



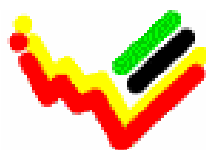
Mission Report

on Tourism statistics in Mozambique

10 November 2003 – 29 November 2003

TA for the Scandinavian Support Program to Strengthen the Institutional Capacity of the National Statistics, Mozambique

Rolf Svensson, Statistics Sweden



Instituto Nacional de Estatística

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*Rolf Svensson
Statistics Sweden
rolf.svensson@scb.se
telephone: 46 8 5069 4331*

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List of abbreviations

CO	Scanstat Coordination Office in Statistics Denmark
Danida	Danish International Development Assistance
DKK	Danish Kroner
DSt	Statistics Denmark
EUR	European Euro
INE	Instituto Nacional de Estatística, Mozambique
INE-P	Instituto Nacional de Estatística, Portugal
MZM	Mozambique Meticaís
NOK	Norwegian Kroner
Scanstat	Consortium between Statistics Denmark, Statistics Norway and Statistics Sweden
SCB	Statistics Sweden
SEK	Swedish Kronor
SSB	Statistics Norway
USD	US Dollars
ZAR	South African Rand

1 EXECUTIVE SUMMARY

The main reason for the mission was to help filling the gaps in the existing tourism statistics, particularly concerning data on tourists' expenses in Mozambique.

The mission has been divided into two parts: in the first part the emphasis was on the improvement of the contents and collection of data on tourists, while in the latter part the focus will be on enhancing the existing data collection at INE (e.g. lodging capacity, investments, and employees in the tourism sector).

During the first part of the mission, a revision of the questionnaire has been made, including the drafting of three additional questions to be filled in by foreign visitors when leaving Mozambique:

- Main destination in Mozambique (i.e. a refinement of the already existing question, making it more precise)
- Type of accommodation and nights spent
- Expenses made during the stay in Mozambique.

Another recommendation is to carry out checks now and then at the border posts regarding the handling of the forms by the staff. The purpose would be to ascertain that quality demands are being met and to encourage improvements.

2 INTRODUCTION

The consultant has been Rolf Svensson, Statistics Sweden. His counterparts have been Dr Azarias Nhanzimo and Dr Cirilo Tembe from INE, and Dr Albino Mahumane and Mr Tomé Mululana from MITUR.

No earlier missions on tourism have been made within the framework of the project.

The consultant would like to express his thanks to all officials and individuals met for the support and information which he received during his stay in Mozambique, and which facilitated the work considerably.

This report contains the views of the consultant, which do not necessarily correspond to the views of Danida or INE.

3 ACTIVITIES DURING THE MISSION

TOR fulfilled or amended

As the TOR was supposed to cover two three-weeks missions, approximately half of the tasks should have been fulfilled during this first half. This was also the case.

Description of situation

Tourism statistics are today retrieved via forms filled in by all travellers, irrespective of nationality, and collected by Migração at border posts. The same form is used for both inbound and outbound travellers. The information collected is to a great deal of purely administrative character – name of visitor, passport number, period of validity, etc. But there are also questions regarding the duration of the visit, destination, address of stay, purpose of visit and mode of travel (to and from Mozambique). The form has been elaborated in collaboration between MITUR, INE and Migração. Apparently, the involved parties are satisfied with the system.

But the information collected does not satisfy all the needs of the tourism industry and there is not sufficient information to satisfy the recommendations of WTO and the UN. For example, the tourism industry asks for more information on type of accommodation, number of nights spent at different types of accommodation, amount of money spent by foreign tourists, etc. And there are no TSA (Tourism Satellite Accounts) being made. Also, there are no specific data on investments in the tourism sector or on number of employees.

Conducted training or consultations

This first three-week part of the mission was primarily devoted to fact-finding and elaboration of the modified form. Hence, training was not on the agenda, but there were discussions with counterparts.

Shortcomings/risks (personnel situation, financial situation)

The proposal to continue with the existing form, with some additional questions, was primarily dictated by the alleged lack of resources to carry out a full survey at the most important border posts. Such a survey, recommended by WTO, gives more precise data of probably higher quality and it is easier to supervise. If, for example MITUR or some other party were to provide the financial resources needed, the consultant would definitely recommend such a solution. However, in order to run a border post survey one needs a more or less permanent group of interviewers at each border post who have to be trained and supervised. The forms have to be stored, processed, analysed and presented. It is of course cheaper to add on to an already existing survey.

There are, however, risks in such a solution. Often, there arise difficulties of various kinds when one tries to combine two surveys with different purposes into one survey. This is particularly the case when the survey is being run via a (mandatory) administrative procedure.

