THE 2018 INTERNATIONAL VISITORS' EXIT SURVEY REPORT

THE TANZANIA TOURISM SECTOR SURVEY

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ACRONYMS

AAKIA	Abeid Amani Karume International Airport
BOT	Bank of Tanzania
HAT	Hotel Association of Tanzania
JNIA	Julius Nyerere International Airport
KAS	Kasumulo
KIA	Kilimanjaro International Airport
LGAs	Local Government Authorities
MANY	Manyovu
MFAEAC	Ministry of Foreign Affairs and East Africa Cooperaton
MNRT	Ministry of Natural Resources and Tourism
MWTC	Ministry of Works, Transport and Communication
MTU	Mtukula
NAM	Namanga
NBS	National Bureau of Statistics
TAA	Tanzania Airport Authority
TANAPA	Tanzania National Parks Authority
TATO	Tanzania Association of Tour Operators
TCT	Tourism Confederation of Tanzania
TIC	Tanzania Investment Centre
TTB	Tanzania Tourist Board
TUN	Tunduma
UNWTO	United Nations World Tourism Organization
URT	United Republic of Tanzania
VFR	Visiting Friends and Relatives
ZATI	Zanzibar Association of Tourism Investors
ZCT	Zanzibar Commission for Tourism

GLOSSARY

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

Average Length of Stay - average number of nights that visitors spend at a destination.

Commissions - a percent of the total product cost paid to travel agents and other travel product distributors for selling the product or service to the consumer. Travel agents usually receive an amount not less than 10 percent of the retail price.

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

Demographic characteristic - personal information about customers; for example, age, income and gender.

Diversification - the process of developing new tourism products and/or new markets, in order to achieve business growth.

High season - the period of the year when occupancy/usage of a hotel or attraction is normally the highest; also referred to as peak season.

Independent Tour/Non package tour - self travel arrangement which doesn't include pre-arrangements and all items and service are purchased at host destination.

Low season - the time of the year at any given destination, when tourist flow, and often rates, are at their lowest; also known as off- peak season.

Package tour - pre-arranged trip (normally by travel agents) done outside the country with a combination of elements such as airfare, accomodation, sightseeing, and social events put together and sold at an all-inclusive price in a single transaction. Each component of the package is discounted, resulting in an attractive price that consumers could not get if they were to purchase the components individually.

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

Tour Operator - a person who designs, develop markets and operates packaged travel and tourism products and tours. Tour operators sell tourism products through travel agents or directly to consumers.

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

Travel Agent - a person who arranges travel for individuals or groups. Travel agents may be generalists or specialists (cruise, adventure travel, conventions and meetings). The agents receive a minimum 10 percent commission from accommodations, transportation companies and attractions for coordinating the booking of travel. They typically coordinate travel for their customers at the same or lower cost than if the customer booked the travel on his/her own.

Travel Party - consists of all people travelling together, but not necessarily from the same permanent residence.

Trade Show/Tourism Show - a tourism event that involves exhibits of destinations and tourism company products.

Long Haul visitor - refers to visitors coming from far away. Usually, if the travelers' flight from the destination is more than three hours.

Purpose of visit - it is the main purpose of the trip without which it would not have taken place.

Tourism show - it is an event which provides a unique opportunity to showcase tourism products and services, meet, network, negotiate and conduct business with domestic and international tourism stakeholders.

International visitor - person who travels to a country outside his/her usual environment, for a period not exceeding twelve months, whose main purpose of visit is other than to be employed by resident entity in the country visited.

International tourist - is an international visitor who travels to a country for at least one night and whose main purpose of visit may be classified under leisure and holidays, business and other purposes (education, health, transit, etc).

Visitor Experience - the sum of all perceptions, senses stimulated, emotions evoked and interactions a traveler has with the people, places and cultures of a destination, the communities and the businesses they encounter.

FOREWORD

The tourism sector continues to play a vital role in the economy as it contributes significantly in bringing foreign exchange earnings and job creation. The global international tourist arrivals increased by 6.1 percent to 1,403 million in 2018, from the number of arrivals recorded in 2017, driven by favourable economic environment and strong outbound demand from the major source markets. The Middle East registered the strongest growth of tourist arrivals of 9.1 percent, followed by Africa with growth of 8.1 percent. Europe accounted for the largest share, with 50.8 percent of the global tourist arrivals in 2018, followed by Asia and the Pacific and the Americas. The share of Africa increased slightly to 4.8 percent in 2018 from 4.7 percent in 2017.

This report provides the results of the 2018 Tanzania Tourism Sector Survey (TTSS), conducted jointly by the Ministry of Natural Resources and Tourism (MNRT), Bank of Tanzania (BOT), National Bureau of Statistics (NBS), Immigration Services Department and the Zanzibar Commission for Tourism (ZCT).

In 2018, tourism earnings increased by 7.2 percent to USD 2,412. 3 million, compared with USD 2,250.3 million recorded in 2017. There was also a 13.5 percent increase to 1,505,702 of international arrivals from 1,327,143 visitors in 2017. This development is largely explained by the enhanced promotional efforts coupled with exclusive tourist attractions in the country. In Zanzibar, tourism earnings rose by 3.7 percent to USD 507.5 million; owing also to an increase in the number of tourists arrivals.

The majority of the visitors were from the United States of America, followed by Kenya and the United Kingdom. These were also the leading source markets for Zanzibar, with Italy replacing Kenya. The majority of the visitors were holiday makers, greatly impressed with the warmth and friendliness of the people as well as unique wildlife and beautiful beaches. These achievements reflect the efforts made by the Government of the United Republic of Tanzania and the Revolutionary Government of Zanzibar in marketing and promoting Tanzania as the best tourism destination.

The report provides useful information to array of stakeholders, including academia and the public at large. It will also be used for policy making, marketing strategies as well as decision making.

Hon. Dr. Hamisi Kigwangalla (MP)
Minister
Ministry of Natural Resources and Tourism

Prof. Florens A. M. Luoga
Governor
Bank of Tanzania

ACKNOWLEDGEMENT

The Steering Committee of the Tanzania Tourism Sector Survey would like to express its appreciation to various stakeholders involved in data collection and preparation of the 2018 International Visitors' Exit Survey report. Special thanks go to the Chief Executive Officers of the participating institutions namely: the Ministry of Natural Resources and Tourism; Bank of Tanzania; National Bureau of Statistics; Immigration Services Department; Zanzibar Commission for Tourism and the Tourism Confederation of Tanzania, for their diligent guidance and support. The Committee is grateful to the Immigration Services Department staff, particularly the officers in-charge at the Julius Nyerere International Airport, Abeid Amani Karume International Airport, Kilimanjaro International Airport, Horohoro, Namanga, Tunduma, Mtukula and Manyovu boarder points. The profound gratitude goes also to the researchers and data entrants for their commitment and hard work.

The overall supervision of this work was under the conscientious leadership of Mr. Deograsias Mdamu (Director of Tourism-MNRT) and Dr. Suleiman Missango (Director, Economic Research and Policy-BOT). Other members of the Steering Committee are Mr. Daniel Masolwa (Director for Economic Statistics-NBS), Mr. Edward Chogero (Commissioner, Finance and Administration-ISD) and Dr. Miraji Ussi (Director for Marketing and Promotion-ZCT). The Technical Team was led by Mr. Paskasi Mwiru, Assistant Director of Tourism (MNRT) and Mr. Festo Mlele, Manager, International Economics and Trade Department (BOT). Other members of the team were Dr. Charles Masenya (BOT), Ms. Villela Waane (BOT), Mr. Phillip Mboya (BOT), Mr. Evarist Mgangaluma (BOT), Mr. Malik Suleiman (BOT), Ms. Lulu Edward (BOT), Mr. Josephat Msimbano (MNRT), Mr. Valerian Tesha (NBS), Ms. Eliaranya Lema (NBS), Ms. Jovitha Rugemalila (NBS), Mr. Christian Mndeme (Immigration Services Department) and Mr. Maabad Jaffar (ZCT). The hard work of the IT staff Mr. Rweyemamu Barongo from BOT is higly treasured.

EXECUTIVE SUMMARY

Introduction

The International Visitors' Exit Survey is conducted on annual basis, the main objective being to get information for estimating tourist expenditure in the country as well as for compilation of the National Accounts and Balance of payments statistics. The survey's findings are also used for policy review, formulation and decision making.

Global Tourism Developments

The UNWTO World Tourism Barometer (2019) shows that the international tourist arrivals increased by 6.1 percent to 1,403 million in 2018, from the number of arrivals recorded in 2017, driven by favorable economic environment and strong outbound demand from the major source markets. The Middle East registered the strongest growth of tourist arrivals of 9.1 percent, followed by Africa with growth of 8.1 percent. The growth for Asia and the Pacific and Europe was around 6.0 percent, in line with the world's average. Europe accounted for the largest share with 50.8 percent of the global tourist arrivals in 2018 followed by Asia and the Pacific, and the Americas.

Recent Tourism Developments in The United Republic of Tanzania

During 2018, a number of activities and initiatives which have direct and indirect impact on the tourism sector were undertaken:

i. The fifth Annual Diaspora Homecoming Conference was held in Tibirinzi -Pemba, from 18th to 19th August, 2018. The Conference attracted about 450 participants from various parts of the world. The Conference aimed at, among other things, bringing together all Tanzanians living abroad to meet, exchange ideas, and convince them to invest in the country;

ii. Tanzania participated in several international tourism exhibitions including World Travel Market (WTM) in London, Internationale Tourismus Borse (ITB) in Germany, WTM Africa in South Africa and India Outbound Travel Mart (OTM) in India. These exhibitions are among the key promotional tools as they build a strong brand image via product demonstrations, seminars, conferences and meetings;

iii. For the first time, Zanzibar hosted an International Tourism show namely, Zanzibar Tourism Show (ZTS) in October 2018 at Hotel Verde. The event will now be held on annual basis and will focus on inbound and outbound travelers. The show is expected to attract hundreds of tourism and travel professionals from all over the world;

iv. Tanzania Tourist Board organized a three day city road show in India (Delhi, Mumbai and Ahmedabad) to showcase the country's diverse tourism offerings in the Indian market. The show aimed at promoting the country's tourist attractions, rich wildlife, flora and fauna and its wealth of heritage, with a view to capture the fast-growing outbound travelers from India;

v. Tanzania won the "Best Destination in the World" award in the category of Exotic Destination 2018, in a poll conducted by the National Geographic Magazine's Russian travel guide at a ceremony held in the Tanzanian Embassy in Moscow on 21st November, 2018. Also, Zanzibar won the Emerging Tourism Destination and Market Award at The Global Tourism Council 2018 in Cairo-Egypt;

vi. Urithi Festival was launched on 15th September 2018 in Dodoma. The Festival is intended to promote national identity, national symbols, pride, unity and patriotism; celebrate Tanzania's rich and diversified cultural heritage, preserving and promoting cultural heritage and values. The Festival is an opportunity to celebrate and cherish Tanzania's rich and diversified cultural heritage, and an opportunity for tourism stakeholders to showcase their products and services;

vii. The Tanzania Broadcasting Corporation has introduced a tourism channel which will showcase the exclusive tourist attractions in and out of Tanzania and thus attract more visitors. The new channel will have programs focusing on wildlife as well as the archaeological sites and ruins, cultural activities, marine parks, beaches and other tourism related activities;

viii. The fourth edition of annual Swahili International Tourism Expo (S!TE) was held in Dar es Salaam from 12th to 14th October, 2018. The expo was attended by 152 exhibiting companies from 12 countries, and 333 International Buyers and Travel Media from forty countries; and

ix. The Tanzania Tourist Board organized a road show in five major cities in China (Shanghai, Guangzhou, Hong Kong, Chengdu na Beijing). The main goal of the show was to promote Tanzania's tourism with a view to increase the share of Chinese tourist market.

Main Findings of the Survey

Main source markets continued to be diversified

The top 15 source markets accounted for 71.8 percent of total visitors, the United States of America taking the lead with 15.6 percent, followed by Kenya and the United Kingdom. The top 15 source markets are relatively diversified with new entrants namely, Belgium, Burundi, Spain and Zambia.

Average expenditure increased

The overall average expenditure per person per night in the URT increased to USD 193.0, compared with USD 162.0 recorded in 2017. The average expenditure per person per night for visitors who came under the package tour arrangement was USD 331.0, while that of the non-package visitors was USD 135.0. Leisure and holiday visitors continued to be the highest spenders.

Tourism earnings continued to grow

Earnings from tourist expenditure increased by 7.2 percent to USD 2.4 billion from USD 2.3 billion recorded in 2017, supported by increase in the number of international arrivals coupled with an increase in average expenditure.

The majority of visitors came for leisure and holidays

The findings indicate that, 62.6 percent of the interviewed visitors came to Tanzania for leisure and holidays, followed by those who came to visit friends and relatives. Visitors who came for religious purposes were the least.

Holidaymakers spent the most

Leisure and holidaymakers continued to be the highest spenders with an overall average of USD 394.0 per person per night. Holidaymakers who came under the package tour arrangement spent an average of USD 465.0 per person per night, while those who came under non-package spent an average of USD 162.0.

The majority of the visitors stayed between 8 and 11 nights

The overall average length of stay for visitors to the United Republic of Tanzania was 10 nights, the same level as recorded in 2017. Visitors who came for visiting friends and relatives recorded the longest average length of stay of 11 nights, followed by visitors who came for leisure and holidays that stayed 10 nights. Visitors who came for business purposes recorded the shortest average length of stay of 8 nights.

Most visitors came for wildlife based tourism

Wildlife tourism continues to be the mainstream attraction in Tanzania accounting for about 36.0 percent due to the existence of numerous National Parks and Game Reserves. Marketing of these attractions together with the well-maintained infrastructure has made wildlife safaris a unique attraction in the country. Other main tourism activities include beach, cultural, business, mountain climbing, shopping and conference tourism.

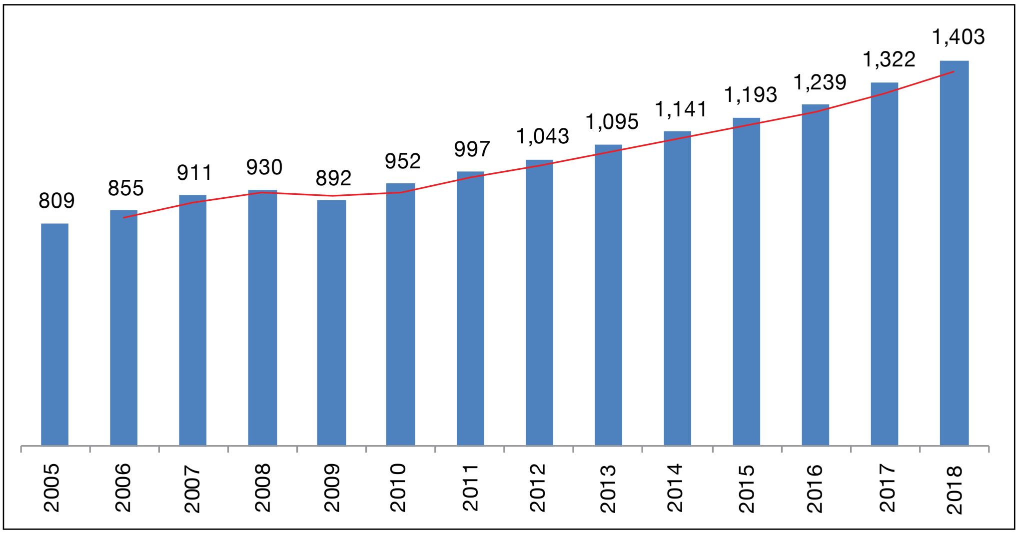
Chapter 1: Recent Developments in the Tourism Industry

1.1 Global Perspective

The UNWTO World Tourism Barometer (2019) shows that the international tourist arrivals increased by 6.1 percent to 1,403 million in 2018, from the number of arrivals recorded in 2017 (**Chart 1.1**). The increase was driven by favourable economic environment and strong outbound demand from major source markets. This is the second strongest year since the UNWTO long-term growth forecast of 2010.

Chart 1.1: Global international tourist arrivals, 2005-2018

In millions



Source: UNWTO Barometer, January 2019

The Middle East registered the strongest growth of tourist arrivals (9.1 percent), followed by Africa with a growth of 8.1 percent. Growth of arrivals to Asia, the Pacific and Europe was around 6.0 percent in line with the world's average (**Table 1.1**).

Table 1.1: International tourist arrivals by regions, 2010-2018

Region	2010	2011	2012	2013	2014	2015	2016	2017	2018
					In Millions				
Europe	488	521	541	567	580	605	619	671	713
Asia and the Pacific	208	218	234	250	264	284	306	324	343
Americas	150	156	163	168	182	194	201	207	217
Africa	50	50	52	55	55	54	58	62	67
Middle East	55	50	51	49	55	57	56	58	64
					Percentage change				
Europe	5.7	6.8	3.9	4.7	2.4	4.3	2.4	8.4	6.2
Asia and the Pacific	15.0	4.9	7.1	6.9	5.8	7.4	7.7	5.9	5.8
Americas	6.9	3.5	4.5	3.1	8.5	6.5	3.7	2.9	5.1
Africa	7.9	-0.6	4.6	4.4	0.9	-3.1	7.7	7.8	8.1
Middle East	6.5	-10.6	2.2	-3.0	12.8	2.9	-2.5	4.9	9.1

Source: UNWTO Barometer, Various Issues

Europe continued to account for the largest share of tourist arrivals in 2018 accounting for 50.8 percent, similar to the share recorded in 2017 followed by Asia and the Pacific, the Americas, Africa and the Middle East (**Table 1.2**). The share of Africa increased slightly to 4.8 percent in 2018 from 4.7 percent in 2017.

