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2019 INTERNATIONAL VISITORS' EXIT SURVEY REPORT

TANZANIA TOURISM SECTOR SURVEY

THE 2019 INTERNATIONAL VISITORS' EXIT SURVEY REPORT

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ACRONYMS

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

GLOSSARY

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

Average length of stay - average number of nights that visitors spend at destination.

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

Cultural tourism: is the subset of tourism relating to culture, specifically the lifestyle of the people, history, art, architecture, religion(s), and other elements that define their way of life.

Demographic characteristic: personal information about customers including, age, income and gender.

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

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

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

Low season: the time of the year at any given destination, when tourist flows are at their lowest, also known as off- peak season.

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

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

Tour operator: an entity which designs, develops markets and operates packaged travel and tourism products and tours. Tour operators sell tourism products through travel agents or directly to consumers.

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

Travel agent: an entity that arranges travel for individuals or groups. Travel agents may be generalists or specialists (cruise, adventure travel, conventions and meetings). The agents receive a minimum 10 percent commission from accommodations, transportation companies and attractions for coordinating the travel. They typically coordinate travel for their customers at the same or lower cost than if the customers booked the travel on their own.

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

Trade show/Tourism show: a tourism event that involves exhibitions of destinations and tourism products. It is an event, which provides a unique opportunity to showcase tourism products, and services, meet, network, negotiate and conduct business with domestic and international tourism stakeholders.

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

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

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

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

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

FOREWORD

It is encouraging to bring to you the 18th International Visitors' Exit Survey Report. Since its inception in 2001, these reports have served as a useful source of information for decision making, not only by those in the governments but also the business community and visitors. Mindful of this importance, we have been improving the coverage and analysis with a view to capturing dynamics in the tourism industry, both domestically and globally. In this report, analysis has been expanded to capture, among other things, behaviours of neighbouring visitors in comparison to those from long haul destinations, the effect of government policies on tourism sector's development, visitors' views about the country when compared with other countries visited in the region before coming to Tanzania.

On development, tourism continues to be an important source of Tanzania's foreign earnings. In 2019, earnings from tourism increased by 7.9 percent to USD 2,604.5 million, from the level registered in 2018 following the increase in the number of international visitors to 1,527,230, from 1,505,702 reported in 2018. The achievement was partly contributed by the Government's continued efforts to promote the country's tourist attractions and the increase in demand for leisure and holidays globally. These factors are likely to continue to be crucial in scaling up Tanzania's tourism earnings going forward, largely benefiting from the dividend of huge endowment in tourist attractions including wildlife, beautiful white sandy beaches, historical sites and wonderful landscapes. However, the degree of increase is likely to be constrained by measures taken by countries to contain the spread of COVID-19, which have culminated into lockdowns and slowdown in global demand for goods and services. To cushion the tourism industry from such global shocks, it is utterly important to carry on measures directed at improving the quality of products we offer, and diversifying products and markets as well.

We believe that this report, which is a joint initiative by the Ministry of Natural Resources and Tourism, Bank of Tanzania, National Bureau of Statistics, Immigration Services Department and the Zanzibar Commission for Tourism provides valuable information for various uses.

Hon. Dr. Hamisi Kigwangalla (MP)	**Prof. Florens A. M. Luoga**
Minister	**Governor**
Ministry of Natural Resources and Tourism	**Bank of Tanzania**

ACKNOWLEDGEMENT

The Steering Committee of the Tanzania Tourism Sector Survey would like to express appreciation to various stakeholders involved in the preparation of the 2019 International Visitors' Exit Survey report. Guidance and support received from the Chief Executive Officers of the participating institutions namely: the Ministry of Natural Resources and Tourism (MNRT); Bank of Tanzania (BOT); National Bureau of Statistics (NBS); Immigration Services Department (ISD); Zanzibar Commission for Tourism (ZCT) and the Tourism Confederation of Tanzania (TCT) is highly valued.

The Committee is grateful to the staff of the Immigration Services Department, particularly the officers in-charge at the Julius Nyerere International Airport, Abeid Amani Karume International Airport, Kilimanjaro International Airport, Horohoro, Namanga, Tunduma, Mtukula and Manyovu boarder points. The profound gratitude goes also to the researchers and data entrants for their commitment and hard work.

The overall supervision of this work was under the conscientious leadership of Mr. Deograsias Mdamu (Director of Tourism – MNRT) and Dr. Suleiman Missango (Director, Economic Research and Policy-BOT). Other members of the Steering Committee are Mr. Daniel Masolwa (Director for Economic Statistics – NBS), Mr. Edward Chogero (Commissioner, Finance and Administration - ISD) and Dr. Miraji Ussi (Director for Marketing and Promotion – ZCT). The Technical Team was led by Paskasi Mwiru (MNRT) and Festo Mlele (BOT). Other members of the team are Dr. Deogratias Macha, Villela Waane, Phillip Mboya, Evarist Mgangaluma, Tumaini Longishu, Eliya Jairo, Lucy Kahwili, Paul Lawuo and Rweyemamu Barongo from BOT; Josephat Msimbano from MNRT; Valerian Tesha, Eliaranya Lema and Jovitha Rugemalila from NBS; Philimon Msenya from ISD; and Maabad Jaffar from ZCT.

EXECUTIVE SUMMARY

Introduction

Tourism continued to be among the key drivers of growth in Tanzania with its impact translating into persistent increase in foreign exchange earnings. Cognizant of such economic importance of the sector, the country undertakes annual international visitors' exit surveys with the objectives of estimating tourists' expenditure pattern, number of arrivals, travel arrangement and tourist demographic characteristics. Hitherto, 18 annual survey cycles have been conducted since 2001. The results of the survey serve as strategic precursor to policy formulations and implementation as well as inputs in compilation of the National Accounts and Balance of Payments statistics. Further, these statistics are part and parcel of promotion materials of Tanzania as a holiday destination.

World tourism developments

Global international tourist arrivals grew by 4 percent to 1.5 billion in 2019 and were within the projected growth band of 4 - 5 percent. Albeit the growth was at lower rate compared with 6 percent in 2018, weighed-down by a slow growth in the advanced economies owing to uncertainty surrounding the Brexit, geopolitical, trade tensions and subdued global economy. On the outlook, the UNWTO confidence index projected the global international tourist arrivals to grow at the rate of 3 – 4 percent in 2020. However, these prospects are unlikely to be achieved given the impacts of COVID-19 pandemic, the Brexit and other global uncertainties. Meanwhile, earnings from tourism grew by 2.8 percent to USD 1,480.0 billion in 2019 from USD 1,454 billion in 2018.

In Tanzania, statistics from the Immigration Services Department show that the number of tourist arrivals increased to 1,527,230 in 2019, consolidating impressive performance in 2018 which recorded 1,505,702 arrivals. The modest growth corresponds to uncertainty surrounding the global economy.

Recent tourism developments in the United Republic of Tanzania

Several initiatives were recorded in 2019 that are supportive to tourism developments:

i. An online visa. The Government officially launched an “e-Immigration” service in November 2018. This digital solution is expected to ease issuance of entrance visa, and improve efficiency in revenue collection.

ii. MOU with Touch Road International Holdings Group to access Chinese market. Tanzania signed the MOU with China to market Tanzania’s tourist attractions in key Chinese cities of Guangzhou, Hong Kong, Chengdu and Beijing. This initiative targets to bring 10,000 visitors per year from China through the `Tour Africa – New Horizon` program and also open doors for tourists from the Far East.

iii. Southern Highland travel fair. Southern Highland regions jointly organized a tourism promotion platform known as “Karibu Kusini” Travel Expo in September 2019 in Iringa. The objective of the Expo is to diversify tourism attractions to the Southern Highlands which has varieties of unexploited tourism products including the country’s largest National Park - Ruaha, Africa‘s largest Game Reserve, Selous and world’s flower heaven at Kitulo.

iv. Chumbe Island Coral Park won the “BEST OF AFRICA” award as one of the world’s top 10 sustainable destinations for 2019. The award recognizes Chumbe’s innovation and best practices in marine, forest conservation and tourism management.

v. Serengeti National Park voted the best African Safari Park in 2019. After an extensive screening by SafariBookings.com, Serengeti National Park emerged the best out of five re-known Africa national parks. The award was a result of the Park’s high capacity of managing the reserve with variety of animals and a large number of tourists visiting annually.

vi. Six new national parks were established. In efforts to enhance conservation of biodiversity and tourism development in the country, six national parks were established. These are Burigi-Chato, Rumanyika-Karagwe, Ibanda-Kyerwa, Kigosi, Ugalla and Nyerere National Parks, and are expected to open up new tourism circuits.

vii. Inauguration of terminal III. The inauguration of terminal III at Julius Nyerere International Airport (JNIA) marks the Government’s plan to transform Tanzania into a regional hub and boost tourism and trade. The terminal has the capacity to park 19 large aircrafts at once, handle six million passengers per year and parking space for over 2,000 cars.

viii. Construction of Bikhole Tourism Centre. The Revolutionary Government of Zanzibar embarked on the construction of Bikhole Tourism Recreation Centre at Bungi near Bikhole historical building. The Centre is intended to create additional recreational activities such as botanic garden, culinary and gastronomy centre; heritage and cultural center; Kids Park, upscale heritage hotel reflecting the lifestyle of Bikhole; indoor restaurants and open-air food courts. The centre will have marina anticipated to accommodate 10 slips with docking capacity of 15 large yachts.

Main findings:

i. Tourism earnings sustained increasing trend, mainly associated with higher spending by holidaymakers under package tour arrangement. Tourism earnings rose by 7.9 percent to USD 2,604.5 million in 2019 from USD 2,412.3 million in 2018. This development was mainly driven by increased average expenditure per night and the length of stay. Leisure and holidays accounted for 90.1 percent of the total earnings, largely visitors under package tour travel arrangement from the United States of America, China, the United Kingdom, Canada and Norway.

ii. Some progress has been registered in diversifying tourism source markets with Europe remaining the dominant. The findings show new entrants to the top 15 source markets namely, Australia and Zimbabwe that replaced Switzerland and Belgium in the top 15 source markets in 2018. Europe remained the dominant, followed by the United States, Kenya and the United Kingdom.

iii. The majority of the visitors stayed between 8 to 14 nights, motivated by wide range of tourist attractions. The survey's results revealed that about 37.4 percent of all visitors stayed between 8 to 14 nights, exceeding 34.7 percent recorded in 2018, largely motivated by the country's unique nature and wide range of tourist attractions. The overall length of stay for visitors to Tanzania was 13 nights, exceeding 10 nights recorded in 2018.

iv. Most visitors came for leisure and holidays. Holidaymakers and leisure travellers accounted for 67.0 percent followed by those who came to visit friends and relatives and business purpose. The dominance of leisure and holidaymakers is largely attributed to the country's wide range of tourist attractions mainly wildlife which was the most attractive activity constituting 36.1 percent of the total visitors in 2019 compared with 35.8 percent in 2018.

v. Travel arrangement shifted to package tour, partly explained by affordable air travel due to decline in oil prices and improved air connectivity in many destinations. The non-package tour arrangement was dominant in four consecutive years, (2015-2018) except for 2019 whereby package tour was dominant.

vi. The use of electronic payments such as credit cards remained low. The results show that despite the ongoing initiatives to promote digital solutions, cash payments among tourists remain dominant at 87.5 percent while use of credit cards accounted for 12.2 percent of the respondents. This is partly explained by limited Internet connectivity and high surcharges.

vii. Youth and mid-aged (25-64) were the major visitors, same as the previous year. Most visitors were aged between 25 and 64 years, accounting for 81.1 percent of total visitors and mainly from the United States, United Kingdom and Germany. Similar pattern was observed in the preceding surveys. Meanwhile, the share of visitors aged below 18 and senior citizens remained low at 6 percent.

viii. On the demand side, visitors remain impressed with the country's attractiveness, characterized by rising share of first-time visitors. The leading impressive factors are friendly people, wildlife, scenic beauty and beaches. The first timers accounted for 61.1 percent of the interviewed visitors higher than 54 percent in 2018.

Policy recommendations

To further improve the performance of the tourism sector, more strategic involvement of key stakeholders in particular the Government, cannot be overemphasized. Prioritizing improvement of major infrastructure, tourist facilities as well as diversifying tourism products. This will increase the number of tourists from different parts of the world and their length of stay at destination Tanzania. The key policy issues and recommendations to be considered for improving the growth of the sector are summarized as follows:

1. Collaborative interventions are vital for promoting various attractions on offer together with making them increasingly affordable. This will consolidate notable progress registered in diversifying tourism products as well as increasing outreach to new source markets such as China. Nevertheless, the survey's findings show modest increase in the number of arrivals. This suggests that these initiatives are yet to unlock the country's tourism potential.

2. Equally important is the need to address visitors concerns such as enhancing customer services delivery conservation measures and leveraging on digital solution especially increasing acceptability of credit cards and availing ATM services in almost all tourist related areas. The findings indicate some pay-offs from the improved tourism facilities including accommodation services, restaurant, telecommunications, roads and air connectivity. These together with other factors contributed to 7 percent increase in tourism earnings.

3. Enhanced awareness and improved network infrastructure are vital in addressing some of the long standing problems. For instance, only 12.2 percent of visitors used credit cards as a mode of payment mainly due to limited Internet connectivity, high surcharge and safety consideration.

4. The share of under 18 was found to be very low. This suggests the need to explore kind of attractions that are suitable to this group. Sport tourism could be among the areas to be ventured on going forward.

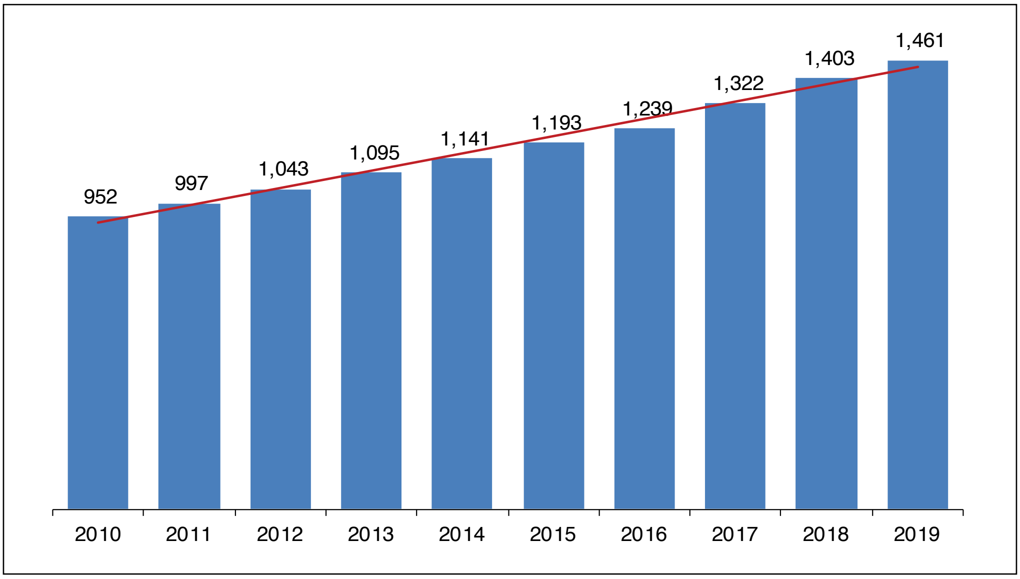
Chapter 1: Recent Developments in the Tourism Industry

1.1 Global Perspective

The UNWTO World Tourism Barometer (2020) indicates that international global tourist arrivals grew by 4 percent in 2019 reaching 1.5 billion; a year of another strong growth, although slower compared to the exceptional growth rate of 6 percent in 2018 (**Chart 1.1**). The growth was slower mainly in advanced economies, particularly Europe due to uncertainty surrounding Brexit, geopolitical and trade tensions, global economic slowdown, collapse of Thomas Cook – the world known tour operator and several low-cost airlines in Europe.

Chart 1.1: Global international tourist arrivals, 2010-2019

In millions



Source: UNWTO World Tourism Organization Barometer, Various Issues

All regions indicated an increase in international visitor arrivals with the Middle East enjoying the strongest growth of 8 percent, followed by Asia and the Pacific which grew by 5 percent. Arrivals in Europe and Africa recorded a growth rate of 4 percent, similar to the world average (**Table1.1**).

Table 1.1: International Tourist Arrivals by Regions, 2012-2019

	2012	2013	2014	2015	2016	2017	2018	2019
Arrivals (Million)								
Europe	541	567	580	605	619	677	716	742
East Asia and the Pacific	234	250	264	284	306	208	348	364
Americas	163	168	182	194	201	211	217	220
Africa	52	55	55	54	58	63	68	71
Middle East	51	49	55	57	56	58	59	64
Annual Growth (%)								
Europe	3.9	4.7	2.4	4.3	2.4	8.4	6.2	3.7
Asia and the Pacific	7.1	6.9	5.8	7.4	7.7	5.9	5.8	4.6
Americas	4.5	3.1	8.5	6.5	3.7	2.9	5.1	2.0
Africa	4.6	4.4	0.9	-3.1	7.7	7.8	8.1	4.2
Middle East	2.2	-3.0	12.8	2.9	-2.5	4.9	9.1	7.6

Source: UNWTO World Tourism Organization Barometer, Various Issues

Trends of market shares in the world indicate that Europe continues to take the largest share accounting for 50.8 percent, followed by the East Asia and the Pacific and Americas. Africa and Middle East accounted for the lowest share of below 5 percent (**Table 1.2**).

Table 1.2: Market Shares of International Tourist Arrivals, 2012-2019

Percent

Region	2012	2013	2014	2015	2016	2017	2018	2019
Europe	52	52.1	51.1	50.7	49.9	55.6	50.9	50.8
Asia and the Pacific	22.5	23	23.2	23.8	24.7	17.1	24.7	24.9
Americas	15.7	15.4	16	16.2	16.2	17.3	15.4	15
Africa	5.0	5.1	4.8	4.5	4.7	5.2	4.8	4.9
Middle East	4.9	4.5	4.8	4.8	4.5	4.8	4.2	4.4
World	100	100	100	100	100	100	100	100

Source: UNWTO World Tourism Organization Barometer, Various Issues

Based on the observed trends, economic prospects and UNWTO confidence index, international tourist arrivals are expected to grow by 3 to 4 percent in 2020. In Europe and Americas, UNWTO forecasts a small growth rate of 2 to 4 percent and that of Asia and the pacific, and the Middle East is projected at 5 to 6 percent and 4 to 6 percent, respectively (**Table 1.3**). However, these prospects are unlikely to be achieved given the impacts of COVID-19 pandemic, geopolitical tensions in Latin America and Brexit.

