LESOTHO

TOURISM DEVELOPMENT CORPORATION

International Arrivals & Accommodation Statistics 2023

Contents

FOREWORD

The UNWTO indicates that the tourism industry has the potential to directly contribute to the United Nations 2030 Agenda for Sustainable Development and the attainment of the SDGs. This challenges us to raise awareness of the contribution of tourism to socio-economic development amongst public and private sector decision-makers and the general public, and to position the sector as a driver of sustainable and inclusive growth. To achieve that, all our policies and business practices need to be aligned with the latest trends, making statistical analysis critical and invaluable for the industry.

In that spirit, Lesotho Tourism Development Corporation (LTDC) regularly collects and analyses tourism related data to help inform industry's decision making, formulation of data-driven strategies for improved tourism business development and planning.

This report presents analysis of international arrivals and accommodation statistics which portrays the progress made by Lesotho's tourism sector towards recovery. It shows that Lesotho's tourism industry continues to steadily recover post the halt in 2020. This is evident from the 35.6% increase in international arrivals in 2023 as compared to the previous year. South Africa remained the major source market for arrivals to Lesotho,although there was a slight drop in its arrivals which added up to 89.6% of total arrivals. Zimbabwe, Botswana, USA and India also registered notable numbers.

Accommodation sales saw a growth of M100m in 2023, reaching M450m revenue generated from accommodation, Food & Beverages and other services within the hospitality sector. Significant gains were observed in February, March, July, August, October and November where guest nights and bed occupancy rates were notably high as compared to other months. The average bed occupancy rate was 19.9% in 2023. This was 1.6 percentage points higher than in 2022. Overall, the pattern reflected positive prospects except when unpacking revenue further by status of residence of guests, it turns out similar to previous years, more revenue was accrued from locals than Non-locals, which implies that we need to do more on promotion of overnight stays and spending among the Non-locals.

That being the case, innovative strategies need to be put in place towards development of exciting tourism products that will attract a wide variety of tourists and cater for their needs. In that manner, seasonality will be minimized and length of stay maximized, which both will translate to increased occupancy rates for both domestic and international tourists.

The observed trends also speak to our marketing efforts, and it goes without saying that we need to tap on the opportunities of newly emerging markets such as USA, India, China and improve our marketing strategies to restore Germany and Netherlands to their pre-pandemic ranking as the report indicates that arrivals from these countries are increasing significantly.

We wish to take this opportunity to extend our sincere appreciation and thanks to all our valued stake holders who have offered support towards consolidation of this report. We further encourage all tourism enterprises to continue submitting the statistical returns for smooth facilitation of future reports, which will go a long way towards efficient planning and monitoring of the industry.

Lets Measure, Plan, Attract and Grow!!

International Arrivals

INTERNATIONAL ARRIVALS BY COUNTRY OF RESIDENCE

Figure 1:Percentage distribution of arrivals by gender

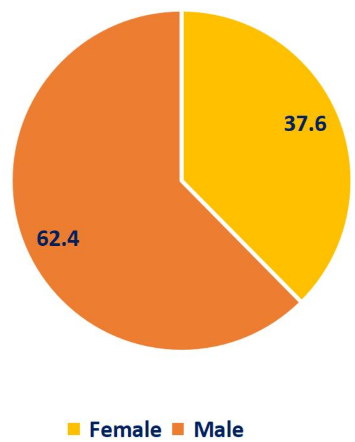
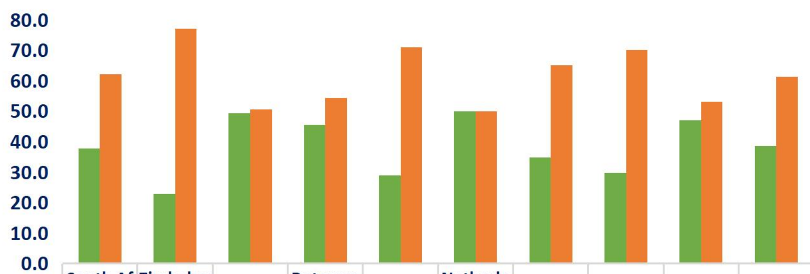


Figure 2:Top 10 source markets by gender



	South Africa	Zimbabwe	USA	Botswana	India	Netherlands	China	Eswatini	Germany	UK
Female	37.8	22.8	49.4	45.7	28.9	50.0	34.8	29.9	47.0	38.6
Male	62.2	77.2	50.6	54.3	71.1	50.0	65.2	70.1	53.0	61.4

Figure 1 indicates that:

- Males constituted a larger proportion of international arrivals at 62.4% compared to 37.6% for females respectively.
- Males may have travelled to Lesotho more frequently than females possibly for business purposes, visiting friends and family or even for thrilling and exciting adventure activities that are more appealing to them.

Figure 2 reveals that:

- South Africa constituted a higher proportion of males (62.2%) than females (37.8%) respectively.
- Zimbabwe, India, and Eswatini had a higher percentage of male travelers, suggesting that males from these countries were more engaged in activities requiring travel to Lesotho. Specifically, Zimbabwe had 77.2% male and 22.8% female travelers, India 71.1% male and 28.9% female travelers while Eswatini had 70.1% male and 29.9% female travelers respetively.
- USA, Botswana, and the Netherlands had a relatively balanced gender distribution, indicating that a wide range of activities and purposes for travel appealed equally to both men and women. Specifically, the USA had 50.6% male and 49.4% female travelers, Botswana 54.3% male and 45.7% female travelers, while Netherlands had an equal distribution of 50.0% male and 50.0% female travelers.

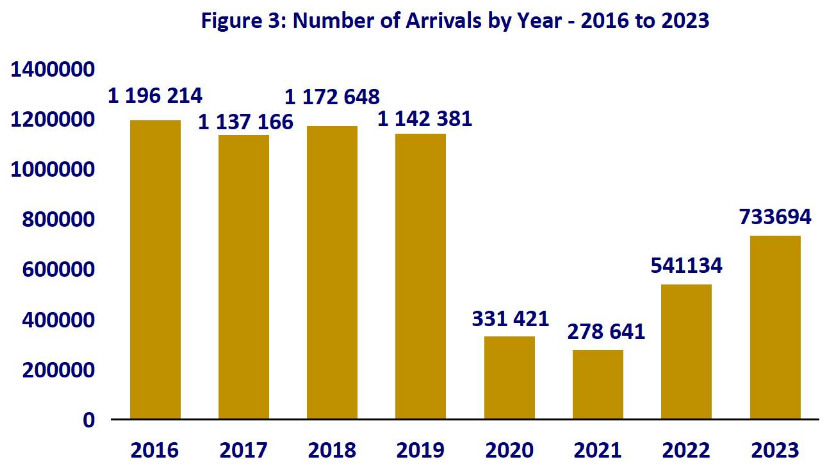


Figure 3 indicates that:

- Arrivals in 2023 totaled to 733,694, an increase of 35.6% from 2022 (541,134), indicating a continued upward trend in Lesotho's international arrivals.
- The increase in 2023 builds upon the strong recovery observed in 2022, where arrivals had nearly doubled from 278,641 in 2021 to 541,134, reflecting a 94.2% increase.
- The growth in 2023 indeed demonstrates sustained positive momentum suggesting that post-pandemic tourism revival strategies and the opening up of borders have been effective.
- Although the number of arrivals in 2023 have not yet returned to the pre-pandemic levels of 2019 (1,142,381), the consistent year-on-year growth from 2021 through to 2023 shows positive momentum toward full recovery.

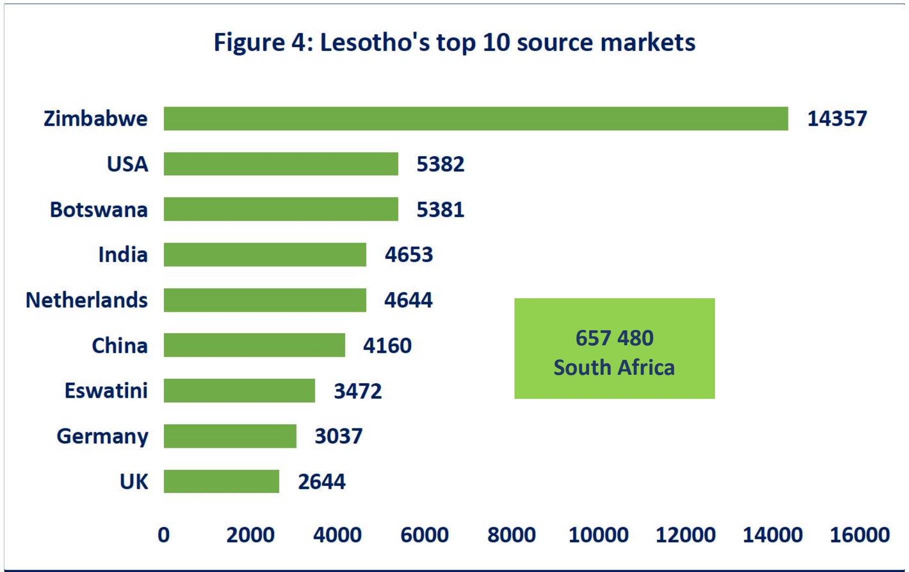


Figure 4 shows that:

- South Africa was the largest source of international arrivals, accounting for 89.6%, indicating strong bilateral travel ties as well as geographic proximity between the two countries.
- Following South Africa, Zimbabwe was the next largest contributor, accounting for 2.0 % of the total arrivals with 14,357 visitors.
- USA and Botswana followed with 0.7% each, contributing 5,382 and 5,381 arrivals respectively.
- Collectively, the top ten source markets accounted for 96% percent of the total international arrivals to Lesotho.

Figure 5 reveals that:

- USA was the leading source market for Lesotho's overseas markets with 5,382 visitors demonstrating a strong interest among American tourists.
- India and Netherlands were the second and third largest overseas source markets with 4,653 and 4,644 arrivals respectively.
- China was the fourth largest source market with 4,160 visitors indicating a growing interest among the Chinese market.
- Germany was the fifth largest source market with 3,037 arrivals.
- As illustrated in figure 6, South Africa continued as the largest African source market with 657,480 arrivals.
- Zimbabwe and Botswana were the second and third largest source markets, each contributing 14,357 and 5,381 respectively.
- Eswatini and Malawi contributed smaller shares of international arrivals to Lesotho, possibly due to the long distance and less direct travel routes where each country contributed 3,472 and 1,914 arrivals respectively.