Table 1.2: Market shares of international tourist arrivals

Percent

Region	2014	2015	2016	2017	2018
Asia and the Pacific	23.3	23.8	24.7	24.5	24.4
Europe	51.0	50.7	50.0	50.8	50.8
Middle East	4.9	4.8	4.5	4.4	4.5
Africa	4.9	4.5	4.6	4.7	4.8
Americas	16.0	16.2	16.2	15.6	15.5
World	100.0	100.0	100.0	100.0	100.0

Source: UNWTO Barometer, Various Issues

UNWTO projects that international tourist arrivals worldwide will grow by between 3.0 and 4.0 percent in 2019 (**Table 1.3**). The regions that are expected to register strong growth are Asia and the Pacific, Middle East and Africa. The growth in Europe and Americas are expected to be between 3.0 and 4.0 percent, lower than in other regions.

Table 1.3: International tourist arrivals - actual growth and projection

Percent

	Change					Average a year	Projection
	2014	2015	2016	2017	2018	2008 - 2018	2019
World	4.2	4.7	3.8	7.0	5.6	4.2	3.0 to 4.0
Europe	2.0	4.7	2.5	8.6	5.7	3.6	3.0 to 4.0
Asia and the Pacific	6.1	5.4	7.7	5.6	6.1	6.3	5.0 to 6.0
Americas	8.6	6.0	3.7	4.9	2.9	3.9	2.0 to 3.0
Africa	0.9	-2.9	8.0	8.2	7.3	4.3	3.0 to 5.0
Middle East	9.9	4.0	-4.7	4.1	10.3	2.2	4.0 to 6.0

Source: UNWTO Barometer, January 2019

1.2 Tourism Developments in Tanzania

Tourism in Tanzania remains to be among the key sectors in generating foreign exchange. In 2018 tourism activities generated USD 2.4 billion, which is equivalent to 7.2 percent increase from USD 2.3 billion collected in 2017. Consistently, the number of international arrivals increased by 13.5 percent to 1,505,702 from 1,327,143 in 2017. This development is largely explained by the ongoing extensive promotional efforts coupled with exquisite tourist attractions in the country.

1.2.1 Meetings and Conferences

1.2.1.1 The fifth diaspora conference

The Fifth Annual Diaspora Homecoming Conference was held in Tibirinzi-Pemba, from 18th to 19th August, 2018. The Conference attracted about 450 participants, among them, Tanzanians living abroad and returnees and stakeholders from the public and private sector.

H.E. Dr. Ali Mohammed Shein, the President of the Revolutionary Government of Zanzibar, officiating the 5th Diaspora of homecomming conference in Tibirinzi, 2018

The theme of the conference was "Diaspora na Maendeleo" (Diaspora and Development), with the aim to bring together Tanzanians living abroad to exchange ideas and explore investment opportunities for the prosperity of the nation's economy.

1.2.2 Promotion and Marketing

1.2.2.1 Tourism trade fairs and exhibitions

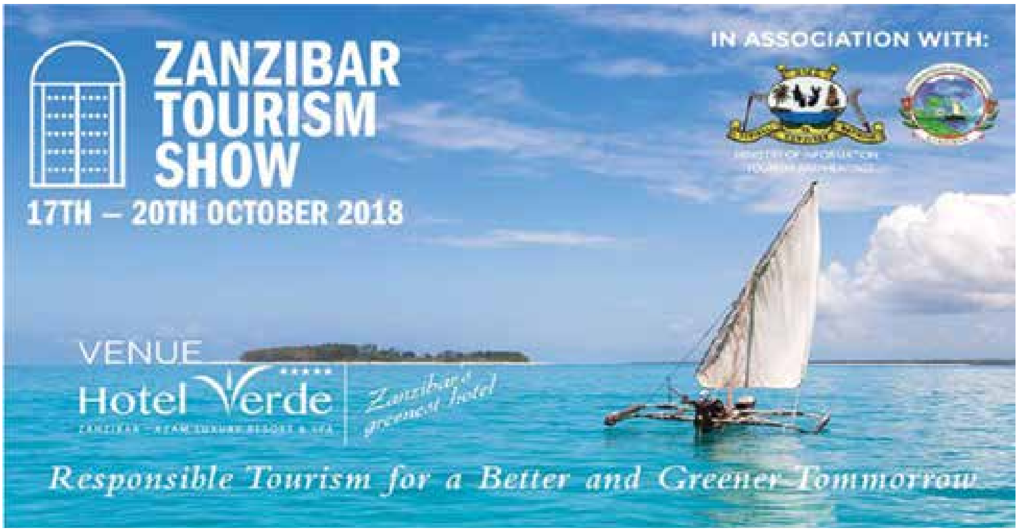
Tanzania continues to attend international tourism fairs and exhibitions as one of the means to deliver positive messages quickly and effectively to a large audience across wide geographical areas. The major tourism exhibitions in 2018 were World Travel Market (WTM) in London, Internationale Tourismus Borse (ITB) in Germany, WTM Africa in South Africa and Outbound Travel Mart (OTM) in India. Participation in such exhibitions has contributed to the increase in the number of tourist arrivals.

The Tanzanian team at ITB in Germany, 2018

1.2.2.2 Establishment of Zanzibar Tourism Show

Zanzibar hosted the first ever International Tourism Show (ZTS) at Hotel Verde, a newly established five star hotel, from 17th to 20th October, 2018. The show attracted over 150 travel and tourism companies across the world. The theme of the show was "Responsible Tourism for A Better and A Greener Tomorrow." The theme helped marketing Zanzibar as one of the leading tourist destinations in East Africa.

Zanzibar Tourism Show makes the third International tourism show in Tanzania. The other two are KILI – Karibu Fair organised by TATO and KILIFAIR Promotion Company Limited, which takes place in June every year, and Swahili International Expo (S!TE) organized by Tanzania Tourist Board (TTB) every October.



H.E. Dr. Ali Mohammed Shein, the President of the Revolutionary Government of Zanzibar during the launching of Zanzibar Tourism Show, 2018

1.2.2.3 Swahili International Tourism Expo (S!TE)

The 4th annual Swahili International Tourism Expo (S!TE) was held in Dar es Salaam, from 12th to 14th October 2018. The Expo was attended by 152 exhibiting companies from 12 countries, and 333 international buyers and travel media from 40 countries.

1.2.2.4 Tourism Road Shows

The Tanzania Tourist Board in collaboration with the public and private tourism stakeholders organized road shows in India and China to create awareness about Tanzania's tourist attractions and its offerings. The road shows also provided opportunities to officially announce the plan of ATCL to begin direct flights to Mumbai and Guangzhou. The cities involved in India were Delhi, Mumbai and Ahmedabad, while in China were Shanghai, Guangzhou, Hong Kong, Chengdu and Beijing were involved.

Tanzania Tourist Board Managing Director, Devotha Mdachi speaking during the road show at Hotel Roseate, Aerocity in New Delhi, 2018

1.2.3 Tanzania Wins the Best Tourist Destination in 2018

Tanzania won the "Best Destination in the World" award in the category of Exotic Destination 2018 in a poll conducted by the National Geographic Magazine's Russian travel guide. This is a third time in a span of seven years since 2011 when Zanzibar won the Star Travel Award as the best beach destination in Africa. This is the most prestigious award in Russia.

Hon. Mahmoud Thabit Kombo, the Minister for Information, Tourism and Heritage at award receving ceremony in Cairo, 2018

Furthermore, Zanzibar won Emerging Tourism Destination and Market Award at The Global Tourism Council 2018 in Cairo - Egypt. This is a rare award which goes to countries and cities that have demonstrated outstanding performance in promoting the tourism industry. The award is given to governments and leaders who have demonstrated high commitments towards promoting tourism in their countries. These achievements reflect the efforts made by the Government of the United Republic of Tanzania and the Revolutionary Government of Zanzibar in marketing and promoting Tanzania as one of the best tourism destinations in Africa.

1.2.4 Urithi Festival: Celebrating Our Heritage

The Urithi Festival, an annual event, was launched in 2018 in Dodoma and celebrated in various parts of the country. The festival is intended to add on cultural tourism products of Tanzania and provides an opportunity for residents, diaspora, visitors and tourists to celebrate and cherish Tanzania's rich and diversified cultural heritage.

Official launching of the Urithi Festival by Hon. Samia Suluhu Hassan, the Vice President of the United Republic of Tanzania at Jamhuri Stadium in Dodoma, 2018

1.2.5 The New Five Star Property, Hotel Verde, Opens in Zanzibar

The country requires additional accommodation facilities with rooms and services of international standards. The establishment of Hotel Verde Zanzibar -Azam Luxury Resort & Spa and other quality hotels, provide superior services to meet customer satisfaction. The country needs more of such accommodations ranging from three to five star hotels, in order to meet the demands and expectations of tourists.

Hotel Verde in Zanzibar

1.2.6 Launching of Tanzania Safari Channel

The Tanzania Broadcasting Corporation in collaboration with Tanzania National Parks, Ngorongoro Conservations Area Authority and Tanzania Tourist Board established a new tourism channel namely, Tanzania Safari Channel. The objective of the channel is to promote Tanzania's tourism in the domestic and international markets. The channel focuses on promoting wildlife based tourism, beach tourism, cultural heritage, marine based tourism and other tourism related activities.

Hon. Kassim M. Majaliwa (MP), the Prime Minister of the United Republic of Tanzania, launching theTanzania Safari Channel at TBC headquarters at Mikocheni, on 15th December, 2018

1.2.7 International Flights

The Government continues to strengthen ATCL by building the capacity to deliver services of international standard. In this regard, six new aircrafts have been added to the company's fleet. With this development, the national carrier will be able to fly directly to the tourism source market countries and increase the number of tourists visiting Tanzania. This will result in increase in tourism earnings.

ATCL's current and potential routes

His Execellency Dr. John Pombe Joseph Magufuli, the President of the United Republic of Tanzania at the reception ceremony of the 787 - Dreamliner at JKNIA

1.2.8 Establishment of a Paramilitary Unit

Tanzania launched the Conservation Army System (ARMY USU) in November, 2018 to ensure safety of designated areas for wildlife conservation and forests. The designated areas are national parks, Ngorongoro Conservation Area, game and forest reserves. The initiative is expected to improve management of the protected areas.

Hon. Samia Suluhu Hassan, the Vice President of the United Republic of Tanzania, during the launching ceremony of a Paramilitary Unit at Fort Ikoma, in Serengeti District, Mara Region

Chapter 2: Analysis of the Survey Results

2.1 Introduction

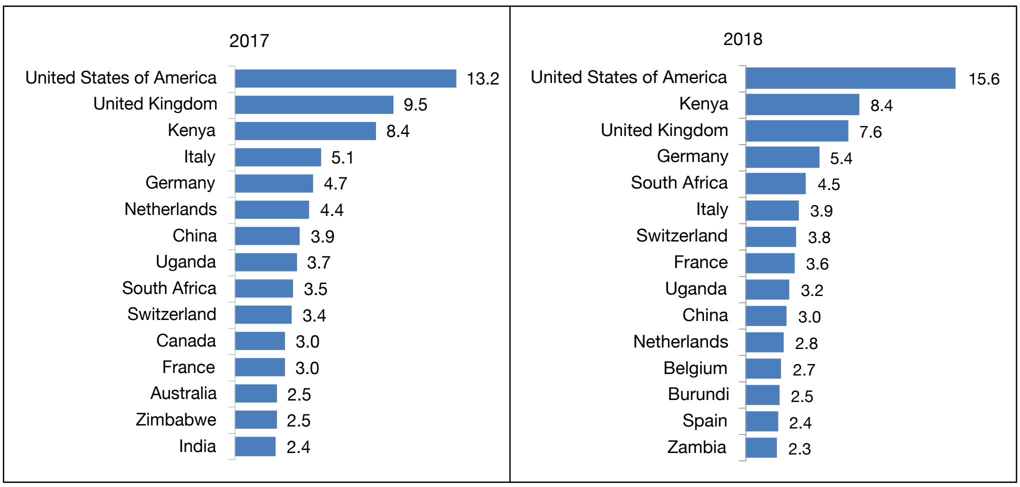
This chapter presents the key findings from the International visitors' exit survey conducted in 2018. The aspects covered include demographic characteristics of the visitors, purpose of visit and expenditure pattern. Other issues covered are the main tourism activities, visitors' impression and areas of improvement.

2.2 Source Markets

The survey results indicate that, the top 15 source markets to the United Republic of Tanzania accounted for 71.7 percent of total visitors. The largest number of visitors came from the United States of America, accounting for 15.6 percent, followed by Kenya with 8.4 percent and the United Kingdom with 7.6 percent. In 2018, the list of top 15 source markets has new entrants namely, Belgium, Burundi, Spain, and Zambia, replacing Canada, Australia India and Zimbabwe that appeared in the list of the top 15 source markets in 2017 (**Chart 2.1**).

Chart 2.1: Top 15 source markets for the URT, 2018

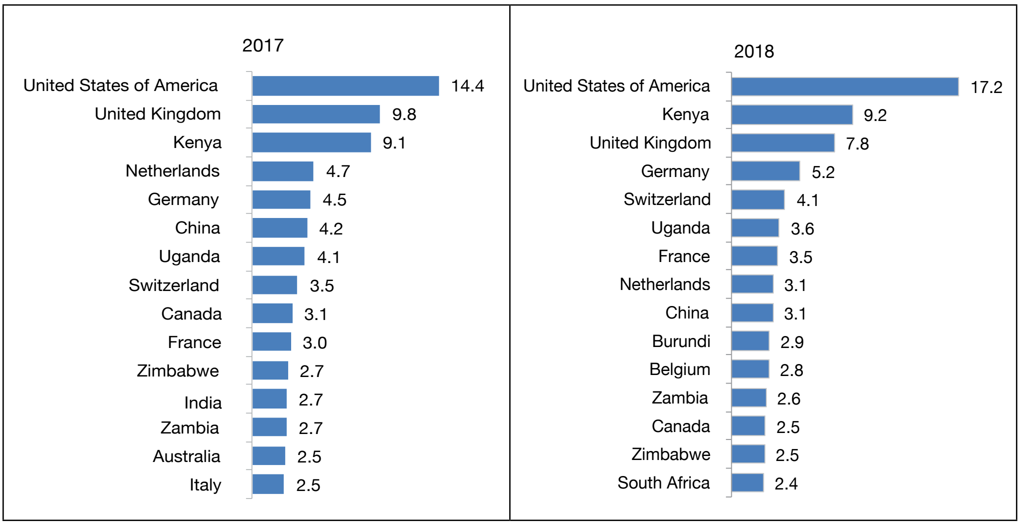
Percent



In Tanzania Mainland, the top 15 source markets accounted for 72.5 percent of the total visitors recorded during the survey. The United States of America, with 17.2 percent, led the top 15 source markets followed by Kenya and the United Kingdom (**Chart 2.2**). Burundi, Belgium and South Africa appeared in the top 15 source markets, replacing India, Australia and Italy that formed the 2017's top 15 source markets.

Chart 2.2: Top 15 source markets for Tanzania Mainland

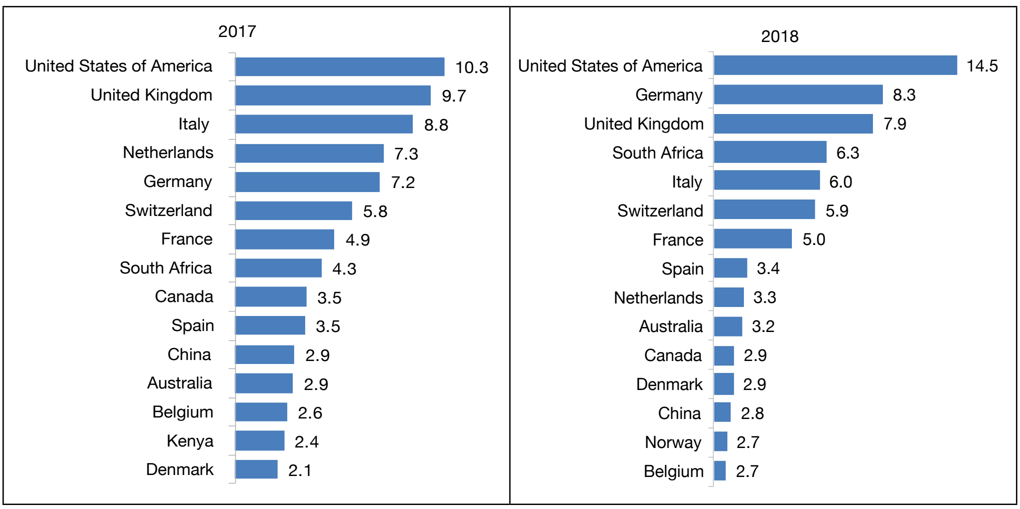
Percent



For the case of Zanzibar, the top 15 source markets accounted for 77.8 percent of the total visitors. The United States of American led by bringing more visitors, hence accounting for 14.5 percent, followed by Germany and the United Kingdom (**Chart 2.3**).

