

Tourism Marketing Plan Mozambique Promotion Programme

by Tourism Intelligence International
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Preliminary Report with Survey Results

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EXECUTIVE SUMMARY

I. Background

The travel and tourism industry provides direct and indirect employment for 212 million people world-wide and generates US\$655 billion in government revenue. Travel and tourism is responsible for 11.7 % of direct and indirect world GDP and generated more than US\$3.5 trillion of gross output. By 2005, the travel and tourism industry will create one job every 2.5 seconds, predicts the *World Travel and Tourism Council* (WTTC).

Between 1950 and 2002 the number of international arrivals has shown an evolution from a mere 25 million in 1950 to 703 million in 2002. This corresponds to an average annual growth rate of approximately 4%. International tourist arrivals will top 1 billion in 2010 and reach 1.6 billion in 2020, estimates the *World Tourism Organization*.

The terrorist attacks of September 11th pushed the American economy, and indeed many economies, into recession. September 11th eroded consumer confidence in travel. The traumatic blow delivered to US leisure travel – even domestic travel – could not be compared to the Gulf War, Kosovo, or any other military event because nothing like this had ever happened to America (*Impact of Terrorism on World tourism, Tourism Intelligence International, November 2001*). Recovery took longer in the US than in other markets such as Britain and Germany.

As if the blow of September 11th and the war in Iraq are not enough, the radically transforming travel and tourism industry pose another set of challenges for Mozambique. The international tourism industry has been undergoing rapid and radical transformation – a transformation driven largely by the experienced and demanding consumers, on the one hand, and by information technologies (IT), on the other. New technologies are challenging tourism destinations around the world to get on line or get out of business. For in today's marketplace, if you are not on line, you are not on sale!

In addition, the travel and tourism industry is increasingly competitive. China, Vietnam and the former Eastern Europe are all discovering the benefits to be had from the tourism sector; Space (the Moon, Mars, Venus) is being opened up for travel and Virtual Reality tours are already in existence. Competitors are increasingly coming from outside the industry – from pharmacies and post offices to software companies and the new dot.coms – there is a growing battle for the share of the travel and tourism pie.

In 2002, international tourist arrivals to Africa increased 3% to 29 million which represented 4.1% of world international tourist arrivals – a relatively small amount when one considers that North America receives 11.6%, Asia and the Pacific receives 18.7%, Europe receives 56.9% and the Middle East receives 3.9% of world international tourist arrivals.

The average annual growth rate for all international tourist arrivals between 2000 and 2002 was 1.1%, however, for the same period, the average annual growth rate for international tourist arrivals to Africa was 3%. This contrasts with average annual growth rates for international tourist arrivals to North America of –5.4%, to Asia and the Pacific of +6.75%, to Europe of +0.9% and to the Middle East of +7.7%.

With respect to international tourism receipts, of the US\$474.2 billion generated in 2002, Africa received 2.5% while North America received 17.9%, Asia and the Pacific received 20%, Europe received 50.7% and the Middle East received 2.7%.

North Africa receives 35% of international arrivals to Africa while Southern Africa receives 30%. The rest is split between East and West Africa. Mozambique receives just over 1% of the tourism arrivals to Africa.

Located in southern Africa on the Indian Ocean, Mozambique is famous for its coastal areas/beaches and Coral Reefs. Its geography is mainly the coastal area with reefs, interior flat lands with mountains in the north. Mozambique Island, off the coast of Nacala Province, is a United Nation Heritage Site. Portuguese is the main language and Maputo is the capital. The most important rivers are the Zambezi flowing southeast across the centre of Mozambique into the Indian Ocean, the Limpopo in the south, the Save in the middle and the Lugfenda in the north. The most important lake is the navigable Lake Niassa.

The Government of Mozambique has promoted Mozambique as key tourist destination in southern Africa. To strengthen this initiative, the Government has prepared a tourism policy that establishes general principles for recovery and modernization of tourism facilities, improvement of strategic development zones, and guidelines for private sector development. The Government has put in place institutional framework to support tourism development. It has a Ministry responsible for tourism development and four directorates, for tourism approvals and licenses, protected areas, promotion and marketing, and development co-operation respectively.

In order to support tourism development and face the challenges and developments at the global level Mozambique will need to aggressively market and position itself for leadership in the development of sustainable and competitive tourism sectors.

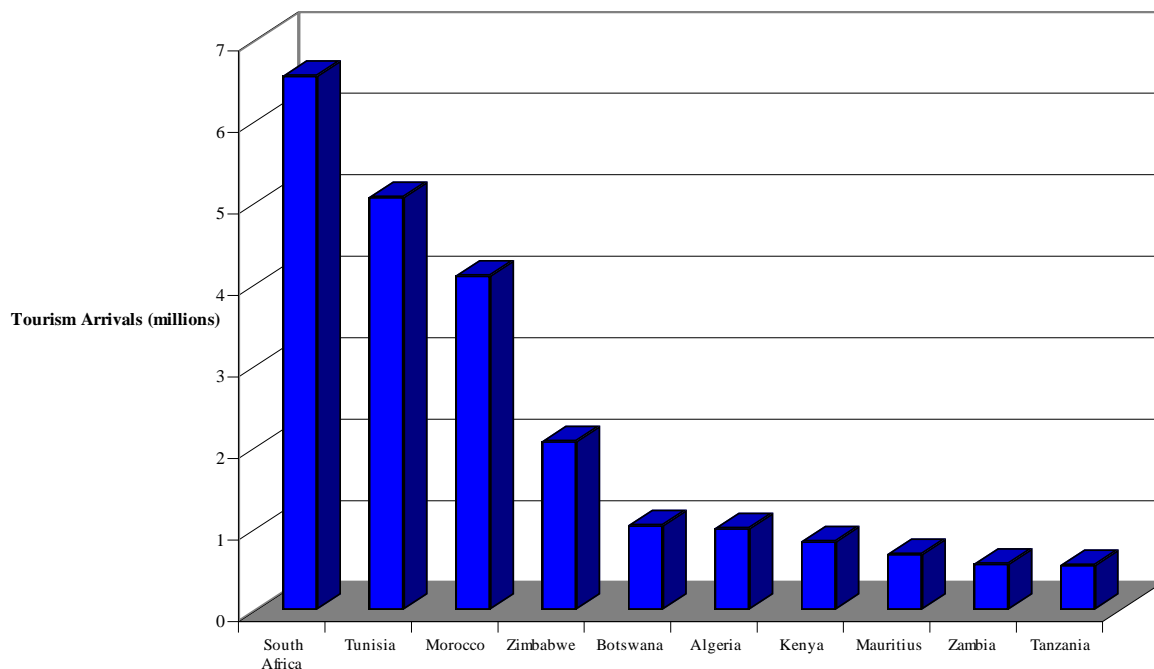
II. Introduction

In recent years, Mozambique has shown growth in tourist arrivals. In 2001, about 400,000 visited Mozambique, as compared to 240,000 in 1999. Most arrivals were from the South African market and in 2001, about 77 per cent of all arrivals came from South Africa, 13 per cent from Europe, mainly Portugal, 2 per cent from America and 8 per cent from other countries. The most visited areas were Ponta do Ouro, Maputo City, Bilene, Vilanculo, Inhambane and the Bazaruto Archipelago and Pemba.

In 2002, Mozambique registered 942,885 visitor arrivals according to the *National Institute of Statistics*, more than double the figures of 2001. This represents 135% growth in arrivals, however we view these statistics with caution as the rationale for this growth is not evident.

Mozambique is competing with the rest of Africa for tourism arrivals (see figure II.1) and therefore needs to market and position itself uniquely.

Figure II.1 - Tourism Arrivals to Top Ten African Destinations



Source: World Tourism Organisation, Tourism Market Trends Africa 2003 Edition

According to WTO Compendium of Tourism Statistics, Southern Africa regionally is on the upswing for tourism growth with South Africa, Botswana Lesotho and Swaziland getting the biggest market share of this growth.¹ WTO further bullishly predicts that Southern Africa collectively will grow by 300% in tourism arrivals by 2020.

In Sub-Saharan Africa, tourism is expected to generate 4% of the region's GDP by 2010. This therefore makes tourism an alternative strategic imperative for poverty alleviation, job creation, generation of foreign exchange and contribution to balance of payments. Tourism is not only a precursor for trade but for investment.

¹ WTO classifies Tanzania, Zambia and Zimbabwe as East Africa

In Mozambique however, tourism only contributes 1.2% to GDP compared to 8% for South Africa. Given the very fundamental characteristic of tourism as a job creator, the industry's potential could strategically add value to the economy once its potential has been fully harnessed and exploited. Tourism has the comparative advantage of creating significant employment for women, unskilled workers and SMME's. A further advantage is that tourism can flourish in marginally arid or unproductive geographical areas.

Global trends indicate that long haul destinations with a product mix of bush/beach experience, eco-tourism, different and diverse cultures command a competitive advantage over destinations that do not possess these holiday experiences. Naturally the consumer or customer proposition becomes the unique selling proposition.

Mozambique is therefore well-poised to take advantage of the growth in tourism arrivals to the southern African region. South Africa received 6.5 million arrivals in 2002 which was 10.9% growth over 2001 figures. Already South Africa provides the most visitors to Mozambique. Mozambique can also tap into the main markets that visit South Africa namely UK, Germany, France, Italy, Netherlands, Canada and Australia.

ADVERTISING

Mozambique currently advertises in the following countries: South Africa, UK, USA, Portugal and locally.

Institutionally there are three organizations doing or performing the same functions which are *Department of Promotion and Marketing Futur and Marketing Commission*. Meetings were held with all three. What seems to be coming out is that there is duplication of both responsibilities and effort in the way they are structured and how they operate. They both report to the minister and are tasked to promote and project a favourable image of Mozambique but their scope of responsibility is not all fully encompassing to engage in proper marketing mix. The Mozambican tourism industry is still very much in its infancy and a coherent strategy to drive and mobilize the fragmented industry is imperative so as to lobby or speak with one voice and therefore derive some synergy. Let me hasten to add that this is not factoring in the presence or value which the Marketing Commission might add. It is interesting the Dept of Promotion and Marketing talks of a budget of \$100,000 for all their promotional and marketing activities including collaterals, Futur which is the private sector/public sector body with 3 private sector body members and 2 public sector board members is very bullish about its spending pattern talking about a proposed budget of \$4,500,000 for 2005. Futur also talks of the activities they are carrying out such as the 5 travel fairs they encourage their members to attend and are critical about how and where collaterals are produced with no due regard to cost efficiencies and market needs. Futur although they report to the Minister of Tourism are seeking audience with him because they perceive overlap and duplication of responsibilities. Futur do not as yet have a business plan or a strategic plan but claim that they are working on it. The current board has been in office since July last year. When I had a meeting with the Vice -President of Futur also managed to fill in a questionnaire.

CUBAN Marketing Consultancy - This is a bilateral donor funding between Cuba and Mozambique. Potentially there seems to be an overlap between what we are doing and what the Cuban is carrying out as well. The project is for a period of one year subdivided into three

segments: phase one is the framework phase two is SWOT Analysis emphasising product analysis and tourist arrivals which will culminate in phase 3 which is a Strategic Awareness Campaign for Mozambican tourism product. The awareness campaign targets internal stakeholders like the Ministry then it will be rolled out to external stakeholders like international tour operators. It has to be said though that to date their assignment has been desk research a point which was reinforced by the Future Vice President. Again we need to exercise caution at this early stage that we don't draw wrong conclusions and we steer away from what they are doing if we are going to come out with an added value document which will power tourism growth in Mozambique.

III. Current Marketing Situation

In order to get a realistic assessment of the current marketing situation in Mozambique, Tourism Intelligence International (TII) launched surveys for the British, Portuguese, German and Southern African tour operators. In addition, TII also did a destination survey in Mozambique among the tourism stakeholders which assessed the current status of the tourism industry and the image from Mozambique's perspective. The results of these surveys are provided in the following sections.

III.1 UK Tour Operator Surveyed

There are more than 330 Tour Operators in the UK that feature Southern African as a tourist destination. Approximately 10% (35) of these Tour Operators, have been identified to include Mozambique in their programme.

The great majority of the UK Tour Operators that sell Mozambique surveyed are small specialists to Africa, but also includes:

- general adventure travel/trekking specialists (e.g. Wildlife Worldwide, World Odyssey, Worldwide Journeys & Expeditions);
- general luxury travel specialists (e.g. Abercrombie & Kent, Audley Travel, Cox & Kings, Roxton Bailey Robinson, Western & Oriental);
- an upmarket generalist (Sunvil);
- a long-haul generalist (Kuoni); as well as
- a flight specialist (E-bookers); and
- a dive specialist (Regal Dive).

Of the 35 Tour Operators surveyed, 25 questionnaires were completed and the following additional contacts were made to complete the survey:

- 2 Associations, i.e. Africa Travel & Tourism Association (ATTA) and Southern Africa Travel Organisers' Association (SATO);
- 3 Suppliers, i.e. Nkwichi Lodge, Sail Africa, Sailing Dhow Sanjeeda;
- 4 Marketing/PR Agencies, i.e. Ethos Marketing, Geo Group & Associates, International Travel Destinations, The Safari Agency;
- 1 High Commission, i.e. Mozambique
- 3 Press (Travel Weekly, TTG, Travel Africa Magazine)

Total no. of questionnaires completed: 25

Total no. of interviews conducted: 45

Some of the interviewees had not visited Mozambique personally and therefore were not able to answer all the sections of the questionnaire and/or comment in any detail about the destination.

III.1.1 Mozambique Agents

The great majority of UK Tour Operators do not have a local agent in Mozambique; of the 25 Tour Operators surveyed, only 2 (less than 10%) indicated that they worked with a local agent in Mozambique.

The main reason for this can be explained by the following findings:

- Mozambique, in most cases, is simply offered as a beach extension, i.e. 'high-yield island' tourism, from South Africa, Botswana, Zimbabwe and/or Zambia
- Most UK Tour Operators, book their clients direct with the resorts and/or lodges in Mozambique, and the transfer from and back to the airport is organized by them as well. The most popular resorts included in their brochures are: Benguerra Lodge, Indigo Bay, Marlin Lodge and Quilalea.
- Some UK Tour Operators work with a South African agency (i.e. ground-handler or incoming Tour Operator), of which a few have a local office in Mozambique (e.g. Dana Tours)

Several of the UK Tour Operators surveyed, mentioned that there were no reliable local agents (i.e. ground handlers, tour companies and/or incoming Tour Operators) available in Mozambique, or they could not find any that met their requirements.

III.1.2 Trip Characteristics

The number of passengers carried to Mozambique varied widely from one Tour Operator surveyed to another, from just 1 or a few passengers to as many as 200 per year.

The total number of passengers carried by the UK Tour Operators surveyed is around 750, which is only about one quarter of the total number of British holiday makers that visit Mozambique each year (i.e. 3,000, according to the Mozambique High Commission in London).

The average length of stay of UK visitors to Mozambique, is limited to 4-7 nights, due to the fact that great majority of Tour Operators surveyed offer the destination as a post-safari beach holiday.

In the case that Mozambique is offered as part of an overland safari, in combination with (an)other Southern Africa destination(s), the average length of stay in the destination is generally also less than a week.

The only UK Tour Operators with a longer average length of stay, are those that feature Mozambique as a stand alone destination (e.g. Witney Travel, which offers 7, 10, 12 or 14 night holidays) and a flight operator (Flight bookers, who mainly deals with VFR clients that book 2-4 weeks).

Since most Tour Operators offer Mozambique as an optional extension, bookings are tailor-made and not readily available or published in the brochures or on the websites. The package price for a 7-night stay varies from £600 – £2,700 FAP per person, with an average of around £1,600; which confirms the fact that Mozambique is sold as an exclusive, upmarket destination.

III.1.3 Expected Percentage Growth

More than half of the UK Tour Operators surveyed indicated that they expected growth of bookings to Mozambique to increase by more than 30% in the next 3 years, due to the increasing popularity of the destination.

About one third of the respondents anticipated a smaller increase, mostly less than 10% and only one Tour Operator (Safari Link) has experienced a decrease of bookings to Mozambique.

III.1.4 Other Southern African Destinations Offered

All (but one, i.e. Witney Travel) UK Tour Operators surveyed, offer South Africa as a destination in their programme, to which in some cases Lesotho or Swaziland have been added as an extension, in addition to Mozambique.

The other most featured Southern African destinations in the UK Tour Operators' brochures are respectively: Botswana, Zambia, Tanzania, and Namibia, as well as Malawi. Lake Malawi is an emerging attraction, where Nkwichi Lodge was recently opened at the Manda Wilderness Community Reserve in Mozambique, and Twinspot Travel is the first operator in Niassa Reserve's in the north.

N.B: in spite of its popularity as the second or third most popular destination in Southern Africa, Zimbabwe has been discontinued by most UK Tour Operators, due to the political problems, which may change again in the foreseeable future.

Another major competitor to keep in mind is Kenya, which is still the most popular safari destination from the UK and offers beach holidays as well. Kenya is often offered in combination with Uganda, Tanzania or the Seychelles.

III.1.5 Types of Holidays Interested to Offer

All Tour Operators surveyed offer Mozambique as a Beach Holiday destination or indicated "Beaches" as the type of holiday interested in offering for the destination.

About half of the UK Tour Operators surveyed, indicated Honeymoon packages to be of interest and about the same the Eco-Tourism or Adventure Tourism, mainly wildlife safaris,

even some of them did not consider the actual product on offer was available or suitable to their clients.

Only very few operators indicated Cultural Tourism to be of any interest in Mozambique, and even fewer Health and Wellness, which is mainly for the same reasons as mentioned above for Wildlife or Eco-Tourism.

Due to the fact that the great majority of Tour Operators featuring Mozambique are African specialists that engage in exclusive and often tailor-made trips for individual travelers, there was hardly any interest among the respondents in Incentives, Conferences or other forms of group travel.

Other types of holidays of interest to the UK Tour Operators surveyed, however, includes mostly Wildlife , Diving and Fishing (e.g., seawater fly-fishing and bone fishing).

At most resorts, full board and some activities (fba) are included. However, the 'activities' vary between the lodges. Prices at Marlin Lodge for example, usually include all non-motorised water sports, such as windsurfing and canoeing. While those at Benguerra Lodge include a 'set mixture' per week of two snorkel trips, one 4WB safari across the island, a dhow cruise, a sunset yacht cruise and a day trip to the mainland to the local market at Vilanculos. At both lodges, other activities - including scuba diving, big game fishing and dune boarding - are available at a reasonable extra cost, payable locally

Notes: only one respondent mentioned bird watching and dolphin or whale watching, as a key strength of Mozambique tourism.

Additionally, two suppliers of sailing holidays to Mozambique (i.e. Sail Africa, Sailing Dhow Sanjeeda) were identified and interviewed. Both operators operate a traditional sailing ship, whereby Mozambique is included as part of an Eastern African itinerary; however, the plan to base the Sanjeeda in Mozambique this winter season was recently abandoned by its owner, due the fact that the ship had been chartered for another destination.

III.1.6 Main Competitors to Mozambique

Mozambique is considered to be a unique destination that does not have an equal in Southern Africa or indeed on the African continent as a whole, and some respondents answered 'none' when asked "which destinations do you consider to be the main competitors to Mozambique".

When asked to compare Mozambique with other destinations respondents indicated the following:

- Uncommercialised, simple, unpretentious
- Primarily beach holidays, which is unique in Southern Africa, very good value for money in comparison to Indian Ocean islands .

Note: the comparison made, only relates to Mozambique as presently featured in Tour Operators' brochures, which is highlighted by the following comment received by one of the respondents: 'Difficult to say, because we are just offering Mozambique as a beach extension at the moment'.

When prompted, the majority of respondents considered the Indian Ocean islands to be the main competitor for Mozambique, of which Mauritius was mentioned most times.

Secondly, Eastern Africa was considered to be the main competitor, whereby Lamu (Kenia), Zanzibar, Mafia islands (Tanzania), Nosy Bay (Madagascar) and the Northern Natal coast of South Africa were mentioned as well.

III.1.7 Rating Of Mozambique Product

It should be noted that only about half of the participating Tour Operators' had visited Mozambique themselves, and therefore an even smaller number of respondents was able to rate the different categories mentioned in this section. Furthermore, the answers that required rating were generally quite subjective (clear example is different findings by interviewing two different persons at one Tour Operator) and lacked any benchmarking.

- **Tourist Accommodation:** rating from good to excellent, whereby only one respondent answered good to fair.

- **Service Quality at Hotels:** ditto, whereby the same respondent answered good to fair.

Note: the rating only relates to the lodges and resorts that are included in the Tour Operators' brochures, which –as specifically mentioned by some respondents- are mostly top end accommodations available in Mozambique, that meet the high standards of quality and service required by their clients.

- **Service Quality at other Establishments:** rating varied widely from poor to excellent, which is obviously dependent on the type of establishments visited by the respondents.

Note: the fact that some respondents did not provide an answer at all, highlights the fact only few Tour Operators know the destination beyond the product on offer in their programme.

- **Tours:** rating equally varied from poor to very good, but mostly rated as good by the respondents who provided an answer. As for the previous category, fewer respondents could give an answer, since they personally had not been on a tour [outside of the resort].

- **Cultural attractions:** again, rating varied widely from poor to very good; as for the previous category only a few respondents had the opportunity to get to know any of the cultural attractions during their visit to Mozambique.

- **Safety and Security:** rating from good to very good, mostly good but bearing in mind, again that this is mainly related to visits that are limited to way from the airport to the resorts and vice versa (see also 12).

- **Value for Money:** rating varied widely from fair to very good, but mostly fair; some respondents specified that resorts of similar standard were more expensive than South Africa, but less expensive than Mauritius.

- **Other Attractions:** rated good by only one respondent, who had a more comprehensive view of Mozambique as a tourism destination [as the only Tour Operator that does not offer

the destination as an extension to South Africa].

- **Water Sports:** rating varied from fair to very good, but mostly good; again in relation to activities offered at the upmarket resorts offered in the Tour Operator brochures.

- **Infrastructure:** rated from poor to fair, but mostly poor; some respondents specifically mentioned poor roads.

- **Airline Connections:** rating varied widely from poor to good, depending on whether they referred to air service from South Africa to Vilanculos [as specifically mentioned by some respondents and indeed offered by great majority of operators], internal flights in Mozambique or international flights to Mozambique.

III.1.8 Feedback Received From Clients

All Tour Operators reported positive feedback from their clients and some additional comments received were:

- 'Unique hide-away destination'
- 'Indigo Bay = 5 Star'
- 'They love it'
- 'They like it'
- 'Positive, but no rave reviews'
- 'Positive, but wary about poverty'
- 'Positive, but complaints in the past and slightly getting better [in time]'.

III.1.9 Key Strengths Of Mozambique As Tourism Destination

All Tour Operators mentioned the **Beaches** as the single most important strength of Mozambique as a tourism destination, followed by **Friendliness of its People**, for which Mozambicans are renowned, mentioned by the majority of respondents.

