MINISTRY OF TOURISM, ENVIRONMENT AND CULTURE

REVIEW OF TOURISM POLICY AND LEGAL FRAMEWORK AND DEVELOPMENT OF A

NATIONAL TOURISM MASTER PLAN

National Tourism Master Plan

FEBRUARY 2019

Ministry of Tourism, Environment and Culture

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Maps

Abbreviations and acronyms

AfDB	African Development Bank	LHDC	Low Human Development Country	RT	Responsible tourism
CBL	Central Bank of Lesotho	LHHA	Lesotho Hotels and Hospitality Association	SADC	Southern African Development Community
CBT	Community based tourism	LNDC	Lesotho National Development Corporation	SAT	South Africa Tourism
DMCs	Data Management Company	LRA	Lesotho Revenue Authority	SATSA	Southern Africa Tourism Services Association
DMO	Debt Management Office	LSL	Lesotho Loti	SCP	Sustainable consumption and production
EDSP	Economic Diversification Support Project	LSM	Living Standards Measure	SDGs	Sustainable Development Goals
EIA	Environmental Impact Assessment	LTC	Lesotho Tourism Council	SIDS	Small Island Developing States
FDI	Foreign direct investment	LTDC	Lesotho Tourism Development Corporation	SME	Small and medium-sized enterprises
GDP	Gross domestic product	LTIC	Lesotho Transport Infrastructure and Connectivity Project	SWOT	Strengths, Weaknesses, Opportunities and Threats
GHG	Greenhouse gas	MDGs	Millennium Development Goals	TMP	Tourism Master-plan
GIS	Geographic information system	MICE	Meeting, incentives, conferences, events	TOR	Terms of reference
GoL	Government of Lesotho	MoU	Memorandum of Understanding	TSA	Tourism Satellite Accounts
GPS	Global Positioning System	MPWT	Ministry of Public Works and Transport	TZ	Tourism Zone
I-PRSP	Interim Poverty Reduction Strategy Paper	MTEC	Ministry of Tourism, Environment and Culture	UK	United Kingdom
ICAO	International Civil Aviation Organization	MTI	Ministry of Trade and Industry	UN	United Nations
ICT	Information and Communication technology	NP	National Park	UN-HABITAT	United Nations Human Settlements Programme
IMF	International Monetary Fund	NSDP	National Strategic Development Plan	UNWTO	United Nations World Tourism Organization
ITB	International Tourism Bourse	NTA	National Tourism Administration	USA	United States of America
ITC	International Trade Centre	NTMP	National Tourism Master Plan	VAT	Value-added tax
JBCC	Joint Bilateral Commission for Cooperation	NTO	National Tourism Organisation	VCM	Value Chain Matrix
JMAs	Joint Marketing Agreements	OBFC	One-Stop Business Facilitation Centre	VFR	Visiting friends and relatives
KPI	Key Performance Indicator	OSS	One-Stop Shop	VoIP	Voice over Internet Protocol
KZN	KwaZulu-Natal	OTAs	Online Travel Agencies	WB	The World Bank
LBS	Lesotho Bureau of Statistics	PMU	Project Management Unit	WEF	World Economic Forum
LCT	Lesotho Council for Tourism	PPP	Public Private Partnership	WHS	World Heritage Site
LDC	Least Development Countries	PR	Public Relations	WTM	World Travel Market
LED	Local Economic Development	PRSP	2005-2008 Poverty Reduction Strategy	WTTC	World Travel & Tourism Council
LHDA	Lesotho Highlands Development Authority	RSA	Republic of South Africa		

Executive summary

TOURISM – A UNIQUE OPPORTUNITY

The timing is right to make a choice for tourism to become the strategic spearhead to move Lesotho to new more favourable horizons in the coming years. Moreover, there is ample evidence that tourism is unique in that it is cross-cutting; impacting on most, if not all, sectors.

Thus, tourism has the potential to facilitate solutions to a stagnant economy and unemployment. In other words, tourism can stimulate economic growth and create the jobs that are so crucial to the economic and social welfare of Lesotho.

For the economic power of tourism to be unleashed in Lesotho and the momentum of growth to gain traction such as to assist the Government to use tourism as part of its economic development priorities, a number of well documented recommendations; in the following texts and in Annex A, suggestions and actions must be taken – acted upon – urgently.

Anything less will risk not realising the long-term vision of a vibrant and profitable tourism industry diversified across the country and providing meaningful employment; especially to the future population – the youth of today!

The National Tourism Master-plan (NTMP) envisages three growth scenarios that may reasonably be expected to achieve if the GoL, collaboratively but led by the MTEC, implements the growth strategies in section 6. The High Growth Scenario (→ see section 5) is the goal. Achieving that requires a sea change at Government levels in approach, commitment, resourcing; matching stated priorities and commitments with fiscal appropriations in budgets and, overall, taking responsibility for tourism.

In the spirit of building a strong nation and a plural society, an apolitical stance is critical as is a collaborative and cooperative approach.

Lesotho has a unique opportunity, if the Government is willing, to take up the challenge to reposition itself in a manner that could bring it to a competitive position in SADC and in the product choices of travellers and a viable investment choice for FDI.

There is a vibrant, real and powerful **Tourism Economy** that can play the central role in helping Lesotho to flourish and it is evident, to a greater or lesser proportionate degree – across all Government Ministries and Departments.

Approached correctly, Tourism is one **Integrated Economic System** – making substantive social, economic and environmental contributions that are very necessary, structurally, to economic success, very responsible to the citizens of the Nation and that can bring wealth creation across many sectors and communities. It can both protect and enhance the country's most valuable resources that provide the most motivation to travel to, in and around Lesotho; its people and nature/wildlife, at the same time, generating valuable export earnings and Foreign Direct Investment.

Tourism touches every sector and segment of commerce, infrastructure, investment, labour training and supply, communications, utilities (power, water, sewage), agriculture, primary industry, health and welfare, education, youth development, small business, women's affairs, mining, customs & immigration – and so on. All Government and private sector stakeholders are 'in' tourism – in some form and to some degree – and, thus, must contribute – play their part – in some form or other, collaboratively. And, in so doing, pay their way – in all forms of taxation – generating major additional income for the Government.

The Government: working in harmony, cross-sectorally, generating greater economies of scale by fiscal and other resource alloc-ation and collaboration, to provide the enabling environment, in which tourism activity exists.

The private sector: buying and selling goods and services across the spectrum of the supply chains – and both - employing people as well as marketing the Nation – for all its attributes.

The whole is greater than the sum of its parts!

It is so critical, to assist National economic recovery, that this is not only understood but also acted upon; in planning and resource allocation across all Ministries, Departments and Parastatals in the Value Chains. Failure to do this must not be an option.

The NTMP concurs with previous studies and strategies developed for and by the Government that a number of constraints to growth are evident and persisting as summarized in Section 2. There is an imperative, for Government, to lead the process and stimulate the private sector to 'drive' the commercial side of the industry. If addressed, the High Growth Rate scenario (→ see section 5) is possible. In the interim, solutions to the constraints need to be systematically planned for and implemented.

THE APPROACH

No form and concept of economic development achieves integrated and holistic development aspirations better, especially for poor and marginalised communities, harmonising and balancing the Social, Economic and Environmental aspects, than a **Responsible Tourism** concept (→ see section 3.2). This form of approach and concept fully underpins sustainability of development and ensures that communities in general, and their economic needs, are at the forefront of the development agenda -

while, at the same time, developing and diversifying the product along 'demand' and consumer trend lines.

When systematically planned and implemented, Responsible Tourism enterprises contributes very substantially to GDP; 70%-80% of economic activity is small business and, in Lesotho, may be much higher, considering the rampant informal economy. It also utilises all enabling environment services that Government provides – and – disburses this across the social spectrum, across the Nation and balances the Social, Economic and Environmental responsibilities of both Government and commerce. It takes responsibility for making better places for people to live and better places for people to visit – whether for business or pleasure or both and delivers independent supply of goods and services.

Developing tourism related enterprises sustainably induces a sense of worth, a sense of recognition and a degree of economic independence – a sense of pride in the knowledge that supply of goods and services is economically viable and, that paying taxes can be a good thing in that it provides for funds to the exchequer to build and maintain vital infrastructure that is critical to market access, for them. This, in turn, contributes substantially to livelihood change and poverty reduction.

A National Government commitment to this concept is very attractive to investors as there is a strong and rising trend in tourist demand for 'product' that has a nature base but also has 'people' and their livelihoods as integral components of that product. Private entrepreneurs working in harmony with the Government can invest in confidence and be 'proud' to offer such product in the origin markets. Success in this perfectly meets the Government's Policy and distributes tourists and their expenditures more widely around the country, and thus wealth creation in the communities.

Three growth scenarios have been calculated in section 5, that are directly related to the ability of the Government and its Tourism Industry stakeholders to effectively implement the NTMP. If properly, resourced and effectively implemented, it will provide the impetus to generate substantial additional jobs in the hospitality side of the industry, an induced effect across the indirect tourism economy that may mean a multiplier of two or three and incremental revenues that would propel the whole integrated Tourism Economy to sustainable levels, by 2028 and beyond.

The Tourism Fund envisaged is critical to this approach as it will allow the GoL, in general, the MTEC and, the LTDC specifically, with the LCT when it comes back on stream as well – working in harmony, to drive the implementation of this NTMP forward.

THE VISION

The vision (→ see section 4.2), towards which the implementation of the NTMP will strive, is to develop an inclusive, robust and vibrant Tourism Economy with the Lesotho stakeholder community unifying behind a responsible approach to development, conservation and promotion. The aim will, thus, see the country establish itself as a destination of choice, in SADC, for niche experiences not available elsewhere, celebrating its extraordinary natural assets, cultural and historical heritage. It is critically important for Lesotho to position itself in the Southern African context, as this is where all its competitors are active.

The mission (→ see section 4.3), whilst being complex, addressing as it must a range of sectors and collaborative efforts and prioritisation of the wider sector, must be for the MTEC to lead the industry towards: developing and delivering market oriented products and services though; policy, fostering public private sector collaboration, sustained efforts towards stimulating investment in diversifying across the Tourism Economy and ensuring this all happens under the overarching concepts of Responsible Tourism.

Against this backdrop, the general objective of the NTMP (→ see section 4.4) is to establish the overarching guide to the development of Tourism in Lesotho by providing direction to product development and diversification, preservation of nature, culture and heritage, community participation, involvement of the private sector, infrastructure development, and marketing and promotion strategies.

The proposition is anchored in "Lesotho: The Kingdom in the Sky". It proposes that Lesotho has more to attract and 'hold' existing and potential visitors longer and, thus, not only to disperse visitors; domestic and international, along with the economic and social benefits that this strategy brings, but also induce greater spending and sustainability for job retention, new SMEs and associated jobs, especially for the youth whom are the tourism industry of the future.

The implication is that there is 'market ready' product by which 'the Kingdom in the Sky' is practical. To a degree this is true, though not entirely. The Government, through the MTEC, has

identified the requirement for a clear structure and road map to guide all future development – a National Tourism Master Plan (NTMP). The NTMP would, when systematically implemented over time, facilitate wider distribution of product around the country and at the same time diversify the product range to better accommodate evidenced trends in consumer behaviour and demand.

This is that plan and it is now the core reference point for integrated development in the future. This Road Map will guide Lesotho, in an iterative and regularly updated format responsive to emerging and as yet unknown influences, to a well structured and systematic way of taking the industry forward to 2028 and beyond.

STRATEGIC DEVELOPMENT FRAMEWORK

The Tourism Sector Diagnostic for this NTMP investigated and tested Strengths, Weaknesses, Threats and Opportunities facing Lesotho in the immediate and long term. The result has revealed a number of strategic priorities that were captured in the prioritised and consolidated National SWOT presented in that key informative analysis and presented here in section 2.

The process led to a series of strategic recommendations across seven mutually exclusive components – seven strategic 'pillars'. These are priority recommendations of major significance and importance to both immediate and future development and operational aspects and, as such, have emerged as the core strategic pillars of all planning and captured across the Policy and the NTMP.

The strategic recommendations are organized in seven destination development imperatives for the Strategic Development Framework of this NTMP. These are:

1. Ensure an appropriate institutional and legal framework
2. Improve visitors' experience
3. Improve and expand the product base
4. Provide the necessary infrastructure
5. Marketing and Branding of the Destination
6. Create a favourable business and investment climate
7. Ensure environmental and social sustainability

Section 6 is structured accordingly and aligns with the related Tourism Policy.

MARKETING STRATEGIES

Lesotho is blessed with natural beauty based on the distinctive Maluti Mountains, the highest mountain range in Southern Africa and, along with the cultural heritage of the people in pristine environments, makes for a situation that rivals any African country, in the sense of niche soft adventure and completely unique offers in Southern Africa. The TMP outlines and details these in sections 6.3 and 6.5.

Tourism natural resources include the scenery of the mountains and highlands, various national parks and nature reserves, impressive rivers, lakes, waterfalls and hot springs, cave formations and a variety of flora and bird species. The mountainous topography and associated features provide for the potential of Lesotho to be known as a very special destination for soft adventure with an extremely wide variety of adventure experiences in a small and easy to get around country. Niche adventure sports and activities such as pony trekking, off-road driving, motorcycling, mountain biking and quad biking, hiking and trekking, mountain climbing, abseiling, para- and hang-gliding, kayaking, white river rafting and canoeing are major assets. They are also the basis for developing not only stand-alone product but also events that can attract a much higher volume of visitors spending longer in the country and, thus, leaving behind foreign exchange and better employed people.

Lesotho's rich culture and heritage, in the spectacular setting of the mountains, is arguably a major complementary and highly valuable tourism asset. With the consumer motivation trends very clear, these are a feature of opportunities for product development, investment and marketing. The many San rock paintings dating back 2,400 years, the missionary history, legacies of Chief Moorosi and the legendary King Moshoeshoe as displayed at Thaba Bosiu and sites of religious and colonial history, provide for fascinating tourism storylines and the basis for the development of thematic trails, such as those already identified by LTDC, along the priority tourism routes identified by the NTMP (→ see map 4). The traditional blanket dress code, wool and mohair creations, basketry, the Basotho pony trekking culture, initiation traditions and interesting cultural festivals are potentially valuable tourism attractions.

In addition to the natural and cultural tourism resources, unique and significant man-made attractions such as the impressive dams and hydro-power technologies of the Lesotho Highlands Water Scheme and the unique AfriSki resort are important tourism attractions.

Despite these assets, the sector's economic contribution remains low. Direct tourism receipts comprise only 1.5% of GDP, the country receives an average of only US$31 in direct expenditure per visitor, and tourism receipt per capita is only US$18 compared to US$150 in South Africa and US$164 in Namibia[1]. Leisure tourists stay on average only 3.2 nights and the industry is highly seasonal in nature. The average bed occupancy rate is as low as 20%. This must change – and the only practical way it can will be for the collaborative approach, detailed in section 6.1.5, to be implemented as a National Government initiative, facilitated in no small measure through the Finance and Budgetary Committee.

Regarding overall competitiveness, Lesotho can, by methodically addressing the implementation of the NTMP, climb higher on the WEF Tourism Competitiveness Index and, while the country offers a safe, affordable and unpolluted travel experience, much work will be required, through the collaborative measures clearly detailed in the NTMP, to improve tourism infrastructure, services, customer services, attractions and business conditions for it to compete on a solid footing with other destinations in the region.

To improve the quality of life of the Lesotho population with tourism identified as a key instrument in achieving this end

To proactively facilitate the growth of an inclusive, competitive and sustainable tourism economy

1	2	3	4	5	6	7
ENSURE AN APPROPRIATE INSTITUTIONAL AND LEGAL FRAMEWORK	IMPROVE VISITORS' EXPERIENCE	IMPROVE AND EXPAND THE PRODUCT BASE	PROVIDE THE NECESSARY INFRASTRUCTURE	MARKETING AND BRANDING OF THE DESTINATION	CREATE A FAVOURABLE BUSINESS AND INVESTMENT CLIMATE	ENSURE SUSTAINABILITY ACROSS THE WHOLE STRATEGY

The seven pillars of the NTMP strategic framework

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[1] Source: SADC Yearbook andUNWTO Barometer.

Although the majority of tourists to Lesotho arrive by road, the high flight costs and limited flight options constrain the flow of overseas visitors, who generally face time constraints when on holiday.

Lesotho, remarkably, remains largely unexplored by both South African and overseas travellers and tourism is largely concentrated around a limited spectrum of activities and at a small number of locations. In tourism experiential terms and access, Lesotho is seen essentially as a domestic destination by South Africans. This is a major market asset for Lesotho and 'demands' concerted, targetted, efforts and resource allocation to 'unlock' that potential.

While general sightseeing is a common activity among all visitors, South Africans are inclined to participate in self-organised adventure activities like 4×4 trekking, mountain biking and skiing, while overseas visitors mainly visit iconic, well-publicised natural, cultural attractions where they are able to participate in soft-adventure attractions and activities.

A key challenge for Lesotho will be to present the experiences on offer in a coherent and enticing manner for its various target market segments and LTDC has made some progress in identifying and plotting nine suggested routes throughout Lesotho. Product development and investment recommendations are reflected clearly in the NTMP and will be integrated into Marketing Strategies. This will be supported by the innovative QUAL-Star accommodation grading system as a major asset to showcase the range and quality of accommodation around the country.

The tourism brand identity, showcased in section 6.5.1 is a major asset and worthwhile investment in positioning and reinforcing the basis for marketing Lesotho as a modern, upbeat environmental tourism destination rooted in unique and strong cultural traditions.

A collaborative and collegiate approach along with investment in focused up-skilling, capacity and financial resources are urgently required to effectively market the destination.

A SPATIAL CONCEPT – TOURISM DEVELOPMENT ROUTES, NODES AND ZONES

The development strategy set forth by the NTMP is spatially transcribed (→ see section 7) in a structure based on strictly interrelated elements of **gateways**, the points of access to the country, the tourism **routes** (→ see map 4), portions of national transport systems strategically earmarked for in-country circulation of tourists, and priority tourism **nodes** (→ see map 6), focal areas that have been strategically identified in a number of locations around the country. They identify potential product development opportunities that can generate small to medium investments as well as larger, more ambitious, projects to diversify the product and help spread the benefits more equitably.

Furthermore, the Spatial development framework identifies a set of tourism **zones** (→ see map 7) – areas earmarked for their suitability to accommodate tourism development.

Very substantial employment and SME opportunities in the value chain are, thus, exposed, especially for future generations, as it ensures access to markets and, also, access from the markets; in the NTMP context – tourists – the most critical ingredients in sustainability of development.

Of critical and utmost importance is the ability of the Government to enact the various commitments it has made, elaborated in the NTMP.

The NTMP presents, in some detail, two major sets of analyses to guide the process: a National SWOT presented in table 1 (page 14) and a set of growth strategies, presented in section 6, covering seven structural "pillars" fundamental to cross–sectoral collaborative effort; these strategies, once achieved, will produce positive outcomes under three Growth Scenarios 2018–2028. The Low Growth Scenario presents a "business as usual" baseline scenario; the Medium Growth Scenario assumes that recommended NTMP growth strategies are implemented; the High Growth Scenario assumes that recommended NTMP growth strategies are implemented and the environment for doing business improves to equal that of leading countries in SADC.

It is essential, given the broad nature of tourism, in the context of an integrated Tourism Economy, that a detailed programme of implementation is developed of not only the Tourism NTMP but also any other master plans, the National Transport Master Plan for instance, and any other vital Policy and/or Structural adjustments required for a robust and collaborative and integrated approach, that overcomes the 'silo' approach clearly elucidated in the 2018/9 budget speech.

Inevitably, any implementation at local area level, must have the national enabling environment to guide it in order to ensure national coherence of physical planning, infrastructure develop-

ment, community integration and adherence to national product and marketing priorities. And they must address the most critical components of successfully integrating those priorities in such a way that all those involved in the sector, directly and/or indirectly across the Value Chain of the Tourism Economy do so in harmony, collaboration and co–operation.

The Tourism Areas Development Plans, that will be developed to operationalize the NTMP, will present carefully conceived and developed plans for short, medium and long range attention that will allow and facilitate collaboration between and with Government, Parastatal and Private Sector to systematically implement around the country.

They will allow the National and Local Authority Governments across complementary sectors, along with the private sector, to make informed judgements for priority development options, in the most efficient and methodical manner. These Tourism Area Development Plans and accompanying Action Plan are intended to facilitate specific focus in those areas not only of potential and demand related development opportunity but also of great need in terms of SME development and youth business and job opportunities.

IMPLEMENTATION

The NTMP is designed on a time horizon of 20 years and divided in two 5-year short and medium term priorities and one 10-years long term priority, that will be reflected in the accompanying Action Plans (namely the Tourism Area Development Plans for five priority areas and the Tourism Action Plan). It is designed to be dynamic and to be updated annually as a rolling plan. Each update is to reflect apposite influences evident in Political, Economic, Social, Technological, Environmental and Legal advances or changes. Thus keeping the NTMP 'fresh', relevant and up-to date as the base reference guide for all entities, public and private. It will also be the tool that provides the rationale and base document to inform investors of the background to the rationale and motivation to invest in Lesotho.

Furthermore, the NTMP is designed to be completed by Tourism Area Development Plans for five priority areas and by a Tourism Action Plan to guide practical implementation.

1. Introduction

This NTMP document constitutes the fifth output of the masterplanning process and fulfils key sections of the TOR: *"Based on the diagnostic, develop effective and appropriate destination management (National Tourism NTMP) framework to support a sound, sustainable tourism development and promotion programme – the NTMP should focus on the following sectors: transport; accommodation; tourist activities; product development; tourism zoning; marketing and promotion; institutional framework; statistics and research; legislation and regulation; and quality standards of tourism services."*

For the preparation of this report the full team has been mobilised for individual and integrated tasks backstopped by the ground team in Rome. The NTMP has been informed by not only the substantial findings of previous work, substantiated in the "Tourism Sector Diagnostic (May 2018)", individual and small group meetings and discussions with key stakeholders in Lesotho by the Lesotho team during the 6 months leading into October, but also by very substantial email discussions and exchanges of data between individual team members, MTEC and LTDC officials.

Collaboration between the team and the PMU at the Ministry of Trade and Industry in Lesotho has also contributed substantially to the data, detail and interpretation as has substantive discussions and workshops with private sector in South Africa – leading to a very comprehensive and detailed look at the, possible, future growth prospects and, critically, the various sectors requiring investment and the intensity by which this must be done to achieve long term growth aspirations. Additionally, Team members have conducted intensive interactions with many Industry and Government stakeholders to gain further insight and contemporary updates on apposite issues.

In this plan, Section 2 presents a summary of the extensive assessment that was carried out in previous stages of work. The full assessment is found in the report "Tourism Sector Diagnostic (May 2018)". It includes the final, consolidated National SWOT analysis (→ see table 1 in section 2.2).

Sections 3 and 4 further lay the ground for the NTMP describing a full set of strategic statements, including vision, mission and objectives, for the NTMP.

Section 5 describes three growth scenarios that have been drafted to explore the quantitative aspects of tourism growth, including tourist numbers, accommodation needs and employment. The low growth scenario (→ section 5.2.1) is a "business as usual" baseline scenario with continuation of growth patterns of recent years and in line with international growth projections. The medium growth (→ section 5.2.2) and high growth (→ section 5.2.3) scenarios assume different levels of implementation of the NTMP, Government investment in tourism and improvement of the doing business environment.

Section 6 presents the full NTMP strategy organized around seven strategic 'pillars' described in section 4.5. Each pillar is organized in subcomponents that are discussed in detail, based on the findings of the Tourism Sector Diagnostic and completed by a set of actionable strategic recommendations.

Finally, section 7 tackles the spatial dimension of tourism, presenting a spatial concept as the spatial transcription of the tourism development strategies described in section 6. It is based on a structure including the strictly interrelated elements of infrastructural gateways giving access to the country; tourism routes, portions of national transport systems strategically earmarked for

in-country circulation of tourists; priority tourism nodes, focal areas for potential product development opportunities; and a set of tourism zones earmarked for their suitability to accommodate tourism development.

This document is one of a 'family' of four essential strategic documents that are coherent, one to the other, and should be read in conjunction with each other.

Document	Purpose
Tourism Sector Diagnostic	Ensures that there is clear understanding of the actual situation on the ground to form the basis of planning process;
The Lesotho Tourism Policy	Provides overarching policy and cross sectoral linkages of Government commitment, responsibility and action
The Lesotho Tourism Act	Provides the legal framework for the implementation of the Policies
The Lesotho Tourism Development Master Plan 2018-2038	Guides the development of tourism in Lesotho for the future in a well planned and logical, pragmatic and realistic, market oriented, framework.

After the approval of this report, downstream work will include the development of Tourism Area Development Plans for five priority areas *("Identify five key Tourism Development Areas/Destinations and develop their Specific Development Plans", TOR)* and the development of a Tourism Action Plan *("Develop a consolidated Tourism Action Plan with clearly defined targets, cost estimates and timelines", TOR).*

2. Context, situation analysis and national SWOT

Fig. 1 – Lesotho high mountain landscape

The Tourism Sector Diagnostic presented the results of the first phase of work carried out by the consultancy team. The specific objective of that phase was to assess the current situation of tourism in Lesotho through a number of sectoral analyses that were presented in that report. The sectoral analyses clearly identified a number of issues and challenges that are hindering tourism development, as well as pointers to opportunities for Lesotho tourism. These have led to substantive recommendations in the NTMP.

This Section presents a summary of main findings of the tourism assessment. For further details, please refer to the report "Tourism Sector Diagnostic, May 2018".

2.1 Summary of findings

TOURISM CONTEXT IN GENERAL

Lesotho is blessed with natural beauty based on the distinctive geomorphology of the Maluti Mountains, the highest mountain range in Southern Africa. Tourism natural resources include the scenery of the mountains and highlands, various national parks and nature reserves, impressive rivers, lakes, waterfalls and hot springs, cave formations and a variety of flora and bird species. The mountainous topography and associated features provide for a variety of adventure experiences such as pony trekking, off-road driving, motorcycling, mountain biking and quad biking, hiking and trekking, mountain climbing, abseiling, para- and hang-gliding, kayaking, white river rafting and canoeing.

Lesotho's rich culture and heritage is arguably its most valuable tourism asset. The dinosaur footprints to be found at various locations, the many San rock paintings dating back 2,400 years, the missionary history, the legacies of Chief Moorosi and the legendary King Moshoeshoe as displayed at Thaba Bosiu, provide

for fascinating tourism storylines. The traditional blanket dress code, wool and mohair creations, basketry, the Basotho pony trekking culture, initiation traditions and interesting cultural festivals are potentially valuable tourism attractions.

In addition to the natural and cultural tourism resources, unique and significant man-made attractions such as the impressive dams and hydro-power technologies of the Lesotho Highlands Water Scheme and the unique Afri-ski resort are important tourism attractions.

Despite these assets, the sector's economic contribution remains low. Direct tourism receipts comprise only 1.5% of GDP, the country receives on average only US$31 in direct expenditure per visitor, and tourism receipts per capita are only US$18 compared

to US$150 in South Africa and US$164 in Namibia[2]. Leisure tourists stay on average only 3.2 nights and the industry is highly seasonal in nature. The average bed occupancy rate is as low as 20%.

Regarding overall competitiveness, Lesotho ranks low on the WEF Tourism Competitiveness Index and while the country offers a safe, affordable and unpolluted travel experience much work is required to improve tourism infrastructure, services, customer services, attractions and business conditions for it to compete on a solid footing with other destinations in the region.

Although the majority of tourists to Lesotho arrive by road the high flight costs and limited flight options constrain the flow of overseas visitors, who generally face time constraints when on holiday.

Lesotho remains largely unexplored by both South African and overseas travellers and tourism is largely concentrated around a limited spectrum of activities and at a small number of locations. While general sightseeing is a common activity among all visitors, South Africans are inclined to participate in self-organised adventure activities like 4×4 trekking, mountain biking and skiing, while overseas visitors mainly visit iconic, well-publicised natural, cultural attractions where they are able to participate in soft-adventure attractions and activities.

A key challenge for Lesotho is to present the experiences on offer in a coherent and enticing manner for its various target market segments and LTDC has made some progress in identifying and plotting 9 suggested routes throughout Lesotho. Unfortunately some of the attractions and activities promoted on the various routes are not up to standard, in many cases not maintained at all and require renovation and improvement.

FACILITIES AND SERVICES

The Lesotho tourism industry is relatively undeveloped compared to neighbouring countries, with only 143 registered accommodation establishments comprising 2899 rooms and 5757 beds. Accommodation capacity is concentrated in the west of the country and is clustered at key locations such as Maseru.

LTDC has developed a dedicated QUALStar accommodation grading system in 2016 and, to date, 20 of the 143 properties in Lesotho have been graded.

DESTINATION MARKETING

The newly designed tourism brand identity is a big step forward in laying the basis for promoting Lesotho as a modern, upbeat environmental tourism destination rooted in unique and strong cultural traditions. Resources to effectively market the destination, however, are inadequate for the work and output needed and require substantive additional capacity and finances.

INSTITUTIONAL CAPACITY

The core governmental tourism organs are the Ministry of Tourism, Environment and Culture (MTEC) and the Lesotho Tourism Development Corporation (LTDC), a statutory implementing agency. The Department of Tourism of the Ministry and LTDC have tourism promotion and development as their core mandates, while various components of the Ministry have tourism as an important function linked to their core mandates.

Fig. 2 – Thaba-Bosiu cultural village

Map 1
Environmental Features
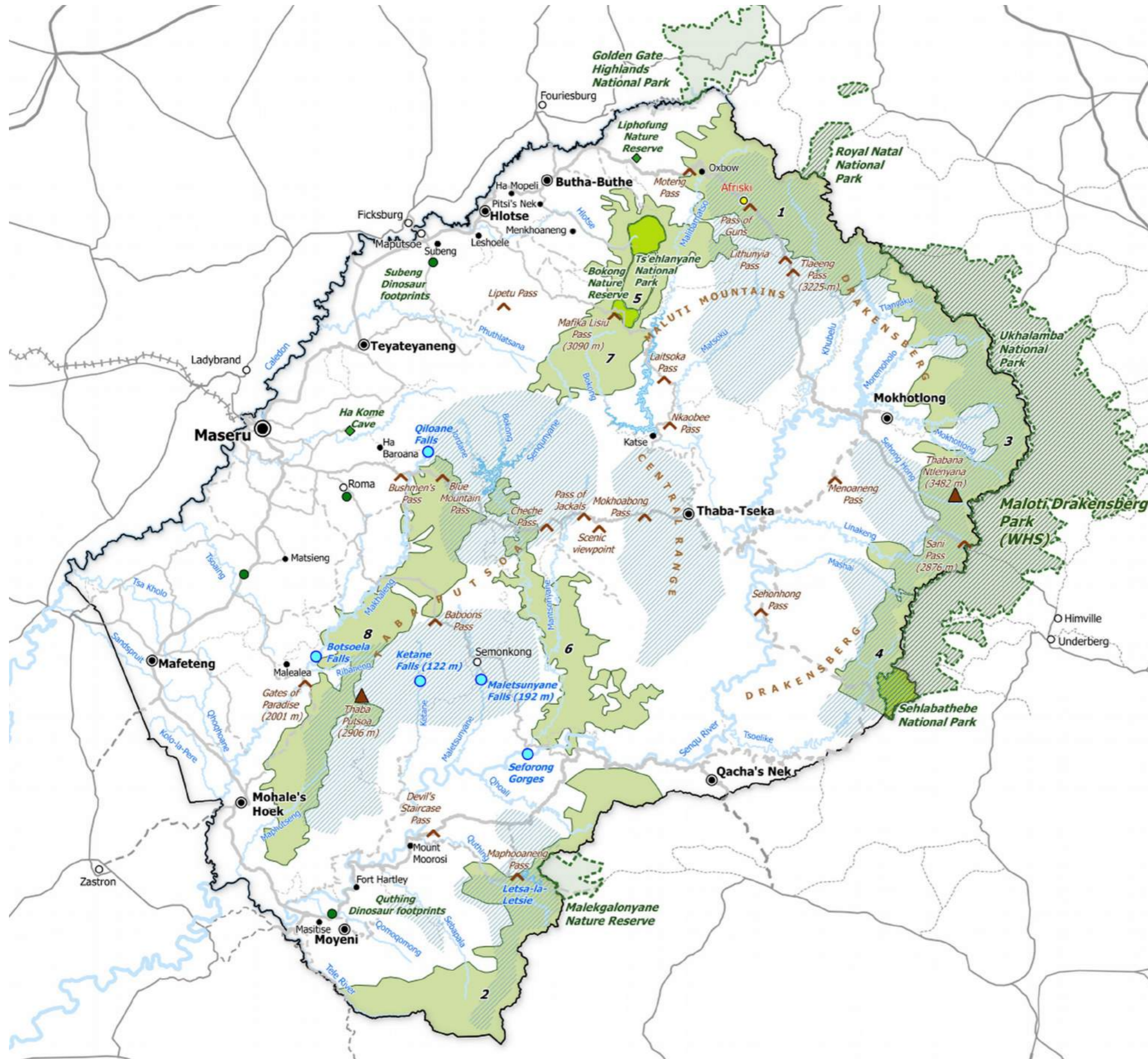
Nature

░	World Heritage Site
⌐	Transfrontier Conservation Area
▢	National Park
▲	Mountain/Peak
⌃	Pass, viewpoint
▣	Botanical Garden
▢	Waterbody
—	Major River
—	Secondary River
◯	Waterfall, gorge
░	Wetlands
▢	Priority cluster areas (MTEC 2014)

1 - Oxbow/Senqu
2 - Quthing-Letseng/la-Letsie
3 - Mokhotlong sources
4 - Shelabathebe
5 - Corridor node
6 - Senquniane/Maletsunyane
7 - Bokong/Tselanyane
8 - Makhaleng/Mokhele range

Natural Heritage

◆	Cave
●	Dinosaur footprints

Source

- MTEC (2014) – Lesotho Environment Outlook Report
- InfoMap (2016) LESOTHO High-Detail GPS Road Map

0   10   20 km

1:1,000,000

Map 2

Natural and cultural heritage

Natural Heritage
- ◆ Cave
- ● Dinosaur footprints

Cultural Heritage
- ● Historic site
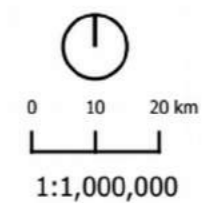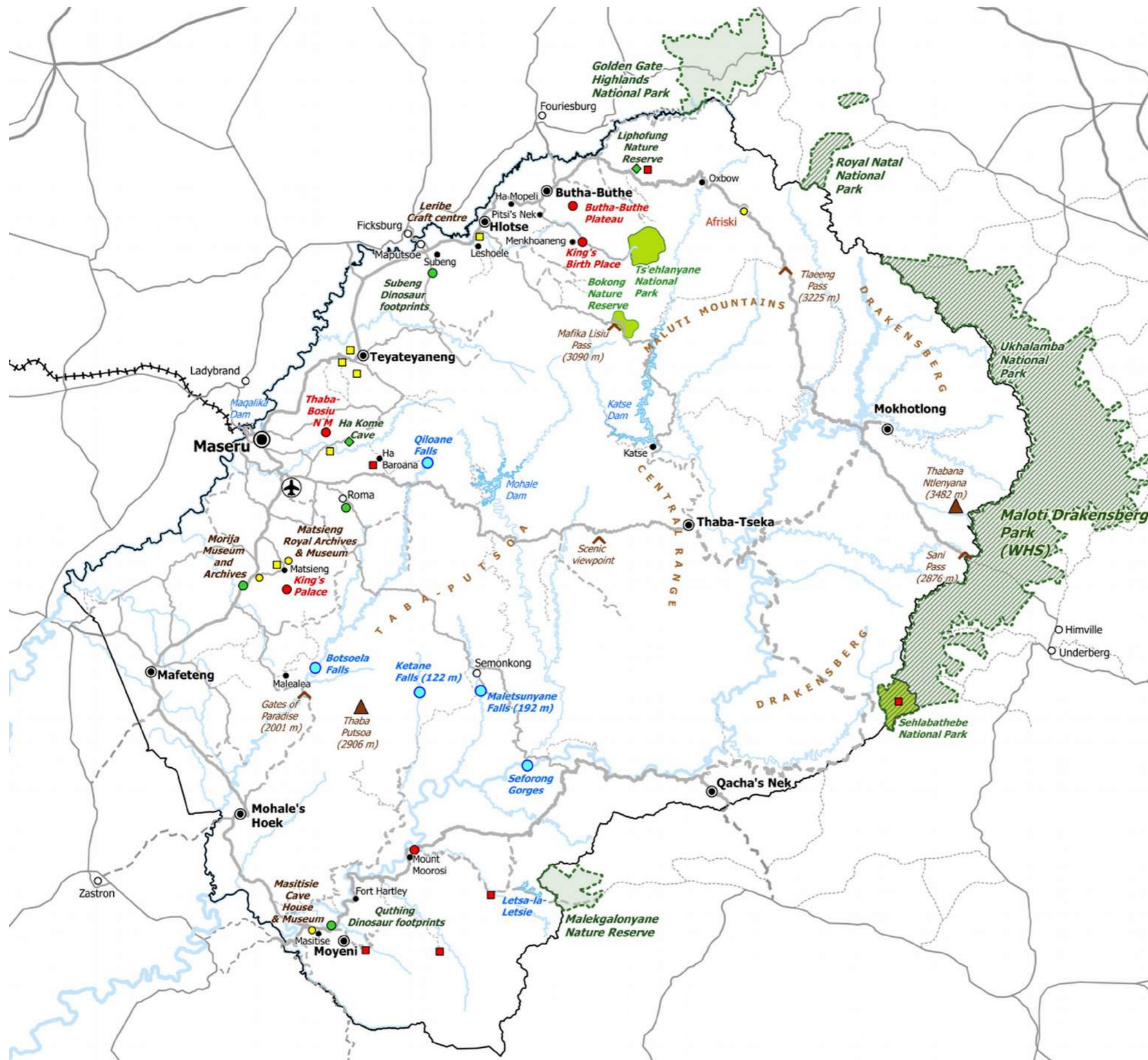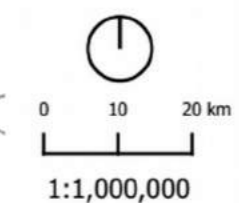- ■ Rock art

Culture
- ■ Art work, craft centre
- ○ Museum

Nature
- ▨ World Heritage Site
- ▦ Transfrontier Conservation Area
- ▮ National Park
- ▲ Mountain/Peak
- ⌃ Pass, viewpoint
- ● Botanical Garden-OFF
- ▮ Waterbody
- — Major River
- — Secondary River
- ● Waterfall, gorge

0 10 20 km

1:1,000,000

The Ministry owns and is responsible for implementing various tourism development projects. Unfortunately several of the Ministry's tourism capital investments (such as visitor centres and accommodation facilities) are currently vacant, have fallen into disrepair, have no management and, sadly, are moribund. This is one of the main reasons why visitors, mainly from South Africa, do not venture deeper into the country; there is, simply, nowhere commensurate with market demand needs to stay!

