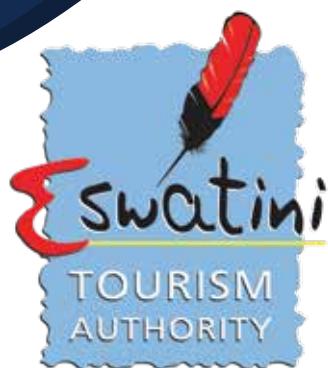


RESEARCH ANNUAL REPORT

2020



www.thekingdomofeswatini.com



OVERVIEW

Arrivals



345,348

Change

-70,9%

Av. visitor spend (formal accommodation)



€924.85

-12,6%

Av. Length of stay



2.01



+11.7%

Room occupancy



23.79%

-36%

Outbound travel



489,728

-69.7%

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BACKGROUND

Understanding Tourism Research & Statistics

In recognizing tourism's important role in the economy of Eswatini, a key objective of ETA is to provide leadership and supporting role to the tourism sector in the measurement and analysis of consistent, reliable, timely and comparable data to assess the sector's performance and contribution to national economic activity. The organisation therefore collates data that is designed to provide policymakers, tourism industry players, investors, researchers and the general public with market insights, so as to ensure that supply of tourism characteristic products and services are aligned with market demand.

Our Tourism Research Report

This publication provides a summary of inbound tourism statistics, relating how the tourism sector performed in 2020 with instances of comparison with earlier years. In its fourteenth edition, this report includes information on global tourism performance, an analysis of the character, behaviour and experiences of international visitors, placing emphasis on the country's top visitor-generating markets.

Information in this edition is based on studies carried out by the ETA Research Department which includes data on the Exit Survey, Day Visitor Survey and other periodic visitor surveys. Additionally, key national statistics on the performance of the accommodation sector are provided by the Central Statistics Office and entry/ departure data from the Department of Immigration. Global tourism data is sourced from international tourism and statistics organisations which comprise of World Tourism Organization (UNWTO), Eurostats, OECD and other relevant global tourism studies. This report provides the following information:

- Inbound arrivals, focusing on Eswatini's main source markets
- Purpose of travel for inbound arrivals
- Visitor nights and accommodation performance
- Outbound travel by Eswatini residents

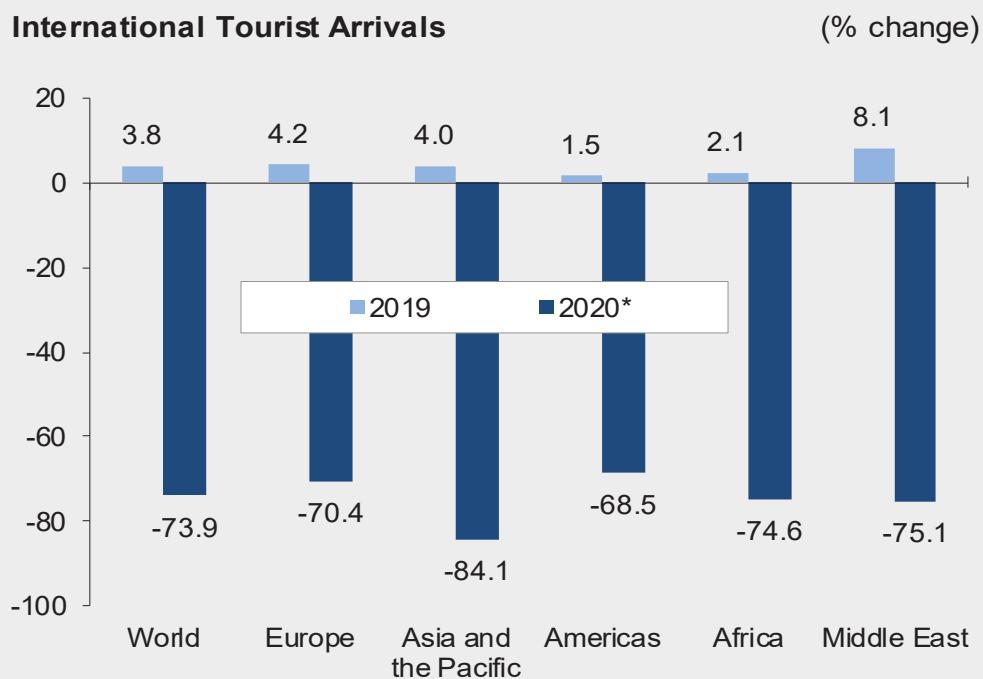
The Tourism Annual Statistics Report and previous annual reports, including statistics on monthly international visitor arrival and annual accommodation performance, are accessible on the ETA website <http://www.thekingdomofeswatini.com> under 'ETA Resources' at the bottom of the homepage. ETA welcomes your input and suggestions for additions in future issues of this publication, and is pleased to grant permission to use excerpts from this material when credit is given to ETA. For more information on Eswatini tourism statistics, please send an email to statistics@tourismauthority.org.sz/data@tourismauthority.org.sz/resource@tourismauthority.org.sz or contact our offices (see back cover).

GLOBAL PERFORMANCE

Tourism suffered the greatest crisis on record in 2020 following an unprecedented health, social and economic emergency amid the outbreak of the COVID-19 pandemic. International tourist arrivals (overnight visitors) plunged by 74% in 2020 over the previous year due to widespread travel restrictions and a massive drop in demand. This represents 1 billion fewer international arrivals and means a return of international tourism to levels of 30 years ago. It exceeds by far the drop of 4% in arrivals seen in 2009, which was the largest decline experienced by international tourism previous to the pandemic.

The collapse in international travel represents an estimated loss of USD 1.3 trillion in export revenues - more than 11 times the loss recorded during the 2009 global economic crisis. This plunge in international tourism translates into an economic loss of US\$ 2 trillion in direct tourism gross domestic product (GDP), more than 2% of the world's GDP. The crisis has also put 100 to 120 million direct tourism jobs at risk, many of them in small and medium-sized enterprises and with a high share of women and youth. Data on international tourism expenditure reflects very weak demand for outbound travel last year, while some large markets such as China, France and India, shown comparatively more resilient results. While demand for international tourism dropped sharply and still remains subdued, domestic tourism started to pick up by mid-2020 and continued to grow in several large markets such as China, where domestic air travel has returned to pre-COVID levels.

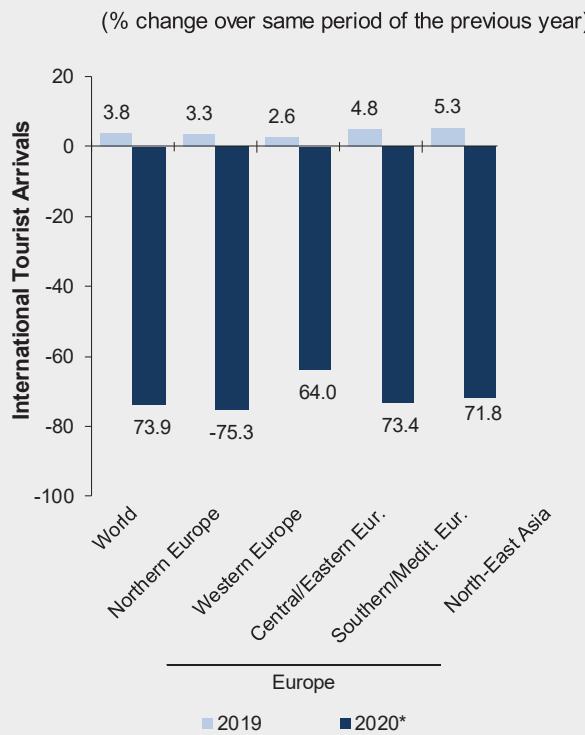
Asia and the Pacific saw an 84% decrease in international arrivals in 2020, about 300 million less than in the previous year. The Middle East and Africa both recorded a 75% drop in arrivals. In Europe arrivals declined by 70%, representing over 500 million fewer international tourists, while the Americas saw a drop of 69%.



Source: World Tourism Organization (UNWTO) © * Provisional data

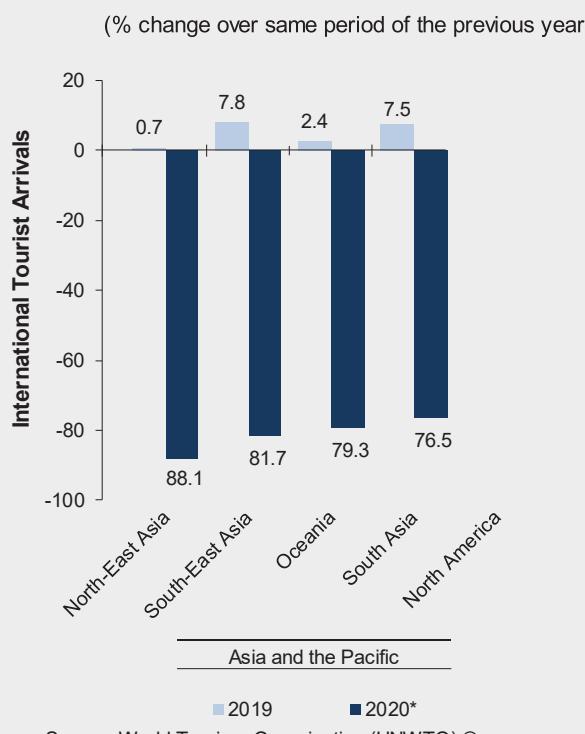
Regional insights

Europe



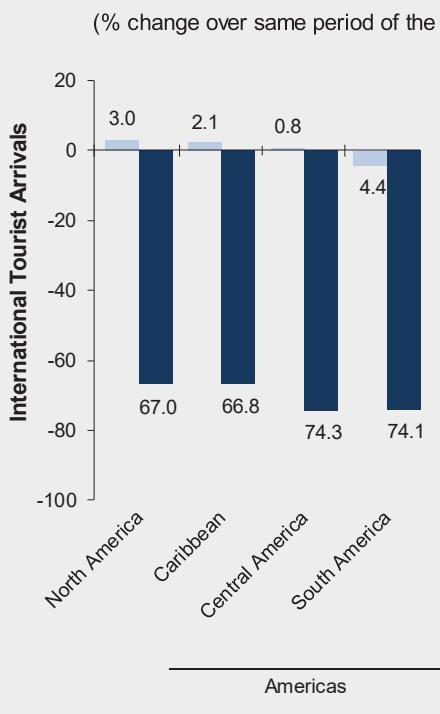
Europe recorded a 70% decrease in arrivals, despite a small and short-lived revival in the summer of 2020. The region suffered the largest drop in absolute terms, with over 500 million fewer international tourists in 2020.

Asia & The Pacific



Asia and the Pacific (-83%), the first region to suffer the impact of the pandemic and the one with the highest level of travel restrictions currently in place, recorded the largest decrease in arrivals. The region saw 300 million fewer arrivals than in 2019.

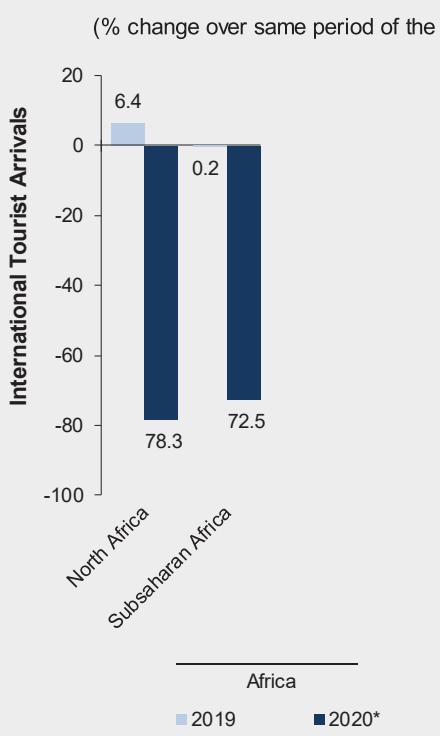
Americas



The Americas saw a 69% decrease in international arrivals, following somewhat better results in the last quarter of the year.

Source: World Tourism Organization (UNWTO) ©

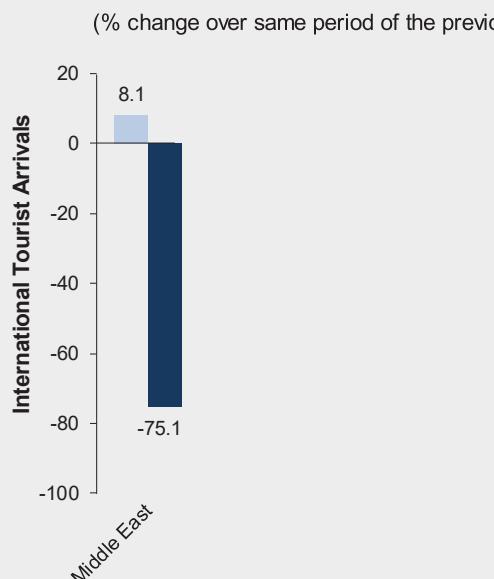
Africa



African arrivals declined by 74.6 % with Northern Africa (-78.3%) realizing a sharper decline, percentage terms, compared to the Sub-Saharan region (-72.5%). In terms of the share of global tourism, North Africa accounted for 6.4% while Sub-Saharan had a diminished share (-0.2%).

Source: World Tourism Organization (UNWTO) ©

Middle East



The case was similar to other parts of the world as demand declined by 75.1% with popular destinations in the United Arab Emirates reporting a substantial slowdown in visitations.

Middle East

■ 2019 ■ 2020*

Source: World Tourism Organization (UNWTO) ©



03

EFFECT OF COVID-19

HIGHLIGHTS

International Effects on Tourism
Source Market Trends of Border Closures
Main Barriers to the Recovery of
International Tourism

2020

a timeline marked by closures

23 JANUARY 30 JANUARY 11 MARCH 27 MARCH 20 APRIL 1 NOVEMBER



Wuhan
lockdown

WHO declares
the outbreak a
global health
emergency

WHO declares
the outbreak a
pandemic

Eswatini keeps
their borders
completely closed
for international
tourism

100% of worldwide
destinations
introduce travel
restrictions

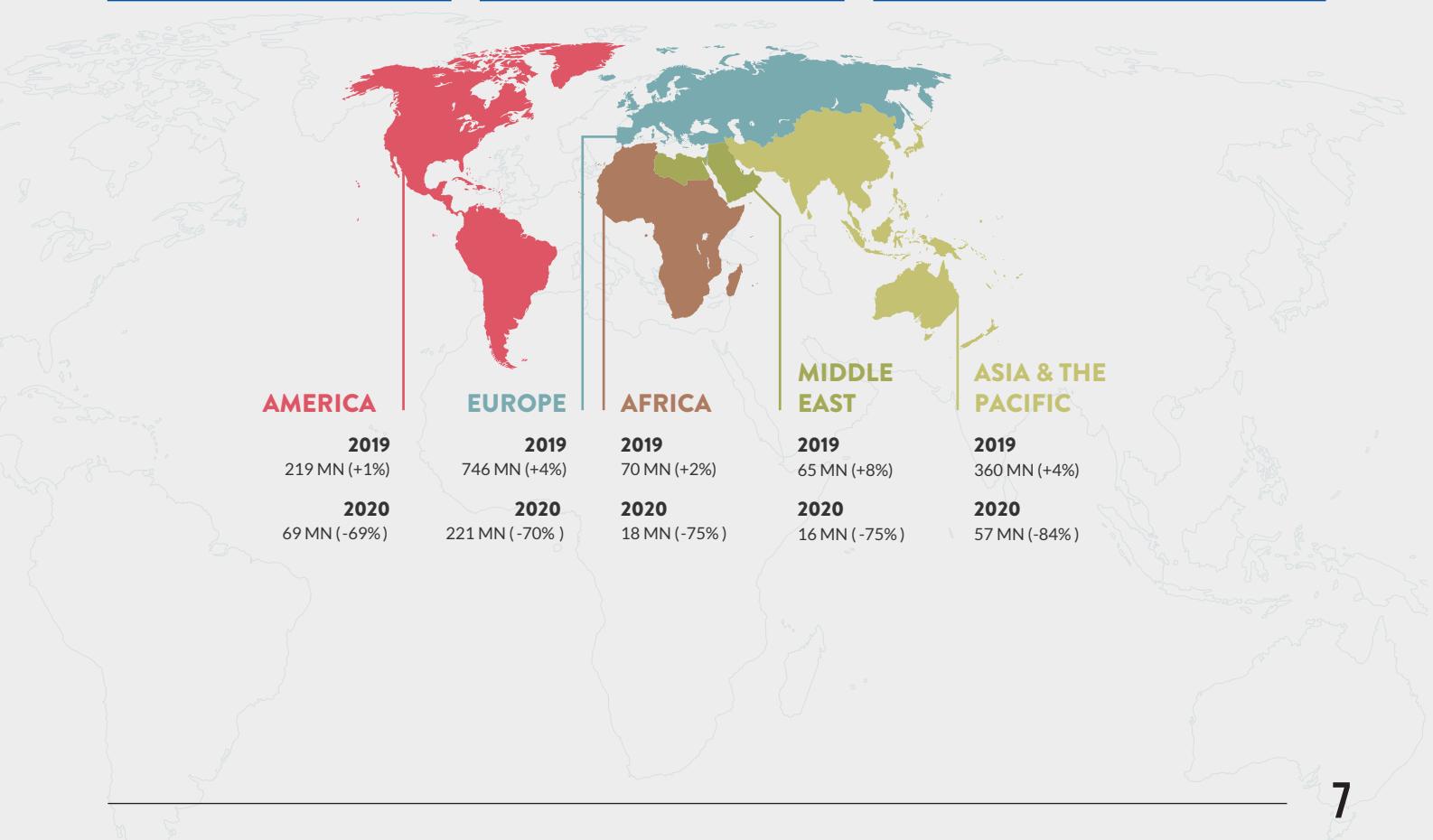
27% of all destinations
worldwide keep their
borders completely
closed for international
tourism

2020 JANUARY - DECEMBER INTERNATIONAL VISITOR ARRIVALS

WORLD 2019: 1.5 BILLION (+4%)
2020: 381 MILLION (-74%)

AFRICA 2019: 70.2 MILLION (+2.1%)
2020: 17.8 MILLION (-74.6%)

**SUB-SAHARAN
AFRICA** 2019: 44.6 MILLION (-0.2%)
2020: 12.3 MILLION (-72.5%)



SOURCE MARKET TRENDS OF BORDER CLOSURE 2020



Republic of South Africa

Month	Travel related Development
Mar-20	Lockdown measures effected, travel restricted to essential services.
01-Oct-20	Restrictions on inbound travel lifted subject to COVID 19 protocols.
11-Nov-20	Government relaxes South Africa's level 1 lockdown rules around international travel, allowing visitors from any country provided they follow health and safety guidelines.



United Kingdom

Month	Travel related Development
23-Mar-20	The Prime Minister announces UK wide lockdown.
08-Jul-20	The government announces a list of 59 countries for which the UK lifts the travel ban, a "safe travel list". Eswatini and RSA not on the list.
31-Oct-20	From 5 November to 2 December 2020, travelling away from home, including internationally, is restricted from England except in limited circumstances such as for work or for education.
07-Nov-20	Germany and Denmark removed from "safe travel list".



United States of America

Month	Travel related Development
19 Mar- 7 April	Most states issues stay at home orders.
14-Mar-20	US president Donald Trump announces a ban on inbound travel from the European Union except Ireland.
27-Apr-20	Some states started easing lockdown measures.
30-Apr-20	Outbound overseas travel permitted in line with destination country covid protocols.
5-Nov-20	TSA reported acummulative number of 2628 covid cases with 508 active cases, 8 deaths and 2121 recoveries.



Germany

Month	Travel related Development
20-Mar-20	First lockdown measures implemented.
1-Jun-20	Lockdown measures eased with restrictions.
1-Jul-20	Intra regional travel permitted along with 15 non EU countries.
1-Jul-20	"Safe countries" include Algeria, Australia, Canada, Georgia, Japan, Montenegro, Morocco, New Zealand, Rwanda, Serbia, South Korea, Thailand, Tunisia and Uruguay.
	"Safe countries" meaning travel to and from the EU to these countries bears minimum restrictions.
29-Oct-20	Bars and restaurants closed.



France

Month	Travel related Development
17-Mar-20	First lockdown measures implemented.
11-May-20	Lockdown measures eased with restrictions.
1-Jul-20	Intra regional travel permitted along with 15 non EU countries.
1-Jul-20	"Safe countries" include Algeria, Australia, Canada, Georgia, Japan, Montenegro, Morocco, New Zealand, Rwanda, Serbia, South Korea, Thailand, Tunisia and Uruguay.
29 Oct- 1 Dec	"Safe countries" meaning travel to and from the EU to these countries bears minimum restrictions. Nationwide lockdown implemented in the face of rising infections and hospitalization.



Netherlands

Month	Travel related Development
12-Mar-20	Nationwide lockdown measures implemented.
1-Jun-20	Lockdown measures eased with restrictions.
2-Jun-20	EasyJet and KLM Airlines announced decision to resume flights at 25-30 percent of normal capacity till destinations ease entry restrictions.
1-Jul-20	All commercial flights to be limited to European destinations. Intra regional travel permitted along with 15 non EU countries.
1-Jul-20	"Safe countries" include Algeria, Australia, Canada, Georgia, Japan, Montenegro, Morocco, New Zealand, Rwanda, Serbia, South Korea, Thailand, Tunisia and Uruguay. "Safe countries" meaning travel to and from the EU to these countries bears minimum restrictions.
14-Oct-20	Partial lockdown implemented putting restrictions on leisure travel.
29 Oct- 1 Dec	Nationwide lockdown implemented in the face of rising infections and hospitalization.

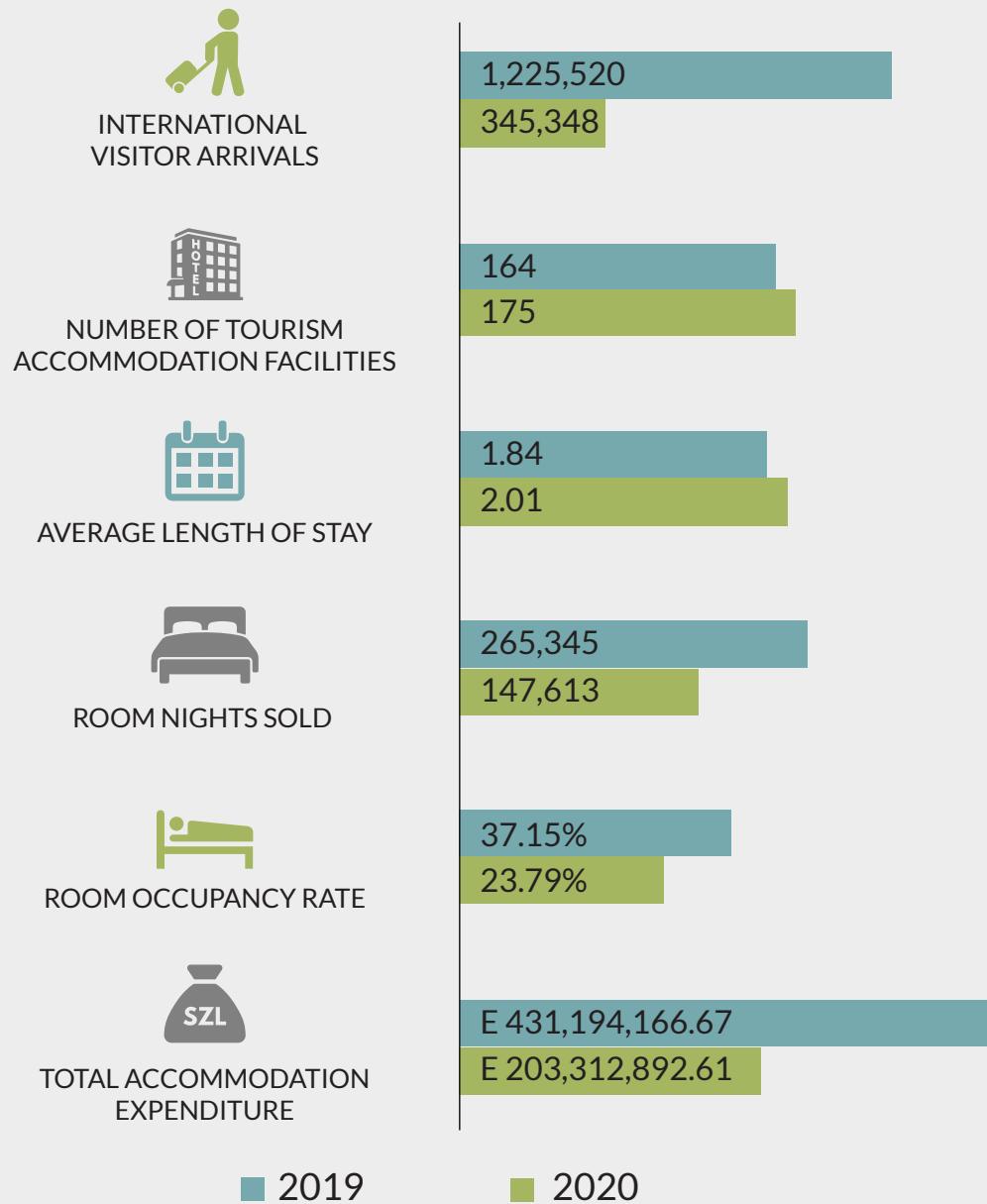


Mozambique

Travel related Development	
1-May-20	30 day national state of emergency announced. Flights limited to business, health workers and cargo.
27-May-20	Cross-border travel allowed under strict covid 19 regulations. Persons who have been outside the country required to self isolate for 14 days upon their return.
29-Jun-20	All international commercial passenger flights suspended
13-Jul-20	National state of emergency extended until 30 July 2020.
25-Aug-20	Commercial flights to and from Maputo remain very limited. Entry to Mozambique is prohibited except for Mozambican nationals and foreign nationals with a valid residency visa for Mozambique All other visas issued prior to 1 April 2020 have been cancelled Cross-border travel suspended under state of emergency regulations
30-Sep-20	Commercial flights to and from Maputo have resumed. Passenger flights are operating with a maximum frequency of twice a week. Entry to Mozambique is prohibited except for Mozambican nationals and foreign nationals with a valid residency visa for Mozambique. Cross-border travel still suspended under state of emergency regulations.
30-Oct-20	Entry to Mozambique is allowed to all travellers with a valid tourist or residency visa. National state of emergency extended indefinitely therefore cross-border travel still suspended under state of emergency regulations.

Effects of COVID-19

SELECTED INDICATORS



Main barriers to the recovery of international tourism

TRAVEL RESTRICTIONS



(opening of borders & administrative requirements)

SLOW VIRUS CONTAINMENT



(evolving virus)

ECONOMIC ENVIRONMENT



(reduction in household income)

LOW CONSUMER CONFIDENCE



(health and safety)

DELAYS IN FLIGHT RESUMPTION



(creating alternative airline routes)

Changes in traveller behaviour in times of COVID-19

-short-lived trends or here to stay?-



Closer

Domestic tourism has shown positive signs in many markets since people tend to travel closer. Travellers go for 'staycations' or vacations close to home.



New concerns

Health & Safety measures and cancellation policies are consumers' main concerns.



Get away

Nature, Rural Tourism and Road Trips have emerged as popular travel choices due to travel limitations and the quest for open-air experiences.



Younger travellers most resilient

Change in demographics:

Travel recovery has been stronger among younger segments. 'Mature' travellers and retirees will be the most impacted segments.



Last minute

Last-minute bookings have increased due to volatility of pandemic-related events and the travel restrictions.



Closer

Sustainability, authenticity, and localhood:

Travellers have been giving more importance to creating a positive impact on local communities, increasing looking for authenticity.



Adoption of travel tech

Digitalisation in tourism services is expected to accelerate, including a higher use of travel apps, contact-less payments and check-in, virtual experiences, and real-time information provision. Consumers keener to use digital rather than in-person services.



