The 2020 International Visitors' Exit Survey Report

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TANZANIA TOURISM SECTOR SURVEY

THE 2020 INTERNATIONAL VISITOR'S EXIT SURVEY REPORT

Contents

ACRONYMS v
GLOSSARY vi
FOREWORD ix
ACKNOWLEDGEMENT x
EXECUTIVE SUMMARY xi
Chapter 1: Recent Developments in the Tourism Industry 1
1.1 Global perspective 1
1.2 Recent tourism developments in Tanzania 3
Chapter 2: Analysis of the Survey's Results 10
2.0 Introduction 10
2.1 Source markets 10
2.2 Age group 11
2.3 Age group and travel party 13
2.4 Purpose of Visit 17
2.5 Travel Arrangement 20
2.6 First-time and repeat visits 22
2.7 Departure points 25
2.8 Source of information 26
2.9 Travel party 26
2.10 Nights spent and length of stay 28
2.11 Mode of payment 33
2.12 Main tourism activity 35
2.13 Tourism activity by travel arrangement 36
2.14 Tourism activity by top 15 source markets 37
2.15 Average expenditure 38
2.16 Tourism earnings 40
2.17 Impact of COVID-19 on tourism and hospitality industry 41
2.18 Effect of COVID-19 on travel plan 42
2.19 Outlook 43
2.20 Visitors' impression and areas of improvement 44
Chapter 3: Conclusion and Recommendations 46
3.1 Conclusion 46
3.2 Recommendations 46

Appendices 49
Appendix A: Survey methodology 50
Appendix B: Questionnaire 55
Appendix C: International visitors' arrival by country of residence 60
References 63

List of Tables

Table 1.1: International Tourist Arrivals by Regions, 2016-2020 2

Table 2.1: Age group and purpose of visit, URT 2020 12

Table 2.2: Age group and purpose of visit, Zanzibar 2020 13

Table 2.3: Age group and travel party, URT 2020 13

Table 2.4: Age group and travel party, Zanzibar 2020 14

Table 2.5: Distribution of top 15 source markets by age group, URT 2020 14

Table 2.6: Distribution of top 15 source markets by age group, Zanzibar 2020 15

Table 2.7: Distribution of Top 15 Source Markets by Purpose of Visit, URT 18

Table 2.8: Distribution of Top 15 Source Markets by Purpose of Visit, Zanzibar 2020 19

Table 2.9: Top 15 Source Markets by Travel Arrangement, URT 20

Table 2.10: Top 15 Source Markets by Travel Arrangement, Zanzibar 21

Table 2.11: Travel arrangement by purpose of visit 22

Table 2.12: First-time visitors and repeat visitors by purpose of visit, URT 24

Table 2.13: First-time visitors and repeat visitors by purpose of visit, Zanzibar 25

Table 2.14: Visitors by departure points, URT 25

Table 2.15: Length of stay by purpose of visit and top 15 source markets, URT 29

Table 2.16: Length of stay by purpose of visit and top 15 source markets, Zanzibar 31

Table 2.17: Distribution of visitors by nights spent and purpose of visit, URT 32

Table 2.18: Distribution of visitors by the nights spent and purpose of visit, Zanzibar 33

Table 2.19: Tourism activities by top 15 source markets 37

Table 2.20 (a): Average expenditure by purpose and travel arrangement, URT 38

Table 2.20 (b): Average expenditure by purpose and travel arrangement, Zanzibar 38

Table 2.21: Average expenditure - top 15 source markets by travel arrangement, URT 39

Table 2.22: Average Expenditure - top 15 source markets by travel arrangement, Zanzibar 39

Table 2.23: Tourism earnings by travel arrangement and purpose of visit, URT 40

Table 2.24: Tourism earnings by travel arrangement and purpose of visit, Zanzibar 41

List of Charts

Chart 1.1: Global international tourist arrivals, 2011-2020........1
Chart 2.1: Top 15 Source markets for the URT, 2019 and 2020........10
Chart 2.2: Top 15 Source markets for Zanzibar, 2019 and 2020........11
Chart 2.3: Tour arrangement by age group, URT........15
Chart 2.4: Tour arrangement by age group, Zanzibar........16
Chart 2.5: Gender by purpose of visit, URT........16
Chart 2.6: Gender by purpose of visit, Zanzibar........17
Chart 2.7: Purpose of visit, United Republic of Tanzania, 2019 and 2020........18
Chart 2.8: Purpose of Visit Zanzibar, 2019 and 2020........19
Chart 2.9: Visitors by tour arrangement, URT........21
Chart 2.10: First-time and repeat visitors........23
Chart 2.11: Proportion of first-time and repeat visitors by top 15 source markets, URT........23
Chart 2.12: First-time and repeat visitors by top 15 source markets, Zanzibar........24
Chart 2.13: Source of information about destination Tanzania........26
Chart 2.14: Travel party, United Republic of Tanzania 2020........27
Chart 2.15: Travel party, Zanzibar 2020........28
Chart 2.16: Average length of stay by purpose of visit, URT........29
Chart 2.17: Average length of stay by purpose of visit, Zanzibar........30
Chart 2.18: Distribution of visitors by night spent, URT........32
Chart 2.19: Distribution of visitors by nights spent, Zanzibar........33
Chart 2.20: Mode of Payment, URT........34
Chart 2.21: Mode of payment, Zanzibar........34
Chart 2.22: Cash payment by tour arrangement for top 15 source markets, 2020........35
Chart 2.23: Main tourism activities in URT........35
Chart 2.24: Most visited tourist attractions........36
Chart 2.25: Main tourism activity in zanzibar........36
Chart 2.26: Tourism activity by travel arrangement........37
Chart 2.27: Effect of COVID-19 on travel plan........43
Chart 2.28: Visitors' Impression........44
Chart 2.29: Areas for improvement........45

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 Cooperation
MICT	Ministry of Infrastructure, Communication and Transportation - Zanzibar
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

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

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

Average Length of Stay: Average number of nights that a visitor spends at a destination.

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

Commission: percent of the total product cost paid to travel agents and other travel product distributor for selling a product or service consumer.

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

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

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

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

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

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

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

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

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

High season: period of the year when occupancy/usage of hotel or attraction is the highest, also referred to as peak season.

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

International tourist: 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.).

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 a resident entity in the country visited.

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

Low season: the period of the year when occupancy/usage of hotel or attraction is the lowest, also referred to as off - peak season.

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

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

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

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

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

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

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

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

Travel Agent: A private retailer or public service that provides travel and tourism-related services to the general public on behalf of accommodation or travel suppliers to offer different kinds of travelling packages for each destination. Agents charge some percent as commission for coordinating the travel.

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

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

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

FOREWORD

The 19th International Visitors' Exit Report brings assessment of the developments in the tourism sector both at global and national levels. The report has been instrumental in providing important information to various stakeholders, but more importantly, to the Government for policy making and strategizing on effective tourism promotion initiatives. The report shows that during 2020, the global tourism industry experienced the worst record in history, with international arrivals dropping by 74.0 percent, from the number recorded in 2019 following the outbreak of COVID-19 pandemic and unprecedented fall in tourism services demand due to widespread travel restrictions. Destinations worldwide recorded 1 billion fewer international arrivals in 2020 than in the previous year and USD 1.3 trillion loss in tourism exports.

In Tanzania, the number of international visitors declined by 59.3 percent to 620,867 in 2020 from 1,527,230 recorded in 2019. Consequently, international tourism earnings dropped from USD 2,604.5 million in 2019 to USD 714.6 million in 2020. The prospects for 2021 are brighter compared to 2020 and expected to continue improving further in the medium term, following rolling out of vaccines and easing of travel restrictions in many economies.

We trust that this report provides important information to various stakeholders in the tourism sector for use in strategizing better services for improved earnings going forward.

Mohamed O. Mchengerwa (MP.)

MINISTER OF NATURAL RESOURCES AND TOURISM

ACKNOWLEDGEMENT

Completion of this report was enabled by contributions of various stakeholders from within and outside the collaborating institutions. The Steering Committee of the Tanzania Tourism Sector Survey would like to acknowledge and express appreciation for the support received from all of them. The Committee is thankful to staff of the Immigration Services Department, particularly at the departure points of Julius Nyerere International Airport, Abeid Amani Karume International Airport, Kilimanjaro International Airport, Horohoro, Namanga, Tunduma, Mtukula and Manyovu.

The diligent guidance received from the Chief Executive Officers of the participating institutions namely: The Ministry of Natural Resources and Tourism (MNRT); Bank of Tanzania (BOT); National Bureau of Statistics (NBS); Immigration Services Department (ISD); Zanzibar Commission for Tourism (ZCT) and the Tourism Confederation of Tanzania (TCT) is highly appreciated.

The overall supervision was under the guidance of Mr. Phillip Chitaunga (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 implementation of the survey and report writing was conducted by the Technical Team, which was led by Mr. Paskasi Mwiru (MNRT) and Festo Mlele (BOT). Other members of the team are Dr. Deogratias Macha, Villela Waane, Phillip Mboya, Tumaini Longishu, Eliya Jairo, Rweyemamu Barongo from BOT; Josephat Msimbano from MNRT; Valerian Tesha, Eliaranya Lema and Jovitha Rugemalila from NBS; Philimon Msenya from ISD; and Maabad Jaffar from ZCT.

EXECUTIVE SUMMARY

Introduction

The Ministry of Natural Resources and Tourism in collaboration with the Bank of Tanzania, National Bureau of Statistics, Immigration Services Department and Zanzibar Tourism Commission continued to assess the performance of tourism industry through conducting international visitors' exit surveys. This is the 19^{th} cycle of the surveys, from the first survey conducted in 2001. The report provides useful information for policy formulations, compilation of the National Accounts and Balance of Payments statistics; among others.

Tourism developments

UNWTO World Tourism Barometer of January 2021 shows that the global tourism industry experienced the worst record in 2020, with international arrivals dropping by 74.0 percent from the number recorded in 2019, following the outbreak of COVID-19 pandemic and unprecedented fall in tourism services demand due to widespread of travel restrictions. Destinations worldwide recorded 1 billion fewer international arrivals in 2020 than in the previous year, USD 1.3 trillion loss in tourism exports and threatened up to 120 million direct jobs.

In Tanzania, the number of international visitor arrivals declined by 59.3 percent to 620,867 in 2020 from 1,527,230 recorded in 2019. Consequently, international tourism earnings dropped from USD 2,604.5 million in 2019 to USD 714.6 million in 2020. The prospects for 2021 are brighter than 2020 and are expected to continue improving further in the medium term following rolling out of vaccines and easing of travel restrictions.

Recent tourism developments in the United Republic of Tanzania

A number of activities took place in 2020 that have a positive bearing in the tourism industry. The main initiatives include:

i. **The 2020 Outlook Traveler Award (OLTA) on Wildlife Tourism**

The United Republic of Tanzania received the best International Wildlife Destination from Outlook Traveler Award (OLTA) in 2020. The award will play a key role in marketing destination Tanzania and her tourism potentials to a wide spectrum of clienteles and act as a catalytic and symbol of conserving wildlife for the benefit of the national economy.

ii. **The World Travel Awards**

The World Travel Awards declared Serengeti as the 2020 African's leading National Park in November 9, 2020. The park won category 9 -African Leading National Park for two consecutive years. The Serengeti park is not only known for its 1.5 million wildebeest migration experience through its plains and woodland, but also for its unique landscape and other spectacular wildlife attractions.

iii. **The Zanzibar International Tourism Forum**

The Zanzibar Commission for Tourism in collaboration with New Vision Consortium established the Zanzibar International Tourism Forum in September 2020. The Forum is an annual event aimed at showcasing the country's tourism wealth and opportunities. The Forum was held at Ngalawa Beach Resort and gathered more than 300 participants from more than 20 countries. The event enhanced networking among the players in the sector and is expected to promote the country's tourism attractions.

iv. **Tanzania received the "safe travels" stamp**

The World Travel and Tourism Council (WTTC) gave Tanzania the "safe travels" nod, which provides travelers with confidence to visit her rich and varied attractions. The stamp is given to tourism authorities and companies around the world. which have implemented health and hygiene protocols that are aligned with WTTC's Global Safe Travels Protocols. Tanzania is among the few countries in the world that have received the safe travel stamp. The nod marks another step to assure visitors that Tanzania is a safe destination.

v. **Expansion of Abeid Amani Karume International Airport**

The construction of terminal III at Abeid Amani Karume International Airport was completed and officially inaugurated on 28th September 2020 by H. E. Dr. Ali Mohamed Shein, the President of the Revolutionary Government of Zanzibar. The inauguration marks the Government's initiatives to transform the economy by boosting tourism, trade and creation of job opportunities.

vi. **Improvement of transportation to Rubondo Island**

The Government, in June 2020 procured MV Rubondo ferry to facilitate movement to Rubondo Island. The ferry is expected to increase the number of visitors from within the country and the EAC region.

vii. **New airline routes**

Two giant international airlines namely, Royal Dutch Airline (KLM) and Lufthansa launched new routes to Tanzania in March, 2020. KLM has twice – weekly route to Tanzania and operates between Amsterdam – Zanzibar – Dar es salaam – Amsterdam, while Lufthansa has a direct route from Frankfurt – Zanzibar, twice a week. Both companies serve the Western Europe market with Lufthansa mainly focusing on the German Market. Further, Zanzibar registered an increase in Charter flights from Northern Europe, especially Russia and Ukraine in 2020.

Main findings

i. The top 15 source markets in 2020 accounted for about two-thirds of total visitors, similar to the previous year, and the majority of visitors were from Burundi, followed Kenya and the United States of America. Some neighboring countries replaced long haul source markets in the list of the top 15, largely due to spread of COVID-19 pandemic, which caused many countries to close their borders.

ii. Visitors who came for leisure and holidays accounted for the largest share, followed by those who came to visit friends and relatives. Despite having a large share, visitors who came for leisure and holidays declined sharply from 67.0

percent in 2019 to 44.1 percent in 2020.The sharp decline was attributed to COVID-19 pandemic, which disrupted travel plans for most international travellers.

iii. The majority of visitors came under the non-package travel arrangement. This similar pattern was observed in the last five years with the exception of 2019. Visitors from long haul source markets mainly came under the package tour arrangement, while those from the neighbouring countries mainly used the non-package travel arrangement.

iv. The overall average length of stay was 10 nights in 2020 compared to 13 nights in 2019. With exception of 2019, the trend remained unchanged at 10 nights for the last eight years. Visitors from the long-haul source markets stayed the longest, with visitors from Germany staying for an average of 16 nights, followed by those from the United States of America, who stayed for 15 nights. For the case of Zanzibar, the overall average length of stay was 7 nights in 2020.

v. The overall average expenditure per person per night dropped by 42.9 percent to USD 152 in 2020 from USD 266 in 2019. Business visitors spent the highest with an average of USD 197 per person per night. Visitors from the United States had the highest average expenditure of USD 448.0 per person per night, followed by business visitors from Burundi and Zambia with an average of USD 290.9 and USD 255, respectively.

vi. Tourism earnings declined by 70.4 percent to USD 714.5 million in 2020, from USD 2,604.46 million recorded in 2019, mainly driven by decrease of international arrivals by 59.3 percent and the length of stay. In Zanzibar, earnings fell by 28.9 percent to USD 380.1 million in 2020 compared with USD 535.2 million earned in 2019.

Policy recommendations

Given the fact that the tourism and hospitality industry in Tanzania is severely hit by COVID-19 pandemic, strategies regarding COVID19 precaution measures, tourism marketing and product development are essential for recovery and development of the tourism sector. There is a need to adapt to the new norms of traveling and living amidst the pandemic. Thus, among other things, strategies should focus on increasing the number of tourists from different parts of the world and their length of stay at destination Tanzania. In this regard, the following key policy issues and recommendations are made for improving the sector:

i. strengthening of COVID-19 precaution measures through testing visitors, implementation of standard operating procedures (SOP) and adhering to other guidelines and measures provided by the United Nations Health organization to control the spread of the disease;

ii. enhancing development of domestic tourism by creating public awareness on the importance of visiting numerous tourist attractions using various means including adverts, newspapers and Tanzania Safari channel as well as providing affordable prices in protected areas' accommodation facilities;

iii. further develop and diversify tourism products including development of beaches particularly in Tanzania Mainland, waterfront project, cruise ship tourism, cultural and historical and Meetings Incentives Conference and Events (MICE). This could go hand in hand with improving infrastructure leading to such investments;

iv. establishment of e-marketing strategy and set aside more resources for tourism promotion in non-traditional markets, especially in Eastern Europe, Russia, Asia and other regions; and

v. Develop promotion platforms like mobile, digital and web browsers.

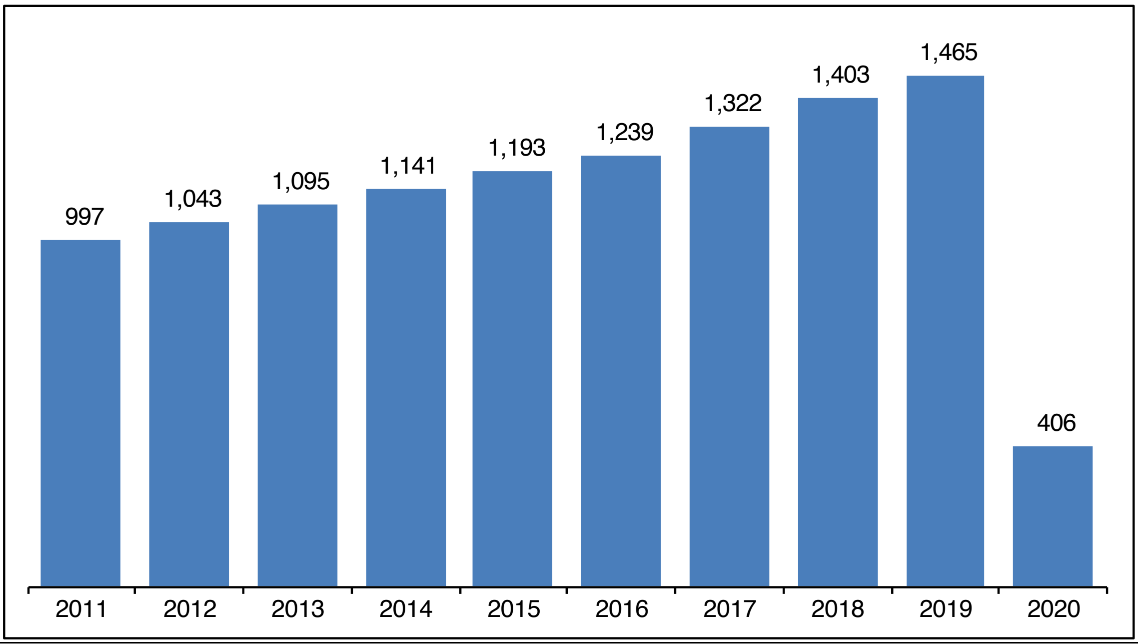
Chapter 1: Recent Developments in the Tourism Industry

1.1 Global perspective

The World Tourism Organization (UNWTO) report indicates that international tourist arrivals declined by 72.3 percent in 2020 to 406 million from 1.5 billion recorded in 2019. The decline is largely explained by the outbreak of the Corona virus, which interrupted the growth of the tourism sector worldwide (**Chart1.1**). According to the UNWTO forecasts, the industry will take between 2.5 and 4 years to return to pre-pandemic levels of international tourist arrivals.

