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| Port Market Study: Port of Mossel Bay (PoMSB)  **Semi-structured interview guide:**  **Tourism  Key Stakeholders** | July 2025  Version 2.0 |

# Introduction

As part of the Port of Mossel Bay Market Study commissioned by Transnet National Ports Authority (TNPA), Move Beyond Consulting (MBC), in collaboration with Rebel Ports & Logistics, has been appointed to undertake a comprehensive assessment of the port's market dynamics, future demand potential, and strategic growth pathways.

A key component of this study is the **Stakeholder Engagement Plan**, which aims to foster inclusive participation, enhance collaboration, and gather critical insights from a wide range of stakeholders. These include existing and potential port users, government and regulatory bodies, industry representatives, civil society organisations, and other relevant actors in the port and logistics ecosystem.

Through structured interviews and surveys, the project team seeks to collect qualitative and quantitative data relating to:

* Port usage experiences,
* Operational and regulatory dynamics,
* Investment considerations and barriers,
* Sustainability and green transition priorities,
* Opportunities for innovation, industrial support, and market expansion.

Please see the attached Project Letter from TNPA for service context.

We are committed to ensuring that the stakeholder engagement process adheres to ethical standards. In line with this, we request your **informed consent** based on the following principles:

* **Voluntary Participation**: Your involvement in this engagement is entirely voluntary. You may withdraw your participation at any time without consequence.
* **Confidentiality and Anonymity**: All responses will be treated with strict confidentiality. Anonymity. Identifiable information will not be shared outside of the research team (MBC and Rebel), and findings will be anonymised or aggregated in all reporting.
* **Queries and Further Information**: If you have any questions or would like to follow up, please do not hesitate to contact your interviewer directly or Dr. Meena Lysko, the research team lead, at mbc.mlysko@gmail.com.

Please submit your completed form to [mbc.mlysko@gmail.com](mailto:mbc.mlysko@gmail.com?subject=PoMSB%20Survey%20Response%20for%20Offshore)

Do you agree to participate in this study?

Yes  No

Do you agree to this interview being recorded?

Yes  No

## Background information of the interviewer/s

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| **Please complete the table below before the interview** | | |
| **Question** | **Answer** | |
| Date | Click or tap to enter a date. | |
| Time |  | |
| Venue/ Format of interview |  | |
| Name of interviewer/s from the project team | Dr Meena Lysko  Ms Mpho M Monyane  Mr Rhulani Madale | Dr Henriette van Niekerk  Angelique du Toit  Johan-Paul Verschuure |

## Respondent Profile

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| **To understand the background and relevance of your organisation to this study, please provide the following general information** | | | | |
| **No.** | **Name** | **Company** | **Position/ designation** | **Involved in tourism or port-linked activities in Mossel Bay?** |
| 1 |  |  |  | Choose an item. |
| 2 |  |  |  | Choose an item. |
| 3 |  |  |  | Choose an item. |

# A. Marine Tourism activities

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| **Explores the scale, growth potential, and economic contribution of marine tourism activities linked to the Port of Mossel Bay** | |
|  | **Roughly how many tourists does your organisation currently serve annually through marine tourism activities in Mossel Bay?** |
|  | < 1,000  1,000 – 5,000  5,000 – 10,000  > 10,000  Prefer not to say |
|  | **What is your estimated annual tourist volume if port infrastructure and services were significantly improved?** |
|  | < 5,000  5,000 – 15,000  15,000 – 50,000  > 50,000  Too early to estimate |
|  | **Please provide details on the indicative optimum throughput of your intended project, based on its specific KPIs.** |
|  | Volume (e.g. tonnes/year, TEUs, energy units):  Click or tap here to enter text.  Number of port calls/year (if applicable): Click or tap here to enter text.  Other (e.g. bunkering frequency, hydrogen shipments):  Click or tap here to enter text. |
|  | **What is the average estimated spend per tourist on your services or packages (directly linked to marine tourism)?** |
|  | < R500  between R500 and R1,500  between R1,500 and R5,000  > R5,000  Not sure |
|  | **How many full-time equivalent (FTE) jobs are currently supported?** |
|  | 1 to 10  11 to 50  51 to 200  more than 200  Prefer not to say |
|  | **How many full-time equivalent (FTE) jobs could your scaled project support?** |
|  | 1 to 10  11 to 50  51 to 200  more than 200  Too early to estimate |
|  | **How many indirect jobs or business opportunities could your project support through partnerships (e.g. SMMEs, cooperatives, training)?** |
|  | 0–5  6–20  21–50  More than 50  Too early to estimate |
|  | **Mode for transport of goods to/from port?** |
|  | Road  Rail  Coastal shipping  Other (please specify): Click or tap here to enter text. |

