# The 2016 International Visitors' Exit Survey Report

# TANZANIA TOURISM SECTOR SURVEY

## THE 2016 INTERNATIONAL VISITORS' EXIT SURVEY REPORT

October 2017

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## ACRONYMS

| | |
|---|---|
| AAKIA | Abeid Amani Karume International Airport |
| BOT | Bank of Tanzania |
| HAT | Hotel Association of Tanzania |
| HOR | Horohoro |
| JNIA | Julius Nyerere International Airport |
| KAS | Kasumulo |
| KIA | Kilimanjaro International Airport |
| LGAs | Local Government Authorities |
| MANY | Manyovu |
| 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 |
| 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 |

## FOREWORD

The global tourist arrivals grew by 3.9 percent in 2016 slightly lower than 4.4 percent recorded in 2015. Slower growth was more pronounced in Western Europe particularly France, German and Belgium largely associated with terrorist attacks. Slow growth was also registered in Americas particularly in Caribbean and Latin America owing to the outbreak of Zika virus epidemic. The regions that registered the highest growth were Asia and the Pacific with a growth of 8.4 percent followed by Africa with a growth of 8.2 percent.

In the case of Tanzania, we are glad to introduce the results of the 2016 Tanzania Tourism Sector Survey (TTSS), Report which is a collaborative initiative between the Ministry of Natural Resources and Tourism (MNRT), Bank of Tanzania (BOT), National Bureau of Statistics (NBS), Immigration Department and the Zanzibar Commission for Tourism (ZCT).

The results show that the number of international tourist arrivals increased by 12.9 percent to 1,284,279 from 1,137,182 visitors recorded in 2015. Consequently, the county's tourism earning by 12.1 percent to USD 2,131.6 million in 2016 increased from USD 1,902.0 million recorded in 2015. In the case of Zanzibar, arrivals increased by 40.7 percent to 284,519 resulting to a surge in tourist earnings to USD 383.0 million in 2016 compared with USD 293.5 million in 2015. Similar to the previous years, leisure and holidays continued to be the main purpose of visit to Tanzania and the major tourism activities were wildlife and beach. However, wildlife activities were more pronounced in the Mainland while beach activities were more pronounced in Zanzibar. The report provides insightful information to various stakeholders for a diverse of uses including policy making and marketing strategies.

**Hon. Prof. Jumanne Maghembe (MP)**
**Minister**
**Ministry of Natural Resources and Tourism**

**Prof. Benno Ndulu**
**Governor**
**Bank of Tanzania**

## ACKNOWLEDGEMENT

This work has received valuable contributions from various individuals and institutions. The Steering Committee of the Tanzania Tourism Sector Survey (TTSS) Project would like to express sincere appreciation for the cherished support that has led to the successful completion of the 2016 International Visitors' Exit Survey. Sincere appreciation goes to the Chief Executive Officers of the participating institutions namely; the Ministry of Natural Resources and Tourism, Bank of Tanzania, National Bureau of Statistics, Immigration Services Department, Zanzibar Commission for Tourism and the Tourism Confederation of Tanzania, for their diligent guidance and support.

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

The overall supervision of this work was under the conscientious leadership of Mr. Z. A. Kimwaga (Director of Tourism – MNRT) and J. J. Nyella (Director, Economic Research and Policy-BOT). Mr. P. Mwiru, Assistant Director of Tourism (MNRT) and Mr. F. Mlele, Manager, International Economics and Trade Department (BOT), led the Technical Team. Other members of the team were Dr. C. Masenya (BOT), Mrs. V. W. Kejo (BOT), Mr. P. Mboya (BOT), Mr. J. Msimbano (MNRT), Mr. V. Tesha (NBS), Ms. E. Lema (NBS), Mrs. J. Rugemalila (NBS), Mr. C. Mndeme (Immigration Department) and Mr. M. Jaffer (ZCT). We also treasure the hard work of the IT team, which, was composed of Mr. R. Barongo and R. William from BOT.

## EXECUTIVE SUMMARY

### Background

The International visitors' exit survey is an annual activity, which started in 2001. The main objectives of the survey is to update information on tourist earnings for improving compilation of Balance of Payments and National Accounts. The survey is also intended to gather information for tourism promotion and macroeconomic policy formulation. The survey targets visitors exiting the country via air and land border points.

This report presents the findings of the 14th round of the surveys, based on face-to-face interviews conducted at eight departure points for a period of two weeks during August/September 2016.

### Global developments in the tourism industry

The UNWTO World Tourism Barometer, January 2017 showed that the international tourist arrivals grew by 3.9 percent to 1,235 million during 2016. The growth was slightly lower than 4.6 percent recorded in 2015 largely associated with a series of events including terrorist attacks in Western Europe particularly France, German, and Belgium; Zika virus epidemic in the Americas particularly in the Caribbean and Latin America; and unfavorable currency fluctuations. Arrivals to the Middle East declined in 2016 mainly on account of security concerns. The regions that registered the highest growth were Asia and the Pacific with a growth of 8.4 percent followed by Africa with a growth of 8.2 percent.

Europe continued to account for the largest share of international tourist arrivals, followed by Asia and the Pacific, the Americas, the Middle East and Africa. However, UNWTO projects that global international tourist arrivals will grow by between 3.0 and 4.0 percent in 2017. Asia and the Pacific; and African regions are expected to register a growth of between 5.0 and 6.0 percent.

### Recent tourism developments in the United Republic of Tanzania

Domestically, the recent developments to boost the tourist sector include:

a) The Annual Diaspora Homecoming Conference held in Zanzibar during 24 - 25 August 2016. The conference which attracted about 450 participants aimed at encouraging Tanzanian diaspora to engage in tourism business;

b) Strengthening of Air Tanzania by acquiring two Bombardier Q400 planes to expand both domestic and regional markets. Further, the Turkish Airlines launched three times weekly flights between Istanbul and Zanzibar. This is also expected to increase the number of visitors to the country;

c) Signing of Memorandum of Understanding (MoU) between Tanzania Tourist Board (TTB) and Air Tanzania (ATCL) to promote and market destination Tanzania to passengers aboard; and

d) Introduction of aggressive global e-marketing campaign for destination Tanzania by developing an official Tanzania Tourism App, which gives an overview of what Tanzania can offer as unique tourist destination, things to do, accommodation, and how to plan your trip.

## Main findings of the survey

### *Major source markets remained more or less the same*

The findings revealed that 16,639 tourists from 122 source markets to Tanzania were covered during the 2016 survey. Most visitors came from the United Kingdom, Kenya and the United States of America. There was a notable increase in the number of visitors from Kenya as its share increased to 11.7 percent from 9.7 percent recorded in 2015. This makes Kenya the second largest source market for Tanzania in 2016. Uganda and Burundi were the new entrants in the list of the top 15 source markets for Tanzania largely associated with proximity as well as increasing business interactions. Looking at Tanzania Mainland and Zanzibar separately, the list of the top 15 source markets remained more or less the same.

### *Tourism earnings increased*

Tanzania's tourism earnings increased by 12.1 percent to USD 2,131.6 million in 2016, from USD 1,902.0 million recorded in 2015. The surge was mainly driven by the number of arrivals, which increased, to 1,284,279, being 12.9 percent higher than the number recorded in 2015. Out of the total USD 2,131.6 million, USD 1,790.8 million was earned from tourists who came for leisure and holidays. Similarly, Zanzibar earnings increased by 30.4 percent to USD 383.0 million in 2016 compared with USD 293.5 million earned in 2015 owing to increase in the number of arrivals. Most of the Zanzibar earnings (USD 378.2 million) were received from visitors who came for leisure and holidays.

The overall average expenditure per person per night during 2016 was USD 178 compared to USD 199 recorded in 2015. The decrease in the average expenditure per person per night is partly explained by the increase in the number of arrivals from neighboring countries whose expenditures are lower. The average expenditure per person per night the under package tour arrangement was USD 290 per person per night while under the non-package tour it was USD 131. Business visitors under the package tour arrangement spent the most with an average of USD 386. Visitors who came to visit friends and relatives spent the least (USD 199). Visitors from China had highest average expenditure of USD 541 per person per night. Visitors from Burundi and Zambia had minimal average expenditures of less than USD 100 per person per night.

### *Leisure and holidays continued to be the major purpose of visit*

About 59.9 percent of tourists who visited the United Republic of Tanzania came for leisure and holidays, 18.3 percent for visiting friends and relatives and 11.0 percent for business purpose. Majority of holidaymakers for both Tanzania Mainland and Zanzibar came from the United Kingdom, Germany, the United States of America and Italy. The share of visitors who came for meetings and conference was the lowest, about 6 percent. The number of tourists coming for business purposes increased and were mainly from the neighboring countries, thanks to the improvements in environment for cross border trade and investment.

### *Majority of the visitors stayed between 8 and 14 nights*

The overall average length of stay of visitors in the Tanzania was 9 nights slightly lower than 10 nights recorded during the past five years. About 31 percent of the visitors spend between 8 to 14 nights, followed by those who stayed between 4 to 7 nights accounting for 27 percent. Visitors who stayed the longest were mainly from Germany, Spain, Canada, Italy and the United Kingdom. Visitors from the neighboring countries such as Kenya, Uganda, Zambia and South Africa stayed the shortest.

### *First-time visitors continue to dominate over repeat visitors*

The findings show that the share of first time visitors was 54.7 percent slightly higher than 52.6 percent recorded in 2015. Majority of these visitors had higher preference for package tour when compared to repeat visitors. Large share of repeat visitors was from the neighboring countries owing to the growing business relations and family ties.

## Wildlife continues to be the main tourism activity

Wildlife and beach were the most preferred tourism activities. Wildlife activity was more pronounced in Tanzania Mainland while beach tourism was more pronounced in Zanzibar. Moreover, conference tourism is upcoming activity, which accounted for about 11 percent compared to about four percent in 2015.

## *Majority of the interviewed visitors settled their bills in cash*

During the 2016 survey, cash continued to be a major mode of payment as about 84 percent of the interviewees settled their bills in cash. The findings reveal increasing usage of cash payment largely due to unacceptability of credit cards at most consumption points. These findings underscore the need to enhance efforts to sensitize on the importance of credit cards facilities.

## Recommendations

a) The overall average length of stay of a tourist who visited Tanzania was 9 nights slightly lower than 10 nights recorded during the past five years. In view of this, there is a need of enhancing diversification and promotion of new tourism products rather than relying on wildlife tourism in order to prolong the length of stay at a destination and increase tourism earnings. It is worth noting that, the government has embarked on the process of identifying beach plots in Tanzania Mainland, suitable for beach tourism in Tanga, Coast, Dar es Salaam, Lindi and Mtwara regions. This initiative should go in tandem with incentives to attract more investments in activities such as water sports in beach areas so as invite more tourists.

b) The survey results indicate that about 84 percent of the interviewed visitors settled their bills in cash, an increase of 2.7 percentage points from the previous survey. This indicates that unacceptability of credit cards continues to be a problem to the majority of visitors. This implies that there is need of enhancing efforts to sensitize owners of tourism establishments on the importance of credit card facilities.

c) Majority of visitors expressed concerns on the state of roads and other facilities, particularly entry procedures that resulted into congestion at entrance to the national parks. The government is therefore urged to continue with its efforts to improve roads particularly those leading to Tarangire National Park and other facilities.

d) Visitors raised concerns on cleanliness in the cities, towns and airports, inadequate washrooms and air condition at airports and public areas. Therefore, there is a need to enforce municipal laws on cleanliness and public awareness about the usage of garbage collection facilities such as dustbins placed in public areas.

e) The findings indicate that visitors also raised concerns on lack of transparency in pricing, information on the tourist attraction and conservation measures. There is a need of enhancing availability and accessibility of information materials to tourists at both source markets and entry points.

f) The findings indicate that visitors who are 65 years and above continued to be few. It should be noted that this age group is a potential market given that they have more disposable income and ample time for leisure. However, the group faced physical challenges, which call for a great concern and attention for their safety. This implies that there is a need for the government to design specific package and facilities, which will meet the specific needs of this group.

# Chapter 1: Recent developments in the tourism industry

## 1.1 Global prespective

International tourist arrivals grew by 3.9 percent to 1,235 million in 2016, according to the UNWTO World Tourism Barometer, January 2017, the seventh consecutive year of sustained growth (**Chart 1.1**). However, the growth was lower than 4.6 percent recorded in 2015 as some destinations recorded lower growth in 2016 due to a series of events including terrorism, Zika virus epidemic and unfavorable currency fluctuations.

**Chart 1.1: International tourist arrivals to the world, 2003-2016**

*In Millions*


**Source**: UNWTO World Tourism Barometer, January 2017

Region wise, Asia and the Pacific topped by registering a growth of international tourist arrivals of 8.4 percent in 2016, followed by Africa (**Table 1.1**). The Americas and Europe recorded lower growth in 2016 compared to 2015. The decline in Europe was attributed to terrorist attacks in some countries in Western Europe particularly France, German, and Belgium. Lower growth in the Americas particularly in Caribbean and Latin America was contributed by Zika virus epidemic. The growth of arrivals to the Middle East declined by 4.1 percent in 2016 largely on account of security concerns.

**Table 1.1: International Tourist arrivals by regions, 2010-2016**

| Region | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 |
|---|---|---|---|---|---|---|---|
| | | | **In Millions** | | | | |
| Europe | 489 | 521 | 541 | 567 | 580 | 608 | 620 |
| Asia and the Pacific | 206 | 218 | 234 | 250 | 264 | 279 | 303 |
| Americas | 150 | 156 | 163 | 168 | 182 | 193 | 201 |
| Africa | 50 | 50 | 52 | 55 | 55 | 54 | 58 |
| Middle East | 55 | 50 | 51 | 49 | 55 | 56 | 54 |
| | | | **Percentage Change** | | | | |
| Europe | 6.2 | 6.4 | 3.9 | 4.7 | 2.4 | 4.7 | 2.0 |
| Asia and the Pacific | 13.5 | 6.2 | 7.1 | 6.9 | 5.8 | 5.6 | 8.4 |
| Americas | 6.7 | 3.7 | 4.5 | 3.1 | 8.5 | 5.9 | 4.3 |
| Africa | 7.9 | -0.6 | 4.6 | 4.4 | 0.9 | -2.5 | 8.2 |
| Middle East | 6.5 | -10.6 | 2.2 | -3.0 | 12.8 | 0.9 | -4.1 |

**Source**: UNWTO World Tourism Barometer, Various Issues

Europe continued to account for the largest share of tourist arrivals, followed by Asia and the Pacific, the Americas, Africa and the Middle East (**Table 1.2**). The same pattern was observed in the previous years. However, the share of Africa increased by 0.2 percentage points to 4.7 percent in 2016, after declining for two consecutive years.

**Table 1.2: Market shares of international tourist arrivals**

*Percent*

| Region | 2012 | 2013 | 2014 | 2015 | 2016 |
|---|---|---|---|---|---|
| Europe | 52 | 52.1 | 51.0 | 51.1 | 50.2 |
| Asia and the Pacific | 22.5 | 23 | 23.3 | 23.5 | 24.5 |
| Americas | 15.6 | 15.4 | 16.0 | 16.2 | 16.3 |
| Africa | 5.0 | 5.0 | 4.9 | 4.5 | 4.7 |
| Middle East | 4.9 | 4.5 | 4.9 | 4.7 | 4.3 |
| **World** | **100** | **100** | **100** | **100** | **100** |

**Source**: UNWTO World Tourism Barometer, Various Issues

UNWTO projections indicate that international tourist arrivals worldwide will grow by between 3.0 and 4.0 percent in 2017 (**Table 1.3**). Region-wise, the growth is expected to be between 5.0 and 6.0 percent for both Asia and the Pacific and Africa. The growth in Americas is expected to be between 4.0 and 5.0 percent. Europe is expected to grow at 2.0 to 3.0 percent. The projections for the Middle East are positive, though with a larger degree of uncertainty and volatility.

**Table 1.3: International tourist arrivals: actual growth and projection**

*Percent*

| | Actual Growth | | | Projection |
|---|---|---|---|---|
| | 2015 | 2016 | Average 2005-2016 | 2017 |
| **World** | **4.6** | **3.9** | **3.9** | **3.0 to 4.0** |
| Europe | 4.7 | 2.0 | 3.0 | 2.0 to 3.0 |
| Asia and the Pacific | 5.6 | 8.4 | 6.1 | 5.0 to 6.0 |
| Americas | 6.0 | 4.3 | 3.8 | 4.0 to 5.0 |
| Africa | -2.5 | 8.2 | 4.5 | 5.0 to 6.0 |
| Middle East | 0.8 | -4.1 | 5.2 | 2.0 to 5.0 |

**Source**: UNWTO World Tourism Barometer, Various Issues

## 1.2 Tourism developments in the United Republic of Tanzania

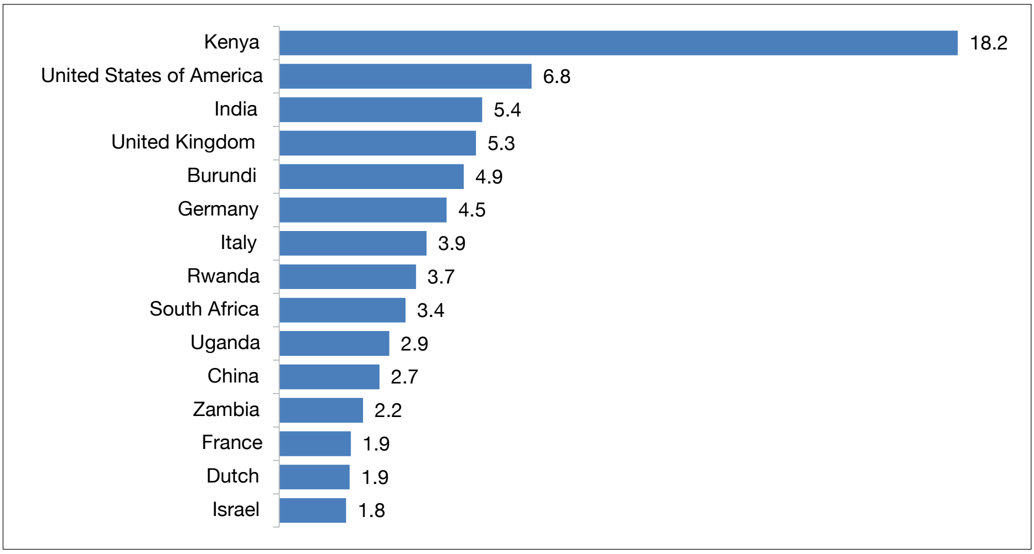
Tanzania's tourism industry is thriving and continues to be among the key activities in generating foreign exchange. The tourism industry continued to grow in 2016, with the number of tourist arrivals increasing by 12.9 percent to 1,284,279 from 1,137,182 recorded in 2015. Consequently, the county's tourism earnings rose by 12.1 percent to USD 2,131.6 million in 2016 from USD 1,902.0 million recorded in 2015. In the case of Zanzibar, arrivals increased by 40.7 percent to 284,519 resulting to a surge in tourist earnings to USD 383.0 million in 2016 compared with USD 293.5 million in 2015.

### 1.2.1 International tourist arrivals

The 2016 data from Immigration Services Department shows that, Kenya continued to be main source market for tourists arriving in Tanzania as it accounted for 18.2 percent of all international tourist arrivals (**Chart 1.2**). This is an increase of 18.3 percent to 233,730 compared with 197,562 visitors recorded in 2015, largely on account of increasing socio-economic interactions. The United State of America was the second largest source market with 6.8 percent followed by India, which replaced the position of the United Kingdom. The shift in the position of India is largely contributed by Dawoodi Bohra's Milad-un-Nabi celebrations that took place in Dar es Salaam in October 2016.

**Chart 1.2 International tourist arrivals to Tanzania, top 15 source markets, 2016**

*Percent*




**Source:** Immigration Services Department, 2016

### 1.2.2 Meetings and conferences

The third annual Diaspora Homecoming conference was held in Zanzibar Beach Resort from 24th to 25th August 2016. The conference attracted about 450 participants including Tanzanians living abroad and returnees and stakeholders from public and private sector. The theme of the conference was 'Bridging Tanzania Tourism and Investment: A New Outlook'. The aim of the conference was to engage and encourage Tanzanian diaspora to participate in tourism business as a means to promote investments in the country.

*His Excellency Dr. Ali Mohammed Shein during the official opening ceremony of the third Diaspora conference at Zanzibar Beach Resort*

### 1.2.3 Domestic and international flights

The Government of Tanzania purchased two Bombardier Q400 planes, which were launched in October 2016 to strengthen the Air Tanzania Company Limited (ATCL). The arrival of these planes allows Air Tanzania to expand both its domestic and regional markets. The planes are currently flying to a number of destinations including Dodoma, Mwanza, Mbeya, Kigoma, Bukoba, Kilimanjaro, Mtwara, Zanzibar and Comoros. The government has also completed the process of procuring additional four aircrafts by making advance payment of USD 56.89 million to Bombardier (Canada) and Boeing (USA). Out of the four aircrafts, one is expected to be delivered in 2017 and three in 2018, one being Boeing 787 Dream liner with the capacity of carrying 262 passengers. The arrival of these aircrafts will enable ATCL to fly to many destinations and hence increasing the number of international tourists visiting Tanzania.

*Arrival and official launching of new ATCL planes*

Further, Turkish Airlines launched three times weekly flights between Istanbul and Zanzibar on 12 December 2016. The opening of new route to Zanzibar is the reflection of the increased number of visitors to the destination.


*Hon. Ali Abeid Amaan Karume, Minister responsible for transport lauching the new route of Turkish Airline*

### 1.2.4 Promotion and marketing

Tanzania Tourist Board and Air Tanzania Company Ltd signed a two-year Memorandum of Understanding (MoU) on 30th November 2016 whereby the two institutions forged partnership in promoting travel and tourism. The two institutions also launched the ATCL in-flight magazine. It was agreed in the MoU that, TTB will carry out special training for ATCL staff on how to promote and market destination Tanzania to passengers aboard. ATCL will include destination Tanzania documentary in the in-flight TV entertainment list and magazine.

*Mr. Ladislaus Matindi (left) Director General ATCL and Ms Devota Mdachi-Managing Director TTB signing the MoU.*

### 1.2.5 Tanzania Tourist Board introduces Official Tanzania Tourism's app

Tanzania Tourist Board has embarked on an aggressive global e-marketing campaign for destination Tanzania by developing an Official Tanzania Tourism app. The app was developed concurrently with the establishment of the destination online tourism portal, which contains detailed information on various tourist destinations in Tanzania. The app gives an overview of what Tanzania can offer as unique tourist destination in Africa, things to do, accommodation, and how to plan a trip. It will later have provision for the potential visitors to book and make payment online. The Official Tanzania Tourism app has come at a time when there are many efforts made by private sector tourism apps. The app, which is available at Google Play Store, is accessible to android mobile phones users. This will complement the existing number of marketing and promotional tools and techniques used by the TTB in promoting destination Tanzania globally. The introduction of e-marketing campaign is expected to boost the tourism industry in the country.

### 1.2.6 The construction of terminal III at Julius Nyerere International Airport

Julius Nyerere International Airport is currently operating beyond its capacity by handling 2.5 million passengers annually against its capacity of 1.5 million passengers. In this respect, the construction of Terminal III, which started in April 2014, will accommodate six million passengers annually. The airport will have the potential of becoming business and transport hub of the region and will help to promote Tanzania tourism industry.

*The look of Julius Nyerere International Airport Terminal III when completed*

# Chapter 2: Analysis of the survey results

## 2.0 Introduction

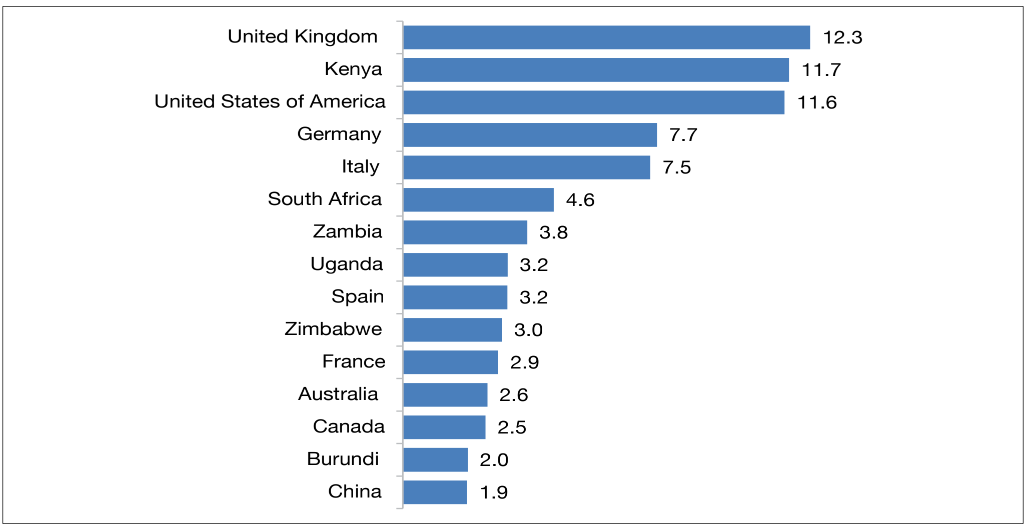
This chapter presents the main findings of the international visitors' exit survey conducted in 2016. The main issues covered include tourism earnings and expenditure, source markets, age group, gender and purpose of visit. Furthermore, main tourism activities, visitors' impression and areas that need improvement are also discussed.

## 2.1 Source markets

The survey findings show that, a total of 16,639 visitors to the United Republic of Tanzania (URT) were recorded from 122 source markets. The top 15 source markets accounted for 80.4 percent of the total visitors. The largest number of visitors was from the United Kingdom accounting for 12.3 percent of total visitors, followed by Kenya and the United States of America with 11.7 percent and 11.6 percent, respectively (**Chart 2.1**). The findings also show a notable increase in the number of visitors from Kenya, which increased its share from 9.7 percent in 2015 to 11.7 percent, making it the second largest source market for Tanzania in 2016. The position of Kenya is largely associated with its proximity to Tanzania as most Kenyans came to visit their friends and relatives. When compared with the survey conducted in 2015, there are new entrants into the top 15 source markets from the East African countries namely Burundi and Uganda, which replaced the Netherlands and Switzerland.

