



UNLOCKING THE LESOTHO MARKET

BY SAT INSIGHTS UNIT
(Based on 2025 Data & Insights)



SOUTH AFRICAN TOURISM



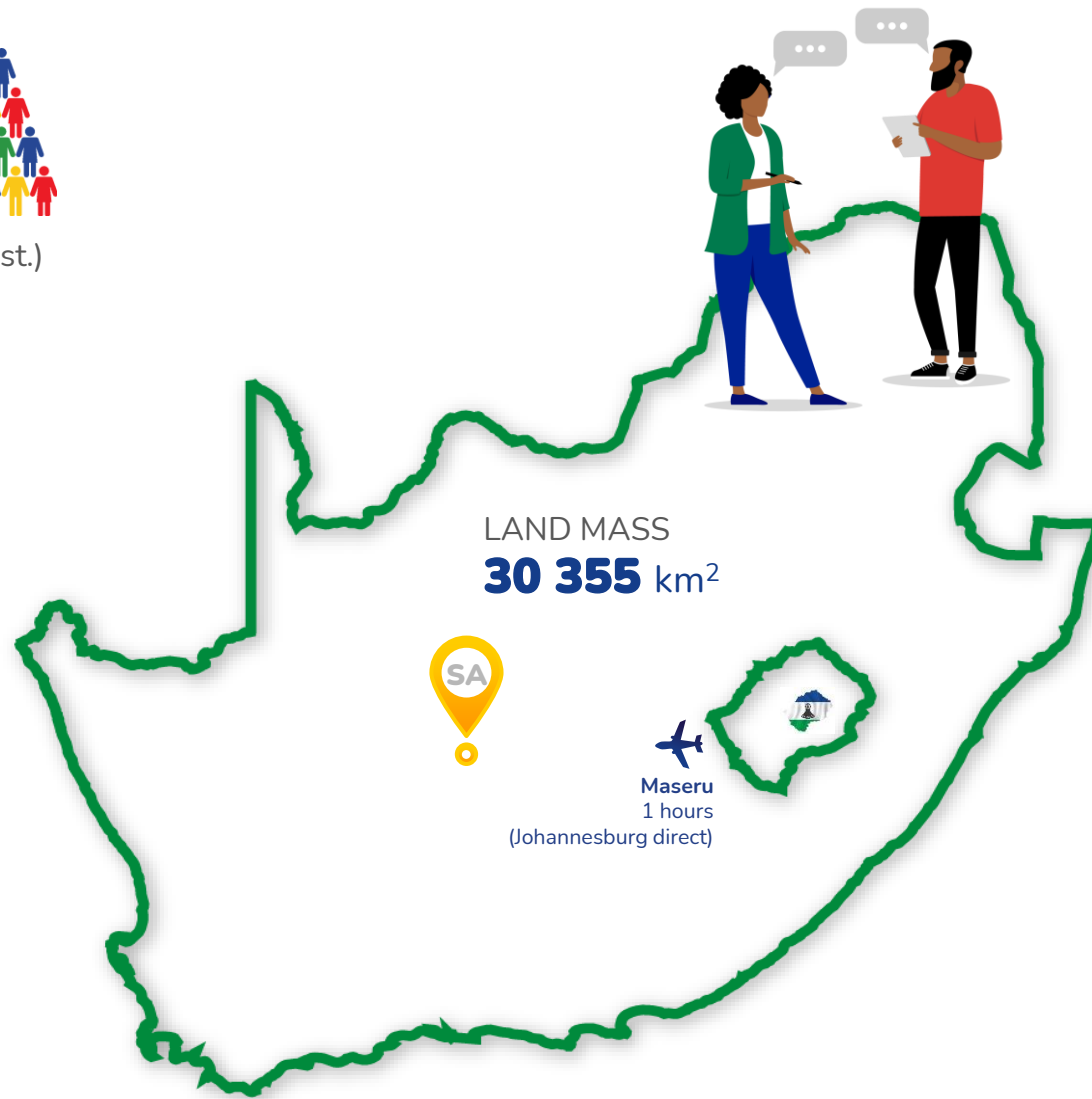
 SAT MPIF Primary Source Markets

Source: SAT Market Investment Framework



POPULATION (2025 Est.)

