	92	134	156	92	1 235
Netherlands	91	67	118	81	71	53	177	251	70	132	112	128	1 351
UK	68	68	59	161	67	63	143	152	79	73	73	61	1 067
France	139	98	361	55	91	69	104	199	105	179	115	79	1 594
Portugal	10	10	13	19	6	27	3	17	30	16	11	16	178
Switzerland	14	5	46	23	10	7	18	79	38	21	18	41	320
Other Europe	89	156	147	114	85	104	202	346	199	150	96	75	1 763
USA	115	48	111	76	137	142	379	127	121	74	55	66	1 451
Canada	5	8	72	15	47	24	127	96	15	8	4	11	432
Other America	20	23	23	10	20	33	39	61	14	73	10	7	333
China	15	19	3	7	4	19	3	36	21	4	10	7	148
India	12	0	25	0	11	6	0	3	18	0	10	7	92
Taiwan	50	1	7	5	37	21	35	56	6	1	0	0	219
Other Asia	16	0	23	16	31	32	17	42	38	9	6	7	237
Australia	27	20	9	21	39	82	20	26	35	5	6	16	306
New Zealand	5	1	2	0	3	16	0	0	4	8	8	7	54
Other Australasia	2	2	15	5	4	14	0	10	0	4	16	4	76
	3 997	3 046	4 345	4 385	3 824	5 118	12 536	24 902	9 754	8 250	4 903	10 121	95 181
Distance by Swazis													
Less than 10km	366	476	306	375	291	431	475	1549	787	491	792	617	6 956
10- 30 km	836	666	825	886	744	926	1692	3703	1709	1461	901	3102	17 451
30-50 km	332	248	366	424	471	564	2195	2855	1873	998	663	1300	12 289
50-70km	304	175	149	256	163	347	1070	2339	1071	980	259	739	7 852
70-90km	216	143	113	182	291	346	943	2921	1176	621	462	586	8 000
Over 90km	525	175	627	574	528	622	3625	8883	1517	2008	490	1397	20 971
	2 579	1 883	2 386	2 697	2 488	3 236	10 000	22 250	8 133	6 559	3 567	7 741	73 519
Reason for visit													
Recreation	3428	2396	3238	3131	3168	3621	3808	4113	3027	2909	2765	9041	44 645
Educational	318	316	1011	1090	443	1226	8594	20294	6005	5129	1906	342	46 674
Research	69	171	13	32	99	63	74	130	479	60	62	77	1 329
Other	182	163	83	132	114	208	60	365	243	152	170	661	2 533
	3 997	3 046	4 345	4 385	3 824	5 118	12 536	24 902	9 754	8 250	4 903	10 121	95 181
Mode of travel													
Personal car	3331	2472	2706	2921	2943	3604	3551	3827	2817	2663	2320	8226	41 381
Tour bus	341	166	709	678	438	273	2329	8116	2514	2609	1522	1655	21 350
School bus	177	108	625	686	376	1061	6585	12910	4353	2890	935	73	30 779
Other	148	300	305	100	67	180	71	49	70	88	126	167	1 671
	3 997	3 046	4 345	4 385	3 824	5 118	12 536	24 902	9 754	8 250	4 903	10 121	95 181
Age group													
Below 18yrs	890	494	1050	1189	979	1707	7763	18964	6147	5054	1968	1874	48 079
18-24	570	465	708	556	390	543	913	1212	627	449	445	1608	8 486
25-34	888	739	960	890	905	1079	1596	1898	959	1191	1029	3044	15 178
35-44	715	644	687	606	688	689	995	1548	769	757	683	1448	10 229
45-54	496	333	416	554	456	611	733	797	558	446	449	848	6 697
55-64	277	241	326	400	245	300	379	355	325	228	222	965	4 263
65+ yrs	161	130	198	190	161	189	157	128	369	125	107	334	2 249
	3 997	3 046	4 345	4 385	3 824	5 118	12 536	24 902	9 754	8 250	4 903	10 121	95 181
Gender													
Female	2185	1598	2372	2392	2121	2819	6580	13433	5070	4496	2697	5852	51 615
Male	1812	1448	1973	1993	1703	2299	5956	11469	4684	3754	2206	4269	43 566
	3 997	3 046	4 345	4 385	3 824	5 118	12 536	24 902	9 754	8 250	4 903	10 121	95 181
Travel partnership													
Alone	77	67	101	56	113	92	70	62	62	68	70	139	977
With Spouse	724	522	504	624	552	856	776	795	674	679	653	1542	8 901
With Colleagues	503	646	619	385	486	599	586	597	427	496	469	2127	7 940
With Friends & relatives	1025	763	617	758	808	812	862	970	961	572	571	1887	10 606
With Family	949	527	854	1080	926	1125	1099	805	884	780	428	2055	11 512