**Chart 2.1: Top 15 source markets for the URT**

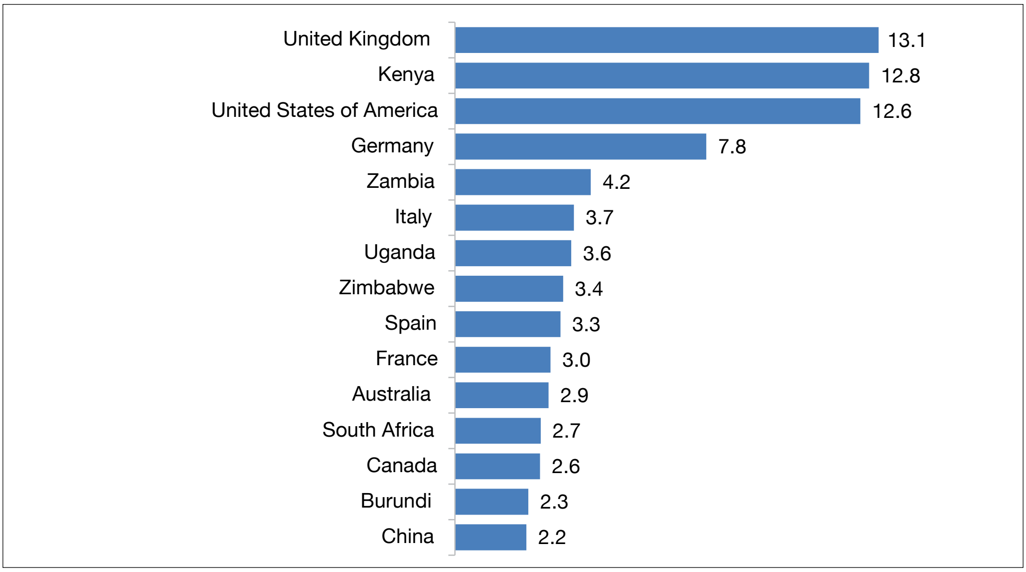
*Percent*



In the case of Tanzania Mainland, the top 15 source markets accounted for about 80.0 percent compared to 76.5 percent recorded in the 2015 survey. The leading source markets are the United Kingdom, followed by Kenya and the United States of America (**Chart 2.2**). Most of the top 15 source markets remained the same with slight changes in positions of some countries such as Kenya, Zambia and Uganda.

**Chart 2.2: Top 15 source markets for Tanzania Mainland**

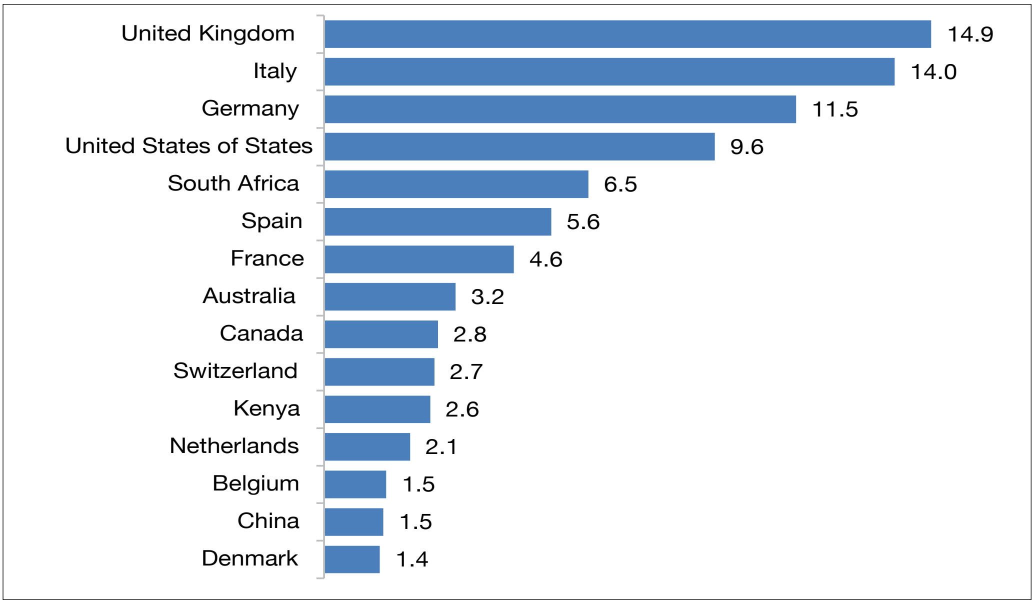
*Percent*




In the case of Zanzibar, the top 15 source markets accounted for 84.3 percent in 2016 compared to 82.4 percent in 2015. Similarly, the list of the top 15 source markets changed slightly whereby Italy has been replaced by the United Kingdom in the leading position. The top 15 source markets have remained the same except Denmark, which has replaced the United Arab Emirates (**Chart 2.3**).

### Chart 2.3: Top 15 source markets for Zanzibar

*Percent*

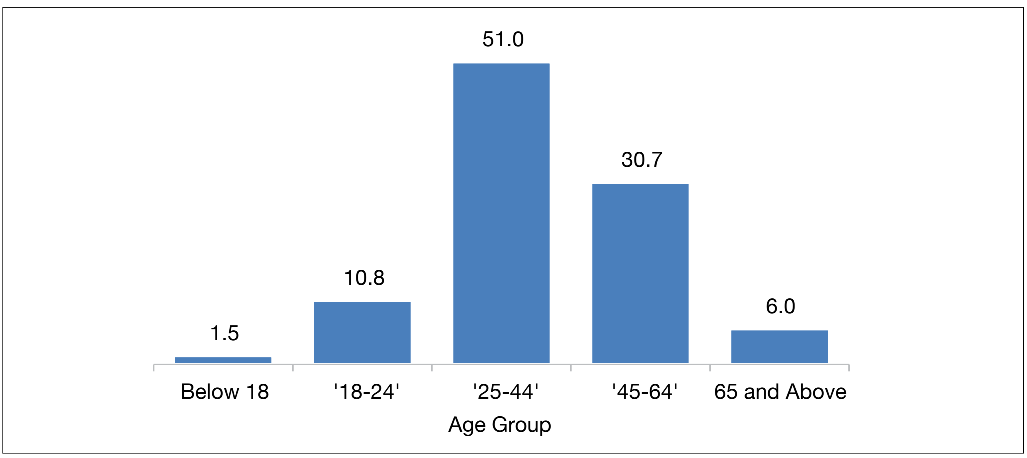



## 2.2 Age group

Similar to the previous surveys, the leading proportion of visitors to Tanzania was in the age group of 25–44 years accounting for 51.0 percent. The second age group was 45–64 years, followed by 18–24 years and those who have 65 years and above. It should be noted that visitors who are 65 years and above continue to be few in spite of having more disposable income and ample time for leisure. Visitors below 18 years accounted for the lowest share (**Chart 2.4**).

### Chart 2.4: Distribution of visitors by age group, URT

*Percent*



The findings further indicate that the majority of the visitors the under age group of 25-44 came from Kenya and the United Kingdom. The second prominent age group was 45-64 with most visitors coming from the United States of America, the United Kingdom and Germany. Visitors in the age of 65 years and above were the least and mainly came from the United States of America and Germany (**Table 2.1**).

**Table 2.1: Distribution of top 15 source markets by age group, URT 2016**

*Percent*

| | Age Group | | | | |
|---|---|---|---|---|---|
| **Country of Residence** | **Below 18** | **18-24** | **25-44** | **45-64** | **65 and Above** |
| United Kingdom | 25.3 | 18.2 | 9.3 | 11.0 | 7.6 |
| Kenya | 14.6 | 15.2 | 13.1 | 7.9 | 4.4 |
| United States of America | 6.5 | 7.5 | 8.1 | 14.7 | 44.1 |
| Germany | 7.9 | 8.9 | 5.5 | 10.6 | 9.4 |
| Italy | 7.5 | 6.2 | 7.8 | 8.7 | 2.6 |
| South Africa | 2.9 | 1.3 | 5.3 | 6.2 | 1.9 |
| Zambia | 3.4 | 2.3 | 5.4 | 2.6 | 0.3 |
| Uganda | 4.1 | 1.5 | 4.2 | 2.2 | 1.4 |
| Spain | 2.6 | 2.6 | 4.0 | 2.6 | 0.6 |
| Zimbabwe | 1.0 | 1.7 | 5.0 | 1.4 | 0.0 |
| France | 3.9 | 2.1 | 3.2 | 2.7 | 1.5 |
| Australia | 0.4 | 1.2 | 1.9 | 4.4 | 6.3 |
| Canada | 2.8 | 3.7 | 1.8 | 2.9 | 3.3 |
| Burundi | 1.6 | 6.6 | 1.7 | 0.6 | 0.1 |
| China | 1.1 | 2.1 | 2.8 | 0.9 | 0.4 |
| Others | 14.4 | 18.9 | 20.9 | 20.5 | 16.0 |
| **Total** | 100 | 100 | 100 | 100 | 100 |
| **Number of Visitors** | **1,551** | **2,224** | **7,655** | **4,283** | **926** |

Similar to the preceding surveys, the age group of 25–44 years took the lead in leisure and holidays and business activities. The majority of visitors at the age of 65 years and above came for leisure and holidays as well as visiting friends and relatives (**Table 2.2**).

**Table 2.2: Age group and purpose of visit, URT 2016**

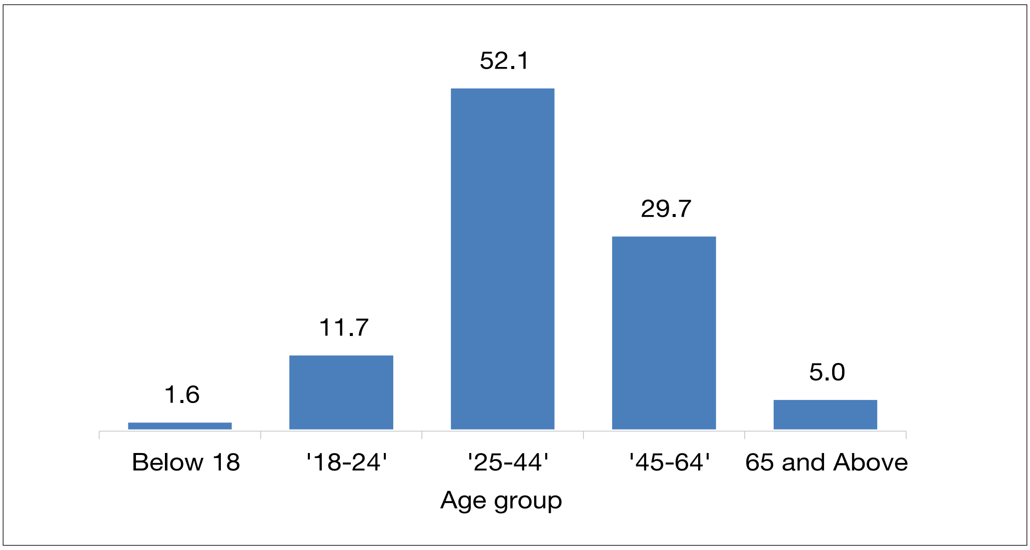
*Percent*

| | Purpose of Visit | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| **Age group** | **Leisure and holidays** | **Visiting friends and relatives** | **Business** | **Meetings and conferences** | **Scientific and academic** | **Volunteering** | **Religion** | **Other** | **Total** |
| Below 18 | 58.6 | 31.1 | 1.9 | 1.9 | 3.5 | 2.5 | 0.3 | 0.1 | 100.0 |
| 18-24 | 54.9 | 20.5 | 6.5 | 1.0 | 7.4 | 8.6 | 1.0 | 0.0 | 100.0 |
| 25-44 | 56.1 | 17.7 | 16.4 | 6.4 | 1.7 | 1.3 | 0.4 | 0.1 | 100.0 |
| 45-64 | 66.0 | 14.5 | 8.6 | 8.0 | 1.1 | 0.9 | 0.5 | 0.2 | 100.0 |
| 65 and Above | 76.3 | 14.4 | 3.0 | 3.9 | 0.5 | 0.9 | 0.9 | 0.1 | 100.0 |
| **Total** | **59.9** | **18.3** | **11.0** | **5.5** | **2.4** | **2.2** | **0.5** | **0.1** | **100.0** |

Out of 6,895 visitors to Zanzibar, the largest proportion was at the age group of 25–44, which accounted for 52.1 percent (**Chart 2.5**). Visitors under the age group of 65 years and above and below 18 years were the least accounting for 5.0 percent and 1.6 percent respectively.

### Chart 2.5: Distribution of visitors by age group, Zanzibar 2016

*Percent*




Further, the results show that majority of the visitors under all age groups in Zanzibar came for leisure and holidays (**Table 2.3**).

### Table 2.3: Age group and purpose of visit, Zanzibar, 2016

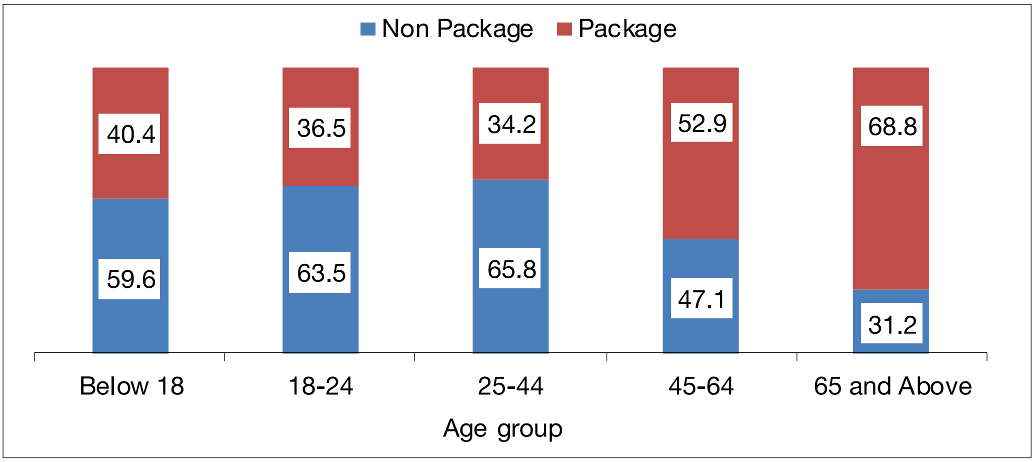
*Percent*

| | Purpose of Visit | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Age group | Business | Leisure and holidays | Visiting friends and relatives | Volunteering | Meetings and conferences | Scientific and academic | Religion | Total |
| Below 18 | 0.0 | 84.7 | 13.7 | 1.1 | 0.3 | 0.0 | 0.3 | 100.0 |
| 18-24 | 0.5 | 80.2 | 8.5 | 9.3 | 0.7 | 0.5 | 0.2 | 100.0 |
| 25-44 | 1.3 | 88.2 | 7.3 | 1.5 | 1.7 | 0.0 | 0.0 | 100.0 |
| 45-64 | 0.8 | 89.4 | 6.4 | 0.7 | 2.1 | 0.4 | 0.3 | 100.0 |
| 65 and Above | 1.6 | 84.6 | 10.5 | 1.6 | 1.3 | 0.0 | 0.3 | 100.0 |
| **Total** | **0.9** | **86.8** | **8.1** | **2.4** | **1.5** | **0.2** | **0.1** | **100.0** |

**Chart 2.6** reveals that the majority of the visitors with the age group of 25–44, came under the non-package tour arrangement. Visitors of the age below 24 years preferred the non-package tour arrangement while visitors above 44 years of age had higher preference for the package tour arrangement.

**Chart 2.6: Tour arrangement by age group, URT 2016**

*Percent*

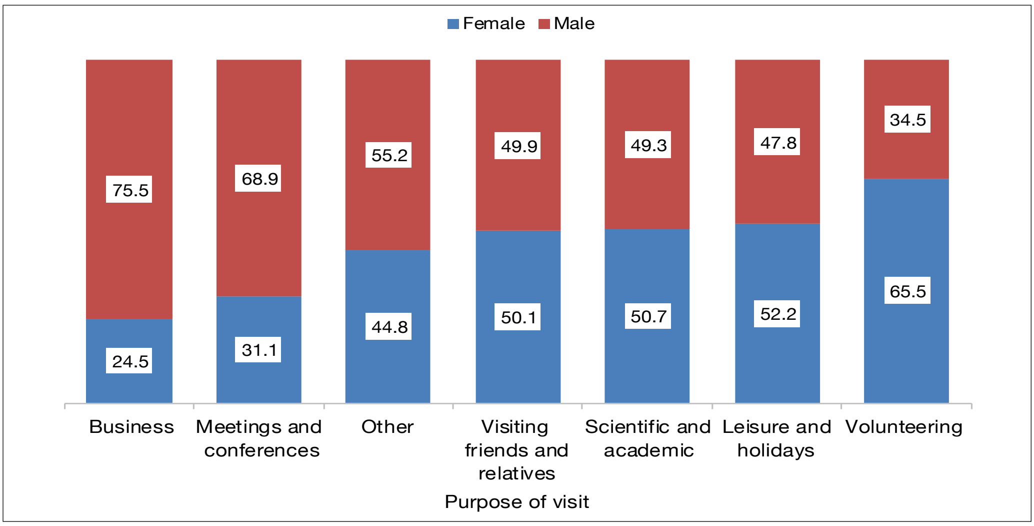



## 2.3 Gender

Survey results show that about 52 percent of visitors to the United Republic of Tanzania (URT) were male and 48.0 percent were female. There was a reasonable gender balance between men and women and the trend has been consistent over the previous surveys. In the case of Zanzibar, female visitors dominated by recording 54.1 percent compared with 45.9 percent for males. For the case of URT, the findings indicate that female visitors mainly came for leisure and holidays, scientific and academic as well as volunteering. Male visitors were dominant in business, meetings and conferences and religious purposes (**Chart 2.7**).

**Chart 2.7: Visitors by gender and purpose of visit, URT**

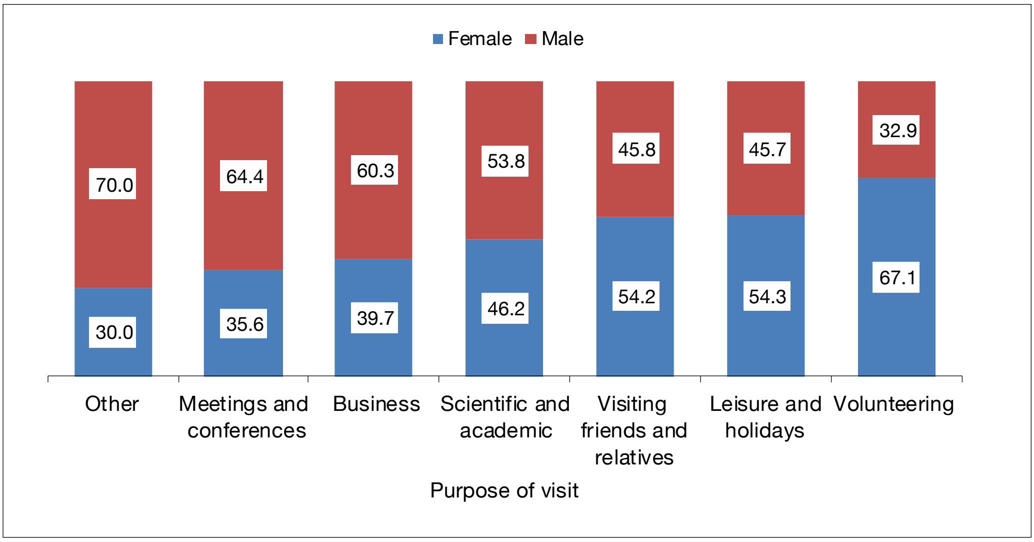
*Percent*



Results show that in terms of purpose of visit by gender in Zanzibar, male visitors mainly came for business, meeting and conferences and scientific and academic. Female visitors mainly came for leisure and holiday, visiting friends and relatives and volunteering (**Chart 2.8)**

**Chart 2.8: Visitors by gender and purpose of visit, Zanzibar**

*Percent*

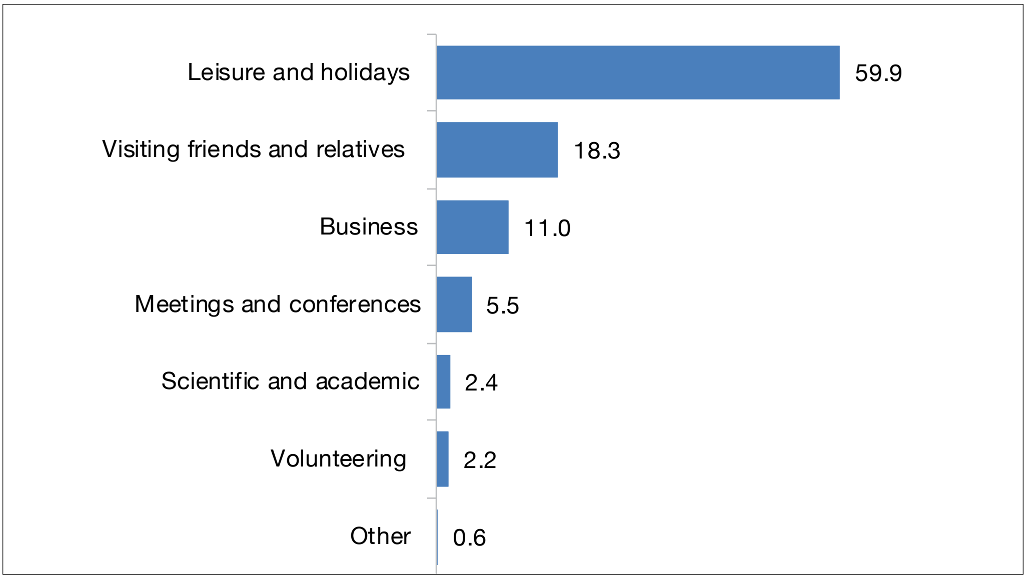



## 2.4 Purpose of visit

The survey results revealed that the majority who visited Tanzania (59.9 percent) came for leisure and holidays, followed by those who came to visit friends and relatives and for business purpose (**Chart 2.9**). Visitors who came for meetings and conferences were the least. The dominance of holidaymakers was also experienced in the previous surveys. Likewise, the share of business visitors almost doubled in 2016 compared to the number recorded in 2011. This performance is associated with conducive business environment, and cross-border trade and investment.

### Chart 2.9: Purpose of visit URT, 2016

*Percent*




The majority of visitors from the top 15 source markets to Tanzania who came for leisure and holidays were from the United States of America, the United Kingdom, Italy and Germany (**Table 2.4**). Tourists who came to visit friends and relatives were mainly from Kenya and the United Kingdom. Visitors from Zambia and Zimbabwe mostly came for business.

### Table 2.4: Distribution of top 15 source markets by purpose of visit, URT

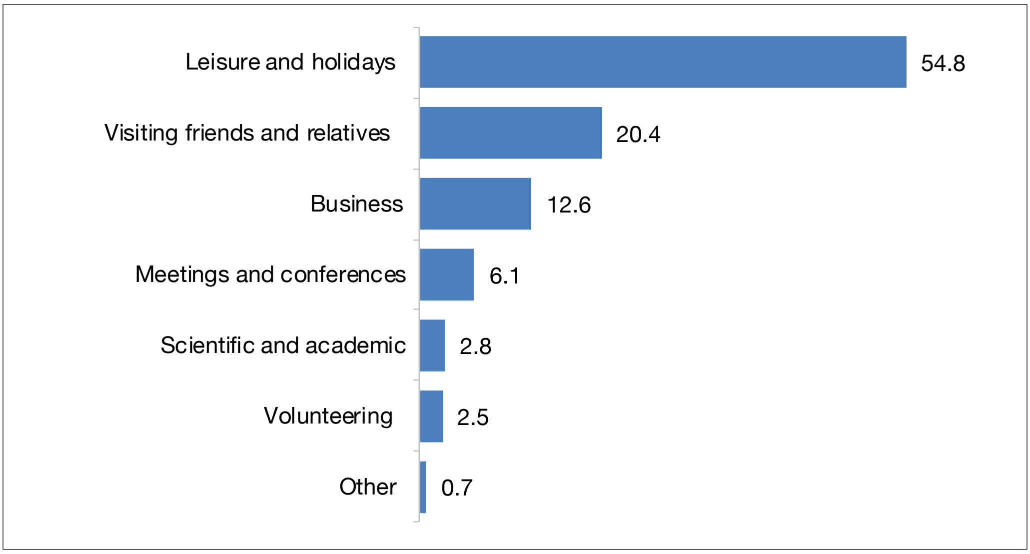
*Percent*

| | Purpose of Visit | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Country of Residence | Leisure and holidays | Visiting friends and relatives | Business | Meetings and conferences | Scientific and academic | Volunteering | Religion | Other | Grand total |
| United Kingdom | 16.7 | 18.3 | 3.4 | 10.2 | 4.5 | 41.9 | 6.3 | 12.5 | 15.4 |
| Kenya | 5.7 | 34.9 | 14.3 | 30.5 | 42.9 | 0.7 | 38.0 | 37.5 | 14.6 |
| United States of America | 19.2 | 7.9 | 4.4 | 13.0 | 6.2 | 8.3 | 6.3 | 12.5 | 14.4 |
| Germany | 13.2 | 5.7 | 1.6 | 3.0 | 4.2 | 7.6 | 13.9 | 0.0 | 9.6 |
| Italy | 13.6 | 2.8 | 1.4 | 0.9 | 0.3 | 20.1 | 8.9 | 0.0 | 9.3 |
| South Africa | 6.1 | 2.1 | 6.7 | 17.2 | 0.6 | 0.7 | 1.3 | 6.3 | 5.7 |
| Zambia | 1.1 | 2.6 | 25.0 | 6.2 | 14.8 | 0.0 | 7.6 | 6.3 | 4.7 |
| Uganda | 0.5 | 9.7 | 7.6 | 8.4 | 18.5 | 0.3 | 10.1 | 0.0 | 3.9 |
| Spain | 5.8 | 0.7 | 0.3 | 1.3 | 0.6 | 12.2 | 0.0 | 0.0 | 3.9 |
| Zimbabwe | 1.0 | 2.1 | 23.9 | 1.5 | 0.0 | 0.3 | 0.0 | 0.0 | 3.7 |
| France | 5.2 | 1.2 | 0.9 | 1.2 | 0.0 | 3.6 | 0.0 | 18.8 | 3.6 |
| Australia | 4.8 | 0.7 | 0.7 | 1.3 | 0.3 | 2.3 | 1.3 | 0.0 | 3.2 |
| Canada | 3.6 | 3.9 | 0.9 | 1.2 | 1.4 | 1.0 | 3.8 | 6.3 | 3.1 |
| Burundi | 1.0 | 6.0 | 5.8 | 0.7 | 0.0 | 0.0 | 1.3 | 0.0 | 2.4 |
| China | 2.5 | 1.5 | 3.0 | 3.3 | 5.9 | 1.0 | 1.3 | 0.0 | 2.4 |
| **Grand total** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** |
| **Number of Visitors** | **7,913** | **2,547** | **1,483** | **675** | **357** | **303** | **79** | **16** | **13,373** |

In the case of Tanzania Mainland, the leading purpose of visit was also leisure and holidays followed by visiting friends and relatives and business (**Chart 2.10**).

