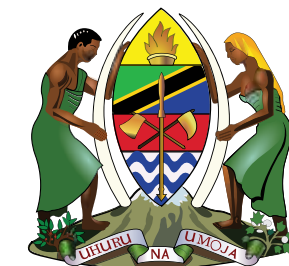




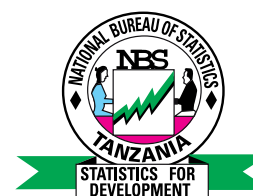
# THE 2023 INTERNATIONAL **VISITORS' EXIT** **SURVEY REPORT**





## **TANZANIA TOURISM SECTOR SURVEY**

### **THE 2023 INTERNATIONAL VISITORS' EXIT SURVEY REPORT**



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## ABBREVIATIONS AND ACRONYMS

GDP	Gross Domestic Product
MNRT	Ministry of Natural Resources and Tourism
NBS	National Bureau of Statistics
TANAPA	Tanzania National Parks Authority
TATO	Tanzania Association of Tour Operators
TCT	Tourism Confederation of Tanzania
TTB	Tanzania Tourist Board
UNWTO	United Nations World Tourism Organization
ZATI	Zanzibar Association of Tourism Investors
ZCT	Zanzibar Commission for Tourism
ZTITE	Zanzibar Tourism Investment and Travel Exhibition

## TANZANIA TOURISM PROFILE

Tanzania, located in East Africa, is renowned for its breathtaking landscapes, diverse wildlife, and rich cultural heritage. With its stunning natural attractions, including Mount Kilimanjaro, the Serengeti National Park, and Zanzibar's pristine beaches. Tanzania has become a premier destination for travelers seeking adventure, wildlife safaris, and cultural experience.



**Geographical Features:** Tanzania boasts a varied landscape, ranging from the snow-capped peaks of Mount Kilimanjaro, Africa's tallest mountain, to the vast savannahs of the Serengeti plains. The country is also home to the spectacular Ngorongoro Crater, a UNESCO World Heritage Site, and the renowned Selous Game Reserve, one of the largest protected wildlife areas in Africa. Along its coastline lie idyllic islands such as Zanzibar, famous for its spice farms, white sandy beach and historical Stone Town.



**Wildlife and Safaris:** Tanzania is blessed with wildlife safaris, offering unparalleled opportunities to witness the “Big Five” (lion, elephant, buffalo, leopard, and rhinoceros) in their natural habitat. The Serengeti National Park hosts the annual Great Migration, where millions of wildebeest and zebras traverse the plains in search of water and grazing grounds. Other popular wildlife destinations include Tarangire National Park, Lake Manyara National Park, and the remote Ruaha National Park.



**Cultural Diversity:** Tanzania is a melting pot of cultures, with over 120 ethnic groups speaking various languages and practicing diverse traditions. Visitors can immerse themselves in the vibrant Maasai culture, known for its colorful attire, traditional dances, and pastoral way of life. The Swahili culture, influenced by centuries of trade and interaction along the East African coast, which is prevalent in coastal cities like Dar es Salaam and Zanzibar—with its unique blend of Arab, Indian, and African elements.



**Adventure Tourism:** For adrenaline enthusiasts, Tanzania offers a plethora of adventure activities. Climbing Mount Kilimanjaro—the highest freestanding mountain in the world, which is a bucket-list experience for many. The country's numerous national parks and reserves provide opportunities for hiking, hot air ballooning, birdwatching, and even chimpanzee trekking in the lush forests of Gombe Stream and Mahale Mountains National Parks.



**Marine Tourism:** Tanzania's coastline along the Indian Ocean is a haven for marine enthusiasts. Visitors can explore pristine coral reefs teeming with marine life while snorkeling or diving in destinations like Mafia Island and the Mnemba Atoll. The turquoise waters surrounding Zanzibar offer excellent opportunities for water sports such as sailing, kiteboarding, and deep-sea fishing.



**Infrastructure and Hospitality:** Tanzania has made significant investments in its tourism infrastructure, with a wide range of accommodations to suit every budget and preference. From luxury lodges and tented camps in the wilderness to boutique hotels and beach resorts along the coast, visitors can find comfortable accommodations that complement their travel experience. Tanzanian hospitality is renowned for its warmth and friendliness of people, ensuring that guests feel welcome and well taken care of throughout their stay.

Generally, Tanzania's tourism sector continues to attract travelers from around the globe with its unparalleled natural beauty, rich cultural heritage, and diverse range of experiences. With the ongoing conservation initiatives, and infrastructure improvements, Tanzania is poised to remain a top destination for adventure seekers, wildlife enthusiasts, and cultural explorers for years to come.

## GLOSSARY

**Average length of Stay** - the average number of nights that visitors spend in a destination.

**Business visitor** - a visitor whose main purpose for a tourism trip corresponds to the business and professional category of purpose.

**Country of reference** - the country for which the measurement is done.

**Cultural tourism** - subset of tourism concerned with a country or region's culture, specifically the lifestyle of the people in those geographical areas, the history of those peoples, their art, architecture, religion(s), and other elements that helped shape their lives.

**Domestic tourism** - comprises tourism activities of a resident visitor within the country of reference either as part of a domestic tourism trip or part of an outbound tourism trip.

**Excursionist** - the (same-day visitor) is a non-resident visitor arriving and depart from a country within the span of a single day.

**Inbound tour operator** - a tourism operator who usually serves travelers arriving from overseas country.

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

**Independent/Non-package Tour** - self travel arrangement which doesn't include pre- arrangements and all items and service purchased at host destination.

**Package tour** - pre-arranged trip (normally by travel agents) done outside the country with combination of elements such as air, hotel, sightseeing, and social events put together and sold at an all-inclusive price in a single transaction.

**Place of usual residence** - geographical place where the enumerated person usually resides, and is defined by the location of his/her principal dwelling.

**Purpose of visit** - the reason that necessitates the trip, in the absence of which the trip would not have taken place.

**Tourism expenditure** - the amount paid for the acquisition of consumption goods and services, as well as valuables, for own use or to give away, for and during tourism trips. These include expenses incurred directly by visitors themselves, as well as costs covered or reimbursed by third parties.

## FOREWORD

The 2023 International Visitors' Exit Survey Report offers an evaluation of the developments within the tourism sector, both at global and national levels. The report has been instrumental in providing important information to various stakeholders, particularly, the Government, aiding in policy formulation and effective strategy for tourism promotion initiatives.

Globally, the sector has made a remarkable recovery, with many destinations either reaching or surpassing pre-pandemic levels of arrivals and receipts. In 2023, international arrivals reached an estimated 1.3 billion, equivalent to 88 percent of pre-pandemic levels. The released pent-up demand, improved air connectivity, and a robust recovery in Asian markets and other destinations, which are expected to support full recovery by the end of 2024.

Tanzania has also demonstrated commendable performance, witnessing a notable increase in international visitor arrivals by 24.3 percent to 1,808,205 in 2023—an all time high. Consequently, international tourism earnings surged by 33.5 percent to USD 3,373.8 million in 2023 from USD 2,527.8 million in 2022.

The outlook for 2024 appears promising, and this performance is expected to be sustained, owing to ongoing government initiatives aimed at fostering conducive domestic macroeconomic environment and intensified efforts to promote Tanzania as the premier tourism destination through various promotion efforts including the Royal Tour documentary.

We trust that this report provides important information to various stakeholders in the tourism sector, aiding in the formulation of strategies to enhance services and bolster earnings in the future.



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



**Mr. Emmanuel M. Tutuba**  
Governor  
Bank of Tanzania

## ACKNOWLEDGEMENT

The Steering Committee of the Tanzania Tourism Exit Survey, extends its heartfelt gratitude to various stakeholders from within and outside the collaborating institutions who generously contributed to the completion of the International Tourism Exit Survey for 2023.

We sincerely thank each traveler who voluntarily took the time to fill out the exit survey questionnaire. Your willingness to provide information and candid feedback has been instrumental and is highly appreciated. Special appreciation is also extended to the staff of the Immigration Services Department, particularly at the departure points of Julius Nyerere International Airport, Abeid Amani Karume International Airport, Kilimanjaro International Airport, Horohoro, Namanga, Tunduma, Mtukula and Manyovu, who hosted the committee during the two week of data collection.

The guidance received from the Chief Executive Officers of the participating institutions namely: the Ministry of Natural Resources and Tourism (MNRT); Bank of Tanzania (BOT); National Bureau of Statistics (NBS); Immigration Services Department (ISD); Zanzibar Commission for Tourism (ZCT) and the Tourism Confederation of Tanzania (TCT) is highly valued.

The dedicated team responsible for the production of this Report included Edward Mtarima Kohi (Director of Tourism – MNRT) and Suleiman Missango (Director, Economic Research and Policy-BOT). Other members of the Steering Committee are Daniel Masolwa (Director for Economic Statistics – NBS), Edward Chogero (Commissioner, Finance and Administration –ISD) and Aviwa Issa (Director for Human Resource, Planning and Administration – ZCT).

The survey data analysis and report writing were conducted by Technical Team, led by Paskasi Mwiru (MNRT) and Villela Waane (BOT). Other members of the team include Placydia Kamazima , Phillip Mboya, Gloria Mbiha, Gabriel Mafie, Tumaini Longishu, Taimur Kattanga, Rweyemamu Barongo from BOT; Josephat Msimbano from MNRT; Valerian Tesha, Eliaranya Lema and Jovitha Rugemalila from NBS; Philimon Msenya from ISD and Maabad Jaffar from (ZCT).

## EXECUTIVE SUMMARY

This section provides a summary of global and destination Tanzania developments, along with key findings from the 23<sup>rd</sup> cycle of the International visitors' Exit Survey conducted in 2023.

### Global tourism developments

In 2023, international tourism rebounded to 88 percent of pre-pandemic levels, reaching 1.3 billion arrivals, as reported by UNWTO World Tourism Barometer (January 2024). The year was marked by ongoing recovery from the COVID-19 pandemic, with a focus on sustainability, technological advancements, and efforts to diversify destinations.

### Tourism developments in Tanzania

Tanzania's tourism sector experienced significant rebound, reflected by increased tourist arrivals and per capita spending. In 2023, tourism earnings in the United Republic of Tanzania surged by 33.5 percent to USD 3,373.8 million from USD 2,527.8 million in 2022. Correspondingly, international arrivals rose by 24.3 percent to 1,808,205 in 2023 from 1,454,920 recorded in 2022.

### Main findings of the 23<sup>rd</sup> cycle of tourism exit survey

- i. The top 15 source markets in 2023 remained largely consistent with 2022, with the United States of America, Italy, and Germany leading the list. Notably, Italy reclaimed its top position for Zanzibar.
- ii. Tourism earnings in the United Republic of Tanzania increased by 33.5 percent to USD 3,373.7 million in 2023 from USD 2,527.8 million in 2022, driven by a 24.3 percent increase in the number of international to 1,808,205.
- iii. In URT, the overall average expenditure per person per night rose by 17 percent to USD 250 in 2023 from USD 214 in 2022. In Zanzibar, the overall average expenditure was USD 257 per person per night in 2023, up from USD 218 in 2022.
- iv. The overall average length of stay in URT increased to 10 nights compared with 9 nights in 2022. Visitors from Spain, Germany and Netherlands stayed the longest, while visitors from Burundi, Zambia, Kenya and Zimbabwe stayed the shortest. In Zanzibar, the overall average length of stay was 6 nights compared to 7 nights in 2022.

- v. Leisure and holidays, Visiting Friends and Relatives (VFR) and business continue to be the main purposes of visit to Tanzania. Visitors from long-haul source market such as the United States of America, Italy and Germany mostly came to Tanzania for leisure and holidays, while visitors from neighbouring countries like Kenya and Burundi came mainly for VFR as well as meetings and conferences.
- vi. A significant proportion of visitors to were under package tour arrangements, with the majority originating from the United States of America, Italy, and Spain. Visitors from neighboring countries ranked higher in non-package tour arrangements.
- vii. The majority of visitors to Tanzania were first-timers, mainly from Spain, France, Canada and the United States, while repeat visitors were primarily from the neighboring countries including Burundi, Zambia, Kenya, DRC and Uganda.
- viii. Friends and relatives continued to be the main source of information about destination Tanzania. Other important sources of information are websites, newspapers, magazines and trade advisory.

A number of activities and events took place in 2023 that have a positive bearing in the tourism industry include:

- i. Serengeti National Park securing the title of Africa's Leading National Park for the 5th consecutive year at the 2023 World Travel Awards.
- ii. Inauguration of the Zanzibar Tourism Investment and Travel Exhibition (ZTITE) by His Excellency Dr. Hussein Ali Mwinyi, the President of the Revolutionary Government of Zanzibar and Chairman of Revolutionary Council, focusing on promoting sustainable tourism.
- iii. Inauguration of the first Zanzibar Tourism Summit, providing a platform for stakeholders to network, promote and build long lasting business relationships with domestic, regional investors and international Travel Agents in the tourism industry.
- iv. Launching of Tanzania Association of Women Tour Operators (TAWTO), to promote gender mainstreaming in tourism.
- v. Tanzania's diplomatic mission in China organized a one – week tour for 14 leading companies in transporting tourists and six media from China with the aim of promoting destination Tanzania in China.

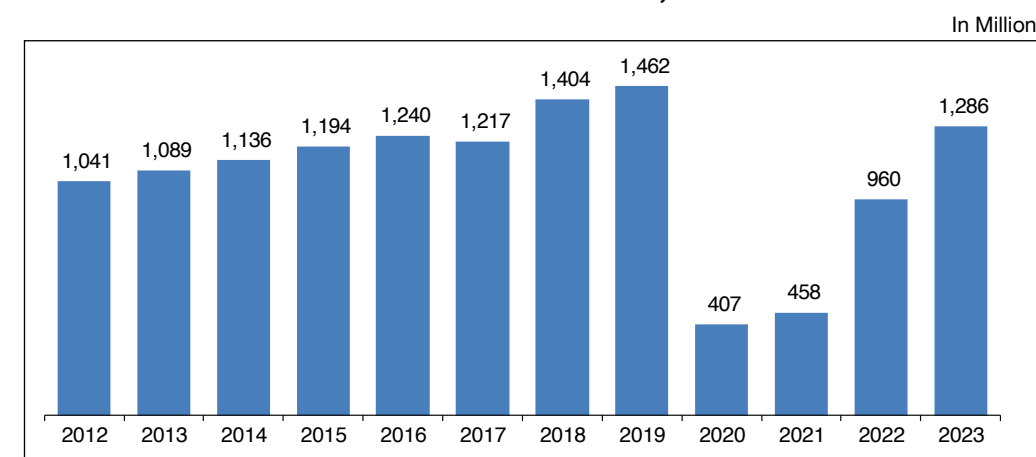
- vi. Recognition of Zanzibar as a top travel destination for 2023 by “Travelers Worldwide Magazine.”
- vii. Launching of new route between Lisbon International Airport (LIS) and Abeid Amani Karume International Airport (AAKIA) in Zanzibar. It is expected that the new route will open up the Portuguese tourism market and attract more visitors from other neighboring countries such as Greece and Spain.
- viii. Signing of a Memorandum of Understanding (MOU) between Tanzania Tourism Board (TTB) and Zanzibar Commission for Tourism (ZCT) to strengthen destination marketing.
- ix. Endorsement of the Tanzania Association of Tour Operators (TATO) as a new member by the World Tourism Organization (UNWTO). The endorsement is expected to create more regional and global visibility through the UN tourism networks and channels.
- x. Visits by several famous people including Barack Obama and Bill Gates; and celebrities, including Tyrese Darnel Gibson, Stephen Curry, Sanjay Dutt, Lupita Nyong’o, Will Smith, David Beckham, Mamadou Sakho, and Usher Raymond.

## Chapter 1: Recent Developments in the Tourism Industry

### 1.1 Global Perspective

In 2023, international tourism reached 88 percent of pre-pandemic levels, totaling 1.3 billion arrivals, according to the UNWTO World Tourism Barometer January 2024 report. The year was marked by ongoing recovery from the COVID-19 pandemic, with a focus on sustainability, technological advancements, and efforts to diversify destinations. Despite prevailing challenges, signs of recovery were evident, driven by collaborative efforts among stakeholders. Moreover, technology played a crucial role, facilitating digital innovation to enrich the travel experience and foster connectivity among stakeholders.

**Chart 1.1: Global International Tourist Arrivals, 2012-2023**



Source: UNWTO Barometer 2024 (January issue)

Looking at regions, global tourism experienced a robust recovery, led by the Middle East, which surpassed its pre-pandemic levels by 22 percent. Europe, the most visited region, reached 94 percent of pre-pandemic levels, driven by domestic and US tourists. Africa boasted a 96 percent recovery rate, signaling rising interest in its destinations. The Americas reached 90 percent of pre-pandemic levels, while Asia-Pacific region exhibited variations, with South Asia demonstrating strong performance due to reopening of several destinations, and slower recovery was observed in North-East Asia (**Table 1.1**). These trends collectively suggest a positive outlook for the global tourism economy, notwithstanding lingering challenges.

**Table 1.1: International Tourist Arrivals by Regions, 2019 – 2023**

Region	International Arrivals (Million)					Recovery from 2019 (%)
	2019	2020	2021	2022	2023	
World	1,462	407	458	960	1,286	88.0
Europe	742	240	301	597	700	94.3
East Asia and the Pacific	360	59	25	92	233	64.8
Americas	219	70	82	157	198	90.5
Africa	69	19	20	48	66	96.2
Middle East	71	19	30	68	87	122.2

Source: UNWTO World Tourism Organization Barometer, January 2024

The UNWTO Barometer showed that international tourism earnings rebounded significantly in 2023, reaching USD 1.4 trillion, equivalent to 93 percent of the pre-pandemic earnings in 2019. Total export revenues from tourism, also saw a substantial recovery, estimated at USD 1.6 trillion, nearly 95 percent of the earnings recorded in 2019.<sup>1</sup> Preliminary estimates indicate that tourism's economic contribution, measured in tourism direct gross domestic product (TDGDP), amounted to USD 3.3 trillion in 2023, representing 3 percent of the global GDP. This recovery was driven by robust domestic and international tourism, reflecting a positive trend in the tourism industry's economic impact.

## 1.2 Tanzania's Perspective

### 1.2.1 Tourism Performance:

The tourism industry is thriving and continue to be the key foreign exchange earner for the country. The tourism industry has been performing satisfactorily in the past five years, save for 2020, when the world was hit by COVID-19 pandemic. The number of international visitors increased by 24.3 percent to 1,808,205—record high—in 2023 from 1,454,920 recorded in 2022. Consistently, international tourism earnings increased to USD 3,373.8 million in 2023 from USD 2,527.8 million in 2022.

<sup>1</sup> Total export revenues from tourism include international earnings from tourism and passengers transport.

A number of activities and events took place in 2023 that have a positive bearing in the tourism industry including:

## 1. Activities

### a. Establishment of Zanzibar Tourism Investment and Travel Exhibition

His Excellency Dr. Hussein Ali Mwinyi, the President of the Revolutionary Government of Zanzibar and Chairman of Revolutionary Council officially launched the 2023 Zanzibar Tourism Investment & Travel Exhibition (ZTITE) on 9<sup>th</sup> February 2023. A three-day historic event (9-11 February 2023), was organized by Zanzibar Commission for Tourism in partnership with Zanzibar Investment Promotion Authority as well as the Department of Museum and Antiquity of the Ministry of Tourism and Heritage.



