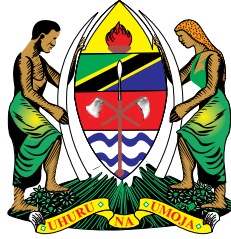


THE 2013 INTERNATIONAL VISITORS' EXIT SURVEY REPORT



THE TANZANIA TOURISM SECTOR SURVEY



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MARCH 2015

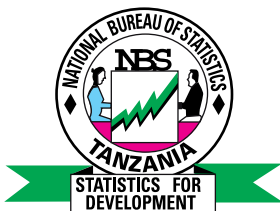


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ACRONYMS

AAKIA	Abeid Amani Karume International Airport
BOT	Bank of Tanzania
BRICS	Brazil, Russia, India, China and South Africa
DCC	Dar es Salaam City Council
HAT	Hotel Association of Tanzania
JNIA	Julius Nyerere International Airport
KAS	Kasumulo
KIA	Kilimanjaro International Airport
LGAs	Local Government Authorities
MANY	Manyovu
MFAIC	Ministry of Foreign Affairs and International Cooperation
MNRT	Ministry of Natural Resources and Tourism
MoT	Ministry of Transport
MoW	Ministry of Works
MTU	Mtukula
NAM	Namanga
NBS	National Bureau of Statistics
TAA	Tanzania Airport Authority
TANAPA	Tanzania National Parks Authority
TCT	Tourism Confederation of Tanzania
TIC	Tanzania Investment Centre
TTB	Tanzania Tourist Board
TUN	Tunduma
UNWTO	United Nations World Tourism Organization
URT	United Republic of Tanzania
VFR	Visiting Friends and Relatives
ZATI	Zanzibar Association of Tourism Investors
ZCT	Zanzibar Commission for Tourism

FOREWORD

Tourism, which accounts for about 24.0 percent of Tanzania's exports of goods and services, has recorded an improved performance in recent years. This is evidenced by the increase in the number of international tourist arrivals by 1.7 percent to 1,095,885 in 2013 from 1,077,058 recorded in 2012. This performance is largely attributed to the ongoing macroeconomic reforms and enhanced promotional efforts. As a result, tourism earnings increased by 8.2 percent to USD 1,853.28 million in 2013 from USD 1,712.7 million recorded in 2012.

In view of the foregoing, we are glad to introduce the 2013 Tanzania Tourism Sector Survey (TTSS) Report produced by the multi-institutional committee comprising the Ministry of Natural Resources and Tourism (MNRT), Bank of Tanzania (BOT), National Bureau of Statistics (NBS), Immigration Department and the Zanzibar Commission for Tourism (ZCT).

The 2013 survey's results indicate that there has been an improved performance of the tourism industry, evidenced by a significant increase in earnings from international visitors. Most of the visitors were impressed by Tanzania as one of the unique destinations with friendly people and wonderful scenery. However, the majority of visitors indicated the need for further improvement of the infrastructure particularly roads within the national parks, and the quality of services in some of the hotels. It is expected that this report will be a useful source of information to policy makers, investors, academicians and other stakeholders.



Hon. Lazaro Nyalandu (MP)

Minister

Ministry of Natural Resources and Tourism



Prof. Benno Ndulu

Governor

Bank of Tanzania

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The Steering Committee of the Tanzania Tourism Sector Survey (TTSS) Project wishes to convey heartfelt thanks and appreciation to all those who were behind the successful completion of the 2013 International Visitors' Exit Survey. Special appreciation should go to the Chief Executive Officers of the participating institutions namely; the Ministry of Natural Resources and Tourism, Bank of Tanzania, National Bureau of Statistics, Immigration Department, Zanzibar Commission for Tourism and the Tourism Confederation of Tanzania, for their valuable support and guidance.

Special recognition should also go to the Immigration Department staff, particularly the officers' in-charge at the Julius Nyerere International Airport, Abeid Amani Karume International Airport, Kilimanjaro International Airport, Namanga, Tunduma, Mtukula and Manyovu border points. Likewise, our profound thanks should go to researchers and those who handled the data entry exercise for making the survey a success.

This report was prepared under the overall supervision of Mr. Z. A. Kimwaga (Director of Tourism – MNRT) and Dr. J. L. Masawe (Director, Economic Research and Policy-BOT). The Technical Team was led by Mr. P. Mwiru, Assistant Director of Tourism (MNRT), in collaboration with Ms. N. Moshy, Manager, International Economics and Trade Department (BOT). Other members of the team were Dr. C. Masenya (BOT), Mrs. V. W. Kejo (BOT), Mr. P. Mboya (BOT), Mr. J. Msimbano (MNRT), Mr. V. Tesha (NBS), Ms. E. Lema (NBS), Mrs. J. Rugemalila (NBS), Mr. C. Mndeme (Immigration Department) and Mr. M. Jaffer (ZCT). Special thanks should also go to Mr. R. Barongo and R. William from BOT for managing the data processing exercise.

EXECUTIVE SUMMARY

The World Tourism Barometer (2014) shows that during 2013, the tourism sector at the global level showed remarkable growth despite the slowdown in economic activities and geopolitical challenges. The region that recorded the strongest growth was Asia and the Pacific which registered a growth of 6.0 percent. Africa registered a growth of 5.6 percent reaching a record of 55 million tourists. In terms of receipts, Europe maintained a lion's share as it accounted for about 42 percent of the global tourism receipts. Within East Africa, the number of international tourist arrivals in Kenya declined to 1,519,600 in 2013 from 1,710,829 recorded in 2012 largely associated with insecurity in the country. On the other hand, the number of international tourist arrivals in Uganda increased to 1,206,000 in 2013 from 1,197,000 registered in 2012, while in Tanzania it grew by 1.7 percent reaching 1,095,885 and in Rwanda it grew by 6.0 percent to 1,137,000.

This report presents the findings of the 11th international visitors' exit survey, which was also the 4th comprehensive survey that is normally conducted after every five years to cover high and low tourist seasons. High season lies between July and September, while the low season lies between March and May.

Main findings

Source Markets

The survey's findings show that the top 15 source markets for Tanzania is largely similar to the comprehensive survey conducted in 2007. Kenya and Uganda are among the countries in the list of top 15 source markets largely associated with the ongoing regional integration initiatives under the East African Community. India has also featured as a prominent source market for Tanzania, reflecting increased promotional efforts with a view to decrease overdependence on the traditional markets of Europe and America.

Visitors' Expenditure

Tourism earnings for Tanzania increased by 8.2 percent to USD 1,853.3 million in 2013 compared with USD 1,712.7 million reported in 2012. For Zanzibar, earnings from tourism increased by 11.6 percent to USD 210.5 million compared with USD 175.4 million earned in 2012. The overall average expenditure per person per night was USD 284 slightly lower than USD 290 recorded in 2012. This implies that the growth in tourism earnings during 2013 largely emanated from increase in the number of international tourist arrivals. Visitors who came under the package tour arrangement spent an average of USD 372 per person per night while those under the non-package tour spent an average of USD 201 per person per night.

Purpose of Visit

Leisure and holidays continued to be the main purpose of visit for international tourists to Tanzania, followed by visiting friends and relatives; business and meetings and conferences. Only a few visitors came as volunteers and for scientific and academic purposes. The dominance of leisure and holidays is largely attributed to the country's unique nature and wide range of tourist attractions.

Length of Stay

The survey's results show that most visitors spent between eight and 28 nights in Tanzania. The results reveal further that no visitors spent more than three months. The average length of stay was 10 nights, with visitors from Germany and Canada staying the longest – at the average of 13 nights. Visitors from the neighboring countries stayed fewer nights.

Tourism Activities

Wildlife tourism continued to be the most attractive tourism activity in 2013, which is consistent with the country's wildlife endowment. The majority of tourists who visited wildlife attractions came from the United States of America, the United Kingdom and France. The second most attractive activity was beach tourism, which mainly attracted visitors

from Italy, the United Kingdom and France. The least attractive activity was hunting, which attracted visitors mostly from the United States of America, Kenya and the United Kingdom.

First-Time and Repeat Visits

The share of first-time visitors to total visitors declined from 77.0 percent in 2012 to 66.0 percent in 2013. This implies that the share of repeat visitors is increasing, indicating that visitors were satisfied with the services received in the past and the tourist attractions available in the country.

Mode of Payment

The survey's findings indicate that 89.8 percent of the visitors settled their bills by cash. The majority of visitors who used cash as a mode of payment were those who came for leisure and holidays. Only 9.3 percent of the visitors were able to pay through credit cards. Unacceptability of credit cards at most tourism establishments has been an issue of concern to visitors. It needs to be addressed in order to induce visitors to stay longer and spend more.

Policy Recommendations

- a) The survey's findings revealed that the majority of visitors used cash as a mode of payment while few used credit cards. The small number of visitors using credit cards support raised concerns about the unacceptability of this facility by most tourism establishments. Therefore, the Government through the national Public-Private Partnership (PPP) policy should sensitize and encourage business community to accept the use of credit cards.
- b) The survey's results indicate that the overall average length of stay of visitors to the United Republic of Tanzania was 10 nights, which is similar to the number reported in 2012 and 2011. This implies that there is a need of enhancing diversification of tourism products in order to increase the number of nights spent at a destination by tourists. This will have a positive impact on tourist expenditure in the country.

- c) The survey's findings revealed that only one percent of the visitors heard about Tanzania's tourist attractions through trade fairs and Tanzania's missions abroad. This implies that the government and private sector should enhance promotional efforts and even use other sources of information such as television, web, newspapers and magazines. Tanzania's missions abroad should spearhead the implementation of economic diplomacy in order to attract more tourists.

- d) Further, the survey's findings showed that wildlife tourism continued to be the leading activity in 2013, in spite of the country's endowment with a wide range of other tourist attractions such as sandy beaches, historical sites, mountains, nature and landscapes. This implies that more concerted efforts should be undertaken to promote other forms of tourist attractions to complement wildlife tourism.

- e) The findings also indicate that more than a half of the visitors raised concerns regarding the improvement of the infrastructure and other facilities, such as roads within the national parks, toilets, water supply and air conditioners at the airports and signage. The government is therefore urged to continue with its efforts to improve roads in the national parks and other facilities.

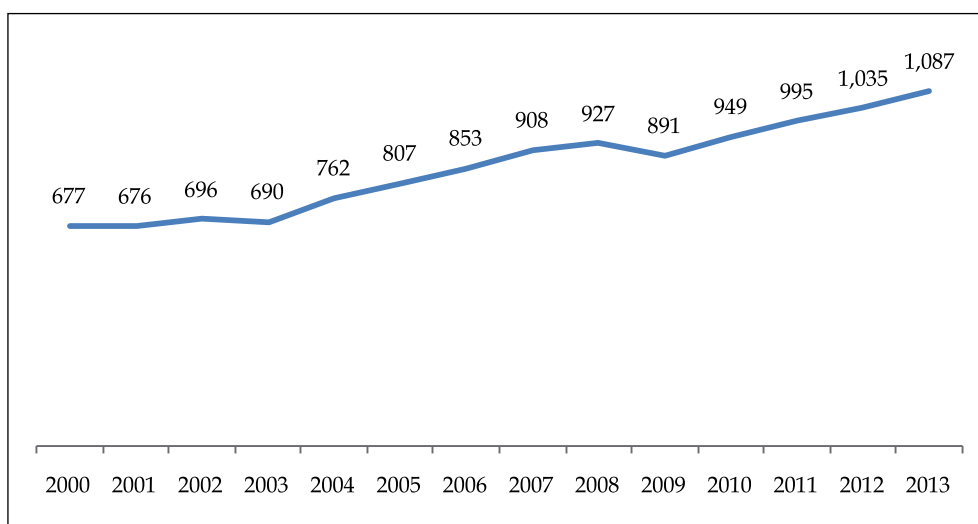
- f) Traffic jam in Dar es Salaam region was another major concern for most tourists. The government is advised to continue with its efforts to address the infrastructural issues.

Chapter 1: Recent Developments in the Tourism Industry

1.1 Global Perspective

The tourism sector has shown a remarkable growth despite the slowdown in global economic activities and the geopolitical challenges. According to the UNWTO World Tourism Barometer, January 2014, international tourist arrivals grew by 5.0 percent in 2013, reaching a record of 1,087 million arrivals (**Chart 1.1**).

**Chart 1.1: International Tourist Arrivals, 2000 - 2013
In Millions**



Source: UNWTO World Tourism Organization Barometer, January 2014

Region-wise, growth was strongest in **Asia** and the **Pacific**, where the number of international tourists grew by 6.0 percent and reached 248 million (**Table 1.1**). South-East Asia sub-region was the best performer with a growth rate of 10.0 percent, while a comparatively more moderate growth was recorded in South Asia (5.0 percent), Oceania and North-East Asia (4.0 percent each). **Africa** attracted a 5.6 percent increase in arrivals, reaching a new record of 56 million, which reflected the ongoing rebound in North Africa and the sustained growth in Sub-Saharan destinations. **Europe** recorded a 5.4 percent increase in international tourist arrivals in 2013, raising the total to 563 million. The **Americas** recorded an increase of

3.6 percent, reaching a total of 169 million in 2013. The leading destinations in the Americas were North and Central America, with a growth rate of 4.0 percent each, while South America and the Caribbean registered a slowdown of 2.0 percent and 1.0 percent, respectively. This performance is low compared to the levels recorded in 2012. The **Middle East** continued to attract low level of international tourist arrivals, recording a growth rate of about 0.2 percent.

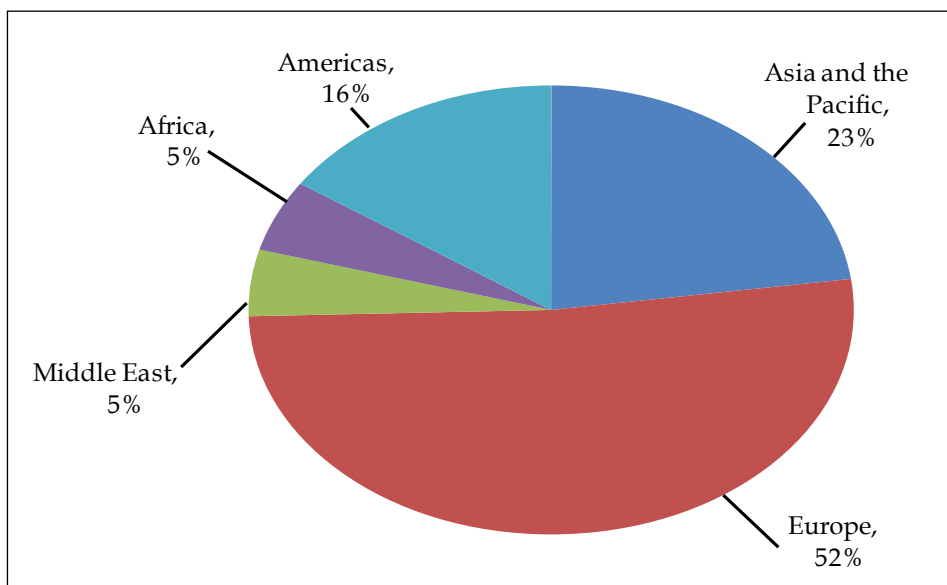
**Table 1.1: International Tourist Arrivals by Regions, 2006-2013
In Millions**

Region	2006	2007	2008	2009	2010	2011	2012	2013
Europe	461	488	489	461	485	516	534	563
Asia and the Pacific	167	185	188	181	205	219	234	248
Americas	136	143	148	141	151	156	163	169
Africa	39	45	47	47	50	50	53	56
Middle East	40	48	53	52	58	55	52	52
Percentage Change								
Europe	5.0	5.9	0.1	-5.6	5.2	6.4	3.4	5.4
Asia and the Pacific	8.4	11.3	1.4	-3.7	13.3	6.6	6.9	6.0
Americas	1.8	5.0	3.6	-4.7	7.0	3.6	4.5	3.6
Africa	11.0	14.3	4.5	-0.4	6.9	-0.4	6.8	5.6
Middle East	8.9	20.2	11.4	-1.7	11.9	-6.0	-5.3	0.2

Source: UNWTO World Tourism Organization Barometer, Various Issues

Europe continued to account for the largest share of international tourist arrivals, followed by Asia and the Pacific, the Americas, the Middle East and Africa, as indicated in **Chart 1.2**. The same pattern was observed in 2012.

