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# THE 2025 INTERNATIONAL VISITORS' EXIT SURVEY REPORT

# TANZANIA TOURISM SECTOR SURVEY

## THE 2025 INTERNATIONAL VISITORS' EXIT SURVEY REPORT

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## ACRONYMS

| | |
|---|---|
| ESQR | European Society for Quality Research |
| MNRT | Ministry of Natural Resources and Tourism |
| NBS | National Bureau of Statistics |
| TANAPA | Tanzania National Parks Authority |
| TATO | Tanzania Tour Operators |
| TTB | Tanzania Tourist Board |
| UNDP | United Nations Development Programs |
| UNWTO | United Nations World Tourism Organization |
| URT | United Republic of Tanzania |
| VAT | Value Added Tax |
| VFR | Visiting Friends and Relatives |
| WTA | World Travel Awards |
| WTTC | World Travel and Tourism Council |
| ZAA | Zanzibar Airport Authority |
| ZATI | Zanzibar Association of Tourism Investors |
| ZATO | Zanzibar Association of Tour Operators |
| ZCT | Zanzibar Commission for Tourism |

## TANZANIA TOURISM PROFILE

Tanzania, located in East Africa, is renowned for its breathtaking landscapes, diverse wildlife, and rich cultural heritage. With its stunning natural attractions, including the Mount Kilimanjaro, the Serengeti National Park, and Zanzibar's pristine beaches. Tanzania has become a premier destination for travelers seeking adventure, wildlife safaris, and cultural experiences.


**Geographical Features:** Tanzania boasts a varied landscape, ranging from the snow-capped peaks of Mount Kilimanjaro, Africa's highest mountain, to the vast savannahs of the Serengeti plains. The country is also home to the spectacular Ngorongoro Crater, a UNESCO World Heritage Site, and the renowned Selous Game Reserve, one of the largest protected areas in Africa. Along its coastline lie idyllic islands such as Zanzibar, famous for its spice farms, white sandy beach and historical Stone Town.

**Wildlife and Safaris:** Tanzania is blessed with wildlife safaris, offering unparalleled opportunities to witness the "Big Five" (lion, elephant, buffalo, leopard, and rhinoceros) in their natural habitat. The Serengeti National Park hosts the annual Great Migration, where millions of wildebeest and zebras traverse the plains in search of water and grazing grounds. Other popular wildlife destinations include Tarangire National Park, Lake Manyara National Park, and the remote Ruaha National Park.

**Cultural Diversity:** Tanzania is a melting pot of cultures, with over 120 ethnic groups speaking various languages and practicing diverse traditions. Visitors can immerse themselves in the vibrant Maasai culture, known for its colorful attire, traditional dances, and pastoral way of life. The Swahili culture, influenced by centuries of trade and interaction along the East African coast, which is prevalent in coastal cities like Dar es Salaam and Zanzibar—with its unique blend of Arab, Indian, and African elements.

**Adventure Tourism:** For adrenaline enthusiasts, Tanzania offers a plethora of adventure activities. Climbing Mount Kilimanjaro—the highest freestanding mountain in the world, which is a bucket-list experience for many. The country's numerous national parks and reserves provide opportunities for hiking, hot air ballooning, birding, and even chimpanzee trekking in the lush forests of Gombe Stream and Mahale Mountains National Parks.

**Marine Tourism:** Tanzania's coastline along the Indian Ocean is a haven for marine enthusiasts. Visitors can explore pristine coral reefs teeming with marine life while snorkeling or diving in destinations like Mafia Island and the Mnemba Atoll. The turquoise waters surrounding Zanzibar offer excellent opportunities for water sports such as sailing, kiteboarding, and deep-sea fishing.

**Infrastructure and Hospitality:** Tanzania has made significant investments in its tourism infrastructure, with a wide range of accommodations to suit every budget and preference. From luxury lodges and tented camps in the wilderness to boutique

hotels and beach resorts along the coast, visitors can find comfortable accommodations that complement their travel experience. Tanzanian hospitality is renowned for its warmth and friendliness of people, ensuring that guests feel welcome and well taken care of throughout their stay.

Generally, Tanzania's tourism sector continues to attract travelers from around the globe with its unparalleled natural beauty, rich cultural heritage, and diverse range of experiences. With the ongoing conservation initiatives, and infrastructure improvements, Tanzania is poised to remain a top destination for adventure seekers, wildlife enthusiasts, and cultural explorers for years to come.

## GLOSSARY

**Arrivals** - the number of visitors reaching the destination, regardless of the duration of their visit.

**Attractions** - are the places, people, events, and things that offer leisure and amusement to tourists at the destinations.

**Average length of Stay** - the average number of nights that visitors spend in a destination. Business

**Visitor** - a business visitor is a visitor whose main purpose for a tourism trip corresponds to the business and professional category of purpose.

**Country of reference** - the country of reference refers to the country for which the measurement is done.

**Cultural tourism** - is the subset of tourism concerned with a country or region's culture, specifically the lifestyle of the people in those geographical areas, the history of those peoples, their art, architecture, religion(s), and other elements that helped shape their lives.

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

**Excursionist** - the (same-day visitor) is a non-resident visitor arriving and departing from a country within the span of a single day.

**Inbound tour operator** - a tourism operator, who usually serves travelers arriving from overseas. **Inbound tourism** - comprises the activities of a non-resident visitor within the country of reference.

**Independent/Non-package Tour** - self-travel arrangement that does not include prearrangements and all items and service purchased at host destination.

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

**Place of usual residence** - is the geographical place where the enumerated person usually resides and is defined by the location of his/her principal dwelling.

**Purpose of visit** – refers to the reason that necessitates the trip, in the absence of which the trip would not have taken place.

**Tourism expenditure** - is the amount paid for the acquisition of consumption goods and services, as well as valuables, for own use or to give away, for and during tourism trips. These include expenses incurred directly by visitors themselves, as well as costs covered or reimbursed by third parties.

## FOREWORD

The Executive Committee of the Tanzania Tourism Sector Survey is pleased to present the *2025 International Visitors' Exit Survey Report*, marking the twenty-fifth edition since the survey's inception in 2001.

This collaborative effort was undertaken by the Ministry of Natural Resources and Tourism (MNRT), the Bank of Tanzania (BOT), the National Bureau of Statistics (NBS), the Immigration Services Department, and the Zanzibar Commission for Tourism (ZCT). The primary objective of the survey is to collect up-to-date information on tourist expenditures, which is vital for estimating international tourism receipts used in the compilation of National Accounts (NA) and Balance of Payments (BOP) statistics. Beyond this, the data provides valuable insights for both the public and the private sector in shaping policies and guiding strategic business decisions.

The 2025 findings reveal notable progress in Tanzania's tourism industry, highlighted by a significant rise in tourism earnings and international visitors. Most respondents expressed high levels of satisfaction with Tanzania as a distinctive, high-quality destination, praising the warmth of its people and the country's extraordinary natural beauty. At the same time, some visitors underscored the importance of continued investment in the infrastructure, particularly roads, airports, and tourism-related facilities, to further enhance the visitor experience.

We are confident that this report will serve as a vital resource for stakeholders across the tourism sector, supporting informed planning, improved service delivery, and the maximization of receipts generated by this cornerstone of Tanzania's economy.

**Dr. Hassan Abbas**
**Permanent Secretary**
**Ministry of Natural Resources and Tourism**

**Mr. Emmanuel. M. Tutuba**
**Governor**
**Bank of Tanzania**

## ACKNOWLEDGEMENT

The Steering Committee of the Tanzania Tourism Sector Survey extends its sincere appreciation to the many stakeholders, both within and beyond the collaborating institutions, whose contributions were pivotal to the successful completion of the International Visitors' Exit Survey for 2025. We are especially grateful to the travelers who voluntarily participated in the survey. Their candid feedback and valuable insights have been instrumental in shaping this report and are deeply appreciated.

The Committee also wishes to recognize the staff of the Immigration Services Department at the departure points of Julius Nyerere International Airport, Abeid Amani Karume International Airport, Kilimanjaro International Airport, Horohoro, Namanga, Tunduma, Mtukula, and Manyovu. Their cooperation and support during the two weeks of data collection were invaluable.

We further acknowledge the commitment and guidance provided by the Chief Executive Officers of the participating institutions: the Ministry of Natural Resources and Tourism (MNRT), the Bank of Tanzania (BOT), the National Bureau of Statistics (NBS), the Immigration Services Department (ISD), the Zanzibar Commission for Tourism (ZCT), and the Tourism Confederation of Tanzania (TCT).

The dedicated team responsible for producing this report was led by Edward Mtarima Kohi (Director of Research and Training Unit – MNRT), Theresa Mugobi (Director of Tourism – MNRT), and Suleiman Missango (Director, Economic Research and Policy – BOT). Other members of the Steering Committee include Daniel Masolwa (Director of Economic Statistics – NBS), Mohamed Bakari (Deputy Commissioner, Head of Statistics Section – ISD), and Aviwa Issa (Director of Human Resource, Planning and Administration – ZCT).

Survey data analysis and report writing were conducted by the Technical Team, under the leadership of Paskasi Mwiru (MNRT) and Villela Waane (BOT). The team members include Placydia Kamazima, Phillip Mboya, Tumaini Longishu, Sheila Mussa, Yohana Luhasile, Taimur Kattanga, Lugano Mwamakimbula, Gloria Mbiha, Gabriel Mafie, Julius Moshi, Rohi Nkwama, George Mwansasu, Finyahrua John, and Rweyemamu Barongo from BOT; Josephat Msimbano from MNRT; Valerian Tesha, Eliaranya Lema, and Jovitha Rugemalila from NBS; Kassian Magige from ISD; and Maabad Jaffer from ZCT.

## EXECUTIVE SUMMARY

This section provides a summary of global and Tanzania tourism developments as well as findings of the 25th cycle of the International Visitors' Exit Survey that was conducted in 2025.

### Global tourism developments

Global tourism fully recovered in 2025, with international arrivals reaching 1.52 billion, about 60 million visitors higher than in 2024. This recovery was supported by strong demand from major source markets, increased air connectivity, improved visa facilitation, and continued recovery across Asia and the Pacific.

### Tourism developments in Tanzania

Tanzania's tourism industry continued to demonstrate resilience and sustained growth, reaffirming its role as a key driver of foreign exchange earnings and overall economic development. The sector recorded increased international tourist arrivals and earnings, reflecting a strong recovery from the COVID-19 pandemic and sustained global demand for Tanzania's tourism products. In 2025, Tanzania's tourism earnings grew by 13 percent to USD 4,410.6 million, up from USD 3,903.1 million in 2024. This performance was supported by an increase in tourist arrivals and per capita spending. During the period, the number of international tourist arrivals rose from 2,141,895 in 2024 to 2,294,495 in 2025, an increase of 7.1 percent.

A number of activities and events took place in 2025 that have a positive bearing in the tourism industry include:

i. Tanzania secured an unprecedented victory in the World Travel awards, highlighting the country's growing appeal and exceptional efforts in promoting sustainable tourism, preserving its rich natural heritage.

ii. Tanzania hosted the 32nd World Travel Awards (WTA) Africa & Indian Ocean Gala Ceremony in June 2025.

iii. The Serengeti National Park was named World's Leading National Park in 2025.

iv. The European Quality Choice Diamond awarded Tanzania National Parks (TANAPA) a trophy for its highest level of tourism service provisions in 2025.

v. Tanzania ranked fourth in natural beauty and entered the group of 10 countries listed for natural beauty in the world.

vi. The Government of the United Republic of Tanzania in collaboration with the United Nations (UN) and the Basque Culinary Centre organized the 2nd UN Tourism Regional Forum on Gastronomy Tourism for Africa.

vii. Tanzania hosted a Diplomatic Safari and Tour for 25 diplomats, aiming to showcase its major tourist attractions, strengthening international relations and promote tourism sector.

## Methodology

The survey aimed at collecting uptodate information on tourist expenditures, a key input for estimating international tourism receipts used in compiling National Accounts (NA) and Balance of Payments (BOP) statistics. It targeted international visitors departing the country through major exit points during the survey period. Data were collected at eight key locations—international airports and some land border posts—that handle the majority of departing international visitors. Using random sampling, the survey successfully interviewed 10,309 respondents, representing a total of 22,838 departing visitors.

Fieldwork was carried out during the peak tourism season in August 2025 to ensure that the survey records a representative sample of visitors. All responses were carefully edited, and consistency checks were performed prior to analysis. To estimate tourism earnings, survey results were populated using Tourist Expenditure Model, together with the total number of tourist arrivals recorded by the Immigration Services Department in 2025.

## Main Findings of the 2025 International Visitors' Exit Survey

i. Tourism earnings in URT increased by 13 percent to USD 4,410.6 million in 2025, from USD 3,903.1 million in 2024. Tourism earnings in Zanzibar were USD 1,190.8 million in 2025 compared with USD 997.8 million in 2024, supported by an increase in the number of international visitors.

ii. In URT, overall average expenditure rose by 19 percent to USD 289 per person per night, from USD 243 in 2024. Similarly, in Zanzibar overall average expenditure per person per night increased by 9 percent to USD 274 from USD 251 in 2024.

iii. The United States of America, Italy, and France were the leading source markets in URT. In Zanzibar, Italy, France, and the United Kingdom led.

iv. Leisure and holidays remained the main purpose of visit in both URT and Zanzibar, accounting for 64.6 percent and 92.9 percent, respectively. Holiday makers mostly preferred the package tour arrangement, whereas business and VFR visitors preferred the non-package tour arrangement.

viii. The overall average length of stay was 9 nights in URT and 6 nights in Zanzibar.

ix. Main tourism activities were wildlife safaris, beach, visiting friends and relatives, and business. Consistently, Ngorongoro, Serengeti, Stone Town, beaches, and Tarangire continued to be the most visited attractions.

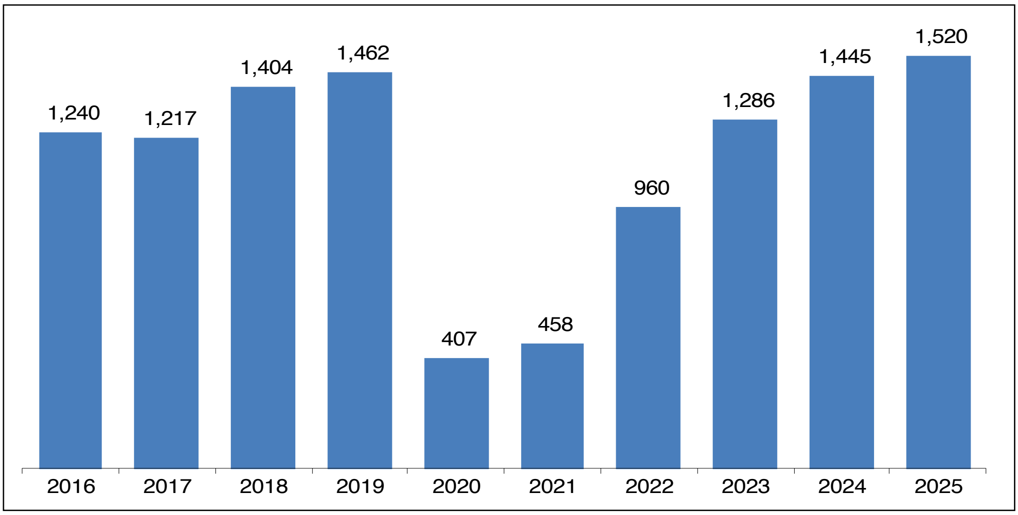
# Chapter 1: Recent Developments in the Tourism Industry

## 1.1 Global Perspective

Global tourism arrivals reached 1.52 billion in 2025, nearly 60 million visitors more than in 2024, equivalent to 4 percent annual growth. This growth was supported by strong demand from the major source markets, increased air connectivity, improved visa facilitation, and continued recovery across Asia and the Pacific.[1] 2025 marks a new record year for international tourist arrivals in the post-pandemic era (Chart 1.1).

**Chart 1.1: Global International Tourist Arrivals, 2016 - 2025**

In Millions




Source: UNWTO Barometer, January 2026

All regions recovered from the pandemic effects (Table 1.1). Europe continues to dominate as the leading destination region, accounting for more than half of all arrivals, while the Asia-Pacific and Africa regions recorded strong growth owing to improved air connectivity, easing of travel restrictions, and rising demand for cultural and nature-based tourism. Africa emerged as a fast-growing region, attracting over 80 million visitors, driven by wildlife tourism and heritage experiences. Despite challenges such as inflation in travel services and geopolitical uncertainties, the overall upward trend demonstrates the resilience of the tourism sector.

1 UNWTO Barometer (January 2026)

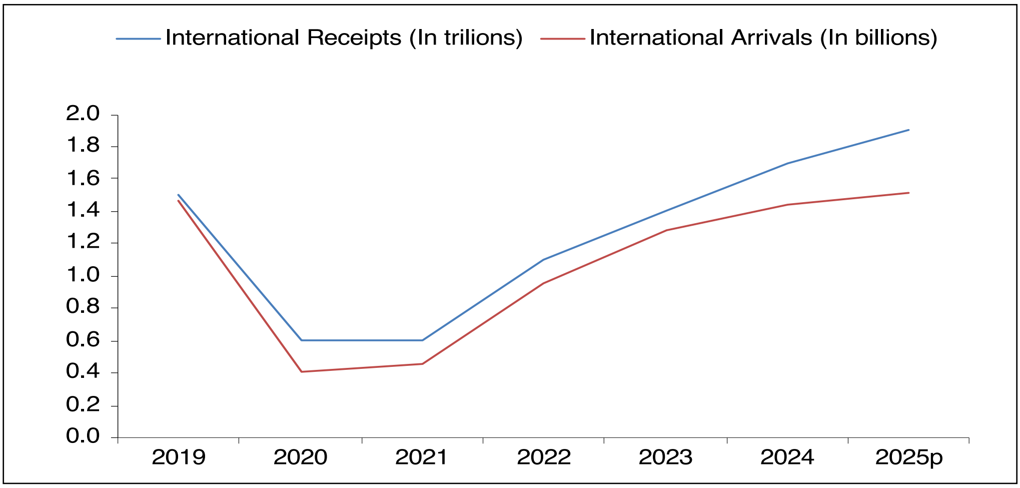
**Table 1.1: International Tourist Arrivals by Regions; 2019 – 2025**

| Region | Arrivals (Million) | | | | | | | Recovery from 2019(%) | |
|---|---|---|---|---|---|---|---|---|---|
| | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2024 | 2025 |
| World | 1,462 | 407 | 458 | 960 | 1,286 | 1,445 | 1,520 | 99 | 104 |
| Europe | 742 | 240 | 301 | 597 | 700 | 747 | 793 | 101 | 107 |
| Asia and the Pacific | 360 | 59 | 25 | 92 | 233 | 316 | 331 | 88 | 92 |
| Americas | 219 | 70 | 82 | 167 | 198 | 214 | 215 | 98 | 98 |
| Africa | 69 | 19 | 20 | 48 | 66 | 74 | 81 | 107 | 117 |
| Middle East | 71 | 19 | 30 | 68 | 87 | 95 | 100 | 134 | 141 |

Source: UNWTO Barometer, January 2026

In 2025, international tourism receipts registered a robust growth consistent with the increase in tourist arrivals (Chart 1.2). Tourism receipts rose by 5 percent to USD 1.9 trillion, up from USD 1.7 trillion in 2024.[2]. This outturn was built on an already strong performance in 2024, coupled with many destinations posting a higher increase in receipts than arrivals, reflecting higher visitors' per capita spending. Destinations reporting solid growth in 2025 include Morocco (19 percent), the Republic of Korea (18 percent), Egypt (17 percent), Mongolia (15 percent), Japan (14 percent), Latvia (11 percent), and Mauritius (10 percent). Meanwhile, global tourism export revenues (tourism receipts and passenger transport) reached a record high of USD 2.2 trillion in 2025, in the past five years (Chart 1.3).