In this specific case, the risk of at least partial non-response is probably not negligible, particularly when further questions will be added on to a questionnaire that tourists already find cumbersome. Allegedly, they often

don't understand why they in the form have to give information that is already in their passport (the first eight questions). For example, when they reach N° 11 (address of stay), some might think, "this is nobody's business" and stop there. If, on the other hand, they are being forced to fill in all questions, the quality might be impaired. Hopefully, the pilot test will give conclusive results so a decision can be taken if the proposed cheap method is viable or not. If the result is negative, the conclusion must be that the only way to get the necessary information is via a full-fledged border survey.

Another risk might be that Migração have objections regarding the inclusion of three more questions in the questionnaire. It was not possible to get their confirmation during the first mission.

4 RECOMMENDATIONS

Form and pilot test

The existing form, elaborated in collaboration between MITUR, INE and Migração would be used as it is, but in order to get a better assessment of the tourists' main destination, choice of accommodation and expenses in the country, **three more questions** would be added (in line with WTO's recommendations).

Only **foreign visitors leaving** Mozambique would fill in the new added questions. They would also have to answer the already existing questions. For the sake of tourism statistics this would not be necessary, but Migração uses the data.

To carry this out, Migração has to change the existing form, i.e. add the new questions. To see how the new form works, a **pilot test** should be run at some important border posts (e.g. Namaacha, Maputo International) during at least three weeks. As the existing computerized system is not adapted for the new questions, storing and processing of these must be done separately. The result has to be **analysed carefully** and a common assessment of the outcome of the test be done by the involved bodies (and the consultant).

A tentative schedule for the pilot test:

Making of new form	Before Christmas 2003
Running the pilot	January 11 – January 31
Checking and validating data	First half of February
Storing of data in a computer	Second half of February
Analysis and assessment	March
Decision on changes/introduction	April

IT system

The **computerized system** that Migração has **does not work properly**. The main problem seems to be that the connection between the computers at the border posts and Migração in Maputo is erratic. When the system doesn't work, the forms have to be sent to Maputo for digitisation, entailing a delay in the processing of the data. Efforts should urgently be made to get the system up and running. Also, this would benefit the travellers when they deliver their information. The eight first questions are already available from the passport and the remaining seven (in the enlarged form) could be answered orally.

In the computerized system there is another leg consisting in the automatic transferral of visa data from embassies, consulates, etc. to Migração. This part of the system does not work either, but hopefully this problem will be sorted out soon, thus alleviating the response burden of the visitors.

Monitoring

At different intervals **checks should be carried out** to ascertain that the forms are being handled properly at the border posts. For example: the consultant passed Ressano Garcia on the 22nd of November, but there were no forms for persons at all, just for the cars. There should always be a sufficient stock of forms at each major border post, and a rule instituted of ordering new forms when there remain just x number of forms.

Urgent tasks

Summary of tasks to be carried out by Migração, MITUR and INE during December 2003 – February 2004

- Obtaining Migração's approval of the changes in the form (MITUR) and adding the new questions (Migração)
- Running a pilot with the new form at some border posts during weeks 3 through 5, 2004 (Migração)
- Storing and processing of the data (Migração, INE)
- Analysing the data, making an assessment (MITUR, Migração, INE)

Outstanding issues

Outstanding issues that will be treated during the second and final part of the mission in March 2004

- Analysis of results from the test of the new form; actions to be taken
- Employment and investments in the tourism sector
- Revenues from the tourism sector and, maybe, Tourist Satellite Accounts
- Lodging capacity by categories
- Routines for processing, analysing and presenting the results

Agenda

The following agenda is suggested for the second and final part of the mission in March 2004

- Meeting with the involved parties on the results of the pilot test with the new form
- Actions to be taken as a result of the meeting, maybe incl. elaboration of TSA with the help of someone from NA
- Investigations into the survey Alojamento... to assess the quality and regional breakdown of the data
- Proposal on routines for analysis and presentation of the results.

APPENDIX 1. Persons met

Dr. Fernando Sumbana, Minister of the Ministry of Tourism

Dr. Albino Mahumane, National director, Planning and Cooperation

Dr. Joao D. Loreiro, Presidente of INE

Dr. Azarias Nhanzimo, National director DESE

Sr. Moises Saide Combo, Border post at Namaacha

Sr. Valentin Maida Almeda, Border post at Ressano Garcia

A senior staff member at the border post at Mavalane Airport

Sr. Arlindo Mariano at National Department for Border Post Control (Immigration)