Chart 1.2: Market Share of International Tourist Arrivals, 2013



Source: UNWTO World Tourism Organization Barometer, January 2014

UNWTO projections indicate that international tourist arrivals will increase by between 4.0 and 4.5 percent in 2014, above the 3.8 percent average recorded between 2006 and 2013 (Table 1.2). The positive results of 2013, and the expected global economic improvement in 2014, set the prospect for an increase in international tourist arrivals in 2014.

Table 1.2: International Tourist Arrivals: Actual Growth and Projection

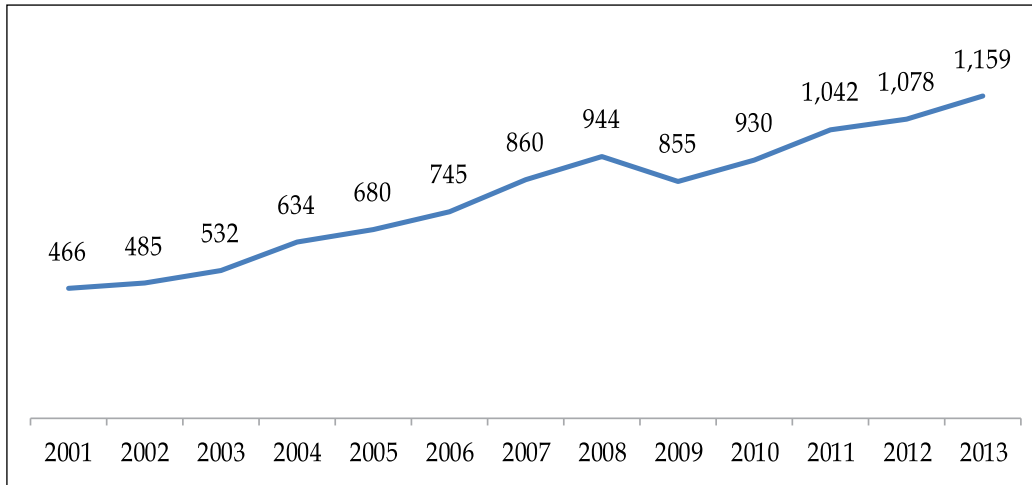
	Actual Growth (Percent)		Projection
	2013	Average 2006 -2013	2014
World	5.0	3.8	4.0 to 4.5
Europe	5.4	3.2	3.0 to 4.0
Asia and the Pacific	6.0	6.3	5.0 to 6.0
Americas	3.6	3.1	3.0 to 4.0
Africa	5.6	6.0	4.0 to 6.0
Middle East	0.3	4.9	0.0 to 5.0

Source: UNWTO World Tourism Organization Barometer, Various Issues

According to the UNWTO World Tourism Barometer of April 2014, international tourism receipts reached USD 1,159 billion in 2013 worldwide, which is an increase of 7.5 percent from USD 1,078 billion recorded in 2012 (Chart 1.3). The growth rate of receipts is consistent with

the increase in international tourist arrivals. This performance confirms the increasingly important role of the tourism sector in stimulating economic growth and contributing to international trade.

Chart 1.3: International Tourism Receipts, 2001-2013
Billions of USD



Source: UNWTO World Tourism Organization Barometer, Various Issues

Region-wise, Asia and the Pacific recorded the largest increase in international tourism receipts in 2013, followed by Europe and the Americas (**Table 1.3**). Africa and the Middle East recorded a slight fall in international tourism receipts in 2013.

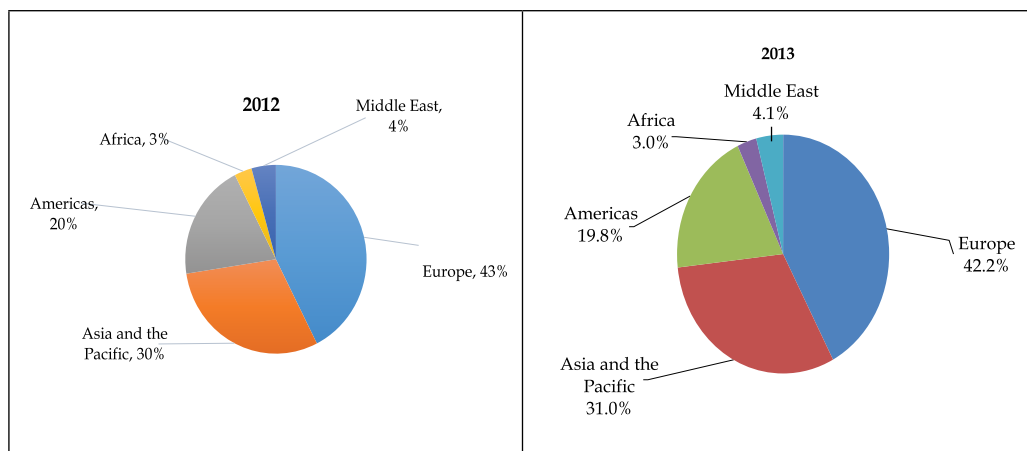
**Table 1.3: International Tourism Receipts by Region, 2006-2013
In Billions of USD**

Region	2006	2007	2008	2009	2010	2011	2012	2013
Europe	377.4	434.3	472.0	410.8	409.3	466.3	454.0	489.3
Asia and the Pacific	156.5	186.7	209.0	203.9	255.2	298.7	329.1	358.9
Americas	154.2	171.7	188.5	165.5	181.0	198.4	212.9	229.2
Africa	24.7	29.5	30.2	28.8	30.4	32.9	34.3	34.2
Middle East	29.9	35.0	39.7	41.2	51.7	46.2	47.5	47.3
Percentage Change								
Europe	8.4	15.1	8.7	-13.0	-0.4	13.9	-2.6	7.8
Asia and the Pacific	11.2	19.3	11.9	-2.5	25.2	17.0	10.2	9.1
Americas	6.6	11.3	9.8	-12.2	9.4	9.6	7.3	7.7
Africa	14.9	19.4	2.4	-4.6	5.6	8.2	4.3	-0.3
Middle East	8.3	17.1	13.4	3.8	25.5	-10.6	2.8	-0.4

Source: UNWTO World Tourism Organization Barometer, Various Issues

Europe continued to dominate by accounting for about 42.0 percent of the international tourism receipts in 2013 (**Chart 1.4**). Asia and the Pacific accounted for 31.0 percent, followed by the Americas with 19.8 percent. The share of Asia and the Pacific has been increasing over the recent past, while that of Europe has been declining. The Middle East accounted for about four percent, while Africa accounted for the lowest share of three percent.

Chart 1.4: Market Share of International Tourism Receipts, 2012-2013



Source: UNWTO World Tourism Barometer, April 2013 and April 2014

The tourism sector also generates export earnings through international passenger transport which amounted to USD 218 billion in 2013, bringing total receipts generated by international tourism to USD 1,377 billion. International tourism (travel and passenger transport) accounted for about 30.0 percent of the world's exports of services and six percent of the world's exports of goods and services. Tourism ranked fifth after fuels, chemicals, food and automotive products in world exports, while ranking first in many developing countries.

In the top ten tourism destinations by receipts, Thailand recorded the strongest growth of 19.7 percent, followed by Hongkong (China) and the United Kingdom (**Table 1.4**). The remaining destinations in the list of top ten recorded an increase of between 3.0 percent and 10.0 percent, with the exception of Australia which recorded a decline of 2.3 percent.

**Table 1.4: The Top 10 Ranking of Destinations by Receipts
In Billions of USD**

Country	2005	2006	2007	2008	2009	2010	2011	2012	2013	% Change
United States of America	82.2	85.7	96.7	110.4	94.2	103.5	115.6	126.2	139.6	9.6
Spain	48.0	51.1	57.8	61.6	53.2	52.5	60.0	56.3	60.4	6.8
France	44.0	46.3	54.2	56.6	49.5	47.0	54.8	53.7	56.1	4.3
China	29.3	33.9	37.2	40.8	39.7	45.8	48.5	50.0	51.7	3.3
Italy	35.4	38.1	42.7	45.7	40.2	38.8	43.0	41.2	43.9	6.2
Germany	29.2	32.8	36.0	39.9	34.6	34.7	38.9	38.1	41.2	7.5
United Kingdom	30.7	33.7	37.6	36.0	30.1	32.4	35.1	36.2	40.6	10.8
Hongkong (China)	10.3	11.6	13.8	15.3	16.4	22.2	28.5	33.1	38.9	14.9
Australia	16.7	17.8	22.3	24.7	25.4	28.4	31.3	31.7	31.0	-2.3
Thailand	9.6	13.4	15.6	18.2	16.1	20.1	27.2	33.8	42.1	19.7

Source: UNWTO World Tourism Barometer, Various Issues

1.2 Tourism Developments in East Africa

The number of international tourist arrivals in Kenya declined to 1,519,600 in 2013 from 1,710,829 recorded in 2012, largely due to security warnings from her traditional source markets¹. As a result of this, earnings from tourism declined to USD 1,092.0 million in 2013 from USD 1,140.0 million recorded in 2012. In Uganda, the number of international tourist arrivals

¹ Kenya National Bureau of Statistics

increased to 1,206,000 in 2013 from 1,197,000 recorded in 2012². The majority of tourist arrivals to Uganda came mainly to visit friends and relatives, followed by those who came for business and professional conferencing and then leisure, recreation and holidays. In line with this development, tourism earnings increased to USD 979.0 million in 2013, from USD 834.0 million registered in 2012. In Rwanda, the number of international tourist arrivals increased by 6.0 percent to 1,137,000 in 2013 from the level recorded in 2012³. Consistent with this development, earnings from tourism rose by 4.0 percent to USD 293.6 million in 2013.

1.3 Tourism Developments in Tanzania

Tanzania's tourism industry, which accounts for about 24.0 percent of exports of goods and services, continues to be among the key sectors in generating foreign exchange. The industry continued to grow in 2013 as exhibited by the increase in the number of international tourist arrivals to 1,095,885 from 1,077,058 recorded in 2012. As a result, tourism earnings increased by 8.2 percent to USD 1,853.28 million compared to USD 1,712.7 million recorded in 2012.

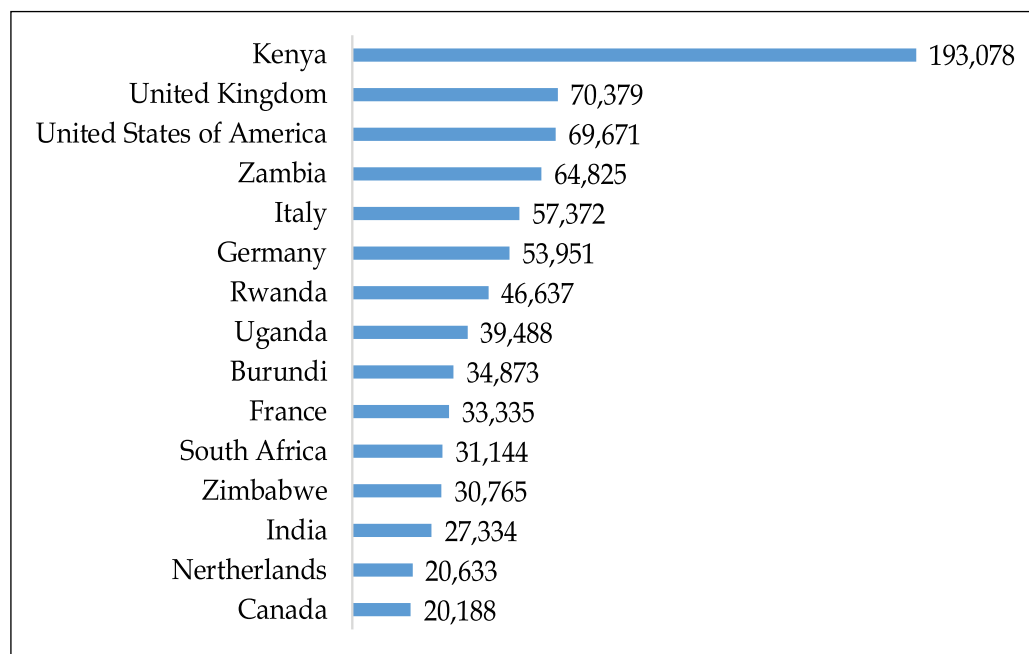
1.3.1 International Tourist Arrivals

The immigration statistics show that out of total international tourist arrivals to Tanzania, tourists from Kenya led percent, followed by those from the United Kingdom, the United States of America and Zambia (**Chart 1.5**). The appearance of other EAC partner states in the list of the major source markets for Tanzania reflects an increase in business interactions as well as movement of persons in light of the strengthening regional integration arrangements.

² Uganda Bureau of Statistics, Statistical Abstract, 2014.

³ Rwanda Development Board.

**Chart 1.5: International Tourist Arrivals to Tanzania,
Top 15 Source Markets, 2013**



Source: Immigration Department, 2013

Region-wise, Africa maintained the leading share by accounting for 47.9 percent of total international tourist arrivals in 2013 compared to 45.4 percent recorded in 2012. However, highest growth was registered for visitors from the Middle East. Negative growth was recorded for Asia and the Pacific; and America (Table 1.5).

**Table 1.5: International Tourist Arrivals to Tanzania by Regions,
2011-2013**

Region	2011	2012	2013	Growth (%) 2012-2013
America	95,503	103,064	97,624	-5.3
Africa	445,750	488,745	524,506	7.3
Europe	249,910	330,207	341,836	3.5
Middle East	15,281	21,348	23,476	10.0
Asia and the Pacific	61,550	133,694	108,443	-18.9
Total	867,994	1,077,058	1,095,885	1.7

Source: Immigration Department

During 2013, Tanzania registered a significant growth of visitors from Brazil, Russia, India and China. However, South Africa registered a negative growth (Table 1.6).

