LESOTHO
TOURISM DEVELOPMENT CORPORATION

International Arrivals & Accommodation Statistics 2022

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 collected with the support from relevant stakeholders. It shows that despite the adversity faced by the Lesotho tourism industry since the advent of COVID-19, Lesotho's tourism has the wind in its sails. This is because international arrivals to Lesotho rebounded moderately in 2022 with arrivals reaching 50% (541 134) of the pre-pandemic level. South Africa remained the major source market for arrivals to Lesotho, accounting for 90.5% of total arrivals. In our view, this signifies restored travellers' confidence, accompanied by the pent-up demand.

Accommodation sales saw strong recovery in 2022 as evidenced by approximately M350m revenue generated, representing an increase of 16.9% relative to 2021. The highest gains were observed in February, March, June, September and November where guest nights and bed occupancy rates were notably high as compared to other months. The average occupancy rate was 19.9% in 2022. This was 2.9 percentage points higher than 2021 and 0.1 percentage point lower than the pre-pandemic level (2019). This pattern reflected positive prospects except that analysis of revenue accrued from accommodation by status of residence of guests indicate that 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 Taiwan as the report indicates that arrivals from these countries are increasing significantly.

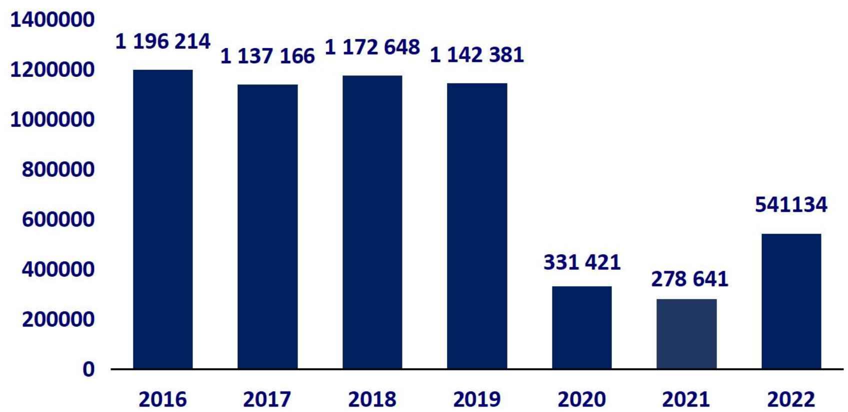
We wish to take this opportunity to extend our sincere appreciation and thanks to all our valued stake holders who have offered support towards consolidation of this report. We further encourage all tourism enterprises to continue submitting the statistical returns for smooth facilitation of future reports,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

Tebello Thoola (Mr.) - CEO ***a.i.***

International Arrivals

INTERNATIONAL ARRIVALS BY COUNTRY OF RESIDENCE

Figure 1: Number of Arrivals by Year - 2016 to 2022



Analysis by country of residence in figure 2 reveals that, similar to previous years, due to its proximity to Lesotho, South Africa has emerged as the leading source market amounting to 489 780, accounting for 90.5% of the total arrivals. Zimbabwe was the second among the top 10 source market with 9 436 arrivals followed by India with 3 892 and the USA with 3 639 on the fourth position.

These Arrivals from South Africa, Zimbabwe, India and USA presented market shares of 90.51%, 1.74%, 0.72%, and 0.67% respectively. Collectively, the top ten source markets accounted for 96.2 percent of the total international arrivals to Lesotho.

Figure 1 above demonstrates the total number of international arrivals recorded from 2016 to 2022. From the figure it is evident that international arrivals witnessed a remarkable growth in 2022 compared to the previous year. In 2022 a total of 541134 international arrivals was recorded, an increase of 94.2 percent (262493) more arrivals. Comparing 2022 (post covid-19 period) with 2021, it is apparent that upon lifting travel suspensions and opening international ports of entry, the number of international arrivals started to increase. The higher number of arrivals in 2020 as compared to 2021 could be attributed to the fact that a lot of Basotho who have acquired South African citizenship and still retain their families in Lesotho were coming home on account of the Covid -19 restrictions that halted business operations across the globe, resulting in people having to go/stay home. Although the 2022 figure denotes a strong recovery, it is noteworthy to mention that the number of international arrivals in 2022 still remained below pre-pandemic levels.

Figure 2: Lesotho's Top 10 Source Markets - 2022

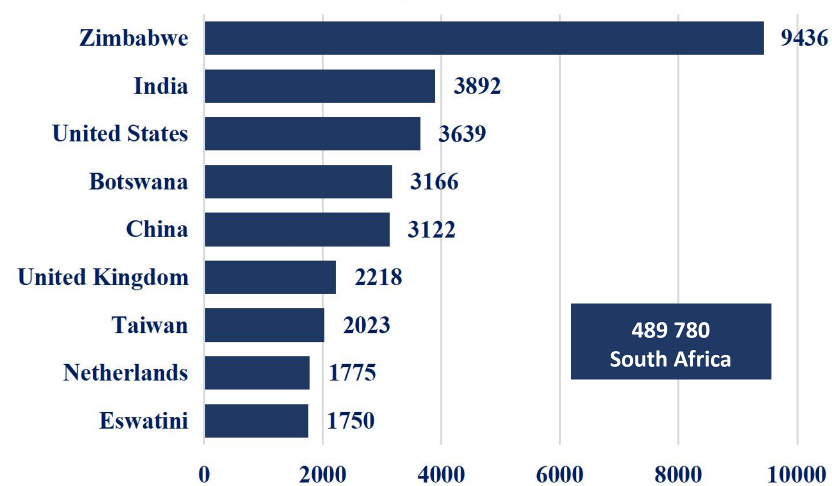


Figure 3 presents the top 5 overseas markets for arrivals to Lesotho. India dominated with 3 892 international arrivals followed by USA (3 639), China (3 122), UK (2 218) and Taiwan (2 023) respectively. Furthermore, in 2022 there seemed to be changes in ranking positions, India and China swapped positions. India moved up from third position to the first position while China moved down from first position to third position.

Analysis of top 5 African source markets in figure 4 indicates that South Africa remained dominant with 489 780 arrivals and it was followed by Zimbabwe with 9 436, Botswana 3 166, Eswatini 1 750 and Malawi which came last with 1 092 arrivals. Malawi progressed to top five African markets, overthrowing Nigeria out.