Chart 1.1: Global international tourist arrivals, 2011-2020

In millions



Source: UNWTO World Tourism Organization Barometer, Various Issues

As a region, Asia and the Pacific recorded an 83.5 percent decline of international arrivals – for it continues to have the highest level of travel restrictions in the world. Europe and Africa saw a decline of 68 percent and 71.7 percent in tourist arrivals, respectively. Meanwhile, the Middle East and Americas recorded a drop of 72.8 percent and 68.2 percent, respectively (**Table 1.1**).

Table 1.1: International Tourist Arrivals by Regions, 2016-2020

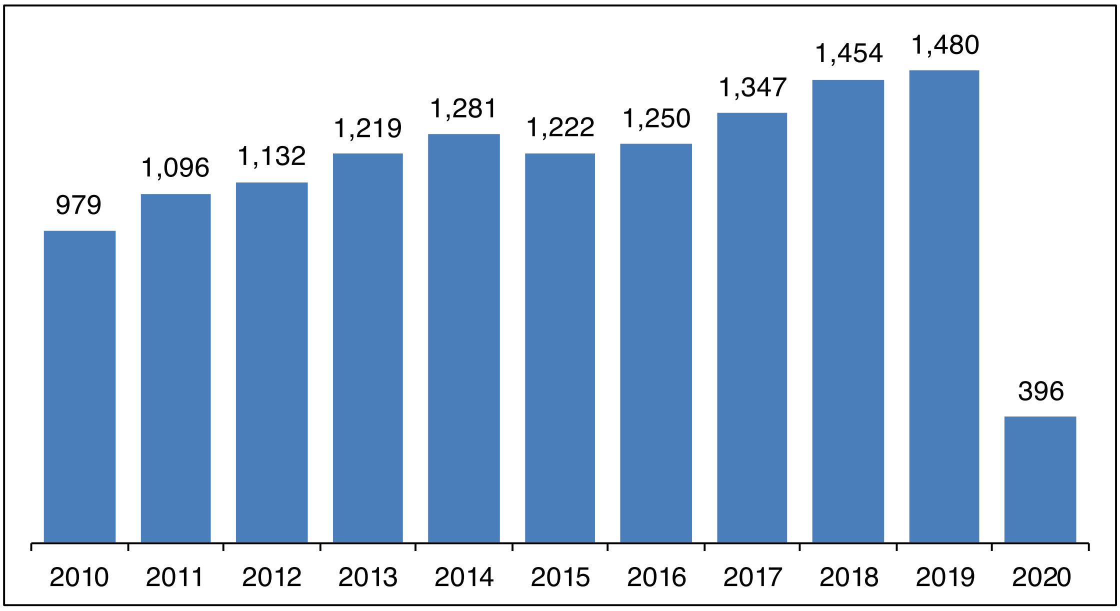
	Annual percentage change				
Region	2016	2017	2018	2019	2020
World	3.8	7.2	5.6	3.8	-72.3
Europe	2.0	8.8	5.8	3.7	-68.0
Asia and Pacific	7.7	5.7	7.3	4.6	-83.5
Americas	3.7	4.7	2.4	2.0	-68.2
Africa	7.8	8.5	8.5	4.2	-71.7
Middle East	-47.0	4.1	3.0	7.6	-72.8

Source: UNWTO World Tourism Organization Barometer, Various Issues

Consequently, international tourism receipts declined by 40 percent to USD 396 billion in 2020 from USD 1,480 billion in 2019, the historical drop of the sector (**Chart 1.2**). This development also led to the loss of more than 100.8 million direct jobs in tourism worldwide, especially for Small Island Developing States (SIDS)[1] and countries which depend on the tourism sector as a major economic activity.

Chart 1.2: International tourist earnings, 2010-2020

Billions of USD



Source: UNWTO World Tourism Organization Barometer, Various Issues

[1] *Small Island Developing States (SIDS)* are islands of the Caribbean Sea and the Atlantic, Indian and Pacific Oceans. Mostly with white sand beaches, mountain ranges, historic ports and towns, as well as agricultural landscapes.

1.2 Recent tourism developments in Tanzania

Tourism is among the key sectors that generate foreign exchange in the country. However, in 2020 tourism generated USD 714.6 million, which is equivalent to 72.6 percent decline from USD 2,604.46 million generated in 2019. The number of international arrivals also decreased by 59.3 percent to 620,867 in 2020 from 1,527,230 in 2019, following the outbreak of the COVID-19 pandemic worldwide. Economies undertook different measures to combat the spread of the disease including lockdowns, social distancing, and international travel restrictions. Notwithstanding, the dismal performance of the sector, a number of tourism related activities took place in 2020, that have a positive bearing in the industry in Tanzania. These activities are discussed in the subsequent sections.

1.2.1 Tanzania wins Best International Wildlife Destination

The United Republic of Tanzania, won the best International Wildlife Destination from the Outlook Traveler Award (OLTA) 2020. The award was presented to the Ambassador of Tanzania in India H.E. Baraka H. Luvanda on 22nd September, 2020. The award will play an important role in marketing destination Tanzania and offer to a wide spectrum of clienteles as one of Africa's leading travel destination. The award will act as a catalytic and symbol of conserving wildlife for benefit of the national economy.

Tanzania's High Commissioner to India, H.E. Amb. Baraka Luvanda receiving the Best International Wildlife Award 2020

1.2.2 Serengeti awarded 2020 African's leading national park

In November 9, 2020 the World Travel Awards declared Serengeti as *the 2020 Africa's leading national park*. Serengeti won category 9 -African Leading National Park for two consecutive years, 2019 and 2020. Serengeti contested with other National Parks including Central Kalahari (Botswana), Etosha (Namibia), Kidepo Valley (Uganda), Kruger (South Africa) and Maasai Mara National Reserve (Kenya). The Serengeti is known not only for the 1.5 million wildebeest migration event through its plains and woodland, but also its unique landscape and other spectacular wildlife attractions.

Serengeti was awarded "the 2020 African's leading national park"

1.2.3 Establishment of the Zanzibar International Tourism Forum (ZITF)

Zanzibar Commission for Tourism in collaboration with New Vision Consortium established the Zanzibar International Tourism Forum in September, 2020. The Forum is an annual event aimed at showcasing the country's tourism wealth and opportunities. The event took six days (3 - 8 September 2020) at Ngalawa Beach Resort located outside of Stone Town and was officiated by the Minister for Tourism and Heritage Zanzibar, Hon. Mahmoud Thabit Kombo. The event gathered more than 300 participants from more than 20 countries in the world. The forum also intended to educate key tourism stakeholders about the benefits of sustainability practices in the sector. The event enhanced networking among the players in the sector and is expected to promote the country's tourism attractions.

Hon. Mahmoud Thabit Kombo, the Minister for Tourism and Heritage officiating the Zanzibar International Tourism Forum (ZITF) at Ngalawa Beach Resort

1.2.4 The World Travel and Tourism Council endorsed Tanzania to use a Safe Travel Stamp

The World Travel and Tourism Council (WTTC) gave Tanzania the “safe travels” nod, which provide travelers with confidence to visit her rich and varied attractions. The stamp is given to tourism authorities and companies around the world that have implemented health and hygiene protocols which are aligned with WTTC’s Global Safe Travels Protocols. Tanzania is among the few countries in the world that have received the safe travel stamp. Tanzania’s endorsement to use the Safe Travels stamp marks another step to assure the visitors that Tanzania is safe, open and ready to provide travelers with unforgettable exciting experiences.

Natural Resources and Tourism Minister, Dr. Hamisi Kigangwalla (middle), Deputy Minister, Costantine Kanyasu (right) and Deputy Permanent Secretary in the Ministry, Dr. Aloyce Nzuki displaying safe travel logo of the safe travel stamp to journalists during its official launch in Dar es Salaam

1.2.5 Inauguration of Passenger Terminal III at Abeid Amani Karume International Airport

The construction of terminal III at Abeid Amani Karume International Airport was completed and officially inaugurated on 28th September 2020 by H. E. Dr. Ali Mohamed Shein, the President of the Revolutionary Government of Zanzibar. The inauguration of terminal III marks the Government's initiatives to transform the economy by boosting tourism, trade and creation of job opportunities. The terminal has 27 airline and immigration counters, Passengers Boarding Bridges (PBB), baggage handling system, and security checkpoints with modern systems such as x-ray machines, Explosive Detection Standard 3 (EDS STD.3) systems. Other facilities in the terminal include state-of-the-art waiting lounge, parking area, duty-free shops, a smoking area and VIP lounge.

H. E. Dr. Ali Mohamed Shein, the President of the Revolutionary Government of Zanzibar officially opening new terminal III at the Abeid Amani Karume International Airport

1.2.6 Inauguration of Ferry in Rubondo Island

Rubondo Island was officially declared as a National Park in 1977. The park is an important breeding ground for both migratory birds and fish species, especially Tilapia and the Nile perch. For a long time, it stood to be the only area in the waters of Lake Victoria, which was well protected and preserved. Given the inadequate transportation facilities to the island for visitors, the government procured MV Rubondo ferry in order to facilitate movement to the Island. The ferry was officiated by the Director General of Tanzania National Parks Authority, Dr. Alan Kijazi on 22 June, 2020. The ferry is expected to increase the number of visitors to the island from within the country and the EAC region.

MV Rubondo ferry which was officiated in September 2020

1.2.7 International Flights

Two giant international airlines namely, Royal Dutch Airline (KLM) and Lufthansa launched new routes to Tanzania in March 2020. KLM flies twice – weekly route to Tanzania and operates between Amsterdam – Zanzibar – Dar es salaam – Amsterdam, while Lufthansa route is from Frankfurt – Zanzibar, twice a week. Both companies serve the Western Europe market, with Lufthansa mainly focusing on the German Market. Further, Zanzibar registered an increase in Charter flights from Northern Europe, particularly Russia and Ukraine in 2020. This outturn is partly associated with the outbreak of COVID-19 pandemic, which has diverted visitors from countries with lockdown to Zanzibar. Such flights were originally destined to India, Thailand and China.

1.2.8 Introduction of Standard Operating Procedures (SOPs) in Tourism

The United Nations World Tourism Organization (UNWTO) and the World Health Organization (WHO) jointly issued a statement on 27th February, 2020 requesting countries in the world to provide information on how they respond to the outbreak of COVID-19. Cognizant to the importance of health, safety and security of tourists and the public, Tanzania's tourism industry prepared detailed protocols with respect to control measures and procedures towards preventing the spread of COVID-19. The protocols referred to as Standard Operating Procedures (SOPs) were adopted and customized by all tourism entities in a bid to prevent the spread of COVID-19. The existence of these protocols supports the country's endorsement of Travel safe stamp by WTTC.

Chapter 2: Analysis of the Survey's Results

2.0 Introduction

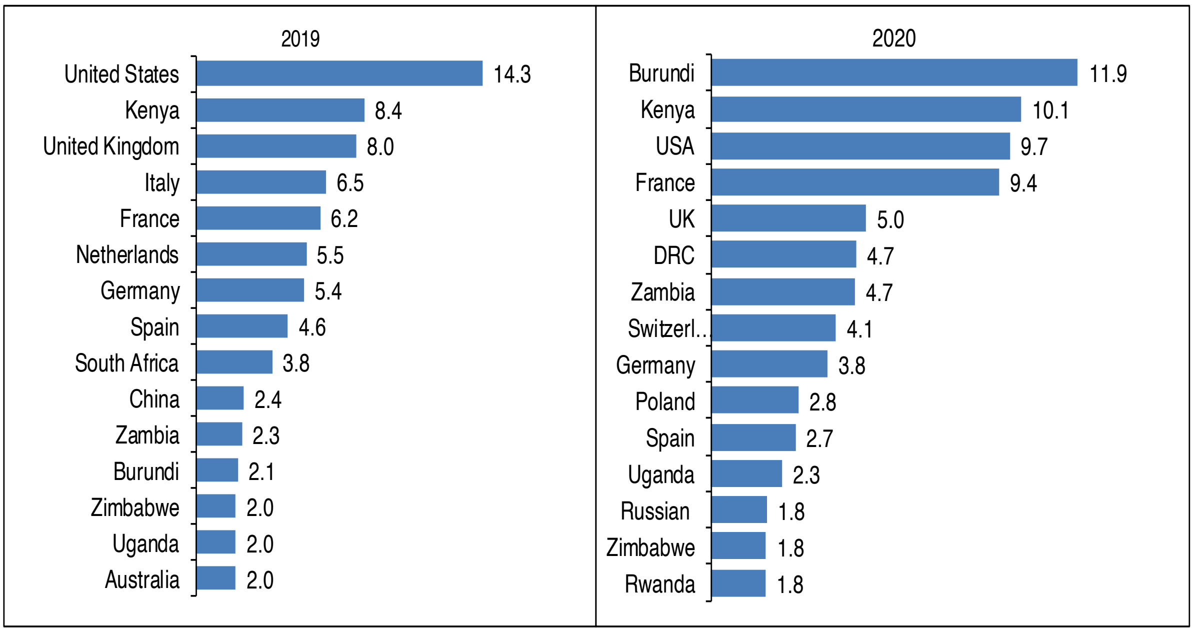
This chapter presents the key findings of the International Visitors' Exit Survey conducted for two weeks from 28th September to 11th October, 2020. The main issues covered include tourism earnings and expenditure, source markets, age group, gender and purpose of visit. Furthermore, the chapter presents a discussion on main tourism activities, visitors' impression, areas that need improvement and visitors' opinion about COVID-19.

2.1 Source markets

The top 15 source markets in 2020 accounted for about two-thirds of total visitors, similar to 2019. The majority of the visitors were from Burundi, followed by Kenya and the United States of America (**Chart 2.1**). The list of top 15 source markets has new entrants namely, DRC, Switzerland, Poland, Russian Federation and Rwanda replacing Italy, Netherlands, South Africa, China, and Australia, which were in the list of top 15 source markets in 2019. The replacement of the traditional source markets in the top 15 list is largely explained by the spread of COVID-19 pandemic, which caused many countries to close their borders.

Chart 2.1: Top 15 Source markets for the URT, 2019 and 2020

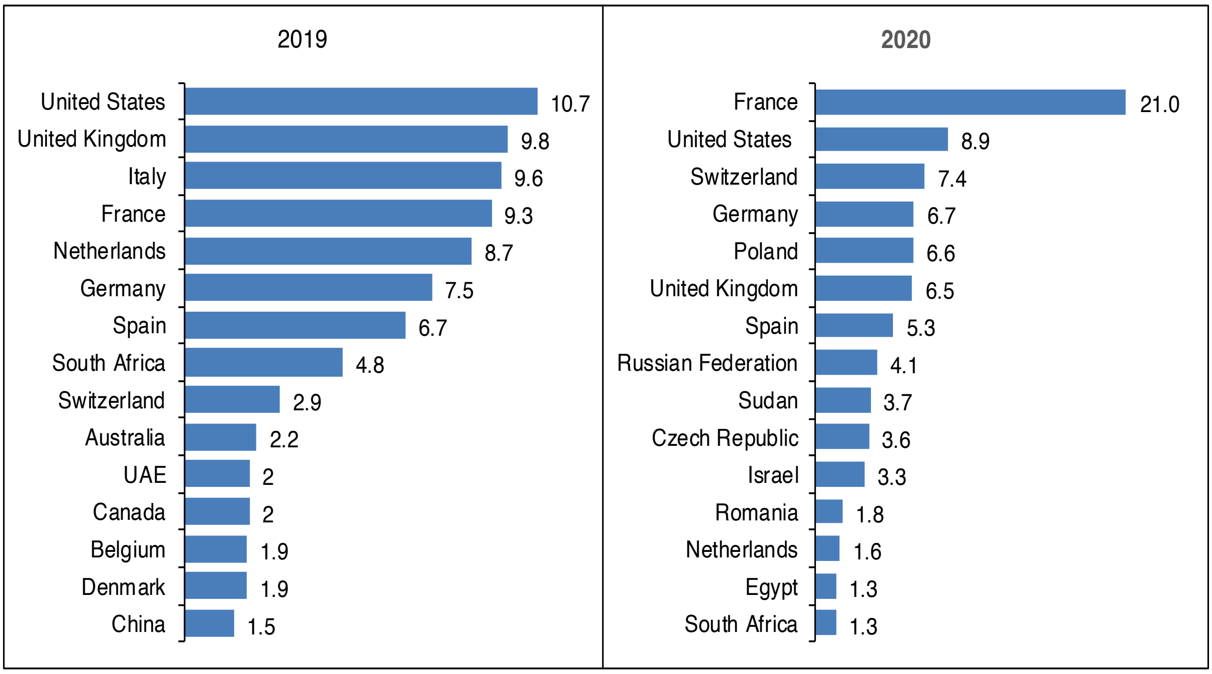
Percent



In Zanzibar, the top 15 source markets accounted for 83.2 percent in 2020 compared to 81.5 percent in 2019. Just like URT, the list of top 15 source markets also changed notably, with Poland, Russian Federation, Sudan, Czech Republic, Israel, Romania, and Egypt replacing Italy, Australia, UAE, Canada, Belgium, Denmark, and China (**Chart 2.2**).

