The 2015
International Visitors' Exit Survey Report

TANZANIA TOURISM SECTOR SURVEY

THE 2015 INTERNATIONAL VISITORS' EXIT SURVEY REPORT

October 2017

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ACRONYMS

AAKIA	Abeid Amani Karume International Airport
BOT	Bank of Tanzania
DCC	Dar es Salaam City Council
HAT	Hotel Association of Tanzania
JNIA	Julius Nyerere International Airport
KAS	Kasumulo
KIA	Kilimanjaro International Airport
LGAs	Local Government Authorities
MANY	Manyovu
MFAIC	Ministry of Foreign Affairs and International Cooperation
MNRT	Ministry of Natural Resources and Tourism
MoT	Ministry of Transport
MoW	Ministry of Works
MTU	Mtukula
NAM	Namanga
NBS	National Bureau of Statistics
TAA	Tanzania Airport Authority
TANAPA	Tanzania National Parks
TCT	Tourism Confederation of Tanzania
TIC	Tanzania Investment Centre
TTB	Tanzania Tourist Board
TUN	Tunduma
UNWTO	United Nations World Tourism Organization
URT	United Republic of Tanzania
VFR	Visiting Friends and Relatives
ZATI	Zanzibar Association of Tourism Investors
ZCT	Zanzibar Commission for Tourism

FOREWORD

The tourism industry which account for about 24.0 percent of Tanzania's exports of goods and services continued to be the leading sector in terms of generating foreign exchange earnings. Given its endowment and having exceptionally rich natural tourism assets of the world heritage status, the sector is an ideal vehicle for propelling growth and poverty reduction. However, during 2015 the number of international tourist arrivals declined slightly by 0.3 percent to 1,137,182 from 1,140,156 registered in 2014. As a result of this development, tourism earnings went down by 5.2 percent to USD 1,902.0 million in 2015 from USD 2,006.3 million in 2014.

In view of the foregoing, we are pleased to introduce the 2015 Tanzania Tourism Sector Survey (TTSS), Report produced by the multi-institutional committee comprising the Ministry of Natural Resources and Tourism (MNRT), Bank of Tanzania (BOT), National Bureau of Statistics (NBS), Immigration Department and the Zanzibar Commission for Tourism (ZCT).

The 2015 survey results indicate that most of the visitors were impressed by Tanzania as one of the unique destinations with friendly people and wonderful scenery. However, the majority of the visitors indicated the need for further improvement in the state of roads, particularly within the national parks, unacceptability of credit cards at most of the tourism establishments, traffic jams in Dar es Salaam and poor quality of services in some of the hotels. It is expected that this report will provide useful information to policy makers, investors, academicians and other stakeholders.

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

Prof. Benno Ndulu
Governor
Bank of Tanzania

ACKNOWLEDGEMENT

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This report was prepared under the overall supervision of Mr. Z. A. Kimwaga (Director of Tourism – MNRT) and J. J. Nyella (Director, Economic Research and Policy-BOT). The Technical Team was led by Mr. P. Mwiru, Assistant Director of Tourism (MNRT), in collaboration with Ms. N. Moshy, Manager, International Economics and Trade Department (BOT). Other members of the team were Dr. C. Masenya (BOT), Mrs. V. W. Kejo (BOT), Mr. P. Mboya (BOT), Mr. J. Msimbano (MNRT), Mr. V. Tesha (NBS), Ms. E. Lema (NBS), Mrs. J. Rugemalila (NBS), Mr. C. Mndeme (Immigration Department) and Mr. M. Jaffer (ZCT). Special appreciations should also go to Mr. R. Barongo and R. William from BOT for managing the data processing exercise.

EXECUTIVE SUMMARY

International tourist arrivals grew by 4.4 percent to 1,184 million in 2015, according to the UNWTO World Tourism Barometer, March 2016. The performance to a large extent is attributed to strong exchange rate fluctuations, the drop in oil prices and other commodities which increased disposable income in importing countries. Looking at international tourist arrivals by region, Europe, the Americas and Asia and the Pacific recorded growth of 4.9 percent, 5.0 percent and 5.0 percent, respectively in 2015. International tourist arrivals to the Middle East increased by 2.9 percent while Africa registered a fall of about 2.9 percent, mostly due to weak results in North Africa, which accounts for over one third of arrivals in the region.

In East Africa, the number of international tourist arrivals in Kenya continued with a downward trend, contracting by 12.6 percent to 1,180,500 in 2015 from 1,350,400 in 2014, mainly due to security concerns that resulted from negative travel advisories from some European source markets and health concerns associated with spread of Ebola particularly in the West Africa in 2014[1]. The number of international tourist arrivals to Tanzania declined by 0.3 percent to 1,137,182 in 2015 from 1,140,156 registered in 2014 consistent with general performance in Africa. On the other hand, international tourist arrivals in Uganda increased by 2.9 percent to 1,302,802 in 2015 from 1,266,046 recorded in 2014. This report presents the findings of the 13th international visitors' exit survey, which was conducted for a period of two weeks between August and September 2015.

Main findings

Source Markets

The survey findings indicate that the top 15 source markets accounted for 77.2 percent of the total visitors in 2015 compared to 82.0 percent reported in the previous survey. This implies that tourist source markets for Tanzania are becoming more diversified thanks to the Government efforts to increase promotion in nontraditional markets. The list of the top 15 source markets is similar to that of the previous survey with the exception of Uganda that has been replaced with Switzerland. The findings indicate further that the share of visitors from Kenya increased from 4.8 percent in 2014 to 9.7 percent making it the third largest source market for Tanzania in 2015, largely associated with its proximity to Tanzania as well as increased business relations.

1 Economic Survey 2016, Kenya National Bureau of Statistics

Visitors' expenditure

Tourism earnings in Tanzania declined by 5.2 percent to USD 1,902.0 million in 2015 from 2,006.3 million recorded in 2014 largely attributed to slight fall in the number of international tourist arrivals and average expenditure per person. The number of international tourist arrivals dropped by 0.3 percent to 1,137,182 in 2015 from 1,140,156 registered in 2014 while overall average expenditure per person per night decreased to USD 199.0 from USD 221.0 recorded in 2014.

Leisure and holidays was the major purpose of visit for most tourists

The majority of visitors came for leisure and holidays followed by those who came to visit friends and relatives as well as for business. The dominance of visitors who came for leisure and holiday is associated with the country's endowment of variety of exquisite tourist attractions including national parks, mountains and cultural and historical sites. Only a few visitors came as volunteers.

Majority of the visitors stayed between 8 and 28 nights

About 51.0 percent of the visitors spend between 8 to 28 nights, followed by those who stayed between 4 to 7 nights. Visitors who stayed more than one month accounted for about six percent of total visitors. The findings also indicate that the average length of stay of a visitor in the United Republic of Tanzania was 10 nights, same as it was in the last past five years. Visitors who stayed the longest were from Netherlands with 16 nights while those who stayed the least were from Zimbabwe and Zambia with 5 nights each.

First-time visitors continue to dominate over repeat visitors

The survey findings indicate that 52.6 percent of the respondents were first-time visitors compared to 67.3 percent in the previous survey. Out of the total first-time visitors, 56.0 percent came the under package tour arrangement while the rest used the non-package tour arrangement. First-time visitors prefer the package tour arrangement because in most cases, they are not familiar with the destinations.

Wildlife tourism continues to be the main activity

The survey findings indicate that wildlife tourism continued to be the main tourism activity in Tanzania, accounting for 34.0 percent of all the visitors. Most of the visitors who came for this activity were from the United States of America, United Kingdom, France and Netherlands. The second most attractive activity was beach accounting for 24.7 percent and was mostly visited by tourists from Germany, the United Kingdom, Kenya and the United States of America. Other prominent activities were cultural, mountain climbing and business. The majority of visitors who came for business were from Zimbabwe and Zambia coming to utilize Dar es Salaam Port.

Cash continued to be a major mode of payment

About 81.0 percent of the visitors used cash in settling their transactions while in Tanzania compared to 86.9 percent recorded in 2014 representing a decline of 5.9 percentage points. The number of visitors who settled their bills through credit cards improved to 18.6 percent from 12.8 percent in 2014 while the use of travellers' cheque was 0.1 percent. In Zanzibar 75.5 percent of visitors settled their bill in cash while 24.1 percent used credit cards. Unacceptability of credit cards at most of the tourism establishments continues to be a challenge. Visitors are likely to stay longer if credit card facility is widely accepted as it facilitates transactions and reduces the risk of carrying cash.

Policy Recommendations

a) The findings indicated that unacceptability of credit cards at most of the tourism establishments continues to be a problem to the majority of the visitors as the use of credit cards continues to be low. In view of this there is a need for banks to sensitize owners of tourism establishments and other relevant stakeholders on the importance and benefit of allowing visitors to make use of credit cards when settling their bills.

b) The survey's results indicate that the overall average length of stay of visitors to the United Republic of Tanzania was 10 nights same as it was in the past five years. This implies that there is a need of enhancing diversification of tourism products in addition to wildlife which has been a dominant tourism activity. This is expected to increase the number of nights spent and expenditure in the country.

c) The findings indicated that wildlife was the activity visited by majority of visitors in 2015, apart from other tourist attractions such as sandy beaches, historical sites, mountains, nature and landscapes. This implies that there is a need of putting more efforts in promoting other forms of tourist attractions so as to complement wildlife tourism.

d) The findings also indicate many visitors complained about cleanliness and inadequate public toilets in areas such as airports, national parks and roadside, unsatisfactory state of air conditioners at airports and poor states of roads within the national parks. The government is therefore urged to continue with its efforts to improve roads in the national parks and other facilities.

e) Traffic jam in Dar es Salaam region continued to be the major concern of most tourists. The government is advised to continue with its efforts to address the infrastructural issues.

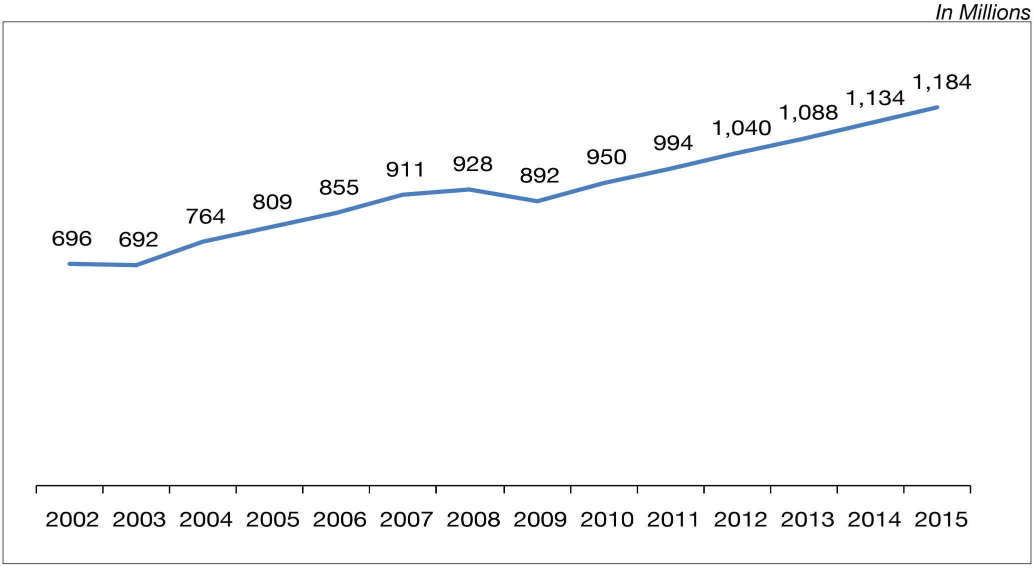
Chapter 1: Recent Developments in the Tourism Industry

1.1 Global Perspective

International tourist arrivals grew by 4.4 percent to 1,184 million in 2015, according to the UNWTO World Tourism Barometer, March 2016 (**Chart 1.1**). This is the 6th consecutive year of above-average growth, whereby international arrivals increased by over 4.0 percent every year since the post-crisis year of 2010. This good performance to a large extend is attributed to strong exchange rate fluctuations, the drop in oil prices and other commodities which increased disposable income in importing countries.

Chart 1.1: International Tourist Arrivals to the World, 2002-2015

In Millions



Source: UNWTO World Tourism Barometer, March 2016

Growth in advanced economy destinations was 5.0 percent higher than 4.0 percent recorded in emerging economies. By region, Europe, the Americas and Asia and the Pacific recorded growth of 4.9 percent, 5.0 percent and 5.0 percent, respectively in 2015 (**Table 1.1**). International tourist arrivals to the Middle East increased by 2.9 percent while **Africa** registered a fall of about 2.9 percent, mostly due to weak results in North Africa, which accounts for over one third of arrivals in the region.

Table 1.1: International Tourist Arrivals by Regions, 2010-2015

Region	2010	2011	2012	2013	2014	2015
			In Millions			
Europe	489	521	541	567	580	609
Asia and the Pacific	206	218	234	250	264	278
Americas	150	156	163	168	182	191
Africa	50	50	52	55	55	53
Middle East	55	50	51	49	52	54
			Percentage Change			
Europe	6.2	6.4	3.9	4.7	2.4	4.9
Asia and the Pacific	13.5	6.2	7.1	6.9	5.8	5.0
Americas	6.8	3.6	4.5	3.1	8.4	5.0
Africa	7.9	-0.6	4.6	4.4	0.4	-2.9
Middle East	5.2	-9.5	2.2	-3.0	6.7	2.9

Source: UNWTO World Tourism Barometer, various issues

Looking at contribution to the international tourist arrivals, Europe continued to account for the largest share, followed by Asia and the Pacific, the Americas, the Middle East and Africa, as indicated in **Table 1.2**. The same pattern was observed in previous years. However, the share of Africa has been declining reflecting lack of convenient transport, security concerns and threat to wildlife.

Table 1.2: Market Shares of International Tourist Arrivals

Percent

Region	2012	2013	2014	2015
Europe	52.0	52.1	51.2	51.4
Asia and the Pacific	22.5	23.0	23.3	23.4
Americas	15.6	15.4	16.0	16.1
Africa	5.0	5.0	4.8	4.5
Middle East	4.9	4.5	4.6	4.6
World	100.0	100.0	100.0	100.0

Source: UNWTO World Tourism Barometer, various issues

UNWTO projections indicate that international tourist arrivals will increase by between 3.5 and 4.5 percent in 2016, above the 3.8 percent average recorded between 2005 and 2015 (**Table 1.3**). Region-wise, the growth is expected to be stronger in Asia and the Pacific and the Americas, followed by Europe. The projections for Africa and the Middle East are positive.

Table 1.3: International Tourist Arrivals: Actual Growth and Projection

Percent

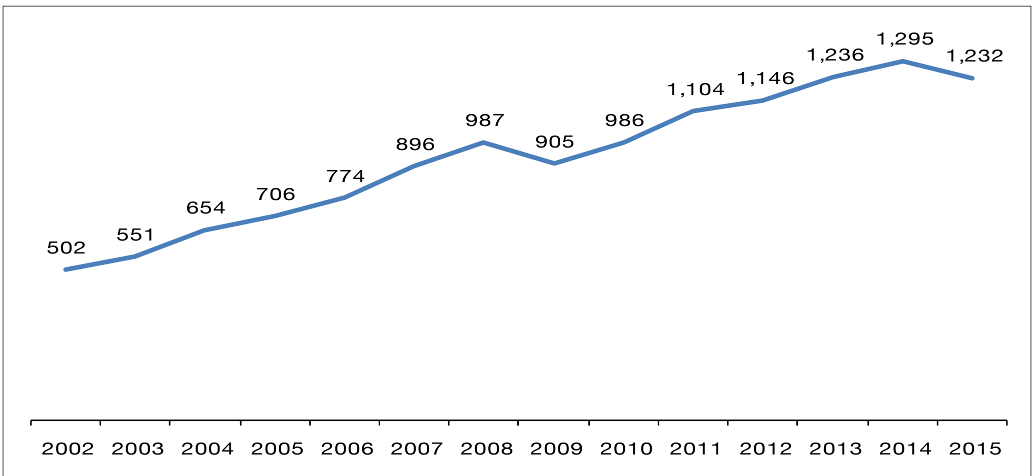
Region	Actual Growth 2015	Actual Growth Average 2005-2015	Projection 2016
World	**4.4**	**3.8**	**3.5 to 4.5**
Europe	4.9	2.8	3.5 to 4.5
Asia and the Pacific	5.0	6.2	4.0 to 5.0
Americas	4.9	3.5	4.0 to 5.0
Africa	-2.9	5.2	2.0 to 5.0
Middle East	2.8	5.1	2.0 to 5.0

Source: UNWTO World Tourism Barometer, various issues

According to the UNWTO World Tourism Barometer of May 2016, international tourism receipts reached USD 1,232 billion in nominal term in 2015 worldwide, lower than 1,295 billion recorded in 2014 (**Chart 1.2**). The decline in receipts is attributed to unusual strong exchange rate fluctuations which occurred in 2015. However, when accounted for exchange rate fluctuations and inflation, international tourism receipts increased by 3.6 percent. The growth rate of receipts is consistent with the increase in international tourist arrivals. This performance confirms the increasingly important role of the tourism sector in stimulating economic growth and contributing to international trade.