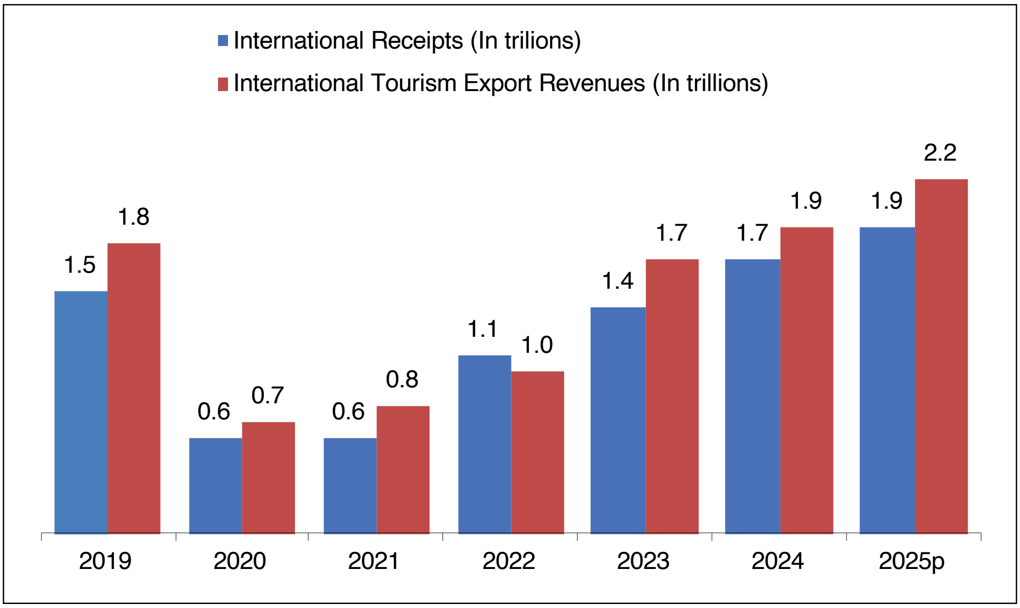
**Chart 1.2: International tourist arrivals and receipts**




Source: UNWTO Barometer, January 2026

2 The 2025 international tourism receipts are provisional

**Chart 1.3: Global tourism Revenues**




Source: UNWTO Barometer, January 2026
Note: p denotes Provisional

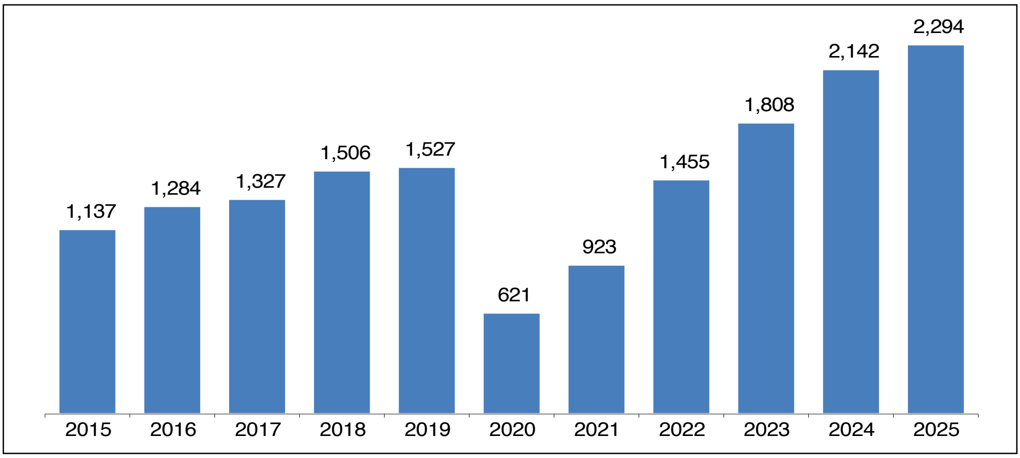
## 1.2 Tanzania's Perspective

### 1.2.1 Tourism Performance

Tanzania's tourism industry has continued to demonstrate resilience and sustained growth, reaffirming its position as a vital driver of foreign exchange earnings and overall economic development. The sector recorded a notable increase in international tourist arrivals and earnings, underscoring a strong recovery from the COVID-19 pandemic and reflecting the enduring global demand for Tanzania's diverse tourism attractions. In 2025, Tanzania's tourism earnings reached a historic high, growing by 13 percent to USD 4,410.6 million up from USD 3,903.1 million in 2024. This performance was supported by increase in tourist arrivals and per capita spending. During the period, the number of international tourist arrivals, rose from 2,141,895 in 2024 to 2,294,495 in 2025, an increase of 6.7 percent (Chart 1.4). The sector fully recovered and surpassed the COVID-19 pandemic era, with the number of tourist arrivals registering a recovery of more than 150 percent from the 2019 levels, owing to robust global demand, improved air connectivity, and intensified efforts to promote Tanzania as a premier destination.

**Chart 1.4: International Tourist Arrivals in Tanzania, 2015-2025**

In Millions




Source: Immigration Services Department (ISD)

### 1.2.2 In 2025, a number of activities and events were held that contribute positively to tourism:

#### 1.2.2.1 Tanzania Triumphs at the 2025 World Travel Awards

Tanzania has made history at the 2025 World Travel Awards by securing an unprecedented victory, surpassing other strong contenders like Botswana, Kenya, Namibia, and South Africa.

During the World Travel Awards Grand Finals, which took place on 6th December 2025 in Bahrain, Tanzania won 18 awards, out of which the Ministry of Natural Resources and Tourism received four Awards, *namely the World's Leading Safari Destination – Tanzania; World's Leading National Park 2025 – Serengeti National Park; African's Best Cooperate Retreat Destination-ZANZIBAR and Africa's Leading Destination- Tanzania*.

This success highlights the country's growing appeal and exceptional efforts in promoting sustainable tourism, preserving its rich natural heritage, and enhancing its tourism infrastructure, setting a new benchmark for the industry across Africa and beyond. The country has made significant strides in the global tourism sector, with the country recently securing various prestigious international tourism awards. These accolades, not only highlight Tanzania's rising profile, but also position the country as a premier destination for nature-based tourism, further elevating its standing in the competitive global tourism market.

*The Permanent Secretary, Ministry of Natural Resources and Tourism, Dr. Hassan Abbasi with one of several World Travel Awards 2025 trophies in Bahrain*

Tanzania's sweeping success at WTA 2025 signals a resurgence, a rebranding of the nation as a diversified, world-class travel destination that balances wild adventure with luxury, conservation with comfort, and tradition with accessibility. The 2025 World Travel Awards were subsequently presented to Her Excellency Dr. Samia Suluhu Hassan, President of the United Republic of Tanzania and His Excellency Dr. Hussein Ali Mwinyi, President of Zanzibar and Chairman of the Revolutionary Council.


*Their Excellencies proudly receiving the 2025 World Travel Awards*

### 1.2.2.1 Tanzania hosts World Travel Awards Africa and Indian Ocean Gala Ceremony 2025

Tanzania tourism sector reached a new milestone when it was chosen to host the 32nd World Travel Awards (WTA) Africa and Indian Ocean Gala Ceremony on 28th June 2025**.** This prestigious event is considered among the most important annual gatherings in global tourism and often described as the “Oscars of the travel industry”, which brought together leading tourism figures from across the globe, including government officials, travel and hospitality professionals, industry experts, tourism stakeholders and international media from across Africa and the Indian Ocean region. Hosting this esteemed event not only elevated Tanzania’s profile on the global tourism map but also demonstrated its commitment to excellence, innovation, and sustainable tourism development.

The Former Minister for Natural Resources and Tourism, Hon. Ambassador Dr. Pindi Chana, officially launched the event, at Johari Rotana, Dar es Salaam. This inauguration also marks the opening leg of the WTA’s Grand Tour 2025, where a global series of prestigious events follow, including travelling to iconic destinations such as Cancun (Mexico), Saint Lucia, Hong Kong, Sardinia (Italy), Dubai (UAE) and concluding in the Grand Finale in Bahrain.

*Hon. Ambassador Dr. Pindi Chana at the opening ceremony of the 32nd World Travel Awards (WTA) Africa & Indian Ocean Gala Ceremony at Johari Rotana in Dar es Salaam*

### 1.2.2.2 TANAPA wins the EU Quality Choice Diamond Prize 2025

Tanzania National Parks (TANAPA) has once again scooped the prestigious European Quality Choice Diamond award in 2025, for its highest level of tourism service provisions, elevating Tanzania's stature as a premier tourist destination. The illustrious award, conferred by the renowned European Society for Quality Research (ESQR) on 29th May 2025 during a high-profile Gala dinner and awards ceremony held in Stockholm, Sweden, marks the sixth consecutive win for TANAPA. These consecutive awards attest its exemplary and all-inclusive best practices in the tourism service provisions and conservation initiatives.

TANAPA, is among ISO 9001:2015-certified institutions in Tanzania, actively promoting sustainable tourism practices that enhances visitor experiences, improve wellbeing of local communities, and contribute to national economic growth. The award was received by Tanzania Ambassador to Sweden, His Excellency, Amb. Obhare Matinyi.


*Ambassador Obhare Matinyi and the TANAPA delegation during award giving ceremony*

### 1.2.2.3 Tanzania named among the Most Beautiful Countries by UK survey

Tanzania ranked fourth globally for natural beauty and entered the top 10 countries worldwide in this category. According to the World Report on Natural Beauty published by a UK survey, which compiled statistics and traveler insights, Tanzania secured its position with a score of 6.98 out of 10. Tanzania's ranking among the world's top ten countries for natural beauty was supported by its diverse landscapes, including Mount Kilimanjaro, Mount Meru, Oldoinyo

Lengai, and extensive natural forests. Iconic sites such as the Ngorongoro Crater and Serengeti National Park, along with rich biodiversity of birds and plants, further reinforced its position. The presence of vast protected areas—including 3,580 square kilometres of Matumbawe rocks and over 307,000 square kilometres of preserved land—also contributed to the recognition. In the same competition, Indonesia secured the first place with 7.77 points, followed by New Zealand 7.27, Colombia 7.16. Kenya ranked 6$^{th}$ place with 6.7 points.

#### 1.2.2.4 The visits of Miss World and Miss World Africa

Tourism is a cornerstone of Tanzania's economy, and in recent years the country has adopted innovative strategies to enhance its global appeal. One of the most notable initiatives has been leveraging celebrity influence to position Tanzania as a premier travel destination. As part of this effort, the country welcomed Miss World 2025, Opal Suchata of Thailand, accompanied by Miss World Africa 2025, Hasset Dereje of Ethiopia, and Julia Morley, President of the Miss World Organization. Their visit to Tanzania was a deliberate tourism marketing initiative designed to showcase the nation's cultural heritage, natural beauty, and hospitality to a worldwide audience. They both met with Her Excellency President of United Republic of Tanzania, Dr. Samia Suluhu Hassan and His Excellency President of Zanzibar. Dr. Hussein Ali Mwinyi. The strategic use of celebrities in tourism marketing serves several key purposes. It enhances global visibility, strengthens destination branding and supports high value tourism and investment. This growing international recognition is further reflected in Tanzania's selection to host the World Travel Awards in 2026, and its preparations to host Miss World in 2027.

*Visits of Miss World 2025, Opal Suchata of Thailand, accompanied by Miss World Africa 2025, Hasset Dereje of Ethiopia*

### 1.2.2.5 Diplomatic Safari and Tour

Tanzania hosted a first historic Diplomatic Safari and Tour for ambassadors, diplomats, and representatives of international organizations aiming to showcase the country's major tourist attractions, strengthen international relations and promote the tourism sector. The tour was jointly organized by the Ministry of Foreign Affairs, the Tanzania Tourist Board (TTB), the Zanzibar Commission for Tourism (ZCT), and other key stakeholders, including investors and private tourism companies. The tour took place from April 11 - 15, 2025 and culminated in a closing ceremony at the Aldiana Hotel in Kizimkazi, Zanzibar. The event was presided over by His excellency Dr. Hussein Ali Mwinyi, the President of Zanzibar and Chairman of the Revolutionary Council, with the presence of various officials from the ministries responsible for Tourism, from both sides of the union.

*His Excellency Dr. Hussein Ali Mwinyi, the President of Zanzibar and Chairman of the Revolutionary Council with the Diplomatic Missions*

By hosting foreign diplomats to experience iconic attractions such as the Serengeti National Park, the Ngorongoro Conservation Area, and the beaches of Zanzibar, the government aimed to showcase tourism as both an economic driver and a tool of public diplomacy. This approach allowed Tanzania to highlight its commitment to wildlife conservation, cultural preservation, and sustainable tourism practices. The tour is also expected to create new avenues for investment opportunities in the hospitality and broader tourism sector.

### 1.2.2.6 The 2nd UN Tourism Regional Forum on Gastronomy Tourism for Africa

UN Tourism, the Basque Culinary Centre and the Government of the United Republic of Tanzania organized the 2nd UN Tourism Regional Forum on Gastronomy Tourism for Africa from 23-25 April 2025 in Arusha, Tanzania. The Forum was officially inaugurated by the Vice President of the United Republic of Tanzania Dr. Philip Isdor Mpango, and officiated by Dr. Taleb Rifai, the Secretary-General of the United Nations World Tourism Organization (UNWTO). This event brought together over 300 delegates from 35 countries, including policymakers, chefs, entrepreneurs, and experts, to explore the role of gastronomy tourism in promoting sustainable development and preserving cultural heritage.

The focus of the event was to unlock the continent's rich culinary assets as a catalyst for economic diversification, community empowerment, and cultural preservation. The forum featured high-level discussions on tourism value chains, education, job creation, and destination competitiveness. Through strategic dialogue and knowledge-sharing, the event aims to position African gastronomy at the core of the continent's tourism identity while reinforcing its global appeal. In addition to the thematic sessions, the forum featured live culinary demonstrations, case studies, and policy exchanges designed to deepen stakeholder engagement, inspire new partnerships and culinary skills.


*Official opening of the 2nd UN Tourism Regional Forum on Gastronomy Tourism for Africa*

### 1.2.2.7 New Heritage Museum at the Ngorongoro Conservation

On 16th October 2025, the Vice President of the United Republic of Tanzania, Dr. Philip Isdor Mpango, officially inaugurated the Ngorongoro-Lengai Geological Heritage Museum (Urithi Geo Museum) in Karatu, Arusha Region. The project was handed over to the Government of Tanzania by the Government of the People's Republic of China. This modern museum marks a significant milestone in promoting Tanzania's historical and natural heritage globally, while supporting local livelihoods through conservation initiatives and sustainable tourism. The Ngorongoro–Lengai Geopark Heritage Museum serves as a living classroom and cultural hub, integrating geological science, conservation, and community heritage to advance sustainable tourism and position Tanzania as a leader in geotourism and heritage education. By attracting international scholars, domestic learners, and niche travelers, the museum is poised to transform Tanzania's tourism landscape. It also highlights the traditions and lifestyles of local communities—including the Hadzabe, Iraqw, Datoga, and Maasai—through interactive exhibits such as identifying animal sounds and highlighting Tanzania's wildlife.

*Inauguration of the Ngorongoro-Lengai Geological Heritage Museum by the Vice President of the United Republic of Tanzania, Dr. Philip Isdor Mpango*

### 1.2.2.8 Zanzibar hosts major African Aviation Summit (AviaDev Africa)

AviaDev Africa is among the major aviation development conferences focusing on the African continent. It brings together airlines, airports, tourism Authorities, governments, and industry stakeholders to discuss air connectivity, route development, and investment opportunities across Africa. The event, hosted by the Zanzibar Airports Authority (ZAA) and Zanzibar Commission for Tourism (ZCT) aimed at promoting aviation and tourism growth across

Africa, with a specific focus in Tanzania. The AviaDev Africa 2025 attracted over 530 delegates, representing 48 countries, 46 airlines, and more than 10 tourism boards from Africa, making it one of the largest aviation and tourism development gatherings ever hosted in Zanzibar. The conference featured keynote speeches, panel discussions, and workshops covering topics such as route development, airport innovations, and sustainable aviation practices. In addition to networking opportunities, participants can enjoy Zanzibar's rich cultural and natural heritage. AviaDev Africa 2025 in Zanzibar was officially launched on June 2025 by His Excellency Dr. Hussein Ali Mwinyi, the President of Zanzibar and Chairman of Revolutionary Council.

#### 1.2.2.9 RwandAir launches weekly flight to Zanzibar

RwandAir introduced weekly flights between Kigali and Zanzibar, enhancing regional connectivity and supporting tourism growth. The new route opens direct access to one of Tanzania's premier destinations, while reinforcing Rwanda's role as a hub for intra-African travel. This expansion reflects rising demand in East Africa's aviation sector and is expected to boost visitor arrivals, trade, and cultural exchange across the region. RwandAir inaugurated its Zanzibar flights on 1st December 2025, with a ceremony at Abeid Amani Karume International Airport (AAKIA) to welcome the first flight from Kigali.


*Inauguration ceremony at Abeid Amani Karume International Airport*

# Chapter 2: Results of the Visitors' Exit Survey

## 2.1 Introduction

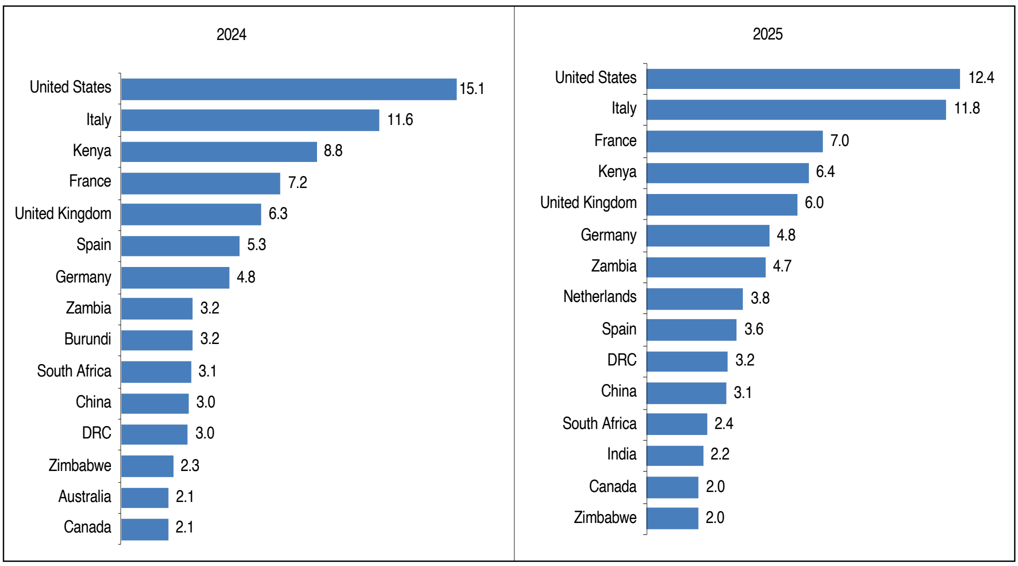
This chapter highlights key findings of the International Visitors' Exit Survey conducted during tourists' high peak season in August 2025. The survey covered eight exit points using a structured questionnaire to obtain information about visitors' demographics as well as travel experience and expenditure. It also highlights areas that need improvements to enhance visitors' satisfaction.