Table 1.6: International Tourist Arrivals to Tanzania from BRICS, 2012-2013

Country of residence	2012	2013	Growth (%)
Brazil	2,400	2,926	21.9
Russia	4,021	5,699	41.7
India	22,862	27,334	19.6
China	13,760	17,336	26.0
South Africa	32,701	31,144	-4.8

Source: Immigration Department

1.3.2 Promotion and Marketing

1.3.2.1 Tourism Marketing Strategy

Following the launching of Tanzania Tourism Marketing Strategy on 16th November 2012, the Tanzania Tourist Board (TTB) started to implement the strategy by collaborating with tourism stakeholders such as ambassadors and high commissioners representing their countries in Tanzania. These countries include the United Kingdom, the United States of America, Germany and Italy. The strategy was also shared with other tourism stakeholders in various regions of Tanzania. The sharing was intended to create awareness among various tourism stakeholders so that they can make a positive contribution during its implementation.

1.3.2.2 Tourism Trade Fair and Exhibitions

The Tanzania Tourist Board continued to participate in international trade fairs and exhibitions in various countries such as the United Kingdom (World Travel Market), Germany (International Tourism Bourse) and Spain (FITUR). However, TTB started an initial plan to organize another international exhibition known as SITE for the first time in Tanzania. The exhibition will take place in October 2014 at Mlimani City Dar-es-Salaam. In an effort to promote tourist attractions in Tanzania, TTB appointed goodwill ambassadors in various countries such as the United State of

America, Australia and Japan in order to complement TTB's efforts in making sure that tourist attractions are known to these countries.

1.3.2.3 Cultural Tourism Programmes

In 2013, the Tanzania Tourist Board through its Cultural Tourism Programme registered eight new Cultural Tourism Enterprises after complying with the National Cultural Tourism Guidelines of the Ministry of Natural Resources and Tourism. These include:

- Haydom Four Corners Cultural Tourism (Mbulu-Manyara region);
- Minjingu Cultural Tourism Enterprise (Manyara region);
- Tanga Cultural Tourism Initiative (Tanga region);
- Simangori Cultural Tourism Enterprise (Minjingu-Monduli-Arusha region);
- Olpopongi Cultural Tourism Enterprise (Longido-Arusha region);
- Materuni Cultural Tourism (Kilimanjaro region);
- Tembea-Mara Cultural Tourism (Bunda-Mara region); and
- Masama Cultural Tourism (Kilimanjaro region).



*Haydom Four Corners Cultural Tourism
(Mbulu-Manyara region)*



*Minjingu Cultural Tourism Enterprise
(Manyara region)*



*Tanga Cultural Tourism Initiative
(Tanga region)*



*Simangori Cultural Tourism Enterprise
(Minjingu-Monduli-Arusha region)*



*Olpoongi Cultural Tourism Enterprise
(Longido-Arusha region)*



*Materuni Cultural Tourism
(Kilimanjaro region)*

1.3.2.4 Tanzania Voted the Best Safari Destination

According to the survey conducted by an online market place for African tours, SafariBookings.com, Tanzania was voted the best safari destination in Africa. The survey, which involved 276 specialized safari operators, eight major safari countries, 139 wildlife parks and reserves, 2,324 user reviews and 756 expert reviews, concluded that Tanzania leads in the continent, by scoring an average rating of 4.8 stars out of five stars (5.0); the highest score of all eight major safari countries. Botswana and Kenya scored 4.7 stars each, followed by South Africa and Zambia which scored 4.6 stars each, Namibia 4.5 stars, Uganda 4.2 stars and Zimbabwe 4.1 stars.



Visitors in Serengeti National Parks for game viewing

The main contributing factors towards this achievements include the fact that Tanzania is the land of two of UNESCO's World Heritage Sites namely; Serengeti National Park, which is the home to the "great migration," and the Ngorongoro Crater. Other factors include; the best chimp tracking in Africa and the world-famous Mount Kilimanjaro, which is the highest free-standing mountain in Africa. Visitors can also enjoy authentic African

wilderness without paved roads and fencing, beaches in Zanzibar Island, coupled with political stability and safety.

1.3.3 Meetings and Conferences

The Africa Climate Conference 2013 was organized under the auspices of the World Climate Research Programme (WCRP) and the African Climate Policy Center (ACPC) in October, 2013. The conference brought together decision-makers and climate researchers, scientists and practitioners from Africa and around the world. The main objective of the conference was to develop a framework for mainstreaming climate information into decision-making, as well as a network of experts who evaluate and interpret knowledge for practical applications in areas such as agriculture and food production, water resources management, climate risk management and adaptation planning.

1.3.4 The Fight against Poaching

During his visit to Tanzania in July 2013, President Barrack Obama of the United States of America, stressed on the issue that is inseparable from Africa's identity and prosperity, primarily the importance of wildlife to the African economies like Tanzania. The US president particularly emphasized the need to curb poaching and trafficking, which is currently threatening Africa's wildlife. It is on this note that he signed an executive order creating a special task force aimed at preventing poaching and international wildlife trafficking, especially the sale of rhino horns and elephant tusks. The presidential order earmarked additional funds for anti-poaching and other technical assistance to African governments.



Protect the elephants from poaching

1.3.5 Tourism Development Levy

The Ministry of Natural Resources and Tourism has introduced Tourism Development Levy (TDL) by using Section 59 of the Tourism Act, No. 29 of 2008. TDL regulations were developed in 2013 to facilitate the implementation of the said Act. The principal objective of the levy is to assist in financing the implementation of the activities relating to tourism development.

1.3.6 Domestic and International Flights

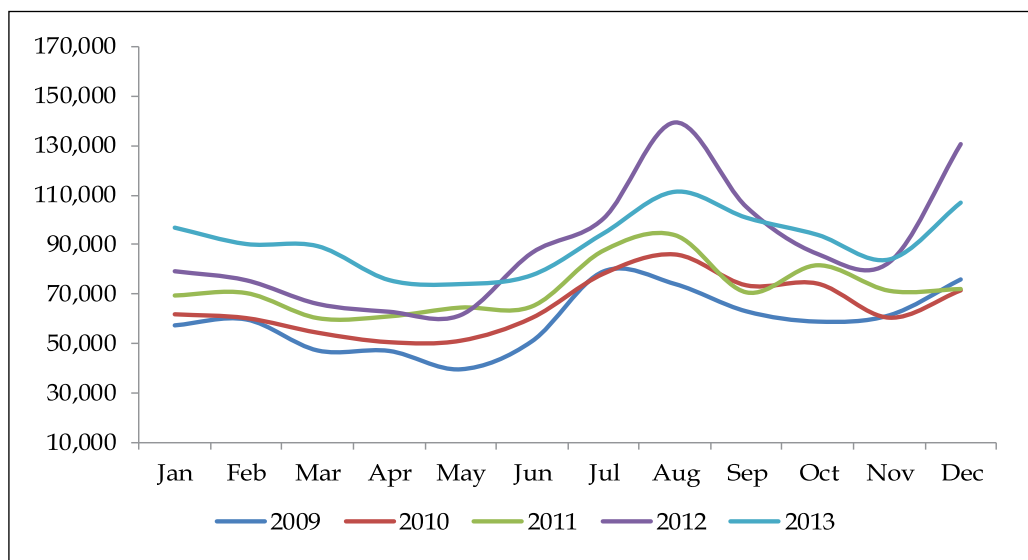
Fastjet introduced the first international route between Dar es Salaam and Johannesburg in September 2013, flying three times a week. The flight brought to an end the monopoly over this route which for many years was operated by one airline. The route is expected to increase the number of international tourists from South Africa, which is one of the main tourist source markets for Tanzania. The airline also introduced daily flights between Dar es Salaam and Mbeya effective December 2013. The new route is expected to increase the number of tourists visiting the tourism attractions located in the southern circuit.

Chapter 2: Analysis of the Survey's Results

2.1 Introduction

This chapter presents the analysis of the findings of the 11th International Visitors' Exit Survey which was conducted for a period of four weeks; two weeks during the high season and two weeks during the low season. As indicated in **Chart 2.1**, the high tourist season for Tanzania lies between July and September, while the low season is between March and May. The comprehensive international visitors' exit survey which covers both low and high seasons is normally conducted after every five years. The previous comprehensive surveys were conducted in 2001 and 2007. The survey's results provide useful information on international visitors to Tanzania such as their expenditure, length of stay, purposes of visits, gender, age group, travel arrangements and source markets. The results are used for policy formulation and tourism promotion.

Chart 2.1: International Tourist Arrivals to Tanzania, 2009–2013



Source: Immigration Department

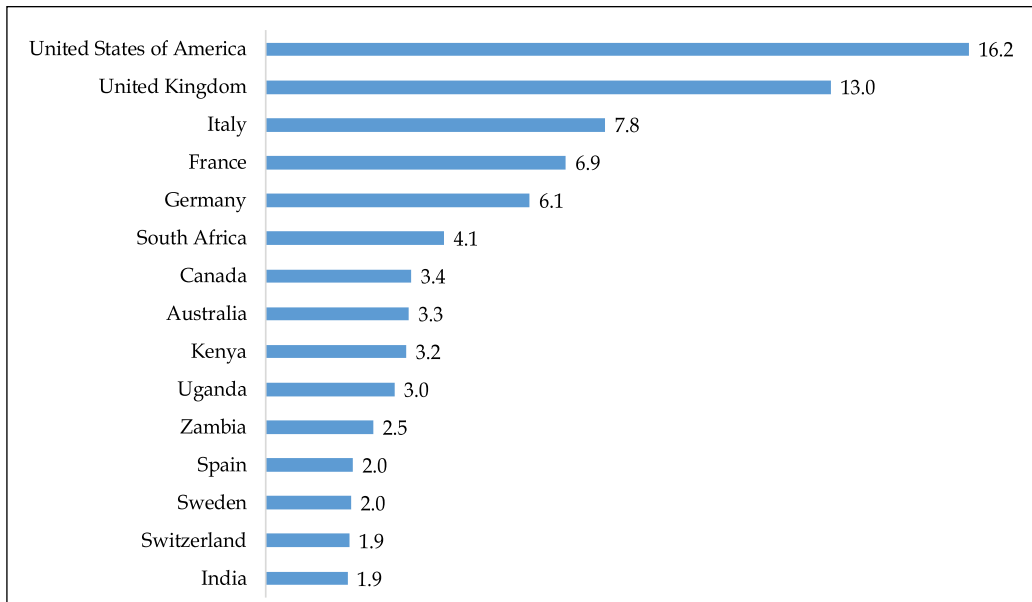
2.2 Source Markets

The survey's findings for the United Republic of Tanzania show that out of a total of 24,004 visitors from 126 countries, 16.2 percent came from

the United States of America, followed by the United Kingdom which accounted for 13.0 percent (**Chart 2.2**). The list of the top 15 source markets remained broadly similar to that of the previous comprehensive survey with the exception of Netherlands, Belgium, Norway and Japan which have been replaced by Uganda, Sweden, Switzerland and India. The prominence of Uganda and Kenya is largely associated with the ongoing regional integration initiatives under the East African Community while the appearance of India reflects increased promotional efforts in emerging markets geared towards decreasing overdependence on traditional source markets of Europe and America. Consequently, the concentration of visitors from the traditional top 15 source markets declined to 77.3 percent from 85.3 percent reported in the previous comprehensive survey.

Chart 2.2: Top 15 Source Markets for the United Republic of Tanzania

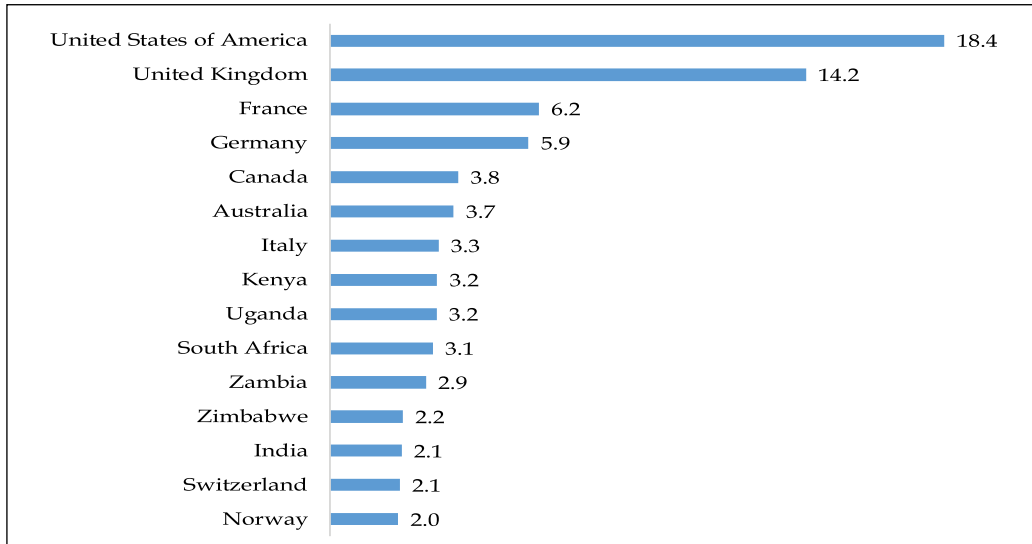
Percent



The survey’s results show that the main source markets for Tanzania Mainland during 2013 were the United States of America and the United Kingdom. Further, the results show that Uganda, Zimbabwe, Switzerland and Norway are new major source markets that appear in the list of the top 15 source markets replacing Spain, Ireland, Netherlands and Belgium (**Chart 2.3**).

Chart 2.3: Top 15 Source Markets for Tanzania Mainland

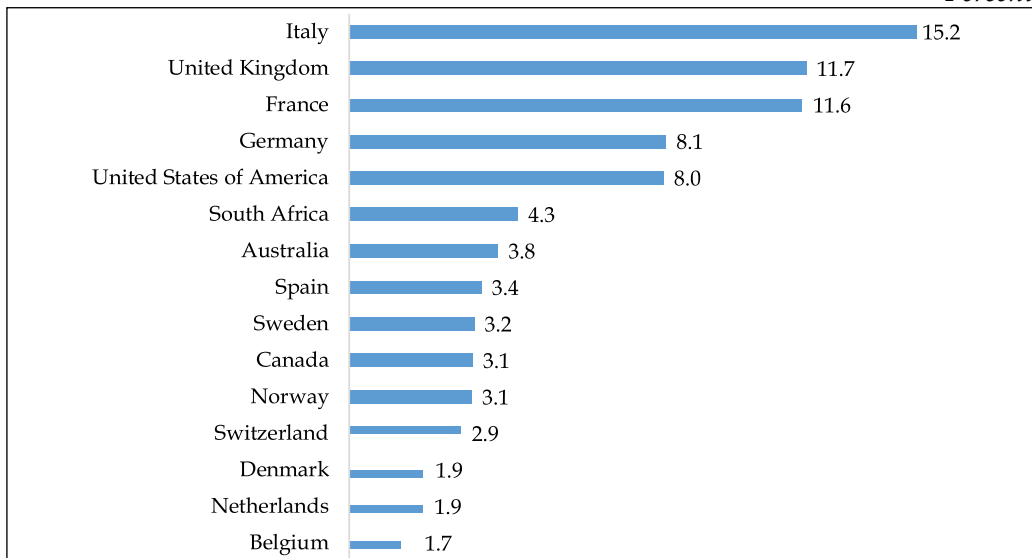
Percent



In the case of Zanzibar, Italy, the United Kingdom and France continued to be the major source markets (**Chart 2.4**). The composition of the top 15 source markets remained broadly the same, with countries changing ranks within the group and Sweden, Denmark and Norway replacing New Zealand, Kenya and UAE.