04 | KEY FACTS

HIGHLIGHTS

- Arrivals by Country
- Arrivals by Region
- Arrivals by Length of Stay
- Hotel Statistics
- Hotel Outbound Travel

ARRIVALS BY COUNTRY

Region/ Country	2014	2015	2016	2017	2018	2019	2020
Total	1 324 621	1 255 901	1 278 587	1 342 641	1 277 253	1 225 520	345 348
AFRICA	1 177 815	1 104 525	1 110 907	1 156 336	1 116 187	1 087 705	315 233
Botswana	5 913	5 833	5 969	5 837	5 450	5 428	1 451
Kenya	1 731	1 590	1 926	1 766	1 540	1 682	459
Lesotho	5 554	5 092	5 682	6 859	7 061	5 662	1 258
Malawi	4 760	5 493	5 055	5 257	4 800	5 336	1 674
Mozambique	219 555	181 271	202 042	213 920	195 644	146 421	51 273
Nigeria	3 537	3 668	3 734	3 483	3 371	2 987	739
RSA	856 492	810 249	814 220	850 221	832 276	856 095	238 324
Tanzania	5 718	6 311	5 659	5 694	5 483	6 039	1 679
Zambia	5 458	5 380	5 600	5 447	4 936	4 437	1 193
Zimbabwe	58 624	69 467	49 295	46 179	44 231	42 956	14 089
Other Africa	10 473	10 171	11 723	11 673	11 395	10 660	3 093
NORTH & SOUTH AMERICA	22,685	23 416	24 210	25 636	22 809	21 093	4 225
Brazil	974	996	1 132	1 329	1 259	840	175
Canada	3 470	3 568	4 137	4 412	4 055	3 815	988
USA	17 359	17 988	18 014	18 595	16 243	15 048	2 788
Other America	883	864	928	1 300	1 252	1 389	274
ASIA	18 909	20 384	25 846	25 790	22 172	22 376	348
China	2 046	2 221	2 732	2 650	2 293	2 260	6
India	5 031	5 145	6 867	7 580	6 070	6 364	13
Pakistan	4 242	5 216	7 450	7 517	6 166	5 892	232
Philippines	484	477	574	409	465	486	3
South Korea	2 158	2 315	2 300	1 904	2 032	1 922	5
Taiwan	1 268	1 105	1 240	1 248	1 331	1 688	89
Other Asia	3 680	3 905	4 681	4 481	3 814	3 765	7 079
EUROPE	100 308	103 559	112 974	129 955	111 569	90 460	412
Belgium	4 524	4 909	5 588	6 529	6 491	5 646	555
France	14 152	19 360	21 253	32 802	26 162	21 091	2 022
Germany	21 669	21 510	22 895	23 981	22 622	16 400	2 063
Italy	3 605	3 277	3 455	3 682	3 303	2 976	133
Netherlands	17 874	17 414	20 750	24 150	19 299	16 389	391
Norway	946	929	766	624	495	498	340
Portugal	6 720	6 047	6 610	5 657	4 264	3 142	1 163
Sweden	2 115	2 167	2 233	2 008	1 622	1 164	18 464
Switzerland	3 307	3 678	3 452	3 516	3 344	2 735	721
UK	15 813	14 646	15 503	16 069	13 885	11 285	4 371
Other Europe	9 583	9 622	10 469	10 938	10 083	9 134	3 261
OCEANIA	3 779	2 763	3 132	3 329	3 043	2 501	466
Australia	3 779	2 763	3 132	3 329	3 043	2 501	2 526
MIDDLE EAST	1 126	1 253	1 519	1 594	1 473	1 386	113
Kuwait	42	69	67	40	59	24	895
Iran	87	53	68	84	68	52	486
Israel	833	913	1 164	1 089	1 011	1 029	543
Saudi Arabia	4	20	4	25	7	5	2 772
UAE	24	8	6	13	11	10	2 311
Other Mid East	137	189	208	342	317	265	

Source: ETA in collaboration with the Department of Immigration (Entry/Exit cards)

Note: Data for visitors are compiled from Entry/ Exit Forms completed by all visitors arriving in Eswatini at the entry points

Data excludes arrivals of Swazis

ARRIVALS BY REGION

REGION OF RESIDENCE					VISITOR NIGHTS			
YEAR	AMERICAS	ASIA	EUROPE	AFRICA	TOTAL	AVERAGE LENGTH OF STAY (NIGHTS)	FORMAL ACCOMMODATION*	OVERALL NIGHTS
2014	22 685	23 813	100 308	1 177 815	1 324 621	2,21	280 956	2 928 115
2015	23 416	24 401	103 559	1 104 525	1 255 901	3,42	272 911	4 289 727
2016	24 210	30 497	112 974	1 110 907	1 278 588	3,50	280 569	4 478 492
2017	25 636	29 119	129 955	1 156 336	1 342 641	2,64	308 203	3 550 197
2018	22 809	25 215	111 569	1 116 187	1 277 253	2,27	279 884	2 895 584
2019	21 093	24 877	90 460	1 087 705	1 225 520	1,80	372 563	2 778 302
2020	4 225	7 079	18 464	315 233	345 348	2,01	159 927	694 557

* indicates formal accommodation only

¹ indicates private and formal accommodation

ARRIVALS BY BORDER POST

Border Post	2014	2015	2016	2017	2018	2019	2020
Airport	6 737	599	357	685	354	354	32
Bulembu	2 860	2 987	3 453	3 097	1 774	1 774	1 683
KM111	1 855	8 311	7 293	7 576	7 770	7 797	3 612
Gege	13 740	15 939	18 041	15 511	16 858	16 858	1890
Lavumisa	147 350	144 836	155 870	154 796	166 123	166 123	48553
Lomahasha	38 166	36 607	58 628	70 390	60 330	60 330	39146
Lundzi	4 435	5 339	7 326	11 381	7 180	7 180	297
Mahamba	184 014	193 157	206 074	199 075	207 310	207 310	36619
Mananga	168 432	165 085	158 664	156 467	172 442	172 442	29881
Matsamo	192 223	191 040	195 404	196 961	194 867	194 867	33988
Mhlumeni	49 293	48 353	59 677	87 119	77 972	77 972	15584
Ngwenya	639 516	669 999	675 136	617 949	601 933	601 933	126236
Nsalitje	84 248	82 881	84 078	83 294	70 095	70 095	1417
Sandlane	15 577	18 900	24 657	33 686	35 464	35 464	1432
Sicunusa	108 858	129 288	134 557	95 729	100 164	100 164	9303
Total	1 657 304	1 713 321	1 789 305	1 716 996	1 720 663	1 720 663	345 348

ARRIVALS BY LENGTH OF STAY

Length of Stay (Nights)	2014	2015	2016	2017	2018	2019	2020
Total	1 324 621	1 255 901	1 278 587	1 342 641	1 277 253	1 225 520	345 348
Less than 1	386 026	382 557	332 019	422 450	495 574	546 162	151 608
1	343 370	267 077	309 224	358 912	289 936	187 361	81 468
2	324 311	255 283	279 232	273 059	256 728	237 187	50 179
3	118 137	143 981	148 764	129 120	114 953	128 358	25 556
4	51 581	64 128	58 636	56 213	40 872	43 494	10 602
5	27 076	40 541	34 791	27 596	19 159	19 553	4 938
6	13 614	20 147	25 194	16 523	15 327	14 280	4 938
7	11 647	12 776	19 195	12 691	8 941	9 435	3 695
8-10	12 857	19 779	24 744	14 309	11 495	8 679	3 557
11-14	13 160	17 690	18 895	9 454	8 941	11 750	414
15-29	14 219	15 356	14 396	10 817	7 664	8 390	345
30-59	6 958	7 740	3 599	4 003	2 555	4 175	414
60 and over	1 664	8 846	9 898	7 495	5 109	6 621	898
Average Length of Stay(Nights)							
Formal & Private Accommodation	2,21	3,42	3,5	2,64	2,27	1,81	2,01
Formal accommodation	0,92	0,88	0,94	1,07	0,96	1,09	1,37

Source: Exit Survey, Eswatini Tourism Authority

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

Data excludes departing Eswatini residents.

VISITOR ARRIVALS BY PROFESSION AND AGE GROUP

Profession	2014	2015	2016	2017	2018	2019	2020
Total	1 324 621	1 255 901	1 278 587	1 342 641	1 277 253	1 225 520	345 348
Professional	626 546	529 990	498 649	453 813	434 266	485 112	133 650
Technical	137 761	97 960	101 008	134 264	106 012	79 662	19 685
Administration	99 347	71 586	79 272	98 013	89 408	88 437	17 958
Managerial	165 578	123 078	127 859	118 152	112 398	117 287	32 117
Clerical	13 246	8 791	6 393	20 140	15 327	26 521	7 252
Skilled	98 022	82 889	88 223	92 642	84 299	85 413	32 117
Semi-skilled	9 272	12 559	25 572	42 965	74 081	92 948	26 592
Unskilled	5 298	13 815	6 393	12 084	16 604	14 277	4 144
Retired	15 895	108 007	145 759	127 551	104 735	71 582	25 901
Unemployed	n/a	57 771	49 865	57 734	53 645	32 866	11 051
Self-employed	1 325	80 378	99 730	136 949	151 993	107 026	30 045
Student	9 272	67 819	48 586	46 992	34 486	24 389	4 835
Other	143 059	1 256	1 279	1 343			
Age Group (Years)	2014	2015	2016	2017	2018	2019	2020
18-24	46 362	71 008	53 701	93 985	39 595	26 150	5 526
25-34	223 861	294 104	274 896	308 807	282 273	275 068	75 286
35-44	482 162	361 303	375 905	295 381	397 226	462 459	129 506
45-54	335 129	300 984	322 204	402 792	325 700	326 747	89 100
55-64	162 928	153 440	171 331	174 543	173 706	111 391	34 189
65+	74 179	75 062	80 551	67 132	58 754	23 628	11 742

Source: Exit Survey, Eswatini Tourism Authority

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

Data excludes departing Eswatini residents

HOTEL STATISTICS

Accommodation facilities	2014	2015	2016	2017	2018	2019	2020
Number of facilities	137	140	138	157	157	164	176
Room Available	628 607	628 611	573 575	601 343	690 677	714 293	620 380
Room Nights Sold	280 956	272 911	280 569	308 203	279 884	265 345	147 613
Domestic Tourists	110 099	115 359	138 562	113 651	118 196	128 190	88 801
International Tourists	307 114	296 537	308 046	323 195	276 513	244 373	71 126
Total Tourists	417 213	411 896	446 608	436 846	394 709	372 563	159 927
Average Nights Spent	1	1	1	1	1	1	1
Room Occupancy Rate	44,7	43,41	48,92	51,25	41,00	37,00	23,79
Total Bill	276 031 386	271 889 626	365 622 358	380 583 555	387 490	431 194 167	203 312 893
Total arrivals	1,324,621	1,255,901	1,278,587	1,342,641	1,277,253	1,225,520	345,348

Source: Central Statistics 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

OUTBOUND TRAVEL

YEAR/MONTH	NUMBER OF DEPARTURES			PERCENTAGE CHANGE %			
	MODE OF DEPARTURE	AIR	ROAD	TOTAL	AIR	ROAD	TOTAL
2014		8 592	1 648 712	11 657 304	-4,7	5,1	5,4
2015		8 910	1 704 411	1 713 321	3,7	3,4	3,4
2016		7 650	1 781 655	1 789 305	-14,1	25,5	-25,4
2017		8 261	1 742 576	1 750 837	8,0	-2,2	-2,1
2018		8 076	1 708 920	1 716 996	-2,3	-2,0	-2,0
2019		8 151	1 712 512	1 720 663	0,9	0,0	0,0
2020		1 458	486 405	487 863	-82,1	-71,6	-71,6
January		419	137 041	137 460	28,9	6,0	6,1
February		551	122 529	123 080	3,8	17,0	16,9
March		203	90 874	91 077	-73,8	-36,3	-36,5
April		4	6 152	6 156	-99,3	-96,1	-96,1
May		0	9 927	9 927	-100,0	-92,9	-92,9
June		48	12 859	12 907	-93,2	-90,4	-90,4
July		0	13 953	13 953	-100,0	-90,5	-90,5
August		15	14 624	14 639	-97,9	-91,0	-91,0
September		13	14 791	14 804	-98,6	-90,0	-90,0
October		83	18 581	18 664	-92,2	-86,7	-86,7
November		119	24 304	24 423	-85,2	-81,9	-82,0
December		3	20 770	20 773	-99,3	-87,8	-87,8

Source: ETA in collaboration with the department of Immigration (Entry/Departure Cards)

05

WHO VISITS ESWATINI

HIGHLIGHTS

Our Markets
World Regions
Profession
Age and Sex



Visitor Profile

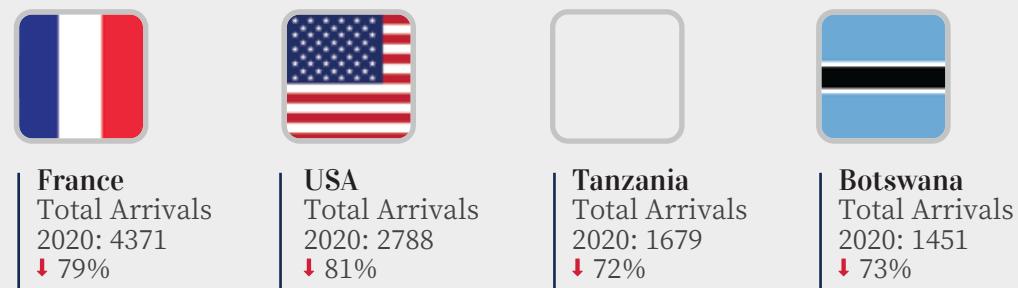
2020 will be remembered as the year of persistent uncertainties and challenges. The year was marked with devastating declines in tourism activity as international tourism suffered one of its toughest years in decades. Following four years of relatively robust and above global growth trend, international visitor arrivals fell by 70.9 percent in 2020 to record 345,348 thousand. Partial recovery was noted in the third quarter of the year, which was primarily driven by domestic and regional markets. However, optimism for recovery was short-lived as the second wave noted in the last quarter of 2020 hit hard throughout most markets.

OUR MARKETS

Primary Markets



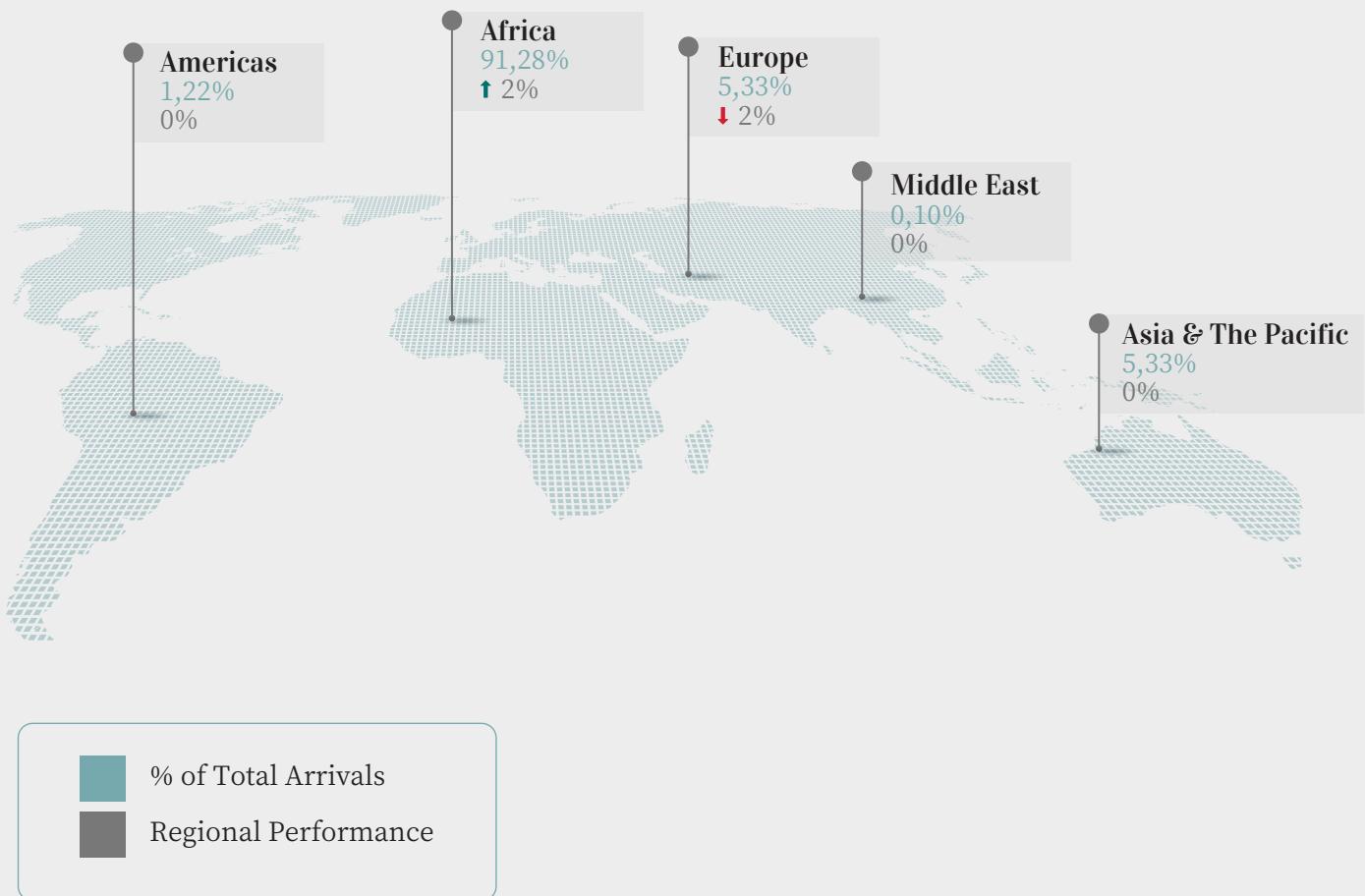
Emerging Markets



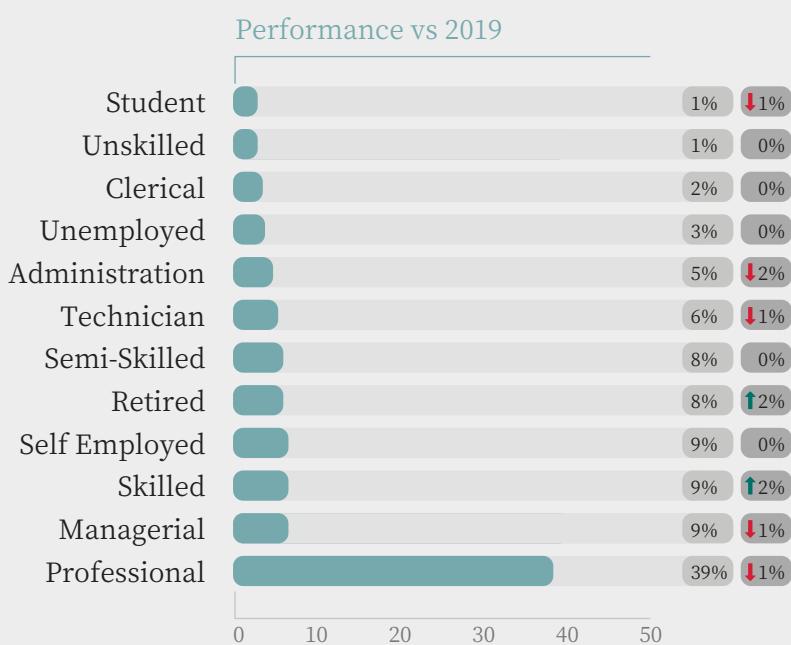
VISITORS BY COUNTRY OF RESIDENCE

The top 15 visitor-generating markets for Eswatini during 2020 remained relatively the same in comparison to the past 5 years. RSA and Mozambique declined by 70%, while visitations from major outbound Europe markets fell by 79.4% in 2020. The share of visitations from SADC countries accounted for 89.6% of arrivals in 2020 compared to a share of 86.7% in 2019. Overall, negative growth was registered in all world regions.

VISITORS BY COUNTRY WORLD REGION

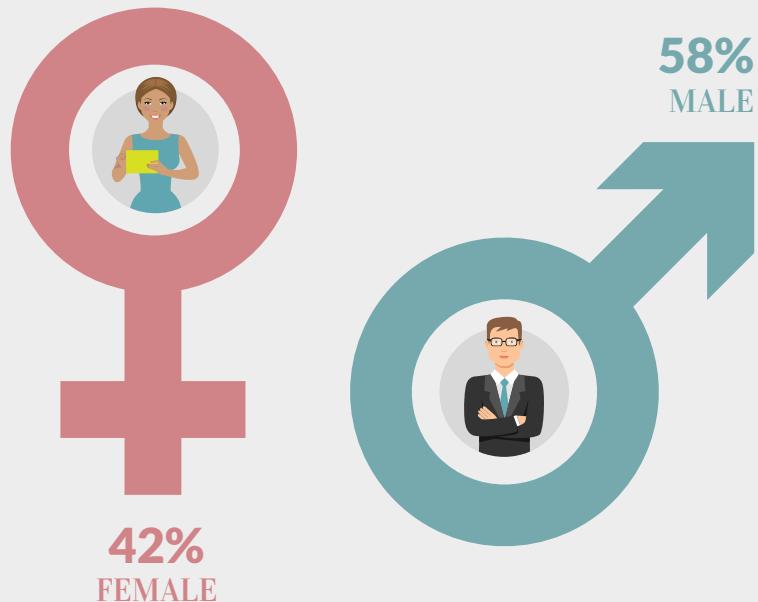


VISITORS BY PROFESSION

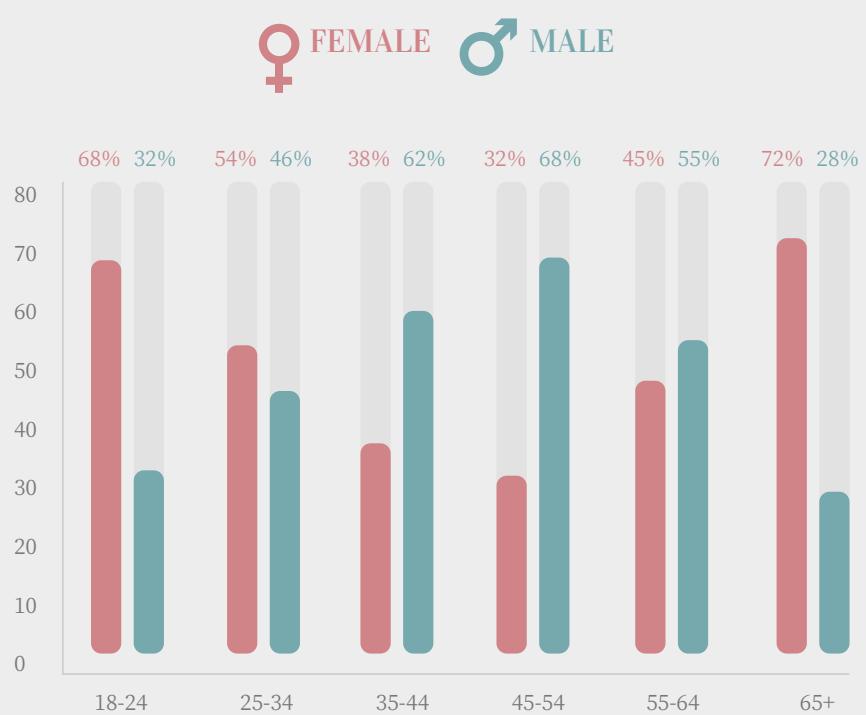


The leading profession category in 2020 remained professionals, although a 1% decline was recorded. Other notable levels of professions for a majority of visitors were managerial, skilled and self-employed with each recording a 9% share of total visitations. Expectedly, most of the professionals travelled alone for business purposes. A negligible growth was observed for retired and skilled visitors, while the administrative segment registered a 2% decline.

SEX OF VISITORS



VISITORS BY AGE AND SEX



06

TRAVEL BEHAVIOUR

HIGHLIGHTS

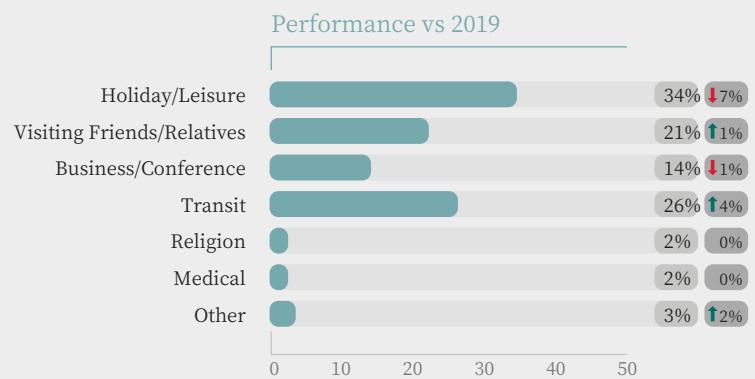
- Reason for Traveling
- Travel Partnership
- Frequency of Visit
- Source of Information
- Port of Entry



Reason for Traveling

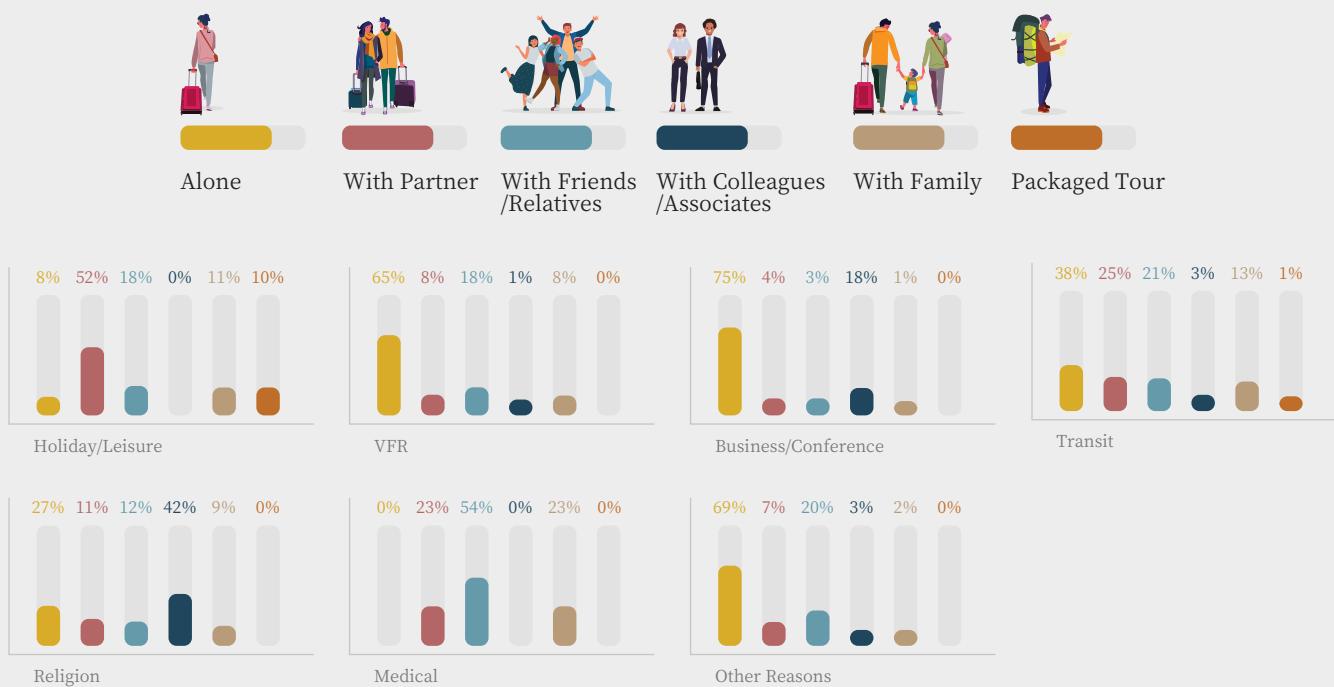
Holiday visits accounted for 34% of total visitors with 63% of these being travellers from overseas markets. Business travel registered a 1% decline year-on-year with relatively high repeat visits that participated in meetings, seminars, exploration of investment opportunities and procurement of goods and services. Those who undertook trips to 'visit friends and relatives' accounted for 102,451 visits and spent an average of 3-4 nights per visit. The transit category – which presents an opportunity for conversion to leisure travel – grew registering a considerable proportion of overall travel in 2020, with 26% travelling for this purpose.

REASON FOR VISIT



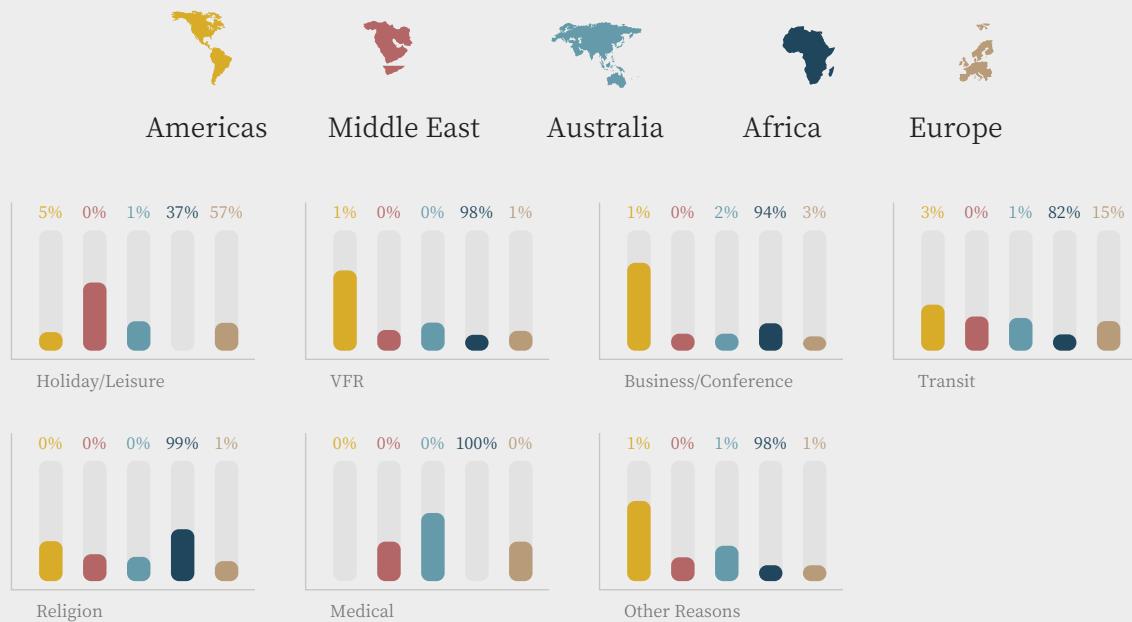
The travel pattern of these categories suggests that a majority of travellers that visited Eswatini for holiday purposes typically travelled with a partner (52%). Expectedly, most travellers that came for business either travelled alone (75%) or with colleagues/ associates (18%). The categories for 'medical' and 'religious' purposes, while lesser in terms of volumes, were largely undertaken as groups with the former travelling mainly with friends and relatives (54%) and the latter with associates (42%).