With Children	178	115	213	232	135	131	140	238	325	231	266	714	2 918
Packaged Tour	242	199	584	242	246	75	498	755	112	593	330	580	4 456
School tour	170	145	765	953	402	1269	8341	20361	6186	4729	1980	340	45 641
Other	129	62	88	55	156	159	164	319	123	102	136	737	2 230
	3 997	3 046	4 345	4 385	3 824	5 118	12 536	24 902	9 754	8 250	4 903	10 121	95 181

Source: Day Visitor Survey, STA

Table 10: Accommodation Data

ACCOMMODATION STATISTICS 2010														
ROOMS AVAILABLE														
Hotel Location	January	February	March	April	May	June	July	August	September	October	November	December	Total	
<i>Mbabane</i>	3 140	2 921	3 139	2 995	3 079	3 010	3 077	3 078	3 008	3 067	2 985	3 076	36 575	
<i>Ezulwini</i>	21 052	19 370	21 142	20 370	21 052	20 340	21 052	21 052	20 370	21 052	20 370	21 052	248 274	
<i>Manzini</i>	8 494	7 865	8 494	8 220	8 494	8 220	8 494	8 494	8 220	8 494	8 220	8 494	100 203	
<i>Rest of Swaziland</i>	15 500	14 354	15 531	14 910	15 030	16 278	16 303	15 783	16 303	16 023	16 023	16 551	188 097	
Grand Total	48 186	44 510	48 306	46 495	48 156	46 600	48 901	48 927	47 381	48 916	47 598	49 173	573 149	
ROOM NIGHTS SOLD														
<i>Mbabane</i>	1 854	1 959	1 694	1 179	1 442	2 075	1 982	1 987	1 668	1 200	1 550	1 678	20 268	
<i>Ezulwini</i>	12 303	12 685	14 744	15 759	18 909	12 040	15 566	17 565	15 562	17 148	17 803	16 768	186 852	
<i>Manzini</i>	1 559	1 901	3 127	2 047	2 394	2 351	2 666	3 374	3 044	3 611	3 033	3 476	32 583	
<i>Rest of Swaziland</i>	5 735	6 400	6 711	5 996	4 587	9 668	5 729	7 368	5 262	6 066	6 995	6 010	76 527	
Grand Total	21 451	22 945	26 276	24 981	27 332	26 134	25 943	30 294	25 536	28 025	29 381	27 932	316 230	
NUMBER OF BEDS AVAILABLE														
<i>Mbabane</i>	5 683	5 323	5 712	5 501	5 701	5 644	5 829	5 833	5 641	5 835	5 633	5 843	68 178	
<i>Ezulwini</i>	40 143	35 676	40 889	42 390	40 071	42 510	40 226	40 206	38 960	40 226	38 940	40 226	480 463	
<i>Manzini</i>	14 105	12 740	14 105	12 840	13 702	13 260	14 477	14 477	14 010	14 477	14 010	14 477	166 680	
<i>Rest of Swaziland</i>	33 821	29 200	32 302	30 030	31 868	30 840	31 925	32 209	31 234	32 155	32 168	33 223	380 975	
Grand Total	93 752	82 939	93 008	90 761	91 342	92 254	92 457	92 725	89 845	92 693	90 751	93 769	1 096 296	
NUMBER OF BED-NIGHTS SOLD														
<i>Mbabane</i>	4 001	3 881	3 878	3 117	3 776	3 267	2 585	2 759	2 613	1 974	2 624	2 619	37 094	
<i>Ezulwini</i>	18 125	18 000	20 522	22 007	17 577	15 317	17 992	21 302	22 489	22 637	23 683	19 628	239 279	
<i>Manzini</i>	1 729	1 851	3 141	2 569	2 514	2 284	3 068	3 615	3 112	3 660	3 161	3 607	34 311	
<i>Rest of Swaziland</i>	7 846	8 869	9 173	9 255	6 682	8 045	9 309	9 903	9 228	8 156	10 518	9 480	106 464	
Grand Total	31 701	32 601	36 714	36 948	30 549	28 913	32 954	37 579	37 442	36 427	39 986	35 334	417 148	
NUMBER OF DOMESTIC TOURISTS														
<i>Mbabane</i>	203	213	221	181	286	209	199	231	211	200	343	204	2 701	
<i>Ezulwini</i>	4 727	3 938	4 976	4 973	4 844	3 857	4 344	4 085	5 316	4 660	4 725	4 509	54 954	
<i>Manzini</i>	163	217	299	332	267	300	304	305	318	248	425	259	3 437	
<i>Rest of Swaziland</i>	2 876	4 008	3 499	4 006	2 785	3 107	3 385	5 610	3 028	3 636	4 012	3 259	43 211	
Grand Total	7 969	8 376	8 995	9 492	8 182	7 473	8 232	10 231	8 873	8 744	9 505	8 231	104 303	
NUMBER OF INTERNATIONAL TOURISTS														
<i>Mbabane</i>	2 165	2 209	2 001	2 720	1 916	1 898	1 937	2 398	2 166	2 727	3 074	2 223	27 434	
