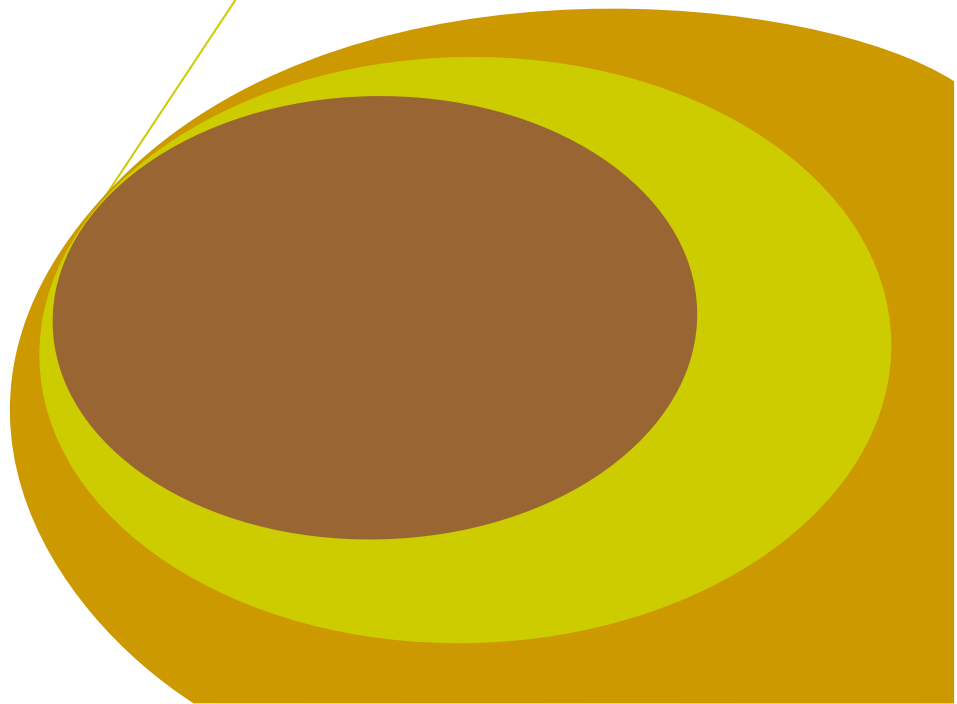
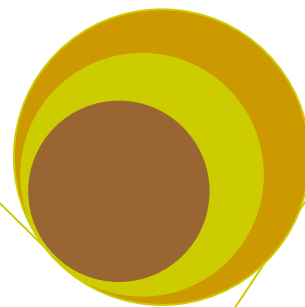
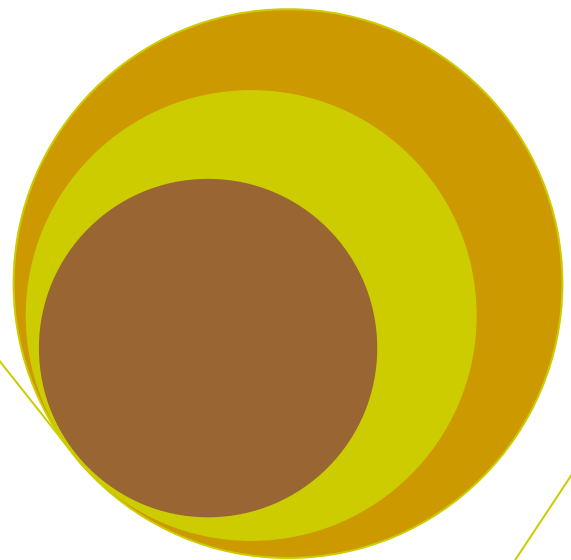