Less than one fifth of respondents mentioned **Value for Money**, which in fact was considered to be more like a weakness by slightly more respondents.

Even less mentioned **Tourism Accommodation** (only 3x), **Culture** (only 2x) **Shopping & Souvenirs** (only 1x), while Festival and Events was not mentioned, or even recognised when prompted, by any Tour Operator!

With regard to Culture, one operator mentioned the potential of the interior when developed for wildlife safaris in 5-10 years. Other key strengths recognised included:

- Unspoilt destination, like Mauritius 50 years ago
- Remoteness, exclusivity, small scaleness, scuba diving and snorkeling, marine life
- Rustic and luxurious hideaway

- **Diving** (4x mentioned separately), pristine reefs, not over-fished
- Fascinating potential, to develop range of product and air access
- Untouched environment, diving, deep sea fishing
- Wildlife potential, diving (whale sharks)
- Trading, positive attitude of government [towards tourism development
- **Fishing**, unspoiltness
- Tropical beauty
- Unspoiltness, diving, bird watching, dolphin and whale watching, deep sea fishing and fly fishing (latter in particular, supposed to be world class!).

III.1.10 Weaknesses Of Mozambique As A Tourism Destination

Almost all respondents mentioned **Air Access** as the main weakness for tourism development in Mozambique, which related to:

- ‘Direct international flights from the UK’
- Competitive airfares [for existing regional flights], ‘overpriced airfares’, ‘flights relatively expensive’,
- ‘Internal [domestic] flights, e.g. ‘Vilanculos-Pemba’, one respondent mentioned that air hostesses were unwelcoming [on flight from Maputo to Pemba].

Note: most Tour Operators’ use Pelican Air, as ‘the only reliable scheduled airline’ into Vilanculos, whose services were introduced in addition from Johannesburg from Kruger Park. Their fares, however, seem to have risen with a surge in demand.

More than half of Tour Operators’ surveyed mentioned **Infrastructure**, and in particular roads on the mainland, as a main weakness for tourism development in Mozambique. Comments varied from ‘Poor road quality when driving off main way to the resorts’, to ‘Roads, especially to Pemba’, ‘Transfers from Durban overland’, ‘Remoteness northern part (lack of access road over Rovuma river)’, and others included:

- Transport is 3x more expensive than anywhere else
- Lack of local ground handlers [incoming Tour Operators/Agents]

One respondent also mentioned the water quality, which is non-potable and source of serious illness.

More than half of the Tour Operators surveyed, also mentioned Lack of Awareness as a main weakness. One respondent mentioned negative political perception and aftermath of flooding.

Nearly half of the respondents mentioned **Range of Products** to be a weakness; comments received included: ‘Relatively expensive’ (3x), ‘Safari/Game resorts lacking’, ‘Hotels too expensive [for what they offer]’, ‘number of dive sites just enough for one week visit’, ‘Lack of Middle Market’ and ‘Not all beach resorts are typical to Mozambique’ [from architectural point of view].

Only a few respondents, however, mentioned **Standard of Accommodation** as a weakness and even less **Quality of Service**, although it must be noted that this is only in relation to the

up market resorts that have been included in Tour Operators’.

Note: Only one respondent mentioned language as a weakness to Mozambique’s tourism development; when prompted, the Tour Operators specified that they generally did not have a problem at the resorts and the level of service was in line with the reduced expectations from their clients.

III.1.11 What Will Help To Sell More Holidays To Mozambique

Answers received varied and must be seen in relation to the actions needed to strengthen Mozambique’s position in the market, which for most part reflect the previous, aforementioned findings, i.e.

- ‘More up market hotels/lodges’
- ‘Facilitate overland visits from DUB by making visa available at entry point’
- ‘Improve infrastructure and ease to book from London’
- ‘Net fares on LAM & TAP, better internal connections’
- ‘Improve road access, more and greater variety of campsites, develop game parks’
- ‘More flights at affordable rates, raising standards’ [of accommodation and service]
- ‘Improve international air access, better ground services, accept credit card payment for visas!’
- ‘Tourist board contact (2x), brochures’
- ‘Better, more reliable and more frequent flights at competitive prices’
- ‘Direct flights to Maputo [from Britain]
- ‘Possibility to issue LAM tickets’
- ‘Air access, greater diversity (more lodges and resort style hotels), safari development, dive products’
- ‘Better and more reliable scheduled flights to other parts of country as well, relax requirement for 2 passport pictures for visa, ease border restrictions, more self drive holidays by offering, better road up the coast’
- ‘Better ground infrastructure, maintain high standards (IE), more flights, better internal connections and from DES with BA to Pemba’
- ‘Alternative airline to Pelican Air, local ground operator, more accessible and more economical tours’
- ‘More choice of accommodation, personalised, well run, guided and safe camps’
- ‘Greater range of hotels, cheaper air access and good connections’
- ‘More flights’
- ‘Better and more sophisticated hotels and resorts’
- ‘Improve accessibility by air; in particular from South Africa. N.B: prices to Vilanculos have doubled in less than a year’

Note: in addition to Air Access, which had already been identified as an important weakness to overcome, and wider Range of Accommodation, Tour Operators are calling for an improvement of visa procedures to be made more efficient and easier to obtain for their clients.

III.1.12 What Actions To Strengthen Mozambique Market Position

The following comments and suggestions were received by the Tour Operators, which mainly reflects the lack of awareness, mentioned as a main weakness under 13:

- 'More marketing, co-operative activities'
- 'Publicity in national press, more exposure (e.g. BBC Holiday Show, Travel Weekly insert, etc.), website'
- 'More information, educational programmes'
- 'Direct consumer market promotions, work with regional organisations (e.g. ATTA, SATOA, etc.), fam. Trips'
- 'Brochure material'
- 'More marketing, educationals'
- 'Publicity, Educationals, workshops, brochure material, etc.'
- 'Embassy/Tourist board contact, website'
- 'Product awareness, training'
- 'Send information on new developments'
- 'Ongoing awareness campaign, workshops, newsletters, festivals, local support for visiting press, training and press support (not to be dependent on Tour Operators only'
- 'Information, promotional material'
- 'Open up north'
- 'Coherent strategy' [of tourism development]
- 'More joint marketing activities, training events for trade'
- 'Working with travel trade partners to spread the word about what is on offer in Mozambique'

The above indicates that most Tour Operators would appreciate trade support to promote the destination in the market place, in particular through training and educational activities.

Note: one respondent, however, mentioned: 'No marketing activities required, but fund fam. Trips' and two respondents even answered that they were happy with the present situation, e.g. 'All fine, no need for additional support', 'Keep as it is, niche destination that doesn't depend on overseas visitors, but is rather booked as an extension of South Africa'.

III.1.13 Other Comments And/Or Suggestions

Other comments and suggestions received included the following, which again, must be seen in relation with the afore mentioned points:

- 'Visas to be made available at border entry points'
- 'Tourism development should be managed carefully to ensure that the impact is no harmful to the environment and should be kept to the higher end of the market place'
- 'Unlock potential northern region, Ibo island in particular. Few hotels available there, which are upmarket and not easy accessible'

And, finally, an interesting comment was made by one Tour Operator to 'Visit Namibia and learn from their success story (copy their marketing plan!)

III.1.14

Summary and Conclusions

The UK holiday market to Mozambique is relatively small, about 3,000 visitors p.a, but expected to grow substantially, more than 30% in the next 3 years [due to its growing popularity and recent positive media coverage]. While only about one quarter appears to be generated by UK Tour Operators; around 30% have been identified to feature Mozambique in their programme, which is less than one tenth of the total number of Tour Operators in UK that programme South Africa.

The great majority of the Tour Operators surveyed are African specialists, whose programme to Mozambique is mostly limited to beach extensions from safaris in neighbouring destinations (mainly South Africa, but also Botswana and to a lesser extent Zambia and Tanzania).

Because of its emphasis on beach holidays in the brochures, Mozambique is more considered to be a competitor to the Indian Ocean islands, from Mauritius in the East to the Tanzanian and Kenyan resorts in the North.

A limited number of up market resorts (of which Benguerra Lodge, Indigo Bay, Marlin Lodge and Quilalea are the most popular) are predominantly booked direct, for an average of 4-7 nights (about 5 nights on average), at package rates of £600-£2,700 (about £1,600 on average).

All operators agree that Mozambique offers a unique product, which is largely untapped and has the potential to rival any other tourism destination in Africa [and beyond!]. In addition to beach holidays, there is a growing honeymoon market and great interest in wildlife safaris (eco-tourism), diving, as well as bird watching, fishing and sailing.

The present tourism products on offer in Mozambique are rated positively, both by the clients and the Tour Operators themselves, whereby it should be noted that the majority of the respondents seem to have a certain ignorance and/or lack of recognition of the local culture, historical treasures and other attractions that are available beyond the beach.

The perceived “Value for Money” is fair, but Tour Operators would like to unlock the potential around the country and be able to offer more diversified tourism accommodation (affordable resorts and lodges), product (eco-tourism and adventure based activities, wildlife safari parks in particular), tours (cultural products and services), and other activities (e.g. marine resource based activities), as well as the necessary professional support from local authorities and incoming tour operators/ground handlers.

However, this is unlikely to be achieved, unless a solution is found to alleviate the two main bottlenecks [as identified by the great majority of Tour Operators], i.e.

1. Air access > direct flights, good connections, more competitive net rates, ticketing facilities for internal flights
2. Infrastructure > improved road network, road conditions and safety.

Other factors required [according to the majority of respondents] to develop sustainable tourism further are: more safety and security, more flexible visa requirements, less

bureaucracy and corruption and, last but not least, more promotion and trade co-operation in the market place to increase awareness for Mozambique as a tourism destination.

III.2 Portuguese Tour Operators Surveyed

Portugal is a relatively small outbound travel market. Although, as confirmed by APAVT (i.e. the Association of Portuguese Travel Agents), Portuguese Travel Agents do not require a separate license to operate as a Tour Operator, most agencies operate as 'minorista', i.e. Travel Agent only.

The bonafide Portuguese Tour Operators that feature Mozambique in their programme, were identified through the following sources of information:

- Embassy of Mozambique in Lisbon (*)
- Embassy of South Africa in Lisbon
- TAP (Air Portugal)
- BTL (Lisbon Travel Market)
- Instituto Camoes (Paginas Lusofonia)
- Turisver (Travel magazine)
- Publituris (Travel Trade & Hotel Guide)
- Rotas & Destinos (Ditto)
- Sapo (on-line directory)
- AIEIOU (Portuguese search engine)
- Cosmos (Portuguese search engine)]
- O Leme (Portuguese search engine)

* Note: in spite of verbal co-operation offered, no list of agents has been received to date.

A total number of 36 companies were contacted in Portugal, of which 12 have been identified as Tour Operators, 10 replied that they do not offer Mozambique, 8 were Travel Agents, 4 did not reply and 2 could not be contacted by phone.

As a result, 19 questionnaires were completed, including 12 Tour Operators and 7 Travel Agents. Only very few respondents had visited Mozambique personally and therefore were not always able to answer all questions of the questionnaire.

III.2.1 Mozambique Agents

About half of the respondents had an agent in Mozambique; however, only a few local companies seem to be handling with overseas clients, i.e. Dana Tours, Mozambique Advisor, Mextur and SET (some of which are foreign owned).

Some operators [as most commonly in the UK], indicated that they worked directly with the resort, who also handle their transfers. Air Portugal Tours, the Tour Operator of the national airline, TAP, mentioned to use a local agent for Tours, Transfers and Services, but book direct with the hotels and another operator mentioned to contact the hotels direct.

One respondent mentioned that they are looking for another local agent, since they are not entirely happy with the present service; another respondent – that does not programme the

destination- claimed that there are no reliable agents available in Mozambique [as mentioned by a number of British Tour Operators].

III.2.2 Trip Characteristics

While not all respondents provided statistics, the number of passengers carried to Mozambique varied widely from one Tour Operator surveyed to another; from 10 to nearly 300 per year.

Unfortunately, no response could be obtained from the Mozambique Embassy in Lisbon about the total number of Portuguese visitors per year. However, [even more than for the UK], according to TAP, the number of [holiday] bookings through Tour Operators to Mozambique, is only a fraction of the total number of visitors, mainly traveling on business or visiting friends and relatives.

Most respondents indicated an average length of stay of 7 days; however, some mentioned 7-10 or even up to 15 days [presumably including overnights' travel]. While [in contrast to the UK] some Tour Operators offer Mozambique as a stand-alone destination, they also offer Mozambique as a post-safari beach holiday. One operator specifically mentioned to have much demand for Mozambique as an extension to Kruger Park.

The average package price, for those respondents that provided this information, seem to be around €1,000 – €1,500 for 7 nights. However, some more up market operators indicated an average package price of more than € 200 per day [which is more in line with the package price sold from the UK], as the price largely depends on the category of resorts included in the package, which is created by the Tour Operators according to the clients' available budget.

III.2.3 Expected Percentage Growth

The great majority of respondents indicated the expected growth of bookings to Mozambique to increase only marginally from 0% to 10%. Only a few foresee an increase of 11%-20% and one of more than 30%.

One respondent mentioned 'It's a growing destination. Prices are reduced and TO's are getting more capacity through negotiated prices'.

III.2.4 Other Southern African Destinations Offered

The most popular destination on offer is Tanzania , followed by Kenia and South Africa. To a much lesser extent, operators feature respectively Namibia, Botswana and Zimbabwe, followed by just a few operators that also include Swaziland and Malawi.

III.2.5 Types Of Holidays Interested To Offer

All Tour Operators surveyed offer Mozambique as a Beach Holiday destination or indicated “Beaches” as the type of holiday most interested in offering for the destination.

About half of the respondents [similar to the UK], indicated Honeymoon packages to be of interest. Only a few agents mentioned Eco-Tourism (including Safari) and an equal number Incentive Travel, including one mention for Conferences as well.

III.2.6 Main Competitors To Mozambique

The majority of respondents mentioned Tanzania as a main competitor to Mozambique. Several operators mentioned the popularity of Tanzania due to similar product to be available at more competitive rates.

Note: contact of one operator, Lusanova (a specialist that recently acquired Across Africa) is listed in Travel Trade Directory as tourist board for Tanzania, apparently actively promoting this main competitive destination.

Interestingly [in contrast to the UK market], about half of the respondents mentioned South Africa as a main competitor to Mozambique, followed by Kenya and Botswana. Although one operator mentioned: ‘Mozambique is a destination for leisure not adventure. The Mozambique customer is very different from the one that goes to South Africa’

In spite of the fact that some operators also feature Mauritius and Seychelles, the Indian Ocean Islands were not mentioned by any of the respondents.

Furthermore, the following comments and suggestions were received:

- ‘To the Portuguese tourist the language is the main factor of attraction’
- ‘Mozambique offers other kinds of attractions, e.g. language and common past’
- ‘The language and the fact of being a former colony are the main factors of attraction for the Portuguese tourist’
- ‘The fact that the language is the same helps to sell’
- ‘It’s now fashionable to go to Mozambique on Honeymoon. It's difficult to compare, all African countries are different’
- ‘Mozambique can't offer safaris but can offer excellent beaches in conjunction with Kruger park’
- ‘More expensive than other destinations. Offer still relatively poor’
- ‘Potential, due to nature and historic links, but development hindered because of limited air space and seats on offer. Final (high) price is also demotivating’.
- ‘Mozambique potential still unexploited’
- ‘To the Portuguese, Mozambique is a unique destination, since it combines Portuguese and African culture’
- ‘The main motivation for the Portuguese to choose Mozambique is the common past. The only country I would compare with is Angola, but due to the war and violence in Angola we can't offer it as a leisure destination’
- ‘Still too expensive but benefits from same language’

- ‘Mozambique cannot be considered a competitor to other African destinations in what concerns professionalism and quality of services of its local operators’.

III.2.7 Rating Of Mozambique Per Category

In spite of the fact that only very few respondents had visited Mozambique themselves, they provided ratings for most of the categories included in our survey, which resulted in a wide variety in rather subjective rating, also due to lack of benchmarking.

- **Tourist Accommodation:** rating from good to excellent, mostly good.

- **Service Quality at Hotels:** rating from good to excellent, mostly good, whereby one respondent indicated fair.

Note: the rating only relates to the lodges and resorts that are included in the Tour Operators’ brochures, which have been pre-selected and limited to those that meet the high standards of quality and service required by their clients.

- **Service Quality at other Establishments:** rating varied from fair to good, relating to about 40% - 60% of the respondents.

- **Tours:** rating varied widely from poor to very good, but mostly rated as good by the respondents who provided an answer. As for the previous category, fewer respondents could give a qualified reply, since many had either not visited the destination and/or toured outside of the resorts.

- **Cultural attractions:** rating varied widely from poor to good; as for the previous category, only a few respondents had the opportunity to get to know any of the cultural attractions during their visit to Mozambique.

- **Safety and Security:** rating from poor to good, mostly fair, which would depend largely on the respondents’ subjective perception of the destination.

- **Value for Money:** rating varied from fair to good, about 50-50%. One respondent specifically mentioned that Tanzania offers many more reasonably priced hotels and asked why not more were available in Mozambique.

- **Other Attractions:** rating varied from poor to good, which would again largely depend on personal experiences and perception of attractions visited.

- **Water Sports:** rating varied from fair to excellent, but mostly good.

- **Infrastructure:** rating varied widely from poor to good, mostly fair; some respondents specifically mentioned poor roads.

- **Airline Connections:** rating varied widely from poor to very good, but mostly poor.

III.2.8 Feedback Received From Clients

In spite of the afore-mentioned less than positive rating, all respondents reported the feedback received from their clients to be good to mostly very good.

Some additional comments received here included:

- Very good, they always return with a positive image
- Never any complaints (4x)
- Quality and conditions have improved
- Majority content
- Good, but client is told what to expect before departure
- Good, clients tend not to consider the poverty and limitations of destinations, due to friendliness of its people
- Some lack of professionalism on all levels

III.2.9 Key Strengths Of Mozambique As A Tourism Destination

All Tour Operators mentioned the **Beaches** as the single most important strength of Mozambique as a tourism destination, followed by Friendliness of its People, which was mentioned by the majority of respondents.

About half of the respondents mentioned **Tourism Accommodation** and even less **Shopping & Souvenirs**, followed by **Value for Money** and **Safety and Security** for just a few respondents. None of the respondents mentioned Culture or Festival and Events.

One operator mentioned that they were planning to open a hunting resort next year. Other key strengths mentioned here included:

- 'Food and sea food in particular'
- 'The fascination of Africa'
- 'Beach and Safari combination'
- 'Nostalgia, former colony (2x)'
- 'Safari'

III.2.10 Weaknesses Of Mozambique As A Tourism Destination

The majority of respondents mentioned **Air Access** and **Infrastructure** to be the main weaknesses hampering tourism development in Mozambique. Comments received here included:

- 'Domestic flights'
- 'Domestic flights are not enough, e.g. between South and North, only 3 times per week, 40 seaters, compared to Nairobi – Mombassa, offering daily flights with Jet service'
- 'Seats for flights have to be guaranteed by resorts'

Other negative comments received in this section were as follows:

- 'Country still recovering from war'
- 'Violence, robberies are always with guns. Roads are dangerous after 5pm'
- 'Country's poverty'
- 'Politic power and personal interests'
- 'Prices'
- 'Lack of cultural activities, lack of a nature park to compete with Kruger'

III.2.11 What Will Help To Sell More Holidays To Mozambique

Answers received varied, but were primarily directed to prices for airfares and hotels.

- 'Reduce flight and hotel prices' (2x)
- 'Better and cheaper air access to MZ. Another thing might be the proper preparation of Pemba airport for bigger aircrafts'
- 'Flights are too expensive; Safety is an issue to which authorities should pay more attention'
- 'More promotion, more support from Embassy to Tour Operators'
- 'Improve airline rates; increase number of seats available. Diversify offer, not limited to beach. Missing component nature/park.'
- 'Prices could be more attractive'
- 'Better prices'
- 'Increase quality and infrastructure (2x) / more hotels / a professional standard of services'
- 'Promotion/more diversity/ new tours as offer is very reduced'
- 'Cheaper flights/Promotion/ stronger investment in tourism'
- 'More promotion' (4x).
- 'Reduce flights and hotels prices, increase hotel capacity'
- 'Reduce flights and hotels prices (2x), increase promotion'

III.2.12 What Actions To Strengthen Mozambique Market Position

The following comments and suggestions were received by the Tour Operators:

- 'Organise workshops to promote MZ. Lower visa fees and reduce bureaucracy'
- 'To take tourism seriously'
- 'Promote workshops to advertise what tourists can find in Mozambique. Hotels could be a partner for these kind of initiatives; also involve Tour Operators and other services in these kind of activities'
- 'More promotion and adverts of destinations; more activities; more events'
- 'Promotion of Mozambique in a large scale and promote partnership with Tour Operators'
- 'Promotion of Mozambique in a large scale and promote partnership with Tour Operators'
- 'Increase offer LAM versus TAP, make effort to increase airline offer (seats – see also 14). Reduce or cancel visitors entry (visa)'
- 'More promotion through the media. Promotion is made by Hotels at present'
- 'Promote more and better'
- 'Create the necessary infrastructures/more international promotion'
- 'Fight corruption and personal interests'
- 'Improve services out of hotel resorts to give more independence to tourists'
- 'More promotion (5x) and workshops for Tour Operators and invitations to visit the country'
- 'More promotion and workshops for TO, Increase investment'

The above confirm that most Tour Operators would like to see more promotion of the destination and receive trade support.

The other issues of concern regard improvement of infrastructure (as mentioned under 14), bureaucracy and corruption, as well as visa requirements.

III.2.13 Other Comments And/Or Suggestions

Other comments and suggestions received included the following, which again, must be seen in relation with the afore mentioned points:

- 'Accommodation in Mozambique is very good and resorts always try to give the best service, they are also investing on training their staff'
- 'It's a beautiful country'
- 'Would like to visit'
- 'Mozambique is a destination with a lot to offer but its potential is still unexploited. At the same time it is important that it doesn't become a destination for the masses'
- 'Flights to Mozambique have an unacceptable waiting list and his always difficult to find seats on dates requested. Flights via South Africa are too long. Negotiate for charters'
- 'More support from Embassy in Portugal for visas / still too expensive'

- 'Must avoid mass tourism. Increase safety in national parks. Preserve wildlife for safaris'

III.2.14 Summary And Conclusions

The Portuguese holiday market to Mozambique, considered to be a natural source market due to its common language and history, is dominated by a handful of Tour Operator specialists (Across Africa/Lusanova, James Rawes, Sol Tropico, Terra Africa/Terra Brasil), two major generalists (Club 1840, Mundo VIP and in-house operator of TAP (Air Portugal Tours). Basically, those that have access to the limited number of seats available on the Lisbon-Maputo route operated by TAP [the national airline of Portugal].

A slightly larger number of smaller Tour Operators also offer Mozambique as an extension to safari holidays (mainly from Tanzania or South Africa). The majority of Portuguese visitors to Mozambique [of which the total number has to be determined yet], stay on average 7 nights, for a package price of around € 1,500 per person.

