# TANZANIA TOURISM SECTOR SURVEY

## The 2005 International Visitors' Exit Survey Report

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Ministry of Natural Resources and Tourism (MNRT)
www.mnrt.org

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

Zanzibar Commission for Tourism
www.zanzibartourism.net

National Bureau of Statistics
www.nbs.go.tz

Immigration Department
www.tanzania.go.tz/immigration.html

*Front cover: Snow-caped Mt. Kilimanjaro*
*Back cover: Zanzibar stone town*

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# FOREWORD

Tourism is one of the key sectors that have contributed substantially to the economic growth of Tanzania. In the period 2001 to 2005, its contribution to total exports of goods and services increased from US $ 615 million to US $ 824 million. This has been largely driven by the fact that Tanzania has all it takes to be an attractive tourist destination. It is the home to the snow-capped Mount Kilimanjaro, the tallest mountain in Africa, the Serengeti National Park, the Ngorongoro Crater and the Selous Game Reserve, together forming the world's largest wildlife sanctuaries. Tanzania also boasts of cultural heritage sites notably the Ruins of Kilwa Kisiwani and Songomnara, the Kondoa Rock Art Sites, the Historical Town of Bagamoyo, and the Stone Town and the shimmering beaches of the spice Islands of Zanzibar. The growth in the tourism industry is also attributable to the improvement in the infrastructure and increase in investment, particularly in hotels.

The multi-institutional committee comprising the Ministry of Natural Resources and Tourism (MNRT), Bank of Tanzania (BOT), National Bureau of Statistics (NBS), Immigration Department and the Zanzibar Commission for Tourism (ZCT) continued to monitor developments in the Tourism industry. We are therefore glad to introduce the 2005 Tanzania Tourism Sector Survey (TTSS) Report produced by these institutions. The report is the third in the series, after the 2004 and the maiden one that was conducted in 2001.

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

The three surveys have depicted improved performance in the tourism industry, ascertained by a significant increase in earnings from international visitors. Just like in the previous surveys, the 2005 survey reveals that the visitors were impressed by the welcoming and friendliness of Tanzanians and the beauty of the country. Nevertheless, they raised concern on quality of services, suggesting the need for improvement. The report further poses a challenge to stakeholders to make concerted efforts in order to fully utilize the potential of the tourism sector. The results also showed the dominance of Europe and North America as Tanzania's main "traditional" tourism markets.

It is expected that this report will be a useful source of information to policy makers, investors, academicians and other stakeholders.

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# ACKNOWLEDGEMENT

The Tanzania Tourism Sector Survey (TTSS) Steering committee wishes to convey heartfelt thanks and appreciation to all those who in one way or another contributed to the successful completion of the 2005 International Visitors' Exit Survey. Special thanks should go to the main sponsors; the Bank of Tanzania (BOT) and the Ministry of Natural resources and Tourism (MNRT). We would also like to thank the head of other participating institutions; namely the National Bureau of Statistics (NBS), the Immigration Department and the Zanzibar Commission for Tourism for their valuable support, guidance and for availing their staff to participate in the survey.

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

The 2005 Tanzania Tourism sector Survey Report was prepared under overall supervision of S. A. Pamba (the then Director of Tourism - MNRT) and I. H. Kilato (Director of Economic Policy- BOT). The Technical Team was headed by G. Mwakibolwa (Deputy Director International Economics Department-BOT); other members of the Technical Committee included: I. A. Mussa (MNRT), D. Minzi (BOT), V. Kejo (BOT), V. Tesha (NBS), T. Mwisomba (NBS), E. Mwamwaja (MNRT), R. Lyatuu (Immigration Department) and M. Jaffer (ZCT), whereas F. Shayo (BOT) managed the data processing.

# EXECUTIVE SUMMARY

## RATIONALE

The Tourism industry continues to be one of the key foreign exchange earners in the country, resulting from the joint efforts by the Government and the private sector in promoting the industry and marketing the country as the quality nature destination. However, in order to sustain its development, availability of reliable information is necessary. In view of this, five participating institutions namely, the Bank of Tanzania (BOT), the National Bureau of Statistics (NBS), the Ministry of Natural Resources and Tourism (MNRT), Immigration Department and Zanzibar Commission for Tourism (ZCT) have been carrying out the International Visitors' Exit Surveys since 2001. One of the recommendations made in the 2001 survey report was to carry out shorter surveys on annual basis in order to obtain up-to-date price information. The 2005 survey was carried out in the months of August and September 2005 at four major exit points, the Julius Nyerere International Airport (JNIA), Kilimanjaro International Airport (KIA), Namanga (NAM) and Zanzibar Airport (ZAA).

## OBJECTIVES OF THE SURVEY

The survey had two key objectives;

- Updating information on prices used for estimating tourist expenditure in the country; and
- Gathering information useful in promoting tourism and improve macro-economic policy.

## MAIN FINDINGS OF THE SURVEY

In the 2005 survey, a total of 2,772 respondents were interviewed representing 6,138 visitors. The Survey results were used in the tourist expenditure model to estimate receipts for 2005. Important components of the model include length of stay, number of arrivals and average expenditure per person per night.

**AVERAGE EXPENDITURE**

The average expenditure per night for the Package Visitors was US$ 155.3 and US$ 125.5 for Non-Package Visitors. Expenditure was further computed for each sub-sector giving an indication that accommodation accounted for 29 percent, Transport 28 percent, retailing 12 percent while other payments accounted for 31 percent of the total expenditure.

**LENGTH OF STAY**

The survey results indicate that the average length of stay in Tanzania remained constant at around 12 nights in the United Republic of Tanzania, as in 2004. This is an increase of one night from an average of 11 nights in 2001.

**EARNINGS**

Using the expenditure model with updated price information namely the average expenditure per person per night obtained during the survey, the model estimates that Tanzania received US$ 823,589,393 from tourism activities in 2005, out of which Zanzibar ‘s estimated earnings were US$ 111,358,688.35.

**MAJOR SOURCE MARKETS OF TOURISTS IN TANZANIA**

The top ten markets for 2005 were as follows:
United Kingdom, United States of America, Italy, Germany, Spain France , South Africa, Netherlands, Australia and Canada.

**MAJORITY VISITORS ARE OF ‘18–35’ AGE GROUP**

Just like in the past surveys, visitors in the age group of ‘18–35’ remain dominant. In this survey the group accounted for 49.2% of all visitors, where Japan, Australia and the United States of America continue to keep the record of having the largest number of senior citizen (55+) visitors.

**MAJORITY OF VISITORS WERE ON PACKAGE ARRANGEMENT**

Visitors who travelled on 'package' arrangement continued to outstrip 'non-package' visitors accounting for 69%, whereas 'non-package' visitors accounted for 31 percent. Package tourist increased from 65 percent in 2004 to 69 percent.