Chart 2.3: Top 15 source markets for Zanzibar

Percent

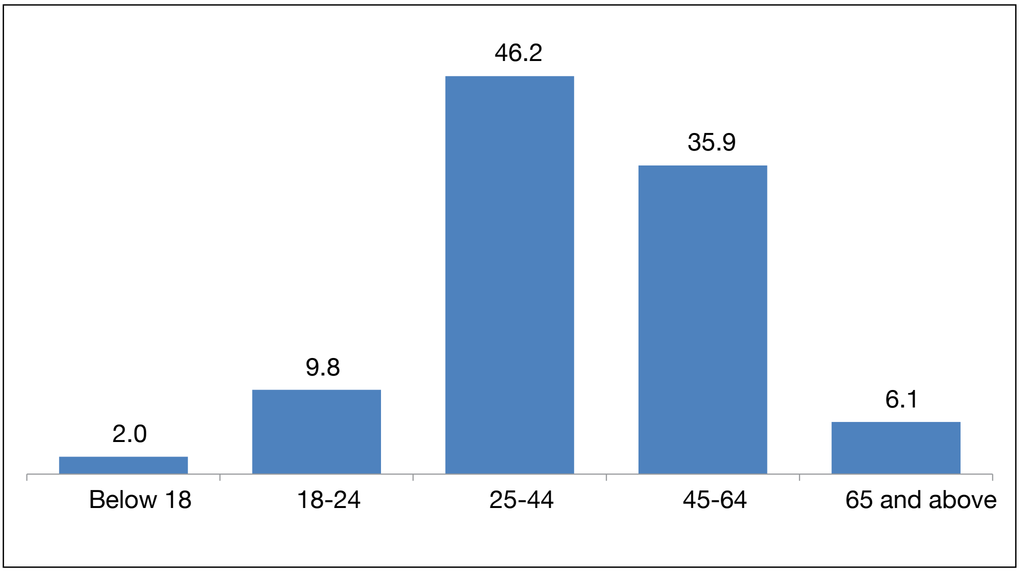


2.3 Age Group

The distribution pattern of visitors by age group shows that, visitors in the age group of 25-44 years took the lead, followed by those aged between 45 and 64. Visitors below 18 years accounted for the lowest share (**Chart 2.4**).

Chart 2.4: Distribution of visitors by age group, URT

Percent



The survey result further showed that, the share of senior citizens with 65 years of age and above increased to 6.1 percent in 2018 from 5.3 percent recorded in 2017. The increase partly reflects the effect of the ongoing improvement on the infrastructure that provides a friendly environment which attracts them to visit the country. On the other hand, the share of visitors below 18 years old has dropped from 2.7 percent, recorded in 2017, to 2.0 percent in 2018.

Based on the top 15 source markets, the survey results revealed that, the majority of the visitors in the age group of 25-44 years came from Kenya and the United States of America. The majority of the visitors in the age groups of 45-64 and above 65 years, came from the United States of America, while those of the age below 18 and age group 18-24, came from the United Kingdom and the United States of America (**Table 2.1**). The dominance of the United States of America and the United Kingdom was also observed in the preceding surveys.

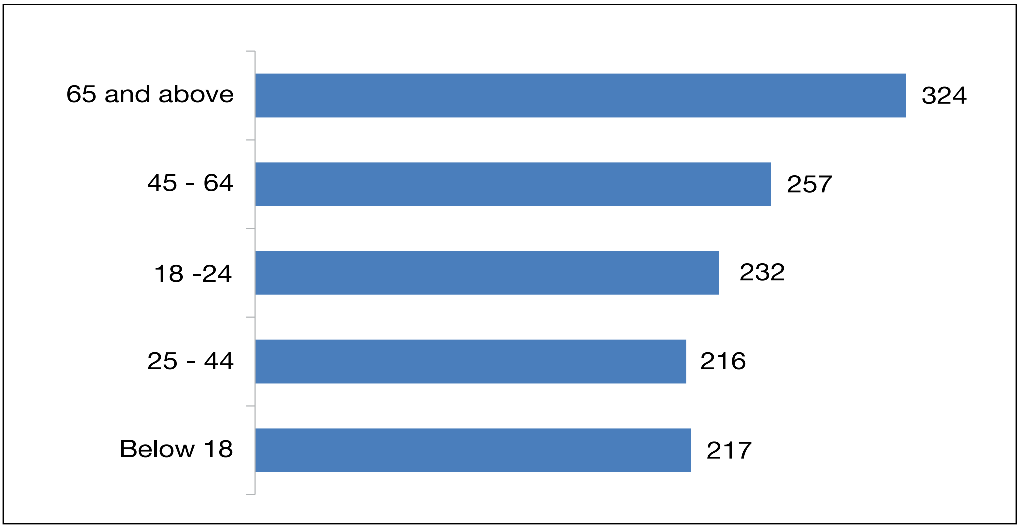
Table 2.1: Distribution of top 15 source markets by age group, URT, 2018

Percent

Country of residence	Age group: Below 18	18-24	25-44	45-64	65 and above
United States of America	23.3	21.3	15.5	22.9	56.8
Kenya	4.0	8.9	16.5	10.2	5.8
United Kingdom	23.4	14.0	6.5	10.4	7.7
Germany	9.7	6.4	5.8	9.5	8.0
South Africa	0.9	2.4	7.8	8.0	4.7
Italy	4.3	5.6	6.5	5.0	2.2
Switzerland	7.4	5.6	4.6	5.5	3.9
France	8.7	5.2	4.6	4.7	2.5
Uganda	0.8	3.1	7.0	3.7	1.1
China	2.2	2.5	5.1	5.0	1.9
Netherlands	6.8	7.1	2.2	4.3	1.8
Belgium	4.2	9.5	2.6	3.3	1.0
Burundi	2.0	4.1	4.9	2.2	1.6
Spain	1.7	2.6	4.7	2.8	0.7
Zambia	0.5	1.4	5.5	2.5	0.2
Total	100.0	100.0	100.0	100.0	100.0
Number of visitors	1,727.0	1,815.0	6,265.0	4,490.0	892.0

In addition, the survey findings reveal that visitors in the age group of 65 years and above had higher average expenditure, followed by those in the age group between 45 and 64 years (**Chart 2.5**).

Chart 2.5: Average expenditure by age group (*USD*)



Similar to the preceding surveys, leisure and holidays continued to be the main purpose of visit in all age groups from long haul source markets, while business and visiting friends and relatives were the main purposes of visit from the neighboring source markets (**Table 2.2**).

Table 2.2: Age group and purpose of visit, URT

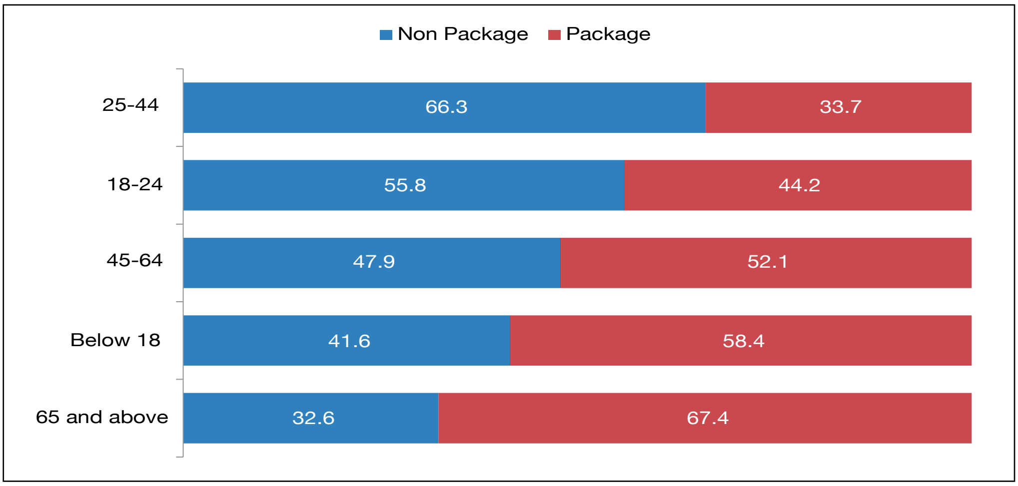
Percent

	Purpose of visit							
Age group	Business	Leisure and holidays	Meetings and conference	Religion	Scientific and academic	Visiting friends and relatives	Volunteering	Other
Below 18	0.7	67.4	0.5	0.9	0.0	12.4	17.1	0.9
18-24	4.2	59.7	3.5	0.6	1.0	18.9	9.1	3.0
25-44	12.7	55.6	6.6	0.4	1.0	18.4	1.5	3.8
45-64	6.9	69.3	5.4	0.6	0.6	12.8	1.8	2.6
65 and above	1.5	79.0	2.7	0.9	0.3	14.0	0.8	0.9

Chart 2.6 reveals that the majority of visitors in the age group of 18-24 and 25-44, came under the non-package tour arrangement while visitors in the age below 18 and above 64, had higher preference for package tour arrangement.

Chart 2.6: Tour arrangement by age group, URT

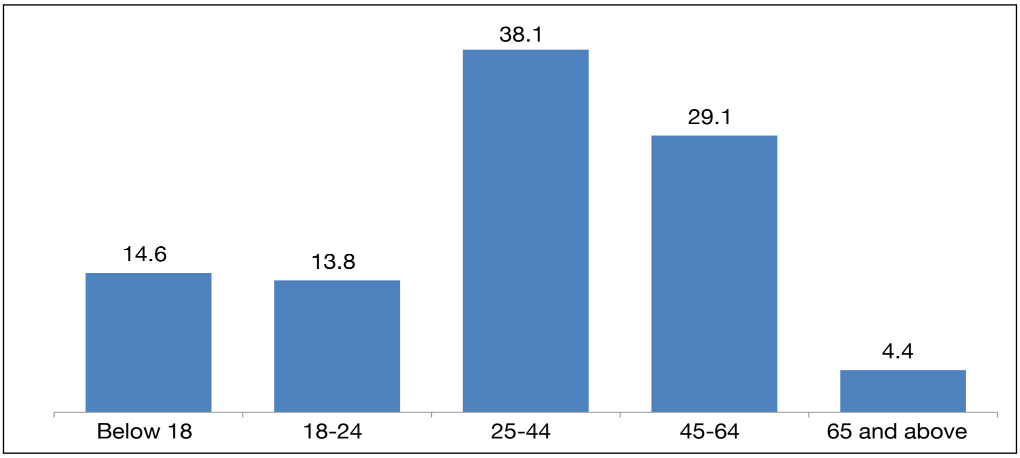
Percent



In Zanzibar, visitors in the age group of 25-44 years accounted for 38.1 percent of total visitors, followed by visitors with the age group between 45 and 64 years. Visitors who were 65 years old and above, accounted for the lowest share (**Chart 2.7**).

Chart 2.7: Distribution of visitors by age group, Zanzibar

Percent



The pattern of visitors by age group and purpose of visit observed in Zanzibar is similar to that of the URT (**Table 2.3**). This trend was also observed in the previous surveys.

Table 2.3: Age group and purpose of visit, Zanzibar

Percent

	Purpose of visit							
Age group	Leisure and holidays	Visiting friends and relatives	Business	Meetings and conference	Volunteering	Scientific and academic	Religion	Other
Below 18	86.0	9.0	0.3	0.1	4.0	0.0	0.0	0.6
18-24	82.7	7.5	1.0	0.4	6.6	0.8	0.1	0.7
25-44	85.9	7.5	1.7	2.2	1.8	0.2	0.1	0.6
45-64	90.5	5.8	1.3	1.7	0.3	0.3	0.0	0.1
65 and above	85.8	11.6	0.7	0.7	0.7	0.0	0.0	0.5

The survey results also revealed that, most visitors in the age group of 25-44 years mainly came from the United States of America and Italy, while those in the age group of 45-64 years mainly came from the United States of America and Germany (**Table 2.4**).

Table 2.4: Distribution of top 15 source markets by age group, Zanzibar, 2018

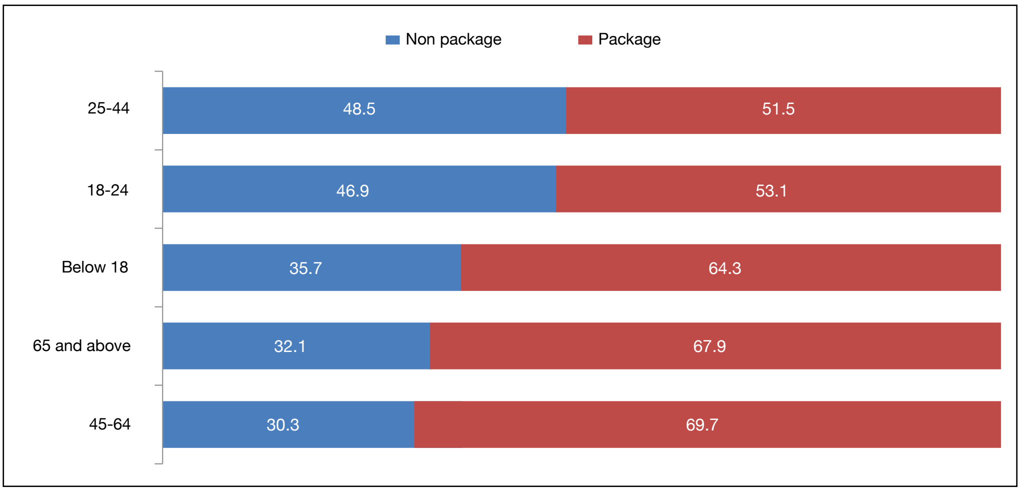
Percent

Country of residence	Age group				
	Below 18	18-24	25-44	45-64	65 and above
United States of America	16.5	13.3	14.4	15.9	33.2
United Kingdom	16.5	13.9	7.4	10.1	10.2
Germany	10.1	8.7	9.3	12.5	9.7
Italy	5.5	6.6	12.0	6.1	2.4
Switzerland	9.2	8.7	7.6	7.5	6.7
South Africa	1.3	4.0	9.6	9.1	7.8
France	10.5	6.5	7.0	6.8	4.3
Netherlands	7.6	9.4	3.2	5.4	2.7
Spain	1.7	2.6	7.9	3.9	0.5
Belgium	5.8	5.9	3.9	4.4	2.2
Denmark	3.9	8.5	3.4	4.0	3.8
Norway	4.7	4.2	3.9	4.1	2.7
China	2.4	1.6	4.5	3.2	1.3
Canada	3.0	3.7	3.0	3.4	3.2
Australia	1.2	2.7	2.9	3.7	9.2
Total	100.0	100.0	100.0	100.0	100.0
Number of visitors	1,159.0	1,003.0	2,853.0	2,328.0	371.0

The survey results further revealed that, the majority of visitors to Zanzibar in all age groups preferred package tour arrangement (**Chart 2.8**).

Chart 2.8: Tour arrangement by age group, Zanzibar

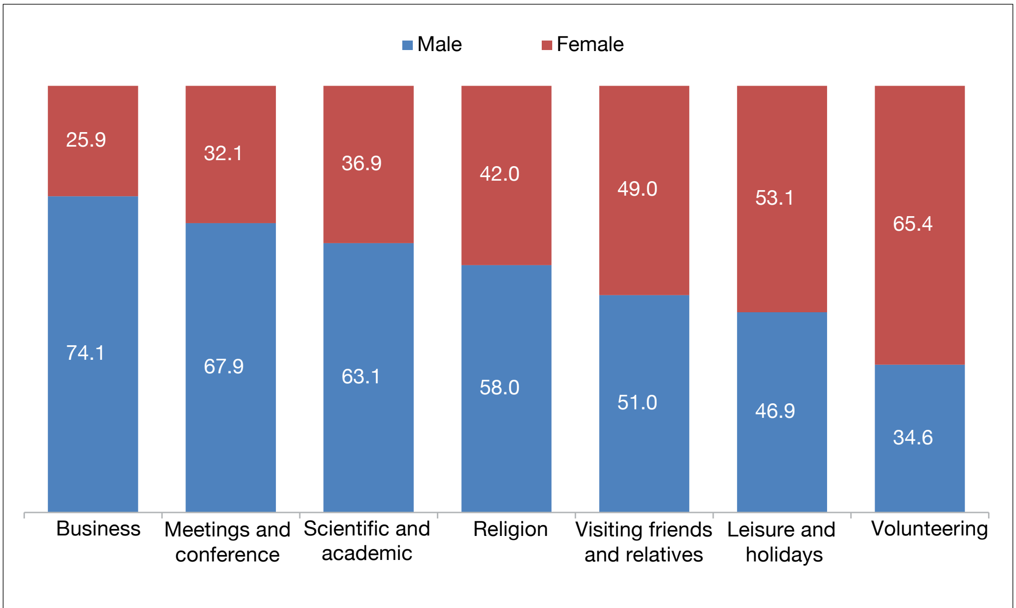
Percent



2.4 Gender

In 2018, the distribution of visitors by gender depicted a similar pattern to the preceding surveys with more or less the same number of males and females. Female visitors mostly came for volunteering; and leisure and holidays, while male visitors were dominant under business; and meetings and conferences (**Chart 2.9**).

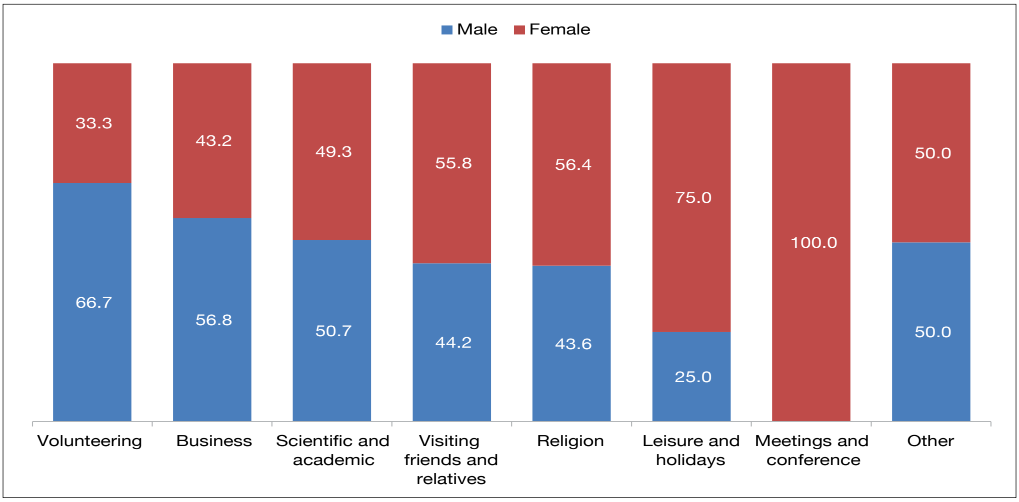
Chart 2.9: Gender by purpose of visit, URT



In Zanzibar, the results indicate that female visitors were dominant, accounting for 55.9 percent of total visitors who mainly came for the purposes of meetings and conferences, leisure and holidays. Meanwhile, more males came for volunteering and business (**Chart 2.10**).

