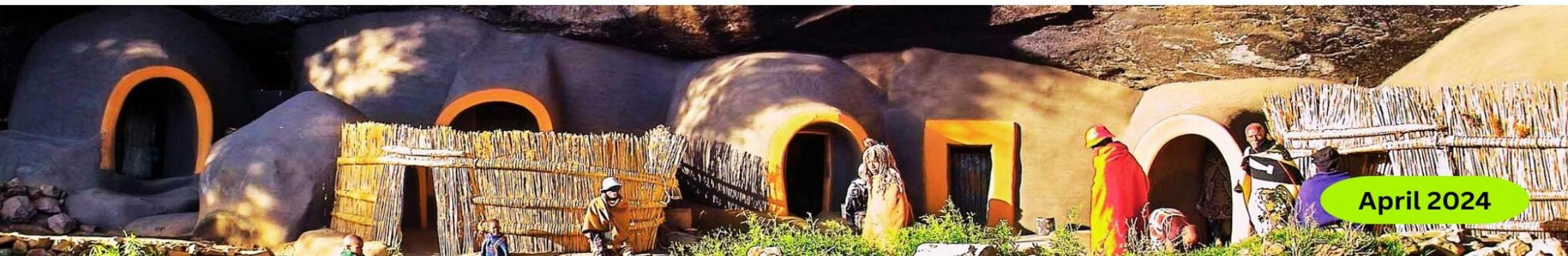# KEY ATTRACTIONS STATISTICS REPORT

JAN- DEC   2023

April 2024

Foreword

We are pleased to present to you the first Annual Visitor Attraction Statistics Report 2023, which provides information on visitation trends for some key tourism attractions in Lesotho. It covers 4 key attractions including Kome Caves, Morija Museum, Maletsunyane Waterfall and Thaba Bosiu. This report is a valuable resource to help our stakeholders better understand the current state of visitors preferences on the selected attractions and to identify opportunities for growth.

The COVID-19 pandemic has undoubtedly had a significant impact on the global tourism industry, and Lesotho is no exception. However, the report highlights the improved outcomes due to efforts and measures taken by the Lesotho Tourism Development Corporation in collaboration with the industry private sector, to mitigate the impact of the pandemic. This has resulted in a satisfactory rebound of the sector from the pandemic.

Significant numbers of visitors at the said attraction sites have been registered even though there is still much room for improvement. Encouraging is the fact that, overall, the number of visitors received by the attractions have surpassed the pre-pandemic levels, doubling and tripling at some attractions.

Members of the tourism private sector are encouraged to take the time to read through the report thoroughly and use the insights provided to inform business decision making and further innovation. Further, this report will be a valuable resource for policymakers, investors, and whoever is interested in Lesotho's tourism sector. We commend the entire team within the industry, especially the establishments that ensures proper recording of the data for their efforts in producing this report. As we continue to produce and improve this report year on year, including extending coverage to other key attractions, we hope it will help inform and shape the future of Lesotho's tourism industry.

Together we can achieve more!

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1. Introduction

Tourism serves as a vital economic pillar for numerous countries including Lesotho. As a landlocked country boasting breath-taking landscapes and a profound cultural heritage, Lesotho is committed to ensuring the success of its tourism sector and endeavours to maintain its beautiful attractions in a sustainable manner in order to appeal to both its domestic and international markets. This report presents the analysis of data collected from key local attractions in Lesotho, as part of strides to improve the marketing strategies and inform product development.

Key Visitor Attraction Definition
"...a formally administered attraction where it is feasible to charge admission for academic purposes and sightseeing. The attraction must be a permanently established excursion destination, a primary purpose of which is to allow access for entertainment, interest, or education and can include places of worship (but excludes small parish churches); rather than being primarily a retail outlet or a venue for sporting, theatrical, or film performances. It must be open to the public and should be capable of attracting international visitors as well as local residents and/or visitors.

2. Objectives

The objective of collecting data on local attractions is to monitor trends and to improve understanding of the dynamics of the movements across all key attractions. The findings also inform development and planning work, contribute to development of tourism promotion strategies be use for estimates of the economic impact of tourism. Further, operators can also use the findings to benchmark their operation within their category and to diversify their businesses to attract more clients.
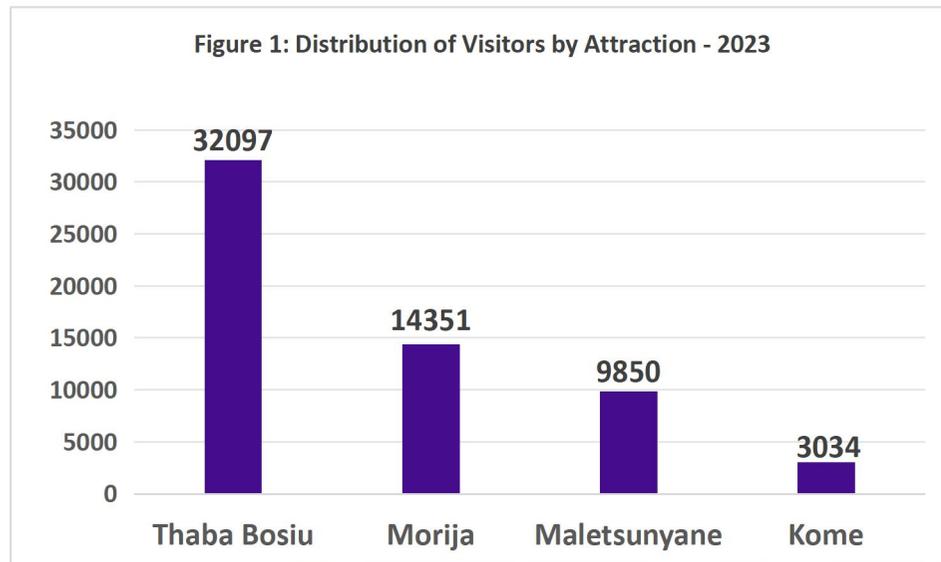
3. Methodology

Data was collected daily and compiled on monthly basis through the use of visitor record form, with each month's data contributing to the overall analysis for the year. This survey is a self-completion survey, which means all visitor numbers are provided by the attractions themselves.

4. Data Analysis

4.1 Distribution of Visitors

4.1.1 Visitors by Attraction

Figure 1: Distribution of Visitors by Attraction - 2023

4.1.2 Visitors by Attraction and Type of Market

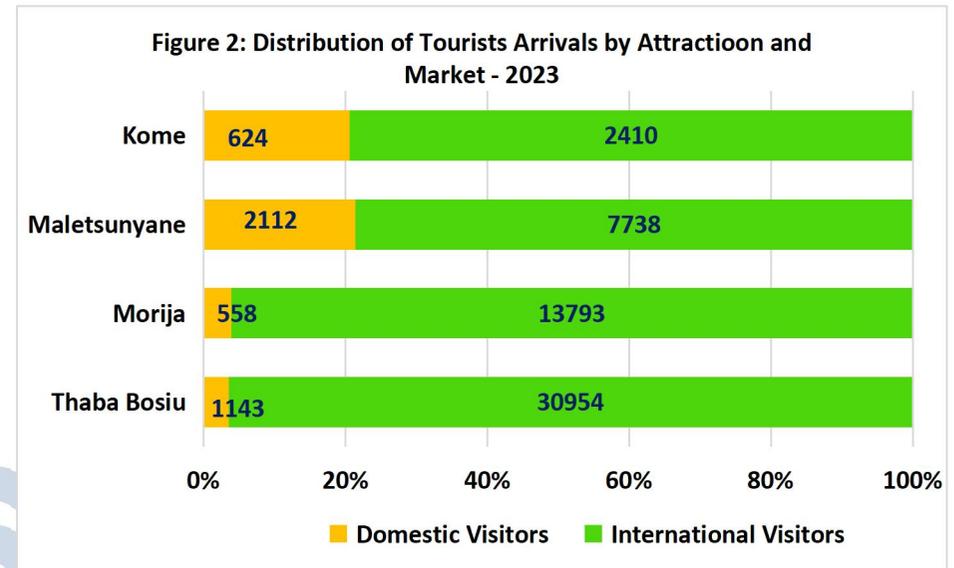Figure 2: Distribution of Tourists Arrivals by Attractioon and Market - 2023

Analysis in figure 1 depicts that:

- Thaba-Bosiu received the highest (32097) number of visitors, followed by Morija Museum with 14351 visitors, then by 'Maletsunyane Falls with 9850 visitors while Kome Caves received 3034 visitors.

Figure 2 reveals that:

- Thaba-Bosiu drew 30954 domestic visitors (96.4%) compared to 1,143 international visitors (3.6%), highlighting its great appeal among local visitors.
- Morija Museum was also primarily visited by locals, with 13793 (96.1%) domestic visitors compared to 558 (3.9%) international visitors.

- Kome Caves predominantly attracted locals as well, with 2,410 visitors (79%), and 20.9% of international visitors.
- Like Kome Caves, 'Maletsunyane Falls also attracted a notable number (2112, 21.4%) of international visitors, which was the highest compared to other attractions while its majority of visitors were domestic, totaling 7738 (78.6%).
- All four attractions show a trend of being predominantly visited by locals.

4.1.3 Visitors by Attraction and Type of Visitors

Figure 3: Distribution of Visitors by Attraction and type of Visitors

3 034

% of Kome Caves Visitors - 2023

% of Thaba Bosiu Visitors - 2023

32 097

DP - Domestic General Public
IP - International Visitors
SA - South Africans
TS - Tertiary Students
SC - School Children