Chart 1.2: Global International Tourism Receipts, 2002-2015

In USD Billions



Source: UNWTO World Tourism Barometer, various issues

Looking at international tourism receipts by region, Europe, Asia and the Pacific, and Africa recorded a fall in receipts in 2015 largely attributed to strong appreciation of the US dollar against currencies of many countries in these regions, hence rendering receipts earned in currencies of those countries lower in current US dollar terms (**Table 1.4**). However, taking into account exchange rate fluctuations and inflation, receipts in the Americas, Asia and the Pacific and the Middle East each grew by 4.0 percent, while Europe grew by 3.0 percent and Africa by 2.0 percent.

Table 1.4: International Tourism Receipts by Region, 2007-2015

Region	2007	2008	2009	2010	2011	2012	2013	2014	2015
					Billions of USD				
Europe	434.3	472.0	410.8	409.3	466.3	454.0	491.7	512.9	448.1
Asia and the Pacific	186.7	209.0	203.9	255.2	298.7	329.1	360.7	420.1	418.9
Americas	171.7	188.5	165.5	181.0	198.4	212.9	264.4	274.0	277.2
Africa	29.5	30.2	28.8	30.4	32.9	34.3	35.1	36.2	33.2
Middle East	35.0	39.7	41.2	51.7	46.2	47.5	45.1	51.5	54.6
					Percentage change				
Europe	15.1	8.7	-13.0	-0.4	13.9	-2.6	8.3	4.3	-12.6
Asia and the Pacific	19.3	11.9	-2.5	25.2	17.0	10.2	9.6	16.5	-0.3
Americas	11.3	9.8	-12.2	9.4	9.6	7.3	24.2	3.6	1.2
Africa	19.4	2.4	-4.6	5.6	8.2	4.3	2.3	3.1	-8.3
Middle East	17.1	13.4	3.8	25.5	-10.6	2.8	-5.1	14.2	6.0

Source: UNWTO World Tourism Barometer, Various Issues

Alongside international tourism receipts (the travel item of the balance of payments), international tourism generated USD 210.0 billion in exports through international non-resident passenger transport services, bringing the total value of international tourism exports to USD 1,442 billion in 2015.

1.2 Tourism Developments in East Africa

The number of international tourist arrivals in Kenya continued with a downward trend, declining by 12.6 percent to 1,180,500 in 2015 from 1,350,400 in 2014. Likewise, tourism earnings declined by 13.4 per cent to USD 858.1 million from USD 990.7 million in the same period. The sector's suppressed performance was mainly due to security concerns that resulted from negative travel advisories from some European source markets and health concerns associated with spread of Ebola particularly in the West Africa in 2014. In Uganda, the number of international tourist arrivals increased by 2.9 percent to 1,302,802 in 2015 from 1,266,046 recorded in 2014.

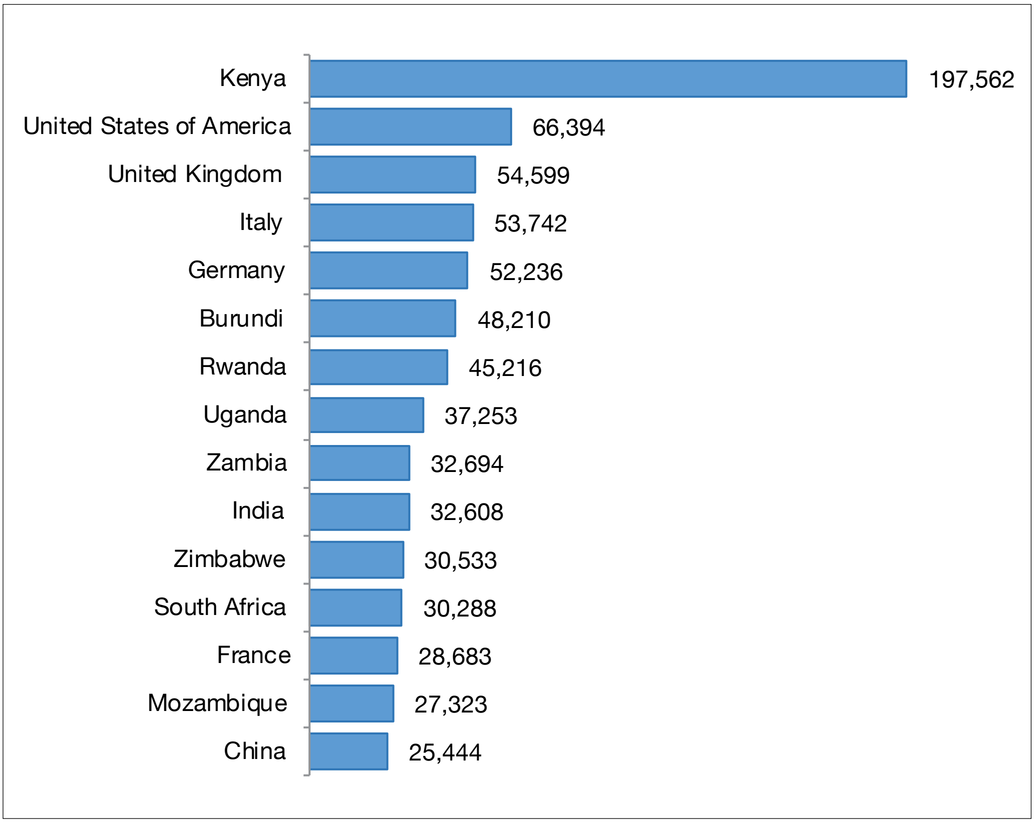
1.3 Tourism Development in Tanzania

The number of international tourist arrivals to Tanzania declined by 0.3 percent to 1,137,182 in 2015 from 1,140,156 registered in 2014. Consistent with this development, tourism earnings went down by 5.2 percent to USD 1,902.0 million in 2015 from 2,006.3 in 2014.

1.3.1 International Tourist Arrivals

According to Immigration statistics, Kenya continued to be the main source markets for tourists visiting Tanzania accounting for 17.4 percent of all visitors to Tanzania. When compared with 2014, visitors from Kenya increased by 5.0 percent to 197,562 (**Chart 1.3**). As it was in 2014, the United States of America and United Kingdom also continued to dominate the source markets for Tanzania accounting for 5.8 percent and 4.8 percent of all visitors, respectively. However, visitors from the United States of America and United Kingdom declined by 17.5 percent and 7.9 percent in 2015, respectively when compared with 2014. The composition of the top 15 source markets is not different from the one observed in 2014, with the exception of China that has joined the list replacing Netherlands. The appearance of China reflects an increase in business interactions between these two countries.

Chart 1.3: International Tourist Arrivals to Tanzania, Top 15 Source Markets, 2015



Source: Immigration Department, 2015

1.3.2 Promotion and Marketing

1.3.2.1 Launching of Tourism Portal

As the world is transforming to e-tourism, Tanzania Tourist Board has been able to successfully develop and officially launch a new destination website (Tourism Portal) on September 2015. H.E. President Jakaya M. Kikwete launched the destination portal. The destination portal (www.tanzaniatourism.com) provides a new platform with detailed information about destination Tanzania and its tourism products, as well sets a platform for Tanzania town stakeholders to promote their business, and tourists to get detailed information; book and purchase certain services online, all in a one – stop shop. It further enables tourists to conduct a prepay services for accommodation in Tanzania.

H.E. President Jakaya Mrisho Kikwete officially launching destination portal

1.3.2.2 Zanzibar Promotion Centre in India

In realizing the importance of India as an emerging market, Zanzibar Commission for Tourism (ZCT) has established a Zanzibar Promotion Centre in India which was officially launched on 1st April 2015. The centre has been tasked to create awareness about the destination and undertake all promotion strategies that will make Zanzibar popular in Asia through conducting roadshows, seminars and workshops, and participate in trade fairs and conduct familiarization (FAM) tours for the travel trade.

Minister responsible for Tourism Zanzibar Said Ali Mbarouk (middle) inspecting the office during the opening ceremony of the promotion centre in Mumbai, India.

1.3.2.3 Destination and Products Awareness

Focusing to increase the destination and products awareness, Tanzania Tourist Board coordinated various familiarization and educational trips for different international media houses, tour agents and journalists and participated in international road shows in different potential markets. The major road shows were organized in China and Switzerland. TTB also attended an investment forum in Dubai and two Presidential Investment Forum organized by the Tanzania Investment Centre (TIC) in Washington D.C, USA and Beijing, China, respectively. In addition, TTB together with TANAPA and NCAA organized familiarization and educational trips for a team of journalists from Public and Private Media houses from South Africa who made a three days' visit to Tanzania. They also organized for 51 journalists and tour operators from china to trek Mount Kilimanjaro as a commemoration of 50 years of Tanzania Independence.

1.3.2.4 Marketing Partnership

In the period between August 2014 – May 2015 Tanzania Tourist Board engaged in a marketing partnership with Sunderland Association Football Club (SAFC), focusing to attract tourists from across Europe and the rest of the world through the English premier league. Under this marketing campaign, destination Tanzania was promoted through various SAFC channels and medias such as SAFC stadium digital channels, magazines, social media and prematch outfits.

Promotion of 'Visit Tanzania' through stadium digital channels

1.3.3 New Accommodation Establishments

A new five stars Park Hyatt Zanzibar Hotel was opened in Zanzibar during 2015. The beachfront Park Hyatt Zanzibar Hotel is housed in the historic heart of Stone Town, a UNESCO World Heritage Site. This is the 36th Park Hyatt hotel worldwide. The establishment of Park Hyatt hotel will provide superior customer satisfaction through better quality of services and facilities in the country.

The official inauguration of Park Hyatt Hotel in Zanzibar

The new Ramada Resort was established in Dar es Salaam in 2015, which marks the 5th in Africa after Morocco, Ghana, Nigeria and Tunisia. The hotel has quality accommodation rooms and conference facilities which are suitable for all occasions.

Ramada Resort in Dar es Salaam

1.3.4 Tourism Trade Fair and Exhibitions

In 2015, Tanzania participated in several international tourism exhibitions outside the country with the aim of marketing and promoting Tanzania as a unique tourist destination. The main exhibitions include the World Travel Market (WTM) in London, the International Tourism Bourse (ITB) in Berlin, INDABA in South Africa, Borse Internationale de Tourisms (BIT) in Italy.

Tanzania Stand at ITB 2015

1.3.5 Establishment of Kilimanjaro Tourism and Trade Fair exhibition

Kilimanjaro Tourism and Trade Fair exhibition (KILI FAIR) is the third tourism exhibition to be established in Tanzania after the KARIBU FAIR and Swahili International Tourism Expo (S!TE). The exhibition focused on linking tourism partners and other stakeholders in the industry from both inside and outside the country, with the aim of promoting tourism in Tanzania and raising awareness of her tourist attractions. KILI FAIR was organized by Kili Fair Promotion Co. Ltd and officially inaugurated on 5th June 2015 in Moshi.

KILI FAIR in Moshi

1.3.6 International Flights

Etihad Airways, the National Airline of the United Arab Emirates, expanded its African route network with the launch of the daily flights between Abu Dhabi and Dar es Salaam on 1st December 2015. Etihad Airways operates using Airbus A320 aircraft with 16 Business Class and 120 Economy Class seats. Dar es Salaam is Etihad Airways' 110th destination globally, and its 11th destination in Africa and the Indian Ocean. The daily schedule offers two-way connectivity over Etihad Airways' hub in Abu Dhabi, with convenient onward connections to 45 popular destinations across the Middle East, Europe, the Indian Subcontinent, North and Southeast Asia, and Australasia. It is anticipated the new route will boost flow of tourists in the East African region.

For the case of Zanzibar, a Ukrainian charter airline (Wind rose Airlines) launched a weekly flight to Zanzibar effective from September 2015. The introduction of this direct flight to Zanzibar will help to boost leisure and business travel from the Ukraine and Russia to Zanzibar and thus contributing to economic and social development.

Ukrainian visitors disembarking at Abeid Amaan Karume International Airport

1.3.7 The Restoration Old Boma

Dar es Salaam City Council (DCC) in collaboration with the Architect Association of Tanzania (AAT) has refurbished the old BOMA building to become the one stop center for tourism and heritage. The centre is located along Morogoro road and Sokoine drive road and is designed to promote City tourism and diversify tourism activities in Dar es Salaam such as City Museums, Tourists Information Centre, tourists' restaurant and curio shops. The old boma building aims at promoting historical architecture of Dar es Salaam and it will become the centre for education, professional trainings, community outreach and public cultural events.

1.3.8 Satellite Elephant Monitoring in Ruaha National Park

Tanzania National Parks has launched a special program to tag 30 elephants in Ruaha National Park and Rungwa Game Reserve (Great Ruaha Landscape) to be monitored through the use of satellite system. The main goal of the monitoring exercise is to provide information on elephants' seasonal movement patterns, extent and distribution in the landscape which will help rangers to plan more informed patrols outside the core protected area. The elephants are therefore fitted with inbuilt mortality sensor; and in cases where a fitted elephant is killed a ranger will be informed through the Satellite GPS units distributed in Game Reserves and Wildlife Management Areas.

Conservation experts place collar on elephants

Chapter 2: Analysis of the Survey's Results

2.1 Introduction

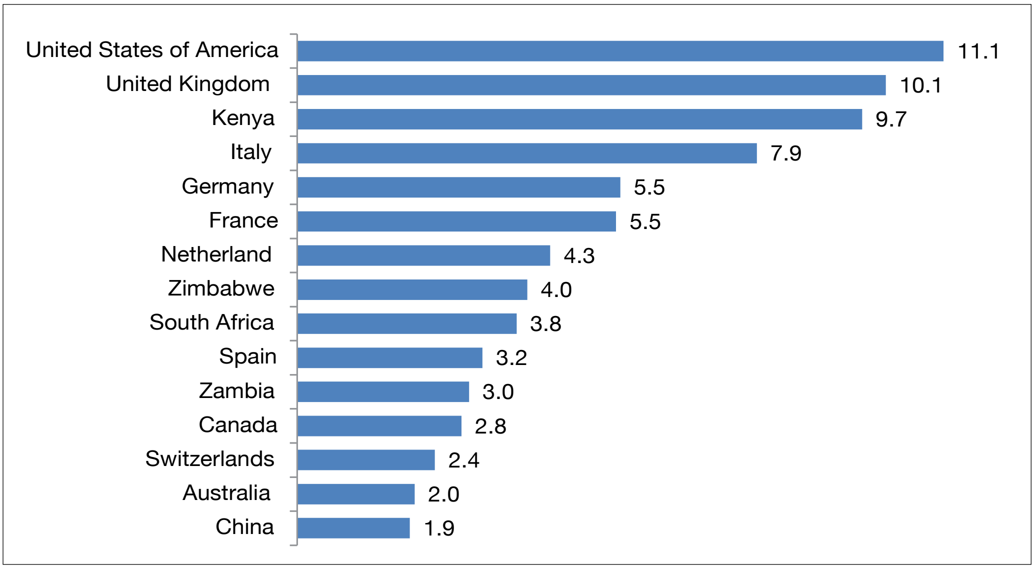
This chapter presents the analytical findings resulting from the 13th round of the international visitors' exit survey conducted in 2015. The findings are presented in a manner that can be of useful to various stakeholders including policy makers, planners, marketers, and researchers. The chapter provides details on where visitors to Tanzania come from, popular activities and areas visited, demographic structure and expenditure pattern, among others. Statistics are presented in tables, charts and graphics to provide a swift understanding of the issues being discussed.

2.2 Source Markets

The survey results show that there was an increase of 3.5 percent in the number of tourist who visited both Tanzania Mainland and Zanzibar compared to visitors received in 2014. The top 15 source markets accounted for 77.2 percent of the total visitors in 2015 compared to 82.0 percent reported in the previous survey (**Chart 2.1**). This implies that tourist source markets for Tanzania are becoming more diversified thanks to the Government efforts to increase promotion in nontraditional markets. The list of the top 15 source markets is similar to that of the previous survey with the exception of Uganda that has been replaced with Switzerland. The United States of America, United Kingdom and Italy continued to maintain the lead source markets accounting for 29.1 percent of the total visitors in 2015 lower from 35.5 percent reported in 2014. The findings also show a notable increase in the number of visitors from Kenya which increased its share from 4.8 percent in 2014 to 9.7 percent making it the third largest source market for Tanzania in 2015. Position of Kenya is largely associated with its proximity to Tanzania as well as increased business relations. It is worth noting that Kenya is one of the major sources of foreign private investments in Tanzania particularly in the finance and insurance activities. Results show that most Kenyans come to Tanzania to visit their friends and relatives most of whom are working in these activities.