## 2009 VISITORS' ARRIVAL STATISTICS REPORT

LESOTHO  
TOURISM  
DEVELOPMENT  
CORPORATION

*RESEARCH AND DEVELOPMENT  
MARCH 2010*



# Lesotho Tourism Development Corporation

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# Introduction

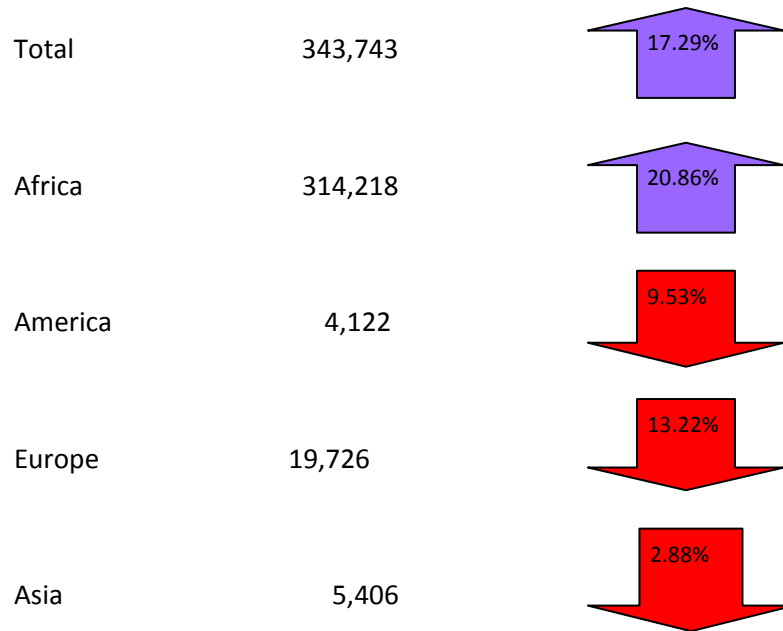
The report presents an overview of the performance of the tourism sector in terms of visitors' arrivals to Lesotho. The data used for analysis was collected through the use of entry/departure cards at 9 ports of entry namely, Caledon'spoort, Moshoeshoe I International Airport, Vanroyeen's Gate, Maputsoe Bridge, Sani Pass Border Post, Peka Bridge, Tele Bridge, Makhalleng Bridge and Maseru Bridge. The analysis in this report covers Length of Stay, Country of Residence, Age, Sex, Major source Markets for arrivals to Lesotho and Purpose of Visit.

# Limitations

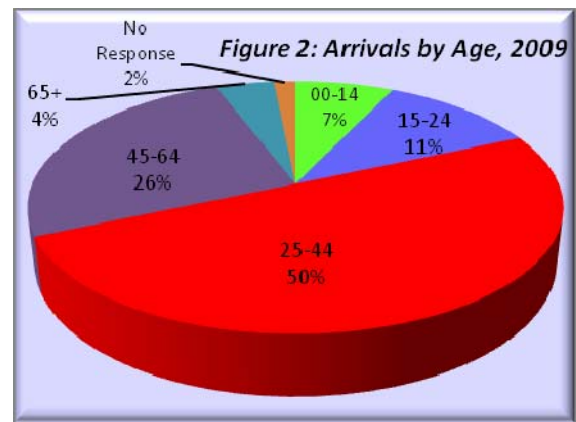
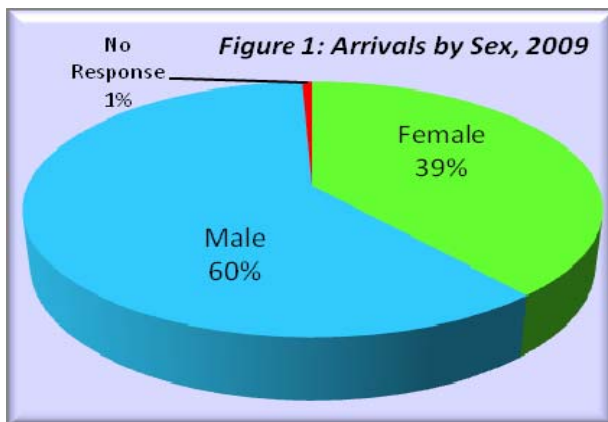
Entry/Departure cards used to collect data at ports of entry do not have specific classification for people visiting friends and/relatives. As a result, visitors who came to visit friends and/relatives were classified under the category of "Other" also, some of them if not assisted by Border Officials, classified themselves as Returning Residents therefore, care should be taken when quoting figures on purpose of visit. Information on Length of Stay is based on intended not the actual Length of Stay.

