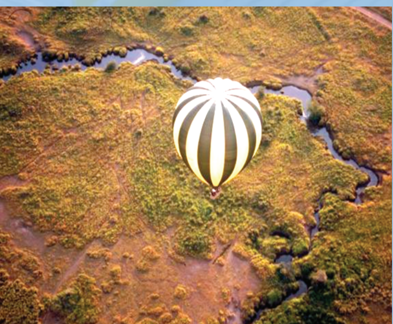
THE 2011 INTERNATIONAL VISITORS' EXIT SURVEY REPORT

TANZANIA TOURISM SECTOR SURVEY



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THE 2011 INTERNATIONAL VISITORS'
EXIT SURVEY REPORT

April 2013

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ACRONYMS

AAKIA	Abeid Aman Karume International Airport
ATCL	Air Tanzania Company Limited
BOP	Balance of Payments
BOT	Bank of Tanzania
FDI	Foreign Direct Investments
ILO	International Labour Organization
JNIA	Julius Nyerere International Airport
KAS	Kasumulo
KIA	Kilimanjaro International Airport
MDGs	Millennium Development Goals
MOFAIC	Ministry of Foreign Affairs and International Cooperation
MOFEA	Ministry of Finance and Economic Affairs
MID	Ministry of Infrastructure Development
MITM	Ministry of Industry, Trade and Marketing
MLHHSD	Ministry of Land, Housing and Human Settlements Development
MNRT	Ministry of Natural Resources and Tourism
MoT	Ministry of Transport
NAM	Namanga
NBS	National Bureau of Statistics
PMO-RALG	Prime Minister's Office- Regional Administration and Local Government
TAA	Tanzania Airport Authority
TANAPA	Tanzania National Parks Authority
TIC	Tanzania Investment Centre
TTB	Tanzania Tourist Board
TTSS	Tanzania Tourism Sector Survey
TUN	Tunduma
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	United Nations World Tourism Organization
URT	United Republic of Tanzania
VFR	Visiting Friends and Relatives
WHC	World Heritage Centre
ZATI	Zanzibar Association of Tourism Investors
ZCT	Zanzibar Commission for Tourism

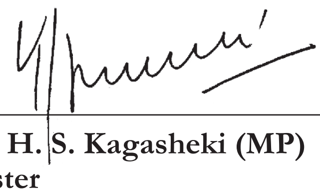
FOREWORD

Tourism, which is one of the leading sectors in Tanzania, has recorded an improved performance in recent years. This is evidenced by the increase in the number of tourist arrivals from 782,699 in 2010 to 867,994 in 2011. Likewise, tourism earnings grew by 8.4 percent, from USD 1,254.50 million in 2010 to USD 1,353.2 million in 2011. The good performance is largely attributed to the macroeconomic reforms and increased promotion of Tanzania as a unique tourist destination.

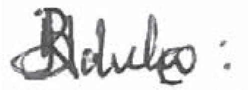
In view of the foregoing, we are glad to introduce the 2011 Tanzania Tourism Sector Survey Report (TTSS) produced by the multi-institutional committee comprising the Ministry of Natural Resources and Tourism (MNRT), Bank of Tanzania (BOT), National Bureau of Statistics (NBS), Immigration Department and the Zanzibar Commission for Tourism (ZCT).

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

The 2011 survey has indicated that there has been an improved performance of the tourism industry, evidenced by a significant increase in earnings from international visitors. Most of the visitors were impressed with Tanzania as one of the unique quality destinations with friendly people and wonderful scenery. However, a number of visitors indicated the need for further improvement of infrastructure particularly, airports, airstrips and roads leading to tourist attractions. It is expected that this report will be a useful source of information to policy makers, investors, academicians and other stakeholders in the tourism industry.



Amb. H. S. Kagasheki (MP)
Minister
Ministry of Natural Resources and Tourism



Prof. Benno Ndulu
Governor
Bank of Tanzania

ACKNOWLEDGEMENT

The Steering Committee of the Tanzania Tourism Sector Survey (TTSS) wishes to convey heartfelt thanks and appreciation to all those who were behind the successful completion of the 2011 International Visitors' Exit Survey. Special appreciation should go to the Chief Executives of the participating institutions namely; the Ministry of Natural Resources and Tourism, Bank of Tanzania, National Bureau of Statistics, Immigration Department, Zanzibar Commission for Tourism and the Tourism Confederation of Tanzania, for their valuable support and guidance.

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

The report was prepared under the overall supervision of Mr. I. A. Mussa (Director of Tourism – MNRT) and Dr. J. L. Masawe (Director Economic Research and Policy-BOT). The Technical Team was led by P. Mwiru (MNRT), in collaboration with Mrs. G. Mwakibolwa (Manager, International Economics and Trade Department - BOT). Other members of the team were C. Masenya (BOT), V. W. Kejo (BOT), P. Mboya (BOT), J. Msimbano (MNRT), V. Tesha (NBS), T. Mwisomba (NBS), J. Rugemalila (NBS), C. Mndeme (Immigration Department) and M. Jaffer (ZCT), while R. Barongo from BOT managed data processing.

EXECUTIVE SUMMARY

Background

This report presents the findings of the 9th round of the International Visitors' Exit Survey conducted between August and September 2011.

The survey was administered in the six departure points used in the previous surveys namely; the Julius Nyerere International Airport, Kilimanjaro International Airport, Abeid Aman Karume International Airport, Namanga, Kasumulo and Tunduma border points.

The survey was jointly administered by the Ministry of Natural Resources and Tourism, Bank of Tanzania, National Bureau of Statistics, Immigration Department and the Zanzibar Commission for Tourism.

Main Findings

Tourism Earnings

In 2011, tourism earnings increased by 8.4 percent to USD 1,353.2 million, compared to the amount recorded in 2010.

The overall average expenditure per person per night rose from USD 256 recorded in 2010 to USD 286 in 2011, with visitors under the package tour arrangement spending more compared to those under the non-package arrangement.

Italy, UK and USA Remained the Dominant Source Markets

Italy, the United Kingdom and the United States of America continued to be the main source markets in Tanzania, accounting for 45.0 percent. The dominance of these three countries has prevailed since the inception of the survey in 2001.

Majority (80.0 percent) of Visitors Came for Leisure and

Holidays

Like in the previous surveys, for most tourists, leisure and holidays has been the main purpose of their visit to Tanzania. These visitors mainly came from Italy, the United Kingdom and United States of America.

Most Visitors were of the Age Group of 25-44 Years

Survey results indicate that 48.0 percent of the interviewed respondents were in the age group of 25-44 years, followed by the age group of 45-64. Senior citizens (65+) continued to record the smallest proportion.

Wildlife and Beach Tourism were the Main Tourism Activities

The survey revealed that wildlife and beach tourism were the main activities, with wildlife tourism being more pronounced in the Mainland and beach tourism in Zanzibar. Visitors going for wildlife and beach activities were mainly from the United States of America and Italy.

Air was the Main Mode of Transportation

The survey results indicate that the majority of visitors (about 79.1 percent) departed by air and the remaining departed through land border posts. In addition, all departure points with the exception of Tunduma, recorded the highest number of visitors who came for leisure and holidays. The largest share of business visitors departed through Tunduma.

Visitors were Concerned with the State of the Roads and Airport Facilities

About 65.0 percent of the visitors to Tanzania expressed their concern on the state of the roads as well as airports and their facilities like washrooms, electricity and water. The quality of services was also pointed out to be among the areas that need improvement. Additionally, visitors complained about unacceptability of credit cards at most of the tourism establishments.

Recommendations

The survey provides the following recommendations:

- The survey findings show that Europe and America continued to be the dominant tourist source markets for Tanzania. While efforts are needed to retain the large number of visitors from this part of the world, deliberate initiatives between the Government and the private sector should be taken to attract visitors from other source markets notably, Brazil, Russia and China. Such initiatives should include enhanced marketing of Tanzania as a competitive and unique tourists' destination; as well as development of new products other than wildlife, mountain climbing and beaches. Products like cultural, historical and agro tourism need to be developed.

- The ongoing government efforts to address the existing infrastructural problems in the country are commended. However, challenges still remain on further improvement of JNIA, KIA and airstrips, particularly those located in the national parks, as well as roads leading to the tourism attractions.

- Enhance availability and accessibility of information materials to tourists at both source markets and entry points. The materials can be in the form of leaflets, guide maps and brief handbooks describing information about places to be visited.

- In light of the ongoing competition in the tourism industry, the quality of services has become an important factor in determining the success of the tourism sector. Delivering quality service is one of the key factors in encouraging repeat visits.

  In view of this, there is a need to improve the quality of services delivered to visitors. This can be attained through designing tailor-made programs, focusing on customer care services at the hospitality institutions.

- Visitors also complained on the cleanliness of the environment particularly in the cities, towns, side roads, streets and national parks.

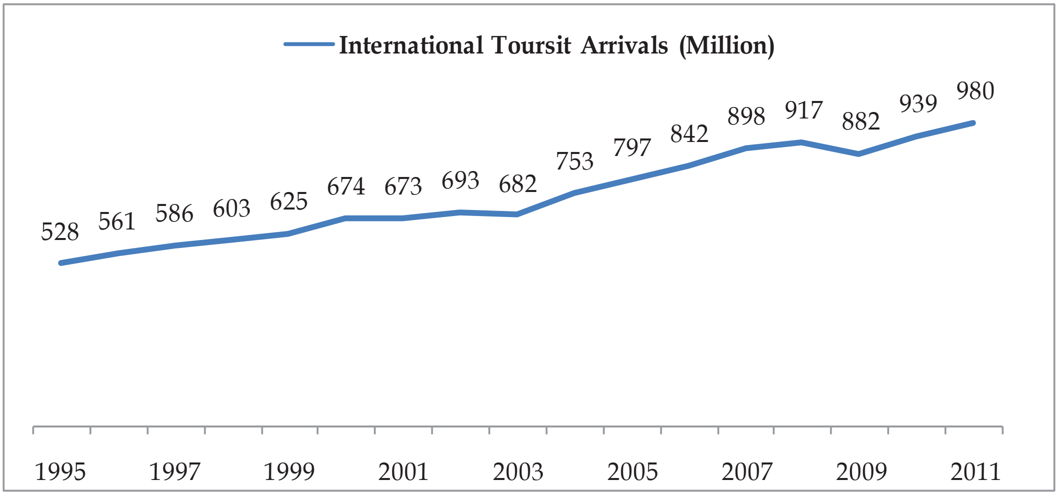
  Therefore, there is a need to enforce municipal laws on cleanliness and public awareness about usage of garbage collection facilities like dustbins placed along the roads.