**VISITORS TO TANZANIA PRIMARILY CAME FOR 'LEISURE AND HOLIDAY' PURPOSES**

About 89 percent of visitors came for leisure and holiday, 4.9 percent were Visting Friends and Relatives (VFR), while 3.8 percent came as Business tourists. The percentages are fairly consistent since the 2001 survey.

**MOST VISITORS WERE IMPRESSED BY TANZANIA AS ONE OF THE UNIQUE TOURIST DESTINATIONS**

In general, visitors were satisfied with the quality of tourism products in the country. However, it has been noted that improvement in services offered to visitors would greatly increase Tanzania's product value.

**RECOMMENDATIONS**

- The three consecutive surveys have established the dominance of Western Europe and North America blocks as traditional Tanzanian source markets. In this regard, TTB in collaboration with the private sector should work tirelessly to maintain current markets while at the same time diversify to new markets such as China, India, South Korea and other countries in Eastern Asia.
  *Responsible Institutions: Tanzania Tourist Board, Tourism Confederation of Tanzania and Zanzibar Commission for Tourism*

- In all the three surveys, it has been established that visitors belonging to the age group 18 to 55 years account for more than three-quarters of all visitors. In this regard, the tour organizers

while improving facilities for the 'under 55 age group', they should also spearhead suitable programmes targeting senior citizens (55+).
*Responsible Institutions: Tourism Confederation of Tanzania(TCT), Zanzibar Association of Tourism Investors (ZATI)*

- The survey results continue to depict small proportion (about 4 percent) of visitors who came for business purposes. In view of this, the government through the Tanzania Investment Centre (TIC) should continue with efforts to attract more investments pertaining to Meetings, Incentives, Conferences and Exhibitions (MICE).
  *Responsible Institutions: Tourism Confederation of Tanzania, Tanzania Tourist Board, Tanzania Investment Centre and Ministry of Foreign Affairs and International Cooperation.*

- Since most tourists who visit the Northern circuit enter Tanzania through Namanga, it is recommended that the usage of KIA should be promoted by encouraging additional international airlines. Currently, KLM is the only scheduled airline that flies to KIA directly from Europe, with Ethiopian airline and Air Condor flying three times a week. Furthermore, in order to encourage visitors coming directly to destination Tanzania, the renaissance of the National carrier is vital.
  *Responsible Institutions: Tanzania Airport Authority, Ministry of Infrastructure Development and Tanzania Civil Aviation Authority.*

- In order to prolong the length of stay and increase earnings at destination, it is recommended that there should be concerted efforts to diversify tourist products such as eco-tourism, cultural, conference and meeting tourism and market them.

- In order to improve quality of services, TANAPA and

Municipalities are urged to increase more amenities such as washrooms in the parks, campsites and along highways. Also, Municipalities need to substantially increase the number of public toilets in their respective localities in order to promote urban tourism.

- For Eliminating Poverty an integrative tourism programme should be developed in order to strengthen mutual linkages between local communities and tourism establishments. Host communities should be assisted to take up opportunities created by tourism investments. For example, provision of local supplies needed by the establishments including fresh agricultural produce.

- To improve efficiency in the generation and dissemination of tourism statistics, sections that deal with statistics in both the Immigration Department and the Ministry of Natural Resources and Tourism should be strengthened financially and be allocated with more qualified personnel. In addition, the Government should hasten the program of connecting electronically all immigration points, such that in future data entry is done at entry points.
  *Responsible Institutions: The Ministry of Natural Resources and Tourism and Immigration Department*

- In order to enhance efficiency and improve services at Airports, Airport Authorities, Immigration Department and Customs are urged to take appropriate and timely measures to reduce the time taken for entry/departure clearance formalities and improve facilities.
  *Responsible Institutions: Tanzania Airport Authority, Immigration and Customs*

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I

# RECENT DEVELOPMENTS ON TOURISM INDUSTRY

## 1.0 GLOBAL PERSPECTIVE

Tourism is currently recognized as one of the fastest growing industries in the world. According to the 2005 United Nations-World Tourism Organization (UNWTO) report, the number of international travellers' worldwide has grown from 689 million in 2000 to over 764 million in 2004. During the same period, international tourism receipts have grown from US$ 484 billion to over US$ 633 billion, an average annual growth of six percent. The developed countries take the lead in the share of tourism trade with countries such as France, Spain, UK and USA as world leaders in Tourism.

Tourism as an economic activity has gained importance to both the industrialised and less developed countries. This is mainly attributed to its characteristics; the sector is broadly characterized by having multiple linkages to different economic sectors. Also, the sector is relatively more labour-intensive and built on resources (nature and culture) that developing countries have comparative advantage of (DFID, 1999). Globally, Least Developing Countries (LDC's) have benefited marginally from this vital industry compared to the developed countries, yet tourism is still a principal foreign exchange earner for 83 percent of developing countries (Pro-Poor Tourism Partnership-2004). This implies that, tourism is an important sector for developing countries.

The world economic developments suggest that the future of the industry is promising. Generally, Personal Disposable Incomes

(PDI) in European countries, East Asian countries and America (Mintel-2004) have been increasing. The increased wealth coupled with the growing tendency for people in Europe and North America to retire younger but healthy, postulate increase of visitors from these aging populations. Furthermore, emerging technologies on transportation and information predict a brighter future for the industry as it increases efficiency and reduce costs of travelling. However, it is debated that even with this magnificent development of the tourism industry worldwide, its impact towards poverty reduction is dismal. It is argued that, the rich benefit more from the industry while developing countries are subjected to negative impact of the industry particularly environmental degradation and cultural interference. Moreover, there is vertical integration whereby big multinational companies control the business from the source market to destinations without caring for the benefits accruing to local economies at destinations. In this regard, the UNWTO (2002) advocates that tourism benefits should target the poor segments of the community by promoting activities that touch them. It is observed that, tourism success and sustainability will solely depend on partnerships that will ably facilitate local communities' participation. In view of this, stakeholders are strongly urged to have a "long-term view that is focused on establishing a mode of tourism development that is sustainable and maximizes mutual benefits particularly for the most disadvantaged communities" (UNWTO, 2006:4).

## 1.1 DOMESTIC PERSPECTIVE

In case of Tanzania, impressive performance has been recorded in the tourism industry during the last five years. The number of international visitors has increased from 501,669 recorded in 2000 to 612,754 recorded in 2005. Likewise, receipts accruing from international visitors have increased significantly from US$ 376.1 million to US$ 823.6 Million. The recorded improvement has triggered a significant increase in tourism investments in the country. The increase in investments has ranged from construction of new hotels to refurbishment of the old ones. In Zanzibar, two new Five-Star hotels namely La Gemma De'llest and Zamani Resort (Kempinski) became operational in 2005. During the same period, there was renovation and upgrading of the Kilimanjaro Kempinski Hotel in Dar es Salaam. Likewise, there has been impressive expansion of tourism activities as reflected by the increase in number of tour companies and improvement in services offered. The Tanzania Investment Report (2004) points out that tourism sector ranked third in attracting Foreign Direct Investment, after mining and manufacturing. This is partly attributed to the review of the investment policy in 1997.