Figure 3: Top 5 Overseas Markets - 2022

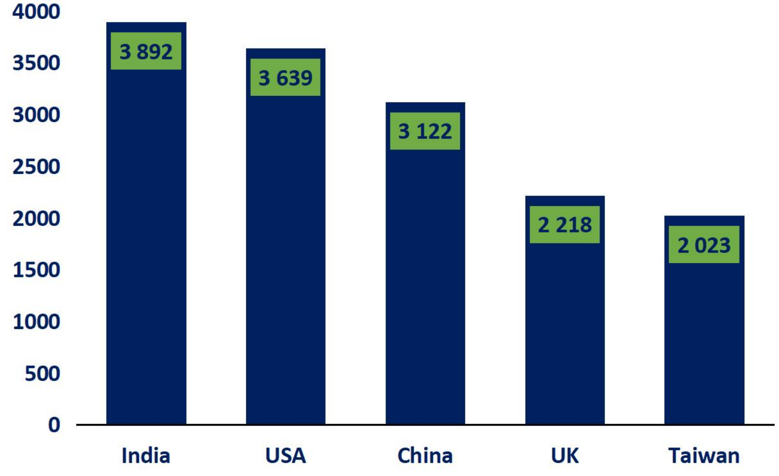


Figure 4: Top 5 African Source Markets - 2022

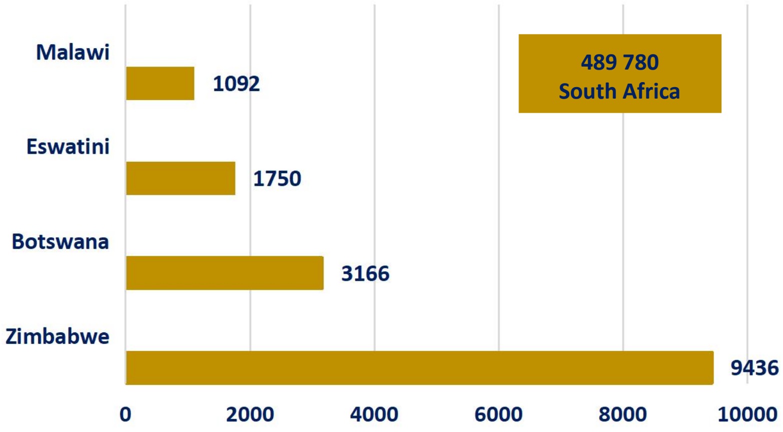
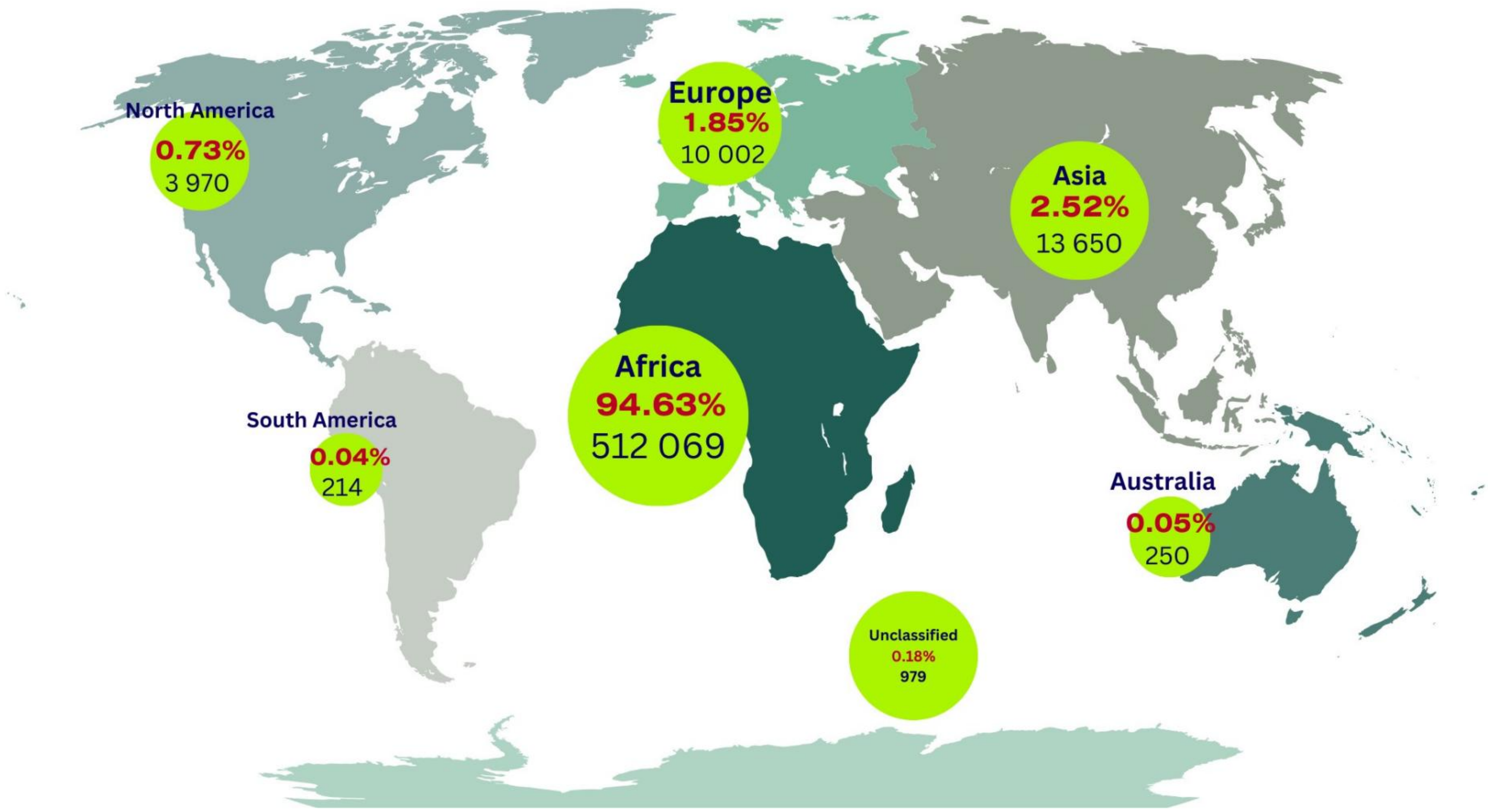


Figure 5: Arrivals by continents - 2022



In terms of continents, Africa was the leading source market for arrivals to Lesotho with 512 069, accounting for 94.63% of total arrivals in 2022. Asia registered second with 2.52% of total arrivals, followed by Europe with 1.85%. North America was on the fourth position with arrivals adding up to 0.73%, followed by Australia on the fifth position, constituting 0.04%. On the sixth and last position was South America with arrivals adding up to 0.04%.

INTERNATIONAL ARRIVALS BY MODE OF TRANSPORT AND PORT OF ENTRY

Figure 6: Percentage Distribution of Arrivals by mode of Transport - 2022

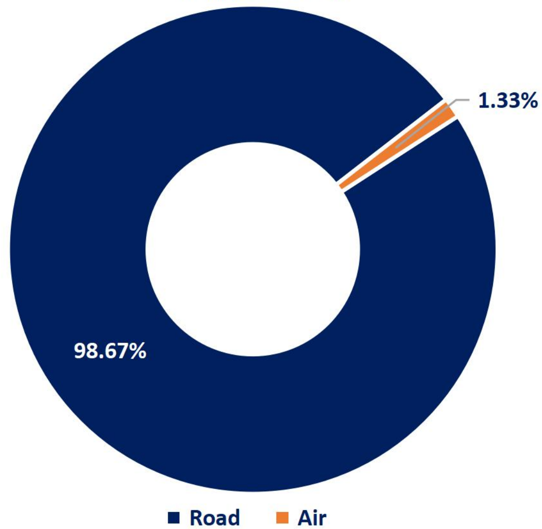
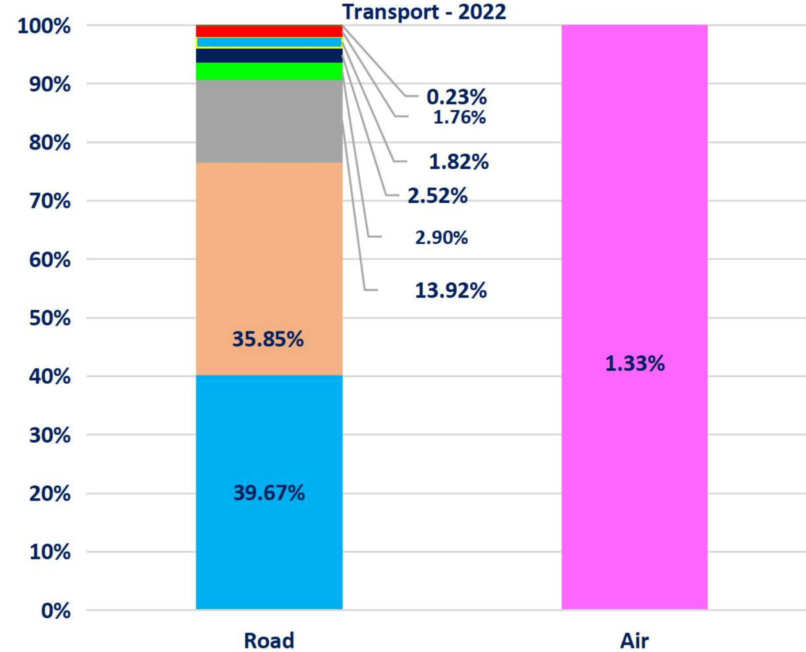


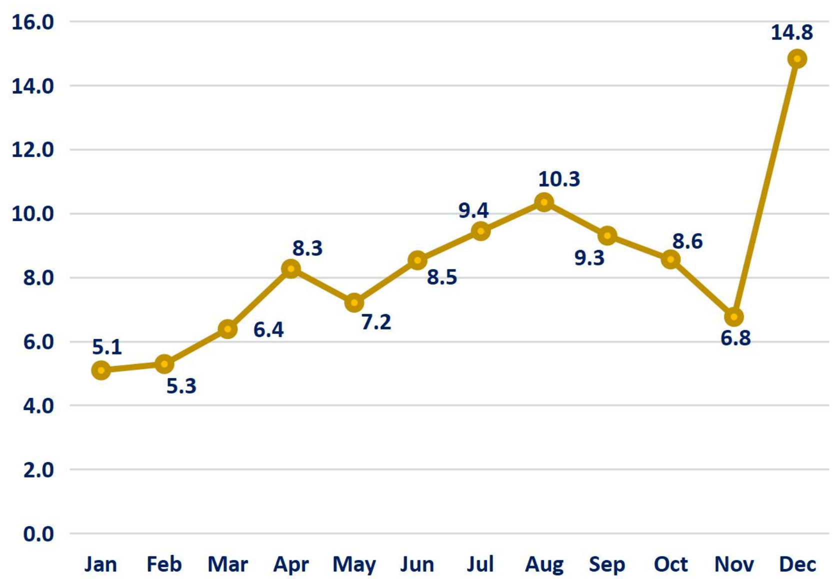
Figure 7: percentage distribution of Arrivals by Mode of Transport - 2022



Analysis of arrivals by mode of transport and port of entry is presented on the above figures. Figure 6 indicates that as usual, 98.7% of arrivals to Lesotho in 2022 came by road while only 1.3% arrived through the airport.

Further analysis by port of entry as illustrated in figure 7 depicts that of the 98.7% that came to Lesotho by road, Maseru Bridge continued to handle the majority of international arrivals, constituting 39.7% (214 672) of the total arrivals followed by Maputsoe Bridge with 35.8% (193 981),then by Caledonspoort bridge with 13.9% (75 337) and Van Rooyens Gate recording 2.9% (15 693). Peka handled the least number of arrivals accounting for 0.2 percent (1 250) in 2022, which is a notable progress because the same port of entry registered no arrivals in 2021.

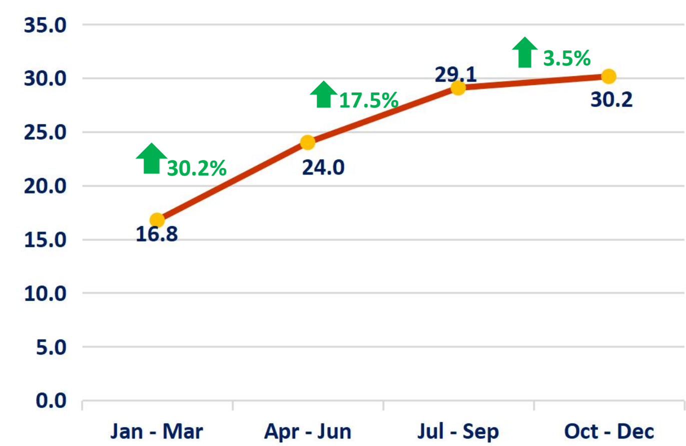
Figure 8: International Arrivals by Month - 2022



Analysis of seasonality in figure 8 shows that arrivals to Lesotho fluctuated across the months in 2022. The figure indicates that between January and April, arrivals increased steadily then dropped in May. There was an increase again June to August. A declining trend was observed between August and November, followed by a sharp increase in December, which accounted for almost 15% of total arrivals. This shows that in 2022, April, June, July, August and December were the peak months for arrivals in Lesotho. This is due to the Easter holidays around April, the winter season in June to August, where Lesotho receives snow chasing visitors and festive season towards the end of the year.

