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**Development of a strategy for sustainable tourism in Eswatini
(ESW-006)**

REPORT AND RECOMMENDATIONS

Ramesh Chaitoo & Anna McGinn
Consultants

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LIST OF ACRONYMS / ABBREVIATIONS

ATTA	The African Travel & Tourism Association
B&B	Bed and breakfast
DMC	Destination management company
ESW	Eswatini
ETA	Eswatini Tourism Authority
ICT	Information and communications technology
GDP	Gross domestic product
HOTAES	Hospitality and Tourism Association of Eswatini
MTB	Mountain bike
SATSA	Southern Africa Tourism Services Association
SWOT	Strengths, Weaknesses, Opportunities and Threats
TSA	Tourism Satellite Account
UNWTO	World Tourism Organization
WTTC	World Travel and Tourism Council

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1 Introduction

In February 2020, the African Development Bank (AfDB) reported:

Eswatini has been stuck in low growth trap over the past two decades and continues to face significant development challenges. Real GDP growth fell from an annual average of 4.9 % over the period 1990-1999 to 3.4% during the period 2000–2009, before further sliding to 2.4% over 2010-2019. Since 2014, growth averaged less than 2 % and the economy has been beset by macroeconomic imbalances emanating from the volatile Southern Africa Customs Union (SACU) receipts, prolonged drought effects, a weak external environment and a challenging business and investment climate. Capital formation has been small, private investment has been low and declining, while competitiveness has remained stagnant, constrained by among others, old and inadequate infrastructure stock. Government faces mounting challenges characterized by persistent fiscal deficits, growing domestic arrears, depleted reserves and rapidly rising public debt. Although a low-Middle Income Country (MIC), Eswatini faces high levels of unemployment, inequality and deep poverty.¹

Nevertheless, in listing opportunities for Eswatini, the AfDB pointed out – “**Unexploited tourism potential:** Eswatini’s outstanding natural beauty, magnificent scenery, excellent game parks and a strong cultural heritage and biodiversity are strong attractions for tourists.”

Although it is a small country, Eswatini boasts four unique geographical zones with different altitudes and vegetation —the mountainous Highveld, the subtropical Middleveld, the Lowveld and the Lubombo mountains. A key stakeholder in Eswatini’s tourism industry described the development of the tourism sector in Eswatini as “an accident”, noting that any success that the country has met in this sector was largely a result of the country’s geographic position (i.e. close to Durban, Maputo, Johannesburg, Kruger National Park, etc.). Furthermore, the National Tourism Policy (2010) described the Swazi tourism sector as one that has “existed largely in rhetoric, without concrete measures to ensure that the sector leads national efforts in poverty alleviation and employment creation and economic growth”. Eswatini’s tourism sector has also been described as a ‘spill-over’, ‘in-transit’ or ‘pick-up’ destination.

These less than flattering descriptions are underscored by the fact that within Southern Africa, Eswatini’s tourism sector is one of the region’s less impressive performers. Additionally, growth in international arrivals over the past 10 years, while fluctuating up and down year on year, has not increased from the 2012 levels. Eswatini is not achieving its full potential in travel and tourism.

While this is the case, it should be noted that the tourism sector in Eswatini should not be as *ad hoc* as it sounds above. The first national tourism strategy was adopted in 1999 and the first national tourism policy in 2000. Since then, a revised national tourism policy was adopted in 2010 and a revised tourism strategy in 2011.²

It must be assumed that the low growth rate that the sector is facing, paired with the comparable success in tourism that Eswatini’s neighbours achieved in recent years, is not a result of a lack of vision on Eswatini’s part, but rather a lack of implementation of changes. This may be largely due to the lack of financial resources; or it simply reflects a lack of value for the tourism sector by policymakers; and inertia by tourism operators.

While implementation may be linked to resource constraints, it appears that efforts are not being made to address continuing problems faced by the tourism sector. For example, ‘Poor Road Signage’ was a top complaint noted in Swaziland Tourism Authority’s 2005 report and every single year since. It is also highlighted in the 2010 National Tourism Policy and the 2013 product development strategy. The fact that this relatively straightforward challenge has persisted for at least 15 years is a reflection on the extent to

¹ ADB, Eswatini: Country Strategy Paper 2020-2024, February 2020

² In addition, the Swaziland Tourism Authority (STA) had commissioned marketing and product development strategies through the Commonwealth Secretariat.

which improvements in the sector are not being implemented. The authorities responsible for roads and the tourism entities need to come together to address this problem.

Two important observations should be noted here: firstly, the National Tourism Strategy of 2011 did not provide sufficient direction to address and achieve the objectives and strategies outlined in the National Tourism Policy of 2010. Secondly, the marketing strategy was not a direct reflection of the National Tourism Strategy, but rather seemed to serve as a stand-alone strategy. These invariably also resulted in a lack of implementation success for a number of reasons: insufficient direction, inefficient use of resources, stakeholders 'not on the same page' and perhaps even a discord between the two critical organizations, the Ministry of Tourism and the Tourism Authority, to name a few.³

There is now a new Tourism Policy from 2019 but it is not clear who is supposed to be implementing it. Attempts by the consultants to meet with Ministry of Tourism officials were not successful. And there was no official comment on the status of the Tourism Policy or the 2019 Tourism Bill which seems to have lost its way.⁴ Furthermore, it was not possible to obtain a copy of the new draft marketing strategy that the Tourism Authority (ETA) has sent to the Cabinet for approval. And key tourism stakeholders also indicated that they have no idea what has been proposed in the draft marketing strategy for tourism.

The COVID-19 pandemic wreaked havoc on the tourism sector in Eswatini and all over the world. But the challenge is to address pre-existing issues in order for the sector to rebound. No one can argue that the tourism potential of Eswatini is not significant. It is a naturally beautiful and culturally rich country; there is sufficient accommodation available; as well as things to do. In addition, feedback captured in the exit-surveys from visitors over the years has been overwhelmingly positive.

Furthermore, growth in the tourism sector will lead to employment gains and it often absorbs young people. The National Skills Audit Report (2022) revealed that the national unemployment rate stands at 33.3 per cent while youth unemployment is at 58.3 per cent. It is therefore critical to help stimulate the recovery of the tourism sector to address the crippling unemployment situation which is fuelling the civil unrest in Eswatini.

³ Objective 1 of the National Tourism Strategy was to diversify source markets, while the marketing strategy decisively took a different direction of narrowing source markets.

⁴ It does not augur well that the website of the Ministry of Tourism and the Environment still lists the Permanent Secretary as the previous one who passed away almost two years ago.

2 Impact of Covid-19 Pandemic

Like everywhere else, the tourism sector in Eswatini was totally disrupted during the pandemic. Total visitors fell from 1,225,520 in 2019 to 345,348 in 2020. Two major hotels went out of business – Lugogo Sun and Royal Swazi. This resulted in significant loss of jobs and 600 tourist beds. Many tourism businesses coped by reducing staff wages or rotating staff (one week on, one week off) to ensure that their workers still had some income but the effect of COVID-19 on the tourism sector and the economy was drastic.

A sample survey of 24 businesses indicated the following percentage decreases in revenue from December 2019 to December 2020.⁵ Total staff employed fell from 1,220 to 875. And the biggest employer's full-time staff was reduced by 56.4% (from 397 to 180).

Table 1. Reduction in revenue of tourism businesses

Number of companies	% decrease in revenue from December 2019 to December 2020
3	100
2	90
4	80
4	70-79
4	50-69
3	40-49
2	Less than 40
1	No decrease in revenue

The loss of visitors from even South Africa led to some growth in domestic tourism. Siswatis and expatriates could not travel to South Africa or overseas so they explored domestic tourism offerings; but with a small population and low purchasing power as well as high unemployment, it is unlikely that domestic tourists can spark an economic recovery.

As a result of the pandemic and other pre-existing issues, the following are some key challenges facing the tourism sector in Eswatini:

1. How to rebuild & increase total visitors post-pandemic?
2. How to increase stay-over visitors and increase the average stay to at least 7 nights?
3. How to consolidate the offerings of tourism operators to make Eswatini appeal to more tourists from Europe & North America?
4. How to develop an industry-wide approach to promotion of Eswatini as a tourism destination.
5. How to improve standards and the quality and consistency of service across the entire tourism sector?
6. How to increase overall competitiveness?
7. How to turn HOTAES into a professional outfit that can effectively guide and seek the interests of the tourism sector

These and related issues will be discussed in this report in an attempt to identify the elements of a sustainable tourism development strategy and a revamped role for the Hospitality and Tourism Association of Eswatini (HOTAES). A summary SWOT analysis of the tourism sector is shown in Figure 1 below.

⁵ A questionnaire was sent to 87 members of HOTAES, of which 24 responded.

Figure 1. SWOT Analysis of the Tourism Sector in Eswatini

<u>STRENGTHS</u>	<u>WEAKNESSES</u>
1. Key geographic position (near major cities, located in Southern African tourism corridor) 2. Small-size (proximity of attractions) & up-close viewing of wildlife 3. Relatively safe (particularly in comparison to South Africa) 4. Un-spoilt natural environment and several protected areas (game reserves & nature reserves) 5. 350+ species of birds and several rare or unique plants and animals 6. Many different types of activities for tourists (24), including several adventure-related vacation options – biking, trail running, abseiling. 7. Add-on to South African and Mozambican holidays 8. Good road infrastructure in transport corridors with South Africa 9. Year-round destination 10. English-speaking 11. Excellence in handicrafts 12. Many annual events that can attract tourists - top African contemporary festival (Bushfire)	1. Limited human and financial resources available for sector development 2. Lack of communication/collaboration between public and private sector, and within the public and private sectors 3. Service quality issues in many tourism establishments 4. Limited destination awareness in originating markets (outside of region) 5. Low air arrivals and limited to only flights from Johannesburg & not perceived as a 'stand-alone' destination'. (RENAC hopes to start flights to Cape Town, Durban, Joburg and Harare) 6. Low average stay length & low international repeat visits 7. Perception as a transit destination only 8. Low adherence to internationally recognized accommodation standards 9. Poorly resourced tourism association 10. Inadequate marketing efforts at the national and private sector levels 11. Limited online or Internet presence 12. Dates of annual events (cycle races, etc.) are set too late for foreigners to plan trips around them 13. Expensive, slow Internet impedes marketing efforts (e.g. regular social media contribution, video and photo uploads) 14. Weak differentiation- Lack of gender-related niche marketing (i.e. differing product offerings to men, women and couples within tourist packages) 15. Weak human resource development strategy in the education system and for lower-level employees.
<u>OPPORTUNITIES</u>	<u>THREATS</u>
1. Growing emerging source-markets in the region (Botswana, Zimbabwe, Malawi) 2. Growing regional self-drive market 3. Potential in trending sub-sectors such as eco-tourism, volunteer tourism, adventure tourism and responsible tourism 4. Digital marketing / social media marketing 5. Develop tourism packages with various activities for tourists with different interests and in various demographics	1. Civil unrest has led to travel advisory warnings about Eswatini in several long-haul source markets 2. Increasing regional/global competition for tourists 3. South African travel requirements re travelling with children 4. Low interest in Eswatini from international tour operators 5. Apparent inability to attract tourists directly to Eswatini (not via South Africa) 6. Re-opening of Ngwenya iron ore mine 7. Planned coal mining & Coal fired thermal power station 8. Impact of the Russia – Ukraine war 9. Litter/garbage 10. Poor Internet service

3 Trends in Travel and Tourism

There are various factors that have affected the global hospitality, tourism and travel sector in recent years. The period immediately before the COVID-19 pandemic saw the growth of Eco-travel and significant increase in Wellness Travel and the emergence of Conscious Travel. Ecotourism is a form of sustainable travel that supports the local environment instead of putting more pressure on it and exploiting its resources. In other words, it encourages the exploration and conservation of natural environments while keeping visitor impact low. A Wellness Vacation can include spa treatments, healthy eating/culinary events, fitness activities and adventures such as walking tours, hiking, paddling and yoga, inspirational outings and adventures in nature that clear or expand the mind, and educational programs that share ways to incorporate healthy habits into our everyday lives. With an increased global interest in social issues such as human rights, equality, and working conditions, conscious travellers were on the rise in 2019. More questions are being asked around social, political and environmental issues prior to deciding on where to visit. Travellers are seeking authentic experiences while also ensuring safety, regardless of their gender, ethnicity or sexual orientation. Conscious travelling also continues once you arrive at your destination. The goal is to connect with a place, community/people and to make your travels be just as fulfilling for others.

A third trend, perhaps among more educated travellers, is referred to as “Experience First”. More and more travellers are now attributing a higher value to experiences versus material possessions – making experiential travel another major trend for 2019! In an effort to escape mass travel and generic experiences, travellers are seeking authentic adventurous experiences that immerse them into their cultures and provide an element of personalization. There is a noticeable shift away from one-size-fits-all packaged tourism to one that is focused on creating lasting memories. This is particularly the case among some elements of European tourists. More and more travellers now want a personalized experience. Companies that want to succeed must anticipate these traveller needs, understand previous challenges, and proactively address these challenges using data and business intelligence.

Another trend is the growth of Culinary Travel. Basically, everyone is now interested in food and drink when they're travelling. For some travellers, the food and drink go beyond interest to a major factor that drives travel decisions. Not only are today's “foodies” more likely to base their travel decisions on culinary options, but they are looking for a different kind of culinary experience than in years past. People are now seeking a more immersive experience that allows them to get a sense of the local culture through its cuisine. Travellers no longer want to go to yet another chain restaurant, they want an authentic way to experience the local foods and local culture.

While it is subject to cyclical booms and busts due to factors such as recessions and pandemics, one of the biggest impacts on how people decide on and plan their vacation in the last decade or more has been from the growth of digital platforms and use of social media. The mass circulation of mobile devices, particularly cell phones and tablets led to a significantly less important role for travel agents, as people research and book their own holidays, particularly tourists under the age of 50. ⁶

As contemporary tourists are using social media such as the highly popular TikTok and Instagram applications more and more during the pre-trip, on-site experiences and feedback stages, these tools are increasingly guiding consumer behaviour in the travel industry and shaping tourists' perceptions, feelings, and experiences. Consequently, opinions and recommendations obtained through social media, especially video reviews that endorse tourism experiences and increase interest in a particular location, are becoming more critical in the holiday destination decision-making process confirm that social media reaches more people quicker than previous communication tools. ⁷

⁶ From 2006 to 2019 there were 192 articles published in top journals dealing with social media, advertising and hospitality, tourism and travel (HTT). For a comprehensive literature review see Chu et al, 2020.

⁷ Pop, Rebeka-Ana, et al. The impact of social media influencers on travel decisions: The role of trust in consumer decision journey. *Current Issues in Tourism*, March 2021, pp. 1-21.

4 Contribution of Tourism to Gross Domestic Product

A tourist generates economic activity in the local economy by stimulating local demand for goods and services, either directly (by buying goods and services) or indirectly (as when lodges pay wages to local households or source goods from local businesses, who in turn spend this income on locally-supplied goods and services). Without data, policymakers may have difficulty in justifying certain budgets to the industry. Taxpayers wish to know the data, too, in terms of the following:

- How big is the tourism sector?
- What is its % contribution to GDP?
- Is it larger than other industrial sectors?
- How many jobs are created?
- How much tax is generated?
- How much in wages is paid to workers?

A Tourism Satellite Account (TSA) provides an economic measure of the importance of tourism in terms of expenditures, GDP and employment for a given country. It integrates in a single format data about the supply and use of tourism-related goods and services, and it provides a summary measure of the contribution tourism makes to production and employment. It permits a comparison of tourism with other industries since the concepts and methods used are based on the System of National Accounts.

The TSA is an attempt to measure the size of economic activities or sectors which are not included in the established national accounts. The World Tourism Organization (UNWTO) says it is a “Set of definitions, classifications integrated into tables, organized in a logical, consistent way, which allows us to view the whole economic magnitude of tourism in both its aspects of demand and supply.” The TSA extends the Input-Output accounts in that they attempt to measure an economic activity (travel and tourism) undertaken by only a subset of purchasers (visitors) and involving only a subset of purchases (tourism demand). The TSA is based on the following standardized tables:

Table 1: Inbound tourism expenditure by products and classes of visitors
Table 2: Domestic tourism expenditure by products, classes of visitors and types of trips
Table 3: Outbound tourism expenditure by products and classes of visitors
Table 4: Internal tourism consumption by products
Table 5: Production accounts of tourism industries and other industries (at basic prices)
Table 6: Total domestic supply and internal tourism consumption (at purchasers' prices)
Table 7: Employment in the tourism industries
Table 8: Tourism gross fixed capital formation of tourism industries and other industries
Table 9: Tourism collective consumption by products and levels of government
Table 10: Non-monetary indicators

The original intent of the consultants was to obtain the relevant data from official sources in Eswatini to populate these tables. However, it was eventually revealed that it was only possible to obtain information for TSA Tables 1, 4 and 5 from the Central Statistics Office. And the Ministry of Labour agreed to compile Table 7. So, it is not at present feasible to do a TSA for Eswatini. Nevertheless, the available information is presented below. And in order to get a sense of the extent and scope of services related to the tourism sector, an inventory of accommodation facilities and of restaurants and bars was also developed. See Annex I and Annex II. These are current and accurate up to July 2022.

A necessary caveat regarding data in Eswatini is that there is little consistency in the data from different sources; and also lack of clarity in terms of how data is obtained (from surveys or estimates). So, some caution is required when interpreting data.

Table 2. Inbound tourism expenditure, by products and classes of visitors, 2020 (Emal.)

Products	Tourists (overnight visitors)	Excursionists (same-day)	Total visitors
Accommodation services for visitors	97,042,358		97,042,358
Food and beverage serving services	237,430,302	90,089,163	327,519,465
Road passenger transport services	217,374,882	90,373,955	307,748,837
Air passenger transport services	711,644		711,644
Cultural services		399,480	399,480
Sports and recreational A	75,693,039	4,841,462	80,534,501
TOTAL	628,252,225	185,704,060	813,956,285

Source: Central Statistics Office

Table 2 shows that in 2020, total expenditure by tourists amounted to almost 814 million emalangeni. (US\$58.1 million). This is not a proper reflection on the size of the tourism sector because of the effects of the COVID-19 pandemic since visitors declined by 72% in 2020 compared to 2019. And the same conclusion applies to Table 2 which shows production accounts in tourism industries.