In line with these developments, the giant international airlines namely Royal Dutch Line (KLM) and British Airways have increased the number of flights to Tanzania, and so are the quality of facilities and capacity of their carriers. Moreover, Tanzania has been striving to protect and diversify tourism for example, through encouraging beach tourism in Zanzibar. In this regard, regulations have been formulated by the Zanzibar Commission for Tourism to protect the beaches. In addition, the Ministry of Natural Resources and Tourism, Zanzibar Commission for Tourism and other stakeholders have been promoting the development of Ecotourism and Cultural Tourism. Other developments include the rehabilitation of roads leading to various tourist attractions like Mikumi, Ngorongoro and Bagamoyo.

In spite of these achievements, Tanzanian tourism industry is still faced with a number of challenges. Amongst the major challenges, is the fast deteriorating performance of Air Tanzania – the National Carrier. The development of a strong National Carrier would obviously contribute to bringing in more tourists directly from source markets to Tanzania, unlike the current trend where majority of them pass first through neighbouring countries before coming to Tanzania. This results into less spending and thus lower earnings to Tanzania. For example in Kenya, with Kenya Airways flying to different parts of the world it has the ability to collect visitors directly from the source markets. In addition, it is still a challenge on how to make the industry pro-people while maintaining sustainability particularly in the aspect of environmental conservation and diversification. To a large extent, in Tanzania Mainland, tourism is synonymous to wildlife and national parks while in Zanzibar; it is mainly beaches and historical sites. In the Mainland, in a typical seven-day package tour, a visitor spends most of the time in the national parks that are concentrated in the northern part of the country. This raises a concern of congestion of national parks in the northern circuit.

In Zanzibar, it is claimed that the inadequacy of tourists' activities limits the length of stay at destination. Mostly, tourists spent their time along beaches and touring historical Stone Town. In both Tanzania Mainland and Zanzibar, it is argued that there is minimal contact between tourists and local communities. In the light of this, there is therefore imperative need for Tanzania to diversify its forms of tourism products. In addition, there is also a dire need to increase efforts to market programs that directly touch peoples' daily lives like ecotourism and cultural tourism.

It is hoped that this overview coupled with the information in the rest of the chapters will be useful to Tanzania's tourism stakeholders both in the public and private sectors.

II

# SURVEY BACKGROUND AND METHODOLOGY

## 2.1 BACKGROUND

The 2005 International Visitors' Exit Survey was the third in series, after the first comprehensive survey which was conducted in 2001 and a follow up shorter survey in 2004. The following are the primary objectives of the survey:

- To provide an up-to-date price information for estimating tourist expenditure in Tanzania in order to improve compilation of National Accounts and Balance of Payments (BOP) Statistics; and
- To collect information for tourism promotion and macro-economic policy formulation.

**Survey Management**

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

## 2.2 SURVEY METHODOLOGY

**Scope of the Survey**

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

**Sample size**

The survey sample size was designed to capture about one percent of 582,000 tourist arrivals for the year 2004. During the survey a total of 2,772 respondents who represented 6,138 visitors were interviewed. This is more than 100 percent of the envisaged sample size. In order to allow comparability across the years, the sample size has remained consistent to the one used during the 2004 International Visitors' Exit Survey.

**Survey period**

The survey was conducted during the tourist peak season, in order to be able to capture most of tourists' characteristics. In that regard, a two-week survey started on 26$^{th}$ August and ended on the 8$^{th}$ September of 2005. The duration of the survey was in line with the envisaged sample size.

**Coverage**

Since the survey aimed at obtaining data on *inter alia,* expenditure and length of stay, it was necessary that it is carried out at departure points. The survey was conducted at four major departure points, namely Julius Nyerere International Airport (JNIA), Kilimanjaro International Airport (KIA), Zanzibar Airport (ZAA) and Namanga (NAM) border.

**The Questionnaire**

The questionnaire used in the survey comprises of four main parts namely: visitor profiles, travel behaviour, expenditure patterns and visitor comments. (Appendix I)

*Questions 1 and 2* aimed at establishing visitor profiles (nationality, country of residence and age group).

*Questions 3 to 6* targeted at obtaining travel behaviour namely purpose of visit, type of tour (package/non-package), items in the package and nights spent.

*Questions 7 to 11* were structured to capture expenditure of visitors and cost of package tour associated with Tanzania. In addition, the questions requested for details on the amount of money spent in Tanzania.

*Question 12* was aimed at obtaining comments from the visitors on their perception of Tanzania's tourism industry.

## 2.3. TOURIST EXPENDITURE ESTIMATION

Tourist expenditure in the country was estimated using the Tourist Expenditure Model that was developed during the comprehensive visitors' exit survey conducted in 2001.

**The model** is depicted in the following equation:

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

Whereby:

**$E_v$** = Total tourist expenditure in Tanzania

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

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

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

**$V_{NP}$** = Number of arrivals under non-package arrangement (The arrivals as captured by the Immigration Department, adjusted into non-package visitors using survey patterns)

**T** = Average length of stay as computed from immigration statistics.

## 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 ($E_v$) |
|---|---|---|---|---|---|---|---|---|
| | | | | | | 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 2005;**

- The 2001 tourist expenditure model was updated with new average expenditure per person per night as collected in the 2005 survey.
- Calculation of average package tour expenditure involved deduction of estimated cost for international fare to Tanzania and commission accruing to a wholesaler tour organizer. Information on cost of international transport from source markets was updated using current information gathered from international carriers that bring tourists to Tanzania.
- It was assumed that 10 percent of the value of the package is retained by the wholesaler to meet overhead costs and commission. The assumption was based on a study on Tourism Earnings in Tanzania that was conducted in 2000.
- Immigration data on arrivals by purpose of visit were distributed according to package and non-package arrangements using the travel arrangement ratios as established in the survey.
- To be able to estimate annual tourists' expenditure, survey results were applied to the total number of tourist arrivals as recorded by the Immigration Department. It is worth noting that given the homogeneity nature of visitors' characteristics, information collected during the two weeks survey is statistically significant to represent the total population.
- Immigration data provides separate number of tourist arrivals/departures for Zanzibar that enables estimation of tourists' expenditure for Zanzibar.

III

# SURVEY RESULTS

## 3.0 INTRODUCTION

This chapter analyses tourist characteristics in relation to source markets, age, gender and purpose of visit. It will further dwell on travel arrangement, average length of stay together with tourist expenditure.