Figure 5: Top 5 Overseas source markets

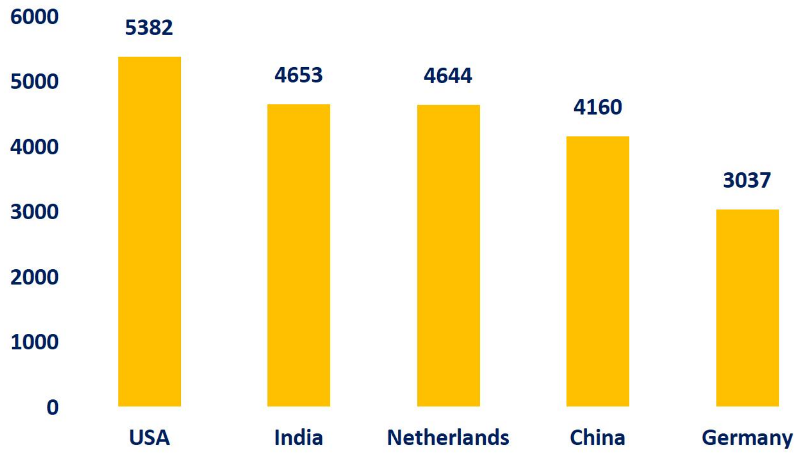


Figure 4: Top 5 African Source Markets - 2022

Figure 7: International by Continent

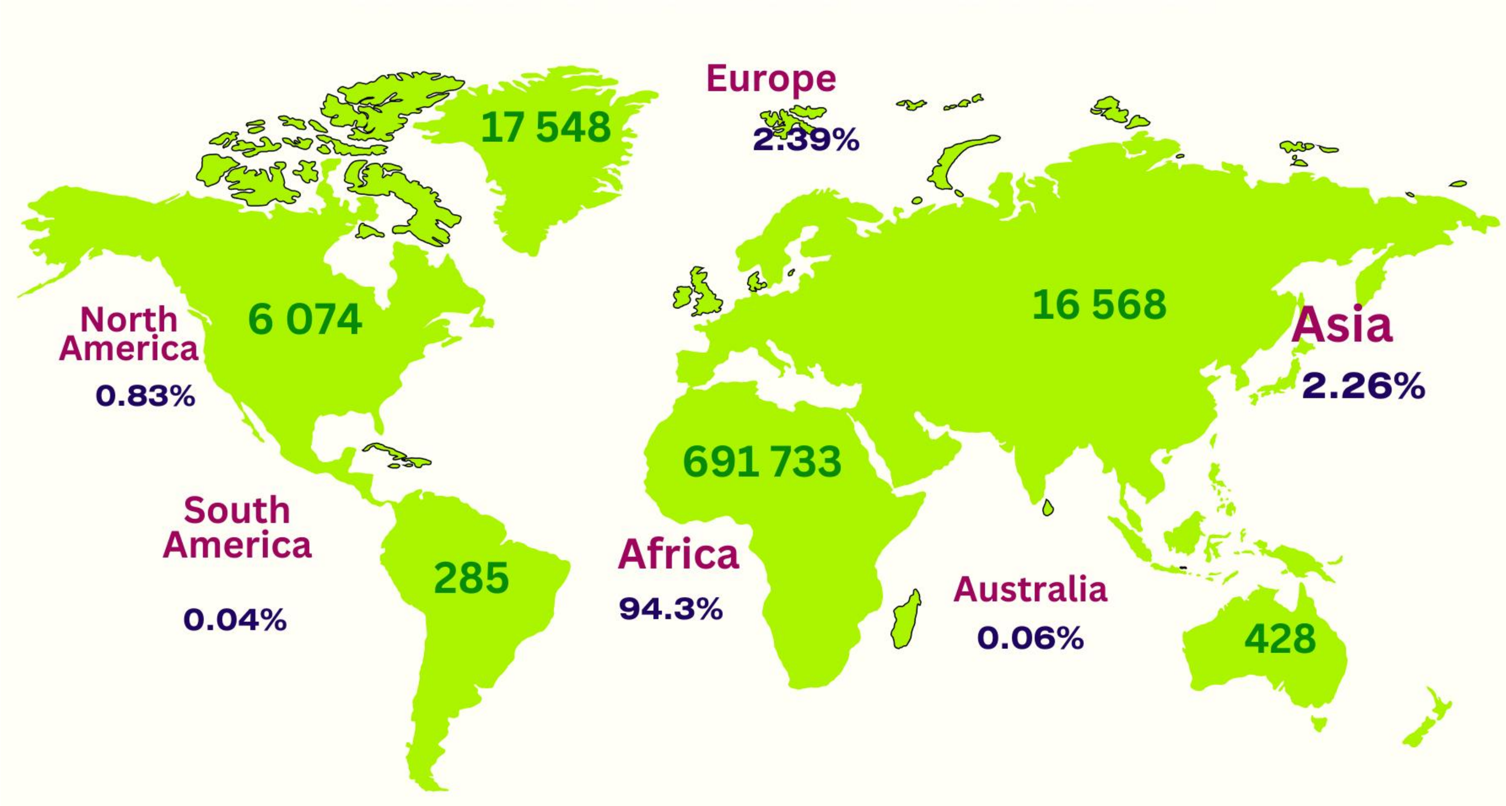


Figure 7 exhibits that:

- Africa was the predominant continent, contributing 94.3% (691,733 arrivals) of the total arrivals.
- Europe and Asia followed with 2.4% (17,548) arrivals and 2.7 % (16,568) arrivals respectively.
- North America accounted for 0.83% (6,074 arrivals).
- Australia and South America were the least contributors, accounting for 0.06% (428) arrivals and 0.04% (285) arrivals respectively.

INTERNATIONAL ARRIVALS BY MODE OF TRANSPORT AND PORT OF ENTRY

Figure 8:Percentage Distribution of Arrivals by mode of transport

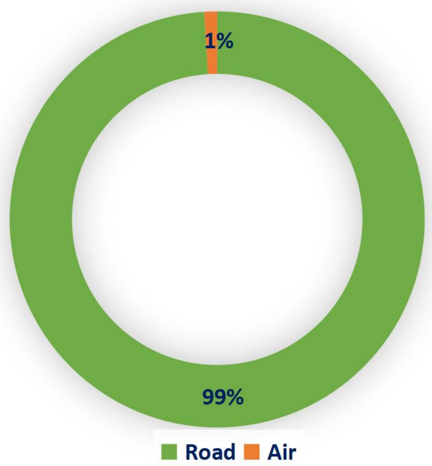


Figure 9: Arrivals by borders

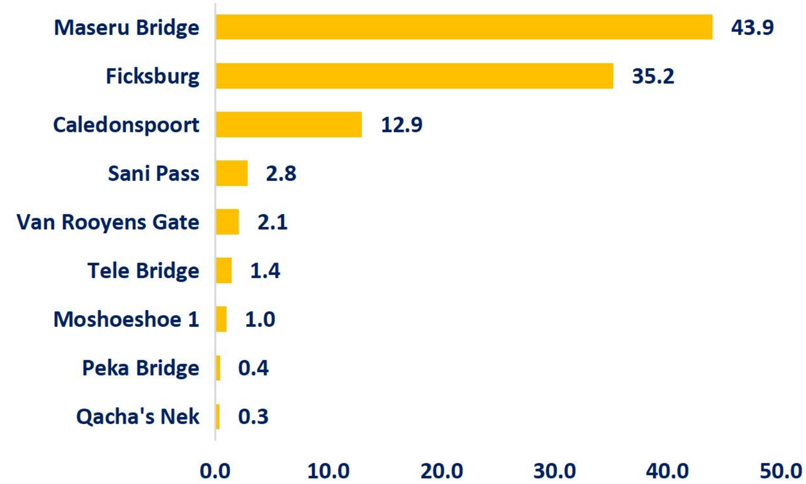
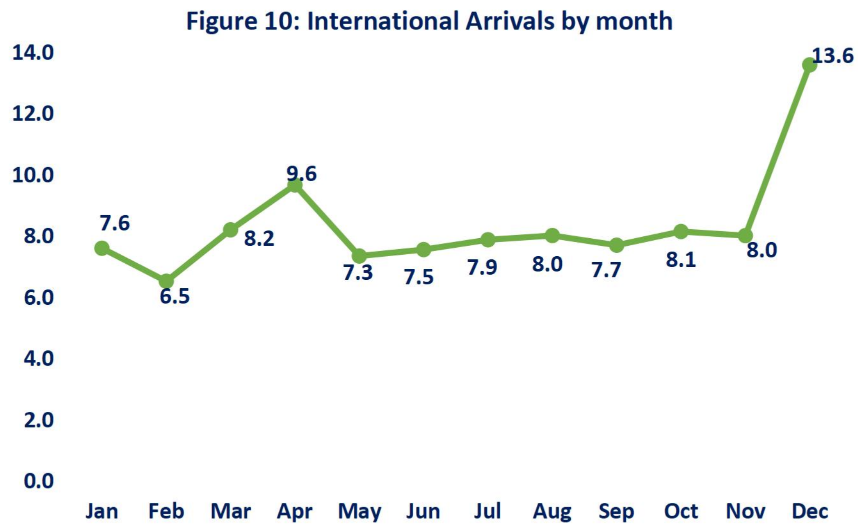


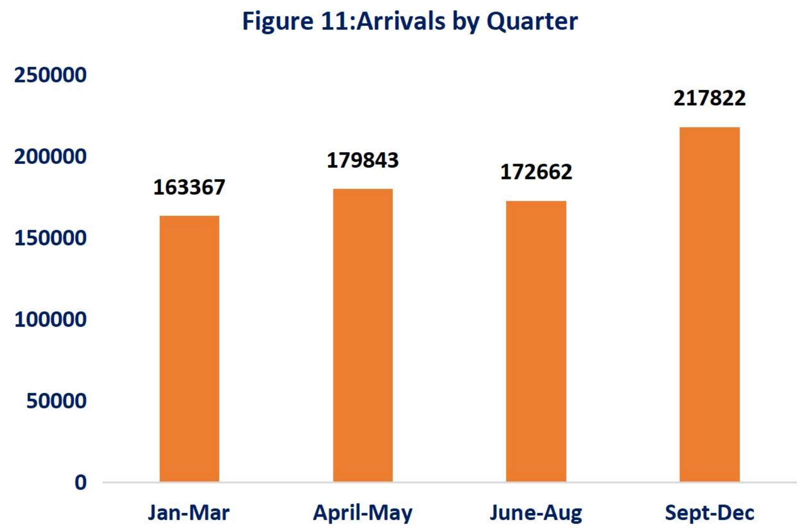
Figure 10 reveals that:

- Road transport was the dominant mode of transport for international arrivals to Lesotho, accounting for 99% of the total suggesting that most visitors preferred or found it more convenient to travel by road.
- Only 1% of international arrivals used air transport (Moshoeshoe I International Airport) indicating limited use of air travel to enter Lesotho.
- Lesotho is landlocked country bordered by South Africa, making road transport a convenient and cost-effective for visitors travelling from nearby countries.