# Main Findings

## Overview of 2009



Foreign arrivals to Lesotho in 2009 achieved a growth of 17.29 percent in comparison to 2008 with 343,743 visitors. This growth resulted from an increase of 20.86 percent of arrivals from Africa which was driven by a 21.77 percent (54,106 more visitors) increase in arrivals from South Africa. On the contrary, arrivals from America, Europe and Asia decreased by 9.53, 13.22 and 2.88 percent respectively in 2009. This could be the result of the global economic downturn experienced in 2009.



Analysis of arrivals by Sex and Age is presented in Figures 1 and 2 above which show that, approximately two thirds of visitors were males while female visitors were slightly more than one third. Age wise, half of visitors were aged between 25 and 44 years followed by those aged 45 to 64, 15 to 24, 0 to 14 then by those aged 65 and above.

Month

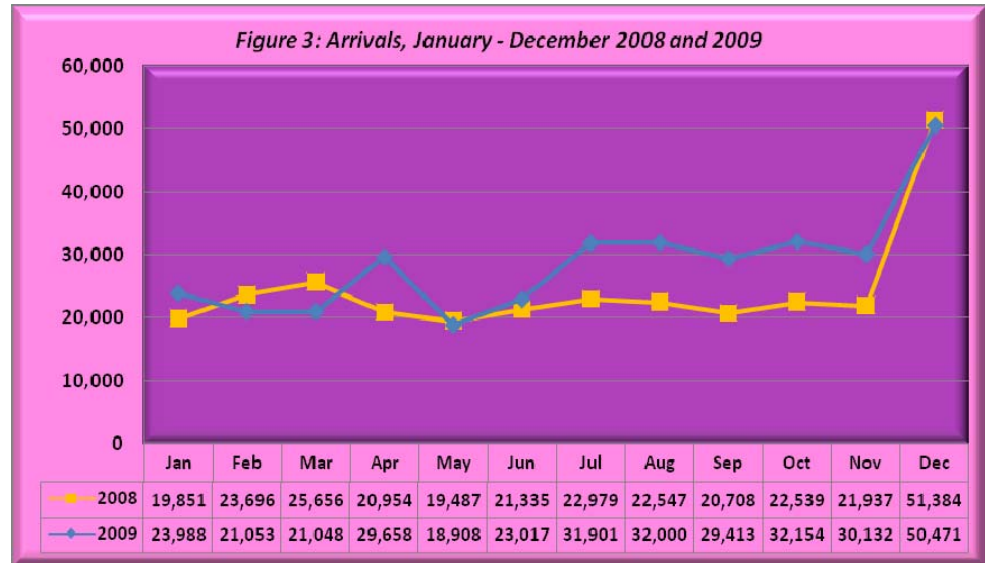


Figure 3 above portrays that the arrivals did not digress much from month to month thereby representing a moderate fluctuating trend throughout the months with peaks in April and December due to Easter and Christmas holidays. A considerable increase was also observed between May and July.

**Purpose of Visit**

Holiday	125,900	36.63%
Business	39,860	11.60%
Employment	2,085	0.61%
Returning	1,529	0.45%
School	467	0.14%
Other	170,478	49.59%
No Response	3,424	1.00%

A greater share (49.59 percent) of visitors to Lesotho during 2009 came for Other purposes. This probably includes large numbers of visitors from South Africa who came for visiting friends and relatives. That is because; the arrival form that is used to collect the information does not have provision for visitors to indicate if they are visiting friends and relatives. A significant proportion of 36.63 percent of visitors came for holiday. However, this presented a decline of 1.15 percent as compared to 2008 while 13.15 percent of visitors came for business and presented an increase of 1.55 percent.

**Intended Length of Stay**

Day Visitors	23,863	6.94%
1-3	129,068	37.55%
4-7	53,519	15.57%
8-14	50,876	14.77%
15-28	6,669	1.94%
29-56	79,097	23.01%
57-91	411	0.12%
92+	34	0.01%
No Response	259	0.08%

The majority (37.55 percent) of visitors who stayed 1 to 3 nights followed by those who stayed 29 to 56 nights with 23.01 percent of the total visitors then by 15.57 percent of visitors who stayed 4 to 7 nights.