## 3.1 SOURCE MARKET

**Table 3.1 (a) Top 15 Source Markets in the United Republic of Tanzania**

| S/NO | Country of Residence | Number of Visitors | % of Total |
|---|---|---|---|
| 1 | Italy | 1,404 | 22.9 |
| 2 | United Kingdom | 1,154 | 18.8 |
| 3 | United States of America | 621 | 10.1 |
| 4 | Germany | 495 | 8.1 |
| 5 | Spain | 462 | 7.5 |
| 6 | France | 289 | 4.7 |
| 7 | South Africa | 273 | 4. 5 |
| 8 | Netherlands | 243 | 3.9 |
| 9 | Australia | 200 | 3.3 |
| 10 | Canada | 146 | 2.4 |
| 11 | Belgium | 77 | 1.3 |

| | | | |
|---|---|---|---|
| 12 | Switzerland | 73 | 1.3 |
| 13 | Japan | 63 | 1.0 |
| 14 | Denmark | 61 | 0.9 |
| 15 | Sweden | 53 | 0.9 |
| 16 | Other | 524 | 8.6 |
| | **TOTAL** | **6,138** | **100** |

Table 3.1 (a) Shows that the two weeks survey captured a total of 6,138 visitors who visited Tanzania. Italy led with 22.9 percent of total visitors, followed by the United Kingdom and the United States of America with 18.8 and 10.1 percent, respectively. In the previous surveys, the United Kingdom and United States of America were the first and second source markets. The results also point out new developments whereby Denmark and Sweden were registered among the top fifteen source markets.

Experience of the past three surveys, depict the dominance of Western Europe and North America as "traditional" Tanzanian source markets. Concentration on the two-market block poses a risk to the industry because if there is any negative propaganda against the host country or tragedy in the markets, it would cause serious adverse impact on the industry. In view of this, there is critical need of intensifying promotion to tap new markets particularly China, Japan, and S. Korea. With regards to the Chinese market, Tanzania is a step ahead of many competing countries because in 2003 the Chinese and Tanzania governments signed an agreement that gave Tanzania a "Preferred Destination Status" (PDS). The agreement is crucial since the Chinese government discourages her citizens to take tours to non-PDS countries. Therefore, with product development and aggressive marketing, Tanzania can exploit this huge Chinese tourist market.

**Table 3.1 (b): Top 15 Source Markets to Zanzibar**

| S/N | Country of Residence | Number of Visitors | % of Total |
|---|---|---|---|
| 1 | Italy | 1,279 | 33.3 |
| 2 | United Kingdom | 766 | 19.9 |
| 3 | Spain | 300 | 7.1 |
| 4 | Germany | 248 | 6.6 |
| 5 | France | 211 | 5.5 |
| 6 | South Africa | 193 | 5.0 |
| 7 | Unites States of America | 135 | 3.5 |
| 8 | Netherlands | 118 | 3.0 |
| 9 | Australia | 90 | 2.3 |
| 10 | Canada | 83 | 2.2 |
| 11 | Denmark | 43 | 1.3 |
| 12 | Switzerland | 42 | 1.1 |
| 13 | Sweden | 38 | 0.9 |
| 14 | Belgium | 30 | 0.8 |
| 15 | Ireland | 23 | 0.6 |
| 16 | Other | 263 | 6.9 |
| | **TOTAL** | **3,842** | **100** |

On the other hand, table 3.1(b) indicates that 3,842 visitors from 56 countries visited Zanzibar. During the survey period it was established that Italy remained the most important source market in Zanzibar. Other equally important source markets include United Kingdom and Spain. The significance of Italy and Spain to Zanzibar destination is largely explained by the existence of Italian hotel investments as well as arrangement of direct charter flights from Italy and Spain to Zanzibar during the peak season. Furthermore, the increase in the number of Spanish visitors is largely explained by the participation of Zanzibar in the Spanish tourist exhibition known as FITUR. The Zanzibar participation in FITUR international exhibition that started in 2001, draws participants from various tourism stakeholders in Zanzibar. The exhibition involves display of tourist products, traditional dances, art crafts as well as participation in seminars and workshops.

### 3.2 AGE GROUP

Table 3.2.1 (a) shows that the majority of visitors belong to the age group of '18 – 55', accounting for 85.0 percent of all visitors interviewed, whereas those of above 55 years represent 14.2% only. This has been the case for the past surveys conducted in 2001 and 2004.

However, it should be noted that most of the visitors captured in the surveys come from countries that are "aging population". The fact that these countries have a great proportion of its citizens in the age group of 55 and above, coupled with the trend to retire early from active employment, leads to potential for tourism. Nevertheless, it is noted with concern that in all the three surveys the number of visitors of the 55+ age group has been minimal besides all the advantages accredited to the group, notably more disposable income and ample time for leisure.

In that regard, there is a need to formulate programs which are tailored towards tapping this readily 'emerging' market. This age group needs special attention when it comes to advertising programs as they heavily rely on travel agents, travel magazines and travel channels to get information, unlike other age groups which mostly use the Internet as their basic source of information.

**Table 3.2.1 (a): Number of Interviewees by Age Group**

| Age Group (Years) | Number of Respondents | % of Total |
|---|---|---|
| Below 18 | 22 | 0.8 |
| 18 - 35 | 1,365 | 49.2 |
| 36 - 55 | 993 | 35.8 |
| 55+ | 392 | 14.2 |
| **Total** | **2,772** | **100.0** |

Table 3.2.1 (b) shows the interviewees by source markets and age group. As depicted in the 2004 report, Japan, Australia and the United States of America continued to record the highest proportion of senior citizen (55+) visitors. Italy and Spain took the lead in the age group of "18–35" with percentages of 59.0 and 55.9, respectively while South Africa maintained the prominence in the age group of "36 – 55" with 49.0 percent. In view of this, it is advocated that tourism stakeholders should use these results for informed marketing and promotion strategies.