Chapter 1 | Recent Developments in the Tourism Industry in 2011

1.1 Global Perspective

Tourism continued to be one of the dynamic industries in the global economy as it improved in 2011 after the global economic and financial crisis. According to the World Tourism Barometer, January 2012, the industry accounted for about 5.0 percent of world Gross Domestic Product (GDP) and 6.0 percent of total world exports. Following a year of global recovery in 2010, international tourism continued to contribute to the return to growth. For instance, international tourist arrivals increased by 4.4 percent to 980 million in 2011 from 939 million recorded in 2010 **(Chart 1.1).**

Chart 1.1: International Tourist Arrivals, 1995 - 2011

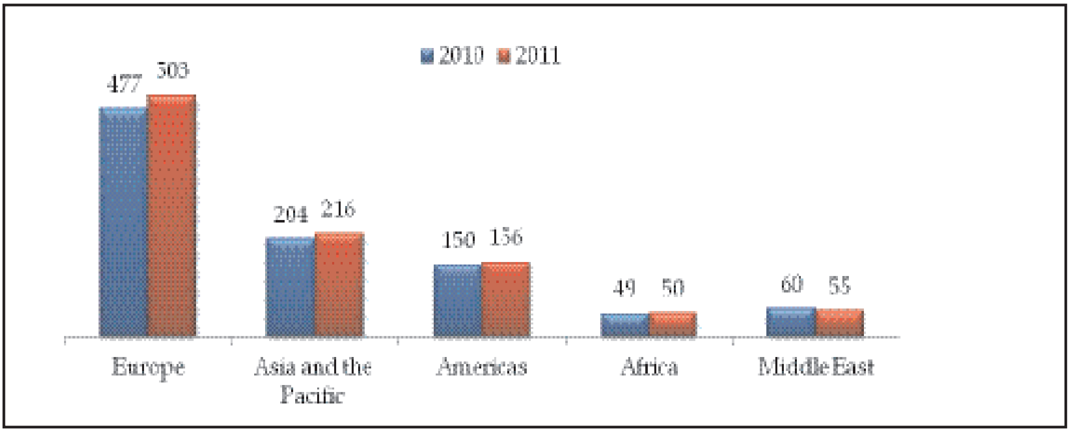


Source: UNWTO Barometer, January 2012

In 2011, all the regions except Middle East, posted positive growth in the number of international tourist arrivals **(Chart 1.2).** The increase in tourist arrivals was more pronounced in Europe, where the number of international tourist arrivals went up by 5.5 percent to 503 million in 2011. This was a record year for travel to Europe surpassing the peak set in 2008. The recovery was broad in all destinations with a growth ranging from 3.0 percent in the United Kingdom to more than 20.0 percent in Latvia and Lithuania. The hotel sector enjoyed broad-based growth, whereby occupancy rates increased by 4.2 percent and 3.2 percent in America and Europe, respectively.

In Asia and the Pacific, international tourist arrivals grew by 5.9 percent to 216 million mainly due to strong intra-regional demand. In America, tourist arrivals went up by 4.0 percent to 156 million, while Africa recorded an increase of 2.0 percent to 50 million in 2011. In contrast, tourist arrivals in the Middle East declined by 8.3 percent to 55 million in 2011, partly due to the ongoing political turmoil.

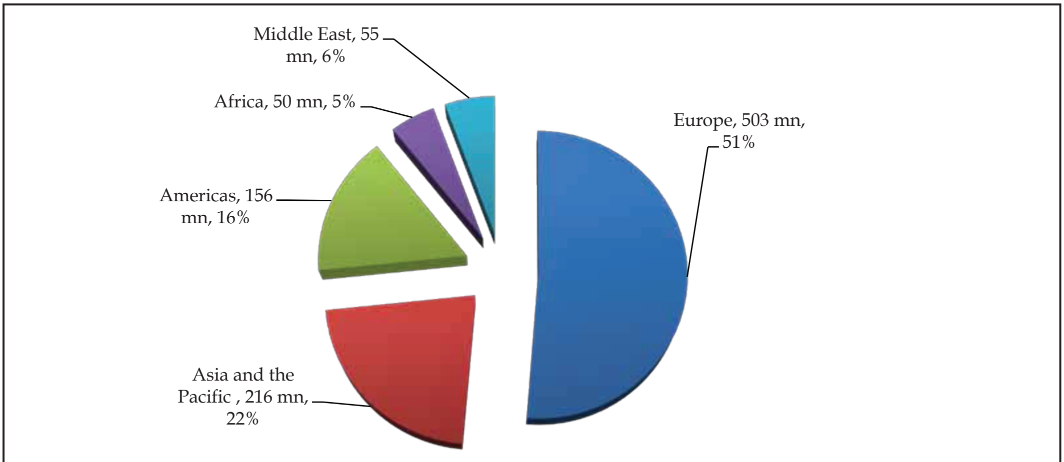
Chart 1.2: International Tourist Arrivals by Regions, 2010 - 2011 Millions of USD



Source: UNWTO Barometer, January 2012

Europe maintained its largest share of international tourist arrivals (51 percent), followed by Asia and the Pacific (22 percent), Americas (16 percent), the Middle East (6 percent), while Africa accounted for the smallest share (5 percent) as indicated in **Chart 1.3.** The same pattern was observed in 2010.

Chart 1.3: The Market Share of International Tourist Arrivals, 2011



Source: World Tourism Organization, (UNWTO, 2012)
Note: mn=million

In line with increase in the number of international tourist arrivals, international tourism receipts was USD 1,030.4 billion in 2011, representing an increase of 11.1 percent from USD 927.6 billion recorded in 2010. Region-wise, both Europe and Asia and the Pacific recorded the largest increase in tourism receipts in 2011 (13.2 percent), followed by Americas (10.2 percent) and Africa (7.2 percent). The Middle East was the only region that posted negative growth (-11.2 percent). Europe, Asia and the Pacific and the Americas accounted for the largest share of international tourism receipts (92.4 percent). Africa was the least as it accounted for 3.2 percent **(Table 1.1).**

Table 1.1: International Tourism Receipts

Region	Billions of USD 2010	Billions of USD 2011	% Change	Share (%) 2011
Europe	409.3	463.4	13.2	45.0
Asia and the Pacific	255.2	289.0	13.2	28.0
Americas	181.0	199.5	10.2	19.4
Africa	30.4	32.6	7.2	3.2
Middle East	51.7	45.9	-11.2	4.5
World	**927.6**	**1,030.4**	**11.1**	**100.0**

Source: UNWTO Barometer, May 2012

Tourism Expenditure in Brazil, Russia, India, and China (BRIC)

In 2011, most source markets generated strong demand particularly the BRIC. For instance, expenditure on international tourism in China increased by 32.7 percent to USD 73.0 billion, in the Russian Federation by 23.1 percent to USD 32 billion, in Brazil by 31.3 percent to USD 21.0 billion and in India by 27.3 percent to USD 14.0 billion. In aggregate, the BRIC accounted for 13.6 percent of the world's source market by expenditure.

Tourist Receipts in Advanced and Emerging Economies

According to UNWTO Barometer (2012), both advanced and emerging economies benefited from the 2011 growth in international tourist arrivals and receipts. The destinations where international tourism receipts grew by 12 percent or more were the United States, Spain, France, Thailand and Hong Kong **(Table 1.2).** Furthermore, significant increases on lower base value destinations were reported by Singapore, the Russian Federation, Sweden, India, the Republic of Korea and Turkey.

Table 1.2: Tourism Receipts in Advanced and Emerging Economies

Region	Billions of USD		
	2010	2011	% Change
United States of America	103.0	116.0	12.6
Spain	53.0	60.0	13.2
France	47.0	54.0	14.9
Thailand	20.0	26.0	30.0
Hong Kong	22.0	27.0	22.7

Source: UNWTO Barometer, May 2012

Besides international tourism receipts, which is a travel item of the Balance of Payments; tourism generated export earnings through international passenger transport. The latter amounted to an estimated USD 196 billion in 2011, bringing total receipts generated by international tourism to USD 1.2 trillion, or USD 3.4 billion a day on average.
Currently, international tourism (travel and passenger transport) accounts for 30.0 percent of the world's exports of services and 6.0 percent of overall exports of goods and services. In 2011, tourism ranked fourth in the world's export category, after fuels, chemicals and food.

Forecasts from the UNWTO indicate that international tourism will continue to grow in 2012 although at a lower rate. It is projected that international tourist arrivals will increase by between 3.0 to 4.0 percent, reaching the historic level of one billion by the end of 2012. Emerging economies will regain the lead with stronger growth in Asia and the Pacific; and Africa (4.0 to 6.0 percent), followed by the Americas and Europe (2.0 to 4.0 percent). Meanwhile, the Middle East is forecasted to recover (0 to 5.0 percent) part of its losses recorded in 2011. According to the European Travel Commission, travel to European destinations is expected to slow down in 2012 due to combination of fiscal austerity and financial market stress, brought about by the Euro zone debt crisis which is expected to affect both consumer and business behaviors.

1.2 East African Perspective

The number of international tourist arrivals in Kenya went up to 1.8 million in 2011 from 1.6 million recorded in 2010. This was mainly due to increased promotional efforts which were a result of more resources allocation and availability of a strong national carrier, the Kenya Airways that flies directly to the source markets. Meanwhile, tourism earning increased by 18.5 percent to USD 1,101.2 million in 2011 from USD 929.4 million recorded in 2010; consistent with the rise in the number of international tourist arrivals.

Uganda recorded a total number of international tourist arrivals of 1.2 million in 2011, representing an increase of 21.7 percent when compared with 2010. The majority of tourists came for visiting friends and relatives, followed by business and professional visitors. Those who came for leisure, recreation and holidays were the least.

1.3 Tanzanian Perspective

1.3.1 Tourism Performance

Tourism is among the most important industries in Tanzania, as it accounted for an average of about 23 percent of total export of goods and services during the last five years. The number of tourist arrivals increased from 782,699 in 2010 to 867,994 in 2011. Likewise, tourism earnings grew by 8.4 percent, from USD 1,254.50 million in 2010 to USD 1,353.2 million in 2011.

