THE 2022 INTERNATIONAL VISITORS' EXIT SURVEY REPORT

TANZANIA TOURISM SECTOR SURVEY

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ABBREVIATIONS AND ACRONYMS

AAKIA	Abeid Amani Karume International Airport
BOT	Bank of Tanzania
GDP	Gross Domestic Product
HAT	Hotel Association of Tanzania
HAZ	Hotel Association of Zanzibar
ILO	International Labour Organization
JNIA	Julius Nyerere International Airport
KIA	Kilimanjaro International Airport
MICE	Meetings, Incentives, Conference and Exhibitions
MNRT	Ministry of Natural Resources and Tourism
MTH	Ministry of Tourism and Heritage
MWT	Ministry of Works and Transport
NBS	National Bureau of Statistics
TAA	Tanzania Airports Authority
TANAPA	Tanzania National Parks Authority
TCT	Tourism Confederation of Tanzania
TIC	Tanzania Investment Centre
TSA	Tourism Satellite Account
TTB	Tanzania Tourist Board
UNWTO	United Nations World Tourism Organization
URT	United Republic of Tanzania
VFR	Visiting Friends and Relatives
ZAA	Zanzibar Airport Authority
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 period, all economic transactions between residents and non-residents. It consists of current account, capital account, and financial account.

Commissions: percent of the total product cost paid to travel agents and other travel product distributors for selling the product or service to the 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 such as 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.

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: the period of the year when occupancy/usage of accommodation facilities is the highest.

Inbound tourism: comprises the activities of a non-resident visitor within the country of reference.

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

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 accommodation facilities is the lowest.

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 as well as expenses that are paid for or reimbursed by others.

Travel agent: a person engaged in selling and arranging transportation, accommodations, tours, or trips for travellers.

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

Tourism is one of the most thriving activities in Tanzania with vast attractions comprising Serengeti, Ngorongoro and white sand beaches in Zanzibar, a rich diversity of cultures, scenic places, and the highest mountain – Kilimanjaro. Tanzania has both comparative and competitive advantages that attract tourists in search of authentic new experiences and those seeking to escape to nature.

Based on these attractions and Government efforts to market and implement its tourism policy and strategic plans, Tanzania has shown a tremendous growth with number of international visitors increased by 57.7 percent to 1,454,920 in 2022, from 922,692 recorded in 2021. Consequently, international tourism earnings increased to USD 2,527.8 million in 2022, from USD 1,310.3 million in 2021. The prospects for 2023 are brighter compared to 2022, and expected to continue improving further in the medium term following the rolling out of vaccines and easing of travel restrictions in many economies.

The major source markets were the United States of America, the United Kingdom and France. Kenya, Zambia and Zimbabwe were the dominant source markets in sub-Saharan Africa. Meanwhile, leisure and holidays continued to be the main purpose of visit to Tanzania and the major tourism activities were the wildlife and the beaches.

This report unveils the results of the 2022 Tanzania Tourism Sector Survey (TTSS), conducted jointly by the Ministry of Natural Resources and Tourism (MNRT), Bank of Tanzania (BOT), National Bureau of Statistics (NBS), Immigration Services Department (ISD) and the Zanzibar Commission for Tourism (ZCT).

The report will be an important tool to various stakeholders in the tourism sector for strategizing better services and informed policy decisions.

Dr. Hassan Abbas
Permanent Secretary
Ministry of Natural Resources and Tourism

Mr. Emmanuel. M. Tutuba
Governor
Bank of Tanzania

ACKNOWLEDGEMENT

The Steering Committee of the Tanzania Tourism Sector Survey wishes to convey profound gratitude to various stakeholders for successful completion of the 2022 International Visitors' Exit Survey. Special appreciation should go to the Chief Executives of the participating institutions namely; the Ministry of Natural Resources and Tourism, Bank of Tanzania, National Bureau of Statistics, Immigration Service Department, Zanzibar Commission for Tourism, and the Tourism Confederation of Tanzania for their valuable support and guidance.

Particular recognition is extended to the immigration officers in-charge at the Julius Nyerere International Airport (JNIA) in Dar-es Salaam, Abeid Amani Karume International Airport (AAKIA), Kilimanjaro International Airport (KIA), Namanga, Kasumulo and Tunduma boarder points. Likewise, our profound thanks should go to field enumerators and data entrants for making the survey a success.

The 2022 International Visitors‘ Exit Survey Report was conducted under the supervision and guidance of the following Steering Committee Members: Mr. Phillip Chitaunga, MNRT; Dr. Suleiman Missango, BOT; Mr. Daniel Masolwa, NBS; Ms. Mariam Mwanzalima, ISD; Mrs Aviwa Issa, ZCT and the Mr. Richard Rugimbana, TCT.

The implementation of the survey and report writing was conducted by the Technical Committee Members led by Mr. Paskasi Mwiru (MNRT) and Ms. Villela Waane (BOT). Other members are Phillip Mboya, Gloria Mbiha, Dr. Gabriel Mafie, Tumaini Longishu, Taimur Kattanga, Placydia Kamazima, Rweyemamu Barongo, Elisha Mkandya and Eliya Jairo 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

This report provides a summary of domestic and global tourism developments. It also covers the findings of the 22nd cycle of the International visitors' Exit Survey that was conducted in 2022.

Global tourism developments

International tourism saw a robust growth in 2022, backed by pent-up demand and the lifting or relaxation of travel restrictions in many countries. Despite the headwinds, including the emergence of new variants, the war in Ukraine and climate changes, international tourism showed resilience, as reflected in its strong recovery in arrivals. Over 900 million tourists travelled internationally in 2022, double those in 2021, albeit 37 percent fewer than the pre-pandemic levels.

Tourism developments in Tanzania

Tanzania's tourism sector showed high level of resilience, reflected by tourists' arrivals and per capita spending. Measures taken by the governments and the private sector helped to cushioned the industry from the adverse effects. As a result, the number of international visitors increased by 57.7 percent to 1,454,920 in 2022, from 922,692 recorded in 2021. Correspondingly, international tourism earnings increased to USD 2,527.8 million in 2022, from USD 1,310.3 million in 2021.

Some of the initiatives and conditions that are likely to contribute positively to tourism growth in 2022 include:

- Launching of the Royal Tour in the United States of America in April 2022. The airing of this documentary will continue to market the country's tourist attractions worldwide and revive the tourism industry after the aftermath of COVID-19 pandemic.
- Launching of the Festival of Black Arts and Culture (FESTAC) 2022 at Verde Hotel in May 2022, aiming at boosting intra-Africa trade, arts, culture, tourism and travel, literature and poets, music, food, and fashion, as well as other businesses across the continent.
- Hosting of a mega cruise ship carrying 573 crew members and 1,400 tourists that docked at Dar es Salaam and Zanzibar Ports for a four

days' tour in November 2022. While in Tanzania, tourists visited Nyerere National Park, Bagamoyo, Mikumi and Dar es Salaam City in Tanzania Mainland and Stone Town, Spice Tours, Jozani Forest and Nakupenda Tours in Zanzibar.

- Hosting of the 65th United Nations World Tourism Organization-Commission for Africa, Meeting in Arusha in October 2022. The meeting is part of UNWTO's statutory occasions, whereas a country hosts this event upon fulfillment of the set requirements, which include sustainable and responsible tourism. Delegates also visited various tourism attraction in Arusha as a way of promoting Tanzania's tourist attractions.
- Launching of the high speed internet at the top of Mt. Kilimanjaro in August 2022. The launching of high-speed broadband internet at the top of the highest mountain in Africa will enable tourists to communicate worldwide.

Apart from these initiatives, destination Tanzania received various awards in 2022, for recognition of the outstanding performance in the tourism industry. The awards include the best tour guide of 2022, World Travel Awards of 2022 and the best tourism boards in Africa.

Main findings of the 22nd cycle of tourism exit survey

The top 15 source markets in 2022 represent 80 percent of all visitors. The majority of visitors were from Kenya, the United States of America and the United Kingdom. Italy, the United Arab Emirates, and India were the new entrants to the top 15 source markets in 2022, replacing Belgium, Switzerland and the Netherlands, which was recorded in 2021.

Leisure and holidays,VFR and business continue to be the main purpose of visit to Tanzania for the visitors of all age groups.

The majority of visitors came under the non-package tour arrangement. Visitors from, the United States of America, Germany and France mainly came under the package tour arrangement, while visitors from the neighbouring countries such as DR Congo, Burundi and Zimbabwe ranked high in the non-package tour arrangement.

The overall average length of stay was 9 nights in 2022 compared with 10 nights in 2021. Visitors from Germany stayed the longest, with an average of 14 nights. Visitors from Kenya, Burundi and Zimbabwe stayed the least. In Zanzibar, the overall average length of stay was 7 nights.

The overall average expenditure per person per night in the United Republic of Tanzania was USD 214, compared to USD 199 recorded in 2021. Leisure and holiday visitors had the highest average expenditure of USD 274, followed by visitors who came for business. In Zanzibar, the overall average expenditure was USD 218 per person per night compared to USD 199 in 2021. Holidaymakers had the highest average expenditure of USD 243.

The number of international visitors increased by 57.7 percent to 1,454,920 in 2022, from 922,692 recorded in 2021. Correspondingly, international tourism earnings rose by 92.3 percent to USD 2,527.8 million in 2022, from USD 1,310.3 million in 2021.

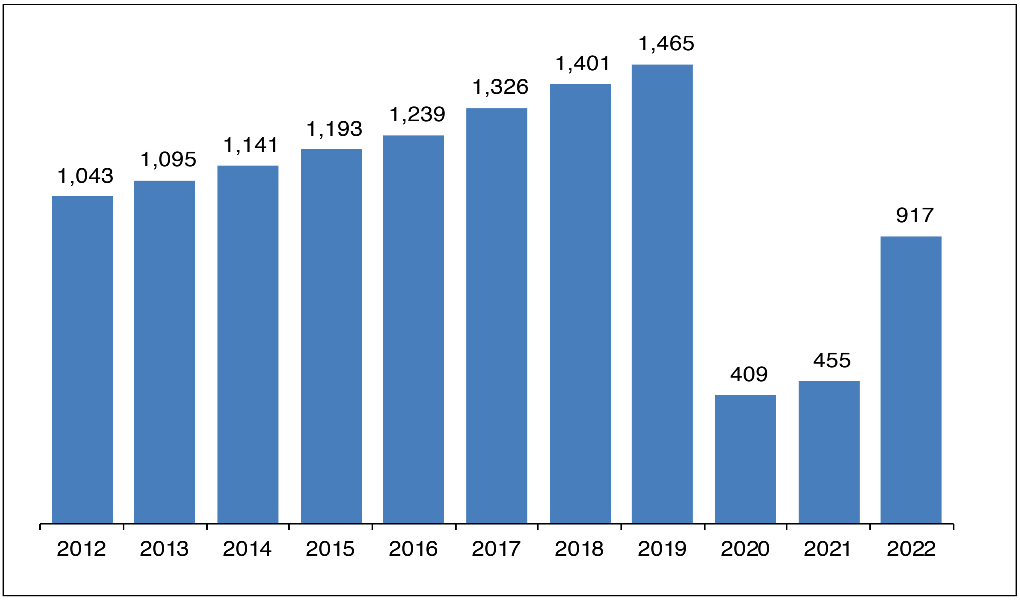
Chapter 1: Recent Developments in the Tourism Industry

1.1 Global Perspective

According to the UNWTO, International tourism saw stronger than expected results in 2022, backed by pent-up demand and the lifting or relaxation of travel restrictions in many countries. Despite headwinds, including the emergence of Omicron at the beginning of the year, the war in Ukraine and climate changes, international tourism showed resilience, as reflected in its strong recovery in arrivals. Over 900 million tourists travelled internationally in 2022, double those in 2021, albeit 37 percent fewer than the pre-pandemic levels (Chart 1.1).

Chart 1.1: Global International Tourist Arrivals, 2012-2022

In Million



Source: UNWTO Barometer 2023 (January issue)

Regional wise, Europe was the largest destination, it recorded 585 million arrivals in 2022, equivalent to 64 percent of the world's share.The Americas received 142 million arrivals accounting for 16 percent, while Africa accounted for less than 5 percent (Table 1.1).

When comparing with pre-pandemic numbers, the Middle East enjoyed the strongest relative increase across regions in 2022, with arrivals rising by 83 percent of the pre-pandemic levels. Africa and the Americas both recovered about 65 percent of its pre-pandemic visitors, while Asia and the Pacific reached only 23 percent, due to stronger pandemic-related restrictions.

Table 1.1: International Tourist Arrivals by Regions, 2018 - 2022

Region	In Million					Comparison with 2021 (%)	Comparison with 2019 (%)
	2018	2019	2020	2021	2022		
World	1,401	1,465	409	455	917	2.0	62.6
Europe	713	745	242	305	585	1.9	78.6
Asia and the Pacific	343	360	59	25	84	3.4	23.5
Americas	217	219	70	81	142	1.7	64.9
Africa	67	69	18	19	45	2.3	65.4
Middle East	64	73	20	25	60	2.4	82.6

Source: UNWTO World Tourism Organization Barometer, January2023

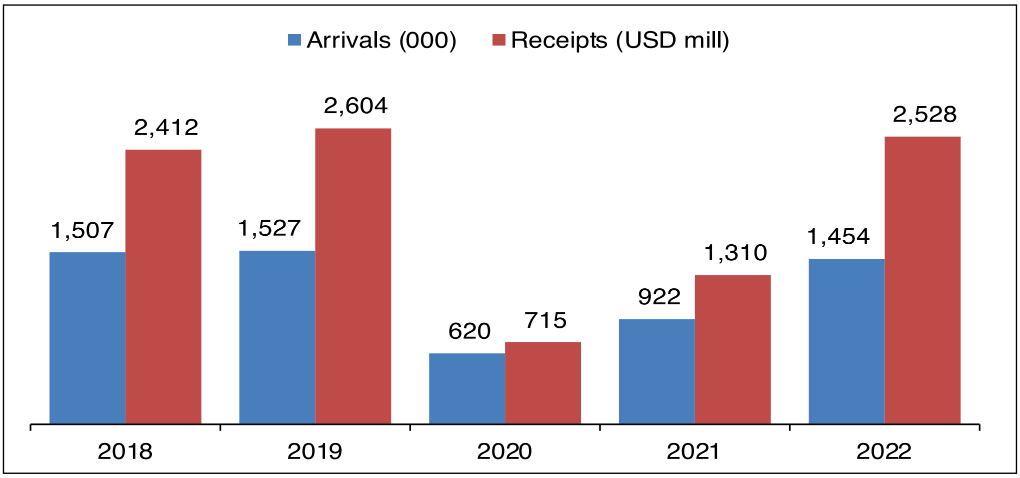
In 2022, a strong rebound in tourism spending was registered, resulting in the recovery of pre-pandemic levels in income across many destinations, in several cases higher than their growth in arrivals. This has been supported by increase in average spending per trip due to longer periods of stay, the willingness by travelers to spend more at destination, and higher travel costs, partly due to inflation. Europe depicted the biggest share of tourism receipts, followed by the Americas, Asia and the Pacific.

1.2 Tanzania's Perspective

1.2.1 Tourism Performance

Despite the global economic shocks, including the residuals of Covid-19 and the war in Ukraine which started early 2022, Tanzania's tourism sector showed high level of resilience, reflected by tourists' arrivals and per capita spending. Measures taken by the governments and the private sector helped to cushion the industry from these adverse effects.The measures include enhancement of products diversification and quality development, coupled with aggressive marketing of Tanzania's unique tourist attractions worldwide, including the Royal Tour. As result, the number of international visitors increased by 57.7 percent to 1,454,920 in 2022, from 922,692 recorded in 2021. Correspondingly, international tourism earnings increased to USD 2,527.8 million in 2022, from USD 1,310.3 million in 2021. Tanzania's international arrivals and earnings for the period 2018-2022 are depicted on (Chart 1.2).

Chart 1.2: International Tourist Arrivals and Earnings, 2018-2022



Recent tourism developments in the United Republic of Tanzania

A number of activities took place in 2022 that have a positive bearing in the tourism industry. The main initiatives include:

i. Tourism Marketing and Promotion

a) Launching of the Royal Tour in America

Tanzania's official tourism and investment promotion campaign, The Royal Tours, which was premiered by Her Excellency President of United Republic of Tanzania,Dr. Samia Suluhu Hassan took place in United States of America, after filmingvarious tourist attractions in Tanzania between August and September 2021.The Royal Tour documentary was launched in New York and Los Angeles on 18th April 2022 and 21st April 2022, respectively. After the premiere in the United States, the Royal Tours was launched in Arusha on 28th April 2023, Zanzibar on 7thMay 2023 and Dar es Salaam on 8thMay 2023. The documentary will be screened in all local and international channels. The airing of this documentary will continue to market the country's tourist attractions worldwide and revive the tourism industry after the aftermath of COVID-19 pandemic. It should be noted that, the choice of the United States to be the first to launch was supported by the fact that the country is among the top five tourist source markets, and that the Americans are usually high spenders, always seeking unique experiences including, trophy hunting and safaris, mountain climbing, and they enjoy sandy beaches.

Her Excellency, Dr. Samia Suluhu Hassan, President of the United Republic of Tanzania, Officially launching the Royal tours in New York, United States of America in April 2022

b) Festival of black arts and culture

His Excellency, Dr. Hussein Ali Mwinyi, the President of the Revolutionary Government of Zanzibar launched the Festival of Black Arts and Culture (FESTAC) 2022 at Verde Hotel. The FESTAC 2022 took place from 22nd to 29th May 2022 and collaboratively organized by the Ministry for Tourism and Heritage and tourism stakeholders in Zanzibar.The festival aims at boosting intra-Africa trade, arts, culture, tourism and travel, literature and poets, music, food, and fashion, as well as other businesses across the continent. FESTAC 2022, was designed to showcase the richness of our continent through a "proudly made in Africa", which extended an invitation to all countries in Africa to participate and showcase what Africa can offer to the rest of the world in terms of culture, history, arts and hospitality— which are important aspects of tourism. The festival was attended by the former Presidents of African nations, Ministers, Ambassadors of foreign missions, women leaders, leaders of tourism organizations, NGOs and other members from the private sectors.

c) Tanzania hosts mega cruise ship

The US based international cruise ship called Zaandam, that carried over 573 crew members and a total of 1,400 tourists, docked at Dar es Salaam and Zanzibar Ports for four days tour in November 2022. While in Tanzania, tourists visited Nyerere National Park, Bagamoyo, Mikumi and Dar es Salaam City in Tanzania Mainland, and Stone Town, Spice Tours, Jozani Forest and Nakupenda Tours in Zanzibar. Hosting huge cruise ships is part of Government's initiatives to develop and promote tourism, as it has a big role to play in raising the number of tourists coming to our country from international markets.