Chart 2.1: Top 15 Source Markets for the United Republic of Tanzania

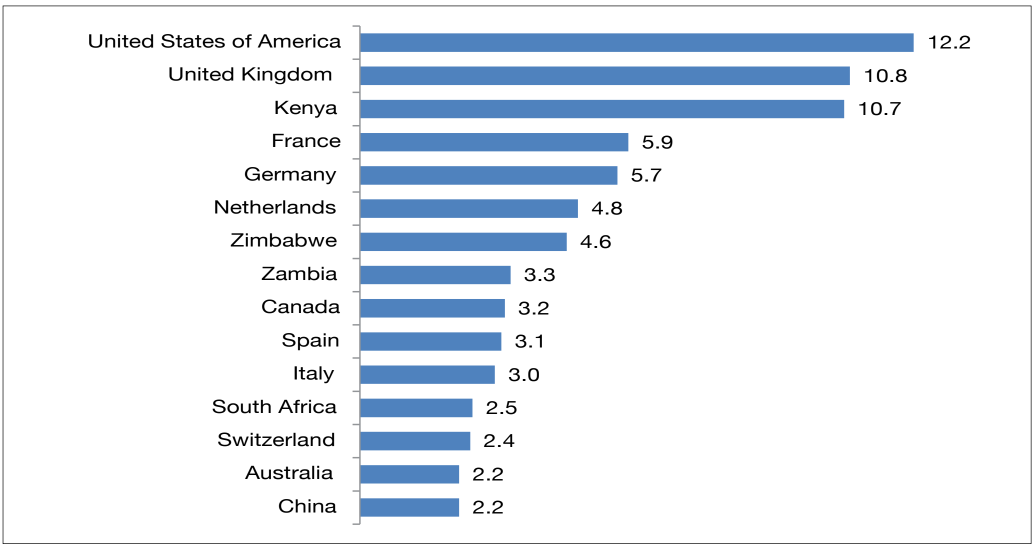
Percent



The top 15 source markets for Tanzania Mainland is similar to that of URT with slight changes in positions of some countries. For instance, Italy which appears the fourth largest source market under URT, occupies 10th position in Tanzania Mainland largely due to its prominence in Zanzibar (**Chart 2.2**). The top 15 source markets in Tanzania Mainland accounted for 76.5 percent of all visitors in 2015 compared to 80.8 percent reported in 2014.

Chart 2.2: Top 15 Source Markets for Tanzania Mainland

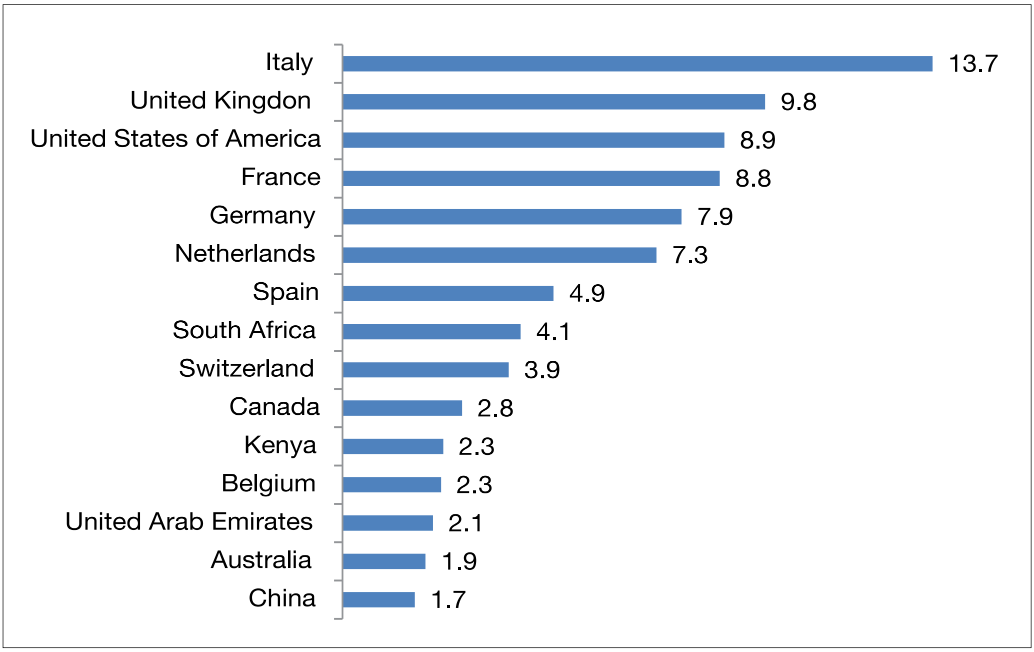
Percent



In the case of Zanzibar, the source markets are also more diversified than in the previous survey as the top 15 source markets accounted for 82.4 percent in 2015 compared to 87 percent in 2014. Similarly, the list of the top 15 source markets remained unchanged with the exception of Denmark, which has now been replaced by the United Arab Emirates (**Chart 2.3**).

Chart 2.3: Top 15 Source Markets for Zanzibar

Percent

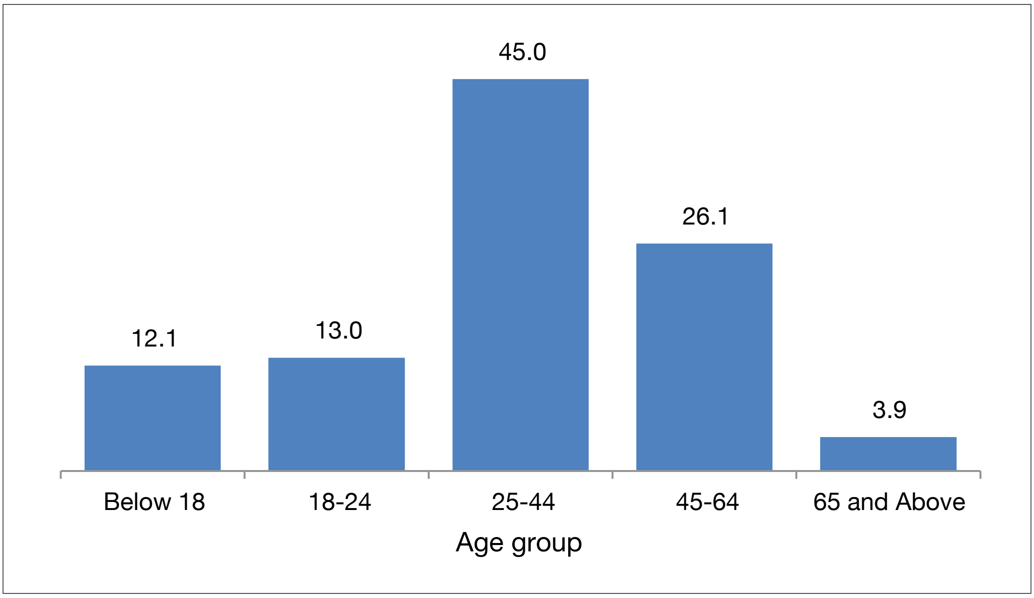


2.3 Age Group

Survey findings show that the age profile of tourists who came to Tanzania in 2015 is unevenly distributed from persons below 18, 18-24, 25-44, 45-64 and above 65 age groups (**Chart 2.4**). Similar to the previous surveys, most tourists (45 percent) were in the 25-44 age group followed by those at 45 - 64 age group. The number of senior citizen with 65 years of age and above continued to decline as their share dropped from 6 percent recorded in 2014 to 3.9 percent in 2015. Further, the results show a notable increase in the share of visitors with below 18 years of age, an increase of 10.8 percentage point from 1.3 percent recorded in 2014.

Chart 2.4: Age Group

Percent



Similar to the previous surveys, majority of the visitors (65 percent) came for leisure and holidays and were mostly in the age group of 25-44. Second in prominence were visitors in the 45–64 years' age group. The least number of visitors in this purpose were 65 years and above (**Table 2.**1).

Table 2.1: Age Group and Purpose of Visit, United Republic of Tanzania, 2015

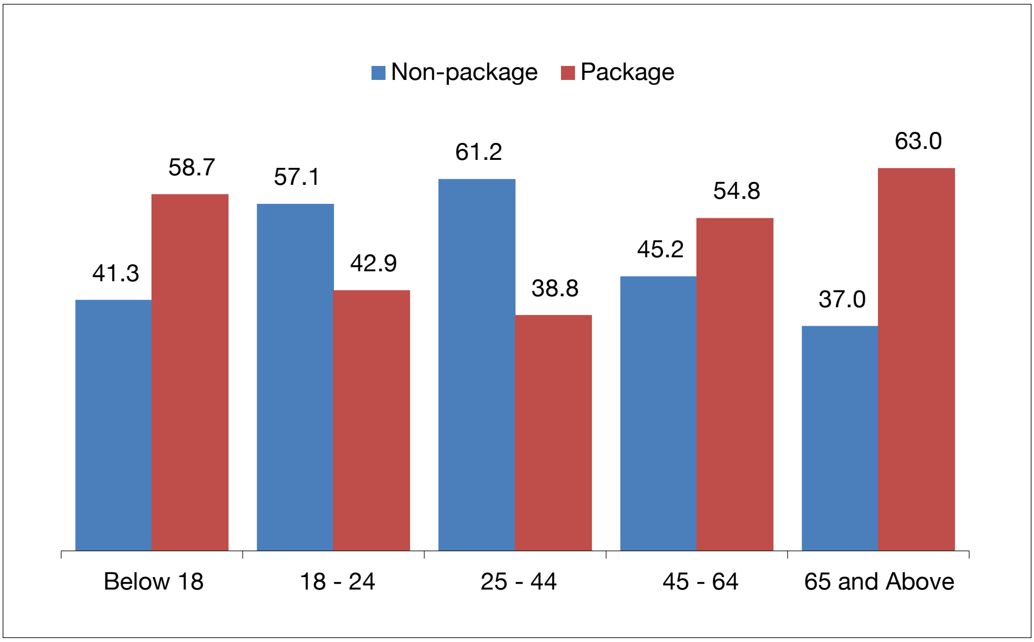
Percent

Age group	Purpose of visit							Grand total
	Business	Leisure and holidays	Meeting and conference	Scientific and academic	Visiting friend and relatives	Volunteering	Other	
Below 18	0.0	76.2	0.0	0.0	18.7	2.8	2.3	100
18 - 24	5.2	61.0	1.6	3.2	19.9	8.2	1.0	100
25 - 44	16.4	59.2	6.3	0.8	14.7	1.4	1.2	100
45 - 64	8.8	69.4	6.2	0.9	12.2	1.4	1.2	100
65 and Above	5.4	73.4	5.2	0.8	12.4	1.8	1.0	100

Generally, slight majority of visitors have higher preference for package tour than non-package tour (51.7 percent). However, as shown in **Chart 2.5**, visitors below 18 years' age group and those of 45-year-old and above have higher preference for package tour. The country stands to benefit more from visitors with non-package tour arrangement as they tend to spend more at destination compared to those under package tour arrangement. This cements the earlier observation regarding the need to develop products more suited to the age group 25-44 not only because they have higher preference for holiday making but also most of them come under the non-package tour arrangement.

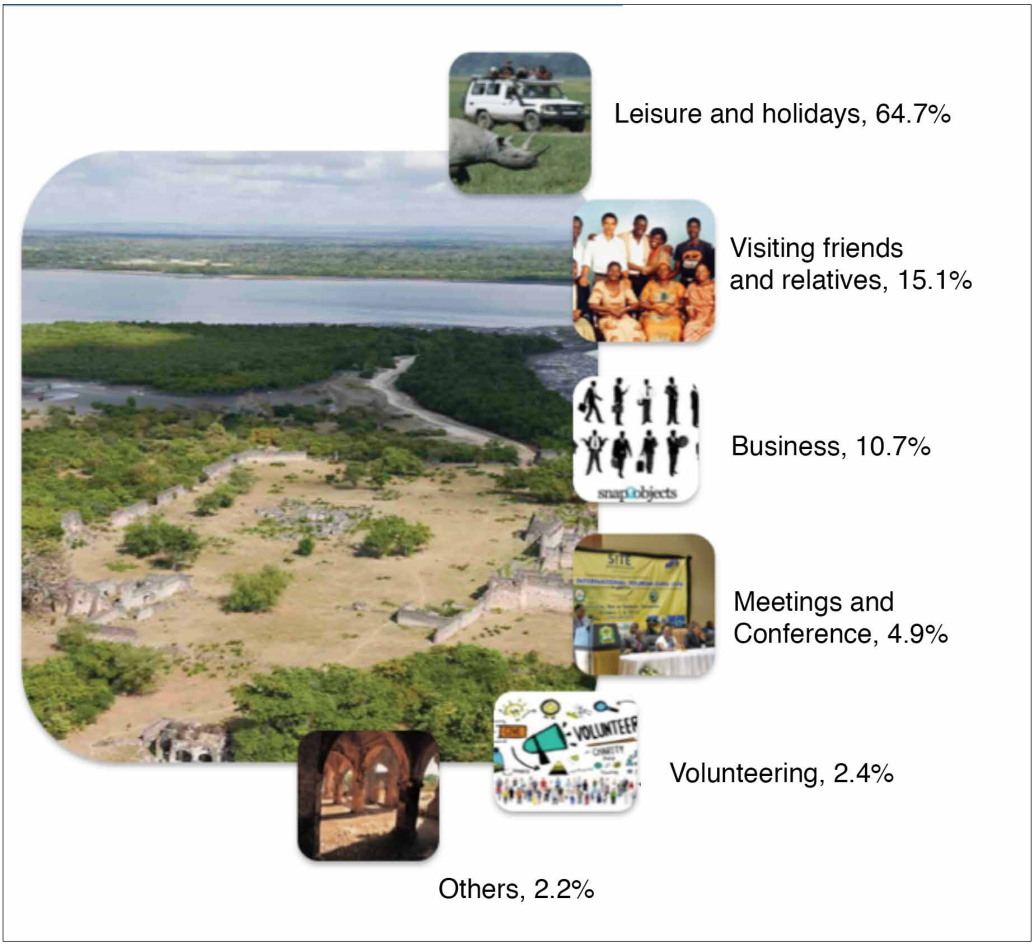
Chart 2.5: Age group and Tour Arrangement, United Republic of Tanzania, 2015

Percent



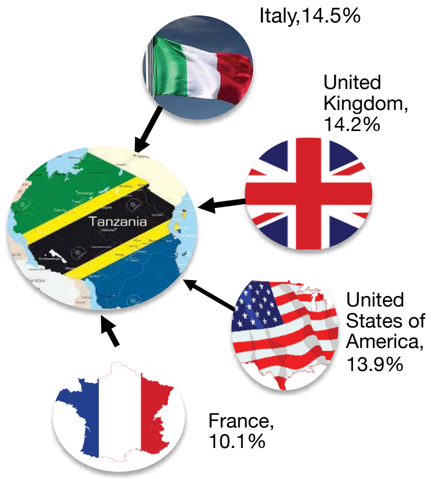
2.4 Purpose of Visit

Out of 15,515 surveyed visitors, majority came for leisure and holidays, visiting friends and relatives as well as business. Other visitors came for meetings and conference, volunteering and other purposes. The dominance of visitors who came for leisure and holiday is associated with the country's endowment of variety of exquisite tourist attractions including national parks, mountains and cultural and historical sites. The trend is more or less the same as 2014 survey results.