**Table 3.2.1 (b): Interviewees by Country of Residence and Age Group**

| S/N | Country | Age Group | | | | Total Interviewees |
|---|---|---|---|---|---|---|
| | | % of <18 | % of 18 - 35 | % of 36 - 55 | % of 55+ | |
| 1 | United Kingdom | 0.9 | 54.9 | 32.8 | 11.4 | 552 |
| 2 | Italy | 0.0 | 59.0 | 36.4 | 4.5 | 376 |
| 3 | United States of America | 0.0 | 39.6 | 32.0 | 28.4 | 338 |
| 4 | Germany | 0.4 | 50.7 | 33.6 | 15.2 | 223 |
| 5 | Spain | 0.5 | 55.9 | 41.3 | 2.3 | 213 |
| 6 | Australia | 0.0 | 36.4 | 34.3 | 29.3 | 140 |
| 7 | South Africa | 0.0 | 38.7 | 48.9 | 12.4 | 137 |
| 8 | Netherlands | 3.3 | 41.5 | 39.8 | 15.4 | 123 |
| 9 | France | 4.2 | 54.2 | 32.2 | 9.3 | 118 |
| 10 | Canada | 1.4 | 42.3 | 46.5 | 9.9 | 71 |
| 11 | Japan | 0.0 | 51.1 | 21.3 | 27.7 | 47 |
| 12 | Switzerland | 0.0 | 46.2 | 30.8 | 23.1 | 39 |
| 13 | Denmark | 0.0 | 52.9 | 35.3 | 11.8 | 34 |
| 14 | Belgium | 3.0 | 48.5 | 45.5 | 3.0 | 33 |
| 15 | Sweden | 0.0 | 53.8 | 34.6 | 11.5 | 26 |
| | **Average** | **0.9** | **48.4** | **36.3** | **14.4** | **2,470** |

### 3.2.2 GENDER

**Table 3.2.2: Visitors by Gender**

| | Number of Visitors | % of Total |
|---|---|---|
| Males | 3,299 | 53.7 |
| Females | 2,839 | 46.3 |
| | **6,138** | **100.0** |

The survey results show that among the total visitors, 54 percent were males while 46 percent represented female visitors, as depicted in table 3.2.2. The male dominance trend has also been observed in the previous surveys, owing partly to the fact that females are more cautious in safety issues than males when long - haul travelling is involved.

## 3.3 PURPOSE OF VISIT

**Table 3.3.1: Purposes of Visit to Tanzania**

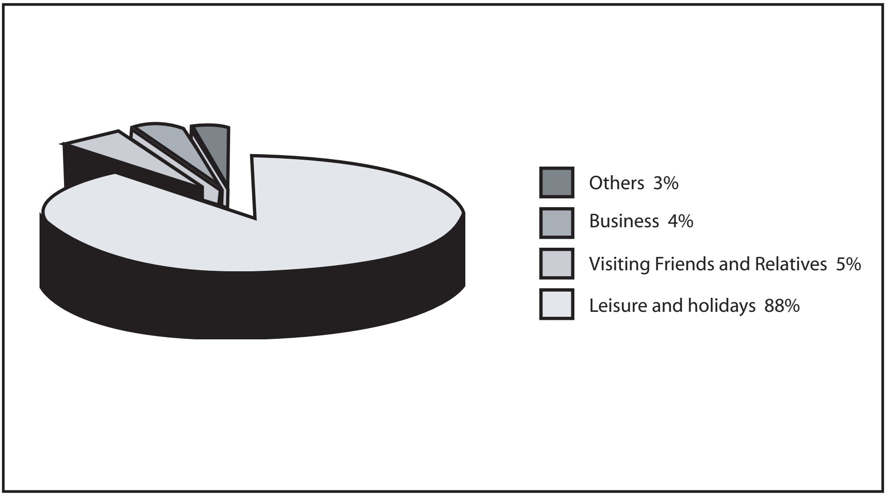


Table 3.3.1 indicates that a large number of visitors (88.5 percent) came to Tanzania for leisure and holidays, followed by those who came to visit friends and relatives accounting for 4.9 percent, while business purposes stood at 3.8 percent. The dominance of visitors coming for leisure and holiday has been the same as in the surveys conducted in 2001 and 2004. Similarly, the survey results continue to portray the small share of business visitors. Meanwhile, experience shows that, many tourists come to Tanzania Mainland for the purpose of exploring wildlife while those visiting Zanzibar do so with the preference of touring cultural and historical sites and at the same time enjoy the white sandy and sunny beaches. Hence, in order to sustain and increase the flow of tourists, there is a crucial need to diversify tourist products. In addition, stakeholders are urged to make efforts to satisfy holiday-makers through ensuring that their expectations are fully met as well as improving and/or maintaining high quality services.

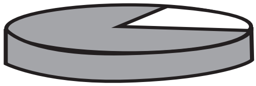
In this regard, efforts should be made to introduce and develop other tourism products such as ecotourism and cultural tourism among others. Likewise, Meetings, Incentives, Conferences and Exhibitions (MICE) tourism potential need to be developed between the relevant partners and stakeholders.

Table 3.3.2, shows that Italy and Spain were prominent sources of holiday-makers, while, South Africa took the lead in the number of business visitors. The predominance of South African business visitors is consistent with the increasingly growing South African investments in Tanzania; for instance, investments in mining, banking, telecommunications and hospitality industries, just to mention a few.

**Table 3.3.2: Purposes of Visit by country (in Percentage)**

| Country/ Purpose | UK | USA | Netherlands | Germany | South Africa | France | Spain | Australia | Canada | Switzerland | Sweden | Denmark | Japan | Belgium | Italy |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Business | 2.1 | 5.6 | 2.1 | 2.2 | 20.9 | 1.7 | 0.9 | 5.5 | 2.7 | 6.8 | 1.9 | 3.3 | 3.2 | 1.3 | 0.6 |
| Holiday | 89.5 | 83.9 | 88.9 | 77.6 | 70.3 | 95.2 | 98.3 | 87.0 | 94.5 | 82.2 | 77.4 | 88.5 | 93.7 | 87.0 | 96.2 |
| Others | 2.9 | 2.7 | 5.3 | 4.4 | 0.7 | 2.8 | 0.0 | 2.0 | 0.7 | 4.1 | 20.8 | 4.9 | 0.0 | 2.6 | 1.4 |
| VFR | 5.5 | 7.7 | 3.7 | 15.8 | 8.1 | 0.3 | 0.9 | 5.5 | 2.1 | 6.8 | 0.0 | 3.3 | 3.2 | 9.1 | 1.7 |
| **Total (%)** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** |

## 3.4 TRAVEL ARRANGEMENTS




Survey results depict that 69.0 percent of all visitors travelled on a package tour, an increase from 65.0 percent recorded in 2004. Those on a non-package arrangement accounted for 31.0 percent of all visitors.

Visitors from Italy followed by the United Kingdom, United States and Spain dominated the package tour arrangement that include accommodation, international transport, internal transport and sightseeing. Non-package visitors from the United Kingdom took the lead followed by Germany and United States.

