THE 2007 TANZANIA TOURISM SECTOR SURVEY

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The 2007 International Visitors' Exit Survey Report

Dar es Salaam, December 2009

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ACRONYMS

ATCL	Air Tanzania Company Limited
BOP	Balance of Payments
BOT	Bank of Tanzania
FDI	Foreign Direct Investment
ILO	International Labour Organisation
JNIA	Julius Nyerere International Airport
KIA	Kilimanjaro International Airport
MDGs	Millennium Development Goals
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
NAM	Namanga
NBS	National Bureau of Statistics
PMO-RALG	Prime Minister's Office- Regional Administration and Local Government
TANAPA	Tanzania National Parks
TIC	Tanzania Investment Centre
TTSS	Tanzania Tourism Sector Survey
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	United Nations World Tourism Organisation
URT	United Republic of Tanzania
VFR	Visiting Friends and Relatives
WHC	World Heritage Centre
ZAA	Zanzibar Airport
ZCT	Zanzibar Commission for Tourism

FOREWORD

Tourism which is one of the leading sectors in Tanzania, has recorded an improved performance in recent years. The number of tourist arrivals has increased from 576,198 in 2003 to 719,031 in 2007. Likewise, earnings from tourism rose from USD 646.5 million in 2003 to USD 1,198.8 million in 2007. The improvement is largely attributable to macroeconomic reforms and increased promotion of Tanzania as a unique tourist destination.

In view of the above, we are delighted to introduce the 2007 Tanzania Tourism Sector Survey (TTSS) Report produced by the multi-institutional committee, which consists of 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). This report is the result of the 5th survey after the maiden one that was conducted in 2001, followed by the 2004, 2005 and 2006 surveys.

The objectives of the survey were to collect an up-to-date tourist expenditure information to be used in the "Tourist Expenditure Model" developed in 2001. The model was developed as a tool for estimating international tourism receipts for compilation of the National Accounts (NA) and Balance of Payments (BOP) statistics. The information obtained from the survey is also used for strategic planning, tourism promotion and macroeconomic policy formulation.

Just like in the previous surveys, the visitors were impressed by the friendliness of Tanzania and the beauty of the country and promised to come back. However, they complained about the state of the infrastructure, in particular the airports and the roads leading to the 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.

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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 2007 International Visitors' Exit Survey. Special gratitude should go to the sponsors of the Project; the Bank of Tanzania (BOT) and the Ministry of Natural Resources and Tourism (MNRT). We would also like to thank the heads of other participating institutions particularly, the National Bureau of Statistics (NBS), the Immigration Department, Zanzibar Commission for Tourism (ZCT) and Tourism Confederation of Tanzania (TCT) for their valuable support and guidance and for allowing their staff to participate in the survey.

Special recognition should also go to the Immigration staff, particularly the Officers In-charge at the Julius Nyerere International Airport (JNIA) in Dar-es-salaam, Zanzibar Airport (ZAA), Kilimanjaro International Airport (KIA), Namanga and Tunduma boarder points. Likewise, our profound thanks should go to field enumerators and data entrants for making the survey a success.

The 2007 International Visitors' Exit Survey Report was prepared under the overall supervision of Ms M. Mmari (Director of Tourism – MNRT) and Dr J. L. Masawe (Director Economic Policy-BOT). The Technical Team was led by I. Mussa (Assistant Director-MNRT) in collaboration with Mrs. G. Mwakibolwa (Deputy Director International Economics Department- BOT). Other members of the team were: P. Mwiru (MNRT), V. Tesha (NBS), T. Mwisomba (NBS), R. Lyatuu (Immigration Department), Mrs. V. Kejo (BOT) and M. Jaffer (ZCT), while F. Shayo and Mrs. S. Sufiani from BOT managed data processing.

EXECUTIVE SUMMARY

Rationale

For nearly a decade, the tourism industry has been one of the major foreign exchange earners in the country. This is largely an outcome of the joint efforts taken by the Government and other stakeholders in supporting the industry and promoting the country as a unique tourist destination. In order to sustain such development, availability of accurate and timely information is important. It is on this basis, that the participating institutions namely, the Bank of Tanzania, the Ministry of Natural Resources and Tourism, National Bureau of Statistics, Immigration Department, Zanzibar Commission for Tourism and the Tourism Confederation of Tanzania have been conducting the International Visitors' Exit Survey since 2001.

One of the recommendations made in the 2001 International Visitors' Exit Survey Report was to carry out shorter surveys on annual basis in order to obtain updated price information. On the other hand, the comprehensive surveys are to be carried out after every five years to obtain benchmarking information. This report is a result of a comprehensive survey which was conducted from 6th to 26th September 2007 and from 21st May to 10th June, 2008. The two periods of the survey covered both the peak and the low tourist seasons.

The objectives of the Survey

The International Visitors' Exit Survey had the following key objectives:

- To update information on tourist earnings for improving the compilation of National Accounts (NA) and Balance of Payments (BOP) Statistics.
- To set benchmarks for statistics on the tourism industry.
- To gather information for tourism promotion and macroeconomic policy formulation.
- To provide the basis for construction of Tourism Satellite Account.

Survey Management

The Tanzania Tourism Sector Survey (TTSS) is managed and implemented by the Steering and Technical Committees, whose members are drawn from the five participating institutions namely; the Bank of Tanzania (BOT), the Ministry of National Resources and Tourism (MNRT), National Bureau of Statistics (NBS), Immigration Department, the Zanzibar Commission for Tourism (ZCT) and Tourism Confederation of Tanzania (TCT).

Report Structure

This report is divided into five chapters. The first chapter depicts the recent developments in the Tourism Industry, both at global and national perspective. The survey methodology is presented in chapter two, while the analysis of the survey results is in chapter three. Chapter four provides conclusion and recommendations.

Main Findings of the Survey

In the 2007, a total of 11,836 respondents were interviewed, representing 19,882 visitors.

Tanzania Earned USD 1,198,764,519 from Tourism Activities in 2007

Using the expenditure model with updated information on average expenditure per person per night, length of stay as obtained during the survey and the number of arrivals as recorded by the Immigration Department, the model estimates that Tanzania received USD 1,198,764,519 from tourism activities in 2007, out of which Zanzibar's estimated earnings were USD 164,452,598. These earnings accrued from 719,031 visitors who toured Tanzania in 2007, out of which 100,221 visited Zanzibar.

Average Expenditure

The overall average expenditure for visitors who came for holidays under package tour was USD 265 per person per night, whereas for non package it was USD 169 per person per night. The high cost of package trips is largely due to the scarcity of high quality of accommodation facilities, where such visitors prefer to stay.

Length of Stay

The overall average length of stay for the visitors to the United Republic of Tanzania was 12 nights. The same results were obtained in the 2004, 2005 and 2006 surveys, whereas for 2001, the average length of stay was 11 nights. The average length of stay within Tanzania mainland was 10 and Zanzibar was eight days.

Major Source Markets of Tourists in Tanzania

The following are the top five source markets for 2007:

1. United States of America
2. United Kingdom
3. Germany
4. Italy

5. South Africa

The survey results depict the dominance of the United States and the United Kingdom as major source markets to Tanzania. This is largely a result of enhanced promotional efforts in the two countries. Meanwhile, Italy continues to be the major tourist source market for Zanzibar, following the existence of Italian accommodation investments and direct flights from Italy. The same pattern has also been observed during the previous surveys.

The Majority of Visitors were of '25–44' Age Group

More than half (55 percent) of the interviewed visitors were in the age group of '25-44'; followed by the age group of '45-64', which accounted for 27.1 percent of all the visitors recorded in the survey. Senior citizens (65 years and above) who have high disposable income and ample time for leisure accounted for only 7.5 percent of the total visitors. Promoting tourism for this potential market segment is one of the challenges of the tourism industry.

Visitors Preferred Travelling with Spouse

The majority of the visitors (about 40.0 percent) travelled with spouses. This is different from the results obtained in 2001 which showed that those who travelled with friends and relatives took the lead. The second group in prominence were those who travelled with friends and relatives (29.0 percent) and those who travelled alone accounted for about 25.0 percent of total visitors.

The Majority of the Visitors Came Under Package Arrangement

The visitors who travelled on the 'package' arrangement were the majority as they accounted for 65 percent, whereas the 'non-package' visitors accounted for 35 percent. The dominance of the package visitors over the non-package has been observed in all the surveys, implying that tourists coming to Tanzania prefer travelling under package arrangement. It is worth noting that visitors prefer to travel under package tour because of ease in making reservations, convenience and safety.

Tour Companies Responsible for Visit Arrangements

OAT and Kuoni were the main foreign tour companies that were responsible for organizing the package tour trips to Tanzania while, Leopard Tours and Ranger Safari were the leading domestic companies in arranging visits in Tanzania.

Visitors to Tanzania Primarily Came for 'Leisure and Holidays' Purposes.

Most of the visitors (about 84.0 percent) came for leisure and holidays, 5.4 percent visited friends and relatives, while 4.5 percent were on business. Since the inception of the Survey in 2001, the number of visitors who came for business purposes has remained below 6.0 percent of the total visitors interviewed. This is partly due to the fact that Tanzania does not currently have a convention centre to accommodate a big number of delegates. The largest conference centre, the AICC can only accommodate 1,000 delegates.

Serengeti, Ngorongoro and Zanzibar were the Main TouristAttractions

The most visited places were: Serengeti (21.3 percent), Ngorongoro (19.5 percent) and Zanzibar (16.6 percent). Visitors from the United States, United Kingdom and Italy took the lead in visiting the main tourist attractions.

The Majority of the Visitors who Travelled to Tanzania Used Air Transport

Most of the visitors (about 79.0 percent) used air transport. This is largely because most of the visitors to Tanzania are from long haul destination. The second widely used mode of transport was road (about 20.0 percent), mainly through Namanga border point.

Most Visitors Were Impressed by Tourist Attractions and the Friendliness of the People of Tanzania

Just like in the previous surveys, the majority of the visitors (98.0 percent) were impressed by the friendliness of the people and the wonderful scenery of the country, and they promised to come back. However, they still recommended an improvement in the infrastructure, particularly the roads leading to tourist attractions like Serengeti and Tarangire; provision of facilities such as water and electricity in parks, camps and streets; upgrading the airport facilities; wider usage of credit card facilities and customer services.

Conclusion

This report concludes the comprehensive International Visitors' Exit Survey that was conducted for three weeks in September 2007 and May 2008. The survey has successfully collected data and information that meet the intended objectives. Through the survey, tourism earnings have been estimated using the updated information. In addition, useful information for tourism promotion has been gathered.

Recommendations

Based on the survey results, the following recommendations are given in order to enhance the development of the tourism industry in Tanzania:

1. Given that the majority of the visitors who come to Tanzania use air transport, there is a need of improving the airports. Both, the Zanzibar International Airport and the Julius Nyerere International Airport need to be upgraded and properly maintained.
2. In order to prolong the length of stay and increase tourism earnings at the destination, efforts should be made to diversify tourist products from heavy reliance on wildlife tourism, to other products like eco-tourism, cultural and conference. Moreover, urban tourism in Dar es Salaam city and Bagamoyo should be developed.
3. Visitors were concerned about limited acceptance of credit cards at the tourism establishments and inadequate number of ATMs. It is therefore important to ensure that the payment methods are improved by enhancing the acceptance of credit cards as well as availability of ATMs.
4. Foreign based travel agents and operators continue to dominate in organising tourist visits to Tanzania. It is important for the Tanzania Tourist Board to liaise with these companies in promoting tourism in the country. This is also a challenge for the local tour companies to upgrade their operations in order to penetrate into the tourist source markets.
5. In order to mitigate the effects of the global financial crisis on the tourism sector, the following are recommended:
    - There is a need to closely monitor the tourism business trend through compilation and analysis of statistical data, information and consulting with both the Public and Private Sectors,
    - Promote domestic and regional tourism, and target independent travelers who are more resilient at times of crisis. In addition, companies should concentrate on containment of cost and improvement of the quality of the products and services.

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Chapter 1

Recent Developments in the Tourism Industry

1.1 Global Perspective

1.1.1 Tourism Performance

Travel and tourism industry is one of the largest and most dynamic industries in the current global economy. Travel and tourism is human resource intensive and was expected by the end of 2007 to account for 10.3 percent of Gross Domestic Product (GDP). According to the United Nations World Tourism Organisation (UNWTO) "World Tourism Barometer (2008[1])", international tourism arrivals grew by six percent to 898 million in 2007, as compared to 2006.

Both economic and tourism growth were driven by emerging markets and developing economies. While mature markets remain the leading destinations in the world, the faster growth rate of new markets confirms UNWTO's main message of tourism's potential for the developing world.

All the regions registered increases above their long-term average, with the Middle East leading by 13 percent, followed by Asia and the Pacific (10 percent), Africa (8 percent), the Americas (5 percent) and Europe (4 percent).

With an estimated total of 44 million international travellers, Africa maintained its good performance by registering an average of seven percent growth annually since 2000.

According to the ILO study (2001[2]), one job in the core tourism industry creates roughly one and a half additional (indirect) jobs in the tourism related economy. Therefore, the travel and tourism economy creates more than 230 million jobs (directly and indirectly), which represent about eight percent of the global workforce. Women make up between 60 and 70 percent of the labour force and half of the workers are of age 25 or under. The industry is growing worldwide by over four percent per year.