Figure 9 displays that:

- Maseru Bridge was the most popular port of entry, with 322,440 arrivals, accounting for 44.4% of the total. Its proximity to the capital city, Maseru, makes it a crucial entry for both tourists and business travelers.
- Ficksburg and Caledonspoort were the second and third most frequented borders, with 257,918 arrivals (35.5%) and 94824(12.9%) respectively.These borders are popular possibly due to their strategic location and the fact that they are economic centers, providing convenient access for travelers.
- Sani Pass (2.9%) and Van Rooyens Gate (2.1%) were also frequented ports of entry but remained minor compared to the top three borders.





`

Figure 10 illustrates that:

- The highest percentage contribution of arrivals was observed in April (9.6%) and December (13.6 %) with 70,793 and 99,553 international arrivals therefore highlighting the attractiveness of Lesotho as a popular destination during the Easter and the Festive season.
- The lowest percentage contribution was observed in February with 6.5% contribution (47,710) indicating a slow start of the year for international arrivals.
- Generally international arrivals showed an increasing trend throughout the year. Arrivals were relatively lower in the early months (Jan-Feb) but increased steadily towards the middle of the year (Mar-Jun).
- Although there is a slight dip in May (7.3%), international arrivals followed by a consistent rise in the second half of the year, culminating in a peak in December.

Figure 11 shows that:

- The first quarter (Jan-Mar) saw 163,367 arrivals, contributing 22.3% to the annual total.
- The second quarter (April-June) experienced a slight increase (10.1%) with 179,843 arrivals, accounting for 24.5% possibly due to Easter and school holidays.
- The third quarter recorded 172,662 arrivals and a 4.0% decrease, showing a slight drop from April-May to June-August.
- The final quarter saw the highest influx and increase (26.2%) of visitors (possibly due to the festive season and year and holidays) where 217,822 arrivals were recorded, making up 29.7% of the total.

Accommodation Capacity, Demand Employment, Revenue & Services

The accommodation sub-sector is critical in tourism promotion and it is the most important indicator of the development of the sector. This section of the report presents analysis of accommodation demand and capacity as well as the performance of the sub-sector in terms of employment and revenue generation.

ACCOMMODATION CAPACITY

- 165 establishments were covered in the survey, representing 81.0% response rate.
- Slightly less than half of all facilities covered in the survey were guest houses. This pattern is in line with the fact that generally there are more Guest Houses than other types of establishments.
- The proportion of hotels, lodges and B&Bs covered were 11.5%, 14.5% and 17.0% respectively. Other types including conference centers, chalets, homestays and institutions made up 9.7%.

Figure 10: Distribution (%) of Accommodation Establishments Covered in the Survey - 2023

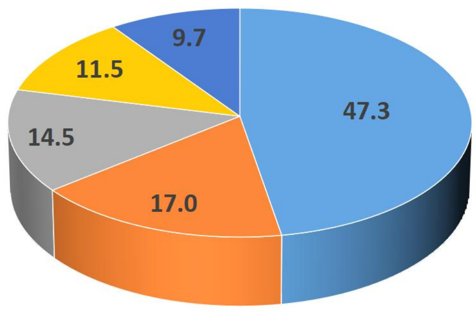


Figure 11: Number of accommdation Establishments by District - 2023

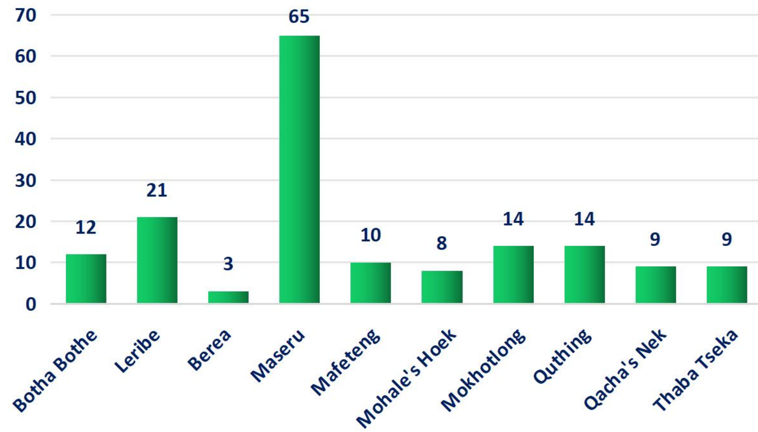


Figure 11 illustrates the distribution of establishments by district.

- By virtue of being the capital city, Maseru have more accommodation establishments, hence more (65) were covered from Maseru, making up 39.4% of all establishments across all districts.
- Significant numbers were also covered from Botha Bothe, Leribe, Mokhotlong, Mafeteng, and Quthing.

Figure 12 below illustrates district capacity in terms of rooms.

- Due to the majority of establishments being clustered in Maseru, Maseru had a higher room capacity.
- Maseru had more room capacity of 1461 rooms, representing 40.6% of total rooms.
- The rest of other districts had a room capacity rate of less than 10%.
- Relative to the analysis on the number of establishments in a district in figure 10, Figure 11 shows that even though Berea had the least number of establishments, it however had higher room capacity. This is because Berea has two fairly big hotels as opposed to other districts where there is only one or no hotels.
- Qacha's Nek had the lowest room capacity.

Figure 12: Number of Rooms by District - 2023

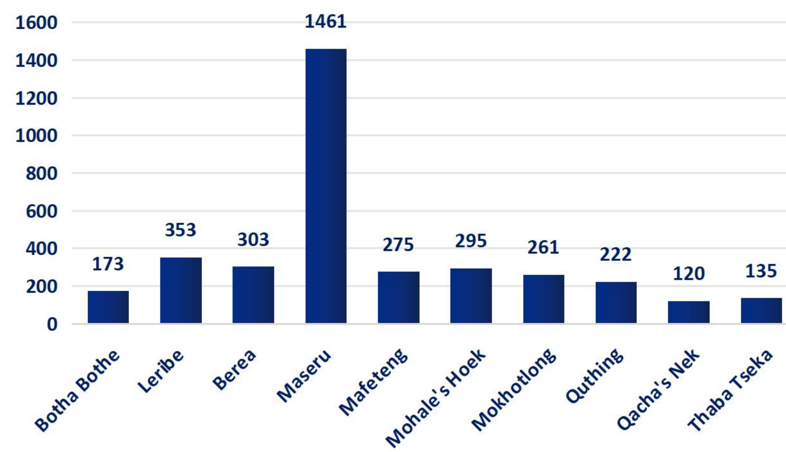
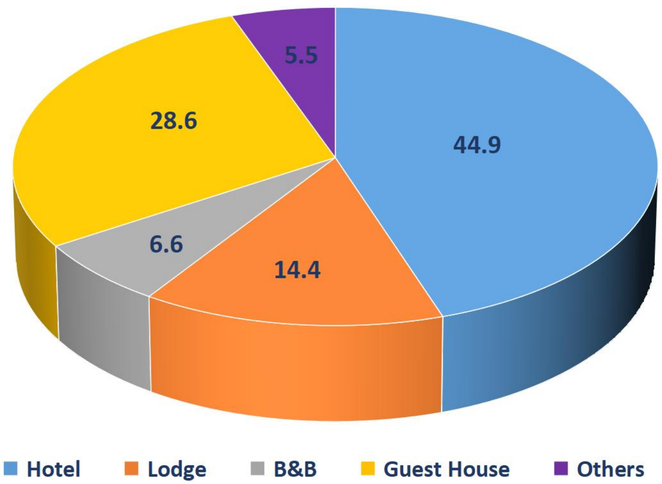


Figure 13: Distribution (%) of Rooms by Type of Establishment



Further analysis in Figure 13 depicts that:

- Hotels had the highest room capacity, 44.9%.
- Guest Houses ranked second with room capacity rate of 28.6%. Simply put, it implies that almost one third of the total number of rooms were from Guest houses.
- Other types of facilities accounted for only 5.5% of the total rooms.

Figure 14: Guest Nights (%) by Month - 2023

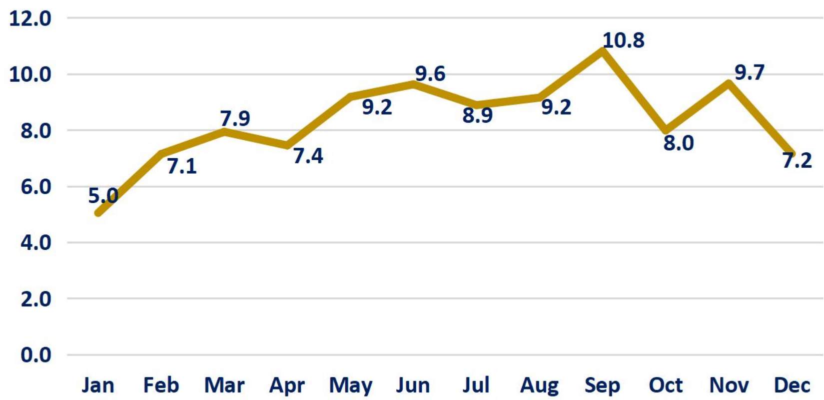
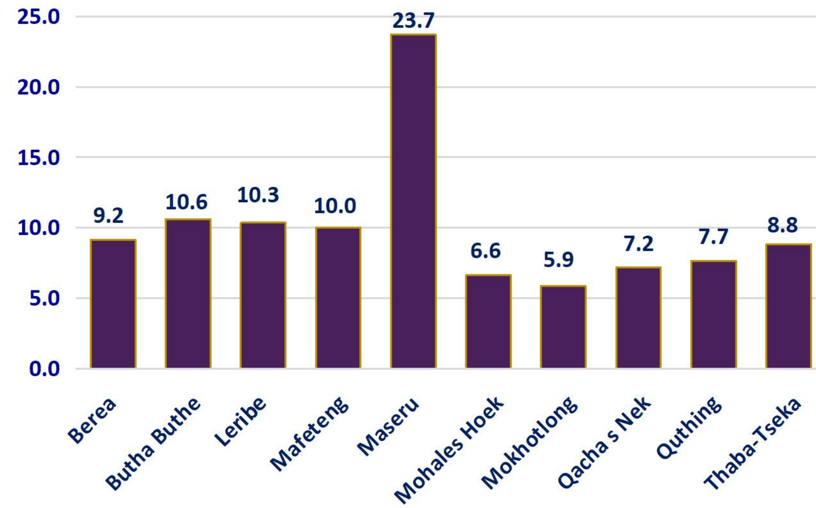


Figure 15: Guest Nights (%) by Districts - 2023



The pattern of demand for accommodation in 2023 is presented in figures 14, which indicates that:

- Demand for accommodation fluctuated across the year with demand peaking in the month of September, registering 10.8% (10.8% of the total number of guests who sought accommodation from all types of establishments in 2023.
- The lowest demand was observed in January, thereafter the demand increased moderately with drops in April, July, October and December.

