



2009 Accommodation Statistics Report

DEPARTMENT OF RESEARCH & DEVELOPMENT

TABLE OF CONTENTS

INTRODUCTION.....	2
TYPES OF ACCOMMODATION ESTABLISHMENTS BY DISTRICTS	2
NUMBER OF ROOMS AND BEDS	4
BED OCCUPANCY RATE	5
REVENUE	7
EMPLOYEES	8
SUMMARY	9

INTRODUCTION

The Lesotho Tourism Development Corporation (LTDC) through the Department of Research and Development (R&D) collects and processes information from Accommodation Establishments quarterly. This information is collected by a form that is distributed to all Accommodation Establishments in Lesotho, which then (Owners/Managers of Establishments) fill the form with the assistance of staff from the R&D where necessary. In some cases, some establishments fill the forms and return them to LTDC.

This report presents an analysis of the performance of Accommodation Establishments in Lesotho during the year 2009. These include all types of establishments that offer accommodation to visitors, from well established Hotels to Home Stays. The establishments are classified into three (3) categories, being: Hotel, which includes hotels only; Lodge, which includes lodges only, and: Other, which includes all types of accommodation establishments that are neither Hotels nor Lodges.

In 2009, 121 Accommodation establishments participated in this survey, even though the picture was not observed for all four quarters because 112 forms were retrieved for the first quarter, 111 for the second quarter, 116 and 114 for the third and fourth quarter respectively. The numbers fluctuate because some of these establishments are owned by Government Ministries like Ministry of Agric and during certain seasons they are closed for public use.

This report presents the number, types and distribution of Accommodation Establishments by District, number of rooms and number of beds, occupancy rates, revenue and the number of employees employed in this sub-sector. Comparison with the previous years will be made to observe the changes that happen annually.

Types of Accommodation Establishments by Districts

The total number of Accommodation Establishments in Lesotho has been increasing over the years. Table 1 below shows that there were 103 Accommodation Establishment in 2007 which increased to 108 in 2008. The highest increase in the number of Accommodation Establishments was observed in 2009. This might have been caused by the 2010 FIFA World Cup that will be held in South Africa, given the fact that most of the increase was observed in the Maseru and Mafeteng districts which are closer to Bloemfontein being one of the host cities.

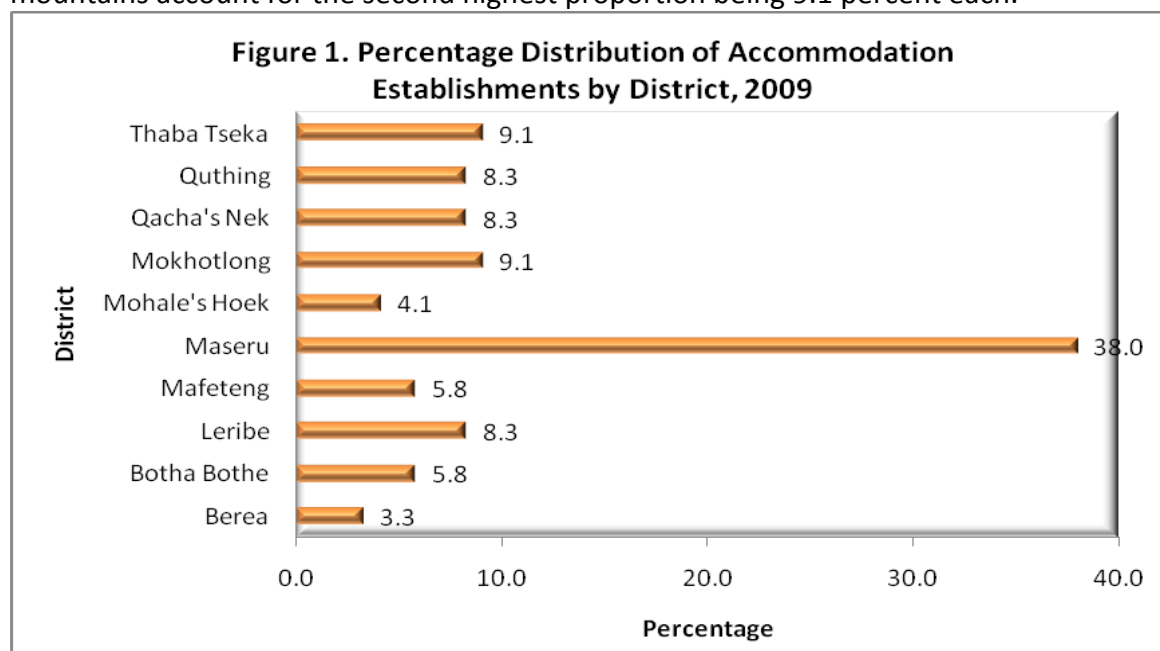
The table also shows that in 2009 there was one (1) new Lodge and twelve (12) new establishments that fall under the category "Other" and as stated before, most of them are in the Maseru district. Another observation depicted in the table is that the number of Accommodation Establishments in Qacha's Nek decreased by three (3) in 2009 as compared to 2008. This is because two (2) Establishments were closed due to refurbishment and lack of running water while the other did not incorporate due to the fact that it was operating without a license.