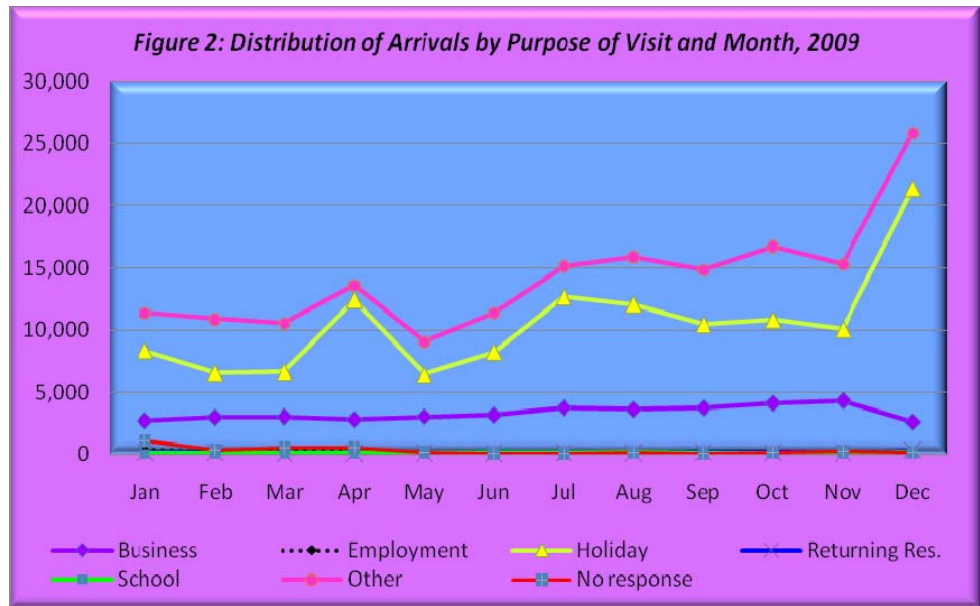
7 nights and those who stayed 8 to 14 nights with 14.77 percent. The Average Intended Length of Stay increased from 9 to 12 nights between 2008 and 2009.

Source Markets		
South Africa	302,444	91.27%
Germany	5,015	1.51%
United Kingdom	4,619	1.39%
Zimbabwe	4,510	1.36%
Holland/Netherlands	4,255	1.28%
United States	3,212	0.97%
China	2,233	0.67%
Botswana	2,060	0.62%
Swaziland	1,405	0.42%
Zambia	806	0.24%
Canada	805	0.24%

Comparison of the Top 11 Source Markets for arrivals to Lesotho above shows that, South Africans took the lead with 91.27 percent, followed by Germans with as little as 1.51 percent of the total arrivals from the 11 Top source markets. Canada was last with 0.24 percent.

# Purpose of Visit

Month



Analysis by Purpose of Visit above indicates that, the majority of people who came to Lesotho for Other purposes were dominant throughout the year. The volume of holiday visitors as compared to other purposes of visit was also notable with a fluctuating trend between 8,000 and 12,600 visitors from January to November and as high as 21,419 visitors in December.

On the other hand, business visitors assumed a stable trend of less than 5,000 visitors between January and December with a slight drop observed in December. Visitors who came for employment and school accounted for the lowest numbers each month throughout 2009.

## Average Length of Stay

Holiday	10 nights
Business	7 nights
Employment	11 nights
Returning	13 nights
School	15 nights
Other	14 nights
No Response	10 nights

The figures show that scholars spent more nights (15 nights) even though they were not many in number. This was followed by those who came for Other purposes (including those who came for visiting friends and relatives) with 14 nights and then by returning residents with 13 nights. Visitors who came for employment purposes spent 11 nights while those who came for business spent the lowest number of nights (7 nights). The Average Length of Stay for holiday visitors was calculated as 12 nights. This represents an increase of 3 nights as compared to 2008.

