



UNLOCKING THE MOZAMBIQUE MARKET

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



SOUTH AFRICAN TOURISM



SAT MPIF Primary Source Markets

Secondary Markets: Angola; DRC; Ghana; Tanzania; Ethiopia

Mozambique facts



POPULATION (2025 est.)
35.63-million

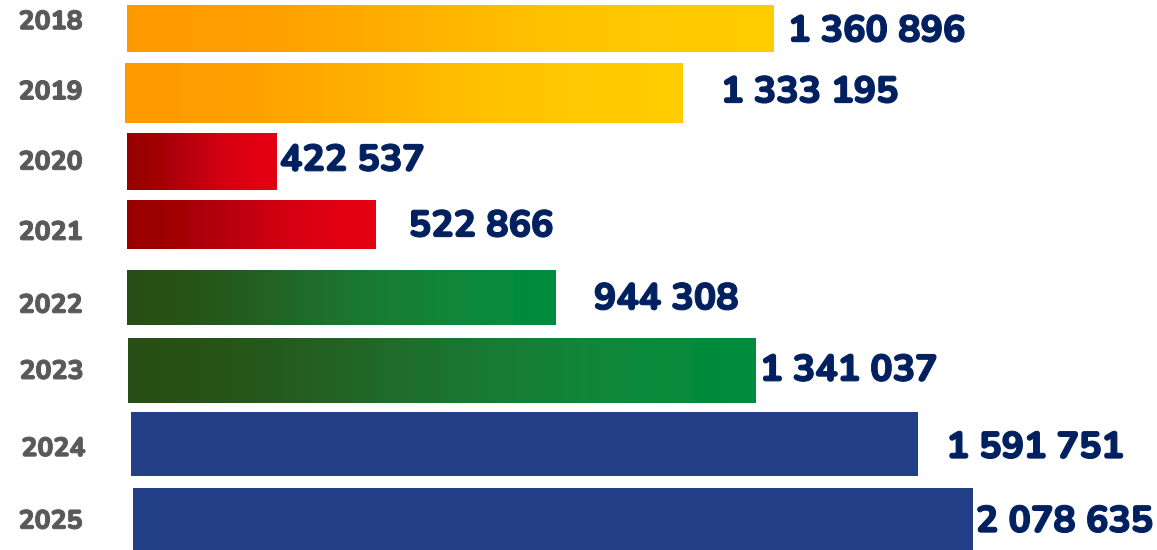
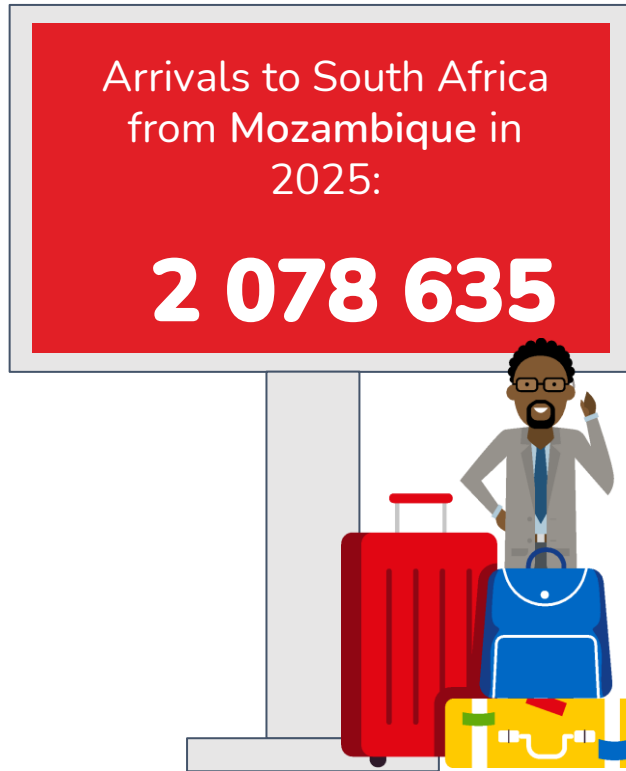


98 % of arrivals to South Africa occur by land.

