The 2021 International Visitors' Exit Survey Report

Ministry of Natural Resources and Tourism (MNRT)
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Zanzibar Commission for Tourism (ZCT)
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TANZANIA TOURISM SECTOR SURVEY

THE 2021 INTERNATIONAL VISITOR'S EXIT SURVEY REPORT

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ABBREVIATIONS AND ACRONYMS

AAKIA	Abeid Amani Karume International Airport
BOT	Bank of Tanzania
GDP	Gross Domestic Product
HAT	Hotel Association of Tanzania
HAZ	Hotel Association of Zanzibar
ILO	International Labour Organization
JNIA	Julius Nyerere International Airport
KAS	Kasumulo
KIA	Kilimanjaro International Airport
LGAs	Local Government Authorities
MANY	Manyovu
MFAEAC	Ministry of Foreign Affairs and East Africa Cooperation
MICE	Meetings, Incentives, Conference and Exhibitions
MICIT	Ministry of Information, Communication and Information Technology
MICT	Ministry of Infrastructure, Communication and Transportation - Zanzibar
MNRT	Ministry of Natural Resources and Tourism
MTH	Ministry of Tourism and Heritage
MTK	Mtukula
MWTC	Ministry of Works, Transport and Communication
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
TSA	Tourism Satellite Account
TTB	Tanzania Tourist Board
TUN	Tunduma
UNWTO	United Nations World Tourism Organization
URT	United Republic of Tanzania
VFR	Visiting Friends and Relatives
ZAA	Zanzibar Airport Authority
ZATI	Zanzibar Association of Tourism Investors
ZATO	Zanzibar Association of Tour Operators
ZCT	Zanzibar Commission for Tourism
ZIPA	Zanzibar Investment Promotion Authority

GLOSSARY

Arrivals: number of visitors reaching a destination, regardless of duration.

Attractions: places, people, events and things that offer leisure and amusement to tourists at a destination.

Average length of stay: average number of nights that a visitor spends at a destination.

Balance of payments: a statistical statement that summarizes for a specific time period, all economic transactions between residents and non-residents. It consists of current account, capital account, and financial account.

Commissions: percent of the total product cost paid to travel agents and other travel product distributors for selling the product or service to the consumer.

Country of reference: the country for which the measurement is done.

Cultural tourism: type of tourism related to a country or region's culture, specifically the lifestyle, history, art, architecture, religion(s), and other elements that shape their way of life.

Demographic characteristic: personal information about customers such as age, income and gender, used to understand the customers' buying or selling preferences.

Destination: the place visited that is central to the decision to take the trip.

Domestic tourism trip: main destination within the country of residence of the visitor.

Domestic tourism: comprises activities of a resident visitor within the country of reference either as part of a domestic tourism trip or part of an outbound tourism trip.

Domestic visitor: a visitor who travels within his/her country of residence.

Establishment: an enterprise, or part of an enterprise, that is situated in a single location and in which only a single productive activity is carried out or in which the principal productive activity accounts for most of the value added.

Excursionist: non-resident visitor arriving and leaving a country the same day, also called same-day visitor.

High season: the period of the year when occupancy/usage of accommodation facilities is the highest.

Inbound tour operator: tourism business operator who serves visitors arriving from abroad.

Inbound tourism: comprises the activities of a non-resident visitor within the country of reference.

Independent tour/non-package tour: self-travel arrangement which does not include pre-arrangements and services are purchased at host's destination.

Long haul visitor: visitors coming from far afield, usually where the flight from the destination is more than three hours.

Low season: the period of the year when occupancy/usage of accommodation facilities is the lowest.

Outbound operator: a tourism business operator who serves visitors arriving from abroad.

Package tour: pre-arranged trip done outside the country with a combination of elements such as air travel, hotel, sightseeing, and social events put together and sold at an all-inclusive price in a single transaction.

Place of usual residence: the geographical place where a visitor usually resides and is defined by the location of his/her principal dwelling.

Purpose of visit: the purpose in the absence of which the trip would not have taken place.

Recreation: an activity of leisure that people do in their free time for rest and relaxation.

Sample: a subset of a frame where elements are selected based on a process with a known probability of selection.

Tour operator: a person who designs, develops markets and operates packaged travel and tourism products and tours.

Tourism diversification: is the process of developing new tourism products and market, in order to achieve business growth.

Tourism expenditure: amount paid for the purchase of goods and services, for and during tourism trips. It includes expenditure by visitors as well as expenses that are paid for or reimbursed by others.

Tourism Satellite Account: recommended methodological framework that has been developed in order to present economic data relative to tourism within a framework of internal and external consistency with the rest of the statistical system through its link to the System of National Accounts.

Travel agent: a person engaged in selling and arranging transportation, accommodations, tours, or trips for travelers.

Travel Party: people travelling together, but not necessarily from the same permanent residence.

Trade Show/tourism Show: a tourism event usually involving exhibitions of tourism products and destinations. It is an event, which provides a unique opportunity to display tourism products and services, meet, network, negotiate and conduct business with domestic and international tourism stakeholders.

Visitor Experience: Sum of all perceptions, senses stimulated, emotions evoked and interactions travelers have with the people, places and cultures of a destination, the communities and the businesses they encounter.

FOREWORD

As we present the findings of the 21st Round of the International Visitors' Exit Survey, we are glad to inform you that in 2021 Tanzania's tourism sector continued to recover from the challenges posed by the COVID-19 pandemic; thanks to the ongoing normalization of the global economy, and measures taken by the governments and key stakeholders to diversify and market our attractions. Partly due to these efforts, the country's major attraction sites continued to feature top in the international billboards as the best destinations to visit.

Indeed, we witnessed an increasing number of international visitors into our treasured country, Tanzania. Notably, a good chunk of them came from EAC and SADC regions, which is good news for enhancing the industry's resilience to shocks emanating from outside Africa. In 2021, the number of international visitors rose by almost a half (48.6 percent) from the level recorded a year earlier, the year that was hit hard by the COVID-19 pandemic. In reflection, foreign exchange earnings nearly doubled to USD 1,310.3 Million from USD 714.5 million recorded in 2020.

We are convinced that this good performance will carry on in 2022, partly as the global economic environment continues to normalize supported by the scaled-up vaccinations and easing of travel restrictions in many economies. Equally important are the conducive domestic macroeconomic environment and enhanced efforts to market Tanzania as the ultimate tourism destination. For this to happen, we wish to reiterate our call for all actors in the tourism industry and outside to join hands in addressing the challenges facing the tourism sector as underscored in the 21st Visitors' Exit Survey Report.

We believe you will find this report useful. This is yet another product of the collaborative engagement between the Ministry of Natural Resources and Tourism, Bank of Tanzania, National Bureau of Statistics, Immigration Services Department and the Zanzibar Commission for Tourism.

Mohamed O. Mchengerwa (MP.)
MINISTER OF NATURAL RESOURCES AND TOURISM

ACKNOWLEDGEMENT

The Steering Committee of the Tanzania Tourism Sector Survey would like to acknowledge and express appreciation for the support provided by all institutions, individuals and visitors that made it possible to accomplish this task as planned.

We are indebted to the Chief Executive Officers of the collaborating institutions for their committed guidance and support. These are the Ministry of Natural Resources and Tourism (MNRT), Bank of Tanzania (BOT), National Bureau of Statistics (NBS), Immigration Services Department (ISD), Zanzibar Commission for Tourism (ZCT), and the Tourism Confederation of Tanzania (TCT).

Our sincere appreciations also go to Mr. Phillip Chitaunga, MNRT; Dr. Suleiman Missango, BOT; Mr. Daniel Masolwa, NBS; Ms. Sophia Gunda, ISD; Dr. Miraji Ussi, ZCT, for tirelessly supervising the survey and ultimately coming up with this report.

Last but not least is the technical bench led by Mr. Paskasi Mwiru (MNRT) and Ms. Villela Waane (BOT). Other members are Phillip Mboya, Tumaini Longishu, Eliya Jairo, Taimur Hussein, Rweyemamu Barongo from BOT; Josephat Msimbano from MNRT; Valerian Tesha, Eliaranya Lema and Jovitha Rugemalila from NBS; Philimon Msenya from ISD; and Maabad Jaffar from ZCT.

EXECUTIVE SUMMARY

This report provides a summary of domestic and global tourism developments. It also covers the findings of the 21st cycle of the international visitors' exit survey that was conducted in 2021.

Global tourism developments

Globally tourism continued to recover owing to rising rates of COVID-19 vaccination and easing of travel restrictions. UNWTO World Tourism Barometer of July 2022 points to a 5.8 percent increase in the international arrivals to 429 million in 2021 from 406 million arrivals a year earlier. Despite the recovery, the number is still below the pre-pandemic levels.

Tourism developments in Tanzania

Reflecting the global tourism recovery, the number of international visitors to Tanzania rose by 48.6 percent to 922,692 in 2021 from 620,867 recorded in 2020. In response, foreign exchange earnings from tourism increased by 83.4 percent to USD 1,310.3 million in 2021 from USD 714.5 million a year earlier. Tanzania's tourism prospects for 2022 are positive, premised on the favorable global tourism outlook and measures taken to market the country's tourism attractions. As a positive gesture, Serengeti National Park has featured again on Cloud 9 as the best national park in Africa outcompeting six other national parks from Africa in the World Travel Awards (WTA) 2021.

Some of the initiatives and conditions that contributed positively to tourism growth in 2021 include:

i. Regional engagements; Tanzania hosted the East African Regional Tourism EXPO (EARTE) held for the first time in October 2021.

ii. Establishment of the Zanzibar Holiday Market Festival in 2021, which is an annual event aimed at showcasing the country's tourism products and opportunities.

iii. Launching of new airline routes to Tanzania despite the difficulties posed by COVID-19 pandemic.

iv. Establishment of Hotel Association of Zanzibar in 2021 with the objective of promoting national tourism growth strategies and creating a critical economic engine to continuously improve the quality of visitors' experience.

v. Inauguration of Zanzibar Tourism Diplomatic Police by His Excellency, Dr. Hussein Ali Mwinyi, the President of the Revolutionary Government of Zanzibar, to guarantee tourists' safety while in Zanzibar, hence positively branding the Islands' tourist attractions.

vi. Building of Africa's 2nd tallest skyscraper and largest hotel in East and Central Africa in Zanzibar that is expected to change considerably the face of the Indian Ocean archipelago.

vii. Launching of the Royal Tour, whereby, Her Excellency, Samia Suluhu Hassan, the President of the United Republic of Tanzania, recorded a famous program aimed at marketing and promoting Tanzania's tourism products and services internationally. Efforts by actors to conserve the natural attractions; this is instrumental in preserving the sustainability of the industry.

viii. Conducive macroeconomic condition.

Main findings of the 21st cycle of tourism exit survey

i. The top 15 source markets in 2021 accounted for 82 percent of all visitors compared to 76.6 percent in 2020. Majority of visitors were from France, the United States of America and Kenya. France topped the list, surpassing other traditional source markets namely the United States of America, Kenya and the United Kingdom.

ii. The majority of the visitors under all age groups came for leisure and holidays, followed by those who came to visit friends and relatives and for business purposes.

iii. The majority of visitors came under the non-package tour arrangement. Visitors from the United States of America, South Africa and Germany mainly came under the package tour arrangement, while visitors from the neighbouring countries such as Burundi, Zambia and Uganda ranked high in the non-package tour arrangement.

iv. The overall average length of stay was 10 nights in 2021. The trend remained unchanged for the last nine years. Visitors from Germany stayed the longest with an average of 18 nights. These results are consistent with the previous findings, whereby visitors from long haul source markets stayed the longest. Visitors from Zimbabwe, Kenya and Zambia stayed the least amount of days with an average of less than 9 nights. In Zanzibar, the overall average length of stay was 8 nights, an increase of 1 night from 2020.

v. The overall average expenditure per person per night increased by 31 percent to USD 199 from USD 152 recorded in 2020. Visitors who came under the package tour spent the highest with an average of USD 364, while those who came under the non-package arrangement spent an average of USD 141. Business visitors spent the most with an overall average expenditure of USD 313 per person per night, followed by holidaymakers. In Zanzibar, overall average expenditure per person per night was USD 199, with package tour visitor spending an average of USD 292 and non-package visitor USD 163.

vi. Number of international visitors increased by 48.6 percent to 922,692 in 2021 from 620,867 recorded in 2020. Consequently, tourism earnings increased by 83.4 percent to USD 1,310.3 million in 2021 from USD 714.5 million in 2020.

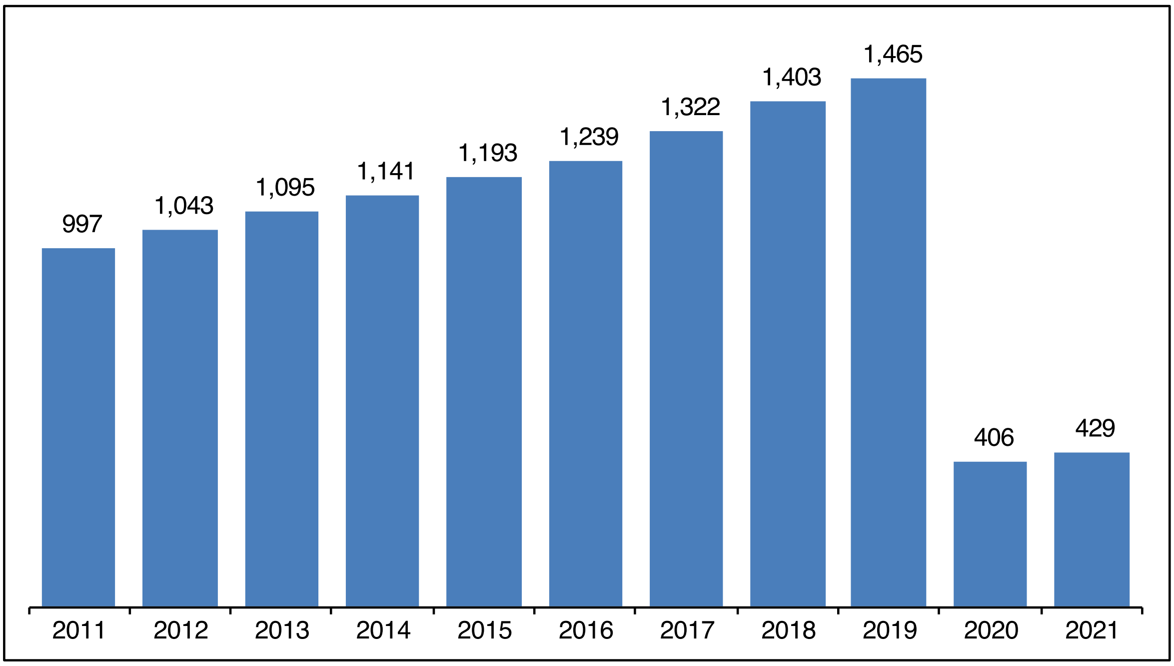
Chapter 1: Recent Developments in the Tourism Industry

1.1 Global Perspective

International tourism rebounded moderately during 2021, with international arrivals increasing by 5.8 percent, contributed by the rising rates of vaccination, combined with easing of travel restrictions due to increased cross-border coordination and protocols. The pace of recovery however, remains slow and uneven across regions due to varying degrees of mobility restrictions, vaccination rates and traveler confidence.

Chart 1.1: Global International Tourist Arrivals, 2011-2021

In Millions



Source: UNWTO Barometer 2022 (July issue)

According to the UNWTO Barometer, Europe and the Americas recorded the strongest results in 2021 compared to 2020, but both were still 62 percent below the pre-pandemic levels. Africa saw a 3.3 percent increase in arrivals in 2021 compared to 2020, albeit below the 2019 arrivals by 72 percent. Conversely, arrivals in the Middle East declined by 6.2 percent compared to 2020. In Asia and the Pacific, arrivals were 65 percent below 2020 levels and 94.3 percent when compared to pre-pandemic values as many destinations remained closed to non-essential travel.

Table 1.1: International Tourist Arrivals by Regions 2016 – 2021

Percentage change

Region	2016	2017	2018	2019	2020	2021
World	3.8	7.2	5.6	3.8	-72.3	5.8
Europe	2.0	8.8	5.8	3.7	-68.0	21.1
Asia and Pacific	7.7	5.7	7.3	4.6	-83.5	-65.1
Americas	3.7	4.7	2.4	2.0	-68.2	18.1
Africa	7.8	8.5	8.5	4.2	-72.5	3.3
Middle East	-47.0	4.1	3.0	7.6	-72.9	-6.2

Source: UNWTO World Tourism Organization Barometer, July 2022

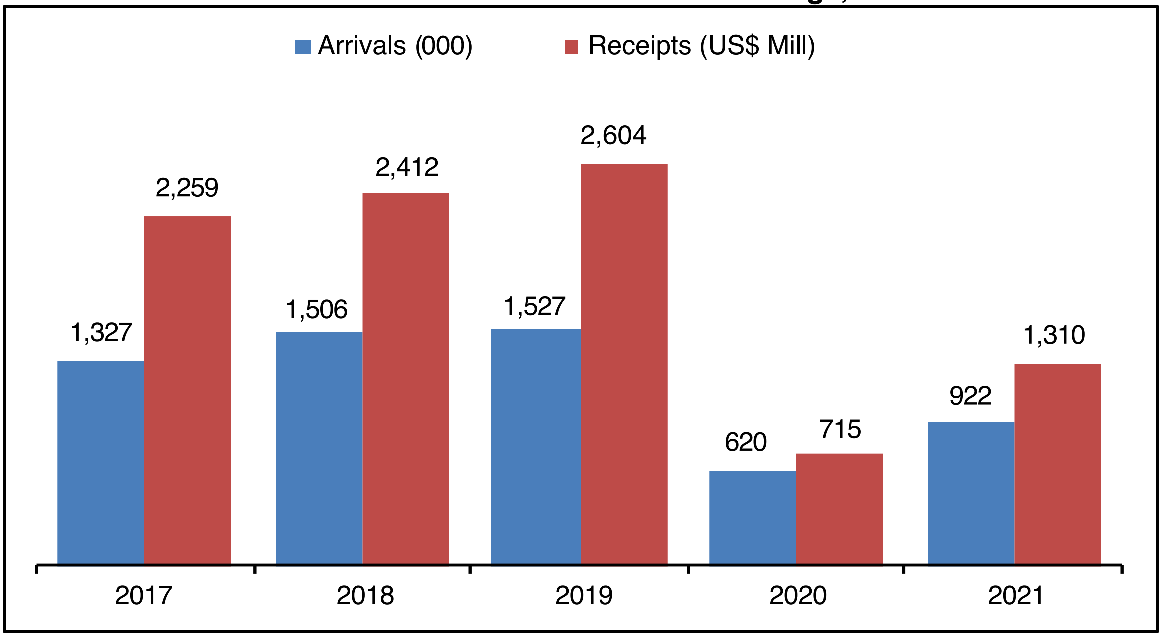
The UNWTO barometer showed that, international tourism receipts reached USD 602 billion, 4 percent higher than in 2020. Europe and the Middle East recorded the best results, with earnings climbing to about 50 percent of the pre-pandemic levels in both regions. Total export revenues from tourism (including passenger transport receipts) reached an estimated USD 713 billion in 2021, a 4 percent increase from 2020, but still 61 percent below 2019 levels. However, the amount being spent per trip per person is on the rise - from an average of USD 1,000 in 2019 to USD 1,400 in 2021.