REASON FOR VISIT BY TRAVEL PARTNERSHIP



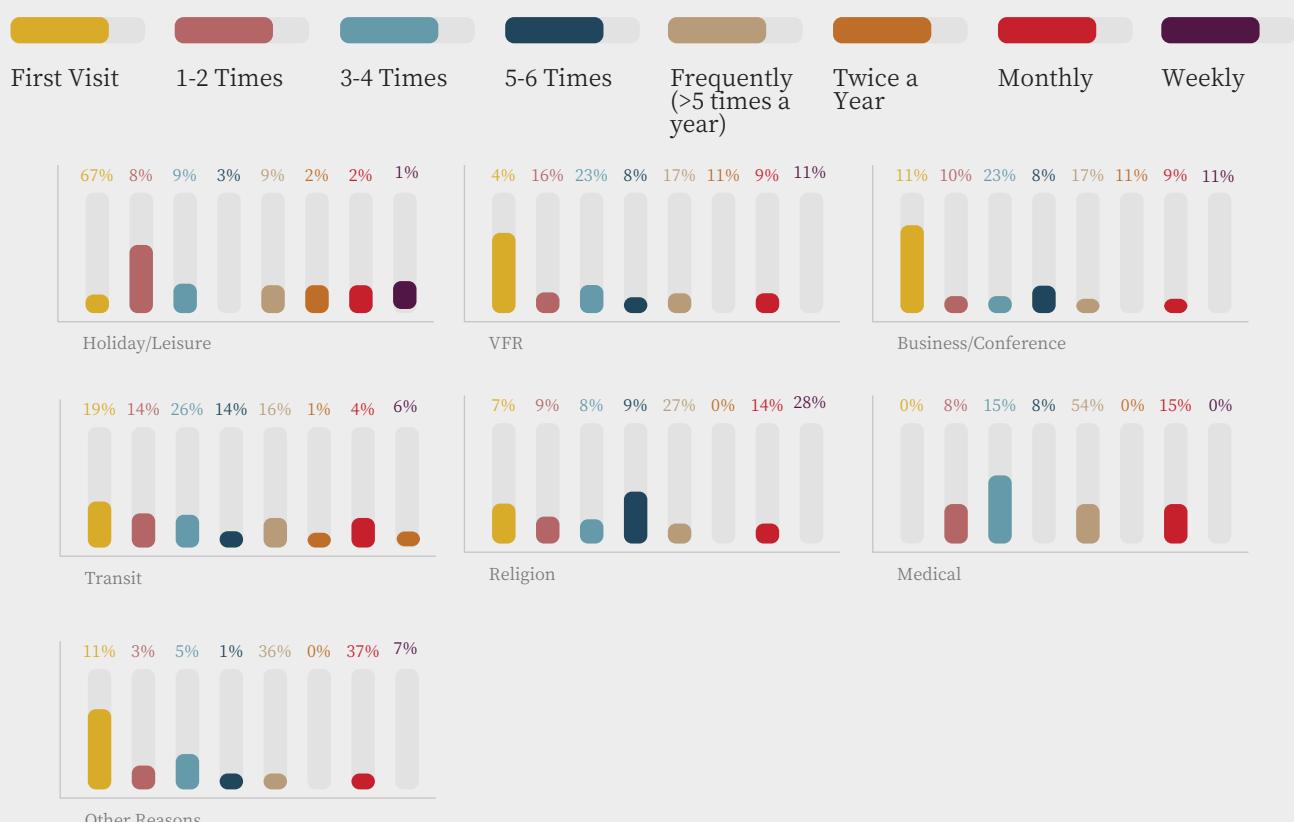
An analysis of visits from a world region perspective typically showed more visitors from the African region compared to any other region within each of the ‘main reason for visit’ categories. However, a significant difference of a fifth was noted for ‘holiday’ category, where the proportion of European holiday visitors accounted for 57% compared to those that came from Africa (37%), suggestive that Europeans largely view Eswatini as a vacation destination.

REASON FOR VISIT BY REGION



2020 saw a large volume of international travellers visiting Eswatini for return visits, with a high proportion of these being people visiting friends and those on transit. Business travellers undertook an average of 3 visits during the year and these mainly originating from Southern Africa. A noteworthy return visits were from the region.

REASON FOR VISIT BY VISIT FREQUENCY

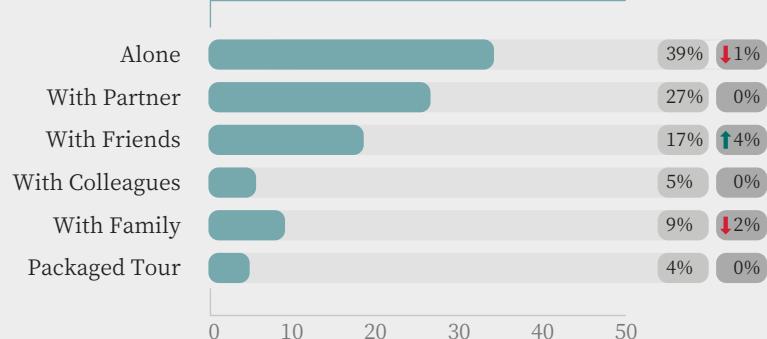


Traveling Partnership

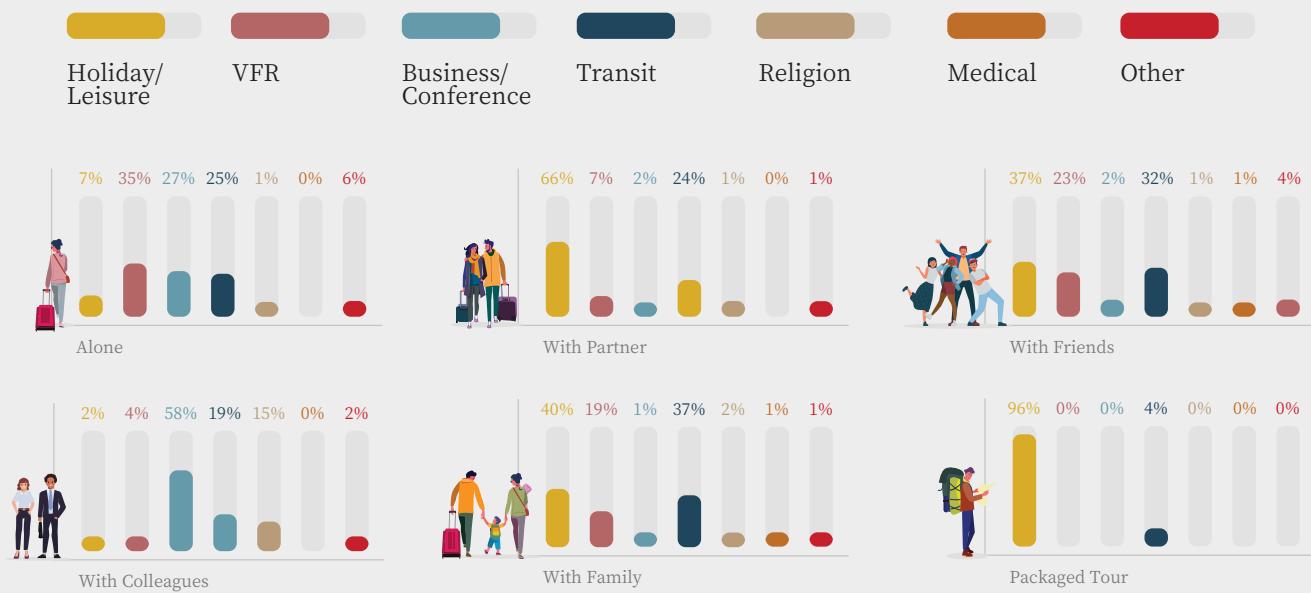
The composition of the 'couple' and 'alone' travel partnerships showed negative growth registering no improvement whilst the latter had a marginal decline respectively. During this period, a majority of visitors to Eswatini typically travelled alone (39%), these mainly aged between 34-44 years (40.9%). Similarly, those that travel as couples were aged 34-44 years and accounted for 27%. By comparison over the same period, a 2 percent decline was noted in family trips as a result of significant declines in overseas arrivals in 2020.

VISITOR TRAVEL PARTNERSHIP

Performance vs 2019

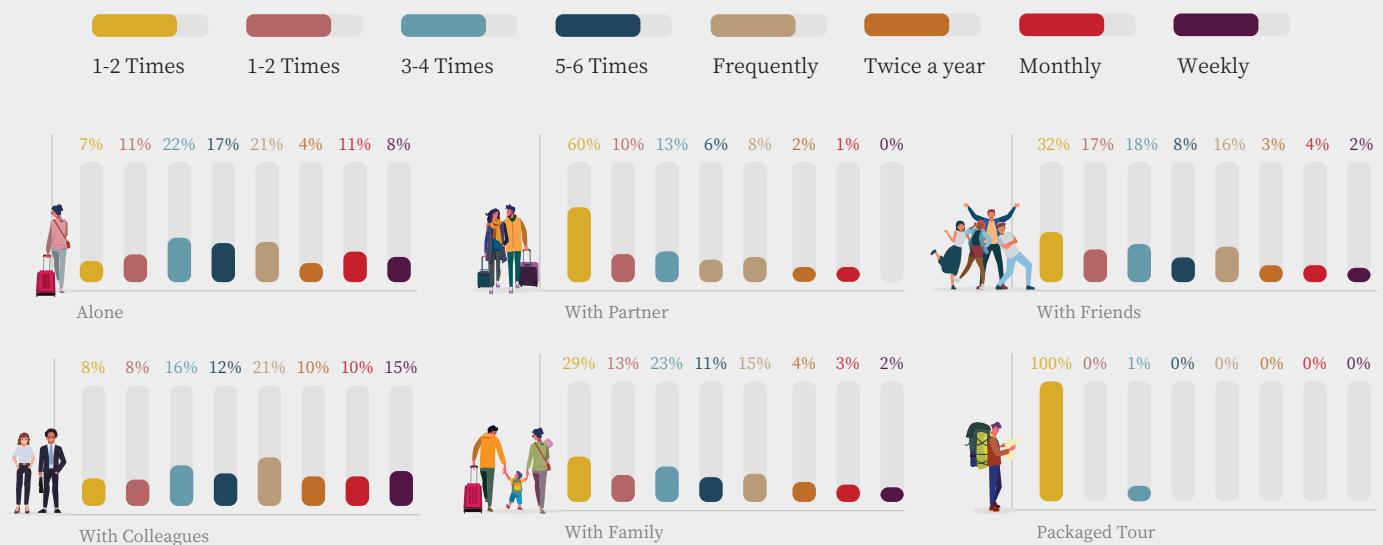


TRAVEL PARTNERSHIP BY REASON FOR VISIT



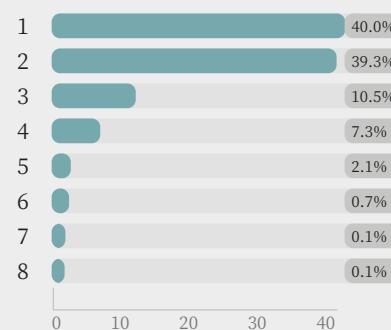
2020 saw a growth in the proportion of the volume and visit frequency of friendship trips, most of which came from South Africa, for holiday/leisure (37%), to visit friends and relatives (23%) and transit (32%). A majority of the couples were first time visitors coming for holiday. Package tour visitors, who mainly comprised of French, German and UK visitors, were mostly first-time visitors with 99% travelling for holiday and leisure purposes. Similarly, European travellers from the Netherlands, France and Germany, as well as South Africa reflected considerable volumes of family vacationing.

TRAVEL PARTNERSHIP BY VISIT FREQUENCY



At least 66% of international visitors travelled in smaller groups, either alone (39%) or as a couple (27%) during the review year. A marginal decline was noted for individual travellers while a 4% rise from 13% in 2019 was recorded for those travelling with a group of friends. Air travellers mainly visited alone with 14.3% of these being on business trips.

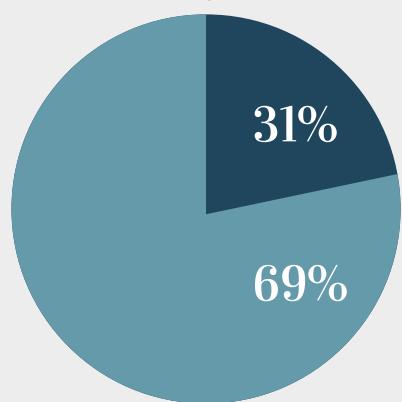
NUMBER OF PEOPLE TRAVELLING WITH YOU



Frequency of Visit

Over two thirds of travellers to the country were repeat visits, these mainly comprising of regional travellers from South Africa (94%), Mozambique (98%), Botswana (60%) and Malawi (69%). The remaining 31% were first time visitors from overseas markets. A year-on-year visitor trend shows that in 2019, a 6% decline was recorded in travellers visiting 1-2 times a year, whilst an increase in the frequent, 5-6 times, and monthly visitations was noted particularly from South Africa and Mozambique for transit and to visit friends and family.

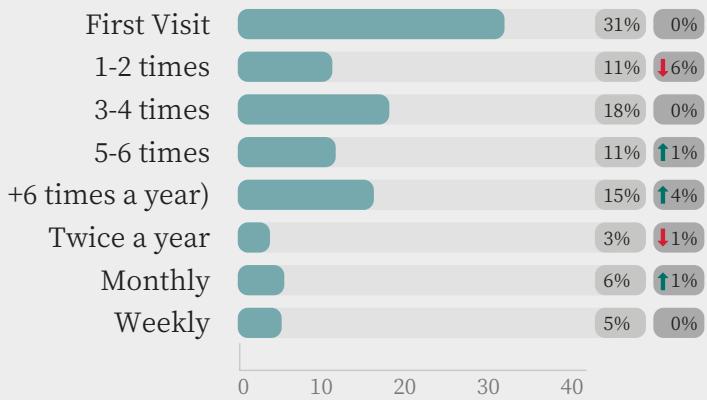
VISIT FREQUENCY



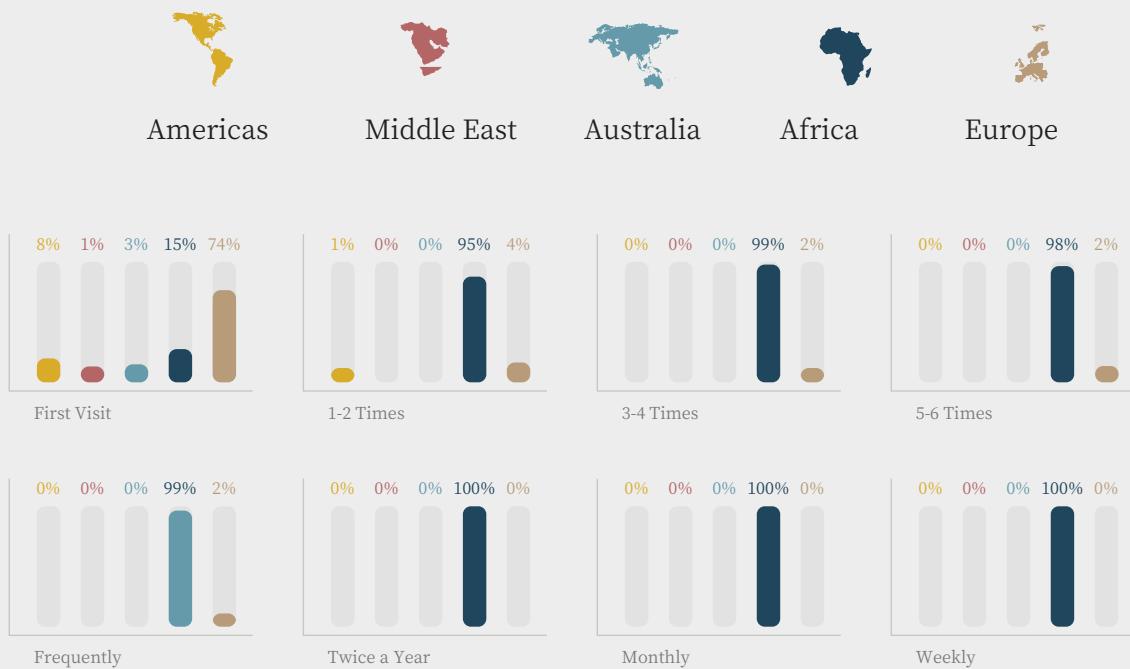
■ First Visit
■ Return Visit

FREQUENCY OF VISIT

Performance vs 2019

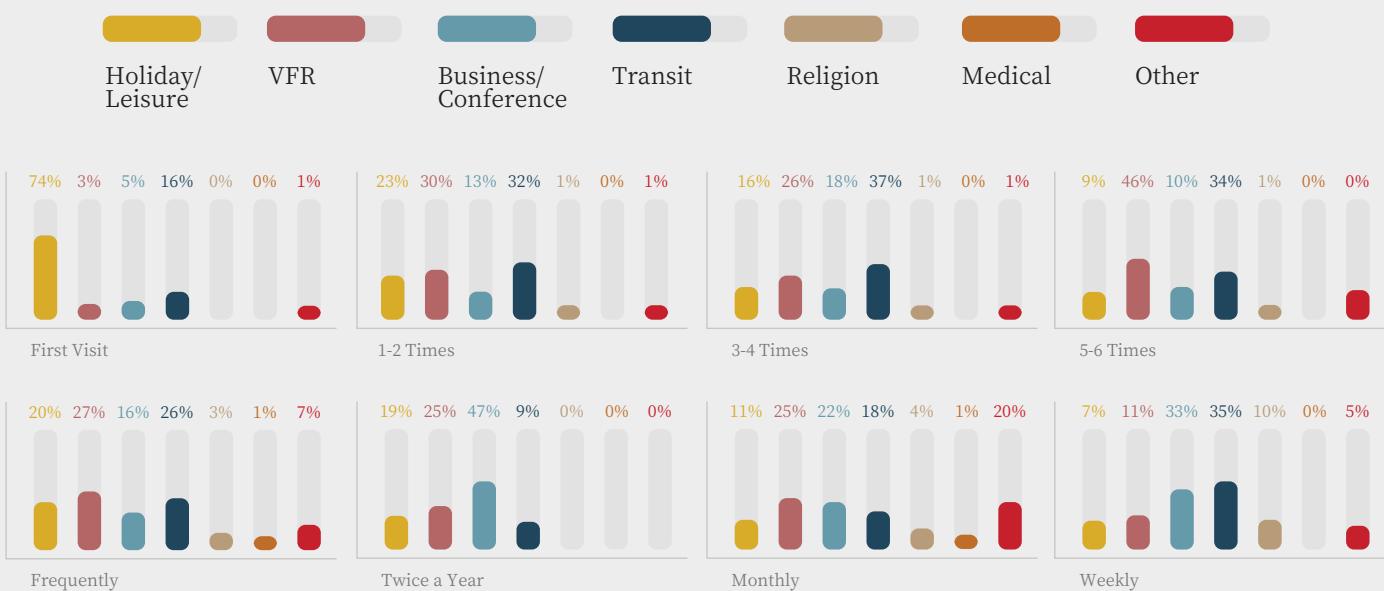


VISIT FREQUENCY BY WORLD REGION



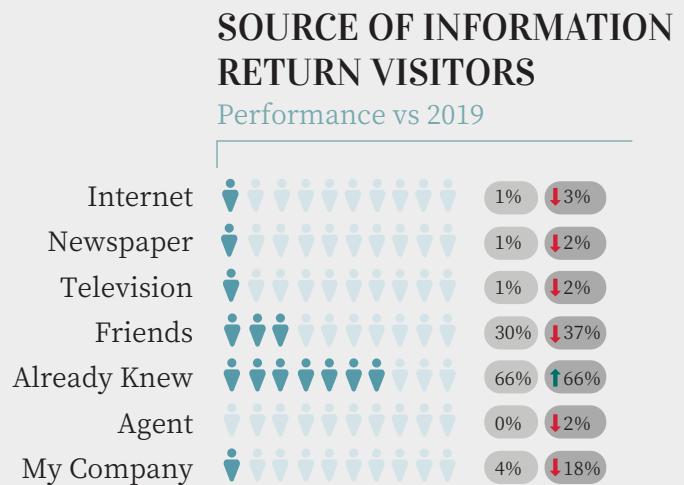
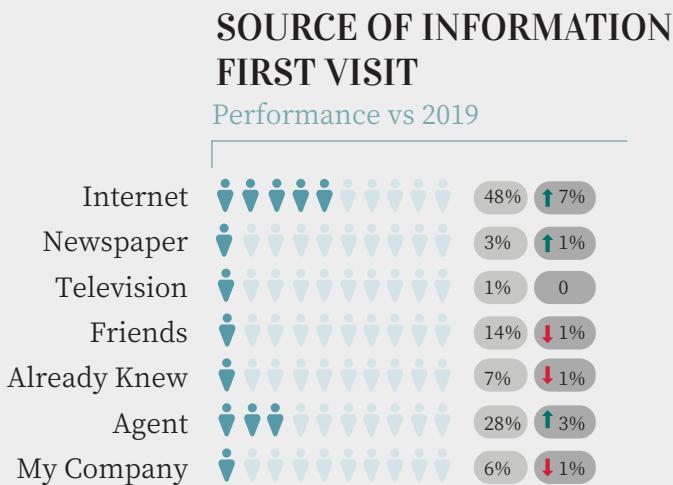
During the review period, the European market accounted for a majority of first-time visitors to Eswatini (74%) compared to other regions. While the African market generally accounts for the highest size of repeat visitors, in 2020, the East-African markets ranked second highest in first time visitors. In terms of proportions, 74% of first-time visits were for holiday purposes and about 16% were transiting through the country. On average, one in four visitors tend to return for holidays, while almost half (47%) of visitors who come back to the country twice a year do so for business. A significant 46% of visitors who made at least 5 return visits in 2020 were visiting friends and family.

VISIT FREQUENCY BY REASON FOR VISIT

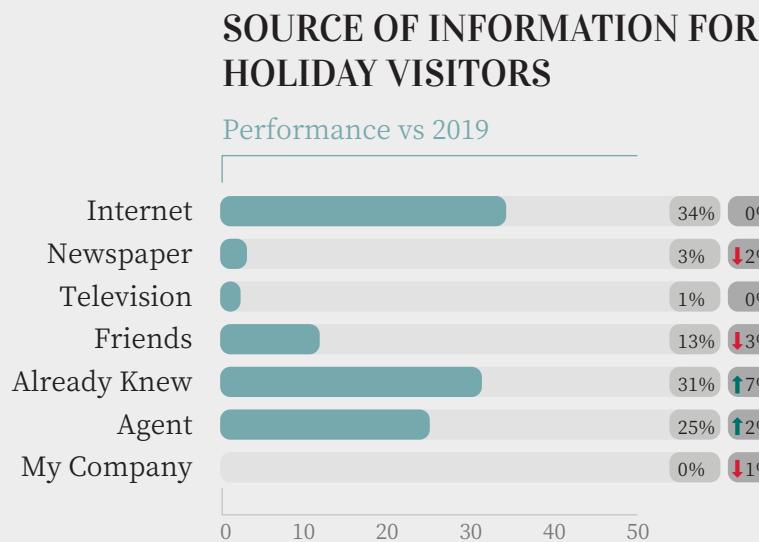


Source of Information

The internet remained the leading source of information about Eswatini for most first-time visitors, which saw the users increase by 7% compared to the other sources. Most internet users came for holiday (76.2%) with the remaining 23.5% constituting transit travellers. During this period, the majority of internet users were noted to be couples (65.4%). Tour operators and travel agents (8.7%) formed another key source of travel information to Eswatini, with 96.2% of holiday visitors having engaged a travel agent, and 37.9% of packaged tours attributed to tour operator itineraries. The use of digital and print media declined marginally and this was mainly noted for European and Australasian markets. Similarly, referrals from friends and relatives recorded a decline.

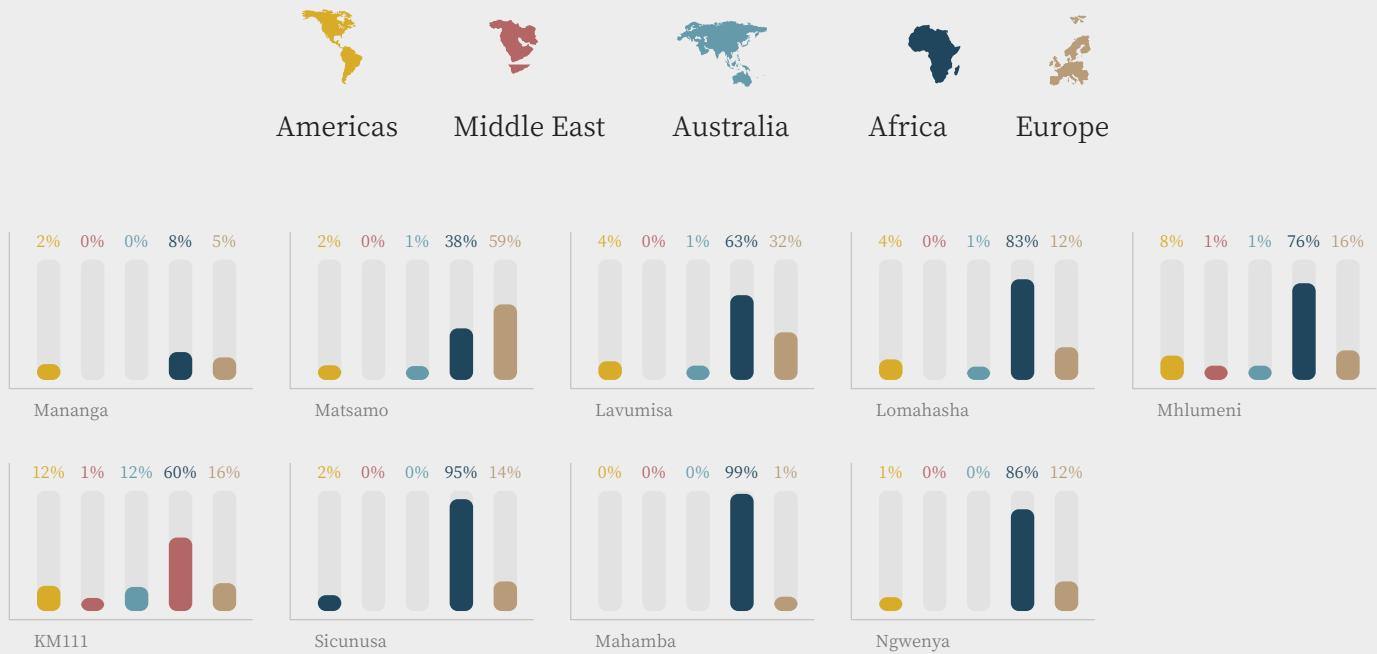


Holiday travellers opted for online resources to gather information on travel and plan their trip. About 34% of travellers utilized the internet for travel planning, with no growth when compared to 2019. The use of travel agents and tour operators also increased by 2% during this period. The proportion of visitors whose source of information about the country was from their friends declined by 3%, whilst those that already knew grew by 7% in the last year.



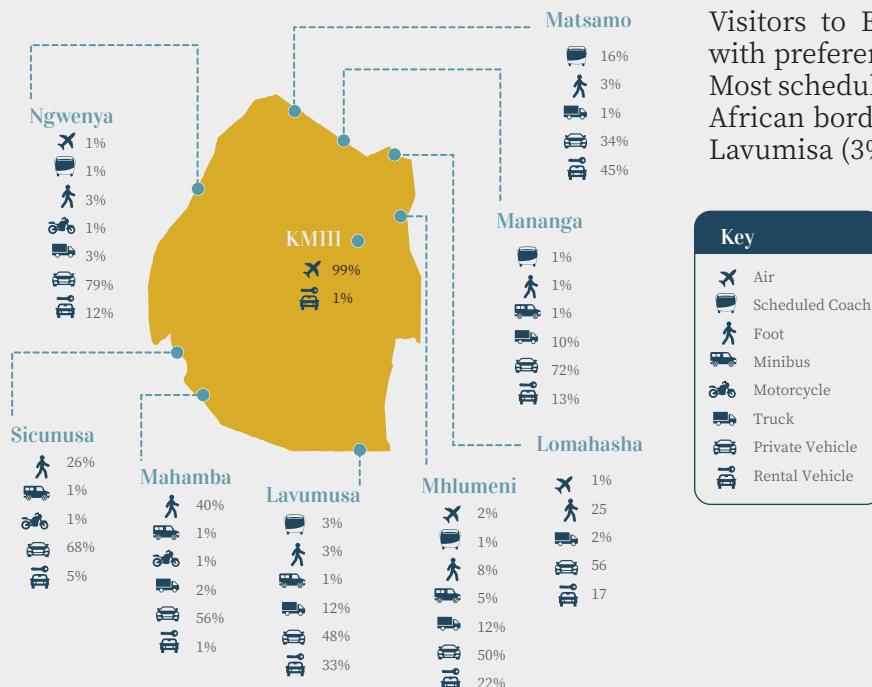
Most Europeans used the Lavumisa border as the main port of entry with Germans attributing 10.9% total arrivals and 10.2% were from France. Mhlumeni (56.6%) and Lomahasha (64.2%) understandably had more Mozambique natives coming utilizing that border.