Fig. 3 – Quthing Dinosaur Footprints

Fig. 4 – Masitisie Cave House Museum & Historic Site

The Lesotho Hotels and Hospitality Association (LHHA), with a membership of 40 accommodation establishments, is currently the most active private tourism association in the country that has plans to include a number of key organisations such as the Tour Operators Association.

There is much to do to clarify and 'normalise' the roles of the MTEC, LTDC and other allied Ministries and Parastatals as well as a National Government commitment to its stated strategic priorities of supporting and resourcing; Technology, Infrastruc-

ture and Tourism, as outlined by the Principal Secretary in the initiation workshop of the masterplanning process.

If the Tourism Economy is to play its part in achieving the strategic goals of Government in poverty reduction, sustainable businesses and job tenure, in particular, then the industry, directly and indirectly in a prioritised structure, must receive commensurate resourcing in terms of capacity and finances, with all related Ministries budgeting for tourism relevant elements of their portfolio.

ENVIRONMENTAL CONTEXT

Lying west of the watershed of the Drakensberg mountains, Lesotho is the only country in the world with all its territory above 1,000 meters. Most of Lesotho's 30,355 square kilometres are mountainous and over 80% of the land is above 1800 metres altitude. Almost the entire Lesotho territory is grassland with patches of indigenous forests, shrublands and thickets extending to only a few hectares. In total, indigenous forests cover less than 1 % of the country and occur mainly along riverine systems and in deep valleys below escarpments.

Lesotho has very little area under protection with only 14,299 hectares (less than 0.5 %) of it being formally protected.

The Country has abundance of water and natural beauty, whose economic potential has not been fully tapped. The main mineral resources are diamonds, dolerite, sandstone and clay.

Lesotho's vulnerability to climate change and climate variability arises from several factors: erratic rainfall, fragile soils, and worsening land degradation in the face of a growing population.

All are exacerbated by poor land-management practices, particularly in the livestock sector. Environmental issues arising from medium to large scale mining projects affect the surface and ground water system, the physical land management, spillage of hazardous chemicals, air and dust. Thus greatly affecting aesthetic values of the area, cultural heritage and communities.

INFRASTRUCTURE

The main ports of entry are Maseru Bridge (43.6 % of arrivals), Ficksburg (30.7 %), Caledoonsport (11.6 %). With 13,652 arrivals, Moeshoeshoe airport accounted for only 1.1%, of visitor arrivals.

The main national trunk routes are the A1 from Maseru to Butha-Buthe and on to Mokhotlong (280 km) and Sani Pass, and

the A2, a good tarred road from Maseru to Moyeni (Quthing), Mount Moorosi and on to Mphaki (248 km).

Lesotho's extremely mountainous terrain poses a particular challenge to the expansion and maintenance of road infrastructure. Although the lowlands are relatively well served with the existing road network, about a quarter of the population live in the remote highlands areas with difficult access.

Fig. 5 – Rock paintings site, Sehlabathebe National Park

Fig. 6 – Rock paintings site, Sehlabathebe National Park

LEGAL CONTEXT

The Tourism Act 2002 reflected the distinctive roles of the NTA (MTEC) and the NTO (LTDC). Subsequently, the Tourism (Amendment) Act 2006 introduced a new provision that the LTDC "…shall be under the general supervision of the Minister", posing an apparent contradiction to the intent of the 2002 Act. In practice, the intended clarity of division of responsibilities between the Ministry and the LTDC has blurred and the role of the LTDC as an executive agency substantially diminished.

The Act (as amended) sets out the functions of the LTDC and this includes "to formulate and implement a National Plan for Tourism". The intention, in the 2002 Act, was that the LTDC be responsible for the National Plan for Tourism that would then be submitted to the MTEC for approval which would then submit to the GoL for adoption. This requires substantive and positive addressing. The clear division of roles of the Ministry as NTA (policy, strategy and regulation) and the LTDC as NTO (executive agency, implementation) are not, in practice, adhered to.

Fig. 7 – Maliba Lodge, Tšehlanyane National Park

The Act provides that the Government shall designate specified areas as tourism development areas, tourist circuits or tourist zones and such areas, circuits or zones shall be subject to the planning restrictions and eligible for financial privileges specified in the Regulations issued by the relevant Ministry or bodies in accordance with the Directive issued by the Government. It also provides that the Minister may, following consultation with the Minister of Local Government, designate specified areas as tourism development areas and the areas are then subject to the

planning restrictions and eligible for financial assistance as the Minister may determine.

It is critical that the GoL, namely the Minister of Local Government, with the Minister responsible for Tourism, should collaboratively agree these critical land use decisions as they affect other ministries, government agencies and districts. And, in line with the Principles and Guidelines of Responsible Tourism, a cross-Ministry agreement should be explored to determine to what extent local communities, as direct beneficiaries and most affected, be consulted – in a fully participatory manner.

Fig. 8 – Letšeng-La-Letsie

POLICY CONTEXT

Tourism is not a discrete sector but an integrated set of intertwined goods and services with most Ministries having, at least, some form of responsibility for some aspects of elements of tourism in various value chains of the wider Tourism Economy.

The development of a set of Tourism Satellite Accounts (TSAs) is the main reason underpinning to what extent 'any' particular Ministry is involved in the value-chains of that Tourism Economy and, thus, to what extent each Ministry should be involved in developing policies specifically and explicitly identifying that Ministry's connection to and responsibility for 'tourism'.

This process is not fully functional, but needs to be, for Sustainable Economic Development to become a hallmark of good practice in Lesotho and for it to be a 'beacon' of progress in the SADC community.

Fig. 9 – Katse Dam

'Policy' per se is the set of guiding principles, underpinned by a legal framework, that not only sets out the organisation and structure under which the sector shall operate but also acts as a guide for all to see and support, inclusive of other, priority, Ministries and Parastatals – as well as being transparent to the industry and public in general.

Evolution of policy for tourism, when the activity touches almost all of the economy, presents challenges. To what extent, for example, should tourism carry policies related to: infrastructure, labour, finance, small business and transport or, should each of these responsible Ministries carry related and linked tourism policies?

2.2 SWOT analysis

The "Tourism Sector Diagnostic" report that preceded and informed the basis for this NTMP gathered and deeply analysed four specific areas of influence in the Lesotho Tourism Economy; the Physical and Environmental Situation context, the Tourism Situation context, the Policy Situation context – and the Legal Situation context.

Each contextualised situation analysis was then subjected to a rigorous SWOT Analysis that can be read in the document "Tourism Sector Diagnostic (May 2018)". These SWOT analyses were then filtered by priority when linked in the National NTMP context and a consolidated National SWOT produced that was included in that Diagnostic. The National SWOT is reproduced following.

Table 1 – Consolidated SWOT analysis

Strengths	Weaknesses
Policy	
– Tourism shall be used as a development tool for the empowerment of rural- communities and women	– Communities have not seen much benefit from tourism and are reluctant to adopt it as a vision
– Effective community involvement shall form the basis of tourism growth	– Communities roles not addressed
– Tourism development shall take place in the context of strong cooperation with RSA and other states in Southern Africa	– Private sector role not addressed
– Sustainable usage of the environment shall be practised	
Legal	
– Lesotho has a bespoke Tourism Law providing the core framework for tourism development	– The Law is often breached in practice
– The Environment Law provides a framework for sustainable development and the protection of natural resources	– There are contradictions in the law itself
– There is a Bill which, when enacted, will protect national heritage	– The 2002 Act (as amended) does not provide a comprehensive framework for tourism development, planning, coordination or private sector regulation[3]
– The law provides the framework for an executive agency (LTDC) and destination marketing to implement tourism development on behalf of the GoL	– The 2006 Amendments to the 2002 Act has led to more direct intervention by the Ministry in the work of the LTDC
Tourism and spatial contexts	
– Unique natural environment and spectacular scenery	– Environmental threats of such as overgrazing, vandalising of heritage, environmental damage of hydro-electric power and dams disturbing river systems
– Spectacular landscapes, geological features and varied topography very suitable for outdoor activities and adventure tourism. Affordable and suitable for more adventurous, younger travellers	– Very little area under protection (less than 0.5%)
– Number of unique ecosystems associated with Maluti highlands/Maloti Drakensberg trans-boundary WHS	– Cultural tourism experiences not easily bookable and reachable
– Protected areas: Sehlabathebe National Park, Bokong Nature Reserve and Tsehlanyane National Park	– Bad planning and design of tourism sites and facilities/ amenities, like signage are lacking in most areas
– Presence of historical sites related to Basotho history, prehistoric sites such as rock art related to San and dinosaur footprints	– Over-dependence on day-trippers from South Africa – limited diversity of demand
– Major hydro-electric engineering feats and some of the largest dams in Southern Africa	– Limited and/or moribund quality accommodation
– One of only 2 ski destinations in Southern Africa	– Expensive and limited air transport, both scheduled and charter
– Surrounded by South Africa, the destination with the largest overseas and domestic market in Southern Africa	– Insufficient road safety
– Easy accessibility by road	– Various areas and sites difficult to reach and a significant number of quite attractive opportunities undeveloped or under-developed / Access roads to sites often in bad condition due to lack of maintenance
– Network of primary roads in good condition or under improvement	– Poor and seasonal road infrastructure in some area – bad for attracting the general scenic traveller but but good for adventure tourism tourists sites and protected areas
– Good main road network, constantly improving	– Quality of tourism facilities and services lack, especially in less developed tourism areas
– Good general infrastructure with excellent water and electricity provision	– Inadequate quality of hospitality and tourism training facilities and teaching staff
	– Limited ground handling, tour operating and tour guiding service
	– Lack of maintenance and management of Government owned and managed properties
	– Role conflict and lack of coordination among key tourism agencies
	– Number of government-owned assets vacant and dysfunctional
	– Poor implementation of plans and no consistent concession systems and policies
	– Nature and heritage conservation services limited and inadequate and poorly resourced integration of northern parks in Ministry
	– Very limited public-private sector trust, partnerships and collaboration
	– Organisational structure of LTDC seems top-heavy
	– Inadequate government tourism funding and Government appears to be not convinced of the revenue potential of tourism
	– Conflicts and lack of trust between government, communities and private sector

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[3] This is amended with the new draft Tourism Act

Opportunities	Threats
Policy	
– Development of key responsible tourism components;	– Policy not fully or adequately adopted at governmental level
– Increased and more accurate information to permit refinement of the policy	– Lack of support from other public bodies
– Clear definition of the roles and responsibilities across Ministries and Parastal entities	– Private sector not convinced of the policy
	– Few stakeholders are acquainted with the policy
Legal	
– Ensuring that the Ministry responsible for Tourism is efficient, dynamic and works within legal norms;	– The current relationship between the MTEC and LTDC does not reflect international best practice in distinguishing between an NTA and an NTO and is confusing to foreign investors and private sector stakeholders in general
– To provide a coherent and effective institutional framework which fosters and underpins the sustainable development of Tourism Economy in Lesotho	– The LTDC is insufficiently resourced both financially and in capacity context to facilitate the tourism development and to engage in PPP as an executive agency
– Creating a supportive structure for the private sector in tourism	– There are potential conflicts between the provisions on tourism development area designation and the environment law and the Heritage Protection Bill that may deter investors in case of conflicting designations
– Providing a framework for cooperation between the public and private sectors	– There is no regulatory framework to support quality assurance or quality control in the tourism sector
– Promoting Sustainable Tourism Development.	
– Consistent with the World Tourism Organization's Global Code of Ethics in Tourism and the implementing Convention	
Tourism and spatial contexts	
– Preparation of the National Transport Master Plan to support tourism development strategies	– Land degradation
– Major cities in South Africa within 1000 km	– Climate change
– Some airstrips could be developed to support tourist circulation	– Heritage assets not adequately protected (risk of loss)
– Capacity to accommodate more bednights given the low occupancy rate	– Low leisure volumes and poor economies of scale
– Possible development of Diamond mines as tourism attractions, interpretative museums	– Very limited destination and digital promotion and international brand awareness, reflecting destination marketing lack of focus and penetration in key priority markets
	– Limited international standard capacity for ground handling, tour operating and tour guiding services
	– Expensive visas for some markets

3. The Tourism Economy

This sections presents four fundamental principles of the approach to planning and policy development that are reflected across this NTMP and also in the accompanying Tourism Policy.

3.1 Tourism as an integrated economic system

For the economic power of tourism to be unleashed in Lesotho and the momentum of growth to gain traction such as to assist the GoL to use tourism as part of it's economic revival plan, a number of well documented recommendations, suggestions and actions must be taken and – acted upon – urgently.

Anything less will risk the realisation of the long-term goal of a vibrant, and profitable, tourism industry diversified across the country and providing meaningful employment – especially to the future population – the youth of today! The high growth scenario, in section 5, is the goal. That requires a sea change, at Government levels, in approach, commitment, resourcing and, overall, taking responsibility for tourism and, critically, clarifying the roles and responsibilities between Ministries, Parastatals and, **vitally**, forming peer-to-peer relationships and bonds with key travel trade organisations.

In the spirit of building a strong nation and a plural society, an apolitical stance is critical as is a collaborative and cooperative approach. Both the, recommendations for, new Tourism Policy and Act stress this approach.

Tourism has, for too long, been seen as an amoebic, indescribable, entity that was, for structural and financing purposes, given 'sector' status that really was not a sector at all but an indefinable, simplistic, collection of holiday and/or business activities. By and large, this is perceived to be true – globally – while, when approached from an economic perspective, is far from practical reality. The actual reality, accepted globally, is that tourism rep-

resents a net export; of goods and services – and, as such, must be treated as any other mainstream sector with all the advantages, incentives and Government support accorded to other, more 'visible' sectors.

"The tourism industry now ranks fourth among worldwide export sectors – behind only fuels, chemicals and food" (ITC/UNWTO, 2015).

There is a vibrant, real and powerful **Tourism Economy** that can play the central role in helping Lesotho to flourish, again, and it is evident, to a greater or lesser proportionate degree – across All Government Ministries and Departments. The value chain graphic following in section 3.3, shows a number of examples across the tourism economy of Lesotho.

Approached correctly, 'Tourism' is – should be – one integrated Economic System, making substantive social, economic and environmental contributions that are very necessary, structurally, to economic success, very responsible to the citizens of the Nation and that can bring wealth creation across many sectors and communities. It can both protect and enhance the country's most valuable resources that provide the most motivation to travel to, in and around, Lesotho; enjoying its people and nature/wildlife, at the same time, generating valuable export earnings and FDI.

'Tourism' touches every sector and segment of commerce, infrastructure, investment, labour training and supply, communications, utilities (power, water, sewage), agriculture, primary industry, health and welfare, education, youth development, small business, women's affairs, mining, customs & immigration – and so on. All Government and private sector stakeholders are 'in' tourism, in some form and to some degree, and, thus, must contribute – play their part – in some form or other, collaboratively. And, in so doing, pay their way, in all forms of taxation, generating major additional income for the Government and, by defini-

tion therefore, earning fiscal subventions for tourism related activities, as developed through the collaborative and prioritised process described.

The Government: working in harmony, cross-sectorally – as described in the Tourism Policy - generating greater economies of scale, by fiscal and other resource allocation and collaboration, to provide the enabling environment, in which tourism activity exists.

The Parastatals: not only being the 'glue' between direct Government entities and the private sector but also the leader of implementing DMO and FDI actions.

The private sector: buying and selling goods and services across the spectrum of the supply chains.

… **all** employing people as well as marketing the Nation for all its attributes. The whole is greater than the sum of its parts!

It is so critical, to assist economic National recovery, that this is not only understood but also acted upon; in planning and resource allocation across all Ministries, Departments and Parastatals. Failure to do this must not be an option. A holistic vision and coordinated, integrated, development is required involving all direct, indirect and induced activities.

This requirement is reflected in intent, in the NTMP, where 9 Tourism Development Routes and 11 Tourism Development Nodes are identified (→ see sections 7.2 and 7.4).

For instance, the Letseng-la-Letsie node has high opportunity for development based on its natural and cultural assets; however, it has no accommodation, no special tourist activities, no high profile attractions developed. And yet, it can be fully 'in' the tourism value chain by integrating and linking downstream SME activities where several Ministries must play a part; Finance, Agriculture,

Roads, Transport, Education, Small Business and Health – to name only seven. Not one of them is 'Tourism' per se! The products could, if planned well, all be on the supply side of tourism; vegetables, meat and fish for example – that can be grown and delivered to hospitality outlets - for example – as well as creating substantive jobs. This is the Tourism Economy in action.

3.2 Responsible Tourism

Responsible Tourism is enshrined in the Strategic Vision of the MTEC. The NTMP is also clear in its approach that embraces the concepts and principles of Responsible Tourism, as its overarching principle. This has been captured in and integrated with Tourism Policy and the new, draft, Tourism Act, along with a series of programmes across Ministries so that the concepts and principles may be actioned, and not become rhetorical nor theoretical.

No form and concept of economic development achieves integrated and holistic development aspirations better, especially for poor and marginalised communities, than one that harmonises and balances the Social, Economic and Environmental aspects, than a Responsible Tourism concept. This form of approach and concept fully underpins sustainability of development and ensures that communities in general, and their economic needs, are at the forefront of the development agenda - while, at the same time, developing and diversifying the product along 'demand' and consumer trend lines.

When systematically planned and implemented, Responsible Tourism enterprise contributes very substantially to GDP; 70%-80% of economic activity is small business and, in Lesotho, may be much higher, considering the rampant informal economy. It also utilises all enabling environment services that Government provides and disburses this across the social spectrum, across the Nation and balances the Social, Economic and Environmental responsibilities of both Government and commerce. It takes responsibil-

RESPONSIBLE TOURISM

Responsible Tourism, as an overarching guide:

– minimises negative economic, environmental, and social impacts;
– generates greater economic benefits for local people and enhances the well-being of host communities, improves working conditions and access to the industry;
– involves local people in decisions that affect their lives and life chances;
– makes positive contributions to the conservation of natural and cultural heritage, to the maintenance of the world's diversity;
– provides more enjoyable experiences for tourists through more meaningful connections with local people, and a greater understanding of local cultural, social and environmental issues;
– provides access for physically challenged people; and
– is culturally sensitive, engenders respect between tourists and hosts, and builds local pride and confidence.

The Cape Town Declaration, 2002.

ity for making better places for people to live and better places for people to visit – whether for business or pleasure or both and delivers independent supply of goods and services.

Developing tourism related enterprises sustainably induces a sense of worth, a sense of recognition and a degree of economic independence – a sense of pride in the knowledge that supply of goods and services is economically viable and, that paying taxes can be a good thing in that it provides for funds to the exchequer to build and maintain vital infrastructure that is critical to market access, for them. This, in turn, contributes substantially to livelihood change and poverty reduction.

By association, Responsible Tourism recognises that, direct, tourism may not always, necessarily, be appropriate for a strategy of livelihood change and rural integration. For example, the CBT model of 'communities' owning, operating, managing and marketing 'destinations', with no 'outside' investor, entrepreneur or mentor who knows the distribution channels of travel, has been superseded and outmoded. However, indirect tourism-related economic activities that are supplementary to day-to-day livelihood activity can achieve substantive and substantial economic empowerment and provide added value by inducing forward linkages to downstream sectors. And, also, by additional income across the country, induced expenditures in the local economy.

Diversifying the product base along with appropriate, essential skills and training, that not only supplies the direct tourism value chain but also creates induced income through wider non-direct tourism market access - and opportunities for value addition generates greater margins on sales, broadens the income streams, reduces risk of market failure and, thus, underpins sustainability of development.

A Government commitment to this concept is very attractive to investors as there is a strong and rising trend in tourist demand for 'product' that has a nature base but also has 'people' and

their livelihoods as integral components of that product. And, so, private entrepreneurs working in harmony with the Government can invest in confidence and be 'proud' to offer such product in the origin markets. Success in this perfectly meets the Government's Policy and distributes tourists and their expenditures more widely around the country, and thus wealth creation in the communities.

The Tourism & Travel industry, led by Government must take responsibility for tourism in making better places for people to live and better places for people to visit.

3.3 The Tourism Value Chain

Understanding and acting upon opportunities identified in the **value chains** of the Tourism Economy is a critical economic development tool that can create substantial competitive advantage in destinations. Cross-sectoral cohesion and development of cross-sectoral harmonising Policies is the 'glue' that bonds the value chain and facilitates an integrated approach to Local Economic Development (LED) – leveraging 'tourism' as the economic powerhouse.

The NTMP development process evolved a unique and specific Lesotho value chain for the tourism economy … that emerged from consultants' analyses and stakeholders input expressed during the Tourism Value Chain Round-table held in Maseru on 26/04/2018.

Fig. 10 – The Tourism Value Chain Round-table held in Maseru on 26/04/2018

The Value Chain defines the essential set of connectors for identifying, isolating, prioritising and acting upon forward and

backwards linkages. The critical understanding is that, for success, product backwards linkages and supply, must be developed in correlation with market demand and be delivered, in the destination, under the most conducive enabling environment with highly focused marketing; forward linkages to the demand side. Both primary functions of the LTDC, under the enabling framework of the MTEC, and their collaboration with other Parastatals and the travel trade; private sector. The value chain assists to 'see' and act upon these essential ingredients.

Tourism value chains, especially, are not well understood and, generally, focus on the most visible sub-sectors of travel & tourism and, then, mostly in the destination itself: air, road and rail transport, accommodation, food and beverage outlets – as examples.

The reality is, however, that the chains are deep and long and present many diverse opportunities for investment, SME development, job creation in the indirect sub-sectors: horticulture, market gardening, api-culture, agro-forestry - for example - as livelihood extension strategies for integrated Local Economic Development and substantial opportunity for value addition, local processing, packaging and distribution thus reducing the need for importing these, vital, commodities.

Value chains involve many value players in many sectors and the widest range of stakeholders at public sector level acting in harmony to design and deliver the 'best' and most sustainable experience possible for visitors to the country - at macro and micro levels - and in direct and indirect sectors.

These extend deep into what we may term 'invisible' sectors as suppliers of tourism products and experiences that are not generally 'seen' as part of tourism: fresh produce suppliers, primary produce producers, processors and distributors - for example - are all 'in' tourism in some way or other to a greater or lesser degree.

The value chain for Lesotho, developed as an integral component of the NTMP shows, clearly, that there are many Government, Civil Society and other Government associated Institutions involved on which the sector depends for smooth running and for sustainable delivery of goods and services.

Additionally, it shows the very substantive depth and range of goods and service providers that reside in the 'invisible' sectors connected to the activity of tourism; banks, petrol stations, supermarkets, architects, solicitors and taxis, as examples.

Figure 13 presents the specific Value Chain, for Lesotho, developed for Lesotho and this NTMP specifically.

3.4 Participatory approach

Participatory Planning, involving all levels and segments of the socio-economic spectrum, is a vital 'tool' in sustainability of development and empowering the Tourism Economy to greatest effect. The principle is that, if local beneficiaries have the opportunity to participate in decisions that affect their lives, the better the chance will be of the National, Provincial and Local Policies gaining traction and being successful. The NTMP does not advocate that all decisions are built entirely on the principles of Participatory Planning and recognises that, to a very substantial degree, that is the role of Civil servants. However, for greatest harmonisation, efficiency and effectiveness of policy implementation, Participatory Planning is a proven strategy for success and impact.

Participatory Planning builds from the bottom up and embraces a phased approach at different levels.

- The **private sector** will be the prime "driver" of economic success and in the position to be the major employer in tourism and related businesses. Local entrepreneurs and tourism support suppliers will benefit most from the economics of tourism and allied industry at the local and regional level. Therefore, a special focus is on identification of development prospects of tourism and tourism-related activities at the micro (local) level as well as the broader private sector in the tourism/travel industry.

- The **local communities**. This includes the local groups in and around existing and potential tourism destinations – Tourism Routes and Tourism Nodes as detailed in Section 7. Special focus is on the creation of employment opportunities for the young and women. Participatory planning enhances sustainability of the 'product' as it generates ownership. This custodianship immeasurably enhances the experiences of visitors especially when the combination of wildlife, nature and cultural 'product' is delivered by local people in special surroundings and marketed and maintained by the private sector and authorities at the National level.

In order to ensure not only industry participation in this development process but also their direct engagement and/or investment of implementation later – beneficiary 'stakeholders' and 'value chain players' are critical to success.
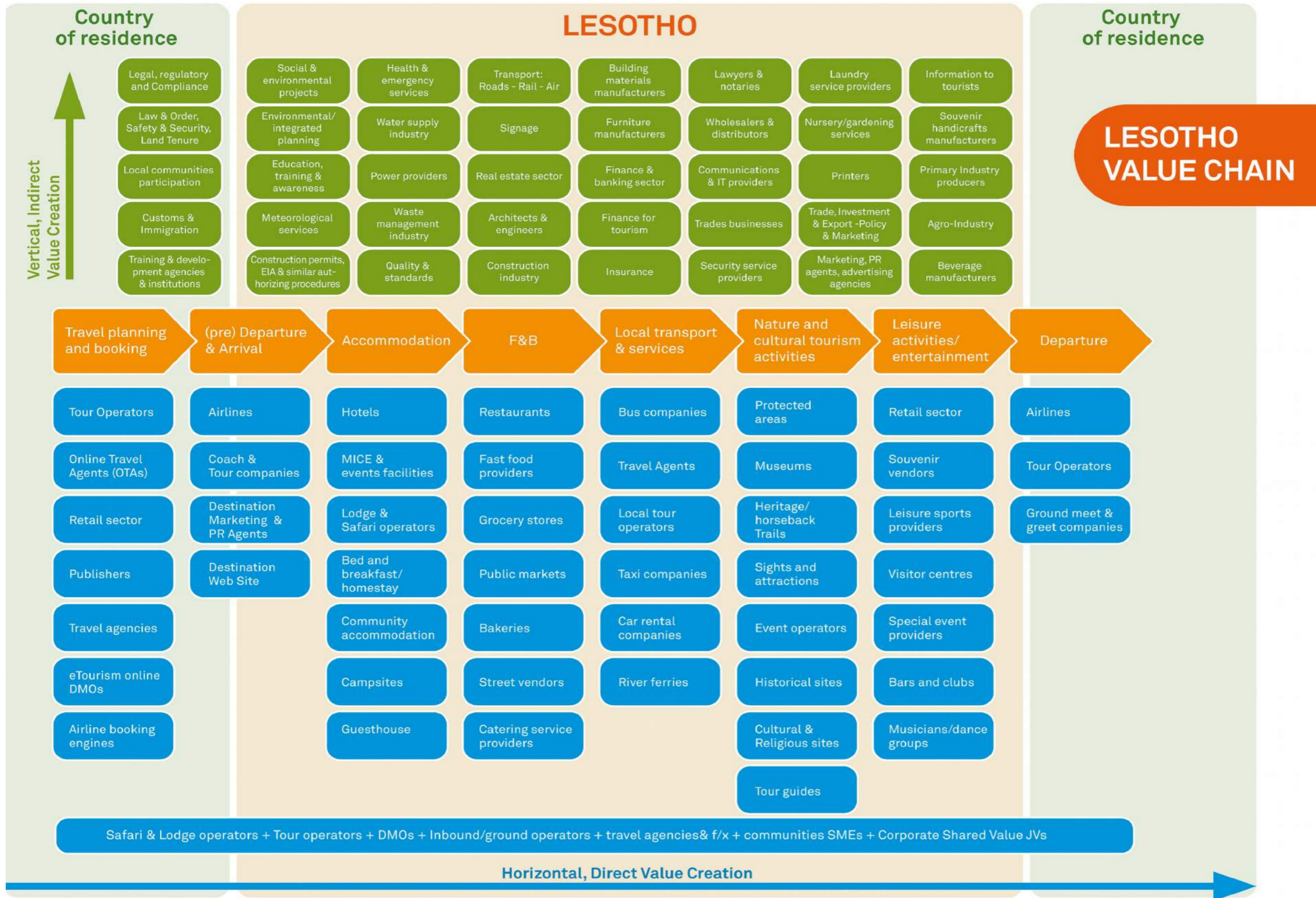
Country of residence

LESOTHO

Country of residence

LESOTHO VALUE CHAIN

Vertical, Indirect Value Creation

Legal, regulatory and Compliance	Social & environmental projects	Health & emergency services	Transport: Roads - Rail - Air	Building materials manufacturers	Lawyers & notaries	Laundry service providers	Information to tourists
Law & Order, Safety & Security, Land Tenure	Environmental/ integrated planning	Water supply industry	Signage	Furniture manufacturers	Wholesalers & distributors	Nursery/gardening services	Souvenir handicrafts manufacturers
Local communities participation	Education, training & awareness	Power providers	Real estate sector	Finance & banking sector	Communications & IT providers	Printers	Primary Industry producers
Customs & Immigration	Meteorological services	Waste management industry	Architects & engineers	Finance for tourism	Trades businesses	Trade, Investment & Export -Policy & Marketing	Agro-Industry
Training & development agencies & institutions	Construction permits, EIA & similar authorizing procedures	Quality & standards	Construction industry	Insurance	Security service providers	Marketing, PR agents, advertising agencies	Beverage manufacturers

| Travel planning and booking | (pre) Departure & Arrival | Accommodation | F&B | Local transport & services | Nature and cultural tourism activities | Leisure activities/ entertainment | Departure |

Tour Operators	Airlines	Hotels	Restaurants	Bus companies	Protected areas	Retail sector	Airlines
Online Travel Agents (OTAs)	Coach & Tour companies	MICE & events facilities	Fast food providers	Travel Agents	Museums	Souvenir vendors	Tour Operators
Retail sector	Destination Marketing & PR Agents	Lodge & Safari operators	Grocery stores	Local tour operators	Heritage/ horseback Trails	Leisure sports providers	Ground meet & greet companies
Publishers	Destination Web Site	Bed and breakfast/ homestay	Public markets	Taxi companies	Sights and attractions	Visitor centres	
Travel agencies		Community accommodation	Bakeries	Car rental companies	Event operators	Special event providers	
eTourism online DMOs		Campsites	Street vendors	River ferries	Historical sites	Bars and clubs	
Airline booking engines		Guesthouse	Catering service providers		Cultural & Religious sites	Musicians/dance groups	
					Tour guides		

Safari & Lodge operators + Tour operators + DMOs + Inbound/ground operators + travel agencies& f/x + communities SMEs + Corporate Shared Value JVs

Horizontal, Direct Value Creation

Fig. 11 – The Lesotho Tourism Value Chain

4. Strategic positioning

4.1 Background

4.1.1 National context

Lesotho is a land-locked country, completely surrounded by its neighbour South Africa. It has a population of about two million and a gross domestic product (GDP) per capita of $1,020. Lesotho is classified by the World Bank (WB) as a low-income country.

According to the WB, growth is estimated to have registered 2.5% in 2016/17, due to drought and weak regional and global growth prospects.

Unemployment remains high at estimated levels between 24% and 28%. Although the headcount poverty rate (1.9 $/day PPP) fell from 61.3% in 2002 to 59.7%, estimates by different sources suggest that 56.2% of the population in 2016 still lived in extreme poverty. The slowness of poverty reduction goes hand-in-hand with high inequality, measured at 0.54 by the Gini coefficient[4].

Considered by the Government of Lesotho (GoL) as one of the key pillars to accelerate inclusive economic growth, the private sector development is hindered by several factors affecting both Foreign Direct Investment (FDI) and the growth of local businesses. All quantitative measures suggest that business regulations seriously constrain growth. Despite making progress in streamlining business and property registration and in establishing and operating a credit bureau, Lesotho ranks low on key Doing Business Indicators, such as dealing with construction permits, accessing finance and the cost of capital. These are constraints on domestic entrepreneurship, suggesting that the domestic private sector remains dependent on the state and non-tradable sectors (WB, 2017).

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[4] The Gini coefficient represents the income or wealth distribution of a nation's residents, and is the most commonly used measurement of inequality.

4.1.2 Institutional framework

The **Ministry of Tourism, Environment and Culture** (MTEC) is the branch of the Government who carries the responsibility for tourism. It is particularly meaningful that tourism is placed under the same "umbrella" with culture and environment. The mission of the ministry is to promote environmentally and culturally sustainable development, making Lesotho an attractive tourism destination through provision of high quality service and creation of enabling environment for the private sector driven and community based tourism development. The **Lesotho Tourism Development Corporation** (LTDC) is the industry organization that replaced the Tourist Board, aiming at supporting the development of a sustainable tourism industry through effective partnership with the private sector and the community in strategic marketing, research, product development, quality service delivery and human resource development as well marketing inward investment for tourism projects.

The establishment of the **Lesotho Council for Tourism** (LCT) as the apex private sector organization representing the tourism industry was attempted in 2009 but did not succeed. This is an ongoing consideration for the GoL.

4.1.3 National Vision 2020

The national vision was drafted in 2000 to provide a long-term perspective within which national short to medium-term plans could be formulated. The specific objectives of the Lesotho Vision 2020 are to: establish a long-term vision for Lesotho by looking beyond the short-term plans and adjustments; explore the options for economic, political and human development to the year 2020; identify alternative development strategies suitable for the Lesotho situation; promote a process of open dialogue and consultation with socio-economic groups countrywide; create an environment whereby Basotho will actively participate in achieving the Vision 2020; and develop a focus along the horizon in the direction of which development plans could be rolled out.

The Lesotho Vision 2020 reads as follows:

> **By the year 2020 Lesotho shall be a stable democracy, a united and prosperous nation at peace with itself and its neighbours. It shall have a healthy and well-developed human resource base. Its economy will be strong; its environment well managed and its technology well established.**

Tourism plays a role in the Lesotho Vision 2020: the spectacular scenery of the Lesotho highlands, the country's unique ecosystem, biodiversity and heritage offer a great potential for the country's tourism opportunities. The MTEC, with the LTDC, is identified as having a critical and central role in the Social, Environmental and Economic aspects of achieving Vision 2020 through three specific framework matrices 5.5, 5.8 and 5.9 of Vision 2020. This accords completely with the Responsible Tourism overarching concept and framework on which the NTMP is based.