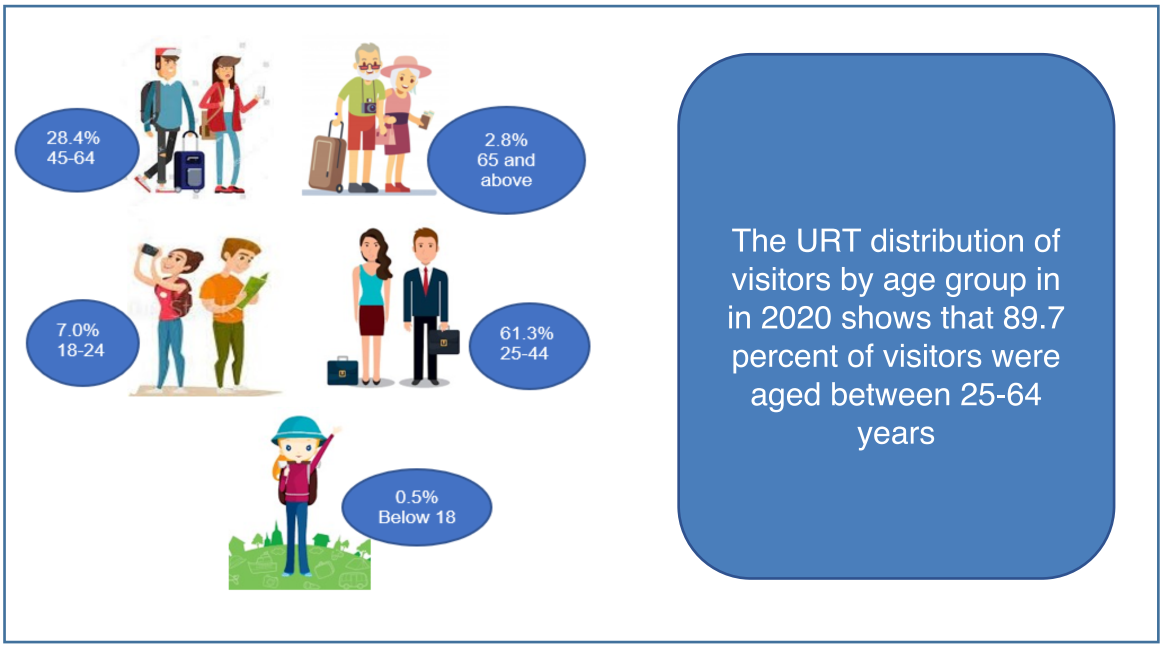
Chart 2.2: Top 15 Source markets for Zanzibar, 2019 and 2020

Percent

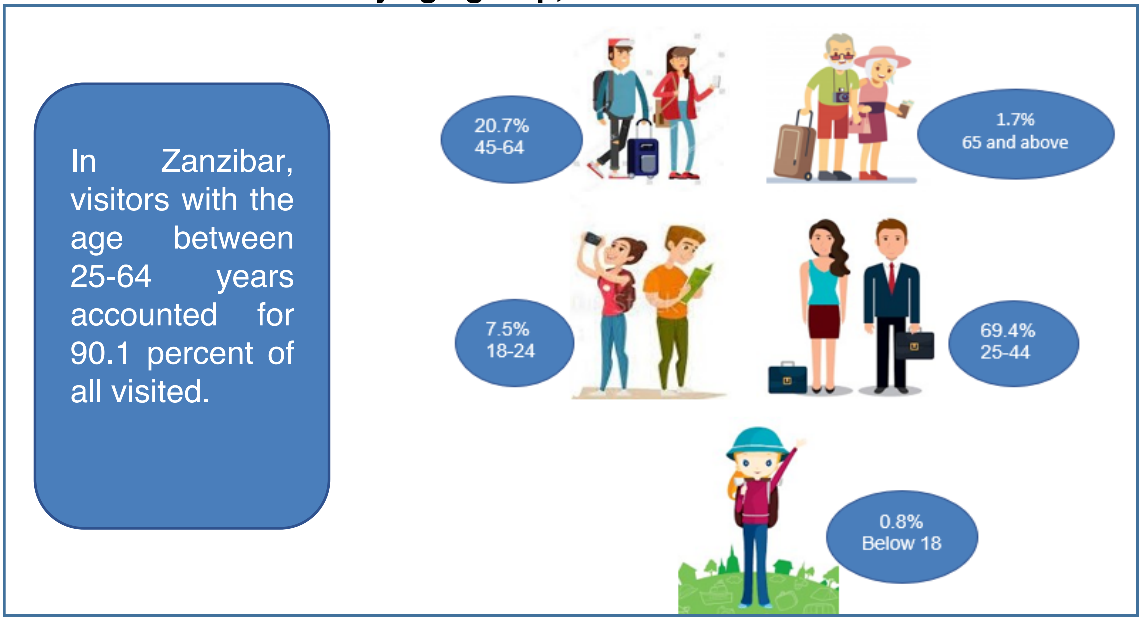


2.2 Age group

Distribution of visitors by age group, URT



Distribution of visitors by age group, Zanzibar



Distribution of visitors by age group and purpose of visit

The majority of visitors in all age groups came to Tanzania for leisure and holidays, followed by those who came to visit friends and relatives (**Table 2.1**). The dominance of visitors who came for leisure and holidays is largely attributed to the country's unique nature and wide range of tourist attractions. Similarly, in Zanzibar, most visitors in all age groups came for leisure and holidays (**Table 2.2**).

Table 2.1: Age group and purpose of visit, URT 2020

Percent

	Purpose of Visit								
Age Group	Business	Leisure and holidays	Medical treatment	Meetings and conference	Religion	Scientific and academic	Visiting friends and relatives	Volunteering	Other
Below 18	0.0	52.2	0.0	0.0	0.0	4.3	30.4	0.0	13.0
18-24	3.5	46.3	0.3	2.1	0.3	0.6	28.6	6.2	12.1
25-44	19.0	46.1	0.9	2.1	1.8	1.4	21.3	0.6	6.7
45-64	17.4	37.8	0.9	2.7	2.2	0.6	30.7	0.4	7.2
65 and above	7.3	57.7	0.7	2.2	0.7	0.0	29.2	2.2	0.0

Table 2.2: Age group and purpose of visit, Zanzibar 2020

Percent

Age group	Business	Leisure and holidays	Meetings and conference	Religion	Scientific and academic	Visiting friends and relatives	Volunteering	Other
	Purpose of visit							
Below 18	0.0	85.7	0.0	0.0	0.0	14.3	0.0	0.0
18-24	0.0	88.8	0.0	0.0	0.0	6.7	4.5	0.0
25-44	2.0	89.0	0.8	0.2	0.4	6.5	0.6	0.4
45-64	3.0	73.2	1.4	0.0	0.8	19.2	0.3	2.2
65 and above	0.0	76.7	3.3	0.0	0.0	10.0	10.0	0.0

2.3 Age group and travel party

In all age groups, a majority of the visitors to URT came alone, except for children aged below 18 years, who came with their parents accounting for 52.2 percent (**Table 2.3**). In Zanzibar, a majority of the visitors in all age groups came with their spouse except visitors aged below 18 and between 18-24 years, who came with their parents and with other friends and relatives, respectively (**Table 2.4**).

Table 2.3: Age group and travel party, URT 2020

Percent

Age group	Alone	Children	Other friends and relatives	Parents	Spouse	Spouse and children
	Travelling with					
Below 18	30.4	0.0	17.4	52.2	0.0	0.0
18-24	39.5	0.6	33.6	6.5	17.1	2.7
25-44	41.3	1.8	26.1	1.8	25.0	3.9
45-64	47.9	5.4	21.4	0.9	18.5	6.0
65 and above	51.1	1.5	13.1	0.0	32.1	2.2

Table 2.4: Age group and travel party, Zanzibar 2020

Percent

Age group	Travelling with: Alone	Children	Other friends and relatives	Parents	Spouse	Spouse and children
Below 18	0.0	0.0	14.3	85.7	0.0	0.0
18-24	12.7	0.0	47.0	4.5	31.3	4.5
25-44	15.0	1.0	28.8	2.5	46.3	6.5
45-64	25.4	5.9	27.3	2.2	32.4	6.8
65 and above	23.3	0.0	0.0	0.0	66.7	10.0

Furthermore, looking at the URT top 15 source markets about 73 percent of visitors in the age group of 65 and above, were mainly from the United States of America, Kenya, Germany and the United Kingdom (**Table 2.5**).

Table 2.5: Distribution of top 15 source markets by age group, URT 2020

Percent

	Age group: Below 18	18-24	25-44	45-64	65 and above
Burundi	10.7	17.6	16.2	15.4	4.5
Kenya	34.0	14.9	11.7	13.8	12.6
United States	6.8	14.2	10.2	15.5	36.9
France	4.9	18.3	14.4	7.3	7.2
United Kingdom	6.8	9.8	6.0	6.3	11.7
DRC	2.9	1.0	6.9	6.9	0.9
Zambia	0.0	2.0	7.0	6.3	1.8
Switzerland	11.7	2.0	4.5	7.0	7.2
Germany	5.8	3.4	4.6	5.2	11.7
Poland	1.9	1.0	4.0	4.2	0.9
Spain	1.9	1.7	4.2	3.4	0.0
Uganda	1.0	1.7	3.4	2.8	1.8
Russian Federation	2.9	1.4	2.2	3.1	0.9
Zimbabwe	0.0	1.7	2.9	1.9	0.0
Rwanda	8.7	9.2	1.7	1.0	1.8

In the case of Zanzibar, the majority of the visitors from all countries in the list of top 15 source markets were aged between 25 and 64 years and mostly from France, the United States of America and Switzerland (**Table 2.6**).

Table 2.6: Distribution of top 15 source markets by age group, Zanzibar 2020

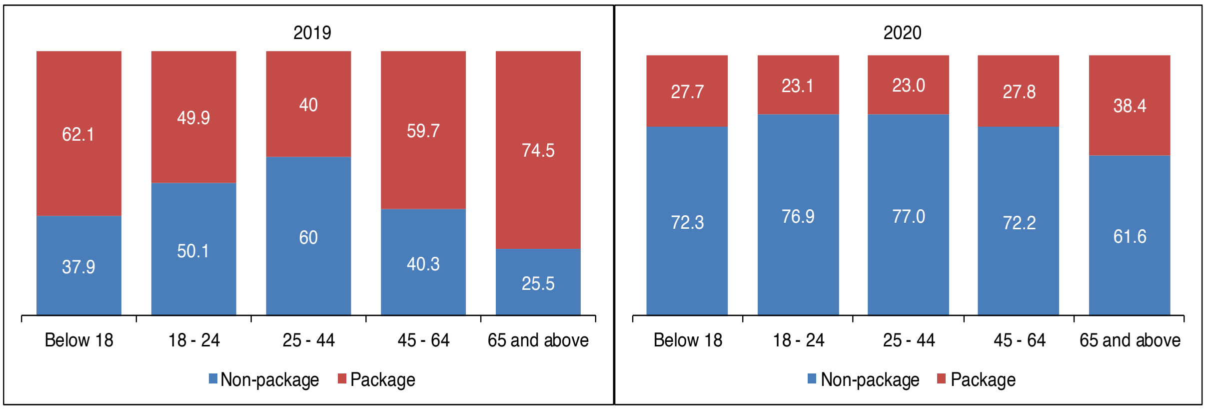
Percent

	Age group				
	Below 18	18-24	25-44	45-64	65 and above
France	9.4	40.4	28.8	13.1	14.7
United States	5.7	13.8	9.9	11.6	26.5
Switzerland	15.1	2.8	7.8	13.1	8.8
Germany	9.4	2.8	7.4	10.7	14.7
Poland	1.9	2.8	7.7	12.2	0.0
United Kingdom	9.4	6.4	7.9	7.6	11.8
Spain	3.8	3.7	7.1	6.1	0.0
Russian Federation	5.7	3.7	4.0	8.3	2.9
Sudan	3.8	5.5	4.9	3.1	2.9
Czech Republic	1.9	9.2	3.4	5.2	8.8
Israel	26.4	3.7	2.4	4.9	5.9
Romania	0.0	0.0	2.9	1.2	0.0
Netherlands	3.8	2.8	1.8	1.8	2.9
Egypt	0.0	1.8	2.2	0.3	0.0
South Africa	3.8	0.9	2.0	0.6	0.0

Further, considering travel arrangements, the results show that under all age groups, the majority of the visitors to URT came under the non-package tour arrangement, while in 2019 the majority of visitors who came under the non-package tour were aged between 18 and 44 years (**Chart 2.3**).

Chart 2.3: Tour arrangement by age group, URT

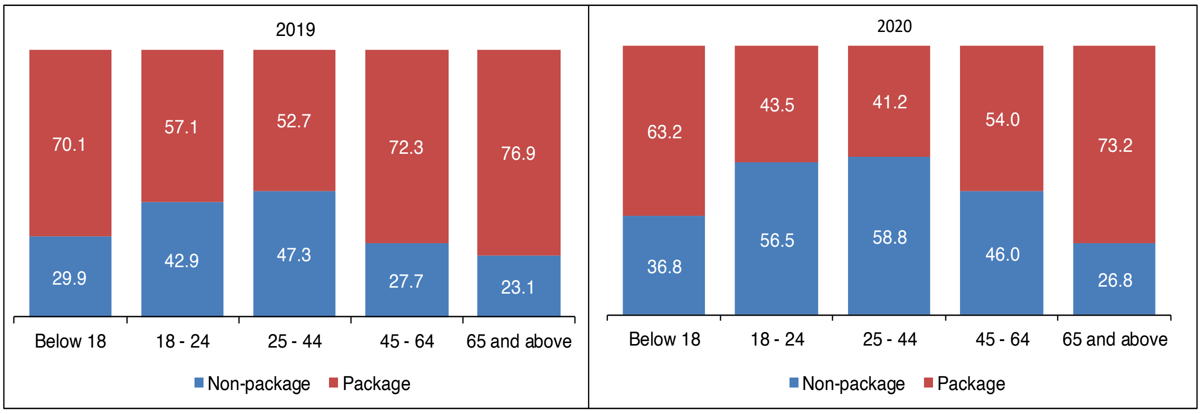
Percent



In Zanzibar, majority of the visitors were aged 65 years and above and those below 18 years came under the package tour arrangement, while visitors whose age was between 18 to 44 years came under the non-package tour arrangement. In 2019, most of the visitors in all age groups came under the package tour arrangement (**Chart 2.4**).

Chart 2.4: Tour arrangement by age group, Zanzibar

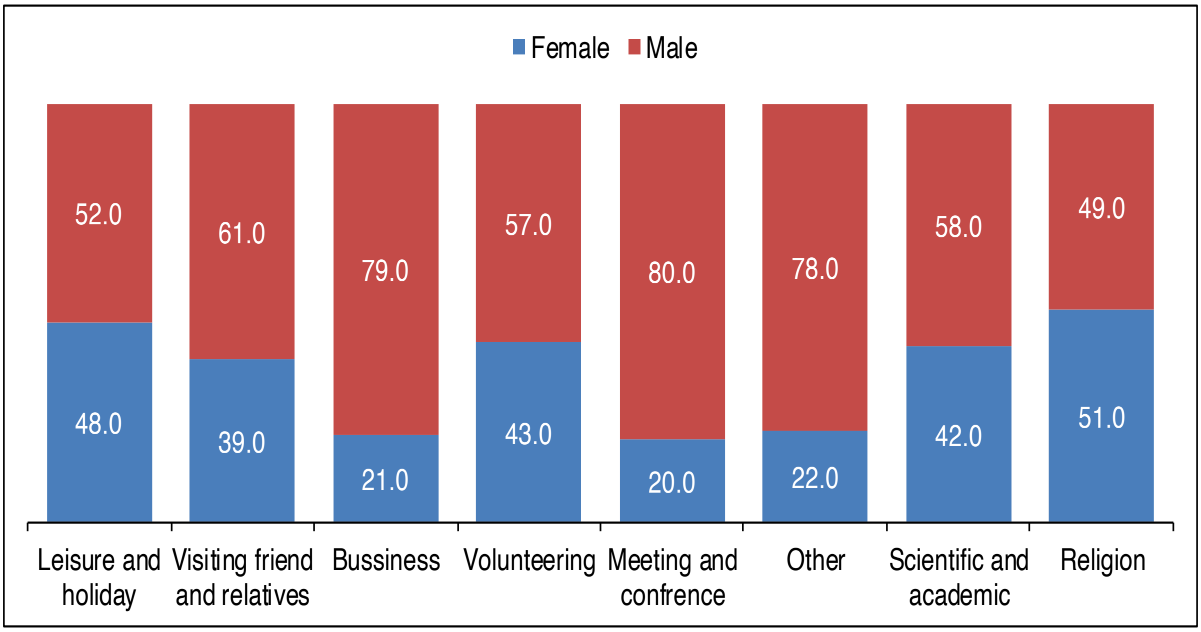
Percent



In 2020, the distribution of visitors by gender was far different from the previous surveys, with males accounting for 61.0 percent of all visitors, while females accounted for 39 percent. Female visitors mainly came for religion, leisure and holidays; as well as volunteering. Male visitors were dominant in business, and meetings and conferences (**Chart 2.5**).

