

Ferenc Darabos, 2019

Volume 5 Issue 2, pp. 577-593

Date of Publication: 24th September 2019

DOI- <https://dx.doi.org/10.20319/pijss.2019.52.577593>

This paper can be cited as: Darabos, F. (2019). *The Role of Training and Management in the System of Demand-Supply in the Tourism of Mozambique*. PEOPLE: International Journal of Social Sciences, 5(2). 577-593

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THE ROLE OF TRAINING AND MANAGEMENT IN THE SYSTEM OF DEMAND-SUPPLY IN THE TOURISM OF MOZAMBIQUE

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Abstract

Nowadays with migration issues, the increasing enmity between the north and the south, the analysis of the economic catch-up of developing countries is becoming more and more relevant under the principle “think globally and act locally”. In our research this year – based on our personal relationship – we have chosen to analyse tourism in Africa, in particular, Mozambique. Our main theme focuses on the role of training and management, because we believe that among the elements necessary for an economic catch-up to achieve significant results these two elements need to be developed. Based on the number of employees in the tourism sector (271 300 people) the country occupies the 51st place in the world which is not bad compared to its contribution to the GDP. The export generated by foreign tourists from 2008 to 2017 doubled (180 million USD) but the country is behind the frontline. In our research we have analysed the importance of the demand related to tourism. First we sought answers to the questions how efficient and useful is the potential found in the current workforce compared to that of the competitors, what problems overwhelm the sector’s management and what are the barriers to development. We were also interested in how the sector’s training supports the innovation of tourism. To answer the questions above, we conducted a primary research after

carrying out an interview with the leadership of Escola Superior de Hotelaria e Turismo de Inhambane (College of Catering and Tourism of Inhambane) where we enquired about the role of training and management. This school is academically controlled by Universidade Eduardo Mondlane (University Eduardo Mondlane) located in Maputo. Besides evaluating the information gained through the interview we also analysed and compared the existing and the obtained data and information.

Keywords

Management, Employer, Demand, Tourism, Development, Mozambique

1. Introduction

The basic purpose of our research – based on our personal relationship – was to find out how tourism demand and supply is shaping in Mozambique and how management and training and re-training are taking place. The examples of the more developed and experienced countries adapted to local reality can help in the catching-up process of developing countries. To understand the demand-supply aspects of Mozambique's tourism we need to place the sector in the international environment. The development of tourism in this country shows numerous similarities as well as differences compared to the other African countries.

„Tourism development in the continent emerged in tandem with the nineteenth-century colonialism. Egypt, Morocco, Tunisia, Kenya, South Africa, Swaziland, and Zambia all experienced early development, mostly based on the desires of European and North American tourists. Africa's imagery was connected to imperial explorations and expansion, the construction of “the native,” and in the Maghreb with notions of orientalism. Up to the 1950s, tourism growth was dependent on the limited ownership of automobiles by the white “European” elite, with unreliable road networks being nonetheless promoted by automobile clubs established in the early twentieth century (Pirie 2013). From the 1930s, with the development of aviation networks from colonial centers of power in Europe, air transport became an important channel for tourism growth (Pirie 2009). However even today, air transport is perceived as a major constraint to Africa's tourism development. High airfares and inconvenient, unsafe, and insufficient service of scheduled and charter services are common problems in many countries” (Sarmiento, J., & Rink, B. 2014).

Mozambique joined the international tourism bloodstream more slowly after Portuguese colonisation (1505) than the mentioned countries (Egypt, Morocco, Tunisia). In Mozambique exploitation, later the internal political conflicts and the slightly efficient economic system

resulted in the conservation of the underdeveloped infrastructure and social relationships. The country faced a civil war from 1976 to 1992.

Tourism development was hindered by the lack of basic road traffic due to landmines whose removal officially ended only in 2015. Road-traffic safety mainly in the rainy season was poor because no public lighting was provided. The network of concrete roads financed by Chinese capital is gaining ground in the country while the construction of high standard roads is still some way off and the proportion of dirt roads is still high.

2. Methodology

This research related to tourist demand, management and training is also the first step to gradually build a university relationship and it is in parallel with another research that focuses on the tourist supply and social aspects.