Table 3. Production accounts of tourism industries, 2020 (million Emal.)

	Total output (basic prices)	Total consumption (purchaser prices)	Total gross value added (basic prices)
Accommodation services for visitors	327	134	193
Food and beverage serving services	618	433	185
Road passenger transport services	402	144	258
Air passenger transport	26	13	13
Travel agency & reservation services	51	32	19
Cultural services			
Sports and recreational services	125	39	86
Total	1,549	795	754

Source: Central Statistical Office

Table 3 shows the direct economic contribution by tourism sub-sectors in 2020. With a total of 1.5 billion emalangeni. It is a pity that there is no earlier reference point to get a better sense of the economic impact of the tourism sector.

Another major economic impact of tourism activities is through employment. The TSA Table 7 (T7) represents employment in the tourism industries. According to the TSA format, employment should be broken down by the number of establishments, jobs and employed persons for/in tourism characteristic industries. Jobs are broken down by status in employment (employee and self-employed) and each of these categories is further broken down by gender. In order to estimate the total employment in tourism, the consultants relied on data from the Ministry of Labour based on biennial labour market surveys. It was discovered that there is no time series of data and only statistics from 2016 and 2021 were made available. The information from the Ministry of Labour is reproduced in Table 4 and Table 5 below.

Table 4. Total Direct Employment in Tourism Sector in Eswatini, 2016

Industry Group/Economic Activity Group	Male	Female	Total
Urban and suburban passenger land transport	707	232	939
Other passenger land transport	3,979	2,769	6,748
Passenger air transport	0	164	164
Short term accommodation activities	400	822	1,222
Other accommodation	0	82	82
Beverage serving activities	0	340	340
Tour operator activities	73	0	73
Botanical & zoological gardens & nature reserves	0	147	147
Operation of sports facilities	76	85	161

Industry Group/Economic Activity Group	Male	Female	Total
Other amusement and recreation activities n.e.c.	0	120	120
Restaurants and mobile food service activities	1,223	1,688	2,911
Other food service activities	533	1,382	1,915
Total tourism-related employment	6,991	7,831	14,822
Total Employed Labour Force (2016)	144,455	136,732	281,187
Tourism employment as % of total - 5.2%			

Source: Ministry of Labour based on Labour Market surveys

Tables 4 and 5 show direct employment in the tourism sector in 2016 and 2021. This suggests that tourism accounted for 5.2% of the labour force in 2016 (14,822) and 5.4% in 2021 (13,164). However, there are several data gaps in both 2016 and 2021 so it is difficult to really estimate total employment in tourism. It is evident that there are men working in accommodation and beverage serving activities, and women in tour operator services and museum activities. Furthermore, it is unlikely that the Ministry of Labour surveys counted self-employed persons in the tourism sector. This therefore calls into question the reliability of the data which is supposed to be fairly accurate since it is done by household surveys. Instead, it appears that the figures may be estimates.

Table 5. Total Employment in Tourism Sector in Eswatini, 2021

Industry Group/Economic Activity Group	Male	Female	Total
Urban and suburban passenger land transport	498	0	498
Other passenger land transport	2,455	379	2,834
Short term accommodation activities	1,654	187	1,841
Other accommodation	0	220	220
Restaurants and mobile food service activities	2,339	2,780	5,119
Beverage serving activities	515	982	1,497
Tour operator activities	0	105	105
Museums activities and operation of historical sites and buildings	107	0	107
Botanical and zoological gardens and nature reserves activities	323	100	423
Gambling and betting activities	0	168	168
Activities of sports clubs	352	0	352
Total tourism-related employment	8,243	4,921	13,164
Total employed labour force in Eswatini (2021)	118,236	123,697	241,933
Tourism employment as % of total - 5.4 %			

Source: Ministry of Labour based on Labour Market surveys

Another broader approach to tourism-related employment in Eswatini is to also include the public sector employment focused on providing services to tourism operators and tourists and a percentage of the labour force employed in 15 other industry groups that feed into tourism. In this regard, according to ETA estimates, total employment in Eswatini relating to the tourism industry (directly and indirectly) accounted for about 30% of total employment in 2021 and 26% in 2019. But the percentages of employees from other sectors ascribed to tourism seem arbitrary, and in some instances, rather high. It may not be realistic to assume that tourism-related jobs account for 30% of total employment in Eswatini.

4.1 Contribution of the Accommodation Sector

Even the data on accommodation, particularly hotel occupancy rates, is difficult to digest since it seems that although Eswatini has a relatively modest number of rooms (in hotels, lodges, B&B's), there were very low occupancy rates published by the ETA for 2014-2020. While 2020 is understandable because of COVID-19, the other years seem rather low. (See Table 5). One wonders if a hotel business would be commercially viable or profitable at such low rates. Even in 2019 the average room occupancy rate was only 37%. However, several hoteliers on the main circuit (Ezulwini Valley) indicated that they recorded much higher occupancy rates 2017-19. So, it is not clear if the data are faulty, or they are skewed by very low occupancy rates in other accommodation establishments in other parts of the country.

Furthermore, the ETA reported that in 2019 there was a total of 3,293 rooms available with a total number of beds 6,644.⁸ So, it is not clear how the “rooms available” figure for 2019 in the CSO’s table is 714,293. (3,293 x 365 = 1,201,945).

Table 6. Accommodation Statistics

	2014	2015	2016	2017	2018	2019	2020
Number of facilities	137	140	138	157	157	164	176
Rooms 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
Room occupancy rate	44.7	43.4	48.9	51.2	41.0	37.0	23.8
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. Published in ETA, Research Annual Report 2020, p. 16

While a lack of data prevents a proper assessment of the contribution of the tourism sector to the economy, it is obvious that tourism provides a significant amount of employment which has a multiplier effect in the local economies. And operators also contribute to significant economic activity locally. For instance, in a survey of 24 tourism operators (in June 2022) it was found that they purchase goods and services from numerous other companies as follows:

Table 7. Suppliers used by tourism operators

Tourism operators	Number of suppliers
2	75 +
1	50
3	20-30
1	25
9	10-20
8	3-10

In conclusion, it was not possible to obtain a proper assessment of the contribution of the tourism sector to the Gross Domestic Product (GDP) of Eswatini. In this regard, it should be noted that a case for a Tourism Satellite Account was made in the National Tourism Strategy (2011) and the STA’s marketing plan. From recent research, it is evident that the relevant entities (Ministry of Labour, CSO, Central Bank) are currently unable to generate the data to develop a TSA for Eswatini. It is necessary for the relevant authorities and agencies to invest the necessary resources to collect the relevant data and conduct a full TSA for Eswatini.

According to the World Travel & Tourism Council (WTTC), the **direct** contribution of travel and tourism to Swaziland’s GDP in 2016 was US\$103.9 million or 2.8% of total GDP. The direct contribution measures total spending on travel and tourism by resident and non-residents, as well as governments, for business and leisure purposes (hotels, airlines, airports, travel agents, leisure and recreation services that deal directly with tourists). In 2016, the **total** contribution of travel and tourism to Swaziland’s GDP was estimated at US\$ 227.0 million or 6.1% of GDP.⁹ The total contribution includes the wider impacts of travel and tourism including T&T investment spending, government collective spending (tourism marketing, administration, resort area security services, etc.) and domestic purchases of goods and services related to tourists (food and fuel, cleaning services, IT services by travel agents, etc.).

⁸ ETA, Eswatini Tourism Research: Annual Report 2019, p. 49.

⁹ World Travel and Tourism Council, Travel and Tourism Economic Impact 2017 – Eswatini.

Tourism is the greatest multiplier in an economy because of the large cluster of other services and goods and manufacturing linked to it. Strong performance in this sector will have a positive economic impact across the country and should be an important element in any post-COVID recovery strategy.

5 Eswatini as a Tourism Destination

While it is a beautiful country and has great tourism potential, Eswatini was never seen as a competitive tourism destination except in terms of price. Table 8 shows the ranking of African countries in the Travel and Tourism Competitiveness Index 2019 which measures the set of factors and policies that enable the sustainable development of the travel and tourism sector, which contributes to the development and competitiveness of a country. Eswatini is ranked at 118 which is relatively better than many African countries but still quite far from Mauritius (54, the best) and South Africa (61) and a very poor ranking out of 140 countries. This suggests that much needs to be improved in Eswatini in order to enhance the tourism sector.

Table 8. Travel and Tourism Competitiveness Index 2019

Global Rank	Economy	Global Rank	Economy
54	Mauritius	122	Ethiopia
61	South Africa	123	Benin
62	Seychelles	124	Lesotho
81	Namibia	125	Malawi
82	Kenya	126	Guinea
88	Cape Verde	127	Mozambique
92	Botswana	128	Cameroon
95	Tanzania	129	Nigeria
106	Senegal	130	Mali
107	Rwanda	131	Sierra Leone
111	Gambia, The	132	Burkina Faso
112	Uganda	134	Angola
113	Zambia	135	Mauritania
114	Zimbabwe	136	Congo, DR
115	Ghana	137	Burundi
118	Eswatini	138	Liberia
119	Côte d'Ivoire	139	Chad

Table 9 provides the scores and ranking of Eswatini by the World Economic Forum based on a methodology that is applied to all 140 countries in its survey. It shows that Eswatini is not particularly impressive in many indicators. It ranks particularly poorly (low scores and rank of 100 or higher) compared to other countries in terms of ICT readiness, health & hygiene, human resources and labour market, air transport, international openness, tourist service infrastructure, and environmental sustainability. But the low rankings for natural and cultural resources (128), natural resources (117), and cultural resources and business travel (140) seem incorrect. These may be based on the old information that was available on Swaziland. However, Eswatini has significant natural resources of touristic interest which will be explored below. These were researched and catalogued by the consultants in this project and should be updated in all promotional material and descriptions of Eswatini.

What is significant from the indicators is the strong price competitiveness of Eswatini as a tourism destination (score of 6.1 and ranking of 11 out of 140 countries). This means that if efforts are made to address issues in other areas of tourism – training of staff, ICT, business environment, standards, etc., Eswatini should be able to attract more tourists and improve the tourism experience for visitors as well as the economic benefits for liSwatis.

Table 9. Eswatini's Tourism Competitiveness Indicators

Indicator	Score (out of 7)	Ranking (out of 140)
Business Environment	4.4	72
Safety & security	5.5	70
Health & hygiene	3.1	122
Human resources & labour market	3.8	121
ICT readiness	2.3	133
Prioritization of travel & tourism	4.6	77
Natural & cultural resources	1.6	128
International openness	2.7	102
Price competitiveness	6.1	11
Environmental sustainability	3.7	127
Air transport infrastructure	2.2	101
Ground transport & port infrastructure	3.1	80
Tourist service infrastructure	3.0	100
Natural resources	2.2	117
Cultural resources & business travel	1.0	140

Source: World Economic Forum, 2019

5.1 Standards and Service Quality

Standards and service quality are less than optimal or inconsistent in many tourism establishments in Eswatini. From a competitiveness angle, this is an issue for the major events organizers in Eswatini since standards and service in South African hotels and other facilities are of better quality compared to some local establishments. There are numerous anecdotal examples to illustrate this.

One foreigner observed that he is yet to find a restaurant in Eswatini in which a waiter knows how to pour a glass of wine properly or advise customers on wines. Recent visitors from South Africa staying at a popular resort (which is on a very special site, and looks exotic and beautiful on the Internet), were disappointed with various things in their rooms (showers not working properly, leaking hoses lying all over the property, etc.). And when one leaves the resort to walk, there is garbage strewn on the hillside, mainly liquor bottles that were exposed by a brush fire that cleared the land. There is a general lack of consciousness of environmental issues¹⁰ and things like litter although these are issues that tourists are quite conscious about nowadays. Before the Swazi Frontier mountain bike event, the organizers usually clean up the garbage along the route. The year in which that was not done, they received numerous comments from the participants about unsightly garbage in many places.

The service quality issue may be mainly due to inadequate training of personnel working in tourism businesses. There is need for a vocational tourism training institute or facility in Eswatini to ensure that staff in all types of establishments are trained properly in the various aspects of tourism services. Eswatini College of Technology offers a 3-year Diploma in Hospitality and Tourism Management; but there is limited vocational training for the hospitality sector in the country and most staff in tourism establishments have to be trained on the job. But some owners also lack the awareness and sensitivity that the hospitality service sector needs.

There may also be need for a whole-industry-whole-country approach to promote awareness of the relevant standards and values to be upheld in the tourism sector.

¹⁰ For instance, a professional taxi driver on call to a flagship hotel left his van with a diesel engine running directly in front of the hotel doorway while waiting for the passenger. And when he deposited the passenger at another hotel, he also left the van idling in the parking lot. This was in spite of a discussion along the way about the high price of fuel and the need to reduce vehicle pollution and carbon emissions.

6 Activities for Tourists in Eswatini

6.1 Overview of the Tourism Sector

The Box below indicates a summary inventory of the tourism sector in Eswatini. (A complete inventory is annexed to this report). It is evident that it is relatively small compared to neighbours such as South Africa and Botswana.¹¹ Therefore, in principle, it should not be very difficult to attract the level of tourists to pre-pandemic numbers.

- 199 accommodation establishments,¹² (occupancy for 6,509 persons) - *Plus camping sites*
- 105 restaurants - *Plus 58 fast food outlets*
- 14 art and craft centres
- 41 tour operators, travel agencies and tour guides
- 10 touristic transport providers
- 48 different types of attractions and activities
- 24 annual events

The current promotional material for Eswatini tourism is outdated and does not reflect the full scope or extent of activities that are available in the country. The tourism activities map is also not representative of the current situation. Based on research conducted by the consultants, the following is a complete list of the activities that are offered in Eswatini. Figure 1 shows their distribution across the country.

Recreational Activities Available for Tourists in Eswatini

- | | | |
|------------------------------|---------------------------|----------------------------------|
| 1. 4 x 4 Tours | 15. Fishing | 30. Multi-Day Hiking |
| 2. Arts & Craft Tours | 16. Game / Nature Reserve | 31. Museum |
| 3. Birding | 17. Game Drive | 32. Music Events |
| 4. Boating | 18. Golf | 33. Nature walks |
| 5. Botanical Garden | 19. Guided Bird walks | 34. Other Attraction |
| 6. Bush Trails | 20. Health Spa | 35. Protected Area |
| 7. Canopy Tours & Zip-lining | 21. Hiking | 36. Quad Biking |
| 8. Caving | 22. History Tours | 37. River Rafting |
| 9. Cinema | 23. Horseback Riding | 38. Rock Art / Bushman paintings |
| 10. Clay Pigeon shooting | 24. Hot Springs | 39. Swimming |
| 11. Climbing & Abseiling | 25. Hunting | 40. Tiger Fishing |
| 12. Cultural Dancing | 26. Kids Play Areas | 41. Traditional Food |
| 13. Cultural Events | 27. Motor biking | 42. Traditional Markets |
| 14. Cultural Village | 28. Mountain Biking | 43. Trail Running |
| | 29. Mountain Peak | |

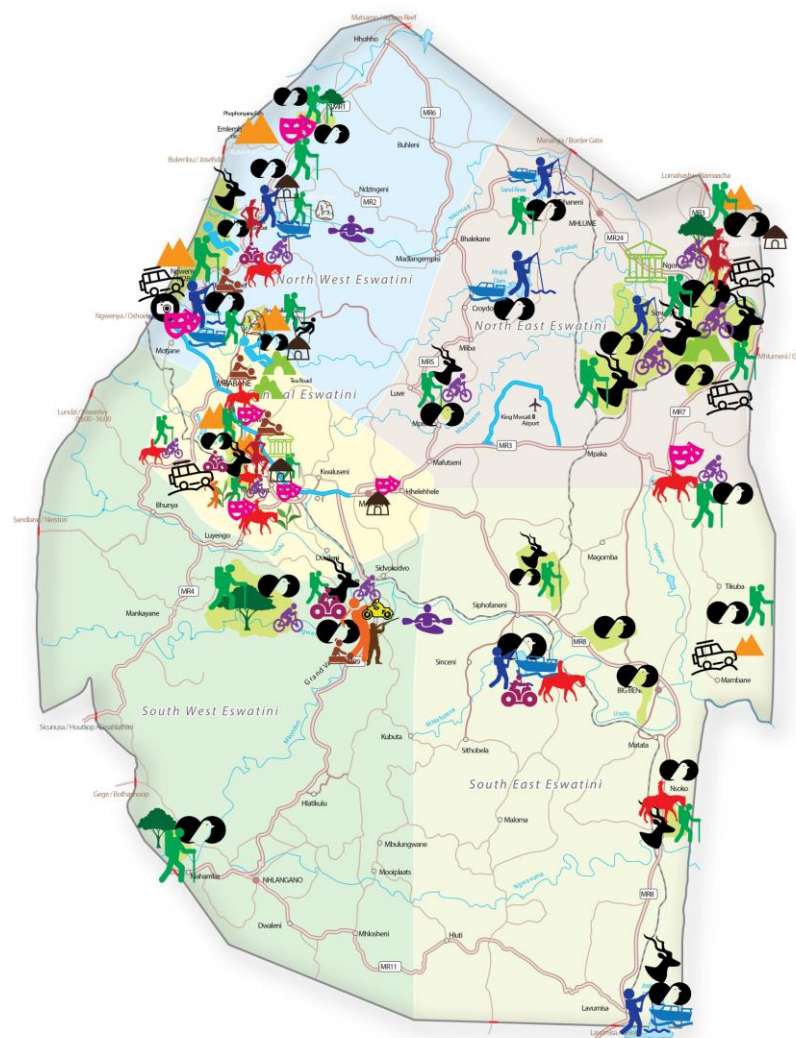
While the list is extensive, the problem is that the activities are poorly marketed or advertised and the packaging of different types of activities is not done. To make Eswatini more attractive to tour operators and independent tourists it is critical for tourism operators of all kinds to work together to present aggregated activities to appeal to tourists in various market segments and across them so that tourists (and tour operators) can see Eswatini as a place where one can happily spend 5-7 nights.