The World Economic Forum recently produced a competitiveness study[3] on tourism and travel. According to the report, most of the new jobs in the developing countries are created

1. Volume 6. No.1, January 2008

2 Human Resources Development, Employment and Globalization in Hotel and Tourism Sector

3 The Travel and Tourism Competitiveness Report 2008

in the tourism industry. Tourism is the major services export for many developing countries and has a big potential for providing competitive advantage for the poor and least developed countries. This makes tourism an ideal sector for addressing employment and development challenges such as gender promotion and youth employment.

However, the sector is also faced with problems related to the high rate of undesired part-time, temporary or casual and seasonal employment, the high and increasing rate of subcontracting and outsourcing, with its potential implications for working conditions. Following these results, mainstreaming of tourism for development is highly recommended, and that developing countries should put more emphasis on the tourism sector for their development.

The growing significance of tourism to the developing countries is closely linked to the role of employment in promoting the Millennium Development Goals (MDG) particularly; employment and poverty reduction (MDG 1), gender and empowerment of women (MDG 3) and the relationship between employment and environmental sustainability (MDG 7).

1.1.2 Effects of the Global Financial Crisis on Tourism

The current global financial crisis, initially referred to in the media as the "credit crunch", began in July 2007 when a loss of confidence by investors in the value of securitized mortgages in the United States resulted into a liquidity crisis that prompted a substantial injection of capital into the financial markets by the United States Federal Reserve, Bank of England and the European Central Bank. In one way or another, international tourism will be affected by this crisis.

The UNWTO World Tourism Barometer (2009[4]) confirms that after a sound start to the year 2008 (January-April), whereby international tourist arrivals worldwide grew at an average of 5.7 percent, growth fell below 2 percent in June, July, and August as the high price of oil and the rising inflation took their toll, and together with recession fears, travel budgets were squeezed. For the first eight months of 2008, growth of the number of arrivals averaged 3.7 percent, while for the year as a whole' it was projected to be at around 2 percent globally.

In short to the medium term, the behaviour of tourists will change as they will opt to spend less on travel. Those tourism and hospitality businesses which can adapt to serve travellers on a tighter budget will do well. A decline in tourists who come under standard tour packages is anticipated and the demand for both low cost and perceived good value products and services is likely to sustain.

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In addition, traffic to closer destinations, including regional and domestic travel is expected to be favoured as compared to long-haul travel. Segments such as repeat visitors, special interest, independent travellers as well as visiting friends and relatives, are expected to be more resilient to the global financial crisis.

1.2 Tanzanian Perspective

Tourist arrivals in Tanzania grew by 11.6 percent to 719,031 in 2007, as compared with 2006, which is the highest growth recorded since 2000. The earnings from the tourism sector are estimated to have grown by 26 percent in 2007. It is estimated by the World Travel and Tourism Council that the tourism industry in Tanzania would directly employ about 300,000 people in 2008. However, since travel and tourism touches all the sectors of the economy, its real impact is even greater. It is estimated that Tanzania's travel and tourism economy indirectly account for about 400,000 jobs.

Employment of Local Communities (Guides and Porters)

The following are significant tourism developments which have taken place in the tourism industry:

1.2.1 Capacity Building and Improvement of the Quality of Service

- Construction of the new National College of Tourism in Dar es salaam commenced in early 2008 and completion is expected towards the end of 2009. The college will be a Centre of Excellency in Culinary art. It is also expected that, the quality of training and services in the industry will be enhanced.

- After conducting the Pilot Hotel Classification in Arusha and Manyara regions, the exercise commenced for Dar es Salaam and Coastal Regions towards the end of February 2009 in order to raise the quality of service to meet international standards.

1.2.2 Tourism Marketing

Tanzania through TTB and the private sector participated in various international trade fairs aimed at marketing tourism products and facilities.

- Tanzania received various destination awards during the tourism fairs in Berlin, South Africa, Spain, China and Abu Dhabi.
- Tanzania succeeded to advertise tourism on CNN America (domestic) from October 2007 to March 2008.
- TTB in collaboration with TANAPA, launched the second CNN campaign in the USA in September 2008. The Travel Agent Tanzania Specialist Program was launched in 2008, and renewed in 2009 as a sensitisation and training initiative for USA operators.

1.2.3 Conferences

- Tanzania hosted the Africa Travel Association Annual Congress (ATA) from 19th to 23rd May 2008 and the Leon Sullivan Summit in June 2008 in Arusha.
- Tanzania will host an international conference on **'African Diaspora Heritage Trail'** and an International celebration to mark the 50 years since the discovery of existence of early human being **(Zinjanthropus boisei) in** the Olduvai Gorge in 2009.

Olduvai Gorge

1.2.4 Promotion of Historical and Cultural Heritage Tourism

i. The United Republic of Tanzania has ratified the following international conventions related to conservation of historical and cultural heritage:

Traditional Dances as Part of Cultural Tourism

- The 1970 United Nations Educational, Scientific and Cultural Organization (UNESCO) Convention on the Means of Prohibiting and Preventing the Illicit import, Export and Transfer of ownership of Cultural Property;
- The 1972 UNESCO Convention Concerning the Protection of the World Cultural and Natural Heritage; and
- The 1954 UNESCO Convention on the Protection of Cultural Property in the Event of Armed Conflict.

ii. Tanzania has joined as a member of the International Centre for the Study and Preservation of Cultural Property (ICCROM) and World Heritage Centre (WHC). Tanzania has been honoured to sit in the Council of International Training Center for Conservation of Cultural Heritage.

iii. Stakeholder consultations are ongoing before Tanzania ratifies the International Convention on Marine (ocean bed) Cultural Heritage.

iv. The Doctor Livingstone Memorial Museum in Ujiji was rehabilitated **in 2008**;

v. The states of Historical ruins of Kilwa Kisiwani and Songo Mnara have been improved and together with the Central Slave Route, the Rock Paintings of Kolo, Kondoa have been listed by UNESCO as the World Heritage Sites;

vi. The Eastern Arc Mountains of Tanzania have been put on the tentative list of the World Heritage Sites pending further verification;

vii. A request has been made to UNESCO to list the Ngorongoro Conservation Area as a mixed world heritage site.

Historical sites in Kilwa and Zanzibar

Chapter 2

Survey Methodology

2.1 Introduction

This chapter describes approach and methodological aspects involved in conducting the 2007 Comprehensive International Visitors` Exit Survey. It covers practical issues related to survey implementation. Mostly, it focuses on designing of the survey instruments, sampling framework and utilization of the tourists' expenditure model.

2.2 Scope of the Survey

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

2.3 Sample Size

The survey's sample was planned to capture about two percent of 644,124 international visitors who were recorded in 2006. This approach yields a sample size of about 12,882 international visitors. In this regard, the survey managed to randomly interview about 11,836 respondents, who represented around 19,882 visitors in the sample. In order to allow comparability across the years, the sample size has remained consistent with the ones used during 2006 International Visitors' Exit Survey. This sample was considered sufficient to meet the survey's objectives.

2.4 Survey Period

The survey was carried out in two periods of three weeks each. The first part of the survey was conducted from 06^{th} to 26^{th} September 2007. Due to limited, time it was not possible to carry out the survey in the low tourist season of 2007. Therefore, the survey of low tourist season took place from 21^{st} May to 10^{th} June, 2008, with the assumption that the period will give a close estimate of statistics for low season of 2007.

2.5 Survey Coverage

In order to obtain the required information from the international visitors, it was important to conduct the survey at the entry/exit boarder points. The survey was conducted in five departure points, namely: Julius Nyerere International Airport (JNIA), Kilimanjaro International Airport (KIA), Zanzibar Airport (ZAA), Namanga (NAM) border and Tunduma. These selected departure points are mostly used by the international visitors to Tanzania.

2.6 Enumerators' Manual

The Technical Committee (TC) prepared the Enumerators' Manual (EM) that was used by the 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. Additionally, the manual provided the description of the questions and data cross checking mechanism.

2.7 Training of Enumerators

The Enumerators' Manual was used as a guideline document during the training. The purpose of the training was to guide the enumerators to understand the questionnaire and equip them with interviewing techniques. Specifically, the training which was conducted by TC members aimed at providing the necessary skills and knowledge for gathering information from the respondents.

2.8 The Questionnaire

The questionnaire used in the survey had 24 questions (**Appendix II**):

Questions 1 to 5 aimed at establishing the visitors' profiles.

Questions 6 to 11 targeted at obtaining the visitors' travel behaviour.

Questions 12 to 16 were structured to establish the tourists' earnings ascribed to Tanzania.

Questions 17 to 20 aimed at establishing the list of tour companies and the visitors' travel pattern.

Questions 21 to 22 were aimed at obtaining primary tourism activities and the attractions visited.

Questions 23 to 24 were aimed at obtaining the visitors' perceptions and areas for improvement.

2.9 Data Processing

The data processing exercise started with manual data editing followed by data entry. The process further involved data cleaning in order to remove outliers from the database. The data was processed using the ORACLE8i Relational Database Management System (RDMS), which was designed to cover all the major information as captured in the questionnaire. The system also provides basic reports as stipulated by the users.

2.10 Tourist Expenditure Estimation

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

The model is depicted in the following equation:

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

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 captured by the Immigration Department, proportionately adjusted into non-package visitors using survey patterns);

T = Average length of stay as computed from the survey.

The Simplified Model

Procedure and assumptions used for the estimation of tourist expenditure for 2007

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 (E_v)
						Package	Non Package	
			Package (V_P)	Non Package (V_{NP})	(T)	(E_P)	(E_{NP})	(E_V)
	Business							
	Holiday							
	VFR							

- Calculation of the average package tour expenditure involved deduction of estimated cost for international fare to Tanzania and commission accruing to a tour wholesaler. Information on the cost of international transport from the source markets was updated using current information gathered from international carriers that bring visitors to Tanzania.
- The average expenditure was computed after removing outliers from the database. The cut-off points were USD 10 and USD 1,500.
- About 10 percent of the value of the package is retained by the wholesaler to meet overhead costs and commission. The assumption was based on a study on Tourism Earnings in Tanzania that was conducted in 2000.
- Immigration data on arrivals by purpose of visit were distributed according to package and non-package arrangements, using the travel arrangement ratios as established in the survey.
- The survey's results and total number of arrivals from the Immigration Department were used in the model in order to estimate annual tourists' expenditure in the country. Given the homogeneity nature of the visitors' characteristic, the information collected during the survey is justifiable to represent the total population.
- The Immigration Department provided a separate number of tourist arrivals for Zanzibar that enabled the estimation of tourist expenditure for Zanzibar.

Chapter 3

Analysis of Survey Results

This chapter analyses tourists' characteristics in relation to source markets, age, gender and purpose of visit for the survey which was conducted in 2007. It is the fifth in series, after the first survey that was conducted in 2001, followed by the 2004, 2005 and 2006 ones.

3.1 Source Markets

Table 3.1(a): Top 15 Source Markets for the United Republic of Tanzania

S/N	Country of Residence	Number of Visitors	% of Total
1	United States Of America	4,482	22.5
2	United Kingdom	3,004	15.1
3	Germany	1,246	6.3
4	Italy	1,184	6.0
5	South Africa	1,175	5.9
6	Canada	927	4.7
7	Netherlands	923	4.6
8	Spain	888	4.5
9	Australia	836	4.2
10	France	712	3.6
11	Zambia	429	2.2
12	Belgium	395	2.0
13	Norway	255	1.3
14	Sweden	254	1.3
15	Switzerland	249	1.3
16	Others	2,923	14.7
	Total	**19,882**	**100.0**

Table 3.1a indicates that a total of 19,882 visitors have been recorded from 127 countries during the survey. The United States of America recorded the highest number of visitors, which accounted for 22.5 percent of total recorded visitors, followed by the United Kingdom and Germany, with 15.1 percent and 6.3 percent, respectively. When compared with the comprehensive survey conducted in 2001, all the top 15 countries remained the same, with the exception of Kenya which has been replaced by Zambia. This development is partly

attributed to the inclusion of Tunduma boarder during this survey. This boarder point is famous for business visitors from Zambia, Malawi and other neighbouring countries. Furthermore, the results continue to reveal the dominance of the American and the European tourist source markets to Tanzania. This is a challenge to Tanzania as the dependency on few markets can cause adverse impact to the host country in the case of catastrophe or economic slowdown in these countries. Therefore, there is a need for diversifying promotional efforts to other new and emerging markets such as the Asian countries.

Table 3.1(b): Top 15 Source Markets for Tanzania Mainland

S/N	Country of Residence	Number of Visitors	% of Total
1	United States Of America	3,147	30.7
2	United Kingdom	1,146	11.2
3	South Africa	640	6.2
4	Germany	596	5.8
5	Netherlands	512	5.0
6	Canada	489	4.8
7	Australia	428	4.2
8	Zambia	383	3.7
9	Spain	330	3.2
10	France	305	3.0
11	Italy	239	2.3
12	Belgium	232	2.3
13	Japan	135	1.3
14	Kenya	124	1.2
15	Norway	124	1.2
16	Others	1,425	13.9
	Total	**10,255**	**100.0**

In the case of Tanzania mainland, the top 15 source markets dominated by about 86 percent of all the visitors. As revealed in Table 3.1(b), the United States of America (30.7 percent) took the lead, followed by the United Kingdom (11.2 percent) and South Africa (6.2 percent). In comparison with the comprehensive survey conducted in 2001, most of the top 15 countries remained the same; with the exception of Zambia and Japan which are new entrants. The appearance of Japan in the top 15 source markets is largely associated with the increase of international cooperation with Tanzania, coupled with the growth of economic activities in the source market, as most of these visitors come into the country for business purposes. It should be noted that South Africa came third after the United States of America and the United Kingdom, following an increase in its investments in the country.