# B. Tourism and Port Interaction

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| **This section explores how your organisation currently interacts with the port and identifies existing contributions, gaps, and constraints to tourism-related activities linked to the Port of Mossel Bay** | |
|  | **In what ways does the Port of Mossel Bay currently support or intersect with your tourism business or initiatives? (e.g. cruise passenger handling, boat tours, heritage access, marine sports, event hosting)** |
|  |  |
|  | **How would you rate the current tourism-related infrastructure or services at the port?** |
|  | Very good  Adequate  Poor  Not applicable  Please elaborate: Click or tap here to enter text. |
|  | **What improvements at the port would enhance its attractiveness or utility for tourism and leisure?** |
|  | Click or tap here to enter text. |
|  | **What improvements at the port would enhance its attractiveness or utility for tourism and leisure?** |
|  | Click or tap here to enter text. |
|  | **What is the approximate annual revenue your organisation currently earns from marine tourism activities linked to Mossel Bay?**  *(Include revenue from cruise tourism, boat tours, yacht services, shore excursions, or marine events where applicable)* |
|  | < R500,000  R500,000 – R2 million  R2 – 10 million  > R10 million  Not applicable  Prefer not to say |
|  | **How dependent is your growth plan on improved infrastructure or service delivery at the Port of Mossel Bay?** |
|  | Very dependent – growth will not occur without it  Moderately dependent – will affect scope/timing  Not dependent – plans are independent of the port  Please elaborate: Click or tap here to enter text. |
|  | **Does the effectiveness of the project rely on proximity to the Port of Mossel Bay? Please elaborate.** |
|  | Yes  No  Maybe  Please explain: Click or tap here to enter text. |

# C. Strategic Opportunities and Concerns

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| **This section seeks your perspective on the port’s role in enhancing tourism and identifies strategic focus areas for future growth.** | |
|  | **If the Port of Mossel Bay were upgraded to better support marine tourism (e.g., improved cruise berths, passenger processing, waterfront access), what would be your organisation’s estimated annual revenue from marine tourism activities over the next 5–10 years?** |
|  | < R500,000  R500,000 – R2 million  R2 – 10 million  > R10 million  Too early to estimate  Not applicable  Prefer not to say |
|  | **Do you believe the Port of Mossel Bay can serve as a catalyst for tourism growth in the region?** |
|  | Yes  No  If yes/no, please explain: |
|  | **Which demand nucleus determines the financial success or failure of the submitted/intended project?** |
|  | International  Domestic  Regional (e.g. SADC)  Local  Other (please elaborate): Click or tap here to enter text. |
|  | **What types of tourism activity would you like to see better supported by the port? (Tick all that apply)** |
|  | Cruise tourism  Marine ecotourism (e.g., whale watching, diving)  Small craft and boat tour support  Cultural and heritage tourism (e.g., Dias Museum)  Recreational waterfront/public space development  Other (please specify): Click or tap here to enter text. |
|  | **What constraints or risks do you associate with expanded port development from a tourism perspective? (e.g. visual intrusion, congestion, pollution, restricted access)** |
|  |  |
|  | **How do you anticipate marine tourism (e.g. cruise, small ship expeditions, luxury yachts) affecting vessel traffic at the Port of Mossel Bay over the next 5–10 years?** |
|  | Significant increase in vessel calls  Moderate increase  Minimal change  No impact expected  Not sure  Please elaborate: Click or tap here to enter text. |
|  | **Would your planned marine tourism activities require dedicated berth space or scheduling that could overlap with cargo operations?** |
|  | less than 5 vessels/year  between 5 and 10 vessels/year  between 11–25 vessels/year  more than 25 vessels/year  Not applicable / unknown |
|  | **Are there any indirect cargo volumes expected from tourism growth (e.g. catering supplies, craft exports, transport logistics)?** |
|  | Yes  No  If yes, please specify type and frequency of cargo movement (e.g. refrigerated food supplies, equipment, baggage handling, etc.): Click or tap here to enter text. |
|  | **What operational risks or constraints do you foresee at the port (e.g. space limitations, safety compliance, grid constraints, water)?** |
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|  | **How can port and tourism stakeholders collaborate more effectively to unlock regional value?** |
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|  | **From your perspective, what makes PoMSB an attractive/less attractive location for marine tourism?** |
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# D. Sustainability and Environmental Considerations