¹¹ In comparison, South Africa had about 69,600 hotel rooms in 2020 (Statista). And according to Business Botswana, in 2018 Botswana had 12,690 rooms with a capacity of 25,330 beds.

¹² This is not a total of companies. Some companies have different types of accommodations.

Figure 2. Tourism Activities Map of Eswatini

- 1  4 x 4 Tours
- 2  Arts and Craft
- 3  Birding
- 4  Boating
- 5  Botanical Garden
- 6  Canopy Tours and Zip-lining
- 7  Caving
- 8  Clay Pigeon shooting
- 9  Climbing and Abseiling
- 10  Cultural Dancing
- 11  Fishing
- 12  Game / Nature Reserve
- 13  Golf
- 14  Health Spa Treatments
- 15  Hiking
- 16  Cultural Village Tours
- 17  Horse Riding
- 18  Hunting
- 19  Motor biking
- 20  Mountain Biking
- 21  Mountain Peak
- 22  Museum
- 23  Other Attraction
- 24  Protected Area
- 25  Quad Biking
- 26  River Rafting
- 27  Rock Art
- 28  Game Drive



How we could sell
Eswatini

-  Central Eswatini
-  North West Eswatini
-  North East Eswatini
-  South East Eswatini
-  South West Eswatini

10

Very recent attempts by HOTAES and ETA to train tourism operators on the packaging of tourism experiences should be continued. But most important is the need for the whole tourism sector to come together and put together packages of activities to sell to DMCs and tour operators from South Africa and elsewhere for visits of several days. Given all the possible outdoor activities listed above – hiking, mountain biking, trail running, rafting, abseiling, birding, game drive, golfing, etc. – it should be possible to attract more tourists in various demographics and interest segments. The aim should be:

- (i) To entice tour operators based in South Africa to make their customers spend at least 3-4 nights in Eswatini; and
- (ii) To attract more independent tourists to the destination.

6.2 Natural Touristic Assets

Eswatini's endowment of biological riches is disproportionate to the country's size. With a land area of only 17,364 km² – a little smaller than the Kruger National Park in neighbouring South Africa – the country lies at the interface of four physiographic regions and exhibits a high diversity of ecosystem types that span montane grasslands, forests (montane, riparian and dry types), savanna-woodland mosaics (highland and lowland types), and a diversity of freshwater systems (such as wetlands, marshes, streams and rivers). These ecosystems are home to biodiversity of global and regional significance, including a diverse array of plant and animal species – a notable proportion of which are rare or threatened, especially in landscapes that are not formally protected or actively managed for conservation. The country exhibits one of the largest intact altitudinal gradients of natural ecosystems in Southern Africa and is the only place where this gradient occurs across a relatively short distance (about 200 kms).¹³

The consultants researched the natural touristic assets of Eswatini and discovered that several have not been included in tourism promotional materials before; and the protected areas have not been listed on the tourism map either or other promotional literature. In fact, it is practically impossible to get a list of all the protected areas in Eswatini from any government institution, including the National Trust Commission. All the protected areas have things of touristic interest – archaeology, birdwatching, hiking, wildlife, etc. The following is a list of the natural touristic assets in Eswatini as compiled in June/July 2022. Details on each can be found in Annex 3 and Appendix I to this report.

List of Natural Touristic Assets

- | | |
|--|---|
| 1. Songimvelo-Malolotja TFCA | 14. Malolotja Potholes |
| 2. Lubombo TFCA | 15. The Gap, eSicancweni |
| 3. Makhonjwa Mountain Range | 16. Hot springs |
| 4. Ngwenya Ridge | 17. 350 Bird species (9 threatened) |
| 5. Mdzimba Mountains | 18. Reptiles (Swazi thick-tailed rock gecko and Barberton girdled lizard) |
| 6. Nyonyane Mountain, Rock of Execution | 19. Unique fauna and flora (several threatened species) |
| 7. Mlembe Mountain Range | 20. Khabane Cave |
| 8. Sheba's Breast | 21. Siphiso Cave |
| 9. Kophola Mountains | 22. Stone Circles |
| 10. Sibebe Mountain Range and granite dome | 23. Nsangweni Rock Art |
| 11. Malolotja Falls | 24. Lion Cavern, Oldest Mine |
| 12. Mantenga Falls | |
| 13. Phophonyane Falls | |

It should be noted that Lubombo Transfrontier Conservation and Resource Area (TFCA) encompasses a complex system of mixed land-use areas, including conservation, agriculture and community land between Mozambique, South Africa and Eswatini, covering an area of over 10,000 sq. km. Lubombo Conservancy consists of 60,000 hectares, the largest conservation area in Eswatini

¹³ See UNDP (2021), p. 19.

and includes Shewula Nature Reserve, Hlane Royal National park, Mlawula game Reserve and Nkhalashane Siza Ranch.

In recent years, Eswatini has designated several protected areas and these are all repositories of various flora and fauna. They also increased the potential for nature tourism but they have not been properly documented and are not included in the official tourism map. It is important that these be included in all promotional literature on Eswatini. The following is a list of protected areas, game reserves and nature reserves with accommodation facilities in Eswatini.

According to the general understanding and regulations in Eswatini "Protected Area" (PA) is an umbrella term covering 5 types of protected areas but not all are based on official legal protection: National Park, Nature Reserve, Game Reserve, Flora Reserve and Other Effective Conservation Measure (OECM).

List of Game and Nature Reserves & Other Protected Areas

Game reserves and nature reserves with accommodation:

1. Dombeya Game Reserve
2. Hlane Royal National Park
3. KaMsholo Bushveld Safaris
4. Inyoni Yami Irrigation Scheme (YSIS) Game Reserve
5. Malolotja Nature Reserve
6. Mantenga Nature Reserve
7. Mbuluzi Game Reserve
8. Mhlosinga Game Reserve
9. Mkhaya Game Reserve
10. Mlawula Game Reserve
11. Mlilwane Wildlife Sanctuary
12. Nkonyeni Game Reserve

13. Phophonyane Nature Reserve
14. Royal Jozini Game Reserve
15. Wide Horizons Mountain Retreat (nature reserve)

Other protected areas with accommodation:

1. Hawane Nature Reserve
2. Mahamba Gorge
3. Mdzimba
4. Mhlumeni
5. Mvembili
6. Ngwempisi
7. Shewula
8. Sibebe

6.3 Tour Operators & Tourist Guides

While it is not a regulated activity but should be in order to ensure standards and quality, tour operators in Swaziland now offer a range of services for various types of activities from adventurous things like white-water rafting, abseiling and caving to hiking in the mountains. Most are small companies and some of the entities listed below may be tour guides rather than tour operators. Some have long been in existence and are well-known, reliable and professional. A few are start-ups from the pandemic period. The tour operator/tourist guide sub-sector should better organize themselves and develop standards and regulations for these tourism activities.

But in most hotels, it is still very difficult to find any information on things to do or tour guides or tour operators.¹⁴ This is a systemic information deficit that must be addressed, especially since most of the tourism operators in Eswatini have poor or sub-optimal Internet or online presence. This is an important issue because most tourists and all independent tourists look for information on destinations online.

List of Tour Operators/Guides in Eswatini

- | | |
|--|---|
| <ol style="list-style-type: none"> 1. All Out Africa 2. Amahle Travel & Tours 3. Big Sky Travel and Tours 4. Bumhi Safaris | <ol style="list-style-type: none"> 5. Bush Travel Tours 6. Calf's Tours 7. Chasing Horizons 8. Dust & Boots |
|--|---|

¹⁴ A case in point is the Hilton Garden Inn, a flagship new business hotel which, in June 2022, had absolutely no information brochures on things to do in or around Mbabane or in Eswatini in general. And staff could not advise guests on this either.

- | | |
|-------------------------------|------------------------------|
| 9. Eagles Unite | 22. Pack 2 Go Travel & Tours |
| 10. Ekhaya Cultural Tours | 23. Sandile Tours |
| 11. Exclusive Shuttle & Tours | 24. Skyworld Travel & Tours |
| 12. Future Travel | 25. Swazi Trails |
| 13. Gifting Tours | 26. Swazi Travel Trade |
| 14. Izinyane LeNsele | 27. Taman Tours |
| 15. King's Travel Africa | 28. The Emperors Travel |
| 16. Lucky Tours | 29. Time Travel |
| 17. M & M Tours | 30. Total Experience Tours |
| 18. M Brothers Travel & Tours | 31. Tour Eswatini |
| 19. Mduduzi Dlamini | 32. Tsheola /Dinare |
| 20. Melula Travel | 33. Vakasha Tours |
| 21. Nolu Travel & Tours | 34. Vaya Trails |

6.4 Annual Events in Eswatini

Regional tourism arrivals patterns in Eswatini seem to roughly follow the South African (school) holiday calendar; and international tourists travel in July and August.¹⁵ This is a useful mix which practically speaking should allow for tourist flow throughout the year. In order to also attract regional tourists the calendar or schedule of events should be spread out so that there is a major event in every month. This will attract South African tourists mainly, but also others from Mozambique and Zimbabwe, etc. There are 24 major events in Eswatini annually as follows below, but perhaps the timing of some of the ones that potentially can attract global participants can be re-considered. There is very little during July and August when Europeans and North and South Americans generally travel but a lot of events in September.

Annual Events in Eswatini

1. Resolution Run (Big Game Parks) – January
2. Marula Festival - Buhleni Royal Residence - February
3. Marula Festival - Hlane Royal Residence – March
4. Mahamba Gorge Hike - April
5. Ngwenya Glass MTB and Trail Run - May
6. MTN Bushfire - May 26-28
7. Border 2 Border Cycling Race – June
8. The Epic Gig (Rap music festival in Malkerns) - June
9. Eswatini's biggest braai – July
10. Mbuluzi Trail Run – July
11. Mlawula Magadzavane Challenge – July/August
12. Sibebe Survivor Challenge – August 7
13. Galp Classic Car Rally – August 5-9
14. Umhlanga Reed Dance Festival - September
15. Swazi Rally – September 2-4
16. Imvelo MTB Race – September 3 (usually in June)
17. Kings Cup Golf Tournament – September
18. Hipnotic Hip Hop festival - September
19. Swazi 3 Reserves MTB Race - September
20. Eswatini International Trade Fair - September
21. Luju Food and Lifestyle festival – End August/early September
22. Mlawula Camp Fire Festival – October 28-30
23. Swazi Frontier MTB race - October
24. Incwala Festival – December

The September calendar is busy because of the spring weather. But if the low occupancy rates discussed above are accurate, then perhaps the introduction of other competitive sporting events in July and August

¹⁵ Monthly arrivals data from 2015-2019 show peaks in April, July-August, and December.

will help attract more visitors. Tourism stakeholders have pointed out that most of the events were (or still are) focused on the local market. However, many of them seem to have the potential to at least attract South Africans who are next door, and perhaps tourists from Mozambique and Botswana. Strategically speaking, it would be useful to have events better spread around the year to be able to attract regional visitors in greater numbers.

6.5 Meetings and Conventions

There is one other segment of the tourism market but with which Eswatini is not associated – MICE – (Meetings, Incentives, Conferences and Exhibitions). Currently, most conferences are local in nature or involve South Africans on team building or corporate events in Eswatini. But this is a very limited market.

The International Convention Centre was expected to consist of a 45,000 m² complex including large scale conference, exhibition, banqueting and dining spaces. In 2013 the *Swazi Observer* reported that the facility will be to international standards with a Swazi theme, able to handle up to 4,500 delegates and will include a trade centre for “high-value exhibitions”. It was also supposed to feature a secure chamber room to take 53 heads of state, a 3,500-seat banquet hall, restaurants, a 1,500-seat theatre, and special holding rooms for VVIPs. A 500-room five star hotel will be linked to the convention centre.

Considering historical tourism and conference traffic to Eswatini, a 500-room luxury hotel is not economically viable. And certainly not a 1,500-seat theatre or a 3,500-seat banquet hall. Furthermore, since then, the Lugogo Sun and Royal Swazi closed in the pandemic period. If Eswatini is able to bring large scale conventions to Ezulwini, it will be rare, marquee events like heads of government summits. It is unrealistic to expect the MICE sector to suddenly boom in Eswatini.

Furthermore, given the problems in getting to Eswatini by air, it is unlikely that the convention centre will be able to generate MICE business from further away. Conference infrastructure in South Africa is good, long established and has a good reputation. The only possible MICE market for Eswatini might be official regional meetings such as SADC; or COMESA, or some company-specific meetings from South Africa for a change of scenery. Furthermore, the Convention Centre has been under construction for several years now and there is little reliable information on the cost or financing or when it will be completed; or whether the original plans have been scaled back. If it is covered by taxpayers and at great cost, one hopes that it can begin operating on a commercially viable basis at some point. But if it does, it is likely that it may take away MICE business from current hoteliers in the Ezulwini valley, certainly from government ministries and agencies.

Before the Convention Centre is completed, it will be necessary for the Government of Eswatini to lobby internationally and regionally for big events in order to develop interest in, and promote or market the facility.

6.6 Volunteer Tourism

There is a small but increasing element in visitors that are considered volunteer tourism. Data on volunteer tourism groups is not available, but based on discussions with groups that facilitate volunteers, they tend to stay for an average of 6 weeks. While they do not stay in upmarket hotels, their long stay means that their spend in the local economy would be significantly much more than most tourists. They also purchase materials from hardware stores, pay for accommodation, spend in supermarkets, restaurants, among other places.

Given the fact that Eswatini is a very poor country, the tangible support that volunteer groups provide in terms of repairs to schools, churches, etc., and in some instances the construction of homes, they add value to the economy that can never be measured but is important at the micro level. Therefore, volunteer tourism should be encouraged. The main DMC for volunteer tourism in Eswatini is Out of Africa which is well-known and established. But there are opportunities in this sector which is re-emerging after the pandemic. For instance, a small UK company (Sense Earth) currently has a volunteer group in Eswatini consisting of 63 students. Their 22-night schedule includes the following in July/August:

2 nights in Mlilwane,
11 nights on a project,
4 nights on safari and doing an overnight trail in Hlane,
3 nights on a conservation project in Mbuluzi,
2 nights at a backpacker lodge doing activities such as horseback riding and the canopy tour.

Current projects are funding and building: (i) a staff room for Mhlumeni high School; (ii) building rooms for an Old Peoples Home in Section 19; (iii) building staff accommodation in Mlindzini High School.

Volunteer tourists may be only a small part of visitors to Eswatini but they make significant impact at the local level. However, there are some policy measures that negatively impact this type of foreign visitor as follows:

- a fixed rate bed levy which is effectively a special extra tax on tourism and represents a relatively high proportion for cheap long stays compared with expensive short stays;
- a 30-day standard tourism visa on entry requiring a visit to Home Affairs to extend for a further 60 days.

Policymakers should try to improve the business environment for all kinds of tourism in Eswatini.

7 Impact of Recent Domestic Political Issues

While in the past, Eswatini was rated highly in terms of the safety of tourists (compared to South Africa, for instance), more recently, the civil unrest and outbursts of demonstrations and violence and fires etc., in 2021, have resulted in travel advisory warnings from some key European markets. A survey of travel advisories on government websites on July 5, 2022 revealed the following recommendations:

France, Germany, Italy, Ireland - Avoid non-essential travel.

United States - Exercise increased caution.

Canada - Exercise a high degree of caution in Eswatini due to the risk of civil unrest.

Australia - Exercise a high degree of caution in Eswatini due to the risk of civil unrest.

The Netherlands - Yellow: beware, there are risks.

And the United Kingdom authorities, while not advising against travel to Eswatini cautions as follows:

Protests and demonstrations across Eswatini have reduced but could resume at any time.

Travel within Eswatini is possible, but you should be aware that road blocks or unexpected protests/road closures could occur. You should continue to avoid protests, demonstrations, or marches. Stay alert for signs of disturbances.

Similarly, Portugal recommends: "In the context of recent demonstrations and protests in different areas of the country, some of which have degenerated into violence, caution is advised when travelling to Eswatini."

These travel warnings do not augur well for the immediate future or the short term regarding the return of traditional European tourists to Eswatini compared to pre-pandemic levels. This will particularly affect the tour operator business due to insurance and safety concerns. And we should recall that European tourist numbers were already on the decline before COVID-19.

Incidentally, the best way to address the civil unrest issue in Eswatini is to reduce the extremely high unemployment rate among youths. Growth of the tourism and related sectors can generate new jobs faster than in manufacturing or agriculture. But there needs to be a concerted effort to facilitate and stimulate this.

8 Overview of Historical Visitor Trends

Table 10 clearly indicates that less than 2% of visitors to Eswatini arrive by air and this figure has not improved in the past 14 years. (See Annex IV for the detailed statistics). In fact, it is well-known that most international tourists (non-African) visit the country in a sort of drive-through visit from South Africa. Some South African-based tour operators have indicated that the country is too small to attract long-haul tourists directly. Coupled with the fact that there are no direct flights to Eswatini, it is unlikely that any destination management company (DMC) or tour operator will promote it as a sole destination. As one tour operator in South Africa who handles Norwegian and northern European tourists pointed out:

To be honest with you we have never had clients do Eswatini by itself. It is a little-known country and we would recommend you market it as an add-on to South or Southern Africa. Eswatini is a beautiful country with tremendous culture and lovely people and for us it is not hard to sell a few days added to a South African tour. We have not had any travellers at all during the pandemic but our first little group travelling in November 2022 is visiting Eswatini, but just for 1 night. A lot of our tours are about 8 to 10 nights and they need to visit many places.

Although there are 13 border posts, most tourists enter at the Ngwenya post (32% on average over 2015-2020) because it is on the corridor with the supply chain of tourists from South Africa. Most outbound visitors also leave through that border post as well. (See Annex IV for details).