Figure 15 further shows that:

- Maseru saw the highest demand for accommodation, registering 23.7% of total guests, followed by Botha Bothe Leribe, Mafeteng with 10.6%, 10.3% and 10.0% respectively. Mokhotlong registered the lowest number of guests, adding up to 5.9% of total guests.

Analysis by type of establishment in figure 16 below illustrates that:

- Hotels saw the highest demand of 39.3% of total guests. Guest houses registered second with 33.7% followed by lodges with 13.1% then by B&Bs with 6.7%.

Figure 16: Guest Nights (%) by Type of Establishment - 2023

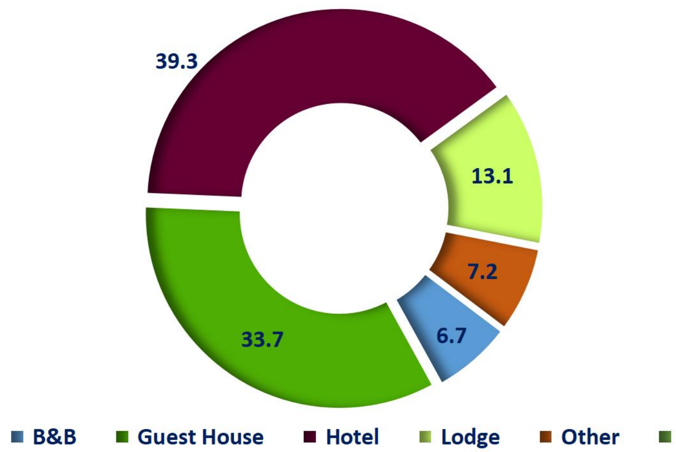


Figure 17: Number of Beds by Type of Establishment - 2023

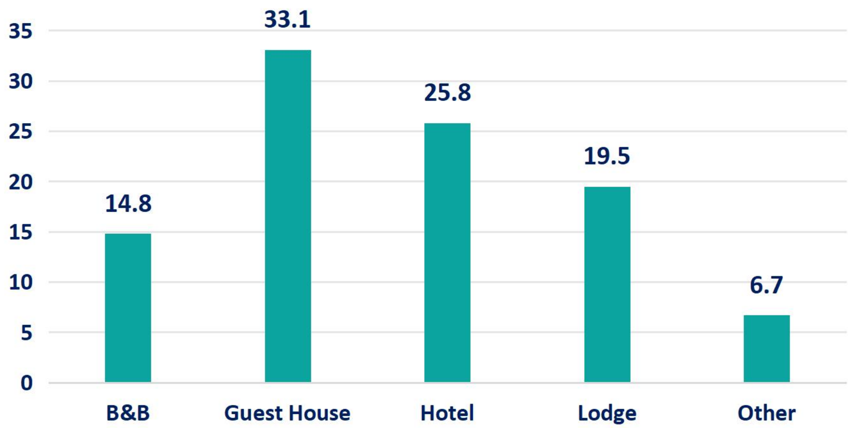


Figure 18: Bed Occupancy Rates by Type of Establishment - 2023

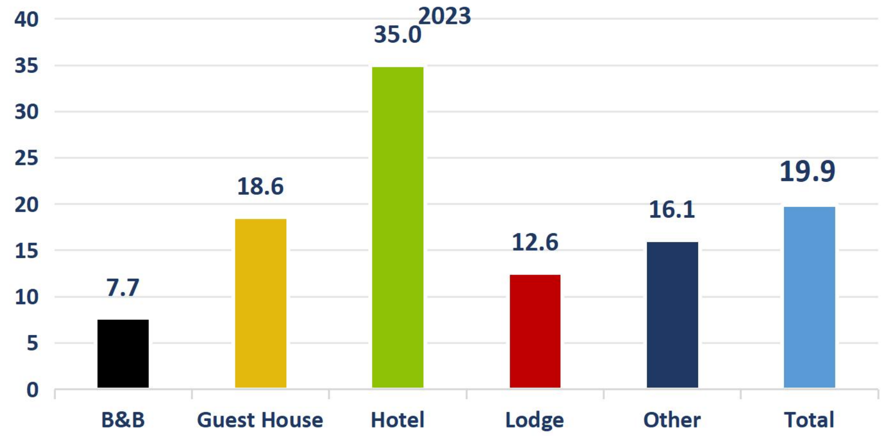


Illustration in figure 17shows that:

- The guest houses had more beds (33.1%) than other types of establishments followed by hotels with 25.8%, lodges with 19.5% then by B&Bs with 14.8% while the rest of Other types of facilities accounted for 6.7% of the total beds.

AT WHAT RATE WERE THE BEDS USED?

Figure 18 presents Bed occupancy rates by type of establishment. It indicates that:

- Hotel beds experienced the highest occupancy, registering bed occupancy rate of 35.0% followed by guest houses with 18.6%.
- Lodges and B&Bs saw rather lower occupancy, recording bed occupancy rates below 15%.
- The overall bed occupancy rate in 2023 was (19.9%) showing an increase of 1.6% as compared to 2022 which was 18.3%.

Figure 19: Bed Occupancy rates by District - 2023

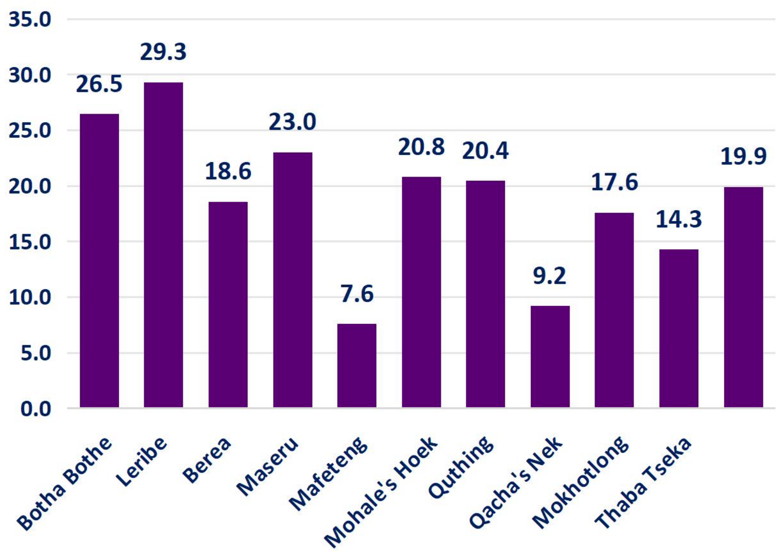
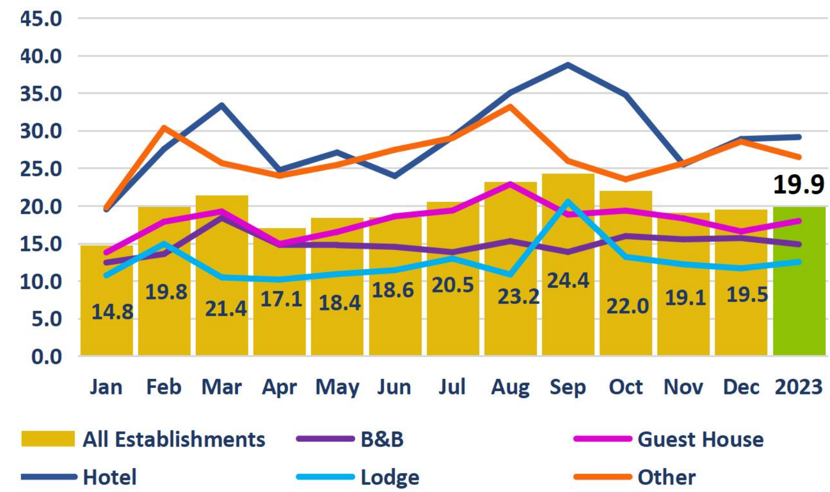


Figure 20: Bed Occupancy Rates by Month and Type of Establishments - 2023



Analysis by district in figure 19 depicts that:

- Leribe experience the highest bed occupancy.
- Botha Bothe registered second, followed by Maseru, Mohale's hoek and Quthing with bed occupancy rates of 26.5%, 23.0%, 20.8 and 20.4% respectively.
- Mafeteng saw the lowest bed demand of 7.6% while Thaba Tseka almost doubled, registering 14.3% compared to 7.4% in 2022.
- Mokhotlong and Berea bed occupancy were fairly good with 17.6% and 18.6% respectively while Qacha's nek registered the second lowest of 9.2%.

- The overall bed occupancy fluctuated across the months with peaks in February, March, June, August, September and December.
- The observed peaks can be attributed to Easter holidays, increased travel due to snow chasing, sectorial events which were largely clustered in the last four months of the year.
- Hotels experienced the highest (significantly higher than the total rates) bed occupancy rate throughout the year with fluctuations across the months. Notable hikes were observed in March, August, September and December.
- Guest Houses ranked second with a almost a similar trend across the months.

REVENUE ACCRUED FROM ACCOMMODATION SUB-SECTOR

Figure 21: % Share of Revenue Across Type of Establishment - 2023

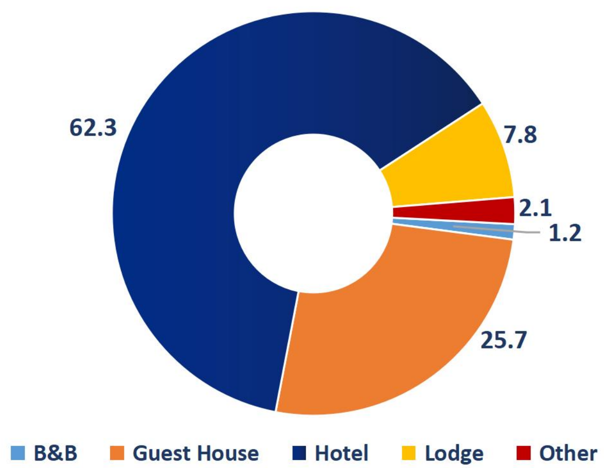


Figure 22: Revenue by Type of Residence and Spending - 2023

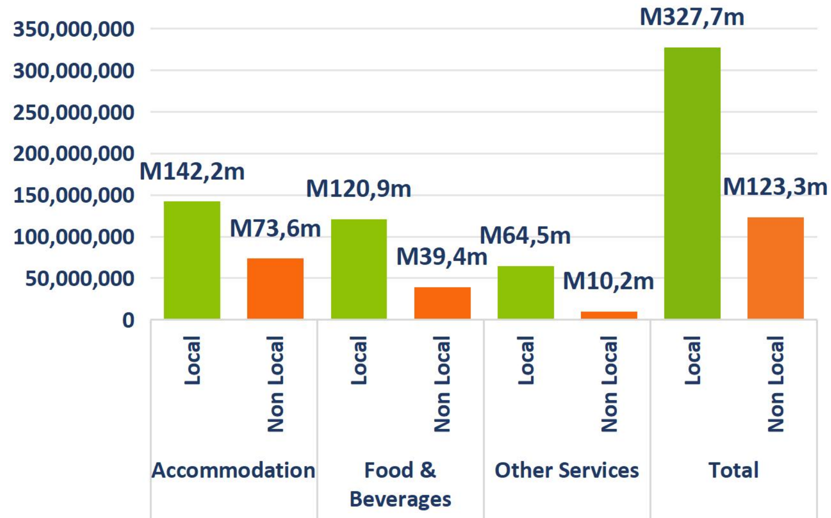


Figure 21 above shows that:

- The greater proportion of revenue (62.3%) was generated from hotels.
- 25.7% of the revenue was from Guest Houses and 7.8% from Lodges.
- Other types of accommodation establishments generated below 5% of the total revenue with B&Bs making only 1.2%.