Chart 2.10: Gender by purpose of visit, Zanzibar

Percent

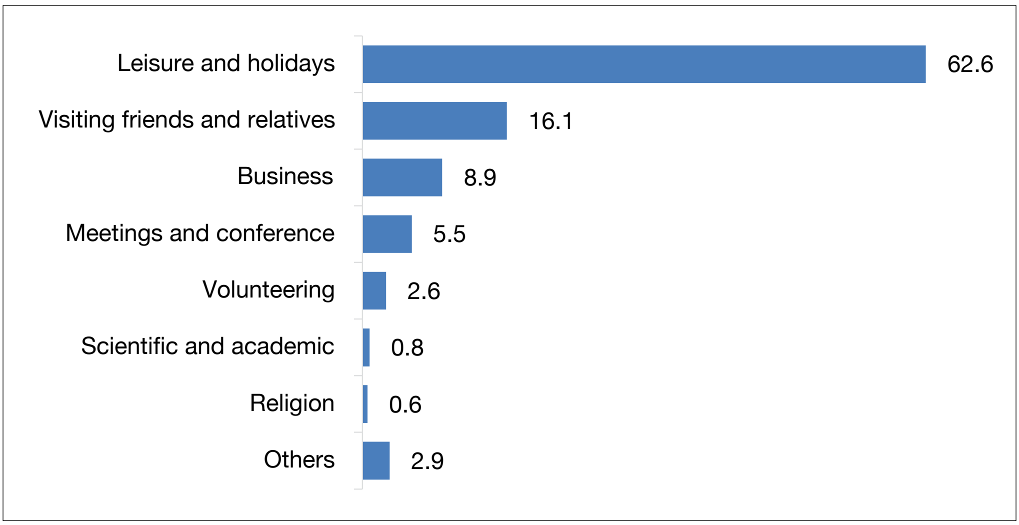


2.5 Purpose of Visit

The majority of international visitors to Tanzania who came for leisure and holidays accounted for 62.6 percent, followed by those who came to visit friends and relatives. The prominence of leisure and holidays is attributed to the country's wide range of tourist products which include, wildlife, white sandy beaches, historical sites and mountain climbing. Visitors who came for religious purposes were few (**Chart 2.11**).

Chart: 2.11 Purpose of visit, United Republic of Tanzania, 2018

Percent



The United States of America was the leading source market for tourists visiting URT for leisure and holidays; and scientific and academic purposes. The majority of visitors from Kenya visited friends and relatives, while those from the United Kingdom came mainly for volunteering activities. It is worth noting that the majority of visitors who came to visit friends and relatives were from the neighboring countries (**Table 2.5**).

Table 2.5: Distribution of top 15 source markets by purpose of visit, URT

Percent

Country of residence	Purpose of visit: Leisure and holidays	Visiting friends and relatives	Meetings and conference	Volunteering	Business	Scientific and academic	Others	Religion	Total
United States of America	18.7	11.4	12.6	21.3	3.8	24.6	5.1	18.6	15.6
Kenya	2.4	23.1	21.6	0.4	12.8	12.6	20.9	18.6	8.4
United Kingdom	8.6	6.0	3.5	26.8	1.9	3.0	5.1	0.0	7.6
Germany	7.1	3.5	0.9	1.4	2.3	3.0	0.5	12.7	5.4
South Africa	4.3	1.5	13.2	0.2	9.1	1.8	0.5	0.0	4.5
Italy	5.5	1.4	0.9	4.5	0.5	0.0	3.1	0.0	3.9
Switzerland	5.5	1.2	0.4	2.0	0.3	0.6	0.2	0.0	3.8
France	5.1	1.4	1.6	0.5	0.9	0.6	0.5	0.0	3.6
Uganda	0.4	8.3	5.8	0.0	5.3	19.8	21.7	8.5	3.2
China	3.5	1.2	4.6	0.9	3.6	2.4	0.6	0.0	3.0
Netherlands	4.1	1.0	0.8	0.0	0.7	0.6	0.2	0.0	2.8
Belgium	3.5	0.9	6.0	0.2	0.2	0.0	0.0	0.0	2.7
Burundi	0.5	8.3	0.9	0.4	3.4	9.0	13.1	5.1	2.5
Spain	3.3	0.4	0.3	6.7	0.5	0.0	0.3	0.0	2.4
Zambia	0.2	1.4	0.9	0.0	18.7	1.2	7.6	0.0	2.3

In Tanzania Mainland, over half of the visitors came for leisure and holidays. A similar pattern was observed for the United Republic of Tanzania (**Chart 2.12**). Majority of the visitors from the United States of America came for scientific and academic purposes, while those from Kenya and the United Kingdom came to visit friends and relatives and volunteering work, respectively (**Table 2.6**).

Chart 2.12: Purpose of visit Tanzania Mainland

Percent

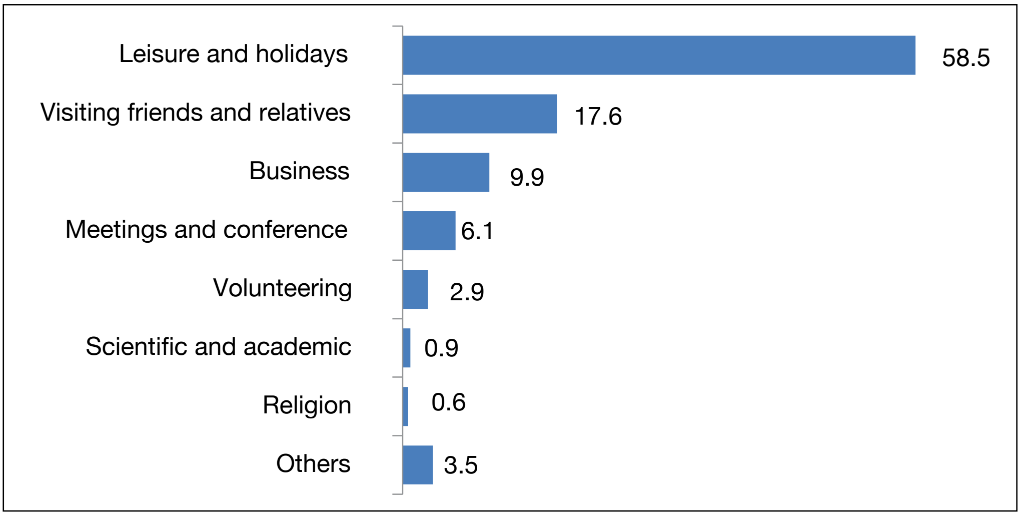


Table 2.6: Top 15 source markets by purpose of visit, Tanzania Mainland, 2018

Percent

Country of residence	Purpose of visit								
	Leisure and holidays	Visiting friends and relatives	Meetings and conference	Volunteering	Business	Scientific and academic	Religion	Others	Total
United States of America	22.0	11.3	13.0	21.8	3.8	25.0	18.8	5.2	17.2
Kenya	2.3	24.0	22.0	0.2	12.9	12.8	18.8	21.0	9.2
United Kingdom	9.1	6.1	3.5	27.0	1.9	1.2	0.0	5.2	7.8
Germany	7.2	3.3	1.0	1.3	2.2	3.0	12.8	0.5	5.2
Switzerland	6.3	1.3	0.4	2.0	0.3	0.6	0.0	0.2	4.1
Uganda	0.4	8.7	5.8	0.0	5.3	20.1	8.5	21.8	3.6
France	5.3	1.2	1.6	0.2	0.9	0.6	0.0	0.5	3.5
Netherlands	4.8	1.0	0.8	0.0	0.8	0.6	0.0	0.2	3.1
China	3.9	1.3	3.5	0.9	3.5	2.4	0.0	0.6	3.1
Burundi	0.6	8.7	0.8	0.4	3.5	9.1	5.1	13.1	2.9
Belgium	3.9	0.7	6.1	0.2	0.2	0.0	0.0	0.0	2.8
Zambia	0.2	1.5	1.0	0.0	19.1	1.2	0.0	7.7	2.6
Canada	2.6	2.6	0.6	11.1	0.1	7.3	15.4	0.5	2.5
Zimbabwe	0.5	1.5	1.3	0.0	16.4	0.0	1.7	6.6	2.5
South Africa	1.0	1.3	12.8	0.2	8.0	1.8	0.0	0.5	2.4

Note: The total represents the country share regadless of the purpose of visit

In Zanzibar, the majority of visitors came for leisure and holidays and were mainly from the United States of America, Germany, the United Kingdom and Italy (**Chart 2.13**). Those who came for scientific and academic; and volunteering purposes were from the United States of America and the United Kingdom respectively (**Table 2.7**).

Chart 2.13: Purpose of visit Zanzibar, 2018

Percent

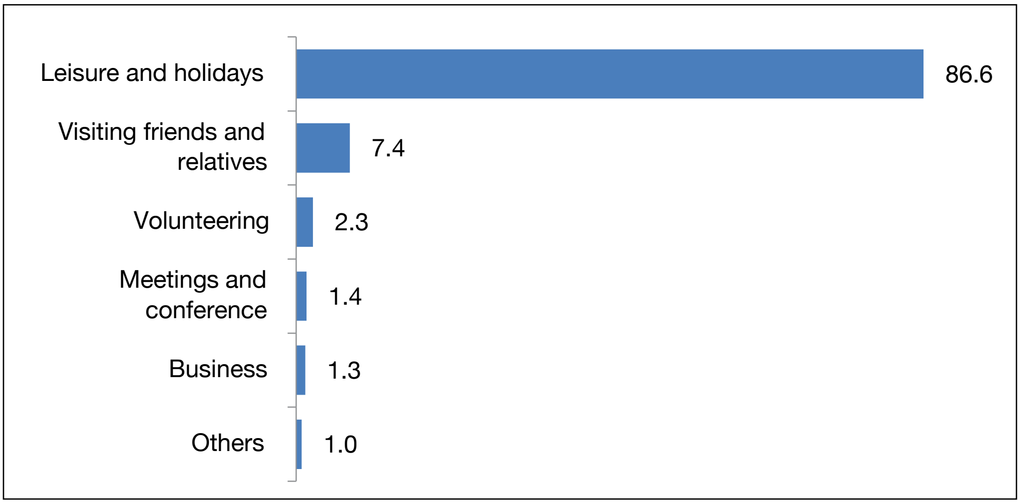


Table 2.7: Distribution of top 15 source markets by purpose of visit, Zanzibar

Percent

	Purpose of visit								
Country of residence	Leisure and holidays	Visiting friends and relatives	Volunteering	Meetings and conference	Scientific and academic	Business	Religion	Others	Total
United States of America	12.0	16.7	15.1	19.4	55.6	11.5	0.0	4.3	12.6
United Kingdom	7.7	9.7	30.2	2.9	14.8	3.3	0.0	27.7	8.4
Germany	8.5	9.3	1.3	0.0	0.0	2.5	0.0	0.0	8.2
Italy	7.0	2.2	0.9	2.2	0.0	0.0	0.0	27.7	6.4
Switzerland	6.9	1.5	4.4	0.7	0.0	1.6	0.0	2.1	6.3
South Africa	6.0	1.9	0.4	13.7	0.0	22.1	0.0	0.0	5.9
France	6.3	2.9	0.9	2.9	0.0	3.3	0.0	0.0	5.8
Netherlands	4.6	2.8	0.0	0.0	0.0	2.5	0.0	0.0	4.2
Spain	3.8	1.1	10.7	1.4	0.0	4.1	0.0	2.1	3.7
Belgium	3.9	2.4	0.0	0.7	0.0	1.6	0.0	0.0	3.6
Denmark	3.6	3.5	1.8	1.4	0.0	0.0	0.0	0.0	3.4
Norway	3.3	4.9	0.0	0.7	0.0	0.0	0.0	0.0	3.2
China	2.5	1.8	0.0	13.7	3.7	7.4	0.0	4.3	2.6
Canada	2.2	5.1	8.4	2.2	0.0	0.8	0.0	0.0	2.6
Australia	2.7	0.7	1.3	0.7	0.0	0.0	33.0	0.0	2.5

Note: The total represents the country share regadless of the purpose of visit

2.6 Travel Arrangement

The survey findings show that 55.1 percent of the tourists who visited URT came under the non-package travel arrangement (**Chart 2.14**). The neighbouring countries (Burundi, Zambia, Uganda and Kenya) ranked high in the non-package travel arrangement. Those from long haul such as Belgium, France, Italy and Switzerland, mainly came under the package tour arrangement (**Table 2.8**).

Table 2.8: Visitors by tour arrangement, URT

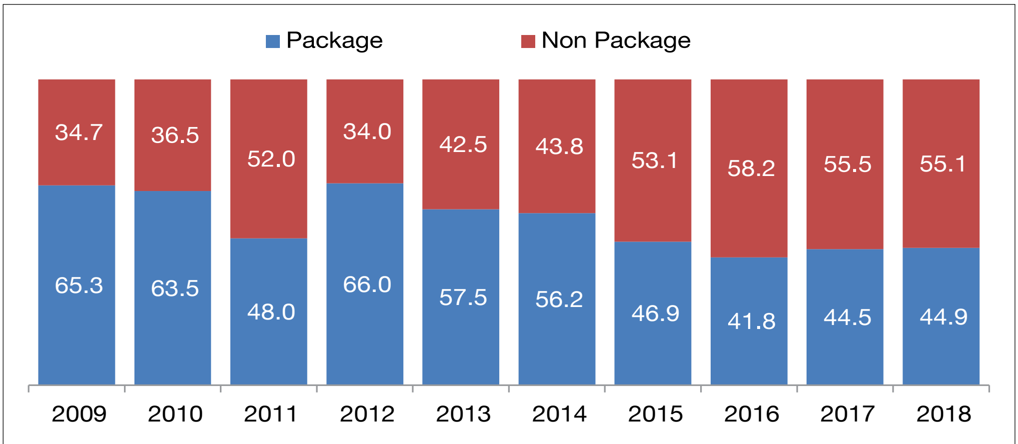
Percent

	Travel arrangement	
Top 15 source markets	Non Package	Package
United States of America	40.0	60.0
Kenya	93.5	6.5
United Kingdom	47.4	52.6
Germany	38.0	62.0
South African	45.0	55.0
Italy	33.1	66.9
Switzerland	35.6	64.4
France	31.8	68.2
Uganda	98.4	1.6
China	49.7	50.3
Netherlands	36.5	63.5
Belgium	21.6	78.4
Burundi	99.4	0.6
Spain	38.5	61.5
Zambia	98.8	1.2

In the last ten years, package tour has been the dominant form of travel arrangement. However, from year 2015, the pattern has been changing with increased non-package tour arrangement. This phenomenon is attributed to increased use of information technology in travel and tourism, improved quality of services and easy access to destination Tanzania (**Chart 2.14**).

Chart 2.14: Visitors by tour arrangement, URT

Percent



In Zanzibar, 59.6 percent of the visitors came under the package tour arrangement, largely explained by the longhaul nature of the source markets and prominence of investments in accommodation establishments from the countries concerned. South Africa and Denmark led by bringing more visitors under the package and non-package tour arrangements, respectively (**Table 2.9**).

Table 2.9: Proportion of visitors of top 15 source markets by travel arrangement, Zanzibar

Percent

	Travel arrangement	
Country of residence	Non Package	Package
United States of America	44.0	56.0
United Kingdom	45.0	55.0
Germany	30.7	69.3
Italy	24.1	75.9
Switzerland	30.6	69.4
South Africa	18.4	81.6
France	30.1	69.9
Netherlands	39.6	60.4
Spain	37.5	62.5
Belgium	25.4	74.6
Denmark	52.5	47.5
Norway	35.4	64.6
China	52.0	48.0
Canada	44.6	55.4
Australia	38.4	61.6

Visitiors who came for leisure and holidays preferred package tour arrangement, while those who came for business, visiting friends and relatives, meetings and conferences preferred non-package tour arrangements (**Table 2.10**). The same observation was made for Tanzania Mainland and Zanzibar.

Table 2.10: Distribution of visitors by tour arrangement and purpose of visit

Percent

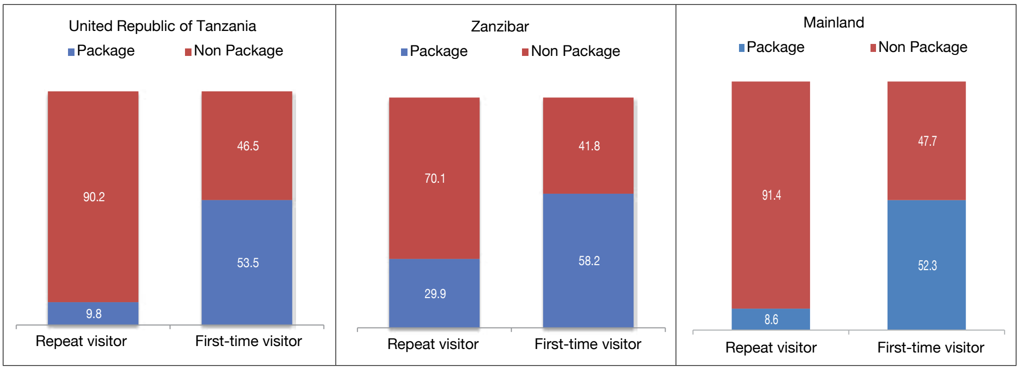
Purpose of visit	URT		Mainland		Zanzibar	
	Non Package	Package	Non Package	Package	Non Package	Package
Business	94.5	5.5	95.6	4.4	70.4	29.6
Leisure and holidays	34.5	65.5	34.1	65.9	35.3	64.7
Meetings and conference	85.1	14.9	86.9	13.1	73.4	26.6
Religion	90.1	9.9	90.1	9.9	100.0	0.0
Scientific and academic	96.9	3.1	96.9	3.1	80.6	19.4
Visiting friends and relatives	94.2	5.8	95.4	4.6	80.3	19.7
Volunteering	64.9	35.1	65.1	34.9	56.4	43.6
Other	94.5	5.5	94.5	5.5	57.1	42.9

2.7 First-Time and Repeat Visit

The survey results reveal that 54.0 percent of the interviewed visitors came to URT for the first time and used package tour arrangements. The majority of repeat visitors (46.0 percent) came under the non-package tour arrangement. A similar pattern was also observed in Tanzania Mainland and Zanzibar for both first-time and repeat visitors (**Chart 2.15**).

