



STA International Visitor Survey Report for 2006

Contents

i. Foreword	2
ii. Introduction	3
1. Tourism in 2006.....	4
1.1 Global Tourism.....	4
2. Swaziland Tourism.....	5
2.1 Swaziland Overview.....	5
3. Foreign Tourist Arrivals to Swaziland.....	6
3.1 Source markets of arrivals to Swaziland	6
4. Seasonality.....	9
4.1 Seasonality pattern of arrivals to Swaziland.....	9
5. Purpose of Visit.....	10
6. Mode of Transport.....	11
7. Length of Stay.....	12
8. Accommodation Usage	13
8.1 Distribution by category.....	13
9. Perceptions of tourists to Swaziland.....	14
10. List of Acronyms.....	15
11. Annexes	16

i. FOREWORD

One of STA's primary objectives is the provision of high-quality market research and intelligence work for effective tourism marketing. Over the years our research work has enabled us to demonstrate to Government the importance of tourism within the wider economy and to monitor trends in visitor demand and supply in order to guide decision making. STA has been increasingly aware of need for high-quality statistical data and as such with assistance from the Ministry of Tourism has undertaken a role in facilitating the enhancement of the tourism research through establishing a Tourism Satellite Account (TSA) for Swaziland. A committee comprising of the main producers of tourism data from government and organizations has been created to articulate a comprehensive strategy to achieve quality data that is reliable, accurate and consistent. This will involve the use of qualified methodologies, a mechanism to monitor tourism research developments, influence the commitment of all stakeholders in data production and provide specific advice in areas of continuing interest.

This report provides an overview of the performance of the tourism industry and increased understanding of Swaziland's external markets in the following areas:

- International tourism and its development
- Development of tourism within Swaziland
- Swaziland's inbound tourism incoming, characterization and expenditure – source markets for incoming travel to Swaziland and their profile

The STA Research Unit serves to guide the continued growth and success of the tourism industry through provision of robust data for monitoring performance and supporting marketing, planning and policy decisions. I am glad to present this report which will provide an evidence base for focused decision making.

Eric S. Maseko

Chief Executive Officer
Swaziland Tourism Authority

ii. Introduction

This report provides a summary of the key statistics on total visitor arrivals and information on the performance of Swaziland's major visitor-generating markets. All comparisons made in the document are year-on-year comparisons with 2005. The report presents results of data collected from the **Exit Survey** conducted by STA and the **Monthly Accommodation Survey** administered by the Central Statistical Office

- The **Exit Survey** is administered to foreign visitors departing by land or air who are 18 years of age or older at selected points of exit on specific days of each month. To conduct the survey seven (7) entry/exit points were selected, namely Ngwenya Border Post, Matsamo Border Post, Lomahasha Border Post, Lavumisa Border Post, Mahamba Border Post, Sandlane Border Post and Matsapha International Airport. The distribution of questionnaires is proportionate according to traffic flows for the identified exit points. At each point the enumerators intercept every 5th person where the respondent's intention to participate is elicited and upon confirmation the actual interviewing takes place. Personal interviewers positioned next to the Immigration counters assist the respondent by filling the forms. Data on the population i.e. international visitor arrival figure (gathered from Immigration) is used to weight data from the survey. For the year 2006 a response rate of 86.3% was received. Data collected from the survey is used to provide information on international visitors' profile, travel behaviour, spend and perspectives on their stay in Swaziland.
- The **Monthly Accommodation Survey** is a study conducted in all formal accommodation establishments (ranging from hotels, motels, guest houses, self catering apartments, etc) throughout the country. Managers or frontline officers are requested to capture daily particulars of their guests through a guest register book and each month provide the following information; the number of guests by country, average length of stay, bed and room occupancy rate, average and overall expenditure.

The primary goal of this study is to enable policy makers, industry and stakeholders to understand the characteristics, preferences and expectations of tourists and to identify current and emerging issues as they relate to the services and facilities provided for visitors in Swaziland. This report contains analysis of the demographic, economic, social, and geographic data of tourists leaving Swaziland at the time of the survey; the opinion of visitors about their place of stay in Swaziland and services and facilities; mode of travel to Swaziland and sources of information on Swaziland for visitors and; determine pattern of visit, perceptions on value for money, holiday preferences.

To access this report online please visit the "Research & Media" section on the STA website www.welcometoswaziland.com. For further information on this study, please email research@tourismauthority.org.sz.

1. Tourism in 2006

1.1. Global tourism, 2006

'Another record year for world tourism'¹

With 842 million arrivals and a 4.5% growth rate, 2006 exceeded expectations as the tourism sector continued to enjoy above average results, making it a new record year for the industry.

One of the features of 2006 has been the continued positive results of emerging destinations, underscoring the links to economic progress. As one of the most dynamic economic sectors, Tourism has a key role among the instruments to fight against poverty, thus becoming a primary tool for sustainable development.

Focus on Africa: Africa has outpaced all other regions with almost twice the rate of global growth reaching 8.1% in 2006, following an already strong 2005. This star performance was led by **SubSaharan Africa** (+9.4%), while North Africa (+5.8%) also ended the year above average. Major destinations such as South Africa, Kenya and Morocco all continued to post excellent results.

Asia and the Pacific (+7.6%) was able to maintain its extraordinary growth level, both due to the recovery of Thailand and the Maldives from the impact of the December 2004 tsunami, as well as remarkable performances from emerging destinations in the region – international tourist arrivals in South Asia grew by 10%, boosted by India, the destination responsible for half the arrivals to the sub-region.

Europe performed on target last year (+4%). Germany took advantage of the Football World Cup 2006, while Italy had a strong comeback. Spain 's solid results also contributed to the generally positive outcome.

In the **Middle East**, international tourist arrivals are estimated to have risen by 4% in 2006, after the bumper years of 2004 and 2005, and in spite of the overall geopolitical situation, the Israel-Lebanon crisis in particular.

Although the **Americas** 2% growth might seem disappointing at first, regional results vary considerably. The rise in the USA was not sufficient to compensate for the weak development in Canada and Mexico. On the other hand, the results from Central (+6.1%) and South America (+7.2%) show how Latin America is on track to consolidating the positive outcome of recent years: Chile, Colombia, Guatemala, Paraguay and Peru all grew at double-digit-rates.