1.2 Tanzania's Perspective

1.2.1 Tourism Performance

Despite the global economic downturn of recent years caused by COVID-19 pandemic, Tanzania's tourism sector has shown improvement both in terms of supply and demand. The improvement is partly contributed by the measures taken by the governments and other actors to improve the tourism sector in the country, targeting among other things, products diversification and quality improvement, as well as marketing of tourism attractions abroad. The number of international visitors to the country increased by 48.6 percent to 922,692 in 2021 from 620,867 recorded in 2020, contributing to increase in tourism earnings by 83.4 percent to USD 1,310.3 million from USD 714.5 million. Tanzania's tourism prospects for 2022 are positive, hinging on the favorable global tourism outlook and measures taken to market the country's tourism attractions. Downward risks however, largely originate from the geopolitical tensions including the war in Ukraine and the associated supply chain disruptions. Chart 1.2 depicts Tanzania's international arrivals and earnings for the period 2017-2021.

Chart 1.2: Global International Tourist Arrivals and Earnings, 2017-2021



Signaling a positive outlook, Serengeti National Park featured again on Cloud 9 as the best national park in Africa, outcompeting six other national parks from Africa in the World Travel Awards (WTA) 2021. The other competitors were Central Kalahari Game Reserve (Botswana), Etosha National Park (Namibia), Kidepo Valley National Park (Uganda), Kruger National Park (South Africa) and Maasai Mara National Reserve (Kenya). Serengeti was named Africa's Leading National Park for the third time in a row for its Wildebeest migration and a vast plain that accommodates millions of wildlife including the Big 5.

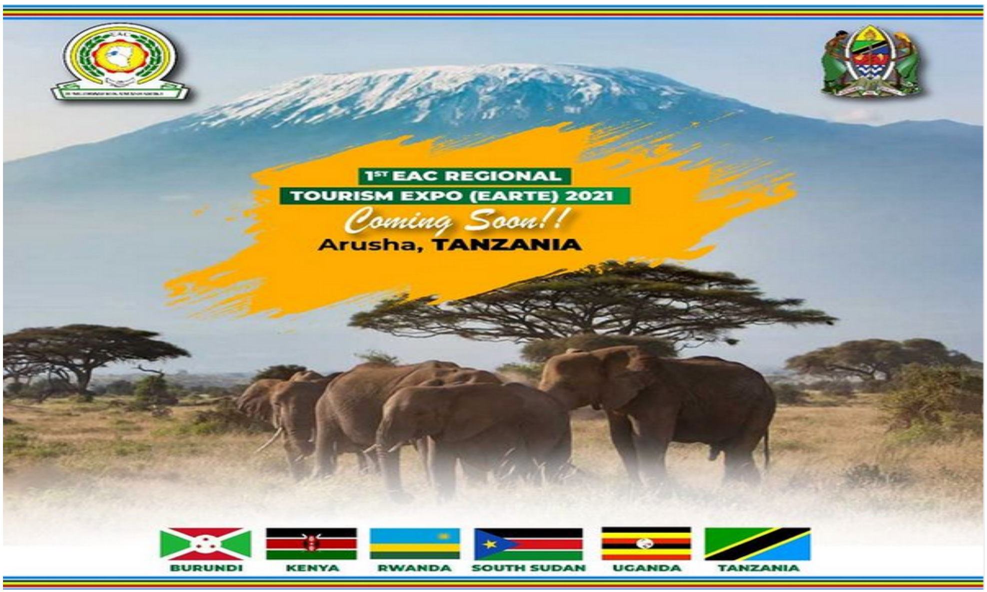
With respect to conservation, the World Travel Awards recognized Ngorongoro Crater and Mount Kilimanjaro as leading conservation destinations in Africa. Other awards won under different categories include Africa's leading destination (Tanzania); Africa's leading beach destination (Zanzibar); Africa's leading green hotel (Hotel Verde); Africa's leading luxury island (Thanda Island, Zanzibar); Africa's leading luxury safari lodge (Four Seasons Safari Lodge Serengeti) and Africa's leading private island (Chapwani Island, Zanzibar).

The initiatives that contributed favorably to tourism growth in 2021 include:

i. **Tourism and Trade Exhibitions/Shows**

*a. **Tanzania hosted the 1st EAC Regional Tourism EXPO (EARTE) in 2021***

The EXPO aimed at promoting tourism attractions available in the EAC region and involved familiarization trips and tours to major attraction sites. The EXPO will be held on a rotational basis with this year's theme being: "Promoting resilient tourism for inclusive socio-economic development". The event is a platform for business to business (B2B) engagement and dialogue with a view to spur recovery of the tourism sub sector by bolstering intra-regional tourism related trade. The 2021 EXPO attracted more than 100 exhibitors with 3,000 visitors.



1st Tourism EXPO 2021

b. Zanzibar Holiday Market Festival

The Zanzibar Association of Tour Operators (ZATO) in collaboration with other key stakeholders established an annual Zanzibar Holiday Market Festival aimed at showcasing Zanzibar's tourism products and opportunities. The event took place for the first time in May 2021 and attracted more than 100 exhibitors from over 20 countries.

Hon. Omar Said Shaaban, Minister for Trade and Industrial Development during the official opening of Zanzibar Holiday Market Festival.

ii. New Airline Routes

Despite the difficulties posed by the Corona virus, some airlines launched new routes to Tanzania. The new routes include: Eurowings Discover (Frankfurt) which operates twice a week from Frankfurt to Mombasa and Zanzibar, effective March 31st, 2021; Edelweiss flight (Switzerland), which flies twice a week from Zurich to Kilimanjaro International Airport and Zanzibar, effective from 8th October 2021; Air France (France) operating twice a week to Zanzibar, effective from 18th October 2021; and Global Airways-Africa Stay (Johannesburg) which flies once a week to Zanzibar, effective from 19th September 2021.

iii. Establishment of Hotel Association of Zanzibar (HAZ)

Hotel Association Zanzibar (HAZ) becomes the fourth Tourism Association established in Zanzibar, with the objective of promoting national tourism growth strategies and create a critical economic engine to continuously improve the quality of visitors' experience. The occasion took place at Zanzibar Serena Hotel on 18th October 2021, graced by His Excellency, Hemed Suleiman Abdulla the Second Vice President of Zanzibar, who represented His Excellency, Dr. Hussein Ali Mwinyi, the President of Revolutionary Government of Zanzibar and the Chairman of the Revolutionary Council. Other stakeholders include banks, hoteliers, tour operators and airlines. HAZ will be the principal voice of all hotels in Zanzibar on issues pertaining to the sector's engagement with the government and other agencies. Other three tourism association in Zanzibar are: Zanzibar Association of Tourism Investors (ZATI), Zanzibar Association of Tour Operators (ZATO) and Zanzibar Association Tour Guides (ZATOGA).

Ceremony to launch the Hotel Association of Zanzibar, at Serena Hotel in Zanzibar

iv. Inauguration of Zanzibar Tourism Diplomatic Police

The President of the Revolutionary Government of Zanzibar, His Excellency, Hussein Ali Mwinyi launched Zanzibar Tourism Diplomatic Police unit on 19th November 2021. The Unit is intended to ensure peace and security of visitors touring Zanzibar. The President of the Revolutionary Government of Zanzibar, His Excellency, Dr. Hussein Ali Mwinyi has officiated the inauguration of the special police unit, that aimed ensuring tourists visiting Zanzibar are secured and serve as goodwill ambassadors of the Islands' tourist attractions. The 150 tourism police unit inaugural occasion took place at the Ministry of Tourism and Heritage, Mnazi Mmoja on 19th November 2021, witnessed by various tourism stakeholders and other Government's officials. The Zanzibar Diplomatic Police Unit intends to guarantee the security of the visitors, as peace and security are key factors that visitors consider in the selection of a destination.

His Excellency, Dr. Hussein Ali Mwinyi, the President of the Revolutionary Government of Zanzibar during the official launch of Tourism Police Unit

v. Construction of Africa's Second Tallest Skyscraper and Largest Hotel in East and Central Africa in Zanzibar

Zanzibar signed a contract with the New York and Dubai-based design architect company X Cassia in August 2021, to build a commercial tower that will completely change the face of the semi-autonomous Indian Ocean archipelago. The signing occasion was graced by Zanzibar's Minister for State, President's Office, Economy and Investment, Mr. Mudrik Ramadhan Soraga. The project is a joint venture of Tanzania's AICL Group and Scotland's Edinburgh Crow Land Management Ltd, that came up with architectural designs for the largest hotel in East and Central Africa. When completed, the 70-floor commercial tower linked by a high and low bridge structure will be the tallest skyscraper in East and Central Africa, and second tallest in Africa, behind Egypt's Iconic Tower. The tower will be called Zanzibar Domino Commercial Tower, expected to be one of the international iconic features, facilitating tourism, culture, and business opportunities. The construction of the tower is expected to be in phases, to be undertaken in a period of four years.

The outlook of Zanzibar Domino Commercial Tower

vi. The Royal Tour

The President of the United Republic of Tanzania, Her Excellency, Samia Suluhu Hassan commenced recording of the famous documentary dubbed Royal Tour, aimed at marketing and promoting Tanzania tourism products and services internationally in August 2021. The tour started in Zanzibar Isles, moved to the Tanzania Mainland coast of Bagamoyo, then to the Tanzanite Mines in the Mirerani Hills of Simanjiro and Africa's highest peak, Mount Kilimanjaro. The Royal Tour continued to Arusha City, Manyara National Park, Karatu Township, the Ngorongoro Crater, Serengeti National Park, the Lake Victoria Zone and cultural centres in Mwanza. The programme is part of the government's robust strategies to brand the country through promotion of available economic opportunities, tourist attractions and investment after the sector was badly hit by the COVID-19 pandemic. The documentary was officially launched in the first half of 2022 and featured in numerous international media outlets.

Her Excellency, Samia Suluhu Hassan, the President of the United Republic of Tanzania and His Excellency, Dr. Hussein Ali Mwinyi, the President of the Revolutionary Government of Zanzibar during the shooting of Royal Tour in Zanzibar

vii. Macroeconomic Condition

The economy is in a good condition and gradually recovering from the COVID-19 pandemic. It navigated the pandemic successfully with a positive growth at the time many economies slumped into a recession. In 2021, the economy grew at 4.9 percent, driven by agriculture, construction, mining and quarrying and manufacturing. Inflation remained low and stable at 3.7 percent in 2021, a slight increase from 3.3 percent in 2020, and within EAC and SADC convergence criteria of at most 8.0 percent and between 3.0 and 7.0 percent, respectively. The shilling remained stable against major trading currencies supported by moderate current account balance, sustained low inflation, prudent monetary and fiscal policies and measures taken to improve transparency and order in the foreign exchange market operations. In 2022, the pace of growth of the economy was expected to be high at around five and a half, but rising commodity prices in the world market (largely due to the war in Ukraine and occurrences of COVID-19 variants) and rising interest rates in advanced economies have been causing hindrances. These global shocks have led to downward revision of growth projection to 4.7 percent.

Chapter 2: Results of the 21st International Visitors' Exit Survey

2.1 Introduction

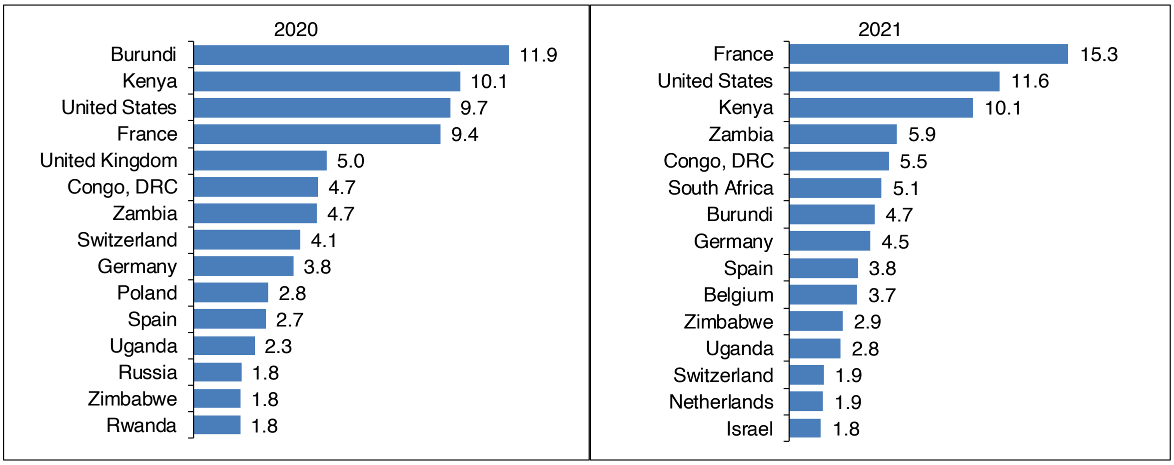
This chapter presents key findings from the international visitors' exit survey conducted in 2021, during the tourist peak season. It provides an assessment along the key attributes of policy interest including tourist source markets, age, gender, purpose of visits, travel arrangements, length of stay and expenditure pattern. Recorded here also is feedback on the visitors' impression as well as areas that need improvement.

2.2 Source Markets

About 82 percent of the visitors in 2021 came from the top 15 source markets compared to 76.6 percent in 2020. In 2021, France led by accounting for 15.3 percent, followed by the United States of America and Kenya. France surpassed other traditional source markets namely, the United States of America, Kenya, Germany, and Spain. The top 15 source markets recorded new entrants namely, South Africa, Belgium, Netherlands, and Israel that replaced the United Kingdom, Poland, Russia and Rwanda recorded in 2020 (**Chart 2.1).** Changes in the position of the neighboring countries in 2021 reflects an increasing number of arrivals from the traditional markets indicating the recovery of the tourism sector from the COVID-19 pandemic.

Chart 2.1: Top 15 Source Markets for the URT

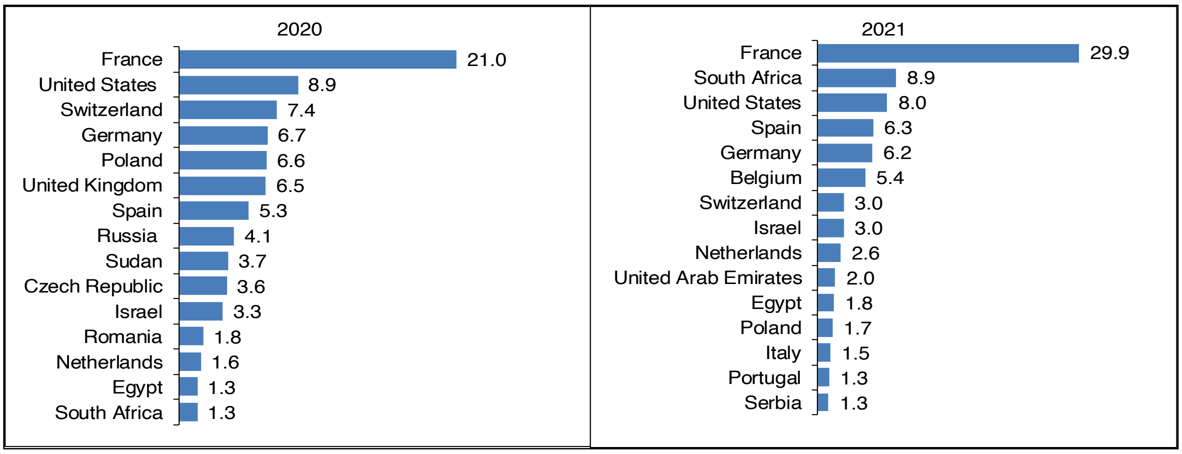
Percent



In Zanzibar, the top 15 source markets accounted for 82.9 percent of all visitors in 2021 compared to 83.1 percent in 2020. In both years, France continued to lead, with the United Arab Emirates replacing the United Kingdom on the list (**Chart 2.2**). The improvement of South Africa to the second position in 2021 is partly attributed to the introduction of weekly flights from Johannesburg by Global Airways Africa Stay. Italy, one of the big sources markets for Zanzibar is slowly regaining its position following the lift of travel restrictions. Noteworthy, Italy did not appear in the list of the 15 top source markets in 2020 as it was among the countries hit hard by the COVID-19 pandemic.