4.1.4 The United Nations Sustainable Development Goals

The Government of Lesotho, as a member of the UNWTO, subscribes to the UN-SDGs and, specifically, those that are identified for tourism.

"Harnessing tourism's benefits will be critical to achieving the sustainable development goals and implementing the post-2015 development agenda" UN Secretary-General, Ban Ki-moon on World Tourism Day 2014.

Three SDGs have been identified, by the UN-WTO, as being directly inclusive of the tourism sector.

Goal 8: promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all

Tourism is one of the driving forces of global economic growth, and currently accounts for 1 in 11 jobs worldwide. By giving access to decent work opportunities in the tourism sector, society- particularly youth and women- can benefit from enhanced skills and professional development.

The sector's contribution to job creation is recognized in target 8.9 *"By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products"*. This TMP and overarching Policy addresses this SDG in some substance.

Goal 12: ensure sustainable consumption and production patterns

A tourism sector that adopts sustainable consumption and production (SCP) practices can play a significant role in accelerating the global shift towards sustainability. To do so, as set in target 12.b of Goal 12, it is imperative to *"Develop and implement tools to monitor sustainable development impacts for sustainable tourism which creates jobs, promotes local culture and products"*. The Sustainable Tourism Programme of the 10-Year Framework of Programmes on Sustainable Consumption and Production Patterns aims at developing such SCP practices, including resource efficient initiatives that result in enhanced economic, social and environmental outcomes.

Goal 14: conserve and sustainably use the oceans, seas and marine resources for sustainable development

Coastal and maritime tourism, tourism's biggest segments, particularly for Small Island Developing States (SIDS), rely on healthy marine ecosystems. Tourism development must be a part of integrated Coastal Zone Management in order to help conserve and preserve fragile ecosystems and serve as a vehicle to promote the blue economy, in line with target 14.7: *"by 2030 increase the economic benefits of SIDS and LDCs from the sustainable use of marine resources, including through sustainable management of fisheries, aquaculture and tourism"*.

At first glance this SDG may, appear to, not be applicable to Lesotho. However, in the context of conservation there is a major consideration related to an endemic fish addressed by the LHDC where conservations measures are in place and the story could be part of a walking tour of the dams. In the context of tourism product, the integrity and cleanliness of the waters containing trout would need to be a special focus.

4.1.5 The Poverty Reduction Strategy

The PRSP 2005-2008 was established as the result of an extensive participatory process. It builds on a number of government documents and initiatives, including the I-PRSP, National Vision 2020, National Goals, and the Millennium Development Goals (MDGs). While Vision 2020 articulates the level of development that Basotho aspire to attain by 2020, and the MDGs reflect longterm goals and targets to be achieved by 2015, the PRSP provides a framework for making progress toward the attainment of those goals and targets within three years.

The PRSP has three interconnected goals: (i) create jobs through the establishment of an environment that facilitates private sector-led economic growth; (ii) empower the poor and the vulnerable and improve their access to health care and education; and (iii) deepen democracy and improve public sector performance, to ensure that policies and legal frameworks facilitate the full implementation of priorities. These goals are consistent with the multi-dimensional nature of poverty in Lesotho and reflect an appropriate response to the national priorities (IMF).

The PRSP has a specific focus on tourism. It recognizes that to make better use of its natural beauty and existing infrastructure, Lesotho needs to attract more tourists. The focus will be to:

– develop tourism products and some circuits to their full potential;

– increase the visibility and marketability of Lesotho as a destination of choice;

– improve quality and standard of services in the sector;

– protect, conserve and promote viable use of tourism and cultural heritage resources; and

– improve the institutional support services.

The five focus points above are the pillars of a new tourism development strategy of which this NTMP and accompanying Tourism Development Area Plans and Tourism Action Plan are the operational transcription.

4.1.6 The National Strategic Development Plan

The Lesotho's NSDP 2012/13-2016/17 (NSDP) aims to facilitate tourism product development, increasing community participation as well as cooperative marketing in the region and linkages with the rest of the world through ICT solutions and improvements in customer service and hospitality standards.

The NSDP set a bold target of **increasing demand by 50 percent**, bringing the number of tourists to approximately 500,000 by 2016/17, with an estimated impact on employment in the sector of 25%, with many of these jobs created in rural areas, where the highest levels of under-employment occur.

The NDSP and NTMP should reflect each others National objectives in this regard.

4.1.7 The economic diversification project

The African Development Bank (AfDB), through the Economic Diversification Support Project supports the GoL's diversification agenda and efforts to create jobs and promote inclusive growth through enhanced economic diversification and strengthened enterprise development.

The EDSP has a specific focus on private sector development through improved partnership, entrepreneurship and skills development, and investment promotion in the selected sectors critical for economic diversification. Sub-component 1.1. of the EDSP is designed to, *inter alia*, facilitate strengthening of policy environment and capacity for economic diversification within the Ministries of Trade and Industry (MTI) and Tourism, Environment and Culture. Support to tourism sector is seen as particularly crucial given the potential contribution of tourism to the Lesotho economy.

This NTMP is a key output of this framework, as a tool to strengthen the national tourism policy and legal framework and to enhance destination planning and management.

4.2 Vision

To develop an inclusive, robust and vibrant Tourism Economy delivering a unified approach to economic growth through responsible tourism development, conservation and promotion of Lesotho's environmental and cultural assets.

4.3 Mission

To proactively facilitate the growth of an inclusive, competitive and sustainable tourism economy through ensuring:

- Delivery of high quality market oriented tourism products and services;
- Strategic partnerships and collaboration across the tourism economy value chain;
- Stimulation of private sector direct and indirect investment in product diversification; and
- Integrated, cross sectoral, responsible tourism development.

4.4 Objectives

General objective

The tourism objective, as recorded in the 2018 Tourism Policy, is to improve the quality of life of the Lesotho population with tourism identified as a key instrument in achieving this end.

Accordingly, the general objective of the NTMP is to establish the overarching guide to the development of Tourism in Lesotho to 2038 and beyond by providing direction to product development and diversification, preservation of nature, culture and heritage, community participation, involvement of the private sector, human resources' development, infrastructure development, and marketing and promotion strategies; it has the following specific objectives.

Economic objectives

- To diversify the product base more widely around the country and facilitate development of small and medium enterprises that meet both market needs and local employment needs.
- To develop product and aligned, collaborative, marketing efforts such that both trade and consumer see opportunities to extend the length of stay beyond 5 nights average.

Social objectives

- To enhance opportunities for youth and women to join the Tourism Economy and foster a culture of community collaboration.
- To nurture and develop the natural welcoming nature of the Basotho people and market this as a key asset.

Environmental objectives

- To enable priority resources and institutional structure to expand protected areas to a ratio of '5%', so to better protect and conserve Lesotho's outstanding biodiversity.
- To prioritise sustainability of development imperatives that ensure 'clean and green' principles in all new construction as well as refurbishment of infrastructure and superstructure.

4.5 Strategic framework

The Tourism Sector Diagnostic for this NTMP investigated and tested Strengths, Weaknesses, Threats and Opportunities facing Lesotho in the immediate and long term. The result has revealed a number of strategic priorities that were captured in the prioritised and consolidated National SWOT presented in that key informative analysis. The process led to a series of strategic recommendations across seven mutually exclusive components.

These are priority recommendations of major significance and importance to both immediate and future development and operational aspects and, as such, have emerged as the core strategic pillars of all planning and captured across the Policy and the NTMP. Other areas to be addressed are contained in the body of the Diagnostic report, in substantial detail, such as, but not confined to, clarity and agreement required on the interrelated and synergistic roles, responsibilities and functions of the NTA and NTO.

The pillars are organized in seven destination development imperatives for the Strategic Development Framework of this NTMP. These are:

1. Ensure an appropriate institutional and legal framework
2. Improve visitors' experience
3. Improve and expand the product base
4. Provide the necessary infrastructure
5. Marketing and Branding of the Destination
6. Create a favourable business and investment climate
7. Ensure environmental and social sustainability

Section 6 is structured accordingly and aligns with the related Tourism Policy.

Fig. 12 – The seven pillars of the NTMP strategic framework

4.6 Timeframe for implementation

It is expected that this NTMP, together with the accompanying Actions Plans, will form the basis for an implementation programme to be developed by the MTEC in collaboration with the LTDC and private sector as it has benefited from deep, intensive and extensive stakeholder participatory inputs. Also, it benefits of LTDC survey based information from the primary markets of South Africa, UK, USA, and Germany that constitute more than 90% of total inbound tourism to Lesotho, that will help the decision making process.

In that respect therefore, together with considerations for the fast paced exponential changes in technology and political contexts, internationally and regionally, social changes and competition marketing that are rapidly exposing stakeholders and travellers to deeper knowledge and related actions, and economic circumstance, it is envisaged that the NTMP action plans will have firstly a detailed time horizon 2018-2028 in two 5 year periods and an extended and less detailed period extending to 2038.

Under the pressing economic development circumstances of goals in the National Development Strategic Plan, the GoL is committed to rapid action in the coming five years, to 2023. As such, the NTMP is designed to be a good roadmap for that process and still be 'in force' and relevant by the end of that time period with the first of the Action Plans having been implemented.

However, to accommodate 'change', as described above, and for the plans from 2024 onwards, while still have the NTMP as its overarching guide, each of the Action plans is intended to be updated at the end of each active year. This means that none of the plans, NTMP included, will need to be static. The pace of change will mean that any document not updated will be out of date and risk being impotent very quickly.

Fig. 13 – Sehlabathebe National Park

5. Growth Scenarios

5.1 Situation Overview

5.1.1 Visitor Arrivals

The official record of visitor arrivals shows a relatively stable situation 2014-2017 and particularly so from source markets other than South Africa. Due to the method of collecting data; depending on border crossing data from South Africa, purpose of travel and length of stay is not clear nor if they include same day visitors i.e. excursionists.

While it is reasonable to treat most coming from international markets to be classified as tourists and visiting for either leisure or business purposes, the same is not clear with respect to visitors from South Africa where large numbers must be assumed to be same-day visitors or those visiting friends or relatives.

Table 2 – Leading source market for visitors to Lesotho

Source	2014 (,000)	2015 (,000)	2016 (,000)	2017 (,000)
South Africa	969	970	1,081	1,010
Zimbabwe	21	21	21	21
Botswana	7	7	9	8
Swaziland	4	5	5	4
China	10	8	7	8
India	5	4	4	5
USA	9	10	10	9
UK	6	6	5	6
Germany	4	6	8	9
Netherlands	4	6	8	9
Other	41	40	38	50
Total	**1,079**	**1,082**	**1,196**	**1,137**

Source: LTCD Annual Reports on Tourism (2017)

Visitor numbers have increased on average by 1.8% per annum over the four year period. Lesotho is very much dependent on the South African market accounting as it does for ±90% of the total visitor numbers over the four years to 2017. Approximately 6% of visitors came from overseas' markets and a further 4% from other African countries. While Lesotho can promote itself directly to the world at large, in practice, South Africa is the logical pool from which it draws visitors, they being either South African residents or visitors to South Africa.

Table 3 – Source visitors by continent

Source	2014 (,000)	2015 (,000)	2016 (,000)	2017 (,000)	2014 %	2015 %	2016 %	2017 %
Africa	1,018	1,019	1,132	1,061	94.3	94.1	94.6	93.3
America	11	12	12	10	1.0	1.1	1.0	0.9
Asia	26	23	22	30	2.4	2.2	1.8	2.6
Europe	24	28	31	35	2.2	2.6	2.6	3.1
Total	**1,079**	**1,083**	**1,196**	**1,137**	**100.0**	**100.0**	**100.0**	**100.0**

Source: LTCD Annual Reports on Tourism (2014-2017)

Leading source market areas performance was patchy with annual growth from Africa being 1.4% in the three years, better in Asia with average increases of 5% and best from Europe with a, close to, 15% per annum recorded. North American visitor numbers contracted by an average 2.5% .

The importance of South Africa as a source and conduit for visitor numbers, the degree to which Lesotho is achieving market share and the potential for further market penetration is shown in Table 4. Of the three main overseas geographic source markets, it has more or less maintained its relative position accounting for approximately 2.7% to 2.8% of direct arrivals to South Africa. It offers the possibility for major expansion.

Table 4 also shows the degree to which Lesotho has performed in attracting South African residents compared with South African domestic tourism numbers. Its market share on this comparison is tiny but at a time when South African visitor numbers to Lesotho increased, domestic tourism numbers in South Africa fell by about 40% probably arising from the worsened South African economic situation.

Table 4 – Lesotho's shares of overseas visitors to RSA and of RSA domestic tourism

	Visitors to Lesotho				Tourists to South Africa				Lesotho compared with South Africa			
Source	2014 (,000)	2015 (,000)	2016 (,000)	2017 (,000)	2014 (,000)	2015 (,000)	2016 (,000)	2017 (,000)	2014 %	2015 %	2016 %	2017 %
Asia/Pacific	26	23	22	30	427	397	497	496	6.1	5.9	4.4	6.0
Europe	24	28	31	35	1,400	1,351	1,570	1,688	1.7	2.1	2.0	2.1
America	11	12	12	10	435	404	474	546	2.5	2.9	2.5	1.9
Other	1	1	1	1	15	14	12	13	3.3	4.3	4.2	7.7
Total	**61**	**63**	**65**	**76**	**2,277**	**2,166**	**2,553**	**2,743**	**2.7**	**2.9**	**2.5**	**2.8**
South Africa	969	970	1,081	1,010	273,900	249,000	149,500	152,000	0.4	0.4	0.7	0.7
Other Africa	49	49	51	51								
Total Africa	1,018	1,019	1,132	1,061								
Total	**1,079**	**1,083**	**1,196**	**1,137**								

Source: Lesotho and South African Official statistics (2014-2017)

5.1.2 Extent of tourism using accommodation statistics

Tables 5 covering 2016 and 6 covering 2017 are compiled from the returns which all accommodation providers are obliged to make to the LTDC. Significant features are the low occupancy figures for all categories of accommodation and the low usage of paid accommodation among visitors. This obviates the, very large, excess capacity in the room stock.

ESTIMATING THE COMPOSITION OF VISITOR NUMBERS

LTDC records indicate that more than a million foreign residents visited Lesotho in each of the four years 2014 – 2017. Included in the figures are same day visitors who do not overnight and called 'excursionists'; those who stay are classed as 'tourists'. The numbers in each category are not recorded and can only be estimated. It is of major importance to lay down markers to establish baseline figures against which targets can be established and form the basis for marketing and investing decisions.

Analyses of accommodation usage by domestic and international residents, indicate the size of the Leisure and Business tourism segments. In relation to the headline figures, Table 7 shows that the numbers of 'Business' and 'Leisure' cannot be estimated much above 4.5% for the past four years. The estimate is based on the assumption that most business and leisure tourists will stay in registered accommodation. (Few may using camping facilities or have access to private unregistered accommodation.)

Comparing the available accommodation data in the three years 2014, 2016 and 2017 and assuming average stays of four nights (according to the 2016 EXIT survey, for an average of 3 and 7 nights three for leisure and seven for business), with total arrivals suggest that approximately 4% of arrivals come for leisure or business purposes.

Table 5 – Accommodation capacities and bed occupancy levels 2016

Category	Capacity			Guest nights			Rev Accommodation (M)		
	Rooms	Beds	Bed Occ %	Local	Non- local	Total	Local (,000)	Non- local (,000)	Total (,000)
Hotel	937	1,645	26	97,137	43,429	140,566	59,191	308,752	367,943
Lodge	579	1,238	22	40,218	42,362	82,580	16,905	14,160	31,065
B+B	288	471	28	13,753	7,991	21,744	4,023	2,304	6,327
GH	818	1,566	24	71,597	38,503	110,100	27,933	15,741	43,674
Other	277	837	13	13,879	3,477	17,356	2,017	1,712	3,729
Total	**2,899**	**5,757**	**23**	**236,584**	**135,762**	**372,346**	**110,069**	**342,669**	**452,738**

Source: Lesotho and South African Official statistics (2016)

Table 6 – Accommodation capacities and bed occupancy levels 2017

Category	Capacity			Guest nights			Rev Accommodation (M)		
	Rooms	Beds	Bed Occ %	Local	Non- local	Total	Local (,000)	Non- local (,000)	Total (,000)
Hotel	1,219	1,770	35	139,494	100,286	239,780	402,115	46,496	448,611
Lodge	685	1,365	14	40,771	43,825	84,596	15,600	18,196	33,796
B+B	239	401	15	15,124	10,169	25,293	4,657	2,503	7,160
GH	945	1,625	23	108,121	42,221	150,342	85,073	16,791	101,864
Other	412	1,720	8	42,344	737	43,081	25,505	5,297	30,802
Total	**3,501**	**6,881**	**20**	**345,854**	**203,874**	**549,728**	**532,950**	**89,283**	**622,233**

Source: Lesotho and South African Official statistics (2017)

Table 7 – Estimating international tourism numbers from bed-night numbers

	Staying in paid accommodation			
	Visitors arrivals (,000)	Bed-nights (,000)	Equating to tourist numbers (,000)	Tourists as a % of visitors numbers (,000)
2017	1,137.1	203,8	51,0	4,5%
2016	1,196,2	135,6	33,9	2,8%
2015	1,082,4	n.a.	--	--
2014	1,078,5	195,4	48,9	4,5%

Source: Visitor arrivals and Bed Nights from LTDC annual reports

5.1.3 The value of tourism

The main objective of state's involvement in tourism is to increase national income – directly and from increased induced local expenditures. For effective planning there must be a perception of the amount being spent by visitors and the impact this is having on the national economy.

A measure of its importance including estimates of earnings from tourism is shown on Table 8 below which is drawn from the World Travel and Tourism Council's analysis of Lesotho for 2017.

Table 8 – Estimating the value of tourism

	2017 LSL (mn)	2017 US$ (mn)	% of GDP	Jobs (,000)	Share of total jobs	Share of exports	Share of all Invest ments	Pro jected 10 yr growth
GDP				2017				
Direct contribution	1,916	143	6.3%					3.4%
Total Contribution	4,190	313	13.8%					3.6%
Employment								
Direct contribution				43	6.2%			2.7%
Total Contribution				95	13.5%			1.9%
Tourism Exports	793	59	5.5%			5.5%		3.9%
Tourism Investment	639	48	7.3%				7.3%	4.7%

Source: - WTTC¬ Travel and Tourism Impact Lesotho 2018

GDP: DIRECT CONTRIBUTION

The direct contribution of Travel & Tourism to GDP was LSL1,915.5mn (USD143.2mn), 6.3% of total GDP in 2017 and is forecast to rise by 1.7% in 2018. It is estimated to rise by 3.4% pa, from 2018-2028, to LSL2,717.5mn (USD203.2mn), 5.8% of total GDP in 2028.

GDP: TOTAL CONTRIBUTION

The total contribution of Travel & Tourism to GDP was LSL4,190.3mn (USD313.3mn), 13.8% of GDP in 2017, and is forecast to rise by 2.3% in 2018, and to rise by 3.6% pa to LSL6,084.3mn (USD455.0mn), 12.9% of GDP in 2028.

EMPLOYMENT DIRECT CONTRIBUTION

In 2017 Travel & Tourism directly supported 43,000 jobs (6.2% of total employment). This is expected to fall by 2.0% in 2018 and rise by 2.7% pa to 55,000 jobs (6.4% of total employment) in 2028.

EMPLOYMENT TOTAL CONTRIBUTION

In 2017, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry was 13.5% of total employment (94,500 jobs). This is expected to fall by 2.2% in 2018 to 92,500 jobs and rise by 1.9% pa to 112,000 jobs in 2028 (13.1% of total).

VISITOR EXPORTS

Visitor exports generated LSL792.6mn (USD59.3mn), 5.5% of total exports in 2017. This is forecast to grow by 6.3% in 2018, and grow by 3.9% pa, from 2018-2028, to LSL1,240.5mn (USD92.8mn) in 2028, 3.7% of total

5.1.4 Comparisons: Lesotho, Sub-Sahara and World

Tourism is an important component in the global economy accounting for 10% of GDP and 0.3 billion jobs in 2017. Although small in absolute size (room capacity in Lesotho is less than 2% that of South Africa), the economic importance of the tourism sector in Lesotho is, relatively, higher than that for the World at large. However this is being achieved outside of the leisure sector as direct spending on leisure activities accounted for only 0.5% of total national spending in 2017 as is shown in Table 9.

Table 9 – Importance of tourism to Lesotho vs sub-saharan countries and world

	Lesotho US$(m)	Sub Sahara Africa US$ (bn)	World US$ (bn)	Lesotho % of total	Sub Sahara Africa % of total	World % of total
GDP						
Direct contribution	143	44	2,570	6.3	2.7	3.2
Total Contribution	313	117	8,272	13.8	7.1	10.4
Tourism Exports	59	30	1,494	5.5	8.5	6.5
Domestic spending	215	50	3,971	9.4	3.1	5.0
Leisure Spending	25	51	4,233	0.5	1.7	2.5
Business Spending	249	30	1,231	5.7	1.0	0.7
Capital Investment	48	18	882	7.3	5.2	4.5
	(,000)	(,000)	(,000)	% of total	% of total	% of total
Employment						
Direct contribution	43	6,789	118,454	6.2	2.3	3.8
Total Contribution	94	17,204	313,221	13.5	5.8	9.9

Source: - WTTC¬ Travel and Tourism Impact Lesotho 2018

There are no official record of total direct foreign earnings from tourism in Lesotho. In its absence the World Travel and Tourism Council produces annual estimates of international and domestic spending on travel and tourism; those for 2017 being LSL 438 million for spending by international tourists and LSL 2,661 for domestic.

5.1.5 Estimates and targets

Essentially estimates are made on the basis of past trends projected into the future adjusted to take account of the impacts of expected changes in capacity, quality, access, security, general economic situation in Lesotho and in source markets. The close ties with and dependence on the prosperity of the RSA must also be taken into account.

Setting targets for tourism growth is popular in many countries and regions but these in most instances are purely cosmetic. There are niether prizes for achieving targets nor consequences for failure. The problem is that it is difficult to establish a link between changes in tourism spending and growth.

5.1.6 Forecasts: Lesotho compared to South Africa

The World Travel and Tourism Council (WTTC) prepares ten year tourism forecast for most countries including Lesotho and South Africa. Its ten year annual estimates for both countries up to 2028 are:

Table 10 – Ten year annual growth rates 2028 on 2018

	Lesotho	Sotuh Africa
Visitor exports	3.9%	4.5%
Domestic Expenditure	3.0%	3.9%

Source: - WTTC¬ Travel and tourism impact surveys for Lesotho 2018 and South Africa 2018

The International Civil Aviation Organisation (ICAO) in 2016 forecast for air traffic passenger-kilometres 2012 – 2032 (Compound Annual growth rates) to and from Africa were:

- Europe -Sub Saharan Africa   2.1%
- North America -Africa   3.1%
- Middle East – Africa   4.9%
- Asia/Pacific – Africa   6.1%

5.2 Growth scenarios and Projections

Making ten year forecasts for any sector is not an exact science. It is even less so for forecasting international tourism given its vulnerability to a host of extraneous (and internal) events with the potential to be catastrophic when impacted as it can be by such factors as civil disorder and wars, health epidemics, terrorists actions, economic recessions and 'ordinary' events, changes in 'fashion' and the unintended results of Government actions. Some of these events have impacted adversely on tourism in Southern Africa in the past decade and, if the past is any indicator, the Region is likely to be faced with similar events in the coming two decades.

'People' are notoriously risk averse and will seek perceived 'safe' destinations even if logic and evidence suggest otherwise. Zimbabwe is a perfect example of this, where, despite the country being extremely safe, its people friendly and accommodating and the product excellent – severe downturns in visitor numbers were recorded for many years – simply, in the main, because the country was getting bad press abroad.

Forecasts are necessary for planning and investment purposes. It is better to have informed forecasts from estimated data that none at all. They are needed to encourage strategic thinking and planning from the public and private sectors of the industry. It is intended that the MTEC will use these Scenarios to assist its work in supporting the industry.

The projections are and can only be estimates not predictions. They are based on technical analysis of current trends and short to medium term forecasts of international agencies, using econometric formulae and science, balanced by the recorded impact of past influences. They are produced with the caveat covering all forecasts, that there is considerable uncertainty attached to the future; Political, Economic, Social, Environmental, Legal and Technological influences, and thereby their accuracy. The forecasts are hostages to global change, in the political, economic and environment situations in source countries and particularly as regards to Lesotho, changes in RSA itself.

Of the myriad possibilities for the outcome of tourism in Lesotho, three models have been created to guide and assist decision making of – as part of other decision-making criteria used by the planners.

The first is for a low growth scenario that indicates what may happen if things keep going on as in recent years. The second is for a medium growth situation where recommendations in this NTMP are implemented. The third is for high growth estimates. It assumes that the environment for doing business in Lesotho will be significantly improved to approximately the same level as leading comparator countries in SADC. Coupled with adequate promotional and other support from the GoL the high growth estimates can be achieved.

The first and key task in creating the Scenarios has been to establish a plausible baseline data for 2018 showing sources of visitors, lengths of their stay and spending. Building on this, separate forecasts have been made for the four geographical markets; namely Africa, Asia, America and Europe, broken down into tourist and same day categories of visitors with tourists further analysed by broad purpose of travel namely Leisure, Business and VFR. Individual lengths of stay are estimated from findings in LTDC Exit Surveys as are estimates of spending by visitors. Spending is shown in fixed 2017 prices.

It is important to note that, while projections for visitor arrivals for each region are based on the research undertaken, on the prospects for growth, and examined for each – they rely to a large degree on the recommendations in this Master Plan being implemented.

ECONOMIC ENVIRONMENT OF SOURCE MARKETS

The background of tourism situation situation in each of the source markets is summarised as follows:

AFRICA

'Africa' and the SADC region specifically is by far the most important tourism source market for Lesotho. It is estimated to be responsible for 93% of international visitor arrivals in 2018 and 80% of visitor receipts. South Africa alone accounts for 90% of arrivals and approximately 75% of receipts.

Economic recession and political events have resulted in significant falls in RSA inbound tourism. Economic recovery is expected in 2018 and 2019 and then continue to grow at a robust pace in the remainder of the decade. Supporting this, international forecasts show Sub -Saharan countries showing large economic growth in the long term. Leisure and business categories should act as long-term drivers of tourism. This recovery should improve the long-term outlook for discretionary spending thereby benefiting domestic tourism and neighbouring countries including Lesotho. Business travel will also recover with the reviving economy and be felt in expansion of business trips to Lesotho.

South African residents with social, economic and cultural ties to Lesotho will remain numerous. These will be replenished by continuing migration from Lesotho to South Africa of residents seeking employment and improved life styles. The numbers of persons visiting friends and relatives and making short excursion visits will increase at a low but steady rate over the decade.

ASIA

Long term economic forecasts point to the increasing dominance of Asia, with the emerging mega markets of China and India leading the expansion. Japan once the major source of Asian tourism has declined relative to these emerging source markets. IMF forecasts indicate strong growth in the region throughout the coming decade.

However there are risks to growth from geopolitical tension in the East Asian area and the subsequent knock-on impact on local and the world economy

CHINA

Sustainable growth is expected to pick up during the decade as China transitions from a maturing to a mature outbound tourism market with the profile becoming similar in that of traditional markets of Europe and America. The increasing popularity of Africa for investment, will see an increase in business tourism. Experiences elsewhere indicate that growth in Chinese leisure tourism will result in the average length of stay increasing. Very careful analysis of Chinese travellers' motivation to travel and, most vitally, product requirements, before embarking on or even thinking about any marketing activity.

INDIA

In the long run, the Indian economy is expected to grow, supporting its outbound tourism prospects. India holds much promise as an emerging market in the, long term future although whether for Lesotho remains for deep and robust research and analysis. With India's current population at 1.3 billion the general outbound potential is large. The United Nations forecasts India set to overtake China as the most populous country in 2022. Increasing liberalisation of the economy will see a rapid increase in incomes along with the cohort of middle class – a group most likely to travel. The long established Indo-African links will continue to support the expansion of the trade, leisure and VFR categories of visitors. However, India's average income and GDP per capita is much lower than other emerging regions, reducing the total available volume in the market that have the ability to travel abroad in the short term.

Very careful analysis of Indian travellers' motivation to travel and, most vitally, product requirements, before embarking on or even thinking about any marketing activity.

JAPAN

Japan is experiencing an economic recovery which should continue into the next decade. However, a contracting labour force will restrict growth in Japanese visitors to the Region in the short-to-medium term.

NORTH AMERICA

Growth in visitor arrivals is expected to be strong in the immediate future, boosted by public response to tax cuts. The improving economy, stronger US dollar and the increase in the retired population (who tend to have the biggest travel budget) are expected to boost spending of US visitors. Marketing, airline economics and increasing capacity on key routes will also help de-

termine how many US visitors will visit Southern Africa. A key factor will be the increase in direct air services. At the moment there are only two airports (Atlanta and New York) with direct air services to the region. Growth forecasts assume new direct air services will operate to unlock the potential of the Mid West and West Coast areas.

EUROPE

According to the IMF, growth rates for many of the euro area economies have been revised up, especially for Germany, Italy, and the Netherlands, reflecting the stronger momentum in domestic demand and higher external demand. The situation of the UK remains fraught with the impact arising from the decision to leave the EU and the ensuing depreciation of sterling, expected to depress demand for foreign travel. 'Staycations' (holidaying in the UK as a preference to travelling abroad) is emerging as a domestic phenomenon. An increase in trade barriers and regulatory realignments arising from 'Brexit' could weigh on global investment and reduce production efficiency, exerting a drag on potential growth in emerging markets and developing economies.

UK

The UK's economic growth is expected to weaken in 2018 and 2019. Private consumption is projected to remain subdued as higher inflation, pushed up by the depreciation of sterling, holds back household purchasing power. The unemployment rate is at a record low, but with slower growth this is unlikely to persist. Exchange rate depreciation will lower demand for foreign travel. An agreement about a transition period linked to the EU exit after March 2019 is assumed and should support growth in 2019 and in 2020, reducing the extent to which uncertainty weighs on domestic spending.

GERMANY

German economic growth is projected to remain solid and employment is set to expand further. Stronger activity in the Euro area is boosting exports and business investment. Household consumption and residential investment are relatively strong and expected to pick up. These factors are likely to keep growth in German visitor arrivals strong for the next two to three years. This augers well for Lesotho as South Africa has long connections to German speaking nations and DMCs have a very long history and connections throughout the German speaking markets. Cultural heritage and pristine nature have strong appeal to this source market.

ASSUMED GROWTH RATES

In Table 11 the rates of growth for the three low, medium and high growth scenarios are shown broken down by purpose of the visit namely Leisure, Business, VFR and Excursionists or day visitors. The specific annual growth rates for the main categories of visitation in the three growth scenarios are shown in Table 11.

Table 11 – Twenty year visitor growth rates - 2018-2038

		Low %	Medium %	High %
Leisure		2.6	5.1	6.6
of which	Africa	2	4	5
	America	4	7	9
	Asia	5	8	10
	Europe	4	6	8
Business		2	3	4
VFR		1	2	3
Excursion		1	1	2

Note: Growth rates for business, VFR and excursion categories apply equally to all visitors irrespective geographic.

Fig. 14 – Maletsuyane water falls

5.2.1 Low Growth Projections

ASSUMPTIONS

(a) Continuation of growth patterns of recent years and in line with international growth projections.

(b) No change in the average per-diem spending of tourists.

(c) No increase in the length of stay.

Table 12 – Low growth scenario – estimation of visitors, days and spending

| | Source* | Visitor numbers | | | | | Days in Lesotho | | | | Spending | | | | | |
| | | Tourists | | | Day | All | Tourists | | | | Tourists | | | | Day | All |
		Leisure (k)	Business (k)	VFR (k)	Visitors (k)	Visitors (k)	Leisure (k)	Business (k)	VFR (k)	Total (k)	Leisure LSL (k)	Business LSL (k)	VFR LSL (k)	Total LSL (k)	Visitors LSL (k)	Visitors LSL (k)
2018	Africa	71	30	296	611	1,008	176	91	2,664	2,931	158,722	72,559	266,400	497,681	183,295	680,976
	America	6	1	1	3	10	15	4	5	24	42,189	19,889	900	62,978	2,283	65,261
	Asia	15	6	1	8	30	36	18	12	67	1,512	416	270	2,198	9	2,207
	Europe	20	5	2	9	35	50	15	18	82	59,472	16,355	1,800	77,627	2,586	80,213
	Total	**111**	**43**	**300**	**630**	**1,084**	**278**	**129**	**2,700**	**3,107**	**277,183**	**113,423**	**269,820**	**660,426**	**188,842**	**849,268**
2023	Africa	76	32	306	632	1,047	189	97	2,757	3,043	170,307	77,855	275,690	497,681	189,687	713,539
	America	7	2	1	3	12	17	5	6	27	36,747	15,212	799	52,759	1,800	54,559
	Asia	18	7	1	8	33	44	20	12	76	24,734	8,527	611	33,871	850	34,721
	Europe	22	5	2	9	38	55	16	19	90	66,289	17,549	1,863	85,700	2,676	88,377
	Total	**123**	**46**	**310**	**652**	**1,131**	**307**	**138**	**2,794**	**3,239**	**308,929**	**122,227**	**279,295**	**684,280**	**195,481**	**905,932**
	5 Yr Growth	10.30	7.30	3.49	3.49	4.34	10.30	7.30	3.49	4.26	11.45	7.76	3.51	3.61	3.52	6.67
2028	Africa	86	37	327	675	1,125	215	111	2,943	3,268	193,481	88,449	294,271	576,201	202,472	778,673
	America	9	2	1	3	14	22	5	6	33	25,863	5,857	596	32,316	835	33,151
	Asia	24	8	1	8	41	59	23	13	95	71,184	24,752	1,292	97,228	2,532	99,760
	Europe	27	6	2	10	44	67	18	20	105	79,925	19,936	1,988	101,850	2,857	104,707
	Total	**146**	**52**	**331**	**696**	**1,225**	**364**	**157**	**2,982**	**3,504**	**372,430**	**139,838**	**298,248**	**810,516**	**208,762**	**1,019,278**
	10 Yr Growth	31%	22%	10%	10%	13%	31%	22%	10%	13%	34%	23%	11%	23%	11%	20%
2038	Africa	105	45	361	746	1,255	262	135	3,251	3,644	235,853	107,818	325,059	667,110	223,655	890,387
	America	13	2	1	3	18	32	6	7	44	15,855	1,725	395	16,583	305	16,840
	Asia	39	9	2	9	57	97	27	14	135	3,351,328	1,473,400	6,186	4,301,274	712,220	4,509,731
	Europe	36	7	2	11	56	90	22	22	133	107,413	24,302	2,196	133,632	3,155	136,680
	Total	**191**	**64**	**366**	**769**	**1,385**	**477**	**192**	**3,295**	**3,951**	**500,405**	**172,406**	**329,671**	**994,716**	**230,782**	**1,223,320**
	20yr Growth	171%	149%	122%	122%	128%	171%	149%	122%	127%	181%	152%	122%	151%	122%	144%

* Note : Unidentified and visitor from other areas included in totals.

5.2.2 Medium Growth Projections

ASSUMPTIONS

(a) Increase in spending per night of one percentage point per annum.

(b) Increase in the length of stay for Leisure Tourism of 2.5% per annum: other categories remain unchanged.

(c) Assumes that recommended tourism initiatives in the National Tourism Development Plan are implemented.