His Excellency, President of Zanzibar, Dr. Hussein Ali Mwinyi, the President of the Revolutionary Government of Zanzibar and Chairman of Revolutionary Council during the official launching of ZTITE

ZTITE focused on promoting sustainable tourism with its theme 'Greener Zanzibar' by showcasing its natural and cultural heritage, rich history, and potential for transformation into a sustainable tourist destination. Additionally, it aims to raise awareness about Zanzibar's green tourism aspirations and their implications for sustainable development.

#### b. Establishment of Zanzibar Tourism Summit



*Official opening of the Z-Summit 2023 by Dr Hussein Ali Mwinyi the President of Zanzibar and Chairman of the Revolutionary Council*

Zanzibar Tourism Summit is the first Tourism Expo in 2023 organized by Kilifair Promotion and ZATI. The Expo provides a platform for Zanzibar Tourism stakeholders to network, promote and build long lasting business relationships with domestic, East African investors and international Travel Agents in the tourism industry. The Expo took place from 23-24 February 2023 at Golden Tulip Zanzibar Airport Hotel – Zanzibar and His Excellency, The President of Zanzibar and Chairman of the Revolutionary Council, Dr Hussein Ali Mwinyi, officially opened the Z-Summit 2023. The Z-summit 2023 attracted over 100 exhibitors and 250 registered travel agencies from 23 countries. Theme of the Summit was sustainable tourism.

#### c. Promotion of Destination Tanzania in China

Tanzania's diplomatic mission in China in collaboration with Tanzania Tourism Board (TTB), Zanzibar Tourism Commission (ZTC) under the sponsorship of Air Tanzania Company limited (ATCL) and National Microfinance Bank (NMB) organized one week tour for 14 leading companies in transporting tourists and six media houses from China with the aim of attracting Chinese tourists in the country.



*A group of leading Chinese firms in Tanzania to explore opportunities*

The delegation of 40 members conducted meetings with tourism stakeholders and visited various tourism attractions in Zanzibar, Arusha and Dar es Salaam.

#### d. Introduction of New Airline Route



*Inauguration ceremony at AAKIA led by Hon. Mr. Simai Mohammed Said, Minister for Tourism and Heritage and Hon. Dr. Khalid Salum Mohammed, Minister for Transport of the Zanzibar Revolutionary Government*

With its sight set on transforming the tourism industry, Tanzania has opened a new chapter after setting a foot in the Portuguese market. The Portuguese airline launched a new route between Lisbon International Airport (LIS) and Abeid Amani Karume International Airport (AAKIA) in Zanzibar from 31<sup>st</sup> July 2023. It is expected that the new route will open up the Portuguese tourism market and attract more visitors from other neighboring countries such as Greece and Spain.

#### e. International Celebrities in Tanzania

In the tourism and hospitality sectors, celebrity endorsement has emerged as a compelling and effective marketing strategy due to its demonstrated efficacy in raising intention to travel to a destination and have a significant impact on consumer behavior. The top 15 celebrities who have visited the country recently include Tyrese Darnel Gibson, Stephen Curry, Sanjay Dutt, Lupita Nyong'o, Will Smith, Barrack Obama, David Beckham, Mamadou Sakho, Usher Raymond and Bill Gates. It is worth noting that, Tanzania is a popular tourist destination for global leaders, celebrities and influencers of international repute.

## 2. Events

### a. Tanzania Wins Eight Categories at World Travel Awards 2023



Serengeti National Park representative during the award giving ceremony at Atlantis Royal Hotel in Dubai

The Serengeti National Park in Tanzania has secured the title of Africa's Leading National Park category for the 5<sup>th</sup> consecutive year at the 2023 World Travel Awards. Among the nominees for the title were the Masai Mara National Reserve in Kenya, the Kruger National Park in South Africa, the Central Kalahari Game Reserve in Botswana, the Etosha National Park in Namibia, and the Kidepo Valley National Park in Uganda. Other categories won by Tanzania are: Leading Tourist Attraction (*Ngorongoro Conservation Area*); Tourist Board (*Tanzania Tourist Board*), Tour Operator (*Zara Tours*), Luxury Island (*Thanda Island*), and Luxury Tented Safari Camp (*Siringiti Serengeti Camp*), New Resort (*Emerald Zanzibar Resort and Spa*) and Responsible Tourism Award (*Twiga Tours*). The Ceremony took place at Atlantis Royal Hotel in Dubai, the United Emirates on 16<sup>th</sup> October 2023.

### b. Her Excellency, Dr. Samia Suluhu Hassan awarded Honorary Doctorate of Philosophy in Tourism Management and Marketing

The State University of Zanzibar (SUZA) conferred Her excellency, Dr. Samia Suluhu Hassan, the President of the United Republic of Tanzania with Honorary Doctorate Degree of Doctor of Philosophy in Tourism Management and Marketing (honoris causa) on 28<sup>th</sup> December 2023. The award is the result of her immense contribution in uplifting country's economy through tourism sector by pioneering the Royal Tour Documentary, which aimed at showcasing Tanzania's unique attractions in the global tourism market to attract more visitors and investment in tourism sector.



SUZA Chancellor, Dr. Hussein Ali Mwinyi conferred the honorary degree to Dr Samia Suluhu Hasssan during the 19<sup>th</sup> SUZA's graduation ceremony held in SUZA premises

**c. Tanzania Shines at International Tourism Exhibition in Berlin**



*Tanzania booth at ITB 2023*

Tanzania attended an International Tourism Exhibition in Berlin (ITB), and its booth attracted hundreds of tourists from Germany, travel agents and other tourism stakeholders in the World's largest annual tourism exhibition taking place in Berlin, Germany. The main focus for participating in ITB was to showcase the country's unique and breathtakingly tourist attractions. In this exhibition, Tanzania was crowned as Africa's Best Safari Destination. Tanzania was represented by more than eight Government institutions and 53 companies from the private sector, including tour operators and travel agencies; accommodation establishments and airline companies.

**d. Inaguration of Tanzania Women Tour Operators**

Women in tourism in Tanzania have launched their association dubbed Tanzania Association of Women Tour Operators (TAWTO), with its base in Arusha. TAWTO aims at promoting women's empowerment and take proactive steps to mainstream gender in tourism policies, planning and operations. TAWTO will also step-up efforts in promoting the tourism industry with a focus on conservation as well as encouraging women, especially young girls, to venture into the business by providing them with training on tourism and community development. The occasion took place on 14<sup>th</sup> April, 2023 at Grand Melia Hotel in Arusha and was officiated by Hon. Minister of Natural Resources and Tourism, Mr. Mohammed Mchengherwa.



*Hon. Minister of Natural Resources and Tourism, Mr. Mohammed Mchengherwa with other members of TAWTO during the opening ceremony at Grand Melia Hotel*

**e. Zanzibar Named Number One Summer Destination in Africa**

Travelers Worldwide Magazine has recognized Zanzibar as a top travel destination in 2023, listing the island as one of the top 15 best travel destinations in Africa. The magazine attributed the recognition to the island's unique history, which features a blend of Arab, Swahili, Indian, and Portuguese influences. Zanzibar has its own charm due to its historical background, with the combination of pristine white sandy and clear beaches.



While in Zanzibar, tourists can explore breathtaking African tourist spots such as the winding streets of Stone Town, the historic capital of Zanzibar, and they can even catch a glimpse of the archipelago's cultural heritage. The magazine identified, Zanzibar as one of the most rewarding tropical beach destinations in all of Africa to visit comparing it to the Maldives or Tahiti. Furthermore, the magazine mentioned three hotspots to stay on the island, which are the northern coastal paradise of Nungwi, the historical bustling town of Stonetown, and the kite-surfing and party-dominated coastal resort of Paje.

**f. Tanzania Tourism Board and Zanzibar Commission for Tourism signs MOU to Boost Tourism**

Tanzania Tourism Board and Zanzibar Commission for Tourism signed a Memorandum of Understanding (MOU) to strengthen destination marketing and boost tourism as well as developing a holistic campaign that delivers a stronger voice and country visibility. The two tourism organisations committed to promote Tanzania mainland and Zanzibar as a twin tourist destinations so that tourists visiting Zanzibar can as well visit Tanzania mainland to experience other unique attractions available in the country. The signing of MOU took place at AICC- Arusha on 28<sup>th</sup> August 2023 with the presence of members from both Ministries responsible for Tourism.



*Mr. Damas Mfugale, Managing Director of TTB and Ms. Aviwa Makame, Director of Human Resources, Planning and Administration of ZCT during the signing of MOU at AICC, Arusha*

**g. Cruise Ship M/S Zuiderdam Docks in Zanzibar**



*MS Zuiderdam while approaching the Zanzibar dock*

MS Zuiderdam Rotterdam cruise ship docked in Zanzibar on 14<sup>th</sup> November 2023 with over 1500, tourists and 781 crew members—making it the biggest ship of its kind to arrive in Zanzibar. MS Zuiderdam is equipped with a variety of amenities and facilities including restaurants and cafes, bars and lounges, a library, a theater and a nightclub, and children play area. The ship is known for its elegant design, comfortable accommodations, and excellent service. While in Zanzibar the tourists visited different tourist attractions including Prison Island, Stone Town, Jozani Forest and Spice Tours.

#### h. UNWTO endorsed TATO as a new affiliate member

The World Tourism Organisation (UNWTO) has endorsed the Tanzania Association of Tour Operators (TATO) as a new member, raising the profile of the country tourism high. TATO admission as an affiliate member to UNWTO was approved on 18<sup>th</sup> October 2023, during the 25<sup>th</sup> Session of the General Assembly, held in Samarkand, Uzbekistan. By joining UNWTO's membership TATO will be able to achieve regional and global visibility through the UN tourism networks and channels. UNWTO's membership include 159 countries, 6 associate members, 2 permanent observers and over 500 affiliate members representing the private sector, academic institution, tourism associations and local tourism authorities.



*TATO CEO's receiving the certificate being affiliate member of UNWTO*

## Chapter 2: Survey Results

### 2.1 Introduction

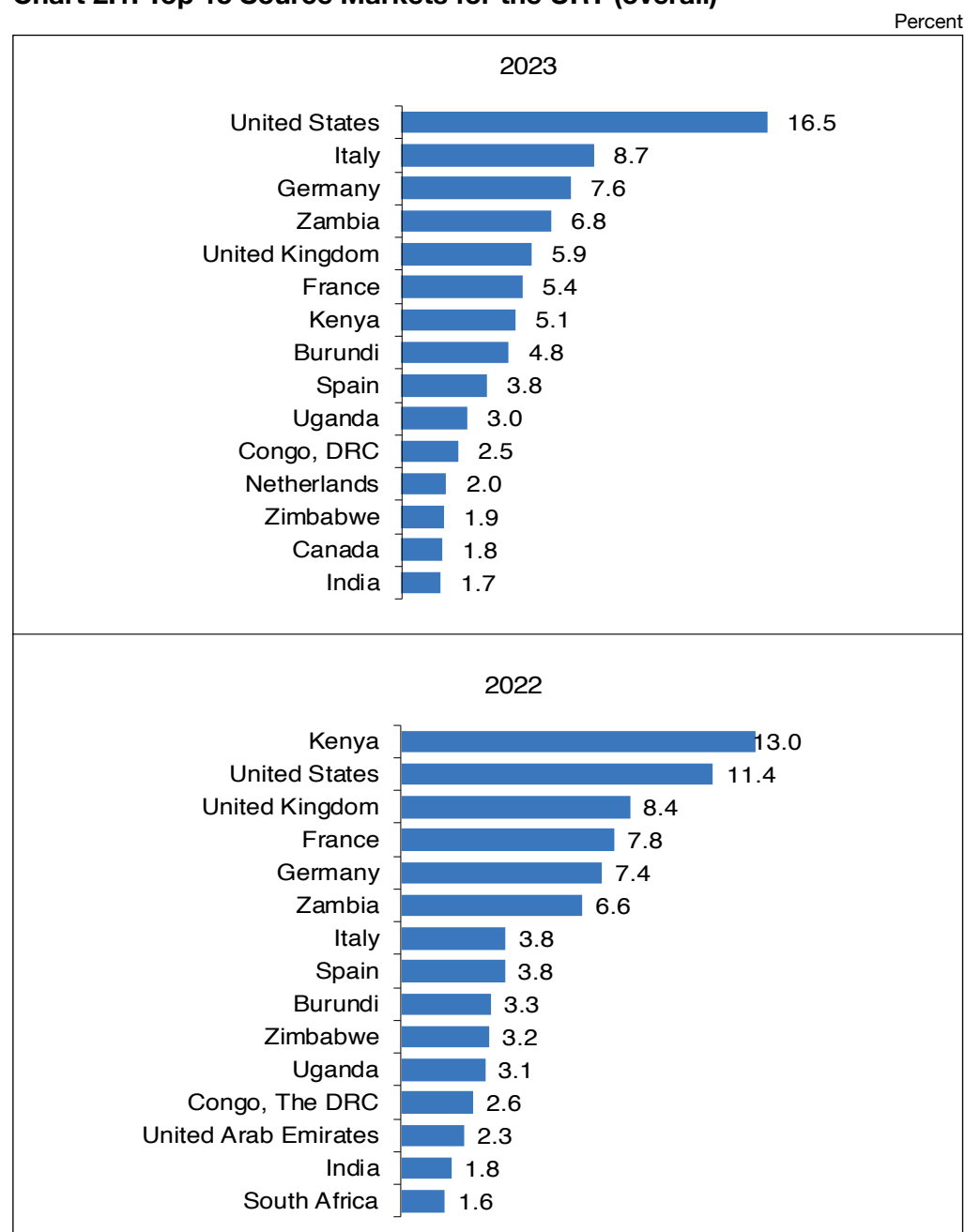
This section provides summary of key findings of the International Visitors Exit survey that was conducted during tourists' high peak season in August 2023. It covers information about tourists' demographic profiles, visitors' travel behaviour, expenditure pattern as well as experiences, satisfaction and recommendations of surveyed visitors. The survey covered 8 boarder points and managed to collect information from 12,372 visitors representing 123 countries.

### 2.2 Source Markets

International tourism in Tanzania continues to register steady growth with the number of international visitors surpassing pre-covid levels by far. According to Immigration data, the number of international visitors increased by 24.3 percent to 1,808,205 in 2023 compared to 1,454,920 visitors recorded in 2022.

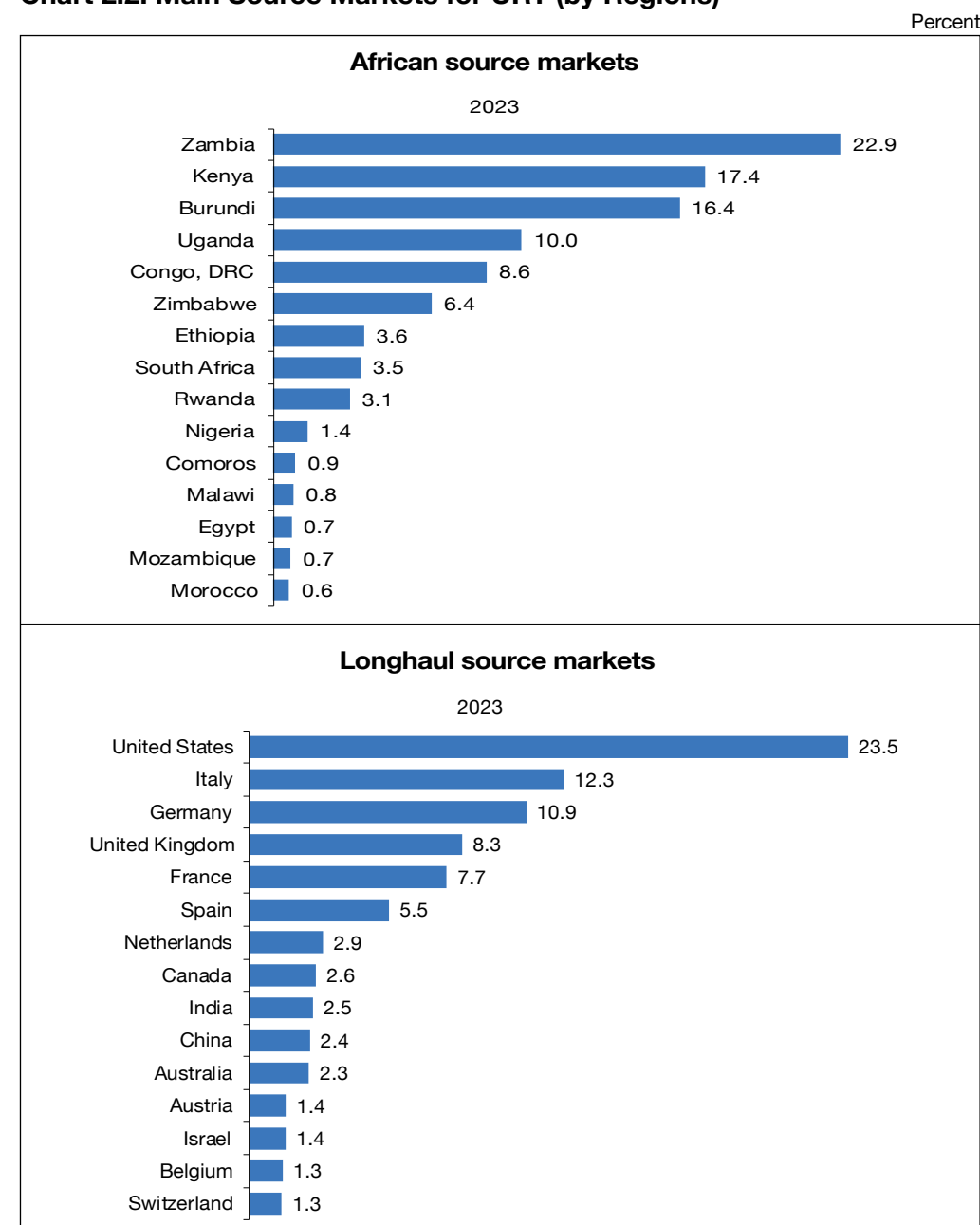
Results show that the leading source market for destination Tanzania were the United States of America, followed by Italy and Germany. The list of top 15 source markets remained broadly similar to that of 2022, constituting mainly traditional markets for destination Tanzania. Notably, Netherlands and Canada are new entrants in the list of top 15 source markets, replacing South Africa and the United Arab Emirates (**Chart 2.1**).