**Chart 2.10: Purpose of visit Tanzania Mainland, 2016**

*Percent*




The pattern of purpose of visit of the top 15 source markets for Tanzania Mainland is similar to that of URT with slight changes in dominance (**Table 2.5**).

**Table 2.5: Distribution of top 15 source markets by purpose of visit, Tanzania Mainland**

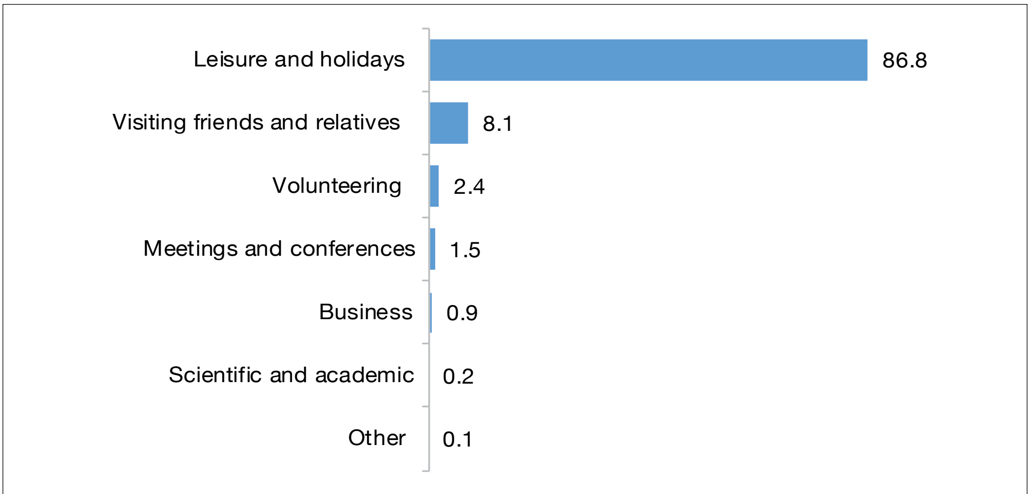
*Percent*

| | Purpose of visit | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Country of Residence | Leisure and holidays | Visiting friends and relatives | Business | Meetings and conferences | Scientific and academic | Volunteering | Religion | Other | Grand total |
| United Kingdom | 18.9 | 18.2 | 3.5 | 10.5 | 4.5 | 43.5 | 6.3 | 12.5 | 16.4 |
| Kenya | 5.9 | 35.9 | 14.3 | 31.0 | 42.9 | 0.7 | 38.0 | 37.5 | 16.0 |
| United States of America | 22.7 | 7.8 | 4.4 | 13.6 | 6.2 | 8.2 | 6.3 | 12.5 | 15.7 |
| Germany | 14.4 | 5.8 | 1.5 | 3.1 | 4.2 | 6.5 | 13.9 | 0.0 | 9.7 |
| Zambia | 1.1 | 2.6 | 25.2 | 6.4 | 14.8 | 0.0 | 7.6 | 6.3 | 5.3 |
| Italy | 6.6 | 1.4 | 1.2 | 0.5 | 0.3 | 20.2 | 8.9 | 0.0 | 4.6 |
| Uganda | 0.5 | 10.0 | 7.6 | 8.6 | 18.5 | 0.3 | 10.1 | 0.0 | 4.5 |
| Zimbabwe | 1.0 | 2.2 | 24.1 | 1.6 | 0.0 | 0.3 | 0.0 | 0.0 | 4.2 |
| Spain | 6.5 | 0.8 | 0.3 | 1.4 | 0.6 | 11.3 | 0.0 | 0.0 | 4.1 |
| France | 5.9 | 1.1 | 0.9 | 1.1 | 0.0 | 3.8 | 0.0 | 18.8 | 3.7 |
| Australia | 6.0 | 0.7 | 0.7 | 1.2 | 0.3 | 2.4 | 1.3 | 0.0 | 3.6 |
| South Africa | 2.1 | 2.0 | 6.5 | 15.8 | 0.6 | 0.7 | 1.3 | 6.3 | 3.3 |
| Canada | 4.1 | 3.8 | 1.0 | 1.1 | 1.4 | 1.0 | 3.8 | 6.3 | 3.3 |
| Burundi | 1.3 | 6.2 | 5.8 | 0.8 | 0.0 | 0.0 | 1.3 | 0.0 | 2.8 |
| China | 3.0 | 1.6 | 3.0 | 3.4 | 5.9 | 1.0 | 1.3 | 0.0 | 2.8 |
| **Grand total** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** |

In Zanzibar, the same pattern was observed, whereby visitors who came for leisure and holidays purpose were dominant. The rest of the purposes recorded less than ten percent each (**Chart 2.11**).

### Chart 2.11: Purpose of visit Zanzibar, 2016

*Percent*




The majority of visitors who came for leisure and holidays in Zanzibar were from Italy, the United Kingdom, Germany and the United States of America (**Table 2.6**). Under the business category, the majority of visitors were from South Africa and the United States of America.

### Table 2.6: Distribution of top 15 source markets by purpose of visit, Zanzibar

*Percent*

| Top 15 Source Markets | Purpose of Visit | | | | | | | Grand Total |
|---|---|---|---|---|---|---|---|---|
| | Leisure and Holidays | Visiting Friends and Relatives | Business | Meetings and Conference | Scientific and Academic | Volunteering | Religion | |
| United Kingdom | 15.8 | 31.7 | 4.3 | 23.6 | 8.3 | 35.5 | 40.0 | 17.6 |
| Italy | 17.6 | 10.3 | 8.5 | 4.2 | 0.0 | 10.6 | 0.0 | 16.5 |
| Germany | 14.1 | 13.4 | 4.3 | 2.8 | 41.7 | 6.4 | 20.0 | 13.7 |
| United States of America | 11.2 | 13.4 | 25.5 | 9.7 | 0.0 | 5.0 | 10.0 | 11.3 |
| South Africa | 7.9 | 2.6 | 25.5 | 31.9 | 0.0 | 0.0 | 0.0 | 7.7 |
| Spain | 6.9 | 3.0 | 2.1 | 0.0 | 0.0 | 12.1 | 0.0 | 6.6 |
| France | 5.9 | 1.7 | 2.1 | 1.4 | 0.0 | 6.4 | 0.0 | 5.5 |
| Australia | 4.2 | 0.9 | 0.0 | 1.4 | 0.0 | 4.3 | 0.0 | 3.8 |
| Canada | 3.1 | 6.7 | 4.3 | 1.4 | 0.0 | 0.0 | 30.0 | 3.3 |
| Switzerland | 3.3 | 2.2 | 0.0 | 1.4 | 0.0 | 5.7 | 0.0 | 3.2 |
| Kenya | 2.4 | 8.0 | 12.8 | 19.4 | 0.0 | 0.0 | 0.0 | 3.1 |
| Netherlands | 2.7 | 1.1 | 6.4 | 1.4 | 8.3 | 0.0 | 0.0 | 2.5 |
| Belgium | 1.8 | 1.7 | 2.1 | 0.0 | 25.0 | 0.7 | 0.0 | 1.8 |
| China | 1.7 | 1.9 | 2.1 | 0.0 | 0.0 | 2.1 | 0.0 | 1.7 |
| Denmark | 1.3 | 1.5 | 0.0 | 1.4 | 16.7 | 11.3 | 0.0 | 1.6 |
| **Grand Total** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** |

## 2.5 Travel arrangement

The survey findings indicate that 58.2 percent of the tourists who visited Tanzania in 2016 came under the non-package travel arrangement. The same pattern was observed in 2015. Furthermore, the majority of visitors the from Burundi, Zimbabwe, Uganda and Zambia came under the non-package tour arrangement, while those from Australia, Italy and the United States of America came under the package tour arrangement (**Table 2.7**).

**Table 2.7: Proportion of visitors by source markets by travel arrangement, URT**

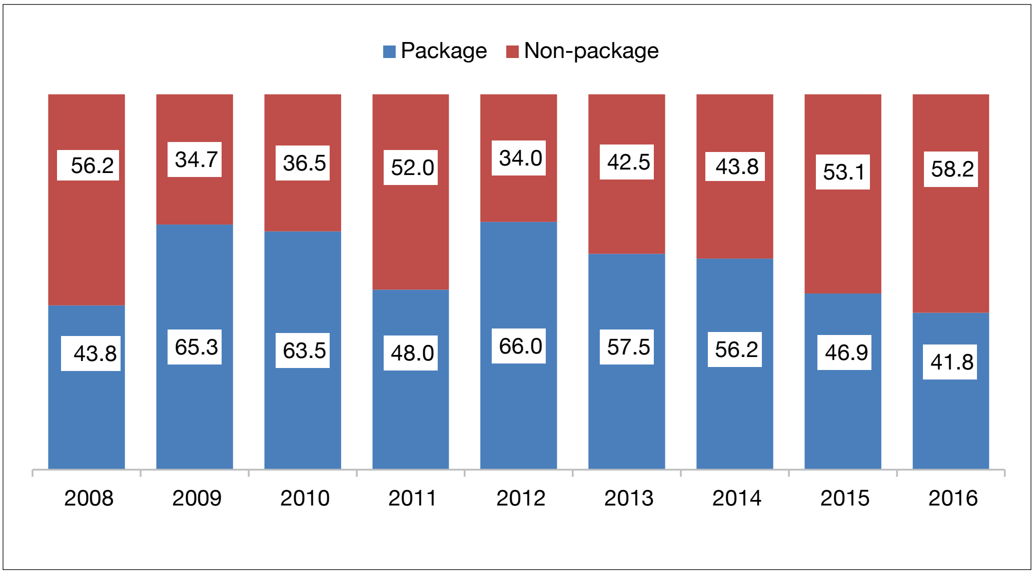
*Percent*

| Top 15 Source Markets | Travel Arrangement (Percent) | | Total Visitors |
|---|---|---|---|
| | Non-package | Package | |
| United Kingdom | 55.6 | 44.4 | 2,054 |
| Kenya | 86.9 | 13.1 | 1,947 |
| United States of America | 36.2 | 63.8 | 1,925 |
| Germany | 40.3 | 59.7 | 1,281 |
| Italy | 27.6 | 72.4 | 1,248 |
| South Africa | 41.5 | 58.5 | 761 |
| Zambia | 93.0 | 7.0 | 627 |
| Uganda | 96.4 | 3.6 | 528 |
| Spain | 49.9 | 50.1 | 527 |
| Zimbabwe | 96.4 | 3.6 | 500 |
| France | 42.8 | 57.2 | 481 |
| Australia | 21.8 | 78.2 | 426 |
| Canada | 53.0 | 47.0 | 417 |
| Burundi | 99.7 | 0.3 | 327 |
| China | 52.8 | 47.2 | 324 |
| Others | 64.9 | 35.1 | 3,266 |

The non-package visitors have dominated in 2015 and 2016 compared to the package visitors (**Chart 2.12**). The dominance of the non-package was also observed in 2008 and 2011, following the global financial crisis and sovereign debt crisis in the Euro Zone, respectively.

**Chart 2.12: Trends in tour arrangements, 2008-2016**

*Percent*

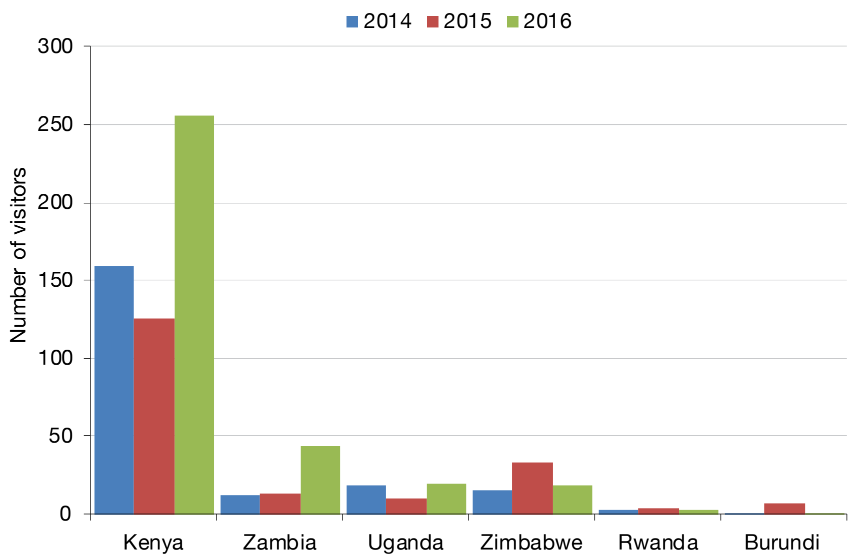



The change of dominance to the non-package tour arrangement is partly explained by the increase in the number of visitors from the neighboring countries namely Kenya, Zambia, Zimbabwe, Uganda, Burundi and Uganda. The results revealed that, there was an increase in visitors from the neighboring countries in the last two years who usually come under the non-package arrangement. Meanwhile, the number of visitors the under package tour arrangement from these countries remained more or less the same with the exception of Kenya and Zambia. **Chart 2.13** shows the trend of visitors by travel arrangement for the last three years.

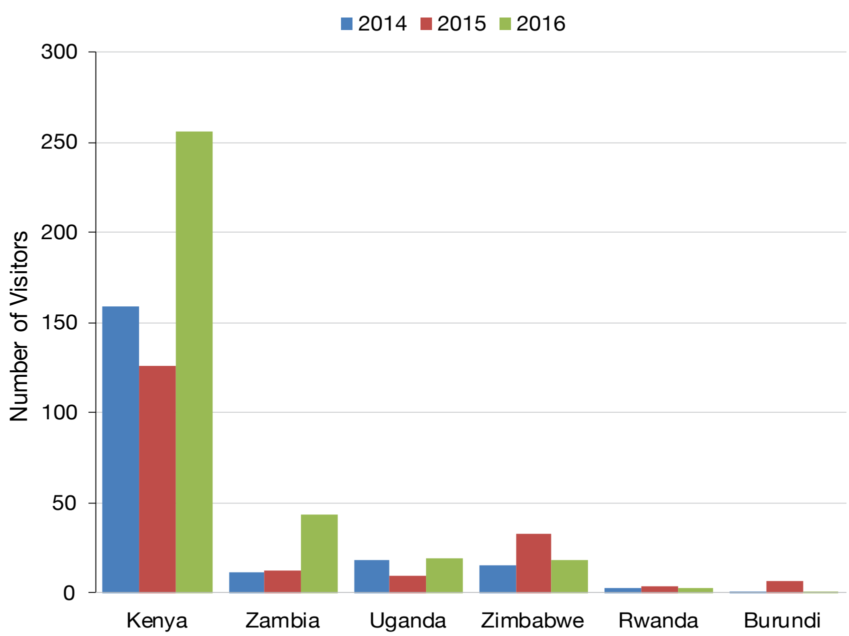
**Chart 2.13: Visitors from Neighbouring countries by travel arrangement**

*Number of visitors*

**Non-Package**



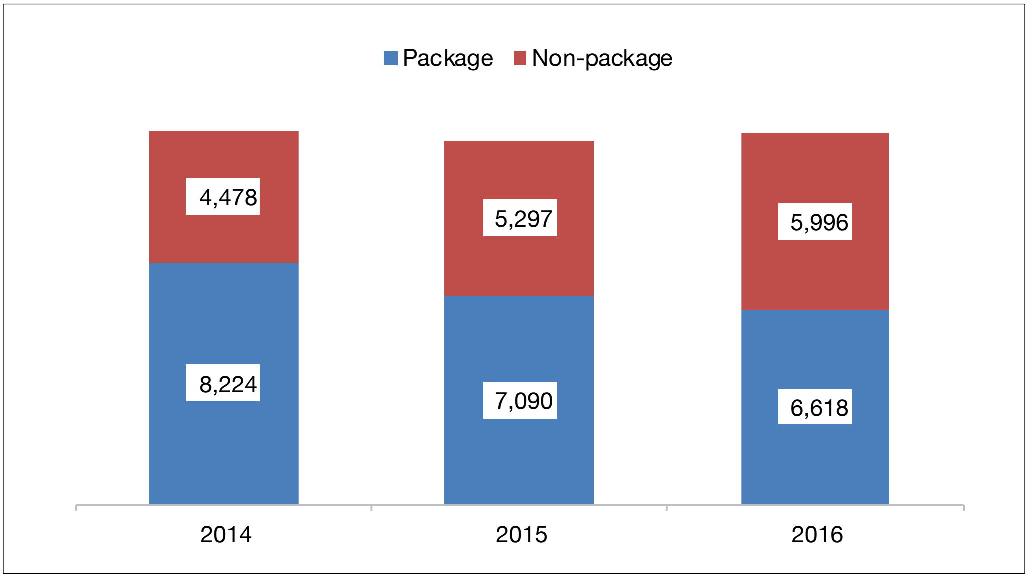

**Package**



When the neighboring countries were excluded from the list of visitors, the dominance of the package visitors from long haul source market continued to persists (**Chart 2.14**). This implies that the international phenomenon has not changed rather there has been increase in visitors regionally particularly for meetings, business as well as visiting friends and relatives. It is worth noting that, over time the proportion of non-package visitors has been increasing.

**Chart 2.14: Visitors by travel arrangement excluding those from neighbouring countries, URT**

*Number of visitors*



For Zanzibar, the majority of visitors (57.8 percent) came under the package tour arrangement while the rest used non-package tour arrangement. Visitors with higher preference for the package tour arrangement mainly came from Italy, South Africa and Australia. Those from Kenya, Belgium and Denmark preferred the non-package tour arrangement (**Table 2.8**).

**Table 2.8: Proportion of visitors by sources markets by travel arrangement, Zanzibar**

| Top 15 Source Markets | Travel Arrangement (Percent) | | Total Visitors |
|---|---|---|---|
| | Non-package | Package | |
| United Kingdom | 48.8 | 51.2 | 1,024 |
| Italy | 18.4 | 81.6 | 962 |
| Germany | 36.8 | 63.2 | 796 |
| United States of America | 40.5 | 59.5 | 659 |
| South Africa | 19.1 | 80.9 | 446 |
| Spain | 46.5 | 53.5 | 383 |
| France | 45.9 | 54.1 | 320 |
| Australia | 21.2 | 78.8 | 222 |
| Canada | 52.6 | 47.4 | 192 |
| Switzerland | 39.2 | 60.8 | 186 |
| Kenya | 69.3 | 30.7 | 179 |
| Netherlands | 49.7 | 50.3 | 145 |
| Belgium | 63.8 | 36.2 | 105 |
| China | 35.0 | 65.0 | 100 |
| Denmark | 54.3 | 45.7 | 94 |

**Table 2.9** indicates that holidaymakers preferred the package tour arrangement compared to other purposes of visit.

**Table 2.9: Distribution of visitors by tour arrangement by purpose of visit, URT**

*Percent*

| Tour Arrangement | Purpose of Visit | | | | | | | | Grand total |
|---|---|---|---|---|---|---|---|---|---|
| | Leisure and holidays | Visiting friends and relatives | Business | Meetings and conferences | Scientific and academic | Volunteering | Religion | Other | |
| Non - Package | 36.7 | 94.5 | 95.9 | 84.7 | 57.2 | 80.2 | 82.6 | 84.2 | 9,680 |
| Package | 63.3 | 5.5 | 4.1 | 15.3 | 42.8 | 19.8 | 17.4 | 15.8 | 6,959 |
| Total | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 16,639 |

The same pattern was observed for the tour arrangement and purpose of visit for Zanzibar (**Table 2.10**).

### Table 2.10: Distribution of visitors by tour arrangement by purpose of visit, Zanzibar

*Percent*

| | Purpose of Visit | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Tour Arrangement | Leisure and holidays | Visiting friends and relatives | Volunteering | Meetings and conferences | Business | Scientific and academic | Religion | Grand total |
| Non - Package | 36.1 | 85.3 | 79.9 | 77.2 | 81.0 | 69.2 | 60.0 | 2,909 |
| Package | 63.9 | 14.7 | 20.1 | 22.8 | 19.0 | 30.8 | 40.0 | 3,986 |
| Total | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 6,895 |

**Table 2.11** indicates that under the non-package tour arrangement, the United Kingdom led in bringing more visitors for leisure and holidays, while those who came to visit friends and relatives were mostly from Kenya. Under business category, the majority of the visitors were from Zambia and Zimbabwe. The dominance of Zambia and Zimbabwe is partly explained by their utilization of the Dar es Salaam port for imports and exports of goods.

### Table 2.11: Distribution of visitors under the non-package by purpose of visit, URT

*Percent*

| | Purpose of visit | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Country of residence | Leisure and holidays | Visiting friends and relatives | Business | Meetings and conferences | Scientific and academic | Volunteering | Religion | Other |
| United Kingdom | 18.3 | 18.6 | 3.6 | 10.9 | 3.7 | 37.8 | 0.0 | 7.7 |
| Kenya | 13.7 | 36.5 | 14.2 | 32.0 | 16.4 | 0.8 | 43.1 | 46.2 |
| United States of America | 12.6 | 7.8 | 4.4 | 13.8 | 6.9 | 7.6 | 4.6 | 0.0 |
| Germany | 12.2 | 4.9 | 1.6 | 3.2 | 2.1 | 8.8 | 15.4 | 0.0 |
| Italy | 8.5 | 1.7 | 0.6 | 1.1 | 0.5 | 23.5 | 6.2 | 0.0 |
| South Africa | 3.2 | 2.0 | 6.3 | 15.8 | 1.1 | 0.8 | 1.5 | 7.7 |
| Zambia | 3.0 | 2.6 | 25.4 | 3.7 | 26.5 | 0.0 | 9.2 | 7.7 |
| Uganda | 1.0 | 10.2 | 7.7 | 9.3 | 34.9 | 0.4 | 12.3 | 0.0 |
| Spain | 7.7 | 0.8 | 0.2 | 1.2 | 1.1 | 12.0 | 0.0 | 0.0 |
| Zimbabwe | 2.5 | 2.2 | 24.7 | 1.2 | 0.0 | 0.4 | 0.0 | 0.0 |
| France | 5.7 | 0.9 | 1.0 | 1.2 | 0.0 | 4.4 | 0.0 | 23.1 |
| Australia | 2.0 | 0.7 | 0.8 | 1.6 | 0.0 | 1.6 | 0.0 | 0.0 |
| Canada | 4.0 | 3.5 | 1.0 | 1.2 | 2.6 | 0.8 | 4.6 | 7.7 |
| Burundi | 3.1 | 6.4 | 6.0 | 0.7 | 0.0 | 0.0 | 1.5 | 0.0 |
| China | 2.5 | 1.5 | 2.8 | 3.2 | 4.2 | 1.2 | 1.5 | 0.0 |
| **Total** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** |

The majority of business visitors who came to Tanzania under the package tour arrangement were from Italy, South Africa, Kenya and Zambia. Under the leisure and holidays category, the majority of the visitors were from the United States of America, Italy, the United Kingdom and Germany (**Table 2.12**).

**Table 2.12: Distribution of visitors under the package by purpose of visit, URT**

*Percent*

| | Purpose of Visit | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **Top 15 source markets** | **Leisure and Holidays** | **Scientific and academic** | **Visiting friends and relatives** | **Meetings and conferences** | **Business** | **Volunteering** | **Religion** | **Other** |
| United Kingdom | 15.9 | 5.4 | 13.8 | 6.7 | 0.0 | 61.5 | 35.7 | 33.3 |
| Kenya | 1.7 | 72.6 | 9.0 | 22.1 | 16.7 | 0.0 | 14.3 | 0.0 |
| United States of America | 22.5 | 5.4 | 9.0 | 8.7 | 4.2 | 11.5 | 14.3 | 66.7 |
| Germany | 13.7 | 6.5 | 19.3 | 1.9 | 0.0 | 1.9 | 7.1 | 0.0 |
| Italy | 16.2 | 0.0 | 21.4 | 0.0 | 27.1 | 3.8 | 21.4 | 0.0 |
| South Africa | 7.6 | 0.0 | 4.8 | 25.0 | 20.8 | 0.0 | 0.0 | 0.0 |
| Zambia | 0.2 | 1.8 | 1.4 | 20.2 | 14.6 | 0.0 | 0.0 | 0.0 |
| Uganda | 0.2 | 0.0 | 1.4 | 3.8 | 4.2 | 0.0 | 0.0 | 0.0 |
| Spain | 4.8 | 0.0 | 0.0 | 1.9 | 2.1 | 13.5 | 0.0 | 0.0 |
| Zimbabwe | 0.3 | 0.0 | 0.0 | 2.9 | 2.1 | 0.0 | 0.0 | 0.0 |
| France | 5.0 | 0.0 | 6.2 | 1.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Australia | 6.2 | 0.6 | 0.7 | 0.0 | 0.0 | 5.8 | 7.1 | 0.0 |
| Canada | 3.4 | 0.0 | 11.0 | 1.0 | 0.0 | 1.9 | 0.0 | 0.0 |
| Burundi | 0.0 | 0.0 | 0.0 | 1.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| China | 2.4 | 7.7 | 2.1 | 3.8 | 8.3 | 0.0 | 0.0 | 0.0 |
| Total | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |

The survey findings indicate that under the non-package tour arrangement the majority of the visitors, who came to Zanzibar for leisure and holidays, visiting friends and relatives, meetings and conferences and volunteering were from the United Kingdom while Germany and Belgium dominated under the scientific and academic category (**Table 2.13**).

