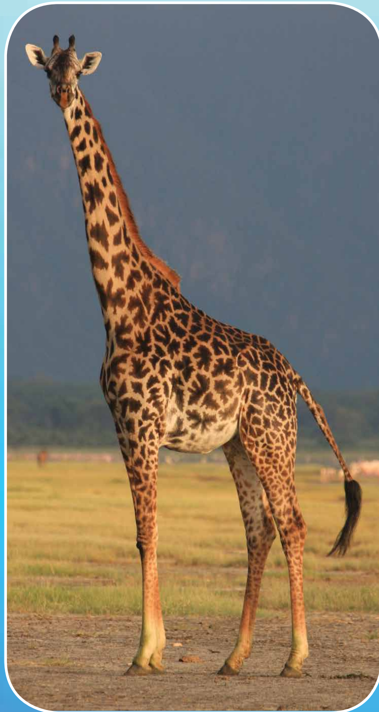
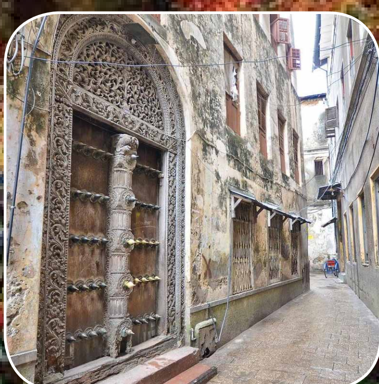
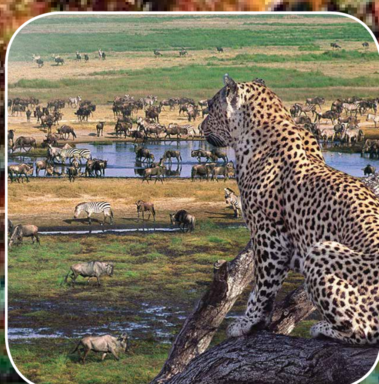
The 2017 International Visitors' Exit Survey Report







TANZANIA TOURISM SECTOR SURVEY

2017 INTERNATIONAL VISITORS' EXIT SURVEY REPORT

OCTOBER 2018

TABLE OF CONTENTS

LIST OF TABLES

LIST OF CHARTS

ACRONYMS

AAKIA	Abeid Amani Karume International Airport
BOT	Bank of Tanzania
HAT	Hotel Association of Tanzania
HOR	Horohoro
JNIA	Julius Nyerere International Airport
KIA	Kilimanjaro International Airport
LGAs	Local Government Authorities
MNY	Manyovu
MNRT	Ministry of Natural Resources and Tourism
MWTC	Ministry of Works, Transport and Communication
MTK	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 7.0 percent to 1,322 million in 2017 compared with 1,239 million in 2016, surpassing the growth rate of 3.9 percent recorded in the previous year. The performance was mainly associated to improved global economy. Growth was higher in Europe, particularly Germany. On the other hand, the Americas registered the lowest growth rate for two consecutive years since 2016. This is partly explained by the consequences of the outbreak of zika virus, particularly in the Caribbean and Latin America. Growth in Africa was 7.8 percent compared with 7.7 percent of 2016, hence exceeding the world average. Despite the higher growth, Africa's market share of international tourist arrivals remained at the lowest, below 5.0 percent. This calls for enhanced promotion of Africa's tourist destinations and packages.

This report unveils the results of the 2017 Tanzania Tourism Sector Survey (TTSS), conducted jointly by the Ministry of Natural Resources and Tourism (MNRT), Bank of Tanzania (BOT), National Bureau of Statistics (NBS), Immigration Services Department and the Zanzibar Commission for Tourism (ZCT).

Tourism earnings increased by 5.6 percent to USD 2,250.3 million compared with USD 2,131.57 recorded in 2016. This development is explained by increase in international tourist arrivals by 3.3 percent to 1,327,143. In Zanzibar, tourism earnings rose by 21.7 percent to USD 489 million; owing also to increase in the number of tourists arrivals. The major source markets were the United States of America and the United Kingdom. In sub-Saharan Africa, Kenya was the dominant source market, followed by South Africa and Uganda. Meanwhile, leisure and holidays continued to be the main purpose of visit to Tanzania and the major tourism activities were the wildlife and the beaches. The report is expected to provide an insightful information to various stakeholders, including inputs for policy making and marketing strategies.

Hon. Dr. Hamisi Kigwangalla (MP)
Minister
Ministry of Natural Resources and Tourism

Prof. Florens A. M. Luoga
Governor
Bank of Tanzania

ACKNOWLEDGEMENT

The Steering Committee of the Tanzania Tourism Sector Survey Project would like to express its appreciation to various stakeholders involved in data collection and preparation of the report for 2017 International Visitors' Exit Survey. Special thanks 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 entrants for their commitment and hard work.

The overall supervision of this work was under the conscientious leadership of Mr. Zahoro A. Kimwaga (Director of Tourism – MNRT) and Johnson J. Nyella (Director, Economic Research and Policy-BOT). The Technical Team was led by Mr. Paskasi D. Mwiru, Assistant Director of Tourism (MNRT) and Mr. Festo Mlele, Manager, International Economics and Trade Department (BOT). Other members of the team were Dr. Charles Masenya (BOT), Ms. Villela A. Waane (BOT), Mr. Phillip G. Mboya (BOT), Mr. Evarist A. Mgangaluma (BOT), Mr. Josephat Msimbano (MNRT), Mr. Valerian Tesha (NBS), Ms. Eliaranya Lema (NBS), Ms. Jovitha J. Rugemalila (NBS), Mr. Christian F. Mndeme (Immigration Services Department) and Mr. Maabad M. Jaffer (ZCT). We also treasure the hard work of the IT team, which, was composed of Mr. Rweyemamu Barongo and Rogart Urio from BOT.

EXECUTIVE SUMMARY

Introduction

The international visitors' exit survey is conducted annually. The primary objective of the survey is collect data for estimation of tourist expenditure in the country. The data collected will also be used in compilation of the National Accounts and Balance of payments statistics. Further, these statistics will be useful in policy formulation, planning and decision making processes.

Global tourism developments

The global international tourist arrivals in 2017 went up by 7.0 percent to 1,322 million from 1,239 million recorded in 2016. This rise was on account of global economic recovery and robust demand from traditional and emerging source markets (UNWTO, 2018). Europe registered the highest growth which was 8.4 percent; followed by Africa with growth of 7.8 percent. The UNWTO World Tourism Barometer of 2018 projects that global international tourist arrivals will grow by between 4.0 and 5.0 percent in 2018, with a strong growth in Africa, Asia and the Pacific and the Middle East. In Tanzania, the number of tourist arrivals increased to 1,327,143 from 1,284,279 visitors recorded in 2016.

Recent tourism developments in the United Republic of Tanzania

Several initiatives were undertaken in order to improve the tourism sector including:

i. The fourth annual Diaspora homecoming conference was held in Zanzibar in August 2017. The Conference brought together Tanzanians living abroad to exchange ideas and explore investment opportunities available in the country,

ii. A workshop on sustainable management and development of fisheries resources in the Indian Ocean Rim region was held in Zanzibar in October 2017. The workshop aimed at developing fisheries resources and deep sea fishing with a view to maximize utilization of fisheries resources among the Indian Ocean Rim Association (IORA) member states. Fishing and sea sports are among important and potential activities for tourism attractions in the coastal areas.

iii. The government is developing new brand for destination Tanzania, which led to the establishment of National Branding Committee in December 2017. The committee is tasked to work closely with key stakeholders in the tourism sector and strategize on how best to brand Tanzania amid intensifying competition for tourists worldwide,

iv. The national tourism policy of 1999 is being reviewed to align it with innovations and improvements that have taken place in the sector with a view to attract more visitors and hence boost tourist earnings,

v. The Old Boma building in Dar es Salaam is being refurbished and upgraded to a one stop center for tourism and heritage. This initiative is expected to promote city tourism and hence diversification of tourism activities in the country. The building will serve as a centre for education, community outreach and public cultural events,

vi. The Government in collaboration with Swiss State Secretariat for Economic Affairs (SECO) has embarked on a project called tourism for improving livelihood. This has improved linkages between horticultural producers and processors and the hotel industry as well as enhancing broader tourism sector market access.

Main findings of the surveys

Main source markets are being diversified with Europe continues to lead.

The results show that, majority of the visitors came from Europe, emerging and developing economies and Americas. Most of the visitors from Europe were from the United Kingdom, Italy and Germany. China, Australia, South Africa and India were among the major source markets in the emerging economies.

Tourism earnings continued to increase

Tourism earnings rose by 5.6 percent to USD 2,250.3 million in 2017, mainly due to increased number of international tourist arrivals. About 85 percent of these earnings accrued from expenditure from visitors who came for leisure and holidays. Earnings from tourists who came to visit friends and relatives were the lowest.

Holidaymakers spent the most

Visitors who came under the package tour arrangement spent an average of USD 411 per day per night while those under the non-package tour arrangement spent an average of USD 136 per person per night. Visitors coming for leisure and holidays were the highest spenders at an average of USD 356 per person per night and mainly came from the United States of America, China, the United Kingdom, Canada and Norway.

Majority of the visitors stayed between 8 to 14 nights

The survey results revealed that about 36 percent of all visitors stayed between 8 to 14 nights. Visitors who came for leisure and holidays and visiting friends and relatives stayed for an average of 10 nights while those who came for religious and volunteering stayed the longest with an average of 12 nights. Visitors who came for business purposes registered smallest number of 8 nights. The overall length of stay for visitors to Tanzania was 10 nights.

Wildlife tourism continues to be the main activity

Wildlife continued to be the main tourism activities due to the country's endowment in wildlife resources. Tanzania is the only country in the world, which has allocated more than 25 percent of its total area for wildlife and other resources' conservation ranging from 16 national parks, 28 game reserves, 44 game controlled areas, Ngorongoro Conservation, and two marine parks.

Cash continued to be the main mode of payment

About 73 percent of the interviewed visitors settled their bills in cash followed by those who paid through credit cards. The results show that despite the dominance of payment by cash, there is an improvement on the use of credit cards to 19.3 percent of the interviewed visitors from 15.8 percent recorded in 2016.

Recommendations;

a) The survey results indicate that the overall average length of stay of visitors to the United Republic of Tanzania has remained around 10 nights for the past six years. This implies that efforts still need to be made to enhance diversification and promotion of the tourism products in order to increase the number of nights spent at a destination. The increase in the length of stay of visitors is likely to have a positive impact on the tourism earnings.

b) The findings indicated that unacceptability of credit cards at most of the tourism establishments continue to be a problem. About 19.0 percent of interviewed visitors paid their bills through credit cards while about 73.0 percent settled their bill through cash. This implies that there is a need to sensitize owners of tourism establishment and other relevant stakeholders on the importance and benefits of allowing visitors to make use of credit cards when settling their bills.

c) The findings also indicate that some visitors were not contented with the level of hygiene in cities and airports. Therefore, there is a need for municipal authorities to reinforce cleanliness laws and regulations. For instance, increase sanitary facilities, litterbin along the streets and increased awareness on hygiene.

d) Traffic jam in Dar es Salaam and rough roads in some national parks were also issues of concern to tourists. The construction of TAZARA fly over and Ubungo interchange is expected to reduce the problem of traffic jam in Dar es Salaam. However, the government is advised to speed up the ongoing efforts of addressing infrastructural issues.

e) Visitors also raised concerns on the time taken in processing entry visa at airports and other entry points. In this regard, it is worth noting that the government has embarked on e-immigration program to facilitate, among others, issuance of e-visa, which is expected to be ready by June, 2018. In addition, completion of terminal III at JNIA is also expected to provide conducive environment to speed up visa processing on arrival. These initiatives need to be expedited.

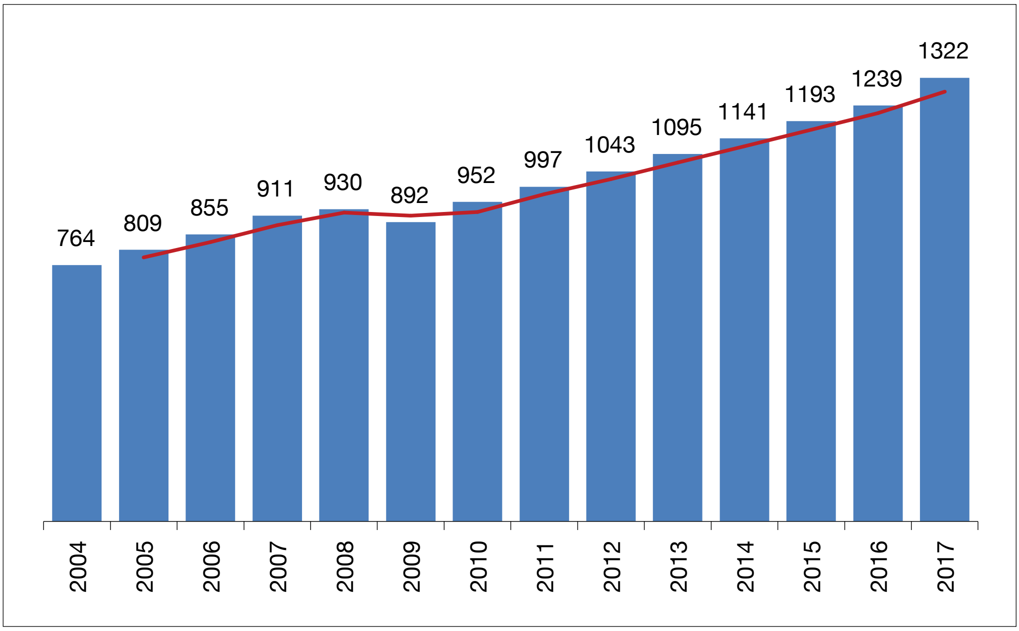
Chapter 1: Recent Developments in the Tourism Industry

1.1 Global Perspective

According to the UNWTO World Tourism Barometer, 2018; international tourist arrivals went up to 1,322 million in 2017, equivalent to 7.0 percent increase from 1,239 million in 2016 (**Chart 1.1**). The increase is partly attributed to global economic recovery and robust demand from traditional and emerging source markets in Brazil and Russia. It is worth noting that, this is the eighth consecutive year of sustained growth following the decline of 2009, which resulted from economic and financial crisis.

Chart 1.1: Global international tourist arrivals, 2004-2017

In millions



Source: UNWTO Barometer, January 2018

Growth of international tourist arrivals by region indicate that Europe led by registering a growth of 8.4 percent in 2017, followed by Africa with growth of 7.8 percent and Middle East by 4.9 percent. Conversely, Americas and; Asia and the Pacific recorded lower growth in 2017 compared to 2016 (**Table 1.1**).

Table 1.1: International tourist arrivals by regions, 2010-2017

Region	2010	2011	2012	2013	2014	2015	2016	2017
				In Millions				
Europe	488	521	541	567	580	605	619	671
Asia and the Pacific	208	218	234	250	264	284	306	324
Americas	150	156	163	168	182	194	201	207
Africa	50	50	52	55	55	54	58	62
Middle East	55	50	51	49	55	57	56	58
				Percentage change				
Europe	5.7	6.8	3.9	4.7	2.4	4.3	2.4	8.4
Asia and the Pacific	15.0	4.9	7.1	6.9	5.8	7.4	7.7	5.9
Americas	6.9	3.5	4.5	3.1	8.5	6.5	3.7	2.9
Africa	7.9	-0.6	4.6	4.4	0.9	-3.1	7.7	7.8
Middle East	6.5	-10.6	2.2	-3.0	12.8	2.9	-2.5	4.9

Source: UNWTO World Tourism Organization Barometer, Various issues

The distribution of international tourist arrivals by region indicate that Europe continued to account for the largest share in 2017, followed by Asia and the Pacific, the Americas, Africa and the Middle East (**Table 1.2**). However, the share of Africa increased while that of the Middle East declined in 2017 when compared with 2016.

Table 1.2: Market shares of international tourist arrivals

Percent

Region	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**
Asia and the Pacific	22.5	23.0	23.3	23.8	24.7	24.5
Europe	52.0	52.1	51.0	50.7	50.0	50.8
Middle East	4.9	4.5	4.9	4.8	4.5	4.4
Africa	5.0	5.0	4.9	4.5	4.6	4.7
Americas	15.6	15.4	16.0	16.2	16.2	15.6
World	100.0	100.0	100.0	100.0	100.0	100.0

Source: UNWTO World Tourism Organization Barometer, Various issues

UNWTO projections indicate that international tourist arrivals worldwide will grow by between 4.0 and 5.0 percent in 2018 (**Table 1.3**). Region-wise, the growth is expected to be strong in Africa, Asia and the Pacific and the Middle East. The growth in Americas and Europe are expected to be between 3.5 and 4.5 percent, lower than in other regions.

Table 1.3: International tourist arrivals- actual growth and projection

Percent

Regions	Actual growth 2015	2016	2017	Average 2005-2017	Projection 2018
World	4.6	3.9	6.7	3.9	4.0 to 5.0
Europe	4.7	2.4	8.4	3.1	3.5 to 4.5
Asia and the Pacific	5.4	7.7	5.8	5.9	5.0 to 6.0
Americas	5.9	3.7	2.9	3.7	3.5 to 4.5
Africa	-3.1	7.6	7.9	3.8	5.0 to 7.0
Middle East	2.0	-2.4	4.9	3.5	4.0 to 6.0

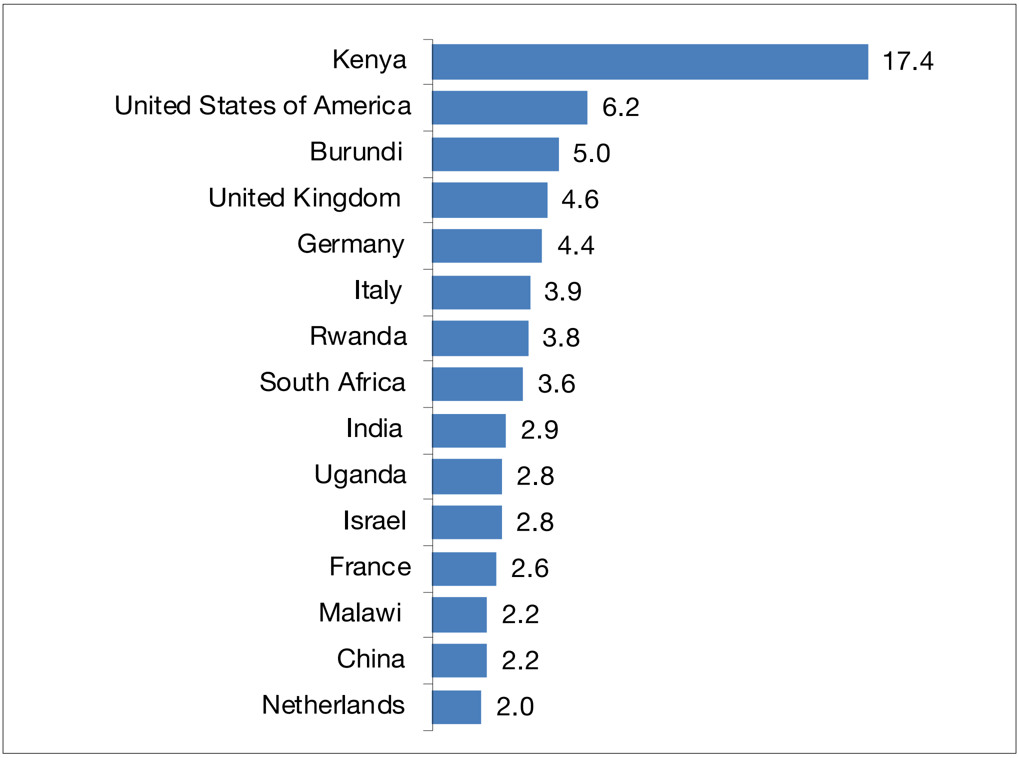
Source: UNWTO World Tourism Organization Barometer, Various issues

1.2 Tourism Developments in Tanzania

Tourism in Tanzania continued to play a significant role in the national economy as among the key sectors in generating foreign exchange. During the period under review, a number of activities were implemented to strengthen the sector. According to the immigration statistics, the top 15 source markets account for about 66 percent in which Kenya continues to be the main source market for tourists visiting Tanzania accounting for 17.4 percent of total international tourist arrivals followed by the United States of America, Burundi and the United Kingdom (**Chart 1.2**). The composition of the top 15 source markets is similar to that observed in 2016 with the exception of Malawi which has joined the list replacing Zambia. The appearance of Malawi reflects an increase in business interactions between these two countries.