Source Markets	Business	Employment	Holiday	Returning	School	Other	No response	Total
South Africa	91.15	91.90	85.16	94.90	89.76	95.56	94.12	91.28
Germany	0.41	0.20	3.74	0.20	0.00	0.22	1058	1.51
United Kingdom	1.08	0.75	2.94	0.54	1.99	0.39	0.70	1.39
Zimbabwe	1.78	1.56	1.46	1.34	0.88	1.20	0.97	1.36
Holland/Netherlands	0.25	0.00	3.29	0.13	0.44	0.14	0.52	1.28
United States	1.55	1.96	1.49	0.94	5.52	0.45	0.64	0.97
China	1.28	2.67	0.27	0.54	0.88	0.79	0.97	0.67
Botswana	0.78	0.50	0.62	0.67	0.00	0.60	0.09	0.62
Swaziland	0.88	0.10	0.47	0.13	0.44	0.30	0.27	0.42
Zambia	0.58	0.25	0.18	0.40	0.22	0.21	0.15	0.24
Canada	0.27	0.10	0.39	0.20	0.00	0.14	0.00	0.24

**\*all figures are expressed as percentages of the total number of visitors from each individual category of purpose of visit of the top 10 source markets.**

The percentage of visitors from South Africa who came to Lesotho for “Other” purposes was high at 95.56 percent because of visitors who came for visiting friends and family who could not be precisely classified due to the format of the entry form used to collect the data. Considerable proportions of visitors from Germany, Holland and the United Kingdom came for Holiday purposes constituting 3.74, 3.29 and 2.94 even though they decreased as compared to the previous year. The same pattern was also observed in 2008 which shows that other than the other source markets, Germany, Holland and the United Kingdom are likely to boost the growth of tourism in Lesotho.

## Conclusion and Recommendations

The arrivals trend shows that, many visitors came to Lesotho for “Other” purposes which include large numbers of visitors who come to visit friends and relatives. On the other hand, the influx of Holiday and Business visitors also suggests that Lesotho has the potential to welcome even more visitors. The tourism sector in general should therefore be planned in a broad, multi-sectoral manner that focuses on economic and social aspects, infrastructure and tourism product development to attract more visitors and increase the length stay of visitors. In short, coordinated mechanisms have to be put in place to develop and improve basic road networks, electricity, communication, accommodation, entertainment as well as health facilities in all regions of the country. In this way, tourism in Lesotho would be more vibrant and visitors could stay longer in the country. This would not only benefit the tourism sector but other sectors as well. The Corporation therefore needs to foster and strengthen working relations with other institutions including those that are outside the tourism sector.

Proper planning and assessment of the sector’s development requires accurate and reliable information that will better inform planning, monitoring and evaluation. The tool that is used for collection of arrivals statistics should be revised to allow proper classification of visitors in terms of their purposes of visit and length of stay so as to precisely measure the tourism products’ needs. With the collection tool that is currently being used, visitors are not able to clearly indicate their purpose of visit unless they are assisted by border officials. Similarly, in terms of the length of stay; the information that is currently being collected is based on intended length of stay not the actual length of stay.