Chart 2.15: First-time and repeat visitors by tour arrangements

Percent



The majority of first time visitors to URT were from Spain, Belgium, Italy, France, China, Switzerland and Germany, with more than 75.0 percent each. Visitors from the neighbouring countries (Uganda, Kenya, Zambia and Burundi) demonstrated repeat visits, a pattern consistent with proximity to URT (**Chart 2.16**). The majority of the first-time visitors were holidaymakers, while repeat visitors came for business and visiting friends and relatives (**Table 2.11**).

Chart 2:16: First-time and repeat visitors by top 15 source markets, URT

Percent

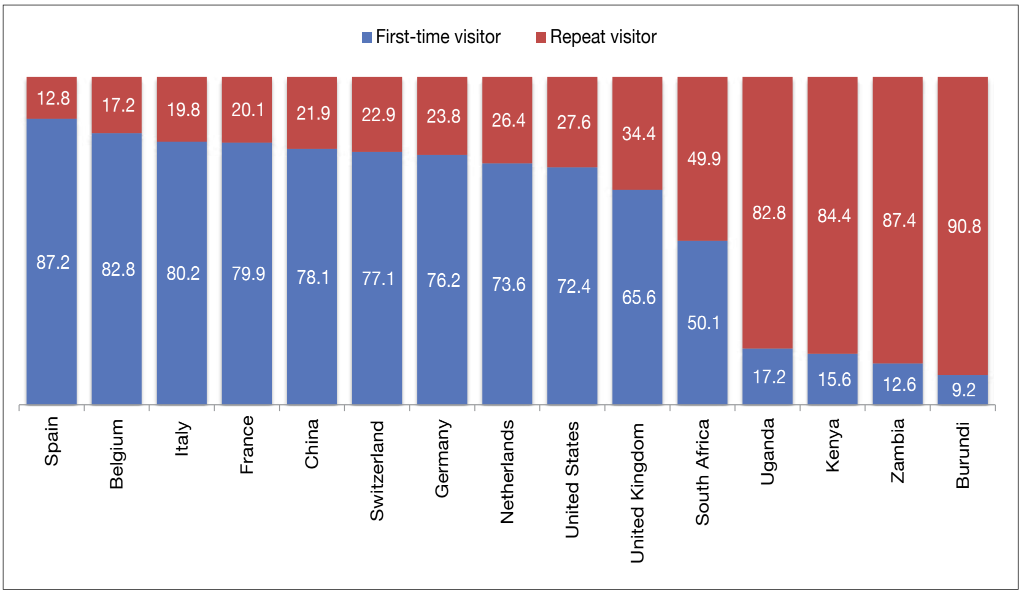


Table 2.11: First-time and repeat visitors by purpose of visit, URT

Percent

Purpose of visit	First-time visitors	Repeat visitors
Leisure and holidays	75.4	21.5
Visiting friends and relatives	8.1	34.4
Business	5.9	23.4
Meetings and conference	5.3	11.7
Volunteering	3.0	0.9
Other	1.3	5.5
Scientific and academic	0.8	1.8
Religion	0.3	0.8
Total	100.0	100.0

In Zanzibar, the majority of visitors in the top 15 source markets came for the first time (**Chart 2.17**). Leisure and holidays was the main purpose of visit for both first- time and repeat visitors (**Table 2.12**).

Chart 2.17: First-time and repeat visitors by top 15 source markets, Zanzibar

Percent

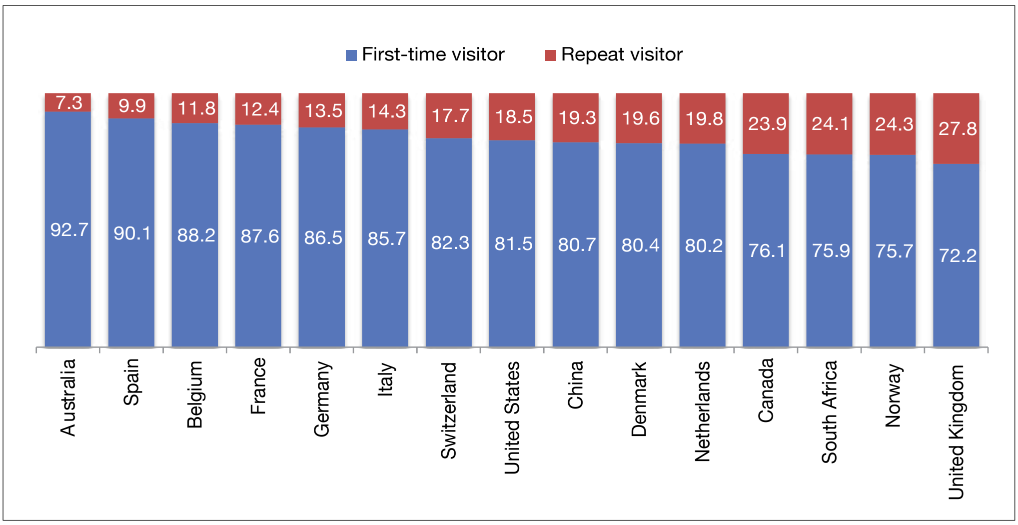


Table 2.12: First-time and repeat visitors by purpose of visit, Zanzibar

Percent

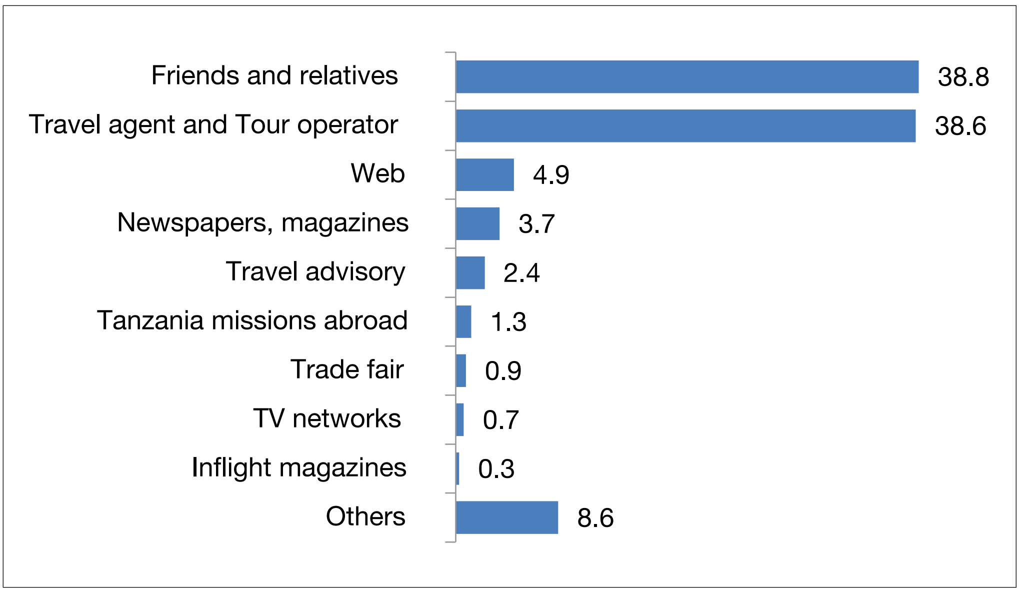
Purpose of visit	First-time visitors	Repeat visitors
Leisure and holidays	90.3	60.7
Visiting friends and relatives	4.3	24.3
Volunteering	1.7	1.2
Meetings and conference	1.7	6.1
Business	1.2	5.6
Scientific and academic	0.5	0.7
Other	0.3	1.2
Religion	0.0	0.3
Grand Total	100.0	100.0

2.8 Source of Information

The major source of information about destination Tanzania was word of mouth from friends and relatives. Also, tour operators and travel agents were the most important source of information for visitors coming to Tanzania (**Chart 2.18**).

Chart 2.18: Source of information

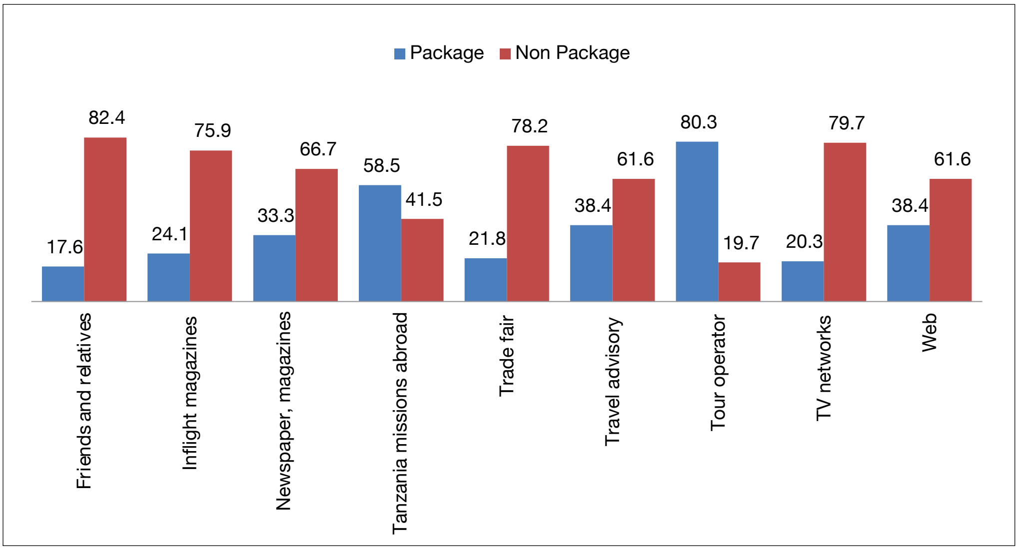
Percent



The survey's findings depict that visitors who received information from friends and relatives mainly came under non-package tour arrangement, which accounted for 82.4 percent. Visitors who heard about Tanzania through tour operators mainly came under the package tour arrangement (**Chart 2.19**).

Chart 2.19: Source of information by tour arrangement, URT

Percent



2.9 Travel Party

The survey results show that, 58.0 percent of the respondents travelled alone while 15.0 percent travelled with spouses (**Chart 2.20**). This is consistent with results of 2017 when analysed across age groups, respondents who travelled alone, continued to lead (**Table 2.13**).

Chart 2.20: Travel party, URT

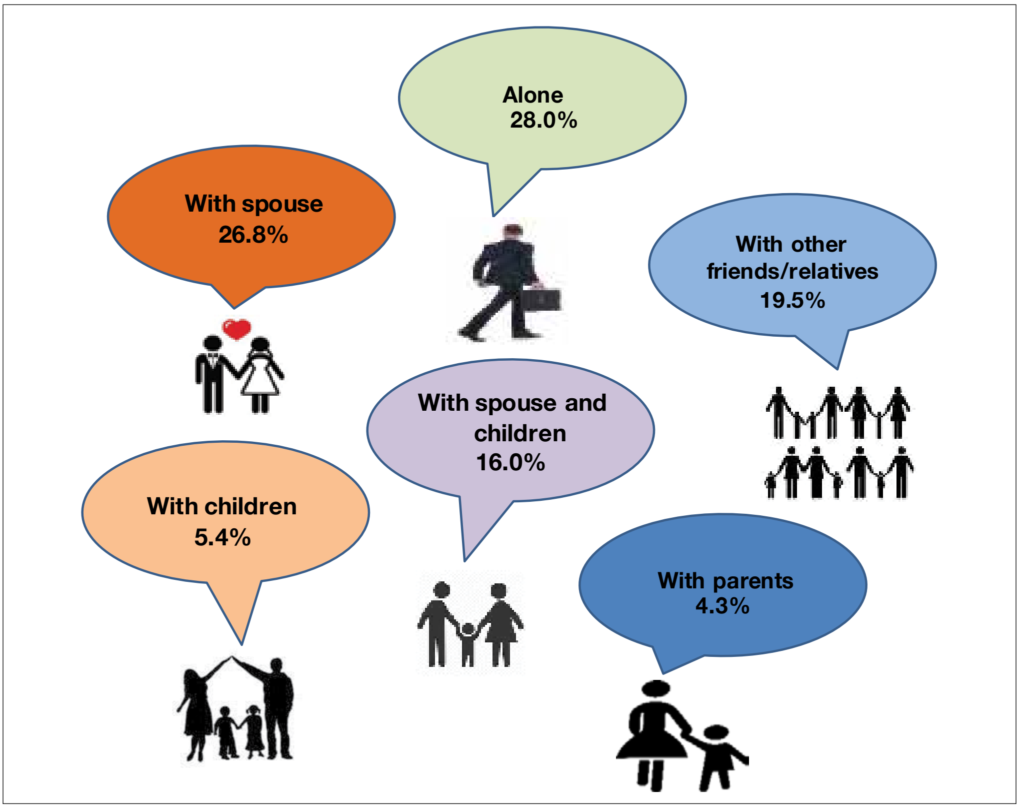
Table 2.13: Travel party by age group, URT

Percent

Travel party	Age group <18	18-24	25-44	45-64	65+	% of the total
Alone	69.2	65.7	63.4	49.1	42.4	58.0
With children	0.5	1.2	2.5	6.7	3.2	3.7
With other friends/relatives	11.3	16.5	14.1	10.6	9.0	12.9
With parents	18.5	9.8	1.9	0.9	0.7	2.5
With spouse	0.0	5.0	13.8	16.6	37.6	15.0
With spouse and children	0.5	1.8	4.4	16.0	7.1	7.9
Total	100	100	100	100	100	100

In Zanzibar, visitors who came alone were the majority, followed by those who came with spouses (**Chart 2.21**).

Chart 2.21: Travel party, Zanzibar



2.10 Departure Points

The results show that 82.9 percent of the visitors departed through international airports, particularly JNIA, AAKIA and KIA (**Table 2.14**). The dominance of JNIA is largely explained by the fact that Dar es Salaam is the commercial hub for Tanzania and departure point for most of the international airlines. Namanga, Tunduma and Horohoro were the leading land border departure posts. In terms of purpose of visits, most visitors who departed through international airports came for leisure and holidays, while the majority of visitors who departed through land border posts mainly came for business and visiting friends and relatives.

Table 2.14: The number of visitors by departure points, URT

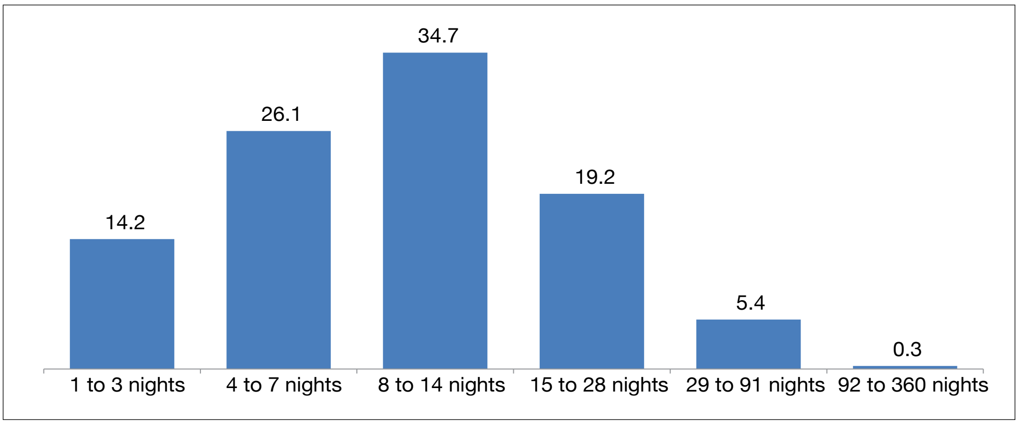
Departure points	Visitors	Percent
Julius Nyerere International Airport (JNIA)	24,773	47.5
Abeid Amani Karume International Airport (AAKIA)	13,669	26.2
Kilimanjaro International Airport (KIA)	4,815	9.2
Namanga (NAM)	3,139	6.0
Tunduma (TUN)	1,699	3.3
Horohoro (HOR)	1,538	3.0
Mutukula (MTK)	1,505	2.9
Manyovu (MNY)	978	1.9
Total	52,116	100

2.11 Nights Spent

The survey findings show that about one third of the visitors to URT spent between 8 and 14 nights, followed by visitors who spent between 4 and 7 nights. A small number of visitors stayed for more than 29 nights (**Chart 2.22**).

Chart 2.22: Distribution of visitors by nights spent, URT

Percent



The findings show that 41.7 percent of the visitors who attended meetings and conferences spent between 4 and 7 nights, while 41.1 percent of business visitors spent between 1 and 3 nights. Similarly, about 44.0 percent of leisure and holidays visitors spent between 8 to 14 nights (**Table 2.15**). A similar pattern was observed in Tanzania Mainland.