Chart 2.2: Top 15 Source Markets for Zanzibar, 2020 and 2021

Percent

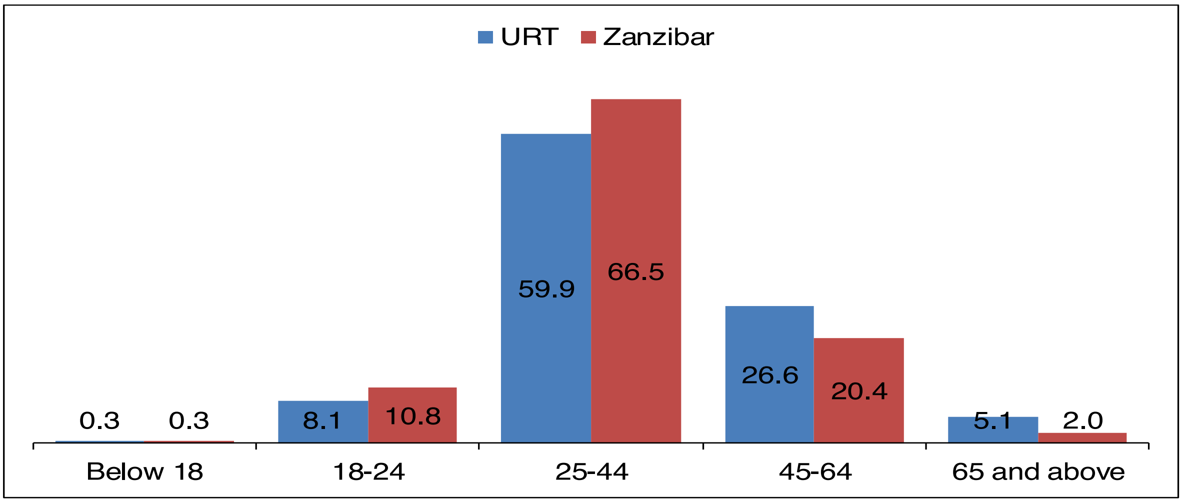


2.3 Age Group

Normally, travel making decisions increase with the active age and decreases with higher age, partly because the elder population do not desire to have foreign and financially draining holidays, while the active age prefer exotic travelling due to explorative and adventurous mindsets. Reflecting this, the majority of visitors to both URT and Zanzibar were aged between 25 and 44 years accounting for 59.9 and 66.5 percent, respectively. Visitors aged below 18 accounted for the smallest share. Similar patterns were observed in the preceding surveys.

Chart 2.3: Distribution of Visitors by Age Group

Percent



Visitors in the age groups of 25-44 and 45-64 for URT, mainly came from France, United States of America and Kenya. More than half of the elderly visitors came from the United States followed by France (**Table 2.1**).

Table 2.1: Age Group by Top 15 Source Markets, URT

Percent

	Age group				
Country of residence	Below 18	18-24	25-44	45-64	65 and above
France	13.2	29.9	22.1	10.0	13.1
United States	7.2	5.2	10.1	19.1	50.2
Kenya	17.8	11.5	11.3	15.8	7.7
Zambia	3.3	3.3	8.5	7.7	1.0
Congo, DRC	3.9	2.3	7.1	8.8	1.5
South Africa	13.8	5.6	5.7	7.3	5.0
Burundi	11.8	7.1	6.0	4.4	3.7
Germany	1.3	6.5	4.0	8.9	4.7
Spain	2.6	3.0	6.3	2.2	1.2
Belgium	1.3	13.7	3.7	3.6	4.2
Zimbabwe	0.7	0.9	4.7	3.1	0.5
Uganda	6.6	4.1	3.8	2.9	1.2
Switzerland	2.0	2.1	2.5	1.9	2.7
Netherlands	1.3	2.1	2.4	2.2	1.5
Israel	13.2	2.6	1.8	2.0	1.7
Total	100.0	100.0	100.0	100.0	100.0

In Zanzibar, visitors in the age group of 25-44 mainly came from France and Spain, while those in the age of 45-64 mainly came from France, South Africa and Germany (**Table 2.2**).

Table 2.2: Age Group by Top 15 Source Markets, Zanzibar

Percent

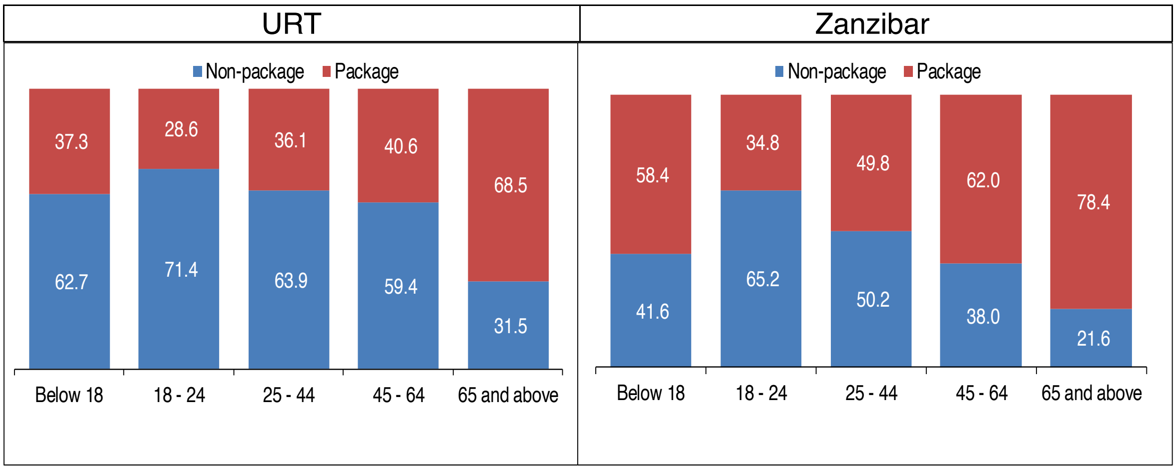
	Age group				
Country of residence	Below 18	18-24	25-44	45-64	65 and above
France	20.0	45.1	39.4	24.0	22.1
South Africa	23.8	8.7	9.4	14.8	14.0
United States	2.5	2.2	8.4	17.7	24.4
Spain	5.0	3.9	9.6	4.3	2.3
Germany	2.5	8.0	5.7	14.1	9.3
Belgium	2.5	11.2	6.0	4.8	11.6
Israel	16.3	3.6	2.8	4.2	5.8
Switzerland	2.5	2.7	3.6	4.3	3.5
Netherlands	2.5	2.4	3.5	2.9	0.0
United Arab Emirates	1.3	1.2	2.8	1.9	2.3
Egypt	0.0	1.9	2.9	0.3	1.2
Poland	7.5	1.5	2.1	1.8	0.0
Italy	1.3	5.1	1.2	1.3	3.5
Portugal	7.5	1.2	1.6	1.1	0.0
Serbia	5.0	1.2	1.1	2.4	0.0
Total	100.0	100.0	100.0	100.0	100.0

Chart 2.4 reveals that in the United Republic of Tanzania, the majority of visitors in the age groups of less than 18 to 45-64 years came under the non-package tour arrangement. Most senior citizen came under the package tour arrangement, partly because elders need

specialized services. In the case of Zanzibar, the package tour arrangement was mostly preferred by visitors aged 45 years and above.

Chart 2.4: Age Group by Tour Arrangement

Percent



Most visitors came for leisure and holidays followed by those who came to visit friends and relatives and business purpose. Senior citizens, about 77 percent, came for leisure and holidays (**Table 2.3**). In the case of Zanzibar, a similar pattern was observed, except for visitors who came for medical treatment.

Table 2.3: Age Group by Purpose of Visit, URT

Percent

	Age group				
Purpose of visit	Below 18	18-24	25-44	45-64	65 and above
Business	4.3	5.1	16.3	16.8	3.0
Leisure and holidays	59.3	58.0	60.4	52.3	77.0
Medical treatment	0.5	0.4	0.4	0.7	0.2
Meetings and conference	2.4	0.8	2.7	5.1	2.1
Religion	0.0	0.4	0.3	0.6	0.6
Scientific and academic	1.4	1.0	0.7	0.7	0.2
Visiting friends and relatives	23.0	22.1	14.2	19.2	13.3
Volunteering	3.3	6.5	0.4	1.0	1.5
Other	5.8	5.7	4.6	3.6	2.1
Total	100.0	100.0	100.0	100.0	100.0

Table 2.4: Age Group by Purpose of Visit in Zanzibar

Percent

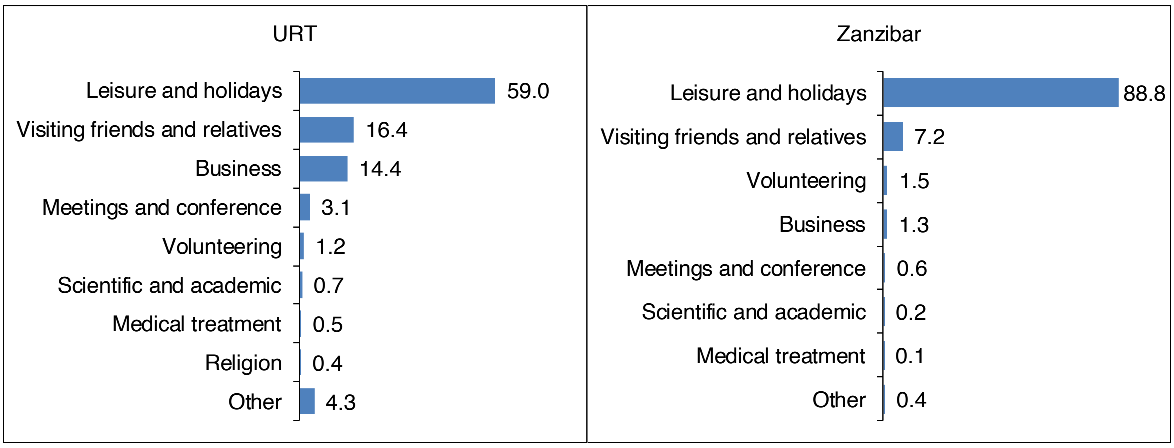
Purpose of visit	Age group				
	Below 18	18-24	25-44	45-64	65 and above
Business	3.0	0.9	0.9	2.8	2.0
Leisure and holidays	91.0	78.6	91.3	85.8	92.1
Medical treatment	0.0	0.2	0.0	0.0	0.0
Meetings and conference	0.0	0.2	0.6	0.8	1.0
Scientific and academic	0.0	0.6	0.2	0.0	0.0
Visiting friends and relatives	5.0	13.0	6.3	7.4	3.9
Volunteering	1.0	6.0	0.4	2.5	1.0
Other	0.0	0.5	0.3	0.7	0.0
Total	100.0	100.0	100.0	100.0	100.0

2.4 Purpose of Visit

Visitors who came for leisure and holidays accounted for 59 percent, followed by those who came to visit friends and relatives as well as business (**Chart 2.5**). There is an increase of 15 percent for the visitors who came for leisure and holidays when compared to 2020. In Zanzibar, a similar pattern has been observed except for visitors who came for volunteering.

Chart 2.5: Purpose of Visit

Percent



Visitors from long haul source market such as France, the United States of America and South Africa mostly came to the United Republic of Tanzania for leisure and holidays, while visitors from Kenya and Burundi came mainly to visit friends and relatives. Business visitors were largely from Zambia, Democratic Republic of Congo and Zimbabwe (**Table 2.5**).

Table 2.5: Purpose of Visit of Top 15 Source Markets, URT

Percent

Country of residence	Leisure and holidays	Visiting friends and relatives	Business	Meetings and conference	Volunteering	Scientific and academic	Medical treatment	Religion	Other
	Purpose of visit								
France	23.3	8.3	0.4	0.7	7.5	4.8	0.0	0.0	0.5
United States	17.6	4.2	0.8	2.6	15.0	0.0	0.0	27.3	1.0
Kenya	1.7	32.0	7.2	46.5	4.7	33.9	48.8	33.3	17.5
Zambia	0.1	2.6	35.6	0.4	0.0	4.8	0.0	3.0	6.0
Congo, DRC	0.6	7.4	23.8	2.6	0.0	0.0	4.9	6.1	8.1
South Africa	7.1	1.5	3.2	2.2	0.0	0.0	0.0	6.1	2.3
Burundi	0.2	16.8	2.8	4.8	5.6	3.2	26.8	3.0	23.0
Germany	6.5	2.1	0.1	1.1	16.8	3.2	0.0	0.0	0.3
Spain	5.5	2.8	0.2	0.0	0.9	0.0	0.0	0.0	0.0
Belgium	5.3	1.2	0.2	0.0	24.3	3.2	0.0	0.0	0.5
Zimbabwe	0.3	1.6	15.2	2.2	0.0	1.6	0.0	0.0	4.4
Uganda	0.5	5.0	2.2	9.9	0.0	9.7	2.4	6.1	23.0
Switzerland	3.1	0.3	0.0	0.4	0.0	0.0	0.0	0.0	0.0
Netherlands	2.5	1.5	0.3	0.4	1.9	3.2	0.0	0.0	0.8
Israel	2.8	0.3	0.0	0.0	2.8	0.0	0.0	0.0	0.0
Other	22.8	12.5	8.1	26.4	20.6	32.3	17.1	15.2	12.5
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

In Zanzibar, the majority of visitors came for leisure and holidays and mainly came from France, South Africa, and the United States of America. Those who came to visit friends and relatives were mainly from France, Spain, and Germany. The majority of business visitors were from South Africa and the United States of America (**Table 2.6**).

Table 2.6: Purpose of Visit of Top 15 Source Markets, Zanzibar

Percent

Country of residence	Leisure and holidays	Visiting friends and relatives	Business	Meetings and conference	Volunteering	Scientific and academic	Medical treatment	Religion	Other
	Purpose of visit								
France	30.2	38.5	1.9	8.7	10.2	42.9	0.0	0.0	0.0
South Africa	9.3	1.4	36.5	0.0	0.0	0.0	0.0	0.0	18.8
United States	8.2	5.2	3.8	4.3	18.6	0.0	0.0	0.0	0.0
Spain	6.1	13.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Germany	6.1	5.6	0.0	8.7	27.1	0.0	0.0	0.0	0.0
Belgium	5.5	3.1	0.0	0.0	15.3	14.3	0.0	0.0	12.5
Israel	3.1	1.7	0.0	0.0	3.4	0.0	0.0	0.0	0.0
Switzerland	3.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Netherlands	2.5	3.8	0.0	0.0	3.4	28.6	0.0	0.0	12.5
United Arab Emirates	2.1	1.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Egypt	1.8	1.4	5.8	0.0	5.1	0.0	0.0	0.0	0.0
Poland	1.8	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Italy	1.3	3.5	0.0	0.0	1.7	0.0	0.0	0.0	0.0
Portugal	1.4	0.0	1.9	0.0	0.0	0.0	0.0	0.0	0.0
Serbia	1.3	0.0	0.0	0.0	5.1	0.0	0.0	0.0	0.0
Other	15.9	19.8	50.0	78.3	10.2	14.3	100.0	0.0	56.3
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	0.0	100.0

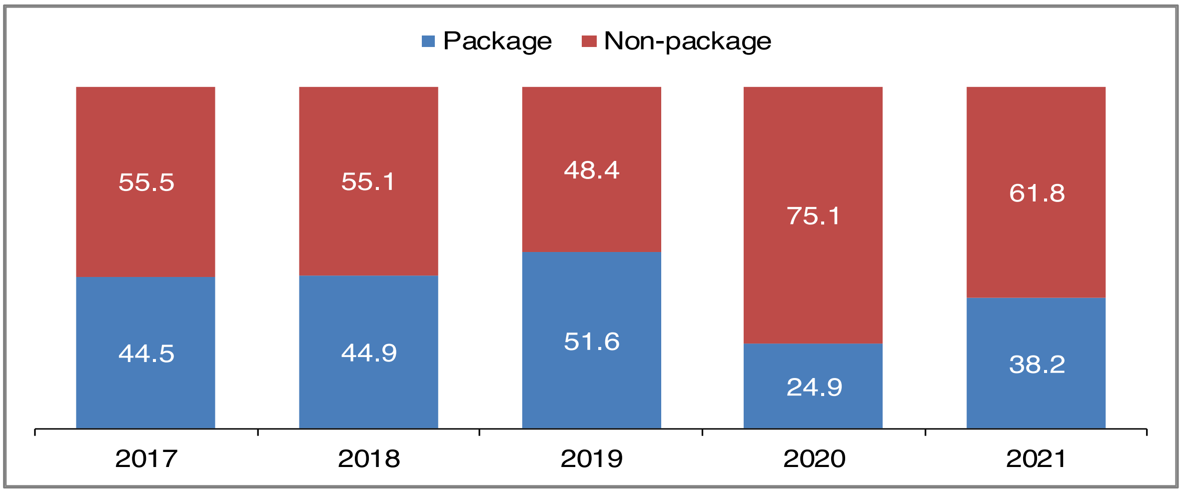
2.5 Tour Arrangement

The survey's results revealed that visitors who came under the non-package tour arrangement dominated by 61.8 percent (**Chart 2.6**). However, there was an increase of visitors who came under the package tour arrangement by 7.3 percent compared to 2020.

This is partly attributed by easing travel restrictions in long haul destinations. Most of the visitors from long haul destinations prefer to use package tour arrangement (**Chart 2.7**).