In our research we sought answer to the following questions:

- Where can Mozambique`s tourist demand be placed in the international and African context?
- What are the major tourist-sending markets?
- How does the sector`s training support innovation in tourism?
- How efficiently is the labour-force potential used?

Methodologically, we carried out a secondary data analysis using the 2017 data of UNWTO World Tourism Barometer. To answer the above questions we also had an interview with the leadership of Escola Superior de Hotelaria e Turismo de Inhambane and conducted a survey with the help of a questionnaire. The interview focused on the role of training and management whereas in the questionnaire we asked people about their opinion regarding tourism management. In our research besides analysing the interview we have also evaluated and compared data with Microsoft office excel 2016 program. To make the conclusion we have created an eight-stripe swot-analysis.

3. Analysis of Tourist Demand and Supply

3.1 The International Importance of Mozambique's Tourist Supply

The overall African tourism in 2016 recorded 57 719 000 tourist arrivals, meaning 8 percent growth compared to 2015. In the ranking of the continents it comes fourth after Europe, Asia, the Pacific region, America and also overtakes the Middle East (53 755 000). It is important to notice that the growth percentage in the continent compared to 2015 was 8% and

only Asia's growth was greater with 8.6%. According to UNWTO "Tourism Highlights 2018" Africa's growth was the greatest with 9%. In 2016 according to UNWTO World Tourism Barometer report 1 639 000 tourists arrived in Mozambique implying a 5,6% growth compared to 2015. Three percent of the continent's arrivals took place in Mozambique. This change is behind that of the Sub-Saharan Africa (the rest of Africa with the exception of Morocco, Algeria, Sudan, Tunisia) with 10% growth (total of arrivals was 39 103 000). However, the growth proportion was better than the +3 percent recorded in North-Africa (18 616 000 arrivals in total). As long as we go back in time and analyse the change in the number of tourists for many years we find that in 2010 the number of arrivals was 1 718 000. In the region, with the exception of the leading MAGREB countries, the major competitors are South Africa with 10 044 000, Zimbabwe with 2 168 000 and Uganda with 1 323 000 tourists.

Analysing the account generated by the international tourism Mozambique in 2016 produced 108 million USD (-44%/ 2015: 193 million USD) lagging far behind many Sub-Saharan countries with the most humble number of tourists (total revenue of the Sub-Saharan countries is 25 694 000 USD). Africa's international account also lags behind expectations in terms of tourist arrivals placing the continent in the last position in the countries ranking (34.8 billion USD, Middle East 53.7 billion USD, Europe 447.2 billion USD). The 2015 value was 32.7 billion USD, but in 2014 it was 36.4 billion USD. In the case of Mozambique if we analyse the change of tourism efficiency in function of time we draw the conclusion that the international revenues oscillate. Therefore before plummeting in 2016 the revenue reached the all times high point in 2014 with a value of 207 million USD. In 2017 this value was 180 million USD. The first figure shows leisure and business revenue as a percentage of GDP.

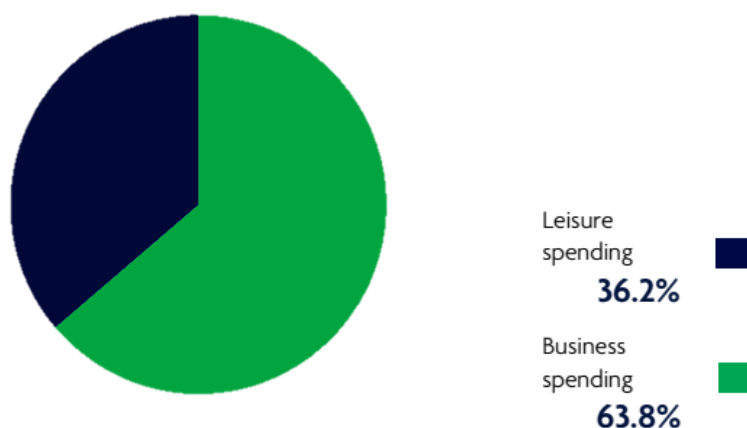


Figure 1: *Travel & tourism's contribution to GDP business vs leisure / 2017 Mozambique*

In the World Tourism Economic Impact graph by World Travel and Tourism Council we can see that the revenue from business tourists is twice as much as the revenue obtained from leisure tourism. Economically business tourism is more characteristic.