Table 3.1(c): Top 15 Source Markets to Zanzibar

S/N	Country of Residence	Number of Visitors	% of Total
1	Italy	639	23.8
2	United Kingdom	469	17.4
3	South Africa	392	14.6
4	Germany	171	6.4
5	Spain	110	4.1
6	United States of America	106	3.9
7	France	105	3.9
8	Kenya	72	2.7
9	Netherlands	64	2.4
10	Belgium	63	2.3
11	Australia	50	1.9
12	Sweden	45	1.7
13	Canada	42	1.6
14	Portugal	39	1.4
15	Norway	32	1.2
16	Others	291	10.8
	Total	**2,690**	**100.0**

The survey's results indicate that Italy led by 23.8 percent, followed by the United Kingdom which accounted for 17.4 percent, South Africa came out third and accounted for 14.6 percent of all the visitors that were recorded during the survey (Table 3.1c). It is worth noting that, Italy continued to be the most important source market to Zanzibar. The predominance of Italy as the major source market to Zanzibar is largely explained by the existence of the Italian accommodation investments and the arrangement of direct flights from Italy. Statistics reveal that the number of accommodation establishments owned by the Italians increased from 10 in 2001 to 30 in 2007. In addition, the Italians charter flights to Zanzibar, with a capacity of 250 to 300 passengers rose from two to five times per week.

The prominence of the United Kingdom is partly associated with the increased number of British residents, who prefer to come to Zanzibar for wedding ceremonies and honeymoons. In recent years, many resorts and hotels in Zanzibar introduced a discounted package for honeymoon and wedding ceremonies. Likewise, the large number of the South African tourists is partly attributed to the inauguration of a flight known as ONE AIR TIME, which flies twice a week from Johannesburg to Zanzibar since 2008.

3.2 Age Group

Table 3.2: Number of Interviewees by Age Group

Age Group	Number of Interviewees	% of Total
Below 18	60	0.5
18 - 24	1,146	9.7
25 - 44	6,540	55.3
45 - 64	3,206	27.1
Above 65	884	7.5
Total	**11,836**	**100.0**

Table 3.2 reveals that more than half (55 percent) of the interviewed visitors were in the age group of '25-44'; followed by the age group of '45-64', which accounted for 27.1 percent of all the visitors recorded in the survey. It is worth noting that, following the improvement of the questionnaire, the distribution of age group has been enhanced from four to five categories, taking into account the 'aging population' in the main tourist source markets. Given that people in the advanced economies retire late as a result of high life expectancy, the age of senior citizens considered in this survey was 65 and above.

The market segment of senior citizens is important, given the fact that they have ample time for leisure and high disposable income. However, during this survey, senior citizens accounted for only 7.5 percent of all the interviewed visitors. The same results were obtained in the previous surveys. In order to win this group, the government should improve the state of the infrastructure such as the roads and the airports. These developments should go in line with provision of facilities like specialized vehicles, ramps and wheel chairs to cater for this market segment. Moreover, there is a need of formulating programs which are tailored towards tapping this potential market. For example, advertised/advertisement programs should be made available to the travel agents, travel magazines and travel channels. The other age groups mainly use the internet as their basic source of travel information.

Chart 1: Respondents by Country of Residence and Age Group

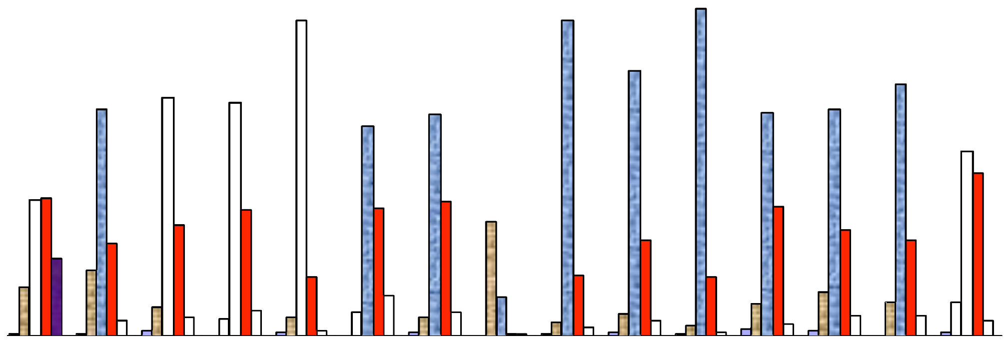


Chart 1 indicates that the majority of the respondents were aged between 18 and 64 (the economically active group), with a combined percentage of about 81.7 percent. Under the age group of '25-44', Zambia took the lead by 81.8 percent, followed by Spain and Italy with the same percentage of about 78.7 percent. Norway, the United States of America and the Netherlands recorded the highest proportion under the age group of '45 – 64', who accounted for 40.8 percent, 34.3 percent and 33.6 percent, respectively. Looking at the senior citizen category, the United States of America and Australia took the lead.

3.3 Gender

Chart 2: Visitors by Gender

The majority of the visitors who were recorded during the survey were males. **Chart 2** depicts that 66.4 percent of total visitors were males, whereas the female visitors accounted for 33.6 percent of total recorded visitors. The results from this survey are different from what was obtained in the 2001 survey and the annual surveys conducted in 2004, 2005 and 2006, which showed a fair balance between male and female visitors (**Chart 3**).

Chart 3: Visitors by Gender from 2001-2007

3.4 Purpose of Visit

Table 3.3: The Number of Visitors by Purpose

Purpose of Visit	% of Total	Number of Visitors
Leisure and Holidays	83.6	16,615
Visiting Friends and Relatives	5.4	1,072
Business	4.5	897
Conference	0.6	117
Other	5.9	1,178
Total	**100.0**	**19,879**

The results obtained from this survey depict the dominance (83.6 percent) of holiday makers, followed by those who visited friends and relatives (5.4 percent), business (4.5 percent) and conference (0.6 percent). Meanwhile, visitors who came for other purposes (like education and medical) accounted for 5.9 percent of all the visitors recorded during the survey.

Just like in the previous surveys, there has been an increase in the number of visitors for most of the categories under purpose of visit, with the exception of those who came for business. It is worth noting that, the questionnaire which was used in the 2007 survey distinguished visitors who came for business from those who came for conference. This was done in order to assess the magnitude of conference as one of the growing tourism products. This information is vital for tourism promotion and investment purposes. For example, construction of a conference facility of an international standard is necessary for attracting visitors who come for conference. Given that the majority of visitors who come to Tanzania are holidaymakers, there is a need of ensuring that their expectations such as, good infrastructure and quality services in the tourism establishments are met.

Table 3.4: Interviewees by Purpose and Age

Purpose of Visit	Age group	% of Total	Number of Interviewees
Business	<18	0.5	2
	18-24	4.8	21
	25-44	65.5	285
	45-64	26.4	115
	65+	2.8	12
Conference	18-24	4.8	5
	25-44	49.0	51
	45-64	43.3	45
	65+	2.9	3
Leisure and Holidays	<18	0.5	45
	18-24	8.5	815
	25-44	55.9	5,356
	45-64	26.7	2,559
	65+	8.4	804
Visiting Friends and Relatives	<18	0.8	6
	18-24	15.9	116
	25-44	49.5	361
	45-64	28.4	207
	65+	5.5	40
Others	<18	1.0	7
	18-24	24.9	168
	25-44	41.0	277
	45-64	29.4	199
	65+	3.7	25

Survey results indicate that the visitors under the age group of '25 – 44' were the majority in all the purposes of visit. The said group accounted for 55.9 percent of total visitors who came for leisure and holidays. Likewise, their prominence was recorded under business and conference as they accounted for 65.5 percent and 49.0 percent, respectively. The age group of '45 to 64' took the lead in conference by recording 43.3 percent of total visitors. It is worth noting that leisure and holidays, which are the main purpose of visitors who come to Tanzania, recorded 26.7 percent of visitors under the age group '45 – 64'. Aggressive marketing campaigns have to be done in order to attract this segment of the market.

3.5 Travel Party

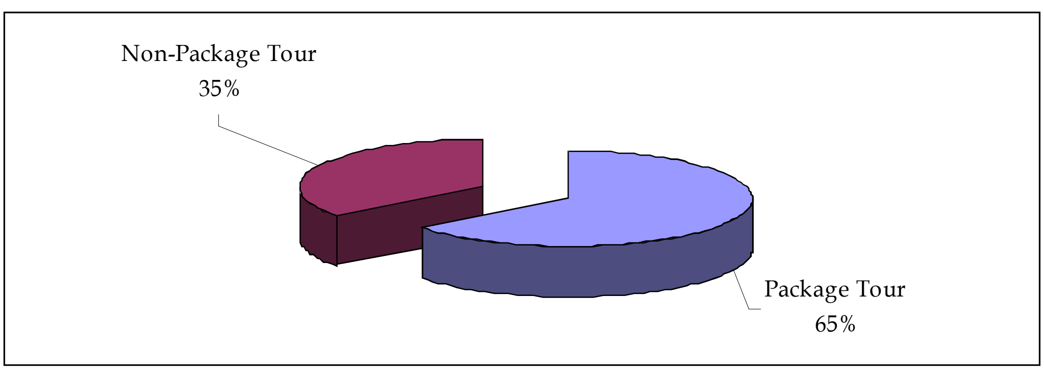
Table 3.5: The Number of Visitors by Travel Party

Travel Party	Number of Visitors	% of Total
With Spouse	7,944	40.04
With other Friends and Relatives	5,668	28.5
Alone	5,055	25.4
With Spouse and Children	759	3.8
With Children	456	2.3
Total	**19,882**	**100**

Survey results in table 3.5 indicate that most of the visitors (40.0 percent) recorded in the survey travelled with spouse. This is different from the 2001 survey results, which showed that those who travelled with friends and relatives were the majority. The second group which was prominent in this survey were those who travelled with friends and relatives (28.5 percent). Just like in the 2001 survey, those who travelled with children were the least, as they accounted for only 2.3 percent of total visitors. This could be partly due to uncertainties associated with long haul destination.

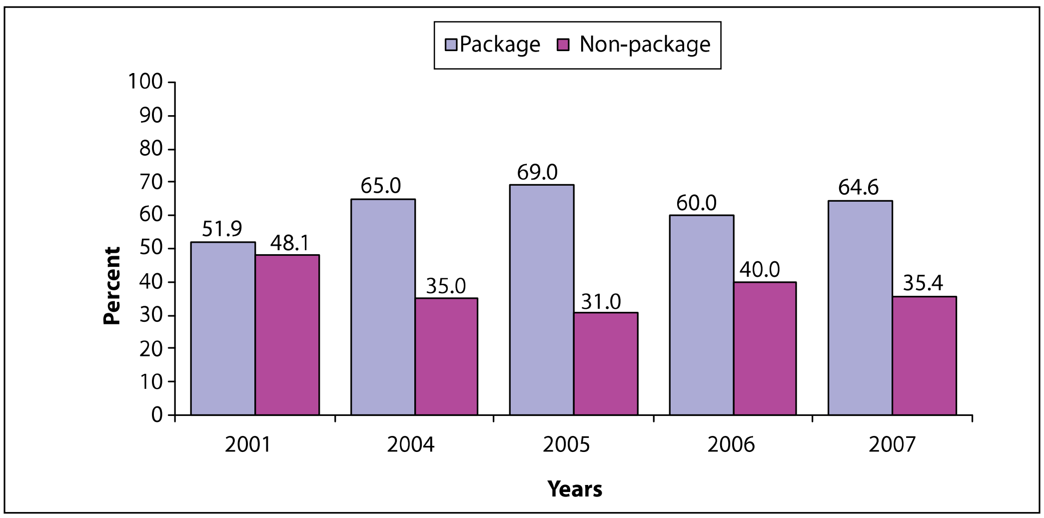
3.6 Travel Arrangement

Chart 4: The Number of Visitors by Travel Arrangement



The survey results show that visitors under the package tour arrangement were the majority as they accounted for about 65 percent. Those on a non-package arrangement (independent) accounted for 35 percent of all the visitors. These results are consistent with the results obtained in the 2001, 2005 and 2006 surveys, which showed that tourists coming to Tanzania prefer travelling under the package arrangement as compared to the non-package arrangement (**Chart 4**). It should be noted with concern that the package arrangement phenomenon is not unique to Tanzania because it is common for long-haul destinations, as it assures the visitors what to expect at the destination. Although most of the payments under the package arrangement are made at source markets, the proceeds are transferred to the destination country for payment of services like accommodation and internal transport, which are consumed by the visitors.

Chart 5: Visitors by Travel Arrangement from 2001 to 2007



3.7 Visitors by Purpose of Visit and Travel Arrangement

Table 3.6: Proportion of Visitors by Purpose of Visit and Travel Arrangement (Percent)

Purpose of Visit	Independent Tour	Package Tour	Total
Business	11.4	0.8	4.5
Conference	1.3	0.2	0.6
Leisure and Holidays	65.3	93.6	83.6
VFR	13.1	1.2	5.4
Other	9.0	4.2	5.9
Total	**100.0**	**100.0**	**100.0**

The majority of the visitors (about 84 percent) came to Tanzania for Leisure and Holiday purposes. This is in consistence with the previous survey reports whereby holidaymakers accounted for more than two-third of the visitors. Business visitors including conference, VFR and other purposes, shared equally the remaining 16 percent (**Table 3.6**). Out of the total visitors, nearly two-third came under package tour arrangement.