## 2.2 Source Markets

The survey findings indicate that traditional source markets continued to dominate[3]. The top 15 source markets accounted for over 75 percent of the total visitors with the United States of America and Italy taking the lead. Sources in the Top 15 list remained broadly the same as 2024, save for Australia and Burundi that have been replaced by the Netherlands and India. The results exhibit a more diversified source markets, owing to the enhanced promotional efforts (Chart 2.1).

**Chart 2.1: Top 15 Source Markets for the URT**

Percent



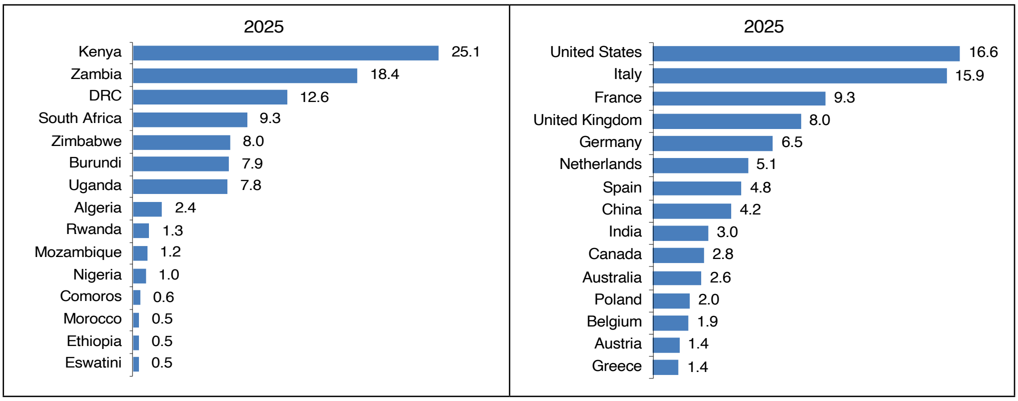

3 Traditional source markets refer to countries or regions that have historically been the main sources of tourists for a destination, based on established travel patterns, cultural and economic ties.

Long-haul visitors continue to be dominated by the same countries—the United States of America, Italy, France and the United Kingdom. Kenya, Zambia and the Democratic Republic of Congo continue to lead in African source markets (Chart 2.2).

### Chart 2.2: Top 15 Source Markets for URT by Regions

**African Source Markets** **Other Long-haul Destinations**

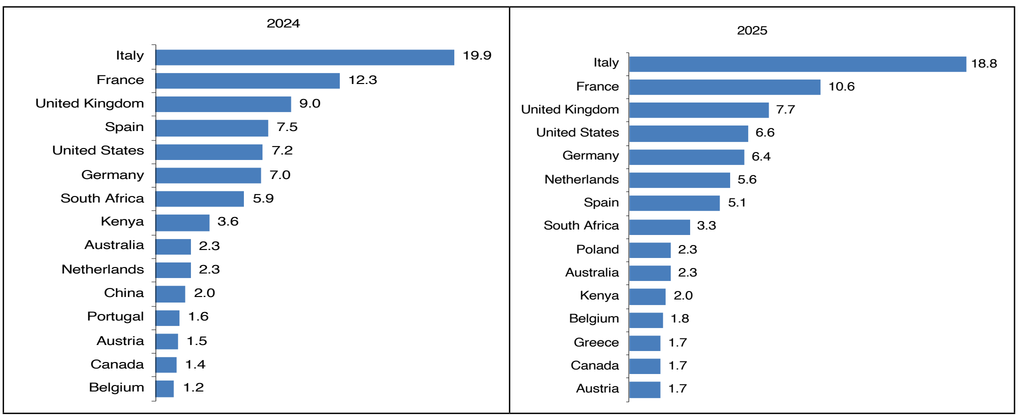
Percent




In Zanzibar, the top 15 source markets accounted for about 77 percent of the total visitors, with Italy continuing to maintain its first position as a primary source market for Zanzibar. Other important source markets were France and the United Kingdom (Chart 2.3).

### Chart 2.3: Top 15 Source Markets for Zanzibar

Percent

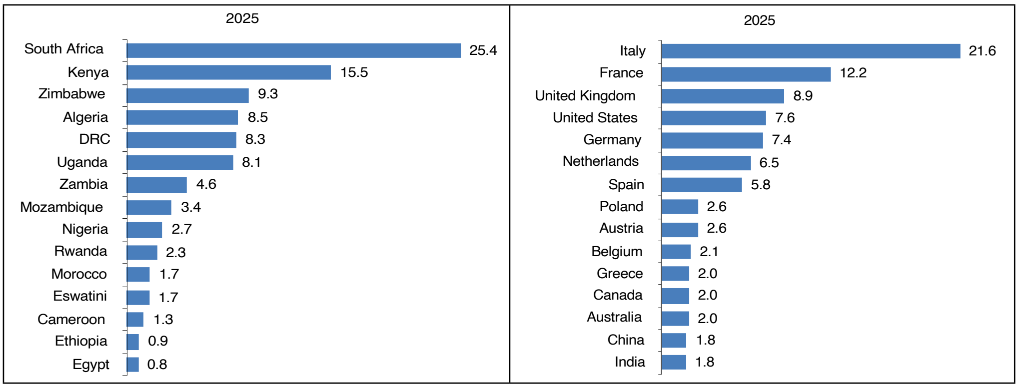



In Zanzibar, most visitors from African countries came from South Africa and Kenya, while from other regions Italy and France dominated (Chart 2.4).

**Chart 2.4: Top 15 Source Market for Zanzibar by Regions**

**African Source Markets** **Other Long-haul Destinations**

Percent

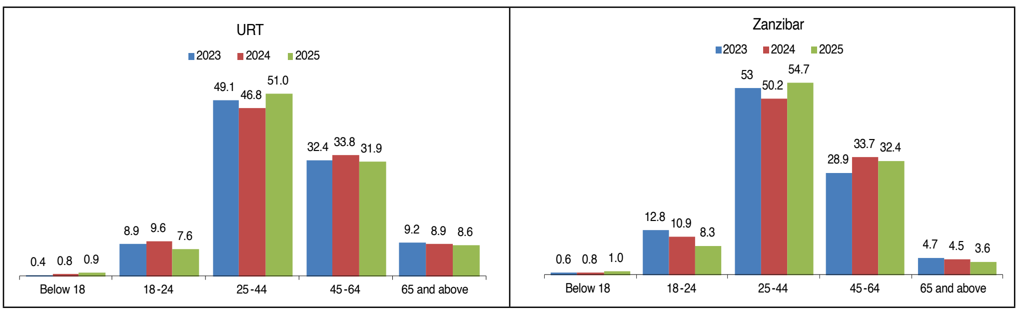



## 2.3 Age Group

Visitors to Tanzania are mainly adults in their prime travel years. In 2025, the 25–44 age group dominated, accounting for about half of all visitors, followed by those aged 45–64 at around one-third (Chart 2.5). Younger visitors (below 24) form a small share, while visitors aged 65 and above are more prominent in URT than in Zanzibar. Overall, the tourism sector is largely driven by economically active age groups.

**Chart 2.5: Distribution of Visitors by Age Group**

Percent




Across almost all the top 15 source markets, visitors concentrated in the 25–44 age group—exceeding 60 percent for markets such as Italy, the Democratic Republic of Congo, China, Burundi, and Uganda, followed by the 45–64 age group. Senior citizens (visitors aged 65 and above) are most notable from the United States of America and India, while regional African markets are more skewed toward younger and mid-career travelers (Table 2.1).

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

Percent

| Country of residence | Age group | | | | | |
|---|---|---|---|---|---|---|
| | Below 18 | 18-24 | 25-44 | 45-64 | 65 and above | Total |
| United States | 0.5 | 5.3 | 29.6 | 30.8 | 33.9 | 100 |
| Italy | 0.6 | 6.9 | 63.8 | 26.4 | 2.3 | 100 |
| Zambia | 0.2 | 1.8 | 66.5 | 29.9 | 1.5 | 100 |
| France | 2.8 | 6.0 | 52.6 | 36.0 | 2.6 | 100 |
| United Kingdom | 0.6 | 12.3 | 43.2 | 37.4 | 6.5 | 100 |
| Kenya | 2.5 | 12.1 | 51.3 | 30.5 | 3.6 | 100 |
| Germany | 1.9 | 15.3 | 37.8 | 40.1 | 5.0 | 100 |
| Spain | 1.6 | 8.6 | 55.2 | 33.0 | 1.6 | 100 |
| DRC | 0.2 | 4.1 | 67.6 | 26.7 | 1.4 | 100 |
| Netherlands | 1.2 | 8.4 | 37.1 | 51.2 | 2.0 | 100 |
| China | 2.5 | 6.7 | 65.0 | 17.9 | 8.0 | 100 |
| South Africa | 0.2 | 1.6 | 48.7 | 45.0 | 4.4 | 100 |
| Burundi | 0.5 | 9.1 | 63.7 | 24.7 | 2.0 | 100 |
| India | 0.0 | 8.6 | 43.8 | 35.5 | 12.1 | 100 |
| Uganda | 0.3 | 7.2 | 61.9 | 28.7 | 1.9 | 100 |

Likewise, in Zanzibar, visitors aged 25–44 years dominated across most markets—especially Italy, Australia, and Spain—while those aged 45–64 years form a strong secondary segment. The share of visitors aged 65 and above remains modest overall but is relatively higher among travelers from the United States of America, Australia, and Canada. Children and youth account for a negligible proportion, underscoring Zanzibar's appeal mainly to mature, economically active visitors (Table 2.2).

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

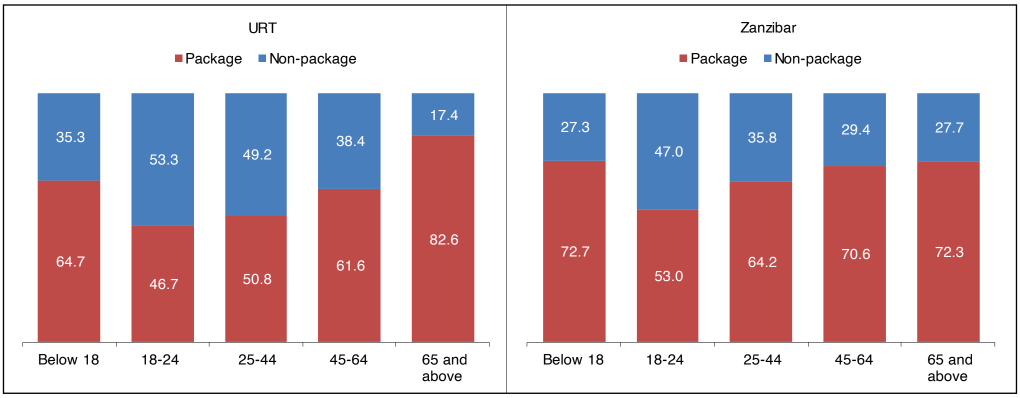
Percent

| Country of residence | Age group | | | | | |
|---|---|---|---|---|---|---|
| | Below 18 | 18-24 | 25-44 | 45-64 | 65 and above | Total |
| Italy | 0.3 | 6.2 | 69.3 | 23.3 | 0.9 | 100 |
| France | 3.6 | 5.6 | 56.0 | 33.5 | 1.5 | 100 |
| United Kingdom | 0.9 | 12.8 | 43.7 | 37.1 | 5.5 | 100 |
| United States | 0.4 | 8.3 | 37.3 | 38.6 | 15.3 | 100 |
| Germany | 2.4 | 12.2 | 40.1 | 42.5 | 2.7 | 100 |
| Spain | 0.7 | 8.4 | 57.1 | 32.3 | 1.5 | 100 |
| Netherlands | 1.5 | 7.9 | 37.2 | 51.9 | 1.5 | 100 |
| South Africa | 0.3 | 1.0 | 51.1 | 43.0 | 4.6 | 100 |
| Australia | 0.0 | 5.5 | 61.8 | 22.1 | 10.6 | 100 |
| Kenya | 0.5 | 9.7 | 46.5 | 40.5 | 2.7 | 100 |
| Poland | 1.2 | 8.4 | 37.3 | 51.8 | 1.2 | 100 |
| Greece | 0.7 | 3.4 | 51.7 | 39.5 | 4.8 | 100 |
| Austria | 0.7 | 11.3 | 49.6 | 36.9 | 1.4 | 100 |
| Canada | 0.7 | 8.1 | 55.1 | 28.7 | 7.4 | 100 |
| Belgium | 3.1 | 5.4 | 45.7 | 45.0 | 0.8 | 100 |

Different age groups in both URT and Zanzibar exhibited a varying choice in travel arrangement (Chart 2.6). In URT, all age groups preferred the package tour arrangement, with the exception of the age group of 18–24 years. However, the package tour have been more prominent in the senior citizens group (65 years and above), reflecting their risk averse nature, as they need to pre-arrange their travels before reaching destination to avoid uncertainties and unforeseen challenges. The 25–44 age group is almost evenly split between the package and non-package tour arrangements. A similar but stronger pattern is observed in Zanzibar, where the package tour dominates across all age groups, especially among senior citizens (65 years and above) and visitors aged 45–64 years.

**Chart 2.6: Age Group by Tour Arrangement**

Percent




Gender distribution varies by purpose of visit in both URT and Zanzibar. In URT, males dominate in business and meetings, while females are more prominent in leisure, scientific, and volunteering trips (Chart 2.7). In Zanzibar, females form the majority across most purposes, particularly in volunteering, scientific, and holiday visits, whereas males remain dominant mainly in business and meetings-related travel (Chart 2.8).

**Chart 2.7: Gender by Purpose of Visit, URT**

Percent

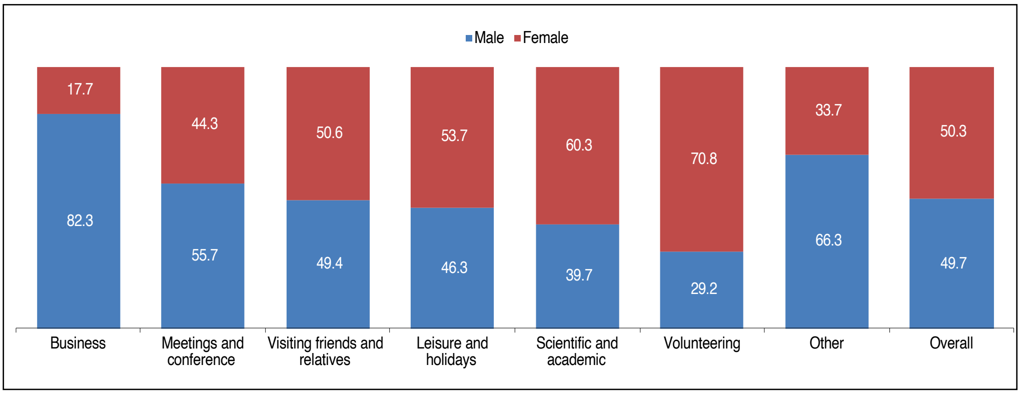
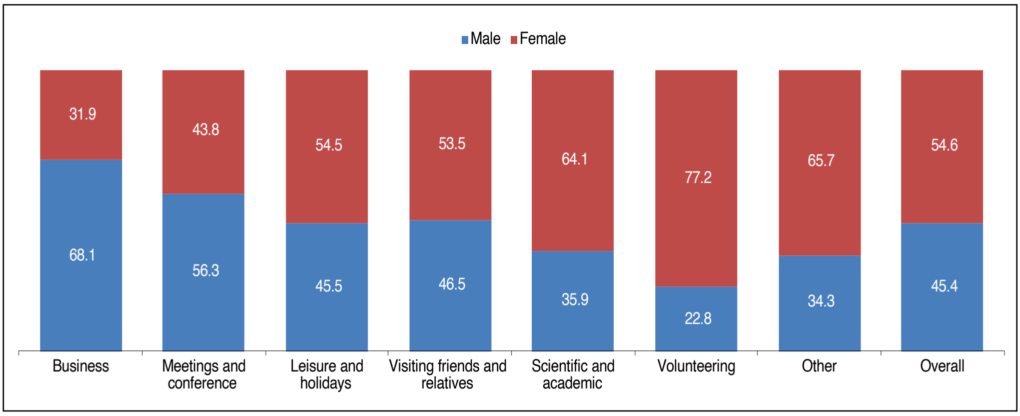



**Chart 2.8: Gender by Purpose of Visit, Zanzibar**

Percent

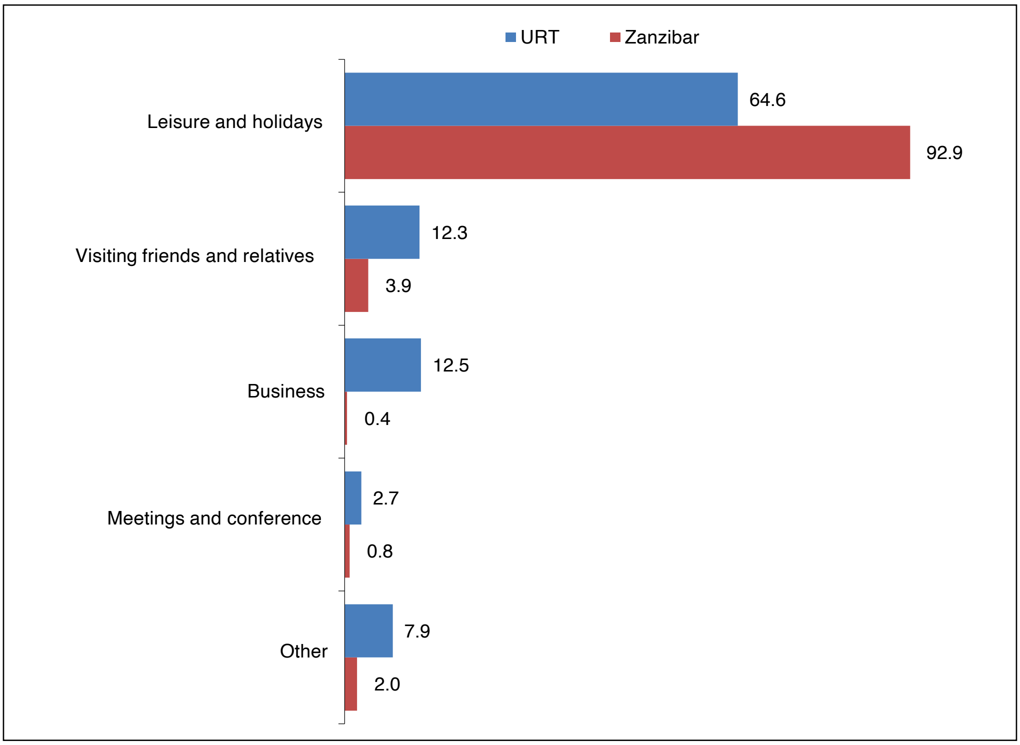



## 2.4 Purpose of Visit

In 2025, the URT continued to solidify its position as a premier leisure destination. Arrivals for leisure and holidays reached 17,430, representing 64.6 percent of all the total visitors. The trend was even more pronounced in Zanzibar, where leisure travellers accounted for 92.9 percent of all international arrivals that visited the Spice Island (Chart 2.9).