14 351

9 850

% of Morija Visitors - 2023

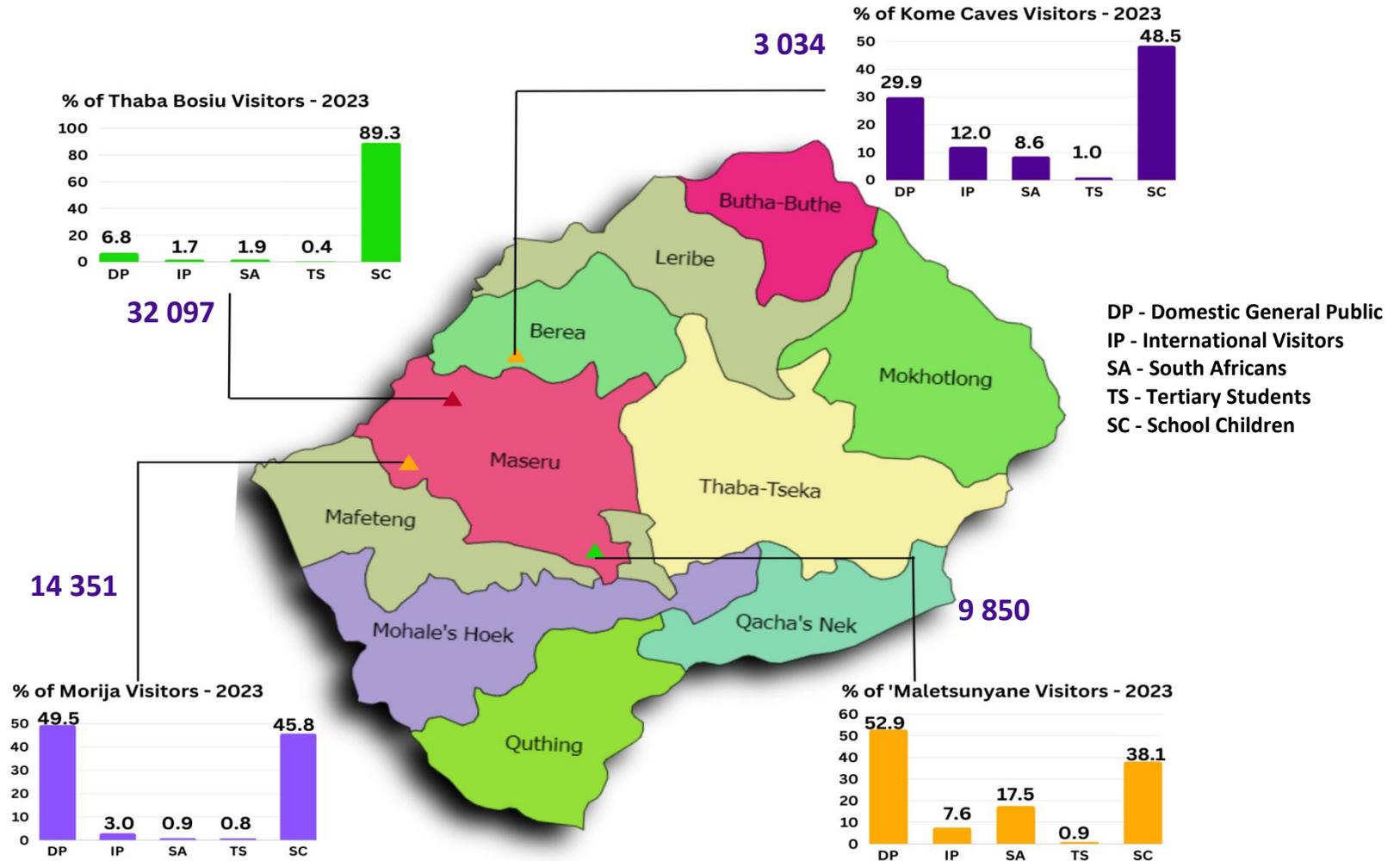**% of 'Maletsunyane Visitors - 2023**

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Figure 3 shows that:
- Visitors to Thaba Bosiu were predominantly School children making up 89.3% of its total visitors while general domestic visitors, made up only 6.8%. The International visitors accounted for 1.7% while South African visitors made up 1.9%. This suggests that Thaba-Bosiu was a destination of choice for educational trips, likely due to its historical significance.
- Morija Museum had a somehow balanced distribution, with 49.5% of its visitors being general domestic visitors and 45.8% being school children, indicating that the museum attracted both types of visitors fairly.
- 'Maletsunayane Waterfall also had a relatively balanced distribution, with domestic visitors adding up to 52.9% of visitors to this attraction while 38.1% were school children, suggesting that the waterfall appealed to both general tours and educational tours.
- Kome Caves received a higher percentage (48.5%) of school children visitors compared to 29.9% for general domestic visitors, demonstrating that the caves were more popular among school children, probably because of their educational value.
- Considerable numbers of International visitors and South Africans visited Kome caves and Maletsunyane waterfall, as compared to Thaba Bosiu and Morija Museum.
- Low numbers of tertiary student were registered at all attractions, accounting for less than 1% except for Kome Caves whereat the number stood at 1% of Kome Caves visitors.

4.2 Domestic Visitors' Profile

4.2.1 Distribution of Domestic Visitors by District
- Analysis by district in Table 1 indicates that the bulk (slightly

more than two thirds) of all local visitors were from Maseru district regardless of the attraction they visited.

Table 1: Distribution (%) of Visitors by District and Attraction - 2023					
District	Thaba Bosiu	Morija	'Maletsunyane Waterfall	Kome	Total
Berea	12.0	6.6	3.1	15.3	7.0
Mafeteng	13.1	10.6	3.3	2.0	8.5
Mohale's Hoek	2.0	7.2	1.0	7.3	4.7
Maseru	65.6	57.7	74.8	62.3	63.5
Mokhotlong	0.0	0.8	1.0	0.0	0.7
Leribe	3.4	9.2	12.6	6.5	9.4
Butha-Buthe	2.4	0.1	0.8	6.6	1.1
Qachas Nek	0.1	0.4	1.9	0.0	0.7
Quthing	1.0	7.3	1.0	0.0	4.1
Thaba-Tseka	0.5	0.0	0.6	0.0	0.2

- Considerable numbers were registered from Leribe (9.4%), Mafeteng (8.5%), Berea (7.0%). The rest of other districts registered visitors less than 5%.
- Thaba Bosiu attracted significant numbers from Berea, Mafeteng and Maseru.
- Morija was mostly visited by visitors from Mafeteng and Maseru, which could have been due to close proximity. On the other hand Leribe also registered a notable number at Morija museum
- As expected due to proximity, Kome caves attracted more visitors from Maseru and Berea.

4.3 South African Visitors' Profile

4.3.1 South African Visitors by Province of Residence and Attraction

Figure 4: Distribution of South African Visitors to Thaba Bosiu by province - 2023
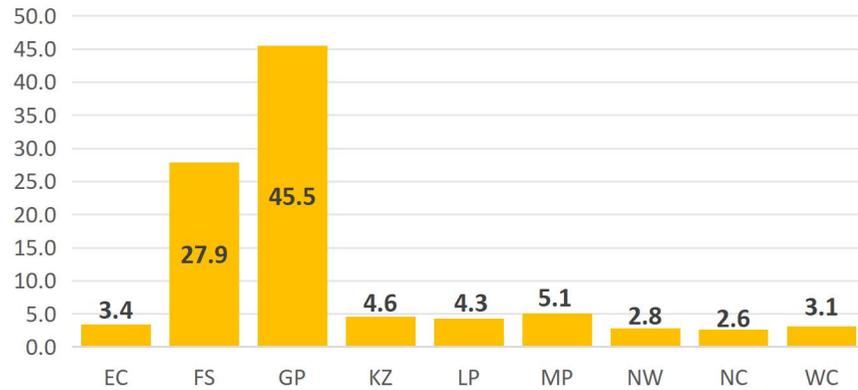
Province	Value
EC	3.4
FS	27.9
GP	45.5
KZ	4.6
LP	4.3
MP	5.1
NW	2.8
NC	2.6
WC	3.1

Figure 6: Distribution of South African Visitors to 'Maletsunyane Waterfall by Province - 2023

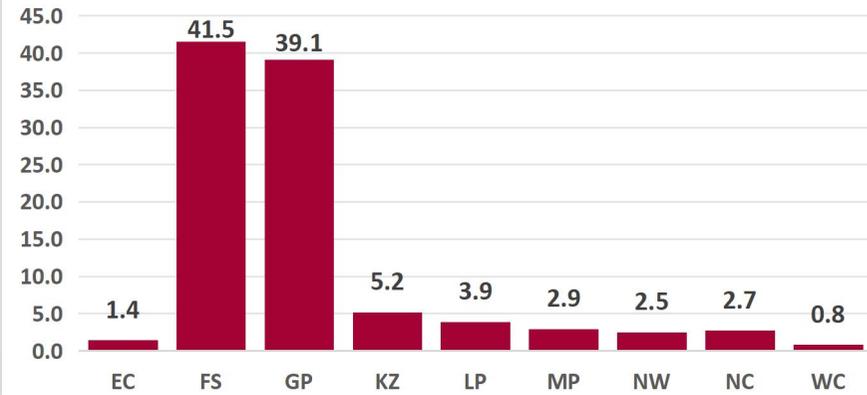| Province	Value
EC	1.4
FS	41.5
GP	39.1
KZ	5.2
LP	3.9
MP	2.9
NW	2.5
NC	2.7
WC	0.8

Figure 5: Distribution of South African Visitors to Morija by Province - 2023

Province	Value
EC	0.0
FS	5.4
GP	12.3
KZ	5.1
LP	0.0
MP	0.0
NW	10.5
NC	5.1
WC	20.5
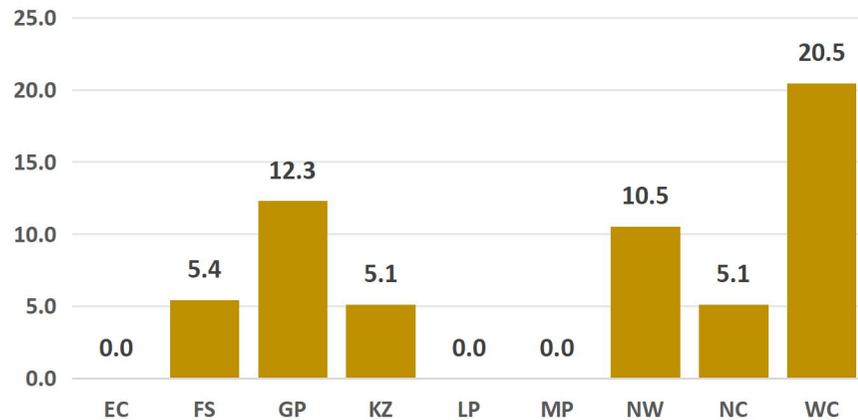
Figure 7: Distribution of South Afican Visitors to Kome Caves by Province - 2023

Province	Value
EC	11.1
FS	18.4
GP	40.6
KZ	9.2
LP	6.5
MP	0.0
NW	0.0
NC	8.0
WC	6.1
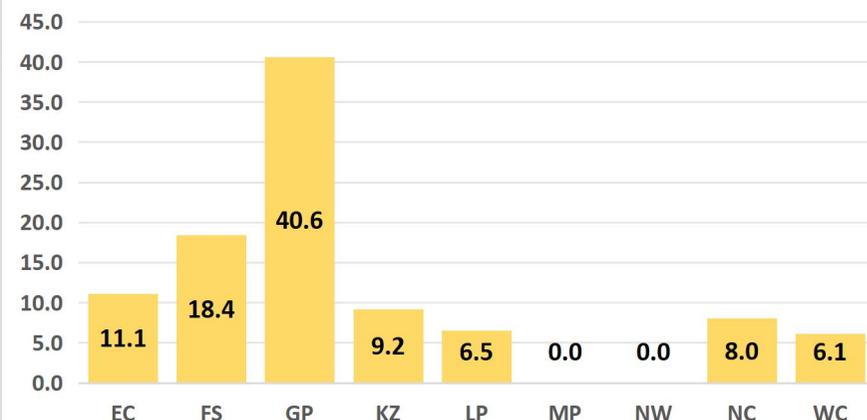
Analysis of South African Market in figures 4 to 7 portray that:

- Thaba Bosiu received visitors from all South African provinces, from which majority registered less than 5% of total (605) South Africans who visited Thaba Bosiu in 2023. Significant numbers of 45.5% and 27.9% were received from Gauteng and Free State provinces respectively.
- Morija Museum received visitors from six South African provinces only. More South Africans were from Western Cape province, accounting for 20.5%. Kwazulu Natal and Northern Cape registered the lowest percentage of 5.1 each. Notable numbers of visitors from Gauteng and North West provinces were also observed (12.3% and 10.5% respectively).
- Free State and Gauteng provinces were the leading South African source markets for 'Maletsunyane Waterfall with 41.5% and 39.1% of visitors respectively.
- The main source Province for Kome Caves was Gauteng Province followed by Free State, then by and Eastern Cape provinces with 40.6%, 18.4% and 11.1% respectively. Reasonable (more than 5% and slightly less than 10%) numbers came from Kwazulu Natal,Northern Cape, Limpopo and Western Cape provinces.
- In summary, figure 8 portrays that leading source province for South Africans was Free State province, from which 42.8% of all South Africans were from that province. Gauteng province also registered significant numbers accounting for 33.9% of all South Africans regardless of which attraction they visited. The rest of other provinces registered less that 8%.