**Chart 2.1: Top 15 Source Markets for the URT (overall)**



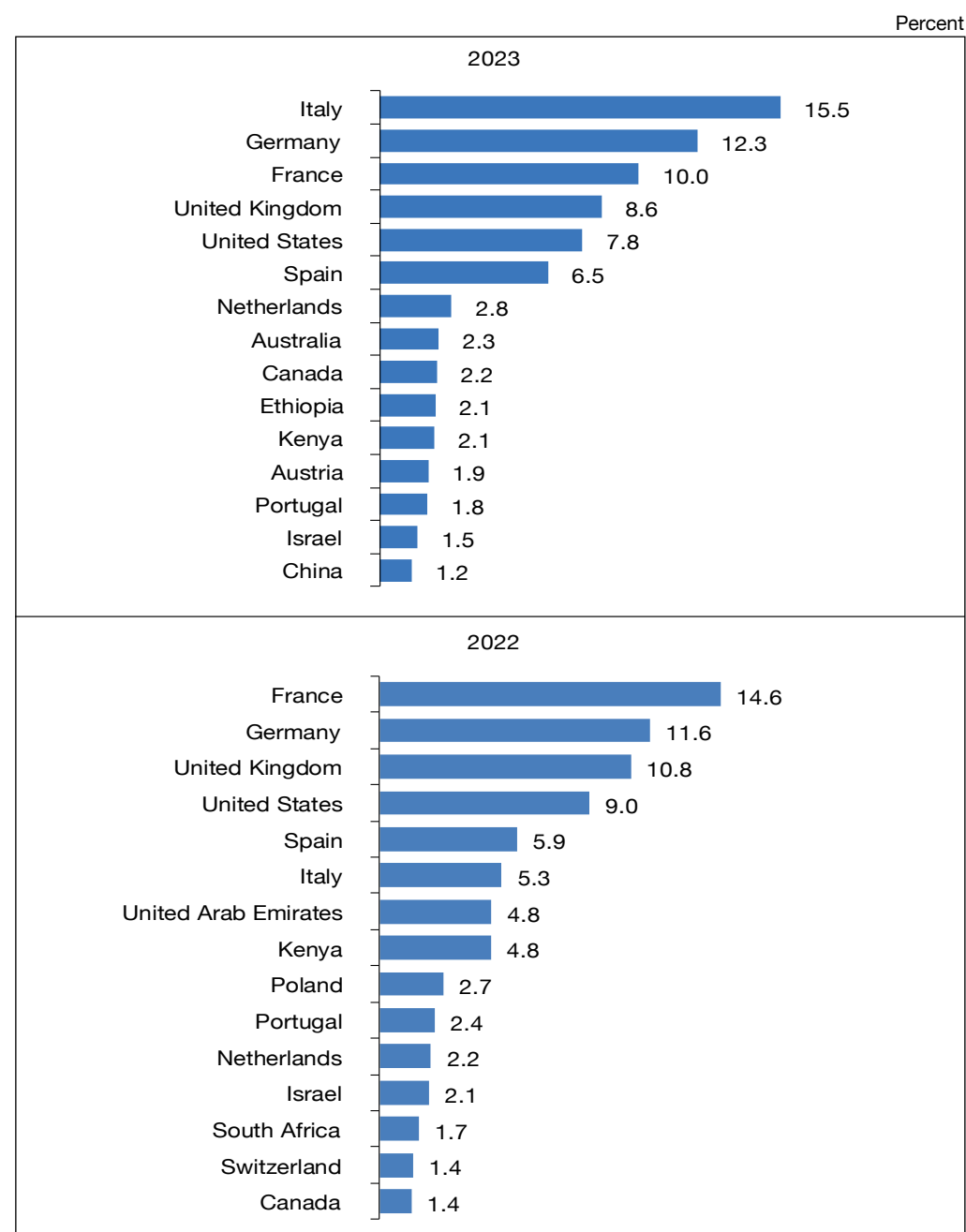
Regionwise, visitors from African countries mainly came from Zambia and Kenya, while those from other regions were dominated by the United States of America and Italy (**Chart 2.2**).

**Chart 2.2: Main Source Markets for URT (by Regions)**

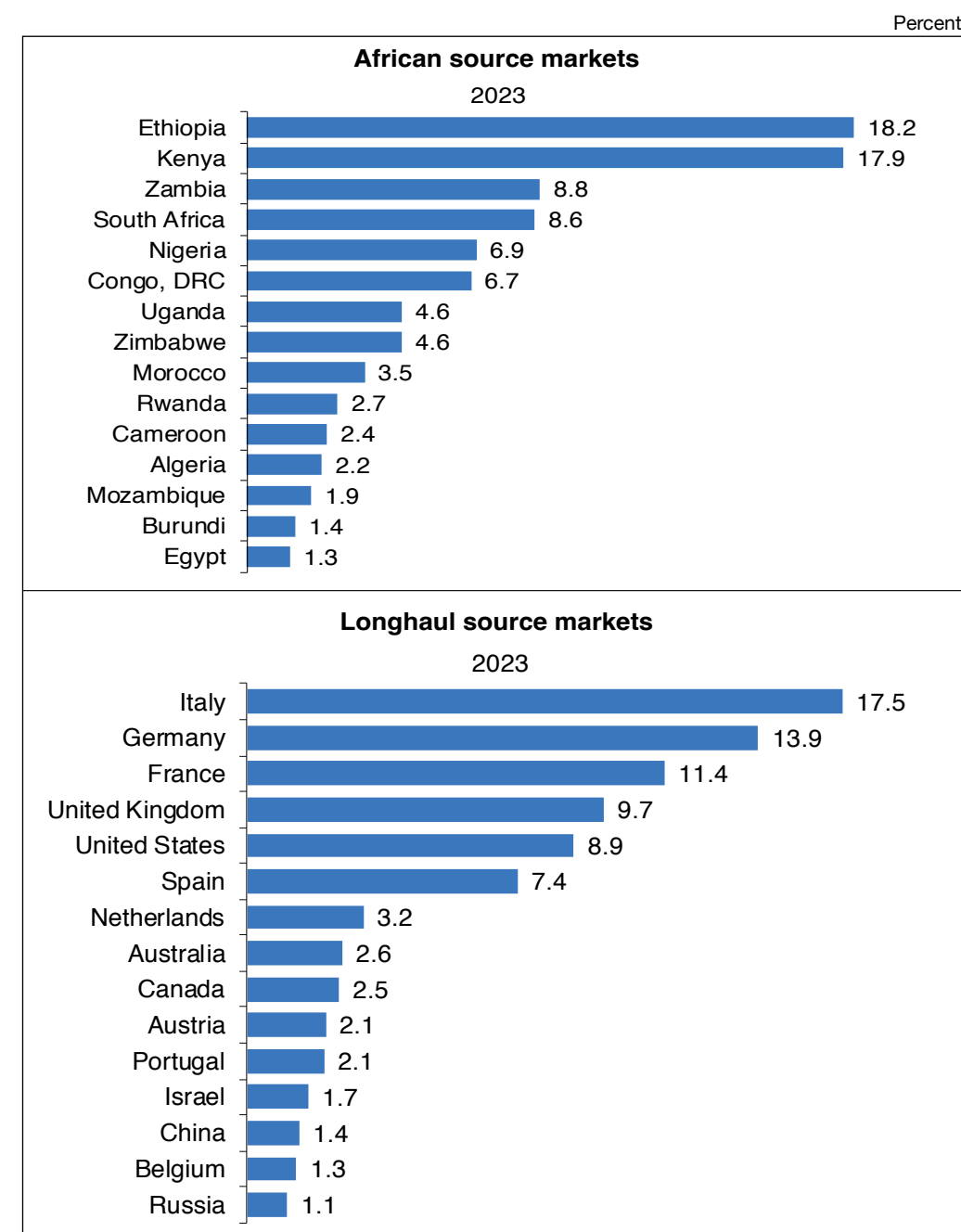


In Zanzibar, the list of the top 15 source markets accounted for about 78 percent of the total visitors. Italy has remarkably regained its first position after dropping from this position in 2016. Other important source markets included Germany, France and the United Kingdom (**Chart 2.3**). For the past three years, France has been the leading source markets for Zanzibar.

**Chart 2.3: Top 15 Source Markets for Zanzibar (overall)**



**Chart 2.4: Main Source Markets for Zanzibar (by Regions)**

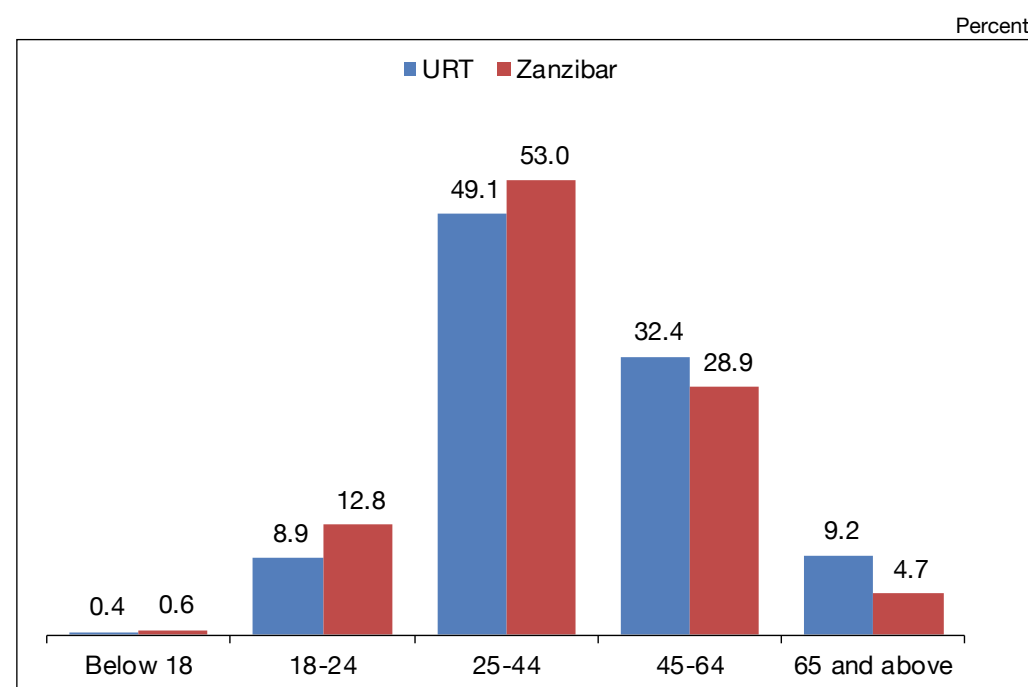


Majority of visitors from African source markets to Zanzibar were from Ethiopia and Kenya, supported by increased daily flights from these countries. Meanwhile, those from other regions were dominated by Italy and Germany (**Chart 2.4**).

## 2.3 Age Group

According to the survey findings, the proportion of visitors increased steadily with age up to 44 years old. However, beyond this age, the share of visitors began to decrease with advancing years. Visitors aged between 25 and 44 years constituted the majority, comprising nearly half of all visitors to URT and more than half to Zanzibar. Conversely, the percentage of visitors below 18 years old and senior citizens (aged 65 years and above) remained relatively low (**Chart 2.5**).

**Chart 2.5: Distribution of Visitors by Age Group**



The Survey results reveal that the majority of visitors from the United States of America, Italy, Zambia and Kenya fell within the age group of 25-44 years. Additionally, source markets such as the United States of America, Germany and Italy showed a notable presence of senior citizen visitors (**Table 2.1**).

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

Country of residence	Age group					Percent
	Below 18	18-24	25-44	45-64	65 and above	Total
United States	7.4	12.2	14.8	23.4	66.4	21.1
Italy	12.6	14.8	11.6	9.9	5.5	11.0
Germany	16.3	12.3	8.2	10.9	6.1	9.8
Zambia	2.5	3.0	10.6	11.3	1.4	8.6
United Kingdom	19.7	10.0	6.0	7.4	5.0	7.6
Kenya	2.5	6.5	10.9	4.4	0.6	7.1
France	12.1	10.4	7.3	5.7	1.6	7.0
Burundi	4.6	8.1	8.1	4.3	1.5	6.2
Spain	5.8	8.7	3.9	6.1	1.6	5.0
Uganda	3.0	2.8	5.4	2.7	0.8	3.8
Congo, DRC	6.2	1.4	3.7	3.6	0.5	3.3
Netherlands	3.6	5.0	1.9	3.0	1.4	2.6
Zimbabwe	1.2	1.0	3.6	1.7	1.0	2.4
Canada	1.9	2.1	1.9	2.9	3.1	2.3
India	0.7	1.7	2.1	2.7	3.6	2.3
Total	100	100	100	100	100	100

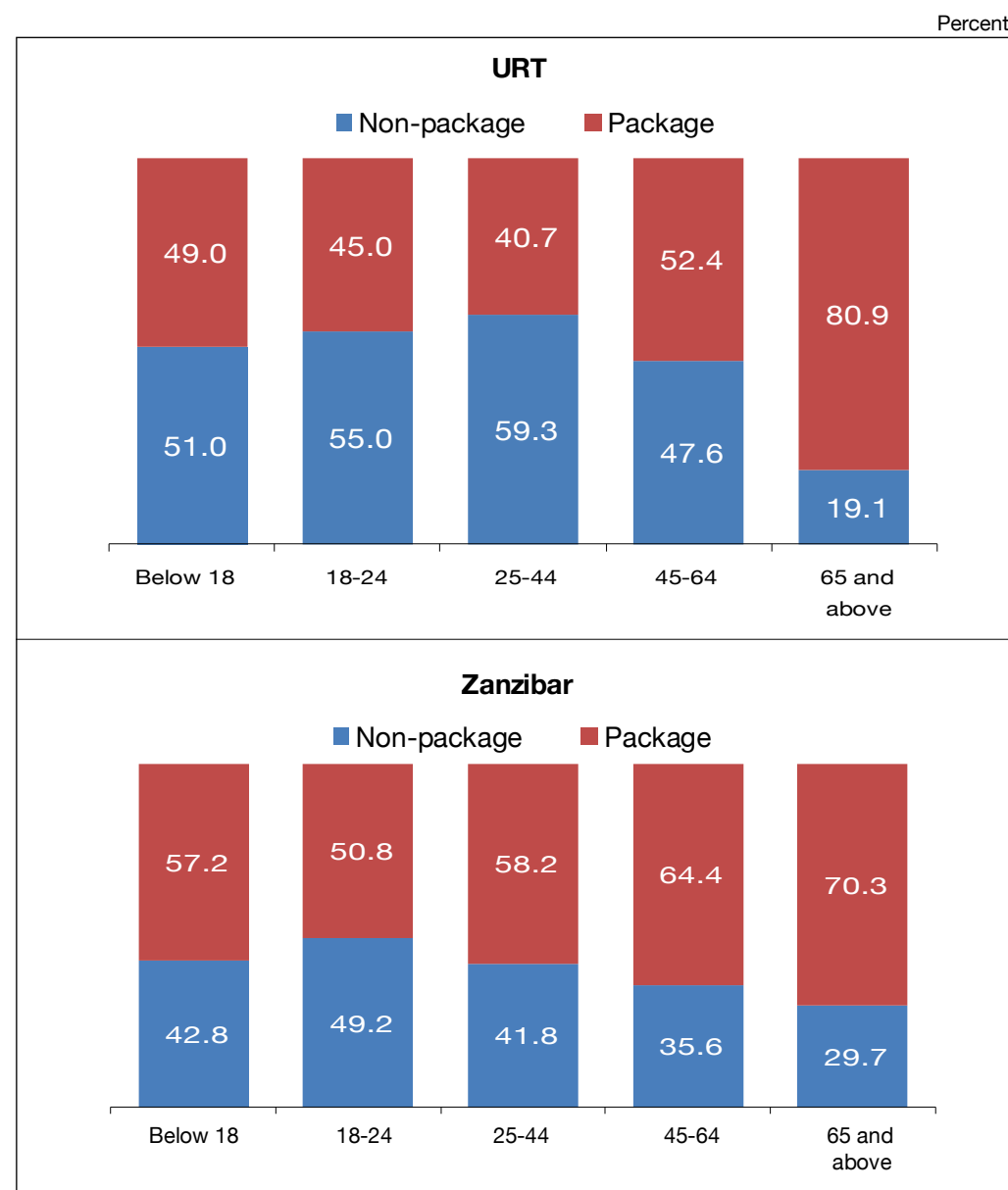
For Zanzibar, source markets such as Italy, Germany, France, the United States of America, and the United Kingdom stood out as dominant markets, with a substantial share of visitors falling within the under 25 to 44 age group. Notably, the United States of America, Germany, and Italy also exhibited a significant proportion of senior citizen visitors (**Table 2.2**).

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

Country of Residence	Age Group					Percent
	Below 18	18-24	25-44	45-64	65 and above	Total
Italy	17.4	17.9	22.7	16.9	10.8	19.5
Germany	19.9	13.7	14.0	18.9	11.4	15.7
France	15.8	14.6	13.6	10.8	5.4	12.9
United Kingdom	20.8	12.0	10.0	8.9	13.5	11.3
United States	4.8	7.4	10.5	11.1	22.2	10.1
Spain	4.3	11.2	7.6	10.7	4.3	8.4
Netherlands	3.7	5.3	2.7	4.5	1.6	3.6
Australia	1.8	2.8	3.3	2.0	6.5	2.9
Canada	1.4	2.5	2.5	3.2	7.0	2.8
Kenya	1.8	3.7	3.3	1.7	1.1	2.7
Austria	1.8	1.2	2.4	2.5	6.5	2.4
Portugal	2.1	3.3	2.1	2.2	2.7	2.3
Ethiopia	0.2	1.1	2.7	2.7	0.0	2.1
Israel	1.4	2.5	1.2	2.6	4.3	1.9
Belgium	3.0	0.9	1.5	1.2	2.7	1.5
Total	100	100	100	100	100	100

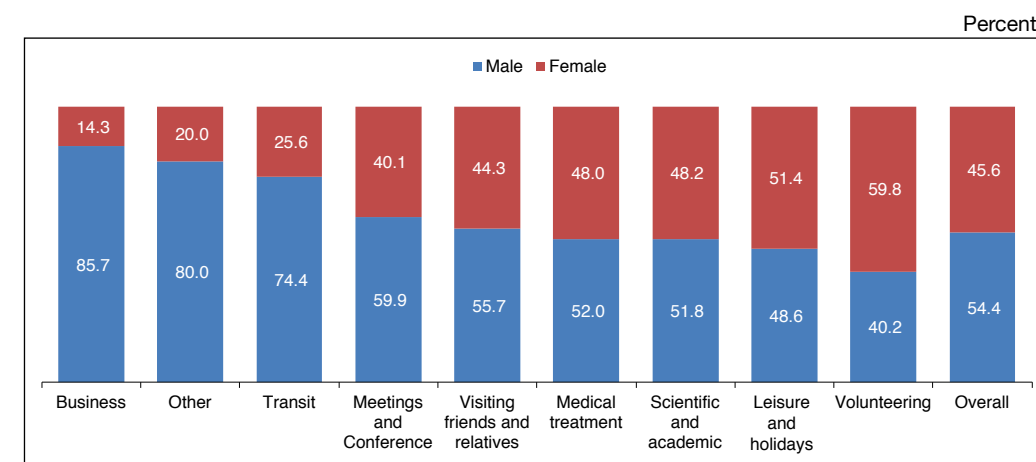
The majority of visitors to URT who are under 44 years old opt for non-package tour arrangements, indicative of their energetic and adventurous nature, likely to engage in various activities. Conversely, senior citizens tend to prefer the convenience of package tour arrangements. Meanwhile, in Zanzibar, the package tour arrangement is favored by the majority of visitors across all age groups (**Chart 2.6**).

**Chart 2.6: Age Group by Tour Arrangement**



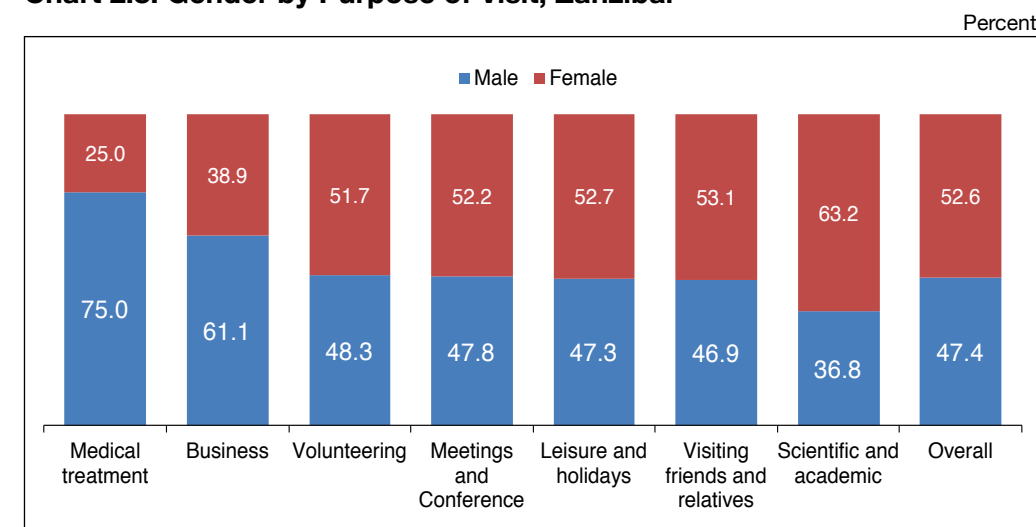
Majority of visitors to URT were male accounting for 54.4 percent of all visitors. Male visitors were predominant across most purposes of visit, except for those coming for Holidays and Volunteering, where female visitors took a lead (**Chart 2.7**).