Although there is an apparent trend of Mozambique as an emerging Honeymoon destination, no significant market growth is expected, mainly due to the limited number of seats available, the relatively high price level of both the airfare and beach resorts. In spite of the enormous potential for development, the Tour Operators' request for a more diversified offer of accommodation, product (wildlife safaris in particular) and activities, is unlikely to be met short term, because of limited demand, limited infrastructure and limited professional support offered by local agencies [i.e. incoming tour operators/ground handlers].

Other factors required [as mentioned by the Tour Operator respondents] to develop tourism are, more safety and security, more flexible visa requirements, less bureaucracy and corruption and more promotion and trade co-operation.

III.3 German Tour Opertors Surveyed

Only six tour operators (DERTOUR, Gebeco, Ikarus, Meiers Weltreisen, TUI, Studiosus) are currently offering Mozambique and have only in November 2004 (except Ikarus) taken this destination up in their catalogues. Therefore they do not have a lot of background information and experience.

Eleven tour operators were supplied with the questionnaire but only five were returned completed (Gebeco, Tui, Ikarus, Meiers Weltreisen, DERTOUR), three do not offer such an exotic destination only mass tourism (alltours, ITS= LTU, FTI) and three were not prepared to fill it out (studiosus, Thomas Cook, Öger-Gruppe).

III.3.1 Mozambique Agents

None of the four tour operators who offer Mozambique has a specific agent in the country.

III.3.2 Trip Characteristics

Only Ikarus Tours has been offering this destination as an expedition since 1998 and as an extension of a South Africa round trip. All other tour operators have only launched this destination in their November 2004 catalogues.

Ikarus had 15 – 20 travelers each year since 1998. The average stay was 7 – 10 days as it was combined with South Africa and Zimbabwe. At present the whole 17-day-expedition (including South Africa, Zimbabwe, flights, board, entrance fees and insurances) cost 1,790 Euros. The price in 1999 was considerably less and increased within the years.

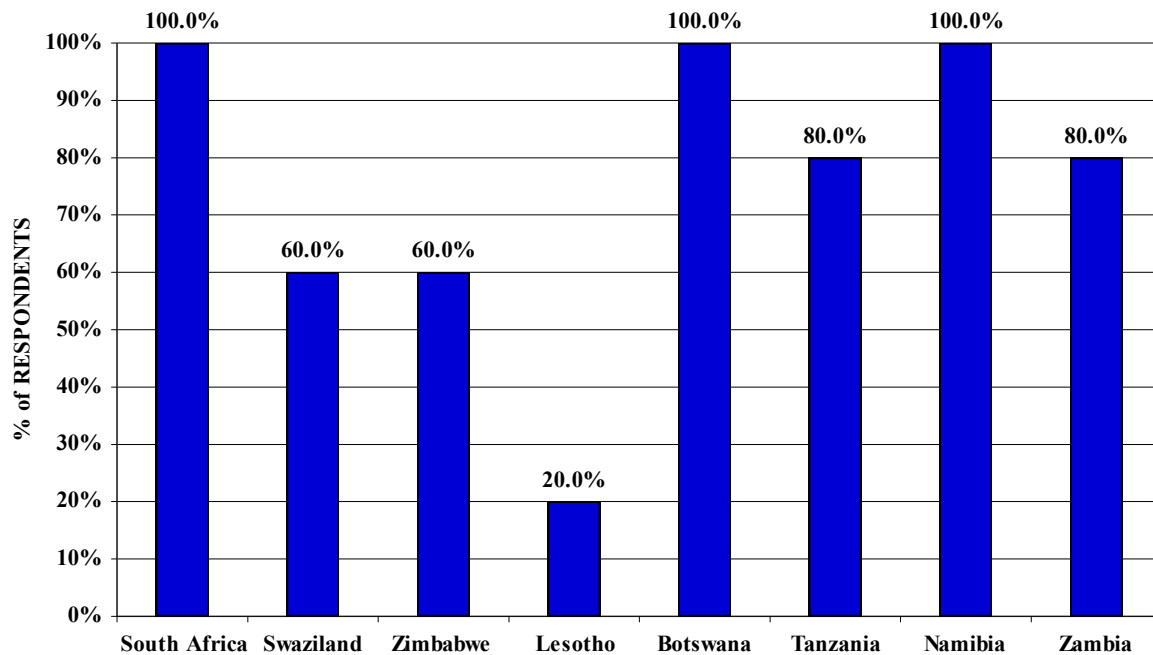
III.3.3 Expected Percentage Growth

100 % of all respondents indicated that they expected a growth rate of 0 – 10 % as it is for most of them a new destination.

III.3.4 Other Southern African Destinations Offered

South Africa, Botswana, Namibia, Tanzania, Zambia, Swaziland and Zimbabwe were some of the other Southern African destinations offered by tour operators (see Figure III.1)

Figure III.1 Southern African Destinations Offered



Source: German Tour Operator Survey, 2004

III.3.5 Types of Holidays Interested to Offer

Eighty percent of the respondents indicated that the beaches were a major interest. One offered an expedition (Ikarus) and another one an adventure holiday (Dertour). Meiers Weltreisen was interested in health and wellness and honeymoon packages.

III.3.6 Main Competitors to Mozambique

Eighty percent of the respondents thought that Mozambique has no main competitors as it is different to the other Southern African countries (like South Africa has not got the fine beaches but has the National Parks to offer). One respondent considered Tanzania to be the main competitor.

The following criteria were mentioned when asked to compare Mozambique with other destinations:

- lack of necessary infrastructure - that is why some only offer it as an extension and a beach holiday
- unique beaches and good water quality
- less known, less requested, secret tip

III.3.7 Rating of Mozambique Product

Watersports was the only item rated excellent by the tour operators. The other products were rated between good and poor. Tourist Accommodation, value of money, infrastructure and airline connections were all rated as fair. Service quality at hotels and other establishments as well as other attractions were rated good to fair. Tours and cultural attractions were rated fair to poor, while safety was rated good to poor.

	Excellent	Very Good	Good	Fair	Poor
Tourist Accommodation				X	
Service quality at hotels			X	X	
Service quality at other establishments			X	X	
Tours				X	X
Cultural Attractions				X	X
Safety			X		X
Value for money				X	
Other Attractions			X	X	
Watersports	X				
Infrastructure				X	
Airline connections				X	

Please note that not all respondents answered these questions.

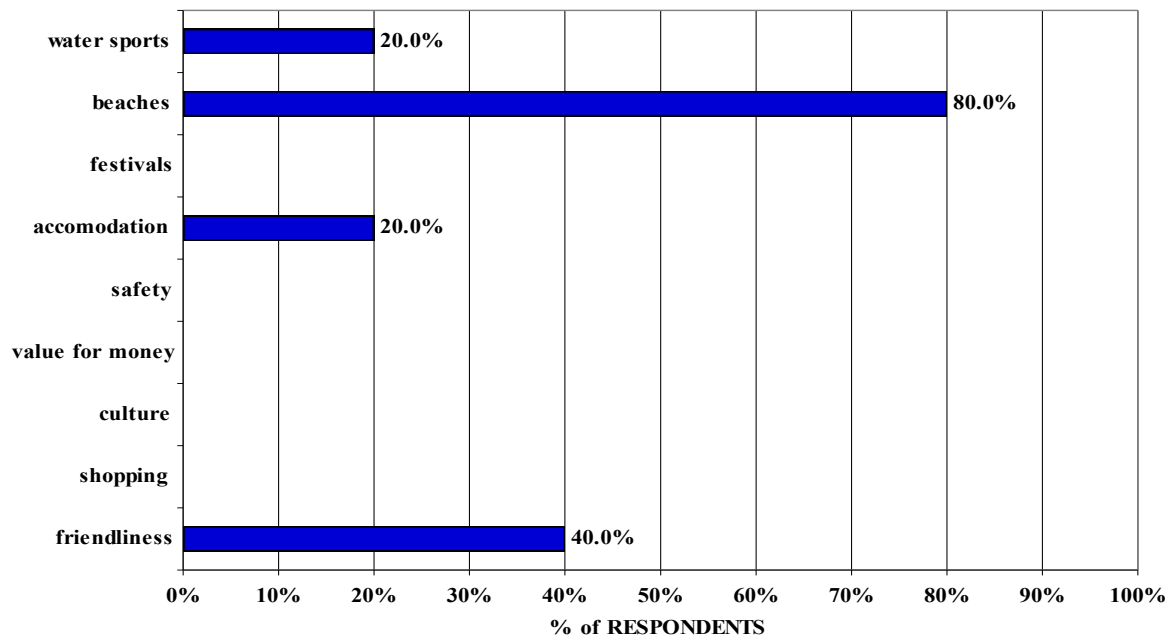
III.3.8 Feedback received from Clients

As only Ikarus Tours has been offering Mozambique for a couple of years they were the only ones who could answer this question. All their guests were satisfied with the trip.

III.3.9 Key Strengths of Mozambique as Tourism Destination

Beaches in Mozambique is the number one strength with 80% of the respondents indicating as such. The friendliness of the people is a distant second with 40% of the respondents indicating such. None of the respondents recognized festivals, safety, value for money, culture and shopping as strengths.

Figure III.2 Key Strengths of Mozambique

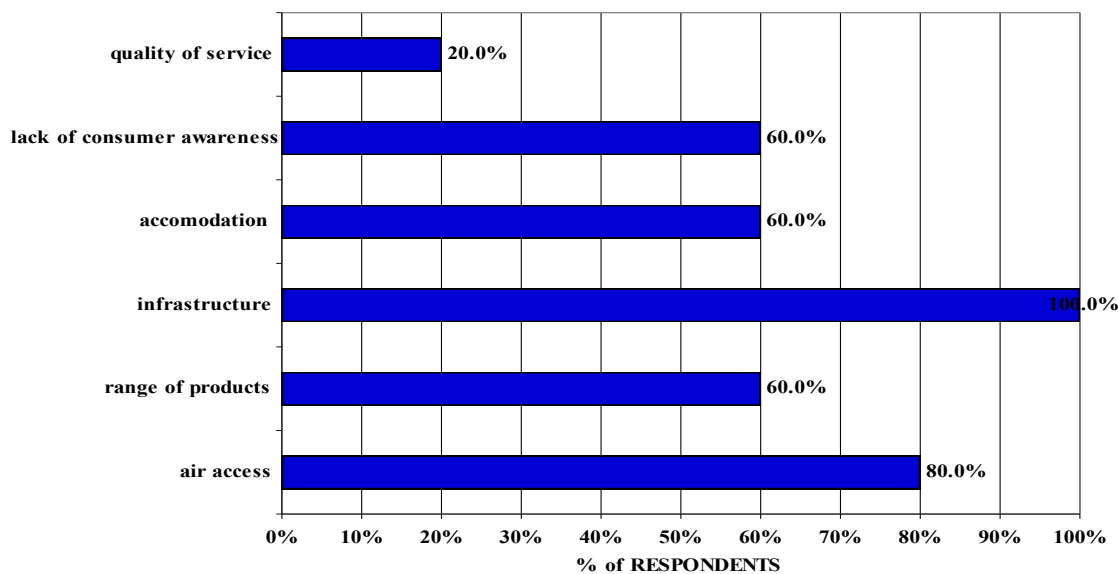


Source: German Tour Operator Survey, 2004

III.3.10 Weaknesses of Mozambique as Tourism Destination

Infrastructure (or lack of) was regarded as the major weakness in Mozambique as all of the respondents indicated as such. Air access was also highly rated as a major weaknesses, with 80% of the respondents indicating as such. Lack of consumer awareness, Accommodation and range of products were also indicated as weaknesses in the Mozambique tourism product with 60% of the respondents highlighting these factors.

Figure III.3 Weaknesses of Mozambique



Source: German Tour Operator Survey, 2004

III.3.11 What will help to sell more Holidays to Mozambique

The answers were:

- create a better infrastructure (hotels, roads, service)
- more advertising/ aggressive marketing to create a better image and increase demand
- increase the service (no comparison to other Southern African countries which are supposed to be perfect)
- develop national parks like South Africa
- develop cultural regions

III.3.12 What actions to strengthen Mozambique market position

The following measures were mentioned:

- cooperation with SATOUR
- representative and more informatory brochures in Germany
- training for travel agencies and tour operators
- offer informatory travels

III.4 Southern African Tour Operators Surveyed

Over 70 questionnaires were sent out to tour operators in Botswana, South Africa, Swaziland and Zimbabwe, of which twelve (12) were received completed – 5 from Botswana and 7 from South Africa.

The tour operators providing valuable input were:

- Pulse Africa – South Africa
- Okavango Tours and Safaris – Botswana
- Safarisplans – South Africa
- Karibu Safari – South Africa
- Bush Ways Lodges – Botswana
- Thompsons Tours – South Africa

None of the tour operators has specific agents in Mozambique.

III.4.1 Trip Characteristics

Only two tour operators provided statistics on passengers carried and average length of stay.

The responses of the two varied markedly as one is a relatively small operator and the other, a relatively large operator.

With respect to the small tour operator, in 1999, 26 passengers were carried and this grew to 40 in 2000 and 55 in 2001. By 2002, the number of passengers increased to 99, but fell to 68 in 2003. The average length of stay experienced, between 1999 and 2003, has been consistent at 5 – 7 nights.

With respect to the large tour operator, in 2003, 1,856 passengers were carried and this grew to 3,015 in 2004. The average length of stay varies between 3 nights, for those visitors to Maputo and 5 nights, for those visitors to the islands. The average package price for visitors to Maputo was between ZAR3,000 and ZAR3,500 per person and for visitors to the islands, the average package price was between ZAR6,500 and ZAR7,000 per person.

III.4.2 Expected Percentage Growth

There were only six (6) responses to this question and 50% of those who responded, indicated that they expected growth in excess of 30%. Two (2) respondents indicated expected growth of 11% to 20%. Only one respondent indicated expected growth of 0% to 10%.

III.4.3 Other Southern African Destinations Offered

The majority of respondents indicated that they offered all Southern African destinations except Swaziland, Lesotho and Tanzania.

East Africa, in particular, Kenya was mentioned as being on offer, as well as the Indian Ocean islands.

III.4.4 Types of Holiday Interested in Offering

All of the respondents highlighted beaches and eco-tourism as types of holiday they were interested in offering.

All but one respondent indicated culture tourism and honeymoon packages as types of holiday they were interested in offering.

Only three respondents were interested in offering incentive travel and conferences and only two were interested in offering health and wellness.

III.4.5 Main Competitors to Mozambique

Interestingly, there was neither consensus nor unanimity among the tour operators who responded on which destinations they considered to be Mozambique's main competitors.

One tour operator identified Mauritius, Madagascar, Seychelles, Kenya and Zanzibar as competitors, while another identified Tanzania and South Africa as competitors.

A third tour operator identified Tanzania and Kenya as competitors to Mozambique, while a fourth tour operator identified Botswana and Zanzibar as competitors.

One of the largest tour operators identified Tanzania, Mauritius, Seychelles, Kenya, Maldives and Thailand as competitors to Mozambique.

Furthermore, the following comments and suggestions were received:

- Generally positive, but feel that Mozambique must not become as developed as Mauritius, but they can tone down their prices as compared to Zanzibar.
- Very positive, feel that no other destination offers better lodges, a great beach destination.
- Feel that it is very poor and lacking infrastructure. Beaches are nice though. Believe that the introduction of wildlife will be a draw card.

- Fell that Mozambique is fairly unknown, more exotic, is an excellent add on to Botswana, but is being land locked.
- Mozambique has some of the best beaches in the Indian Ocean, however they are very expensive in comparison to Mombasa, Mauritius and Zanzibar. Agreeably Mozambique is more “exclusive” and less commercialised than any of the above, and in this sense a little more comparable to Seychelles. Mozambique lacks focused attention to the Honeymoon/Wedding market, which these other destinations are all very focused on. Accessibility is a negative factor facing Mozambique in comparison to the destinations specified as above.

Table III.1 Rating of Mozambique per Category

	Excellent	Very Good	Good	Fair	Poor
Tourist Accommodation		80%		20%	
Service quality at hotels		60%	40%		
Service quality at other establishments		20%	30%	30%	
Tours			80%	20%	
Cultural Attractions		20%	40%	20%	20%
Safety		20%	40%	20%	20%
Value for money		20%	40%	40%	
Water Sports	40%	40%		20%	
Infrastructure			20%	60%	20%
Airline connections			40%	60%	
Other Attractions		20%	20%	40%	20%

- **Tourist Accommodation:** 80% of respondents rated tourist accommodation as Very Good, with 20% rating it as Fair. The overall average rating was mainly Very Good.
- **Service Quality at Hotels:** 60% of respondents rated service quality at hotels as Very Good, with 40% rating it as Good. The overall average rating was mainly Very Good.
- **Service Quality at other Establishments:** 30% of respondents each rated service quality at other establishments as Good and Fair, with 20% rating it as Very Good. The overall average rating was Good.
- **Tours:** 80% of respondents rated tours as Good, with 20% rating it as Fair. The overall average rating was Good.
- **Cultural Attractions:** 40% of respondents rated cultural attractions as Good, with 20% each rating it as Very Good, Fair and Poor. The overall average rating was mainly Good.
- **Safety:** 40% of respondents rated safety as Good, with 20% each rating it as Very Good, Fair and Poor. The overall average rating was mainly Good.

- **Value for Money:** 40% of respondents each rated value for money as Good and Fair, with 20% rating it as Very Good. The overall average rating was Good.
- **Water Sports:** 40% of respondents each rated water sports as Excellent and Very Good, with 20% rating it as Fair. The overall average rating was Very Good.
- **Infrastructure:** 60% of respondents rated infrastructure as Fair, with 20% each rating it as Good and Poor. The overall average rating was Fair.
- **Airline Connections:** 60% of respondents rated airline connections as Fair, with 40% rating it as Good. The overall average rating was mainly Fair.
- **Other Attractions:** 40% of respondents rated other attractions as Fair, with 20% each rating it as Very Good, Good and Poor. The overall average rating was mainly Fair.

III.4.6 Feedback Received from Clients

Responses from the tour operators include:

- Well run and organised.
- Beautiful, relaxed, a more foreign experience.
- All love the beaches, but unfortunately there is not much else to do. Not enough mixing with locals or cultural aspects of tour.
- All positive feedback.
- Responses are varied, though generally very good. We get occasional complaints as we do find that clients expect a more international standard. Lodges/hotels tend to grade themselves on a higher than deserved rating, and often relay this direct to our clients via their own websites. Our negative feedback includes: airline and airport service, standard of food and communication and information given.

III.4.7 Key Strengths of Mozambique as a Tourism Destination

All of the tour operators indicated that beaches is a key strength and all but one indicated that tourism accommodation is a key strength.

Other strengths mentioned, but by relatively fewer tour operators, are:

- Culture.
- Value for money.
- Friendliness of people.

- Unspoilt and not commercialised.

III.4.8 Weaknesses of Mozambique as a Tourism Destination

All of the tour operators indicated that air access and infrastructure are major weaknesses of Mozambique tourism.

Other weaknesses mentioned are:

- Lack of Consumer Awareness.
- Quality Service.
- Found it often difficult to contact people in Mozambique.
- Range of Products.
- Standard of Accommodation.

III.4.9 What will help to sell more holidays to Mozambique

The following are the general comments shared amongst all respondents:

- Airlines need more effective management i.e. LAM and Pelican airlines.
- Lodges need to be more user friendly and more efficiently marketed.
- More safety measure to avoid petty theft at lodges.
- Locals need to brush up on English to improve poor communication.
- Wider range of prices to accommodate all budget groups.
- To stringent restrictions on camping.
- Better access from Botswana needed.
- More reasonably prices airfare options and more affordable beach resorts that provide international standard quality.
- Support from Tourist Board – training, information, destination advertising.

III.4.8 What actions to Strengthen Mozambique Market Position

The following are the general comments shared amongst all respondents:

- More active marketing, better awareness of product on international market.
- Better communication mediums.
- More presence at major travel shows.
- Upgrading of roads.
- Improve and make border crossing more friendly.
- The creation of an active and interested Tourist Board to support operators, agents and the public, including distribution of generic destination information, brochures, maps, factual information etc.
- Would also like to see Mozambique take an interest in the way in which hotels and other tourism operations work as there is little understanding of the industry and

procedures/protocol which should ideally be followed i.e. commission structures, marketing/specials/promotions, distribution of information, updates.

- Mozambique is a growing country and is going to boom in the next 2 years, the correct marketing has to be put into action, good infrastructure, less crime, less drugs and more culture, don't lose your culture, trying to be American or South African does not suit Mozambique.

III.5 Mozambique Destination Survey

The objective of the survey is to assess the current status of the tourism industry and image from Mozambique's perspective. Therefore in choosing the respondents it was necessary to ensure that there was a wide representative sample of the key players who have direct bearing on the tourism industry in Mozambique. It must be mentioned however that travel agents per se were excluded because they are only involved in ticketing mostly for outbound whereas we were looking at sources which generate inbound tourism.

The respondents for this particular survey represented the major tourism stakeholders within Mozambique.

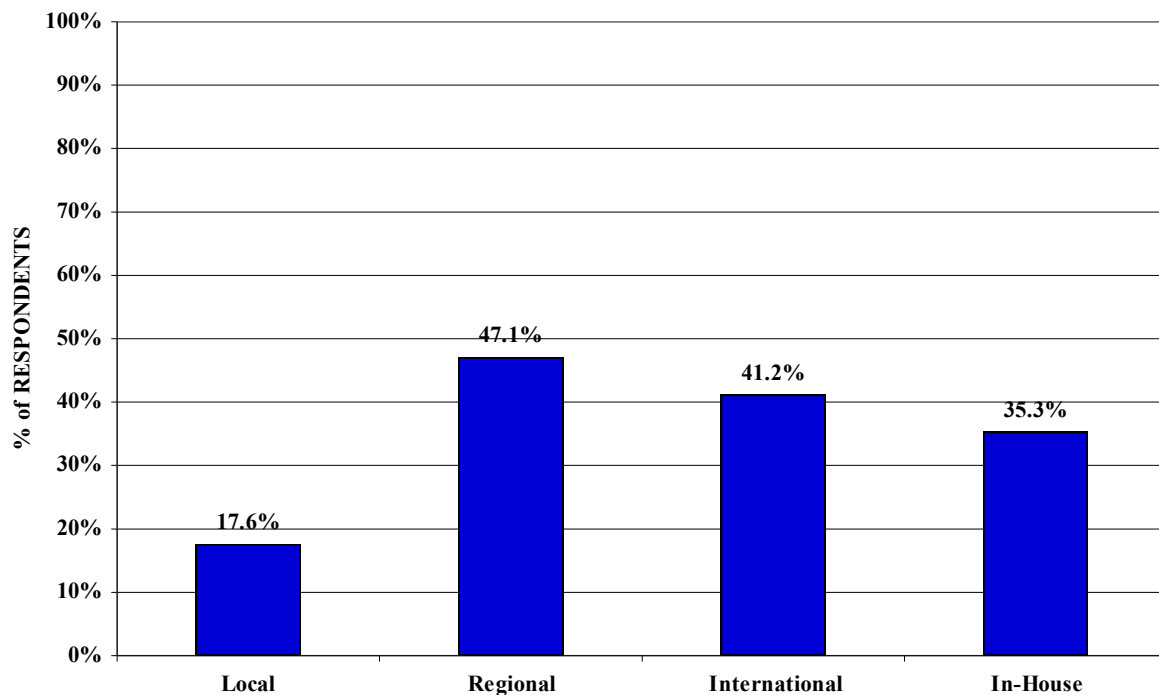
There were 42 respondents.