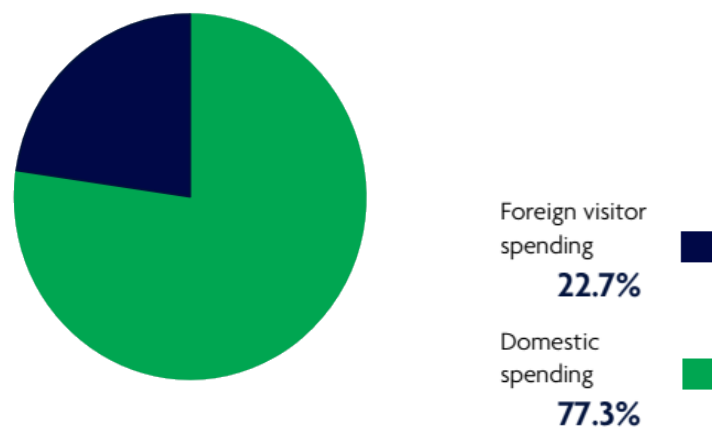


Figure 2: *Travel & tourism's contribution Domestic vs foreign / 2017 Mozambique*

In Figure 2 we can see that more than two thirds of tourists are domestic which is good in terms of structure because developed domestic tourism can serve as a good base for more demanding international tourism. However, we must say here that the enhancement of international tourism entails tremendous opportunities.

3.2 Analysis of Mozambique's Tourist Demand Comparing Different Areas

According to statistics provided by the Instituto Nacional de Estatística, Direcção de Estatísticas Sectoriais e de Empresas Maputo the average longest domestic tourist stay was recorded in Inhambane (7.7 days), followed by Sofala (2.5 days) and Maputo (1.6 days). However, foreign tourists spend more time in Maputo (4.9 days) and Inhambane follows with 3.6 days (Figure 3 shows the location of the main centres). We can see that in the category of the longest stay the demand of domestic tourists is related to more significant stay time and is mainly characterised by spending free time in adventures at the seaside.

The foreign tourists stay-time is 3 days shorter but its purpose is related to business in the capital city and only after that they visit the seaside. The country's average stay-time in 2017 was 2.2 days. This data compared to the scarce accommodation capacity of the competitors draws attention to the weakness of the country's tourism. Another problem is that the average of the hotels capacity usage is 22%. The best capacity usage was recorded in Inhambane (47.2%) and Maputo only recorded 28.5%.

The number of domestic guests (42.7%) and foreign guests (71.6%) all concentrate in Maputo. 7.6% of the domestic guests seek Inhambane while 8.9% of foreign guests visit that

province. The share of the capital city in the whole number of guests is 56.4% and Inhambane`s 8.2%.

3.3 Segmented Tourist Target-Groups and their Adequate Supply

According to The Tourism sector in Mozambique: In value Chain Analysis research by the International Finance Corporation World Bank Group and the answers obtained from the interview the following target groups can be identified in Mozambique tourism (Figure:3).

- The decisive international business tourism group leaves from Europe and arrives in Maputo.
- There are two more recent international target-groups which are attracted by adventure tourism in the south and north. The centres of this kind of tourism are: for the former, Nampula, Cuamba, Niassa reserve, Pemba Ivo and the latter, Nelspruit (South Africa), Maputo, Inhambane, Vilanculos, Bilene.
- Considering the colonial past the other route for international tourism starts in Lisbon and heads to Maputo-Vilanculos/Bazaruto Archipelagos. The international Portuguese target group visits the south region of the country for leisure.
- The next target-group consists of a group of British and international tourists leaving from London to visit Johannesburg, the continent`s tourist centre, later extending the journey to Maputo, Pemba, Quirimbas in the northern leisure destination.