Table 3.7: Percentages of Visitors by Travel Arrangement and Purpose

Country	Tour Arrangement	Business	Leisure and Holidays	VFR	Other
Australia	Non-Package Tour	3.1	0.9	2.5	1.1
	Package Tour	0.4	4.4	0.2	0.4
Belgium	Non-Package Tour	0.6	0.4	0.2	0.6
	Package Tour	0.6	2.2	0.0	0.5
Canada	Non-Package Tour	4.3	1.8	4.8	6.3
	Package Tour	0.6	3.0	0.4	10.3
France	Non-Package Tour	2.3	1.0	2.4	1.0
	Package Tour	0.1	3.6	0.0	1.2
Germany	Non-Package Tour	2.4	2.9	7.1	2.5
	Package Tour	0.4	4.9	1.8	1.0
Italy	Non-Package Tour	1.8	0.9	3.7	1.4
	Package Tour	1.3	6.7	1.4	1.0
Netherlands	Non-Package Tour	3.2	1.1	5.0	1.8
	Package Tour	0.4	4.7	0.1	0.4
Norway	Non-Package Tour	1.5	0.7	3.1	1.3
	Package Tour	0.5	0.7	0.8	0.3
South Africa	Non-Package Tour	11.8	1.7	3.8	3.4
	Package Tour	3.3	5.0	0.5	2.7
Spain	Non-Package Tour	0.5	0.6	0.6	0.3
	Package Tour	0.0	5.5	0.0	0.4
Sweden	Non-Package Tour	2.5	0.7	3.0	0.3
	Package Tour	0.1	0.7	0.4	0.0
Switzerland	Non-Package Tour	1.5	0.6	1.5	0.0
	Package Tour	0.0	0.9	0.1	0.0
United Kingdom	Non-Package Tour	9.2	6.9	13.7	6.5
	Package Tour	1.1	11.9	1.4	2.9
USA	Non-Package Tour	11.0	5.2	25.2	18.6
	Package Tour	3.1	19.9	8.4	31.7
Zambia	Non-Package Tour	31.7	0.5	7.8	2.1
	Package Tour	0.5	0.1	0.0	0.1
Total		100.0	100.0	100.0	100.0
	n=	785	14,391	841	942

Table 3.7 depicts the number of visitors who came under the package and non-package tour arrangements by purpose of visit and country of residence. As discussed in the earlier sections, the majority of visitors came into the country for leisure and holidays and under the package tour arrangement. These include countries like USA (19.9 percent), UK (11.9 percent), Italy (6.7 percent) and Spain (5.5 percent). The countries that led in bringing more business visitors included Zambia (31.7 percent), South Africa (11.8 percent), USA (11.0 percent) and the United Kingdom (9.2 percent) who came mostly under non-package tour arrangement. This may partly be explained by the existence of foreign private investments from these countries with the exception of Zambia. The big number of independent visitors from Zambia is largely explained by the fact that there are a lot of businesses between Zambia and Tanzania. Many business people from Zambia purchase goods from Dar es Salaam and transport them by railway or road via Tunduma. For the first time, the survey covered Tunduma which is in the southern part of Tanzania, and boarders Zambia. The existence of the Tanzania - Zambia Railway (TAZARA) line also explains the increase in the number of independent visitors from Zambia.

Overall business visitors' market share has remained low to about 5 percent since 2004. Some notable investments in terms of Trans National Corporations (TNCs) are in the sectors of mining, banking, telecommunications, IT and other specialized services. Potentials for business visitors' growth are high provided that promotional efforts are enhanced by the Tanzania Investment Centre (TIC) to further attract foreign investments from other countries.

Visitors who came to visit friends and relatives were led by the tourists from America (25 percent), the United Kingdom (14.0 percent), Zambia (8.0 percent) and Germany (7.0 percent).

3.8 Reasons for Choosing the Package Arrangement

Chart 6: Reasons for choosing the Package Arrangement

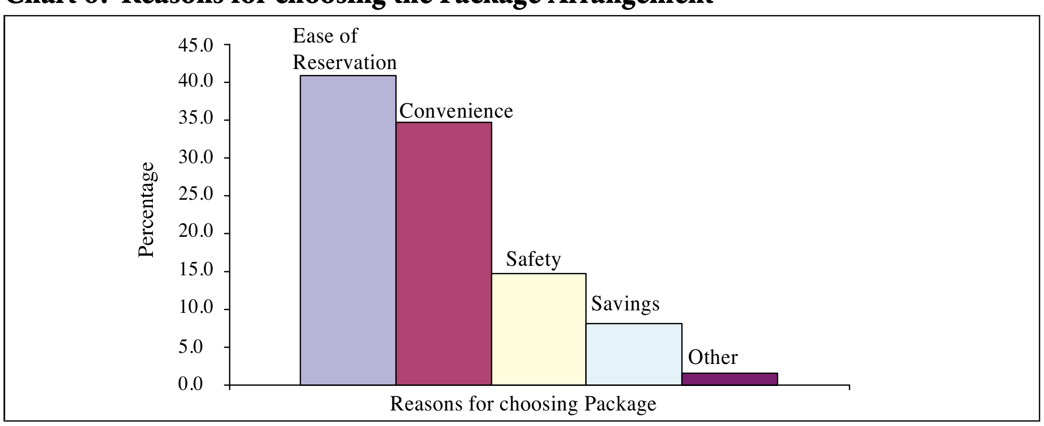


Chart 6 indicates that about 41 percent of the respondents decided to choose the package tour arrangement because of ease in making reservations through the travel agents. Other major reasons for choosing the package arrangement are convenience and safety. The fact that the Tanzanian main tourist source markets namely, the United States and the United Kingdom are long-haul destinations, the package tour arrangement is preferred to the non-package.

Table 3.8: Main Package Item Combination

S/N	International Transport	Accommodation	Food	Internal Transportation	S/ seeing	Guided Tour	Travel Insurance	Total Visitors	Percent of Total Visitors
1	√	√	√	√	√	√	√	2,787	43.8
2	√	√	√	√	√	√	……..	1,349	21.2
3	√	√	√	√	√	……..	……..	332	5.2
4	√	√	√	√	……..	……..	……..	1,681	26.4
5	√	√	√	……..	……..	……..	……..	138	2.2
6	√	√	…	……..	……..	……..	……..	46	0.7
7	……..	√	√	……..	……..	……..	……..	24	0.4

Table 3.8 presents the survey's results for the main items combination of the package tour arrangement. The results show that 43.8 percent of all the visitors under the package arrangement used all the package items combination and was followed by a package combination without travel insurance that accounted for 21.2 percent. The combination, which included international transport, accommodation, food and internal transportation accounted for 26.4 percent. It should be noted that, accommodation is the key item in all the seven combinations. Other important items in the main combinations are international transport and food.

3.9 Tour Companies Responsible for Visit Arrangements

Chart 7: Responsible Tour Companies for Visit Arrangements Abroad

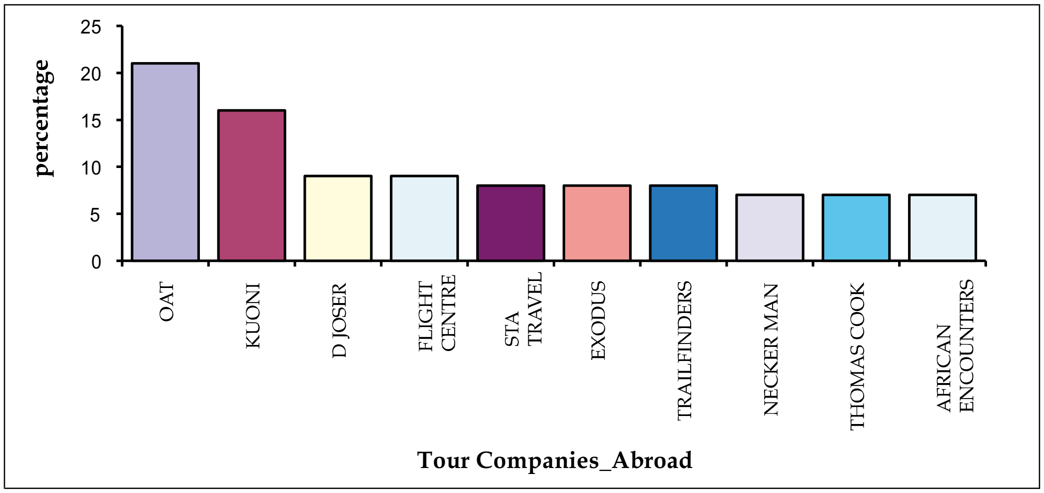
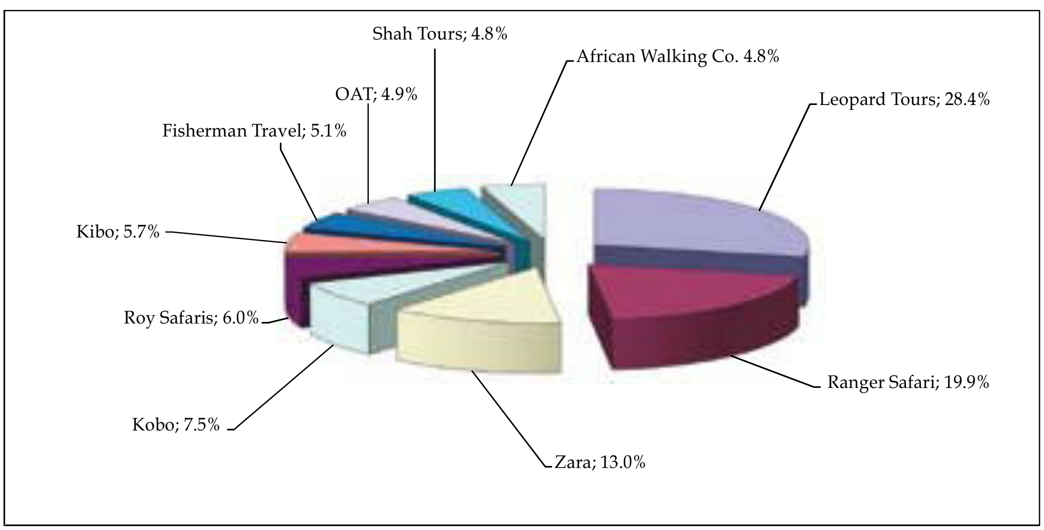


Chart 7 shows the main tour companies abroad which were responsible for organizing the package tour trips to Tanzania. In organising their trips to Tanzania, the results indicate that 21.0 percent and 16.0 percent of visitors who came under the package arrangement used OAT and KUONI, respectively. In order to improve tourism performance, it is important for TTB to liaise with these companies in promoting Tanzania as a unique tourist destination in the world.

Chart 8: Touring Companies in Tanzania



The survey's results reveal that, there were 10 major travel agents/tour operators responsible for arranging the visit in Tanzania. Leopard Tours is the leading company in arranging the visitors' tour in Tanzania; followed by Ranger Safaris, Zara, Kobo and Roy Safaris. The least company to arrange visitors' tour in Tanzania was the African Walking Company.

In this regard, it is important for the government to provide enabling environment such as policies and regulations which will support the local companies. The government should also ensure that these companies follow the existing regulations in order to render services at international standards.

3.10 Length of Stay

Chart 9: Visitors by Night Spent in the United Republic of Tanzania

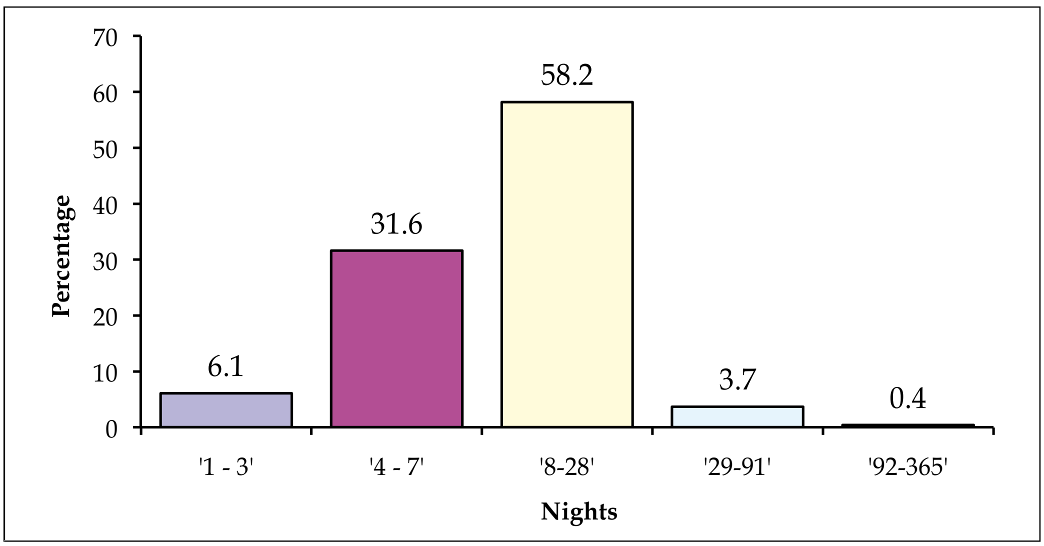


Chart 9 depicts that most of the visitors (89.8 percent) coming to Tanzania from all the source markets recorded during the survey stayed between 4 and 28 nights. Visitors who spent '8-28' nights were the majority and they accounted for 58.2 percent of total visitors. Second in prominence were those who spent '4 - 7'nights and they accounted for 31.6 percent of total visitors. On the other hand, the who stayed for '1 - 3' nights accounted for 6.1 percent, and those who spent 29 nights or more accounted for 4.1 percent. The dominance of the visitors who stayed in Tanzania between '4 - 28' nights was also observed in the previous surveys. In order to prolong the length of stay and increase earnings at destination, it is necessary to diversify tourism products. This should go in tandem with improvement in infrastructure like airports and roads. At the same time, the use of credit cards should be promoted in all the major tourist establishments.