Analysis of type of spending by residence in figure 23depicts that:

- Inbound tourists (Non-Locals) spent far less across all types of spending as compared to domestic travelers.
- On accommodation, revenue accrued from domestic travelers almost doubled that accrued from inbound tourists.
- Revenue from food & beverages was almost four times more for domestic travelers while revenue from the sale of other goods and services was 6 times higher for domestic travelers.

Figure 23: Revenue Accrued and Percentage Share by District - 2023

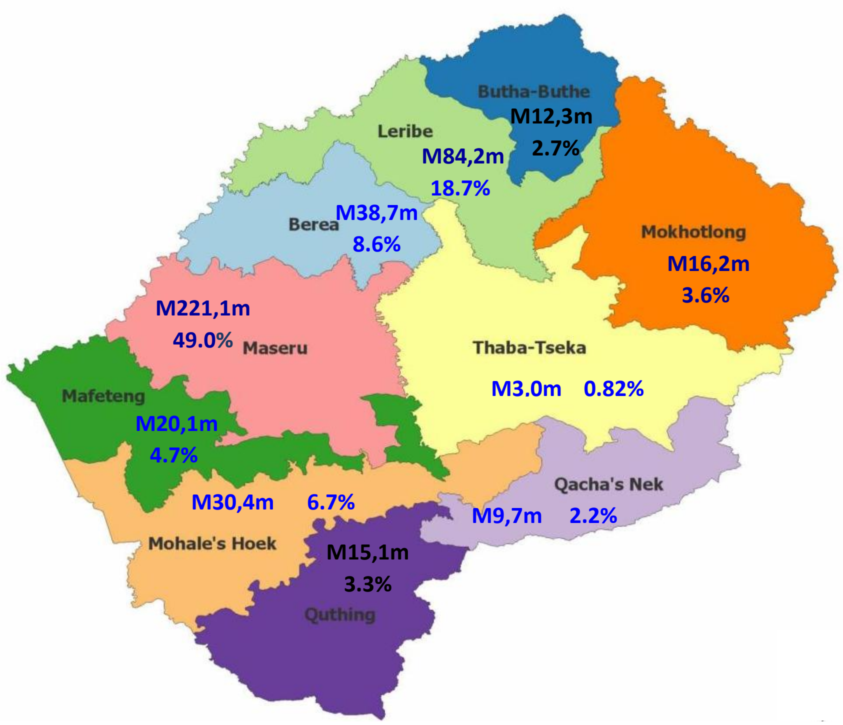


Figure 24: Revenue Accrued by Type of Spending and Years - 2022/2023

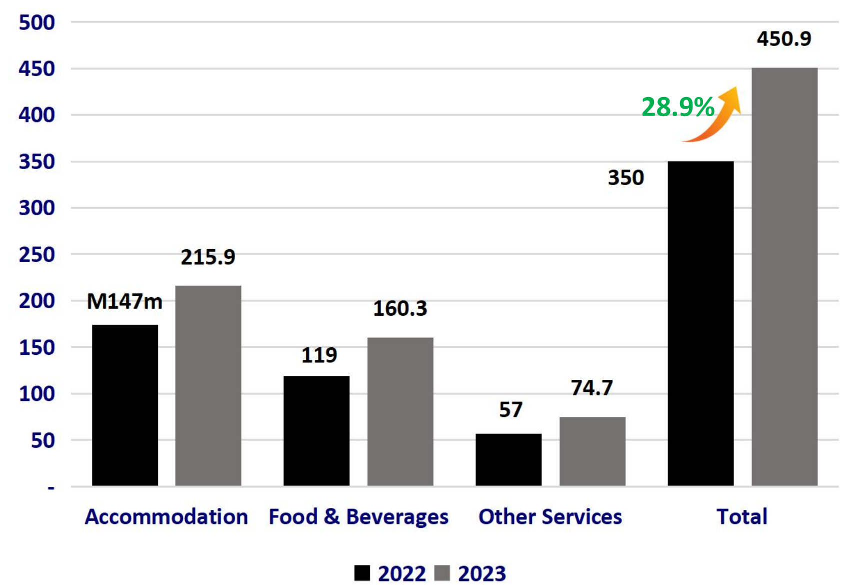


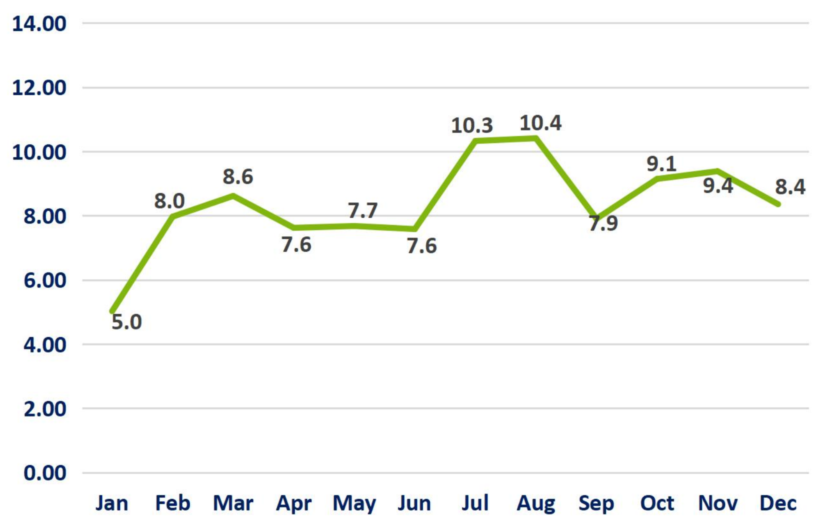
Figure 23 presents comparison of revenue accrued by districts, it shows that:

- 49.0% of the total revenue was generated in Maseru, followed by Leribe with 18.7%.
- Comparing revenue and bed occupancy across districts, the interesting observation is that Leribe and Botha Bothe had the highest bed occupancy rates but in terms of revenue, Maseru generated more revenue. This could be be because Maseru is the main city and more revenue could have been from other services such as food and beverages and conferencing services other than from accommodation.

Figure 24 presents the distribution of revenue accrued by type of spending, comparing 2022 and 2023.

- The highest proportion of revenue was accrued from accommodation, while other services generated less revenue, for both 2022 and 2023.
- Overall, revenue increased by 28.9% in 2023 as compared to 2022.

Figure 25: Revenue Accrued by Month - 2023



Analysis by month in figure 25 indicates that:

- In the first quarter of the year, revenue reached peak in March, thereafter decreased and fluctuated below the March mark. An sharp increase was observed in July, followed by a slight increase in August and a dip in September. A notable increase was observed in October until November, followed by a drop in December.
- Easter Holidays, March final (end and fiscal year), snow chasing and major industry events were the main contributors for the observed pattern.

EMPLOYMENT

- The total number of employees in the accommodation sector was 1887 in 2023, representing a 16.2% decline as compared to 2022.
- Women made up the majority (61.3%) of the workforce in the accommodation sector as shown in figure 26.

According to analysis by districts in figure 27,

- As expected because Maseru has more establishments, the majority (44.3%) of employees were in Maseru.
- Leribe and Mokhotlong recorded notable numbers of employees.
- Thaba Tseka had the least number of employees.

Figure 26: Proportion of Employees by Sex - 2023

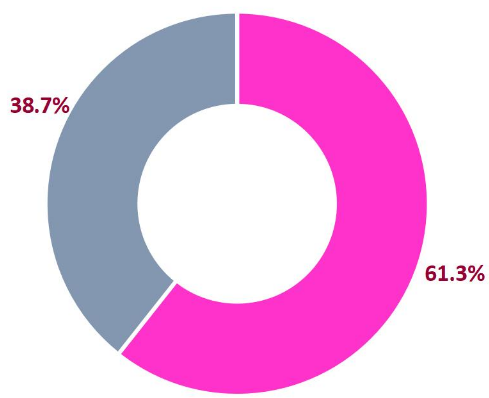
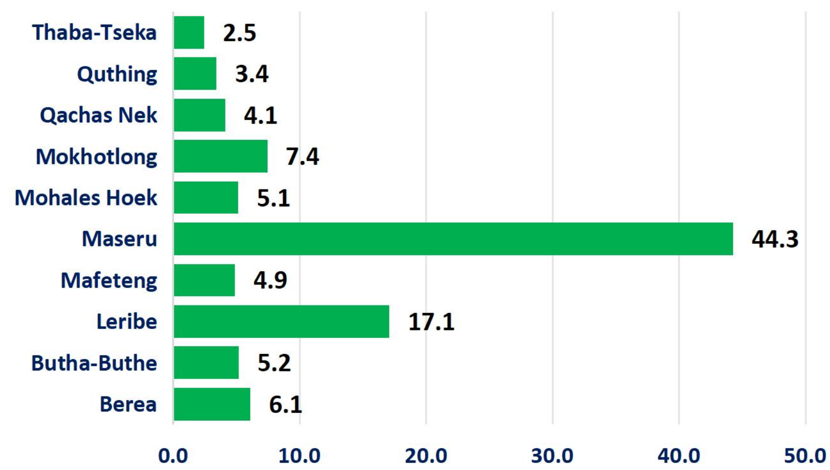
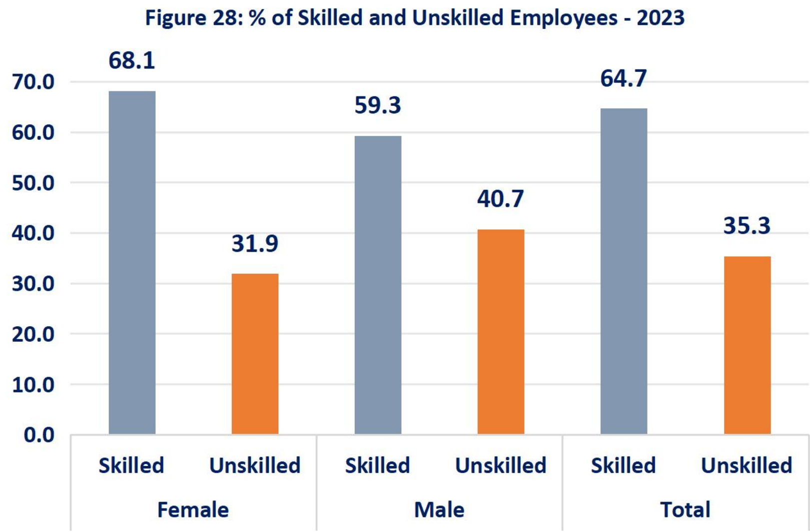
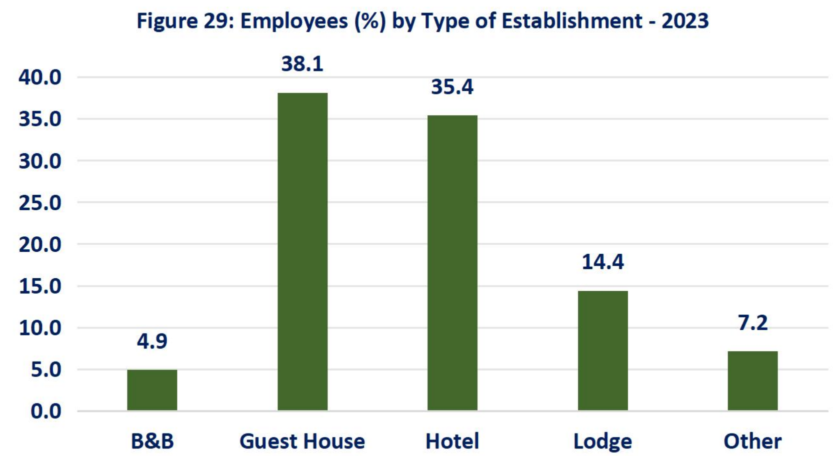


