MOZAMBIQUE
2020 ANNUAL RESEARCH: KEY HIGHLIGHTS

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

<table>
<thead>
<tr>
<th>Sector</th>
<th>Share of GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mining</td>
<td>0%</td>
</tr>
<tr>
<td>Automotive</td>
<td>5%</td>
</tr>
<tr>
<td>Agriculture</td>
<td>10%</td>
</tr>
<tr>
<td>Travel &amp; Tourism</td>
<td>15%</td>
</tr>
<tr>
<td>Retail</td>
<td>5%</td>
</tr>
<tr>
<td>Financial Services</td>
<td>10%</td>
</tr>
</tbody>
</table>

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

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

MZN15.3BN
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)

<table>
<thead>
<tr>
<th>Spending Type</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leisure Spending</td>
<td>43%</td>
</tr>
<tr>
<td>Business Spending</td>
<td>57%</td>
</tr>
<tr>
<td>Domestic Spending</td>
<td>72%</td>
</tr>
<tr>
<td>International Spending</td>
<td>28%</td>
</tr>
</tbody>
</table>

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