Table 1.3: International Tourist Arrivals - Actual Growth and Projection

Percent

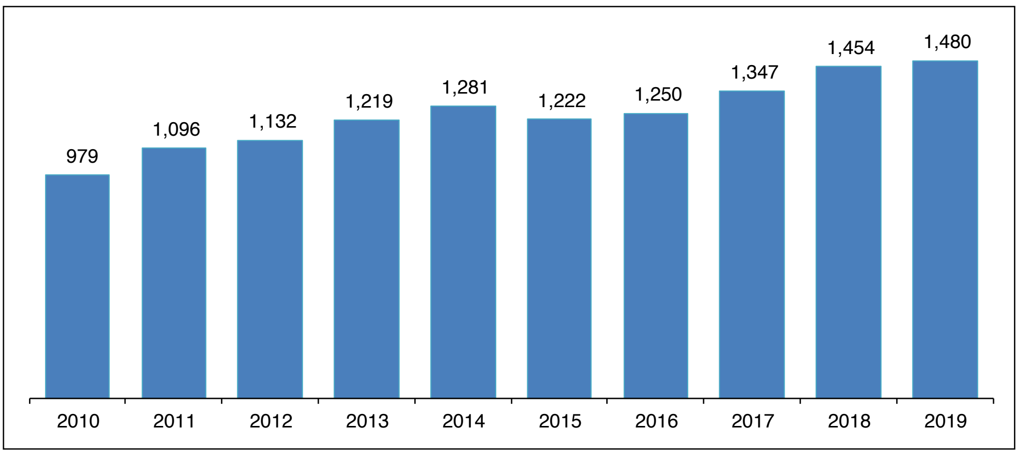
Region	Annual Change					Projections
	2015	2016	2017	2018	2019[p]	2020
World	4.7	3.8	7.2	5.6	3.8	3.0 - 4.0
Europe	4.7	2.0	8.8	5.8	3.7	3.0 - 4.0
Asia and the Pacific	5.4	7.7	5.7	7.3	4.6	5.0 - 6.0
Americas	6.0	3.7	4.7	2.4	2.0	2.0 - 3.0
Africa	-2.9	7.8	8.5	8.5	4.2	3.0 - 5.0
Middle East	4.0	-4.7	4.1	3.0	7.6	4.0 - 6.0

Source: UNWTO World Tourism Organization Barometer, January 2020: p = Provision

According to UNWTO Barometer, international tourism receipts grew by 2.8 percent to USD 1,480 billion in 2019 from USD 1,454 billion in 2018, the highest figure in history (Chart 1.2). Global export earnings from tourism, which includes passenger transport receipts USD 253 billion, reached USD 1,733 billion in 2019 – equivalent to seven percent of the world's total exports and 28 percent of global services exports. Notwithstanding, the good performance in 2019, international tourism receipts are projected to plunge to a range of USD 310-570 billion in 2020, representing a drop between 62 to 79 percent. This decline will put more than 100 million direct tourism jobs at risk particularly for economies, which are dependent on tourism activities including Small Island Developing States (SIDS) and countries with large tourism sectors.

Chart 1.2: International tourist earnings, 2010-2019

USD billions



Source: UNWTO World Tourism Organization Barometer, Various Issues

1.2 Tourism Development in Tanzania

1.2.1 Tourism Performance

Tourism in Tanzania continues to be among the key sectors in generating foreign exchange. In 2019 the sector generated USD 2,604.5 million, which is an increase of about 7.9 percent from USD 2,412.3 million collected in 2018. There was also an increase of 1.4 percent in the number of international arrivals from 1,505,702 in 2018 to 1,527,230 visitors in 2019.

1.2.2 Online Visa

The Government officially launched an "e-Immigration" service in November 2018 for foreign nationals wishing to visit or live in Tanzania. This involves an online application, which is reviewed and cleared after 48 hours. In case the application is successful, a document containing a bar code (Visa Grant Notice) to be presented at the point of entry is sent to the applicant. The initiative is aimed at enhancing efficiency in visa processing.

The Prime Minister of URT, Hon. Kassim Majaliwa cuts a ribbon to launch electronic visa and resident permit services, witnessed by Deputy Home Affair Minister Hamad Masauni (Right) and Commissioner General of Immigration Dr. Anna Makalala

1.2.3 Tanzania Signed MoU with Touch Road International Holdings Group

Tanzania is now targeting China as an emerging tourist source market after the traditional sources of Europe, North America and South Africa. Consequently, a memorandum of understanding (MOU) was signed with Touch Road International Holdings Group of China in 2019 to market Tanzania's tourist attractions in key Chinese cities of Guangzhou, Hong Kong, Chengdu and Beijing. The signing came after engaging in a series of tourism fairs and exhibitions in China aimed at marketing Tanzania's tourist attractions mainly wildlife, white sand beaches and historical sites. Accordingly, Tanzania has been recognized and approved by China National Tourism Administration as among the countries worth visiting by Chinese holidaymakers. This initiative is targeted to bring 10,000 visitors per year from China through the `Tour Africa – New Horizon` program and also expected to open doors for tourists from the Far East.

Signing of MOU between Tanzania and China

1.2.4 Karibu Kusini Travel Fair

The Regional Administrative Secretaries from seven Southern Highland regions jointly organized a tourism promotion platform known as "Karibu Kusini" Travel Expo in September 2019 in Iringa. The objective of the Expo is to diversify tourism attractions to the southern circuit which has varieties of tourism products including the country's largest National Park - Ruaha, Africa's largest Game Reserve, Selous and world's flower heaven Kitulo. Karibu Kusini Travel Expo makes the fourth international tourism show in Tanzania after KILI Fair, which takes place every June, Swahili International Expo (S!TE), every October and Zanzibar Tourism Show.

1.2.5 Chumbe won the "BEST OF AFRICA" award

Chumbe Island Coral Park won the "BEST OF AFRICA" award as one of the world's Top 10 Sustainable Destinations for 2019. The award was unveiled in a high profile ceremony at Internationale Tourismus-Borse Berlin (ITB) on the 6th March 2019. The 10 destinations were selected by a jury representing 12 different international organizations, who reviewed a total of 100 top destinations globally. The award recognizes Chumbe's innovation and best practices in marine, forest conservation and tourism management.

1.2.6 Serengeti National Park voted the best African Safari Park in 2019

The World Trade Awards (WTA) voted the Serengeti National Park as the best African Safari Park in 2019 for its stunning tourist attractions as well as service delivery. The voting was held at Sugar Beach-Sun Resort in Mauritius after an extensive screening by SafariBookings.com. The award was a result of the Park's high capacity of managing the reserve with variety of animals and large number of tourists visiting annually. The competition involved other African reserves namely the Central Kalahari (Botswana), Etosha (Namibia), Kidepo (Uganda), Kruger (South Africa) and Maasai Mara (Kenya). Serengeti National Park is the second tourist attraction in Tanzania to get the WTA awards, after Mount Kilimanjaro, which received WTA award in the category of "Africa's leading tourist attraction" in 2013, 2015, and 2018.

1.2.7 Establishment of six National Parks

In efforts to enhance conservation of biodiversity and tourism development in the country, six national parks were established. These are Burigi-Chato, Rumanyika-Karagwe, Ibanda-Kyerwa, Kigosi, Ugalla and Nyerere National Parks and are expected to open up new tourism circuits. The Parks are typical grassland area of the African Savannah in the pictorial beauty of the lakes and rivers and a home to a wide collection of wildlife, including the African elephant, buffaloes, antelopes, lions, leopards, zebras, giraffes and chimpanzees and some rare species of birds and fish. It is worth noting that the Burigi-Chato National Park was inaugurated by H.E. Dr. John Pombe Magufuli, the President of the United Republic of Tanzania in July 2019. The special feature about the Park is the presence of the world's largest antelopes.

H.E. Dr. John Pombe Magufuli, the President of the United Republic of Tanzania inaugurating the Burigi - Chato National Park in July 2019

1.2.8 Inauguration of terminal III

The inauguration of terminal III at Julius Nyerere International Airport (JNIA) marks the Government's plan to transform Tanzania into a regional hub and boost tourism and trade. The terminal has the capacity to park 19 large aircrafts at once, handle six million passengers per year and can park over 2,000 cars.

New Terminal III at Julius Nyerere International Airport (JNIA)

1.2.9 Establishment of Pemba Tourisports Bonanza 2019

This is a one week tourism Bonanza scheduled to take place annually in the last week of August in Pemba Island. The Bonanza is for showcasing traditional activities in Pemba and involves activities such as traditional bullfighting, send-off of donkey parade, double outrigger race, marathon, swimming competition and bicycle race. Other activities at the Bonanza are traditional outdoor cooking, donkey racing; creativity and innovation show; the Kojani Island sailing, Kayaking Festival; the Tumbe canoe race festival; the Nasheed and Duffu competition. The Bonanza ends with football tournament.

1.2.10 Construction of Bikhole Tourism Centre

The Revolutionary Government of Zanzibar embarked on the construction of Bikhole Tourism Recreation Centre at Bungi near Bikhole historical building. The Centre is intended to create additional recreational activities such as botanic garden, culinary and gastronomy centre; heritage and cultural center; kids park, upscale heritage hotel reflecting the lifestyle of Bikhole; indoor restaurants and open air food courts. The centre will have a marina anticipated to accommodate 10 slips with docking capacity of 15 large yachts.

Bikhole Recreational Tourism Centre at Burigi

1.2.11 TANAPA and NCAA mark 60 years of conservation success

Tanzania National Parks (TANAPA) and Ngorongoro Conservation Area Authority (NCAA) with the leading tourist attraction hotspots in Africa celebrated 60 years of milestone in conservation of wildlife and nature in 2019. TANAPA and NCAA represent the highest level of resource protection and have become the leading tourist selling point for Tanzania, making tourism an important sector of the economy for development. Above all, success in wildlife conservation set a solid foundation for re-thinking and re-positioning the national parks management globally. TANAPA and NCAA acknowledge the role played by the community towards conservation and therefore uses different approaches including education to the surrounding communities on the usefulness of the conservation of wildlife.

VICE President, H.E. Samia Suluhu Hassan inspecting the parade of honour marking the 60 years of TANAPA and NCAA, 2019

Chapter 2: Analysis of the Survey's Results

2.0 Introduction

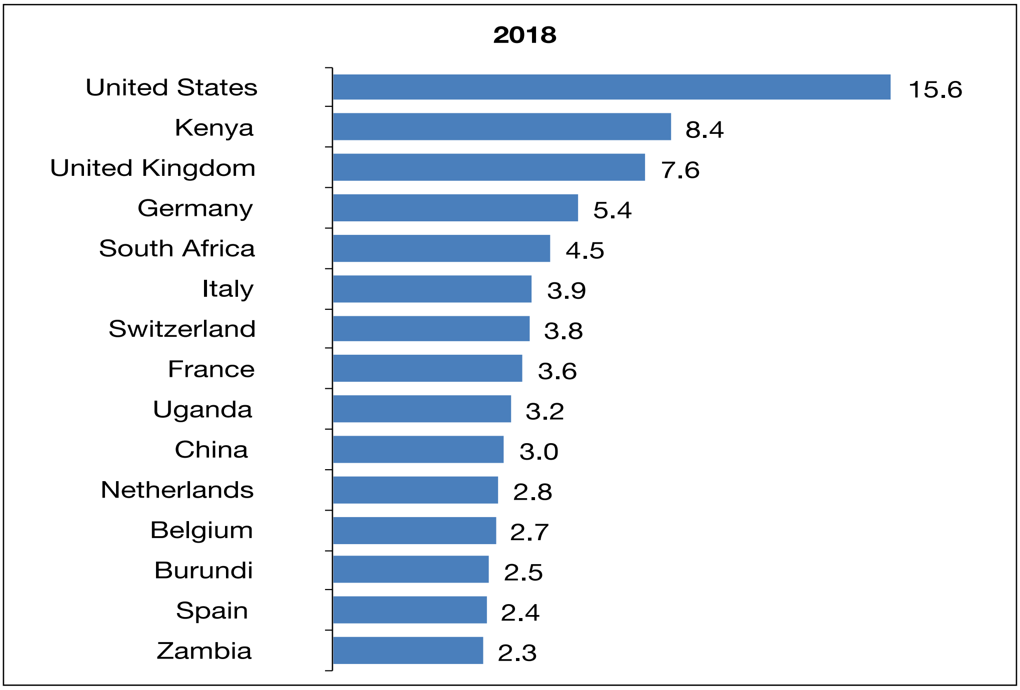
This chapter presents the main findings of the international visitors' exit survey, which was conducted during the tourist peak season from 5th to 17th August 2019. The objectives of the survey were, among other things to obtain reliable information on demographic characteristics of the visitors, purpose of visit and expenditure pattern.

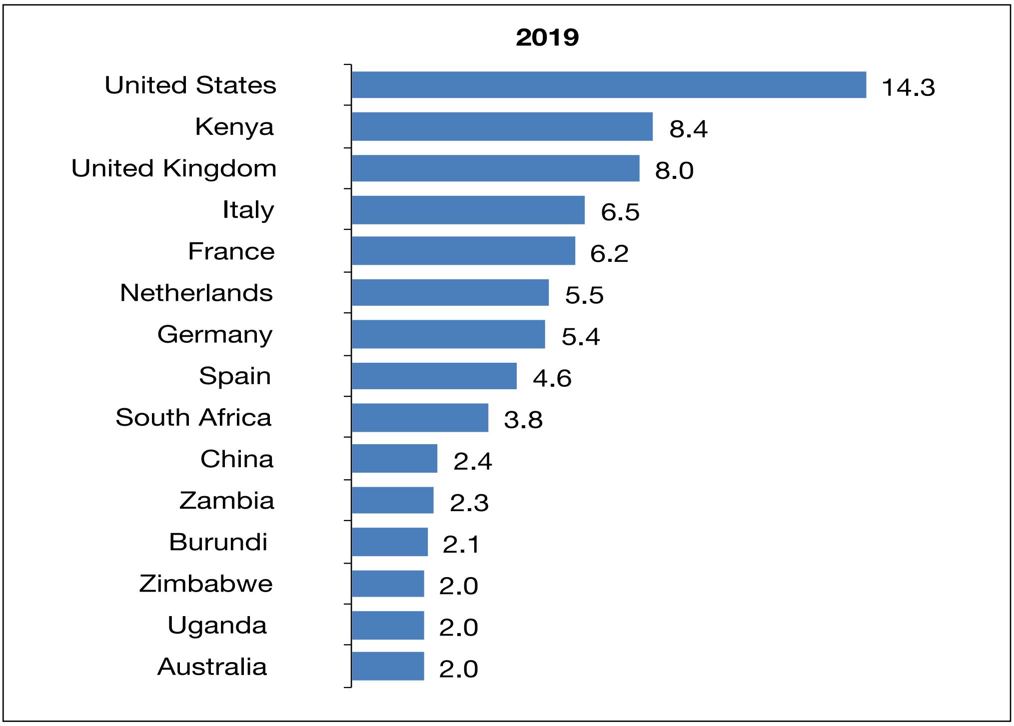
2.1 Source Markets

The survey's findings show that, 75.5 percent of international tourist arrivals in 2019 came from the top 15 source markets compared to 71.7 percent in 2018. The majority of visitors were from the United States of America, Kenya and the United Kingdom (**Chart 2.1**). The top 15 source markets recorded new entrants namely, Australia and Zimbabwe that replaced Switzerland and Belgium in the top 15 source markets in 2018.

Chart 2.1: Top 15 Source Markets for the URT, 2018 and 2019

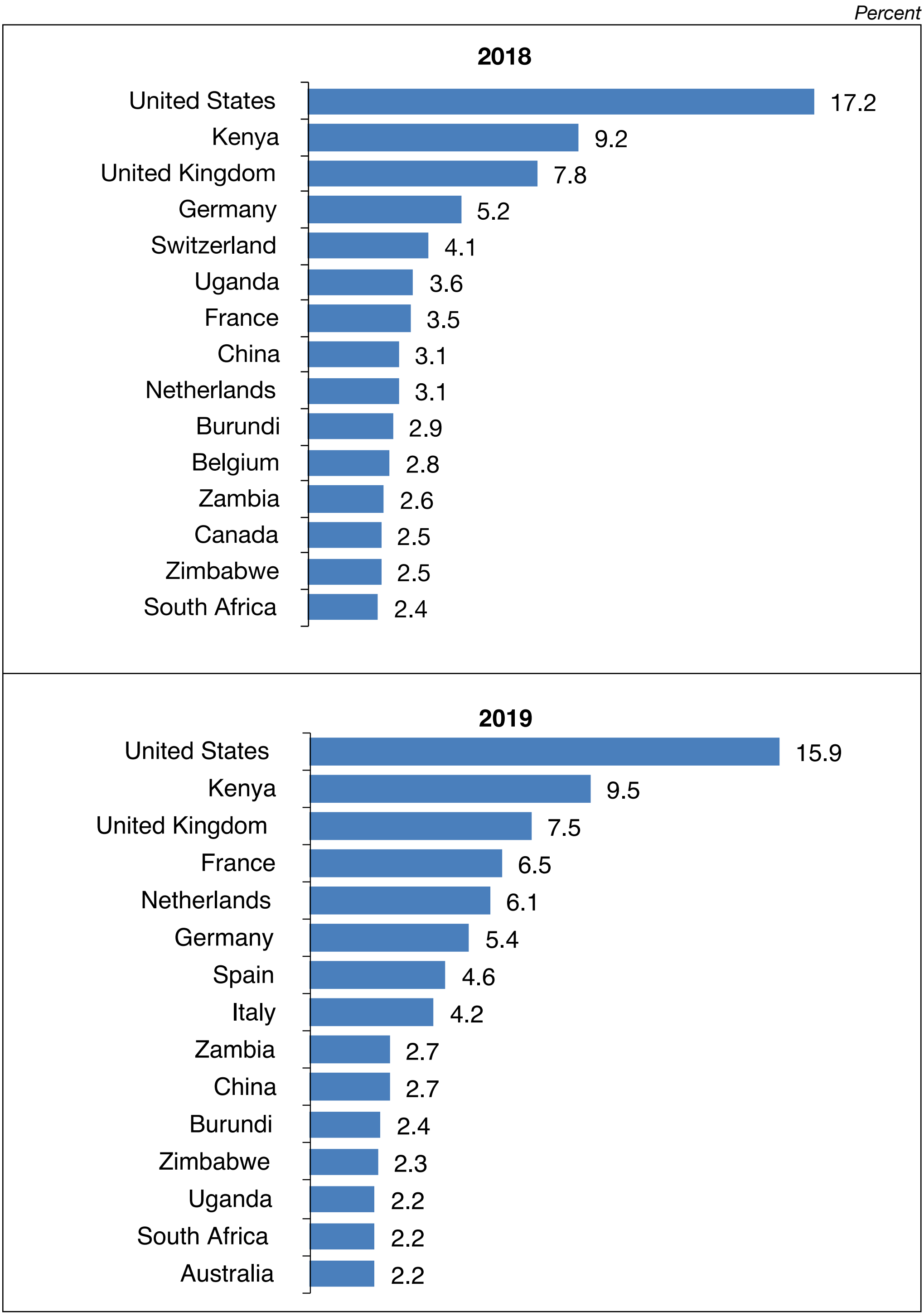
Percent





In Tanzania Mainland, the top 15 source markets accounted for 76.4 percent in 2019 compared to 72.5 percent in 2018. The leading source markets were the United States of America, Kenya and United Kingdom (**Chart 2.2**). The new entrants into the top source markets were Spain, Italy and Australia replacing Switzerland, Belgium and Canada.