Table 13 – Medium growth scenario – estimation of visitors, days and spending

Source *	Visitor numbers					Days in Lesotho				Spending					
	Tourists			Day	All	Tourists				Tourists				Day	All
	Leisure (k)	Business (k)	VFR (k)	Visitors (k)	Visitors (k)	Leisure (k)	Business (k)	VFR (k)	Total (k)	Leisure LSL (k)	Business LSL (k)	VFR LSL (k)	Total LSL (k)	Visitors LSL (k)	Visitors LSL (k)
2018 Africa	71	30	296	611	1,008	176	91	2,664	2,931	158,722	72,559	266,400	497,681	183,295	680,976
America	6	1	1	3	10	15	4	5	24	17,472	4,805	540	22,817	756	23,573
Asia	15	6	1	8	30	36	18	12	67	43,701	20,305	1,170	65,176	2,292	67,468
Europe	20	5	2	9	35	50	15	18	82	59,472	16,355	1,800	77,627	2,586	80,213
Total	**111**	**43**	**300**	**630**	**1,084**	**278**	**129**	**2,700**	**3,107**	**280,837**	**114,716**	**270,000**	**665,553**	**188,989**	**854,543**
2023 Africa	82	34	318	433	866	229	101	2,858	3,188	216,085	84,126	296,668	596,879	204,121	801,001
America	8	2	1	10	20	22	5	6	33	27,779	5,571	601	33,951	842	34,793
Asia	20	7	1	28	57	58	21	13	91	73,414	23,542	1,303	98,259	2,552	100,811
Europe	25	6	2	33	65	71	17	19	107	89,635	18,962	2,005	110,601	2,880	113,481
Total	**135**	**48**	**322**	**505**	**1,010**	**381**	**144**	**2,897**	**3,422**	**408,914**	**133,004**	**300,677**	**842,596**	**210,462**	**1,053,058**
5 Yr Growth	22%	11%	7%	-20%	-7%	37%	11%	7%	10%	46%	16%	11%	27%	11%	23%
2028 Africa	104	41	361	745	1,251	334	122	3,247	3,703	330,828	107,264	357,214	795,306	245,779	1,041,086
America	11	2	1	3	17	37	6	7	49	48,396	7,103	724	56,223	1,014	57,237
Asia	31	8	2	9	51	101	25	14	140	132,850	30,017	1,569	164,435	3,073	167,509
Europe	36	7	2	11	55	114	20	22	156	149,969	24,177	2,414	176,560	3,468	180,028
Total	**184**	**58**	**366**	**768**	**1,375**	**587**	**173**	**3,291**	**4,052**	**665,107**	**169,586**	**362,041**	**1,196,735**	**253,414**	**1,450,149**
10 Yr Growth	65%	34%	22%	22%	27%	111%	34%	22%	30%	137%	48%	34%	80%	34%	70%
2038 Africa	155	55	440	908	1,552	633	164	3,959	4,679	689,552	158,569	478,986	1,270,919	329,564	1,591,626
America	23	3	1	4	29	92	8	8	99	134,054	10,500	971	138,541	1,359	138,977
Asia	68	11	2	11	86	278	33	17	293	403,858	44,374	2,104	414,862	4,121	415,889
Europe	64	9	3	13	86	260	27	27	293	378,175	35,742	3,236	401,583	4,650	404,051
Other/unknown	1	0	0	0	2	4	1	1	7	6,386	1,514	162	7,864	108	7,955
Total	**303**	**78**	**446**	**936**	**1,744**	**1,241**	**233**	**4,012**	**5,284**	**1,575,175**	**250,700**	**485,459**	**2,151,854**	**339,802**	**2,460,886**
20yr Growth	172%	81%	49%	49%	61%	346%	81%	49%	70%	461%	119%	80%	223%	80%	188%

* Note : Unidentified and visitor from other areas included in totals.

5.2.3 High Growth Projections

ASSUMPTIONS

(a) Compared with Low Growth Scenario it involves a tripling of growth for leisure tourism and doubling for others.

(b) Increase in spending by all categories of visitors by one percentage point per annum.

(c) Increase in length of stay for Leisure Tourism of 5% per annum; others remain unchanged.

(d) Assumes that recommended tourism initiatives in the National Tourism Development Plan are implemented the GoL invest in the, stated, priority of tourism as a National Pillar of economic recovery and the environment for doing business improves to equal that of leading countries in SADC.

Table 14 – High Growth scenario – estimation of visitors, days and spending

Source *	Visitor numbers					Days in Lesotho				Spending					
	Tourists			Day	All	Tourists				Tourists				Day	All
	Leisure (k)	Business (k)	VFR (k)	Visitors (k)	Visitors (k)	Leisure (k)	Business (k)	VFR (k)	Total (k)	Leisure LSL (k)	Business LSL (k)	VFR LSL (k)	Total LSL (k)	Visitors LSL (k)	Visitors LSL (k)
2018 Africa	71	30	296	611	1,008	176	91	2,664	2,931	158,722	72,559	266,400	497,681	183,295	680,976
America	6	1	1	3	10	15	4	5	24	17,472	4,805	540	22,817	756	23,573
Asia	15	6	1	8	30	36	18	12	67	43,701	20,305	1,170	65,176	2,292	67,468
Europe	20	5	2	9	35	50	15	18	82	59,472	16,355	1,800	77,627	2,586	80,213
Total	**111**	**43**	**300**	**630**	**1,084**	**278**	**129**	**2,700**	**3,107**	**280,837**	**114,716**	**270,000**	**665,553**	**188,989**	**854,543**
2023 Africa	85	35	330	681	1,131	274	105	2,969	3,348	260,222	87,753	308,870	656,844	212,516	869,360
America	8	2	1	3	14	28	5	6	40	36,350	5,811	626	42,787	877	43,664
Asia	22	7	1	9	39	76	21	13	110	96,828	24,557	1,357	122,741	2,657	125,398
Europe	27	6	2	10	45	91	17	20	128	116,328	19,780	2,087	138,195	2,998	141,193
Total	**144**	**50**	**334**	**702**	**1,231**	**471**	**150**	**3,009**	**3,630**	**512,138**	**138,738**	**313,043**	**963,919**	**219,118**	**1,183,037**
5 Yr Growth	30%	16%	11%	11%	14%	69%	16%	11%	17%	82%	21%	16%	45%	16%	38%
2028 Africa	115	45	398	821	1,379	468	134	3,580	4,182	463,251	118,145	393,821	975,217	270,967	1,246,184
America	14	2	1	3	20	56	6	7	70	74,113	7,824	798	82,735	1,118	83,852
Asia	38	9	2	10	59	154	27	16	197	203,097	33,062	1,730	237,889	3,388	241,277
Europe	43	7	3	12	64	174	22	24	220	230,057	26,630	2,661	259,348	3,823	263,171
Total	**210**	**64**	**403**	**847**	**1,524**	**855**	**191**	**3,629**	**4,675**	**974,809**	**186,789**	**399,143**	**1,560,741**	**279,384**	**1,840,125**
10 Yr Growth	89%	48%	34%	34%	41%	208%	48%	34%	50%	247%	63%	48%	135%	48%	115%
2038 Africa	187	66	535	1,104	1,886	1,242	199	4,811	5,968	1,352,057	192,372	582,189	1,910,961	400,572	2,280,513
America	33	3	1	5	39	217	10	10	201	314,372	12,739	1,180	299,999	1,652	298,276
Asia	98	13	2	14	117	650	40	21	582	943,879	53,834	2,557	868,281	5,009	862,848
Europe	92	11	4	16	117	613	33	33	590	889,936	43,361	3,934	866,472	5,651	863,441
Total	**397**	**94**	**542**	**1,138**	**2,141**	**2,631**	**283**	**4,877**	**7,034**	**3,383,639**	**304,142**	**590,057**	**3,659,978**	**413,016**	**3,962,423**
20yr Growth	257%	119%	81%	81%	97%	846%	119%	81%	126%	1105%	165%	119%	450%	119%	364%

* Note : Unidentified and visitor from other areas included in totals.

5.2.4 Estimating room capacity needed

CURRENT SITUATION - CAPACITIES

The base line figures for estimated for 2018 as being equal to those for 2017.

Table 16 – Capacities and occupancies of accommodation 2018

Room types	Guest nights			Annual	
	Local	Non Local	Total	Beds	Bed Occ %
Hotel	139,494	100,286	239,780	646,050	37.1
Lodge	40,771	43,825	84,596	498,225	17.0
B+B	15,124	10,169	25,293	146,365	17.3
GH	108,121	42,221	150,342	593,125	25.3
Other	42,344	7,373	43,081	627,800	7.9
Total	**345,854**	**203,874**	**549,728**	**2,511,565**	**21.9**

Source: Estimated as unchanged from LTDC Annual Report for 2017

Using average growth in bed-nights for Leisure and Business tourists over the 20 year period estimates of room requirements, bed-nights and occupancy rates to permit the anticipated growth bed nights to be accommodated, are shown in Table 15.

— The bases for the projected demand for accommodation are:

— Foreign Residents; Increases in the bed-nights of visitor leisure and business tourists

— Local Residents: Increase of 2% per annum low growth scenario, 2.5% per annum in the medium growth scenario and 3% high growth.

— It is assumed that an annual bed capacity of 40% (equating to 60% room occupancy) would trigger investment to cope with an expansion of capacity in the particular accommodation category.

Sufficient capacity exists in the sector to accommodated growth in the five year period to 2023. Increasingly thereafter growth will be possible only if capacity is increased to the extent that bed-occupancies never go above 40% with investors attracted to provided the shortfalls in capacities.

Table 15 – Room requirement and indicative costs - 40% maximum bed occupancy applies

	Rooms						Capital Costs	
	2018	2028		2038		20 yr	2028	2038
		Additional	Total	Additional	Total	Growth	$ (m)	$ (m)
Low Growth								
Hotels/lodges	1904	156	2,060	438	2,342	23%	16	44
GH, B&B etc	1596	0	1,596	–	1,596	0%	0	0
Total	**3500**	**156**	**3,656**	**438**	**3,938**	**13%**	**16**	**44**
Medium Growth								
Hotels/lodges	1904	499	2,403	2,181	4,085	115%	50	218
GH, B&B etc	1596	188	1,784	1,491	3,087	93%	11	89
Total	**3500**	**687**	**4,187**	**3,672**	**7,172**	**105%**	**22**	**308**
High Growth								
Hotels/lodges	1904	670	2,574	4,371	6,275	230%	67	437
GH, B&B etc	1596	320	1,916	3,557	5,153	223%	32	213
Total	**3500**	**990**	**4,490**	**7,927**	**11,427**	**226%**	**99**	**650**

The indication for the costs of the extra rooms is based on $100,000 construction costs per room for Hotels and Lodges and $60,000 average room costs for other forms of accommodation.

5.2.5 Employment

Employment in the accommodation sector for 2017 is shown in Table 17 An unchanged situation is estimated for 2018. The data is broken down into skilled and unskilled in approximately equal proportions (49:51). No analysis is available as to the nature of employment i.e. the extent to which jobs are of a full time, part time or casual nature. The ratio of employees per room is shown as 0.9 for hotels and lodges and 0.65 for other forms of accommodation.

Table 17 – Employment in the accommodation sector in 2017

Accommodation type	Employees			Employees per Room		
	Skilled	Unskilled	Total	Skilled	Unskilled	Total
Hotel	529	578	1,107	0.42	0.46	0.90
Lodge	275	345	620	0.39	0.49	0.90
B+B	63	74	137	0.25	0.30	0.56
GH	400	271	671	0.41	0.28	0.70
Other	90	139	229	0.21	0.33	0.55
Total	**1,357**	**1,407**	**2,764**	**0.38**	**0.39**	**0.79**

Source: Estimated as unchanged from LTDC Annual Report for 2017

Table 18 shows the impact, on job creation, of the progression of increasing ratios of jobs per room from 0.79 in 2018 to 0.92 in 2038 that will be required relative to the growth of visitors and their room requirements. This increase in ratios when applied to increases in rooms indicates increases in employment by 2038 of 30% in the low growth situation, 137% with medium growth and 275% with high growth. In numerical terms 855, 3,791 and 7,633 respectively.

There is, in 2017/8, a high degree of under employment in the sector arising from the existing low occupancy rates evidencing a likely element of over staffing. It should be possible to accommodate increases in demand in the existing stock of rooms without a proportionate increase in employees. The requirement for personnel will accelerate thereafter as annual occupancy rise towards 60% room and further development takes place.

Additional direct jobs in the accommodation sector are projected to be required towards the end of the first 5 year period and into the second 5 year period, in both the Medium and High Growth scenario projections, to accommodate anticipated visitor volumes and length of stay. Hotels and other accommodation owners will need to start gearing up for additional staff by then.

Table 18 – Projections of employment growth in the accommodation sector - 2018-2038

	2018			2023			2028			2038		
	Rooms	Jobs per Rm	Jobs	Rooms	Jobs per Rm	Jobs	Rooms	Jobs per Rm	Jobs	Rooms	Jobs per Rm	Jobs
Low Growth												
Hotels/lodges	1,904	0.90	1,727	1,904	0.90	1,714	2,060	1.00	2,060	2,342	1.00	2,342
GH, B&B etc	1,596	0.65	1,037	1,596	0.65	1,037	1,596	0.70	1,117	1,596	0.80	1,277
Total	**3,500**	**0.79**	**2,764**	**3,500**	**0.79**	**2,751**	**3,656**	**0.87**	**3,177**	**3,938**	**0.91**	**3,619**
Medium Growth												
Hotels/lodges	1,904	0.90	1,727	1,904	0.95	1,809	2,403	1.00	2,403	4,085	1.00	4,085
GH, B&B etc	1,596	0.65	1,037	1,596	0.70	1,117	1,784	0.75	1,338	3,087	0.80	2,470
Total	**3,500**	**0.79**	**2,764**	**3,500**	**0.84**	**2,926**	**4,187**	**0.89**	**3,741**	**7,172**	**0.91**	**6,555**
High Growth												
Hotels/lodges	1,904	0.90	1,727	1,904	1.00	1,904	2,574	1.00	2,574	6,275	1.00	6,275
GH, B&B etc	1,596	0.65	1,037	1,596	0.75	1,197	1,916	0.80	1,533	5,153	0.80	4,122
Total	**3,500**	**0.79**	**2,764**	**3,500**	**0.89**	**3,101**	**4,490**	**0.91**	**4,107**	**11,427**	**0.91**	**10,397**

6. Growth Strategies and Strategic Framework

6.1 Ensure an appropriate institutional and legal framework

6.1.1 Research and statistics

RESEARCH

Efficient decision making by all destination marketing entities, LTDC and Private Sector partners mainly, as well as implementation of policy, requires accurate information on existing and potential tourism to Lesotho, covering a variety of factors including basic data on the purpose of journey, origins, products used, travel arrangements, activities engaged in satisfaction/dissatisfaction levels, spending and related data. This will require Lesotho statistical authorities to conduct audits of all arrivals and departures and to conduct an ongoing sample survey on departing visitors.

There is a need to collect and publicize more detailed up to-date data on the tourism sector including sector-specific information on the contribution of tourism to the economy. In this regard, the focus in data collection efforts should include the following areas:

- the total value of tourism sector imports and exports and by tourism sub-sector;
- the value of inward flows of FDI into the tourism sector;
- determination of tourism's contribution to the economy in terms of personal income, employment taxation, and investment construction of a Tourism Satellite Account;
- quantification on the benefits and costs of tourism to communities; and
- as a first step, detailed information of spending by visitors by category is needed.

Research and analysis of data, downstream in the Tourism Value Chain, is to be the joint responsibility of MTEC and the LTDC and designed to explore the existing linkages between tourism and other sectors of the economy to determine the extent to which tourism has contributed to the growth of sectors such as construction, agriculture and retail, as well as the current levels of consumption of financial, recreational, cultural and security services by tourists.

STATISTICS

The Lesotho Bureau of Statistics (LBS) neither collects nor publishes statistics on the cross border movements of travellers nor on their spending or profiles nor on domestic tourism. The LTDC collects data on usage and spending on licensed tourism accommodation separately by local and non-local residents together with employment numbers. It uses the good offices of 'Statistics South South Africa' to provide a head count of visitors by country of residence returning from Lesotho. Information from both surveys is published in an Annual Tourism Report. The information is complemented by periodic sample surveys of departing visitors to ascertain information on the profiles, activities, estimated spending and satisfaction/dissatisfaction levels with Lesotho.

The key information needed for planning purposes is to disaggregated visitor numbers (1.137 million in 2017) into same day visitors and then those staying longer with data on purpose-of-journey, length-of-stay, spending identified. If the South African Authorities cannot collect disaggregated information, the task should revert to being performed in Lesotho by the Lesotho Bureau of Statistics (LBS) collecting basic data on arrival and departure data. This should be supplemented by an EXIT survey of travellers conducted on a continuous year round basis and the results integrated into data yielded by visitor arrival/departure statistics.

The data produced should be such as to permit quantified targets to be set for tourism initiatives and thereafter performance measured and to be used with confidence in businesses planning investments or undertaking initiatives.

There is no official estimate of the value of tourism. While the Central Bank of Lesotho (CBL) publishes estimates on spending in 'transportation and storage' (M 710 m in 2017) and 'accommodation and food service activities' (M 975 m in 2017) sectors of the economy, there is no overall estimate of the income from tourism. A formula for the creation of an estimate is needed to be administered either by the CBL or the LTDC.

More detailed and up to-date data on the tourism sector including sector-specific information on the contribution of tourism to the economy, is needed to be collected and publicized.

ACTIONS

a. MTEC will collaborate with responsible Government departments to develop a statistical base that identifies disaggregated visitor numbers that will identify same day excursionists and tourists and separately.

b. MTEC will work with the CBL to produce official estimates for the value of tourism.

c. MTEC and LTDC will finalise the TSAs in the 1st and 2nd years of this NTMP and conduct analysis, at LTDC, of the relative contribution of indirect stakeholders in the Value Chain. This will form the basis of the priority of partners and ongoing planning as recommended in 7.1.5, and provide quantitative and ongoing, consistent, empirical data to support budgetary planning across the Ministries' in the partnership.

d. MTEC and LTDC will work to create identical sections on each other's web presence, updated monthly, and that the general public and travel trade are well informed of the state of tourism in the country.

6.1.2 Roles, responsibilities and public/private collaboration

RESPECTIVE ROLES OF MTEC AND LTDC

This NTMP is based on the assumption that the respective roles and responsibilities of the MTEC (as the NTA) and of the LTDC (as the NTO) are clarified by the Tourism Act, thus eliminating the potential for any confusion, duplication of efforts and gaps in tourism service delivery.

TOURISM DEPARTMENT OF MTEC – POLICY AND FUNCTIONS

Under this NTMP, accompanying Policy and Legal Framework the MTEC is responsible for formulation enhancement of sectoral policy and the development of a sound legal framework to develop the sector and regulatory functions. It is not responsible for product development or marketing but, rather, to ensure and facilitate the overarching framework for the LTDC and private sector for these functions.

LTDC – POLICY AND FUNCTIONS

The LTDC is the implementing arm of the MTEC and, as such, it is the focal point and driving force for tourism development in the country. It was established 'to facilitate the sector through licensing and regulation, providing training and developing tourism infrastructure'[5].

LCT – POLICY AND FUNCTIONS

The Lesotho Council of Tourism (LCT) acts as an apex organisation, it seeks to represent the private sector in defending the interests of its members, improving the quality of the product and assisting in promotion. Meant to empower operators in terms of organizing themselves, accessing finance, lobbying for government assistance and facilitating improvements to the business environment. Policy and purpose are at present under review although it is expected to be revitalised, to play a pivotal role; acting as the voice of the private sector, between the MTEC and LTDC functions in the life of the first period of the NTMP.

PRIVATE SECTOR TOURISM ASSOCIATIONS

MTEC policy is to empower industry associations to play a more prominent role in tourism development. There are five associations representing business and activities in the tourism sector namely the Lesotho Hotel and Hospitality Association (the largest and most active), the Tour Operators Association of

Lesotho, the Association of Travel Agents of Lesotho, the Mountain Kingdom Tour Guides Association and the Lesotho Chefs Association. Collaboratively with them, the LTDC and MTEC a strategy is necessary to address how they can be empowered to better serve their members. Ideally, they should all be members of the LCT to provide a united, coherent and positive contribution.

INVESTMENT

MTEC (and other economic ministries) are required to devote energies and efforts to stimulate private investment. Government recognises the need to encourage investment in tourism, modernise existing facilities, expand capacities and develop new products. It recognises that this must be sourced from the private sector and so policy is to create an enabling and supportive environment for investors. Accordingly the MTEC and LTDC will devote energies and efforts to encourage private investment acting rather than getting into business themselves. Policy will permit serious private investors to be supported when investing even if public money is involved.

Recognising too that the prospect of investment from internal sources is limited, foreign direct investment (FDI) will be encouraged by offering incentives no less attractive than those available in other SADC administrations. The possibility of harmonisation of incentives available for international tourism with those applicable for the export of manufactured goods and the possibility of introducing incentives to encourage investment in community projects will be examined. Such incentives could include, for example, reduced tax rates for tourism enterprises, similar to those that exist for manufacturing industries. The MTEC will work with the Ministry of Finance for such a tax policy to be implemented.

Section 6.6 presents the essential business environment requirements for successful and sustainable destination development in further detail.

ACTIONS

a. MTEC and the LTDC will, when preparing annual operational plans and as part of the planning process, convene quarterly cross-departmental planning sessions, ensuring environmental and cultural aspects are covered, to ensure that implementation plans are not only policy compliant but also complimentary to each other.

b. Additionally, an annual working session will be convened to determine: a) annual action plans and b) update the NTMP to retain its five year structure and integrity.

c. MTEC and LTDC will hold regular quarterly working sessions together to update each other on achievements, hurdles and issues so that both the MTEC authorities and the LTDC Board may be appraised on successes and where escalation of issues is required.

d. Departments of Environment and Culture with LTDC will convene on a regular basis in order to structure complimentary plans and support each other's goals.

6.1.3 Policy

An updated Tourism Policy has been evolved as part of the masterplanning process ensuring that these two important documents are harmonised.

Government recognises that tourism is an important sector of the nation's economy with considerable potential for growth. It is one of the three priority areas, declared by the GoL; Tourism, Technology and Infrastructure, as those having the most potential to stimulate growth, and leverage cross sectoral collaboration, in the economy by creating jobs and maintaining national stability.

Tourism is not just concerned with foreign tourists on holidays staying in hotels. It is pervasive and includes all people whether resident abroad or at home travelling for holiday or business purposes or indeed to visit friends or relatives or many other possible reasons. It is not a discrete sector which can be the responsibility solely of any one ministry and so a national tourism policy must be more than just that of a ministry responsible for tourism.

Many policies guiding the development of tourism are of a cross-cutting nature and many ministries have a responsibility in some way in creating the basket of goods and services purchased or used by tourists. It is important therefore that their roles are recognised and respond with suitably amended policies if needed. Policies and strategies of the MTEC and those for which other ministries or bodies have responsibilities are taken into account in drafting this national tourism policy.

The policy is a statement of overarching guiding principles that are not intended for direct implementation, but to provide general guidance and guidelines to other processes, including the preparation of the National Tourism NTMP and other ancillary

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[5] However, currently Licensing and Regualtion are the functions of the MTEC.

planning documents. Therefore, overlapping of the policy with other planning documents, above all the National Tourism NTMP, has been reduced to a minimum. The 'family' of three documents is relevant and should be read in conjunction with each other' Policy, Legal Framework and NTMP. All are synergistic and, whilst stand alone, are not mutually exclusive.

It has also been produced with other objectives in mind namely to provide (i) would-be investors with a guide to government tourism policy and (ii) other ministries and agencies on the direction of tourism and role expected of them and (iii) a framework to reflect other Ministries' and Departments' policies that have, or should have, a tourism interface.

The Policy is organized around the same seven strategic pillars as this NTMP for ease of reference and cross referred to in the Legal Framework.

A broad view on what constitutes a policy is taken i.e. whether it has been determined in the National Constitution, legislation, guidelines, good practice or common acceptance. In some instances it also includes policies to guide strategies implementing superior policies.

ACTIONS
a. MTEC will prepare the 2019 Tourism Policy to go forward to Cabinet and be enacted in 2019.

b. Adopt the new Policy as the overarching guide for tourism development and be linked, directly, to the actions in 6.1.5 to ensure full cross sectoral coherence and related budgetary procedures and efficient dispersal of scare resources.

c. Develop and maintain a communications protocol; electronic web-based and regular awareness press releases, to publicise all Policy, Legislation and Action plans to the general public and the travel industry.

6.1.4 Tourism act

The Draft Law, to be ratified at Cabinet, and accompanying Regulations addresses the need for a comprehensive legal framework, brings the framework in to the 21st Century and in line with other progressive SADC members by subscribing to the overarching principles of Responsible Tourism as decided by the GoL for the NTMP, Policy and Legal Framework. It is drafted bearing in mind the importance of using international best practice in the use of terminology, information gathering and statist-

ics for legal purposes but also to facilitate tourism satellite accounting.

The Draft Act alone will not address the need for a better regulatory environment for tourism development. The Tourism Policy emphasises the importance of developing the professional and trade associations in the tourism sector. Self-regulation and the use of soft law mechanisms together with a framework of consumer protection law, based on international conventions, will help to build the confidence of the foreign traveller booking tourism services in the kingdom. The need to professionalise inspection and the adoption of a positive compliance approach must also be addressed.

The Draft Act provides for three possibilities:

— a major amendment of the existing Act with these provisions;

— retention of parts of the old Act and a new Tourism Act;

— replacement of all with a comprehensive new Tourism Act.

ACTIONS
a. MTEC to evolve the 2018 Draft legal Provisions for the Tourism Act to be developed and go forward to Cabinet, as a priority, and be enacted during 2019.

6.1.5 Institutional collaboration

PUBLIC SECTOR

The Ministry of Tourism, Environment and Culture is the lead body with responsibilities for the orderly development and regulation of tourism in Lesotho. Together with its implementing agency the Lesotho Tourism Development Corporation (LTDC), it has direct responsibilities covering tourism policy formulation and thereafter strategy implementation in areas of product development, promotion, accommodation, environment and culture and jointly with the Lesotho National Development Corporation for investment in tourism. Implementation of other important aspects of tourism such as infrastructure, security, transport, employment, taxation and training, is the responsibility of other ministries and agencies in the value chain of the Tourism Economy. They are:

Table 19 – Priority ministries in the value chain of the tourism economy

Ministries	Tourism issues/responsibilities
Communications, Science & Technology	Improved mobile, internet and other (future) communications systems
Development Planning	Cooperation in planning
Education and Training	Improve skills and education in the sector
Energy	Reduce power failures and lower costs
Finance	Budgets. Taxation, Funding, Incentives
Foreign Affairs and International Relations	Assistance in promotion, Visa issues
Forestry and Land Reclamation	Improved and land improvement, environment
Gender and Youth, Sports and Recreation	Sports and recreation of interests to visitors improved
Health	Health services for tourists
Home Affairs	Visitor entry issues, internal movement
Labour and Employment	Improved skills, worker rights and wrongs
Local Government and Chieftainship Affairs	Infrastructure, Improved involvement of communities in tourism
Police and Public Safety	Security/Safety of tourists,
Public Works and Transport	Improved roads, Infrastructure, Waste disposal
Small Business Development, Co-operatives & Mkt.	Community development, business support
Trade and Industry	Licensing, investment
Water Affairs	Water/Waste water

INTER-MINISTRY COOPERATION

While the MTEC will have direct responsibility for formulation of policies relating to activities which are perceived as being tourism, a mechanism is needed to ensure that other ministries and agencies with powers to address issues in tourism, are duly conscious of the responsibilities, suitably motivated and responsive.

A broad, multi-sectoral approach is required involving coordination between the MTEC and other ministries and institutions. This can also help tourism development to serve as a catalyst for overall economic development. In this way, policy aims to reduce the current leakages that are taking place, whereby most produce is imported into the country from South Africa. Collaboration is also required with institutions such as the electricity and water authorities. All stakeholders should have a forum for information sharing and joint planning so that all of their initiatives correlate.

In formulating annual budgets, the Finance and Budget Committee requires ministries to work together and be in constant dialogue with the business sector. This might require memoranda of understanding drafted between the MTEC/LTDC and other institutions with tourism responsibilities to permit harmonious cooperation and avoidance of duplication.

Given the broad reach of tourism, as discussed throughout this Plan, presented in the tourism value chain (→ see section 3.3), and the priority given it to create growth and employment, consideration should be given to a change in the budgeting process to have a 'budget line' dedicated to tourism introduced into the budgets of ministries and agencies which have responsibilities for aspects of developing the tourism product.

A second innovation in policy would involve the Tourism Fund when operational, to be used to provide financial assistance to Ministries, District administrations and agencies to fulfil their obligations in partly funding selected capital projects that are directly connected to the sustainability of tourism. Fund management composition, rules and structure will identify application and award processes.

ACTIONS
a. MTEC and LTDC to develop a list of key and priority Ministries' that are critical with which to partner in the implementation of the NTMP.

b. Work with the Ministry responsible to develop a cross-sectoral 'Tourism Development Policy and Budgeting Advisory Unit', chaired by the Finance and Budget Committee , with the express purpose of creating National synergy across Ministry budgeting priorities with the budget line 'tourism'. Consolidate and formalise the process with a cross sectoral MoU.

c. Ensure that governance measures are in place to capture, prioritise and disburse income from the Tourism Fund.

6.1.6 Regional co-operation and collaboration

Government recognises the benefits of close cooperation with South Africa and other states in the Region in developing tourism and related tourism initiatives aimed at increasing tourism spending. The substantial majority; more than 90%, of inbound tourists to Lesotho are either resident in the RSA or are visiting the region as part of a Southern African holiday or business trip.

Opportunities for fast track success include the pursuit of a joint development agenda between Lesotho and South Africa on a formal basis to:

− enhance the tourism experiences in visiting southern Africa;

− benefit from knowledge transfer and potential technical assistance, (the existing cooperation in the collection of tourism statistics is an example);

− forge links and partnerships between Lesotho private sector operators (and trade organisations) and their South African counterparts; and

− harmonise statistics.

With the same objectives in mind, the Government is to continue to participate in Southern Africa Development Community (SADC) and other regional initiatives, seeking to expand regional linkages with tourism sectors of neighbouring countries and promote Lesotho's best interests within the context of regional cooperation.

Cross border passenger operations between Lesotho and South Africa are regulated[6]. On-going challenges and conflicts on the RSA / Lesotho border have a negative impact on the efficiency and competitiveness of Lesotho's economy and test the value of SADC protocol on transport. MTEC policy is to support the Ministry of Public Works and Transport (MPWT) in its efforts to have the RSA Minister of Transport ensure that the law is en-

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[6] Regulated by the Southern African Customs Union Memorandum of Understanding on Road Transportation (SACU MoU) and Southern African Development Community (SADC) Protocol on Transport, Communications and Meteorology.

forced and Lesotho taxi and other regulated transport operators are permitted to to operate.

Ratification of 'RSA/Lesotho Agreement on the Facilitation of Cross Border Movements of Citizens' is needed.

The creation of seamless borders is critical for tourism. Within the ambit of the Joint Bilateral Commission for Cooperation (JBCC), Government will continue to improve border crossings.

Government will strive to achieve reciprocity with South Africa on tourism initiatives and seek to harmonise regulations impacting on tourism.

Government supports and therefore participates in the development of trans-frontier conservation areas as a means of fostering regional cooperation.

ACTIONS
a. MTEC to stimulate a collaborative process with the responsible Ministry of identifying and harmonising SADC cross border regulations in reciprocity with the Government of South Africa including border crossings and the natural trans-frontier conservation environment.

6.2 Improve visitors' experience

With Lesotho being positioned as an experiential tourism destination it is important to develop and address all aspects of the visitor experience to maximise visitor value and limiting potential inconveniences and risks.

6.2.1 Visitor experience approach

The overall visitor journey starts before the trip, as is clearly visualised in the Lesotho Value Chain diagram (→ see section 3.3) when visitors become aware of the destination, consider it as a travel option and get exposed to marketing and sales messages and procedures. "On-the-ground" visitor experiences are a critical component of the overall visitor journey. A single bad or broken link in the experience "chain" can negatively affect and even spoil the entire visitor journey. A holistic and integrated approach is required. The Lesotho Value Chain Matrix (VCM) has been developed, specifically for the purpose of illustrating this in the Lesotho context. It also indicates the need for tourism-focused internal policies in other Ministries that play key roles in the tourism value chain. Such Ministries should identify, with MTEC, their roles, responsibilities and fiscal appropriations for supporting tourism growth.

Key elements of the "in-destination" visitor experience include:

- Airport arrival and departure infrastructure and procedures
- Visa requirements and facilitation
- Immigration facilities and treatment at border posts
- Foreign exchange services
- Tourist transport and shuttle services
- Tour guiding and interpretation
- Road and interpretive signage
- Rest areas and facilities
- Health, hygiene and emergency services
- Visitor safety and security
- Customer service delivery

6.2.2 Airport arrival and departure

Maseru's Moshoeshoe International airport is due for a serious upgrade, not so much in size (depending on demand growth prospects) but in terms of services and infrastructure. The following aspects are among those that require improvement:

In the short term:

- immigration hall – organisation of immigration queues and procedures with health checks;
- custom checks – currently all bags are checked resulting in bottlenecks;
- ATM in arrivals hall;
- clear information regarding taxi/shuttle services;
- toilet and bathroom facilities, especially in departure area;
- airline lounge facility currently only for top banking clients of a particular brand; open up to others;
- variety and quality of refreshments and souvenirs in departure area.

In medium term, as and when plane sizes and frequencies increase:

- baggage handling and conveyer facilities;
- shopping opportunities in departure area.

ACTIONS

a. Implement a short term airport upgrade programme: conduct a thorough audit of airport facilities and services, identify gaps and shortcomings for servicing expected passenger levels over 2019-2021 and devise and execute a plan for upgrading the airport in accordance with the findings.

6.2.3 Visa and immigration requirements and facilities

As has been pointed visas are not required for visitors from Lesotho's key leisure tourism source markets. However significant, and rising, numbers of visitors from none-core, emerging, markets wish to enter Lesotho, especially as an, opportunists and unplanned, extension of their trips from Kwazulu Natal via Sani Top. The current visa cost of $150 is prohibitive and prevents citizens from countries for which visas are required to extend their travel into Lesotho. Introducing a visa on arrivals at main border posts patronised by leisure visitors will entice such citizens to extend their stay.

While immigration facilities and procedures at major border posts are of a good standard, basic facilities such as seating and toilet facilities at smaller border posts such as Sani Top, Qachas Neck that are often patronised by leisure tourists, are inadequate and in need of improvement.

ACTIONS

a. Collaborate with Ministry responsible to reduce visa costs for leisure visitors: Introduce an affordable "on arrival" touring visa at key leisure entry points such as Sani Top and Caledon's Poort.

b. Improve visitor facilities at border posts: conduct an assessment of immigration facilities and procedures at border posts and make improvements as required.

6.2.4 Foreign exchange services

Lesotho has a flexible tourism foreign exchange regime as the South African Rand is accepted as currency in the country. For

Promise Promoted
Advertising, Media Editorial, Online and Social Media, Travel Trade

Visitor buys
Advice, information, sales knowledge, ease of booking, price, etc.

Prepares for visit
Visa, Internet, information, etc.

Travels and arrives
Airport, airline, Immigration, airport, forex, transport, etc.

In-destination experience
Attractions, service levels, shopping, accommodation, food, friendliness, roads, transport, infrastructure, safety, environment, etc.

Visitor Returns
Airport, Taxes, CRM, regular communication, etc.

Fig. 15 – The visitor journey

foreign visitors arriving directly into Lesotho or transferring immediately from a South African port of entry to Lesotho, converting currency can be more challenging – whether on arrival or in Maseru or other large towns.

ACTIONS

a. Improve foreign exchange service at key entry points: Assess foreign exchange services at Maseru entry points and arrange improvements in foreign exchange services, ATM provision and/or information provided to visitors upon arrival, in association with financial institutions or currency exchange providers, especially of the universality of the Rand.

6.2.5 Tourist transport and shuttle services

Securing reliable transport providers in Lesotho can be difficult, mainly due to the limited number of tour operators and informal nature of the taxi industry. There is no regular transport service from Moshoeshoe Airport and visitors arriving by plane can be left stranded unless they have pre-arranged shuttle services from the airport. There is also currently no distinction among the various taxis operating around Lesotho regarding their standards of service, safety and suitability to transport visitors.

ACTIONS

a. Improve tourist shuttle and transport services: Agree with Lesotho tour operators a solution of providing a formal shuttle or tourist taxi service from the airport to Maseru city at times when flight are scheduled to arrive and a suitable information services to inform potential and arriving visitors of such services and costs.

b. Accredit tourist taxis: Engage with taxi owners and agree on a suitable system of accrediting specific taxi drivers and vehicles to transport tourists based on the quality of their vehicles and standards of service. To achieve this, provide training and some form of branding for accredited tourist taxis and communicate this to tourism providers and visitors. MTEC and the Department of Traffic should address this in joint policy - to prevent misleading promotion of taxis and other public vehicles as "tour operators/tours" on the public transport vehicles as this mislead self-guiding tourists.