Sr. Manuel Viera, Real Estate Agent

Sr. Jose Louis Gomes de Sousa, Manager at Hotel Tivoli

Mr Paul Norman, Manager at Holiday Inn

Two staff members from the Central Bank

APPENDIX 2. List of Literature

Estatísticas Do Turismo, Ensaio Piloto, 2001, INE

Estatísticas do Turismo, paper, 2003, INE

Assunto: Estatísticas do Turismo, paper, 2003, INE

APPENDIX 3. Programme for the Mission

- Introductory meeting with the Swedish consultants and with Dr Azarias Nhanzimo, Dr Cirilo Tembe, Dr Albino Mahumane, Tome Mululane, Destina Uinge, Netercia Macuacua.
- Meeting on present statistics at INE: hotel statistics, guests, revenues, number of staff; Agenda was drawn up.
- Meeting with the Minister for Tourism, Dr Fernando Sumbana who described the need for better statistics; among other things, he emphasised the need for time series.
- Meeting with the digitising (storing of data from the forms) people at Migração, and meeting with the corresponding staff at the airport.
- Meetings with hotel managers – Tivoli and Holiday Inn – who outlined their needs for statistics on tourism.
- Meetings with staff at the border posts of Namaacha and Ressano Garcia in order to see how the forms are handled.
- Meeting with two persons from the Banco do Mozambique.
- Meeting with Presidente Loureiro.
- Workshop with representatives from MITUR, DN Migração, Banco de Mozambique and INE on tourism statistics, generally, and on the findings from the consultancy in particular. Recommendations on the proposed new variables were agreed upon.

APPENDIX 4. Terms of Reference

Terms of Reference for a short-term mission on Tourism Statistics 10 – 28 November, 2003 within the Scandinavian Assistance to Strengthen the Institutional Capacity of INE/Mozambique, 2003 – 2007

1. Background

Tourism constitutes one of the priority sectors in the Government's 5-year program. Recently, the Politics of the Tourism paper was approved and elaboration of the Strategic Plan and the revision of the legislation of the tourism is underway.

In the context of implementing the politics, the Government has taken steps to facilitate the access of tourists to the Country; the opening in 1996 of the airports in Vilanculos and in Pemba to international traffic, and the introduction of border visa by the regulation 35/2000 of November which allows visitors that do not have visa of obtaining it at the frontier at arrival.

It is desirable that regular inquiries at the frontier positions are established with the objective to collect data on tourist expenses in a form so that the revenues of tourism can be processed.

This information constitutes a fundamental element in the process of making decisions. The effectiveness, efficiency and consistence of these decisions depend heavily on the amount and quality of the information that support the process of taking decisions.

2. Objective

One of the main tasks of the Ministry of the Tourism is to give timely information about the economic development in the sector of tourism in the Country.

The main objective of the mission is to:

- Assist to create technical conditions in the institution for treatment of statistical data related to tourism.
- Assist to create technical conditions for collection and processing of data on tourists' expenses in the Country.

3. Benefactors of the mission

The mission will benefit the Ministry of the Tourism and the National Institute of Statistics (INE) through the direct participation of the Directory of Sector statistics and Business register (DESE) at INE.

4. Expected Results

The list includes also results that are likely to require an additional short-term mission in order to be achieved, see also the agenda point below.

- An exploration of the current treatment of statistical information in the statistical division in the Ministry of Tourism ending with conclusions and recommendations on concrete improvements.

- A first proposal to a system for producing statistical information on international arrivals, guests and guest nights, today processed by INE, highlighting;
 - Statistics on lodging capacity by categories, processed by the Directory of Planning and Cooperation
 - Statistics on revenues of international tourism. Start production with the consultant's support
 - Statistics on employment and investments. Start production with the consultant's support
- A proposal on how the Ministry of Tourism should develop questionnaires for regular inquiries on the tourists' expenses
- A proposal to an organisation for supervising regular expenditure surveys, taking into account such as existing law
- A first proposal on routines for processing, analysing and presenting the final results
- Proposal on timing and contents of next STA from the Scandinavian Support Program

5. Agenda for the mission

To be prepared by INE, but should include the following

- An initial meeting with all the counterparts on 10/11 to discuss ToR and to detail a plan of activities for the mission. The plan will include visits to main frontiers and to provincial directories of tourism, which have border posts
- A follow up meeting with all the counterparts to conclude what is possible to achieve in this mission and what should be incorporated in a following second short-term mission
- A seminar/workshop towards the end of the mission to present and discuss findings and recommendations

6. Consultant and Counterparts

Consultant: Rolf Svensson, Statistics Sweden

Counterparts: Mr Cirilo Tembe INE and Mr Albino Mahumane Ministry of Tourism will be the main counterparts.

Other counterparts will be Mr Azarias Nhanzimo and Jorge Chemane INE and Mr Tome Maluana Ministry of Tourism

The consultant will work at the Ministry of Tourism, in the directory of Planning and Cooperation. The consultant will report to the Director of the Planning and Cooperation.

7. Timing of the mission

The mission will take place 10/11 – 28/11, 2003

8. Finalization of the report

The consultant will prepare a draft report to be discussed with the Ministry of Tourism and INE before leaving Maputo. He will submit a final draft to INE for final comments within one week of the end of the mission. Statistics Denmark as Lead Party will print the final version within 3 weeks of the end

of the mission. The structure of the report should be according to Danida-format.

The Counterpart at INE has to ensure that the final printed report has at least a summary in Portuguese if the main report is in English – or vice versa.