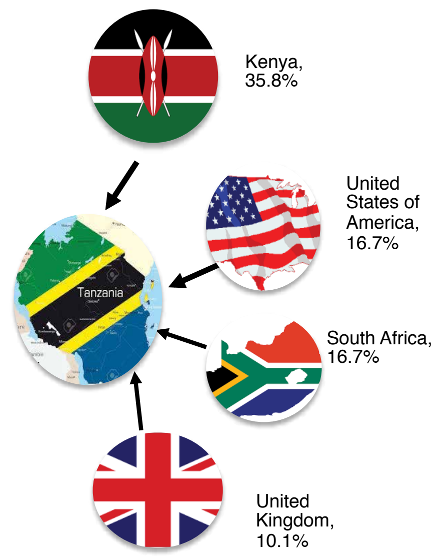
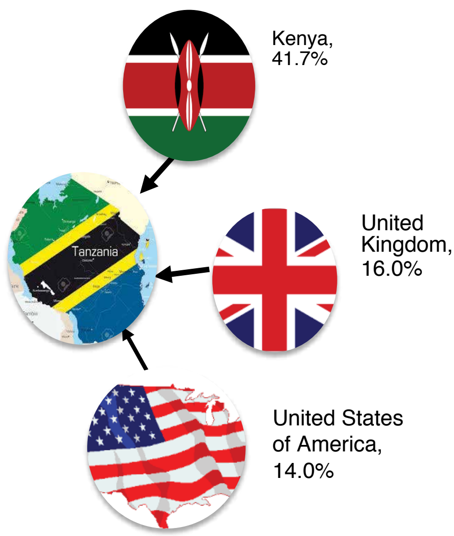


Note: *Other purposes include missionaries, transit, scientific and academic.*

Further analysis show that most of visitors from Italy, the United States of America, the United Kingdom and France came for leisure and holidays. Visitors from Zimbabwe, Zambia and Kenya dominated in the business category. The prominence of Zimbabwe and Zambia is largely explained by strategic location of Tanzania whereby these visitors come to clear vehicles at the Dar es Salaam port and for business purposes. The dominance of business visitors from Kenya is partly explained by the fact that it is one of the major sources of foreign private investments in Tanzania.

Leisure and holidays	Business
	

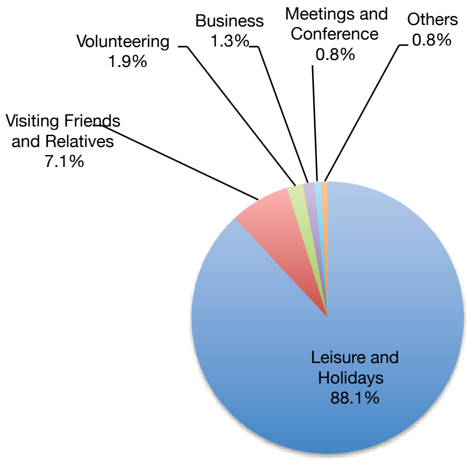
The results also show that visitors who came for meetings and conference where mostly from Kenya, South Africa and the United States of America. Majority of tourists from Kenya, the United Kingdom and the United States of American also came to visit friends and relatives (VFR). The dominance of Kenya in the VFR category is largely associated with its proximity with the country.

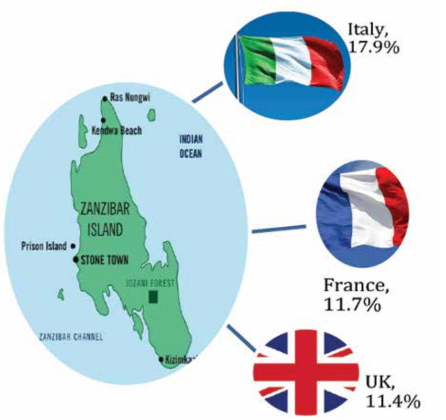
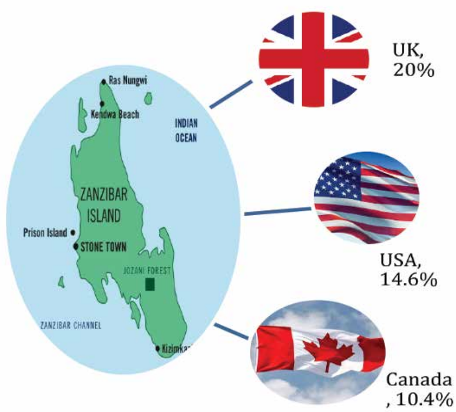
Meetings and conference	Visiting friends and relatives
	

Visitors by purpose and country of residence, URT 2015

Out of 7,562 visitors surveyed in Zanzibar, 88.1 percent came for leisure and holidays, followed by 7.1 percent who came for visiting friends and relatives, the remaining visitors came for business, meetings and conference and other purposes such as volunteering, transit and religious missions. The dominance of holiday visitors is not surprising, as Zanzibar is known for its exotic nature, cultural and historical sites and notwithstanding her sandy white beaches. Majority of visitors who come for holiday are from Italy, France and the United Kingdom. Similarly, visitors from the United States of America, the United Kingdom and Canada came mostly to visit with friends and relatives.

Chart 2.6: Purpose of Visit in Zanzibar



<table>
<tr><th>Leisure and holidays</th><th>Visiting friends and relatives</th></tr>
<tr><td>
</td><td>
</td></tr>
</table>

Visitors by purpose and country of residence, Zanzibar 2015

2.5 Travel Arrangement

The survey results indicate that, majority of the visitors came under the non–package tour arrangement (53.1 percent) and the rest came under the package tour arrangement (46.9 percent). The same pattern was revealed in 2008 and 2011 surveys.

Table 2.2 indicates that out of all visitors who came under the package tour arrangement, most of them were from Italy (14.3 percent) followed by the United States of America and the least number were from Zambia (0.2 percent). With respect to non-package tour arrangement, the greatest number of visitors was from Kenya (16.7 percent) followed by the United States of America and the least number were from Australia (1.1 percent).

Table 2.2: Visitors by Travel Arrangement 2015, URT

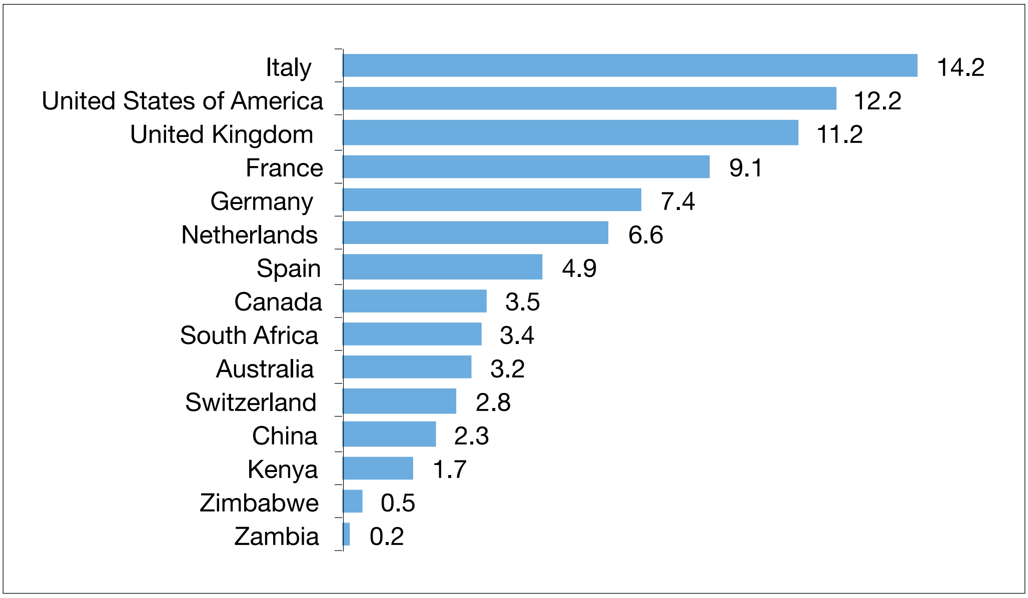
Percent

Country of Residence	Tour Arrangement	
	Package	Non-Package
United States of America	12.5	9.9
United Kingdom	11.4	9.0
Kenya	1.7	16.7
Italy	14.3	2.3
Germany	7.4	3.9
France	9.1	2.3
Netherlands	6.6	2.3
Zimbabwe	0.5	7.0
South Africa	3.4	4.1
Spain	4.9	1.6
Zambia	0.2	5.4
Canada	3.5	2.2
Switzerland	2.8	2.0
Australia	3.0	1.1
China	2.3	1.6
Others	16.3	28.5
Total	**100.0**	**100.0**

Looking at source markets by travel arrangement, **Chart 2.7** indicates that Italy was the leading source market under the package tour arrangement followed by the United States of America and the United Kingdom. The least countries in the list of top 15 source markets for the package tour arrangement were Kenya, Zimbabwe and Zambia.

Chart 2.7: Top 15 Source Markets and Package Tour Arrangement, URT

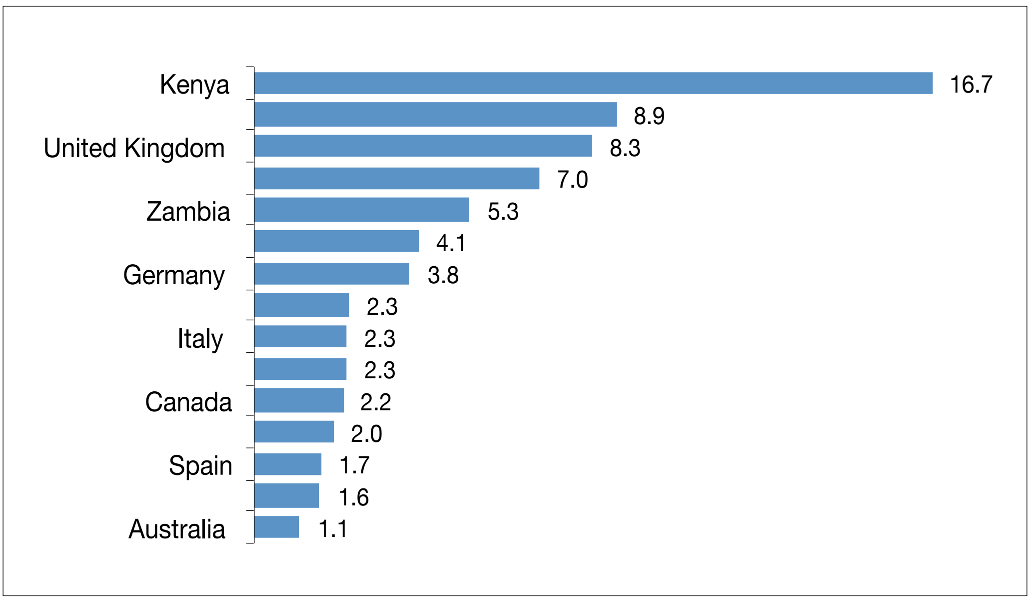
Percent



Kenya was the leading country in terms of source markets for non–package tour arrangement, followed by the United States of America and the United Kingdom. Countries with the least number of visitors under the non–package tour arrangement were Spain, China, and Australia (**Chart 2.8**).

Chart 2.8: Top 15 Source Markets and Non-Package Tour Arrangement, URT

Percent



The survey findings reveal that, majority of the visitors who came under the package tour arrangement from each of the country were holiday makers with the exception of Zimbabwe and Zambia (**Table 2.3**). More than half of the business visitors came from Zimbabwe. Visitors from Kenya and Zambia under this travel arrangement came mainly for meetings and conference. Those who came to visit friends and relatives were mainly from Kenya and the United States of America. Canada and the United States of America brought more visitors for volunteering.

Table 2.3: Source Markets and Purpose of Visit under Package Tour Arrangement, URT

Percent

Country of Residence	Purpose of Visit						
	Business	**Leisure and holidays**	**Meetings and conference**	**Visiting friends and relatives**	**Volunteering**	**Other**	**Total**
United States of America	1.1	82.4	2.4	4.4	6.2	3.5	100
United Kingdom	0.8	91.8	1.0	3.0	3.1	0.2	100
Kenya	6.3	52.4	28.6	11.9	0.0	0.8	100
Italy	0.9	96.6	0.0	2.1	0.0	0.4	100
Germany	0.2	97.2	0.2	2.0	0.4	0.0	100
France	0.2	99.1	0.2	0.5	0.2	0.0	100
Netherlands	0.2	97.7	0.4	1.0	0.4	0.2	100
Zimbabwe	57.6	42.4	0.0	0.0	0.0	0.0	100
South Africa	5.2	87.1	5.6	2.0	0.0	0.0	100
Spain	0.0	96.7	0.0	0.3	2.8	0.3	100
Zambia	15.4	30.8	46.2	0.0	0.0	7.7	100
Canada	0.4	89.9	0.4	1.2	7.8	0.4	100
Switzerland	0.5	96.1	0.5	2.9	0.0	0.0	100
Australia	0.0	98.6	0.5	0.9	0.0	0.0	100
China	0.6	92.8	0.0	2.4	3.0	1.2	100
Others	1.1	93.3	1.1	1.8	2.4	0.3	100
Total	**1.2**	**92.4**	**1.5**	**2.2**	**2.1**	**0.7**	**100**

The survey findings show that, majority of the visitors who came under the non-package tour arrangement from each of the country were holiday makers with the exception of Kenya, Zambia and Zimbabwe while visitors from Zambia and Zimbabwe dominated in the business category (**Table 2.4**). Most of the visitors who came for meetings and conference were from South Africa, Kenya and China. Visitors from Kenya, Canada and the United Kingdom led the list in visiting friends and relatives. Those who came for volunteering were mainly from Spain, the United States of America and Canada.

Table 2.4: Source Markets and Purpose of Visit under Non-Package Tour Arrangement, URT

Percent

Country of Residence	Purpose of Visit						
	Business	**Leisure and holidays**	**Meetings and Conference**	**Visiting friends and relatives**	**Volunteering**	**Other**	**Total**
United States of America	8.1	43.9	8.5	22.5	8.8	8.2	100
United Kingdom	5.8	50.6	6.4	31.1	3.7	2.4	100
Kenya	13.2	24.5	11.5	47.1	0.4	3.3	100
Italy	0.5	83.0	1.6	6.9	6.4	1.6	100
Germany	5.0	58.4	10.0	22.2	3.4	0.9	100
France	3.2	81.4	2.7	10.1	0.5	2.1	100
Netherlands	3.1	66.8	3.1	24.4	1.0	1.6	100
Zimbabwe	79.3	10.7	2.1	5.5	0.0	2.4	100
South Africa	22.8	38.9	22.8	12.2	0.3	3.0	100
Spain	2.2	74.8	0.7	4.4	17.0	0.7	100
Zambia	72.4	5.6	2.0	13.0	0.0	7.0	100
Canada	4.4	47.2	4.4	34.4	7.2	2.2	100
Switzerland	3.1	78.4	1.9	13.6	2.5	0.6	100
Australia	12.9	59.1	6.5	12.9	8.6	0.0	100
China	11.2	63.4	10.4	4.5	7.5	3.0	100
Others	14.9	40.4	8.6	31.0	1.7	3.4	100
Total	**19.1**	**40.2**	**7.9**	**26.5**	**2.8**	**3.5**	**100**

For Zanzibar, the findings indicate that like in the previous surveys majority of visitors came under the package tour arrangement (63 percent), while the rest (37 percent) came the under the non-package tour arrangement**.** Italy was the leading country that brought majority of visitors under the package tour arrangement, followed by France and the United Kingdom. The lowest number of visitors who came under the package tour arrangement was from the United

Arab Emirates. With respect to the non–package tour arrangement, the highest number of visitors was from the United States of America followed by the United Kingdom and Germany and the lowest was from China.

Table 2.5: Visitors by Travel Arrangement, 2015, Zanzibar

Percent

	Tour Arrangement	
Country of Residence	**Package**	**Non-Package**
Italy	19.0	4.6
United Kingdom	9.4	10.6
United States Of America	6.9	12.3
France	10.8	5.2
Germany	8.2	7.3
Netherlands	9.0	4.3
Spain	5.7	3.5
South Africa	4.2	4.0
Switzerland	3.7	4.2
Canada	2.1	3.9
Kenya	1.0	4.7
Belgium	2.5	2.0
United Arab Emirates	0.6	4.7
Australia	2.0	1.8
China	1.8	1.5
Others	13.1	25.5
Total	**100**	**100**

2.6 First-Time and Repeat Visits

The survey's findings indicate that 52.6 percent of the respondents were first-time visitors compared to 56 percent in the previous survey. Out of the total first-time visitors, 56.0 percent came under the package tour arrangement while the rest used the non-package tour arrangement. The majority of the repeat visitors (86.6 percent) came under the non–package tour arrangement (**Chart 2.9**). Majority of First-time visitors prefer the package tour arrangement because in most cases, they are not familiar with the destinations.