Chart 2.4: Top 15 Source Markets for Zanzibar

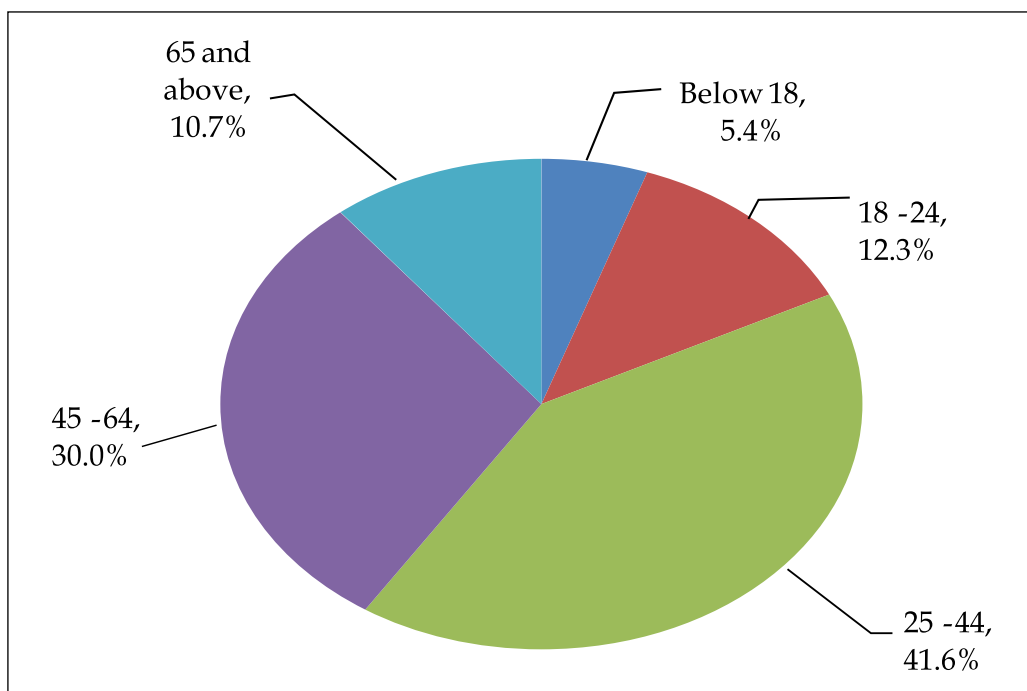
Percent



2.3 Age Group

The survey's findings indicate that young and active age group of "25-44" took the lead by accounting for about 42.0 percent of all visitors, followed by the age group of "45-64", which accounted for 30.0 percent (Chart 2.5). The same pattern was observed in the previous surveys. The senior visitors (65 years and above) accounted for about 11.0 percent of all visitors, compared to seven percent recorded in the previous survey. This is a positive development since this age group has high disposable income and ample time for leisure. Visitors below 18 years accounted for the lowest share.

Chart 2.5: Visitors by Age Group



2.4 Gender

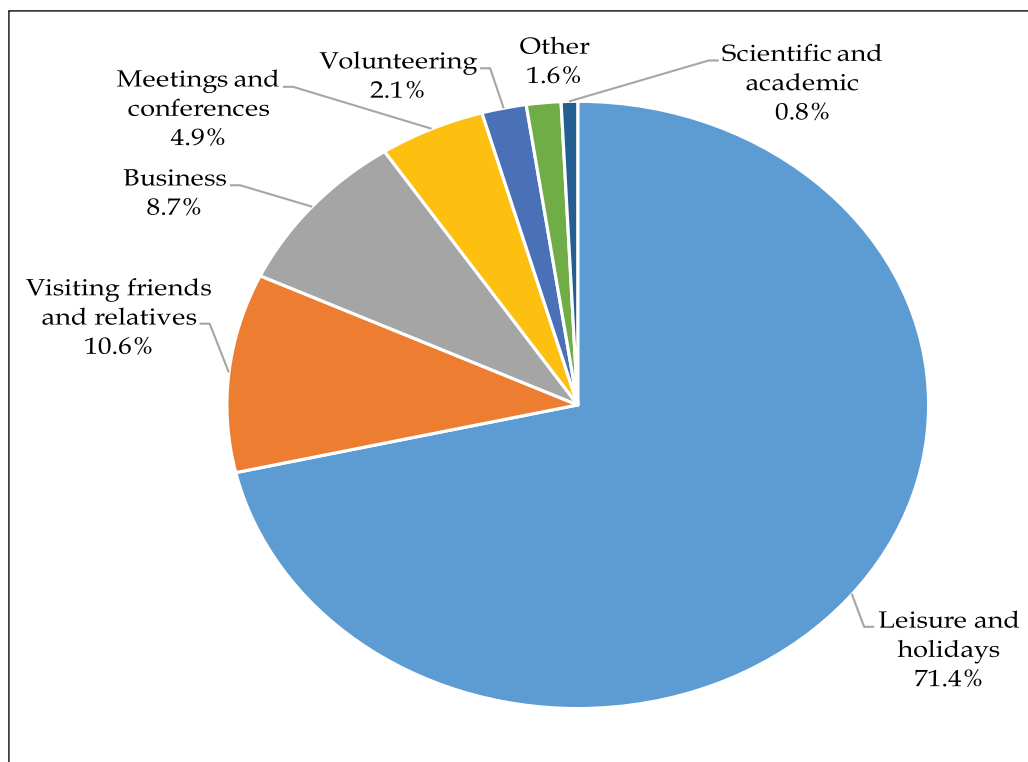
Out of the total visitors surveyed, 52.0 percent were male and 48.0 percent were female. This gender balance remained broadly unchanged over the last three years. However, if viewed in terms of purposes of visit, male visitors dominated in the business category (78.0 percent), meetings and

conferences (68.1 percent), scientific and academic (60.4 percent) as well as in visiting friends and relatives (53.6 percent). Female visitors were dominant in volunteering (62.0 percent) and leisure and holiday purposes (52.0 percent).

2.5 Purpose of Visit

The survey's results indicate that the majority of visitors came to Tanzania for leisure and holidays (**Chart 2.6**). Second in prominence were tourists who came to visit friends and relatives, followed by those who came for business, meetings and conferences. On the other hand, visitors who came as volunteers and for scientific and academic purposes were the least. The dominance of visitors who came for leisure and holidays is largely attributed to the country's unique nature and wide range of tourist attractions.

Chart 2.6: Purpose of Visit



Note: Other purposes include education, medical, transit, sports, etc.

Most holiday makers came from the United States of America, followed by the United Kingdom and Italy. Visitors who came mainly for business purpose were from Zambia, South Africa and Kenya, while those who came as volunteers and to visit friends and relatives were from the United Kingdom and the United States of America (Table 2.1).

Table 2.1: Percentage Distribution of Top 15 Source Markets by Purpose of Visit

ToP 15 Source Markets	Purpose of Visit							Grand Total
	Business	Leisure and Holidays	Meetings and Conference	Volunteering	Scientific and Academic	Visiting Friends and Relatives	Other	
United States of America	9.5	24.3	11.3	23.9	22.8	10.5	6.7	20.9
United Kingdom	9.4	16.9	15.6	30.1	26.5	19.8	11.2	16.8
Italy	1.3	12.4	0.8	11.2	4.4	4.9	7.8	10.1
France	1.6	11.6	1.1	0.3	0.0	2.2	0.7	8.9
Germany	1.9	8.6	6.4	2.4	9.6	8.9	3.0	7.9
South Africa	13.4	4.4	10.4	0.0	0.0	5.3	5.2	5.3
Canada	0.2	4.8	3.0	13.6	2.2	3.6	2.2	4.3
Australia	1.6	5.1	1.0	6.4	2.2	1.3	2.2	4.3
Kenya	11.4	1.2	28.5	0.3	9.6	6.2	30.2	4.2
Uganda	8.0	0.8	9.6	0.5	7.4	18.9	20.9	3.8
Zambia	32.5	0.2	1.9	0.3	0.7	5.3	4.5	3.2
Spain	0.7	3.1	0.7	5.9	0.0	1.0	0.4	2.6
Sweden	0.7	2.6	1.4	4.3	13.2	2.9	1.1	2.6
Switzerland	0.4	2.9	1.4	0.3	1.5	2.4	0.4	2.5
India	7.3	1.1	7.0	0.8	0.0	6.8	3.4	2.4
Grand Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Number of visitors = n	1,349	13,711	910	376	136	1,797	268	18,547

Table 2.2 indicates that region-wise, Europe was the leading source market for visitors who came for leisure and holidays, followed by the Americas, and East Asia and the Pacific. On the other hand, most visitors from Africa came for business, meetings and conferences as well as visiting friends and relatives. The highest proportion of visitors who came for scientific and academic purposes was from Europe, followed by Africa.

Table 2.2: Purpose of Visit by Regions, 2013

Regions	Purpose of Visit (Percent)						
	Business	Leisure and Holidays	Meetings and Conference	Scientific and Academic	Visiting Friends and Relatives	Volunteering	Other
Africa	67.9	6.6	47.1	19.8	40.7	1.2	55.2
Americas	6.7	24.5	11.4	17.0	10.2	30.2	9.7
East Asia and The Pacific	3.9	7.3	5.0	5.5	2.3	7.9	4.5
Europe	14.2	59.1	29.0	54.9	36.5	59.4	25.9
Middle East	2.2	1.4	1.4	2.7	5.3	0.6	2.4
South Asia	5.1	1.1	6.1	0.0	5.0	0.6	2.4
Total	100	100	100	100	100	100	100
n=Total Visitors (absolute)	2,095	17,144	1,171	182	2,537	493	382

2.6 Travel Arrangement

The choice of travel arrangements depends on factors such as price, destination (short or long haul), purpose of visit and whether it is a first time or a repeat visit. Other factors include security, social interaction and climate. Tourist can choose among two travel arrangements namely package and non -package (independent). The survey’s results show that more than 57.5 percent of visitors to Tanzania used the package travel arrangement. The same pattern was exhibited in the last six years with the exception of 2008 and 2011 (Table 2.3). The dominance of the non-package travel arrangement in 2008 and 2011 was partly explained by the global financial crisis that occurred in the mid-2008 and the sovereign debt crisis in the Euro zone that took place in 2011.

Table 2.3: Proportion of Visitors by Travel Arrangements

Year	Travel Arrangement	
	Non-package	Package
2007	35.0	65.0
2008	56.2	43.8
2009	34.7	65.3
2010	36.5	63.5
2011	52.0	48.0
2012	34.0	66.0
2013	42.5	57.5

The survey's results reveal that the majority of visitors from Italy, France, the United States of America, the United Kingdom, Australia, and Canada came under the package travel arrangement. Under the same travel arrangement, the results show that a small proportion of visitors were from Zambia, Uganda and Kenya. Under the non-package travel arrangement, the majority of visitors came from the neighboring countries, largely due to their knowledge and great social interactions with Tanzania (Table 2.4).

Table 2.4: Proportion of Visitors by Source Markets by Travel Arrangement

Top 15 Source Markets	Travel Arrangement (Percent)		Total Visitors
	Non-package	Package	
United States of America	23.7	76.3	3,884
United Kingdom	41.6	58.4	3,156
Italy	17.8	82.2	1,876
France	19.8	80.2	1,659
Germany	41.4	58.6	1,459
South Africa	46.4	53.6	987
Canada	28.5	71.5	806
Australia	24.8	75.2	793
Kenya	83.3	16.7	778
Uganda	95.7	4.3	713
Zambia	97.0	3.0	595
Sweden	51.0	49.0	473
Switzerland	40.0	60.0	465
India	72.7	27.3	454
Others	55.4	44.6	5,423

The majority of visitors who came for business, conference, visiting friends and relatives prefer to make their own travel arrangements. However, more than three-quarters of the visitors who came for leisure and holidays had higher preference for the package travel arrangement (Table 2.5).

Table 2.5: Distribution of Visitors by Travel Arrangement and Purpose of Visit

Travel Arrangement	Purpose of Visit (Percent)					Total Visitors
	Business	Leisure and Holidays	Meetings and Conferences	Visiting Friends and Relatives	Other	
Non-Package Tour	91.0	24.7	85.9	89.9	72.8	10,203
Package Tour	9.0	75.3	14.1	10.1	27.2	13,801
Total	100.0	100.0	100.0	100.0	100.0	24,004

Table 2.6 depicts that under the non-package travel arrangement, Zambia took the lead in business, followed by Kenya, the United Kingdom and the United States of America. The dominance of Zambia is partly explained by their utilization of Dar es Salaam port for import and export of goods, given that Zambia is a landlocked country. Likewise, Kenya led in attending conferences while Uganda and the United Kingdom dominated in visiting friends and relatives.

Table 2.6: Distribution of Visitors under the Non-package by Purpose of Visit

Top 15 Source Markets	Purpose of Visit (Percent)				
	Business	Leisure and Holidays	Meetings and Conferences	Visiting Friends and Relatives	Others
United States of America	5.7	11.5	8.6	6.8	11.0
United Kingdom	5.9	14.4	13.1	14.1	15.7
Italy	0.7	5.3	0.4	1.8	6.5
France	0.8	6.3	0.9	1.6	0.1
Germany	1.2	9.0	4.6	5.7	3.0
South Africa	7.3	3.4	8.1	3.7	1.0
Canada	0.2	2.1	2.6	2.7	6.9
Australia	1.1	2.9	0.8	0.8	3.5
Kenya	6.8	2.2	23.4	4.6	11.0
Uganda	5.7	2.1	7.9	14.8	8.7
Zambia	22.7	0.6	1.6	4.0	1.8
Spain	0.4	2.5	0.5	0.7	1.8
Sweden	0.5	3.3	1.2	2.1	4.0
Switzerland	0.3	3.1	1.1	1.4	0.4
India	4.9	1.4	6.1	4.5	1.6
Others	35.8	29.9	19.3	30.7	22.9
Total	100.0	100.0	100.0	100.0	100.0
Total visitors (absolute)	1,906	4,239	1,006	2,282	770

Under the package tour arrangement, the United States of America took the lead in leisure and holidays, followed by the United Kingdom, Italy and France. Meanwhile, about 52.0 percent of business visitors came from South Africa, Kenya, the United States of America and the United Kingdom. The majority of visitors from Italy, the United Kingdom, the United States of America and Germany came to visit friends and relatives (Table 2.7).

Table 2.7: Distribution of Visitors under Package by Purpose of Visit

Top 15 Source Market	Purpose of Visit (Percent)				
	Business	Leisure and Holidays	Meetings and Conferences	Visiting Friends and Relatives	Others
United States of America	10.1	22.0	9.7	12.9	18.8
United Kingdom	7.9	13.2	6.1	13.7	20.2
Italy	2.1	11.4	1.8	18.0	6.6
France	3.2	10.2	0.6	1.2	0.7
Germany	1.1	6.2	7.3	11.4	2.4
South Africa	21.7	3.5	8.5	4.3	2.1
Canada	0.0	4.4	0.6	1.2	2.4
Australia	0.5	4.5	0.6	2.4	2.1
Kenya	12.7	0.5	14.5	2.4	3.5
Uganda	0.0	0.2	4.8	0.8	0.3
Zambia	3.7	0.0	0.6	2.0	0.0
Spain	0.5	2.5	0.6	0.4	3.1
Sweden	0.0	1.7	0.6	2.0	2.1
Switzerland	0.0	2.1	1.2	3.9	0.3
India	2.6	0.7	1.8	7.8	0.0
Others	33.9	16.8	40.6	15.7	35.2
Total	100.0	100.0	100.0	100.0	100.0
Total visitors (absolute)	189	12,905	165	255	287

2.7 First-Time and Repeat Visit

The survey's findings indicate that about 66.0 percent of all the interviewees came to Tanzania for the first time, while 34.0 percent were repeat visitors. First-time visitors have higher preference for the package tour arrangement, while repeat visitors have higher preference for the non-package tour arrangement since they are more familiar with the destination (Table 2.8).

