

## Chapter 2

# PRESENTATION OF RESULTS

### PRESENTATION OF THE SURVEY RESULTS

This chapter presents consolidated key results as compiled from the questionnaires that were administered during the three seasons surveys (low, peak and mini-peak), in which the total number of interviewees was 18,903. Overall, the interviewees responded on behalf of 39,016 visitors.

#### Country of Residence

Table 2.1(a) shows that out of the 39,016 visitors from 113 countries that were documented during the three surveys, the United Kingdom recorded the highest number of arrivals. The United State of America followed at 14.6 percent, then Italy 11.8 percent, France 6.4 percent and South Africa 5.6 percent. Table 2.1 (a) shows the top 15 source markets, which constitute, 85.7 percent of all the visitors.

**Table 2.1(a): Top 15 Source Markets to the United Republic of Tanzania**

S/N	Country of Residence	Number of Visitors	% of Total
1.	United Kingdom	7,252	18.6%
2.	United States of America	5,697	14.6%
3.	Italy	4,593	11.8%
4.	France	2,490	6.4%
5.	South Africa	2,170	5.6%
6.	Spain	2,035	5.2%
7.	Germany	1,869	4.8%
8.	Netherlands	1,437	3.7%
9.	Kenya <sup>2</sup>	1,100	2.8%
10.	Australia	1,037	2.7%
11.	Belgium	847	2.2%
12.	Switzerland	815	2.1%
13.	Sweden	808	2.1%
14.	Canada	802	2.1%
15.	Norway	492	1.3%
16.	Others	5,572	14.3%
	<b>TOTAL</b>	<b>39,016</b>	<b>100.0%</b>

<sup>2</sup> Kenya as a source market is composed of 55% Kenyans by nationality and the remaining 45% are non-nationals.

Examining Tanzania Mainland separately, the top 15 source markets dominated the market and therefore accounting for 85.8 percent of all the visitors as seen in Table 2.1(b). The United Kingdom led by 20.2 percent, followed by the United States of America 16.5 percent, France 6.8 percent, Italy 6.7 percent, etc. A total of 29,673 residents from 107 countries visited Tanzania Mainland in the period under review.

**Table 2.1(b): Top 15 Source Markets to Tanzania Mainland**

S/N	Country of Residence	Number of Visitors	% of Total
1.	United Kingdom	5,991	20.2
2.	United States of America	4,891	16.5
3.	France	2,011	6.8
4.	Italy	1,991	6.7
5.	Germany	1,693	5.7
6.	Spain	1,558	5.3
7.	South Africa	1,419	4.8
8.	Netherlands	1,260	4.2
9.	Australia	921	3.1
10.	Kenya	701	2.4
11.	Canada	662	2.2
12.	Sweden	661	2.2
13.	Switzerland	656	2.2
14.	Belgium	633	2.1
15.	Norway	407	1.4
16.	Others	4,218	14.2
	<b>TOTAL</b>	<b>29,673</b>	<b>100.0</b>

On the other hand, 17,547 visitors, who were residents of 91 countries, visited Zanzibar. The top 15 countries dominated the market by 88.6 percent. Similarly, the United Kingdom led by 21.7 percent, followed by Italy with a 20.6 percent

share. The United States of America ranked third, representing 7.1 percent of all the visitors, as indicated in Table 2.1(c).

**Table 2.1(c): Top 15 Source Markets to Zanzibar**

<b>S/N</b>	<b>Country of Residence</b>	<b>Number of Visitors</b>	<b>% of Total</b>
1.	United Kingdom	3,800	21.7
2.	Italy	3,607	20.6
3.	United States of America	1,250	7.1
4.	Spain	1,078	6.1
5.	France	971	5.5
6.	South Africa	843	4.8
7.	Germany	771	4.4
8.	Netherlands	671	3.8
9.	Australia	508	2.9
10.	Sweden	452	2.6
11.	Belgium	402	2.3
12.	Canada	344	2.0
13.	Switzerland	307	1.7
14.	Israel	290	1.7
15.	Norway	259	1.5
16.	Others	1,994	11.4
	<b>TOTAL</b>	<b>17,547</b>	<b>100.0</b>

Table 2.1(d) shows that 12,042 out of 39,016 visitors, i.e. 30.9 percent visited Mainland together with Zanzibar, with the United Kingdom representing 25.3 percent, the United States of America 9.5 percent, Italy 8.7 percent, etc. The top 15 source markets accounted for 87.9 percent of all the visitors who visited the Mainland together with Zanzibar.