¹ UNWTO news release, 29 January 2007

2. Swaziland Tourism

2.1. Swaziland Overview

Growth in 2006 has been slower than expected and further characterized by redistribution of source market volumes with intense and unpredicted seasonality fluctuations. The stagnation was mainly contributed by a decline in growth from the country's main traditional markets these including RSA (Swaziland's main source market accounting for over 70% of international visitor arrivals), Germany, UK, the Netherlands and France. On the positive side the highlight of 2006 was the exceptionally remarkable performance of visitor arrivals from Portuguese speaking nations Mozambique – Swaziland's second source market- and Portugal. Portugal recorded a growth of 56.8% to 5,899 in 2006. Similarly Mozambican travelers to Swaziland grew by 29.8% to 287,939 in 2006. Other notable emerging source markets that recorded impressive growth are Australia (14.5%), USA (5.0%), Belgium (7.9%), Italy (5.7%) and Switzerland (14.9%).

Table 1

Profile table

	2005	2006	Growth %
<i>International Visitor Arrivals</i>	<i>1,182,141</i>	<i>1,199,858</i>	<i>+1.5</i>
<i>Tourist (overnight visitor)</i>	<i>836,956 (70.8)</i>	<i>873,497 (72.8)</i>	<i>+2.8</i>
<i>Same day visitor</i>	<i>128,853 (10.9)</i>	<i>172,780 (14.4)</i>	<i>+3.5</i>
<i>Transit/ passing through</i>	<i>209,239 (17.7)</i>	<i>153,581 (12.8)</i>	<i>-4.9</i>

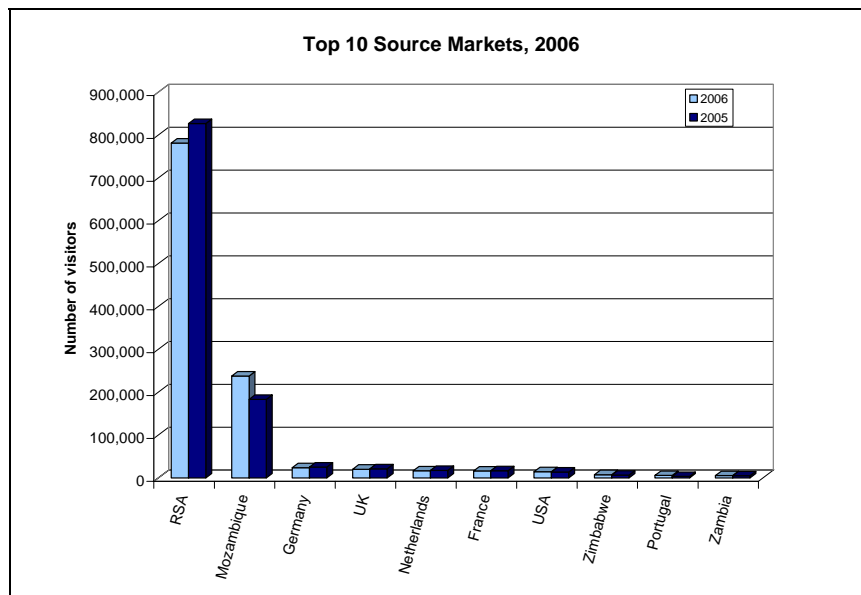
3. Foreign tourist arrivals to Swaziland 2006

3.1. Source markets of arrivals to Swaziland 2006

In 2006 Swaziland welcomed 1.18 million visitors registering a minimal growth of 1.5% over 2005. Again RSA remained Swaziland's top international visitor market accounting for a total of 781,075 visitor arrivals while Mozambique recorded an impressive 237,939, a growth of 29.8% compared to 2005.

Germany (23,975), United Kingdom (20,473), the Netherlands (16,696), France (16,428) and USA (14,699) were Swaziland's top five overseas visitor-generating markets in 2006. These seven markets accounted for over 92% of total visitor arrivals in 2006.

Figure 1



Source: STA in collaboration with Dep. Of Immigration

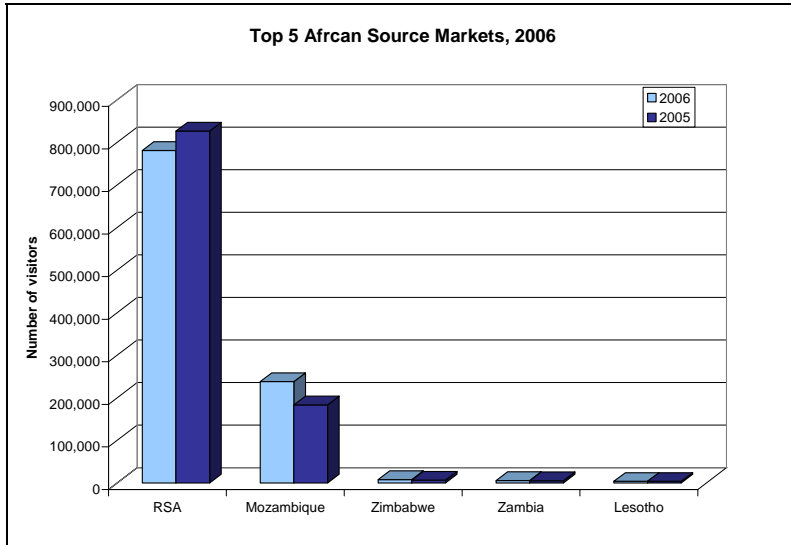
Table 2
Growth – Top 5

	2005	2006	Growth (%)
Mozambique	183,382	237,939	29.8
Portugal	3,762	5,899	56.8
India	2,396	3,071	28.2
Canada	2,470	3,175	5.0
Australia	2,333	2,672	14.5

Table 3
Decline – Top 5

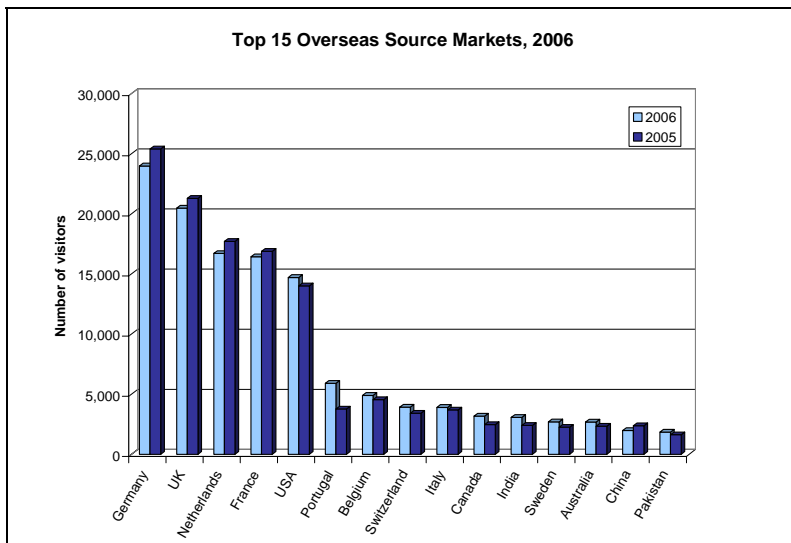
	2005	2006	Decline (%)
RSA	826,687	780,925	5.5
Germany	25,395	23,975	5.6
UK	21,283	20,473	3.8
Netherlands	17,703	16,696	5.7
France	16,880	16,428	2.7