Table 1. Number and Types of Accommodation Establishments by District

District	Hotel	Lodge	Other	Total	2008	2007
					2009	
Berea	2	-	2	4	4	4
Botha Bothe	1	2	4	7	8	7
Leribe	2	1	7	10	9	10
Mafeteng	2	1	4	7	5	4
Maseru	6	9	31	46	35	36
Mohale's Hoek	2	-	3	5	5	5
Mokhotlong	2	3	6	11	10	10
Qacha's Nek	1	2	7	10	13	9
Quthing	1	2	7	10	11	10
Thaba Tseka	1	3	7	11	8	8
Total	20	23	78	121		
2008	20	22	66		108	
2007	18	21	64			103

It is also worth noting that for the past three (3) years, there has not been any change in the number of Accommodation Establishments in Berea with four (4) Accommodation Establishments and Mohale's Hoek with five (5) Accommodation Establishments.

The information on the distribution of Accommodation Establishments is further presented in Figure 1 below which shows that the majority of Accommodation Establishments are found in the Maseru district. Thaba Tseka and Mokhotlong which are found in the mountains account for the second highest proportion being 9.1 percent each.



The figure also shows that Berea and Mophale's Hoek accounted for the least proportions of Accommodation Establishments with 3.3 percent and 4.1 percent respectively.

Number of Rooms and Beds

It is important to collect information on the Number of Rooms and Beds because this information gives a picture of the carrying capacity of Accommodation Establishments in Lesotho and also within a specific area. The information in table 2 below shows that the Number of Rooms increased steadily from 2,105 rooms in 2007 to 2,254 rooms in 2008 then 2,429 rooms in 2009 indicating a 7.8 percent increase between 2008 and 2009