Chart 2.6: Visitors by Tour Arrangement, URT

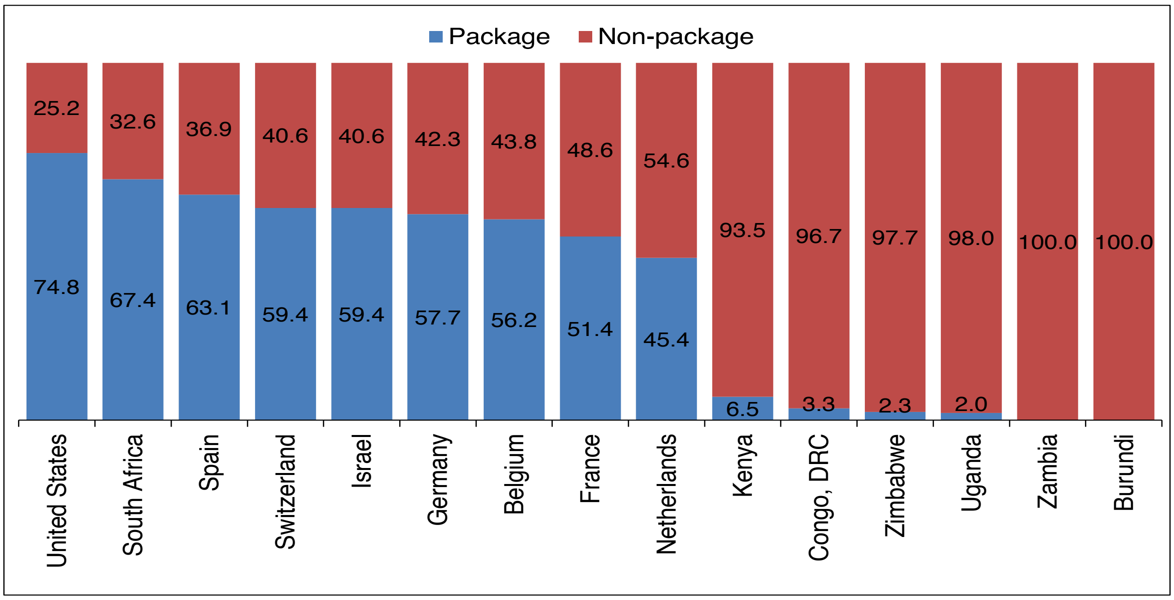
Percent



Visitors from the United States of America, South Africa and Spain mainly came under the package tour arrangement. Visitors from the neighboring countries such as Burundi, Zambia, and Uganda ranked higher in the non-package tour arrangement (**Chart 2.7**).

Chart 2.7: Top 15 Source Markets by Tour Arrangement, URT

Percent



In Zanzibar, 51.2 percent of visitors came under the package tour arrangement and the leading source markets were South Africa, Portugal and Serbia. With respect to the non-package tour arrangement, the leading source markets were United Arab Emirates, Italy and Netherlands (**Chart 2.8**). With the exception of 2020, most of visitors to Zanzibar, came under the package tour arrangement (**Chart 2.9**).

Chart 2.8: Top 15 Source Markets by Travel Arrangement, Zanzibar

Percent

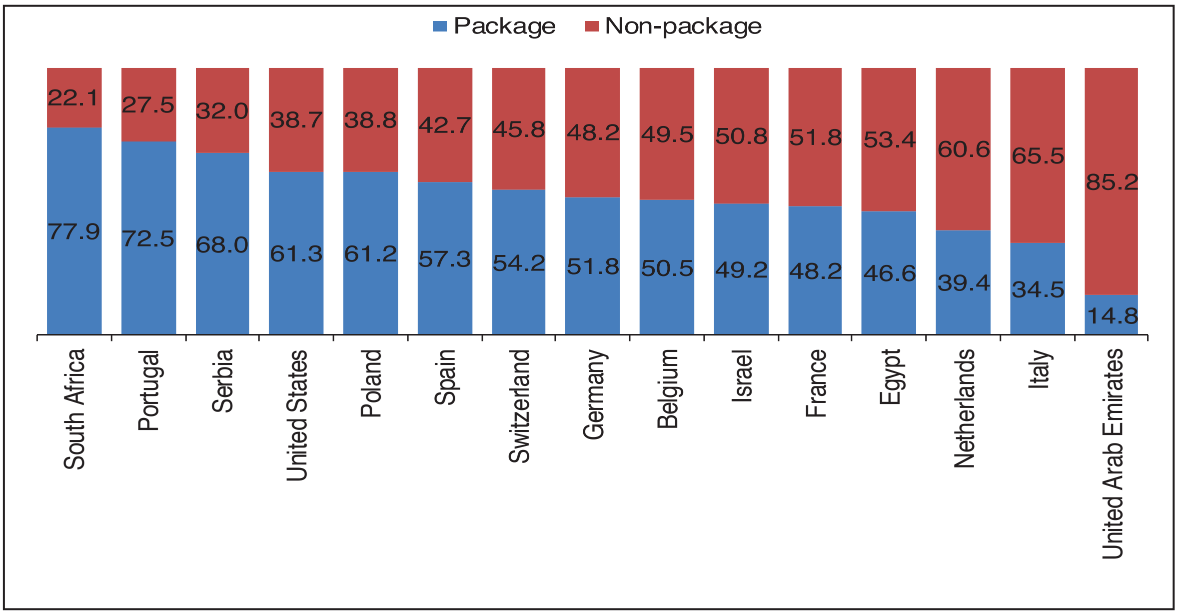
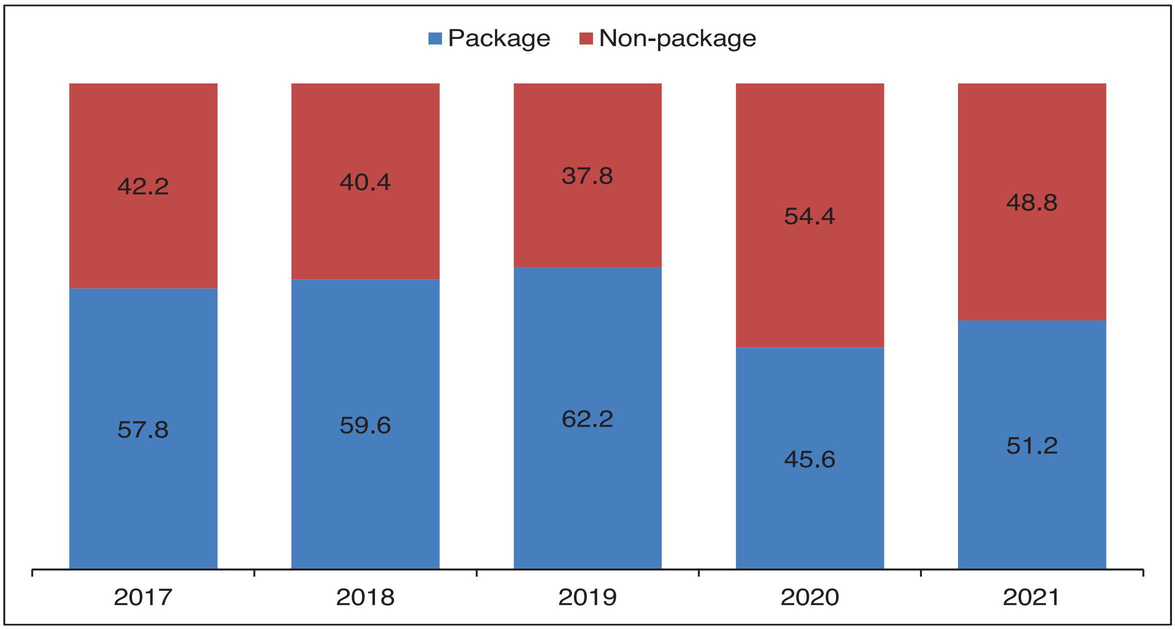


Chart 2.9: Visitors by Tour Arrangement, Zanzibar

Percent



In the United Republic of Tanzania, visitors who came under the non-package tour dominated in all purposes except those who came for leisure and holidays (**Chart 2.10**). The same pattern is observed for Zanzibar as indicated (**Chart 2.11**).

Chart 2.10: Travel Arrangement by Purpose Of Visit, URT

Percent

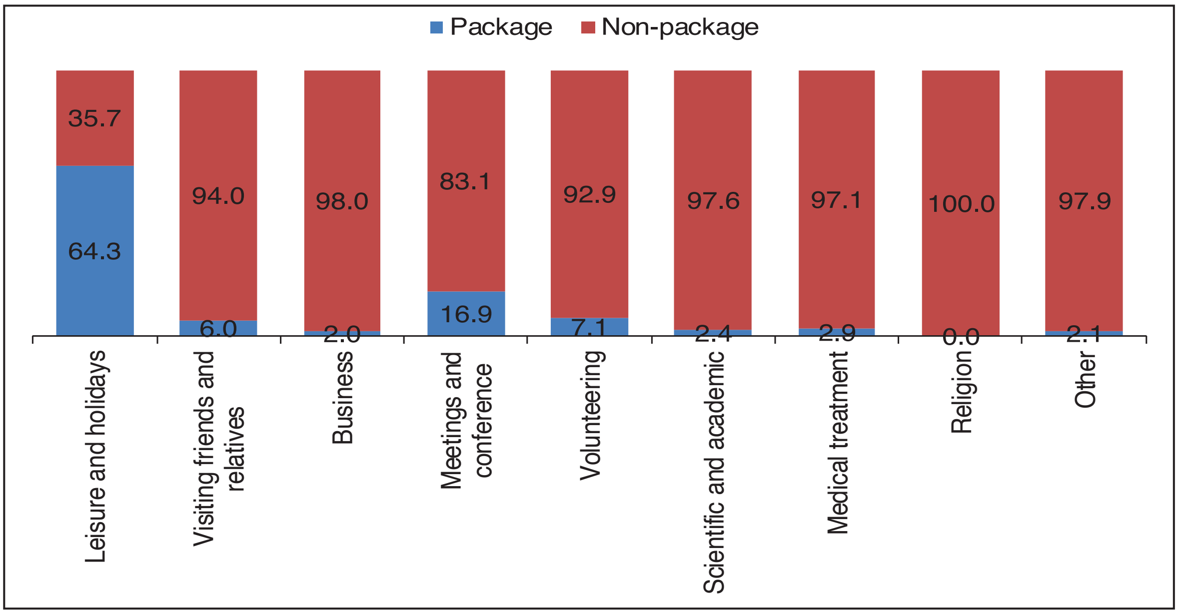
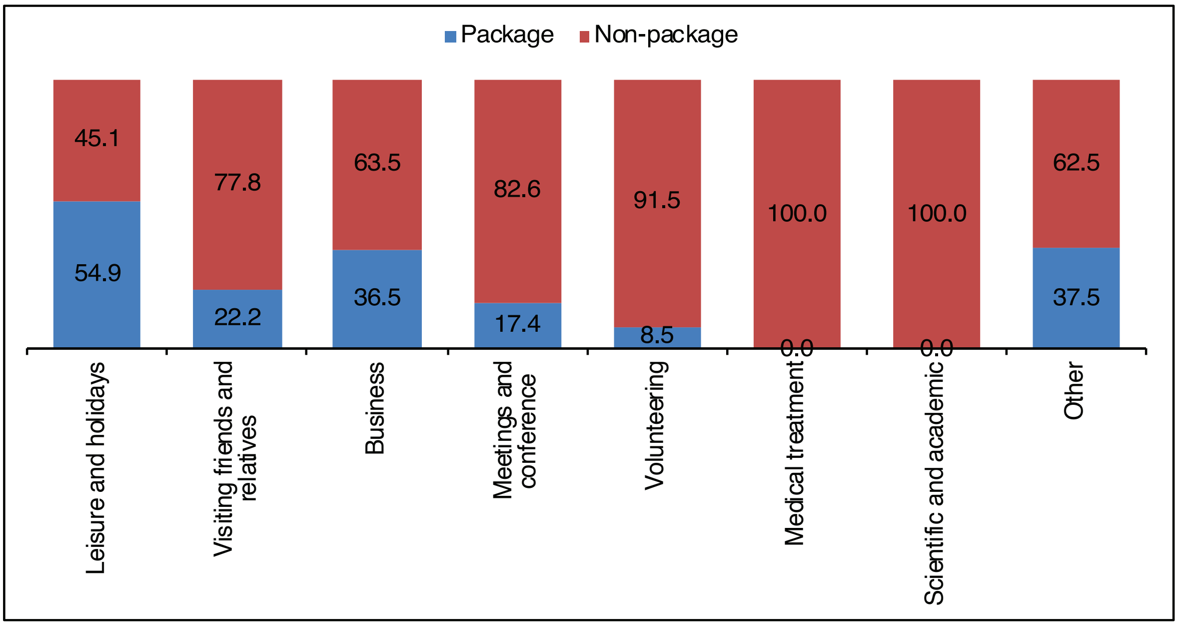


Chart 2.11: Travel Arrangement by Purpose of Visit, Zanzibar

Percent

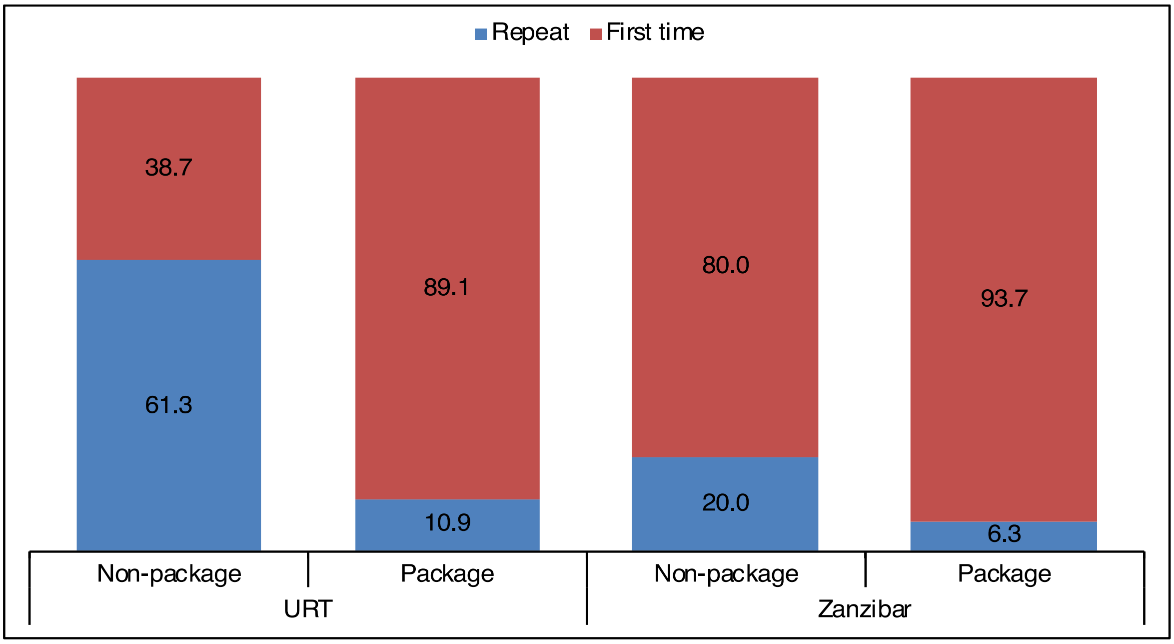


2.6 First-time and Repeat Visits

The results depict that 53.5 percent of the interviewed visitors were first-timers and the rest were repeat visitors for URT. First-time visitors mainly used the package tour arrangement, while repeat visitors were mostly under the non-package tour arrangement. In Zanzibar, the majority of both package and non-package visitors were first-timers (**Chart 2.12**).

Chart 2.12: First-time and Repeat Visitors

Percent



The majority of first-time visitors to the United Republic of Tanzania were from France, Spain, Israel, Belgium, the United States of America and Switzerland. Meanwhile, visitors from the neighboring countries such as Zimbabwe, DRC, Burundi, Kenya, Zambia and Uganda, took the lead in bringing repeat visitors explained by good business relations and family ties with Tanzania (**Chart 2.13**). The majority of first-time visitors mainly came for leisure and holidays while repeat visitors came for business (**Table 2.7**).

