



Annual Report
TOURISM STATISTICS
2014



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EXECUTIVE SUMMARY



VISITOR ARRIVALS

For the third consecutive year, international visitor arrivals to Swaziland increased by 2.0 percent in 2014. The country's main source markets continued to be neighboring South Africa (856,492) and Mozambique (213 827), with long-haul markets USA, Germany and the Netherlands also contributing significant visitor numbers. The strongest growth rates were achieved from Western Europe markets which include Germany (14.5%), Netherlands (37.2%) and France (35.5%).

VISITOR TRENDS

Travel to country was predominately by road with independent travelers accounting for 76.7% while tour buses registered 5.1% of total arrivals in the year under review. Air travel recorded a growth of 2.9% of total arrivals with the months of January and December posting the most traffic during the year. The most popular activities amongst both domestic and foreign visitors remained shopping. Culture/heritage based activities were frequented mainly students on educational tours.

ACCOMMODATION

Both the number of tourists and expenditure increased further in 2014. Overall expenditure in accommodation saw a growth of 1.07 percent in 2014 registering E276 million. The expenditure pattern varied among the different regions of the country with the Ezulwini region (E150 million) posting the best performance in terms of revenue while the Manzini (12.1%) and Mbabane region (6.4%) regions came in second and third respectively. The remaining locations within the country accounted for 27.1%.

VISITOR SATISFACTION

Overall visitor satisfaction stood at 45.6 percent with a scenery and friendly people being cited as the main highlights of the visit. The remaining 54.4 percent of visitor that expressed dissatisfaction referred to dilapidated inner city roads and lack of road signage as the main constraints. Despite the registered concerns, international visitors described their experience in country as 'exciting' with 94.8 percent indicating a willingness to return and further recommend a visit to the Kingdom.

INTRODUCTION



INTRODUCTION

This publication is the tenth in a series of annual tourism statistical reports published by the Swaziland Tourism Authority (STA). It provides a summary of inbound tourism statistics, relating how the tourism sector performed during 2014 with instances of comparisons with earlier years. The report includes information on global tourism performance, an analysis of the character, behavior and experiences of international visitors with an emphasis of the country's top seven visitor-generating markets.

Information in this edition is based on studies carried out by the STA Research Department which include data from the Exit Survey and Day Visitor Survey. Further key national statistics on the performance of the accommodation sector were provided by the Central Statistical Office. Global tourism data was sourced from international tourism and statistics organizations which include United Nations World Tourism Organization (UNWTO), EuroStats, Regional Tourism Organization for Southern Africa (RETOSA) and other relevant studies.

The report is made available for use by STA partners, researchers and the general public. The Tourism Statistics Report and previous annual reports including monthly visitor arrival statistics are accessible on the STA website <http://www.thekingdomofswaziland.com> under 'useful links' at the bottom of the homepage. STA welcomes your input and suggestions for changes and additions in future issues of this publication, and is pleased to grant permission to use excerpts from this material when credit is given to STA. For more information on Swaziland tourism statistics, please send an email to statistics@tourismauthority.org.sz or data@tourismauthority.org.sz or contact our offices (see back cover).

GLOBAL TOURISM



2.1 WORLD PERFORMANCE

International tourist arrivals reached 1,138 million in 2014, a 4.7% increase over the previous year, according to the latest UNWTO World Tourism Barometer. For 2015, UNWTO forecasts international tourism to grow by 3% to 4%, further contributing to the global economic recovery.

The number of international tourists (overnight visitors) reached 1,138 million in 2014, 51 million more than in 2013. With an increase of 4.7%, this is the fifth consecutive year of above average growth since the 2009 economic crisis.

“Over the past years, tourism has proven to be a surprisingly strong and resilient economic activity and a fundamental contributor to the economic recovery by generating billions of dollars in exports and creating millions of jobs. This has been true for destinations all around the world, but particularly for Europe, as the region struggles to consolidate its way out of one of the worst economic periods in its history,” said UNWTO Secretary-General, Taleb Rifai, opening the Spain Global Tourism Forum in Madrid.

By region, the Americas (+7%) and Asia and the Pacific (+5%) registered the strongest growth, while Europe (+4%), the Middle East (+4%) and Africa (+2%) grew at a slightly more modest pace. By subregion, North America (+8%) saw the best results, followed by North-East Asia, South Asia, Southern and Mediterranean Europe, Northern Europe and the Caribbean, all increasing by 7%.

As in recent years, the growth in international tourism receipts in 2014 is expected to have followed that of arrivals fairly close (the 2014 results for international tourism receipts will be released in April 2015). In 2013, international tourism receipts reached US\$ 1,197 billion, US\$ 230 billion more than in the pre-crisis year of 2008.

2.2 REGIONAL PANORAMA

Europe consolidates its position as the most visited region in the world

Europe (+4%), the most visited region with over half of the world's international tourists, saw an increase of 22 million arrivals in 2014, reaching a total of 588 million. Thanks to these results, tourism has been a major contributor to the European economic recovery. Northern Europe and Southern and Mediterranean Europe led growth (both +7%), while results were more modest in Western Europe (+2%). Arrivals in Central and Eastern Europe (0%) stagnated after three years of strong growth.

International tourist arrivals in **Asia and the Pacific** (+5%) increased by 13 million to 263 million. The best performance was recorded in North-East Asia and South Asia (both +7%). Arrivals in Oceania grew by 6%, while growth slowed down in South-East Asia (+2%) as compared to previous years.

The **Americas** was the best performing region in relative terms with growth of 7%, welcoming an additional 13 million international tourists and raising the total to 181 million. Growth was driven by North America (+8%), where Mexico posted a double-digit increase, and the Caribbean (+7%). Arrivals to Central America and South America (both +6%) grew at double the rate recorded in 2013 and well above the world average.

International tourism in the **Middle East** (+4%) shows signs of rebound with good results in most destinations. The region attracted an additional 2 million arrivals, bringing the total to 50 million. **Africa's** international tourist numbers grew by an

estimated 2%, equivalent to an increase of one million arrivals. The region reached 56 million tourists. While arrivals to North Africa were weak (+1%), Sub-Saharan Africa saw international tourist numbers rise by 3% despite the Ebola Virus Disease outbreak in a few West African countries. Data for Africa and the Middle East should be read with caution as it is based on limited and volatile data.

2.3 OUTLOOK FOR 2015

For 2015, UNWTO forecasts international tourist arrivals to grow between 3% and 4%. By region, growth is expected to be stronger in Asia and the Pacific (+4% to +5%) and the Americas (+4% to +5%), followed by Europe (+3% to +4%). Arrivals are expected to increase by +3% to +5% in Africa and by +2% to +5% in the Middle East.

“We expect demand to continue growing in 2015 as the global economic situation improves even though there are still plenty of challenges ahead. On the positive side, oil prices have declined to a level not seen since 2009. This will lower transport costs and boost economic growth by lifting purchasing power and private demand in oil importing economies. Yet, it could also negatively impact some of the oil exporting countries which have emerged as strong tourism source markets,” added Mr Rifai.

The positive outlook for 2015 is confirmed by the UNWTO Confidence Index. According to the 300 tourism experts consulted worldwide for the Index, tourism performance is expected to improve in 2015, though expectations are less upbeat than a year ago.

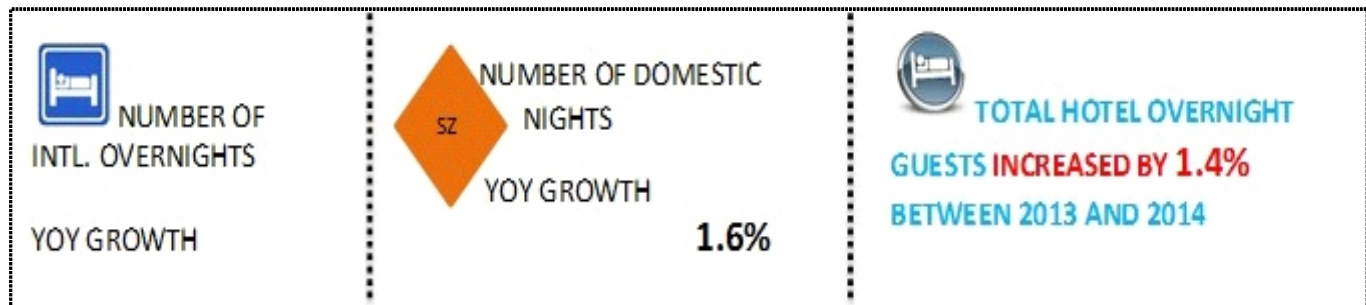
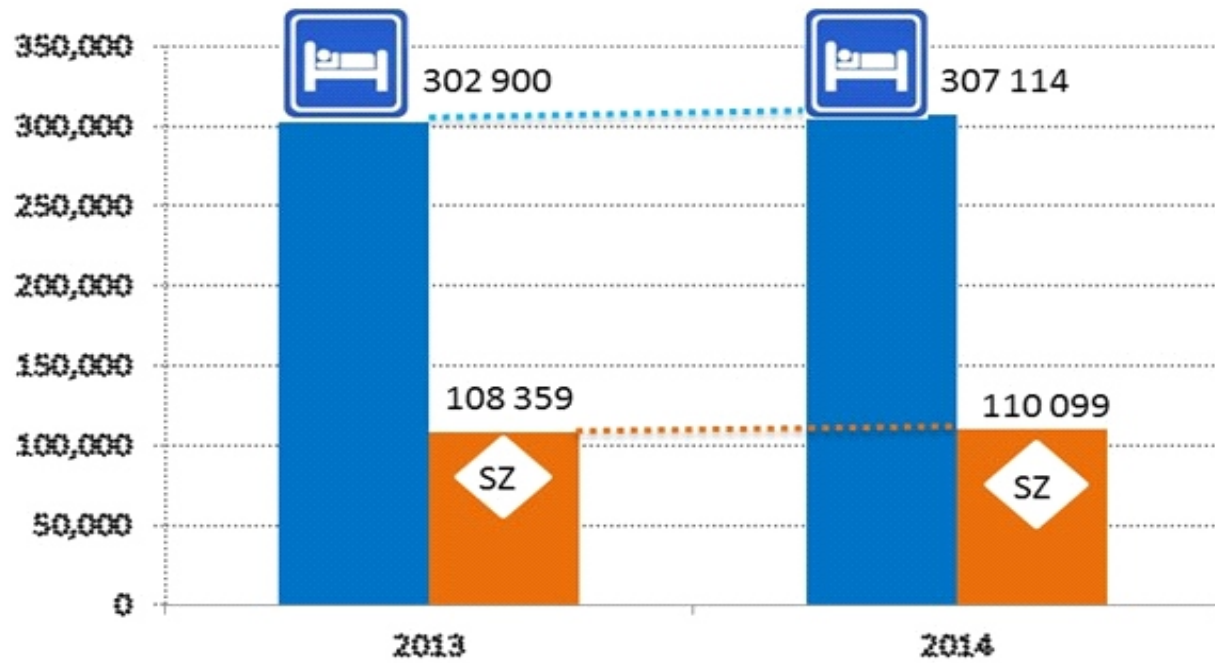
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Key Indicators

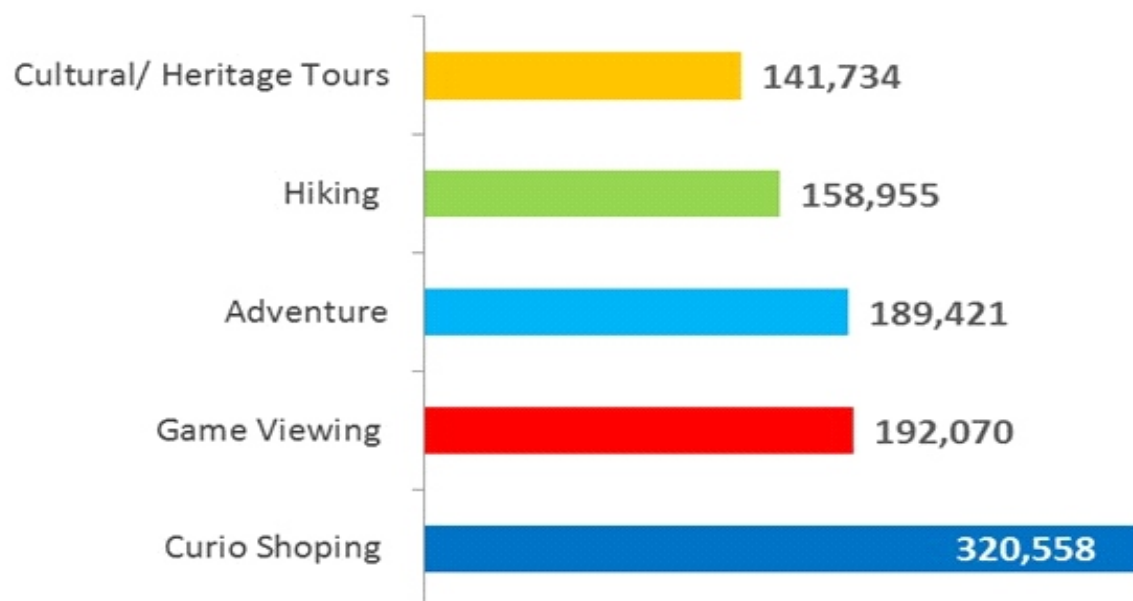
- International arrivals
- Accommodation demand and supply
- Top Attractions