6.2.6 Tour guiding services

With Lesotho's brand centring on experiential travel, high quality tour guiding and interpretation is of extreme importance for offering an attractive and high quality tourism experience. While LTDC has conducted various tour guide training course during the past few years, there exists a guiding and interpretation gap at local level when visitors arrive at specific sites or when South African-based tour operators enter Lesotho with clients who have bought a Lesotho extension from such operators.

ACTIONS

a. Conduct an assessment of tour guiding capacity: In accordance with the Areas Development Plan, conduct an assessment and evaluation of tour guiding services available at the various en route destinations, nodes and trails. The evaluations should not only focus on physical presence and availability of tour guide services but should also evaluate the communication abilities of tour guides to 'tell the story'.

b. Plan and implement a tour guide improvement programme: Based on such evaluation, develop and implement a prioritised local tour guide improvement and capacity building plan. Tour guide training, up-skilling and mentoring should preferably be conducted in association with experienced guides and tour operators (including those from the RSA willing to support and participate), for guides to get a practical grip on client and industry requirements and to be exposed to practices and standards of a high quality.

6.2.7 Rest areas and facilities

Lesotho's selling proposition is based on the country's beautiful and scenic landscapes and interesting cultural heritage. Visitors touring the country to enjoy such scenic and cultural heritage sites need to stop at regular intervals to break their journeys and enjoy the experiences on offer. Such breaks do not only make the trip more enjoyable but also provide opportunities for visitors to spend money on snacks, meals, souvenirs and other products. Currently there are few such equipped rest points and where they do exist (e.g. at Liphufong, Bokong and other attractions facilities) are often neglected and or poor standard.

Also in section 6.4.2 and 7.2 it is discussed the importance of roadside amenities along tourism routes for the safe and comfortable circulation of tourists across the country.

ACTIONS

a. MTEC will conduct an audit and suitability assessment of tourism rest areas and facilities: In accordance with the spatial development plan, conduct an assessment and evaluation of tourism rest facilities, (including secure and safe parking areas, view points, toilet facilities, shade, catering and/or picnic facilities) along the various routes and trails and at destinations and nodes. The "audit" should identify the most important gaps and priorities for provision of rest areas and facilities.

b. Implement a rest areas development and improvement plan. Audit and evaluate present roadside facilities. Based on this evaluation, devise and implement a prioritised tourism roadside rest area plan for Lesotho. Such plan should propose the prioritised improvement of rest areas and facilities, based on market requirements. Every effort should be made to engage in public-private-partnerships with filling stations, hospitality facilities and other providers for providing such facilities. Where physical improvements are required the plan should provide detailed specifications of such infrastructures, landscaping and other requirements. Routes and sites that have the highest visitor numbers and that are most ready to receive visitors should be prioritised for development.

6.2.8 Tourist safety, hygiene and medical facilities

First-time visitors to developing destination are especially cautious regarding personal safety, health and hygiene. The destination's reputation and brand image can also suffer major setbacks with safety, health or other incidents. It is of utmost importance to make every effort for preventing potential negative incidents and equally important to have in place facilities and measures for mitigating potential negative outfall when such incidents do occur.

Lesotho has low levels of visitor harassment and where these have occurred there is usually and reason related to visitor conduct towards local citizens or communities. Corruptive practices by police and immigration officials is more common and must be addressed by MTEC and relevant authorities.

A key issue for positioning Lesotho as an experiential, outdoor-oriented destination is the provision of adequate medical and emergency services of a high quality. Visitors should be able to receive emergency medical attention soon after any incident occurs and currently there exists no organised system of procedure in this regard.

ACTIONS

a. MTEC will develop a strong relationship with the Police to prevent any form of visitor harassment, bribery and tourism criminality: This is a longer term process that requires the support and participation of recognised "tourism champions" within communities along tourism routes and within the im-

migration and security services, to influence and monitor the nature and extent of incidents. A special "visitor welfare" program should be established with the objectives of a) working with local public, private and community stakeholders in inculcating a culture of visitor well-being and b) providing information, advice and support to visitors when any incident occurs.

b. Formalise tourism emergency services: MTEC will work with appropriate authorities to compile a contact directory of locations and services available for treating visitor illnesses or injuries and make these available to the tourism and hospitality trade in and outside Lesotho and on various online platforms, including the official website.

Similarly, MTEC will investigate and compile information on emergency services that could service Lesotho and ensure such services are formalised, by MoU between MTEC, the Military, flying doctors and other emergency services, for example, to react in event of tourism incidents. These arrangements are to be publicised and communicated to the travel trade in Lesotho, the RSA and through appropriate websites and social media marketing channels.

6.2.9 Customer service delivery

Providing visitors with true Basotho hospitality requires that customer service at every visitor touch point reflects a welcoming, helpful, efficient and effective interaction with visitors. Good customer service should prevail from the time of visitor arrival (i.e. moving through health checks, immigration and customs, taking a shuttle and checking in at the hotel), throughout the visit and until they have departed.

ACTIONS

a. MTEC and LTDC will collaborate to design and launch an integrated tourism customer service delivery programme: The Basotho culture is one of hospitality, friendliness and peacefulness and these traits should be embedded as important brand values. Good customer service demonstrates these values and conveying these to international tourists requires special skills in terms of customer interaction, communication, timeliness and other behaviours. Since many different public and private sector service providers interact with tourists a coordinated training programme would be launched by MTEC and LTDC, involving a team of tourism ambassadors from key delivery Ministries, community representatives from key sites/experiences and private sector representatives.

Fig. 16 – Manganeng River Valley

6.3 Improve and expand the product base

The concept of product development includes the development and/or enhancements of publicly, privately and community-owned and managed tourism resources, whether natural, cultural or man-made. Many of these resources have limited tourism value without being improved, packaged and managed in accordance with tourist needs. The following elements of product development in Lesotho require attention.

6.3.1 Tourism routes and trails

LTDC has identified five main circuits covering Lesotho. This is a good start for positioning Lesotho as a touring destination, however the identity and essence of each route is not clearly defined and limited information is available regarding travel distances and times, experiences on offer facilities and services available and infrastructural conditions such as road quality, fuel availability rest and toilet stops, along the routes. The current circuits are mostly aimed at and suitable for the general touring market and are not differentiated and to appeal to various market segments.

ACTIONS

a. MTEC and LTDC will devise a plan to implement the following sequence of Product Development initiatives:

- Conduct an audit of the network of prioritised circuits and tourism routes in the TMP (→ see map 4) to identify gaps and requirements relating to visitor access and amenities, design and landscaping of routes and trails, quality directional and interpretative signage, community engagement and benefits, environmental impacts, and other criteria.

- Draft short, practical, development, marketing and management plans for the various trails and circuits in close cooperation with local communities, tour operators and special interest associations/societies (e.g. 4×4, mountain biking and hiking) and encourage 'partner' operators to package them. Such development plans should contain specific actions to be executed, indication of persons or parties responsible for executing these, realistic budget estimates and targeted time frames.

b. Strong consideration will be given to follow the identified segments of opportunity and developing and implementing a focused, targeted, marketing strategy (→ see section 6.3.2).

c. Develop and promote the network as a core component of Lesotho's destination development and marketing strategy. It

will be essential to include local community organisations and leaders in owning, managing and benefiting from trails and routes.

6.3.2 Thematic experiences

Tourism in Lesotho has already developed to some extent along thematic lines, with adventure tourism (pony-trekking, mountain biking, off-road motorcycling, hiking, 4x4 adventures as examples) being the key product theme that characterises the Lesotho brand, supported by other themes such as ecotourism (bird watching, botany and archaeology), cultural tourism (Basotho mountain culture, San heritage) and religious tourism (mission stations and heritage, outreaches, and, historic sites). These and

other thematic and special interest tourism experiences should be further enhanced to appeal to a wide spectrum of market segments (see section 6.5). The following table presents some guidelines and recommendations for thematic product development along and at the various trails, routes and destinations.

ACTIONS

a. In collaboration with the MTEC, LTDC and the private sector, the following key, demand aligned, product development opportunities will be prioritised in the short to medium term and an implementation plan developed.
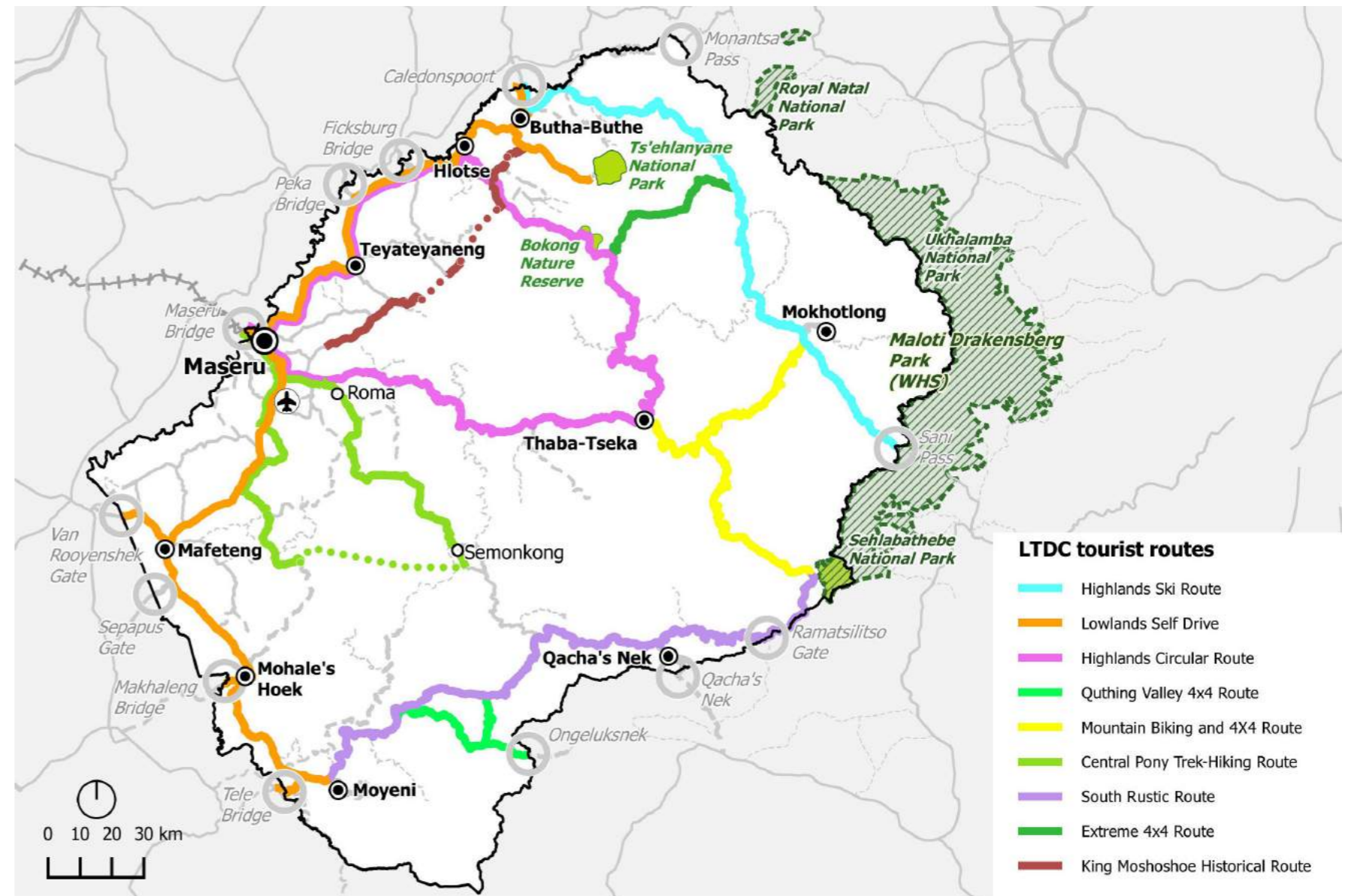
Fig. 17 – LTDC tourism routes

Table 20 – Key product development opportunities

Theme	Product Development Opportunity	Location		Notes
Adventure tourism	a) Further expand and enhance **high-quality, community-based mountain-biking and trekking trails**. Such trails should be professionally designed and laid out and while community co-ownership, maintenance and benefits are prerequisites for success, overall operation and promotion should ideally be commercially driven, in partnership with a private operator(s) and relevant government agencies. Trekking routes should preferably all be guided routes, with communities offering services such as food, suitable accommodation, etc.	Best mountain-biking locations: — Afriski resort — Lesotho Sky Mountain Biking race — LTDC Mountain biking & 4x4 route — Malealea to Roma, Metolong Loop, Malealea Loop — Maletsunyane Falls, Ketane Falls, Ribaneng Falls. Qiloane Falls, Qhooaneng. — Quthing district in general — Roma to Semonkong , Semonkong Loop — Sehlabathebe NP (Mountain resort)	Top trekking trails locations: — Afriski resort — Ha Liphapang — Malealea Lodge and waterfalls — Quthing district in general — Royal route — Sani Pass — Sehlabathebe NP — Semonkong Lodge and Maletsunyane Falls	— A significant portion of Lesotho is an ideal location for trekking and mountain biking Related LTDC initiatives: — LTDC/FS Letsa-la-Letsie Adventure Resort — LTDC/FS Sanitop Equestrian and Ski Resort — LTDC/FS Sehlabathebe Mountain Health & Wellness Resort — Lesotho Sky Mountain https://lesothosky.com/route-2018/ — They are already established and attracting a lot of local companies that can be helped to hold the same events in other districts. — Professional layout, marketing of trails of various difficulties and development of community based overnight facilities, community members as guides, cooks, etc. — Point to be made that trekking is different to hiking as it involves guides, porters, cultural exposure and local interaction
	b) Plot and grade of **off-road motorcycling and 4x4 trails** and adding these to GPS mapping software. As with hiking and biking trails communities should be intimately involved in maintenance, while a permitting system could be operated on a concession-basis with a suitable commercial operator.	Sani Pass and villages beyond Routes developed by LTDC: — Extreme 4x4 route (by Tlaeeng Pass) — Mountain biking and 4x4 route (from Selhabathebe to Sani Pass) — Quthing Valley 4x4 route		Many South-African tour operators propose different routes, e.g. the web site www.getaway.co.za has 8 different 4x4 routes with detailed explanations and maps.
	c) Expand, professionalise and improve quality of privately operated **pony trekking**. There is currently no guidance or control over the safety and quality of pony trekking and for Lesotho to be the most sought after pony trekking destination special guidelines and monitoring mechanisms should be instituted.	Best pony trekking locations — Basotho Pony trek centre (near Qiloane falls) — Bokong NR — Ha Lejone — Ha Liphapang — Katse Lodge — Malealea Lodge	— Mohale Dam — Molumong Lodge — Sani Top — Sehlabathebe NP — Semonkong Lodge — Tsehlanyane NP	Related LTDC initiatives: — LTDC Pony trekking and stable facility to be redeveloped, lodge on creek nearby — LTDC/FS Sanitop Equestrian and Ski Resort — LTDC/FS Sehlabathebe Mountain Health & Wellness Resort — LTDC/FS Semonkong Waterfalls Resort — LTDC/FS Katse Tourist Village & Golf Resort
	d) Develop water-based activities namely fishing/angling, canoeing and kayaking, with nature guides training, and related facilities at prime dam sites. A permit system could be operated by a suitable commercial operator. The concept coud be explored of a centre of excellence sailing stand-up paddling, canoeing, thriathlon and open water swimming, etc.	Areas earmarked as "Limited development areas" by the current LHDA zoning at: — Mohale Dam — Katse Dam	Small artificial lakes close to Maseru: — Maqalika Dam — Metolong Dam	Related LTDC initiatives: — LTDC/Katse Tourist Village & Golf Resort feasibility study
	f) Further expand **snow-ski facilities** and supportive infrastructure based on feasibility and demand assessments.	— Sani Top — Afriski		Related LTDC initiatives: — LTDC/FS Sanitop Equestrian and Ski Resort

Theme	Product Development Opportunity	Location	Notes
Ecotourism	a) Further develop Lesotho as a **prime bird-watching location**, especially for watching raptors (e.g. Lammergeyer, various vulture species, hawks, eagles, etc., see http://www.birdlist.org/lesotho.htm), including maintaining vulture feeding at accessible tourists spots, development of birding routes and hides to watch raptors hunting and breeding, etc.	Best bird watching locations: — Bokong NR — Letsa-la-Letsie and wetlands — Liqhobong — Mafika-Lisiu — Maliba Lodge — Northern Drakensberg — Sani Pass — Sehlabathebe NP — Sehonghong and Matebeng — Semonkong Lodge — Ts'ehlanyane NP — Upper Quthing Valley — Upper Senqu River	Related LTDC initiatives: — LTDC/FS Sanitop Equestrian and Ski Resort — LTDC/FS Sehlabathebe Mountain Health & Wellness Resort — LTDC/FS Semonkong Waterfalls Resort — LTDC/FS Katse Tourist Village & Golf Resort — LTDC/FS Letsa-la-Letsie Adventure Resort
	b) Improve facilities, interpretation and guiding at **key dinosaur footprint sites**. While these sites have seen some improvement the "soft" services such as customer interaction, interpretation, guiding and financial controls are sorely lacking and should be urgently improved.	Key dinosaur footprint sites — Morija — Quthing — Roma Village — Subeng Stream	
	c) Stock up **national parks with a larger variety of suitable wildlife**, especially Tse'hlanyane Nature Reserve and Sethlabathebe National Park. Offering game-viewing without the threat of dangerous wildlife and predators in these areas could provide attractive opportunities for on-foot game viewing.	— Tse'hlanyane Nature Reserve — Sethlabathebe National Park	— Use of endemic species recommended — Development of guided walking safaris without threat of predators
	d) Establish a 10 km cross-border ecotourism zone in the Maloti-Drakensberg Transfrontier Conservation and Development Area, on the Lesotho side of the uKhahlamba Drakensberg Park and the Maloti-Drakensberg Park WHS. Such zone should allow visitors participating in non-motorised ecotourism activities such as hiking, trekking, biking and adventure activities to cross over from the South African conservation areas into Lesotho without clearing immigration, under the condition that they are in possession of a valid permit issued by the South African conservation authorities.	— Sethlabathebe National Park — Drakensberg Mountains	— Lesotho communities living within or adjacent to the zone will have opportunities to interact with and provide services (guiding, meals, crafts, camping and accommodation, etc.) to such visitors
Scenic touring	a) Improve facilities and infrastructure along **scenic tour routes** in Lesotho to ensure easy, hassle-free and enjoyable tourism experience. Product development and expansion of this element is addressed in Section 7.2. above (visitor facilities), in infrastructure development proposals (Section 7.4), and in the spatial development concept (Section 8). b) Engage in an entrepreneurship development programme with local communities and entrepreneurs along the routes for improved **provision of suitable tourist rest stops, catering, souvenirs, accommodation, etc.**	— Central Highlands route — Escarpment Route — Highlands Dam route — Maloti-Drakensberg Highlands route — Senqu River Valley route — Waterfalls route	— This should include the development of selected, well-equipped viewpoints along the routes together with an orientation and information system — Roads built into the side of the hill or situated at the highest point of a plateau have sites which make good view points. — Routes should ensure minimum standards ($\rightarrow$ 7.4.2) — Refinement of dam wall and hydro-electric plant – these are quite unique especially for niche markets of engineering oriented people .
Culture and heritage	a) Identify, develop and promote three or four most unique, well-conserved and accessible **San rock-art sites**. This would include drafting site improvement plans, putting in place protective measures, enhancing interpretation and ensuring that ownership, guardianship and benefits of such sites accrue to local communities, with such communities taking part-responsibility for conserving the sites (see also CHECKLIST).	Three or four most unique, well-conserved and accessible San rock-art sites — Ha Baroana — Ha Liphapang (Tsatsane) — Liphofung NR — Qomoqomong (Quthing Valley) — Sehlabathebe NP	See also 7.7 (raccomandation 7.6)

Theme	Product Development Opportunity	Location	Notes
	b) Introduce a **"living-culture" tourism initiative**, including the development and **promotion of local music, dance, drama and other art forms** to present to tourists. This could include both traditional and modern art forms and suitable participants could be identified in close cooperation with NGOs, cultural associations, etc. The initiative should support the development of a repertoire of high quality performances and exhibitions that can be offered to local and foreign tourists. Specific venues could be earmarked and promoted specifically for tourism performances (e.g. Thaba Bosiu cultural village, Alliance Francaise centre in Maseru, Sani Top, etc.). This will require ensuring a consistent, guaranteed schedule of delivering such performances.	— Alliance Francaise centre in Maseru — Morija Museum and Archives — Sani Top (future developments) — Thaba Bosiu Cultural Village	— Many locations are suitable for performance but few will have a critical mass of visitors
	c) Improve on the Arts and Crafts products packages and Route. Outlets to include visitors' facilities and learning tours.	— Maseru, Berea, Leribe, Ha Lejone, Katse, Mohale	— LTDC is currently running awareness campaigns at some villages along the national routes to sensitize communities on how to improve their services.
	d) Improve the horse racing events and the related facilities and infrastructures.	— Semonkong, Peka, Mohale's Hoek, Mafeteng, Butha-Buthe	
	e) The Roof of Africa and Moshoeshoe Walk annual events should be encouraged to use more community based services.		— This should be promoted and catalogued as annual events.
Wellness and SPA	a) Scope and attract investment in a **high quality spa and wellness resort** in an environmentally pristine, high mountain location. The rationale for attracting such investment is that Lesotho's pure air, water. Hot water springs and unpolluted highlands offers the ideal location for healthy living and recovery after illness, surgery, etc. A pre-feasibility study should be conducted to identify potential locations that could be offered and promoted to investors.	— Sehlabathebe National Park	Related LTDC initiatives: — LTDC/Sehlabathebe Mountain Health & Wellness Resort feasibility study
Religious heritage tourism	a) Plot and actively promote **Lesotho's Missionary Routes**, with key missionary heritage sites and locations to visit in between. This initiative should be implemented in close cooperation with the various church missions in Lesotho and a close partnership should be formed between the various NGOs/missions.	— Makhoarane Valley — Morija — Butha-Buthe Plateau — Thaba-Bosiu — Mt Moroosi — Roma — Christ the King Mission — Tlo-u-Tle Valley — Santa Monica Mission Chapel	
Niche products	Niche products refer to attractions and facilities that appeal to small, special interest market niches, which will seek out unique locations and products for experiencing or practising their interests. The following niche-product possibilities could be explored in Lesotho: a) Explore facilities for **high-altitude athletics training**: Investigate, assess feasibility and promote in association with private investors.	Alternative locations: — Sehlabathebe National Park (better landscape, 2400 m) — Future Sani Top ski development (better accessibility, 2800-3000 m)	Related LTDC initiatives: — LTDC/Sehlabathebe Mountain Health & Wellness Resort feasibility study — LTDC/FS Sanitop Equestrian and Ski Resort
	b) Explore locations and opportunities for **hard-adventure sports**: Investigate, plot and promote in association with niche operators e.g. river kayaking, paragliding, rock climbing, etc.	— Afriski resort (paragliding) — Escarpment around Sani top and in the Maloti-Drakensberg Trans Frontier Conservation Area — Sani Top (adventure sports in general) — Sehlabathebe NP (rock climbing) — Watefalls: Maletsunyane, Qiloane, Semonkong (abseiling, paragliding, river rafting, etc,)	Related LTDC initiatives: — LTDC/Sehlabathebe Mountain Health & Wellness Resort feasibility study — LTDC/FS Sani top Equestrian and Ski Resort — LTDC/FS Semonkong Waterfalls Resort

6.3.3 Accommodation and tourism services

The development and expansion of accommodation and tourism services capacity is strongly linked to visitor demand for the destination. In essence, accommodation volumes, quality levels and prices usually respond to market demands, given a suitable and conducive investment climate. However, increased awareness of tourism as an opportunity for Small and Medium Enterprise (SME) development and accompanied government support and encouragement may prompt individuals and small entrepreneurs to invest hard earned capital in developing accommodation facilities without a proper assessment of demand.

The concept of "homestays" is an example of such encouragement programs, which have largely struggled to survive in locations such as Kome and Qachas Neck. Similarly the good intentions of government bodies to expand accommodation through public sector development and management have generally not been successful. Government owned and operated facilities at Bokong, Liphufong, Sethlabathebe bear proof of such failures. A market-based, commercial approach to accommodation and tourism services development should be introduced as a matter of urgency.

This has included the development of the 'homestay' product' whereby tourists lodge with local people, to become an important product that Lesotho offers.

Table 15 in the preceding Section 5 identifies projections of rooms required and potential job creation as a result of implementing appropriate recommendations in this Master Plan.

ACTIONS

Collaboratively with the LTDC, appropriate Ministries and other appropriate District authorities and relevant private sector, MTEC will:

a. Launch a suitable investment programme for ensuring viable operation of government tourism accommodation assets, which could be done through a PPP, full privatisation, concessions and leases, management contracts or any suitable and feasible commercialisation mechanism. Specific assets to consider include government-owned facilities such as those at Sethlabathebe NP, Tse'hlanyane and Bokong Nature Reserves, Liphufong Caves, Caledonspoort border post.

b. Conduct an assessment and draft mitigation plans for all government-supported "homestay" initiatives, determine success factors, gaps and obstacles and introduce measures to reduce risks and enhance the feasibility of those homestays that are deemed feasible and has potential to become viable businesses.

c. Expand and improve support programmes for Lesotho-based tour operators, by encouraging, facilitating and incentivising partnerships between Lesotho-based and South African operators, introducing legal mechanisms to prevent abuse of Lesotho's resources by foreign operators, providing marketing support and mentorship to Lesotho entrepreneurs.

d. Expand and improve support programmes for production of authentic, high quality Basotho handicrafts and souvenirs through identification of a suitable pool of gifted and dedicated producers, providing them with advice, training and possibly limited financial regarding design trends, quality improvements, product marketing and financial management, as examples. Benchmarking of international handicraft initiatives such as San craft development in Botswana and handicraft support in Morocco could be considered.

6.3.4 Product quality and standards

The majority of accommodation facilities at the mid to affordable level of the market (especially in lesser known tourism destinations) are independently owned and operated. Many such accommodation operators have not benefited from hospitality training and don't have experience in managing high-quality hospitality facilities. These entrepreneurs need to be empowered to improve the quality of facilities and service levels in areas like room facilities and designs, visitor hygiene, overall service levels, basic accounting, online marketing and especially catering and food preparation. The Quality Star grading and classification system provides the appropriate framework for quality assurance and its rapid implementation requires adequate resources and support.

ACTIONS

a. LTDC will fast-track the continuing roll out of the Quality Star grading and classification program. A special support mechanism may be launched to support establishments that are unable to meet the minimum entry level standards with suitable improvement.

6.3.5 Skills development

Ensuring adequate and appropriate human resources to provide high-quality tourism services and experiences remains an on-going challenge in a developing tourism destination like Lesotho. While LTDC has facilitated the delivery of various training programmes in aspects such as tourist guiding, food preparation and hygiene, these have been fairly ad hoc as LTDC does not have a dedicated tourism training function and allocates staff and financial resources to this function in an ad hoc fashion.

ACTIONS

a. Structure a dedicated tourism training capacity in LTDC. Tourism training requires a dedicated budget and would be a KPI of a suitable division in LTDC. This division to be responsible for formulating a suitable, three-year tourism training plan, to form the basis for securing an appropriate budget and forming appropriate partnerships with external training bodies.

b. Devise, implement and monitor a consistent and structured programme of practical hospitality and tourism training in partnership with relevant training providers. The programme to be aimed at owners, managers and employees of planned or existing tourism enterprises. Training areas to be considered for inclusion in the programme include Customer Care, Accommodation management and Housekeeping, Food Production and Preparation, Business Management and Front Office/Reception organisation. The design and execution of such programme will consider the practical circumstances of participants in terms of training time available, literacy and opportunities for practical exercises to practice acquired skills. Execution to be conducted in partnership with existing training facilities such as Lerotholi Polytechnic, Limkokwing University and other suitable international partners.

6.3.6 Events development

Given its outstanding natural environment and unique cultural traditions events tourism offers major opportunities for tourism development and should be pursued with vigour. While some events like the Moshoeshoe Walk and Morija Festival have been staged successfully events have not been supported within a strategic framework. A dedicated events development programme should focus on deriving benefits from major international events staged in South Africa (e.g. world cup sport competitions), on the development of local events of an international standard and on stimulating the development and enhancement of community-based events throughout the country.

a. Institutionalise the process of assessing the impact of current major events supported by LTDC in terms of return on investment, job creation and promotional benefits for Lesotho, for further incorporation in the Lesotho major events portfolio and earmark those events that have significant benefits for the country for inclusion in the major events portfolio.

b. Proactively identify and engage with potential events in South Africa and elsewhere, that could be harnessed and replicated in Lesotho, in particular events related to the product categories highlighted in Section 6.3.2 above and with an emphasis on outdoor sport and adventure events.

c. Based on the findings in 3.11 and 3.12 above, solicit and support a targeted and selected portfolio of event organisers to stage their events in Lesotho and provide suitable promotional, logistic and where appropriate seed funding support to selected events.

6.3.7 Community involvement and awareness

The role of local communities (see also section 6.7) and in particular livestock owners and herd boys in caring for tourism resources, hosting tourists and providing tourists services should not be underestimated. Tourists to Lesotho inevitably come into direct contact with locals and patronise natural and cultural attractions in communal areas, making it vitally important for community members to experience tourism as beneficial and to value tourists and tourism resources accordingly.

ACTIONS

a. Evaluate how tourism is conducted in three or four "pilot" communities that have regular engagement with tourists, their perceptions of tourism, the benefits derived, the social and cultural impacts of tourism, how benefits are spread in the community, and the major gaps and opportunities associated with tourism.

b. Evaluate the viability and creation of Tourism Development Trusts to ensure (a) coordination of community tourism activities and (b) fair participation and accrual of benefits to host communities. It is critical to ensure legalisation of tour operators contracting approved and licensed providers of community services to avoid exploitation of communities' and retention of local tourist and contracted expenditures.

c. Based on the findings, put in place a system of engaging community leaders and tour operators in addressing the gaps and

opportunities and agreeing on suitable guidelines and methods for sustainable community-based tourism management in Lesotho. These can then be adopted as policy and applied across the Kingdom.

d. Monitor the management processes and impacts of tourism in local communities in accordance with the guidelines adopted and address challenges and problem areas.

6.4 Provide the necessary infrastructure

Like any other economic sector, the viability of the tourism value chain depends on 'access' - and, mainly on infrastructure networks both at the national scale (e.g. roads, airports, border posts, telecommunication) as well as the local scale (e.g. access roads, electricity networks, water, sanitation, waste management). Without these it would be impossible to have a tourism sector. It must be bourne in mind that 'tourism' is a domestic activity and not always 'leisure', as well as international and, thus, signage is for Basotho, primarily.

It should be mentioned that, as of this writing in mid 2018, the process of the preparation of the National Transport Master Plan is underway. This should be seen as a precious opportunity to ensure synergy and ensure that requirements specific for tourism can contribute in reshaping the overall national transport system.

Fig. 18 – Road from Mount Moorosi to Letšeng-La-Letsie

6.4.1 Access gateways

The relevance of access gateways for tourism development is evident. They are the points of access to the country and they will largely contribute to give the first impression to the incoming visitors.

Lesotho is connected to South Africa's well-developed regional road network via a total of **15 border posts.** Maseru Bridge, with 521,647 arrivals in 2016, covers 43.60% of the total arrivals. Other important border posts are Ficksburg (366,770 arrivals in 2016) and Caledonspoort (138,246 arrivals in 2016). The border facilities at Caledonspoort have been recently improved. The three border posts mentioned host approximately 85% of the total arrivals. Facilities at minor border posts can have lower-level standards.

With 12,401 arrivals in 2015 and 13,652 arrivals in 2016, Moshoeshoe I International Airport is operating currently at a low utilization level with only three outbound and inbound flights a day operated by South African Airlink with 50-seater Embraer ERJ 45 equipment. According to the Department of Civil Aviation, there are plans under consideration to extend the runway and improve the terminal building.

ACTIONS

a. Conduct an assessment of border facilities and develop an upgrade project at the secondary border posts of Makhaleng Bridge, Ongeluksnek and Ramatsilitso Gate (see section 7.3) that are relevant for tourism.

6.4.2 Roads

It is expected that the majority of tourists will keep moving around the country, circulating in motorized vehicles, both self-driving or in organized tours. Hence the importance of ensuring a good level of service for the main road network. Also, given the relevance of investment required for new road infrastructure, the NTMP focuses exclusively on maintenance and upgrading the existing road network, so to maximize the economic benefits of former investment.

Lesotho's mountainous terrain, which covers around three-quarters of the country, poses a particular challenge to the expansion and maintenance of road infrastructure. In general, road condition is reasonably good and the volume of traffic is very low.

Even if most of the roads that tourist will use for inland circulation are tarred, there are weaknesses that must be addressed.

Along the roads, service stations are sometimes too far away from each other (even more than 200 km) to make the traveller feel perfectly safe. Also, stops at scenic view points are scarce. The few stops are not well laid-out and organized. Signage and interpretation is always missing. Furthermore, access roads to tourism sites are often in bad condition due to lack of maintenance.

According to the Department of Roads in the 5 years to 2023, no new roads are planned, but the focus will be on improving management and maintenance. Also, the WB-funded Lesotho Transport Infrastructure and Connectivity Project (LTIC) will provide technical advisory services for preparation of the National Transport Master Plan[7].

ACTIONS

a. MTEC will develop a robust system of engaging with the National Transport Master Plan team so to ensure they are sensitised to the tourism priorities for road access and that these are duly considered in the preparation of the plan. Tourists are key 'stakeholders' in road usage, represented by the MTEC. A concept that will be conveyed is that circulation of tourists does not always require tarred roads. There are circumstances where a good and well maintained gravel/marum road can better integrate in the environment and convey a pleasant "adventure" feel to tourists.

b. Roads earmarked as Tourism Routes (→ see Section 7.2) would be afforded a set of minimum standards to improve the visitors' experience and ensure safety and security of travellers.

Fig. 19 – Road from Mafeteng to Mohale's Hoek

6.4.3 Signage

The strategy of positioning Lesotho as an on-road and off-road experiential touring destination will target, among others, independent travellers who will use a variety of information sources to plan and conduct their travels.

In addition to online sources, guidebooks, printed maps and brochures, GPS technology and other methods, road and interpretive signage are vital components of the independent travel journey.

The assessment has pointed out that tourism signage is incomplete, at times misleading, at times cluttered, and at others non-existent. There are typing errors and no sign relates to the Lesotho brand. In general, signs are hard to identify and recognize, don't have a "family feeling" nor they do they transmit the brand identity. As recommended by UNWTO, tourism development plans should cover road signs to allow domestic and foreign visitors to receive information on the location of sites or attractions and/or how to reach them (UNWTO 2011).

Fig. 20 – Cluttered signage, Caledonspoort Border Post

Appropriate signage is an indispensable support to improve the tourist experience and safety of the visit to Lesotho. It will provide guidance for independent travellers, increase the sense of safety, inform visitors on their current route, distances and in general put them in the condition of easily moving across the destination. In the current practice of tourism development planning, we may distinguish two main types of signage.

– **Road tourism signage**, ideally a coherent system at the scale of a whole region or country, mostly conforming to international standards, focussed on the orientation and circulation of visitors towards their destinations. These are essential on main roads, at transport nodes, at tourism gateways and on tourism corridors in general.

– **Signage for site presentation and interpretation**, including signage for natural or cultural sites, city-cores, botanical parks and similar, circumscribed zones. These are essential to improve and add value to the visitor experience by providing orientation, guidance and information of the site being visited.