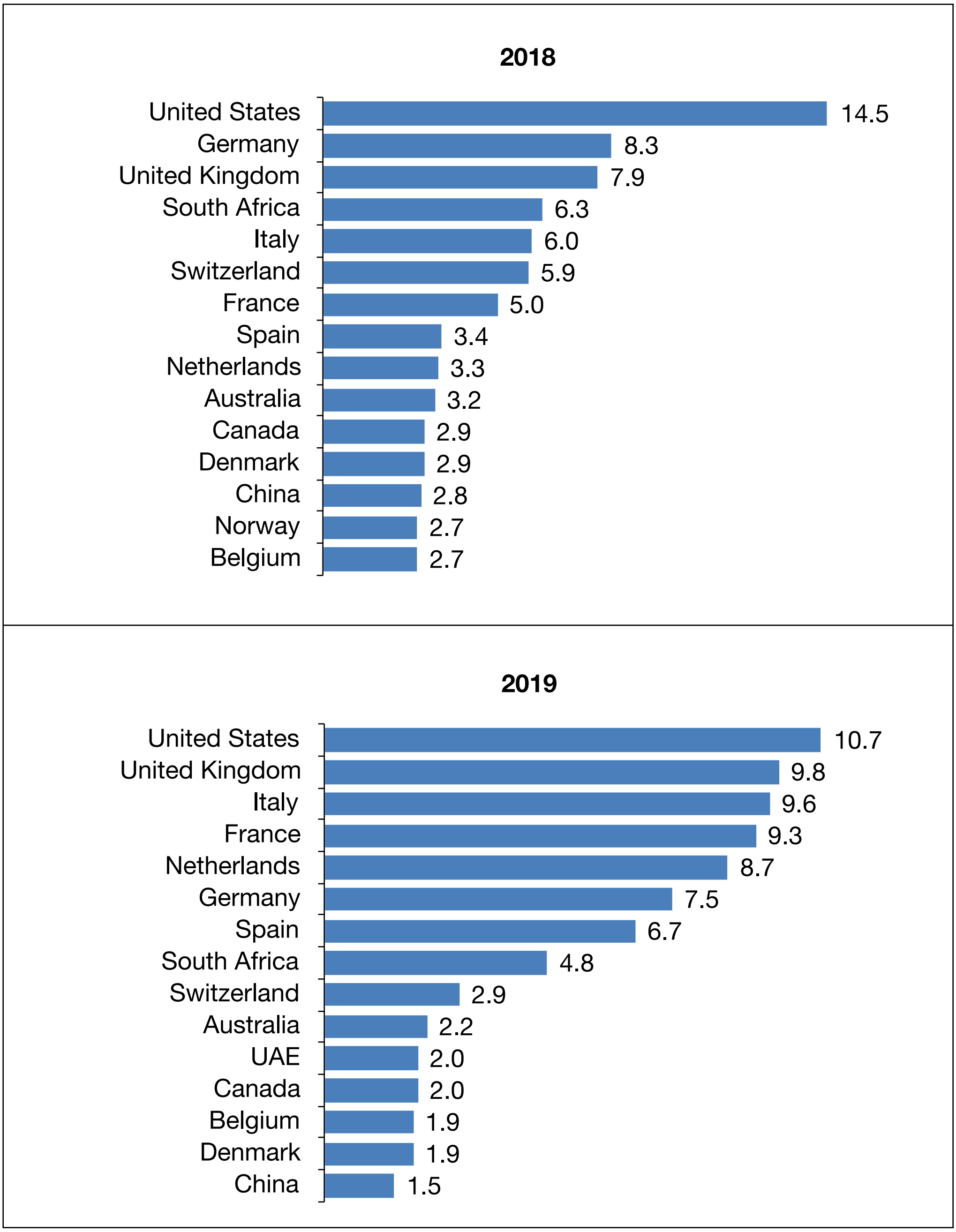
Chart 2.2: Top 15 Source Markets for Tanzania Mainland, 2018 and 2019



In Zanzibar, the top 15 source markets accounted for 81.5 percent in 2019 compared to 77.8 percent in 2018, with the United Arab Emirates replacing Norway on the list (**Chart 2.3**).

Chart 2.3: Top 15 Source Markets for Zanzibar, 2018 and 2019

Percent



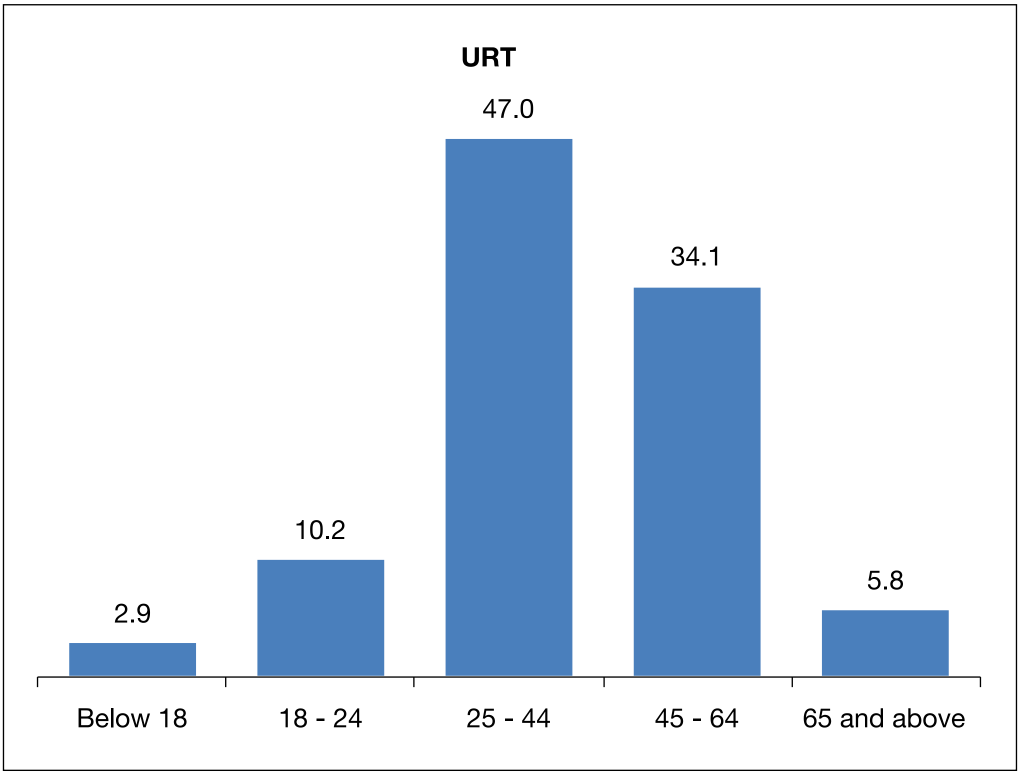
The source markets in both the Mainland and Zanzibar have remained broadly the same in 2019 and accounted for more than 70.0 percent of total visitors. This implies that there is a need to diversify the source markets by intensifying promotional efforts in other countries while maintaining the current top source markets.

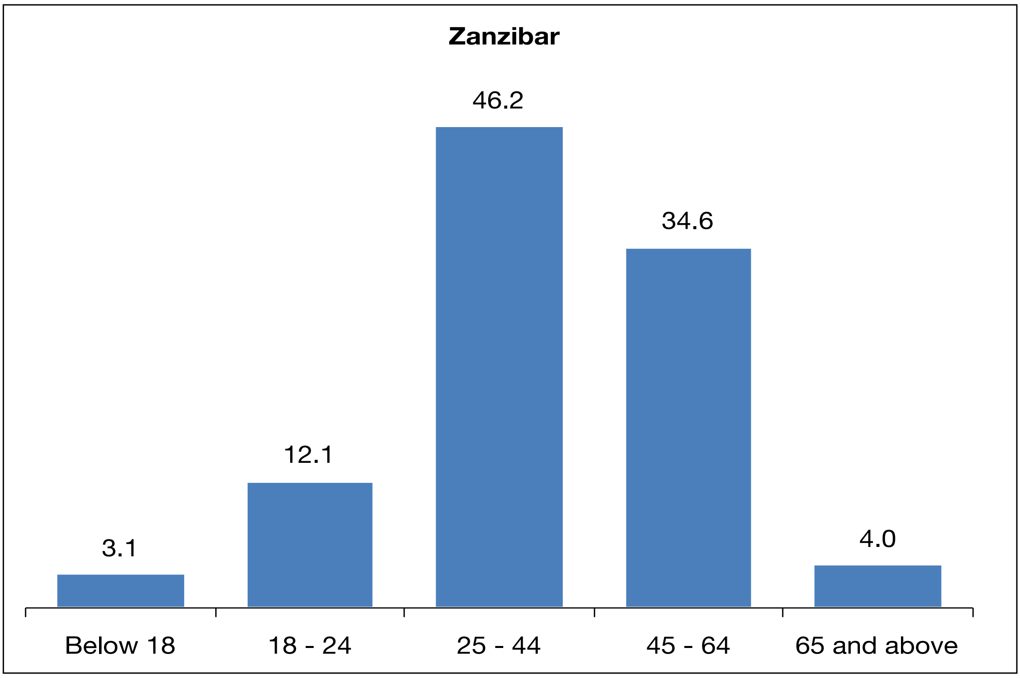
2.2 Age group

Most visitors were aged between 25-64 years, accounting for 81.1 percent of total visitors. Visitors aged below 18 accounted for the smallest share. Similar pattern was observed in the preceding surveys. The same pattern was observed in Zanzibar (**Chart 2.4**).

Chart 2.4: Distribution of Visitors by Age Group, URT and Zanzibar, 2019

Percent





The majority of visitors under the age group 25-44 came from Kenya, the United States and Italy. Visitors of the age group 45-64 years mainly came from the United States, United Kingdom and Germany. Senior citizens mainly came from the United States of America (**Table 2.1**).

Table 2.1: Distribution of top 15 Source Markets by Age Group, URT 2019

Percent

Country of residence	Age group				
	Below 18	18 - 24	25 - 44	45 - 64	65 and above
United States	11.9	16.2	9.1	16.3	45.0
Kenya	9.0	8.5	9.9	6.9	2.4
United Kingdom	19.1	10.2	4.9	7.2	4.3
Italy	5.3	5.4	7.7	6.8	2.2
France	9.0	6.2	5.7	6.3	2.0
Netherlands	12.1	7.4	2.3	6.7	2.6
Germany	5.2	5.4	4.1	7.2	5.9
Spain	3.1	4.6	6.0	4.2	0.9
South Africa	1.0	2.3	5.0	4.3	3.3
China	1.8	2.3	2.9	2.3	1.3
Zambia	0.2	1.2	4.0	1.6	0.3
Burundi	1.2	2.3	3.1	1.3	0.4
Zimbabwe	0.2	1.1	3.9	1.0	0.2
Uganda	0.6	1.0	3.2	1.6	0.8
Australia	0.4	1.1	1.4	2.7	7.9
Others	19.8	24.7	26.7	23.7	20.7
Total	100.0	100.0	100.0	100.0	100.0
Number of visitors	2,925	2,728	8,975	6,151	1,199

The majority of visitors in the age group of 25-44 came from Italy and the United States, while those in the group of 45-64 mainly came from the Netherlands and Italy (Table 2.2).

Table 2.2: Distribution of top 15 Source Markets by Age Group, Zanzibar 2019

Percent

Country of residence	Age group				
	Below 18	18 - 24	25 - 44	45 - 64	65 and above
United States	9.0	12.1	8.9	9.7	37.9
United Kingdom	19.1	12.0	6.1	9.7	4.9
Italy	7.0	7.9	11.6	9.9	3.1
France	11.8	8.2	9.1	9.5	3.6
Netherlands	17.5	10.3	3.4	11.4	3.4
Germany	6.7	7.5	6.8	8.9	7.3
Spain	3.2	6.4	9.4	5.5	2.1
South Africa	1.5	2.3	6.2	5.4	8.1
Switzerland	3.4	3.1	2.3	3.5	0.5
Australia	0.4	1.6	1.8	3.3	7.5
United Arab Emirates	1.0	1.5	3.3	1.2	0.3
Canada	0.9	1.2	2.4	2.3	3.6
Belgium	3.1	2.5	1.2	2.1	1.0
Denmark	1.7	4.0	1.6	1.5	2.1
China	1.0	1.7	1.6	1.6	1.3
Others	12.4	17.7	24.2	14.6	13.2
Total	100.0	100.0	100.0	100.0	100.0
Number of visitors	1,562	1,463	4,125	2,812	385

In terms of travel arrangement in the URT, visitors of the age between 18 and 44 years mainly came under the non-package tour arrangement, while those below 18 and above 44 years preferred the package tour arrangement (**Chart 2.5**). For the case of Zanzibar, the majority of visitors under all age groups came under the package tour arrangement (**Chart 2.6**).

Chart 2.5: Tour Arrangement by Age Group, URT 2019

Percent

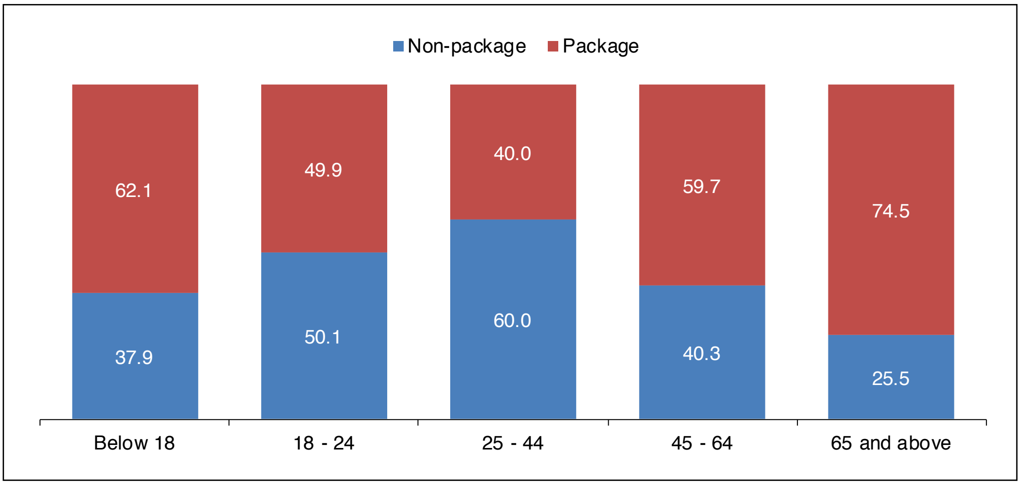
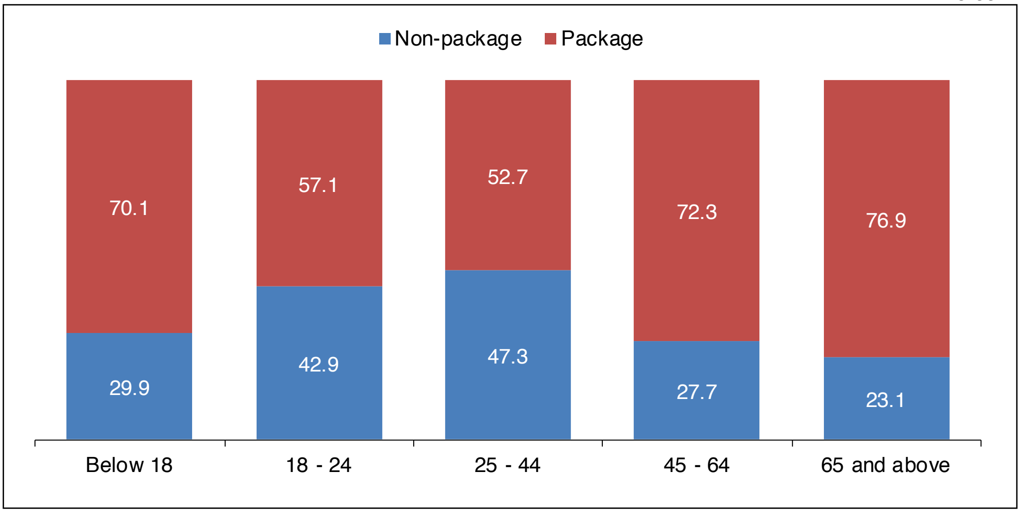


Chart 2.6: Tour Arrangement by Age Group, Zanzibar 2019

Percent



The majority of visitors under all age groups came for leisure and holidays and to visit friends and relatives. Visitors who came for medical treatment were the least (**Table 2.3**). Likewise, in Zanzibar, most visitors under all age groups came for leisure and holidays (**Table 2.4**). The dominance of visitors who came for leisure and holidays is largely attributed to the country's unique nature and wide range of tourist attractions.

Table 2.3: Age Group and Purpose of Visit, URT 2019

Percent

Age group	Purpose of visit									
	Business	Leisure and holidays	Medical treatment	Meetings and conference	Religion	Scientific and academic	Visiting friends and relatives	Volunteering	Others	Total
Below 18	0.6	72.2	0.2	1.1	0.6	2.7	18.3	3.8	0.5	100.0
18-24	3.1	64.2	0.6	0.6	1.8	2.8	18.7	5.7	2.5	100.0
25-44	10.7	60.6	0.8	3.6	1.0	0.9	17.2	1.3	4.0	100.0
45-64	4.7	74.3	0.5	3.6	1.0	0.5	12.7	1.3	1.4	100.0
65 and above	1.2	78.3	0.2	1.8	2.3	0.3	11.6	2.6	1.8	100.0
Total	7.0	67.0	0.6	3.1	1.2	1.0	15.5	1.9	2.7	100.0

Table 2.4: Age Group and Purpose of Visit in Zanzibar, 2019

Percent

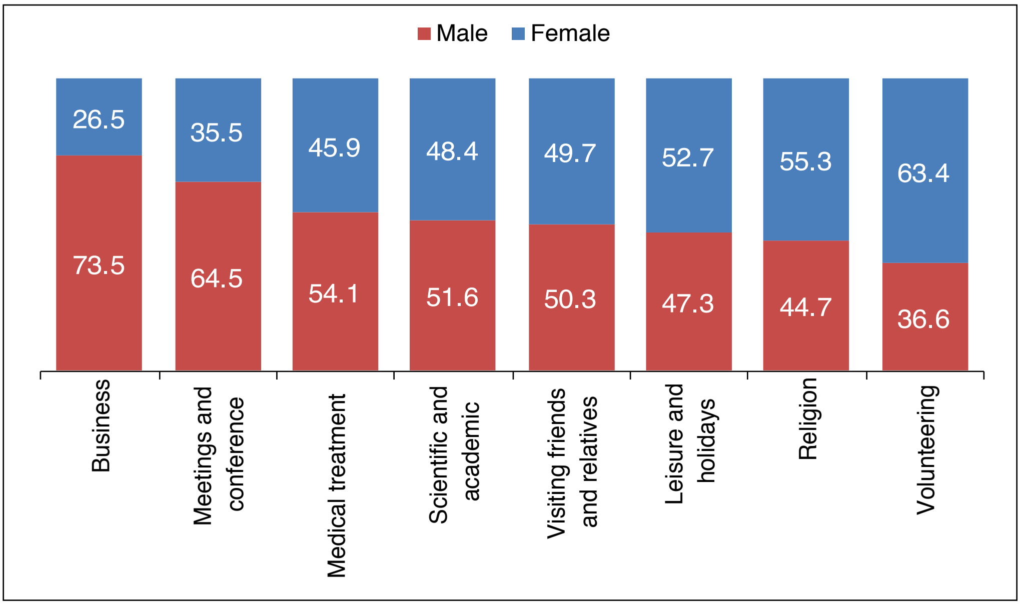
Age group	Purpose of visit									
	Business	Leisure and holidays	Medical treatment	Meetings and conference	Religion	Scientific and academic	Visiting friends and relatives	Volunteering	Others	Total
Below 18	0.0	84.3	0.0	1.9	0.3	4.1	7.2	2.2	0.0	100.0
18-24	1.0	81.7	0.7	0.4	0.1	2.9	8.0	5.2	0.0	100.0
25-44	1.2	88.4	0.6	1.4	0.1	0.5	5.5	1.5	0.8	100.0
45-64	0.5	90.3	0.3	1.3	0.1	0.2	6.0	0.8	0.6	100.0
65 and above	0.5	85.0	0.0	0.5	3.9	0.5	9.2	0.0	0.5	100.0
Total	0.9	88.0	0.4	1.2	0.2	0.8	6.2	1.7	0.6	100.0