Figure 9 below illustrates that the last quarter of 2022 registered the more arrivals. Between January and March, 90 682 visitors arrived in Lesotho, accounting for 16.8% of the total arrivals. In between the first and the second quarter (April to June), arrivals increased by 30.2%. An increase of 17.5% in arrivals was observed in the third quarter. This increase made it possible for arrivals to reach 29.1% of total arrivals. A further slight increase of 3.5% was observed in the fourth quarter with 163 162 arrivals,

Figure 9: International Arrivals by Quarter - 2022



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

The total number of licensed accommodation establishment was 180 in 2022, out of which, 144 establishments responded to the survey and were covered in the survey, representing 80.0% response rate.

The distribution of establishments on Figure 10 shows that slightly more than half (52.1%) of 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. Hotels, Lodges and B&Bs constituted slightly more than a tenth of all establishments. Other types including conference centers, chalets and institutions made up 7.6% while the 3 home stays accounted for 2.1%.

Figure 10: Number of Accommodation Establishments by Type - 2022

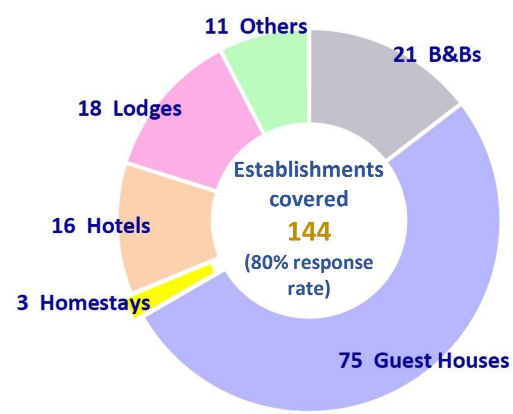


Figure 11: Number of Accommodation Establishments by District - 2022

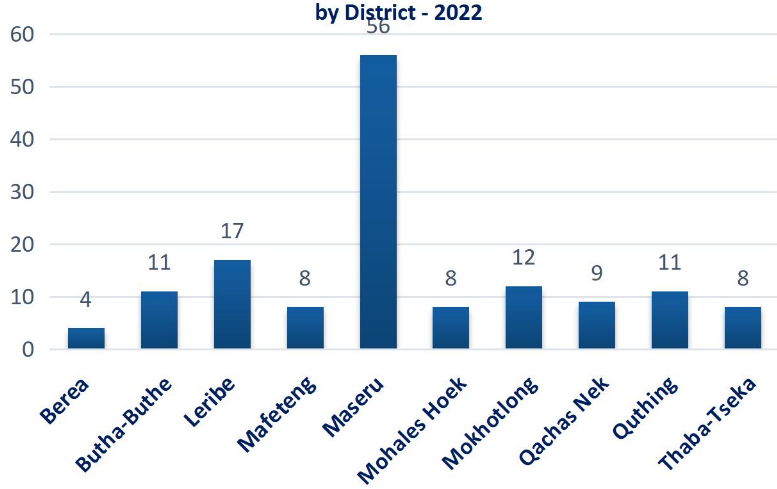


Figure 11 illustrates the distribution of establishments by district. By virtue of being the capital city, Maseru had more accommodation establishments hence more (slightly below half (56)) were covered from Maseru, making up 38.9% of all establishments across all districts. Notable accommodation facilities were also recorded from Botha Bothe, Leribe and Mokhotlong, accounting for slightly less than 10% of all establishments.

Figure 12 below illustrates room capacity by districts, it shows that of the 3 567 rooms available across the country, the majority were in Maseru, accounting for 40.5% capacity rate. The rest of other districts had a room capacity rate of less than 10%. However, 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 has more rooms than other districts except for Maseru. This is because Berea has two fairly high capacity hotels as opposed to other districts where there is only one or no hotels.

Figure 12: Percentage Distribution of Rooms by District - 2022

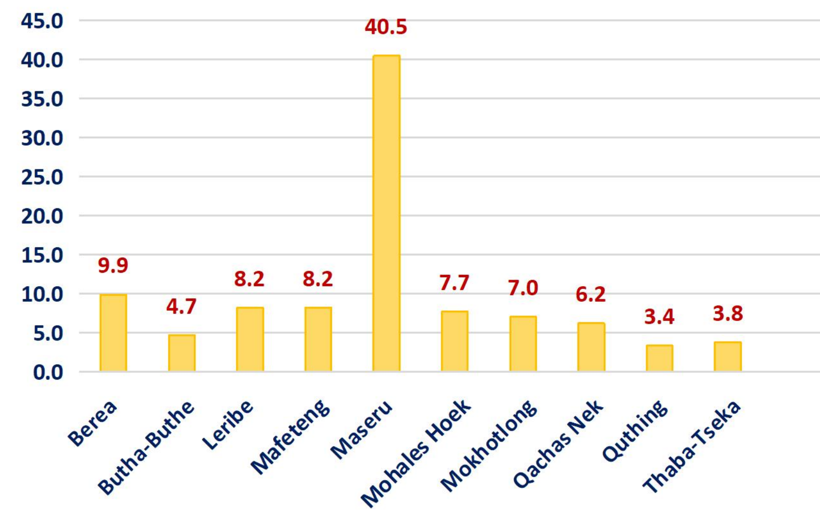
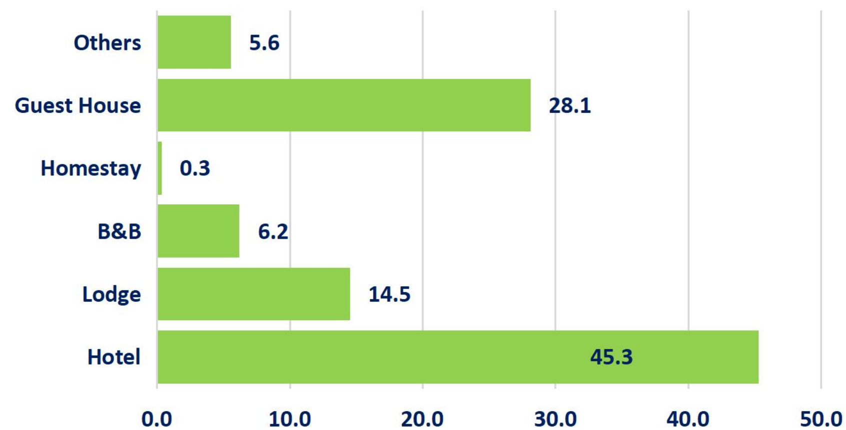


Figure 13: Available Rooms by Type of Establishment - 2022



Further analysis in Figure 13 depicts that close to half (45.3%) of available rooms across the country were hotel rooms, almost one third (28.1%) were Guest House rooms while Lodges accounted for 14.5% room capacity. Other types of establishments recorded below 10% room capacity rates. This pattern shows that even though there were significant number of B&Bs (See figure 10), they probably have less room capacity as compared to lodges and Guest Houses. This is in sync with the standard specifications of B&Bs wherein B&Bs consist of fewer rooms than Guest houses and lodges and are mostly private properties that offer just accommodation and Breakfast.

BED CAPACITY, BED OCCUPANCY AND GUEST NIGHTS

Figure 14: Guest Nights (%) by Month -2022

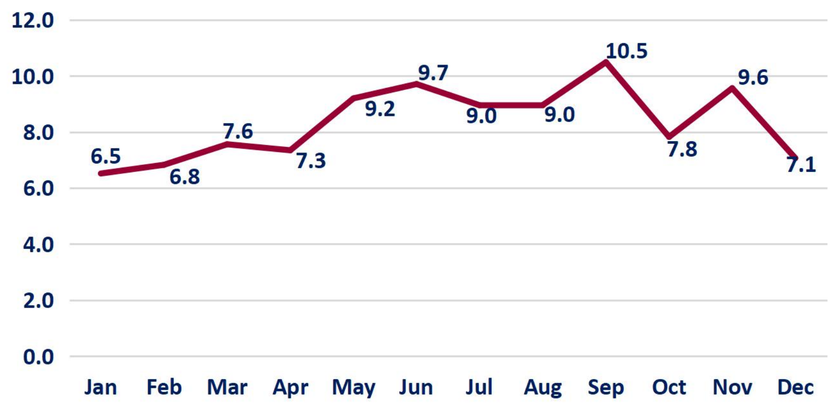
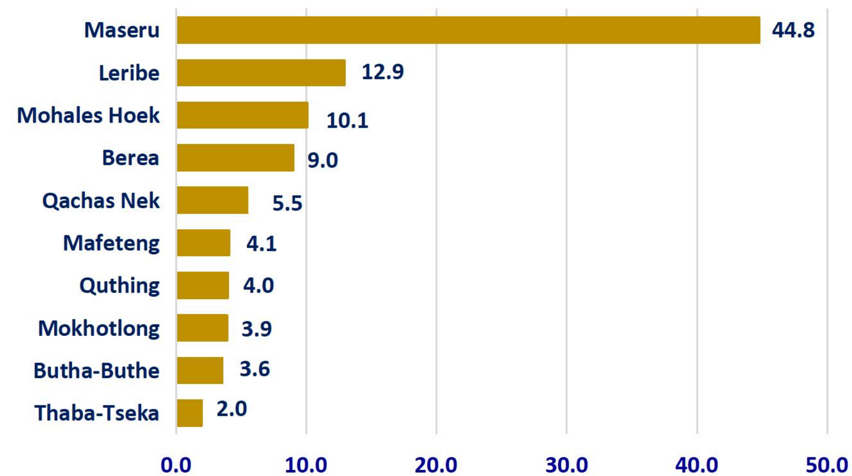


Figure 15: Guest Nights (%) by Districts -2022



Analysis of demand for accommodation in 2022 is depicted in figures 14, 15 and 16 by the number of people who sought accommodation from all types of establishment. Figure 14 indicates that the demand fluctuated across the months with a slight and steady increase between January and March. A significant increase was also observed from April to June, followed by a decline in July then sharp peaks in September and November. The highest occupancy of 10.5% was recorded in September.

