



# INTERNATIONAL ARRIVALS & ACCOMMODATION STATISTICS 2024

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# FOREWORD

According to the UN Tourism, an estimated 1.4 billion international tourists travelled across the globe, marking a 99% recovery compared to 2019 and an 11% increase over 2023. Lesotho reached 84% mark of the pre pandemic levels, representing a 20% growth relative to the previous year.

This trend signifies recovery and resurgence of Lesotho's tourism industry following the turbulence of recent years, despite the ongoing economic, geopolitical and climate challenges. Lesotho continues to growth in arrivals from different markets. South Africa remained the major source market for arrivals to Lesotho and maintained the proportion of 89.6% of total arrivals. Zimbabwe, Botswana, USA and India also registered notable numbers.

Hospitality service sales (including accommodation, food & beverages and other services) saw a growth of M91m in revenue in 2024, reaching approximately M542m of revenue generated. Significant gains were observed in the months of May and November, where bed occupancy rates were notably high as compared to other months. The average bed occupancy rate was 23.6% in 2024, which was 3.7 percentage points higher than in 2023. Further analysis on revenue revealed a positive trend

signalled by a marginal difference between revenue generated from locals and non-locals, implying an improvement in spending by non-locals.

In recent years, it has been noted that opportunities for growth of the tourism sector lies in Meetings, Incentives, Conferences and Exhibitions (MICE). This niche market promotes international collaboration and investment, which translate to more arrivals and spending. From the analysis in this report, we can confidently agree with this notion as evident from the arrivals that increased during the dates of the major tourism event held in different areas across the country, whereat revenue increased as well. To further unlock the potential of MICE, Lesotho must focus on developing appropriate facilities, improving marketing strategies, and building collaborations between government and the private sector.

Our sincerest appreciation and hearty thanks are extended to all our valued stake holders who have offered support towards consolidation of this report. In particular, tourism enterprises for their continued cooperation in submission of the monthly statistical returns.

Lets Measure, Plan, Attract and Grow!!

# INTERNATIONAL ARRIVALS



**World International Tourist Arrivals by Region**  
**% change from 2019**

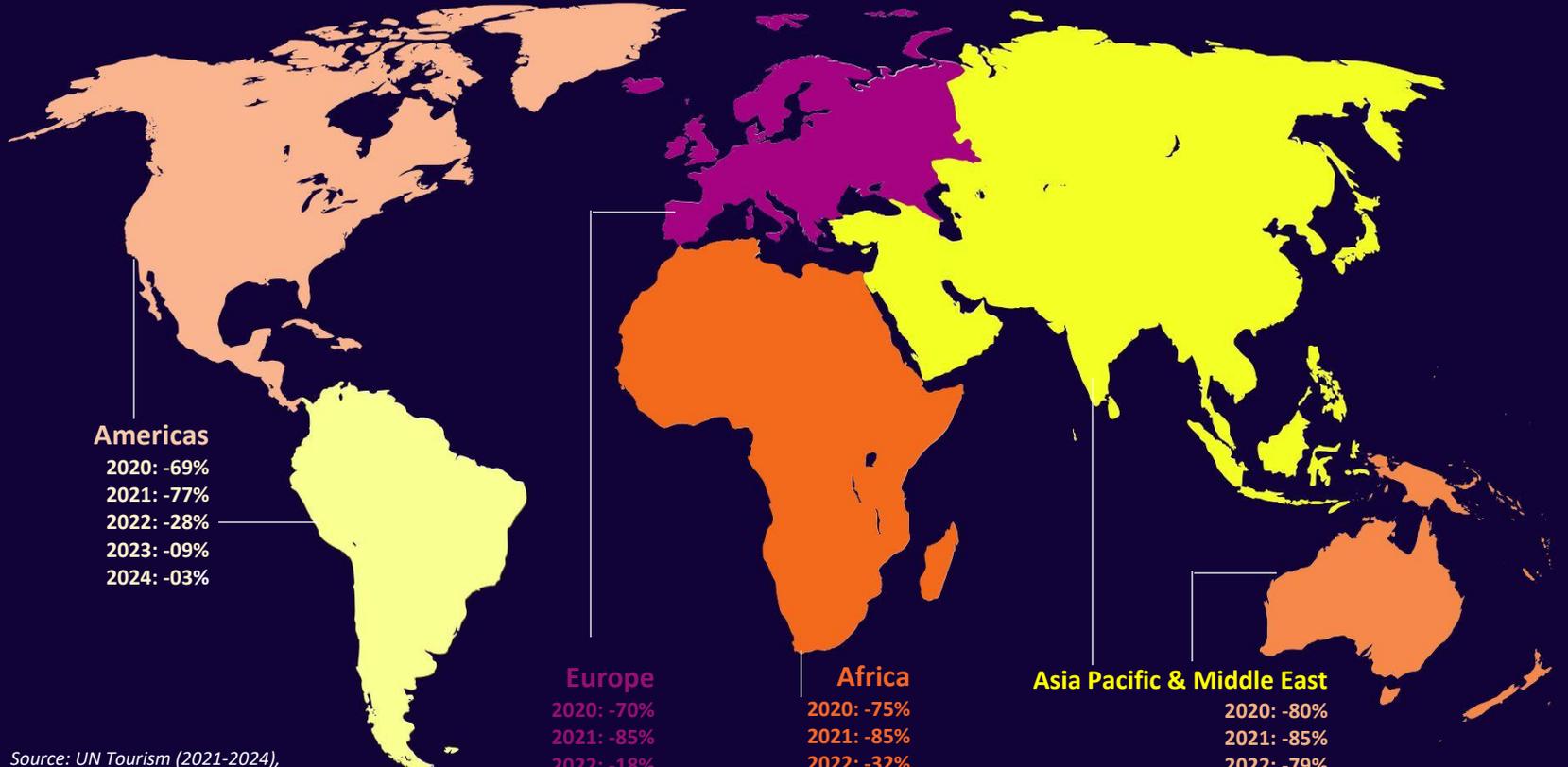
**World**

2020: -74%  
 2021: -69%  
 2022: -33%  
 2023: -11%  
 2024: -01%

**Lesotho**

2020: -71%  
 2021: -76%  
 2022: -53%  
 2023: -36%  
 2024: -16%

*Asia Pacific and the Middle East, Africa and Europe were on the lead in 2024. These regions surpassed the pre-pandemic international arrivals levels, which was a milestone for global tourism recovery. America was lagging behind the pre-pandemic levels by 03.0%.*



**Americas**

2020: -69%  
 2021: -77%  
 2022: -28%  
 2023: -09%  
 2024: -03%

**Europe**

2020: -70%  
 2021: -85%  
 2022: -18%  
 2023: -05%  
 2024: 01%

**Africa**

2020: -75%  
 2021: -85%  
 2022: -32%  
 2023: -04%  
 2024: 07%

**Asia Pacific & Middle East**

2020: -80%  
 2021: -85%  
 2022: -79%  
 2023: -04%  
 2024: 19%

Source: UN Tourism (2021-2024),  
 World Tourism Barometers

## INTERNATIONAL ARRIVALS BY COUNTRY OF RESIDENCE

Figure 1: International arrivals  
Arrivals 2024

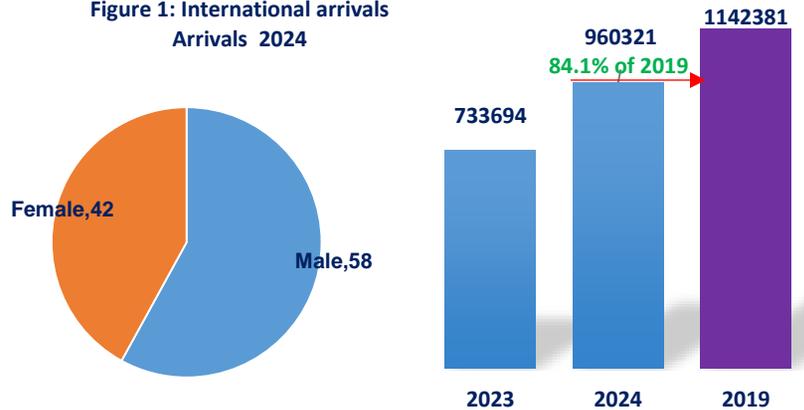
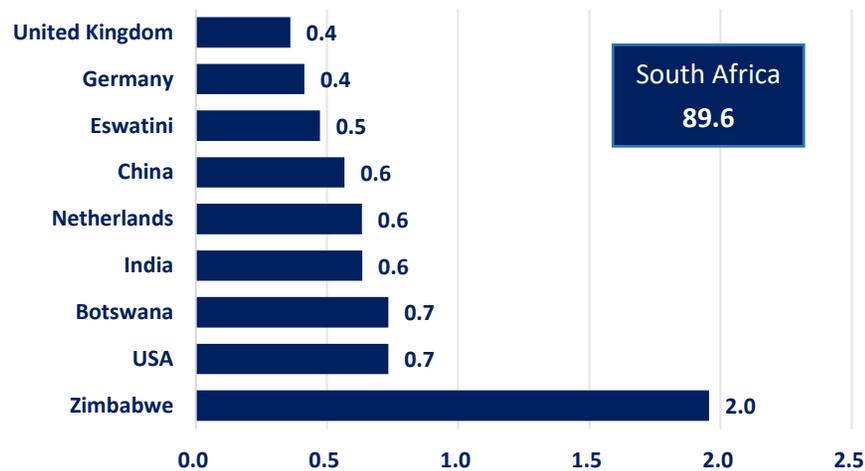


Figure 1 indicates that:

- The total international arrivals in 2024 was 960 321, representing 84.1% of pre-pandemic level (2019) and an increase of 30.9% as compared to 2023
- Males constituted the majority of international arrivals, representing 58% of the total.
- Females comprised a smaller proportion of the international arrivals accounting for 42% of the total.