Chart 1.2: International tourists arrivals to Tanzania, top 15 source markets, 2017

Percent



Source: Immigration Services Department, 2017

1.2.1 Meeting and Conference

1.2.1.1 The Fourth Diaspora Conference

Tanzania hosted the Fourth Annual Diaspora Homecoming Conference held in Sea Cliff Resort and Spa in Zanzibar from 23th to 24th August, 2017. The conference attracted about 350 participants, including Tanzanians living abroad, returning residents and stakeholders from public and private sectors. The theme of the conference was “Uzalendo kwa Maendeleo” (Patriotism for Development) with the aim of bringing together all Tanzanians living abroad to meet, exchange ideas and convince them to invest in their country for their own benefits and for the prosperity of their nation’s economy. Participants were involved in interactive discussions to explore ways and means to improve business and investment environment, which will attract more diaspora to come and invest in the country.

Hon. January Makamba during the opening ceremony of the fourth Diaspora Conference at Sea Cliff Resort and Spa, Zanzibar

1.2.1.2 Indian Ocean Rim Association Workshop

The Indian Ocean Rim Association (IORA) workshop on Sustainable Management and Development of Fisheries Resources in the Indian Ocean Rim Region was held in Zanzibar from 30-31 October 2017. The workshop aimed at developing fisheries resources and deep sea fishing as a way of increasing employment opportunities, increase awareness by sharing of knowledge and information regarding fisheries conservation and rational utilization of fisheries resources among the IORA Member States. This has come at a time when Zanzibar is diversifying its tourism products from traditional sun, sandy and sea package. Fishing and sea sport activities can be an important attractions and the business of freshly caught fish to coastal area. The Indian Ocean Rim Association is an international organization consisting 21 members states bordering the Indian ocean coast established in 1997, with the aim of promoting co-operation and closer interaction among the member states. Tourism promotion and culture exchanges are one among the six priorities areas identified by IORA.

Hon. Mahmoud Thabit Kombo during the opening ceremony of IORA workshop at Sea Cliff Resort and spa, Zanzibar.

1.2.2. Branding of Destination Tanzania

Tourism has become one of the world's fastest growing sectors in recent years. Governments worldwide are increasingly recognizing the power of tourism to boost their nation's economic development and prosperity. Competition for visitors has become even more intense. New destinations have emerged and countries are increasingly investing in tourism promotion. Recognizing this, the Government of Tanzania formulated National Branding Committee on December 10, 2017 to brand destination Tanzania1[1].The committee is tasked to conduct a comprehensive analysis on various studies and collect ideas from key stakeholders on how best to brand Tanzania. The Committee consists of 21 members from both sides of the Union.

1.2.3 Review of National Tourism Policy

The first National Tourism Policy was formulated in 1991 and was reviewed in 1999. Since last revision of the Tourism Policy (1999) there have been considerable changes on the political, economic, social, and technological fronts. Whilst overall goals of the policy remain valid, on the other side, the general tourism industry has become more competitive. To keep up with the changing pace the Government has initiated the process of reviewing the Tourism Policy (1999).

1.2.4 Refurbishment of Old Boma

Dar es Salaam City Council (DCC) in collaboration with the Architect Association of Tanzania (AAT) refurbished the Old Boma a historical building that was built in 1866-67, to become the one stop center for tourism and heritage. It's one of the pilot project funded by the European Union on the preservation and restoration of the old buildings for tourism purposes. The project is designed to promote city tourism and diversify tourism activities in Dar es Salaam by establishment of city museums, tourists information centre, upper class tourists' restaurant and other related services like curio shops. The Old Boma building aims at promoting historical architecture of Dar es Salaam and become the centre for education, professional trainings, community outreach and public cultural events. The refurbished Old Boma building was officially inaugurated on 30th June, 2017.

[1] Tanzania is known as the "*Land of Kilimanjaro, Zanzibar and the Serengeti*".

The Old Boma after refurbishment

1.2.5 The Swiss State Secretariat for Economic Affairs (SECO) Fund Project

The SECO Trust Fund is a bilateral Aid for Trade programme funded by the Swiss Government. It targets specific low income countries chosen by SECO. The Project is integrated into the Ministry of Industry, Trade and Investment's Trade Sector Development Programme and focuses on improving Tanzanian livelihoods through tourism. This involves improving linkages between horticultural producers and processors and the hotel industry as well as broader tourism sector market access issues.

1.2.6 Review of Regulation for Fees and Charges for Tourism Operators

The Government has reviewed the regulation for fees and charges in order to provide good environment for tourism business operators, where by fees and charges have been lowered to increase participation of local (Tanzanians) in tourism business. The fee has been reduced from USD 2000 to USD 500 for the tourism operator with one to three vehicles.

1.2.7 International Flights

Tourism and air transport industry complement each other. Tourism depends on transportation to bring visitors, while the transportation industry depends on tourism to generate demand for its services. In this context Latvia based airline Flyme has launched weekly flight between Latvia and Zanzibar. The Launching ceremony took place at Abeid Aman Karume Inernational Airport on 12th November 2017. The opening of new route to Zanzibar reflects the effort made by the country to increase the number of visitors from the emerging markets of Baltic Countries (Eastern Europe). Flyme with the capacity of 250 passengers will fly once a week from Riga- Latvia and serves the three Northern European countries of Estonia, Latvia and Lithunania.

Flyme Airline at AAKIA Zanzibar

Chapter 2: Analysis of the Surveys Results

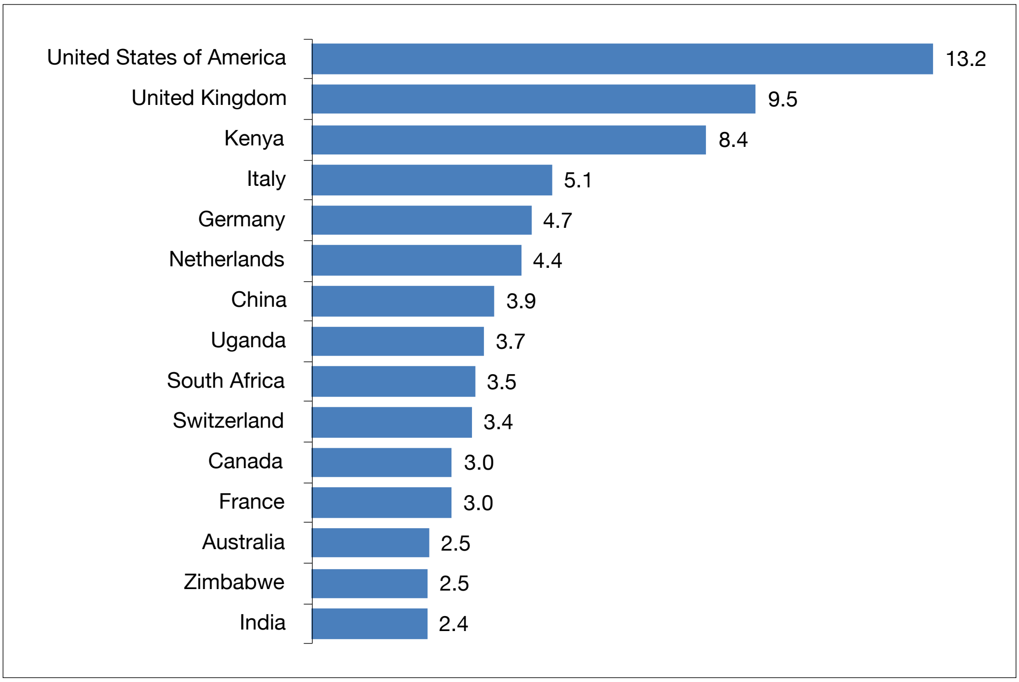
2.1 Introduction

This chapter presents key findings from the international visitors' exit survey conducted in 2017. Aspects covered include demographic characteristics of the visitors, purpose of visit and expenditure pattern. Other issues covered are the main tourism activities, visitors' impression and areas of improvements.

2.2 Source Markets

Chart 2.1 shows, the top 15 source markets in 2017 accounted for 73 percent of the total visitors covered during the survey. Majority of the visitors were from the United States of America accounting for 13.2 percent followed by the United Kingdom (9.5 percent) and Kenya (8.4 percent). The list of top 15 has new entrants, namely, India, Netherlands, and Switzerland, replacing Zambia, Spain, and Burundi which were in the top 15 source markets in 2016.

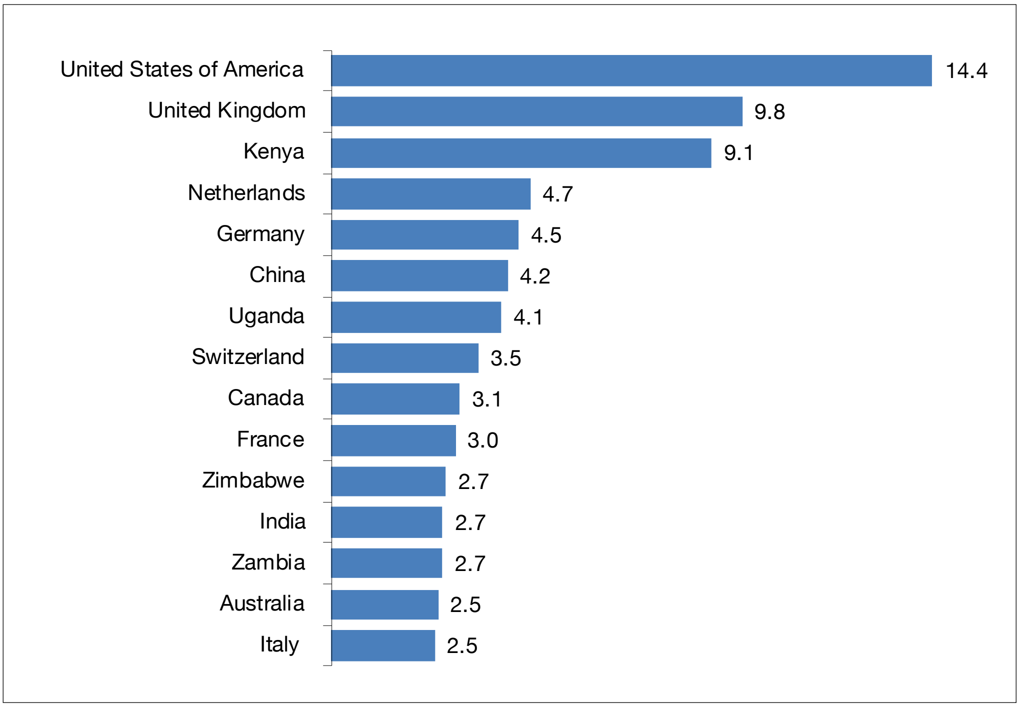
Chart 2.1: Top 15 source markets for the URT



In Tanzania Mainland, the top 15 source markets accounted for 73.3 percent of the total visitors interviewed led by the United States of America with 14.4 percent, followed by the United Kingdom and Kenya (**Chart 2.2**). Netherlands, Switzerland and India appeared in the top 15 source markets replacing Spain, Burundi and South Africa that appeared in 2016 top 15 source markets.

Chart 2.2: Top 15 source markets for Tanzania Mainland

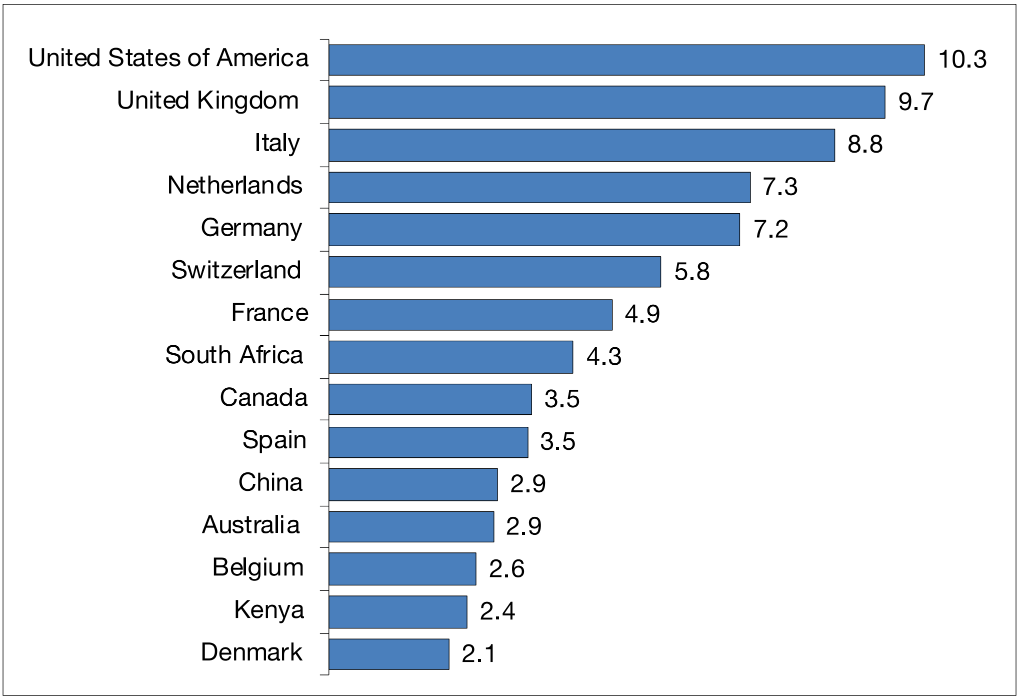
Percent



In Zanzibar**,** the top 15 source markets accounted for 78.1 percent of the total visitors, the leading source markets being the United States of America followed by the United Kingdom and Italy (**Chart 2.3**).

Chart 2.3: Top 15 source markets for Zanzibar

Percent

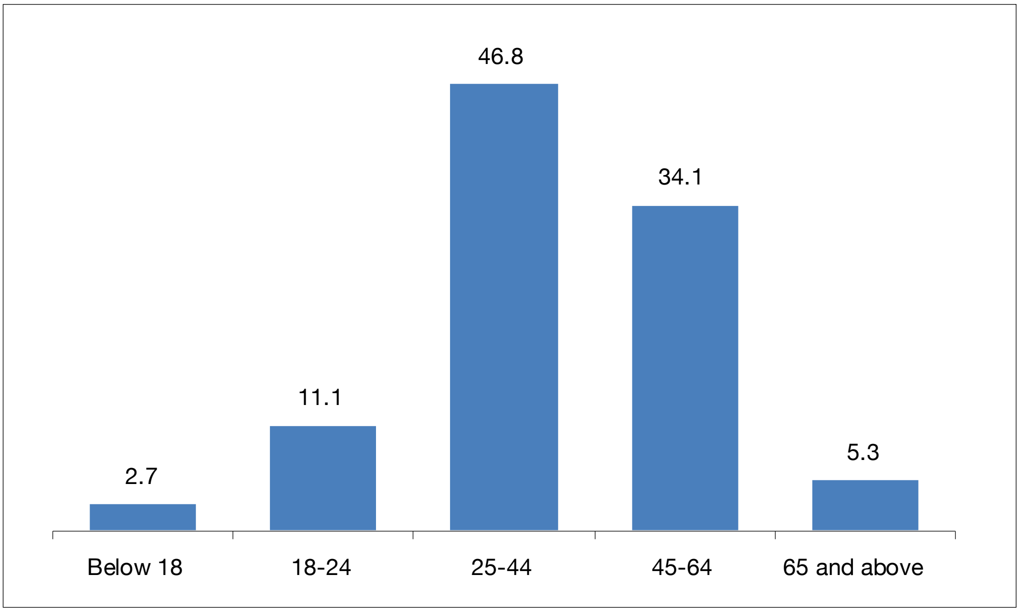


2.3 Age Group

The distribution of visitors by age group shows that visitors at the age group of 25-44 took the lead by accounting for 46.8 percent, followed by the age group 45-64 which accounted for 34.1 percent of the visitors. The senior visitors (65 and above) accounted for 5.3 and the least age group was visitors below 18 years as accounted for 2.7 percent (**Chart 2.4**). This pattern of age group distribution was also observed in the previous surveys.

Chart 2.4: Distribution of visitors by age group, URT

Percent



Majority of the visitors under the age group of 25-44 came from Kenya and the United State of America. Visitors at the age group of 45-64 mostly came from the United States of America and the United Kingdom. Those of the age group of 65 years and above mainly come from the United State of America and the United Kingdom.