**Table 3.4.1: Proportion of Visitors by Country of Residence and Travel Arrangement**

| S/N | Country of Residence | Travel Arrangement | | Total Visitors |
|---|---|---|---|---|
| | | % of Non Package | % of Package | |
| 1 | Italy | 3.0 | 19.9 | 1,404 |
| 2 | United Kingdom | 7.8 | 11.0 | 1,154 |
| 3 | United States of America | 3.1 | 7.0 | 621 |
| 4 | Germany | 4.7 | 3.3 | 495 |
| 5 | Spain | 1.1 | 6.4 | 462 |
| 6 | France | 1.4 | 3.3 | 289 |
| 7 | South Africa | 1.8 | 2.6 | 273 |

| | | | | |
|---|---|---|---|---|
| 8 | Netherlands | 0.9 | 3.0 | 243 |
| 9 | Australia | 0.9 | 2.4 | 200 |
| 10 | Canada | 0.6 | 1.8 | 146 |
| 11 | Belgium | 0.5 | 0.8 | 77 |
| 12 | Switzerland | 0.4 | 0.8 | 73 |
| 13 | Japan | 0.3 | 0.8 | 63 |
| 14 | Denmark | 0.5 | 0.5 | 61 |
| 15 | Sweden | 0.4 | 0.5 | 53 |
| 16 | Others | 3.9 | 4.7 | 524 |
| | **TOTAL** | **31.2** | **68.8** | **6,138** |

The dominance of package tour arrangement is not peculiar to Tanzania. It is a common phenomenon in international tourism especially for long-haul destinations. Although most of the payments under package tour arrangement are made at source markets, the proceeds are transferred to the destination country to cater for payment of services e.g. accommodation and internal transport that are consumed by the visitors. The growth of investment in local tourism establishments, such as the expansion and renovation of Impala hotel in Arusha as well as Peacock and Courtyard hotels in Dar es Salaam suggests that the prepaid money is remitted to the country.

Likewise, in recent years, remarkable investments have been recorded by tour operators in terms of increased number and quality of transportation and communication equipment. However, in order to fully benefit from package tour arrangement, it is recommended that tour operators should directly penetrate to the existing source markets. This calls for availability of adequate capital, capacity building in information technology and negotiation skills.

Table 3.4.1 shows that most of the visitors on business and VFR preferred travelling under non-package arrangement, while the majority of holiday-makers came under package tour arrangement. The same pattern was observed in the comprehensive and annual tourism surveys of 2001 and 2004, respectively. The pronouncement of holiday-makers under package tour is explained by the positioning of major source markets of Tanzania. Since the country is a long-haul destination, holiday-makers prefer to travel under package tour arrangement because it is an organized program with more certainty as one knows in advance what to exactly expect at the destination.

**Table 3.4.2: Proportion of Visitors by Travel Arrangement and Purpose of Visit**

| | Purpose of Visit by Percentage | | | |
|---|---|---|---|---|
| **Travel Arrangement** | **Business** | **Leisure and Holiday** | **VFR** | **Other** |
| Package Tour | 13.7 | 75.8 | 8.9 | 25.6 |
| Non-Package Tour | 86.3 | 24.2 | 91.1 | 74.4 |
| **(%) of Total Visitors** | **100** | **100** | **100** | **100** |

In order to enhance benefits accruing from tourism, there is need to strengthen mutual linkages between local communities and suppliers of tourism products. In this regard, local communities should be empowered to fully exploit available opportunities created by tourism investments. The Government and other stakeholders are urged to facilitate provision of skills to locals to work in the tourism and hospitality industry, while hotel establishments should be encouraged to utilise local produce such as vegetables, fruits and poultry among others. In addition, the government should work on increased provision of credit to Small and Medium Enterprises (SME's).

## 3.5 AVERAGE LENGTH OF STAY

Table 3.5.1 (a) reveals visitors' average length of stay in the United Republic of Tanzania during the 2005 survey period. The visitors from Europe namely Italy, United Kingdom, Germany, Spain, France, Netherlands and Denmark had the highest average length of stay of 14 nights. These countries were followed by the United States and Canada which had an average of 13 nights each. Visitors from Japan recorded the lowest average of eight days. For the top 15 countries, the average length of stay for non-package and package tour was 13 nights and 11 nights, respectively. Under the package tour arrangement, the highest average length of stay in the United Republic of Tanzania was 13 nights recorded by the United Kingdom, United States of America, Germany, France, Spain, Netherlands and Australia. Regarding non-package, visitors from Denmark had the highest average length of stay of 16 nights, followed by Italy and Spain with average length of stay of 15 nights.

**Table 3.5.1 (a): Average Length of Stay of Visitors to the United Republic of Tanzania**

| S/N | Country | Non-Package Visitors' CountryAverage | Package Visitors' Country Average | Average |
|---|---|---|---|---|
| 1 | Italy | 15 | 12 | 14 |
| 2 | United Kingdom | 14 | 13 | 14 |
| 3 | United States | 13 | 13 | 13 |
| 4 | Germany | 15 | 13 | 14 |
| 5 | Spain | 15 | 13 | 14 |
| 6 | France | 14 | 13 | 14 |
| 7 | South Africa | 9 | 9 | 9 |
| 8 | Netherlands | 15 | 13 | 14 |
| 9 | Australia | 11 | 13 | 12 |
| 10 | Canada | 15 | 11 | 13 |
| 11 | Belgium | 9 | 10 | 10 |
| 12 | Switzerland | 11 | 10 | 11 |
| 13 | Japan | 9 | 6 | 8 |
| 14 | Denmark | 16 | 11 | 14 |
| 15 | Sweden | 10 | 10 | 10 |
| | **Average** | **13** | **11** | **12** |

The three surveys indicate that on average, a visitor spends around 12 nights in the United Republic of Tanzania.

The survey results, as shown on table 3.5.1 (b), portray the average length of stay for visitors who toured Tanzania Mainland. For the top 15 source markets, the average length of stay for Tanzania Mainland was 11 nights. The visitors who had the longest average length of stay came from Canada and Germany. When considering non-package tour, the average length of stay was 16 nights for the two countries. Conversely, under package tour, the highest average length of stay was 13 nights recorded by Switzerland.

Table 3.5.1 (c) presents the average length of stay for visitors who toured Zanzibar during the survey. The average length of stay for package and non package tourists was 7 nights, the same as what was recorded in the 2004 Survey. The highest average length of stay was 10 nights recorded by Italy, which is the significant tourism source market for Zanzibar.

**Table 3.5.1 (b): Average Length of Stay of Visitors to Tanzania Mainland**

| S/N | Country | Non-Package Visitors' Country Average | Package Visitors' Country Average | Country Average |
|---|---|---|---|---|
| 1 | Italy | 13 | 9 | 11 |
| 2 | United Kingdom | 14 | 11 | 13 |
| 3 | United States | 13 | 12 | 13 |
| 4 | Germany | 16 | 12 | 14 |
| 5 | Spain | 12 | 11 | 12 |

| | | | | |
|---|---|---|---|---|
| 6 | France | 10 | 12 | 11 |
| 7 | South Africa | 10 | 7 | 9 |
| 8 | Netherlands | 13 | 10 | 12 |
| 9 | Australia | 13 | 10 | 12 |
| 10 | Canada | 16 | 11 | 14 |
| 11 | Belgium | 9 | 10 | 10 |
| 12 | Switzerland | 10 | 13 | 12 |
| 13 | Japan | 9 | 6 | 8 |
| 14 | Denmark | 10 | 11 | 11 |
| 15 | Sweden | 10 | 8 | 9 |
| | **Average** | **12** | **10** | **11** |

The 2001, 2004 and 2005 survey results depict that the average length of stay in Zanzibar was lower compared to that of Tanzania Mainland. This is partly attributed to the larger size of the Mainland with numerous tourist attractions.