Figure 2



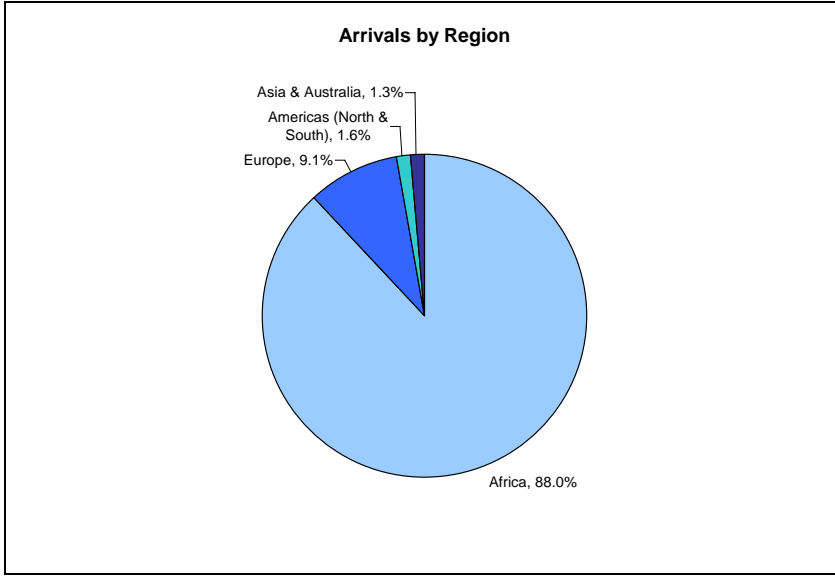
Source: STA in collaboration with Dep. Of Immigration

Figure 3



Source: STA in collaboration with Dep. Of Immigration

Figure 4



Source: STA in collaboration with Dep. Of Immigration

4. Seasonality

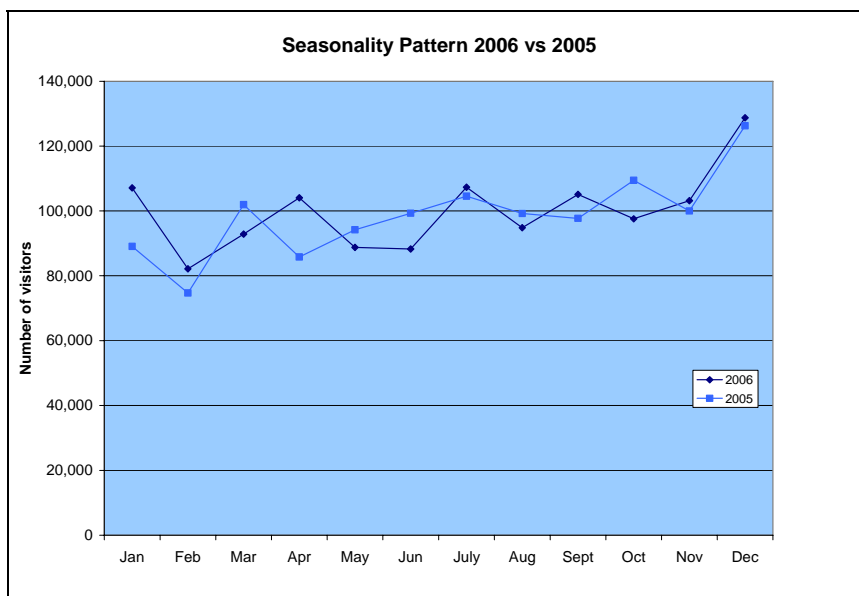
4.1. Seasonality pattern of foreign tourist arrivals to Swaziland

Throughout the year Swaziland suffered weakened growth as a result of stagnating performance from its main source market South Africa. The average fall for each month totaled 9,160 visitor arrivals.

Although no conclusive research has been undertaken yet on the likely factors contributing to the declining growth, it has been noted that the Asia Pacific has experienced expansion of low cost carrier services as well as a significant improvement in direct airline capacity from important source markets such as Europe and Middle East. Another likely possibility is the intensified marketing of other destinations within key source markets such South Africa and within Europe which has resulted in those destinations becoming a more desirable options for the next holiday. This indicates a need for more marketing presence of Swaziland in the respective source markets.

The Swaziland tourism industry experiences two seasons: the high season during the festive holidays and the low season during mid year. In 2006 the peak was recorded in December (126,246) with the months January, April and July registering mini-peaks. The lowest drop was noted in February and over the period May-June. It is worth noting that the peaks were recorded during RSA holiday seasons (December, January – festive season; April – Easter holidays, and; July – school holidays).