2.3 Gender

In 2019, the distribution of visitors by gender was similar to the previous years' survey results with male visitors accounting for 50.3 percent of all visitors, while female visitors accounted for 49.7 percent. Female visitors mainly came for leisure and holidays, volunteering and religious purposes while male visitors were dominant in business and meeting and conference (**Chart 2.7).**

Chart 2.7: Gender by Purpose of Visit, URT

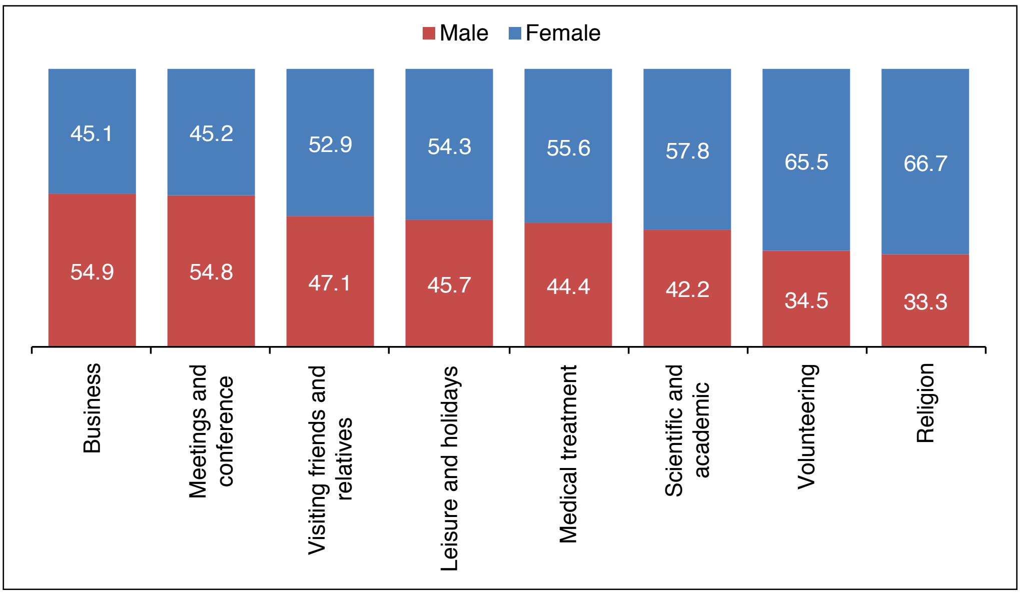
Percent



In Zanzibar female visitors were dominant accounting for 54.3 percent. Male visitors mainly came for business and meetings and conference, while female visitors mainly came for leasure and holidays, religion and volunteering purposes (**Chart 2.8**).

Chart 2.8: Gender by Purpose of Visit, Zanzibar

Percent

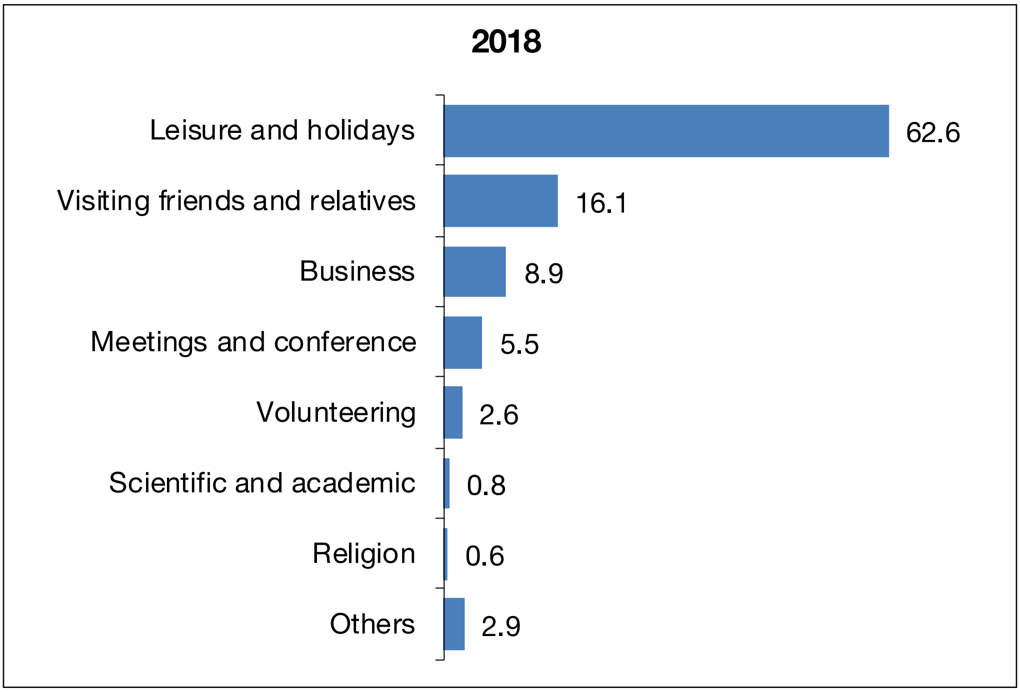


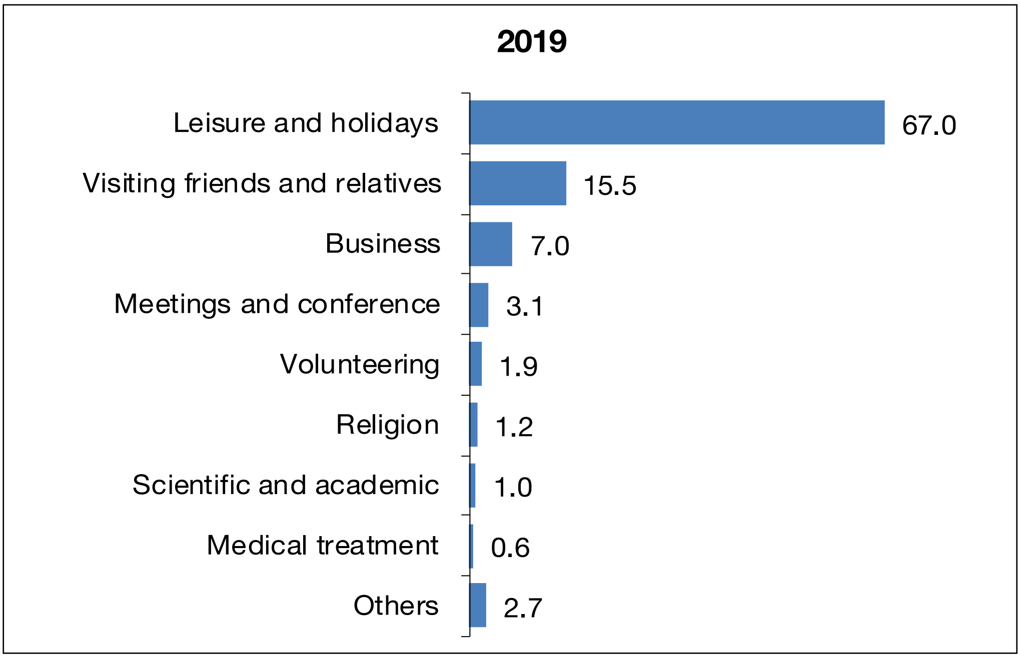
2.4 Purpose of Visit

Most visitors in 2019 came for leisure and holidays accounting for 67.0 percent, followed by those who came to visit friends and relatives and business (**Chart 2.9**). Similar trend was observed in 2018. The dominance of leisure and holidays is largely attributed to the country's wide range of tourist attractions, which include, wildlife, beautiful white sandy beaches, historical sites and mountain climbing.

Chart 2.9: Purpose of Visit, United Republic of Tanzania, 2018 and 2019

Percent





The United States was the leading source of market for visitors who came for leisure and holidays, followed by the United Kingdom, Italy and France. Visitors who mainly came to visit friends and relatives came from Kenya, the United Kingdom and Burundi, while those who came for business were mainly from Zambia, Zimbabwe and Kenya (**Table 2.5**).

Table 2.5: Distribution of Top 15 Source Markets by Purpose of Visit, URT

Percent

	Purpose of visit									
Country of residence	Business	Leisure and holidays	Medical treatment	Meetings and conference	Religion	Scientific and academic	Visiting friends and relatives	Volunteering	Other	Total
United States	3.8	16.4	8.3	7.2	17.6	20.4	9.7	34.2	8.5	14.3
Kenya	9.4	1.6	5.3	20.1	47.1	9.0	27.8	0.0	38.3	8.4
United Kingdom	1.5	8.7	3.8	2.8	0.4	18.1	9.9	11.8	1.2	8.0
Italy	0.5	8.7	1.5	1.2	6.3	0.5	2.0	8.4	1.7	6.5
France	0.8	8.3	13.5	1.5	0.0	0.5	2.2	3.1	0.3	6.2
Netherlands	0.5	7.5	2.3	1.5	0.4	0.9	1.8	2.4	0.7	5.5
Germany	0.5	6.6	4.5	2.2	1.6	11.3	3.1	8.0	2.2	5.4
Spain	0.3	6.4	5.3	0.9	0.0	2.3	0.4	5.8	2.7	4.6
South Africa	5.5	3.7	6.0	15.3	11.4	2.3	1.2	0.2	3.7	3.8
China	2.1	2.8	3.8	2.5	0.0	1.4	1.6	0.5	0.3	2.4
Zambia	21.6	0.2	0.8	3.2	3.1	1.4	1.3	0.0	11.0	2.3
Burundi	3.7	0.1	3.8	1.0	1.2	4.1	9.8	0.2	4.3	2.1
Zimbabwe	19.5	0.5	0.8	4.7	0.8	2.3	1.1	0.5	0.5	2.0
Uganda	3.7	0.6	1.5	5.1	3.9	5.9	5.9	0.2	6.5	2.0
Australia	0.3	2.7	0.0	0.3	0.8	0.5	0.7	1.7	0.0	2.0
Other	26.2	25.1	39.1	30.7	5.5	19.5	21.6	22.9	18.3	24.4
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

In Zanzibar, 88.0 percent of visitors came for leisure and holidays and were mainly from Italy, the United States, France and the United Kingdom. Visitors whose purpose of visit was scientific and academic came from the United Kingdom, while Germany led in volunteering purpose (**Chart 2.10** and **Table 2.6**).

Chart 2.10: Purpose of Visit Zanzibar, 2018 and 2019

Percent

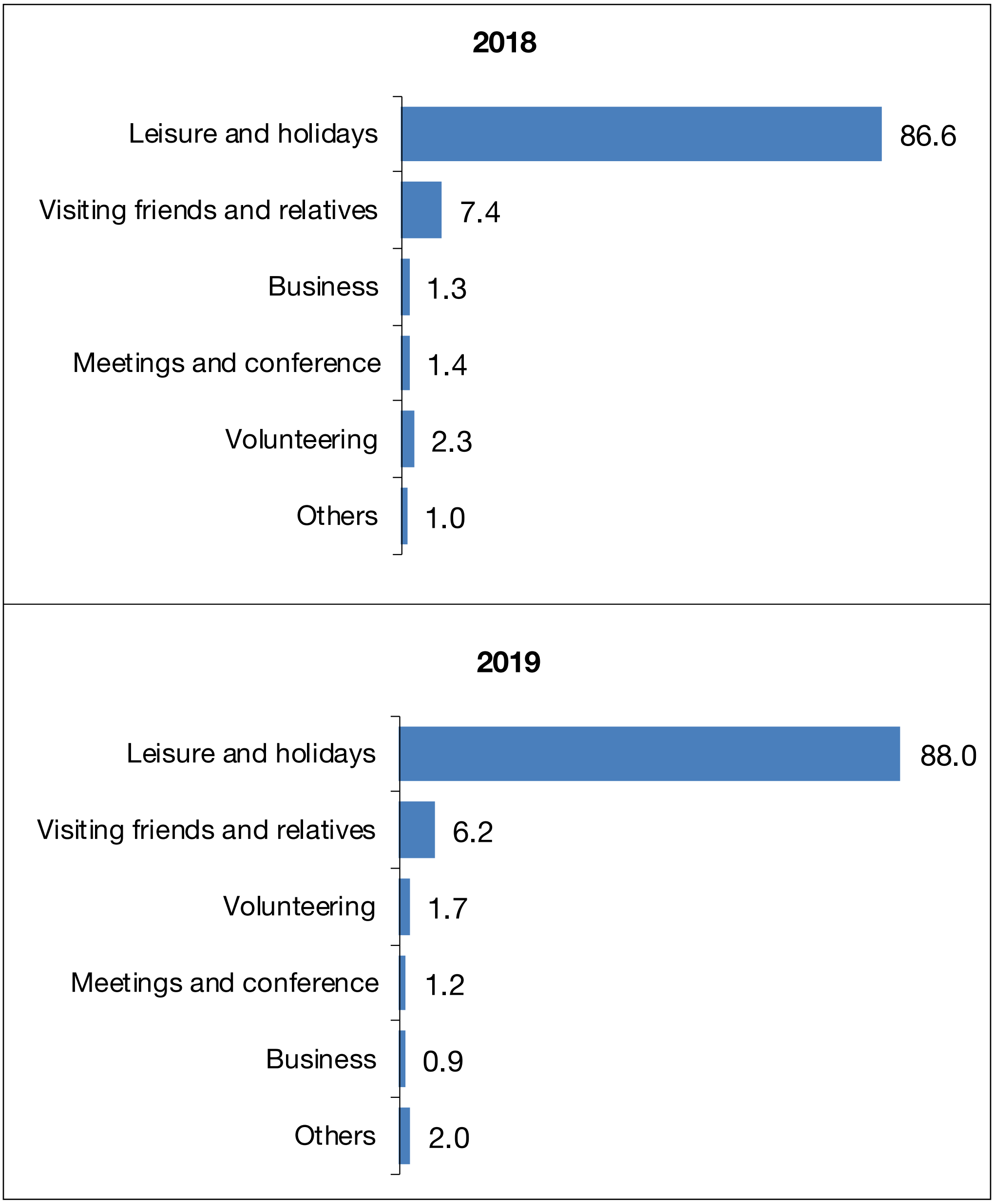


Table 2.6: Distribution of Top 15 Source Markets by Purpose of Visit, Zanzibar

Percent

Country of residence	Purpose of visit									
	Business	Leisure and holidays	Medical treatment	Meetings and conference	Religion	Scientific and academic	Visiting friends and relatives	Volunteering	Other	Total
United States	16.5	10.1	6.7	7.1	66.7	9.6	11.9	19.5	38.3	10.7
United Kingdom	3.3	9.3	0.0	2.4	4.2	34.9	18.0	9.2	5.0	9.8
Italy	0.0	10.2	0.0	2.4	0.0	0.0	6.4	9.2	13.3	9.6
France	0.0	9.9	24.4	3.2	0.0	1.2	4.7	6.9	0.0	9.3
Netherlands	2.2	9.3	0.0	4.8	0.0	2.4	4.9	3.4	1.7	8.7
Germany	2.2	7.3	6.7	2.4	16.7	22.9	7.2	14.9	13.3	7.5
Spain	2.2	7.3	4.4	4.8	0.0	3.6	0.8	4.6	3.3	6.7
South Africa	11.0	5.0	15.6	6.3	0.0	4.8	1.6	0.6	1.7	4.8
Switzerland	0.0	3.1	0.0	0.0	0.0	0.0	1.7	2.3	0.0	2.9
Australia	0.0	2.3	0.0	0.8	0.0	0.0	0.9	4.0	0.0	2.2
United Arab Emirates	2.2	1.9	0.0	0.0	0.0	0.0	4.7	1.7	5.0	2.0
Canada	7.7	1.7	11.1	0.8	0.0	7.2	4.7	2.3	0.0	2.0
Belgium	1.1	2.1	0.0	0.0	0.0	0.0	0.9	0.0	0.0	1.9
Denmark	0.0	1.9	11.1	0.0	0.0	1.2	2.7	0.0	0.0	1.9
China	1.1	1.4	0.0	2.4	0.0	3.6	3.3	0.6	0.0	1.5
Other	50.5	17.1	20.0	62.7	12.5	8.4	25.7	20.7	18.3	18.5
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

2.5 Travel Arrangement

The package tour is the most preferred travel arrangement for visitors to URT (**Chart 2.13**). Visitors from long-haul source markets such as Netherlands, Italy, Australia, Spain, France and the United States, mainly came under the package arrangement **(Table 2.7**). Visitors from Burundi, Zambia, Zimbabwe, Uganda and Kenya ranked higher in the non-package travel arrangement.

Table 2.7: Top 15 Source Markets by Travel Arrangement, URT

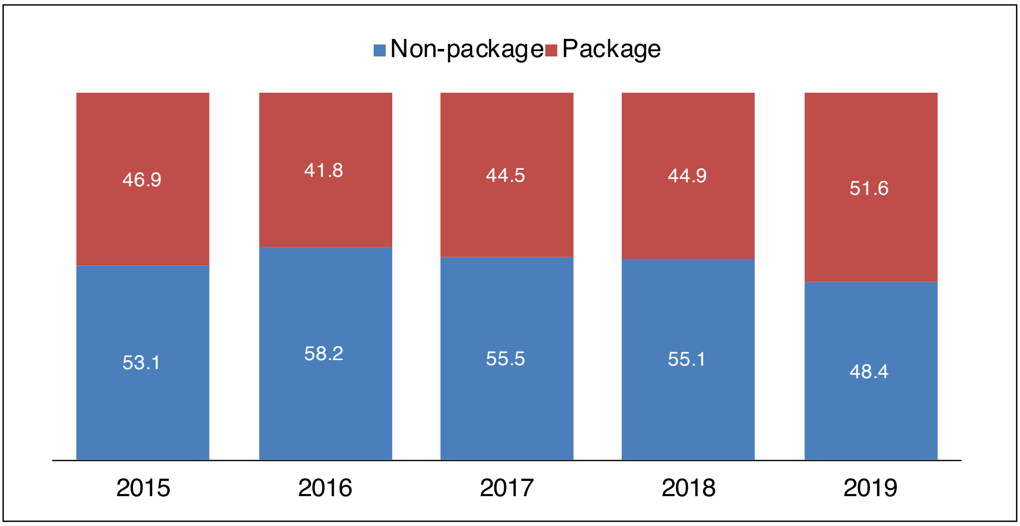
Percent

Country of residence	Tour arrangement		
	Non-package	Package	Total
United States	37.7	62.3	100.0
Kenya	95.8	4.2	100.0
United Kingdom	50.5	49.5	100.0
France	36.1	63.9	100.0
Germany	41.2	58.8	100.0
Italy	36.0	64.0	100.0
Netherlands	31.2	68.8	100.0
Spain	31.9	68.1	100.0
South Africa	59.2	40.8	100.0
Zambia	98.9	1.1	100.0
Burundi	99.5	0.5	100.0
Zimbabwe	96.2	3.8	100.0
Australia	30.3	69.7	100.0
Uganda	93.1	6.9	100.0
China	42.4	57.6	100.0

The non-package tour arrangement was dominant in four consecutive years (2015-2018), except for 2019 whereby package tour was dominant (**Chart 2.11**).