PORT OF ENTRY BY REGION



Port of Entry

PORT OF ENTRY BY MODE OF TRANSPORT

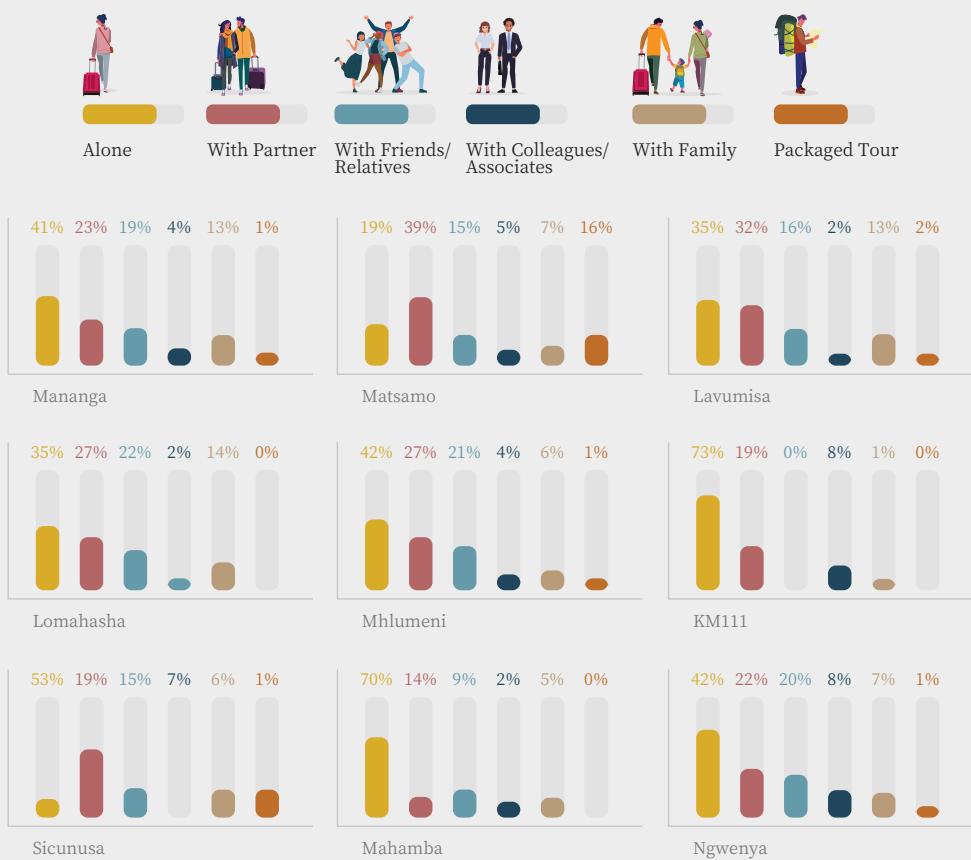


Visitors to Eswatini mainly travelled by road, with preference for use of private or rental cars. Most scheduled coaches came through the South African borders specifically Matsamo (16%) and Lavumisa (3%).

Key	
Air	
Scheduled Coach	
Foot	
Minibus	
Motorcycle	
Truck	
Private Vehicle	
Rental Vehicle	

The distribution of visitors by travel partnership categories of ‘individual’, ‘with partner’ and ‘with friends and relatives’ tends to be evenly distributed amongst the ports of entry. Lavumisa Border Post registered a 13% decline in the volume of packaged tour travellers in the last year, while Matsamo registered a reasonable 16% with most visitors combining their visit to Eswatini with Kruger National Park and the KwaZulu-Natal Wetlands. Ngwenya Border Post remained the main gateway for African arrivals with 23.6% of this market utilizing this port in 2020.

PORt OF ENTRY BY TRAVEL PARTNERSHIP



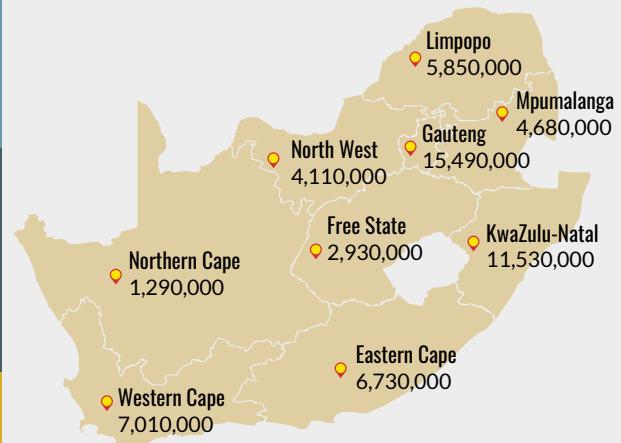
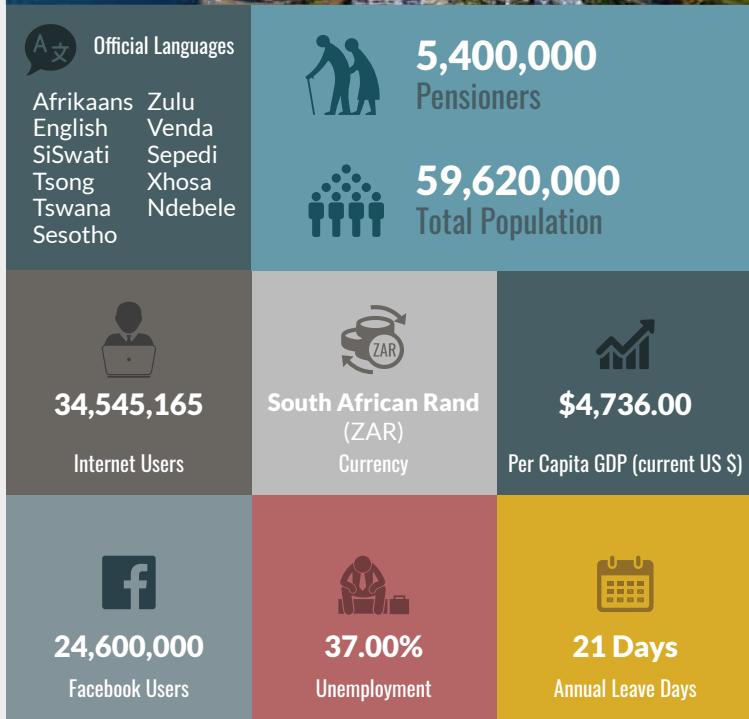
07

COUNTRY PROFILES

HIGHLIGHTS

RSA
Mozambique
Germany
France
United Kingdom
Netherlands
USA



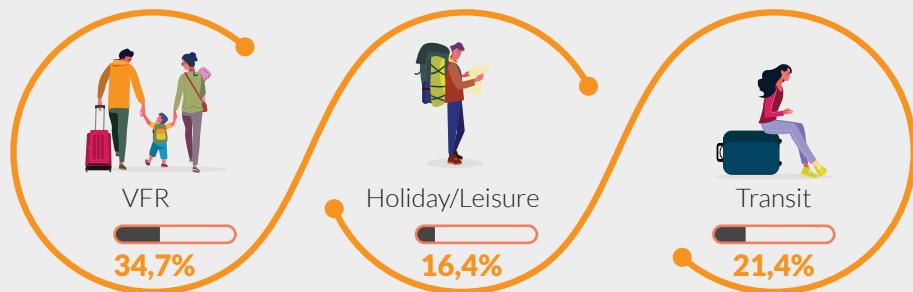


Average Annual expenditure (ZAR)	
Food & non-alcoholic drinks	8 081
Alcoholic drink, tobacco & narcotics	2 046
Clothing & footwear	7 522
Housing, fuel & power	2 458
Health	3 091
Transport	8 35
Communication ³	2 33
Recreation & culture ³	8 36
Education	1 042
Restaurants & hotels	4 684
Miscellaneous goods and services	





What is the reason for your visit?



Number of Nights



Who are you travelling with?



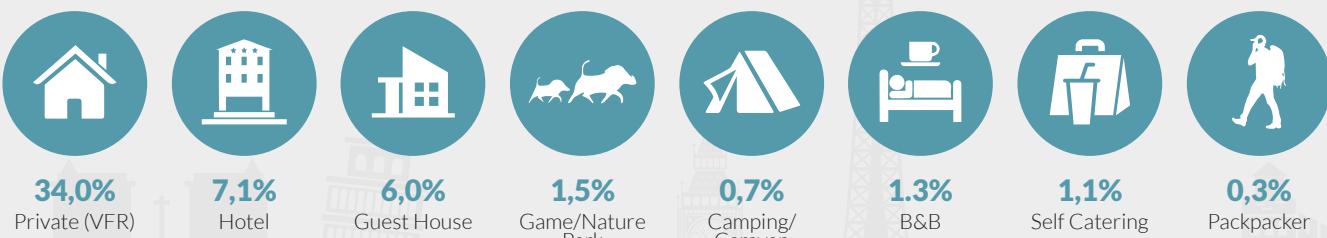
FREQUENCY OF VISIT

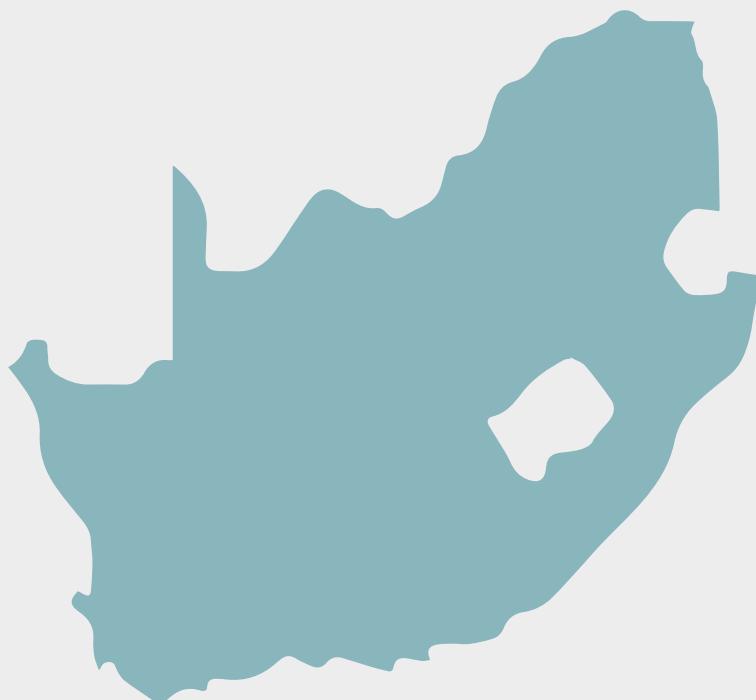


AGE GROUPS



ACCOMMODATION





**Peaceful
Beautiful Country
Safe
Clean
Friendly People
Culture
Good Roads
Scenery
Good Service
Kingdom**

Recommendations

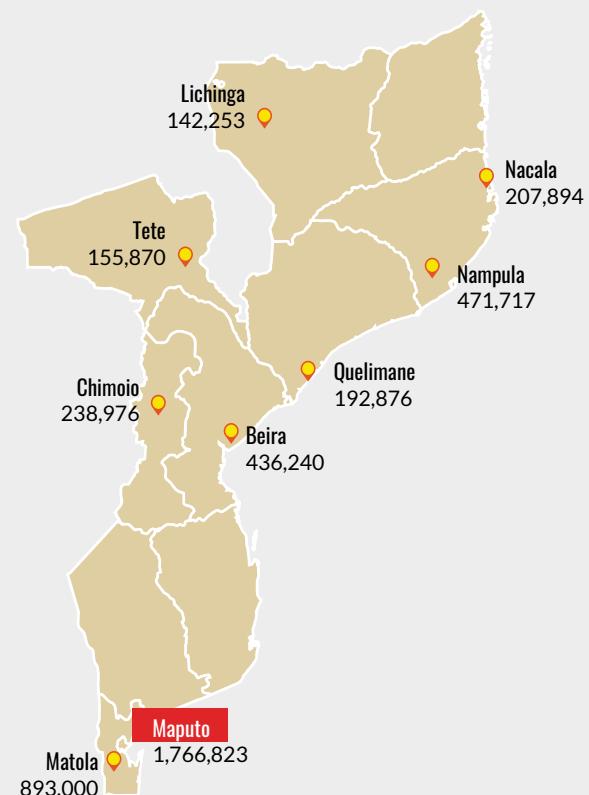
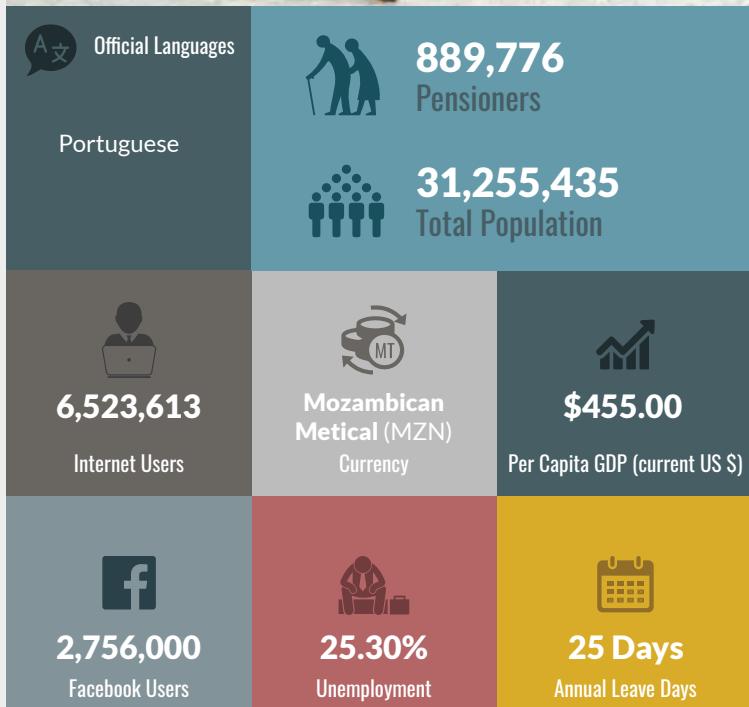


Highlights



Complaints





Average Annual expenditure (MT)	
Broken rice	7 540
Bread	4 800
Gasoline	1 5000
Medicine	1 210
Tuition fees	1 0900
Cornflour	5





What is the reason for your visit?



Number of Nights



Who are you travelling with?



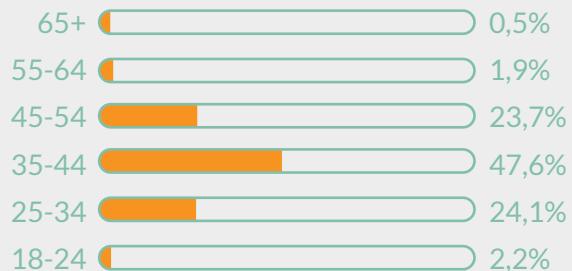
South African Visitors



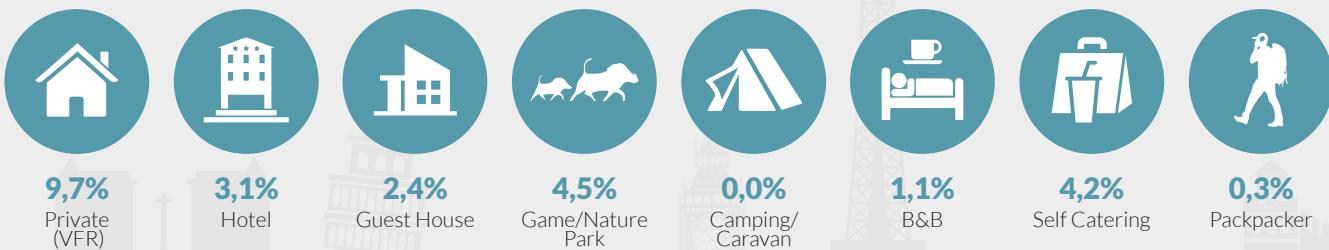
FREQUENCY OF VISIT

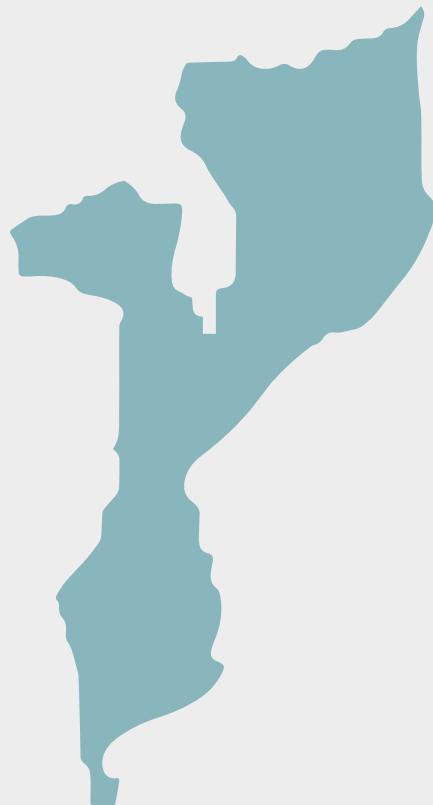


AGE GROUPS



ACCOMMODATION





Small Country
Safe
Developing Country
Clean
Peaceful
Friendly
Wildlife
Beautiful Country
Beautiful Scenery
Nice Weather

Recommendations



Highlights

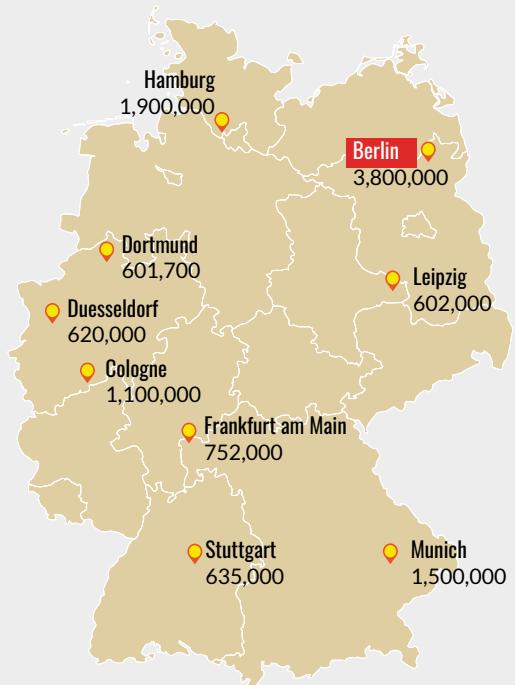


Complaints

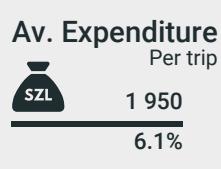
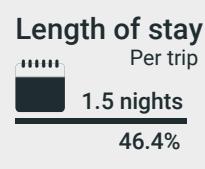




BEER FESTIVAL



Average Annual expenditure (€)	
Food & non-alcoholic drinks	4 272
Alcoholic drink, tobacco & narcotics	1 272
Clothing & footwear	1 2372
Housing, fuel & power	1 248
Transport	4 212
Communication ³	780
Recreation & culture ³	3 408
Education	2 52
Restaurants & hotels	1 884
Miscellaneous goods and services	1 176





What is the reason for your visit?



Number of Nights



Who are you travelling with?



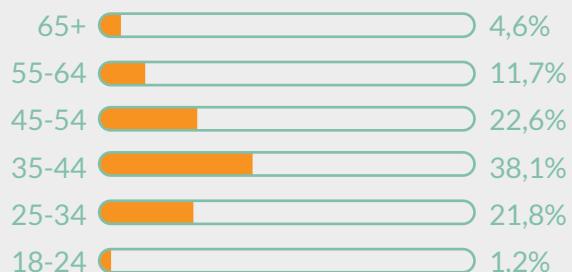
South African Visitors



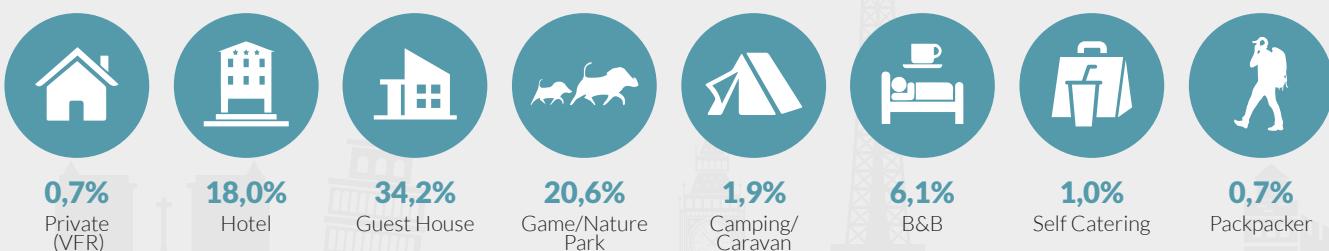
FREQUENCY OF VISIT

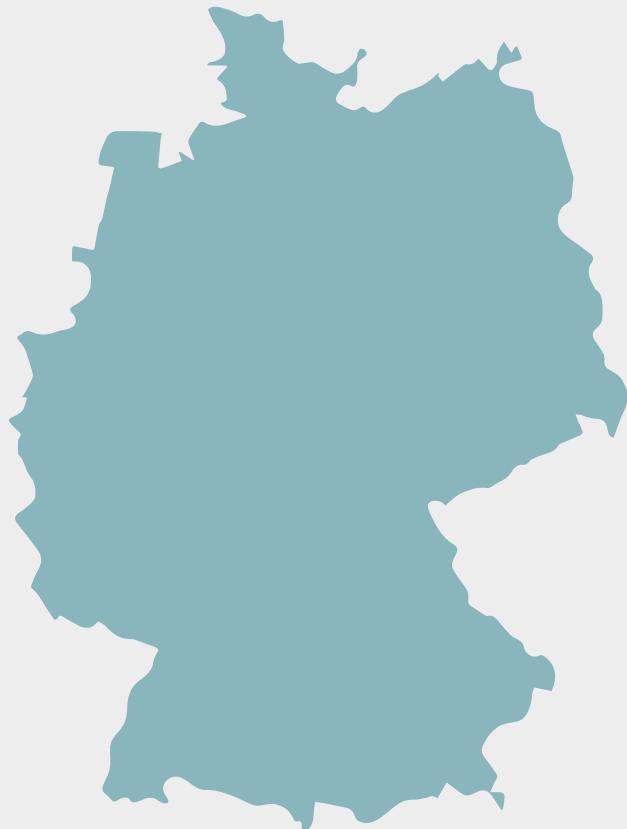


AGE GROUPS



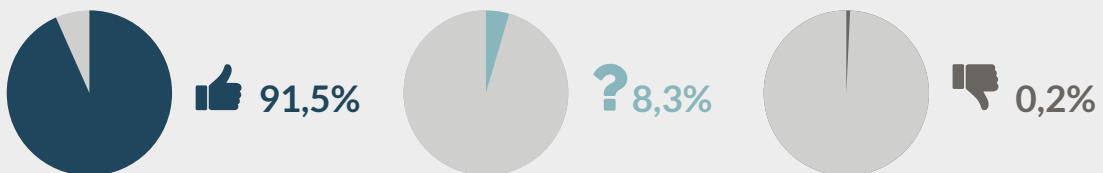
ACCOMMODATION



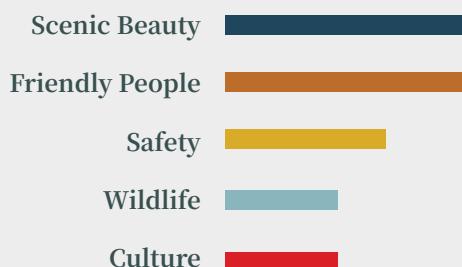


Small Country
Beautiful Country
Poor Country
Safe
Peaceful
Friendly
Wildlife
Beautiful Culture
Poor Roads
Clean

Recommendations

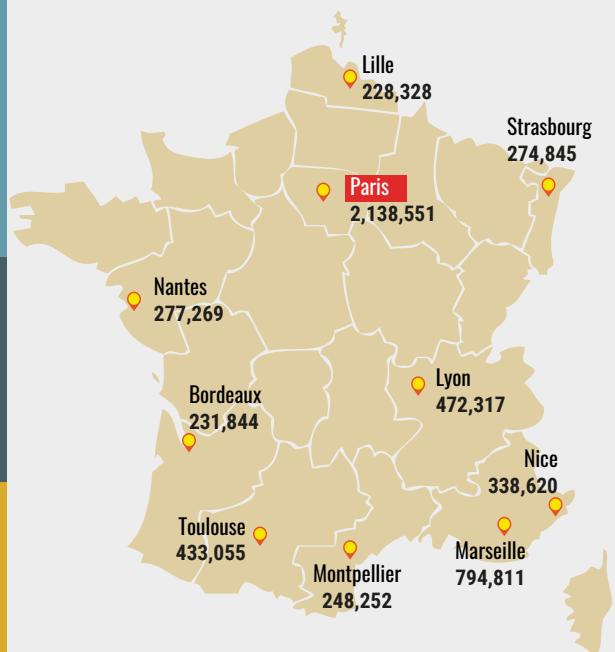
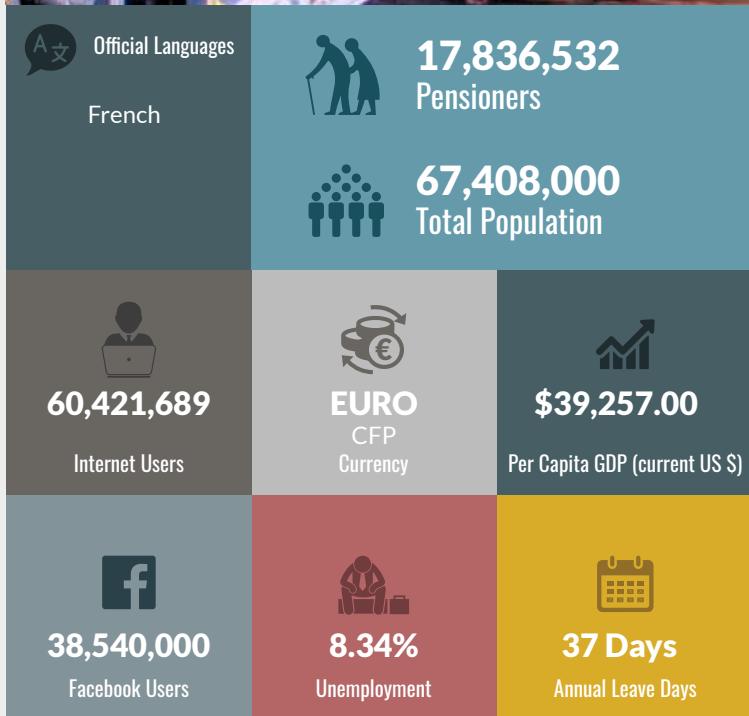


Highlights

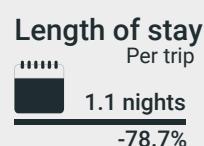


Complaints





Average Annual expenditure (€)	
Food & non-alcoholic drinks	4 237
Alcoholic drink, tobacco & narcotics	742
Clothing & footwear	1 172
Housing, fuel & power	8 569
Health	467
Transport	3 916
Communication ³	698
Recreation & culture ³	2 295
Education	175
Restaurants & hotels	1 618
Miscellaneous goods and services	4 357





What is the reason for your visit?



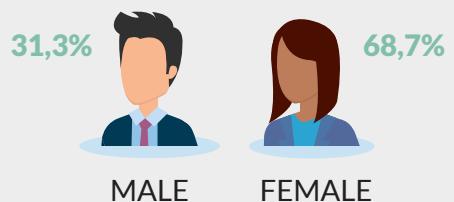
Number of Nights



Who are you travelling with?



