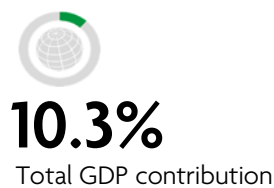


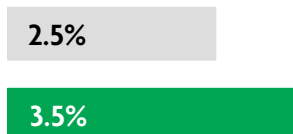
MOZAMBIQUE

2020 ANNUAL RESEARCH: KEY HIGHLIGHTS¹

GLOBAL DATA 2019



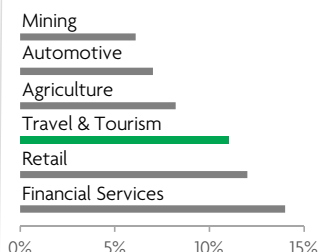
While the global economy grew by 2.5%,
Travel & Tourism grew significantly more at 3.5%



1 in 4 net new jobs were created by Travel & Tourism over the last five years



Global GDP impact by sector (2018 data). Share of total economy GDP



MOZAMBIQUE 2019 KEY DATA



CONTRIBUTION OF TRAVEL & TOURISM TO GDP

6.6% OF TOTAL ECONOMY

Total T&T GDP = MZN59.7BN (USD954.1MN)

-6.5%

2019 Travel & Tourism GDP growth vs **+2.2%** real economy GDP growth



CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT

667.6 JOBS (000's)

(6.7% of total employment)

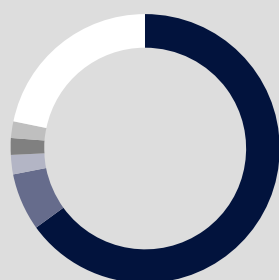


INTERNATIONAL VISITOR IMPACT

MZN15.3_{BN}

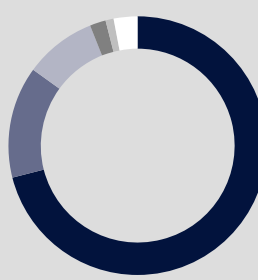
in visitor spend (**4.6%** of total exports) (USD244.9MN)

INBOUND ARRIVALS



- 1. SOUTH AFRICA **65%**
- 2. ZIMBABWE **7%**
- 3. UNITED STATES **2%**
- 4. PORTUGAL **2%**
- 5. UNITED KINGDOM **2%**
- REST OF WORLD **22%**

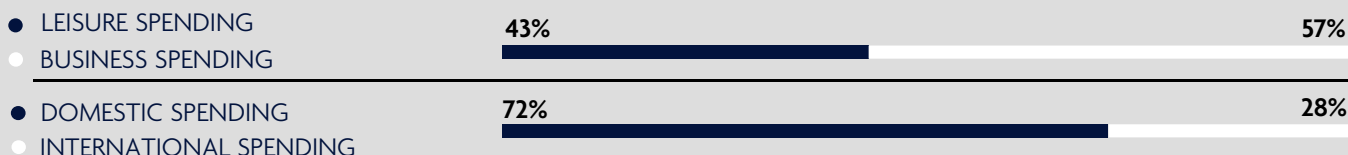
OUTBOUND DEPARTURES



- 1. SOUTH AFRICA **71%**
- 2. MALAWI **14%**
- 3. ZIMBABWE **9%**
- 4. ESWATINI **2%**
- 5. TANZANIA **1%**
- REST OF WORLD **3%**

Note: Data are average shares over the 2016-2018 period
Source: Oxford Economics, national sources and UNWTO

SECTOR CHARACTERISTICS (2019)



¹All values are in constant 2019 prices & exchange rates
As reported in March 2020