Chart 2.9: First-time and Repeat Visitors, URT

Percent

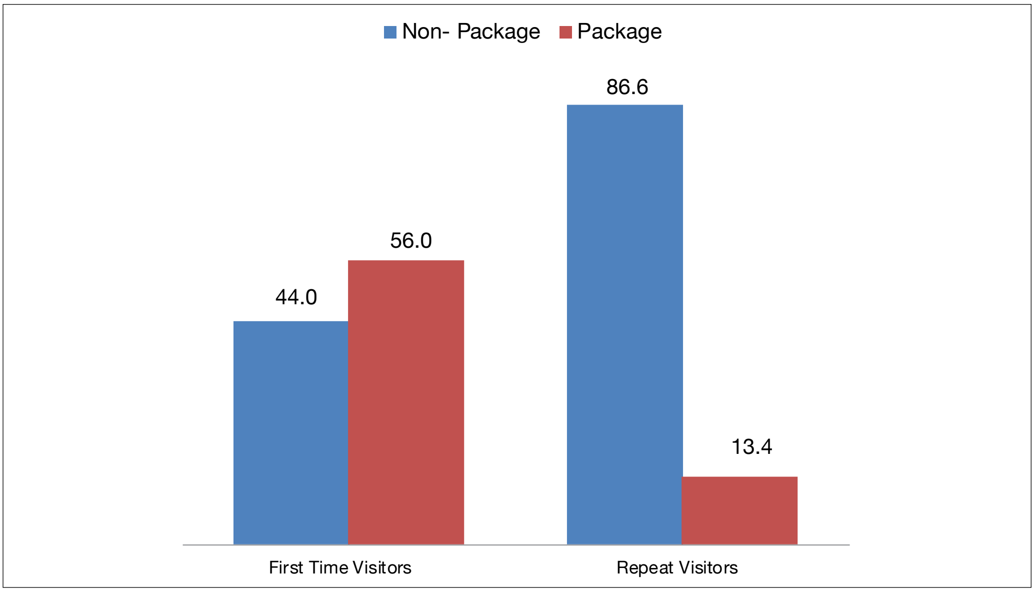
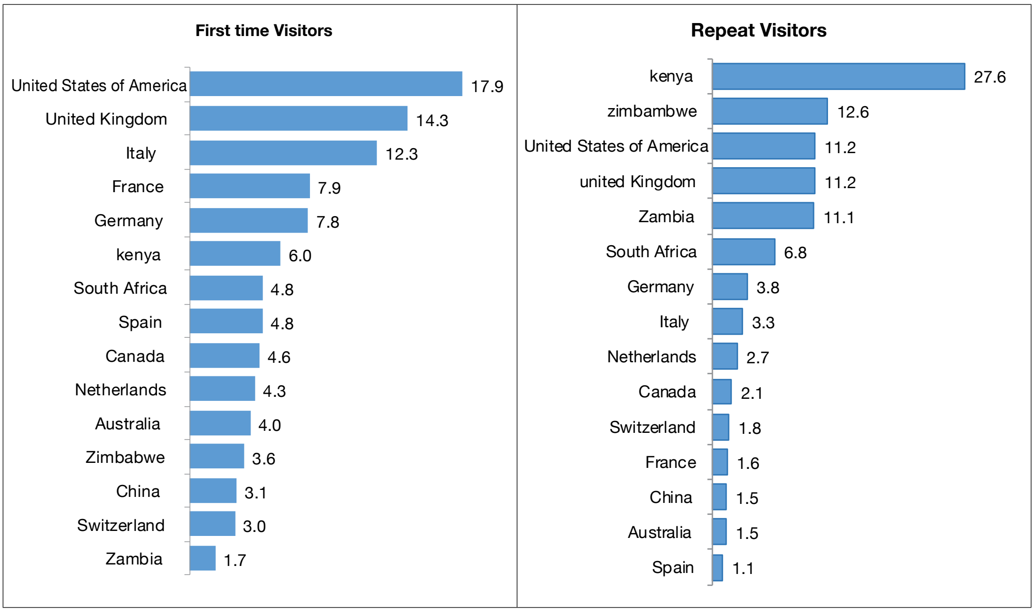


Chart 2.10 shows that majority of visitors from top 15 source markets were First-time visitors with the exception of Netherlands, Switzerland and Zambia.

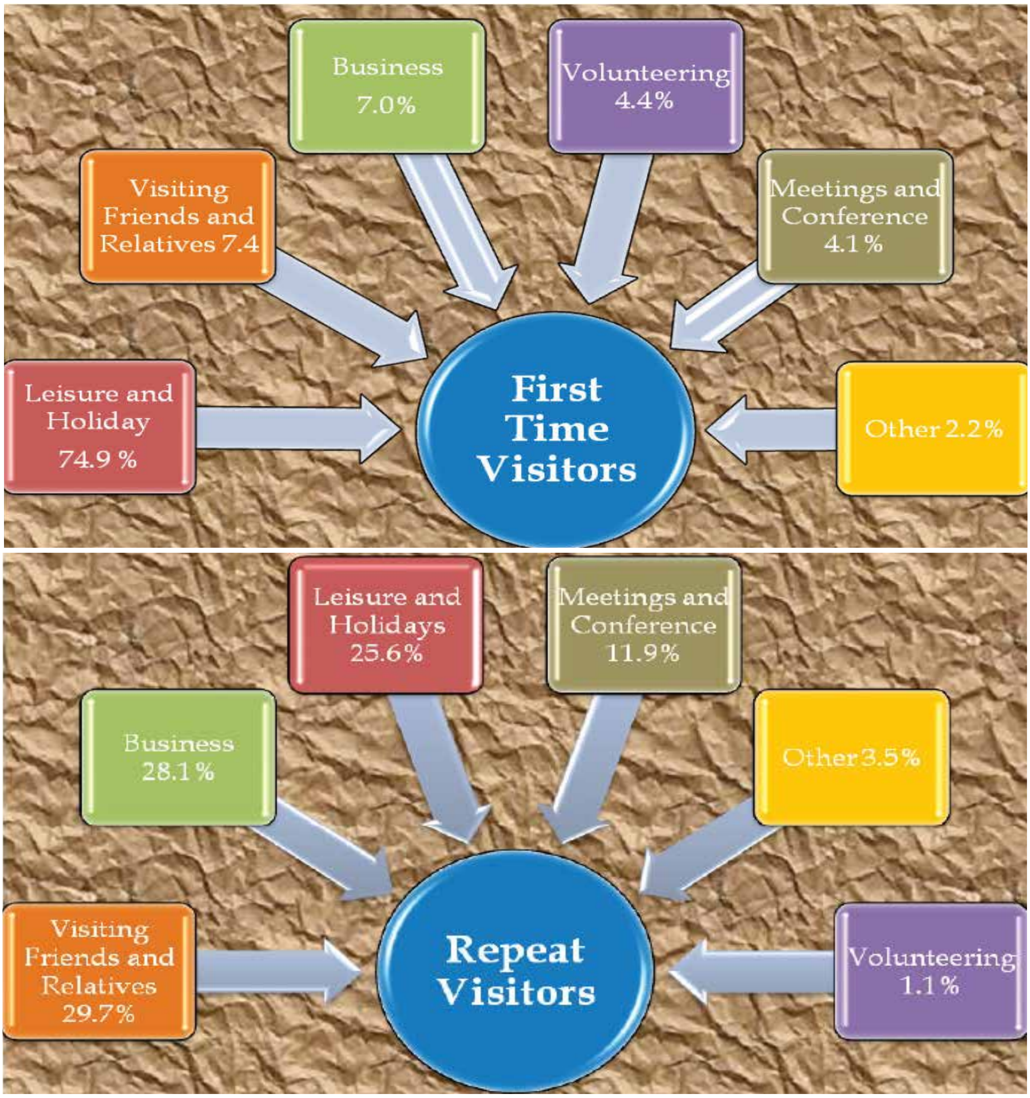
Chart 2.10: Proportional of First-time and Repeat Visitors by Source Markets, URT

Percent



The survey findings reveal that, almost three–quarters of all First-time visitors came for leisure and holiday, whereas the least came for other purposes such as scientific and academic. On the other hand, about 30 percent of repeat visitors came for visiting relatives and friends and this was followed by those who came for business. Volunteering category had the lowest percent of repeat visitors (**Chart 2.11**).

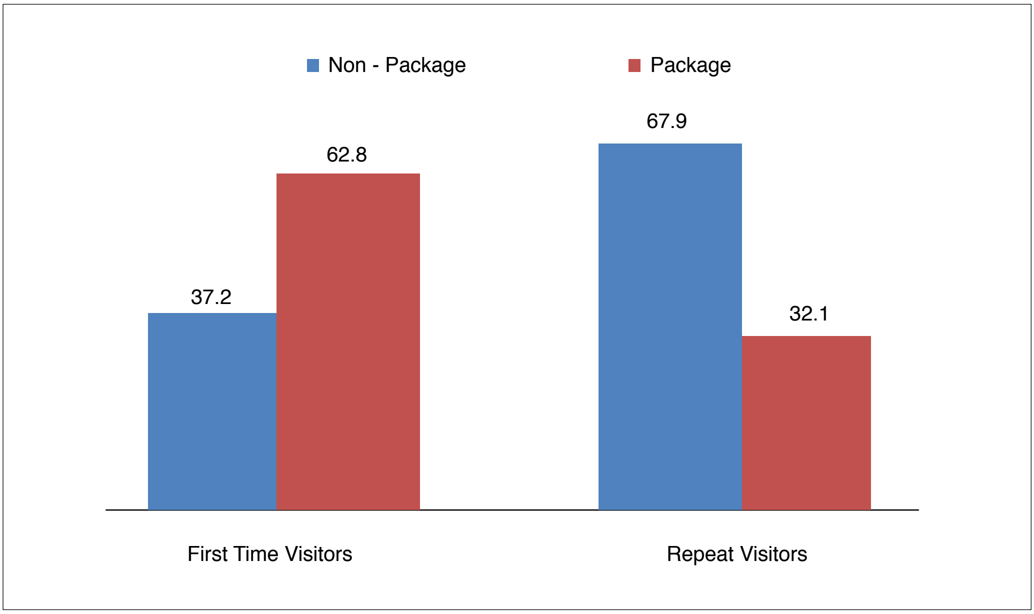
Chart 2.11 First-time and Repeat Visitors by Purpose of Visit, URT



Majority of tourists who visited Zanzibar in 2015 were First-time visitors and mostly used the package tour arrangement; whereas majority of repeat visitors came under the non–package tour arrangement (**Chart 2.12**).

Chart 2.12: First-time and Repeat Visitors by Tour Arrangements, Zanzibar

Percent



Majority of both the first-time and repeat visitors came for leisure and holiday, while the smallest number of first-time and repeat visitors came for other purposes and meetings and conference, respectively (**Chart 2.13**)

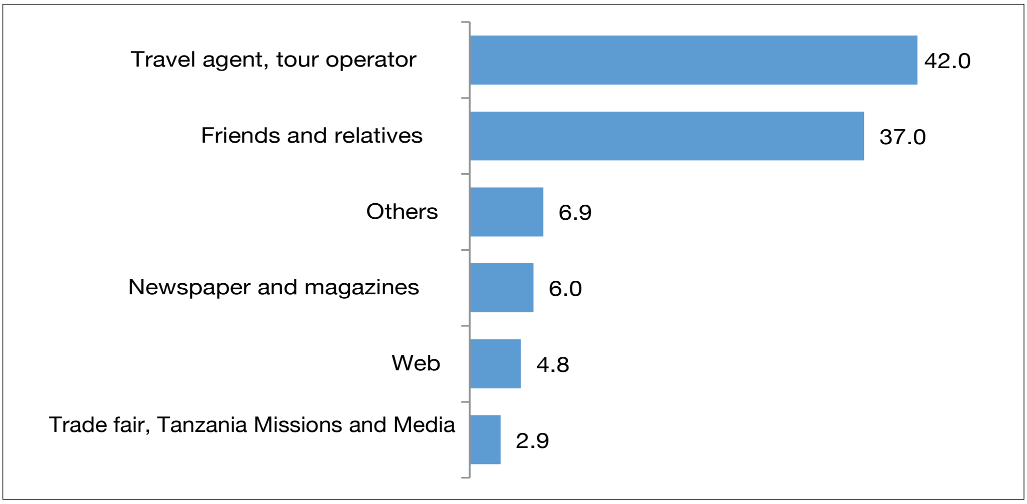
Chart 2.13: First-time and Repeat Visitors by Purpose of Visit, Zanzibar

2.7 Source of Information

During the 2015 survey, 41.8 percent of all visitors responded that travel agents and tour operators were the main source of information about Tanzania; followed by those who heard from word of mouth from friends and relatives (**Chart 2.14**). Visitors who heard about Tanzania through travel agents and tour operators were mostly from Italy, the United Kingdom, United States of America and France, while those who received information through friends and relatives were from Kenya, the United Kingdom and the United States of America. Newspapers, magazines and brochures and web were also equally important sources of information. Other sources of information were Tanzania's missions abroad, trade fairs, radio stations, television networks, travel guide books and through work/business.

Chart 2.14: Source of Information about Destination Tanzania, 2015

Percent

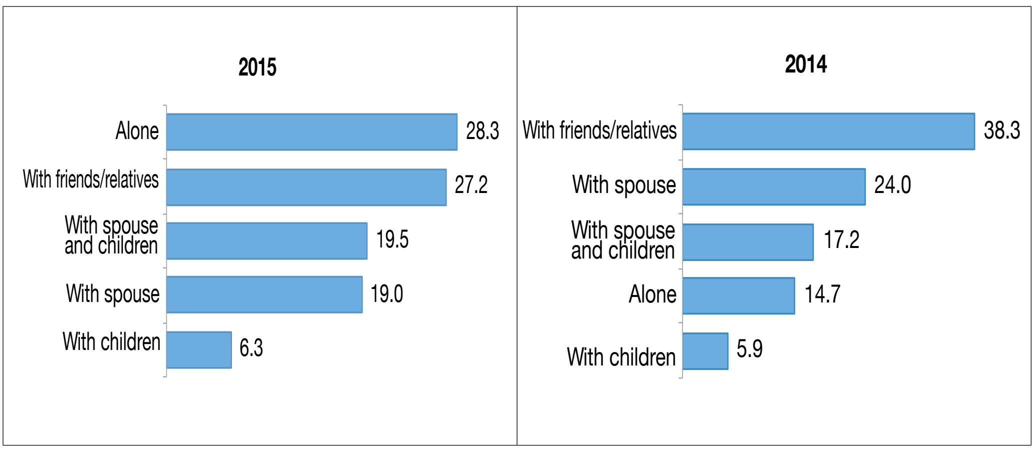


2.8 Travel Party

Majority of visitors (28.3 percent) during this survey travelled alone, which is an increase of 13.6 percentage point compared to the 2014 survey, followed by visitors travelled with friends and relatives. Those travelled with children continue to be the least. (**Chart 2.15**).

Chart 2.15: Visitors by Travel Party

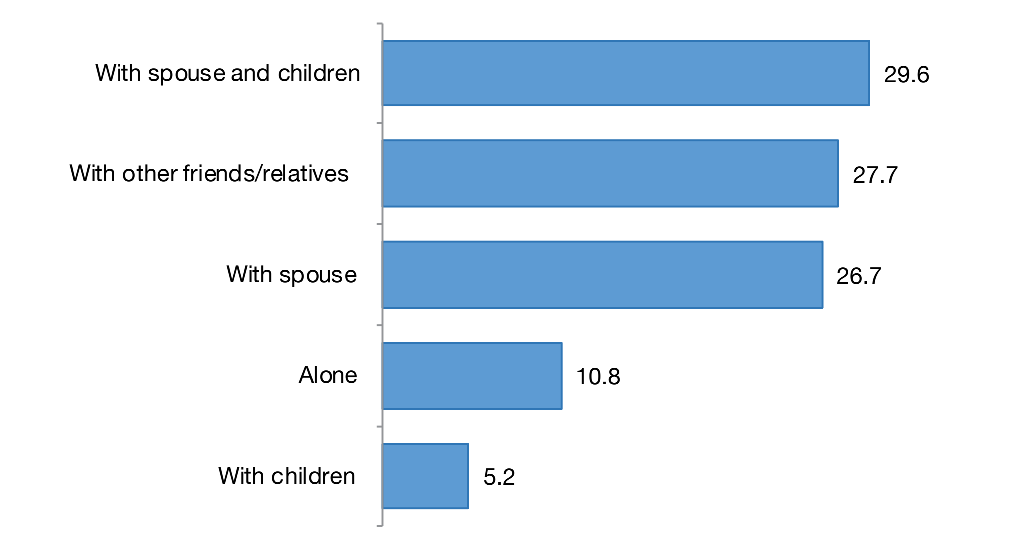
Percent



On the contrary, in Zanzibar, visitors travelled with spouse and children constituted the largest proportion, followed by those travelling with friends and relatives. Same trend as URT those travelled with children remained the least (**Chart 2.16**).

Chart 2.16: Visitors by Travel Party, Zanzibar

Percent



2.9 Departure Points

The 2015 survey covered eight departure points; three airports and five border posts. Large proportion of visitors (77.7 percent) departed through airports (**Table 2.6**). The dominance of airports as departure points is largely explained by the fact that most of visitors to Tanzania are from long haul destinations. There is a slight proportion increase of visitors who uses land border posts by 0.1 percent in the 2015 Survey from 22.3 percent recorded in 2014 Survey. Usually, large number of visitors who uses land border posts came from the neighboring countries, i.e. Zambia, Kenya, Uganda, and Zimbabwe.