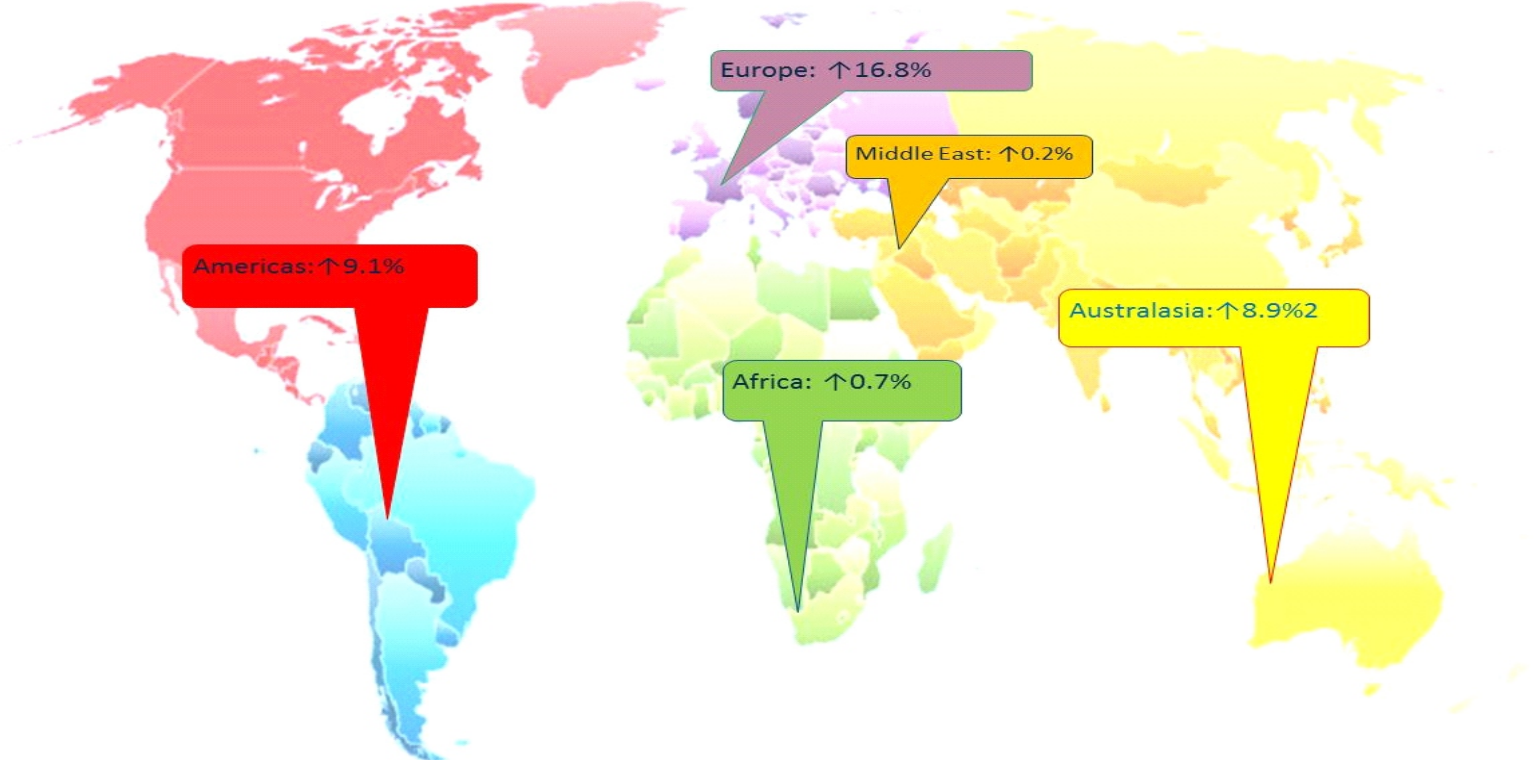
INTERNATIONAL AND DOMESTIC HOTEL OVERNIGHT GUESTS 2013/2014



TOP FIVE ACTIVITIES



INTERNATIONAL ARRIVALS TO SWAZILAND 2014



Source: STA and the Department of Immigration

ACCOMMODATION SECTOR 2014

Occupancy

44.7%

↓ 2.0%

Hotel Av. Nights

0.92 nights

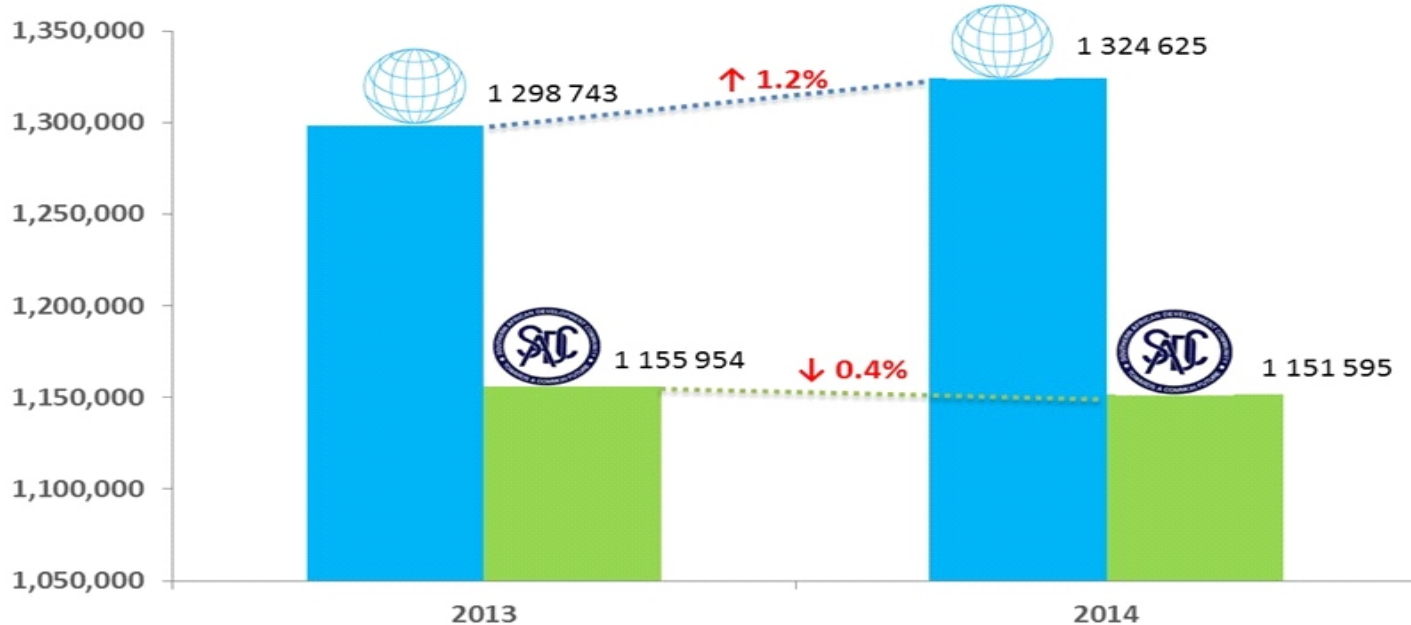
↓ 0.01%

Total Acc. Bill

E276 million

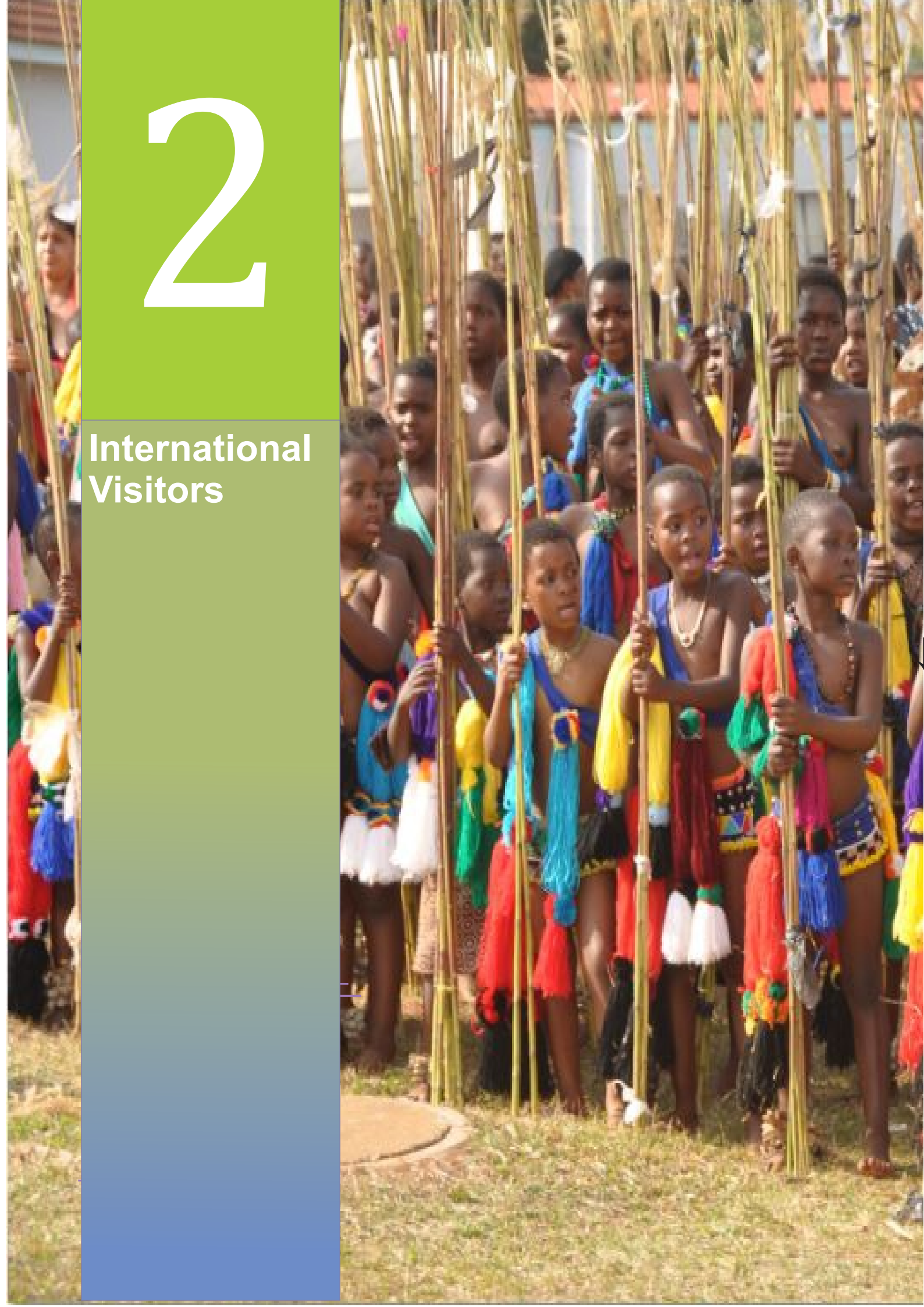
↑ 1.07%

INTERNATIONAL AND SADC ARRIVALS 2013/2014








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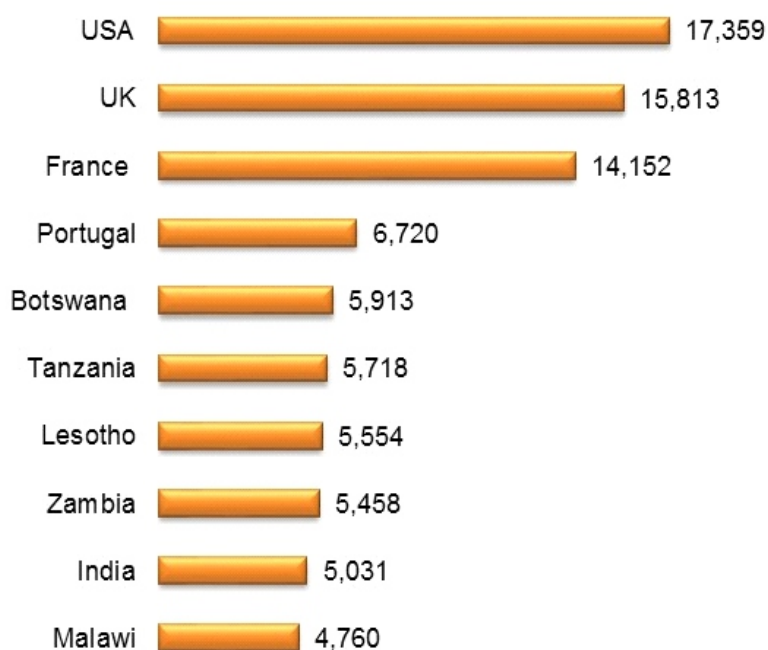
International Visitors



For the second time since 2011 all world regions demonstrated growth in visitor arrivals when compared to the preceding year. The largest visitor-generating region remained Africa, accounting for over 88.9 percent of total arrivals in 2014. Europe demonstrated renewed growth with 16.8 percent, with the Americas (+9.1 percent) and Asia and Australasia (+7.7 percent) also displaying impressive growth.

International Visitor Arrivals: Top 15 Markets, 2014

1		856 492	↓ 2.2% Δ vs 2013
2		219 555	↑ 2.7% Δ vs 2013
3		58 624	↑ 49.3% Δ vs 2013
4		21 669	↑ 14.5 % Δ vs 2013
5		16 428	↑ 37.2 % Δ vs 2013



Source: Exit Survey 2014 Swaziland Tourism Authority

Africa: although accounting for the highest arrivals (1 177 815), growth from the region remained marginal with 0.7 percent increase year-on-year. Swaziland's top two source markets, Mozambique (+2.7 percent) and RSA (-2.2 percent) remained relatively flat over the period.

Americas: a 9.1 percent growth in arrivals coupled with the longest average of stay of 4.0 nights in 2014 generated 103 361 visitor nights from American visitors. USA, the country's sixth largest source market accounted for 76.5 percent of the 22 685 visitor arrivals from the region in 2014.

Asia and Australasia: arrivals from the region climbed 7.7 percent in 2014 to record 22 688 arrivals. India, as in previous years was the lead visitor-generating market accounting for 5 031 for the year.

Europe: registering double-digit growth, the region's rebound proved to be the success story for 2014. Key markets Germany (+14.5 percent), France (+35.5 percent) and Netherlands (+37.2 percent) all demonstrated strong growth during this period. Secondary source markets Belgium (+24.4 percent), Italy (+18.1 percent) and Switzerland (+11.3 percent) remain in the radar as these markets continue to perform positively.

3

Country Profile

- RSA
- Mozambique
- UK
- Germany
- Netherlands
- France
- USA





RSA	
Total Population	54 002 000
	Province
	Eastern Cape 6 786 900 (12.6%)
	Free State 2 786 800 (5.2%)
	Gauteng 12 914 800 (23.9%)
	KwaZulu-Natal 10 694 800 (19.8 %)
	Limpopo 5 630 500 (10.4%)
	Mpumalanga 4 229 300 (7.8%)
	Northern Cape 1 166 700 (2.2%)
	North West 3 676 300 (6.8%)
	Western Cape 6 116 300 (11.3%)
GDP Per Capita (PPP)	\$6 617
Internet users	24,909,854
Facebook Users	6,269,600
Languages	Xhosa Zulu Swati Afrikaans English Ndebele Tsonga Venda Southern Sotho Setswana Sepedi
Currency	Rand (ZAR)
Annual Leave Entitlement	21days

3.1.1 Market Overview

In 2014

- International visitor arrivals from RSA stood at 856 492, which is representative of a decline of 2.2 percent when compared to 2013. The decline was partly occasioned by a combination of factors ranging from heavy industrial action during the year and a notable expansion in domestic tourism (+44 percent) in RSA in 2014.
- The number of South African tourists spending one night or more in the Kingdom declined marginally (-1.9%) to 549 557, down from 560 404 in 2013.
- An impressive 87.0 percent of visitors from RSA indicated that they were repeat visitors.
- Swaziland was once again mostly visited by South Africans in the age groups 35-44 (39.1 percent) and 45-54 (27.4 percent).

3.1.2 Main purpose of visit

- Holiday visits proved popular in 2014 as 40.1 percent of South African visitors indicated that were in the country for holiday purposes. Travellers on transit accounted for 26.7 percent of South African visitors while those on business trips and visiting friends and relatives accounted for 16.1 percent and 13.1 percent of all RSA visitors, respectively.
- The average number of nights spent by South African tourists on holiday was 2.3 nights while those visiting friends and relatives stayed slightly longer (3.3 nights). Business nights declined to 1.9 nights in 2014, down from 2.3 nights recorded in 2013.

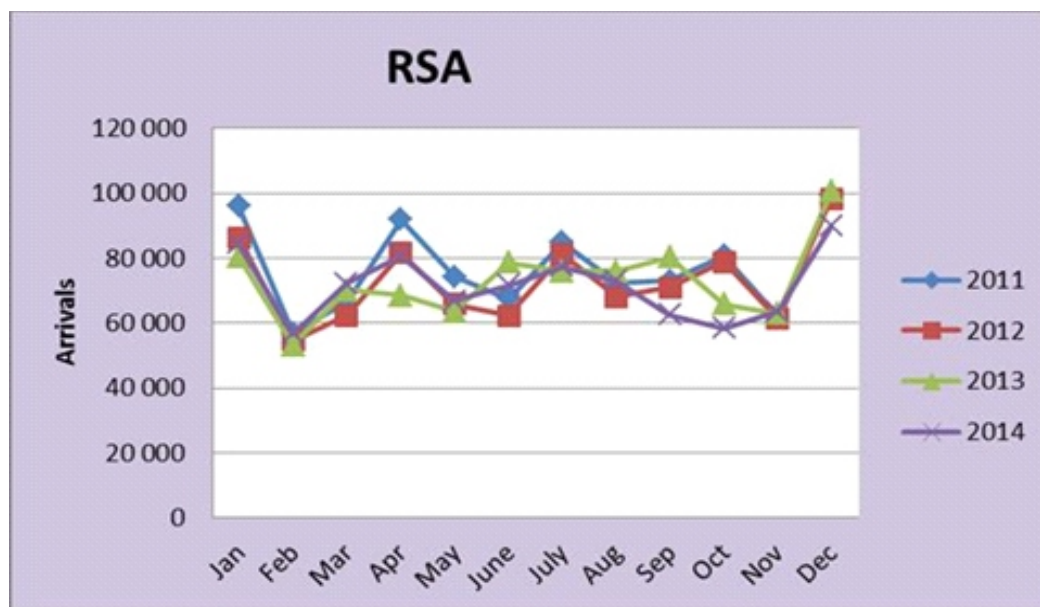
Table 2 RSA Purpose of visit by Average Nights Spent, 2014

Main Reason	Average Nights	Total Tourists
Holiday	2.3	343 635
VFR	3.3	114 417
Business	1.9	137 493
Transit	0.0	229 026
Other	2.8	31 931

3.1.3 Seasonality

- During 2014, the months of February and October recorded the lowest volumes of visitor arrivals while January and December were the peak months for South African arrivals into the country.

Chart 5 RSA visitor arrivals by month



3.1.4 Distribution

- With respect to source of information on Swaziland as a travel destination, most visitors from South Africa indicated that they already knew about the country (75.4 percent). Word of mouth was the leading source of information with 10.4 percent of South African visitors indicating the destination was recommended by friends and/or relatives.

Mozambique



Mozambique	
Total Population	26,472,977
Major city population	Maputo 1,191,613
	Matola 675,422
	Beira 530,604
	Nampula 388,526
	Chimoio 256,936
	Nacala 224,795
	Quelimane 188,964
	Tete 129,316
	Xai-Xai 127,366
GDP Per Capita (PPP)	\$605.0
Internet users	1,467,687
Facebook Users	362,560
Languages	Emakhuwa 25.3%, Portuguese (official) 10.7%, Xichangana 10.3%, Cisena 7.5%, Elomwe 7%, Echuwabo 5.1%, other Mozambican languages 30.1%, other 4% (1997 census)
Currency	Metical
Annual Leave Entitlement	25days

3.2.1 Market Overview In 2014

- Mozambique was Swaziland's second largest inbound market with 219 555 visitors, an increase of 2.7 percent from the total recorded in 2013.
- The number of visitors from Mozambique spending a night or more in Swaziland declined to 80 756, from 96 008 recorded in 2013 primarily due to the fact there was a significant observable increase in the proportion of visitors from Mozambique indicating that they were on transit (56.4 percent in 2014 vs 13.0 percent in 2013).
- On average, Mozambicans spent 0.7 nights in Swaziland, a figure lower than the national average length (2.00 nights).
- Mozambique ranked highest in terms of repeat visitors with 94.6 percent of these nationals indicating to have visited the country before.
- In 2014, the age profile of Mozambican visitors to Swaziland was similar to that of South Africa as the Kingdom was popular among those aged 35-44 (46.3 percent) and 45-54 years (29.8 percent).

3.2.2 Main purpose of visit

- The proportion of Mozambicans coming to Swaziland primarily for holiday remained 38.3 percent in 2014 as was the case in 2013. Business tourists accounted for 1.7 percent of the neighbouring visitors while the proportion visiting friends and relatives fell to 5.0 percent in 2014 from 9.1 percent in 2013.
- The average number of nights Mozambican tourists spent in Swaziland for holiday declined marginally, from 1.7 nights in 2013 to 1.5 nights in 2014. On the other hand, the average number of nights Mozambican tourists spent visiting friends and relatives also experienced decline owing the increase in the volume of Mozambicans transiting through the country.

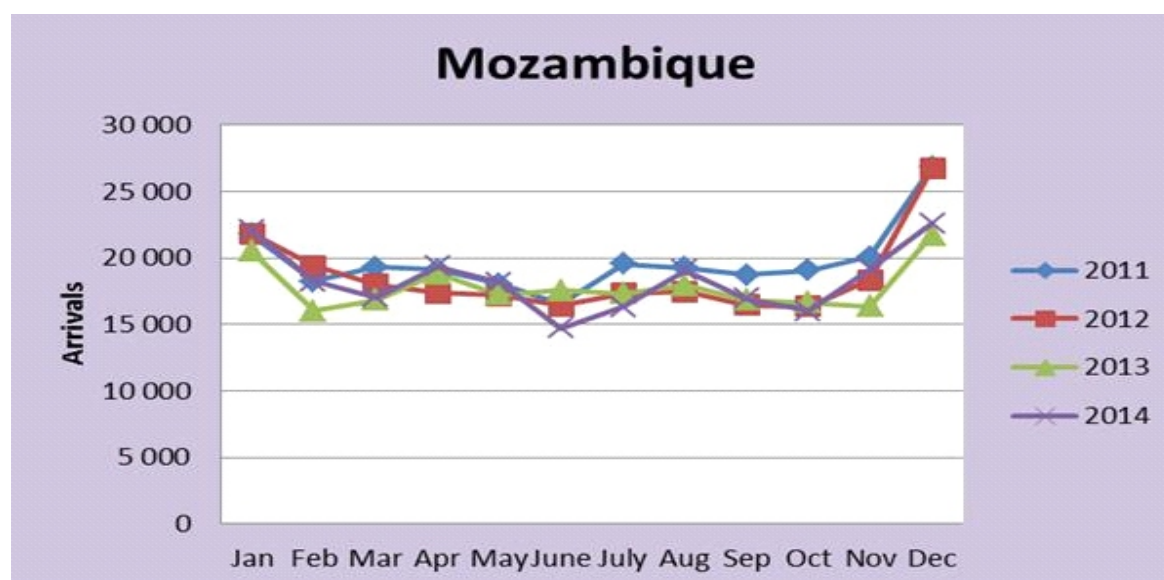
Table 3 Mozambique purpose of visit by Average Nights Spent

Main Reason	Average Nights	Total Tourists
Holiday	1.5	83399
VFR	1.4	11058
Business	0.7	3686
Transit	0.0	120490
Other	0.7	922

3.2.3 Seasonality

- The summer months of January and December were the peak periods for visitors from this market in 2014 along with the Easter month of April and Umhlanga period in August. A graphical assessment of arrivals from Mozambique shows fluctuations that are generally constant throughout the years compared below.

Chart 6: Mozambique- Monthly arrivals (2011-2014)



Distribution

- Most (68.2 percent) Mozambicans indicated that they already knew about Swaziland which would be expected granted the proximity of the two countries to each other.
- Word of mouth (13.9 percent) rated highest as the main source of information for Mozambican travellers while the remaining travellers used the internet (8.5 percent) and travel agents (5.9 percent) for information on Swaziland.