Figure 8: Distribution of South Afican Visitors to Kome Caves by Province - 2023
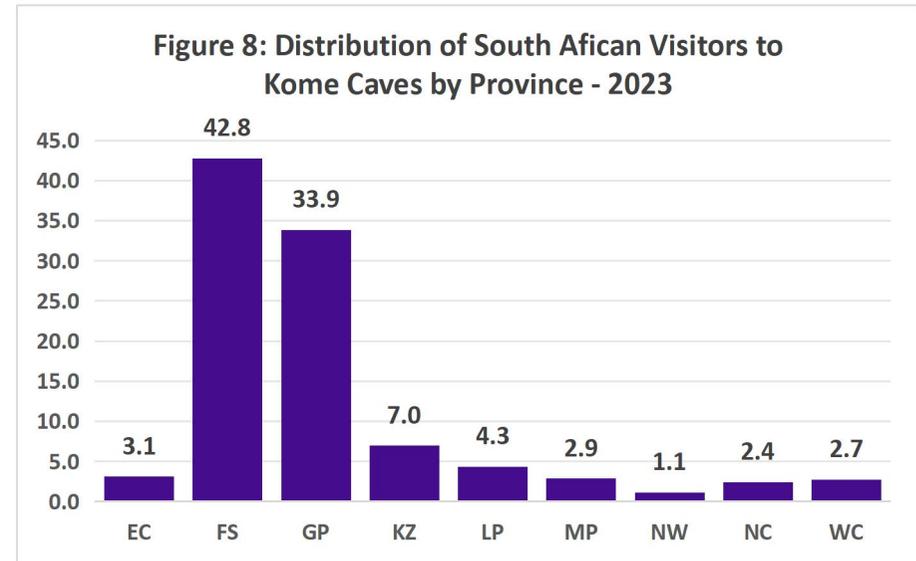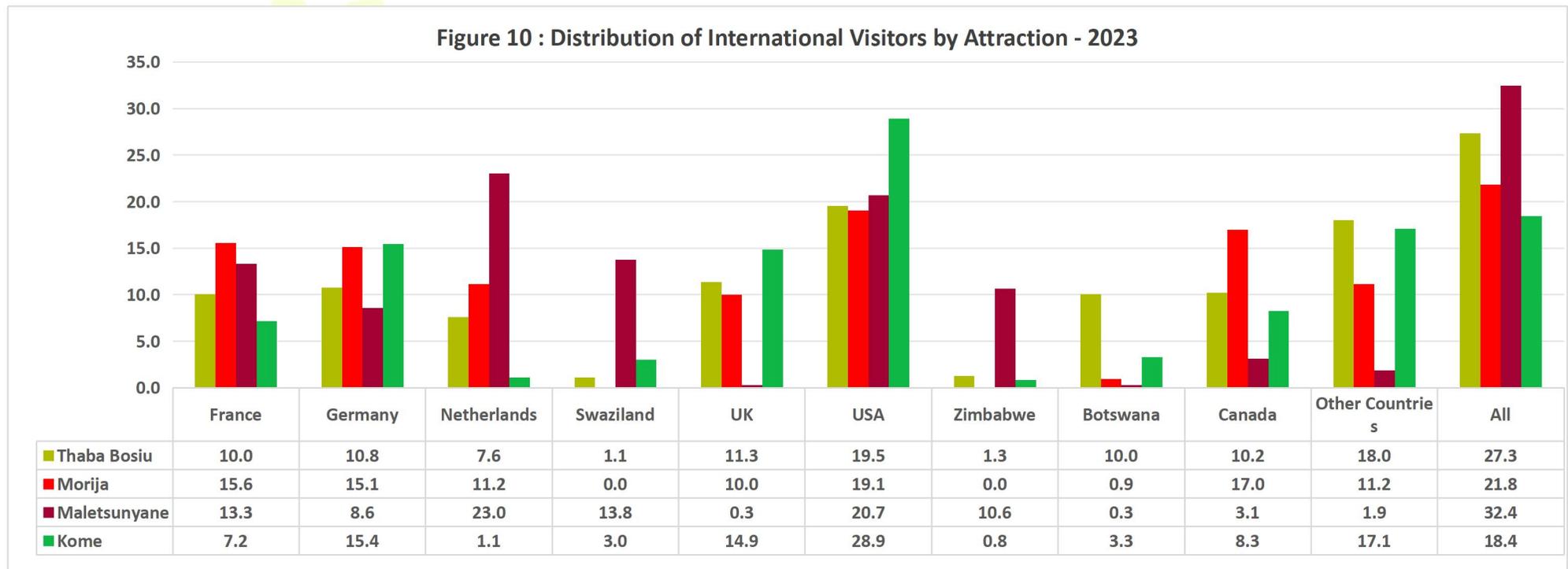

4.4 International Visitors' Profile

4.4.1 International visitors by Country

- Analysis in figure 9 above shows that from the international market, United States of America (USA) was the main source market with its residents making up 18.5% of all international visitors. United Kingdom (UK) was the second major source market with 14.9%. Netherlands, Germany, France and Canada came third, forth, fifth and sixth respectively.On the seventh position was Botswana from the African continent with Batswana making up 8.8% of total international visitors.

Figure 9: Dstributuion of International Visitors by Country - 2023
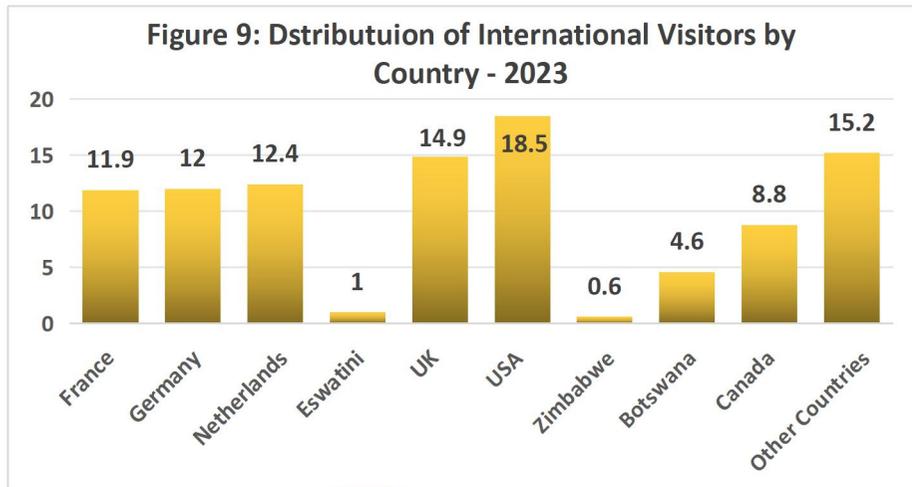
4.4.2 International visitors by Attraction

- Further analysis in figure 10 indicates that 'Maletsunyane Waterfall was the most appealing attraction for International visitors as it was visited by 32.4% of visitors from this market, followed by Thaba Bosiu which registered 27.3%. Morija Museum was on the third position with 21.8% and Kome registered 18.4% of international visitors.

- All attractions recived more visitors from THE United States of America, whereat Kome received more (28.9%) followed by 'Maletsunyane Waterfall with 20.7% then by Morija Museum and Thaba Bosiu with 19.1% and 19.5% respectively.

- Germans, French and Batswana visited Thaba Bosiu and Morija more than other attractions.
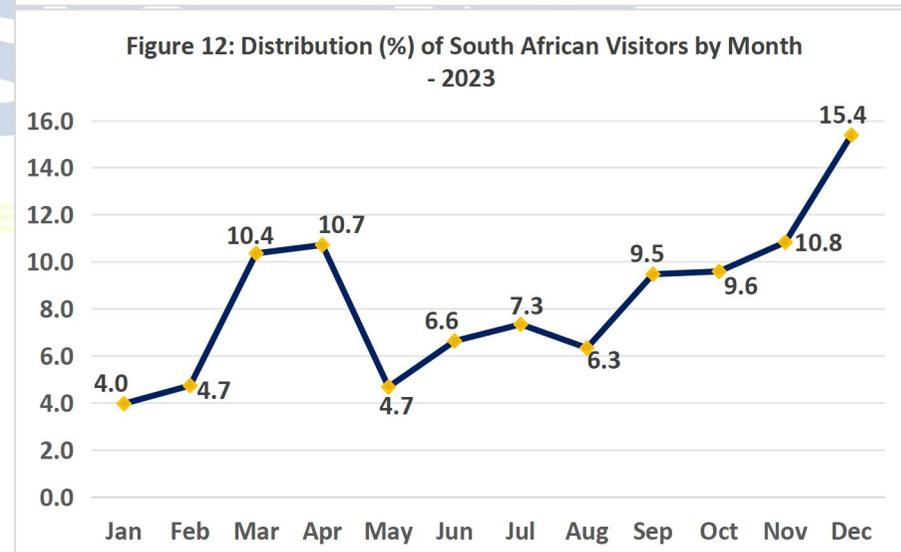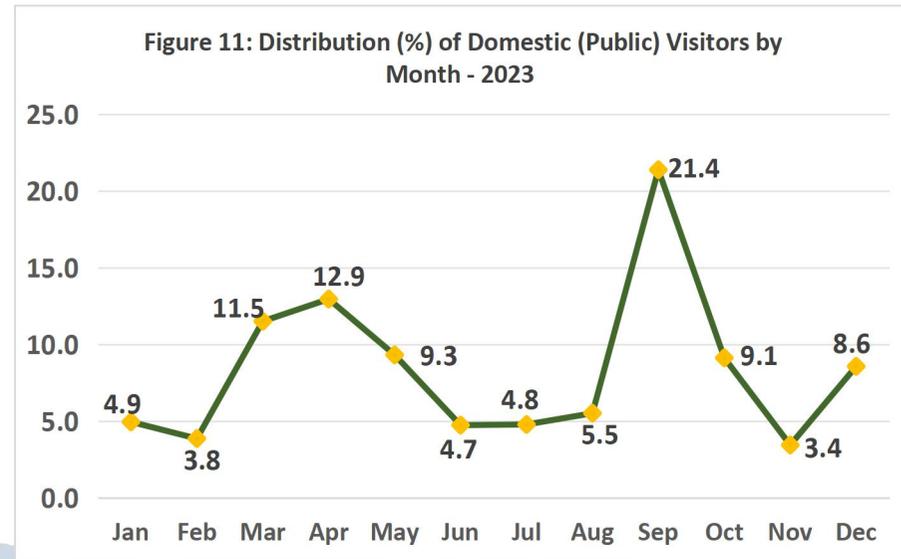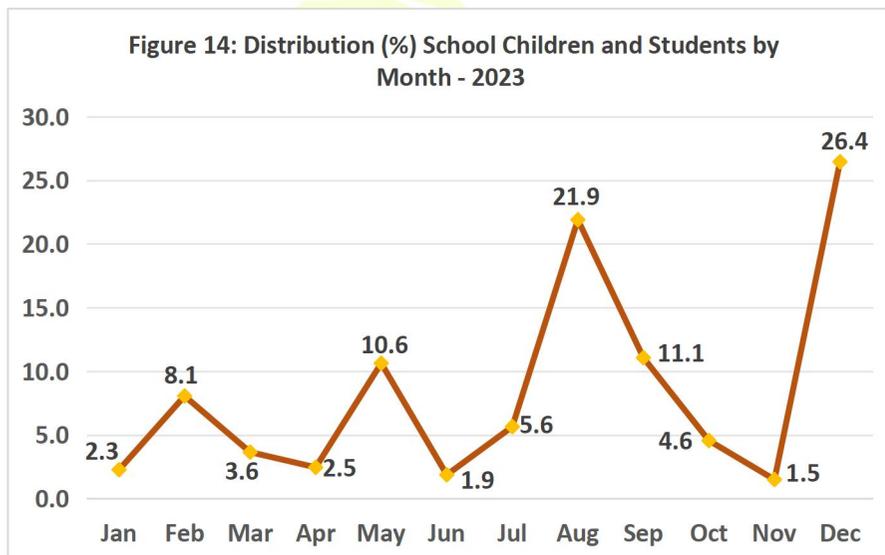

Figure 10 : Distribution of International Visitors by Attraction - 2023

	France	Germany	Netherlands	Swaziland	UK	USA	Zimbabwe	Botswana	Canada	Other Countries	All
Thaba Bosiu	10.0	10.8	7.6	1.1	11.3	19.5	1.3	10.0	10.2	18.0	27.3
Morija	15.6	15.1	11.2	0.0	10.0	19.1	0.0	0.9	17.0	11.2	21.8
Maletsunyane	13.3	8.6	23.0	13.8	0.3	20.7	10.6	0.3	3.1	1.9	32.4
Kome	7.2	15.4	1.1	3.0	14.9	28.9	0.8	3.3	8.3	17.1	18.4

4.5 Seasonality

4.5.1 Seasonality by Type of Visitors

Seasonality generally indicates the phenomenon of changing demand or supply in the tourism industry due to different socio-economic factors. Analysis of patterns of visitss depicted variations across the four attractions.