III.5.1 Tour Operators Brochures Featured

Only 18% of respondents feature in the local brochures with 47% featured in the regional publications, 41% were featured in international publications. 35% respondents were featured in their in-house publications.

Nearly 30% of the ones who feature in their own in house publications operate outside Mozambique either as multinationals or have regional offices in neighbouring countries. The regional and international publications are those found in South Africa and Portugal, except for multinational companies like car hire firms which tend to be more transnational.

Figure III.4 Companies featured Tour Operator Brochures



Source: Mozambique Destination Survey, 2004

III.5.2 Main Markets for Visitors

South Africa is mentioned as the main market by 38% of the respondents whereas Portugal had 10% of the respondents citing it as their main market. It is interesting to note that 6 of the 7 tour operators do not cite South Africa as their main market but rather mention Portugal, Spain and U.K. This can be explained by the fact that the South African market is basically a self-drive market and therefore dispense of the services of tour operators. Spain got big mention with one tour operator indicating that they get 35% of their business from that country.

Other countries which were mentioned as main markets were Italy and France. One tour operator mentioned UK as their main market because of the business they generated after they had attended the World Travel Market. (See Appendix for detailed response)

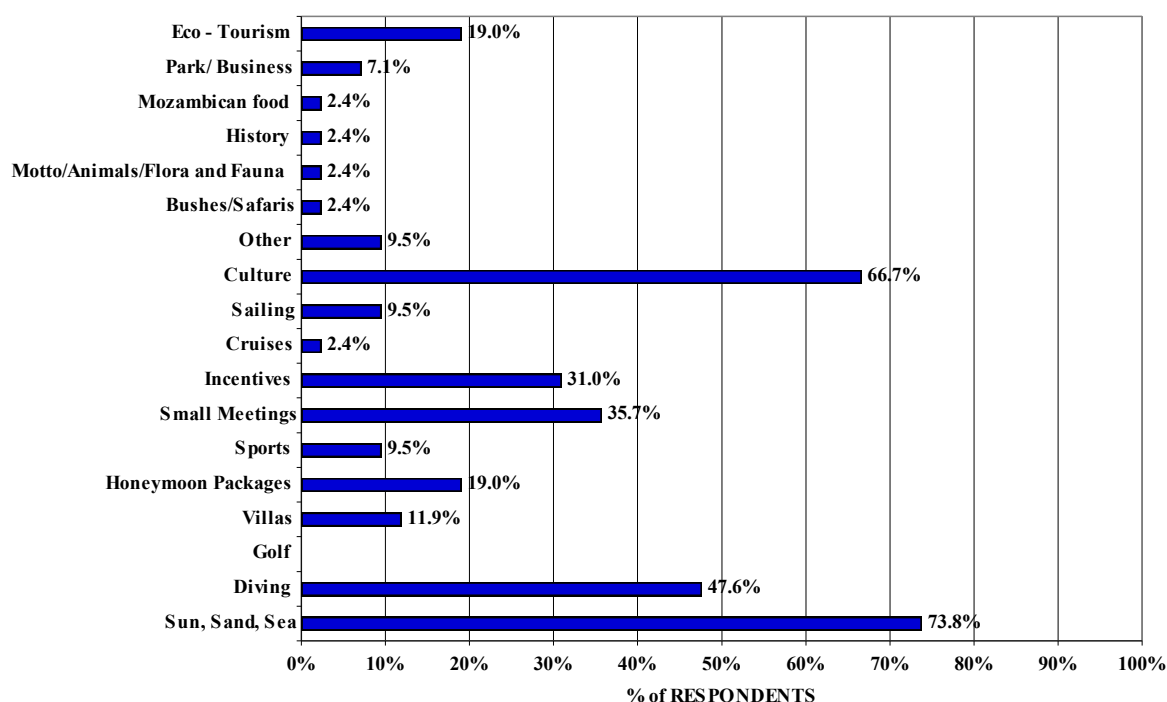
III.5.3 Sources of Growth

There is a strong correlation between main markets for visitors and the potential sources of growth. South Africa represents the biggest source as indicated by 57% of respondents. The expected average percentage growth is 20% per annum. Portugal is also shown as another source of growth as 55% of the respondents indicated. Portugal, according to the respondents, is expected to average 19% growth p.a. All the other source markets had responses from less than 50% of the respondents

III.5.4 Major Interests

Nearly 75% of respondents indicated that sun sand and sea was a major interest followed by culture which had 67% of respondents indicating that it was considered a product of major interest. It was particularly emphasized that because of its different colonial heritage, Mozambique offered a unique kind of culture in the region dominated by former Anglo-phone states. Diving had a showing of 48% of the respondents. The next slots of major interest are occupied by small meetings and incentives which had showings of 36% and 31% of respondents representing 59% of the respondents respectively. Eco-tourism and honeymooners occupied the sixth place, each receiving the same number of respondents of 19%.

Figure III.5 Major Interests of Clients



Source: Mozambique Destination Survey, 2004

III.5.5 Main Competitors

The main competitor destinations are regarded as the following;

Country	% of Respondents
South Africa	31%
Kenya	19%
Mauritius	17%
Zanzibar/ Tanzania	17%
Zimbabwe	12%
Brazil, Madascar	10%
Cuba	5%
Seychelles	5%

South Africa is considered the biggest competitor with a showing of 31% of the respondents. **Kenya** comes in second with 19% saying it is their biggest competitor. **Mauritius** and **Tanzania / Zanzibar** come in third with 17% of respondents each indicating that it was a main competitor for tourists coming to Mozambique.

The reasons adduced for the above as major competitors are product similarity i.e. sun, sand and sea but more importantly price and airline connections, a point which is alluded to later on in the analysis.

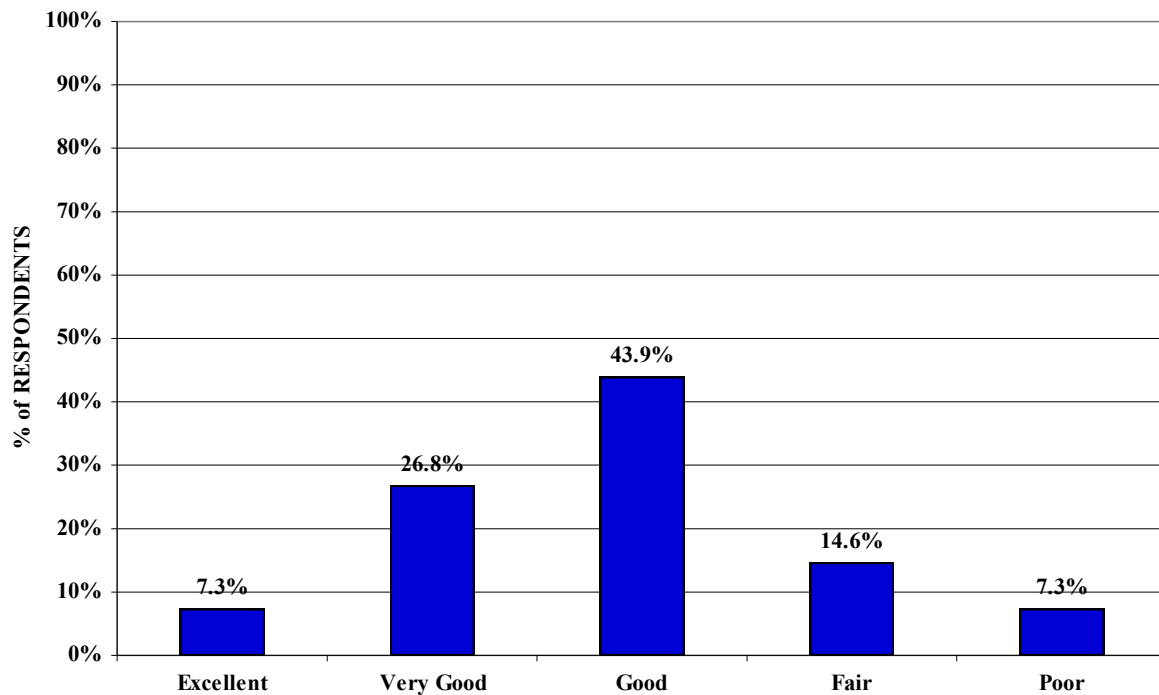
There are other countries which also feature as major competitors like Zimbabwe (after the current political crisis) because of products like the Victoria Falls.

Brazil and Madagascar got some mention again because of similar products.

III.5.6 Rating of Products and Services

Accommodation: 44% of respondents rated Tourist Accommodation as good with 27% rating it as very good. The overall average was good. Less than 10% rated accommodation as excellent (see Figure III.6)

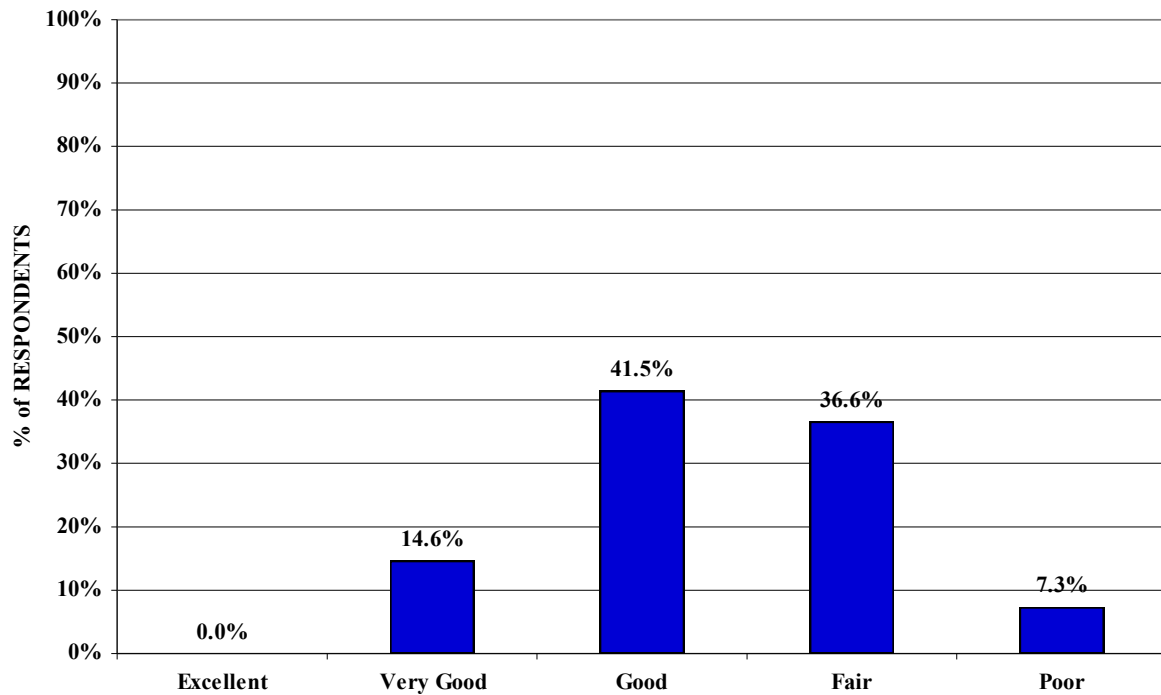
Figure III.6 Ranking of Accommodation



Source: Mozambique Destination Survey, 2004

Service Quality at Hotels: 43% of respondents rated service quality at hotels as good with 37% rating it as fair. The overall rating was fair to good but mainly good (see Figure III.7).

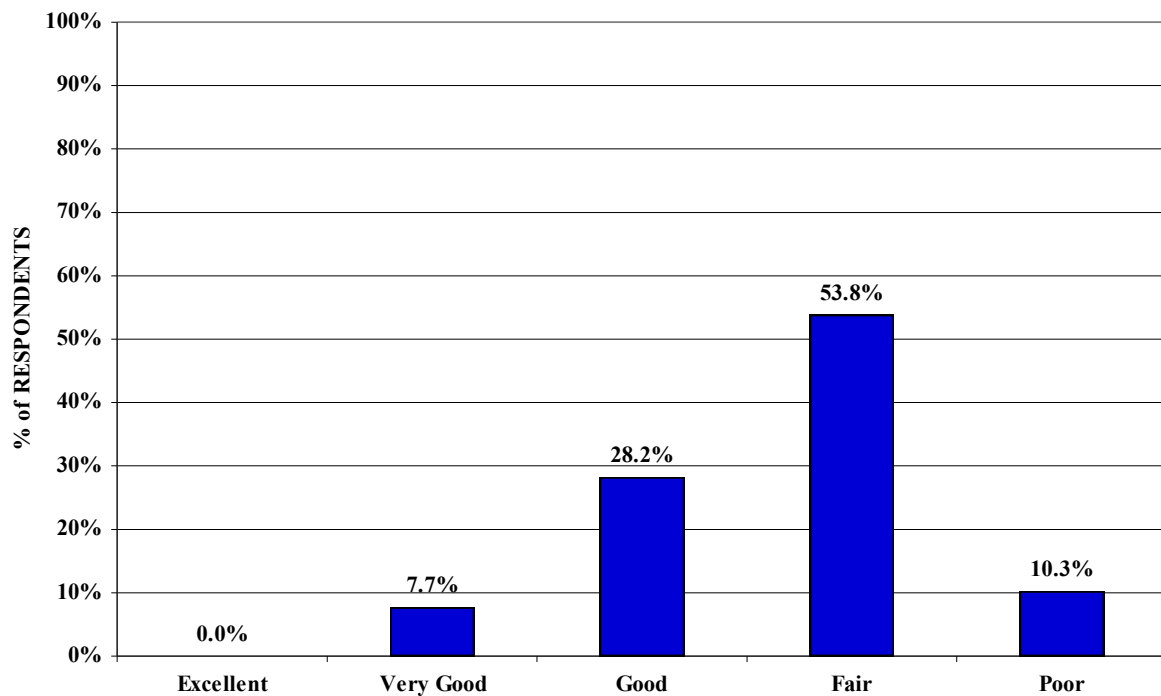
Figure III.7 Ranking of Quality Service at Hotels



Source: Mozambique Destination Survey, 2004

Service quality at other establishments: 54% of respondents rated service quality at other establishments as fair with 28% rating it as good. was also rated as fair.

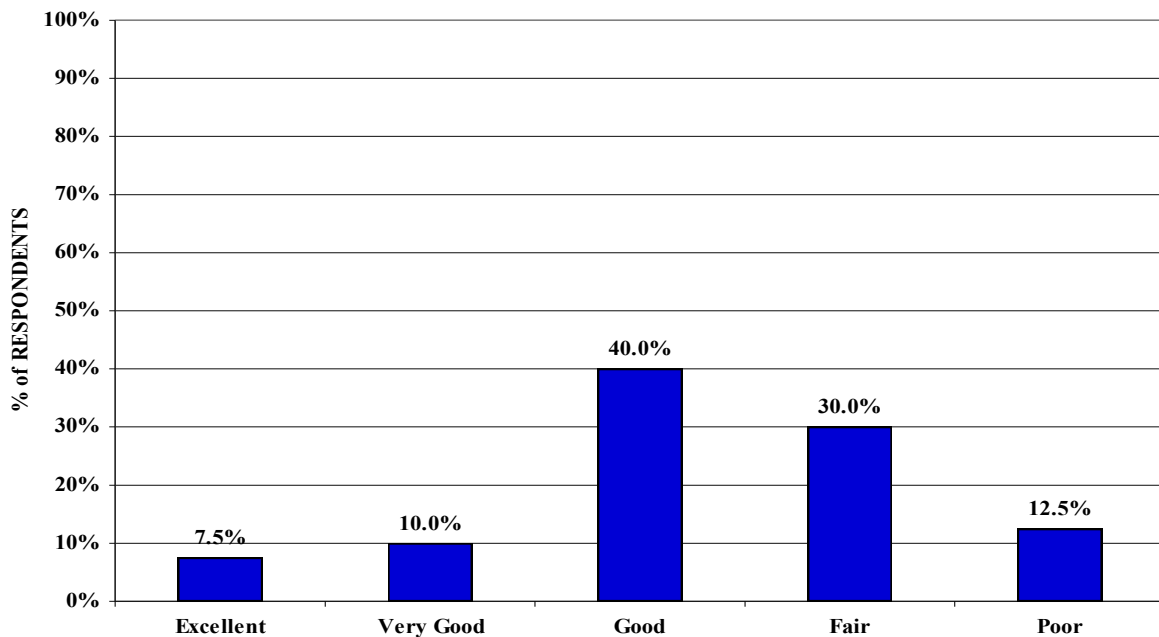
Figure III.8 Ranking of Quality Service at Other Establishments



Source: Mozambique Destination Survey, 2004

Car rental: 40% of respondents rated car rental as good with 30% rating it as fair. The overall average was mainly good.

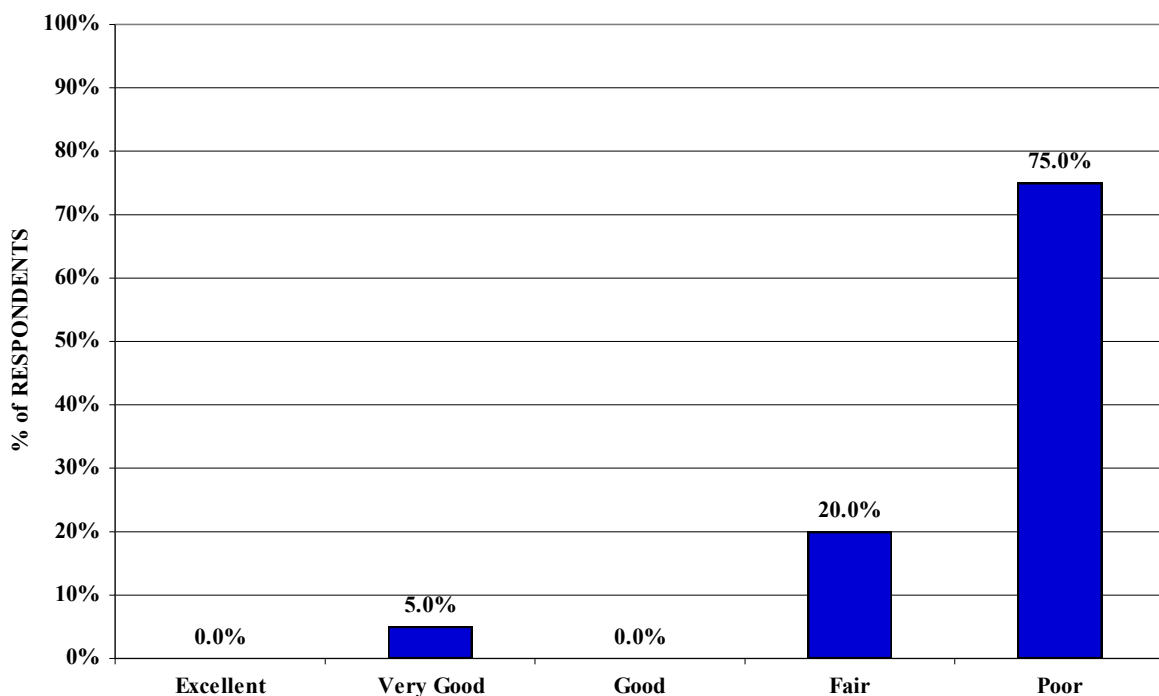
Figure III.9 Ranking of Quality Service at Car Rental Companies



Source: Mozambique Destination Survey, 2004

Golf: 75% of respondents rate golf as poor with 20% rating it as fair. The overall rating was mainly poor.

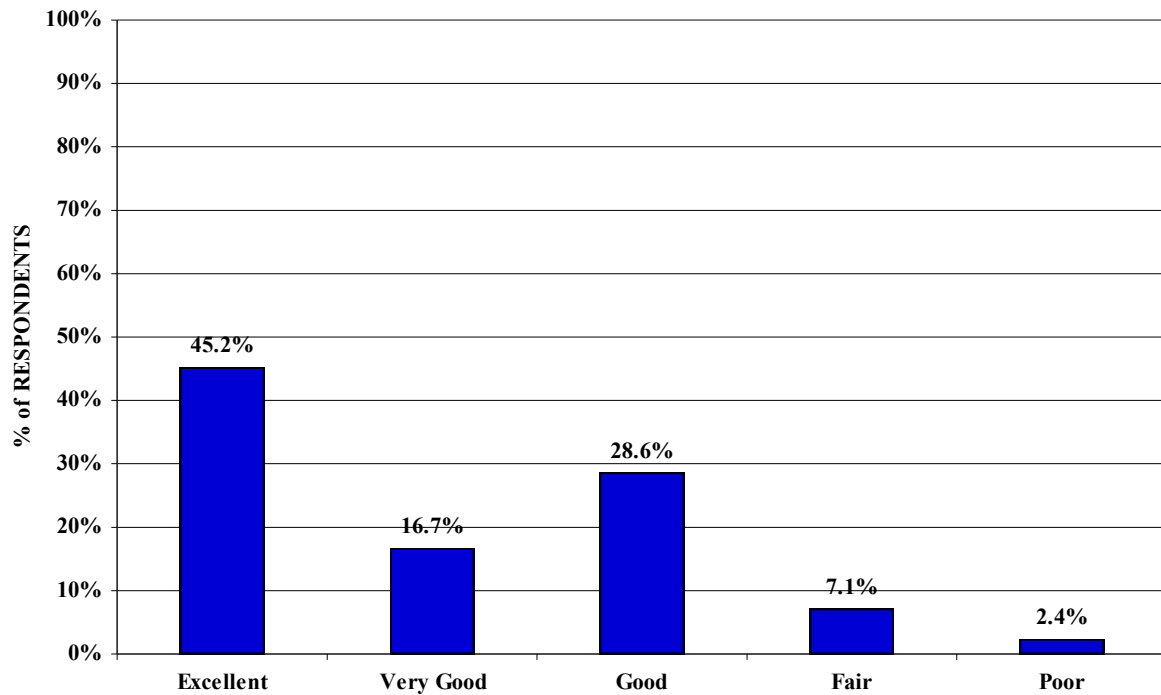
Figure III.10 Ranking of Golf



Source: Mozambique Destination Survey, 2004

Beaches: 45% of respondents rated Beaches as excellent with 29% rating it as good. The overall average rating was very good.