Table 10. Visitor Arrivals by Air Compared to Total Arrivals in Eswatini.

	2007	2010	2012	2014	2015
Airport	2,713	25,184	22,720	16,186	19,902
Total Arrivals	1,230,091	1,342,533	1,278,497	1,324,621	1,255,901
Air as % of Total Arrivals	2.2	1.9	1.8	1.2	1.6
	2016	2017	2018	2019	2020
Airport	20,381	20,095	19,519	19,030	3,653
Total Arrivals	1,278,587	1,342,641	1,277,254	1,225,520	345,343
Air as % of Total Arrivals	1.6	1.5	1.5	1.6	1.0

Source: Eswatini Tourism Authority (various reports).

The period of stay of international tourists in Eswatini is also very short. Table 11 shows that the vast majority of visitors to Eswatini stay for less than 3 nights. And most tourists stay for only 1 night, typically, as they return to South Africa from Kruger Park or other region. This is in stark contrast to South Africa where international tourists stayed an average of 11.7 nights in 2018 and 2019.¹⁶

Table 11. Arrivals in Eswatini by Length of Stay

Length of stay	2014	2015	2016	2017	2018	2019
Less than 1 night	386,026	382,557	332,019	422,450	495,574	546,162
1 night	343,370	267,077	309,224	358,912	289,936	187,361
2 nights	324,311	255,283	279,232	273,059	256,728	237,187
3 nights	118,137	143,981	148,764	129,120	114,953	128,358
4 nights	51,581	64,128	58,636	56,213	40,872	43,494
5 nights	27,076	40,541	34,791	27,596	19,159	19,553
6 nights	13,614	20,147	25,194	16,523	15,327	14,280
7 nights	11,647	12,776	19,195	12,691	8,941	9,435
8-10 nights	12,857	19,779	24,744	14,309	11,495	8,679
11-14 nights	13,160	17,690	18,895	9,454	8,941	11,750
15-29 nights	14,219	15,356	14,396	10,817	7,664	8,390

Source: Eswatini Tourism Authority

¹⁶ See South African Tourism, Tourism Performance Report (2018, 2019).

Table 12. Total Arrivals in Eswatini by Country of Origin

	2007	2014	2015	2016	2017	2018	2019	2020	2021
Total Visitors	1,298,803	1,324,621	1,255,901	1,278,587	1,342,641	1,277,253	1,225,520	345,348	210,705
Africa Total	1,075,005	1,177,815	1,104,525	1,110,907	1,156,335	1,116,187	1,087,705	315,233	196,755
South Africa	800,113	856,492	810,249	814,220	850,221	832,276	856,095	238,324	147,737
North & South America		22685	23416	24210	25636	22809	21093	4,225	2184
Middle East		1126	1253	1519	1594	1473	1386	113	272
Asia & Australia		22688	23147	28968	29119	25215	24877	2,874	6207
Europe	117,168	100,308	103,559	112,974	129,955	111,569	90,460	412	5289
African % of total visitors	82.8	88.9	87.9	86.9	86.1	87.4	88.8	91.3	93.4
South African % of total visitors	61.6	64.6	64.5	63.7	63.3	65.2	69.9	70.0	70.1
European % of total visitors	9.0	7.6	8.2	8.8	9.7	8.7	7.4	1.1	2.5
Non-African % of total visitors	17.2	11.1	12.1	13.1	13.9	12.6	11.2	8.7	6.6

Table 12 shows that international (non-African) visitors to Eswatini have always been a small percentage of tourists. In fact, non-African visitors as a percentage of total visitors declined from a high of 17.2% in 2007 to only 11.2% in 2019. The pandemic then almost eliminated such tourists. This means that Eswatini was never able to meet the goal in its previous tourism strategy (2011) of increasing long-haul visitors to the country. However, another ambitious target was announced in July 2022 by the Minister of Tourism - the aim is to have 2 million arrivals and 2 billion emalangeni in revenue from tourists in 2025. But given historical trends, domestic political issues, cost and availability of long-haul flights to Johannesburg, and post-pandemic travel trends, this is highly unrealistic.

8.1 European Market

Europe is the closest long-haul tourism source market for Eswatini. Visitor exit survey data published by the Eswatini Tourism Authority (ETA, 2019) show that the vast majority of Europeans visitors are on holiday (Germans, 87%; France, 91%, Netherlands, 88%, UK, 60% - in 2019) while regional visitors are mainly visiting friends or relatives (VFRs) or on business trips/transiting. But European visitors as a percentage of total visitors averaged about only 8-9% from 2007 to 2019. Table 13 also demonstrates that total European visitors declined from a peak in 2017 of almost 130,000 to 90,461 in 2019 (30.4%).

It is not clear what exactly accounted for the dramatic decline in 2019; but some tourism operators point to the introduction of new requirements for children travelling through South African ports of entry (unabridged birth certificates, parental consent affidavits) by South Africa. Since almost all tourists come via South Africa, it is likely that this was a major factor, at least for long-haul family visitors. However, the regulations were introduced in 2015, so it is unlikely that it took almost four years for the negative effects on travellers to be felt. There may be other factors but no information is available on this issue. Furthermore, South Africa reported a 1.8% increase in total tourist arrivals in 2018 and only a 3.8% decrease in European arrivals in 2019.¹⁷ So, it does not appear that entry regulations caused a problem in South Africa, and hence, the same applies to Eswatini.

A further concern is the fact that non-Africans (rest of the world) as a percentage of total visitors to Eswatini declined from 17.2% in 2007 to only 11.2% in 2019. This is almost a secular, rather than cyclical decline in international tourists. And if as South African Tourism reports, European visitors are the biggest spenders of all tourists, then it is important to attract more international tourists to Eswatini.

Table 13. European Arrivals in Eswatini by Country of Origin

	2007	2014	2015	2016	2017	2018	2019
Total Europe	117,168	100,308	103,559	112,974	129,955	111,569	90,461
Belgium		4524	4909	5588	6529	6491	5646
France	15,680	14152	19360	21253	32809	26162	21091
Germany	24,749	21669	21510	22895	23981	22622	16400
Italy		3605	3277	3455	3682	3303	2976
Netherlands	19,795	17874	17414	20750	24150	19299	16389
Norway		946	929	766	624	495	498
Portugal		6720	6047	6610	5657	4264	3142
Sweden		2115	2167	2233	2008	1622	1164
Switzerland		3307	3678	3452	3516	3344	2735
United Kingdom	21,608	15813	14646	15503	16069	13855	11285
Other Europe		9583	9622	10469	10938	10083	9134

Source: Eswatini Tourism Authority

¹⁷ https://live.southafrica.net/media/272674/tourism-performance-report-2018_final.pdf?downloadId=281068
<https://live.southafrica.net/media/276075/final-tourism-performance-report-october-december-2019-1.pdf?downloadId=326956>

But the greatest concern is that long-haul tourist numbers in Eswatini had already declined significantly even before the COVID-19 pandemic. Something revolutionary may need to be done to re-activate interest in the Liswati market.

The main “suppliers” of European tourists to Eswatini seem to be:

France – Akilanga, African Eagle, Go Tourism, Private Safaris, Kuoni.
The Netherlands – Fairfield Tours, AAA, Highline – these two are direct competitors, Highline was Djoser and AAA Baobab. AAA is very big on TUI and has 2 other large suppliers - Nomad, Tourvest.
Belgium – Live the Journey (Evolve).
Germany – Fairfield (Fox), Ilanga Travel, Studiosus, Absolut Tours, Tourvest, Jenman Safaris, Amazing Africa, Egoli, Go Vacations, Terra Nova.
Sweden/Norway – Syd Afrika Resor.

African Travel Concept (ATC) deals with TUI and most western European countries. Thompsons Holidays sends mainly Germans, Dutch and French tourists to Eswatini. Most of the bigger accommodations tend to get the bulk of their international tourists from DMCs/tour operators and about a quarter of guest from online travel entities and direct bookings.

The tour operators/DMCs have set categories of holidays – Adventure, African safari, Self-drive, Specialized tours, Family, Beach & Safari. Eswatini can fit into most of these but all the DMCs and tour operators seem convinced that Eswatini is too small a place for serious tours. So, perhaps the best practical option is to differentiate the Siswati products from the rest of the region. For that, it requires some creative thinking and packaging by tourism operators in Eswatini.

The international tourist supply chain is really large. So, it is best to consider what the country has to offer and match that with the operators that bring the most economic value to Eswatini. For example, Akilanga, Go Tourism etc., are 'mass tourism' and go in-and-out using very competitive DBB (dinner, bed, breakfast) rates. So they fill beds but bring little to the local economy. Their rates are low, and they block-book for the year so they take bed space and the smaller operators sometimes cannot find availability. These larger groups only give their rooming list a month before (sometimes less) and that could end up being even half what they block-booked.

Eswatini is not being considered as a destination (as is evident from the list of DMCs in Annex V). Most of the DMCs do not have Eswatini listed, yet their tours use Eswatini. This emphasises the fact that Eswatini is not a destination they sell, but a thoroughfare for the route they use for their South African tours. So more effort has to be made to get these operators to list Eswatini in their programs. Maybe HOTAES or ETA need to contact some of them to find out why the country is not listed, yet used; and what they would require to be listed on their website. (Some operators charge fees to appear in their brochure, maybe it is the same for their website).

When considering tour operators maybe it would be better to focus on smaller, more personalised agents (in keeping with the nature of Eswatini) and then the direct market too. This would mean adjusting the type of travel shows and focusing on more online marketing, and only exclusive print media.

8.2 Tourism Spend in Eswatini

An attempt was made to ascertain which type of visitor provides the greatest value added to Eswatini (tourism spend) but there is inadequate data for this analysis. South African Tourism reports indicate that European tourists spend more than all other tourists; and tourists spend most on shopping and then restaurants.¹⁸ However, the tourism-related merchandising element in Eswatini is somewhat under-developed. For instance, souvenir T-shirts which is a massive retail product globally, is lacking in Eswatini. And there is no real shopping at the international airport or at borders.¹⁹ There is some retail in

¹⁸ South African Tourism, International Tourist Spend in South Africa: January-December 2019.

¹⁹ Compare for instance the number of commercial retail shops at Johannesburg airport selling mainly South African made products of all kinds.

craft outlets and places such as Swazi Candles and Ngwenya Glass,²⁰ and souvenir and craft stores in Malkerns; but generally speaking, there is little souvenir-related goods in malls and shopping centres. It is also not clear whether tourists ever get to malls in Mbabane or Manzini. Mozambicans apparently shop in Eswatini and apparently can be very significant spenders, but there is no data on this segment. And the completion of the new highway from Maputo to Cosy Bay in South Africa means that Mozambicans can now go to shop in South Africa rather than Eswatini; so, it is expected that less visitors will arrive from Mozambique. Apparently, the journey by road from Maputo to Nelspruit now takes about 2 hours but the journey from Maputo to Mbabane (which is a similar distance) can take up to 4 hours due to road conditions.

The ETA data indicate that European tourists spend a night on average but generally speaking, people travelling in tour groups spend little in the local economy as everything is paid for in all-inclusive packages from their home base. So, it is unclear to what extent Europeans spend in Eswatini. It is highly likely that South African visitors who take weekend trips a couple times a year in Eswatini contribute much more to the local economy. South African tourism officials report consistently that European tourists spend the most there but they also stay much longer. The model is different when Europeans visit Eswatini in tour groups. It is in the interest of Eswatini tourism to try to attract independent European travellers (families) who tend to stay longer than the tour group travellers.

²⁰ In fact, Ngwenya Glass may receive the greatest number of tourists, perhaps because it is located on the way to the border with South Africa and a good marketing strategy.

9 Prognosis for the Immediate Future

With national inflation rates increasing dramatically in recent months across Europe, cheaper tourism-related products and services have allowed many European travellers to satisfy their desire to holiday abroad while ensuring they can make ends meet at home. Reports of packed airports across Europe continue, demonstrating that the pandemic-induced demand for international travel is still present, even with inflation squeezing levels of disposable income. However, the Russian war in Ukraine and resulting energy crisis will most likely mean that less Europeans will travel far this year or next. Inflation concerns in North America are also affecting consumer demand. Also, many airlines have reduced their flight schedules and prices are significantly higher than pre-pandemic levels. For instance, British Airways only has one daily flight from Heathrow to Johannesburg now. And KLM's flight from Amsterdam arrives too late at night to connect to regional carriers to go to places like Eswatini or Botswana. Emirates has a flight from Brussels to Joburg via Dubai but the outbound from Dubai is at 4.00 a.m., not particularly appealing to anyone.

As airports, airlines and various other elements of the transport supply chain adjust to post-pandemic circumstances, airline ticket prices may eventually stabilise at more affordable levels. But for this year at least, and perhaps 2023, long-haul ticket prices will remain high. This will reduce demand for travel to Southern Africa in general, with implications for Eswatini.

Eswatini tourism operators will therefore have to focus strongly on the regional market for the next 2-3 years. And given the persistent trends, it also appears that tourism operators would be better off concentrating on regional tourism and apply scarce resources in greater marketing efforts to attract more tourists from Mozambique, South Africa, Zimbabwe and other African countries. But at the same time, it is necessary to significantly ramp up the online advertising of Eswatini to attract tourists from the rest of the world.

10 Actions Recommended for a Tourism Strategy

1) Develop a modified strategy for attracting tourists

In light of the circumstances in the global tourism market and the structural problems faced by the tourism sector in Eswatini, it is recommended that tourism stakeholders undertake the following three-pronged approach for the next 2-3 years and re-evaluate its effectiveness or success at the end of the period:

- (i) focus more on attracting new regional travellers;
- (ii) employ a very aggressive online marketing strategy in all possible media (social media mainly) to attract itinerant travellers (FITs) from the rest of the world; and
- (iii) develop greater linkages with ground handlers & TOs in SA to help drive more short trip visitors to Eswatini (holidays, weekend trips, golfing, sport events, etc.). As the Norwegian agent said, the country is too small to attract people directly from long haul destinations. This is a structural problem. Swazi operators will have to try to make themselves more attractive to the DMCs and tour operators who want to fill a day or two. But Lugogo Sun and Royal Swazi which fit the profiles for big tour operator brands are no longer in business. But things have to be put in place for when the two properties come on stream again.

The one-night international visitor from South Africa to Eswatini is a bit like cruise visitors to islands. It only makes sense if you get a LOT of them since the per unit spend is low. But given the current global situation, (war in Ukraine, inflation, energy crisis) long-haul travellers will remain low for some time, in spite of pent-up demand due to the Covid-19 pandemic. So, in the meantime, the independent, smaller hotels and B&B's are the ones who might benefit in the immediate post-pandemic period. It should be noted that in 2019, 31% of Mozambicans and 27% of South African visitors were on holiday in Eswatini. And whilst most international tourists who pass through Eswatini from South Africa spend only a night or two at most, regional visitors who come from South Africa for weekend trips such as golf holidays or sporting events like cycling tend to spend more nights and many are repeat visitors.

It is important to focus on regional travellers because they are the abundant catchment, and most are likely to be repeat visitors. In fact, the 2019 survey by ETA revealed that:

Over two-thirds of travellers to the country were on a repeat visit, these mainly comprising of regional travellers from South Africa (92%), Mozambique (98%), Botswana (42% and Malawi (48). The remaining 31% were first time visitors from overseas markets.²¹

Furthermore, there are also four regional cities within easy reach as follows:

- Gauteng is 350 km to the closest border, with a population of 6 million.
- Mbombela is 100 km to the closest border) with a population of 60,000.
- Durban is 360 km to the closest border with a population of 3 million.
- Maputo is 100 km to the closest border with a population of 1 million.

Regional travellers tend to be more price sensitive and it is clear from the WTTC data that Eswatini is more competitive in price than South African tourism establishments in general. And anecdotal reports from tourism stakeholders indicate that regional travellers are less fastidious and demanding about accommodation standards than long-haul tourists. And standards and service quality are still challenging issues for various tourism operators in Eswatini. Furthermore, if RENAC manages to get flights from Zimbabwe later this year, it could broaden the tourism catchment market.

2) Rebrand the image of Eswatini as a tourism destination

Since the country is small and does not have a “wow factor” that draws international attention, it is important to focus strategically on its main attributes and things that differentiate it from other tourist destinations. Small size is not necessarily a disadvantage, it can be considered cosy, and a place in which you can get a lot done without travelling long distances. Eswatini may be perfect for a week's vacation if the tourism sector can get together to package the different activities appropriately. And it may

²¹ Eswatini Tourism Research Annual Report 2019, p. 18.

be wise to discuss with operators in Mozambique and South Africa approaches to a joint holiday with one week there and one in Eswatini.

Given its natural assets and topography, biodiversity, nature reserves, game reserves, bird life and scenic, montane environment, it would be best to brand and market the country as a destination for Active Tourism that promotes **Healthy Lifestyle, Healthy Living**. This will entail outdoor activities like hiking, trail running, cycling, etc. that should be promoted to both global and regional audiences. The old slogan – Eswatini: A Royal Experience does not resonate with anyone; and certainly not with young travellers.

3) Redistribute annual events across the tourism calendar

Section 6 above discussed the numerous annual events that take place in Eswatini. However, there is not enough distribution across the year, and most are scheduled in September. Event organisers explained that the events did not originate as tourism activities, but were locally focused; and the timing is appropriate for weather reasons. However, most of the events can appeal to regional and international travellers. And for tourists from temperate countries, winter in Eswatini or Southern Africa is pretty mild. So, the country should see and present itself as a year-round destination. For instance, the cycling events would appeal to the thousands of over-zealous cycle enthusiasts in Belgium and the Netherlands and some parts of France and Germany.²² But the dates for the events are not fixed long enough in advance and most are not during the summer holidays or European or North American travellers. If the tourism industry could collaborate and brand the destination appropriately as Active Tourism, it will be normal to have cycling, MTB, trail running events year-round. In fact, all the cycling events should be advertised in relevant cycling channels in Belgium and the Netherlands in particular. It is common for cycling clubs in these countries to do trips overseas in various competitions, both professional and amateur.