1.3.2 Promotion and Marketing

In 2011, the Tanzania Tourist Board (TTB) participated in 19 International Tourism exhibitions outside the country, with the aim of promoting Tanzania as a quality tourist destination. The main exhibitions included the World Travel Market (WTM) in London, the International Tourism Bourse in Berlin and INDABA in South Africa. In addition, more than 12,000 copies of "Tan Travel Magazine" and 8,000 copies of a generic brochure, titled, "Tanzania, the Land of Kilimanjaro, Zanzibar and the Serengeti" were published in Kiswahili, English, Russian, Japanese and Arabic languages.

1.3.3 Domestic and International Flights

Precision Air of Tanzania launched three new routes in August 2011; two international and one domestic. Precision Air now flies three times per week to Moroni, the capital of the Comoros, the island nation off the east coast of Africa. The 128-seat 737-300 aircraft, will add to the existing three times per week Comoros Aviation's routes. The new route is expected to increase the number of international tourists coming from the Islands of the Comoros. Precision Air also launched a new route between Dar es Salaam and Johannesburg, South Africa, four times per week. The frequencies of the flights were increased to five times per week in October 2011. The new route perfectly links the tourists moving from the international hub of Johannesburg or other Southern African destinations to the fabulous Tanzanian tourist attractions.

In terms of domestic flights, Precision Air also began flying between Mwanza and Kigoma. The 450-kilometre route is operated four times per week, with 48-seat ATR42 aircraft, adding to the daily services of Auric Air. This route is expected to increase the number of tourists visiting the attractions located in Kigoma Region.

Qatar Airways has also increased its number of flights between Doha and Dar es Salaam, from 7 to 11 flights a week, with effect from January 2011. All flights will be operated by Qatar Airways Airbus A320 aircraft. The increase in the number of flights is expected to increase the number of tourists visiting Tanzania, since Doha is a hub linking many destinations in the world, and therefore providing more choices, flexibility and options of travelling to Tanzania.

Ethiopian Airlines has increased its daily flights to Tanzania, targeting the northern tourist circuit and Zanzibar. Ethiopian Airlines has been a long-serving carrier which has contributed significantly to the Tanzania's tourism industry, as it is the only international airline that lands in the three major airports (KIA, JNIA and AAKIA) in Tanzania.

1.3.4 Dar es Salaam City Tourism

Dar es Salaam city has a number of tourist attractions which include; the great city history, arts and crafts, traditional life style, sets of islands (Bongoyo, Mbudya, Sinda, Pungavini, etc.), beaches, forests, museums, heritage and historical buildings with a mix of unique architecture, gardens, open spaces and spectacular waterfronts with unique coastal frontage. In promoting Dar es Salaam as a tourist destination, the Dar es Salaam Tourism Executive Board (DTEB) has taken the following initiatives:

- Published the "Tourist Guide Book", which provides relevant information for tourists. This information includes hotels, restaurants, health and safety tips, history and attractions of Dar es Salaam, cuisine and Dar es Salaam city map.

- Offered training on customer care, basic communication skills, tourism city's attractions. Also, training in traffic rules and regulations was provided to 172 taxi drivers from the Julius Nyerere International Airport, City Hotels, Ubungo Bus Terminal, Zanzibar Boat Terminal and Bagamoyo. The objective of the training was to improve their skills in how to handle tourists in order to ensure repeat business which is crucial to the tourism industry.

- Establishment of the tourist desk at the Julius Nyerere International Airport with the aim to provide tourist information.

1.3.5 The National College of Tourism

The new campus of the National College of Tourism (Bustani Campus) was inaugurated by His Excellence Dr. Jakaya. M. Kikwete, the President of the United Republic of Tanzania, on 10th December 2011. The college is fully equipped with the state-of-the-art training and demonstration facilities, laboratories, services and conference venues, among many others. The newly built campus is expected to increase the number of students' enrolment up to 605, which is twice the previous years' enrolment. The campus offers courses on hospitality, both at certificate and diploma levels. It is expected that the college will produce qualified and competent personnel in the hospitality industry. However, the big challenge is sustainable funding for running the college to its full capacity.

The official opening of the National College of Tourism (Bustani Campus) by His Excellency Dr. Jakaya M. Kikwete, the President of the United Republic of Tanzania

Chapter 2 | Analysis of Survey Results

2.1 Introduction

This chapter provides analysis of the results from the survey which was conducted in 2011. The analysis focuses on source markets, age, gender, purpose of visit, tour arrangements, nights spent, primary activities, areas of improvement and the expenditure pattern.

2.2 Source Markets

Table 2.1 depicts the top fifteen source markets representing 83.1 percent of all visitors. Like in the previous survey, Italy, the United Kingdom and United States of America continued to be the main source markets to Tanzania.

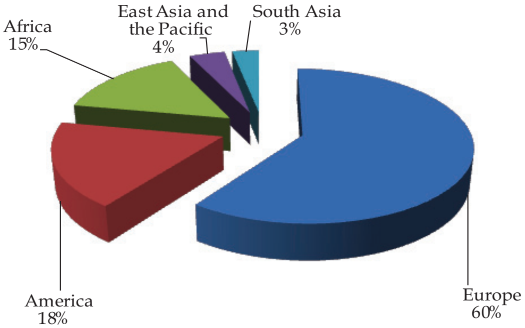
Table 2.1: Top 15 Source Markets to Tanzania, 2011

S/N	Country of Residence	Number of Visitors	% of Total
1	Italy	2,106	19.2
2	United Kingdom	1,514	13.8
3	United States of America	1,313	12.0
4	Germany	632	5.8
5	Spain	593	5.4
6	South Africa	506	4.6
7	France	503	4.6
8	Australia	388	3.5
9	Canada	373	3.4
10	Kenya	264	2.4
11	Zambia	221	2.0
12	Netherlands	209	1.9
13	Belgium	188	1.7
14	Austria	170	1.5
15	India	152	1.4
16	Others	1,851	16.9
	TOTAL	10,983	100.0

The dominance of Europe and North America as the main source markets to Tanzania still prevails **(Chart 2.1).** This is partly due to enhanced promotional campaigns which were carried out in these regions, such as the promotion of the Tanzanian tourist attractive icons in the English Premier League which were conducted between November 2010 and May 2011. However, over-reliance on these blocs poses a challenge in case of economic problems. For instance, the recent sovereign debt crisis facing the

Euro zone might affect both consumer and business behaviors, and hence the travel pattern. This calls for stepped-up promotional efforts in other source markets such as Brazil, Russia, India and China in order to minimize the impact of the crisis.

Chart 2.1: The Market Share of Tourists by Regions, 2011



Statistics from the Immigration Department indicate that Kenya, the United Kingdom, Zambia and the United States of America were the major tourist source markets to Tanzania in 2011 **(Table 2.2).** Most of the source markets are the same as those recorded during the survey. However, the distribution of the main source markets compiled by the Immigration Department slightly vary from that of the survey because the immigration data covers the whole year of 2011 and from all exit points, while the survey collects data for only two weeks and covers six major exit points.

Table 2.2: Top 15 Source Markets to Tanzania, 2011 (Immigration Data)

S/N	Country of Residence	Number of Visitors	% of Total
1	Kenya	171,473	19.8
2	United Kingdom	58,369	6.7
3	Zambia	47,898	5.5
4	Italy	45,590	5.3
5	United States America	41,965	4.8
6	Burundi	35,341	4.1
7	South Africa	33,543	3.9
8	Uganda	32,634	3.8
9	Germany	28,206	3.2
10	France	21,919	2.5
11	Democratic Republic of Congo	19,043	2.2
12	India	17,731	2.0
13	Rwanda	17,676	2.0
14	Zimbabwe	17,099	2.0
15	Canada	16,839	1.9
16	Others	262,668	30.3
	TOTAL	**867,994**	**100.0**

The survey results indicate that about 81 percent of the visitors to Tanzania Mainland came from 15 source markets, with the United Kingdom taking the lead, followed by the United States of America and Italy **(Table 2.3).** The top 15 source markets remained the same as the 2010 survey results, with the exception of Japan which replaced Belgium.

Table 2.3: Top 15 Source Markets to Tanzania Mainland, 2011

S/N	Country of Residence	Number of Visitors	% of Total
1	United Kingdom	1,366	15.8
2	United States of America	1,270	14.7
3	Italy	796	9.2
4	Germany	555	6.4
5	Spain	539	6.2
6	France	440	5.1
7	Canada	366	4.2
8	Australia	358	4.1
9	South Africa	260	3.0
10	Zambia	212	2.5
11	Kenya	209	2.4
12	Netherlands	189	2.2
13	Austria	160	1.9
14	India	144	1.7
15	Japan	135	1.6
16	Others	1,644	19.0
	TOTAL	**8,643**	**100.0**

In the case of Zanzibar, Italy continued to be the main source market as it accounted for 29.2 percent of all the tourists covered by the survey **(Table 2.4).** The dominance of Italy is largely associated with their investments in Zanzibar, particularly in hotels and accommodation. The results are consistent with the increase in the frequency of Italian direct charter flights from nine in 2009 to 14 in 2011. Other important tourist source markets for Zanzibar are the United Kingdom, Spain and Germany.

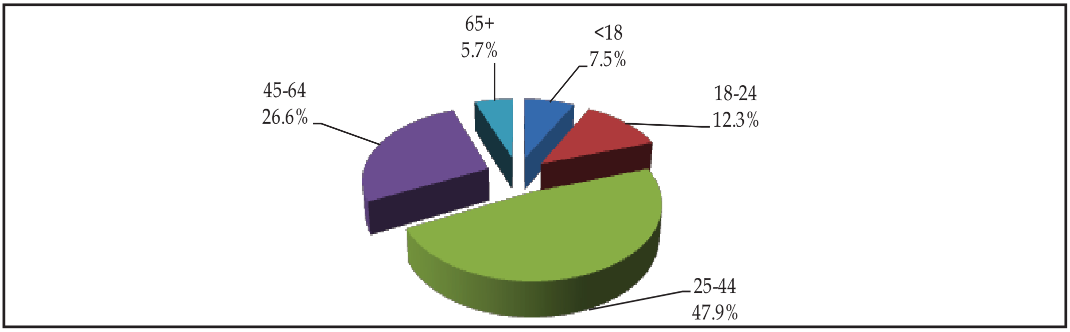
Table 2.4: Top 15 Source Markets to Zanzibar, 2011

S/N	Country of Residence	Number of Visitors	% of Total
1	Italy	1,670	29.2
2	United Kingdom	885	15.5
3	Spain	404	7.1
4	Germany	342	6.0
5	France	324	5.7
6	United States of America	317	5.5
7	South Africa	296	5.2
8	Australia	196	3.4
9	Belgium	133	2.3
10	Netherlands	117	2.0
11	Canada	114	2.0
12	Austria	79	1.4
13	Switzerland	71	1.2
14	Kenya	64	1.1
15	Japan	48	0.8
16	Others	652	11.4
	TOTAL	5,712	100.0

2.3 Age Group

Chart 2.2 reveals that 47.9 percent of the interviewed visitors were in the age group of '25-44', followed by the age group of '45-64', which accounted for 26.6 percent of all the visitors recorded in the survey. The dominance of visitors of the age group of 25-44 is partly associated with the fact that they are more energetic, adventurous and interested in activities such as biking, trekking, nature walk, scuba diving, snookering and night game drive. However, the number of senior citizens remained the smallest. The challenge of attracting this age group which has high disposable income and ample time for travelling still remains.