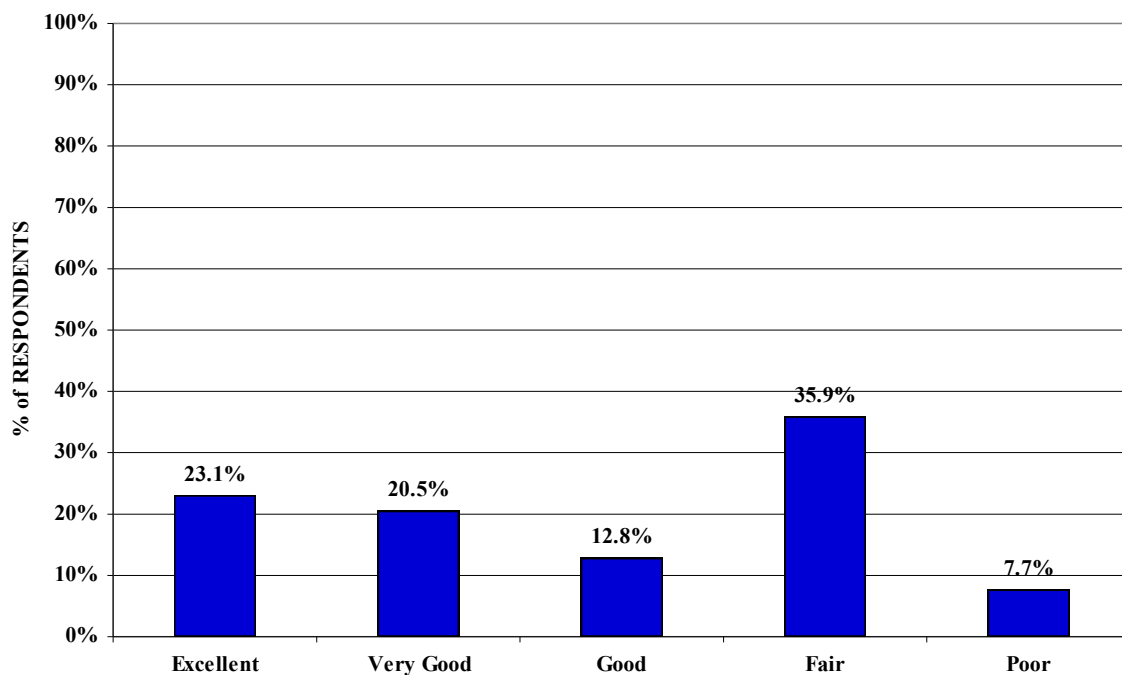
Figure III.11 Ranking of Beaches



Source: Mozambique Destination Survey, 2004

Water Sports: 36% of respondents rated watersports as fair with 23% rating it as excellent. The overall rating was mainly good.

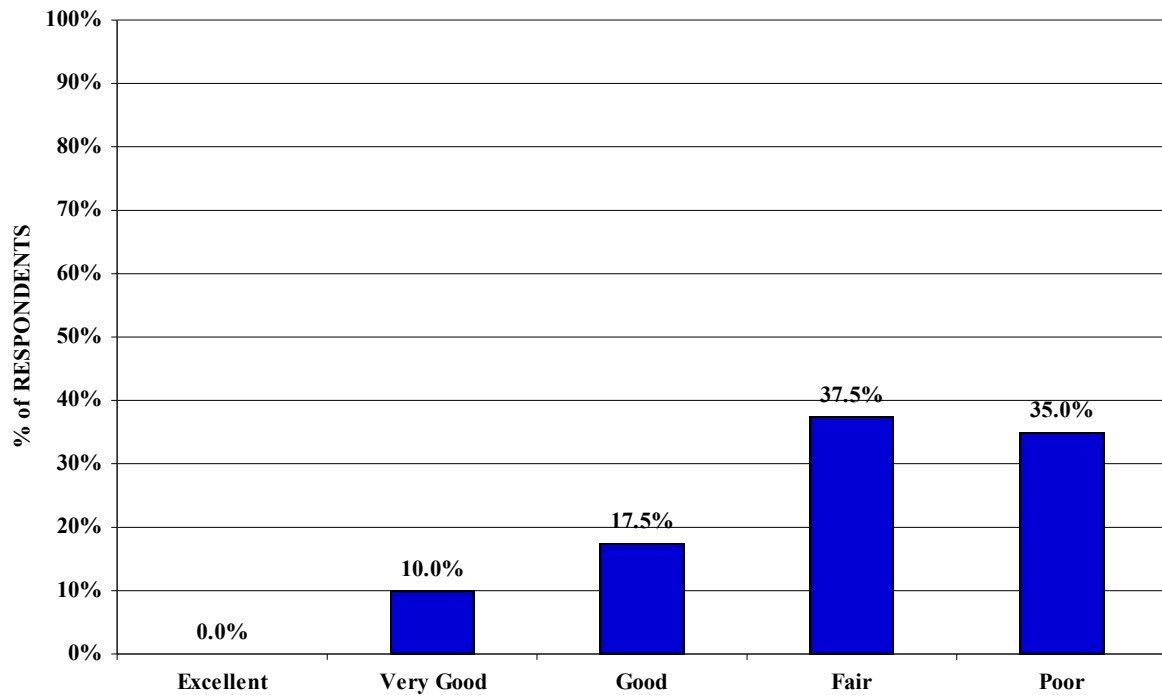
Figure III.12 Ranking of Watersports



Source: Mozambique Destination Survey, 2004

Infrastructure: 38% of respondents rated Infrastructure as Fair with 35% rating it as poor. The overall average rating was fair.

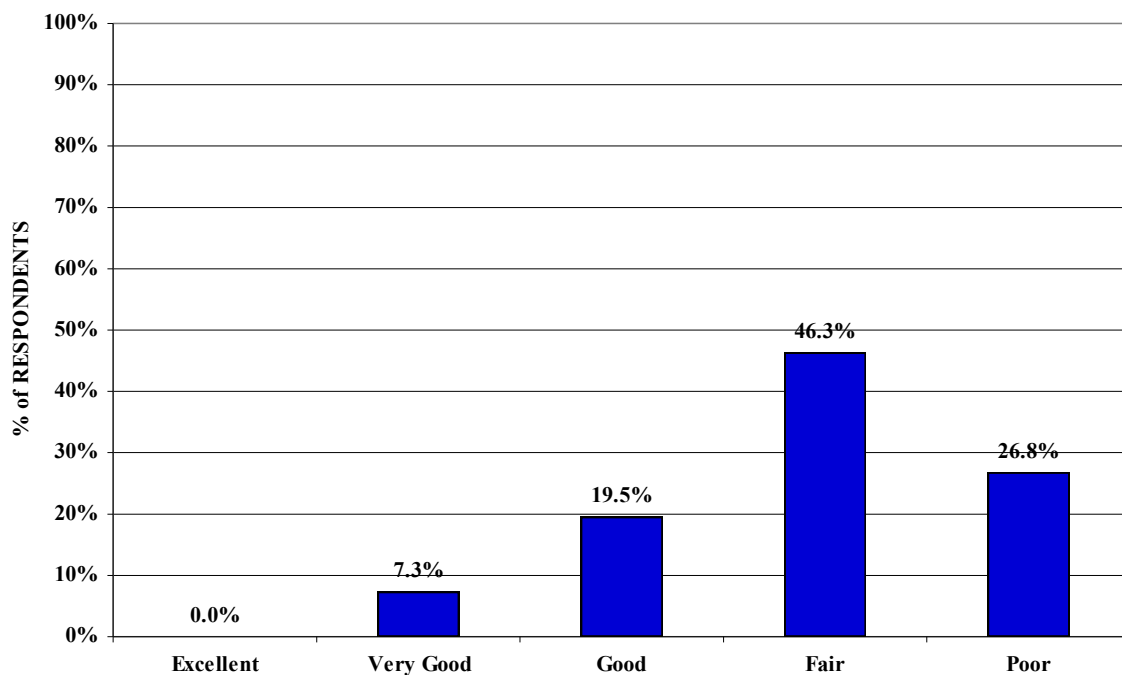
Figure III.13 Ranking of Infrastructure



Source: Mozambique Destination Survey, 2004

Airline connections: 46% of respondents rated airline connections as fair with 26.8% rating it as poor. The overall average rating was fair.

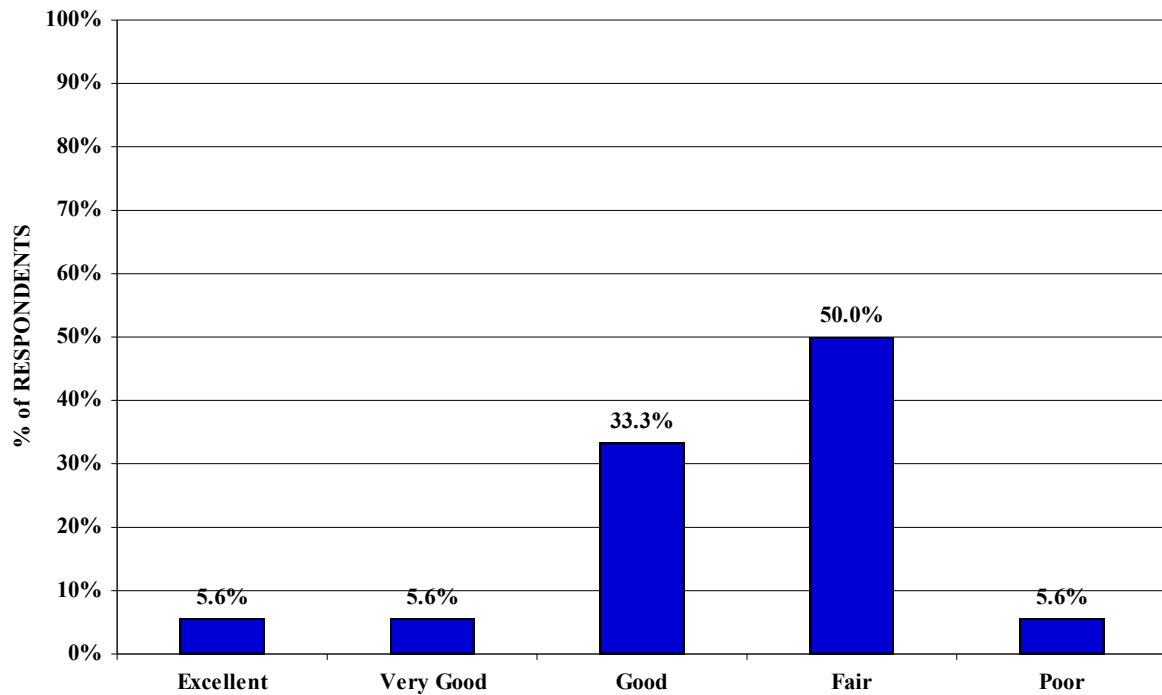
Figure III.14 Ranking of Airline Connections



Source: Mozambique Destination Survey, 2004

Other attractions: 50% of respondents rated other attractions as fair with 33% rating it as good. The overall average rating was fair to good but mainly good.

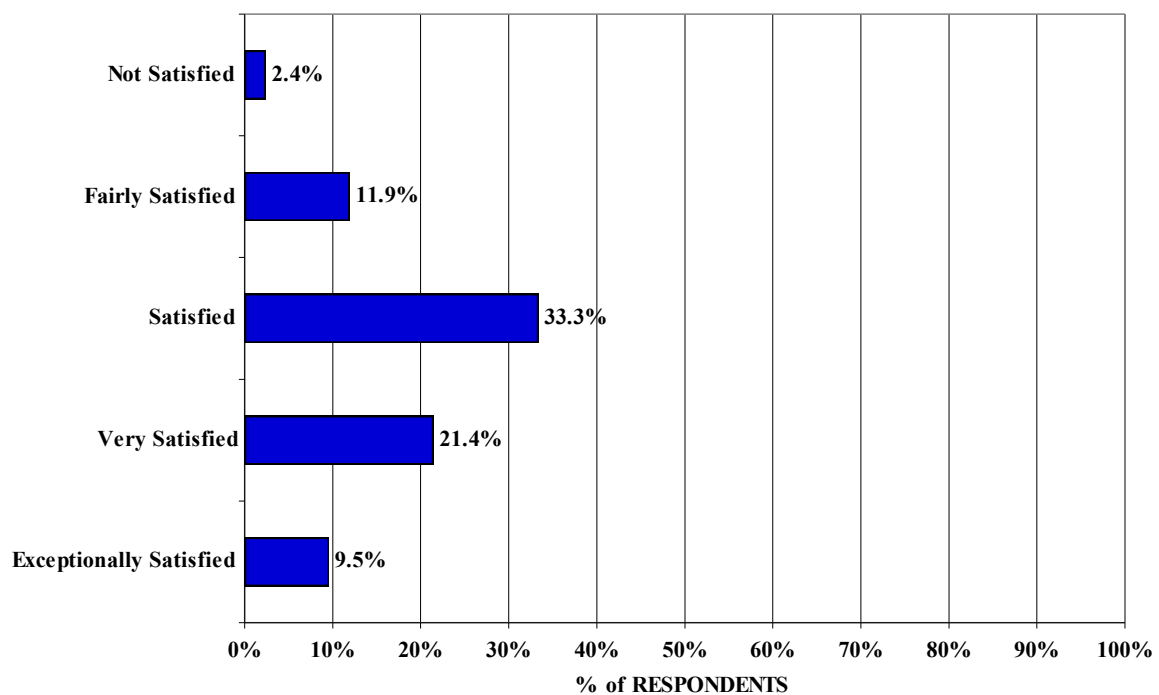
Figure III.15 Ranking of Other Attractions



Source: Mozambique Destination Survey, 2004

A third of respondents indicated that clients were satisfied with Mozambique, while 21% were very satisfied. It should be noted that 21% of those surveyed did not respond.

Figure III.16 Level of Satisfaction of Clients

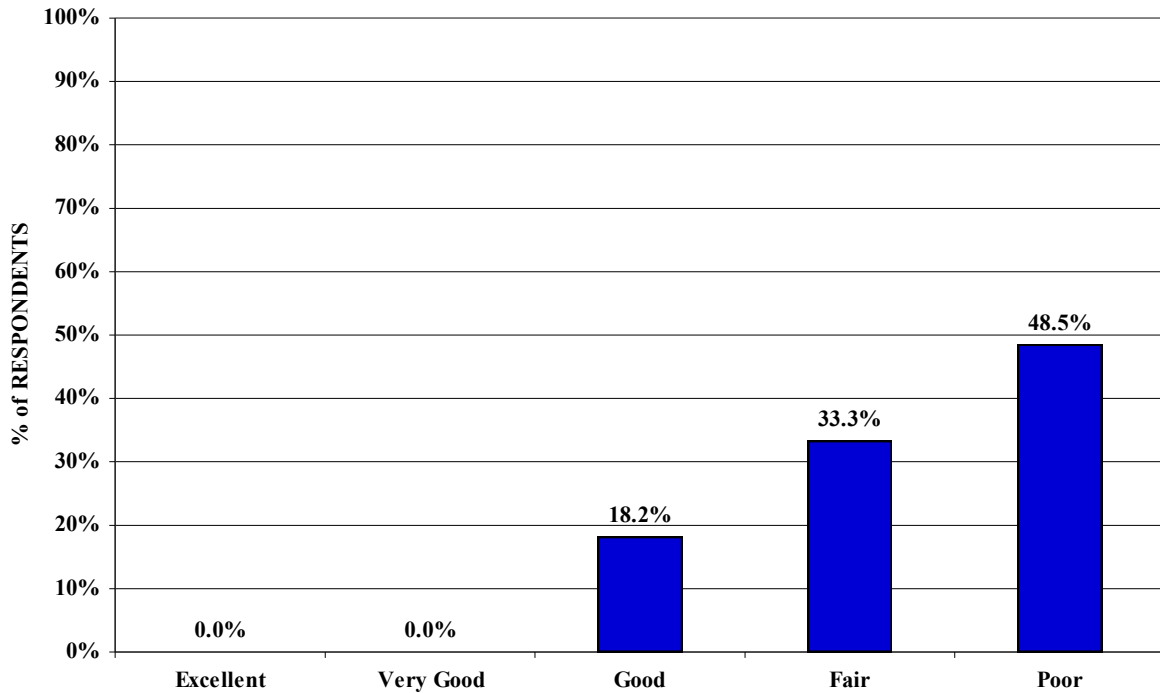


Source: Mozambique Destination Survey, 2004

III.5.7 Support from Mozambique Promotional Offices/Embassies in Overseas Markets

Out of the total respondents, 49% indicated that the support was poor and then 33% indicated that the support was fair.

Figure III.17 Support from Mozambique Promotional Offices



III.5.8 Key Strengths of Mozambique as a Destination

The following were mentioned as key strengths:

- Friendly People
- Sun, sand and sea
- Unspoilt and unexplored beaches
- Culture
- New game parks
- Diving, eco-tourism
- Game fishing
- History
- Latino-flavour

III.5.9 Weaknesses of Mozambique as a Destination

The following were indicated as some of the weaknesses:

- Price ie too expensive (domestic flights)
- Malaria

- poor service
- lack of tourism culture,
- low marketing synergies,
- visas,
- import duties,
- poor infrastructure,
- low skills
- fragmented industry
- poor airline connections
- immigration/customs formalities

III.5.10 Recommended Actions

- More flights between Mozambique and Portugal
- Reduce police controls between Ressano Garcia and Bilene
- Improve security on roads for South Africa self-drive market
- Build a better image of Mozambique in South Africa
- Visa costs to be reviewed
- Market Mozambique as a whole
- Embark on aggressive promotional strategies
- Introduce SADC Univisa
- Attend more travel trade shows
- Improve product knowledge of travel agents
- More generic marketing for Mozambique
- Introduce open skies policy for Mozambique
- Tourism Strategic Policy should be introduced
- Improve Infrastructure
- More visibility and road shows for Mozambique
- Market the Conference Centre
- Private sector to be coordinated
- Review airport departure taxes
- More direct flights between Johannesburg and the north of Mozambique
- Create more tourism events
- Introduce incentives and leisure marketing

III.5.11 Other Comments/Suggestions

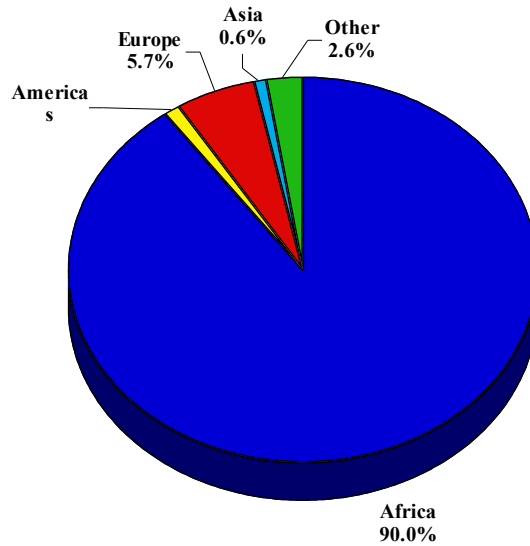
- ❖ Mozambique tour operators must be allowed to open branches in South Africa as South African companies do in Mozambique
- ❖ Make Pemba and Vilanculos airports bigger
- ❖ Improve medical facilities
- ❖ Introduce mechanisms to control leakages
- ❖ Calendar of events to be introduced
- ❖ Issues of security and visas to be reviewed
- ❖ Better product development, packaging and selling to be implemented
- ❖ Image of Mozambique overseas very poor
- ❖ Communication in English can improve tourism culture

- ❖ Need for top down vision so as to extol the benefits of tourism to ordinary people
- ❖ Need for a National Tourism Plan involving all stakeholders

IV. Market Situation

Of Mozambique's 900,000 plus visitors, residents of Africa account for 90% of visitor arrivals to Mozambique. Europe follows with nearly 6% while the Americas, Asia and Other account for the remaining 4% (see Figure IV.1).

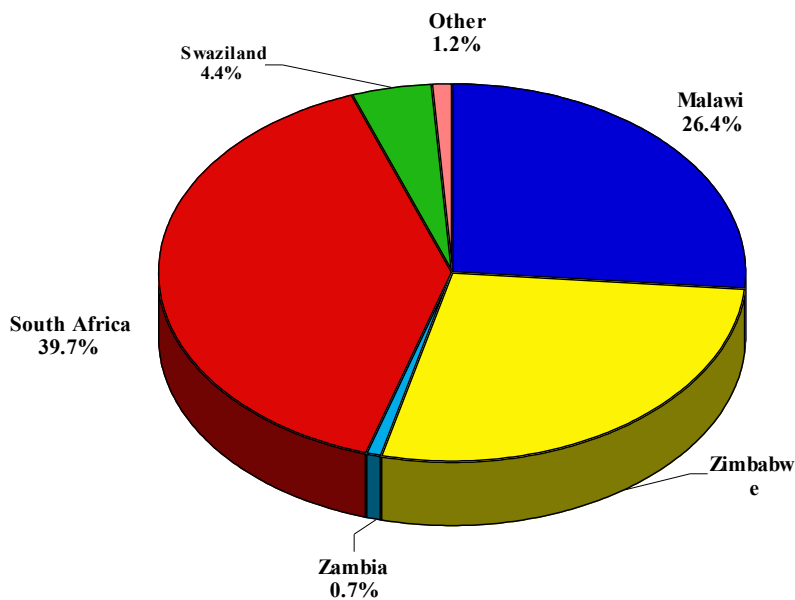
Figure IV.1 Visitor Arrivals by Main Markets 2002



Source: Mozambique National Institute of Statistics 2004

Nearly 40% of the African visitors to Mozambique originate from South Africa. Zimbabwe is the second largest African market with 27.5% of African visitors followed by Malawi with 26.4% of African visitors. South Africa, Zimbabwe and Malawi share borders with Mozambique and many of these visitors arrive by car.

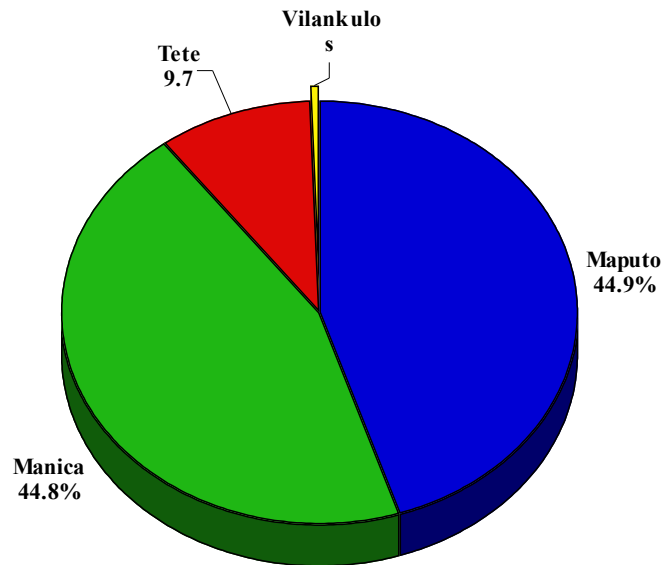
Figure IV.2 Visitor Arrivals from African Countries 2002



Source: Mozambique National Institute of Statistics 2004

Just over 90% of visitors to Mozambique are equally split arriving through the ports of Maputo and Manica. Tete is the third most popular port of entry followed by Vilankulos.