4) Design and implement a campaign to promote Service Excellence in Tourism

In order to address the problem of service quality in Eswatini it would be very useful to design and carry out a national campaign on Service Excellence in Tourism on social media, radio & television; and provide training on service quality. It should cover all areas of service – frontline staff at hotels, lodges, B&B, transport personnel, tour operators, tour guides, restaurants, etc. And it should not only be targeted to employees in tourism establishments but also owners of tourism businesses. Apparently, numerous people that have invested in hotels and other accommodation facilities come from other (industrial) sectors. (For instance, some construction companies have invested in hotels). The owners of such establishments have no experience in tourism and are not sensitive to what foreign tourists expect. They need to be exposed to service standards in hospitality too.

A sub-set of this campaign should include an element on keeping Eswatini beautiful to address the issue of litter or garbage. In the tourism sector it could be branded with the slogan – Leave nothing but your footprints!

5) Improve communication about tourism activities & current events

‘What is there to do?’ is a central focus of tourists planning a holiday. This needs to be addressed clearly, comprehensively and actively via online channels. To this end, a ‘What’s on in Eswatini’ website or page or portal on HOTAES site should be developed as well as a comprehensive calendar added to the HOTAES & ETA’s website – readily linked from the home page – and including the development of a process for event organizers to add their own events to the calendar.²³ Events should be highlighted on the ETA’s social media channels. The events calendar should be advertised and actively promoted so that it becomes the go-to place to find out what’s happening. And it should include everything – tourism, sports, music, dance, etc. taking place in Eswatini. But dates for annual events should typically be announced at least 6 months in advance.

²² Some 48% of the Belgian population use bicycles, Japan is at 57%, Finland 60%, Germany 76% and the Netherlands 99%.

²³ The official Eswatini Tourism website has a calendar but it is generic and not current. Many events are also missing.

Develop an online magazine or guide similar to This is Botswana Guide – (<http://hatab.bw/index.php/about-botswana/this-is-botswana-guide.html>). It can be funded from sponsorship and/or advertising.

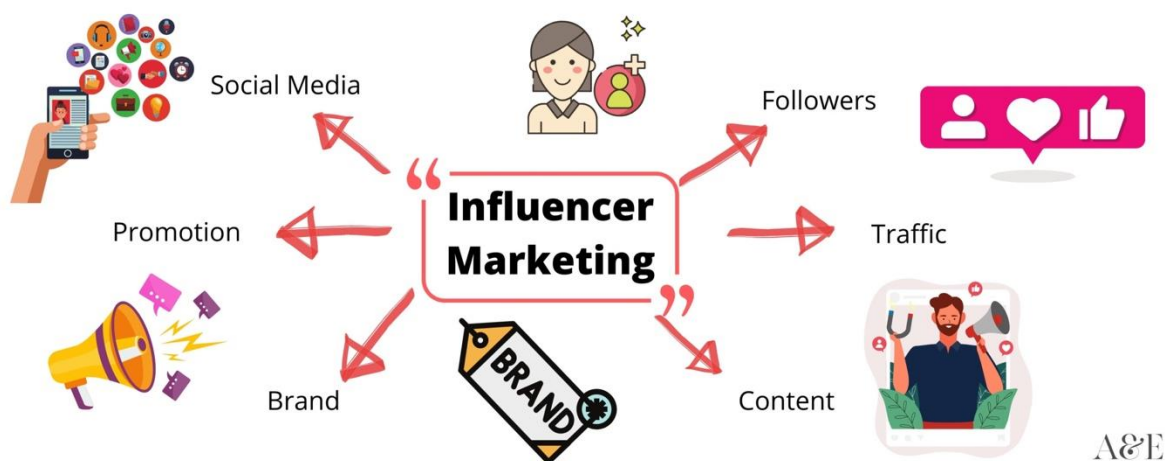
At the same time, the tourism sector and the ICT industry in Eswatini should develop a tourism app for business visitors and tourists that will plug in visitors to all current and upcoming events as soon as they enter the country. This can be negotiated in conjunction with the mobile network operators. Apparently, the Department of Science and Technology at UNISWA had a competition for students and the winners are building a destination app for Eswatini. Also Daniel, Bush Travel Tours is developing a food app, Yebo Taste. If they are well done, these should be embraced by HOTAES and quickly introduced but there is need for a coordinating entity for various initiatives that separately are not optimal. There is need for a holistic approach to tourism advertising and promotion.

6) Recruit a famous travel influencer on Instagram to stimulate interest in Eswatini.

The growing presence of social media influencers (SMIs) is increasingly modulating consumer behaviour in the travel industry. With social media platforms such as Facebook, Instagram among many others, quickly becoming an indispensable part of daily life, social media marketing now offers a wide consumer base cutting across countries and cultures. With a combined network of around 3 billion people across such platforms, establishing an effective influencer marketing strategy will become an essential part of marketing efforts and allow brands to connect to their niche audience via leading travel influencers.²⁴

Although traditionally Eswatini has relied on conventional supply chains for long-haul tourists, the pandemic has changed the rules of the game. And the civil unrest situation will deter the historical type of tourist from visiting but not the young and restless, Gen-Y and Millennial traveller. It is necessary to reach them in their usual channels of communication on social media. And influencers may be much better than tourism trade fairs for this demographic.²⁵ It should also be noted that in 2019, 41% of first visitors to Eswatini indicated the Internet as the source of their information compared to 25% from an agent. As the ETA (2019, p. 20) reported:

The internet remained the leading source of information about Eswatini for most first-time visitors, which saw the users increase by 11% to 182,602 in 2019. Most internet users came for holiday (83.5%) with the remaining 13.2% constituting transit travellers.



Influencer marketing is a process of using influential figures to build brand popularity, establish loyalty and trust, and sell products. Although the process mainly utilised celebrities or public figures in the past, today influencer marketing mainly refers to social media influencers. Influencer marketing in the travel industry offers a diverse array of tools and advantages that traditional models of marketing are struggling to compete with. Whether it is the trust that the influencers have built with their follower base, or the

²⁴ <https://www.amraandelma.com/influencer-marketing-strategy/>

²⁵ Anuar, Faizan et al. Young Tourists' Trust in Instagram Travel Influencers and their Intention to Visit Travel Destinations. 2021.

numerous business models that they offer, influencers have a bigger reach than conventional advertisements. Like everything else, tourism advertising has to embrace the new means of communication and social interaction. A list of the most popular travel influencers can be found at - <https://www.amraandelma.com/100-top-travel-influencers/>

7) Run a giveaway contest on Tiktok for holidays in Eswatini in 2023 and 2024.

A holiday giveaway contest should be organised for a week in Eswatini on TikTok and/or relevant social media. This will put the destination on the map for a younger demographic and the FITs market (free, independent travellers). And it will get people talking about Eswatini all over the world. Tourism businesses could pool resources and cover the cost of airfare, hotel, etc. for the winners of the contest. Or HOTAES can try to get an airline to sponsor the flights from Europe or North America to Eswatini. Perhaps Emirates or BA or KLM, or Delta, Lufthansa. Apparently, a competition for holidays in Jordan went viral on the Internet not long ago and significantly increased interest globally in tourism there.

8) Provide training on Internet marketing & use of social media to tourism operators

While many tourism-related businesses in Eswatini do have websites, they lack “Internet smarts” such as search engine optimisation, strategic use of Google ads, Facebook ads, etc. And how to harness social media platforms in general, for commercial benefits. In order to reach a wider African or even a global audience the online presence of most tourism operators in Eswatini will have to be ramped up. A review of videos online (Youtube) dealing with Eswatini on July 25, 2022 revealed relatively low hits or viewership. The Box below shows the most “popular”.

Official Eswatini tourism video (Backpacker Films) – 41,000 views Royal Villas – 36,000 views A Journey through Swaziland – 79,000 MTN Bushfire – 14,000 views

Most videos had very little viewer traffic and the following was quite poor:

Central ESW (cultural heartland) – 1,100 views Northwest ESW (highland adventures) – 457 views Northeast ESW (conservation & community) – 271 views Southeast ESW (wildlife up close) – 310 views. Shades of Sibebe - 84 views Eswatini Reed Dance (2019) – 245 views
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It is not enough to simply ‘have’ a presence, if that presence goes largely unnoticed. A robust social media strategy is required, which includes, engagement strategies, community building, and more comprehensive website integration and ads.

TripAdvisor is the #1 website in the world for travel and tourism and is in the top 200 most frequented websites globally. As traditional travel agents are fading out to self-travel agents, TripAdvisor is a resource heavily used by many to plan vacations. Eswatini has a very weak presence on TripAdvisor – limited listings, low number of reviews, unanswered questions, little feedback/acknowledgement of reviews left. A search for Eswatini on TripAdvisor brought up about 500 entries (17 pages), most of which are accommodations. And the Things to Do list has about 90 items with very low numbers of reviews, and many items that really deal with South Africa rather than Eswatini. The highest number of reviews are: Swazi Candles – 295; Ngwenya Glass – 283; Cultural Village – 254. There is a total of 13,782 reviews and opinions for Eswatini. In comparison, Mauritius has 509,557, Mozambique, 55,715 and Botswana has 59,947 reviews and opinions on TripAdvisor. Not surprisingly, South Africa has 2,855,745.

It is strongly recommended that HOTAES and ETA arrange training workshops for tourism stakeholders on optimising use of the Internet and social media for small tourism operators. This can be funded from the program managed by the International Trade Centre (ITC).

11 BUSINESS STRATEGY FOR HOTAES

11.1 Purpose of HOTAES

The HOTAES was registered as a non-profit making body in 2018. Some of its main objectives are as follows:

- 1) To promote the interests of its members associated with the tourism industry.
- 2) To actively promote and aid the Tourism Industry in Eswatini;
- 3) To promote, support or oppose legislation affecting tourism and /or the interests of members;
- 4) To review, support or oppose applications to any licensing authority in the interest of members;
- 5) To represent the views of employers in the industry through, or in association with the Federation of Employers, and /or the Chamber of Commerce and Industry in all matters affecting employment and related economic and social conditions;
- 6) To advise, mediate, and generally to assist members in resolving disputes affecting the interests of members, individually or as a whole.
- 7) To co-operate with and make representations to Government Departments and any other agency on matters affecting the interests of the members;
- 8) To encourage and promote the education and training of potential and existing employees in the industry with the object of maintaining and improving standards of service in the industry;

This is a very tall order for a volunteer-run association. It is therefore not surprising that it has not been able to provide significant services or support to its members although it has been very active in terms of its advocacy role for the tourism sector. Furthermore, a survey of HOTAES members revealed that there is a role for it to play in various areas of activity. (See Annex VI for the complete list of what tourism operators want from their Association).

Given the apparent disconnect between the public sector agencies and the tourism sector, the onus is on the economic actors in tourism to implement actions to help tourism rebound from the pandemic and to grow. To date, the tourism sector in Eswatini has been less than impressive in terms of growth of numbers of tourists and innovation in terms of marketing and promotion. Whatever has been done so far does not seem to be working as is clearly evident in the declining numbers of European and other long-haul tourists, even before the pandemic. The ETA has a small budget for promotion of tourism and this has its limits. And given the state of government finances it is unlikely that more support will be given to the tourism sector. New approaches need to be deployed to attract people to the country. Some individual tourism operators in Eswatini have done well over the years and are well known and have invested significantly in promoting their activities but there is need for a collective, “whole destination” effort to not only market the country but also to increase standards and quality of service to stand out among the tremendous competition that exists in Southern Africa. In other words, there is need for an industry-wide approach to marketing and promotion as well as standards in the sector. This requires an industry association that is well-resourced and energetic in order to promote and drive change. Simply put, HOTAES needs to take some cues from HATAB in Botswana and SATSA in South Africa.

But first, HOTAES needs to establish a better membership model so that it can actually employ staff. To begin with, the membership rates will need to pay for the staff salaries and administrative expenses. E300 annual membership is too low, and that is the majority of the members.

SWOT Analysis

The following is a summary analysis of the strengths, weaknesses, opportunities and threats (SWOT) relevant to HOTAES:

Figure 3. HOTAES SWOT analysis

STRENGTHS	WEAKNESSES
1. Forum for members; WhatsApp Group, monthly meetings 2. Advocacy on behalf of the sector 3. Good networking with policy makers and stakeholders 4. Coordinate training activities 5. Awareness of changes in the tourism sector nationally and regionally	1. Inadequate information dissemination 2. Low recognition & awareness of HOTAES 3. Accountability 4. Not known amongst regional associations 5. Limited product offering for members. 6. Inadequate diversity of representation 7. Clarification between Ministry, ETA and HOTAES 8. Low membership 9. Industry training 10. Not able to maintain national standards
OPPORTUNITIES	THREATS
1. Establish an office 2. Affiliate with regional, and international associations. 3. Revise Membership model 4. Advocacy: 5. Obtain credibility by ensuring members are legal 6. Branding / rebranding 7. List of everyone in the industry 8. HOTAES and ETA to have combined marketing committee 9. Share information about matters related to access to finance 10. Representation on wages council 11. Training 12. Tourism expo, for supplier and buyer	1. Civil Unrest 2. Pandemic 3. Ngwenya Mine 4. Coal fired thermal power station 5. Impact of the Russian – Ukraine war 6. Limited revenue stream

In order to cater to the needs of its members and to help the tourism industry rebound after the pandemic, the following are elements of a strategy and business plan for HOTAES.

11.2 Build a professional association

First, HOTAES must become a professional association with people specifically responsible for the affairs of the association (not volunteers and reliance on goodwill) in order to deliver key services to its members and effectively represent the interests of the tourism sector of Eswatini, nationally, regionally and internationally. It should act as a better conduit between policymakers and the private sector and should foster public-private sector partnerships to improve the overall situation in the tourism sector. However, given the persistent shortcomings on the part of the public sector regarding the tourism sector, HOTAES will also have to lead the charge in rebuilding the tourism business in Eswatini. This means that it must set up an office with staff to design projects and events and deliver more services to its members and the wider tourism sector. A useful example of a tourism association that is successfully guiding and supporting its tourism industry is the Hospitality and Tourism Association of Botswana (www.hatab.bw). HATAB is well-organized and provides many services to its members, directly and indirectly, and ensures quality control in the tourism industry in Botswana.

HOTAES also needs to become more representative of the tourism sector in Eswatini. At the moment, its Executive Committee predominantly consists of hotel representatives and along the traditional transport corridor. It will have to attract a broader spectrum of members and its Executive Committee (or Board when it reorganises) must have representatives from the different sub-sectors. It is recommended that the board of HOTAES consist of the following representative sub-sectors:

Hotels & restaurants, lodges and camps, tour operators, travel agencies, game parks, art & craft, community & volunteer tourism, and transport.

Discussions and issues addressed in HOTAES meetings should be reflective of the interests of tourism operators all over the country and not only in the main Ezulwini/Manzini corridor. Also, every effort should also be made to ensure that HOTAES keeps intimately in touch with small operators and try to attract them to become members. The larger the size of any network, the greater is its utility and impact.

In the short term, HOTAES will only be able to obtain income from registration fees but eventually it can develop revenue streams from training activities and perhaps online advertising from its website.²⁶ A professionally run HOTAES will also eventually be able to obtain some funding from international donors for specific projects and initiatives. In the future, other revenue streams can be developed. For instance, a coffee table book on the flora and fauna and special natural attributes of Eswatini can be developed and published. If at least 200,000 new tourists visit the country each year, it will be possible to sell a couple thousand copies annually.

In order to staff a new HOTAES it will be necessary to recruit a dynamic, innovative, confident and well-trained person with excellent communication skills. To attract such a person will require a salary of E25-30,000 per month. And an administrative person to run day to day affairs. The annual staff budget will be about E500,000. Rental of an office will also be a recurrent cost unless in the meantime, a hotel or tourism facility with space can grant HOTAES office space for a year or two in order for it to start up operations.

11.3 Introduce a new membership fee structure

The current membership structure is as follows:

- Bronze E300 for entities with 5 or less employees
- Silver - E1,500 for 6 to 30 employees
- Gold - E2,400 for 31 employees or more

Apparently, the reason for the low Bronze rate was to encourage the small companies, community projects and tour guides to join. But the model seems to have failed as most members are Bronze, even organisations with large turnover joined as Bronze having had to retrench staff due to the tourism crisis. HOTAES needs substantially more revenue in order for it to become a catalyst for the tourism sector.

The following membership subscription structure is proposed

Platinum - E10,000 per year

- Access to first tier training
- Access to tour operator databases
- Privy to, and have a say in advocacy.

Gold - E5000 per year

- Access to second tier training
- Access to tour operator databases
- Privy to, but do not have a say in advocacy

Silver - E2,500 per year

- Access to tour operator databases

Bronze - E1,000 per year

- Micro-and small businesses and community tourism only

²⁶ Note that HATAB in Botswana gets 55% of its revenue from the rental of camp sites that it controls. It has a staff of 8 persons but started off years ago with only 2 persons.

Currently HOTAES has 78 paying members with total annual revenue of E79,500. This is a paltry amount from which little can be done to assist or guide the tourism sector. The anticipated new revenue base (from a total of 247 potential members) could be as follows:

Platinum	20 x 10,000 = E200,000
Gold	50 x 5,000 = E250,000
Silver	75 x 2,500 = E187,500
Bronze	20 x 1000 = E20,000
Total project revenue of	E657,500

11.4 Promotion of HOTAES

In order for it to be effective, HOTAES needs to become almost a household name in Eswatini and all tourism operators should be very familiar with it; this includes everyone in the tourism value chain – from hotels to tour operators, event managers, adventure companies, hiking companies, taxis, bus companies, restaurants, car rental companies, retail outlets, among others.²⁷ This means that all members of HOTAES must become involved in promoting and advertising the association so that its profile and status improves. It may also require some domestic advertising and more aggressive advertising at regional trade fairs and events.