Chart 2.5: Gender by purpose of visit, URT

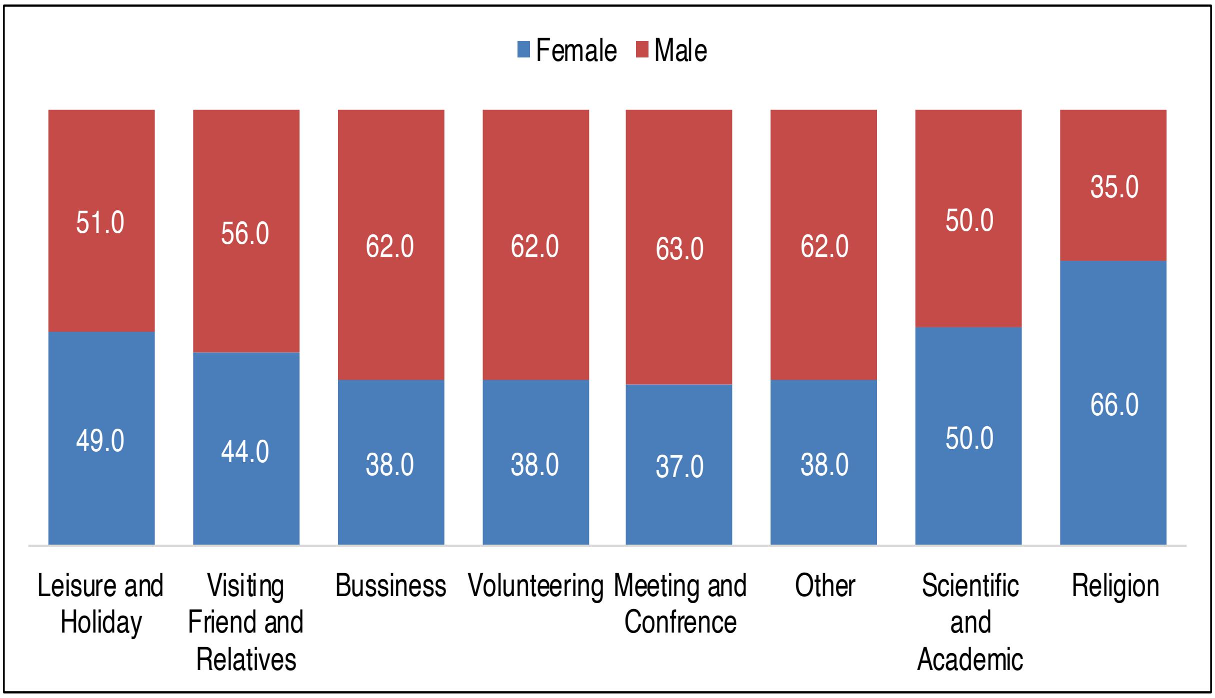
Percent



In Zanzibar, male visitors mainly came for meetings and conferences, business, as well as volunteering. Female visitors mainly came for religion, scientific and academic and holidays (**Chart 2.6**).

Chart 2.6: Gender by purpose of visit, Zanzibar

Percent

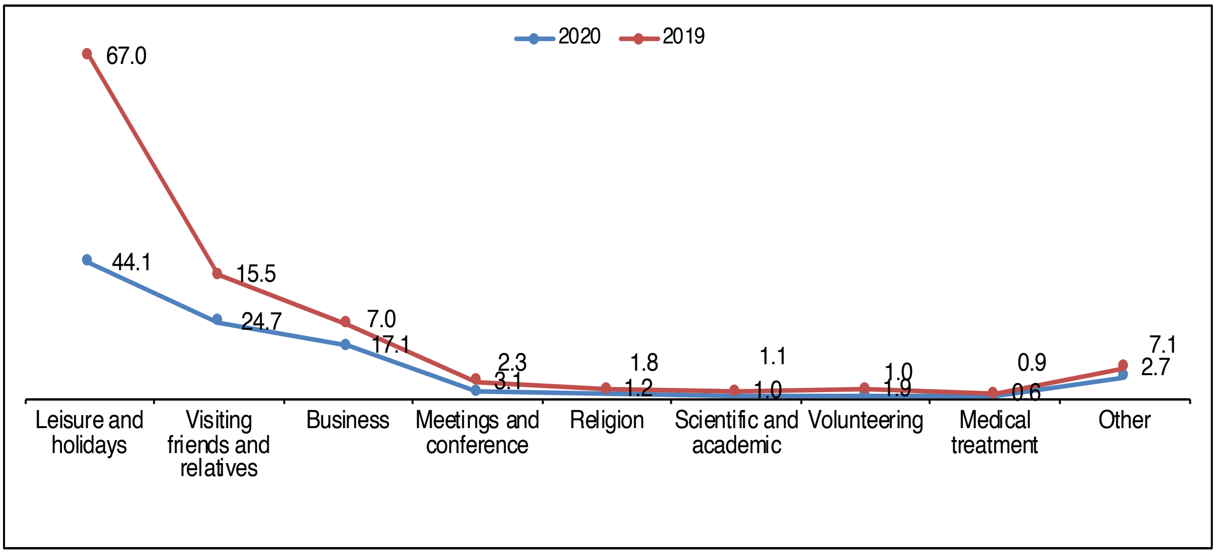


2.4 Purpose of Visit

Visitors who came for leisure and holidays accounted for 44.1 percent, followed by those who came to visit friends and relatives (**Chart 2.7**). The same pattern was observed in the previous surveys. However, there was a sharp decline of visitors who came for leisure and holidays from 67.0 percent in 2019 to 44.1 percent in 2020. The decline is attributed to COVID-19 pandemic, which disrupted travel plans of international travellers. Consequently, visitors who came for business purposes in 2020 more than doubled when compared with visitors of 2019. Other purposes include transit and VISA application in foreign embassies located in Tanzania mostly for visitors from neighbouring countries.

Chart 2.7: Purpose of visit, United Republic of Tanzania, 2019 and 2020

Percent



Visitors from France, the United States of America and Switzerland mostly came to URT for leisure and holidays, while visitors from Kenya and Burundi came mainly to visit friends and relatives. Business visitors were largely from DRC and Zambia (**Table 2.7**).

Table 2.7: Distribution of Top 15 Source Markets by Purpose of Visit, URT

Percent

	Purpose of Visit								
	Business	Leisure and holidays	Visiting friends and relatives	Meetings and conference	Medical treatment	Religion	Volunteering	Scientific and academic	Other
Burundi	13.7	1.0	29.1	2.6	22.2	16.0	0.0	11.8	54.2
Kenya	5.8	2.5	29.4	33.3	61.1	42.7	2.9	11.8	13.0
United States	7.1	20.6	6.1	11.5	2.8	34.7	25.7	5.9	1.0
France	1.4	26.6	2.6	9.0	2.8	0.0	2.9	0.0	1.0
DRC	24.1	0.4	5.3	2.6	5.6	1.3	0.0	5.9	2.3
United Kingdom	1.5	8.9	7.5	10.3	0.0	0.0	31.4	5.9	1.3
Zambia	22.4	0.0	5.5	0.0	2.8	5.3	2.9	5.9	6.3
Switzerland	0.2	10.4	1.2	12.8	0.0	0.0	14.3	11.8	2.3
Germany	0.8	8.3	4.3	2.6	0.0	0.0	14.3	5.9	0.0
Poland	1.1	7.2	2.0	0.0	0.0	0.0	0.0	0.0	0.0
Spain	0.6	7.5	1.3	0.0	0.0	0.0	0.0	0.0	0.3
Uganda	8.0	0.3	1.8	5.1	2.8	0.0	5.7	11.8	9.3
Russian Federation	0.0	5.2	0.8	0.0	0.0	0.0	0.0	0.0	0.0
Zimbabwe	9.5	0.8	0.9	0.0	0.0	0.0	0.0	0.0	1.3
Rwanda	4.0	0.3	2.0	10.3	0.0	0.0	0.0	23.5	7.6

In Zanzibar, about 85.6 percent of visitors in 2020 came for leisure and holidays compared to 88.0 percent in 2019. France was the leading source market under leisure and holidays, as well as in meetings and conference. Those visiting friends and relatives were mainly from the United Kingdom, Poland and Germany (**Chart 2.8** and **Table 2.8**).

Chart 2.8: Purpose of Visit Zanzibar, 2019 and 2020

Percent

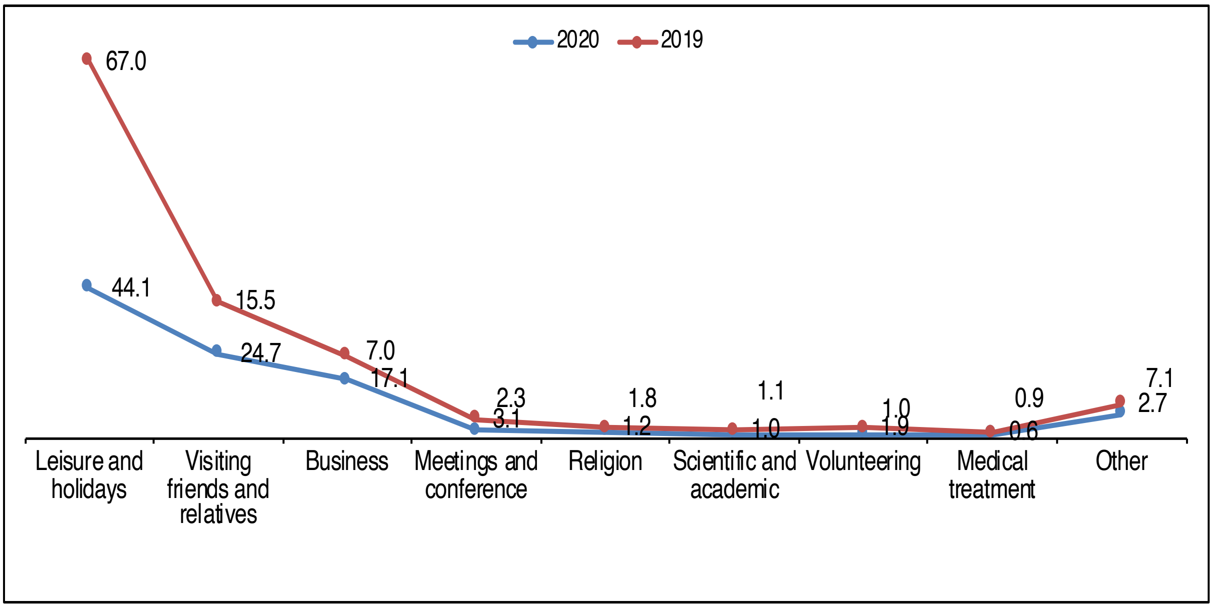


Table 2.8: Distribution of Top 15 Source Markets by Purpose of Visit, Zanzibar 2020

Percent

	Purpose of visit							
	Business	Leisure and holidays	Visiting friends and relatives	Meetings and conference	Volunteering	Scientific and academic	Religion	Other
France	21.1	26.7	9.9	50.0	6.7	0.0	0.0	0.0
United States	0.0	10.6	11.6	0.0	26.7	16.7	0.0	0.0
Switzerland	5.3	8.5	8.3	0.0	0.0	33.3	0.0	100.0
Germany	5.3	7.6	12.4	0.0	20.0	0.0	0.0	0.0
Poland	5.3	7.3	16.5	0.0	0.0	0.0	0.0	0.0
United Kingdom	5.3	6.9	19.0	0.0	6.7	16.7	0.0	0.0
Spain	5.3	6.4	6.6	0.0	0.0	0.0	0.0	0.0
Russian Federation	0.0	5.1	5.8	0.0	0.0	0.0	0.0	0.0
Sudan	0.0	4.4	2.5	0.0	0.0	33.3	100.0	0.0
Czech Republic	0.0	4.5	0.0	0.0	26.7	0.0	0.0	0.0
Israel	0.0	5.3	2.5	25.0	0.0	0.0	0.0	0.0
Romania	15.8	2.2	0.0	0.0	0.0	0.0	0.0	0.0
Netherlands	5.3	1.8	1.7	12.5	6.7	0.0	0.0	0.0
Egypt	31.6	1.4	0.0	0.0	0.0	0.0	0.0	0.0
South Africa	0.0	1.4	3.3	12.5	6.7	0.0	0.0	0.0

2.5 Travel Arrangement

The choice of travel arrangement depends on a number of factors including destination (short or long haul), purpose of visit and whether it is first-time or repeat visit. The majority of visitors to URT came under the non-package travel arrangement. Similar pattern was observed in the last five years with the exception of 2019 (**Chart 2.9**). Visitors from long haul source markets such as Switzerland, Spain, Poland and the United States of America, mainly came under the package tour arrangement. Visitors from the neighbouring countries such as Burundi, Zambia, DRC, Uganda and Kenya ranked higher in the non-package travel arrangement (**Table 2.9**).

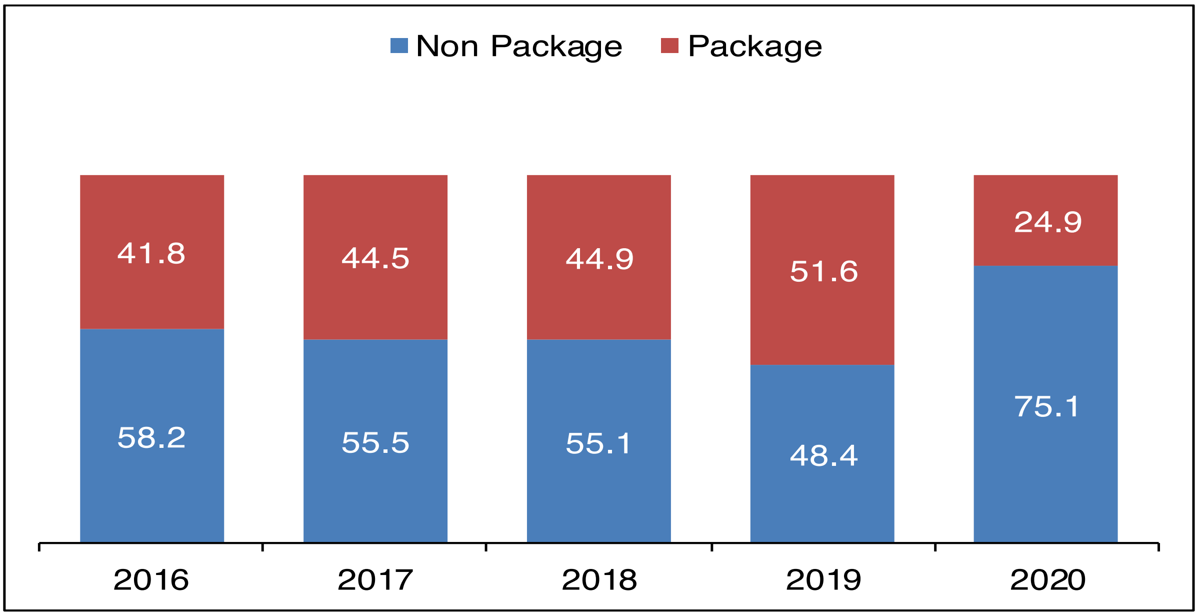
Table 2.9: Top 15 Source Markets by Travel Arrangement, URT

Percent

	Tour arrangement	
Top 15 Source Markets	**Non package**	**Package**
Burundi	100.0	0.0
Kenya	99.0	1.0
United States	50.4	49.6
France	53.0	47.0
United Kingdom	82.9	17.1
DRC	100.0	0.0
Zambia	100.0	0.0
Switzerland	34.0	66.0
Germany	60.3	39.7
Poland	34.8	65.2
Spain	29.3	70.7
Uganda	100.0	0.0
Russia	51.1	48.9
Zimbabwe	98.9	1.1
Rwanda	98.8	1.2

Chart 2.9: Visitors by tour arrangement, URT

Percent



In Zanzibar, 45.6 percent of visitors came under the package tour arrangement and the leading source markets were Switzerland, Poland and Spain. With respect to the non-package tour arrangement, the leading countries were Egypt, the United Kingdom and South Africa (**Table 2.10**).

Table 2.10: Top 15 Source Markets by Travel Arrangement, Zanzibar

Percent

Top 15 source market	Travel arrangement	
	Non-package	Package
France	54.4	45.6
United States	51.3	48.8
Switzerland	31.8	68.2
Germany	51.3	48.7
Poland	32.2	67.8
United Kingdom	79.5	20.5
Spain	33.0	67.0
Russian Federation	55.4	44.6
Sudan	68.2	31.8
Czech Republic	42.2	57.8
Israel	50.8	49.2
Romania	56.3	43.8
Netherlands	62.1	37.9
Egypt	91.7	8.3
South Africa	70.8	29.2

Most of the visitors who came for leisure and holidays used the package tour arrangement, while under the non-package tour arrangement most of the visitors came for visiting friends and relatives, business as well as leisure and holidays (**Table 2.11**).

Table 2.11: Travel arrangement by purpose of visit

Percent

	Travel arrangement	
Purpose of the visit	Non-package	Package
Business	21.3	4.1
Leisure and holidays	29.2	89.2
Medical treatment	31.2	5.1
Meetings and conference	2.9	0.4
Religion	2.2	0.4
Scientific and academic	1.5	0.1
Visiting friends and relatives	1.3	0.0
Volunteering	1.1	0.1
Other	9.3	0.6
Total	100.0	100.0

2.6 First-time and repeat visits.

The survey's results indicate that 41.1 percent of the interviewed visitors were first timers, while the remaining were repeat visits. About 82.1 percent of first timers came under the package tour arrangement, whereas most of the repeat visitors came under the non-package tour arrangement. In Zanzibar, majority of first timer visitors come under both the package and non-package tour arrangement (**Chart 2.10**).