Table 2.1: Distribution of top 15 source markets by age group, URT, 2017

Percent

Country of residence	Below 18	18-24	25-44	45-64	65 and above
United States of America	15.6	14.2	8.9	14.2	37.1
United Kingdom	18.1	9.2	7.0	9.0	10.5
Kenya	6.1	6.3	11.0	7.3	4.2
Netherland	10.7	5.2	2.0	5.2	2.1
Germany	4.5	4.8	4.1	5.8	3.8
Italy	3.2	5.3	5.8	5.3	2.6
Australia	1.2	1.4	1.9	3.3	9.6
China	4.7	3.2	4.4	3.5	1.6
Switzerland	3.9	4.0	2.6	4.4	1.3
Canada	3.0	3.0	2.4	3.7	4.2
France	3.9	2.9	2.9	2.9	1.0
South Africa	1.1	1.2	4.1	5.1	1.9
Uganda	1.0	2.3	5.8	2.8	1.0
India	1.1	1.3	3.0	2.9	2.0
Zimbabwe	0.3	2.0	4.2	1.4	0.3
Others	21.5	33.6	29.9	23.3	16.6
Total	100	100	100	100	100
Number of visitors	**2,763**	**2,998**	**8,751**	**5,486**	**977**

Similar to the previous surveys, visitors under all age groups mainly came for leisure and holidays, visiting friends and relatives as well as business activities (**Table 2.2**).

Table 2.2: Age Group and purpose of visit, URT

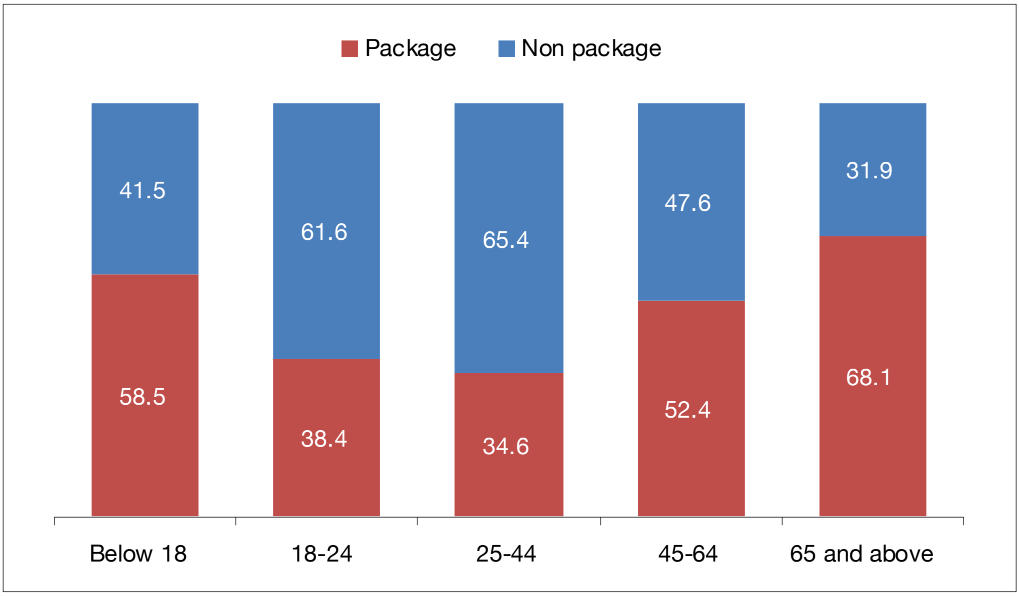
Percent

Age group	Purpose of Visit								Total
	Leisure and holidays	Visiting friends and relatives	Business	Meetings and conference	Volunteering	Scientific and academic	Religion	Other	
Below 18	58.8	18.0	0.5	0.2	16.2	-	0.9	5.4	100
18-24	52.2	19.4	4.5	11.0	7.3	3.4	0.2	2.0	100
25-44	57.8	17.0	12.2	6.8	1.1	1.0	1.1	3.2	100
45-64	70.9	12.9	7.1	5.2	1.4	0.7	0.4	1.5	100
65 and above	80.5	10.6	1.5	3.5	1.6	0.4	0.5	1.5	100
Total	64.4	15.9	8.8	6.5	2.4	1.2	0.7	2.5	100

In terms of tour arrangements, the majority of visitors in the age group 25-44 and 18-24 came under the non package tour arrangement, while those in the age group of below 18 years and 65 years and above preferred package tour arrangement. Higher preference for package tour arrangement for visitors in the age group of 65 years and above is largely associated with convenience at destination.

Chart 2.5: Tour arrangement by age group, URT

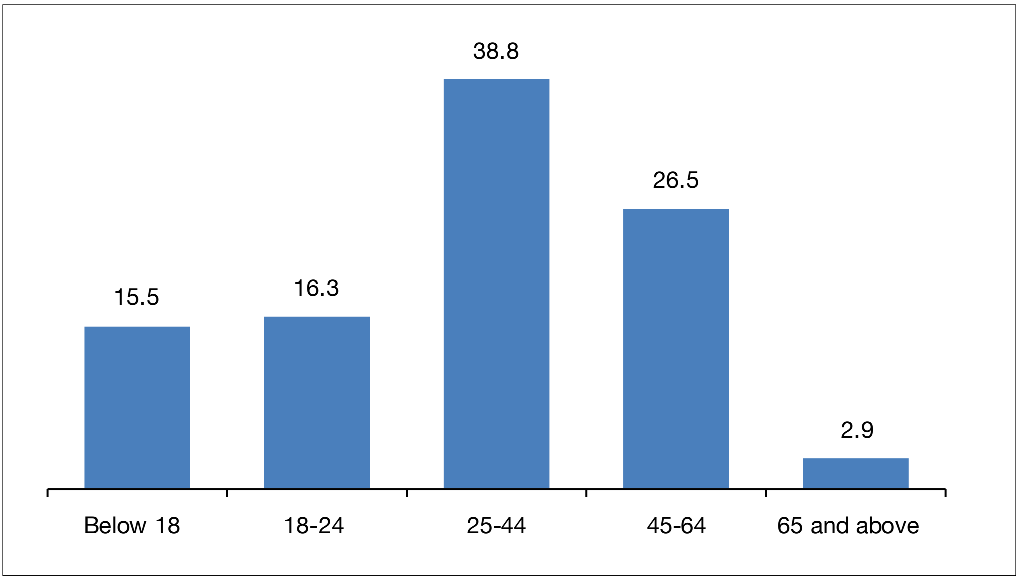
Percent



In Zanzibar, most visitors were in the age group of 25-44, accounting for 38.8 percent of all visitors, followed by the age group of 45-64, which accounted for 26.5 percent. The age group of below 18 years and 65 years and above were the least groups accounting for 15.5 and 2.9 percent, respectively (**Chart 2.6**).

Chart 2.6: Distribution of visitors by age group, Zanzibar

Percent



Similar to the previous surveys, majority of visitors under all age group in Zanzibar came for leisure and holidays (**Table 2.3**).

Table 2.3: Age group and purpose of visit, Zanzibar

Percent

Age group	Purpose of visit								Total
	Leisure and holidays	Visiting friends and relatives	Business	Meetings and conference	Volunteering	Scientific and academic	Religion	Other	
Below 18	88.4	8.5	0.3	0.2	2.1	0.3	0.0	0.2	100
18-24	75.5	7.8	1.3	7.8	5.0	2.1	0.2	0.3	100
25-44	85.5	8.2	1.7	3.1	0.8	0.4	0.0	0.4	100
45-64	90.1	5.5	1.0	1.9	0.6	0.2	0.0	0.6	100
65 and above	89.5	8.4	0.4	0.7	0.4	0.4	0.0	0.4	100
Total	85.7	7.4	1.2	3.0	1.6	0.6	0.0	0.4	100

The top 15 source markets in Zanzibar indicates that, visitors from the United States of America and the United Kingdom were dominant except for the age group below 18 years were the majority came from Netherlands (**Table 2.4**).

Table 2.4: Distribution of top 15 source markets by age group, Zanzibar, 2017

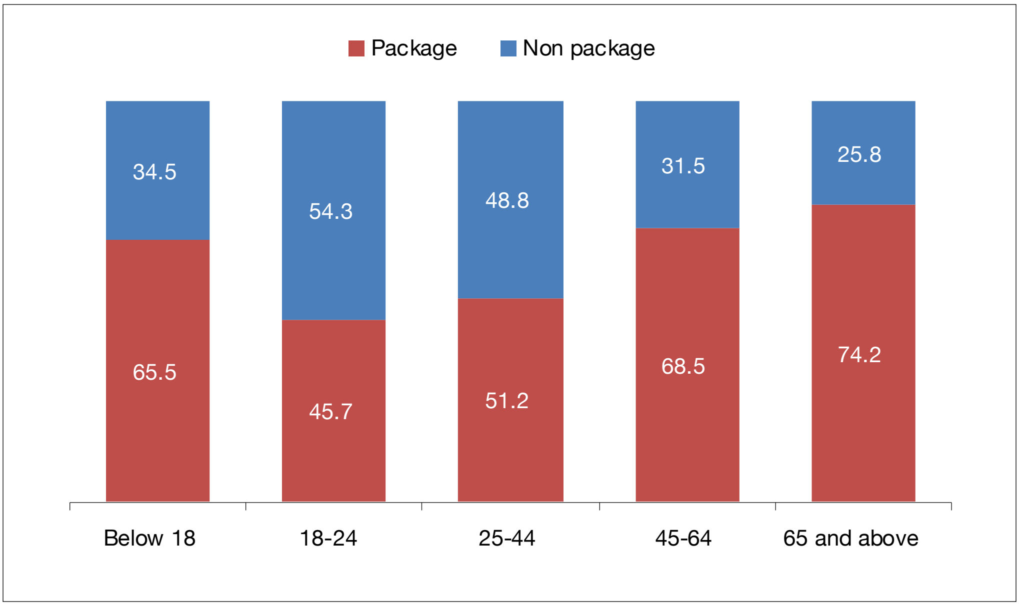
Percent

Country of residence	Below 18	18-24	25-44	45-64	65 and above
United States of America	9.8	11.0	9.3	9.7	29.8
United Kingdom	13.1	8.4	8.3	10.2	11.6
Italy	5.1	7.9	11.2	8.5	3.6
Netherlands	16.5	7.0	3.3	8.2	4.7
Germany	6.2	5.8	7.6	8.2	4.4
Switzerland	6.1	5.4	5.1	7.1	3.6
France	6.3	4.0	5.1	4.7	2.5
South Africa	1.4	1.8	5.0	6.5	2.9
Canada	2.2	2.5	3.4	4.5	8.7
Spain	1.2	1.6	5.5	3.2	1.8
China	4.0	3.0	3.5	1.7	0.0
Australia	1.8	1.6	2.4	4.2	10.2
Belgium	4.0	2.7	1.9	2.6	3.3
Kenya	2.7	2.3	2.7	2.0	0.4
Denmark	1.9	3.7	1.7	1.9	0.7
Others	17.7	31.3	24.1	16.7	11.6
Total	100	100	100	100	100
Number of visitors	1,466	1,548	3,673	2,515	275

In terms of tour arrangement in Zanzibar, the majority of visitors in all age groups preferred package tour arrangement except visitors with the age group 18 – 24 years where the majority prefers the non-package tour arrangements (**Chart 2.7**).

Chart 2.7: Tour arrangement by age group, Zanzibar

Percent

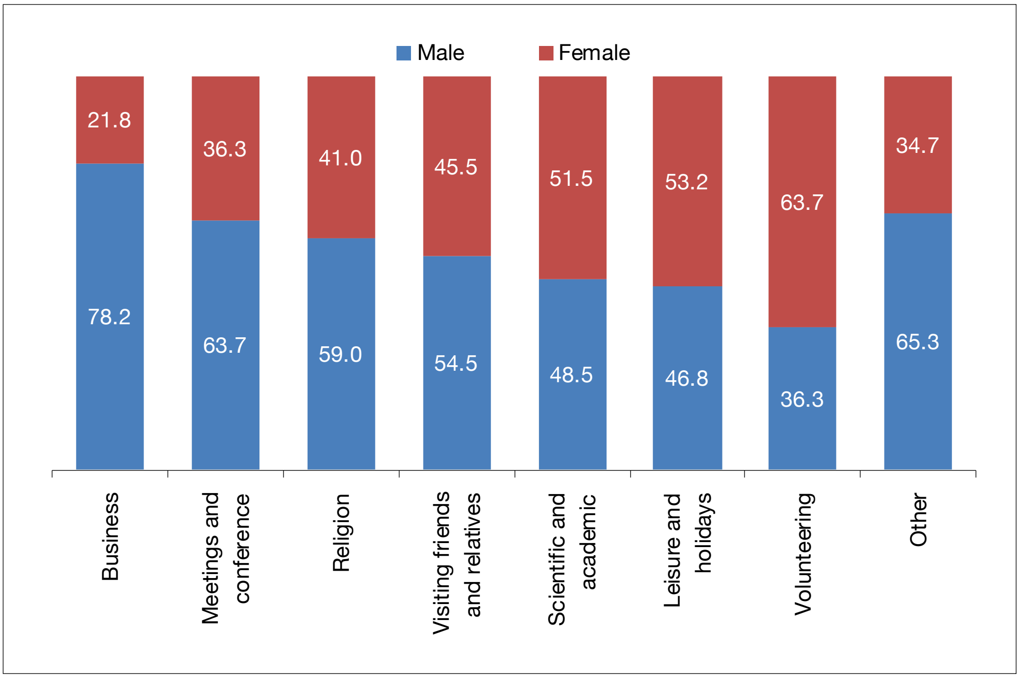


2.4 Gender

Survey results indicate that 52.1 percent of visitors to the United Republic of Tanzania were male, while 47.9 percent were female. In terms of purpose of visit, male visitors dominated in business, meeting and conference as well as visiting friends and relatives, while female visitors favored volunteering, leisure and holidays; and scientific and academic (**Chart 2.8**).

Chart 2.8: Gender by purpose of visit, URT

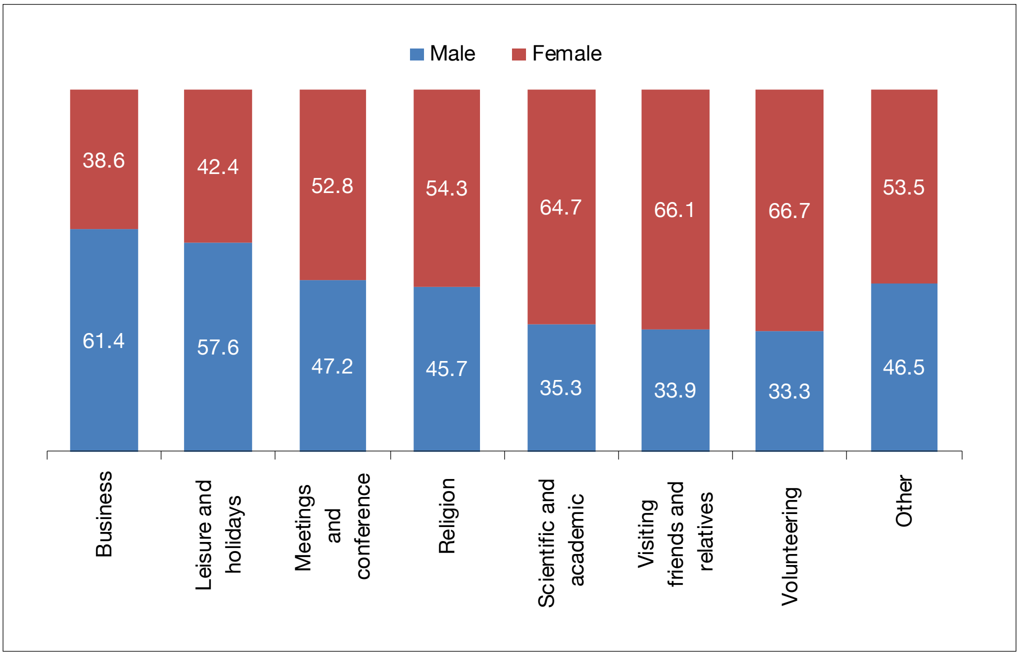
Percent



In the case of Zanzibar, 53.9 percent of visitors were male while 46.1 percent were females. Majority of male visitors to Zanzibar came for business, leisure and holidays, while female visitors preferred most volunteering and visiting friends and relatives (**Chart 2.9**).

Chart 2.9: Gender by purpose of visit, Zanzibar

Percent

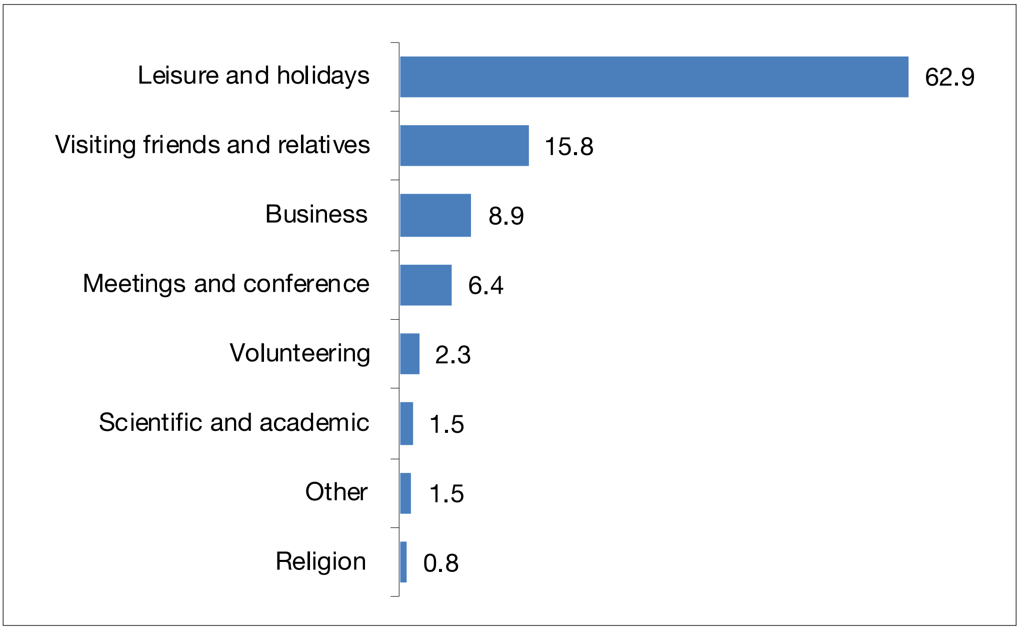


2.5 Purpose of Visit

The survey results indicate that the majority of visitors came to Tanzania for leisure and holidays followed by those who came to visit friends and relatives, business; and meetings and conference (**Chart 2.10**). The same pattern was observed in the previous surveys. The dominance of visitors who came for leisure and holidays in Tanzania is largely attributed to the country's unique nature and wide range of choices of tourist attractions such as wildlife, sandy beaches and historical sites and mountains climbing.

Chart 2.10: Purpose of visit, URT

Percent



The majority of visitors from the top 15 source markets to the United Republic of Tanzania who came for leisure and holidays were from the United States of America and the United Kingdom. Visitors who came to visit friends and relatives were mainly from Kenya and the United States of America. Visitors from Kenya, Uganda and South Africa mostly came for business purpose (**Table 2.5**).