# ANNEXES

## 2008 Arrivals compared with 2009 Arrivals

January - December 2008 compared with January - December 2009				
Country	2008	2009	Difference	%
<b>Africa</b>	<b>259,811</b>	<b>314,219</b>	<b>54,408</b>	<b>20.94</b>
Botswana	1,796	2,060	264	14.70
Malawi	404	430	26	6.44
South Africa	248,548	302,655	54,107	21.77
Swaziland	1,361	1,406	45	3.31
Zambia	618	806	188	30.42
Zimbabwe	4,534	4,513	-21	-0.46
Other Africa	2,550	2,349	-201	-7.88
<b>America</b>	<b>4,556</b>	<b>4,122</b>	<b>-434</b>	<b>-9.53</b>
Canada	829	805	-24	-2.90
United States	3,520	3,212	-308	-8.75
Other America	207	105	-102	-49.28
<b>Europe</b>	<b>22,717</b>	<b>19,726</b>	<b>-2,991</b>	<b>-13.17</b>
Holland/Netherlands	4,995	4,257	-738	-14.77
Germany	6,469	5,017	-1,452	-22.45
United Kingdom	5,006	4,620	-386	-7.71
Other Europe	6,247	5,832	-415	-6.64
<b>Asia</b>	<b>5,565</b>	<b>5,406</b>	<b>-160</b>	<b>-2.87</b>
China	2,407	2,233	-174	-7.23
India	606	256	-350	-57.76
Taiwan	188	145	-43	-22.87
Other Asia	<b>2,364</b>	<b>2,772</b>	407	17.21
Middle East	385	177	-208	-54.03
No Response	40	93	55	144.74
<b>Total</b>	<b>293,074</b>	<b>343,743</b>	<b>50,670</b>	<b>17.29</b>

## Arrivals by Purpose of Visit and Length of Stay, January – December 2009

Purpose	Length Of Stay									
	Day Visitor	1-3	4-7	8-14	15-28	29-56	57-91	92+	No Response	Total
<b>Business</b>	2,245	23,700	5,270	2,798	593	5,120	67	4	63	39,860
<b>Employment</b>	219	758	333	296	58	391	15	1	14	2,085
<b>Holiday</b>	5,076	54,491	21,187	17,911	2,796	24,191	171	19	58	125,900
<b>Returning</b>	168	504	228	186	34	400	4	1	4	1,529
<b>School</b>	40	124	57	78	14	152	0	0	2	467
<b>Others</b>	15,928	48,022	25,866	29,005	3,088	48,256	188	8	117	170,478
<b>No Response</b>	187	1,469	578	512	86	587	3	1	1	3,424
<b>Total</b>	23,863	129,068	53,519	50,786	6,669	79,097	448	34	259	343,743

### Arrivals by Purpose of Visit and Age, January – December 2009

Purpose	00-14	15-24	25-44	45-64	65+	No Response	Total
Business	696	3,230	22,489	11,974	925	546	39,860
Employment	78	221	1,198	482	71	35	2,085
Holiday	10,712	15,529	58,338	31,790	7,767	1,765	125,900
Returning	112	211	706	448	41	11	1,529
School	73	209	133	42	3	7	467
Other	12,592	18,895	87,527	43,040	5,483	2,941	170,478
No Response	213	376	1,694	906	180	55	3,424
<b>Total</b>	<b>24,476</b>	<b>38,671</b>	<b>172,085</b>	<b>88,682</b>	<b>14,470</b>	<b>5,360</b>	<b>343,743</b>

### Arrivals by Country of Residence and Purpose of Visit, January – December 2009

Country	Purpose Of Visit							Total
	Business	Employment	Holiday	Returning	School	Other	No Response	
<b>Africa</b>	<b>37,049</b>	<b>1,913</b>	<b>105,224</b>	<b>1,476</b>	<b>422</b>	<b>164,948</b>	<b>3,187</b>	<b>314,219</b>
Botswana	299	10	738	10	0	1,000	3	2,060
Malawi	108	3	71	0	2	241	5	430
South Africa	34,833	1,827	101,288	1,415	412	159,773	3,107	302,655
Swaziland	336	2	557	2	2	498	9	1,406
Zambia	223	5	217	6	1	349	5	806
Zimbabwe	679	31	1,738	20	4	2,009	32	4,513
Other Africa	571	35	615	23	1	1,078	26	2,349
<b>America</b>	<b>703</b>	<b>43</b>	<b>2,309</b>	<b>17</b>	<b>25</b>	<b>1,001</b>	<b>24</b>	<b>4,122</b>
Canada	102	2	468	3	0	230	0	805
United states	591	39	1,768	14	25	754	21	3,212
Other America	10	2	73	0	0	17	3	105
<b>Europe</b>	<b>1,016</b>	<b>41</b>	<b>16,637</b>	<b>21</b>	<b>13</b>	<b>1,860</b>	<b>138</b>	<b>19,726</b>
Holland/Netherlands	95	0	3,910	2	2	231	17	4,257
Germany	155	4	4,443	3	0	360	52	5,017
United kingdom	411	15	3,495	8	9	659	23	4,620
Other Europe	355	22	4,789	8	2	610	46	5,832
<b>Asia</b>	<b>1,031</b>	<b>85</b>	<b>1,671</b>	<b>15</b>	<b>7</b>	<b>2,536</b>	<b>61</b>	<b>5,406</b>
China	489	53	322	8	4	1,325	32	2,233
India	63	11	56	3	1	121	1	256
Taiwan	57	0	40	1	0	45	2	145
Other Asia	422	21	1,253	3	2	1,045	26	2,772
Middle east	42	0	29	0	0	102	4	177
No response	19	3	30	0	0	31	10	93
<b>Total</b>	<b>39,860</b>	<b>2,085</b>	<b>125,900</b>	<b>1,529</b>	<b>467</b>	<b>170,478</b>	<b>3,424</b>	<b>343,743</b>