Figure 5

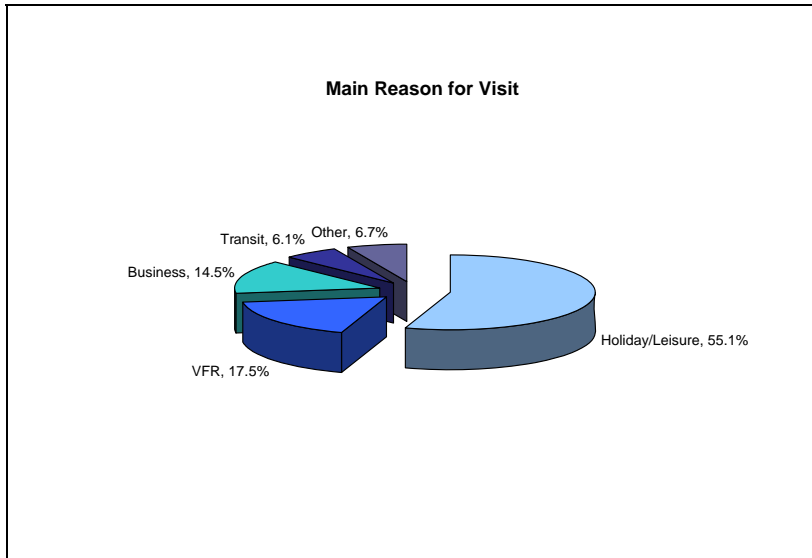


Source: STA in collaboration with Dep. Of Immigration

5. Purpose of visit

As seen in previous years, most surveyed travelers cited a 'holiday' (55.1%) as the main reason for visiting Swaziland over other destinations. Other frequently cited reasons were visiting friends and relatives (VFR) and business travel with a share of 17.5% and 14.5%, respectively. Of the holiday share 14.4% were day visitors and the remaining 72.8% for short breaks of at least one or two nights. A significant number of in-transit travelers (12.8%) who preferred to travel through Swaziland enroute to South Africa and Mozambique were registered.

Figure 6

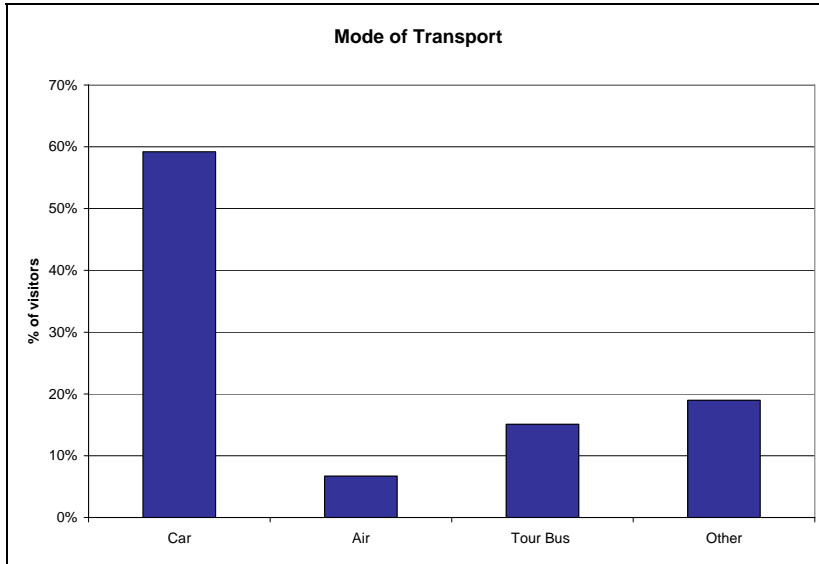


Source: Exit Survey, STA

6. Mode of transport

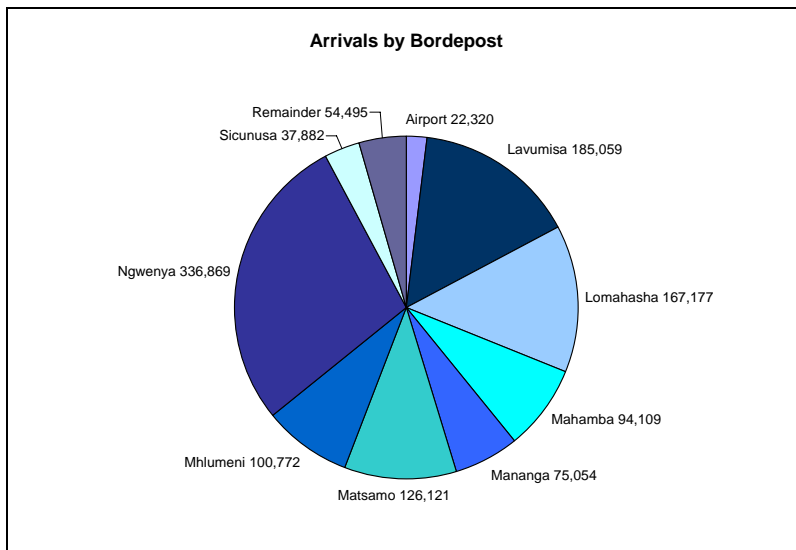
Visitor arrivals are dominated by road travel with self drives/ cars accounting for over 59% of total visitor arrivals and packaged tour travelers taking a 15% share. Air travel on the other hand accounted for 2%. The main gateway for road travel remains Ngwenya border post recording 336,869 entries in 2006. Lavumisa and Matsamo are mostly used by packaged tour holiday travelers who mainly combine Swaziland with Kruger National Park and the Wetlands in KwaZulu Natal. Arrivals through Lomahasha and Mhlumeni continued to increase with doubling of figures in selected months of 2006 as a result of visa scraping by the two countries in 2005.

Figure 7



Source: Exit survey, STA

Figure 8

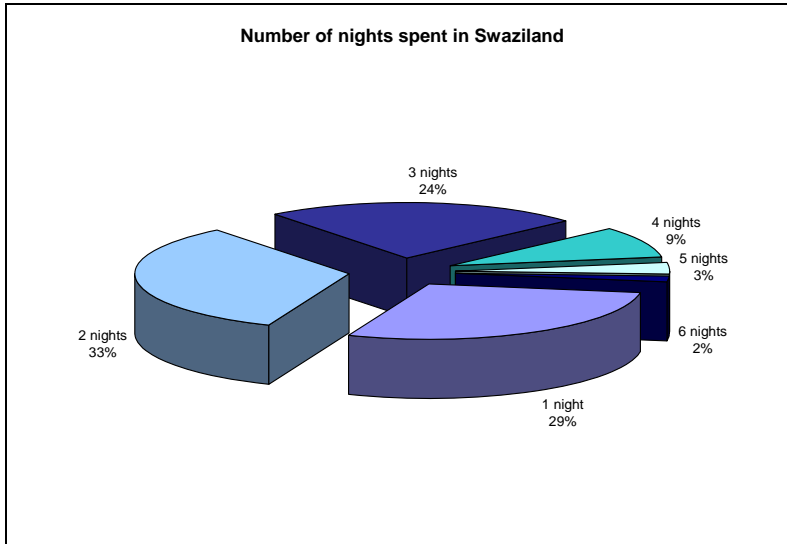


Source: STA in collaboration with Dep. Of Immigration

7. Length of stay

In 2006 the number of nights spent in Swaziland was impressive as more than 70% of visitors spent at least one night. The average duration of stay for all tourists remained at 2 nights while formal accommodation establishments recorded 1 night.