Figure 2 reveals that:

Figure 2: % of arrivals from top 10 Source Markets 2024



- South Africa maintained its dominant position of being the key source market, contributing a substantial 89.6% to the total international arrivals, which is the same as in 2023.
- Following South Africa, Zimbabwe emerged as the second largest key source market, accounting for 2.0% of the total international arrivals.
- Among the overseas markets, USA (0.7%) led as the primary source market, followed by India (0.6%), Netherlands (0.6%), China(0.6%),Germany and the United Kingdom(0.4%) respectively.
- South Africa (89.6%), Zimbabwe (2.0%), Botswana (0.7%), and Eswatini (0.5%) constituted Lesotho's regional source markets, together representing 92.8% of all the international arrivals.

## INTERNATIONAL ARRIVALS BY CONTINENT

Figure 3: Arrivals by Continent of Origin 2024

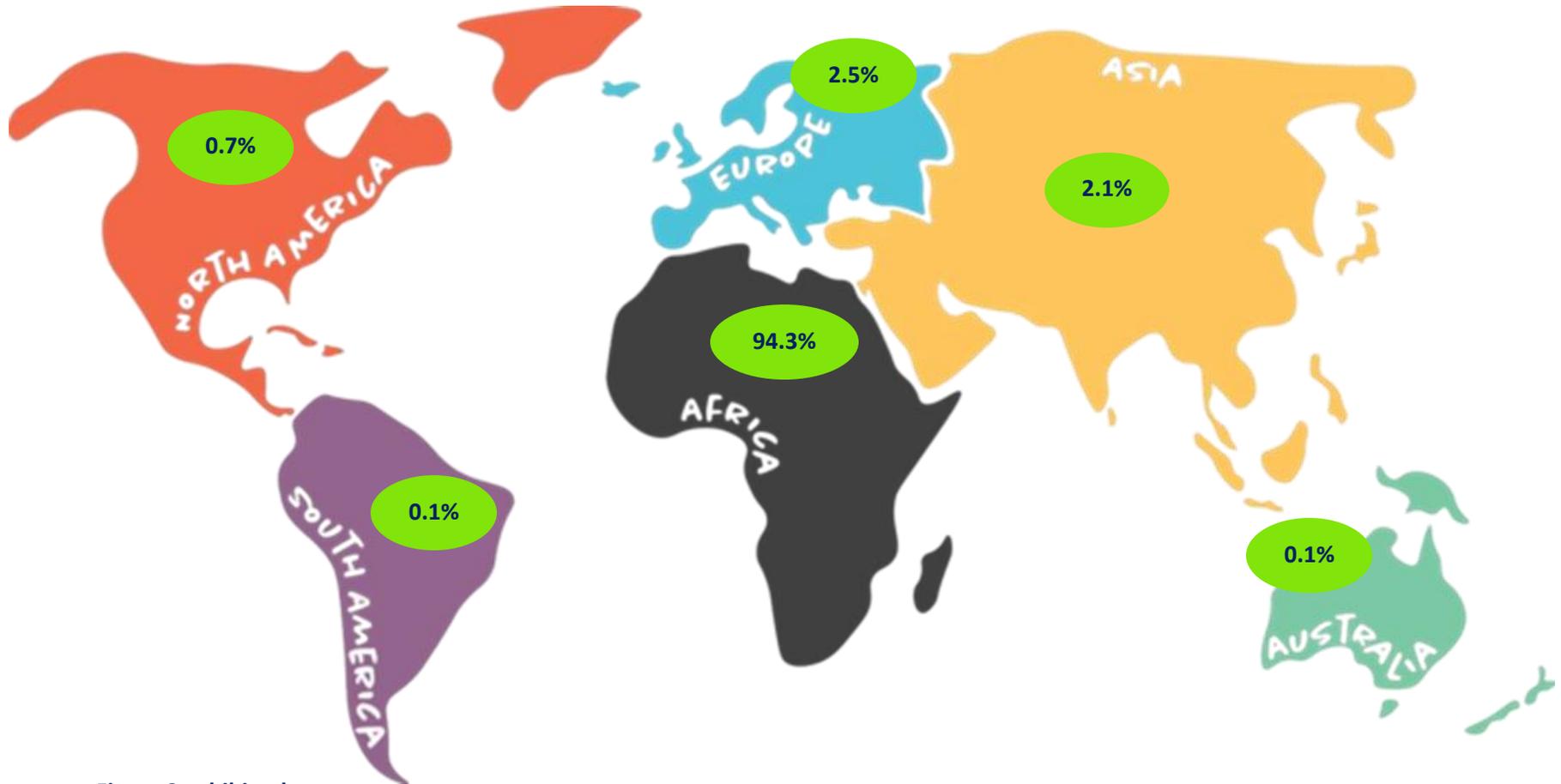


Figure 3 exhibits that:

- Africa constituted the majority of arrivals, accounting for 94.3% of the total arrivals indicating a strong reliance on the African and regional tourism markets.
- With smaller yet significant contributions, Europe and Asia followed, contributing 2.5% and 2.1% of arrivals respectively.
- North America contributed a minor share of 0.7% to the total arrivals.
- Australia and South America were the least contributors, each accounting for 0.1%.

## INTERNATIONAL ARRIVALS MONTHS AND YEARS

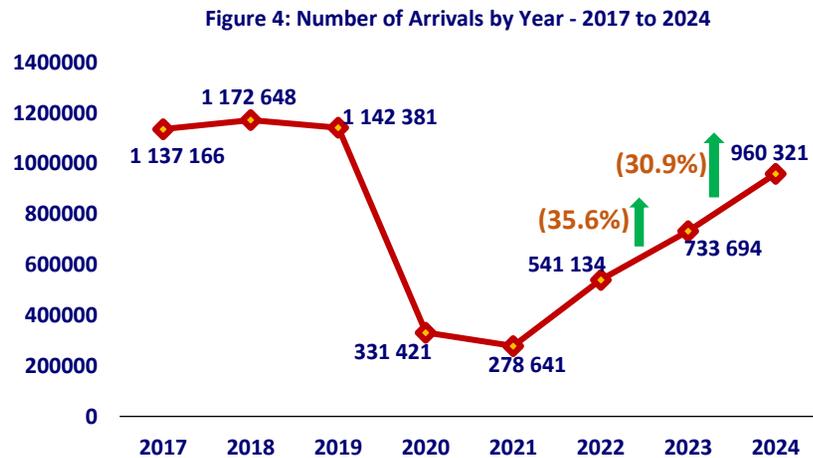


Figure 4 indicates that:

- In 2024, the total number of arrivals reached 960,361, demonstrating a substantial growth of 30.9% compared to the previous year.
- Furthermore, with 960,361 arrivals, 2024 demonstrated a strong recovery, reaching 84% of the pre-pandemic arrivals recorded in 2019 which is a significant milestone.
- While the 2024 growth is positive and significant, it's worth noting that the 30.9% growth rate is slightly lower than the 35.6% growth rate from 2022 to 2023.
- The graph indicates that Lesotho's tourism sector has maintained a strong positive trajectory in 2024, building on the significant growth of the preceding years (2022 and 2023).



Figure 5: International Arrivals by month

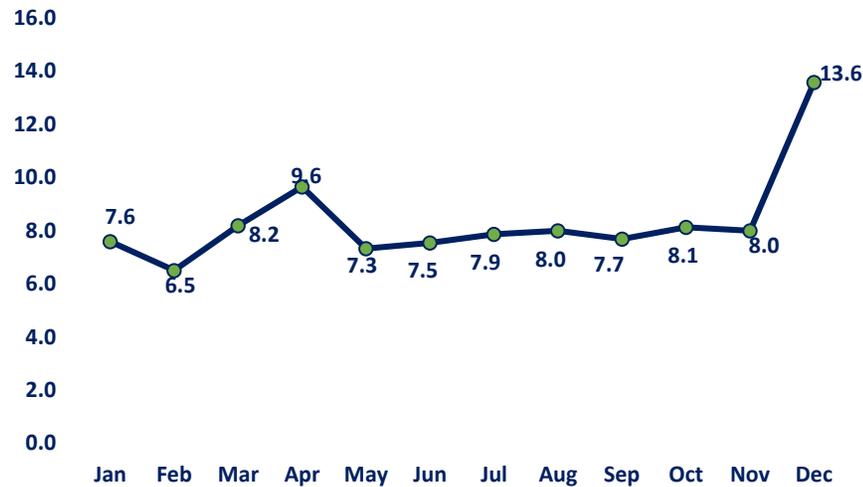
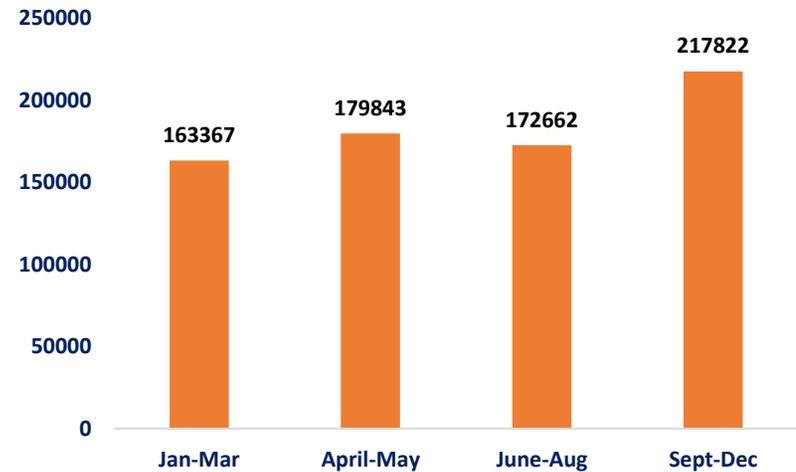


Figure 5 illustrates that:

- 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 6: Arrivals by Quarter

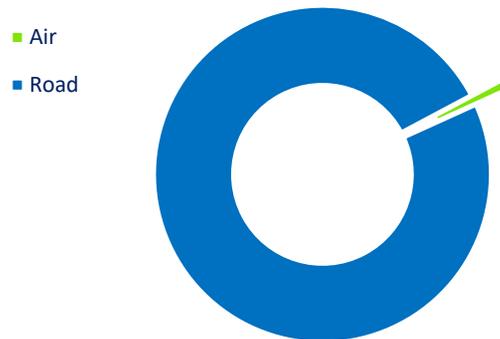


Quarterly analysis in Figure 6 shows that:

- The first quarter (Jan-Mar) saw 163,367 arrivals, contributing 22.3% to the annual total.
- The second quarter (April-May) 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.