Chart 2.10: First-time and repeat visitors

Percent

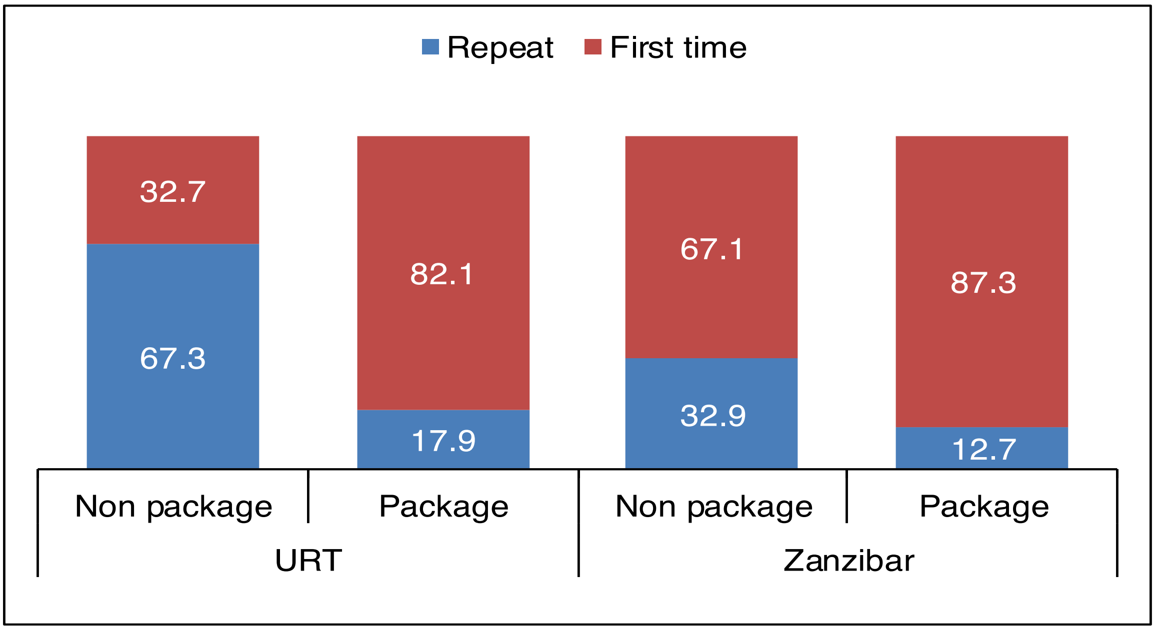
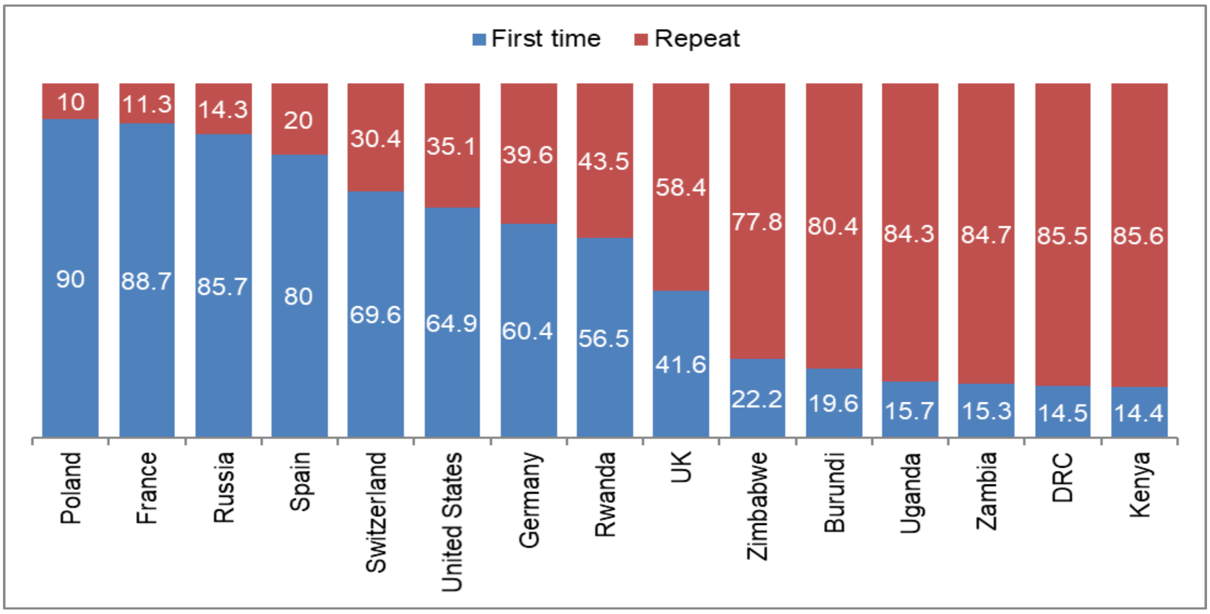


Chart 2.11 shows that first-time visitors from the top 15 source markets were mainly from Poland, France, Russia, Spain and Switzerland. Conversely, repeat visitors were mainly from neighbouring countries.

Chart 2.11: Proportion of first-time and repeat visitors by top 15 source markets, URT

Percent



The main purposes of visit for first-time visitors were leisure and holidays and visiting friends and relatives, while repeat visitors mainly came for business and visiting friends and relatives (**Table 2.12**).

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

Percent

Purpose of visit	Repeat visitors	First time visitors
Business	29.8	9.2
Leisure and holidays	13.9	63.7
Medical treatment	1.5	0.5
Meetings and conference	3.4	2.3
Religion	1.7	1.6
Scientific and academic	1.2	0.9
Visiting friends and relatives	38.9	13.6
Volunteering	0.6	1.5
Other	9.0	6.7
Total	100.0	100.0

In Zanzibar, visitors from all top 15 source markets, with the exception of South Africa, came for the first-time (**Chart 2.12**). Most of both first-time visitors and repeat visitors came for leisure and holidays as well as visiting friends and relatives (**Table 2.13**).

Chart 2.12: First-time and repeat visitors by top 15 source markets, Zanzibar

Percent

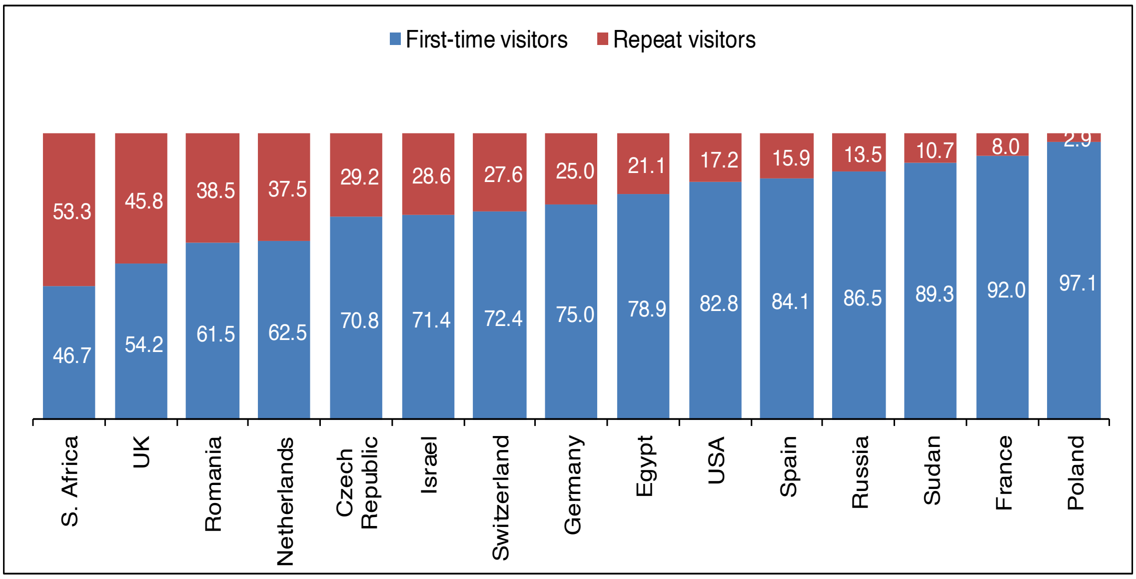


Table 2.13: First-time visitors and repeat visitors by purpose of visit, Zanzibar

Percent

Purpose of the visit	Repeat visitors	First time visitors
Business	8.8	1.8
Leisure and holidays	52.2	90.4
Meetings and conference	4.4	0.4
Religion	0.0	0.1
Scientific and academic	1.8	0.3
Visiting friends and relatives	29.2	5.5
Volunteering	2.7	1.0
Other	0.9	0.5
Total	100.0	100.0

2.7 Departure points

The majority of visitors departed through JNIA followed by AAKIA and KIA. Tunduma and Manyovu were the main land departure border posts used by visitors, while Namanga, Mtukula and Horohoro were the least used (**Table 2.14**).

Table 2.14: Visitors by departure points, URT

Percent

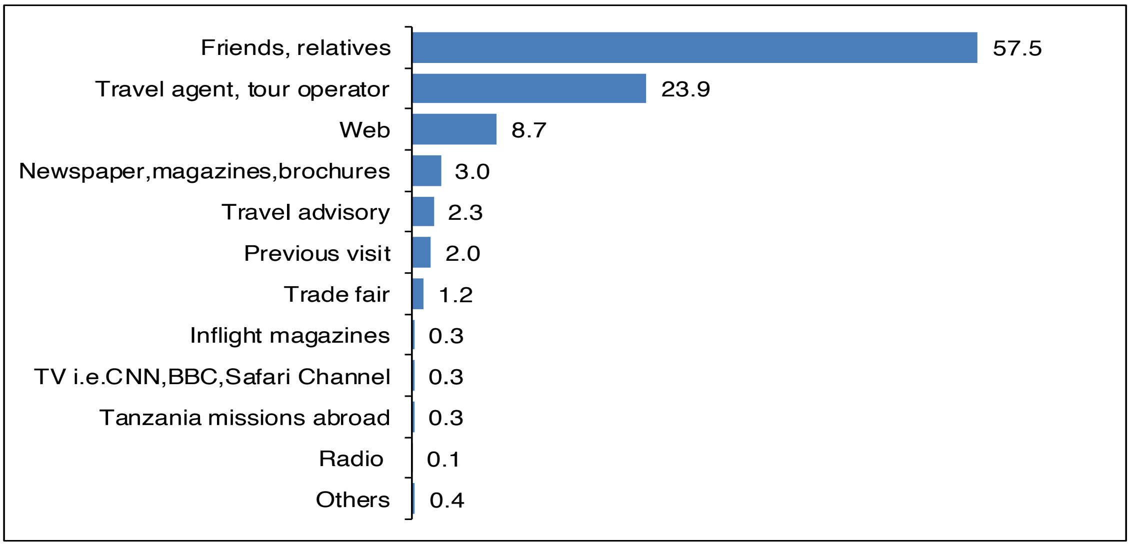
Exit point	Percentage share
AAKIA	23.2
JNIA	24.7
KIA	18.2
MANY	10.8
TUN	10.0
NAM	5.7
MTK	3.8
HOR	3.6
Total	100.0

2.8 Source of information

About 58 percent of the visitors acquired information about destination Tanzania from friends and relatives. Other important sources of information about Tanzania were travel, web, as well as travel agents and tour operators (**Chart 2.13**).

Chart 2.13: Source of information about destination Tanzania

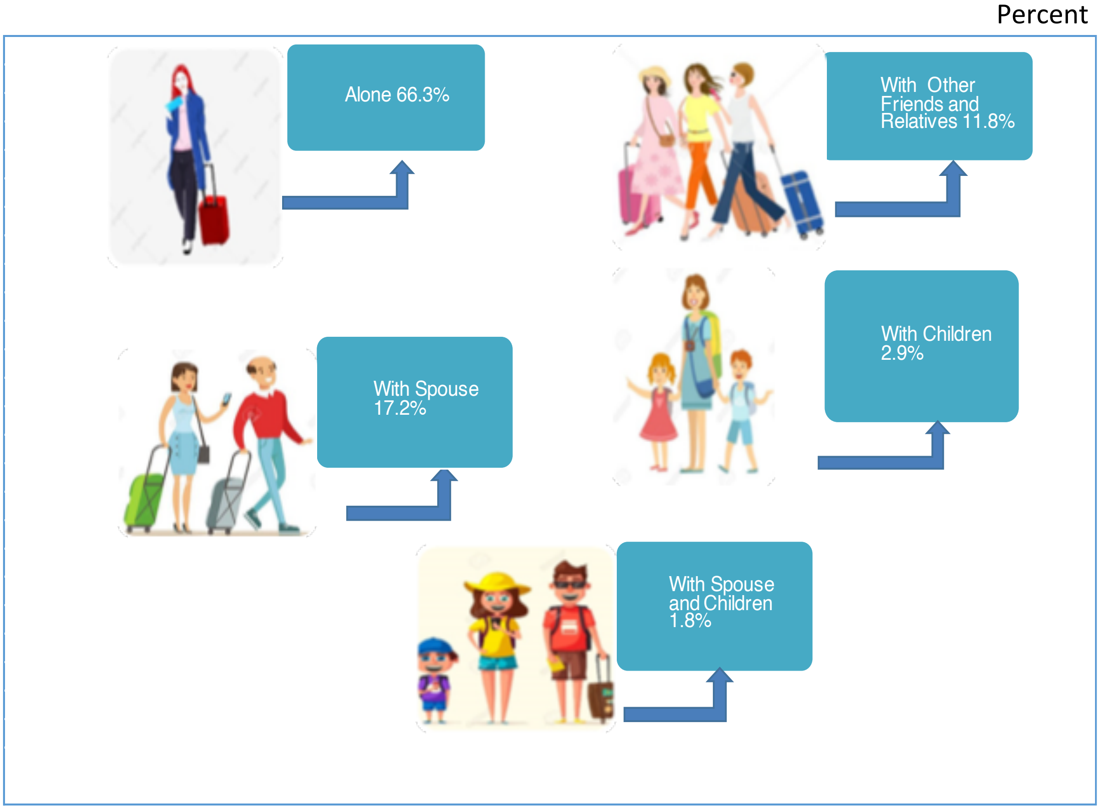
Percent



2.9 Travel party

Similar to the preceding surveys, the 2020 survey findings depict that the majority of visitors travelled alone. Those who travelled with spouses and children account for the least share of travel parties (**Chart 2.14**).

Chart 2.14: Travel party, United Republic of Tanzania 2020



In Zanzibar, the majority of the visitors came with their spouse followed by those who travelled alone. Visitors who travelled with their spouse and children were the least (**Chart 2.15**).

Chart 2.15: Travel party, Zanzibar 2020

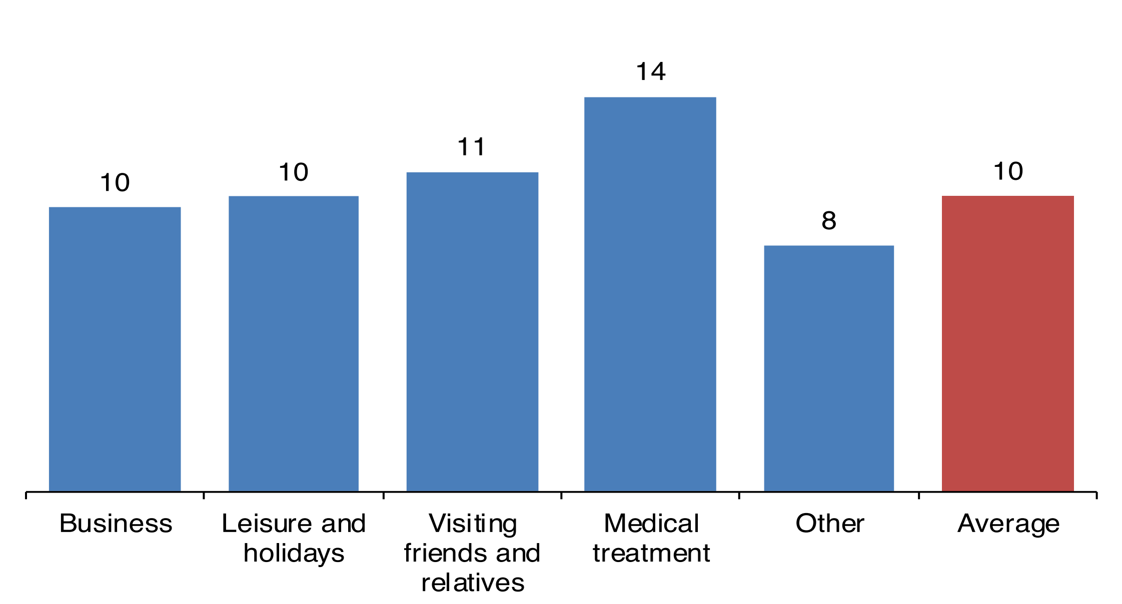
Percent

2.10 Nights spent and length of stay

2.10.1 Length of stay

The overall average length of stay for visitors to the URT was 10 nights in 2020 compared to an average of 13 nights in 2019 (**Chart 2.16**). With the exception of 2019, the trend remained unchanged at 10 nights for the last eight years.

Chart 2.16: Average length of stay by purpose of visit, URT



Visitors from the long-haul source markets stayed the longest. Visitors from Germany stayed for an average of 16 nights, followed by those from the United States of America who stayed for 15 nights. Visitors from Switzerland and Poland stayed for 14 nights. On the other hand, visitors from African countries namely, Burundi, Kenya, Zambia and Zimbabwe stayed for the shortest period as most of them came for business and visiting friends and relatives (**Table 2.15**).

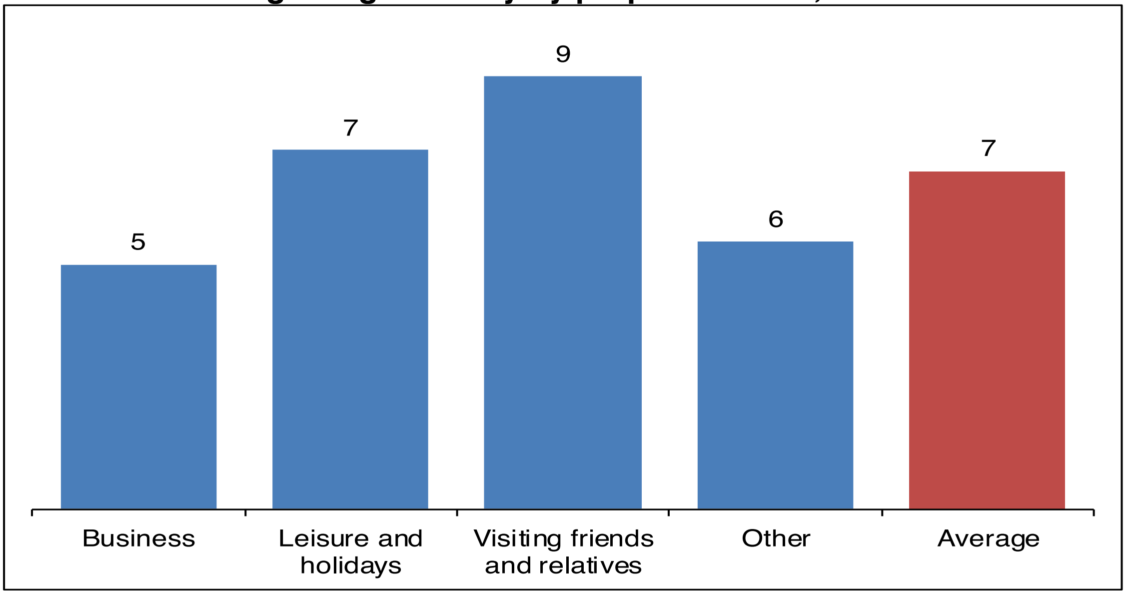
Table 2.15: Length of stay by purpose of visit and top 15 source markets, URT

Percent

Country of residence	Business	Leisure and holidays	Visiting friends and relatives	Medical treatment	Other	Overall average
Burundi	4	5	5	5	2	4
Kenya	7	6	5	7	4	6
United States of America	11	12	14	21	16	15
France	5	12	11	21	1	10
United Kingdom	11	12	15	-	12	13
Congo, The Democratic	9	12	10	-	6	9
Zambia	7	-	5	-	4	5
Switzerland	14	12	11	-	18	14
Germany	16	12	14	-	20	16
Poland	16	12	14	-	-	14
Spain	14	10	10	-	-	11
Uganda	8	9	22	-	5	11
Russian Federation	-	12	13	-	-	13
Zimbabwe	7	4	3	-	5	5
Rwanda	7	11	12	-	8	10
Overall average	10	10	11	14	8	10

For the case of Zanzibar, the overall average length of stay was 7 nights in 2020. The trend for the past eight years showed that the average length of stay remained unchanged at 6 nights. Visitors visiting friends and relatives stayed longer with an average of 9 nights, while visitors under business purpose stayed the shortest with an average of 5 nights (**Chart 2.17**).