Table 2.5: Distribution of top 15 source markets by purpose of visit, URT

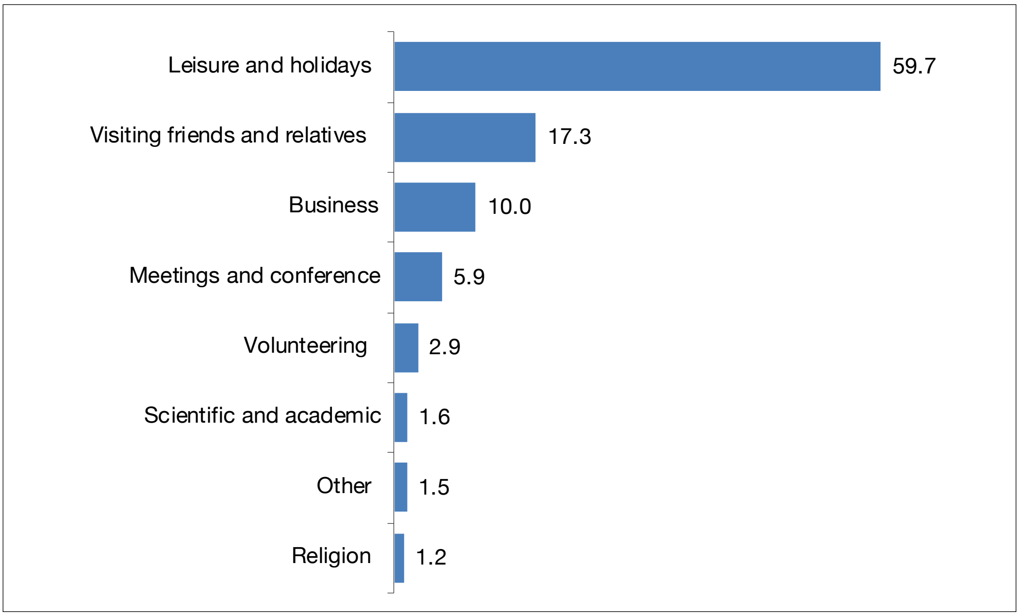
Percent

Country of residence	Business	Leisure and holidays	Meetings and conference	Other	Religion	Scientific and academic	Visiting friends and relatives	Volunteering	Total
United States of America	3.7	14.7	9.4	14.0	23.4	17.6	11.0	29.8	13.2
United Kingdom	4.1	10.7	4.8	0.6	1.2	15.7	8.2	22.3	9.5
Kenya	9.0	3.7	16.6	15.3	46.7	9.6	21.7	1.2	8.4
Italy	1.4	7.2	0.7	0.0	5.4	0.6	1.4	5.4	5.1
Germany	0.9	5.8	1.6	0.3	0.0	1.6	4.3	4.5	4.7
Netherlands	0.5	6.1	1.0	0.0	0.0	7.1	1.5	5.2	4.4
China	2.0	5.1	2.8	1.3	0.0	1.0	1.7	1.7	3.9
Uganda	8.6	0.6	6.9	25.6	12.6	13.5	8.9	0.4	3.7
South Africa	5.9	3.3	8.7	2.6	1.2	1.9	1.6	0.2	3.5
Switzerland	0.5	4.9	0.9	0.0	0.0	0.3	1.1	1.0	3.4
Canada	0.6	3.0	1.8	0.0	0.0	0.6	4.7	7.4	3.0
France	0.4	4.2	0.7	0.0	0.0	0.3	1.1	1.0	3.0
Australia	0.5	3.5	0.8	0.3	0.6	0.3	0.7	1.9	2.5
Zimbabwe	16.3	0.5	6.9	0.6	1.8	0.3	1.4	0.2	2.5
India	6.2	1.6	4.2	0.6	1.8	1.3	3.6	0.0	2.4
Other	39.4	25.0	32.3	38.6	5.4	28.2	27.0	17.8	27.0
Total	100	100	100	100	100	100	100	100	100

Most of the visitors to Tanzania Mainland came for leisure and holidays, followed by those who came to visit friends and relatives. This is similar to that of URT with slight changes in dominance (**Chart 2.11**)

Chart 2.11: Purpose of visit Tanzania Mainland

Percent



In Tanzania Mainland, majority of visitors who came for leisure and holidays were from the United States of America and the United Kingdom, while those who came to visit friends and relatives were mainly from Kenya and the United States of America (**Table 2.6**).

Table 2.6: Distribution of top 15 source markets by purpose of visit, Tanzania Mainland

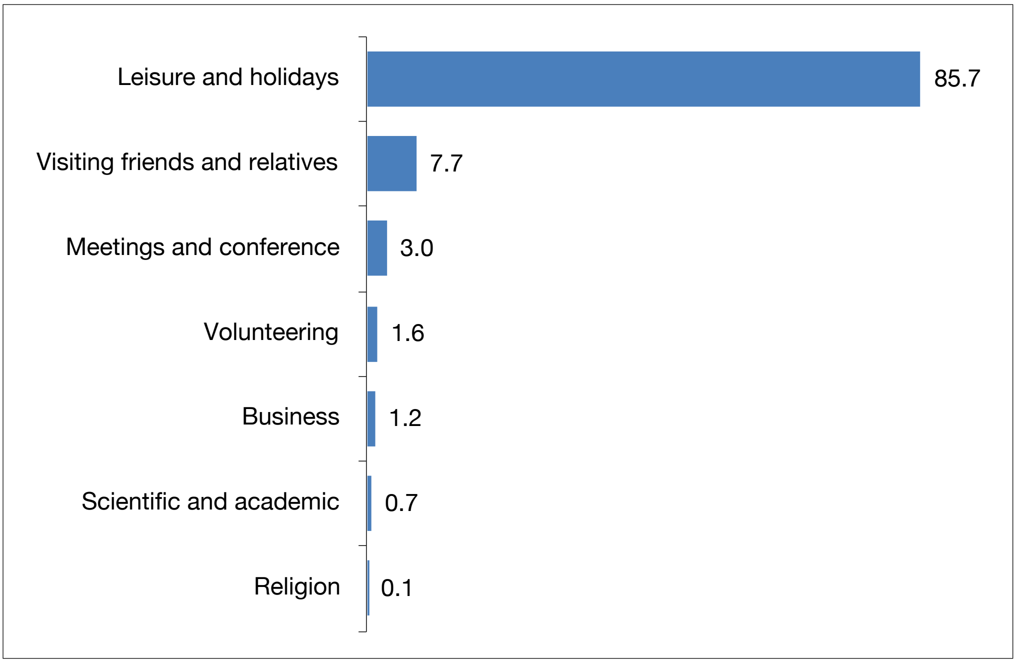
Percent

	Purpose of visit								
Country of residence	**Business**	**Leisure and holidays**	**Meetings and conference**	**Other**	**Religion**	**Scientific and academic**	**Visiting friends and relatives**	**Volunteering**	**Total**
United States of America	3.7	16.7	9.5	14.0	23.4	17.5	11.3	30.8	14.4
United Kingdom	4.1	11.4	4.9	0.7	1.2	16.2	8.3	23.1	9.8
Kenya	9.2	3.9	16.6	15.3	46.7	9.9	22.2	0.9	9.1
Netherlands	0.6	7.0	1.0	0.0	0.0	6.6	1.5	5.4	4.7
Germany	0.9	5.8	1.6	0.3	0.0	1.7	3.9	4.5	4.5
China	2.0	5.8	2.7	1.3	0.0	0.7	1.7	1.7	4.2
Uganda	8.7	0.6	6.9	25.7	12.6	13.9	9.2	0.4	4.1
Switzerland	0.5	5.4	0.8	0.0	0.0	0.3	1.1	0.9	3.5
Canada	0.6	3.1	1.8	0.0	0.0	0.7	4.8	7.7	3.1
France	0.4	4.6	0.8	0.0	0.0	0.3	0.7	1.1	3.0
Zimbabwe	16.5	0.6	7.0	0.3	1.8	0.3	1.4	0.2	2.7
India	6.4	1.7	4.3	0.7	1.8	1.3	3.8	0.0	2.7
Zambia	19.5	0.2	1.2	9.1	2.4	1.7	1.7	0.2	2.7
Australia	0.5	3.8	0.7	0.3	0.6	0.3	0.7	1.5	2.5
Italy	0.7	3.4	0.6	0.0	5.4	0.0	1.1	5.1	2.5
Other	25.7	25.9	39.4	32.2	4.2	28.7	26.4	16.5	26.7
Total	100	100	100	100	100	100	100	100	100

In Zanzibar, leisure and holidays was the leading purpose of visit, followed by visiting friends and relatives (**Chart 2.12**). Majority of visitors who came for leisure and holidays were from Italy, the United States of America and the United Kingdom while those who came to visit friends and relatives were from the United States of America and the United Kingdom (**Table 2.7**).

Chart 2.12: Purpose of visit Zanzibar, 2017

Percent



The majority of visitors who came for leisure and holidays and visiting friends and relatives in Zanzibar were from the United States of America and the United Kingdom (**Table 2.7**). On the hand, under the business category, the majority of visitors were from the United States of America, the United Kingdom and South Africa.

Table 2.7: Distribution of top 15 source markets by purpose of visit, Zanzibar

Percent

Country of residence	Purpose of visit								Total
	Business	Leisure and holidays	Meetings and conference	Other	Religion	Scientific and academic	Visiting friends and relatives	Volunteering	
United States of America	16.1	9.5	0.0	0.0	100	33.3	14.9	13.1	10.3
United Kingdom	11.9	9.4	0.7	0.0	0.0	4.8	13.1	19.6	9.7
Italy	13.6	9.7	5.2	0.0	0.0	3.2	2.6	2.6	8.8
Netherlands	4.2	7.8	1.4	0.0	0.0	4.8	3.4	14.4	7.3
Germany	4.2	7.4	3.1	33.3	0.0	0.0	6.6	9.2	7.2
Switzerland	2.5	6.5	1.4	0.0	0.0	0.0	1.9	2.0	5.8
South Africa	10.2	4.4	5.2	0.0	0.0	1.6	1.4	0.0	4.3
Canada	0.8	3.0	1.0	0.0	0.0	3.2	10.3	5.9	3.5
Spain	0.0	3.8	8.3	33.3	0.0	0.0	1.0	6.5	3.5
China	0.0	2.9	0.3	0.0	0.0	3.2	2.3	3.3	2.9
Australia	0.8	3.2	0.3	0.0	0.0	0.0	0.4	1.3	2.9
Belgium	0.0	2.9	0.3	0.0	0.0	1.6	0.0	4.6	2.6
Kenya	3.4	1.9	3.1	0.0	0.0	0.0	7.3	2.0	2.4
Denmark	0.0	2.3	12.8	0.0	0.0	0.0	0.7	1.3	2.1
Uganda	2.5	0.4	55.2	0.0	0.0	0.0	1.0	0.0	0.4
Other	29.7	24.9	1.4	33.3	0.0	44.4	33.0	14.4	26.4
Total	100	100	100	100	100	100	100	100	100

2.6 Travel Arrangement

The survey findings depict that 55.5 percent of visitors to URT preferred non-package tour arrangement. This pattern has been observed in the last three consecutive years surveys (**Chart 2.13**). The dominance of the non package tour is partly explained by an increase in the number of visitors from neighboring countries, such as Kenya, Uganda and Zimbabwe who mainly came for business, religion and visiting friends and relatives. Those who came under the package tour were mainly from the United States of America, the United Kingdom and Italy (**Chart 2.14**).

Chart 2.13: Visitors by tour arrangement, URT

Percent

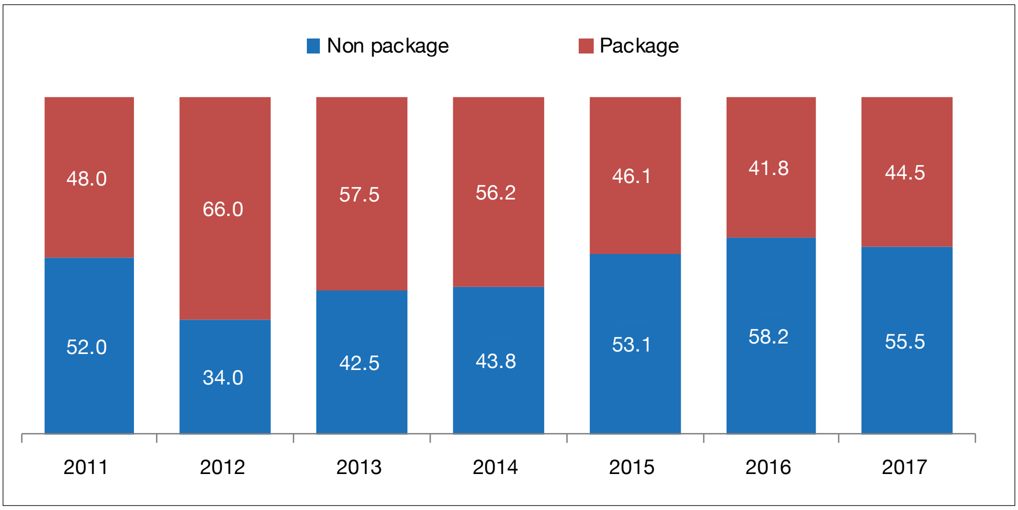
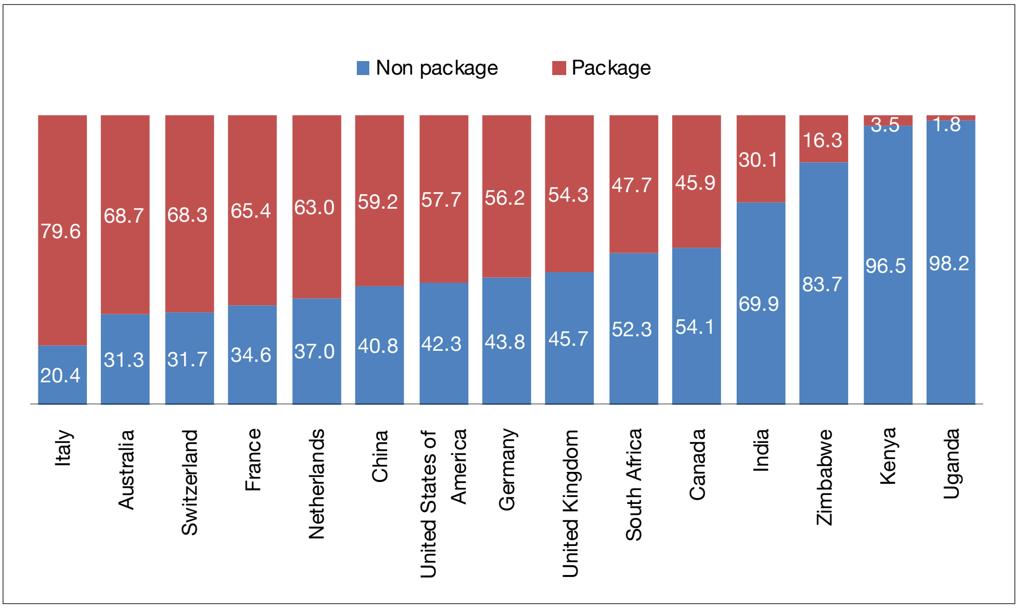


Chart 2.14: Proportion of visitors of Top 15 source markets by travel arrangement, URT

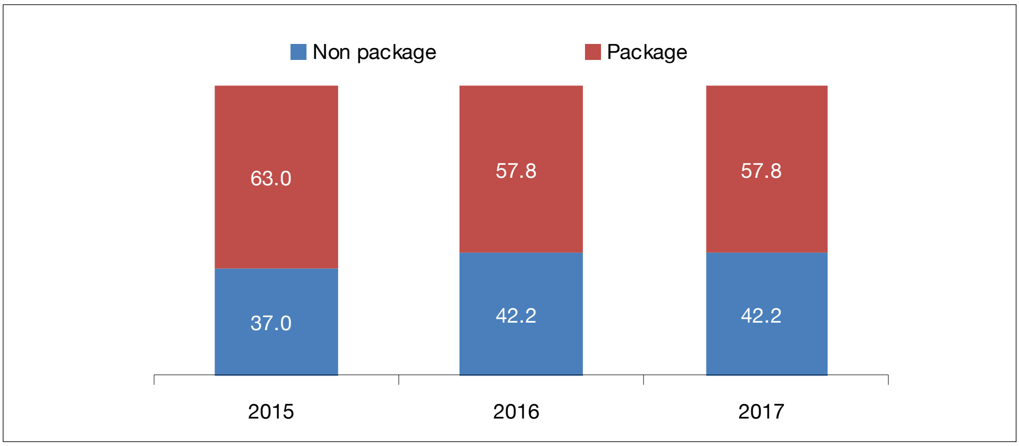
Percent



In the case of Zanzibar, 57.8 percent of visitors used package tour arrangement. Similar pattern was observed in the previous survey conducted in 2016 (**Chart 2.15**).

Chart 2.15: Visitors by tour arrangement, Zanzibar

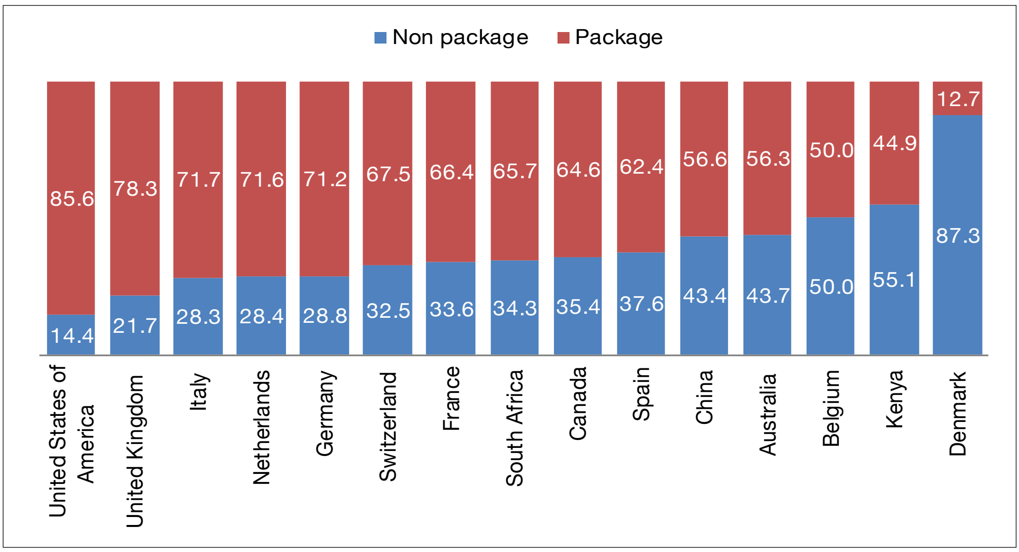
Percent



Visitors who preferred package tour came from Italy, the United States of America and the United Kingdom and mainly came for leisure and holidays. However, those who came under the non package arrangement were mainly from the United States of America, The United Kingdom and Germany. Similar to the case of URT, most visitors to Zanzibar who preferred the package tour arrangement mainly came for leisure and holidays (**Chart 2.16**).