Figure 9



Source: Exit survey, STA

Table 4

Country of residence	Average length of stay (nights)
Belgium	1
France	1
Germany	2
Italy	2
Mozambique	2
Netherlands	2
RSA	2
Switzerland	1
UK	2
USA	3

Source: Exit survey, STA

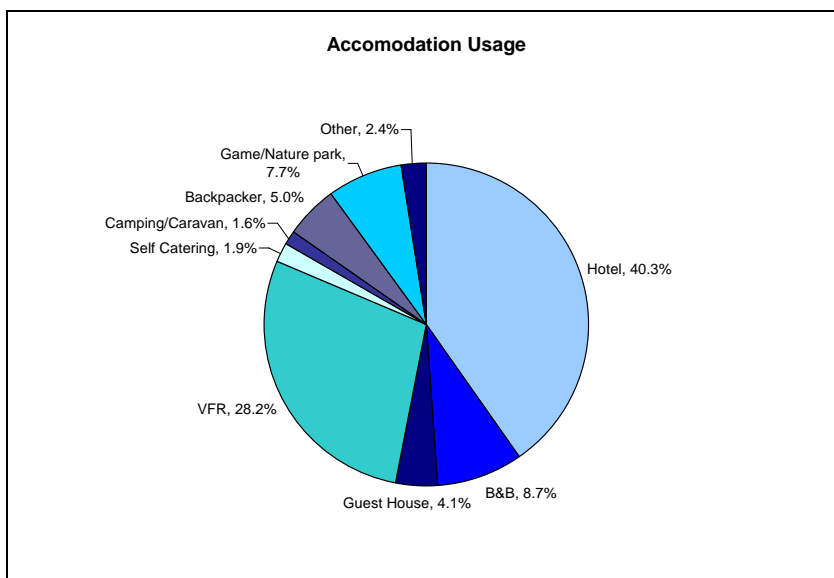
8. Accommodation Usage

8.1. Distribution by category

According to the Central Statistical Office a total of 316,082 tourists stayed in accommodation establishments during 2006. This represents an increase of 1.4% compared to 2005. The average length of stay for visitors in formal lodging places remained comparable to that of the previous year at 1 night.

Hotels accounted for the highest number of bednights sold with 40% while bed & breakfast and guesthouse accommodation registered 9% and 4%, respectively. Backpacker lodges (5%) are predominantly preferred by visitors from the UK, Switzerland, Belgium, Australia and Canada while camping & caravan (2%) are favourite amongst the Dutch (Netherlands). (See Annex IV)

Figure 10



Source: Exit survey, STA

8.2. Bednights Sold

The total bed capacity of all lodging accommodation in Swaziland at the end of 2006 was 919,809 in 41 facilities, an increase of 6% compared to the previous year. Although the number of beds available increased, bednights sold declined by 8% to 309,459. The average room occupancy rate increased by 3% to 50%.

Table 5

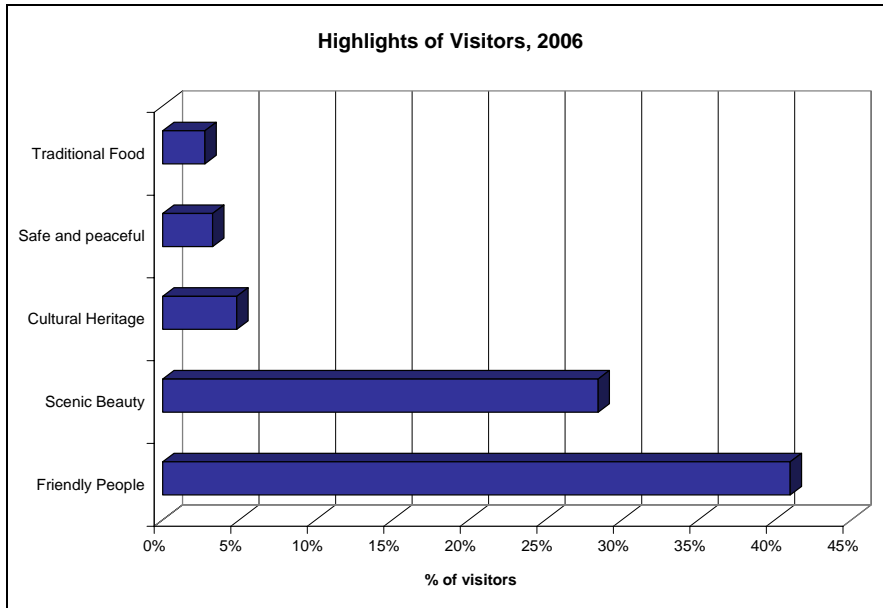
Year	Bednights sold	Rooms sold	Occupancy rate
2002	277,443	219,417	52.2%
2003	298,963	245,733	51.3%
2004	305,724	219,262	45.9%
2005	335,236	212,125	46.7%
2006	309,459	227,411	49.8%

Source: Tourism Unit, CSO

9. Perceptions of tourists to Swaziland

As seen in previous years, surveyed visitors continued to mention 'friendliness and the warmth of Swazi people' as the highlight of their visit. Scenic beauty, cultural heritage, safety and peace were also what they liked. Moreover more than four-in-five departing international visitors surveyed during 2006 stated that they have plans to return to Swaziland for another visit (93.7%). This is comparable to the prior year (95.6%).

Figure 11



Source: Exit survey, STA

Only 0.4% of surveyed travelers reported to have no plans to visit Swaziland again in the future; most often due to customer related services. Visitors further expressed lack of satisfaction particularly with regards to poor road signage, convenient parking bays and ablution facilities in central as what the least liked.

10. LIST OF ACRONYMS

CSO	Central Statistics Office
STA	Swaziland Tourism Authority
TSA	Tourism Satellite Account
VFR	Visiting Friends and Relatives
WTO	World Tourism Organisation

11.