11.5 Development of a new HOTAES Website

HOTAES currently has a Facebook page, and a website that is not sufficiently interactive enough and connected to operator websites in a manner that will drive people quickly to particular activities. It is a sort of passive website. The new HOTAES will need to have a professionally designed and built website that is linked to relevant regional and international associations and bodies. And it should have links to operators among its membership in each subsector – for instance, hotels, transport companies, tour operators, game parks, etc. that quickly (automatically) takes the potential tourist to websites that are also interactive and ready to do business; in other words, booking facilities. Several of the links to members websites from HOTAES website apparently do not work. It should also have a current and continually updated Events Calendar. In other words, it should become the first go-to place for information on tourism, entertainment/culture and sports events in Eswatini. This is especially important as the government agencies dealing with tourism are being reorganised and merged (ETA, ENTC, Culture Foundation) as recently announced.

Budget for website development – E12,000. Ongoing updates of the HOTAES website will have to be done by the new staff to be hired.

11.6 Join regional and international tourism bodies

Southern Africa Tourism Services Association, (SATSA)

Eswatini's tourism is inextricably linked to South Africa due to geographic, logistical and other reasons. It is therefore important for HOTAES to be plugged into the tourism industry ecosystem in South Africa. In this regard, it is important to join SATSA. Being a member of SATSA will give HOTAES first-hand information and understanding of a successfully managed inbound tourism association.

SATSA membership benefits²⁸ include:

1. Credibility – SATSA is recognized in Southern Africa as a very credible and distinguished organisation recognized internationally. It will take a long time for HOTAES to become known from its own efforts.
2. Tremendous Networking opportunities and liaison with tourism stakeholders

²⁷ Note that an experienced taxi driver linked to the Hilton in Mbabane had never heard of HOTAES and did not know that a hotel or tourism association existed before.

²⁸ See - <https://satsa.com/member-benefits/>

3. Lobbying – this will give HOTAES insight into how SATSA engages in ongoing interaction with South African Tourism (SAT), provincial and regional tourism bodies.
4. International profiling - SATSA is well-recognised internationally, with its Head Office often fielding calls and emails from international buyers and agents enquiring whether a product is SATSA accredited.
5. Market Access - centralised database of a wide range of global and regional tourism operators.
6. Knowledge-sharing - Chapter meetings with keynote speakers on topics of relevance.
Newsletters that include communication from SATSA's Head Office, and industry news about events, members and partners.

HOTAES and its members will also indirectly benefit from the close links that SATSA has with the following entities, among others:

- National Department of Tourism (NDT)
- South African Tourism (SAT)
- Tourism Business Council of South Africa (TBCSA)
- Association of South African Travel Agents (ASATA)
- Tourism Marketing SA (TOMSA)
- Culture Art Tourism Hospitality and Sports Sector Education and Training Authority (CATHSSETA)
- Federated Hospitality Association of Southern Africa (FEDHASA)
- Airlines Association of Southern Africa (AASA)
- Board of Airline Representatives of South Africa (BARSA)
- Provincial Tourism Authorities

The CEO of SATSA has indicated that HOTAES could become a second-tier member for E16,000 per year. It will then have access to SATSA database and information provided to second tier members. This seems a very sensible and effective investment.

African Travel and Tourism Association (ATTA)

The African Travel & Tourism Association (ATTA) is a member-driven trade association that promotes tourism to Africa from all corners of the world. ATTA serves and supports businesses in Africa representing buyers and suppliers of tourism product across 21 African countries. With almost 600 members, ATTA acts as Pan-Africa's largest network of tourism product covering not only accommodation, transport and travel specialists in Africa, but a large selection of tour operators, representation and PR companies worldwide promoting tourism to Africa.

Apparently, Eswatini and Lesotho are the only two countries in Southern Africa with no representation in ATTA. The organisation has little knowledge about Eswatini and was not aware of HOTAES. It would make sense to get the greatest exposure possible in travel and tourism circles in the region. Joining ATTA will help in this regard and advertise Eswatini's product offerings to a wider possible clientele and tourism business brokers. It will allow networking at key trade shows and other networking events throughout the year around the world. Also, it will provide the opportunity to exhibit at trade shows both physically and digitally on the ATTA pavilion and access to exclusive members-only rates and benefits at other trade shows.²⁹

HOTAES should become a reciprocal member, which costs GBP 350 per year. There is a joining fee of GBP 310 but perhaps that might be waived (as a tourism organisation). It is recommended that HOTAES join ATTA.

World Tourism Organisation (UNWTO) Affiliate

In order to raise the profile of Eswatini as a tourism destination, it may also be useful to consider joining the UNWTO as an Affiliate member; but perhaps later on when HOTAES has a more stable and diverse

²⁹ See - <http://www.atta.travel/membership/reasons-to-join/>

revenue stream. Affiliate status will grant it various benefits that would help with making Eswatini known and on the radar screen in global tourism circles. Some of the benefits or facilities to be enjoyed from membership are as follows below.

The AMConnected is an exclusive interactive platform for UNWTO's Affiliate Members whose main purpose is to boost networking and business opportunities among them. It enables users to find complete lists of Affiliate Members and filter them by region, country or activity; post information on their main activities and projects; be always up-to-date with the events and initiatives organized by the UNWTO; and access the most relevant documents published by it. The platform is the main tool to boost communications between the Affiliate Members and raise their visibility. In addition to it, we have the AM Newsletter, published on a monthly basis, which offers to our members the opportunity to showcase their events, projects and initiatives. Lastly, the Affiliate Members, upon formal approval, are allowed to include the UNWTO Affiliate Members logo on the website and/or stationary to give visibility to their membership.

The Affiliate Members Department also seeks to establish partnerships with its Affiliate Members and develop joint initiatives with them. For that purpose, every year they launch a Call for Proposals for the Programme of Work, which describes the main priorities and lines of action of the department and a list of activities that UNWTO will implement with its members. Affiliate Members are invited to submit proposals on joint initiatives, webinars, events and publications to be included in the Programme of Work.

At an annual fee of 2,500 euros per year, it is a substantial investment but in the first instance HOTAES can approach donors for funding to become an Affiliate member for 2-3 years. This will then allow it to increase the profile of the tourism industry in Eswatini and judge the benefits of continuing membership in UNWTO.

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Annex I: Inventory of Accommodation Facilities in Eswatini

HOTAES member	Establishment Name	Type	Location	Occupancy	Conference	Restaurants	Bars	Website
	African Violet	Backpackers	Pine Valley	18	0	0	0	www.africanvioletszaziland.net
	Asante Guesthouse	Guesthouse	Manzini	20	2	1	1	www.asanteswazi.com
	Assegai Inn	Hotel	Hlatikulu	7	1	1	3	
	Barkery Guest House	Guest House	Mbabane	23	0	0	0	
	Bend Inn	Hotel	Big Bend	32	0	1	1	
	Benka Lifestyle	B&B	Lobamba	14	0	0	0	
	Bethel Court	Hotel	Ezulwini	103	3	2	0	www.swazibethelcourt.com
	BK Lodge	B&B	Nkoyoyo	22	2	1	2	www.bklodge.com
	Blossom Rest house	B&B	Manzini	5	1	0	0	www.blossomresthouse.com
	Brackenhill Lodge	B&B	Mbabane	22	0	1	0	www.brackenhillswazi.com
x	Brookside Lodge	Self Catering	Malkerns	51	2	1	1	www.brookside-lodge.com
	Buckwood House	B&B	Siteki	46	1	1	0	
	Buhleni Farm Chalets	Self Catering	Ezulwini	95	0	0	0	www.buhlenifarm.co.sz
x	Bulembu Country Lodge	B&B Self Catering Backpacker	Bulembu	36 50 98	1	1	0	www.bulembu.org
	Bushbaby Lodge	B&B	Sidvokodvo	32	1	0	0	www.nkonyenilodge.com
	Bushlands Farms	Self Catering	Big Bend	8	0	0	0	
	Cathmar Cottages	Self Catering	Mbabane	14	0	0	0	www.visitswazi.com/cathmar
	Charmz Guest House	Guest House	Manzini	13	1			
	City Court Guest House	Guest House	Mbabane	14	2	1	0	www.citycourt.co.sz
	Crisovik Guest House	Self Catering	Mbabane	14	0	0	0	www.crisovik.com
	Damicha Lodge	B&B	Ezulwini	22	0	0	0	www.damichalodge.com
	Day Eve Guest House	Guest House	Manzini	5	1	0	0	
	Dee's Guest House	Guest House	Nhlangano	9	1	0	0	
	Diamond Guest House	Guest House	Nhlangano	8	0	1	1	
x	Dombeya Game Reserve	Self Catering	Manzini region	16	0	0	0	www.dombeya.org
	Early Riser	Guest House	Manzini	10	0	0		www.earlyriser.com
	Ebuhleni Guest House	Guest House	Ezulwini	10	1	0	0	www.swaziwoodlands.com
	Eden Guest House	B&B	Mbabane	18	0	0	0	
	Ekulindzeni Leisure Homes	B&B	Mbabane	18	1	0	0	www.visitswazi.com/ekulindzeni/index.html
	Ekupholeni Garden Villas	B&B	Manzini	20	1	1	0	www.ekupholenigardenvillas.com
	Ekuphumuleni Guest House	Guest House	Mantenga	9	0	0	0	
	Emafini Lodge	Hotel	Mbabane	33	3	1	0	www.emafini.co.sz
	Emathombeni House	Self Catering	Nkoyoyo	6	0	0	0	
x	Ematjeni Guest House	B&B	Mbabane	5	0	0	0	www.ematjeniguethouse.com
	Emerald Lodge	Lodge	Manzini	10	0	0	0	

HOTAES member	Establishment Name	Type	Location	Occupancy	Conference	Restaurants	Bars	Website
	Emphandzeni Hotel	Hotel	Mafutseni	12	0	1	1	
	Enkhosi Guest House	Lodge	Nhlangano	12		1	0	
	Esibayeni Lodge	Hotel	Matsapha	468	15	3	2	www.esibayenilodge.com
	Esthers Lodge	B&B	Malkerns	16	0	0	0	www.estherslodge.com
	Eveni Guest House & Restaurant	Guest House	Mbabane	12	1	0	0	www.eveniguethouse.com
	Ezulwini Executive Apartment	Self Catering	Ezulwini	10	0	0	0	
	Ezulwini Guest House	Guest House	Ezulwini	8	1	0	0	www.ezulwiniguethouse.com
	Fairview Guest House	Guest House	Manzini	24	1	0	1	www.fairviewquesthouse.net
	Farm 31 Estate	Lodge	Hawane	10	1	0	0	www.farm31estate.com
	Farm Lodge	Lodge	Edwaleni	35	2	1	1	www.dwalenifarmllodge.co.sz
x	Foresters Arms Hotel	Hotel	Mhlambanyatsi	52	1	1	1	www.forestersarms.co.sz
	Gallery Hotel	Hotel	Matsapha	68	1	1	1	www.gallery-hotel.com
	Garden City Guest House	Guest House	Manzini	6	0	0	0	
	Gibela Getaway Lodge	Self Catering	Manzini	40	0	0	0	www.visitswazi.com/gibela
x	Global Village Guest House	Guest House	Manzini	60	3	1	1	www.swaziglobalvillage.com
	Gogga's Nest	B&B	Matsapha	6	1	1	1	
	GPG Investment former Lismore Lodge	B&B	Big Bend	52	0	1	1	
	Green Haven Luxury Apartments	Self Catering	Ezulwini	16	0	0	0	www.greenhavenluxury.com
x	Happy Valley Resort & Casino	Hotel	Ezulwini	98	5	2	2	www.happyvalleyhotel.com
	Havilla Court	Guest House	Manzini	20	2	1	1	
	Hawane Backpackers	Backpackers	Hawane	52				www.hawaneresort.com
	Hawane House-Boat	House-boat	Maguga dam	4	0	0	0	www.hawaneresort.com
x	Hawane Resort	Lodge	Hawane	46	1	1	1	www.hawaneresort.com
	Highlands Inn	Hotel	Piggs Peak	25	1	1	1	
	Highlands view	Guest House	Mbabane	16	0	0	0	
x	Hilton Garden Inn	Hotel	Mbabane	248	8	1	1	www.hgi.com
x	Hlane Royal National Park	Self Catering B&B Camping	Simunye	52 48	0	1	1	www.biggameparks.org
	Immanuel Guest House	Guest House	Mbabane	15	1	0	0	www.immanuelquesthouse.com
	Ingwemabala Executive Lodge	Guest House	Ngwenya	8	0	0	0	
	Jama's Place Lodge	B&B	Nkoyoyo	20	0	0	0	www.jamasplacelodge.com
x	KaMsholo Bushveld safaris	Self Catering Backpackers Guest House Camping	Nsoko	51 20 18	2	1	1	www.biggameparks.org
	Kent Rock B&B	B&B	Mbabane	2	0	0	0	www.kentrockaccommodation.co.sz

HOTAES member	Establishment Name	Type	Location	Occupancy	Conference	Restaurants	Bars	Website
	Legends Shared	Backpackers	Mantenga, Ezulwini	100	1	1	1	www.legends.co.sz
x	Lidwala Lodge	Self Catering	Ezulwini	40	0	0	1	www.lidwala.co.sz
	Lijuba Guest House	Guest House	Siteki	39	1	0	0	
x	Mabuda Farm	Self Catering Backpackers Camping	Siteki	37 12	0	0	0	www.mabuda.com
	Macatini Guest House	Guest House	Mbabane	30	0			www.macatiniguethouse.com
	Madonsa Guest House	Guest House	Manzini	22	0	0	0	www.madonsa.co.sz
	Mafalala B&B	B&B	Siteki	8	1	1	0	
	Magadzavane Lodge	B&B	Mlawula	78	1	1	1	www.entc.org.sz
	Maguga Lodge	Lodge	Piggs Peak	70	2	1	1	www.magugalodge.com
	Mahamba Gorge	Self Catering	Mahamba	12	0	0	0	www.mahambagorgelodge.com
x	Malandelas Guest House	Guest House	Malkerns	15	1	1	1	www.malandelas.com
	Malolotja Nature Reserve	Self Catering Backpackers Camping	Nkhaba	30 10	0	1	1	www.entc.org.sz
	Mananga Country Club	Guest House Self Catering Camping	Tshaneni	40 8	1	1	1	www.manangalodge.com
	Mantenga Hail View Boutique Hotel	B&B	Mantenga	14	0	0	0	www.mantengahail.com
x	Mantenga Lodge	Hotel	Ezulwini	75	1	1	1	www.mantengalodge.com
	Mantenga Nature Reserve	Lodge	Ezulwini	30	1	1	1	www.entc.org.sz
	Manzini Lodge	Backpackers	Manzini	14	1	0	0	
	Matsapha Inn	Hotel	Matsapha	32	0	1	0	
	Mayoloza B&B and Backpackers	B&B	Ezulwini	14	0	1	0	
	Mbabane Bed & Breakfast	B&B	Mbabane	6	0	0	0	
	Mbare Guest House	B&B	Manzini	7	0	0	0	
x	Mbuluzi Game Reserve	Self Catering	Mlawula Rd, Simunye Lubombo	72	0	0	0	www.mbuluzi.com
	Mdzimba Mountain Lodge	Self Catering	Ezulwini	14	0	0	0	www.swatitravelandtours.com
	Meilkes Mount	Self Catering	Mhlane / Mantabeni	28	1	0	0	
x	Mhlume Country Club	Lodge	Mhlume	50	3	1	1	www.mhlumeclub.com
	Mhlumeni Bush Camp	Self Catering	Mhlumeni	18	1			
x	Mkhaya Game Reserve	Lodge	Siphofaneni	33	0	1	1	www.biggameparks.org
	Mlawula Nature Reserve	Self Catering Camping	Mlawula	7	0	0	0	www.entc.org.sz
x	Mlilwane Wildlife Sanctuary	B&B	Malkerns	138	1	1	1	www.biggameparks.org

HOTAES member	Establishment Name	Type	Location	Occupancy	Conference	Restaurants	Bars	Website
		Self Catering Camping		40				
	Mocambique Hotel	Hotel	Manzini	29	0	1	1	
x	Mogi Boutique Hotel	Hotel	Ezulwini	16	0	1	1	https://mogihotel.com
	Moneni Guest House	Guest House	Manzini	21	0	0	0	
	Mountain Beauty Villa	B&B	Mbabane	6	0	0	0	
x	Mountain Inn Hotel	Hotel	Mbabane	121	5	2	2	www.mountaininn.sz
	Mthunzi's Paradise	Backpackers	Ekufikeni	8	0	0	0	
		Camping						
	Mvubu Falls Hotel	Lodge	Malagwane	22	0	1	1	www.mvubufalls.com
	Nana's Place	Lodge	Mbabane	7	0	0	0	www.nanasaccommodation.com
	Nhlangano Casino Royale	Hotel	Nhlangano	114	2	1	1	www.nhlanganocasino.org
x	Nkonyeni Lodge and Golf Estate	B&B Self Catering	Nkonyeni	76 6	1	1	1	www.nkonyeni.com
	Nyanza Guest Cottages	Self Catering	Malkerns	21	0	0	0	www.nyanza.co.sz
	Open House Boutique Hotel	Hotel	Manzini	23	1	1	0	www.openhouseboutique.co.sz
	Opulence Lodge	Lodge	Mbabane	17	0	0	1	
	Otentik Guest House	Guest House	Mbabane	5	0	1	0	
	Palm Tree Guest House	Guest House	Manzini	30	1	1	0	
	Park Hotel	Hotel	Manzini	72	2	1	0	www.swaziplace.com/parkhotel
	Peace Centre Guest House	Guest House	Manzini	10	1	0	0	www.peacecentrequesthouse.net
	Peace Valley	Guest House	Manzini	10	0	0	0	www.peacevalleyquesthouse.co.sz
	Phibs Guest House	Guest House	Mbabane	14	0	0	1	
x	Phophonyane Falls Lodge & Nature Rserve	B&B	Piggs Peak	33	0	1	0	www.phophonyane.co.sz
x	Phumula Farm Guest House	Guest House	Nhlangano	84	4	0	0	www.phumulaguesthouse.co.za
x	Piggs Peak Hotel & Casino	Hotel	Piggs Peak	208	5	2	3	www.piggspeakhotelandcasino.com
	Rainbird Chalets	B&B	Malkerns	10	0	0	0	www.rainbirdchalets.com
	Red Berry B&B	B&B	Mbabane	12	0	0	0	www.redberrybb.co.sz
	Rehoboth Mountain Suites	B&B	Mbabane	12	0	0	0	www.rehobothsuites.com
x	Reilly's Rock Hilltop Lodge	B&B Self Catering	Malkerns	12 6	0	0	0	www.biggameparks.org
	Rest Camp Guesthouse	Guesthouse	Madonsa	15	0	1	1	www.restcamlodge.com
	Rest Camp Lodge	B&B	Manzini	45	1	1	1	www.restcamlodge.com
	Ritz Accommodation	Lodge	Manzini	29	0	0	0	
	Riverside Hotel	Hotel	Big Bend	46	3	1	1	
	Road Lodge	Guest House	Manzini	20	1	0	0	www.roadlodge.net
	Roadside B&B	B&B	Lavumisa	4	1	1	1	