**Table 3.5.1 (c): Average Length of Stay of Visitors to Zanzibar**

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

## 3.6 TOURIST EXPENDITURE

As already pointed out, estimation of tourist expenditure for both Tanzania and Zanzibar is one of the main objectives of the Visitors' Exit Survey. Using the survey results and annual tourist arrivals from Immigration Department, it is estimated that in 2005, international visitors earned Tanzania and Zanzibar US$ 823,589,393 and US$111,358,688, respectively.

These earnings accrued from the 612,754 international visitors who came to Tanzania, out of which 74,396 tourists visited Zanzibar. The survey results indicate that overall, a tourist spent an average of US$ 141 per night. Whereas, on average a tourist under package arrangement spent

US$ 156 per day, a non-package tourist spent US$ 125. In comparison with 2004 estimates, the average expenditure per day for package and non-package tourists were US$ 188 and US$ 119, respectively. The estimated expenditure includes accommodation, ground transportation, shopping and other expenses. Consistent with the survey results of 2001 and 2004, on average visitors under package arrangement spend more compared with visitors under non-package arrangement. The phenomenon is largely explained by the fact that a package is an organized program with more certainty, as one knows in advance what to expect. The certainty justifies a premium, such that in most cases well-to-do holiday travellers prefer package arrangements.

In computing average expenditure, it is important to note that an estimate of the international fare to Tanzania and the commission to a wholesaler (paid by a package tourist before coming to destination) were deducted[1]. Under both arrangements, the cost includes accommodation, ground transportation, park fees, meals, shopping and other payments while in the country and therefore, the expenditures under the two arrangements are comparable. Notably, under package arrangements, funds collected in the source markets are remitted to the country to cater for services rendered at the destination.

The results (Table 3.6.1) point out that, the United Kingdom and United States of America recorded the highest average package expenditure per night of US$ 285 and US$ 284, respectively. On the other hand, the lowest average package expenditure of US$ 111 per day was recorded by South Africa, the only Sub Saharan country under top 15 source markets. For the non-package visitors, while the highest average expenditure per person per night was US$ 175 recorded by Japan, the lowest among the top 15 source markets was recorded by Belgium (US$ 90). In general, the results on average expenditure are in line with the general income levels of the respective countries.

[1] Refer to methodology, on the basis for the deduction of the international transportation cost and commission

**Table 3.6.1: Visitors' Average Expenditure per Night: (Top 15 Source Markets)**

| | Country | Average Package Expenditure (US$) | Average Non- Package Expenditure (US$) |
|---|---|---|---|
| 1 | Italy | 188 | 97 |
| 2 | United Kingdom | 285 | 126 |
| 3 | USA | 284 | 149 |
| 4 | Germany | 142 | 93 |
| 5 | Spain | 171 | 135 |
| 6 | France | 212 | 112 |
| 7 | South Africa | 111 | 136 |
| 8 | Netherlands | 142 | 111 |
| 9 | Australia | 139 | 132 |
| 10 | Canada | 177 | 140 |
| 11 | Belgium | 169 | 90 |
| 12 | Switzerland | 189 | 148 |
| 13 | Japan | NA* | 175 |
| 14 | Denmark | NA* | 110 |
| 15 | Sweden | 120 | 128 |
| | **Average** | **155.27** | **125.47** |

* *No Package visitor from Japan and Denmark was encountered during the field work*

## 3.7 EXPENDITURE AT DESTINATION

In order to analyse the contribution of tourism industry in the economy, the survey attempted to examine the proportion of tourist expenditure by sectors. The expenditure of non-package tourists was used, given that payments were directly made by the respondents; hence it was relatively easier to remember the incurred expenditure. As for tourists under package travel, most of the payments were pre-paid in wholesome amount at source markets, thus rendering difficulties in desegregating the expenditure by sector.

**Table 3.7.1: Tourist Expenditure by Category**

| Item | Accommodation | Transport | Shopping | Other | Total |
|---|---|---|---|---|---|
| Percentage (%) | 29 | 28 | 12 | 31 | 100 |

The survey results revealed that expenditure on accommodation establishments accounted for 29 percent, Transport entities by 28 percent, retailing by 12 percent while other payments consumed 31 percent of the total expenditure (Table 3.7.1). The results pointed out the importance of accommodation and transportation sectors in the tourism industry. On the other hand, the dominance of the ‘’others ‘’ category may be attributed to the problem of memory recall, as most of the respondents tended to lump miscellaneous expenditure into this category. Comments from visitors indicated that items under ‘’others” included things like visa fees and airport charges. In view of this, the questionnaire in the future surveys will be reviewed to accommodate desegregation of “others” expenditure category. This desegregation is particularly important given the need of the information for the improvement of compilation of National Accounts statistics.

## 3.8 COMMENTS BY VISITORS

Table 3.8.1 summarises the perceptions of visitors regarding their experience in Tanzania. In view of this, visitors were requested to give comments or suggestions on services rendered to them during their stay. The results revealed that about 83 percent of respondents gave comments that show high levels of satisfaction. The visitors pointed out that they were impressed by the welcoming and friendliness of Tanzanians and attractiveness of the country. On the other hand, about 17 percent suggested the need to improve the state of infrastructure and customer services.

Other areas for necessary improvement included toilet facilities in the parks, campsites and streets. In particular, visitors stressed the need to improve toilets condition at Zanzibar Airport. Furthermore, respondents requested interventions in areas ranging from smoothining of entry formalities, introducing local menus at eating places, to making available information about tourism facilities. They further indicated that the services offered were slow and poor. In that line, improvement on customer service remains a challenge to the stakeholders in the tourism industry.