**Chart 2.7: Gender by Purpose of Visit, URT**



In Zanzibar, over half of the visitors, accounting for 52.6 percent, were female. Female visitors dominated across most purposes of visit, except for business, medical treatment, transit, and religious purposes, where male visitors took the lead (**Chart 2.8**).

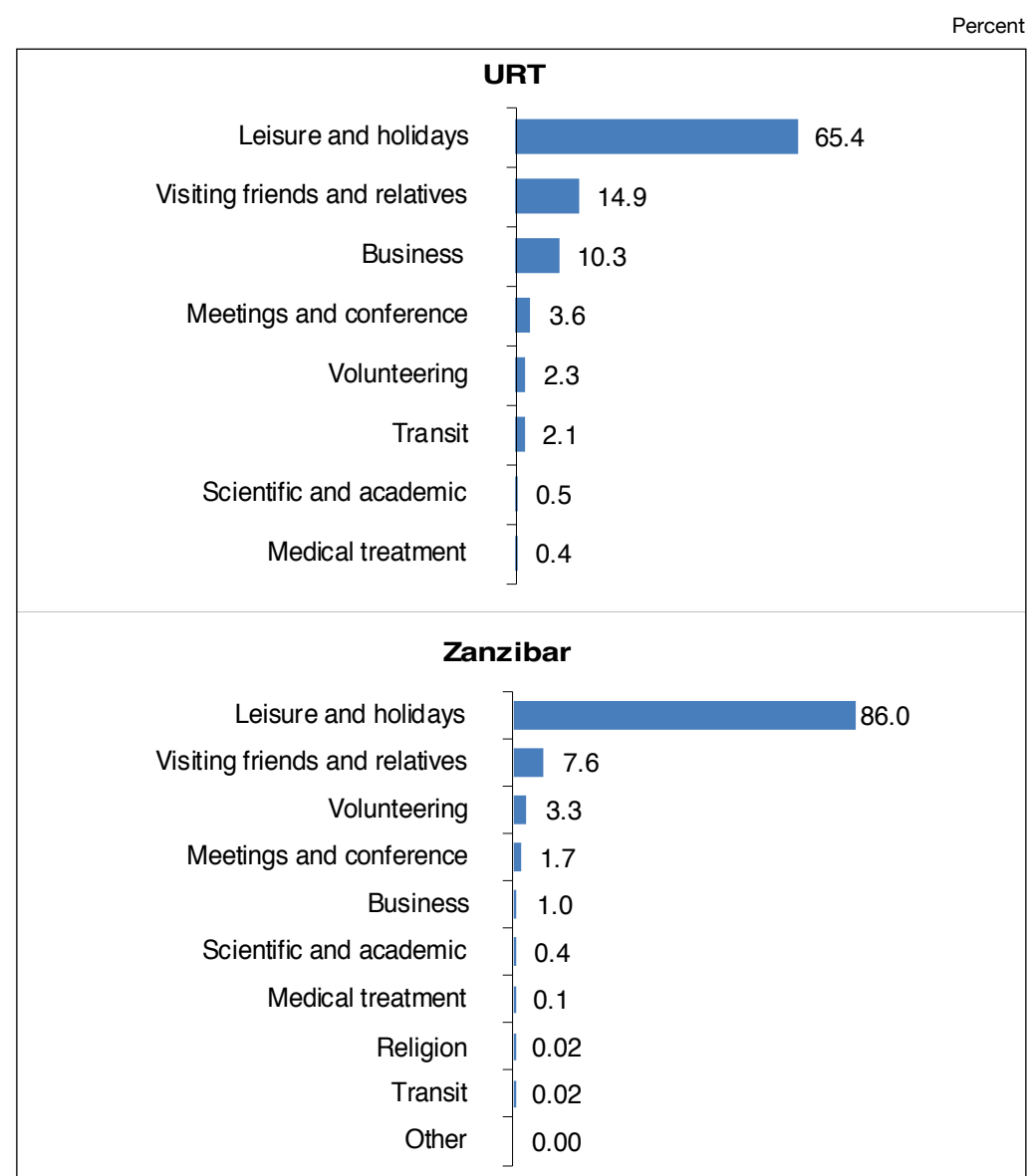
**Chart 2.8: Gender by Purpose of Visit, Zanzibar**



## 2.4 Purpose of Visit

The main purposes of visit to both URT and Zanzibar remained consistent with the past two years, were leisure and holidays, visiting friends and relatives, and business ranked as the main reasons (**Chart 2.9**). The standing out of leisure and business visitors, underscores the ongoing efforts by the Government to promote tourism and enhance trade and investment opportunities in Tanzania.

**Chart 2.9: Purpose of Visit**



Visitors from long haul source markets such as the United States of America, Italy and Germany mostly travelled to the United Republic of Tanzania for leisure and holidays. Conversely, visitors from Kenya and Burundi predominantly arrived to visit friends and relatives, as well as attend meetings and conferences. Business visitors were largely from Zambia, Zimbabwe, and Democratic Republic of Congo. Noteworthy, a significant number of visitors from Burundi and the Democratic Republic of Congo also came for medical treatment (**Table 2.3**).

**Table 2.3: Visitors from Top 15 Source Markets by Purpose of Visit for URT**

Percent

Country of residence	Leisure and holidays	Volunteering	Religion	Scientific and academic	Visiting friends and relatives	Meetings and conference	Business	Transit	Medical treatment	Other	Grand Total
United States	22.8	18.2	17.9	7.1	4.7	3.8	1.9	1.6	0.0	19.0	16.5
Italy	12.2	8.4	0.0	16.1	2.3	1.1	0.6	0.4	0.0	0.0	8.7
Germany	9.8	13.3	2.6	5.4	4.9	2.7	0.3	0.4	0.0	0.0	7.6
Zambia	0.8	0.0	25.6	0.0	3.1	5.8	43.9	44.5	8.0	0.0	6.8
United Kingdom	6.6	3.8	2.6	1.8	8.1	4.0	0.9	1.6	0.0	0.0	5.9
France	7.4	4.9	0.0	3.6	2.2	1.8	0.2	0.0	8.0	0.0	5.4
Kenya	1.7	0.3	5.1	8.9	15.0	27.7	3.5	15.7	4.0	23.8	5.1
Burundi	0.2	0.0	17.9	0.0	25.7	1.3	3.3	9.4	46.0	38.1	4.8
Spain	5.1	5.2	0.0	1.8	2.3	0.0	0.2	0.0	0.0	0.0	3.8
Uganda	0.7	0.0	5.1	7.1	7.6	6.4	8.7	7.5	2.0	19.0	3.0
DRC Congo	0.8	0.0	12.8	1.8	5.5	1.1	9.9	3.9	10.0	0.0	2.5
Netherlands	2.7	3.1	0.0	5.4	0.5	2.4	0.0	0.4	0.0	0.0	2.0
Zimbabwe	0.5	0.0	0.0	0.0	0.5	2.4	12.8	2.8	0.0	0.0	1.9
Canada	2.5	0.7	0.0	0.0	0.8	0.7	0.2	2.0	0.0	0.0	1.8
India	1.7	0.3	2.6	1.8	1.6	2.0	2.5	0.0	0.0	0.0	1.7
Other	24.6	41.6	7.7	39.3	15.3	36.8	11.1	9.8	22.0	0.0	22.3
Total	100	100	100	100	100	100	100	100	100	100	100

In Zanzibar, the majority of visitors from Italy, Germany and France came for leisure and holidays. The United Kingdom took the lead in bringing tourists who came to visit friends and relatives. The majority of business visitors were from the United States, Italy and Kenya (**Table 2.4**).

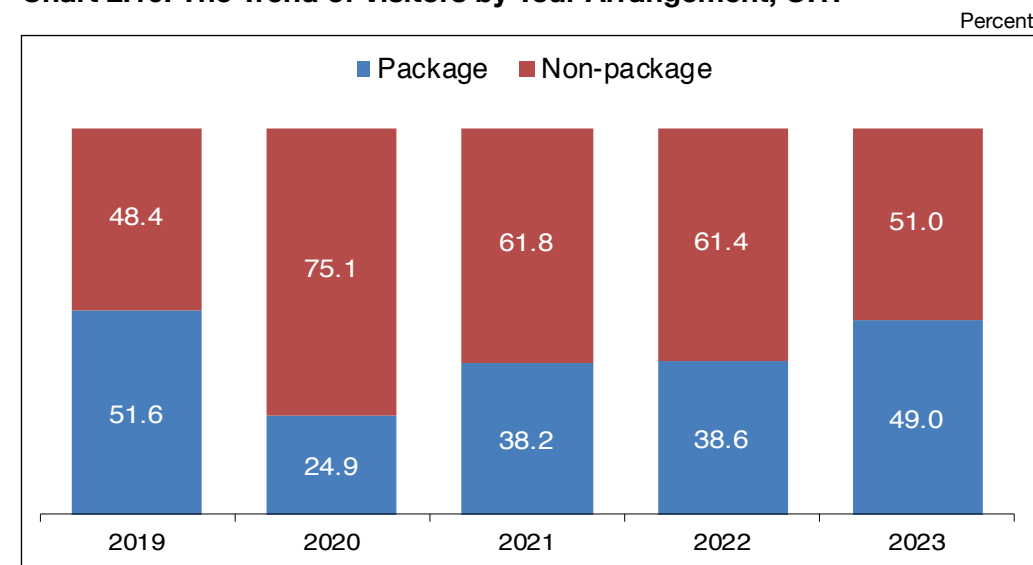
**Table 2.4: Visitors from Top 15 Source Markets by Purpose of Visit for Zanzibar**

Country of residence	Percent						
	Leisure and holidays	Business	Scientific and academic	Visiting friends and relatives	Meetings and conference	Volunteering	Other
Italy	17.1	13.0	15.8	5.2	4.4	4.6	0.0
Germany	12.8	1.9	0.0	8.7	8.9	13.8	0.0
France	10.7	1.9	10.5	6.5	2.2	7.5	0.0
United Kingdom	7.6	3.7	0.0	24.1	4.4	2.3	0.0
United States	8.3	14.8	5.3	5.0	6.7	2.3	0.0
Spain	6.5	0.0	0.0	8.9	0.0	5.7	0.0
Netherlands	2.9	0.0	5.3	1.0	1.1	4.6	0.0
Australia	2.4	1.9	0.0	1.2	0.0	2.3	0.0
Canada	2.4	0.0	0.0	1.5	0.0	1.1	0.0
Ethiopia	0.9	3.7	0.0	0.7	4.4	37.4	0.0
Kenya	1.7	7.4	0.0	6.0	7.8	0.0	0.0
Austria	2.1	0.0	15.8	0.5	0.0	0.6	0.0
Portugal	2.1	0.0	0.0	0.0	0.0	0.0	0.0
Israel	1.3	0.0	0.0	0.0	22.2	0.0	0.0
China	1.3	1.9	0.0	1.2	0.0	0.6	16.7
Other	20.0	50.0	47.4	29.5	37.8	17.2	83.3
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0

## 2.5 Travel Arrangement

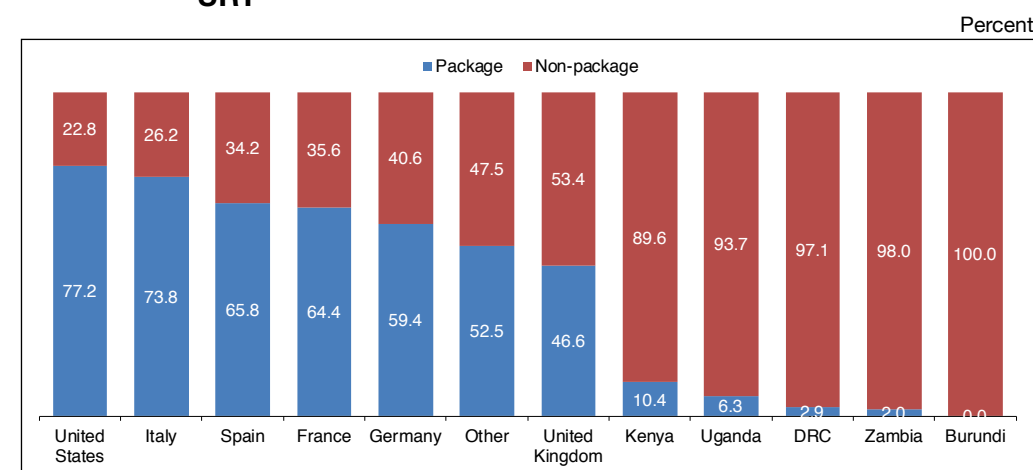
Over the past three years, the majority of visitors opted for non-package tour arrangements. However, in 2023, there was a decrease in the proportion of visitors using non-package tours to 51 percent, down from 61.4 percent in 2022. Conversely, there was 11.6 percent increase in number of visitors using package tour arrangements compared to 2022 (**Chart 2.10**). This shift is attributed to the preference of visitors from long-haul destinations for package tour arrangements (**Chart 2.11**).

**Chart 2.10: The Trend of Visitors by Tour Arrangement, URT**



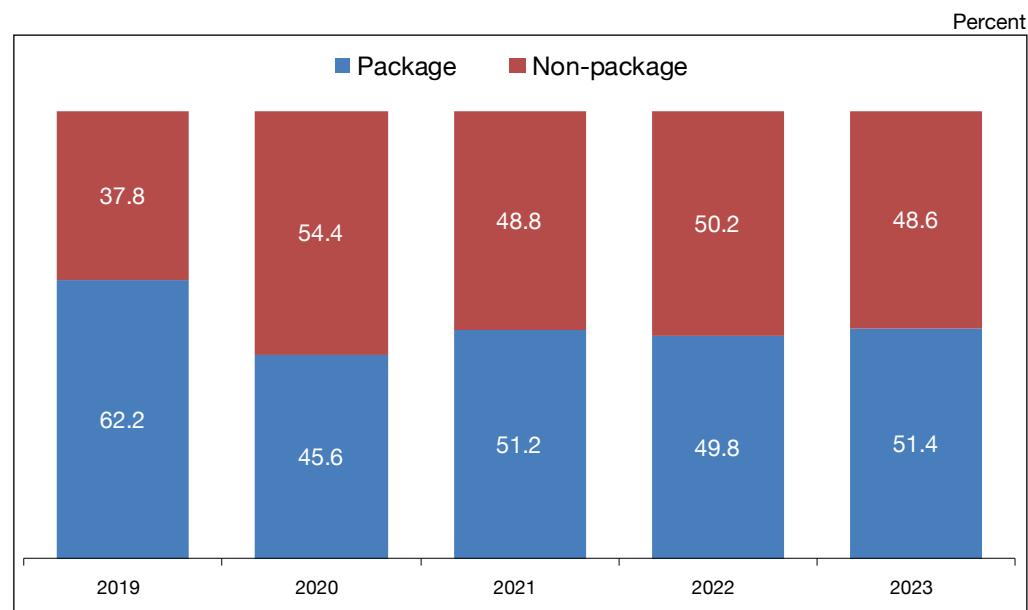
A larger proportion of visitors who came under the package tour arrangement were from the United States of America, Italy and Spain. Visitors from the neighboring countries such as Burundi, Zambia, and DRC ranked higher in the non-package tour arrangement (**Chart 2.11**).

**Chart 2.11: Visitors From Top 15 Source Markets by Tour Arrangement, URT**



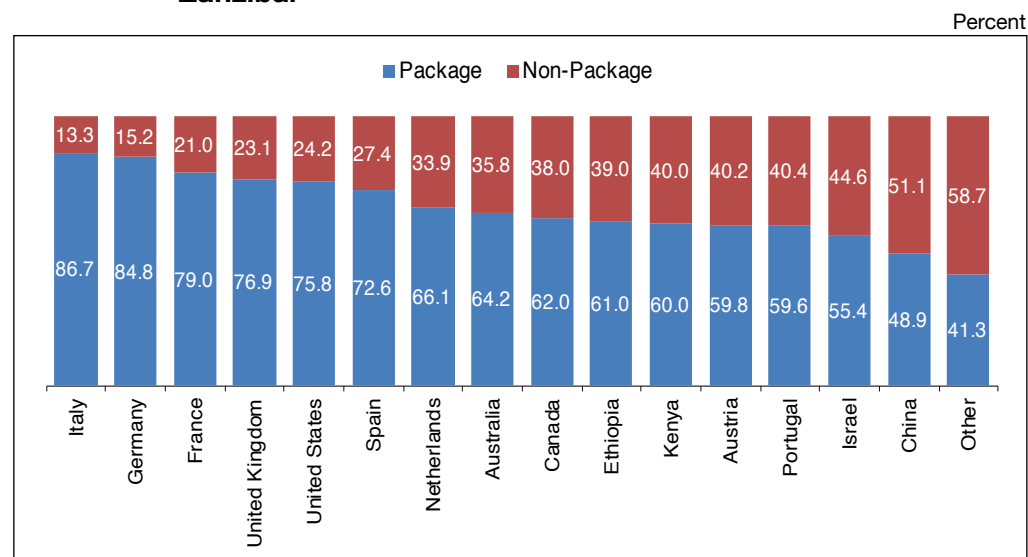
Meanwhile, in Zanzibar the trend of visitors indicate that the majority of visitors arrived under the package tour arrangement except for 2020 and 2022 (**Chart 2.12**).

**Chart 2.12: Visitors by Tour Arrangement, Zanzibar**



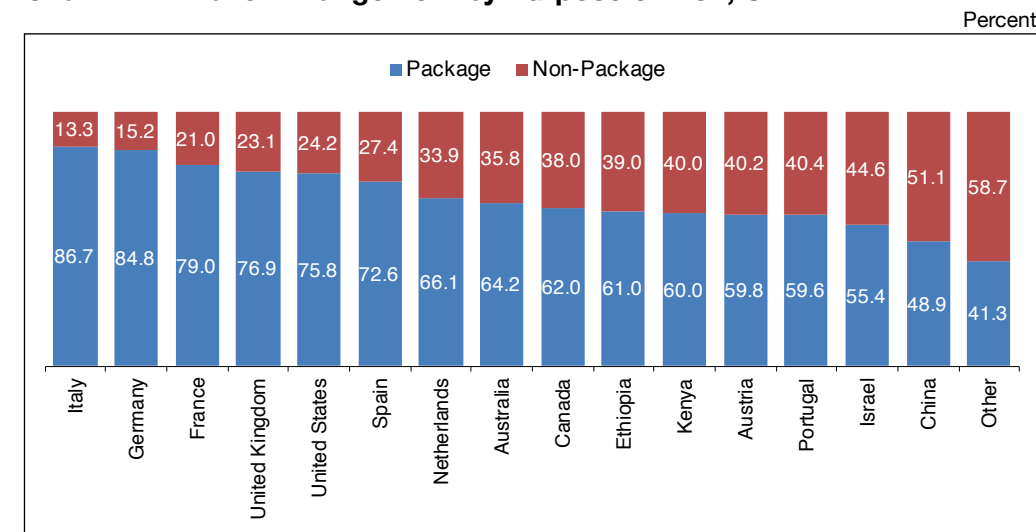
Furthermore, majority of visitors from Portugal, China and Austria came under the package tour arrangement while visitors from Kenya, the United Kingdom and United States came under the non-package tour arrangement (Chart 2.13).