**Chart 2.9: Purpose of Visit, URT and Zanzibar**

Percent




These results align with historical data, underscoring a sustained global interest in URT's abundant wildlife and its rich marine and aquatic ecosystems. Under the leisure and holidays purpose, visitors from the United States of America, Italy, and France dominated. Those who came to visit friends and relatives were mostly from Kenya and Burundi. Meanwhile, visitors from Zambia and the Democratic Republic of Congo were primarily motivated by business purposes, reinforcing the country's strategic role as a vital transport and logistics hub for its landlocked neighbours (Table 2.3).

### Table 2.3: Visitors from top 15 source markets by purpose of visit for URT

Percent

| Country of residence | Leisure and holidays | Volunteering | Scientific and academic | Meetings and conference | Visiting friends and relatives | Business | Other | Total |
|---|---|---|---|---|---|---|---|---|
| | Purpose of Visit | | | | | | | |
| United States | 17.3 | 13.1 | 4.0 | 12.3 | 7.2 | 0.8 | 1.7 | 14.0 |
| Italy | 12.2 | 15.6 | 0.4 | 0.5 | 1.3 | 0.1 | 0.9 | 9.3 |
| France | 9.5 | 8.8 | 0.6 | 2.4 | 1.2 | 0.1 | 0.4 | 7.2 |
| Kenya | 1.8 | 0.6 | 81.1 | 15.6 | 27.4 | 2.7 | 11.0 | 7.0 |
| United Kingdom | 6.5 | 17.5 | 0.8 | 3.1 | 7.4 | 0.5 | 0.0 | 5.8 |
| Zambia | 0.4 | 0.0 | 0.2 | 6.7 | 1.5 | 50.3 | 13.7 | 5.4 |
| Germany | 5.9 | 3.1 | 0.2 | 0.5 | 2.8 | 0.2 | 6.1 | 4.8 |
| Netherlands | 5.5 | 1.3 | 0.4 | 1.7 | 1.4 | 0.1 | 0.2 | 4.2 |
| DRC | 1.6 | 0.0 | 0.4 | 1.7 | 8.6 | 14.1 | 15.6 | 3.7 |
| China | 4.3 | 1.3 | 0.8 | 9.4 | 1.3 | 0.9 | 0.6 | 3.6 |
| Spain | 4.7 | 1.3 | 0.2 | 0.5 | 0.4 | 0.0 | 1.3 | 3.6 |
| India | 2.5 | 0.0 | 0.4 | 3.1 | 3.6 | 2.3 | 0.2 | 2.5 |
| Burundi | 0.5 | 0.0 | 0.4 | 2.4 | 11.3 | 3.7 | 19.4 | 2.4 |
| Canada | 2.5 | 1.3 | 0.2 | 0.2 | 4.2 | 0.0 | 0.0 | 2.3 |
| Australia | 2.6 | 1.9 | 0.0 | 0.2 | 0.7 | 0.2 | 0.6 | 2.0 |
| Other | 22.2 | 34.4 | 9.8 | 39.7 | 19.7 | 23.9 | 28.5 | 22.4 |
| Grand total | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |

On the Spice Island of Zanzibar, visitors coming for leisure and holidays were mainly from Italy, France and the United Kingdom. Visitors from the United Kingdom and Kenya were prominent in visiting friends and relatives (Table 2.4).

### Table 2.4: Visitors from top 15 source markets by purpose of visit for Zanzibar

Percent

| Country of residence | Leisure and holidays | Volunteering | Scientific and academic | Meetings and conference | Visiting friends and relatives | Business | Other | Total |
|---|---|---|---|---|---|---|---|---|
| | Purpose of Visit | | | | | | | |
| Italy | 19.8 | 6.5 | 0.0 | 0.0 | 6.4 | 0.0 | 22.7 | 18.8 |
| France | 11.0 | 13.0 | 2.9 | 9.4 | 5.5 | 2.1 | 0.0 | 10.6 |
| United Kingdom | 7.2 | 28.3 | 2.0 | 2.1 | 19.4 | 2.1 | 0.0 | 7.7 |
| United States | 6.5 | 10.9 | 9.8 | 13.5 | 7.9 | 0.0 | 0.0 | 6.6 |
| Germany | 6.6 | 4.3 | 1.0 | 1.0 | 4.8 | 4.3 | 0.0 | 6.4 |
| Netherlands | 5.9 | 2.2 | 2.9 | 0.0 | 1.5 | 0.0 | 2.3 | 5.6 |
| Spain | 5.3 | 0.0 | 2.9 | 1.0 | 1.1 | 0.0 | 15.9 | 5.1 |
| South Africa | 3.3 | 0.0 | 11.8 | 4.2 | 2.0 | 6.4 | 0.0 | 3.3 |
| Australia | 2.4 | 2.2 | 0.0 | 0.0 | 2.4 | 0.0 | 0.0 | 2.3 |
| Poland | 2.4 | 0.0 | 0.0 | 0.0 | 1.5 | 2.1 | 0.0 | 2.3 |
| Kenya | 1.6 | 1.1 | 2.0 | 5.2 | 12.6 | 4.3 | 2.3 | 2.0 |
| Belgium | 1.9 | 0.0 | 1.0 | 0.0 | 0.9 | 0.0 | 4.5 | 1.8 |
| Canada | 1.6 | 1.1 | 0.0 | 1.0 | 5.7 | 0.0 | 0.0 | 1.7 |
| Greece | 1.9 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 1.7 |
| Austria | 1.8 | 3.3 | 0.0 | 1.0 | 0.0 | 0.0 | 0.0 | 1.7 |
| Other | 20.8 | 27.2 | 63.7 | 61.5 | 28.2 | 78.7 | 52.3 | 22.2 |
| Grand total | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |

## 2.5 Travel Arrangement

### 2.5.1 Travel Arrangement in URT

In URT, the preference for the package tour arrangements reached a new high in the post-pandemic era, particularly in 2024 and 2025. The share of visitors travelling under the package tour arrangement rose to 58.8 percent, up from 56.3 percent in 2024 (Chart 2.10). The demand for the package tour arrangement was particularly high among long-haul travellers from Israel, Poland, and the United States of America (Chart 2.11).

**Chart 2.10: Visitors' Trend by Tour Arrangement, URT**

Percent

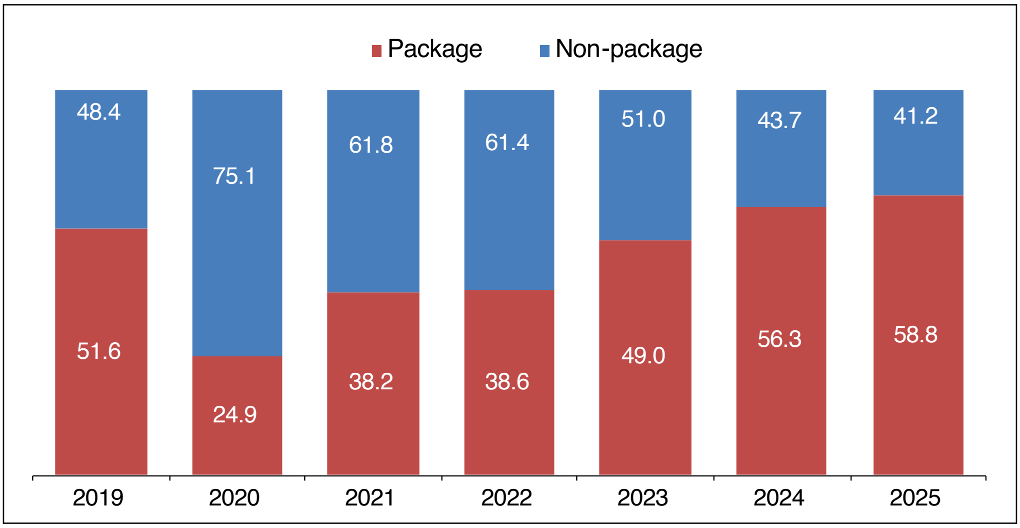
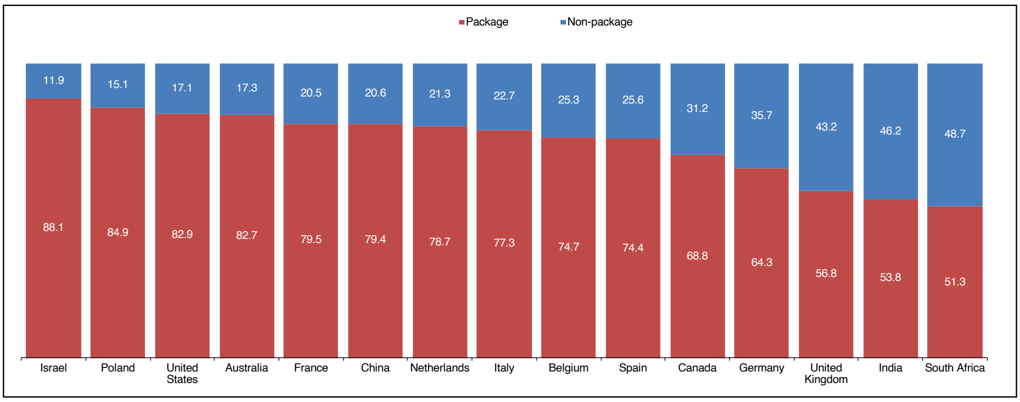



**Chart 2.11: Visitors from Top 15 Source Markets by Tour Arrangement, URT**

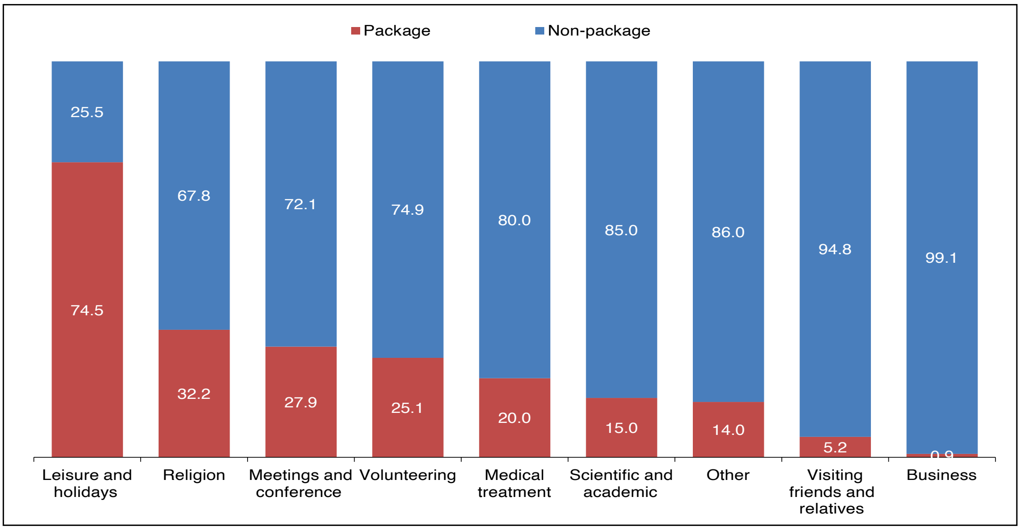
Percent



As in the previous surveys, leisure and holiday visitors predominantly preferred the package tour arrangement compared to other purposes. Conversely, visitors arriving for other purposes maintained a strong preference for the non-package tour arrangement (Chart 2.12).

**Chart 2.12: Travel Arrangement by Purpose of Visit, URT**

Percent

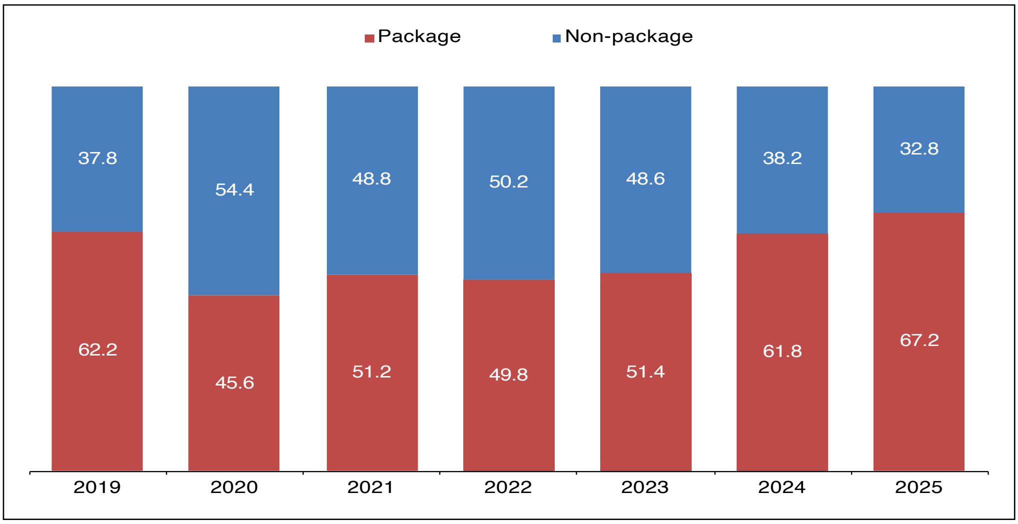



## 2.5.2 Travel Arrangement in Zanzibar

In Zanzibar, the shifts towards pre-arranged travel strengthened in 2025. The proportion of visitors opting for the package tour arrangement increased from 61.8 percent in the preceding year to 67.2 percent in 2025 (Chart 2.13). Mostly, long-haul visitors who came from the Netherlands, Italy and France chose the structure of the package deals to enjoy their holidays. However, visitors from neighbouring countries dominated by the Democratic Republic of Congo, Kenya and Uganda continued to prefer the flexibility of the non-package tour arrangement (Chart 2.14).

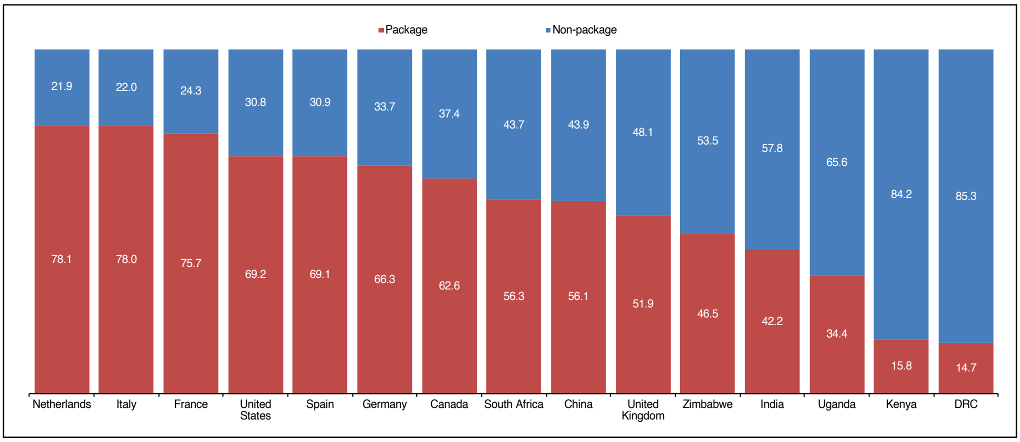
## Chart 2.13: Visitors' Trend by Tour Arrangement, Zanzibar

Percent




## Chart 2.14: Visitors from Top 15 Source Markets by Tour Arrangement, Zanzibar

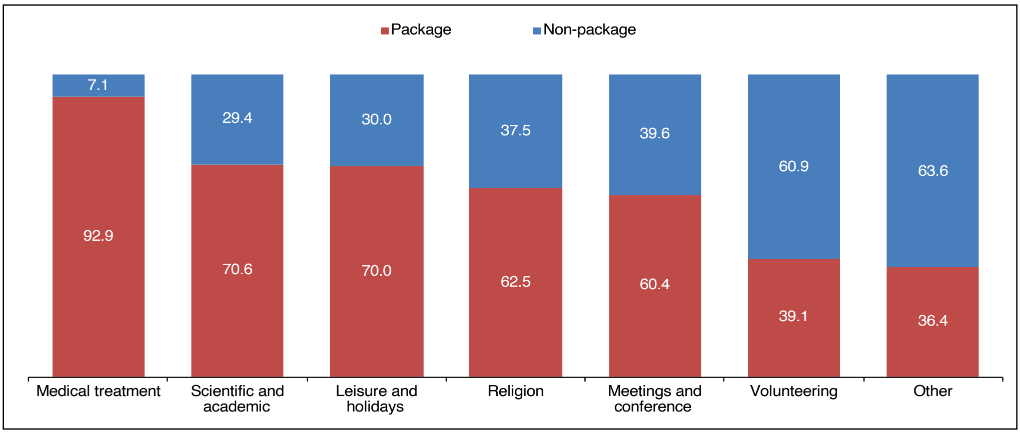
Percent




Volunteering visitors ranked the highest in their preference for the non-package tour arrangement, reflecting the need for more flexibility and integration into the local communities (Chart 2.15).

**Chart 2.15: Travel Arrangement by Purpose of Visit, Zanzibar**

Percent



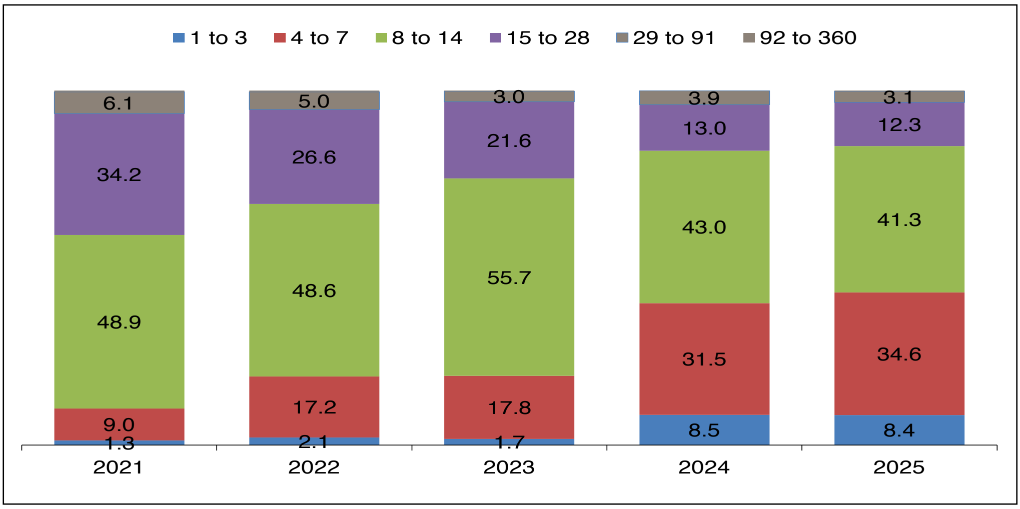

## 2.6 Nights Spent and Length of Stay

### 2.6.1 Nights Spent

The 2025 survey results show that about 41 percent of the visitors spent 8 to 14 nights, followed by visitors who stayed 4 to 7 nights. A similar pattern has been observed over the previous surveys (Chart 2.16). The majority of the visitors who stayed for 8 to 14 nights in URT were holiday makers as well as those who came for meetings. Meanwhile, visitors who came to visit friends and relatives as well as business visitors mainly stayed for 4 to 7 nights (Table 2.5).