## INTERNATIONAL ARRIVALS BY MODE OF TRANSPORT AND PORT OF ENTRY

Figure 7: % Arrivals by Mode of Transport 2024



**Figure 7 reveals that:**

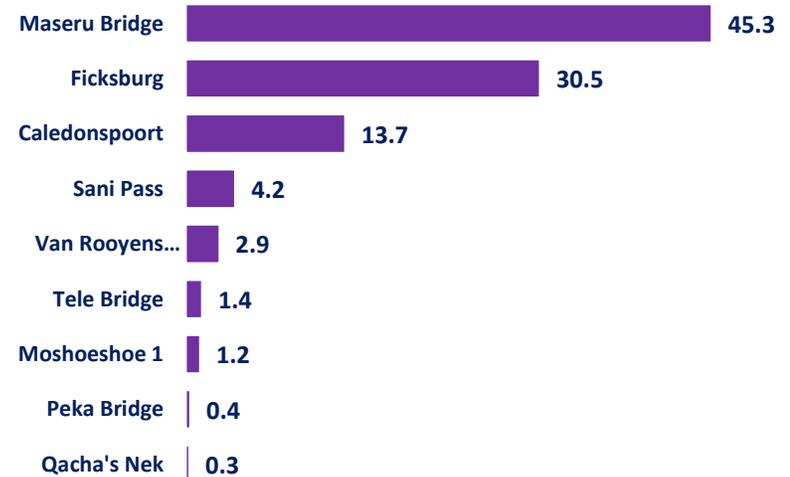
- Road transport accounted for the vast majority (99.0%) of the transport share.
- Moshoeshoe I International Airport represented a small fraction (1.1%) of the total transport share.
- There was a significant disparity in transport mode usage, with road travel being dominant.

**Figure 8 displays that:**

- Maseru Bridge was the primary entry for Lesotho’s visitors, possibly due to the fact that it is the capital city, Maseru.
- Ficksburg (30.5%) stood out as the second most frequented border facilitating arrivals for both tourism and business.

- Caledonspoort as the third of those frequently used borders, was predominantly a key entry point for tourists heading into the scenic highlands of Lesotho as well as business travelers.
- Despite its smaller share (4.2%), Sani Pass represented a crucial entry point for tourists, attracting travelers seeking both adventure and cultural experiences.

Figure 8: Arrivals by border



## INTERNATIONAL ARRIVALS BY PURPOSE OF VISIT AND LENGTH OF STAY

Figure 9: Arrivals (%) Purpose of Visit 2024

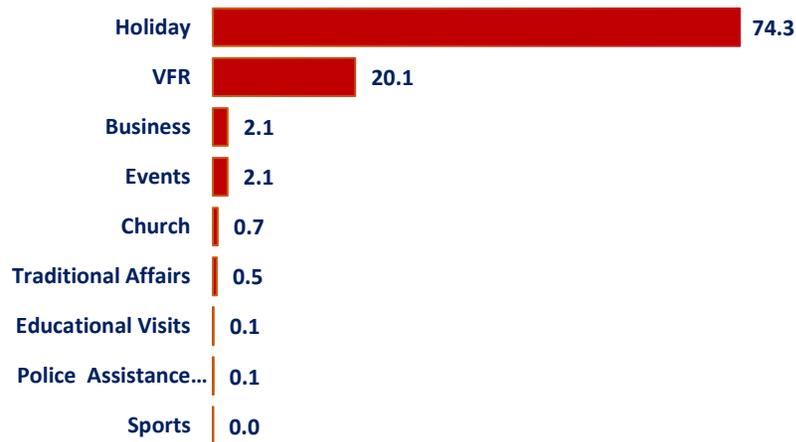


Figure 9 shows that:

- With 74.3% of all arrivals attributed to holidays, leisure travel stood out as the primary driver of tourism to Lesotho.
- Contributing a substantial 20.1%, Visiting Friends and Relatives (VFR) was the second most frequent purpose of visit, a trend that is likely amplified by the close proximity and high volume of arrivals from neighboring South Africa.
- Business travel and visits for Events (particularly the Roof of Africa & Maletsunyane Braai Festival) each accounted for a smaller share of 2.1% of the total arrivals.
- Though even smaller, Lesotho's religious (0.7%) and traditional (0.5%) tourism, represented promising niche markets that probably deserve more focus for purposes of sustainable tourism development and future growth.

Figure 10: Arrivals (%) by Length of Stay 2024

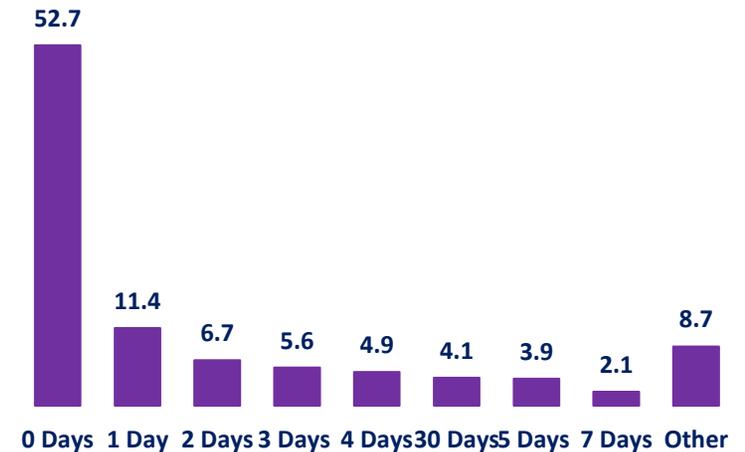


Figure 10 shows that:

- Over half of the arrivals (52.7%) were same-day visitors, suggesting a strong flow of day trip excursions, particularly to Sani Pass.
- Following the significant number of day trippers, the 11.4% of arrivals staying for just one day further emphasizes Lesotho's appeal for short visits.
- Furthermore from the graph it is evident that the 4.1% of arrivals staying for 30 days likely reflects extended VFR travel, possibly influenced by the 30-day visa often granted by neighboring South Africa.
- Lastly, it is evident that Lesotho visitor profile is heavily skewed towards very short stays (0-4 days) making it a prime destination for quick getaways.

## INTERNATIONAL ARRIVALS BY LENGTH OF STAY

Table 1: Arrivals by Purpose of Visit and Length of Stay (%)							
Purpose of Visit	Length Of Stay in Nights						Total
	Day Trip	1	2	3	4	5+	
Business	0.08	10.6	3.9	2.1	0.7	2.2	2.0
Church/Religious	0.0	1.0	1.0	1.0	3.0	1.0	1.0
Academic	0.0	0.0	0.0	1.0	0.0	0.0	0.0
Attend an Event	0.0	1.0	0.0	5.0	9.0	6.0	2.0
Holiday	99.8	46.0	60.0	60.0	60.0	33.0	74.0
Police Station Visits	0.0	1.0	0.0	0.0	0.0	0.0	0.0
Sports	0.0	0.0	0.0	0.0	1.0	0.0	0.0
Traditional Affairs	0.0	2.0	0.0	1.0	1.0	1.0	1.0
Visiting Friends & Relatives	0.02	40.0	34.0	29.0	25	56.0	20.0

Table 1 shows that:

- Holiday makers accounted for the majority of visitors (74%). A significant proportion of 20% visited Friends and Family.
- Business visits were concentrated in the 1-day category (10.6%), with a smaller percentage staying for 2 or 3 days.
- **There is a strong trend towards very short stays in Lesotho across the different purpose of visits.**

Table 2: Arrivals by Destination Visited and Length of Stay (%)									
Destination	Length of Stay in Nights								Total
	Day Trip	1	2	3	4	5	7	8-30	
Sani Pass	92.4	4.0	1.9	0.6	0.4	0.2	0.2	0.2	100
Sehlabathebe	0.0	17.6	18.5	8.6	17.6	11.6	3.9	22.2	100
Katse Dam	20.4	16.4	16.9	2.7	11.6	11.1	10.7	10.2	100
Maliba Lodge	2.7	4.9	14.7	12.9	41.1	15.2	1.3	7.1	100
Malealea	0.0	9.8	13.0	44.6	2.2	10.9	6.5	13.0	100
Afri-Ski	3.6	51.8	15.7	9.6	7.2	4.8	0.0	7.2	100
Semonkong	1.2	6.8	9.2	21.1	16.7	16.0	3.2	25.7	100
Ramabanta	0.0	0.0	0.0	12.9	9.7	3.2	0.0	74.2	100
Thaba-Bosiu	0.0	33.3	0.0	9.5	14.3	19.0	0.0	23.8	100

Table 2 indicates that:

- Holiday makers accounted for the majority of visitors (74%). A significant proportion of 20% visited Friends and Family.
- Business visits were concentrated in the 1-day category (10.6%), with a smaller percentage staying for 2 or 3 days.
- **There is a strong trend towards very short stays in Lesotho across the different purpose of visits.**