- Figure 11 illustrates the analysis of Domestic visitors to the four attractions, which indicates that, local visitors to all four attractions fluctuated across the year. There was an increase between February and April, followed by trough between April and September. September received the highest number of visitors for the year, reaching 21.4% of all local visitors regardless of the attraction. That was followed by another drop in October and November while there was a slight increase between November and December. The observed pattern could be attributed to Easter break between March and April, which comes with the desire for people to travel and unwind. The same applies with September, which is the beginning of spring after people had hibernated due to the cold weather.

- Analysis of South African visitors in figure 12 depicts that their visits pattern also fluctuated across the year, reaching peak in December (with 15.4% of all South African visitors), which aligns with the fact that, that time is a time of festivities and people travel to different destinations and there are also a variety of events at that time, some of which are hosted at these attractions. Further due to proximity of Lesotho to South Africa, the observed attribute could have been because of South Africans who visit friends and relatives during December holidays.

Figure 11: Distribution (%) of Domestic (Public) Visitors by Month - 2023

Figure 12: Distribution (%) of South African Visitors by Month - 2023

Figure 13: Distribution (%) of International Visitors by Month - 2023

Figure 14: Distribution (%) School Children and Students by Month - 2023

- A fluctuating trend was also observed among the International visitors with a notable drop in May and June and a steady increase in June to August. The number of international visitors to these attractions reached peak in October and November. This could have been due to the big events (Roof of Africa Rally, Women in Tourism Southern Africa and 'Maletsunyane braai Festival) and that attracted visitors from across the globe.

- Likewise, visitors from the academic fraternity fluctuated across the months with sharp drops in April June and November and hikes in February, May, August and December. The February increase could be because it is the beginning of most of the schools' academic years and students and pupils travel to see these attractions that may be part of their syllabus. May is the ideal time for schools trips since it is the and of the school term and while August is the beginning of another after winter holidays and schools trips are undertaken to set the scene for learners. Just like in May, December is the end of the year for most schools and learners travel to unwind after the exams, to understand better what they learned during the year about the topics relating to local attractions and some in preparation for the following academic year.

4.5.2. Five year comparison

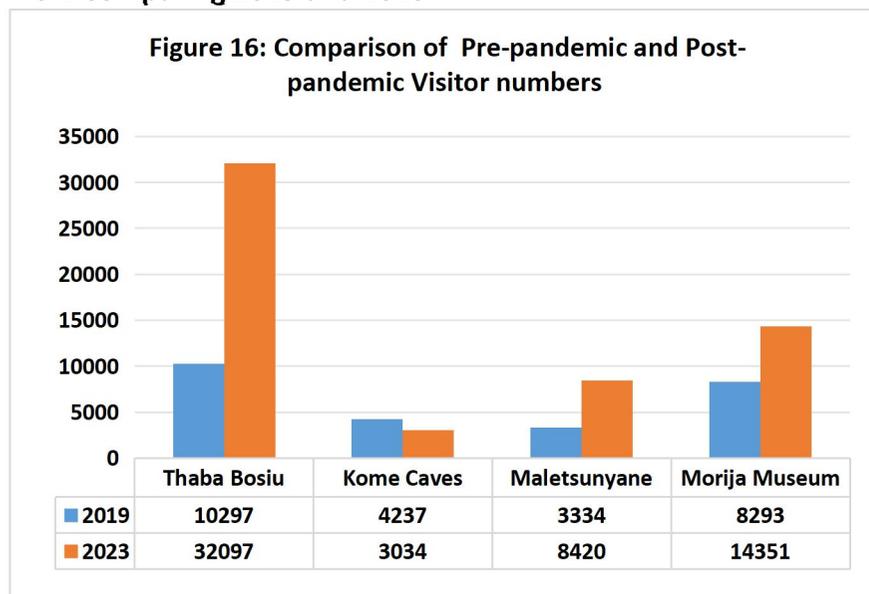Figure 15: Year on Year Distribution of Visitors by Attraction 2019 - 2023
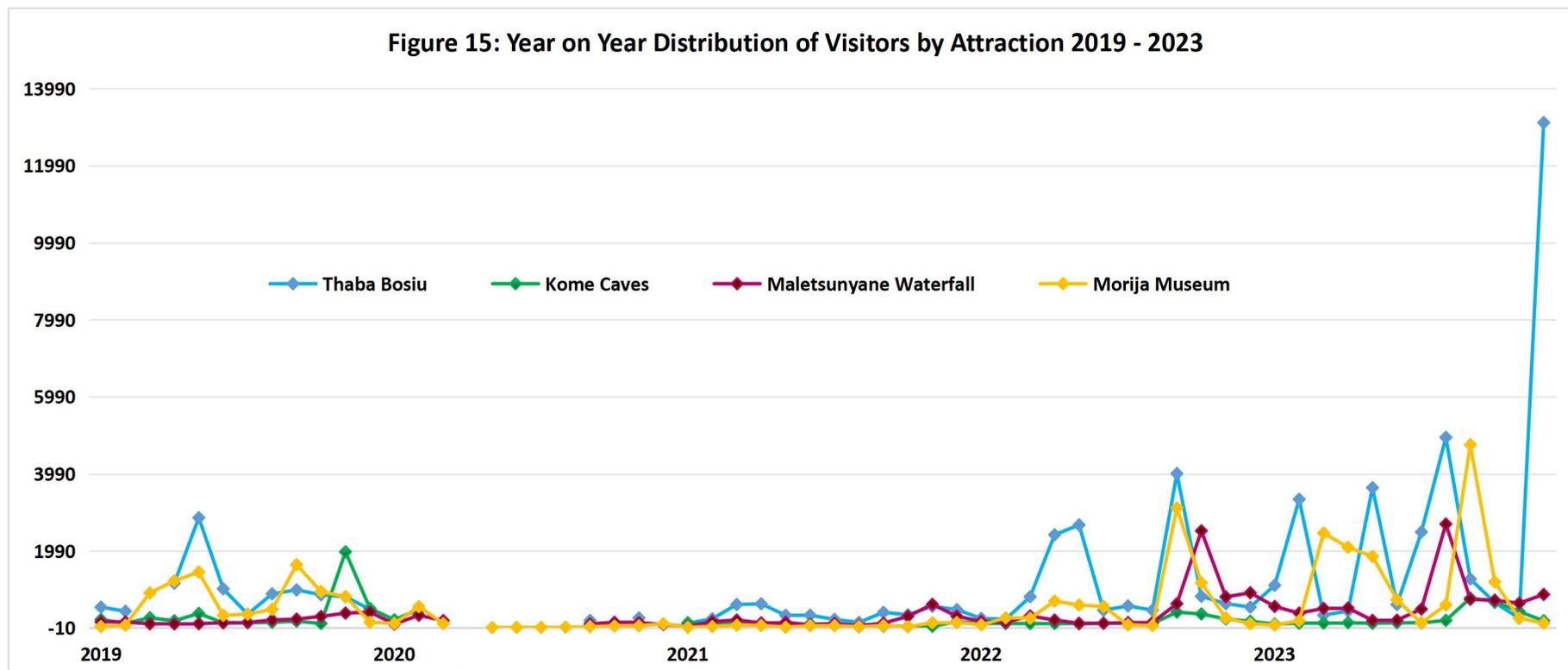
The year on year analysis in figure 15 shows that the number of visitors at all the attractions dropped in 2020 and began to pick up in the early months of 2021 for Thaba Bosiu and 'Maletsunyane Waterfall, and assumed a moderately fluctuating trend throughout that year. Kome Caves and Morija also picked up but with very low numbers (mostly 10 to 20 visitors per month). Thereafter all attractions began to receive more and more visitors although they still saw fluctuating trends according to the seasonality as outlined in the previous analysis. Generally, it is observed that the number of arrivals have increased for all attractions with some registering over 4000 visitors in some month. Notably, Thaba Bosiu received 13 110 visitors in December 2023. This observed trend is a sign of recovery of travel confidence among travelers, after the pandemic started late 2019.

4.6 Pre-Pandemic vs Post-Pandemic Comparison

4.6.1 Comparing 2019 and 2023

Figure 16: Comparison of Pre-pandemic and Post-pandemic Visitor numbers

	Thaba Bosiu	Kome Caves	Maletsunyane	Morija Museum
2019	10297	4237	3334	8293
2023	32097	3034	8420	14351

Comparison of visitor numbers before and after the COVID 19 reveals that, Thaba Bosiu, 'Maletsunyane Waterfall and Morija Museum visitor numbers surpassed the pre-pandemic levels in 2023. Thaba Bosiu visitors tripled and were over the triple mark by 11.7% (211.7%). 'Maletsunyane Waterfall visitors numbers were beyond the double mark by 52.6% (152.6%), while Morija Museum visitors were left with 26.9 percentage points before reaching double.

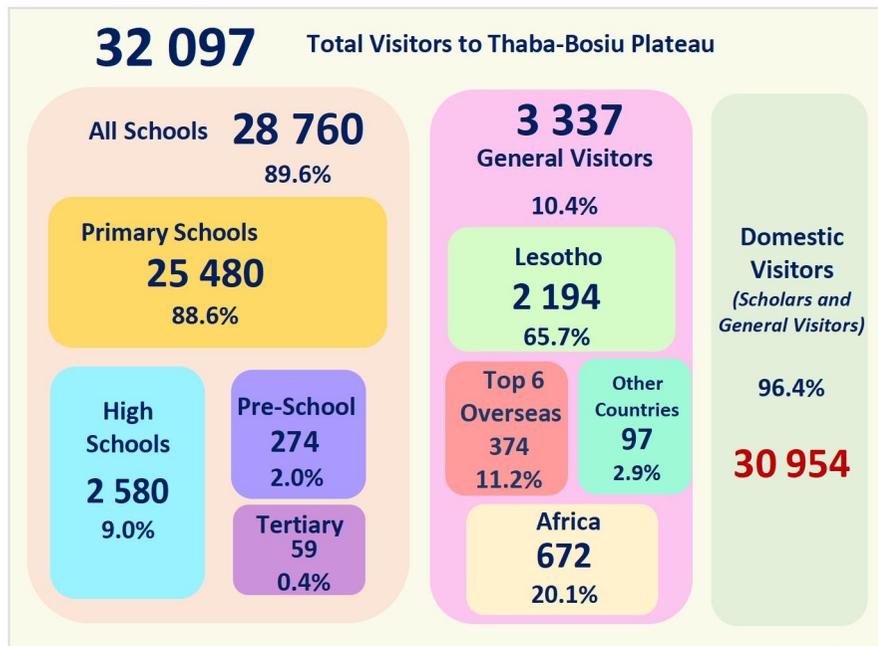Part of Drakensburg Mountain Range

Thaba Bosiu

4.7. Analysis of Thaba Bosiu Visitors

4.7.1 Thaba Bosiu Visitors by Type of Visitor and Origin

Figure 17: Distribution of Visitors to Thaba Bosiu 2023

The analysis of Thaba Bosiu visitors statistics indicate that:

- 89.6% of visitors to this attraction were school children and students. Within this category, 88.6% were primary school children, 9.0% were High school children and 2.0% were pre-school children. Less than 1% were tertiary students.
- Among the General public (3337) which accounted for 10.4% of the total visitors to Thaba Bosiu, 65.7% were Basotho, 11.2% were from the top 6 Seven overseas countries. Africans made up 20.1% while

there rest of other countries of the world registered 2.9% of general visitors excluding students.