Figure 27: Distribution (%) of Employees by Districtc - 2023







- Figure 28 depicts that, the accommodation sector in Lesotho employed skilled labor with the workforce of 64.7% being skilled and 35.3% being unskilled.
- Comparison by sex indicates that of the skilled workforce, the majority are females (68.1% females compared with 59.3% males)
- Analysis illustrated in figure 39 shows that, the larger number (38.1%) of workers were employed by guest houses, followed by hotel with 35.4%, lodges 14.4%, Other types 7.2% and B&B's with 4.9% respectively.
- The hotels and guest houses have switched positions as compared to 2022 and the same is observed for B&Bs and Other types.
- The observed pattern of distribution of workers across types of establishment is in sync with analysis of stocks of establishments, guest nights and bed occupancy which were rather high in hotels, guest houses, lodges and B&Bs in that order, implying the portrayed (in figure 29) labour demand.

COMPARISON OF KEY VARIABLES OVER THE YEARS - 2017 -2023

Figure 30: Number of Employees in the Accommodation Sub-Sector 2017 - 2023

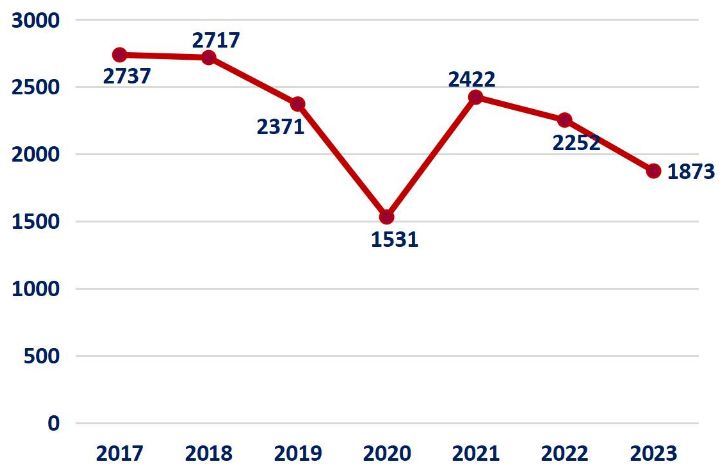


Figure 31: Number of Rooms in the Accommodation Sub-Sector 2017 - 2023

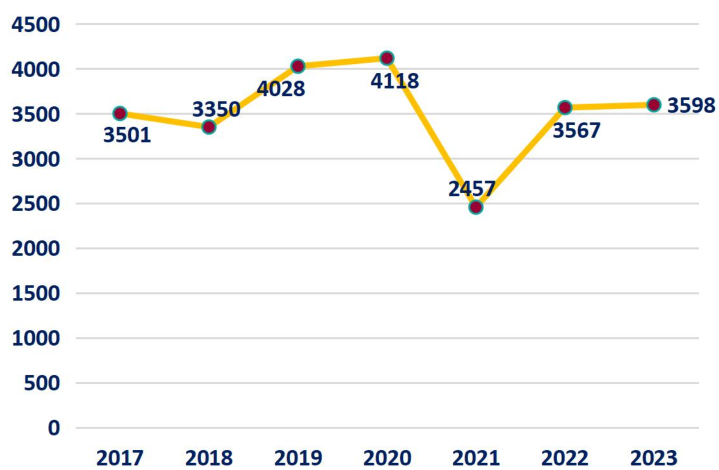
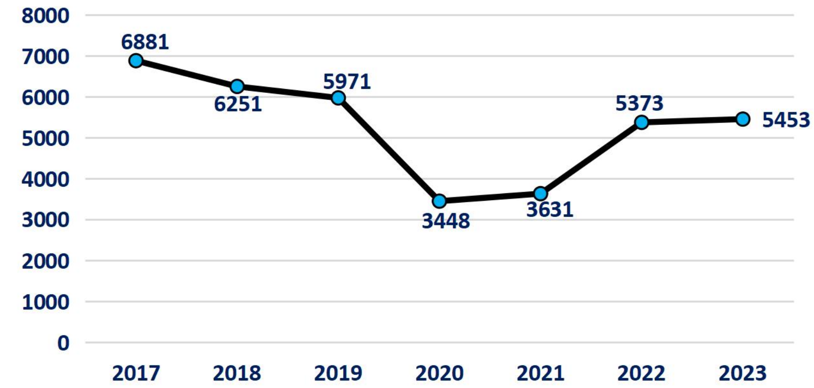


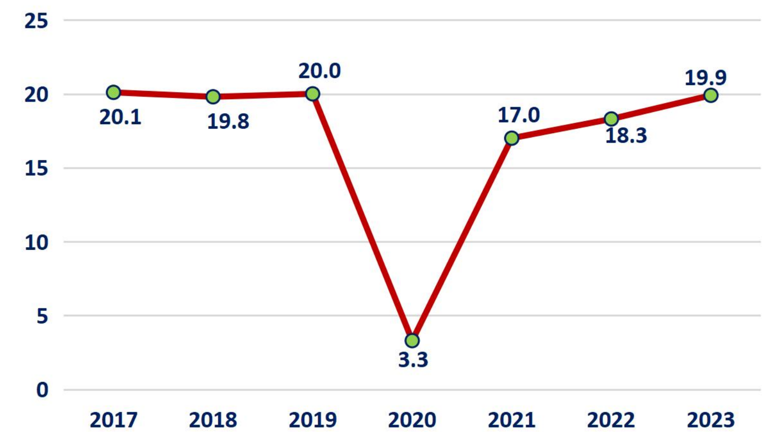
Figure 32: Number of Beds 2017 - 2023



- Figure 30 indicates that employees in the accommodation sub-sector have been decreasing slightly since 2018. Not focusing on 2020 where the records were distorted due to COVID-19, a slight increase was recorded between 2019 and 2021, followed by a decline in 2022 and 2023.
- The number of employees in 2023 stood below the recorded number before the pandemic. This is worrying since the number of establishments are increasing, where one could expect the increase in employees as well. The pattern could also imply that the accommodation sector probably depends highly on seasonal workers.
- The number of rooms declined between 2019 and 2022 and slightly increased in 2023 as shown in figure 31. This maybe a sign that the industry is recovering.
- The number of beds in figure 32 is in sync with the number of rooms, portraying a slight increase in 2023.

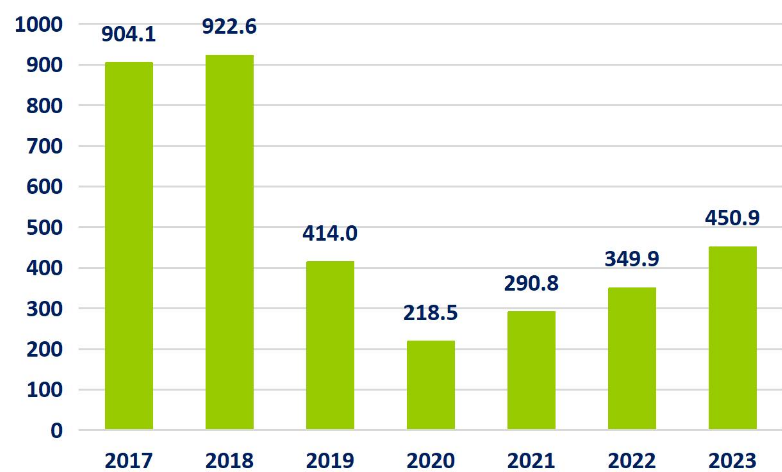
- Illustration of Bed occupancy in figure 33 indicates that over the seven-year period, 2017 saw the highest demand for accommodation with 20.1% bed occupancy rate. A 3.0% decline was observed between the pre-pandemic and post-pandemic eras, followed by a slight upward trend between 2021 and 2023, where the bed occupancy stood at 19.9%.

Figure 33: Yearly Bed Occupancy Rates 2017 - 2023



- During the same reference period, the highest revenue was recorded in 2018, after which there was a drop until 2020.
- Since 2021 the revenue has been moderately increasing with 2023 registering M450.9m, implying slow recovery of the industry.

Figure 34: Revenue Accrued 2017 -2023



CONCLUSION

An overview of the report exhibits that although Lesotho's international arrivals were undoubtedly crumpled by the COVID 19 pandemic, there is a notable a resurgence of the Lesotho's tourism Industry. Figures suggest that in-terms of international arrivals, Lesotho reach a 64% mark of the arrivals before the pandemic, and an encouraging 26.2% increase as compared to 2022.

Analysis of tourists by country of residence, denotes that South Africa remained the the major source market, registering 89.6% of the total international arrivals to Lesotho. The report further indicates that, unlike in the past where United Kingdom used to the one of the leading source market internationally, it is relegated to the lowest ranking while USA is leading and Netherlands is picking up. Interestingly, India and and china seem to be upcoming source markets with considerable number of arrivals recorded from each.

The report also indicates a notable growth in revenue accrued in the accommodation sector, reaching M450.9m in 2023, coupled with an increased Bed occupancy to 19.9% compared with 18.3% in 2022.