ACTIONS

a. MTEC will conduct an assessment of tourism road signage: In accordance with the spatial development framework (→ see section 7), conduct an assessment and evaluation of tourism road signage along the Tourism Routes routes and trails and at destinations and nodes. The audit will evaluate both the extent, quality and appropriateness of road signs against international best practice and identify the most important gaps and priorities for provision and/or improvement with a view to creating an appropriate signage improvement programme.

b. Following the assessment, a tourism road signage improvement plan to be implemented: Based on this road signs audit, devise and implement a prioritised tourism road signage plan for Lesotho. Such plan would follow international tourism signage ("brown signs") guidelines and will propose the prioritised phasing in of road signs, indicate public and private sector roles and responsibilities for providing and paying for road signs and procedures for road signs application and approval. Such signage will be, primarily, to improve domestic road users use of the network with tourists being downstream beneficiaries.

c. Conduct an assessment of tourism interpretive facilities: In accordance with the spatial development plan, MTEC will conduct an assessment and evaluation of tourism interpretive facilities along the various routes and trails and at destinations and nodes. The "audit" will evaluate the extent, quality and appropriateness of interpretive signs, information boards, information and interpretation centres, community interactions and other methods of interpreting environmental resources, landscapes, cultural phenomena and historical sites and events. Key gaps and required improvements will be identified,prioritised and included as a sub-set of the road signage programme as described below.

d. Implement a tourism interpretation improvement plan: Based on the evaluation, a prioritised tourism interpretation plan for Lesotho will be devised and implemented.. Such plan would propose the prioritised improvement of interpretive facilities, based on market demand. Routes and sites that have the highest visitor numbers and that are most ready to receive visitors will be prioritised for improvement.

6.4.4 Air transport

Apart from Moshoeshoe International airport, already discussed in section 6.2.2, air transport infrastructure also includes 24 regional aerodromes and airstrips, 12 of which are currently operational. According to the Department of Civil Aviation, the airstrips at Mokhotlong, Qacha's Nek, Semonkong and Paray (Thaba-Tseka) are in good order and ready to receive charters up to Cessna Caravan/STOL. They can be considered for charter flights for small groups of tourists as is the case across many other SADC counties where 'special' places are better and more conveniently accessed by air.

All the airports mentioned above are directly connected to one or more tourism routes as shown by map 5 and Table 21.

Table 21 – Secondary airports and tourism routes

Airport	Connected tourism routes
Mokhotlong	– Maloti-Drakensberg Highlands route – Escarpment Route
Qacha's Nek	– Senqu River Valley route
Semonkong	– Waterfalls route
Paray (Thaba-Tseka)	– Highlands Dam route – Escarpment Route – Central Highland route

ACTIONS

a. LTDC will work with charter operators and tour operators to explore the concept and viability of developing 'fly-in' safari style products and tour packages as is very common in the SADC region and has substantial market appeal.

6.4.5 Amenities

Road access, pedestrian circulation and good standards of facilities are key elements for the visitors' experience. Universal accessibility, including the elderly and people with disabilities, should be granted, at least at most important sites.

However, the assessment has shown that the quality of planning of tourism sites and design of facilities including accommodation is not good – sometimes could be defined as "amateurish". The

general organization of sites (access, parking, location of facilities) is not always logical; site resources such as landscapes of dramatic beauty and outdoor spaces seem to be not completely understood and their values not put at the basis of the planning/design process; services such as water tanks are often placed in an apparently casual manner and in plain sight.

Access to sites and facilities for people with disabilities is generally not ensured. Access to heritage sites is at times difficult and safety of visitors is not guaranteed by properly designed footpaths. Access signage and interpretation at sites is inconsistent and below reasonable standards in general.

Furthermore, Government owned and managed tourism properties show signs of a difficult maintenance and are at times in a state of increasing decay.

ACTIONS

a. To ensure a higher quality of planning and design, MTEC will develop and issue design guidelines and establish mechanisms to review and approve plans and designs for new tourism facilities before the construction permit is issued and put in place measures to upgrade existing facilities.

b. MTEC will accelerate the process of divesting the management of Government facilities to the private sector and ensure that the expected levels of service and quality standards of the facilities are clearly stated with appropriate benchmarks.

c. MTEC and LTDC will adopt and/or adapt the following checklist for the minimum requirements to be ensured by all tourism amenities, attractions and sites.

RECOMMENDED CHECK-LIST OF MINIMUM REQUIREMENTS FOR TOURISM AMENITIES

Access

☑ Signage at junction on main road network is easily identified, uses the international tourism road signage (brown signs) protocol and gives clear indication of the site and the distance.

☑ Access road to site (from main road network to actual site/attraction) is of sufficient standard for 2 x 4 cars (road type, surfacing, width, max slope, …)

☑ Sufficient parking is available, including parking for people with disabilities (covered/uncovered, sqm per car, …)

☑ Lighting of access area is well-conceived, consistent, even, not excessive and functional (if the site should be accessible at night)

☑ The site is accessible to people with disabilities (width of paths, slopes, steps, access to facilities)

☑ Adequate security and visitor access control are in place to protect the site from unlawful access

☑ Measures are in place for regular cleaning, integrity of presentation and maintenance

Facilities

☑ Visitors' toilets are available, including toilets for people with disabilities

☑ Coffee shop, cafeteria, local food, local produce (where feasible/appropriate)

☑ Curio shop, craft shop (where feasible/appropriate)

☑ Appropriate site interpretation (contents, language, attractiveness, …) – could range from interpretive signage to visitor's centre, info centre, or site museum

☑ Properly trained local guide services are available (where feasible/appropriate)

☑ Measures are in place for regular cleaning, integrity of presentation and maintenance

☑ Night-watchman's facilities

Site/attraction

☑ Assets are sufficiently protected against rainfall, solar radiation, involuntary damage, vandalism, and ther threats.

☑ Footpaths for movement within the site are clearly marked, easily accessible, safe (safety, railings, width, slopes, steps, anti-slip, no overhanging foliage on pathways, and other safety provisions)

☑ Clear indication of access conditions, costs and ticketing procedures

☑ Internal directional signage is in place and sufficient to ensure orientation for visitors.

☑ All visual materials (signage, interpretation, maps, brochures) are well designed and coherent with the Lesotho tourism brand

☑ Adequate and well-maintained waste disposal facilities (bins or similar) are placed at suitable points

☑ Lighting of internal circulation is well-conceived, not excessive and functional (if the site should be accessible at night)

☑ Lighting of findings, artefacts and exhibits is well conceived and functional (if needed)

☑ Urban furniture is available and does not disturb the sense of place (benches/dustbins/canopies and shelters)

☑ Outdoor spaces are properly landscaped (use of local species, use of permeable pavements, slip resistant floor and ground surfaces, storm-water management, easy maintenance, …)

☑ Site resources such as vistas, trees, slopes, fetures and landscapes are put in value in site lay-out

☑ Measures in place for regular cleaning, site integrity presentation and maintenance

Utilities

☑ Running, clean potable water is available (from the water system/from well-sources/other)

☑ Rain water harvesting is in place (if appropriate)

☑ Grey waters are recycled (if appropriate)

☑ Waste water is properly treated/discharged to… /the sewer system/… to avoid any form of pollution or contamination

☑ Where required, electricity is available (from the grid/generator/solar-wind power)

☑ Renewable energy sources such as solar, wind, biomass, and geothermal are used

☑ Solid waste is sorted and where possible recycled

☑ Solid waste is collected and discharged to …

☑ Utilities such as water tanks are properly screened/out of sight

6.5 Marketing and Branding of the Destination

The following section sets out the main marketing foundations that underpin the vision and objectives. These are:

− a differentiated market positioning and destination brand,

− high-yielding target source markets and segments, and

− products and experiences that match market needs.

6.5.1 Market positioning and branding

Lesotho is truly a 'real' tourism destination – the unique mountain environment and Basotho traditions can be experienced all around the country and especially in the rural, high-mountain areas. A unique lifestyle and traditions have been carved out in the high-altitude environment, where cattle herding on horseback, stone-hut architecture and wearing the Basotho blanket are widely-practised phenomena. Lesotho's largely untouched natural and cultural heritage is evident in the lifestyle, landscapes, nature and history and this lends Lesotho a unique tourism character. The Basotho are exceptionally warm and hospitable and small population and geographical size of the country exudes a "family" feel, where people freely interact with each other and visitors.

Lesotho is truly Africa's "high-mountain kingdom", offering a multitude of exceptional experiences that appeal to a range of visitor segments. The positioning elements range from low-activity sightseeing to highly active and adventurous engagement that both individually and collectively offer a compelling selling proposition.

Some key implications of this positioning for the marketing strategy are:

− **Promote Unique Selling Points**: Lesotho has a lot more to offer than what is generally recognised among tourists and the travel trade. Each of the following 10 selling points is unique in the context of Lesotho being "Africa's High Mountain Kingdom" and deserves a special focus in promoting and developing the destination. The marketing strategy, collateral and content should be built on these unique selling propositions:

1. Unique Basotho culture and lifestyle (horsemanship, blanket, hat, architecture, herdsmen)

2. The Monarchy and royalty (history of King Moshoeshoe, contemporary royal family, traditions, practices and palace complex)

3. Spectacular landscapes and scenery (vistas, waterfalls, mountain passes, river valleys, landforms)

4. Thrilling adventure experiences (4x4, motorcycling, mountain biking, trekking, abseiling, trail running)

5. History and antiquity (dinosaurs, San paintings, cannibals, Chief Moorosi, colonisation)

6. Purity of environment (mountain air, water, silence and slow pace)

7. Engineering feats (Katse and Mohale dam walls, Muela Power Station, new dams being planned)

8. Unique ecosystems, vegetation and birdlife (Afro-Montagne vegetation, vultures and other raptors, wetlands and river systems)

9. Mountain fun and enjoyment (Skiing, contemporary music and arts, events, horse races)

10. Variety activities (hiking, boating, pony trekking, skiing)

− **Create a suitable environment for experiential travel:** Lesotho is primarily a travel destination for experiencing and activity, rather than a holiday destination for relaxation. This has implications across the entire tourism value chain including visitor facilities, safety and infrastructure, opportunities for interacting with nature and culture, conserving natural

Fig. 21 − Lesotho's Differentiated Market Positioning

and cultural resources, community involvement and participation.

– **Target the experience seeker:** Lesotho appeals to those who want more out of a trip than looking, sitting and eating; who prefer to see, touch, and taste and engage with the environment, people and traditions. A focused marketing strategy that targets such travel segments based on excellent market knowledge and intelligence is an important requirement for achieving rapid and sustainable tourism growth.

– **Develop and package experiences and not only attractions:** The variety of attractions in Lesotho is spread across the country and accessibility, availability and quality of visitor services vary considerably among attractions and destinations. Appropriate product packaging and improvement are of critical importance. Presenting such attractions to visitors as experiential opportunities, (i.e. dynamic opportunities for engaging with nature and culture) requires a dynamic public-private partnership, with private investors developing commercial facilities and services, private tour operators linking experiences and attractions as itineraries that can be sold to visitors, technology being used as tools for exciting and guiding visitors and public tourism bodies promoting travel destinations and routes, providing public visitor services and improving sites.

The following diagram summarises the brand promise and brand essence of Lesotho. It should be read in conjunction with the Lesotho brand strategy, which set out the brand identity comprehensively.

The brand promise can be summarised as follows:

Lesotho invites you to explore Africa's only Mountain Kingdom, where the Basotho nation has proudly carved out a unique lifestyle and traditions in Southern Africa's highest mountains and where spectacular vistas, thrilling outdoor adventures, modern engineering feats and age-old cultural practices merge to present the visitor with a multitude of surprising experiences.

Whether you abseil the highest waterfall in Southern Africa, traverse the Maluti Mountains on horseback, follow the trails of dinosaurs and missionaries, don a traditional Basotho blanket or simply stand in awe of the magnificent vistas and mountain passes, Lesotho will rekindle your spirit of adventure, discovery and freedom.

The new brand identity (logo) takes a big step forward in laying the basis for promoting Lesotho as a modern, upbeat environ-
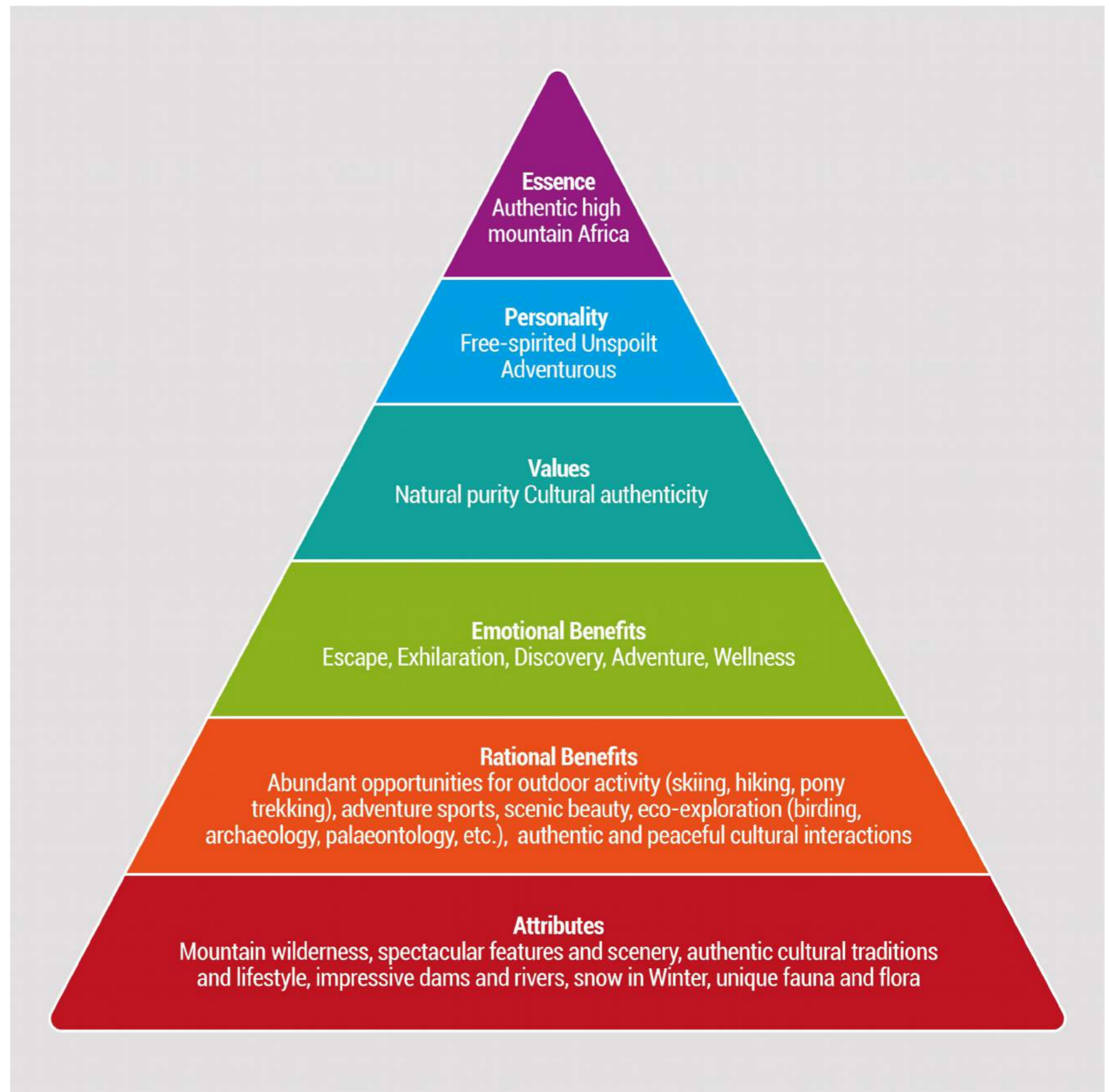
Fig. 22 – Lesotho's brand elements and essence

mental tourism destination rooted in unique and strong cultural traditions.

The Lesotho tourism logo and associated imagery has a fresh, modern feel that still reflects Lesotho's cultural identity and builds on the slogan of "Kingdom in the Sky", offering visitors an authentic, high-mountain experience in Africa.

The logo also allows for various thematic colour treatments related to skiing, adventure and culture, as follows.

Fig. 23 – The new brand logo

6.5.2 High-yielding target source markets and segments

The following sets out the target market strategy in terms of both source markets and market segments. The section should be read in conjunction with the market analysis presented in the diagnostic report.

SOURCE MARKETS

Potential source markets were analysed in terms of both their tourism value potential and the relative ease of attracting travellers and converting such potential to Lesotho on the other. Results are as presented in Fig. 24.

The marketing approaches are presented in Table 22.
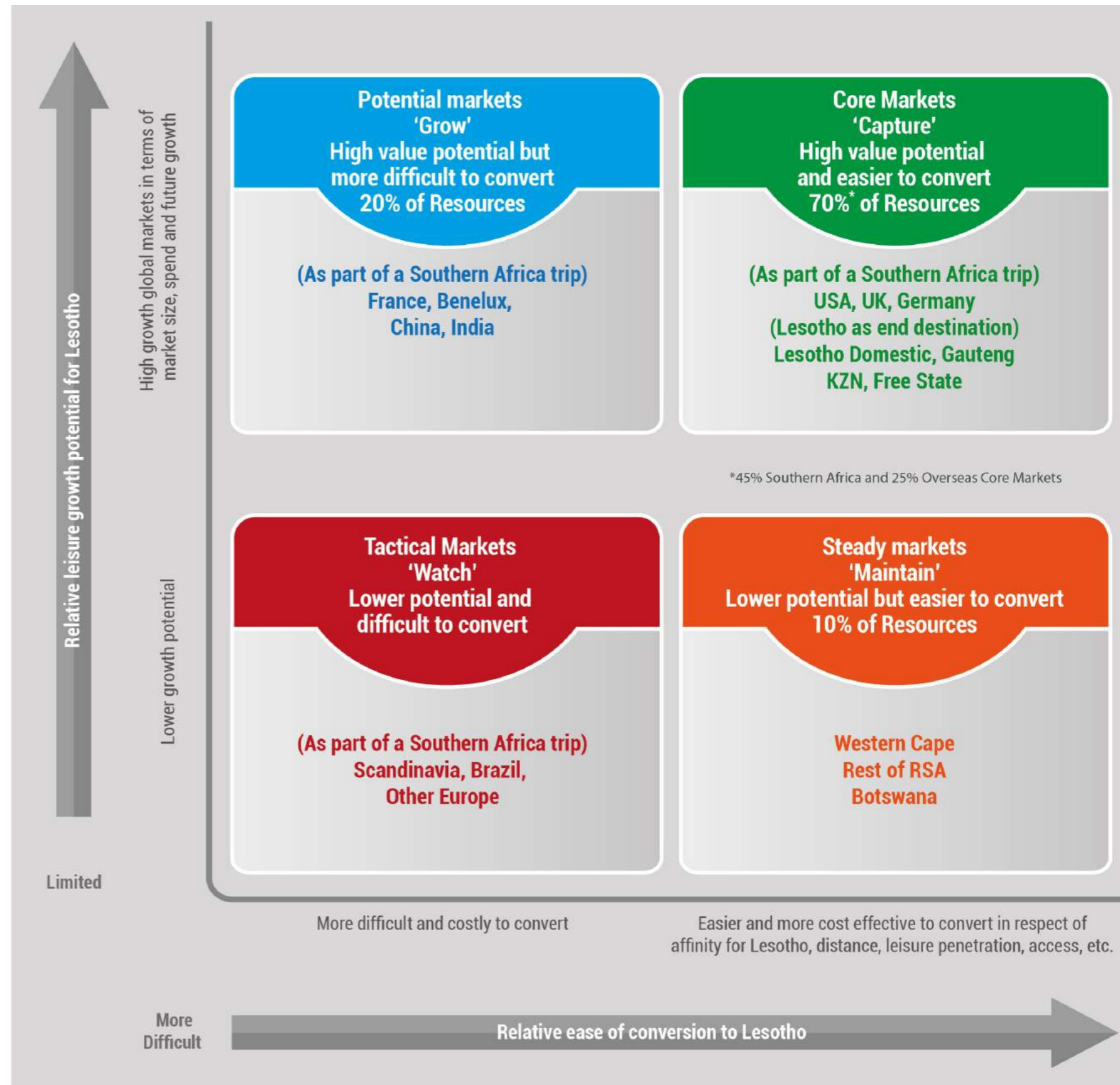
Fig. 24 – Target Source Markets and Approaches

Table 22 – Marketing approaches

Priorities	Countries	Strategy	Promotion approach

Core markets
 	
High value potential, an affinity for travel to Lesotho for leisure purposes and are easier and less costly to penetrate
	– Travellers from the following countries who visit Lesotho as part of a Southern Africa itinerary:
	  – USA
	  – UK
	  – Germany
	– Lesotho domestic (LSM 9-10)
	– Travellers from the following provinces in South Africa who travel specifically to Lesotho:
	  – Gauteng
	  – KZN
	  – Free State
		Capture
		
		Focus most promotional activities here in the short and medium term
		
		Apply 70% of marketing resources
			Apply the full promotion mix including:
			– A major PR and media drive, especially in South African media
			– Focus on digital advertising and social media focus with matching language content
			– Marketing agreements with South African based inbound operators that service these overseas markets, as well as with key operators and agents in these markets
			– Attendance of suitable travel trade and consumer fairs
			– Major trade education and joint promotions drive with South African inbound and foreign operators
			– Selective consumer advertising in South Africa as part of an integrated promotion campaign
			LTDC to establishing in-market representation in South Africa

Potential growth markets
 	
High value potential, limited incidence of leisure travel to Lesotho and more difficult and costly to penetrate
	– Travellers from the following countries who visit Lesotho as part of a Southern Africa itinerary:
	– China (focus on '2nd wave' experiential travellers)
	  – India
	  – France
	  – Benelux
		Invest for growth
		
		Focus some promotional activities here in the medium term towards growing these into the core market portfolio in the longer term
		
		Apply 20% of marketing resources
			Selective activities e.g.:
			– Selective travel trade and media education and familiarisation program
			– Selective travel trade joint promotions with suitable South African inbound operators that specialise in these markets
			LTDC to engage in promotional activities with Lesotho Diplomatic missions

Steady markets Limited value potential, an affinity for leisure travel to Lesotho and are easier and less costly to penetrate	– Travellers from the following provinces in South Africa who travel specifically to Lesotho: – Western Cape – Rest of RSA – Botswana	**Maintain** Focus limited promotional activities here with a focus on media editorial in special interest media and digital marketing Apply 10% of marketing resources	Mainly information provision and education, including: – Leveraging suitable online channels and content to make it easy for travellers to access information online – Providing Africa-focused and special interest travel trade with product updates and information
Opportunity markets Lower value potential, low incidence of leisure travel; more difficult to penetrate	– Scandinavia – Brazil – Other European countries e.g. Italy, Spain	**Watch** Leverage ad-hoc marketing opportunities Use spare resources only to support partners	Marketing activities will depend on the nature and extent of opportunities that emerge

TARGET MARKET SEGMENTS AND OPPORTUNITIES

Various market segments are evaluated based on their indicative scope for growth (in terms of value, volume and ability to increase the economic benefits of tourism activity around the country) and Lesotho's readiness for such growth in terms of access to experiences, tourism facilities for these segments and cost of reaching them. Priorities are presented in the Table 23 and in the Fig. 25.

Table 23 – Target market segments and opportunities

| Market segment	Marketing opportunities
"Capture Immediately" segments (high marketing investment)	
Intrepid explorer: Confident 'adventurous' exploration on a flexible, largely independent itinerary and in search of extraordinary experiences - prepared to sacrifice comforts to go to less visited places experiences, high value placed on cultural and natural authenticity and interaction 25	Engage and educate South Africa travel trade and selected outbound operators in Core markets to add Lesotho to their Southern Africa itineraries
	Major focus on online, digital communication and leveraging social media and influencers to communicate exceptional 'stories', sites and experiences
	Engage and support information in independent travel guides (Lonely Planet, Bradt Guide, Rough Guide)
Domestic and regional breaks: Affluent Basotho and South Africans taking weekend and short breaks to spend quality time relaxing, skiing, attending entertaining and events	Work with private operators to develop and promote special price packages, packaged and sold online and by private travel agents, tour operators and suppliers
	Use full promotional mix including TV, print, consumer exhibitions and online media
Adventure sport enthusiasts: A collective segment of specialised niche adventurous outdoor sport enthusiasts, e.g. mountain biking, motorcycling, 4x4 over landing, climbing/abseiling, kayaking, cross-country and endurance running	Major focus on online, digital communication and leveraging social media; communicate exceptional sites for various activities
	Engage with associations and clubs
"Invest & Expand" segments (medium marketing investment)	
Mature explorer: Confident 'soft' exploration on an independent or tailor-made itinerary, want to delve deeper and veer off the traditional Southern Africa holiday circuit based on personal preference, preferably with some local interaction	Engage South Africa travel trade to add Lesotho to their Southern Africa services
	Engage selected outbound operators in Core markets to add Lesotho to their Southern Africa offers
	Educate and promote consumers via leisure media
	Targeted online media promotion
Trekkers and hikers: Always in search of new mountainous and other exotic landscapes to hike, like Maluti Mountains Trekkers: Guided hikes on unmarked trails with baggage portaging and local hospitality Hikers: Self organised groups on marked and unmarked trails	Focus on education and promotion to specialist trekking and hiking operators
	Focused online media exposure to hiking community
	Exposure in outdoor publications and online hiking platforms
MICE: Meet and discuss with colleagues issues of mutual concern, in a professional and interesting environment with opportunities for local, high quality experiences. Mainly Maseru and focused in Meetings and Conference segments	Engage intergovernmental bodies, corporations with an interest in Lesotho, associations and conference organisers to create awareness of MICE
"Leverage Value" segments (Limited marketing investment)	
Birders: Focused travel to see endemic species (and other bird species) and adding them to personal birding lists	Communication via birding operators and exposure on online birding sites and social media platforms
Other niche segments: Various small segments of specialists visiting Lesotho for its unique features in particular areas like antiquities, religion and pilgrimage, archaeology, palaeontology, geology, **anthropology, art**	Online information provision and marketing to clubs and associations
	Empower and educate local guides to support special interest practitioners and visitors with advice
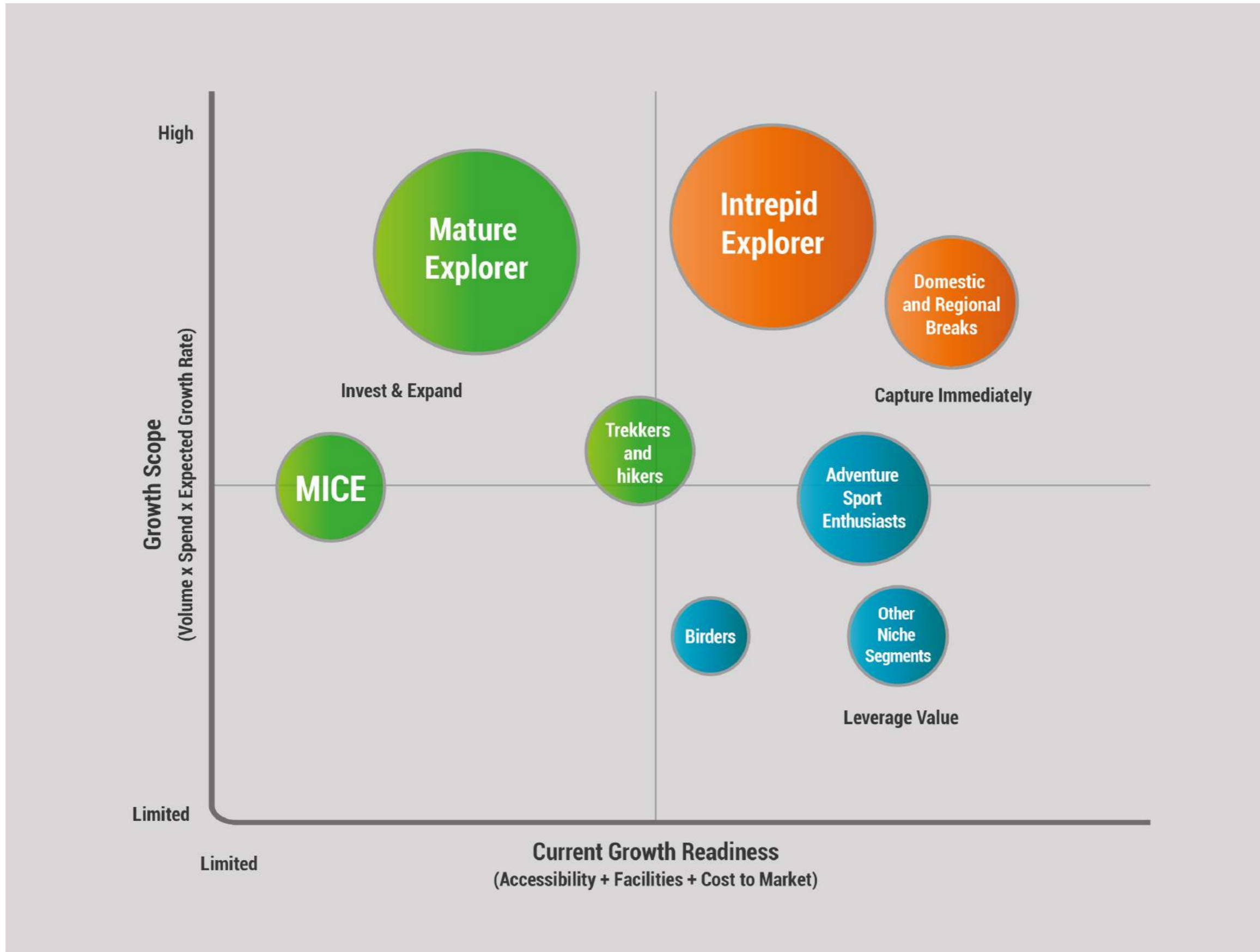
Fig. 25 – Target market segment approaches

PRODUCTS AND EXPERIENCES THAT MATCH MARKET NEEDS

Table 24 indicates the appeal of experiences and attractions for the various target market segments. Overall, the following patterns are evident:

From a target market perspective the following product approaches are recommended.

Table 24 – Recommended product approaches

Market segments	Product approach
Mature Explorers	Focus on visitor convenience, management and interpretation at key historical sites on the traditional circuit — Ensure visitor safety e.g. walkways, viewing platforms, safety railings — Promote investment in tourist class hotels, guest houses and other facilities — Improve visitor facilities at key sites (toilets, curio and snack shops, shaded seating) — Improve visitor management e.g. information, ticketing, capacity management and impact monitoring — Major focus on improved interpretation and guiding
Domestic and Regional Breaks	Focus on entertainment, relaxation and socialisation — Promote investment in domestic resort areas, including ski and water sport resorts — Develop a calendar of events, stimulating the development of sport and entertainment events (music festivals, running, cycling, food festivals) — Develop picnic and camping areas
Intrepid Explorers	In addition to facilities for Mature Explorers, focus on packaging extraordinary environmental and cultural experiences and circuits — Major drive to support and improve the extent and quality of community-based tourism — Develop and package experiences and trails beyond the known areas — Critical to retain authenticity of experience
Trekkers and hikers	Focus on packaging hiking and trekking experiences and improved community hospitality — Diversify trekking routes and improve trekking lodges, guide services, local community hospitality — Set up efficient reservation, permitting and payments systems
Special interest markets: Birders, Adventure Sport Enthusiasts and niche segments	Focus on packaging special interest experiences and improved community hospitality — Develop bird hides and promote community bird guiding — Develop and support adventure sport events (rafting, mountain biking, 4x4 rallies, long-distance running) — Develop and protect unique sites, landscapes and ecosystems that are of special interest — Identify and package adventure activities including guide training, safety measures and related guidelines
MICE (Meetings, Incentives, Conventions and Exhibitions)	Focus on building capacity for hosting and expanding the MICE industry Improve, maintain and encourage investment in international standards international convention centre facilities, especially the national convention centre as well as private conference facilities in hotels Establish a dedicated MICE desk within LTDC Create initial MICE marketing collateral in the form of an online directory of meeting venues in a MICE drop down menu on the LTDC website Invest in capacity building and training to ensure professional services, advice and support

6.5.3 Proposed marketing strategies and actions

OVERALL APPROACH AND RESOURCE ALLOCATION

- Given the immediate market segment potential and reachability of markets and as indicated above, the focus will be on the following marketing elements for the first three years of implementation.
- focusing the bulk of resources (at least 70%) where the immediate return on investment will be best, namely;
- south african leisure tourism consumers, primarily located in Gauteng, KZN and Free State;
- visitors from USA, Germany and the UK who have already decided or are contemplating to travel to Southern Africa, to convince them to include Lesotho in their itineraries. This will, primarily, mean working closely with inbound operators, DMCs, in South Africa;
- the Lesotho domestic market, especially higher income consumers;
- LTDC will work closely with private sector bodies in the region, such as SATSA (Southern Africa Tourism Services Association) in a drive to expose regional inbound tour operators to the country and its assets and to expand the coverage of Lesotho in the programmes they offer to their international partners;
- activities in the international market, such as attendance of trade shows and joint marketing agreements (JMAs) should be carefully evaluated based on the return on investment of each individual activity and the programme should be adapted accordingly;
- in addition, the promotional budget allocation by the Treasury will be significantly increased as the marketing allocation is inadequate for achieving a significant impact in the market.

The following marketing strategies and actions are recommended in support of the strategic objectives, the positioning strategy and the target market strategy outlined above.

PROMOTING LESOTHO'S TOURISM BRAND PROPOSITION

As indicated above the Lesotho brand promise and visual identity has been refreshed and the logo and slogan (Kingdom in the Sky) provide a good basis for crafting and promoting attractive brand messages.

ACTIONS

a. LTDC & MTEC will agree key brand messages and use these consistently when promoting Lesotho through public relations, advertising, online and social media. Once messages have been agreed all stakeholders will be encouraged to use these in text copy, media releases, advertising.

Table 25 – Key brand messages

Message examples	Image examples
Royalty wears a blanket	The King with audience wearing special Basotho blankets
Dynasties, dinosaurs and other discoveries	Dinosaur footprints; San paintings, Cave houses
Where eagles dare	Motorcycle coming up Sani Pass; abseil Maletsunyane Falls
Say: Moshoeshoe [mosh-esh-we]	Thaba Bosiu village; Thaba Bosiu mountain; Moshoeshoe walk
From a Maluti viewpoint	Views from Mafika Lisiu Pass viewpoint; Horseman on edge of waterfall; Bokong views with Bearded Vulture flying
Inside the wall	Katse Dam wall with people waiting to enter
Horses for courses	Pony-trekking adventure

As with other brands Lesotho's brand reputation and image could be impacted negatively from time to time, through health, natural or man-made disasters outside of the control of the tourism authorities. The tourism authorities should prepare for such events and respond effectively so as to avoid as far as possible undeserved damage to the image of Lesotho. The following steps will be taken:

b. Form a tourism reputation management work group to develop a 'Crisis Communication Plan'.: The workgroup will be chaired by the Tourism Department and will comprise the police services, disaster management services and other relevant parties. The workgroup will be responsible for formulating a crisis communication plan and to act as a communication mechanism for the tourism sector in event of disasters and other events that may affect the brand reputation of Lesotho.

It will be important for LTDC to gain the support of other public and private institutions that could assist in promoting the brand. Obtaining the commitment of other institutions and Ministries to promote the tourism brand will be critical in this process.

c. Form a marketing partnership forum: the forum will be established and chaired by LTDC to strengthen existing cooperation and partnerships and as a basis for joint branding and promotion of the country. In addition to all departments of MTEC, partners in the forum would include, among others,the Ministries of Foreign Affairs, Trade and Industry, Home Affairs (Immigration), Lesotho National Development Corporation (LNDC), private sector groupings and others.

CALL-TO-ACTION PROMOTIONAL STRATEGY

An anchor campaign theme will be developed for promoting Lesotho in print, electronic and digital media over a number of years. The campaign theme should include a strong call-to-action, e.g. "Go Lesotho" or " Visit the Kingdom" or another suitable campaign theme that supports the brand. This call-to-action should be used widely when promoting product themes, destinations and routes on websites, newsletters, social media, printed materials. Where appropriate advertising should be complemented by message by-lines that should focus on special offers, value-for-money/affordability and should drive consumer towards a website link of other booking channel.

ACTIONS

a. LTDC to devise and launch a call-to-action, multi-year promotional campaign, including:

- Devising campaign theme, imagery and collateral (including e.g. campaign presence on website, campaign-branded exhibition stands, print adverts, radio advertisements and podcasts, digital adverts for Facebook, email and other online media, short video clips, give-aways, window displays.

- Engaging trade partners such as airlines and local product owners in supporting the campaign and launching special campaign offers.

- Coordinating all LTDC marketing activities in support of a campaign roll-out plan.

- Negotiating joint marketing initiatives and special campaign offers, for promoting during travel shows, on the website, through domestic tour operator partners.