Table 3.9: Average Length of Stay of Visitors to the United Republic of Tanzania

S/N	Country	Non Package Visitors' Country Average	Package Visitor's Country Average	Average
1	United States	14	14	14
2	United Kingdom	14	12	13
3	Germany	14	12	13
4	Italy	12	11	12
5	South Africa	11	10	11
6	Canada	14	12	13
7	Netherlands	13	12	13
8	Spain	12	10	11
9	Australia	13	13	13
10	France	12	12	12
11	Zambia	10	7	9
12	Belgium	11	11	11
13	Norway	12	12	12
14	Sweden	12	12	12
15	Switzerland	12	12	12
	Average	12	11	12

The overall average length of stay for the visitors to the United Republic of Tanzania was 12 nights (**Table 3.9**). The same results were obtained in the 2004, 2005 and 2006 surveys, whereas for 2001, the average length of stay was 11 nights. The above results depict the fact that there is still a challenge of increasing the length of stay of visitors at destination. The 2007 survey results show that visitors from the United States stayed for a longer period (14 nights) followed by the United Kingdom, Germany, Canada, Australia and Netherlands who stayed for 13 nights each. Visitors from Zambia had the least average length of stay of nine nights.

Under the non-package arrangement, the visitors from the United States, the United Kingdom, Germany and Canada recorded the highest average length of stay of 14 nights. The country that stayed the least was Zambia, which recorded 10 nights. As for the package travel arrangement, the United States had the highest average length of stay of 14 nights, followed by the visitors from Australia who stayed for 13 nights. On the other hand, the visitors from Zambia recorded the lowest average length of stay of seven nights. The results depict the fact that the tourism industry in Tanzania, highly relies on the developed countries. In order to mitigate the current negative impact of global economic crisis in countries like the United States, the United Kingdom and Germany, on tourism it is important for the Tanzania Tourist Board to enhance promotion of Tanzania in the Far East countries as a unique tourist destination.

Table 3.10: Average Length of Stay of Visitors to Tanzania Mainland

No	Country	Non-Package Visitors' Country Average	Package Visitors' Country Average	Combined Country Average
1	United States	12	12	12
2	UK	12	11	12
3	South Africa	8	8	8
4	Germany	11	10	10
5	Netherlands	10	10	10
6	Canada	12	11	12
7	Australia	9	11	10
8	Zambia	7	6	7
9	Spain	10	8	9
10	France	10	9	10
11	Italy	10	8	9
12	Belgium	8	10	9
13	Japan	11	6	9
14	Kenya	5	5	5
15	Norway	10	10	10
Overall Average		**10**	**9**	**10**

The survey's results in **Table 3.10** indicate that the overall average length of stay for visitors who toured the mainland was 10 nights. The countries which recorded the highest length of stay of 12 nights were the United States of America, the United Kingdom and Canada. Visitors from Kenya had the lowest overall average length of stay of five nights. The visitors from the United States, the United Kingdom and Canada had the highest average length of stay of 12 nights under the non package arrangement, while Kenya had the lowest average length of stay of five nights. Under the package tour arrangement, the survey's results show that visitors from the United States had the highest average length of stay of 12 nights and those from Zambia and Kenya recorded the lowest average length of stay of six and five nights, respectively.

Table 3.11: Average Length of Stay of Visitors to Zanzibar

No	Country	Non-Package Visitors' Country Average	Package Visitors' Country Average	Average
1	Italy	9	10	9
2	United Kingdom	11	8	10
3	South Africa	7	7	7
4	Germany	10	8	9
5	Spain	7	7	7
6	United State of America	8	8	8
7	France	7	8	8
8	Kenya	6	4	5
9	Netherlands	6	7	7
10	Belgium	6	7	7
11	Australia	8	7	8
12	Sweden	7	6	7
13	Canada	7	5	6
14	Portugal	7	6	7
15	Norway	7	7	7
Overall Average		**6**	**7**	**8**

Table 3.11 depicts that the overall average length of stay for Zanzibar was eight nights. The visitors from the United Kingdom recorded the highest average length of stay of 10 nights, followed by Italy and Germany with nine nights. Meanwhile, Kenya which is close to Zanzibar recorded the lowest overall average of five nights.

Examining the length of stay by travel arrangement, the United Kingdom recorded the highest length of stay of 11 nights under non-package. The visitors from Kenya, Netherlands and Belgium recorded the lowest average length of stay of six nights. Regarding the package tour arrangement, Italy took the lead as it recorded 10 nights, while Kenya recorded the lowest average length of stay of four nights.

3.11 Average Length of Stay by Tour Arrangement and Purpose of Visit

Table 3.12: Average Length of Stay by Tour Arrangement and Purpose of Visit

Country	Tour Arrangement	Business	Leisure and Holidays	VFR	Other	Avg. Total
Australia	Non-Package	6.4	12.1	12	6.7	10.4
	Package	15	12.8	9	9.7	12.5
Belgium	Non-Package	7	11.5	17.5	2.3	10.3
	Package	10	11.7	0	6.3	11.1
Canada	Non-Package	11.8	13.8	13.7	10.3	12.9
	Package	4.8	11.8	10	16.8	11.6
France	Non-Package	8.3	12.5	12.2	5.4	11.2
	Package	6	11.8	0	11	11.6
Germany	Non-Package	10.9	14.4	14.1	10.9	13.5
	Package	10.3	12.5	10.1	10	11.8
Italy	Non-Package	8.4	11.5	12.9	16.5	11.8
	Package	9.8	10.5	9.8	12	10.5
Netherlands	Non-Package	6.1	13.4	12	8.6	11.2
	Package	8.5	12.4	6	12	12
Norway	Non-Package	8.4	11.7	11.9	10.5	10.8
	Package	9.5	12	16	11.3	12
South Africa	Non-Package	7.2	10.7	6.7	5.8	8.4
	Package	7.6	9.6	4.7	8.7	8.6
Spain	Non-Package	5.7	12.6	8	5.5	10.9
	Package	0	10.5		13.7	10.7
Sweden	Non-Package	7.1	12.2	14.7	12.3	11.6
	Package	3	12.1	13	0	11.8
Switzerland	Non-Package	6.8	12.3	12.1	0	11.5
	Package	0	11.9	7	0	11.7
United Kingdom	Non-Package	9.1	14.2	12.2	10.5	12.3
	Package	8	12.5	11.5	12.7	12.1
United States of America	Non-Package	9.9	14.5	13.1	12.7	12.9
	Package	8.8	13.4	9.5	12.1	12
Zambia	Non-Package	8.8	8	7.5	5.9	8
	Package	4.3	7.6	0	12	6.7

Table 3.12 provides the survey's results on the average length of stay for the top 15 source markets by purpose of visit and travel arrangements. On average, survey's results indicate

that the visitors under the non-package arrangement from Belgium, Canada and Italy had a maximum number of about 17 nights spent under the category of VFR and Other purposes. Holiday makers had the same number of nights spent averaging around 12 nights for all the countries except Zambia which recorded eight nights. Business visitors had a relative lower number of nights spent in the country compared to other purposes, except for the visitors from Australia and Germany.

On average, holiday makers spent about 12 nights, business visitors spent about 10 nights while visitors under VFR and other purposes spent 8 nights. The available information from previous International Visitors' Exit Survey Reports showed that, on average, a tourist spent about 11 nights to the URT in 2001 and 12 nights for the consecutive three years period from 2004.

One of the most important variables used in the calculations of the country's tourists' expenditure is the length of stay which is obtained from the survey.

3.12 Mode of Transport

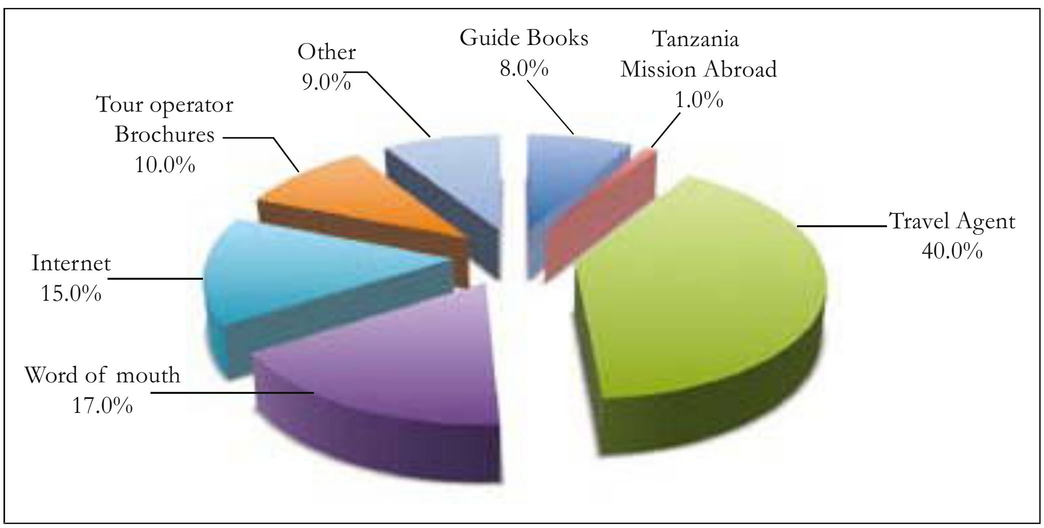
Table 3.13: Distribution of Visitors by Country of Residence and Mode of Transport

	Mode of Transport			
Country	**% of Air**	**% of Rail**	**% of Road**	**% of Water**
Australia	46.8	0.1	52.9	0.2
Belgium	75.2	0.0	24.8	0.0
Canada	78.0	0.3	21.7	0.0
France	81.9	0.3	17.8	0.0
Germany	82.6	0.1	17.3	0.0
Italy	92.7	0.0	7.1	0.2
Netherlands	67.0	0.2	32.8	0.0
Norway	92.2	0.0	7.8	0.0
South Africa	89.4	0.3	10.2	0.0
Spain	70.8	0.0	29.1	0.1
Sweden	84.3	0.0	15.7	0.0
Switzerland	83.9	0.4	15.7	0.0
United Kingdom	83.5	0.5	16.0	0.0
USA	81.9	0.2	17.8	0.2
Zambia	35.2	12.8	52.0	0.0
Average	**79.1**	**0.6**	**20.3**	**0.1**

The majority of the visitors (about 79 percent) who entered Tanzania in 2007/08 used air transport largely because most of the visitors to Tanzania are from long-haul destination. Available statistics from the 2001 Survey show that there is an increase of about 14 percent in the usage of air transport. Given that the majority of tourist who visit Tanzania travel by air, there is a need of having a strong national carrier going to major tourist source markets as well as improving airport facilities. The second important mode of transport was the road, which accounted for about 20 percent. Australia recorded the highest (53 percent) for the visitors who entered Tanzania by road. The same pattern was also observed in the 2001 Survey. Zambia, the new entrant in the 15 source markets, accounted for 52 percent, while Netherlands recorded 32 percent of total visitors who used the road transport. Roads connecting Tanzania and Kenya through Namanga, Sirari, Holili and Horohoro boarders in the northern circuit and Tunduma and Kasumulo roads (in the southern part of Tanzania), which connect Zambia and Malawi were mainly used by the visitors. These are the key road networks for the tourists visiting the country, thus they need to be properly maintained.

3.13 Source of Information

Chart 10: Visitors by Source(s) of Information

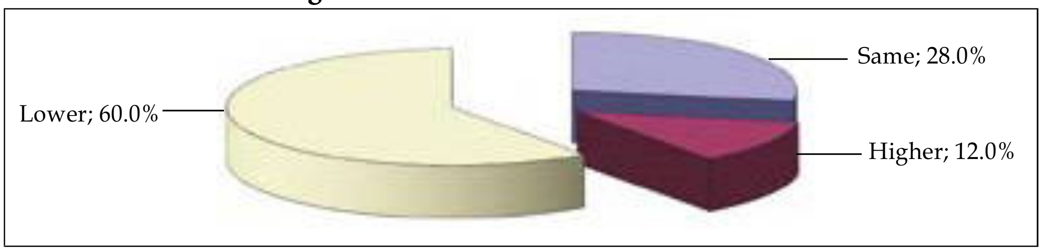


Observation from **chart 10** shows that, travel agents were the major source of information for visitors who came to Tanzania and it accounted for 40.0 percent of total visitors. Other important sources were the Word of Mouth and the Internet, accounting for about 17.0 percent and 15.0 percent, respectively. The Other category which comprises previous visits, television documentaries and foreign embassies based in Tanzania accounted for 8.6 percent.

The survey's results also show that the Tanzania Tourist Board and Zanzibar Commission for Tourism are also the source of information as they accounted for 0.4 percent and 0.3 percent, respectively. The low percent of the two tourism marketing boards as a source of information is largely contributed by the fact that they operate through the travel agents.