Chart 2.16: Top 15 source markets by travel arrangement Zanzibar, 2017

Percent

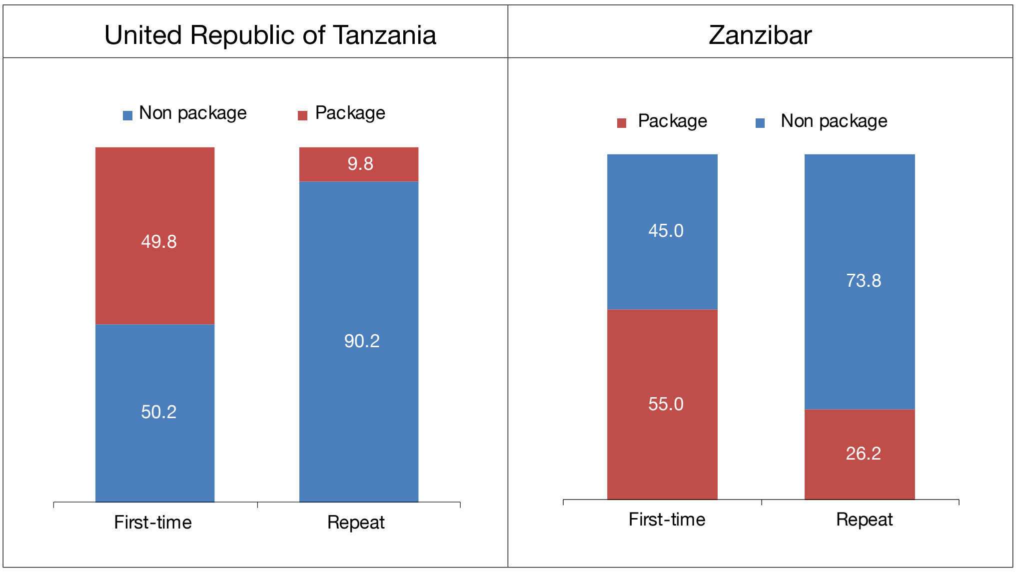


2.7 First-Time and Repeat Visit

The survey findings revealed that 59.3 percent of the interviewed visitors came to Tanzania for the first-time, while 40.3 percent were repeat visitors. These results are similar to that of 2016. When looking at the first time visitors by tour arrangement, the distribution is almost the same, unlike repeat visitors whereby 90.2 percent of interviewed visitors came under the non-package tour arrangement and 9.8 percent under the package tour arrangement (**Chart 2.17**). The preference of the non-package tour arrangement by majority of repeat visitors is not peculiar given their familiarity to the destination. Similar observation was experienced in Zanzibar for both first-time and repeat visitors.

Chart 2.17: First-time and repeat visitors by tour arrangements, URT

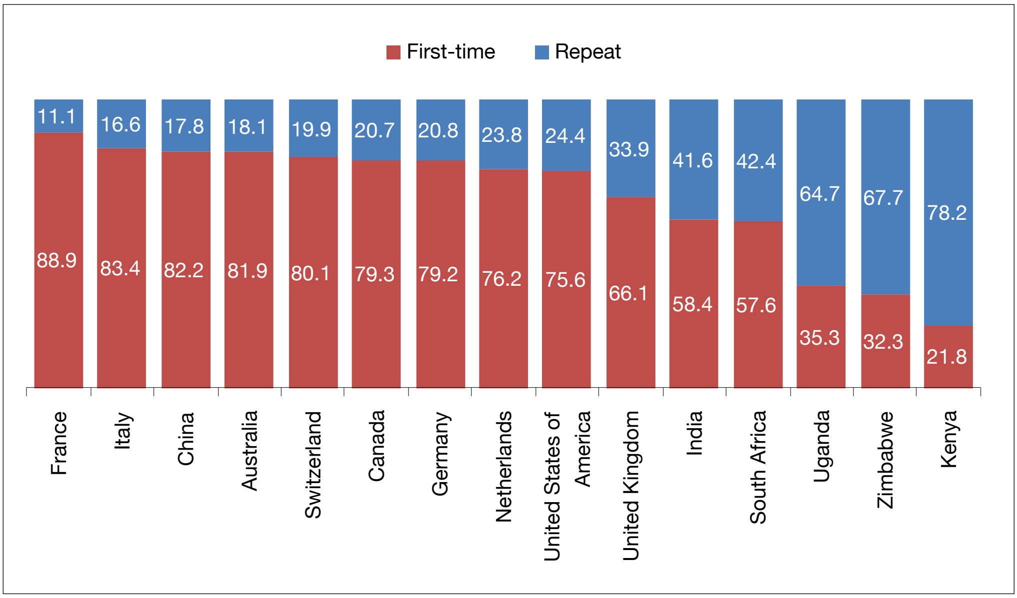
Percent



With the exception of Uganda, Zimbabwe and Kenya, majority of visitors from the top 15 source markets were first-time visitors (**Chart 2.18**). Neighboring countries attracted more repeat visitors, which is consistent with the existing cultural and regional relations.

Chart 2:18: First-time and repeat visitors by source markets, URT

Percent



Majority of first time visitors came for leisure and holidays, while repeat visitors mostly came for visiting friends and relatives (**Table 2.8**).

Table 2.8: First-time and repeat visitors by purpose of visit, URT

Percent

Purpose of visit	First-time visitors	Repeat visitors
Leisure and holidays	68.4	24.0
Visiting friends and relatives	10.0	32.3
Meetings and conference	7.7	11.9
Business	7.0	24.1
Volunteering	3.2	1.2
Other	1.8	4.4
Scientific and academic	1.5	1.3
Religion	0.5	0.8
Total	100	100

For the case of Zanzibar, majority of top 15 source markets were first time visitors with the exception of Kenya (**Chart 2.19**). The main purpose of visit of first-time visitors was leisure and holidays (**Table 2.9**).

Chart 2.19: First-time and repeat visitors by top 15 source markets, Zanzibar

Percent

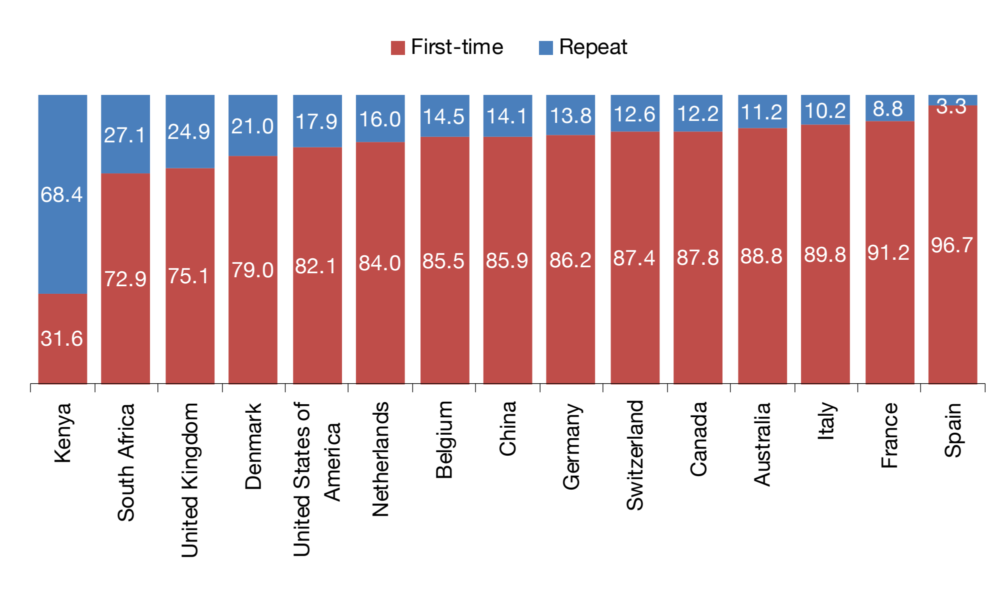


Table 2.9: First-time and repeat visitors by purpose of visit, Zanzibar

Percent

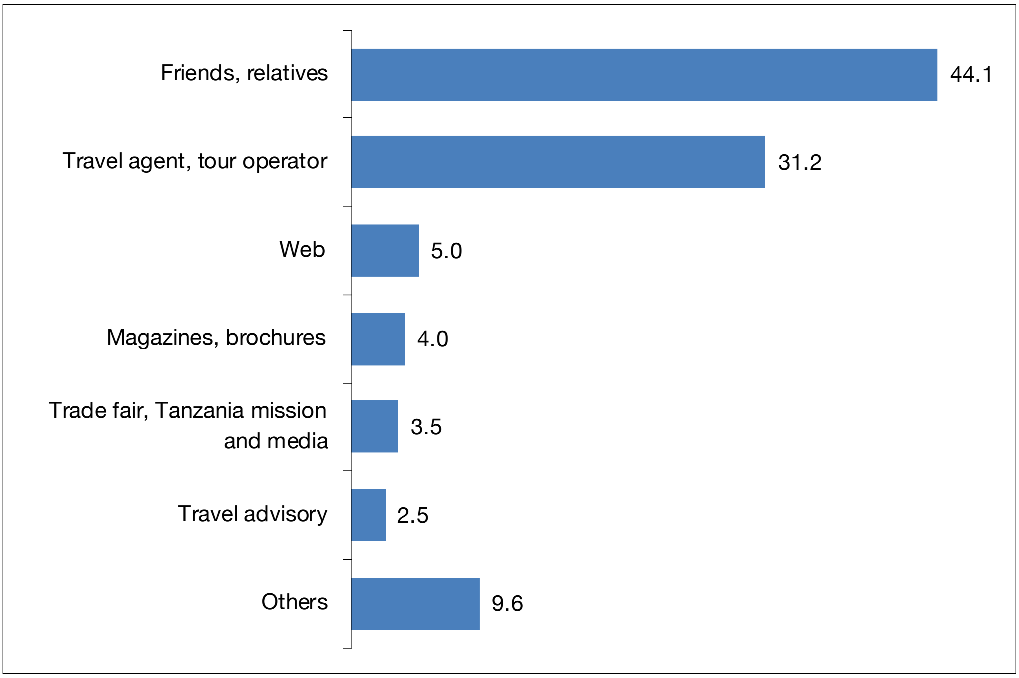
Purpose of visit	First-time visitors	Repeat visitors
Leisure and holidays	86.8	66.7
Visiting friends and relatives	5.3	22.7
Meetings and conference	2.8	3.7
Volunteering	2.7	0.3
Business	1.4	5.9
Scientific and academic	0.8	0.5
Other	0.2	0.0
Religion	0.0	0.3
Total	100	100

2.8 Source of Information

Friends and relatives continue to be an important source of information about destination Tanzania as 44.1 percent of respondents heard about Tanzania from friends and relatives. The second most important source of information was travel agent and tour operator. Visitors whose main source of information was friends and relatives mainly came from Kenya, the United States of America, and Uganda. Meanwhile, those whose main source of information was travel agents and tour operators were from the United States of America, the United Kingdom and Italy (**Chart 2.20**).

Chart 2.20: Source of information

Percent



2.9 Travel Party

The findings depict that in URT, visitors who travelled alone took the lead followed by those who travelled with other friends and relatives (**Chart 2.21**). Majority of visitors who travelled alone and with friends and relatives were in the age group 25-44 (**Table 2.10**).

Chart 2.21: Travel party, URT

Percent

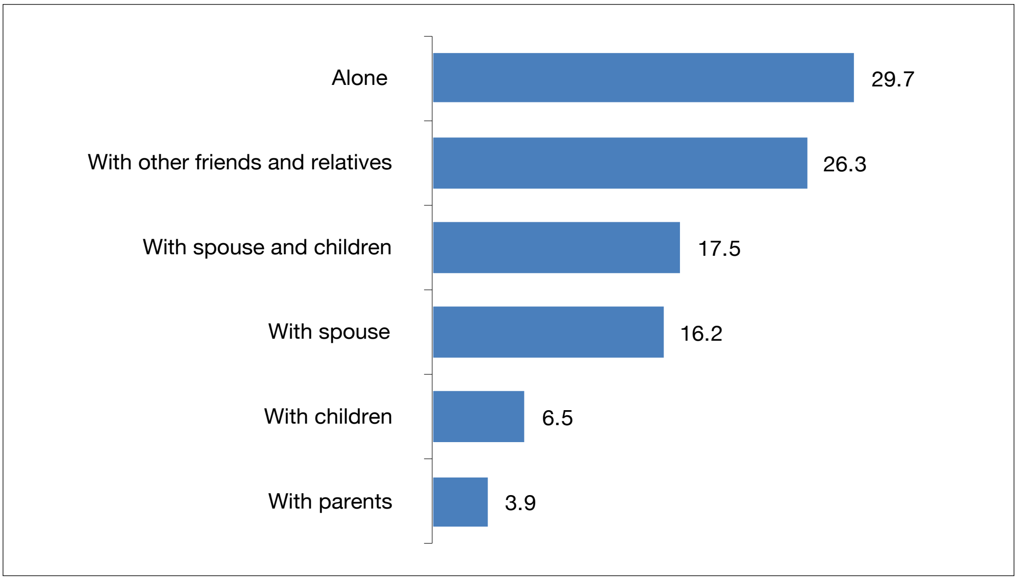


Table 2.10: Travel party by age group, URT

Percent

Travel party	Age group <18	18-24	25-44	45-64	65+	Total visitors	% of the total
Alone	27.4	39.8	34.4	21.0	24.2	6,229	29.7
With other friends and relatives	43.8	36.8	27.9	20.7	17.7	5,518	26.3
With spouse and children	0.0	2.1	12.3	31.9	10.9	3,663	17.5
With spouse	1.1	6.1	17.5	15.3	39.3	3,399	16.2
With children	0.0	2.1	5.0	10.2	7.2	1,358	6.5
With parents	27.8	13.1	2.9	0.9	0.6	811	3.9
Total	100	100	100	100	100	20,977	100

Similar pattern was observed inTanzania Mainland (**Table 2.11**).

Table 2.11: Travel party by age group, Tanzania Mainland

Percent

Travel party	Age group					Total visitors	Total
	<18	18-24	25-44	45-64	65+		
Alone	30.0	43.3	38.5	22.8	25.1	6,015	32.6
With other friends and relatives	45.3	34.9	27.5	20.0	17.2	4,731	25.6
With spouse and children	0.0	2.2	11.7	32.1	10.7	3,193	17.3
With spouse	1.2	4.5	14.3	13.9	39.5	2,614	14.2
With children	0.0	2.2	5.2	10.4	6.9	1,224	6.6
With parents	23.5	13.0	2.7	0.8	0.7	674	3.7
Total	100	100	100	100	100	18,451	100

In Zanzibar most of the visitors came with other friends and relatives, followed by those who travelled with spouse and children (**Chart 2.22**). Visitors traveling with friends and relatives were mainly in the age group of 25 – 44 while those travelling with spouse and children were mainly in the age groups of 45 – 64 and below 18 years (**Table 2.12**).

Chart 2.22: Travel party, Zanzibar

Percent

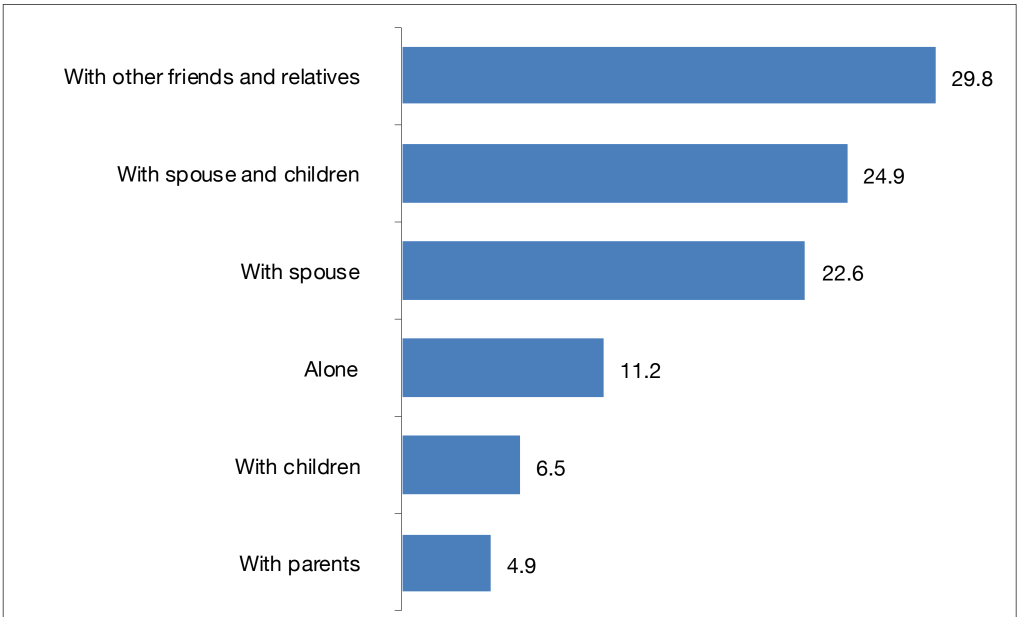


Table 2.12: Travel party and age group, Zanzibar

Percent

Travel party	Age group					Total visitors	Grand total
	<18	18-24	25-44	45-64	65+		
With other friends and relatives	46.5	46.0	31.8	21.3	28.7	2,828	29.8
With spouse and children	0.0	2.2	17.9	43.9	8.2	2,359	24.9
With spouse	0.0	9.6	30.3	16.8	42.9	2,141	22.6
Alone	4.2	25.3	12.9	5.1	10.0	1,065	11.2
With children	0.0	1.6	3.6	11.8	10.3	620	6.5
With parents	49.3	15.3	3.5	0.9	0.0	464	4.9
Total	100	100	100	100	100	9,477	100

2.10 Departure Points

The 2017 survey covered eight departure points; three airports and five border posts. Most of the visitors departed through airports which is explained by the fact that most visitors to Tanzania are from long-haul destinations. On the other hand, the leading land border posts were Namanga, Mtukula and Horohoro (**Table 2.13**).