Chart 2.11: Visitors by Tour Arrangement, URT

Percent



In Zanzibar, the findings indicate that 62.2 percent of visitors came under the package tour arrangement. The leading source markets under package tour arrangement were Spain and the United States. With respect to the non-package tour arrangement, the leading countries were Belgium, Australia, Denmark and the Netherlands (**Table 2.8**).

Table 2.8: Top 15 Source Markets by Travel Arrangement, Zanzibar

Percent

Country of residence	Travel arrangement		
	Non-package	Package	Total
United Kingdom	53.4	46.6	100.0
United States	48.5	51.5	100.0
Italy	57.8	42.2	100.0
France	58.3	41.7	100.0
Netherlands	60.0	40.0	100.0
Germany	51.7	48.3	100.0
Spain	40.8	59.2	100.0
South Africa	55.1	44.9	100.0
Switzerland	55.2	44.8	100.0
Australia	68.8	31.3	100.0
United Arab Emirates	51.6	48.4	100.0
Canada	50.0	50.0	100.0
Belgium	80.0	20.0	100.0
Denmark	66.7	33.3	100.0
China	53.3	46.7	100.0

2.6 First-Time and Repeat Visits

The survey results indicate that 61.1 percent of the interviewed visitors were first timers compared to 54.0 percent in 2018. About 58.2 percent of first timers came under the package tour arrangement, whereas the majority of the repeat visitors came under the non-package tour arrangement (**Chart 2.12**).

Chart 2.12: First-time and Repeat Visitors

Percent

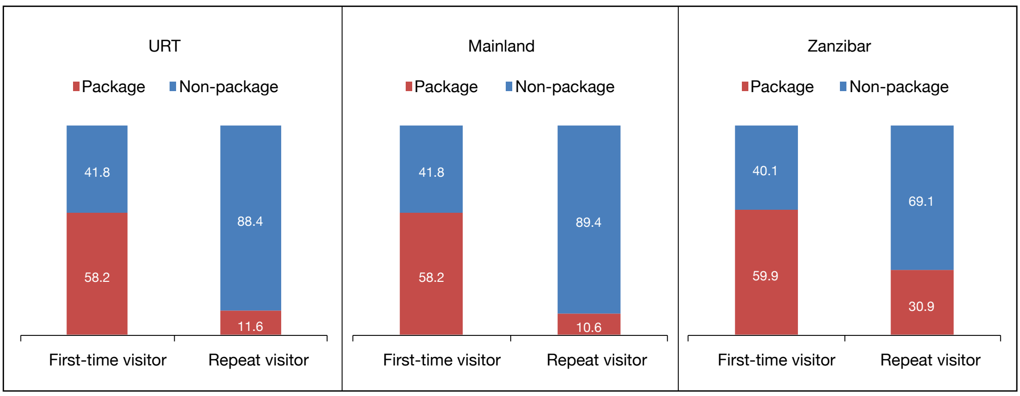
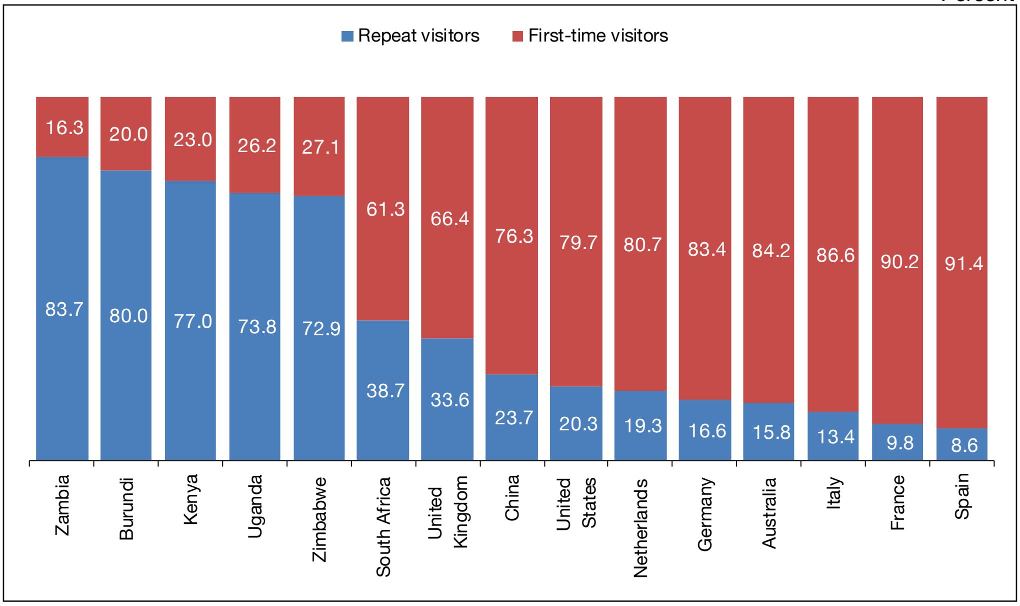


Chart 2.13 shows that the majority of visitors from the top 15 source markets were first-time visitors mainly from Spain, France, Italy, Australia, Germany, Netherlands, USA, China and the United Kingdom. Conversely, repeat visitors mainly came from the neighbouring countries associated with proximity and business interactions in line with regional integration initiatives.

Chart 2.13: First-time and Repeat Visitors by Top 15 Source Markets, URT

Percent



The main purposes of visit for first-time visitors were leisure and holidays, medical treatment, scientific and academic purposes, while the repeat visitors mainly came for business, visiting friends and relatives and for meetings and conference (**Table 2.9**).

Table 2.9: First-time and Repeat Visitors by Purpose of Visit, URT

Percent

Purpose of visit	Repeat visitors	First-time visitors	Total
Business	77.1	22.9	100.0
Leisure and holidays	14.1	85.9	100.0
Medical treatment	33.1	66.9	100.0
Meetings and conference	57.9	42.1	100.0
Religion	50.2	49.8	100.0
Scientific and academic	46.5	53.5	100.0
Visiting friends and relatives	72.0	28.0	100.0
Volunteering	18.6	81.4	100.0
Other	65.7	34.3	100.0

The majority of tourists who visited Zanzibar in the top 15 source markets came for the first-time (**Chart 2.14**). Most of both first-time and repeat visitors came to Zanzibar for leisure and holiday and visiting friends and relatives (**Table 2.10**).

Chart 2.14: First-time and Repeat Visitors by Top 15 Source Markets, Zanzibar

Percent

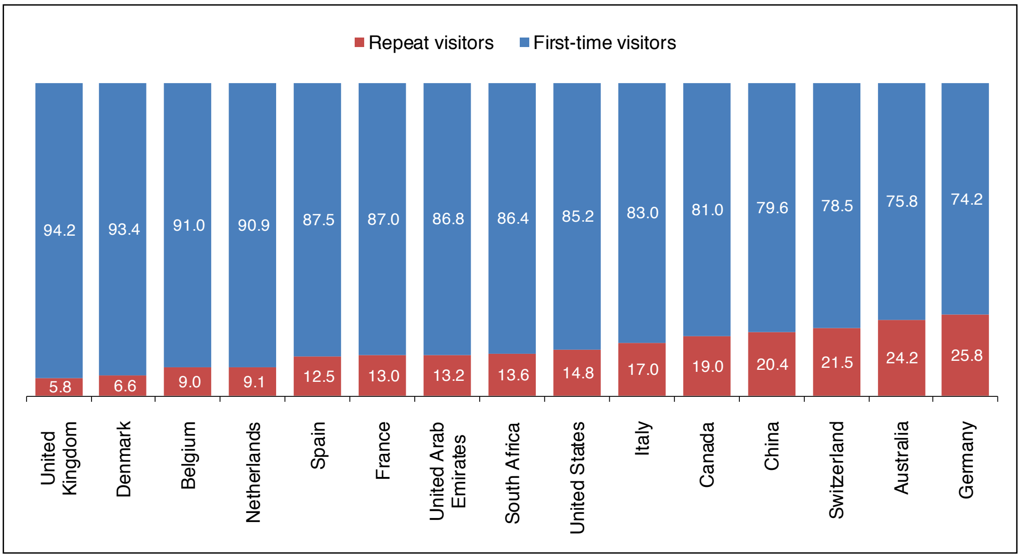


Table 2.10: First-time and Repeat Visitors by Purpose of Visit, Zanzibar

Percent

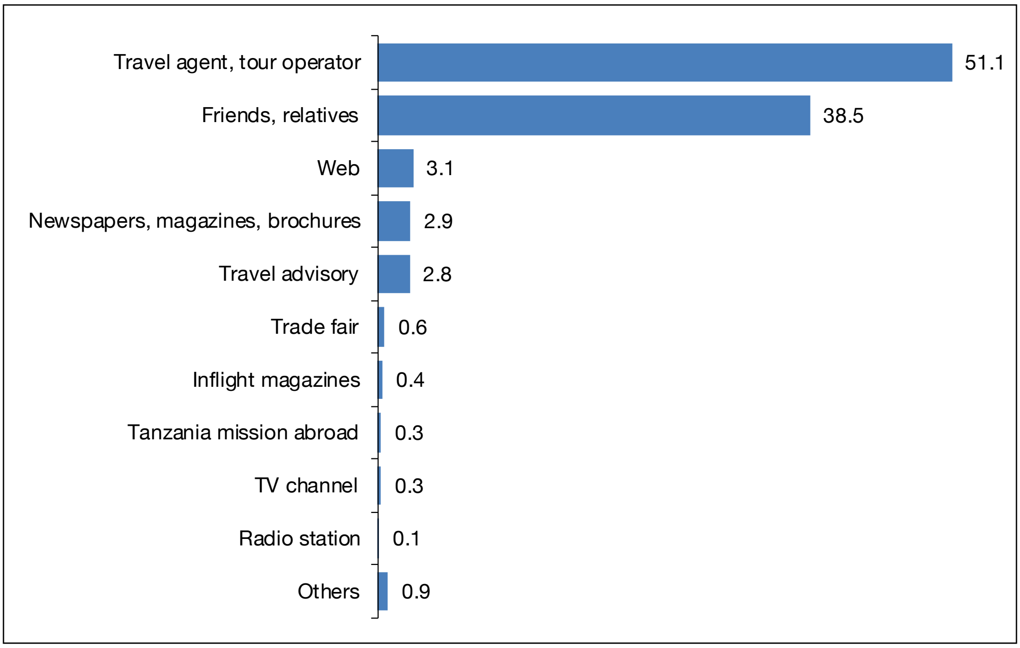
Purpose of visit	Repeat visitors	First-time visitors	Total
Business	39.1	60.9	100.0
Leisure and holidays	10.8	89.2	100.0
Medical treatment	0.0	100.0	100.0
Meetings and conference	40.4	59.6	100.0
Religion	16.7	83.3	100.0
Scientific and academic	27.6	72.4	100.0
Visiting friends and relatives	54.6	45.4	100.0
Volunteering	12.2	87.8	100.0
Other	36.0	64.0	100.0

2.7 Source of Information

Chart 2.15 shows that, friends and relatives, travel agents and tour operators were the major source of information about tourist attractions. Other important sources of information were Internet, newspapers, magazines and television. Less than one percent of the visitors heard about tourist attractions in Tanzania through trade fairs and missions abroad.

Chart 2.15: Source of Information About Destination Tanzania

Percent



2.8 Travel Party

Visitors who travelled alone took the lead followed by those who travelled with spouse, friends and relatives (**Chart 2.16).** In Zanzibar, visitors who came with spouses dominated followed by those travelled alone. Visitors who came with parents were the least (**Chart 2.17**).

Chart 2.16: Travel Party, URT

Alone 52.0%	With Spouce 19.3%	With other friends, relatives 12.8%	With Spouce and Children 8.9%	With children 4.4%	With parents 2.6%

Chart 2.17: Travel Party, Zanzibar

Alone 26.2%	With Spouce 31.2%	With other friends, relatives 17.7%	With Spouce and Children 15.3%	With children 5.7%	With parents 3.9%

2.9 Nights spent and Length of stay

2.9.1 Length of Stay

The overall average length of stay for visitors to the URT was 13 nights. Over the past seven years, the average length of stay for visitors to the URT was 10 nights. Visitors from long-haul source markets like China, the United Kingdom, Germany, Netherlands and the United States stayed longer compared to visitors from African countries such as Kenya, South Africa, Zambia, Burundi, Zimbabwe, and Uganda (**Table 2.11**). Visitors who came to visit friends and relatives stayed an average of 12 nights and those who came for business and holidaymakers stayed an average of 11 nights.

Table 2.11: Length of Stay by Purpose of Visit and top 15 Source Markets, URT

Percent

Country of residence	Purpose of visit					
	Business	Leisure and holidays	Medical treatment	Visiting friends and relatives	Other	Average
United States	12	15	9	16	20	14
Kenya	5	5	8	6	9	7
United Kingdom	18	19	6	17	24	17
Italy	7	15	6	13	15	11
France	7	12	12	13	22	13
Netherlands	11	13	7	17	25	15
Germany	9	15	10	16	28	16
Spain	21	12	9	23	31	19
South Africa	10	8	6	10	9	9
China	26	10	4	16	35	18
Zambia	5	5	5	7	6	6
Burundi	7	7	7	6	36	13
Zimbabwe	8	4	4	7	6	6
Uganda	8	6	21	7	20	12
Australia	14	13	0	12	26	13
Average	**11**	**11**	**8**	**12**	**21**	**13**

The overall average length of stay in Zanzibar was 5 nights similar to what was observed in the past seven years. Visitors from Italy, France and Spain stayed the longest with an average length of stay of 7 nights each (**Table 2.12**).

Table 2.12: Length of Stay by Purpose of Visit and top 15 Source Markets, Zanzibar

Percent

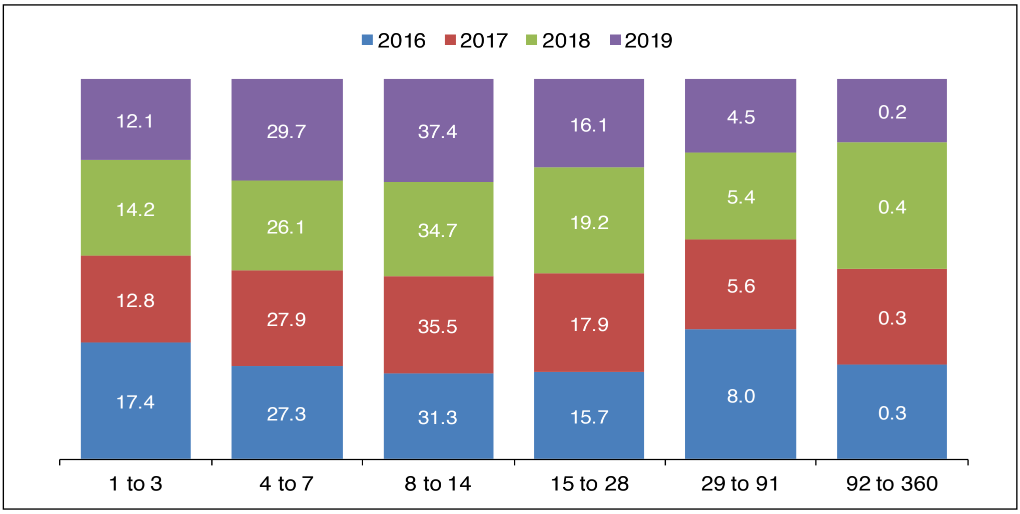
Country of residence	Purpose of visit				
	Business	Leisure and holidays	Visiting friends and relatives	Other	Average
United States	3	4	4	6	4
United Kingdom	5	8	7	5	6
Italy	6	8	8	4	7
France	7	6	8	6	7
Netherlands	4	6	3	4	4
Germany	3	7	5	5	5
Spain	9	5	9	4	7
South Africa	3	6	5	5	5
Switzerland	0	7	8	7	6
Australia	2	5	6	3	4
United Arab Emirates	0	5	13	3	5
Canada	2	4	3	5	4
Denmark	0	8	8	8	6
Belgium	10	6	9	0	6
China	8	4	4	2	5
Average	**4**	**6**	**7**	**4**	**5**

2.9.2 Nights Spent

More than one-third (37 percent) of visitors spent between 8 and 14 nights, followed by those visitors who stayed between 4 and 7 nights. In total, about two-third of visitors spent between 4 and 14 nights in Tanzania. The survey findings for the past 4 years revealed a similar pattern with increased number of visitors staying longer (**Chart 2.18)**.

Chart 2.18: Distribution of Visitors by Night Spent, URT

Percent



Most visitors who came for business stayed between 1 and 7 nights; leisure and holidays 4 and 14 nights; visiting friends and relatives 1 and 14 nights while those who came for meetings and conferences spent between 1 and 7 nights (**Table 2.13**).

Table 2.13: Distribution of Visitors by Nights Spent and Purpose of Visit, URT

Percent

Night spent	Business	Leisure and holidays	Visiting friends and relatives	Meetings and conference	Religion	Scientific and academic	Volunteering	Other
1 to 3	36.8	4.7	25.0	31.4	24.7	9.5	4.1	27.0
4 to 7	32.6	29.8	23.6	44.1	43.9	19.9	13.3	44.9
8 to 14	19.0	45.4	22.8	15.6	12.9	28.5	36.4	19.2
15 to 28	5.5	18.3	15.7	5.4	9.8	19.0	20.2	4.6
29 to 91	5.8	1.7	12.5	3.4	8.6	21.3	24.1	4.2
92 to 360	0.3	0.1	0.4	0.1	0.1	1.8	1.9	0.1
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

For the case of Zanzibar, the majority of visitors (57.8 percent) stayed in the country for 8 - 14 nights, followed by those who stayed between 14 and 28 nights. In comparison with the previous surveys, similar pattern was observed with increased proportion of visitors staying longer (**Chart 2.19** and **Table 2.14**).