The significance of the African adventure tourism is presented by Mokabe & Tshifularo in their publication. "Many studies have concluded that tourism is one of the fastest growing commercial sectors in the world, and that adventure tourism is currently one of tourism`s fastest growing categories. Adventure tourism can be domestic or international and, like all travel, must include an overnight stay but not last longer than a year (Perdomo, 2014). A report by the (Adventure Travel Trade Association, 2013) indicates that, as global tourism grows and tourists seek new experiences and destinations for new adventurous activities, the adventure market continues to expand. The report further indicates that the value of the outbound adventure travel market for American and European tourists is estimated at \$263 billion. It is interesting to note that most of the outbound adventure tourism takes place in Africa"(Mokabe & Tshifularo 2018).

3.4 Inventory of Attractions

The country's general attractions are as follows:

- Unique Portuguese traditions, not Anglo-Saxon
- Unique and intact white-sandy 2470-kilometre coast in the Indian Ocean

- 6 national parks
- Tropical Savannah climate

The following groups show segmented supply with specific attractions by settlement centres (Figure 3).

- Maputo region: Convention Centre with a capacity of 750 people (Conference Centre)
International Airport
Tembe Elephant Park
Limpopo National Park (Linked to South African Kruger “Big game” Park)
Ponta do Ouro southern coast (dolphins, snorkel, fishing)
- Bazaruto archipelago: national Marine Park, sharks, whales, rays, dugons, tortoise, dolphins, flamingo, birdwatching, Nile crocodile mangrove woods, Tsonga folk-art, Timbala dance, pearl-fishery
- Inhambane: manta ray, whale shark, tortoise. Whale shark observation point at 22 kilometres from Inhambane in Tofo. Bilene region sailing, canoeing, windsurfing, snorkelling, paragliding and kite surfing, coral reef, snorkeling, markets, shops, restaurants, bars, open-air furniture factory (cashew trees) in Xai-Xai (on the coast between Inhambane and Maputo), Wenela tidal pool natural tunnel in the ocean, Giant rock pool.
- Quirimbas archipelagos: sea National Park demarked by World Wildlife Foundation, 31 isles (IBO isle-group), dolphins, diving, ecotourism. Pemba port, airport (with 5 flights a week from Johannesburg), coral reef diving, water sports, market with aluminium goods.
- Nampula: airport, railway, cathedral
- Niassa: Game Reserve with 10 000 elephants, endangered African wild dog, leopard, impala, safari (hunting). The most protected wild park in the world, wild animal’s transit-path to south Tanzania.