**Chart 2.16: Visitors Proportion by Nights Spent, URT**

Percent



## Table 2.5: Distribution of Visitors by Nights Spent and Purpose of Visit, URT

Percent

| Night spent | Purpose of visit | | | | | | | | Total |
|---|---|---|---|---|---|---|---|---|---|
| | Business | Leisure and holidays | Medical treatment | Meetings and conference | Scientific and academic | Visiting friends and relatives | Volunteering | Other | |
| 1 to 3 | 15.9 | 9.7 | 7.6 | 8.9 | 34.8 | 12.2 | 8.3 | 11.9 | 11.0 |
| 4 to 7 | 36.5 | 34.2 | 37.9 | 27.2 | 29.0 | 36.7 | 35.1 | 37.4 | 34.5 |
| 8 to 14 | 31.7 | 39.2 | 37.9 | 46.0 | 26.7 | 34.4 | 35.1 | 37.1 | 38.0 |
| 15 to 28 | 10.7 | 12.2 | 13.6 | 10.7 | 8.9 | 10.5 | 12.5 | 9.6 | 11.8 |
| 29 to 91 | 4.8 | 4.4 | 3.0 | 7.3 | 0.6 | 5.8 | 8.9 | 3.7 | 4.5 |
| 92 to 360 | 0.4 | 0.2 | 0.0 | 0.0 | 0.0 | 0.5 | 0.0 | 0.3 | 0.3 |
| Total | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |

In Zanzibar, about 56 percent of visitors spent 8 to 14 nights, followed by those who spent 15 to 28 nights. A similar pattern has been observed in previous surveys (Chart 2.17).The majority of visitors who stayed for 8 to 14 nights were holiday makers; and those who came to visit friends and relatives, as well as scientific and academic visitors. Those who spent 4 to 7 nights came for business as well as meetings and conferences (Table 2.6).

## Chart 2.17: Visitors Proportion by Night Spent, Zanzibar

Percent

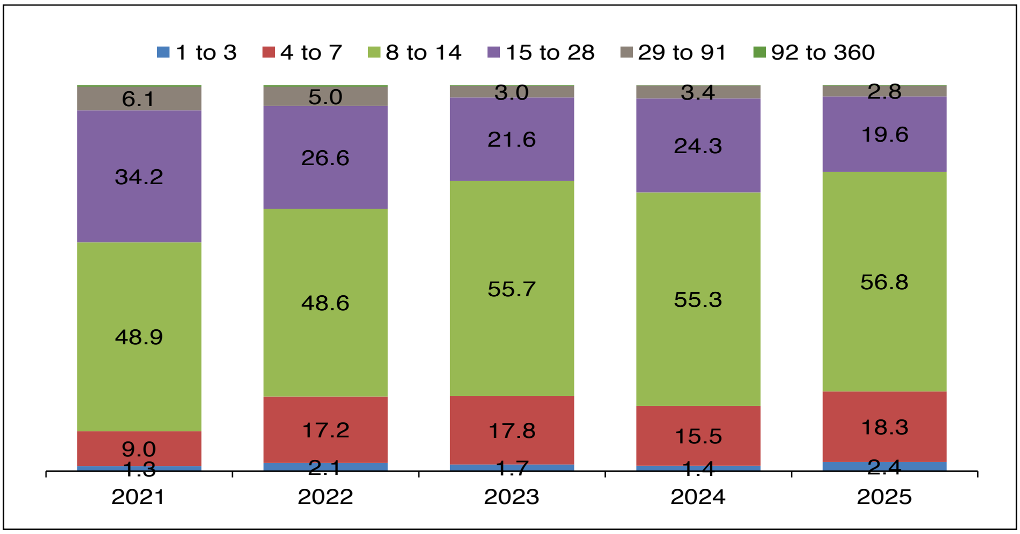


**Table 2.6: Distribution of Visitors by the Nights Spent and Purpose of Visit, Zanzibar**

Percent

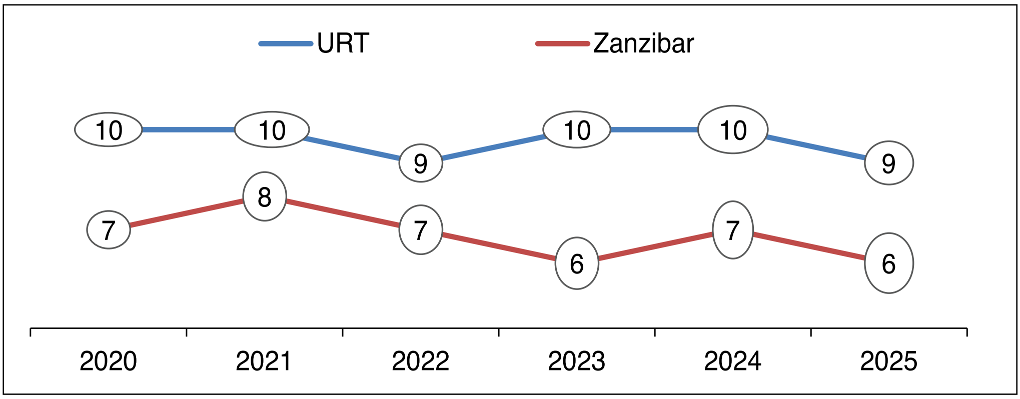
| Night spent | Leisure and holidays | Business | Visiting friends and relatives | Meetings and conference | Religion | Scientific and academic | Volunteering | Other | Total |
|---|---|---|---|---|---|---|---|---|---|
| | Purpose of Visit | | | | | | | | |
| 1 to 3 | 2.1 | 14.9 | 5.5 | 10.4 | 0.0 | 3.9 | 2.2 | 3.7 | 2.4 |
| 4 to 7 | 17.5 | 34.0 | 28.2 | 47.9 | 37.5 | 13.6 | 20.7 | 40.7 | 18.3 |
| 8 to 14 | 58.2 | 23.4 | 35.7 | 34.4 | 0.0 | 70.9 | 44.6 | 0.0 | 56.8 |
| 15 to 28 | 20.0 | 17.0 | 19.4 | 7.3 | 62.5 | 3.9 | 7.6 | 3.7 | 19.6 |
| 29 to 91 | 2.1 | 6.4 | 10.8 | 0.0 | 0.0 | 2.9 | 25.0 | 51.9 | 2.8 |
| 92 to 360 | 0.1 | 4.3 | 0.4 | 0.0 | 0.0 | 4.9 | 0.0 | 0.0 | 0.1 |
| Total | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |

## 2.6.2 Average Length of Stay

In URT, the overall average length of stay was 9 nights, a decrease in one night compared to the previous survey. It is worth noting that, the average length of stay has been oscillating between 9 and 10 nights over the years. For Zanzibar, the overall average length of stay was 6 nights, indicating a decrease of one night from 2024 survey results (Chart 2.18).

**Chart 2.18: Average Length of Stay, URT and Zanzibar, 2019 – 2025**

Nights




In URT, visitors from China stayed longer, with an overall average of 16 nights, followed by those from the Netherlands, Canada and DRC. Under the leisure and holiday purpose, visitors who stayed the longest were mostly from long-haul source markets (Table 2.7). In Zanzibar, visitors from Austria stayed the longest with an average of 12 nights, followed by visitors from France, the Netherlands and Poland, with an average of 8 nights (Table 2.8).

### Table 2.7: Average Length of Stay of Top 15 Source Market by Purpose, URT

| Country of residence | Purpose of visit | | | | |
|---|---|---|---|---|---|
| | Leisure and holidays | Business | Visiting friends and relatives | Other | Average |
| United States | 10 | 10 | 10 | 12 | 11 |
| Italy | 10 | 5 | 11 | 14 | 10 |
| France | 11 | 8 | 13 | 16 | 12 |
| Kenya | 5 | 6 | 8 | 13 | 8 |
| United Kingdom | 12 | 7 | 14 | 18 | 13 |
| Germany | 13 | 7 | 18 | 14 | 13 |
| Zambia | 6 | 11 | 9 | 6 | 8 |
| Netherlands | 15 | 8 | 15 | 20 | 14 |
| Spain | 10 | 6 | 18 | 19 | 13 |
| DRC | 14 | 9 | 9 | 23 | 14 |
| China | 7 | 9 | 9 | 39 | 16 |
| South Africa | 7 | 6 | 10 | 6 | 7 |
| India | 7 | 16 | 10 | 3 | 9 |
| Canada | 10 | 20 | 13 | - | 14 |
| Zimbabwe | 7 | 4 | 5 | 4 | 5 |
| Average | 10 | 9 | 11 | 15 | 11 |

### Table 2.8: Average Length of Stay of Top 15 Source Markets by Purpose, Zanzibar

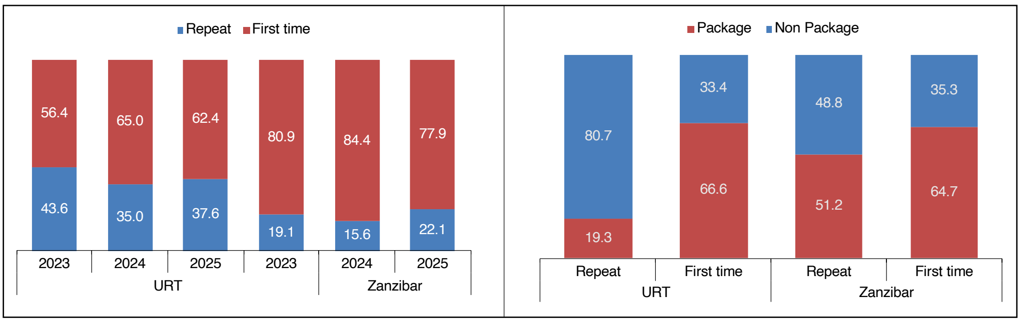
| Country of Residence | Purpose of visit | | | | |
|---|---|---|---|---|---|
| | Leisure and holidays | Business | Visiting friends and relatives | Other | Average |
| Italy | 7 | - | 7 | 6 | 7 |
| France | 7 | 2 | 8 | 13 | 8 |
| United Kingdom | 7 | 3 | 7 | 6 | 6 |
| United States | 5 | 5 | 6 | 8 | 6 |
| Germany | 7 | 10 | 8 | 8 | 8 |
| Netherlands | 7 | - | 7 | 10 | 8 |
| Spain | 6 | 1 | 10 | - | 6 |
| South Africa | 7 | 4 | 10 | 5 | 6 |
| Australia | 5 | - | 6 | 4 | 5 |
| Poland | 8 | 10 | 7 | - | 8 |
| Kenya | 4 | 5 | 5 | 2 | 4 |
| Belgium | 7 | - | 12 | 2 | 7 |
| Canada | 5 | 9 | 5 | 5 | 6 |
| Greece | 6 | - | - | - | 6 |
| Austria | 7 | 6 | - | 22 | 12 |
| Average | 6 | 6 | 8 | 7 | 7 |

## 2.7 First-time and Repeat Visits

In 2025, the survey findings show that both URT and Zanzibar had a higher proportion of first-time visitors than repeat visitors (Chart 2.19). However, Zanzibar had more first-time visitors, accounting for over 78 percent of the total visitors. This trend has been observed since 2023. URT, in contrast, maintained a more balanced mix of first-time and repeat visitors. Most first-time visitors in both URT and Zanzibar preferred the package tour arrangement, as this arrangement is considered simple, convenient and reliable. Repeat visitors, on the other hand, tended to prefer the non-package tour arrangement due to flexibility, familiarity with the destination, allowing them to choose options that better match their needs, preferences, and budget.

**Chart 2.19: First-time and Repeat Visitors, URT and Zanzibar**

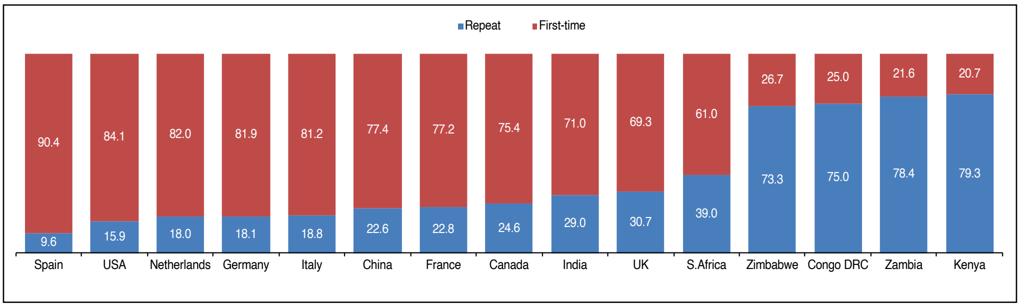
Percent




A large proportion of first-time visitors originated from long-haul markets such as Spain, the United States of America, the Netherlands, Germany, and Italy, reflecting growing international interest and effective destination promotion in distant markets. In contrast, repeat visitors mainly came from neighboring countries including Kenya, Zambia, the Democratic Republic of Congo, and Zimbabwe. This pattern is largely explained by geographical proximity, ease of cross-border movement, cultural and social ties, which provide convenience of short and frequent visits, encouraging visitors to return multiple times (Chart 2.20).

### Chart 2.20: First-time and Repeat Visitors by Top 15 Source Markets, URT

Percent




The results show that leisure and holidays was the main purpose of visit for both first-time and repeat visitors in URT and Zanzibar. Repeat visitors in URT displayed a more diversified travel purposes, including business, visiting friends and relatives, and meetings and conference. This could be attributed to its broader economic base, administrative functions, and cross-border trade activities. In Zanzibar, both first time and repeat visitors were mostly leisure-oriented, suggesting that the island is primarily recognized as a holiday destination (Table 2.9).

### Table 2.9: First-time Visitors and Repeat Visitors by Purpose of Visit, URT and Zanzibar

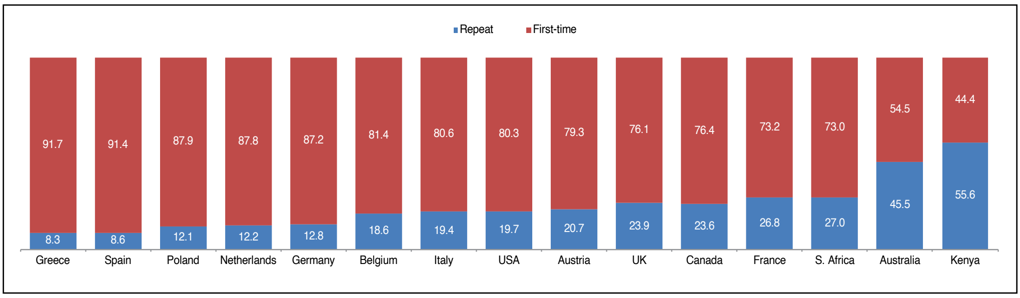
Percent

| Purposes of visit | URT | | Zanzibar | |
|---|---|---|---|---|
| | Repeat visitors | First-time visitors | Repeat visitors | First-time visitors |
| Leisure and Holidays | 33.1 | 86.1 | 80.0 | 94.6 |
| Visiting Friends and Relatives | 24.6 | 4.2 | 14.6 | 1.9 |
| Business | 30.5 | 4.2 | 2.1 | 0.5 |
| Meetings and Conference | 4.0 | 1.9 | 1.9 | 0.8 |
| Volunteering | 0.5 | 1.4 | 0.4 | 1.4 |
| Religion | 1.1 | 0.5 | 0.1 | 0.0 |
| Scientific and Academic | 0.6 | 0.6 | 0.3 | 0.6 |
| Other | 5.7 | 1.2 | 0.4 | 0.3 |
| Total | 100 | 100 | 100 | 100 |

The largest proportion of first-time visitors to Zanzibar came from Greece, Spain, Poland, the Netherlands, and Germany, while repeat visitors came mainly from Kenya and Australia (Chart 2.21).

**Chart 2.21: First-time and Repeat Visitors by Top 15 Source Markets, Zanzibar**

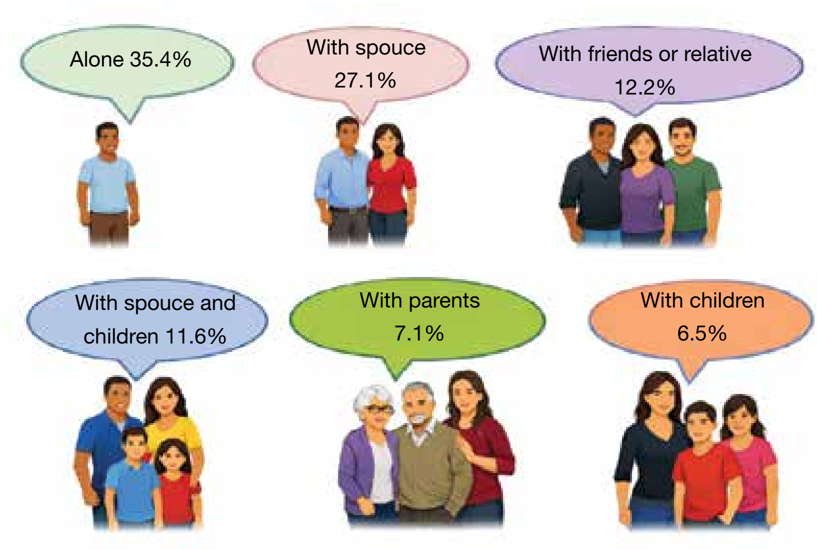
Percent




## 2.8 Travel Party

The distribution of travel parties in URT shows that, most visitors traveled alone, followed by those traveling with their spouses. Visitors traveling with friends or relatives; and with spouse and children also represent a notable share, while those traveling with children constitute the least (Chart 2.22).

**Chart 2.22: Visitors by Travel party, URT.**




The survey's findings pointed out changes in travel party composition for both URT and Zanzibar from 2022 to 2025. In URT, travelling alone and travelling with a spouse were the most common travel parties throughout the period, except in 2024. In Zanzibar, those travelling with a spouse consistently recorded the highest share. Meanwhile, the share of visitors travelling with friends or relatives declined significantly in 2025 in both regions. Generally, the results suggest growing importance of family-oriented travel, especially trips involving travelling with spouses.