Chart 2.2: Visitors by Age Group, 2011



2.4 Gender

The survey has recorded 10,983 visitors, out of which 50.4 percent were males and the remaining were females. There has been a fair gender balance between males and females in the previous surveys, with the exception of 2007 **(Table 2.5).**

Table 2.5: Percentage Distribution of Visitors by Gender

	2004	2005	2006	2007	2008	2009	2010	2011
Females	46.2	46.3	49.2	33.6	48.0	50.0	50.7	49.6
Males	53.8	53.7	50.8	66.4	52.0	50.0	49.3	50.4

2.5 Purpose of Visit

The survey results depict that 80.0 percent of the visitors came for leisure and holidays. On the other hand, tourists who came for other purposes like medical, religious and volunteering accounted for 3.0 percent **(Chart 2.3).** The composition of visitors by purpose of visit is almost identical to what was recorded in the past surveys.

Chart 2.3: Purpose of Visit, 2011

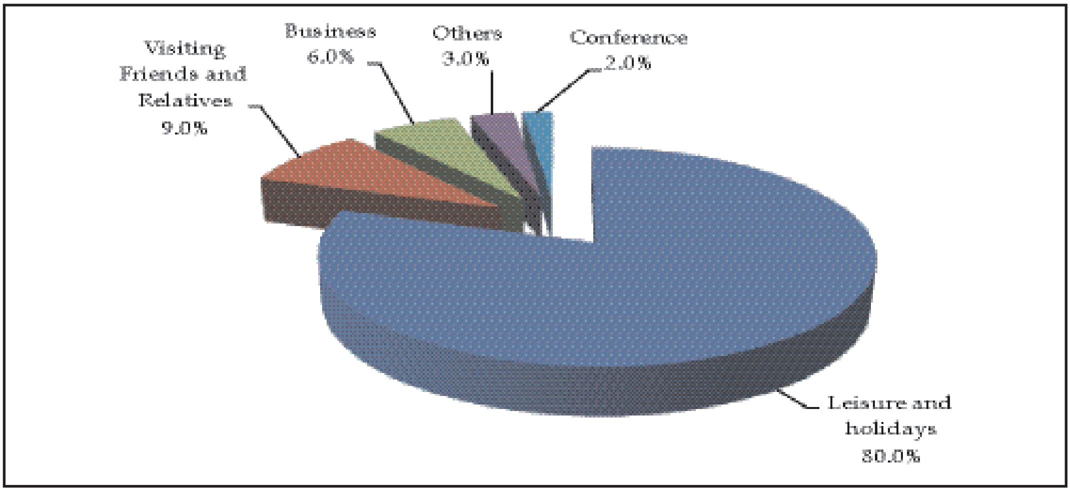
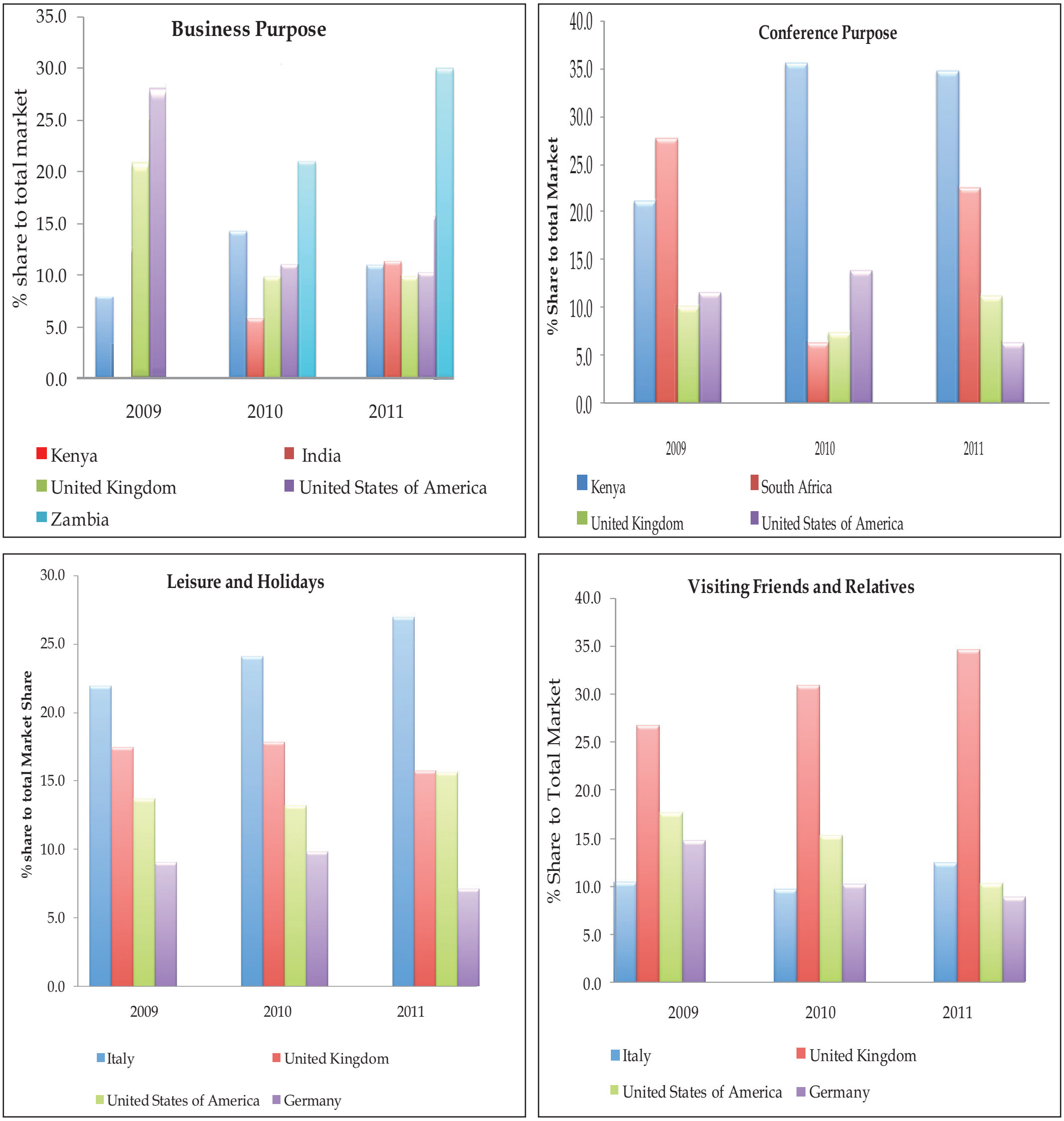


Table 2.6: Percentage Distribution of Top 15 Source Markets by Purpose of Visit

S/N	Top 15 Source Markets	Purpose of Visit				
		Business	Conference	Leisure and Holidays	Visiting Friends and Relatives	Other
1	Italy	2.1	1.7	25.9	12.6	25.9
2	United Kingdom	10.2	11.6	15.2	34.9	15.2
3	United States of America	10.6	6.6	15.1	10.4	15.1
4	Germany	3.2	3.3	7.0	9.0	7.0
5	Spain	0.6	0.8	7.5	2.2	7.5
6	South Africa	9.3	23.1	5.3	3.5	5.3
7	France	3.2	1.7	6.0	3.6	6.0
8	Australia	2.8	0.8	4.7	1.4	4.7
9	Canada	1.7	0.8	3.9	5.0	3.9
10	Kenya	11.3	35.5	1.5	5.4	1.5
11	Zambia	30.4	1.7	0.5	4.7	0.5
12	Netherlands	1.1	1.7	2.5	1.7	2.5
13	Belgium	1.5	0.8	2.3	1.1	2.3
14	Austria	0.4	0.0	2.1	1.0	2.1
15	India	11.7	9.9	0.8	3.6	0.8
	TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Table 2.6 depicts that 56.2 percent of the surveyed visitors came for leisure and holiday and were mainly from Italy, the United Kingdom and United States of America. The same countries also led in bringing most tourists who came to visit friends and relatives. Visitors who came for business were mainly from Zambia, India and Kenya. The highest proportion of conference visitors came from Kenya and South Africa. **Chart 2.4** shows the top four source markets by purpose of visit from 2009 to 2011.