UK



UK		
Total Population	63,489,234	
Major cities (ranked by population)	London	7,556,900
	Birmingham	984,333
	Liverpool	468,945
	Leeds	455,123
	Sheffield	447,047
	Bristol	430,713
	Manchester	395,515
GDP Per Capita (PPP)	\$41,787.5	
Internet users	57,266,690	
Facebook Users	32,950,400	
Number of pensioners	10,341,628	
Languages	English	
Currency	Pound	
Annual Leave Entitlement	28days	

3.3.1 Market Overview In 2014

- The UK was the seventh largest visitor generating market with 15 813 visitor arrivals in 2014, a decline of 3.7 percent when compared to the 16 428 recorded in 2013.
- A significant (83.2 percent) proportion of visitors from the UK spent at least one night in Swaziland during the year under review. About 28.9 percent of UK tourists spent one night in Swaziland while 25.8 percent indicated to have spent two nights.
- The average length of stay for UK visitors in Swaziland was 3.3 nights, which is a night more than the national average which stands at 2.2 nights.
- About four out of ten tourists from the UK said they visited the country more than once in 2014. This is a reasonably robust visitor repeat rate granted the fact that the UK is a long haul market for Swaziland.
- An analysis of the demographic profile of UK visitors to Swaziland revealed the country was visited mostly by people in the age groups 45-54 (23.4 percent) and 55-64 (24.1 percent).

3.3.2 Main purpose of visit

- About 75.9 percent of UK residents gave holiday as their primary reason for visiting Swaziland
- 10.3 percent of Britons had business as their main purpose of visit while 4.1 percent said they had come to for visiting friends and relatives.
- The number of average holiday nights spent by UK tourists in Swaziland increased marginally to 2.6 nights in 2014 from 2.3 nights in 2013. Business nights declined to 7.6 nights in 2014 down from 9.6 nights in 2013.

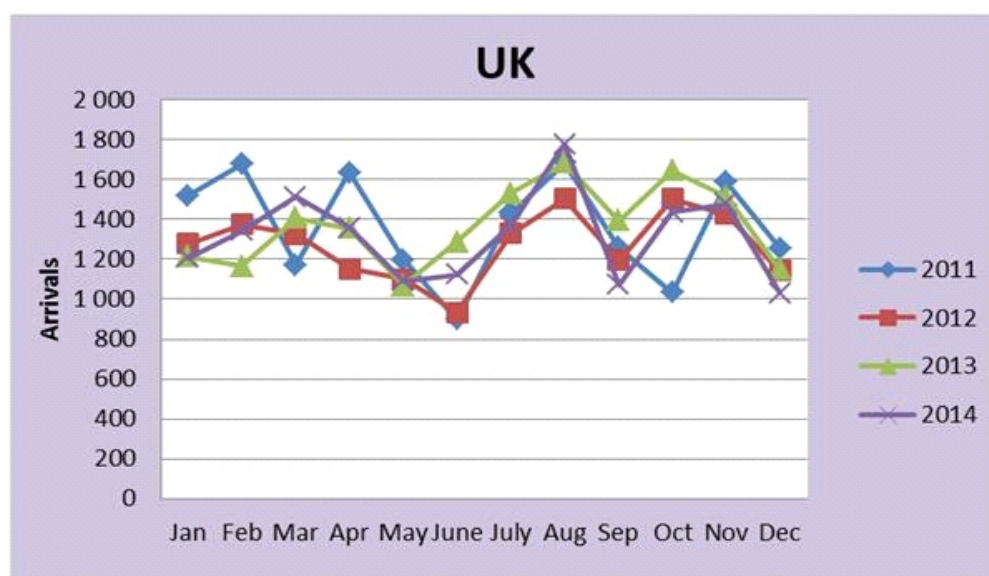
Table 4 UK purpose of visit by Average Nights Spent

Main Reason	Average Nights	Total Tourists
Holiday	2.6	11996
VFR	8.0	654
Business	7.6	1636
Transit	0.0	1418
Other	27.0	109

3.3.3 Seasonality

- The summer months of August and October were the peak arrival months for UK travellers. As clearly demonstrated in chart 7, UK arrivals experienced a slowdown in growth after strong performances in 2013.

Chart 7 UK- Monthly arrivals (2011-2014)



3.3.4 Distribution

- Travel agents (17.1 percent) were the primary source of information on Swaziland for most British visitors with the internet also proving very instrumental (15.8 percent).
- An impressive 44.7 percent indicated that they already knew about Swaziland, which is more than double the proportion recorded in 2013 (20.3 percent)
- Word of mouth reference played a key role in the distribution of information on Swaziland, rating as the second highest source with 16.8 percent of British travellers indicating to have heard of Swaziland from friends and relatives.

Germany



Germany	
Total Population	82,562,004
Major cities (ranked by population)	Berlin 3,426,354
	Hamburg 1,739,117
	Munich 1,260,391
	Köln 963,395
	Frankfurt 650,000
	Essen 593,085
	Stuttgart 589,793
	Dortmund 588,462
	Düsseldorf 573,057
GDP Per Capita (PPP)	\$46,268.6
Internet users	71,727,551
Number of pensioners	16,774,797
Facebook Users	25,332,440
Languages	Standard German
Currency	Euro
Annual Leave Entitlement	24 days

3.4.1 Market Overview

In 2014

- Germany was the leading overseas market and fourth largest visitor generating market with 21669 visitor arrivals in 2014, a 14.5 percent increase from the 18 933 recorded in 2013.
- On average, German overnight guests spent 1.8 nights in Swaziland, which is significantly lower than the European average (4.7 nights). This foregoing represents an opportunity for the country to increase the average length of stay for German visitors granted the considerable expansion of the markets in recent years.
- The repeat visit rate 18.0 percent of German arrivals in 2014 were repeat visitors.
- The demographic profile of these nationals revealed that most Germans who visited Swaziland were in the age groups 35-44 years (29.0 percent) and 45-54 years (25.1 percent).

3.4.2 Main purpose of visit

- About 87.2 percent of German visitors said they were in the country for holiday purposes while those visiting friends and relatives and business travellers represented only 0.6 percent and 2.6 percent, respectively, of all German arrivals.
- Holiday nights increased marginally to 1.8 nights in 2014 from 1.6 nights in 2013. The year 2014 also saw the average number of nights spent by tourists visiting friends and relatives falling considerably to 1.8 nights from 5.4 nights in 2013. This is to be expected granted the decline in the actual number of people coming into the country for seeing family and friends.

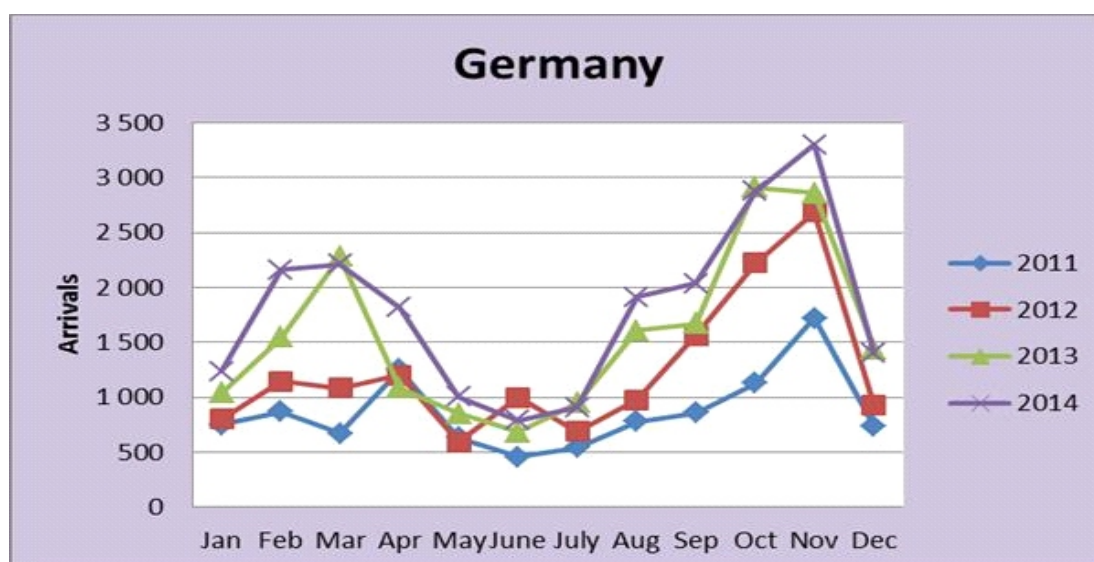
Table 5 Germany purpose of visit by Average Nights Spent

Main Reason	Average Nights	Total Tourists
Holiday	1.8	18899
VFR	1.8	140
Business	5.8	561
Transit	0.0	1999
Other	21.0	70

3.4.3 Seasonality

- October and November registered the highest number of arrivals in 2014 with mini-peaks noted in the months of February and March. Strong economic growth in the first and last quarters of 2014 has a positive net effect on the travel propensity for many Germans. This coupled with the weak Lilangeni against the Euro over most months in 2014, eased costs associated with long haul travel.

Chart 8: Germany- Monthly arrivals (2011-2014)



3.4.4 Distribution

- Travel agents were the primary source of information on Swaziland for German tourist with 27.5 percent using them as their source for travel information on the country while 30.4 percent said they already knew about Swaziland.
- The internet (24.5 percent) and word of mouth references (11.4 percent) also played very important roles in informing travellers about Swaziland.

Netherlands



Netherlands	
Total Population	16 829 289
Major cities (ranked by population)	Amsterdam 741,636
	Rotterdam 598,199
	The Hague 474,292
	Utrecht 290,529
	Eindhoven 209,620
GDP Per Capita (PPP)	\$50,793.1
Internet users	16,143,879
Number of pensioners	2,625,876
Facebook Users	7,554,940
Languages	Dutch (Official) Achterhoeks Drents Western Frisian Gronings Limburgisch Sinte Romani Vlax Romani Sallands Stellingwerfs Twents Veluws Western Yiddish
Currency	Euro
Annual Leave Entitlement	25days

3.5.1 Market Overview In 2014

- The Netherlands was the fifth largest overseas visitor generating market with 17874 arrivals, representing a 37.2 percent increase from 13 032 recorded in 2013.
- The average length of stay for the Dutch was 2.6 nights which represents an improvement from the 1.6 nights recorded in 2013.
- The repeat visitor rate stood at 16.2 percent which is reasonable granted the fact that this is an overseas market. A significant proportion (67.6 percent) of these repeat visitors came to the country about 3-4 times during the year.
- An analysis of the demographics of Dutch visitors revealed that Swaziland generally attracted mature travellers with most travellers in the age groups 35-44 years (21.8 percent) and 55-64 years (23.6 percent). Those aged 25-34 years (20.5 percent) and 45-54 years (20.9 percent) also had fairly significant representation in total Dutch arrivals to Swaziland in 2014.

3.5.2 Main purpose of visit

- Holiday visits were the highest at 93.6 percent, while business registered 1.1 percent.
- Dutch tourists that visited Swaziland for private purposes (visiting friends and relatives) were day visitors as they indicated that they did not spend any nights in the country.
- In 2014 Dutch tourists stayed an average of 2.7 nights in Swaziland for holiday purposes, which is 1.2 nights higher than in 2013. Business nights stood at 5.2 nights.

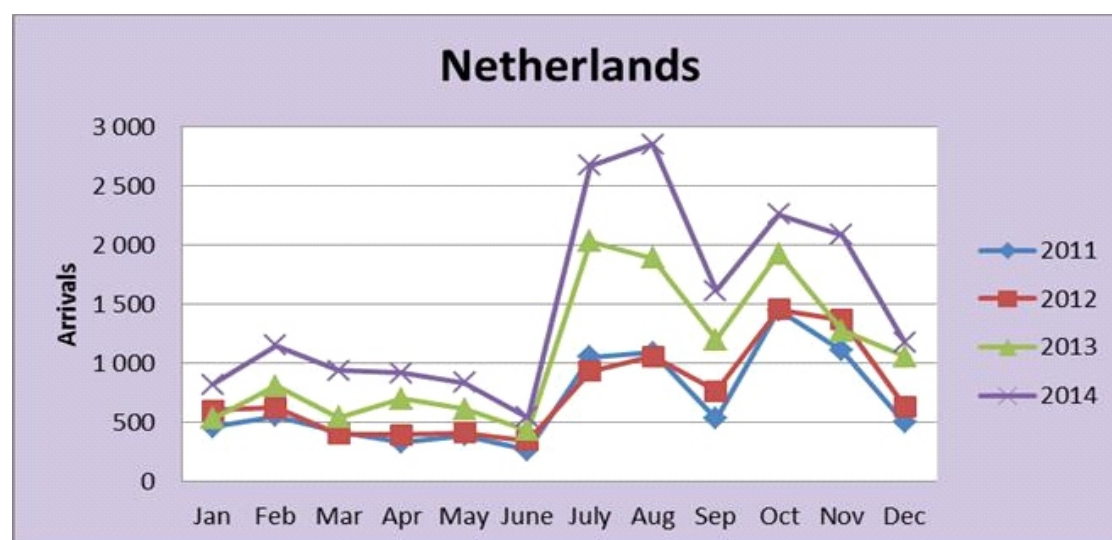
Table 6 Netherlands purpose of visit by Average Nights Spent

Main Reason	Average Nights	Total Tourists
Holiday	2.7	16727
VFR	0.0	40
Business	5.2	198
Transit	0.0	870
Other	0.0	40

3.5.3 Seasonality

- A look at the seasonal variation of visitor arrivals from the Netherlands reveals that 2014 kept in tandem with the past years as July and August were once again the peak periods for arrivals from the Netherlands. May and June continued to be the months where visitor numbers struggled.

Chart 9: Netherlands- Monthly arrivals (2011-2014)



3.5.4 Distribution

- Travel agents (34.3 percent) were the leading source of information on Swaziland for Dutch visitors.
- The internet (21.9 percent) was also a key source of information about the country as a travel destination.
- Print media (3.3 percent) was used rather sparingly.

France



France	
Total Population	64,982,894
Major cities (ranked by population)	Paris 2138551
	Marseille 794811
	Lyon 472317
	Toulouse 433055
	Nice 338620
	Nantes 277269
	Strasbourg 274845
	Montpellier 248252
GDP Per Capita (PPP)	\$42,503.3
Internet users	55,221,000
Number of pensioners	10,464,938
Facebook Users	25,624,760
Languages	French
Currency	Euro
Annual Leave Entitlement	37days

3.6.1 Market overview In 2014

- Swaziland recorded 14 152 international visitor arrivals from France indicating an increase of 35.5 percent from the 10 445 recorded in 2013.
- The average number of nights French tourists spent in Swaziland was 1.6 nights, which is slightly lower than the national average (2.2 nights) but significantly lower than the European average (4.7 nights).
- The repeat visit rate for French visitors was 10.1 percent, meaning one in ten French visitors to Swaziland was a repeat visitor.
- Most of the French tourists who came to Swaziland were in the age groups 35-44 years (29.8 percent) and 55-64 years (20.7 percent).

3.6.2 Main purpose of visit

- Holiday accounted for a satisfactory 92.3 percent, while business (1.1 percent) recorded a relatively lower share. Transit visitors were at 6.4 percent.
- The number of nights spent by French tourists on business trips increased to 8.8 nights in 2014 from the 6.1 nights recorded in 2013.
- The average number of nights spent by French tourist on holiday trips to Swaziland stood at 1.6 nights. Popular activities among French tourists were wildlife (21.6 percent), cultural (19.9 percent) and adventure (16.6 percent). About 70.0 percent of these activities were at Ezulwini which partly explains the rather short length of stay.

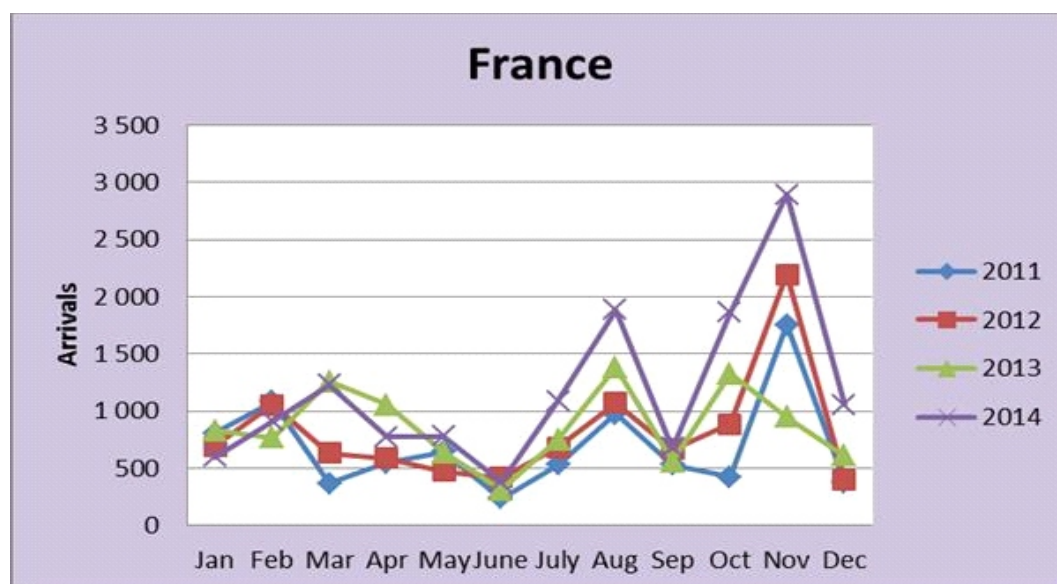
Table 7: France purpose of visit by Average Nights Spent

Main Reason	Average Nights	Total Tourists
Holiday	1.6	13060
VFR	0.0	0
Business	8.8	151
Transit	0.0	903
Other	0.0	38

3.6.3 Seasonality

- November was the peak month for arrivals from France which represents a slight shift from the October peak recorded in 2013.
- 2014 saw an improved performance from the French market as demonstrated in chart 10, with higher arrival figures recorded in winter months as compared to the previous two years.

Chart 10: France- Monthly arrivals (2011-2014)



3.6.4 Distribution

- Travel agents (31.8 percent) were the primary source of information on Swaziland for French travellers, reflecting an increase from the proportion recorded in 2013 (26.3 percent).
- French visitors also made significant use of the internet (26.1 percent) and, to a less extent, word of mouth reference (7.8 percent) as source information on Swaziland. Print media accounted for 4.8 percent in the list of main sources of travel information on Swaziland.

USA



USA		
Total Population	318,857,056	
Major cities (ranked by population)	City	2014 Population
	New York	8,405,837
	Los Angeles	3,884,304
	Chicago	2,718,782
	Houston	2,195,914
	Philadelphia	1,553,165
	Phoenix	1,513,367
	San Antonio	1,409,019
	San Diego	1,355,896
	Dallas	1,257,676
GDP Per Capita (PPP)	\$51,749	
Internet users	277,203,319	
Number of pensioners	41,122,905	
Facebook Users	163,817,940	
Languages	English-USA	
Currency	Dollar	
Annual Leave Entitlement	30days	

3.7.1 Market Overview In 2014

- USA was the third largest overseas source market for Swaziland in 2014 with 17 359 visitors, representing a 9.8 percent increase from 15 816 recorded in 2013.
- This source market registered the highest average length of stay in comparison to the other markets with 4.8 nights, a figure significantly greater the national average (2.2 nights)
- USA ranked joint highest (with the UK) in terms of repeat visits as four out of ten American visitors indicated they were repeat visitors.
- The demographic assessment of USA tourist to Swaziland revealed that the country was mostly visited by Americans in the age groups 25-34 years (21.8 percent) and 35-44 years (32.6 percent).