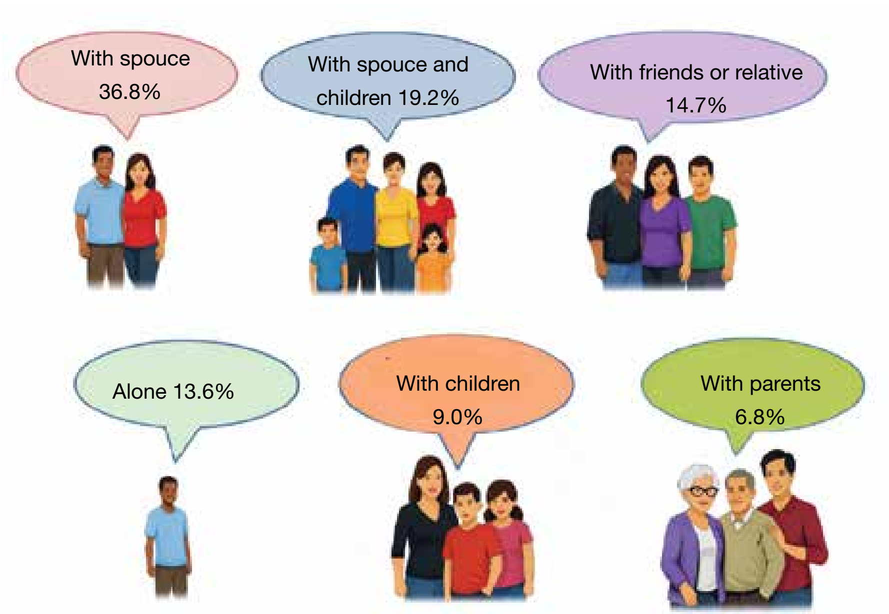
**Table 2.10: Trend of Visitors by Travel Party in URT and Zanzibar.**

Percent

| Travel party | URT | | | Zanzibar | | |
|---|---|---|---|---|---|---|
| | 2023 | 2024 | 2025 | 2023 | 2024 | 2025 |
| With spouse | 26.4 | 24.3 | 27.1 | 36.2 | 29.5 | 36.8 |
| With other friends and relatives | 22.0 | 26.5 | 12.2 | 24.0 | 28.7 | 14.7 |
| Alone | 32.1 | 24.5 | 35.4 | 11.7 | 9.4 | 13.6 |
| With spouse and children | 13.4 | 18.8 | 11.6 | 20.8 | 26.6 | 19.2 |
| With children | 4.2 | 4.2 | 6.5 | 4.5 | 4.1 | 9.0 |
| With parents | 1.8 | 1.7 | 7.1 | 2.8 | 1.7 | 6.8 |
| Total | 100 | 100 | 100 | 100 | 100 | 100 |

In Zanzibar, the largest share of visitors traveled with their spouse, followed by those accompanied by their spouse and children. Traveling with friends or relatives also accounted for a considerable proportion, while those travelling with parents represented the smallest proportion (Chart 2.23).

**Chart 2.23: Visitors by Travel party, Zanzibar.**



In URT, visitors who travelled alone accounted for the largest share across all purposes of visit, except for leisure and holiday trips, where a higher proportion of visitors travelled with their spouses (Table 2.11). A similar pattern was observed in Zanzibar (Table 2.12).

**Table 2.11: Distribution of Travel Party and Purpose of Visit, URT**

Percent

| Purpose of visit | Alone | With children | With friends and relatives | With parents | With spouse and children | With spouse/partner | Total |
|---|---|---|---|---|---|---|---|
| Business | 80.4 | 0.8 | 10.2 | 4.3 | 0.2 | 4.1 | 100 |
| Leisure and holidays | 20.5 | 7.7 | 13.1 | 7.4 | 15.6 | 35.7 | 100 |
| Meetings and conference | 73.8 | 1.4 | 16.9 | 1.7 | 0.5 | 5.7 | 100 |
| Scientific and academic | 52.4 | 6.5 | 31.5 | 4.2 | 1.8 | 3.6 | 100 |
| Visiting friends and relatives | 63.3 | 7.5 | 6.4 | 10.2 | 4.5 | 8.1 | 100 |
| Volunteering | 59.0 | 1.6 | 21.3 | 6.1 | - | 11.9 | 100 |
| Other | 77.5 | 3.0 | 8.8 | 5.4 | 2.0 | 3.3 | 100 |

**Table 2.12: Distribution of Travel Party and Purpose of Visit, Zanzibar**

Percent

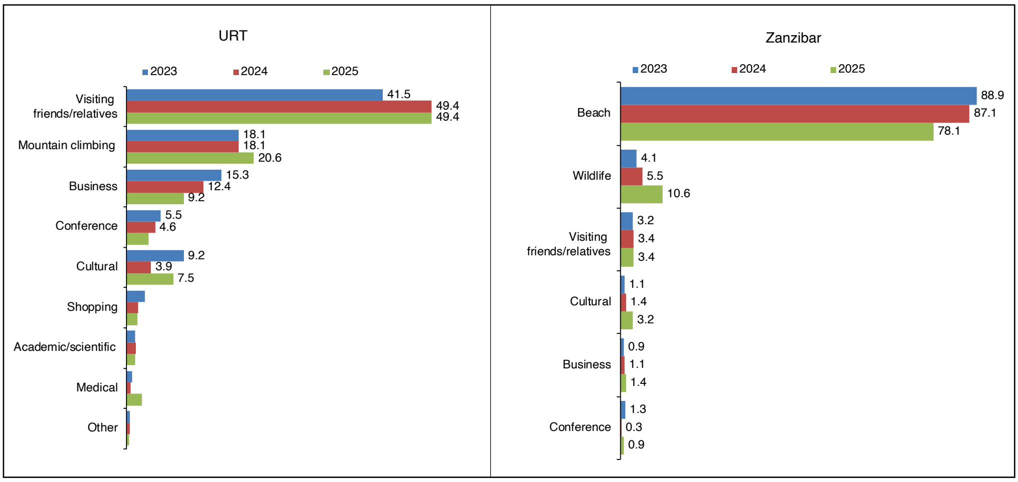
| Purpose of visit | Alone | With children | With friends and relatives | With parents | With spouse and children | With spouse/partner | Total |
|---|---|---|---|---|---|---|---|
| Leisure and holidays | 78.5 | - | 13.9 | - | - | 7.6 | 100 |
| Business | 50.0 | - | - | 50.0 | - | - | 100 |
| Meetings and conference | 58.5 | 4.7 | 30.2 | - | - | 6.6 | 100 |
| Scientific and academic | 42.6 | 11.5 | 24.6 | 6.6 | 4.9 | 9.8 | 100 |
| Visiting friends and relatives | 38.4 | 10.3 | 13.3 | 13.9 | 9.9 | 14.3 | 100 |
| Volunteering | 48.7 | 1.7 | 26.1 | 8.7 | - | 14.8 | 100 |
| Other | 40.0 | 20.0 | 20.0 | 10.0 | - | 10.0 | 100 |

## 2.9 Tourism Activity

In URT, game viewing (wildlife), beach, visiting friends and relatives and business remained the leading tourism activities with wildlife accounting for the largest share. In Zanzibar, beach tourism continued to dominate as the primary tourism activity (Chart 2.24).

**Chart 2.24: Main Tourism Activities**

Percent

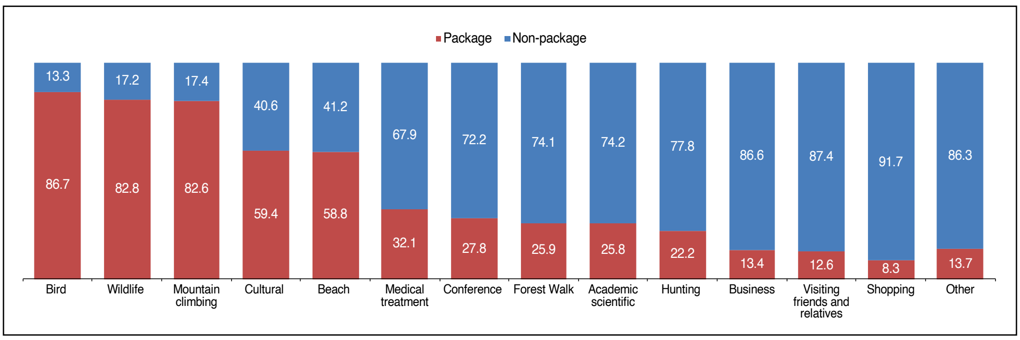



## 2.10 Tourism Activity by Travel Arrangement

The findings show that visitors engaging in wildlife viewing, birding, mountain climbing, cultural tourism, and beach activities generally preferred package tours to ensure coordinated logistics such as guides, permits, transport, and accommodation. In contrast, most of visitors traveling for business, shopping, or visiting friends and relatives preferred the non-package tour arrangement reflecting their need for flexibility and reliance on personal or institutional networks (Chart 2.25).

**Chart 2.25: Tourism Activity by Travel Arrangement**

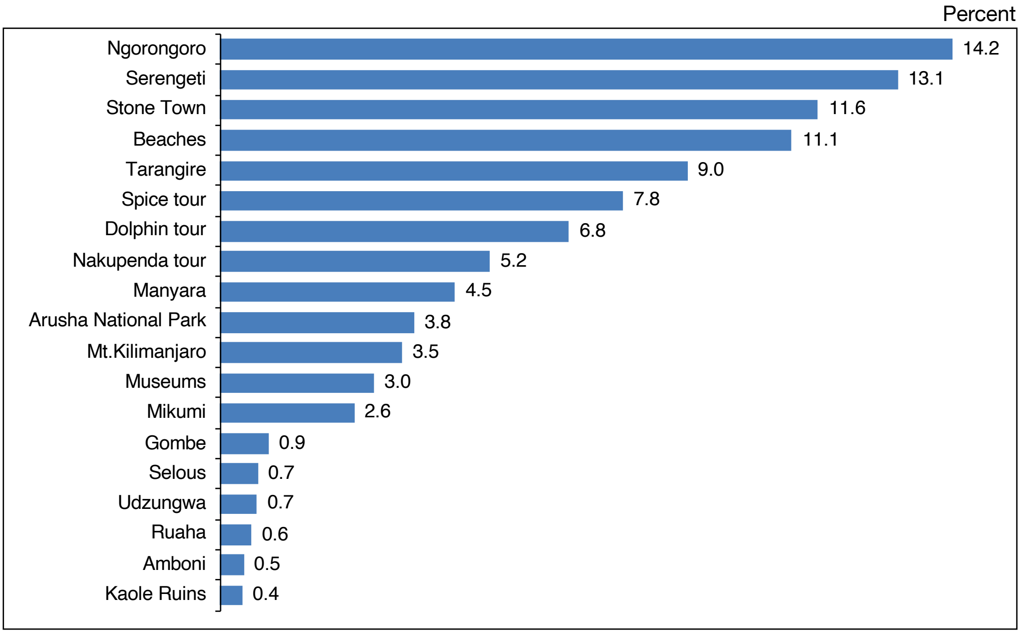
Percent



## 2.11 Most Visited Tourist Attractions

The leading tourist attractions in Tanzania continued to be Ngorongoro, Serengeti, beaches, Stone Town, and Tarangire, reaffirming their central role in the country's tourism landscape. However, in 2025, the findings indicate a positive diversification of visitors' movement from these leading attractions with their share declining to 58.9 percent from 62.6 percent in 2024. This reflects a growing interest in exploring a wider range of attractions across the country, alongside continued strong demand for Tanzania's iconic sites. The diversification underscores the country's rich and expanding tourism attractions, highlighting its capacity to offer diverse experiences.

**Chart 2.26: Most Visited Tourist Attractions**




The continued prominence of these leading attractions is further reinforced by key achievements directly linked to their global recognition and product enhancement, including:

i. Tanzania National Parks (TANAPA) received the European Quality Choice Diamond Award 2025 in recognition of excellence in tourism service delivery across national parks.

ii. Serengeti National Park was ranked the best wildlife park in Africa by Breaking Travel News in May 2025, surpassing other renowned parks on the continent, reaffirming its global prestige.

iii. Tanzania ranked fourth globally for natural beauty, highlighting the international appeal of its iconic landscapes, including Ngorongoro Crater, Serengeti plains, and Zanzibar's white sandy beaches.
iv. The official inauguration of the Ngorongoro-Lengai Geological Heritage Museum (Urithi Geo Museum) enhanced the tourism value by promoting geological heritage and enriching visitor experience.

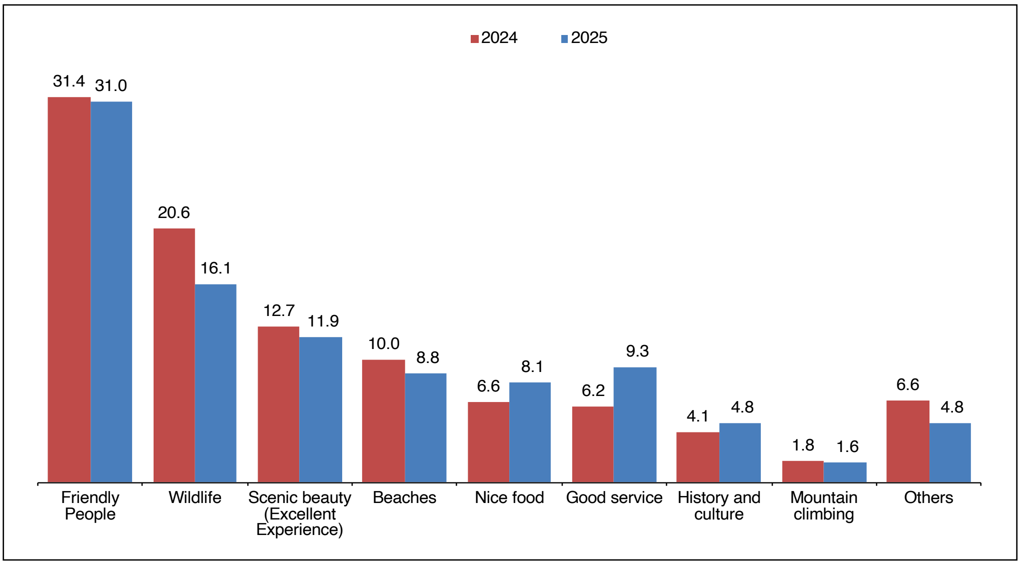
These achievements complement the strong visitor performance of the leading attractions and reinforce Tanzania's standing as a diverse and globally competitive tourism destination.

### 2.12 Visitors' Impression

In 2025, Tanzania's tourism sector saw remarkable curated developments that built on its longstanding strengths, particularly the renowned friendliness of the people. Enhanced hospitality training programs and community-led initiatives created even warmer welcomes, fostering deeper cultural exchanges, and encouraging more positive stories shared globally. Wildlife viewing and scenic beauty also advanced significantly, driven by strengthened anti-poaching efforts, upgraded national park facilities, and new eco-friendly viewing points. Pristine white sand beaches in Zanzibar and along the coast, benefited from sustainable management and cleanup campaigns, boosting impressions, while the promotion of diverse, natural local foods through farm-to-table experiences and culinary festivals elevated its prominence. These developments translated into tangible growth, with repeat visitors rising to 48 percent, up from the previous three-year average of 42 percent, as lasting positive impressions inspired return trips. Amplified promotion on social media and among networks might also have played a part in this agenda, with the visitors' observation that the internet social media are among the upcoming sources of information about Tanzania. Overall, these curated enhancements in hospitality, conservation, and cultural offerings positioned Tanzania for sustained tourism expansion, reinforcing its appeal as a welcoming, diverse, and unforgettable destination (Chart 2.27).

**Chart 2.27: Visitors' Impression**

Percent




## 2.13 Source of Information

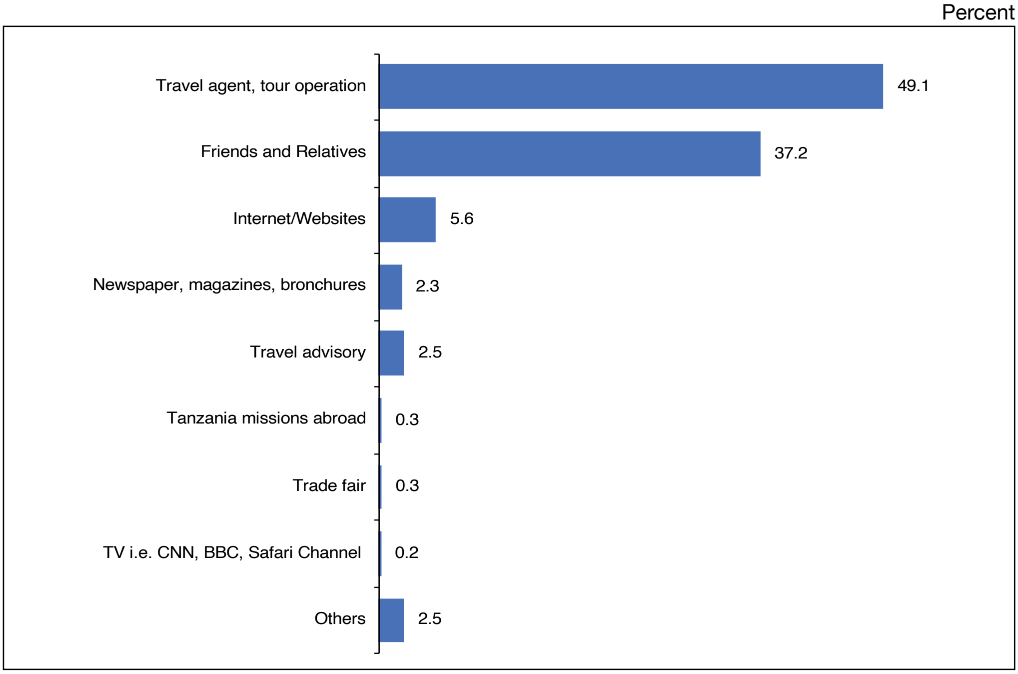
The trend in sources of information about Tanzania indicates that travel agents and tour operators have steadily grown and became the most important source, accounting for about half of respondents from 2024 to 2025. This suggests increased reliance on professional channels. In contrast, information from friends and relatives declined over time, although remained a significant source. Other sources, including the internet, magazines and travel advisories continued to demonstrate limited influence (Table 2.13).

**Table 2.13: Source of Information about Destination Tanzania**

Percent

| Source of Information | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|
| Travel agent, tour operator | 23.9 | 28.7 | 34.0 | 41.8 | 50.6 | 49.1 |
| Friends and relatives | 57.5 | 42.6 | 43.6 | 40.0 | 35.9 | 37.2 |
| Internet/Websites | 8.7 | 19.8 | 9.5 | 5.9 | 5.8 | 5.6 |
| Newspaper, magazines, brochures | 3.0 | 1.0 | 1.8 | 3.5 | 1.9 | 2.3 |
| Travel advisory | 2.3 | 1.4 | 2.0 | 2.1 | 1.2 | 2.5 |
| TV i.e. CNN, BBC, Safari Channel | 0.3 | 0.4 | 0.4 | 0.3 | 0.6 | 0.2 |
| Tanzania missions abroad | 0.3 | 0.3 | 0.6 | 0.7 | 0.5 | 0.3 |
| Trade fair | 1.2 | 0.6 | 0.5 | 0.4 | 0.3 | 0.3 |
| Others | 2.8 | 5.3 | 6.9 | 5.3 | 3.2 | 2.5 |
| Total | 100 | 100 | 100 | 100 | 100 | 100 |

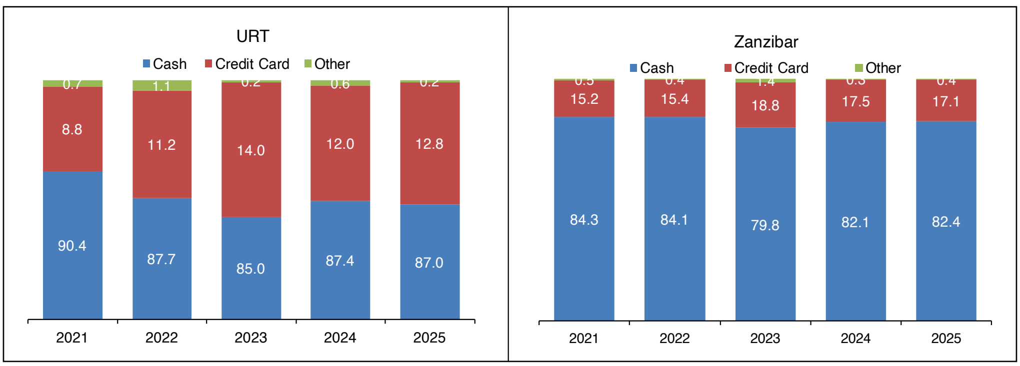
### Chart 2.28: Source of information about destination Tanzania




## 2.14 Mode of Payment

Cash remains the dominant mode of payment for visitors in both URT and Zanzibar, followed by credit/debit cards. However, the proportion of visitors who used other modes of payment such as bank transfers and mobile money remained small (Chart 2.29).