Chart 2.17: Average length of stay by purpose of visit, Zanzibar



Visitors from Sudan and Israel who came to visit friends and relatives stayed the longest with an average length of stay of 12 and 10 nights, respectively. Business visitors from Germany stayed for 15 nights (**Table 2.16**).

Table 2.16: Length of stay by purpose of visit and top 15 source markets, Zanzibar.

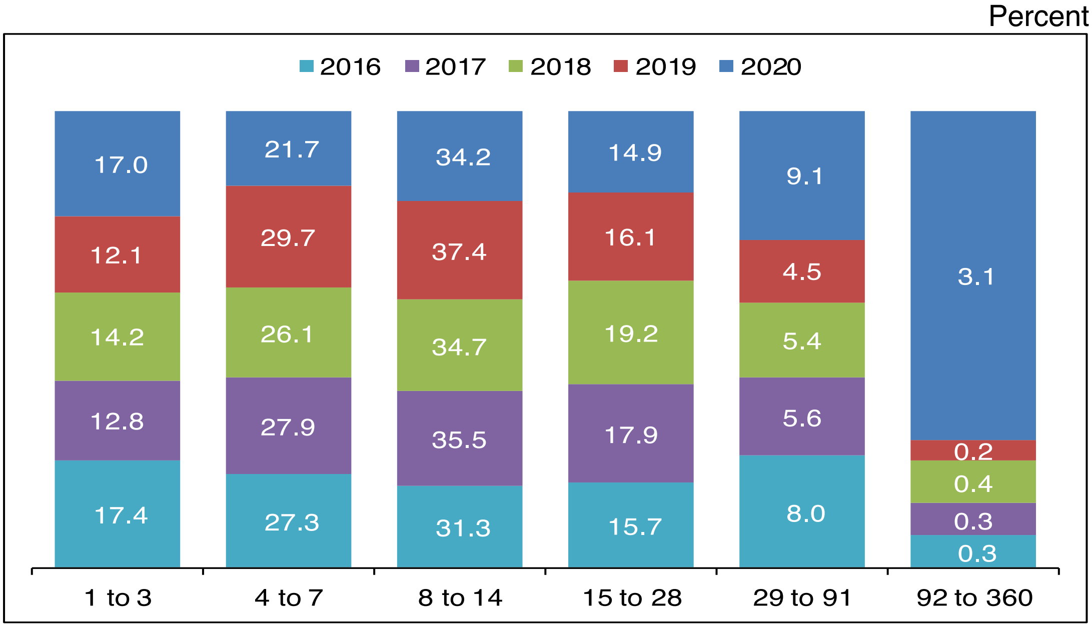
Percent

Country of residence	Business	Leisure and Holidays	Visiting Friends and relatives	other	Overall average
France	2	8	7	-	6
United States of America	-	5	4	10	6
Switzerland	2	6	6	5	5
Germany	15	7	10	6	10
Poland	8	8	6	-	7
United Kingdom	3	8	8	4	6
Spain	5	7	5	-	6
Russian Federation	-	8	9	-	9
Sudan	-	10	18	9	12
Czech Republic	-	8	-	-	8
Israel	-	6	14	-	10
Romania	7	7	-	-	7
Netherlands	6	7	15	3	8
Egypt	1	6	-	-	4
South Africa	2	11	6	2	5
Overall average	5	7	9	6	7

2.10.2 Nights spent.

The survey findings revealed that about one-third of visitors spent between 8 and 14 nights, followed by those who stayed between 4 and 7 nights. Similar pattern was observed over the last four years, with an increasing number of visitors staying longer. Small proportion of visitors (12.2 percent) stayed 29 nights and above (**Chart 2.18**).

Chart 2.18: Distribution of visitors by night spent, URT



More than half of visitors who came for leisure and holidays as well as scientific and academic purposes spent between 8 and 14 and 29 and 91 nights, respectively. One-third of business visitors stayed between 15 to 28 nights (**Table 2.17**).

Table 2.17: Distribution of visitors by nights spent and purpose of visit, URT

Percent

	Purpose of visit								
Nights	Business	Leisure and holidays	Visiting friends and relatives	Meetings and conference	Medical treatment	Religion	Scientific and academic	Volunteering	Other
1 to 3	22.7	2.7	24.6	18.2	16.7	18.4	3.7	0.0	69.2
4 to 7	32.7	17.4	22.4	30.0	23.8	41.4	5.6	6.3	16.3
8 to 14	21.7	53.7	20.6	25.5	23.8	8.0	7.4	22.9	6.4
15 to 28	9.5	20.4	11.5	14.5	11.9	27.6	14.8	14.6	3.5
29 to 91	9.6	4.8	15.2	5.5	16.7	2.3	57.4	45.8	3.5
92 to 360	3.8	1.0	5.8	6.4	7.1	2.3	11.1	10.4	1.2

About half of the visitors stayed in Zanzibar between 8 and 14 nights, followed by those who stayed for between 15 and 28 nights. A similar pattern was observed in the last four surveys with increased proportion of visitors staying from 15 nights and above (**Chart 2.19** and **Table 2.18**).

Chart 2.19: Distribution of visitors by nights spent, Zanzibar

Percent

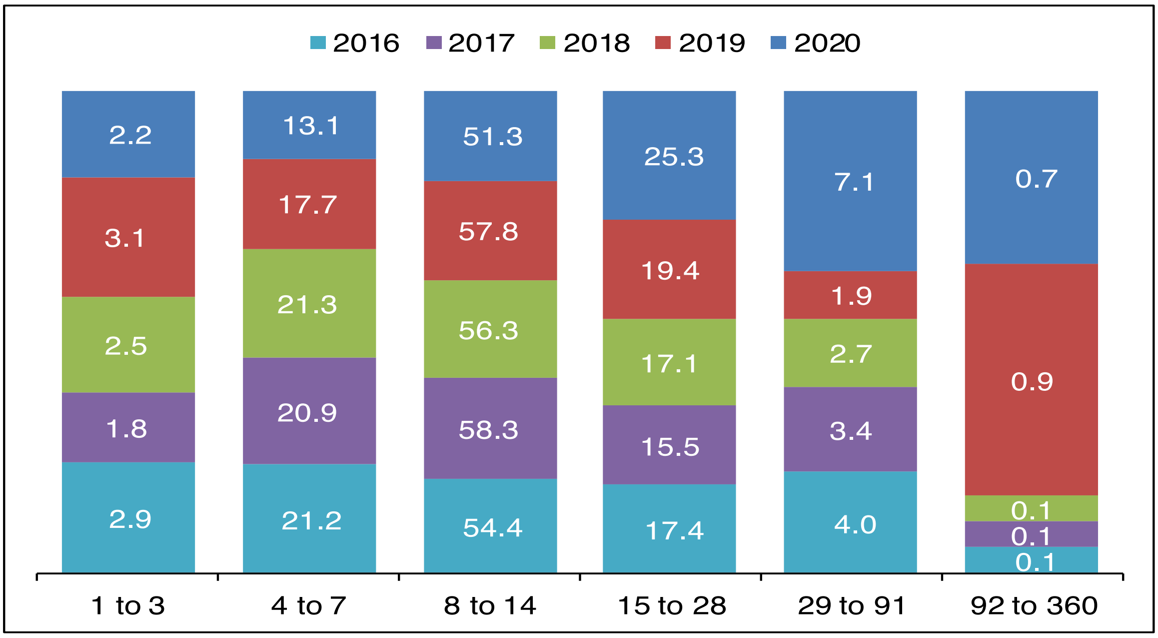


Table 2.18: Distribution of visitors by the nights spent and purpose of visit, Zanzibar.

Percent

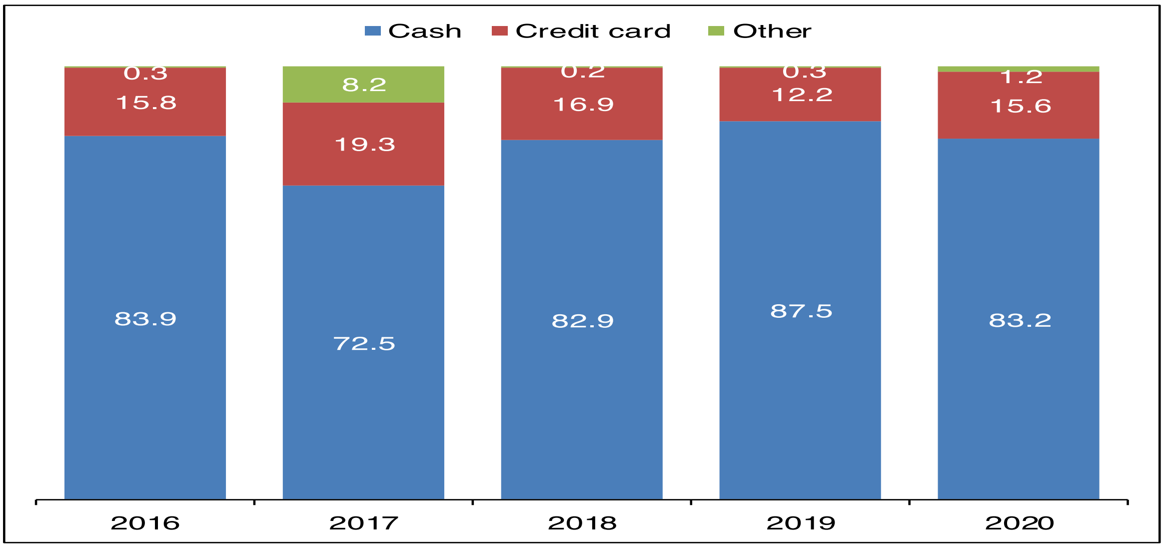
	Purpose of visit							
Nights	Business	Leisure and holidays	Visiting friends and relatives	Meetings and conference	Religion	Scientific and academic	Volunteering	Other
1 to 3	22.2	1.2	4.9	31.3	0.0	0.0	0.0	0.0
4 to 7	25.0	11.7	15.9	56.3	0.0	37.5	16.7	61.5
8 to 14	36.1	53.0	53.0	12.5	0.0	12.5	11.1	30.8
15 to 28	5.6	27.4	12.2	0.0	100.0	37.5	27.8	0.0
29 to 91	5.6	6.5	9.8	0.0	0.0	12.5	44.4	7.7
92 to 360	5.6	0.2	4.3	0.0	0.0	0.0	0.0	0.0

2.11 Mode of payment

Cash remains the main mode of payment in Tanzania, accounting for an average of 82.0 percent over the last five years, followed by credit/debit cards with an average of 16.0 percent. Limited awareness and availability of point-of-sale terminals at most consumption points continue to be the main reason for the prominence of cash payment. However, other modes of payment including mobile money, world remit and simbanking increased marginally in 2020 (**Chart 2.20**).

Chart 2.20: Mode of Payment, URT

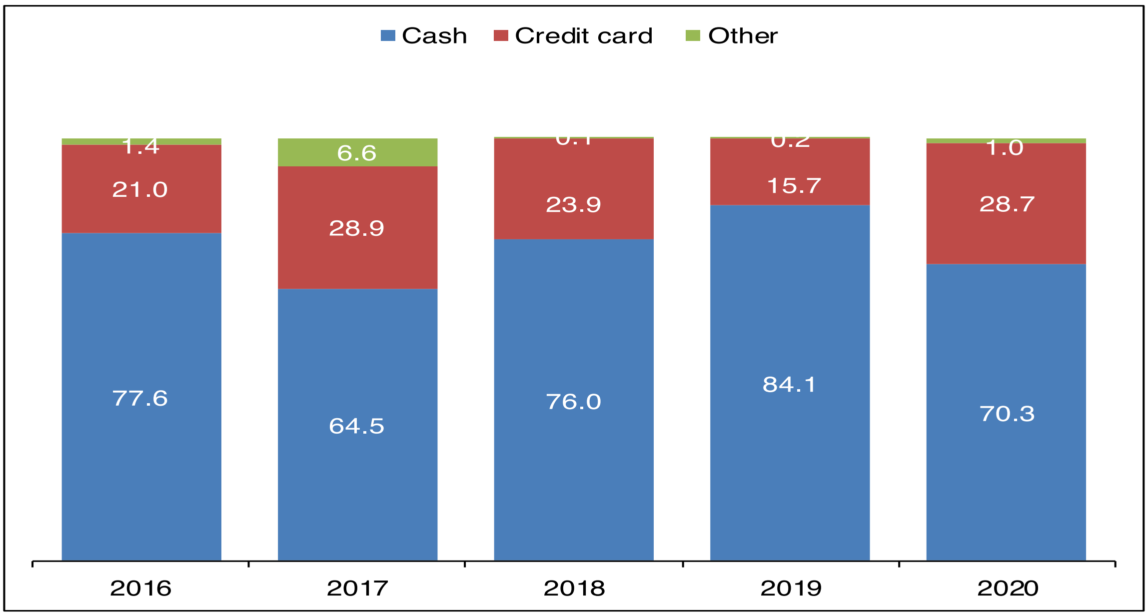
Percent



Cash was also the major mode of payment used in Zanzibar with an average of 74.5 percent over the last five years. However, payment through credit card is more prominent in Zanzibar compared to URT (**Chart 2.21**).

Chart 2.21: Mode of payment, Zanzibar

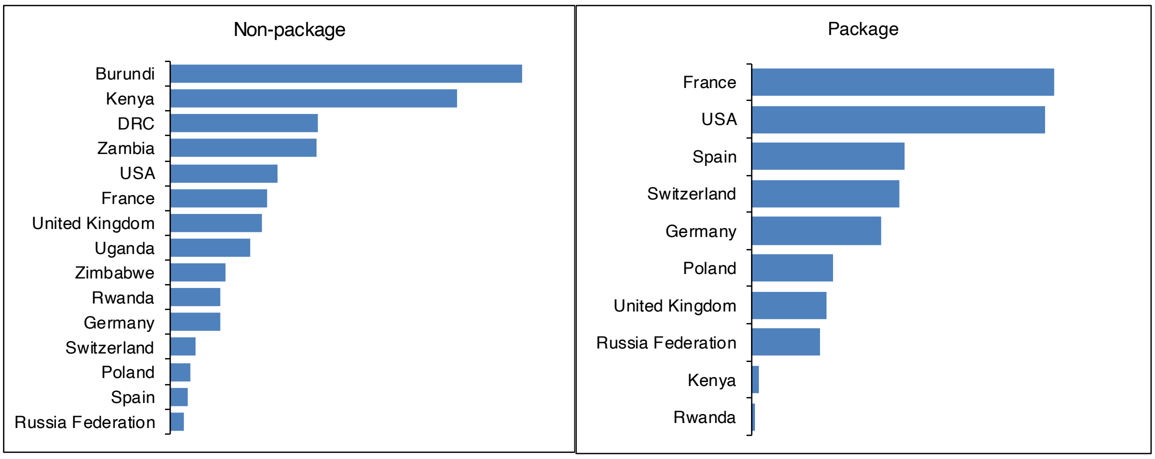
Percent



Most visitors who came under the non-package tour arrangement from Burundi, Kenya, DRC and Zambia settled their bills through cash. Similarly, visitors who came under the package tour arrangement from France, the United States of America, Spain, Switzerland and Germany also settled their bills in cash. Cash was used by both visitors from long-haul and neighboring countries (**Chart 2.22**).

Chart 2.22: Cash payment by tour arrangement for top 15 source markets, 2020

Percent



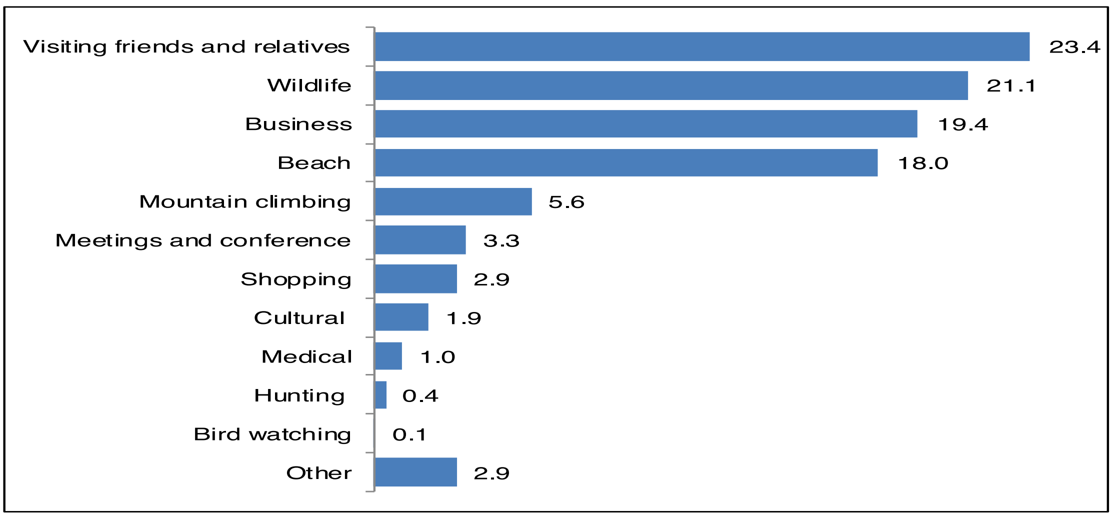
Note: There were no visitors under the package tour arrangement from Zambia, Uganda, DRC and Burundi

2.12 Main tourism activity

Visiting friends and relatives was the main activity in URT, accounting for 23.3 percent of the total visitors in 2020, compared with 14.9 percent in 2019 (**Chart 2.23**). For the first time since these surveys started, visiting friends and relatives took the lead and replaced wildlife. The prominence of visitors visiting friends and relatives is associated with travel restrictions for most of long-haul source markets, hence the majority of visitors were from neighboring countries.