- The domestic market including general public, students and school children added up to 96.4% of all visitors to Thaba Bosiu.

Figure 18: Visitors from Lesotho (excl. students) by District - 2023 *(% of total Visitors from Lesotho only)*
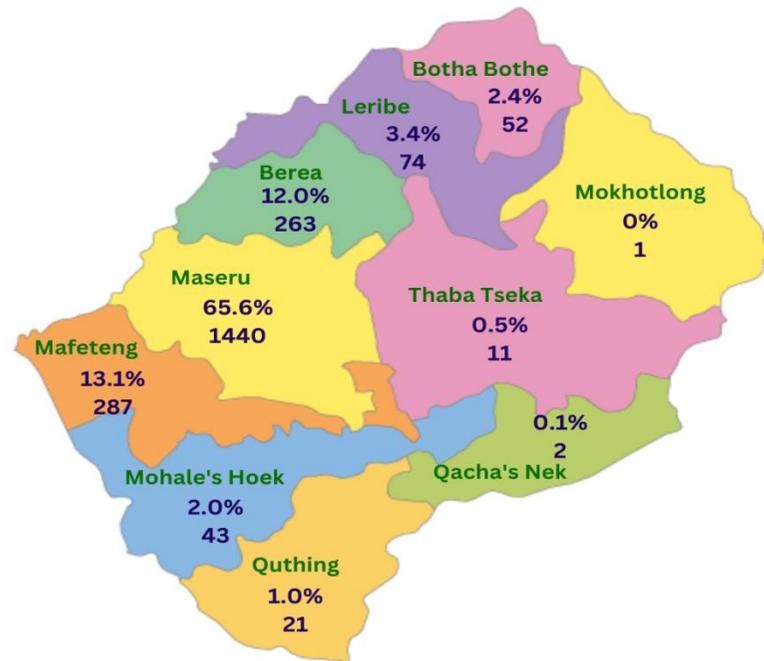

Figure 18 shows distribution of domestic visitors to Thababosiu by district.

- Maseru, Mafeteng and Berea were the leading domestic source markets for Thaba Bosiu, where slightly more than two thirds (65.6%) of visitors originated from Maseru.

- Less than 5% of visitors from the rest of other districts were received in Thaba Bosiu.

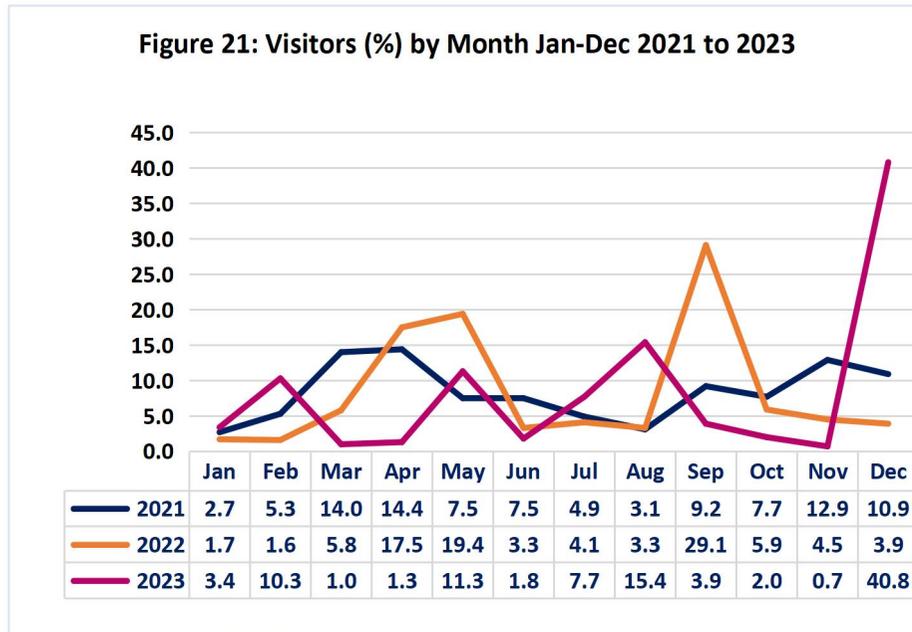**Figure 19: South African Visitors by Province of Origin - 2023**
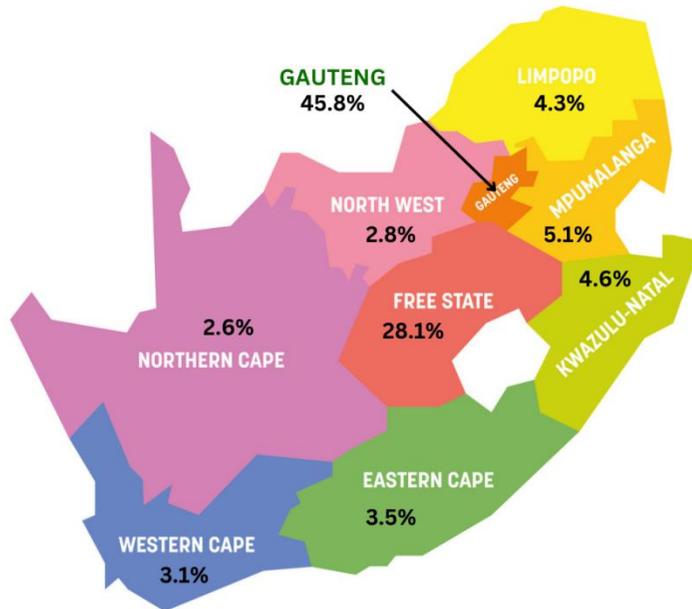
- A total 605 of South Africans visited Thaba Bosiu in 2023. Among those, almost half (45.8%) came from Gauteng province while almost one third (28.1%) came from Free State province. Comparison with other provinces indicate that Gauteng and Free State were the main source markets for South African visitors to Thaba Bosiu.

Figure 20: South African Visitors by Province of Origin - 2023
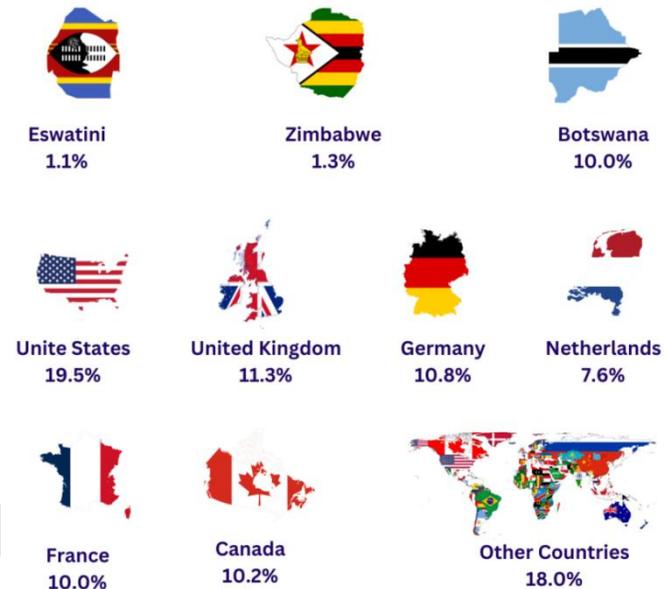
- The majority of overseas visitors came from United States of America (USA) who made up 19.5% of total international visitors.
- Notable numbers of visitors were also received from the United Kingdom (11.3%), Germany (10.8%), France (10.0%), and the Netherlands (7.6%) and Canada (10.2%).These countries, including USA were the top 5 international source markets for Thaba Bosiu.
- Apart from South Africa, which was the leading source market for Thaba Bosiu visitors, Botswana, Zimbabwe and Eswatini registered notable numbers of visitors accounting for 10.0%, 1.3% and 1.1% respectively.

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4.7.2 Seasonality of Thaba Bosiu Visits

Figure 21: Visitors (%) by Month Jan-Dec 2021 to 2023

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2021	2.7	5.3	14.0	14.4	7.5	7.5	4.9	3.1	9.2	7.7	12.9	10.9
2022	1.7	1.6	5.8	17.5	19.4	3.3	4.1	3.3	29.1	5.9	4.5	3.9
2023	3.4	10.3	1.0	1.3	11.3	1.8	7.7	15.4	3.9	2.0	0.7	40.8

- Figure 21 portrays a wavering trend was observed across the months. It shows that February, May August and December were the peak months reaching 10.3%, 11.3%, 15.4% and 40.8% of total visitors respectively.
- The Low season for this attraction was March, April, June, September and November. The observed trend could be resultant from the fact that Thaba Bosiu is the hub for educational trips and the convenient times for school trips are within the peak months.
- Comparison across years indicate that the visits seasons were similar between 2021 and 2023 with the exception of 2023 wherein the first peak was in February with a drop in March and April while for the previous years the peaks were in March and April. Another difference was that for the previous years, December was a low season while in 2023 the visitor numbers the highest adding up to 40.8%.

'Maletsunyane Waterfall

Maletsunyane Waterfall is one of the highest single dropping waterfalls in Africa, creates a haze of smoke as the water plummets 186 metres into a spectacular gorge. It is from this smoke that Semonkong gets its name.

The fall allows abseil adventure which descends 204m non–stop to the bottom of the gorge where few people dare to plod. Standing on the edge of the fall you will be exposed to all the elements of the gorge & tranquilising scenery. The abseil itself is an extremely exposed straight drop where at times you are suspended in mid-air with the spray of the waterfall upon you & the birds of the cliffs flying around you. 'Maletsunyane water fall is a hub for a range of exiting adventure activities.

4.8 Analysis of 'Maletsunyane Waterfall Visitors

4.8.1 'Maletsunyane Waterfall Visitors by Type of Visitor and Origin

Figure 22: Distribution of Visitors to 'Maletsunyane Waterfall 2023
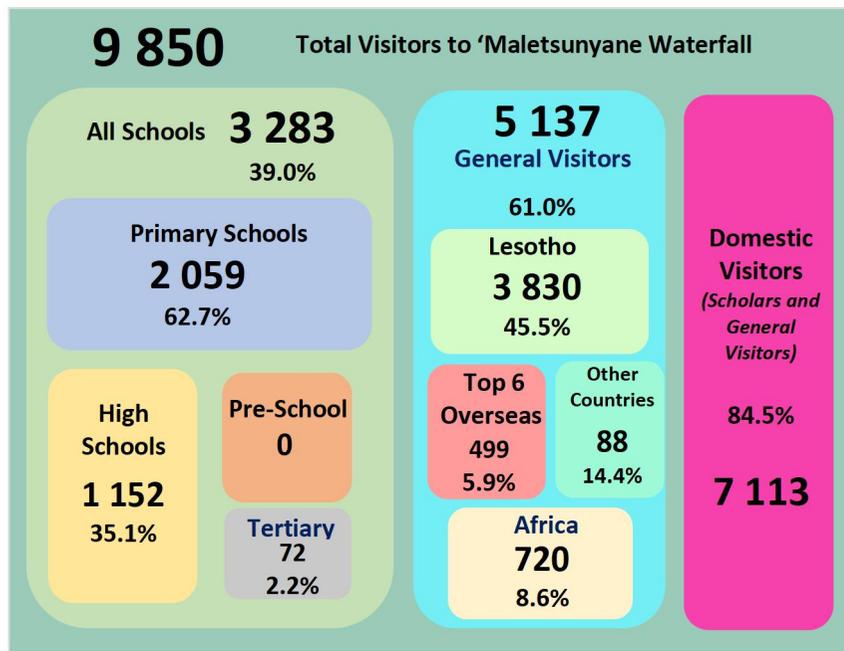
- The total number of Visitors to 'Maletsunyane Waterfall in 2023 was 8420.
- Of the total, 39.0% were school Children, of which 62.7% were primary school children, 35.1% were High School children and 2.2% were from tertiary institutions.
- 5137 visitors were general bublic regardless of their origin and among these, 45.5% were Lesotho residents, while those from the top 6 overseas countries, African states, and other countries added up to 5.9%, 8.6% and 14.4% respectively.