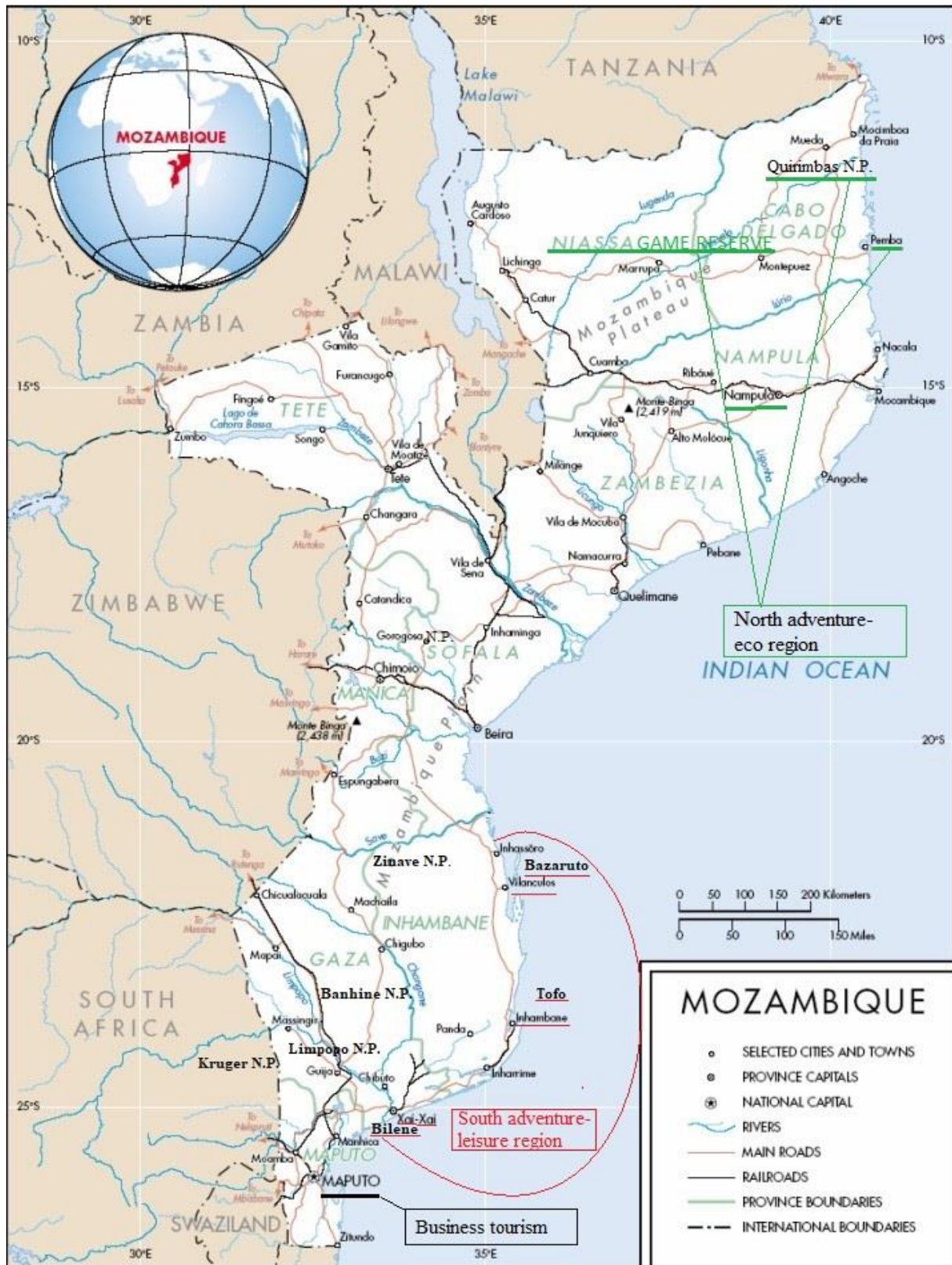


Figure 3: The Touristical Centres of Mozambique and its Most Important Product Types

3.5 A Comparative Analysis of Accommodation by Settlements

Statistics released in 2017 by Instituto Nacional de Estatística Direção de Estatísticas Sectoriais e de Empresas Maputo show that 33.7% of hotel rooms concentrate in Maputo followed by Vilanculos (Inhambane) with 11.2%. In the third place are Gaza province with Bilene, Xai-Xai and Limpopo National Park (8%), Tete province with the Zambezi river and Sofala province with the Gorongosa National Park and Beira, the country's third largest city. In international comparisons based on the data of Booking.com, the most visited accommodation search page, Mozambique in 2019 registered with 322 places of accommodation. Among the competitors Uganda registered with 1061, Kenya with 2791 and the neighbouring South Africa with 19 030 places. The white-sandy coast possessing Madagascar's neighbour to the east, Mauritius registered with 1757, Tanzania's Zanzibar with 596, Seychelles Islands to the north of Madagascar with 586 and the South African Port Elisabeth with 339. Summing up we can say that the country's registered supply cannot compete with another country's with similar natural endowments or with a prominent destination. At a national level Mozambique's differences show multiple disadvantages that significantly favour its competitors.

4. Analysis of Training and Management

In our research we analyse management in detail because the base of tourism efficiency is the adequate operation of the organisational system and its supporting professional training as well as the standards of advanced-level education.

4.1 Evaluation of the Interview Titled the Role of Training in the Tourism of Mozambique

We sent our interview questions to Escola Superior de Hotelaria e Turismo de inhambane (College of Catering and Tourism of Inhambane) by e-mail and it was answered by the leaders of the school. The interview contained the following major question-groups in Portuguese language. The introductory questions focused on the type of school training and its themes. Furthermore we were interested in whether the training helped the tourism businesses and if so in which subject areas. We also inquired about their students' qualifications and the leadership's opinion regarding how organised the local was. Ultimately we asked for development suggestions in order to improve tourism organisation.