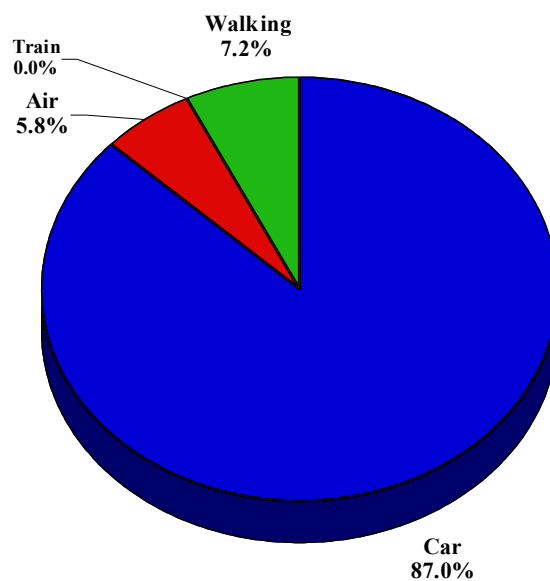
Figure IV.3 Visitor Arrivals by Port of Entry



Source: Mozambique National Institute of Statistics 2004

The main mode of transport into Mozambique is by car (see Figure IV.4). This is not surprising as Mozambique is bordered by South Africa, Malawi, Zimbabwe and Tanzania.

Figure IV.4 Visitor Arrivals by Mode of Transport

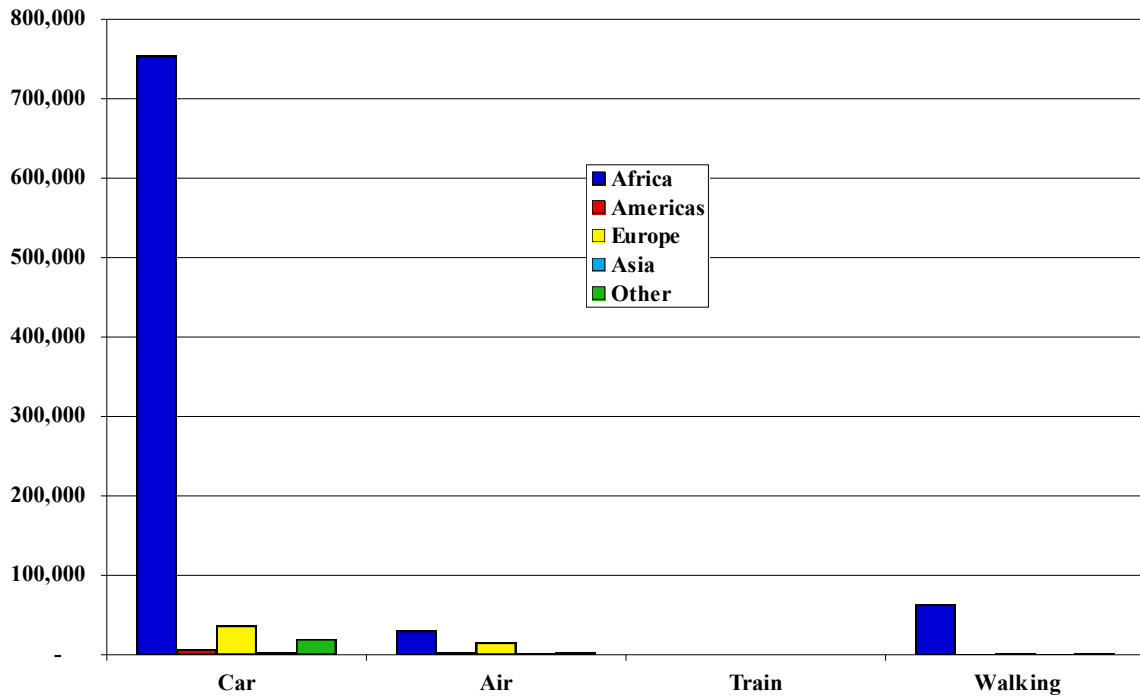


Source: Mozambique National Institute of Statistics 2004

The majority of visitors to Mozambique travel by car. Over 750,000 visitors from Africa travel by car accounting for nearly 90% of the visitors from Africa. Also interesting to note

is that over 35,000 Europeans visit Mozambique by car accounting for nearly 70% of the Europeans who visit Mozambique.

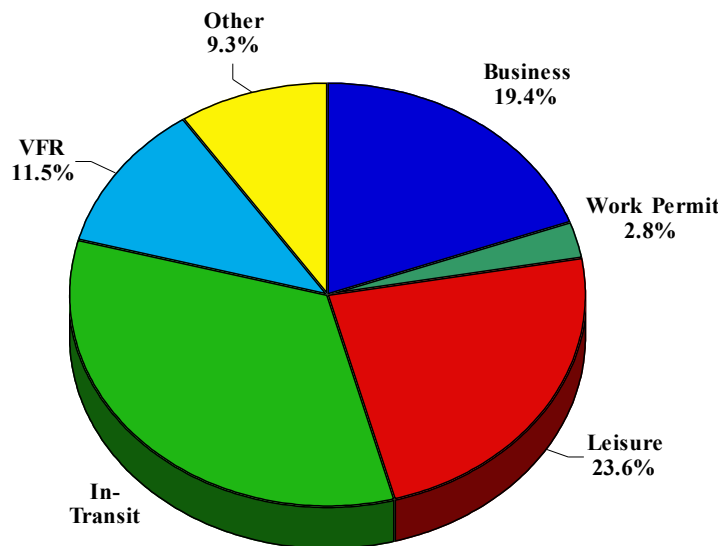
Figure IV.5 Mode of Transport by Region of Origin



Source: Mozambique National Institute of Statistics 2004

A third of the visitors to Mozambique are intransit while nearly a quarter visit for leisure. Nearly two fifths are on business while just over one tenth are visiting friends and relatives (see Figure IV.6).

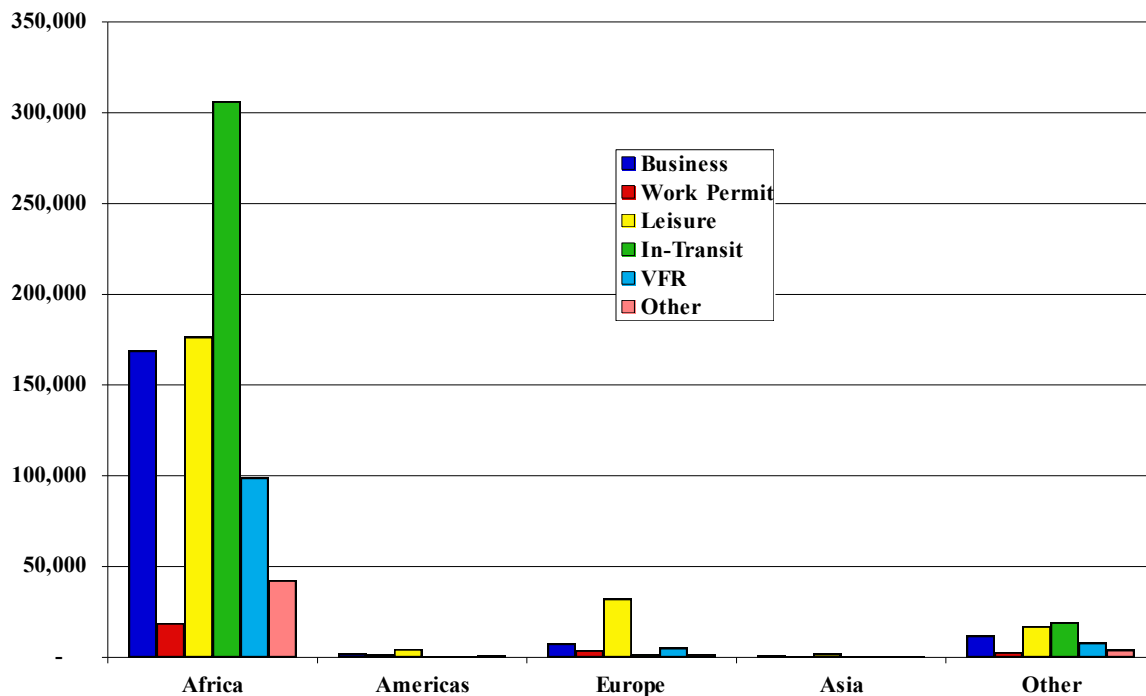
Figure IV.6 Visitor Arrivals by Purpose of Visit



Source: Mozambique National Institute of Statistics 2004

The majority of African visitors are intransit (see Figure IV.7). The second most popular reason for Africans travelling to Mozambique is leisure, followed by business and visiting friends and relatives. The most popular reason for Europeans traveling to Mozambique is for leisure, followed by business.

Figure IV.7 Purpose of Visit by Region of Origin

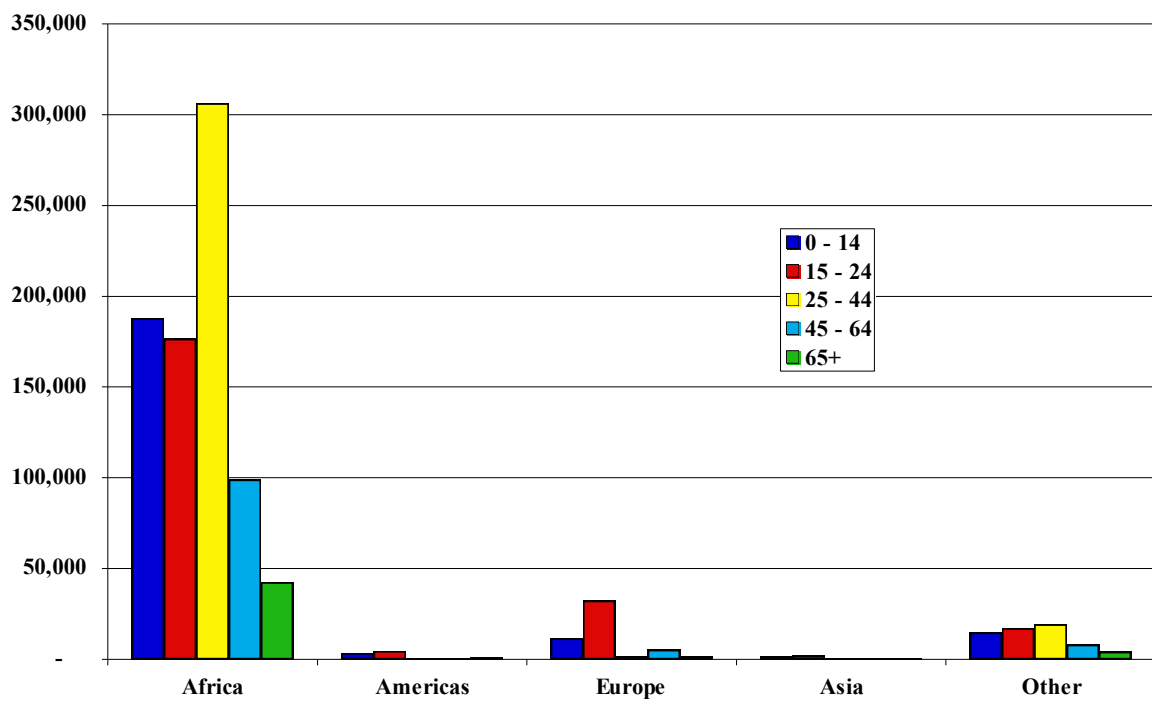


Source: Mozambique National Institute of Statistics 2004

Just over a third of the visitors to Mozambique are between the ages 25 and 44 years with just under a quarter between the ages 15 and 24 years. Over two fifths of the visitors to Mozambique are under 15 years while just over one tenth are in the 45 – 64 age group. The majority of Africans who visit Mozambique are also in the 25 – 44 age group followed by the under 15 and 15 – 24 age groups respectively (see Figure IV.8). For European visitors the largest number of persons are in the 15 – 24 age group (32,286 or just 00% of all European visitors).

It would be interesting to find out the reasons for travel of the Europeans in the 15 – 24 age group as this would identify what marketing messages draw them to Mozambique. In addition it would be useful to track how much this age group spent as this would also indicate they made a significant contribution to tourism expenditure.

Figure IV.8 Age of Visitors by Region of Origin



Source: Mozambique National Institute of Statistics 2004

V. Product Situation

V.1 Accommodation

There are 320 establishments with accommodation in 10 provinces accounting for 6,899 rooms. Nearly 40% of the room stock is located in Maputo City while just over 15% is located in Inhambane with another 10% in Sofala. Nampula and Maputo Province account for nearly 15% with the remaining 20% of room stock is scattered throughout 5 provinces.

Table V.1 Accommodation by Province

PROVINCE	No. of Establishments With Accommodation	% of Total	No. of Rooms	% of Total
Maputo City	71	22.2	2,686	38.9
Maputo Province	28	8.8	458	6.6
Inhambane	70	21.9	1,084	15.7
Gaza	25	7.8	267	3.9
Niassa	19	5.9	326	4.7
Nampula	25	7.8	523	7.6
Zambezia	18	5.6	283	4.1
Tete	31	9.7	385	5.6
Manica	16	5.0	207	3.0
Sofala	17	5.3	680	9.9
TOTAL	320	100	6,899	100

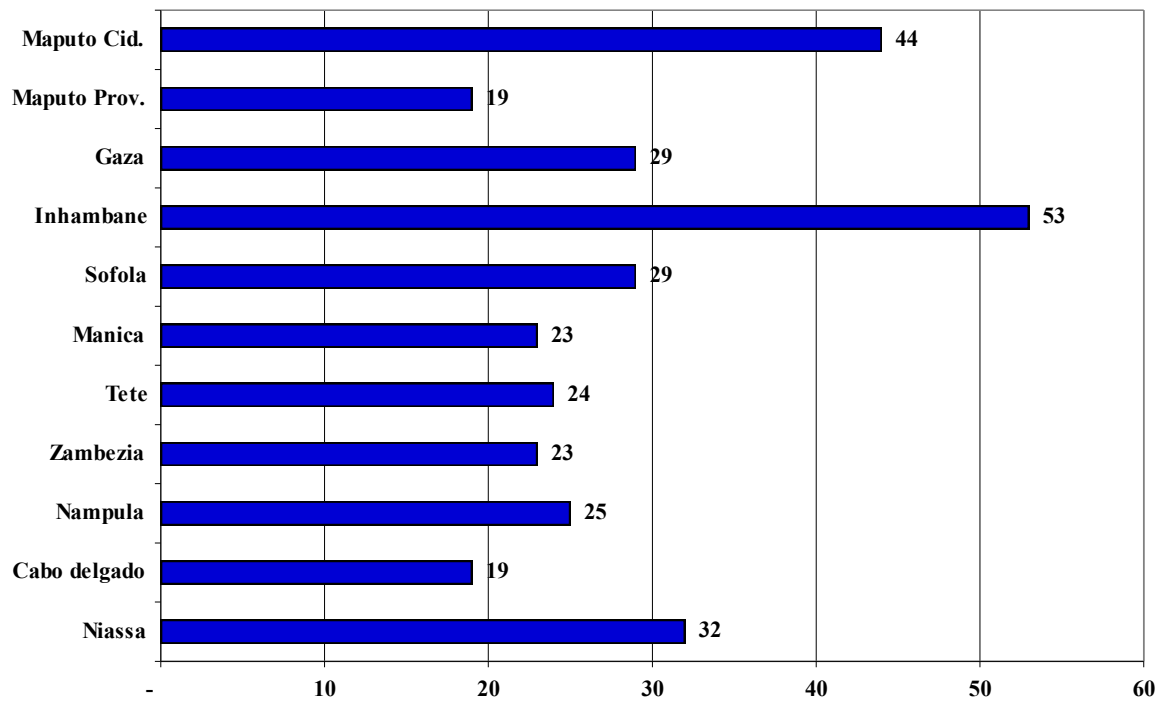
Source: Ministry of Tourism, Licensing Directorate

On examining the hotel stock Inhambane had the majority of hotels with 53 followed by Maputo with 44 hotels (see Figure V.2). These are followed by Gaza and Sofala with 29 hotels each. Interesting to note however is that the majority of hotel rooms (over 2000) are found in Maputo (see Figure V.3) while just over a quarter (590) of this number is found in Inhambane.

In terms of bed spaces, nearly 3,500 can be found in Maputo City while just over 1,100 are found in Inhambane (see Figure V.4).

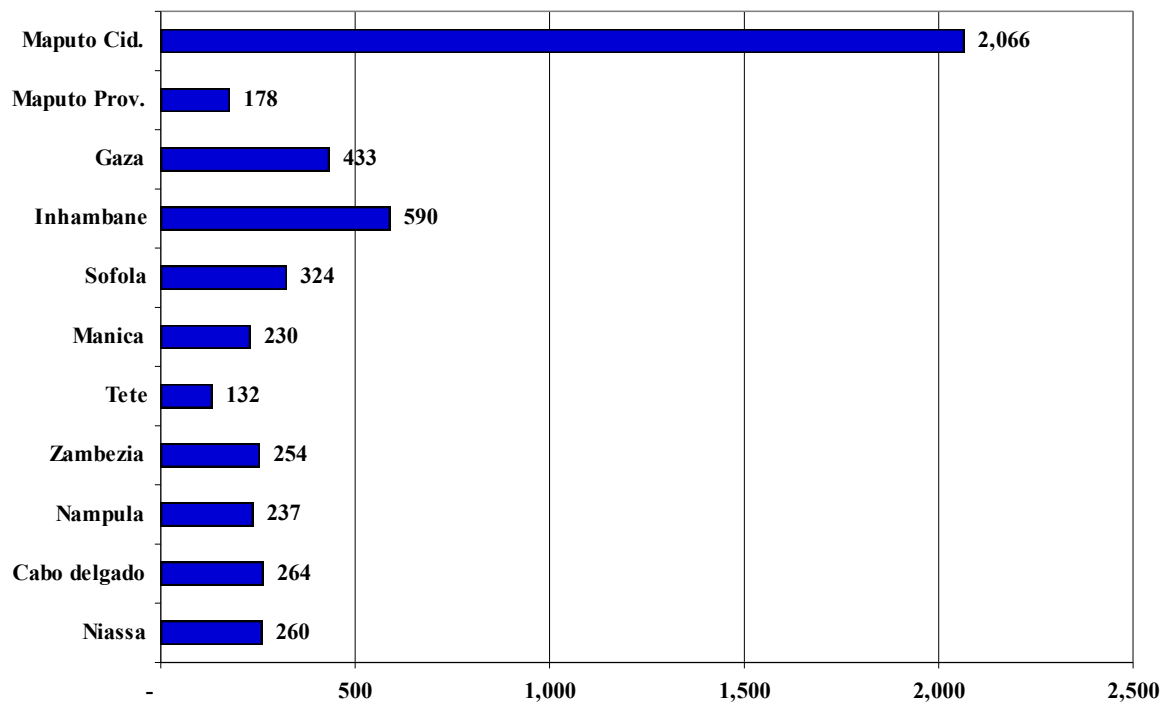
Not surprising therefore is the fact that the majority of restaurants (73) are also located in Maputo City (see Figure V.5)

Figure V.2 Hotels by Province



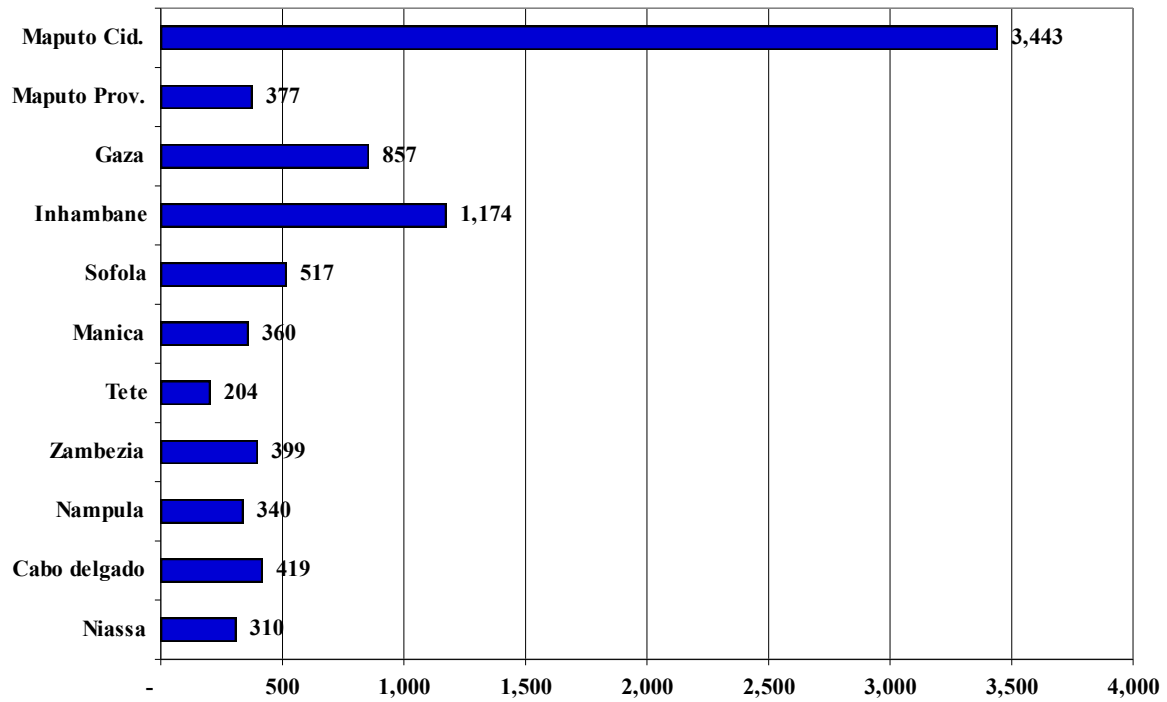
Source: National Institute of Statistics, 2004

Figure V.3 Rooms by Province



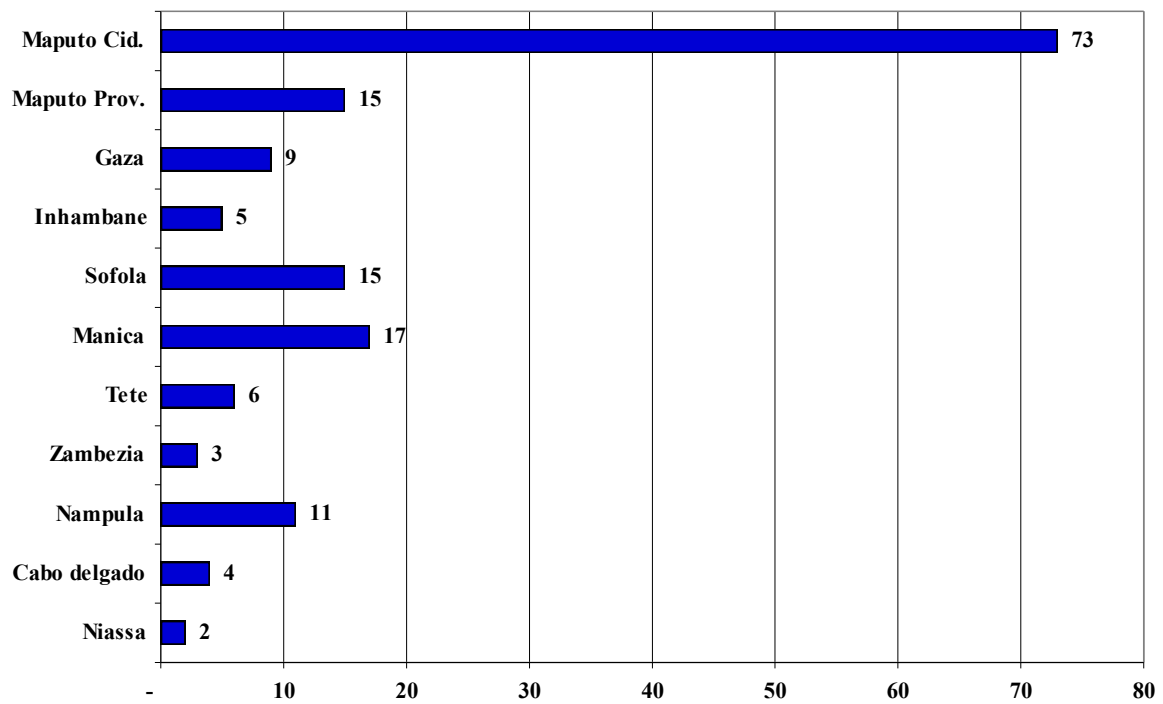
Source: National Institute of Statistics, 2004

Figure V.4 Beds by Province



Source: National Institute of Statistics, 2004

Figure V.5 Restaurants by Province



Source: National Institute of Statistics, 2004

V.2 Tourism Investment

The South of Mozambique is a clearly the region is where the most tourism development is taking place (see Table V.2). Since 1990, 35 new establishments have opened and just over half of those are located there. The infrastructure particularly relating to roads is in a much better condition compared to the Centre and North which were more ravaged by the civil war which ceased with the signing of the Peace Agreement in 1992.