Table 2.1(d): Top 15 Source Markets to Tanzania Mainland Together with Zanzibar

### Age Group

Table 2.2 shows that the majority of visitors (47.4 percent) belonged to the '18 - 35' age group, followed by the '36-55' age group that accounted for 38.6 percent of all the visitors covered in the survey. The two age groups (the economically active), when combined represented 86.0 percent of the total. The survey results also showed that the least number of visitors (1.4 percent) were below 18 years of age.

Table 2.2: Number of Interviewees By Age Group

Age Group	Number of Interviewees	% of Total
Below 18 years	262	1.4%
18 – 35 years	8,954	47.4%
36 – 55 years	7,295	38.6%
Above 55 years	2,392	12.7%
<b>TOTAL</b>	<b>18,903</b>	<b>100.0%</b>

S/N	
1.	U
2.	U
3.	I
4.	F
5.	S
6.	C
7.	N
8.	A
9.	S
10.	B
11.	S
12.	C
13.	S
14.	N
15.	D
16.	C
	<b>T</b>

### Travel Party

Table 2.3 shows that most visitors (36.6 percent) travelled with other friends and relatives, followed by those who travelled with spouse, accounting for 30.4 percent and those who travelled alone were 16.6 percent, of total visitors.

**Table 2.3: Number of Visitors by Travel Party**

Travel Party	Number of Visitors	% of Total
With other friends and relatives	14,293	36.6%
With spouse	11,869	30.4%
Alone	6,472	16.6%
With spouse and children	3,899	10.0%
With children	2,483	6.4%
<b>TOTAL</b>	<b>39,016</b>	<b>100%</b>

### Sex

Table 2.4 shows that out of the 39,016 visitors, 20,898 were males, accounting for 53.6 percent of the population, whereas the remaining 18,118 were females, accounting for 46.4 percent of the visitors.

**Table 2.4: Visitors by Sex**

Sex	Number of Visitors	% of Total
Males	20,898	53.6%
Females	18,118	46.4%
<b>TOTAL</b>	<b>39,016</b>	<b>100%</b>

### Purposes of Visit to Tanzania

Figure 2.1 shows that most of the visitors came to Tanzania for leisure and holidays (76.1 percent), followed by those on business and visiting friends and relatives, each category comprising 9.0 percent of the total. The remaining visitors; for other purposes (others), whose activities included study tours and sports, accounted for 5.9 percent of the total.

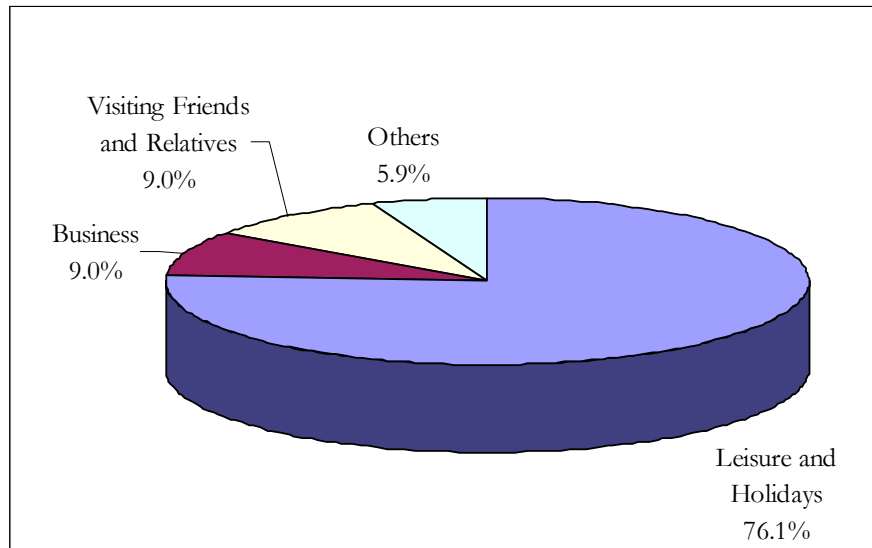


Fig. 2.1: Interviewees by Purpose of Visit

### Mode of Transport to Tanzania

The results in figure 2.2 reflect the importance of air transportation in the tourism industry. Nearly 67 percent of the respondents who entered Tanzania used air transport, while 32.4 percent came by road.