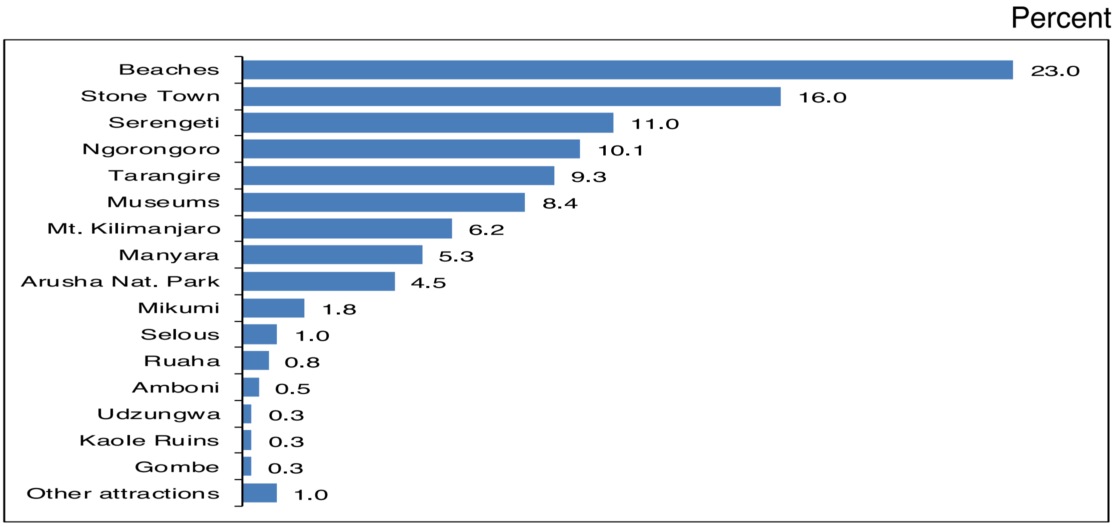
Chart 2.23: Main tourism activities in URT

Percent



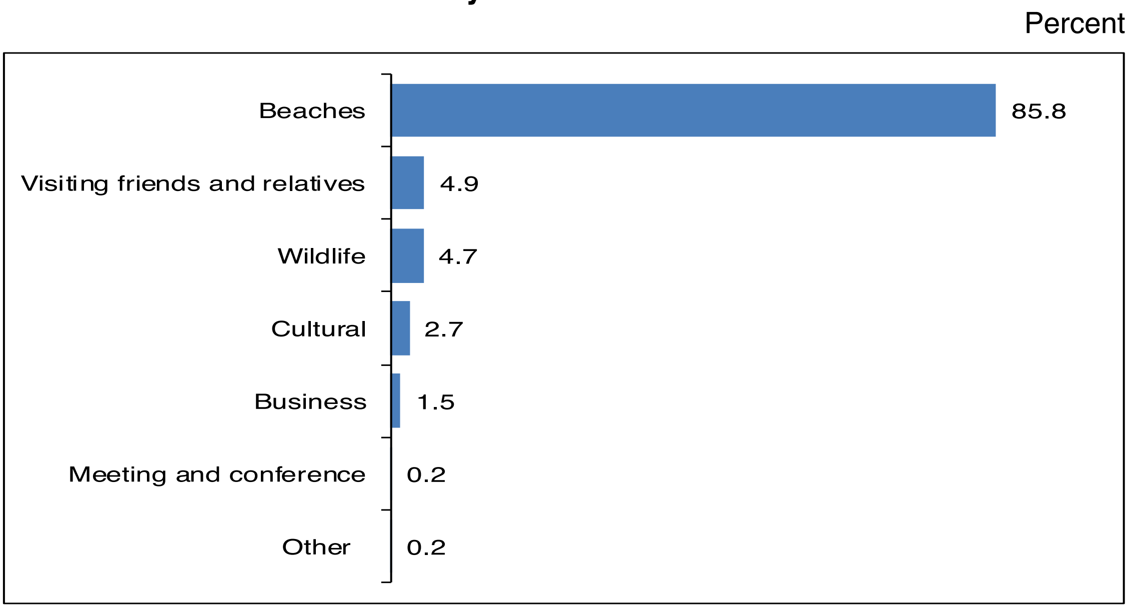
Beaches, Stone Town, Serengeti and Ngorongoro were the most visited tourist attractions in Tanzania, accounting for about 60 percent (**Chart 2.24**).

Chart 2.24: Most visited tourist attractions



In Zanzibar, the beach was the main tourism activity, attracting 85.8 percent, followed by visiting friends and relatives and wildlife (**Chart 2.25**).

Chart 2.25: Main tourism activity in zanzibar

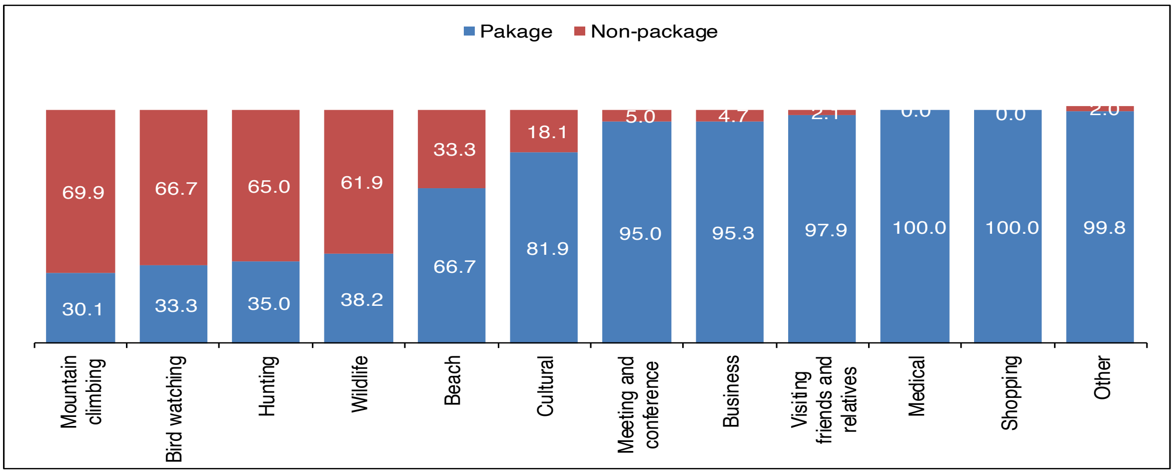


2.13 Tourism activity by travel arrangement

The findings show that visitors who came for mountain climbing, bird watching and wildlife were under the package tour arrangement, while those who came mainly for beach, cultural activities, visiting friends and relatives, meetings and conferences, and business were under the non-package tour arrangement (**Chart 2.26**).

Chart 2.26: Tourism activity by travel arrangement

Percent



2.14 Tourism activity by top 15 source markets

Visitors whose main activity was wildlife mostly came from Spain, Poland and Switzerland. Visitors from Kenya and Burundi mostly came for visiting friends and relatives, while visitors from Zambia, Zimbabwe and Uganda mainly came for business (**Table 2.19**).

Table 2.19: Tourism activities by top 15 source markets

Percent

Country of residence	Tourism activity									
	Wildlife	Beach	Visiting friends and relatives	Business	Cultural	Mountain climbing	Meetings and conference	Medical	Shopping	Hunting	Other
Burundi	1.2	0.9	50.0	15.3	0.0	0.0	0.5	1.6	0.2	0.0	30.3
Kenya	2.9	4.5	57.8	8.2	2.2	0.6	5.1	5.1	0.4	0.2	13.1
United States	40.7	6.8	12.9	6.1	3.6	17.2	2.3	0.4	0.0	4.0	5.9
France	36.9	43.7	4.4	2.0	2.9	7.5	1.5	0.0	0.2	0.0	0.9
United Kingdom	20.8	26.5	30.2	3.7	1.2	11.0	3.7	0.0	0.4	0.0	2.4
Zambia	0.0	0.0	23.8	58.6	0.0	0.0	0.0	0.4	7.5	0.0	9.7
Congo, DR	1.3	1.7	21.4	27.9	0.4	0.0	0.9	0.9	41.9	0.0	3.5
Switzerland	44.2	20.8	5.1	0.5	0.0	23.4	6.1	0.0	0.0	0.0	0.0
Germany	42.4	29.3	18.5	2.7	1.6	3.8	1.1	0.0	0.0	0.0	0.5
Poland	50.0	35.5	0.0	4.3	0.0	10.1	0.0	0.0	0.0	0.0	0.0
Spain	53.4	25.6	9.0	3.0	2.3	6.0	0.0	0.0	0.0	0.0	0.8
Uganda	0.9	5.4	17.0	40.2	0.0	0.0	4.5	0.0	0.9	0.0	31.3
Rwanda	3.5	7.0	23.3	30.2	1.2	0.0	7.0	0.0	1.2	0.0	26.7
Zimbabwe	1.1	9.2	9.2	49.4	4.6	0.0	0.0	0.0	21.8	0.0	4.6
Russia	42.0	45.5	8.0	0.0	3.4	1.1	0.0	0.0	0.0	0.0	0.0

2.15 Average expenditure

The overall average expenditure per person per night dropped by 42.9 percent to USD 152 in 2020 from USD 266 in 2019. Business visitors accounted for the highest average expenditure of USD 197 per person per night (**Table 2.20a**). With regard to travel arrangement, the average expenditure of visitors who came under the package tour arrangement was USD 312 and USD 115 under the non-package tour arrangement. In Zanzibar, the overall average expenditure was USD 192 in 2020 (**Table 2.20b**).

Table 2.20 (a): Average expenditure by purpose and travel arrangement, URT

Millions of USD

	Travel Arrangement		
Purpose of visit	Package	Non-package	Overall
Business	691	129	197
Medical treatment	329	36	73
Visiting friends and relatives	259	87	102
leisure and holidays	235	149	180
Other	225	94	101
Overall	312	115	152

Table 2.20 (b): Average expenditure by purpose and travel arrangement, Zanzibar

Millions of USD

	Travel Arrangement		
Purpose of visit	Package	Non-package	Overall
Business	348	301	310
Leisure and holidays	228	173	194
Visiting friends and relatives	176	139	142
Other	327	115	134
Overall	238	175	192

In terms of source markets, visitors from the United States of America had the highest average expenditure of USD 351.2 per person per night, followed by visitors from Russian Federation and France. With regard to tour arrangements, the United States was leading with average expenditure of USD 501.0 per person per night under the package tour, followed by Rwanda and France. Meanwhile, visitors with higher average expenditure under non-package tour arrangement were mainly from France, the United States of America and Zimbabwe (**Table 2.21**).

Table 2.21: Average expenditure - top 15 source markets by travel arrangement, URT

Percent

Country of residence	Travel arrangement (USD)		Overall
	Package	Non-package	
Burundi	0.0	73.0	73.0
Kenya	96.0	78.8	81.7
United States	501.0	164.0	351.2
France	366.5	173.2	228.4
United Kingdom	288.0	128.8	181.9
Zambia	0.0	81.1	81.1
Congo, DR	0.0	83.4	83.4
Switzerland	322.7	101.5	196.3
Germany	262.5	88.5	146.5
Poland	195.0	118.0	143.7
Spain	256.0	130.6	161.9
Uganda	0.0	79.6	79.6
Rwanda	383.0	58.0	123.0
Zimbabwe	0.0	160.1	160.1
Russian Federation	358.5	120.8	239.6

In Zanzibar, visitors from Czech Republic had the highest average expenditure of USD 403.2 per person per night, followed by Spain, the United States of America, Switzerland and France (**Table 2.22**).

Table 2.22: Average Expenditure - top 15 source markets by travel arrangement, Zanzibar

Country of residence	Travel arrangement (USD)		Overall
	Package	Non-package	
France	339.0	162.0	221.0
United States	266.0	203.0	228.2
Switzerland	306.0	138.4	222.2
Germany	229.0	122.3	149.0
Poland	175.0	124.6	149.8
United Kingdom	483.0	150.0	216.6
Spain	256.0	216.2	229.4
Russian Federation	186.0	121.8	143.2
Sudan	160.0	72.4	94.3
Czech Republic	676.0	130.4	403.2
Israel	206.0	102.4	136.9
Romania	60.0	110.5	93.7
Netherlands	0.0	132.4	132.4
Egypt	78.0	151.6	127.1
South Africa	213.0	131.8	152.1

2.16 Tourism earnings

Tourism earnings in the United Republic of Tanzania decreased by 70.4 percent to USD 714.5 million in 2020, from USD 2,604.46 million recorded in 2019. The decline is explained by a 59.3 percent drop of international arrivals to 620,867 from 1,527,230 in 2019 coupled with decline in the length of stay. Out of 714.5 million, USD 614.6 million was earned from tourists who came for leisure and holidays, which accounted for 82.9 percent of the total earnings, while the least earnings were from tourists who came for business purpose (**Table 2.21**). In terms of earnings by travel arrangement, the findings indicate that about 52.5 percent of total earnings were received from visitors who came under the non-package tour arrangement.

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

Millions of USD

	Travel Arrangement		
Purpose of visit	Package	Non-package	Earnings
Leisure and holidays	327.5	287.2	614.6
Business	3.3	10.2	13.5
Visiting friends and relatives	0.7	19.4	20.1
Other	7.7	58.7	66.3
Tourism Earnings	339.1	375.4	714.5

Tourism earnings in Zanzibar fell by 28.9 percent to USD 380.1 million in 2020 compared with USD 535.2 million earned in 2019, largely associated with decrease in number of visitors, average expenditure per person and length of stay amid COVID-19 pandemic. Tourist arrivals to Zanzibar in 2020 were 173,497 compared to 317,262 in 2019, a decline of 45.3 percent. A large share of earnings was received from visitors who came for leisure and holidays, which is USD 377.6 million, while earnings from business were the lowest (Table 2.22). Likewise, earnings from the tourists who came under the non-package tour arrangement accounted for about 61 percent of the total earnings for Zanzibar.

Table 2.24: Tourism earnings by travel arrangement and purpose of visit, Zanzibar

Millions of USD

	Travel Arrangement		
Purpose of visit	Package	Non-package	Earnings
leisure and holidays	148.6	229.0	377.6
Visiting friends and relatives	0.1	0.7	0.8
Business	0.1	0.6	0.7
Other	0.3	0.7	1.0
Tourism Earnings	149.1	231.0	380.1

2.17 Impact of COVID-19 on tourism and hospitality industry

The outbreak of Coronavirus disease (COVID-19) began in China in December 2019 and spread across many countries. The markets that were hit hard include Spain, Italy, France, the United Kingdom, the United States of America, Australia and China. Economies undertook different measures to combat the spread of the disease. The measures include lockdowns, social distancing and international travel restrictions. Such measures have disrupted the global economy in many ways including: supply and demand chain, foreign financing flows from remittances, tourism, foreign direct investment and foreign aid.

In Tanzania, the tourism and hospitality industry is one of the major sources of foreign exchange earnings and employment. In 2019, the country earned USD 2,604.5 million, equivalent to 60.8 percent of service exports. In the case of Zanzibar, the sector accounts for about a third of its GDP, 80 percent of its revenue, and remains the biggest employer. Thus, COVID- 19 has substantially derailed the growth and progress of the key contributor to the national economy.

A profound impact has been observed in the hospitality industry (hotel and accommodation, tour operators and travel agents) following the lockdowns, travel bans and concerns about travelling. During April - May 2020 - the time when the pandemic was at its peak in Tanzania, all international flights were cancelled except the Ethiopian airline. However, starting June-July 2020, some airlines resumed flights slowly. In Zanzibar, about 95 percent of tourist hotels closed operations while others operated below capacity between March and June 2020. During 2020, the number of international visitors declined by 59.3 percent to 620,867 from 1,527,230 recorded in 2019.

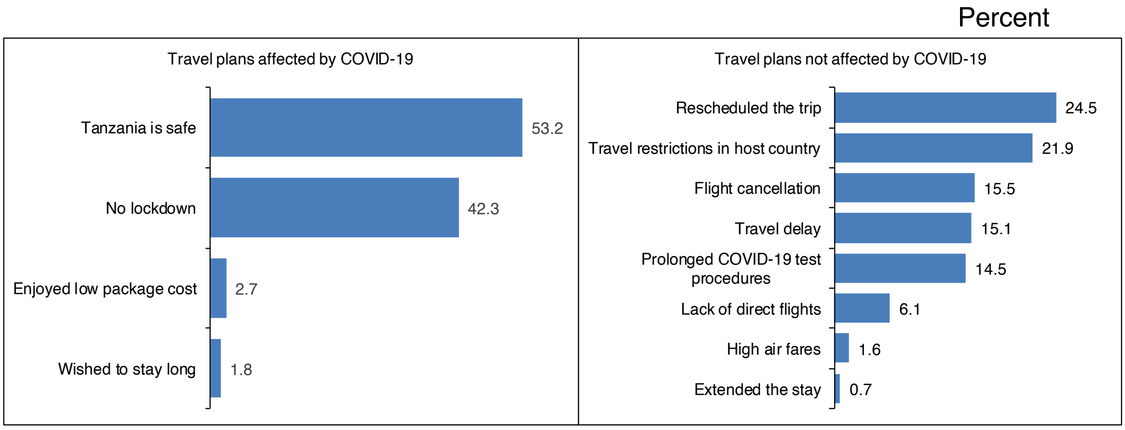
Among the first measures taken by most countries was to restrict movement of people from COVID-19 infected countries as a measure to control the spread of the virus and cancelling of most of the international flights to many destinations. Consequently, Tanzania also restricted arrivals from the affected countries, including Italy and China, both of which are among the country's major sources of tourists.

Recovery from the pandemic has gradually started in the second half of 2020, with most countries easing their lockdowns and an observed resumption of international flights. The recovery is not fully optimal, but signs are positive with the number of international arrivals increasing from November 2020 and a slight change of pattern observed in the source markets particularly for Zanzibar. The island received a big number of visitors from Russia, Czech Republic, unlike in the past when most of the tourists came from Italy, Spain, the United States of America and United Kingdom.