2.36-million

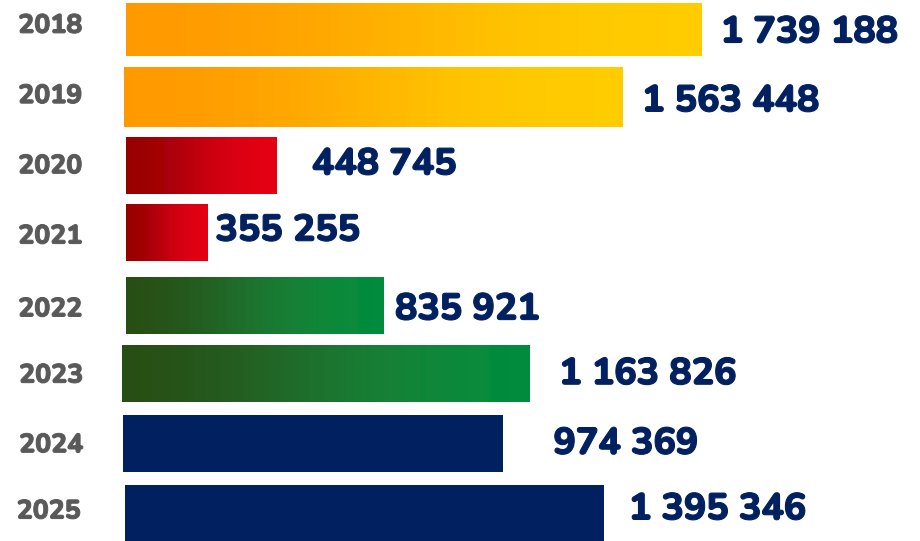


Lesotho facts

99% of arrivals to South Africa occur by land.

Lesotho's outbound travel for 2025 is estimated at **1.25 million**. South Africa has a Market Share of **97%**.

Lesotho travel trends



Growth Rate (2024 vs 2025): 43%

In 2025, total foreign direct spend from the Lesotho source market amounted to **R2,9 billion** a year-on-year decrease of 35,3%. The average spend per visitor decreased by 4,3%, dropping to **R2 200**.

Profile of Lesotho arrivals



Purpose of visit:
VFR and business shopping, as well as **Medical**.



Length of stay: 20 days



Free State is the #1 destination, followed by the Gauteng.



Mostly travel **alone**.



Most likely to be **female**.



More likely to be **repeat travellers** than first-time visitors.

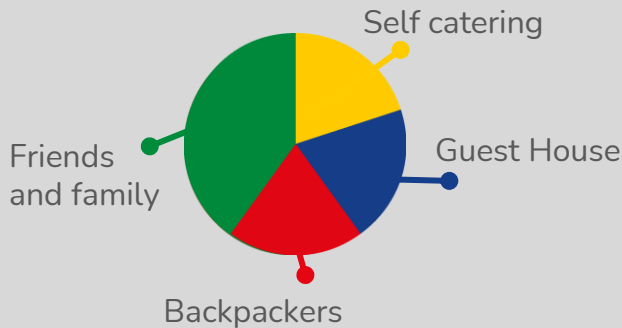
> 18
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Mostly **18 to 34** age brackets

± **R2 200**

On average, they spend **R2 200** per tourist

Where do Basotho travellers mostly stay?



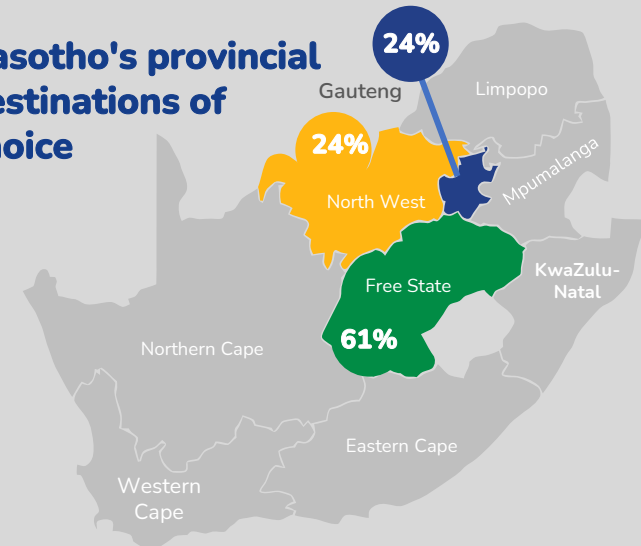
Basotho's preferred activities



Basotho's preferred attractions

Sandton City/ Mandela Square
Eastgate Mall
V&A Waterfront

Basotho's provincial destinations of choice



How Basotho first became aware of South Africa (Top 3)

- Saw an advertisement on TV
- Read about or saw photos of South Africa on community sites
- Informed by travel agent or South Africa was part of a travel package



Reasons for Visiting South Africa for Leisure

- Value for money
- Beautiful scenery
- Safari experiences



Reasons for Visiting South Africa for Leisure

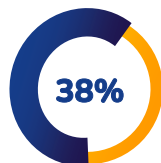
- Another appealing Destination
- Concerns for personal safety
- Uncertain about political climate/civil unrest

Brand Performance and Travel Behaviour

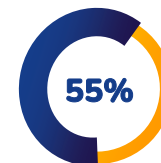


70% recall seeing advertisements about South Africa

How they plan and finalise trips to SA



38% Start planning about the destination 1 to 2 months before the trip.