A luxurious Zaandam Cruise ship with tourists on board from the United States of America docks at the Dar es Salaam Port

ii. Meetings and Conferences

The 65th UNWTO CAF Meeting

The United Republic of Tanzania hosted the 65th United Nations World Tourism Organization-Commission for Africa Meeting in Arusha from 5th to 7th October 2022. The theme of the meeting was "Strengthening the resilience of tourism in Africa for inclusive socio-economic development." The meeting was officially opened by the Prime Minister, Honorable Kassim Majaliwa Majaliwa, on behalf of The President of the united Republic of Tanzania, Her Excellency, Dr. Samia Suluhu Hassan, at the Gran Melia Hotel in Arusha. The meeting brought together around 25 Ministers of Tourism and high-level representatives from 35 countries as well as leaders from the private sector. The meeting is an annual event as part of UNWTO's statutory occasions, whereas a country will host this event upon fulfilling the set requirements, which include sustainable and responsible tourism. Apart from attending this meeting, Tanzania organized safaris for delegates to visit various tourism attraction in Arusha in order to make the delegates aware of Tanzania's tourist attractions.

Honourable, Kassim Majaliwa Majaliwa, Prime Minister of the United Republic of Tanzania, at the opening ceremony at Gran Melia Hotel in Arusha

iii. Infrastructure Development

a) Development of high speed internet on Mt. Kilimanjaro

The Minister for Information, Communication, and Information Technology, Honourable Nape Nnauye (MP) on 16th August 2022, led hundreds of tourists to launch high-speed broadband internet at the top of Mount Kilimanjaro, the highest peak in Africa, in order to enable tourists to communicate worldwide. The launching slogan, 'Data Kileleni" intends to further promote Tanzania's iconic Mt. Kilimanjaro visibility globally, as the visitors will be able to keep in touch with the rest of the world on the site.

The Minister for Information, Communication, and Information Technology, Honourable Nape Nnauye, together with other officials and tourists at the peak of Mount Kilimanjaro, during the inauguration ceremony

b) Construction of Msalato International Airport

Msalato International Airport Project is part of the government's priority to relocate administrative functions from the commercial capital in Dar es Salaam to the administrative capital in Dodoma. The new airport aims at enhancing air transport connectivity internally and internationally, and expected to handle approximately 50,000 aircrafts and one million visitors annually. The airport is set to benefit an estimated regional population of more than 200 million people in East Africa and the international trade networks, including business travelers and tourists.The target is to increase business opportunities with other countries in the East African Region, Southern African Development Community (SADC), and the world at large, as well as expanding markets for Tanzania's local products.The occasion was officiated by Her Excellency, Dr. Samia Suluhu Hassan on 30th October 2022 at Msalato, Dodoma.

Her Excellency, Dr. Samia Suluhu Hassan, the President of the United Republic of Tanzania during the official laying of the foundation stone for the Msalato International Airport in Dodoma

c) Construction of a new modern golf course

The Tanzania National Parks Authority has started the construction of a new modern golf course at Fort Ikoma in Serengeti District, Mara Region. The golf course is aimed at promoting the Serengeti National Park by attracting more visitors who can enjoy the Park's scenery while playing golf. Upon the completion of its construction, it is expected to attract about 3,000 golfers annually from various parts of the world, advertise the country's tourism and bring more income from tourism sector.

TANAPA's Board of Trustees Chairman, retired General George Waitara, (right) and TGU chairman Gilman Kasiga during the launching of a modern golf course near Fort Ikoma in Serengeti District, Mara Region

iv. Macroeconomic Condition

The economy has sustained post-COVID-19 recovery over the period 2020-2021 and is projected to converge to a decadal pre-crisis growth. However, in 2022, growth was undermined by spillover effects of the war in Ukraine, which include high import prices, high cost of borrowing in the external markets due to hiking of the fed rate, and low foreign exchange liquidity in the market. In support of the economy, the Bank of Tanzania took measures that led to increased private sector investment and production in minerals (especially coal), manufacturing and agriculture.The Government also took several measures to reduce the impact of global effects, including tax relief in various forms, provision of subsidies to petroleum products and fertilizers, and increased budget for agriculture. In 2022, it is likely that the growth projection of 4.7 percent for 2022 or higher, will be attained.CPI inflation trended upward in 2022, largely due to high import prices of consumer goods, expectations about decline in food supply due to delays of short rains and increase in demand for food from neighbouring countries. However, the pace of increase was moderate, due to adequate food in most parts of the country, stable exchange rate, as well as prudent monetary policy of reducing the speed of increase in liquidity and fiscal policy (such as provision of subsidies and tax relief). The level of CPI inflation reached its peak of 4.9 percent in November 2022, before easing to 4.8 percent in December 2022. These levels were below the target of 5.4 percent for 2022/23 and lower compared to most of our peers in EAC and SADC. In 2023, growth is expected to be more than 5 percent, precisely at 5.2 percent, but may be higher if the global shocks moderate fast.

In 2023, growth is expected to be more than 5 percent, precisely at 5.2 percent, but may be higher if the global shocks moderate fast. The growth is expected to be reinforced by public investment, the private sector investment (as evidenced by strong growth of credit to the private sector) and rebound in tourism. The government is determined to continue improving the business environment to promote the private sector participation in facilitating economic growth, employment, and poverty reduction.

Apart from these initiatives, destination Tanzania received various awards in 2022 in recognition of the outstanding performance in the tourism industry. The awards include:

i. The best tour guide of 2022

In 2022, the President of the United Republic of Tanzania, Her Excellency, Dr. Samia Suluhu Hassan was ranked among the 100 most influential women in the world and awarded the best tour guide in Tanzania by the International Institute of International Iconic Awards.[1] The award has recognized Her Excellency as the best tour guide through the film 'The Royal Tour'. In addition, TANAPA and Payne Africa awarded Her Excellency, Dr. Samia Suluhu Hassan, in recognizing the outstanding contribution of Royal Tour for sector development in Tanzania. These awards were presented to the Minister for Natural Resources and Tourism, Dr. Pindi Chana on behalf of the President of the United Republic of Tanzania, Her Excellency Dr. Samia Suluhu Hassan on three different occasions held in Dodoma.

The Minister of Natural Resources and Tourism, Dr Pindi Chana accepts the awards on behalf of Her Excellency, The President of United Republic of Tanzania, Dr Samia Suluhu Hassan

ii. The best tourism boards in Africa

Zanzibar Commission for Tourism won the Payne Africa awards for best tourism 2022 in the Best African Tourism Board Category. Meanwhile for the first time Tanzania Tourist Board emerged as Africa's leading Tourist Board in the World Travel awards 2022. The awards recognize the highest standards of excellence and strong support in marketing and development of the country's tourism resources and services. These awards were presented to Mr Rahim Mohamed Bhaloo, the Chairperson of Zanzibar Commission for Tourism and Dr. Benson Bana, the Ambassador of Tanzania to Nigeria at the Eco Hotel in Lagos, Nigeria on 12 September 2022.

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1 International Institute of International Iconic Awards is an India based company, which focuses on conserving the environment, film industry and engages in the business of tourism.

The Chairperson of Zanzibar Commission for Tourism, Mr. Rahim Mohammed Bhaloo and Ambassador of Tanzania to Nigeria Dr. Benson Bana receiving Pyne Awards in Abuja, Nigeria

iii. World Travel Awards 2022

Serengeti National Park is undoubtedly the bestknown wildlife sanctuary in the world. Unsurpassed for its natural beauty and scientific value, it has the greatest concentration of plains game in Africa. The Serengeti National Park in Tanzania is home to the greatest wildlife spectacle on earth - the great migration of wildebeest and zebra. Serengeti has once more bagged the top “Africans Leading National Park 2022”, award, four years in a row. Meanwhile Zanzibar was also named the leading beach destination in Africa in 2022 by the World Travel awards, beating a host of other popular places such as Cape Town and Sharm El Sheik in Egypt. Serengeti National Park and Zanzibar were declared winner in World Travel Awards results for the African continent announced during the WTA Gala held in Nairobi, Kenya on 17^{th} October 2022.

The Serengeti National Park and Zanzibar White Sand Beach

Chapter 2: Results of the Visitors' Exit Survey

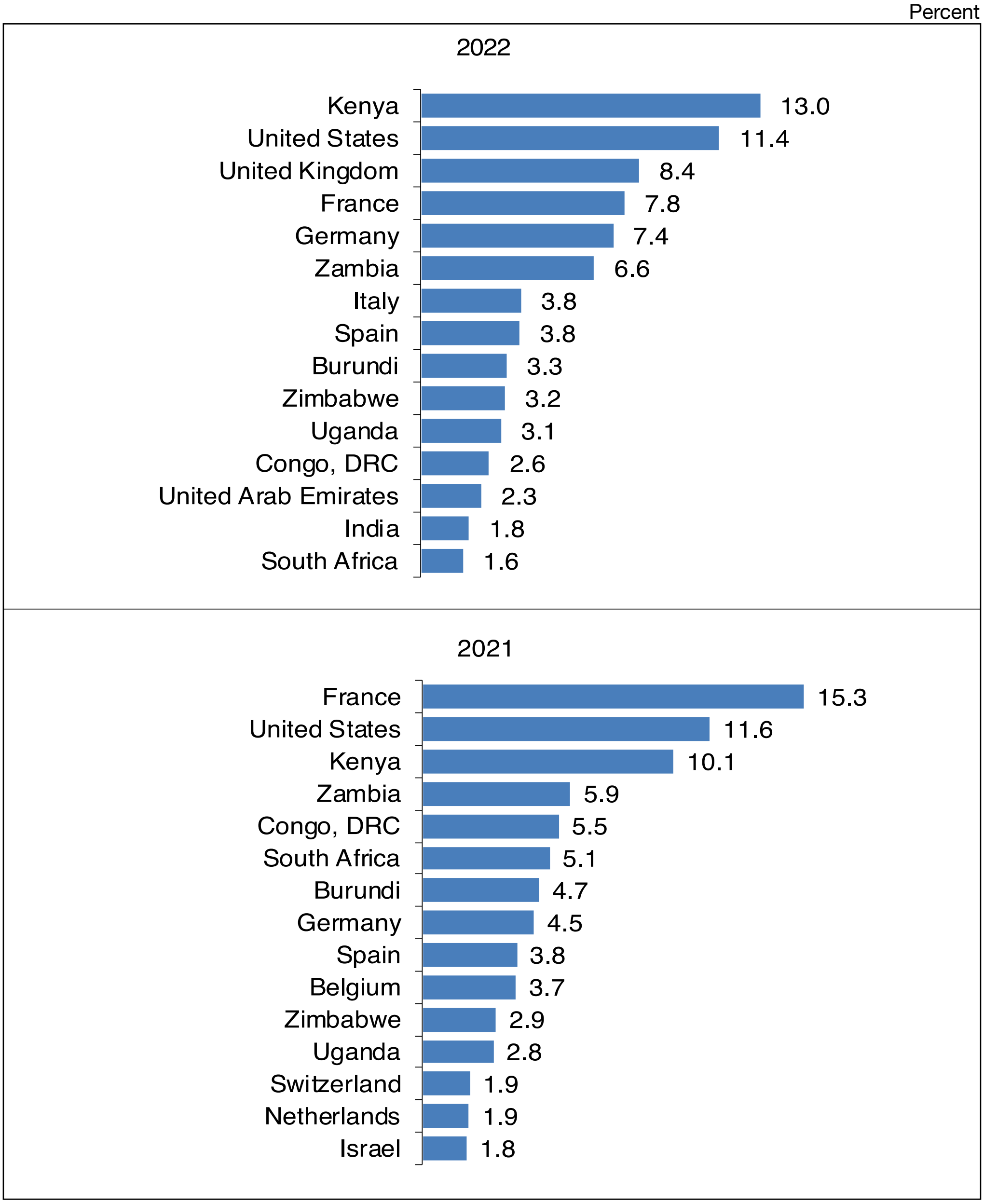
2.1 Introduction

This chapter provides the results of the International Visitors' Exit survey conducted in 2022 at the time of the tourist peak season. It highlights the key aspects that are of interest to policy makers such as tourist source markets, purposes of visit, travel arrangements, length of stay and expenditure pattern. In addition, visitors' feedback on their experience while in Tanzania and areas that need improvement are also discussed. The survey collected information from 11,849 visitors representing 118 countries globally.

2.2 Source Markets

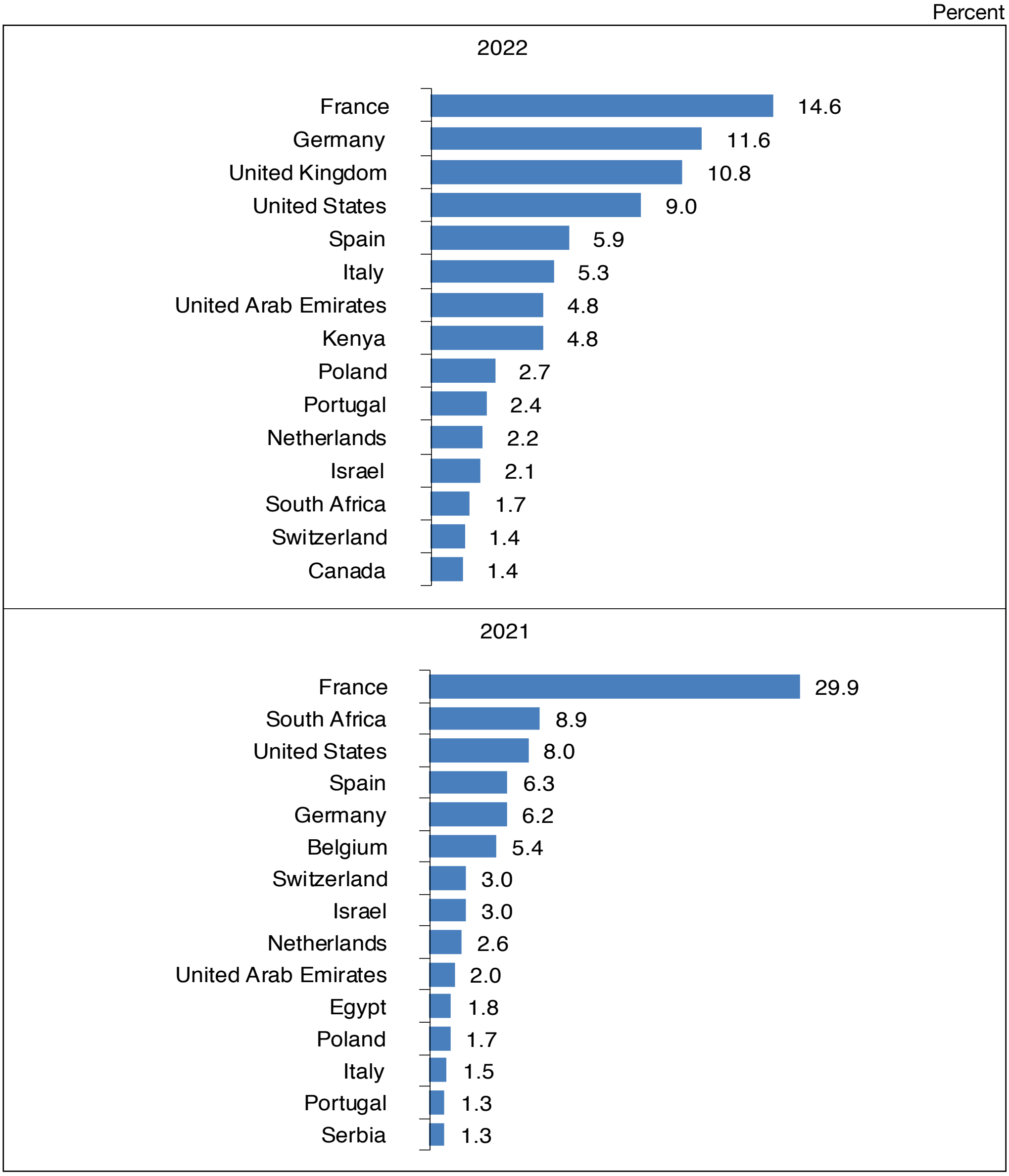
The analysis focuses on top 15 source markets, which represent more than 80 percent of the total visitors. The leading top source markets to Tanzania were Kenya, United States of America and United Kingdom. For more than a decade Kenya, the United States of America, the United Kingdom, France, Germany and Zambia remained the main traditional source markets for Tanzania. Italy, the United Arab Emirates, and India were the new entrants to the top 15 source markets in 2022, replacing Belgium, Switzerland and the Netherlands (Chart 2.1). Noteworthy, the source markets remained broadly the same, only there have been a shift of rankings largely explained by lifting up of travel restrictions by most long-haul destinations in 2022 when compared to 2021.