Figure 15 shows that Maseru saw the highest demand, registering 44.8% followed by Leribe, Mohale's Hoek and Berea with 12.9%, 10.1% and 9.0% respectively. Thaba Tseka registered the lowest number of guests, constituting only 2.0%.

Further analysis by type of establishment in figure 16 illustrates that, hotels saw the highest demand of 51.2% of total guests. Guest houses registerd second with 30.3% followed by lodges with 11.1% then by B&Bs with 4.8%.

Figure 16: Guest Nights (%) by Type of Establishment -2022

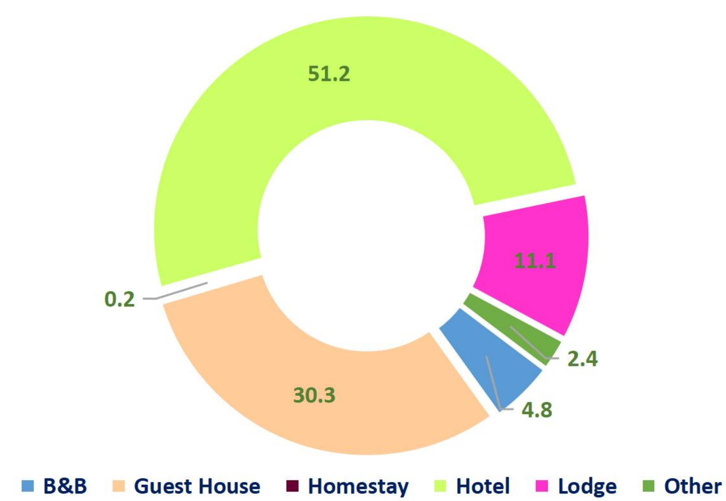


Figure 17: No. of Beds by type of Establishment - 2022

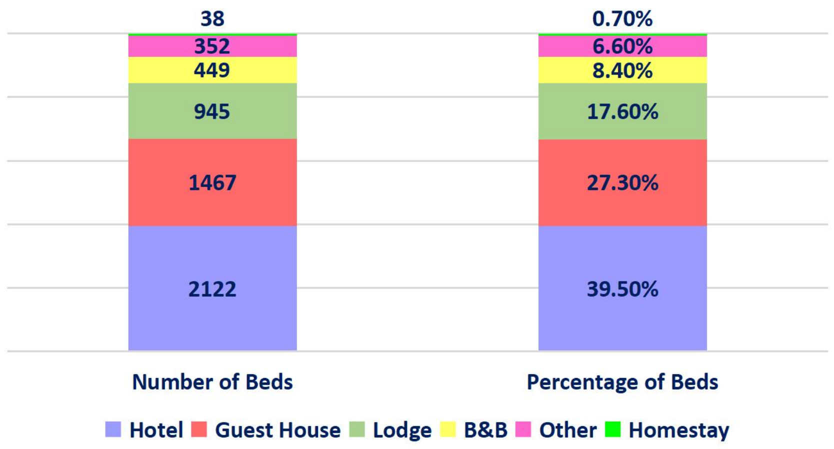
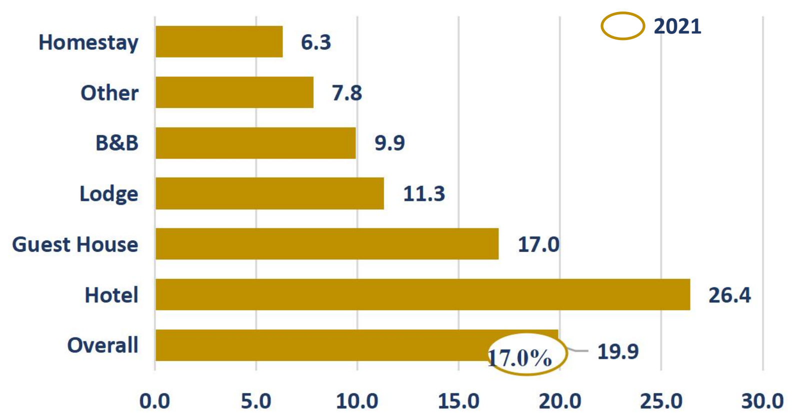


Figure 17 shows that Hotels had the highest bed capacity (39.5%) followed by guest houses with 27.3%, lodges with 17.6% while the rest of Other types of facilities had less than 10% bed capacity.

Figure 18: Average Bed Occupancy by type of Astablishment - 2022



AT WHAT RATE WERE THE BADS USED?

Figure 18 presents Bed occupancy rates by type of establishment. It indicates that hotel beds experienced the highest demand with a bed occupancy rate of 26.4% followed by guest houses with 17.0%. Lodges and B&Bs saw rather lower demand, recording bed occupancy rates below 15%. The figure also shows that the average bed occupancy in 2022 was (19.9%) showing an increase of 2.9% as compared to 2021 which was 17.0%.

Figure 20: Bed Occupancy Rates by District - 2022

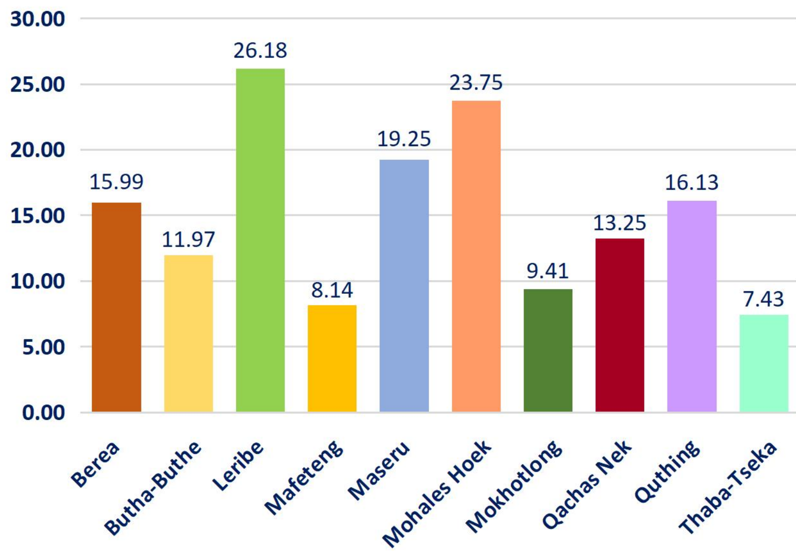
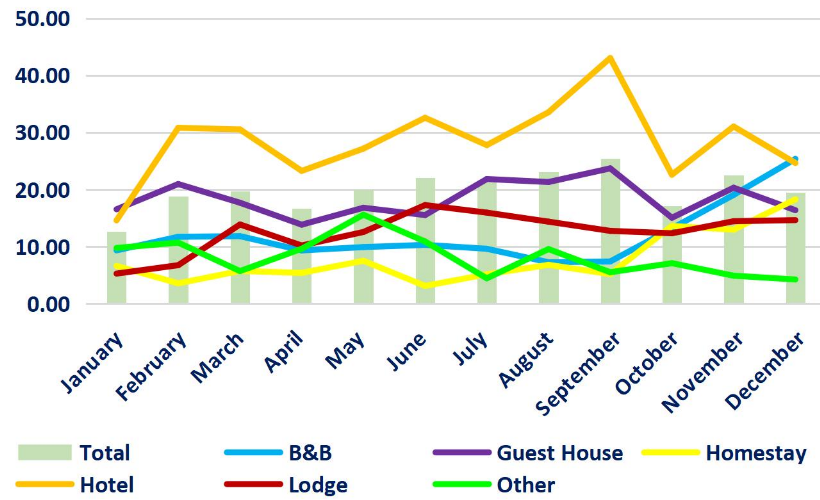


Figure 21: Occupancy Rates by Month and Type of Establishments - 2022



Analysis by district in figure 20 shows that bed occupancy was high in Leribe, Mohale's hoek and Maseru, recording the bed occupancy rates of 26.2%, 23.8% and 19.3% respectively. Thaba Tseka experienced the lowest bed demand with the bed occupancy rate of 7.4%.

Figure 21 illustrates that the overall bed occupancy fluctuated across the months with peaks in February, March, June, August, September and November. The observed hikes were resultant from the Easter holidays, increased travel during the snow season (snow chasing activities), sectoral events which were largely clustered towards and in the last four months of the year.

Hotels experienced the highest (significantly higher than the total rates) bed occupancy rates throughout the year with fluctuations across the months. Notable hikes were observed in February, September and November. Guest Houses followed with a almost a similar trend across the months.