**Chart 2.13: Visitors From Top 15 Source Markets by Travel Arrangement, Zanzibar**

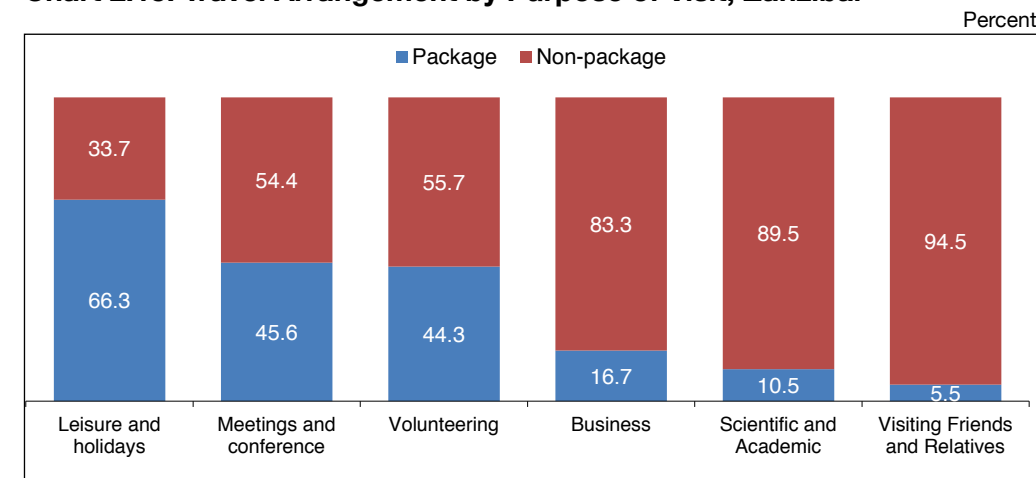


In the URT, visitors who came under the non-package tour arrangement dominated in all purposes except those who came for leisure and holidays (Chart 2.14). The same pattern is observed for Zanzibar as indicated (Chart 2.15).

**Chart 2.14: Travel Arrangement by Purpose of Visit, URT**



**Chart 2.15: Travel Arrangement by Purpose of Visit, Zanzibar**



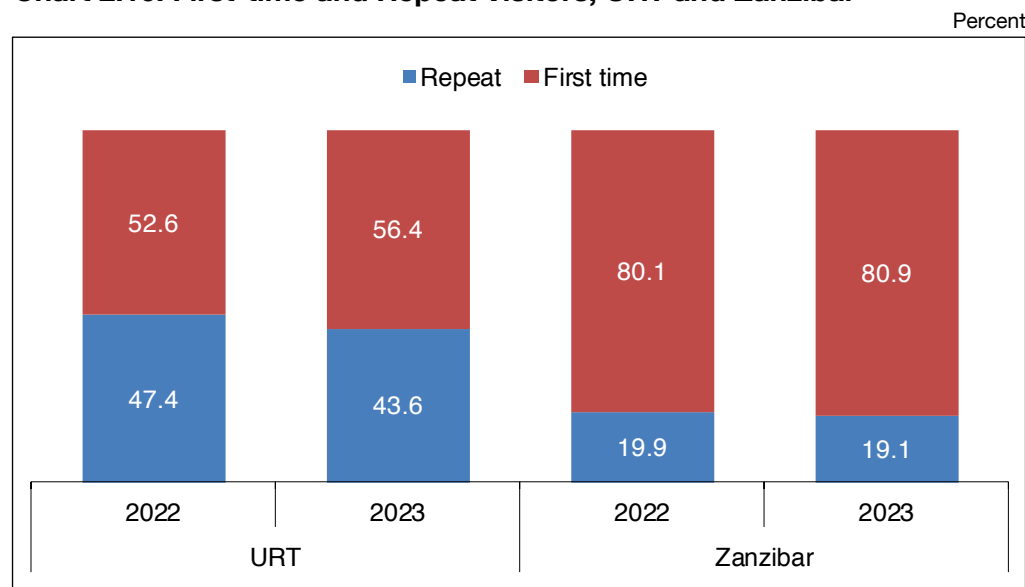
Overall, and for the past 2 to 3 years, the data shows that visitors from various countries exhibit distinct preferences regarding travel arrangements. Recently, there has been a surge in new visitors and an increased number of visitors particularly from the United States of America, United Kingdom, France,

Germany and Italy who are coming for leisure and holidays. Conversely, Zambia and Zimbabwe visitors predominantly arrive for business purposes and visiting relatives.

## 2.6 First-time and Repeat Visits

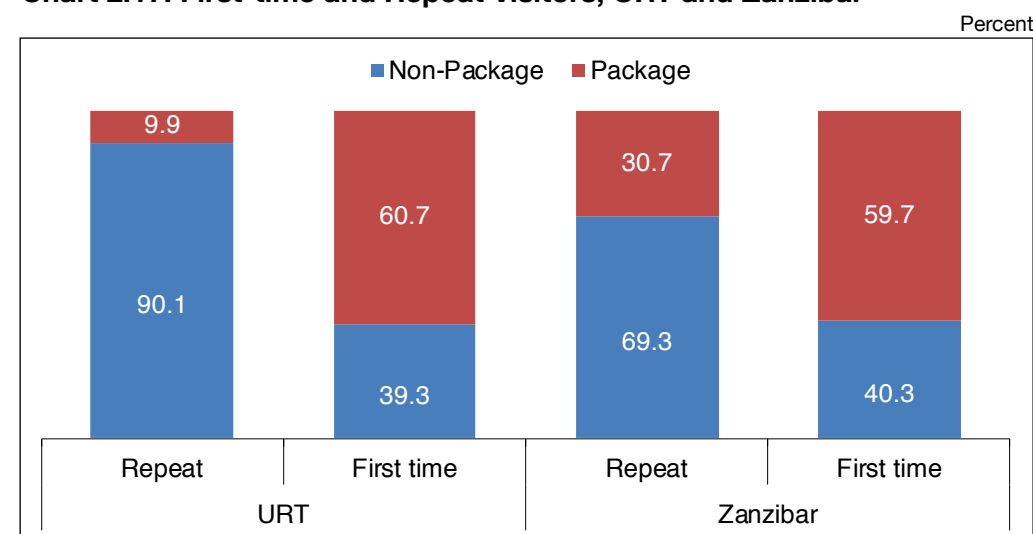
In 2023, over half of the surveyed visitors in URT were first timers, while in Zanzibar, over 80 percent were first-timers. The similar pattern was observed in 2022 in both URT and Zanzibar (**Chart 2.16**).

**Chart 2.16: First-time and Repeat Visitors, URT and Zanzibar**



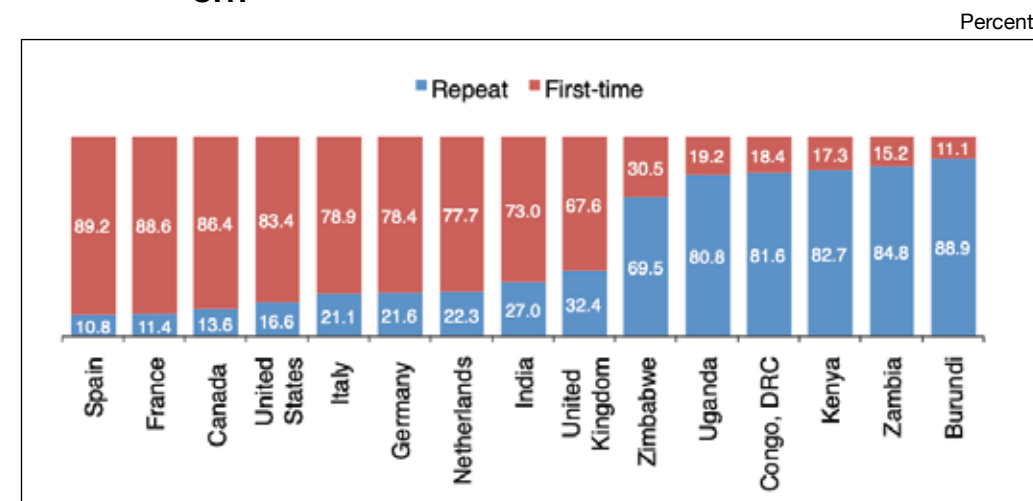
In URT, about 90 percent of repeat visitors used the non-package tour arrangement while about 61 percent of first time visitors preferred the package tour arrangement. In Zanzibar, 69.3 percent of repeat visitors preferred non-package and 59.7 percent of first time visitors came under package tour arrangements (**Chart 2.17**). Notably, the majority of repeat visitors favored non-package arrangements, likely due to their familiarity with the destination.

**Chart 2.17: First-time and Repeat Visitors, URT and Zanzibar**



**Chart 2.18** indicates that the majority of visitors from the top 15 source markets to URT were first-time visitors, particularly from Spain, France, Canada, and the United States of America. Conversely, visitors from neighbouring countries such as Burundi, Zambia, Kenya, DRC, and Uganda primarily brought repeat visitors. This trend is linked to strong hospitality, business connections, and family ties with Tanzania.

**Chart 2.18: First-time and Repeat Visitors by Top 15 Source Markets, URT**



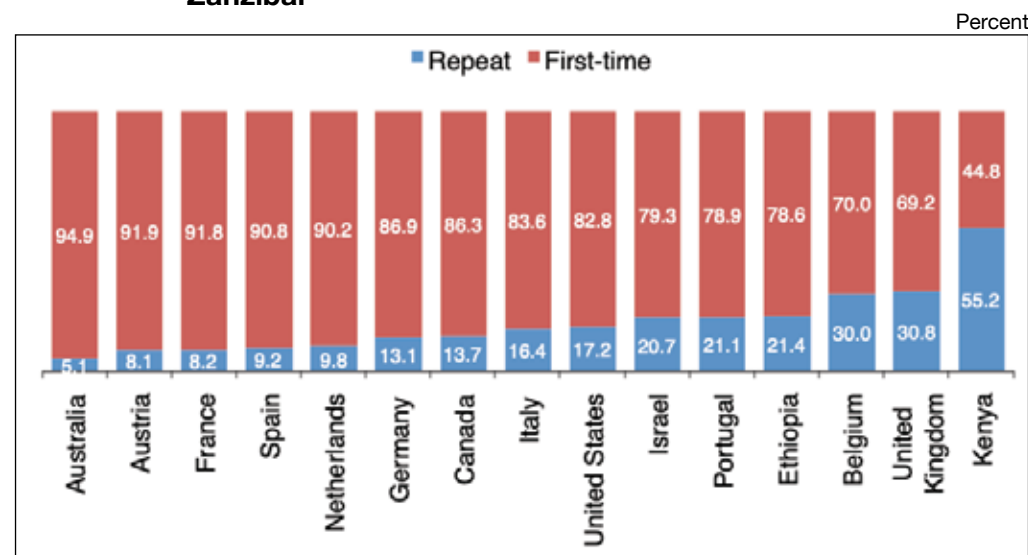
The main purposes of visit for majority of first time visitors were leisure and holidays while repeat visitors were mostly visiting friends and relatives as well as engaged in business activities (Table 2.5).

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

Purpose of visit	First-time visitors	Repeat visitors
Leisure and holidays	80.2	19.3
Visiting friends and relatives	6.7	35.8
Business	5.2	30.3
Meetings and conference	3.3	7.3
Volunteering	2.6	0.6
Transit	1.0	3.7
Scientific and academic	0.7	0.7
Religion	0.3	0.8
Medical treatment	0.1	1.1
Other	0.1	0.3
Total	100	100

Majority of tourists who visited Zanzibar from the top 15 source market were first-time visitors mainly from Australia, Austria, France, Spain and Netherlands while most of repeat visitors came from Kenya (Chart 2.19).

**Chart 2.19: First-time and Repeat Visitors by Top 15 Source Markets, Zanzibar**



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

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

Purpose of visit	First-time visitors	Repeat visitors
Leisure and holidays	89.8	56.6
Visiting friends and relatives	3.5	29.6
Volunteering	3.4	1.2
Meetings and conference	1.7	4.4
Business	0.9	6.7
Scientific and academic	0.5	0.7
Medical treatment	0.1	0.7
Other	0.1	0.2
Total	100	100

## 2.7 Source of Information

The trend in the sources of information about Tanzania shows that over 40 percent of visitors learned about Tanzania through travel agents and tour operators, contrasting with the past three years where friends and relatives served as the primary source of information. Additionally, some visitors discovered about Tanzania through websites, newspapers, magazines and trade advisories (Table 2.7).<sup>2</sup>

**Table 2.7: Source of Information about Destination Tanzania**

	2019	2020	2021	2022	2023
Friends and relatives	38.3	57.5	42.6	43.6	40.0
Travel agent, tour operator	51.1	23.9	28.7	34.0	41.8
Internet/websites	3.1	8.7	19.8	9.5	5.9
Travel advisory	2.8	2.3	1.4	2.0	2.1
Newspaper, magazines, brochures	2.9	3.0	1.0	1.8	3.5
Tanzania missions abroad	0.3	0.3	0.3	0.6	0.7
Trade fair	0.6	1.2	0.6	0.5	0.4
Inflight magazines	0.4	0.3	0.4	0.4	0.3
Others	0.9	2.8	5.3	6.9	5.3
	100	100	100	100	100

<sup>2</sup> Travel advisory is a formal written notice issued by the Government agency to advise travelers about the safety of foreign country or destination.

## 2.8 Travel Party

In 2023, visitors who travelled alone continued to be the most prominent, maintaining the trend of the past four years. Those who visited with their spouses ranked second, followed by those who travelled with friends and relatives. Conversely, visitors who came with parents were the least common. In Zanzibar, visitors who travelled with their spouse dominated in 2023, consistent with the pattern observed in the past four years, while visitors who travelled with parents remained the least common (**Table 2.8**).

**Table 2.8: Travel party, URT and Zanzibar**

	Percent				
URT	2019	2020	2021	2022	2023
Alone	52.0	66.3	34.8	32.9	32.1
With spouse	19.3	17.2	32	26.0	26.4
With other friends and relatives	12.8	11.8	25	25.3	22.0
With spouse and children	8.9	1.8	3.7	9.3	13.4
With children	4.4	2.9	2.7	3.9	4.2
With parents	2.6	0	1.8	2.6	1.8
Total	100	100	100	100	100

Zanzibar	2019	2020	2021	2022	2023
With spouse	31.2	42.3	52.8	39.9	36.2
Alone	26.2	34	9.4	10.1	11.7
With other friends and relatives	17.7	16.6	28.2	25.8	24.0
With spouse and children	15.3	3.4	5.1	15.3	20.8
With children	5.7	3.8	2.3	4.9	4.5
With parents	3.9	0	2.2	4.1	2.8
Total	100	100	100	100	100

In URT the result shows that majority of visitors under all travel parties came for leisure and holidays followed by those who travelled to visit friends and relatives (**Table 2.9**)

**Table 2.9. Distribution of Travel Party and Purpose of Visit, URT**

	Percent					
Purpose of visit	Alone	With children	With other friends and relatives	With parents	With spouse and children	With spouse
Business	25.7	2.7	6.9	1.8	0.5	1.2
Leisure and holidays	31.2	62.5	67.6	85.8	86.0	93.2
Medical treatment	0.7	1.2	0.3	0.0	0.4	0.0
Meetings and conference	7.8	0.4	3.8	0.0	0.5	1.0
Scientific and academic	1.0	0.0	0.3	0.0	0.2	0.1
Transit	3.3	0.0	4.0	0.0	0.4	0.2
Visiting friends and relatives	27.5	32.5	10.0	12.4	11.3	3.3
Volunteering	1.9	0.8	6.4	0.0	0.6	0.8
Other	0.9	0.0	0.8	0.0	0.0	0.1
Total	100	100	100	100	100	100

In Zanzibar, similar pattern was observed whereby leisure and holiday's purpose was dominant under all parties followed by visitors who came to visit friends and relatives (**Table 2.10**).

**Table 2.10: Distribution of Travel Party and Purpose of Visit, Zanzibar**

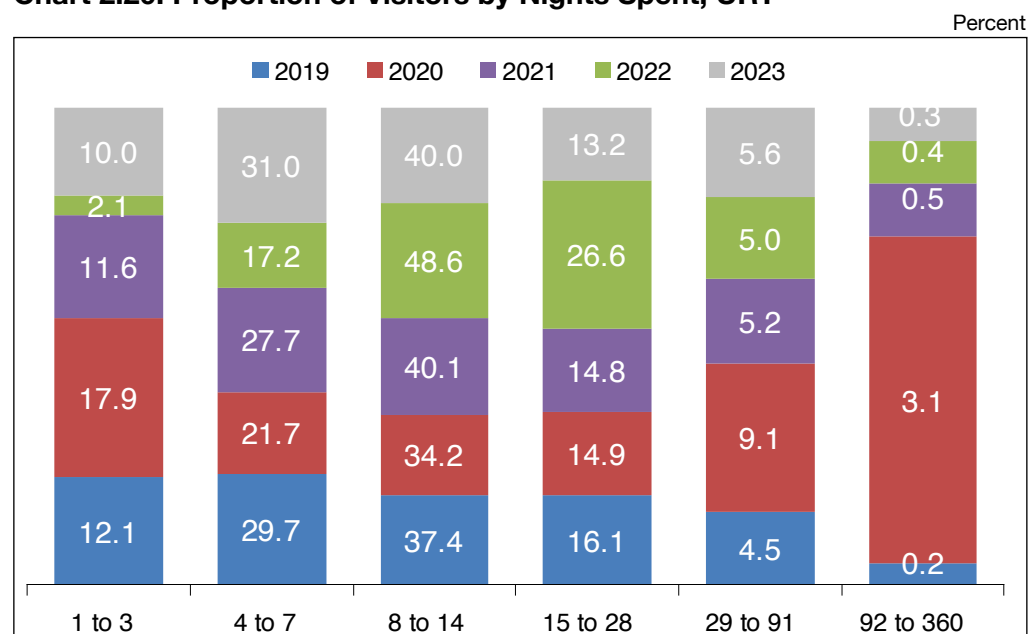
	Percent					
Purpose of visit	Alone	With children	With other friends and relatives	With parents	With spouse and children	With spouse
Business	6.3	0.0	0.5	0.0	0.3	0.3
Leisure and holidays	63.4	77.0	81.7	87.8	89.1	94.9
Medical treatment	0.6	0.0	0.0	0.0	0.0	0.0
Meetings and conference	6.0	0.0	2.1	0.0	0.7	0.9
Scientific and academic	1.3	0.0	0.5	0.0	0.3	0.1
Visiting friends and relatives	15.4	23.0	6.4	12.2	9.0	2.8
Volunteering	6.6	0.0	8.9	0.0	0.6	0.8
Other	0.3	0.0	0.0	0.0	0.0	0.1
Total	100	100	100	100	100	100

## 2.9 Nights Spent and Length of Stay

### 2.8.1 Nights Spent

Nights spent by visitors typically varied based on purpose of the visit and the country of origin. Survey results indicate that about 84 percent of visitors to URT stayed for 4 to 28 nights. Those who spent 1 to 3 nights, as well as those who stayed for 29 to 360 nights, accounted for the smallest portion of the total visitors. Similar findings have been depicted during the previous surveys. (**Chart 2.20**).