Chart 2.13: First-time and Repeat Visitors by Top 15 Source Markets, URT

Percent

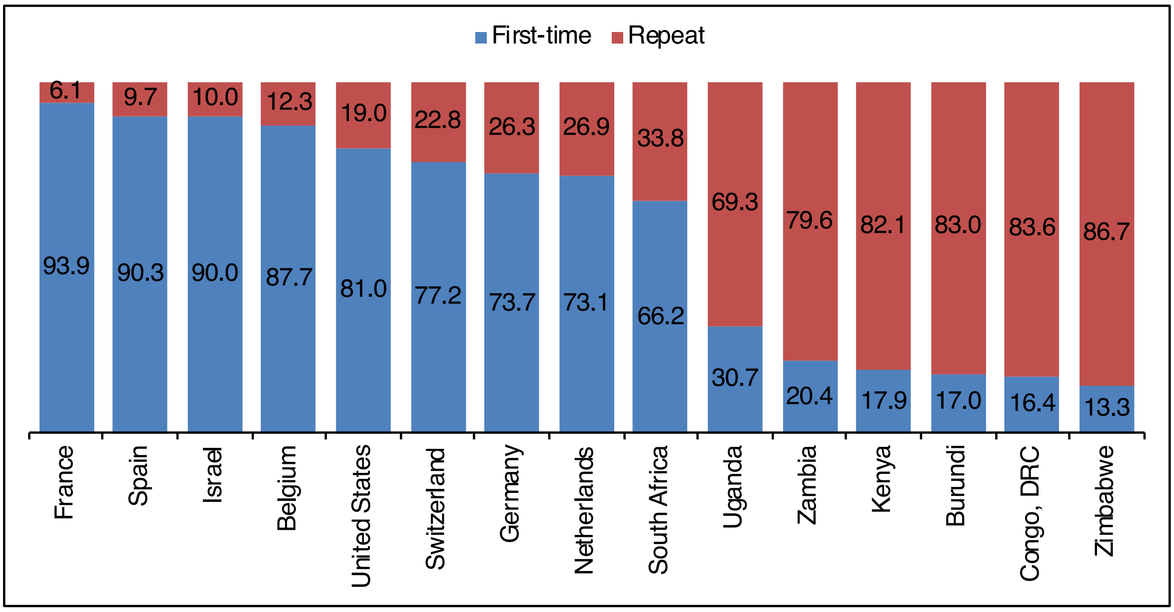


Table 2.7: First-time Visitors and Repeat Visitors by Purpose of Visit, URT

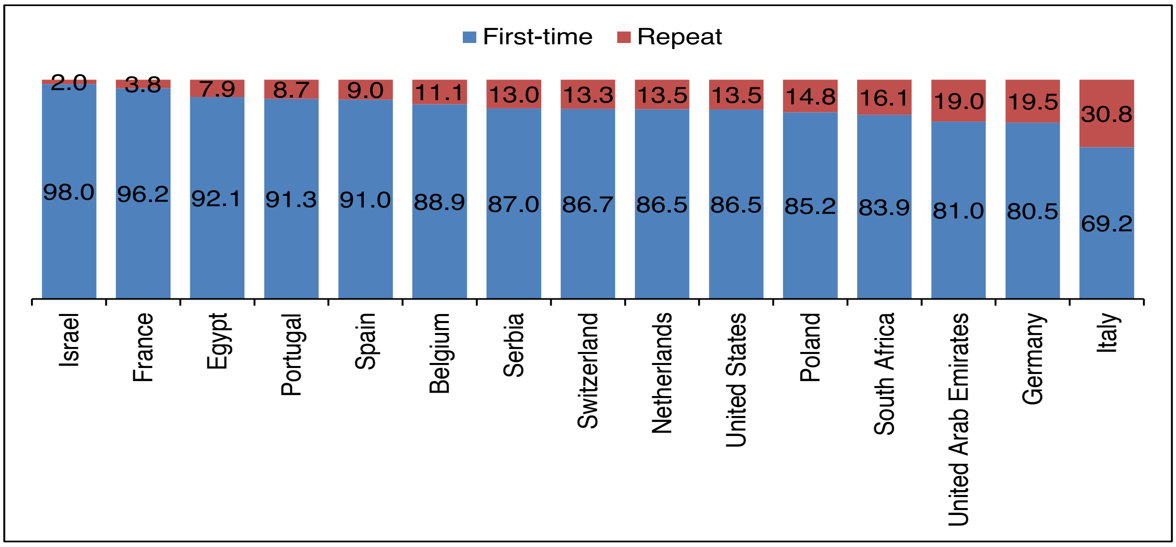
Percent

Purpose of visit	Repeat visitors	First-time visitors
Business	34.2	7.7
Leisure and holidays	16.0	76.3
Medical treatment	1.0	0.1
Meetings and conference	5.6	1.8
Religion	0.8	0.2
Scientific and academic	1.1	0.7
Visiting friends and relatives	32.2	8.8
Volunteering	0.6	1.6
Other	8.5	2.8
Total	100	100

A high proportion of first-time visitors to Zanzibar came from Israel, France, Egypt, Portugal and Spain (**Chart 2.14**).

Chart 2.14: First-time and Repeat Visitors by Top 15 Source Markets, Zanzibar

Percent



The results show that the majority of visitors who came for leisure and holidays were first-timers accounting for 91.8 percent, followed by visiting friends and relatives, and business. Most of repeat visitors came as holidaymakers, but also to visit friends and relatives, and for business purposes (**Table 2.8**).

Table 2.8: First-time Visitors and Repeat Visitors by Purpose of Visit, Zanzibar

Percent

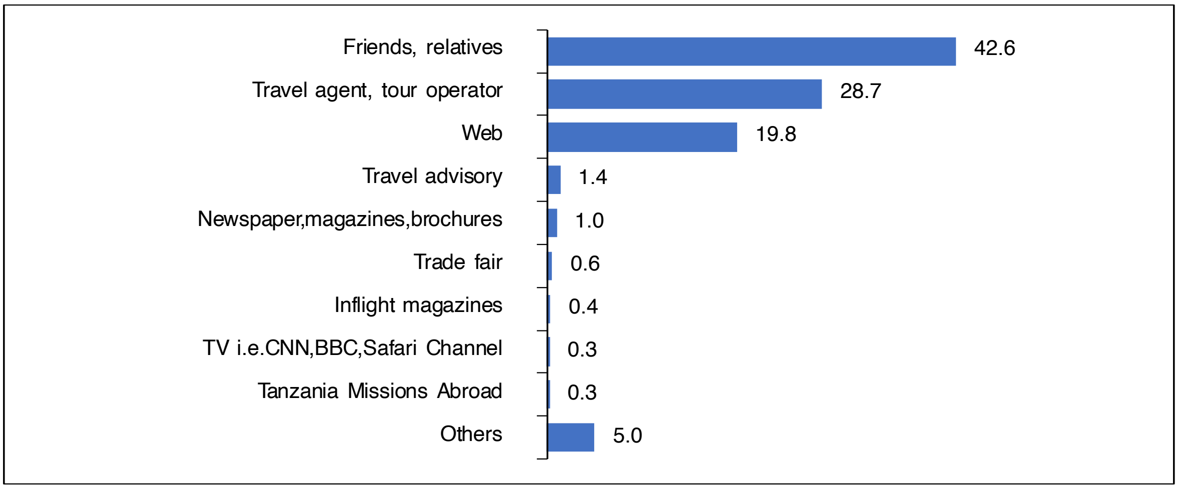
Purpose of visit	Repeat visitors	First-time visitors
Business	5.4	0.9
Leisure and holidays	61.4	91.8
Medical treatment	0.0	0.1
Meetings and conference	5.4	0.2
Volunteering	3.5	1.3
Scientific and academic	0.4	0.2
Visiting friends and relatives	23.2	5.1
Other	0.7	0.4
Total	100.0	100.0

2.7 Source of Information

The survey's findings depict that about 42.6 percent of the visitors coming to Tanzania received information from friends and relatives, followed by tour operators and travel agents. Few visitors received information about Tanzania's attractions through TV networks, such as safari channels and Tanzania missions abroad (**Chart 2.15**). More efforts are needed to promote tourism attractions through digital marketing, tourism exhibitions and trade fairs.

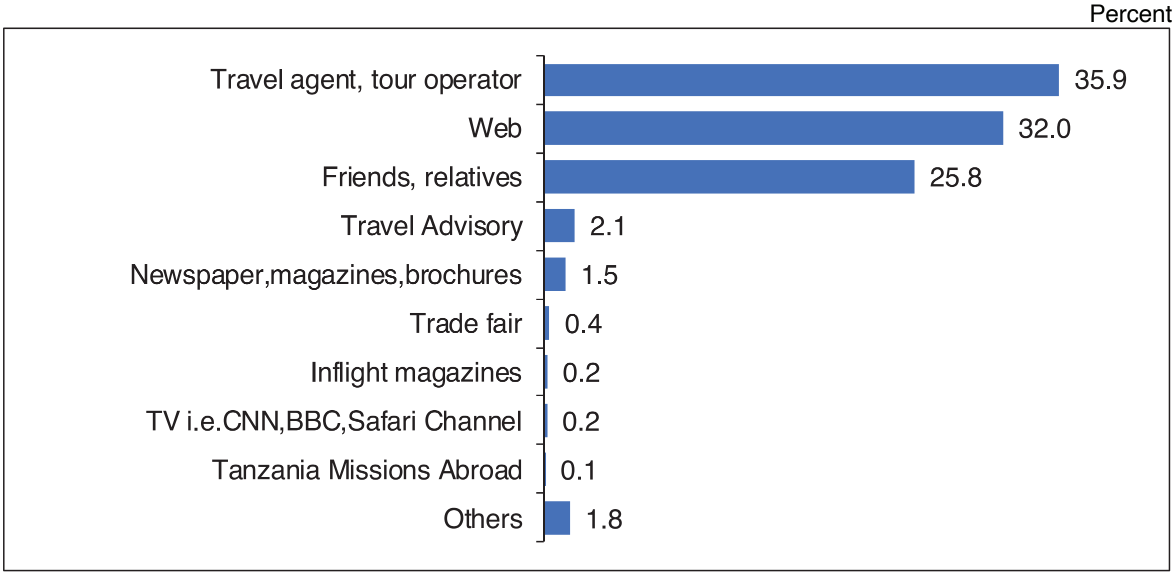
Chart 2.15: Source of Information About Destination Tanzania

Percent



In Zanzibar, about 36 percent of visitors heard about Tanzania from tour operators and travel agents, followed by internet sources. Few visitors receive information about Tanzania attractions through TV networks, such as safari channels and Tanzania missions abroad (**Chart 2.16**).

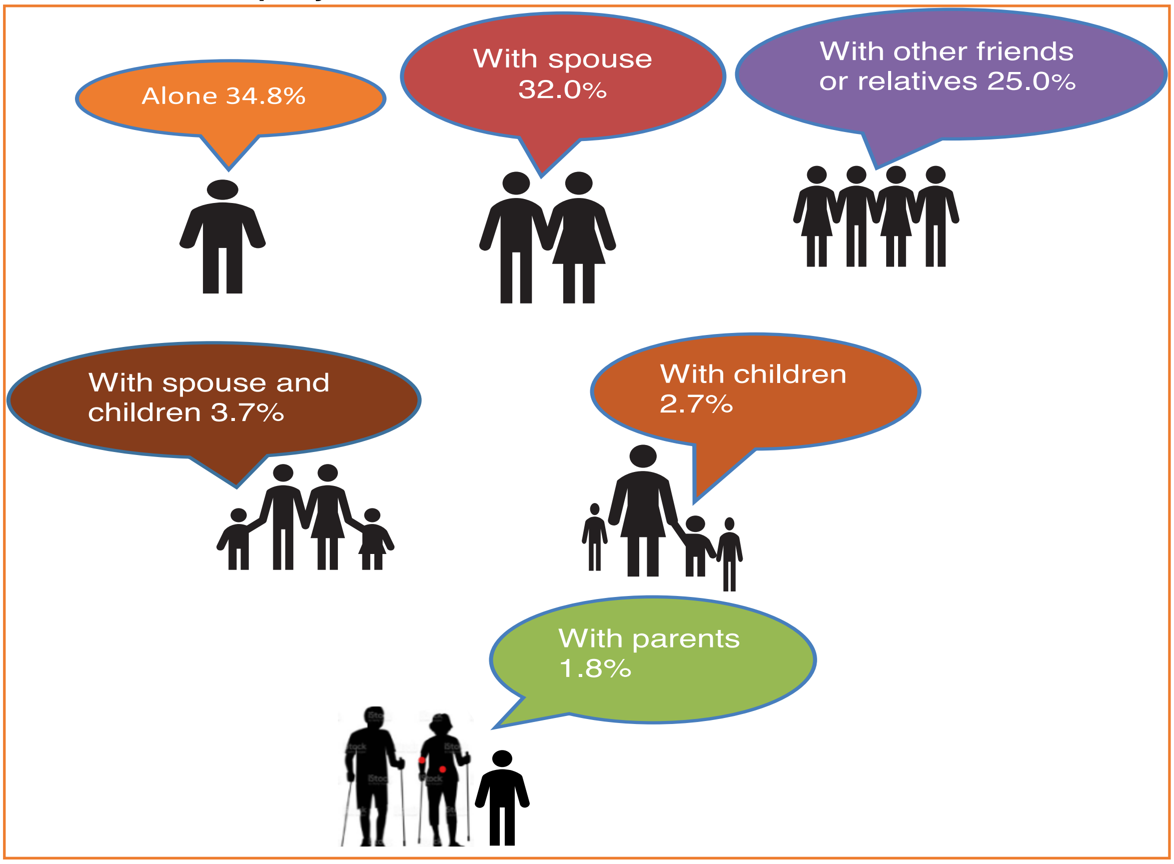
Chart 2.16: Source of Information, Zanzibar



2.8 Travel Party

The survey's findings show that 34.8 percent of the respondents travelled alone (**Chart 2.17**). Those who travelled with spouses accounted for 32 percent, followed by those who travelled with other friends and relatives. A small proportion of visitors came with parents.

Chart 2.17: Travel party, URT



The majority of visitors under all travel parties were in the age group of “25-44”, followed by those in the age group of “45-64” (**Table 2.9**). A similar pattern was observed in Zanzibar (**Table 2.10**).

Table 2.9: Travel Party by Age Group, URT

Percent

Travel party	Age group <18	18-24	25-44	45-64	65+	Total
Alone	0.4	6.5	57.4	31.6	4.2	100.0
With children	0.0	2.5	50.8	40.9	5.8	100.0
With other friends/relatives	0.0	11.5	57.6	26.1	4.7	100.0
With parents	5.7	34.2	48.1	12.0	0.0	100.0
With spouse	0.1	6.8	66.9	19.5	6.6	100.0
With spouse and children	0.0	3.3	50.0	40.3	6.4	100.0

More than half of the visitors to Zanzibar came with their spouse followed by those who came with other friends and relatives. Nonetheless, those who came with parents and with children were the least (**Chart 2.18**).

Chart 2.18: Travel party, Zanzibar

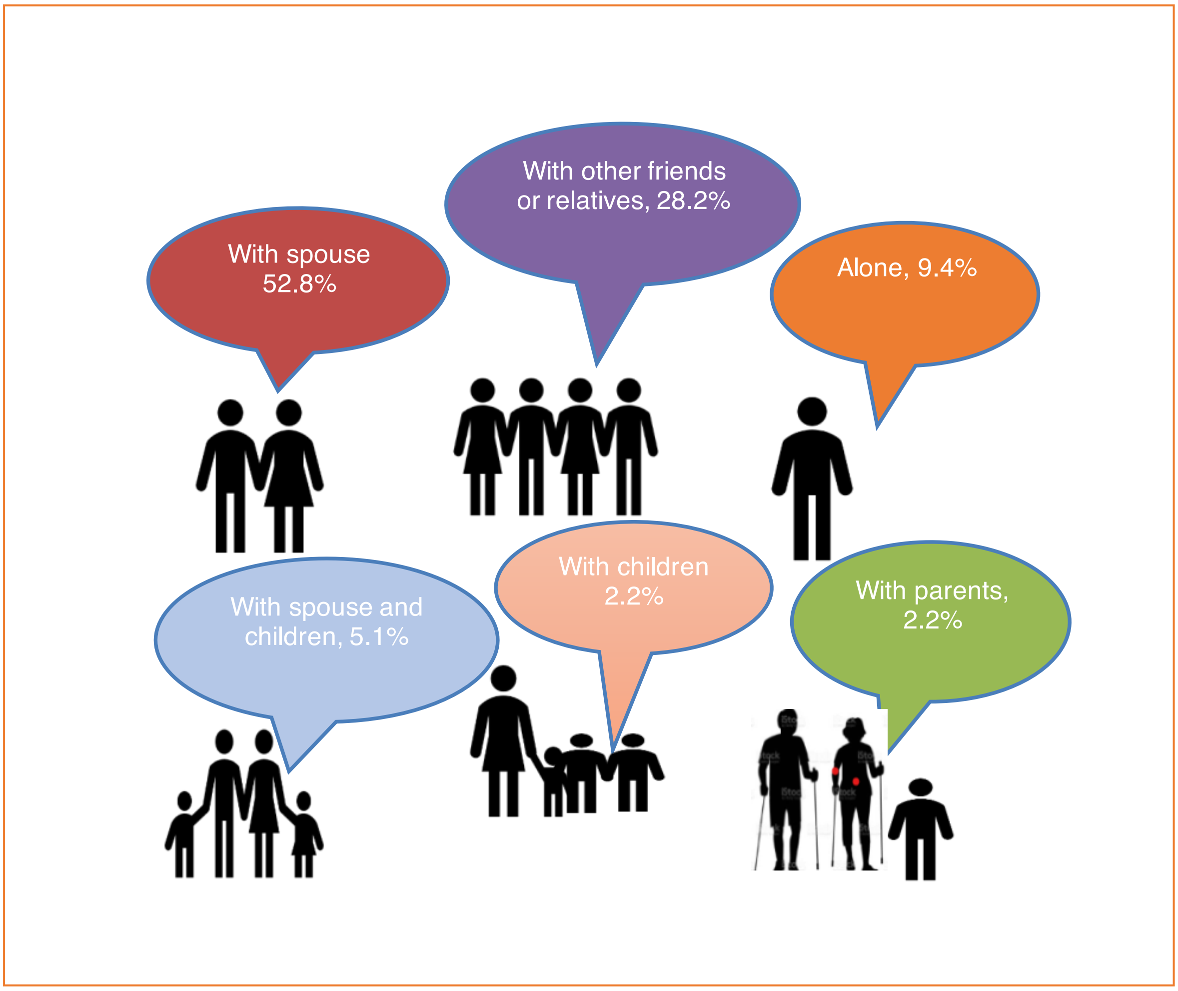


Table 2.10: Travel Party by Age Group, Zanzibar

Percent

Travel party	Age group <18	18-24	25-44	45-64	65+	Total
Alone	0.5	13.8	59.3	25.0	1.3	100.0
With children	0.0	4.4	52.2	36.7	6.7	100.0
With other friends/relatives	0.1	14.4	58.9	24.2	2.4	100.0
With parents	4.4	33.3	43.3	18.9	0.0	100.0
With spouse	0.2	8.4	75.1	14.6	1.7	100.0
With spouse and children	0.0	2.4	49.3	44.9	3.4	100.0