Chart 2.4: Visitors' Market Share by Purpose of Visit, 2009-2011



Region-wise, Europe was the leading source market for the visitors who came for holidays and visiting friends and relatives, followed by America. These regions have been the traditional source markets since the inception of the Survey in 2001. Africa was an important source market for visitors coming for conference and business, largely due to proximity and regional integration initiatives **(Table 2.7).**

Table 2.7: Purpose of Visit by Regions, 2011

S/N	Regions	Visitors' Purpose				
		Business	Conference	Leisure and Holidays	Visiting Friends and Relatives	Other
1	America	12.1	8.0	18.7	15.2	25.3
2	Europe	24.2	20.4	71.9	66.7	61.0
3	Africa	51.9	61.1	7.9	14.0	12.9
4	South Asia	11.9	10.6	1.5	4.1	0.8
TOTAL		**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
All source markets = n		**680**	**192**	**8,801**	**945**	**365**

2.6 Travel Arrangement

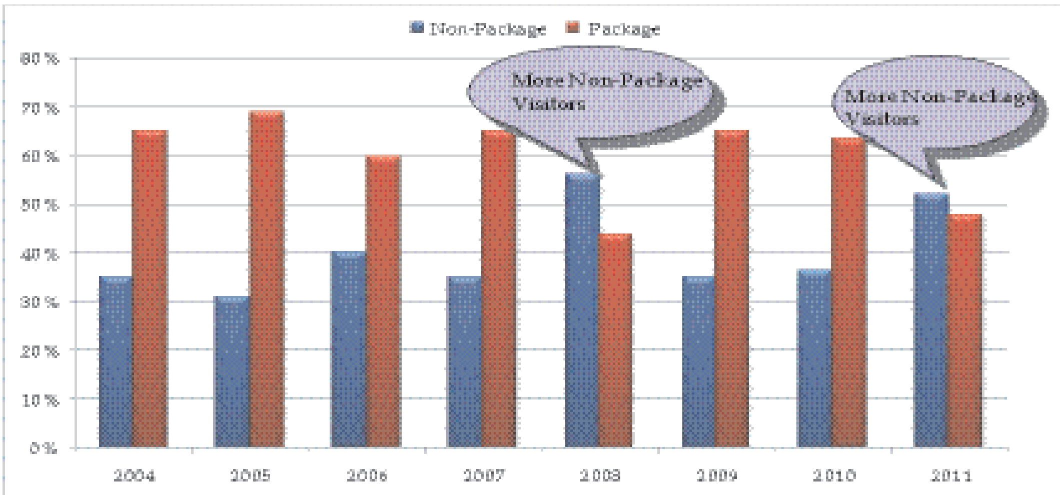
The survey results show that Tanzania received more visitors under the non-package than the package travel arrangement **(Table 2.8).** The dominance of the non-package tour arrangement is not very common, as in most of the previous surveys tourists coming to Tanzania preferred to travel under the package tour arrangement, with the exception of year 2008 **(Chart 2.5).** This phenomenon is partly associated with the sovereign debt crisis in the Euro Zone, which is among the main source markets to Tanzania. It is worth noting that non-package visitors are more resilient to such kind of crisis (UNWTO, World Tourism Barometer, 2009). In addition, the shift in the travel arrangement reflects the increase in number of repeat visitors, as they are already familiar with most of the tourist attractions and related issues like ease of reservation and travel arrangement.

[1] "Repeat visitors" are experienced tourists, who have already made a previous visit to one and the same destination.

Table 2.8: Visitors by Travel Arrangement, 2011

S/N	Country of Residence	Travel Arrangement % of Package	 % of Non-Package	Number of Visitors
1	Italy	12.1	7.0	2,106
2	United Kingdom	4.7	9.1	1,514
3	United States of America	6.5	5.3	1,300
4	Germany	2.7	3.0	632
5	Spain	3.3	2.1	593
6	South Africa	2.4	2.2	506
7	France	2.9	1.7	503
8	Australia	1.9	1.6	388
9	Canada	1.5	1.9	373
10	Kenya	0.4	2.0	264
11	Zambia	0.2	1.8	221
12	Netherlands	1.0	0.9	209
13	Belgium	1.3	0.4	188
14	Austria	1.1	0.4	170
15	India	0.1	1.3	152
16	Others	5.7	11.2	1,864
	TOTAL	**48.0**	**52.0**	**10,983**

Chart 2.5: Distribution of Visitors by Travel Arrangement: 2004-2011



The majority of visitors who came under leisure and holidays preferred the package tour arrangement. Similar to the previous surveys, those who came for business, conference and visiting friends and relatives used the non-package tour arrangement **(Table 2.9).**

Table 2.9: Proportion of Visitors by Travel Arrangement and Purpose of Visit

	Purpose of Visit (Percent)				
	Business	Conference	Leisure and Holidays	VFR	Other
Package Tour	5.9	7.3	57.5	9.7	18.6
Non-Package Tour	94.1	92.7	42.5	90.3	81.4
% of Total Visitor	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Table 2.10 indicates that visitors who came for business purposes under the package tour arrangement were mostly from the United States of America, Zambia and Belgium. The majority of visitors who came for conference were from the United Kingdom and Kenya, while those under leisure and holidays were mainly from Italy, the United Kingdom and the United States of America.

Table 2.10: Visitors under the Package Tour Arrangement by Purpose of Visit, 2011

S/N	Top 15 Source Markets	Visitors' Purpose (Percent)				
		Business	Conference	Leisure and Holidays	VFR	Other
1	Italy	12.5	0.0	28.7	48.6	17.2
2	United Kingdom	12.5	37.5	10.7	18.1	22.4
3	United States of America	16.7	0.0	15.6	0.0	20.7
4	Germany	0.0	0.0	6.6	4.2	5.2
5	Spain	0.0	0.0	8.0	4.2	6.9
6	South Africa	8.3	0.0	5.9	2.8	0.0
7	France	0.0	0.0	6.8	6.9	8.6
8	Australia	0.0	12.5	4.6	1.4	0.0
9	Canada	0.0	0.0	3.6	1.4	8.6
10	Kenya	8.3	37.5	0.7	4.2	5.2
11	Zambia	16.7	12.5	0.2	5.6	0.0
12	Netherlands	0.0	0.0	2.5	0.0	0.0
13	Belgium	16.7	0.0	3.1	0.0	0.0
14	Austria	0.0	0.0	2.6	2.8	5.2
15	India	8.3	0.0	0.3	0.0	0.0
	TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Under the non-package tour arrangement, the majority of business visitors came from Zambia and India, while the conference category was dominated by visitors from Kenya, followed by those from South Africa. Meanwhile, the majority of visitors who came for leisure and holidays were from the United Kingdom, the United States of America and Italy **(Table 2.11).**

Table 2.11: Visitors under the Non-package Tour Arrangement by Purpose of Visit, 2011

S/N	Top 15 Source Markets	Visitors' Purpose (Percent)				
		Business	Conference	Leisure and Holidays	Visiting Friends and Relatives	Other
1	Italy	1.6	1.8	21.7	8.8	19.5
2	United Kingdom	10.1	9.7	21.8	37.5	19.5
3	United States of America	10.3	7.1	14.3	9.7	14.5
4	Germany	3.4	3.5	7.6	9.7	7.5
5	Spain	0.7	0.9	6.7	2.0	3.3
6	South Africa	9.4	24.8	4.4	3.6	4.1
7	France	3.4	1.8	4.7	3.3	2.5
8	Australia	2.9	0.0	4.7	1.4	5.8
9	Canada	1.8	0.9	4.4	5.5	10.8
10	Kenya	11.4	35.4	2.7	5.7	5.8
11	Zambia	31.1	0.9	0.8	4.7	2.9
12	Netherlands	1.1	1.8	2.4	1.9	2.1
13	Belgium	0.7	0.9	1.1	1.3	0.0
14	Austria	0.4	0.0	1.3	0.8	0.8
15	India	11.9	10.6	1.5	4.1	0.8
	TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

2.7 Travel Party

Table 2.12 reveals that visitors who travelled with spouse took the lead followed by those who travelled alone. The majority of those who travelled with their spouses were of the age groups between 25-44 and 45-64 years. Those who travelled alone were mainly of the age group 25-44 years.

Table 2.12: Visitors by Travel Party, 2011

Travel Party	Age Group					
	<18	18-24	25-44	45-64	65+	Total
Alone	24	465	1,628	733	153	3,003
With Children	0	46	252	306	35	639
With Other Friends and Relatives	63	372	910	428	63	1,836
With Spouse	0	242	2,194	1,127	366	3,929
With Spouse and Children	0	94	624	819	39	1,576

2.8 Departure Points

The survey results indicate that about 79.0 percent of the visitors departed by air, as most of them were from the long haul destination **(Table 2.13).** Given the large number of visitors departing by air, there is a need for proper maintenance and upgrading of airport facilities.

Table 2.13: Distribution of Visitors by Departure Points, 2011

S/N	Departure Points	Total	Percent
1	JNIA	4,128	37.6
2	AAKIA	2,766	25.2
3	KIA	1,793	16.3
4	NAM	1,647	15.0
5	TUN	405	3.7
6	KAS	244	2.2
	TOTAL	**10,983**	**100.0**

Table 2.14 shows that all departure points with the exception of Tunduma, recorded the highest number of visitors who came for leisure and holidays. The largest share of business visitors departed through Tunduma and the majority were from Zambia. This is largely attributed to the geographical location of Zambia, which is served by the Dar es Salaam port.

Table 2.14: Distribution of Visitors by Purpose and Departure Points, 2011

Visitors' Purposes	Departure Points (Percent)					
	JNIA	AAKIA	KIA	NAM	TUN	KAS
Leisure and Holidays	65.0	95.2	90.0	92.9	25.9	95.9
VFR	16.5	2.5	3.1	4.1	16.8	1.2
Business	10.4	0.5	1.2	0.3	51.4	0.8
Conference	3.7	0.4	0.9	0.4	0.5	1.2
Other	4.3	1.4	4.7	2.4	5.4	0.8
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

2.9 Length of Stay

The overall average length of stay of visitors was 10 nights, a decrease of one night compared to 2009 and 2010 surveys. Under the non-package tour arrangement, visitors from Germany, stayed longer, followed by those from the United Kingdom, Spain and Belgium. On the other hand, under the package tour arrangement, visitors from France and the Netherlands stayed the longest with an average of 12 nights **(Table 2.15).** It is worth noting that visitors from Europe stayed the longest partly on account of long haul destination. However, if the ongoing Euro Zone crisis persists, it might have a negative impact on the number of visitors and the length of stay. Meanwhile, the average length of stay for visitors to Tanzania Mainland was nine nights for the top 15 source markets, while that of Zanzibar was six nights. Furthermore, visitors who stayed longer came to visit friends and relatives, followed by leisure and holiday makers. The same observation was seen in the previous surveys **(Appendix A: Tables A2, A3** and **A4).**

Table 2.15: Average Length of Stay of Visitors to Tanzania, 2011

S/N	Country	Travel Arrangement		Average
		Non-Package	Package	
1	Italy	12	10	11
2	United Kingdom	13	11	12
3	United States of America	10	10	10
4	Germany	14	11	13
5	Spain	13	10	12
6	South Africa	8	7	8
7	France	12	12	12
8	Australia	9	10	10
9	Canada	12	10	11
10	Kenya	5	6	5
11	Zambia	5	6	6
12	Nertherlands	12	12	12
13	Belgium	13	11	12
14	Austria	12	10	11
15	India	7	9	8
	Average	**10**	**10**	**10**

2.10 Tourism Activities in Tanzania

Tanzania is endowed with a variety of tourism assets, including Seven World Heritage sites, numerous national parks and game reserves, beach resorts, coral reefs and spectacular mountain scenic views. The survey's results show that wildlife tourism is the main activity for visitors to Tanzania **(Table 2.16).** These results are in line with the country's wildlife endowment. It should be noted that the Northern Circuit is the principal destination for wildlife viewing safaris for most of the visitors to Tanzania. In order to enhance conservation of wildlife resources in the Northern Circuit, the Government is required to put more effort on developing the Southern Circuit, including the Selous Game Reserve, which is amongst the world's largest game reserves. It is worth noting that, in 2009, Tanzania was rated by UNESCO as the third wildlife tourism destination in Africa, after South Africa and Kenya.