HOTAES member	Establishment Name	Type	Location	Occupancy	Conference	Restaurants	Bars	Website
x	Royal Jozini Private Game Reserve	Self Catering	Lubombo	64				www.royaljozini.com
	Run' Fire Garden court	Guest House	Mbabane	9	1	0	1	www.runinfire.takagogo.com
	Salt & Pepper Guest house	Guest House	Matsapha	10	0	0	0	
	Shewula Mountain Camp	B&B Camping	Shewula	32	1	1	0	www.shewulacamp.com
	Shield Guest House	Self Catering	Mbabane	20	0	0	0	www.visitswazi.com/cathmar
x	SibaneSami Hotel	Hotel	Ezulwini	62	5	1	1	
x	Sibebe Resort	Self Catering	Hhohho	92	1	1	1	
x	Silverstone Lodge	B&B	Mbabane	10	0	1	0	www.silverstonefalls.com
x	Simunye Country Club	B&B	Simunye	140	2	1	1	www.simunyeclub.com
	Siteki Hotel	Hotel	Siteki	72	3	1	4	www.sitekihotel.co.sz
	Sobantu Guest Farm	Guest House	Mnyokane	24	0	1	1	www.sobantu-swaziland.com
	Sondzela Backpackers	Backpacker	Malkerns	80	0	0	1	www.biggameparks.org
	Stan's Lodge	Self Catering	Motshane	18	0	0	0	
x	Summerfield Botanical Garden & Exclusive Resort	Hotel	Nokwane	70	1	2	2	www.summerfieldresort.com
	Sundowners Lodge	B&B	Mahlanya	12	0	1	1	www.sundowners.co.sz
	Sunset View Guest House	B&B	Piggs Peak	7	0	0	0	www.sunsetviewguesthouse.net
	Swazi Ark of Arts & Culture	B&B	Eluvinjelweni	16	0	0	0	
	Swazi Oak Lodge	B&B	Mbabane	28	0	1	0	
	Tambankulu club & Guest House	B&B	Tambankulu	24	2	1	1	www.tambankulu.co.za
x	Tfutjana Mountain Resort	B&B	Mkhondvo	21	1	1	0	
x	The George Hotel	Hotel	Manzini	228	5	2	3	www.tgh.co.sz
	The Hive Guest House	B&B	Mankayane	16	0	0	0	
	The Lebombo Villa B&B	B&B	Big Bend	21	0	0	0	
	The Lodge	Lodge	Mbabane	8	1	0	1	
	The Orchards	Guest House	Matsapha	12	0	0	0	
	The Place	Guest House	Mbabane	20	0	1	1	www.theplaceswaziland.com
x	The Royal Villas Hotel	Hotel	Ezulwini	110	4	1	1	www.royalvillas.co.sz
	The Unity Guest House	Guest House	Mbabane	16	1	0	1	
	Thokoza Anglican Conference	B&B	Mbabane	74	7	0	0	
	Thula Du Estate	Self Catering	Malagwane	12	0	0	0	
	Timbali Lodge	B&B	Ezulwini	73	2	1	1	www.timbalilodge.co.sz
	Tio-Ze Restaurant & Motel	B&B	Malindza	18	0	1	1	
	True Reality Guest House	Guest House	Manzini	14	0	0	0	
	Tums Water World Hotel	Hotel	Sidvokodvo	62	3	1	1	
	Ubombo Country Club	Lodge	Big Bend	36	1	1	1	
	Umushi Wenkosazana Spar Boutique	Lodge	Forbes Reef	40	0	1	1	

HOTAES member	Establishment Name	Type	Location	Occupancy	Conference	Restaurants	Bars	Website
x	Upper Room Guesthouse	B&B	Mbabane	15	0	0	0	www.nanasaccommodation.com
	Ursel Guest House	Guest House	Manzini	14	1	1	0	
	Vakasha Lodge	Lodge Camping	Siphofaneni	24	0	1	1	https://vakasha-lodge.business.site
	Valley Side Executive Apartments	Self Catering	Ezulwini	12	0	0	0	www.greenhavenapartment.com
	Valley View Lodge	Lodge	Manzini	25	1	1	1	www.valleyviewlodgesd.com
x	Vekis Town Lodge	Self Catering	Mbabane	15	0	0	0	
x	Vekis Village	Self Catering	Mbabane	38	0	0	0	
	Victory Guest House	B&B	Ezulwini	14	0	0	0	
	Wendy's Lodge	Lodge Camping	Siphofaneni	14	0	1	2	
x	Wide Horizon Mountain Retreat	Self Catering	Makhungutsha Mountains, Malkerns	24	1	0	0	www.widehorizonsretreat.com
	Willows Lodge	Self Catering	Malkerns	38	0	0	1	www.willowslodgeswaziland.com
	Windsor Garden Guest House	B&B	Matsapha	12	1	1	1	
	Zamekile Guest House	Guesthouse	Manzini	8	0	0	0	
TOTALS 199 accommodation types within 179 establishments 6509 162 92 87								

* Occupancy does not include camping

Annex II: Inventory of Food & Beverage Establishments

HOTAES member	Establishment Name	Location	Within accommodation	Restaurants	Bars	Fast Food	Franchise	Website
	Adega Restaurant	Ezulwini		1				
	Apple Café	Manzini		1				
	Asante Guesthouse	Manzini	x	1	1			www.asanteswazi.com
	Assegai Inn	Hlatikulu	x	1	3			
	Bend Inn	Big Bend	x	1	1			
	Bethel Court	Ezulwini	x	2				www.swazibethelcourt.com
	BK Lodge	Nkoyoyo	x	1	2			www.bklodge.com
	Brackenhill Lodge	Mbabane	x	1				www.brackenhillswazi.com
x	Brookside Lodge	Malkerns	x	1	1			www.brookside-lodge.com
	Buckswood House	Siteki	x	1				
x	Bulembu Country Lodge	Bulembu	x	1				www.bulembu.org
	Cantonese fast food	Mbabane				1		
	Chesa Nyama	Mbabane				1		
	City Court Guest House	Mbabane	x	1				www.citycourt.co.sz
	CJ's Fast Food	Nhlangano				1		
x	Coffee Culture			1				
	Cubanora Café	Mbabane				1		
	Curry House Restaurant	Manzini				1		
	Debonairs Pizza	Manzini				1		
	Debonairs Pizza	Matsapha				1		
	Diamond Guest House	Nhlangano	x	1	1			
	Dreamland Fast Foods	Mbabane				1		
	Ecembeni Restaurant and Bar	Nhlangano				1		
	Eden life restaurent	Manzini				1		
	Egumeni Restaurant	Matsamo				1		
	Ekupholeni Garden Villas	Manzini		1				www.ekupholenigardenvillas.com
	Emafini Lodge	Mbabane	x	1				www.emafini.co.sz
	Emcengeni Restaurant	Manzini		1				
	Emphandzeni Hotel	Mafutseni	x	1	1			
	Enkhosi Guest House	Nhlangano	x	1				
	Esibayeni Lodge	Matsapha	x	3	2			www.esibayenilodge.com
	Eyami Restaurant	Buhleni				1		
	Fairview Guest House	Manzini	x		1			www.fairviewguesthouse.net
	Farm Lodge	Edwaleni	x	1	1			www.dwalenifarm lodge.co.sz
	Fish and Chips Inn	Manzini				1		
x	Foresters Arms Hotel	Mhlambanyatsi	x	1	1			www.forestersarms.co.sz
	Four Seasons Rest.	Mbabane				1		

HOTAES member	Establishment Name	Location	Within accommodation	Restaurants	Bars	Fast Food	Franchise	Website
	Futhi's Chicken Cottage	Siteki				1		
	Futhi's Chicken Cottage	Mbabane				1		
	Futhi's Chicken Cottage	Nhlangano				1		
	Futhi's Chicken Cottage	Manzini				1		
	Futhi's Chicken Cottage	Simunye				1		
	Futhi's Chicken Cottage	Matsapha				1		
	Futhi's Chicken Cottage	Hlatsi				1		
	Futhi's Chicken Cottage	Matata				1		
	Futhi's Chicken Cottage	Nhlangano				1		
	Futhi's Chicken Cottage	Hlatsi				1		
	Futhi's Chicken Cottage	Siteki				1		
	Galito's, Pizza Inn	Mbabane				1		
	Gallery Hotel	Matsapha		1	1			www.gallery-hotel.com
x	Global Village Guest House	Manzini	x	1	1			www.swaziglobalvillage.com
	Gogga's Nest	Matsapha	x	1	1			
	GPG Investment former Lismore Lodge	Big Bend	x	1	1			
x	Happy Valley Resort & Casino	Ezulwini	x	2	2			www.happyvalleyhotel.com
	Havilla Court	Manzini	x	1	1			
x	Hawane Resort	Hawane	x	1	1			www.hawaneresort.com
	Highlands Inn	Piggs Peak	x	1	1			
x	Hilton Garden Inn	Mbabane	x	1	1			www.hgi.com
x	Hlane Royal National Park	Simunye	x	1	1			www.biggameparks.org
	Home and Cakes	Mbabane				1		
	Hua-Yang	Manzini				1		
	Hwali Restaurant and bar	Mbabane		1				
x	KaMsholo Bushveld safaris	Nsoko	x	1	1			www.niselasafaris.com
	Kawloon Fast Food	Mbabane				1		
	Kawloon Fast Food	Manzini				1		
	Ken's Restaurant	Siteki				1		
	KFC	Ezulwini				1		
	KFC	Matsapha				1		
	KFC	Nhlangano				1		
	KFC	Manzini				1		
	KFC Manzini	Manzini				1		
	KFC Mbabane	Mbabane				1		
	King Pie	Matsapha				1		
	King Pie	Matsapha				1		
	King Pie	Mbabane				1		

HOTAES member	Establishment Name	Location	Within accommodation	Restaurants	Bars	Fast Food	Franchise	Website
	King Pie	Mbabane				1		
	King Pie	Manzini				1		
	King Pie	Manzini				1		
	Kudlakwemvelo Restaurant	Piggs Peak		1				
x	Lidwala Lodge	Ezulwini	x		1			www.lidwala.co.sz
	Lomphofu Restaurant	Mbabane				1		
	London Fish and chips	Mbabane				1		
x	Mabuda Farm	Siteki	x	1				www.mabuda.com
	Mafalala B&B	Siteki		1				
	Magadzavane Lodge	Mlawula	x	1	1			www.entc.org.sz
	Maguga Lodge	Piggs Peak	x	1	1			www.magugalodge.com
x	Malandelas	Malkerns		1	1			www.malandelas.com
	Malolotja Nature Reserve	Nkhaba	x	1	1			www.entc.org.sz
	Mananga Country Club	Tshaneni	x	1	1			www.manangalodge.com
	Manna Food Restaurant	Nhlangano				1		
x	Mantenga Lodge	Ezulwini	x	1	1			www.mantengalodge.com
	Mantenga Nature Reserve	Ezulwini	x	1	1			www.entc.org.sz
	Marios Pub grill	Manzini		1				
	Matsapha Inn	Matsapha	x	1				
	Mayoloza B&B and Backpackers	Ezulwini	x	1				
	Melrose Restaurant	Nhlangano				1		
x	Mhlume Country Club	Mhlume	x	1	1			www.mhlumeclub.com
x	Mkhaya Game Reserve	Siphofaneni	x	1	1			www.biggameparks.org
	Mlilwane Investments	Hlathikhulu				1		
x	Mlilwane Wildlife Sanctuary	Malkerns	x	1	1			www.biggameparks.org
	Mocambique Hotel	Manzini	x	1	1			
	Molly's House of Grills	Manzini		1				
x	Mountain Inn Hotel	Mbabane	x	2	2			www.mountaininn.sz
	Mugg & Bean	Ezulwini		1			1	
	Mvubu Falls Hotel	Malagwane	x	1	1			www.mvubufalls.com
	Nhlangano Casino Royale	Nhlangano	x	1	1			www.nhlanganocasino.org
x	Nkonyeni Lodge and Golf Estate	Nkonyeni	x	1	1			www.nkonyeni.com
	Ocean Basket	Ezulwini		1			1	
	Open House Boutique Hotel	Manzini	x	1				www.openhouseboutique.co.sz
	Opulence Lodge	Mbabane	x		1			
	Otentik Guest House	Mbabane	x	1				
	Palm Tree Guest House	Manzini	x	1				
	Park Hotel	Manzini	x	1				www.swaziplace.com/parkhotel
	Pasadas Restaurant and Bar	Mbabane		1				

HOTAES member	Establishment Name	Location	Within accommodation	Restaurants	Bars	Fast Food	Franchise	Website
	Phibs Guest House	Mbabane	x		1			
x	Phophonyane Falls Lodge & Nature Rserve	Piggs Peak	x	1				www.phophonyane.co.sz
	Phumlani Restaurant	Piggs Peak				1		
x	Piggs Peak Hotel & Casino	Piggs Peak	x	2	3			www.piggspeakhotelandcasino.com
	Plaza Tandori Restaurant	Mbabane		1				
x	Ramblas Restaurant		x	1	1			
	Reno Restaurant	Nhlangano				1		
	Rest Camp Lodge	Manzini	x	1	1			www.restcamlodge.com
	Riverside Hotel	Big Bend	x	1	1			
	Roadside B&B	Lavumisa	x	1	1			
	Run' Fire Garden court	Mbabane	x		1			www.runinfire.takagogo.com
	Sambane Restaurant	Malkerns		1				
	Sheba's Rock Spur	Ezulwini		1				
	Shewula Mountain Camp	Shewula	x	1				www.shewulacamp.com
x	SibaneSami Hotel	Ezulwini	x	1	1			
	Sibebe Rock Spur	Mbabane		1			1	
x	Simunye Country Club	Simunye	x	1	1			www.simunyecub.com
	Siteki Hotel	Siteki	x	1	4			www.sitekihotel.co.sz
	Sobantu Guest Farm	Mnyokane	x	1	1			www.sobantu-swaziland.com
	Sondzela Backpackers	Malkerns	x		1			www.biggameparks.org
	Steers and Debonairs	Mbabane				1		
x	Sugar Snap Café			1				
x	Summerfield Botanical Garden & Exclusive Resort	Nokwane	x	2	2			www.summerfieldresort.com
	Sundowners Lodge	Mahlanya	x	1	1			www.sundowners.co.sz
	Swazi Oak Lodge	Mbabane	x	1				
	Tambankulu club & Guest House	Tambankulu		1	1			www.tambankulu.co.za
	Tandori Express	Manzini				1		
	Tandori Express	Manzini				1		
	Terrace African Cuisin Rest.	Mbabane				1		
x	Tfutjana Mountain Resort	Mkhondvo	x	1				
	The Aviator	Manzini				1		
x	The Calabash Restaurant	Ezulwini		1				
x	The George Hotel	Manzini	x	2	3			www.tgh.co.sz
x	The Grill Group (PTY) LTD			1				
	The Lodge	Mbabane	x		1			
	The Place	Mbabane	x	1	1			www.theplaceswaziland.com
x	The Royal Villas Hotel	Ezulwini	x	1	1			www.royalvillas.co.sz

HOTAES member	Establishment Name	Location	Within accommodation	Restaurants	Bars	Fast Food	Franchise	Website
	The Unity Guest House	Mbabane	x		1			
	Timbali Lodge	Ezulwini	x	1	1			www.timbalilodge.co.sz
	Tio-Ze Restaurant & Motel	Malindza	x	1	1			
	Tums Water World Hotel	Sidvokodvo	x	1	1			
	Ubombo Country Club	Big Bend	x	1	1			
	Umcwembe Braai	Manzini				1		
	Umcwembe Braai	Manzini				1		
	Umushi Wenkosazana Spar Boutique	Forbes Reef	x	1	1			
	Ursel Guest House	Manzini	x	1				
	Vakasha Lodge	Siphofaneni	x	1	1			https://vakasha-lodge.business.site/
	Valley View Lodge	Manzini	x	1	1			www.valleyviewlodgesd.com
	W K Restaurant and Fast Food	Nhlangano				1		
	Wendy's Lodge	Siphofaneni	x	1	2			
	Willows Lodge	Malkerns	x		1			www.willowslodgeswaziland.com
	Windsor Garden Guest House	Matsapha	x	1	1			
TOTALS				107	84	58	3	

Annex III: Eswatini - List of Documented Natural & Archaeological Touristic Assets of Regional and/or Global Significance (2022)

Note that this list consists of documented assets that the consultants managed to identify. Non-verified contributions from stakeholders of potentially valuable assets are listed at the end.

1. Biodiversity

With a land area of only 17,364 km² Eswatini exhibits a high diversity of ecosystem types that are home to biodiversity of global and regional significance, including a diverse array of plant and animal species – a notable proportion of which are rare or threatened.

2. Birding

BirdLife International has designated Malolotja Nature Reserve (in the North West) as one of Africa's Important Bird Areas (IBAs), as it supports a significant number of species that are Globally Threatened (9) or Near Threatened (14), and many others that are restricted by range or biome. Among Malolotja's 280 recorded species, special mention must first go to the blue swallow, a rare inter-African summer migrant – and major draw-card for birders – that breeds in only a handful of sites across southern Africa. Mlawula Game Reserve (in the North East) has about 350 recorded species of bird represents around 70% of Eswatini's total. Mahamba Gorge cliffs and Mantenga Falls have colonies of southern bald ibis.