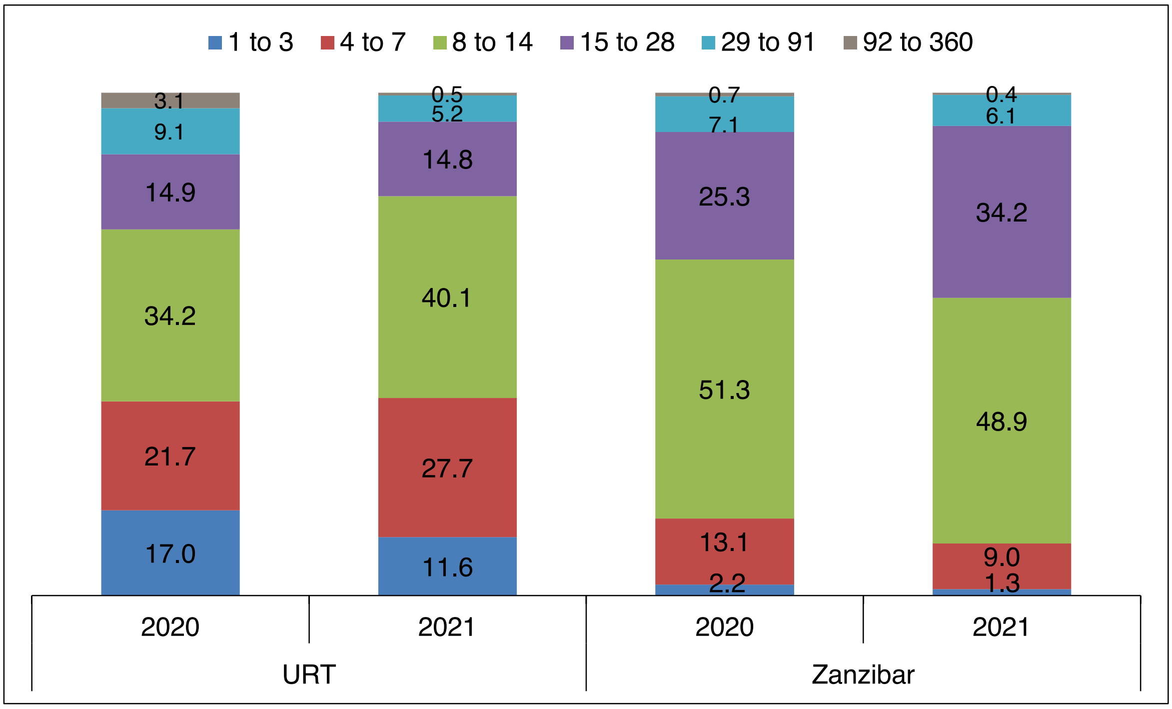
2.9 Nights Spent and Length of Stay

2.9.1 Nights Spent

Nights spent by visitors varied depending on purpose of visit and country of origin. The survey's results show that about 40 percent of the visitors spent 8 to 14 nights, 27.7 percent spent 4 to 7 nights, while about 12 percent of total visitors spent 1 to 3 nights. The results are broadly the same as in the previous surveys. Generally, the majority of visitors spent between 1 to 14 nights, while a few of them spent between 15 to 360 nights (**Chart 2.19**). In Zanzibar, about 50 percent of the visitors spent 8 to 14 nights, while those who spent more than a month account for about 6 percent**.**

Chart 2.19: Proportion of Visitors by Night Spent

Percent



About 55 percent of the holidaymakers spent between 8 to 14 nights, while visitors who came for business as well as meetings and conference spent 4 to 7 nights. Meanwhile, a large proportion of visitors, who came for medical treatment spent 29 to 91 nights (**Table 2.11**).

Table 2.11: Distribution of Visitors by Nights Spent and Purpose of Visit, URT

Percent

	Purpose of visit								
Night spent	Business	Leisure and holidays	Visiting friends and relatives	Medical treatment	Meetings and conference	Religion	Scientific and academic	Volunteering	Other
1 to 3	19.9	2.4	24.3	24.4	19.4	0.0	12.9	0.9	58.7
4 to 7	47.4	23.1	26.6	2.4	47.6	33.3	29.0	5.6	23.0
8 to 14	18.3	54.6	23.3	19.5	21.6	18.2	16.1	18.7	6.3
15 to 28	7.2	17.4	1.3	24.4	7.3	27.3	17.7	36.4	7.6
29 to 91	6.8	2.4	11.2	29.3	4.0	18.2	12.9	32.7	3.4
92 to 360	0.3	0.2	1.2	0.0	0.0	3.0	11.3	5.6	1.0

In Zanzibar, the majority of holidaymakers spent 8 to 14 nights, while business visitors spent 29 to 91 nights. Business visitors stay longer, partly due to the search of investment opportunities and market reconnaissance. Meanwhile, visitors who are coming for meeting and conference spent about 4 to 14 nights (**Table 2.12**).

Table 2.12: Distribution of Visitors by the Nights Spent and Purpose of Visit, Zanzibar

Percent

	Purpose of visit							
Nights	Business	Leisure and holidays	Medical treatment	Meetings and conference	Scientific and academic	Visiting friends and relatives	Volunteering	Other
1 to 3	17.6	0.6	0.0	17.4	0.0	2.4	15.3	0.0
4 to 7	25.5	8.5	0.0	34.8	28.6	10.1	5.1	18.8
8 to 14	5.9	50.2	0.0	34.8	42.9	39.9	64.4	31.3
15 to 28	3.9	34.8	0.0	13.0	28.6	40.3	11.9	12.5
29 to 91	41.2	5.5	100.0	0.0	0.0	6.9	1.7	31.3
92 to 360	5.9	0.3	0.0	0.0	0.0	0.3	1.7	6.3

2.9.2 Average Length of Stay

The survey's findings depict that the overall average length of stay per person per nights was 10 nights. Visitors from Germany stayed the longest with an average of 18 nights (**Table 2.13**). These results are similar to the previous findings, whereby visitors from long haul source markets stayed the longest. Visitors from Kenya, Zambia and Zimbabwe stayed the least with an average of less than 9 nights each.

Table 2.13: Length of Stay by Purpose of Visit and Top 15 Source Markets, URT

Country of residence	Purpose of visit: Business	Leisure and holidays	Medical treatment	Visiting friends and relatives	Other	Average
France	19	10	n.a	11	14	12
United States	12	12	n.a	12	24	14
Kenya	6	7	12	6	11	8
Zambia	6	7	n.a	15	4	8
Congo, DRC	10	18	10	16	8	14
South Africa	14	14	n.a	6	22	14
Burundi	9	9	22	15	6	11
Germany	11	16	n.a	17	31	18
Spain	9	10	n.a	16	15	11
Belgium	26	13	n.a	14	18	15
Zimbabwe	6	6	n.a	4	3	5
Uganda	9	11	1	11	30	13
Switzerland	7	15	n.a	16	n.a	14
Netherlands	18	15	n.a	14	21	16
Israel	n.a	14	n.a	17	6	13
Overall	10	12	11	13	16	10

Note: n.a denotes not available

In Zanzibar, the overall average length of stay was 8 nights, an increase of 1 night from 2020. Overall average length of stay of business visitors was 11 nights. Holidaymakers and those visiting friends and relatives spent an average of 8 nights each. Visitors from France and Netherlands stayed the longest with an average of 11 nights. France and South Africa were dominant in business purposes, while Germany and Netherlands took the lead in leisure and holidays (**Table 2.14**).

Table 2.14: Length of Stay by Purpose of Visit and Top 15 Source Markets, Zanzibar

Country of residence	Purpose of visit: Business	Leisure and holidays	Visiting friends and relatives	Other	Average
France	34	7	9	17	11
South Africa	18	7	6	17	10
United States	2	5	5	2	4
Spain	n.a	6	8	n.a	7
Germany	2	10	8	12	9
Belgium	n.a	8	8	3	7
Switzerland	n.a	8	13	n.a	8
Israel	n.a	8	6	6	7
Netherlands	n.a	10	13	11	11
United Arab Emirates	n.a	6	7	n.a	6
Egypt	2	8	8	6	7
Poland	n.a	9	14	n.a	10
Italy	n.a	7	11	7	8
Portugal	2	7	n.a	n.a	6
Serbia	n.a	11	n.a	7	10
Overall	11	8	8	10	8

Note: n.a denotes not available

2.10 Mode of Payment

The survey's results indicate that about 90.4 percent of the interviewed visitors settled their bills in cash, followed by those who used credit cards. Meanwhile, the number of visitors who used other modes of payment such as travelers' cheques, bank transfers and bankers' cheques remained the least as observed in the previous surveys' results. The usage of cash was also prominent in Zanzibar (**Table 2.15**).

Table 2.15: Mode of Payment

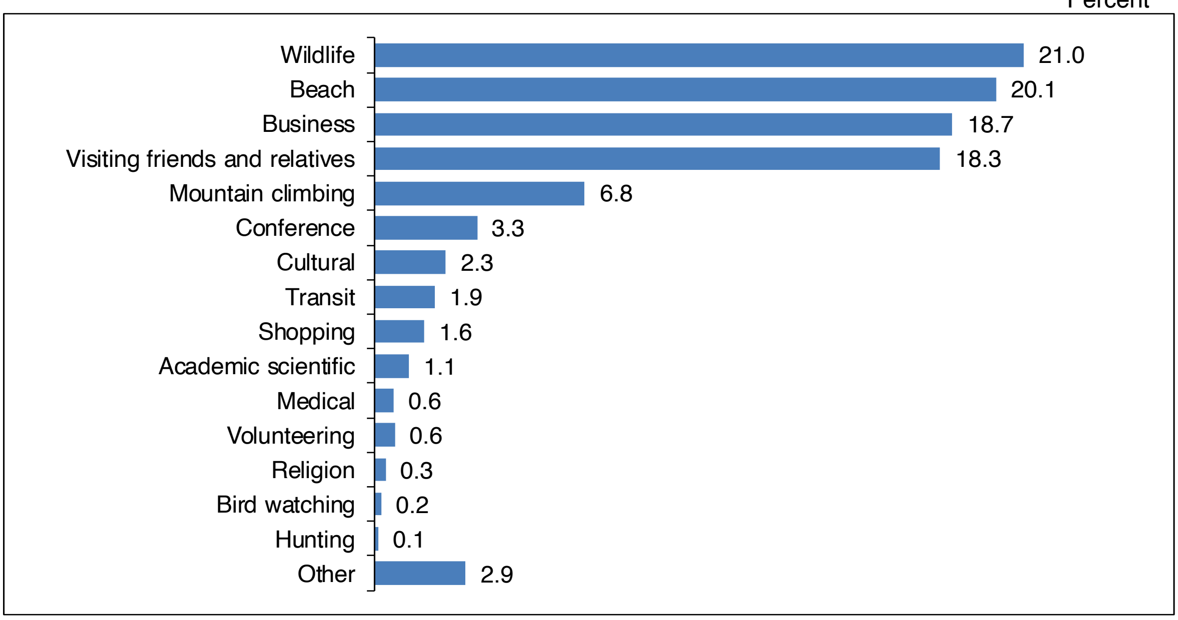
Percent

	URT			Zanzibar		
Year	Cash	Credit card	Other	Cash	Credit card	Other
2016	83.9	15.8	0.3	77.6	21.0	1.4
2017	72.5	19.3	8.2	64.5	28.9	6.6
2018	82.9	16.9	0.2	76.0	23.9	0.1
2019	87.5	12.2	0.3	84.1	15.7	0.2
2020	83.2	15.6	1.2	70.3	28.7	1.0
2021	90.4	8.8	0.7	84.3	15.2	0.5

2.11 Main Tourism Activity

Wildlife, beach, business and visiting friends and relatives continued to be the main tourism activities accounting for 78.1 percent. However, these activities were more diversified unlike the previous years in which wildlife was prominent. The increase in share of business activity is associated with a large number of visitors from the neighboring countries, with the purpose of purchasing essential goods since Tanzania did not impose travel restrictions as part of measures to combat the COVID-19 pandemic (**Chart 2.20**).

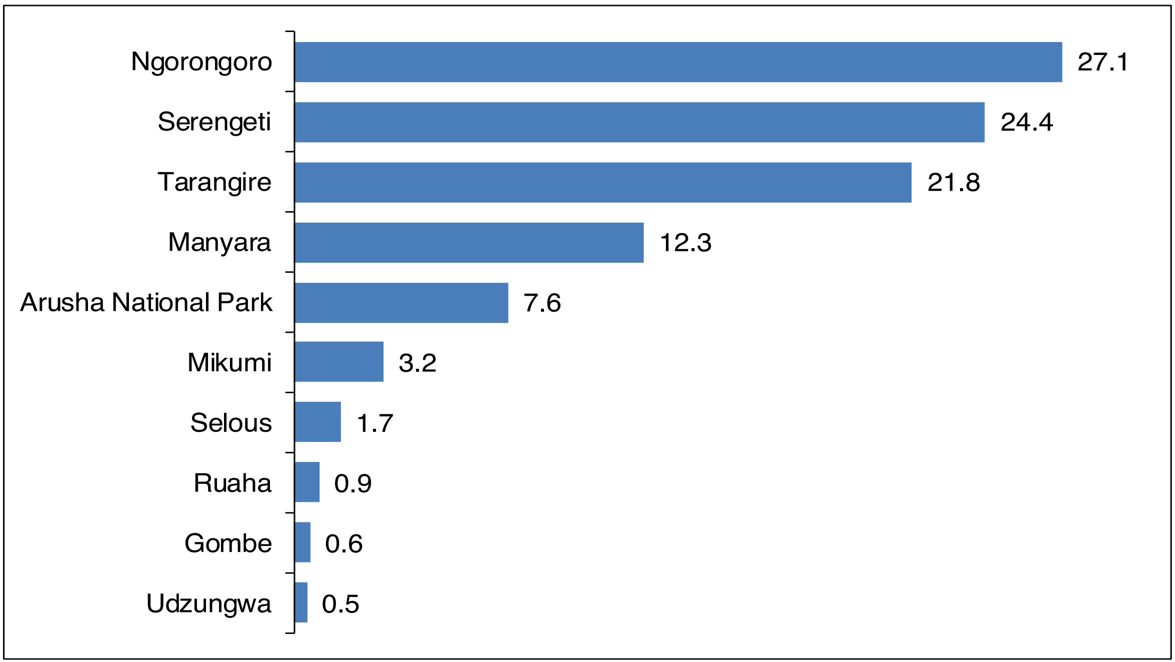
Chart 2.20: Main Tourism Activities in URT



The leading wildlife attractions were Ngorongoro, Serengeti and Tarangire (**Chart 2.21**). Their significant share is due to improved infrastructure, peculiar attractions, and easy connectivity.

Chart 2.21: Most Visited Wildlife Attractions

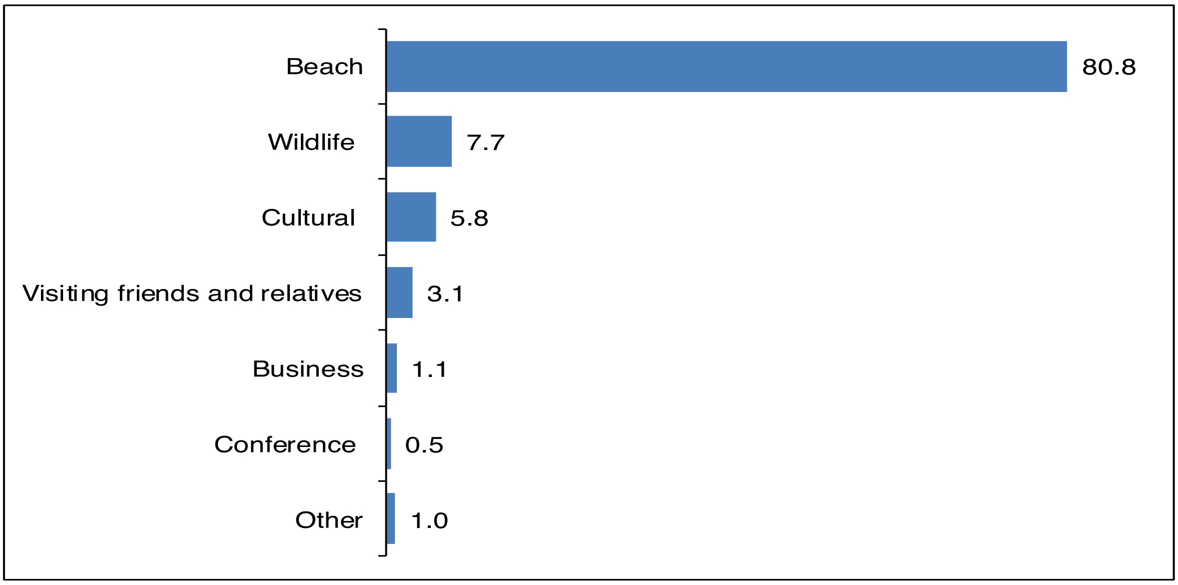
Percent



In Zanzibar, the beach continued to be the main tourism activity attracting 80.8 percent, followed by wildlife and cultural tourism (**Chart 2.22**).