Mozambique's outbound travel for 2024 is estimated at **2.60 million**. South Africa has a Market Share of **81%**.

Sources: Statssa International Arrivals, SAT Departure Survey 2024, Oxford Economics, Home Affairs

Mozambique travel trends



Growth Rate (2024 vs 2025): 31%

In 2025, total foreign direct spend from the Mozambique source market amounted to **R5,6 billion**, a year-on-year increase of 3.5%. The average spend per visitor decreased by 20%, dropping to **R2,800**.

Profile of Mozambique arrivals



Purpose of visit: **VFR** and **holiday**, as well as **personal shopping**.



Length of stay: **12.0** days



Mpumalanga is the **#1** destination, followed by the **Gauteng**.



Mostly travel **alone**.



Most likely to be **female**.



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

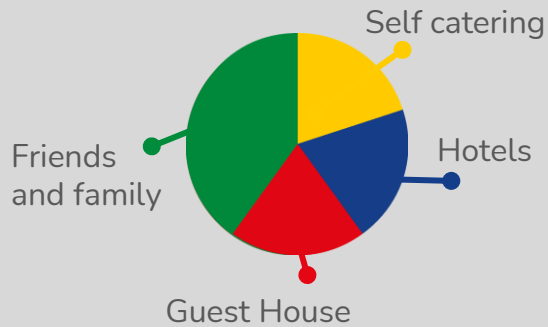
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Mostly **18 to 30**, and age brackets.

± R2 800

On average, they spend **R2 800 per tourist**

Where do Mozambican travellers mostly stay?



Mozambican's preferred activities



Shopping

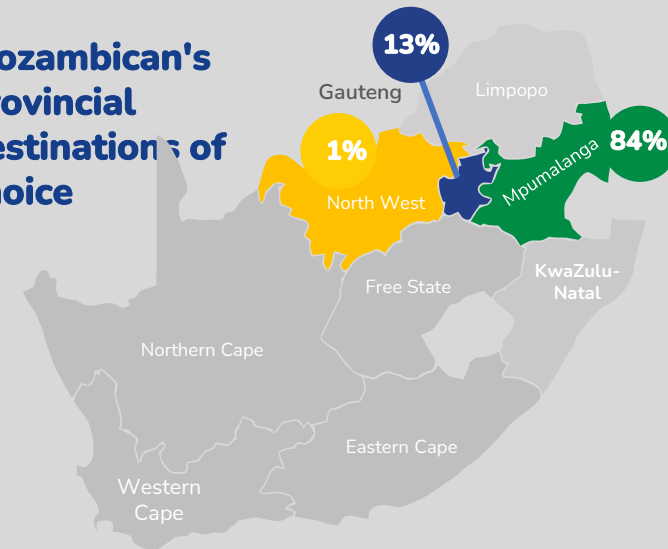
Eating out

Socialising

Mozambican's preferred attractions

Eastgate Mall
V&A Waterfront
Sandton City/ Mandela Square

Mozambican's provincial destination of choice



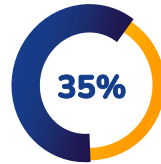
How Mozambicans first became aware of South Africa (Top 3)

- Recommended by a friend/colleague/family member
- Visited a friend/family member who stays in South Africa
- Had previously visited South Africa for business

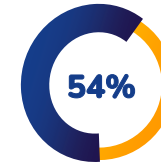


41% recall seeing advertisements about South Africa

How they plan and finalise trips to SA



35% Start planning about the destination 1 to 2 months before the trip.



54% finalise their trip to the destination Less than a month before the trip.