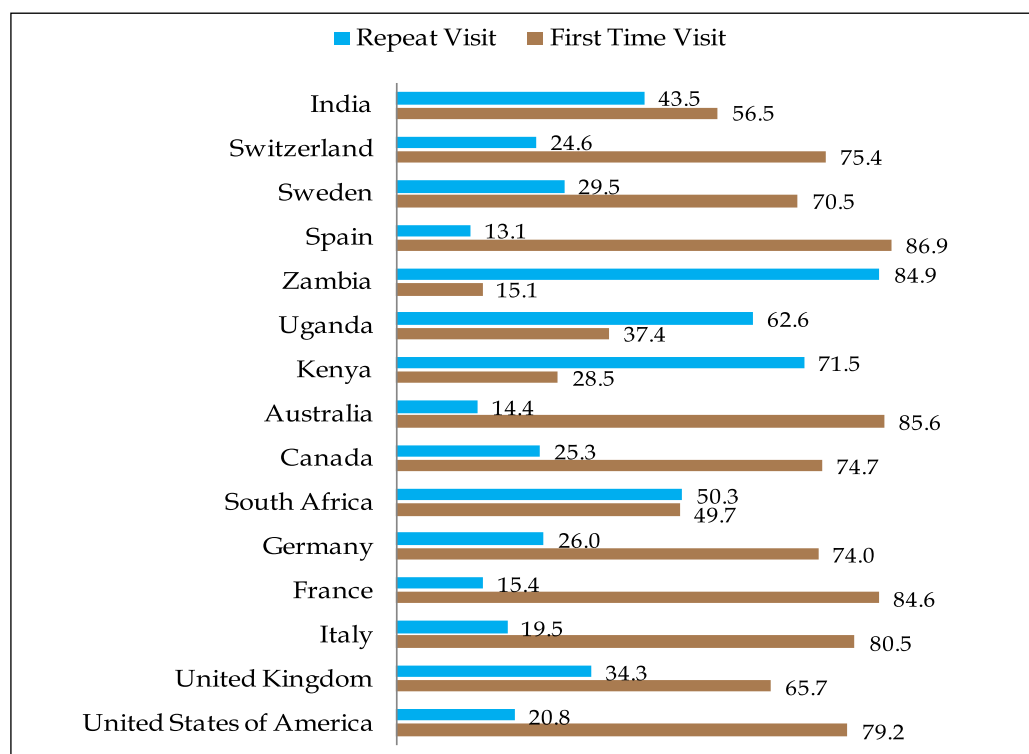
Table 2.8: First-Time and Repeat Visit, 2013

Type of Visit	Package		Non-Package		Total	%
	Interviewees	%	Interviewees	%		
First-time Visit	5,020	83.8	3,228	49.0	8,248	65.6
Repeat Visit	968	16.2	3,359	51.0	4,327	34.4
TOTAL	5,988	100.0	6,587	100.0	12,575	100.0

The results further show that with the exception of South Africa, Kenya, Uganda and Zambia, the majority of visitors from the top 15 source markets were first-time visitors (**Chart 2.7**).

Chart 2.7: First-Time and Repeat Visitors by Source Markets

Percent



As indicated in **Table 2.9**, most of the tourists, who are first-time visitors, came for leisure and holidays, followed by those who came to visit friends and relatives.

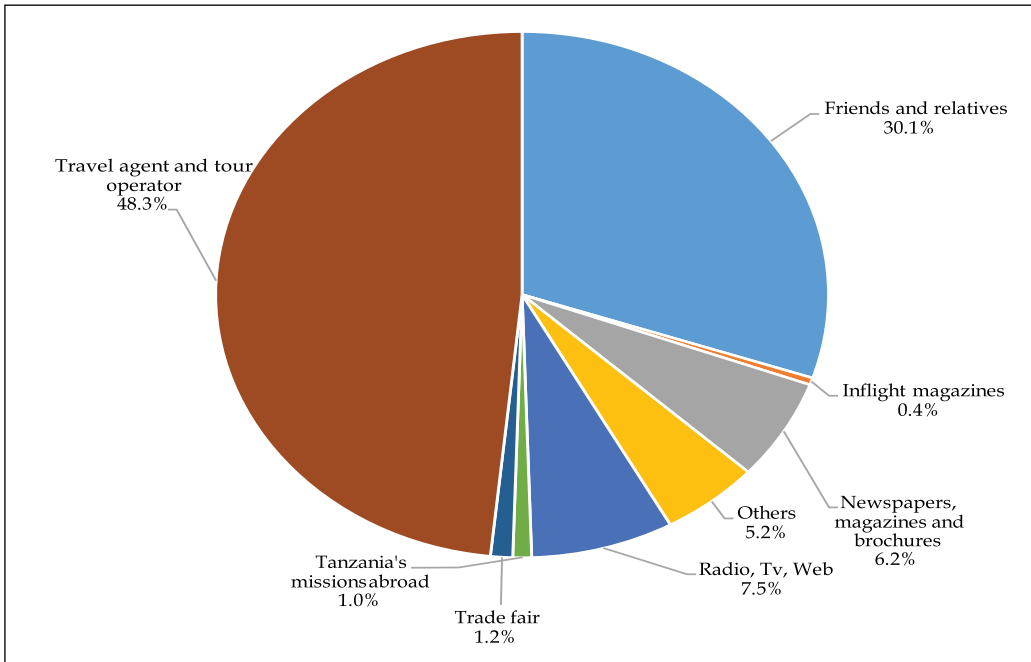
Table 2.9: First-Time Visitors by Purpose of Visit

Purpose of Visit	% of Visitors
Leisure and Holidays	76.3
Visiting Friends and Relatives	8.1
Business	7.2
Meetings and Conferences	4.1
Volunteering	2.1
Scientific and Academic	0.8
Other	1.2
Total	100.0

2.8 Source of Information

The survey's findings indicate that 48.3 percent of all the visitors received information about Tanzania's tourist attractions through travel agents and tour operators, while 30.1 percent were informed by friends and relatives (**Chart 2.8**). Most of the visitors who heard about Tanzania through travel agents and tour operators were from the United States of America, the United Kingdom, Italy and France, while those who received information through friends and relatives were mostly from the United Kingdom and the United States of America. The other sources of information were radio, television, web, newspapers and magazines. About one percent of the visitors heard about Tanzania through trade fairs and the Tanzania's missions abroad.

Chart 2.8: Source of Information About Destination Tanzania, 2013



2.9 Travel Party

The survey's findings show that most of the visitors were accompanied by friends and relatives. This is different from the 2012 results which indicated that the largest number of visitors travelled alone. Those who travelled with children continue to be the least (**Chart 2.9**).

Chart 2.9: Visitors by Travel Party, 2013

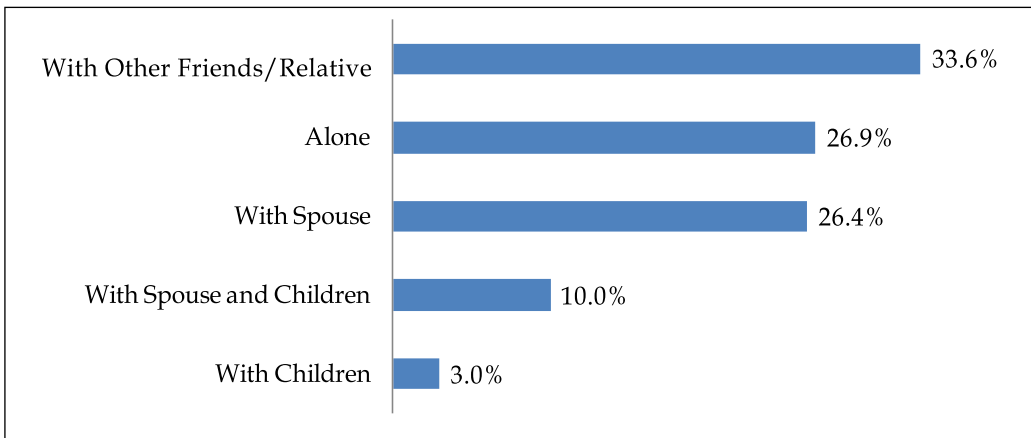


Table 2.10 indicates that the large number of visitors who travelled alone and those who travelled with friends and relatives were in the age group of 25-44.

Table 2.10: Travel Party by Age Group

Travel Party	below 18	18-24	25-44	45-64	65 and above	Total
Alone	26	924	3,289	1,797	430	6,466
With Children		50	300	312	54	716
With Other Friends/Relatives	80	1,390	3,707	2,263	635	8,075
With Spouse	4	229	2,559	2,384	1,162	6,338
With Spouse and Children	2	57	912	1,339	99	2,409
Total	112	2,650	10,767	8,095	2,380	24,004

2.10 Departure Points

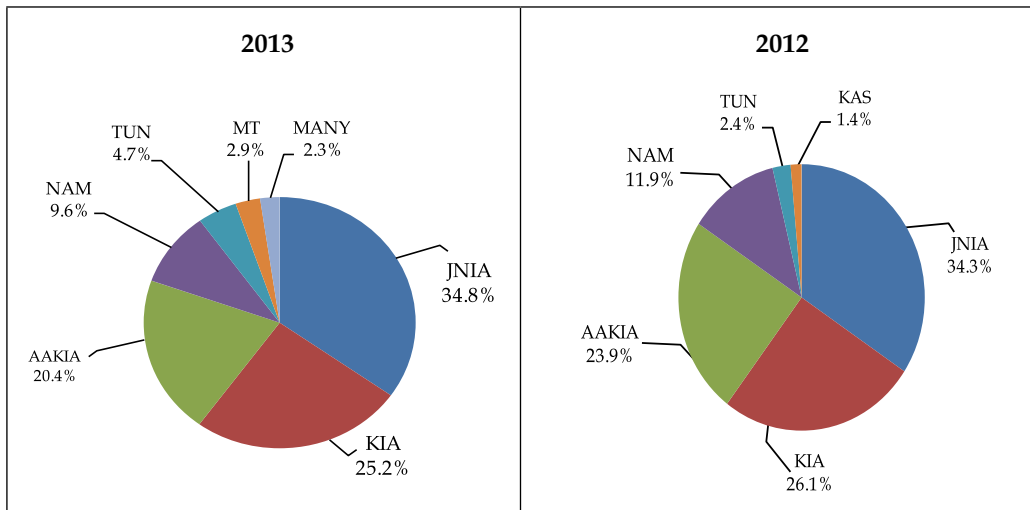
The 2013 survey covered seven departure points - three airports and four border posts. The majority of the visitors (80.4 percent) departed through airports (**Table 2.11**). The prominence of airports as departure points is largely explained by the fact that most visitors to Tanzania are from long-haul destinations.

Table 2.11: Distribution of Visitors by Departure Points

Departure Points	Visitors	Percent
JNIA	8,351	34.8
KIA	6,058	25.2
AAKIA	4,897	20.4
NAM	2,309	9.6
TUN	1,130	4.7
MT	704	2.9
MANY	555	2.3
Total	24,004	100

The share of visitors who used land border posts increased to 19.5 percent in 2013 from 15.7 percent recorded in 2012 (**Chart 2.10**). A large number of visitors who used land border posts came from the neighbouring countries, i.e. Zambia, Kenya, Uganda, and Zimbabwe.

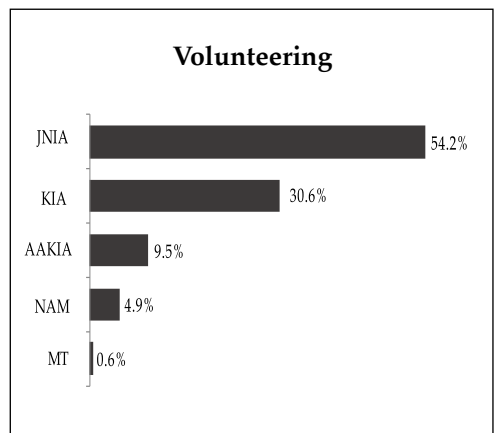
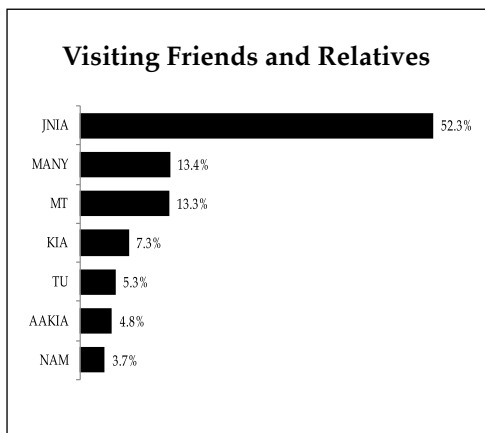
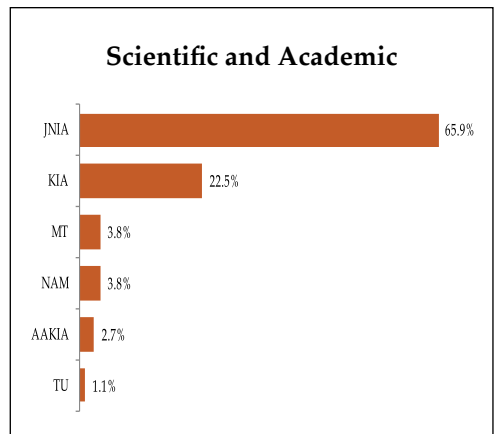
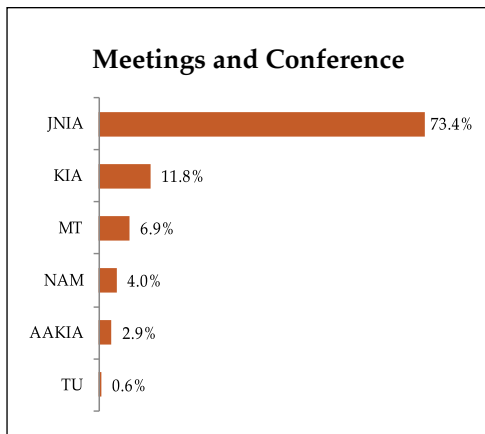
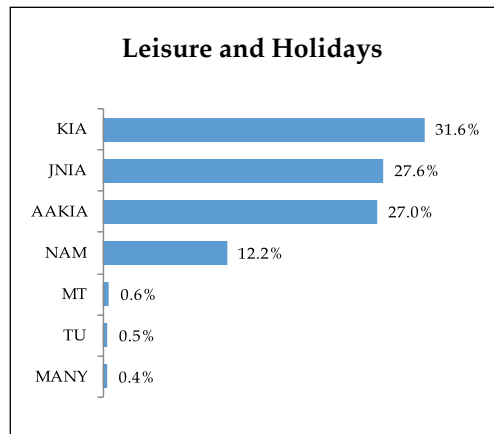
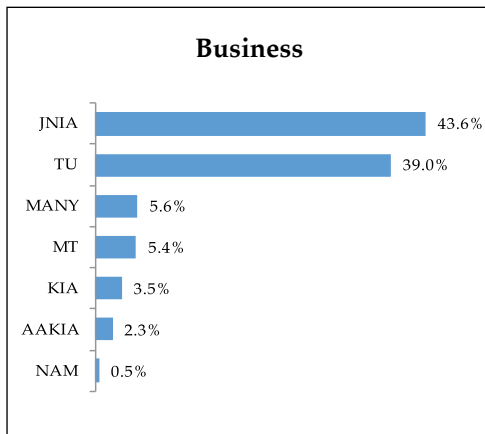
Chart 2.10: Distribution of Visitors by Departure Points



As shown in **Table 2.11**, the majority of the visitors departed through JNIA since it is the departure point for most international airlines coupled with the fact that Dar es Salaam is the commercial hub with vast economic activities. This is also reflected in **Chart 2.11**, where JNIA is the leading departure point for all purposes of visit with the exception of leisure and holidays. KIA, which is second in prominence, was used mostly by visitors who came for leisure and holidays, and meetings and conferences. This is due to its proximity to Arusha region, where most international conferences are held and the presence of a variety of tourist attractions in the northern circuit such as Mount Kilimanjaro, Ngorongoro Crater and Manyara National Park.