The results also display that women made up the majority (61.3%) of the workforce in the accommodation sector as compared to males who accounted for 38.7% of the total workforce. Encouraging as well is the the notion that the majority of the workforce within the sector is skilled, which translates to quality services and product offering. On capacity of the accommodation sector, the reports indicates some growth of 0.9% and 1.5% in the number of rooms and beds respectively.

In conclusion, while economic landscape continues to be challenging by way of unstable inflation, fluctuating energy prices and climate change issues, Lesotho is slowly regaining the travelers confidence.

It is also evident that our marketing efforts and strategies have to be reconfigured to incorporate the upcoming markets. The product development as well needs to be reconsidered to address the needs of all tourist including those from the new significant markets. This can be achievable by close collaboration with the government, private sector and all stakeholders.

EXPLANATORY NOTES

Introduction

This publication presents data from the monthly International arrivals records and Accommodation Surveys. The International Arrivals Records covers all international non-resident visitors that enter Lesotho from different parts of the world.

Under normal circumstances, data is collected by the Department of Immigration Lesotho in collaboration with LTDC, through the use of visitor arrivals forms filled by visitors upon arrival at ports of entry. However, in the advent of limited resources, data was not efficiently collected due to shortage of forms and inefficient data capturing systems installed by immigration at major ports of entry. This necessitated the establishment of an MOU between LTDC and Statistics South Africa (Stats SA), where LTDC gets secondary data from Stats SA on account of the fact that, data on departures to Lesotho from South Africa are data on arrivals to Lesotho. Other supplementary data is collected on monthly basis from ports of entry that are not covered by Stats SA.

The Monthly Accommodation Surveys covers all licensed accommodation establishments across the country. Data is collected through the use of a structured form which is filled by the establishment on monthly basis and collected by LTDC officials physically and through electronic facilities. Data is collected from all types of accommodation establishments and covers data on revenue accrued, residence status of guests, type of spending and the number of:

- rooms,
- guests,
- beds,
- employees

Data quality

The two surveys does not have a sample component and the data are not subject to sampling variability. However, other inaccuracies collectively referred to as non-sampling error may affect the data. These non-sampling errors may arise from a number of sources, including errors in:

- the reporting of data by providers,
- data capturing and processing.
- definition and classification and
- incomplete coverage.

It is imperative to mention that, every effort has been made to reduce non-sampling error to a minimum by careful design and testing of questionnaires, and efficient operating procedures and systems used to compile statistics.

Response rates

The quality and reliability of survey data can be affected by the degree of response to a survey however, it is rare to achieve a 100% response rate for any survey. The response rate for the Accommodation survey in 2022 was 80.0%. On the other hand, while we may not indicate the response rate for International arrivals data, we are confident that the response rate was reasonably significant since the South African Immigration data capturing systems are reliable and that is the source of data for Stats SA.

Confidentiality of data

A number of techniques are used to ensure that respondents' identification is not disclosed, including aggregation of information. On the Monthly Accommodation Survey, confidentiality is ensured through the use of computerized data capturing system which sores all the accommodation statistics datasets in a database that is protected by passwords and is not accessible to every employee at

LTDC. The data is also suppressed to ensure that individual establishments cannot be identified easily. On international arrivals data, confidentiality is also ensured because the data is also captured and stored electronically and is also protected in terms of access. The data is also published in aggregates. In any circumstances, data that is not aggregated may not be shared to third parties.

Glossary

Definitions of all concepts in this report have been derived from the UNWTO International Recommendations for Tourism Statistics 2008 manual.

A visitor: a traveller taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited.

International Arrivals: All visitors arriving to Lesotho from other countries of the world and are not permanent residents in Lesotho or have not stayed in Lesotho for a period exceeding one year.

Source Markets: Countries from which the majority of visitors come from as their country of residence.

Accommodation Establishment: any facility that regularly or occasionally provides short-term accommodation and other hospitality services for tourists/visitors as a paid service.

Domestic Visitors: all residents who travel within the country. Any activities engaged in by visitors who are residents of Lesotho are referred to as domestic tourism.

Inbound visitors: visitors who come to Lesotho from other countries. Any activities engaged in by visitors who come to Lesotho are referred to as inbound tourism.

Outbound Visitors: residents of Lesotho who travel to other countries.

Bed Space: number of spaces for persons who can stay overnight in the beds set up in the establishment, ignoring any extra beds that may be set up upon customer request. The term bed space applies to a single bed; a double bed is counted as two bed spaces. The unit serves to measure the capacity of any type of accommodation.

Rooms: rooms that an establishment usually has available to accommodate guests (overnight visitors), excluding rooms used by non-tourists (e.g. the employees working for the establishment). If a room is used as a permanent residence (for more than a year) it should not be included either. Bathrooms and toilets do not count as rooms.

Guest Night: A night spent (or overnight stay) is each night a guest / tourist (resident or non-resident) actually spends (sleeps or stays) in a tourist accommodation establishment or non-rented accommodation. Normally the date of arrival is different from the date of departure but persons arriving after midnight and leaving on the same day are included in overnight stays.

Bed Occupancy Rate: it is obtained by dividing the total number of overnight stays/beds used during the reference period by the number of the bed spaces on offer (excluding extra beds) and the number of days when the bed places are actually available for use (excluding seasonal closures and other temporary closures for decoration, by police order, etc.) during the reference period. The result is multiplied by 100 to express the occupancy rate- as a percentage.

Formula:

$$\text{Bed Occupancy Rate} = \frac{\text{Beds Used}}{\text{Beds Spaces}} \times 100$$

$$\text{Bed Spaces} = \sum_{i=1}^{n} \text{Bed Days Available}$$

(the number of days during which bed i (excluding extra beds) is available in the reference period)

n = the total number of beds in an establishment, excluding extra beds

Employment in Accommodation: refers to all the jobs (or persons engaged) for providing tourism-characteristic and non-tourism-characteristic services in all types of accommodation establishments.

Annex

Gender	Arrivals	%
F	275731	37.6
M	457963	62.4
Total	**733694**	**100**

						% Increase			
Year	**2019**	**2020**	**2021**	**2022**	**2023**	**19/20**	**20/21**	**21/22**	**22/23**
Arrivals	1142381	331421	278641	541134	733694	-71.0	-15.9	94.2	35.6

Country	Rank 2022	Arrivals 2022	Country	Rank	Arrivals 2023
South Africa	1	489,780	South Africa	1	657480
Zimbabwe	2	9,436	Zimbabwe	2	14357
India	3	3,892	USA	3	5382
USA	4	3,639	Botswana	4	5381
Botswana	5	3,166	India	5	4653
China	6	3,122	Netherlands	6	4644
UK	7	2,218	China	7	4160
Taiwan	8	2,023	Eswatini	8	3472
Netherlands	9	1,775	22	323	449.5
Eswatini	10	1,750	8	962	81.9
Total		**541,134**		**278,641**	

Continent	2022	% Contribution	2023	% Contribution
Africa	512069	94.6	691733	94.3
Europe	10002	1.8	17548	2.4
Asia	13650	2.5	16568	2.3
North America	3970	0.7	6074	0.8
Unknown	979	0.2	1058	0.1
Australasia	250	0.0	428	0.1
South America	214	0.0	285	0.0
Total	**541134**	**100**	**733694**	**100**

Month	No. of Arrivals	% Change
January	55622	7.6
February	47710	6.5
March	60035	8.2
April	70793	9.6
May	53753	7.3
June	55297	7.5
July	57651	7.9
August	58663	8.0
September	56348	7.7
October	59626	8.1
November	58643	8.0
December	99553	13.6
Total	**733694**	

Bed Occupancy Rates by Month – 2022 ((Beds Used /Beds Spaces) x 100)						
Month	**B&B**	**Guest House**	**Hotel**	**Lodge**	**Other**	**All Establishments**
January	12.44	13.79	19.52	10.74	19.76	14.80
February	13.59	17.87	27.55	14.92	30.35	19.84
March	18.38	19.23	33.35	10.47	25.68	21.39
April	14.80	14.92	24.74	10.18	23.99	17.10
May	14.75	16.52	27.09	10.91	25.44	18.39
June	14.53	18.59	23.95	11.43	27.45	18.55
July	13.82	19.37	29.16	12.97	29.01	20.53
August	15.29	22.86	35.03	10.85	33.16	23.25
September	13.85	18.82	38.73	20.51	25.96	24.36
October	15.96	19.36	34.74	13.20	23.52	22.02
November	15.53	18.32	25.50	12.21	25.64	19.14
December	15.70	16.58	28.87	11.68	28.53	19.53
Average	14.87	17.98	29.14	12.52	26.47	19.91

Number of Rooms by District and type of Establishment - 2023						
District	**Hotel**	**Lodge**	**B&B**	**Guest House**	**Others**	**Total**
Berea	324	0	5	24	0	353
Butha-Buthe	70	65	10	28	0	173
Leribe	124	0	37	129	13	303
Mafeteng	121	132	0	42	0	295
Maseru	676	209	121	407	48	1461
Mohales Hoek	44	35	0	136	60	275
Mokhotlong	138	10	12	99	2	261
Qachas Nek	118	32	6	43	23	222
Quthing	0	0	3	76	41	120
Thaba-Tseka	0	35	44	45	11	135
Total	**1615**	**518**	**238**	**1029**	**198**	**3598**

Number of Guests - 2023 (Residents)						
District	B&B	Guest House	Hotel	Lodge	Other	Total
Berea	43	570	20965	0	0	21578
Butha-Buthe	881	4741	1662	2412	36	9732
Leribe	2256	14962	2536	5243	2161	27158
Mafeteng	156	5218	1313	878	0	7565
Maseru	3458	25448	12238	10503	1290	52937
Mohales Hoek	60	2327	11352	805	5259	19803
Mokhotlong	331	10440	965	87	3260	15083
Qachas Nek	366	2615	6474	0	2916	12371
Quthing	549	11104	3118	0	953	15724
Thaba-Tseka	753	2426	0	0	696	3875
Total	**8853**	**79851**	**60623**	**19928**	**16571**	**185826**

Number of Guests - 2023 (Non-Residents)						
District	B&B	Guest House	Hotel	Lodge	Other	Total
Berea	965	1197	0	0	0	2162
Butha-Buthe	2534	3511	16341	5183	1773	29342
Leribe	2087	4002	0	3585	1297	10971
Mafeteng	965	2184	37765	7540	873	49327
Maseru	3229	24950	1898	3142	1273	34492
Mohales Hoek	971	1178	1004	1447	0	4600
Mokhotlong	1165	2489	0	1946	873	6473
Qachas Nek	1936	2419	5194	2754	1829	14132
Quthing	996	1069	-2153	1543	1016	2471
Thaba-Tseka	1015	1248	24257	1221	876	28617
Total	**15863**	**44247**	**84306**	**28361**	**9810**	**182587**