Reasons for Visiting South Africa for Leisure

- Value for money
- Beautiful scenery
- Experience a different culture
- Wildlife
- Welcoming people



Reasons for Visiting South Africa for Leisure

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

South Africa's Top 4 Competitors in Mozambique



Tanzania



Mauritius



Botswana



UAE

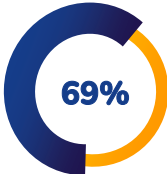


South Africa is Mozambique's #1 market for offering a wildlife experience

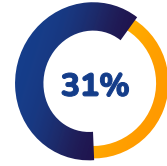


South Africa is Mozambique's #1 for having welcoming people you can interact with

Role of Media Channels



69% rely on **Friends/family** when selecting a destination



31% use **Friends/family** to make their travel bookings



Channels used when researching a trip (Top 5)



69%
Friends/family



35%
Travel agent/tour operators



24%
Travel review websites



16%
Online news, articles, blogs, etc.



49%
Social media/ instant messaging services

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



42%
Website of the airline/hotel



26%
Social media/ instant messaging services



31%
Friends/family



29%
Travel agent/tour operators

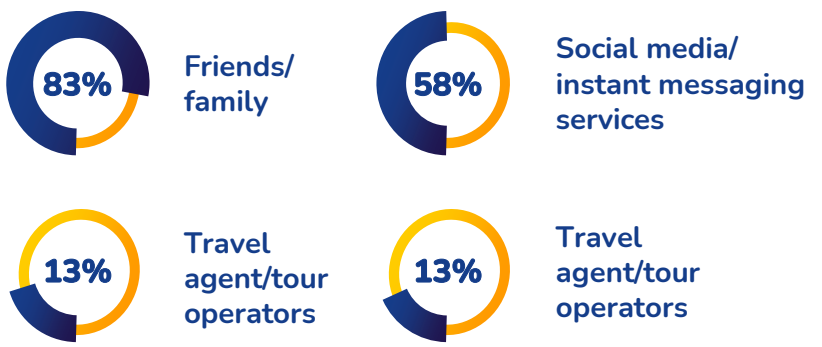


21%
Website of the airline/hotel

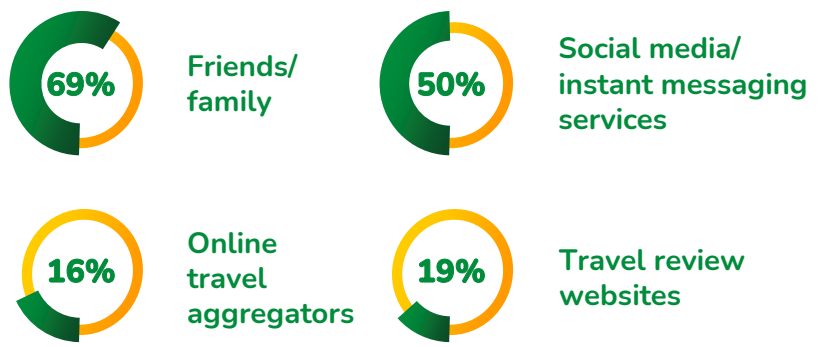
Role of Media Channels



Channels used to share details of holiday experiences during trips



Channels used to share holiday experiences after trips



Insights that would speak to the Mozambican market



Travel is the beat of my heart

Travel enables them to experience another side of life, to see and feel new things, and this shift in their perspective is rewarding to them



I want it all - Super-size it

They have a strong desire to learn new things, create new memories, and immerse themselves in new experiences.



Indulge Me

A holiday is a treat and they expect that the service at the destination will reflect that. They want to travel and be treated like royalty and have access to the best the destination has to offer for a memorable experience



Meaningful Connections

Travelling is a means to interact with and learn about diverse cultures and people in order to have more meaningful connections and self improvement.



I Wanna Break Free

They make time to take a break from everyday life and do something they haven't done before.



Inspiration to Explore

Being at a destination makes them want to explore new places. They want to have firsthand experiences of the places.



SOUTH AFRICAN TOURISM

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