2.18 Effect of COVID-19 on travel plan

About 74 percent of the interviewed visitors indicated that their travel plans to Tanzania were not affected by COVID-19 pandemic, though have been mindful of health procedures during their travel. Visitors (about 96 percent) whose travel plans were not affected by the pandemic, gave the reason that destination Tanzania was deemed safe due to the standard operating procedures in place and the fact that the borders remained opened for visitors from almost all over the world. On the other hand, 22.6 percent of visitors revealed that their plans were affected by the pandemic, while 3.5 percent had no comments. Most of the visitors whose plans were affected by the pandemic, revealed it was due to rescheduled flights, travel restrictions in the source markets, flight cancellations, travel delays and prolonged COVID-19 test procedures (**Chart 2.27**).

Chart 2.27: Effect of COVID-19 on travel plan



2.19 Outlook

Global tourism experienced its worst year on record in 2020, with international arrivals dropping by about 73 percent to 1,060 million in 2020 from 1,461 million 2019 according to the World Tourism Organization (UNWTO). The decline is significantly higher than the four percent drop recorded during the 2009 global economic crisis and 0.4 percent registered during SARS in 2003. Destinations worldwide recorded 1 billion fewer international arrivals in 2020 than in the previous year and USD 1.3 trillion loss in tourism exports, reflecting an unprecedented fall in demand and widespread travel restrictions. A majority of tourism experts do not expect to return to pre-pandemic levels before 2023. The driving factors include travel restrictions, slow virus containment, economic environment and lack of coordinated response among countries.

Based on current trends, UNWTO has outlined two scenarios for 2021; both consider a possible rebound in international travel in the second half of the year. The outlook hinges on several factors – lifting of travel restrictions, the success of vaccination programs or the introduction of harmonized protocols such as the Digital Green Certificate planned by the European Commission. The first scenario projects a rebound in July 2021, with an increase of 66 percent of international arrivals for 2021 compared to low number of international arrivals of 2020, and 55 percent lower than arrivals recorded in 2019. The second scenario reflects a potential rebound in

September 2021, leading to a 22 percent increase in arrivals compared to 2020 and 67 percent below the levels of 2019.

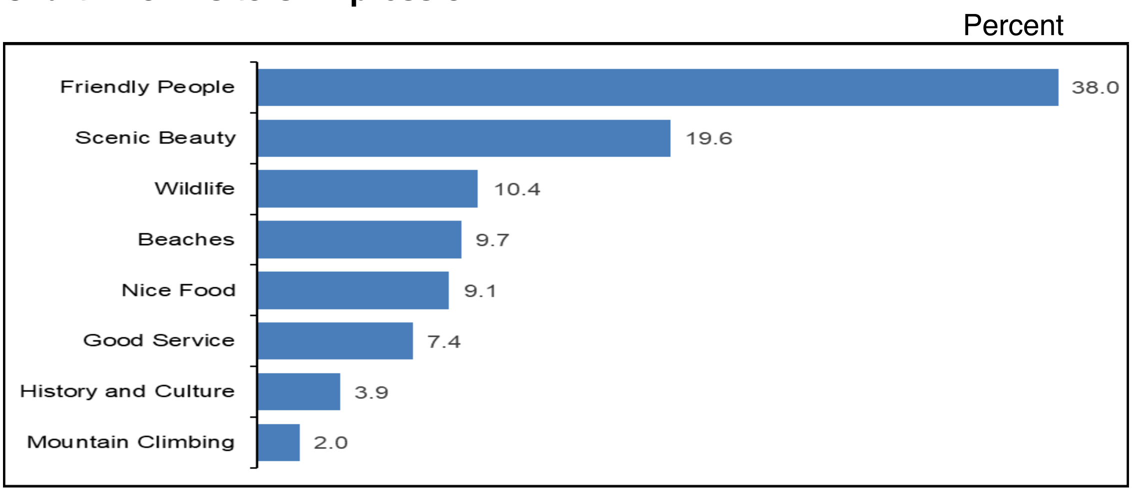
Tanzania like many other countries has also experienced a significant decline in the number of arrivals by 59.3 percent following containment measures taken by many economies, which resulted in lockdowns and slowdown of economic activities including travel restrictions. Notwithstanding, prospects for 2021 are on the higher side compared to 2020, though still lower than the pre-pandemic levels. However, further rebound is projected in the medium term.

2.20 Visitors' impression and areas of improvement

2.20a Visitors' impression

Tanzania has the friendliest people in the world, who make visitors' holidays a special and memorable event. About 58.0 percent of the interviewed visitors revealed that they had an excellent experience (scenic beauty) with friendly and welcoming people. Other things that impressed visitors were wildlife, beaches and delicious food (**Chart 2.28**).

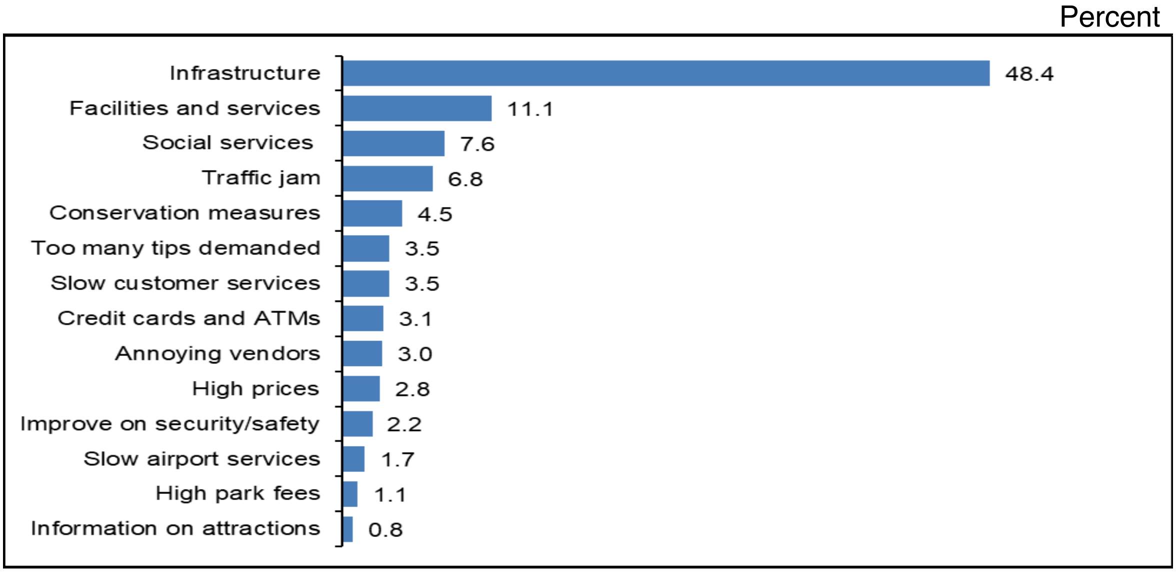
Chart 2.28: Visitors' Impression



2.20b Main areas of improvement

The visitors maintained that the infrastructure has remained a major area of concern that needs improvement. The visitors were concerned with the state of the roads leading to and within the national parks. Other major areas of concern were state of public facilities at consumption points, social services and traffic jams. However, upgrading the roads within the tourist attraction sites needs to be done in a manner that does not compromise ecology of the concerned areas with a view to uphold its neutrality as much as possible. The government has been addressing these issues through various initiatives including improvement of feeder roads and construction of flyovers, construction of new airport terminals and improved services delivery (**Chart 2.29**).

Chart 2.29: Areas for improvement



Chapter 3: Conclusion and Recommendations

3.1 Conclusion

The 2020 international visitors' exit survey was conducted at JNIA, AAKIA, KIA, Namanga, Tunduma, Horohoro, Mtukula and Manyovu tourists exit points. The main objective of conducting annual surveys is to obtain data for planning and tourism promotion, compilation of Balance of Payments and National Account Statistics.

The findings indicate a decline of international tourism earnings from USD 2,604.5 million in 2019 to USD 714.6 million in 2020. In the case of Zanzibar, tourism earnings fell by 28.9 percent to USD 380.1 million in 2020, compared with USD 535.2 million earned in 2019. The decline in earnings is explained by decrease in the number of tourists following the outbreak of COVID-19 pandemic, which led to the restriction of international travels to contain its spread. The number of international visitors declined by 59.3 percent to 620,867 from 1,527,230 recorded in 2019, while in Zanzibar the number of tourist arrivals decreased by 45.3 percent to 173,497 compared to 317,262 in 2019. Tourism source markets that were hit hard include Spain, Italy, France, the United Kingdom, United States of America, Australia and China. The overall average expenditure per person per night declined to USD 152 compared to USD 266 in 2019 in URT, while in Zanzibar the overall average expenditure was USD 192. Furthermore, visitors in the URT stayed for an average of 10 nights in 2020.

Economies undertook several measures to combat the spread of the disease including lock downs, social distancing, and international travel restrictions. Such measures have disrupted the global economy in many ways including the underperformance of the tourism sector. In Tanzania, all international flights were cancelled except the Ethiopian airline, tourist hotels temporarily closed their operations and many employees were laid off during the pandemic.

3.2 Recommendations

Given the fact that tourism and hospitality industry in Tanzania is severely hit by the COVID-19 pandemic, whereby the main source markets of the destinations are still implementing travel restrictions, various participatory strategies should be put in place. Strategies regarding COVID-19 precaution measures, tourism marketing and product development are essential for recovery and development of the tourism sector. The strategies should focus on increasing the number of tourists from different parts of the world and their length of stay at destination Tanzania. The key policy issues and recommendations for improving the growth of the sector are summarized in **Matrix 1**.

Matrix 1: Summary of Major Policy Issues and Actions

S/n	Key issue	Description	Required intervention	Specification	Responsible Ministry/ Authority
1	The disaster of COVID-19 pandemic in the tourism sector	The number of visitors in 2020 dropped by 60 percent to 620,867 from 1,527,230, recorded in 2019 as a result of COVID-19 pandemic.	1. Strengthen COVID-19 precaution measures	Testing visitors, implementation of standard operating procedures (SOP) and adhere to other guidelines and measures of the virus provided by the United Nations Health Organization to control the spread.	MNRT
			2. Strengthen development of domestic tourism	Create public awareness on the importance of visiting various tourism attractions, Strengthen Tanzania Safari channel' Increase affordable prices in protected areas accommodation facilities,	MNRT, TCT
			3. Diversify tourism products	Further develop and diversify tourism products including development of beaches in Mainland, waterfront project, cruise ship tourism, cultural and historical and Meeting Incentives Conference and Events (MICE). This could go hand in hand with the Government improving/upgrading infrastructures heading to such investments	MOFP, MNRT, LGAs in Zanzibar, TIC, ZCT, ZATI.

S/n	Key issue	Description	Required intervention	Specification	Responsible Ministry/ Authority
2	Promotion of tourism products	Majority of visitors received information about Tanzania through word of mouth, travel agents and tour operators.	Strengthen the use of ICT and social media in promotion of tourism products	Establishment of e-marketing strategy and set aside more resources for tourism promotion in non-traditional markets, especially in Eastern Europe, Russia, Asia and other regions. Develop platforms like mobile platform, digital platform and web browsers,	MNRT, LGAs, ZCT, TCT, TTB, and ZATI
3.	Infrastructure challenge in some National Parks.	Road in some National Parks do not have regular maintenance.	Regular maintenance	Regular maintenance of roads in some National Parks	TANAPA and NCAA

Appendices

Appendix A: Survey methodology

I. Introduction

This section describes the methodology used in undertaking the 2020 International Visitors' Exit Survey. It mainly covers scope and coverage of the survey; sample design; survey instruments; training; data collection and processing; and expenditure estimation procedures.

II. Scope of the Survey

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

III. Sample Size

The sample covered 3,174 respondents. However, when considering travel party together with the interviews, the total number of visitors covered was 4,859. This sample was considered sufficient to meet the survey's objectives.

IV. Data Collection and coverage

Data collection was undertaken for a two-week period, from 28th September to 11th October 2020, during the tourist peak season, which normally runs from July to September. A team of 30 enumerators participated in data collection exercise at selected eight departure border points namely, Julius Nyerere International Airport, Kilimanjaro International Airport, Abeid Amani Karume International Airport, Horohoro, Namanga, Tunduma, Mtukula and Manyovu borders. The fieldwork was coordinated by the Technical Committee staff whose main task was to monitor data quality including the questionnaires' completeness.

V. Enumerators' Manual

The enumerators' manual was prepared and used as a reference document during the survey. The manual contained information, guidelines and definitions of the key concepts used in the questionnaire. In addition, the manual provided the description of the procedure for data crosschecking.

VI. Training of Enumerators

The fieldwork was preceded by a one-day training on the understanding of the survey tools and their obligation for the need to ensure quality work and addressing the challenges that came up from the previous surveys. The enumerators were also trained on methods of onsite data editing, quality control procedures and fieldwork coordination.

VII. The Questionnaire

The questionnaire used was similar to the one used in the previous surveys with a few questions added to capture additional information for promotional strategy and policy review to improve service delivery. The questionnaire had 27 questions, comprising four main parts, namely: visitor profiles, travel behaviour, expenditure patterns and visitor's comments (Appendix III).

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

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

Questions 19 to 22 were structured to estimate tourism expenditure. The questions probed for details on the amount spent as well as mode of payment used to transact.

Question 23 and 24 seek information on whether the visitor is likely to come back to Tanzania and if it is the first trip to Tanzania.

Question 25 and 26 are about visitors' impression and the areas that need improvement with a view to make Tanzania a better tourist destination.

Question 27 sought information on whether corona virus pandemic affected travel plan for the visitors to Tanzania.

VIII. Data Processing

Data processing was preceded by questionnaire coding and cleaning, data entry and verification. ORACLE 11 database, a web-based application was used for final consistency checks and identification of outliers.

IX. 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 visitor by travel arrangement and average length of the stay.

The model is depicted in the following equation:

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

Whereby:

E_V = Total tourist expenditure in Tanzania

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

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

V_P = Number of arrivals under 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 Dept)	Visitors by travel arrangement		Avg. length of stay	Avg. expenditure per visitor per night		Total expenditure
						Package	Non Package	
			Package (V_P)	Non-package (V_{NP})	(T)	(E_P)	(E_{NP})	(E_V)
	Business							
	Holiday							
	VFR							
	Other							

Procedure and assumptions used for the estimation of tourist expenditure for 2020:

- 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 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 tour arrangements using the travel arrangement ratios as established in the survey.

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

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

Appendix B: Questionnaire

INTERNATIONAL VISITORS' EXIT SURVEY

Please read the instructions carefully before filling the form.

INTRODUCTION

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

Your Cooperation is highly appreciated

***FOR OFFICIAL USE ONLY*:**

*CODE NUMBER:*____

*NAME OF THE RESEARCHER:*______________________________________

*DATE:*____________________ *SIGNATURE:*_________________________

*NAME OF THE DATA ENTRANT:*_____________________________________

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

2. Age Group? (tick one only)

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

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

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

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

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

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

6. Gender

Number of females	
Number of males	

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

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

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

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

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

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

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

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

11. Did you travel in package tour or independently?

(*If you travelled independently, go to question 16*)

Package	Independently

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

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

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

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

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

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

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

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

19. How much money did you spend in Tanzania during this trip including cash, traveller's cheque, charge cards?

(*please give your best estimate in case you do not remember the exact figures*)

Currency …

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

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

Donations		
Shopping		
Others (please specify): ……………………………..		

21. Is the above breakdown for the whole party? (Tick) Yes [ ] No [ ]

22. Which modes of payment did you use mostly in Tanzania? (Tick one only)

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

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

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

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

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

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

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

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

……………………………………………………………………………………………

……………………………………………………………………………………………

Appendix C: International visitors' arrival by country of residence

Country	Visitors	Percent
Burundi	580	11.94
Kenya	490	10.08
United States	472	9.71
France	455	9.36
United Kingdom	245	5.04
DRC	229	4.71
Zambia	227	4.67
Switzerland	197	4.05
Germany	184	3.79
Poland	138	2.84
Spain	133	2.74
Uganda	112	2.31
Russian Federation	88	1.81
Zimbabwe	87	1.79
Rwanda	86	1.77
Czech Republic	77	1.58
Israel	75	1.54
Sudan	72	1.48
South Africa	53	1.09
Netherlands	53	1.09
Canada	51	1.05
Egypt	49	1.01
United Arab Emirates	41	0.84
Romania	40	0.82
Italy	40	0.82
India	40	0.82
Comoros	37	0.76
Malawi	36	0.74
Sweden	31	0.64
Philippines	30	0.62
Ukraine	24	0.49
Oman	24	0.49
Turkey	23	0.47
Austria	23	0.47

Country	Visitors	Percent
Denmark	22	0.45
Australia	21	0.43
China	20	0.41
Belgium	19	0.39
Brazil	16	0.33
Serbia	16	0.33
Portugal	14	0.29
Indonesia	12	0.25
Ireland	11	0.23
Nigeria	10	0.21
Mozambique	10	0.21
Pakistan	10	0.21
Korea	9	0.19
Ghana	9	0.19
Bulgaria	9	0.19
Mexico	7	0.14
Finland	7	0.14
Tajikistan	4	0.08
Morocco	4	0.08
Burkina Faso	4	0.08
Greece	4	0.08
Croatia	4	0.08
Japan	4	0.08
Vietnam	3	0.06
Norway	3	0.06
Namibia	3	0.06
Cameroon	3	0.06
Slovakia	3	0.06
Ethiopia	3	0.06
Slovenia	3	0.06
Qatar	2	0.04
Thailand	2	0.04
Armenia	2	0.04
South Sudan	2	0.04
New Zealand	2	0.04
Tunisia	2	0.04

Country	Visitors	Percent
Benin	2	0.04
Kuwait	2	0.04
Cyprus	2	0.04
Lebanon	2	0.04
Central African Republic	2	0.04
Togo	2	0.04
Lesotho	2	0.04
Swaziland	2	0.04
Jordan	2	0.04
Bosnia and Herzegovina	2	0.04
Djibouti	2	0.04
Mauritania	2	0.04
Malta	2	0.04
Gabon	2	0.04
Senegal	2	0.04
Somalia	1	0.02
Sierra Leone	1	0.02
Malaysia	1	0.02
Chad	1	0.02
Syria	1	0.02
Angola	1	0.02
Yemen	1	0.02
Mauritius	1	0.02
Total interviewees	4,859	100.00

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