Figure 11: Arrivals (%) by destinations across the country 2024

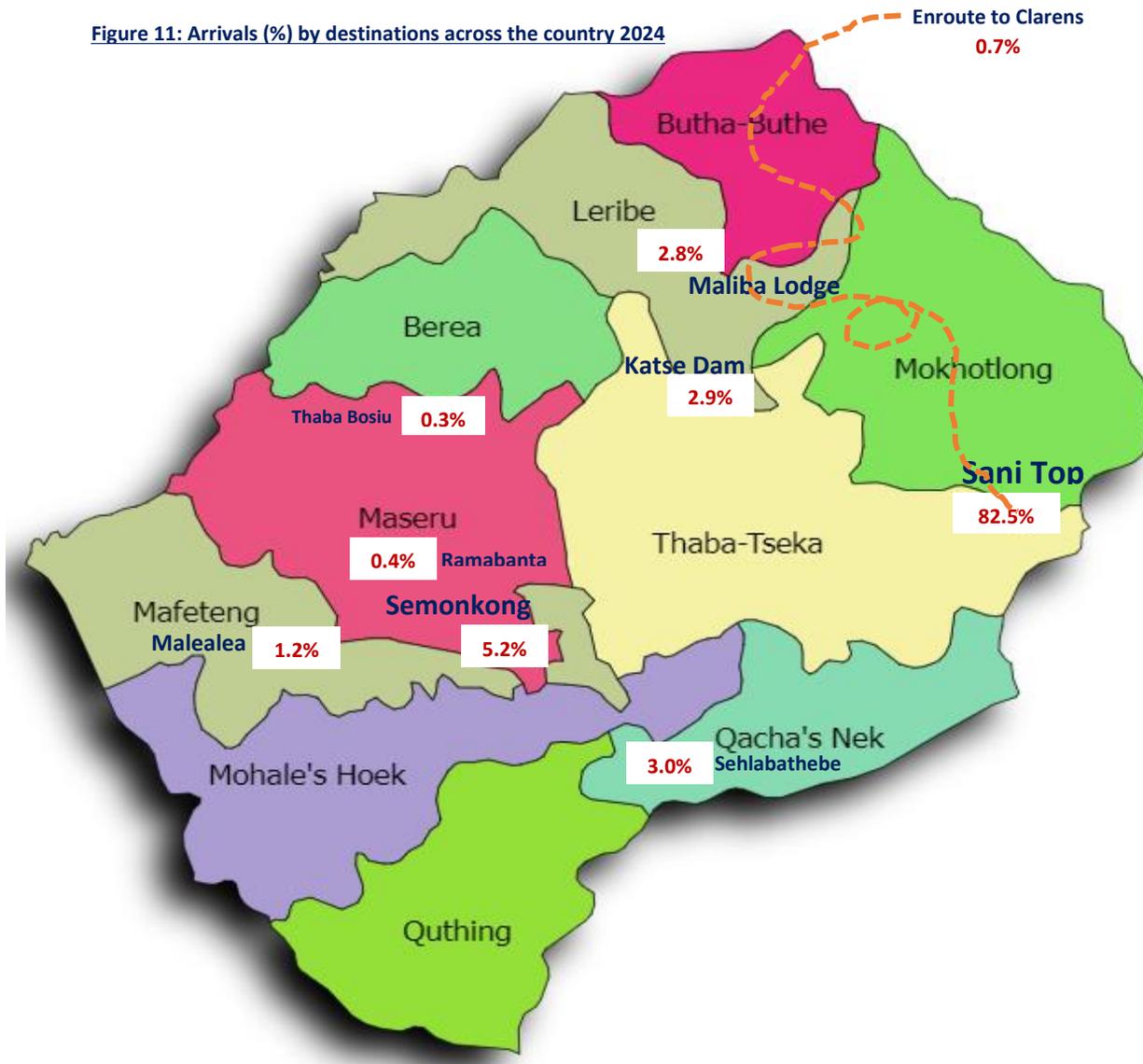


Figure 11 shows that:

- Sani Pass was the most popular destination, constituting 82.5% of the visits to Lesotho.
- Semongkong (5.2%) followed as the second most popular place of interest possibly due to the iconic Maletsunyane Falls.
- Sehlabathebe (3.0%), Katse Dam (2.9%) and Maliba (2.8%) also followed closely, exhibiting a similar level of interest.
- Malealea (1.2%) and Afriski (1.1%) represented smaller proportions of visits, indicating a lower level of popularity compared to other key destinations.
- Enroute to Clarens with 0.7% of the visits (suggesting a transit flow of tourists from Sani Pass into Clarens, Ramabanta (0.4%), and Thaba-Bosiu (0.3%)) showed the least observed interest to Lesotho.

Figure 12: Destinations visited at Sani Top 2024

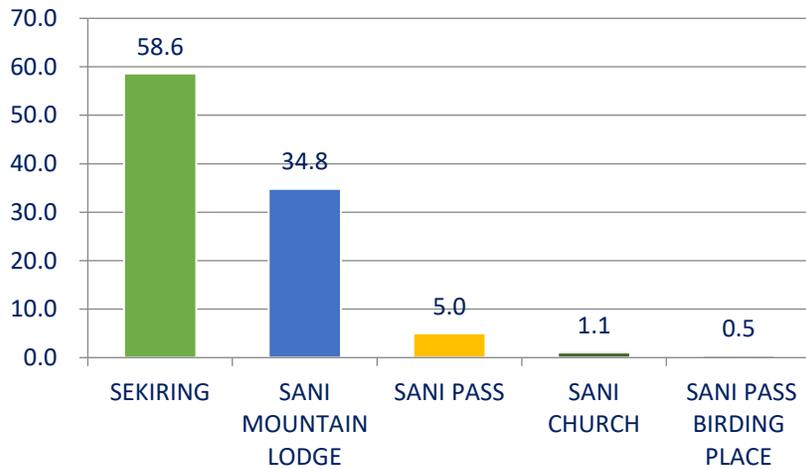


Figure 12 delves deeper to show that:

- Sekiring (59%) was the primary point of engagement at Sani Pass, indicating a strong tourist interest in the Basotho culture as well as their way of life.
- Sani Mountain Lodge (35%) was a significant point of interest, notably housing the "Highest Pub in Africa," making it a key stop and experience for many day visitors.
- The iconic Sani Pass (5%) and its panoramic views still served as a distinct, albeit less dominant, primary attraction for some visitors.
- Despite lower figures, Sani Pass attracted niche tourists that were drawn to the church in the area (1%) and different bird species(0.5%).



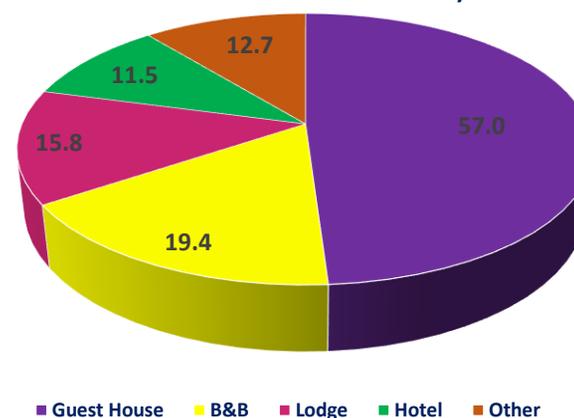
# ACCOMMODATION CAPACITY, DEMAND EMPLOYMENT, REVENUE & SERVICES

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

- 192 establishments were covered in the survey, representing 81.0% response rate.
- More than half (57.0% of all facilities covered in the survey were guest houses. This is because there are more Guest Houses than other types of establishments across the country.
- The proportion of hotels, lodges and B&Bs covered were 11.5%, 12.7% and 19.4% respectively. Other types including conference centers, chalets, homestays and institutions made up 9.7%.

Figure 13: Distribution (%) of Accommodation Establishments Covered in the Survey - 2024



**Figure 14: Number of accommdation Establishments covered by District - 2024**

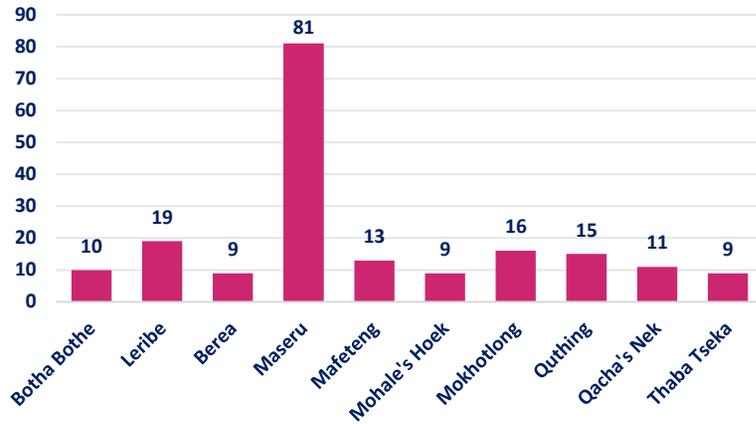


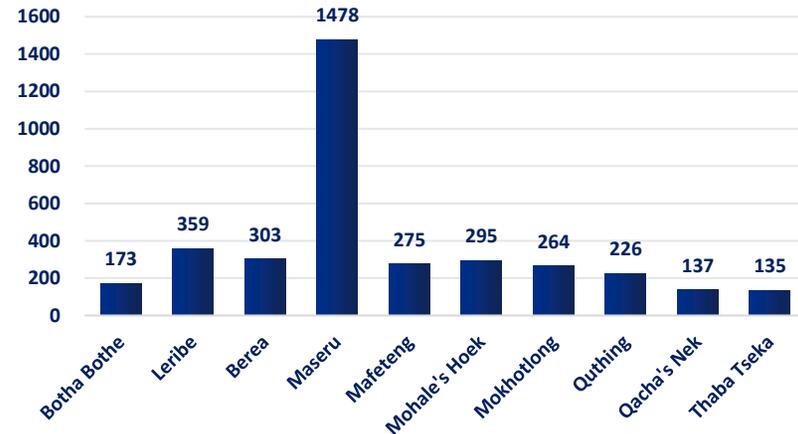
Figure 14 illustrates the distribution of establishments by district.