### Chart 2.29: Modes of payment



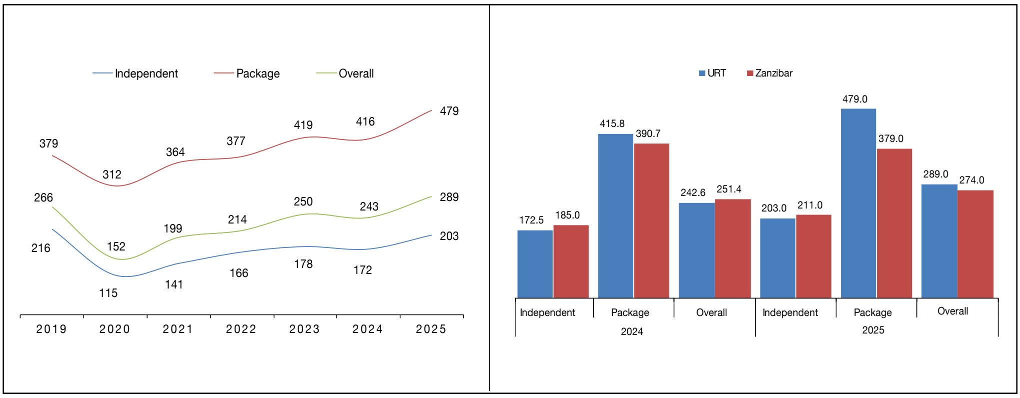
## 2.15 Average Expenditure

The overall average expenditure per person per night in 2025 increased by 19.1 percent to USD 289 compared to USD 243 in 2024. The average expenditure per person per night for visitors who traveled under the package tour arrangement increased to USD 479 in 2025 from USD 416 in 2024. Similarly, the average expenditure for visitors who came under the non-package tour arrangement was USD 203, up from USD 172 in 2024, but lower than USD 216 registered in 2019 pre-pandemic era (Chart 2.30).

In Zanzibar, the overall average expenditure increased by 9 percent to USD 274 from USD 251 in 2024. The average expenditure for visitors who came under the non-package tour arrangement rose to USD 211 from USD 185 recorded in 2024. However, the average expenditure of visitors who traveled under the package tour arrangement, slightly decreased to USD 379 from USD 391 registered in 2024 (Chart 2.30).

**Chart 2.30: Average Expenditure by Tour Arrangement**

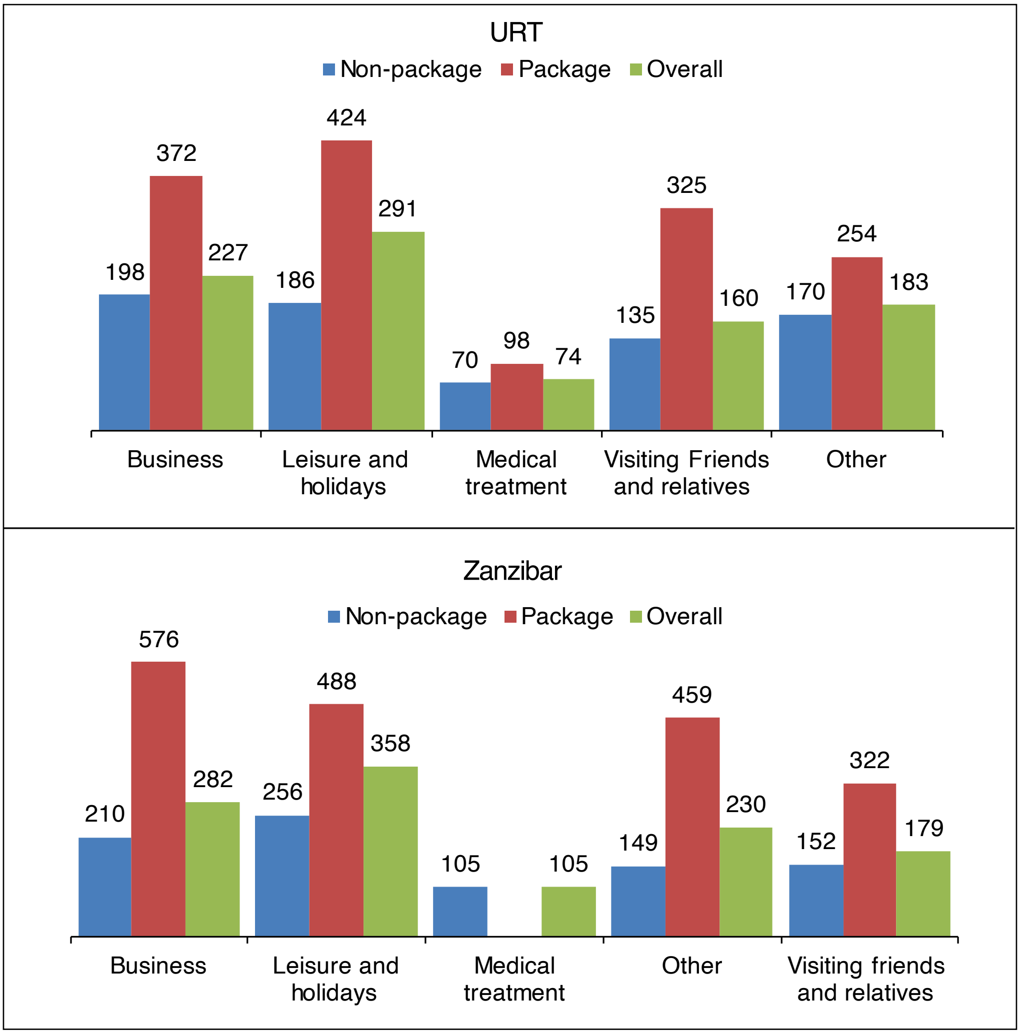
USD




The pattern of average expenditure of visitors by purpose of visit revealed that holiday makers spent the most, followed by business visitors. The overall average expenditure of holiday makers was USD 358 compared to USD 291 in 2024. Like the previous year, visitors who came under the package tour arrangement recorded the highest average expenditure in all purposes of visit (Chart 2.31).

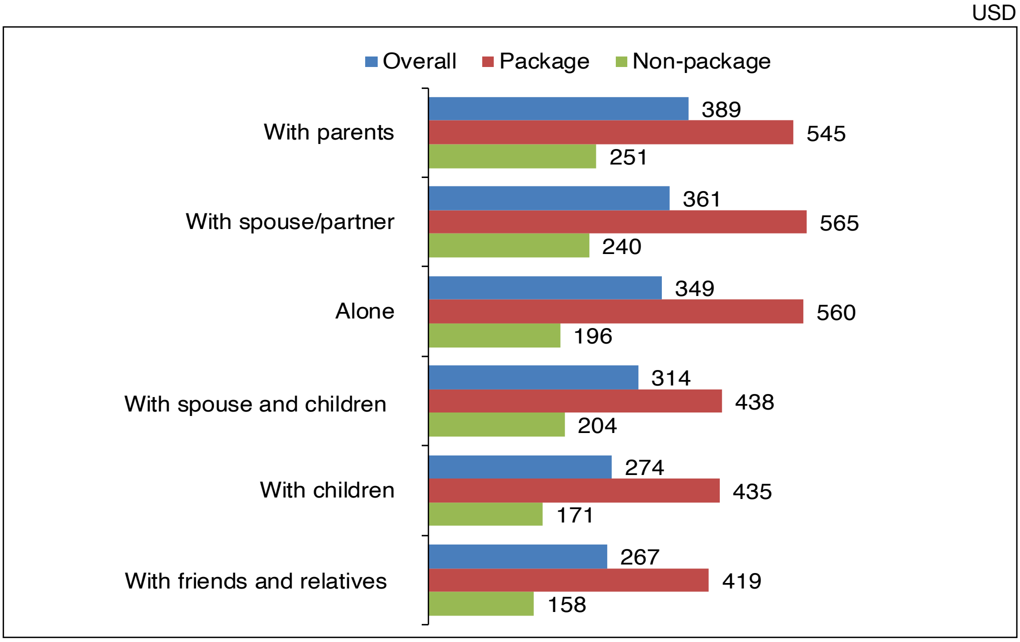
**Chart 2.31: Average Expenditure by Purpose of Visit and Travel Arrangements**

USD




Visitors who traveled with spouse spent the most on average, followed by those traveled alone and with parents. The overall average expenditure of visitors who traveled with spouse was USD 389, while those who traveled with children spent the least with an average expenditure of USD 267 (Chart 2.32).

## Chart 2.32: Average Expenditure by Travel Party and Tour Arrangements




Those engaged in hunting activities continued to dominate, recording the highest overall average expenditure of USD 710.8 per person per night compared to USD 460.1 registered in 2024, equivalent to an increase of 54 percent. Moreover, visitors who came for cultural tourism, wildlife safaris and mountain climbing also depicted high average spending per person per night. Contrarily, visitors who engaged in bird watching spent the least with an overall average expenditure of USD 105.6 per person per night (Table 2.14).

## Table 2.14: Average Expenditure by Activity and Tour Arrangements

| Activity | Travel Arrangement | | Overall |
|---|---|---|---|
| | Non-package | Package | |
| Academic scientific | 76 | 169 | 122 |
| Beach tourism | 179 | 321 | 250 |
| Bird watching | 65 | 146 | 106 |
| Business | 77 | 463 | 270 |
| Conference tourism | 144 | 338 | 241 |
| Cultural tourism | 147 | 927 | 537 |
| Hunting | 646 | 776 | 711 |
| Medical treatment | 136 | 398 | 267 |
| Mountain climbing | 302 | 484 | 393 |
| Shopping | 114 | 257 | 185 |
| Visiting friends and relatives | 96 | 317 | 206 |
| Wildlife safaris | 225 | 678 | 452 |
| Other | 72 | 214 | 143 |

Just like in 2024, visitors from China continued to register the highest average expenditure per person per night in the top 15 tourism source markets. The average expenditure of the Chinese market was USD 551 per person per night in 2025 compared to USD 491 per person per night in 2024. Other tourism markets with high expenditure per person per night were Italy, the United Kingdom, Germany, the United States of America and India. On the other hand, visitors from the Democratic Republic of Congo spent the least, indicating an average expenditure of USD 74 per person per night, followed by visitors from Kenya, Zambia, and Zimbabwe (Table 2.15).

**Table 2.15: Average Expenditure of the Top 15 Source Markets by Tour Arrangements, URT**

USD

| Country of usual residence | Travel Arrangement | | Overall |
|---|---|---|---|
| | Non-Package | Package | |
| United States | 234 | 456 | 345 |
| Italy | 109 | 496 | 263.6 |
| France | 94 | 198 | 132.9 |
| Kenya | 198 | 489 | 294.9 |
| United Kingdom | 134 | 356 | 178.3 |
| Germany | 154 | 335 | 214.1 |
| Zambia | 162 | 304 | 190.7 |
| Netherlands | 111 | 347 | 150 |
| Spain | 249 | 316 | 270.9 |
| DRC | 146 | 248 | 171.3 |
| China | 323 | 746 | 491.8 |
| South Africa | 88 | 82 | 86.1 |
| India | 145 | 319 | 179.6 |
| Canada | 110 | 575 | 226.1 |
| Zimbabwe | 294 | 556 | 346.3 |

## 2.16 Tourism Earnings

Tourism earnings in the United Republic of Tanzania increased by 13 percent to USD 4,410.6 million in 2025, from USD 3,903.1 million recorded in 2024. This performance is mainly driven by increase of international arrivals and average expenditure per person per night. Out of the total earnings, USD 4,233.5 million was earned from tourists who came for leisure and holidays, accounting for 95.9 percent of the total earnings, while earnings from tourists who came for business were the lowest, amounting to USD 42.2 million (Table

2.16). The findings also indicate that about 75.2 percent of total earnings were received from visitors who came under the package tour arrangement, while the rest were received from the tourists who came under the non- package tour arrangement.

Tourism earnings in Zanzibar increased by 19.3 percent to USD 1,190.8 million in 2025, compared with USD 997.8 million in 2024, supported by increase in the number of international visitors. The number of tourist arrivals rose to 654,880 in 2025, from 601,006 in 2024, an increase of 9 percent. Large share of earnings came for leisure and holidays visitors, which was USD 1,188.91 million, while earnings from business and others were the least (Table 2.17). Earnings from visitors under the package tour arrangement accounted for 59.1 percent in 2025, compared to 63.6 percent in 2024.

**Table 2.16: Tourism Earnings by Travel Arrangement and Purpose of Visit, URT**

USD

| Purpose of visit | Travel Arrangement | | Total Earnings |
|---|---|---|---|
| | Package | Non-package | |
| Business | 3.1 | 45.9 | 49.0 |
| Leisure and holidays | 3,023.3 | 899.1 | 3,922.4 |
| Visiting friends and relatives | 4.0 | 91.4 | 95.4 |
| Other | 26.0 | 48.0 | 74.1 |
| Tourism Earnings | 3,056.5 | 1,084.4 | 4,140.9 |

**Table 2.17: Tourism Earnings by Travel Arrangement and Purpose of Visit, Zanzibar**

USD

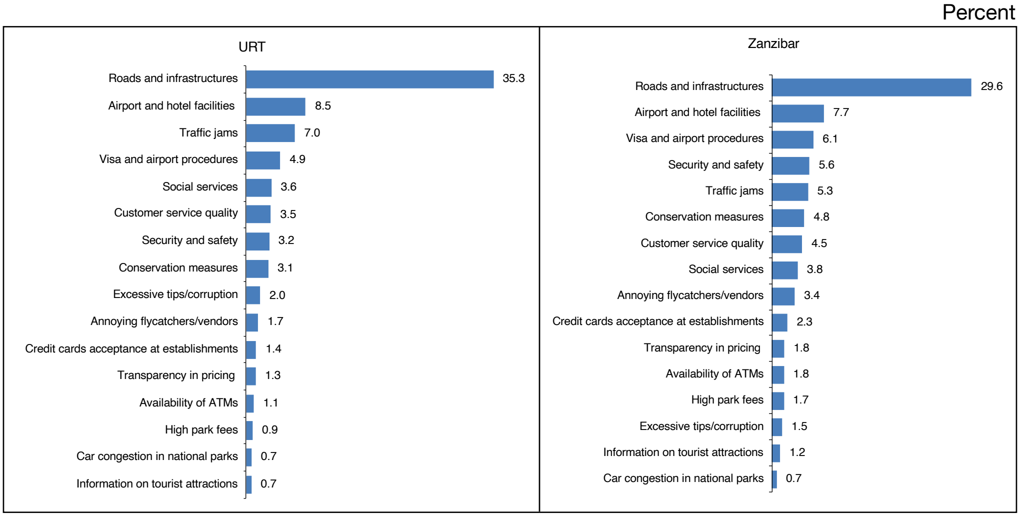
| Purpose of visit | Travel Arrangement | | Total earnings |
|---|---|---|---|
| | Package | Non-package | |
| Business | 0.2 | 0.0 | 0.3 |
| Leisure and holidays | 702.6 | 486.4 | 1,188.9 |
| Visiting friends and relatives | 0.4 | 1.1 | 1.5 |
| Other | 0.0 | 0.1 | 0.1 |
| Tourism earnings | 703.2 | 487.6 | 1,190.8 |

## 2.17 Areas for Improvement

Visitors provided feedback on areas that need improvement including roads and other infrastructures, traffic congestion, some airports and hotel facilities (including toilets, water, air conditioning, and cleanliness), and social services such as education (Chart 2.33). Nonetheless, the government continued with the efforts of improving infrastructure including upgrading airport and public facilities to enhance visitors' comfort, hygiene, and overall experience. Significant investments have been directed towards modernizing key airports—including the ongoing construction of Roads from Duale to Suleto in the Ngorongoro conservation area, Msembe in Ruaha national park and in Mikumi national park. There is also commenced construction of the new Dodoma International airport in Msalato (nearing completion), expansion of the AAKIA Zanzibar airport, and airstrips in Tanga, Lake Manyara, Nyerere national park and Serengeti Mugumu - with improvements focused on passenger amenities, cleanliness, and operational efficiency. Concurrently, the government has actively promoted the private-sector investment in tourism accommodation, supporting the development and upgrading of hotels, lodges, and resorts to higher standards of service and facilities. In addition, the government has increased funding and initiatives for social services, particularly education and healthcare in tourism-dependent regions, to foster community development, improve local livelihoods, and ensure that tourism growth delivers broader societal benefits. Noteworthy, the government has sustained its pursuit of flagship projects in transport infrastructure - encompassing roads, railways, airports, and air transport, which have already delivered measurable improvements in connectivity and are poised to further reduce traffic congestion and enhance access to tourist facilities.

**Chart 2.33: Areas for Improvement**

Percent



# Chapter 3: Sector Outlook

## 3.1 Global Outlook

The number of global tourists fully recovered in 2025, with international tourist arrivals rising by 4 percent to about 1.52 billion, surpassing pre pandemic levels and marking a new post pandemic record. This recovery was supported by increased air connectivity, improved visa facilitation, resilient consumer demand, and a broad-based recovery across regions, particularly in Africa, Asia and the Pacific, although geopolitical tensions and elevated travel costs persisted.

In terms of earnings, global international tourism receipts are estimated at approximately USD 1.9 trillion in 2025, with total tourism export revenues (including passenger transport) reaching around USD 2.2 trillion. Visitor spending has grown faster than arrivals in many destinations, reflecting higher travel costs and a shift toward higher value tourism.

Looking ahead, UN Tourism projects international tourism growth of around 3–4 percent in 2026, reflecting a normalization of growth following the strong rebound in 2023 through 2025. This outlook assumes continued recovery in Asia and the Pacific, stable global economic conditions, easing inflationary pressures, and absence of significant escalation in geopolitical conflicts. However, downside risks to the outlook remain, notably from geopolitical conflicts, climate related disruptions, and restrictive travel and visa policies in some regions.

## 3.2 Domestic outlook

Tanzania's tourism outlook over the medium term is strongly positive, with the sector expected to continue expanding in visitors' number, revenues, and global visibility, provided policy momentum and sustainability efforts are maintained. Following a postpandemic rebound, the sector has transitioned into a phase of structural growth, underpinned by rising international arrivals, stronger earnings, and recognition as Africa's fastestgrowing tourism destination. Growth is expected to remain robust, supported by recovering longhaul markets and regional tourism as Tanzania's brand strengthens.