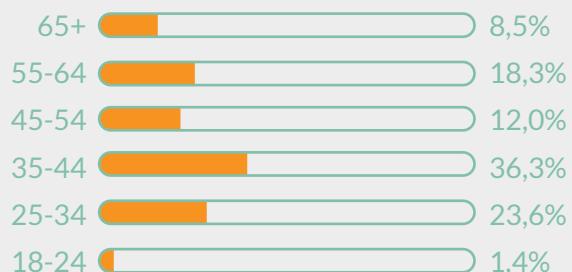
South African Visitors



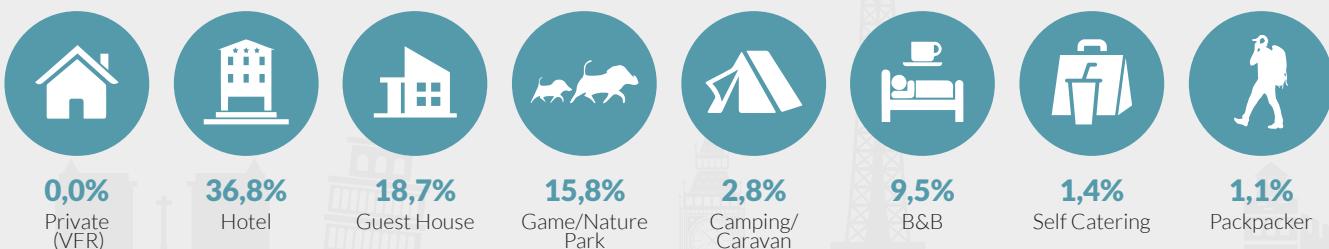
FREQUENCY OF VISIT

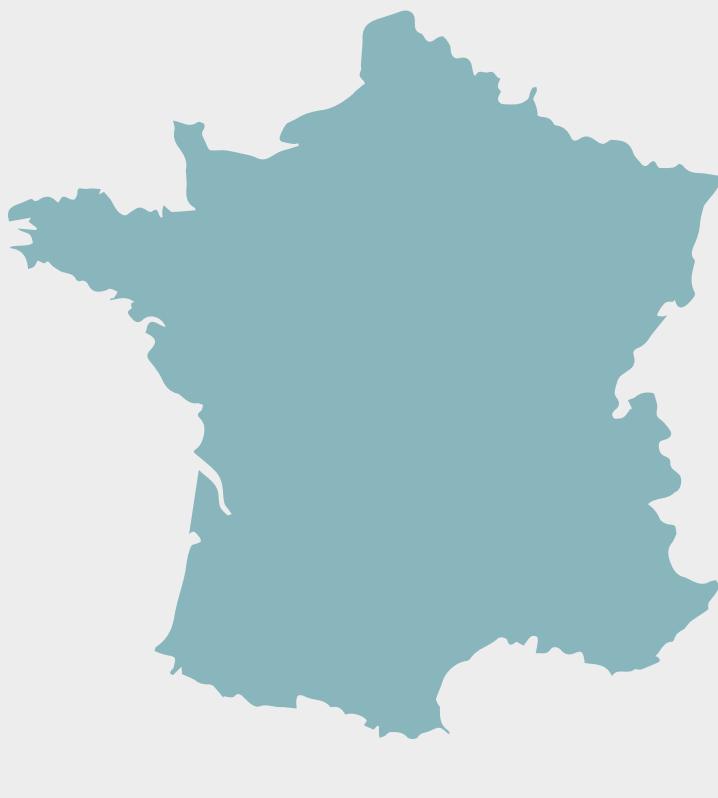


AGE GROUPS



ACCOMMODATION



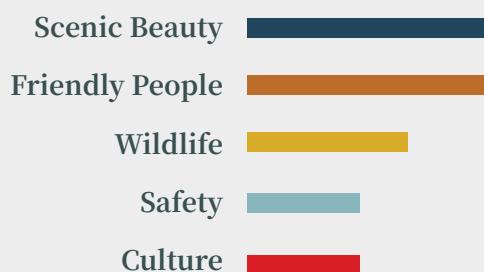


Small Country
Beautiful Country
Beautiful Culture
Safe
Poor Country
Friendly People
Poor Roads
Already Knew
Good Service
Wildlife

Recommendations

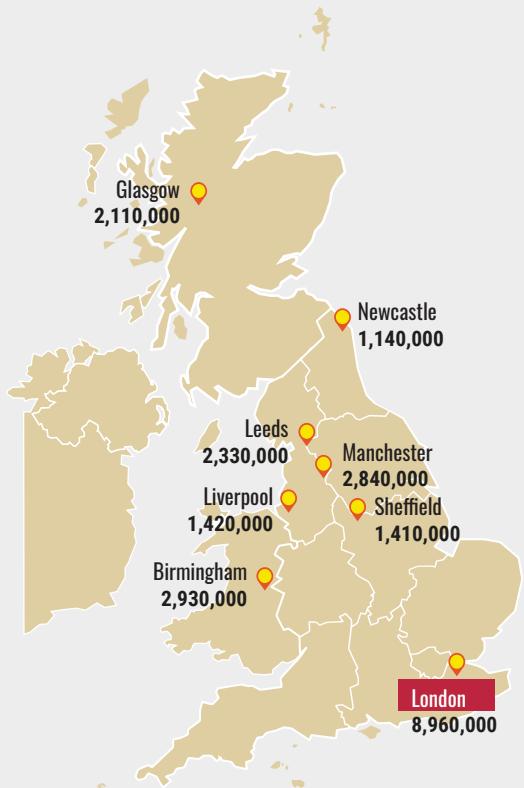
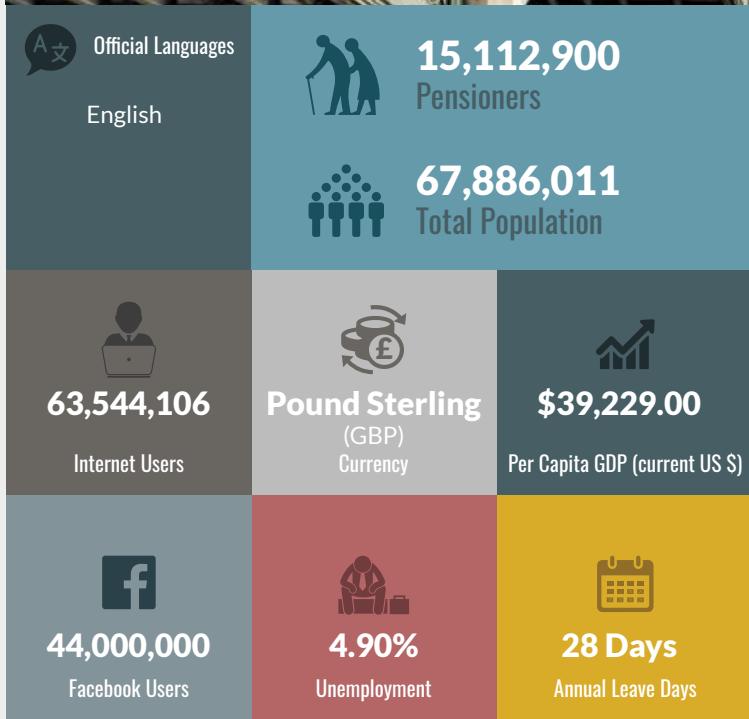


Highlights



Complaints





Average Annual expenditure (£)	
Food & non-alcoholic drinks	3 312
Alcoholic drink, tobacco & narcotics	671
Clothing & footwear	1 217
Housing, fuel & power	6 214
Health	426
Transport	4 243
Communication ³	1 113
Recreation & culture ³	3 890
Education	234
Restaurants & hotels	2 751
Miscellaneous goods and services	2 376





What is the reason for your visit?



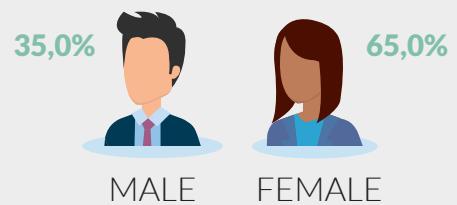
Number of Nights



Who are you travelling with?



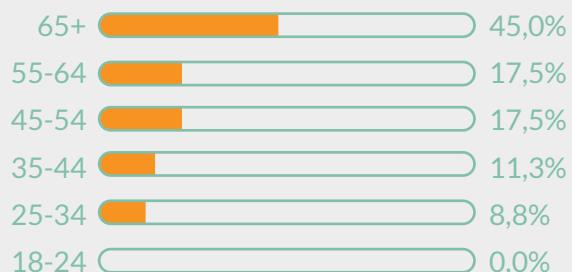
South African Visitors



FREQUENCY OF VISIT



AGE GROUPS



ACCOMMODATION



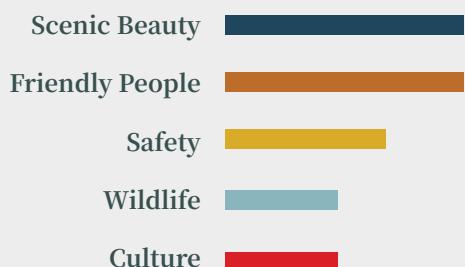


**Small Country
Safe
Beautiful Scenery
Culture
Wildlife
Developing Country
Clean Country
Nice Weather
Good Service
Wildlife**

Recommendations

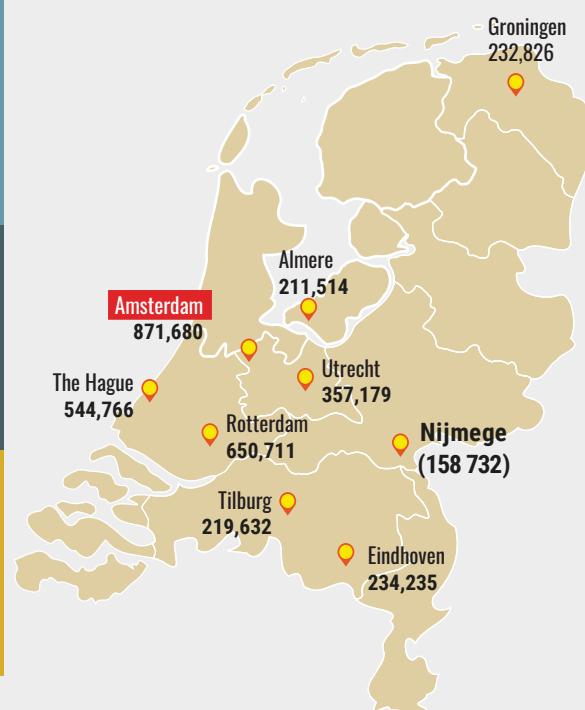
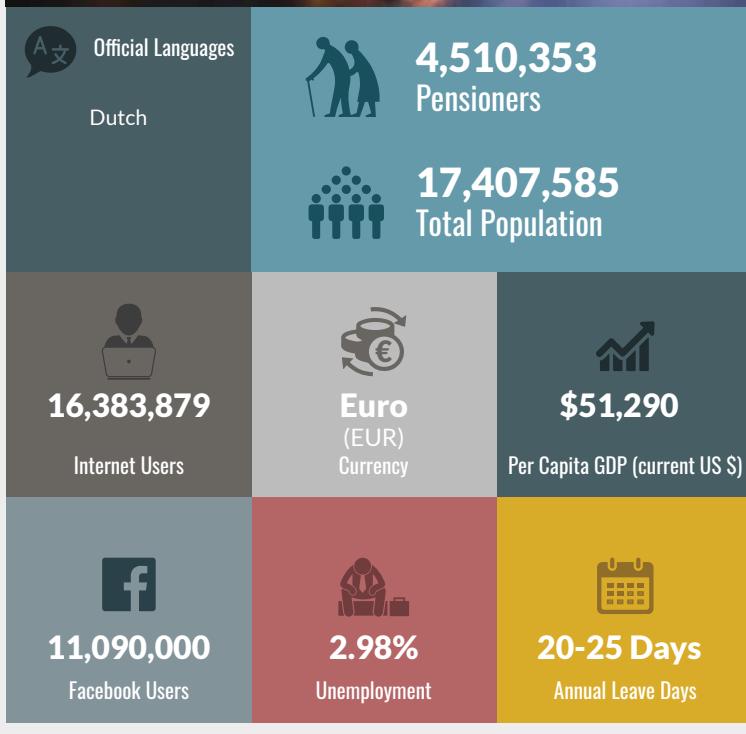


Highlights

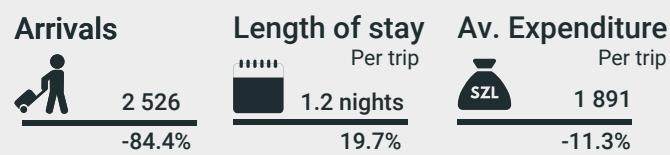


Complaints





Average Annual expenditure (€)	
Food & non-alcoholic drinks	3458
Alcoholic drink, tobacco & narcotics	942
Clothing & footwear	1476
Housing, fuel & power	9925
Health	424
Transport	4087
Communication ³	1048
Recreation & culture ³	2735
Education	427
Restaurants & hotels	1868
Miscellaneous goods and services	4561





What is the reason for your visit?



Number of Nights



Who are you travelling with?



South African Visitors



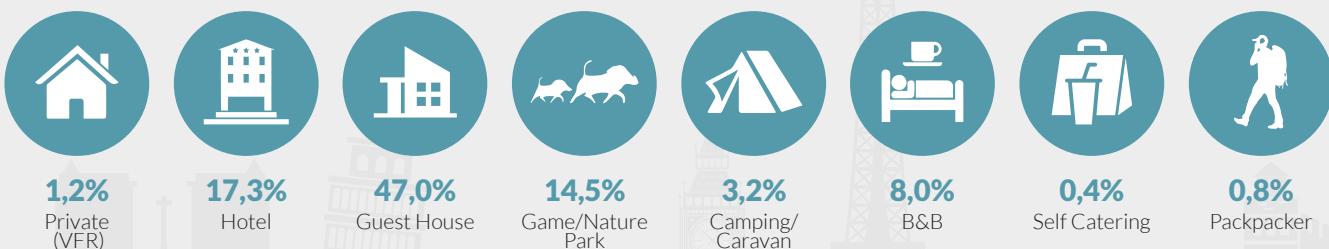
FREQUENCY OF VISIT



AGE GROUPS



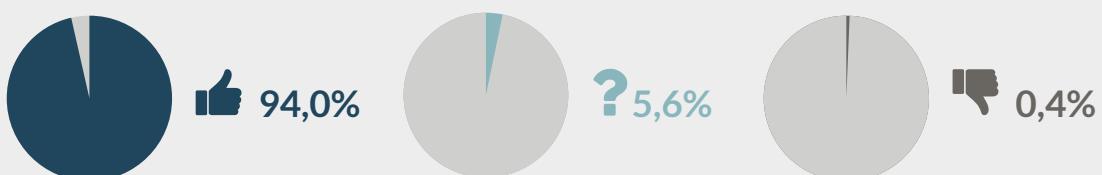
ACCOMMODATION



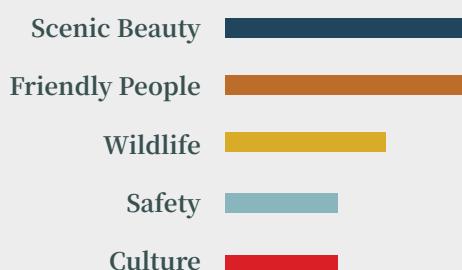


Small Country
Beautiful Country
Safe
Poor Country
Beautiful Scenery
Friendly People
Poor Roads
Wildlife
Already Knew
Poor Internet

Recommendations

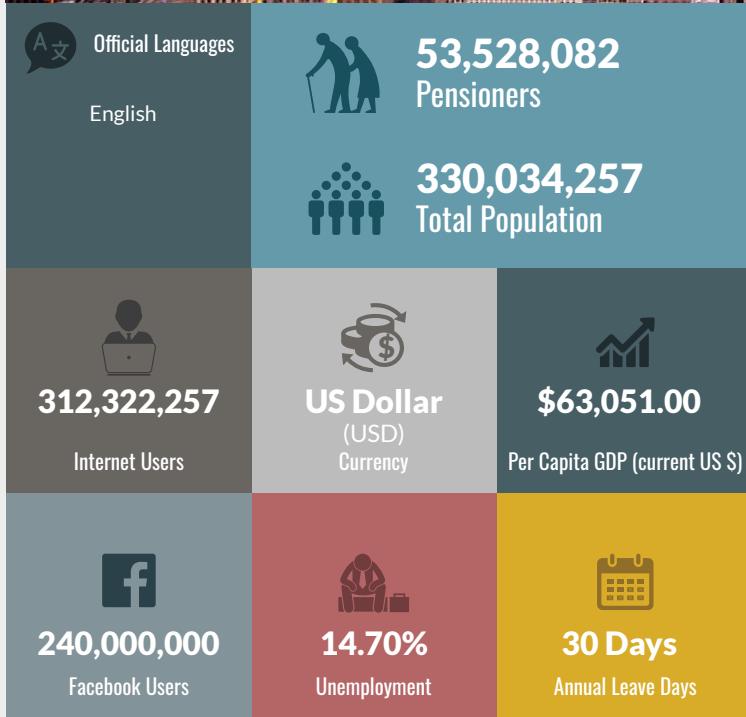


Highlights



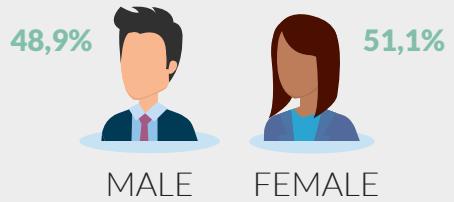
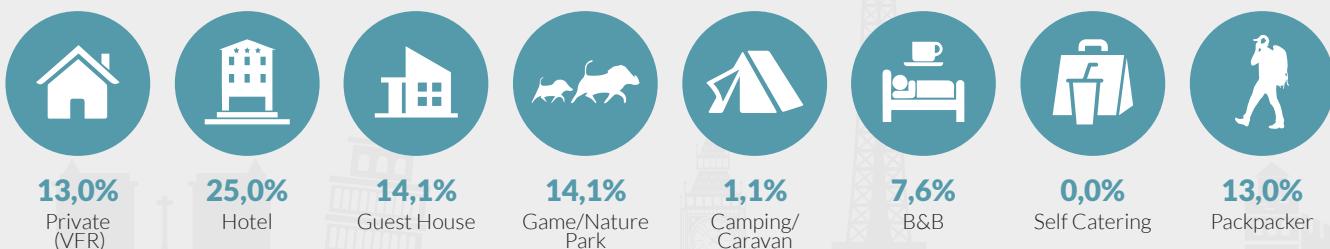
Complaints

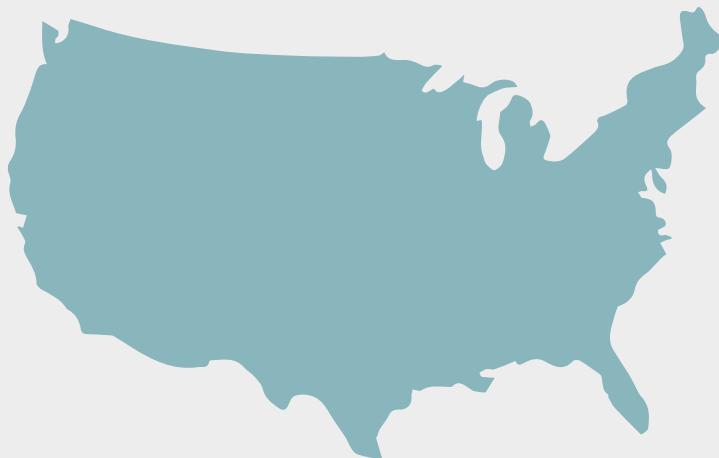




Average Annual expenditure (\$)	
Food & non-alcoholic drinks	8169
Alcoholic drink, tobacco & narcotics	786
Clothing & footwear	20679
Housing, fuel & power	5193
Health	10742
Transport	Communication ³
Recreation & culture ³	3050
Education	1443
Restaurants & hotels	1891
Miscellaneous goods and services	



**What is the reason for your visit?****Number of Nights****Who are you travelling with?****South African Visitors****Frequency of Visit****AGE GROUPS****Accommodation**

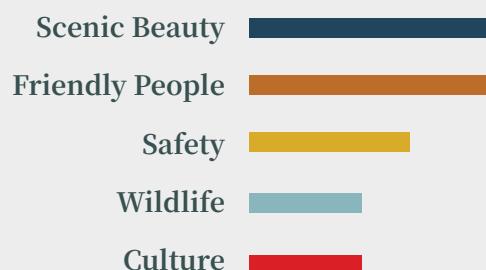


Small Country
Poor Country
Poor Roads
Safe
Beautiful Country
High HIV Rate
Beautiful Scenery
Nice Weather
Peaceful
Beautiful Culture

Recommendations



Highlights



Complaints





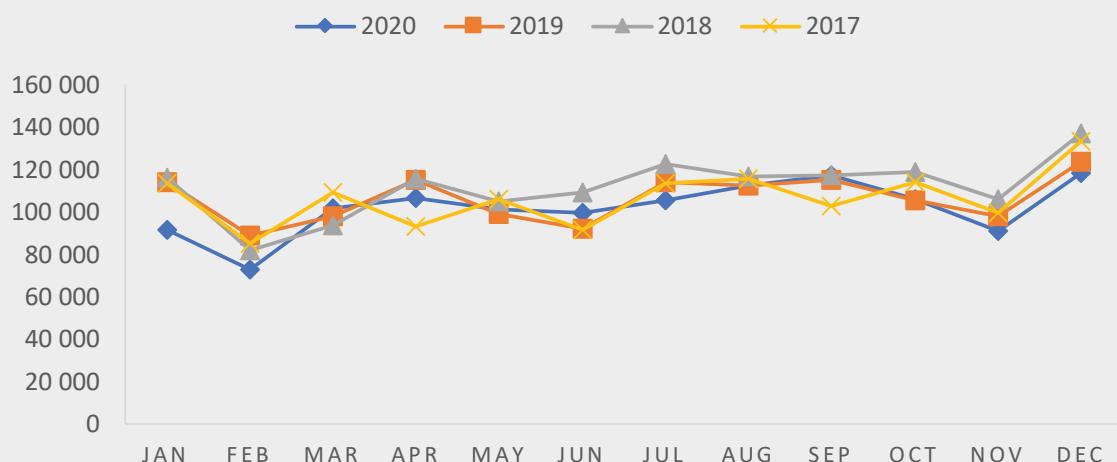
08

SEASONALITY

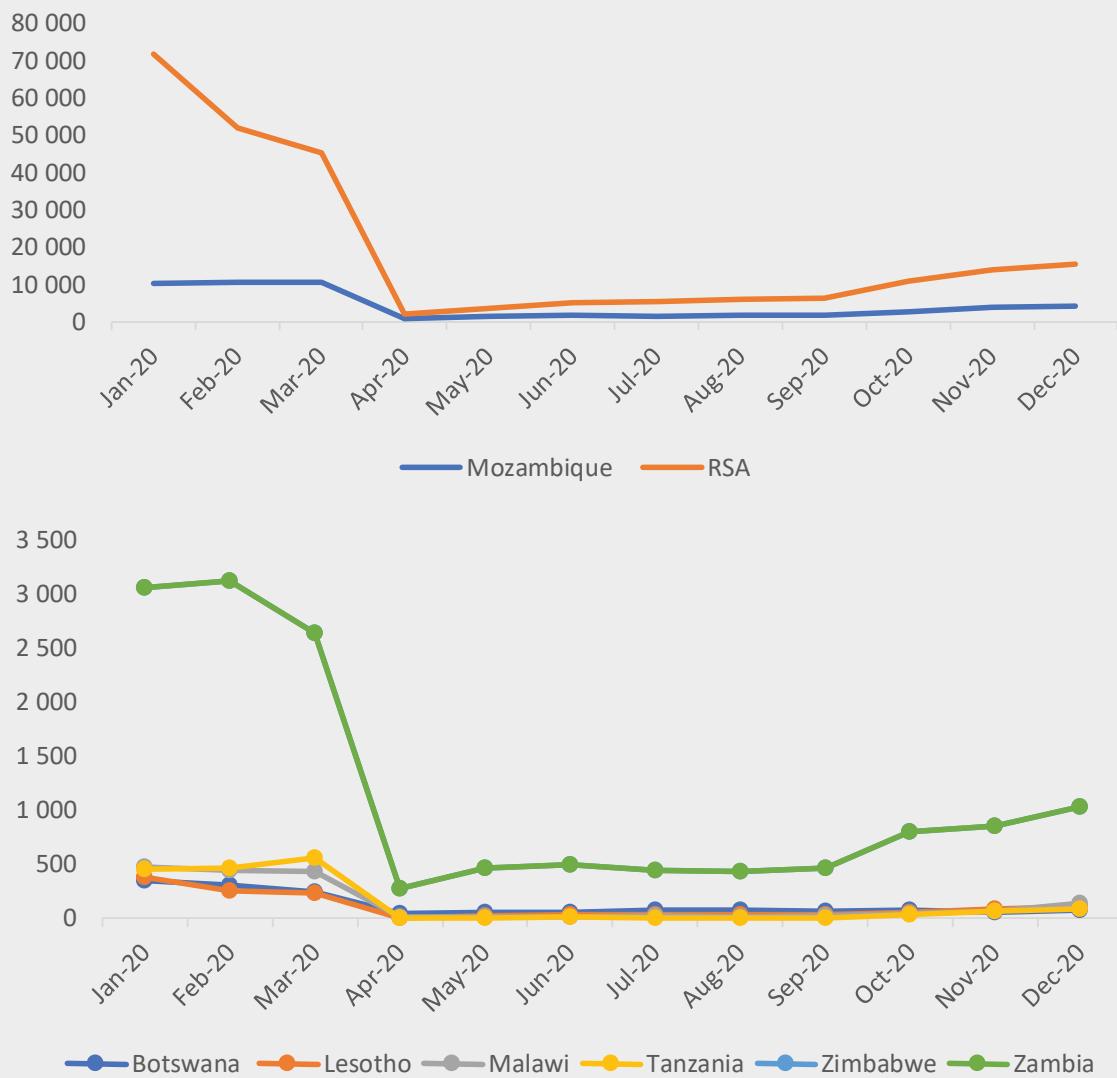
HIGHLIGHTS

International Vistor Arrivals by Month
Top 8 SADC Markets
Sub Sahara Africa Arrivals European Arrivals
Americas and Australasia Arrivals

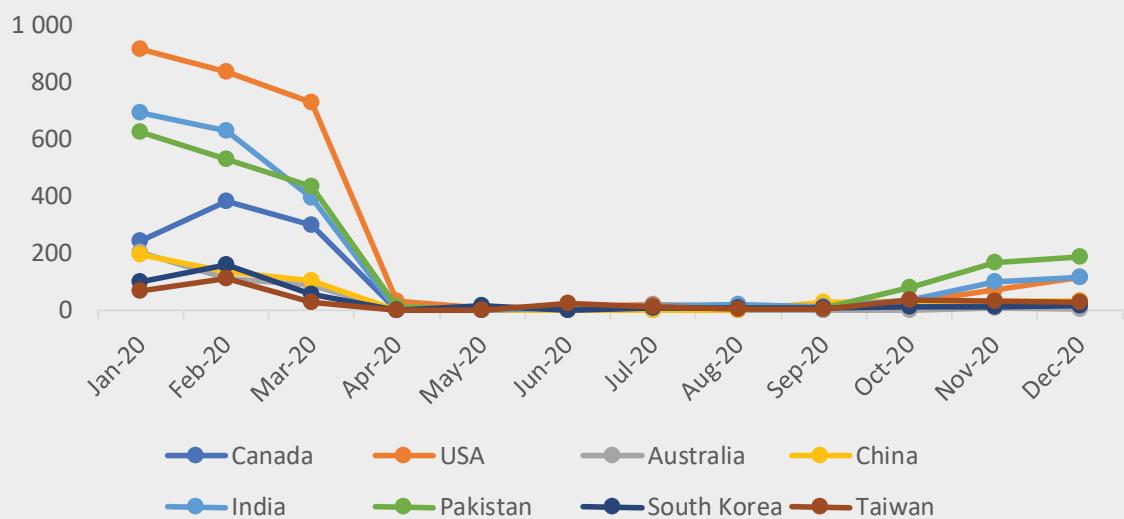
International Visitor Arrivals to Eswatini by Month, 2017-2020



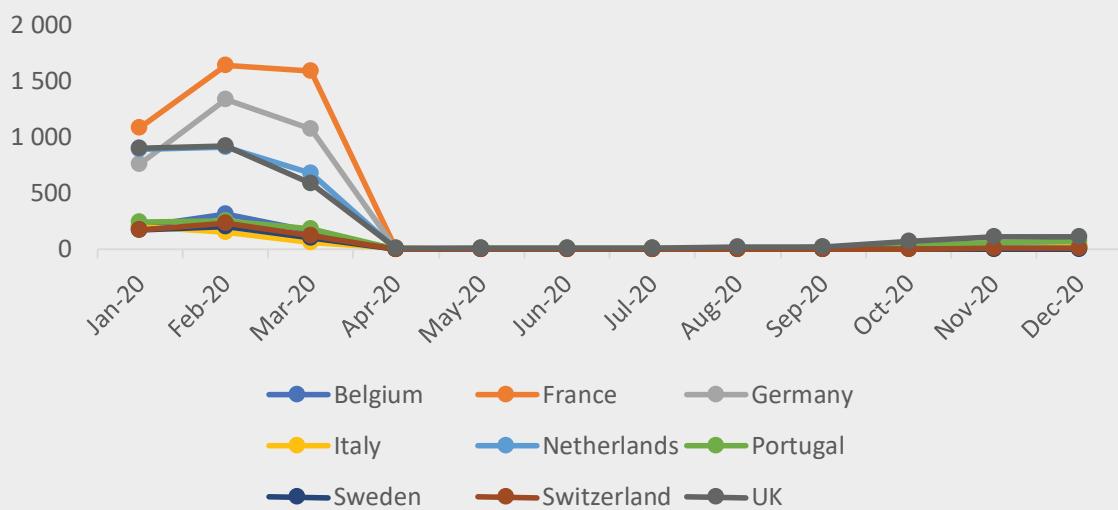
Top 8 SADC Markets, 2020



Australia and Americas Arrivals



European Arrivals, 2020



- School calendar and climatic conditions are important determinants of visitor arrivals in Eswatini. However, in 2020, a variation was observed in the FTAs traditional seasonality pattern and those travelling as families.
- For Eswatini, the December and July tend to constitute the peaks, while the troughs are noted in January and June. The number of visits to attraction sites was highest in December (15.6%) and lowest in April (0.1%) .
- The first quarter registered the highest number of arrivals for the top 15 source markets.
- Noticeably, the number of arrivals steadily picked up in September 2021 for Mozambique, RSA and Zambia, whilst the other African countries remained relatively low.
- Improvement in arrivals were seen in October 2021 for the rest of the key source markets in other regions.