Table 2.15: Distribution of visitors by the nights spent and purpose of visit, URT

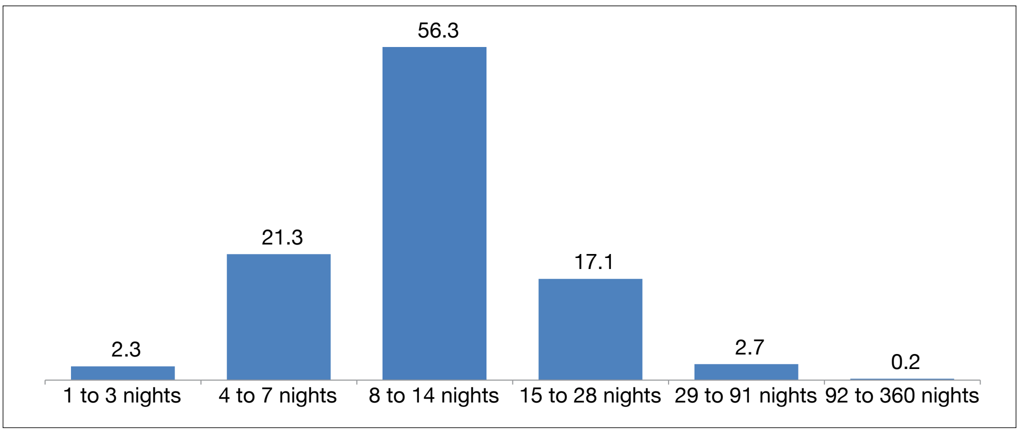
Percent

Nights spent	Business	Leisure and holidays	Meetings and conference	Visiting friends and relatives	Volunteering	Religion	Scientific and academic	Other
	Purpose of visit							
1 to 3	41.1	6.3	28.6	20.9	1.6	17.8	10.8	49.9
4 to 7	31.5	25.8	41.7	23.0	2.9	15.3	24.1	26.7
8 to 14	13.3	44.2	18.1	21.0	27.5	39.0	17.5	12.3
15 to 28	5.5	21.2	9.3	20.7	42.9	20.3	23.5	6.1
29 to 91	7.8	2.3	2.2	13.7	24.6	7.6	19.3	3.7
92 to 360	0.9	0.1	0.2	0.7	0.4	0.0	4.8	1.2
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

In the case of Zanzibar, more than half of the visitors spent between 8 to 14 nights, followed by those who spent between 4 to 7 nights. The proportion of visitors who spent more than a month accounted for 2.9 percent (**Chart 2.23**).

Chart 2.23: Distribution of visitors by nights spent, Zanzibar

Percent



2.12 Average Length of Stay

The overall average length of stay for visitors to URT in 2018 was 10 nights, same as the nights recorded in 2017. Visitors who came to visit friends and relatives stayed the longest, with an average length of stay of 11 nights, followed by leisure and holiday makers who stayed for 10 nights. Business visitors stayed the shortest, with an average of 8 nights (**Table 2.16**).

Table 2.16: Average length of stay by purpose of visit and top 15 source markets, URT

Country of residence	Business	Leisure and holidays	Visiting friends and relatives	Other	Average
United States of America	9	11	14	13	12
Kenya	5	5	6	6	6
United Kingdom	7	12	13	16	12
Germany	9	14	17	15	14
South Africa	5	7	6	10	7
Italy	6	9	12	9	9
Switzerland	8	14	18	19	15
France	7	12	12	13	11
Uganda	6	6	7	5	6
China	7	8	10	16	10
Netherlands	10	14	15	7	12
Belgium	18	14	13		15
Burundi	4	6	6	3	5
Spain	11	11	13	15	13
Zambia	5	6	6	7	6
Average	8	10	11	11	10

Visitors from Switzerland and Belgium stayed for an average of 15 nights, followed by those from Germany and Spain who stayed for 14 and 13 nights respectively. This is partly attributed to the fact that the majority of visitors from these countries are holiday makers. On the other hand, visitors from neighbouring countries, namely Burundi, Uganda, Zambia and Kenya, stayed for the shortest period as most of them came for business.

In Zanzibar, the average length of stay was 6 nights, the same as 2017. Visitors who stayed the longest were holiday makers and those visiting friends and relatives. However, visitors under the business category stayed shortest with an average of 4 nights. Visitors from Denmark stayed the longest, with an average of 11 nights, followed by visitors from France and Germany, who spent an average of 9 and 7 nights, respectively (**Table 2.17**).

Table 2.17: Length of stay by purpose of visit and top 15 source markets, Zanzibar

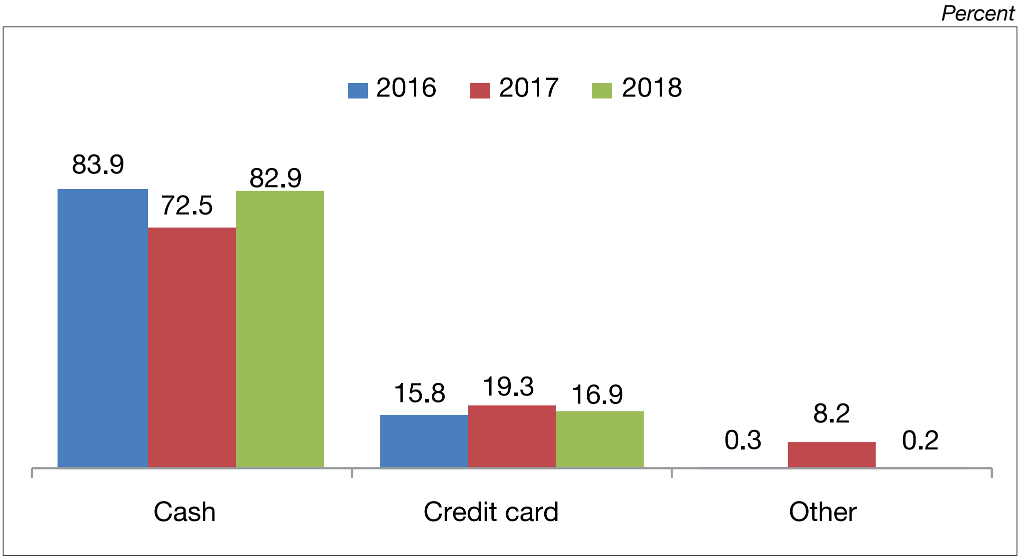
Percent

Country of residence	Business	Leisure and holidays	Visiting friends and relatives	Other	Average
United States of America	4	4	4	4	4
United Kingdom	4	6	6	7	6
Germany	7	7	8	4	7
Italy	3	7	7	2	5
Switzerland	6	7	5	5	6
South Africa	5	6	5	7	6
France	2	6	7	21	9
Netherlands	2	6	5		4
Spain	3	5	10	7	6
Belgium	5	7	5		6
Denmark	6	8	7	21	11
Norway	5	8	6		6
China	5	4	4	3	4
Canada	2	5	5	4	4
Australia	5	6	3	5	5
Average	4	6	6	8	6

2.13 Mode of Payment

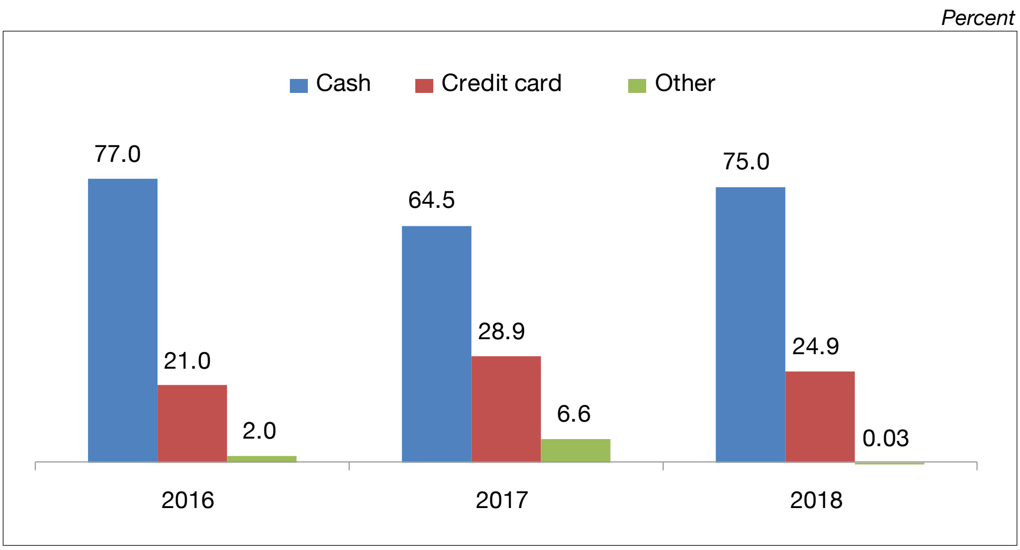
The survey findings show that 82.9 percent of the interviewed visitors settled their bills through cash, while 16.9 percent paid through credit cards (**Chart 2.24**). The prominence of cash payments is partly associated with the nature of the country's economy, which is cash based as well as limited payment system infrustructure.

Chart 2.24: Mode of payment, URT



In the case of Zanzibar, the dominance of cash payments was also observed, with 75.0 percent of interviewed visitors settling their bills through cash, while 24.9 percent paid through credit cards (**Chart 2.25**).

Chart 2.25: Mode of payment, Zanzibar

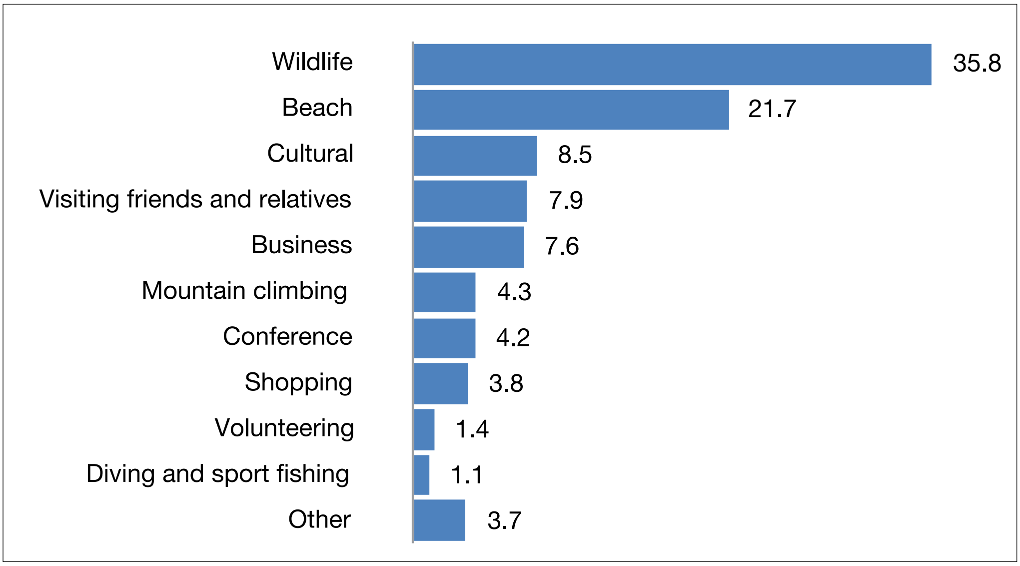


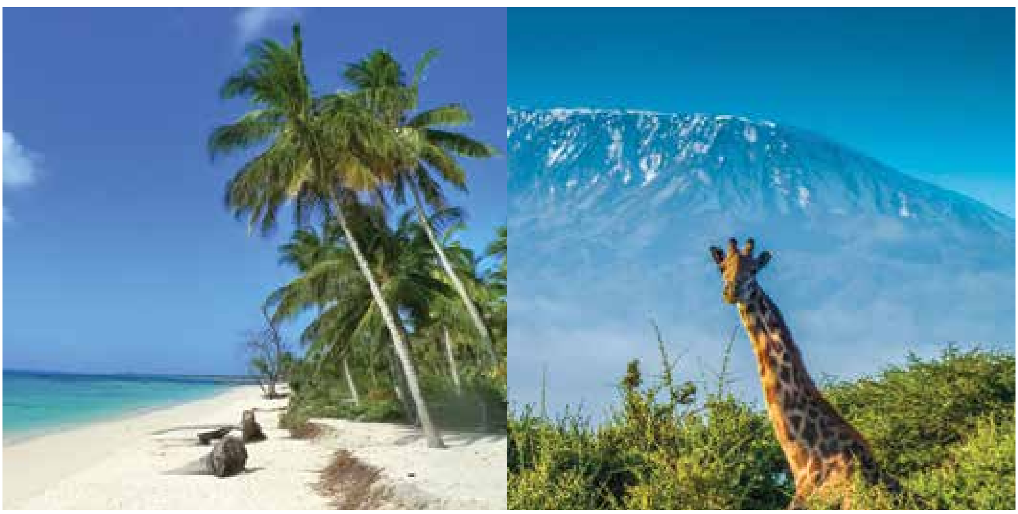
2.14 Main Tourism Activities

Tanzania is endowed with various tourist attractions that offer a wide range of tourism activities. Wildlife-based tourism was the most attractive activity for tourists, accounting for one-third of the total visitors. Other major tourism activities were beach, cultural, business, mountain climbing, shopping and conference (**Chart 2.26**).

Chart 2.26: Main tourism activities in URT

Percent





Beautiful attractions

Visitors who came for business, conferences and cultural tourism mainly used non-package tour arrangement and were from neighbouring countries (**Chart 2.27**). On the other hand, visitors who came for mountain climbing, game safaris and beach tourism mainly traveled under package tour arrangements (**Table 2.18**).

Chart 2.27: Tourism activity and travel arrangement, URT

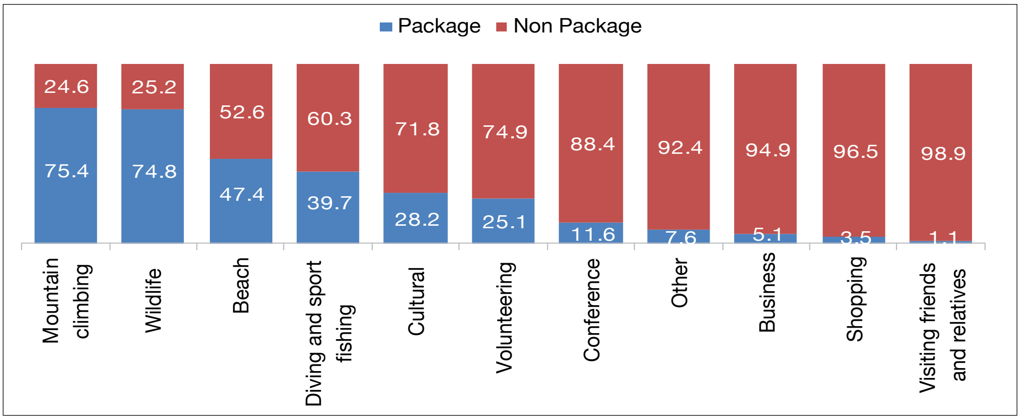


Table 2.18: Tourism activities by top 15 source markets, URT

Percent

Country of residence	Tourism activities									
	Beach	Business	Conference	Cultural	Diving and sport fishing	Mountain climbing	Shopping	Wildlife	Other	Total
United States of America	10.2	2.3	3.4	9.5	0.1	8.9	0.9	53.9	10.9	100
Kenya	13.5	11.0	10.6	2.6	0.7	1.2	8.5	2.4	49.4	100
United Kingdom	22.1	2.0	1.7	14.0	1.1	9.1	0.7	35.2	14.1	100
Germany	27.6	2.1	1.0	7.9	0.8	4.1	0.2	49.3	7.1	100
South Africa	49.1	15.0	8.0	3.2	4.1	0.1	6.3	5.4	8.9	100
Italy	53.4	1.2	0.5	7.7	1.1	2.0	0.1	26.8	7.2	100
Switzerland	17.7	0.5	0.5	6.1	1.3	5.5	0.0	64.7	3.8	100
France	24.7	3.1	1.0	4.9	1.2	2.6	0.4	57.9	4.0	100
Uganda	10.9	11.1	8.0	1.6	0.3	0.0	4.1	0.1	63.8	100
China	18.6	5.9	4.7	4.2	0.3	3.9	4.0	53.3	5.1	100
Netherlands	12.9	2.3	0.0	6.0	0.2	4.3	0.0	71.2	3.0	100
Belgium	11.9	0.4	1.2	2.9	0.0	1.2	0.0	77.4	5.0	100
Burundi	16.6	4.9	2.1	19.3	0.0	0.2	16.6	0.4	39.9	100
Spain	23.0	1.6	0.0	13.5	0.8	6.3	0.0	51.2	3.6	100
Zambia	5.5	41.5	1.4	1.0	1.6	0.0	23.2	1.0	24.8	100

Wildlife

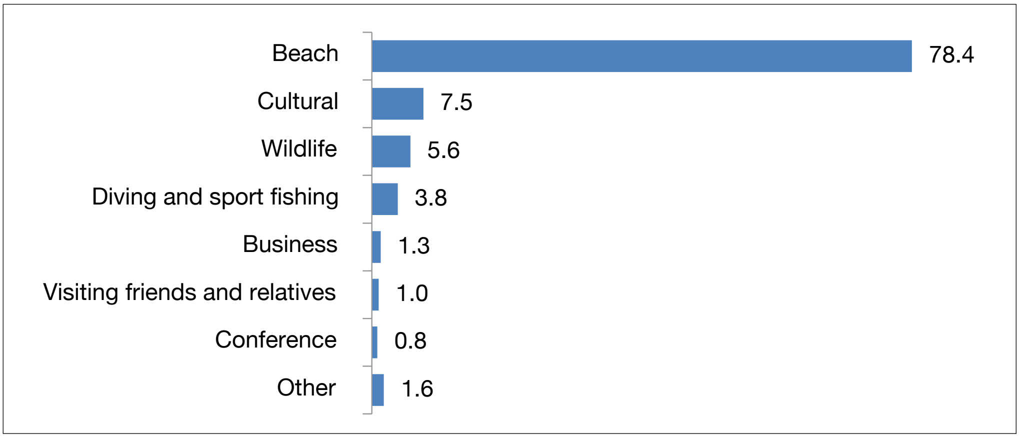
Historical sites at Bagamoyo and Kilwa

Main Tourism Activities in Zanzibar

Zanzibar Islands are famous for outstanding history and culture, beaches and spices. Stone town and spice tour are a must visit tourist attractions while in Zanzibar. Beach tourism continued to be the main tourism activity in Zanzibar accounting for 78.4 percent of total visitors to Zanzibar in 2018 (**Chart 2.28**). Cultural tourism is the second most attractive activity, consistent with the declaration of the Stone Town as UNESCO World heritage site.