Number of Guests - 2023 (Total)						
District	**B&B**	**Guest House**	**Hotel**	**Lodge**	**Other**	**Total**
Berea	1008	1767	20965	0	0	23740
Butha-Buthe	3415	8252	18003	7595	1809	39074
Leribe	4343	18964	2536	8828	3458	38129
Mafeteng	1121	7402	39078	8418	873	56892
Maseru	6687	50398	14136	13645	2563	87429
Mohales Hoek	1031	3505	12356	2252	5259	24403
Mokhotlong	1496	12929	965	2033	4133	21556
Qachas Nek	2302	5034	11668	2754	4745	26503
Quthing	1545	12173	965	1543	1969	18195
Thaba-Tseka	1768	3674	24257	1221	1572	32492
Total	**24716**	**124098**	**144929**	**48289**	**26381**	**368413**

Number of Beds by District and Type of Establishment - 2023						
District	**B&B**	**Guest House**	**Hotel**	**Lodge**	**Others**	**Total**
Berea	1	31	512	0	0	544
Butha-Buthe	23	103	32	82	7	247
Leribe	39	214	125	65	16	459
Mafeteng	54	185	55	234	0	528
Maseru	514	512	392	591	89	2098
Mohales Hoek	1	92	76	20	91	281
Mokhotlong	103	198	105	71	12	489
Qachas Nek	36	177	75	0	56	344
Quthing	7	225	37	0	49	318
Thaba-Tseka	27	71	0	0	48	145
Total	**805**	**1808**	**1410**	**1063**	**367**	**5453**

Number of Beds used by District - 2023						
District	**B&B**	**Guest House**	**Hotel**	**Lodge**	**Others**	**Total**
Berea	140	1,607	35,124	0	0	36,871
Butha-Buthe	3,276	6,907	4,048	9,563	61	23,855
Leribe	3,689	18,234	16,357	8,352	2,482	49,114
Mafeteng	109	6,205	1,340	6,944	0	14,598
Maseru	9,416	54,960	88,576	21,715	1,641	176,308
Mohales Hoek	53	2,323	12,805	814	5,339	21,334
Mokhotlong	1,322	12,705	11,641	1,480	4,260	31,408

Qachas Nek	375	2,766	5,342	0	3,057	11,540
Quthing	2,534	13,015	5,115	0	3,063	23,727
Thaba-Tseka	1,768	4,121	0	0	1,688	7,577
Total	**22,682**	**122,843**	**180,348**	**48,868**	**21,591**	**396,332**

Number of Beds used by Month - 2023						
Month	**B&B**	**Guest House**	**Hotel**	**Lodge**	**Others**	**Total**
January	3,224	8,102	8,263	3,490	2,092	25,171
February	3,471	10,177	11,867	4,738	2,769	33,022
March	4,563	10,882	14,240	3,438	2,718	35,841
April	3,565	8,115	10,386	3,269	2,627	27,962
May	3,608	9,285	11,073	3,584	3,064	30,614
June	3,501	9,976	9,966	3,754	3,206	30,403
July	3,330	11,168	12,667	4,309	3,600	35,074
August	3,906	11,930	15,473	3,485	3,389	38,183
September	3,489	9,893	17,812	6,814	3,600	41,608
October	3,671	10,385	15,090	4,287	2,575	36,008
November	3,628	10,097	10,888	3,787	2,901	31,301
December	3,726	8,656	12,224	3,623	2,916	31,145

Total	43,682	118,666	149,949	48,578	35,457	396,332

Number of Bed Spaces by Month – 2023 (beds available x days available)						
Month	**B&B**	**Guest House**	**Hotel**	**Lodge**	**Other**	**Total**
January	25915	58765	42340	32485	10585	170090
February	25550	56940	43070	31755	9125	166440
March	24820	56575	42705	32850	10585	167535
April	24090	54385	41975	32120	10950	163520
May	24455	56210	40880	32850	12045	166440
June	24090	53655	41610	32850	11680	163885
July	24090	57670	43435	33215	12410	170820
August	25550	52195	44165	32120	10220	164250
September	25185	52560	45990	33215	13870	170820
October	22995	53655	43435	32485	10950	163520
November	23360	55115	42705	31025	11315	163520
December	23725	52195	42340	31025	10220	159505

Number of Bed Spaces by District - 2023						
District	**B&B**	**Guest House**	**Hotel**	**Lodge**	**Others**	**Total**
Berea	243	11315	186880	0	0	198438
Butha-Buthe	8486	37504	11710	29930	2555	90185
Leribe	14235	78110	45716	23725	5840	167626
Mafeteng	19710	67525	20075	85410	0	192720

Maseru	187610	186880	143080	215715	32485	765770
Mohales Hoek	487	33580	27740	7452	33306	102565
Mokhotlong	37595	72270	38264	25915	4258	178303
Qachas Nek	13140	64605	27375	0	20318	125438
Quthing	2373	82155	13627	0	17885	116040
Thaba-Tseka	9825	25854	0	0	17398	53077

Revenue by District and Type of Spending (in Million Maloti) - 2023

Month	Accommodation		Food & Beverages		Other Goods & Services		Total
	Residents	Non-Residents	Residents	Non-Residents	Residents	Non-Residents	
Berea	17,783,507	643,324.78	18,707,252.50	323,117.00	1,207,238.00	0	38,664,439
Butha-Buthe	5,639,642	2,157,713.00	3,159,440.65	898,537.50	398,581.00	90791	12,344,705
Leribe	29,632,542	5,374,838.22	31,585,809.85	3,439,663.01	13,997,606.81	124888.16	84,155,348
Mafeteng	9,798,849	2,949,920.15	3,601,683.15	2,500,774.53	392,947.00	914494	20,158,668
Maseru	38,166,221	60,005,990.86	38,860,464.84	30,322,826.96	44,714,983.18	8999765.98	221,070,253
Mohales Hoek	15,084,845	733,282.09	9,692,487.23	1,371,113.88	3,382,007.16	92106.2	30,355,842
Mokhotlong	10,406,968	1,435,437.06	3,916,301.47	399,517.75	81,398.00	9655	16,249,278
Qachas Nek	6,318,012	109,469.00	3,341,272.00	65,342.00	31,888.00	90	9,866,073
Quthing	8,096,570	103,350.00	6,610,661.48	11,920.00	225,344.35	0	15,047,846
Thaba-Tseka	1,307,626	122,930.00	1,409,896.00	70,858.00	109,666.00	820	3,021,796
2023	**142,234,782**	**73,636,255.16**	**120,885,269.17**	**39,403,670.63**	**64,541,659.50**	**10,232,610.34**	**450,934,246**

Employment by District 2017 - 2023							
District	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**
Berea	144	139	149	74	184	206	114
Botha-Bothe	161	171	182	111	148	125	97
Leribe	341	336	358	166	204	305	320
Mafeteng	142	154	127	75	28	133	91
Maseru	1421	1475	1102	783	445	1004	843
Mohales Hoek	136	59	114	99	88	113	96
Mokhotlong	160	159	100	70	111	133	139
Qachas Nek	62	74	83	43	96	96	77
Quthing	91	58	86	62	49	90	64
Thaba-Tseka	79	92	70	48	43	47	46
Total	**2737**	**2717**	**2371**	1531	**2422**	**2252**	**1887**

Number of Rooms by District 2017 - 2023							
Rooms	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**
Berea	217	175	82	71	224	353	353
Butha-Buthe	251	281	350	275	106	168	173
Leribe	413	407	331	233	139	293	303

afeteng	209	199	184	163	151	294	295
aseru	1559	1405	1583	1269	1 199	1444	1461
ohales Hoek	234	196	812	142	150	275	275
okhotlong	170	162	165	88	109	251	261
ıchas Nek	114	189	144	92	179	222	222
ıthing	172	160	224	178	114	120	120
ıaba-Tseka	162	176	153	1607	86	135	135
ıtal	**3501**	**3350**	**4028**	4118	**2 457**	**3567**	**3598**

Number of Beds by District 2017 -2023							
Beds	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**
Berea	397	293	147	131	349	544	544
Butha-Buthe	520	682	745	654	182	232	247
Leribe	762	698	558	599	209	436	459
Mafeteng	462	421	377	318	294	470	528
Maseru	3256	2727	2770	1794	1 663	2082	2098
Mohales Hoek	387	292	350	222	227	402	281
Mokhotlong	278	276	228	19	148	386	489
Qachas Nek	196	302	186	127	246	342	344

Quthing	336	280	405	319	215	233	318
Thaba-Tseka	287	280	205	126	98	246	145
Total	**6881**	**6251**	**5971**	**4399**	**3631**	**5373**	**5453**

Bed Occupancy by District 2017 - 2023							
District	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**
Berea	20.4	21.0	49.2	0.76	15.2	16.0	18.6
Butha-Buthe	20.8	15.7	14.7	0.15	17.7	12.0	26.4
Leribe	26.4	20.4	27.0	0.17	13.3	26.2	29.3
Mafeteng	15.5	10.3	16.6	0.31	8.0	8.1	7.6
Maseru	21.2	25.0	20.5	0.06	22.2	19.2	23.0
Mohales Hoek	14.7	14.5	14.8	0.45	16.9	23.8	20.8
Mokhotlong	24.6	21.6	28.9	0.92	13.7	9.4	17.6
Qachas Nek	14.5	9.5	20.5	0.79	10.8	13.2	9.2
Quthing	14.1	13.3	11.1	0.31	18.7	16.1	20.4
Thaba-Tseka	10.4	12.4	15.6	0.79	20.3	7.4	14.3
Total	**20.1**	**19.8**	**20.0**	**3.3**	**17.0**	**18.3**	**19.9**

Revenue by District 2017 - 2023							
District	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**
Berea	33,368,984	17,989,446	28,299,635	11254498	18501257	24,741,406	38,664,439
Botha-Bothe	39,006,284	32,159,711	16,983,670	6215687	15746216	11,884,882	12,337,205
Leribe	141,868,787	98,411,990	48,693,129	41116496	18938337	43,406,179	84,158,606
Mafeteng	19,898,295	20,581,992	15,273,448	8586717	6954837	11,983,510	20,115,748
Maseru	601,003,901	693,022,800	241,738,589	109786675	183277304	190,055,504	221,132,794
Mohales Hoek	26,081,191	20,554,712	22,542,402	25764072	18136690	35,069,610	30,353,242
Mokhotlong	18,950,612	12,550,420	9,277,887	3355356	5137767	6,034,939	16,237,028
Qachas Nek	7,045,001	11,217,265	9,953,112	3497106	7299989	9,523,928	9,866,043
Quthing	12,499,406	10,048,867	14,725,306	6482036	13454710	14,271,185	15,047,846

Thaba-Tseka	4,408,623	6,039,416	6,488,874	2455056	3318585	2,878,789	3,021,296
Total	**904,131,085**	**922,576,620**	**413,976,052**	**218513699**	**290765691**	**349,849,932**	**450,934,246**