09

STAY IN ESWATINI

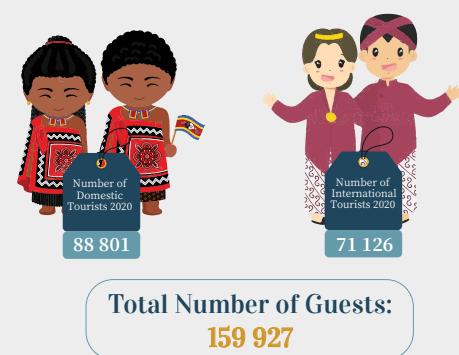
HIGHLIGHTS

Accommodation Performance
Average Length of Stay
Accommodation Spend
Nights Spend

Accommodation Performance

ACCOMMODATION INVENTORY

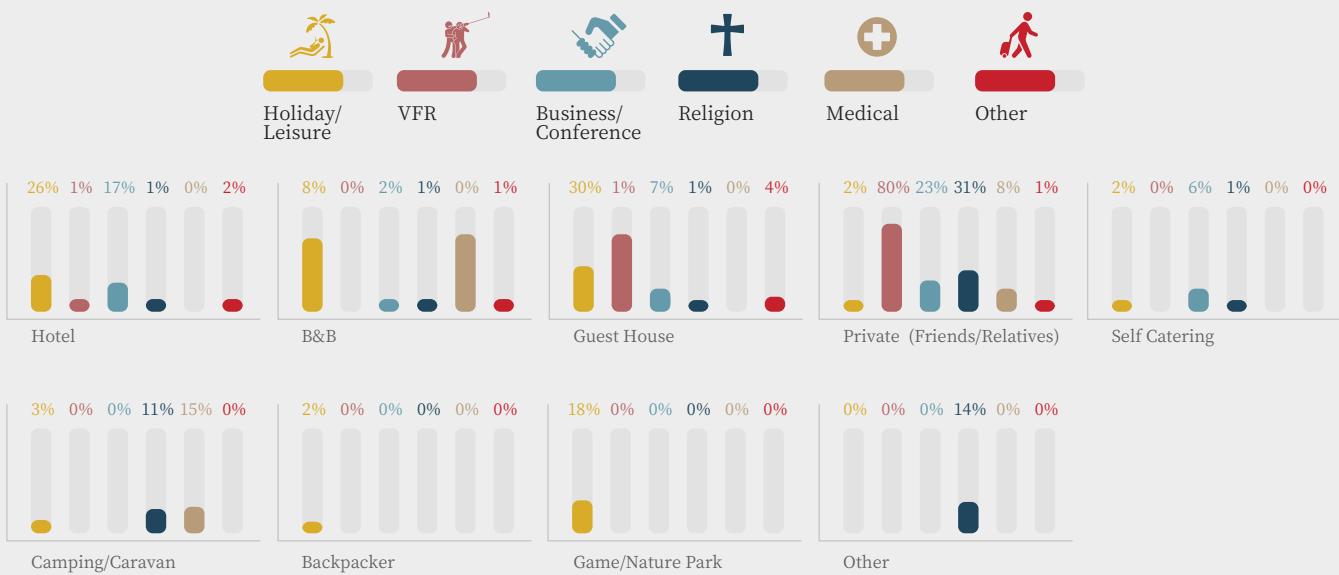
In 2020, the stock of accommodation establishments in Eswatini stood at 175, which is representative of an increase of 6.7% compared to 2019. While the number of establishments increased, total rooms available declined from 3,293 in 2019 to 3,038 in 2020 as the year saw one of the largest and oldest hotel brands in Eswatini close it's doors on account of the COVID-19 pandemic. The total number of beds available consequently declined by 6.9%. Bed and Breakfast (26.1%), Guest houses (25.0%) and hotels (15.9%) were the main types of accommodation facilities available during the year.



NUMBER OF GUESTS

The proportion of total international visitor arrivals using formal accommodation facilities declined from 31.4% in 2019 to 20.6% in 2020. Despite the challenging environment, a total of 88,801 overnight stays were attributable to Emaswati in 2020, reflecting a decline of 30.7% when compared to 2019. International overnight stays contracted by 70.9% during this period, from 244,373 guests in 2019 to 71,126 overnight guests in formal accommodation.

REASON FOR VISIT BY ACCOMMODATION



LENGTH OF STAY

While inbound visits recorded drastic declines, a year-on-year comparison shows an overall increase in the average length of stay by international visitors from 1.8 nights to 2.01 nights (including private overnight stays), suggesting that these travellers stayed for relatively longer periods. The formal accommodation sector also saw the average length of stay rise marginally from 1.09 to 1.37 nights. Accommodation facilities in Mbabane area recorded higher average stay (1.85 nights), while establishments located in Manzini registered an average stay of 1.57 nights. Overall room occupancy rate registered 23.8%, while occupancy of bed-places registered 17.7%. The room occupancy rate of accommodation establishments in Mbabane declined from 29% in 2019 to 14% in 2020, whilst room occupancy in Ezulwini facilities' recorded 36.1% occupancy, reflecting a decrease by 23.2%. The most nights (5,658) were spent by visitors from RSA, which accounted for a share of 51.2% of the total international visitor overnight stays. Mozambican nationals spent a total of 971 number of nights.

TOTAL BILL
203,312,892.61



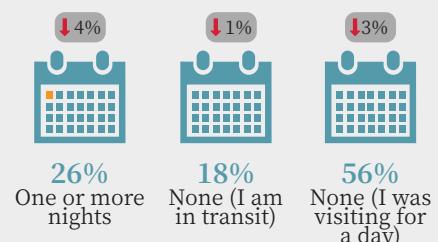
ACCOMMODATION BILL

During the year under review, the formal accommodation bill declined by 52.8 % to reach E203 million. Restaurants and accommodation were the leading revenue generators contributing E98.3 million and E92.7 million, respectively. The remainder sourced from entertainment (E12.2 million) and transport services (E64,306). The foregoing underscores the value of having a dining and entertainment facilities supporting the core function of accommodation. Consideration of the geospatial distribution of the accommodation bill revealed that Ezulwini contributed about the 40.7% of the total bill while Manzini and Mbabane contributed 13.9% and 3.3%, respectively. The relatively high concentration of accommodation establishments in the Ezulwini valley make the area primed to generate more revenue compared to other parts of the country.

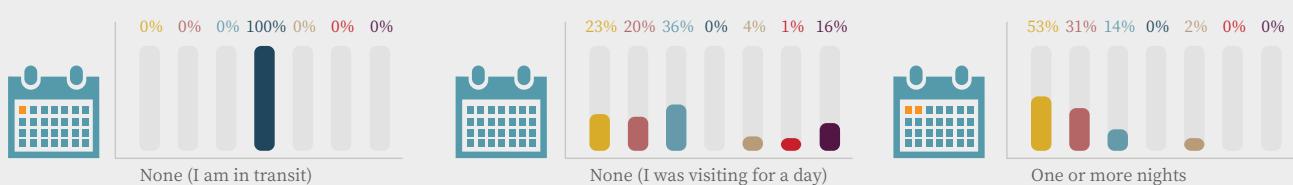
Nights spent in Eswatini

Generally, the majority of visitors to Eswatini (56%) visit the country for a day, with 36% of these being business travellers and approximately a fifth visiting for holiday purposes. Business travellers that spent at least one night accounted for a sizeable 14%, representing a marginal increase from last year. Worth noting is that the number of those visitors declined across all categories, with tourists spending one or more nights recording the highest decline of 4%. The number of day visitors dropped by 3% and the proportion of those in-transit declined from 19% in 2019 to 18% in 2020.

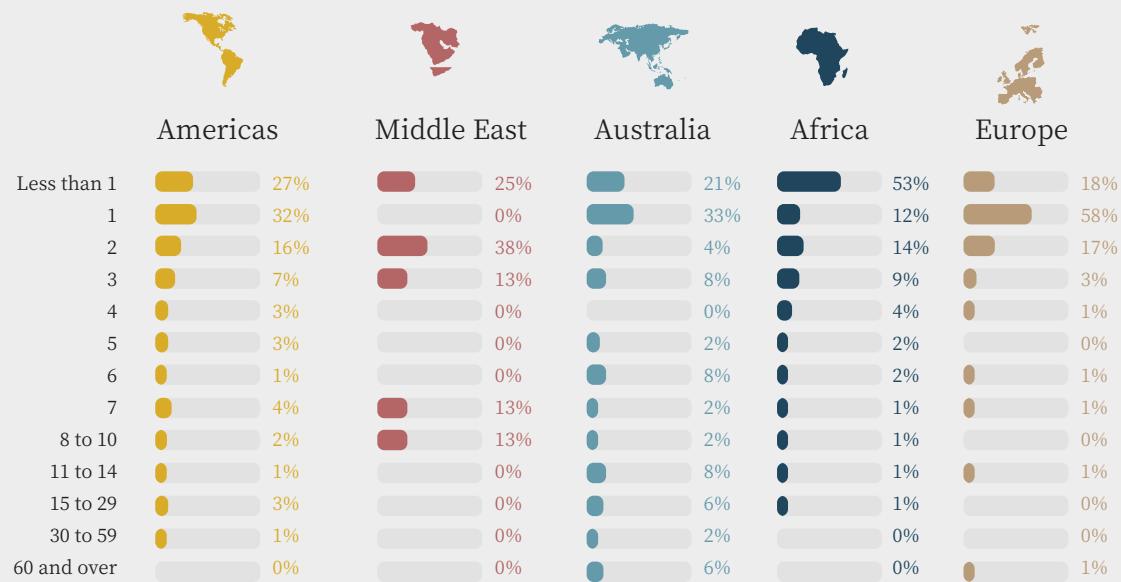
NIGHTS SPENT WHILE VISITING ESWATINI



NIGHTS SPENT BY REASON FOR VISIT



REGION BY NUMBER OF NIGHTS STAYED



10

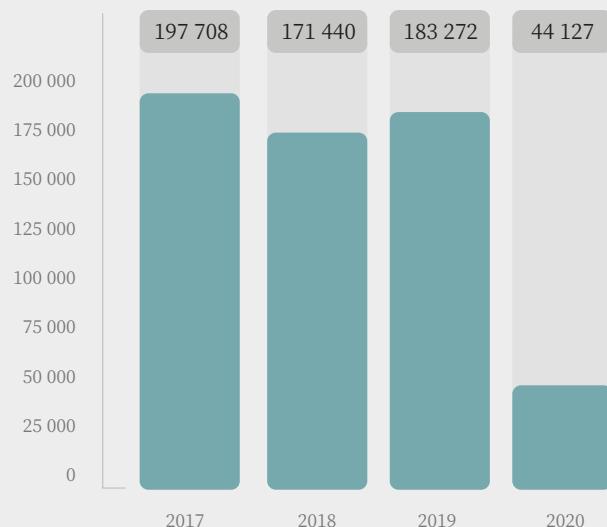
DAY VISITS IN ESWATINI

HIGHLIGHTS

Annual Visitors
Visitors by Country
Activities Engaged In
Visitor Spend



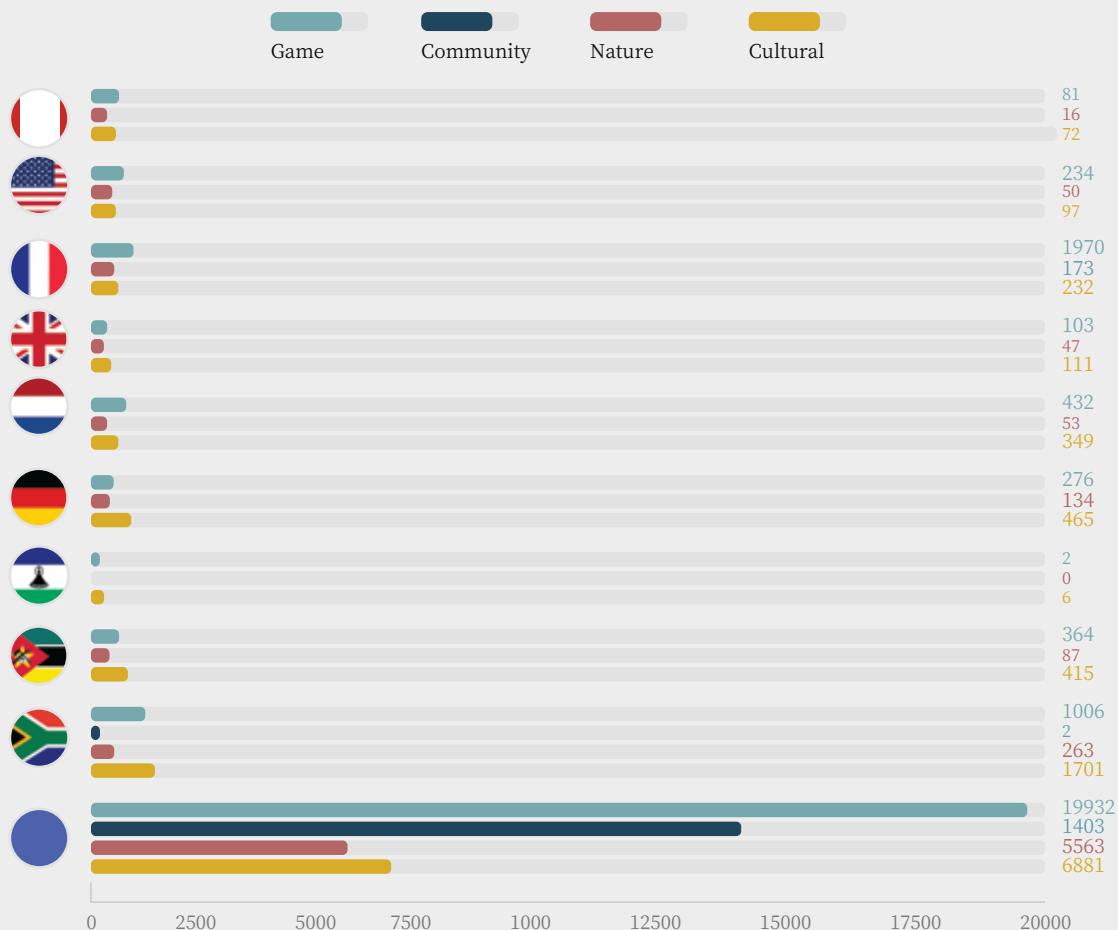
DAY VISITORS



The volume of day visits undertaken in 2020 declined by 73.1% compared to 2019, with a total of 44 127 visits registered from 125 763 visits in 2019. The highest number of visits were undertaken by the domestic market reflecting a decline of 67.1% recorded year-on-year, with the majority travelling an average distance of 30-50km from the usual place of residence. International visitors undertook a total of 10 348 visits to attraction sites equating to a decline of 82.0% in comparison to the previous year.

The domestic and regional markets represent a significant source for visitations to attraction sites. In 2020 more than 33 000 of Emaswati visited day visiting facilities, with 45% engaging in nature and cultural based activities. Regional visits shrunk by 77.1% with South Africa, Mozambique, Lesotho and Botswana accounting for the highest trips. While the overall number of overseas visitors to attraction sites shrunk by 73.1% – resultant from the decline in annual inbound visits – French nationals accounted for the highest 5.4% of total visits to day visiting facilities in 2020.

VISITORS BY COUNTRY



ACTIVITIES ENGAGED IN

The number of paid-for attraction sites remained at 12 in 2020, with these comprising of nature, wildlife, culture and heritage and community-based tourism activities. Game viewing (56.8%) and cultural/heritage sites (25.2%) accounted for the highest number of visits during this period with 1 out 4 travellers engaging in these activities. The trend in terms of visitor volumes varied across the year, with some months recording significantly higher visits. The summer months of December and November registered higher numbers of trips, while December saw a decline in trip volume compared to 2019. Domestic visits were highest in the months of December while international travelers peaked in December and November.



56,78%
Game Reserve



25,17%
Culture/Heritage

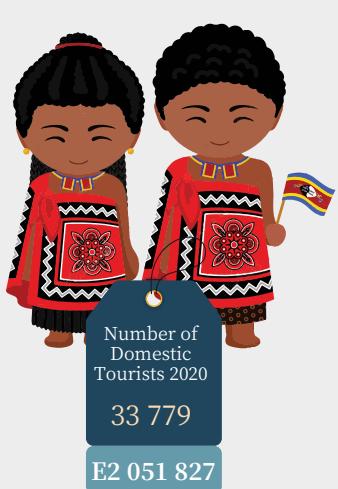


14,86%
Nature Reserve



3,18%
Community

DAY VISITORS SPEND



**Total Number Revenue:
E3 626 267**



11 PLACES VISITED & ACTIVITIES

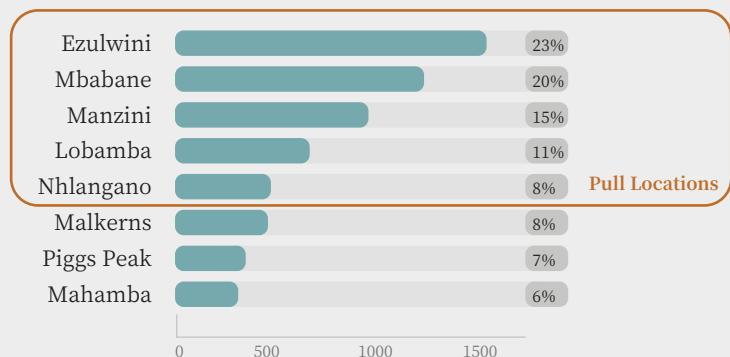
HIGHLIGHTS

Places Visited and Activities Engaged In

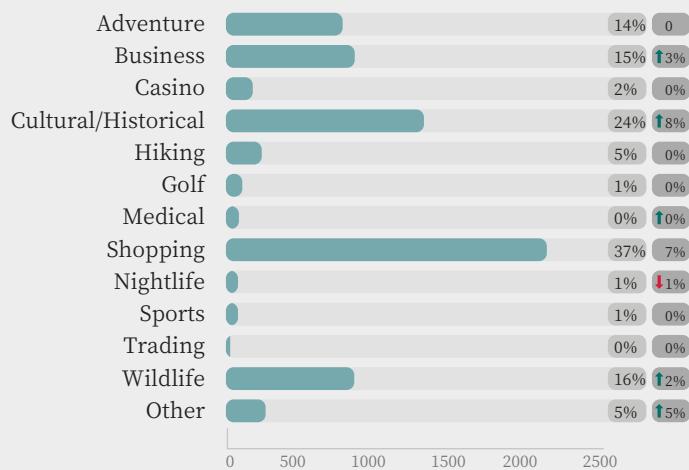
Places Visited and Activities Engaged In

Traditionally, travelers to Eswatini visit the urban centres and peripheries of Ezulwini, Mbabane, Malkerns and Manzini with 31.8% of all travelers having visited these locations for recreation and curio shopping. The areas of Lobamba and Simunye registered a 0.2% decline in international visitation, whilst Mbabane and Nhlangano only declined marginally comparative to 2019. Furthermore, the towns of Ngwenya (-0.7%), Manzini (-0.1%) and Ezulwini (-17.0%) all recorded decreases in international visitations.

PLACES VISITED



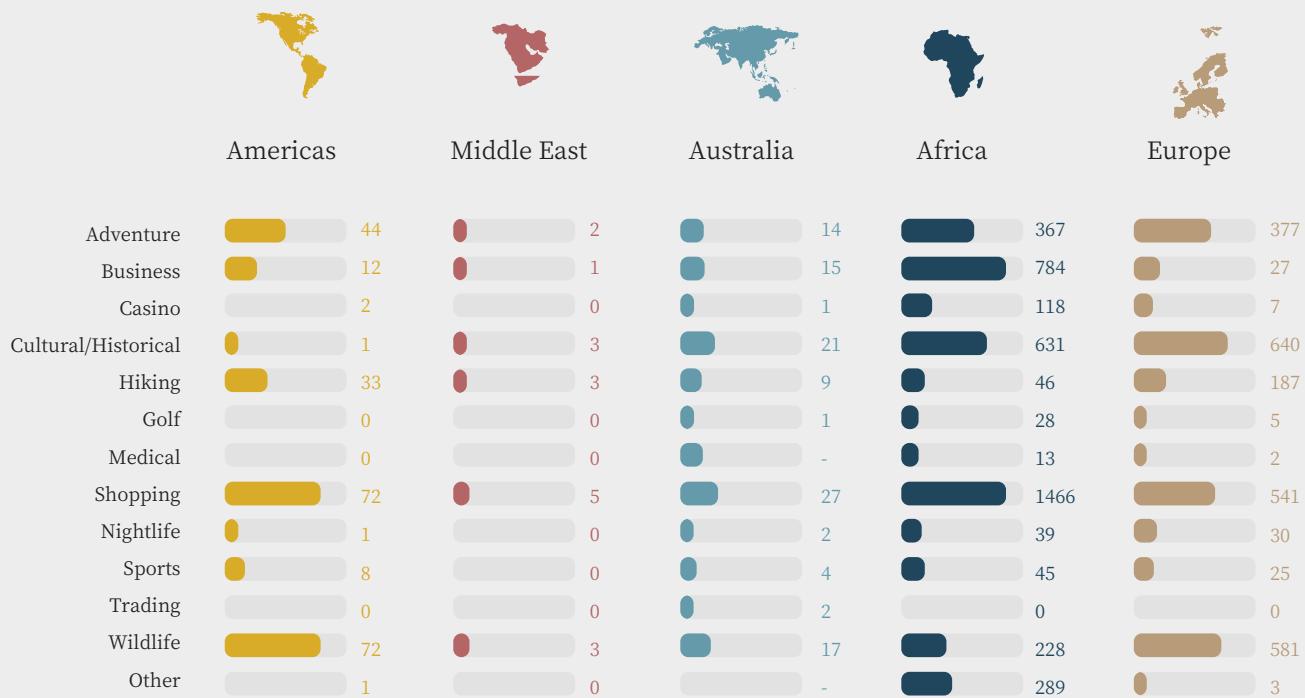
ACTIVITIES ENGAGED IN



Almost one in every three international visitors engaged in recreational shopping, with French and German nationals accounting for largest proportions. Another third of the visitors engaged in more explorative activities, which comprised of hiking (4.0%), adventure (11.6%), game viewing (13.1%), cultural and historical activities (19.6%).

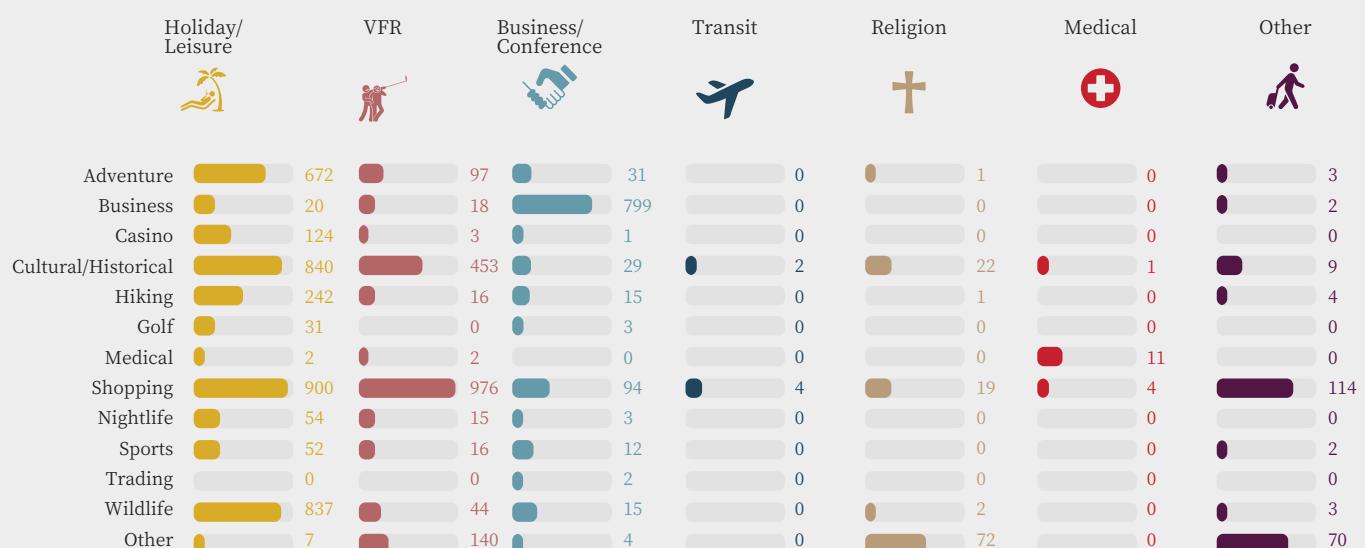
ACTIVITIES ENGAGED IN BY REGION

Ranking from “most interesting activity” to “least interesting activity” by region, for 2020, most visitors from Europe, were interested in wildlife (24.0%), adventure (14.4%), culture and heritage (26.4%) and shopping (22.3%), while comparatively, most visitors from the African region were interested in shopping (36.2%), business (19.3%), culture and heritage (15.6%) and other miscellaneous activities. Expectedly, African travelers accounted for the highest number of business travelers whilst such activity was minute from European visitors.



Visitors who came to Eswatini for recreational purposes tended to engage in a wider range of activities compared to those who travelled for any ‘other reason’. Most holiday travelers engaged in experiential activities such as viewing wildlife (22.1%), cultural/historical/heritage sites (22.2%) and adventure (17.8%), as well as shopping (23.8%). The majority of VFRs (54.8%) undertook shopping and participated in cultural/heritage activities (25.4%). The business/conference segment engaged in less activities outside the core of the visit with 9.3% undertaking curio shopping. This presents an opportunity for organized delegate recreational itineraries that will encourage regional spread of visitations, increased spend and enticement for repeat visits. Interestingly, in 2020, almost half of the visitors who were transiting through the country engaged in cultural/heritage activities – demonstrating a potential to convert these into night visitors. A considerable 18.8% of those visiting for religious purposes visited cultural/ historical sites as part of their stay.

ACTIVITIES ENGAGED IN BY REASON FOR VISIT



12

MODE OF TRANSPORT

HIGHLIGHTS

Mode of Transport

Reason of Visit by Mode of Transport

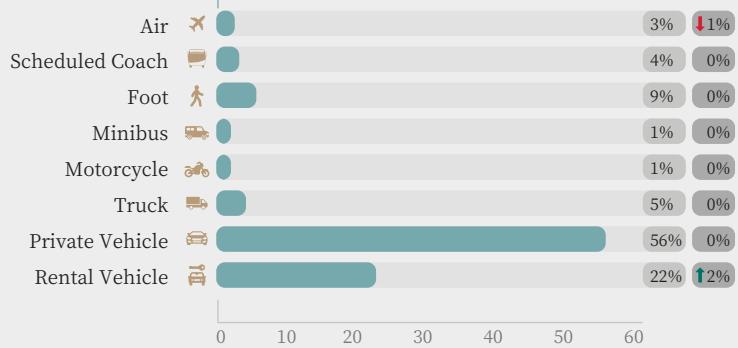


Mode of Transport

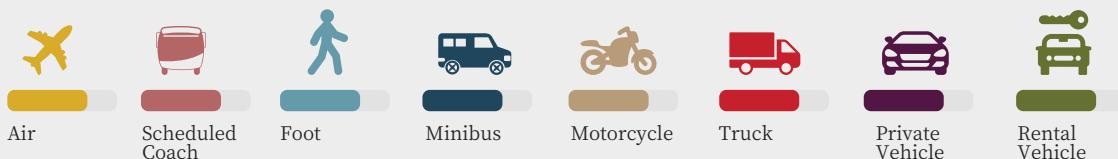
Travel by road remained the most preferred mode of transport to Eswatini, with a majority of these being regional residents. In 2020, out of the 345 000 international visitor arrivals, the majority 98.9% arrived by road, followed by air 1.1%. The corresponding figures for 2019 reveal a similar pattern with road accounting for 98.4% and 1.6% for air travel, respectively. From a regional perspective, the share of arrivals varied for regions and countries. The mode of transport for Southern Africa and Europe was predominantly through road. Countries with significant air traffic comprised of USA, UK and RSA.