The most used departure point among the land border posts was Namanga and was mainly for visitors who came for leisure and holidays. Tunduma border post was dominated by visitors who came for business purposes reflecting an increase in trade activities between Tanzania and Zambia (**Chart 2.11**).

Chart 2.11: Distribution of Visitors by Purpose and Departure Points



2.11 Length of Stay

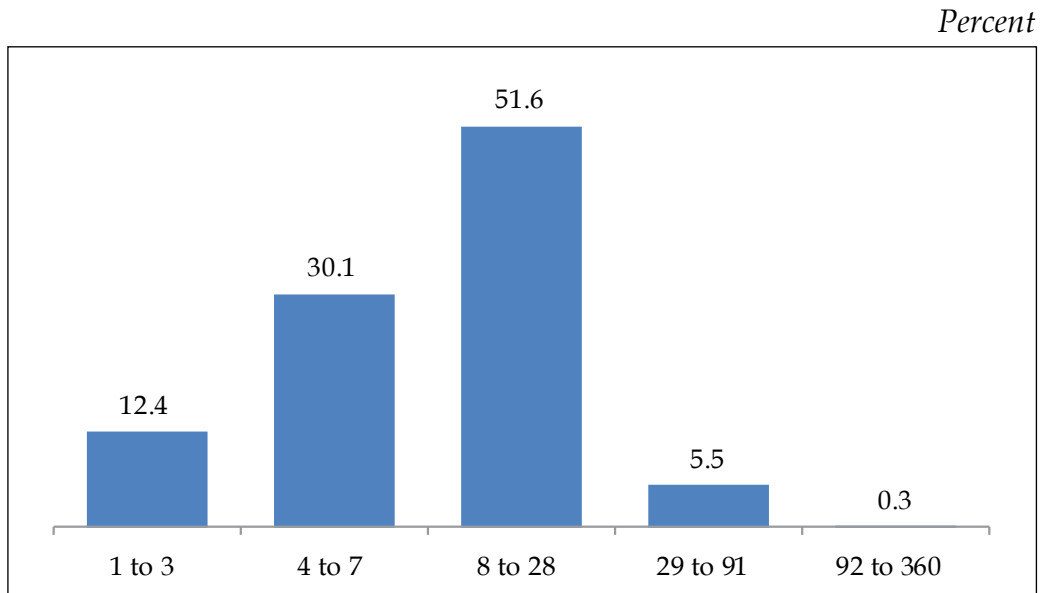
Length of stay or nights spent by tourists is an important indicator in the tourism industry. It is a key variable used in the estimation of tourist expenditure in the country. The 2013 survey's results show that the overall average length of stay of visitors to the United Republic of Tanzania was 10 nights, which is similar to the results obtained in 2012 and 2011 surveys. Visitors from Germany and Canada stayed the longest with 13 nights, followed by Sweden and Switzerland, which recorded 12 nights each. South Africa, Uganda, Zambia and India registered an average length of stay of less than 10 nights, with Kenya recording the lowest length of stay. Visitors under the non-package tour arrangements and package tour arrangements stayed nine nights and 10 nights, respectively (Table 2.12).

Table 2.12: Average Length of Stay of Visitors to the United Republic of Tanzania

Country of Residence	Non-Package Visitors' Country Average	Package Visitors' Country Average	Combined country Average
United States of America	10	10	10
United Kingdom	11	11	11
Italy	12	9	11
France	10	10	10
Germany	13	12	13
South Africa	6	7	7
Canada	13	12	13
Australia	11	11	11
Kenya	4	5	5
Uganda	6	9	8
Zambia	4	9	7
Spain	10	10	10
Sweden	12	11	12
Switzerland	12	12	12
India	7	7	7
Average	9	10	10

Chart 2.12 indicates that 51.6 percent of visitors spent between eight and twenty-eight nights in the country, while those who spent between one and three months accounted for 5.5 percent. Very few visitors stayed beyond three months.

Chart 2.12: Proportion of Visitors by Night Spent in the URT, 2013



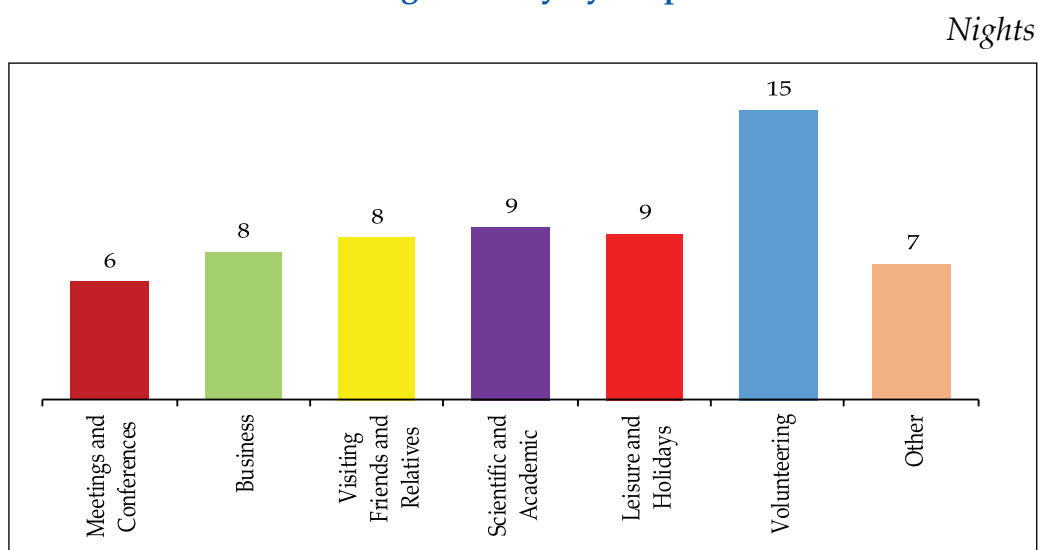
In the case of Zanzibar, the overall average length of stay was six nights. This length of stay has remained the same for the past three consecutive years. Visitors from Italy, Germany, Sweden and Denmark stayed the longest, with an overall average length of eight nights. On the other hand, Australia and Canada recorded the lowest average length of stay of five nights (**Table 2.13**).

Table 2.13: Average Length of Stay of Visitors to Zanzibar

Country of Residence	Non-Package Visitors' Country Average	Package Visitors' Country Average	Combined Average
Italy	8	8	8
United Kingdom	7	5	6
France	7	6	7
Germany	8	8	8
United States of America	6	5	6
South Africa	6	6	6
Australia	5	5	5
Spain	6	5	6
Sweden	8	7	8
Canada	5	4	5
Norway	5	6	6
Switzerland	7	6	7
Denmark	9	6	8
Netherlands	8	5	7
Belgium	6	7	7
Average	6	6	6

Visitors who stayed long are those who came as volunteers, holiday makers and for scientific and academic purposes. However, those who came to attend meetings and conferences recorded a minimal length of stay (**Chart 2.13**).

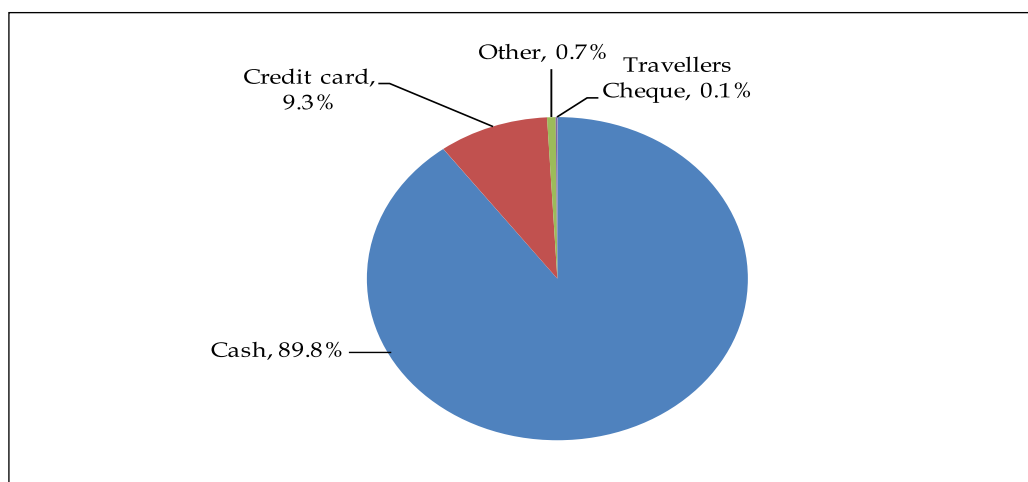
Chart 2.13: Length of Stay by Purposes of Visit



2.12 Mode of Payment

The survey's findings indicate that 89.8 percent of the visitors settled their bills by cash. Only 9.3 percent used credit cards while those who used travellers' cheques were the least (**Chart 2.14**). Unacceptability of credit cards at most of the tourism establishments has largely contributed to the minimal use of credit cards as mode of payment. It is worth noting that this has been an issue of concern to visitors for quite some time. In this regards, there is a need for owners of tourism establishments and other relevant stakeholders to take deliberate initiatives to make the use of credit Cards facility possible.

Chart 2.14: Payment Mode



2.13 Tourism Activities

Table 2.14 depicts that wildlife tourism is the most preferred tourist activity in Tanzania. These results reflect the country's wealth in wildlife, which is known to be the home of Africa's most magnificent game reserves, fabulous national parks and the famous Ngorongoro Conservation Area. Visitors who were mostly attracted to wildlife tourism came from the United States of America, the United Kingdom, France and Germany. Beach tourism was the second activity, which attracted more visitors from Italy, the United Kingdom and France. Mountain climbing was the third most preferred activity, attracting the majority of visitors from the United Kingdom and the United States of America (**Table 2.14**).

Table 2.14: Primary Tourism Activities by Country of Residence, 2013

Country of Residence	Tourism Activities (percent)										
	Beach Tourism	Bird tourism	Business	Conference tourism	Cultural Tourism	Diving and Sport Fishing	Hunting	Mountain Climbing	Wildlife Tourism	Others	
United States of America	4.1	11.5	7.0	9.9	9.4	0.0	22.7	20.7	25.9	6.2	
United Kingdom	8.8	9.2	11.0	12.2	11.4	0.1	13.6	39.4	8.9	13.6	
Italy	20.5	6.9	1.1	0.5	6.3	0.2	0.0	1.0	5.0	3.0	
France	8.5	6.2	1.4	0.6	6.3	0.2	0.0	5.1	8.1	1.0	
Germany	6.8	3.1	1.2	4.6	5.7	0.1	0.0	4.3	7.2	4.0	
South Africa	7.2	16.9	14.1	7.4	2.4	0.1	0.0	1.1	1.9	4.3	
Canada	1.6	0.8	0.6	1.6	2.5	0.0	4.5	4.0	5.0	2.1	
Australia	1.1	2.3	1.3	0.7	2.3	0.0	0.0	4.5	5.2	0.6	
Kenya	3.4	1.5	9.2	23.2	2.4	0.0	18.2	0.2	0.8	10.4	
Uganda	2.6	0.8	5.9	8.1	3.0	0.0	4.5	0.1	1.4	14.3	
Zambia	4.3	4.6	10.6	2.0	4.9	0.0	4.5	0.3	0.7	3.8	
Spain	2.1	0.0	0.6	0.6	0.8	0.0	9.1	1.0	2.8	0.9	
Sweden	2.4	1.5	0.8	0.5	3.0	0.0	0.0	0.6	2.2	2.1	
Switzerland	1.3	7.7	0.8	0.6	2.7	0.0	0.0	1.4	2.6	1.2	
India	1.4	0.8	6.1	4.4	1.2	0.0	0.0	0.2	1.8	4.1	
Others	23.9	26.2	28.0	23.1	35.7	0.1	22.7	16.2	20.6	28.4	
Grand Total	100.0	100.0	100.0	100.0	100.0	1.0	100.0	100.0	100.0	100.0	
n= Total Visitors (absolute)	5,215	130	969	811	1,725	443	22	2,653	10,318	1,718	



Magnificent wildlife



Great view of Mount Kilimanjaro and Zanzibar Sandy beaches

2.14 Average Expenditure

In 2013, the overall average expenditure of a visitor to Tanzania was USD 284 per person per night compared to USD 217 recorded in 2007. The results further show that visitors who came independently spent an average of USD 201 per person per night and those under the package tour arrangement spent an average of USD 372 per person per night compared to an average of USD 132 and USD 284, respectively spent in 2007.

2.15 Cost of Touring Tanzania

During the 2013 survey, the majority (51.2 percent) of the interviewed visitors revealed that the cost of touring Tanzania is similar to those of other African countries. Most of visitors were from the United States of America, the United Kingdom and Australia. Most interviewed visitors from neighboring countries such as Zambia, Kenya and Uganda indicated that the cost is lower and this can be partly explained by their proximity to Tanzania. Meanwhile, visitors from France, South Africa, Spain and Germany showed that the cost is higher when compared with other African countries (**Table 2.15**).