3.7.2 Main purpose of visit

- In 2014, the proportion of American visitors indicating they were in the country for holiday purposes fell to 64.2 percent from 72.9 percent in 2013. Business trips (17.3 percent) recovered slightly from the slump of 2013 (11.5 percent) while those visiting friends and relatives accounted for 6.7 percent of total arrivals from the USA.
- The average number of nights spent by Americans visiting friends and relatives declined marginally to 6.6 nights in 2014 from 7.2 recorded in 2013. The year-on-year differences between the business and holiday segments remained negligible.

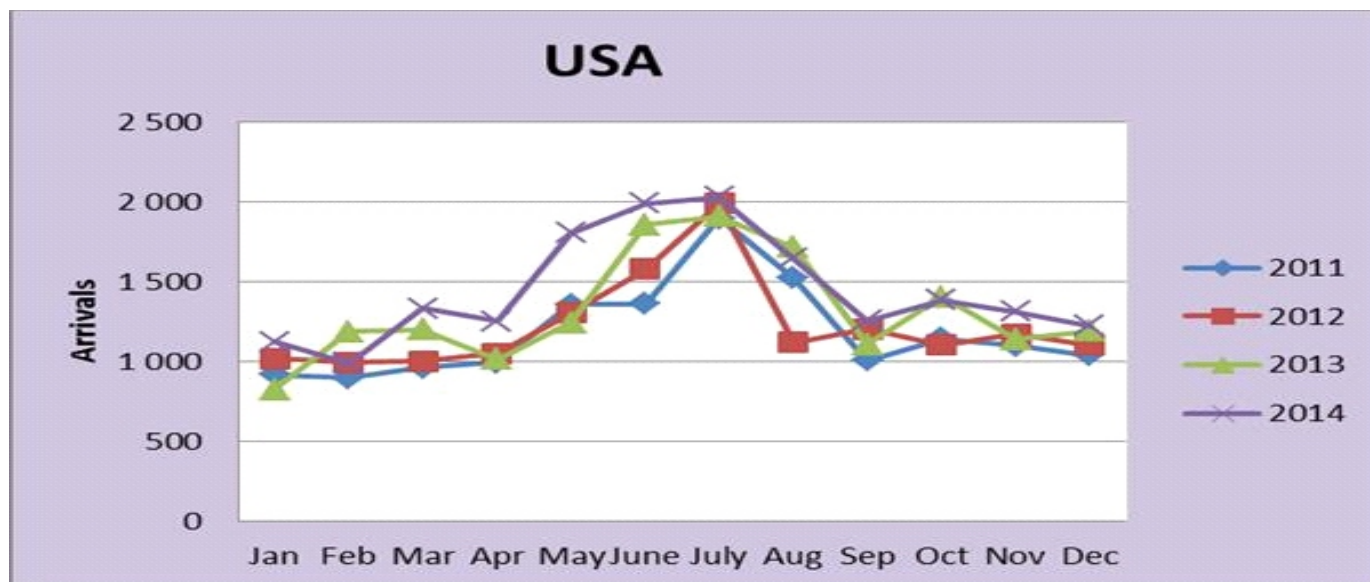
Table 8 USA purpose of visit by Average Nights Spent

Main Reason	Average Nights	Total Tourists
Holiday	2.9	11147
VFR	6.6	1165
Business	11.1	2995
Transit	0.0	1054
Other	12.7	998

3.7.3 Seasonality

- As was the case in 2013, the months of June and July registered the highest number of arrivals in 2014 as the summer season (northern hemisphere) typically ushers in the peak period for holiday travelled in America.

Chart 11: USA - Monthly arrivals (2011-2014)



3.7.4 Distribution

- Word of mouth (17.7percent) proved to be the premier source for information on Swaziland while the internet (11.5 percent) was also employed to source information on Swaziland.
- Americans also made less use of the television and print media to source information on Swaziland with most (47.5 percent) indicating that they already knew about Swaziland.

4

Purpose of Visit

- Holiday visitors were down by 5.1 %
- Top 3 source markets for business travel were RSA, USA and the UK
- VFR segment records the highest repeater rate

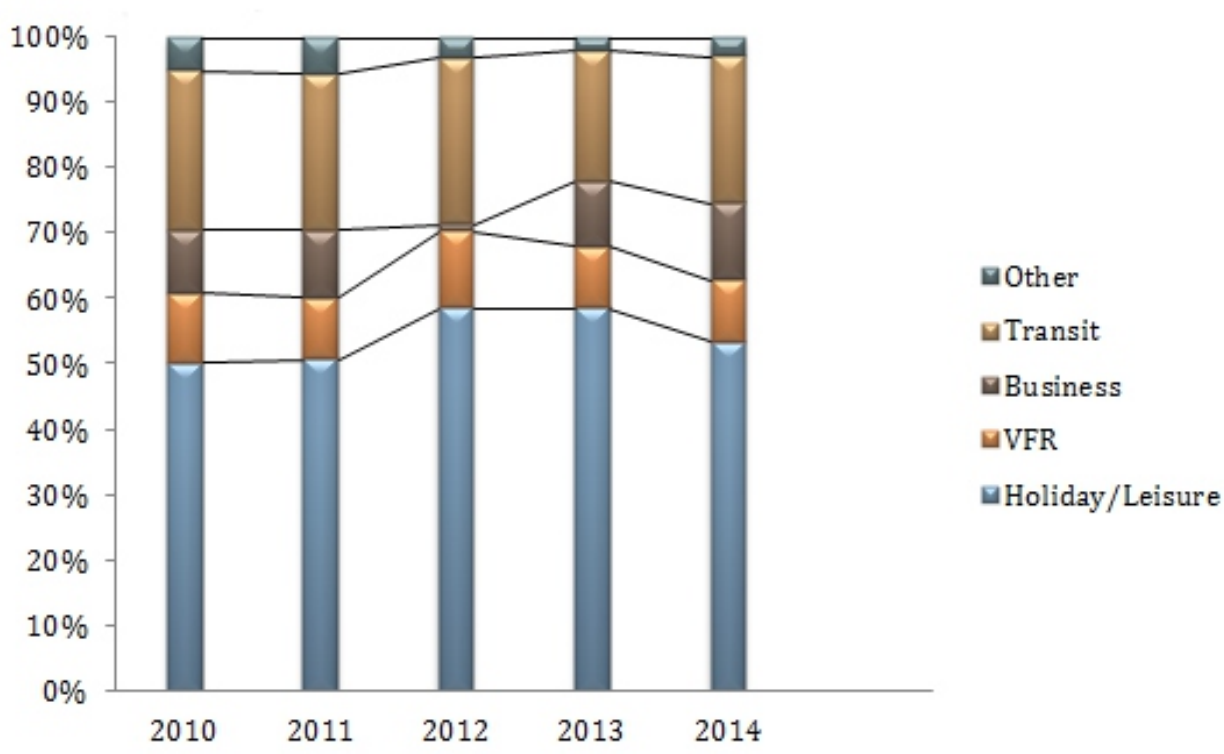


More than half of visitors to Swaziland in 2014 cited 'Holiday' as the main purpose of their visit. the most popular activities for these leisure seekers included wildlife (91.5%), adventure sports (86.5%) and hiking (88.7%).

Business travellers accounted for 11.7 percent of total visits during this period registering an increase of 1.5 percent when compared to 2013. Travellers citing 'Business' as the main reason for their visit predominantly came from RSA (16.1%) , USA (17.3%), as well as a the UK (10.3%).

Visiting Friends and Relatives (VFR) segment accounted for 9.4 percent of total arrivals with minimum variation from the 9.5 percent recorded in the previous year. In spite of accounting for the least, share visitors travelling mainly for this purpose recorded the second highest repeater rate with over 33 percent visiting more than two times during 2014.

Main Purpose of Visit 2010- 2014



Source: Exit Survey 2014, Swaziland Tourism Authority

5

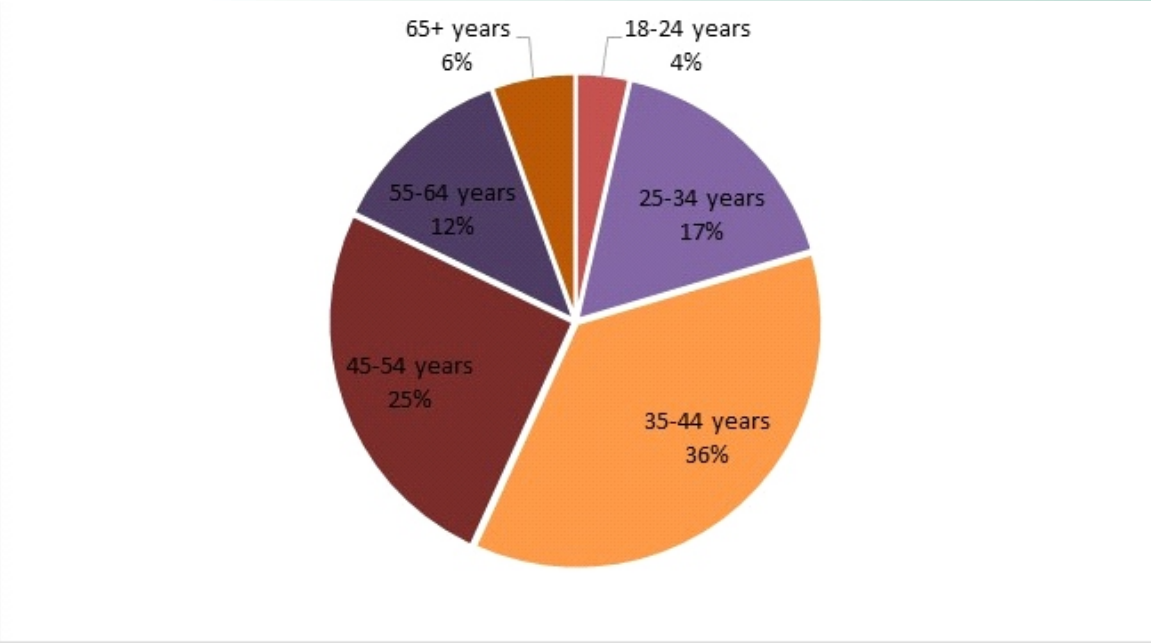
Age Group

- A majority of visitors in 35-44 years category
- over 49% of European visitors the 35-54 age bracket
- African visitors mainly in the 35-44 group



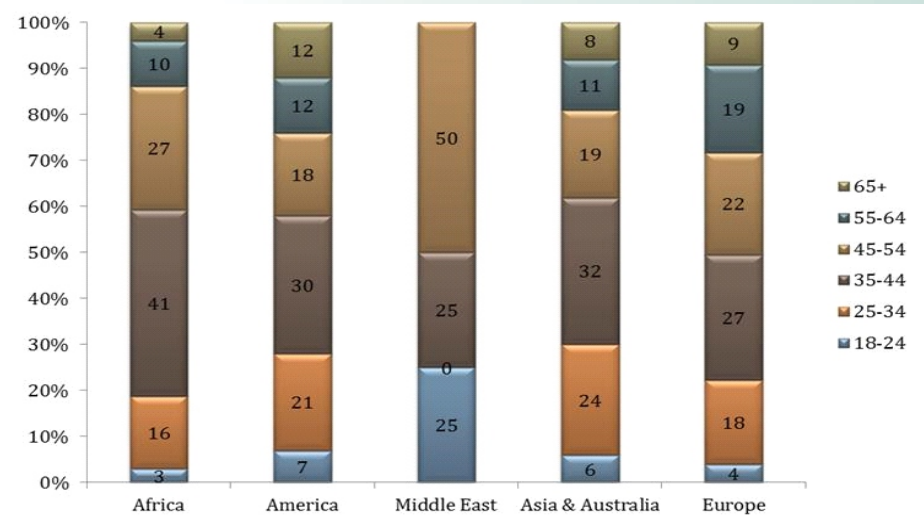
During the year, the Kingdom was mainly visited by travellers within the 35-44 age bracket accounting for 33.7 percent of total arrivals. Also significant in terms of the numbers were the 45-54 years (28.5%) and 25-34 (16.9%) categories.

International Arrivals by Age Group, 2014



Source: Exit Survey 2014, Swaziland Tourism Authority

International Arrivals by Region and Age Group, 2014



Source: Exit Survey 2014, Swaziland Tourism Authority

In terms of world region representation, visitors from the Americas and Africa tended to fall within the 35-44 years age category. European travellers, particularly from the Western European markets were mainly in the ‘mature’ category with 41 percent being in the 45-64 age category. Similar to Africa, a majority of visitations from the Middle East and Asia and the Pacific were in the 35-44 age bracket.

6

Length of Stay

- Average number of nights spent fell by 0.5 nights
- A marginal increase in total nights was noted
- American visitors spent the highest number of nights in 2014



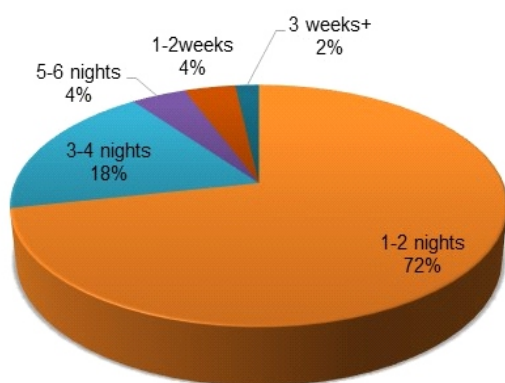
Visitations to Swaziland by international visitors were predominantly short stays with 70.9 percent of the visitors staying for an average of 3.1 nights or less in 2014. The majority of visitors stayed for 1 night (25.9 percent), with 24.5 percent staying for 2 nights while 20.5 percent stayed for 3+ nights. Int terms of total visitor nights, a total of 2 928 115 nights was recorded in 2014 reflecting a slight growth from 2 592 458 registered the previous year.

As in previous years, Americans spent the most number of nights registering an average length of stay of 4.0 nights in 2014.



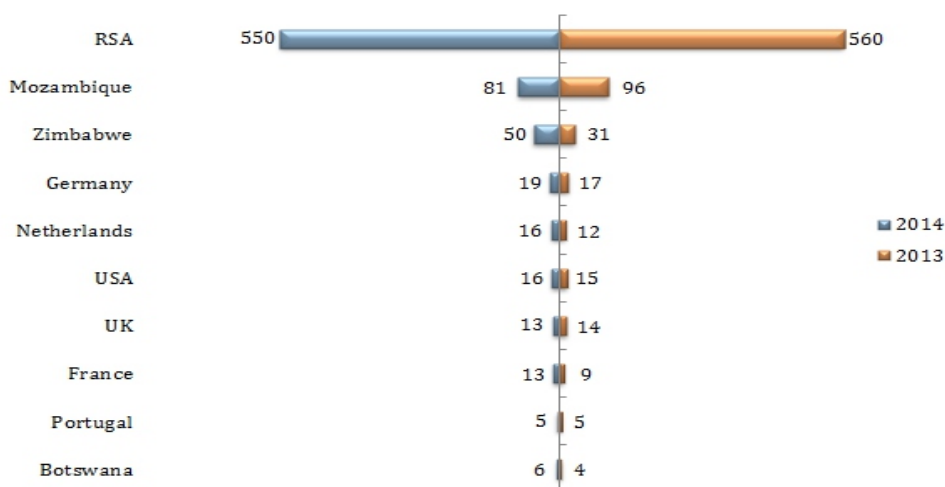
A relatively new development worth nothing is the increasing trend of lengthy stays by visitors from Sub-Saharan markets such as Tanzania and Kenya attending training courses.

Duration of Stay, 2014



Source: Exit Survey 2014, Swaziland Tourism Authority

Night Spent By Major Source Markets, 2013, 2014

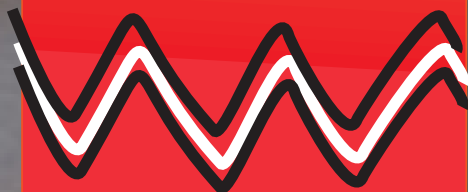


Source: Exit Survey 2014, Swaziland Tourism Authority

7

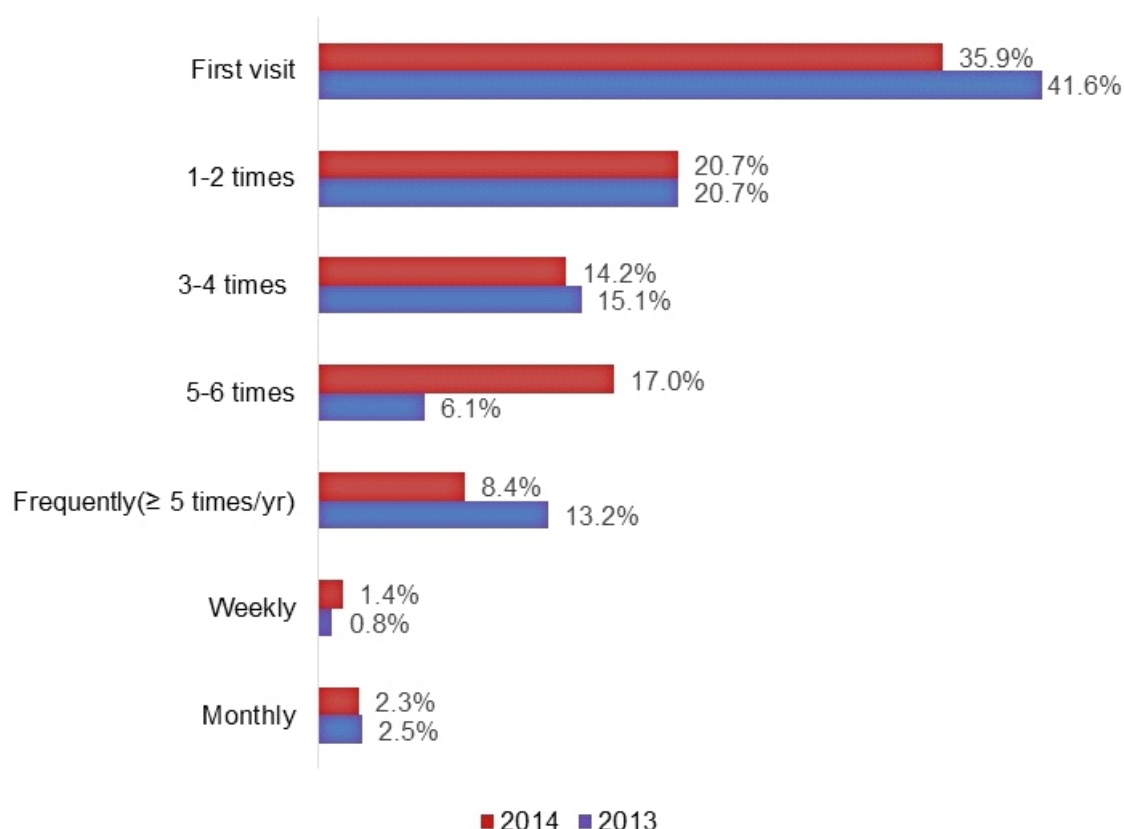
REPEAT VISITS

- Long -haul first time visits accounted for 35 percent of total long-haul arrivals
- Repeat visits were up by 5.6% in 2014
- Three out of five South African travelers were repeat visitor



International leisure travellers were mostly first-time visitors to Swaziland accounting for 35.9 percent of total visitor figures in 2014. About 20.7 percent of visitors indicated they had visited the country on two previous occasions, while 14.2 percent were on their third repeat visit.