MODE OF TRANSPORT

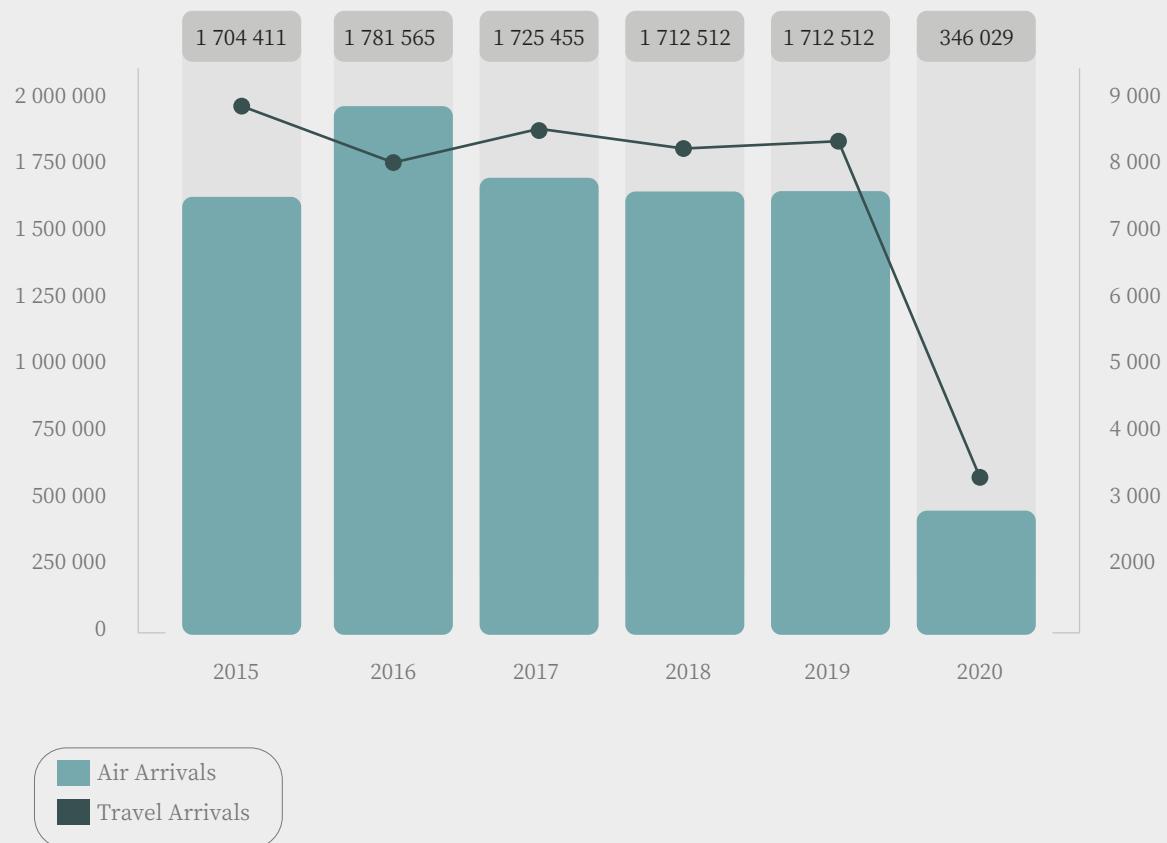
Performance vs 2019



REASON FOR VISIT BY MODE OF TRANSPORT



MODE OF TRANSPORT



13

RATING STAY IN ESWATINI

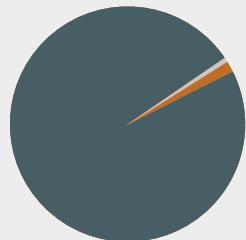
HIGHLIGHTS

Visitor Ratings
Perceptions
Experiences



Visitor Ratings

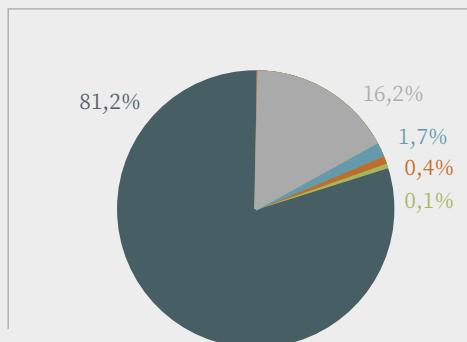
RECOMMENDED VISIT



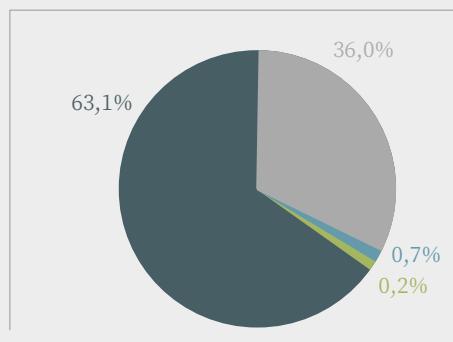
- Most visitors to Eswatini rated their general experience as either excellent or good, these including accommodation they used; safety and security; availability of information; border control services and customer service.
- 95.5% would recommend Eswatini for a holiday visit.
- Majority of visitors had positive perceptions of Eswatini prior to arrival.

VISITOR RATINGS

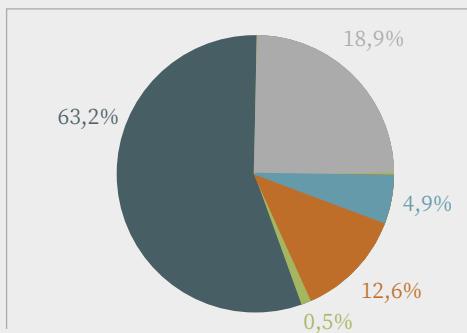
Customer Service



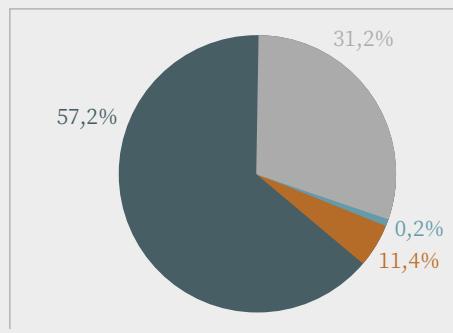
Border Control Services



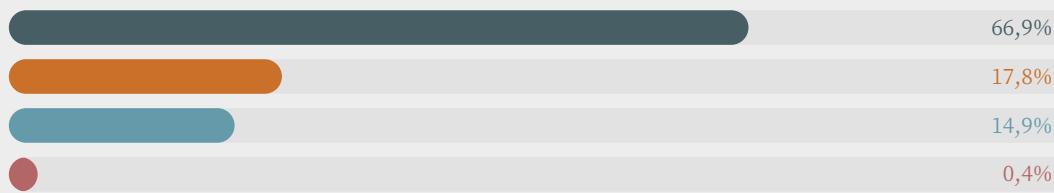
Availability of Information



Security & Safety

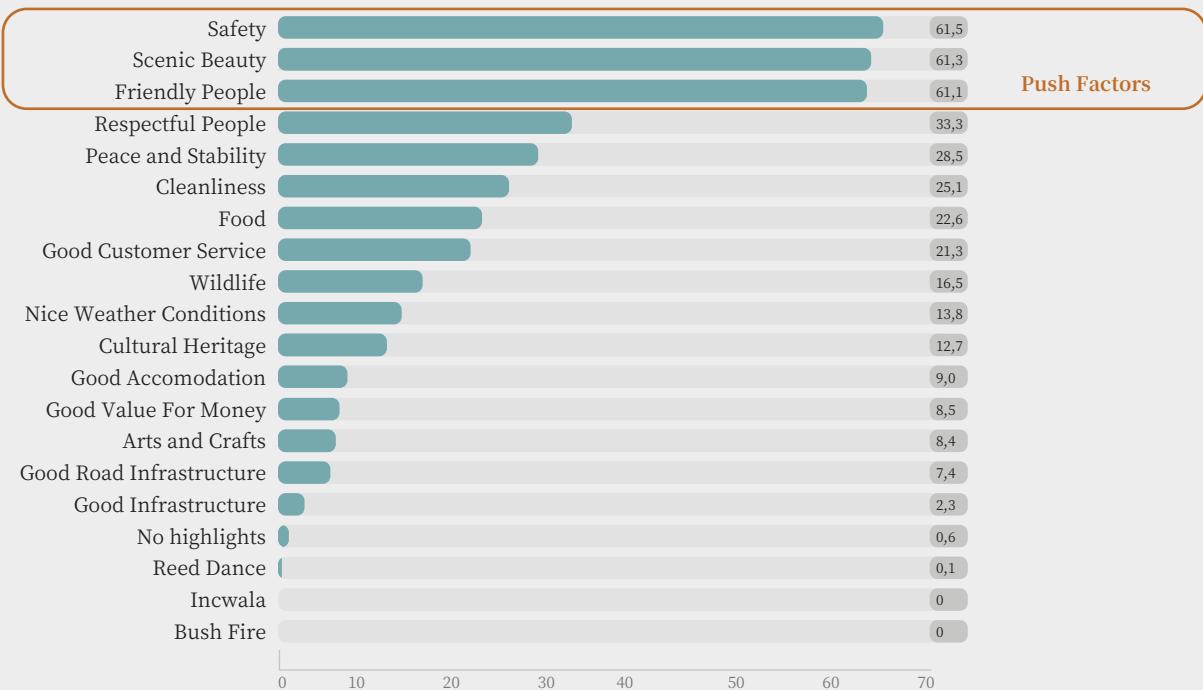


ACCOMMODATION BY PRICING

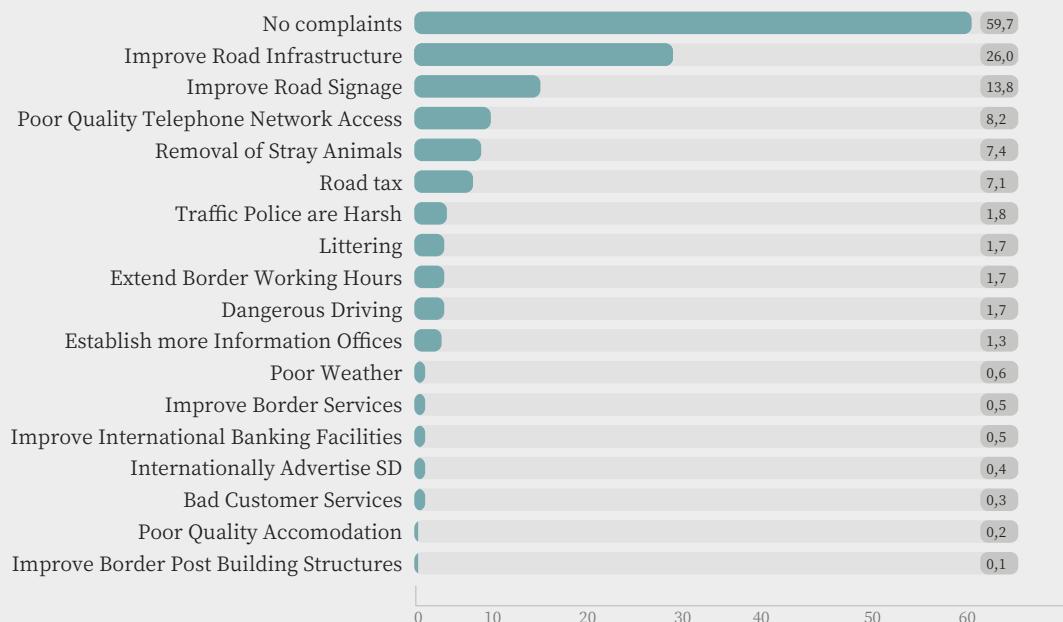


Visitor Experiences

VISITOR HIGHLIGHTS



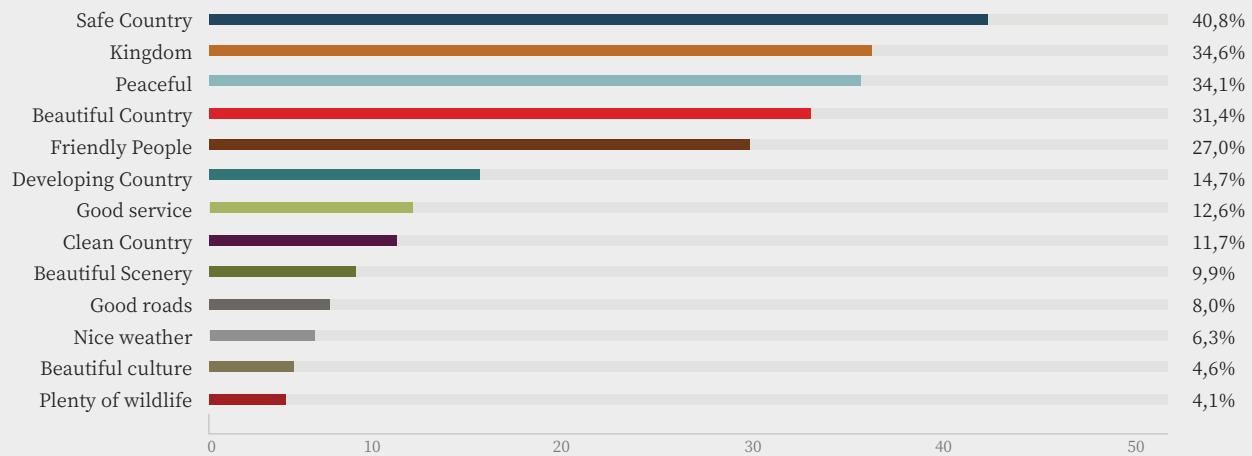
VISITOR COMPLAINTS



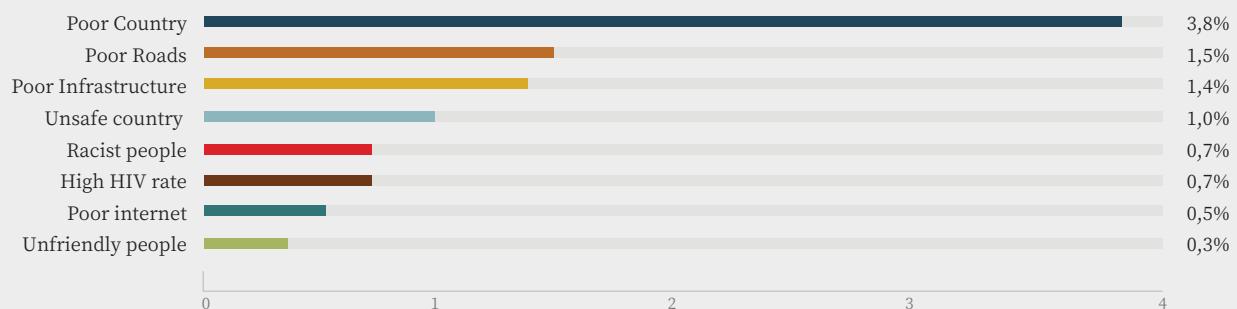
Perceptions About Eswatini

Visitor perceptions prior to visiting Eswatini were generally positive with the peaceful, scenic and friendly nature of the country being the foremost impression visitors had about the country. The proportion of visitors with the aforementioned sentiments were highest in 2020.

POSITIVE PERCEPTIONS ABOUT ESWATINI



NEGATIVE PERCEPTIONS ABOUT ESWATINI





14 OUTLOOK

HIGHLIGHTS

Tourism Outlook 2021

Tourism Outlook 2021

INTERNATIONAL DEVELOPMENTS

The emergence of COVID-19 variants, the continued imposition of travel restrictions and the availability of discretionary income to travel have continued to weigh down on the recovery of international travel. For this reason, a decline in growth is expected to continue for the tourism sector in 2021, but at a slower pace in 2022. UNWTO forecasts indicate that travel demand is expected to remain below its pre-pandemic trajectory for the next two to three years. Furthermore, tourism recovery at destination level is expected to be uneven and is likely to be primarily driven by developed economies due to a relatively swifter progression in the roll-out of COVID-19 vaccine programmes. The virus has been noted to have impacted global demographic categories differently, with the mature age groups reported to be the most affected. The connotation then is that of a change in the typical family structure, and by extension the propensity to undertake long-haul travel within the 50+ years age categories. The traditional overseas travel partnership and behavior may become fragmented, creating a need for operators in the tourism and hospitality to understand and adapt to a younger population including their preferences and behavior.

ON THE DOMESTIC FRONT

For Eswatini, 2020 began on an optimistic note as the country was named in the ‘Lonely Planet’ as Best in Travel 2020’ as 5th in the world’s top countries for travellers in 2020. Prospects to leverage on the strong positioning as a tourism destination were thwart by a complete industry shutdown at the onset of the COVID-19 global pandemic 3 months into the year. Since then, the hardship faced by industry has been devastating with businesses losing income and staff, and some closing their doors. While recovery has been very fragile, the tourism sector has undergone considerable adaptation and refocusing in the new environment. Priority has been placed on rebuilding market confidence through development of health and safety protocols and strengthening the positioning of Eswatini as an affordable and safe tourism destination.

PREPARING FOR DOMESTIC RECOVERY

The primary focus should be on recovery efforts that will ensure that when the time is right, Eswatini becomes a destination of choice for holiday travelers. Systematically, this means provision of support to tourism enterprises and ensuring a sustenance of the tourism industry in terms of jobs and the quality of product offering. As countries open up, the adoption to the new normal protocols and new technology will be vital to ensure the safety of travelers and stimulating travelers’ willingness to travel. Therefore, rebuilding trust in travel and restarting inbound tourism to Eswatini requires accelerating the pace of vaccination and advancing digital tools to facilitate mobility. Additionally, market re-entry will require a combination of significant investments in media and with travel professional partnerships, and targeted cooperative marketing campaigns and holiday offers. The Southern Africa inbound market is anticipated to recover quicker in terms of visitor numbers than long-haul markets. However, a number of factors will dictate the recovery variations within the regional markets. These factors comprise of the economic situation in each market particularly with regards to unemployment and possible fiscal tightening; and new behavioral habits affecting leisure and business travel, both in the short and long term. While there remains uncertainty when regional and international travel will fully resume, reliance should be on the domestic market to rebound the sector. In light of the short to medium term consequences of the pandemic, focus should be on strengthening domestic tourism. This entails exploring domestic niche markets, developing monthly calendar of events and packaging tours for the different market segments to encourage staycation even after international markets reopen.

15 ANNEX

HIGHLIGHTS

Arrivals 2020

Arrivals from Selected Markets

Main Purpose of Visit



ARRIVALS 2020

COUNTRY OF RESIDENCE	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	TOTAL
AFRICA	88 173	68 699	61 091	3 334	5 622	7 530	7 548	8 480	8 820	14 831	19 325	21 780	315 233
Botswana	351	300	247	45	48	50	71	73	62	73	55	76	1 451
Kenya	98	119	92	0	0	1	3	8	2	19	30	87	459
Lesotho	380	250	232	3	18	29	30	35	35	57	79	110	1 258
Malawi	478	443	436	6	13	7	18	8	16	46	67	136	1 674
Mozambique	10 166	10 646	10 700	791	1 367	1 784	1 568	1 778	1 868	2 582	3 828	4 194	51 273
Nigeria	224	193	170	1	1	4	4	3	3	18	54	63	739
RSA	71 902	52 125	45 186	2 202	3 672	5 098	5 345	6 060	6 287	10 962	13 900	15 585	238 324
Tanzania	451	463	561	0	4	8	3	5	4	34	60	86	1 679
Zambia	326	294	244	3	8	16	14	26	29	45	59	129	1 193
Zimbabwe	3 062	3 128	2 646	270	464	491	447	428	468	805	853	1 027	14 089
Other Africa	735	735	577	13	27	42	45	56	46	190	340	287	3 093
NORTH & SOUTH AMERICA	1 345	1 337	1 112	32	7	15	21	17	12	47	98	182	4 225
Brazil	73	40	42	0	0	0	0	0	0	0	6	3	11
Canada	244	383	298	0	0	1	1	1	1	9	19	31	988
USA	916	835	727	32	7	13	20	11	10	29	71	117	2 788
Other America	112	79	45	0	0	1	0	5	1	3	5	23	274
MIDDLE EAST	114	144	41	0	0	1	3	0	2	8	14	21	348
Kuwait	3	3	0	0	0	0	0	0	0	0	0	0	6
Iran	1	5	1	0	0	0	0	0	0	0	1	3	13
Israel	82	108	23	0	0	1	1	0	0	0	3	3	232
Saudi Arabia	0	3	0	0	0	0	0	0	0	0	0	0	3
UAE	0	1	0	0	0	0	0	2	0	0	0	0	5
Other Mid East	28	23	17	0	0	0	0	0	0	2	4	6	89
ASIA & AUSTRALIA	2 323	2 035	1 364	14	25	53	49	40	63	235	435	442	7 079
Australia	203	110	87	0	0	1	0	0	0	0	0	6	412
China	194	135	103	2	0	0	2	1	27	31	30	30	555
India	690	626	395	0	1	8	17	21	12	34	101	116	2 022
Pakistan	625	527	432	10	4	11	7	6	9	78	167	187	2 063
Philippines	26	54	22	0	0	1	1	0	0	8	11	10	133
South Korea	100	161	55	0	16	1	8	6	7	10	13	14	391
Taiwan	69	110	29	0	0	22	12	3	5	34	30	26	340
Other Asia	416	313	241	2	4	9	2	3	3	40	77	54	1 163
EUROPE	5 502	6 856	5 030	27	25	42	41	47	61	191	284	358	18 464
Belgium	200	315	167	2	0	1	1	2	4	11	6	12	721
France	1 079	1 643	1 590	2	0	0	2	3	4	8	10	30	4 371
Germany	761	1 333	1 077	0	4	5	7	5	20	22	26	26	3 261
Italy	206	151	60	6	1	1	1	0	0	8	5	27	466
Netherlands	890	906	676	1	0	4	4	8	7	13	10	10	2 526
Norway	19	77	16	0	0	0	1	0	0	0	0	0	113
Portugal	244	253	179	3	11	10	11	5	18	31	60	70	895
Sweden	169	207	101	0	0	2	0	0	0	0	3	4	486
Switzerland	174	231	117	0	0	0	0	0	1	6	14	14	543
UK	899	921	586	10	12	9	10	18	20	70	107	111	2 772
Other Europe	861	819	461	3	1	11	7	3	3	35	52	54	2 311
GRAND TOTAL	97 457	79 071	68 638	3 407	5 679	7 641	7 662	8 584	8 958	15 312	20 156	22 783	345 348

ARRIVALS FROM SELECTED MARKETS

AFRICA								
CHARACTERISTICS	Botswana		Kenya		Lesotho			
TOTAL ARRIVALS	NO.	%	%CHG	NO.	%	%CHG	NO.	%
	1 451	100,0%	-73,3%	459	100,0%	-72,7%	1 258	100,0%
MODE OF TRAVEL	1 451			459			1 258	
Air	145	10,0%	-94,2%	459	100,0%	-71,5%	0	0,0%
Land	1 306	90,0%	-55,3%	0	0,0%	-100,0%	1 258	100,0%
GENDER				459			1 258	
Male	1 451	100,0%	-55,2%	262	57,1%	-78,6%	0	0,0%
Female	0	0,0%	-100,0%	197	42,9%	-56,8%	1 258	100,0%
AGE GROUP	1 451			459			1 258	
18-24	0			0	0,0%		0	0,0%
25-34	145	10,0%	-84,5%	66	14,3%	87,5%	315	25,0%
35-44	218	15,0%	-90,5%	66	14,3%	-93,3%	944	75,0%
45-54	1 016	70,0%	-48,8%	328	71,4%	-48,1%	0	
55-64	73	5,0%	-65,3%	0		-100,0%	0	
65+	0			0			0	
LENGTH OF DAYS	1 451			459			1 258	
Under 1 day	73	5,0%	-86,1%	0	0,0%		629	50,0%
1 Day	145	10,0%	-30,6%	0	0,0%		0	0,0%
2 Days	508	35,0%	-69,6%	66	14,3%	-62,5%	315	25,0%
3 Days	508	35,0%	-55,8%	0	0,0%	-100,0%	315	25,0%
4 Days	0	0,0%	-100,0%	0	0,0%	-100,0%	0	
5 Days	145	10,0%	-65,3%	66	14,3%	-81,2%	0	
6 Days	0		-100,0%	66	14,3%	-62,5%	0	
7 Days	0		-100,0%	0	0,0%	-100,0%	0	
8- 10 Days	73	5,0%		66	14,3%	-6,2%	0	
11 - 14 Days	0		-100,0%	131	28,6%	-62,5%	0	
15 - 29 Days	0			66	14,3%	-37,5%	0	
30- 59 Days	0			0		-100,0%	0	
60 Days & Over	0		-100,0%	0		-100,0%	0	
Av. Length of Stay (Days)	2,85		-58,0%	8,7		-43,7%	1,25	
Visitor Nights	4 135		-87,6%	3 998		-84,6%	1 573	
								-92,6%

AFRICA								
CHARACTERISTICS	Malawi		Mozambique		Nigeria			
TOTAL ARRIVALS	NO.	%	%CHG	NO.	%	%CHG	NO.	%
	1 674	100,0%	-68,6%	51 273	100,0%	-65,0%	739	
MODE OF TRAVEL	1 674			51 273				-75,3%
Air	515	30,8%	-82,7%	176	0,3%	-17,2%	0	
Land	1 158	69,2%	-51,0%	51 097	99,7%	-65,1%	0	
GENDER	1 674			51 273			739	100,0%
Male	1 545	92,3%	-61,6%	29 892	58,3%	-70,0%	0	
Female	129	7,7%	-90,2%	21 381	41,7%	-54,3%	0	
AGE GROUP	1 674			51 273			739	100,0%
18-24	0	0,0%		1 128	2,2%	-26,0%	0	
25-34	516	30,8%	47,3%	12 357	24,1%	-57,8%	0	
35-44	757	45,2%	-78,9%	24 406	47,6%	-62,1%	0	
45-54	387	23,1%	-72,4%	12 152	23,7%	-73,0%	0	
55-64	0			974	1,9%	-82,3%	0	
65+	0			256	0,5%	-64,4%	0	
LENGTH OF DAYS	1 674			51 273			739	100,0%
Under 1 day	1 030	61,5%	-46,5%	38 455	75,0%	-63,9%	0	
1 Day	129	7,7%	-50,8%	5 691	11,1%	-68,8%	0	
2 Days	0		-100,0%	3 640	7,1%	-68,7%	0	
3 Days	129	7,7%	-78,9%	1 077	2,1%	-76,4%	0	
4 Days	0	0,0%	-100,0%	359	0,7%	-43,5%	0	
5 Days	0	0,0%	-100,0%	103	0,2%	-81,4%	0	
6 Days	129	7,7%	-81,6%	154	0,3%	-78,6%	0	
7 Days	0		-100,0%	103	0,2%	-59,6%	0	
8- 10 Days	0		-100,0%	410	0,8%	-39,4%	0	
11 - 14 Days	129	7,7%	-83,6%	67	0,1%	-90,7%	0	
15 - 29 Days	129	7,7%	-50,8%	667	1,3%	-65,0%	0	
30- 59 Days	0			103	0,2%	144,2%	0	
60 Days & Over	0			103	0,2%	144,2%	0	
Av. Length of Stay (Days)	3,1		-58,9%	1,11		-65,8%	0	-
Visitor Nights	5 156		-79,8%	56 913		-56,2%	0	

ARRIVALS FROM SELECTED MARKETS

AFRICA		RSA				Tanzania				Zambia			
CHARACTERISTICS		NO.	%	%CHG	NO.	%	%CHG	NO.	%	%CHG	NO.	%	%CHG
TOTAL ARRIVALS		238 324	100,0%	-72,2%	1 679	100,0%	-72,2%	1 193	100,0%	-73,1%			
MODE OF TRAVEL		238 324			1 679			1 193					
Air		3 312	1,4%	-80,7%	1 679	100,0%	-68,2%	994	83,3%	-73,7%			
Land		235 012	98,6%	-72,0%	0	0,0%	-100,0%	199	16,7%	-69,9%			
GENDER		238 324			1 679			1 193					
Male		159 200	66,8%	-71,3%	1 120	66,7%	-67,0%	796	66,7%	-67,6%			
Female		79 124	33,2%	-73,7%	559	33,3%	-78,8%	397	33,3%	-80,0%			
AGE GROUP		238 324			1 679			1 193					
18-24		3 575	1,5%	-80,7%	0	0,0%		0	0,0%				
25-34		48 380	20,3%	-74,4%	0	0,0%		0	0,0%	-100,0%			
35-44		83 413	35,0%	-73,0%	1 120	66,7%	-67,0%	597	50,0%	-74,7%			
45-54		70 544	29,6%	-69,9%	559	33,3%	-78,8%	397	33,3%	-69,9%			
55-64		27 646	11,6%	-69,6%	0			199	16,7%				
65+		5 005	2,1%	-66,6%	0			0	0,0%				
LENGTH OF DAYS		238 324			1 679			1 193					
Under 1 day		114 634	48,1%	-71,4%	0	0,0%		0	0,0%	-100,0%			
1 Day		29 791	12,5%	-70,8%	0	0,0%	-100,0%	0	0,0%	-100,0%			
2 Days		37 894	15,9%	-79,8%	0	0,0%	-100,0%	199	16,7%	5,4%			
3 Days		24 786	10,4%	-76,6%	559	33,3%	-25,9%	0	0,0%	-100,0%			
4 Days		10 725	4,5%	-66,9%	0	0,0%	-100,0%	199	16,7%	-64,8%			
5 Days		4 766	2,0%	-50,4%	0	0,0%	-100,0%	0	0,0%	-100,0%			
6 Days		4 528	1,9%	-11,9%	0	0,0%	-100,0%	199	16,7%	-64,8%			
7 Days		2 860	1,2%	-28,5%	559	33,3%	48,3%	0	0,0%	-100,0%			
8-10 Days		2 860	1,2%	-11,3%	0	0,0%	-100,0%	0	0,0%	-100,0%			
11-14 Days		2 860	1,2%	14,0%	559	33,3%	-25,9%	199	16,7%	5,4%			
15-29 Days		2 145	0,9%	71,0%	0		-100,0%	387	32,4%	104,5%			
30-59 Days		238	0,1%	-43,0%	0		-100,0%	0		-100,0%			
60 Days & Over		0			0			0		-100,0%			
Av. Length of Stay (Days)		1,79		-28,1%	7,67		-15,3%	12,0		-31,2%			
Visitor Nights		426 600		-62,3%	12 878		-76,5%	14 316		-79,8%			

AFRICA		AMERICA			
CHARACTERISTICS		Zimbabwe	Brazil	Canada	
TOTAL ARRIVALS		14 089 100,0%	175 100,0%	988 100,0%	-74,1%
MODE OF TRAVEL		14 089	175	988	
Air		3 416 24,2%	6 3,7%	174 17,6%	-78,6%
Land		10 673 75,8%	169 96,3%	804 81,4%	-73,2%
GENDER		14 089	175	988	
Male		6 410 45,5%	110 63,0%	377 38,2%	-58,1%
Female		7 679 54,5%	65 37,0%	611 61,8%	-79,1%
AGE GROUP		14 089	175	988	
18-24		423 3,0%	0 0,0%	0	-100,0%
25-34		5 128 36,4%	97 55,6%	145 14,7%	-81,2%
35-44		6 410 45,5%	71 40,7%	290 29,4%	-62,4%
45-54		2 142 15,2%	6 3,7%	262 26,5%	-69,5%
55-64		0	-100,0%	232 23,5%	-71,5%
65+		0	0	58 5,9%	-89,5%
LENGTH OF DAYS		14 089	175	988	
Under 1 day		8 538 60,6%	104 59,3%	-53,9%	-100,0%
1 Day		423 3,0%	52 29,6%	523 52,9%	-73,5%
2 Days		859 6,1%	19 11,1%	204 20,6%	-73,6%
3 Days		1 705 12,1%	0 0,0%	-100,0%	-65,9%
4 Days		859 6,1%	0 0,0%	0 0,0%	-100,0%
5 Days		0 0,0%	0 0,0%	0 0,0%	-100,0%
6 Days		423 3,0%	0	29 2,9%	
7 Days		0 0,0%	0	58 5,9%	-32,2%
8-10 Days		423 3,0%	0	-100,0%	57 5,8%
11-14 Days		845 6,0%	0	0 0,0%	-100,0%
15-29 Days		0	-100,0%	29 2,9%	-33,4%
30-59 Days		0	-100,0%	29 2,9%	-33,4%
60 Days & Over		0	0	0	-100,0%
Av. Length of Stay (Days)		1,97	-50,4%	0,52	-65,1%
Visitor Nights		27 755	-69,1%	91	-90,1%
				3 833	-78,3%