Table 2.13: The number of visitors by departure points, URT

Percent

Departure points	Number of visitors	% of the total
Julius Nyerere International Airport (JNIA)	9,668	46.1
Abeid Aman Karume International Airport (AAKIA)	4,166	19.9
Kilimanjaro International Airport (KIA)	2,661	12.7
Namanga (NAM)	1,450	6.9
Mutukula (MTK)	898	4.3
Horohoro (HOR)	840	4.0
Tunduma (TUN)	838	4.0
Manyovu (MNY)	457	2.2
Total	20,977	100

Majority of visitors departed through JNIA since it is the departure point for most international airlines and a commercial hub for Tanzania. Furthermore, JNIA is the leading departure point for all purposes of visit. AAKIA was the second largest departure point mostly used by visitors who came for leisure and holidays. This is associated with availability and connectivity of many international airlines and existence of diversity of tourist attractions such as sandy beaches and historical sites.

2.11 Nights Spent

Length of stay as measured by the number of nights spent by tourists in the destination is an important indicator in estimating tourism earnings in the country. **Chart 2.23** indicates that about one-third of the visitors who came to the URT spent 8 to 14 nights, followed by visitors who spent 4 to 7 nights accounting for 27.9 percent. Smallest proportion of visitors of less than ten percent spent more than 29 nights.

Chart 2.23: Distribution of visitors by nights spent, URT

Percent

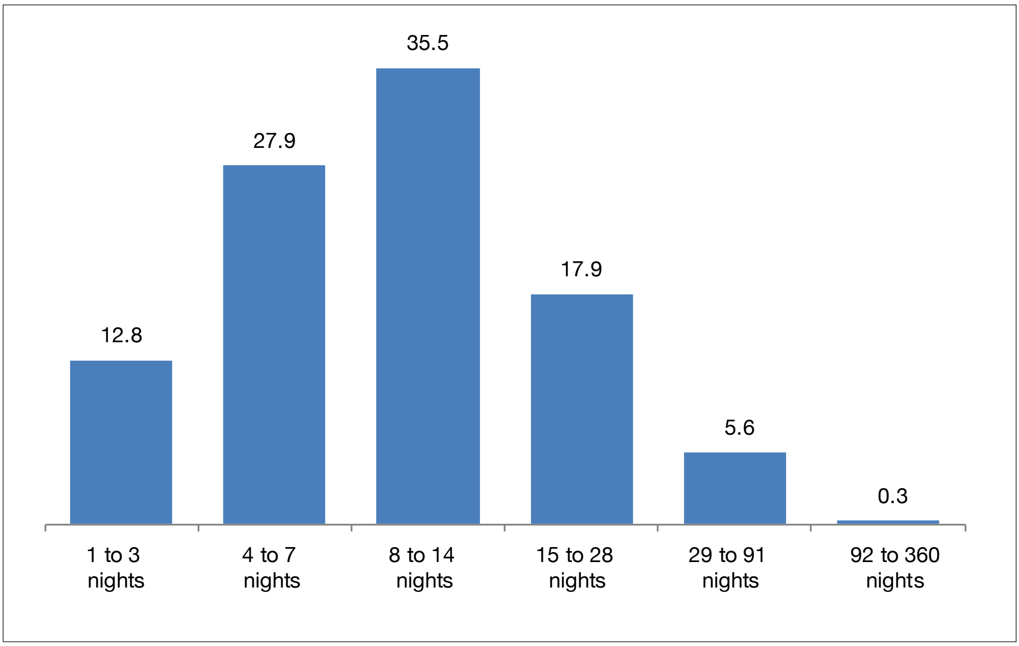


Table 2.14 indicates that about 44 percent of visitors to URT who came for leisure and holidays spent between 8 to 14 nights while 40.4 percent of business visitors,spent 1 to 3 nights. Nearly 50 percent of visitors who came for religious activities stayed for 1 to 3 nights. Similar pattern was observed in Tanzania Mainland.

Table 2.14: Distribution of visitors by the nights spent and purpose of visit, URT

Percent

Nights spent	Leisure and Holidays	Visiting friends and relatives	Business	Meetings and conference	Scientific and academic	Volunteering	Religion	Other
1 to 3	5.3	18.5	40.4	24.1	11.8	1.9	47.2	42.9
4 to 7	28.8	23.0	32.9	34.6	14.8	4.7	27.1	28.4
8 to 14	43.9	24.8	13.3	28.7	21.1	24.5	5.6	7.1
15 to 28	19.6	18.7	5.3	9.5	23.2	41.0	13.2	14.5
29 to 91	2.3	14.4	7.5	2.9	25.7	26.4	6.3	7.1
92 to 360	0.1	0.6	0.5	0.2	3.4	1.2	0.7	0.0
Total	100	100	100	100	100	100	100	100

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 about 3 percent (**Chart 2.24**).

Chart 2.24: Distribution of visitors by night spent, Zanzibar

Percent

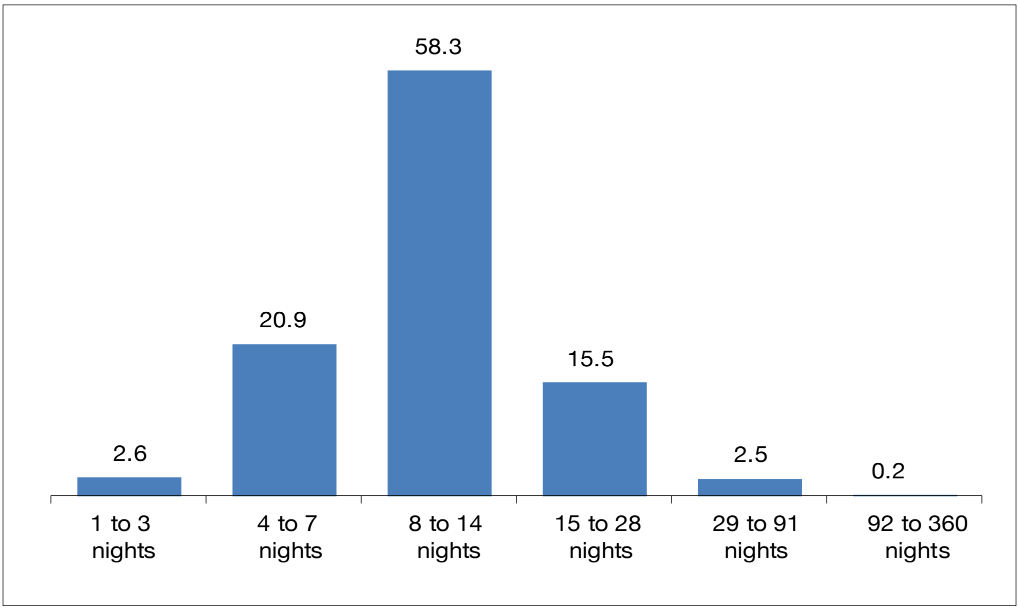
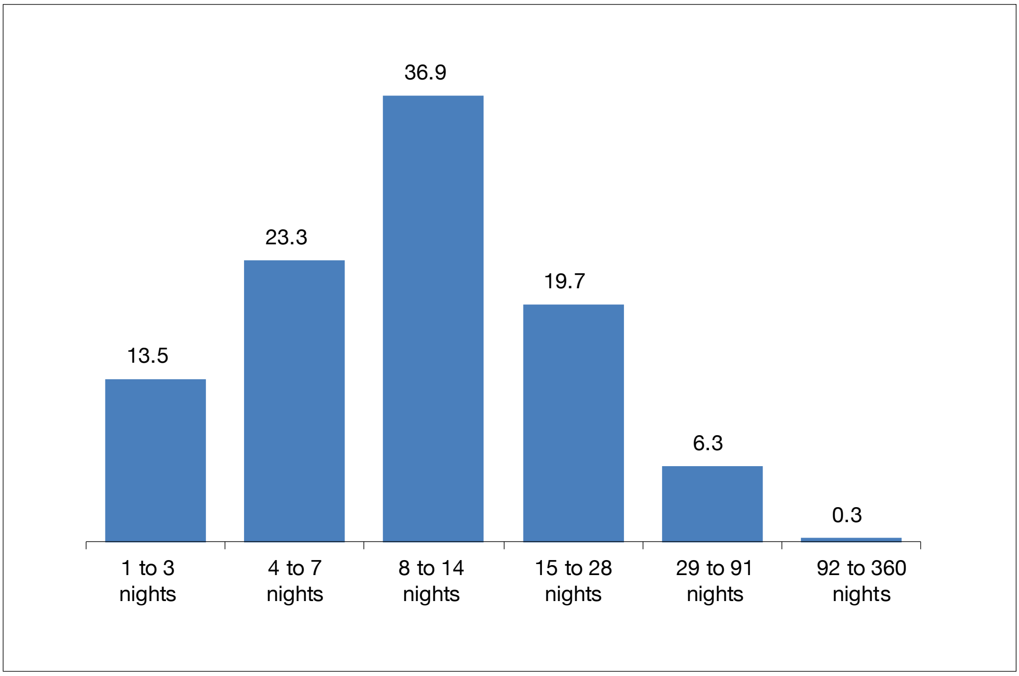


Chart 2.25 indicates that 36.9 percent of visitors to Mainland spent between 8 to 14 nights, followed by those who spent between 4 to 7 nights and 15 to 28 nights with 23.3 percent and 19.7 percent, respectively. The proportion of visitors who spent less than 3 nights and above 29 nights was less than 14.0 percent.

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

Percent



2.12 Average Length of Stay

The average length of stay for visitors to URT was 10 nights. The trend shows that the length of stay for URT has remained constant around 10 nights from 2012. The average length of stay of visitors who came for leisure and holidays and visiting friends and relatives was 10 nights. Visitors who came under other purpose of visits such as religious and volunteering recorded longest average length of stay of 12 nights. However, visitors who came for business purposes registered the shortest average length of stay of 8 nights (**Table 2.15**).

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

	Purpose of visit				
Country of residence	**Business**	**Leisure and holidays**	**Visiting friends and relatives**	**Other**	**Average**
United States of America	10	10	12	16	12
United Kingdom	12	12	12	17	13
Kenya	4	6	6	4	5
Italy	9	11	9	15	11
Germany	9	14	13	13	12
Netherlands	10	15	15	16	14
China	9	8	11	8	9
Uganda	5	6	7	4	6
South Africa	4	7	5	4	5
Switzerland	6	14	11	14	11
Canada	8	11	14	17	12
France	6	12	11	12	10
Australia	10	11	13	16	12
Zimbabwe	6	6	4	13	7
India	8	7	8	6	7
Average	8	11	10	12	10

Visitors from Netherlands and the United Kingdom stayed the longest with 14 and 13 nights respectively, followed by visitors from the United States of America, Germany, Switzerland, Canada and Australia countries who recorded 12 nights each. This is partly attributed to long haul nature of these market segments. On the other hand, visitors from South Africa and Kenya countries spent smallest number of 5 nights as most of them came under business purpose, which has shortest length of stay among all other purposes. The average length of stay for Tanzania Mainland had similar characteristics to URT.

In the case of Zanzibar, the average length of stay was 6 nights (**Table 2.16**). Visitors who came for business stayed shortest with average length of stay of 4 nights compared to other categories. Visitors from Australia stayed longest at 10 nights, followed by visitors from Italy and Belgium who stayed for an average of 8 nights each. However, visitors from the United States of America, South Africa, Canada and China spent smallest number of an average of 4 nights.

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

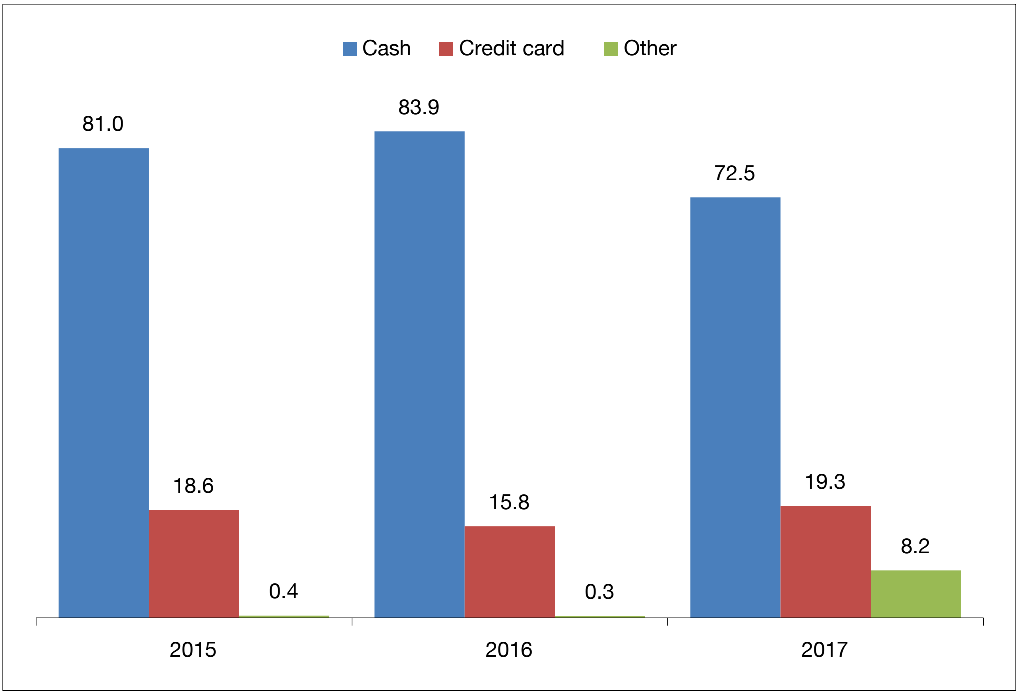
	Purpose of visit				
Country of Residence	**Business**	**Leisure and holidays**	**Visiting friends and relatives**	**Other**	**Average**
United States of America	3	5	3	5	4
United Kingdom	4	6	4	5	5
Italy	9	7	8	10	8
Netherlands	3	6	6	8	6
Germany	2	7	7	7	6
Switzerland	7	7	4	10	7
France	1	6	7	15	7
South Africa	3	6	4	3	4
Canada	4	4	4	4	4
Spain	2	6	7	5	5
China	2	4	9	4	4
Australia	4	6	7	27	10
Belgium		6	0	14	8
Kenya	3	4	3	13	5
Denmark	4	7	4	6	5
Average	4	6	5	9	6

2.13 Mode of Payment

The results revealed that about 73 percent of the interviewed visitors to URT paid their bills using cash, followed by those who paid through credit cards. Despite the dominance of cash payments, there is an improvement on the use of credit cards to 19.3 percent of the interviews visitors from 15.8 percent recorded in 2016 (**Chart 2.26**). Meanwhile, the number of visitors who used travellers' cheque and other modes of payment such as bank transfers; bankers' cheques remained small but higher than 2016. The same pattern was observed in Tanzania Mainland.

Chart 2.26: Mode of payment, URT

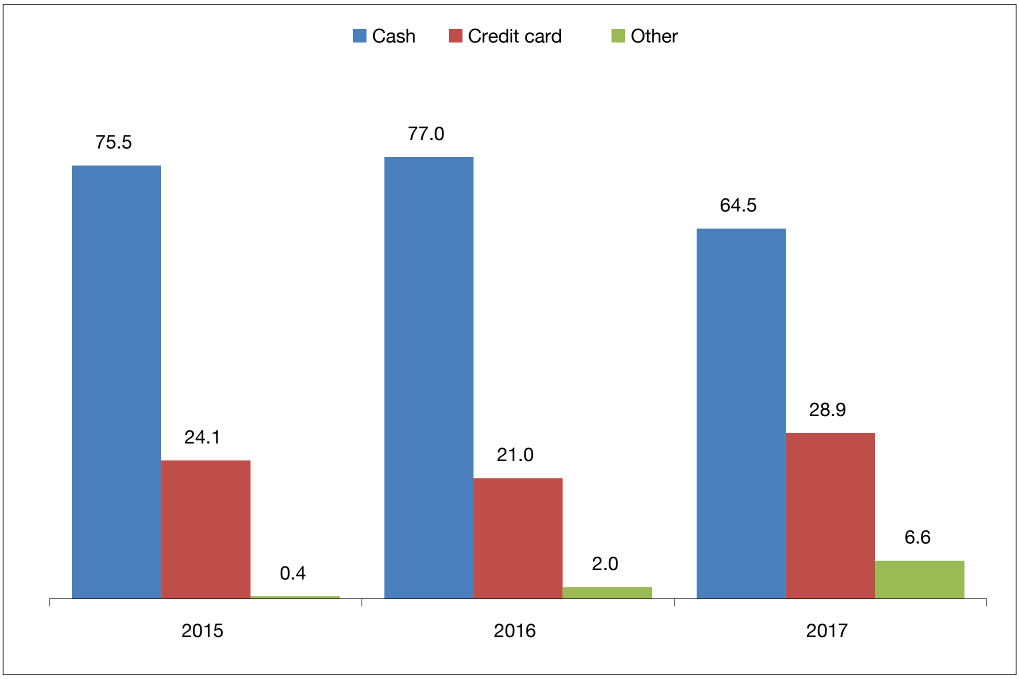
Percent



In Zanzibar, about 65 percent of interviewed visitors paid in cash, while 29 percent paid through credit cards. The usage of cash is also lower compared to 2016 survey results (**Chart 2.27**). The results show that both in Tanzania Mainland and Zanzibar, cash payments was dominant in package and non-package tour arrangements.

Chart 2.27: Mode of payment, Zanzibar

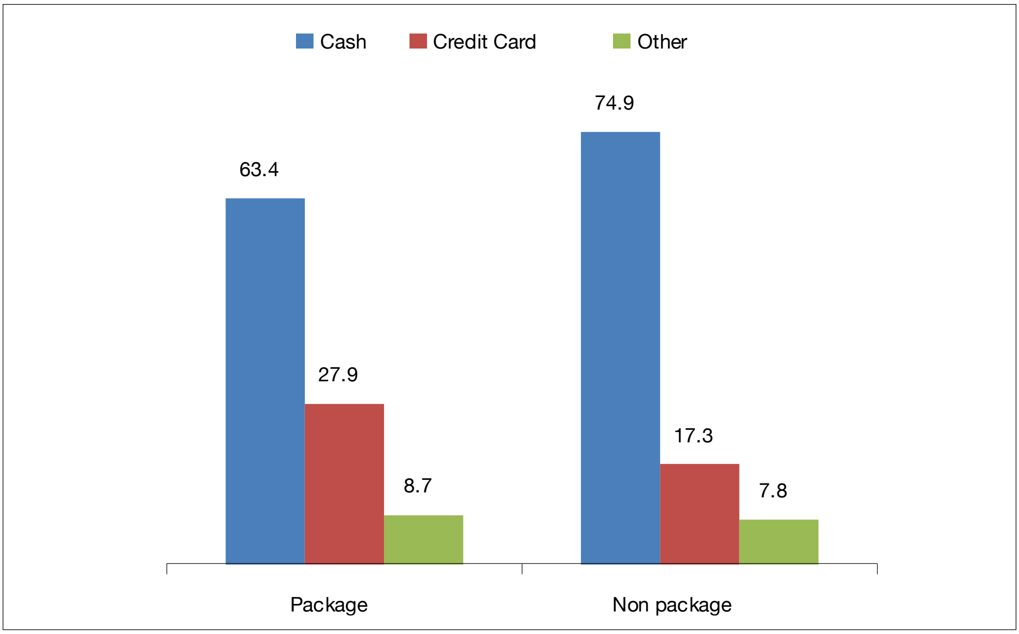
Percent



Analysis on modes of payment by tour arrangement reveal that majority of visitors who came under the package tour used credit cards in settling their bills compared to non-package tourists, despite the fact that cash was more prominent in both tour arrangements (**Chart 2.28**).