Chart 2.19: Distribution of Visitors by Nights Spent, Zanzibar

Percent

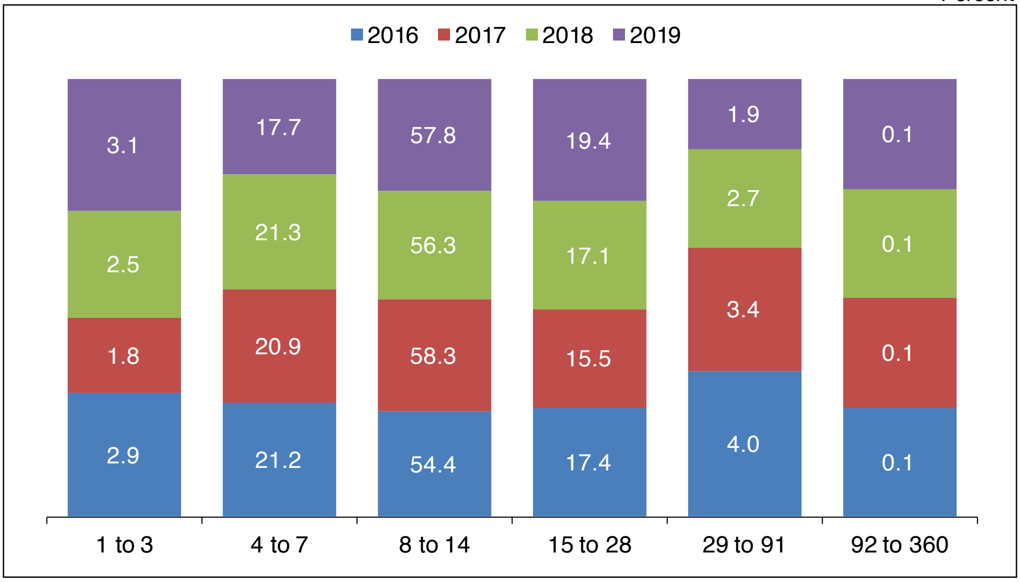


Table 2.14: Distribution of Visitors by Nights Spent and Purpose of Visit, Zanzibar

Percent

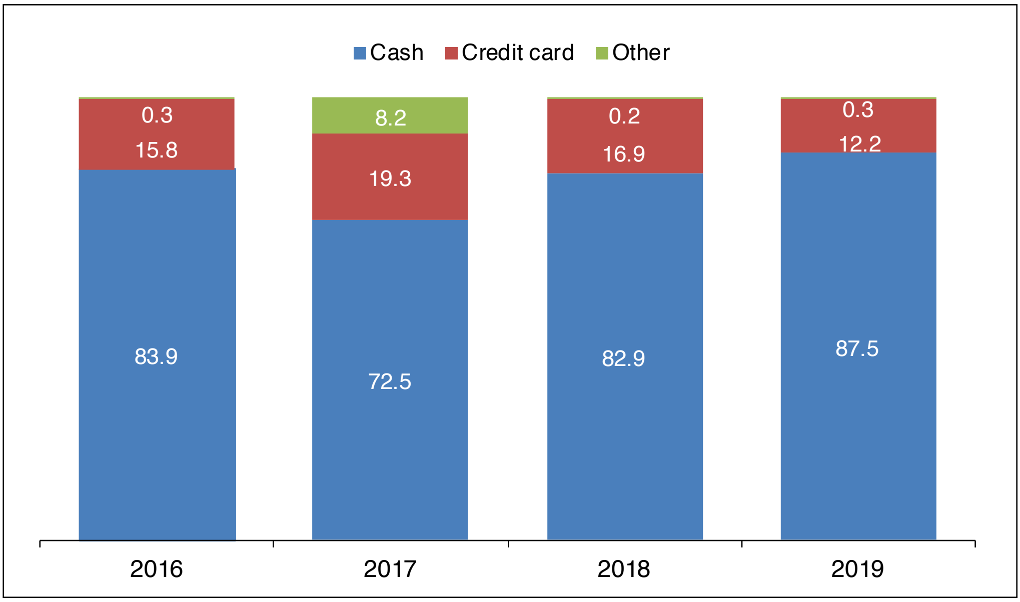
Nights spent	Business	Leisure and holidays	Visiting friends and relatives	Meetings and conference	Religion	Scientific and academic	Volunteering	Other
1 to 3	15.6	1.1	11.6	15.9	0	0	0.6	6.7
4 to 7	32.2	16	29.4	30.2	66.7	39.8	29.5	18.1
8 to 14	26.7	60.9	31.9	39.7	25	25.3	47.4	43.8
15 to 28	14.4	19.6	17.4	14.3	8.3	31.3	20.2	24.8
29 to 91	4.4	2.3	9.1	0	0	3.6	2.3	6.7
92 to 360	6.7	0.1	0.6	0	0	0	0	0
Total	100	100	100	100	100	100	100	100

2.10 Mode of payment

Cash continued to be the major mode of payment in Tanzania, partly due to limited awareness and availability of point of sale terminals at most consumption points. However, the use of credit cards has been gaining importance over the recent years (**Chart 2.20**).

Chart 2.20: Mode of Payment, URT

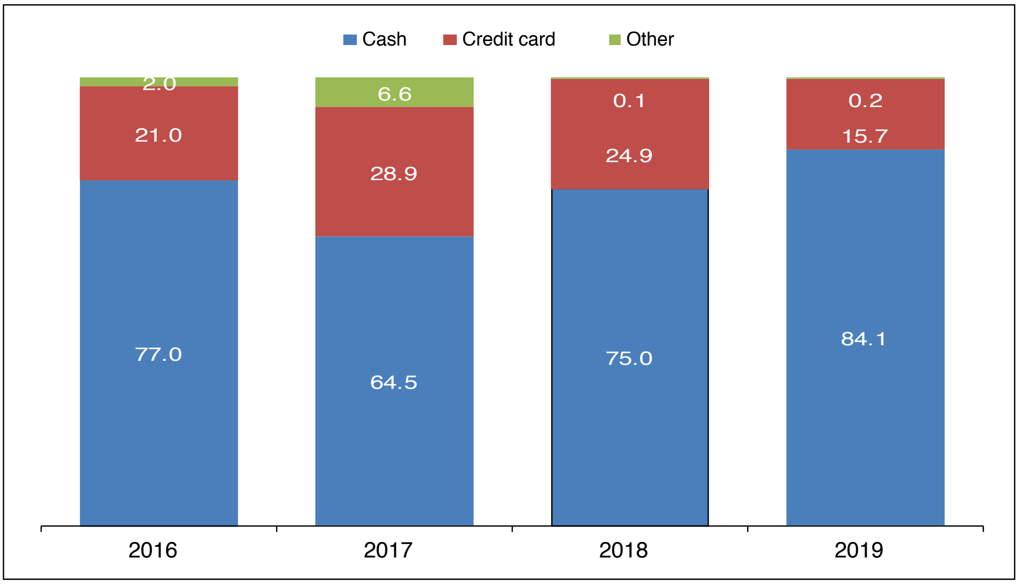
Percent



In Zanzibar, similar pattern was observed whereby cash payment was dominant followed by the use of credit card. Wide use of cash payments partly reflects the cash economy (**Chart 2.21**).

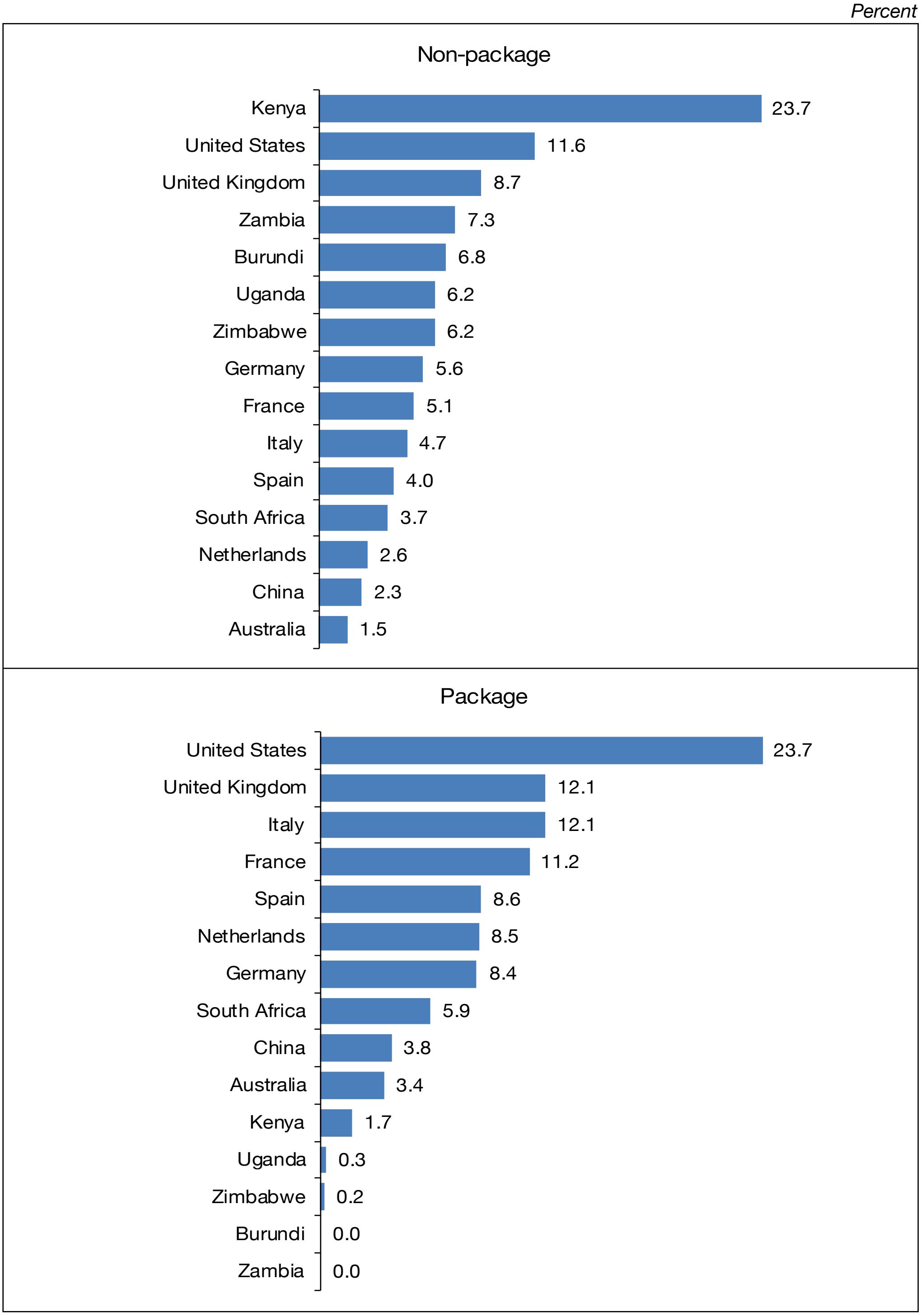
Chart 2.21: Mode of Payment, Zanzibar

Percent



Cash payments were prominent in both package and non-package tour arrangement. The United States, United Kingdom, Italy and France accounted for about 59.1 percent of the visitors who settled their bills with cash under the package tour arrangement. Meanwhile, Kenya accounted for closer to one-quarter of visitors who used cash payment under the non-package tour arrangement (**Chart 2.22**).

Chart 2.22: Cash Payment by Tour Arrangement for top 15 Source Markets, 2019



2.11 Main tourism activity

Wildlife continued to be the most attractive activity in Tanzania, constituting 36.1 percent of the total visitors in 2019 compared with 35.8 percent in 2018 (**Chart 2.23**). About half of the interviewees visited Ngorongoro, Serengeti and Tarangire. The prominence of Ngorongoro is consistent with its peculiar attractions and a gateway to Serengeti National Park and one of Tanzania's most popular wildlife viewing areas. The crater has a permanent supply of water, which draws thousands of animals that stay in this area rather than migrating. Stone Town was also a prominent activity and its peculiarity comes from its grand old Arabian homes lining the narrow streets and winding alleys. Most homes were built in the 19th Century with little changes over the last 200 years, which makes it the world's oldest functioning Swahili city. The most visited attractions by tourists are shown in **Chart 2.24**. The other prominent tourism activities were visiting friends and relatives, beach tourism and mountain climbing.

Chart 2.23: Main Tourism Activities in URT

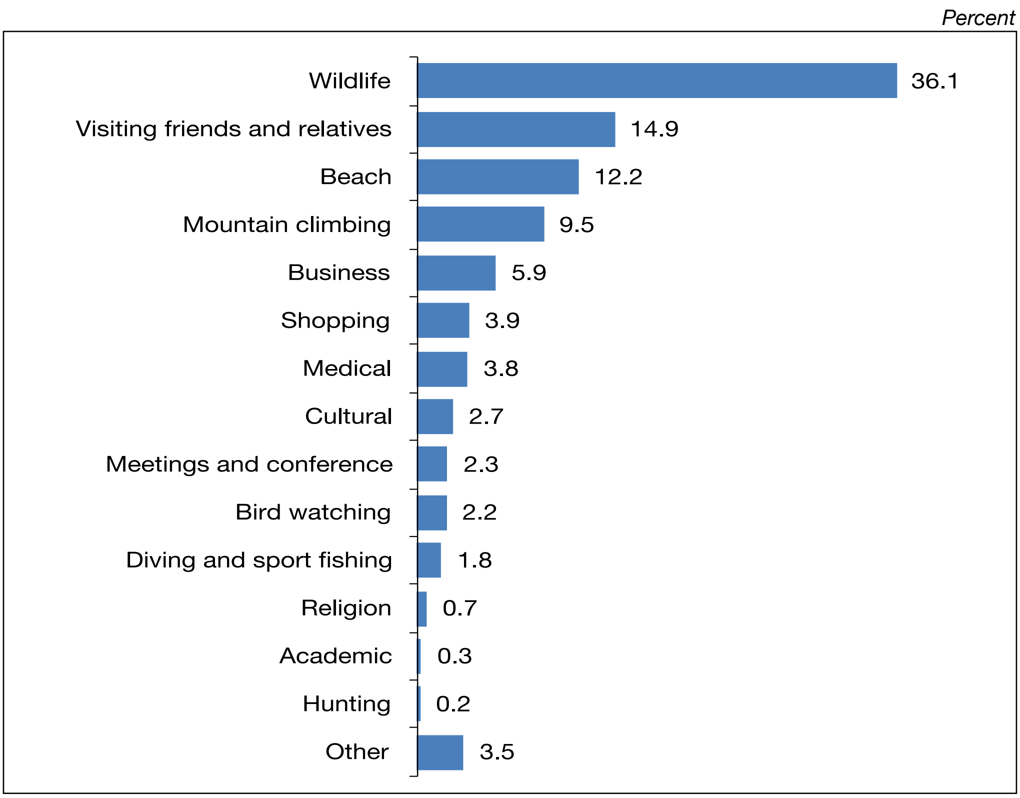
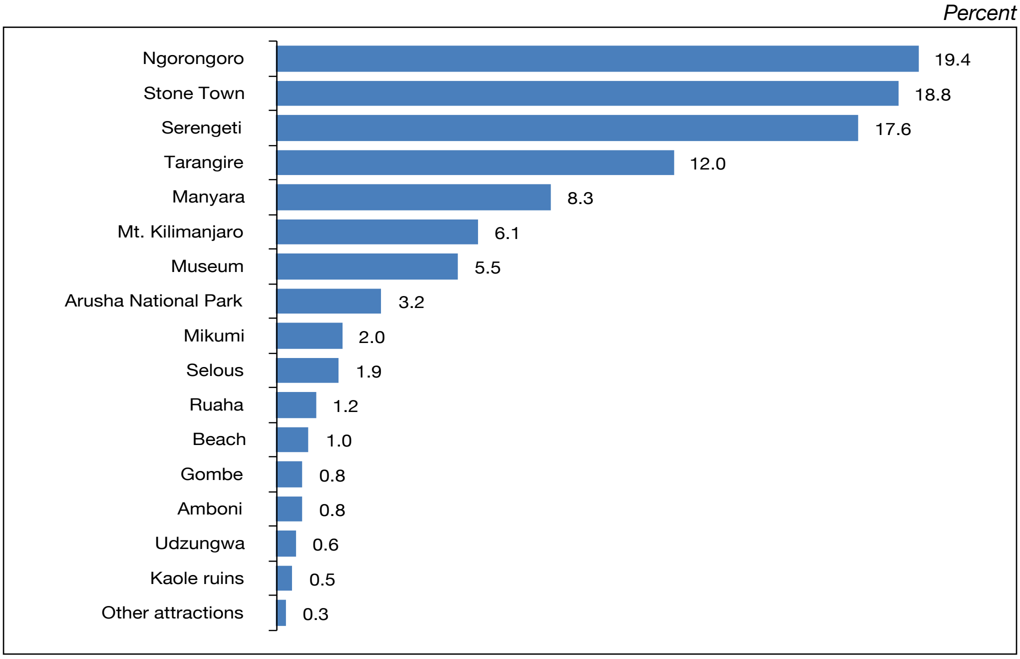
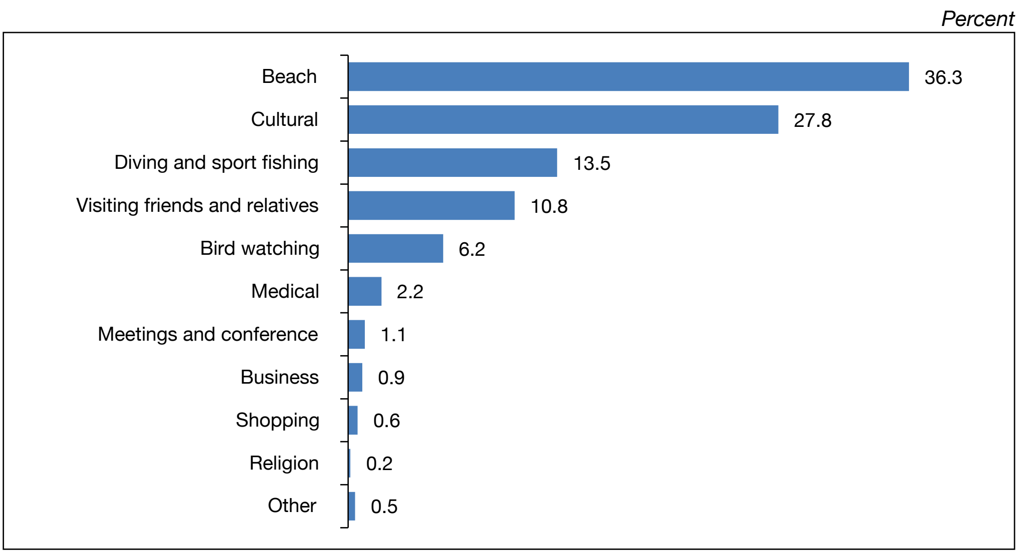


Chart 2.24: Most Visited Tourist Attractions



In Zanzibar, beach, which is the main tourism activity, attracted 36.3 percent followed by cultural tourism, diving and sport fishing; and visiting friends and relatives (**Chart 2.25**).