The North of Mozambique has done relatively well where 12 properties have been opened since 1990. With a developed infrastructure, the North endowed with more tourism attractions than the other two regions could attract more tourism investment. The North boasts of Ilha de Mozambique and Ibo, which are unique islands with rich historical past. The Niassa Reserve is unspoilt virgin territory and therefore presents a window of opportunity for tourism development

The Centre has only 5 of all the new establishments which have opened their doors to tourism since 1990. When one examines the investments which have been rehabilitated since 1990, again the same scenario prevails where the South of Mozambique has completely dominated with 19 being found here. The other regions each had one establishment being brought back into operation.

Table V.2 Tourism Investment Since 1990

The Centre	New	Rehabilitated	Total Number
Zambezia	3	1	4
Manica	1		1
Sofala	1		1
Sub-Total	5	1	6
The North			
Cape Delgado	8	1	9
Niassa	2		2
Nampula	2		2
Sub-Total	12	1	13
The South			
Inhambane	5	1	6
Gaza	2	1	3
Maputo City	11	17	28
Sub-Total	18	19	37
Total	35	21	56

Source: Centro de Promoção de Investimentos (CPI)

Mozambique has taken advantage of the Tourism Business Forum in October 2004 to promote 20 potential tourism projects to European investors. Among the projects promoted were the revamping of Hotel Inhassoro Inhamba, a 32-bed hotel in a small fishing village facing Bazaruto Archipelago's Paradise Island; the development of Lakeshore Resort Village and Island Getaway as part of the Limpopo Valley Spatial Development Initiative; and investment partnerships to assist the Eko Turismo Gorongosa Agricola e Pecuaria Lda ecotourism project in rehabilitating 700 000 hectares of land, among others. Mozambique tourism minister, Fernando Sumbana, has confirmed the country's commitment to facilitating investments in the tourism sector. The three-day conference saw European and African

stakeholders discuss investment projects in tourism, the development of new tourism packages at a regional level, and technologies and services aimed at developing tourism programmes.

V.3 Attractions

Historically, Mozambique was considered one of the premier tourism destinations in Africa, renowned for its tropical beaches, cosmopolitan cities and world-class Gorogosa National Park. Mozambique's attractions can be characterized as follows:

- ⊕ Mozambique has a coastline of over 2500 Km^s
- ⊕ Most of this coastline is characterized by pristine beaches although they are not easily accessible
- ⊕ There is lack of both good quality and quantity accommodation in this coastline
- ⊕ Mozambique has three distinct geographical entities each possessing unique tourism attractions
- ⊕ There are key common product lines found in each geographical zone which are
 - Sun, sand and sea
 - Eco-tourism
 - Culture
- ⊕ The three geographical zones are:
 - The South consisting of
 - Maputo City
 - Maputo Province
 - Inhambane and
 - Gaza
 - The Centre consisting of
 - Sofala
 - Manica
 - Tete and
 - Zambezia
 - The North consisting of
 - Nampula
 - Cape Delgado and
 - Niassa

The following table highlights the tourism attractions by geographical zones: the South, the Centre and the North.

Table V.3 Mozambique Tourism Attractions

	The South	The Centre	The North
ATTRACTIONS	LOCATION		
Sun, Sand and Sea	Maputo, Bilene, Xai Xai, Macaneta	Sofala, Zambezia, Tete and Manica	Nampula Province particularly Praia de chocas –very popular beach Cape Delgado boasts of white sand and clear blue waters found at the Praia de Wimbe
Eco-tourism	The Transfrontier Conservation Area (TFCA) Mozambique. Maputo Elephant Reserve is one of the biggest conservation areas in the world covering 99,000 square kilometers. Consumption and non-consumptive hunting are found here. Ornithology also features very strongly as an attraction	Gorongosa National Park has abundance of wild life including lion, leopard, elephant, buffalo, hippo and crocodile. Birdlife galore. Zambezia province home to a great variety of mammals and birds Marromeu Reserve in Sofala Province being rehabilitated and restocked Big game viewing in Tete	Niassa Reserve considered one of the largest conservation zones in SADC. The reserve is home to over 12000 elephants as well as kudu, impala, wildebeest and zebras. Zvivorimbos National Park found in Cape Delgado is home to marine and terrestrial creatures
Culture	Historical tourism in Inhambane Maputo has arts, crafts and museums including a vibrant nightlife. Architectural buildings are also found in Maputo	Beira regarded as cultural commercial centre Rock paintings found in Manica Mozambique’s unique culture compared to neighbouring states is a unique consumer proposition. Mozambique possesses Latino culture which is very distinct from the Anglo-culture in the adjacent states.	Convergence of African, Arabian and Portuguese cultures through commodity trading and slavery. Nampula is home to UNESCO’s World Heritage Site popularly known as Ilha de Moçambique. This is an authentic slave trading post going back to over two hundred years ago. Nampula has an array of colonial buildings going back to Arabic and Portuguese

	The South	The Centre	The North
ATTRACTIONS	LOCATION		
			trading years with this part of the world.
Adventure Tourism	Diving in Inhambane and Bazaruto Island Deep sea fishing and sailing in Bazaruto Kayaking, windsurfing or snorkeling at Inhaca Island		Backpackers found on Lake Niassa from Malawi. 4x4 safari trips into Niassa Rescue
Urban Tourism	Maputo	Beira and other provincial centres	Found mostly in Provincial Centers like Pemba, Nacala and Nampula
Adventure/Aquatic Tourism		Sea fishing Surfing Hiking(Chimanimani) Hunting 4x4 safari rides	

Source: KPMG: Situational Analysis, February, 2004

Mozambique Land of Contrasts & RETOSA, the Essence of Africa 2003.

V.4 National Parks

About 15% of Mozambique is National Park (6), National Reserve (6) or Hunting Area (12). Mozambique is endowed with a variety of ecological systems that are rich in species, including large areas of marine and fresh water systems. With nearly 25,000 square kilometers of National Park area, the South Region dominates with four of the six National Parks (see Table VI.4). This reflects the pivotal position that the South plays in the tourism industry especially with the development of its infrastructure.

The North, although it possesses the biggest concentration of game, is not accessible and until the issue of accessibility is addressed, this area, despite being endowed with natural resources conducive to tourism development, will lag behind.

Table V.4 Mozambique National Parks

NAME	LOCATION	Geographical Location	AREA (KM ²)
Gorongosa National Park	Sofala	Centre	5.370
Zinave National Park	Inhambane	South	6.000
Banhine National Park	Gaza	South	7.000
Bazaruto National Park	Inhambane	South	1.600
Limpopo National Park	Gaza	South	10.000
Quirimbas National Park	Cabo Delgado	North	7.500

The hunting areas are to be found in only the Centre of Mozambique (see Table VI.5). This is despite the fact that the North has one of the biggest conservation areas in the country. This has also to be seen in the context of the Transfrontier National Parks found in the South which currently are in infancy. This is a regional joint venture between South Africa, Zimbabwe and Mozambique. It has resulted in the creation of one of the biggest conservation areas in the world and has immensely assisted Mozambique in re-stocking its wildlife herd which was decimated by the civil war. It has also assisted Mozambique in the creation of its product mix. Hunting consists of consumptive and non-consumptive hunting but as of now the emphasis is non consumptive hunting as conservation is an integral part of Mozambique's strategy to contribute to and benefit from regionally constructed tourism products and destinations.

VI.5 Hunting Areas

NAME	PROVINCE	GEOGRAPHICAL LOCATION	AREA (KM ²)
Hunting Area No.4	Manica	Centre	4.300
Hunting Area No.5	Sofala	Centre	6.868
Hunting Area No.6	Sofala	Centre	4.563
Hunting Area No.7	Sofala	Centre	5.408
Hunting Area No.8	Sofala	Centre	310
Hunting Area No.9	Manica	Centre	4.333
Hunting Area No.10	Sofala	Centre	2.008
Hunting Area No.11	Sofala	Centre	1.928
Hunting Area No.12	Sofala	Centre	2.963
Hunting Area No.13	Manica	Centre	5.683
Hunting Area No.14	Sofala	Centre	1.353
Hunting Area No.15	Manica	Centre	2.300

V.4 Air Access

There are six (6) airlines that operate within and to Mozambique. LAM, which is owned by the government of Mozambique, is the only airline that offers Domestic, Regional and International routes. TAP, the national airline of Portugal, offers International flights only.

Air Corridor, STA and MEX provide domestic service only, while South African Airways (SAA) offers both regional and international schedules (see Table V.5).

Table V.5 AIR ACCESS

	<i>NAME OF AIRLINE</i>	<i>ORIGIN</i>	<i>DOMESTIC</i>	<i>REGIONAL</i>	<i>INTERNATIONAL</i>
<i>1</i>	LAM	Maputo	✓	✓	✓
<i>2</i>	TAP	Lisbon			✓
<i>3</i>	Air Corridor	Nampula	✓		
<i>4</i>	STA	Maputo	✓		
<i>5</i>	MEX	Code sharing with LAM	✓		
<i>6</i>	SAA	Johannesburg Durban		✓	✓

VI. Market Niches in Mozambique

Mozambique is enormously endowed with a rich diversity of products but to aggressively and competitively position itself as a unique destination, the following are the niche segments it is strategically focusing on:

- ✓ Aquatic sports i.e. diving and deep sea fishing
- ✓ Ecotourism
- ✓ Adventure Tourism
- ✓ Cultural Tourism
- ✓ Ornithology or birding

VII. Competitive Situation

VII.1 Tourism Arrivals

In terms of tourism arrivals within the African region, South Africa is enjoying a buoyant growth thus vindicating the seriousness the government is taking tourism as an engine for economic growth. On the other end of the spectrum is Angola which, because of the civil strife, cannot in the scheme of things, be considered to be nurturing tourism as an economic activity.

At face value Mozambique seems to have done well for the two years they submitted the figures to WTO. This is reflected in the percentage change of 135% between 2001 and 2002. It is also pertinent to note that in 2001 Mozambique was ranked no. 8 among the 14 member states and in 2002 the ranking had improved to no. 3.

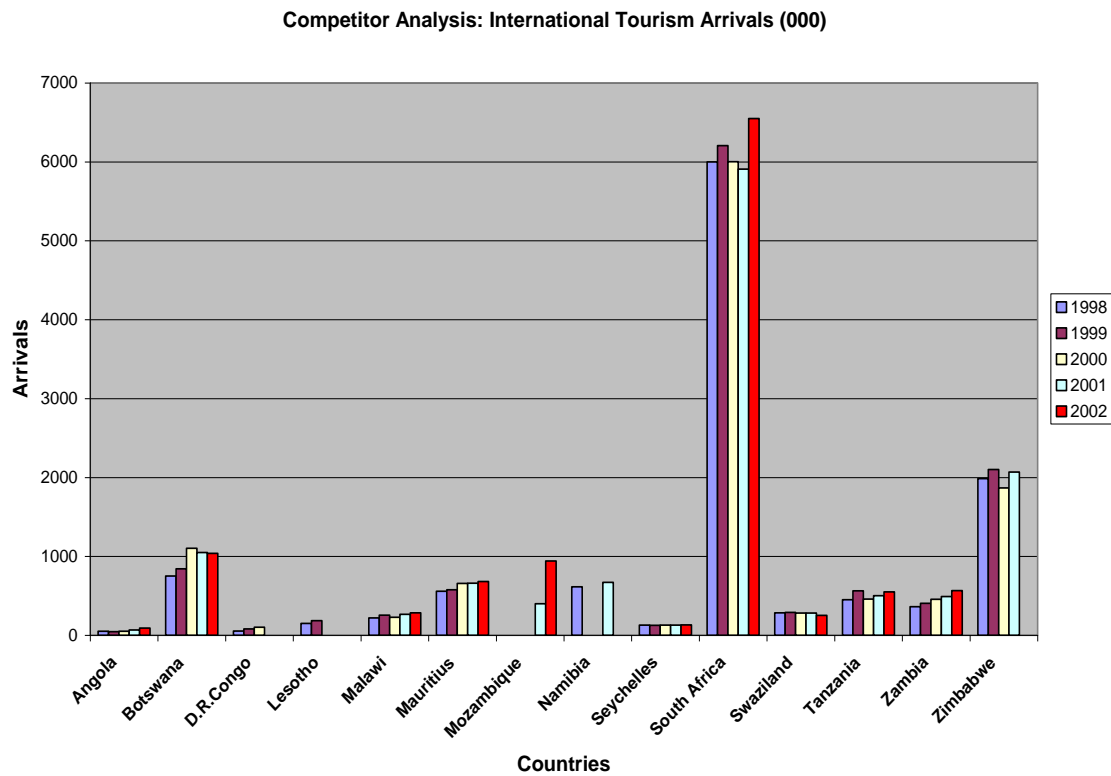
In analyzing these statistics one must always be cognizant of the fact that:

- i. the lack of compilation and collation of statistics specific for tourism affects the reliability and validity of the figures; and
- ii. the absence of breakdown per market segment, length of stay and spend per visitor implies these figures relate to all categories of visitors to Mozambique i.e. tourists and others. For an example, there is phenomenal interest in investment and trade in Mozambique and the donor community is tripping each other to make their presence felt. The capture of arrival figures by immigration department in the absence of proper passenger exit surveys begs the question of what percentage of those figures is actually tourists.

Table VII.1 International Tourism Arrivals (000) to Competing Destinations

Country	1998	1999	2000	2001	2002	Ranking based on 2002
Angola	52	45	51	67	91	10
Botswana	750	843	1104	1049	1037	2
D R Congo	53	80	103	-	-	
Lesotho	150	186	-	-	-	
Malawi	220	254	228	266	285	7
Mauritius	558	578	656	660	682	4
Mozambique	-	-	-	400	943	3
Namibia	614	-	-	670	-	
Seychelles	128	125	130	130	132	9
South Africa	5998	6206	6001	5908	6550	1
Swaziland	284	289	281	283	253	8
Tanzania	450	564	459	501	550	6
Zambia	362	404	457	492	565	5
Zimbabwe	1986	2110	1868	2068	-	

Figure VI.1



Source: WTO Compendium of Statistics 2004 Edition

VII.2 Tourism Receipts

On examining tourism receipts, South Africa is on a roller coaster being the market leader (see Figure VI.2). Tanzania comes second in ranking but enjoys greater growth of 22% and the number three slot goes to Mauritius. Mozambique occupies the number 5 slot although there is a decline in receipts from the previous year (see Table VI.1).

Tourism is predicated on three key pillars and which are *accessibility, attractions and accommodation*. It is no wonder, therefore, that in addition to the import of tourism to the economies of the top performers in SADC, as evidenced by the resources devoted to this industry by the respective governments, airlines have a pivotal role to play. South Africa is the hub serviced by 32 international airlines and seven domestic airlines. Tanzania is serviced by 15 international airlines and one domestic. Mauritius is serviced by 5 international airlines and one domestic while Mozambique is serviced by two international airlines and one domestic.

In carrying out competitor analysis for tourism receipts of the SADC member states figures, two important caveats must be observed:

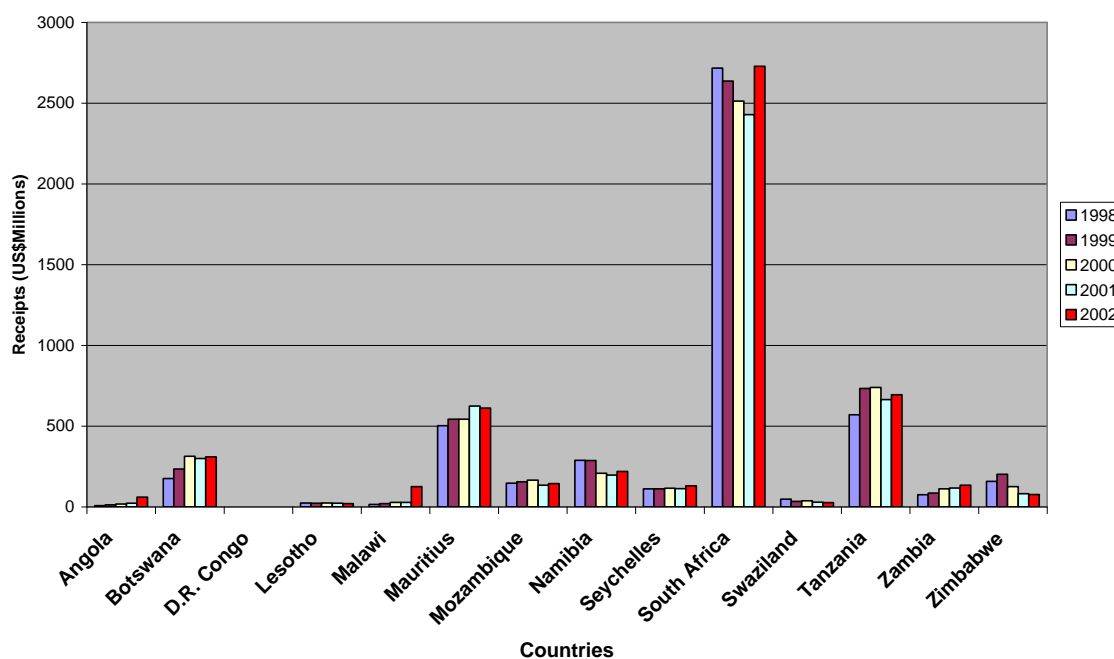
- certain countries have no mechanisms to disaggregate visitor arrival figures and therefore figures captured may not strictly relate to tourism. i.e. countries like Angola and the Democratic Republic of Congo.
- The social environment prevailing in some countries like Angola and the Democratic Republic of Congo then was not conducive for tourism generation.

Table VI.2 Tourism Receipts US\$ Million by Competing African Destinations

Country	1998	1999	2000	2001	2002	Ranking based on 2002
Angola	8	13	18	22	60	11
Botswana	175	234	313	300	309	4
D R Congo	-	-	-	-	-	14
Lesotho	24	23	24	23	20	13
Malawi	15	20	27	28	125	9
Mauritius	503	543	542	624	612	3
Mozambique	146	156	166	134	144	6
Namibia	288	287	208	197	219	5
Seychelles	111	112	115	113	130	8
South Africa	2717	2637	2513	2428	2728	1
Swaziland	47	34	37	29	26	12
Tanzania	570	733	739	664	694	2
Zambia	75	85	111	117	134	7
Zimbabwe	158	202	125	81	76	10

Figure VI.2

Competitor Analysis: Tourism Receipts US\$Millions



Source: WTO Compendium of Statistics 2004 Edition

VII.3 Competitive Packages

VIII. Distribution

IX. Macroeconomic Situation

The unprecedented terrorist attacks on the US on September 11th 2001 as well as the continued spate of terrorism attacks globally are having profound impacts on the travel and tourism sector worldwide. However, the travel and tourism industry has been resilient, consistently recovering from the Gulf War in 1991, the Asian financial crisis in 1997 and the Kosovo Conflict in 1999, and that it will certainly recover from the terrorist attacks of September 11, 2001. Indeed, history has shown that within one year of a major crisis, the tourism sector recovers. *Tourism Intelligence International* forecasts that international tourist arrivals will continue to grow and by 2005, an estimated 809 million persons will travel, even taking into account the terrorist attacks.

X. Opportunity and Issue Analysis

Mozambique's key strengths lie in:

- the quality of its beach product;
- the coastal and marine resources;
- the exotic ambience;
- diversified cultural profile of the country; and
- its natural and wildlife resources with high bio-diversity

It is one of few countries that can offer this diversity of products. Most of these products have not been fully developed because of many challenges to tourism development including but not limited to:

- poor infrastructure;
- insufficient resources and capacity in public sector;
- limited reliable statistical data to inform decisions and strategic planning;
- availability of skilled labour;
- investment procedures and private sector participation;
- participation by local communities;
- low investment levels; and
- the image and awareness of Mozambique as a tourism destination.

Mozambique will not be able to compete in the international market place on its own and linking into tourism in South Africa is a major opportunity for Mozambique. It is likely that tourism patterns in South Africa will partly determine the future structure of the sector in Mozambique. The top 8 source countries for the Republic of South Africa (RSA) in terms of arrivals and revenues, are the UK, Germany, US, France, Italy, Netherlands, Canada and Australia. The regional (African) market, which contributed to 65% of the arrivals in 2000 to RSA, and with expected high growth rates, also provides opportunities, mainly relating to shopping and entertainment and business tourism. Traditionally tourism flows to Mozambique have stemmed from South Africa (67% of arrivals) and Portugal (7.5% of arrivals in 2001). As competing in the 'saturated' traditional western source markets will be difficult and expensive, Mozambique is also looking at emerging source markets with cultural 'synergy' with Mozambique. Demand in Mozambique will stem from various segments including: business, leisure, visiting friends and relatives (VFR) and MICE (Meetings, Incentives, Conferences and Exhibition) for the domestic market; business, leisure, MICE and special interest for the regional market; and business, leisure, VFR, and special interest for international markets. Mozambique is increasingly developing niche markets, which, from a marketing perspective, are much more cost-effective and easier to target than the 'main-stream' markets.