REVENUE ACCRUED FROM ACCOMMODATION SUB-SECTOR

Figure 22: Percentage share of Revenue by Type of Establishment - 2022

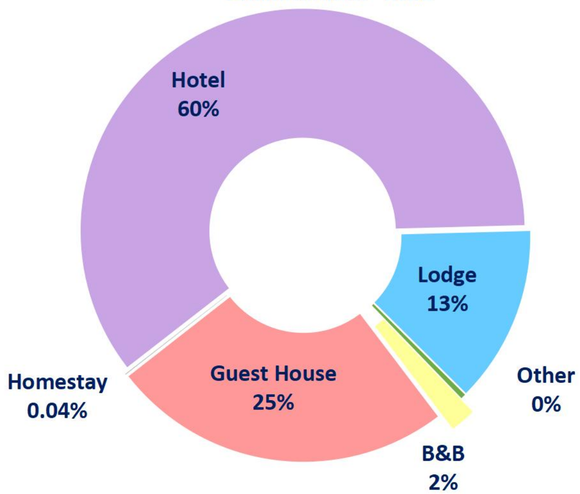
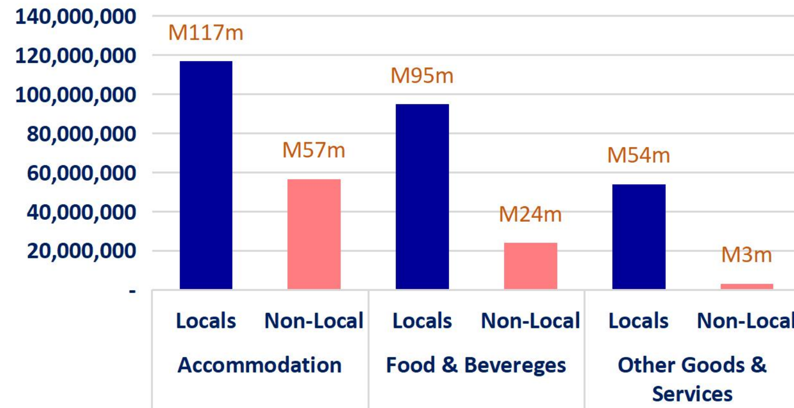


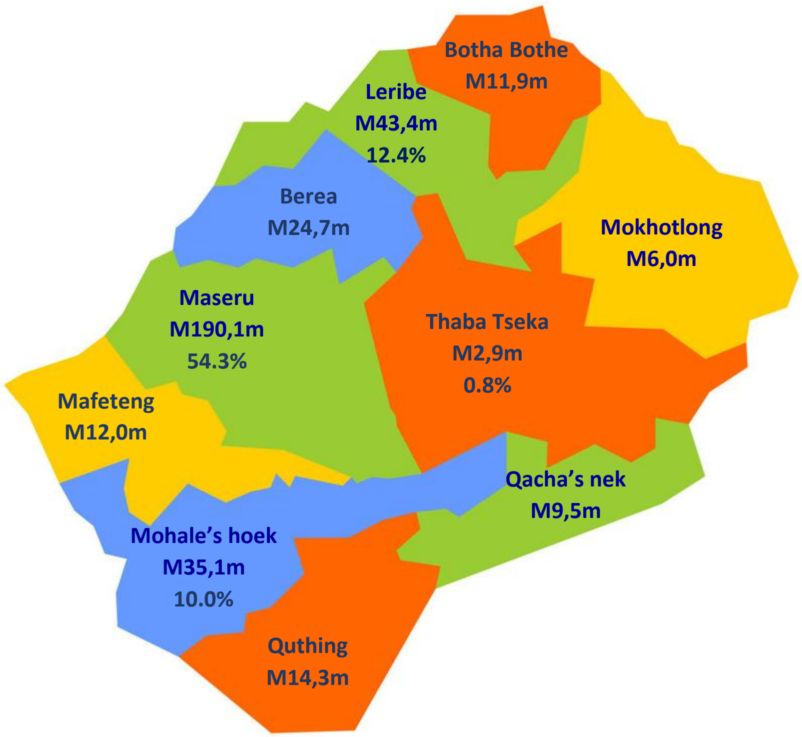
Figure 22 above indicates that of the total revenue accrued from all establishments, 60% was accrued by hotels, 25% by Guest Houses and 13% by Lodges. Other types of accommodation establishments accrued below 5% of the total revenue with homestays registering as low as 0.04%.

Figure 23: Revenue Accrued by Type of Spending and Residence of Visitors - 2022



Analysis of type of spending by residence in figure 23 shows 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 was slightly more than double 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 17 times higher for domestic travelers.

Figure 24: Revenue Accrued by District - 2022



Comparison by districts in Figure 24 shows that more revenue (54.32%) was generated in Maseru, followed by Leribe (12.41%) and Mohale's Hoek with 10.02%. Thaba Tseka registered less revenue, adding up to only 0.82% of the total revenue accrued.

Figure 25: Revenue Accrued by Type of Spending and Years - 2021/2022

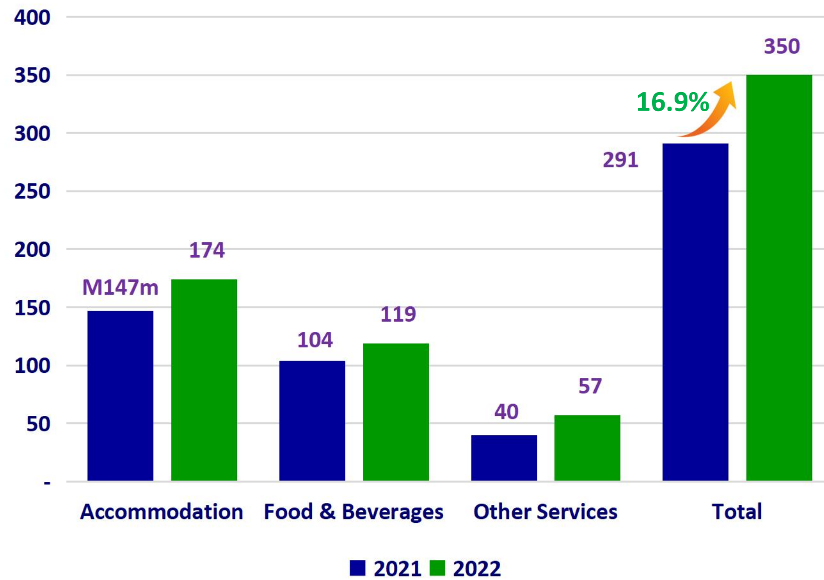
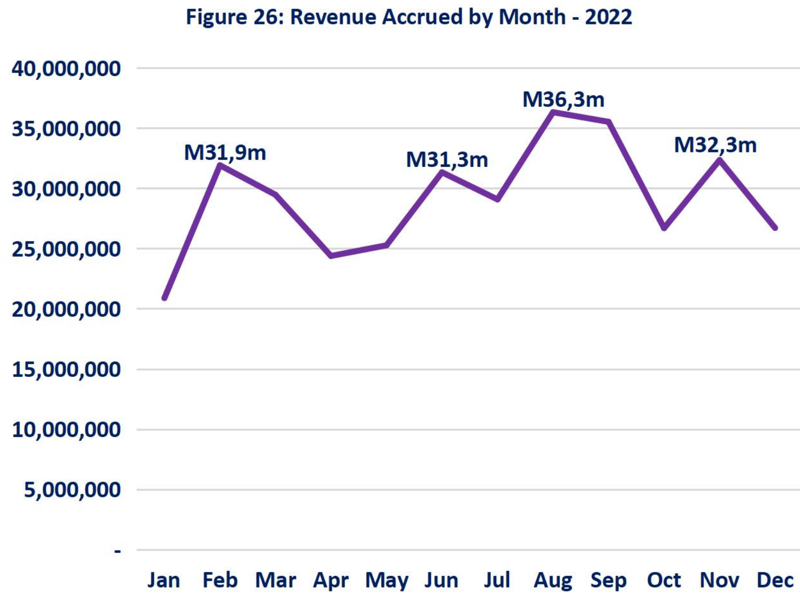


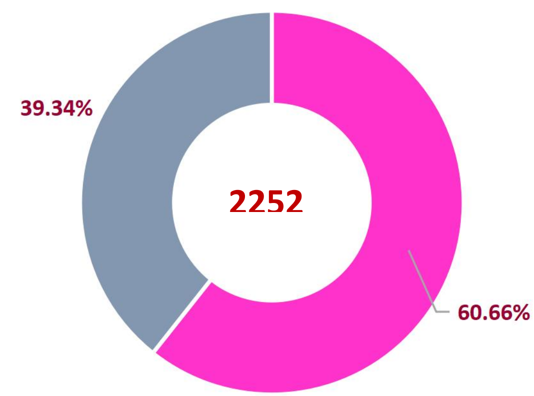
Figure 25 presents the distribution of revenue accrued by type of spending, comparing 2021 and 2022. It illustrates that for both years, more revenue was accrued from accommodation, followed by revenue from Food & beverages while other goods & services generated less revenue. The figure further indicates that revenue accrued in 2022 increased by 16.89% as compared to 2021.



Analysis by month in figure 26 indicates that more revenue was accrued in the February, June, August September and November. This coincides with the observed patterns on the analysis of occupancy rates and guest nights. However, highest revenue was accrued in August yet the highest Bed occupancy rate was observed in September. This could have resulted in spending on food and other hotel services like conferencing because during August, there was a lot of activities that were done in preparation for general elections thus conferencing services and food & beverages could have been the force behind the hike in revenue in August 2022.

The total number of employees in the accommodation sector was 2252 in 2022. Women made up the majority of the workforce in the accommodation sector as shown in figure 27 which shows that 60.7% of employees were females while 39.3% were males.

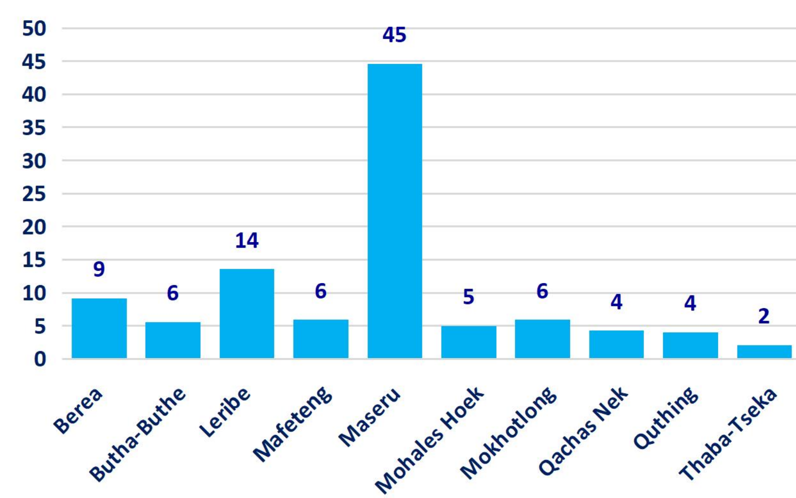
Figure 27: Proportion of Employees by Gender - 2022



According to districts, figure 28 indicates that Maseru had more employees than other districts, which accounted for 45% of across the country. Leribe also registered a significant proportion 14% of employees followed by Berea with 9%. Botha Bothe, Mafeteng and Mokhotlong followed with 6%, then by Mohale's Hoek with 5%.