Chart 2.28: Share of main tourism activities in Zanzibar

Percent



With the exception of visitors who came to visit friends and relatives, all other tourism activities attracted most visitors under the package tour arrangement (**Chart 2.29**).

Chart 2.29: Main tourism activity by tour arrangement

Percent

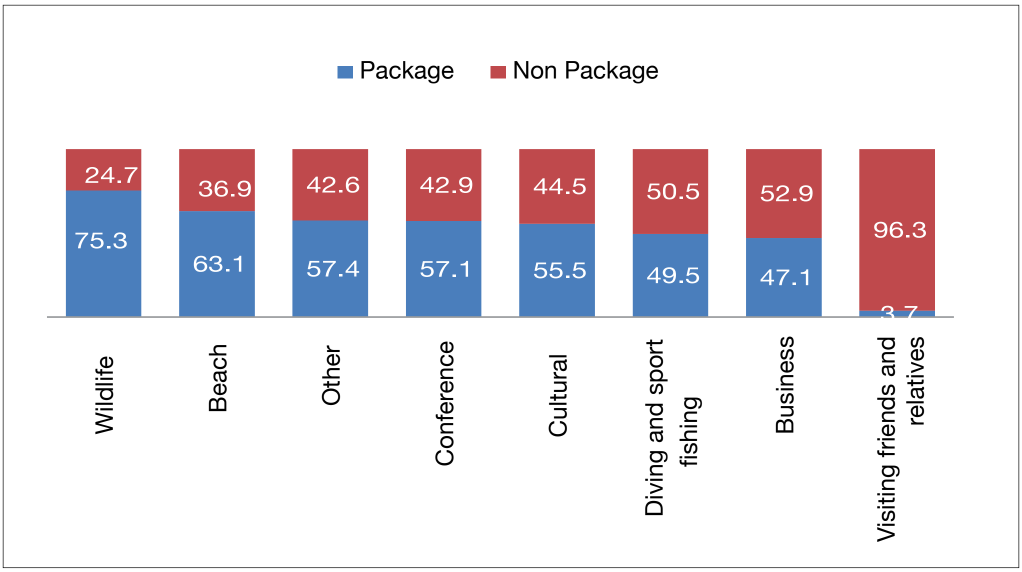


Table 2.19 depicts that visitors from South Africa mainly came for beach, business and conference activities. Visitors from Italy and Germany mainly came for cultural tourism activities.

Table 2.19: Top 15 source markets and tourism activities, Zanzibar

Percent

	Tourism activities										
Country of residence	Beach	Business	Conference	Cultural	Diving and sport fishing	Visiting friends and relatives	Volunteering	Wildlife	Shopping	Other	Total
South Africa	19.4	50.0	33.3	8.0	32.7	3.7	0.0	7.3	85.7	11.4	18.8
Italy	18.0	0.0	0.0	10.0	12.9	0.0	0.0	9.3	0.0	0.0	15.8
Germany	6.7	5.9	0.0	10.0	11.9	3.7	20.0	2.0	0.0	5.7	6.8
United Kingdom	6.5	5.9	4.8	6.5	0.0	0.0	0.0	5.3	0.0	11.4	6.1
United States	4.2	5.9	0.0	13.0	0.0	0.0	0.0	6.7	0.0	0.0	4.7
Norway	4.3	0.0	0.0	8.5	5.0	18.5	0.0	4.7	0.0	0.0	4.7
France	4.2	0.0	0.0	2.0	2.0	0.0	40.0	8.7	0.0	31.4	4.5
Denmark	3.4	0.0	0.0	1.5	3.0	0.0	0.0	4.0	0.0	11.4	3.2
Kenya	3.1	8.8	14.3	1.5	5.0	7.4	20.0	0.0	0.0	8.6	3.2
Spain	2.3	0.0	0.0	7.0	3.0	0.0	0.0	8.0	0.0	0.0	2.9
China	2.0	5.9	9.5	1.0	0.0	0.0	0.0	13.3	14.3	0.0	2.5
United Arab Emirates	2.5	0.0	4.8	2.5	1.0	18.5	20.0	0.0	0.0	0.0	2.5
Australia	1.7	0.0	0.0	5.5	0.0	0.0	0.0	8.0	0.0	0.0	2.2
Switzerland	2.0	0.0	0.0	0.0	1.0	0.0	0.0	1.3	0.0	5.7	1.8
Belgium	1.4	0.0	0.0	2.0	0.0	14.8	0.0	2.0	0.0	0.0	1.5
Other	18.3	17.6	33.3	21.0	22.8	33.3	0.0	19.3	0.0	14.3	18.9
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Exotic beaches of Zanzibar

2.15 Average Expenditure

The survey results indicate that the overall average expenditure per person per night to URT increased to USD 193 in 2018, from USD 162 in 2017. The average expenditure per person per night for visitors under the package tour arrangement was USD 331, while that of the non-package was USD 135. Leisure and holidays visitors continued to be the highest spenders, with an overall average expenditure of USD 245 per person per night. Holiday makers under the package tour spent an average of USD 366, and those under the non-package arrangement spent USD 165.

In Tanzania Mainland, the overall average expenditure per person per night was USD 190. Holidaymakers under the package tour led in spending with an average expenditure of USD 389 per person per night, while the non-package visitors spent an average of USD 156. Meanwhile, the overall average expenditure per person per night in Zanzibar was USD 199. Similar to URT, holiday makers spent the most, with an average of USD 236 per person per night, followed by business visitors (**Table 2.20**).

Table 2.20: Average expenditure by purpose of visit for top 15 source markets

Value in USD

Purpose of visit	URT			Mainland			Zanzibar		
	Package	Non Package	Overall	Package	Non Package	Overall	Package	Non Package	Overall
Business	318	145	191	331	124	183	285	184	208
Leisure and holidays	366	165	245	389	156	253	337	175	236
Visiting Friends and Relatives	268	88	119	252	86	114	291	92	128
Other	207	105	124	218	112	135	152	89	97
Overall average	331	135	193	341	125	190	316	152	199

Table 2.21 shows that visitors from the United States of America had the largest overall average expenditures of USD 288.9 per person per night, followed by visitors from South Africa, China, Switzerland, Zambia, Burundi, France and the United Kingdom whose average expenditure exceeded the overall national average of USD 193.0.

In the case of the package tour arrangement, visitors from South Africa had the highest average expenditure of 475.7, followed by visitors from the United States of America and Switzerland. On the other hand, visitors from China who came under the non-package travel arrangement spent the highest with an average expenditure of USD 402.8.

Table 2.21: Average expenditure of the top 15 source markets by tour arrangement

Value in USD

	Travel arrangement		
Country of residence	Package	Non Package	Overall
United States of America	454.9	143.7	288.9
Kenya	281.7	103.0	186.4
United Kingdom	351.2	108.0	201.6
Germany	208.7	103.4	132.1
South Africa	475.7	137.1	282.2
Italy	223.8	122.4	165.9
Switzerland	421.5	126.1	224.6
France	382.5	101.8	203.9
Uganda	76.4	259.6	152.7
China	182.0	402.8	266.9
Netherlands	285.3	102.7	181.0
Belgium	372.0	113.1	187.1
Burundi	0.0	204.4	204.4
Spain	175.8	195.7	188.0
Zambia	367.3	127.6	207.5

2.16 Tourism Earnings

Tourism earnings in the URT increased by 7.2 percent to USD 2,412.3 million in 2018, from USD 2,250.3 million recorded in 2017. This achievement is attributed to the increase in the number of international tourist arrivals from 1,327,143 visitors recorded in 2017 to 1,505,702 visitors in 2018. A significant number of visitors came for leisure and holidays, accounting for 88.3 percent. The findings also indicate that earnings from the visitors under the package tour arrangement had the largest share of 66.7 percent (**Table 2.22**).

Table 2.22: Tourism earnings by purpose of visit and travel arrangement, URT

Percent

	Travel arrangement		
Purpose of visit	Package	Non Package	Total
Leisure and holidays	72.6	27.4	88.3
Business	19.8	80.2	2.8
Visiting friends and relatives	9.3	90.7	1.8
Other	26.9	73.1	7.1
Overall	66.7	33.3	100.0

Tourism earnings in Zanzibar increased by 3.8 percent to USD 507.5 million in 2018, from USD 489.0 million earned in 2017. This is explained by the increase in visitors' expenditure and international visitor arrivals. Visitors who came for leisure and holidays spent the most (**Table 2.23**).

Table 2.23: Tourism earnings by purpose of visit and travel arrangement, Zanzibar

Millions (USD)

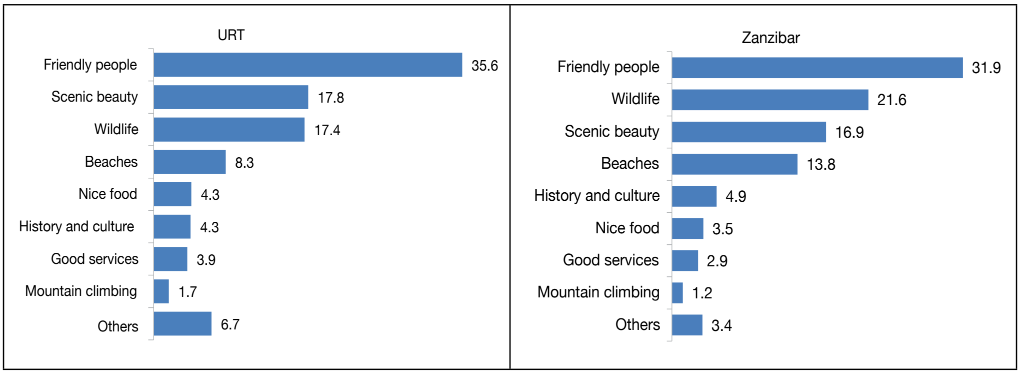
	Travel arrangement		
Purpose of visit	Package	Non Package	Total
Leisure and holidays	198.1	305.4	503.5
Visiting friends and relative	0.2	2.4	2.7
Business	0.2	0.7	0.9
Other	0.2	0.2	0.4
Total	198.7	308.7	507.5

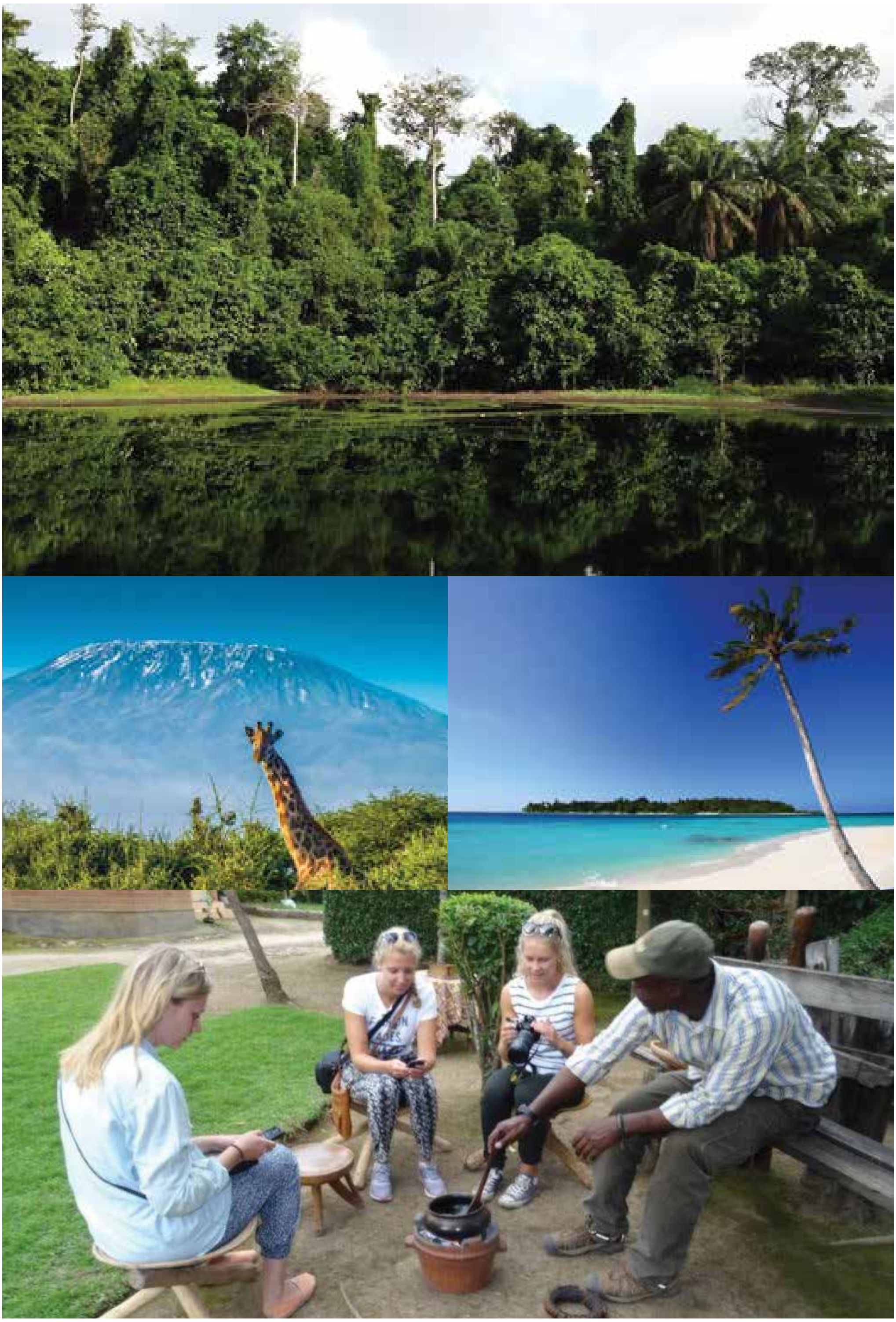
2.17 Visitors' Impression

Generally, visitors were impressed with the warmth and friendliness of the people as well as the scenic beauty and wonderful landscape of Tanzania. Unique wildlife and beautiful beaches were part of unforgettable experience to most of the visitors. Likewise, in Zanzibar, visitors commended the friendliness of the people, beaches and the scenic beauty (**Chart 2.30**).

Chart 2.30: Visitors' impression

Percent





Beautiful attractions and friendly people

Chapter 3: Conclusion and Recommendations

3.1 Conclusion

The International Visitors' Exit Survey is conducted on annual basis, the main objective being to get information for estimating tourist expenditure in Tanzania, as well as for compilation of the National Accounts and Balance of payments statistics. The survey's findings also provide tourism behavioural information for enriching policy review, formulation and decision making. This chapter presents the conclusion of the 2018 International Visitors' Exit Survey report.

The findings reveal that the tourism sector continued to play an important role in Tanzania's economy, including foreign exchange earnings and job creation. In 2018, tourism earnings increased by 7.2 percent to USD 2,412.3 million, from USD 2,250.3 million in 2017. The outturn was mainly on account of an increase in the number of international tourist arrivals to 1,505,702 in 2018 from 1,327,143 in 2017. In Zanzibar, tourism earnings in 2018 amounted to USD 507.5 million, an increase of 3.7 percent.

3.2 Recommendations

a) The survey results show that wildlife and the beaches were the leading activities visited by most of the tourists. Each of other tourism activities recorded less than ten percent of the tourist visitors. The country has a great potential to develop other tourism products such as conference, cruise ship as well as coastal and marine (beach) tourism that could easily be promoted along the wildlife products. In that regard, the Ministry of Natural Resources and Tourism (MNRT), in March 2019, commissioned a team of experts to develop a viable framework on the diversification of the tourism sector geographically and product-wise with the purpose of ensuring the sustainable tourism development in Tanzania.

Cruise ship tourism: With respect to cruise ship tourism, the Dar es Salaam Port has a total of 11 deep berths, of which 4 are dedicated for container operations and 7 for general cargo. Other facilities include the Kurasini Oil Jetties (KoJ), the Single Point Mooring for handling liquid bulk cargo and the Malindi/Lighter wharves used for the coastal trades. The Malindi/Lighter wharf at Dar es Salaam port is a dedicated facility for handling passengers and cargo destined to and from Zanzibar and does not have facilities for handling cruising ships and passengers, especially the senior citizens.

Therefore, if well developed, cruise ship tourism is expected to increase the number of tourists significantly, as optimistic scenario projects that 893,116 more tourists will visit the country per annum. Further, estimates suggest that a total of TZS 1.9 trillion to TZS 7.4 trillion will be earned within the first ten years, subject to strategic investments in destination marketing as well as taking advantage of the already developed infrastructure in transportation systems. In that regard, it is thus recommended to establish an exclusive or dedicated cruise ship berth and terminal at Dar es Salaam Port with supporting facilities such as arrival and departure lounges, restaurants, souvenir shops, immigration desk, banks and transport services.

Coastal tourism: Another potential product is the development of coastal tourism. The coastal belt of Tanzania is home to excellent natural and cultural resources and has the potential to serve as world-class tourist destination. This potential however, has gone unrealized and coastal areas are relatively undeveloped. This untapped potential of coastal tourism has been identified in numerous forums over the past few years. Both policy-makers and the tourism industry stakeholders have been looking to diversify away from wildlife tourism with the view that the development of coastal tourism would enable Tanzania to attract more visitors, thereby increasing revenues for both the Government and private sector.