From the interview we found out that tourism training is carried out at college level with a duration period of 4 years. This period matches the Hungarian training period extended to 4 years from 2020 after being prolonged from 3.5 years. It is forward-looking to notice that the

institution deals with tourism projects creating a live relationship with the local tourism businesses. The college manages tourism projects in the areas cited below: improvement of accommodation, catering development and provision of technical support in the development of rural tourism. The latter means planning the managerial tasks of the tourism branch.

However, the fact that the majority of the students graduated from this school do not work in tourism is awareness-raising because the respondents pointed out that the infrastructure is deficient which causes inadequate functioning of the system.

The research also showed that the institution supports the local businesses with re-training schemes. The main themes covered in the re-training are catering and hotel industry. The duration of these trainings is 1 to 5 months.

The respondents evaluated the operation of Instituto Nacional de Turismo, Mozambique's state tourism institution, on a 1 to 5 Likert Scale. The result was average 3 (average). As arguments they pointed out that the Government despite declaring tourism a strategic branch in the economic development does not create basic or special infrastructure. There are few initiatives to solve environmental-protection related problems and protect the natural and cultural heritage.

The respondents referred to the existence of a national confederation for the entrepreneurial sector but also added that there are no structural reforms that would promote creativity through financing management in order to enhance the growth of the tourism sector. Another factor they brought up was that the operation of management organisations was not flexible enough.

4.2 Evaluation of the Questionnaire Related to the Role of Management in the Tourism of Mozambique

Our questionnaire was filled out by 200 local respondents. Out of the 11 questions we are going to evaluate only those closely related to management. The rest will be evaluated in the research that focuses on the social and economic aspects of the country. As a result of the questionnaire we have drawn the conclusion that the majority of the respondents (92%) would like to learn about tourism management (Figure 4).

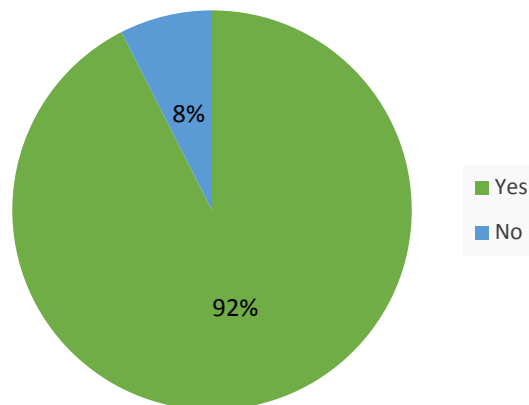


Figure 4: *The Learning Intention of the Respondents about Tourism Management*

One hundred and forty respondents 140 (70%) would like to learn English, 35 (17.5%) French, 9 (4.5%) Spanish, while 8 (4%) would learn other languages. An encouraging aspect is that the majority (83%) would work in the tourism sector (Figure 5). Fifty-five of the respondents would prefer to work in rural tourism, 46 in hotel industry, 42 in catering, 21 in facilities lending and 40 people would work in other areas.

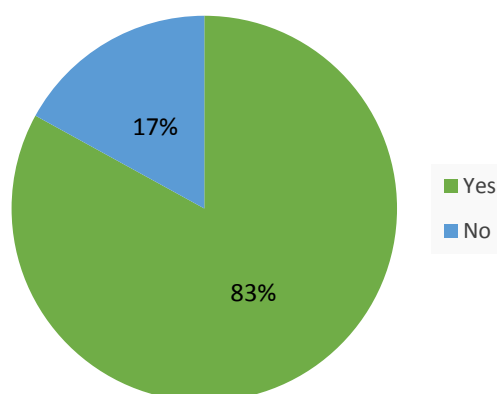


Figure 5: *The Respondents Intention of Starting up a Business in the Tourism Sector*