This is in line with the fact that there were more establishments in Maseru, which resulted in more employees. Leribe and Berea also had one hotel each which are fairly big and popular and may require more workers.

Figure 28: Percentage of Employees by District - 2022



Fibure 29: Distribution of Skilled and Unskilled Employees by Gender -2022

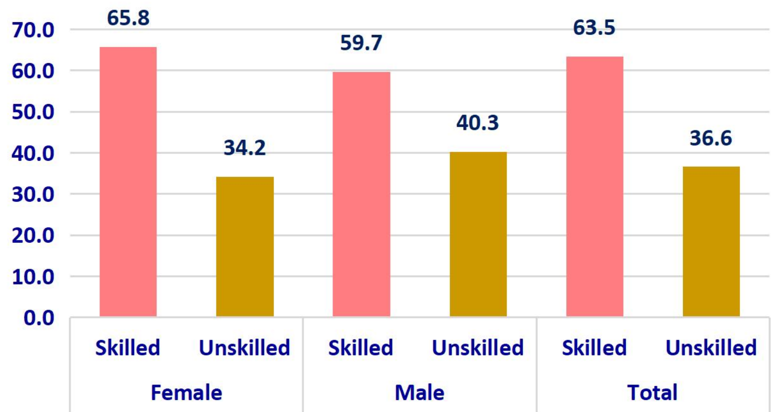


Figure 30: Proportion of Employees by Type of Establishment - 2022

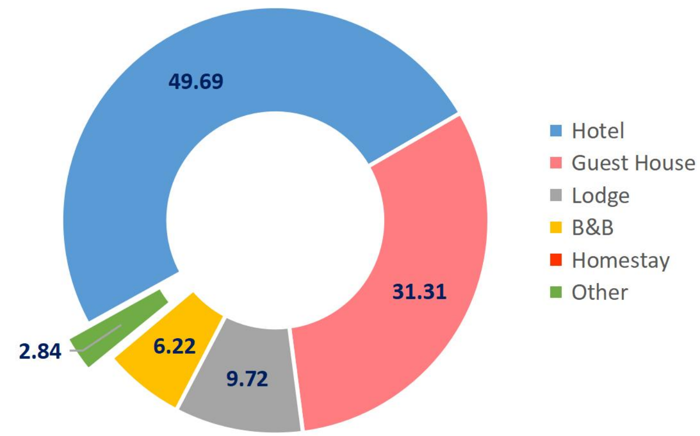


Figure 29 depicts that, there were more skilled (63.5%) personnel in the accommodation sector than unskilled (36.6%). The same observation applied in terms of gender whereat among females, 65.8% were skilled while males registered 59.7% of skilled employees.

Analysis illustrated in figure 30 shows that, hotels had the highest proportion 49.7% of the workforce, followed by Guest houses 31.3%, lodges 9.7%, B&Bs 6.2% and Other 2.5% types of establishments respectively. This pattern is in line with the 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.

Figure 31: Number of Employees in the Accommodation Sub-Sector 2017 - 2022

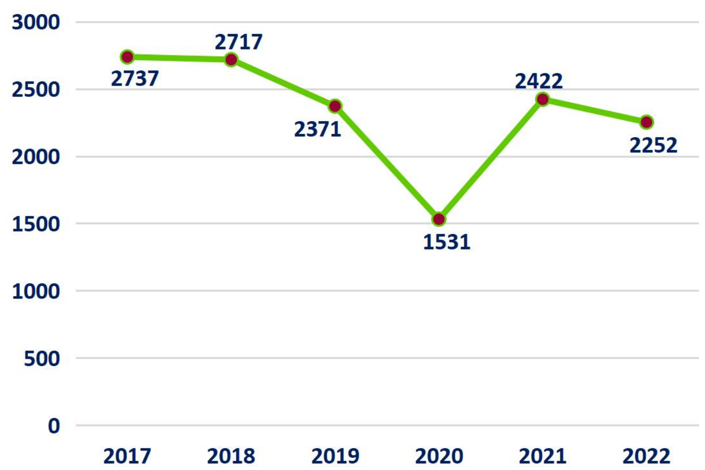


Figure 32: Number of Rooms 2017 -2022

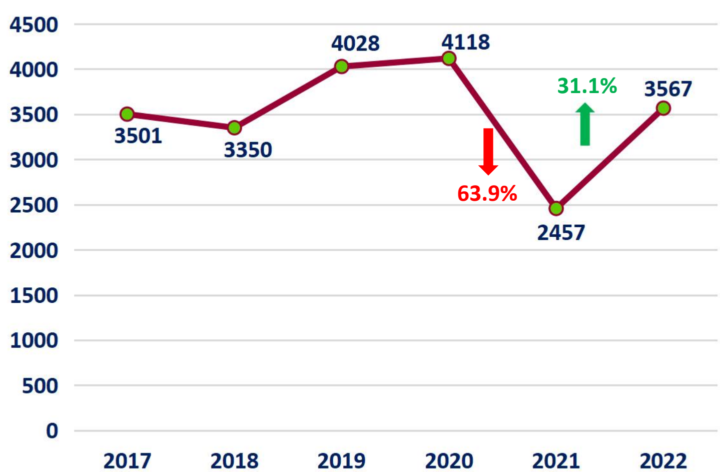


Figure 33: Number of Beds 2017 - 2022

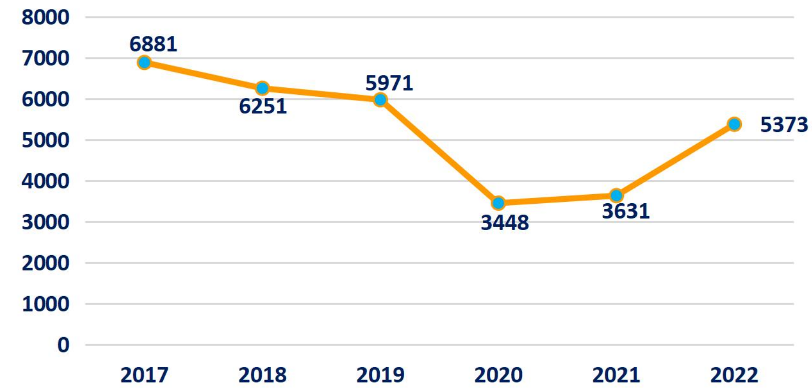
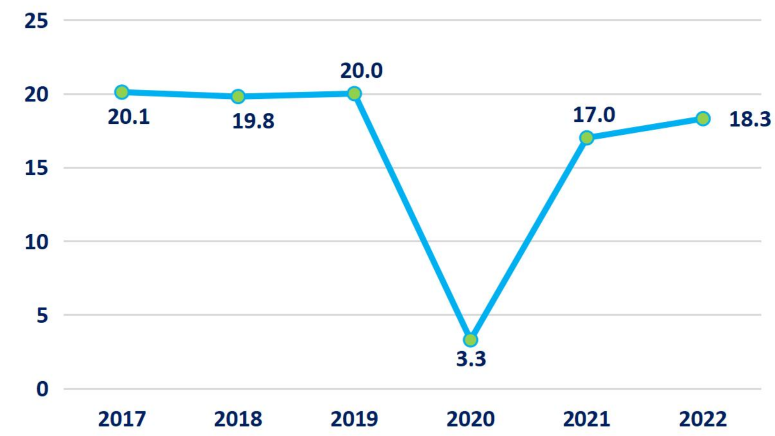


Figure 31 indicates that employees in the accommodation sub-sector have been decreasing slightly since 2018 with a steep decline observed in 2020 due COVID-19. A fairly sharp increase was observed between 2020 and 2021 followed by a slight drop in 2022. This could be because most employees were reinstated in 2021 and retrenched in 2022 when business operators noted that the travel industry has not yet recovered fully, thus it could have been costly to keep all employees. The number of rooms as presented in figure 32 saw a fluctuating trend during the six year period with capacity reaching peak in 2020 and then dropping by 64% in 2021due to closure of some establishments as a result of COVID-19. An increase of 31.1% was recorded in 2022, which was the onset of recovery. Looking at the stocks of beds in figure 33, the number of beds decreased from 2018 to 2020 with a steep decrease (64.5%) between 2019 and 2020 and that was also due to COVID-19. As with the number of rooms, an increase (32.4%) in the number of beds was observed between 2021 and 2022.

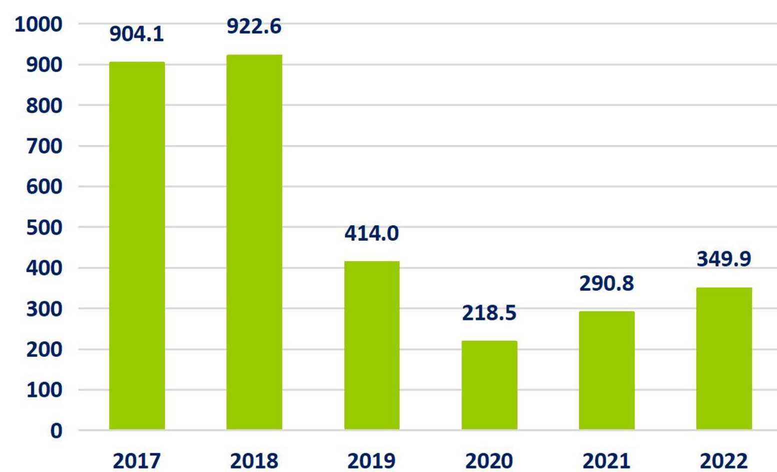
Illustration of Bed occupancy in figure 34 indicates that over the six-year period, 2017 saw the highest demand for accommodation with 20.1% bed occupancy rate. In 2018 the rate slightly dropped with 0.3 percentage points to 19.8%. A slight increase was observed in 2019 followed by a steep 16.7% points drop in 2020. Between 2020 and 2021 an increase of 13.7% was registered, making it possible for the Bed occupancy rate to reach 17% in 2021. A further increase of 1.3% was observed in 2022 with bed occupancy rate recording 18.3%, which signals growth.