In order to make the coastlines become world-class tourist destinations, strong partnerships need to be developed amongst key stakeholders. Mechanisms should be established to ensure all relevant stakeholders are involved and a consolidated action plan needs to be developed. Priority actions include:

a) Conducting a detailed study to ascertain beach areas suitable for tourism development, map them and allocate the same as Tourism Special Economic Zone (TSEZ) under SEZ ACT; empower, encourage and direct EPZA to allocate and plan more coastal land for tourism development. The Authority has structures, legal framework and coastal land for beach tourism development in Bagamoyo; establish or appoint an institution to manage the development of coastal tourism beach areas; and imposing high land taxes/rents to owners of undeveloped coastal land.

Responsible institutions: MNRT, LGAs, TIC, TCT, MITH (Zanzibar), ZCT and ZATI

b) The survey results reveal that the share of visitors with age 65 and above continued to be low despite ample time, interest to visit Tanzania and money to spend. It is recommended to continue with the ongoing infrastructure development, especially construction of roads/airstrips in order to address the challenges related to elderly visitors.

Responsible institutions: MNRT, MWTC, LGAs, TIC, TCT, ZCT, ZATI and MICT

c) The survey findings indicate that the share of visitors for meetings and conferences were only 5.5 percent, which implies that there is potential for development of this market segment. Currently, convention and exhibition activities in Tanzania are promoted and hosted by either the public and/or private sectors. The country-wide existing capacity in the private sector has not been established. Establishment of the convention and exhibition tourism is expected to increase the number of tourists significantly. It is projected that, 453,000 convention and exhibition tourists will visit the country in the coming 5 years, and a total of TZS 1.0 trillion to TZS 3.8 trillion will be earned within the first ten years, subject to strategic investments in destination marketing, as well as taking advantage of the already developed infrastructure in transportation systems. It is therefore recommended to construct a state-of-the-art convention centre, with large capacity of the meeting centres; security; good quality accommodation; state-of-the-art technology, personalized service and professional facilitation to ensure eventual success. Kigamboni town is an ideal location due to its proximity to the proposed cruise ship terminal, the commercial city, as well as access to beach tourism destinations and the international airport. Learning from experiences related to convention centres' construction in other countries (Singapore and Rwanda), it is estimated that the construction of the convention centre will cost USD 435 million.

Responsible institutions: MNRT, LGAs, TIC, TCT, MITH (Zanzibar), ZCT and ZATI

d) The findings also indicate that only 1.3 percent of visitors heard about destination Tanzania through diplomatic missions abroad as source of information. In order to effectively market destination Tanzania, it is recommended to enhance economic diplomacy by promoting available tourism attractions and products through Tanzanian Embassies, high commissions and consulates abroad. Also, there is a need to enhance availability and accessibility of information materials to tourists at both source markets and entry points. The materials can be in the form of leaflets, guide maps and brief handbooks describing tourism attractions in Tanzania. The Ministry will develop a Strategic Plan that will be shared with all Diplomatic Missions abroad. Each mission will be furnished with agreed targets and a well Monitoring and Evaluation system will be developed to monitor the performance.

Responsible institutions: MFAEAC, MNRT, TIC, MICS, TCT, ZCT and ZATI

Appendices

Appendix A: Survey Methodology

I. Introduction

The survey adopted similar methodology used for conducting International Visitors' Exit surveys in Tanzania since 2001. It was designed to provide a wide range of information that would facilitate understanding of the magnitude, dynamics and characteristics of the tourism sector. It consists of designing a sample and sample selection; survey instruments, including a questionnaire; scope and coverage; training; data collection and processing; and expenditure estimation procedures.

II. Scope of the Survey

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

III. Sample Size

The sample survey was designed to cover 13,270 departing international visitors, equivalent to one percent of the international visitors recorded in 2017. Ultimately, the survey managed to randomly interview 11,243 respondents. This sample was considered sufficient to meet the survey objectives.

IV. Data Collection

Following the training of interviewers, eight teams were formed (1 for Zanzibar and 7 for Tanzania Mainland). Each team consisted of a team leader and interviewers. Data collection was undertaken during the tourist peak season, which normally runs from July to September. It was conducted for two weeks in August 2018. A team of 30 enumerators was recruited to handle data collection exercise at selected border points. Fieldwork supervision was coordinated by the Technical Committee staff who made visits to the teams to review the work and monitor data quality including the questionnaires' completeness.

V. Survey Coverage

In order to obtain the required information from the international visitors, the survey was conducted at the major eight departure points, namely Julius Nyerere International Airport, Kilimanjaro International Airport, Abeid Amani Karume International Airport, Horohoro, Namanga, Tunduma, Mtukula and Manyovu borders.

VI. Enumerators' Manual

The enumerators' Manual was prepared by the Technical Committee members to be used by the enumerators as a reference document during the survey. The manual contained information and guidelines on the concepts and definitions of some of the key words used in the questionnaire. In addition, the manual provided the description of the questions and data crosschecking mechanism.

VII. Training of Enumerators

Prior to fieldwork, a one day training of enumerators and supervisors was organized for them to understand the questionnaire and the interviewing techniques. The training involved about 30 enumerators who were trained to be interviewers. During the training session, mock interviews were conducted among enumerators to impart required skills. The enumerators were also trained on methods of onsite data editing, quality control procedures and fieldwork coordination.

VIII. The Questionnaire

The questionnaire was designed to ensure that the questions asked capture the required data. The information collected is useful for tourism promotion and macroeconomic policy formulation. The content of the questionnaire was almost similar to that of the previous years' questionnaires. The questionnaire had 23 questions, comprising four main parts namely: visitor profiles, travel behaviour, expenditure patterns and visitor's comments (**Appendix III**).

<u>Questions 1 to 9</u> aimed at establishing the visitor's profiles (nationality, country of residence, age group, gender, purpose of visit, type of tourism activity and source of information about Tanzania).

<u>Questions 10 to 16</u> targeted at obtaining travel behaviour namely, type of tour arrangement (package/non package), items in the package and number of nights spent.

<u>Questions 17 to 21</u> were structured to estimate tourism expenditure. The questions probed for details on the amount spent as well as mode of payment used to transact.

<u>Question 22 and 23</u> seek information on the visitor's impression and areas that need improvement.

IX. Data Processing

Data processing involved manual editing, coding of open-ended questions, data entry and editing of computer-identified errors. Data entry and editing were accomplished using the ORACLE 11 database and web-based application.

X. Tourism Expenditure Estimation

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

The model is depicted in the following equation:

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

Whereby:

E_v = Total tourist expenditure in Tanzania

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

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

V_P = Number of arrivals under the package travel arrangement (The number of international visitor arrivals as recorded by the Immigration Services, adjusted into package visitors by purpose, using package tour arrangement ratio derived from the survey)

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

T = Average length of stay derived from the survey.

The Simplified Model

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

Procedure and assumptions used for the estimation of tourist expenditure for 2018:

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

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

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

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

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

Appendix B: Questionnaire

THE 2018 INTERNATIONAL VISITORS' EXIT SURVEY

Please read the instructions carefully before filling the form.

INTRODUCTION

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

Your Cooperation is highly appreciated

FOR OFFICIAL USE:

*CODE NUMBER:*____

*NAME OF THE RESEARCHER:*____________________________________

*DATE:*__________________________ *SIGNATURE:* ________________________

NAME OF THE DATA ENTRANT: ________________________________

1. Nationality ______________ Country of Residence ___________________

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

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

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

With spouse	[ ]
With children	[ ]
With spouse and children	[ ]
With other friends and relatives	[ ]
Alone *If Yes go to question no. 6*	[ ]

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

5. Write the number of persons whose expenses you are covering according to their age group (except yourself)?

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

6. Gender

Number of females	
Number of males	

7. What was the MAIN purpose of visit to Tanzania (*tick one only*)

Meetings and Conference	[ ]	Scientific and Academic	[ ]
Business	[ ]	Volunteering	[ ]
Visiting Friends and Relatives	[ ]	Other (please specify)……....................	
Leisure and Holidays	[ ]		

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

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

9. What was your MAIN source of information about Tanzania? (*tick one only*)

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

10. Did you travel on non-package or booked a package tour?

	Non package	Package
(*If you travelled on non package, go to question 16*)		

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

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

12. What is the cost of international transport (Return air ticket) per person? Currency [ ]

13. Total cost of the package tour: Currency [ ]

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

15. Total number of nights in the package tour (INCLUDING nights spent in other countries) [ ]

16. Number of nights spent in: Tanzania Mainland [ ]

Zanzibar Islands [ ]

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

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

		Amount
Hotel	Currency..........	
Others (Lodges, Motels, Campsites etc.)	Currency..........	
Food and drinks	Currency..........	
Internal transportation		
By Air	Currency..........	
By Road	Currency..........	
By Water	Currency..........	
by Railway	Currency..........	
Rentals (Car hires, Charters, Boats, etc)	Currency..........	
Cultural services (Museums, Historical sites, etc.)	Currency..........	
Sports and recreational (Diving, cycling etc)	Currency..........	
Sight seeing and excursion	Currency..........	
Mountain climbing	Currency..........	
Hunting	Currency..........	
Access/entry/gate fees	Currency..........	
Visa fees and taxes	Currency..........	
Shopping (Souvenirs, precious metals, crafts, etc)	Currency..........	
Other (please specify)	Currency..........	

19. Is the above breakdown for the whole party? (*tick*)

Yes [ ] No [ ]

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

Cash	[ ]	Traveller's cheques	[ ]
Credit card	[ ]	Other (please specify)	....

21. Was this your first trip to Tanzania? (tick) Yes [ ] No [ ]

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

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

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

Appendix C 1 : International Visitors Arrival by Country of Residence from the Survey

Country of residence	Visitors	Percentage
United States	3,310	15.59
Kenya	1,781	8.39
United Kingdom	1,606	7.57
Germany	1,148	5.41
South Africa	952	4.49
Italy	835	3.93
Switzerland	800	3.77
France	770	3.63
Uganda	686	3.23
China	648	3.05
Netherlands	598	2.82
Belgium	561	2.64
Burundi	531	2.50
Spain	504	2.37
Zambia	495	2.33
Canada	489	2.30
Zimbabwe	477	2.25
Denmark	472	2.22
India	450	2.12
Australia	402	1.89
Norway	368	1.73
United Arab Emirates	283	1.33
Ireland	249	1.17
Sweden	225	1.06
Oman	196	0.92
DRC	179	0.84
Korea	154	0.73
Rwanda	123	0.58
Austria	87	0.41
Israel	87	0.41

Country of residence	Visitors	Percentage
Mexico	78	0.37
New Zealand	78	0.37
Pakistan	70	0.33
Poland	70	0.33
Malawi	66	0.31
Brazil	61	0.29
Russian Federation	60	0.28
Finland	57	0.27
Taiwan	56	0.26
Ethiopia	51	0.24
Japan	50	0.24
Luxembourg	50	0.24
Singapore	48	0.23
Portugal	45	0.21
Malaysia	41	0.19
Thailand	38	0.18
Argentina	36	0.17
Botswana	34	0.16
Nigeria	33	0.16
Mozambique	32	0.15
South Sudan	31	0.15
Czech Republic	30	0.14
Romania	30	0.14
Egypt	29	0.14
Saudi Arabia	29	0.14
Korea	28	0.13
Qatar	26	0.12
Philippines	25	0.12
Swaziland	25	0.12
Comoros	23	0.11
Namibia	22	0.10
Turkey	21	0.10
Vietnam	21	0.10
Morocco	18	0.08

Country of residence	Visitors	Percentage
Chile	16	0.08
Colombia	16	0.08
Niger	16	0.08
Sudan	16	0.08
Iran	15	0.07
Lesotho	14	0.07
Seychelles	13	0.06
Lebanon	12	0.06
Mauritius	12	0.06
Reunion	11	0.05
Slovakia	11	0.05
Ecuador	9	0.04
Jordan	9	0.04
Nepal	9	0.04
Liechtenstein	8	0.04
Croatia	7	0.03
Greece	7	0.03
Iceland	7	0.03
Malta	7	0.03
Yemen	7	0.03
Algeria	6	0.03
Andorra	6	0.03
Ghana	6	0.03
Indonesia	5	0.02
Kuwait	5	0.02
Liberia	5	0.02
Afghanistan	4	0.02
Bangladesh	4	0.02
Estonia	4	0.02
Macedonia	4	0.02
Myanmar	4	0.02
Panama	4	0.02
Paraguay	4	0.02
Saint Kitts and Nevis	4	0.02
Bosnia and Herzegovina	3	0.01

Country of residence	Visitors	Percentage
Georgia	3	0.01
Hungary	3	0.01
Slovenia	3	0.01
Venezuela	3	0.01
Albania	2	0.01
Belarus	2	0.01
Bulgaria	2	0.01
Congo-Brazzaville	2	0.01
Gambia	2	0.01
Iraq	2	0.01
Jamaica	2	0.01
Libyan Arab Jamahiriya	2	0.01
Madagascar	2	0.01
Mauritania	2	0.01
Senegal	2	0.01
Serbia	2	0.01
Togo	2	0.01
Trinidad and Tobago	2	0.01
Tunisia	2	0.01
Ukraine	2	0.01
Uruguay	2	0.01
Armenia	1	0.00
Bahrain	1	0.00
Cameroon	1	0.00
Chad	1	0.00
Cote D Ivoire	1	0.00
Eritrea	1	0.00
Kazakstan	1	0.00
Laos	1	0.00
Maldives	1	0.00
Palestinian	1	0.00
Sri Lanka	1	0.00
Syrian Arab Republic	1	0.00
Grand Total	21,226	100.00

Appendix C 2 : International Visitors Arrival by Nationality from the Survey

Nationality	Total visitors	Percentage
American	3,281	15.46
British	1,724	8.12
Kenyan	1,641	7.73
German	1,169	5.51
South African	954	4.49
Italian	870	4.10
French	816	3.84
Swiss	728	3.43
Ugandan	660	3.11
Dutch	656	3.09
Chinese	655	3.09
Indian	607	2.86
Belgian	562	2.65
Burundian	522	2.46
Spanish	507	2.39
Canadian	499	2.35
Zimbabwean	485	2.28
Zambian	483	2.28
Danish	451	2.12
Australian	409	1.93
Norwegian	370	1.74
Irish	251	1.18
Swedish	237	1.12
Congolese	182	0.86
Omani	167	0.79
South Korean	138	0.65
Rwandan	117	0.55
Pakistani	94	0.44
New Zealander	93	0.44
Israeli	89	0.42
Austrian	84	0.40
Polish	83	0.39
Finnish	70	0.33

Nationality	Total visitors	Percentage
Mexican	67	0.32
Brazilian	64	0.30
Tanzanian	60	0.28
Nigerian	59	0.28
Russian	59	0.28
Japanese	56	0.26
Taiwanese	55	0.26
Portuguese	52	0.24
Malawian	47	0.22
Malaysian	46	0.22
Botswanan	38	0.18
Ethiopian	36	0.17
North Korean	36	0.17
Romanian	36	0.17
Thai	36	0.17
Emirati	33	0.16
Turkish	33	0.16
Mozambican	32	0.15
Argentinian	31	0.15
Egyptian	31	0.15
Philippine	31	0.15
Czech	30	0.14
Lux	29	0.14
Morrocan	27	0.13
Yemeni	26	0.12
Sudanese	24	0.11
Singaporean	21	0.10
Comorian	19	0.09
Vietnamese	19	0.09
Saud Arabian	18	0.08
Lesothoan	15	0.07

Nationality	Total visitors	Percentage
Colombian	14	0.07
Iranian	14	0.07
Qatari	14	0.07
Namibian	13	0.06
Lebanese	12	0.06
Seychellois	12	0.06
Slovak	12	0.06
Somali	12	0.06
South Sudanese	12	0.06
Nepalese	11	0.05
Chile	10	0.05
Ecuadorean	9	0.04
Ghanaian	9	0.04
Jordanian	9	0.04
Greek	8	0.04
Swazi	8	0.04
Andorran	7	0.03
Chilean	7	0.03
Icelandic	7	0.03
Liechtensteiner	7	0.03
Maltese	7	0.03
Mauritanian	7	0.03
Mauritian	7	0.03
Tunisian	7	0.03
Algerian	6	0.03
Bulgarian	6	0.03
Croat	6	0.03
Liberian	6	0.03
Lithuania	6	0.03
Antiguan	5	0.02
Bangladeshi	5	0.02
Korean	5	0.02
Serb	5	0.02

Nationality	Total visitors	Percentage
Syrian	5	0.02
United Arab Emirates	5	0.02
Afghan	4	0.02
Burmese	4	0.02
Hungarian	4	0.02
Kittitian	4	0.02
Macedonian	4	0.02
Malagasy	4	0.02
Panamanian	4	0.02
Paraguayan	4	0.02
Ukrainian	4	0.02
Armenian	3	0.01
Belarusian	3	0.01
Bosnian	3	0.01
Cameroonian	3	0.01
Estonian	3	0.01
Georgian	3	0.01
Indonesian	3	0.01
Iraqi	3	0.01
Senegalese	3	0.01
Slovene	3	0.01
Togolese	3	0.01
Albanian	2	0.01
Gambian	2	0.01
Haitian	2	0.01
Jamaican	2	0.01
Korea	2	0.01
Latvian	2	0.01
Libyan	2	0.01
Luxembourg	2	0.01
Moldovan	2	0.01
Peruvian	2	0.01
Slovakian	2	0.01

Nationality	Total visitors	Percentage
Trinidadian	2	0.01
Uruguayan	2	0.01
Venezuelan	2	0.01
Angolan	1	0.00
Bahraini	1	0.00
Beninese	1	0.00
Burkinese	1	0.00
Eritrean	1	0.00
Ivorian	1	0.00
Kazakh	1	0.00
Laotian	1	0.00
Madagascar	1	0.00
Mongolian	1	0.00
Palestinian	1	0.00
Saint Lucian	1	0.00
Salvadorean	1	0.00
Sri Lankan	1	0.00
Grand Total	21,226	100.00

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