Repeat Visitors 2013- 2014



Source: Exit Survey 2014, Swaziland Tourism Authority

As expected, repeat visitations amongst regional travellers had a higher proportion in comparison to overseas visitors. Over a fifth of visitor from the region stated to have made 3-4 previous visits to Swaziland with another 35.0 percent having made more than 5 visits to the Kingdom. A cross-tabulation between 'Repeat Visitation Patterns' and 'Purpose of Visit' indicated that business travellers had a higher repeat visit rate with this segment recording an average of 4 visits in 2014.

8

ACCOMMODATION PERFORMANCE

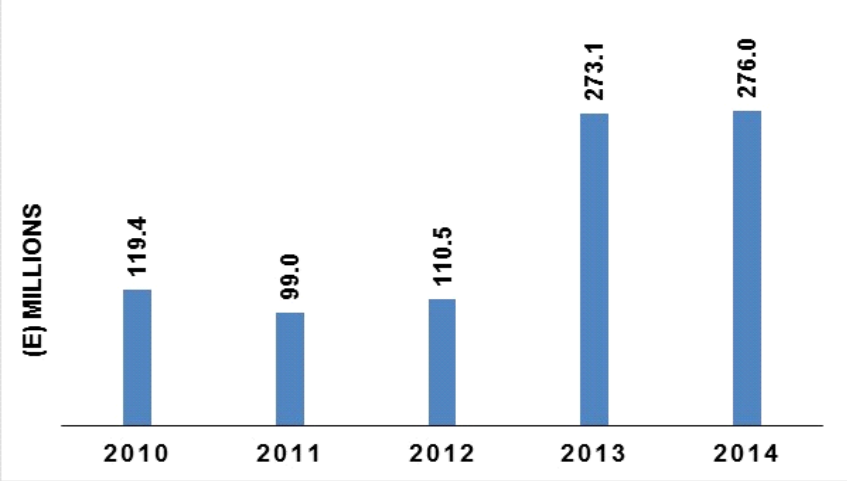
- Total accommodation bill in 2014 amounted to E276 million
- Room occupancy was down by 2%
- Both domestic and international overnight guests registered growth



In 2014, a total of 137 accommodation establishments were recorded to be in operation providing a total capacity of 2 650 rooms. During this period the lodging sector generated an occupancy rate of 44.7 percent, a 2.1 percent decline year-on-year comparisons. Despite the fall in occupancy rates, total accommodation revenue increased to E 276.0 million from E273.1 million in 2013 as a result of growth in the number of over night guests .

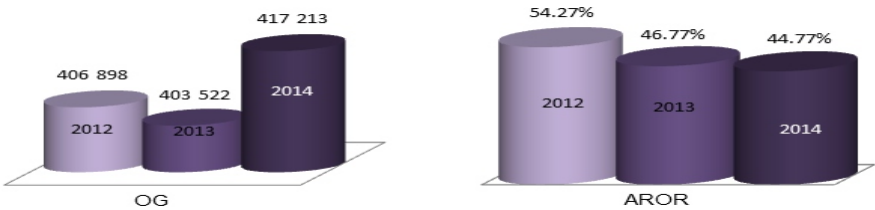
International visitors accounted for 73.6 percent of all lodging sales with domestic overnight stays accounting for the remaining 26.4 percent. During the same period, the average length of stay for overseas hotel guests was 1.2 nights

Total Revenue of Formal Accommodation (E'000.000)



Source: Monthly Accommodation Survey, Central Statistics Office

Overnight Guests/ Average Room Occupancy Rate, 2012- 2014



Revenue Per Person Per Night, 2012- 2014



Source: Monthly Accommodation Survey, Central Statistics Office

with an average party size of 4 travellers. 26.3 percent of all international business travellers spent one night in formal accommodation, while 13.7 percent spent two nights and 38.1 percent spent three or more nights in 2014.

The main purposes of trips for these visitors was leisure/ holiday (71.8 %), while business accounted for 12.9 percent of overseas overnight stays. These visitors mainly travelled by road using packaged tour coaches (6.1 %), rented vehicles (26.0 %), private vehicles (50.0 %) and air travel accounted for 11.1 percent during this period.

9

TRAVEL PARTNERSHIP

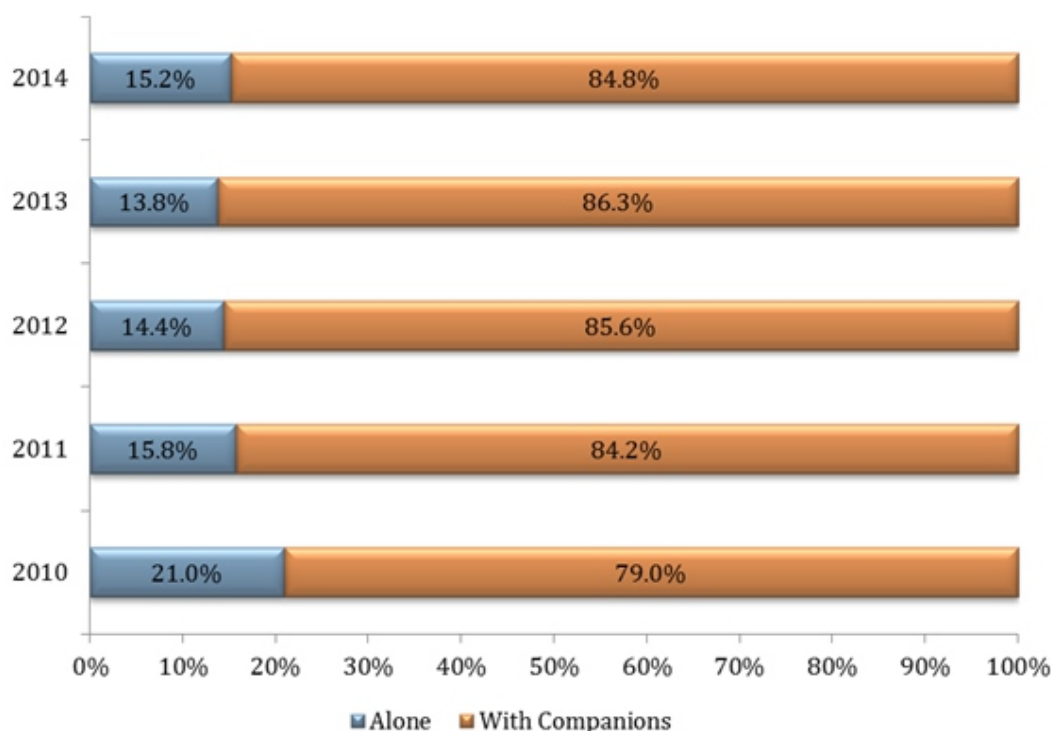
- Close to a third visitors travelled as couples
- Packaged tour travellers were down by 5.4%
- Most visitors from SADC travelled as families



Whilst the composition of the visitors' travel party was distributed almost equally across all categories, the dominant segment remained 'couples' with 29.8 percent share. Visitors travelling as 'A Family' were closely followed by 'Friends and Relatives' with 21.3 percent and 21.0 percent respectively. Only 15.2 percent travelled 'As Individual Travellers'.

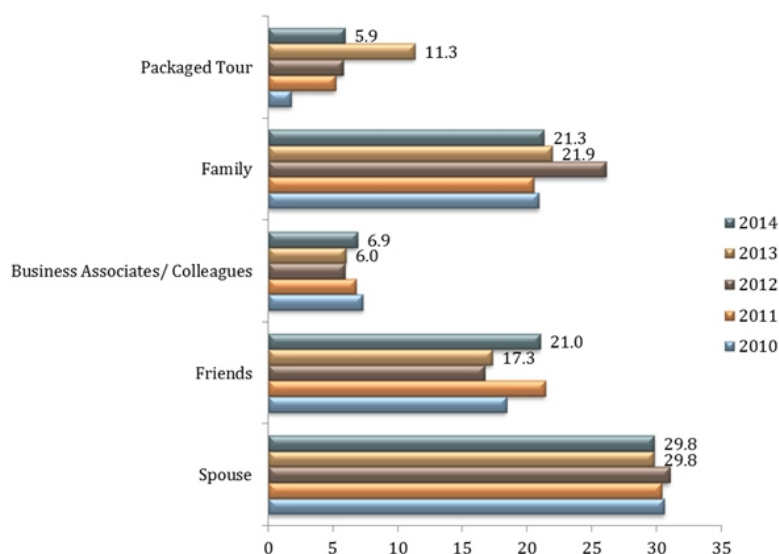
A cross-tabulation analysis between travel partnership and source markets revealed that over 80 percent of packaged tour travellers were mainly from Germany, UK, Netherlands and France.

Travel Partnership 2010-2014



Source: Exit Survey 2014 Swaziland Tourism Authority

Visitors with Travel Companions, 2010- 2014



In terms of family travel, one in five visitors in 2014 was in the company of family. As a result, family travel ranked second in terms of the travel companionship category.

Travel with friends with friends also accounted for a significant proportion with travellers from neighboring markets in RSA and Mozambique topping the charts in this regard.

10

Activities

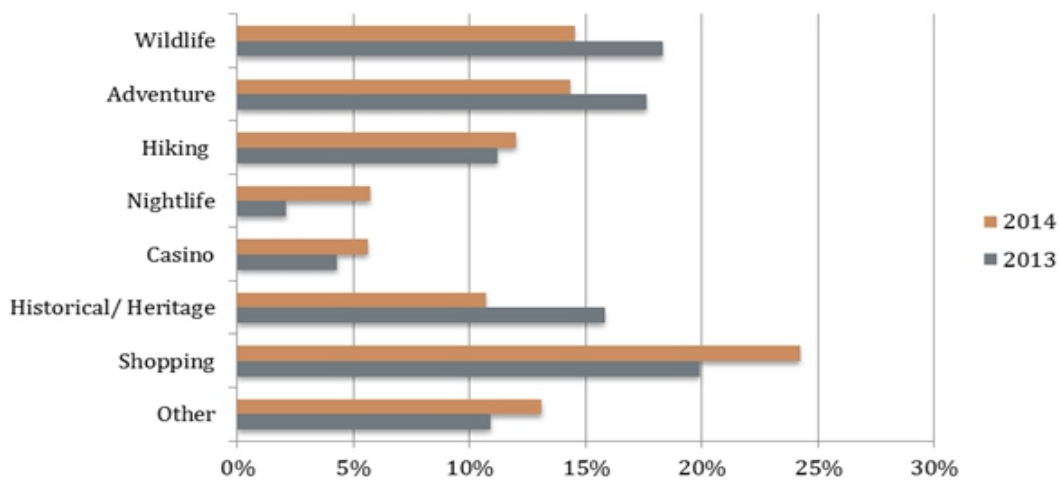
- The most popular activities in 2014 were nature-based
- All attraction sites post healthy growth in terms of visitations
- Visits to community based tourism sites increased by 64.7%%



Nature based activities accounted for the largest share of activities by visitors in 2014 with over 40 percent of travellers engaged in this form of activities. These included game viewing (14.5%) and hiking (12.0%). Other popular activities were culture/heritage (10.7%) and extreme adventure sports (14.3%).

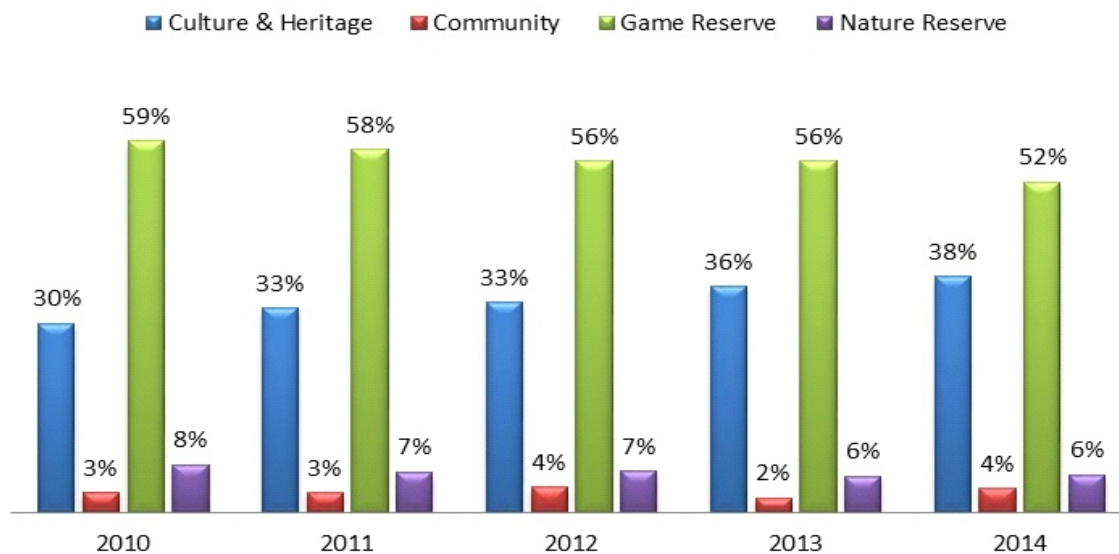


Activities Engaged In 2013- 2014



Source: Exit Survey 2014 Swaziland Tourism Authority

Visited Attraction Sites , 2010-2014



Source: Day Visitor Survey 2014, Swaziland Tourism Authority

11

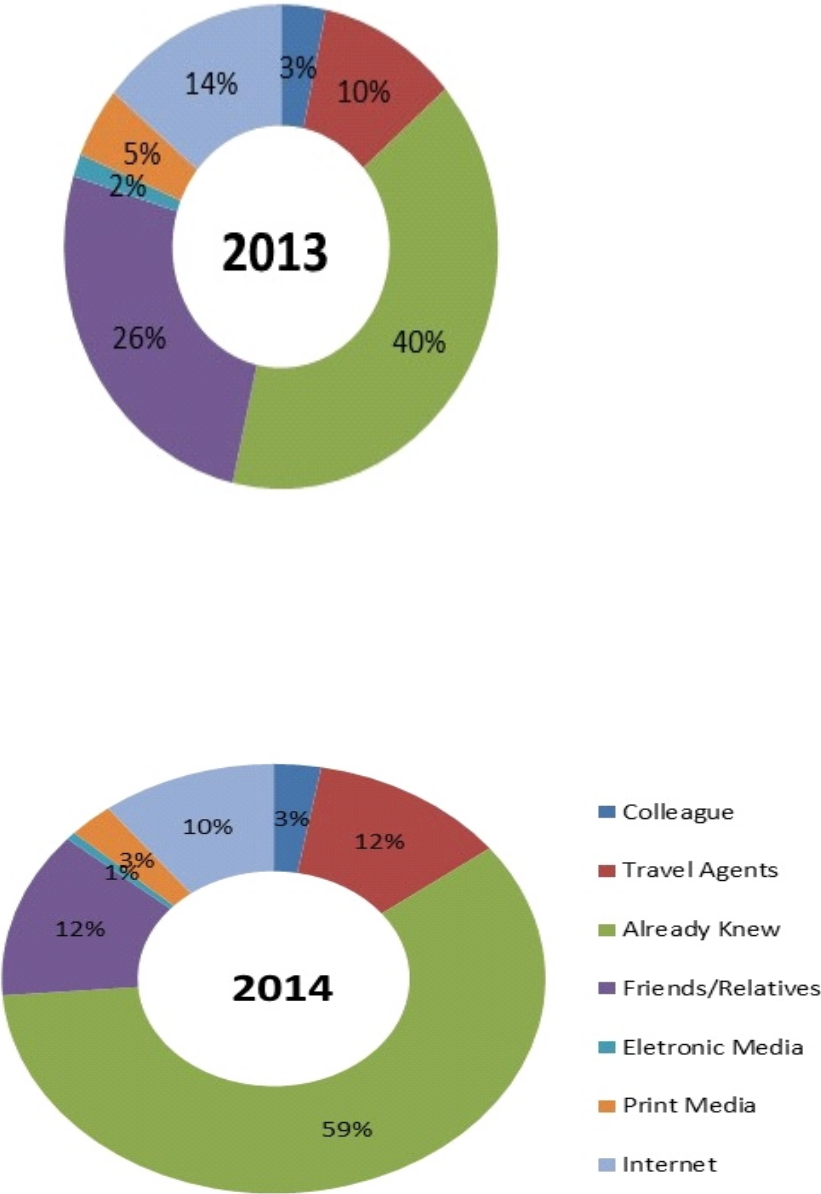
Channels of Information

- Friends and relatives remained the main source of information
- There was a sharp increase in colleagues as a primary source of travel information



The most common source of information about Swaziland for international visitors remained word of mouth 26 percent) through friends/relatives and colleagues. This source was closely followed by the internet (10.4%) an travel agents (11.8%). Print and electronic media reflect a decline from 4.7 percent in 2013 to 2.7 percent in 2014.

Main Sources of Information, 2013- 2014



Source: Exit Survey 2014 Swaziland Tourism Authority

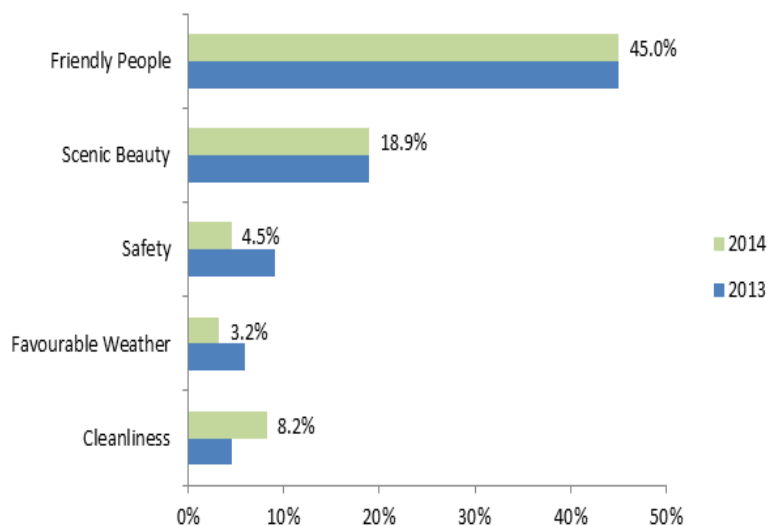
12

Opinions and Perspectives



The status of Swaziland as a Monarchy with a unique culture was noted as one of the major draw cards for international visitors. As such, visitors rated 'Warm People' (45.0%) and 'Beautiful Scenery' (18.9%) as the top of highlights. Other positive experiences related to 'Cleanliness' and 'Peaceful and Safe' accounting for 8.2 percent and 4.5 percent, respectively.