Chart 2.1: Top 15 Source Markets for the URT



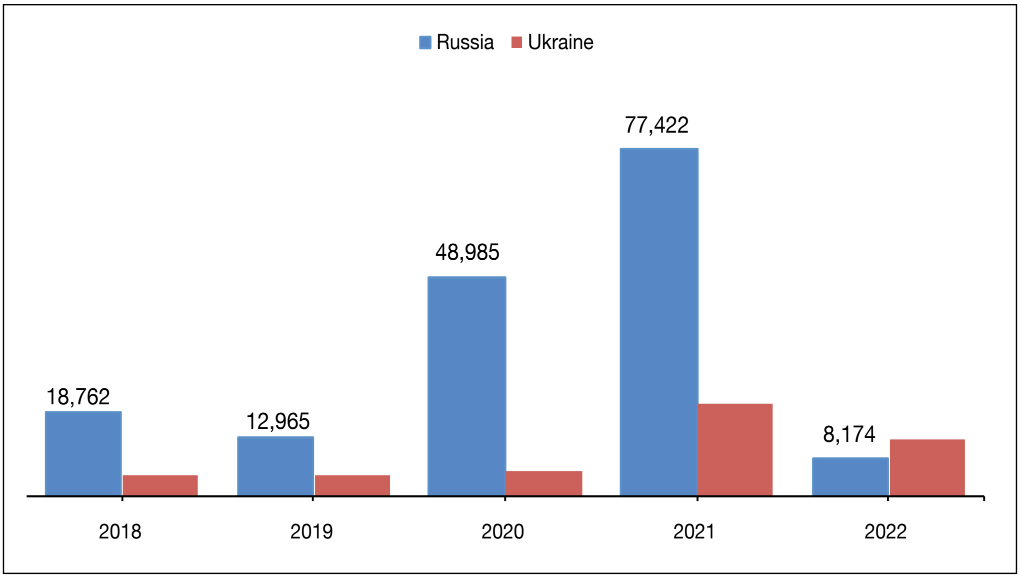
In Zanzibar, the top 15 source markets accounted for 81.0 percent with France topping the list of source markets, followed by Germany and the United Kingdom (Chart 2.2). In the past three years, France remained the major source market for Zanzibar replacing Italy, which was the leading source market before the outbreak of COVID-19.

Chart 2.2: Top 15 Source Markets for Zanzibar



The available Immigration data reveals that the number of tourist arrivals from Russia and Ukraine has increased to 98,158 in 2021, from 54,800 in 2020. However, in 2022, the number of tourists from Russia dropped sharply by 89.0 percent to 8,174, from 77,422 in 2021. Similarly, in Ukraine, the number of tourists declined by 37.8 percent to 12,890 tourists in 2022 compared with 20,736 recorded in 2021. This trend is partly explained by the ongoing war in Ukraine, which started in 2022 (Chart 2.3).

Chart 2.3: Trend of tourist arrivals from Russia and Ukraine from 2018 – 2022



Source:Immigration Services Department

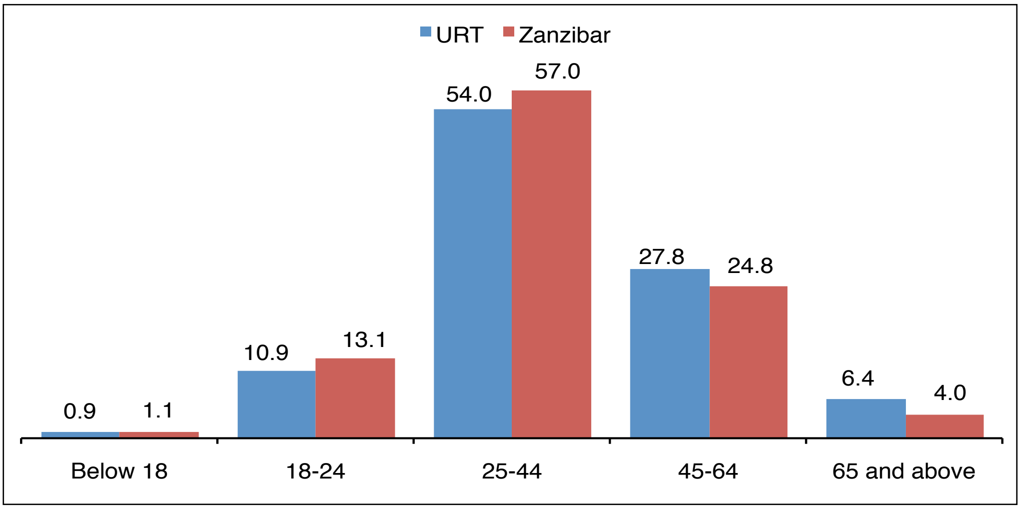
2.3 Age Group

More than half of visitors to URT were aged between 25-44 years. Visitors aged between 45-64 years were the second in prominence, followed by youths who are under the age group of 18-24. Similar pattern was also observed in the previous surveys. The share of senior visitors aged 65 and above continued to remain minimal, despite having ample time and financial resources.

In Zanzibar, the pattern remained similar to the results recorded in previous surveys. Visitors aged between 25-64 years accounted for a lion's share of more than 80 percent. The share of senior citizens remained low, as in the case for URT. A joint effort among tourism industry players is important to explore this potential market due to its significance in the economy (Chart 2.4).

Chart 2.4: Distribution of Visitors by Age Group

Percent



In URT, visitors aged between 25 and 64 years, mainly came from France, the United States of America and Kenya. More than half of the elderly visitors came from the United States of America, followed by France (Table 2.1).

Table 2.1: Age Group by Top 15 Source Markets, URT

Percent

	Age group					
Country of residence	Below 18	18-24	25-44	45-64	65 and above	Total
Kenya	4.6	12.5	54.5	26.2	2.3	100.0
United States	3.1	6.8	36.8	26.2	27.1	100.0
United Kingdom	9.2	15.6	42.5	27.5	5.2	100.0
France	3.3	14.4	60.2	19.5	2.6	100.0
Germany	10.1	15.9	39.2	30.3	4.5	100.0
Zambia	1.7	4.6	65.0	27.5	1.3	100.0
Italy	9.1	11.5	48.6	24.9	6.0	100.0
Spain	6.0	14.3	50.9	26.3	2.5	100.0
Burundi	4.4	11.6	50.1	30.6	3.3	100.0
Zimbabwe	0.5	5.3	75.8	18.4	0.0	100.0
Uganda	2.5	16.8	62.3	16.8	1.7	100.0
Congo, DRC	1.9	5.2	60.6	30.3	1.9	100.0
United Arab Emirates	5.5	7.4	64.7	19.5	2.9	100.0
India	2.8	9.2	48.4	31.8	7.8	100.0
South Africa	3.2	5.8	46.6	36.5	7.9	100.0

In Zanzibar, visitors in the age group of 25-44 mainly came from France and Spain, while those in the age of 45-64 mainly came from France, South Africa and Germany (Table 2.2).

Table 2.2: Age Group by Top 15 Source Markets, Zanzibar

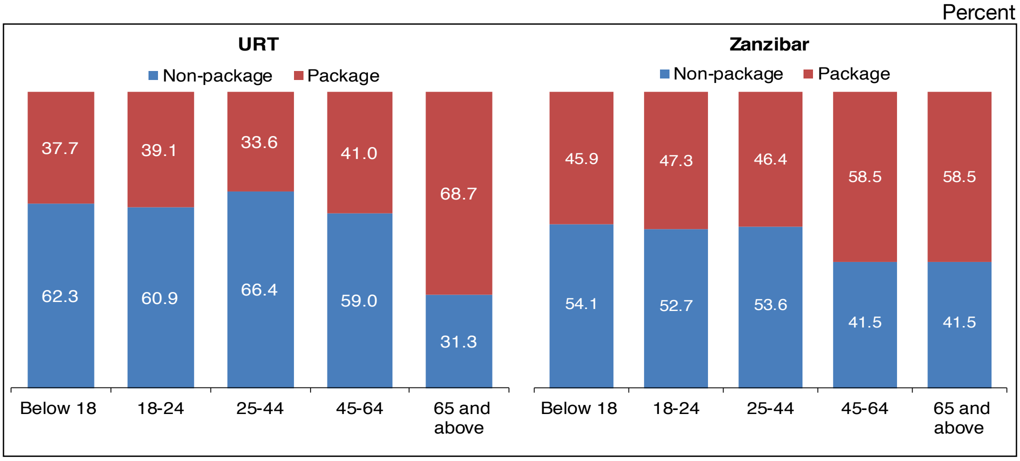
Percent

Country of residence	Age group: Below 18	18-24	25-44	45-64	65 and above	Total
France	3.2	14.6	61.3	18.5	2.4	100.0
Germany	11.0	16.3	43.7	25.9	3.1	100.0
United Kingdom	12.6	13.7	43.6	26.0	4.0	100.0
United States	4.4	7.5	52.0	23.3	12.8	100.0
Spain	4.7	14.3	53.7	25.7	1.7	100.0
Italy	6.4	8.6	55.8	27.0	2.2	100.0
United Arab Emirates	6.1	7.4	63.9	20.1	2.5	100.0
Kenya	5.8	9.1	59.8	22.4	2.9	100.0
Poland	10.2	8.8	47.4	29.9	3.6	100.0
Portugal	8.3	13.3	37.5	37.5	3.3	100.0
Netherlands	9.8	14.3	59.8	12.5	3.6	100.0
Israel	10.3	22.4	37.4	29.0	0.9	100.0
South Africa	5.8	3.5	52.3	36.0	2.3	100.0
Switzerland	2.9	15.7	50.0	21.4	10.0	100.0
Canada	20.3	15.9	29.0	31.9	2.9	100.0

Survey findings revealed that visitors to URT in all age groups mainly came under the non-package tour arrangement except senior citizen. For Zanzibar, the majority of visitors up to the 44 years of age used the non-package tour arrangement, while those aged 65 years and above used the package tour arrangement (Chart 2.5). This signifies that elderly visitors have higher preference for organized package tour. In this regard, attention should be given to put in place infrastructure that can support elderly tourists.

Chart 2.5: Age Group by Tour Arrangement

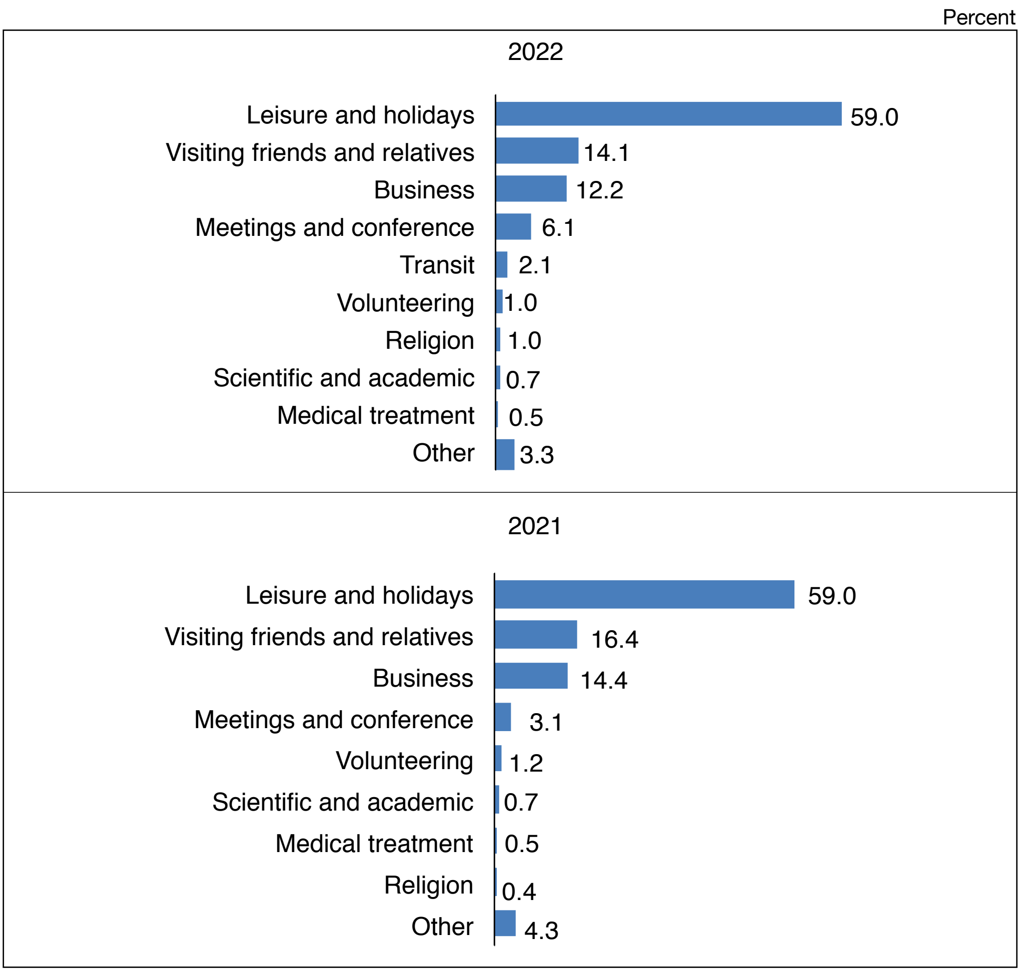
Percent



2.4 Purpose of Visit

The primary purposes of visit include leisure and holidays, visiting friends and relatives and business. The majority of visitors to URT (59 percent) came for leisure and holidays, reflecting the country's endowment with natural and cultural attractions. Tourists visiting friends and relatives were second in prominance, followed by those who came for business. The prominance of business visitors is a reflection of increasing trade and investment opportunities in Tanzania (Chart 2.6). The percentage of visitors coming for medical treatment is quite small. This is an area that needs more promotion given that Tanzania has significant potential for medical tourism, given its geographical location; and availability of affordable and quality medical facilities.

Chart 2.6: Purpose of Visit, URT



Majority of leisure and holiday visitors were from the United States of America, France, the United Kingdom and Germany. This indicates that Tanzania is a popular destination for tourists from Europe and America. Visitors from Kenya and Burundi mainly came to visit friends and relatives while most business visitors were from Zambia and Zimbabwe.

Table 2.3: Purpose of Visit of Top 15 Source Markets, URT

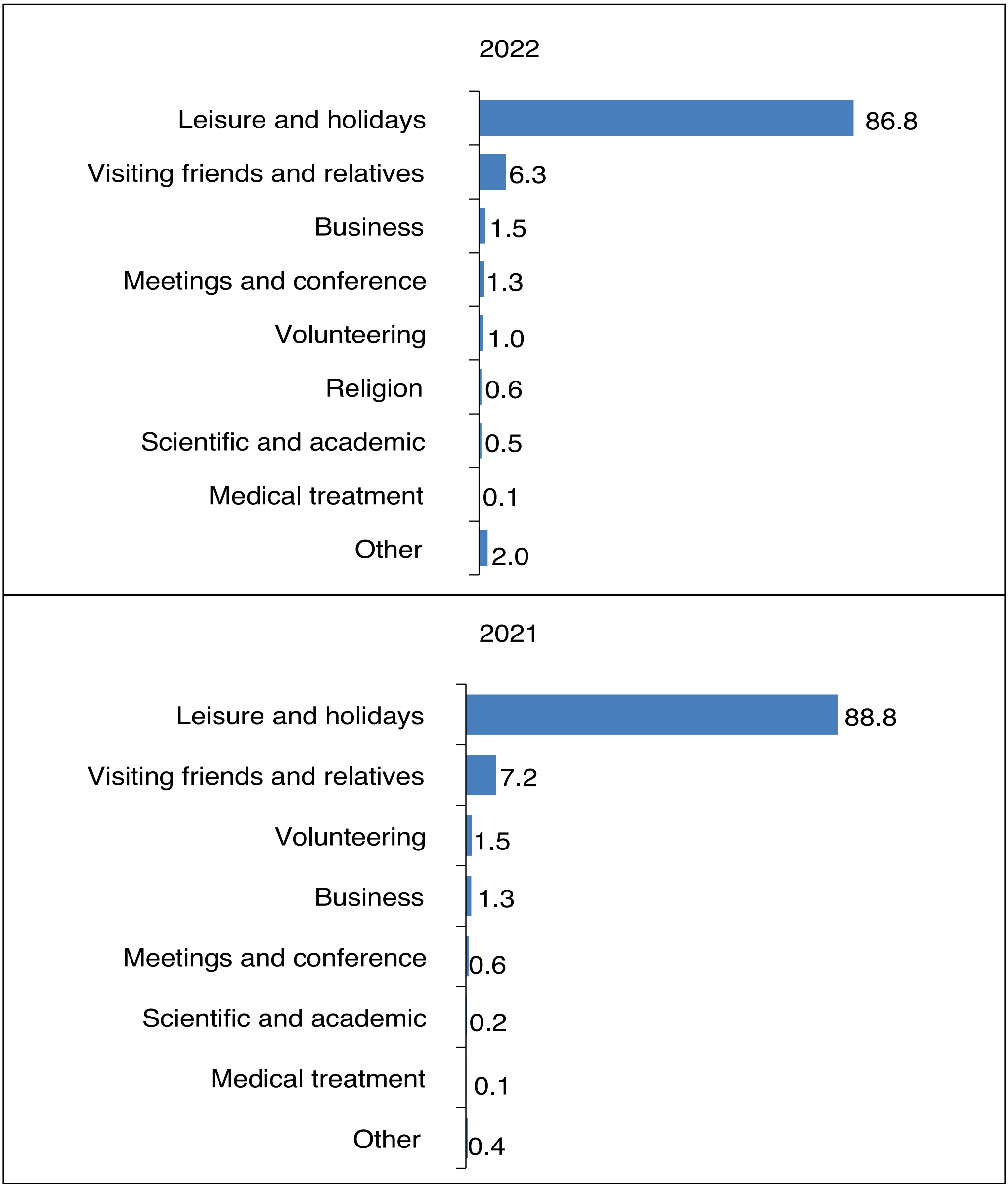
Percent

	Purpose of visit									
	Business	Leisure and holidays	Medical treatment	Meetings and Conference	Religion	Scientific and Academic	Transit	Visiting friends and relatives	Volunteering	Other
Kenya	10.4	5.8	41.9	42.2	38.1	53.6	42.2	39.2	1.3	29.1
United States of America	0.7	23.2	2.3	3.6	4.4	5.4	0.9	4.3	21.5	4.4
United Kingdom	0.9	13.8	0.0	15.0	0.9	12.5	0.9	9.3	7.6	5.3
France	0.4	15.9	4.7	0.7	1.8	3.6	0.4	2.9	10.1	6.6
Germany	0.1	13.5	0.0	1.2	19.5	8.9	0.9	6.1	27.8	4.1
Zambia	45.3	0.8	0.0	2.3	0.0	5.4	4.0	4.2	1.3	12.5
Italy	0.1	7.7	0.0	0.5	0.0	5.4	1.3	0.8	20.3	2.5
Spain	0.1	7.7	0.0	0.2	8.0	0.0	0.0	0.8	10.1	2.8
Burundi	2.6	0.4	34.9	3.6	5.3	0.0	23.1	14.2	0.0	10.3
Zimbabwe	19.6	1.1	4.7	1.8	1.8	0.0	4.0	1.5	0.0	3.8
Uganda	3.4	0.8	7.0	17.6	12.4	3.6	12.0	6.1	0.0	12.8
Congo, DRC	10.5	0.5	4.7	2.1	4.4	0.0	8.4	6.3	0.0	3.4
United Arab Emirates	0.4	4.7	0.0	0.7	0.0	0.0	0.0	0.8	0.0	0.3
India	3.2	2.1	0.0	4.3	3.5	0.0	0.0	2.1	0.0	1.6
South Africa	2.1	2.1	0.0	4.1	0.0	1.8	1.8	1.3	0.0	0.6
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

In Zanzibar, the majority of visitors came for leisure and holidays, followed by those visiting friends and relatives. Visitors coming for business and conference were the least (Chart 2.7).