4.3 The Evaluation of the Activities of the Tourism Sector Staff

In our research we analysed the role of management because the base of tourism efficiency is the adequate functioning of the organisational system and it's supporting technical training as well as the standards of the higher educational system. In Mozambique half of the adults cannot read or write. 66% of women are illiterate. The country has four universities, two state universities (University Eduardo Mondlane and Pedagogic University of Maputo) and two partly owned by the state (Catholic University of Beira and Mussa Bin Bique University). The number of people employed in tourism is 271 300 and the country occupies the 51st position in

the countries ranking which compared to its contribution to the GDP is not bad. 43% of people employed in tourism, 43% work in Maputo, 9% in Gaza and 8% in Inhambane. However, the work of the employed does not yield the desired results to match the increasing volume of the international tourist revenue. The intention of tourism management in the country is to change this situation. In the 2018 ITB Tourism Exhibition in Berlin the country was represented by its independent stand showing its determination to join the tourism map of the African tourist welcoming countries.

The current air traffic situation is characterised by indispensable Turkish, Portuguese and Qatar airlines landing their planes in Maputo's Airport. To meet travel demands of the region the country already counts on organised contacts (air-links). However, border-crossing requires visa (2x30 days) which sometimes is overcharged with illegal extra fees. Cars and buses are obsolete and the regulation of public transport does not meet European standards.

The questionnaire, the interview and the analysis of the value chain in The Tourism sector in Mozambique showed that the number of staff in establishments is not enough and their training level is behind that of international standards. In establishments offering accommodation the staff efficiency is inadequate, it is over the room /2 staff capacity value. The sectors of accommodation and catering find the costs of operation and repair fees high. Moreover, the supply-determinant running water in hotels and catering establishments is corrosive.

There are no domestic supply chains so, the imported basic materials drive the supply-prices up. The vehicles of transfer service imported from South Africa which complement the work done by accommodation facilities are obsolete and of a bad quality. There is a shortage of programs-arranging professional excursion leaders and tourist guides. In some establishments services to tourists are faulty, there is no access control system, no rest area, or catering area, and there are no visitor centres, etc. The number of domestic travel agencies is small, in the offers of international packages the country only appears as complementary. As a result of this the proportion of individually organised programs is 90% which is too high and cannot be tracked. The establishment of a professional management organisation is hardly supported by the state, in addition, it is charged with significant administrative costs and tax which creates obstacles to the process. Due to historic and economic reasons the infrastructure is faulty and of inadequate standard (main roads, railway lines, airports, their domestic and international connections, public utilities, public lighting). Tourism encouraging public order and safety in the cities is not satisfactory, night life can be dangerous. At the airports the arrival of the luggage does not happen smoothly. Basically the people are friendly and they relate to

tourists positively, but a lot of theft is reported from hotels. Border-crossing, visa arrangements are slow and customs officers often regard tourists as the source of illegal funds by charging them extra fees.

Summarizing we can say that the organisation of the sector is ad-hoc with little regulation and inefficient operation. The country so far has not been able to profit from the significant South African tourist demand, on the contrary a decisive proportion of labour force and investments originate from that country.

5. SWOT Analysis of Mozambique's Tourism Management and Development Suggestions

In the next eight-stripe swot analysis we have featured the three most impacting key factors within the internal category of strengths and weaknesses. Afterwards we projected them as usual to the external category of opportunities and threats under one relevant management viewpoint (Table 1).

Table 1: SWOT analysis of Mozambique's Tourism Management

		INTERNAL FACTORS						
		STRENGTHS			WEAKNESSES			
		Unique cultural, traditional elements, friendly people wanting	Exotic flora, and fauna	Tropical, intact white-sandy coast	Infrastructure	Training	Quality control	
EXTERNAL FACTORS	OPPORTUNITIES	International standards of demand	Formation of vertical value chains, internal and external marketing	Natural reserves, functional planning of national parks, marketing	Protection of coast segments, involvement of local people in the development of tourism, marketing	Technological improvement of airports, quality accommodation, maintenance of roads and railways primarily in the north, establishment of roadside services, restoration of buildings, establishment of on-line networks	Training of hotel employees, attractions staff, excursion leaders, rural programs guides and sme	Guaranteed leisure, eco packages, organisation of more regular national and international flights, performance evaluation system, detailed statistical reporting system, behavioural code for players of irrelevant branches, systems of secure food-supply
	THREATS	Rigid state regulation	Reduction of administration and tax burdens of sme-s and travel organisers, privatisation	State support of protected zones operation	Sustainable state developments, elaboration of standards, ppp constructions, consideration of local peoples` demand of use of land	Efficient, controlled investments	State support of education, elaboration of practical academic plans, international cooperation in education	State control of imported materials, gradual elimination of visa regime, smooth border control, free competition of airlines, public safety and catastrophe plan