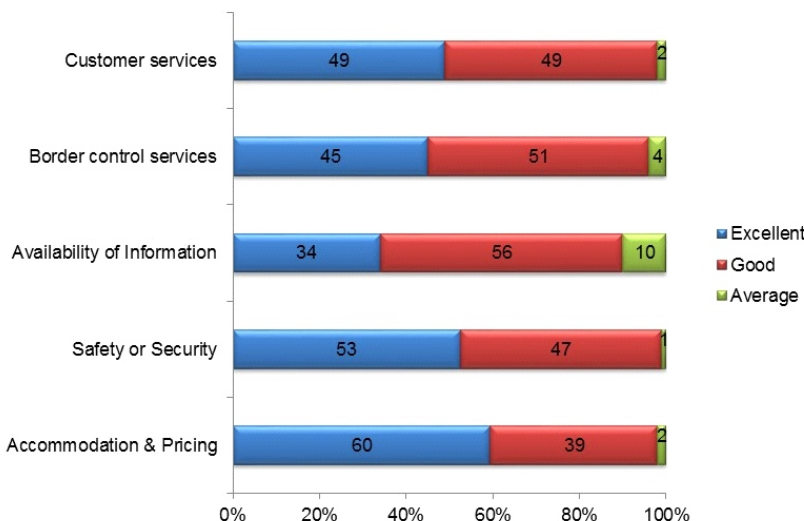
Visitor Highlights, 2013-2014



Source: Exit Survey 2014, Swaziland Tourism Authority

This year's evaluation of the 'Availability of Visitor information' in Swaziland showed improvement relative to last year as 34.8 percent and 57.1 percent said information availability was excellent and good, respectively. Most visitors were satisfied with the quality of their accommodation with a minority reporting dissatisfaction on the quality of hotels.

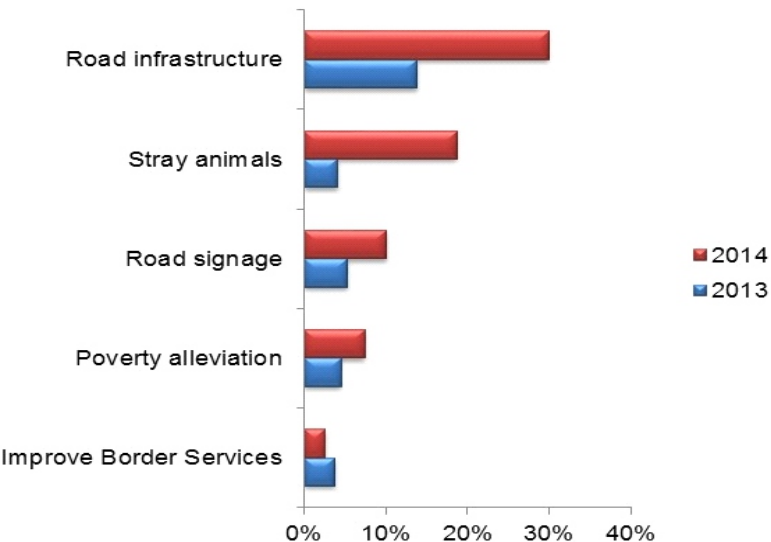
Rating For Visitor Satisfaction



Source: Exit Survey 2014, Swaziland Tourism Authority

Of total international arrivals, 4.1 percent indicated that some aspects of their Swaziland experience could be improved in the future. Of this figure, a majority (40.4 percent) expressed dissatisfaction with the condition of inner city road mainly citing the potholes as unsafe. Similarly, visitors complained about the lack or poorly maintained public restroom facilities particularly at border posts and along freeways.

Problems Encountered



Source: Exit Survey 2014, Swaziland Tourism Authority

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International Visitor Arrivals

Swaziland Tourism Statistics 2014 - Arrivals by country													
COUNTRY OF RESIDENCE	JAN 14	FEB 14	MAR 14	APR 14	MAY 14	JUNE 14	JULY 14	AUG 14	SEPT 14	OCT 14	NOV 14	DEC 14	TOTAL
AFRICA	112 538	81 614	97 560	107 309	92 387	93 715	101 815	101 144	88 297	83 187	93 619	124 630	1 177 815
Botswana	291	348	831	352	269	460	543	405	436	378	1 005	595	5 913
Kenya	129	117	148	170	131	133	134	134	154	147	143	191	1 731
Lesotho	223	200	1 120	462	249	409	601	454	298	527	553	457	5 554
Malawi	319	309	344	367	315	345	390	463	434	424	466	583	4 760
Mozambique	22 065	18 247	17 011	19 331	18 144	14 713	16 304	19 069	16 910	16 032	19 153	22 574	219 555
Nigeria	253	267	260	265	302	276	321	341	291	277	344	339	3 537
RSA	84 288	56 732	72 194	80 564	66 839	71 646	77 317	72 809	62 561	58 381	63 438	89 721	856 492
Tanzania	344	444	537	496	440	391	574	506	423	433	558	571	5 718
Zambia	511	431	412	395	474	405	447	562	372	355	464	629	5 458
Zimbabwe	3 230	3 727	3 789	3 961	4 276	4 111	4 314	5 547	5 628	5 547	6 602	7 892	58 624
Other Africa	884	793	912	946	949	825	869	852	791	686	890	1 077	10 473
NORTH & SOUTH AMERICA	1 508	1 372	1 773	1 610	2 333	2 485	2 381	1 991	1 674	1 935	2 030	1 594	22 685
Brazil	91	96	57	87	84	126	51	57	109	79	71	65	974
Canada	211	226	328	209	342	267	230	193	251	406	584	222	3 470
USA	1 123	991	1 334	1 254	1 807	1 990	2 032	1 646	1 259	1 386	1 312	1 225	17 359
Other America	82	60	54	60	99	103	68	95	55	64	62	82	883
MIDDLE EAST	113	105	95	70	55	68	67	98	95	144	91	126	1 126
Kuwait	2	3	9	1	2	6	1	0	5	2	5	5	42
Iran	5	4	9	11	12	4	0	7	9	6	7	12	87
Israel	90	94	67	47	31	40	61	72	67	128	59	77	833
Saudi Arabia	0	0	0	0	0	1	0	0	0	1	0	2	4
UAE	1	0	0	0	4	2	0	4	4	1	0	7	24
Other Mid East	15	4	10	11	6	15	5	14	9	6	19	22	137
ASIA & AUSTRALIA	1 855	1 774	1 573	1 927	1 879	1 647	1 937	2 234	2 098	1 656	1 861	2 247	22 688
Australia	283	219	148	253	442	256	499	509	500	291	193	186	3 779
China	198	152	180	187	176	120	135	176	175	167	151	230	2 046
India	403	509	348	499	370	369	311	406	387	332	539	556	5 031
Pakistan	367	340	326	345	300	312	316	390	404	290	394	457	4 242
Philippines	22	37	31	42	52	15	15	37	55	24	48	106	484
South Korea	206	135	168	169	171	201	229	231	130	141	194	183	2 158
Taiwan	77	92	112	116	59	83	159	142	106	119	95	107	1 268
Other Asia	298	289	259	317	308	291	271	343	341	292	247	422	3 680
EUROPE	6 172	8 143	8 394	7 276	5 302	4 386	8 446	12 057	7 494	11 550	13 568	7 518	100 308
Belgium	175	227	262	327	157	118	712	550	368	689	615	324	4 524
France	599	917	1 233	775	779	380	1 088	1 887	679	1 863	2 896	1 056	14 152
Germany	1 239	2 164	2 214	1 818	1 004	790	910	1 911	2 037	2 879	3 304	1 398	21 669
Italy	277	189	195	261	148	174	249	1 218	226	230	201	238	3 605
Netherlands	823	1 153	941	918	838	543	2 671	2 851	1 615	2 258	2 085	1 178	17 874
Norway	65	124	148	88	51	46	88	32	39	86	115	65	946
Portugal	516	609	580	715	554	614	425	610	580	427	567	522	6 720
Sweden	298	267	236	132	68	76	41	58	42	178	333	386	2 115
Switzerland	282	347	223	307	132	99	224	157	240	516	550	231	3 307
UK	1 208	1 344	1 515	1 358	1 092	1 125	1 373	1 779	1 072	1 436	1 478	1 032	15 813
Other Europe	690	801	847	577	479	421	664	1 005	597	989	1 424	1 089	9 583
GRAND TOTAL	122 186	93 008	109 395	118 192	101 955	102 302	114 645	117 524	99 657	98 473	111 169	136 115	1 324 621

STATISTICAL TABLE

ANNUAL REPORT ON TOURISM STATISTICS 2014

ANNUAL SUMMARY OF CHARACTERISTICS OF VISITOR ARRIVALS FROM SELECTED MARKETS, 2014

CHARACTERISTICS	AFRICA								
	Botswana			Kenya			Lesotho		
	NO.	%	%CHG	NO.	%	%CHG	NO.	%	%CHG
MODE OF TRAVEL	5 913	100.0%	37.7%	1 731	100.0%	-11.0%	5 554	100.0%	52.9%
Air	609	10.3%	-58.5%	820	47.4%	-15.6%	161	2.9%	-71.2%
Land	5 304	89.7%	87.8%	911	52.6%	-6.4%	5 393	97.1%	75.5%
GENDER	5 913	100.0%	37.7%	1 731	100.0%	-11.0%	5 554	100.0%	52.9%
Male	3 631	61.4%	25.1%	1 587	91.7%	-2.0%	2 694	48.5%	27.2%
Female	2 282	38.6%	64.1%	144	8.3%	-55.8%	2 860	51.5%	88.9%
AGE GROUP	5 913	100.0%	37.7%	1 731	100.0%	-11.0%	5 554	100.0%	52.9%
18-24	313	5.3%	151.7%	0	0.0%	0.0%	505	9.1%	67.7%
25-34	2 282	38.6%	210.9%	289	16.7%	-	1 683	30.3%	85.3%
35-44	2 696	45.6%	10.0%	576	33.3%	-55.6%	2 355	42.4%	55.5%
45-54	621	10.5%	1.1%	576	33.3%	77.5%	1 011	18.2%	66.7%
55-64	0	0.0%	0.0%	289	16.7%	-10.5%	0	0.0%	-100.0%
65+	0	0.0%	0.0%	0	0.0%	0.0%	0	0.0%	0.0%
LENGTH OF DAYS	5 913	100.0%	37.7%	1 731	100.0%	-11.0%	5 554	100.0%	52.9%
Under 1 day	0	0.0%	-100.0%	145	8.4%	-55.2%	505	9.1%	-
1 Day	520	8.8%	-34.1%	0	0.0%	0.0%	505	9.1%	-
2 Days	2 578	43.6%	107.8%	145	8.4%	-85.0%	3 532	63.6%	80.8%
3 Days	1 141	19.3%	-8.0%	289	16.7%	-	505	9.1%	-39.8%
4 Days	106	1.8%	-	0	0.0%	0.0%	0	0.0%	-100.0%
5 Days	207	3.5%	-39.0%	144	8.3%	-55.8%	0	0.0%	-100.0%
6 Days	106	1.8%	-	433	25.0%	-	0	0.0%	-100.0%
7 Days	934	15.8%	737.0%	144	8.3%	-	0	0.0%	0.0%
8- 10 Days	106	1.8%	-4.6%	144	8.3%	-55.8%	0	0.0%	0.0%
11 -14 Days	106	1.8%	-4.6%	0	0.0%	0.0%	339	6.1%	-
15 - 29 Days	106	1.8%	-	144	8.3%	-	0	0.0%	0.0%
30- 59 Days	0	0.0%	0.0%	144	8.3%	-	167	3.0%	-
60 Days & Over	0	0.0%	-100.0%	0	0.0%	0.0%	0	0.0%	0.0%
Av. Length of Stay (Days)	3.7	-13.9		8.8	175.0		3.24	10.3	
Visitor Nights	21992	18.70%		15291	148.27%		18008	69.61%	

CHARACTERISTICS									
	Malawi			Mozambique			Nigeria		
	NO.	%	%CHG	NO.	%	%CHG	NO.	%	%CHG
MODE OF TRAVEL	4 760	100.0%	29.0%	219 555	100.0%	2.7%	3 537	100.0%	-0.8%
Air	1 985	41.7%	-19.3%	220	0.1%	2.7%	1 249	35.3%	5.1%
Land	2 775	58.3%	125.9%	219 335	99.9%	2.7%	2 288	64.7%	-3.8%
GENDER	4 760	100.0%	29.0%	219 555	100.0%	2.7%	3 537	100.0%	-0.8%
Male	3 489	73.3%	13.5%	155 006	70.6%	11.2%	3 095	87.5%	-2.4%
Female	1 271	26.7%	106.3%	64 549	29.4%	-13.3%	442	12.5%	11.7%
AGE GROUP	4 760	100.0%	29.0%	219 555	100.0%	2.7%	3 537	100.0%	-0.8%
18-24	633	13.3%	-	5 269	2.4%	-8.7%	0	0.0%	0.0%
25-34	319	6.7%	-48.2%	30 957	14.1%	-35.4%	665	18.8%	-58.0%
35-44	2 223	46.7%	81.0%	101 654	46.3%	17.4%	2 211	62.5%	39.6%
45-54	1 271	26.7%	106.3%	65 427	29.8%	5.5%	665	18.8%	66.4%
55-64	319	6.7%	-74.0%	10 978	5.0%	11.6%	0	0.0%	0.0%
65+	0	0.0%	0.0%	5 269	2.4%	208.0%	0	0.0%	0.0%
LENGTH OF DAYS	4 760	100.0%	29.0%	219 555	100.0%	2.7%	3 537	100.0%	-0.8%
Under 1 day	952	20.0%	54.5%	139 198	63.4%	18.8%	0	0.0%	0.0%
1 Day	0	0.0%	0.0%	32 714	14.9%	14.2%	442	12.5%	11.7%
2 Days	0	0.0%	0.0%	35 129	16.0%	-26.3%	1 549	43.8%	30.4%
3 Days	1 271	26.7%	106.3%	8 563	3.9%	-43.6%	223	6.3%	-71.9%
4 Days	319	6.7%	-	2 196	1.0%	-21.0%	442	12.5%	-
5 Days	633	13.3%	-	659	0.3%	-48.7%	0	0.0%	0.0%
6 Days	0	0.0%	0.0%	439	0.2%	-31.5%	223	6.3%	-
7 Days	0	0.0%	0.0%	439	0.2%	-	0	0.0%	0.0%
8- 10 Days	0	0.0%	0.0%	0	0.0%	0.0%	0	0.0%	-100.0%
11 -14 Days	633	13.3%	-	0	0.0%	-100.0%	219	6.2%	-
15 - 29 Days	319	6.7%	-87.0%	0	0.0%	0.0%	219	6.2%	-72.3%
30- 59 Days	633	13.3%	-	220	0.1%	-	0	0.0%	0.0%
60 Days & Over	0	0.0%	0.0%	0	0.0%	0.0%	219	6.2%	-
Av. Length of Stay (Days)	10.5	-32.1		0.7	-22.2		7.4	1.4	
Visitor Nights	50139	-14.04%		154 859	-20.48%		26306	0.56%	

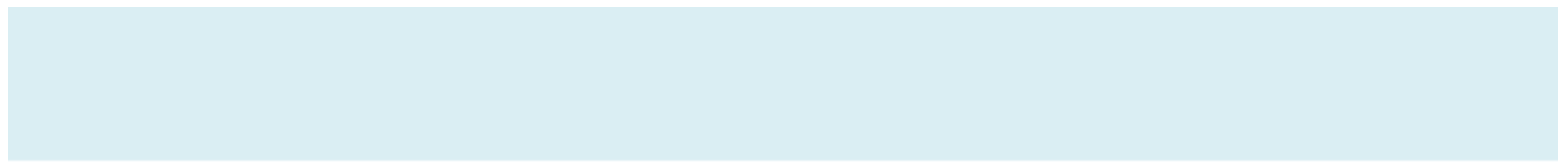


AFRICA											
RSA			Tanzania			Zambia			Zimbabwe		
NO.	%	%CHG	NO.	%	%CHG	NO.	%	%CHG	NO.	%	%CHG
856 492	100.0%	-2.2%	5 718	100.0%	-11.9%	5 458	100.0%	-16.5%	58 624	100.0%	49.3%
77 941	9.1%	48.4%	2 030	35.5%	-63.5%	1 899	34.8%	-41.9%	14 422	24.6%	14.8%
778 551	90.9%	-5.4%	3 688	64.5%	297.2%	3 559	65.2%	8.9%	44 202	75.4%	65.6%
856 492	100.0%	-2.2%	5 718	100.0%	-11.9%	5 458	100.0%	-16.5%	58 624	100.0%	49.3%
572 993	66.9%	-4.1%	3 991	69.8%	-12.7%	3 881	71.1%	18.8%	38 516	65.7%	36.3%
283 499	33.1%	1.8%	1 727	30.2%	-10.2%	1 577	28.9%	-51.7%	20 108	34.3%	83.0%
856 492	100.0%	-2.2%	5 718	100.0%	-11.9%	5 458	100.0%	-16.5%	58 624	100.0%	49.3%
24 838	2.9%	-53.5%	0	0.0%	-100.0%	0	0.0%	0.0%	2 228	3.8%	41.9%
131 043	15.3%	-15.0%	932	16.3%	-25.2%	862	15.8%	-31.3%	17 294	29.5%	120.3%
334 888	39.1%	5.9%	2 659	46.5%	52.2%	3 591	65.8%	19.0%	26 791	45.7%	42.2%
234 679	27.4%	-5.3%	1 727	30.2%	-13.7%	573	10.5%	-67.4%	11 725	20.0%	24.5%
96 784	11.3%	17.6%	269	4.7%	-64.3%	431	7.9%	-14.3%	586	1.0%	-62.7%
34 260	4.0%	56.5%	132	2.3%	-	0	0.0%	0.0%	0	0.0%	0.0%
856 492	100.0%	-2.2%	5 718	100.0%	-11.9%	5 458	100.0%	-16.5%	58 624	100.0%	49.3%
306 624	35.8%	-2.5%	0	0.0%	-100.0%	142	2.6%	-69.4%	8 383	14.3%	6.8%
162 733	19.0%	8.7%	269	4.7%	15.0%	862	15.8%	23.3%	7 797	13.3%	65.5%
227 827	26.6%	-3.6%	663	11.6%	-4.5%	720	13.2%	-22.9%	7 269	12.4%	-7.4%
79 654	9.3%	-13.4%	532	9.3%	-	1 004	18.4%	-38.5%	5 569	9.5%	-29.1%
30 834	3.6%	-14.1%	532	9.3%	127.5%	573	10.5%	23.5%	7 797	13.3%	396.6%
17 130	2.0%	3.0%	801	14.0%	-	431	7.9%	-7.1%	5 042	8.6%	221.1%
6 852	0.8%	-13.1%	663	11.6%	183.8%	289	5.3%	-	2 814	4.8%	-
6 852	0.8%	30.4%	132	2.3%	-71.5%	142	2.6%	-39.7%	3 928	6.7%	-
7 708	0.9%	-2.2%	400	7.0%	-13.2%	142	2.6%	-	1 700	2.9%	-63.9%
3 426	0.4%	-21.7%	801	14.0%	-71.3%	289	5.3%	-59.0%	2 814	4.8%	-
3 426	0.4%	-2.2%	663	11.6%	-5.4%	431	7.9%	-38.9%	3 928	6.7%	25.1%
2 569	0.3%	193.4%	263	4.6%	-44.5%	431	7.9%	83.3%	1 583	2.7%	-
856	0.1%	-	0	0.0%	0.0%	0	0.0%	0.0%	0	0.0%	0.0%
1.8	5.9		8.47	-28.2		8.1	19.3		5.5	45.0	
1507709	0.40%		48404	-36.55%		44239	-0.78%		323269	114.46%	