Table 2.16: Primary Tourism Activities by Country of Residence, 2011

S/N	Country of Residence	Tourism Activities (Percent)							
		Wildlife Tourism	Beach Tourism	Bird Watching	Mountain climbing	Conference Tourism	Cultural Tourism	Hunting Tourism	Others Activity
1	Italy	9.1	35.1	2.1	2.6	2.3	22.1	15.4	3.4
2	United Kingdom	12.7	12.2	8.5	25.2	6.2	17.2	10.3	13.0
3	United States of America	18.6	3.9	21.3	17.3	5.4	9.3	20.5	10.1
4	Germany	7.1	5.2	8.5	6.5	3.1	8.7	2.6	3.1
5	Spain	8.2	3.8	6.4	3.2	2.3	3.2	2.6	1.6
6	South Africa	2.2	8.3	2.1	0.9	6.2	3.8	0.0	6.7
7	France	5.4	3.5	4.3	3.4	0.8	4.0	10.3	1.6
8	Australia	5.9	1.8	4.3	5.8	0.8	3.4	2.6	1.1
9	Canada	4.7	1.2	2.1	5.9	1.6	2.6	5.1	4.0
10	Kenya	0.8	2.7	2.1	0.9	20.2	2.3	2.6	9.4
11	Netherlands	2.8	1.3	2.1	1.6	2.3	1.9	0.0	2.5
12	Zambia	0.5	2.2	2.1	0.2	3.1	0.9	0.0	15.0
13	Austria	2.6	1.1	2.1	2.5	0.0	0.8	0.0	0.2
14	India	1.4	1.6	10.6	0.6	7.8	0.4	0.0	3.6
15	Belgium	1.4	2.2	6.4	1.2	0.0	1.7	5.1	0.0
	Number of Respondents=	**2,584**	**1,698**	**47**	**814**	**129**	**529**	**39**	**446**

Wonderful Wildlife

Visitors from the United States of America and the United Kingdom were mostly attracted to wildlife tourism. However, efforts are underway to diversify the country tourism products by increasing the number of activities such as mega-events, cultural, sport, marine-based activities and many others which are unique to Tanzania.

Beautiful beaches of Zanzibar

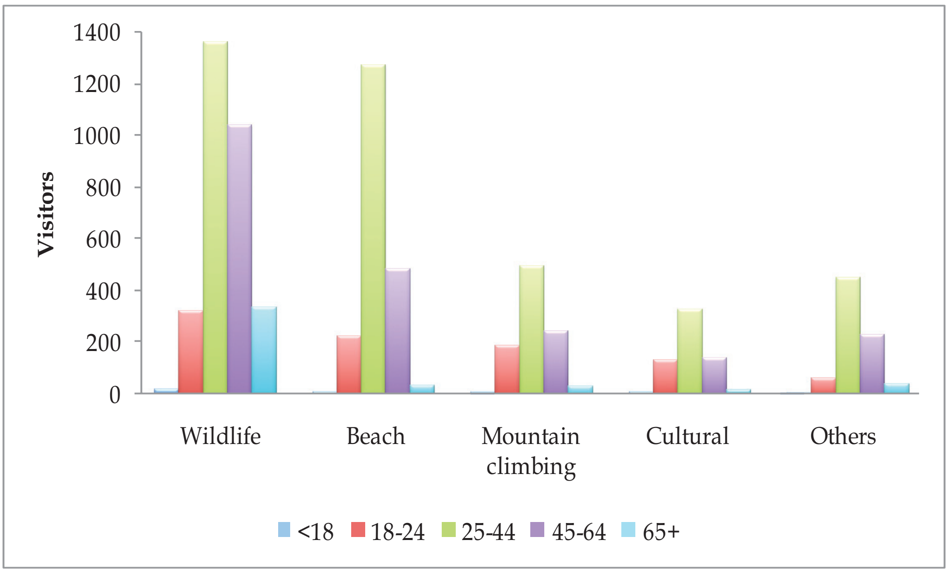
Beach tourism was the second most preferred tourism activity in Tanzania. Visitors who were attracted by the white sandy beaches mainly came from Italy and the United Kingdom. The dominance of Italy and the United Kingdom is consistent with the previous results as both countries continue to be the major tourist source markets for Zanzibar.

Mount. Kilimanjaro

Maasai Dance

Other preferred activity was Mountain Climbing whereby the United Kingdom and the United States of America led in bringing more visitors. Meanwhile, Italy and the United Kingdom were the leading markets in cultural activities.

Chart 2.6: Primary Tourism Activities by Visitors' Age Group, 2011

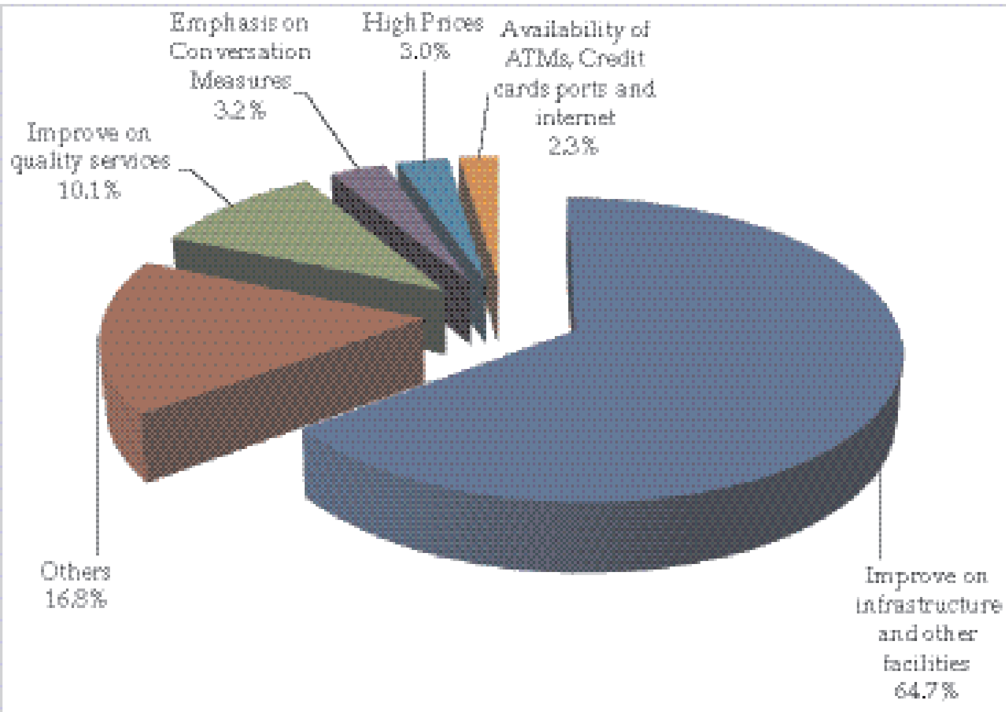


2.11 Areas that Need Improvement

About 65.0 percent of the visitors to Tanzania expressed their concerns on the state of the roads as well as airports and their facilities like washrooms, electricity and water. The second concern was on improvement of quality of services in most of the visited tourist attractions. Other concerns were lack of transparency in pricing, information on the tourist attraction and conservation measures. Visitors also complained about unacceptability of credit cards at most of tourism establishments, unreliability of internet access and inadequate Automated Teller Machines (ATMs).

However, there are efforts which have been done by the Government to address the raised concerns. For instance, the road between Namanga and Arusha has been rehabilitated and the extension of the Abeid Aman Karume International Airport (AAKIA) runway has been completed. Moreover, the construction of the terminal for international passengers at AAKIA is ongoing and expected to be completed in 2013.

Chart 2.7: Areas that Need Improvement , 2011



2.12 Tourism Earnings

Tourism receipts for Tanzania were estimated using the expenditure model whose variables are average expenditure per person per night, average length of stay, proportions of visitors under the package and non-package tour arrangement and the international visitor arrivals (Appendix A). Accordingly, Tanzania earned USD 1,353.2 million in 2011, which is an increase of 8.4 percent from USD 1,254.5 million, obtained in the 2010. Similarly, the model estimated that earnings for Zanzibar amounted to USD 157.1 million, compared to USD 128.5 million recorded in 2010. The increase in tourism earnings is partly explained by the number of international visitor arrivals, which rose by 10.5 percent to 867,994 in 2011 **(Chart 2.8).**

Chart 2.8: Tourism Earnings and International Visitors in Tanzania, 2004-2011

2.13 Average Expenditure

In 2011, the overall average expenditure of a visitor to Tanzania was USD 286 per person per night, which is higher than USD 256 per person per night recorded in 2010. The results further show that visitors who came independently spent an average of USD 247 per person per night and those under the package arrangement spent an average of USD 355 per person per night compared to an average of USD 236 and USD 328, per person per night respectively in 2010. As shown in **Chart 2.9,** the average expenditure per person per night for the non-package visitors has been increasing over time, while that of the package visitors showed mixed trends. The decline in the average expenditure per person per night under the package arrangement in 2008 and 2009 is largely explained by the Global Economic and Financial Crisis. This suggests that independent visitors are more resilient to economic shocks than package visitors.