Chart 2.22: Main tourism activity in Zanzibar

Percent

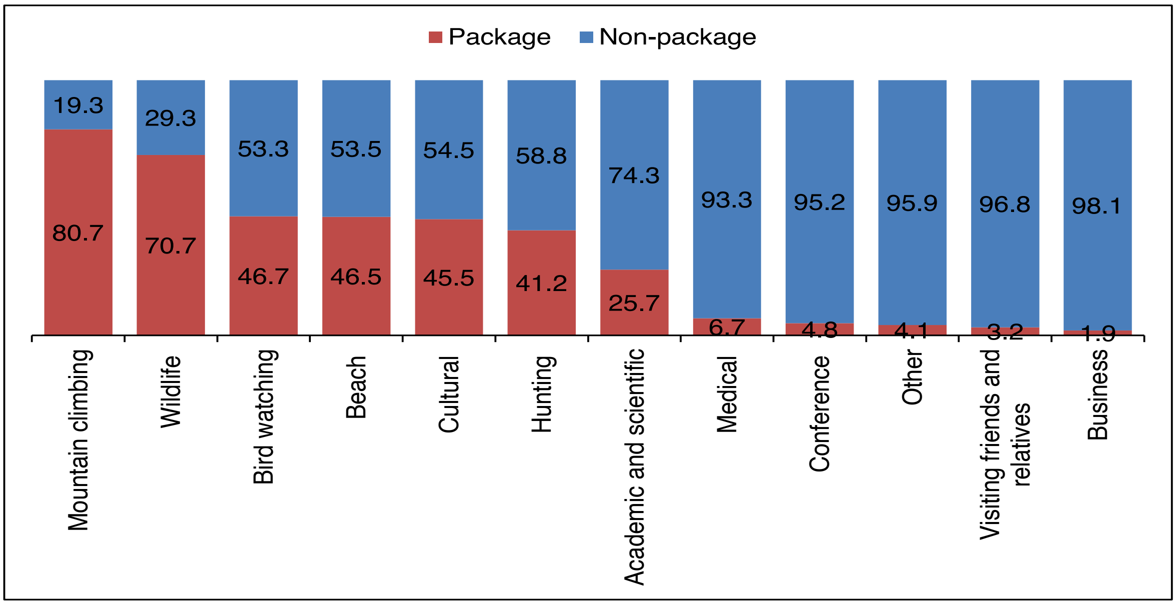


2.12 Tourism Activity by Travel Arrangement

The findings show that most visitors who came for mountain climbing and wildlife were under the package tour arrangement. The non-package tour arrangement was dominated by visitors who came for business, visiting friends and relatives, medical tourism, meetings, and conference, consistent with the large number of visitors from the neighboring countries (**Chart 2.23**).

Chart 2.23: Tourism activity by travel arrangement

Percent

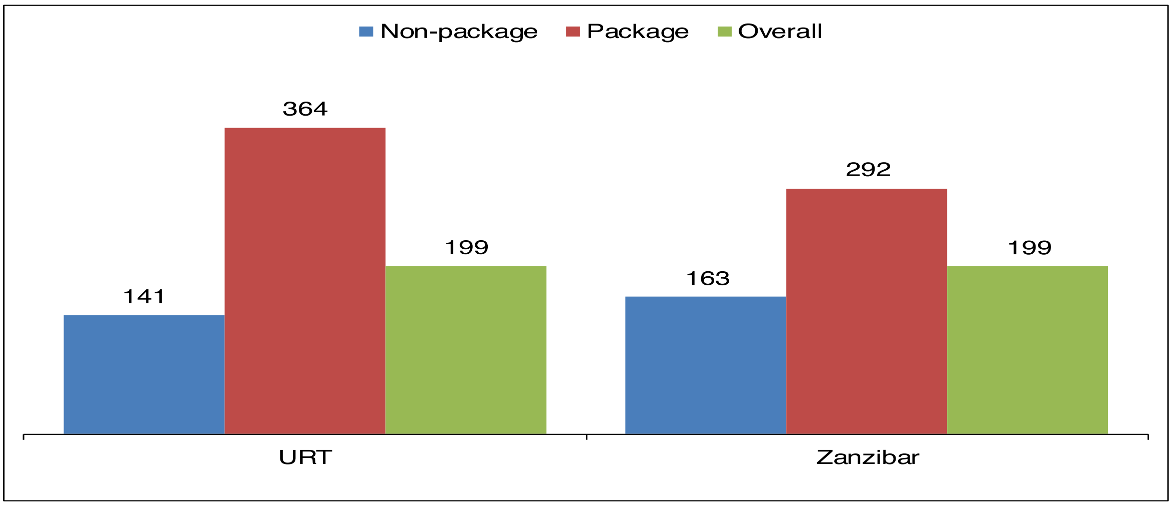


2.13 Average Expenditure

In United Republic of Tanzania, the overall average expenditure per person per night increased by 31 percent to USD 199 from USD 152 recorded in 2020. Visitors who came under the package tour arrangement spent the highest with an average of USD 364, while those who traveled independently spent an average of USD 141. In Zanzibar, overall average expenditure per person per night was USD 199, with package tour spending an average of USD 292 and non-package being USD 163 (**Chart 2.24**).

Chart 2.24: Average Expenditure per Person per Night

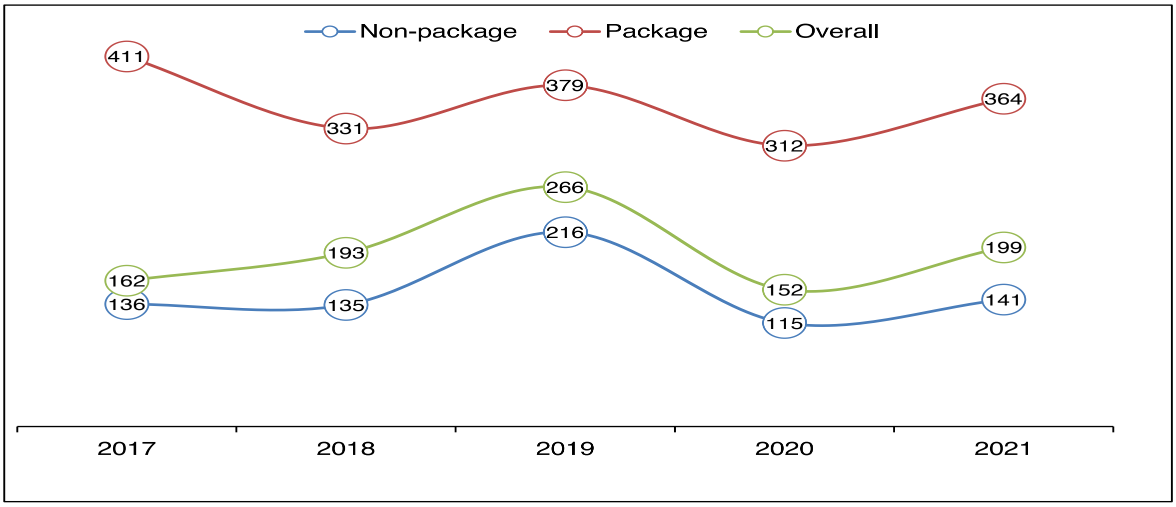
USD



The trends of the average expenditure in the United Republic of Tanzania from 2017 to 2021 depict a similar cyclic pattern with high average expenditure in 2019 and 2021. The low average expenditure in 2020 is largely explained by the outbreak of COVID-19, however, with signs of sector recovery in 2021 (**Chart 2.25**).

Chart 2.25: Trends of Average Expenditures in URT

USD



The average expenditure by purpose of visits in the United Republic of Tanzania indicates that in both travel arrangements, leisure and holidays visitors spent the highest, with an overall average expenditure of USD 350, followed by business visitors. Visitors who came for medical treatment spent the lowest with an average expenditure of USD 64 (**Table 2.16**).

Table 2.16: Average Expenditure by Purpose of Visit and Travel Arrangements, URT

USD per person per night

Purpose	Travel arrangement		Overall
	Non-package	Package	
Business	131	492	312
Leisure and holidays	155	545	350
Medical treatment	64	n.a	64
Visiting friends and relatives	55	236	145
Other	73	360	217

Note: n.a denotes not available

In Zanzibar, business visitors spent the most with overall average expenditure of USD 313 per person per night, followed by holidaymakers (**Table 2.17**).

Table 2.17: Average Expenditure by Purpose and Travel Arrangement, Zanzibar

USD per person per night

Purpose	Travel arrangement		Overall
	Non-package	Package	
Business	121	504	313
Leisure and holidays	142	415	279
Medical treatment	87	n.a	87
Visiting friends and relatives	125	107	116
Other	92	173	132

Note: n.a denotes not available

Looking at average expenditure by activities, the survey's results show that in the United Republic of Tanzania, visitors who came for tourism hunting had the highest overall average expenditure of USD 1,004, followed by bird-watching and business activities (**Table 2.18**). It is worth noting that, the high expenditure for hunting and bird-watching is partly associated with the length of stay, usually visitors spend more time on these activities.

Table 2.18: Average Expenditure per Person per Night by Activity and Travel Arrangements, URT

USD per person per night

Activity	Travel arrangement		Overall
	Non-package	Package	
Academic and scientific	127	n.a	127
Beach	137	228	183
Bird watching	139	1,063	601
Business	151	988	569
Conference	105	256	181
Cultural	122	346	234
Hunting	1,004	n.a	1,004
Medical	72	583	327
Mountain climbing	199	397	298
Shopping	216	n.a	216
Visiting friends and relatives	78	225	152
Wildlife safaris	188	463	325
Other	86	367	227

Note: n.a denotes not available

In Zanzibar, visitors who came for business activities spent the highest with an overall average expenditure of USD 379 per person per night. Other activities with high overall average expenditure were cultural tourism, beach tourism and shopping. As in the case of the United Republic of Tanzania, visitors who came for academic and scientific activities spent the least (**Table 2.19**).

Table 2.19: Average expenditure by activity and travel arrangement, Zanzibar

USD per person per night

Activity	Travel arrangement		Overall
	Non-package	Package	
Academic and scientific	86	n.a	86
Beach	139	227	183
Bird watching	108	n.a	108
Business	379	380	379
Conference	167	n.a	167
Cultural	121	325	223
Medical	n.a	n.a	n.a
Shopping	174	n.a	174
Visiting friends and relatives	105	150	128
Wildlife safaris	176	310	243
Other	109	817	463

Note: n.a denotes not available

The average expenditures of top 15 source markets in the United Republic of Tanzania indicate that visitors from the United States of America had the highest overall average expenditure of USD 311 per person per night. Visitors from Zimbabwe, Spain and France spent on average between USD 200 and USD 248 per person per night, while visitors from

Burundi and Zambia had the lowest average expenditure of USD 67 and USD 69, respectively. In terms of package travel arrangement, visitors from Spain had the highest average expenditure of USD 431, followed by Americans, Kenyans, French and South Africans. With the exception of Zimbabwe, all visitors under the non-package arrangement spent an average of less than USD 200 per person per night (**Table 2.20**).

Table 2.20: Average Expenditure by Top 15 Source Markets, URT

USD per person per night

Country of residence	Travel arrangement		Overall
	Non-package	Package	
France	123	324	209
United States	196	426	311
Kenya	86	375	134
Zambia	69	n.a	69
Congo, DRC	99	144	107
South Africa	106	322	178
Burundi	67	n.a	67
Germany	155	291	200
Spain	104	431	234
Belgium	195	179	189
Zimbabwe	203	307	248
Uganda	94	279	125
Switzerland	155	257	196
Netherlands	108	197	126
Israel	92	207	161

Note: n.a denotes not available

In Zanzibar, visitors from Serbia spent the most with an overall average expenditure of USD 291, followed by visitors from the United States of America and United Arab Emirates. With respect to tour arrangements, package visitors from the United Arab Emirates and Serbia had the highest average expenditure of USD 494 and USD 435, respectively. Under the non-package tour arrangement, visitors from Portugal had the highest average expenditure of USD 250 per person per night (**Table 2.21**).

Table 2.21: Average Expenditure by Top 15 Source Markets, Zanzibar

USD per person per night

Country of residence	Travel arrangement		Overall
	Non-package	Package	
France	134	152	141
South Africa	88	265	132
United States	186	397	277
Spain	109	173	130
Germany	110	187	126
Belgium	164	352	211
Israel	91	122	110
Switzerland	116	247	181
Netherlands	107	186	127
United Arab Emirates	125	494	248
Egypt	161	183	166
Poland	97	197	130
Italy	121	141	127
Portugal	250	76	163
Serbia	219	435	291

2.14 Tourism Earnings

Tourism earnings in the United Republic of Tanzania increased by 83.0 percent to USD 1,310.3 million in 2021, from USD 714.5 million, recorded in 2020. The growth is mainly explained by low base factor as well as increase in international arrivals, particularly from the United States of America, France, Spain and Germany. Out of the total earnings, USD 1,228 million was earned from holidaymakers accounting for about 94 percent (**Table 2.22**). The findings also indicate that about 53 percent of total earnings were received from visitors who came under the package tour arrangement.

Table 2.22: Tourism Earnings by Travel Arrangement and Purpose of Visit, URT

Millions of USD

Purpose of visit	Travel arrangement		Total earnings
	Package	Non-package	
Business	1.8	27.6	29.4
Leisure and holidays	695.3	532.5	1227.8
Visiting friends and relatives	1.9	41.4	43.3
Other	0.6	9.3	9.8
Tourism earnings	699.6	610.8	1310.3
Percent of total	53.4	46.6	

Tourism earnings in Zanzibar increased by 77.6 percent to USD 675.4 million in 2021, compared with USD 380.1 million earned in 2020, largely associated with the increase in the number of visitors and per capita expenditure. Tourists who visited Zanzibar were 318,522, compared to 171,572 in 2020, equivalent to an increase of 85.6 percent. Just like in URT, a large share of earnings was received from leisure and holidays visitors, with business visitors recording the least (**Table 2.23**). Earnings from tourists who came under the non-package tour arrangement accounted for 55.4 percent of the total earnings for Zanzibar.

Table 2.23: Tourism Earnings by Travel Arrangement and Purpose of Visit, Zanzibar

Millions of USD

Purpose of visit	Travel arrangement		Total earnings
	Package	Non-package	
Business	0.1	0.3	0.4
Leisure and holidays	300.7	370.2	670.9
Visiting friends and relatives	0.2	3.4	3.6
Other	0.1	0.4	0.5
Tourism earnings	301.1	374.3	675.4
Percent of total	44.6	55.4	

2.15 Sector Outlook

The latest UNWTO Confidence Index survey indicates that 81 percent of tourism professionals see better prospects for 2022, and that a higher number of experts (48 percent) now see a potential return of international arrivals to the 2019 levels in 2023. However, the resurgence of new variants and the geopolitical tensions in the Eastern Europe could disrupt envisaged recovery of tourism in 2022.

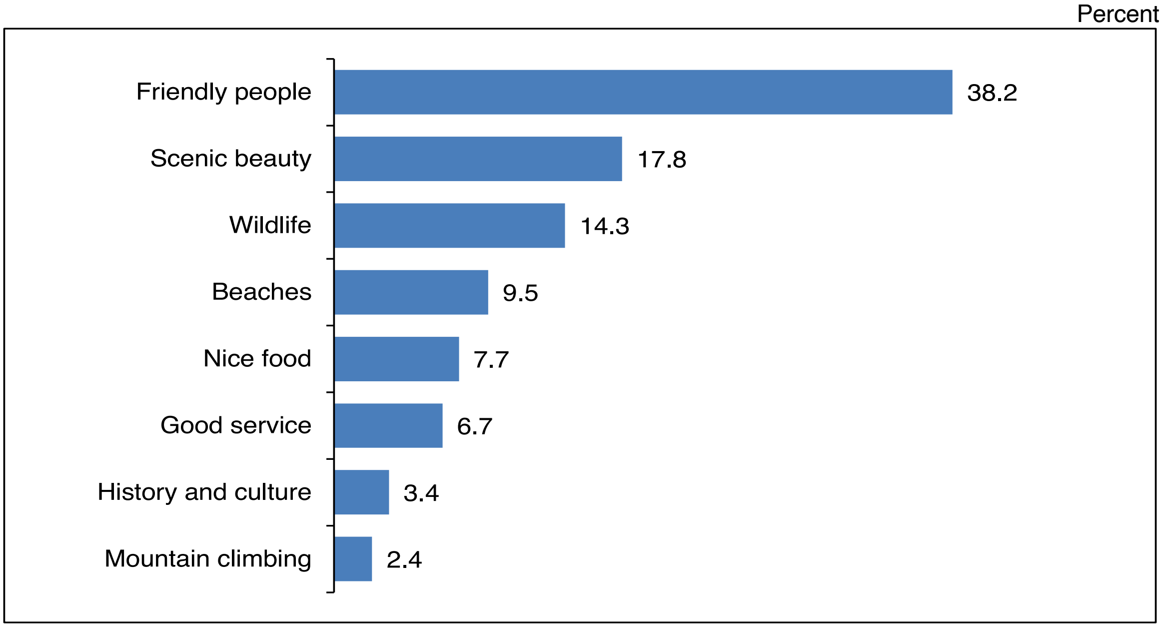
The domestic tourism sector is expected to benefit from the global economic recovery as reflected in the number of international visitors and earnings. The speed of recovery will however depend on the extent of pass-through to the domestic economy of the negative effects of the shocks emanating from geopolitical tensions and supply chain disruptions.

2.16 Visitors Impression and Areas of Improvement

2.16a Visitors' Impression

The survey's results indicate that, Tanzanians are friendly people, who make visitors' holidays a special and memorable event. About 38.0 percent of the visitors revealed that they had excellent experiences with welcoming people. Other things that impressed the visitors were scenic beauty, wildlife, beaches, and delicious food (**Chart 2.26**).

Chart 2.26: Visitors' Impression



2.16b Areas That Need Improvement

Visitors cited areas that need attention to make Tanzania the best destination. They include improvement of roads, particularly those leading to and within attraction sites, air strips, hotel facilities and general cleanliness of public areas. Conservation of the natural attractions was also emphasized. Notwithstanding the concerns, the Government has continued to address these bottlenecks, including the ongoing investments in rail and road infrastructure, which are expected to substantially improve transportation services to and from the tourist attractions. Furthermore, the Government has taken more efforts in developing infrastructure within attractions such as visitor information centers, bridges, helipads, airstrips, and renovation of cultural sites.