**Table 2.13: Distribution of visitors under the non-package by purpose of visit, Zanzibar**

*Percent*

| | Purpose of Visit | | | | | | |
|---|---|---|---|---|---|---|---|
| Country of Residence | Leisure and Holidays | Visiting Friends and Relatives | Business | Meetings and Conferences | Scientific and Academic | Volunteering | Religion |
| United Kingdom | 18.5 | 35.7 | 5.3 | 28.1 | 12.5 | 40.7 | 0.0 |
| Italy | 8.7 | 5.1 | 2.6 | 5.3 | 0.0 | 12.0 | 0.0 |
| Germany | 14.7 | 9.8 | 5.3 | 3.5 | 37.5 | 8.3 | 33.3 |
| United States of America | 11.4 | 14.9 | 31.6 | 10.5 | 0.0 | 6.5 | 16.7 |
| South Africa | 3.4 | 2.1 | 21.1 | 26.3 | 0.0 | 0.0 | 0.0 |
| Spain | 9.4 | 3.6 | 2.6 | 0.0 | 0.0 | 10.2 | 0.0 |
| France | 7.9 | 2.1 | 2.6 | 1.8 | 0.0 | 8.3 | 0.0 |
| Australia | 2.4 | 1.0 | 0.0 | 1.8 | 0.0 | 3.7 | 0.0 |
| Canada | 4.3 | 6.7 | 5.3 | 1.8 | 0.0 | 0.0 | 50.0 |
| Switzerland | 3.5 | 2.6 | 0.0 | 1.8 | 0.0 | 4.6 | 0.0 |
| Kenya | 4.5 | 9.5 | 15.8 | 15.8 | 0.0 | 0.0 | 0.0 |
| Netherlands | 4.0 | 1.3 | 2.6 | 1.8 | 12.5 | 0.0 | 0.0 |
| Belgium | 3.4 | 2.1 | 2.6 | 0.0 | 37.5 | 0.9 | 0.0 |
| China | 1.5 | 1.8 | 2.6 | 0.0 | 0.0 | 2.8 | 0.0 |
| Denmark | 2.5 | 1.8 | 0.0 | 1.8 | 0.0 | 1.9 | 0.0 |
| **Total** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** |

**Table 2.14** indicates that the majority of the visitors to Zanzibar who came for leisure and holidays as well as visiting friends and relatives under the package tour arrangement were from Italy and Germany. South Africa dominated in the business, meetings and conferences categories. The majority of the visitors from Denmark, Spain and the United Kingdom came for volunteering purposes.

**Table 2.14: Distribution of visitors under the package by purpose of visit, Zanzibar**

*Percent*

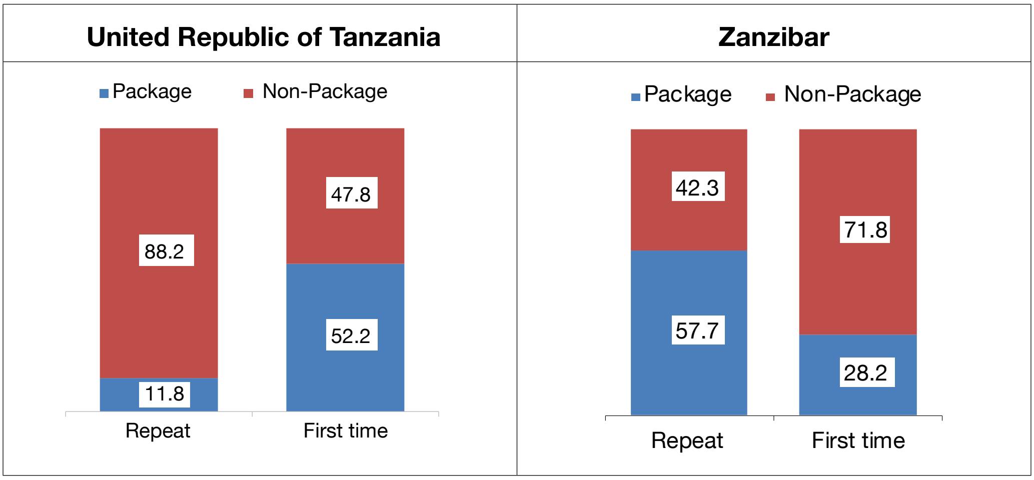
| | Purpose of Visit | | | | | | |
|---|---|---|---|---|---|---|---|
| **Top 15 Source markets** | **Leisure and holidays** | **Visiting friends and relatives** | **Volunteering** | **Meetings and conferences** | **Business** | **Religion** | **Scientific and academic** |
| United Kingdom | 14.6 | 10.7 | 18.2 | 6.7 | 0.0 | 100.0 | 0.0 |
| Italy | 21.8 | 37.3 | 6.1 | 0.0 | 33.3 | 0.0 | 0.0 |
| Germany | 13.8 | 32.0 | 0.0 | 0.0 | 0.0 | 0.0 | 50.0 |
| United States of America | 11.2 | 5.3 | 0.0 | 6.7 | 0.0 | 0.0 | 0.0 |
| South Africa | 10.0 | 5.3 | 0.0 | 53.3 | 44.4 | 0.0 | 0.0 |
| Spain | 5.8 | 0.0 | 18.2 | 0.0 | 0.0 | 0.0 | 0.0 |
| France | 5.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Australia | 5.0 | 0.0 | 6.1 | 0.0 | 0.0 | 0.0 | 0.0 |
| Canada | 2.5 | 6.7 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Switzerland | 3.2 | 0.0 | 9.1 | 0.0 | 0.0 | 0.0 | 0.0 |
| Kenya | 1.4 | 0.0 | 0.0 | 33.3 | 0.0 | 0.0 | 0.0 |
| Netherlands | 2.1 | 0.0 | 0.0 | 0.0 | 22.2 | 0.0 | 0.0 |
| Belgium | 1.1 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| China | 1.8 | 2.7 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Denmark | 0.8 | 0.0 | 42.4 | 0.0 | 0.0 | 0.0 | 50.0 |
| Total | 100 | 100 | 100 | 100 | 100 | 100 | 100 |

## 2.6 First-time and repeat visit

The survey findings indicate that 54.7 percent of all the interviewees were first-time visitors, while 45.3 percent were repeat visitors. Out of the total first-time visitors, 52.2 percent came under the package tour arrangement, while the rest used the non-package tour arrangement (**Chart 2.15**). The majority of the repeat visitors (88.2 percent) came under the non–package tour arrangement. Preference for the non-package tour arrangement among the repeat visitors could be related with the familiarity of the destination given that most of the visitors came from the neighboring countries. For the case of Zanzibar, the majority of the repeat visitors came under the package tour arrangement.

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

*Percent*




Furthermore, the results show that with the exception of Kenya, Uganda, Burundi, Zambia and Zimbabwe, the majority of visitors from the top 15 source markets were first-timers (**Chart 2.16**). Neighboring countries led in repeat visitors, largely because of the growing business relations and family ties between Tanzania and these countries.

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

*Percent*

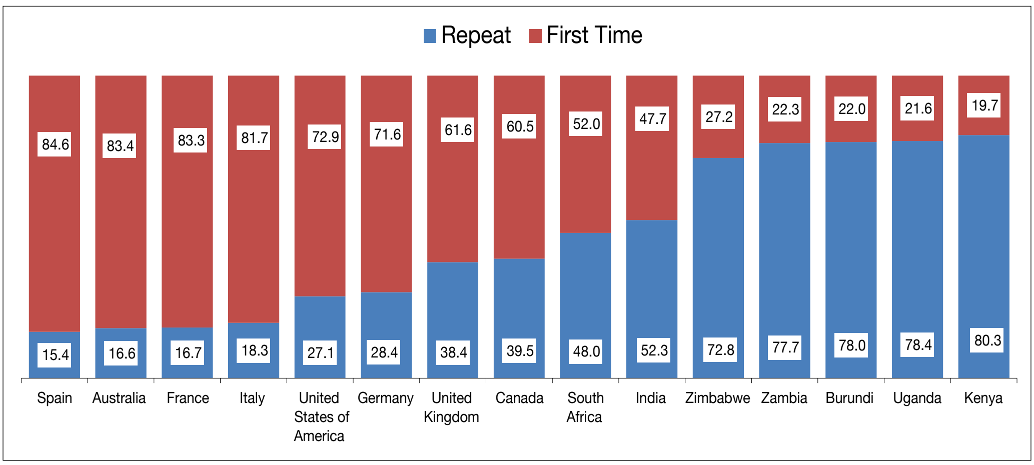


**Table 2.15** reveals that most of the tourists who were first-time visitors came for leisure and holidays. Meanwhile, the majority of repeat visitors came to visit relatives and for business purposes. Other categories such as religion, volunteering, scientific and academic had the lowest percent for both first-time and repeat visitors.

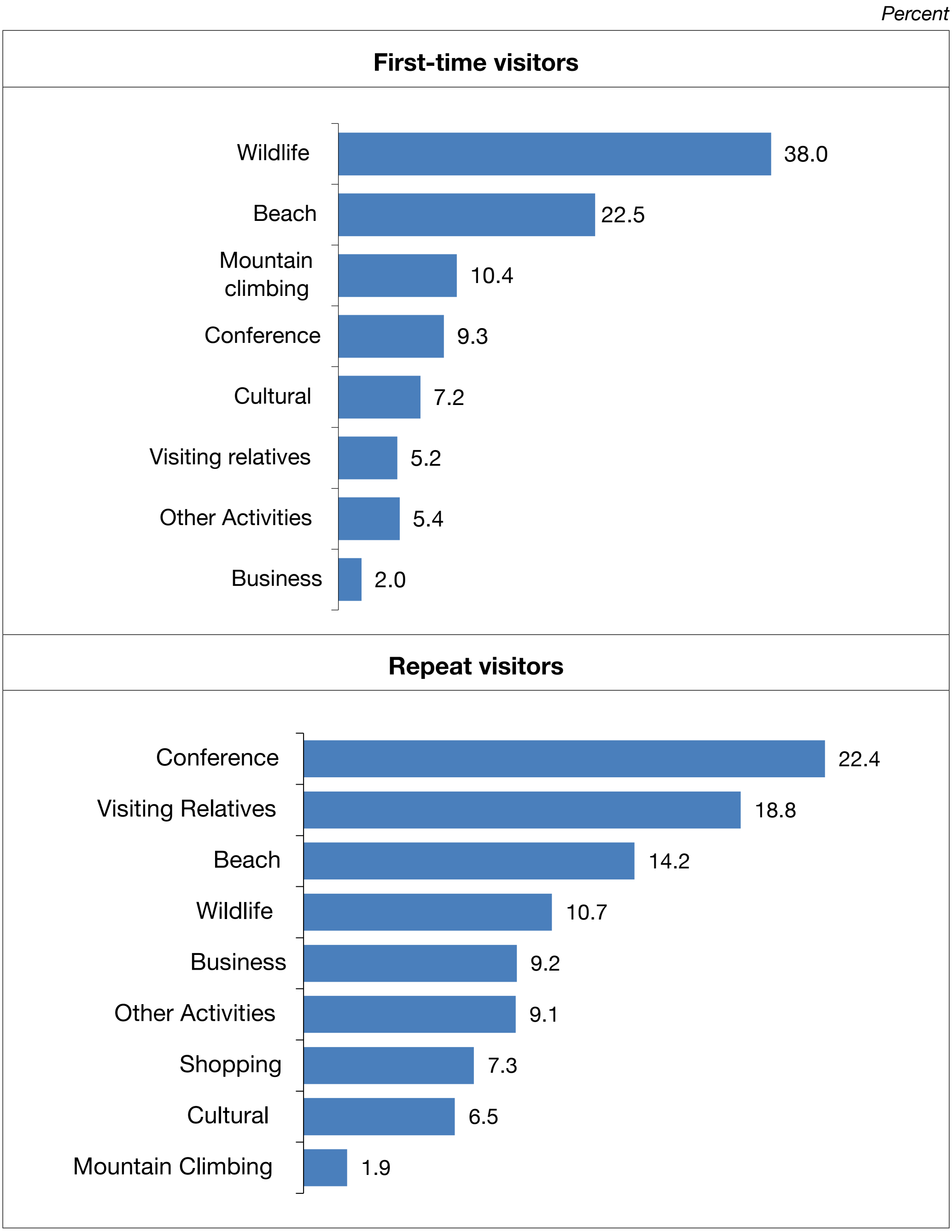
**Table 2.15: First-time and repeat visitors by purpose of visit, URT**

*Percent*

| Purpose of visit | First-time visitors | Repeat visitors |
|---|---|---|
| Leisure and holidays | 73.4 | 23.8 |
| Visiting friends and relatives | 9.2 | 34.3 |
| Business | 7.1 | 26.1 |
| Meetings and conferences | 4.9 | 12.3 |
| Volunteering | 3.4 | 1.0 |
| Scientific and academic | 1.5 | 1.6 |
| Religion | 0.3 | 0.8 |
| Other | 0.1 | 0.2 |
| **Total** | **100** | **100** |

**Chart 2.17** indicates that the majority of first-time visitors came for wildlife and beach tourism activities. Most of the repeat visitors came for conference tourism and visiting friends and relatives.

**Chart 2.17: First-time and repeat visitors by tourism activities, URT**

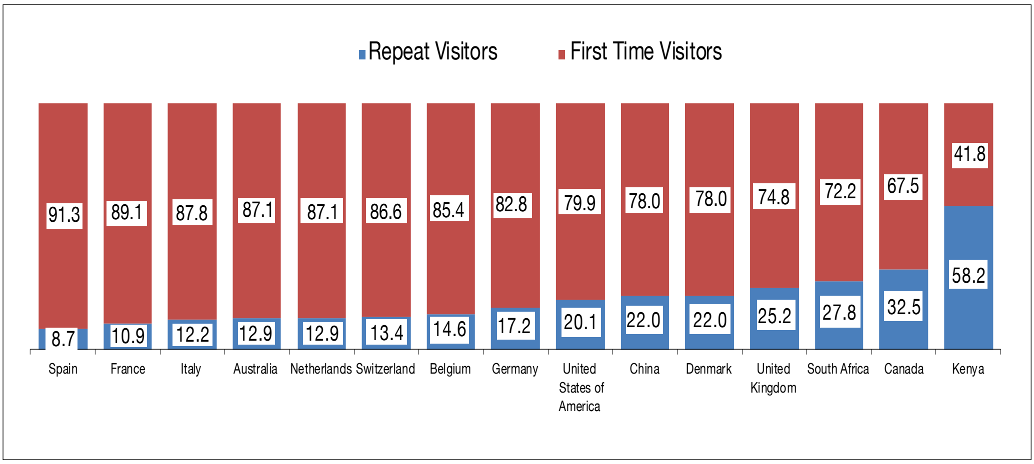



Note: Other activities include hunting, bird watching water sports and diving

The results indicate that with the exception of Kenya, the majority of visitors to Zanzibar from the top 15 source markets were first-time visitors (**Chart 2.18**). Most of the repeat visitors were from Kenya.

**Chart 2.18: First-time and repeat visitors by Top 15 source markets, Zanzibar**

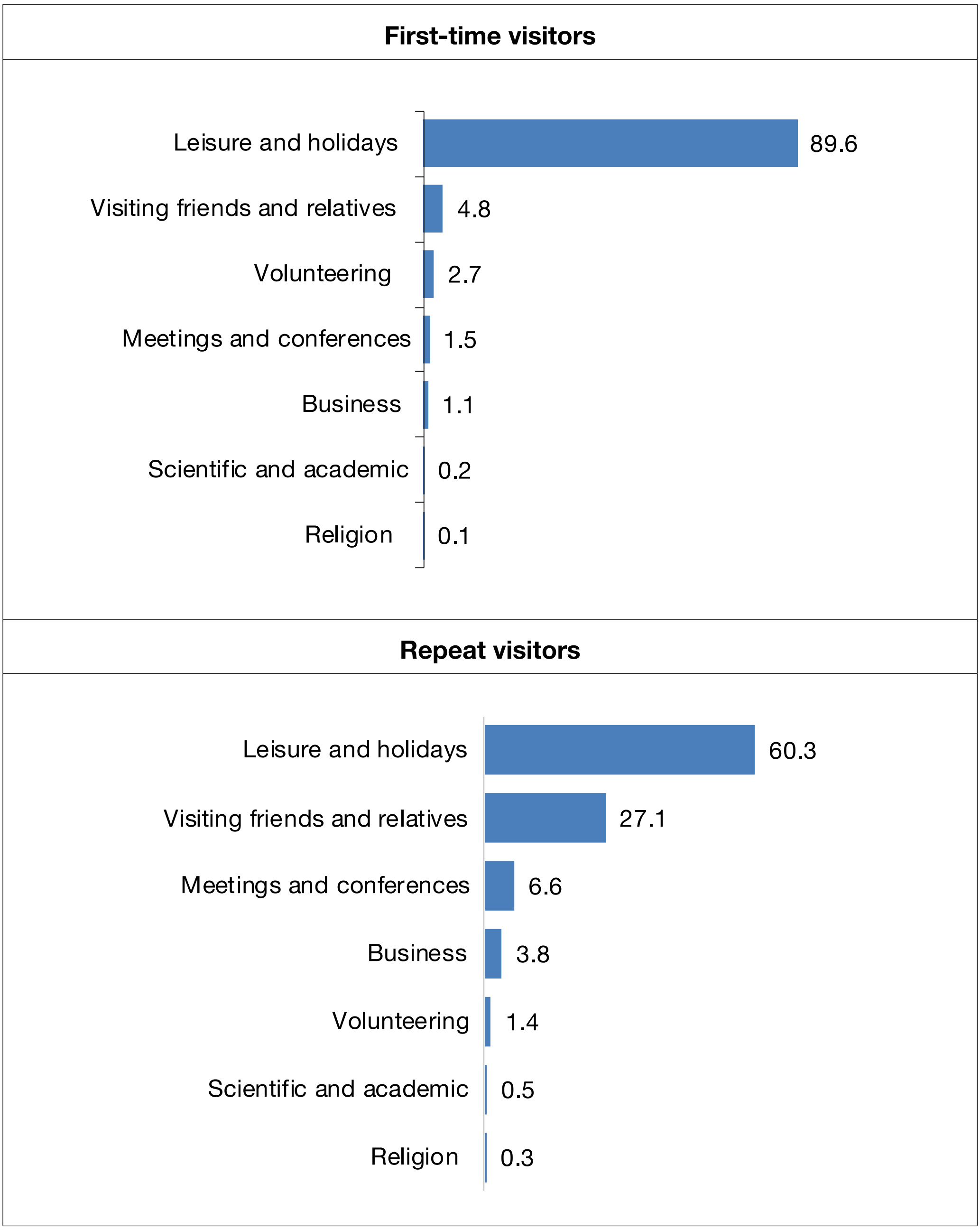
*Percent*



As indicated in **Chart 2.19,** leisure and holidays was the leading purpose that attracted the majority of both first-time and repeat visitors (89.6 percent and 60.3 percent respectively). Visitors who came for scientific and academic and religion purposes were the least for both first-time and repeat visitors.

**Chart 2.19: First-time and repeat visitors by purpose of visit, Zanzibar**

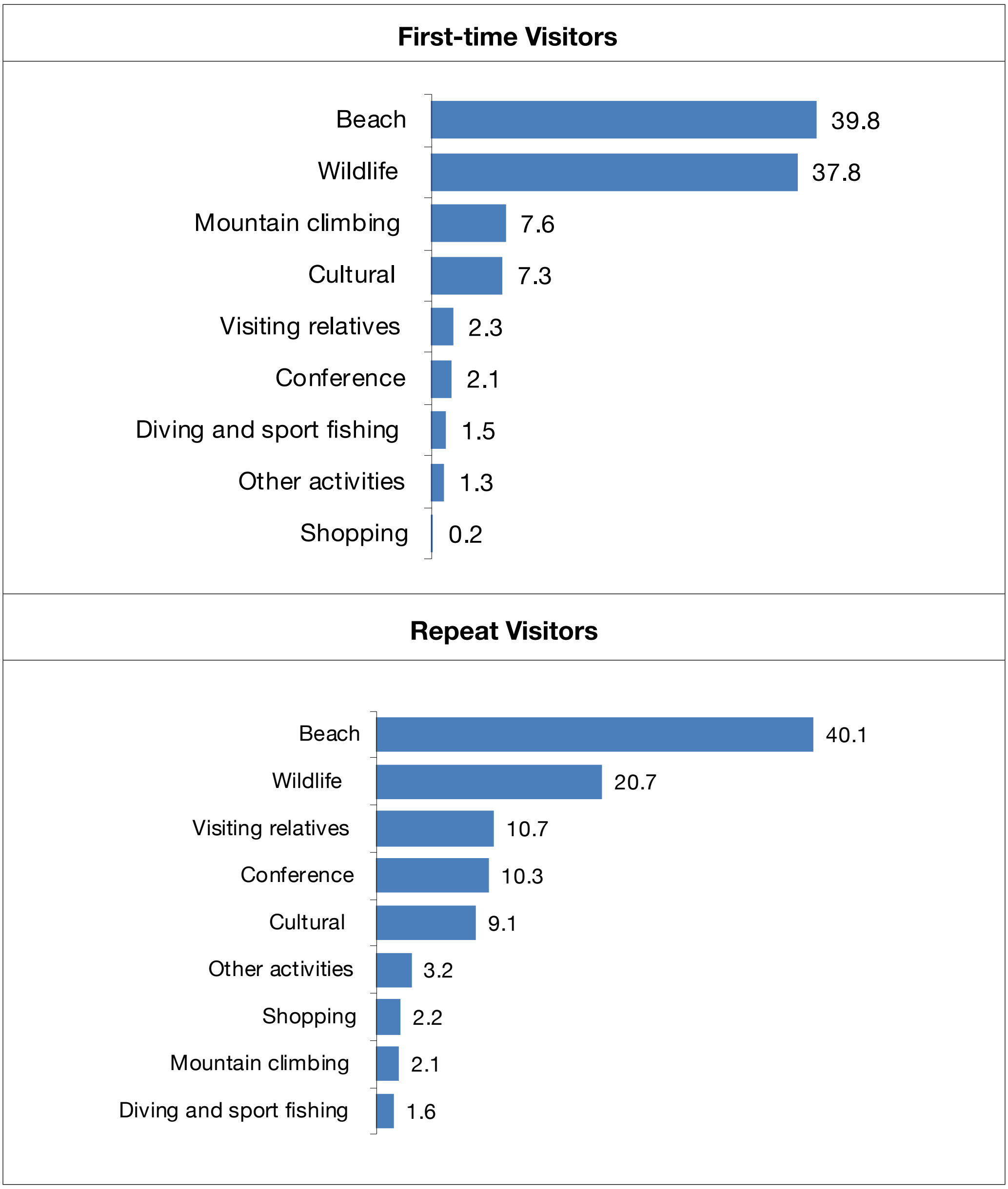
*Percent*



The findings further show that beach and wildlife were the leading activities that attracted the majority of both first-time and repeat visitors in Zanzibar (**Chart 2.20**). It is worth noting that, wildlife activities were also prominent in Zanzibar partly because visitors who exited from there also came for wildlife while in Tanzania Mainland.

**Chart 2.20: First-time and repeat visitors by tourism activity, Zanzibar**

*Percent*



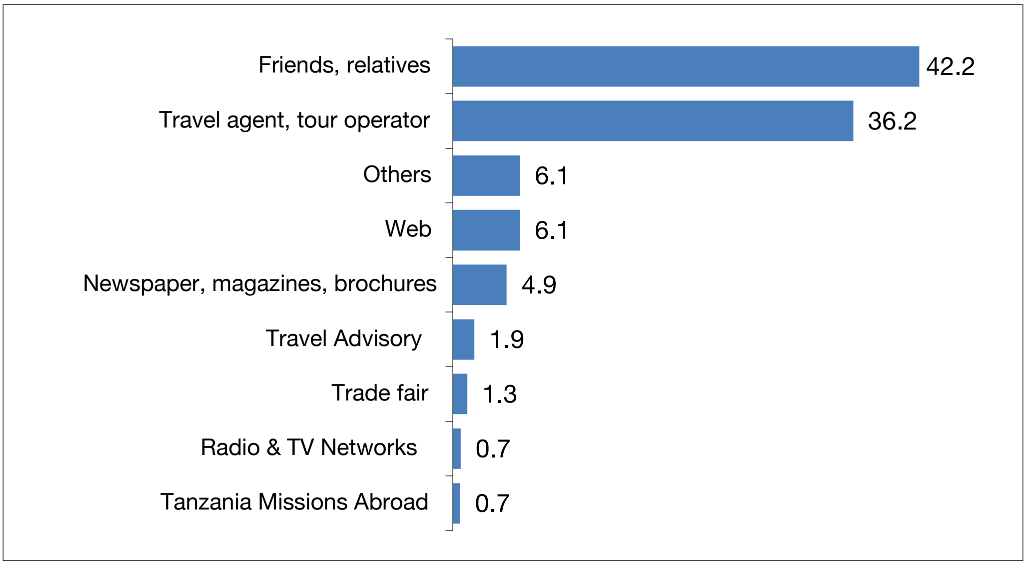

Note: Other activities include business, hunting, bird watching water sports and diving

## 2.7 Source of information

Survey findings show that about 42.2 percent of all the visitors got information about Tanzania from friends and relatives, followed by those who heard from travel agents and tour operators (**Chart 2.21**). Visitors who heard about Tanzania through travel agents and tour operators were mostly from the United States of America, United Kingdom, Kenya and South Africa, while those who received information through friends and relatives were from Kenya, the United Kingdom and France. Newspapers, magazines and brochures and web were equally important sources of information. Other sources of information were Tanzania's missions abroad, trade and tourism fairs, radio stations and television networks.