Chart 2.7: Purpose of Visit, Zanzibar

Percent



The distribution of the top 15 source markets in Zanzibar, indicates that the majority of leisure and holiday visitors were from France, Germany, the United Kingdom and the United States of America. The majority of business visitors to Zanzibar came from Kenya and South Africa, while those who came to visit friends and relatives were from the United Kingdom and Germany (Table 2.4).

Table 2.4: Purpose of Visit of Top 15 Source Markets, Zanzibar

Percent

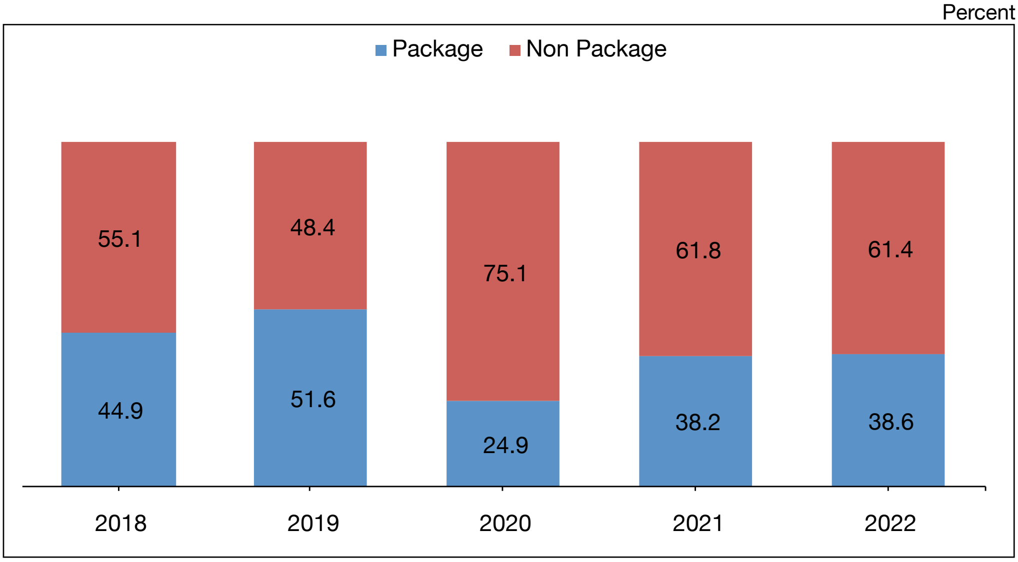
	Purpose of visit									
	Business	Leisure and holidays	Medical treatment	Meetings and Conference	Religion	Scientific and Academic	Transit	Visiting friends and relatives	Volunteering	Other
France	5.3	19.0	0.0	0.0	7.7	0.0	0.0	11.6	10.8	24.7
Germany	2.6	13.7	0.0	11.6	84.6	30.0	0.0	17.3	37.8	8.6
United Kingdom	10.5	12.4	0.0	14.0	0.0	50.0	0.0	29.7	8.1	8.6
United States of America	10.5	11.9	0.0	4.7	0.0	0.0	0.0	6.8	5.4	4.9
Spain	2.6	7.7	0.0	0.0	0.0	0.0	0.0	2.8	13.5	9.9
Italy	0.0	7.0	0.0	2.3	0.0	10.0	0.0	1.2	5.4	8.6
United Arab Emirates	0.0	6.5	0.0	0.0	0.0	0.0	0.0	2.8	0.0	1.2
Kenya	47.4	4.4	100.0	55.8	0.0	10.0	0.0	13.7	0.0	7.4
Poland	0.0	3.4	0.0	2.3	0.0	0.0	0.0	2.4	5.4	7.4
Portugal	0.0	3.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.9
Netherlands	2.6	2.9	0.0	0.0	7.7	0.0	0.0	0.8	5.4	0.0
Israel	0.0	2.7	0.0	4.7	0.0	0.0	0.0	1.2	2.7	3.7
South Africa	13.2	2.0	0.0	4.7	0.0	0.0	0.0	2.4	0.0	1.2
Switzerland	5.3	1.5	0.0	0.0	0.0	0.0	0.0	5.2	5.4	1.2
Canada	0.0	1.7	0.0	0.0	0.0	0.0	0.0	2.0	0.0	2.5
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

2.5 Tour Arrangement

The majority of visitors in the last five years used the non-package tour arrangement except in 2019. The number of visitors who came under the non-package tour remained about 61 percent for two consecutive years from 2021 to 2022. Most of the visitors from long haul destinations preferred the package tour arrangement (Chart 2.8).

Chart 2.8: Visitors by Tour Arrangement, URT

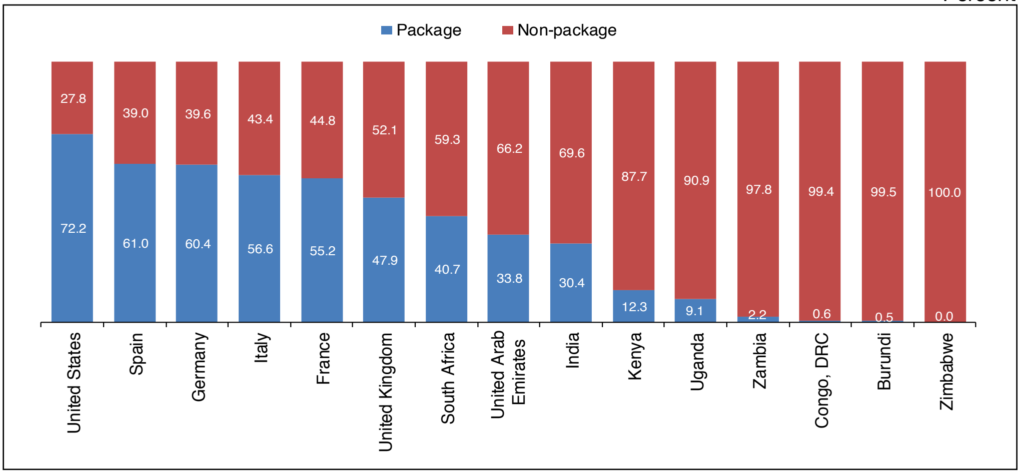
Percent



Largest proportion of visitors who travelled under the package tour arrangement came from the United States of America, followed by Germany and France. Just like in previous surveys, visitors from neighboring countries had the lowest share of package tour visitors; this could be explained by close proximity and family ties (Chart 2.9).

Chart 2.9: Top 15 Source Markets by Tour Arrangement, URT

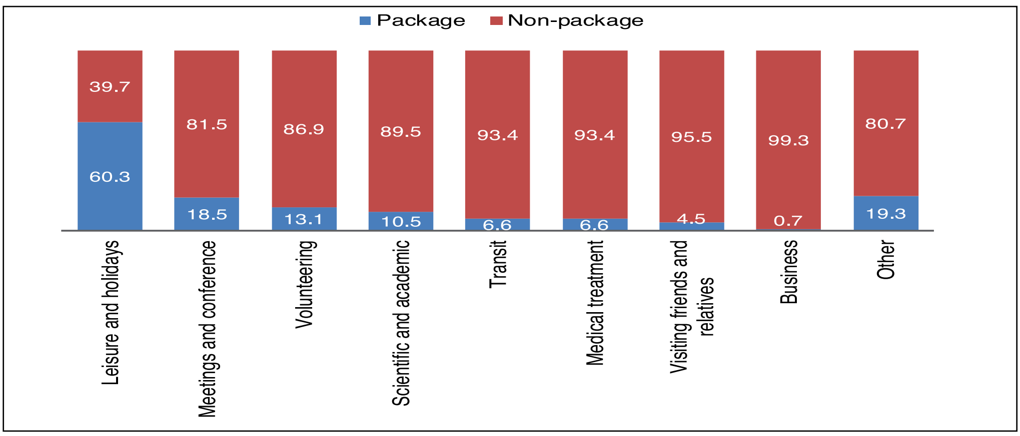
Percent



Survey finding indicates that about 60 percent of leisure and holidays visitors came under the package tour arrangement, which can be partly explained by the unfamiliarity of the destination.Visitors who came for business and visiting friends and relatives preferred the non-package tour arrangement (Chart 2.10).

Chart 2.10: Travel arrangement by purpose of visit, URT

Percent



In Zanzibar, 52.5 percent of visitors came under the package tour arrangement, with the leading source market being Poland, followed by Germany and Switzerland (Chart 2.11). This could be explained by increased number of direct charter flights from the European markets. Under the non-package tour arrangement, Kenya and the United Arab Emirates took the lead**,** indicating familiarity of the destination. With the exception of 2020, most of visitors to Zanzibar, came under the package tour arrangement (Chart 2.12).

Chart 2.11: Top 15 Source Markets by Travel Arrangement, Zanzibar

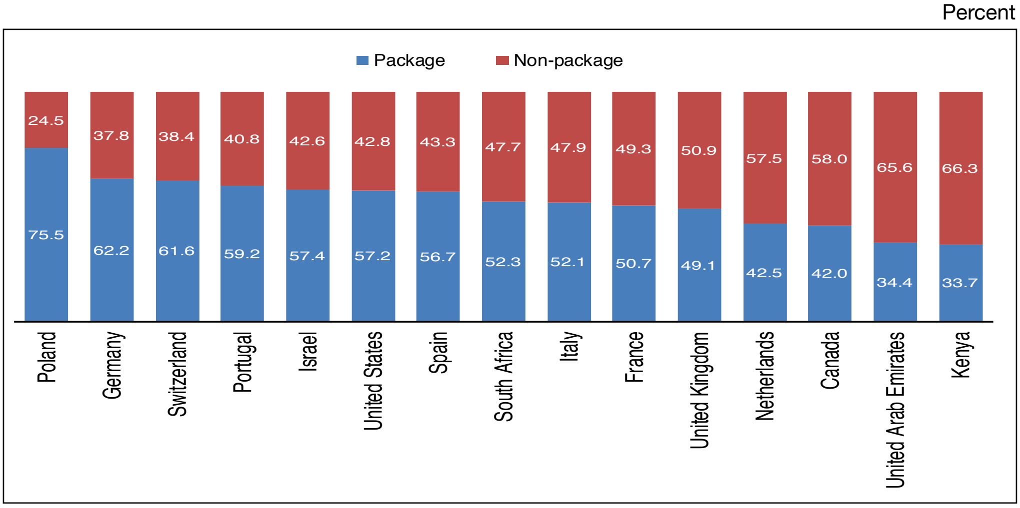
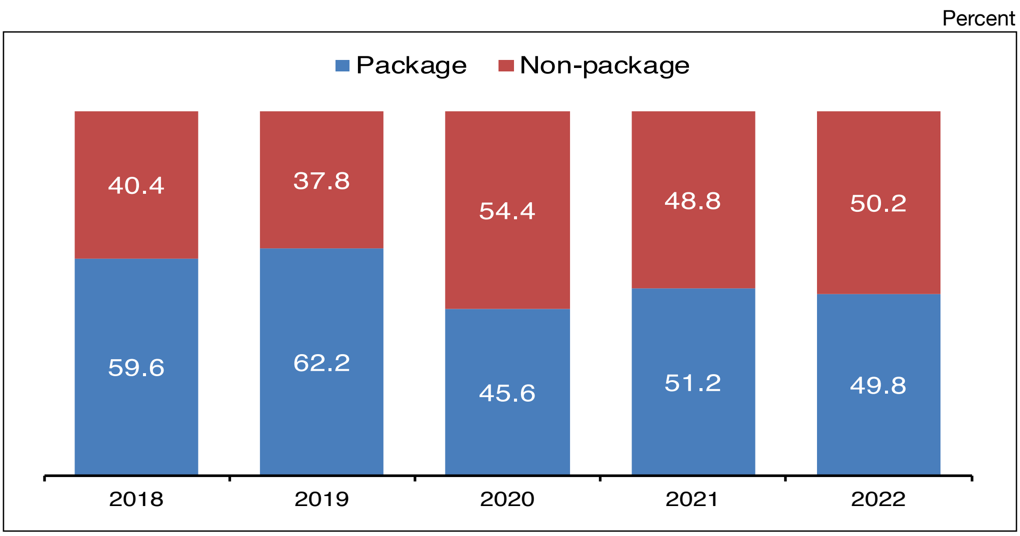


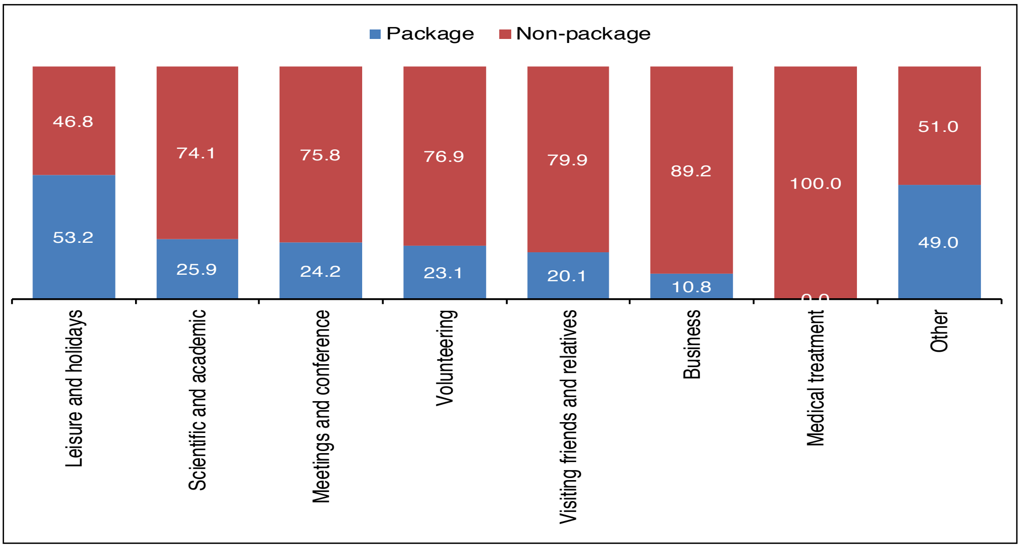
Chart 2.12: Visitors by Tour Arrangement, Zanzibar



In Zanzibar, visitors who came under the non-package tour dominated in all purposes except those who came for leisure and holidays (Chart 2.13).

Chart 2.13: Travel Arrangement by Purpose of Visit, Zanzibar

Percent



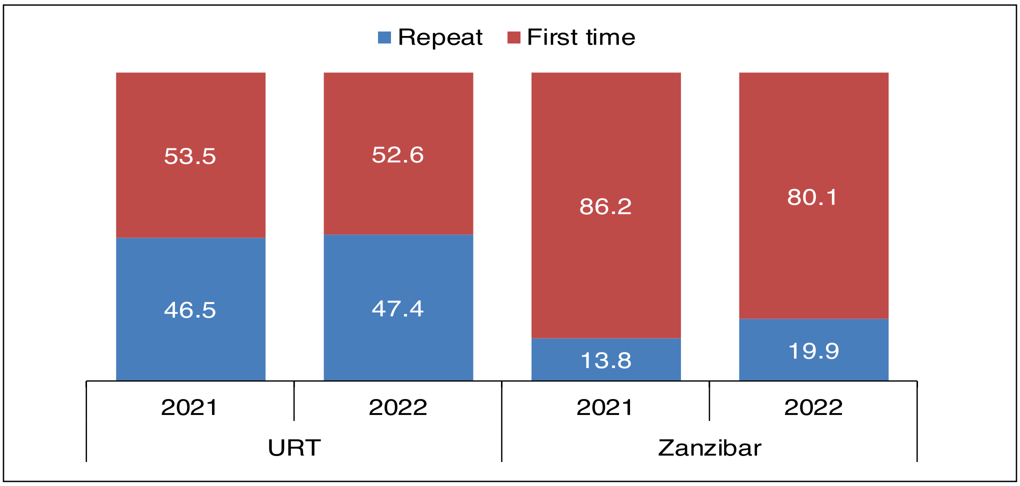
Overall, the data suggest that visitors from different countries have varying preferences when it comes to travel arrangements, and that these preferences may be influenced by factors such as proximity, culture, values, and individual needs. By understanding these patterns, tour operators/travel agents can better tailor their services to the specific needs and preferences of visitors from different countries, ensuring more positive and enjoyable travel experiences.

2.6 First-time and Repeat Visits

In URT, 52.6 percent of the interviewed visitors in 2022, were first -timers compared with 53.5 percent in 2021, while in Zanzibar, 80.1 percent of visitors came for the first time compared with 86.2 percent (Chart 2.14).