**Chart 2.20: Proportion of Visitors by Nights Spent, URT**



The results also reveal that the majority of those traveling for business, holidays and visiting friends and relatives stayed for 1 to 14 nights. Conversely, a significant portion of visitors traveling for leisure and holiday spent between 15 to 28 nights. Visitors who stayed for more than 28 days were predominantly visiting friends and relatives (**Table 2.11**)

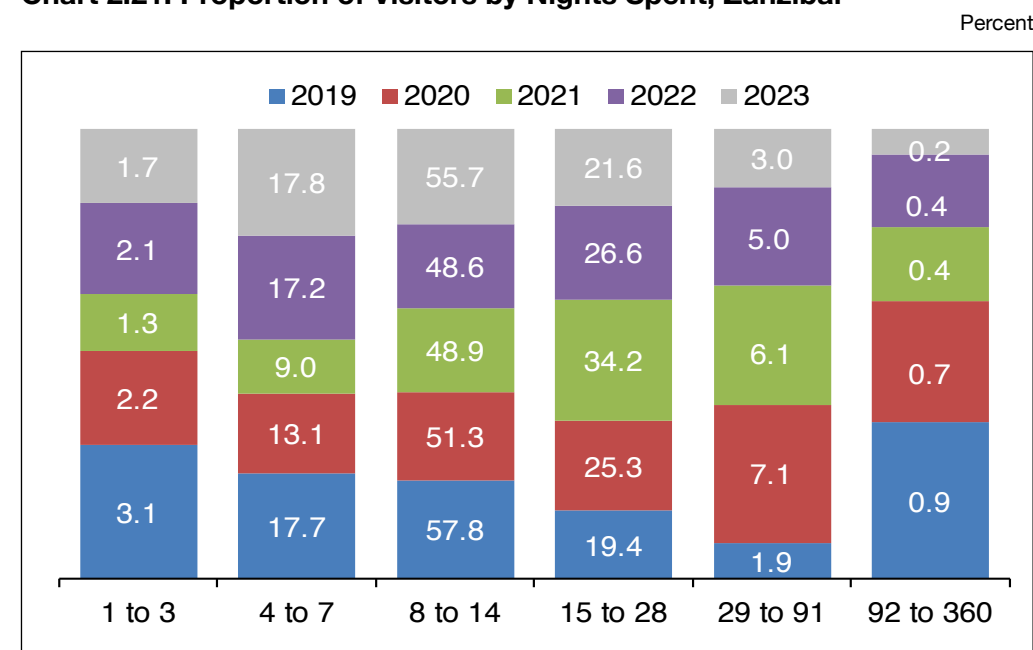
**Table 2.11: Distribution of Visitors by Nights Spent and Purpose of Visit, URT**

Percent

	Purpose of visit									Total
	Business	Leisure and holidays	Medical treatment	Meetings and conference	Religion	Scientific and academic	Visiting friends and relatives	Volunteering	Other	
1 to 3	24.7	12.0	1.0	5.2	0.0	0.8	34.2	0.1	22.0	100
4 to 7	24.7	49.2	0.0	5.3	0.5	0.7	15.7	0.2	3.6	100
8 to 14	6.6	80.3	0.2	1.7	0.2	0.3	9.5	0.6	0.7	100
15 to 28	7.0	69.2	0.8	1.5	0.7	0.8	14.8	3.0	2.2	100
29 to 91	18.8	27.1	2.6	2.4	1.3	1.8	35.4	7.7	2.8	100
92 to 360	8.5	17.0	0.0	0.0	2.1	14.9	36.2	12.8	8.5	100

In the case of Zanzibar, the results indicate that about 75 percent of total visitors to the island stayed for 8 to 28 nights, followed by those who spent 1 to 7 nights while a least number of visitors spent more than a month (**Chart 2.21**). This pattern has remained consistent across previous surveys.

**Chart 2.21: Proportion of Visitors by Nights Spent, Zanzibar**



The distribution of nights spent by purpose of visit in Zanzibar shows that majority of holiday makers, those traveling for business spent 1 to 3 nights. Most of holiday makers spent 4 to 28 nights. Visitors who spent more than 28 days to a large extent travelled for leisure and holidays (**Table 2.12**).

**Table 2.12: Distribution of Visitors by the Nights Spent and Purpose of Visit, Zanzibar**

Percent

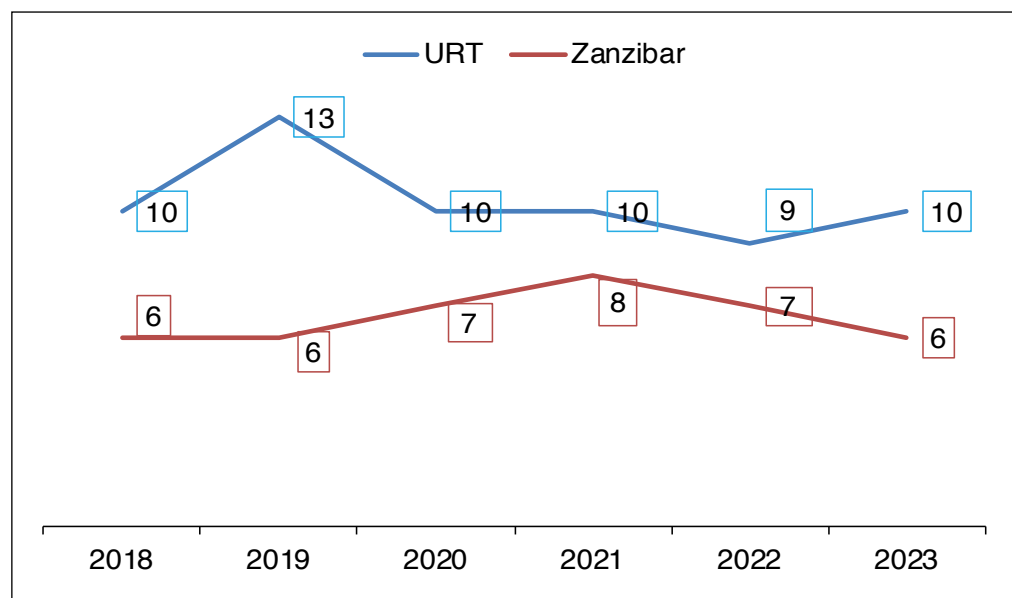
	Purpose of visit								Total
	Business	Leisure and holidays	Medical treatment	Meetings and conference	Scientific and academic	Visiting friends and relatives	Volunteering	Other	
1 to 3	17.3	44.2	0.0	7.7	0.0	13.5	17.3	0.0	100
4 to 7	3.6	83.9	0.0	2.2	0.6	8.1	0.8	0.8	100
8 to 14	0.2	91.2	0.0	0.4	0.2	5.9	1.9	0.3	100
15 to 28	0.1	90.3	0.0	0.2	0.1	8.5	0.5	0.1	100
29 to 91	8.6	80.0	0.8	0.0	0.0	8.2	0.4	2.0	100
92 to 360	17.6	64.7	0.0	0.0	0.0	5.9	5.9	5.9	100

### 2.9.2 Average Length of Stay

Length of stay serves as a crucial indicator for estimating tourism earnings in the country, measured by the number of nights spent by tourists in a destination. The survey findings for 2023 indicate that the overall average

length of stay for visitors to URT was 10 nights. With exception of 2019 and 2022, the average length of stay per person has consistently remained at 10 nights over the past five years. In Zanzibar, the overall average length of stay was 6 nights compared to the 7 nights recorded in 2022 (**Chart 2.22**).

**Chart 2.22: Average length of stay, URT and Zanzibar, 2018 to 2023**



In URT, visitors traveling for medical treatment stayed the longest, averaging 13 nights, whereas business visitors had the shortest stays, averaging 7 nights. In terms of source markets, visitors from Spain, Germany and Netherlands had the longest stays, while those from neighbouring countries such as Burundi, Zambia, Kenya and Zimbabwe stayed the shortest durations (**Table 2.13**).

**Table 2.13: Length of stay by purpose of visit, URT**

Table 2: Length of stay by purpose of visit, CWT						Percent
Country of residence	Purpose of Visit					Average
	Leisure and holidays	Business	Medical treatment	Visiting friends and relatives	Other	
United States	9	9	-	11	12	10
Italy	11	9	-	14	15	12
Germany	12	9	-	12	17	13
Zambia	6	6	6	7	4	6
United Kingdom	11	5	-	12	13	10
France	11	5	13	10	10	10
Kenya	6	5	3	7	4	5
Burundi	6	5	9	7	5	6
Spain	11	-	-	15	19	15
Uganda	6	7	21	7	6	9
Congo, DRC	9	8	22	10	8	11
Netherlands	13	5	-	17	10	13
Zimbabwe	6	6	-	5	3	5
Canada	10	5	-	14	10	10
India	7	6	-	9	8	7
Average	10	7	13	11	11	10

In Zanzibar, holiday visitors had the longest average stay, at 6 nights, while those visiting for business purposes stayed the shortest, with an average of 4 nights. Among the source markets, visitors from Australia and China had the longest average stays, at 8 nights, whereas visitors from Spain and Ethiopia spent an average of 4 nights (**Table 2.14**).

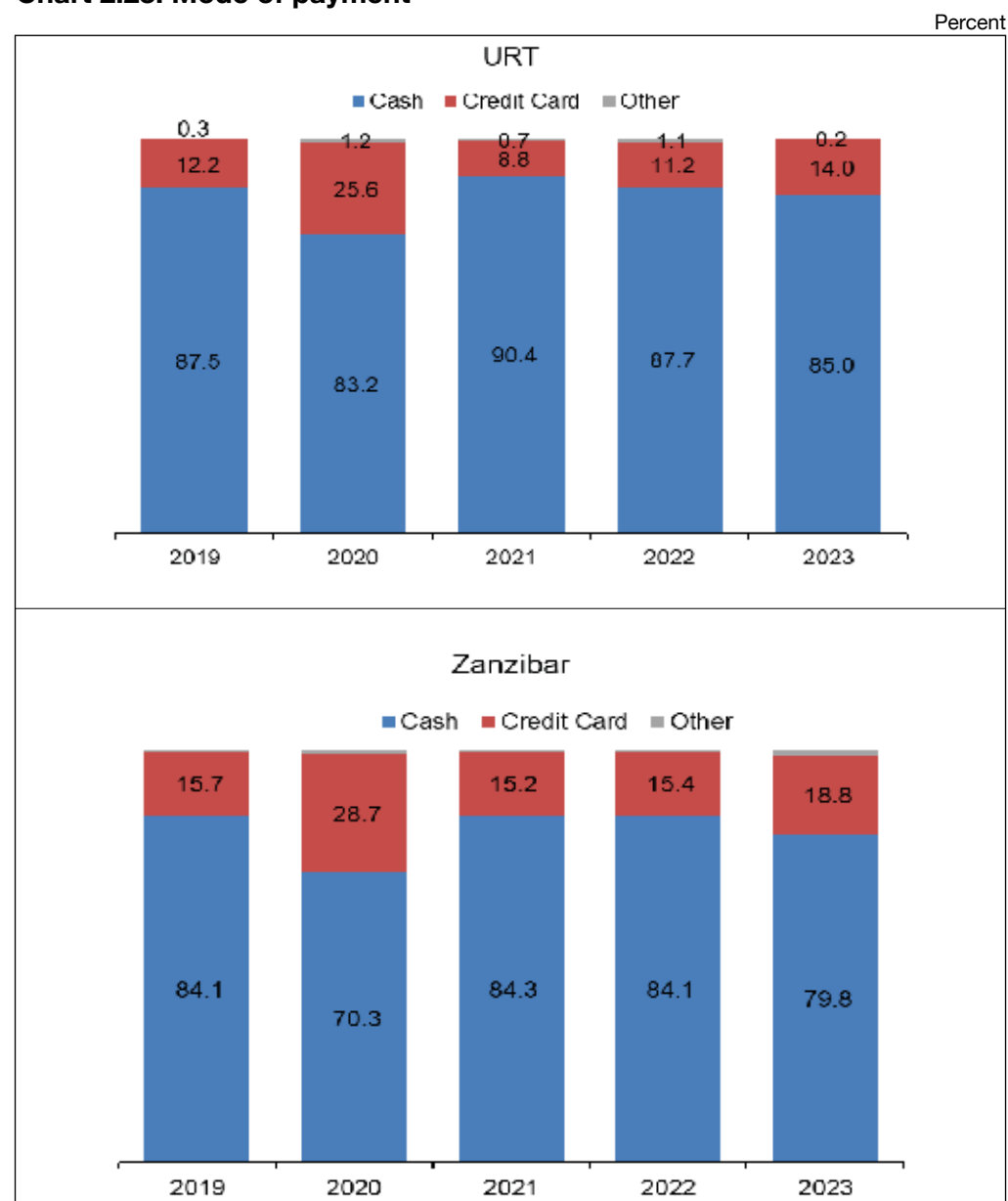
**Table 2.14: Average length of stay by purpose of visit, Zanzibar**

Purpose of visit					Percent
Country of residence	Leisure and holidays	Business	Visiting friends and relatives	Other	Average
Italy	8	8	9	6	7
Germany	7	7	7	6	7
France	7	2	7	11	7
United Kingdom	6	6	9	7	7
United States	5	4	3	6	5
Spain	5	-	2	6	4
Netherlands	7	3	5	7	6
Australia	6	-	14	7	8
Canada	4	-	7	4	5
Ethiopia	5	3	3	4	4
Kenya	7	5	3	-	5
Austria	6	-	5	5	6
Portugal	6	-	-	-	6
Israel	6	2	-	-	5
China	6	20	2	3	8
Average	6	4	5	8	6

## 2.10 Mode of Payment

As observed in previous surveys, the majority of interviewed visitors settled their bills in cash while in Tanzania, followed by those who utilized credit cards. Conversely, the number of visitors using other modes of payment remained minimal. A similar pattern was observed in Zanzibar (**Chart 2.23**).

**Chart 2.23: Mode of payment**

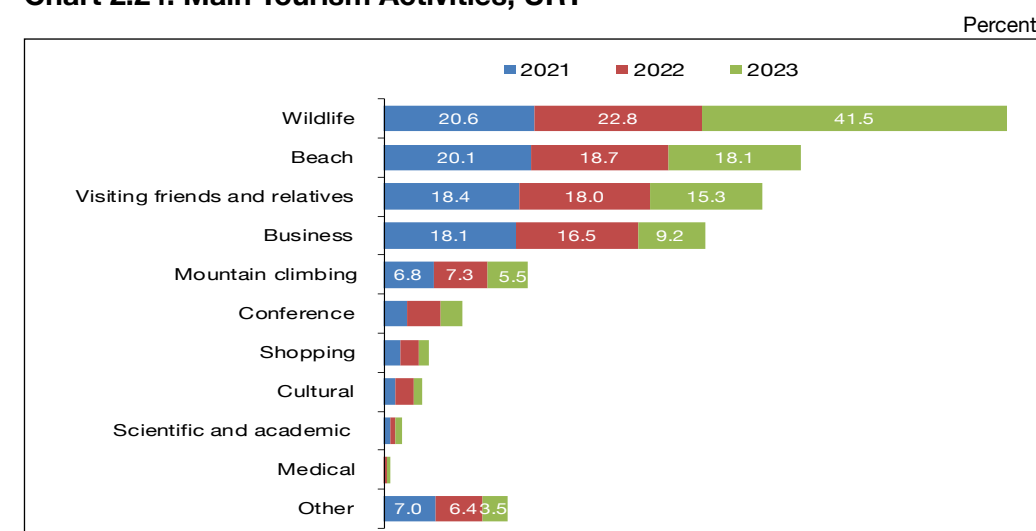


## 2.11 Main Tourism Activity

In URT, the activities that attracted most visitors were wildlife tours, beach activities, visiting friends and relatives and business engagements. These activities have consistently drawn more visitors in the last three years, with wildlife tours accounting for the largest share (**Chart 2.24**).

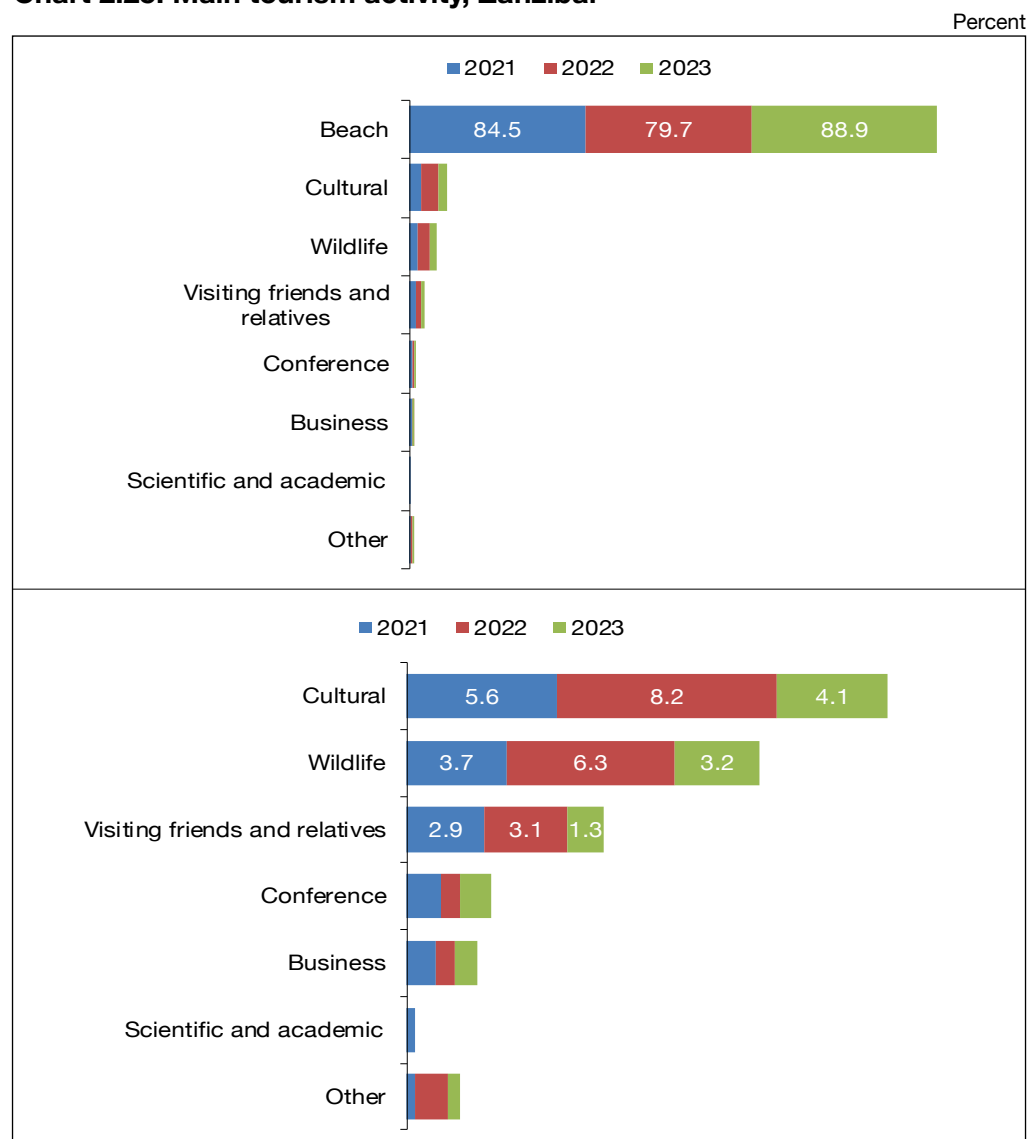


**Chart 2.24: Main Tourism Activities, URT**



In Zanzibar, beach tourism continued to dominate as the main tourism activity, accounting for about 88 percent (**Chart 2.25**).