Chart 2.25: Main Tourism Activity in Zanzibar

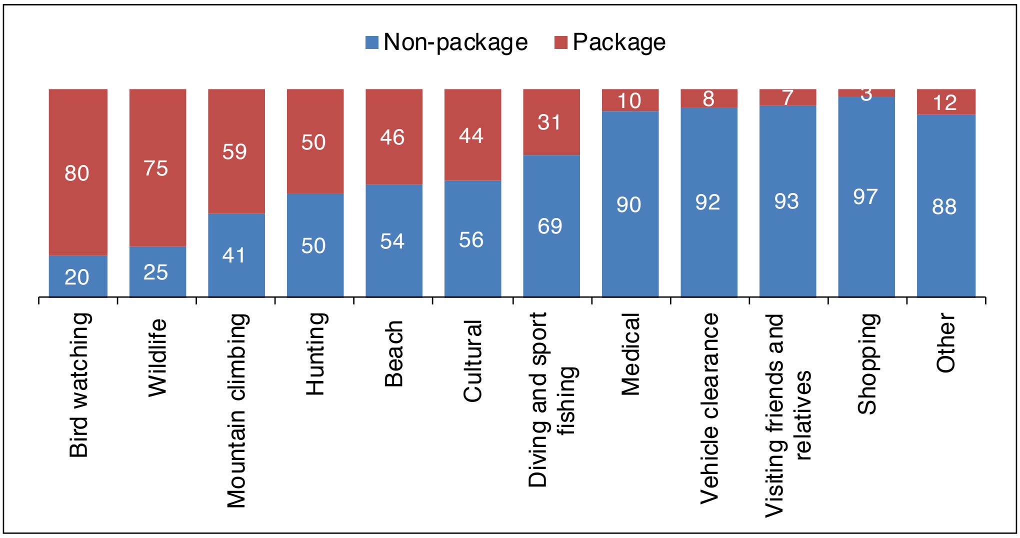


2.12 Tourism activity by travel arrangement

The findings further show that visitors who came for bird watching, wildlife and mountain climbing were under package tour arrangement while most visitors who came for shopping, business and visiting friends and relatives preferred non-package tour arrangement (**Chart 2.26**).

Chart 2.26: Tourism Activity by Travel Arrangement

Percent



2.13 Tourism activity by top 15 source markets

The findings show diverse preference on tourism activities by source markets. Tourists from Netherlands, Australia, Spain, France, United States, China and Germany dominated the wildlife activities. With the exception of South Africa, which was dominant in mountain climbing and beach tourism, visitors from the rest of African countries dominated in business and visiting friends and relatives (**Table 2.15**).

Table 2.15: Tourism Activities by Top 15 Source Markets

Percent

Country	Wildlife	Beach	Cultural	Mountain climbing	Business	Visiting friends and relatives	Diving and sport fishing	Medical	Shopping	Hunting	Other
Netherlands	77.2	5.5	5.8	4.7	0.0	3.8	0.0	0.7	0.0	0.0	2.5
Australia	74.3	8.0	3.0	7.8	0.0	2.1	0.9	1.8	0.0	0.0	2.1
Spain	74.3	15.1	1.3	6.1	0.0	0.5	0.6	1.0	0.0	0.0	1.2
France	71.0	12.9	3.0	6.6	0.7	2.1	1.4	0.7	0.2	0.1	1.2
USA	66.8	8.1	2.4	8.9	0.2	6.1	0.3	1.9	0.4	0.3	4.7
China	63.7	7.1	6.7	7.9	0.2	6.0	0.4	3.9	0.0	0.4	3.7
Germany	60.2	13.2	2.4	12.3	1.1	6.5	0.5	2.3	0.1	0.0	1.4
UK	51.7	12.9	4.4	8.7	0.3	14.0	2.1	2.8	0.1	0.2	2.7
Italy	40.8	29.1	2.6	18.6	0.0	3.0	0.6	0.9	0.0	0.0	4.4
Uganda	10.0	10.4	0.5	3.6	4.3	36.9	0.5	5.4	2.9	0.0	25.6
South Africa	8.2	29.5	3.8	35.3	0.4	3.1	0.7	1.3	1.3	0.0	16.6
Kenya	4.4	9.1	1.8	3.7	1.3	44.3	0.4	5.7	2.2	0.0	27.2
Zimbabwe	2.0	12.2	0.4	10.0	22.9	5.1	4.4	1.8	28.7	0.2	12.2
Burundi	2.0	2.4	1.7	1.1	1.7	51.2	2.8	14.8	5.6	0.2	16.5
Zambia	1.4	8.7	0.6	2.6	15.4	5.9	4.5	1.6	25.0	0.0	34.4

2.14 Tourism activity and purpose of visit

The survey results indicate that visitors who came for various purposes also perform tourism activities before they leave the country. The results reveal that, about 96 percent of business visitors perform diving or sport fishing, beach tourism, wildlife tourism and mountain climbing. The majority of holidaymakers perform wildlife tourism, beach tourism and mountain climbing. Furthermore, the majority of visitors who came for meeting and conferences performed beach tourism, wildlife tourism, mountain climbing and cultural tourism. Concurrently, about 86 percent of visitors who came to visit friends and relatives performed wildlife tourism, beach tourism and mountain climbing (**Table 2.16**).

Table 2.16: Tourism Activity and Purpose of Visit

Purpose of visit	Tourism activity							
	Beach	Bird watching	Cultural	Diving and sport fishing	Hunting	Mountain climbing	Wildlife	Total
Business	27.4	0.3	4.0	30.6	0.3	16.4	21.1	100
Leisure and holidays	16.1	3.5	3.0	0.7	0.1	13.3	63.3	100
Medical treatment	25.3	0.0	6.1	3.0	0.0	9.1	56.6	100
Meetings and conference	42.9	1.2	10.6	3.9	0.0	15.7	25.6	100
Religion	54.2	1.0	4.2	0.0	0.0	28.1	12.5	100
Scientific and academic	32.2	0.8	6.6	1.7	0.0	5.0	53.7	100
Visiting friends and relatives	32.4	2.7	8.1	2.1	1.3	15.7	37.7	100
Volunteering	19.1	0.4	6.1	0.4	0.0	9.4	64.6	100
Other	18.6	0.0	23.0	2.7	0.9	8.0	46.9	100

2.15 Average Expenditure

The overall average expenditure per person per night was USD 266 in 2019 compared with USD 193 in 2018. Leisure and holidays visitors spent the highest with the average of USD 358 per person per night (**Table 2.17**). With regard to travel arrangement, the average expenditure of visitors under package tour arrangement was USD 379 compared with USD 216 under non-package tour arrangement.

Table 2.17: Average Expenditure by Purpose and Travel Arrangement, URT

USD millions

Purpose of visit	Travel arrangement		Overall
	Package	Non-package	
Business	364	183	225
Leisure and holidays	404	322	358
Medical treatment	428	230	279
Visiting friends and relatives	361	185	226
Other	281	113	149
Overall	379	216	266

In terms of source markets, visitors from the United States had the highest average expenditure of USD 427.6 per person per night, followed by Netherlands with USD 318.8 (**Table 2.18**).

Table 2.18: Average Expenditure - Top 15 Source Markets by Travel Arrangement

USD

Country	Travel arrangement		Overall
	Package	Non-package	
United States	546.0	279.6	427.6
Kenya	394.0	94.7	272.2
United Kingdom	348.8	163.3	245.7
Italy	301.7	116.5	195.9
France	259.5	109.8	152.6
Netherlands	686.5	171.7	318.8
Germany	267.0	85.9	137.7
Spain	218.3	75.1	128.8
South Africa	258.5	170.3	209.5
China	268.6	83.0	186.1
Zambia	232.0	277.8	264.7
Burundi	225.0	53.0	146.0
Australia	420.0	111.2	172.9
Uganda	389.0	36.6	212.8
Zimbabwe	212.0	159.6	179.3

2.16 Tourism Earnings

Tourism earnings increased by 7.9 percent to USD 2,604.5 million in 2019 from USD 2,412.3 million recorded in 2018. This development is mainly a result of an increase in the average expenditure and the length of stay. Out of USD 2,604.5 million, USD 2,346.9 million was earned from tourists who came for leisure and holidays, which accounted for 90.1 percent of the total earnings (**Table 2.19**). About 70.5 percent of total earnings were received from visitors who came under the package tour arrangement.

Table 2.19: Tourism Earnings by Purpose of Visit and Travel Arrangement, URT

USD millions

Purpose of visit	Travel arrangement		Total earnings
	Package	Non-package	
Business	17.1	56.2	73.3
Leisure and holidays	1,781.8	565.1	2,346.9
Visiting friends and relatives	7.7	76.9	84.6
Other	28.5	71.2	99.6
Tourism earnings	1,835.1	769.4	2,604.5

In Zanzibar, tourism earnings increased by 5.5 percent to USD 535.2 million in 2019 compared with USD 507.5 million in 2018, largely associated with an increase in average expenditure per person per night and length of stay. Likewise, a large share of earnings was received from visitors who came for leisure and holidays, which is USD 531.8 million accounting for 99.4 percent of the total earnings. Earnings from tourists who came under the non-package tour arrangement accounted for 66.4 percent of the total earnings (**Table 2.20**).

Table 2.20: Tourism Earnings by Purpose of Visit and Travel Arrangement, Zanzibar

USD millions

Purpose of visit	Travel arrangement		Total earnings
	Package	Non-package	
Leisure and holidays	178	353	531.8
Business	0.3	0.9	1.2
Visiting friends and relatives	0.3	0.3	0.6
Other	0.2	1.4	1.6
Tourism earnings	179.6	355.6	535.2

2.17 Outlook

According to the UNWTO World Tourism Barometer, May 2020, tourism sector is going to be adversely impacted by the COVID-19 outbreak in 2020 and recovery is anticipated in 2021. It is evident that, the world is facing an extraordinary global health, social and economic emergency with the COVID-19 pandemic. Tourism is among the most affected sectors with – airplanes on the ground, hotels closed and travel restrictions put in place in virtually all countries around the world. Thus, the COVID-19 pandemic has cut international tourist arrivals in the first quarter of 2020 by 22 percent compared to the number recorded in the corresponding quarter in 2019. This slowdown translates into a loss of 67 million international arrivals and about USD 80 billion in receipts. Therefore, prospects for the year have been downgraded several times since the outbreak in view of the high level of uncertainty. Therefore, international tourist arrivals for 2020 are projected to decline between 58 and 78 percent, depending on the speed of the containment and the duration of travel restrictions and shutdown of borders. Nonetheless, the outlook remains highly uncertain.

Tanzania like many other countries has also experienced a significant decline in the number of arrivals, following containment measures taken by countries, which resulted into lockdowns and slowdown of economic activities including travel restrictions. Notwithstanding, the performance is on the increasing trend as the number of tourist arrivals has picked up from 7,130 in April 2020 to 87,605 in December 2020. Nevertheless, prospects for 2020 are still on the downside compared to 2019, though rebound is projected in the medium term.

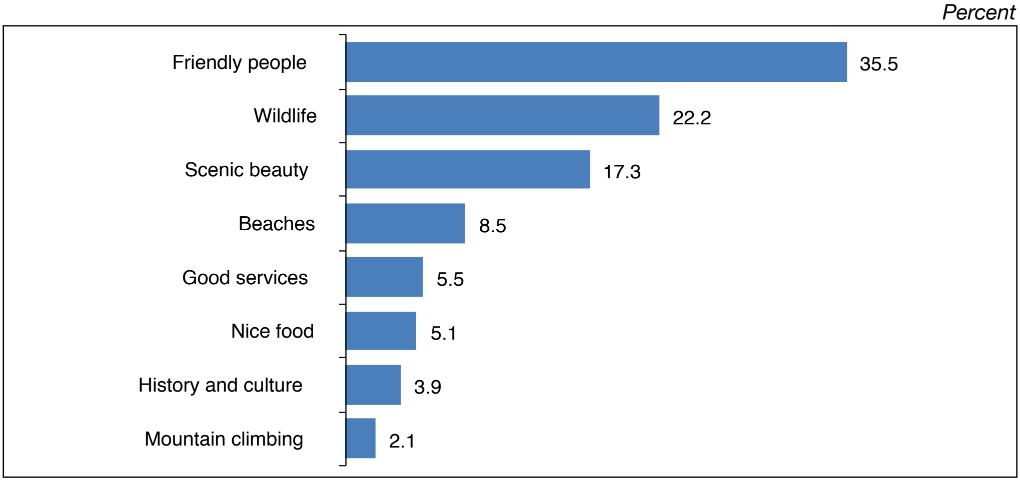
2.18 Visitors impression and areas of improvement

2.18. Visitor's impression

Visitors were largely impressed by the friendliness of the people, wildlife, scenic beauty and beaches. About 36 percent of the visitors were impressed by the hospitality and friendliness of the people, 22.2 percent by wildlife, 17.3 percent by scenic beauty and 8.5 percent by beaches (**Chart 2.27**).

Chart 2.27: Visitors Impression

Percent



2.19 Comparative analysis

The survey made a comparative analysis between Tanzania and selected countries in the region in terms of touring costs and the countries visited other than Tanzania by the same tourists during this particular trip and over the last five years. The results reveal that about 70 percent of the interviewees who visited Tanzania during the last five years, also visited South Africa, Kenya, Uganda, Botswana, Mozambique and Rwanda (**Chart 2.28a**). Further, about 82 percent of interviewees who visited Tanzania during the trip, also visited Kenya, South Africa, Uganda, Rwanda, Zambia, Botswana and Zimbabwe (**Chart 2.28b**). This implies that the ongoing regional integration initiatives should also look at a possibility of designing regional tourism products covering member countries with a view to maximize the existing tourism attraction potentials.

Chart 2.28a: Other African countries visited during the trip

Percent

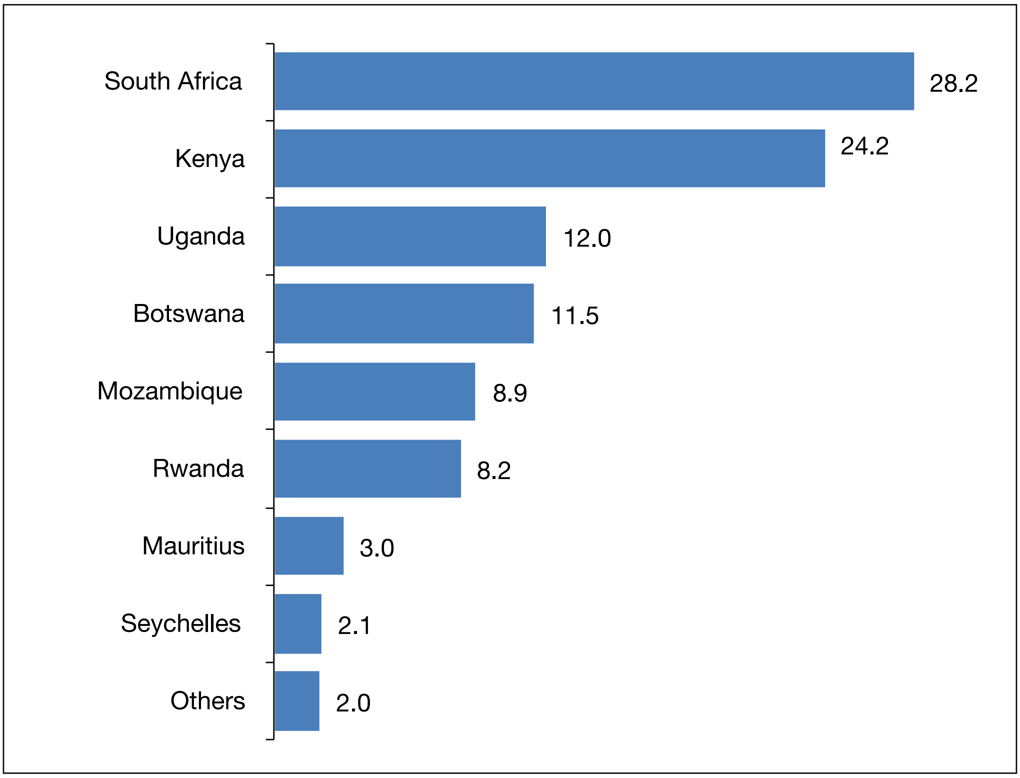
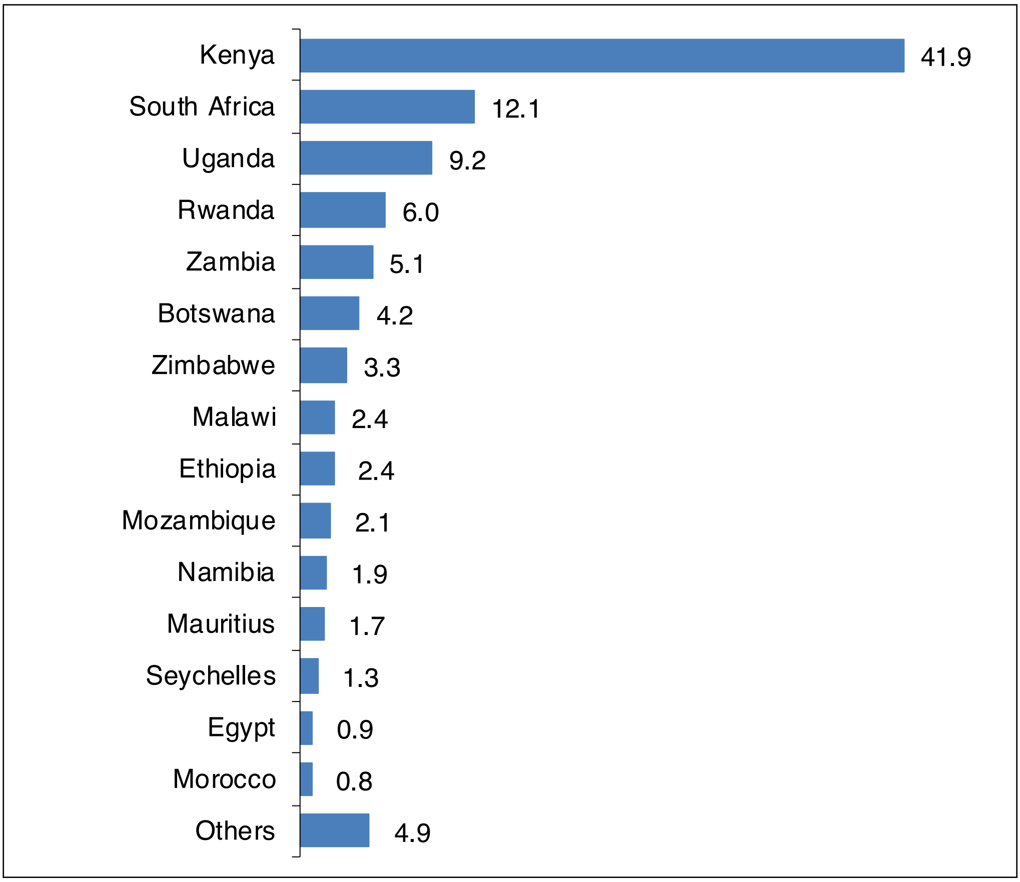


Chart 2.28b: Countries visited other than Tanzania during the last five years

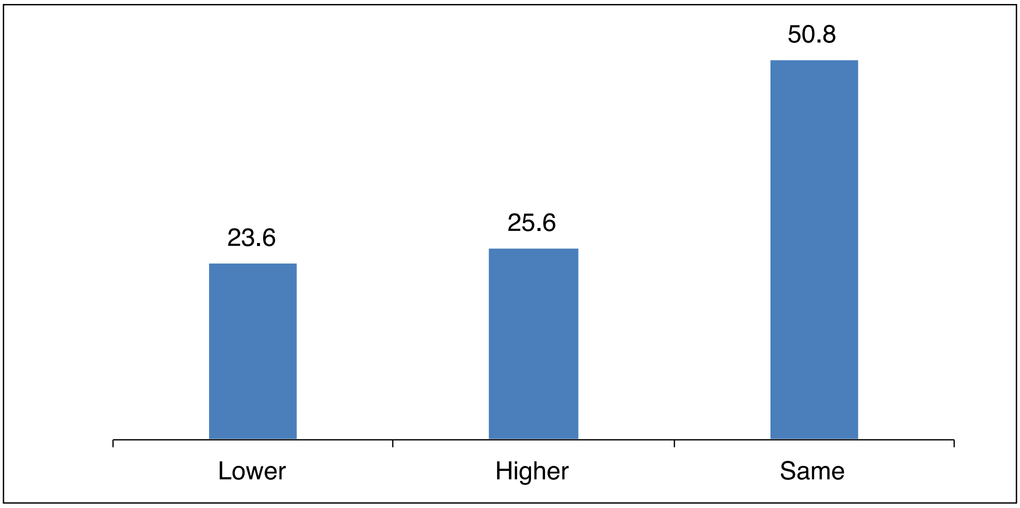
Percent



In terms of touring costs, the results reveal that about half of the interviewed visitors perceived that the costs of touring Tanzania were generally the same as in the other countries in the region. About 26 percent of the visitors said the costs are higher while 24 percent thought the costs were lower (**Chart 2.29**). This implies that cost could not be the major limiting factor for tourists visiting Tanzania and therefore efforts to improve efficiency and quality of service are likely to give the country comparative advantage over other countries in the region.