Table 2.6: Departure Points

Departure points	Visitors	Percent
JNIA	6,376	41.1
AAKIA	3,949	25.5
KIA	1,715	11.1
NAM	1,099	7.1
HOR	961	6.2
TUN	917	5.9
MANY	293	1.9
MTK	205	1.3
Total	**15,515**	**100**

Table 2.7 portrays that, AAKIA continues being the leading in handling the largest volume of visitors who came for leisure and holiday by 37.6 percent as compared with other departure points. KIA and JNIA took the second and third volume of visitors who came for leisure and holiday purposes. This is associated with availability and connectivity of many international airlines coming to Tanzania and existence of diversity of tourist attractions, i.e. sandy beaches, national parks etc. Likewise, visitors departed via KIA who came for scientific and academic; and meetings and conferences led by a proportion of 48.5 percent and 78.7 percent respectively. Tunduma border point continued to be the most departure point for business visitors with the share of 45.5 percent. This is constituted with Dar es Salaam being the commercial hub where most of Zimbabweans and Zambians purchase their commodities at Kariakoo market and collect imported goods through Dar es Salaam Port.

Table 2.7: Proportion of Visitors by Departure Points and Purpose of Visit

	Purpose of the Visit (Percent)							
Departure points	Business	Leisure and Holidays	Meetings and Conference	On Transit	Scientific and Academic	Visiting Friends and Relatives	Volunteering	Other
AAKIA	1.4	37.6	2.2	0.0	2.9	4.4	6.8	3.2
NAM	5.1	2.3	4.7	6.8	2.3	25.1	0.8	11.7
KIA	37.2	36.1	78.7	27.4	48.5	50.5	52.9	54.3
JNIA	1.9	13.4	5.8	0.0	41.5	3.8	34.7	5.3
HOR	5.5	0.4	1.2	6.8	0.0	6.1	0.0	0.0
MTK	2.2	0.3	2.8	27.4	1.8	3.4	0.0	9.6
MANY	1.1	9.3	4.2	1.4	1.8	3.9	4.7	5.3
TUN	45.5	0.6	0.4	30.1	1.2	2.8	0.0	10.6
Total	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Total Visitors (Absolute)	**1,660**	**10,035**	**759**	**73**	**171**	**2,343**	**380**	**94**

2.10 Average Length of Stay

Indicator on the length of stay for the visitors was derived from the number of nights spent in the country. The survey results revealed that an overall average length of stay of visitors to URT was 10 nights (**Table 2.8**). For a period of past five years the length of stay remained unchanged at 10 nights. Visitors from Netherlands had longest length of stay of 16 nights followed by visitors from Germany and Spain who stayed for 13 nights. This is partly attributable to the location of these source markets which are long haul destination. On the other hand, most of neighbour countries such as Zimbabwe and Zambia spent minimal length of stay of 5 nights. In addition, visitors to URT who came under business purposes spent only 6 nights. Leisure and holiday makers to URT recorded an average length of stay of 10 nights while those who came to visit friends and relatives and other visitors spent 12 nights.

Table 2.8: Length of Stay by Purpose of Visit and Top 15 Source Markets, URT

Country of Residence	Business	Leisure and Holidays	Visiting Friends and Relatives	Other	Average
United States of America	8	10	10	14	**11**
United Kingdom	7	13	13	17	**12**
Kenya	5	5	8	5	**6**
Italy	8	11	10	11	**10**
Germany	7	13	16	18	**13**
France	6	13	13	10	**11**
Netherlands	7	15	20	23	**16**
Zimbabwe	4	4	5	6	**5**
South Africa	5	7	7	4	**6**
Spain	4	11	17	15	**13**
Zambia	4	6	5	4	**5**
Canada	11	12	14	12	**12**
Switzerland	5	14	14	18	**12**
Australia	5	10	16		**10**
China	7	9	8	11	**9**
Average	**6**	**10**	**12**	**12**	**10**

Table 2.9 indicates that average length of stay for Zanzibar visitors was 6 nights. When compared with the previous surveys, the pattern for the length of stay has remained unchanged for the past five years. Visitors from Italy, Netherlands, Switzerland and China recorded average length of stay of 7 nights. The other countries recorded an average of between 4 to 6 nights. In terms of purpose of visit, the length of stay across all purpose recorded 6 nights.

Table 2.9: Length of Stay by Purpose of Visit and Top 15 Source markets, Zanzibar

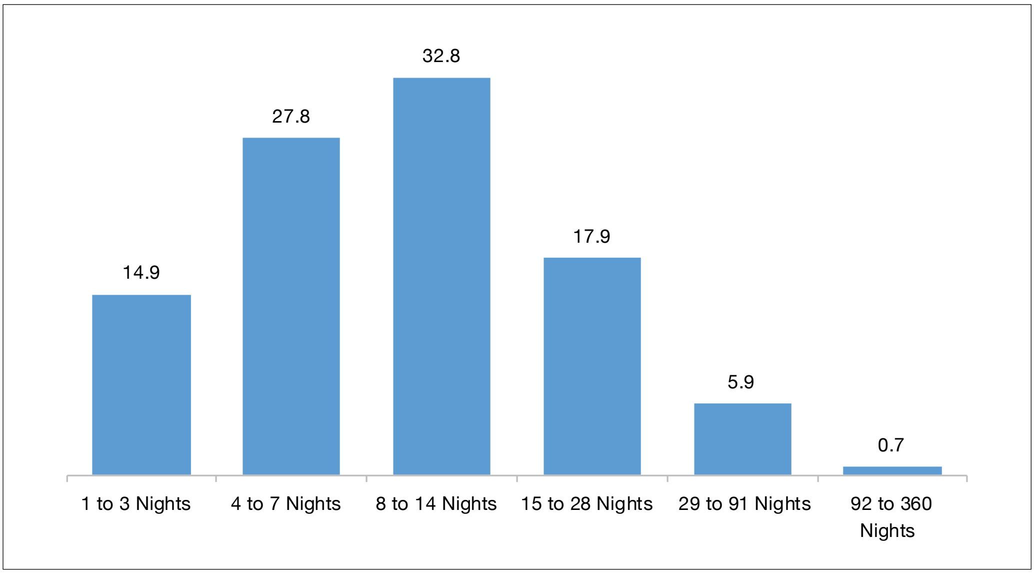
Country of Residence	Business	Leisure and Holidays	Visiting Friends and Relatives	Other	Average
Italy	19	8	6	8	**9**
United Kingdom	6	6	5	7	**6**
United States of America	5	4	4	6	**5**
France	2	6	8	5	**5**
Germany	2	9	8	5	**6**
Netherlands		6	10	5	**7**
Spain		6	5	8	**6**
South Africa	5	6	7	4	**5**
Switzerland	11	7	5	4	**7**
Canada	1	6	5	7	**5**
Kenya	3	4	4	3	**4**
Belgium		6	7	5	**6**
United Arab Emirates		5	3	4	**4**
Australia	1	5	7	5	**5**
China	14	3	7	8	**7**
Average	**6**	**6**	**6**	**6**	**6**

2.11 Night Spent

Visitors spent different number of nights in the country depending on the purpose of the travel and country of origin. The survey's findings show that about 15 percent of visitors to the United Republic of Tanzania spent between '1 to 3' nights (**Chart 2.17**). Also visitors who spent '4 to 7' nights accounted for about 28 percent of all visitors, while 33 percent of visitors stayed between '8 to 14' nights. Generally, about three quarter of all visitors spent about two weeks. Proportion of visitors who spent more than 28 nights was less than seven percent.

Chart 2.17: Percentage Distribution of Visitors by Nights spent

Percent

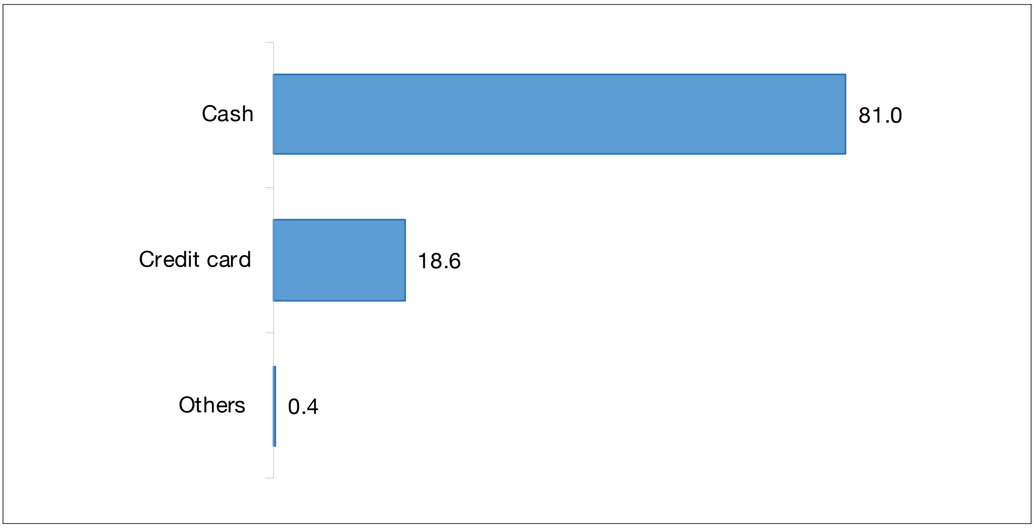


2.12 Mode of Payment

Survey findings indicate that 81.0 percent of visitors to Tanzania settled their bills in cash compared to 86.9 percent recorded in 2014 representing a decline of 6.8 percent (**Chart 2.18**). The number of visitors who settled their bills through credit cards improved to 18.6 percent from 12.8 percent in 2014 while the use of travelers' cheque was 0.1 percent. In Zanzibar 75.5 percent of visitors settled their bill in cash while 24.1 percent used credit cards. Unacceptability of credit cards at most of the tourism establishments continues to be a problem to visitors since the use of credit cards as a mode of payment continues to be low. It is worth noting that this has been an issue of concern to visitors even in the previous surveys. In view of these finding there is a need for banks to sensitize owners of tourism establishments and other relevant stakeholders on the importance and benefit of allowing visitors to make use of credit cards to settle their bills. One of the benefits of allowing visitors to settle their bills using credit cards is the possibility of them staying longer.

Chart 2.18: Mode of Payment

Percent



2.13 Mode of Payments by Activity

Table 2.10 shows that out of 6,787 visitors who settled their bills in cash 46.1 percent made payments in beaches and wildlife tourism activities, while out of 1,560 visitors who used credit cards to settle their bills 68.1 percent made payments for beaches, conferences and wildlife tourism activities.

Table 2.10: Mode of Payments by Activity

Percent

	Mode of Payments			
	Cash	**Credit card**	**Other**	**Grand total**
Wildlife	77.1	22.4	0.5	100.0
Beach	75.1	24.5	0.3	100.0
Cultural	84.8	14.8	0.5	100.0
Mountain climbing	82.7	17.3	0.0	100.0
Business	96.3	3.4	0.1	100.0
Shopping	94.5	5.5	0.0	100.0
Conference	69.9	29.4	0.7	100.0
Diving and sports fishing	83.0	15.9	1.1	100.0
Bird watching	76.5	23.5	0.0	100.0
hunting	82.4	17.6	0.0	100.0
Other	84.5	15.5	0.0	100.0

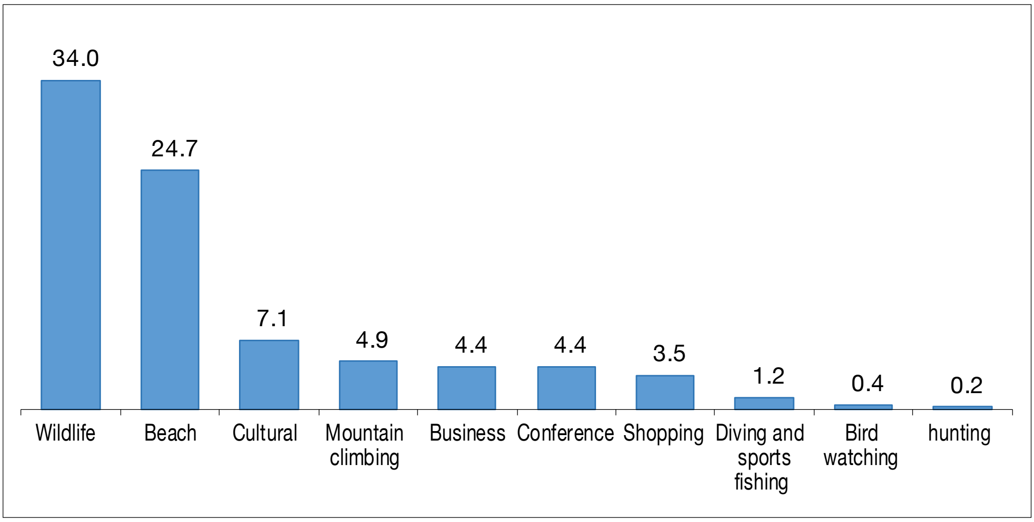
Other modes include, travelers cheque, Banker Cheque, Transfers

2.14 Tourism Activities

During the 2015 survey, majority of visitors went to visit the national parks in the northern and southern circuits, followed by those visiting the country's exquisite beaches mostly in Zanzibar Island. Majority of other visitors were interested with the country's cultural heritage and historical sites. Given that Tanzania is strategically located a good number of visitors from neighboring came to utilize the services Dar es Salaam port. Other activities which attracted visitors include conference tourism, shopping, bird watching and hunting. The findings indicate that 34.0 percent of visitors came for game viewing to see the country's unique wildlife ranging from lion, hippopotamus, giraffe, zebra and rhinos (**Chart 2.19**). Majority of visitors who came to visit wildlife were from the United States of America, the United Kingdom, France and Netherlands.

Chart 2.19: Tourism Activities in Tanzania

Percent



Elephants

Leopard

Lions

Hipoppotamus

Wonderful wildlife in Tanzania

The second most attractive activity is beach tourism, whereby of all the surveyed visitors, 24.7 percent came to enjoy the country's wonderful sandy beaches. Visitors from Italy, Germany, the United Kingdom, Kenya and the United States of America took the lead in beaches activities.

Visitors came for white sandy beaches

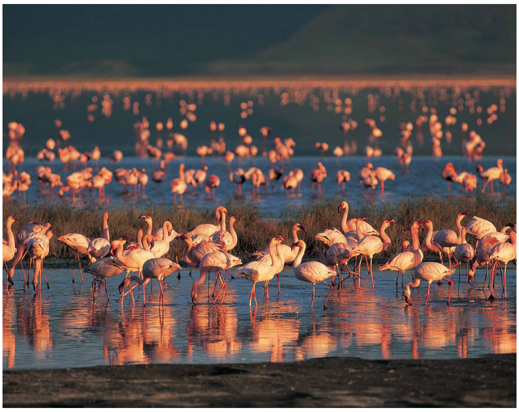
The third activity was cultural tourism, accounting for 7.1% of the surveyed visitors. This is explained by the country's richest history and cultural heritage found in sites like Bagamoyo ruins, kilwa kivinje, Zanzibar's stone town. Visitors the United States of America, the United Kingdom and Kenya from were mostly interested with this activity.

Cultural and historical sites

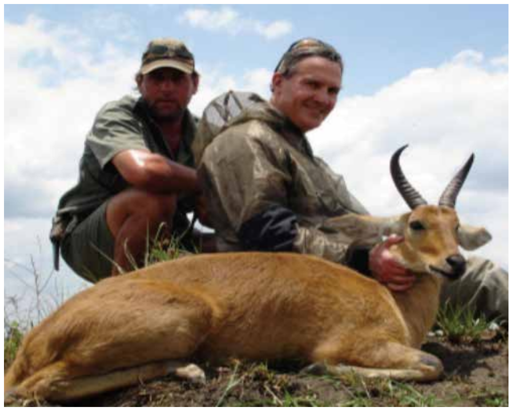
Mountain climbing used to be the third most attractive activity, however this year it has been surpassed by the cultural tourism. Majority of visitors who came for mountain climbing were from the United States of America, the United Kingdom and Canada.

Mount Kilimanjaro

Other activities were bird watching with majority of visitors coming from the France, Germany and Spain. Meanwhile, visitors who came to consume the services of Dar Port were mostly from Zimbabwe (55.1 percent) and Zambia (29.5 percent) of all visitors who came for vehicle clearance. This is largely due to the fact that these countries are landlocked. Likewise, visitors from neighboring countries come to shop at the famous Kariakoo Market; these visitors include Kenyans, Zimbabweans' and Zambians.