Chart 2.9: Average Expenditure, 2004-2011

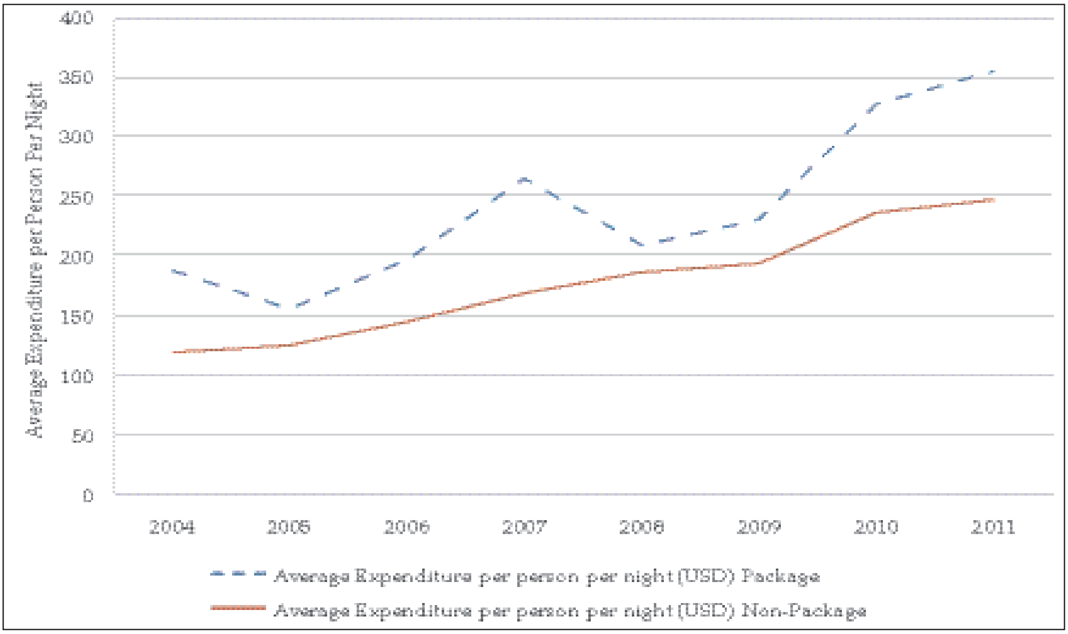


Table 2.17 shows that holidaymakers under the package tour arrangement spent an average of USD 384 per person per night, compared to USD 328 recorded in the 2010 survey. However, the average expenditure of holidaymakers under the non-package tour arrangement dropped to USD 156 per person per night, from USD 192 obtained from the previous survey. Furthermore, under the non-package tour arrangements, business visitors recorded the highest average expenditures of USD 230 per person per night.

Table 2.17: Average Expenditure by Purpose of Visit, 2011

S/N	Purpose of visit	Average Expenditure (USD)	
		Package	Non-package
1	Business	334	230
2	Leisure and Holiday	384	156
3	VFR	312	184
4	Other	296	185

The analysis of average expenditure of the main source markets depicts that visitors who came under the package tour arrangement from America spent the most, followed by those from Austria, Belgium, India and Spain, while Zambians were the least spenders under this travel arrangement. The results further show that, non-package visitors from the United Kingdom spent most on average, while visitors from Spain spent the least **(Table 2.18).** The average expenditure by purpose of visit and travel arrangement is further depicted in **Table 2.19.**

Table 2.18: Average Expenditure for the Top 15 Source Markets, 2011

S/N	Country of Residence	Average Expenditure (USD)	
		Package	Non-Package
1	Italy	257	170
2	United Kingdom	308	190
3	United States of America	383	177
4	Germany	280	131
5	Australia	298	105
6	Spain	311	94
7	France	300	101
8	South Africa	290	144
9	Netherlands	251	104
10	Canada	200	116
11	Kenya	238	150
12	Belgium	332	164
13	Austria	365	132
14	Zambia	135	122
15	India	318	108
	Overall Average	**355**	**247**

Table 2.19: Average Expenditure for Top 15 Source Markets by Purpose of Visit by Travel Arrangement, 2011

S/N	Top 15 Source Markets	Package (USD)					Non-Package (USD)				
		Business	Conference	Leisure and Holidays	VFR	Other	Business	Conference	Leisure and Holidays	VFR	Other
1	Italy	367		185	170	239	133	329	81	65	54
2	United Kingdom	192	323	268	216	92	200	188	99	49	72
3	United States of America	248		347	235	424	201	223	137	73	100
4	Germany			245	191	155	136	130	88	61	205
5	Spain			218	374	310	99	25	97	71	59
6	South Africa	861		272	445		173	65	181	146	182
7	France			243	335	164	94	87	104	55	21
8	Australia			273	161		151		105	71	100
9	Canada			304	19	214	136	350	126	80	132
10	Kenya	210	469	212		63	190	199	178	77	122
11	Zambia	201	15	272	55		184	12	76	76	89
12	Netherlands			201			113	91	108	50	
13	Belgium	421		208			145	287	302	141	
14	Austria			322	455	213	175		111	113	
15	India	224		335			168	209	111	109	49
	Overall Average	**341**	**269**	**260**	**241**	**208**	**153**	**169**	**127**	**82**	**99**

Chapter 3 Conclusion and Recommendations

3.1 Conclusion

This chapter presents the conclusion and recommendations arising from the 2011 International Visitors' Exit Survey. The survey's objectives were to update information on tourist earnings which is useful for compilation of National Accounts and Balance of Payments statistics and gather information for tourism promotion and macro-economic policy formulation. The survey met the intended objectives successfully.

The survey's results reveal that there was an increase in tourist earnings by 8.4 percent to USD 1,353.2 million, compared to USD 1,254.5 million recorded in 2010. Out of this, Zanzibar earned USD 157.1 million, compared to USD 128.5 million recorded in 2010. The number of tourist arrivals to Tanzania increased by 10.9 percent to 867,994 compared to 782,699 recorded in 2010. Likewise, the number of tourist arrivals to Zanzibar increased to 110,649 in 2011 from 91,491 recorded in 2010. Most of these visitors came for leisure and holidays and the majority came from Europe and America.

3.2 Recommendations

- The survey's findings show that Europe and America continued to be the dominant tourist source markets for Tanzania. While efforts are needed to retain the large number of visitors from this part of the world, deliberate initiatives from the Government and the private sector should be taken to attract visitors from other source markets notably Brazil, Russia and China. Such initiatives should include enhanced marketing of Tanzania as a competitive and unique tourists' destination; as well as development of new products other than wildlife, mountain climbing and beaches. Products like cultural, historical and agro tourism need to be developed.

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

- The ongoing Government's efforts to address the existing infrastructural problems in the country are commended. However, challenges still remain on further improvement of JNIA, KIA and airstrips particularly those located in the national parks as well as the roads leading to the tourism attractions.

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

- Enhance availability and accessibility of information materials to tourists at both source markets and entry points. The materials can be in the form of leaflets, guide maps and brief handbooks describing information about places to be visited.

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

- In light of the ongoing competition in the tourism industry, the quality of services has become an important factor in determining the success of the tourism sector. Delivering quality service is one of the key factors in encouraging repeat visits. In view of this, there is a need to improve the quality of services delivered to visitors. This can be attained through designing tailor-made programs, focusing on customer care services at the hospitality institutions.

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

- Visitors also complained about the cleanliness of the environment particularly in the cities, towns, side-roads, streets and national parks. Therefore, there is a need to enforce municipal laws on cleanliness and public awareness about usage of garbage collection facilities such as dustbins placed along the roads.

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

Appendices

Appendix A: Survey Methodology

I. Introduction

The objective of this chapter is to provide a summary of the methodology used in conducting the 2011 International Visitors` Exit Survey. It covers scope and coverage; pre-survey training; data collection and processing and expenditure estimation procedures.

II. Scope of the Survey

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

III. Sample Size

The survey was done on sample basis. It was planned to interview 7,827 departing international visitors, equivalent to one percent of the international visitors recorded in 2010. Ultimately, the survey managed to randomly interview about 6,306 respondents who represented around 10,983 visitors in the sample. This sample was considered sufficient to meet the survey's objectives.

IV. Survey's Coverage

Data collection exercise was undertaken during the tourist peak season which normally runs from July through September. It began from 24th August to 6th September 2011, for two weeks period. The survey covered international visitors departing through six departure points namely, Julius Nyerere International Airport; Kilimanjaro International Airport; Abeid Aman Karume international Airport; Namanga; Tunduma and Kasumulo border points.

V. Enumerators' Manual

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

VI. Training of Enumerators

A one day pre-survey training for enumerators and supervisors was organized, whereby a total of 26 enumerators and seven supervisors were trained. The purpose of the training was mainly to guide the enumerators to understand the questionnaire and equip them with interviewing techniques. Enumerators were also trained in methods of data editing, quality control procedures and fieldwork coordination. The Enumerators' Manual was used as a guideline document during the training.

VII. The Questionnaire

The questionnaire for the 2011 International Visitors` Exit Survey was based on the previous years' questions, with slight modification (Appendix III). The questionnaire had 15 questions which comprised four main parts, namely, visitors' profile, visitors' expenditure patterns and visitors' comments as shown below:

Questions 1 to 5 aimed at establishing visitors' profile (nationality, country of residence, age group; gender and travel party).

Questions 6 to 8 aimed at establishing visitors' preference (purpose of visit, type of tourism activity and type of tour arrangement).

Questions 9 to 14 were structured to establish tourism earnings ascribed to Tanzania. In addition, the questions probed for details on the amount of money spent in Tanzania.

Question 15 seeks information from visitors on the areas that need improvement.

VIII. Data Processing

The processing of the 2011 International Visitors` Exit Survey data began shortly after completion of the fieldwork. Data processing involved editing data from the questionnaires, coding of open-ended questions, data entry and correction of identified errors. Data entry and editing were accomplished using the ORACLE11g database and web-based application.

IX. Estimation of Tourism Earnings

Tourism earnings were estimated using Tourist Expenditure Model that was developed during the comprehensive visitors' exit survey conducted in 2001. The model uses the following variables from the survey:

- proportion of visitor by travel arrangement by purpose of visit,
- average expenditure by travel arrangement by purpose of visit,
- average length of the stay, and
- International visitor arrivals by purpose of visit from the Immigration Department.

The model is depicted in the following equation:

$$E_V = (E_P \times V_P \times T) + (E_{NP} \times V_{NP} \times T)$$

Whereby:

E_V = Total tourist expenditure in Tanzania.

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

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

V_P = Number of arrivals under the **Package** travel arrangement (The arrivals as captured by the Immigration Department, adjusted into package visitors by purpose, using survey results).

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

T = Average length of stay.