Figure 34: Yearly Bed Occupancy Rates 2017 - 2022



Revenue accrued from the accommodation sub-sector as indicated in figure 35 saw a fluctuating trend during the review period. A slight upward (M18.5m increase) trend was observed between 2017 and 2018 with 2018 registering the highest revenue of M922.6 million Maloti, followed by a decline of M508.6m to M414.0m in 2019. A further decline of M195.5m followed in 2020, reaching the lowest revenue of M218.5m. Slight increase was observed from 2021 to 2022 with 2022 revenue reaching M349.9m.

Figure 35: Revenue Accrued 2017 -2022



CONCLUSION

In summary, the report demonstrates that although Lesotho's international arrivals were undoubtedly dented by the COVID 19 pandemic and have not reached the pre pandemic levels yet, 2022 figures indicate a resurgence and a strong come back in the Tourism Industry. From the analysis, it is evident that 541 134 international arrivals entered Lesotho therefore portraying an awe-inspiring increase of 94.2 percent from the 2021 arrivals of 278,641.

According to the distribution of tourists by country of residence, it is evident that Lesotho is still heavily reliant on South Africa; its neighbouring country which accounted for about 90.5% of the 2022 arrivals.

Furthermore, the report indicates that in 2022 revenue from accommodation establishments soared to an astounding M350 million, marking a 16.9% increase compared to 2021. From these figures it is apparent that in 2022 the tourism industry showcased an unwavering resilience and a remarkable growth that was probably attributed to the increasing demand for travel as well as general elections and inauguration of the Prime Minister.

The results also display that women made up the majority (60.7%) of the workforce in the accommodation sector as compared to males who accounted for 39.3% of the total workforce. Additionally, from the report it is clear that Lesotho still continued to contribute positively towards the economy by employing more local people who are skilled.

On occupancy levels, 2022 displayed some positive traction since the average occupancy rate increased by 1.3% relative to 2021, registering 18.3%. It was also clear from the analysis that 2022 exhibited a similar pattern of 2021 (with the exception of B&Bs) where hotels experienced the highest demand with a bed occupancy rate of 22.8% followed by guest Houses with 17.7% Lodges and B&Bs respectively.

In conclusion, it has been clear that although the global landscape has posed challenges, including inflation, rising energy prices, Lesotho's international arrivals numbers seem to moving in the right direction. In order for Lesotho to surpass pre-pandemic numbers it is imperative that it markets itself more aggressively so that it can exploit all avenues to expand its reach in other major source markets such as India, China, USA, UK, and Taiwan. Moreover, in order to increase arrivals and occupancy rates, it is also important for Lesotho to improve its visa turnaround times, air access as well as safety.

As the world reawakens, tourists are flocking back to Lesotho to see its natural beauty. Working together with the government, private sector and all stakeholders will definitely boost Lesotho tourism's industry as well as contribution to the economy.

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

2018	2019	2021	2022	% Change					
				22/21	21/19	19/18	18/17	17/16	16/15
1,172,648	1,142,381	278,641	541,134	94.2	-75.6	-2.6	3.1	-4.9	10.5

Country	Rank 2022	Arrivals 2022	Rank 2021	Arrivals 2021	% Change 21/22
South Africa	1	489,780	1	249,349	96.4
Zimbabwe	2	9,436	2	5,734	64.6
India	3	3,892	5	2,425	60.5
USA	4	3,639	6	1,642	121.6
Botswana	5	3,166	7	1,585	99.7
China	6	3,122	3	2,571	21.4
UK	7	2,218	11	704	215.1
Taiwan	8	2,023	4	2,524	-19.8
Netherlands	9	1,775	22	323	449.5
Eswatini	10	1,750	8	962	81.9
Total		**541,134**		**278,641**	

Country	No. of Arrivals	% Share
South Africa	489,780	90.5
Zimbabwe	9,436	1.7
India	3,892	0.7
United States	3,639	0.7
Botswana	3,166	0.6
China	3,122	0.6
United Kingdom	2,218	0.4
Taiwan	2,023	0.4
Netherlands	1,775	0.3
Eswatini	1,750	0.3
Other	20,333	3.8
Total	541,134	100.0

Month	No. of Arrivals	% Change
January	27,546	256.4
February	28,611	251.4
March	34,525	73.9
April	44,726	93.7
May	38,991	71.2
June	46,164	96.8
July	51,093	134.7
August	55,990	123.5
September	50,326	95.0
October	46,317	73.8
November	36,592	31.9
December	80,253	72.3
Total	541,134	

Continent	2022	2021	% Change
Africa	512,069	262,435	95.1
Asia	13,650	10,070	35.6
Australia	250	61	309.8
Europe	10,002	3,538	182.7
North America	3,970	1,788	122.0
South America	214	242	-11.6
Unknown	979	507	93.1
Total	541,134	278,641	

Continent	2022	% Share
Africa	512,069	94.6
Asia	13,650	2.5
Australia	250	0.0
Europe	10,002	1.8
North America	3,970	0.7
South America	214	0.0
Unknown	979	0.2
Total	541,134	

Quarter	2021	2022	% Change
Jan-Mar	35,724	90,682	153.8
Apr-Jun	69,328	129,881	87.3
Jul-Sep	72,625	157,409	116.7
Oct-Dec	100,964	163,162	61.6
Total	278,641	541,134	

Bed Occupancy Rates by Month – 2022 ((Beds Used /Beds Spaces) x 100)							
Month	**B&B**	**Guest House**	**Homestay**	**Hotel**	**Lodge**	**Other**	**All Establishments**
January	9.35	16.54	6.62	14.60	5.28	9.77	12.68
February	11.72	20.96	3.57	30.81	6.75	10.70	18.86
March	11.83	17.68	5.73	30.53	13.88	5.72	19.72
April	9.34	13.84	5.40	23.26	10.20	9.62	16.74
May	9.92	16.80	7.53	27.16	12.56	15.59	19.90
June	10.30	15.53	3.12	32.56	17.28	10.90	22.03
July	9.62	21.84	5.16	27.77	15.95	4.45	21.32
August	7.26	21.32	6.81	33.54	14.37	9.57	23.12
September	7.40	23.71	5.19	43.03	12.76	5.51	25.45
October	13.20	15.06	13.62	22.60	12.34	7.10	17.20
November	19.06	20.32	12.96	31.04	14.45	4.91	22.53
December	25.37	16.38	18.28	24.65	14.64	4.25	19.48
Average	**9.92**	**16.97**	**6.31**	**26.41**	**11.32**	**7.82**	**18.29**

Number of Employees – Residents - 2022							
District	**B&B**	**Guest House**	**Homestay**	**Hotel**	**Lodge**	**Other**	**Total**
Berea	3	14	0	187	0	0	204
Butha-Buthe	13	41	0	46	22	0	122
Leribe	17	151	0	114	0	20	302
Mafeteng	0	26	0	67	39	0	132
Maseru	95	233	0	538	131	5	1,002
Mohales Hoek	0	79	0	4	11	18	112
Mokhotlong	2	31	3	94	3	0	133
Qachas Nek	2	23	0	62	1	8	96
Quthing	2	74	2	0	0	11	89
Thaba-Tseka	4	30	0	0	11	2	47
Total	**138**	**702**	**5**	**1,112**	**218**	**64**	**2,239**

Number of Employees - Non-Residents - 2022							
District	**B&B**	**Guest House**	**Homestay**	**Hotel**	**Lodge**	**Other**	**Total**
Berea	0	0	0	2	0	0	2
Butha-Buthe	2	1	0	0	0	0	3
Leribe	0	0	0	2	1	0	3
Mafeteng	0	0	0	1	0	0	1
Maseru	0	0	0	2	0	0	2
Mohales Hoek	0	1	0	0	0	0	1
Mokhotlong	0	0	0	0	0	0	0
Qachas Nek	0	0	0	0	0	0	0
Quthing	0	1	0	0	0	0	1
Thaba-Tseka	0	0	0	0	0	0	0
Total	**2**	**3**	**0**	**7**	**1**	**0**	**13**

Number of Employees – Residents and Non-Residents - 2022							
District	**B&B**	**Guest House**	**Homestay**	**Hotel**	**Lodge**	**Other**	**Total**
Berea	3	14	0	189	0	0	206
Butha-Buthe	15	42	0	46	22	0	125
Leribe	17	151	0	116	1	20	305
Mafeteng	0	26	0	68	39	0	133
Maseru	95	233	0	540	131	5	1,004
Mohales Hoek	0	80	0	4	11	18	113
Mokhotlong	2	31	3	94	3	0	133
Qachas Nek	2	23	0	62	1	8	96
Quthing	2	75	2	0	0	11	90
Thaba-Tseka	4	30	0	0	11	2	47
Total	**140**	**705**	**5**	**1,119**	**219**	**64**	**2,252**

Number of Employees by Type of Establishment and whether Skilled - 2022							
Type of Establishment	Male		Female		Total		Grand Total
	Unskilled	Skilled	Unskilled	Skilled	Unskilled	Skilled	
B&B	34	21	41	44	75	65	140
Guest House	159	115	195	236	354	351	705
Homestay	0	1	2	2	2	3	5
Hotel	97	334	164	524	261	858	1119
Lodge	57	40	51	71	108	111	219
Nature Reserve	11	18	13	22	24	40	64
Total	**358**	**529**	**466**	**899**	**824**	**1428**	**2252**