Chart 2.14: First-time and Repeat Visitors

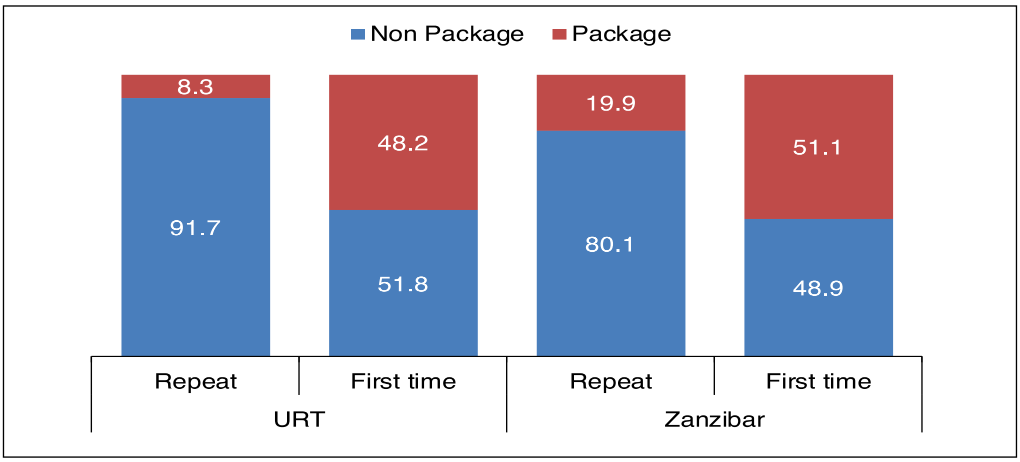
Percent



In 2022, repeat visitors both in URT and Zanzibar, mostly used the non-package tour arrangement. First-time visitors to URT preferred the non-package tour arrangement, while those for Zanzibar preferred the package tour arrangement (Chart 2.15).

Chart 2.15: First-time and Repeat Visitors by Tour Arrangement

Percent



Majority of first-time visitors to the United Republic of Tanzania were from France, Spain and the United States of America. Meanwhile, visitors from the neighbouring countries such as Uganda, Zimbabwe, Kenya, Zambia, DRC, and Burundi, took the lead in bringing repeat visitors because of proximity, good business relations and family ties with Tanzania (Chart 2.16). Majority of first-time visitors mainly came for leisure and holidays, while repeat visitors came for business and visiting friends and relatives (Table 2.5).

Chart 2.16: First-time and Repeat Visitors by Top 15 Source Markets, URT

Percent

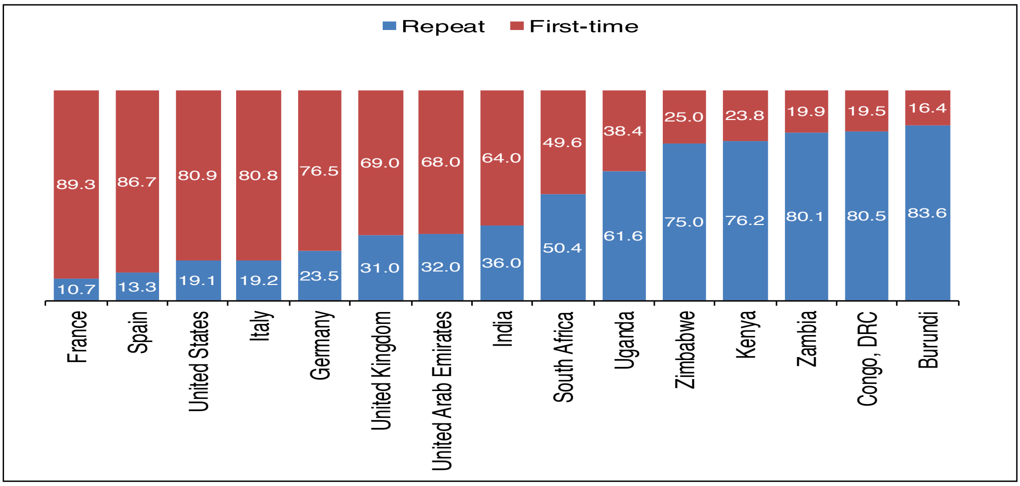


Table 2.5: First-time Visitors and Repeat Visitors by Purpose of Visit, URT

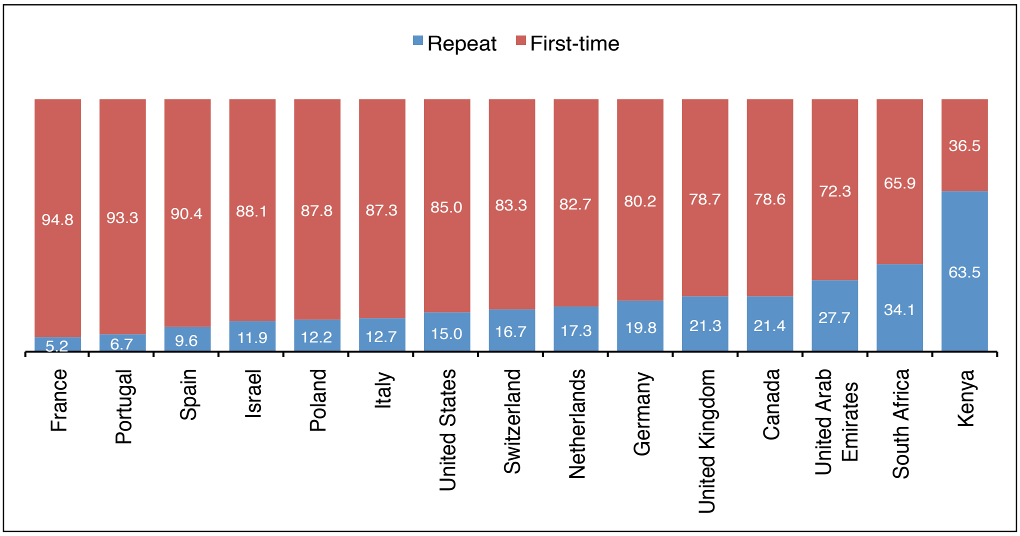
Percent

Purpose of visit	Repeat visitors	First-time visitors
Business	29.4	7.4
Leisure and holidays	18.5	71.1
Medical treatment	0.9	0.3
Meetings and conference	9.4	7.0
Religion	1.3	0.7
Scientific and academic	1.0	0.8
Transit	4.3	1.7
Visiting friends and relatives	29.3	6.6
Volunteering	0.7	1.6
Other	5.0	2.7
Total	100.0	100.0

In Zanzibar, the highest proportion of first-time visitors to Zanzibar came from France, Portugal, Spain, Israel, and Poland, while repeat visitors came from Kenya (Chart 2.17).

Chart 2.17: First-time and Repeat Visitors by Top 15 Source Markets, Zanzibar

Percent



In Zanzibar, most of both first-time and repeat visitors came for leisure and holidays as well as visiting friends and relatives (Table 2.6).

Table 2.6: First-time Visitors and Repeat Visitors by Purpose of Visit, Zanzibar

Percent

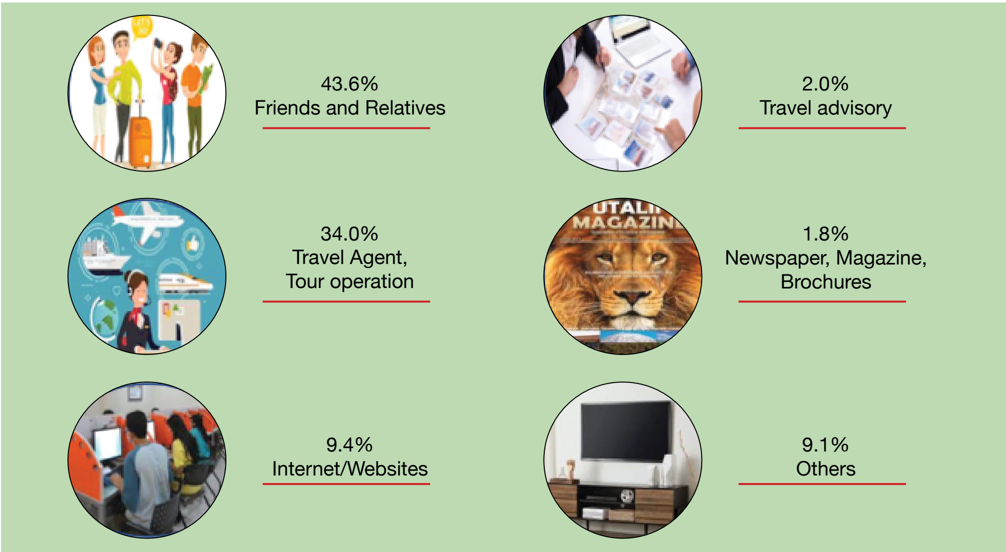
Purpose of visit	Repeat visitors	First-time visitors
Business	6.9	1.2
Leisure and holidays	59.7	89.5
Medical treatment	0.5	0.1
Meetings and conference	5.3	1.4
Religion	0.2	0.3
Scientific and academic	0.5	0.5
Visiting friends and relatives	22.0	3.4
Volunteering	1.4	1.6
Other	3.7	2.1
Total	100.0	100.0

2.7 Source of Information

More than one-third of visitors heard about Tanzania through friends and relatives, followed by tour operators and travel agents. In addition, some visitors heard about Tanzanian attractions through Royal tour documentary, trade fairs, TV networks and Tanzania missions abroad (Chart 2.18). More efforts are needed to promote tourism attractions through digital marketing, tourism exhibitions and trade fairs.

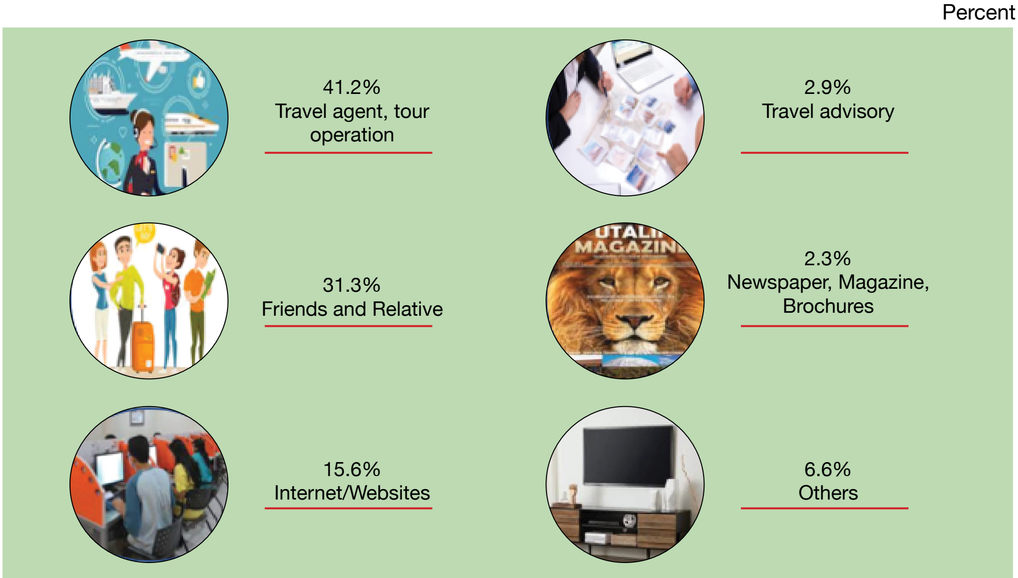
Chart 2.18: Source of Information about Destination Tanzania

Percent



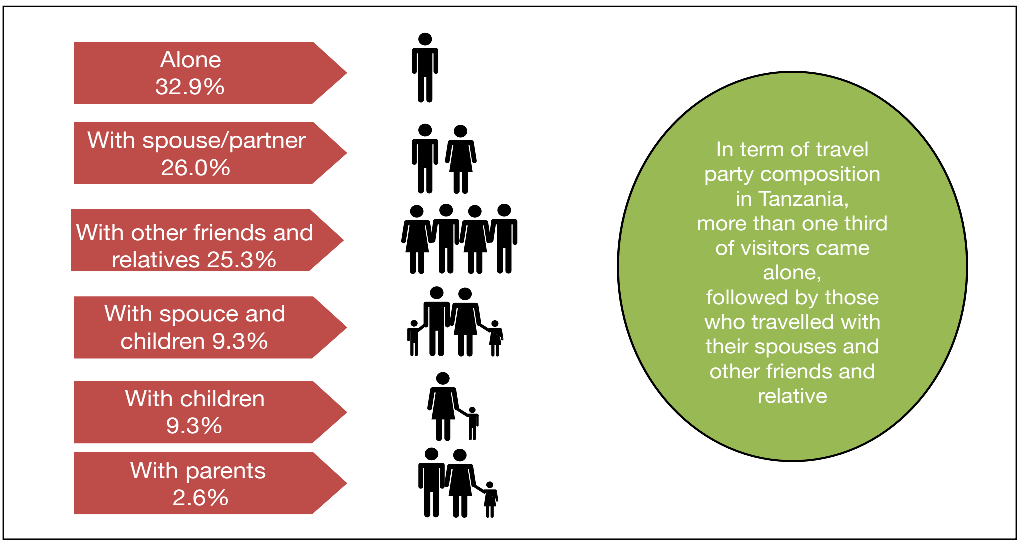
In Zanzibar, about 41.2 percent of visitors heard about Tanzania from tour operators and travel agents, followed by those who heard from friends and relatives. Internet was also a mojor source of information about Tanzanian attractions (Chart 2.19).

Chart 2.19: Source of Information, Zanzibar



Travel Party

Chart 2.20: Travel party, URT



The trend of travel party from 2018 to 2022 shows that, the majority of visitors came alone, followed by those who came with their spouses and other friends and relatives. Visitors who came with their parents were the least in all years (Table 2.7).

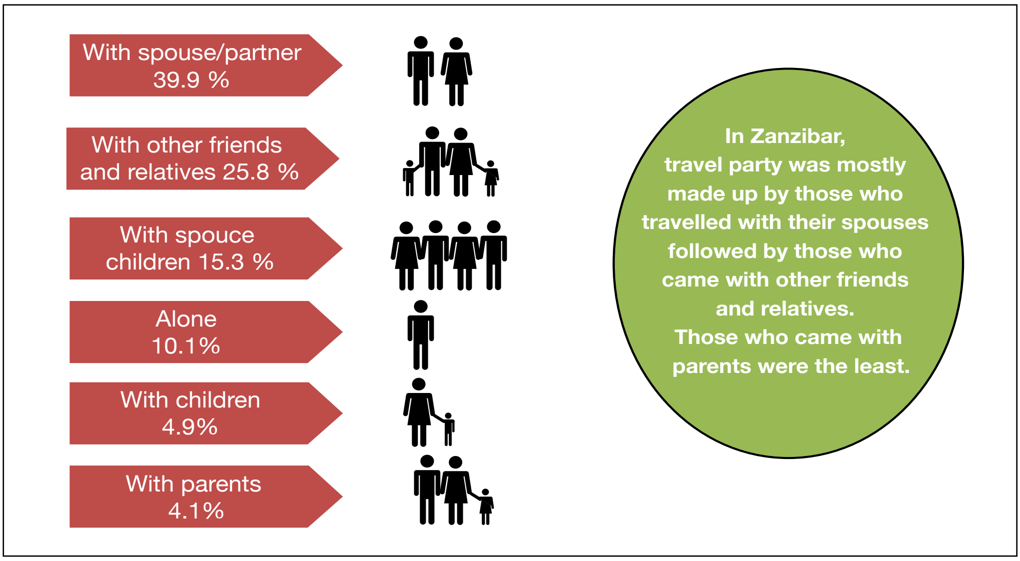
Table 2.7:Travel Party, URT 2018 – 2022

Percent

Travel Party	2018	2019	2020	2021	2022
Alone	58.0	52.0	66.3	56.6	57.3
With spouse/partner	15.0	19.3	17.2	25.9	22.0
With other friends and relatives	12.9	12.8	11.8	12.8	12.6
With spouse and children	7.9	8.9	1.8	1.7	4.3
With children	3.7	4.4	1.6	1.8	2.4
With parents	2.5	2.6	1.3	1.2	1.4

About 40 percent of the visitors to Zanzibar came with their spouses, followed by those who came with other friends and relatives. Nonetheless, those who came with parents and with children were the least (Chart 2.21).

Chart 2.21: Travel party, Zanzibar



The trend of travel party shows that, majority of visitors came with their spouses, followed by those who came alone and other friends and relatives, with the exception of 2018 (Table 2.8).

Table 2.8: Travel Party, Zanzibar 2018 – 2022

Percent

Travel Party	2018	2019	2020	2021	2022
With spouse/partner	26.8	31.2	42.3	55.8	44.7
Alone	28.0	26.2	34.0	19.9	23.2
With other friends and relatives	19.5	17.7	16.6	17.6	16.9
With spouse and children	16.0	15.3	3.4	3.1	9.2
With children	5.4	5.7	1.3	1.8	3.3
With parents	4.3	3.9	2.5	1.8	2.7

Majority of visitors to URT under all travel parties were in the age group of "25-44", followed by those in the age group of "45-64" (Table 2.9). Similar pattern was observed in Zanzibar.