55% finalise their trip to the destination less than a month before the trip.

South Africa's Top 4 Competitors in Lesotho



Tanzania



Mauritius



Botswana



UAE

#8



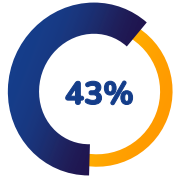
South Africa is the Lesotho's #8 market for **Welcoming People You Can Interact with**

#9

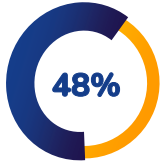


South Africa is the Lesotho's #9 market for **being enriching**

Role of Media Channels



43% rely on **Travel agent/tour operators** when selecting a destination



48% use **Travel agent/tour operators** to make their travel bookings



Channels used when researching a trip (Top 5)



20%
Friends/family



33%
Social media/
instant
messaging
services



11%
Travel Books/
Magazines



33%
Travel review
websites



43%
Travel agent/tour
operators

Channels used/referred to when booking a trip (Top 5)



48%
Travel
agent/tour
operators



14%
Online travel
aggregators



13%
Social media/
instant
messaging
services



19%
Friends/family

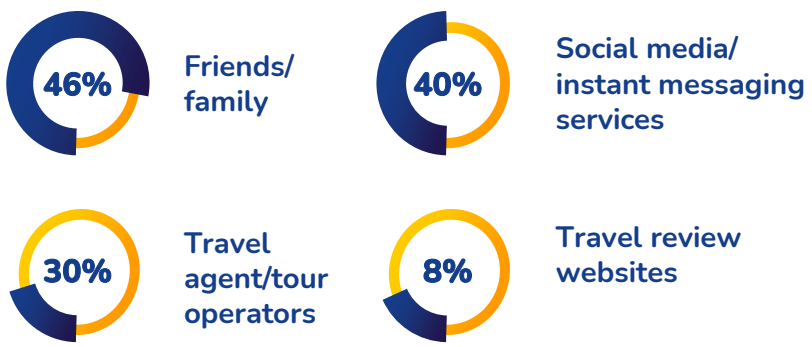


15%
Website of the
airline/hotel

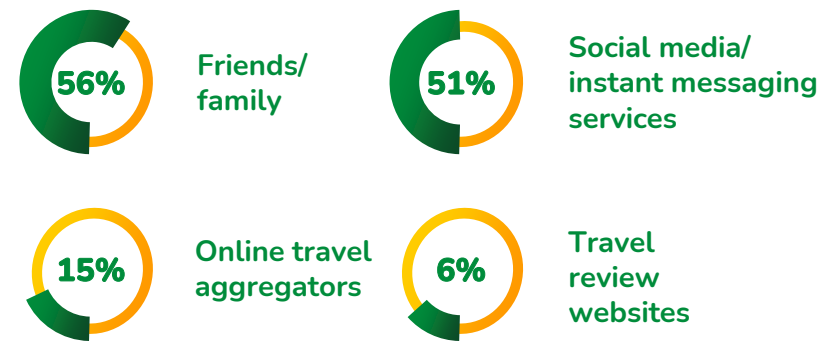
Role of Media Channels



Channels used to share holiday experience during trips



Channels used to share holiday experience after trips



Opportunities that would speak to the Lesotho market



I WANNA BREAK FREE - Travel is a therapeutic, refreshing and rejuvenating experience for them. It is a way for them to treat themselves and be pampered. They get to escape to tranquil spaces where they get to be immersed in the surroundings.



IMMERSE MYSELF IN CULTURE

They like to travel to experience the unique culture at the destination from the food, dress, dance, life to the nightlife.



FAMILY BREAKAWAY THAT ENGAGES THE KIDS

Family is a priority and travelling with their family reflects this.



THINK NEW, DO NEW, BE NEW

- Travel allows them to think outside the box, get exposed to and learn new things when travelling, which changes their mindset and comes back with a different perspective in life.



I WANT TO BE WHERE THE ACTION IS

- They need many things to do that include a nightlife and shopping experience as well as nature and active adventure like hiking and swimming.

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