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| **This section explores the importance of environmental protection, sustainability practices, and heritage conservation as part of future port-tourism development strategies.** | |
|  | **How important are sustainability and environmental protection in your view of Mossel Bay’s tourism development?** |
|  | Very important  Important  Neutral  Not important  Please elaborate: |
|  | **Are there specific environmental or heritage risks you believe must be addressed in port development plans?**  *(e.g. visual impact, biodiversity disturbance, pollution, cultural site degradation)* |
|  |  |
|  | **Would you support green infrastructure or clean energy investments at the port if they align with tourism values?**  *(e.g. solar power, electric shuttles, low-emission vessels)* |
|  | Yes  No  Please explain: Click or tap here to enter text. |
|  | **Does your organisation currently incur costs related to environmental compliance or mitigation linked to marine tourism (e.g. waste management, fuel standards, emissions, noise reduction)?** |
|  | Yes  No  Not applicable  If Yes, please estimate the average annual cost:  less than R50,000    Between R50,000 and R250,000    More than R250,000    Prefer not to say |
|  | **Does your organisation generate revenue from eco-tourism or low-impact activities (e.g., whale watching, environmental education, nature conservation tours)?** |
|  | Yes  No  Not currently, but planning to  If Yes, please estimate the average annual revenue:  less than R500,000    Between R500,000 and R2 million    More than R2 million    Prefer not to say |
|  | **Are there any limitations in draft, quay length, vessel size, or landside storage that constrain or may constrain your operations?** |
|  |  |
|  | **How do you assess the port's current pricing structure (tariffs, handling fees, marine charges)?** |
|  |  |
|  | **What would influence you to switch marine tourism services to Mossel Bay from another port?** |
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|  | **Do you have any recommendations for improving the implementation and stakeholder interface processes at PoMSB?** |
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# E. Opportunities and Recommendations

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| **This section collects your ideas for improving port-tourism collaboration, unlocking economic benefits, and supporting pilot projects or public-private initiatives.** | |
|  | **What are your top recommendations for making the Port of Mossel Bay more tourism-friendly?** |
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|  | **Are there any tourism-related pilot initiatives or events you would consider testing in collaboration with the Port of Mossel Bay and TNPA?** |
|  |  |
|  | **Would your tourism investment or initiative create opportunities for local SMMEs, job creation, or skills development?** |
|  |  |
|  | **Would the financial success of your project contribute to any of the following? Please explain?** |
|  | Profitability of your business  Local community upliftment  National/regional economic growth  Job creation  Local education or schools  Skills development or training  Other: Click or tap here to enter text. |
|  | **Which sectors or communities beyond your business would benefit from increased marine tourism at Mossel Bay?** |
|  | Local SMMEs (crafts, transport, food)  Hospitality (accommodation, restaurants)  Conservation/heritage institutions  Other: Click or tap here to enter text. |
|  | **Are there international partners, financiers, or offtakers already linked to your project?** |
|  | Yes  If yes, please briefly describe the nature of the relationship (e.g. offtake agreement, equity investment, joint venture, technical advisory)  Click or tap here to enter text.  No |
|  | **Are there institutional investors, DFIs, or OEMs you typically work with to scale your business?** |
|  |  |
|  | **Would your organisation consider co-investing in port-adjacent tourism infrastructure (e.g., cruise terminal, waterfront facilities, tour staging areas)?** |
|  | Yes  No  Maybe  If yes or maybe, what types of facilities or partnerships would you consider?  Click or tap here to enter text. |
|  | **If known, what is the indicative capital investment your organisation could commit to tourism-linked infrastructure at Mossel Bay?** |
|  | Less than R5 million  Between R5 million and R20 million  Between R20 million and R50 million  More than R50 million  Not yet known  Prefer not to say |
|  | **How is your organisation currently navigating regulatory or safety uncertainty** (e.g. internal guidelines, external consultants, international benchmarks)? |
|  | Click or tap here to enter text. |
|  | **How does your business contribute towards green energy practices and decarbonisation?** |
|  | Click or tap here to enter text. |
|  | **Would you be willing to participate in a follow-up interview or stakeholder roundtable?** |
|  | Yes  No  Will delegate to someone else  If delegating, please provide contact information  Name: Click or tap here to enter text.  Contact email: Click or tap here to enter text.  Contact number: Click or tap here to enter text. |

Please submit your completed form to [mbc.mlysko@gmail.com](mailto:mbc.mlysko@gmail.com?subject=PoMSB%20Survey%20Response%20for%20Offshore)