Table 2.9: Travel Party by Age Group, URT

Percent

	Age group					
Travel party	<18	18-24	25-44	45-64	65+	Total
Alone	1.0	9.8	57.0	27.3	4.9	100.0
With children	0.0	8.9	40.7	43.9	6.5	100.0
With other friends and relatives	0.8	16.8	56.5	20.5	5.4	100.0
With parents	14.3	29.5	37.9	18.3	0.0	100.0
With spouse and children	0.0	3.8	40.4	52.5	3.3	100.0
With spouse/partner	0.2	7.8	56.0	25.0	11.0	100.0

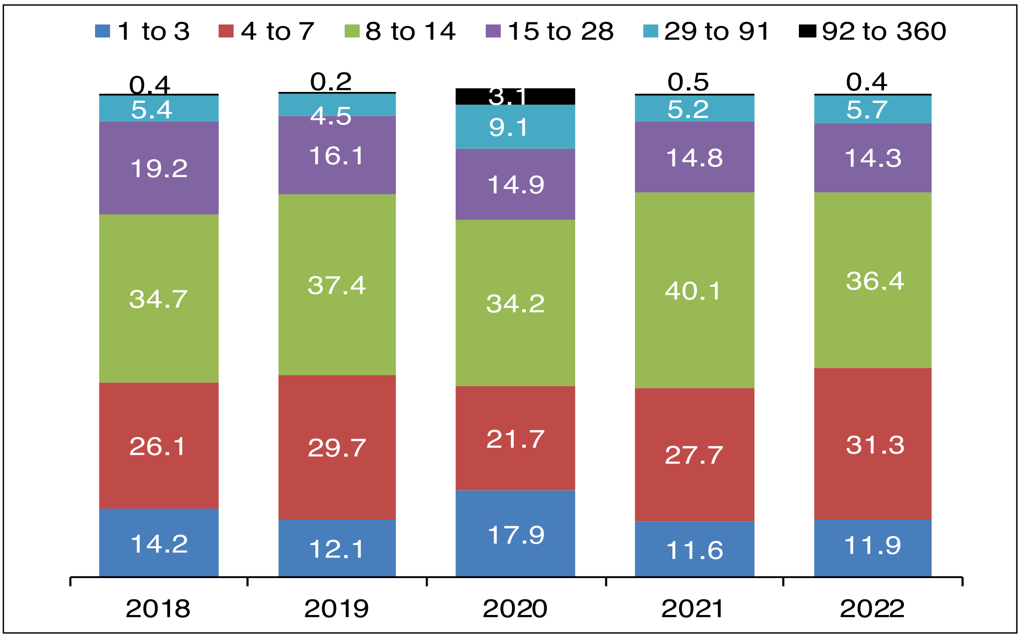
2.8 Nights Spent and Length of Stay

2.8.1 Nights Spent

Nights spent by visitors usually varied depending on purpose of visit and country of origin. The survey results depict that the majority of visitors who came to Tanzania spent 8 to 14 nights, followed by those who spent 4 to 7 nights. Those who spent 92 to 360 nights accounted for the least. These results portray almost similar findings to the previous surveys (Chart 2.22).

Chart 2.22: Proportion of Visitors by Nights Spent, URT

Percent



The distribution of visitors by nights spent and purpose of visit shows that the majority of the holiday makers and those visiting friends and relatives spent between 8 to 14 nights.Most of the business visitors and those who came for meetings and conference spent between 4 to 7 nights. Furthermore, a large proportion of visitors who came for medical treatment spent 29 to 91 nights (Table 2.10).

Table 2.10: Distribution of Visitors by Nights Spent and Purpose of Visit, URT

Percent

Night spent	Purpose of visit									
	Leisure and holidays	Business	Visiting friends and relatives	Medical treatment	Meetings and conference	Religion	Scientific and academic	Volunteering	Transit	Other
1 to 3	4.5	26.4	16.2	11.5	28.5	12.7	7.0	2.5	57.4	16.5
4 to 7	30.1	39.2	24.0	21.3	52.5	25.4	14.0	9.0	37.7	26.0
8 to 14	46.6	20.6	25.9	18.0	14.3	41.5	33.7	16.4	2.9	26.2
15 to 28	16.2	6.6	17.3	8.2	2.8	13.6	17.4	30.3	2.0	20.6
29 to 91	2.4	6.2	15.8	39.3	1.8	6.8	27.9	36.9	0.0	9.5
92 to 360	0.1	0.9	0.8	1.6	0.1	0.0	0.0	4.9	0.0	1.3
Grand Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

About 49 percent of the visitors to Zanzibar spent 8 to 14 nights, while those who spent more than a month accounted for about 5 percent (Chart 2.23). However, most of the holiday makers and those who came for meetings and conferences spent 8 to 14 nights, while business and VFR visitors spent 4 to 7 nights (Table 2.11).

Chart 2.23: Proportion of Visitors by Night Spent, Zanzibar

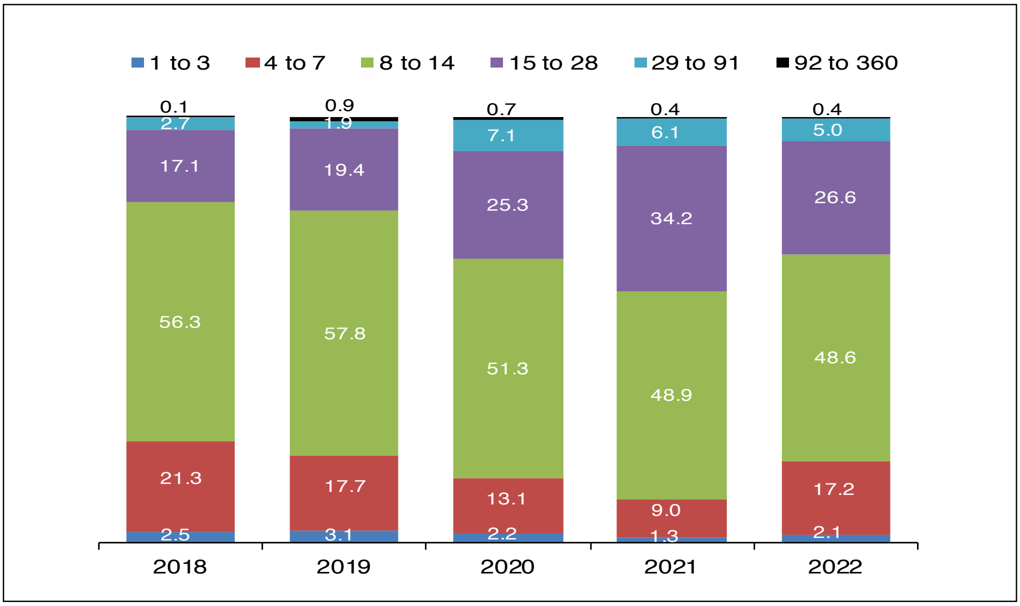


Table 2.11: Distribution of Visitors by the Nights Spent and Purpose of Visit, Zanzibar

Percent

Nights spent	Purpose of visit								
	Leisure and holidays	Business	Visiting friends and relatives	Medical treatment	Meetings and conference	Religion	Scientific and academic	Volunteering	Other
1 to 3	1.6	8.1	3.1	66.7	13.6	3.4	18.5	0.0	4.0
4 to 7	15.4	37.8	39.9	0.0	9.1	0.0	18.5	30.8	14.0
8 to 14	50.7	23.0	29.2	33.3	63.6	20.7	37.0	30.8	47.0
15 to 28	27.8	9.5	15.7	0.0	13.6	75.9	0.0	19.2	29.0
29 to 91	4.3	13.5	10.7	0.0	0.0	0.0	25.9	17.3	6.0
92 to 360	0.2	8.1	1.3	0.0	0.0	0.0	0.0	1.9	0.0
Grand Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

2.8.2 Average Length of Stay

The survey findings indicate that the overall average length of stay per person per nights was 9 nights. Visitors from Germany stayed the longest with an average of 14 nights. These results are similar to the previous findings, whereby visitors from long haul source markets stayed the longest. Visitors from Zimbabwe, Burundi and Kenya stayed the least (Table 2.12).

Table 2.12: Length of Stay by Purpose of Visit and Top 15 Source Markets, URT

	Purpose of visit					
Country of residence	Leisure and holidays	Business	Medical treatment	friends and relatives	Other	Average
Kenya	6	6	8	8	8	7
United States	10	9	6	13	10	10
United Kingdom	12	4		15	11	11
France	12	9		12	13	12
Germany	13	13		16	15	14
Zambia	7	8		11	7	8
Italy	10	6		21	15	13
Spain	10	4		10	15	10
Burundi	7	5	9	8	8	7
Zimbabwe	5	4	7	8	5	6
Uganda	7	6	4	9	16	8
Congo, DRC	9	9	6	9	12	9
United Arab Emirates	7	10		8	7	8
India	6	7		12	7	8
South Africa	8	6		6	11	8
Average	9	7	7	11	11	9

For the case of Zanzibar, the overall average length of stay was 7 nights, showing a decrease of 1 night from the 2021 results. Visitors from Italy, Poland and Netherlands stayed the longest (Table 2.13).

Table 2.13: Length of Stay by Purpose of Visit and Top 15 Source Markets, Zanzibar

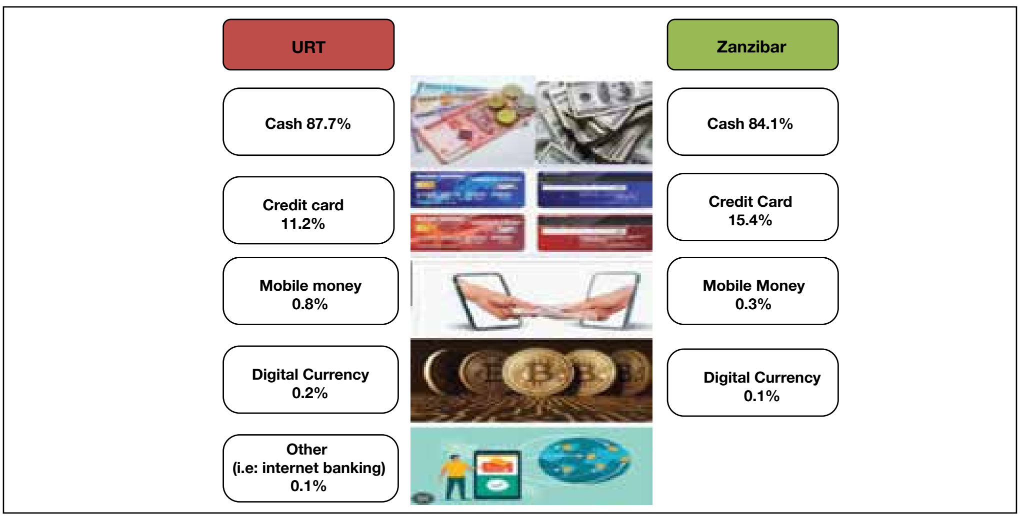
	Purpose of visit					
Country of residence	Leisure and holidays	Business	Medical treatment	Visiting friends and relatives	Other	Average
France	8	3		8	11	8
Germany	9	7		6	9	8
United Kingdom	7	2		5	5	5
United States	5	5		4	4	5
Spain	6			7	7	7
Italy	8	1		25	12	12
United Arab Emirates	6			5	5	5
Kenya	4	6	1	6	4	4
Poland	8	4		9	15	9
Portugal	7				6	7
Netherlands	8	5		12	9	9
Israel	7	7		14	5	8
South Africa	4	3		3	4	3
Switzerland	7	8		7	4	7
Canada	5			3	3	4
Average	7	5	1	8	7	7

2.9 Mode of Payment

Cash payment continue to be the dominant mode of settling bills by the visitors in both URT and Zanzibar, followed by credit cards. Meanwhile, in URT, the number of visitors who used other modes of payment such as internet banking remained small, similar to the previous surveys (Chart 2.24).

Chart 2.24: Mode of payment in URT and Zanzibar

Percent

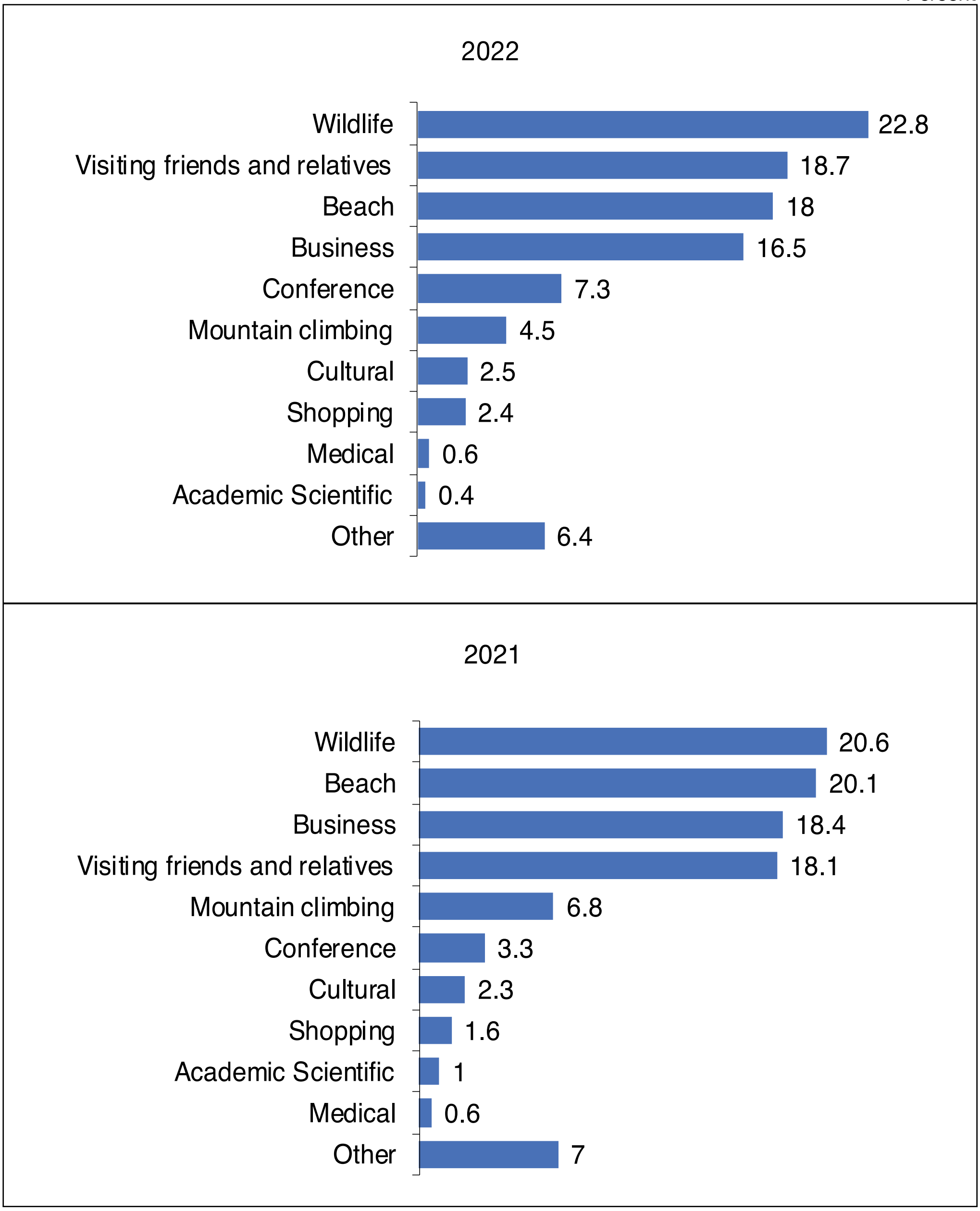


2.10 Main Tourism Activity

Wildlife, beach, business, and visiting friends and relatives maintained their status as the main tourism activities, accounting for 76.0 percent. Wildlife and beach tourism continued to be the leading tourism activities (Chart 2.25).

Chart 2.25: Main Tourism Activities in URT

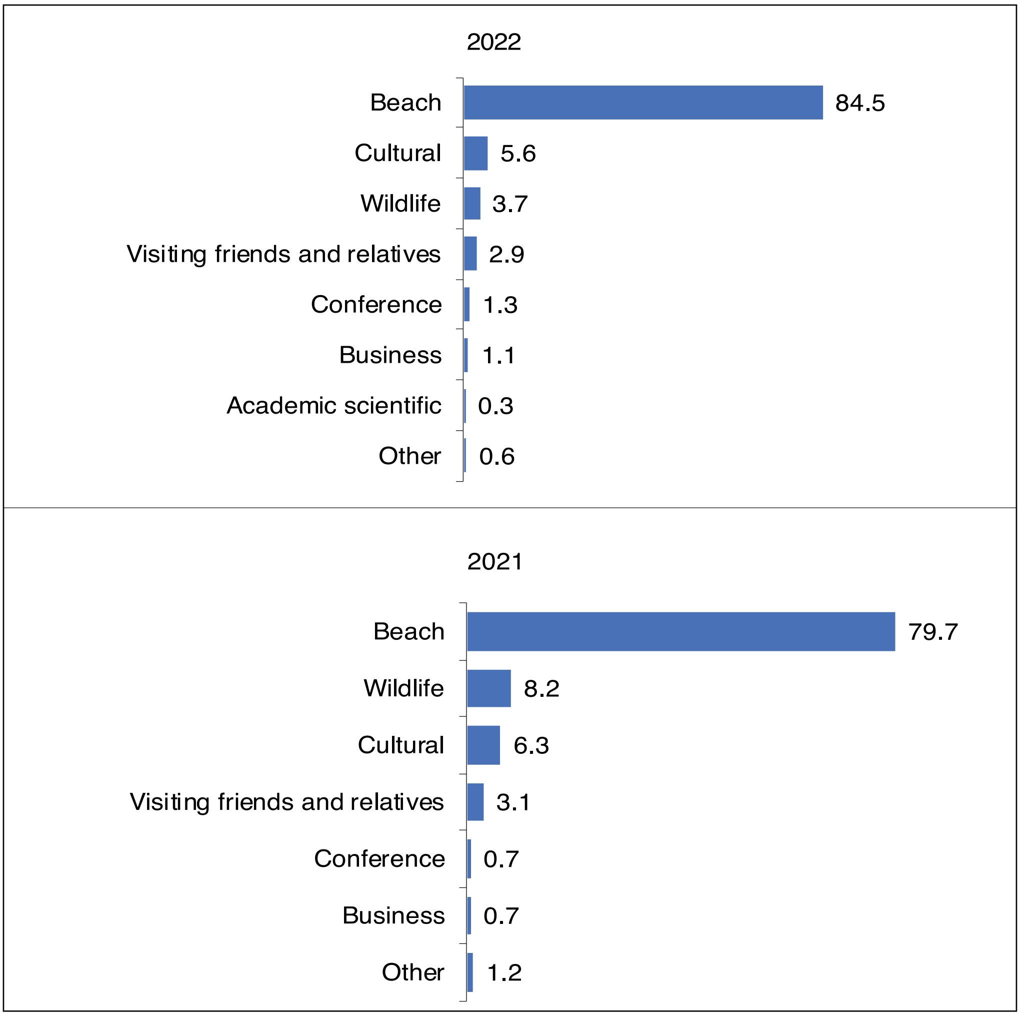
Percent



In Zanzibar, beach tourism continued to be the main tourism activity, constituting over 84 percent, followed by cultural tourism (Chart 2.26).