3.14 Cost of Touring Tanzania

Chart 11: Cost of Touring Tanzania



The result shows that 60.0 percent of the visitors recorded by the survey indicated that the cost of touring Tanzania is lower compared to other countries of Africa and 28.0 percent of visitors did not find the difference. However, other visitors (12.0 percent) complained that the cost of touring Tanzania is higher compared to other African countries (**Chart 11**).

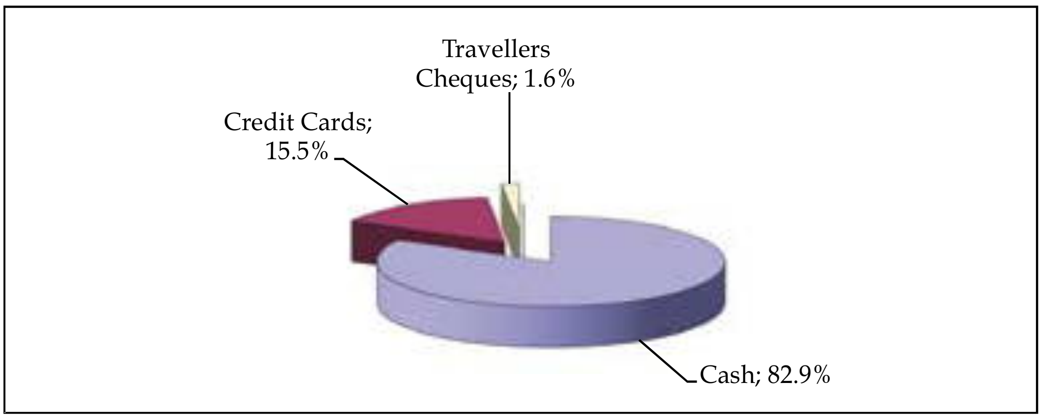
Table 3.14: Cost of Touring Tanzania as Compared to Other Countries of Africa

Country	% Higher	% Lower	% Same	Total
Norway	3.2	77.9	18.9	100.0
Zambia	12.1	73.8	14.0	100.0
Italy	10.7	73.6	15.7	100.0
Belgium	7.9	66.4	25.7	100.0
Germany	16.6	63.7	19.7	100.0
United Kingdom	8.6	63.6	27.7	100.0
Switzerland	18.3	63.3	18.3	100.0
France	20.0	63.1	16.9	100.0
Canada	12.2	59.5	28.3	100.0
Sweden	12.6	54.0	33.3	100.0
United States of America	9.6	53.8	36.7	100.0
Australia	9.7	52.8	37.5	100.0
Netherlands	19.7	49.7	30.6	100.0
Spain	15.1	48.7	36.3	100.0
South Africa	18.8	47.8	33.4	100.0

Table 3.14 reveals that most of the visitors from France (20.0 percent) complained about high cost of touring Tanzania followed by the Netherlands (19.7 percent), South Africa (18.8 percent) and Switzerland (18.3 percent). The majority of visitors from Norway, Zambia, Italy and Belgium indicated that the cost of touring Tanzania is lower compared to other African countries. On the other hand, visitors from Australia, the United States of America, Spain and South Africa did not see the difference between the cost of touring Tanzania and other African countries.

3.15 Modes of Payment

Chart 12: Modes of Payment



The survey's results show that about 83 percent of visitors to Tanzania mainly used cash as the mode of payment, while about 16 percent used credit cards as the mode of payment. These results indicate the fact that the Tanzanian economy is more of cash based, since modern means of electronic transactions (Plastic money) are not commonly used. This is largely due to lack of credit cards facility for most of the tourism establishments and limited distribution of ATM machines in the country (**Chart 12**). In this regards, it is a drawback to the tourism industry, given that moving around with cash is inconvenient and unsafe. It has been noted that during the survey, some of the visitors complained that they wanted to spend more but they could not use their credit cards. This poses a challenge to the government, which has to ensure wider credit card use in the country in this globalization era. Given that the country has more than 30 commercial banks which are the main providers of these facilities including credit card machines and ATMs, sensitization on the importance of electronic payment to the tourism establishments is absolutely necessary.

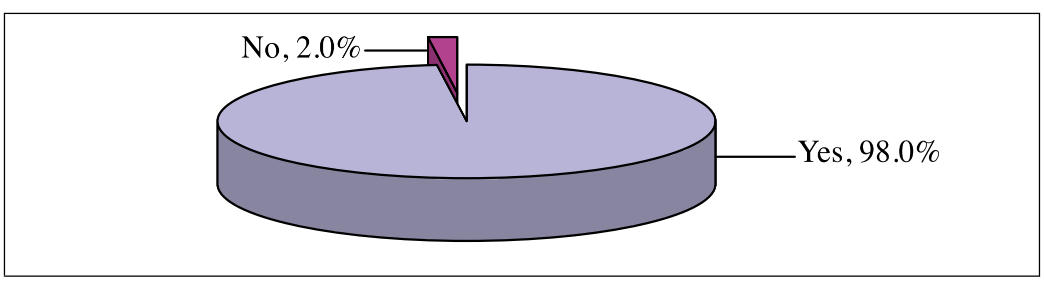
Table 3.15: Modes of Payment by the Top 15 Source Markets

S/N	Country	Cash	Credit Card	Travel Cheque	Others
1	Australia	523	113	9	
2	Belgium	228	48	1	
3	Canada	455	87	12	
4	France	388	83	3	1
5	Germany	625	122	18	
6	Italy	557	92	0	
7	Netherlands	525	88	1	
8	Norway	142	29	0	1
9	South Africa	586	113	11	
10	Spain	417	69	0	1
11	Sweden	140	23	0	
12	Switzerland	152	29	2	
13	United Kingdom	1,673	269	80	2
14	United State of America	2,202	546	35	1
15	Zambia	310	9	0	
	Total	**8,923**	**1720**	**172**	**6**
	% of Total	**82.5**	**15.9**	**1.6**	**0.1**

Table 3.15 summarizes the modes of payment used by visitors from the top 15 source markets to Tanzania. The survey results show that in all the fifteen countries cash was used as the main mode of payment. The countries which led were USA, UK, Germany and South Africa. This situation is partly explained by the fact that in many tourist establishments, availability of credit card facilities is limited. These results also reveal that 15.9 percent of the visitors transact through credit cards, while the minority use traveller's cheques as their means of payment.

3.16 Potential Visits

Chart 13: Inclination to Visiting Tanzania Again



Just like in the survey conducted in 2001, the results show that most of the visitors (98.0 percent) were impressed by the friendliness of the people and the wonderful scenery of the country. They had an excellent experience and indicated that they would like to visit Tanzania again (**Chart 13**). This largely signifies satisfaction and also implies that there is a potential for further growth in the tourism sector, especially if the government and the private sector address the challenges facing the industry.

Chart 14: Visitors by Purpose of Visit and Inclination to Visit Again

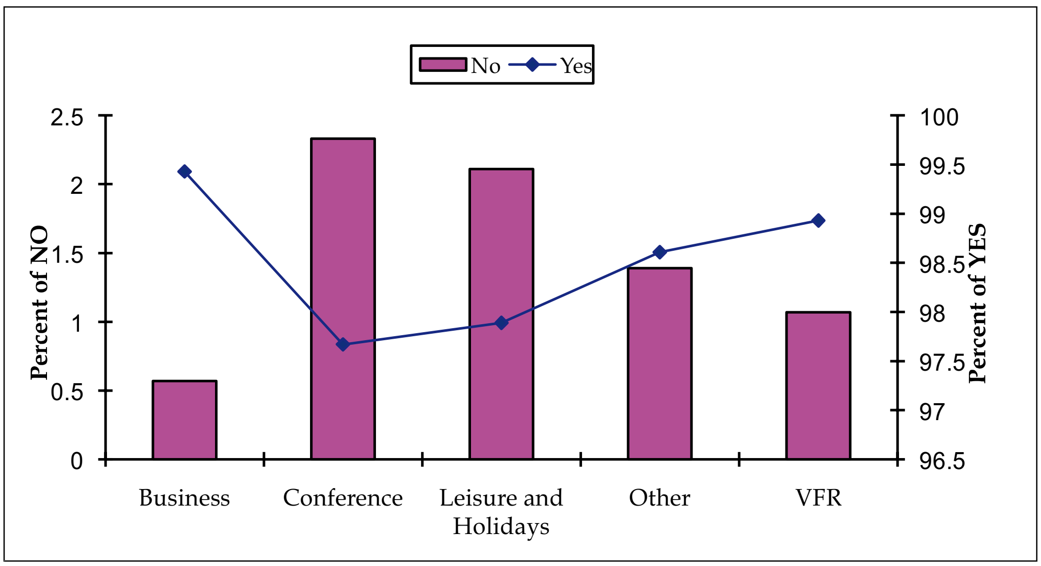


Chart 14 shows that most of the visitors promised to come again, with business visitors (99.4 percent) taking the lead, followed by those Visiting Friends and Relatives (98.9 percent). The high responses towards return visits illustrate high potential the country has in terms of the natural endowments and the beautiful scenery. These results also entail high level of satisfaction on the goods and services offered to the visitors at the destination. It should be noted that the same kind of results were obtained during the maiden survey conducted in 2001. This is impressive because after six years, the majority of the visitors are still promising to come back. However, only a few visitors (2 percent) indicated that they will not come back, particularly those coming for conferences.

3.17 Attractions Visited

Table 3.16: Number of Visitors by Country of Residence and Tourist Attractions

Country	Serengeti	Ngoro ngoro	Zanzibar	Tarangire	Manyara	Mt. Kilima njaro	Arusha Nat. Park	Muse ums	Others[1]
Australia	575	494	227	201	243	91	94	42	56
Belgium	233	192	106	166	112	28	27	29	48
Canada	484	392	335	256	250	152	63	81	117
France	363	269	257	289	243	58	67	23	89
Germany	377	357	494	270	177	231	174	82	236
Italy	194	171	787	214	108	41	39	68	134
Netherlands	589	512	209	313	217	104	100	29	108
Norway	79	86	108	12	25	59	1	26	49
South Africa	292	271	517	77	135	161	65	65	84
Spain	503	463	350	315	334	77	112	24	55
Sweden	68	64	129	53	53	26	4	15	37
Switzerland	94	96	82	72	50	56	40	13	36
UK	1,176	1,065	1,279	548	531	576	251	212	484
USA	2,465	2,416	879	1,389	1,241	543	568	279	602
Zambia	32	41	109	41	13	11	4	10	108
Total	7,524	6,889	5,868	4,216	3,732	2,214	1,609	998	2,243

Note: 1. Others include Amboni Caves, Bagamoyo, Gombe, Mikumi, Selous, Ruaha and Udzungwa

2. Complete table has been attached as Appendix.

Table 3.16 depicts that Serengeti National Park, Ngorongoro Conservation Authority and Zanzibar Island were the most visited tourist attractions. They were followed by Tarangire, Manyara, Mt. Kilimanjaro and Arusha National Parks. Visitors from the United Kingdom, the United States of America and Italy took the lead in visiting these sites, following the increased tourism marketing campaign in these markets. For example, Tanzania's tourist attractions were advertised on the London town buses and at the Heathrow Airport in the United Kingdom. Also, the government of the United Republic of Tanzania launched an ongoing advertising campaign in the United States of America known as "Tanzania, the Land of Kilimanjaro, Zanzibar and Serengeti" which was aired on CNN and published in the *USA Today* newspaper. Visitors from Italy mostly visited Zanzibar. These developments are consistent with the fact that Italy is the leading source market for tourism in Zanzibar. This is partly associated with the existence of numerous Italian tourism establishments on the island. Other countries which were more prominent in the other tourist sites include

Germany, South Africa, the Netherlands and Spain. It should however be noted that some visitors went to more than one attraction.

Wildlife in Tanzania

The survey's results show that, with the exception of Zanzibar, the most visited sites are located in the northern circuit. This is largely due to the fact that the country's marketing strategies are mainly geared towards the promotion of the wildlife especially in the northern circuit, coupled with the availability of better facilities and easy accessibility. On the other hand, there is slow development of the infrastructure in the Southern Circuit, thus impeding diversification of the tourism sector to where Tanzania has enormous tourism potentials.

Zanzibar

It should be noted that, Selous which is in the Southern Circuit, is the largest game reserve in Africa; although its performance in terms of tourists is still low as has been observed in the previous surveys. This calls for concerted efforts to advertise the southern circuit, coupled with infrastructural development of the area to an acceptable standard in order to reap the benefits accruing from tourism activities. The southern circuit offers not only the wildlife, but also a number of heritage sites that would drive the country's tourism to new heights. This poses a challenge to enhance marketing efforts to other parts of the country which offer a variety of tourism products. These include, among others, the Caravan Serai, Kaole and the Olduvai Gorge that is strongly associated with human origins and the Stone Age phase of early life. There are also places like the Amboni Caves in Tanga, the Isimila Stone Age, Ujiji-Kigoma and Kilwa, among other sites.