Chart 2.29: Cost of touring Tanzania

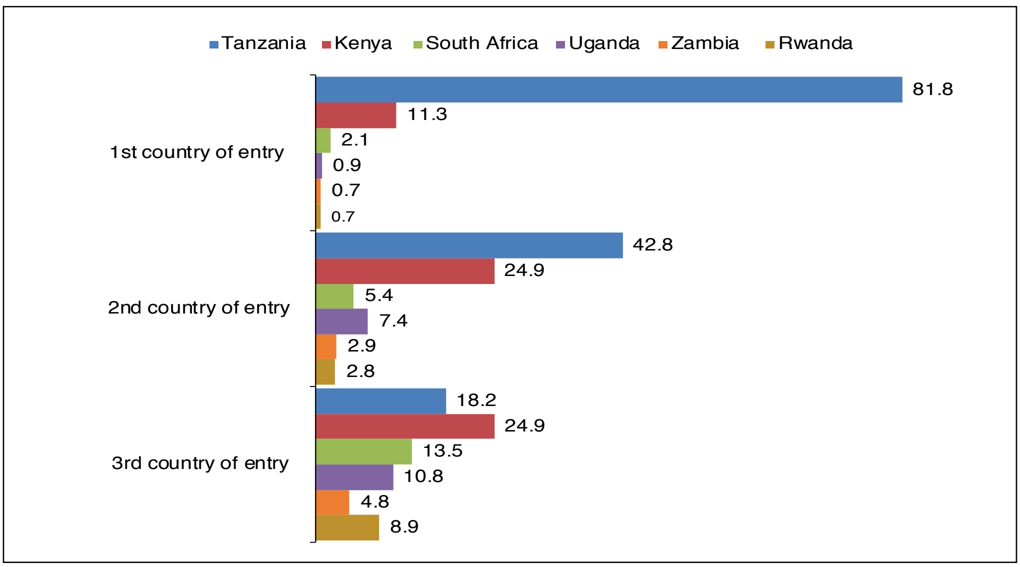
Percent



The results further reveal that about 82 percent of the interviewed visitors chose Tanzania as their first country of entry from their home countries followed by Kenya and South Africa. Also, Tanzania led as a second country of entry followed by Kenya and Uganda. This proves that the country has comparative advantage over the neighbouring countries in terms of unique tourism attractions.

Chart 2.30: Sequencing of Countries Visited

Percent

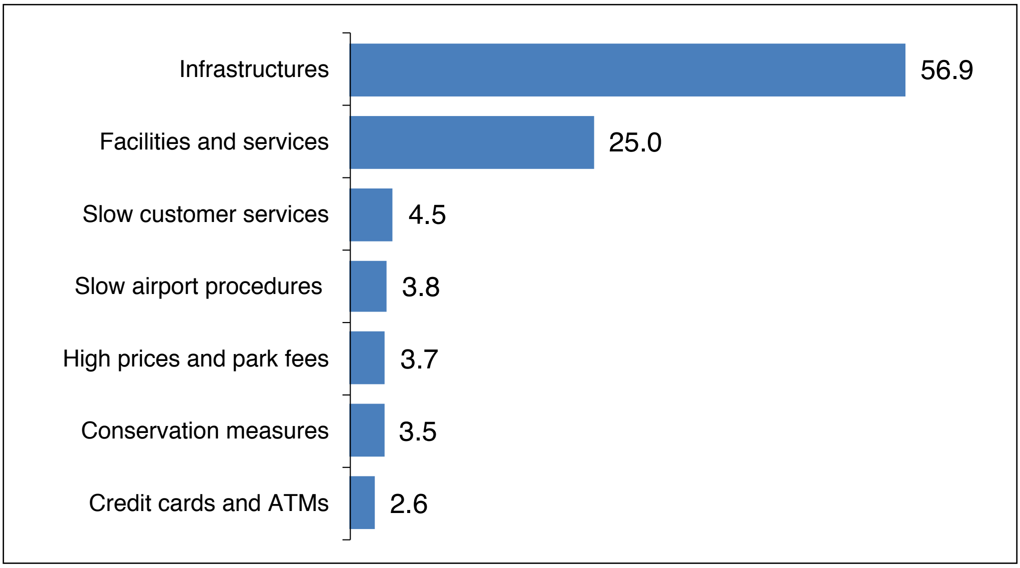


2.20 Areas for improvement

Visitors recommended some areas for improvement including infrastructures, facilities and customer services delivery (**Chart 2.31**). Other areas of improvement include conservation measures together with wider acceptability of credit cards and ATMs.

Chart 2.31: Areas for Improvement

Percent



Chapter 3: Conclusion and recommendations

3.1 Conclusion

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

The findings indicate that tourism earnings increased by 7.3 percent to USD 2,604.5 million in 2019 from USD 2,412.3 million recorded in 2018. The overall average expenditure per person per night was USD 266 in 2019, up from USD 193 registered in 2018. Visitors in the URT registered 13 nights average stay, compared to 10 nights average stay over the past seven years, while in Zanzibar the number of stay was 6 nights, similar to nights registered in past 6 years. Further, the survey established the major tourist activities in 2019 were beach, wildlife and cultural tourism, in that order.

The performance recorded so far is largely driven by the initiatives undertaken by both Governments (URT and Zanzibar) and the private sector, ranging from promotion of international tourism fairs, improvement in infrastructure, tourism facilities, tourist sites, facilitative conditions for investors and easing travel arrangements. Some of the recent initiatives aimed at attracting more visitors include launching of online visa in November 2018 for foreign nationals wishing to visit or live in Tanzania, establishment of Karibu Kusini Travel Fair in attempt to promote the Southern tourism circuit, inauguration of new Terminal III at Julius Nyerere International Airport and construction of Bikhole Tourist Centre in Unguja Zanzibar.

3.2 Recommendations

To further improve the performance of the tourism sector, more strategic involvement of key stakeholders in particular the Government cannot be overemphasized. Prioritizing improvement of major infrastructures, tourist facilities as well as diversifying tourism products. This will increase the number of tourists from different parts of the world and their length of stay at destination

Tanzania. **Matrix 1** presents key policy issues and recommendations to be considered for improving growth of the sector going forward.

Matrix 1: Summary of Major Policy Issues and Actions

S/n	Key issues	Description	Required Intervention	Specification	Responsible Ministry/ Authority
1.	Low increase in the number of tourists' arrivals.	The number of tourists increased by 1.4 percent in 2019.	Diversify tourism products.	Further develop and diversify tourism products including development of beaches in Mainland, water front project, cruise ship tourism, cultural and historical and Meeting Incentives Conference and Events (MICE). This could go hand in hand with the Government improving/ upgrading infrastructures heading to such investments.	MOFP, MNRT, LGAs in Zanzibar, TIC, ZCT, ZATI.
			Diversify tourism markets.	Establishment of e-marketing strategy and set aside more resources for tourism promotion in non-traditional markets, especially in Eastern Europe, Russia, Asia and other regions.	MNRT, LGAs, ZCT, TCT, TTB, and ZATI
2.	Low usage of credit cards.	Only 12.2 percent of visitors used credit cards as a mode of payment because of limited internet connectivity and high surcharge.	Improve internet connectivity and sensitize service providers to increase usage of credit cards and reduce/ regulate surcharge.	Develop a sensitization program including setting a mechanism to monitor progress.	MNRT, ZCT, TTB, ZATI and BOT.
3.	Slow visa processing in some airports.	The launching of e-immigration (i.e. online visa) aims to address this challenge.	Improve internet connectivity.	Allocate more resources to ensure reliable internet connectivity.	ISD, TAA and ZAA.
4.	Infrastructure challenge in some National Parks.	Road in some National Parks do not have regular maintenance.	Regular maintenance.	Regular maintenance of roads in some National Parks	TANAPA and NCAA.

Appendices

Appendix A: Survey Methodology

I. Introduction

This section describes the methodology used in the 2019 International Visitors exit Survey. Generally, similar methodology used for conducting International Visitors' Exit surveys in Tanzania since 2001 was adopted. The rest of the section comprise sample design and selection; survey instruments; scope and coverage; training; data collection and processing; and expenditure estimation procedures.

II. Scope of the Survey

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

III. Sample Size

The sample covered 10,780 interviewees. However, taking into account the accompanying friends and relatives sharing the costs with the interviews, the total number of visitors covered were 21,978. This sample was considered sufficient to meet the survey's objectives.

IV. Data Collection and coverage

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

V. Enumerators' Manual

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

VI. Training of Enumerators

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

VII. The Questionnaire

The questionnaire used was similar to the one used in the previous surveys with a few questions added to capture additional information for promotion strategy and policy review to improve service delivery. The questionnaire had 29 questions, comprising four main parts namely: visitor profiles, travel behavior, expenditure patterns and visitor's comments (**Appendix III**).

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

Questions 11 to 17 targeted at obtaining travel behavior, namely; type of tour arrangement (package/non package), items in the package and number of nights spent in Tanzania Mainland and Zanzibar.

Questions 18 to 21 were structured to estimate tourism expenditure. The questions probed for details on the amount spent as well as mode of payment used to transact.

Question 22 and 23 seek information on whether the visitor is likely to come back to Tanzania and the reason for doing that.

Question 24, 25 and 26 are intended to compare the cost of touring in Tanzania and in the neighbouring countries

Question 27 and 28 are about visitors impression and the areas that need improvement with a view to make Tanzania a better tourist destination.

Question 29 seeks information on the entity that arranged the trip for the visitors to Tanzania.

VIII. Data Processing

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

IX. Tourism Expenditure Estimation

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

The model is depicted in the following equation:

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

Whereby:

E_V = Total tourist expenditure in Tanzania

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

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

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

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

T = Average length of stay derived from the survey.

The Simplified Model

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

Procedure and assumptions used for the estimation of tourist expenditure for 2019:

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

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

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

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

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

Appendix B: Questionnaire

THE 2019 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 re warding experience. Before you leave, you are kindly requested to complete this questionnaire as accurately as you can. The information you give 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 RESEARCHER:*__________________________________

*DATE:*____________________ *SIGNATURE:* ___________________

NAME OF THE DATA ENTRANT: ______________________________

1. Nationality ______________ Country of Residence ___________________

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

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

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

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

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

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

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

6. Gender Number of females

Number of males

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

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

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

Wildlife tourism	[ ]	Mountain climbing	[ ]
Beach tourism	[ ]	Hunting tourism	[ ]
Cultural tourism	[ ]	Visiting friends and relatives	[ ]
Bird watching	[ ]	Vehicle clearance/pick up	[ ]
Diving and Sport Fishing	[ ]	Shopping	[ ]
		Others (please specify): ……………………	

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

Amboni Caves	[ ]	Selous	[ ]	Mt. Kilimanjaro	[ ]
Mikumi	[ ]	Manyara	[ ]	Museums	[ ]
Ruaha	[ ]	Stone town	[ ]	Udzungwa	[ ]
Ngorongoro	[ ]	Kaole ruins	[ ]	Serengeti	[ ]
Arusha Nat. Park	[ ]	Tarangire	[ ]	Gombe	[ ]

Others (please specify): ……………………

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

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

11. Did you travel in package tour or independently?

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

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

International transport	[ ]	Sightseeing/excursion/ game activities	[ ]
Accommodation	[ ]	Guided tour	[ ]
Food and Drinks	[ ]	Travel insurance	[ ]
Diving and sport fishing	[ ]	Other (please specify)	....

13. Total cost of the package tour:

Currency [ ]

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

15. The total number of nights in the package tour INCLUDING nights spent in other countries [ ]

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

Currency [ ]

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

Zanzibar Islands [ ]

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

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

Currency [ ]

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

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

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

Yes [ ] No [ ]

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

Cash [ ] Traveller's cheques [ ]

Credit card [ ] Other (please specify) ....

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

23. Will you come again?

Explain ____

____

____

____

____

____

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

Tanzania ………… times	Seychelles ………… times
Kenya …………… times	South Africa ……..... times
Uganda ………..… times	Botswana ………..… times
Rwanda ………..… times	Mozambique ……..... times
Mauritius ………… times	Other (specify) ……. times

25. In sequence, what countries of Africa (including Tanzania) did you visit in this trip?

(Note: Countries may appear more than once, in sequence)

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

26. Generally, how did you find the cost of touring Tanzania as compared to other African countries?

Higher [ ]

Lower [ ]

Same [ ]

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

……………………………………………………………………………………

……………………………………………………………………………………

……………………………………………………………………………………

……………………………………………………………………………………

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

……………………………………………………………………………………………

……………………………………………………………………………………………

……………………………………………………………………………………………

……………………………………………………………………………………………

29. Name the company (Travel agent/Tour operator) that was responsible for arranging your visit to Tanzania:

In your home country ……………………………………

In Tanzania ……………………………………………

In other countries …………………………………………

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

Appendix C1: Tourism Business Trends in Tanzania, 2014 – 2019

	2014	2015	2016	2017	2018	2019
International visitors	1,140,156	1,137,182	1,284,279	1,327,143	1,505,702	1,527,230
International visitors in hotels	1,054,338	1,033,555	1,145,934	1,163,752	1,404,672	1,353,279
Tourism earnings in USD million	2,006.3	1,901.9	2,131.6	2,259.0	2,412.3	2,604.5
Average length of stay	10	10	9	10	10	13
Average expenditure (USD)						
Package tour	277	305	290	410	331	379
Non-Package	117	141	131	139	135	216
Purpose of visit (%)						
Leisure and holidays	68.9	64.7	59.9	62.9	62.0	67.0
Visiting friends and relatives	11.6	15.1	18.3	15.8	16.1	15.5
Business	8.9	10.7	11.0	8.9	8.9	7.0
Meetings and conference	4.6	4.9	5.5	6.4	5.5	3.1
Volunteering	2.4	2.4	2.2	2.3	2.6	1.9
Scientific and academic	1.5	1.4	2.4	1.5	0.8	1.0
Other	2.1	0.8	0.7	2.2	4.1	4.5

Appendix C2: Percentile of Average Expenditure of International Visitors (USD)

K^th Percentile	Independent			Package			Combined		
	URT	Mainland	Zanzibar	URT	Mainland	Zanzibar	URT	Mainland	Zanzibar
25	47	62	45	192	160	198	60	78	56
50	100	117	93	340	274	340	145	145	139
75	172	178	169	502	421	531	292	251	299
Mean	*216*	*152*	*148*	*379*	*384*	*327*	*266*	*223*	*206*

Appendix C3: International visitors arrival by country of residence

Countries	Residency	Percentage
United States of America	3,150	14.33
Kenya	1,837	8.36
United Kingdom	1,769	8.05
Italy	1,435	6.53
France	1,353	6.16
Netherlands	1,200	5.46
Germany	1,181	5.37
Spain	1,019	4.64
South Africa	845	3.84
China	535	2.43
Zambia	508	2.31
Burundi	461	2.10
Zimbabwe	450	2.05
Uganda	442	2.01
Australia	436	1.98
Switzerland	422	1.92
Canada	407	1.85
United Arab Emirates	350	1.59
India	311	1.42
Denmark	286	1.30
DRC	282	1.28
Belgium	254	1.16
Sweden	214	0.97
Korea North	189	0.86
Norway	171	0.78
Israel	131	0.60

Countries	Residency	Percentage
Austria	123	0.56
Ireland	107	0.49
Japan	105	0.48
Poland	103	0.47
Rwanda	100	0.46
Taiwan	89	0.40
New Zealand	88	0.40
Portugal	87	0.40
Comoros	87	0.40
Oman	85	0.39
Botswana	79	0.36
Singapore	78	0.35
Egypt	62	0.28
Russian	61	0.28
Malawi	56	0.25
Mexico	46	0.21
Croatia	46	0.21
Malaysia	45	0.20
Turkey	38	0.17
Saudi Arabia	38	0.17
Thailand	35	0.16
Qatar	34	0.15
Czech Republic	34	0.15
Brazil	30	0.14
Bulgaria	30	0.14
Morocco	29	0.13

Countries	Residency	Percentage
Romania	27	0.12
Slovakia	27	0.12
Greece	27	0.12
Finland	27	0.12
Hungary	26	0.12
Korea, South	25	0.11
Ethiopia	25	0.11
Pakistan	25	0.11
Luxembourg	23	0.10
Slovenia	23	0.10
Philippines	22	0.10
Argentina	20	0.09
Mozambique	17	0.08
Colombia	17	0.08
Namibia	16	0.07
Lesotho	15	0.07
Sudan	14	0.06
Trinidad and Tobago	14	0.06
South Sudan	13	0.06
Peru	12	0.05
Kuwait	12	0.05
Algeria	11	0.05
Nigeria	10	0.05
Serbia	10	0.05
Iceland	10	0.05
Seychelles	10	0.05
Uruguay	7	0.03

Countries	Residency	Percentage
Estonia	7	0.03
Swaziland	7	0.03
Ghana	7	0.03
Indonesia	7	0.03
Ecuador	6	0.03
Chile	6	0.03
Liechtenstein	6	0.03
Angola	6	0.03
Sri Lanka	5	0.02
Lebanon	5	0.02
Libya	5	0.02
Mauritius	5	0.02
Gabon	5	0.02
Guatemala	4	0.02
Bahrain	4	0.02
Nepal	4	0.02
Syrian	4	0.02
Vietnam	3	0.01
Ukraine	3	0.01
Costa Rica	3	0.01
Cameroon	3	0.01
Bangladesh	3	0.01
Latvia	2	0.01
Cambodia	2	0.01
Afghanistan	2	0.01
Burkina Faso	2	0.01
Jordan	2	0.01

Countries	Residency	Percentage
Macedonia	2	0.01
Niger	2	0.01
Cote D'Ivoire	2	0.01
Mauritania	2	0.01
Madagascar	2	0.01
Eritrea	1	0.00
Somalia	1	0.00
Iraq	1	0.00
Tajikistan	1	0.00
Tunisia	1	0.00
Panama	1	0.00
Liberia	1	0.00
Cuba	1	0.00
Iran	1	0.00
Senegal	1	0.00
Belarus	1	0.00
	21,977	100.00

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