Chart 2.26: Main tourism activity in Zanzibar

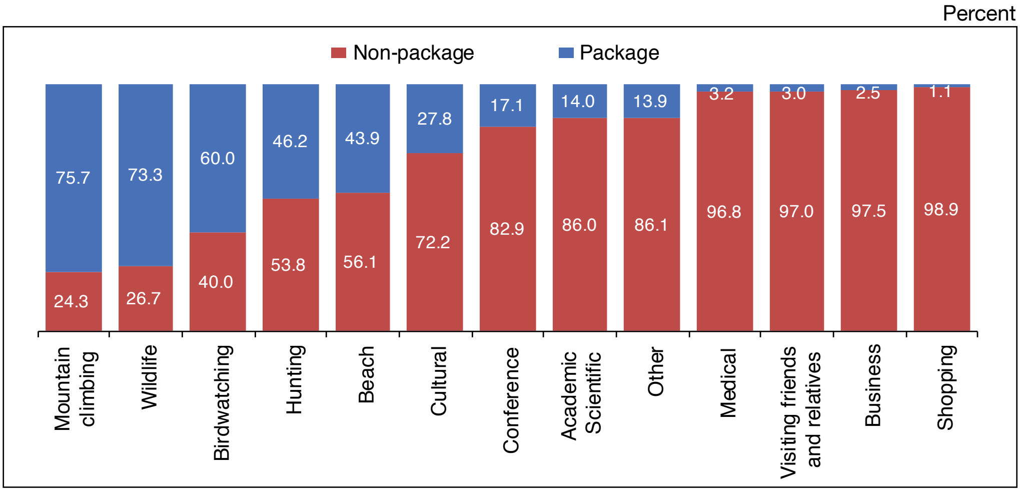
Percent



2.11 Tourism Activity by Travel Arrangement

Visitors under the package tour arrangement mostly came for wildlife and mountain climbing. Meanwhile, visitors under the non-package tour arrangement mainly came for business, visiting friends and relatives, medical, conferences, and cultural tourism, reflecting that the majority of these visitors under the non package came from the neighboring countries (Chart 2.27).

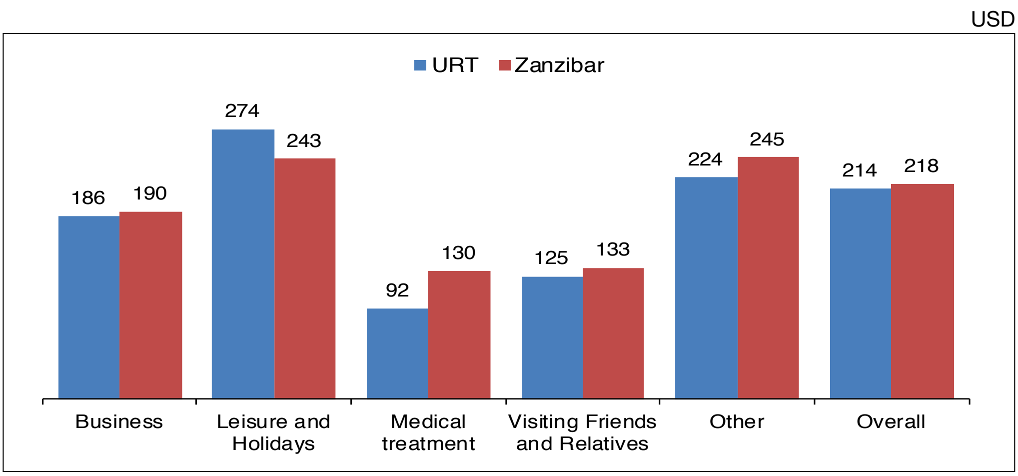
Chart 2.27: Tourism activity by travel arrangement



2.12 Average Expenditure

The overall average expenditure per person per night in the United Republic of Tanzania was USD 214, compared to USD 199 recorded in 2021. Leisure and holiday visitors had the highest average expenditure of USD 274, followed by visitors who came for business, while those who came for medical treatment had the lowest average expenditure of USD 92 per person per night. In Zanzibar, the overall average expenditure was USD 218 per person per night compared to USD 199 in 2021. Holidaymakers had the highest average expenditure of USD 243, followed by business visitors (Chart 2.28).

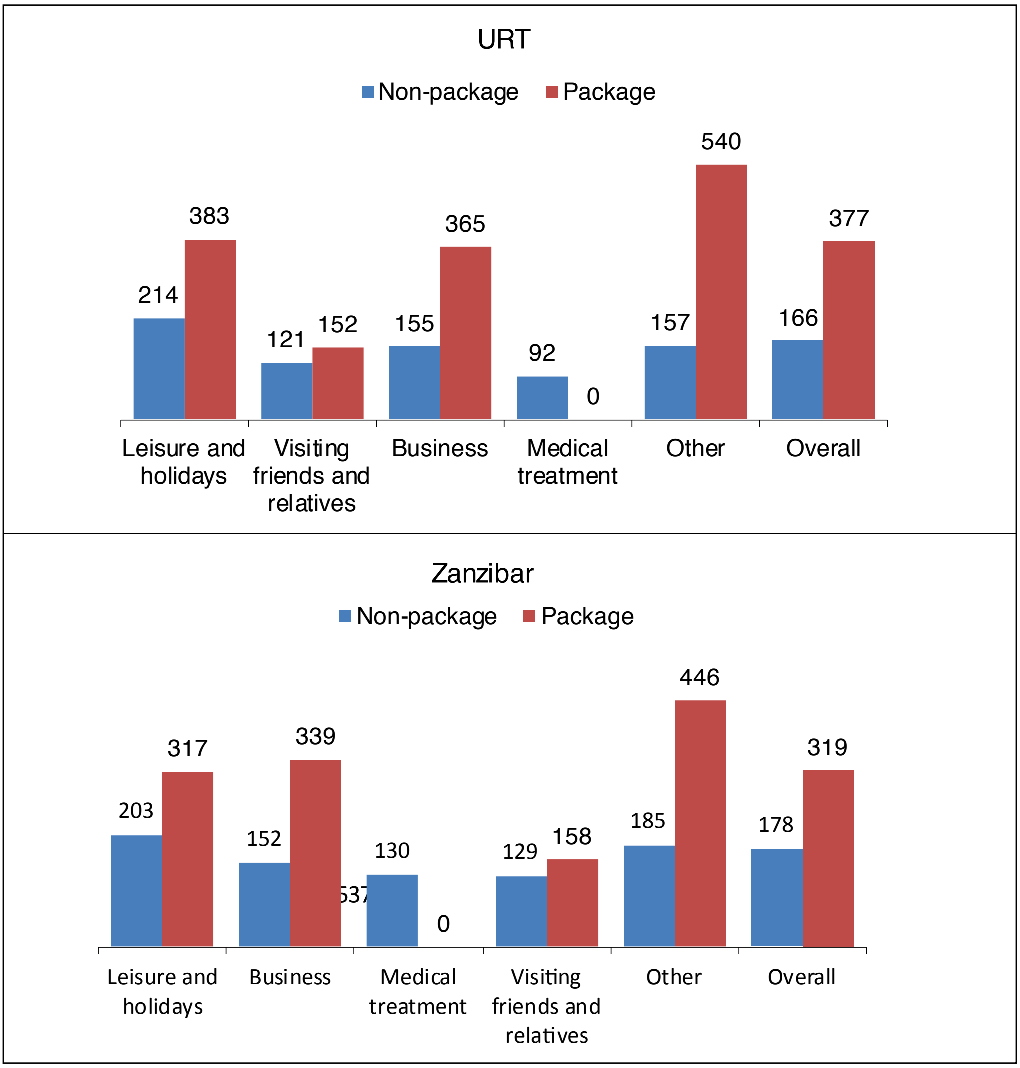
Chart 2.28: Average Expenditure per Person per Night



Looking at travel arrangements, the average expenditure under the package tour arrangement in the United Republic of Tanzania was USD 377 per person per night. The average expenditure under the non-package tour arrangement was USD 166 per person per night. In Zanzibar, the average expenditure under the package tour arrangement was USD 319, while under the non-package was USD 178 per person per night. In all purposes, visitors who came under the package tour arrangement spent more on average compared to those who came under the non-package tour arrangement (Chart 2.29).

Chart 2.29: Average Expenditure by Travel Arrangement and Purpose of Visit

USD



Visitors from the United States of America spent the most with an average expenditure of USD 400 per person per night. Other high spenders were visitors from the United Kingdom, India, and the United Arab Emirates. Visitors from Burundi and DRCongo spent the least, with an average expenditure of USD 64 and USD 97, respectively (Table 2.14).

Table 2.14: Average Expenditure per Person per Night by Travel Arrangement, URT

USD

Source market	Non-Package	Package	Overall
Kenya	128	191	151
United States	157	804	400
United Kingdom	127	331	214
France	138	162	148
Germany	108	238	151
Zambia	94	244	159
Italy	121	184	148
Spain	114	283	148
Burundi	44	166	64
Zimbabwe	117	na	117
Uganda	82	169	97
Congo, DRC	89	na	89
United Arab Emirates	150	380	208
India	138	351	209
South Africa	126	527	146

Note: n.a. denotes not availableIn Zanzibar, Visitors from the United States of America spent the most, followed by the United Kingdom, Portugal and United Arab Emirates, while visitors from Israel spent the least. Examining the distribution by travel arrangement, the survey results show that under the non-package tour, visitors from Portugal had the highest average expenditure of USD 229, followed by the United Kingdom (Table 2.15).

Table 2.15: Average Expenditure per Person per Night by Travel Arrangements, Zanzibar

USD

Source market	Non-Package	Package	Overall
France	138	142	140
Germany	133	213	160
United Kingdom	219	324	254
United States	139	970	495
Spain	134	199	155
Italy	122	221	155
United Arab Emirates	132	371	212
Kenya	148	237	193
Poland	108	317	192
Portugal	229	202	215
Netherlands	84	178	131
Israel	122	109	117
South Africa	168	84	147
Canada	81	233	195
Switzerland	181	402	188

2.13 Tourism Earnings

Tourism earnings in the United Republic of Tanzania have picked up almost reverting to the pre-pandemic levels (Chart 2.30). The earnings rose by 92.3 percent to USD 2,527.8 million in 2022, from USD 1,310.3 million estimated in 2021, mainly driven by increase of international arrivals particularly from traditional markets. Out of the total earnings, USD 2,422.8 million was earned from tourists who came for leisure and holidays, accounting for 95.8 percent of the total earnings (Table 2.16). Findings further reveal that about 67 percent of total earnings were received from visitors who came under the package tour arrangement.

Chart 2.30:Tourism Earnings, 2018-2022

USD Millions

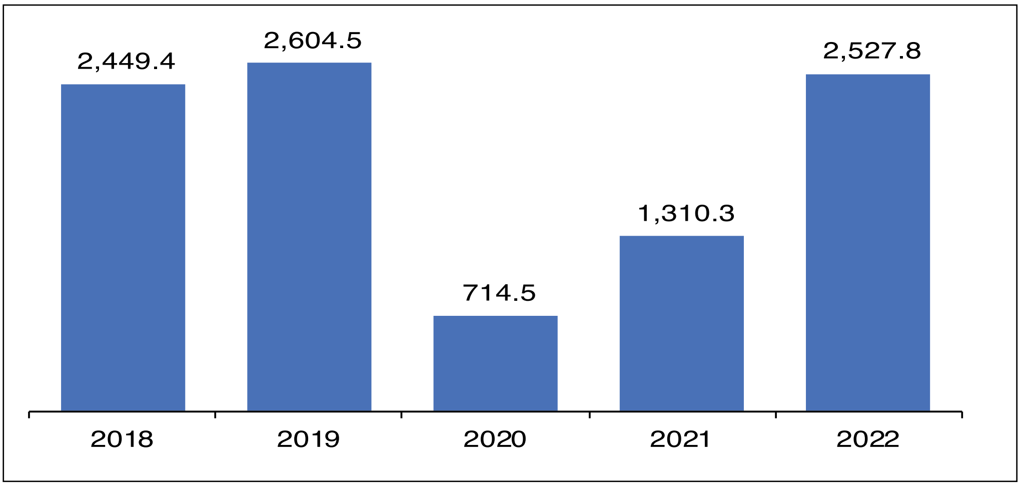


Table 2.16: Tourism Earnings by Travel Arrangement and Purpose of Visit, URT

USD Millions

	Travel Arrangement		
Purpose of visit	Package	Non-package	Total earnings
Business	0.7	33.0	33.8
Leisure and holidays	1,673.9	748.9	2,422.8
Visiting friends and relatives	5.0	37.1	42.1
Other	6.6	22.6	29.1
Tourism Earnings	1,686.2	841.6	2,527.8

Tourism earnings in Zanzibar increased by 25.1 percent to USD 844.9 million in 2022 compared with USD 675.4 million in 2021. The incease was driven by increase in the number of visitors and average expenditure per person. Tourist arrivals to Zanzibar in 2022 were 447,959 compared to 318,522 in 2021, an increase of 40.6 percent. Large share of earnings was from visitors who came for leisure and holidays, which was USD 841.5 million, while earnings from business and others were the lowest (Table 2.17). Earnings from visitors under the non-package tour arrangement accounted for 56.3 percent in Zanzibar.

Table 2.17: Tourism Earnings by Travel Arrangement and Purpose of Visit, Zanzibar

USD Millions

Purpose of visit	Travel arrangement		Total earnings
	Package	Non-package	
Business	0.1	0.3	0.4
Leisure and holidays	369.2	472.3	841.5
Visiting friends and relatives	0.1	2.5	2.6
Other	0.1	0.2	0.3
Tourism earnings	369.5	475.4	844.9

2.14 Sector Outlook

According to January 2023 UNWTO, International tourism saw stronger than expected results in 2022, backed by large pent-up demand and the lifting or relaxation of travel restrictions in many countries. Notwithstanding, the global shocks ranging from the emergence of Omicron and the war in Ukraine at the beginning of the year coupled with climate changes, international tourism displayed immense resilience, reflected by strong recovery in arrivals.

Looking ahead, international tourism is set to consolidate its recovery in 2023, backed by continued strong demand, particularly from Asia and the Pacific as destinations and markets open up. Based on UNWTO's scenarios, international tourist arrivals could reach between 80 percent and 95 percent of pre-pandemic levels, with Europe expected to drive the outlook, and considerable room for recovery in some destinations and sub-regions. The removal of COVID-19 related travel restrictions in China – the world's largest outbound market in 2019, is a significant step to the recovery of the tourism sector in Asia and the Pacific, and globally at large.

This positive outlook is also reflected in the Tanzanian tourism industry, with the number of tourists growing by about 58 percent in 2022, compared to 2021. This good performance was supported by concerted efforts of promoting destination Tanzania by both the Government and the private sector. The maiden Royal tour has created immense publicity of the unique tourist attractions in Tanzania, together with other initiatives including digital marketing, on board promotions with airlines, Mega farm trips, roadshows and exhibitions, among others. Therefore, prospects for 2023 are optimistic, supported by continued increase in number of arrivals and their corresponding earnings. However, the challenging economic environment, including high inflation and interest rates, the spike in oil and food prices, as well as the fears of a global recession, remain the downside risks on the recovery of tourism.

2.15 Visitors' Impression and Areas of Improvement

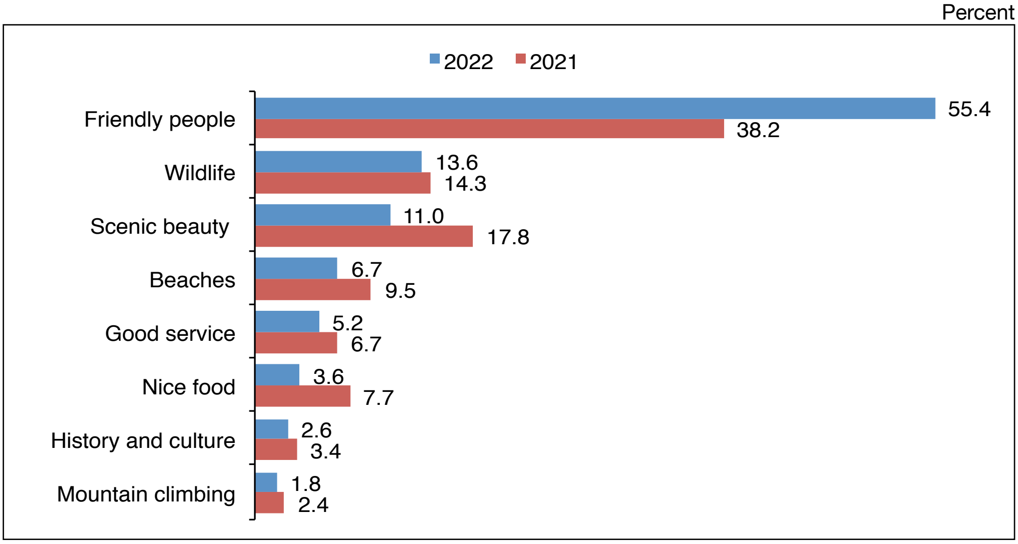
One of the target of this survey is to get feedback from tourists visiting Tanzania in terms of what impressed them most during their visit as well as areas they feel need improvement to make Tanzania a better tourist destination. This feedback has been instrumental in helping to strategize on policy and promotional initiatives going forward.