5.1 Main Development Suggestions Concerning the Management

In our first round of research the following development suggestions were supported. The answers obtained from the interview show that beyond the existing branches there is a demand for sustainable tourism developments. With regard to the protected areas and a conscientious attitude towards the future it is justified to develop ecotourism, especially by boosting tourism that targets rural areas (Figure 3.). When creating the necessary operational value chains the viewpoints of sustainability are to be particularly emphasised. It is essential to notice that over 60% of the population live traditionally in the rural areas and the majority of our interview respondents would live and work in rural areas. The interview also supported the need of technical support in the development of the rural tourism. In this respect the revival of nature, rural tourism, near the coastal areas is especially important. In the formation of the necessary operation chain values sustainability aspects must be particularly emphasized. An environmentally conscious behaviour on both sides, the tourists and management contributes to protect the coast and instead of mass tourism alternative, creative solutions could gain ground. „Eco-tourism is defined as responsible travelling to natural areas where the authorities are committed to conserving the environment, sustaining the well-being of the local people, and it usually involves interpretation and education (Sezgin & Gumus, 2016). Ecotourism can include both ‘cultural’ tourism or cross-cultural experiences, and nature tourism which in this case involves tourists assisting with conservation programs, a travel-learn experience, often in the process discovering how indigenous peoples are coping with modernity: a ‘soft adventure’ experience, and an experience benefiting the well-being of indigenous people, elaborate further on the nature of ecotourism as a type of tourism that does not drain resources. They argue that ecotourism is educational, adventurous, and focuses on understanding and on under-visited natural, cultural and historic areas with precise, detailed and responsible understanding and appreciation of the natural beauty and social culture of the area of interest” (Mokabe & Tshifularo 2018). In our view sustainability is the key issue. „The development of concept of ecotourism cannot be separated from the change of development paradigm, especially after the 2000s” (Prayudi, Susilo, Herastuti, 2017).

6. Conclusion

As a result of the research we have drawn the following conclusions:

- tourism performance in Mozambique lags behind that of the African front-line

- the foreign and the domestic guests first of all arrive in the capital due to business tourism but the leisure tourism is also developing with longer stay periods
- the proportion of individually organised travels is high
- tourism management is improving, but its operation is not satisfactory
- tourism supporting infrastructure has unfinished
- greater emphasis has to be placed on creating value chains
- management further training is partly carried out
- the training standard for professionals in the sector needs improving
- the participation of the university in the management of tourism projects is partial
- the university is open and proactive in extending training

The first question of our research leads us to conclude that Mozambique's tourist demand is mainly domestic however, it oscillates between local traditions and international conditions determined by its international relationships. The major tourist-source markets are Portugal and the business target-group which arrives from European countries. Further leisure target-groups arrive to the country through Johannesburg. The aim is to spread regulated tourism in which business tourism could develop complemented by a rich leisure supply that could be internationally competitive and sustainable.

The factors blocking the efficiency of the labour-force potential is the slightly motivating organisational system which does not provide the necessary infrastructural conditions. The existing labour force works slowly and with inadequate technical or network connections. The training sector of tourism considers its task cooperation in the management of this sector. Apart from 4-year trainings the training sector also organises training of shorter duration. The majority of the respondents would like to learn about tourism management.

The development of university contacts, extending the number of interviews, and making the questions more specific are the future possibilities of research. As for the global problems environmental catastrophes and the growing number of social conflicts are the limits of research.

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