Chapter 3: Conclusion and Recommendations

3.1 Conclusion

Tanzania's tourism sector showed recovery in 2021, emanating from both supply and demand effects, with the number of international visitors and earnings to URT increasing by 48.6 percent and 83.4 percent, respectively. As for Zanzibar, they rose by 85.6 percent and 77.7 percent in the same order.

The overall average spending per visitor per night also increased. In URT the overall average expenditure increased by 31 percent to USD 199 per person per night from USD 152 per person per night in 2020. Meanwhile, the average length of stay, remained 10 nights. As for Zanzibar, the average expenditure per person per night was also USD 199, while average length of stay was 8 nights.

The recovery of the tourism sector from the pandemic which started to set in gradually from the second half of 2021, provides positive prospects for 2022 going forward. However, this optimistic projection is threatened by the war in Ukraine.

3.2 Recommendations

The tourism industry is one of the key sources of foreign exchange earnings for Tanzania as it accounts for a large percentage share of the total services receipts, and about 80 percent of total revenue for Zanzibar. Good performance of the sector, therefore, has significant implications to the performance of the economy in general. In this regard, measures to contain the impact of the COVID-19 pandemic as well as the spillover effects of the war in Ukraine cannot be overemphasized. The survey, therefore, identifies key issues of intervention and responsible institutions as summarized in the **Matrix I**.

Matrix I: Summary of Major Policy Issues and Actions

S/n	Key issue	Description	Required intervention	Specification	Responsible Ministry/ Authority
1.	Negative impact of COVID-19 pandemic and war in Ukraine to the tourism sector.	Although the sector is recovering from the negative effects of COVID-19 pandemic, it is still threatened by the war in Ukraine.	Continue to strengthen COVID-19 precaution measures and take action to cushion the economy from the effect of the war.	1. Testing visitors on arrival and continue to sensitize and scale up vaccination. 2. Undertake efforts to enhance promotion and expand tourism markets as well as diversifying products (MICE, cruise ship, beach tourism particularly mainland) domestically and at the regional level.	MNRT, TCT, ZCT
2.	Limited impact of promoting attractions through trade fairs, TV, Embassies, and magazines.	Most visitors learned about attractions in Tanzania through travel agents, tour operators, websites and friends.	Scale up efforts to create awareness of the country's attractions through trade fairs, Embassies, TV and magazines.	1. Enhance collaboration with travel agents and tour operators in strengthening awareness campaign about Tanzania's tourist attractions. 2. Embassies to come up with strategies to advertise tourism attractions in the countries which they represent Tanzania. 3. Closely collaborate with stakeholders to improve marketing and promotion through trade fairs, TV and magazines. 4. Strengthen efforts on e-marketing and other modernised marketing strategies for wider market and product diversification.	MNRT, TTB, ZCT, MICIT, MOFAEAC, MoFP, LGAs
3.	Constant length of stay.	The overall length of stay has remained 10 nights over years.	There is a need to package tourism products in a manner that will incentivise visitors to prolong their stay in Tanzania.	1. Design specialised accommodation facilities and sports activities targeting specific market segments. 2. Design discounted tourism package products.	MNRT, TTB, ZCT, TCT, ZATI, ZATO
4.	Dominance of cash payments.	Majority of visitors continued to settle their bills through cash payments.	Put in place the necessary mechanism to facilitate settlements of bills through non-cash modes.	1. Sensitize service providers to accept non cash payments including credit and debit cards. 2. BOT to liaise with commercial banks and explore the possibility of reducing surcharge on credit/debit card transactions with a view to incentivize non-cash payments.	BOT, MNRT,ZTC,TTB
5.	Small number of repeat visitors.	Majority of visitors particularly from long	Design and diversify tourism products that	1. Construction of convention centres that will attract MICE, which is key to attracting repeat visitors.	MNRT, TTB, ZCT, TCT, ZATI, ZATO

S/n	Key issue	Description	Required intervention	Specification	Responsible Ministry/ Authority
		haul destinations come only once.	will encourage repeat visitors.	2. Design more shopping centres and sports arena to attract repeat visits.	

Appendices

Appendix A: Survey Methodology

I. Introduction

The survey adopted standard methodology for conducting International Visitors' Exit Surveys in Tanzania since 2001. It was designed to collects a wide range of information that would facilitate policy review, planning and decision-making processes. Furthermore, it will assist in promotional efforts in order to attract more visitors. It covered aspects of sample design; survey tools; scope and coverage; training; data collection and processing; and expenditure estimation procedures.

II. 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.

III. Sample Size

The sample survey managed to randomly interview 5,391 respondents, representing 8,796 departing international visitors. This sample was considered sufficient to meet the survey's objectives.

IV. Survey's Coverage

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

V. Training of Interviewers

Prior to fieldwork, a one-day training of enumerators and supervisors was organized for them to understand the questionnaire and the interviewing techniques. A total of 30 interviewers were involved in the training. During the training session, mock interviews were conducted among enumerators to impart the required skills. Enumerators were also trained in methods of field editing, data quality control procedures and fieldwork coordination. The Interviewers' Manual was used as a guideline document during the training.

VI. Data Collection

Following the training of interviewers, eight teams were formed (1 for Zanzibar and 7 for Mainland Tanzania). Data collection exercise was undertaken during the tourist peak season, which normally runs from July to September. It was conducted for two-week period, starting on 15th September 2021. Fieldwork supervision was coordinated by the Technical Committee staff who made visits to the teams to review the work and monitor data quality, including consistency checks and questionnaire completeness.

VII. Interviewers' Manual

The Technical Committee developed the Enumerators' Manual that was used by enumerators as a reference document during the survey. The manual contained information and guidelines on 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 crosschecking mechanism.

VIII. The Questionnaire

The questionnaire was designed to ensure that the questions asked were in line with users' data needs. The information collected is useful for tourism promotion and macroeconomic policy formulation. The content of the questionnaire was mostly similar to the previous years' questionnaire with slight modifications. The questionnaire had 27 questions and it comprised four main parts namely: visitor profiles, travel behavior, expenditure patterns and visitor comments (**Appendix III**).

Questions 1 to 10 aimed at establishing visitor profiles (nationality, country of residence, age group, gender, purpose of visit, type of tourism activity and source of information about Tanzania).

Questions 11 to 18 targeted at obtaining travel behavior namely; type of tour arrangement (package/non-package), items in the package and number of nights spent.

Questions 19 to 22 were structured to establish tourists' earnings ascribed to Tanzania. In addition, the questions probed for details on the amount of money spent in Tanzania as well as the mode of payments used to transact.

Questions 23 to 24 ask visitors if it is their first trip to Tanzania and whether they will come again.

<u>Question 25 and 27</u> seek information from visitors on the areas of impression or improvements and if coronavirus did affect their travel plans.

IX. Data Processing

The processing of the 2021 International Visitors` Exit Survey data began shortly after completion of 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.

X. Tourist Expenditure Estimation

Tourist expenditure in the country was estimated using Tourist Expenditure Model that was developed during the comprehensive visitors' exit survey conducted in 2001. The model uses the following variables: average expenditure by travel arrangement by purpose of visit, proportion of visitor by travel arrangement and average length of the stay.

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 arrivals under **package** travel arrangement (The arrivals as captured by the Immigration Department, adjusted into package visitors by purpose using survey results)

V_{NP} = Number of arrivals under **Non-package** travel arrangement (The arrivals as recorded by the Immigration Department, proportionately adjusted into non-package visitors using survey patterns)

T = Average length of stay as computed from immigration statistics.

The Simplified Model

Country of Residence	Purpose of Visit	Total Visitors (sourced from Immigration Dept)	Visitors by travel arrangement		Avg. length of stay	Avg. expenditure per visitor per night		Total expenditure
						Package	Non Package	
			Package (V_P)	Non-package (V_{NP})	(T)	(E_P)	(E_{NP})	(E_V)
	Business							
	Holiday							
	VFR							
	Other							

Procedure and assumptions used for the estimation of tourist expenditure for 2021;

- Calculation of average package tour expenditure involved deduction of estimated cost for international fare to Tanzania and 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 arrivals by purpose of visit were distributed according to package and non-package arrangements using the travel arrangement ratios as established in the survey.

- To be able to estimate annual tourists' expenditure, survey results were applied to the total number of tourist arrivals as recorded by the Immigration Department. It is worth mentioning that given the homogeneity nature of visitors' characteristics, information collected during the two weeks' survey is justifiable to represent the total population.

- Immigration Department also provides number of tourist arrivals for Zanzibar that enables estimation of tourist expenditure for Zanzibar.

The average length of stay used was between one to twenty-eight nights.

Appendix B: Questionnaire

INTERNATIONAL VISITORS' EXIT SURVEY

Please read the instructions carefully before filling the form.

INTRODUCTION

We hope your stay in Tanzania was a pleasant one and a rewarding experience. Before you leave, you are kindly requested to complete this questionnaire as accurately as you can. The information will help us improve the tourism industry. The Ministry of Natural Resources and Tourism, National Bureau of Statistics, Bank of Tanzania, Immigration Services Department, and the Zanzibar Commission for Tourism are jointly carrying out this survey.

Your cooperation is highly appreciated

***FOR OFFICIAL USE ONLY*:**

NAME OF THE RESEARCHER: ____

*DATE:*_____________ *SIGNATURE:*____

*NAME OF THE DATA ENTRANT:*____

1. Nationality ……...……..…… Country of usual residence ………..…….……

2. Age Group? (tick one only)

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

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

Alone	[ ]
With spouse/partner	[ ]
With children	[ ]
With spouse and children	[ ]
With friends and relatives	[ ]
With parents	[ ]

4. What is the number of persons whom you are travelling with, whose expenses you are sharing? (except yourself)

5. Write the number of persons you shared expenses with by age groups (except yourself)

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

6. Gender

Number of females	
Number of males	

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

Meetings and conference	[ ]	Volunteering	[ ]
Business	[ ]	Leisure and holidays	[ ]
Visiting friends and relatives	[ ]	Medical treatment	[ ]
Scientific and academic	[ ]	Other (please specify)…….	
Religion	[ ]		

8. What were your MAIN activities in Tanzania, in this trip? (list in order of preference, 1 being the most preferred, i.e. 1,2,3)

Wildlife tourism	[ ]	Mountain climbing	[ ]
Beach tourism	[ ]	Hunting tourism	[ ]
Cultural tourism	[ ]	Visiting friends and relatives	[ ]
Business	[ ]	Shopping (for business)	[ ]
Bird-watching	[ ]	Meetings and conferences	[ ]
Medical treatment	[ ]	Other (please specify)……………………..	

9. Which attractions did you visit on this trip? (tick all that apply)

Amboni Caves	[ ]	Mikumi	[ ]	Ruaha	[ ]	Ngorongoro	[ ]
Arusha Nat. Park	[ ]	Selous	[ ]	Manyara	[ ]	Stone town	[ ]
Kaole ruins	[ ]	Tarangire	[ ]	Mt Kiliman	[ ]	Museums	[ ]
Udzungwa	[ ]	Serengeti	[ ]	Gombe	[ ]	Beaches	[ ]
Other (please specify)	[ ]						

10. What was the MAIN source of information about Tanzania? (tick one only)

Travel agents/ Tour operators	[ ]	Inflight magazines	[ ]
Friends/relatives	[ ]	Tanzania's missions abroad	[ ]
Trade fair	[ ]	Radio station (please specify)………	[ ]
Newspapers. Magazines, brochures	[ ]	TV i.e: CNN, BBC, Safari Channel (please specify)……….	[ ]
Travel advisory	[ ]	Other (please specify)…………..	

11. Did you travel in package tour or independently?
(*If you travelled independently, go to question 16*)

Package	Independently

12. If travelled in package tour, what items were included in your package (tick all that apply)

International transport	[ ]	Sightseeing/excursion/game ctivities	[ ]
Accommodation	[ ]	Guided tour	[ ]
Food and drinks	[ ]	Travel insurance	[ ]
Internal transport while in Tanzania	[ ]	Other (please specify)……………………	

13. Total cost of the package tour:
Currency ......…....…....

14. Is the total cost for the whole group? (tick)
Yes [ ] No [ ]

15. Total number of nights INCLUDING nights spent in other countries

16. Number of nights spent in:
Tanzania Mainland
Zanzibar Islands

17. What is the cost of international transport (Return air ticket) per person?
Currency…………….

18. What was your first point of entry to Tanzania? (*tick*)
Tanzania Mainland
Zanzibar Islands

19. How much money did you spend in Tanzania during this trip including cash, traveller's cheques, charge cards?
(*Please give your best estimate in case you do not remember the exact figures*)

Currency … [ ]

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

Items	**Currency code**	**Amount**
Hotels		
Others (Lodges, Motels, Campsites etc.)		
Food and drinks		
Internal transportation while in Tanzania		
By Air		
By Road		
By Water		
By Railway		
Rentals (Car hires, Charters, Boats, etc)		
Cultural services (Museums, Historical sites, etc.)		
Sports and recreational		
Diving, snorkelling and water games		
Sightseeing and excursion		
Mountain climbing		
Hunting		
Access/entry/gate fees		
Visa fees and taxes		
Fuel (International Transit vehicles)		
Charges related to international vehicle pick up		
Souvenirs (gifts), precious metals, crafts, etc.		
Tips		
Donations		
Shopping		
Others (please specify): ……………………………..		

21. Is the above breakdown for the whole party? (Tick) Yes [ ] No [ ]
22. Which modes of payment did you use mostly in Tanzania? (Tick one only)

Cash [ ] Traveler's Cheques [ ]
Credit Card [ ] Other (please specify) ……........................

23. Is this your first trip to Tanzania? (Tick) Yes [ ] No [….]

24. Will you come again? Yes [ ] No [ ]

25. What impressed you most during your trip to Tanzania? (Please specify)

……………..…...……………...…………………………………………………..……………
……………..…...……………...…………………………………………………..……………

26. What would you consider the most important areas that need improvements? (Please specify)

………
………
………
………

27. Did the Coronavirus pandemic affect your travel plan to Tanzania? Yes [ ] No [ ]
Please explain

………
………
………
………

Appendix C: International Visitors' Arrival by Country of Residence

Country	Visitors	Percent
France	1,349	15.34
United States	1,016	11.55
Kenya	888	10.10
Zambia	522	5.93
Congo, The Democratic Republic Of The	480	5.46
South Africa	447	5.08
Burundi	411	4.67
Germany	392	4.46
Spain	331	3.76
Belgium	329	3.74
Zimbabwe	258	2.93
Uganda	248	2.82
Switzerland	165	1.88
Netherlands	163	1.85
Israel	154	1.75
India	121	1.38
United Arab Emirates	113	1.28
Poland	88	1.00
Canada	88	1.00
Italy	86	0.98
Rwanda	85	0.97
Egypt	79	0.90
Denmark	65	0.74
United Kingdom	59	0.67
Portugal	53	0.60
Serbia	50	0.57
Russian Federation	42	0.48
Austria	40	0.45
Australia	34	0.39
Nigeria	33	0.38
Brazil	27	0.31
Ukraine	24	0.27
Luxembourg	23	0.26

Country	Visitors	Percent
Turkey	23	0.26
Albania	23	0.26
Ethiopia	23	0.26
Comoros	22	0.25
Sweden	21	0.24
Czech Republic	20	0.23
Ghana	19	0.22
Syrian Arab Republic	19	0.22
Norway	18	0.20
Hungary	16	0.18
Mexico	14	0.16
Sudan	14	0.16
China	14	0.16
Romania	13	0.15
Saudi Arabia	12	0.14
Malawi	12	0.14
Ireland	11	0.13
Oman	11	0.13
Mozambique	11	0.13
Qatar	10	0.11
Slovakia	9	0.10
Botswana	8	0.09
Latvia	8	0.09
Lithuania	8	0.09
Finland	8	0.09
Indonesia	8	0.09
Pakistan	7	0.08
Chile	6	0.07
South Sudan	6	0.07
Tunisia	6	0.07
Bahrain	6	0.07
Lebanon	6	0.07
Greece	6	0.07
Kazakstan	6	0.07

Country	Visitors	Percent
Croatia	6	0.07
Morocco	5	0.06
Jordan	5	0.06
Belarus	5	0.06
Afghanistan	4	0.05
Sri Lanka	4	0.05
Estonia	4	0.05
Colombia	4	0.05
Algeria	4	0.05
Slovenia	4	0.05
Japan	4	0.05
Madagascar	4	0.05
Thailand	3	0.03
Guatemala	3	0.03
Cyprus	3	0.03
Cameroon	3	0.03
Burkina Faso	3	0.03
Niger	3	0.03
Angola	2	0.02
Costa Rica	2	0.02
Kuwait	2	0.02
Korea, Democratic People's Republic Of	2	0.02
Namibia	2	0.02
Cote D Ivoire	2	0.02
Bulgaria	2	0.02
Argentina	2	0.02
Andorra	2	0.02
Gabon	2	0.02
Mauritius	2	0.02
Armenia	1	0.01
Eritrea	1	0.01
Iraq	1	0.01
Bolivia	1	0.01
Uruguay	1	0.01

Country	Visitors	Percent
Mali	1	0.01
New Zealand	1	0.01
Reunion	1	0.01
Singapore	1	0.01
Swaziland	1	0.01
Cuba	1	0.01
Chad	1	0.01
Philippines	1	0.01
Solomon Islands	1	0.01
Iran, Islamic Republic Of	1	0.01
Congo-Brazzaville	1	0.01
	8,796	100.00

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