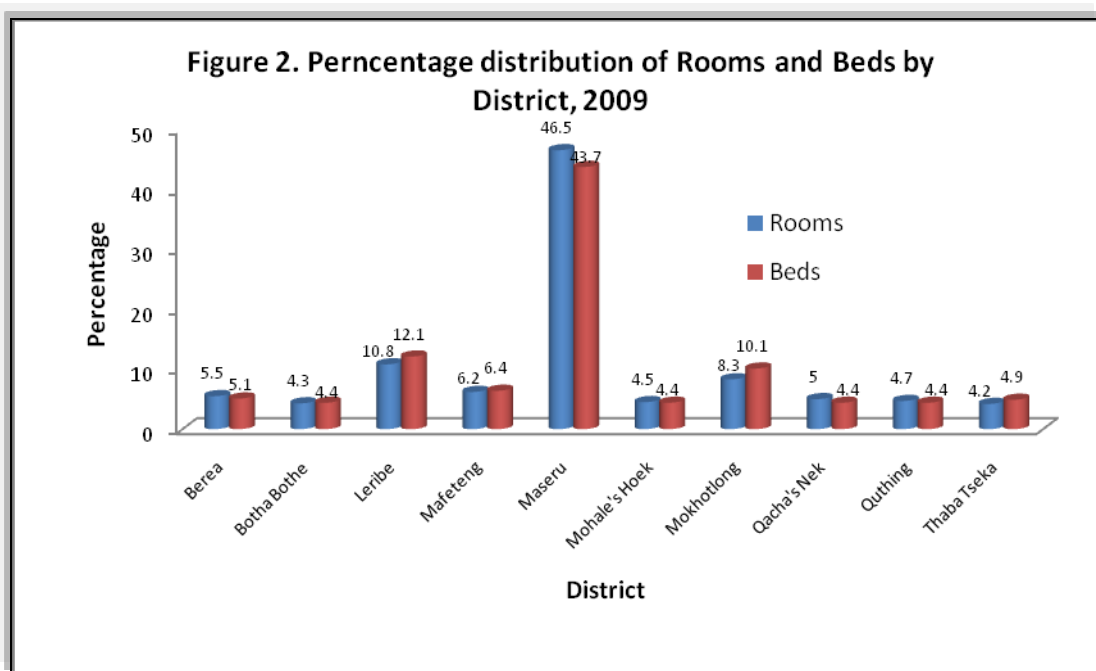
Table 2. Number of Rooms and Beds

Type of Establishment	2009	2008	2007
<i>Number of Rooms</i>			
Hotel	993	882	878
Lodge	584	537	466
Other	852	835	761
Total	2, 429	2, 254	2, 105
<i>Percentage Change</i>	7.8	7.1	
<i>Number of beds</i>			
Hotel	1, 770	1, 545	1, 520
Lodge	1, 080	1, 067	1, 045
Other	1, 941	1, 920	1, 785
Total	4, 791	4, 532	4, 350
<i>Percentage Change</i>	5.7	4.1	

Table 2 also shows that just like the Numbers of Rooms, the Number of Beds have also been increasing over the years. It shows that the Number of Beds increased by 4.1 percent during the year 2008 and then by 5.7 percent in during 2007. Accommodation Establishments falling under the category 'Other' had the highest Number of Beds even though they recorded the lowest Number of Rooms as compared to Hotels. This shows that there are some establishments with more than two (2) beds in a room. Lodges have always had the lowest Number of Rooms and beds since 2007.

Figure 2 below displays information on the distribution of Rooms and Beds by district in Lesotho. It shows that the majority of Rooms and Beds were in the Maseru districts, which accounted for 46.5 percent of the Rooms and 43.7 percent of the Beds in the country. This

may be an indication that most of the investments in Accommodation Establishments are in Maseru which is true because Maseru is the capital town of Lesotho and almost everything happens in Maseru.