- All domestic visitors being school children and general public made up 84.5%.

Figure 23: International (%) Visitors by Country of Residence 2023
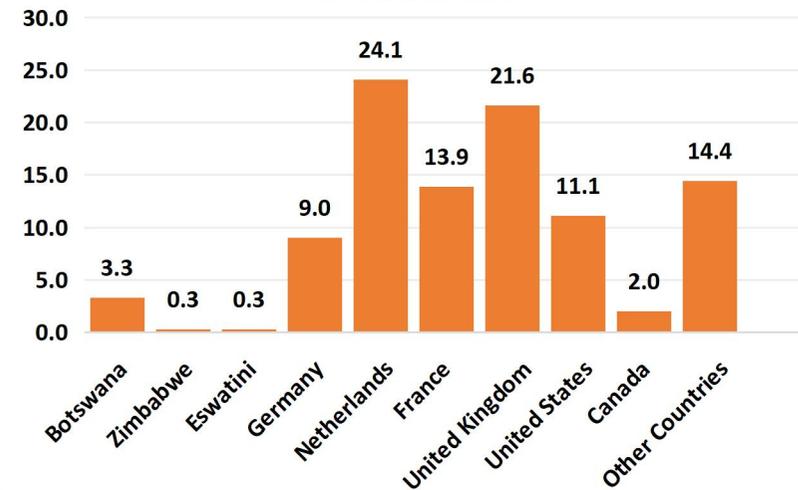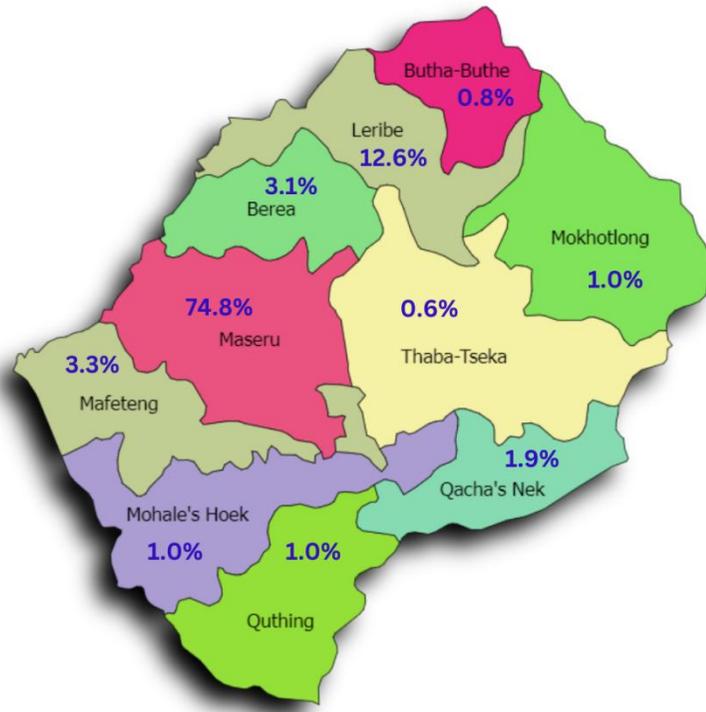

Figure 23 illustrates the distribution of International visitors to 'Maletsunyane Waterfall by country excluding South Africa. It protrays that:

- From the European market, the dutch people visited in high numbers as evidenced by 24.1% of visitors registered from Netherlands.
- Following Netherlands, United Kingdom, France and the United States of America were the next notable markets contributing 21.6%, 13.9% and 11.1% respectively.
- Botswana from the African markets registered more (3.3%) visitors that Zimbabwe and Eswatini (0.3% each) and these were the only African states that were registered.

**Figure 24: Distribution of Domestic Visitors to 'Maletsunyane Waterfall by district- 2023**

Further analysis on origin of visitors was performed for South Africa being the major source Market for arrivals to Lesotho. Figure 25 illustrates that:

- The highest munber of South African visitors to the fall was from the Free State province, registering 41.5%
- Gauteng followed withy 34.9%, which was also followed by Kwa-Zulu Natal with only 5.2%.
- The rest of other provinces accounted for below 5% of visitors from South Africa. The rest of other provinces were represented by less than 5%.

Figure 25: Distribution of Visitors (%) from South Africa by Province - 2023

- Visitors from Maseru made a significant contribution to the visitor numbers 'Maletsunyane Waterfall, accounting for 74.8% This indicates that Maseru serves as a key source market for domestic tourism for this attraction.
- Leribe accounted for 12.6% of domestic visitors while Thaba-Tseka registered the least number, accounting for only 0.6%.
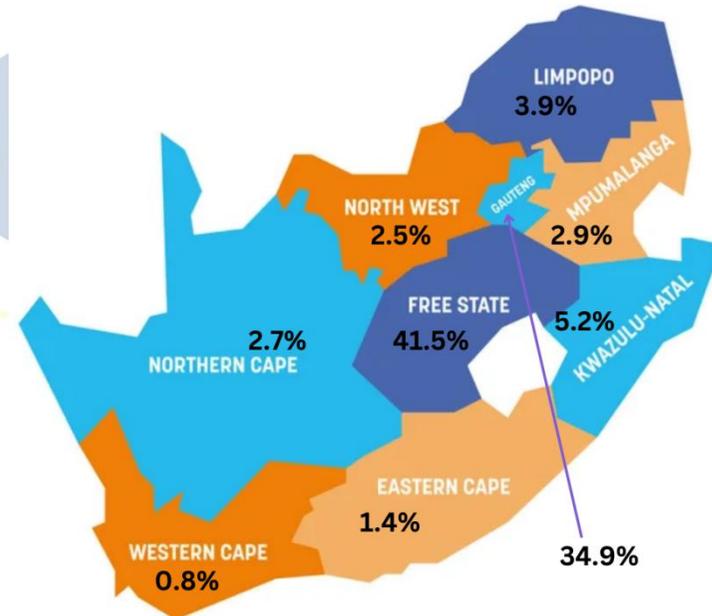
4.8.2 Seasonality of 'Maletsunyane Waterfall Visits

Figure 26: Distribution (%) of Visitors by Month 2021 - 2023

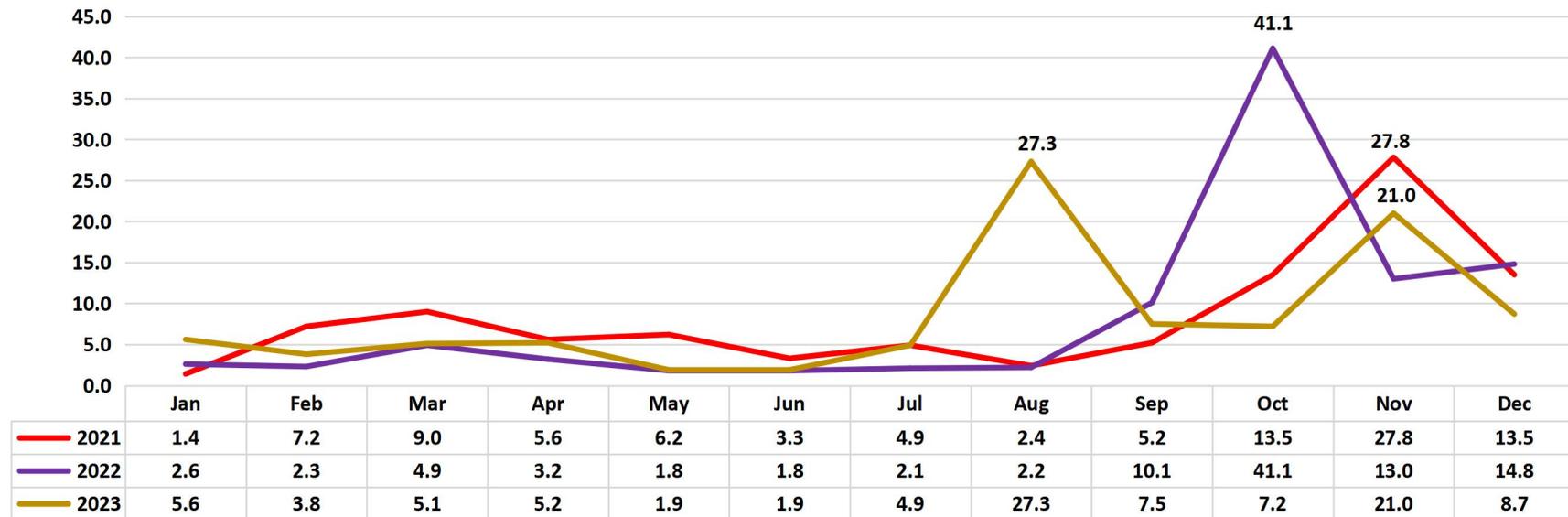|	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2021	1.4	7.2	9.0	5.6	6.2	3.3	4.9	2.4	5.2	13.5	27.8	13.5
2022	2.6	2.3	4.9	3.2	1.8	1.8	2.1	2.2	10.1	41.1	13.0	14.8
2023	5.6	3.8	5.1	5.2	1.9	1.9	4.9	27.3	7.5	7.2	21.0	8.7

Figure 26 indicates that the proportion of visitors to 'Maletsunyane Waterfall fluctuated across the months with fewer numbers recorded in the first 6 months. Sharp hikes were observed in August, October and November in 2023, 2022 and 2021 respectively.

4.9 Analysis of 'Maletsunyane Waterfall Visitors

### 4.9.1 'Maletsunyane Waterfall Visitors by Type of Visitor and Origin

Figure 27: Distribution of Visitors to 'Maletsunyane Waterfall 2023
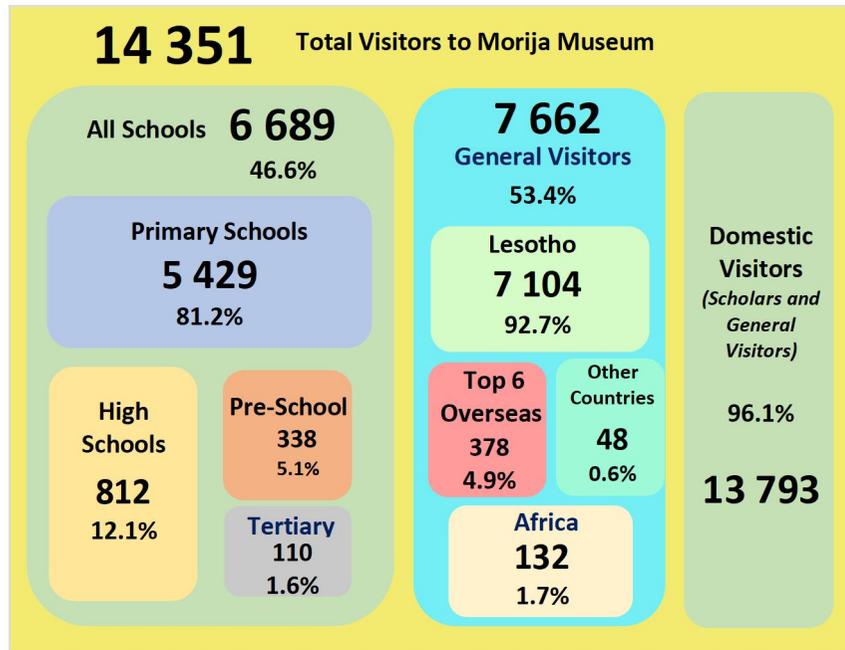
- The total number of visitors to Morija Museum was 14351 in 2023.
- Out of that number, 96.1% were local residents including school children, while 3.9% were international visitors.
- Learners and students combined accounted for 46.6% of the total visitors to Morija Museum. Among this group, 81.2% were Primary school children, 12.1% were High School learners while pre- school leaners and tertiary students made up 5.1% and 1.6% respectively.