**Chart 2.21: Sources of information, URT**

*Percent*

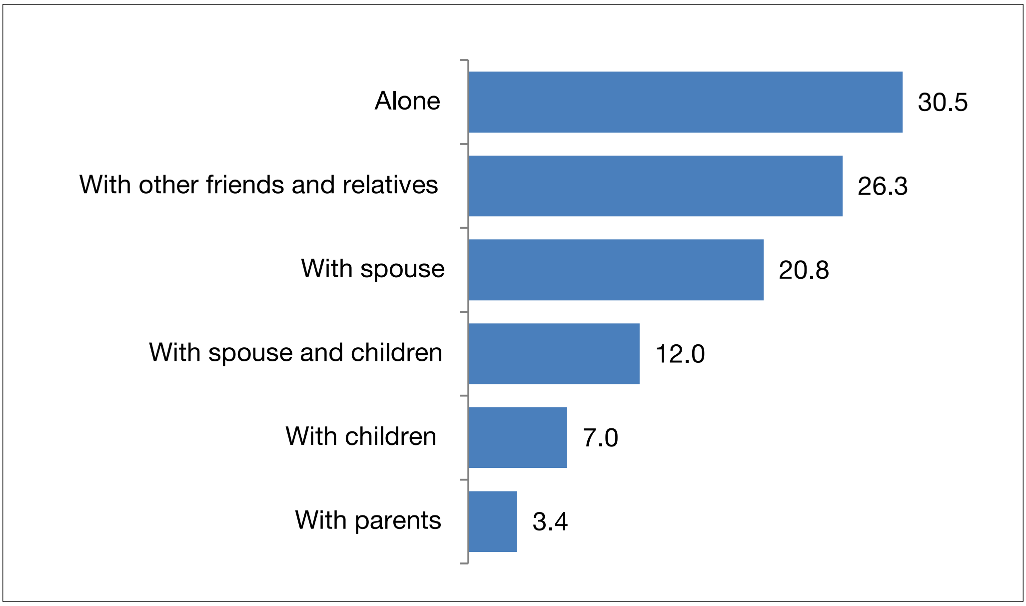



## 2.8 Travel party

The findings of the survey indicate that about 31 percent of the respondents travelled alone (**Chart 2.22**). Those who travelled with their friends and relatives accounted for 26 percent, followed by those who travelled with spouses. A small proportion of visitors who came with their parents was also recorded.

**Chart 2.22: Travel party, URT**

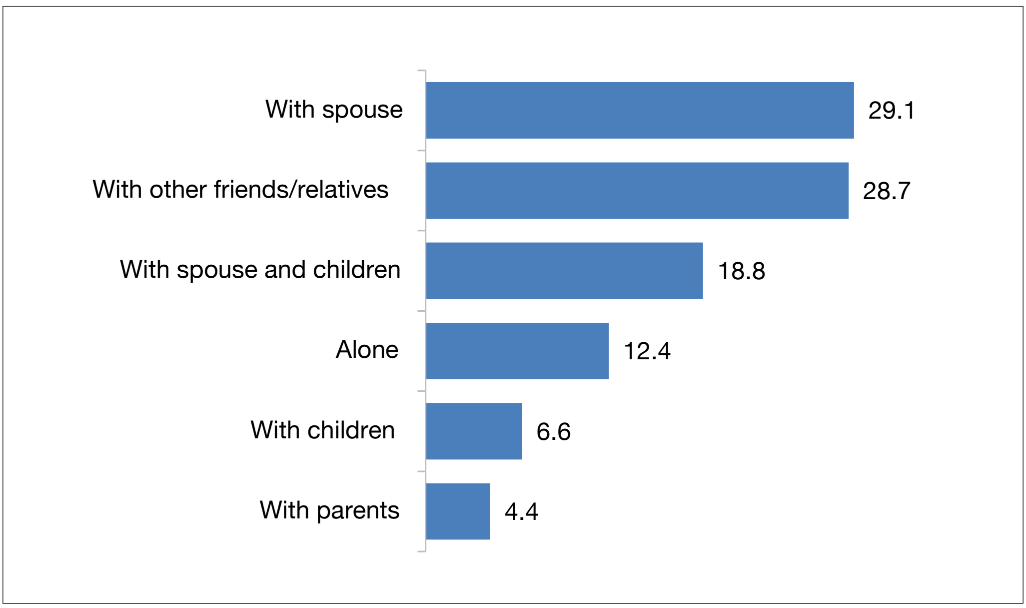
*Percent*




Unlike the case of URT, visitors to Zanzibar who travelled with spouses took the lead by accounting for 29.1 percent, followed by those who travelled with friends and relatives (**Chart 2.23**). Those who came with parents were the least.

**Chart 2.23: Travel party, Zanzibar**

*Percent*



## 2.9 Departure points

The survey covered eight departure points of which three were airports and five land border posts. The results show that 75.1 percent of the visitors departed through airports and 24.9 percent through land border posts (**Table 2.16**). The Julius Nyerere International Airport is the main departure point for tourists as it accounted for 40.6 percent of all the departing visitors, followed by the Abeid Aman Karume International Airport and Kilimanjaro International Airport. In terms of visitors departing through land, the leading border posts were Horohoro, Tunduma and Namanga.

**Table 2.16: The Number of visitors by departure points, URT**

| Departure points | Visitors | Percent |
|---|---|---|
| Julius Nyerere International Airport | 6,757 | 40.6 |
| Abeid Amani Karume International Airport | 3,382 | 20.3 |
| Kilimanjaro International Airport | 2,365 | 14.2 |
| Horohoro | 1,234 | 7.4 |
| Tunduma | 994 | 6.0 |
| Namanga | 947 | 5.7 |
| Mutukula | 611 | 3.7 |
| Manyovu | 349 | 2.1 |
| **Total** | **16,639** | **100** |

**Table 2.17** shows that Tunduma continues to be the leading departure point in handling the largest volume of visitors who came for business. This is because visitors from Zimbabwe and Zambia are using Dar es Salaam port for clearing imports and Kariakoo market for shopping. Visitors who came for leisure and holidays from long haul source market departed through AAKIA, KIA and JNIA due to availability and connectivity of many international airlines.

**Table 2.17: Proportion of visitors by departure points and purpose of visit, URT**

*Percent*

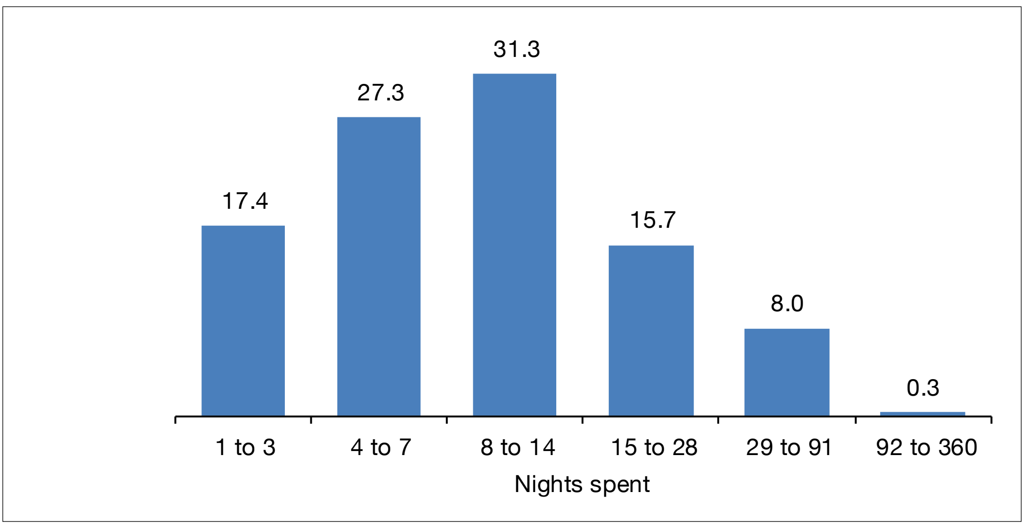
| Departure Points | Purpose of Visits: Leisure and holidays | Visiting friends and relatives | Business | Meetings and conferences | Scientific and academic | Volunteering | Other | Total |
|---|---|---|---|---|---|---|---|---|
| JNIA | 52.0 | 22.2 | 9.5 | 10.6 | 1.3 | 3.8 | 0.6 | 100.0 |
| AAKIA | 94.3 | 2.8 | 0.4 | 1.1 | 0.2 | 1.2 | 0.0 | 100.0 |
| KIA | 83.7 | 5.0 | 2.6 | 4.1 | 1.9 | 2.3 | 0.4 | 100.0 |
| HOR | 17.4 | 60.4 | 7.9 | 0.5 | 11.3 | 0.0 | 2.6 | 100.0 |
| TUN | 7.6 | 10.8 | 73.5 | 2.4 | 5.0 | 0.1 | 0.5 | 100.0 |
| NAM | 87.9 | 6.2 | 0.8 | 1.4 | 0.6 | 2.5 | 0.5 | 100.0 |
| MTU | 13.7 | 45.0 | 24.1 | 5.1 | 11.0 | 0.2 | 1.0 | 100.0 |
| MANY | 21.2 | 42.1 | 35.5 | 0.0 | 0.0 | 0.0 | 1.1 | 100.0 |

## 2.10 Nights spent and average length of stay

The length of stay for the visitors is derived from the number of nights spent in the country. Nights spent by visitors varied depending on purpose of visit and country of origin. The survey results show that 18 percent of the visitors who came to the United Republic of Tanzania spent 1 to 3 nights, 27 percent spent 4 to 7 nights, while about one third of total visitors spent 8 to 14 nights (**Chart 2.24**). These results are almost similar to the findings of the previous surveys. Generally, more than three-quarters of the visitors spent between 1 to 14 nights, while a few of them visitors spent between 28 to 91 nights.

**Chart 2.24: Distribution of visitors by nights spent, URT, 2016**

*Percent*



The distribution of visitors by nights spent and purpose of visit shows that the majority of the holidaymakers spent between 8 to 14 nights, while most of the business visitors spent 1 to 3 nights. Meanwhile, a large proportion of visitors who came for meetings and conference spent 4 to 7 nights (**Table 2.18**).

### Table 2.18: Distribution of visitors by the nights spent and purpose of visit, URT

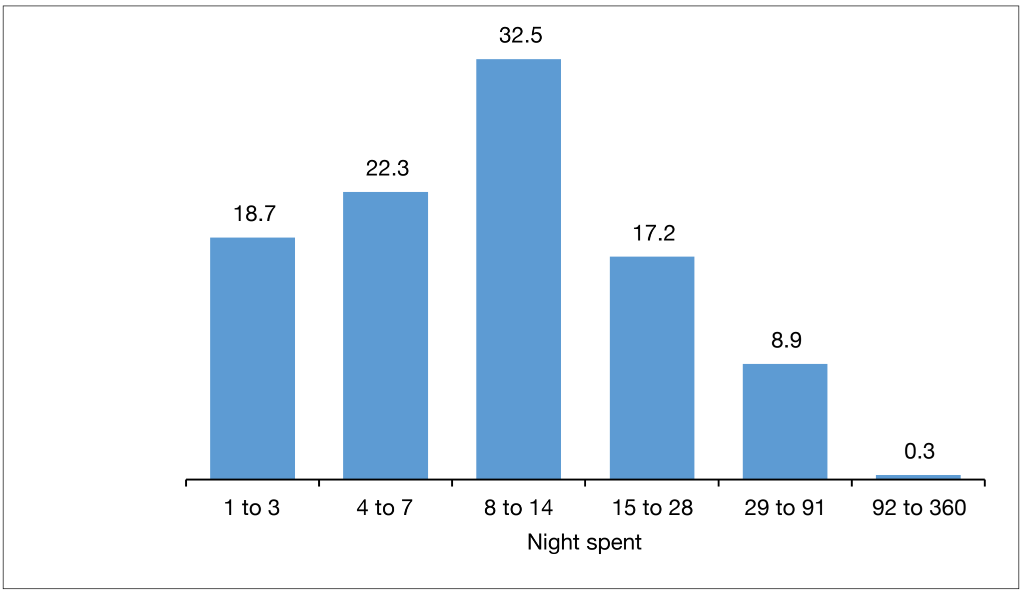
*Percent*

| Nights spent | Purpose of visit | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Leisure and holidays | Visiting friends and relatives | Business | Meetings and conferences | Scientific and academic | Volunteering | Religion | Other |
| 1 to 3 | 7.7 | 22.0 | 51.6 | 36.3 | 36.6 | 0.8 | 20.9 | 57.9 |
| 4 to 7 | 27.6 | 22.6 | 27.3 | 43.2 | 38.1 | 4.8 | 34.9 | 36.8 |
| 8 to 14 | 42.7 | 18.7 | 9.3 | 13.1 | 9.9 | 11.3 | 15.1 | 5.3 |
| 15 to 28 | 18.1 | 16.0 | 4.7 | 3.8 | 6.7 | 40.2 | 25.6 | 0.0 |
| 29 to 91 | 3.7 | 20.3 | 6.6 | 3.6 | 8.2 | 40.8 | 3.5 | 0.0 |
| 92 to 360 | 0.2 | 0.4 | 0.4 | 0.0 | 0.5 | 2.1 | 0.0 | 0.0 |
| **Grand total** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** |

The pattern of the distribution of visitors by nights spent in Tanzania Mainland is similar to that of URT (**Chart 2.25**).

### Chart 2.25: Distribution of visitors by the nights spent, Tanzania Mainland, 2016

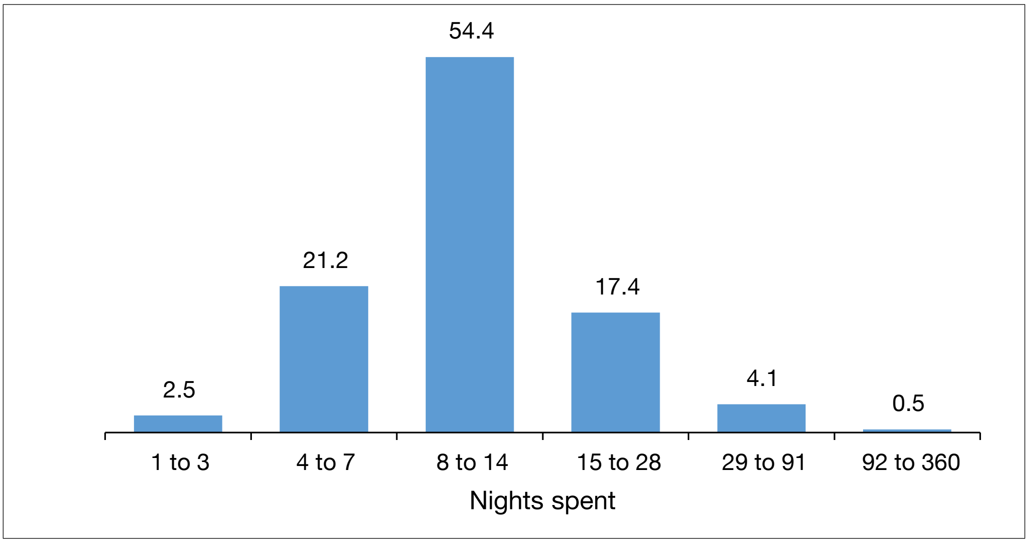
*Percent*



In the case of Zanzibar, more than half of the visitors spent 8 to 14 nights, while those who spent more than a month accounted for 5 percent (**Chart 2.26**).

**Chart 2.26: Distribution of visitors by the nights spent, Zanzibar**

*Percent*




The survey results show that an overall average length of stay of persons who visited Tanzania was 9 nights slightly lower than 10 nights recorded during the past five years. This is partly due to the increase in the number of the visitors from the neighboring countries whose length of stay is shorter. For instance, visitors from Burundi and Kenya spent an average of 4 nights. Visitors from Germany and Spain stayed the longest with an average of 14 and 13 nights, respectively (**Table 2.19**). These results are consistent with the previous findings, whereby visitors from long haul source markets stayed the longest.

**Table 2.19: Length of stay by purpose of visit and top 15 source markets, URT**

*Percent*

| Country of residence | Purpose of visit: Business | Leisure and holidays | Visiting friends and relatives | Other | Average |
|---|---|---|---|---|---|
| United Kingdom | 5 | 12 | 14 | 15 | 11 |
| Kenya | 5 | 5 | 5 | 3 | 4 |
| United States of America | 8 | 11 | 12 | 13 | 11 |
| Germany | 11 | 14 | 15 | 16 | 14 |
| Italy | 6 | 11 | 12 | 18 | 12 |
| South Africa | 5 | 6 | 7 | 5 | 6 |
| Zambia | 4 | 8 | 6 | 5 | 6 |
| Uganda | 6 | 8 | 4 | 4 | 6 |
| Spain | 4 | 12 | 16 | 21 | 13 |
| Zimbabwe | 3 | 5 | 6 | 28 | 8 |
| France | 8 | 13 | 10 | 6 | 10 |
| Australia | 8 | 11 | 13 | 3 | 10 |
| Canada | 10 | 11 | 13 | 11 | 11 |
| Burundi | 5 | 4 | 3 | 2 | 4 |
| China | 8 | 7 | 9 | 13 | 9 |
| **Average** | **6** | **9** | **10** | **11** | **9** |

The overall average length of stay for Tanzania Mainland was 8 nights (**Table 2.20**). Visitors from Germany stayed the longest with an average of 13 nights, followed by those from Australia, Canada, Spain, Italy, the United Kingdom and the United States of America.

**Table 2.20: Length of stay by purpose of visit and top 15 source markets, Tanzania Mainland**

*Percent*

| Country of residence | Purpose of visit: Business | Leisure and holidays | Visiting friends and relatives | Other | Average |
|---|---|---|---|---|---|
| Australia | 8 | 9 | 13 | 15 | 12 |
| Burundi | 5 | 4 | 3 | 2 | 4 |
| Canada | 10 | 10 | 13 | 10 | 11 |
| China | 8 | 6 | 9 | 13 | 9 |
| France | 8 | 9 | 11 | 4 | 9 |
| Germany | 11 | 10 | 14 | 16 | 13 |
| Italy | 6 | 9 | 11 | 18 | 11 |
| Kenya | 4 | 5 | 5 | 3 | 4 |
| South Africa | 5 | 5 | 5 | 5 | 5 |
| Spain | 3 | 9 | 11 | 21 | 11 |
| Uganda | 6 | 8 | 4 | 4 | 6 |
| United Kingdom | 5 | 9 | 12 | 16 | 11 |
| United States of America | 8 | 10 | 12 | 13 | 11 |
| Zambia | 4 | 5 | 6 | 5 | 5 |
| Zimbabwe | 3 | 3 | 6 | 28 | 8 |
| **Average** | **6** | **7** | **9** | **11** | **8** |

In the case of Zanzibar, the overall average length of stay remained at 6 nights the same as observed in the previous five surveys. Visitors from Denmark and Italy stayed the longest with an average of 8 nights each (**Table 2.21**).

**Table 2.21: Average length of stay by purpose of visit and top 15 source markets, Zanzibar**

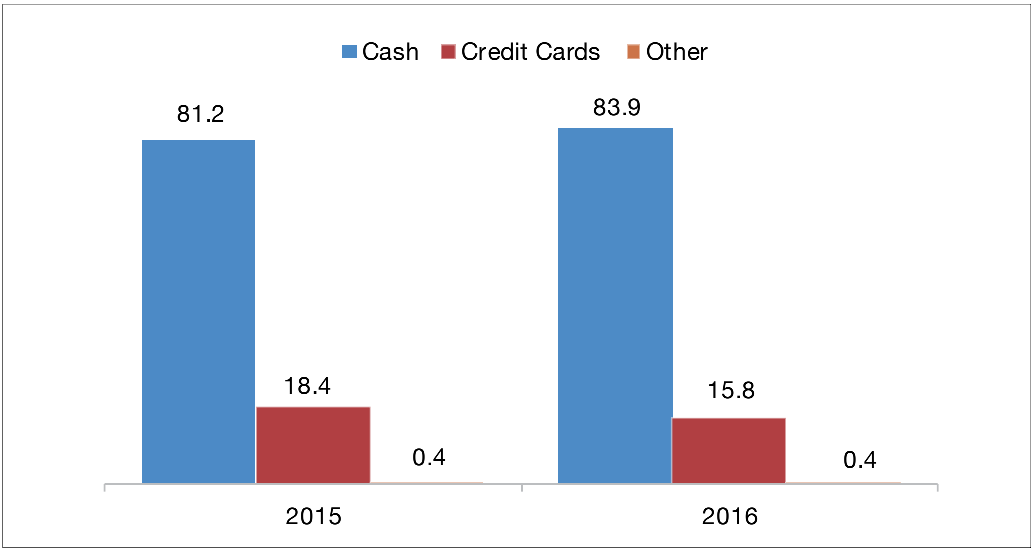
| | Purpose of visit | | | | |
|---|---|---|---|---|---|
| **Country of residence** | **Business** | **Leisure and holidays** | **Visiting friends and relatives** | **Other** | **Average** |
| United Kingdom | 3 | 6 | 10 | 5 | 6 |
| Italy | 8 | 8 | 9 | 6 | 8 |
| Germany | 8 | 7 | 5 | 6 | 7 |
| United States of America | 2 | 4 | 3 | 5 | 3 |
| South Africa | 4 | 6 | 6 | - | 5 |
| Spain | 3 | 6 | 7 | 8 | 6 |
| France | 3 | 7 | 4 | 3 | 5 |
| Australia | 7 | 4 | 3 | 5 | 5 |
| Canada | 6 | 5 | 6 | 3 | 5 |
| Switzerland | 1 | 7 | 6 | 5 | 5 |
| Kenya | 4 | 5 | 5 | - | 5 |
| Netherlands | 3 | 7 | 11 | 5 | 6 |
| Belgium | 5 | 7 | 5 | 5 | 6 |
| China | 16 | 4 | 3 | 3 | 6 |
| Denmark | 1 | 8 | 4 | 14 | 8 |
| **Average** | **5** | **6** | **6** | **6** | **6** |

## 2.11 Mode of payment

During the 2016 survey, about 84 percent of the interviewed visitors to the United Republic of Tanzania settled their bills in cash, followed by those who used credit cards. When comparing with 2015 survey results, there is an increase in the use of cash relative to credit cards (**Chart 2.27**). Meanwhile, the number of visitors who used other modes of payment such as travelers' cheques bank transfers and bankers' cheques remained small same as in the 2015 survey results. Similarly, about 77 percent of interviewed visitors in Zanzibar paid in cash, followed by 21 percent who used credit cards and the rest settled their bills by other modes of payment.

## Chart 2.27: Modes of payment, 2016

*Percent*

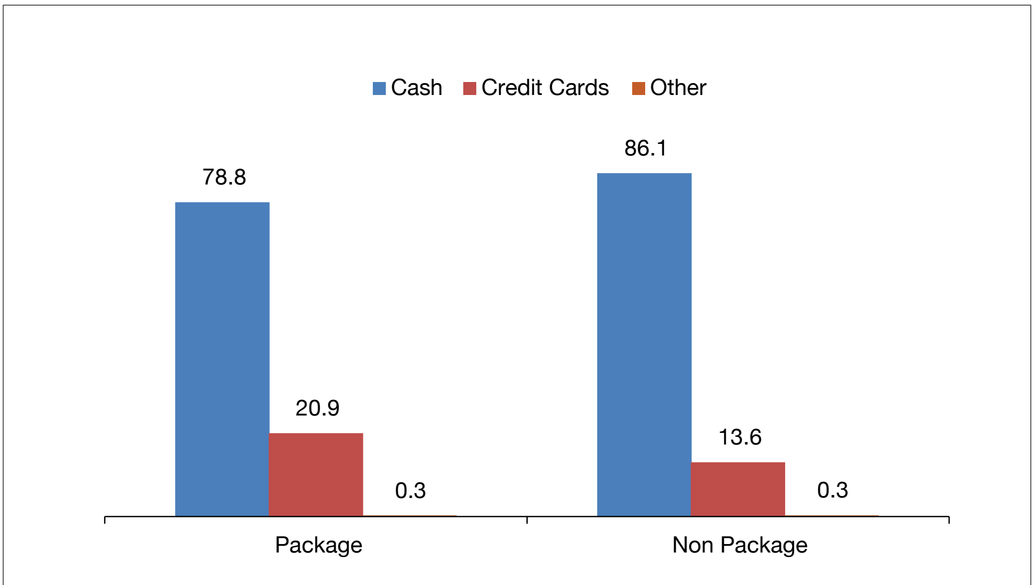



Note: Other include modes of payment such as travelers' cheques bank transfers and; bankers' cheques

When looking at the modes of payment by tour arrangement the majority of the visitors who came under the package tour settled their bills using credit cards compared to non-package tourists. Notwithstanding, cash was more prominent in both tour arrangements (**Chart 2.28**).

## Chart 2.28: Mode of payment by tour Arrangement

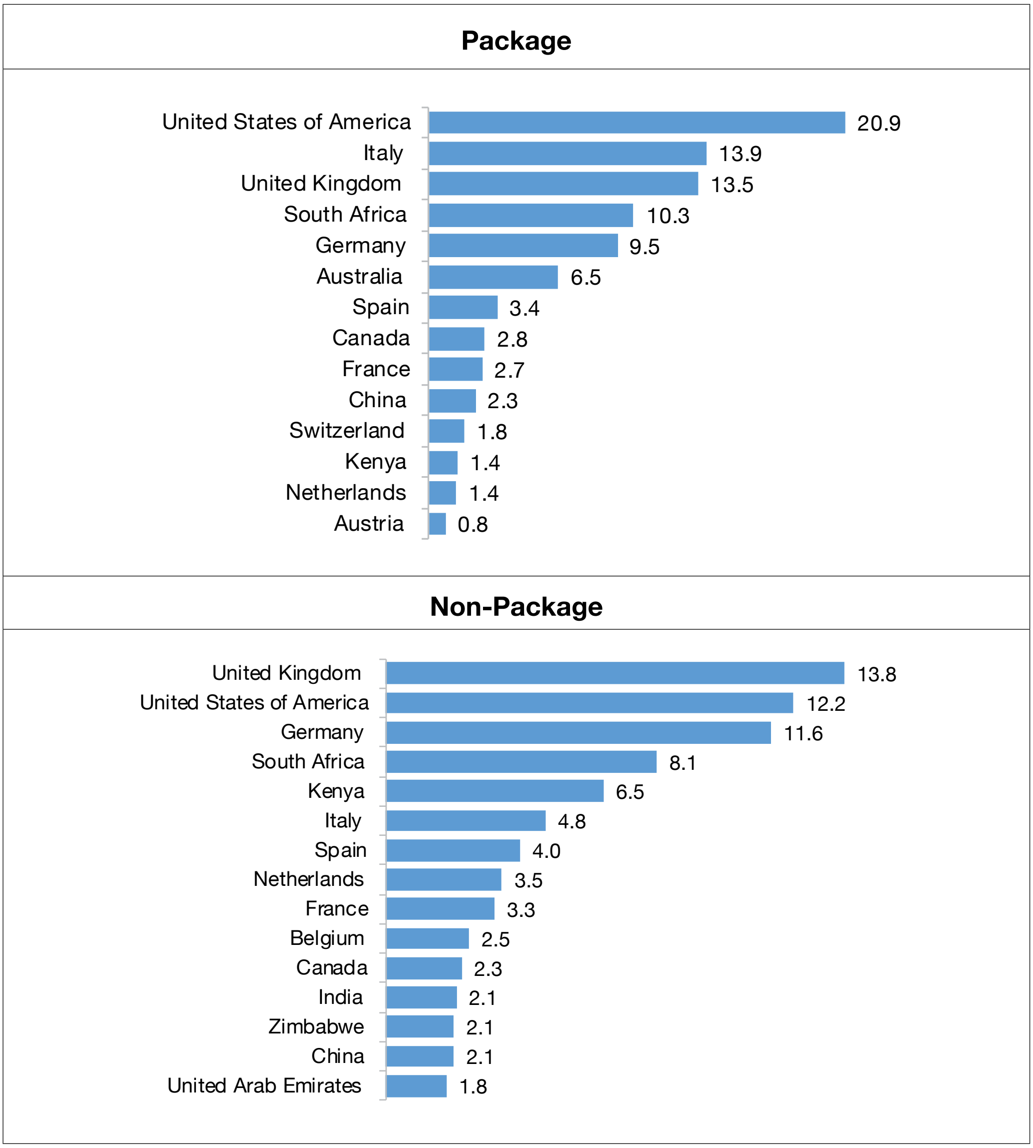
*Percent*



The findings further reveal that most of those visitors who used credit cards under the package tour arrangement were from the United States of America, Italy, the United Kingdom and South Africa. Likewise, under the non-package tour, the same visitors mainly used credit cards except Italy. The findings also show that most of the visitors from the neighboring countries i.e. Kenya, Uganda, Zambia and Burundi under the non-package tour settled their bills mostly in cash  (**Chart 2.29** and **Chart 2.30**).