The Simplified Model

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

Procedure and assumptions used for the estimation of tourist expenditure for 2011:

- Calculation of the average package tour expenditure involved deduction of estimated cost for international fare to Tanzania and commission accruing to an international tour wholesaler. Information on cost of international transport from source markets was updated using current information gathered from international carriers that bring visitors to Tanzania.

- The average expenditure was computed after removing the outliers from the database. The cut-off points were USD 10 and USD 1,500 per person per night.

- It was assumed that 10 percent of the value of the package is retained by the international tour wholesaler to meet overhead costs and commission. The assumption was based on a study on Tourism Earnings in Tanzania that was conducted in 2000.

- Immigration data on arrivals by purpose of visit were distributed according to the package and non-package arrangements using the travel arrangement ratios as established in the survey.

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

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

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

Appendix B: Questionnaire

THE 2011 INTERNATIONAL VISITORS' EXIT SURVEY

Please read the instructions carefully before filling the form.

INTRODUCTION

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

Your Cooperation is highly appreciated

***FOR OFFICIAL USE*:**

*CODE NUMBER:*____

*NAME OF THE RESEARCHER:*______________________________

*DATE:*_________________ *SIGNATURE:*_____________________

*NAME OF THE DATA ENTRANT:*_____________________________

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

2. What is Your Age Group *(tick one only)*

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

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

Age Group	<18	18-24	25-44	45-64	65+
Number of People					

4. Number of people with whom you are travelling whose expenditure is on one account, including children and yourself

Number of Females	
Number of Males	

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

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

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

Conference [ ]
Business [ ]
Visiting Friends and Relatives [ ]
Leisure and Holidays [ ]
Other (please specify)…………………………… [ ]

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

Wildlife tourism [ ]
Beach tourism [ ]
Cultural tourism [ ]
Bird watching [ ]
Mountain climbing [ ]
Hunting tourism [ ]
Conference tourism [ ]
Others (please specify): ………………………………………………

8. Travel arrangements before coming to Tanzania *(tick one)*

Package tour *(at least international transport and accommodation bought in one price)* [ ]

Non-package tour (independent) [ ] *If "Non-package tour", tick and go to question 12*

9. Items included in your package tour *(tick)*

International transport [ ]
Accommodation [ ]
Food and Drinks [ ]
Internal transportation in Tanzania [ ]
Sightseeing/excursion/game activities [ ]
Guided tour [ ]
Travel Insurance [ ]
Other (please specify)……………………………

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

11. Total number of nights in the package tour INCLUDING nights spent in other countries

12. Number of nights spent in:

Tanzania Mainland	
Zanzibar Islands	

1313.How much money did you spend (cash, travellers cheques, credit cards) in Tanzania during this trip. Please give your best estimate in case you do not remember the exact figures,

Currency [ ]

14. Please give a breakdown of your expenditure in Tanzania on the following;

Accommodation alone		
Hotel	Currency	
Others (Lodges, Motels, Campsites etc.)	Currency	
Food and drinks	Currency	
Internal transportation		
By Air	Currency	
By Road	Currency	
By Water	Currency	
by Railway	Currency	
Rentals (Car hires, Charters, Boats, etc)	Currency	
Cultural Services (Museums, Historical Sites, etc.)	Currency	
Sports and Recreational (Diving, cycling, etc)	Currency	
Sightseeing and Excursion	Currency	
Mountain Climbing	Currency	
Hunting	Currency	
Access/entry/gate fees	Currency	
Visa fees and taxes	Currency	
Shopping (Souvenirs, precious metals, crafts, etc)	Currency	
Others (please specify): …………………………………	Currency	

15. What would you consider the most important areas that need improvement?

……

……

……

Thank you for your cooperation and for choosing Tanzania as your destination. Have a pleasant journey

Appendix C: Statistical Tables

Table C1: Departure Points and Purpose of Visit

		Visitors' Purposes					
S/No	Departure points	Leisure and Holidays	VFR	Business	Conference	Other	Total
1	JNIA	2,685	681	431	154	177	4,128
2	AAKIA	2,633	70	13	10	40	2,766
3	KIA	1,614	56	21	17	85	1,793
4	NAM	1,530	67	5	6	39	1,647
5	TUN	105	68	208	2	22	405
6	KAS	234	3	2	3	2	244
	Total	8,801	945	680	192	365	10,983

Table C2: Average Length of Stay of Visitors to the Tanzania Mainland, 2011

		Travel Arrangement		
S/N	Country of Residence	Non Package	Package	Average
1	United States of America	9	9	9
2	United Kingdom	10	9	10
3	Italy	11	10	11
4	Germany	11	9	10
5	Spain	10	8	9
6	France	10	9	10
7	Canada	11	10	11
8	Australia	8	8	8
9	South Africa	8	7	8
10	Zambia	5	7	6
11	Kenya	5	7	6
12	Netherlands	10	10	10
13	Austria	10	8	9
14	India	7	9	8
15	Japan	9	9	9
	Average	**9**	**9**	**9**

Table C3: Average Length of Stay of Visitors to Zanzibar, 2011

S/N	Country	Travel Arrangement		
		Non - Package	Package	Average
1	Italy	8	8	8
2	United Kingdom	7	6	7
3	Spain	5	5	5
4	Germany	7	8	8
5	France	6	6	6
6	United States of America	4	4	4
7	South Africa	6	6	6
8	Australia	4	4	4
9	Belgium	7	7	7
10	Netherlands	7	6	7
11	Canada	6	4	5
12	Austria	7	6	7
13	Switzerland	6	5	6
14	Kenya	4	5	4
15	Japan	3	3	3
	Average	**6**	**6**	**6**

Table C4: Average Length of Stay by Purpose of Visit

S/N	Country	Purpose of Visit				
		Business	Conference	Leisure and Holidays	VFR	Other
1	Italy	12	7	10	12	16
2	United Kingdom	8	9	12	15	15
3	United States Of America	9	8	10	12	11
4	Germany	7	9	12	17	14
5	Spain	22	4	11	10	17
6	South Africa	6	8	8	8	4
7	France	5	9	12	11	16
8	Australia	8	-	10	12	25
9	Canada	10	3	11	15	16
10	Kenya	4	5	6	8	4
11	Zambia	5	11	6	6	7
12	Netherlands	6	9	12	13	-
13	Belgium	8	3	12	15	-
14	Austria	2	-	11	13	21
15	India	9	5	5	10	10
	Average	**8**	**7**	**10**	**12**	**14**

Table C5: All Source Markets for Tanzania

S/N	Country of Residence	Number of Visitors	% of Total Visitors
1	Italy	2,106	19.2
2	United Kingdom	1,514	13.8
3	United States of America	1,313	12.0
4	Germany	632	5.8
5	Spain	593	5.4
6	South Africa	506	4.6
7	France	503	4.6
8	Australia	388	3.5
9	Canada	373	3.4
10	Kenya	264	2.4
11	Zambia	221	2.0
12	Netherlands	209	1.9
13	Belgium	188	1.7
14	Austria	170	1.5
15	India	152	1.4
16	Japan	143	1.3
17	China	141	1.3
18	Zimbabwe	127	1.2
19	Switzerland	111	1.0
20	United Arab Emirates	77	0.7
21	New Zealand	71	0.6
22	Ireland	65	0.6
23	Uganda	59	0.5
24	Denmark	56	0.5
25	Korea	56	0.5
26	Russia	56	0.5
27	Sweden	55	0.5
28	Portugal	53	0.5
29	Israel	49	0.4
30	United Arab Emirates	49	0.4
31	Norway	43	0.4
32	Czech Republic	43	0.4
33	Poland	38	0.3
34	Finland	34	0.3
35	Rwanda	31	0.3
36	Oman	24	0.2
37	Malawi	24	0.2
38	Greece	21	0.2

S/N	Country of Residence	Number of Visitors	% of Total Visitors
39	Mexico	18	0.2
40	Scotland	17	0.2
41	Turkey	16	0.1
42	Botswana	16	0.1
43	Nigeria	15	0.1
44	Ethiopia	15	0.1
45	Brazil	15	0.1
46	Iran	14	0.1
47	Cyprus	13	0.1
48	Philippines	12	0.1
49	Lebanon	12	0.1
50	Taiwan	11	0.1
51	Singapore	10	0.1
52	Congo	10	0.1
53	Slovenia	10	0.1
54	Mozambique	10	0.1
55	Bulgaria	10	0.1
56	Thailand	9	0.1
57	Namibia	9	0.1
58	Bulgaria	9	0.1
59	Pakistan	9	0.1
60	Kuwait	8	0.1
61	Qatar	8	0.1
62	Saud Arabia	8	0.1
63	Burundi	7	0.1
64	Mauritius	7	0.1
65	Sudan	6	0.1
66	Madagascar	6	0.1
67	Ghana	6	0.1
68	Sri Lanka	6	0.1
69	Hungary	6	0.1
70	Somalia	6	0.1
71	Cameroon	5	0.0
72	Swaziland	5	0.0
73	Luxembourg	5	0.0
74	Croatia	5	0.0
75	Egypt	5	0.0
76	Malt	4	0.0
77	Costa Rica	4	0.0

S/N	Country of Residence	Number of Visitors	% of Total Visitors
78	Argentina	4	0.0
79	Romania	4	0.0
80	Malaysia	3	0.0
81	Panama	3	0.0
82	Seychelles	3	0.0
83	Democratic Republic of Congo	3	0.0
84	Monaco	2	0.0
85	Vietnam	2	0.0
86	Cambodia	2	0.0
87	Chile	2	0.0
88	Tunisia	2	0.0
89	Trinidad Tobacco	2	0.0
90	Benin	2	0.0
91	Sierra Leone	2	0.0
92	Bahrain	2	0.0
93	Algeria	2	0.0
94	Serbia	2	0.0
95	Iceland	2	0.0
96	Mongolia	1	0.0
97	Ukraine	1	0.0
98	Bahamas	1	0.0
99	Gambia	1	0.0
100	Tanzania	1	0.0
101	Estonia	1	0.0
102	Morocco	1	0.0
103	Slovakia	1	0.0
104	Paraguay	1	0.0
105	Guinea	1	0.0
106	Yemen	1	0.0
107	Indonesia	1	0.0
108	Ivory Coast	1	0.0
109	Reunion Island	1	0.0
110	Armenia	-	0.0
	Total	**10,983**	**100.0**

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