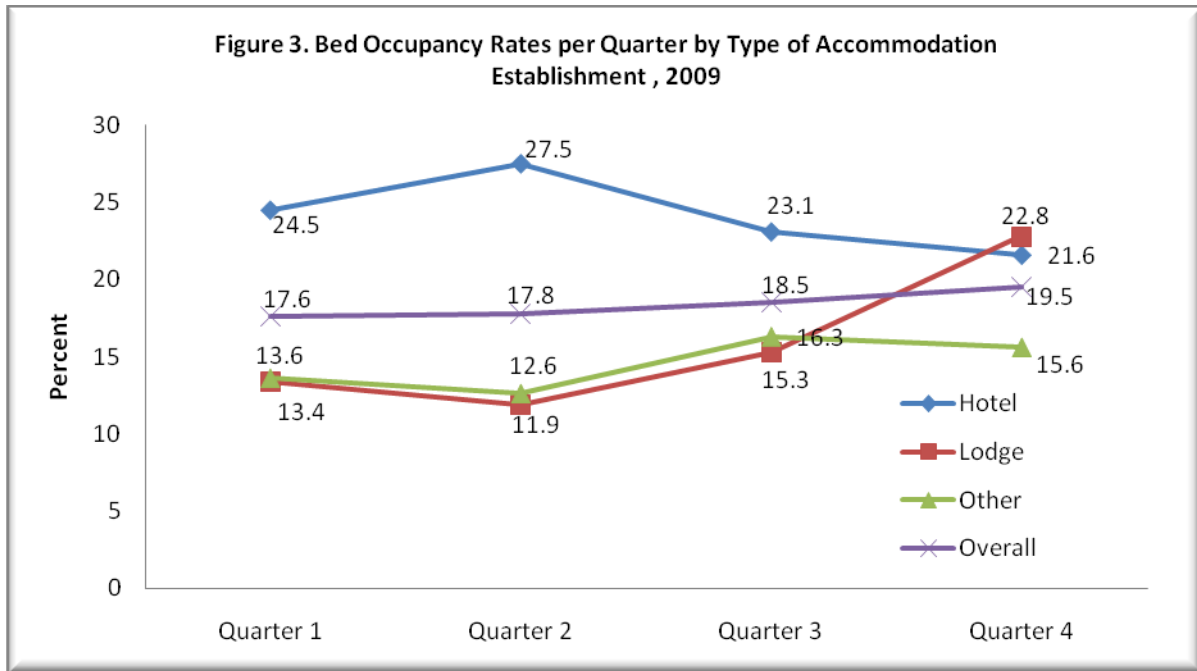
It can also be observed from the figure that Leribe and Mokhotlong recorded the second and third highest Number of Rooms and Beds while Botha Bothe accounted for the least Number of Rooms and Beds even though it had more Accommodation Establishments than the districts of Beraa and Mohale's Hoek. This shows that the Accommodation Establishments in Botha Bothe had the lowest capacity, although there are key Tourism Attractions such as Liphofung and Afir ski in that district.

Bed Occupancy Rate

Information on Occupancy Rates is important in Accommodation Establishments Statistics because they give a picture of the utilization of Accommodation Establishments for their main purpose being provision of accommodation. In 2009, the overall national Occupancy Rate was 17.9 percent, which is lower than what was recorded in 2008. Figure 3 below, shows that during the four quarters of 2009, Hotels acquired the highest Occupancy Rates. The highest rate was 27.5 percent during the second quarter and the lowest being 21.6 percent during the fourth quarter. It also shows that Lodges recorded the lowest Occupancy Rate during the first three quarter and then had the highest Occupancy Rate of 22.8 percent amongst all type of establishment during the fourth quarter of 2009

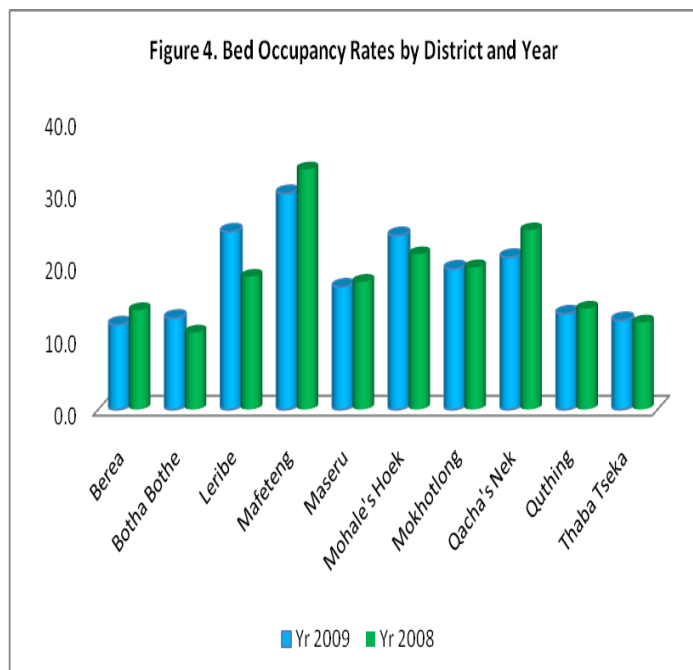
The overall Occupancy Rates for the four quarters increased from 17.6 percent during the first quarter to 17.8 percent for the second quarter then 18.5 percent in the third quarter and then the highest Occupancy Rate of 19.5 percent in the fourth quarter of 2009. This

might have been caused by the sharp increase in the Occupancy Rate of Lodges even though that of Hotels decreased by about 2 percent.