**Chart 2.29: Credit cards payment by tour arrangement for top 15 source markets**

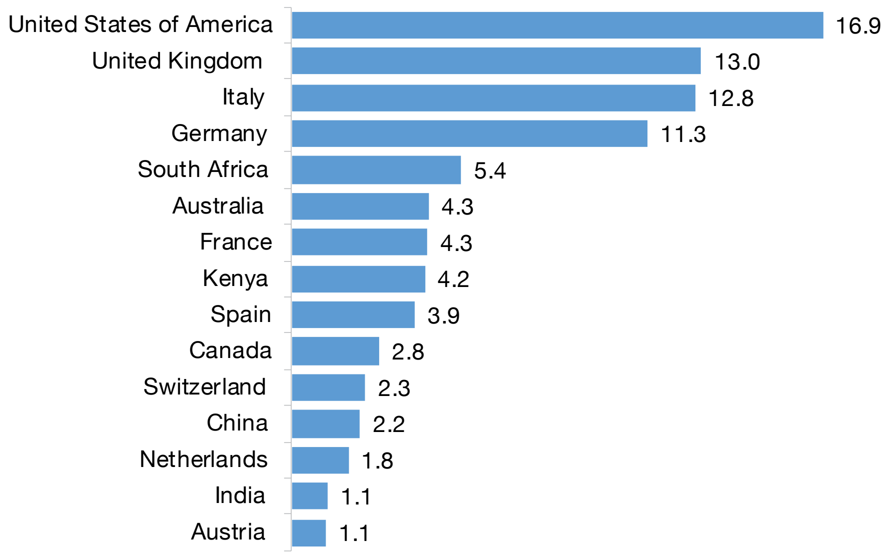
*Percent*



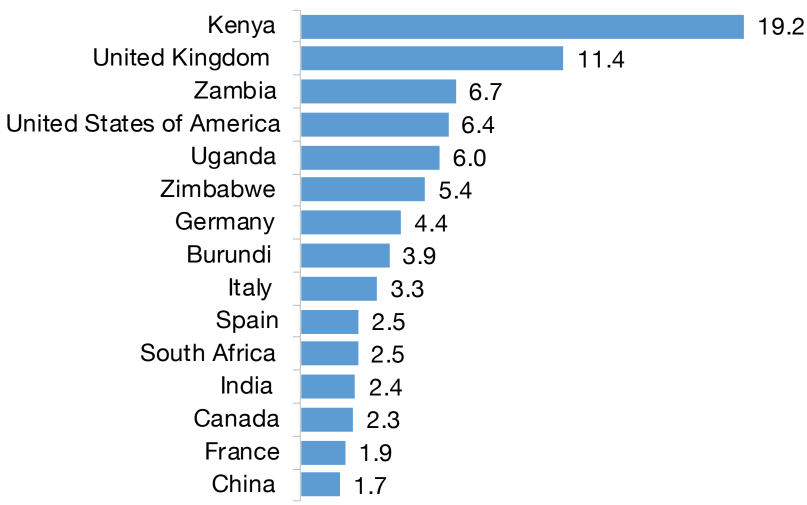
## Chart 2.30: Cash payment by tour arrangement for top 15 source markets

*Percent*

**Package**




**Non-Package**

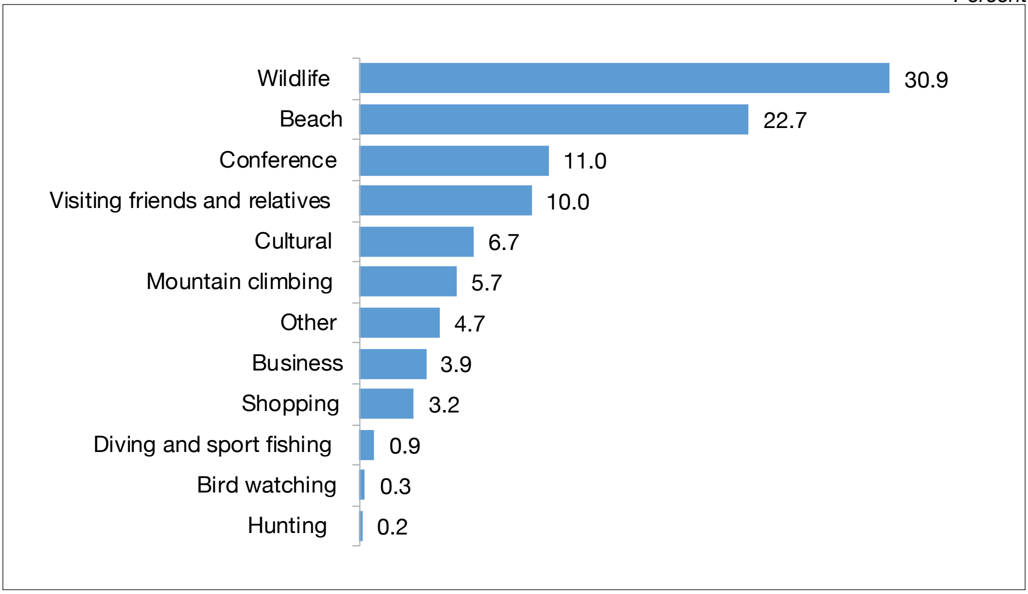


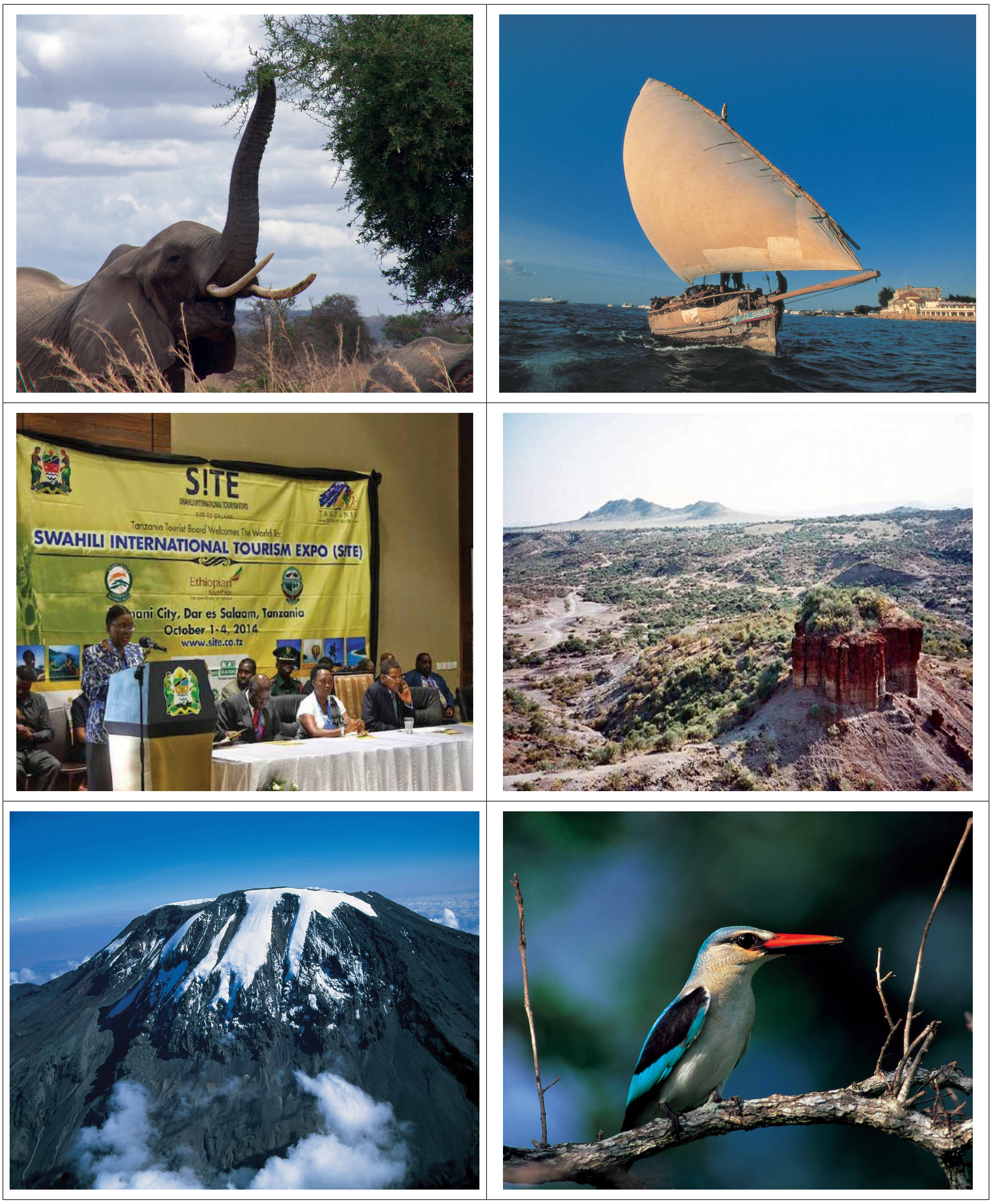
## 2.12 Tourism activities

The survey findings show that wildlife is the main tourism activity in Tanzania followed by beach and conference. The dominance of wildlife activities over beach is largely attributed to lack of specific plans and programs for developing the beach areas for sporting and recreation activities. Other important activities were visiting friends and relatives; cultural and mountain climbing (**Chart 2.31**).

**Chart 2.31: Tourism activities in URT, 2016**

*Percent*



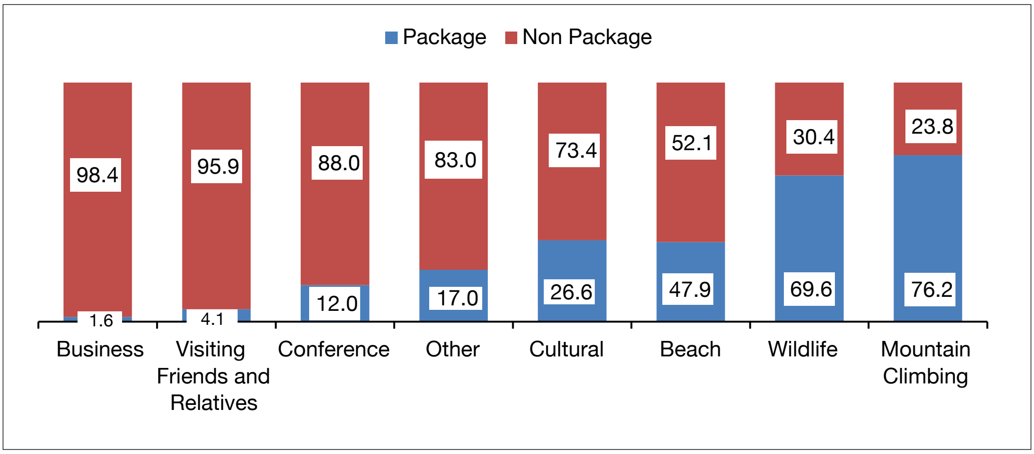



*Tourism Activities in Tanzania*

When looking at tourist activities by travel arrangement, the findings show that about 70 percent of the visitors who came for wildlife and mountain climbing preferred package tour. Conversely, the majority of visitors who came for business, visiting friends and relatives; cultural and conference activities came under the non-package tour arrangement (**Chart 2.32**).

**Chart 2.32: Tourism activity and travel arrangement, URT**

*Percent*




The top 15 source markets depict that the majority of visitors from Australia, France, Spain and the United States of America came for wildlife tourism. In addition, the majority of the visitors from Italy and South Africa came for beach tourism. However, the majority of the visitors from the neighboring countries such as Kenya, Zambia and Burundi came for shopping, vehicle clearance, and visiting friends and relatives (**Table 2.22**).

## Table 2.22: Top 15 Source markets and tourism activities, URT

*Percent*

| Country of residence | Tourism Activities | | | | | | | | | | | Grand total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Wildlife | Beach | Mountain climbing | Business | Visiting friends and relatives | Cultural | Conference | Diving and sport fishing | Bird watching | Shopping | Hunting | Other | |
| United Kingdom | 34.4 | 22.8 | 13.0 | 0.3 | 11.2 | 5.3 | 7.5 | 1.4 | 0.6 | 0.7 | 0.0 | 2.9 | 100 |
| Kenya | 3.7 | 18.6 | 0.4 | 2.7 | 30.7 | 4.0 | 18.7 | 0.3 | 0.5 | 7.6 | 0.0 | 12.8 | 100 |
| United States of America | 54.5 | 13.0 | 9.4 | 0.1 | 5.5 | 7.8 | 6.7 | 0.3 | 0.4 | 0.3 | 0.6 | 1.5 | 100 |
| Germany | 46.2 | 22.4 | 8.2 | 0.0 | 5.3 | 10.5 | 4.8 | 0.8 | 0.1 | 0.4 | 0.0 | 1.4 | 100 |
| Italy | 28.0 | 56.9 | 1.0 | 0.0 | 3.0 | 6.0 | 3.4 | 0.9 | 0.2 | 0.0 | 0.2 | 0.5 | 100 |
| South Africa | 7.8 | 52.3 | 1.2 | 0.4 | 2.2 | 4.9 | 24.0 | 2.5 | 0.0 | 1.1 | 0.0 | 3.7 | 100 |
| Zambia | 0.8 | 12.3 | 0.5 | 34.4 | 5.1 | 3.7 | 15.8 | 0.8 | 0.5 | 13.2 | 0.0 | 12.9 | 100 |
| Uganda | 1.9 | 6.3 | 0.0 | 9.3 | 25.2 | 4.2 | 28.6 | 0.6 | 0.0 | 4.4 | 0.0 | 19.7 | 100 |
| Spain | 55.8 | 18.8 | 5.9 | 0.4 | 5.1 | 6.5 | 2.3 | 3.6 | 0.4 | 0.0 | 0.0 | 1.3 | 100 |
| Zimbabwe | 1.2 | 15.0 | 0.0 | 55.4 | 3.4 | 1.2 | 3.8 | 0.0 | 0.2 | 15.6 | 0.0 | 4.2 | 100 |
| France | 60.3 | 20.2 | 3.1 | 0.0 | 3.1 | 5.4 | 4.8 | 1.2 | 0.4 | 0.0 | 0.8 | 0.6 | 100 |
| Australia | 66.7 | 7.5 | 10.1 | 0.2 | 1.9 | 8.2 | 4.0 | 0.0 | 0.0 | 0.0 | 0.0 | 1.4 | 100 |
| Canada | 42.7 | 17.5 | 8.9 | 0.0 | 13.2 | 8.4 | 8.4 | 0.0 | 0.0 | 0.2 | 0.0 | 0.7 | 100 |
| Burundi | 1.2 | 20.5 | 0.0 | 2.1 | 11.3 | 27.2 | 4.9 | 0.0 | 0.0 | 21.4 | 0.0 | 11.3 | 100 |
| China | 46.0 | 11.7 | 2.5 | 0.0 | 2.8 | 9.9 | 17.9 | 0.6 | 0.0 | 1.2 | 1.9 | 5.6 | 100 |

The survey results reveal that visitors from the United States of America, the United Kingdom and Germany dominated wildlife safaris. Furthermore, visitors who preferred beach tourism mainly came from Italy, the United Kingdom, South Africa and Kenya, while those who came for conference were from Kenya, South Africa, the United Kingdom and Uganda. Visitors climbing the famous Mount Kilimanjaro were mostly from the United Kingdom, the United States of America and Germany (**Table 2.23**).

## Table 2.23: Tourism activities by top 15 source markets, URT

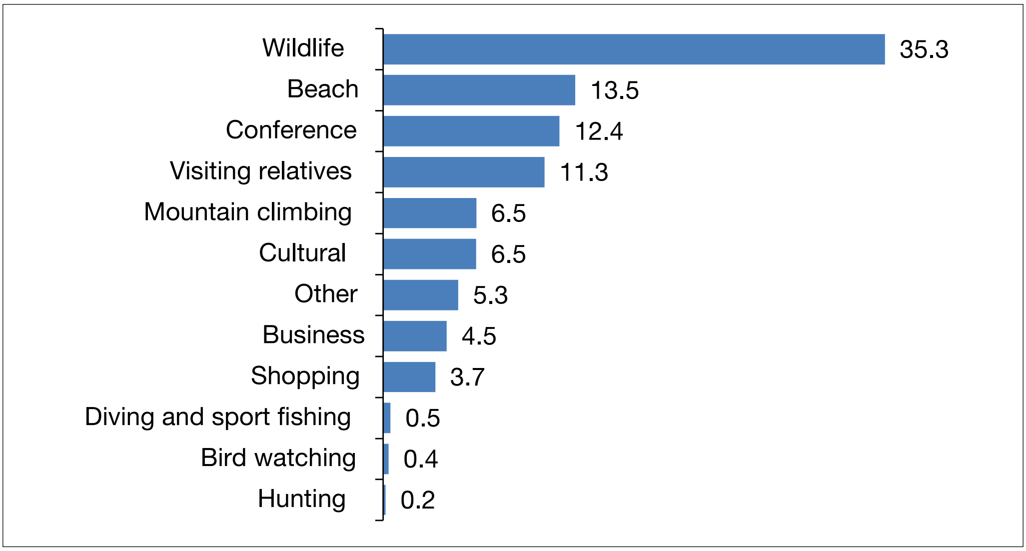
*Percent*

| Country of residence | Tourism Activities | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Wildlife | Beach | Mountain climbing | Business | Visiting friends and relatives | Cultural | Conference | Diving and sport fishing | Bird watching | Shopping | Hunting | Other |
| United Kingdom | 17.4 | 15.3 | 16.5 | 11.3 | 12.2 | 37.1 | 1.0 | 3.2 | 24.6 | 30.8 | 4.2 | 9.0 |
| Kenya | 1.8 | 11.8 | 43.0 | 26.8 | 8.8 | 1.0 | 8.5 | 33.7 | 5.3 | 23.1 | 0.0 | 37.2 |
| United States of America | 25.9 | 8.1 | 7.6 | 9.5 | 17.1 | 25.2 | 0.3 | 1.1 | 4.4 | 17.9 | 45.8 | 4.2 |
| Germany | 14.6 | 9.4 | 4.9 | 4.5 | 15.1 | 14.6 | 0.0 | 1.1 | 8.8 | 2.6 | 0.0 | 2.7 |
| Italy | 8.6 | 23.1 | 2.7 | 3.1 | 8.5 | 1.7 | 0.0 | 0.0 | 9.6 | 5.1 | 8.3 | 0.9 |
| South Africa | 1.5 | 13.0 | 1.2 | 13.4 | 4.2 | 1.3 | 0.5 | 1.8 | 16.7 | 0.0 | 0.0 | 4.2 |
| Zambia | 0.1 | 2.5 | 2.3 | 7.3 | 2.6 | 0.4 | 35.1 | 18.9 | 4.4 | 7.7 | 0.0 | 12.1 |
| Uganda | 0.2 | 1.1 | 9.6 | 11.1 | 2.5 | 0.0 | 8.0 | 5.2 | 2.6 | 0.0 | 0.0 | 15.5 |
| Spain | 7.3 | 3.2 | 1.9 | 0.9 | 3.8 | 4.3 | 0.3 | 0.0 | 16.7 | 5.1 | 0.0 | 1.0 |
| Zimbabwe | 0.1 | 2.4 | 1.2 | 1.4 | 0.7 | 0.0 | 45.0 | 17.8 | 0.0 | 2.6 | 0.0 | 3.1 |
| France | 7.2 | 3.2 | 1.1 | 1.7 | 2.9 | 2.1 | 0.0 | 0.0 | 5.3 | 5.1 | 16.7 | 0.4 |
| Australia | 7.0 | 1.0 | 0.6 | 1.2 | 4.0 | 6.0 | 0.2 | 0.0 | 0.0 | 0.0 | 0.0 | 0.9 |
| Canada | 4.4 | 2.4 | 4.0 | 2.6 | 4.0 | 5.2 | 0.0 | 0.2 | 0.0 | 0.0 | 0.0 | 0.4 |
| Burundi | 0.1 | 2.2 | 2.7 | 1.2 | 10.1 | 0.0 | 1.1 | 15.9 | 0.0 | 0.0 | 0.0 | 5.5 |
| China | 3.7 | 1.2 | 0.6 | 4.3 | 3.6 | 1.1 | 0.0 | 0.9 | 1.8 | 0.0 | 25.0 | 2.7 |
| Grand Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |

Same as URT, wildlife is the main tourism activity in Tanzania Mainland followed by beach and conference tourism. Other important activities were visiting friends and relatives; enjoying mountain climbing as well as history and culture (**Chart 2.33**).

**Chart 2.33: Tourism activities in Tanzania Mainland, 2016**

*Percent*




Likewise, in Tanzania Mainland, visitors from the United States of America, United Kingdom and Germany dominated wildlife activities. Furthermore, visitors who preferred beach tourism mainly came from the United Kingdom, the United States of America, Kenya and Germany, while those who came for conference were from Kenya, South Africa, the United Kingdom and Uganda. Visitors climbing the famous Mount Kilimanjaro were mostly from the United Kingdom, the United States of America and Germany (**Table 2.24**).

### Table 2.24: Tourism activities by top 15 source markets, Tanzania Mainland

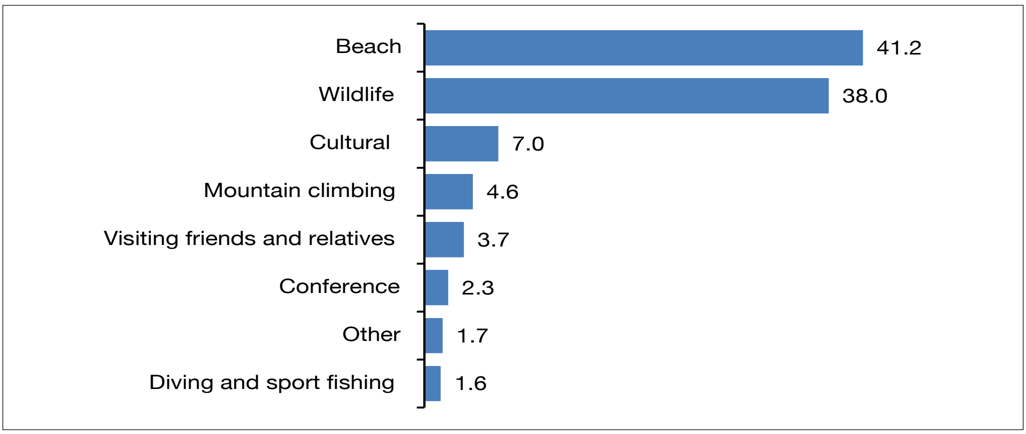
*Percent*

| Country of residence | Wildlife | Beach | Conference | Visiting relatives | Mountain climbing | Cultural | Other | Business | Shopping | Diving and sport fishing | Bird watching | Hunting | Grand total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Tourism activities | | | | | | | | | | | | |
| United Kingdom | 17.4 | 22.4 | 11.5 | 16.5 | 37.1 | 13.5 | 8.6 | 1.0 | 3.2 | 28.1 | 27.0 | 4.5 | 16.4 |
| Kenya | 1.8 | 18.2 | 26.7 | 43.3 | 1.0 | 10.3 | 37.7 | 8.5 | 33.9 | 10.5 | 24.3 | 0.0 | 16.0 |
| United States of America | 26.2 | 10.5 | 9.8 | 7.5 | 25.2 | 17.6 | 4.2 | 0.3 | 1.1 | 1.8 | 18.9 | 50.0 | 15.7 |
| Germany | 14.7 | 10.2 | 4.1 | 4.7 | 14.6 | 16.8 | 2.7 | 0.0 | 1.1 | 3.5 | 2.7 | 0.0 | 9.7 |
| Zambia | 0.1 | 4.1 | 7.5 | 2.3 | 0.4 | 2.1 | 12.3 | 35.2 | 19.0 | 8.8 | 8.1 | 0.0 | 5.3 |
| Italy | 8.4 | 4.2 | 3.0 | 2.7 | 1.7 | 4.4 | 0.9 | 0.0 | 0.0 | 3.5 | 5.4 | 0.0 | 4.6 |
| Uganda | 0.3 | 1.6 | 11.3 | 9.7 | 0.0 | 2.9 | 15.8 | 8.0 | 5.3 | 5.3 | 0.0 | 0.0 | 4.5 |
| Zimbabwe | 0.2 | 3.7 | 1.4 | 1.2 | 0.0 | 0.8 | 3.2 | 45.1 | 17.8 | 0.0 | 2.7 | 0.0 | 4.2 |
| Spain | 7.1 | 4.2 | 0.9 | 1.7 | 4.3 | 4.2 | 1.1 | 0.3 | 0.0 | 21.1 | 5.4 | 0.0 | 4.1 |
| France | 7.1 | 3.7 | 1.7 | 1.1 | 2.1 | 2.9 | 0.3 | 0.0 | 0.0 | 7.0 | 5.4 | 18.2 | 3.7 |
| Australia | 7.1 | 1.6 | 1.3 | 0.6 | 6.0 | 4.5 | 0.9 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 3.6 |
| South Africa | 1.4 | 5.2 | 12.7 | 1.2 | 1.3 | 2.2 | 3.5 | 0.5 | 1.4 | 7.0 | 0.0 | 0.0 | 3.3 |
| Canada | 4.4 | 3.6 | 2.6 | 4.0 | 5.2 | 2.2 | 0.5 | 0.0 | 0.2 | 0.0 | 0.0 | 0.0 | 3.3 |
| Burundi | 0.1 | 4.4 | 1.2 | 2.7 | 0.0 | 11.8 | 5.6 | 1.1 | 16.0 | 0.0 | 0.0 | 0.0 | 2.8 |
| China | 3.7 | 2.4 | 4.4 | 0.7 | 1.1 | 3.7 | 2.7 | 0.0 | 0.9 | 3.5 | 0.0 | 27.3 | 2.8 |
| Grand total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |

In Zanzibar, the beach was the main tourism activity, which is explained by well-maintained white sand beaches. The second in prominence was wildlife tourism, followed by cultural tourism. The prominence of wildlife and mountain climbing activities is largely explained by the fact that most of visitors exiting through Zanzibar also visited these attractions while in Tanzania Mainland (**Chart 2.34**).