2.15a Visitors' Impression

Over the years, friendliness of Tanzanian people has been ranked high by visitors largely because the residents are well known for being welcoming and polite to visitors, and there is a strong sense of national pride. The country has over 120 ethnic groups living harmoniously together, which explains the country's peace and political stability. Survey results show that about 55 percent of interviewed visitors in 2022 were mostly impressed by friendliness of Tanzanians. Other impressive areas are wildlife, scenic beauty, and beaches (Chart 2.31).

Chart 2.31: Visitors' Impression

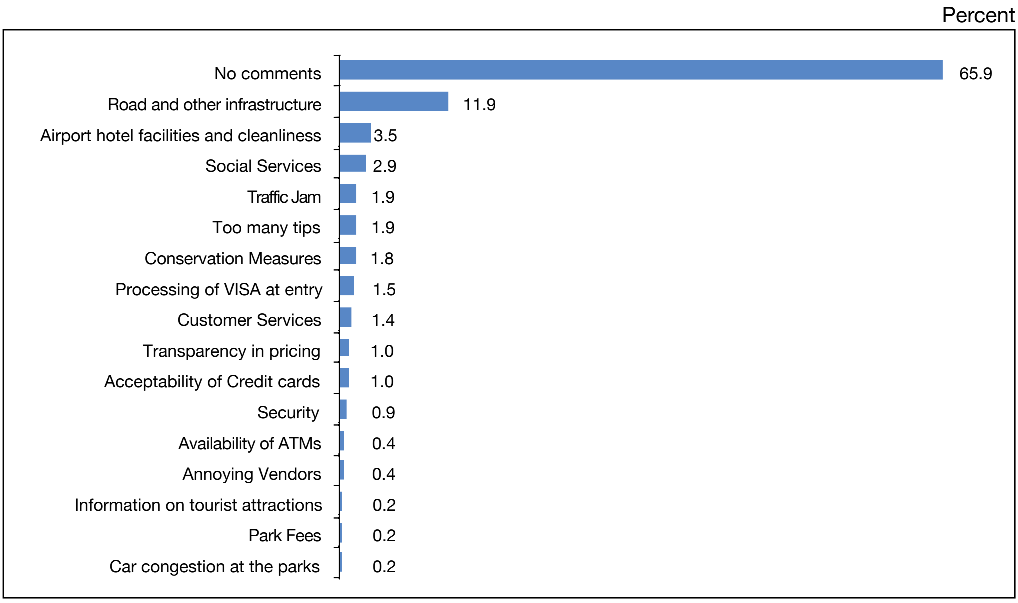
Percent



2.15b Areas That Need Improvement

Majority of the interviewed visitors, indicated that about 66 percent, felt the trip was a rewarding experience as everything was generally fine and therefore did not have any specific areas that need improvement. However, 14.9 percent recommended improvement on roads particularly those leading to and within attraction areas. Few visitors indicated the need to improve cleanliness at airports and hotels as well as social services. Notwithstanding, the Government continues to give priority to transport infrastructure development as well as environment conservation in general (Chart 2.32).

Chart 2.32: Areas that need improvement



Chapter 3: Conclusion and Recommendations

3.1 Conclusion

Tanzania's tourism sector showed recovery in 2022, emanating from both supply and demand effects. The recovery of the sector from the pandemic which started to set in gradually from the second half of 2021, continues to provide positive prospects for 2023, onwards.

The results from the survey show that tourism earnings in URT rose by 92.3 percent to USD 2,527.8 million in 2022, from USD 1,310.3 million in 2021, driven by increase of international arrivals which edged up by 57.7 percent to 1,454,920 in 2022, from 922,692 recorded in 2021 mainly from the traditional source markets. The surge in earnings is also attributed to increase in overall average spending per visitor per night with URT recording overall average expenditure of USD 214, compared with USD 199 per person per night in 2021.

In Zanzibar, the average expenditure per person per night was USD 218 from USD 199 per person per night in 2021. Meanwhile, the average length of stay was 9 nights and 7 nights for URT and Zanzibar, respectively.

3.2 Recommendations

The tourism industry has shown resilience and important source of foreign exchange earnings for Tanzania. The performance of the sector therefore has significant impacts to the economy. In this regard, it is crucial to involve governmental bodies, local communities, tourism stakeholders, and private businesses in implementing multiple strategies to continuously monitor, evaluate, and adapt initiatives that will help ensure effectiveness in driving sustainable growth in the tourism industry. Therefore, key issues of intervention to improve growth and development in the sector is summarized in **Matrix I**.

Matrix I: Summary of Major Policy Issues and Actions

S/n	Key issue	Description	Required intervention	Specification	Responsible Ministry/ Authority
1.	Diversification/ expanding of tourism offerings.	Expand the range of tourism offerings to attract a diverse set of visitors by identifying and developing niche markets.	Invest on increasing number of arrivals by creating specific attractions and promoting them.	1. Dab in adventure tourism, eco-tourism, cultural tourism, or gastronomic tourism, based on your destination's unique strengths. 2. Collaborate with local businesses and entrepreneurs to create innovative and authentic experiences, including culinary tours, nature expeditions, art and craft workshops, or historical tours.	MNRT, MTH, TCT, ZCT
2.	Cultural and Natural Heritage.	Emphasize the promotion and preservation of Tanzania's rich cultural and natural heritage. Tourists are not offered with historical backgrounds of Tanzanian tribes with exception of the Maasai.	Develop and promote cultural events, festivals, and exhibitions that showcase the diverse traditions and customs of local communities	1. Implement initiatives that educate tourists about conservation efforts and the importance of responsible tourism. 2. Emphasize domestic preservation of different cultural heritages to preserve history and build a solid foundation of Tanzanian's identity.	MNRT, TTB, ZCT.

S/n	Key issue	Description	Required intervention	Specification	Responsible Ministry/ Authority
3.	Marketing and promotion	Enhance marketing efforts to raise awareness and attract more tourists to Tanzania.	Develop a comprehensive marketing strategy that highlights the country's unique attractions, such as Mount Kilimanjaro, Serengeti National Park, and Zanzibar's pristine beaches.	1. Collaborate with travel influencers, bloggers, and media outlets to create compelling content that showcases the beauty and diversity of Tanzania. 2. Utilize digital marketing channels, social media platforms, and travel websites to reach a global audience.	MNRT, TTB, ZCT, TCT & MoFP.
4.	Roads leading to and within attraction areas	Road infrastructure especially those leading to and within attraction areas need to have regular maintenance.	Regular maintenance of roads in some National Parks.	Enhance budget allocation for undertaking regular maintenance of roads in some National Parks	TANAPA, MWT and NCAA.
5.	Cleanliness of washrooms in public areas	Cleanliness of washrooms is not adequately addressed.	Improve cleanliness at all tourists designated areas	Address issues of cleanliness at public areas.	TANAPA, NCAA, Local Goververment and TCT

Appendices

Appendix A: Survey Methodology

I. Introduction

The survey adopted standard methodology for conducting International Visitors' Exit Surveys in Tanzania since 2001. It was designed to collect a wide range of information that would facilitate policy review, planning and decision-making processes. Furthermore, it will assist in promotional efforts in order to attract more visitors. It covered aspects of sample design; survey tools; scope and coverage; training; data collection and processing; and expenditure estimation procedures.

II. Scope of the Survey

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

III. Sample Size

The sample survey managed to randomly interview 6,777 respondents, representing 11,849 departing international visitors. This sample was considered sufficient to meet the survey's objectives.

IV. Survey's Coverage

In order to obtain the required information from international visitors, it was important to conduct the survey at entry/exit boarder points. The survey covered eight departure points namely: Julius Nyerere International Airport, Kilimanjaro International Airport, Abeid Amani Karume International Airport, Horohoro, Namanga, Tunduma, Mtukula and Manyovu border points.

V. Training of Interviewers

Prior to fieldwork, a one-day training of enumerators and supervisors was organized for them to understand the questionnaire and the interviewing techniques. A total of 30 interviewers were involved in the training. During the training session, mock interviews were conducted among enumerators to impart the required skills. Enumerators were also trained in methods of field editing, data quality control procedures and fieldwork coordination. The Interviewers' Manual was used as a guideline document during the training.

VI. Data Collection

Following the training of interviewers, eight teams were formed (1 for Zanzibar and 7 for Mainland Tanzania). Data collection exercise was undertaken during the tourist peak season, which normally runs from July to September. It was conducted for a two-week period, starting on 15th September 2022. Fieldwork supervision was coordinated by the Technical Committee staff who made visits to the teams to review the work and monitor data quality, including consistency checks and questionnaire completeness.

VII. Interviewers' Manual

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

VIII. The Questionnaire

The questionnaire was designed to ensure that the questions asked were in line with users' data needs. The information collected is useful for tourism promotion and macroeconomic policy formulation. The content of the questionnaire was mostly similar to the previous years' questionnaire with slight modifications. The questionnaire had 27 questions and it comprised four main parts, namely: visitor profiles, travel behavior, expenditure patterns and visitor comments (**Appendix III**).

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

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

Questions 19 to 22 were structured to establish tourists' earnings ascribed to Tanzania. In addition, the questions probed for details on the amount of money spent in Tanzania as well as the mode of payments used to transact.

Questions 23 to 24 ask visitors if it is their first trip to Tanzania and whether they will come again.

Question 25 and 27 seek information from visitors on the areas of impression or improvements and if coronavirus did affect their travel plans.

IX. Data Processing

The processing of the 2022 International Visitors` Exit Survey data began shortly after completion of fieldwork. Data processing involved manual editing, coding of open-ended questions, data entry and editing of computer-identified errors. Data entry and editing were accomplished using the ORACLE11g database and web-based application.

X. Tourist Expenditure Estimation

Tourist 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 by purpose of visit, proportion of visitor by travel arrangement and average length of the stay.

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** travel arrangement (The arrivals as recorded by the Immigration Department, adjusted into package visitors by purpose using survey results)

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

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

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 2022:

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

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

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

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

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

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

THE 2022 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 accurate 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:

CODE NUMBER: ______________________________

NAME OF THE ENUMERATOR: ______________________________

*DATE:*______________________ *SIGNATURE:* ______________________

NAME OF THE DATA ENTRANT: ______________________________

1. Nationality ______________ Country of usual residence ______________

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

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

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

Alone	[ ]	*If alone, go to question 7*
With spouse/partner	[ ]	
With spouse and children	[ ]	
With children/parents	[ ]	
With other friends and relatives	[ ]	

4. Are you sharing expenses with people you are travelling with?
(tick) Yes [ ] No [ ] (if no go to question 7)

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

6. Write the number of persons you shared expenses with according to the following age groups (except yourself)

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

7. Gender (including yourself) Number of females [ ]
Number of males [ ]

8. What was your MAIN purpose of visit in Tanzania *(tick one only)*

Meetings and Conference	[ ]	Leisure and holidays	[ ]
Business	[ ]	Medical treatment	[ ]
Visiting Friends and Relatives	[ ]	Religion	[ ]
Scientific and Academic	[ ]	Transit	
Volunteering		Other (please specify)...............	

9. 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 Safari/Game viewing	[ ]	Mountain climbing	[ ]
Beach tourism	[ ]	Hunting tourism	[ ]
Cultural tourism	[ ]	Visiting friends and relatives	[ ]
Business	[ ]	Shopping (for business)	[ ]
Bird-watching	[ ]	Meetings and conferences	[ ]
Medical treatment	[ ]	Forest walk	
Scientific and academic		Other (please specify) …………………….	

10. 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. Kilimanjaro	[ ]	Nakupenda Tour	[ ]
Udzungwa	[ ]	Serengeti	[ ]	Gombe	[ ]	Beach (specify) ……	
Jozani Forest	[ ]	Dolphin Tour	[ ]	Spice Tour	[ ]	Beach (specify) …..	
Other (Specify) …………………………………………………………							

11. What was the MAIN source of information about Tanzania *(tick one only)*

Travel agents/ Tour operators	[ ]	Inflight magazines	[ ]
Friends/relatives	[ ]	Tanzania's missions abroad	[ ]
Royal tour documentary		Internet/Website (please specify): ...	
Trade fair	[ ]	Radio (please specify)………	[ ]
Newspapers. Magazines, brochures	[ ]	TV i.e. CNN, BBC, Safari Channel (please specify): ..	[ ]
Travel advisory	[ ]	Other (please specify)…………..................	

12. Did you travel in package tour or independently?
(*If you travelled independently, go to question 16*)

Package	Independently

13. 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	[ ]
Transportation within Tanzania	[ ]	Other (please specify)	

14. Total cost of the package tour:

Currency	Amount

15. Is the total cost for the whole group? (tick)

Yes [ ] No [ ]

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

17. Number of nights spent in:

Tanzania Mainland	
Zanzibar Islands	

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

Currency	Amount

19. How much money did you spend WHILE in Tanzania during this trip including cash, Debit/Credit cards, Digital currency?
(please give your best estimate in case you do not remember the exact figures)

Currency	Amount

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

Items	**Currency code**	**Amount**
Accommodation (hotel, lodge, camp site, etc)		
Food and drinks		
Transportation within Tanzania by		
Air (including charter hire)		
Road (including car hire)		
Water (Including Boat hire)		
Railway		
Cultural services charges (museums, historical sites, etc.)		
Hot air Balloon		
Sports and recreational (kitesurfing, cycling etc.)		
Diving, snorkeling and water games		
Sightseeing and excursion (Safari and game viewing)		
Mountain climbing		
Hunting		
Access/entry/gate fees		
Visa fees		
Fuel (transit cars, foreign owned vehicles excluding trucks)		
Charges related to international vehicle pick up		
Gifts (Souvenirs) such as precious metals, crafts, etc.		
Tips		
Donations (tick one) [Health ( ), Education ( ), Sports ( ), Charity ( ), Religious ( ), social and cultural ( )]		
Shopping (for business)		
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)

Cash [ ] Credit/Debit card [ ] Mobile money [ ] Digital Currency [ ] Other (Please specify): ……………………………………………………

23. Did the Royal Tour Documentary influence your decision to visit Tanzania?
Yes [ ] No [ ]
Please explain: ……………………………………………………………
……………………………………………………………………………

24. Is this your first trip to Tanzania? (tick) Yes [ ] No [ ]

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

26. What impressed you most during your trip to Tanzania? *(Please specify)*
……………………………………………………………………………
……………………………………………………………………………

27. Were you satisfied with the quality of services provided to you while in Tanzania? Yes [ ] No [ ]
Please explain ……………………………………………………………
……………………………………………………………………………
……………………………………………………………………………

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

Appendix C: International Visitors' Arrival by Country of Residence

Country	Visitors	% Share
Kenya	1,541	13.01
United States	1,356	11.44
United Kingdom	992	8.37
France	925	7.81
Germany	872	7.36
Zambia	786	6.63
Italy	454	3.83
Spain	449	3.79
Burundi	389	3.28
Zimbabwe	381	3.22
Uganda	363	3.06
Democratic Republic of the Congo	311	2.62
United Arab Emirates	272	2.30
India	217	1.83
South Africa	189	1.60
Canada	177	1.49
Netherlands	174	1.47
Poland	147	1.24
Israel	143	1.21
Portugal	132	1.11
Belgium	109	0.92
Switzerland	103	0.87
Rwanda	90	0.76
Austria	85	0.72
Australia	71	0.60
Russian Federation	67	0.57
Denmark	58	0.49
Romania	55	0.46
Brazil	55	0.46

Country	Visitors	% Share
Oman	45	0.38
Ireland	40	0.34
Czech Republic	38	0.32
Luxembourg	36	0.30
Sweden	35	0.30
Egypt	34	0.29
Comoros	33	0.28
Norway	30	0.25
Nigeria	27	0.23
China	26	0.22
Finland	21	0.18
New Zealand	20	0.17
Mozambique	20	0.17
Morocco	20	0.17
South Sudan	19	0.16
Thailand	18	0.15
Malawi	16	0.14
Ethiopia	15	0.13
Serbia	15	0.13
Singapore	14	0.12
Algeria	14	0.12
Japan	14	0.12
Uruguay	13	0.11
Saudi Arabia	13	0.11
Botswana	12	0.10
Mauritius	12	0.10
Pakistan	11	0.09
Croatia	11	0.09
Sudan	10	0.08
Estonia	10	0.08

Country	Visitors	% Share
Slovakia	10	0.08
Hungary	10	0.08
Namibia	10	0.08
Swaziland	10	0.08
Greece	10	0.08
Ghana	10	0.08
Iceland	10	0.08
Malaysia	9	0.08
Mexico	8	0.07
Cameroon	8	0.07
Qatar	7	0.06
Cyprus	7	0.06
Nepal	7	0.06
Korea, South	6	0.05
Jordan	6	0.05
Cote D Ivoire	6	0.05
Malta	6	0.05
Iran, Islamic Republic Of	6	0.05
Somalia	5	0.04
Kuwait	5	0.04
Lebanon	5	0.04
Turkey	4	0.03
Peru	4	0.03
Korea, North	4	0.03
Monaco	4	0.03
Bahrain	4	0.03
Burkina Faso	4	0.03
Slovenia	4	0.03
Belarus	4	0.03
Congo-Brazzaville	4	0.03

Country	Visitors	% Share
Colombia	3	0.03
Georgia	3	0.03
Niger	3	0.03
Latvia	2	0.02
Iraq	2	0.02
Sri Lanka	2	0.02
Honduras	2	0.02
Barbados	2	0.02
Gambia	2	0.02
Albania	2	0.02
Tunisia	2	0.02
Suriname	2	0.02
Angola	2	0.02
Bulgaria	2	0.02
Argentina	2	0.02
Vietnam	1	0.01
Costa Rica	1	0.01
Togo	1	0.01
Bangladesh	1	0.01
Papua New Guinea	1	0.01
Philippines	1	0.01
Indonesia	1	0.01
Seychelles	1	0.01
Fiji	1	0.01
Jamaica	1	0.01
Kazakstan	1	0.01
Madagascar	1	0.01
Andorra	1	0.01
Senegal	1	0.01
	11,849	100

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   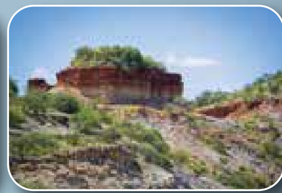

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