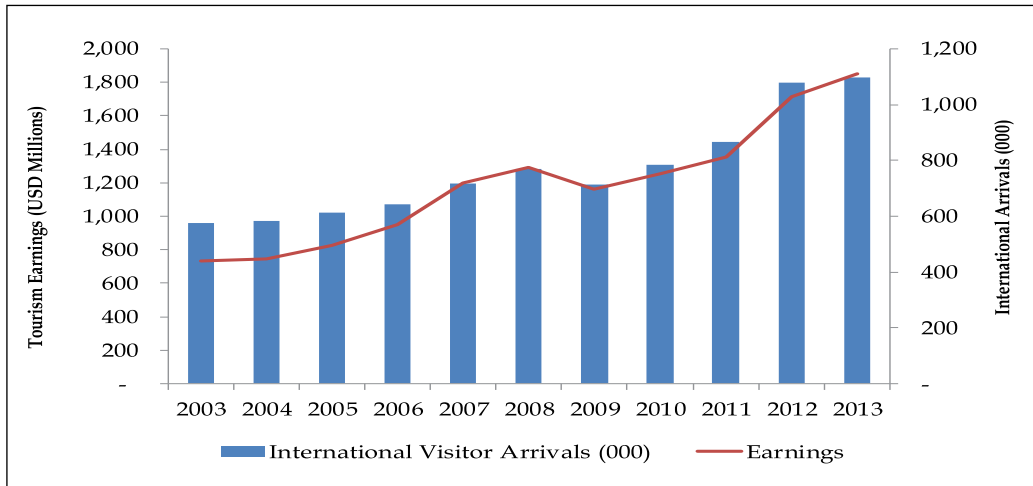
Table 2.15: Cost of Touring Tanzania

Top 15 source Markets	Cost of Touring Tanzania (Percent)			
	Higher	Lower	Same	
United States of America	23.9	14.3	61.9	100
United Kingdom	23.5	20.7	55.8	100
Italy	34.8	13.3	51.9	100
Germany	41.9	9.7	48.3	100
South Africa	42.1	10.6	47.4	100
Zambia	26.5	38.3	35.2	100
Kenya	23.3	31.7	45.0	100
France	47.6	8.8	43.6	100
Uganda	31.7	30.7	37.6	100
Australia	24.4	14.4	61.2	100
Canada	29.0	14.5	56.5	100
India	29.8	23.1	47.1	100
Spain	42.4	8.9	48.7	100
Sweden	29.1	15.2	55.6	100
Switzerland	39.0	14.2	46.8	100
n=	2,173	1,294	3,642	7,109
% of the Total	30.6	18.2	51.2	100

2.16 Tourism Earnings

Tanzania's tourism earnings increased by 8.2 percent to USD 1,853.3 million in 2013, from USD 1,712.7 million recorded in 2012 (Chart 2.15). This development is mainly driven by the increase in the number of international tourist arrivals. Similarly, Zanzibar earned USD 210.5 million in 2013 compared with USD 175.4 million earned in 2012, the development is largely associated with the increase in the number of international tourist arrivals to 195,553 from 149,586 in 2012.

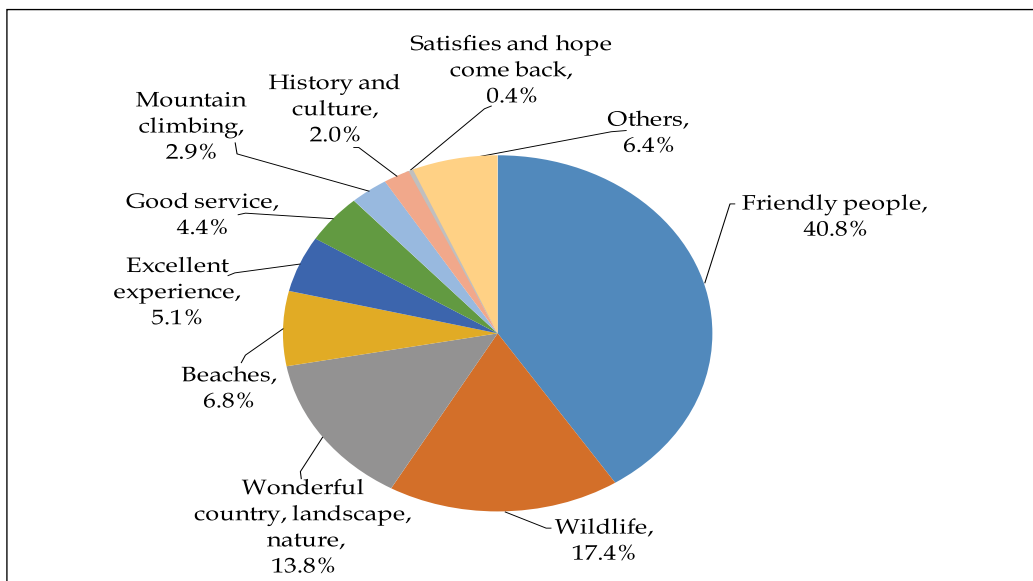
Chart 2.15: Tourism Earnings and International Tourist Arrivals to Tanzania



2.17 Visitors’ Perception About Tanzania

Chart 2.16 reveals that about 41.0 percent of the visitors were impressed by the friendliness of the people and their hospitality to foreigners. Tourists were also impressed by the wildlife, wonderful country, nature and the landscape. These findings are consistent with what was observed in the previous surveys.

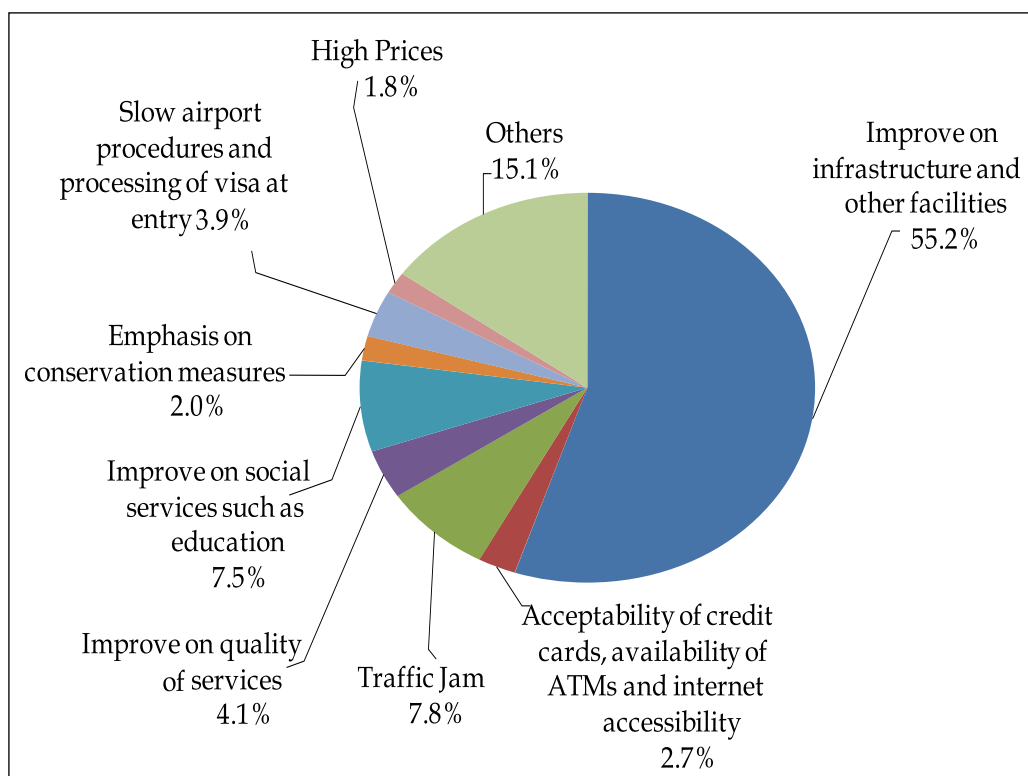
Chart 2.16: What Impressed Visitors



2.18 Areas that Need Improvement

Chart 2.17 indicates that 55.2 percent of all the visitors raised concerns on the state of the infrastructure and other facilities such as roads within the national parks, toilets, water supply and air conditioners at the airports and signage. Other major concerns were traffic jam, quality of services, slow airport procedures, visa processing at entry points, unacceptability of credit cards, unavailability of ATMs and unreliability of the internet access at most of the tourism establishments. Visitors were also concerned with the state of historical buildings, particularly in the Stone Town - Zanzibar.

Chart 2.17: Areas that Need Improvement



Chapter 3: Conclusion and Policy Recommendations

3.1 Conclusion

Tanzania's tourism industry continued to grow in 2013 as indicated by an increase in the number of international tourist arrivals and tourism earnings. The number of international tourist arrivals to Tanzania increased by 1.7 percent to 1,095,885 in 2013 from 1,077,058 recorded in 2012. As a result, tourism earnings increased by 8.2 percent to USD 1,853.28 million in 2013 from USD 1,712.7 million recorded in 2012. The increase was largely attributed to the efforts taken by the Government to promote tourism as well as improvement in tourist services, particularly hotels, communication and infrastructure.

3.2 Policy Recommendations

- a) The survey's findings revealed that the majority of visitors used cash as a mode of payment while few used credit cards. The small number of visitors using credit cards support raised concerns about the unacceptability of this facility by most tourism establishments. Therefore, the Government through national Public-Private Partnership (PPP) policy should sensitize and encourage the business community to accept the use of credit cards.

Responsible Institutions: MNRT, HAT, TCT, ZCT, and ZATI

- b) The survey's results indicated that an overall average length of stay of visitors to the United Republic of Tanzania was 10 nights, which is similar to the number reported in 2012 and 2011. This implies that there is a need of enhancing diversification of tourism products in order to increase the number of nights spent at destination by tourists. This will have a positive impact on tourist expenditure in the country.

Responsible Institutions: MNRT, TTb, LGAs, TCT, ZCT and ZATI

- c) The survey's findings revealed that only one percent of the visitors heard about Tanzania's tourist attractions through trade fairs and Tanzania's missions abroad. This implies that the government and

the private sector should increase promotion efforts, and even use other sources of information such as television, web, newspapers and magazines. Tanzania's missions abroad should spearhead the implementation of economic diplomacy in order to attract more tourists.

Responsible Institutions: MFAIC, MNRT, TTB, TCT, ZCT and ZATI

- d) Further, the survey's findings showed that wildlife tourism continued to be the leading activity in 2013, in spite of the country's endowment with a wide range of other tourist attractions such as sandy beaches, historical sites, mountains, nature and landscapes. This implies that more concerted efforts should be undertaken to promote other forms of tourist attractions to complement wildlife tourism.

Responsible Institutions: MNRT, TTB, TCT, ZCT and ZATI

- e) The findings also indicate that more than a half of the visitors raised concerns regarding the improvement of the infrastructure and other facilities, such as roads within the national parks, toilets, water supply and air conditioners at the airports and signage. Therefore, the government is urged to continue with its efforts to improve roads in the national parks and other facilities.

Responsible Institutions: MoW, TAA, TCAA, TANAPA, MNRT and LGAs

- f) Traffic jams in Dar es Salaam region was another main concern of the tourists. The government is advised to continue with its efforts to address such infrastructural issues.

Responsible Institutions: MoW, MoT and DCC

Appendices

Appendix A: The Survey's Methodology

I. Introduction

The survey's methodology was designed to collect data that would facilitate a better understanding of the status of the tourism sector and provide an instrument that will enable an appropriate follow-up mechanism. It consists of designing a sample and sample selection; survey instruments including a questionnaire; scope and coverage; training; data collection and processing; and estimation of tourist expenditure. The main objective of the survey is to provide reliable information about visitors to Tanzania, including their number, length of stay, expenditure, travel arrangement and their demographic characteristics.

II. Objective of the Survey

The primary objective of the survey was to collect up-to-date tourist expenditure information for use in the "Tourist Expenditure Model" developed in 2001. The Model was developed as a tool for estimation of international tourism receipts required in the compilation of National Accounts (NA) and Balance of Payments (BOP) statistics. These statistics are used by the public and the private sector for policy formulation and strategic business planning, respectively.

III. Scope of the Survey

The respondents for the survey were the departing international visitors. A person is considered as an international visitor if he/she travels to a country other than that of his/her usual residence, for a period not exceeding twelve months; and whose main purpose of visit is other than an activity remunerated from within the country visited.

IV. Sample Size

The survey was done on sample basis. It was planned to interview 10,771 departing international visitors, equivalent to one percent of the international visitors recorded in 2012. Ultimately, the survey managed to randomly interview about 12,575 respondents, who represented around

24,004 visitors in the sample. This sample was considered sufficient to meet the survey's objectives.

V. Fieldwork

The data collection exercise was undertaken for a period of four weeks; two weeks during the high season and two weeks during the low season. It started from 30th August 2013 to 12th September 2013, during the high season and from 24th February 2014 to 9th March 2014 during the low season. High tourist season for Tanzania normally lies between July and September while the low season is between March and May. Data were collected by seven teams; five in Mainland and one in Zanzibar. Technical Committee members participated in the field supervision of the interviews to ensure the questionnaires' completeness, quality and consistency.

VI. Survey's Coverage

In order to obtain the required information from international visitors, it was important to conduct the survey at entry/exit border points. The survey covered seven departure points, namely: Julius Nyerere International Airport, Kilimanjaro International Airport, Abeid Amani Karume International Airport, Namanga, Tunduma, Mtukula and Manyovu border points.

VII. The Enumerators' Manual

The Technical Committee developed the Enumerators' Manual (EM) that was used by enumerators as a reference document during the survey. The manual contained information and guidelines on the concepts and definitions of some of the key words used in the questionnaire. In addition, the manual provided the description of the questions and data cross checking mechanism.

VIII. Training of the Enumerators

A one day training of the enumerators and supervisors was organized by the Technical Committee members. A total of 26 enumerators and

seven supervisors were trained. The purpose of the training was to guide the enumerators to understand the questionnaire and equip them with interviewing techniques. The enumerators were also trained in methods of field editing, data quality control procedures and fieldwork coordination. The Enumerators' Manual was used as a guideline document during the training.

IX. The Questionnaire

The questionnaire was designed to ensure that the questions asked were in line with user's data needs. The information collected is useful for tourism promotion and macroeconomic policy formulation. A single questionnaire was used to gather information for the 2013 International Visitors' Exit Survey. The content of the questionnaire was based on the previous years' questionnaires with slight modifications. The questionnaire used in the survey had 24 questions and it comprised of four main parts, namely: visitor profiles, travel behavior, expenditure patterns and visitor comments (Appendix III).

Questions 1 to 9 aimed at establishing visitor profiles (nationality, country of residence, age group, purposes of visit, type of tourism activity and source of information about Tanzania).

Questions 10 to 15 aimed at obtaining information about the type of tour arrangement (package/non-package), items in the package and number of nights spent.

Questions 16 to 18 were structured to establish tourists' earnings ascribed to Tanzania. In addition, the questions probed for details on the amount of money spent in Tanzania.

Question 19 and 20 asked visitors about the most used mode of payment while in Tanzania and if they have travelled to any other African country.

Question 21 and 22 aimed at comparing cost with other African countries and whether the visit was the first time or not.

Question 23 and 24 sought information about areas that impressed the visitors and those which need improvement.

X. Data Processing

The processing of the 2013 International Visitors` Exit Survey data began after completion of the low season fieldwork. Data processing involved manual editing, coding of open-ended questions, data entry and editing of computer-identified errors. Data entry and editing were accomplished using the ORACLE11g database and web-based application.

XI. Tourist Expenditure Estimation

Tourists` expenditure in the country was estimated using Tourist Expenditure Model that was developed during the comprehensive International Visitors` Exit Survey conducted in 2001. The model uses the following variables in estimating tourists` expenditure: average expenditure by travel arrangement by purpose of visit, proportion of international tourist arrivals by travel arrangement and average length of stay. Data on average expenditure by travel arrangement by purpose of visit, proportion of international tourist arrivals by travel arrangement and average length of stay were obtained from the survey, while the number of international tourist arrivals was obtained from the Immigration Department.

The **model** is depicted in the following equation:

$$E_v = (E_p \times V_p \times T) + (E_{NP} \times V_{NP} \times T)$$

Whereby:

E_v = Total tourist expenditure in Tanzania.