CHARACTERISTICS	AMERICA								
	Brazil			Canada			USA		
	NO.	%	%CHG	NO.	%	%CHG	NO.	%	%CHG
MODE OF TRAVEL	974	100.0%	-7.1%	3 470	100.0%	7.6%	17 359	100.0%	9.8%
Air	0	0.0%	-100.0%	319	9.2%	421.0%	3 767	21.7%	77.7%
Land	974	100.0%	27.8%	3 151	90.8%	-0.4%	13 592	78.3%	-0.8%
GENDER	974	100.0%	-7.1%	3 470	100.0%	7.6%	17 359	100.0%	9.8%
Male	811	83.3%	21.7%	1 620	46.7%	11.2%	9 009	51.9%	11.0%
Female	163	16.7%	-57.4%	1 850	53.3%	4.7%	8 350	48.1%	8.4%
AGE GROUP	974	100.0%	-7.1%	3 470	100.0%	7.6%	17 359	100.0%	9.8%
18-24	163	16.7%	-14.7%	184	5.3%	-12.3%	1 267	7.3%	-12.0%
25-34	487	50.0%	155.3%	510	14.7%	7.6%	3 784	21.8%	39.1%
35-44	0	0.0%	-100.0%	600	17.3%	-30.8%	5 659	32.6%	44.3%
45-54	324	33.3%	-	600	17.3%	-35.4%	3 194	18.4%	-27.6%
55-64	0	0.0%	-100.0%	926	26.7%	35.5%	1 597	9.2%	-35.7%
65+	0	0.0%	0.0%	649	18.7%	959.0%	1 875	10.8%	123.7%
LENGTH OF DAYS	974	100.0%	-7.1%	3 470	100.0%	7.6%	17 359	100.0%	9.8%
Under 1 day	324	33.3%	240.1%	94	2.7%	16.2%	1 267	7.3%	142.8%
1 Day	324	33.3%	-15.0%	1 943	56.0%	12.6%	3 854	22.2%	-4.1%
2 Days	0	0.0%	0.0%	600	17.3%	-22.1%	4 895	28.2%	9.8%
3 Days	0	0.0%	-100.0%	139	4.0%	-59.8%	2 135	12.3%	7.1%
4 Days	0	0.0%	0.0%	94	2.7%	123.5%	1 545	8.9%	80.9%
5 Days	163	16.7%	-	139	4.0%	126.5%	712	4.1%	9.8%
6 Days	0	0.0%	0.0%	45	1.3%	-	660	3.8%	81.3%
7 Days	0	0.0%	-100.0%	0	0.0%	-100.0%	278	1.6%	-32.5%
8- 10 Days	163	16.7%	70.6%	45	1.3%	16.6%	434	2.5%	-50.1%
11 -14 Days	0	0.0%	0.0%	139	4.0%	514.8%	434	2.5%	-51.9%
15 - 29 Days	0	0.0%	-100.0%	94	2.7%	16.2%	989	5.7%	45.5%
30- 59 Days	0	0.0%	0.0%	139	4.0%	617.3%	104	0.6%	-5.9%
60 Days & Over	0	0.0%	0.0%	0	0.0%	-100.0%	52	0.3%	-
Av. Length of Stay (Days)	2.7		-44.4	3.7		14.7	4.8		6.7
Visitor Nights	2597		-48.56%	12723		23.96%	83993		18.08%



CHARACTERISTICS	MIDDLE EAST/ASIA & AUSTRALASIA								
	Israel			Australia			China		
	NO.	%	%CHG	NO.	%	%CHG	NO.	%	%CHG
MODE OF TRAVEL	833	100.0%	-14.1%	3 779	100.0%	7.1%	2 046	100.0%	-6.3%
Air	0	0.0%	0.0%	582	15.4%	649.6%	681	33.3%	164.4%
Land	833	100.0%	-14.1%	3 197	84.6%	-7.4%	1 365	66.7%	-29.2%
GENDER	833	100.0%	-14.1%	3 779	100.0%	7.1%	2 046	100.0%	-6.3%
Male	417	50.0%	-14.1%	1 674	44.3%	-7.2%	1 138	55.6%	-26.2%
Female	417	50.0%	-14.1%	2 105	55.7%	22.0%	908	44.4%	41.5%
AGE GROUP	833	100.0%	-14.1%	3 779	100.0%	7.1%	2 046	100.0%	-6.3%
18-24	208	25.0%	411.2%	0	0.0%	-100.0%	115	5.6%	-
25-34	0	0.0%	-100.0%	805	21.3%	24.0%	1 023	50.0%	50.1%
35-44	208	25.0%	-53.1%	744	19.7%	-8.3%	569	27.8%	-40.5%
45-54	417	50.0%	13.6%	869	23.0%	7.1%	227	11.1%	-44.7%
55-64	0	0.0%	-100.0%	805	21.3%	32.6%	115	5.6%	-15.4%
65+	0	0.0%	0.0%	559	14.8%	366.1%	0	0.0%	0.0%
LENGTH OF DAYS	833	100.0%	-14.1%	3 779	100.0%	7.1%	2 046	100.0%	-6.3%
Under 1 day	0	0.0%	-100.0%	208	5.5%	-25.4%	0	0.0%	-100.0%
1 Day	208	25.0%	-60.4%	1 032	27.3%	-33.3%	342	16.7%	-16.8%
2 Days	0	0.0%	-100.0%	1 270	33.6%	10.4%	796	38.9%	-2.8%
3 Days	208	25.0%	28.6%	586	15.5%	196.4%	454	22.2%	-16.8%
4 Days	0	0.0%	0.0%	276	7.3%	129.9%	115	5.6%	-
5 Days	208	25.0%	-	34	0.9%	-12.4%	115	5.6%	-
6 Days	0	0.0%	-100.0%	102	2.7%	-	113	5.5%	-18.2%
7 Days	0	0.0%	0.0%	34	0.9%	-12.4%	0	0.0%	0.0%
8- 10 Days	208	25.0%	-	0	0.0%	0.0%	0	0.0%	0.0%
11 -14 Days	0	0.0%	0.0%	102	2.7%	-35.7%	0	0.0%	0.0%
15 - 29 Days	0	0.0%	0.0%	136	3.6%	-	113	5.5%	-
30- 59 Days	0	0.0%	0.0%	0	0.0%	0.0%	0	0.0%	0.0%
60 Days & Over	0	0.0%	0.0%	0	0.0%	0.0%	0	0.0%	0.0%
Av. Length of Stay (Days)	4.7	170.6		2.2	-8.3		3.4	61.9	
Visitor Nights	3957	138.80%		8363	-1.44%		6934	53.92%	



ASIA & AUSTRALIA/ EUROPE

CHARACTERISTICS	ASIA & AUSTRALIA/ EUROPE											
	India			Pakistan			Taiwan			Belgium		
	NO.	%	%CHG	NO.	%	%CHG	NO.	%	%CHG	NO.	%	%CHG
MODE OF TRAVEL	5 031	100.0%	9.1%	4 242	100.0%	2.8%	1 268	100.0%	16.0%	4 524	100.0%	24.4%
Air	1 887	37.5%	-48.9%	445	10.5%	-78.4%	159	12.5%	-61.3%	140	3.1%	42.8%
Land	3 144	62.5%	240.8%	3 797	89.5%	84.1%	1 110	87.5%	62.4%	4 384	96.9%	23.9%
GENDER	5 031	100.0%	9.1%	4 242	100.0%	2.8%	1 268	100.0%	16.0%	4 524	100.0%	24.4%
Male	3 356	66.7%	-19.2%	3 771	88.9%	-8.6%	951	75.0%	74.0%	2 628	58.1%	65.0%
Female	1 675	33.3%	263.2%	471	11.1%	-	317	25.0%	-42.0%	1 896	41.9%	-7.3%
AGE GROUP	5 031	100.0%	9.1%	4 242	100.0%	2.8%	1 268	100.0%	16.0%	4 524	100.0%	24.4%
18-24	1 675	33.3%	263.2%	471	11.1%	-	159	12.5%	-42.0%	511	11.3%	142.3%
25-34	840	16.7%	-8.9%	708	16.7%	-65.7%	317	25.0%	132.0%	1 022	22.6%	109.8%
35-44	840	16.7%	-39.3%	2 121	50.0%	2.8%	793	62.5%	190.0%	1 240	27.4%	43.8%
45-54	1 675	33.3%	21.1%	942	22.2%	-	0	0.0%	-100.0%	801	17.7%	-36.0%
55-64	0	0.0%	-100.0%	0	0.0%	0.0%	0	0.0%	-100.0%	801	17.7%	0.5%
65+	0	0.0%	0.0%	0	0.0%	0.0%	0	0.0%	0.0%	149	3.3%	356.1%
LENGTH OF DAYS	5 031	100.0%	9.1%	4 242	100.0%	2.8%	1 268	100.0%	16.0%	4 524	100.0%	24.4%
Under 1 day	0	0.0%	0.0%	238	5.6%	-	0	0.0%	0.0%	656	14.5%	902.0%
1 Day	840	16.7%	64.1%	942	22.2%	-77.2%	159	12.5%	-71.0%	1 896	41.9%	-23.4%
2 Days	0	0.0%	-100.0%	1 650	38.9%	-	634	50.0%	-	1 384	30.6%	94.2%
3 Days	1 675	33.3%	-	0	0.0%	0.0%	0	0.0%	-100.0%	366	8.1%	273.2%
4 Days	840	16.7%	-	238	5.6%	-	317	25.0%	132.0%	72	1.6%	-54.8%
5 Days	0	0.0%	0.0%	471	11.1%	-	0	0.0%	0.0%	77	1.7%	428.6%
6 Days	0	0.0%	0.0%	0	0.0%	0.0%	159	12.5%	16.0%	0	0.0%	-100.0%
7 Days	0	0.0%	-100.0%	471	11.1%	-	0	0.0%	0.0%	0	0.0%	-100.0%
8- 10 Days	0	0.0%	-100.0%	0	0.0%	0.0%	0	0.0%	0.0%	0	0.0%	-100.0%
11-14 Days	0	0.0%	-100.0%	0	0.0%	0.0%	0	0.0%	-100.0%	0	0.0%	0.0%
15- 29 Days	840	16.7%	-	0	0.0%	0.0%	0	0.0%	0.0%	0	0.0%	-100.0%
30- 59 Days	835	16.6%	-	0	0.0%	0.0%	0	0.0%	0.0%	72	1.6%	895.1%
60 Days & Over	0	0.0%	0.0%	233	5.5%	-	0	0.0%	0.0%	0	0.0%	0.0%
Av. Length of Stay (Days)	11.5		49.4	12.8		11780.0	2.9		-17.1	1.9		5.6
Visitor Nights	57857		81.28%	54203		1214.0%	3646		-4.70%	8610		30.55%

CHARACTERISTICS	EUROPE								
	France			Germany			Italy		
	NO.	%	%CHG	NO.	%	%CHG	NO.	%	%CHG
MODE OF TRAVEL	14 152	100.0%	35.5%	21 669	100.0%	14.5%	3 605	100.0%	18.0%
Air	255	1.8%	-2.4%	650	3.0%	71.7%	141	3.9%	119.2%
Land	13 897	98.2%	36.5%	21 019	97.0%	13.3%	3 464	96.1%	15.9%
GENDER	14 152	100.0%	35.5%	21 669	100.0%	14.5%	3 605	100.0%	18.0%
Male	8 222	58.1%	39.8%	12 568	58.0%	13.1%	2 087	57.9%	27.8%
Female	5 930	41.9%	29.9%	9 101	42.0%	16.4%	1 518	42.1%	6.9%
AGE GROUP	14 152	100.0%	35.5%	21 669	100.0%	14.5%	3 605	100.0%	18.0%
18-24	269	1.9%	17.0%	802	3.7%	56.8%	94	2.6%	-12.3%
25-34	2 632	18.6%	37.0%	3 575	16.5%	32.1%	425	11.8%	-28.9%
35-44	4 217	29.8%	41.7%	6 284	29.0%	7.8%	1 565	43.4%	40.7%
45-54	2 632	18.6%	-13.7%	5 439	25.1%	-9.1%	1 280	35.5%	57.5%
55-64	2 929	20.7%	43.8%	3 684	17.0%	6.9%	191	5.3%	-39.8%
65+	1 472	10.4%	540.5%	1 885	8.7%	314.9%	50	1.4%	-52.8%
LENGTH OF DAYS	14 152	100.0%	35.5%	21 669	100.0%	14.5%	3 605	100.0%	18.0%
Under 1 day	1 132	8.0%	69.4%	2 449	11.3%	70.2%	570	15.8%	788.1%
1 Day	8 703	61.5%	39.8%	10 921	50.4%	2.1%	1 280	35.5%	-31.8%
2 Days	2 477	17.5%	13.4%	4 420	20.4%	-1.1%	710	19.7%	-6.2%
3 Days	1 047	7.4%	157.1%	1 929	8.9%	61.7%	523	14.5%	211.2%
4 Days	524	3.7%	56.7%	910	4.2%	65.8%	332	9.2%	219.4%
5 Days	42	0.3%	-41.9%	498	2.3%	338.7%	0	0.0%	0.0%
6 Days	71	0.5%	-3.2%	65	0.3%	-68.8%	0	0.0%	0.0%
7 Days	42	0.3%	-77.4%	43	0.2%	-	47	1.3%	-
8- 10 Days	42	0.3%	-72.9%	217	1.0%	63.5%	50	1.4%	136.1%
11 -14 Days	0	0.0%	-100.0%	108	0.5%	186.1%	47	1.3%	9.6%
15 - 29 Days	28	0.2%	-66.1%	65	0.3%	-14.2%	0	0.0%	0.0%
30- 59 Days	42	0.3%	-	43	0.2%	128.9%	47	1.3%	119.2%
60 Days & Over	0	0.0%	0.0%	0	0.0%	0.0%	0	0.0%	0.0%
Av. Length of Stay (Days)	1.6		-11.1	1.8		0.0	2.4		31.1
Visitor Nights	22373		17.52%	38927		24.20%	8491		50.98%

CHARACTERISTICS									
	Netherlands			Norway			Portugal		
	NO.	%	%CHG	NO.	%	%CHG	NO.	%	%CHG
MODE OF TRAVEL	17 874	100.0%	37.2%	946	100.0%	0.5%	6720	100.0%	1.2%
Air	357	2.0%	814.4%	129	13.6%	184.8%	195	2.9%	-73.6%
Land	17 517	98.0%	34.8%	817	86.4%	-8.8%	6 525	97.1%	10.5%
GENDER	17 874	100.0%	37.2%	946	100.0%	0.5%	6720	100.0%	1.2%
Male	9 920	55.5%	49.0%	559	59.1%	-1.0%	4 543	67.6%	-15.1%
Female	7 954	44.5%	24.8%	387	40.9%	2.8%	2 177	32.4%	69.0%
AGE GROUP	17 874	100.0%	37.2%	946	100.0%	0.5%	6720	100.0%	1.2%
18-24	947	5.3%	150.7%	129	13.6%	43.9%	396	5.9%	99.0%
25-34	3 664	20.5%	114.6%	172	18.2%	-52.0%	1 384	20.6%	14.5%
35-44	3 897	21.8%	-1.0%	172	18.2%	-36.0%	3 165	47.1%	12.1%
45-54	3 736	20.9%	-6.6%	344	36.4%	285.2%	988	14.7%	-55.3%
55-64	4 218	23.6%	54.1%	86	9.1%	-36.0%	195	2.9%	-2.2%
65+	1 412	7.9%	416.0%	43	4.5%	-	591	8.8%	-
LENGTH OF DAYS	17 874	100.0%	37.2%	946	100.0%	0.5%	6720	100.0%	1.2%
Under 1 day	1 376	7.7%	95.6%	0	0.0%	0.0%	1 976	29.4%	78.1%
1 Day	7 954	44.5%	0.2%	172	18.2%	-45.1%	1 982	29.5%	19.4%
2 Days	5 988	33.5%	70.8%	258	27.3%	15.3%	1 579	23.5%	-34.1%
3 Days	1 573	8.8%	255.0%	129	13.6%	-28.0%	793	11.8%	7.6%
4 Days	590	3.3%	248.2%	172	18.2%	281.2%	0	0.0%	-100.0%
5 Days	54	0.3%	2.9%	43	4.5%	-5.8%	195	2.9%	-
6 Days	36	0.2%	-60.8%	0	0.0%	0.0%	0	0.0%	0.0%
7 Days	0	0.0%	0.0%	44	4.6%	-	0	0.0%	-100.0%
8- 10 Days	36	0.2%	-	0	0.0%	-100.0%	195	2.9%	4.8%
11 -14 Days	71	0.4%	82.9%	86	9.1%	-	0	0.0%	0.0%
15 - 29 Days	125	0.7%	60.0%	43	4.5%	-5.8%	0	0.0%	0.0%
30- 59 Days	36	0.2%	-	0	0.0%	0.0%	0	0.0%	0.0%
60 Days & Over	36	0.2%	-	0	0.0%	0.0%	0	0.0%	0.0%
Av. Length of Stay (Days)	2.6		63.8	4.6		14.8	1.5		-28.6
Visitor Nights	46772		131.40%	4343		14.01%	10080		-27.14%

CHARACTERISTICS	EUROPE								
	Sweden			Switzerland			UK		
	NO.	%	%CHG	NO.	%	%CHG	NO.	%	%CHG
MODE OF TRAVEL	2 115	100.0%	19.7%	3 307	100.0%	11.3%	15 813	100.0%	-3.7%
Air	44	2.1%	-80.5%	228	6.9%	96.9%	2 293	14.5%	102.3%
Land	2 071	97.9%	34.5%	3 079	93.1%	7.8%	13 520	85.5%	-11.6%
GENDER	2 115	100.0%	19.7%	3 307	100.0%	11.3%	15 813	100.0%	-3.7%
Male	1 125	53.2%	-7.4%	1 885	57.0%	48.2%	8 539	54.0%	-8.5%
Female	990	46.8%	79.5%	1 422	43.0%	-16.4%	7 274	46.0%	2.5%
AGE GROUP	2 115	100.0%	19.7%	3 307	100.0%	11.3%	15 813	100.0%	-3.7%
18-24	91	4.3%	-18.3%	93	2.8%	19.8%	601	3.8%	-47.0%
25-34	539	25.5%	95.7%	863	26.1%	91.1%	2 008	12.7%	26.0%
35-44	315	14.9%	-5.1%	1 025	31.0%	13.1%	2 767	17.5%	-39.6%
45-54	360	17.0%	-35.0%	744	22.5%	-9.9%	3 700	23.4%	-14.0%
55-64	539	25.5%	62.4%	420	12.7%	-31.1%	3 811	24.1%	20.2%
65+	271	12.8%	66.5%	162	4.9%	65.2%	2 925	18.5%	78.1%
LENGTH OF DAYS	2 115	100.0%	19.7%	3 307	100.0%	11.3%	15 813	100.0%	-3.7%
Under 1 day	404	19.1%	82.9%	397	12.0%	927.1%	2 657	16.8%	5.0%
1 Day	675	31.9%	11.0%	1 654	50.0%	-5.2%	4 570	28.9%	-23.6%
2 Days	539	25.5%	39.4%	675	20.4%	-14.3%	4 080	25.8%	4.3%
3 Days	135	6.4%	-38.7%	304	9.2%	42.2%	1 202	7.6%	-23.8%
4 Days	91	4.3%	-45.2%	139	4.2%	259.5%	648	4.1%	-12.3%
5 Days	47	2.2%	-	0	0.0%	-100.0%	822	5.2%	233.7%
6 Days	44	2.1%	-18.9%	23	0.7%	-59.0%	111	0.7%	-48.2%
7 Days	0	0.0%	0.0%	0	0.0%	0.0%	111	0.7%	-25.1%
8- 10 Days	44	2.1%	-59.5%	0	0.0%	-100.0%	380	2.4%	-30.0%
11 -14 Days	44	2.1%	-	46	1.4%	159.6%	601	3.8%	115.2%
15 - 29 Days	91	4.3%	-	69	2.1%	-	427	2.7%	29.9%
30- 59 Days	0	0.0%	0.0%	0	0.0%	0.0%	206	1.3%	212.8%
60 Days & Over	0	0.0%	0.0%	0	0.0%	0.0%	0	0.0%	-100.0%
Av. Length of Stay (Days)	2.9		23.9	2.1		17.2	3.27		16.8
Visitor Nights	6030		49.59%	6963		31.10%	51732		13.12%