A Tourist Attraction in the Southern Circuit

3.18 Primary Tourism Activity to Tanzania

Table 3.17: Primary Tourism Activity by Country (Percent)

Country	Wildlife Tourism	Beach Tourism	Mountain Climbing	Cultural Tourism	Other Tourism	Total Visitors
USA	66.5	5.1	7.6	11.1	9.7	2558.0
UK	45.4	20.4	16.4	11.6	6.2	1894.0
Germany	49.7	16.2	16.8	10.7	6.6	690.0
Italy	29.1	53.7	1.7	12.9	2.6	605.0
S.Africa	28.3	31.5	10.8	11.4	18.0	647.0
Canada	54.3	8.0	11.7	15.6	10.4	512.0
Netherlands	72.9	7.0	5.6	8.6	5.9	568.0
Spain	68.6	15.3	4.6	8.4	3.1	452.0
Australia	72.4	6.6	7.3	9.4	4.3	602.0
France	63.4	16.1	6.5	9.2	4.8	415.0
Zambia	15.8	29.3	2.6	36.5	15.8	266.0
Belgium	63.9	17.2	5.5	10.6	2.8	255.0
Norway	32.9	19.1	23.4	12.5	12.1	152.0
Sweden	40.5	26.6	3.8	15.8	13.3	158.0
Switzerland	52.2	17.8	15.3	10.2	4.5	157.0

Table 3.17 shows that wildlife tourism is the major activity in Tanzania. Most of the visitors from Australia, Spain and the United States were involved in wildlife tourism. The prominence of wildlife in the tourism industry in Tanzania calls for diversification of tourism products. There is a need for an aggressive promotion of other forms of tourism like cultural and eco-tourism.

Wildlife Tourism

Beach tourism was the second in importance followed by mountain climbing. Visitors from Italy, South Africa and Zambia were mostly attracted by beach tourism. It should be noted that the dominance of the visitors from Italy and South Africa in beach tourism is consistent with the results on source markets which show that Italy was the leading tourist source market to Zanzibar. Other activities like cultural tourism attracted few visitors.

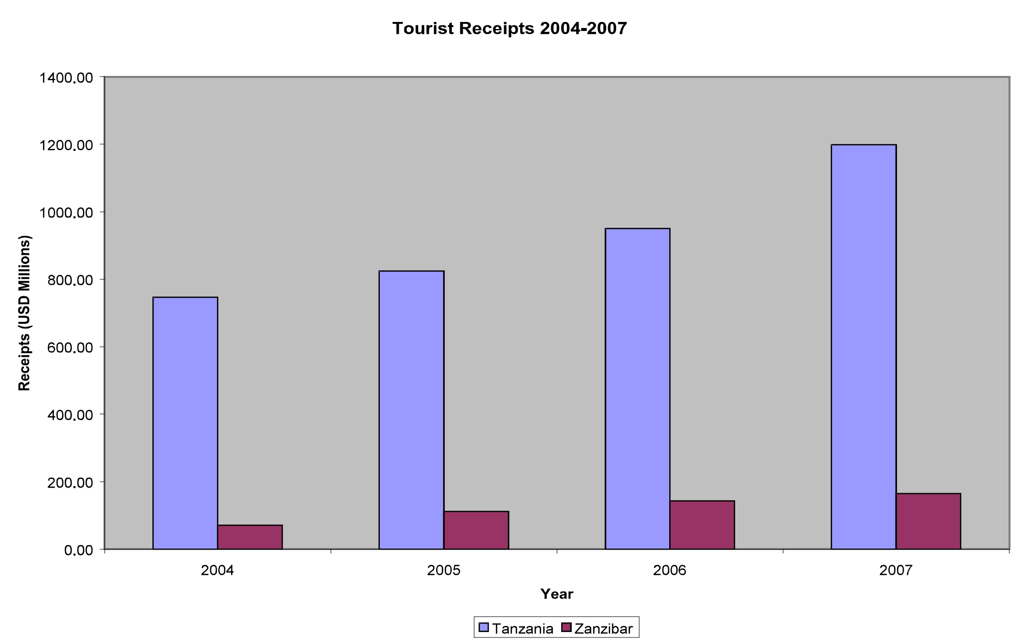
Beach Tourism in Zanzibar

3.19 Tourist Expenditure

Estimation of tourist expenditure for the United Republic of Tanzania is one of the main objectives of the visitors' Exit survey. The expenditure is estimated using tourist expenditure model that was developed in 2001. The variables of the model include the number of visitors from the Immigration Department, average length of stay and average expenditure per person per night obtained from the survey. In this regard, the model estimated that Tanzania earned USD 1,198,764,519 in 2007, out of which Zanzibar earned USD 164,452,598.0. These earnings are accrued from 719,031 international visitors who visited Tanzania, out of which 100,221 tourists visited Zanzibar.

Chart 15 shows tourist receipts for four consecutive years; 2004, 2005, 2006 and 2007, estimated using the tourist expenditure model. The Tanzania tourist receipts increased from USD 746.0 million in 2004 to 1,198.8 million in 2007, while Zanzibar's earnings increased from USD 71.3 million to USD 164.5 million, respectively.

Chart 15: Tourist Earnings in Tanzania and Zanzibar, 2004 - 2007.



3.20 Average Expenditure

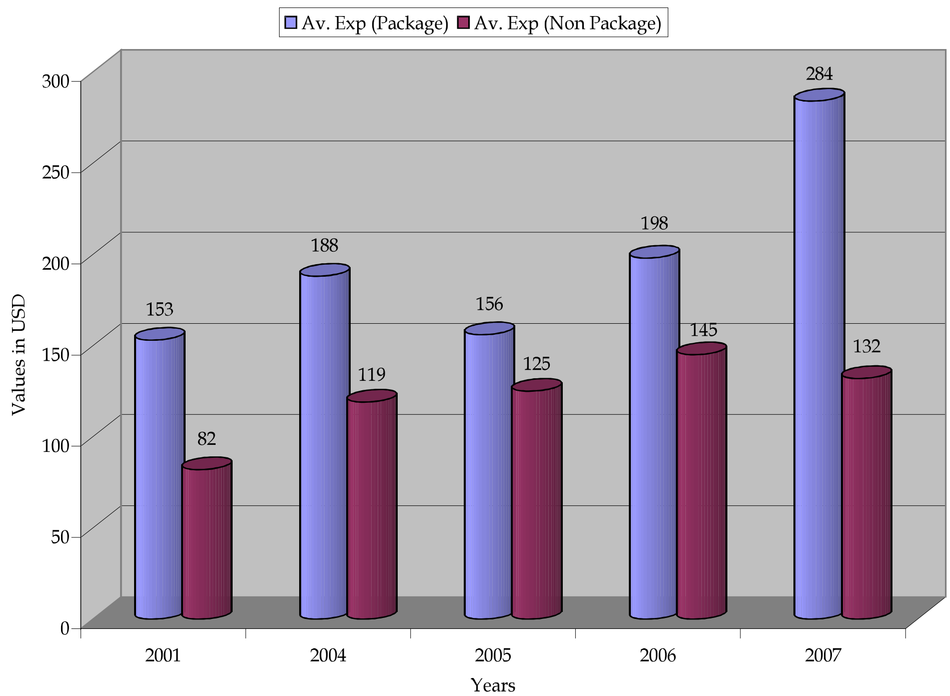
The survey's results reveal that overall, a tourist spent an average of USD 217 per night. The overall average expenditure of a visitor for all the countries involved in the survey under holiday makers is USD 214. On the other hand, the package and non package expenditure of a visitor per night under the same category are USD 265 and USD 169 respectively. Tourists prefer the package arrangement than the non-package for many reasons like convenience during travel, safety and easiness of reservation through a travel agent.

Table 3.18: Average Holiday Visitors' Expenditure per Night (USD) in the United Republic of Tanzania

Country	Average Package Expenditure	Average Non-Package Expenditure
United States of America	291	195
United Kingdom	271	172
South Africa	216	167
Germany	228	132
Netherlands	293	138
Canada	234	185
Australia	289	161
Zambia	224	228
Spain	311	135
France	273	147
Italy	230	152
Belgium	340	107
Switzerland	249	160
Sweden	173	161
Norway	178	114

Table 3.18 presents average expenditure of visitors from the top 15 source markets who came to the United Republic of Tanzania for leisure and holidays. The results on the package arrangement depict that holiday markers from Belgium and Spain spend more than USD 300 on average. On the other hand, holiday makers from Sweden are the least spenders with an average expenditure of USD 173 per night per person.

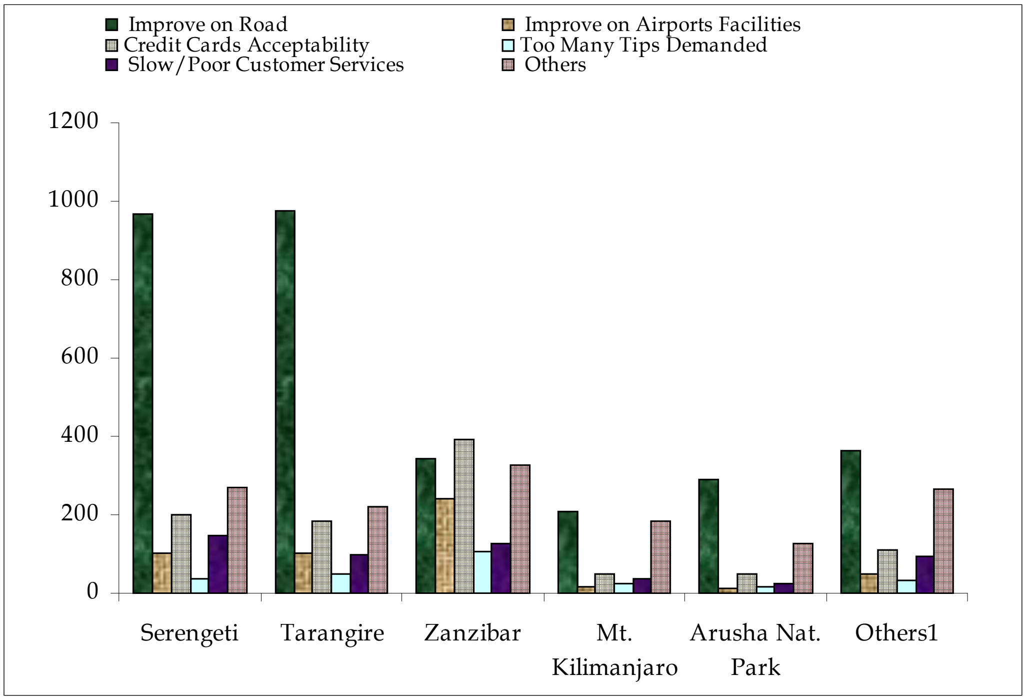
Chart 16: Average Expenditure by Travel Arrangement



There has been a significant increase in the package and non-package average expenditure by visitors to Tanzania between 2001 and 2007. Average expenditure for visitors by the package travel arrangement has been increasing between 2001 and 2007, with the exception of 2005. Generally, the average expenditure for the package arrangement is higher than that of non package for all years with a highest package average expenditure recorded in 2007.

3.21 Areas for Improvement

Chart 17: Tourist Attractions and Areas for Improvement



Note: 1. Others[1] include Amboni Caves, Bagamoyo, Gombe, Mikumi, Selous, Ruaha and Udzungwa

Chart 17 shows the areas of improvements as suggested by the visitors with respect to the visited tourist attractions. Overall, all the visitors stressed on the need to improve the roads leading to Serengeti and Tarangire. Other areas that require improvement include provision of facilities such as water and electricity in parks, camps, hotels and streets. Moreover, services at airports coupled with the facilities like air conditioning, power, chairs and signage, among others, need to be enhanced in all the airports. In relation to the airports, a number of visitors were not pleased with the visa procedures at entry points as it takes longer time and there are not enough chairs at the waiting lounge. Improvement is also required in the payment system by wider acceptance of credit cards by tourism establishments and more availability of ATM machines at least in all exit points. The comprehensive list of areas that require improvement is shown as **Appendix 1**.

However, some of the comments are more pronounced in one tourist attraction compared to the other. For example, in Serengeti and Ngorongoro, the main concern of the visitors was on the improvement of the roads, facilities at the parks and the airport. In the case of Zanzibar, most visitors complained about the forced tips demanded by the staff at the airport and they were not satisfied with the status of the airport. For example, there is no shade to hide during day time or rainy season when the visitors are checking in. Moreover, the visitors were not pleased with the state of the washrooms at the airport in terms of cleanliness, and other facilities like water and toilet papers.

It is important to note that the results obtained from the preceding surveys also indicated that most of the visitors complained about the state of the infrastructure, especially the roads and the airports. Second, in prominence was the need to improve facilities such as toilets at the camps, parks and along the streets. The government and the private sector intervention on the mentioned areas is required.

Chapter 4

Conclusion and Recommendations

4.1 Conclusion

This report concludes the comprehensive International Visitors' Exit Survey that was conducted for three weeks in September 2007 and May 2008. The survey which is the fifth in the series had the following objectives:

- To collect data from the tourism sector and improve compilation of the Balance of Payments and National Accounts Statistics.
- To gather information for tourism promotion and macro-economic policy formulation.
- To set benchmarks for the tourism industry
- To provide the basis for construction of Tourism Satellite Account (TSA)

The survey has successfully collected data and information and has met the intended objectives. Through the survey, tourism earnings have been estimated, using the updated information. In addition, useful information for tourism promotion has been gathered. It is worth noting that, this survey was conducted at the time when the Global Financial Crisis had just started in USA and Western Europe but its effects were not yet felt in Tanzania.

Experiences from the past crises like the September 11 terrorist attack and the Avian Flu showed that people continue to travel but would travel differently from the way they used to do during times of economic buoyancy. Destinations that offer *value-for-money* are likely to succeed and short-haul destinations will become more attractive compared to the long-haul.