E_p = Average package tour expenditure per visitor per night, derived from the survey.

E_{NP} = Average Non-package tour expenditure per visitor per night, derived from the survey.

V_p = Number of international tourist arrivals under **package** travel arrangement (The number of international tourist arrivals as recorded by the Immigration Department, adjusted into package

visitors by using package tour arrangement ratio derived from the survey).

V_{NP} = Number of international tourist arrivals under **Non-package** travel arrangement (The number of international tourist arrivals as recorded by the Immigration Department, proportionately adjusted into non-package visitors using the non-package tour arrangement ratio derived from the survey).

T = Average length of stay, derived from the survey.

The Simplified Model

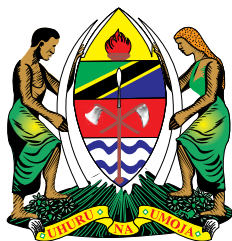
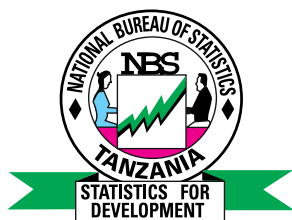
Country of Residence	Purpose of Visit	Total number of International Tourist Arrivals (sourced from Immigration Dept)	Number of International Tourist Arrivals by Travel arrangement		Average length of Stay (T)	Average Expenditure per Visitor per Night		Total Expenditure (E_V)
			Package (V_P)	Non-package (V_{NP})		Package (E_P)	Non Package (E_{NP})	
	Business							
	Holiday							
	VFR							
	Other							

Procedure and assumptions used for the estimation of tourist expenditure for 2013:

- Calculation of average package tour expenditure involved deduction of estimated cost for international fare to Tanzania and the commission accruing to an international tour wholesaler. Information on cost of international transport from source markets was updated using current information gathered from international carriers that bring visitors to Tanzania.
- It was assumed that 10 percent of the value of the package is retained by the international tour wholesaler to meet overhead costs and commission. The assumption was based on a study on Tourism Earnings in Tanzania that was conducted in 2000.

- Immigration data on the number of international tourist arrivals by purpose of visit were distributed according to the package and non-package arrangements using the travel arrangement ratios, as established in the survey.
- In order to be able to estimate annual tourists' expenditure, the survey's results were applied to the total number of international tourist arrivals, as recorded by the Immigration Department. It is worth mentioning that given the homogeneity nature of the visitors' characteristics, the information collected during the two weeks survey is justifiable to represent the total population.
- The Immigration Department also provided the number of international tourist arrivals for Zanzibar that enabled the estimation of tourists' expenditure for Zanzibar.
- The average length of stay used was between one and twenty-eight nights.

Appendix B: Questionnaire



THE 2013 INTERNATIONAL VISITORS' EXIT SURVEY

Please read the instructions carefully before filling the form.

INTRODUCTION

We hope that your stay in Tanzania was a pleasant one and a rewarding experience. Before you leave, you are kindly requested to provide information relating to your stay in Tanzania. The information will help us to improve and develop the tourism sector. The survey is jointly carried out by the Ministry of Natural Resources and Tourism, National Bureau of Statistics, Bank of Tanzania, Immigration Department and the Zanzibar Commission for Tourism.

Your Cooperation is highly appreciated

FOR OFFICIAL USE:

CODE NUMBER: _____

NAME OF THE RESEARCHER: _____

DATE: _____ SIGNATURE: _____

NAME OF THE DATA ENTRANT: _____

1. Nationality----- Country of Residence -----

2. What is your age group (tick one only)

- | | | | | |
|------|-------|-------|--------|-----|
| < 18 | 18-24 | 25-44 | 45 -64 | 65+ |
| [] | [] | [] | [] | [] |

3. Are you travelling alone? (Tick) Yes [] No [] If Yes go to question no. 6

4. With whom are you travelling? (tick one only)

- | | |
|----------------------------------|-----|
| With spouse/partner | [] |
| With children | [] |
| With spouse and children | [] |
| With other friends and relatives | [] |

5. What are ages of the people with whom you are travelling, whose expenditure is on one account, including children?

- | | | | | | |
|------------------|------|-------|-------|--------|-----|
| Age group | < 18 | 18-24 | 25-44 | 45 -64 | 65+ |
| Number of people | [] | [] | [] | [] | [] |

6. Gender	Number of Females	<input type="text"/>
	Number of Males	<input type="text"/>

7. Main purpose of visit to Tanzania (tick one only)

- | | | | |
|--------------------------------|-----|------------------------------|-----|
| Meetings and Conference | [] | Medical | [] |
| Business | [] | Scientific and Academic | [] |
| Visiting Friends and Relatives | [] | Volunteering | [] |
| Leisure and Holidays | [] | Other (please specify) | [] |

8. What was your main tourism activity in Tanzania, in this trip? (tick one only)

- | | | | |
|--------------------------|-----|--------------------------------|-----|
| Wildlife tourism | [] | Mountain climbing | |
| Beach tourism | [] | Hunting tourism | |
| Cultural tourism | [] | Conference tourism | [] |
| Bird watching | [] | Others (please specify): | [] |
| Diving and Sport Fishing | [] | | [] |

9. What was your main source of information about Tanzania (tick one only)

- | | | | |
|---------------------------------|-----|--|-----|
| Travel agent, tour operator | [] | Inflight magazines | [] |
| Friends, relatives | [] | Tanzania Mission Abroad | [] |
| Trade fair | [] | Radio, TV, Web (please specify): | [] |
| Newspaper, magazines, brochures | [] | Others (please specify): | [] |
| Travel agent, tour operator | [] | | [] |

10. Did you travel independently or booked a package tour? Tick one

(If you travelled independently, go to question 15)

Independent	Package
<input type="checkbox"/>	<input type="checkbox"/>

11. Items included in your package tour (tick)

- | | | | |
|---|-----|---------------------------------------|-----|
| International transport (Air ticket/fare) | [] | Sightseeing/excursion/game activities | [] |
| Accommodation | [] | Guided tour | [] |
| Food and Drinks | [] | Travel insurance | [] |
| Internal transportation in Tanzania | [] | Other (please specify)..... | [] |

12. Total cost of the package tour: Currency

13. Is the total cost for the whole group? (Tick) Yes [] No []

14. Total number of nights in the package tour
(INCLUDING nights spent in other countries)

15. Number of nights spent in: Tanzania Mainland
Zanzibar Island

16. How much money did you spend (cash, travellers cheque, credit cards) in Tanzania during this trip, Please give your best estimate in case you do not remember the exact figures.

Currency

17. Please give a breakdown of your expenditure in Tanzania on the following:

	Amount
Accommodation alone	
Hotel	Currency....
Others (Lodges, Motels, Campsites etc.)	Currency....
Food and drinks	Currency....
Internal transportation by:	
Air	Currency....
Road	Currency....
Water	Currency....
Railway	Currency....
Air	Currency....
Rentals (Car hires, Charters, Boats, etc)	Currency....
Cultural Services (Museums, Historical Sites, etc.)	Currency....
Sports and Recreational (Diving, cycling etc)	Currency....
Sight Seeing and Excursion	Currency....
Mountain Climbing	Currency....
Hunting	Currency....
Access/entry /gate fees	Currency....
Visa fees and Taxes	Currency....
Shopping	Currency....
Other (Please Specify).....	Currency....

18. Is the above breakdown for the whole party? (Tick) Yes [] No []

19. Which mode of payment did you use mostly in Tanzania?

Cash [] Traveller's Cheques []
 Credit Card [] Other (please specify) []

20. Have you travelled to other African countries? Yes [] No []

21. How did you find the cost of touring Tanzania as compared with other African countries?

Lower []
 Higher []
 Same []

22. Was this your first trip to Tanzania? (Tick) Yes [] No []

23. What impressed you most during your trip to Tanzania?

.....
.....
.....
.....

24. What would you consider the most important areas that need improvements?

.....
.....
.....
.....

*Thank you for your co-operation and for choosing Tanzania as your destination.
Have a pleasant trip.*

Appendix C: Statistical Tables

Table C1: Departure Points by Source Markets, 2013

Country of Residence	JNIA	KIA	AAKIA	NAM	MT	TUN	MANY
United States of America	14.3	43.4	3.8	34.3	0.9	0.3	5.0
United Kingdom	21.5	21.4	8.2	20.0	1.1	1.2	0.0
Italy	5.4	3.2	32.2	2.1	0.0	0.5	0.0
France	6.3	7.2	19.9	4.1	0.6	0.0	0.0
Germany	10.6	6.0	7.9	6.9	6.7	1.1	6.7
South Africa	7.3	1.9	9.4	0.8	4.1	2.3	1.7
Canada	4.6	6.4	2.7	4.9	0.3	0.0	0.0
Australia	3.1	3.6	3.6	15.3	0.0	0.0	8.3
Kenya	6.6	0.6	2.9	4.8	9.3	10.5	13.3
Uganda	1.9	0.4	0.8	0.1	75.0	1.5	58.3
Zambia	0.5	0.1	0.0	0.0	1.5	82.6	6.7
Spain	3.3	1.4	4.2	2.4	0.0	0.0	0.0
Sweden	3.9	2.0	2.8	0.9	0.3	0.0	0.0
Switzerland	5.2	1.2	1.4	1.7	0.0	0.0	0.0
India	5.6	1.2	0.3	2.0	0.2	0.2	0.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Table C2: Source Markets for Tanzania

Country of Residence	Number of Visitors	Percentage of Total
Kenya	193,078	17.6
United Kingdom	70,379	6.4
United States of America	69,671	6.4
Zambia	64,825	5.9
Italy	57,372	5.2
Germany	53,951	4.9
Rwanda	46,637	4.3
Uganda	39,488	3.6
Burundi	34,873	3.2
France	33,335	3.0
South Africa	31,144	2.8
Zimbabwe	30,765	2.8
India	27,334	2.5
Netherlands	20,633	1.9
Canada	20,188	1.8
Malawi	18,197	1.7
China	17,336	1.6
Australia	17,001	1.6
Mozambique	15,225	1.4
Spain	13,149	1.2
Congo	12,573	1.2
Sweden	12,503	1.1
Norway	12,386	1.1
Denmark	9,982	0.9
Belgium	9,157	0.8
Switzerland	8,827	0.8
Oman	8,697	0.8
Comoros	8,123	0.7
Japan	7,058	0.6
Austria	6,834	0.6
Russia	5,699	0.5

Country of Residence	Number of Visitors	Percentage of Total
Israel	5,344	0.5
Turkey	4,915	0.5
Korea (South)	4,815	0.4
Finland	4,590	0.4
Poland	4,334	0.4
Nigeria	3,963	0.4
Ireland	3,902	0.4
Pakistan	3,714	0.3
Czech	3,660	0.3
New Zealand	3,033	0.3
Brazil	2,926	0.3
Ukraine	2,901	0.3
Philippines	2,109	0.2
Egypt	2,053	0.2
Portugal	2,049	0.2
Ethiopia	1,983	0.2
Sri Lanka	1,976	0.2
Ghana	1,871	0.2
U.A.E	1,812	0.2
Romania	1,560	0.1
Kazakhstan	1,509	0.1
Slovenia	1,382	0.1
Sudan	1,301	0.1
Berigin	1,293	0.1
Syria	1,238	0.1
Namibia	1,203	0.1
Malaysia	1,189	0.1
Uzbekistan	1,160	0.1
Botswana	1,152	0.1
Nepal	1,056	0.1
Yemen	1,019	0.1
Argentina	990	0.1

Country of Residence	Number of Visitors	Percentage of Total
Cameroon	988	0.1
Mexico	960	0.1
Singapore	958	0.1
Congo (Brazaville)	919	0.1
Swaziland	886	0.1
Taiwan	881	0.1
Somalia	869	0.1
Afghanistan	860	0.1
Indonesia	843	0.1
Hungary	843	0.1
Jordan	837	0.1
Angola	811	0.1
Morocco	791	0.1
Saudi Arabia	791	0.1
Burkina Faso	787	0.1
Iran	769	0.1
Colombia	767	0.1
Slovakia	759	0.1
Greece	757	0.1
Mauritius	754	0.1
Madagascar	715	0.1
Iceland	714	0.1
Thailand	687	0.1
San Marino	678	0.1
Estonia	634	0.1
Bulgaria	627	0.1
Croatia	606	0.1
Chile	604	0.1
Lesotho	589	0.1
Bangladesh	583	0.1
Ivory Coast	577	0.1
Belarus	518	0.1

Country of Residence	Number of Visitors	Percentage of Total
Seychelles	506	0.1
Benin	505	0.1
Lithuanian	498	0.1
Lebanon	483	0.0
Tunisia	479	0.0
Senegal	479	0.0
Guinea	470	0.0
Serbia	470	0.0
Uruguay	437	0.0
Gabon	420	0.0
Gambia	417	0.0
Djibouti	412	0.0
Liberia	404	0.0
Algeria	403	0.0
Palestina	393	0.0
Korean (North)	387	0.0
Siera Leone	365	0.0
Togo	336	0.0
Luxembourg	319	0.0
Latvia	314	0.0
Mauritania	312	0.0
Mali	292	0.0
Nicaragua	285	0.0
South Sudan	270	0.0
Albania	269	0.0
Ecuador	265	0.0
Dominica	263	0.0
Kuwait	255	0.0
Cuba	247	0.0
Jamaica	244	0.0
Hellenic	241	0.0
Cambodia	224	0.0

Country of Residence	Number of Visitors	Percentage of Total
Venezuela	223	0.0
Bosnia	218	0.0
Peru	215	0.0
Libya	214	0.0
Georgia	207	0.0
Trinidad	205	0.0
Macedonia	198	0.0
Costa Rica	178	0.0
Niger	175	0.0
Hong Kong	170	0.0
Bahrain	165	0.0
Central Africa	165	0.0
Cypriot	163	0.0
Armenia	155	0.0
Maltese	148	0.0
Vietnam	143	0.0
Moldovia	141	0.0
St.Kitts & Devis	139	0.0
Fiji	135	0.0
Bolivia	128	0.0
Azerbaijan	117	0.0
Cape Verde	112	0.0
Chad	110	0.0
Guatemala	106	0.0
Tajikstan	104	0.0
Eritrea	102	0.0
Iraq	101	0.0
Honduras	93	0.0
Suriname	88	0.0
Qatar	84	0.0
Myanmar	82	0.0
Haitia	75	0.0

Country of Residence	Number of Visitors	Percentage of Total
Panama	66	0.0
St. Laurencia	59	0.0
Mongolia	56	0.0
Stateless	52	0.0
Papua New Guinea	47	0.0
Paraguay	42	0.0
El-Salvador	41	0.0
Antigua	40	0.0
Liechtestein	36	0.0
Solomon	36	0.0
Guyana	31	0.0
St.Lucia	30	0.0
Andorra	29	0.0
Sao Tome	29	0.0
Barbados	28	0.0
Bruney	28	0.0
Guinea Bissau	26	0.0
Bahama	24	0.0
Monecasque	23	0.0
Maldives	19	0.0
Kyrgyz	12	0.0
Grenada	4	0.0
Bhutan	3	0.0
Belize	2	0.0
St. Peirre	1	0.0
Total	1,095,885	100.0

Source: Immigration Department

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