ANNEXES

Annex I: International visitor arrivals.....16

Annex II: Reason for visit.....17

Annex III: Mode of travel.....18

Annex IV: Accommodation usage.....19

Annex V: Age group.....20

Annex VI: Travel partnership.....21

Annex VII: Activities engaged.....22

Annex VIII: Visit frequency.....23

Annex 1: International Visitor Arrivals

TABLE 1: International visitor arrivals

	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sept	Oct	Nov	Dec	Total
Africa	96,126	70,401	79,547	92,529	80,956	81,674	96,986	80,940	93,084	81,018	85,204	117,923	1,056,388
Botswana	208	238	141	436	266	98	313	294	263	224	289	620	3,390
Kenya	90	107	108	140	107	107	132	152	164	176	144	241	1,668
Lesotho	147	140	149	426	124	248	751	360	389	439	165	280	3,618
Malawi	132	181	168	205	160	193	204	218	210	234	206	285	2,396
Mozambique	18,907	19,743	17,707	17,792	15,846	15,771	19,400	18,493	21,990	22,040	21,628	28,622	237,939
Nigeria	148	140	185	160	186	186	185	218	265	234	248	299	2,454
RSA	74,931	48,390	59,432	71,105	62,546	63,423	74,145	58,957	67,433	55,630	60,535	84,548	781,075
Tanzania	172	222	207	223	195	193	236	294	305	312	268	396	3,023
Zambia	422	345	381	561	426	405	440	522	473	426	391	721	5,513
Zimbabwe	521	427	555	793	550	573	622	711	704	652	670	991	7,769
Other Africa	448	468	514	688	550	477	558	721	888	651	660	920	7,543
North & South America	1,425	1,093	1,882	2,318	1,207	1,517	2,082	1,660	1,367	1,486	1,588	1,320	18,945
Brazil	35	33	43	42	31	35	54	39	47	29	52	30	470
Canada	245	222	480	238	169	203	311	154	227	356	340	230	3,175
USA	1,107	789	1,334	2,004	980	1,253	1,631	1,324	1,049	1,056	1,155	1,017	14,699
Other America	38	49	25	34	27	26	86	143	44	45	41	43	601
Asia & Australia	1,362	995	1,164	1,355	1,127	1,113	1,362	1,385	1,397	1,267	1,412	1,382	15,321
Australia	233	156	207	202	195	150	193	258	324	260	309	185	2,672
China	184	140	151	161	169	203	193	162	177	146	134	155	1,975
India	238	230	232	356	255	265	279	275	270	235	206	230	3,071
Israel	81	58	58	57	27	26	32	57	46	71	186	67	766
Pakistan	174	140	157	180	134	132	172	193	158	124	144	134	1,842
Philippines	18	8	18	45	21	26	43	58	45	25	41	91	439
South Korea	55	66	41	53	80	79	64	132	75	55	72	88	860
Taiwan	164	90	126	156	131	115	139	172	149	207	155	130	1,734
Other Asia	215	107	174	145	115	117	247	78	153	144	165	302	1,962
Europe	8,191	9,669	10,256	7,848	5,478	3,965	6,871	10,849	9,257	13,799	14,935	8,086	109,204
Belgium	263	394	266	394	115	134	504	351	516	863	670	426	4,896
France	1,130	1,725	2,270	988	746	380	912	1,897	1,117	1,947	2,310	1,006	16,428
Germany	1,509	2,005	2,617	2,033	1,547	918	858	1,583	1,641	3,606	3,961	1,697	23,975
Italy	339	238	267	179	151	203	225	1,270	301	241	278	199	3,891
Netherlands	1,391	1,282	1,151	705	462	309	1,567	1,546	1,745	3,029	2,486	1,023	16,696
Norway	88	222	135	147	37	62	172	57	106	109	258	115	1,508
Portugal	427	304	366	487	417	450	536	693	586	510	526	597	5,899
Sweden	300	394	381	164	73	44	69	41	136	312	444	334	2,692
Switzerland	532	411	227	271	123	150	193	182	293	455	650	435	3,922
UK	1,492	1,922	1,922	1,868	1,320	971	1,234	2,197	1,986	1,856	2,217	1,488	20,473
Other Europe	720	772	654	612	487	344	601	1,032	830	871	1,135	766	8,824
GRAND TOTAL	107,104	82,158	92,849	104,050	88,768	88,269	107,301	94,834	105,105	97,570	103,139	128,711	1,199,858

Annex II: Reason for visit

COUNTRY/ REASON FOR VISIT						
Country	Holiday	Business	VFR	Transit	Other	TOTAL
Africa						
Lesotho	36.0%	16.0%	32.0%	16.0%	0.0%	100.0%
Mozambique	16.4%	26.1%	32.3%	14.6%	10.6%	100.0%
RSA	39.6%	19.1%	24.9%	6.1%	10.3%	100.0%
Zimbabwe	19.3%	19.3%	49.1%	10.5%	1.8%	100.0%
America						
Canada	87.2%	3.2%	2.1%	2.1%	5.3%	100.0%
USA	73.3%	8.6%	8.1%	8.1%	1.8%	100.0%
Asia & Australia						
Australia	92.9%	4.8%	1.2%	0.0%	1.2%	100.0%
Europe						
Belgium	97.5%	0.0%	0.0%	0.0%	2.5%	100.0%
France	97.5%	1.4%	0.6%	0.3%	0.3%	100.0%
Germany	98.1%	0.5%	0.6%	0.1%	0.6%	100.0%
Italy	91.9%	0.0%	2.0%	1.0%	5.1%	100.0%
Netherlands	98.9%	0.2%	0.3%	0.2%	0.5%	100.0%
Norway	85.4%	9.8%	2.4%	2.4%	0.0%	100.0%
Portugal	62.5%	0.0%	18.8%	0.0%	18.8%	100.0%
Sweden	92.8%	0.0%	0.0%	2.9%	4.3%	100.0%
Switzerland	95.9%	1.0%	1.0%	0.0%	2.1%	100.0%
UK	86.9%	6.1%	3.5%	1.2%	2.3%	100.0%

Annex III: Mode of Travel

TABLE 3: 2006					
COUNTRY / MODE OF TRAVEL					
Country	Car	Tour Bus	Airplane	Other	TOTAL
Africa					
Lesotho	56.0%	0.0%	20.0%	24.0%	100.0%
Mozambique	55.1%	0.5%	0.7%	43.8%	100.1%
RSA	69.9%	3.9%	7.8%	18.3%	99.8%
Zimbabwe	31.6%	1.8%	28.1%	38.7%	100.1%
America					
Canada	46.2%	29.0%	6.5%	18.3%	100.0%
USA	64.1%	9.9%	16.6%	9.3%	99.9%
Asia & Australia					
Australia	57.1%	21.4%	6.0%	15.5%	100.0%
Europe					
Belgium	58.5%	36.4%	0.0%	5.0%	99.9%
France	46.9%	45.2%	1.1%	6.7%	100.0%
Germany	41.5%	50.8%	0.6%	7.1%	100.0%
Italy	86.0%	5.0%	6.0%	3.0%	100.0%
Netherlands	55.7%	38.8%	0.3%	5.3%	100.1%
Norway	48.8%	39.0%	7.3%	4.9%	100.0%
Portugal	87.5%	0.0%	6.3%	6.3%	100.1%
Sweden	37.7%	53.6%	1.4%	7.2%	100.0%
Switzerland	72.4%	16.3%	1.0%	10.1%	99.9%
UK	51.6%	24.2%	11.1%	13.1%	100.0%