- Members of the general public, excluding learners accounted 53.4% of the total visitors, with local residents constituting 92.7% of that group.
- The remaining 7.3% was made up of the top 6 overseas residents, Africans and other unspecified countries.

Figure 28: Distribution (%) of International Visitors by Country of Residence 2023
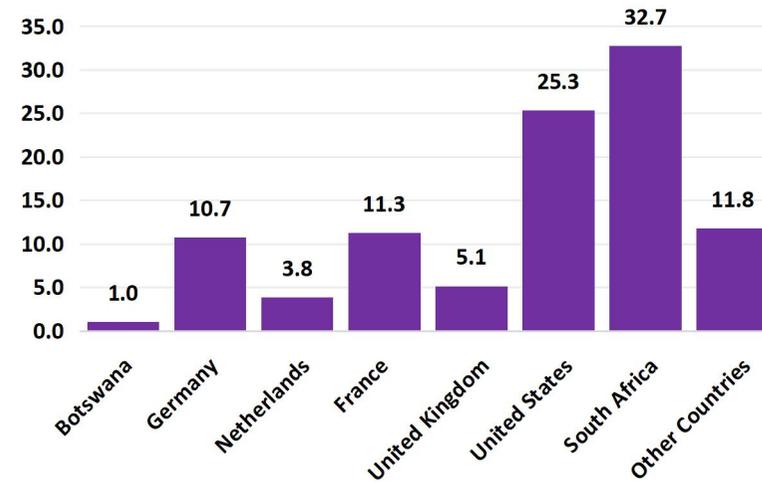
Further analysis of international market in figure 28 reveals that:

- South Africa was the main source market for Morija Museum with 32.7% of its residents having visited the museum in 2023. United States of America was second with 25.3% of international visitors, followed by France with 11.3% and Germany with 10.7%.
- United Kingdom, Botswana and Netherlands contributed with 5% and below.
- Other unspecified countries accounted for 11.8%.

Figure 29: Distribution (%) of Domestic Visitors by district - 2023

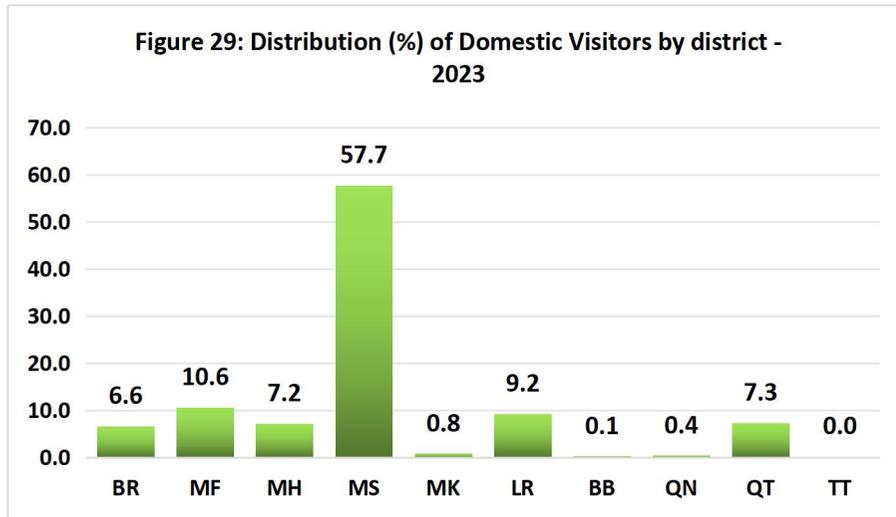**Figure 30: Distribution (%) of South Africans by Province - 2023**

Figure 29 indicates the analysis of local residents by district of origin. It shows that:

- The majority of local residents who visited Morija Museum were from Maseru, adding up to 57.7%.
- The rest of other districts registered less that 10% of local residents with the exception of Mafeteng whose residents registered 10.6%.
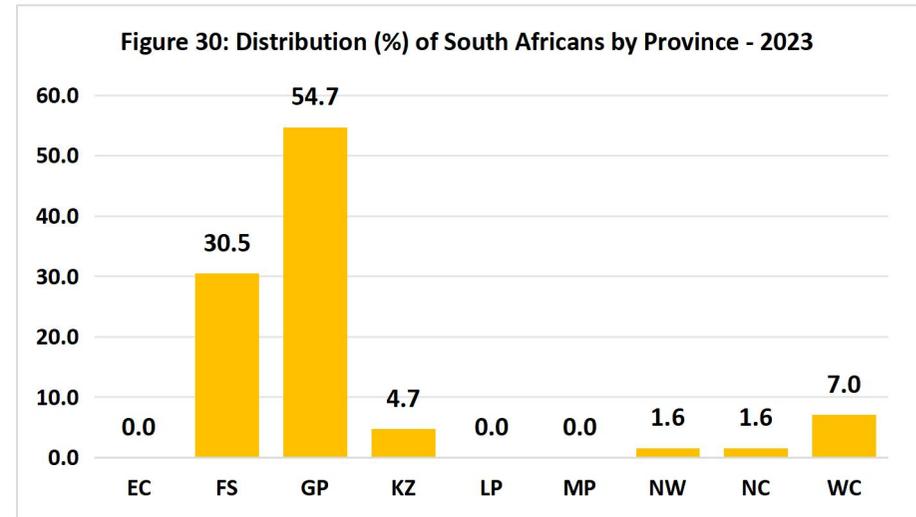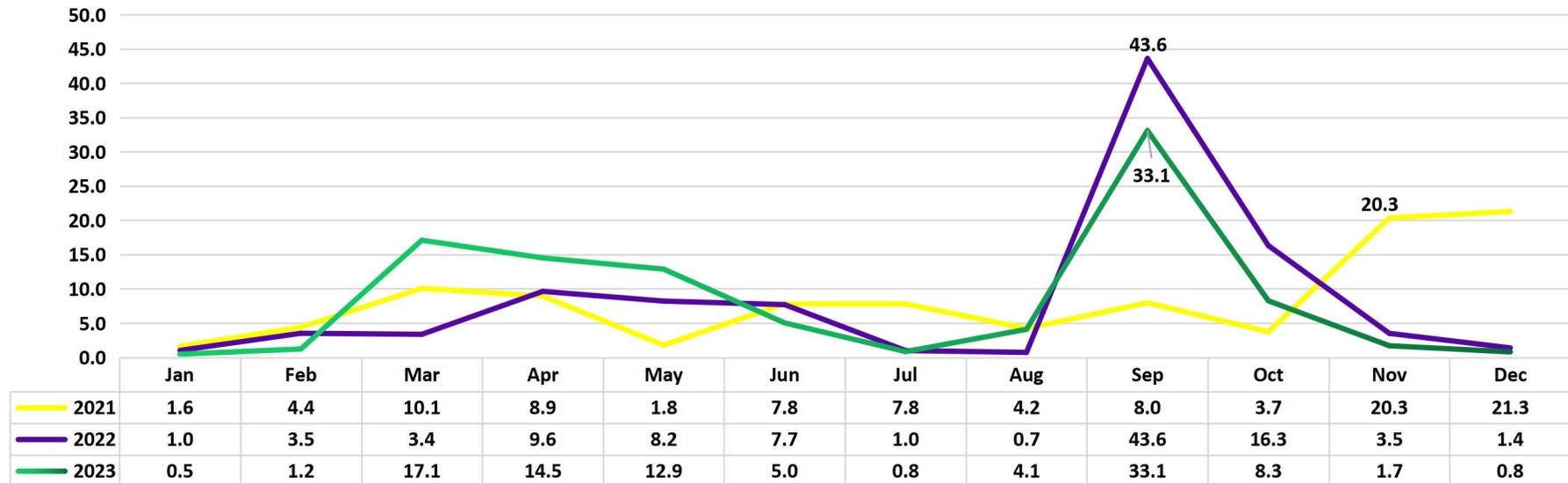
Figure 30 presents the analysis of South African market and it indicates that:

- Gauteng province was the leading source market for Morija Museum with more that half (54.7%) of all visitors from South Africa coming from this province.
- Free State province was the second source market with 30.5% of South Africans.
- Western Cape and Kwa-Zulu Natal also registered notable numbers while very few were from Mpumalanga, Northern Cape and North West provinces.

4.9.2 Seasonality of Morija Museum Visits

Figure 31: Distribution (%) of Visitors by Month 2021 - 2023

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2021	1.6	4.4	10.1	8.9	1.8	7.8	7.8	4.2	8.0	3.7	20.3	21.3
2022	1.0	3.5	3.4	9.6	8.2	7.7	1.0	0.7	43.6	16.3	3.5	1.4
2023	0.5	1.2	17.1	14.5	12.9	5.0	0.8	4.1	33.1	8.3	1.7	0.8

- Morija Museum experienced a wavering trend throughout 2023 and the two previous years, in terms of the number of visitors received regardless of their origin.
- The trends however indicates that the months of March, September and November were the peak season for Morija Museum while January, February, July, August, October and November (except in 2021) were low seasons.
- The facility witnessed the highest visitation in November in 2021, while in 2022 and 2023 the highest visitation was experienced in September.
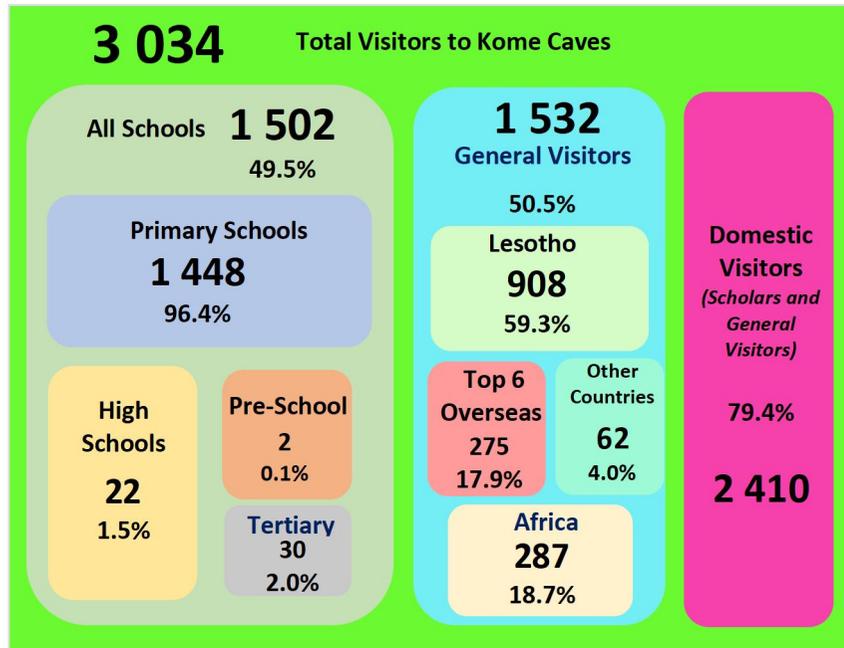
Kome Caves