4.2 Recommendations

Based on the survey's results, the following recommendations are given in order to enhance the development of the tourism industry in Tanzania:

1. Given that the majority of the visitors who come to Tanzania use air transport; there is a need for improving the airports. Both, the Zanzibar International Airport and the Julius Nyerere International Airport need to be upgraded and properly maintained.

Responsible Institutions: **The Ministry of Infrastructure Development and Tanzania Airports Authority (TAA).**

2. The average length of stay for the visitors to Tanzania has remained at 12 days. In order to prolong the length of stay and increase tourism earnings at the destination, efforts should be made to diversify tourist products from relying heavily on wildlife tourism, to opting for other products like eco-tourism, cultural and conference. Moreover, urban tourism in Dar es Salaam city and Bagamoyo should be developed.

Responsible Institutions: **MNRT, TTB, TCT, ZCT, Zanzibar Association of Tourism Investors (ZATI), Dar es Salaam City Council, and Bagamoyo District Council**

3. The visitors were concerned about limited acceptance of credit cards at the tourism establishments and insufficient number of ATMs. It is therefore important to ensure that the payment methods are improved by enhancing the acceptance of credit cards as well as availability of ATMs.

Responsible Institutions: BOT, TCT, ZATI, Tanzania Bankers Association (TBA).

4. The United States of America and the United Kingdom continued to be the major tourist source markets to Tanzania. Apart from maintaining these markets, it is also important to penetrate into the emerging markets in Eastern Asia, Middle East and Eastern Europe.

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

5. There were few senior citizens who visited Tanzania. These are the people who have ample time for holidays and high disposable income. In order to capture this market segment, it is important to upgrade standards in accommodation establishments, especially special facilities to cater for the elderly and people with disabilities.

Responsible Institution: **MNRT, TTB, TCT, ZCT and ZATI.**

6. Foreign-based travel agents and operators continue to dominate in organising tourist visits to Tanzania. It is important for the Tanzania Tourist Board to liaise with these companies in promoting tourism in the country. This is also a challenge for the local tour companies to upgrade their operations and be able to penetrate to the tourist source markets.

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

7. In order to mitigate the effects of the global financial crisis on the tourism sector, the following are recommended:

- There is a need to closely monitor the tourism business trend through compilation and analysis of statistical data, information and consulting with both the Public and Private Sectors;
- Promote domestic tourism;
- Explore and promote EAC market (which has over 80 million People);
- SADC member states should be encouraged and urged to collaborate in promoting regional tourism;
- Penetrate into emerging markets of China, Russia, Japan, South Korea and India and Eastern Europe;
- Target independent travelers who are more resilient at times of crisis;
- Companies should concentrate on containment of cost in order to keep their competitive edge and
- Improving the quality of products and services.

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

Appendices

Appendix 1

Tourist Attractions and Areas of Improvement

Areas of Improvement	Amboni Caves	Arusha Nat. Park	Bagamoyo	Gombe	Manyara	Mikumi	Mt. Kili	Museums	Ngorongoro	Ruaha	Selous	Serengeti	Tarangire	Udzungwa	Zanzibar
Improve on Road	10	290	39	6	74	76	209	24	62	18	39	966	974	17	342
Improve Facilities (Toilets, Water, Parks, Electricity, Camps, Street, Hotels, etc)	1	93	12	1	37	45	124	5	25	10	13	366	275	2	257
Slow/Poor Customer Service		13	12		6	9	10	2	14		22	75	58		34
Flycatchers/Vendors are Annoying		16			1		12	4	10		3	26	35	6	59
Slow Airport Procedures/Processing of Visa on Entry		11	5		4	1	18		8	3	6	71	41	3	94
Improve on Airports Facilities e.g. Air Condition, Toilets etc		14	4		19	1	18		17		8	101	104	2	241
Wider Acceptability of Credit Cards at Tourism Establishment and Travel		16	4	1	6	4	25	2	6	13	6	89	26		40
Improve Social Services i.e. Education, Health		26	3		11	16	22		3		4	29	37	10	44
High Prices		8	6		12	6	30		7	2	10	27	19	5	41
High Park Fees		9	5		4		9		1		5	11	8	1	2
High Visa Fees		1	2			1			2			3	2		8

Areas of Improvement	Amboni Caves	Arusha Nat. Park	Bagamoyo	Gombe	Manyara	Mikumi	Mt. Kili	Museums	Ngorongoro	Ruaha	Selous	Serengeti	Tarangire	Udzungwa	Zanzibar
Improve on Security	1	12	8		1	7	31		1		1	27	20		34
Lack of Information on Tourist Attractions		6	4		6		9	9	1		2	10	21		10
Too Many Tips Demanded		17	2	2	13	3	23		1	1	11	36	51		108
Inadequate Shopping Facilities															5
Emphasis on Conservation Measures		10	7		2	3	13		5		8	20	31		34
Quality of Touring Services		17	3		18	1	10		3		7	24	39		33
Lack of Transparency In Pricing		3	2		1		2		1			9	6		6
Introduce Local Menu in Tourist Hotels and Improve on Food Preparation					2		3		2			9	8		2
Direct Flight from Source Market		1					5				7	13	6		3
Improve on other Infrastructure (Internet, Communication)		8			4	6	8	1	8		5	29	18		34
Availability of Atms		10				5	4		2		6	31	15		22
Others	1	44	8		10	5	38	6	5	2	22	88	85	1	113
Total	13	625	126	10	231	189	623	53	184	49	185	2060	1879	47	1566

Appendix II

THE 2007 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, we kindly ask you to complete this questionnaire as accurately as you can. The information you give will help us improve and develop our tourism sector. The Ministry of Natural Resources and Tourism, National Bureau of Statistics, Bank of Tanzania, Immigration Department and the Zanzibar Commission for Tourism are jointly carrying out this survey.

FOR OFFICIAL USE:

CODE NUMBER:____

NAME OF ENUMERATOR:__________________________________

DATE:________________ SIGNATURE:_____________________

1. **~~Nationality~~.......... Country of usual residence ....**

2. **Age group (tick one only)**

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

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

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

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

Females	
Males	

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

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

6. **Mode of transport used in entering Tanzania (*tick one only*)**

Air [ ] Road [ ] Rail [ ] Water [ ]

Please name the transportation company (e.g. KLM, BA, etc) ....

7. **Primary source of information that was most influential in selecting Tanzania as a destination: (*tick one only*)**

Travel Agent	[ ]	Tour operator brochures	[ ]
Guide books	[ ]	Tanzania Tourist Board	[ ]
Internet	[ ]	Word of mouth	[ ]
Zanzibar Commission for Tourism	[ ]	Tanzania Missions Abroad	[ ]

Other (specify) ....

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

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

Independent/Non-package tour [ ]
If "independent", tick and go to question 13

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

International transport [ ]
Accommodation [ ]
Food [ ]
Internal transportation in Tanzania [ ]
Sightseeing/excursion/game activities [ ]
Guided tour [ ]
Travel insurance [ ]
Other (please specify) ....

10. **Please tick below the main reasons for choosing the package tour as your mode of travel**

Ease of reservation through the travel agent [ ]
Convenience during travel [ ]
Saving money [ ]
Safety [ ]
Other (please specify) ....

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

12. **Total cost of the package tour: Currency** [ ]

13. **Number of nights spent in:**

Tanzania Mainland [ ]
Zanzibar Islands [ ]

We kindly request you to answer the following few questions about the expenditure you made in the trip to Tanzania. In case you are filling this form on behalf of your family or group (whose expenditure is from one account), please give total expenditure. The information provided will be anonymous, as we are not asking for any identification questions. Report in any currency

14. How much money did you spend in Tanzania during this trip, including cash, traveller's cheques, credit cards? Currency [ ]
(*please give your best estimation in case you do not remember the exact figures***)**

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

Accommodation alone	Currency	
Food and drinks	Currency	
Internal Transportation (Included Organised tour)	Currency	
Shopping	Currency	
Sight seeing	Currency	
Car hire	Currency	
Gate fees	Currency	
Others (please specify):	Currency	

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

Cash [ ] Traveller's Cheques [ ]

Credit Card [ ] **Other (please specify)** ....

17. Name the company (Travel Agent/Tour Operator) that was responsible for arranging your visit to Tanzania

In your home country...

In Tanzania..

In other countries...

18. **Which countries in Africa (including Tanzania) have you visited in the last five years?**

Tanzania... .times	Seychelles .... times
Kenya .... times	South Africa .... times
Uganda.. times	Botswana............................. times
Mauritius... times	Zimbabwe............................ times

19. **In sequence, what countries of Africa (including Tanzania) have you visited/will you visit in this trip?**

Note: *Countries may appear more than once, in a sequence*

1.....................................	4	7.......................................
2.....................................	5	8.......................................
3.....................................	6	9 ....

20. **Generally, how did you find the cost of touring Tanzania as compared to the countries in question 19?**

Higher [ ]

Lower [ ]

Same [ ]

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

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

22. **Which attractions did you visit on this trip (** *tick all that apply* **)**

Amboni Caves	[ ]	Mikumi	[ ]	Ruaha	[ ]	Ngorongoro	[ ]
Arusha Nat. Park	[ ]	Selous	[ ]	Manyara	[ ]	Zanzibar	[ ]
Bagamoyo	[ ]	Tarangire	[ ]	Mt. Kilimanjaro	[ ]	Museum	[ ]
Udzungwa	[ ]	Serengeti	[ ]	Gombe	[ ]	Other……………..	

23. Would you like to visit Tanzania again? (*tick*)

Yes [ ]

No [ ]

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

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

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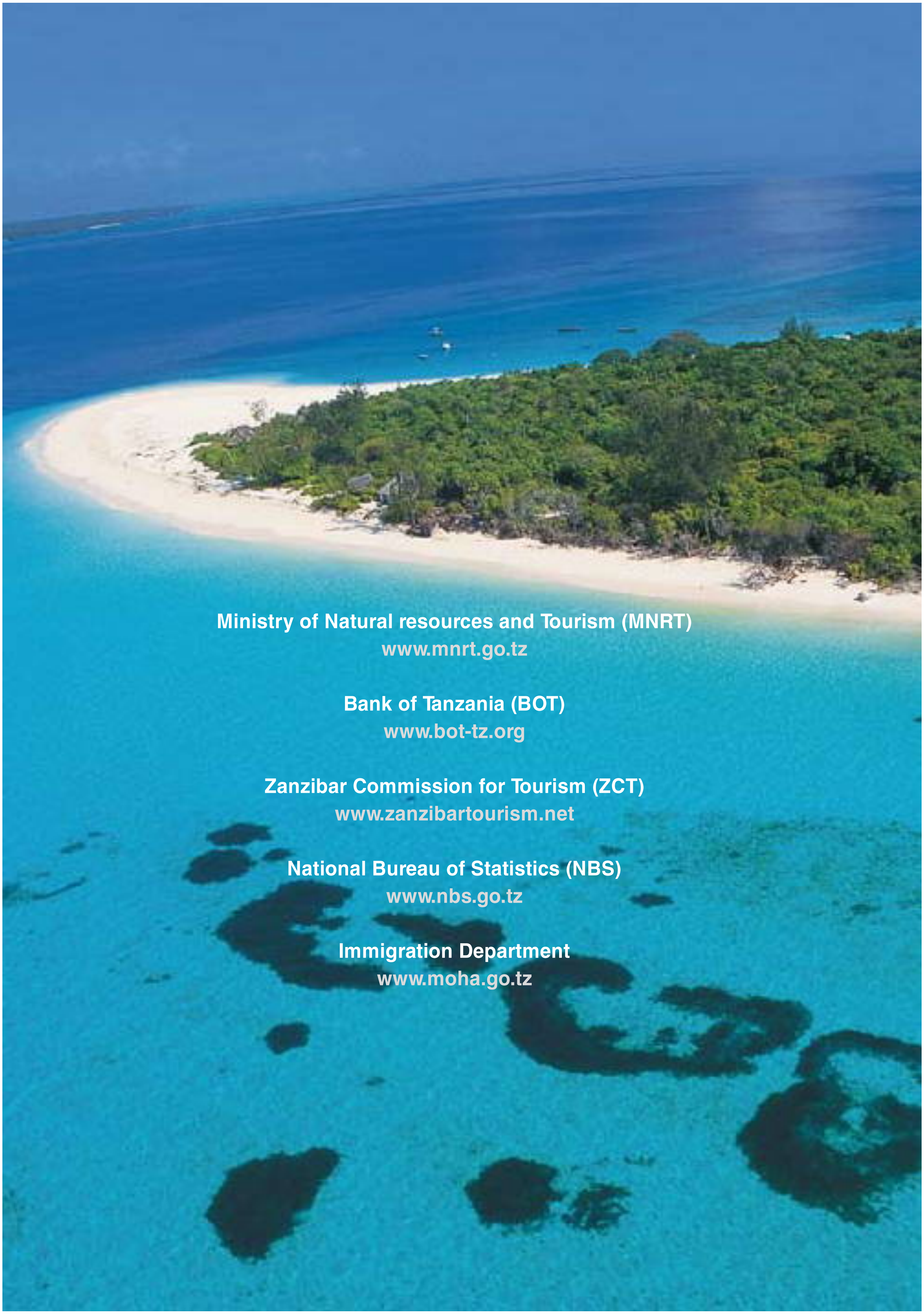

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www.mnrt.go.tz

Bank of Tanzania (BOT)
www.bot-tz.org

Zanzibar Commission for Tourism (ZCT)
www.zanzibartourism.net

National Bureau of Statistics (NBS)
www.nbs.go.tz

Immigration Department
www.moha.go.tz