### Arrivals by Country of Residence and Length of Stay, January – December 2009

Country	Length of Stay									Total
	Day Visitor	1-3	4-7	8-14	15-28	29-56	57-91	92+	Other	
<b>Africa</b>	<b>20,296</b>	<b>110,564</b>	<b>50,433</b>	<b>49,276</b>	<b>6,091</b>	<b>77,095</b>	<b>272</b>	<b>18</b>	<b>174</b>	<b>314,219</b>
Botswana	137	469	761	289	38	364	0	0	2	2,060
Malawi	36	97	114	46	12	123	2	0	0	430
South Africa	19,352	107,853	47,764	47,863	5,747	73,684	217	18	157	302,655
Swaziland	60	335	506	152	27	323	3	0	0	1,406
Zambia	82	282	193	85	21	140	3	0	0	806
Zimbabwe	236	921	508	596	163	2,058	28	0	3	4,513
Other Africa	393	607	587	245	83	403	19	0	12	2,349
<b>America</b>	<b>211</b>	<b>2,030</b>	<b>658</b>	<b>443</b>	<b>182</b>	<b>511</b>	<b>57</b>	<b>11</b>	<b>19</b>	<b>4,122</b>
Canada	49	412	91	77	48	104	13	10	1	805
United States	143	1,558	558	357	131	402	44	1	18	3,212
Other America	19	60	9	9	3	5	0	0	0	105
<b>Europe</b>	<b>571</b>	<b>15,196</b>	<b>1,992</b>	<b>823</b>	<b>304</b>	<b>754</b>	<b>57</b>	<b>2</b>	<b>27</b>	<b>19,726</b>
Holland/Netherlands	64	3,691	340	69	32	54	6	0	1	4,257
Germany	112	4,211	387	136	56	108	5	0	2	5,017
United Kingdom	124	3,095	590	373	125	274	20	0	19	4,620
Other Europe	271	4,199	675	245	91	318	26	2	5	5,832
<b>Asia</b>	<b>2,680</b>	<b>1,212</b>	<b>412</b>	<b>228</b>	<b>89</b>	<b>685</b>	<b>58</b>	<b>3</b>	<b>39</b>	<b>5,406</b>
China	1,668	114	50	37	15	297	33	0	19	2,233
India	116	42	28	10	5	42	10	0	3	256
Taiwan	53	44	10	8	0	26	3	0	1	145
Other Asia	843	1,012	324	173	69	320	12	3	16	2,772
<b>Middle East</b>	<b>97</b>	<b>36</b>	<b>8</b>	<b>6</b>	<b>3</b>	<b>23</b>	<b>4</b>	<b>0</b>	<b>0</b>	<b>177</b>
<b>No Response</b>	<b>8</b>	<b>30</b>	<b>16</b>	<b>10</b>	<b>0</b>	<b>29</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>93</b>
<b>Total</b>	<b>23,863</b>	<b>129,068</b>	<b>53,519</b>	<b>50,786</b>	<b>6,669</b>	<b>79,097</b>	<b>448</b>	<b>34</b>	<b>259</b>	<b>343,743</b>