### Chart 2.34: Tourism activities in Zanzibar

*Percent*




Note: 'Other' includes shopping, hunting, business and bird watching.

Majority of visitors from South Africa, Italy and Kenya came for beach tourism, while those who came for wildlife tourism were mostly from China, Netherlands and Australia (**Table 2.25**).

### Table 2.25: Top 15 source markets and tourism activities, Zanzibar

*Percent*

| Country of residence | Tourism Activities: Beach | Wildlife | Cultural | Mountain climbing | Visiting friends and relatives | Conference | Diving and sport fishing | Other | Grand total |
|---|---|---|---|---|---|---|---|---|---|
| United Kingdom | 32.5 | 38.8 | 3.7 | 11.3 | 6.2 | 2.4 | 1.8 | 3.3 | 100.0 |
| Italy | 72.2 | 19.3 | 4.7 | 0.4 | 1.4 | 0.4 | 1.1 | 0.4 | 100.0 |
| Germany | 32.4 | 48.2 | 6.9 | 5.2 | 3.5 | 1.8 | 1.3 | 0.8 | 100.0 |
| United States of America | 31.0 | 44.6 | 12.1 | 4.7 | 3.9 | 1.2 | 0.6 | 1.8 | 100.0 |
| South Africa | 80.3 | 1.8 | 5.8 | 0.4 | 0.2 | 6.3 | 3.4 | 1.8 | 100.0 |
| Spain | 24.3 | 58.0 | 5.7 | 3.1 | 2.9 | 0.8 | 5.0 | 0.3 | 100.0 |
| France | 29.4 | 56.6 | 5.6 | 1.6 | 2.8 | 0.6 | 1.9 | 1.6 | 100.0 |
| Australia | 11.7 | 64.0 | 8.6 | 12.6 | 1.4 | 0.0 | 0.0 | 1.8 | 100.0 |
| Canada | 31.8 | 41.7 | 13.0 | 7.8 | 2.6 | 3.1 | 0.0 | 0.0 | 100.0 |
| Switzerland | 24.7 | 56.5 | 4.3 | 7.0 | 4.8 | 0.5 | 0.0 | 2.2 | 100.0 |
| Kenya | 63.7 | 7.8 | 2.8 | 0.0 | 10.6 | 11.2 | 0.0 | 3.9 | 100.0 |
| Netherlands | 20.0 | 66.9 | 7.6 | 2.1 | 1.4 | 2.1 | 0.0 | 0.0 | 100.0 |
| Belgium | 18.1 | 56.2 | 17.1 | 0.0 | 1.0 | 2.9 | 3.8 | 1.0 | 100.0 |
| China | 10.0 | 68.0 | 8.0 | 3.0 | 1.0 | 3.0 | 2.0 | 5.0 | 100.0 |
| Denmark | 27.7 | 24.5 | 10.6 | 7.4 | 20.2 | 4.3 | 2.1 | 3.2 | 100.0 |

Furthermore, Italy led in beach activities, the United States of America in cultural, the United Kingdom in wildlife, mountain climbing and visiting friends and relatives (**Table 2.26**).

### Table 2.26: Tourism activities by top 15 source markets, Zanzibar

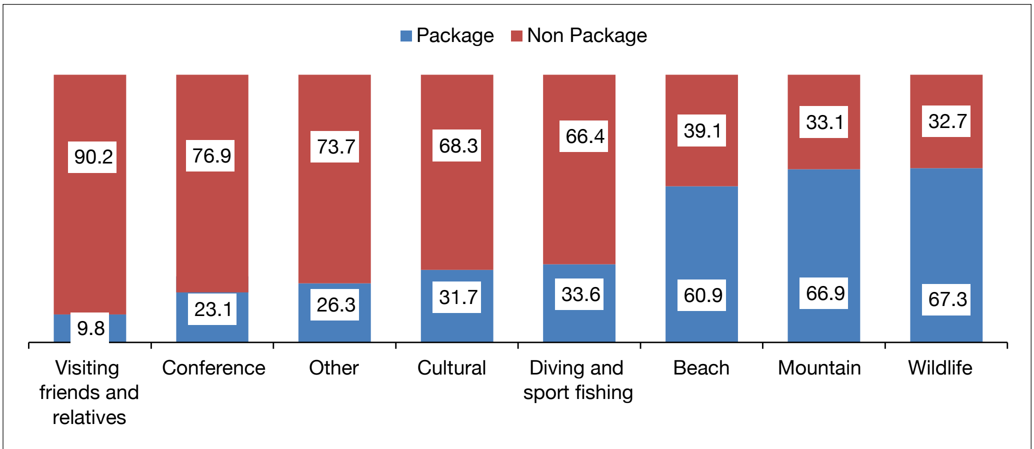
*Percent*

| Country of residence | Tourism Activities: Beach | Wildlife | Cultural | Mountain climbing | Visiting friends and relatives | Conference | Diving and sport fishing | Other |
|---|---|---|---|---|---|---|---|---|
| United Kingdom | 14.1 | 17.6 | 9.8 | 41.4 | 30.0 | 20.2 | 19.8 | 36.2 |
| Italy | 29.4 | 8.2 | 11.6 | 1.4 | 6.2 | 3.2 | 12.1 | 4.3 |
| Germany | 10.9 | 17.0 | 14.2 | 14.6 | 13.3 | 11.3 | 11.0 | 6.4 |
| United States of America | 8.6 | 13.0 | 20.6 | 11.1 | 12.4 | 6.5 | 4.4 | 12.8 |
| South Africa | 15.1 | 0.4 | 6.7 | 0.7 | 0.5 | 22.6 | 16.5 | 8.5 |
| Spain | 3.9 | 9.8 | 5.7 | 4.3 | 5.2 | 2.4 | 20.9 | 1.1 |
| France | 4.0 | 8.0 | 4.6 | 1.8 | 4.3 | 1.6 | 6.6 | 5.3 |
| Australia | 1.1 | 6.3 | 4.9 | 10.0 | 1.4 | 0.0 | 0.0 | 4.3 |
| Canada | 2.6 | 3.5 | 6.4 | 5.4 | 2.4 | 4.8 | 0.0 | 0.0 |
| Switzerland | 1.9 | 4.6 | 2.1 | 4.6 | 4.3 | 0.8 | 0.0 | 4.3 |
| Kenya | 4.8 | 0.6 | 1.3 | 0.0 | 9.0 | 16.1 | 0.0 | 7.4 |
| Netherlands | 1.2 | 4.3 | 2.8 | 1.1 | 1.0 | 2.4 | 0.0 | 0.0 |
| Belgium | 0.8 | 2.6 | 4.6 | 0.0 | 0.5 | 2.4 | 4.4 | 1.1 |
| China | 0.4 | 3.0 | 2.1 | 1.1 | 0.5 | 2.4 | 2.2 | 5.3 |
| Denmark | 1.1 | 1.0 | 2.6 | 2.5 | 9.0 | 3.2 | 2.2 | 3.2 |
| **Grand total** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** | **100.0** |

In terms of tour arrangement**,** the majority of visitors who preferred beach tourism, wildlife tourism and mountain climbing came under the package tour, while majority of the non-package visitors came for conference, culture, sport-diving; and visiting friends and relatives (**Chart 2.35).**

**Chart 2.35: Tourism activity by travel arrangement, Zanzibar**

*Percent*

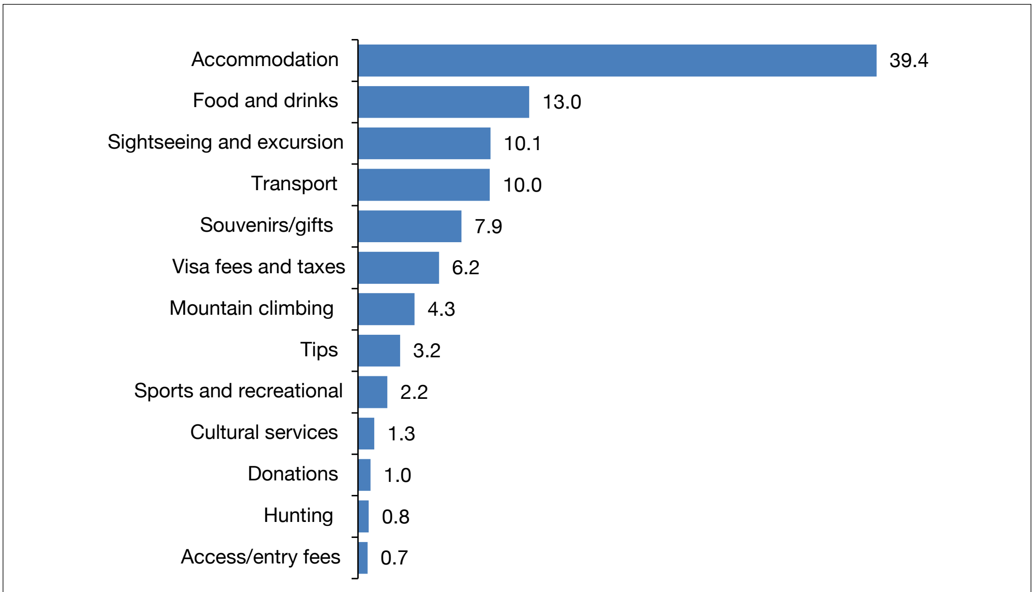



## 2.13 Tourism expenditure in the United Republic of Tanzania

**Chart 2.36** indicates that most of the expenditure under the non-package tour arrangement was spent in accommodation (39.4 percent), followed by food and drink (13.0 percent), excursions (10.1 percent) and sightseeing and transport (10.0 percent).

**Chart 2.36: Tourism expenditure in the United Republic of Tanzania**

*Percent*

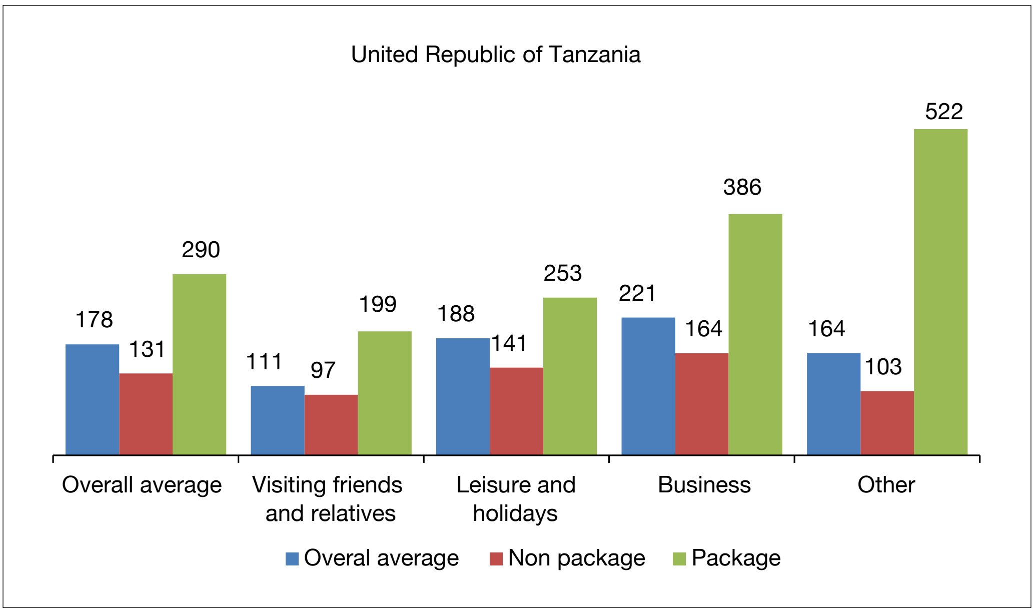


## 2.14 Average expenditure

The survey results indicate that the overall average expenditure per person per night was USD 178, compared to USD 199 recorded in 2015, which is a decrease of 10.6 percent. The decrease in the average expenditure per person is partly explained by the increase in the number of arrivals from the neighboring countries whose expenditures are lower. The average expenditure per person per night for visitors who came the under package tour arrangement was higher (USD 290 per person per night) than for those who the used non-package tour (USD 131 per person per night). Business visitors under the package tour arrangement spent an average of USD 386, compared to those who came for leisure and holidays as well as visiting friends and relatives. On the other hand, visitors who came for leisure and holidays spent a lot more under the non-package tour arrangement. In contrast, tourists who came to visit friends and relatives spent the least under the non-package tour arrangement (**Chart 2.37**).

**Chart 2.37: Average expenditure by purpose of visit and tour arrangement, URT**

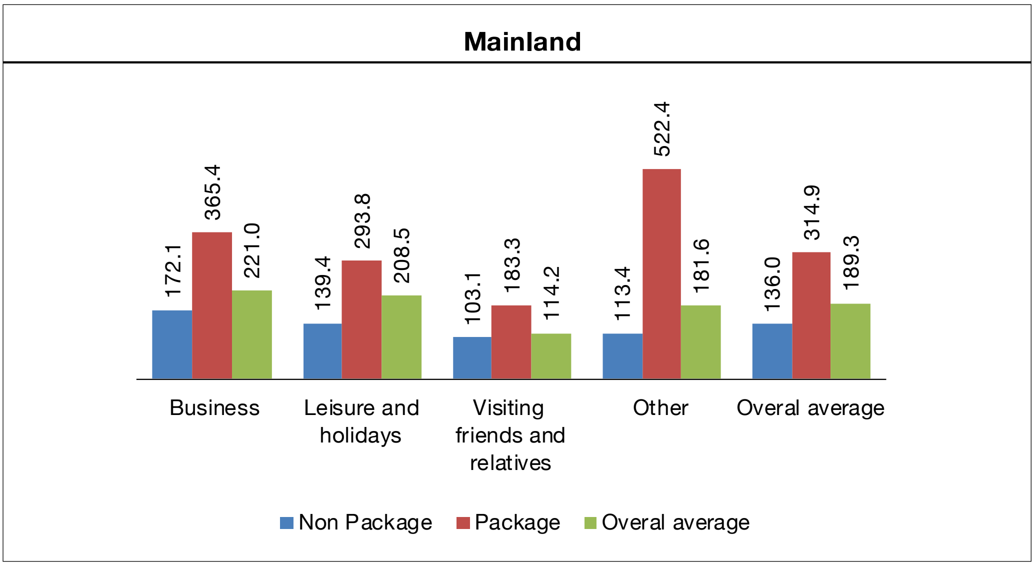
*Value in USD*




As shown in **Chart 2.38**, the overall average expenditure for Tanzania Mainland was USD 189.3 per person per night while for Zanzibar, it was USD 102.6 per person per night. Similar to the case of URT, business visitors spent most in both Tanzania Mainland and Zanzibar with an average of USD 221.0 and USD 167.7, respectively.

**Chart 2.38: Average expenditure by purpose of visit, Tanzania Mainland and Zanzibar**

*Value in USD*



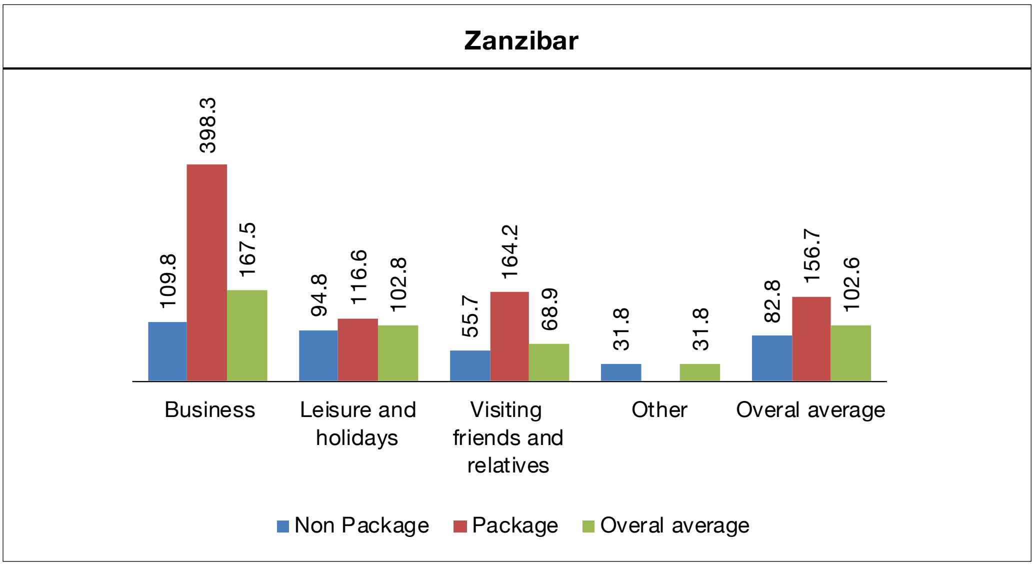



**Table 2.27** shows the average expenditures in the United Republic of Tanzania for top 15 source markets and by purpose of visit. Visitors from China had the highest average expenditures of USD 541 per person per night. Visitors from the United Kingdom, the United States of America, South Africa, Australia, France and Canada spent the most with their average expenditures above the national average of USD 178 per person per night. However, visitors from Burundi and Zambia had minimal average expenditures of about USD 100 per person per night.

**Table 2.27: Average expenditure by purpose of visit for top 15 source markets**

*Value in USD*

| | Purpose of Visit | | | | |
|---|---|---|---|---|---|
| Country of residence | Business | Leisure and holidays | Visiting friends and relatives | Other | Overall average |
| United Kingdom | 434 | 227 | 88 | 175 | 251 |
| Kenya | 312 | 121 | 128 | 107 | 167 |
| United States of America | 281 | 322 | 129 | 174 | 226 |
| Germany | 207 | 182 | 176 | 131 | 174 |
| Italy | 138 | 270 | 57 | 54 | 158 |
| South Africa | 185 | 270 | 160 | 77 | 191 |
| Zambia | 94 | 134 | 61 | 75 | 99 |
| Uganda | 166 | 187 | 32 | 46 | 131 |
| Spain | 242 | 212 | 55 | 85 | 175 |
| Zimbabwe | 241 | 157 | 89 | 14 | 150 |
| France | 212 | 237 | 146 | 317 | 230 |
| Australia | 344 | 249 | 114 | - | 214 |
| Canada | 326 | 265 | 106 | 49 | 186 |
| Burundi | 169 | 21 | 27 | - | 97 |
| China | 521 | 277 | 138 | 1,027 | 541 |

## 2.15 Tourism earnings

Tourism earnings in the United Republic of Tanzania increased by 12.1 percent to USD 2,131.6 million in 2016, from USD 1,902.0 million recorded in 2015. This development is mainly driven by an increase in the number of international tourist arrivals to 1,284,276 from 1,137,182 visitors recorded in 2015. Out of USD 2,131.6 million, USD 1,790.8 million was earned from tourists who came for leisure and holidays while earnings from tourists who came for business were the lowest (**Table 2.28**). The findings also indicate that about 52.0 percent of total earnings were received from visitors who came under the package tour arrangement, while the rest were received from the tourists who came under the non-package tour arrangement.

**Table 2.28: Tourism earnings in URT, 2016**

*Millions of USD*

| Purpose of visit | Travel Arrangement | | Total Earnings |
|---|---|---|---|
| | Package | Non-package | |
| Business | 28.7 | 55.1 | 83.8 |
| Leisure and holidays | 976.5 | 814.3 | 1,790.8 |
| Visiting friends and relatives | 29.0 | 64.8 | 93.8 |
| Other | 81.0 | 82.2 | 163.2 |
| **Tourism Earnings** | **1,115.2** | **1,016.4** | **2,131.6** |

Note: "Other" includes volunteering, religion and scientific and academic purposes

Tourism earnings in Zanzibar increased by 30.4 to USD 383.0 million in 2016 compared with USD 293.5 million earned in 2015, the development which is largely due to increase in the number of international tourist arrivals by 39 percent to 284,519 in 2016 from 202,209 in 2015. As it was for the United Republic of Tanzania, most of the earnings was received from visitors who came for leisure and holidays while earnings from the tourists who came for other purposes were the lowest (**Table 2.29**). However, earnings from the tourists who came under the non-package tour arrangement accounted for the largest share (56 percent) of the total earnings for Zanzibar.

**Table 2.29: Tourism earnings in Zanzibar, 2016**

*Millions of USD*

| Purpose of visit | Travel Arrangement | | Total Earnings |
|---|---|---|---|
| | Package | Non-package | |
| Business | 0.9 | 0.6 | 1.5 |
| Leisure and holidays | 168.3 | 209.9 | 378.2 |
| Visiting friends and relatives | 0.8 | 1.9 | 2.8 |
| Other | 0.0 | 0.4 | 0.4 |
| **Tourism Earnings** | **170.0** | **212.9** | **383.0** |

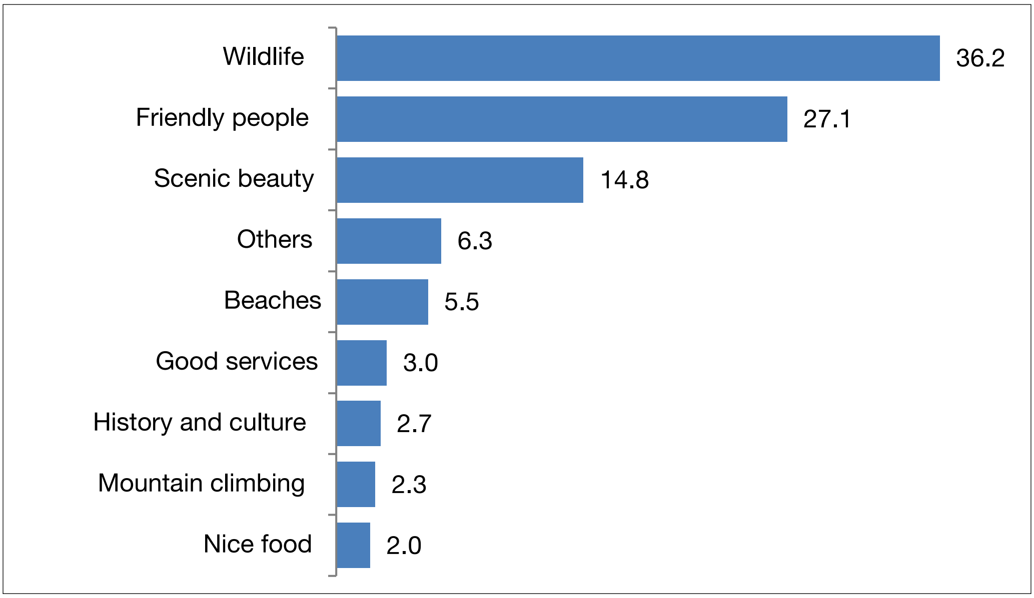
Note: "Other" includes volunteering, religion and scientific and academic purposes

## 2.16 Visitors' impression

The survey findings reveal that wildlife and the scenic beauty of the country impressed about 51 percent of the visitors. The other impressive area was the friendliness of the Tanzanians, which made visitors enjoy their stay. The clean white sandy beaches and the associated activities such as diving and snorkeling also impressed visitors. Good services, history, colorful traditional customs and lifestyles also impressed the visitors during their stay in Tanzania (**Chart 2.39**).