- By virtue of being the capital city, Maseru have more accommodation establishments, hence more (81) were covered from Maseru, making up 42.2% of all establishments covered across all districts.
- Significant numbers were also covered from Botha Bothe, Leribe, Mokhotlong, Mafeteng, Qacha's nek and Quthing.

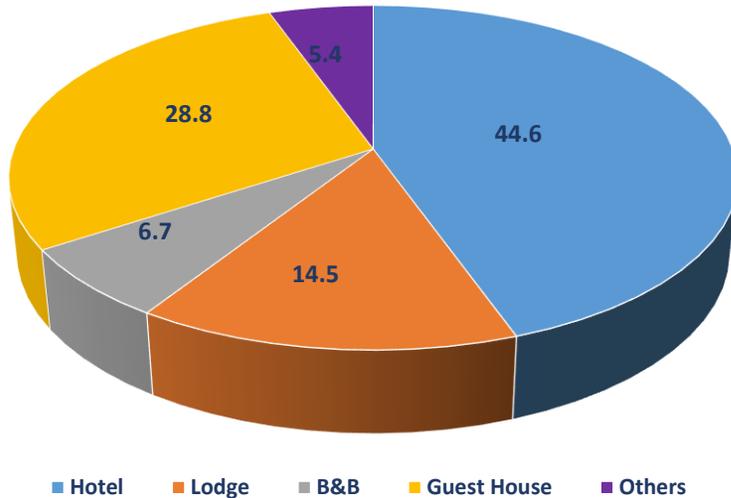
Figure 15 below illustrates district capacity in terms of rooms.

- Due to the majority of establishments being clustered in Maseru, Maseru had a higher room capacity.
- Maseru had more room capacity of 1478 rooms, representing 40.5% 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 15: Number of Rooms by District - 2024**



**Figure 16: Distribution (%) of Rooms by Type of Establishment**



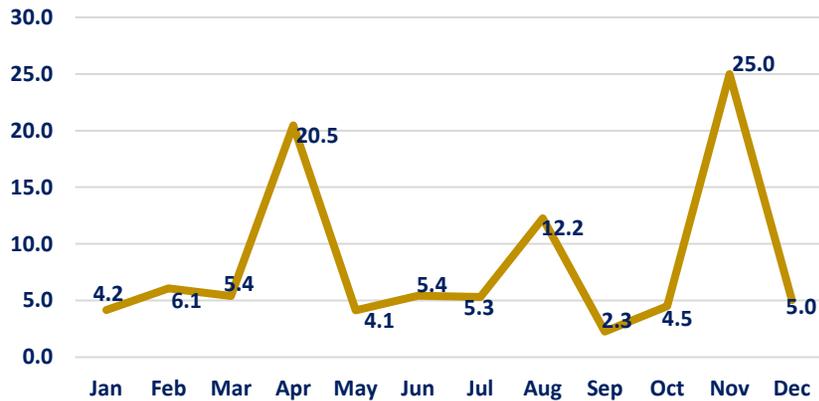
Analysis of stocks of accommodation by type in Figure 16 depicts that:

- Hotels had the highest room capacity, 44.6%.
- Guest Houses ranked second with room capacity rate of 28.8%. 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 5.4% of the total rooms.



## BED CAPACITY, BED OCCUPANCY AND GUEST NIGHTS

Figure 17: Guest Nights (%) by Month - 2023



The pattern of demand for accommodation in 2024 as presented in figure 17 shows that:

- The number of guests' nights fluctuated across the month of 2024, indicating a fluctuating trend on demand for accommodation with peaks observed in April and November (highest).
- The lowest demand of 2.3%, was observed in September, followed by May with 4.1%, January with 4.2%. Against what one can expect due to the high number of arrivals registered in the month of December, the number of guest nights in the same month dropped to 5.0%. This was due to the fact that the majority of visitors welcomed in the country at this time of the year were mainly visiting friends and relatives, thus there was limited demand for accommodation.

Figure 18: Guest Nights (%) by Districts - 2024

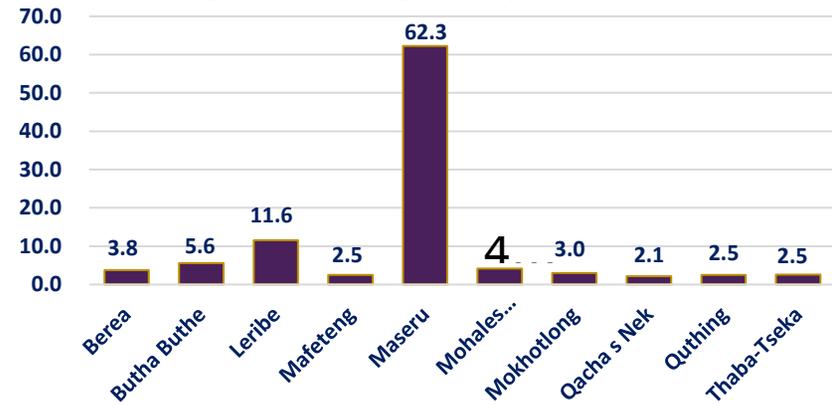


Figure 18 further shows that:

- Maseru saw the highest demand for accommodation, registering 62.3% of total guests, followed by Leribe, Botha Buthe and Mochale's Hoek with 11.6%, 5.6% and 4.2% respectively. Quthing registered the lowest number of guests accounting for 2.1% of the total guests.

Analysis by type of establishment in figure 19 below illustrates that:

- Guest Houses registered the highest demand of 64.1% of total guests. Hotels followed with 21.6%. On the third position came lodges with 6.2% and B&Bs registered 6.1% on the fourth position. Other types accounted for 2.0%. Generally this pattern could mean that guests preferred to use guest houses than any other types of facilities, or that the demand for guest houses is driven by the fact that there actually more guest houses across the country than other types.

Figure 19: Guest Nights (%) by Type of Establishment - 2024

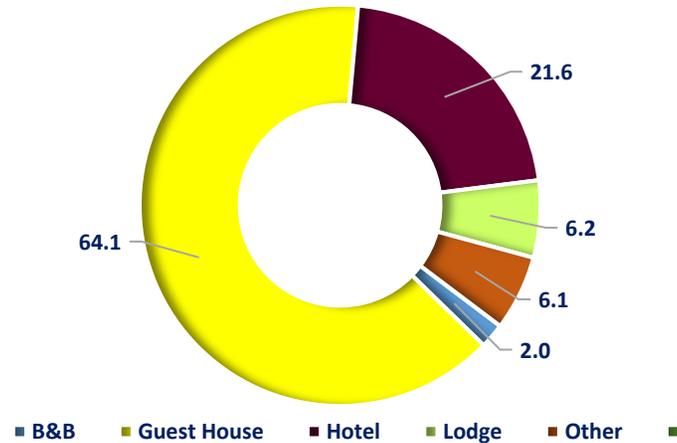


Figure 21: Bed Occupancy Rates by Type of Establishment - 2024

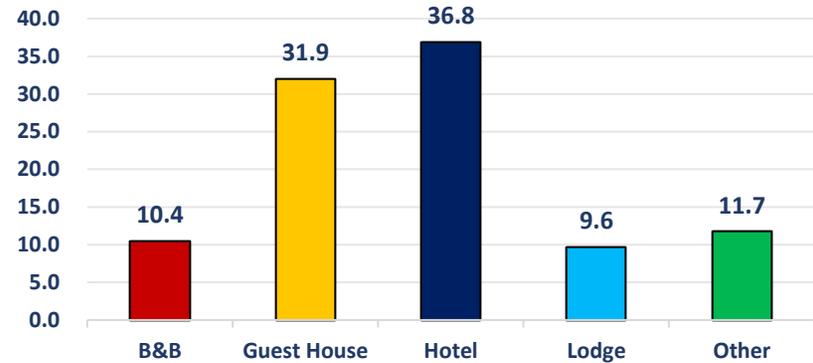
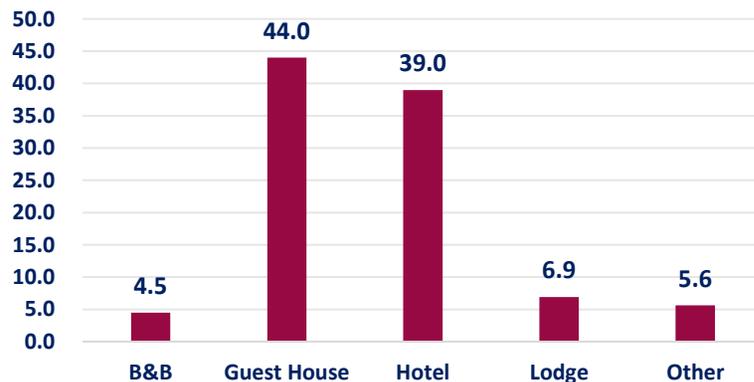


Figure 20: Number of Beds by Type of Establishment - 2024



Analysis of bed capacity in figure 20 shows that:

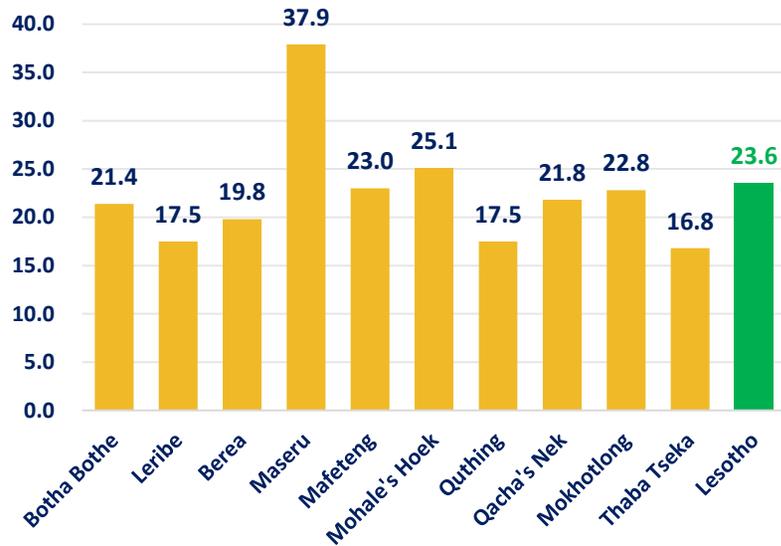
- The guest houses registered more beds (44.0%) than other types of establishments followed by hotels with 39.0%, lodges with 6.9% then by Other types with 5.6% while B&B facilities accounted for the least proportion (4.5%) of the total beds.