Annex IV: Accommodation usage

TABLE 4: 2006 COUNTRY/ ACCOMMODATION USAGE										
Country	Hotel	B&B	Guest house	VFR	Self catering	Camping/ caravan	Backpacker	Game/ nature park	Other	TOTAL
Africa										
Lesotho	34.8%	8.7%	4.3%	47.8%	0.0%	0.0%	4.3%	0.0%	0.0%	100.0%
Mozambique	9.0%	6.2%	2.7%	69.5%	7.6%	0.5%	0.4%	3.9%	0.3%	100.0%
RSA	38.8%	7.1%	3.4%	41.6%	1.4%	1.3%	1.7%	2.0%	2.6%	100.0%
Zimbabwe	22.6%	11.3%	1.9%	50.9%	0.0%	0.0%	1.9%	1.9%	9.4%	100.0%
America										
Canada	53.7%	3.7%	6.1%	6.1%	0.0%	1.2%	13.4%	14.6%	1.2%	100.0%
USA	36.2%	5.9%	8.5%	17.0%	2.7%	2.1%	9.6%	12.2%	5.9%	100.0%
Asia & Australia										
Australia	29.6%	8.5%	4.2%	11.3%	4.2%	5.6%	14.1%	19.7%	2.8%	100.0%
Europe										
Belgium	43.4%	21.7%	1.2%	1.2%	0.0%	1.2%	14.5%	16.9%	0.0%	100.0%
France	55.7%	19.3%	4.5%	0.6%	0.6%	1.5%	4.5%	11.9%	1.5%	100.0%
Germany	67.4%	10.1%	3.0%	0.8%	0.5%	2.2%	6.1%	9.1%	0.8%	100.0%
Italy	59.1%	12.5%	4.5%	4.5%	0.0%	1.1%	2.3%	10.2%	5.7%	100.0%
Netherlands	46.6%	12.0%	4.7%	0.9%	0.5%	3.7%	8.2%	23.0%	0.5%	100.0%
Norway	52.6%	5.3%	13.2%	5.3%	0.0%	0.0%	13.2%	2.6%	7.9%	100.0%
Portugal	20.0%	40.0%	0.0%	40.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Sweden	68.5%	5.6%	3.7%	1.9%	0.0%	0.0%	11.1%	5.6%	3.7%	100.0%
Switzerland	42.1%	15.8%	1.3%	1.3%	0.0%	2.6%	17.1%	17.1%	2.6%	100.0%
UK	36.6%	5.7%	4.7%	10.1%	2.0%	2.0%	19.8%	16.1%	3.0%	100.0%

Annex V: Age Group

TABLE 5: 2006 COUNTRY/AGE GROUP							
Country	18-24	25-34	35-44	45-54	55-64	65+	TOTAL
Africa							
Lesotho	4.0%	32.0%	48.0%	16.0%	0.0%	0.0%	100.0%
Mozambique	12.3%	39.3%	33.5%	11.7%	2.7%	0.5%	100.0%
RSA	9.6%	27.0%	35.0%	19.3%	7.1%	1.9%	100.0%
Zimbabwe	12.5%	17.9%	46.4%	23.2%	0.0%	0.0%	100.0%
America							
Canada	10.8%	25.8%	24.7%	7.5%	15.1%	16.1%	100.0%
USA	15.2%	23.0%	22.6%	11.5%	15.7%	12.0%	100.0%
Asia & Australia							
Australia	11.8%	34.1%	25.9%	10.6%	8.2%	9.4%	100.0%
Europe							
Belgium	10.3%	25.9%	33.6%	15.5%	5.2%	9.5%	100.0%
France	4.6%	25.4%	31.9%	17.9%	12.0%	8.3%	100.0%
Germany	3.5%	21.2%	33.7%	16.5%	9.0%	16.1%	100.0%
Italy	3.0%	31.3%	39.4%	19.2%	3.0%	4.0%	100.0%
Netherlands	8.4%	25.0%	29.6%	16.3%	9.4%	11.3%	100.0%
Norway	17.5%	12.5%	22.5%	15.0%	10.0%	22.5%	100.0%
Portugal	0.0%	43.8%	25.0%	18.8%	6.3%	6.3%	100.0%
Sweden	7.5%	26.9%	22.4%	19.4%	11.9%	11.9%	100.0%
Switzerland	6.3%	40.0%	30.5%	13.7%	4.2%	5.3%	100.0%
UK	12.9%	24.9%	23.2%	15.8%	13.2%	10.0%	100.0%

Annex VI : Travel Partnership

**TABLE 7: 2006
COUNTRY/ TRAVEL PARTNERSHIP**

Country	Alone	With partner	With colleagues	With Children 18 yrs	With family	Packaged tour	Other	TOTAL
Africa								
Lesotho	28.0%	12.0%	24.0%	4.0%	32.0%	0.0%	0.0%	100.0%
Mozambique	42.2%	16.5%	20.8%	1.9%	17.7%	0.9%	0.0%	100.0%
RSA	28.9%	20.6%	21.1%	1.8%	24.3%	3.2%	0.0%	100.0%
Zimbabwe	52.6%	12.3%	22.8%	0.0%	10.5%	1.8%	0.0%	100.0%
America								
Canada	6.5%	16.3%	22.8%	1.1%	16.3%	37.0%	0.0%	100.0%
USA	15.3%	24.8%	28.8%	0.0%	19.8%	11.3%	0.0%	100.0%
Asia & Australia								
Australia	9.5%	21.4%	25.0%	1.2%	15.5%	27.4%	0.0%	100.0%
Europe								
Belgium	0.8%	30.8%	15.0%	0.8%	16.7%	35.8%	0.0%	100.0%
France	3.1%	21.0%	11.8%	0.6%	13.7%	49.6%	0.3%	100.0%
Germany	2.1%	24.5%	8.9%	0.1%	9.5%	54.9%	0.0%	100.0%
Italy	5.0%	50.5%	19.8%	0.0%	17.8%	6.9%	0.0%	100.0%
Netherlands	1.5%	31.1%	9.6%	0.0%	15.1%	42.7%	0.0%	100.0%
Norway	9.8%	9.8%	22.0%	0.0%	17.1%	41.5%	0.0%	100.0%
Portugal	6.3%	31.3%	37.5%	0.0%	25.0%	0.0%	0.0%	100.0%
Sweden	1.4%	20.3%	14.5%	0.0%	8.7%	55.1%	0.0%	100.0%
Switzerland	5.2%	43.3%	12.4%	0.0%	18.6%	20.6%	0.0%	100.0%
UK	13.2%	26.7%	22.3%	1.2%	12.3%	24.3%	0.0%	100.0%