Bird Watching



Hunting Safaris

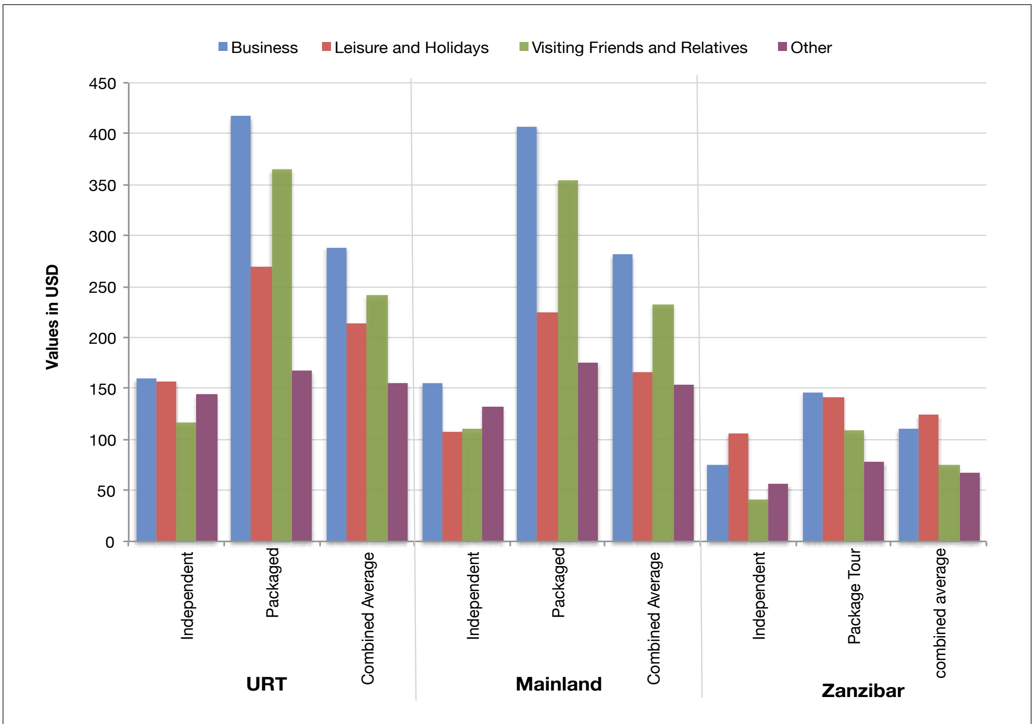
Shopping at Kariakoo

2.15 Average Expenditure

The overall average expenditure per person per night of visitors to the United Republic of Tanzania is USD 199 compared to USD 221.0 recorded in 2014. Visitors who came under the package tour arrangement spent on average USD 305 while those who came non-package spent an average of USD 141 per person per night.

Under the Package tour arrangement, international visitors who came for business spent the most depicting an average of USD 466 per person per night followed by holiday markers whose average expenditure per person per night is USD 285. Those who came under the non-package tour arrangement indicates that business visitors spent on average USD 157 per person per night and holiday visitors spent an average of USD 148. The results further show that in mainland Tanzania visitors who came under the package tour arrangement spent an average of USD 310 per person per night, compared with an average of USD 247 spent by visitors under the same tour arrangement in Zanzibar (**Chart 2.20**).

Chart 2.20: Average Expenditure per Person per Night by Purpose of Visit, 2015



Looking at average expenditure by source markets, the findings indicate that visitors from Switzerland, the United Arab Emirates, France, Zambia, United States of America, and Germany who came under the package tour arrangement spent the most with an average of more than USD 300. Visitors from Zimbabwe, Germany, Netherlands, Kenya and Zambia who come under the non-package tour arrangement spent least with an average below USD 100 per person per night (**Table 2.11**).

Table 2.11: Average expenditure of Main Source Market, URT

Value in USD

Country of Residence	Travel Arrangement		Overall	Visitors
	Non-package	Package		
United States Of America	130	346	238	1425
United Kingdom	122	290	206	1292
Kenya	89	199	144	918
Germany	72	306	189	801
France	126	367	229	797
Italy	99	248	163	760
Netherlands	86	254	170	586
South Africa	157	273	207	535
Zimbabwe	63	191	105	497
Spain	103	182	137	446
Zambia	90	353	203	372
Canada	162	208	185	345
Switzerland	133	538	307	262
United Arab Emirates	147	370	221	238
Belgium	109	224	147	237

The main source market in Mainland Tanzania indicates that visitors from Zambia, France, the United States of America, China, Germany and Netherlands who came under the package tour arrangement on average spent more than USD 300 per person per night while visitors from Zimbabwe, Germany, Kenya, Netherlands, Italy and Zambia who came under the non-package tour arrangement on average spent less than USD 100 per person per night (**Table 2.12**).

Table 2.12: Average expenditure of Main Source Market, Mainland

Value in USD

Country of Residence	Travel Arrangement		Overall	Visitors
	Non-package	Package		
United States Of America	128	350	239	1322
United Kingdom	124	257	190	1136
Kenya	82	184	133	836
France	126	351	222	718
Germany	71	306	189	685
Netherlands	86	303	195	549
Zimbabwe	64	115	81	486
Spain	101	199	143	359
Zambia	97	421	205	353
Canada	163	206	184	327
Italy	94	235	141	291
South Africa	159	283	212	290
Switzerland	134	189	152	224
Belgium	109	221	146	212
China	152	320	236	202

The main source market in Zanzibar depicts that under the package tour arrangement Czech Republic, France, the United Kingdom, Netherlands, the United Arab Emirates spent on average more than USD 300 per person per night. Under the non-package tour arrangement only visitors from Czech Republic spent on average less than USD 100 per person per night (**Table 2.13**).

Table 2.13: Average Expenditure of Main Source Market, Zanzibar

Value in USD

Country of Residence	Travel Arrangement		Overall	Visitors
	Non-package	Package		
United Kingdom	100	400	228	646
France	109	462	227	616
United States Of America	150	284	217	570
Netherlands	281	382	179	471
South Africa	150	239	188	288
Kenya	204	40	171	159
United Arab Emirates	107	336	221	147
Australia	310	78	184	122
Austria	192	66	181	98
China	358	66	185	97
Israel	226	167	197	66
Portugal	111	291	171	34
Czech Republic	60	683	267	27
Luxembourg	244	161	203	25
Uganda	259	185	241	24

2.16 Proportion of Expenditure by Products

International visitors to the United Republic of Tanzania indicate different spending behaviors. Out of the total expenditure of an international visitor in 2015, 46 percent was spent on accommodation, 15 percent on food and drinks, 13 percent on transport services. Only one percent was spent on cultural services. In Tanzania mainland, the findings indicate that out of the total expenditure of international visitors, 50 percent was spent on accommodation, 20 percent on food and drinks and 10 percent on transportation services. In case of Zanzibar, international visitors spend 33 on accommodation, 19 percent on souvenir, 13 percent on food and drinks and 8 percent on transportation (**Table 2.14**). Rising number of visitors and increased spending is bound to influence employment within the tourism industry. The integrated labor force survey of 2014 shows that number of persons employed directly or indirectly in Tanzania Mainland in the tourism industry stood at 1,195,233 in 2014.

Table 2.14: Proportion of Expenditure by Products, 2015,

Percent

Products	Mainland	Zanzibar	URT
Accommodation services	50	33	46
Food and drinks services	20	13	15
Transportation services	10	8	13
Cultural services	1	2	1
Hunting, sports and recreational services	1	6	2
Sightseeing and excursion services	3	8	6
Mountain climbing services	3	NA	4
Visa, taxes and fees	2	5	3
Souvenirs	4	19	4
Tips and donations	3	4	3
Other	3	3	4
Total	**100**	**100**	**100**

Table 2.15 shows that out of total expenditure spent by international visitors who came under the package arrangement 47 percent was spent on accommodation, 19 percent on food and drinks and 9 percent on Transportation. On the other hand, those who used the non-package tour arrangement spent 49 percent on accommodation, 23 percent on food and drinks, 10 percent on souvenirs only five percent on transportation.

Table 2.15: Expenditure of Visitors by Products and Travel Arrangement (URT), 2015

Percent

Product	Travel Arrangement	
	Non-package	Package
Accommodation services	49	47
Food and drinks services	23	19
Transportation services	5	9
Cultural services	1	1
Hunting, sports and recreational services	2	2
Sightseeing and excursion services	3	4
Mountain climbing services	1	3
Visa, taxes and fees	2	2
Souvenirs	10	7
Tips and donations	3	3
Other	1	3
Total	**100**	**100**

2.17 Tourism Earnings

Tourism earnings in Tanzania declined by 5.2 percent to USD 1,902.0 million in 2015 from 2,006.3 recorded in 2014 largely attributed to slight fall in the number of international tourist arrivals and average expenditure per person (**Chart 2.21**). The number of international tourist arrivals to Tanzania declined by 0.3 percent to 1,137,182 in 2015 from 1,140,156 registered in 2014. Much of the fall in tourist arrivals were recorded in major top source markets particularly in the United States of America, France, Netherlands, Canada, Switzerland and Australia (**Table 2.16**). In the case of Zanzibar, the earnings increased to USD 293.5 million from USD 269.3 million recorded in 2014 resulting from the increase in the number of arrivals from 198,539 in 2014 to 202,209 in 2015.

Chart 2.21: Tourism Earnings and International Tourist Arrivals to Tanzania

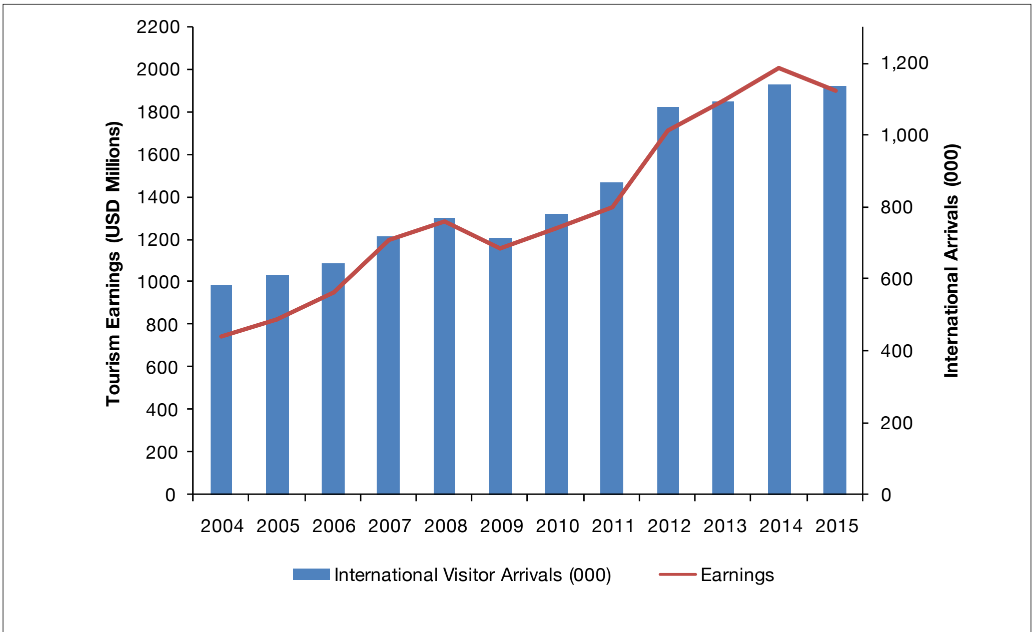


Table 2.16: Tourism Earning and Tourist Arrivals in the Top 15 Source Markets

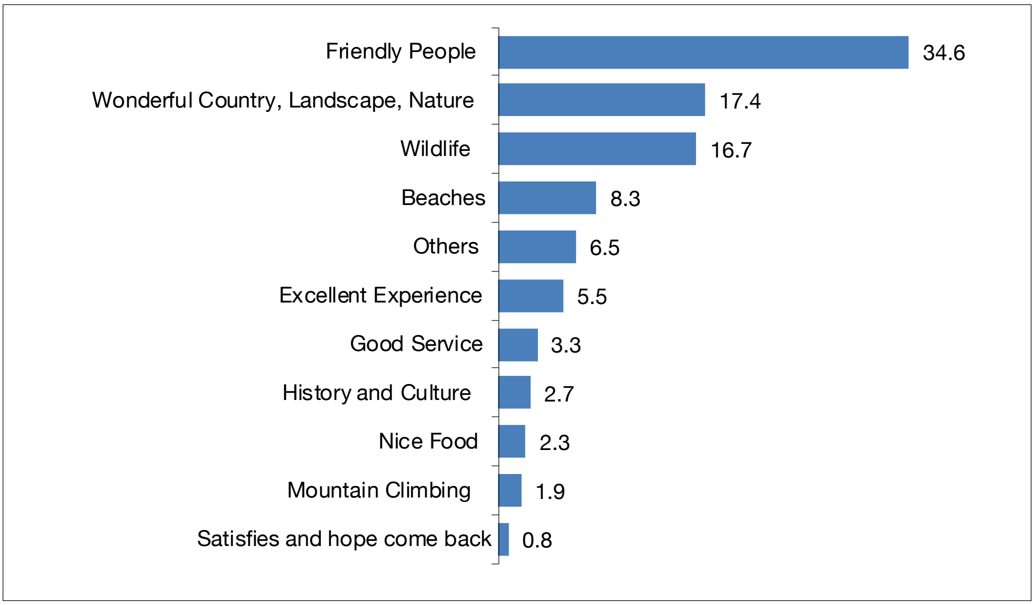
Country of Residence	International Tourist Arrivals		% Change	Tourism Earnings (Millions of USD)		% Change
	2014	2015		2014	2015	
United States of America	80,484	66,394	-17.5	257.42	217.09	-15.7
United Kingdom	60,034	54,870	-8.6	147.51	167.48	13.5
Kenya	188,214	197,562	5.0	105.11	95.43	-9.2
Italy	49,518	53,742	8.5	92.63	101.25	9.3
Germany	47,262	52,236	10.5	128.67	72.83	-43.4
France	33,585	28,683	-14.6	97.91	64.3	-34.3
Netherlands	23,710	20,150	-15.0	65.26	52.03	-20.3
Zimbabwe	36,497	30,533	-16.3	22.89	12.03	-47.4
South Africa	26,614	30,292	13.8	54.1	48.04	-11.2
Spain	8,757	11,984	36.9	21.63	22.77	5.3
Zambia	36,679	32,694	-10.9	48.25	42.96	-11.0
Canada	21,185	16,843	-20.5	76.27	39.41	-48.3
Switzerland	14,900	13,691	-8.1	92.31	41.6	-54.9
Australia	16,527	15,760	-4.6	50.91	33.46	-34.3
China	21,246	25,444	19.8	43.83	54.8	25.0

2.18 Visitors' Perception about Tanzania

Chart 2.22 shows that of all visitors who visited Tanzania 68.7 percent were impressed by the friendliness of the people, wonderful country and wildlife. Tourists were also impressed by the beautiful beaches and a memorable experience. Visitors who were impressed by beaches accounted for 8.0 percent which is very low compared with the number and beauty of beaches in Tanzania mainland and Zanzibar. In Zanzibar 13.1 percent of visitors were impressed by beaches while 30.7 percent were impressed by friendliness of people. These findings call for the Ministry of Natural Resources and Tourism and all other stakeholders to aggressively market all attractive places which are unique to Tanzania and currently not attracting large number of visitors, such as mountain climbing which attracted only 2.9 percent of visitors.

Chart 2.22: What Impressed Visitors

Percent



2.19 Areas that Need Improvement

About 21.1 percent of the visitors were concerned with the state of roads, particularly within the national parks. Inadequate facilities and inland transport particularly public transport was among the main concerns of visitors. Improvement of facilities such as toilets, availability of water and electricity in public toilets along the roads and national parks was also pointed out. Meanwhile, 10.4 percent of surveyed visitors complained about traffic jams particularly in Dar es Salaam (**Chart 2.23**). This has been a major concern even in the previous surveys. Visitors also complained about too many tips which are also demanded impolitely. Other concerns were unreliability of internet access, credit cards unacceptability at some tourism establishments and slow processing of visa at entry points.

Chart 2.23: Areas that need Improvement

Chapter 3: Conclusion and Policy Recommendations

3.1 Conclusion

The survey findings reveal that tourism earnings declined by 5.2 percent to USD 1,902.0 million in 2015 from USD 2,006.3 million recorded in 2014 largely attributed to fall in the number of international tourist arrivals and average expenditure per person. The number of international tourist arrivals went down slightly by 0.3 percent to 1,137,182 in 2015. The overall average expenditure per person per night of a visitor was USD 199 in 2015 lower than USD 210 recorded in 2014.