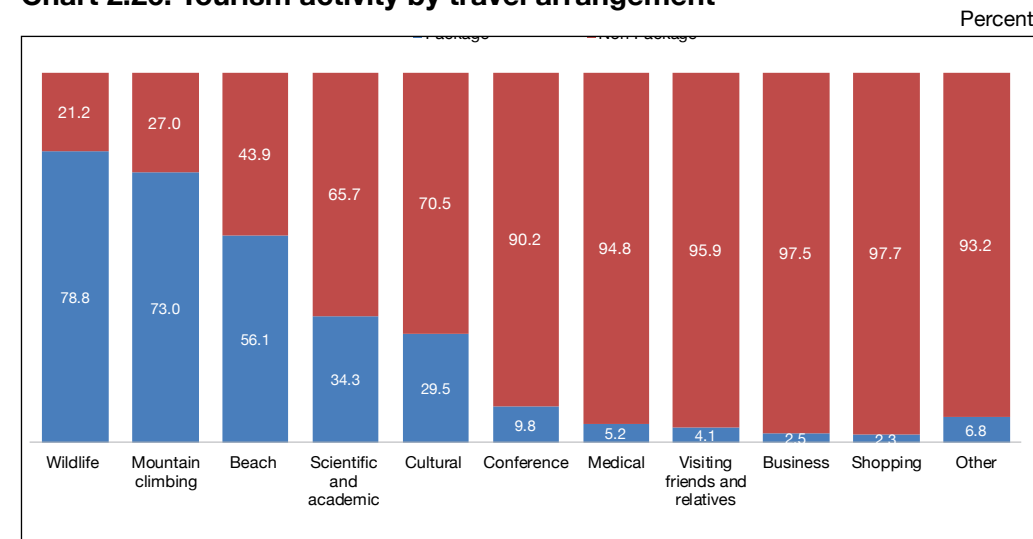
**Chart 2.25: Main tourism activity, Zanzibar**



## 2.12 Tourism Activity by Travel Arrangement

In URT, the majority of visitors under the package tour arrangement primarily came for wildlife safari, mountain climbing, and beach tourism, whereas most visitors under the non-package tour arrangement travelled for business purposes, visiting friends and relatives and medical treatment (**Chart 2.26**).

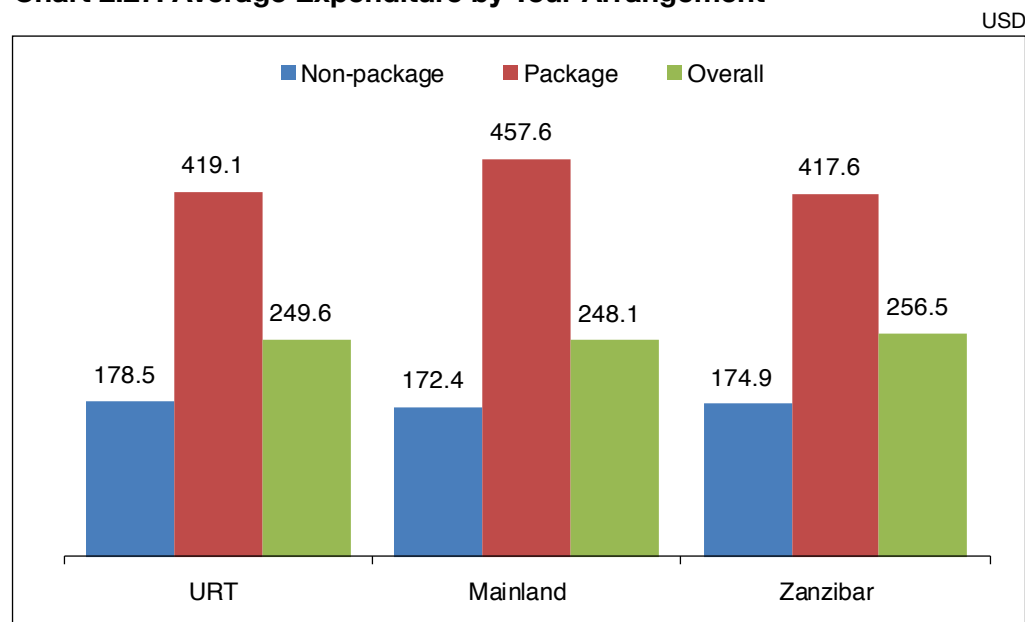
**Chart 2.26: Tourism activity by travel arrangement**



## 2.13 Average Expenditure

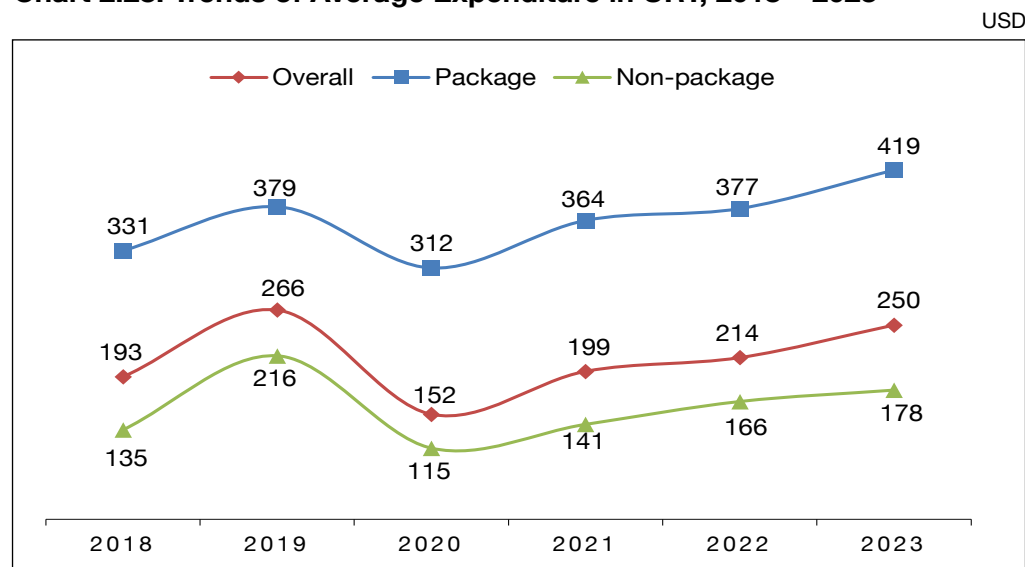
This section presents the average expenditure per person, per night for Mainland Tanzania, Zanzibar and URT as a whole. In URT, the overall average expenditure increased by 17 percent to USD 250 per person per night in 2023 from USD 214 registered in 2022. The average expenditure of visitors who came under the package tour arrangement was USD 214 per person per night, while that of visitors who used the non-package tour arrangement was USD 178. In Zanzibar, the overall average expenditure was USD 257 per person per night in 2023 compared to USD 218 recorded in 2022. Similarly, visitors to Zanzibar under the package tour arrangement spent an average of USD 418 per person per night, compared to USD 175 spent by visitors under the non-package tour arrangement. Mainland Tanzania recorded an overall average expenditure of USD 248 per person per night. Visitors who toured Mainland Tanzania under the package arrangement spent an average of USD 458 per person per night and those who toured independently spent an average of USD 172 per person per night (**Chart 2.27**).

**Chart 2.27: Average Expenditure by Tour Arrangement**



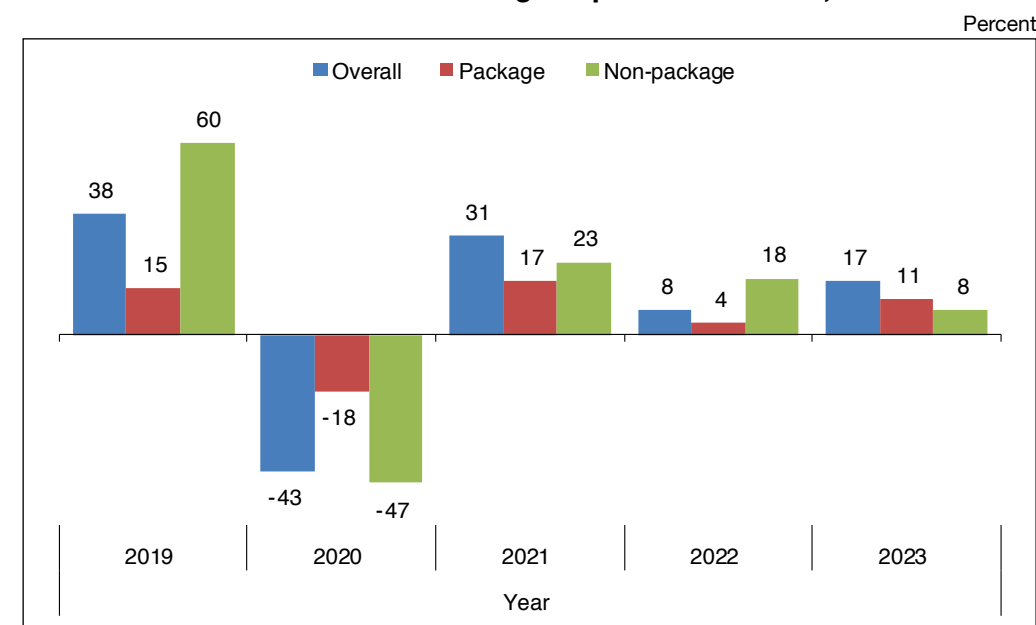
The overall average expenditure in 2023 was USD 250 per person per night, closely approaching the USD 266 recorded in 2019, implying that the tourism sector has rebounded to pre-COVID-19 pandemic levels. The trends in the average expenditure of both visitors who travelled under the package and non-package tour arrangements depict a positive pattern (**Chart 2.28**).

**Chart 2.28: Trends of Average Expenditure in URT, 2018 – 2023**



Over the past five years, the average expenditure has shown a 10 percent growth, with 2019 recording the highest increase of 38 percent, followed by 31 percent in 2021, rebounding from the highest drop of 43 percent caused by COVID-19 pandemic in 2020. Meanwhile, the annual average growth of non-package average expenditure sharply declined from 60 percent in 2019 to eight percent in 2023. On the contrary, the annual growth of average expenditure of visitors who travelled under the package tour arrangement reveals a cyclical trend, with highest growth of 17 percent in 2021 (**Chart 2.29**).

**Chart 2.29: Annual Growth of Average Expenditure in URT, 2019 - 2023**



The average expenditure by purpose of visit revealed that visitors travelling for leisure and holiday spent the highest, with an average expenditure of USD 305. Visitors travelling for business purposes, meetings and conferences and volunteering purposes also had high average expenditure. Likewise, visitors who came under the package tour arrangement spent the most in all purpose of visits, with the exception of those who came for medical treatment and transit purposes (**Table 2.15**).

**Table 2.15: Average Expenditure by Purpose of Visit and Tour Arrangement (USD)**

	Non-package	Package	Overall
Business	242	492	258
Leisure and holidays	226	395	305
Medical treatment	72	n/a	72
Meetings and conference	199	424	234
Transit	119	n/a	119
Religion	78	287	91
Scientific and academic	75	213	85
Visiting friends and relatives	109	468	137
Volunteering	147	538	203
Other	145	n/a	145
<b>Overall</b>	<b>178</b>	<b>419</b>	<b>250</b>

Note: n/a denotes not available

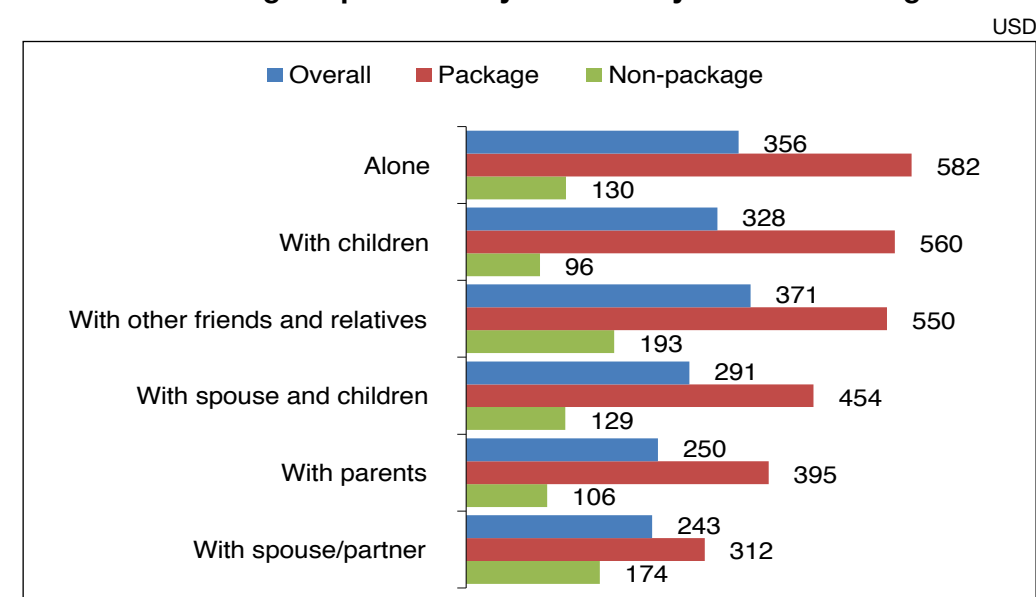
When examining the average expenditure by visitation in URT, first time visitors exhibited a higher overall average expenditure of USD 246 compared to USD 216 for repeat visitors (**Table 2.16**). A similar pattern was observed when analysing average expenditure by purpose and tour arrangement.

**Table 2.16: Average Expenditure by purpose of Visit and Visitation**

	First-time	Repeat	Combined
Leisure and holidays	301	313	305
Meetings and conference	263	203	234
Volunteering	243	82	203
Business	233	279	258
Visiting friends and relatives	130	143	137
Transit	130	108	119
Scientific and academic	108	58	85
Religion	99	86	91
Medical treatment	19	80	72
Other	17	187	145
<b>Overall</b>	<b>246</b>	<b>216</b>	<b>232</b>

In terms of average expenditure by travel party, visitors who travelled with friends and relatives spent the highest with an overall average of USD 371. Similarly, under the package tour arrangements visitors who travelled alone spent the most at an average of USD 582 per person per night (**Chart 2.30**).

**Chart 2.30: Average Expenditure by Travel Party and Tour Arrangement**



The average expenditure of visitors from top 15 source markets show that visitors from the United States of America spent the most, with an overall average expenditure of USD 405. Other source markets with high overall average expenditures were India, Canada, and China. Consequently, these markets exhibited high expenditures in both tour arrangements (**Table 2.17**).

**Table 2.17: Average Expenditure of Top 15 Source Markets by Tour Arrangements, URT**

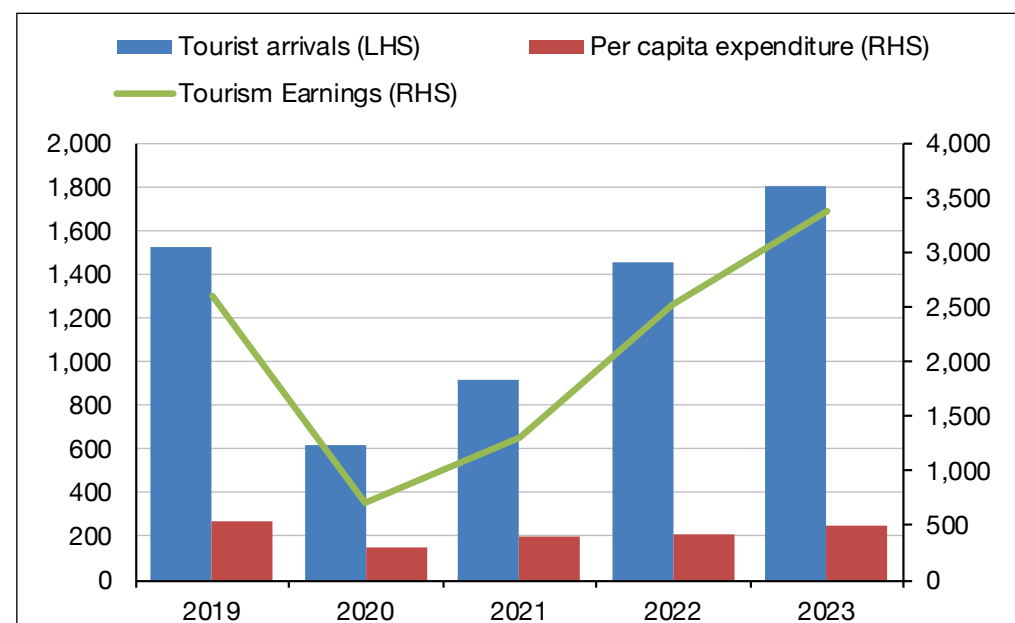
Country of residence	Non-package	Package	Overall
United States	197	457	405
India	181	392	326
Canada	199	497	298
China	327	674	287
Zimbabwe	164	239	246
United Kingdom	174	274	233
France	110	297	227
Italy	107	348	218
Germany	112	260	209
Spain	95	267	204
Congo, DRC	104	254	195
Zambia	106	142	191
Uganda	91	216	158
Kenya	98	143	133
Burundi	68	n/a	68

Note: n/a denotes not available

## 2.13 Tourism Earnings

Tourism earnings in the URT increased by 33.5 percent to USD 3,373.83 million in 2023, from USD 2,527.77 million recorded in 2022. This outturn is driven by increase of international arrivals and per capita expenditure (**Chart 2.31**).

**Chart 2.31: Tourism Earnings, Arrivals and Per Capita Expenditure**



Out of the total tourism receipts, USD 3,265.98 million was earned from tourists who travelled for leisure and holidays, which accounted for 96.8 percent, while earnings from tourists travelling for business purposes were the lowest, accounting for approximately USD 25 million. The findings also indicate that about 74.23 percent of total earnings were received from visitors who travelled under the package tour arrangement (**Table 2.18**).

**Table 2.18: Tourism Earnings by Purpose of Visit and Tour Arrangements**

Purpose of visit	Travel Arrangement		Total Earnings
	Package	Non-package	
Business	1.7	23.4	25.2
Leisure and holidays	2,490.6	775.3	3,266.0
Visiting friends and relatives	2.7	44.8	47.5
Other	9.3	25.9	35.3
Tourism Earnings	2,504.4	869.5	3,373.8

Tourism earnings in Zanzibar increased by 7.3 percent to USD 906.56 million in 2023 compared with USD 844.97 million in 2022. This increase was largely driven by an uptick in the number of visitors and average expenditure per person. Tourist arrivals to Zanzibar in 2023 reached 542,475, up from 447,959 in 2022, marking a notable increase of 21.1 percent. A significant portion of earnings came from visitors who travelled for leisure and holidays, totaling USD 904.42 million (99.8 percent), while earnings from business were comparatively lower. Earnings from visitors under the package tour arrangement accounted for 80.63 percent (**Table 2.19**).

**Table 2.19: Tourism earnings by travel arrangement and purpose of visit, Zanzibar**

Purpose of visit	Tour Arrangement		Total Earnings
	Package	Non-package	
Business	0.3	0.0	0.3
Leisure and holidays	730.5	173.9	904.4
Visiting friends and relatives	0.1	1.5	1.6
Other	0.1	0.2	0.3
Tourism Earnings	731.0	175.6	906.6

## 2.14 Most Visited Tourist Attractions

Survey results reveal that Ngorongoro, Serengeti, Beach, Stone Town and Tarangire were the most visited attraction sites, accounting for about 56 percent of visitors (**Chart 2.32**). These sites were mostly visited by tourists from long haul source markets mainly USA, Germany, Italy, France and the United Kingdom.