AT WHAT RATE WERE THE BEDS USED?

Figure 21 presents Bed occupancy rates by type of establishment. It indicates that:

- Hotel beds experienced the highest occupancy, registering bed occupancy rate of 36.8% followed by guest houses with 31.9%.
- Lodges and B&Bs saw rather lower bed occupancy of 10.4% and 9.6% respectively.
- Overall, bed occupancy rate was 23.6% in 2024, representing a significant 3.7% increase as compared to 2023.

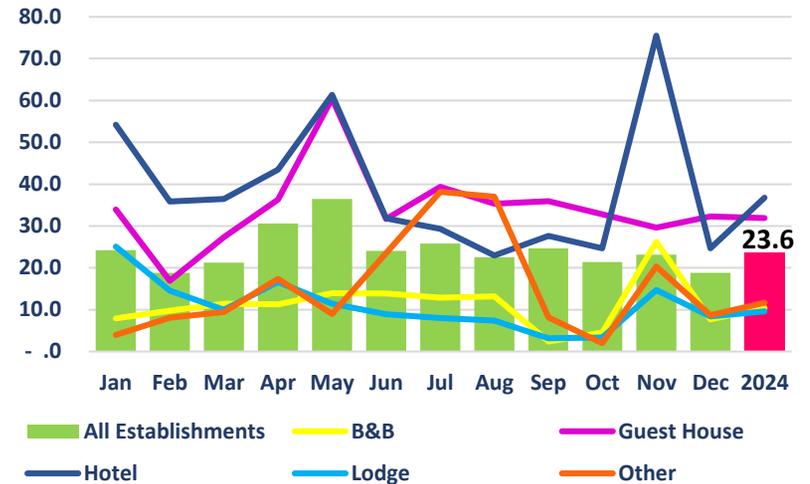
Figure 22: Bed Occupancy rates (%) by District - 2024



Analysis of bed occupancy by district in figure 22 depicts that:

- Maseru experienced the highest bed occupancy of 37.9%.
- Mohale's Hoek, Mafeteng, Mokhotlong, Qacha's Nek, Botha Bothe and Berea followed with 25.1%, 23.0%, 22.8%, 21.8%, 21.4% and 19.8% respectively.
- Thaba Tseka registered the lowest bed occupancy of 16.8%.
- Overall, the bed occupancy was 23.6%. This represented a notable 3.7% increase as compared to 2023 where the bed occupancy was 19.9%. This notable growth may be attributed to the growth in the major tourism events observed in 2024 and the fact that a reasonable amount of snow was experienced, thus more visitors came to experience the snow.

Figure 23: Bed Occupancy Rates by Month and Type of Establishments - 2024



- The overall bed occupancy fluctuated across the months with peaks in January, April, May, July and September.
- The observed peaks can be attributed to Easter holidays, increased travel due to snow chasing by visitors, sectorial events which were largely clustered in the last four months of the year.
- Hotels and guest houses registered the highest (significantly higher than the total rates) bed occupancy rates throughout the year with fluctuations across the months. Notable hikes were observed in May for both types and in November for hotels, B&Bs, Lodges and other types of establishment. This pattern speaks to our marketing efforts, which need to focus on addressing the observed issue of seasonality, whereat some months register very low occupancy rates.

## REVENUE ACCRUED FROM ACCOMMODATION SUB-SECTOR

Figure 24: % Share of Revenue Across Type of Establishment - 2024

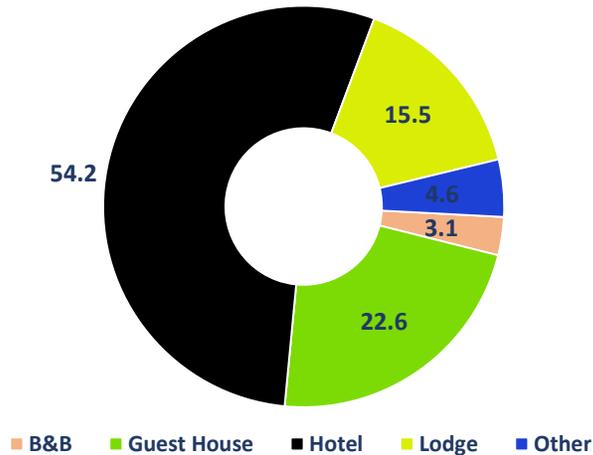
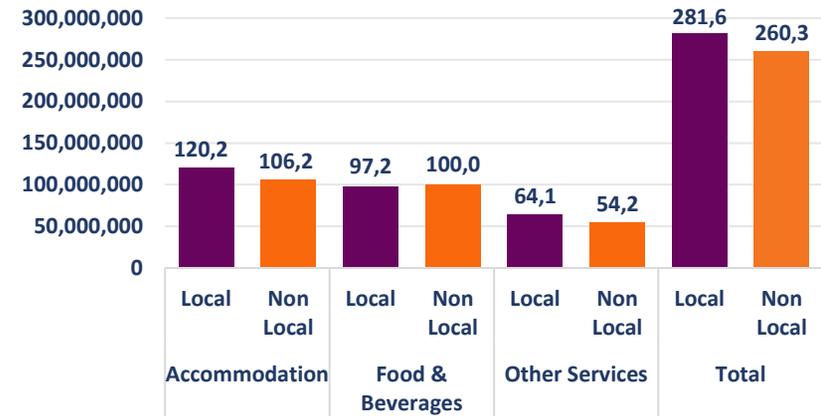


Figure 24 above shows that:

- The greater proportion of revenue (54.2%) was generated from hotel services.
- 22.6% of the revenue was accrued from Guest Houses and 15.5% from Lodges.
- Other types of accommodation establishments generated 4.6% of the total revenue while B&Bs made only 3.1%.

Figure 25: Revenue (Million) by Type of Residence and Spending - 2024



Analysis of type of spending by residence in figure 25 depicts that:

- Inbound tourists (Non-Locals) spent less across all services as compared to domestic travelers.
- There is a notable improvement on revenue accrued from accommodation. In 2024 there was a marginal difference between revenue accrued from locals and non-locals on accommodation spending. Unlike in 2023 whereby revenue accrued from domestic travelers almost doubled that accrued from inbound tourists.

Figure 26: Revenue Accrued and Percentage Share by District - 2024

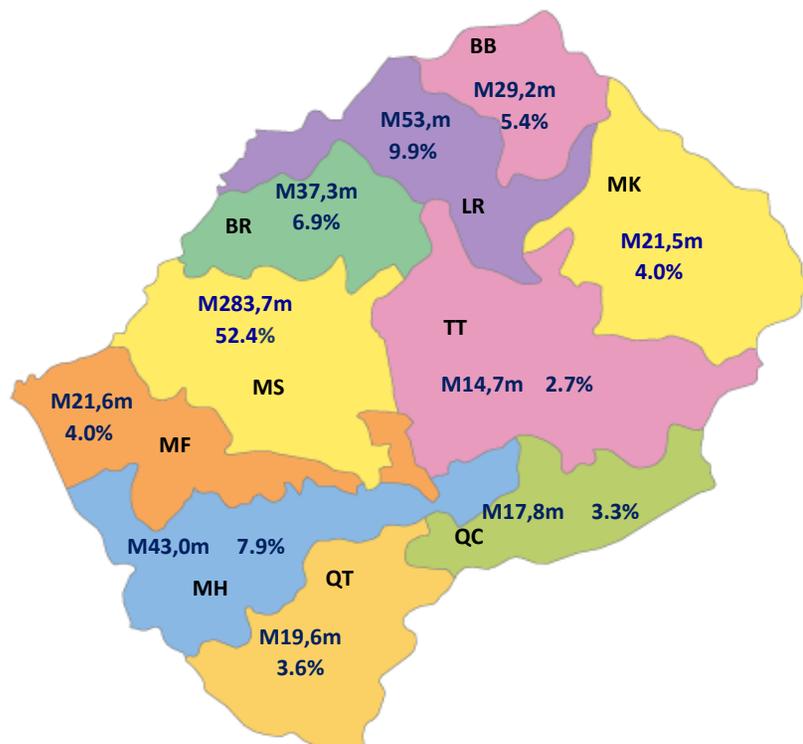


Figure 26 presents a comparison of revenue accrued across all districts, it shows that:

- Slightly more than half (52.4%) of the total revenue was generated in Maseru, followed by Leribe with 9.9% and Mhale's Hoek with 7.9% on the third position.
- Thaba Tseka accrued the lowest revenue, accounting for only 2.7% of the total revenue from the accommodation sub-sector.