3.2 Policy Recommendations

a) The findings indicated that unacceptability of credit cards at most of the tourism establishments continues to be a problem to the majority of the visitors as the use of credit cards continues to be low. In view of this there is a need for banks to sensitize owners of tourism establishments and other relevant stakeholders on the importance and benefit of allowing visitors to make use of credit cards when settling their bills.

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

b) The survey's results indicate that the overall average length of stay of visitors to the United Republic of Tanzania was 10 nights same as it was in the past five years. This implies that there is a need of enhancing diversification of tourism products in order to increase the number of nights spent at a destination by tourists. This will have a positive impact on tourist expenditure in the country.

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

c) The findings indicated that wildlife was the activity which visited most by majority of visitors in 2015, apart from other tourist attractions such as sandy beaches, historical sites, mountains, nature and landscapes. This implies that there is a need of putting more efforts in promoting other forms of tourist attractions so as to complement wildlife tourism.

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

d) The findings also indicate many visitors complained about cleanliness of the environment particularly toilets and inadequate water supply in the cities and towns, unsatisfactory state of air conditioners at airports and poor states of roads within the national parks. The government is therefore urged to continue with its efforts to improve roads in the national parks and other facilities.

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

e) Traffic jam in Dar es Salaam region continued to be the major concern of most tourists. The government is advised to continue with its efforts to address the infrastructural issues.

Responsible Institutions: MoW, MoT and DCC

Appendices

Appendix A: Survey Methodology

I. Introduction

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

II. Objective of the Survey

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

III. Scope of the Survey

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

IV. Sample Size

The survey was done on sample basis. It was planned to interview 10,959 departing international visitors, equivalent to one percent of the international visitors recorded in 2013. Ultimately, the survey managed to randomly interview about 7,491 respondents, who represented around 14,996 visitors in the sample. This sample was considered sufficient to meet the survey's objectives.

V. Fieldwork

The data collection exercise was undertaken for a period of two weeks between August and September 2015. Eight teams; seven in Mainland and one in Zanzibar collected the data. Technical Committee members participated in the field supervision of the interviews to ensure questionnaires completeness, quality and consistency.

VI. Survey's Coverage

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

VII. Numerators' Manual

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

VIII. Training of Enumerators

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

IX. The Questionnaire

The questionnaire was designed to ensure that the questions asked were in line with user's data needs. The information collected is useful for tourism promotion and macroeconomic policy formulation. A single questionnaire was used to gather information for the 2014 International Visitors` Exit Survey. The content of the questionnaire was based on the previous years' questionnaires, with slight modifications. The questionnaire used in the survey had 24 questions and it comprised four main parts, namely: visitor profiles, travel behavior, expenditure patterns and visitor's comments (Appendix III).

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

Questions 11 to 17 aimed at obtaining information about type of tour arrangement (package/non-package), items in the package, costs of package tour and number of nights spent.

Questions 18 to 20 were structured to establish tourists' earnings ascribed to Tanzania. In addition, the questions probed for details on the amount of money spent in Tanzania.

Question 21 and 22 asked the visitors most used mode of payment while in Tanzania and whether they were visiting Tanzania for the First-time or not.

Question 23 and 24 sought information about areas that impressed the visitors and those which need improvement.

X. Data Processing

The processing of the 2015 International Visitors' Exit Survey data began 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.

XI. Tourist Expenditure Estimation

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

$$\mathbf{E_V = (E_P X\ V_P XT) + (E_{NP} X V_{NP} XT)}$$

Whereby:

E_V = Total tourist expenditure in Tanzania

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

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

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

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

T = Average length of stay, derived from the survey

The Simplified Model

Country of Residence	Purpose of Visit	Total number of International Tourist Arrivals (sourced from Immigration Dept)	Number of International Tourist Arrivals by Travel arrangement		Average length of Stay	Average Expenditure per Visitor per Night		Total Expenditure
						Package	Non Package	
			Package (V_P)	Non-package (V_{NP})	(T)	(E_P)	(E_{NP})	(E_V)
	Business							
	Holiday							
	VFR							
	Other							

Procedure and assumptions used for the estimation of tourist expenditure for 2015:

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

- It was assumed that 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 the number of international tourist arrivals by purpose of visit were distributed according to the package and non-package arrangements using the travel arrangement ratios as established in the survey.

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

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

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

Appendix B: Questionnaire

THE 2015 INTERNATIONAL VISITORS' EXIT SURVEY

Please read the instructions carefully before filling the form.

INTRODUCTION

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

Your Cooperation is highly appreciated

***FOR OFFICIAL USE*:**

CODE NUMBER: ______________________________

NAME OF THE RESEARCHER: ______________________________

*DATE:*________________ *SIGNATURE:* ________________

NAME OF THE DATA ENTRANT: ______________________________

1. Nationality____________________ Country of Residence ________________

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

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

3. Are you travelling alone? (Tick) Yes [ ] No [ ] *If Yes go to question no. 7*

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

With spouse	[ ]
With children	[ ]
With spouse and children	[ ]
With other friends and relatives	[ ]

5. What is the number of persons whom you travelling with whose expenses you are paying?

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

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

7. Gender (including yourself)

Number of Females	
Number of Males	

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

Meetings and Conference	[ ]	Scientific and Academic	[ ]
Business	[ ]	Volunteering	[ ]
Visiting Friends and Relatives	[ ]	Day visitors (excursionists)	[ ]
Leisure and Holidays	[ ]	Other (please specify)	[ ]

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

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

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

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

11. Did you travel independently or booked a package tour?

(If you travelled non-package, go to question 17)

Independently	Package

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

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

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

14. Total cost of the package tour Currency [ ]

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

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

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

Zanzibar Island [ ]

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

Currency [ ]

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

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

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

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

Cash [ ] Traveller's Cheques [ ]

Credit Card [ ] Other (please specify) [ ]

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

23. What impressed you most during your trip to Tanzania?

....

....

....

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

....

....

....

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

Appendix C: Statistical Tables

Table C I: Length of stay by Purpose and Top 15 Source markets to Tanzania, Mainland, 2015

Top 15 Source Markets	Business	Leisure and Holidays	Visiting Friends and Relatives	Other	Average
United States of America	8	9	13	9	10
United Kingdom	7	12	16	12	11
Kenya	4	5	5	8	6
France	6	9	6	12	8
Germany	7	8	16	14	11
Netherlands	7	11	21	17	14
Zimbabwe	4	3	6	5	4
Zambia	4	5	4	5	5
Canada	11	10	12	14	12
Spain	4	8	17	16	12
Italy	9	9	12	10	10
South Africa	5	6	3	6	5
Switzerland	4	10	16	11	9
China	6	8	9	7	7
Australia	5	8		12	9
Average	6	8	12	11	9

Table C II: International Tourist Arrivals

Country	Total	% of Total
Kenya	197,562	17.37
United States of America	66,394	5.84
United Kingdom	54,599	4.80
Italy	53,742	4.73
Germany	52,236	4.59
Burundi	48,210	4.24
Rwanda	45,216	3.98
Uganda	37,253	3.28
Zambia	32,694	2.88
India	32,608	2.87
Zimbabwe	30,533	2.68
South Africa	30,288	2.66
France	28,683	2.52
Mozambique	27,323	2.40
China	25,444	2.24
Netherlands	20,150	1.77
Canada	16,843	1.48
Malawi	15,860	1.39
Australia	15,760	1.39
Israel	14,754	1.30
Switzerland	13,691	1.20
Sweden	13,189	1.16
Congo	13,101	1.15
Oman	12,872	1.13
Spain	11,984	1.05
Belgium	11,287	0.99
Denmark	10,972	0.96
Norway	10,766	0.95
Poland	9,192	0.81
South Sudan	8,540	0.75
Comoros	7,557	0.66
Austria	6,720	0.59
Turkey	6,112	0.54
Nigeria	5,874	0.52

Country	Total	% of Total
Ireland	5,698	0.50
Finland	5,498	0.48
Brunei Darussalam	5,491	0.48
Russian Federation	5,001	0.44
Democratic People's Republic of Korea	4,592	0.40
Czech Republic	4,563	0.40
Japan	4,463	0.39
Pakistan	4,257	0.37
Ghana	4,135	0.36
Egypt	4,079	0.36
United Arab Emirates	3,525	0.31
New Zealand	3,423	0.30
Uzbekistan	3,278	0.29
Portugal	3,027	0.27
Philippines	2,633	0.23
Romania	2,566	0.23
Ukraine	2,542	0.22
Mexico	2,216	0.19
Swaziland	2,171	0.19
Brazil	2,124	0.19
Cocos (Keeling) Islands	2,093	0.18
Cabo Verde	2,020	0.18
Hungary	1,988	0.17
Ecuador	1,961	0.17
Ethiopia	1,935	0.17
Malaysia	1,862	0.16
Botswana	1,827	0.16
Serbia	1,794	0.16
Côte D' ivoire	1,637	0.14
Yemen	1,628	0.14
Namibia	1,544	0.14
Gabon	1,532	0.13
Cameroon	1,481	0.13
Greece	1,470	0.13
Indonesia	1,447	0.13

Country	Total	% of Total
Somalia	1,202	0.11
Nepal	1,171	0.10
Sudan	1,132	0.10
Thailand	1,128	0.10
Estonia	1,118	0.10
Qatar	1,113	0.10
Georgia	1,095	0.10
Saudi Arabia	1,089	0.10
Bulgaria	1,073	0.09
Syrian Arab Republic	1,060	0.09
Seychelles	1,048	0.09
Argentina	1,027	0.09
Iran	1,007	0.09
Djibouti	986	0.09
China, Hong Kong Special Administrative Region	985	0.09
Singapore	971	0.09
Sri Lanka	960	0.08
Slovakia	866	0.08
Dominica	838	0.07
Croatia	804	0.07
Cambodia	796	0.07
Algeria	793	0.07
Bangladesh	763	0.07
Martinique	716	0.06
Costa Rica	699	0.06
Bosnia and Herzegovina	687	0.06
Jersey	685	0.06
Iceland	663	0.06
Angola	661	0.06
Lesotho	649	0.06
Taiwan, Province of China	644	0.06
Mauritius	632	0.06
Chile	624	0.05
Lithuania	624	0.05
Luxembourg	596	0.05

Country	Total	% of Total
Tunisia	581	0.05
Gambia	574	0.05
Colombia	555	0.05
Lebanon	544	0.05
Jordan	537	0.05
Iraq	524	0.05
Kuwait	520	0.05
Slovenia	497	0.04
Cyprus	490	0.04
Bolivia (Plurinational State of)	488	0.04
Honduras	461	0.04
Viet Nam	424	0.04
Uruguay	419	0.04
Guinea	391	0.03
Chad	363	0.03
Solomon Islands	359	0.03
Burkina Faso	348	0.03
Fiji	340	0.03
Heard Island and Mc Donald Islands	332	0.03
Venezuela (Bolivarian Republic Of)	301	0.03
Peru	293	0.03
Cuba	291	0.03
Jamaica	282	0.02
Malta	268	0.02
Trinidad and Tobago	267	0.02
Morocco	257	0.02
Equatorial Guinea	245	0.02
Isle of Man	238	0.02
Kazakhstan	236	0.02
Sierra Leone	233	0.02
Senegal	232	0.02
Benin	226	0.02
Libya	211	0.02
Togo	208	0.02
Madagascar	198	0.02

Country	Total	% of Total
Nicaragua	186	0.02
Mauritania	185	0.02
Eritrea	183	0.02
Mali	182	0.02
Albania	179	0.02
Latvia	178	0.02
Paraguay	175	0.02
Armenia	157	0.01
Belarus	148	0.01
Sao Tome and Principe	146	0.01
Bahrain	145	0.01
Niger	143	0.01
El Salvador	142	0.01
Suriname	138	0.01
Azerbaijan	133	0.01
Liberia	132	0.01
Afghanistan	126	0.01
Tajikistan	120	0.01
State Of Palestine	114	0.01
Andorra	107	0.01
The Former Yugoslav Republic of Macedonia	96	0.01
San Marino	79	0.01
Myanmar	72	0.01
Republic of Moldova	72	0.01
Panama	68	0.01
Haiti	62	0.01
Saint Vincent and The Grenadines	59	0.01
Guatemala	58	0.01
Saint Kitts And Nevis	58	0.01
Antigua And Barbuda	50	0.00
Liechtenstein	38	0.00
Mongolia	34	0.00
Central African Republic	31	0.00
Grenada	28	0.00
Belize	26	0.00

Country	Total	% of Total
Guyana	23	0.00
Barbados	21	0.00
Guinea-Bissau	21	0.00
Micronesia (Federated States of)	21	0.00
Bermuda	20	0.00
Saint Lucia	16	0.00
Bahamas	15	0.00
China, Macao Special Administrative Region	12	0.00
Stateless	12	0.00
Bhutan	9	0.00
Kyrgyzstan	8	0.00
Papua New Guinea	5	0.00
Saint Pierre and Miquelon	1	0.00
Total	1,137,182	100

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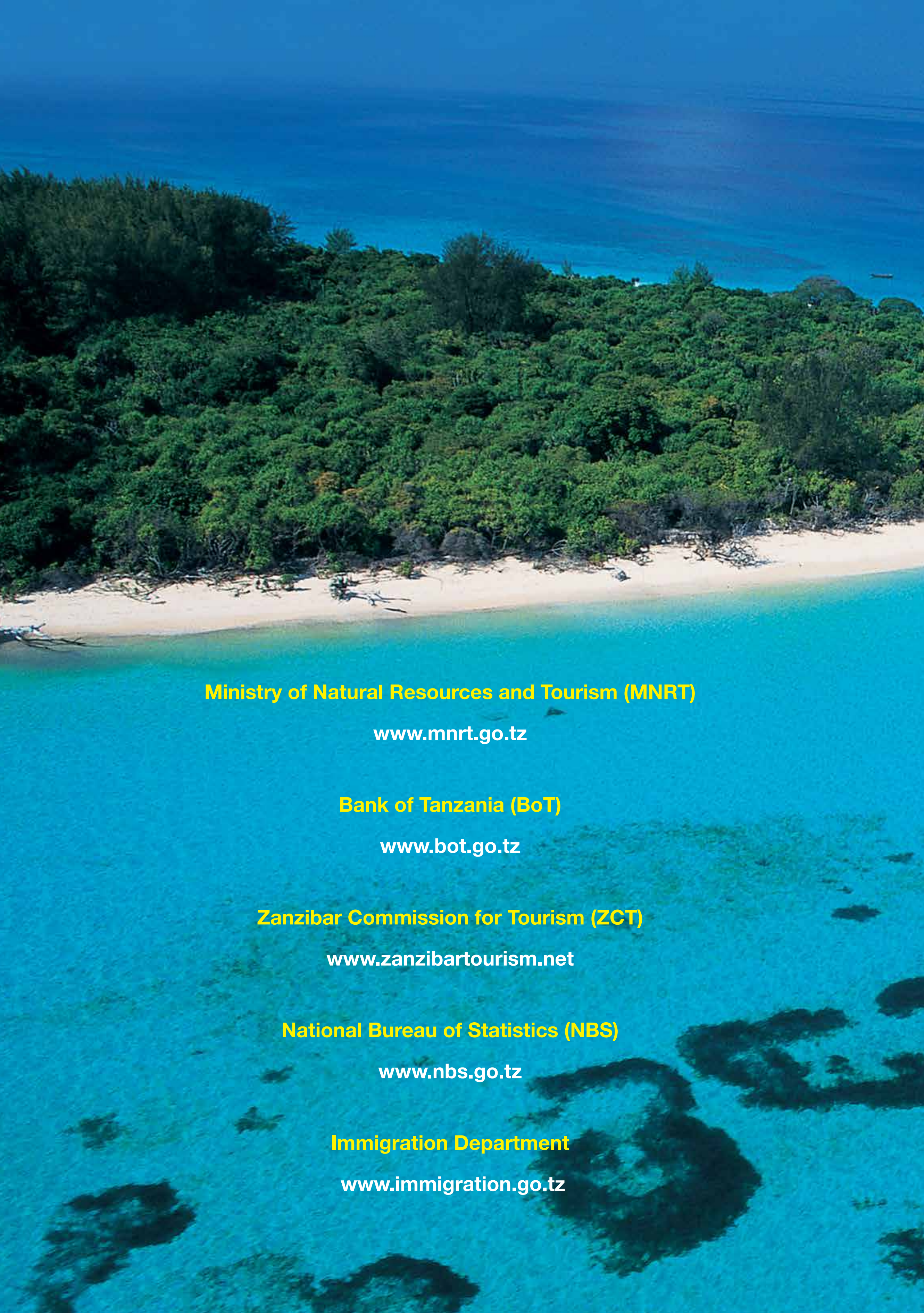

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