3. Flora and Fauna

Malolotja Nature Reserve is home to several threatened species of flora and two threatened species of cycad; the Barberton and Kaapsehoop cycads (*Encephalartos paucidentatus* and *E. laevifolius*).

4. Reptiles

Malolotja Nature Reserve has an endemic Swazi thick-tailed rock gecko and near-endemic Barberton girdled lizard (*Cordylus warreni barbertonensis*).

5. Makhonjwa Mountain Range

This mountain range stretches from Badplaas to the south of Nelspruit in South, passing through the North West of Eswatini. It is listed in UNESCO as a World Heritage Site, but only the South Africa listing, not Eswatini. Rocks on the Makhonjwa Mountain Range, found in Malolotja Nature Reserve, are truly ancient and form part of what is known as the 'Archaean basement', which laid the very foundations of the African continent. Ngwenya, the Malolotja Valley and the high western ground, comprises rocks of the Swaziland Supergroup, which are among the oldest metamorphic rocks in the world.

6. Songimvelo-Malolotja TFCA

Malolotja Nature Reserve adjoins Songimvelo Game Reserve in South Africa, International transboundary ecosystem. and declared a Transfrontier Conservation Area.

7. Lubombo Transfrontier Conservation and Resource Areas (TFCA)

Encompasses a complex system of mixed landuse areas, including conservation, agriculture and community land between Mozambique, South Africa and Eswatini, covering an area of over 10,000 km².

8. Lubombo Conservancy

60,000 hectares, the largest conservation area in Eswatini encompasses Shewula Nature Reserve, Hlane Royal National park, Mlawula game Reserve, Nkhalashane Siza Ranch. The Lubombo Conservancy is, in turn, a vital component in the Lubombo TFCA.

9. Mkhaya Game Reserve

Sanctuary for endangered species, such as black rhino and sable antelope.

10. **Sibebe Rock, Mbabane**
Large granite monolith, 16,500 hectares with a half exposed granite pluton.
11. **Sheba's Breasts, Mantenga Nature Reserve**
Twin mountain peaks of Sheba's Breasts are said to have inspired the setting for Rider Haggard's classic 1885 novel *King Solomon's Mines* – the author having spent some time in the area.
12. **Mdzimba Mountains, Ezulwini**
Sacred ground hiding secret burial caves for royalty among its rugged boulderscape. Sentry families guard the caves by royal appointment.
13. **Nyonyane Mountain; Rock of Execution, Mlilwane Wildlife Sanctuary**
The spectacular Nyonyane Mountain peak is known as Executioner's Rock from the grisly fate that befell the condemned individuals once led to its summit many years ago.
14. **Mlembe, Piggs Peak**
The highest peak in Eswatini (1,862m)
15. **Mahlabashane Gorge, Mlawula Game Reserve**
Home to rare plants, endemic ironwood forests and uncommon birds.
16. **Kophola Cave System, Kophola Mountains**
A unique cave system formed by the Kophola River that flows underground between Msunduzi and Kophola Mountains, just off the Malagwane Hill. This is the only major granite cave system known in Southern Africa, and comprises a series of water-eroded chambers.
17. **Khabane Cave, Mlawula Game Reserve**
Valuable archaeological site and home to rare plants, endemic ironwood forests and uncommon birds.
18. **Siphiso Cave, Mlawula Game Reserve**
Valuable archaeological site
19. **Mantjolo Pool, Mbabane**
This is a sacred pool with National Monument status on the outskirts of Mbabane in an attractive rural setting. The level of the pool never varies, and it is sacred to the Mnisi clan.
20. **The Gap eSicancweni, Komati River below Maguga Dam**
An extraordinary geological feature where the wide expanse of the Komati River disappears into a narrow chasm of black rock only a few meters wide.
21. **Malolotja Potholes, Malolotja Nature Reserve**
Steep gorge and the extraordinary Potholes (deep circular pools) at Mahulungwane Falls before meeting the Nkomati River.
22. **Natural hot springs Mlilwane Wildlife Sanctuary, the Cuddle Puddle in Exulwini and at Lubomba.**
23. **God's Footprint, Ntonjeni in northern Eswatini**
This is giant imprint was left by the creator of the world according to traditional beliefs, or is the random result of erosion in granite according to geologists. The footprint it is still guarded by a regiment and celebrated in sacred Incwala songs. There are some faded Bushman paintings nearby, evidence that Bushman peoples revered the place.
24. **Lion Cavern, Malolotja Nature Reserve**
The Lion Cavern is the world's oldest mine, carbon dated at 43,000BC. The ancient mine was discovered in the 1960s by archaeologist Adrian Boshier, following reports of numerous

stone-age tools being found. This site is archaeologically very important and is on the tentative list for UNESCO World Heritage Site status.

25. **Malolotja Waterfall**, *Malolotja Nature Reserve*
Highest waterfall in Eswatini at 95 metres.
26. **Mantenga Falls**, *Mantenga Nature Reserve*
Eswatini's largest waterfall by volume, and also a sacred site. Home to a colony of Southern Bald Ibis.
27. **Nsangweni Rock Art**, *near Maguga Dam*
Best-preserved Bushman, or San, paintings in Eswatini.
28. **Groenpan Rock Art Site**, *Mlawula Game Reserve*
This is the only known non-Bushman painting site in the country. It is likely to have been painted by Tsonga peoples and used as a circumcision site before the end of the 19th century.
29. **Nyonyane Shelter**, *Mlilwane Wildlife Sanctuary*
An archaeologically rich cave with very faded Bushman paintings.

Potential additions:

30. **Stone Circles** – *no documented information to verify the authenticity*. Found in Montigny Forest in Mhlambanyatsi and the side of the Ngwenya mine, part of Malolotja, believed (by some) to be the oldest signpost in the world. Could be reminiscent of the Bokoni Tribe.
31. **Border Cave** – *Entrance in South Africa, yet extends into Eswatini*
A rock shelter in Lubombo Mountains near the border between South Africa and Eswatini. Border Cave has a remarkably continuous stratigraphic record of occupation spanning about 200,000 years

Annex IV: Eswatini Arrivals by Port of Entry (Inbound)

	2007	2008	2009	2010	2011	2012	2013	2014
Matsapha Airport	27,213	26,888	25,752	25,184	21,938	22,720	22,078	16,186
KMIII airport								4,878
Bulembu	5,481	7,116	8,833	11,312	8,528	6,918	7,920	9,577
Gege	11,937	10,861	11,639	12,087	12,339	12,441	11,490	11,289
Lavumisa	225,569	225,745	270,017	227,781	224,907	205,586	224,311	240,417
Lomahasha	138,703	121,384	124,642	99,140	86,719	69,006	45,611	47,684
Lundzi	2,166	2,243	2,106	3,086	5,182	2,718	2,229	2,332
Mahamba	111,125	106,989	115,823	115,342	112,737	106,702	107,062	111,613
Mananga	80,966	70,829	85,607	90 249	103,494	105,328	106,970	99,398
Matsamo	119,524	115,999	135,579	129,150	124,563	126,971	136,780	135,292
Mhlumeni	97,603	93,990	136,573	150,947	150,013	155,624	151,526	145,618
Ngwenya	327,478	325,818	341,017	370,341	365,081	360,073	382,874	405,169
Nsalitje	17,551	17,902	22,365	34,794	37,762	27,670	23,721	26,195
Sandlane	19,848	11,124	14,378	17,601	13,074	13,803	12,974	12,566
Sicunusa	44,927	49,112	49,619	55,519	62,029	62,937	63,257	56,407
TOTAL	1,230,091	1,186,001	1,343,950	1,342,533	1,328,366	1,278,497	1,298,803	1,324,621

	2015	2016	2017	2018	2019	2020	2021
Matsapha Airport	370	328	495	331	372	34	56
KMIII airport	19,532	20,053	19,600	19,188	18,658	3,619	5,266
Bulembu	9,055	9,482	7,823	6,383	6,768	1,683	1
Gege	11,406	12,035	10,433	9,334	12,209	2,359	0
Lavumisa	220,143	223,360	238,526	208,910	164,390	47,958	30,448
Lomahasha	39,445	68,929	83,627	84,201	74,310	40,234	28,861
Lundzi	2,051	3,639	5,134	3,475	3,058	403	0
Mahamba	106,790	110,520	113,225	113,983	117,037	35,618	25,806
Mananga	88,085	81,214	88,901	103,665	116,002	29,404	14,292
Matsamo	126,360	122,385	138,421	134,639	152,918	33,564	11,741
Mhlumeni	127,486	131,462	129,814	114,977	81,211	15,584	2,612
Ngwenya	407,733	399,035	423,918	394,787	395,619	121,345	91,622
Nsalitje	20,675	17,284	16,524	15,093	13,109	1,784	0
Sandlane	14,107	20,922	20,244	21,214	19,435	2,455	0
Sicunusa	62,605	57,939	45,956	47,073	50,424	9,303	0
TOTAL	1,255,901	1,278,587	1,342,641	1,277,254	1,225,520	345,348	210,705

Annex V: List of Destination Management Companies & International Operators Associated with Eswatini

Destination Management Companies	South African Operators that make up the DMC and use Eswatini			International Operators			Type of tourist	
Tourvest www.tourvestdm.com	Sense of Africa www.senseofafrica.com	Not on website as destination		Zuid-Afrika Riesen Syd Afrika Resor www.zuid-afrikareizen.be	Not on website as destination Not on website as destination		Belgium	Swedish
Cullinan Group www.cullinan.co.za	Thompson's Africa www.thompsonsafrika.com	Not on website as destination Not on website as destination, but was previously; bypass now, since Covid		Follow Me to Africa www.followme2africa.com			UK	
	Springbok Atlas www.springbokatlas.com			Travel Bag www.travelbag.co.uk	Not on website as destination Not on website as destination		UK	
	Follow Me 2 Africa www.followme2africa.com			Trail Finders www.trailfinders.com			UK	
Amazing Africa www.amazing-africa.co.za	Highline Travel and Tours www.highline.co.za	Feature on website as a destination Feature on website as a destination		Djoser www.djoser.nl			Dutch low budget	
	Amazing Africa www.amazing-africa.co.za						German Mid-range	
Akilanga DMC & Events www.aaa-dmc.com	Akilanga www.akilanga.com	Not on website as destination Not on website as destination		Kuoni www.kuoni.co.uk	Not on website as destination		French <i>UK based operator</i>	
	African Eagle www.africaneagle.com						French	

Destination Management Companies			South African Operators that make up the DMC and use Eswatini			International Operators			Type of tourist
Diamond Travel	www.diamond-travel.com		Go Tourism	www.go-tourism.com	Not on website as destination	Safran RP	www.safranrp.com	Not on website as destination	French
						Travelmediate	www.travelmediate.com	Not on website as destination	
Private Safaris	www.privatesafaris.com	Feature on website as destination							
African Ample Assistance (AAA)	www.aaatravelafrica.com	Feature on website as destination				Baobab			Dutch low budget
						TUI	www.tui.co.uk	Not on website as destination	
						Krause Travel	www.krousetravel.com	Not on website as destination	
			Live the Journey	www.livethejourney.co.za	Not on website as destination	Evolve			Belgium
Fairfield Tours	www.fairfieldtours.com					Fox World Travel	www.foxworldtravel.com	Not on website as destination	Dutch and German Belgium
						Evolve			
Ilanga Travel	www.ilanga.co.za								German
			Absolut Tours	www.absoluttours.com		Studiosus	https://www.studiosus.com	Not on website as destination	German
									German
			Jenman Safaris	www.jenmansafaris.com	Not on website as destination				German
African Travel Concept	www.atctravel.co.za	Not on website as destination	Amazing Africa (also DMC as listed above)	www.amazing-africa.co.za	Feature on website as destination	TUI	www.tui.co.uk	Not on website as destination	Western European

Destination Management Companies	South African Operators that make up the DMC and use Eswatini		International Operators	Type of tourist
	Terra Nova	www.terra-nova.co.za	Not on website as destination	German
	Thompson's Africa (also part of the Cullinan Group as listed above)	www.thompsonsafrika.com	Not on website as destination	German, Dutch, French
	Go Vacation	www.go-vacation.co.za	Not on website as destination	German
	Egoli	www.egolitours.co.za	Feature on website as destination	German

Annex VI: What Tourism Operators Want From HOTAES

The following information was compiled from responses by 24 operators to a questionnaire sent by the Consultants to 87 HOTAES members in May/June 2022.

TRAINING

1. Organise workshops/training for industry players - hospitality related items.
2. Provide proper documents to guide members on the issue of Labour Law for the industry.
3. Organise training professionals to run courses for establishments on subjects like: Customer Care, Health and Safety, Food handling and safety.
4. Up to date information regarding all administrative requirements to run a tourism related business in Eswatini.
5. Educate members on current global trends and practices.
6. Provide skilled and professional training centres for chefs and all hospitality personnel.

REPRESENTATION & NETWORKING

1. Maintain networking and buoyancy within the industry
2. Establish an operational office with key full-time employed team players to drive the HOTAES mandate in collaboration with ETA to avoid duplicating services
3. Work closely with Local Municipalities to align tourism requirements for tourism and hospitality industry
4. Network with tourism agencies regionally, in Africa and abroad
5. Intentionally create a platform for members to synergize nationally from the various fields: accommodation, restaurants, transport providers, tourist guides, travel agencies, border posts, airlines, tour operators. This could be held once a year for a start.
6. Work closely with ETA to avoid duplicating services and so maximize on proactive actions
7. We don't understand the difference between HOTAES and ETA. Who is responsible for what, and why is there a differentiation? What are we paying for with each, and what do we get in return for each? Who is accountable for what? We hope for clarity on this.
8. Networking – with other members of industry in Eswatini with, members of industry from the region.
9. Opportunities – Many times companies put out tenders to use a national infrastructure. To be kept abreast and advocate or participate in being able to tender sell Eswatini as a destination. (Tour operators will put out a tender to use a destination for tourists on charter etc).
10. Information - Tourism is ever evolving and markets are changing. Therefore, to be kept abreast of new markets and opportunities that may come the operator's way
11. Information - Security situations (Current political unrest and what to expect at certain times of the year etc.)
12. Supplier expo - new technology, products etc. available to the industry.
13. To always reach out to members to find out how to help with their struggles.

STATISTICS

1. Statistics of quarterly number guests from hotels, lodges, guest houses, B&B's that are officially registered with HOTAES. Guest / visitor feedback can be shared so that we can all improve our service.
2. Tourism trends and other useful information.

QUALITY CONTROL

1. Assist tourism industry members in how to enter the industry, best practices, networking and growing our tourism businesses.
2. Organise site inspections with the hospitality sector for tour operators and tour guides. This make it easier for us to package and sell their products.
3. Standardize minimum level of service in restaurants, accommodation, tourist guiding, transport... for its members.
4. Align HOTAES into any business tourism and hospitality registration, so that a person may not operate a tourism service unless he/she is also a member of HOTAES and adheres to the HOTAES standard of service based on his field.
5. HOTAES should develop an industry operational handbook and help regulate as well promote the Industry in Eswatini. I believe an Industry handbook would not only serve as a guideline for Industry Operations but further encourage professionalism within the Industry.
6. The hospitality industry as a whole lacks consistency and portability in training models and skill certification. Many employers provide internal training programs for entry level workers, which makes it difficult to monitor the contents of training and skill acquired.

ADVOCACY & MEDIATION

1. Lobby on behalf of the Tourism Industry for fair regulations, consistent implementation of regulations and registrations, effective marketing, relative marketing, etc.
2. Perform the advocacy role, ensuring our Government Ministries are effective and supportive and that Tourism Industry voice is heard, our collective requirements are met and concerns addressed.
3. Voice concerns to Government
4. Bold Advocacy of local hospitality and tourism industry to government
5. Engage government on barriers to tourism
6. Advocacy on labour law, bed levy, registration, against any law be proposed that is negative to business, Food handlers test, etc., etc.
7. They have been a strategic body to belong to, for all aspects of our business, also to enable us to get permits for all our buses and cars
8. To be involved in making rules and laws in tourism industry
9. They should have a permanent office so one can call with any questions and get advice and they can lobby on our behalf. Even in areas of business where we face numerous challenges
10. Help members on the issue of high bed levy by talking to Ministry concerns.
11. Take the lead in championing the tourism mandate with ETA being a support tool to this end. In other words, ETA should consult and work hand in hand with HOTAES.
12. To act as an intermediary between operators in Eswatini
13. Continue being an advocate for hospitality and tourism in the country.

MARKETING & INFORMATION

1. Provide information in terms of B2B opportunities mostly in international trades.
2. Spearhead local tourism exhibitions and national campaigns
3. Grow domestic tourism as it continues to promote inbound tourism.
4. We'd like to see: cost-effective collaboration and unification within the tourism sector and international and regional marketing for Eswatini.
5. Co-ordinating travel shows, opening opportunities for showcasing Eswatini
6. Enabling the role players to control their destiny where all people can be involved and have a say (have suggested perhaps a website showcasing everyone, with links for booking direct with owners), perhaps with a small fee to cover costs of such a website.

7. Perhaps designing “routes” - adventure route, food route, scenery route, wildlife route, craft route, etc., so that travellers stay longer than a day.
8. Establishing Eswatini as a destination in its own right.
9. Perhaps on the information dissemination, HOTAES could provide a database of all tour operators using the country and their target markets.
10. Collective advertising for small to medium businesses.
11. Perhaps on the information dissemination, HOTAES could provide a database of all tour operators using the country and their target markets.
12. Support in advertising.
13. To market all the establishments registered under HOTAES.
14. Marketing – Trade shows, news on current and future trends in Tourism and hospitality, Networking opportunity with people who decide where to travel and what should be offered (More than tour operators less than individuals).
15. Marketing and working with ETA on layouts and organising of travel shows, general information on changes to legislation, etc.