- Formalising distribution and reservation channels, including booking links on individual product websites, negotiating joint marketing agreements with regional and international

national tour operators, negotiating joint marketing partnerships with OTAs like booking.com, safarinow.com and others.

- Engaging national tour operator/travel agencies that specialise in the domestic market to offer weekend break and event attendance packages.

- Conducting online and social media advertising, radio and print advertising, joint advertising with selected national tour operator partners, a consumer promotions drive in Lesotho and Gauteng, Free State, and KZN, and engaging in a PR and media drive to maximise editorial coverage.

ONLINE MARKETING TOOLS AND PROMOTION

Digital marketing provides the most effective opportunity to reach consumers directly in its key markets. The tourism department should strengthen its online marketing capacity and will undertake the following actions.

ACTIONS

a. LTDC to design and launch special digital marketing campaigns in support of the call-to action promotion campaign, aimed at creating awareness about Lesotho and leading to direct bookings. The services of an online strategy partner will be secured for assisting in planning and executing the campaign. Actions may include:

- creating, using and promoting hash tags e.g. #Kingdominthesky, #GoLesotho;

- launching special campaign page on the landing page of the official website;

- promoting special online travel packages with OTAs and online fulfilment partners such as Booking.com, Expedia, Safarinow and others;

- conducting search engine (e.g. Google Adwords) and social media (e.g. Facebook) advertising with campaign call to action;

- enlisting travel bloggers to experience and blog about relevant product segments; and

- engaging Lesotho celebrities, Lesotho expats abroad and other influencers to use #Kingdominthesky, #GoLesotho and share with their networks.

b. Further improve the official website: The existing website www.lesotho.travel is very well designed, well-structured and generally well-populated with content. It is a rich source of tourism information and is a most valuable basis for building online marketing strategy. The following elements will be targeted for improvement in support of the campaign concept:

- Improved search functionality: The current search functionality is only available on the accommodation page and is relatively complex; especially the geographical search that uses regions and districts, rather than key tourism nodes and towns as a basis. In addition to using the hash tag keywords to combine accommodation search with activities, it would be advisable to link the accommodation search to the digital map of attractions and activities, which should allow visitors to see all activities and attractions in proximity to the accommodation facilities and visa versa.

- Improved digital mapping: The "Service Box" mapping module on the website is an excellent addition and tool and with a few small amendments it could be even more powerful in helping convert enquiries to actual transactions. Most importantly, mapping the various travel routes on the interactive digital map will provide an excellent tool for trip planning on the range of routes listed on the website. Other aspects to consider include providing links from the map listings to the website accommodation directory and not only to company websites as is the current practice, especially for companies without their own individual websites. In addition the "Interactive Map of Attractions", which is currently listed under the "Travel Guide" menu and not under the "Attractions" menu, could be linked back to various attractions listed under the "What to See>>Tourist Attractions" and "What to Do>>Adventure and Action" pages.

- Improved content: Few of the attractions and activities promoted on the website provide contact details for operators that are able to operate, organise or guide activities such as pony trekking, hiking, fly fishing. The product directory should ideally include pricing, business hours for key attractions to allow visitors to plan and obtain more information regarding their visits. Adding such information and linking the interactive maps to the text content may facilitate easier booking and greater conversion.

- Expanded events calendar: The events page lists the major annual events. While these are the most important events, various other smaller cultural, music and sport events take place on a regular basis and could attract the interest of domestic and foreign visitors. A regularly updated event calendar should be added, in addition to the page with major events.

c. Populate, maintain and promote a range of social media accounts and content (especially short video clips and stimulating imagery) for personal sharing and interaction in Lesotho's key source markets. This will be done by posting enticing content in support of the call-to-action campaign and using other promotional channels to connect potential consumers with the official Facebook page. LTDC will investigate establishing a dedicated YouTube account for video clips and using Twitter to more effectively raise awareness of campaign offers and events.

d. Enlist the services of travel bloggers (social media influencers): Various of Lesotho's target market segments including domestic travellers, Intrepid Explorers and niche segments are known to be highly active on social travel media and may of these travellers follow travel bloggers and influencers. Identifying and securing the services of the most active and sought after bloggers and influencers will be an important component of the digital media strategy.

e. Develop an extensive trade and consumer database (dBase) with whom to communicate on a regular basis. The dBase will be designed to gather client information, grow the travel trade and consumer database and target online promotions most effectively. In addition to collecting and entering travel trade information, compiling a consumer database will be investigated so communication can develop to visitors and develop a rapport thus enhancing referral word-of-mouth. This may be by inviting visitors to sign up for the LTDC newsletter when visiting key attractions and tourist information points.

f. Design, develop and conduct effective email marketing as an integral component of a marketing communications Plan: It is essential that LTDC optimise its email marketing messages to 'stand out from the crowd' and success factors include beautiful design, a segmented database and effective social media platforms, prominent social sharing buttons, incentivised promotions to encourage newsletter sign-up, opening of newsletters to target optimal timing, integrate email campaigns within overall marketing strategy. Measurability of responses is critical.

TRAVEL TRADE MARKETING

The promotional campaign will draw heavily of travel trade relations and a travel trade promotion and sales drive will be undertaken in both domestic and international target markets including the following actions.

ACTIONS

a. Research to validate a Trade Fairs strategy: The increasing status and power of the World Wide Web and other communication technologies such as VoIP, email, cellular telephones, video conferencing and so forth has in recent years largely reduced the value of trade show attendance. In the case of Lesotho, which largely serves as a component of a Southern Africa itinerary, the value of spending a substantial part of the marketing budget on attending international trade fairs, at the expense of regional marketing is questionable. A focused trade fair strategy is vital to create an effective balance of expenditures in the budget and will be based on the target market strategy presented above and the following travel trade fairs will be considered during the period of the marketing strategy:

- Indaba – Durban;
- WTM Africa, WTM (London) or ITB (Berlin).

b. Develop and adopt decision making guidelines for trade fairs attendance. The following guidelines may be considered.

- Adequate background research to establish the nature, quality and potential of trade and consumers attending exhibitions and where possible the aim should be to establish new marketing partnerships.
- Adequate preparation to precede attendance of fairs. Preparation meetings to be held with Lesotho exhibitors to ascertain how best the specific fairs can be leveraged and how the department can make most of its investment.
- Clear, measurable goals (e.g. business procured for Lesotho, travel trade agreements concluded, media exposure achieved) to be set for each exhibition and the results should be measured accordingly.

c. Ensure regular communication with the travel trade: Customer relationship management (CRM) possibilities can be optimally leveraged and adequate details and profiles of Southern African and international travel trade partners will be obtained and logged on a database, with proactive communication and feedback to the international and local travel trade on a regular basis.

d. Invest in suitable Joint Marketing Agreements in core markets: Joint marketing will be actively pursued with tour operator partners in targeted source markets to promote the country and the marketing campaign. LTDC's investment in trade partnerships will entail the most effective tactical activities e.g. online marketing drive, advertising, direct mail and email, distribution of flyers of special offers. Paid advertising will be discouraged. Similarly, suitable promotion agreements will be investigated with online travel agencies (OTAs) to enhance digital communications strategy and support tour operator partners.

e. Build a partnership of selected and willing trade partners: Identify and build awareness and knowledge of suitable inbound (Lesotho and South African) tour and accommodation operators, that are in the best position to on-sell travel experiences to their international partners. Inbound operators that specialise in arranging tours to Lesotho will be supplied with campaign marketing collateral. Travel trade and journalists familiarisation and educational visits will be integral to the partnership marketing strategy.

f. Attend sales missions and workshops in target markets on a selective basis: In exceptional cases, LTDC will consider participating in international workshops and road shows in the core markets as part of the trade partnership above.

MEDIA EXPOSURE AND PUBLIC RELATIONS

Effective media and stakeholder communication is essential for achieving excellent returns on marketing investment. The following actions are recommended:

ACTIONS

a. Produce and publish a press kit: LTDC will compile a compendium of media information for distribution to travel media on the website (separate trade and media module) or a cloud-based file-storage platform where it can be easily accessed. The kit would include a series of destination articles and fact sheets in support of public relations and communication initiatives.

b. Publish and promote celebrity "stories", images and video clips: Press releases and social media exposure will focus on interesting newsworthy events, occurrences or phenomena relating to mountain life, heritage, cultural traditions, adventure sport achievements. Posts will be complemented by video or still images, to be shared on traditional and social media platforms.

c. Strengthen media relations: LTDC will strengthen its relationships with the international travel (trade and consumer) media and issue at least two international and local media releases per month in support of the marketing campaign to establish and maintain media awareness of tourism related developments and events in Lesotho. The following guidelines will be adopted.

- Compile and build up an appropriate database of media contacts that will include print, radio, TV, online and social media contacts.
- A specialist PR capacity will be created or outsourced to strengthen relations with travel journalists and to maintain continuity with information being distributed to the media.

d. Arrange travel press trips for international and domestic travel writers: A major emphasis will be placed on inviting and hosting high quality travel media to explore and report on their travel encounters with the area. Media would be hosted in collaboration with private operators and itineraries designed to suit the interests of media invited. International media representatives will be drawn mainly from core markets. A key element of the media program will entail be to monitor and measure media coverage following media interactions.

e. Engage and support information in independent travel guides: There is currently no stand-alone, internationally branded independent travel guide for Lesotho of the likes of Lonely Planet, Bradt Guide, Rough Guide, Michelin Guide. LTDC will investigate and engage with suitable guides with the objective of expanding information or possibly producing a separate Lesotho guide.

MICE MARKETING (MEETINGS, INCENTIVES, CONVENTIONS, EXHIBITIONS AND EVENTS)

MICE tourism is less affected by seasonality and could play a role in offsetting seasonality of tourist arrivals in Lesotho. Maseru has a good national convention centre and various hotels offer good and spacious conference facilities. The meetings and conventions industry in Lesotho is, however, not well developed. MICE marketing calls for a different approach and a dedicated strategy since the client base and distribution channels for MICE are very different to those of the leisure market. The following steps are recommended:

ACTIONS

a. Establish a dedicated MICE desk in the LTDC marketing department: This unit will develop a stand-alone strategic MICE business plan for Lesotho. It will facilitate development and bidding for national and international conferences and regional SADC

meetings. The MICE unit remit will be developed along the following guidelines.

- working in close collaboration with conference venues to promote Lesotho as a regional MICE destination of choice.
- setting up a suitable MICE inventory and database.
- packaging pre/post conference itineraries to take to market.
- developing a bidding strategy in collaboration with academic institutions, professional and sport associations.
- attending Meetings Africa, the regional trade shows for promotion of MICE.
- developing Convention Bureau measurement tools.
- hosting site inspection/familiarization trips for qualified meeting buyers.

b. Improve the overall environment for the MICE sector: Business tourism delegates place a particularly high value of personal safety, hygiene and environmental quality. The proposed MICE unit will work with and give every possible support to the National Convention Centre and other major conference venues to ensure that the environment around the city MICE nodes is safe and facilities and infrastructure are of a high standard. Special security, urban cleansing and entertainment should be arranged when large conferences are staged.

VISITOR INFORMATION SERVICES

The LTDC has visitor information offices at Maseru Border Post, Thaba Bosiu, and Moshoeshoe International Airport with part time presence at Sani Top. It is intended that the office at Butha-Buthe will also pass from the MTEC to LTDC. Tourist information services will be further improved to cater for the growing independent travel market, including:

ACTIONS

a. MTEC will conduct an assessment of the functionality and relevance of current information offices and revise locations if necessary: Each tourist information point will be carefully assessed to determine the extent to which it fits with and supports the leisure tourism growth strategy in terms of market segments served and extent and quality of enquiries. If necessary, locations and/or the type of services offered maybe changed to maximise the return on investment.

b. Improve the visitor information network at key visitor areas. Based on the assessment of visitor information offices a Visitor Information Improvement Strategy will be developed to be im-

plemented over the first 5 years of the Master Plan. The Plan will prioritise infrastructure and facilities improvement in accordance with the needs of the growing independent travelling markets. While some information points need not be staffed others may consist of unmanned display kiosks and/or interpretive maps. A phased programme of new and improved visitor information points and signage will be planned and introduced with the participation of concerned authorities.

6.6 Create a favourable business and investment climate

6.6.1 Introduction

Since the civil unrest, of 2015/16, the Government of Lesotho has been making concerted efforts to redress the, inevitable and consequent, economic downturn resulting from perceptions of insecurity. Service export industries, like tourism, suffer dramatically. Tourists are notoriously 'risk averse' and, as they have myriad choice when considering leisure pursuits, simply 'drop' such destinations from the 'shopping list'.

The 'issues' faced, by the GoL, however, are not limited to fiscal ones.

As in all economies, especially those facing 'tough' operating and governing environments, success depends upon not only putting fiscal commitments and promises, in place, along with priorities, but also translating those commitments to action – through sticking to the priorities, understanding, collaboration, cooperation and accepting a common goal.

The GoL, through the 2018/19 budget speech, has sought to address these critical aspects of economic regeneration by, firstly, identifying *"the anatomy of the crisis Lesotho faces"*

- *"Poverty, hunger and joblessness are high and even higher among the youth;*
- *Ill-health is pervasive and there is persistent mismatch between the skills needed and those that are produced;*
- *Hundreds of our young people looking for jobs*
- *The fiscal resources required to redress the situation are scarce and limit any meaningful participation by government"*

The same speech also identified a further critical aspect to the way Government governs – relating to issues of sticking to the

priorities, understanding, collaboration, cooperation and accepting a common goal.

"These agencies should be enjoined by the common objective to collectively achieve peace and stability which is so powerfully desired by this nation. But they don't; there is no clear recognition o this common objective that forms the pillar of Lesotho National Vision 2020. The cluster discussion succeeded in articulating the primacy of this purpose and how these ministries work collectively to deliver peace and stability and effective governance as the foundation on which to create jobs for our people. This government has now directed these ministries to begin to collaborate to restore governance effectiveness and achieve and sustain peace and stability."

And went on to identify solutions to address the issues in a common purpose, with establishing 'clusters' of GoL agencies across which collaboration should happen, not least of which is for those clusters to work closely with the private sector.

"For this strategy to work, ministries should pursue in earnest a formal and structured dialogue with the private sector, focussing on jobs to be created and needs by investors from Government relating to regulatory changes and targeted infrastructure.

Investor needs should thus become part of the implementation plan for Government. As government, we encourage that investors target both domestic and foreign markets. (that) is exactly intended to support investors that are contemplating sales in South Africa and other parts of the world."

Four specific sectors are targeted in the 2018/19 budget; Commercial Agriculture, Manufacturing, Tourism and Creative Art, and Technology. These four are complemented by the addition of 'Innovation' to the 2018/19 NSDP.

Tourism remains a top priority for creating jobs for our people." - Additionally, the GoL recognizes that residents of South Africa and tourists to the RSA, individually or as part of a tour operator's package, are essential to the immediate and long term success of this sector. *"The limiting factors will be availability of appropriate hospitality facilitiessuch as those found in Clarence, Golden Gate, Qwaqwa, and the Drakensberg. Govenment will also work with the Free State, Kwazulu Natal and Eastern Cape to catalyse investment in facilities on both sides of the border."*

Tourism, as it addresses many/all aspects of the Tourism Economy Value Chain, as seen in section 3.3 of this NTMP , can help, with pro-active and focused acquisition plans, assist greatly

with helping the GoL to achieve the stated economic, social and fiscal goals.

A well conceived, pragmatic, realistic, collaborative, strategy- prioritized by market demand and actioned by a systematic acquisition plan is essential. These aspects are captured in the, new, Tourism Policy 2018/19 and enabled by the updated Legal Framework and Act.

This NTMP provides not only the Strategic Framework for prioritising development, structurally, but also spatially – and provides, in the Area Action Plans, a Road Map. In parallel, the GoL has developed tourism specific Tourism Investment Policy and Incentives Report.

GoL prioritising investment in those 'enabling environment' aspects and securing both domestic and FDI investors will become part of the long term contribution that the Tourism Economy can make – and justify the well conceived vision of the GoL.

6.6.2 Business regulations and licensing

The key role of the private sector in stimulating economic growth/development is recognised by Government. In support of this policy the MTEC encourages the formation and/or engagement of businesses in tourism activities provided that they are constituted and operated in accordance with legislation and are duly registered.

Government acknowledges that it lacks the expertise to be involved in managing or operating commercial businesses in competition with the private sector. Accordingly policy is to dispose by sale, lease or management contracts through PPPs of its remaining tourism holdings and assets.

Tourism registered business will not be subjected to price control provided a competitive situation obtains. Each is free to set rates for accommodation (and other goods and services) at rates deemed necessary.

Tourism will benefit from Government's national policy to improve the business environment through coordinated and focussed actions to address competitiveness problems[8]. Lesotho ranks in 104th place (out of 190 countries) in the World Bank's 2018 Doing Business Report. It ranks at 131st (out of 137) in the

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8   Identified in the World Bank's 'Ease of Doing Business' annual reports, the Global Competitiveness Annual Report' and the World Travel and Tourism Council's biannual reports.

World Economic Forum's 2017 Global Competitiveness Index and at 128th (out of 136) in the World Economic Forum's 2017/18 Travel and Tourism Competitiveness Report. Improvement in the rankings for Lesotho will result in increased investment in the nation as a whole including tourism. An improved environment will make Lesotho a more attractive destination and result in higher tourism earning. Each of these reports identifies the factors or pillars on which performance is measured. A programme to improve Lesotho's relative standing on each is needed which would involve a study of the use of these markets in other sub-Saharan countries and successful actions taken in improve rankings.

National policy requires Ministries to pursue a formal and structured dialogue with the private sector, focussing on jobs to be created and needs of investors relating to regulatory changes and targeted infrastructure. Cabinet has instructed the economic ministries to change course and devote energies and efforts to catalyse domestic and foreign private investment. Each ministry has been instructed to report on businesses it has helped start or expand. For this strategy to work, ministries are required to pursue in earnest a formal and structured dialogue with the private sector, focussing on jobs to be created and needs by investors from Government relating to regulatory changes and targeted infrastructure. Investor needs should thus become part of the implementation plan for Government.

Businesses will be encouraged to (i) adopt equitable business practises, (ii) build partnerships in ways where risk is minimised and (iii) recognise international labour standards.

Government policy is to support small, medium and micro enterprises thereby ensuring that emerging tourism-related enterprises thrive and are sustainable, provided that such support is equitable, does not upset the equilibrium of the market and is not provided at the expense of established businesses.

The MTEC is responsible for licensing of tourism activities. This policy along with licensing of SMEs and other commercial organisations is at present under review with a view of consolidating all such activities in one body.

ACTIONS

a. MTEC will prioritise and fast-track the process of consolidating all licensing activities and housing them under one, existing, body and to ensure that, at least, the OBFC, LTDC and LNDC are fully involved in the process.

b. Pertinent investor related implications will be cross-fertilised to LTDC and LNDC operational guidelines and included in the support profiles for prospective investors and marketed positively.

6.6.3 One-stop Shop

Facilitating investor needs and advice quickly, professionally and accurately is a fundamental necessity in the 'modern' world of investor acquisition. Potential investors need to know, in addition to the operating issues of, for example, land, trained (or trainable) labour, supply of goods and services, that their set up needs and ongoing support is available. Additionally, that they can access excellent customer support of 'anything' related to the good conduct of their business and that it is easily, readily and speedily available. Finally, that they will be treated as important 'clients' that are, collectively, investing not only for profit but also in the social welfare of the country.

One-Stop-Shops are, now, a relatively common investor facilitator across many African nations and Lesotho is among them. Making it competitive will be the challenge in order that potential investors see it as being more than investor friendly. The danger is that apathy and inertia prevails, as it does in many countries, where staff see investors as 'incomers' and treat them with xenophobic attitudes. Only one result will be the outcome – the investor will go somewhere else, no matter the economic 'sense' that the business plans reveal. The majority of serious investors do not like, nor need, bureaucracy and will forego the opportunity rather than put up with less than satisfactory customer service and speed of transactions.

The GoL has, in 2009, begun the process of providing such a 'One-Stop-Shop' (OSS) - the 'One Stop Business Facilitation Centre' in Maseru and online – providing a large range of support and facilitatory services and advisories.

The cross cutting nature of the service ensures that a wide range of advice and support is available. The organisation is manned by staff of four leading Ministries - Lesotho Revenue Authority, the Ministries of Trade and Industry, Labour and Employment and Home Affairs. .MTEC, through the LTDC, and the LNDC will build close ties and relationships with the OSS so that tourism related investors have a focal point in addition to the guidance services provided by the two entities.

The mandate of OBFC is to promote investment through efficient and effective trade facilitation through the following current and potential future services:

- Traders Licences
- Manufacturing Licences
- Small scale manufacturing licences
- Export Permits/ documents
- Import permits
- Rebates
- Work Permits
- Residence Permits
- Company Registration
- Tax Registration and Clearances
- Utilities Payments
- Investment Information
- Business Statistics
- Advocacy for regulatory reform
- Tariff investigations and Trade remedies

ACTIONS

a. Align business development support Policy across responsible institutions: LTDC, in collaboration with appropriate Parastatals, will work together with the OBFC to ensure that both have identical sets of aims and aligned Policy and also agree on Investor Incentives developed as a result of actions in 7.6.4.

6.6.4 Fiscal and Tax Incentives for Investments

Government policy requires MTEC (and other economic ministries) to devote energies and efforts to stimulate private investment. Government recognises the need to encourage investment in tourism, modernise existing facilities, expand capacities and develop new products. It recognises that this must be sourced from the private sector and so policy is to create an enabling and supportive environment for investors. Accordingly the MTEC and LTDC will devote energies and efforts to encourage private investment, acting in support rather than getting into business themselves. Policy will permit serious private investors to be supported when investing even if public money is involved in, for example, a PPP.

Recognising too that the prospect of investment from internal sources is limited, foreign direct investment (FDI) will be encouraged by offering incentives no less attractive than those available in other SADC administrations. The possibility of harmonisation of incentives available for international tourism with

those applicable for the export of manufactured goods and the possibility of introducing incentives to encourage investment in community projects will be examined. Such incentives could include, for example, reduced tax rates for tourism enterprises, similar to those that exist for manufacturing industries. The MTEC must propose and motivate the Ministry of Finance for such a tax policy to be implemented. Government will cause the adherence of the Tourism Investment Policy and Incentive Report of 2018/9 and ensure that it is an integral component of the Investor Acquisition Plan.

Capital is particularly acute for start-up businesses and those lacking collateral to cover the borrowing risk. Government will explore remedies for addressing obstacles in accessing affordable capital.

Both the Ministry of Trade and Industry and the Ministry of Tourism, Environment and Culture through respective implementing agencies the LNDC and the LTDC, have responsibilities for expanding investment in tourism. To avoid duplication and confusion, MTEC Tourism Policy is that the LTDC's efforts should focus on identifying and verifying viable tourism investment opportunities, developing pre-feasibility studies, outline business plans, tourism investment opportunity portfolios, and appropriate acquisition marketing plans in conjunctions with the LNDC.

At present tourism related incentives at the LTDC are limited, in addition to full repatriation of profits, to:

- a favourable fiscal and financial environment being created to promote an attractive investment climate that offers attractive tax rates;
- value Added Tax (VAT) rate of 14% (ensuring harmonization with the RSA). The Lesotho Revenue Authority (LRA) has introduced flexible VAT payment systems, to tax complaint firms, to ease cash flow constraints; and
- double taxation agreement with the Republic of South Africa, Mauritius and United Kingdom.

The LTDC and LNDC will work together to evolve a raft of, SADC competitive, fiscal and tax incentives, handle international marketing, negotiations with interested parties and contracting and thus the existing partnership policy of LTDC and LNDC of driving investment promotion in international markets will be strengthened. Adherence to the Tourism Investor Policy and Incentives Report will be integral to the working approach.

ACTIONS

a. Align Investment Policy: LTDC and LNDC will collaborate, in conjunction with appropriate responsible Ministry, to develop a, legally enabled, coherent set of investor incentives and publish these in both organisations marketing material ensuring that SADC competitiveness is ensured and contain, where possible, clear comparative advantage for prospective, investors in Lesotho.

6.6.5 SME Development

The Tourism industry, in both the direct and indirect value chains, is characterised by the predominance of SME's, as it is globally. Thus support for the development of SMEs is a vital indicator of economic robustness so that investors can be assured of consistent supply of, quality, goods and services, in initial investment phases as well as in, later, operational activity.

It is fundamental to attracting investors that they can reduce imports, with attendant costs. A major ingredient in this assessment, and thus marketing of investment opportunities, is that the, prospective, investor can be assured that goods and services such as: fresh produce, dairy and meat products, textiles, laundry services and so forth, as well as educated and literate labour are available. These aspects are addressed by the priority sectors in the 2018/19 NSDP and dovetail directly to the economic development goals of the Government.

A vibrant and successful, nationally supported, private sector is the key to long term revival of the economy.

Financing of tourism start-ups for tourism small businesses is effectively non-existent; working capital or bridging finance is extremely difficult for would-be developers to source. To address this issue, Government has established the Investment Climate Reform Committee chaired by the Deputy Prime Minister and consisting of technical and policy players from key investment ministries. This Committee will take forward various forms of reform to make it easy to invest in Lesotho. Amongst issues that will be addressed by the committee, are the lack of capital for starting a business and difficulty of accessing working capital. Government will facilitate external financing by hedging or underwriting a portion of the lending risk if financial institutions are not prepared to cope with the issue

A Tourism Development Fund to be funded by a levy on tourism operations is recommended.

ACTIONS

a. Investment Climate Reform Committee, facilitated by MTEC & LTDC, including the lead private sector body, and in line with 2018 Investment Policy, will investigate the feasibility of creating an autonomous Tourism Development Fund to be funded by a levy on tourism operations and implement this as a priority so that essential expenditures may be committed without the need for delay as a compliment to prevailing but independent of, Government process.

6.6.6 Land Tenure

The GoL is cognisant of the intricate and complex nature of land availability and land tenure.

Investors in tourism superstructure require to be guaranteed that land is available and tenure is secured. This will involve the collaborative and cooperation approach between, primarily, the MTEC and the Ministry of Local Government and Chieftainship Affairs in an orderly, positive and supportive plan so that the LTDC and the LNDC develop the framework to 'acquire' an appropriate 'land bank' focused, in the first instance on priority investment opportunities as detailed in the Action Plans of this NTMP. Also to be contained in the Investor Opportunities Portfolio of the LTDC.

Tourism Policy outlines the rationale and position of the MTEC.

Allocation of land and grant of title in rural and urban areas must be in accordance with an approved development plan. The duration of a lease for hotel purposes is 60 years (90 years for other purposes including education, recreation and medical purposes).

Land may be expropriated for public purpose or use if necessary for the development of facilities for sport, culture, industry and tourism, including the provision of hotels.

Foreign companies wishing to invest in Lesotho may hold title to land, provided Basotho form at least 20% of the membership or shareholding of the enterprise. In considering a grant or allocation of land to a foreign enterprise the following factors are considered:

- the magnitude and origin of the tangible and intangible assets;
- employment generation;
- strategic nature of the enterprise;
- transfer of business expertise or not;

- advancement of business undertaking owned by citizens; and
- environment protection.

Under the Land Act 2010 all land in Lesotho is vested in the Basotho nation and held in trust by the King. Persons can only hold title to land as provided for by the Act with power to grant titles vested in the King. An investor friendly land acquisition policy that attracts direct investment in tourism, is fundamental.

ACTIONS

a. LTDC, in collaboration with the LNDC, will work closely with the Ministry of Local Government and Chieftainship Affairs to identify land issues related to priority development prospects contained in the NTMP and Action Plans and 'clear' the way forward in order that, land tenure issues are completed, in principle, prior to any investor interest. Statements to this effect to be included, as a key 'selling' point in the Investment Opportunities Portfolio.

6.7 Ensure environmental and social sustainability

Development is not without harm. Environmental and cultural resources are finite and some are already under pressure; the possibility of irreparable damage and loss arising from economic and social expansion is real. Inappropriate development can engender negative impacts on local livelihoods. It is clear that the challenge is not only to stimulate growth but also to control and channel it along the lines of a strategic vision so as to ensure the sustainability of the ensuing development.

ENVIRONMENTAL ISSUES

Over the geological eras, Lesotho landscapes have been shaped by opposite phenomena of tectonic shifts, uplift and erosion. The mountain ranges of Drakenseberg and Maloti are the result of geological uplifts, while the rivers have carved valleys and dramatic gorges in the rock plateau. Peculiar geological phenomena have conserved dinosaur footprints. Erosion originated the typical "canopy" rock formations, that gave shelter to the San people, and where they have left behind them the typical rock art expressions.

Fig. 26 – Horsemen at Sani Top

Lesotho has very little **area under protection** with only 14,299 hectares (less than 0.5 %) of it being formally protected. The three formally protected areas (Sehlabathebe National Park, Bokong Nature Reserve and Tsehlanyane National Park) are currently the only effective conservation areas.

Furthermore, it should be noted that heritage assets (particularly bushmen paintings) are not adequately protected and the risk of partial or total loss is relevant.

SOCIAL ISSUES

The assessment has shown an exceptionally high unemployment rate of averaging around 28% as of October 2018[9], and a very high underemployment in the sector, related to a very low average annual occupancy rates of around 30% in hotels and all accommodation facilities. Therefore, job creation is an important benefit associated with tourism growth. The labour-intensive nature of tourism and its potential to raise incomes in disadvantaged areas is recognised as a key factor in creating employment in areas which otherwise have few resources. Increasing intensity and focus of joint-marketing to get better bed-night utilisation is a key factor in helping to 'fix' both. However, local communities – especially those in the most remote areas, are inherently fragile. Therefore many safeguards need to be undertaken to ensure that communities are positively involved in tourism to improve incomes and employment particularly in disadvantaged areas, while safeguarding the local culture and social fabrics.

CLIMATE CHANGE

Lesotho is categorized as one of the countries highly vulnerable to the impact of climate change (WB, 2014). The country experi-

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[9] Trading Economics – October 2018.

ences droughts, floods, frosts, heavy snowfalls, strong winds, hailstorms, and tornadoes. Lesotho's vulnerability to climate change and climate variability arises from several factors: erratic rainfall, fragile soils, and worsening land degradation in the face of a growing population.

Vulnerabilities are exacerbated by poor land-management practices, particularly in the livestock sector: two-thirds of Lesotho's land area is rangeland, and grazing is the principal land use (WB, 2011). Due to overgrazing, the shrub vegetation and grassland that should dominate the Foothill and Mountain Regions is now very sparse. When combined with Lesotho's characteristically steep slopes and semi-arid climate, this loss of vegetation worsens the water and wind erosion that plays a significant role in land degradation.

ACTIONS

Environmental

a. Conservation of the natural environment and cultural heritage (both material and non-material) is a key factor in sustainability. The word "heritage" itself is a reminder that the richness received from past generations must be transferred undamaged to future generations. Strict recommendations should be adopted for appropriate safeguards to be adopted in the implementation of the NTMP.

b. All the recommendations for tourism found in the National Climate Change Policy (2017), "Policy statement 7: climate proof and increase the efficiency of the tourism sector", should be adopted.

c. Conduct a full audit of suitable areas to be inscribed as new Protected Areas. The area of the country under protection would be increased accordingly, with a particular focus on surviving indigenous forests, the Maloti-Drakensberg escarpment, the waterfalls area.

The Maloti Drakensberg and Water Supply Programme- bilateral programme) has identified 8 priority cluster areas, presented in map 1, that should be established as "Managed Resource Areas" or as smaller "Protected Areas" (MTEC, 2014):

- Oxobow/Senqu Sources Cluster
- Quthing/Letseng-La-Letsie Cluster
- Mokhotlong Sources Cluster
- Sehlabathebe Custer
- Corridor Node
- Senqunyane/Mantsonyane Cluster

- Bokong/Tsehlanyane Cluster
- Makhaleng/Mokhehle Range Cluster

Existing plans for the establishment of protected areas will be reviewed and, if found valid, put in operation.

d. Particular attention will be paid to the conservation of wetlands, as they provide an extraordinary habitat for biodiversity and an important ecosystem service by absorbing water and providing protection from floods, providing for groundwater storage, recharge, discharge, river flow regulation and retention of toxic substances.

e. Design and develop an emergency action plan and develop a communications strategy to inform the Nation and international community. An integral component will be to survey all heritage sites and ensure protection of artefacts and cultural properties against damage, vandalism and any other risk of loss.

f. Lesotho has a small carbon footprint. This will be included in the Marketing Strategy as marketing tool to be exploited, particularly for those markets where there is a higher level of sensibility for environmental issues and where "greenness" could influence the choice of a destination. However, the country signed the Paris agreement in 2016 which foresees the limitation of the increase of the global average temperature to well below 2°C, and in order to do so the global GHG.

Social

The following guidelines will be adopted to comply with the social responsibility commitments that the tourism industry can contribute to the National agenda.

Fig. 27 – Bokong Nature Reserve

g. RT principles will be adopted as the overarching guide to ensure the social sustainability of tourism (→ see section 3.2).

h. Local communities will be involved actively in planning and decision-making and capacity building provided to make this a reality.

i. Local economic benefits will be maximised by increasing linkages and reducing leakages, by ensuring that communities are involved in, and benefit from, tourism. Wherever possible tourism must be used to assist in poverty reduction by adopting pro-poor strategies.

j. Equitable business practices will be adopted that pay and charge fair prices and build partnerships in ways in which risk is minimised and shared and staff are recruited and employed recognising international labour standards.

k. Appropriate and sufficient support will be provided to small, medium and micro enterprises to ensure tourism-related enterprises thrive and are sustainable.

l. Partnerships will be encouraged by the MTEC between tourism establishments and communities to maximize the poverty alleviation benefits of tourism development.

m. Tour operators will be encouraged to work with community based tourism businesses and promote the use of tourism products and integrate these into mainstream, traditional tourism routes.

n. Tourism will be marketed in ways which reflect the natural, cultural and social integrity of the destination and which encourage appropriate forms of tourism.

o. Good social communication is key to achieving RT targets and this will be included in Market Plans. It will have a twofold approach: one directed to Basotho and the second to potential visitors. The objective will be to encourage favourable behaviour among Basotho to tourists and also to insure that foreigners' behaviour respects local ethics, morals and values.

p. When applying for approvals to Planning Authorities, developers will be required to assess economic impacts before developing tourism and exercise preference for those forms of development that benefit local communities and minimise negative impacts on local livelihoods.

q. Social impacts throughout the life cycle of the operation including the planning and design phases of projects will be assessed in order to minimise negative impacts and maximise positive ones.

r. Education and awareness for sustainable development will be promoted for all stakeholders. Key MTEC and LTDC staff involved in tourism development and management will be properly trained on the principles of RT and their practical application.

Building

s. As part of the QualStar programme, existing room stock will be assessed for their upgrading potential, with a focus on sustainability. Owners of lower rated accommodation facilities will be encouraged to upgrade their properties, in line with the overall objectives of increasing quality of service and increasing the daily average yield. An upgrading campaign would adopt the objective of reducing the environmental footprint of buildings by adopting low environmental impact measures, including where possible the use of green building concepts, renewable energy sources, water recycling, proper solid waste management, reduction of water and energy consumption.

t. Wherever applicable, green building concepts will be used in new facilities and in retrofitting the existing built stock, as well as using best practice renewable generation technologies in conjunction with energy efficient buildings.

u. Current procedures in place for EIA are to be regarded as a key safeguard to avoid negative environmental impacts of tourism facilities.

v. The Lesotho Quality Star Grading System in place already includes measures to encourage owners of accommodation facilities towards more sustainable operations. Under the heading "Responsible tourism", the grading checklist makes appropriate provisions for sustainable buildings, including energy conservation, water conservation and waste management. This will be encouraged by the provision of suitable incentives.

RECOMMENDED GREEN BUILDING CRITERIA

☑ Understand site resources and carefully interpreting the site (amongst others morphology, panoramic viewing angles, existing vegetation, nature of soil, existing roads)

☑ Minimize the environmental impact of the facilities during construction, operation and dismantling.

☑ Focus on the full integration of new settlements within the surrounding context.

☑ Conceive the overall layout so to minimize dependence from vehicular transport.

☑ Design hard and soft landscaping to be water-efficient and require low maintenance.

☑ Design building to be compact and energy-efficient, to provide for the use of renewable energy, and to make it easy for occupants to recycle waste.

☑ Understand traditional building (e.g. the traditional hut) and use as founding concepts in contemporary design.