**Table 3.8.1: Visitors' comments**

| S/n | Comments | VISITORS | % |
|---|---|---|---|
| 1 | Good service | 2,258 | 32.5 |
| 2 | Friendly people & wonderful country | 1,568 | 22.6 |
| 3 | Excellent experience | 838 | 12.1 |
| 4 | Improve on infrastructure | 500 | 7.2 |
| 5 | Satisfied and hope to come back | 384 | 5.5 |
| 6 | Improve facilities (toilets, water, electricity, parks, camps, street, hotels etc) | 246 | 3.5 |
| 7 | Quality of touring services (tour programmes, competent guides etc) | 255 | 2.8 |
| 8 | Too many tips demanded | 134 | 1.9 |
| 9 | Slow/poor customer service | 132 | 1.9 |
| 10 | Slow airport procedures | 131 | 1.9 |
| 11 | High prices | 119 | 1.7 |
| 12 | High visa fees | 69 | 1 |
| 13 | Flycatchers/vendors are annoying | 67 | 1 |
| 14 | Put more emphasis on conservation measures | 66 | 1 |
| 16 | Improve on security | 40 | 0.6 |
| 17 | Lack of information on tourist attractions | 38 | 0.5 |
| 18 | High park fees | 33 | 0.5 |
| 19 | Lack of transparency in pricing | 33 | 0.5 |
| 20 | Introduce local menu in tourist hotels | 20 | 0.3 |
| 21 | Direct flight from source market | 8 | 0.1 |
| 22 | Inadequate shopping facilities | 8 | 0.1 |
| | **Total** | **6,947** | **100** |

IV

# CONCLUSION AND RECOMMENDATIONS

## 4.0 CONCLUSION

This report concludes the International Visitors' Exit Survey that was conducted for two weeks between August and September 2005. The survey had the following objectives:

- Updating information on prices used for estimating tourist expenditure in the country; and
- Gathering information useful in promoting tourism and improve macro-economic policy.

The survey has been a success as it has met both objectives. Using the model that was developed in the 2001 International Visitors' Exit Survey, and updated price information obtained from the 2005 survey, it is estimated that Tanzania tourist earnings for 2005 were US$ 823,589,393. Out of that amount, Zanzibar's earnings were estimated at US$ 111,358,688.4.

## 4.1 RECOMMENDATIONS

- The three consecutive surveys have established the dominance of Western Europe and North America blocks as traditional Tanzanian source markets. In this regard, TTB in collaboration with the private sector should work tirelessly to maintain current markets while at the same time diversify to new markets such as China, India, South Korea and other countries in Eastern Asia.
  *Responsible Institutions: Tanzania Tourist Board, Tourism Confederation of Tanzania and Zanzibar Commission for Tourism*

- In all the three surveys, it has been established that visitors belonging to the age group 18 to 55 years account for more than three-quarters of all visitors. In this regard, the tour organizers while improving facilities for the 'under 55 age group', they should also spearhead suitable programmes targeting senior citizens (55+).
  *Responsible Institutions: Tourism Confederation of Tanzania(TCT), Zanzibar Association of Tourism Investors (ZATI)*

- The survey results continue to depict small proportion (about 4 percent) of visitors who came for business purposes. In view of this, government through the Tanzania Investment Centre (TIC) should continue with efforts to attract more investments pertaining Meetings, Incentives, Conferences and Exhibitions (MICE).
  *Responsible Institutions: Tourism Confederation of Tanzania, Tanzania Tourist Board, Tanzania Investment Centre and Ministry of Foreign Affairs and International Cooperation.*

- Since most tourists who visit the Northern circuit enter Tanzania through Namanga, it is recommended that the usage of KIA should be promoted by encouraging additional international airlines. Currently, KLM is the only scheduled airline that flies to KIA directly from Europe, with Ethiopian airline and Air Condor flying three times a week. Furthermore, in order to encourage visitors coming directly to destination Tanzania, the renaissance of the National carrier is vital.
  *Responsible Institutions: Tanzania Airport Authority, Ministry of Infrastructure Development and Tanzania Civil Aviation Authority.*

- In order to prolong length of stay and increase earnings at destination, it is recommended that there should be concerted efforts to diversify tourist products such as eco-tourism, cultural, conference and meeting tourism and market them.

- In order to improve quality of services, TANAPA and Municipalities are urged to increase more amenities such as washrooms in the parks, campsites and along highways. Also, Municipalities need to substantially increase the number of public toilets in their respective localities in order to promote urban tourism.

- For Eliminating Poverty an integrative tourism programme should be developed in order to strengthen mutual linkages between local communities and tourism establishments. Host communities should be assisted to take up opportunities created by tourism investments. For example, provision of local supplies needed by the establishments including fresh agricultural produce.

- To improve efficiency in generation and dissemination of tourism statistics, sections that deal with statistics in both the Immigration Department and the Ministry of Natural Resources and Tourism should be strengthened financially and be allocated with more qualified personnel. In addition, the Government should hasten the program of connecting electronically all immigration points, such that in future data entry is done at entry points.
  *Responsible Institutions: The Ministry of Natural Resources and Tourism and Immigration Department*

- In order to enhance efficiency and improve services at Airports, Airport Authorities, Immigration Dept and Customs are urged to take appropriate and timely measures to reduce the time taken for entry/departure clearance formalities and improve facilities.
  *Responsible Institution: Tanzania Airport Authority, Immigration and Customs*

# APPENDIX

# THE 2005
# INTERNATIONAL EXIT VISITORS' SURVEY

## INTRODUCTION

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

**FOR OFFICIAL USE**

CODE NUMBER ......................................................................

NAME OF ENUMERATOR ......................................................

DATE ......................................................................................

SIGNATURE: ...........................................................................

# INTERNATIONAL VISITORS' EXIT SURVEY

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

2. Age Group *(tick)*

   <18...........................................................[ ]
   18 – 35......................................................[ ]
   36 – 55......................................................[ ]
   55+............................................................[ ]

3. Main purpose of visit to Tanzania Business................[ ]
   Leisure and Holidays..........................................[ ]
   Visiting Friends and Relatives..............................[ ]
   Other (please specify).........................................[ ]

4. Did you use package tour? ..............................................

   Yes [ ] No [ ] *If 'NO' go to question 8.*

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

   International transport.......................................[ ]
   Accommodation..................................................[ ]
   Internal transportation.......................................[ ]
   Sightseeing/excursion/game activities ......................[ ]
   Other (please specify) .........................................[ ]

6. Total number of nights in the package tour INCLUDING

nights spent in other countries ..........................................

7. Total cost of the package tour: Currency .......................

8. Number of nights spent in: Tanzania Zanzibar
Tanzania Mainland .......................................................

9. Number of people in your group including children and yourself whose expenditure is on one account..................

Females ..................................................................
Males .......................................................................

10. How much money in total did you spend in Tanzania during this trip? *(please give your best estimate in case you do not remember exact figures)*

Currency ..................................................................

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

Accommodation: Currency ...................

*(include food and drinks paid as part of accommodation)*

Transportation (include organised tour): Currency. .........

Shopping: ...............................................................
Currency ..................................................................

Others *(please specify)* .............. Currency………………

12. Your comments and / or recommendations on services

rendered to you.............................................................

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