XI. Objectives of the Marketing Plan

XII. Marketing Strategy

XII.1 Target Markets

Mozambique's target markets can be divided into three as follows:

1. *Natural Markets*
 - Domestic market – locals, expatriate and diplomatic
 - Portugal as a result of historical ties
 - South Africa because of proximity and economic prowess
 - Zimbabwe – traditional market
 - Swaziland because of proximity and relatively high disposable income
2. *Niche Markets*

Spain, Italy, USA, Germany and Netherlands
3. *Emerging “Synergy” Markets*
 - Brazil – linguistic and cultural synergies
 - Saudi Arabia – religious synergy because there is a strong Moslem community in Mozambique
 - UAE – religious and product attractions
 - Angola – historical and cultural synergies

XII.2 Positioning

The tourism development policy as enunciated by the Government of Mozambique is aimed at positioning the country as a high value low volume destination so as to foster sustainable and responsible tourism.

Mozambique's Tourism vision for 2020 is that it must be Africa's most vibrant, dynamic and exotic destination famous for its outstanding beaches and coastal attractions, exciting eco-tourism products and intriguing culture.

The key product opportunities which will make Mozambique realize its vision can be summarized as consisting of three product themes as follows:

- Water-based tourism experiences i.e. sun , sand and sea
- Nature based tourism experiences i.e. eco-tourism, adventure and wild life
- People and urban environment based experiences i.e. culture, entertainment and events.
-

However, the challenges to market and position Mozambique as a premier tourist destination in Africa are:

- Massive investment in developing, rehabilitating or adding value to these product lines.
- Proper packaging of these product lines and linking them to neighbouring states so as to create some synergies, and

- Natural attractions without commensurate skilled manpower will not result in high service delivery. Human resource development is therefore key in positioning Mozambique as a destination with a good image and high quality products.

Tourism is a highly competitive industry and therefore in addition to a range of first class product mix supported by skilled and friendly manpower, substantial financial resources are required to position and market Mozambique as a global brand able to attract its intended target customers and consumers. The current marketing budget is far from adequate in meeting the intended objectives but in the interim Mozambique can adopt a strategic focus on niche products integrated with the neighbouring states and thereby piggybacking on the success of established brands e.g. South Africa.

XII. Actions Programs

PROMOTION AND MARKETING BUDGET (FUTUR)

Period	Total Amount
2000-2003	\$914,036

ACTIVITIES BREAKDOWN

Activity	Allocation	% of Total Budget
Promotional Material (including advertising)	\$364,298	40%
Participation at Fairs	\$318,850	35%
Incentives for local fairs (Maputo, Gaza, Inhambane &Nampula)	\$2,605	0.1%
World Tourism Day	\$34,137	3.7%
Eclipse of the Sun	\$13,684	2.0%
Information Bureaux	\$2,492	0.1%
Tourism Development Assistance	\$177,970	19.1%
TOTAL	\$914,036	100%

Source: FUTUR

Period	Total Amount
2004	\$220,834

ACTIVITIES BREAKDOWN

Activity	Allocation	% of Total Budget
Tourism Fairs	\$95,833	43.4%
Promotional Material (including advertising)	\$104,167	47.2%
World Tourism Day	\$10,417	4.7%
Tourism Development Assistance	\$10,417	4.7%
TOTAL	\$220,834	100%

Source: FUTUR(National Tourism Fund)

It is interesting to note that certain marketing activities have either been curtailed or do not appear in the 2004 budget.

XIII. Projected Arrivals and Revenue over next 5 years

XIV. Controls – Mechanisms to Monitor the Plan’s Progress

Appendix 1 – The Questionnaires

Mozambique – UK Tour Operators’ Survey

1. Name of Tour Operator: _____
2. Name & Position of respondent: _____
3. Do you have a specific agent in Mozambique? Yes No
Name of Agents in Mozambique: 1 _____
(if applicable) 2 _____
3 _____
Comments _____
4. How many passengers did you send to the Mozambique in the last five (5) years and what were the average length of stay and the average price of package? (Please fill in according to data availability).

Year	No. of Passengers	Average Length of Stay	Average Price of Package (EUR or GB£)
1999			
2000			
2001			
2002			
2003			

If data is not available please complete the rest of the questionnaire.

5. By what percentage do you expect the Mozambique to be a source of growth for your company in the next three (3) years? (Check one only)

0% to 10%	<input type="checkbox"/>	Under -30%	<input type="checkbox"/>
11% to 20%	<input type="checkbox"/>	-29% to -20%	<input type="checkbox"/>
21% to 30%	<input type="checkbox"/>	-19% to -10%	<input type="checkbox"/>
over 30%	<input type="checkbox"/>	-9% to 0%	<input type="checkbox"/>

6. Which other Southern African destinations do you offer? (Check all that apply)

South Africa	<input type="checkbox"/>	Botswana	<input type="checkbox"/>
Swaziland	<input type="checkbox"/>	Tanzania	<input type="checkbox"/>
Zimbabwe	<input type="checkbox"/>	Namibia	<input type="checkbox"/>
Lesotho	<input type="checkbox"/>	Zambia	<input type="checkbox"/>
		Other _____	(please specify)

7. What types of holidays is your company interested in offering to Mozambique? (Check all that apply)

A.	Health and Wellness	<input type="checkbox"/>
B.	Culture Tourism	<input type="checkbox"/>
C.	Eco-Tourism	<input type="checkbox"/>
D.	Honeymoon Packages	<input type="checkbox"/>
E.	Incentive Travel	<input type="checkbox"/>
F.	Conferences	<input type="checkbox"/>
G.	Beaches	<input type="checkbox"/>
H.	Other (please specify) _____	

8. Which destinations do you consider to be the main competitors to Mozambique? (Check all that apply)

Botswana	<input type="checkbox"/>	Tanzania	<input type="checkbox"/>
Lesotho	<input type="checkbox"/>	Zimbabwe	<input type="checkbox"/>
South Africa	<input type="checkbox"/>	Namibia	<input type="checkbox"/>
Swaziland	<input type="checkbox"/>	Angola	<input type="checkbox"/>
		Other _____	(please specify)

9. How do you compare Mozambique with other destinations in the region?

10. How would you rate Mozambique in the following categories?

	Excellent	Very Good	Good	Fair	Poor
Tourist Accommodation					
Service quality at hotels					
Service quality at other establishments					
Tours					
Cultural Attractions					
Safety					
Value for money					
Other Attractions					
Water Sports					
Infrastructure					
Airline connections					

11. What feedback do you get from your clients on their return from the Mozambique?

12. What are the key strengths of the Mozambique as a tourism destination? (Check all that apply)

- Shopping
- Culture
- Value for Money
- Safety & Security

- Friendliness of People
- Tourism Accommodation
- Festivals and Events
- Beaches

Other _____ (please specify)

13. Please identify any weaknesses you may have observed in the Mozambique as a tourism destination?

- | | | | |
|-------------------|--------------------------|----------------------------|--------------------------|
| Air Access | <input type="checkbox"/> | Standard of accommodation | <input type="checkbox"/> |
| Range of Products | <input type="checkbox"/> | Lack of Consumer Awareness | <input type="checkbox"/> |
| Infrastructure | <input type="checkbox"/> | Quality of Service | <input type="checkbox"/> |
| | | Other _____ | (please specify) |

14. What will help you to sell more holidays to the Mozambique?

15. What actions would you like to see the Mozambique take to strengthen it's position in the market?

16. Are there any other comments or suggestions that you would like to share with us?

Thank you very much. Your comments are greatly appreciated.

Please email completed questionnaire to apoon@tourism-intelligence.com or fax to +49-521-163884.

With best regards

Dr. Auliana Poon
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Portuguese Tour Operator Survey

Mocambique – Pesquisa Operadores Turisticos

1. Nome do Operador Turistico: _____

2. Nome & Cargo do Inquirido: _____

3. Possui um agente em Mocambique? Sim Nao

Nome do Agente em Mocambique: 1 _____

(se for o caso)

2 _____

3 _____

Comentarios _____

12. Quantos passageiros enviou para Mocambique nos ultimos cinco (5) anos, qual foi a media de dias da estadia e o preco do pacote turistico? (favor preencher de acordo com os dados disponiveis).

Ano	No. de Passageiros	Media de Dias	Media preco pacote (EURO ou GB£)
1999			
2000			
2001			
2002			
2003			

Nota: Se nao dispoe de dados por favor responda ao resto do questionario.

13. Qual a percentagem de crescimento que preve que Mocambique ira representar para o seu negocio nos proximos tres (3) anos? *(escolha um so)*

0% a 10%	<input type="checkbox"/>	Menos de -30%	<input type="checkbox"/>
11% a 20%	<input type="checkbox"/>	-29% a -20%	<input type="checkbox"/>
21% a 30%	<input type="checkbox"/>	-19% a -10%	<input type="checkbox"/>
mais de 30%	<input type="checkbox"/>	-9% a 0%	<input type="checkbox"/>

14. Que outros paises de destino oferece a Sul do Continente Africano? *(Escolha todos os que se aplicam ao seu caso)*

Africa do Sul	<input type="checkbox"/>	Botswana	<input type="checkbox"/>
Swazilandia	<input type="checkbox"/>	Tanzania	<input type="checkbox"/>
Zimbabwe	<input type="checkbox"/>	Namibia	<input type="checkbox"/>
Lesotho	<input type="checkbox"/>	Zambia	<input type="checkbox"/>
Malawi	<input type="checkbox"/>	Angola	<input type="checkbox"/>

Outros _____ *(favor especificar)*

15. Que genero de ferias esta a sua Companhia interesada em oferecer em Mocambique? *(indique todos os que se aplicam)*

A.	Saude e Bem Estar	<input type="checkbox"/>
B.	Turismo Cultural	<input type="checkbox"/>
C.	Eco-Tourismo	<input type="checkbox"/>
D.	Luas de Mel	<input type="checkbox"/>
E.	Viagens Incentivo	<input type="checkbox"/>
F.	Conferencias	<input type="checkbox"/>
G.	Praias	<input type="checkbox"/>

H. Outros (favor especificar) _____

16. Que destinos considera oferecerem maior competicao a Mocambique? *(indique todos os que se aplicam)*

Africa do Sul	<input type="checkbox"/>	Botswana	<input type="checkbox"/>
Swazilandia	<input type="checkbox"/>	Tanzania	<input type="checkbox"/>
Zimbabwe	<input type="checkbox"/>	Namibia	<input type="checkbox"/>
Lesotho	<input type="checkbox"/>	Zambia	<input type="checkbox"/>
Malawi	<input type="checkbox"/>	Angola	<input type="checkbox"/>

Outros _____ *(favor especificar)*

17. Como compara Mocambique em relacao a outros destinos na regioa?

18. Como classifica Mocambique nas seguintes categorias?

<i>Por favor escolha um por linha</i>	Excelente	Muito Bom	Bom	Razoavel	Fraco
Acomodacao Turistica					
Qualidade Servicos Hotéis					
Qualidade Servicos noutros estabelecimentos					
Tours					
Atraccoes Culturais					
Seguranca					
Custo de Vida					
Outras Atraccoes					
Desportos Aquaticos					
Infraestructuras					
Ligacoes Aereas					

19. Que feedback recebe dos seus clientes apos o regresso de Mocambique?

20. Quais os pontos fortes de Mocambique como destino turistico?

(indique todos os que se aplicam)

Shopping/souvenirs

Cultura

Custo de Vida

Seguranca

Simpatia da Populacao

Acomodacao Turistica

Festivais e Eventos

Praias

Outros _____ *(favor especificar)*

13. Por favor identifique as fraquezas que tenha observado em Mocambique como destino Turistico?

Ligacoes Aereas

Gama de Produtos

Infraestructuras

Qualidade de Acomodacoes

Proteccao do Consumidor

Qualidade dos Servicos

Outros _____(favor especificar)

14. Que aspectos considera que poderiam contribuir para aumentar a venda de ferias em Mocambique?

15 Que tipo de accoes gostaria que Mocambique tomasse para fortalecer a sua posicao no mercado.

15. Que comentarios ou segestoes gostaria de partilhar connosco?

Obrigado pela sua cooperacao. O seus comentarios sao altamente apreciados e de imenso valor.

Por Favor envie e-mail com questionario preencido para info@tourism-intelligence.com ou fax para.: 00-49-521-163884.

With best regards

Dr. Auliana Poon
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Website: <http://www.tourism-intelligence.com>

German Tour Operator Survey

Umfrage bei deutschen Reiseveranstaltern

1. Name des Reiseveranstalters: _____
2. Name und Funktion des Antwortenden: _____
3. Haben Sie eine Vertretung in Mosambik? Ja Nein
 Name der Vertretung in Mosambik:
 1. _____
 2. _____
 3. _____
 Kommentar _____

4. Wie viele Kunden konnten sie in den letzten fünf (5) Jahren für Mosambik verbuchen und wie lange betrug die durchschnittliche Aufenthaltsdauer und der Durchschnittspreis des Pakets? (Bitte füllen Sie die Tabelle mit zur Verfügung stehenden Daten aus):

Jahr	Zahl der Passagiere	Durchschnittsaufenthalt	Durchschnittspreis des Pakets (EUR)
1999			
2000			
2001			
2002			
2003			

Falls Ihnen diese Daten nicht zur Verfügung stehen, füllen Sie bitte den Rest des Fragebogens aus.

5. Um wieviel Prozent wird Mosambik in den nächsten 3 Jahren zum Wachstum Ihres Unternehmens beitragen? (Bitte nur ein Kreuz vergeben)

0% bis 10%	<input type="checkbox"/>	Unter -30%	<input type="checkbox"/>
11% bis 20%	<input type="checkbox"/>	-29% bis -20%	<input type="checkbox"/>
21% bis 30%	<input type="checkbox"/>	-19% bis -10%	<input type="checkbox"/>
über 30%	<input type="checkbox"/>	-9% bis 0%	<input type="checkbox"/>

6. Welche anderen südafrikanischen Reiseziele bieten Sie an? (Bitte alle Zutreffenden ankreuzen)

Südafrika	<input type="checkbox"/>	Botswana	<input type="checkbox"/>
Swasiland	<input type="checkbox"/>	Tansania	<input type="checkbox"/>

Zimbabwe	θ	Namibia	θ
Lesotho	θ	Zambia	θ
		Andere	_____ (bitte ausführen)

7. Welche Form von Urlaubsreisen würden Sie gern in Mosambik anbieten?

A.	Gesundheit und Wellness	θ
B.	Kulturreisen	θ
C.	Ökotourismus	θ
D.	Hochzeitsreisen	θ
E.	Incentives	θ
F.	Tagungen und Kongresse	θ
G.	Strandurlaub	θ
H.	Andere (welche?)	_____

8. Welche Reiseziele sehen Sie als Hauptkonkurrenten von Mosambik an? (Bitte alle Zutreffenden ankreuzen)

Botswana	θ	Tansania	θ
Lesotho	θ	Zimbabwe	θ
Südafrika	θ	Namibia	θ
Swasiland	θ	Angola	θ
		Andere	_____ (bitte ausführen)

9. Wie hält Mosambik im Vergleich zu anderen Reisezielen der Region stand?

10. Wie schätzen Sie Mosambik anhand der nachfolgenden Kriterien ein?

	Hervorragend	Sehr gut	Gut	Weniger gut	Schlecht
Beherbergung/Unterbringung					
Dienstleistungsqualität im Hotel					
Dienstleistungsqualität in anderen Einrichtungen					
Touren					
Kulturelle Angebote					
Sicherheit					
Preis-/Leistungsverhältnis					
Andere Attraktionen					
Wassersportaktivitäten					
Infrastruktur					
Flugverbindungen					

11. Wie sind Ihre Kunden mit den gebuchten Reisen nach Mosambik zufrieden?

12. Was sind die Stärken von Mosambik als Tourismusdestination? (Bitte alle Zutreffenden ankreuzen)

Freundlichkeit	<input type="checkbox"/>	Unterbringung	<input type="checkbox"/>
Kultur	<input type="checkbox"/>	Veranstaltungen	<input type="checkbox"/>
Preis-/Leistung	<input type="checkbox"/>	Strände	<input type="checkbox"/>
Sicherheit	<input type="checkbox"/>	Andere _____	(bitte ausführen)

13. Was sind die Schwächen von Mosambik als Tourismusdestination?

Erreichbarkeit mit Flugzeug	<input type="checkbox"/>	Standard der Unterbringung	<input type="checkbox"/>
Produktvielfalt	<input type="checkbox"/>	Mangel an PR und Kundennähe	<input type="checkbox"/>
Infrastruktur	<input type="checkbox"/>	Servicequalität	<input type="checkbox"/>
		Andere _____	(bitte ausführen)

- Welche Maßnahmen sind für Sie notwendig, mehr Urlaubsreisen nach Mosambik zu verkaufen?

- Welche Maßnahmen sollte Mosambik unternehmen , um seine Marktposition zu stärken?

- Möchten Sie noch etwas hinzufügen oder gibt es sonst noch etwas, was Ihnen wichtig ist, uns mitzuteilen?

Vielen Dank für Ihre Mitarbeit und dass Sie sich die Zeit genommen haben, die Fragen zu beantworten.

Bitte senden Sie uns den ausgefüllten Fragebogen als E-Mail an: apoon@tourism-intelligence.com or per Fax to +49-521-163884.

Mit freundlichen Grüßen

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Mozambique Destination Survey

Name & Position of respondent

NAME	
ORGANISATION	
POSITION	

Contact details of respondent

Address	
Telephone Number	
Fax Number	
Email address	

In which tour operator brochures are you featured?

Domestic	
SADC region	
Pan-African	
International	

What are your main markets for visitors and percentage of your market it constitutes?

Market	%
South Africa	
Portugal	
UK	
Germany	
France	
Italy	
Other (please specify)	

Which markets do you consider to be a source of growth for your company in the next five years? Please list and indicate by what percentage you expect them to grow:

Market	%
South Africa	
Portugal	
UK	
Germany	
France	
Italy	
Other (add others up to 10 markets)	

What is the major interest of the clients that visit your properties in Mozambique?

A	Sun, sand, sea		B	Diving	
C	Golf		D	Villas	
E	Honeymoon Packages		F	Sports	
G	Small Meetings		H	Incentives	
I	Cruises		J	Sailing	
K	Culture		L	Other	
Please specify other					

Which destinations do you consider to be the main competitors to Mozambique? Please list in order of priority and indicate why?

	DESTINATION	COMPETITIVE ADVANTAGE
1		
2		
3		
4		
5		

How would you rate Mozambique in the following categories?

	Excellent	Very Good	Good	Fair	Poor
Tourism Accommodation					
Service quality at hotels					
Service quality at other establishments					
Car rental					
Golf					
Beaches					
Water Sports					
Infrastructure					
Airline connections					
Other Attractions					

What feedback do you get from your clients in Mozambique? Would you consider that they are:

	YES	NO
Exceptionally satisfied		
Very satisfied		
Satisfied		
Fairly satisfied		
Not satisfied		
What do they note as their main area of satisfaction?		
What do they note as their main area of dissatisfaction?		

How do you rate the support received by the Mozambique Promotional Offices/Embassies in overseas markets?

Excellent		Very Good		Good		Fair		Poor	
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What are the key strengths of Mozambique as a tourism destination, in order of priority?

1	
2	
3	
4	
5	

Please identify any weaknesses, in order of priority, you may have observed in the Mozambique tourism product.

1	
2	
3	
4	
5	

What actions would you like to see Mozambique undertake to strengthen its position in the its main Markets?

MARKET	RECOMMENDED ACTIONS
e.g. South Africa	

Are there any other comments that you would like to share with us?

Tourism Intelligence International would like to thank you for your comments. They are appreciated.

asoni@asatourism.com

Appendix 2 – List of Respondents

UK Tour Operators

Okavango Tours & Safaris
Dive Regal
Sunvil
Whitney Travel
Absolute Africa
Roxton Baily Robinson Worldwide
Safari Link
African Odyssey
Audley Travel
Cedarberg Travel Africa
African Pride
Africa Select
Kuoni Travel
Rainbow Tours
Nyanya Safaris
Time for Africa Safaris
Steppes Africa
Tailor Made Holidays
Cazenove & Lloyd
E-bookers
Ethos Marketing (GSA)
International Travel Destinations
Abercrombie & Kent
Cox and Kings
Africa Explorer
Worldwide Odyssey

Portuguese Tour Operators

Across Africa / Lusanova
Air Luxor
Air Portugal Tours
Andaltour
Classe/ Auchan
Club 1840
Diplomata
Dominecus
El Corte Ingles
Entremares
Escalatur
Escape Travel
Estivaltur
Fim do Mundo
Focus
Halcon
James Rawes
Longitur
Mundiclasse
Mundo VIP
Nouvelles Frontieres
Nova America
Oasis
Pacha Tours
Papa Leguas
Planeta Terra

Rotas do Vento
 Royal Viagens
 Solferias
 Soltropico
 Soltur
 Terra Africa (Terra Brasil)
 Terra Nova
 Top Atlantico
 Tropitur
 Vega

German Tour Operators

Veranstalter

Alltours
 DERTOUR
 FTI
 Gebeco Reisen
 ITS = LTU Touristic
 Ikaerus Tours
 Meiers Weltreisen
 = DERTOUR

Öger-Gruppe
 Thomas Cook
 TUI
 Studiosus

Ansprechpartner

Frau Corina Reichenbacher

Kirsten Hulvershorn

Norma Vahle
 Stefanie Fink

Frau Bunzel
 Tobias Pietrowski
 Ulrich Rosenbaum

	LIST OF RESPONDENTS		
	Name of Organization	Name of Respondent	Position of Respondent
1	Atlas Tour Operator	Jaime Mora Barroso	Managing Director
2	Mozambique Adviser	Joao Neves	Director
3	Mextur	Bashir Adam	Director-General
4	Mozaic Travel	Esme Joaquim	Director
5	Golden Travel/ Expresso Tours	Amilcar Mondlane	Tourism Consultant
6	Dana Tours	Natalie Tenzer-Silva	Director
7	Polana Hotel	David R. Ankers	General Manager
8	Avenida Hotel	Joao Cabrita	General Manager
9	FUTUR	Zacarias Sumbana	National Director
10	Holiday Inn	Paul Norman	General Manager
11	Rovuma Hotel	Arturo Esposito	Area Director of Operations
12	South African Airways	Fernao Gil de Passos	Country Manager
13	LAM	Javed Rahmat	Adviser to Board (Finance)
14	Europcar	Manuel Nunes	Country Manager
15	Hertz	Celestino Vaz	Marketing Director
16	Aquarium Tour Operator	Neima Fakir	Director
17	Imperial Car Rental	Ana Paula Gabriel	Operations and Sales Manager