Frequency of Visit

QUENCY OF VISIT (%), 2014

	TOTAL	AFRICA									
QUENCY OF VISIT		Botswana	Kenya	Lesotho	Malawi	Mozambique	Nigeria	RSA	Tanzania	Zambia	Zimbabwe
Visit	36	37	36	49	53	5	56	13	65	61	39
at Visit	64	63	64	51	47	95	44	87	35	39	62

AFRICA

AMERICA			MIDDLE EAST	ASIA & AUSTRALIA				
Brazil	Canada	USA	Israel	Australia	China	India	Pakistan	Taiwan
33	79	58	100	80	69	20	59	50
67	21	42	0	20	31	80	41	50

ASIA & AUSTRALIA

EUROPE									
Belgium	France	Germany	Italy	Netherlands	Norway	Portugal	Sweden	Switzerland	UK
86	90	82	92	84	73	74	80	86	64
14	10	18	8	16	27	26	20	14	36

Travelling Companion

TRAVELLING COMPANIONS (%), 2014

TRAVELLING COMPANIONS	TOTAL	AFRICA									
		Botswana	Kenya	Lesotho	Malawi	Mozambique	Nigeria	RSA	Tanzania	Zambia	Zimbabwe
Alone	15	15	67	9	33	12	47	19	54	44	33
With Spouse/ Partner	30	13	8	12	20	22	13	29	7	19	16
With Friends/ Relatives	21	30	8	49	20	26	33	21	12	17	22
With Colleagues/ Association	7	30	0	21	13	3	7	7	27	17	11
With Family	21	11	17	6	13	36	0	23	0	3	17
Packaged Tour	6	0	0	3	0	1	0	0	0	0	1

AMERICA			MIDDLE EAST	ASIA & AUSTRALIA				
Brazil	Canada	USA		Australia	China	India	Pakistan	Taiwan
0	14	15	0	14	47	33	24	13
50	22	21	75	17	20	17	29	38
33	18	27	25	20	13	17	41	13
17	7	12	0	2	7	0	6	13
0	12	13	0	25	0	33	0	25
0	28	12	0	22	13	0	0	0

EUROPE									
Belgium	France	Germany	Italy	Netherlands	Norway	Portugal	Sweden	Switzerland	UK
0	3	4	5	2	5	6	4	5	14
28	34	43	51	42	27	30	37	58	28
26	14	14	22	14	27	27	22	20	18
8	4	7	4	6	9	3	13	3	7
28	19	12	15	20	32	33	15	8	15
10	26	21	3	17	0	0	9	6	18

Main Purpose

MAIN PURPOSE OF VISIT (%) 2014

MAIN PURPOSE	TOTAL	AFRICA									
		Botswana	Kenya	Lesotho	Malawi	Mozambique	Nigeria	RSA	Tanzania	Zambia	Zimbabwe
Holiday	54	59	18	69	13	38	25	40	21	19	24
Business	12	11	46	3	27	2	31	16	49	35	24
VFR	9	25	18	14	20	5	38	13	16	35	37
Transit	23	0	0	10	13	55	0	27	0	0	9
Other	3	5	18	3	27	0	6	4	14	11	6

Brazil	AMERICA		MIDDLE EAST	ASIA & AUSTRALIA				
	Canada	USA		Australia	China	India	Pakistan	Taiwan
33	85	64	100	62	33	20	0	38
33	7	17	0	5	39	60	39	13
0	1	7	0	7	28	20	44	38
33	3	6	0	27	0	0	6	0
0	4	6	0	0	0	0	11	13

EUROPE									
Belgium	France	Germany	Italy	Netherlands	Norway	Portugal	Sweden	Switzerland	UK
82	92	87	78	94	86	67	80	86	76
2	1	3	5	1	9	6	4	4	10
2	0	1	1	0	5	3	2	1	4
15	6	9	15	5	0	24	11	9	9
0	0	0	1	0	0	0	2	0	1

VISITOR ARRIVALS

1. ANNUAL VISITOR AND VISITOR DAYS, 2008 - 2014

REGION OF RESIDENCE YEAR	AMERICAS	ASIA	EUROPE	AFRICA	TOTAL	AVERAGE LENGTH OF STAY (DAYS)	VISITOR DAYS	
							Formal Accommodation *	Overall nights ¹
2008	19 607	18 174	107 008	1 041 211	1 186 000	2.50	282 505	1 887 720
2009	20 187	19 350	113 155	1 191 258	1 343 950	2.48	311 864	2 255 917
2010	20 499	19 498	84 483	1 218 053	1 342 533	3.16	316 230	2 742 565
2011	18 825	18 446	65 875	1 225 220	1 328 366	2.61	257 815	2 295 239
2012	20 260	19 919	73 126	1 165 225	1 278 530	2.37	294 560	2 104 922
2013	20 784	22 291	85 905	1 169 763	1 298 743	2.00	276 903	2 592 458
2014	22 685	23 813	100 308	1 177 815	1 324 621	2.21	280 956	2 928 115
Average Annual Growth(%) 2007 - 2013	15.7	31.0	-6.3	13.1	11.7	-11.6	-0.5	55.1

* indicates formal accommodation only

¹ indicates private and formal accommodation

OUTBOUND TRAVEL

SWAZILAND OUTBOUND STATISTICS, 2008- 2014

YEAR/ MONTH	MODE OF DEPARTURE	NUMBER OF DEPARTURES			PERCENTAGE CHANGE			PERCENTAGE DISTRIBUTION		
		AIR	ROAD	TOTAL	AIR	ROAD	TOTAL	AIR	ROAD	TOTAL
2008		9 284	1 168 186	1 177 470	-5.9	4.3	4.2	0.8	99.2	100.0
2009		9 241	1 234 955	1 244 196	-0.5	5.7	5.7	0.7	99.3	100.0
2010		8 772	1 132 109	1 140 881	-5.0	-8.3	-8.3	0.8	99.2	100.0
2011		8 530	1 255 143	1 263 673	-2.7	10.9	10.8	0.7	99.3	100.0
2012		8 885	1 393 718	1 402 603	4.2	11.0	10.8	0.6	99.4	100.0
2013		9 000	1 564 032	1 573 032	1.3	12.2	12.2	0.6	99.4	100.0
2014		8 592	1 648 712	1 657 304	-4.7	5.1	5.4	0.5	99.5	100.0
January		443	146 729	147 172	5.9	13.8	13.8	0.3	99.7	100.0
February		682	120 687	121 369	5.9	13.6	13.6	0.6	99.4	100.0
March		847	138 195	139 042	26.4	8	8.1	0.6	99.4	100.0
April		702	156 240	156 942	15.4	15.9	15.7	0.4	99.6	100.0
May		731	134 448	135 179	8.5	7.6	7.5	0.5	99.5	100.0
June		782	129 046	129 828	3.8	7.4	7.3	0.6	99.4	100.0
July		839	135 831	136 670	4.3	0.9	0.9	0.6	99.4	100.0
August		794	143 110	143 904	6.8	-3.2	-3.3	0.6	99.4	100.0
September		902	124 875	125 777	15.3	-8.8	-8.8	0.7	99.3	100.0
October		634	118 042	118 676	32	-4.3	-4.5	0.5	99.5	100.0
November		832	132 696	133 528	5.2	2.9	2.9	0.6	99.4	100.0
December		404	168 813	169 217	27.2	4.8	4.7	0.2	99.8	100.0

HOTEL								
STATISTICAL TABLE								
ANNUAL REPORT ON TOURISM STATISTICS 2014								
ANNUAL AND STANDARD AVERAGE OCCUPANCY RATE OF GAZETTED HOTELS (%) 2008-2014								
YEAR		2008	2009	2010	2011	2012	2013	2014
MONTH								
Overall		47.76	52.83	55.17	45.34	54.27	46.77	44.69
January		29.9	40.15	44.52	38.32	43.41	35.86	37.44
February		39.42	43.34	51.55	42.18	50.63	43.16	42.00
March		41.37	47.21	54.39	47.58	53.44	49.48	43.39
April		41.64	46.85	53.73	46.42	52.77	48	42.15
May		37.19	50.34	56.76	43.26	55.94	41.56	46.68
June		39.73	42.65	56.08	41.19	55.46	43.38	41.27
July		44.06	48.96	53.05	46.95	52.05	49.99	49.03
August		51.81	47.3	61.92	54.5	60.84	51.84	45.88
September		50.2	49.11	53.9	43.87	52.78	48.65	46.07
October		48.6	47.65	57.29	45.27	56.58	50.45	47.47
November		51.8	52.19	61.73	46.16	60.95	51.18	48.83
December		48.14	54.8	56.8	47.62	55.99	47.27	45.85

ACCOMMODATION STATISTICS, 2014

ROOMS AVAILABLE - 2014												
Hotel Name	January	February	March	April	May	June	July	August	September	October	November	Total
Mbabane	3 605	3 421	3 600	3 507	3 602	3 517	3 603	3 601	3 524	3 603	3 518	42 713
Ezulwini	23 463	21 820	23 463	22 733	23 463	22 733	23 463	23 463	22 733	23 463	22 733	276 993
Manzini	10 285	9 451	10 285	10 007	10 285	10 007	10 285	12 238	10 007	10 285	10 007	123 231
Rest of Swaziland	15 710	14 301	15 710	15 257	15 710	15 262	15 767	15 772	15 317	15 772	15 317	185 670
Grand Total	53 063	48 993	53 058	51 504	53 060	51 519	53 118	55 074	51 581	53 123	51 575	628 607
ROOM-NIGHTS SOLD - 2014												
Hotel Name	January	February	March	April	May	June	July	August	September	October	November	Total
Mbabane	1 870	1 664	1 900	1 561	2 202	1 948	1 710	1 852	1 815	2 092	2 032	22 259
Ezulwini	9 639	10 281	11 869	10 406	12 840	10 061	12 915	13 837	12 714	13 912	13 717	145 651
Manzini	2 728	3 145	3 450	3 043	3 262	2 955	2 869	3 096	3 178	3 559	3 890	38 409
Rest of Swaziland	5 630	5 489	5 805	6 697	6 462	6 299	8 552	6 484	6 055	5 654	5 547	74 637
Grand Total	19 867	20 579	23 024	21 707	24 766	21 263	26 046	25 269	23 762	25 217	25 186	280 956
BEDS AVAILABLE - 2014												
Hotel Name	January	February	March	April	May	June	July	August	September	October	November	Total
Mbabane	5 580	5 208	5 580	5 400	5 580	5 504	5 716	5 716	5 504	5 716	5 504	66 724
Ezulwini	39 866	35 367	39 866	42 180	39 866	42 180	39 866	39 846	38 600	39 866	38 580	475 949
Manzini	12 400	11 200	12 400	12 000	12 400	12 000	12 400	12 400	12 000	12 400	12 000	145 597
Rest of Swaziland	32 488	27 872	30 969	29 970	30 969	29 970	30 969	30 941	29 998	30 969	29 970	366 054
Grand Total	90 334	79 647	88 815	89 550	88 815	89 654	88 951	88 903	86 102	88 951	86 054	1 054 324
BED-NIGHTS SOLD - 2014												
Hotel Name	January	February	March	April	May	June	July	August	September	October	November	Total
Mbabane	1 966	2 186	2 423	2 038	2 070	1 873	1 757	1 917	2 383	2 092	2 520	25 295
Ezulwini	13 923	14 651	16 912	16 079	17 948	14 239	18 757	20 417	17 961	18 392	19 393	209 753
Manzini	2 886	4 040	5 032	4 844	4 520	5 197	5 199	5 736	5 249	4 301	4 911	55 836
Rest of Swaziland	7 701	6 896	7 334	8 353	7 699	7 039	8 730	7 725	7 617	7 130	6 930	90 935
Grand Total	26 476	27 773	31 701	31 314	32 237	28 348	34 443	35 795	33 210	31 915	33 754	381 819
DOMESTIC TOURISTS - 2014												
Hotel Name	January	February	March	April	May	June	July	August	September	October	November	Total
Mbabane	341	280	249	256	241	308	234	302	326	210	359	3 301
Ezulwini	2 253	2 780	3 006	3 062	3 207	3 754	3 726	3 572	3 463	3 350	3 504	39 600
Manzini	1 489	1 618	2 100	1 205	1 829	1 882	4 637	2 613	2 562	2 413	2 119	26 499
Rest of Swaziland	3 036	3 512	3 946	3 065	3 015	3 227	2 774	3 003	3 893	3 995	4 049	40 699
Grand Total	7 119	8 190	9 301	7 588	8 292	9 171	11 371	9 490	10 244	9 968	10 031	110 099
INTERNATIONAL TOURISTS - 2014												
Hotel Name	January	February	March	April	May	June	July	August	September	October	November	Total
Mbabane	1 875	2 020	1 826	2 592	1 893	1 711	1 860	1 956	1 707	2 554	2 904	24 791
Ezulwini	13 754	14 974	15 915	15 898	13 680	10 681	14 262	18 057	18 953	17 445	14 924	185 991
Manzini	1 350	1 470	2 532	2 080	1 737	1 593	1 000	2 044	1 693	2 243	2 076	22 788
Rest of Swaziland	6 662	4 813	6 046	6 825	4 630	4 571	7 910	9 311	4 477	6 304	5 550	73 544
Grand Total	23 641	23 277	26 319	27 395	21 940	18 556	25 032	31 368	26 830	28 546	25 454	307 114
TOTAL NUMBER OF TOURISTS - 2014												
Hotel Name	January	February	March	April	May	June	July	August	September	October	November	Total
Mbabane	2 216	2 300	2 075	2 848	2 134	2 019	2 094	2 258	2 033	2 764	3 263	28 092
Ezulwini	16 007	17 754	18 921	18 960	16 887	14 435	17 988	21 629	22 416	20 795	18 428	225 591
Manzini	2 839	3 088	4 632	3 285	3 566	3 475	5 637	4 657	4 255	4 656	4 195	49 287
Rest of Swaziland	9 698	8 325	9 992	7 798	7 645	7 798	10 684	12 314	8 370	10 299	9 599	114 243
Grand Total	30 760	31 467	35 620	34 983	30 232	27 277	36 403	40 858	37 074	38 514	35 485	417 213
TOTAL BILL-2014												
Hotel Name	January	February	March	April	May	June	July	August	September	October	November	Total
Mbabane	1 599 955.84	1 007 217.00	1 111 501.95	996 862.50	1 323 652.00	1 215 326.00	1 713 513.00	1 748 435.00	1 612 793.00	1 989 373.01	1 738 174.00	17 693 662.30
Ezulwini	9 773 357.65	10 744 879.37	13 598 843.15	11 621 868.95	14 198 627.98	10 194 750.58	11 832 473.54	14 798 293.95	12 261 652.54	14 342 611.44	12 925 060.07	150 152 398.55
Manzini	1 678 086.70	2 422 886.29	2 835 978.84	2 115 145.92	3 111 956.18	3 165 649.27	2 608 441.54	3 065 956.51	2 651 861.28	3 129 551.74	3 640 579.23	33 423 658.84
Rest of Swaziland	9 731 334.81	5 744 638.56	5 787 808.86	5 857 268.85	5 520 407.99	5 530 301.79	5 767 358.90	6 342 089.77	6 139 143.47	5 572 200.41	6 115 207.65	74 761 666.22
Grand Total	22 782 735.00	19 919 622.22	23 332 132.80	20 591 146.22	24 154 644.15	20 106 027.64	21 921 786.38	25 954 785.23	22 665 450.29	25 033 736.60	24 419 020.95	276 031 385.91

TOURISM STATISTICS (RATES) - 2014

BREAKDOWN OF THE 2014 TOTAL BILL / RECEIPTS

1. Expenditure per Person per Night = (Total Bill/ No. of Bed-Nights Sold)		Month	Bill / Receipts	Accommodation	Restaurant	Transport	Entertainment / other
Mbabane	=	January	22 782 735.00	8 211 413.41	8 419 061.76	672 551.17	108 026.28
Ezulwini	=	February	19 919 622.22	9 386 824.91	8 720 074.74	889 503.39	223 237.83
Manzini	=	March	23 332 132.80	10 603 368.06	10 700 228.73	1 392 449.68	205 616.51
Rest of S.D	=	April	20 591 146.22	9 074 540.94	9 860 213.81	891 635.45	129 082.52
Total	=	May	24 154 644.15	10 628 451.32	11 375 977.51	1 255 980.41	131 947.94
		June	20 106 027.64	8 686 957.09	8 965 313.35	789 231.37	279 980.76
		July	21 921 786.98	9 657 599.51	9 742 678.12	758 538.49	200 302.37
		August	25 954 785.23	11 442 827.45	11 863 162.12	1 328 173.35	220 328.33
		September	22 665 450.29	10 470 802.98	10 094 049.74	739 977.08	225 005.36
		October	25 033 736.60	11 228 993.37	10 922 499.86	874 697.64	176 540.23
		November	24 419 020.95	11 146 577.00	11 182 153.87	632 042.66	355 165.32
		December	25 150 297.87	10 872 856.93	10 968 757.88	763 043.24	333 184.44
		Total	276 031 385.91	121 411 212.95	122 814 171.48	10 987 823.98	2 588 417.95
2. Average Length of Stay = (No. of Bed Nights Sold/ No. of Tourists)							
Mbabane	=		0.900434287				
Ezulwini	=		0.929793298				
Manzini	=		1.132874795				
Rest of S.D	=		0.795978747				
Total	=		0.915165635				
3. Bed Occupancy Rates = [(No. of Bed Nights Sold/ No. of Beds Available)*100%]							
Mbabane	=		0.379098975				
Ezulwini	=		0.440704781				
Manzini	=		0.383496913				
Rest of S.D	=		0.248419632				
Total	=		0.362145792				
4. Room Occupancy Rates = [(No. of Room Nights Sold/ No. of rooms Available)*100%]							
Mbabane	=		0.521129399				
Ezulwini	=		0.525829173				
Manzini	=		0.311682937				
Rest of S.D	=		0.401987397				
Total	=		0.446950161				

Source: Central Statistics Office

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