ANNEX VII: Activities engaged

TABLE 8: 2006
COUNTRY / ACTIVITIES

	Wildlife	Adventure	Sporting	Nightlife	Casino	Natural attractions	Cultural, historical & heritage	Handicraft shopping	Shopping	Business	Trading	Social	Other	Total
Africa														
Lesotho	6.3%	4.2%	6.3%	10.4%	4.2%	8.3%	8.3%	6.3%	8.3%	8.3%	0.0%	16.7%	12.5%	100.0%
Mozambique	3.6%	1.4%	1.7%	8.5%	3.1%	17.3%	4.0%	6.3%	29.6%	10.6%	10.8%	2.1%	1.0%	100.0%
RSA	6.3%	4.8%	7.1%	7.1%	9.2%	12.1%	7.3%	8.4%	9.7%	11.6%	0.3%	10.1%	5.9%	100.0%
Zimbabwe	6.7%	2.2%	4.4%	7.8%	3.3%	10.0%	12.2%	5.6%	23.3%	10.0%	0.0%	5.6%	8.9%	100.0%
America														
Canada	16.5%	4.5%	0.5%	1.5%	1.0%	16.5%	24.0%	14.0%	16.0%	1.0%	0.0%	1.5%	3.0%	100.0%
USA	18.6%	5.6%	1.6%	2.6%	2.8%	17.4%	17.6%	17.0%	6.8%	3.8%	0.0%	2.6%	3.8%	100.0%
Asia & Australia														
Australia	19.1%	7.0%	2.5%	3.0%	2.0%	18.1%	17.1%	18.6%	8.0%	2.5%	0.0%	2.0%	0.0%	100.0%
Europe														
Belgium	12.3%	5.0%	1.4%	1.8%	0.9%	23.6%	20.9%	24.1%	8.2%	0.5%	0.0%	0.5%	0.9%	100.0%
France	13.7%	3.1%	1.7%	0.6%	0.8%	19.9%	23.7%	20.1%	12.7%	1.0%	0.0%	0.8%	1.9%	100.0%
Germany	11.4%	3.0%	1.5%	1.3%	1.1%	20.9%	23.9%	19.9%	14.4%	0.4%	0.3%	0.3%	1.5%	100.0%
Italy	16.2%	1.4%	1.9%	1.4%	1.0%	28.6%	19.5%	21.9%	5.2%	1.0%	0.5%	0.5%	1.0%	100.0%
Netherlands	15.9%	3.4%	1.6%	1.2%	0.8%	23.1%	21.6%	22.1%	8.1%	0.4%	0.1%	0.4%	1.3%	100.0%
Norway	7.5%	3.8%	1.3%	1.3%	0.0%	18.8%	27.5%	15.0%	16.3%	5.0%	0.0%	2.5%	1.3%	100.0%
Portugal	9.1%	12.1%	9.1%	3.0%	6.1%	6.1%	15.2%	9.1%	21.2%	0.0%	0.0%	9.1%	0.0%	100.0%
Sweden	8.7%	2.9%	0.7%	0.7%	0.0%	11.6%	29.0%	13.0%	23.9%	0.0%	0.0%	2.2%	7.2%	100.0%
Switzerland	19.3%	3.2%	2.1%	1.1%	1.1%	17.6%	23.5%	21.4%	7.5%	0.5%	0.0%	0.0%	2.7%	100.0%
UK	18.5%	5.8%	4.1%	3.7%	3.4%	18.4%	18.8%	13.6%	7.7%	2.5%	0.2%	1.8%	1.4%	100.0%

Annex VIII: Visit frequency

TABLE 9: 2006 COUNTRY / VISIT FREQUENCY								
Country	First visit	1 visit	2-3 visit	4-5 visit	Less frequently	Once a month	Once a week	Total
Africa								
Lesotho	20.0%	40.0%	12.0%	4.0%	24.0%	0.0%	0.0%	100.0%
Mozambique	16.4%	2.7%	14.7%	22.1%	33.0%	8.9%	2.3%	100.0%
RSA	13.5%	17.9%	25.1%	21.5%	14.1%	6.6%	1.3%	100.0%
Zimbabwe	7.0%	28.1%	24.6%	17.5%	17.5%	5.3%	0.0%	100.0%
America								
Canada	27.2%	45.7%	2.2%	8.7%	2.2%	13.0%	1.1%	100.0%
USA	22.7%	50.5%	9.5%	5.5%	5.9%	5.9%	0.0%	100.0%
Asia & Australia								
Australia	28.6%	48.8%	11.9%	4.8%	4.8%	1.2%	0.0%	100.0%
Europe								
Belgium	47.5%	35.8%	4.2%	4.2%	3.3%	4.2%	0.8%	100.0%
France	37.0%	39.9%	6.0%	4.3%	7.1%	4.0%	1.7%	100.0%
Germany	52.5%	24.9%	5.1%	5.8%	5.8%	5.3%	0.6%	100.0%
Italy	22.7%	62.9%	7.2%	3.1%	3.1%	0.0%	1.0%	100.0%
Netherlands	44.1%	38.9%	3.8%	3.6%	4.9%	3.6%	1.1%	100.0%
Norway	48.8%	19.5%	2.4%	2.4%	26.8%	0.0%	0.0%	100.0%
Portugal	12.5%	31.3%	6.3%	0.0%	50.0%	0.0%	0.0%	100.0%
Sweden	76.8%	15.9%	2.9%	1.4%	2.9%	0.0%	0.0%	100.0%
Switzerland	55.2%	37.5%	3.1%	1.0%	3.1%	0.0%	0.0%	100.0%
UK	45.4%	41.6%	6.8%	2.1%	4.1%	0.0%	0.0%	100.0%