Accommodation Establishments that fall under the category 'Other' accumulated an Occupancy of 13.6 percent during the first quarter which decreased to 12.6 percent in the second quarter increasing to 16.3 percent during the third quarter and then decreased to 15.6 percent in the fourth quarter. This picture shows that, even though 'Other' types of establishments were in the majority, their usage for purpose of accommodation was the lowest.

Looking at the Bed Occupancies by District and comparing them for the years 2008 and 2009, Figure 4 shows that Mafeteng experienced the highest Occupancy Rate for the two years, followed by Mohale's Hoek and Qacha's Nek respectively. Botha Bothe and Thaba Tseka had the lowest Occupancy Rates. It should be noted that in all districts, except for Botha Bothe, Leribe and Mohale's Hoek, the 2009 Occupancy Rates were lower than those recorded in 2008, which indicates a decline from the previous years.



Revenue

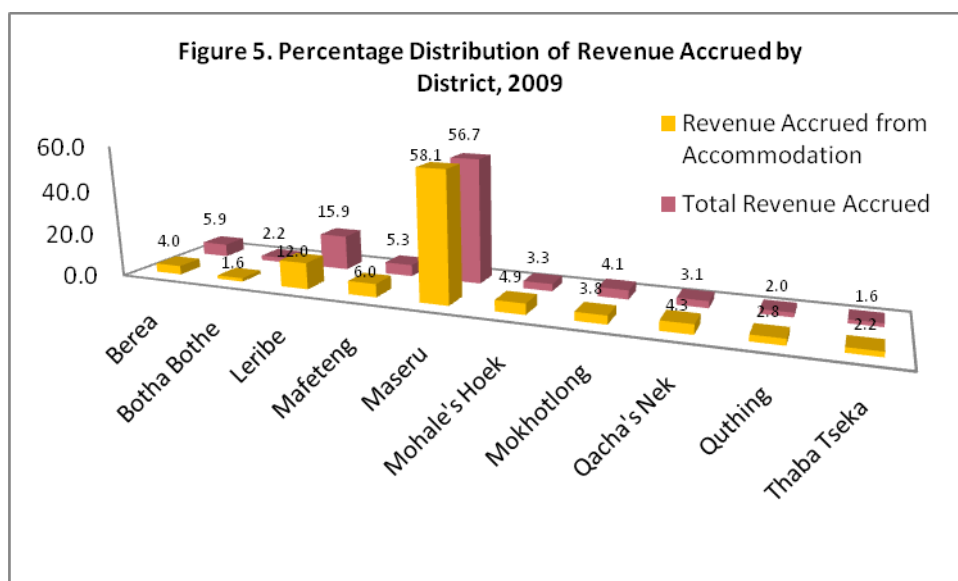
Information on the revenue accrued by Accommodation Establishments plays an important role in that, currently, this is the only component of tourism that assists in estimating the contribution of the tourism sector to the country's GDP. This analysis looks at the Revenue accrued for Accommodation only and the Total Revenue Accrued that is including revenue collected from accommodation, food and drinks, etc.

Table 3. Revenue Accrued by Accommodation Establishments, 2009

	Revenue Accrued from Accommodation	Total Revenue Accrued
Hotel	73 854 652	167 752 117
Lodge	23 428 992	47 357 137
Other	19 106 986	28 008 152
Total	116 390 539	243 112 406

In 2008, Accommodation Establishment recorded a Total Revenue of about M207 million whereby less than 50 percent of the Revenue was collected from accommodation meaning that most of the money accrued was from other services other than accommodation such as food and beverages, drinks etc. Table 3 shows that the Total Revenue Accrued in 2009 was about M243 million, indicating an increase of about M36 million as compared to the previous year. Hotels had the highest share of M167 million followed by Lodges and then 'Other' types of Accommodation Establishments with M47 million and M28 million respectively.