<i>Ezulwini</i>	14 020	14 315	16 245	19 327	15 686	14 456	17 345	23 277	19 501	21 691	14 996	18 885	209 744	
<i>Manzini</i>	1 308	1 573	2 782	2 117	1 828	2 353	3 274	2 729	3 321	2 941	3 568	2 946	29 466	
<i>Rest of Swaziland</i>	5 347	4 510	6 468	6 418	4 093	5 061	6 530	6 833	6 039	6 046	6 588	7 456	71 389	
Grand Total	22 840	22 607	27 496	30 137	23 812	23 243	28 165	35 782	30 435	33 785	27 599	32 132	338 033	
TOTAL NUMBER OF TOURISTS														
<i>Mbabane</i>	2 368	2 422	2 222	2 901	2 202	2 107	2 136	2 629	2 377	2 927	3 417	2 427	30 135	
<i>Ezulwini</i>	18 747	18 253	21 221	24 300	20 530	18 313	21 689	27 362	24 817	26 351	19 721	23 394	264 698	
<i>Manzini</i>	1 471	1 790	3 081	2 004	2 384	2 128	2 657	3 579	3 047	3 569	3 366	3 827	32 903	
<i>Rest of Swaziland</i>	8 223	8 518	9 967	10 424	6 878	8 168	9 915	12 443	9 067	9 682	10 600	10 715	114 600	
Grand Total	30 809	30 983	36 491	39 629	31 994	30 716	36 397	46 013	39 308	42 529	37 104	40 363	442 336	
TOTAL BILL														
<i>Mbabane</i>	688 997	679 216	880 432	762 191	820 025	710 633	653 650	754 987	902 583	758 949	865 732	860 970	9 338 365	
<i>Ezulwini</i>	3 061 453	4 229 945	3 962 311	6 092 803	4 659 622	4 594 973	5 441 117	6 661 116	4 929 021	5 755 204	4 982 189	5 924 803	60 294 557	
<i>Manzini</i>	523 467	2 535 361	746 536	954 626	1 007 027	1 037 080	889 847	1 277 200	1 256 850	1 314 975	1 168 837	1 356 028	14 067 834	
<i>Rest of Swaziland</i>	2 014 586	2 367 381	2 127 623	3 044 154	2 318 644	2 854 596	3 129 190	3 373 680	3 423 105	3 187 453	3 992 550	3 892 011	35 724 973	
Grand Total	6 288 503	9 811 903	7 716 902	10 853 774	8 805 318	9 197 282	10 113 804	12 066 983	10 511 559	11 016 581	11 009 308	12 033 812	119 425 729	
TOURISM STATISTICS (RATES) - 2008														
1. Expenditure per Person per Night = (Total Bill/ No. of Bed-Nights Sold)														
<i>Mbabane</i>	251.748666	=	251.749								191.21	225.67	290.46	344.42
<i>Ezulwini</i>	251.984324	=	251.984								198.66	279.55	275.66	252.66
<i>Manzini</i>	410.009443	=	410.009								566.19	407.05	349.56	368.22
<i>Rest of S.D</i>	335.559184	=	335.559								251.45	342.65	349.01	393.27
Total	286.291026	=	286.291								235.78	299.31	302.78	304.79
2. Average Length of Stay = (No. of Bed Nights Sold/ No. of Tourists)														
<i>Mbabane</i>	1.23092749	=	1								1.84	1.55	1.22	0.90
<i>Ezulwini</i>	1.02667531	=	1								1.54	1.38	1.18	1.24
<i>Manzini</i>	1.04279245	=	1								1.19	1.31	1.28	1.06
<i>Rest of S.D</i>	0.80705904	=	1								1.33	1.20	1.15	1.13
Total	1.272208	=	1								1.48	1.34	1.18	1.17
3. Bed Occupancy Rates = [(No. of Bed Nights Sold/ No. of Beds Available) x100%]														
<i>Mbabane</i>	0.54407580	=	54.41								0.70	0.60	0.46	0.42
<i>Ezulwini</i>	0.49801754	=	49.80								0.49	0.44	0.52	0.55
<i>Manzini</i>	0.20584953	=	20.58								0.16	0.19	0.23	0.24
<i>Rest of S.D</i>	0.27945141	=	27.95								0.27	0.26	0.30	0.29
Total	0.38050672	=	38.05								0.37	0.35	0.39	0.40
4. Room Occupancy Rates = [(No. of Room Nights Sold/ No. of rooms Available) x100%]														
<i>Mbabane</i>	0.55414901	=	55.41								0.60	0.52	0.62	0.53
<i>Ezulwini</i>	0.75260398	=	75.26								0.65	0.76	0.78	0.83
<i>Manzini</i>	0.32516991	=	32.52								0.27	0.27	0.36	0.40
<i>Rest of S.D</i>	0.40714100	=	40.71</td											



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