Chart 2.28: Mode of payment by tour arrangement, URT

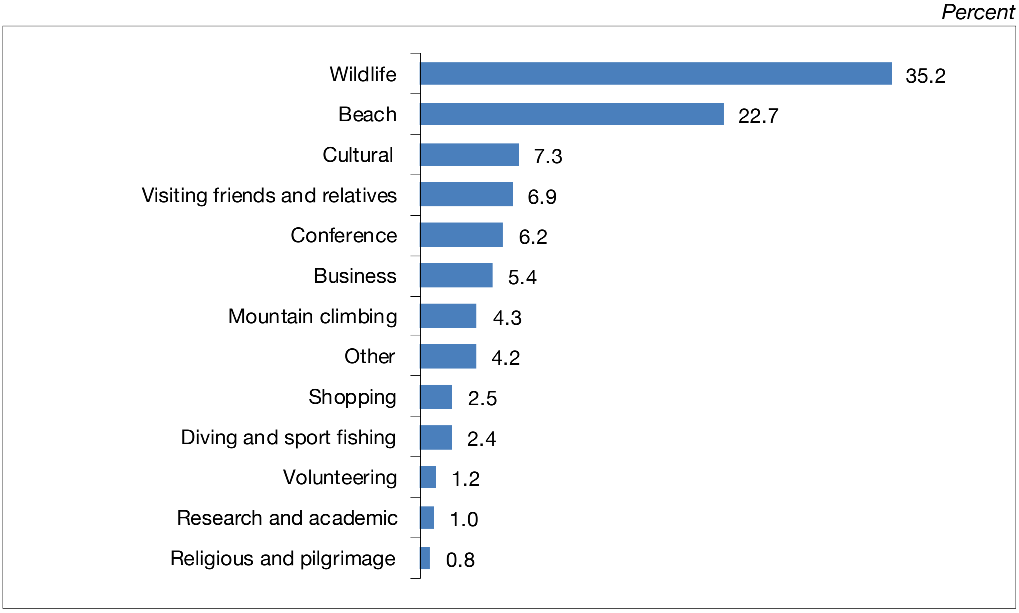
Percent



2.14 Tourism Activities

Wildlife continued to be the main tourism activities accounting for about 35 percent. The dominance of wildlife is associated with wildlife resources that are unique and have been widely known for many years. It is worth noting that, Tanzania is the only country in the world, which has allocated more than 25 percent of its total area for wildlife and other resources' conservation. The area includes 16 national parks, 28 game reserves, 44 game controlled areas, Ngorongoro conservation, and two marine parks. Other important tourism activities include beach, cultural heritage and historical sites, conference and mountain climbing (**Chart 2.29**).

Chart 2.29: Main tourism activities in URT

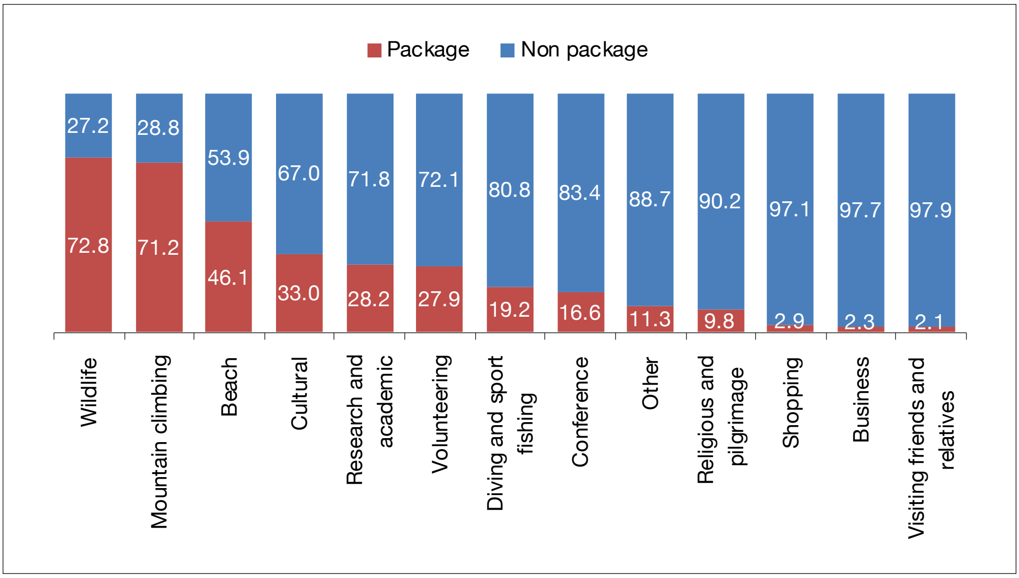


Beautiful attraction

Furthermore, the survey findings show that about 73 percent of the visitors who came for game viewing (wildlife) and mountain climbing used package tour arrangement. Majority of visitors who came to visit friends and relatives, business, religious and pilgrimage, conference as well as research and academic used the non-package tour arrangement (**Chart 2.30**).

Chart 2.30: Tourism activity and travel arrangement, URT

Percent



Wildlife

The top 15 source markets depicts that majority of visitors who preferred wildlife safari came from Netherlands, the United States of America, Switzerland, the United Kingdom, France and Germany accounting for about 69 percent, while majority of visitors from Italy, the United Kingdom, Kenya, Germany, France and South Africa came for beach tourism accounting for about 71 percent. Visitors from the neighboring Kenya and Uganda mainly came for conference and visiting friends and relatives. About 80 percent of visitors who came for mountain climbing were from the United States of America, the United Kingdom, Germany, China, Canada and Switzerland (**Table: 2.17**).

Table 2.17: Tourism activities by top 15 source markets, URT

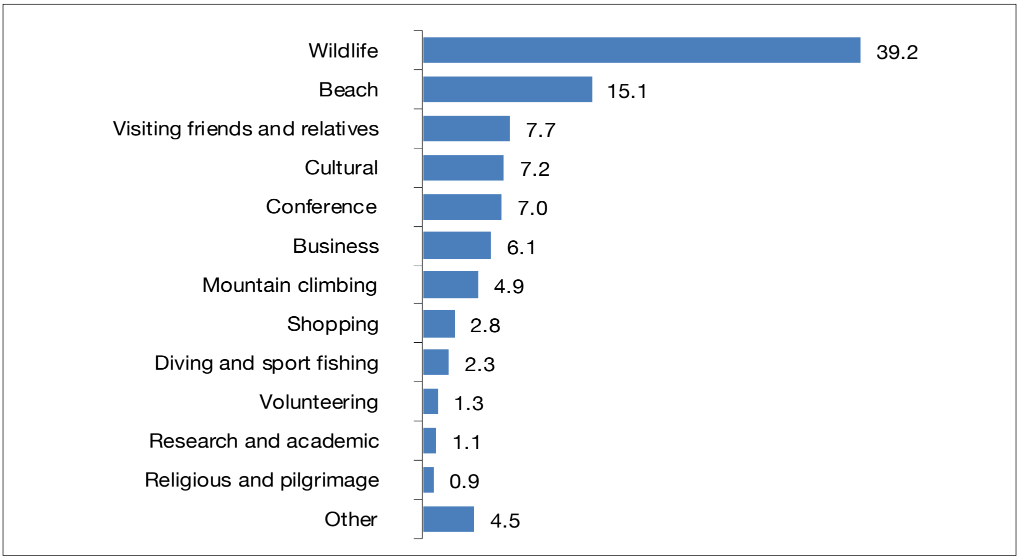
Percent

Country of residence	Tourism activities											
	Beach	Business	Conference	Cultural and historical	Sport and recreational	Mountain climbing	Other	Religious and pilgrimage	Research and academic	Visiting friends and relatives	Volunteering	Wildlife
United States of America	3.7	6.2	7.1	13.7	4.0	16.7	7.9	19.8	23.7	6.0	14.2	13.6
United Kingdom	17.2	10.4	6.0	24.5	11.6	15.6	9.1	2.4	16.4	8.4	21.1	10.7
Kenya	9.6	41.1	20.0	10.5	34.3	0.9	29.3	53.2	13.7	45.0	1.7	1.7
Italy	19.8	2.4	1.2	6.3	12.1	1.4	2.6	3.2	1.0	1.0	9.2	4.2
Germany	9.3	3.3	4.3	14.1	7.8	13.5	3.9	1.2	4.3	3.7	7.5	8.0
Netherlands	3.7	0.5	1.6	4.2	0.0	5.3	3.1	0.0	3.7	3.2	19.4	16.9
China	4.7	4.9	5.1	5.1	1.0	11.2	3.5	0.0	3.3	0.3	0.0	7.2
Uganda	2.1	35.8	13.3	0.9	15.5	0.2	20.5	13.5	25.4	19.1	1.1	0.4
South Africa	6.4	16.0	17.4	2.1	5.9	1.7	7.7	0.8	3.7	1.6	0.0	0.7
Switzerland	5.1	1.6	1.4	2.5	1.0	10.0	1.6	0.0	0.0	1.0	2.2	11.9
Canada	3.6	3.2	3.6	6.8	4.4	10.9	1.7	0.0	2.0	4.7	17.5	6.6
France	8.2	0.9	1.4	1.4	0.4	6.2	1.1	0.0	0.7	0.4	2.2	8.3
Australia	2.4	0.9	2.1	6.2	0.8	5.1	1.6	0.0	0.0	0.8	3.9	6.9
Zimbabwe	0.8	58.7	6.6	0.5	0.1	0.0	1.4	1.2	0.7	0.8	0.0	0.0
India	3.3	14.1	9.0	1.1	1.2	1.4	5.1	4.8	1.3	4.1	0.0	2.9
Total	100	100	100	100	100	100	100	100	100	100	100	100

Majority of visitors to Tanzania Mainland came for wildlife safaris accounting for about 40 percent. Other important tourism activities in Tanzania Mainland include beach, cultural, conferences, and visiting friends and relatives (**Chart 2.31**).

Chart 2.31: Tourism activities in Tanzania Mainland

Percent



Cultural tourism

In case of Zanzibar, beach was the main tourism activity, followed by cultural and historical sites largely explained by white sand beaches and historical sites in Stone Town. Visitors with higher preference for beach tourism were from Italy, the United Kingdom, South Africa and Germany. Visitors from the United States of America, the United Kingdom, Germany and Spain enjoyed Zanzibar's culture and the history of Stone Town (**Table 2.18**).

Table 2.18: Top 15 source markets and tourism activities, Zanzibar

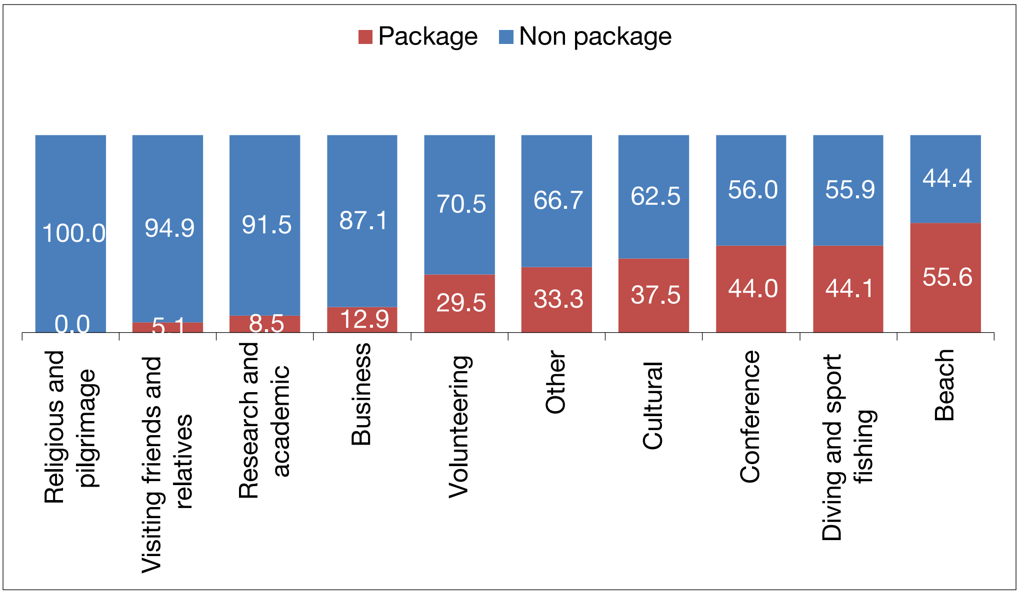
Percent

Country of residence	Tourism activities									
	Beach	Business	Conference	Cultural and historical	Sport and recreational	Other	Religious and pilgrimage	Research and academic	Visiting friends and relatives	Volunteering
United States of America	8.0	35.9	26.4	16.6	3.9	17.9	80.0	45.5	28.0	8.8
United Kingdom	12.3	15.4	11.3	13.9	15.7	16.0	0.0	12.1	17.8	11.8
Italy	22.5	2.6	2.8	8.1	30.7	7.5	0.0	6.1	0.0	2.9
Netherlands	3.6	0.0	2.8	6.2	0.0	8.5	0.0	3.0	11.2	32.4
Germany	9.1	10.3	9.4	11.4	13.4	6.6	20.0	15.2	9.3	8.8
Switzerland	4.7	0.0	0.0	2.7	4.7	5.7	0.0	0.0	4.7	2.9
France	7.7	2.6	1.9	1.7	0.8	3.8	0.0	0.0	0.0	0.0
South Africa	11.6	20.5	19.8	3.9	9.4	10.4	0.0	3.0	0.0	0.0
Canada	3.3	0.0	0.0	4.3	9.4	1.9	0.0	6.1	11.2	13.2
Spain	3.1	0.0	0.9	10.3	3.9	5.7	0.0	0.0	0.0	4.4
China	3.0	2.6	6.6	1.4	0.0	3.8	0.0	6.1	0.0	0.0
Australia	2.9	0.0	3.8	6.2	0.8	2.8	0.0	0.0	0.9	0.0
Belgium	2.1	0.0	0.0	3.7	3.9	1.9	0.0	0.0	0.0	8.8
Kenya	4.6	10.3	10.4	5.2	3.1	3.8	0.0	3.0	15.9	2.9
Denmark	1.7	0.0	3.8	4.4	0.0	3.8	0.0	0.0	0.9	2.9
Grand Total	100	100	100	100	100	100	100	100	100	100

In the case of tour arrangement**,** the majority of visitors who came for beach, conference, diving and sport fishing used the package tour, while majority of the non package visitors came for religious mission, culture, research and academic and visiting friends and relatives (**Chart 2.32**)**.**

Chart 2.32: Tourism activity by travel arrangement, Zanzibar

Percent



Exotic beaches of zanzibar

2.15 Average Expenditure

The overall average expenditure per person per night was USD 161, compared with USD 178 recorded in 2016, which is a decrease of 9.5 percent. The lower average expenditure per person is associated with increase in the number of visitors from the neighboring countries whose main purpose of visit is visiting friends and relatives and business. Average expenditures in these purposes are usually low. The average expenditure per person per night for visitors who came under the package tour arrangement was USD 411, while those who used non-package tour arrangement spent an average of USD 136 per person per night. Visitors on leisure and holidays were the highest spenders at an average of USD 356 per person per night. Visitors from the United States of America, China, the United Kingdom, Canada, Norway, Netherlands, Italy, South Africa and France spent the most with their average expenditures above the national average of USD 161 per person per night (**Table 2.19**).

Table 2.19: Average expenditure by purpose of visit for top 15 source markets

Value in USD

Country of residence	Purpose of visit				Overall average
	Business	Leisure and holidays	Visiting friends and relatives	Other	
United States of America	255	255	161	123	327
China	142	263	111	216	277
Switzerland	257	165	87	60	230
Canada	300	286	227	31	211
Norway	72	233	56	181	196
Netherlands	144	157	75	181	194
United Kingdom	243	260	83	78	187
South Africa	133	186	113	156	186
Italy	38	104	384	114	183
France	578	188	37	99	166
India	316	283	203	160	151
Zimbabwe	104	151	41	74	132
Australia	74	328	81	38	130
Germany	202	176	37	72	126
Kenya	120	126	39	102	95

The overall average expenditure for Tanzania Mainland was USD 162 per person per night compared with USD 189 recorded in the previous year. In Zanzibar, overall expenditure was USD 177 per person per night, up from USD 102.6. Similar to the case of URT, visitors on leisure and holidays spent most in both Tanzania Mainland and Zanzibar with an average of USD 373 and USD 248, respectively.

2.16 Tourism Earnings

Tourism earnings in the United Republic of Tanzania increased by 5.6 percent to USD 2,250.3 million in 2017, from USD 2,131.6 million recorded in 2016. This outturn was mainly driven by an increase in the number of international tourist arrivals to 1,327,143 from 1,284,279 visitors recorded in 2016. Out of the total amount earned in 2017, USD 1,911.3 million was from visitors who came for leisure and holidays, which accounted for 84.9 percent. Earnings from tourists who came to visit friends and relatives were the lowest with USD 118.1 million (**Table 2.20**). The findings also indicate that earning from the visitors who came under the non-package tour arrangement were slightly higher (51.9 percent).

Table 2.20: Tourism earnings by purpose of visit and travel arrangement, URT

Millions (USD)

	Travel arrangement		
Purpose of visit	**Package**	**Non package**	**Total earnings**
Leisure and holidays	1,048.6	862.8	1,911.3
Visiting friends and relatives	10.9	107.2	118.1
Business	10.6	57.2	67.8
Other	13.1	140.0	153.1
Tourism earnings	1,083.2	1,167.1	2,250.3

Tourism earnings in Zanzibar increased by 21.7 percent to USD 489.0 million in 2017 compared with USD 383.0 million earned in 2016, largely associated with increase in visitors' expenditure. Visitors who came for leisure and holidays spent the most. Earnings from the tourists who came under the package tour arrangement accounted for 50.3 percent (**Table 2.21**).