Figure 27: Revenue Accrued (Million) by Type of Spending and Years - 2023/2024

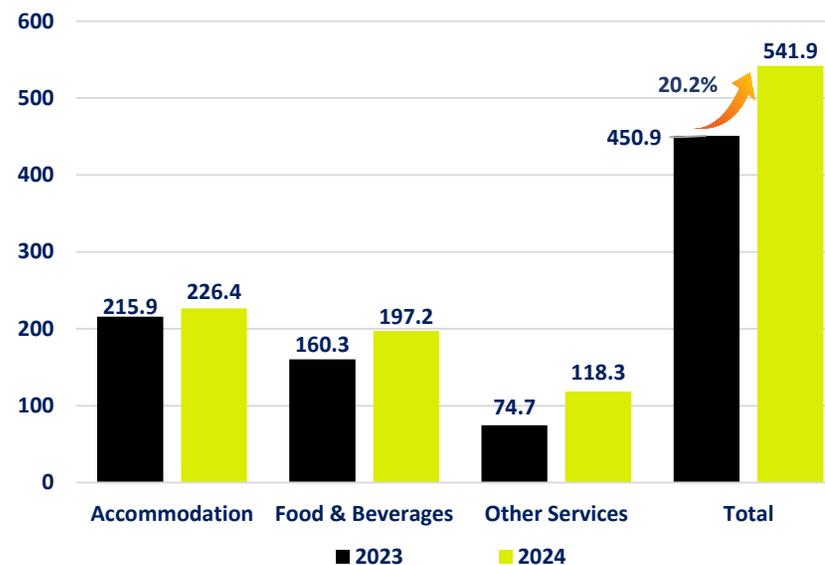
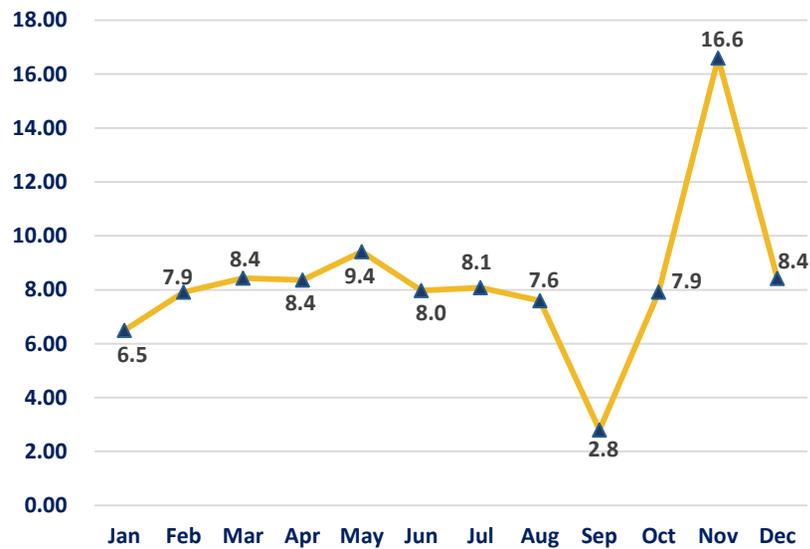


Figure 27 presents the distribution of revenue accrued by type of spending, comparing 2022 and 2023.

- Accommodation was the major service sold in the hospitality sector, with more revenue accrued from this service, while other services generated less revenue, for both 2022 and 2023.
- Overall, revenue increased by 20.2% in 2024 as compared to 2023. Even though there was an increase in revenue, the increase declined by 8.7 percentage points as compared to the increase between 2022 and 2023.

Figure 28: Revenue Accrued by Month - 2024



Analysis of revenue accrued over the months is presented in figure 28, which indicates that:

- Revenue accrued fluctuated between January and September, with a sharp drop in the month of September. Thereafter, a sharp increase was observed between September and November, followed by a drop in December.
- The month of November registered the highest revenue, which accounted for 16.6% of the total revenue. Events and holidays were the main contributors for the observed pattern. However, one could have expected a further rise in December since there were more arrivals. It turned out the majority of visitors Lesotho welcomes at this time of the year are mainly those visiting friends and relatives and may not have spent much on accommodation services.



## EMPLOYMENT IN THE ACCOMMODATION SECTOR

- The total number of employees in the accommodation sector was 2226 in 2024, representing 18.0% increase as compared to 2023.
- As usual, women made up the majority (57.8%) of the workforce in the accommodation sector as shown in figure 29.

According to analysis by districts in figure 30,

- As expected, since Maseru has more establishments, Maseru district hired the majority (29.5%) of employees within the accommodation sub-sector.
- Leribe, Berea, Mokhotlong and Mohale’s Hoek recorded notable numbers of employees as well.
- Thaba Tseka registered the least number of employees.

Figure 29: Employees by Sex (%) 2024

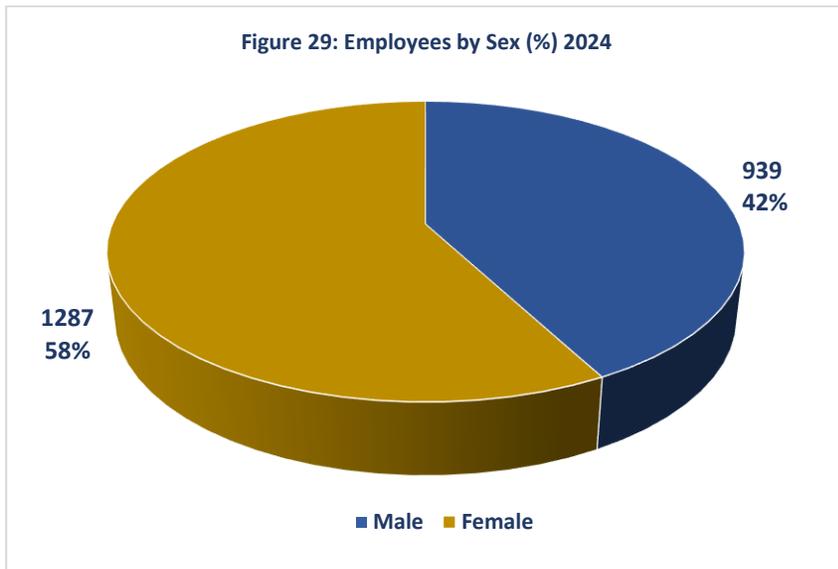


Figure 30: Distribution (%) of Employees by District - 2024

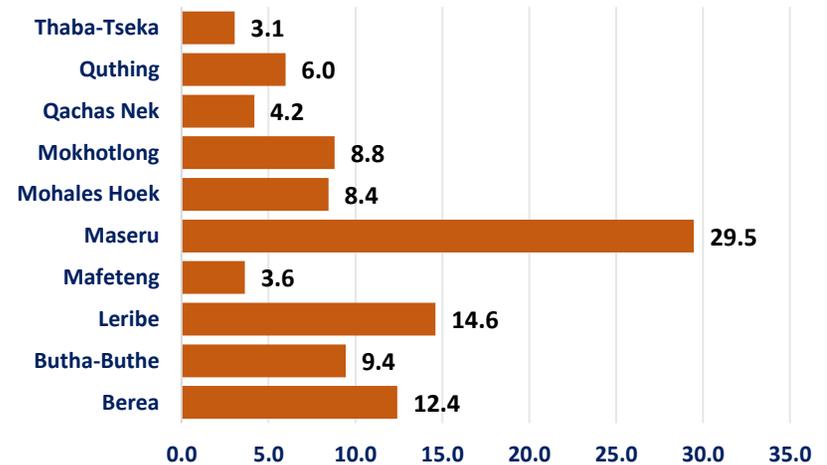


Figure 31: % of Skilled and Unskilled Employees - 2024

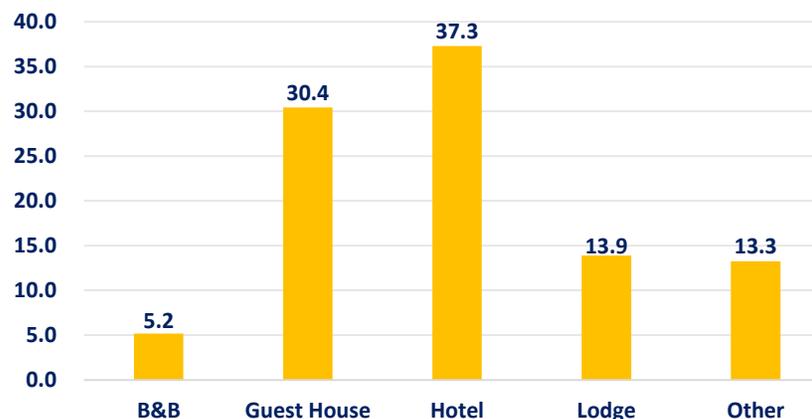


- Figure 31 depicts that, the skilled workforce in the accommodation sector added up to 78.8% against 21.2% of those who are not skilled in 2024. For both Females and males, the greater proportion were skilled (82.7% for females and 73.2% for males)
- Comparison by sex in figure 32 indicates that of the skilled workforce, the majority were females (61.9%) against 38.1% of males, while among the unskilled workforce, males were at the majority (51.9%).