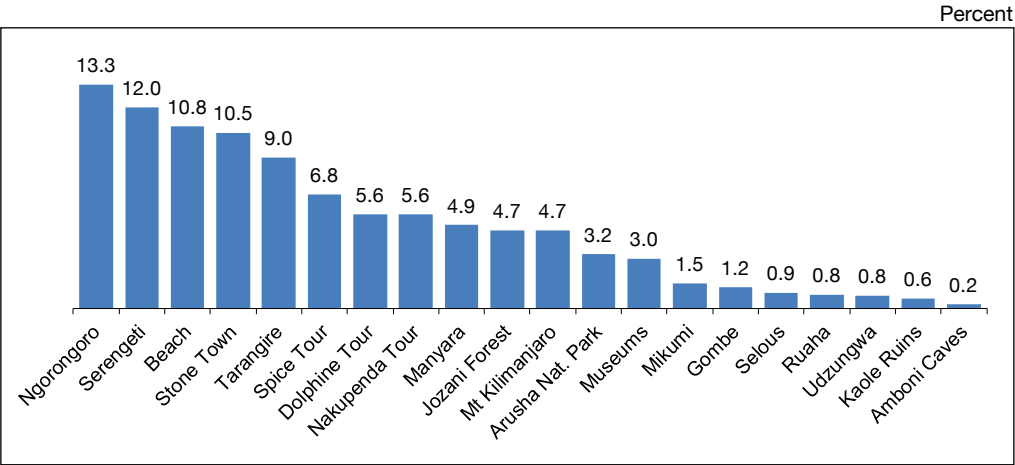
The prominence of Ngorongoro, Serengeti and Tarangire is attributed to the unique features of these areas, including the spectacular Ngorongoro Crater - the world's largest caldera, the high density of wildlife freely roaming, and the popular annual migration of wildebeest, zebra and gazelles. Notably, the Serengeti National Park secured the title of Africa's Leading National Park for the 5<sup>th</sup> consecutive year at the 2023 World Travel Awards.

Furthermore, the prominence of beach and Stone Town is attributed to the rich history and pristine white sandy beaches in Zanzibar. Consistently, the

2023 World Travel Awards also named Zanzibar the top destination for visitors seeking relaxation and pleasure.



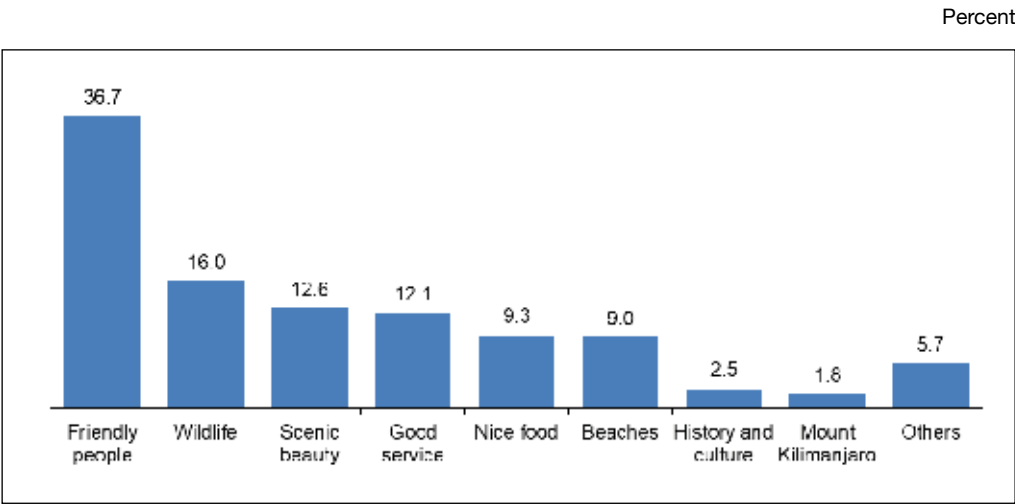
Chart 2.32: Most visited tourist attractions



### 2.15 Visitors' Impression

Tanzanians are naturally kind and friendly, a quality that has been consistently praised by visitors to the country over the years. Their welcoming attitude towards strangers enhances visitors' holiday experiences, making them special and unforgettable. When providing feedback on what impressed them most, interviewed visitors often highlighted the warmth and kindness of the people they encountered. Additionally, Tanzania's abundant wildlife and stunning landscapes stand out as remarkable features that leave a lasting impression on tourists. Furthermore, the variety of delicious and natural foods adds to the overall appeal of the destination (**Chart 2.33**).

Chart 2.33: Visitors' Impression



### 2.16 Areas That Need Improvement

About half of the visitors expressed overall satisfaction with the services but provided specific areas for improvement. Some visitors identified the need to enhance road infrastructure, especially those leading to and within attraction sites, as well as scale up conservation measures and improve hotel facilities and general cleanliness of public areas. It is noteworthy that the Government has undertaken significant initiatives to address concerns raised by visitors in previous surveys. These initiatives include ongoing investments in road and rail infrastructure, the revival of Air Tanzania, which has improved domestic and regional air transport, as well as the construction and renovation of airports.

## 2.2 Sector Outlook

The UNWTO barometer (January 2024) shows that international tourism has nearly rebounded from the unprecedented crisis of COVID-19 pandemic, with many destinations reaching or even exceeding pre-pandemic levels of arrivals and receipts. Available data shows that approximately 1.3 billion tourists travelled internationally in 2023, equivalent to 88 percent of pre-pandemic levels. This recovery is crucial for destinations, businesses, and communities where tourism is a major economic activity and a source of foreign exchange. The resurgence of the sector is also evident in international air capacity and passenger demand, as well as the global occupancy rate in accommodation establishments. Against this backdrop, international tourism is on track to fully recover to pre-pandemic levels in 2024. However, economic challenges such as high inflation, volatile oil prices, interest rates, as well as geopolitical headwinds continue to pose risks to the performance of the tourism sector.

The recovery of global international tourism supports the notable improvement seen in Tanzania's tourism industry. This is manifested in the increase in the number of international arrivals, which has surpassed pre-pandemic levels of 2019. Thus, prospects for 2024 and the short to medium term remain positive. Efforts to enhance promotion of domestic tourism to cushion the economy from external shocks are crucial.

## Chapter 3: Conclusion and Recommendations

### 3.1 Conclusion

The survey results demonstrate a significant rise in tourism earnings in URT, increasing by 33.5 percent to USD 3,373.7 million in 2023 from USD 2,527.8 million in 2022. This growth was driven by a surge in international arrivals, which reached a record high of 1,808,205 in 2023, up by 24.3 percent from 1,454,920 recorded in 2022. Similarly, in Zanzibar Tourism earnings increased to USD 906.56 million in 2023 compared with USD 844.97 million in 2022, marking a notable increase of 21.1 percent. Overall, the upsurge in tourist arrivals in 2023 can be attributed to the rebound of travel activity post-COVID, coupled with continued efforts by the government and private sector to promote tourism attractions within and outside the country.

### 3.2 Government strategies to improve the Sector

In 2023, the tourism sector has shown resilience and notable signs of fully recovery from COVID-19 pandemic, and continued to be an important source of foreign exchange earnings for destination Tanzania. However, in order to sustain the growth of the sector, the government in collaboration with the private sector has taken the necessary steps to implement multiple strategies to continuously monitor, evaluate, and adapt initiatives that will enhance development of tourism products, facilities, promotion and marketing of the attractions. Specifically, the government in collaboration with private sector will continue to:

- i. Strengthen and promote adventure tourism, eco-tourism, cultural and historical tourism, beach tourism, cruise tourism or gastronomic tourism and Meeting, Incentives, Conference and Events (MICE);
- ii. Create innovative and authentic experiences, including culinary tours, nature expeditions, art and craft workshops, and historical tours;
- iii. Collaborate with travel influencers, bloggers, and media outlets to create compelling content that showcases the beauty and diversity of Tanzania's tourist attractions;

- iv. Utilize digital marketing channels, social media platforms, and travel websites to reach a global audience;
- v. Enhance budget allocation for construction and maintenance of transportation infrastructure (roads, railways, airports, air strips and harbor); and
- vi. Improve cleanliness at tourist sites and all public areas.

## Appendices

## Appendix A: Methodology

### I. Introduction

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

### II. Scope of the Survey

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

### III. Sample Size

The sample survey managed to randomly interview 7,084 respondents, representing 12,372 departing international visitors. This sample was considered sufficient to meet the survey's objectives.

### IV. Survey Coverage

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

### V. Training of Interviewers

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

### VI. Data Collection

Following the training of interviewers, eight teams were formed (1 for Zanzibar and 7 for Mainland Tanzania). Data collection exercise was undertaken during the tourist peak season, which normally runs from July to September. It was conducted for a two-week period, starting on 28<sup>th</sup> August to 10<sup>th</sup> September 2023. Fieldwork supervision was coordinated by the Technical Committee staff who made visits to the teams to review the work and monitor data quality, including consistency checks and questionnaire completeness.

### VII. Interviewer Manual

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

### VIII. Questionnaire

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

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

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

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

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

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

## IX. Data Processing

The processing of the 2023 International Visitors' Exit Survey data began shortly after completion of fieldwork. Data processing involved manual editing, coding of open-ended questions, data entry and editing of computer-identified errors. Data entry and editing were accomplished using the ORACLE11g database and web-based application.

## X. Tourist Expenditure Estimation

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

The model is depicted in the following equation:

$$E_v = (E_p \cdot V_p \cdot T) + (E_{NP} \cdot V_{NP} \cdot T)$$

Whereby:

$E_v$  = Total tourist expenditure in Tanzania

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

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

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

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

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

## The Simplified Model

Country of Residence	Purpose of Visit	Total Visitors (sourced from Immigration Dept)	Visitors by travel arrangement		Avg. length of stay	Avg. expenditure per visitor per night		Total expenditure
						Package	Non Package	
			Package (VP)	Non-package (VNP)	(T)	(EP)	(ENP)	(EV)
	Business							
	Holiday							
	VFR							
	Other							

### Procedure and assumptions used for the estimation of tourist expenditure for 2023:

- Calculation of average package tour expenditure involved deduction of estimated cost for international fare to Tanzania and commission accruing to an international tour wholesaler. Information on cost of international transport from source markets was updated using current information gathered from international carriers that bring visitors to Tanzania.
- It was assumed that 10 percent of the value of the package is retained by the international tour wholesaler to meet overhead costs and commission. The assumption was based on a study on Tourism Earnings in Tanzania that was conducted in 2000.
- Immigration data on arrivals by purpose of visit were distributed according to package and non-package arrangements using the travel arrangement ratios as established in the survey.
- To be able to estimate annual tourists' expenditure, survey results were applied to the total number of tourist arrivals as recorded by the Immigration Department. It is worth mentioning that given the homogeneity nature of visitors' characteristics, information collected during the two weeks' survey is justifiable to represent the total population.
- Immigration Department also provides the number of tourist arrivals for Zanzibar that enables estimation of tourist expenditure for Zanzibar.
- The average length of stay used was between one to twenty-eight nights.

## Appendix B: Questionnaire



### THE 2023 INTERNATIONAL VISITORS' EXIT SURVEY

Please read the instructions carefully before filling the form.

#### INTRODUCTION

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

*Your Cooperation is highly appreciated*

FOR OFFICIAL USE ONLY:

NAME OF THE RESEARCHER: \_\_\_\_\_

DATE: \_\_\_\_\_ SIGNATURE: \_\_\_\_\_

NAME OF THE DATA ENTRANT: \_\_\_\_\_

1. Nationality \_\_\_\_\_ Country of usual residence \_\_\_\_\_

2. Age group (*tick one only*)

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

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

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

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

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

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

6. Gender	Number of females	<input type="text"/>
	Number of males	<input type="text"/>

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

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

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

Wildlife tourism	<input type="checkbox"/>	Mountain climbing	<input type="checkbox"/>
Beach tourism	<input type="checkbox"/>	Hunting tourism	<input type="checkbox"/>
Cultural tourism	<input type="checkbox"/>	Visiting friends and relatives	<input type="checkbox"/>
Business	<input type="checkbox"/>	Shopping (for business)	<input type="checkbox"/>
Bird-watching	<input type="checkbox"/>	Meetings and conferences	<input type="checkbox"/>
Medical treatment	<input type="checkbox"/>		
Scientific and academic		Other (please specify) .....	

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

Amboni caves	<input type="checkbox"/>	Mikumi	<input type="checkbox"/>	Ruaha	<input type="checkbox"/>	Ngorongoro	<input type="checkbox"/>
Arusha Nat. Park	<input type="checkbox"/>	Selous	<input type="checkbox"/>	Manyara	<input type="checkbox"/>	Stone Town	<input type="checkbox"/>
Kaole ruins	<input type="checkbox"/>	Tarangire	<input type="checkbox"/>	Mt. Kilimanjaro	<input type="checkbox"/>	Museums	<input type="checkbox"/>
Udzungwa	<input type="checkbox"/>	Serengeti	<input type="checkbox"/>	Gombe	<input type="checkbox"/>	Beaches	
Other (Specify) .....							

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

Travel agents/ Tour operators	<input type="checkbox"/>	Inflight magazines	<input type="checkbox"/>
Friends/relatives	<input type="checkbox"/>	Tanzania's missions abroad	<input type="checkbox"/>
Royal tour documentary		Radio Station (please specify).....	
Trade fair	<input type="checkbox"/>	TV i.e. CNN, BBC, Safari Channel (please specify): ..	<input type="checkbox"/>
Newspapers. Magazines, brochures	<input type="checkbox"/>	Other (please specify ).....	<input type="checkbox"/>
Travel advisory	<input type="checkbox"/>		

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

Package	Independently

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

International transport	<input type="checkbox"/>	Sightseeing/excursion/game activities	<input type="checkbox"/>
Accommodation	<input type="checkbox"/>	Guided tour	<input type="checkbox"/>
Food and drinks	<input type="checkbox"/>	Travel insurance	<input type="checkbox"/>
Internal Transport while in Tanzania	<input type="checkbox"/>	Other (please specify) .....	

13. Total cost of the package tour:

Currency	Amount

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

Yes ☐ No ☐

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

16. Number of nights spent in:

Tanzania Mainland	
Zanzibar Islands	

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

Currency	Amount

18. What was your first point of entry to Tanzania? (tick)

Tanzania Mainland	
Zanzibar Islands	

19. How much money did you spend in Tanzania during this trip including cash, traveller's cheques, charge cards?  
(please give your best estimate in case you do not remember the exact figures)

Currency	Amount

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

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

21. Is the above breakdown for the whole party?

(Tick) Yes [ ] No [ ]

22. Which modes of payment did you use mostly in Tanzania? (Tick one)

Cash [ ] Traveler's Cheques [ ] Credit Card [ ] Other (Please specify):

.....

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

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

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

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

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

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

27. Did the Coronavirus pandemic affect your travel plan to Tanzania?

Yes [ ] No [ ]

Please explain: .....  
.....  
.....  
.....

## Appendix C: International Visitors by Country of Residence

S/N	Source country	Visitors	Share (%)
1	United States	2,046	16.5
2	Italy	1,074	8.7
3	Germany	945	7.6
4	Zambia	836	6.8
5	United Kingdom	726	5.9
6	France	674	5.4
7	Kenya	635	5.1
8	Burundi	598	4.8
9	Spain	476	3.8
10	Uganda	366	3.0
11	Congo, DRC	314	2.5
12	Netherlands	250	2.0
13	Zimbabwe	233	1.9
14	Canada	226	1.8
15	India	215	1.7
16	China	205	1.7
17	Australia	203	1.6
18	Ethiopia	133	1.1
19	South Africa	128	1.0
20	Austria	124	1.0
21	Israel	122	1.0
22	Rwanda	112	0.9
23	Belgium	112	0.9
24	Switzerland	110	0.9
25	Portugal	105	0.8
26	Oman	74	0.6
27	United Arab Emirates	73	0.6
28	Russia	73	0.6
29	Poland	67	0.5
30	Denmark	64	0.5

S/N	Source country	Visitors	Share (%)
31	Sweden	60	0.5
32	Greece	51	0.4
33	Nigeria	50	0.4
34	Japan	48	0.4
35	Ireland	40	0.3
36	Czech Republic	39	0.3
37	Brazil	39	0.3
38	Norway	39	0.3
39	Singapore	34	0.3
40	Comoros	32	0.3
41	Malawi	29	0.2
42	New Zealand	27	0.2
43	Egypt	26	0.2
44	Mexico	25	0.2
45	Mozambique	25	0.2
46	Chile	23	0.2
47	Morocco	23	0.2
48	North Korea	23	0.2
49	Turkey	21	0.2
50	Luxembourg	19	0.2
51	Finland	17	0.1
52	Cameroon	17	0.1
53	South Korea	17	0.1
54	Algeria	16	0.1
55	Hungary	15	0.1
56	Iceland	13	0.1
57	Qatar	11	0.1
58	Romania	11	0.1
59	Taiwan	11	0.1
60	Angola	10	0.1
61	Slovakia	10	0.1

S/N	Source country	Visitors	Share (%)
62	Botswana	10	0.1
63	Congo-Brazzaville	9	0.1
64	Namibia	8	0.1
65	Saudi Arabia	8	0.1
66	Croatia	8	0.1
67	Cyprus	8	0.1
68	Serbia	7	0.1
69	Thailand	7	0.1
70	Indonesia	7	0.1
71	Ghana	7	0.1
72	Panama	6	0.0
73	Belarus	6	0.0
74	Philippines	6	0.0
75	Jordan	6	0.0
76	Ukraine	6	0.0
77	Malaysia	6	0.0
78	Colombia	6	0.0
79	Lebanon	6	0.0
80	Iran, Islamic Republic Of	5	0.0
81	Equatorial Guinea	5	0.0
82	Swaziland	5	0.0
83	South Sudan	5	0.0
84	Costa Rica	4	0.0
85	Tunisia	4	0.0
86	Mauritius	4	0.0
87	Sri Lanka	4	0.0
88	Mali	3	0.0
89	Andorra	3	0.0
90	Burkina Faso	3	0.0
91	San Marino	3	0.0
92	Yemen	3	0.0

S/N	Source country	Visitors	Share (%)
93	Liberia	3	0.0
94	Bulgaria	3	0.0
95	Madagascar	3	0.0
96	Eritrea	3	0.0
97	Slovenia	3	0.0
98	Vietnam	3	0.0
99	Pakistan	3	0.0
100	Cote D Ivoire	3	0.0
101	Peru	2	0.0
102	Bangladesh	2	0.0
103	Latvia	2	0.0
104	Honduras	2	0.0
105	Papua New Guinea	2	0.0
106	Lithuania	2	0.0
107	Uruguay	2	0.0
108	Syria	2	0.0
109	Nicaragua	1	0.0
110	Kyrgyzstan	1	0.0
111	Bolivia	1	0.0
112	Reunion	1	0.0
113	Albania	1	0.0
114	Senegal	1	0.0
115	Argentina	1	0.0
116	Guinea	1	0.0
117	Haiti	1	0.0
118	Barbados	1	0.0
119	Seychelles	1	0.0
120	Kuwait	1	0.0
121	Sudan	1	0.0
122	Gambia	1	0.0
Total		12,372	100

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**MINISTRY OF NATURAL RESOURCES AND TOURISM**

**[WWW.MALIASILI.GO.TZ](http://WWW.MALIASILI.GO.TZ)**

**BANK OF TANZANIA ( BOT )**

**[WWW.BOT.GO.TZ](http://WWW.BOT.GO.TZ)**

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**[WWW.ZANZIBARTOURISM.NET](http://WWW.ZANZIBARTOURISM.NET)**

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**[WWW.MOHA.GO.TZ](http://WWW.MOHA.GO.TZ)**