A key driver of this outlook is Tanzania's enhanced global profile, reinforced by a string of prestigious international and regional awards. Recognition as the World's Leading Safari Destination and repeated accolades for the Serengeti, have strengthened Tanzania's positioning as a premium, naturebased destination, while hosting major global tourism events has elevated its visibility. These developments are helping to raise average spending per visitor, while also attracting private investment across hospitality, aviation, and destination services. Collectively, the awards are accelerating Tanzania's transition from a highpotential destination to an established global tourism brand.

Policy consistency and a supportive macroeconomic environment further strengthen the mediumterm outlook. Tourism remains a top national priority, backed by clear strategic direction focused on diversification, service standards, digital promotion, and conservation linkages, alongside broader economic growth of around 6 percent supported by infrastructure investment. Looking ahead, the greatest opportunities lie in product diversification beyond traditional circuits, while sustainability and diversification will be critical to managing risks and securing longterm resilience.

# Appendices

## Appendix A: Methodology

### I. Introduction

This section presents the methodology used in conducting the International Visitors' Exit Survey. It outlines the survey design, target population, survey instruments, data collection and processing, quality control as well as expenditure estimation procedures. It provides a clear and replicable description of the methodological approach used to generate reliable and representative data about international visitors.

### II. Target Population and Definitions

The target population comprised international visitors departing the country via major exit points during the survey period. An individual is classified as an international visitor if he/she travels to a country outside his/her usual residence for a period of not more than twelve months, with the primary purpose of visit being other than an activity remunerated from within the country visited. This definition aligns with international tourism standards and ensures consistency in data interpretation.

### III. Scope and Coverage

Data were collected at selected exit points, including international airports and land border crossings that accounted for the largest volumes of departing international traffic. It covered eight major departure points namely, Julius Nyerere International Airport (JNIA), Kilimanjaro International Airport (KIA), Abeid Amani Karume International Airport (AAKIA), as well as the Horohoro, Namanga, Tunduma, Mtukula, and Manyovu.

### IV. Sample Size

The sampling frame consisted of all eligible departing international visitors recorded at the exit points during the survey period. The sample survey managed to conduct random interviews with 10,309 respondents, representing a total of 22,838 departing international visitors.

### V. Training of Interviewers

Enumerators participated in a comprehensive training session prior to field deployment. The training aimed to familiarize participants with the survey questionnaire and interviewing techniques. During the session, mock interviews were conducted among enumerators to reinforce proper techniques and ensure consistency across interviewers. Participants were also trained in field editing, data quality control procedures, and fieldwork coordination. The training was guided by the Interviewers' Manual, which served as a key reference document.

### VI. Data Collection

Data collection took place during the peak tourist season, which is from July to September to capture a representative sample of visitors. Interviewers approached selected passengers in departure lounges and other waiting areas to administer the survey face-to-face.  The fieldwork lasted two weeks, running from 11 - 24 August 2025. Supervision was carried out by staff from the Technical Committee, who visited the teams to monitor their work and ensure data quality through consistency checks and verification of questionnaire completeness.

### VII. Interviewer Manual

The Enumerators' Manual was reviewed and used as a reference guide for enumerators throughout the survey. It contained definitions and explanations of key terms used in the questionnaire, detailed descriptions of each question, and outlined a data cross-checking mechanism to ensure accuracy.

### VIII. Questionnaire

The questionnaire was developed to meet users' data requirements, with the aim of generating information to support tourism promotion and macroeconomic policy formulation. Although the content was largely consistent with questionnaires used in previous years, minor modifications were introduced. In total, it included 28 questions organized into four main sections: visitors' profiles, travel behavior, expenditure patterns, and visitors' comments **(Appendix B).**

**Questions 1 to 11** aimed to establish visitors' profiles, including nationality, country of residence, age group, gender, purpose of visit, main activities, type of tourism activity and source of information about Tanzania.

**Questions 12 to 18** focused on travel behavior, including the type of tour arrangement (package or non-package), items included in the package and the number of nights spent.

**Questions 19 to 22** were structured to get information on tourists' expenditure in Tanzania.

**Questions 23 to 25** were designed to determine whether visitors were familiar with the Royal Tour Documentary, whether it was their first visit to Tanzania and whether they were likely to visit again.

**Question 26 to 28** were seeking information from visitors' views on areas of positive impression or potential improvement, as well as their level of satisfaction with the quality of services provided.

## IX. Data Processing

Data processing was conducted using the Kobo toolbox database, a web-based application.

## X. Tourist Expenditure Estimation

The Tourist Expenditure Model developed during the comprehensive visitors' exit survey in 2001 was used to estimate tourism earnings. The model incorporates the following variables: total number of tourist arrivals by purpose of visit, the proportion of visitors by travel arrangement, average expenditure by travel arrangement and purpose of visit, 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, as derived from the survey

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

$V_P$ = Number of arrivals under **package** travel arrangements, estimated from Immigration Department data and disaggregated by purpose of visit using survey findings.

$V_{NP}$ = Number of arrivals under **non-package** travel arrangements, estimated from Immigration Department arrival data and proportionately adjusted according to travel patterns identified in the survey.

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

### The Simplified Model

| Country of Residence | Purpose of Visit | Total Visitors (Sourced from ISD) | Number of Visitors by travel arrangement | | Average Length of stay | Average Expenditure per person per night US$ | | Total Expenditure ($) |
|---|---|---|---|---|---|---|---|---|
| | | | Package | Non-package | | Package | Non-package | |
| (1) | (2) | (3) | (4) | (5) | (6) | (7) | (8) | (9) |
| | Business | | | | | | | |
| | Holiday | | | | | | | |
| | VFR | | | | | | | |
| | Other | | | | | | | |

### Procedure and assumptions used for the estimation of tourist expenditure for 2025:

i. The calculation of average package tour expenditure involved deducting the estimated cost of international airfare to Tanzania and the commission retained by international tour wholesalers. Information on the cost of international transport from source markets was updated using current data obtained from international carriers serving Tanzania.

ii. It was assumed that 10 percent of the package value is retained by the international tour wholesalers to cover overhead costs and commissions. This assumption is based on a study on Tourism Earnings in Tanzania conducted in 2000.

iii. Immigration data on tourist arrivals by purpose of visit were allocated between package and non-package travel arrangements using the travel arrangement ratios established through the survey.

iv. To estimate annual tourist expenditure, the survey results were applied to the total number of tourist arrivals as recorded by the Immigration Department. Given the homogeneity of visitors' characteristics, data collected during the two-week survey period are considered representative of the total tourist population.

v. The Immigration Department also provides data on tourist arrivals to Zanzibar, which enables the estimation of tourist expenditure for Zanzibar.

vi. The average length of stay considered ranged from one to twenty-eight nights.

**THE 2025 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 accurate 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:*

*CODE NUMBER:* ____________________________________________

*NAME OF THE RESEARCHER:*__________________________________

*DATE:*_______________________ *SIGNATURE:* ____________________

*NAME OF THE DATA ENTRANT:* ______________________________

1. Nationality ____________ Country of usual residence ____________

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

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

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

| | | |
|---|---|---|
| Alone | [ ] | ***If alone, go to question 7*** |
| With spouse/partner | [ ] | |
| With spouse and childrenn | [ ] | |
| With children/parents | [ ] | |
| With friends | [ ] | |
| With relatives | [ ] | |

4. Are you are sharing expenses with people you are travelling with?
(tick) Yes [ ] No. [ ] ***(if no go to question 7)***

5. What is the number of persons travelling with you, whose expenses you are sharing? (***except yourself)*** [ ]

6. Write the number of persons you shared expenses with according to the following age groups ***(except yourself)***

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

7. Gender ***(Including yourself)*** Number of females [ ]
Number of males [ ]

8. What is your MAIN purpose of visit to Tanzania ***(tick one only)***

| | | | |
|---|---|---|---|
| Meetings and Conference | [ ] | Leisure and holidays | [ ] |
| Business | [ ] | Medical treatment | [ ] |
| Visiting Friends and Relatives | [ ] | Religion | [ ] |
| Scientific and Academic | [ ] | Transit | [ ] |
| Volunteering | [ ] | Other (specify)............... | [ ] |

9. 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 Safari/Game viewing | [ ] | Mountain Climbing | [ ] |
| Beach tourism | [ ] | Hunting Tourism | [ ] |
| Cultural tourism | [ ] | Visiting Friends and Relatives | [ ] |
| Business | [ ] | Shopping (for business) | [ ] |
| Bird-watching | [ ] | Meetings and conferences | [ ] |
| Medical treatment | [ ] | Forest Walk | |
| Scientific and academic | | Other (please specify) ...................... | |

10. 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. Kilimanjaro | [ ] | Nakupenda Tour | [ ] |
| Udzungwa | [ ] | Serengeti | [ ] | Gombe | [ ] | Beaches Specify | [ ] |
| Jozani Forest | [ ] | Dolphin Tour | [ ] | Spice Tour | [ ] | Museum Specify | [ ] |

Other (Specify) ..................................................................

11. What was the MAIN source of information about Tanzania ***(tick one only)***

| | | | |
|---|---|---|---|
| Travel agents/ Tour operators | [ ] | Inflight magazines | [ ] |
| Friends/relatives | [ ] | Tanzania missions abroad | [ ] |
| Royal tour documentary | | Internent/Website (Please specify) | |
| Trade fair | [ ] | Radio Station (please specify)......... | [ ] |
| Newspapers. Magazines, brochures | [ ] | TV i.e. CNN, BBC, Safari Channel (please specify): ........................... | [ ] |
| Travel advisory | [ ] | Other (please specify )............................... | |

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

| Package | Independently |
|---|---|
| | |

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

| | | | |
|---|---|---|---|
| International transport | [ ] | Sightseeing/excursion/game activities | [ ] |
| Accommodation | [ ] | Guided tour | [ ] |
| Food and drinks | [ ] | Travel insurance | [ ] |
| Transportation within Tanzania | [ ] | Other (please specify) ............... | [ ] |
| Visa | [ ] | | |

14. Total cost of the package tour:

| Currency | Amount |
|---|---|
| | |

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

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

| |
|---|
| |

17. Number of nights spent in:

| | |
|---|---|
| Tanzania Mainland | |
| Zanzibar Islands | |

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

| Currency | Amount |
|---|---|
| | |

18. What was your first point of entry to Tanzania? (tick)

| | |
|---|---|
| Tanzania Mainland | |
| Zanzibar Islands | |

19. How much money did you spend WHILE in Tanzania during this trip including cash, Debit/Credit cards, Digital currency?
***(please give your best estimate in case you do not remember the exact figures)***

| Currency | Amount |
|---|---|
| | |

20. Please give a breakdown of the amount indicated on question 19;

| Items | Currency code | Amount |
|---|---|---|
| Accomodation (hotel, lodge, camp site etc) | | |
| Food and drinks | | |
| Transportation within Tanzania by | | |
| Air (Including charter hire) | | |
| Road (Including car hire) | | |
| Water (Including Boat hire) | | |
| Railway | | |
| Cultural services charges (Museums, Historical sites, etc.) | | |
| Hot air Ballon | | |
| Sports and recreational (kitesurfing, cycling etc) | | |
| Diving, snorkelling and water games | | |
| Sightseeing and excursion (Safari) | | |
| Mountain climbing | | |
| Hunting | | |
| Access/entry/gate fees | | |
| Visa fees | | |
| Fuel (Transit cars, foreign owned vehicles excluding trucks) | | |
| Charges related to international vehicle pick up | | |
| Gifts such us precious metals, crafts, etc and personal shopping | | |
| Tips | | |
| Donations (tick) Health [ ], Education [ ], Sports [ ], Charity [ ], Religious [ ], social and cultural [ ], | | |
| Shopping (for business) | | |
| 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?

***(List in order of preference 1 being the most preferred i.e 1,2,3..)***

Cash [ ] Credit/Debit Card [ ] Mobile Money [ ] Digital Currency [ ]

Other (Please specify): ……………………………………………………………

23. Did the Royal Tour Documentary influence your decision to visit Tanzania?

Yes [ ] No [ ]

Please explain ______________________________________________

______________________________________________________________

24. Is this your first trip to Tanzania? (tick) Yes [ ] No [ ]

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

26. What impressed you most during your trip to Tanzania? ***(Please specify)***
………………………………………………………………………………………
………………………………………………………………………………………
………………………………………………………………………………………

27. Were you satisfied with the quality of services provided to you while in Tanzania? Yes [ ] No [ ]
Please explain ……………………………………………………………………
………………………………………………………………………………………
………………………………………………………………………………………

28. What would you consider the most important areas that need improvements?
***(Please specify)*** : ……………………………………………………………
………………………………………………………………………………………
………………………………………………………………………………………
………………………………………………………………………………………

## Appendix C: Interviewed International Visitors by Country of Residence

| S/n | Source Country | Visitors | Share |
|---|---|---|---|
| 1. | United States | 2,832 | 12.4 |
| 2. | Italy | 2,703 | 11.8 |
| 3. | France | 1,589 | 7.0 |
| 4. | Kenya | 1,460 | 6.4 |
| 5. | United Kingdom | 1,360 | 6.0 |
| 6. | Germany | 1,105 | 4.8 |
| 7. | Zambia | 1,070 | 4.7 |
| 8. | Netherlands | 872 | 3.8 |
| 9. | Spain | 815 | 3.6 |
| 10. | The Democratic Republic of Congo | 734 | 3.2 |
| 11. | China | 719 | 3.1 |
| 12. | South Africa | 544 | 2.4 |
| 13. | India | 509 | 2.2 |
| 14. | Canada | 468 | 2.0 |
| 15. | Zimbabwe | 464 | 2.0 |
| 16. | Burundi | 459 | 2.0 |
| 17. | Uganda | 452 | 2.0 |
| 18. | Australia | 444 | 1.9 |
| 19. | Poland | 337 | 1.5 |
| 20. | Belgium | 324 | 1.4 |
| 21. | Austria | 239 | 1.0 |
| 22. | Greece | 234 | 1.0 |
| 23. | Switzerland | 228 | 1.0 |
| 24. | Israel | 227 | 1.0 |
| 25. | United Arab Emirates | 188 | 0.8 |
| 26. | Algeria | 140 | 0.6 |
| 27. | Norway | 133 | 0.6 |
| 28. | Czech Republic | 115 | 0.5 |
| 29. | Portugal | 93 | 0.4 |
| 30. | Russian Federation | 92 | 0.4 |
| 31. | Taiwan | 92 | 0.4 |
| 32. | Sweden | 91 | 0.4 |
| 33. | Singapore | 89 | 0.4 |
| 34. | Malaysia | 89 | 0.4 |
| 35. | Japan | 81 | 0.4 |
| 36. | Rwanda | 78 | 0.3 |
| 37. | New Zealand | 77 | 0.3 |
| 38. | Mozambique | 67 | 0.3 |

| S/n | Source Country | Visitors | Share |
|---|---|---|---|
| 39. | Brazil | 66 | 0.3 |
| 40. | Mexico | 66 | 0.3 |
| 41. | Nigeria | 60 | 0.3 |
| 42. | Oman | 58 | 0.3 |
| 43. | Denmark | 47 | 0.2 |
| 44. | Thailand | 45 | 0.2 |
| 45. | Ireland | 44 | 0.2 |
| 46. | Argentina | 41 | 0.2 |
| 47. | Comoros | 35 | 0.2 |
| 48. | Korea, Republic of | 35 | 0.2 |
| 49. | Korea, Democratic People's Republic of | 34 | 0.1 |
| 50. | Turkey | 33 | 0.1 |
| 51. | Qatar | 31 | 0.1 |
| 52. | Morocco | 29 | 0.1 |
| 53. | Ethiopia | 28 | 0.1 |
| 54. | Swaziland | 27 | 0.1 |
| 55. | Saudi Arabia | 26 | 0.1 |
| 56. | Hungary | 25 | 0.1 |
| 57 | Philippines | 23 | 0.1 |
| 58. | Romania | 23 | 0.1 |
| 59. | Cameroon | 22 | 0.1 |
| 60. | Finland | 20 | 0.1 |
| 61. | Indonesia | 19 | 0.1 |
| 62. | Egypt | 18 | 0.1 |
| 63. | Saint Kitts And Nevis | 18 | 0.1 |
| 64. | Cyprus | 16 | 0.1 |
| 65. | Malawi | 14 | 0.1 |
| 66. | Uruguay | 14 | 0.1 |
| 67. | Vietnam | 14 | 0.1 |
| 68. | Ghana | 13 | 0.1 |
| 69. | South Sudan | 12 | 0.1 |
| 70. | Luxembourg | 11 | - |
| 71. | Haiti | 11 | - |
| 72. | Kuwait | 11 | - |
| 73. | Chile | 10 | - |
| 74. | Congo-Brazzaville | 9 | - |
| 75. | Madagascar | 9 | - |
| 76. | Belarus | 9 | - |
| 77. | Burkina Faso | 9 | - |
| 78. | Mauritania | 8 | - |

| S/n | Source Country | Visitors | Share |
|---|---|---|---|
| 79. | Costa Rica | 7 | - |
| 80. | Colombia | 7 | - |
| 81. | Tunisia | 7 | - |
| 82. | Slovakia | 7 | - |
| 83. | Cote D'Ivoire | 7 | - |
| 84. | Ecuador | 7 | - |
| 85. | Pakistan | 6 | - |
| 86. | Ukraine | 6 | - |
| 87. | Lebanon | 6 | - |
| 88. | Cambodia | 6 | - |
| 89. | Sri Lanka | 6 | - |
| 90. | Iceland | 6 | - |
| 91. | Gabon | 6 | - |
| 92. | Peru | 5 | - |
| 93. | Reunion | 5 | - |
| 94. | Angola | 5 | - |
| 95. | Chad | 5 | - |
| 96. | Djibouti | 4 | - |
| 97. | Armenia | 4 | - |
| 98. | Barbados | 4 | - |
| 99. | Namibia | 4 | - |
| 100. | Bosnia and Herzegovina | 4 | - |
| 101. | Venezuela | 4 | - |
| 102. | Senegal | 4 | - |
| 103. | Somalia | 3 | - |
| 104. | Sudan | 3 | - |
| 105. | Nepal | 3 | - |
| 106. | Benin | 3 | - |
| 107. | Trinidad and Tobago | 3 | - |
| 108. | Jordan | 3 | - |
| 109. | Iran, Islamic Republic of | 3 | - |
| 110. | Afghan | 3 | - |
| 111. | Malta | 3 | - |
| 112. | Botswana | 2 | - |
| 113. | Panama | 2 | - |
| 114. | Bangladesh | 2 | - |
| 115. | Mauritius | 2 | - |
| 116. | Latvia | 2 | - |
| 117. | Estonia | 2 | - |
| 118. | Georgia | 2 | - |

| S/n | Source Country | Visitors | Share |
|---|---|---|---|
| 119. | West India | 2 | - |
| 120. | Turkmenistan | 2 | - |
| 121. | Honduras | 1 | - |
| 122. | Monaco | 1 | - |
| 123. | Serbia | 1 | - |
| 124. | Kazakhstan | 1 | - |
| 125. | Andorra | 1 | - |
| | Total | 22,838 | 100 |

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