☑ Select building materials keeping in mind durability, future reuse, and adaptability. When possible, reuse material from older buildings.

☑ Select building services giving priority to high-efficiency heating and cooling equipment, water-efficient equipment, high-efficiency lights and appliances.

☑ Use renewable energy: rooftop solar energy, photovoltaic, solar water heating.

☑ Adopt an effective water management strategy: rainwater harvesting, grey-water recycling, water recycling, low volume dual flush toilets, tap aerators.

☑ Ensure energy efficiency by: highly insulating the building shell; carefully sealing any opening to the outside (as doors, windows, ventilation shafts, and utility conduits); using energy-efficient appliances and heating, ventilation and air conditioning systems; use light coloured roof material to reduce heat absorption during summer (a green roof is preferable as it can also retain storm-water run-off on site).

☑ Orient buildings north to maximise the solar exposure during winter months; use large windows to allow low-angle winter sunshine to heat rooms (during summer sunshades can keep out the high-angle summer sunlight); use thick walls or floors to retain winter warmth or summer cool.(passive solar design).

☑ Use small secondary windows high up in the wall to increase the incoming light and reduce artificial lighting needs.

7. Spatial development framework

Fig. 28 – Landscape, Senqu River Valley

7.1 Overall spatial concept

The concept described in this section represents the spatial transcription of the tourism development strategies described in section 6. It takes into account the results of the assessment carried out at the previous stages of work, including the main territorial structure and networks of the country.

The spatial concept recognizes and organizes the data, below, to ensure a clear focus and to provide a practical tool to keep the physical development of tourism under control. It takes into account, amongst others:

- orography, hydrography, and natural features;
- existing tourism attractions, facilities and potential for development and/or re-.development;
- natural and cultural heritage of the country;
- main towns and settlement;
- organization and distribution of protected areas, National Parks and Trans-Frontier Conservation Areas, including sites listed in the World Heritage List;
- main gateways (airports and land border posts); and
- transport networks (roads, internal air).

Map 3 presents the key elements of access and transport.

The spatial concept rests on four categories of elements:

- **Routes** are portions of national transport systems, connecting tourism nodes, strategically earmarked for in-country circulation of tourists.
- **Gateways** are essential point of access to the country. They are part of major transport networks, and their creation and operation requires major investment.
- **Tourism nodes** are clusters of interlinked attractions, activities, facilities and/or amenities within a reachable distance of 1-2 hours driving.
- **Tourism zones** are areas earmarked for their suitability to accommodate tourism development.

While the physical plans related to tourism are not regulatory plans, it is recommended that the priorities and directions set forth by the NTMP are considered as key inputs for the preparation of spatial plans at the level of Provinces, Districts and/or individual towns.
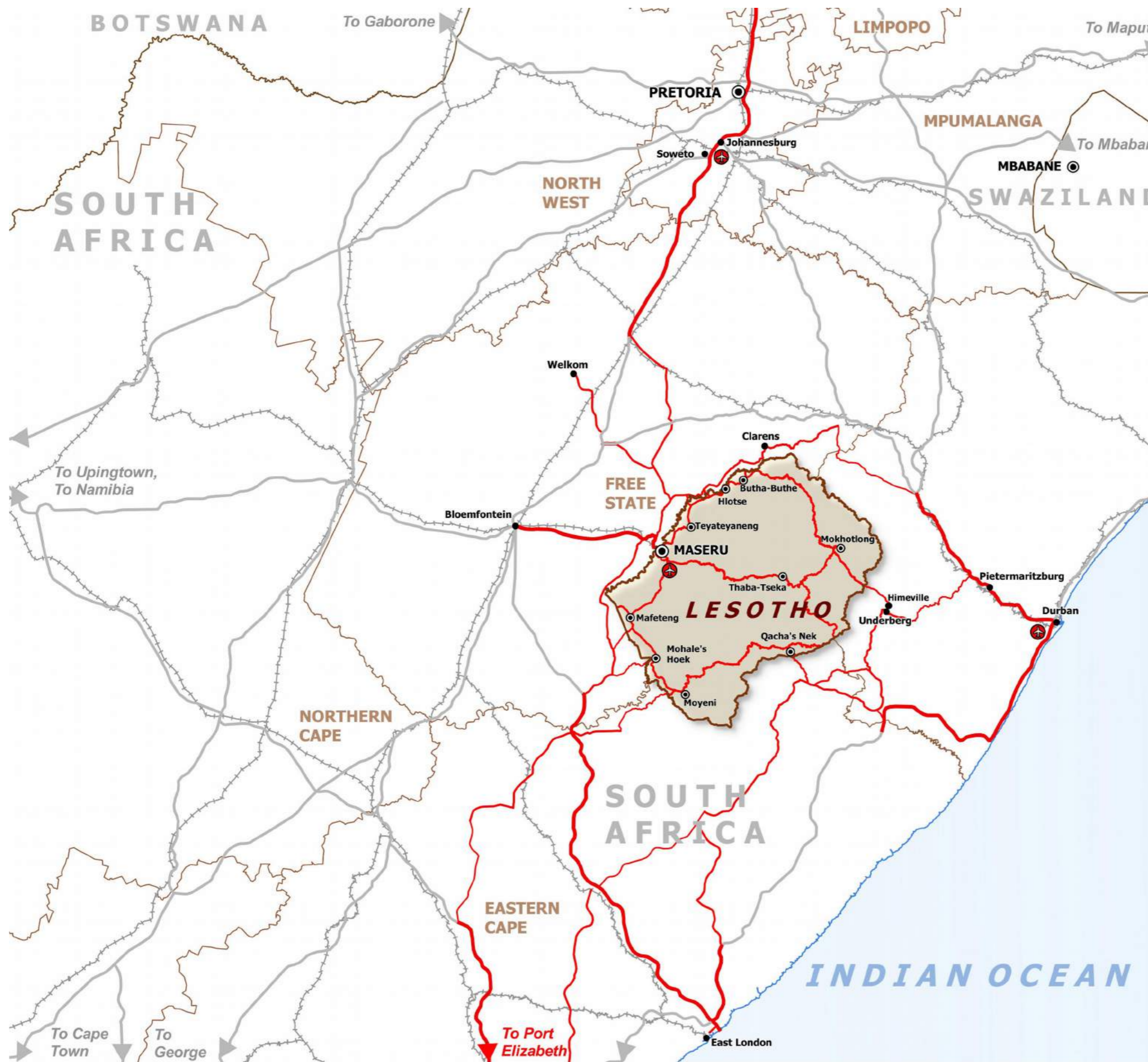
Map 3

Lesotho-RSA main connections

Legend:
- National Boundary
- Provincial Boundary
- ⊚ National Capital
- ⊙ Lesotho District Capital
- • South Africa's main town
- Main connection
- Railway connection
- ⊕ International Airport

Source
- www.viamichelin.it

0   50   100 km

1:3,500,000
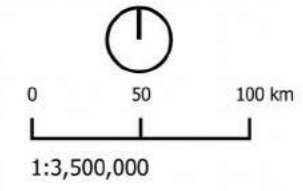
7.2 Routes

Routes are portions of national transport systems, connecting tourism nodes, strategically earmarked for in-country circulation of tourists. They are part of existing road network which fulfil the primary purpose of ensuring effective circulation of people and goods across the country, including tourists' goods and services to be consumed in tourism; their role is vital for tourism development. The tourism routes identified by the NTMP are presented in table 28.

It should be clarified that the tourism routes below have not been identified for marketing purposes; marketing (→ see section 6.5) can use them as "building blocks" for various types of thematic tours and experiences by joining them or making use of just some stretches.

Nevertheless, the large majority of roads earmarked as tourism routes is characterized by outstanding landscape values of scenic beauty.

The **minimum standards** that should be ensured by each route are:

− level of service of the road (minimum average speed of 50 km/h, excluding 4×4 only routes);

− safety and security of tourists with clear signage at stopping points with instructions in case of emergency;

− sufficient roadside amenities (service station with parking, resting area, fuel, food and beverage) at least every 200 km;

− well-equipped parking areas at scenic viewpoints with interpretation; and

− mobile phone and internet coverage for the whole length of the route;

− a well-conceived and coherent signage system at international standards in place.

Table 26 – Tourism routes

	Route	From	To	Distance	Remarks
1	Northern Route	Maseru	Butha-Buthe	123 km	Mainly transfer
2	Maloti-Drakensberg Highlands route	Butha-Buthe	Sani Pass	210 km	Scenic route, above all from Sani Pass to Oxbow (near Afriski).
3	Southern Route	Maseru	Senqu River Valley crossing (near Alwyns Kop)	168 km	Segment from Maseru to Malealea, high tourist character. This segment allows the access to tourism sites of Morija, Matsieng and Malealea. Last segment mainly transfer
4	Senqu River Valley route	Senqu River Valley crossing (near Alwyns Kop)	Qacha's Nek	177 km	Scenic route, Senqu River Valley
5	Central Highlands route	Nazareth (Maseru)	Thaba-Tseka	128 km	Scenic route, full of passes/scenic points
6	Tselanyane Access Route	Butha-Buthe	Tselanyane	35 km	---
7	Highlands Dam route	Hlotse	Thaba Tseka	177 km	Scenic route
8	Waterfalls route	Mazenod	Seforong	158 km	Scenic route
9	Escarpment Route	Mokhotlong	Qacha's Nek	190 km	Scenic route
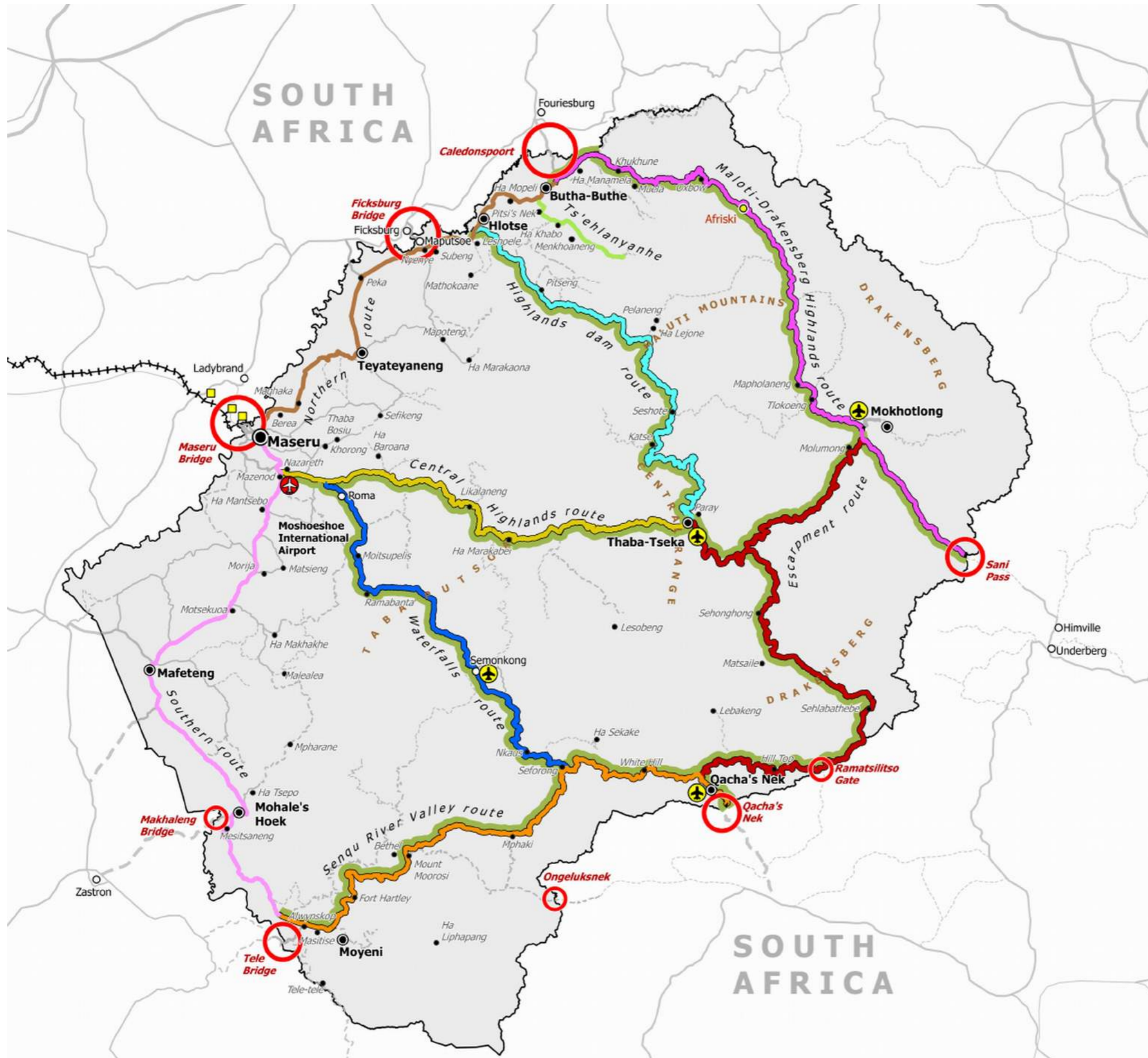
## Map 4
Tourism routes

Tourism corridors

—— Scenic route

Tourism routes

—— Nothern route
—— Maloti-Drakensberg Highlands route
—— Southern route
—— Senqu River Valley route
—— Central Highlands route
—— Tselanyanhe access route
—— Highlands dam route
—— Waterfalls route
—— Escarpment route

Transport

◯ Border post relevant for tourism access to Lesotho

✈ InternationalAirport

✈ Airstrip ready to receive small charters

◻ Railway station

+++ Railway

1:1,000,000

0   10   20 km
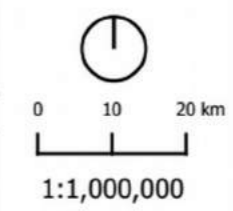
7.3 Gateways

Gateways are essentially the points of access to specific parts of the country and they are nodes of major transport networks that vitally connect Leostho with South Africa (see map 5). They are part of major transport networks, and their creation and operation requires major investment. Table 27 presents the most relevant gateways for the purpose of the NTMP.

Table 27 – Tourism land gateways

Border post	Connected tourism routes
Maseru Bridge	– Northern Route – Southern Route – Waterfalls route – Central Highlands route
Makhaleng Bridge	– Southern Route
Tele Bridge	– Southern Route – Senqu River Valley route
Ongeluksnek	– Senqu River Valley route
Qacha's Nek	– Senqu River Valley route – Escarpment Route
Ramatsilitso Gate	– Escarpment Route
Sani Pass	– Maloti-Drakensberg Highlands route
Caledonspoort	– Maloti-Drakensberg Highlands route – Northern Route
Ficksburg	– Northern Route
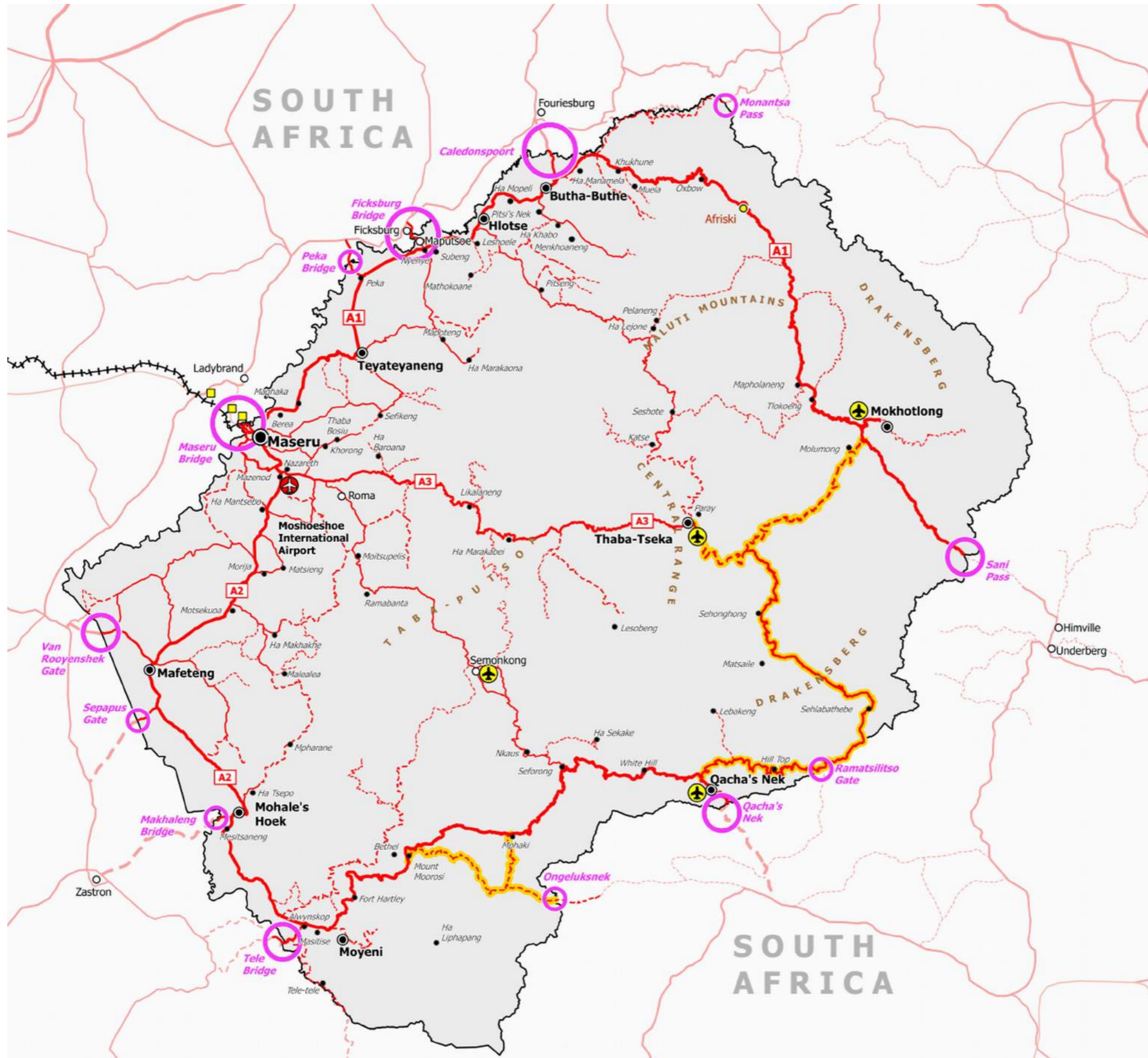
Map 5

Access and transport

Legend:
- Primary tarred corridor
- A1 - Main North Road
- A2 - Main South Road
- A3 - Central connector linking
- Main primary untarred road - Central Corridor
- Secondary tarred road
- Secondary untarred road
- Track
- Railway
- International Airport
- Airstrip ready to receive small charters
- Railway station

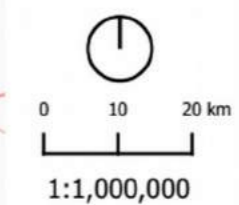**Planned and ongoing road projects**
- Road rehabilitation

Border post
Arrivals/Year (2016)
- > 100,000
- 100,000 - 10,000
- < 10,000

Source
- LTDC (2017)

0   10   20 km

1:1,000,000

7.4 Tourism nodes

Tourism nodes are clusters of interlinked attractions, activities, facilities and/or amenities within a reachable distance (1 – 2 hours). They are often functionally and economically connected to local communities. Towns along the routes are tourism nodes insofar that they provide direct (e.g. accommodation, dining) and indirect (e.g. banking, supplies) services for the tourism economy.

The tourism nodes identified by the NTMP are presented in table 28.

Table 28 – Tourism nodes

	Node	Main town	Connected tourism routes	Priority products		Other key elements in the node
1	Maseru and surroundings	Maseru Roma	Northern route Southern route	– Thaba-Bosiu National Monument, Cultural Village and craft centre – Cultural buildings, Basotho craft Centre in Maseru – Dinosaur footprints (Roma) – Ha Kome Cave	– Mountain biking trails, such as Lesotho Sky mountain-biking race (Roma trading post) – Water based activities (Maqalika Dam) – Thaba-Bosiu, Roma (Missionary site) – Venue for cultural events (Maseru, Thaba-Bosiu)	– Moeshoeshoe International Airport – Roma trading post – Thaba-Bosiu CV – Maseru city tour (LTDC feasibility study)
2	Morija	Morija Matsieng	Southern route	– King's Palace (Matsieng) – Morija Museum and Archives – Matsieng Royal Archives & Museum – Morija/Matsieng craft centre	– Dinosaur footprints (Morija) – Detailed info about Morija Festival – Morija missionary site – Venue for cultural events (Morija)	– Morija Guest House
3	Malealea	Malealea		– Gate of Paradise pass – Thaba Putsoa – Botsoela Falls – Ribaneng river	– Mountain biking trails, such as Malealea loop – Trekking trail – Pony trekking (from Malealea Lodge to Botsoela falls)	– Malealea lodge
4	Semonkong	Semonkong	Waterfall route	– Maletsunyane falls – Ketane falls – Bird watching site – Mountain biking trails, such as Roma-Semonkong trail	– Trekking trail – Pony trekking (from Semonkong lodge) – Paragliding – Adventure sports in general (abseiling, rafting,…) – Venue for cultural events (Semonkong)	– Semonkong airstrip – Semonkong lodge – Semonkong waterfalls resort (LTDC feasibility study)
5	Southern Node	Moyeni	Senqu river valley route	– Letseng-la-Letsie – Rock art site (Qomoqomong river, Ha Liphapang, Letseng-la-Letsie) – Historic site of Mount Moorosi – Masitisie Cave House & Museum – Quthing Dinosaur footprints	– Bird watching area and site – Mountain biking trails – Trekking trail – Pony trekking trail – 4x4 trail (Quthing Valley 4x4 route) – Mount Moorosi (Missionary site)	– Letseng-la-Letsie Adventure resort (LTDC feasibility study)
6	Sehlabathebe National Park		Escarpment route	– Sehlabathebe NP – Rock art site – Mountain biking trail, such as Mountain biking and 4x4 route	– Trekking trail – Pony trekking – Rock climbing – Venue for cultural events (Sehlabathebe Mountain health and wellness resort)	– Sehlabathebe lodge – Sehlabathebe National Heritage centre – Sehlabathebe Mountain health and wellness resort (LTDC feasibility study)
7	Sani Top		Escarpment route	– Sani Pass – Thabana Ntleyana – Bird watching site	– Trekking trail – Pony trekking – Adventure sports in general	– Sani Top Lodge – Sanitop equestrian and ski resort (LTDC feasibility study)
8	Oxbow	Oxbow	Maloti-Drakensberg Highlands route	– Snow-ski facility – Mountain biking trail – Trekking trail	– Paragliding – Liphofung cave – Rock art site (Liphofung cave)	– Afriski resort – Oxbow lodge
9	T'selanyane National Park	Butha-Buthe	T'selanyane access route Highlands dam route	– Ts'ehlanayane NP – Bokong NR – Mafika Lisiu pass – Bird watching site	– Pony trekking – Butha-Buthe plateau (Missionary site) – Venue for cultural events (Butha-Buthe, Ha Lejone)	– Maliba lodge – Riverside chalet – Bokong lodge
10	Katse	Katse	Highlands dam route	– Katse Dam – Water-based activities (Katse dam)	– Pony trekking – Venue for cultural events (Katse village/lodge)	– Katse lodge – Katse tourist village and golf resort (LTDC feasibility study)
11	Mohale		Central Highlands route	– Mohale Dam – Qiloane falls – Ha Baroana rock site – Water-based activities (Mohale dam)	– Mountain biking trail – Paragliding – Pony trekking – Adventure sports in general – Venue for cultural events (Mohale Dam)	
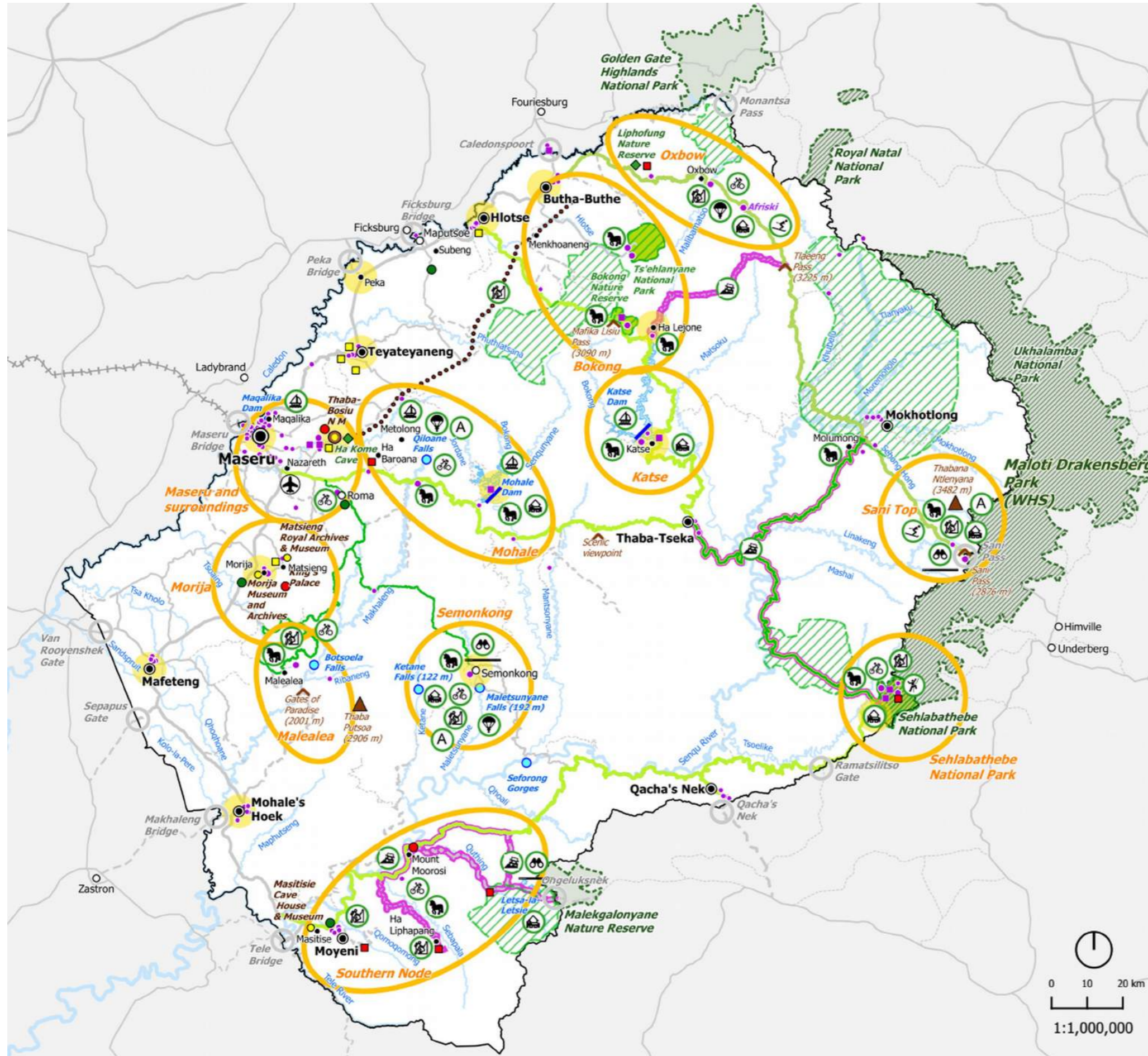
Map 6

Tourism nodes

- ⬭ Tourism node

Culture-based attractions
- ■ San rock art site
- ● Historic site
- ● Museum
- ▣ Art work, craft centre
- •••• Heritage trail
- ◯ Venue for cultural events

Nature-based attractions
- ▨ World Heritage Site
- ▨ Transfrontier Conservation Area
- ▨ National park, nature reserve
- ▲ Mountain/Peak
- ⌃ Pass
- — Scenic route
- ◯ Waterfall, gorge
- ▨ Waterbody
- — Major River
- — Secondary River
- ◆ Cave
- ● Dinosaur footprints
- ⊚ Bird-watching site
- ▨ Bird-watching area

Other attractions
- ⊚ Mountain biking
- — Mountain biking trail
- ⊚ Trekking trail location
- ⊚ Pony trekking location
- ⊚ Water-based activity
- ⊚ Snow-ski facility

Adventure activities
- ⊚ Off-road motorcycling and 4x4 trail location
- — Off-road motorcycling and 4x4 trail location
- ⊚ Paragliding
- ⊚ Rock climbing
- Ⓐ Adventure sport

Tourist facilities
- ■ Tourist info centre, visitors centre
- • Accommodation
- ◉ Cultural village
- ⊚ High quality spa and wellnes, resort

0   10   20 km

1:1,000,000

7.5 Tourism zones

Tourism zones are areas earmarked for their suitability to accommodate tourism development. They are identified e.g. by looking at clusters of existing and potential tourism products. Their boundaries are indicative, experientially defined 'spaces' and are not binding in regulatory terms.
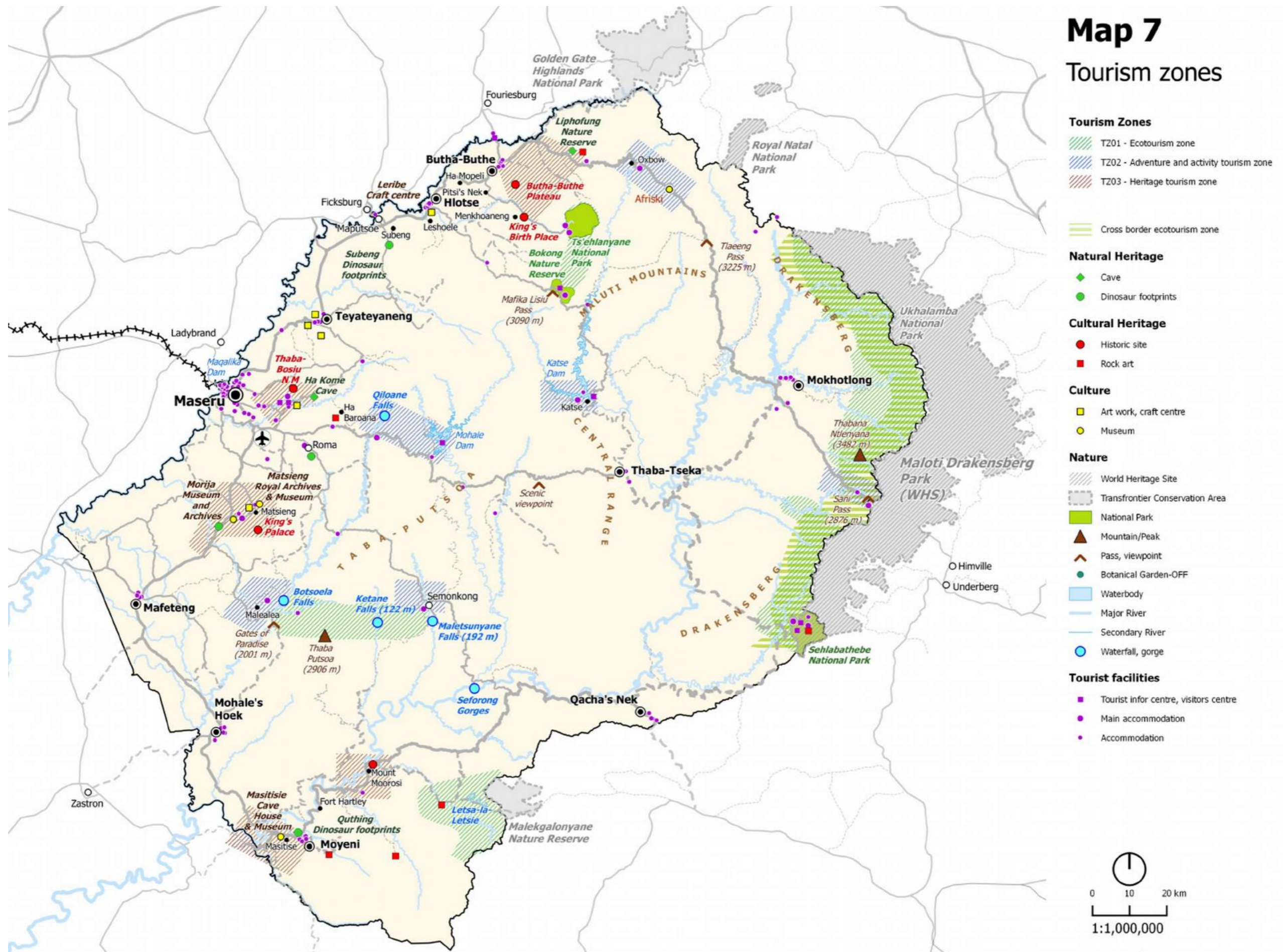
The tourism zones identified by the NTMP are presented in table 29.

Table 29 – Tourism zones

Designation	Tourism Activities/ Attractions	Structures	Guidelines and safeguards
Eco-tourism zone (TZ01)	− Hiking − Trekking − Pony-trekking − Mountain-biking − Bird watching − Culture, heritage and people − Dinosaur footprints − Rock paintings	− Trails (walking/horse-riding/mountain-biking) − Unobtrusive signage − Equipped resting points − Construction of lodges and/or camps with a maximum capacity of 20 units (40 beds). − Small scale permanent facilities built with traditional techniques (e.g. rondavels). − Motorized trails (e.g. 4×4) only in specific precincts/areas	− No motorized activity − Indirect tourism supply side activities are excluded − Max height = 1 floor − Tourism uses permitted provided that they do not (a) damage the natural vegetation of the area (b) introduce non-indigenous vegetal or animal species; and (c) produce any avoidable adverse effects on nature and landscape − Community involvement must be ensured
Adventure + activity tourism zone (TZ02)	− All the above (TZ01) − Mountain climbing − Abseiling − Extreme sports − Water sports − Motorized adventure trails (4x4, etc.) − Culture, heritage and people − Dinosaur footprints − Rock paintings	− Trails/signage/resting points (same as above) − 4×4 tracks − Construction of lodges (no limits of capacity) − Development of guest houses and B&Bs − Development of low-impact attractions with related access facilities (see checklist)	− Buildings shall be of vernacular style and conform to "green building" standards. − Community involvement must be ensured − Tourism uses should not produce any avoidable adverse effects on nature and landscape
Heritage tourism zone (TZ03)	− Cultural tourism − King Moshoeshoe trail − Missionary trail − Culture, heritage and people − Dinosaur footprints − Rock painting	− Development of cultural/historic attractions/sites with related access facilities (see checklist) − Development of historic trails (walking/horse-riding/mountain-biking) − Events and festivals − Development of any kind of accommodation	− Buildings in natural settings shall be of vernacular style − All buildings shall conform to "green building" standards − Conservation of cultural/heritage property must be ensured − Community involvement must be ensured

Map 7
Tourism zones

Tourism Zones

- TZ01 - Ecotourism zone
- TZ02 - Adventure and activity tourism zone
- TZ03 - Heritage tourism zone

- Cross border ecotourism zone

Natural Heritage

- ◆ Cave
- ● Dinosaur footprints

Cultural Heritage

- ● Historic site
- ■ Rock art

Culture

- □ Art work, craft centre
- ○ Museum

Nature

- World Heritage Site
- Transfrontier Conservation Area
- National Park
- ▲ Mountain/Peak
- ∧ Pass, viewpoint
- ● Botanical Garden-OFF
- Waterbody
- Major River
- Secondary River
- ○ Waterfall, gorge

Tourist facilities

- ■ Tourist infor centre, visitors centre
- ● Main accommodation
- • Accommodation

0   10   20 km

1:1,000,000

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Arduino, G., Bono, P., Del Sette, P. (XXXX) – Hydrogeological map of Lesotho 2

Bokong Nature Reserve mao (LHDA)

Drakensberg Tourist map (www.Drakensberg-tourist-map.com)

GofUk (1982) - Geological map of Lesotho_North

GofUk (1982) - Geological map of Lesotho_South

GoL (1967) - Sheet soils map of Lesotho_East

GoL (1967) - Sheet soils map of Lesotho_West

GoL (1978) - Map of Lesotho

GoL (2011) - Lesotho livelihood zones map

Large detailed tourist map of Lesotho (OnTheWorldMap website)

Lesotho Map (VriendenvanLeseli website)

Lesotho Roadmap (Ezilon 2009 website)

Lesotho Tourismmap (Visitlesotho website)

Map of Lesotho tourism (LTDC)

Uni of Pretoria - Lesotho agro-ecological zones map