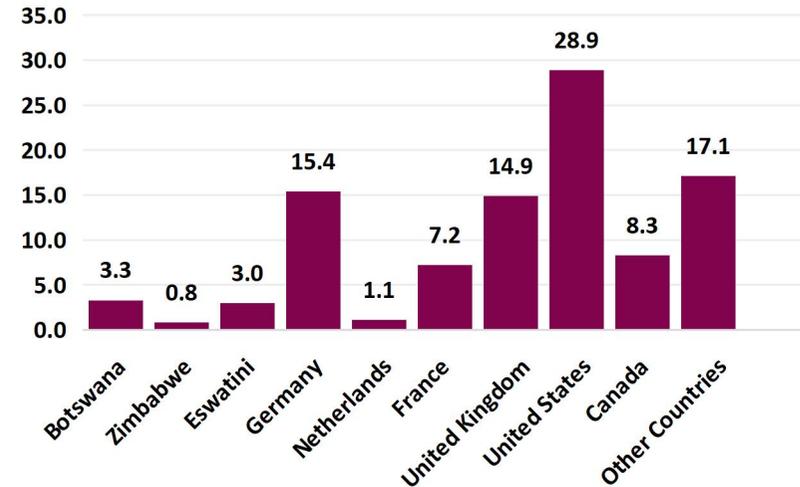Tsung-Han Wu

4.10 Analysis of Kome Caves Visitors

4.10.1 Kome Caves Visitors by Type of Visitor and Origin

Figure 32: Distribution of Visitors to Kome Caves 2023

Figure 33: International (%) Visitors by Country of Residence 2023

- The Kome Caves received 3034 visitor in 2023.
- Of that numberl, 49.5% were school Children, of which 96.4% were primary school children. High School children and Tertiary students accounted for only 1.5% and 2.0% respectively, While Pre-school children made up 0.1%
- Of the 1532 general public, 59.3% were Lesotho residents, while those from the top 6 overseas countries, African states, and other countries added up to 17.9%, 18.7% and 4.0% respectively.
- All domestic visitors being school children and general public made up 79.4%.
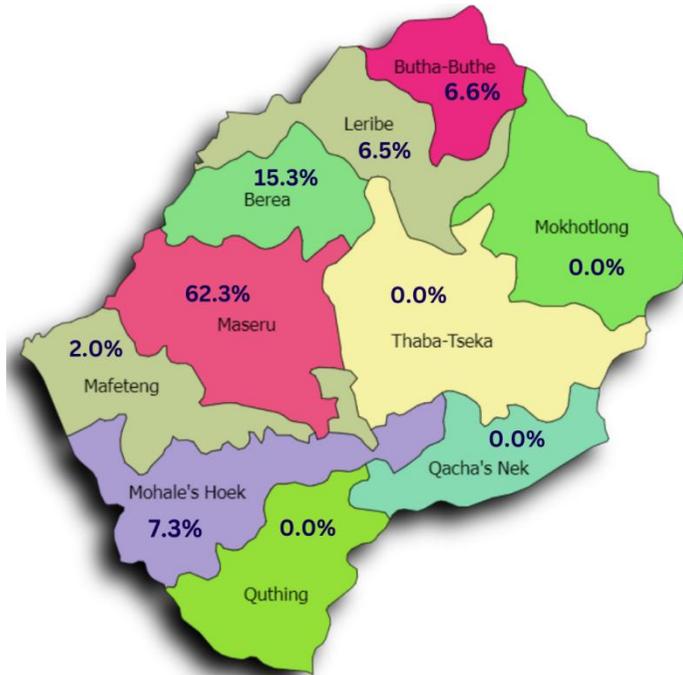
Analysis of Kome Caves visitation by country excluding South Africa in figure 33 shows that:

- Visitors from United States of America, Germany and United Kingdom were most dominant with 28.9%, 15.4% and 14.9% respectively.
- African states registered lower numbers that made up between 0.8% and 3.3%.

Figure 34: Distribution of Domestic Visitors to Kome Caves by district-2023

Further analysis on origin of visitors was performed for South Africa being the major source Market for arrivals to Lesotho. Figure 35 indicates that:

- Among South Africans, Gauteng was the leading source markets for Kome Caves, whereat visitors from this province added up to 40.6 %.
- Fre State province was the second largest source market with 18.4% visitors, followed by Eastern Cape province with 11.1% and Kwa-Zulu Natal with 9.2%.
- Western Cape, Limpopo and Nothern Cape provinces accounted for between 6.1% and 8.0% of visitors from South Africa, while there were no visitors recorded from Mpumalanga and North West provinces.

Figure 35: Distribution of Visitors (%) from South Africa by Province - 2023
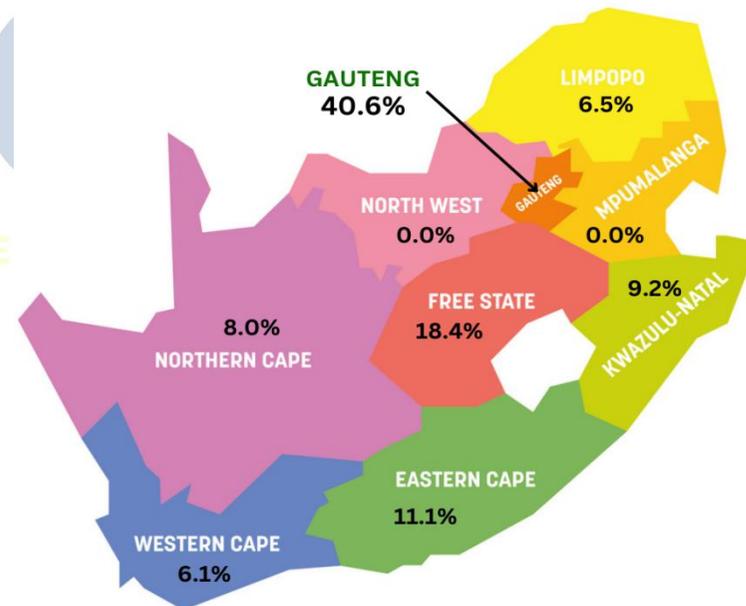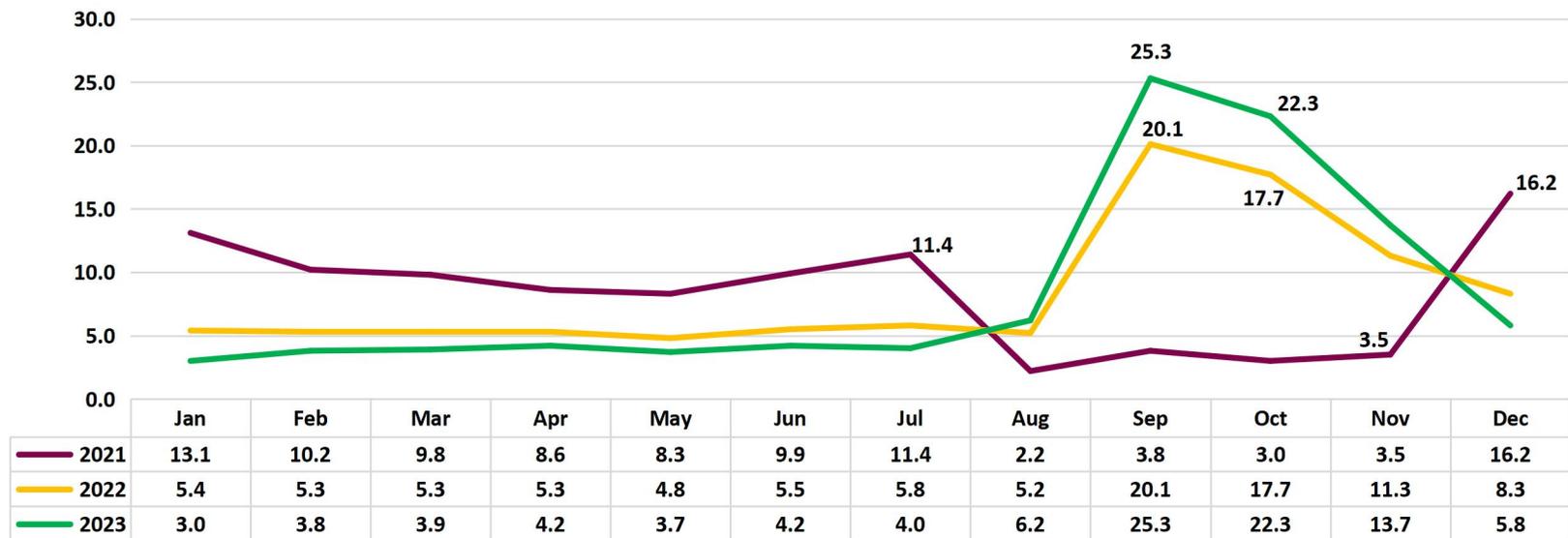

- As with other attractions, visitors from Maseru were significantly higher compared to other districts, adding up to 62.3% of total general visitors from Lesotho. This indicates that Maseru serves as a key source market for domestic tourism for this attraction as well, probably due to its proximity to most of areas in Maseru.
- Mohale's Hoek registered second with 7.3% of visitors, followed by Botha Bothe with 6.6%, then Leribe with 6.5%.

4.10.2 Seasonality of Kome Caves Visits

Figure 36: Distribution (%) of Visitors by Month 2021 - 2023

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2021	13.1	10.2	9.8	8.6	8.3	9.9	11.4	2.2	3.8	3.0	3.5	16.2
2022	5.4	5.3	5.3	5.3	4.8	5.5	5.8	5.2	20.1	17.7	11.3	8.3
2023	3.0	3.8	3.9	4.2	3.7	4.2	4.0	6.2	25.3	22.3	13.7	5.8

- In 2021 Kome Caves saw the peak season in December, registering 16.2% of all visitors to this attraction. This came after a drop in August, after which the number of visitors were somehow steadily low until that hike in December.
- Similar pattern was observed in 2022 and 2023, except that for those years, the number of visitors increased significantly in September and kept dropping until December.
- Overall, Figure 36 suggests that Kome Caves usually experiences low season in the early months of the year. It further indicates that the beginning of the spring season is somehow the peak season for Kome Caves arrivals.

5. Conclusion

In conclusion, the growth in visitor numbers at the attractions from 2022 to 2023 reflects a growing interest in Lesotho's tourism offerings among both domestic and international tourists. The majority of visitors are domestic tourists, with school groups emerging as a significant market segment therefore highlighting the importance of targeted marketing efforts towards school groups and students and the relevance of creativity and innovation to develop more products appropriate for this market in order to benefit more from this group.

Delving deeper, it was evident from the analysis that South Africa remained the primary source market for international visitors, indicating the need for targeted marketing campaigns in key provinces such as Gauteng, Free State, KwaZulu-Natal, and Western Cape. By focusing on these provinces and collaborating with South Africa to promote cross border tourism, the LTDC can further enhance Lesotho's appeal and popularity and promote tourism development. Further, more marketing in these provinces can also translate to more interest from other provinces such as the Eastern Cape, Western Cape and Northern Cape which seem to be the upcoming markets.

Lastly, the variation in visitation patterns at the different attractions throughout the year presents opportunities to develop products and experiences that can attract tourists year round. By diversifying offerings and targeting specific market segments, Lesotho can continue to grow its tourism sector and reap the economic benefits that will translate into increased visitor numbers. This in particular speaks to proper coordination and support for the tourism private sector for more innovation and development of products that will cater for the needs of visitors all year round.