ARRIVALS FROM SELECTED MARKETS

CHARACTERISTICS	AMERICA				MIDDLE EAST				UAE			
	USA		Israel		UAE							
TOTAL ARRIVALS	2 788	100,0%	-81,5%	232	100,0%	-77,5%	5	100,0%	-50,0%			
MODE OF TRAVEL	2 788			232			5					
Air	667	23,9%	-83,7%	0	0,0%	-100,0%	5	100,0%	-50,0%			
Land	2 121	76,1%	-80,7%	232	100,0%	-73,8%	0	0,0%				
GENDER	2 788			232			5					
Male	1 363	48,9%	-75,6%	232	100,0%	-55,0%	3	50,0%	-64,3%			
Female	1 425	51,1%	-85,0%	0	0,0%	-100,0%	3	50,0%	-16,7%			
AGE GROUP	2 788			232			5					
18-24	120	4,3%	-64,4%	0	0,0%	-100,0%	0	0,0%				
25-34	758	27,2%	-85,2%	116	50,0%	-73,0%	0	0,0%				
35-44	940	33,7%	-75,9%	116	50,0%	-73,0%	0	0,0%	-100,0%			
45-54	666	23,9%	-81,5%	0		-100,0%	5	100,0%	66,7%			
55-64	181	6,5%	-83,9%	0		-100,0%	0					
65+	120	4,3%	-87,7%	0			0					
LENGTH OF DAYS	2 788			232			5					
Under 1 day	546	19,6%	-49,7%	116	50,0%	-66,2%	0	0,0%	-100,0%			
1 Day	697	25,0%	-81,9%	0	0,0%		0	0,0%				
2 Days	516	18,5%	-83,0%	116	50,0%		0	0,0%				
3 Days	273	9,8%	-81,3%	0			3	50,0%				
4 Days	181	6,5%	-84,4%	0			0	0,0%				
5 Days	120	4,3%	-89,7%	0		-100,0%	0	0,0%	-100,0%			
6 Days	31	1,1%	-95,2%	0			0	0,0%				
7 Days	151	5,4%	-73,2%	0			3	50,0%				
8- 10 Days	31	1,1%	-95,7%	0			0					
11 -14 Days	31	1,1%	-95,4%	0			0					
15 - 29 Days	123	4,4%	-45,5%	0			0					
30- 59 Days	31	1,1%	-79,6%	0			0					
60 Days & Over	61	2,2%	-81,8%	0			0					
Av. Length of Stay (Days)	6,26		-25,8%	1		-59,7%	5,0		0,0%			
Visitor Nights	17 453		-85,2%	232		-90,1%	25		-26,5%			

CHARACTERISTICS	ASIA & AUSTRALIA					
	Australia		China		India	
TOTAL ARRIVALS	NO. 412	% 100,0%	%CHG -83,5%	NO. 555	% 100,0%	%CHG -75,4%
MODE OF TRAVEL	412			555		
Air	32	7,7%	-89,0%	0	0,0%	-100,0%
Land	380	92,3%	-82,8%	555	100,0%	-41,1%
GENDER	412			555		
Male	193	46,8%	-73,8%	0	0,0%	-100,0%
Female	222	53,8%	-87,4%	555	100,0%	-41,1%
AGE GROUP	412			555		
18-24	16	3,8%	-90,2%	0	0,0%	
25-34	111	26,9%	-84,3%	0	0,0%	-100,0%
35-44	159	38,5%	-78,5%	555	100,0%	-41,1%
45-54	47	11,5%	-85,2%	0		-100,0%
55-64	32	7,7%	-91,8%	0		-100,0%
65+	47	11,5%	-75,3%	0		
LENGTH OF DAYS	412			555		
Under 1 day	111	26,9%	-50,5%	0	0,0%	
1 Day	222	53,8%	-78,4%	0	0,0%	
2 Days	32	7,7%	-95,5%	0	0,0%	-100,0%
3 Days	16	3,8%	-87,8%	555	100,0%	195,2%
4 Days	0	0,0%	-100,0%	0		-100,0%
5 Days	0	0,0%	-100,0%	0		-100,0%
6 Days	16	3,8%		0		506 25,0%
7 Days	0		-100,0%	0		253 12,5%
8- 10 Days	0		-100,0%	0		253 12,5%
11 -14 Days	16	3,8%	-51,1%	0		-100,0%
15 - 29 Days	0		-100,0%	0		506 25,0%
30- 59 Days	0		-100,0%	0		0
60 Days & Over	0			0		-100,0%
Av. Length of Stay (Days)	1,58		-56,2%	3		-1,0
Visitor Nights	651		-92,1%	1 665		-98,8%
					60 660	
						-53,78%

ARRIVALS FROM SELECTED MARKETS

ASIA & AUSTRALIA									
CHARACTERISTICS	Pakistan			Phillipines			South Korea		
TOTAL ARRIVALS	NO. 2 063	% 100,0%	%CHG -65,0%	NO. 133	% 100,0%	%CHG -72,6%	NO. 391	% 100,0%	%CHG -79,7%
MODE OF TRAVEL	2 063			133			391		
Air	2 063	100,0%	-56,2%	0	0,0%	-100,0%	0		
Land	0	0,0%	-100,0%	0	0,0%	-100,0%	0		
GENDER	2 063			133			391		
Male	2 063	100,0%	-61,1%	0	0,0%	-100,0%	0		
Female	0	0,0%	-100,0%	0	0,0%		0		
AGE GROUP	2 063			133			391		
18-24	0	0,0%		0			0		
25-34	0	0,0%	-100,0%	0		-100,0%	0		
35-44	2 063	100,0%	-50,0%	0		-100,0%	0		
45-54	0		-100,0%	0		-100,0%	0		
55-64	0			0			0		
65+	0			0			0		
LENGTH OF DAYS	2 063			133			391		
Under 1 day	0		-100,0%	0			0		
1 Day	0		-100,0%	0			0		
2 Days	0			0			0		
3 Days	0			0		-100,0%	0		
4 Days	0			0			0		
5 Days	0			0			0		
6 Days	0			0			0		
7 Days	0		-100,0%	0		-100,0%	0		
8- 10 Days	0			0			0		
11- 14 Days	0		-100,0%	0			0		
15 - 29 Days	0			0			0		
30- 59 Days	1 032	50,0%	-12,4%	0		-100,0%	0		
60 Days & Over	1 032	50,0%	-56,2%	0		-100,0%	0		
Av. Length of Stay (Days)	98,0		0,1			-1,0			
Visitor Nights	202 174		-56,51%			-100,00%			

ASIA & AUSTRALIA / EUROPE									
CHARACTERISTICS	Taiwan			Belgium			France		
TOTAL ARRIVALS	NO. 340	% 100,0%	%CHG -79,9%	NO. 721	% 100,0%	%CHG -87,2%	NO. 4 371	% 100,0%	%CHG -79,3%
MODE OF TRAVEL	340			721			4 371		
Air	340	100,0%	-79,3%	9	1,3%	-85,2%	0	0,0%	-100,0%
Land	0	0,0%	-100,0%	712	98,7%	-87,3%	4 371	100,0%	-79,1%
GENDER	340			721			4 371		
Male	340	100,0%	-65,8%	322	44,7%	-77,7%	1 368	31,3%	-80,7%
Female	0	0,0%	-100,0%	399	55,3%	-90,5%	3 003	68,7%	-78,6%
AGE GROUP	340			721			4 371		
18-24	170	50,0%	295,3%	0	0,0%	-100,0%	61	1,4%	-89,7%
25-34	0		-100,0%	247	34,2%	-90,2%	1 032	23,6%	-84,5%
35-44	170	50,0%	-78,2%	313	43,4%	-75,3%	1 587	36,3%	-72,8%
45-54	0		-100,0%	48	6,6%	-93,9%	525	12,0%	-85,9%
55-64	0		-100,0%	66	9,2%	-87,4%	800	18,3%	-72,9%
65+	0			48	6,6%	-76,8%	372	8,5%	-72,0%
LENGTH OF DAYS	340			721			4 371		
Under 1 day	0	0,0%		133	18,4%	-81,2%	691	15,8%	-68,4%
1 Day	0	0,0%		399	55,3%	-87,2%	2 863	65,5%	-78,2%
2 Days	0	0,0%	-100,0%	142	19,7%	-90,4%	647	14,8%	-87,1%
3 Days	0	0,0%	-100,0%	38	5,3%	-84,3%	92	2,1%	-83,6%
4 Days	0	0,0%	-100,0%	0		-100,0%	61	1,4%	-29,7%
5 Days	0	0,0%	-100,0%	0		-100,0%	17	0,4%	2,8%
6 Days	170	50,0%	-21,3%	0		-100,0%	0		-100,0%
7 Days	0		-100,0%	0			0		-100,0%
8- 10 Days	0		-100,0%	0			0		-100,0%
11- 14 Days	0		-100,0%	0		-100,0%	0		-100,0%
15 - 29 Days	0		-100,0%	0		-100,0%	0		-100,0%
30- 59 Days	0		-100,0%	0			0		-100,0%
60 Days & Over	170	50,0%	-43,9%	9	1,3%		0		
Av. Length of Stay (Days)	83		0,9	2,13		0,4	1,09		-0,2
Visitor Nights	28 220		-62,48%	1 536		-79,56%	4 764		-82,26%

ARRIVALS FROM SELECTED MARKETS

Europe								
Characteristics		Germany		Italy		Netherlands		
TOTAL ARRIVALS	NO.	%	%CHG	NO.	%	%CHG	NO.	%
TOTAL ARRIVALS	3 261	100,0%	-80,1%	466	100,0%	-84,3%	2 526	100,0%
MODE OF TRAVEL	3 261			466			2 526	
Air	16	0,5%	-77,1%	0	0,0%	-100,0%	10	0,4%
Land	3 245	99,5%	-80,1%	466	100,0%	-83,7%	2 516	99,6%
GENDER	3 261			466			2 526	
Male	1 109	34,0%	-79,3%	233	50,0%	-79,0%	912	36,1%
Female	2 152	66,0%	-80,5%	233	50,0%	-87,5%	1 614	63,9%
AGE GROUP	3 261			466			2 526	
18-24	39	1,2%	-92,5%	0	0,0%	-100,0%	51	2,0%
25-34	711	21,8%	-87,7%	125	26,9%	-89,4%	619	24,5%
35-44	1 242	38,1%	-73,2%	269	57,7%	-70,8%	892	35,3%
45-54	737	22,6%	-73,7%	72	15,4%	-87,8%	578	22,9%
55-64	382	11,7%	-80,0%	0		-100,0%	232	9,2%
65+	150	4,6%	-80,0%	0			152	6,0%
LENGTH OF DAYS	3 261			466			2 526	
Under 1 day	600	18,4%	-75,0%	89	19,2%	-73,0%	326	12,9%
1 Day	2 129	65,3%	-77,3%	233	50,0%	-85,5%	1 551	61,4%
2 Days	411	12,6%	-89,0%	108	23,1%	-87,0%	508	20,1%
3 Days	49	1,5%	-91,9%	18	3,8%	-62,3%	121	4,8%
4 Days	33	1,0%	-69,8%	0	0,0%	-100,0%	10	0,4%
5 Days	7	0,2%	-88,9%	0	0,0%		10	0,4%
6 Days	0	0,0%	-100,0%	18	3,8%		0	-100,0%
7 Days	7	0,2%	-34,8%	0	0,0%		0	-100,0%
8- 10 Days	7	0,2%	-83,3%	0		-100,0%	0	-100,0%
11-14 Days	0		-100,0%	0		-100,0%	0	-100,0%
15 - 29 Days	7	0,2%	-67,4%	0			0	
30- 59 Days	0			0			0	
60 Days & Over	7	0,2%		0			0	
Av. Length of Stay (Days)	1,5		0,0	1,3		-0,2	1,2	-0,2
Visitor Nights	4 761		-77,1%	610		-86,6%	3 031	

Europe								
Characteristics		Norway		Portugal		Sweden		
TOTAL ARRIVALS	NO.	%	%CHG	NO.	%	%CHG	NO.	%
TOTAL ARRIVALS	113	100,0%	-77,3%	895	100,0%	-71,5%	486	100,0%
MODE OF TRAVEL	113			895			486	
Air	23	20,0%	-83,6%	0	0,0%	-100,0%	49	10,0%
Land	90	80,0%	-74,9%	895	100,0%	-71,0%	437	90,0%
GENDER	113			895			486	
Male	23	20,0%	-92,6%	623	69,6%	-58,1%	170	35,0%
Female	90	80,0%	-53,4%	272	30,4%	-83,6%	316	65,0%
AGE GROUP	113			895			486	
18-24	0	0,0%	-100,0%	38	4,3%		0	0,0%
25-34	45	40,0%	-17,8%	156	17,4%	-86,4%	73	15,0%
35-44	0	0,0%	-100,0%	428	47,8%	-70,0%	97	20,0%
45-54	0	0,0%	-100,0%	194	21,7%	-51,4%	146	30,0%
55-64	45	40,0%	61,4%	78	8,7%		73	15,0%
65+	23	20,0%	-19,3%	0		-100,0%	97	20,0%
LENGTH OF DAYS	113			895			486	
Under 1 day	23	20,0%		701	78,3%	-5,7%	73	15,0%
1 Day	45	40,0%	-79,5%	116	13,0%	-91,1%	243	50,0%
2 Days	23	20,0%	-83,6%	78	8,7%	-89,5%	73	15,0%
3 Days	0		-100,0%	0		-100,0%	24	5,0%
4 Days	0			0		-100,0%	0	0,0%
5 Days	0			0			0	0,0%
6 Days	0			0		-100,0%	0	0,0%
7 Days	0			0			24	5,0%
8- 10 Days	0		-100,0%	0			24	5,0%
11-14 Days	23	20,0%	-58,9%	0			24	5,0%
15 - 29 Days	0			0		-100,0%	0	-100,0%
30- 59 Days	0			0		-100,0%	0	
60 Days & Over	0			0			0	
Av. Length of Stay (Days)	3,0		-0,1	0,3		-0,9	2,5	-0,1
Visitor Nights	339		-79,2%	269		-96,4%	1 191	

ARRIVALS FROM SELECTED MARKETS

EUROPE						
CHARACTERISTICS	Switzerland			UK		
	NO.	%	%CHG	NO.	%	%CHG
TOTAL ARRIVALS	543	100,0%	-80,1%	2 772	100,0%	-75,4%
MODE OF TRAVEL	543			2 772		
Air	31	5,8%	-51,8%	347	12,5%	-85,5%
Land	512	94,2%	-80,8%	2 426	87,5%	-72,7%
GENDER	543			2 772		
Male	209	38,5%	-76,9%	970	35,0%	-80,0%
Female	334	61,5%	-81,8%	1 802	65,0%	-72,0%
AGE GROUP	543			2 772		
18-24	21	3,8%	-72,9%	0	0,0%	-100,0%
25-34	125	23,1%	-84,4%	244	8,8%	-87,8%
35-44	209	38,5%	-76,3%	310	11,2%	-86,2%
45-54	84	15,4%	-84,3%	485	17,5%	-78,4%
55-64	62	11,5%	-79,5%	485	17,5%	-73,0%
65+	42	7,7%	-68,1%	1 247	45,0%	-52,9%
LENGTH OF DAYS	543			2 772		
Under 1 day	31	5,8%	-89,3%	416	15,0%	-74,0%
1 Day	282	51,9%	-80,6%	1 247	45,0%	-63,8%
2 Days	198	36,5%	-74,4%	485	17,5%	-76,3%
3 Days	10	1,9%	-89,5%	105	3,8%	-90,0%
4 Days	0	0,0%	-100,0%	105	3,8%	-82,4%
5 Days	0	0,0%	-100,0%	0	0,0%	-100,0%
6 Days	0	0,0%	-100,0%	139	5,0%	-65,3%
7 Days	10	1,9%	-6,2%	36	1,3%	-91,0%
8- 10 Days	0			36	1,3%	-88,0%
11-14 Days	0		-100,0%	141	5,1%	-64,6%
15 - 29 Days	10	1,9%	-6,2%	36	1,3%	-92,8%
30- 59 Days	0			0		-100,0%
60 Days & Over	0		-100,0%	36	1,3%	-64,0%
Av. Length of Stay (Days)	1,8		-0,2	4,85		-0,1
Visitor Nights	972		-81,8%	13 153		-74,8%

MAIN PURPOSE OF VISIT

AFRICA											
Accommodation	Botswana	Kenya	Lesotho	Malawi	Mozambique	Nigeria	RSA	Tanzania	Zambia	Zimbabwe	
Hotel	60	0	25	8	20	0	16	0	17	12	
VFR	10	14	25	0	7	0	35	0	33	18	
Business	25	71	0	23	10	0	20	67	33	18	
Transit	5	0	25	46	61	0	21	0	0	12	
Other	0	14	25	23	3	0	7	0	17	39	

AMERICA						MIDDLE EAST					
Accommodation	Brazil	Canada	USA	Israel	UAE	Accommodation	Bahrain	Emirates	Jordan	Kuwait	Saudi Arabia
Hotel	52	85	55	50	100	Hotel	10	10	10	10	10
VFR	0	12	7	0	0	VFR	10	10	10	10	10
Business	0	3	16	0	0	Business	10	10	10	10	10
Transit	48	0	20	50	0	Transit	10	10	10	10	10
Other	0	0	2	0	0	Other	10	10	10	10	10

ASIA & AUSTRALIA									
Accommodation	Australia	China	India	Pakistan	Phillipines	South Korea	Taiwan	Thailand	Vietnam
Hotel	73	0	0	0	0	0	0	0	0
VFR	0	100	0	0	0	0	0	0	0
Business	4	0	100	100	0	0	0	50	0
Transit	23	0	0	0	0	0	0	0	0
Other	0	0	0	0	0	0	0	50	0

EUROPE										
Accommodation	Belgium	France	Germany	Italy	Netherlands	Norway	Portugal	Sweden	Switzerland	UK
Hotel	80	87	83	85	88	60	26	75	90	71
VFR	0	0	0	0	0	0	0	5	4	6
Business	1	0	1	0	0	20	0	5	2	9
Transit	18	13	16	12	11	20	74	15	4	14
Other	0	0	0	4	0	0	0	0	0	0

Source: Eswatini Tourism Authority

ACCOMMODATION STATISTICS

ROOMS AVAILABLE - 2020												
Hotel Name	January	February	March	April	May	June	July	August	September	October	November	December
Total Ezulwini	20553	19839	19981	7950	8649	8425	8370	8370	8100	8370	8448	8742
Total Manzini	20140	19163	20419	12810	13237	18570	19654	19964	19320	20119	19465	20119
Total Mbabane	5580	5220	5580	4987	5041	4987	4836	4762	3570	4836	4643	4836
Total Rest of Swaziland	22300	20988	23358	11422	13339	12600	16178	16213	15570	17143	16522	17092
Grand Total	68573	65210	69338	37169	40266	44582	49038	49309	46560	50468	49078	50789
Hotel Name	January	February	March	April	May	June	July	August	September	October	November	December
Total Ezulwini	11421	12109	10442	1079	1267	1788	807	1515	1737	2287	2148	2426
Total Manzini	1930	2728	2114	88	84	735	1030	1845	1899	2610	2545	2544
Total Mbabane	1639	1393	890	724	671	273	255	488	416	362	606	518
Total Rest of Swaziland	7264	9027	6898	2707	4441	3515	5334	6684	5317	5704	6396	6913
Grand Total	22254	25257	20344	4598	6463	6311	7426	10532	9369	10963	11695	12401
Hotel Name	January	February	March	April	May	June	July	August	September	October	November	December
Total Ezulwini	37262	36556	42023	16800	17856	17450	17515	16950	18631	17994	18631	275183
Total Manzini	38425	36601	38932	24810	25637	35640	37789	38254	37020	38657	37397	427839
Total Mbabane	9331	8729	9331	9134	9214	9134	8928	8780	6420	8928	8566	8928
Total Rest of Swaziland	45165	42547	44917	23234	28786	27570	36120	34806	36673	35481	36557	428064
Grand Total	130183	124433	135223	73978	81493	89794	100352	100757	95196	102889	99438	102773
Hotel Name	January	February	March	April	May	June	July	August	September	October	November	December
Total Ezulwini	17039	17638	16604	1111	1287	2080	902	1722	1898	2589	2552	2870
Total Manzini	2630	3819	2640	103	131	847	1144	2155	2153	3208	3208	4368
Total Mbabane	1776	1472	899	733	691	278	263	496	453	367	651	547
Total Rest of Swaziland	15153	16776	12249	4317	5873	5175	7835	9533	9166	9651	12470	12339
Grand Total	32980	39705	32392	6264	7982	8380	1044	13906	13670	15405	18881	20124
Hotel Name	January	February	March	April	May	June	July	August	September	October	November	December
Total Ezulwini	4215	4934	6280	198	377	916	621	1342	1444	1593	1527	1728
Total Manzini	978	1185	971	96	115	421	431	790	1059	1664	2010	2080
Total Mbabane	233	563	263	165	200	180	130	168	130	271	356	296
Total Rest of Swaziland	3435	5164	3263	761	3101	2536	3842	5443	4694	4155	6613	6064
Grand Total	8861	11846	10777	1220	3793	4053	4824	7743	7327	7683	10506	10168
Hotel Name	January	February	March	April	May	June	July	August	September	October	November	December
Total Ezulwini	13287	13009	11423	27	42	150	173	302	491	837	963	1211
Total Manzini	1156	1426	761	7	14	107	88	60	97	360	275	4756
Total Mbabane	721	551	158	8	15	14	12	13	6	32	66	112
Total Rest of Swaziland	6830	6744	4335	372	122	229	227	231	273	912	1268	1204
Grand Total	21994	21730	16677	414	193	500	606	867	2141	2572	2922	71126
Hotel Name	January	February	March	April	May	June	July	August	September	October	November	December
Total Ezulwini	17502	17943	17703	225	419	1066	794	1644	1935	2430	2490	2939
Total Manzini	2134	2611	1732	103	129	528	519	850	1156	2024	2285	2485
Total Mbabane	954	1114	421	173	215	194	142	181	136	303	422	4663
Total Rest of Swaziland	10265	11908	7598	1133	3223	2765	3869	5674	4967	5067	7881	7268
Grand Total	30355	33576	27454	1634	4553	5324	8349	8194	9824	13078	13100	159927
Hotel Name	January	February	March	April	May	June	July	August	September	October	November	December
Total Ezulwini	20,649	19,931.59	19,672,922.86	17,333,770.74	1,568,379.85	2,132,042.13	2,896,777.61	1,585,596.56	2,930,553.19	3,210,096.06	3,424,330.81	4,308,461.08
Total Manzini	4,276,233.07	4,276,758.20	2,988,783.99	298,236.00	131,689.00	1,028,007.60	1,582,187.42	2,287,841.55	2,785,398.81	2,657,786.35	3,340,353.21	6,7090
Total Mbabane	1,486,369.34	1,069,650.85	587,999.71	181,660.26	231,536.40	274,846.52	247,564.38	500,229.01	551,723.10	550,275.01	646,036.46	16556
Total Rest of Swaziland	9,913,242.95	13,222,813.61	9,037,574.96	2,748,324.26	4,794,741.44	3,901,836.32	6,255,523.71	7,605,105.93	6,490,468.38	6,952,171.04	8,164,713.12	85,434,413.63
Grand Total	34,766,962.95	38,242,155.52	29,928,129.40	4,796,620.37	7,290,008.97	8,101,468.05	9,670,872.07	13,323,729.68	12,894,930.01	13,122,860.55	14,505,768.44	16,668,386.60

MAIN PURPOSE OF VISIT

1. Expenditure per Person per Night = (Total Bill/ No. of Bed-Nights Sold)

Total Ezulwini	=	2977.11
Total Manzini	=	1090.13
Total Mbabane	=	783.50
Total Rest of Swaziland	=	730.71
Total	=	924.85

2. Average Length of Stay = (No. of Bed Nights Sold/ No. of Tourists)

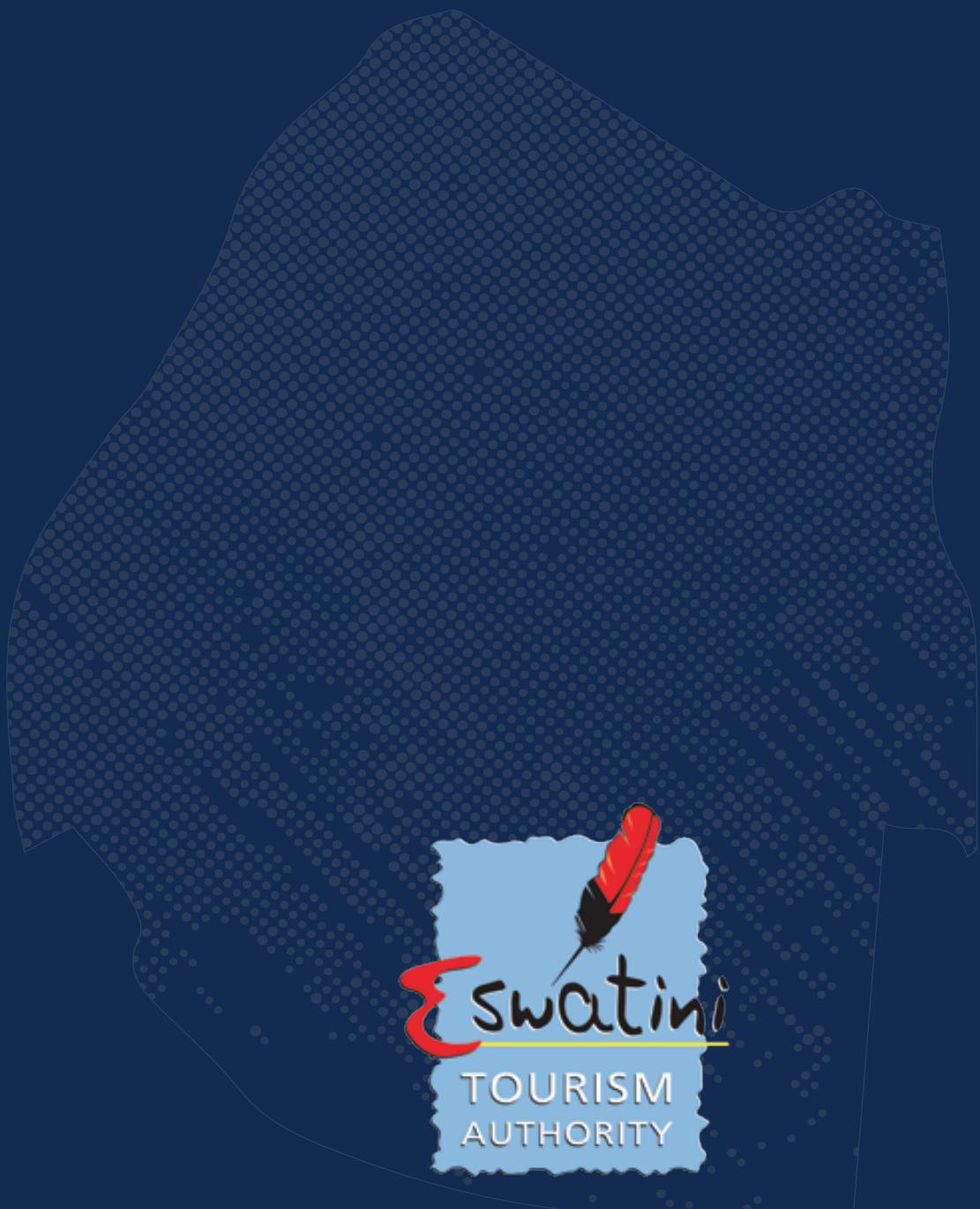
Total Ezulwini	1.017916232	=	1
Total Manzini	1.570186035	=	2
Total Mbabane	1.84988205	=	2
Total Rest of Swaziland	1.632536513	=	2
Total	1.374583404	=	1

3. Bed Occupancy Rates = [(No. of Bed Nights Sold/ No. of Beds Available)*100%]

Total Ezulwini	0.248	=	24.82
Total Manzini	0.061	=	6.08
Total Mbabane	0.082	=	8.18
Total Rest of Swaziland	0.273	=	27.31
Total	0.178	=	17.78
		=	

4. Room Occupancy Rates = [(No. of Room Nights Sold/ No. of rooms Available)*100%]

Total Ezulwini	0.361	=	36.10
Total Manzini	0.090	=	9.04
Total Mbabane	0.140	=	13.99
Total Rest of Swaziland	0.346	=	34.63
Total	0.238	=	23.79



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