Number of Rooms by District and type of Establishment - 2022							
District	Hotel	Lodge	B&B	Homestay	Guest House	Others	Total
Berea	324	0	5	0	24	0	353
Butha-Buthe	70	65	10	0	23	0	168
Leribe	124	0	32	0	124	13	293
Mafeteng	121	132	0	0	41	0	294
Maseru	676	209	114	0	397	48	1444
Mohales Hoek	44	35	0	0	136	60	275
Mokhotlong	138	10	7	2	94	0	251
Qachas Nek	118	32	6	0	43	23	222
Quthing	0	0	3	10	76	31	120
Thaba-Tseka	0	35	44	0	45	11	135
Total	**1615**	**518**	**221**	**12**	**1003**	**198**	**3567**

Number of Beds by District and Type of Establishment - 2022							
District	**B&B**	**Guest House**	**Homestay**	**Hotel**	**Lodge**	**Others**	**Total**
Berea	6	24	0	514	0	0	544
Butha-Buthe	22	82	0	35	93	0	232
Leribe	43	173	0	189	0	31	436
Mafeteng	0	51	0	149	270	0	470
Maseru	250	558	0	795	431	48	2,082
Mohales Hoek	0	179	0	78	35	110	402
Mokhotlong	8	131	20	210	17	0	386
Qachas Nek	6	58	0	152	64	62	342
Quthing	6	153	18	0	0	56	233
Thaba-Tseka	108	58	0	0	35	45	246
Total	**449**	**1,467**	**38**	**2,122**	**945**	**352**	**5,373**

Number of Beds available by Month - 2022							
Month	**B&B**	**Guest House**	**Homestay**	**Hotel**	**Lodge**	**Other**	**Total**
January	449	1467	38	2122	945	352	5373
February	337	1611	29	1080	874	348	4279
March	335	1383	54	1330	695	294	4091
April	367	1447	29	2083	631	311	4868
May	344	1513	9	2061	766	261	4954
June	339	1478	31	1976	826	245	4895
July	295	1307	20	1760	789	240	4411
August	243	1443	9	1505	756	183	4139
September	274	1440	9	1498	926	349	4496
October	324	1414	9	2017	808	259	4831
November	213	1376	9	1970	693	413	4674
December	347	1103	9	1439	577	215	3690

Number of Beds used by District - 2022							
District	**B&B**	**Guest House**	**Homestay**	**Hotel**	**Lodge**	**Others**	**Total**
Berea	211	885	0	30,661	0	0	31,757
Butha-Buthe	1,322	5,955	16	1,067	1775	0	10,135
Leribe	1,742	13,998	0	15,994	9782	154	41,670
Mafeteng	9	6,589	83	2,363	4927	0	13,971
Maseru	7,665	35,809	0	85,307	17093	384	146,258
Mohales Hoek	217	3,522	0	25,346	1193	4,574	34,852
Mokhotlong	779	7,817	34	4,185	122	320	13,257
Qachas Nek	635	3,578	0	11,382	5	934	16,534
Quthing	396	12,325	356	0	0	645	13,722
Thaba-Tseka	1,102	4,069	0	0	13	1,491	6,675
Total	**14,078**	**94,547**	**489**	**176,305**	**34,910**	**8,502**	**328,831**

Number of Beds used by Month - 2022							
Month	**B&B**	**Guest House**	**Homestay**	**Hotel**	**Lodge**	**Others**	**Total**
January	1,301	7,522	78	9,603	1,546	1,066	21,116
February	1,106	9,455	29	9,317	1,652	1,043	22,602
March	1,229	7,582	96	12,587	2,990	521	25,005
April	1,028	6,010	47	14,536	1,930	898	24,449
May	1,058	7,882	21	17,353	2,983	1,261	30,558
June	1,048	6,884	29	19,302	4,281	801	32,345
July	880	8,848	32	15,154	3,902	331	29,147
August	547	9,535	19	15,647	3,368	543	29,659
September	608	10,241	14	19,337	3,544	577	34,321
October	1,326	6,600	38	14,128	3,091	570	25,753
November	1,218	8,387	35	18,346	3,004	608	31,598
December	2,729	5,601	51	10,995	2,619	283	22,278
Total	**14,078**	**94,547**	**489**	**176,305**	**34,910**	**8,502**	**328,831**

Number of Bed Spaces by Month – 2022 (beds available x days available)							
Month	**B&B**	**Guest House**	**Homestay**	**Hotel**	**Lodge**	**Other**	**Total**
January	13919	45477	1178	65782	29295	10912	166563
February	9436	45108	812	30240	24472	9744	119812
March	10385	42873	1674	41230	21545	9114	126821
April	11010	43410	870	62490	18930	9330	146040
May	10664	46903	279	63891	23746	8091	153574
June	10170	44340	930	59280	24780	7350	146850
July	9145	40517	620	54560	24459	7440	136741
August	7533	44733	279	46655	23436	5673	128309
September	8220	43200	270	44940	27780	10470	134880
October	10044	43834	279	62527	25048	8029	149761
November	6390	41280	270	59100	20790	12390	140220
December	**10757**	**34193**	**279**	**44609**	**17887**	**6665**	**114390**

Number of Bed Spaces by District - 2022							
District	**B&B**	**Guest House**	**Homestay**	**Hotel**	**Lodge**	**Others**	**Total**
Berea	2190	8760	0	187610	0	0	198560
Butha-Buthe	8030	29930	0	12775	33945	0	84680
Leribe	15695	63145	0	68985	0	11315	159140
Mafeteng	0	18615	0	54385	98550	0	171550
Maseru	91250	203670	0	290175	157315	17520	759930
Mohales Hoek	0	65335	0	28470	12775	40150	146730
Mokhotlong	2920	47815	7300	76650	6205	0	140890
Qachas Nek	2190	21170	0	55480	23360	22630	124830
Quthing	2190	55845	6570	0	0	20440	85045
Thaba-Tseka	39420	21170	0	0	12775	16425	89790

Revenue by Month and Type of Spending (in Million Maloti) - 2022							
Month	Accommodation		Food & Beverages		Other Goods & Services		Total
	Residents	Non-Residents	Residents	Non-Residents	Residents	Non-Residents	
January	7,329,711	2,015,345	6,547,833	777,899	4,067,446	137,500	20,875,733
February	10,390,479	3,455,297	13,128,097	1,221,001	3,612,780	101,963	31,909,618
March	10,342,499	5,940,529	6,385,242	2,598,920	3,952,331	241,671	29,461,192
April	9,627,782	2,172,977	6,795,651	1,659,517	3,989,329	132,642	24,377,896
May	9,594,585	3,896,967	5,678,457	1,482,969	4,437,138	170,295	25,260,411
June	11,397,500	4,872,336	8,400,176	1,737,207	4,823,635	93,858	31,324,712
July	8,929,902	5,343,045	6,969,654	1,996,182	5,687,318	147,485	29,073,586
August	12,525,202	5,291,472	9,573,074	2,522,215	6,040,620	364,400	36,316,983
September	13,508,754	3,756,236	10,444,449	2,603,473	4,991,603	212,639	35,517,154
October	6,672,568	6,520,914	6,419,788	2,889,819	3,516,802	668,800	26,688,691
November	8,537,667	8,588,738	7,838,905	2,697,279	4,481,390	198,279	32,342,257
December	8,105,813	4,760,963	6,736,130	1,870,001	4,536,533	692,259	26,701,699
2022	**116,962,462**	**56,614,818**	**94,917,455**	**24,056,481**	**54,136,925**	**3,161,791**	**349,849,932**

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

Number of Beds by District 2017 -2022						
Beds	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**
Berea	397	293	147	131	349	544
Butha-Buthe	520	682	745	654	182	232
Leribe	762	698	558	599	209	436
Mafeteng	462	421	377	318	294	470
Maseru	3256	2727	2770	1794	1 663	2082
Mohales Hoek	387	292	350	222	227	402
Mokhotlong	278	276	228	19	148	386
Qachas Nek	196	302	186	127	246	342
Quthing	336	280	405	319	215	233
Thaba-Tseka	287	280	205	126	98	246
Total	6881	6251	5971	4399	3631	5373

Number of Rooms by District 2017 - 2022						
Rooms	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**
Berea	217	175	82	71	224	353
Butha-Buthe	251	281	350	275	106	168
Leribe	413	407	331	233	139	293
Mafeteng	209	199	184	163	151	294
Maseru	1559	1405	1583	1269	1 199	1444
Mohales Hoek	234	196	812	142	150	275
Mokhotlong	170	162	165	88	109	251
Qachas Nek	114	189	144	92	179	222
Quthing	172	160	224	178	114	120
Thaba-Tseka	162	176	153	1607	86	135
Total	**3501**	**3350**	**4028**	4118	**2 457**	**3567**

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

Revenue by District 2017 - 2022						
District	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**
Berea	33,368,984	17,989,446	28,299,635	11254498	18501257	24,741,406
Botha-Bothe	39,006,284	32,159,711	16,983,670	6215687	15746216	11,884,882
Leribe	141,868,787	98,411,990	48,693,129	41116496	18938337	43,406,179
Mafeteng	19,898,295	20,581,992	15,273,448	8586717	6954837	11,983,510
Maseru	601,003,901	693,022,800	241,738,589	109786675	183277304	190,055,504
Mohales Hoek	26,081,191	20,554,712	22,542,402	25764072	18136690	35,069,610
Mokhotlong	18,950,612	12,550,420	9,277,887	3355356	5137767	6,034,939
Qachas Nek	7,045,001	11,217,265	9,953,112	3497106	7299989	9,523,928
Quthing	12,499,406	10,048,867	14,725,306	6482036	13454710	14,271,185
Thaba-Tseka	4,408,623	6,039,416	6,488,874	2455056	3318585	2,878,789
Total	**904,131,085**	**922,576,620**	**413,976,052**	**218513699**	**290765691**	**349,849,932**