Figure 32: Comparison of Workforce Skills by Sex - 2024



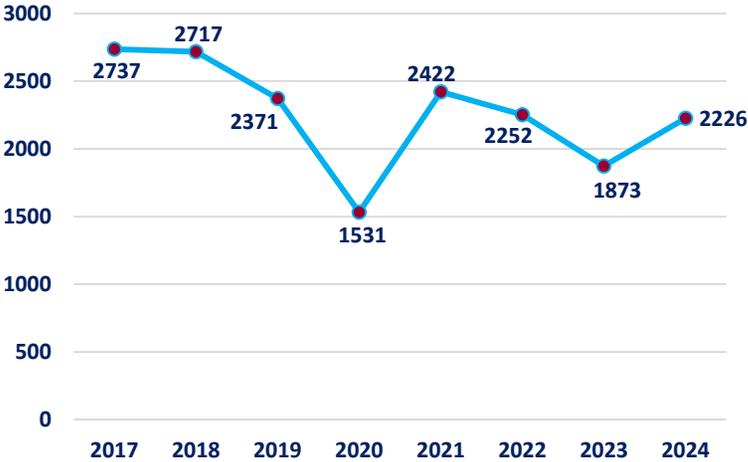
Figure 33: Employees (%) by Type of Establishment - 2024



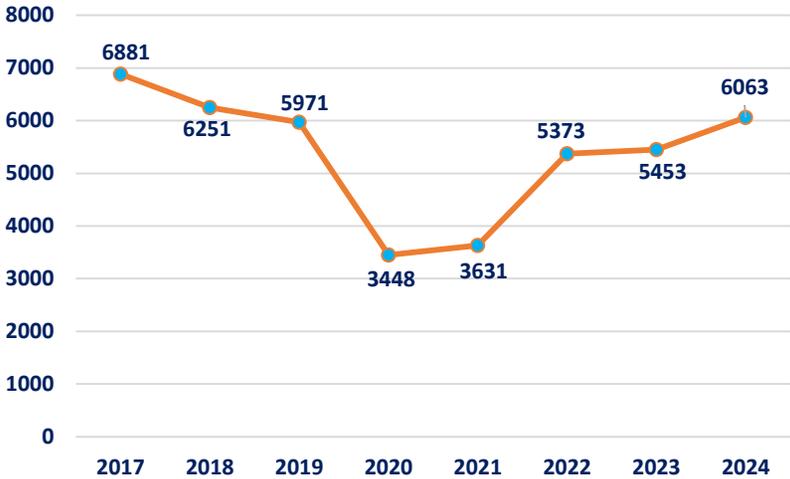
- Analysis illustrated in figure 33 shows that, Hotels were the major employers, followed by guest houses while B&Bs employed the least number of people.
- Lodges and Other types of accommodation establishments contributed fairly to the workforce of the sub-sector adding up to 13.9% and 13.3% respectively.
- The observed pattern of distribution of workers across types of establishment is in sync with analysis of usage of establishments in figure 19 and 23 on guest nights and bed occupancy which were rather high in hotels, guest houses, implying high demand for the workers to address the needs of visitors and maintain the required service standard.

**COMPARISON OF KEY VARIABLES OVER THE YEARS - 2017 -2024**

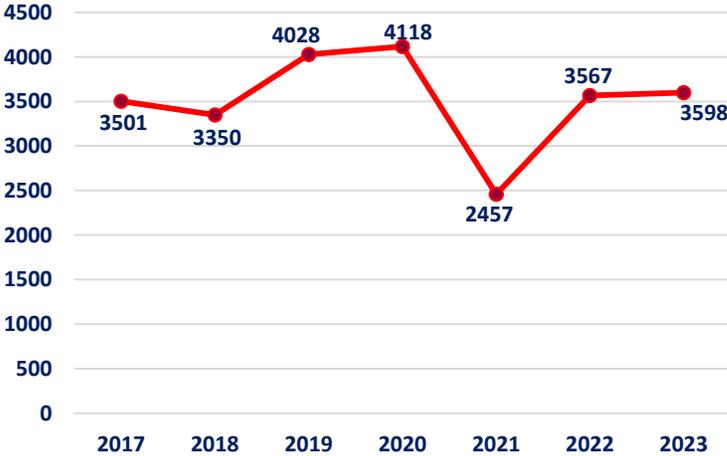
**Figure 34: Number of Employees in the Accommodation Sub-Sector 2017 - 2024**



**Figure 36: Number of Beds 2017 - 2024**



**Figure 35: Number of Rooms in the Accommodation Sub-Sector 2017 - 2024**



**Figure 37: Yearly Bed Occupancy Rates 2017 - 2024**

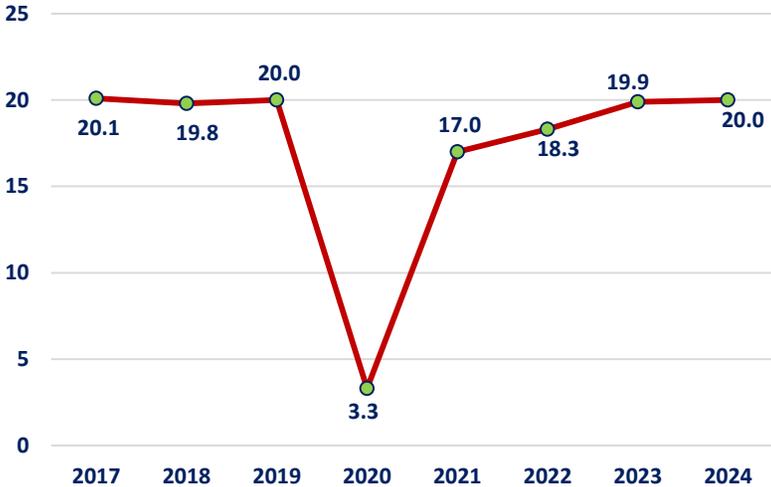
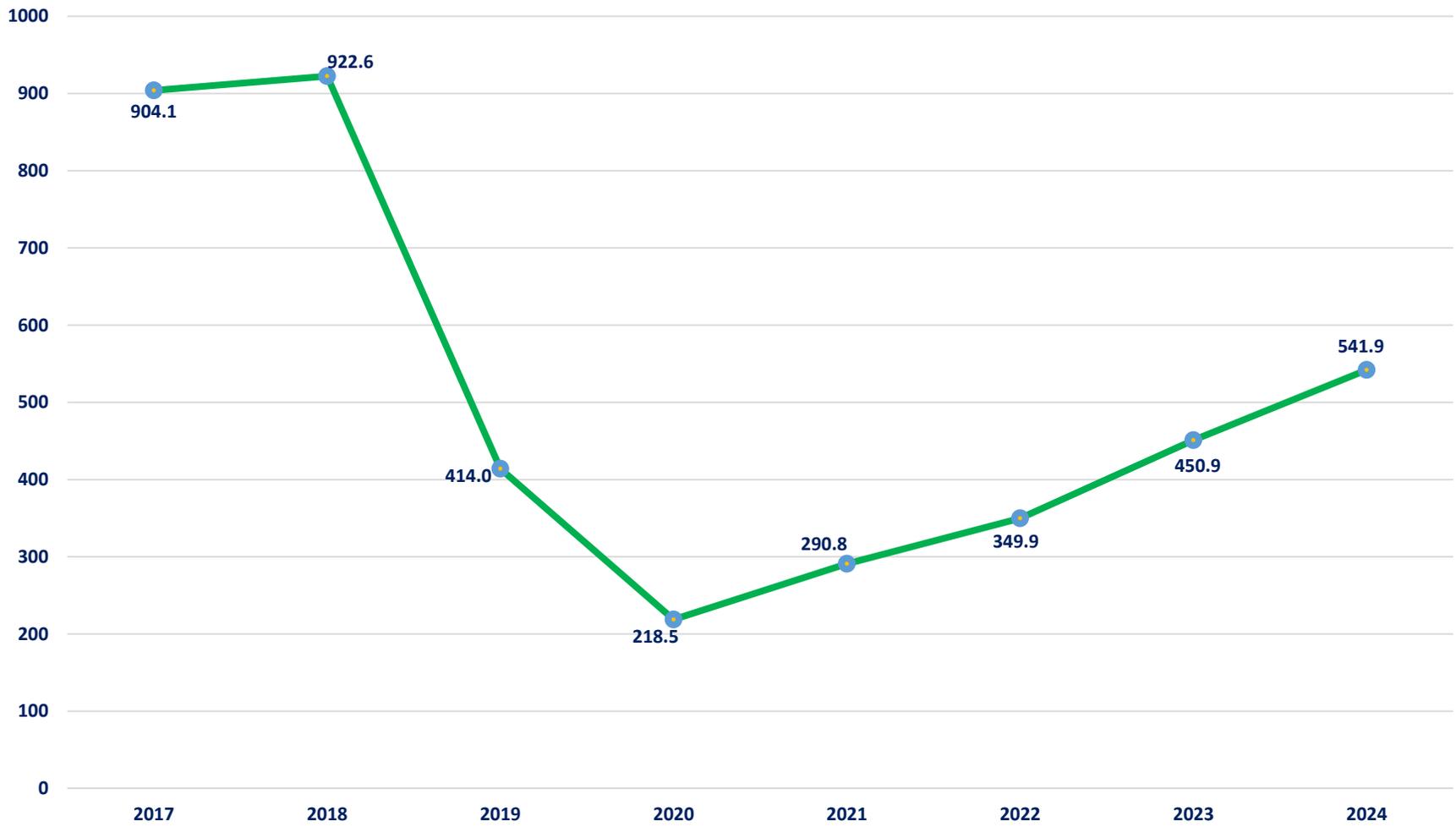


Figure 34: Revenue Accrued (Million) 2017 - 2024



## 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 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 30.9% increase as compared to 2023.

Analysis of tourists by country of residence, indicates that South Africa remained 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 be 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 China seem to be upcoming source markets with considerable number of arrivals recorded from each.

Relative to 2023, a significant growth of 20.2% in revenue accrued in the accommodation sector was noted. This was made possible by the increase in spending on accommodation relative to 2023. The results

also display that women made up the majority (57.8%) of the workforce in the accommodation sector as compared to males who accounted for 42.2% of the total workforce. Encouraging as well is the fact that the majority of the workforce within the sector is skilled (78.8%), which translates to quality services and product offering.

In conclusion, while economic landscape continues to be challenging in terms of geopolitical climate, fluctuating energy prices and climate change issues, Lesotho is slowly regaining the travellers' confidence with notable recovery of the sector.

It is also evident that our marketing efforts and strategies have to be reconfigured to incorporate the upcoming markets such as US, India and China. 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.