Table 2.21: Tourism earnings by purpose of visit and travel arrangement, Zanzibar

Millions (USD)

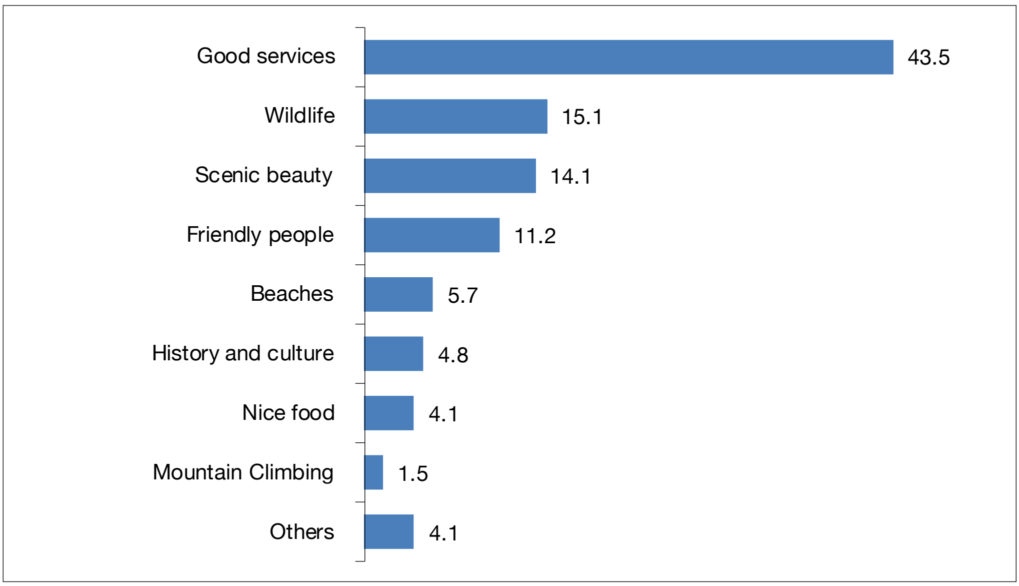
Purpose of visit	Travel arrangement		Total earnings
	Package	Non package	
Leisure and holidays	245.2	240.8	486.0
Business	0.4	1.0	1.4
Visiting friends and relatives	0.3	0.7	1.0
Other	0.4	0.3	0.7
Total	246.2	242.8	489.0

2.17 Visitors' Impression

Visitors were mostly impressed by good hospitality towards visitors in most of the tourist attractions, wonderful wildlife and the scenic beauty of the country, which include the landscape, forestry, natural surroundings. Friendly people, white sandy beaches, historical sites, culture and country's nicely prepared fresh foods also made visitors' enjoy their stay while in Tanzania (**Chart 2.33**).

Chart 2.33: Visitor's impression, URT

Percent

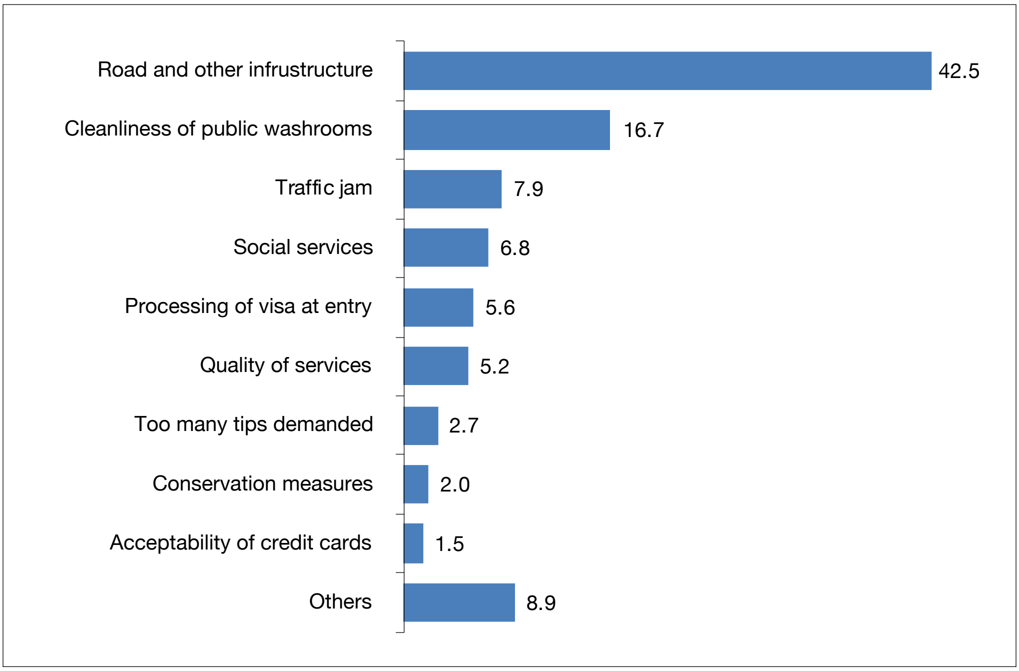


2.18 Areas that Need Improvement

Survey results show that conditions of road and other infrastructure continued to be the main area of concern to most visitors (42.5 percent). The other areas of major concern that need improvement are cleanliness of public washrooms, traffic jam in Dar es Salaam, provision of social services such as utilities and education, the time taken in processing entry visa (**Chart 2.34**). There are efforts being taken by the government to address these concerns including the ongoing investments in the rail and road infrastructure which are expected to substantially improve transportation services and ease the traffic jam. Airport facilities and visa processing are also expected to improve significantly after completion of terminal three of Julius Nyerere International Airport envisaged to handle 6 million international arrivals. The government has also embarked on various initiatives aimed at improving the quality of services including re-grading of hotels and accommodation facilities, upgrading/expansion of the college of tourism and formalization of porters association.

Chart 2.34: Areas that need improvement

Percent



Chapter 3: Conclusion and Recommendations

3.1 Conclusion

The importance of tourism sector has made it necessary to conduct a series of international visitors' exit survey on annual basis in order to obtain necessary information for compilation of Balance of Payments and National Account statistics, construction of Tourism Satellite Account and promotion of tourism sector. This chapter presents the conclusion and recommendation arising from the 2017 International Visitors' Exit Survey.

The survey findings reveal that earnings from tourism increased by 5.6 percent to USD 2,250.3 million in 2017, from USD 2,131.6 million recorded in 2016 mainly driven by a rise in the number of international tourist arrivals to 1,327,143 from 1,284,279 visitors recorded in 2016. The overall average expenditure per person per night of a visitor was USD 161 in 2017 compared to USD 178 registered in 2016. The findings also indicate that the average length of stay for visitors to URT was 10 nights, the length that has remained at that level since 2012.

3.2 Recommendations;

i. The survey results indicate that the overall average length of stay of visitors to the United Republic of Tanzania has remained around 10 nights for the past six years. This implies that efforts still need to be made to enhance diversification and promotion of the tourism products in order to increase the number of nights spent at a destination. The increase in the length of stay of visitors is likely to have a positive impact on the tourism earnings.

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

ii. The findings indicated that unacceptability of credit cards at most of the tourism establishments continue to be a problem. About 19.0 percent of interviewed visitors paid their bills through credit cards while about 73.0 percent settled their bill through cash. This implies that there is a need to sensitize owners of tourism establishment and other relevant stakeholders on the importance and benefits of allowing visitors to make use of credit cards when settling their bills.

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

iii. The findings also indicate that some visitors were not contented with the level of hygiene in cities and airports. Therefore, there is a need for municipal authorities to reinforce cleanliness laws and regulations. For instance, increase sanitary facilities, litterbin along the streets and increased awareness on hygiene.

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

iv. Traffic jam in Dar es Salaam and rough roads in some national parks were also issues of concern to tourists. The construction of TAZARA fly over and Ubungo interchange is expected to reduce the problem of traffic jam in Dar es Salaam. However, the government is advised to speed up the ongoing efforts of addressing infrastructural issues.

Responsible Institutions: MoW, MoT and DDC

v. Visitors also raised concerns on the time taken in processing entry visa at airports and other entry points. In this regard, it is worth noting that the government has embarked on e-immigration program to facilitate, among others, issuance of e-visa, which is expected to be ready by June, 2018. In addition, completion of terminal III at JNIA is also expected to provide conducive environment to speed up visa processing on arrival. These initiatives need to be expedited.

Responsible Institutions: Immigration Services Department, MOFAEAC

Appendices

Appendix A: Survey Methodology

I. Introduction

The survey was designed to collect wide range of information that would facilitate a better understanding of the status of tourism sector. It consists of designing a sample and sample selection; survey instruments including a questionnaire; scope and coverage; training; data collection and processing; and expenditure estimation procedures.

II. Scope of the Survey

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

III. Sample Size

The sample survey was designed to cover 12,843 departing international visitors, equivalent to one percent of the international visitors recorded in 2016. Ultimately, the survey managed to randomly interview 10,926 respondents who represented 20,977 visitors. This sample was considered sufficient to meet survey objectives.

IV. Data Collection

Data collection exercise was undertaken during the tourist peak season which normally runs from July to September. It was conducted for two weeks from 31st July 2017 to 13th August 2017. A team of 30 enmerators from participating institutions were involved in the data collection exercise. Technical Committee members participated in the field supervision to ensure questionnaires completeness, quality and consistency.

V. Survey Coverage

In order to obtain the required information from international visitors the survey was conducted at eight departure points namely Julius Nyerere

International Airport, Kilimanjaro International Airport, Abeid Amani Karume International Airport, Horohoro, Namanga, Tunduma, Mtukula and Manyovu borders.

VI. Enumerators' Manual

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

VII. Training of Enumerators

Prior to fieldwork, a one day training of enumerators and supervisors was organized by TC members. The purpose of the training was to guide the enumerators to understand the questionnaire and interviewing techniques. Enumerators were also trained on methods of onsite data editing, quality control procedures and fieldwork coordination.

VIII. The Questionnaire

The questionnaire was designed to ensure that the questions asked captures the required data. The information collected is useful for tourism promotion and macroeconomic policy formulation. The content of the questionnaire was almost similar to the previous years' questionnaire. The questionnaire had 23 questions comprising four main parts namely: visitor profiles, travel behavior, expenditure patterns and visitor comments (**Appendix III**).

Questions 1 to 9 aimed at establishing visitor profiles (nationality, country of residence, age group, gender, purpose of visit, type of tourism activity and source of information about Tanzania).

Questions 10 to 16 targeted at obtaining travel behaviour namely type of tour arrangement (package/non-package), items in the package and number of nights spent.

Questions 17 to 21 were structured to estimates tourism expenditure. The questions probed for details on the amount spent as well as mode of payments used to transact.

Question 22 and 23 seek information on visitors' impression and areas that need improvements.

IX. Data Processing

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 ORACLE 11 database and web-based application.

X. Tourism Expenditure Estimation

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

The model is depicted in the following equation:

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

Whereby:

E_v = Total tourist expenditure in Tanzania

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

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

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

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

T = Average length of stay derived from the survey.

The Simplified Model

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

Procedure and assumptions used for the estimation of tourist expenditure for 2017;

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

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

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

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

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

Appendix B: Questionnaire

THE 2017 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 Services 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	[ ]
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

	Number of females	
	Number of males	

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

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

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

Wildlife tourism	[ ]	Mountain climbing	[ ]
Beach tourism	[ ]	Hunting tourism	[ ]
Cultural tourism	[ ]	Conference tourism	[ ]
Bird watching	[ ]	Business	[ ]
Diving and Sport Fishing	[ ]	Others (please specify):	

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

Travel agent, tour operator	[ ]	Inflight magazines	[ ]
Friends, relatives	[ ]	Tanzania Mission Abroad	[ ]
Trade fair	[ ]	Radio, TV, Web (please specify):	
Newspaper, magazines, brochures	[ ]	Others (please specify):	

10. Did you travel on non-package or booked a package tour?

	Non package	Package
(*If you travelled on non package, go to question 16*)		

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

International transport (air ticket/ fare)	[ ]	Sightseeing/excursion/ game activities	[ ]
Accommodation	[ ]	Guided tour	[ ]
Food and Drinks	[ ]	Travel insurance	[ ]
Internal transportation in Tanzania	[ ]	Other (please specify)	

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

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

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

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

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

Zanzibar Islands [ ]

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		
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………..	
Shopping (Souvenirs, precious metals, crafts, etc)	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?

____

____

____

____

____

____

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

____

____

____

____

____

____

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

Appendix C: International visitors arrival

Country of residence	Total visitors	% Share
Kenya	231,031	17.4
United States America	82,238	6.2
Burundi	66,604	5.0
United Kingdom	60,491	4.6
Germany	58,370	4.4
Italy	51,414	3.9
Rwanda	50,476	3.8
South Africa	48,046	3.6
India	39,128	2.9
Uganda	36,856	2.8
Israel	36,640	2.8
France	33,925	2.6
Malawi	29,014	2.2
China	28,938	2.2
Netherlands	26,069	2.0
Zimbabwe	26,002	2.0
Mozambique	23,439	1.8
Zambia	22,151	1.7
Canada	18,453	1.4
Australia	15,411	1.2
Switzerland	14,474	1.1
Spain	13,942	1.1
Oman	13,426	1.0
Denmark	13,419	1.0
Zaire	13,369	1.0
Sweden	12,722	1.0
Belgium	12,253	0.9
Poland	12,241	0.9

Country of residence	Total visitors	% Share
Russia	10,610	0.8
Turkey	9,346	0.7
Norway	8,983	0.7
Comoro	8,945	0.7
Burkinafaso	8,849	0.7
Korea (South)	7,640	0.6
Ukraine	7,260	0.5
Japan	6,888	0.5
Austria	6,733	0.5
Romania	6,543	0.5
Czech	6,376	0.5
Ireland	6,138	0.5
Finland	5,972	0.4
Nigeria	5,722	0.4
Egypt	4,614	0.3
Sudan	4,099	0.3
Pakistan	4,077	0.3
New Zealand	3,621	0.3
United Arab Emirates	3,573	0.3
Brazil	3,477	0.3
Uruguay	3,397	0.3
Portugal	3,268	0.2
Ethiopia	2,947	0.2
Slovakia	2,927	0.2
Ghana	2,916	0.2
Philipines	2,893	0.2
Bulgaria	2,571	0.2
Hungary	2,086	0.2
Serbia	2,080	0.2
Morocco	2,022	0.2

Country of residence	Total visitors	% Share
Swaziland	1,997	0.2
Thailand	1,959	0.1
Iraq	1,908	0.1
Yemen	1,895	0.1
Jordan	1,878	0.1
Indonesia	1,860	0.1
Malaysia	1,731	0.1
Croatia	1,676	0.1
Mexico	1,670	0.1
Djibuti	1,643	0.1
Argentina	1,606	0.1
Congo	1,562	0.1
Greece	1,530	0.1
Hong-kong	1,468	0.1
Cyprus	1,460	0.1
Botswana	1,448	0.1
Sri Lanka	1,447	0.1
Somalia	1,421	0.1
Saud Arabia	1,418	0.1
Angola	1,389	0.1
Singapore	1,355	0.1
Mauritius	1,342	0.1
Cameroon	1,321	0.1
Syria	1,272	0.1
Namibia	1,251	0.1
Slovenia	1,209	0.1
Vietnam	1,206	0.1
Malta	1,194	0.1
Colombia	1,176	0.1
Jamaica	1,147	0.1

Country of residence	Total visitors	% Share
Iceland (Island)	1,047	0.1
Dominica	1,031	0.1
Chile	1,030	0.1
Lithunia	1,019	0.1
Korea (North)	973	0.1
Capeverde	927	0.1
Taiwan	918	0.1
Lesotho	909	0.1
Ivory Cost	884	0.1
Madagascar	869	0.1
Tunisia	864	0.1
Estonia	852	0.1
Seychelles	843	0.1
Nepal	795	0.1
Gabon	776	0.1
Belerus	755	0.1
Ecuado	734	0.1
Costarica	727	0.1
Lebanon	699	0.1
Latvia	673	0.1
Algeria	664	0.1
Kuwait	595	0.0
Bahama	572	0.0
Luxembourg	532	0.0
Peru	526	0.0
Bangladesh	515	0.0
Mauritania	490	0.0
Afghanistan	478	0.0
Mali	464	0.0
Mongolia	428	0.0

Country of residence	Total visitors	% Share
Bosnia Herzg	403	0.0
Siera Leone	383	0.0
Hellenic	365	0.0
Bahrain	361	0.0
Bermuda	352	0.0
Qatar	346	0.0
Armenia	344	0.0
Venezuela	344	0.0
Cambodia	335	0.0
Moldova	334	0.0
San marino	329	0.0
Fiji	328	0.0
Macedonia	322	0.0
Trinidad	301	0.0
Guinea Bissau	287	0.0
Gambia	286	0.0
Senegal	256	0.0
Grenada	252	0.0
Albania	247	0.0
Kazakhstan	245	0.0
Myanmar(Burma)	245	0.0
Togo	234	0.0
Liberia	232	0.0
Guyana	230	0.0
Central African Republic	229	0.0
El-salvado	228	0.0
Antagua	221	0.0
Guinea	219	0.0
Barbados	207	0.0
Nicaragua	207	0.0
Libya	188	0.0
Benin	187	0.0

Country of residence	Total visitors	% Share
Cuba	180	0.0
Monaco	178	0.0
Papua N.Guinea	174	0.0
Tajikstan	169	0.0
Honduras	159	0.0
Georgia	154	0.0
Niger	152	0.0
Chad	151	0.0
Paraguay	140	0.0
Bolivia	135	0.0
Eritrea	135	0.0
Andora	132	0.0
Suriname	132	0.0
Iran	117	0.0
Palestina	114	0.0
Guatemala	104	0.0
Sao Tome/St. Thomas	95	0.0
Arzabejian	81	0.0
Liechtestein	78	0.0
Montenegro	73	0.0
Panama	62	0.0
Haiti	61	0.0
Stateless	52	0.0
Uzbekistan	40	0.0
Kyrgyz	31	0.0
Belize	19	0.0
Bruney	18	0.0
Equatorial Guinea	10	0.0
Laos	7	0.0
Total	1,327,143	100.0

References

BOT, MNRT, NBS, IMMIGRATION SERVICES DEPARTMENT, ZCT (2016), *Tanzania Tourism Sector Survey Report*

United Nation World Tourism Organization (2018), *World Tourism Barometer*; Volume 13, January 2018

United Nation World Tourism Organization (2018), *World Tourism Barometer*; Volume 13, March 2018

Websites;
United Nation World Tourism Organization, http://www.unwto.org
Tanzania Tourist Board, http://www.tanzaniatouristboard.com

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

Bank of Tanzania (BOT)
www.bot.go.tz

Zanzibar Commission for Tourism (ZCT)
www.zanzibartourism.net

National Bureau of Statistics (NBS)
www.nbs.go.tz

Immigration Department
www.moha.go.tz