**Chart 2.39: Visitors' impression, URT**

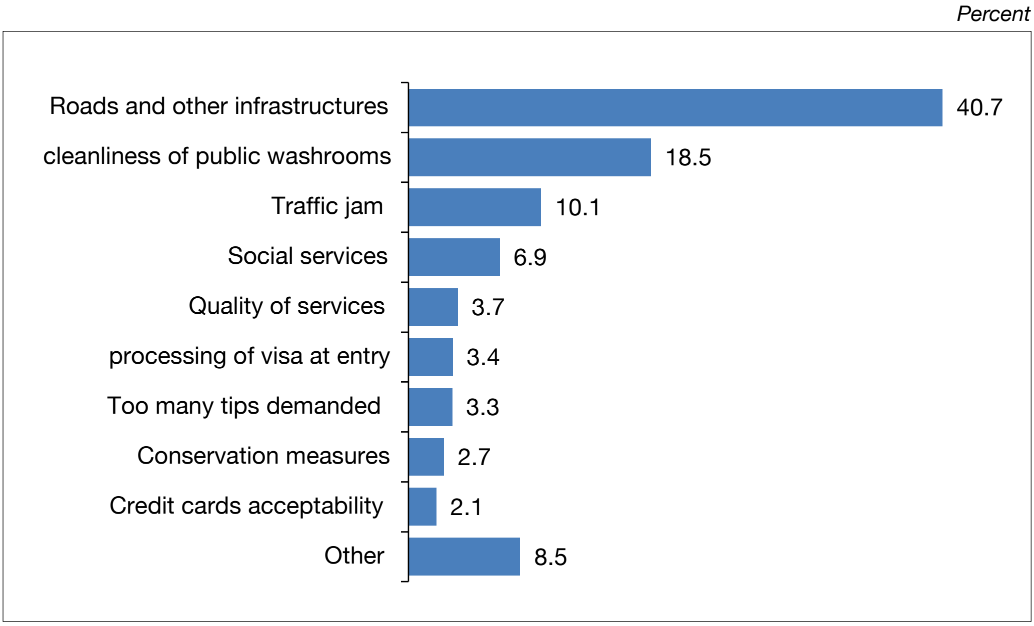
*Percent*




## 2.17 Areas that need improvement

About 41 percent of the visitors expressed their concerns on the conditions of roads and other facilities such as congestion at the entrance to the national parks (**Chart 2.40**). They were also concerned with traffic jams to and from the Julius Nyerere International Airport. Airport facilities like inadequate number of washrooms and cleanliness, defective air conditioners; and slow visa processing were also identified as areas that need improvement. Other concerns were lack of transparency in pricing and information on the tourist attraction and conservation measures. Visitors also complained about unacceptability of credit cards at most of tourism establishments and inadequate Automated Teller Machines (ATMs). However, efforts are being made by the government to address the raised concerns. For example, the ongoing construction of TAZARA flyover at the junction of the Nelson Mandela and Nyerere Road is expected to ease the traffic congestion along the road to the airport.

**Chart 2.40: Areas that need improvement**



# Chapter 3: Conclusion and Recommendations

## 3.1 Conclusion

The International Visitors' Exit Survey was conducted for two weeks during the tourist mini-peak season in 2016. The main objectives of the survey were: to provide an up-to-date price information for estimating tourist expenditure in Tanzania; to improve compilation of National Accounts and Balance of Payments statistics (BOP); and to collect information for tourism promotion and macro-economic policy formulation. The survey has been a success as it has met its objectives.

Earnings from tourism was USD 2,131.6 million in 2016, representing an increase of 12.1 percent from USD 1,902.0 million recorded in 2015 due to a rise in the number of international tourist arrivals. In 2016, the number of international tourist arrivals went up by 12.9 percent to 1,284,279 from 1,137,184 registered in 2015. The overall average expenditure per person per night of a visitor was USD 178 in 2016 lower than USD 199 recorded in 2015.

## 3.2 Recommendations

Based on the survey results, the following are recommended in order to enhance the development of the tourist industry in Tanzania.

a) The survey findings show that an overall average length of stay of persons who visited Tanzania was 9 nights slightly lower than 10 nights recorded during the past five years. In view of this, there is a need of enhancing diversification and promotion of tourism products rather than relying on wildlife tourism in order to prolong the length of stay at a destination and increase tourism earnings. It is worth noting that the government has embarked on the process of identifying beach plots in Tanzania Mainland, suitable for beach tourism in Tanga, Coastal, Dar es Salaam, Lindi and Mtwara regions. This initiative should go in tandem with incentives to attract investments in these areas.

   *Responsible Institutions: MNRT, TTB, LGAs, TCT, ZCT and ZATI*

b) The survey results indicate that about 84 percent of the interviewed visitors settled their bills in cash, an increase of 2.7 percentage points from the previous survey. This indicates that unacceptability of credit cards continues to be a problem to the majority of visitors. This implies that there is need of enhancing efforts to sensitize the owners of tourism establishments and undertake a survey to determine the root cause of unacceptability of credit cards.

*Responsible Institutions: MNRT, BOT, HAT, TCT, ZCT and ZATI*

c) The findings also indicate that the majority of visitors expressed their concerns on the conditions of roads and other facilities, such as entry procedures, which resulted into congestion at the entrance to the national parks. The government is therefore urged to continue with its efforts to improve the roads particularly those leading to Tarangire National Park and other facilities in the national parks.

*Responsible Institutions: MoW, TAA, TCAA, TANAPA and MNRT*

d) Visitors also complained about cleanliness of washrooms in the cities, towns and airports. Therefore, there is a need to enforce municipal laws on cleanliness and public awareness about the usage of garbage collection facilities such as dustbins, which are placed along the roads.

*Responsible Institutions: TAA, TCAA, LGAs, TCT, ZCT, TTB and MNRT*

e) Furthermore, visitors raised concern on lack of transparency in pricing, information on the tourist attraction and conservation measures. There is a need of enhancing availability and accessibility of information materials to tourists at both source markets and entry points. The materials can be in form of leaflets, guide maps and brief handbooks, describing information about places to be visited. In addition, owners of tourist establishments are urged to display the price list for their products.

*Responsible Institutions: MNRT, TTB, TCT, ZCT AND ZATI*

f) The findings indicate that visitors who are 65 years old and above continued to be few. It should be noted that this age group is a potential market given that they have more disposable income and ample time for leisure. However, the group faced physical challenges, which call for a great concern and attention for their safety. This implies that there is a need for the government to design a specific package and facilities which that will meet their specific needs.

*Responsible Institutions: MNRT, TTB, TCT, ZCT AND ZATI*

# Appendices

## Appendix I: Survey Methodology

### I. Introduction

The survey methodology was designed to collect data that would facilitate a better understanding of the status of the tourism sector and provide an instrument that will enable an appropriate follow-up mechanism. This consists of designing a sample and sample selection; survey instruments including a questionnaire; scope and coverage; training; data collection and processing; and estimation of tourist expenditure. The main objective of the survey is to provide reliable information about visitors to Tanzania, including their number, length of stay, expenditure, travel arrangement and their demographic characteristics.

### II. Objective of the survey

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

### III. Scope of the survey

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

### IV. Sample size

The survey was done on sample basis. It was planned to interview 11,372 departing international visitors, equivalent to one percent of the international visitors recorded in 2015. Ultimately, the survey managed to randomly interview about 9,198 respondents, who represented around 16,639 visitors in the sample. This sample was considered sufficient to meet the survey's objectives.

## V. Fieldwork

The data collection exercise was undertaken for a period of two weeks between August and September 2016. Eight teams; seven in Mainland and one in Zanzibar collected the data. The technical Committee members participated in the field supervision of the interviews to ensure the questionnaires completeness, quality and consistency.

## VI. Survey coverage

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

## VII. Enumerators' manual

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

## VIII. Training of enumerators

The Technical Committee's members organized a one-day training of enumerators and supervisors. A total of 26 enumerators and seven supervisors were trained. The purpose of the training was to guide the enumerators to understand the questionnaire and equip them with interviewing techniques. Enumerators were also trained in methods of field editing, data quality control procedures and fieldwork coordination. The Enumerators' Manual was used as a guideline document during the training.

## IX. The Questionnaire

The questionnaire was designed to ensure that the questions asked were in line with user's data needs. The information collected is useful for tourism promotion and macroeconomic policy formulation. A single questionnaire was used to gather information for the 2016 International Visitors` Exit Survey. The content of the questionnaire was based on the previous years' questionnaires, with slight modifications. The questionnaire used in the survey had 23 questions and it comprised four main parts, namely: visitor profiles, travel behavior, expenditure patterns and visitor's comments (**Appendix II**).

**Questions 1 to 9** aimed at establishing the visitor's profiles (nationality, country of residence, travel party, age group, gender, purposes of visit, type of tourism activity and source of information about Tanzania).

**Questions 10 to 15** aimed at obtaining information about type of tour arrangement (package/non-package), items in the package, costs of package tour, number of nights spent and cost of international transport (Return air ticket).

**Questions 16 to 19** were structured to establish number of night spent in Tanzania Mainland and Zanzibar and tourists' earnings ascribed to Tanzania. In addition, the questions probed for details on the amount of money spent in Tanzania.

**Question 20 and 21** asked the visitors about most used mode of payment while in Tanzania and whether they were visiting Tanzania for the first time or not.

**Question 22 and 23** sought information about areas that impressed the visitors and those which need improvement.

## X. Data processing

The processing of the 2016 International Visitors' Exit Survey data began after completion of the fieldwork. Data processing involved manual editing, coding of open-ended questions, data entry and editing of computer-identified errors. Data entry and editing were accomplished using the ORACLE11g database and web-based application.

## XI. Tourist expenditure estimation

Tourists' expenditure in the country was estimated using the Tourist Expenditure Model that was developed during the comprehensive International Visitors' Exit Survey conducted in 2001. The model uses the following variables in estimating tourists' expenditure: average expenditure by travel arrangement by purpose of visit, proportion of international tourist arrivals by travel arrangement and average length of the stay. Data on average expenditure by travel arrangement by purpose of visit, proportion of international tourist arrivals by travel arrangement and average length of the stay were obtained from the survey, while the number of international tourist arrivals was obtained from the Immigration Department.

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

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

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

$V_{NP}$ = Number of international tourist arrivals under the **Non-package** travel arrangement (The number of international tourist arrivals as recorded by the Immigration Department, proportionately adjusted into non-package visitors using the 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 number of International Tourist Arrivals (sourced from Immigration Dept) | Number of International Tourist Arrivals by Travel arrangement | | Average length of Stay | Average 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 2016:**

- 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 international carriers that bring visitors to Tanzania.

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

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

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

- The Immigration Department also provided the number of international tourist arrivals for Zanzibar that enabled the estimation of tourists' expenditure for Zanzibar.

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

# Appendix II: Questionnaire

**THE 2016 INTERNATIONAL VISITORS' EXIT SURVEY**

**Please read the instructions carefully before filling the form.**

## INTRODUCTION

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

**Your Cooperation is Highly Appreciated**

***FOR OFFICIAL USE*:**

*CODE NUMBER:* ______________________________

*NAME OF THE RESEARCHER:* ______________________________

*DATE:*______________________ *SIGNATURE:* ______________________

*NAME OF THE DATA ENTRANT:* ______________________________

1. Nationality____________________ Country of Residence ________________

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

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

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

| | |
|---|---|
| With spouse | [ ] |
| With children | [ ] |
| With spouse and children | [ ] |
| With other friends and relatives | [ ] |
| With parents | [ ] |
| Alone (*If Yes go to question no. 6)* | [ ] |

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

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

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

6. Gender (including yourself)

| | |
|---|---|
| Number of Females | |
| Number of Males | |

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

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

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

| | | | |
|---|---|---|---|
| Wildlife tourism | [ ] | Hunting tourism | [ ] |
| Beach tourism | [ ] | Conference tourism | [ ] |
| Cultural tourism | [ ] | Vehicle clearance/pick up | [ ] |
| Bird watching | [ ] | Shopping | [ ] |
| Diving and Sport Fishing | [ ] | Others (please specify): ....... | [ ] |
| Mountain climbing | [ ] | | |

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

| | | | |
|---|---|---|---|
| Travel agent, tour operator | [ ] | Tanzania Mission Abroad | [ ] |
| Friends, relatives | [ ] | TV Networks i.e. CNN, BBC (please specify):............ | [ ] |
| Trade fair | [ ] | Radio Station (please specify): ...... | [ ] |
| Newspaper, magazines, brochures | [ ] | Web (please specify): .................... | [ ] |
| Inflight magazines | [ ] | Others (please specify): ......... | [ ] |
| Travel Advisory | [ ] | | |

10. Did you travel in package tour or independently?

| | Package | Independently |
|---|---|---|
| *If you travelled independently, go to question 14* | | |

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

| | | | |
|---|---|---|---|
| International transport (Air ticket) | [ ] | Sightseeing/excursion | [ ] |
| Accommodation | [ ] | Guided Tour | [ ] |
| Food and Drinks | [ ] | Travel insurance | [ ] |
| Internal transportation in Tanzania | [ ] | Other (please specify).............. | [ ] |

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

13. Is the total cost for the whole group? (*Tick*) Yes [ ] No [ ]

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

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

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

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

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

| | | Amount |
|---|---|---|
| Hotel | Currency.......... | |
| Others (Lodges, Motels, Campsites etc.) | Currency.......... | |
| Food and drinks | Currency.......... | |
| Internal transportation while in Tanzania | | |
| By Air | Currency.......... | |
| By Road | Currency.......... | |
| By Water | Currency.......... | |
| by Railway | Currency.......... | |
| Rentals (Car hires, Charters, Boats, etc) | Currency.......... | |
| Cultural Services (Museums, Historical Sites, etc.) | Currency.......... | |
| Sports and Recreational ( Diving, cycling etc) | Currency.......... | |
| Sight Seeing and Excursion | Currency.......... | |
| Mountain Climbing | Currency.......... | |
| Hunting | Currency.......... | |
| Access/entry/gate fees | Currency.......... | |
| Visa fees and taxes | Currency.......... | |
| Souvenirs (gifts), precious metals, crafts, etc | Currency.......... | |
| Tips | Currency.......... | |
| Donations | Currency.......... | |
| Other (please specify) | Currency.......... | |

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

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

Cash [ ] Traveller's Cheques [ ]

Credit Card [ ] Other (please specify) [ ]

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

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

.....................................................................................................................

.....................................................................................................................

.....................................................................................................................

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

.....................................................................................................................

.....................................................................................................................

.....................................................................................................................

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

## Appendix III: International Tourist Arrivals

| Country of Residence | Number of Visitors | % Share |
|---|---|---|
| Kenya | 233,730 | 18.2 |
| United States of America | 86,860 | 6.8 |
| India | 69,876 | 5.4 |
| United Kingdom | 67,742 | 5.3 |
| Burundi | 63,530 | 4.9 |
| Germany | 57,643 | 4.5 |
| Italy | 50,715 | 3.9 |
| Rwanda | 47,056 | 3.7 |
| South Africa | 43,468 | 3.4 |
| Uganda | 37,870 | 2.9 |
| China | 34,472 | 2.7 |
| Zambia | 28,836 | 2.2 |
| France | 24,611 | 1.9 |
| Netherlands | 24,197 | 1.9 |
| Israel | 22,967 | 1.8 |
| Zimbabwe | 22,148 | 1.7 |
| Malawi | 19,348 | 1.5 |
| Canada | 18,489 | 1.4 |
| Mozambique | 17,744 | 1.4 |
| Australia | 15,356 | 1.2 |
| Spain | 15,308 | 1.2 |
| Switzerland | 14,352 | 1.1 |
| Sweden | 14,196 | 1.1 |
| Denmark | 13,901 | 1.1 |
| Oman | 12,624 | 1.0 |
| Democratic Republic of Congo | 11,050 | 0.9 |
| Belgium | 10,898 | 0.8 |
| Norway | 10,238 | 0.8 |
| Finland | 9,743 | 0.8 |
| Poland | 8,941 | 0.7 |
| Comoro | 8,431 | 0.7 |
| Pakistan | 8,062 | 0.6 |
| Turkey | 7,653 | 0.6 |
| Russia | 7,435 | 0.6 |
| Ukraine | 6,526 | 0.5 |
| Austria | 6,448 | 0.5 |
| Korea (South) | 5,941 | 0.5 |
| Japan | 5,633 | 0.4 |
| Czech | 5,617 | 0.4 |

| Country of Residence | Number of Visitors | % Share |
|---|---|---|
| Nigeria | 5,260 | 0.4 |
| Ireland | 4,462 | 0.3 |
| New Zealand | 3,849 | 0.3 |
| Romania | 3,572 | 0.3 |
| Portugal | 3,490 | 0.3 |
| Brazil | 3,299 | 0.3 |
| Egypt | 3,177 | 0.2 |
| Ghana | 2,804 | 0.2 |
| Philippines | 2,596 | 0.2 |
| Fiji | 2,568 | 0.2 |
| United Arab Emirates | 2,538 | 0.2 |
| South Sudan | 2,374 | 0.2 |
| Somalia | 2,204 | 0.2 |
| Sri Lanka | 2,061 | 0.2 |
| Mexico | 2,018 | 0.2 |
| Bulgaria | 1,998 | 0.2 |
| Slovakia | 1,895 | 0.1 |
| Greece | 1,791 | 0.1 |
| Swaziland | 1,692 | 0.1 |
| Ethiopia | 1,673 | 0.1 |
| Syria | 1,627 | 0.1 |
| Congo (Bra) | 1,584 | 0.1 |
| Namibia | 1,565 | 0.1 |
| Singapore | 1,557 | 0.1 |
| Slovenia | 1,548 | 0.1 |
| Croatia | 1,537 | 0.1 |
| Botswana | 1,528 | 0.1 |
| Mauritius | 1,526 | 0.1 |
| Iran | 1,485 | 0.1 |
| Hungary | 1,439 | 0.1 |
| Argentina | 1,378 | 0.1 |
| Sudan | 1,360 | 0.1 |
| Malaysia | 1,269 | 0.1 |
| Qatar | 1,207 | 0.1 |
| Thailand | 1,189 | 0.1 |
| Cameroon | 1,187 | 0.1 |
| Vietnam | 1,181 | 0.1 |
| Estonia | 1,126 | 0.1 |
| Angola | 1,093 | 0.1 |
| Taiwan | 1,091 | 0.1 |

| Country of Residence | Number of Visitors | % Share |
|---|---|---|
| Yemen | 1,064 | 0.1 |
| Indonesia | 1,010 | 0.1 |
| Uruguay | 968 | 0.1 |
| Serbia | 951 | 0.1 |
| Chile | 946 | 0.1 |
| Morocco | 929 | 0.1 |
| Madagascar | 920 | 0.1 |
| Nepal | 911 | 0.1 |
| Colombia | 847 | 0.1 |
| Lithuania | 807 | 0.1 |
| Algeria | 792 | 0.1 |
| Myanmar | 774 | 0.1 |
| Lebanon | 699 | 0.1 |
| Seychelles | 694 | 0.1 |
| Bangladesh | 672 | 0.1 |
| Lesotho | 645 | 0.1 |
| Sao Tome | 611 | 0.0 |
| Coute de Voire | 595 | 0.0 |
| Jordan | 555 | 0.0 |
| Kuwait | 520 | 0.0 |
| Saud Arabia | 497 | 0.0 |
| Belarus | 463 | 0.0 |
| Bergin | 462 | 0.0 |
| Burkinabe | 451 | 0.0 |
| Uno | 447 | 0.0 |
| Luxembourg | 445 | 0.0 |
| Cyprus | 438 | 0.0 |
| Georgia | 419 | 0.0 |
| Iceland | 384 | 0.0 |
| Venezuela | 357 | 0.0 |
| Peru | 350 | 0.0 |
| Tunisia | 350 | 0.0 |
| Dominica | 345 | 0.0 |
| Gambia | 340 | 0.0 |
| Guinea | 337 | 0.0 |
| Jamaica | 330 | 0.0 |
| Malagasy | 327 | 0.0 |
| Netherland | 323 | 0.0 |
| Senegal | 313 | 0.0 |
| Latvia | 305 | 0.0 |

| Country of Residence | Number of Visitors | % Share |
|---|---|---|
| Armenia | 296 | 0.0 |
| Korean (North) | 293 | 0.0 |
| Liberia | 281 | 0.0 |
| Bolivia | 270 | 0.0 |
| Togo | 265 | 0.0 |
| Bahrain | 255 | 0.0 |
| Trinidad | 254 | 0.0 |
| Costa Rica | 250 | 0.0 |
| Benin | 249 | 0.0 |
| Bosnia | 249 | 0.0 |
| Cuba | 244 | 0.0 |
| Macedonia | 238 | 0.0 |
| Malta | 226 | 0.0 |
| Mauritania | 224 | 0.0 |
| Honduras | 222 | 0.0 |
| Hong Kong | 216 | 0.0 |
| Afghanistan | 204 | 0.0 |
| Sierra Leone | 201 | 0.0 |
| Ecuador | 188 | 0.0 |
| Iraq | 184 | 0.0 |
| Djibouti | 177 | 0.0 |
| Tajikistan | 165 | 0.0 |
| Mali | 163 | 0.0 |
| Niger | 153 | 0.0 |
| Cape Verde | 146 | 0.0 |
| Kazakhstan | 135 | 0.0 |
| Chad | 132 | 0.0 |
| Palestine | 132 | 0.0 |
| Albania | 127 | 0.0 |
| Libya | 123 | 0.0 |
| Papua New Guinea | 106 | 0.0 |
| Central Africa | 98 | 0.0 |
| Suriname | 96 | 0.0 |
| Cambodia | 95 | 0.0 |
| El-Salvador | 91 | 0.0 |
| Hellenic | 88 | 0.0 |
| Paraguay | 86 | 0.0 |
| Gabon | 83 | 0.0 |
| Guatemala | 81 | 0.0 |
| Burma | 80 | 0.0 |
| Kosovo | 77 | 0.0 |
| Moldovia | 77 | 0.0 |

| Country of Residence | Number of Visitors | % Share |
|---|---|---|
| San Marino | 74 | 0.0 |
| Eritrea | 72 | 0.0 |
| Tuvalu | 68 | 0.0 |
| Antigua | 58 | 0.0 |
| Monegasque | 52 | 0.0 |
| Mongolia | 52 | 0.0 |
| Andorra | 48 | 0.0 |
| Liechtenstein | 45 | 0.0 |
| Cocos | 40 | 0.0 |
| Barbados | 36 | 0.0 |
| Uzbekistan | 36 | 0.0 |
| Guyana | 34 | 0.0 |
| Haitian | 31 | 0.0 |
| St. Kitts & Davis | 29 | 0.0 |
| Azerbaijan | 28 | 0.0 |
| Grenada | 20 | 0.0 |
| Maldives | 20 | 0.0 |
| Guinea Bissau | 17 | 0.0 |
| Solomon | 17 | 0.0 |
| Equatorial Guinea | 14 | 0.0 |
| Bahama | 13 | 0.0 |
| Kyrgyz | 13 | 0.0 |
| Nicaragua | 13 | 0.0 |
| Yugoslavia | 10 | 0.0 |
| Alina | 8 | 0.0 |
| Brunei | 8 | 0.0 |
| Montenegro | 8 | 0.0 |
| Belize | 7 | 0.0 |
| Bermuda | 7 | 0.0 |
| Bhutan | 5 | 0.0 |
| St. Vincentia | 5 | 0.0 |
| Stateless | 5 | 0.0 |
| Panama | 4 | 0.0 |
| Puerto Rico | 4 | 0.0 |
| Macao | 3 | 0.0 |
| Monaco | 3 | 0.0 |
| St. Pierre | 3 | 0.0 |
| St. Lucia | 1 | 0.0 |
| Tonga | 1 | 0.0 |
| Venda | 1 | 0.0 |
| **Grand Total** | **1,284,279** | **100.0** |

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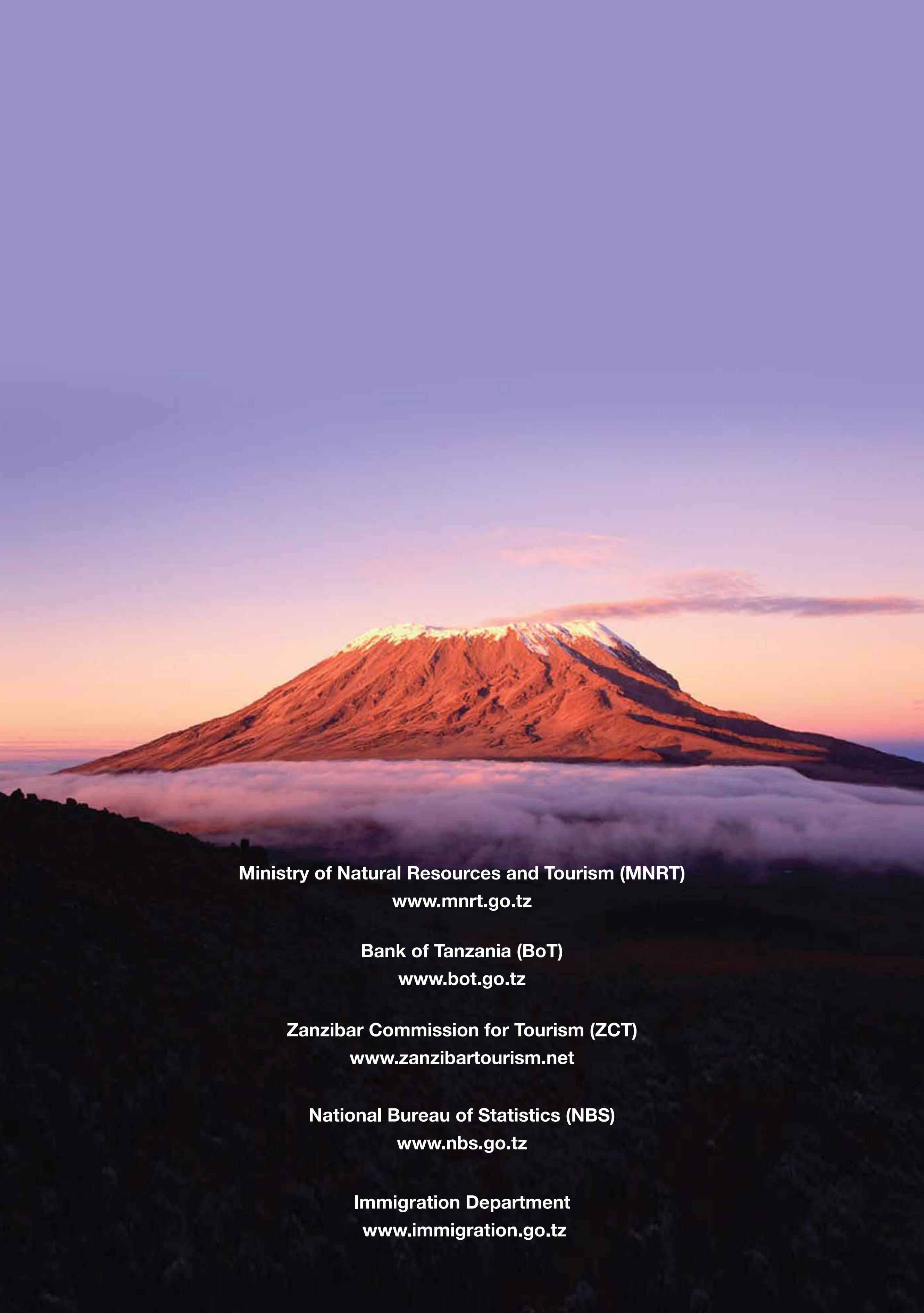

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**www.mnrt.go.tz**

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**www.bot.go.tz**

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**www.zanzibartourism.net**

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