Figure 5 below displays the percentage distribution of the Revenue Accrued from Accommodation and the Total Revenue Accrued by District.



The figure shows that Maseru accounted for over 58.1 percent of the Revenue Accrued from Accommodation and 56.7 percent of the Total Revenue Accrued by Accommodation Establishments in 2009. Accommodation Establishments in the Leribe district came second accounting for 12.0 percent of the Revenue Accrued from Accommodation and 15.9 of the Total Revenue Accrued. Botha Bothe accounted for the lowest proportion under Revenue Accrued from Accommodation while Thaba Tseka took the smallest share under Total Revenue Accrued.

Mafeteng had the highest Bed Occupancy Rate, however, it accounted for only 6.0 percent of the Revenue Accrued from Accommodation. This might be an indication that the establishments in that district have a lower carrying capacity hence why the highest Occupancy Rate and low contribution to the Revenue Accrued from Accommodation.

Employees

The information collected at Accommodation Establishments also include the number of people employed in the sub- Sector. Employment is another means of alleviating poverty and therefore it is important to monitor the sector's input in this regard. Table 4 below shows that there were 2, 626 Employees in Accommodation Establishments in 2009, showing an increase of about 431 Employees compared to what was recorded in 2008.

The table goes on to show that the majority of Employees, that is 62 percent, were found in Accommodation Establishments in the Maseru district. This goes in line with the previous observations that the majority of Accommodation Establishments were found in Maseru and also the fact that more than 50 percent of the Revenue Accrued was in the maseru district.

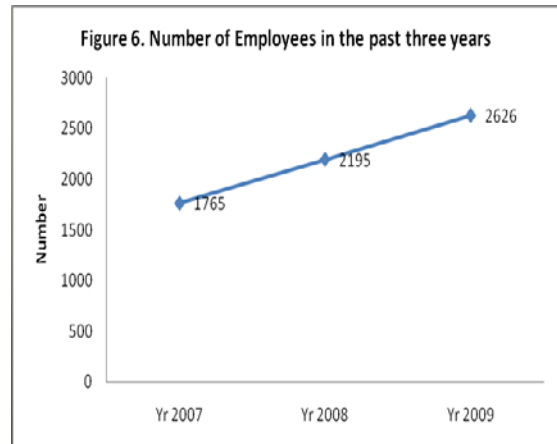
Table 4. Number of Employees in Accommodation Establishments by Type of Establishment and District, 2009

District	Hotel	Lodge	Other	Total	% Share
Berea	101	-	21	122	4.6
Botha Bothe	37	28	11	76	2.9
Leribe	103	64	34	201	7.7
Mafeteng	59	28	33	120	4.6
Maseru	1 198	223	206	1 627	62.0
Mohale's Hoek	72	-	25	97	3.7
Mokhotlong	57	18	57	132	5.0
Qacha's Nek	20	16	43	79	3.0
Quthing	25	19	41	85	3.2
Thaba Tseka	17	22	48	87	3.3
Total	1 689	418	519	2 626	100.0
% Share	64.3	15.9	19.8	100.0	

It also shows that 64.3 percent of the employees were employed by Hotels even though they were few in number. The Hotels were then followed by 'Other' types of

Accommodation Establishments which accounted for 19.8 percent of employees and the Lodges with 15.9 percent.

Figure 6 below shows that the number of Employees in Accommodation Establishments has been growing constantly over the past three (3) years. It shows that there were 1765 employees in 2007, growing to 2195 in 2008 a difference of about 24 percent increase and then 2626 in 2009. It showed be stated that the increase between 2007 and 2008 was higher than the occurred between 2008 and 2009 because the number of Employees increase by 19 percent between 2008 and 2009.



Summary

The analysis of the 2009 Accommodation Statistics shows that there was an increase in the number Accommodation Establishments which meant that the number of Rooms and Beds will increase. However the Bed Occupancy Rates declined as compared to what was recorded in 2008. However, despite in decrease in Bed Occupancy Rates, the Revenue Accrued from Accommodation only and the Total Revenue Accrued increased by about 17 percent. The