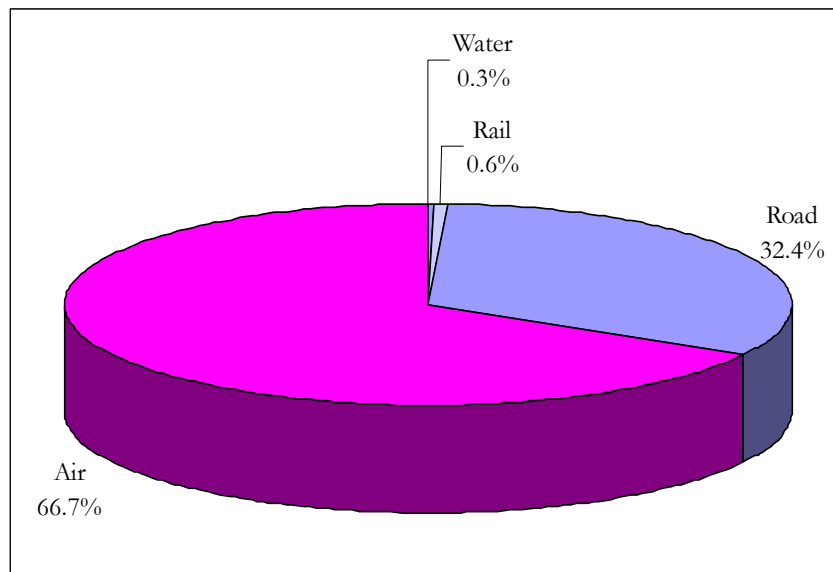


Fig. 2.2: Visitors by Mode of Transport Used in Entering Tanzania

**Source(s) of Information**

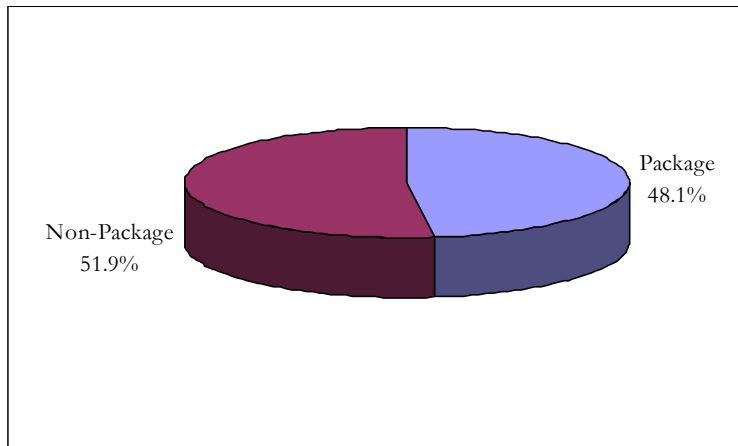
It is observed from table 2.5 that travel agents, word of mouth, guidebooks and tour operator brochures have been the key sources of information accounting for 29.9 percent, 24.9 percent, 19.0 percent, and 11.5 percent of total visitors, respectively. The other category comprises; prior stays and visits, school classes and television documentaries.

**Table 2.5: Visitors by Source(s) of Information**

Source	Total	% of Total
Travel Agents	10,519	29.9%
Word of mouth	8,766	24.9%
Guide Books	6,701	19.0%
Tour Operator Brochures	4,050	11.5%
Internet	2,871	8.2%
Other	2,086	5.9%
Tanzania Tourist Board	185	0.5%
<b>TOTAL</b>	<b>35,178<sup>3</sup></b>	<b>100.0%</b>

**Travel Arrangement**

Survey results show that 51.7 percent of all visitors travelled on a non-package tour, whereas those on a package arrangement amounted to 48.3 percent of all visitors.



**Fig. 2.3: Number of Interviewees by Travel Arrangement**

<sup>3</sup> The total excludes low season survey respondents as the questionnaire on source of information was different.

An attempt has been made to identify items that were included in the package tours. According to the results, the most frequently observed combinations of package tour items have been developed in association with corresponding frequencies from the whole range of visitors. The combinations are displayed in a descending order as shown in table 2.6.

**Table 2.6: Main Package Item Combinations**

S/N	Accommodation	Food and drink	International transport	Internal transport	Sightseeing	Number of Visitors	%of total
1	√	√	√	√	√	9,267	49.3
2	√	√	....	√	√	2,233	11.9
3	√	√	√	√	....	1,832	9.7
4	√	√	√	....	...	1,306	6.9
5	√	√	√	....	√	656	3.5
6	√	√	....	....	√	338	1.8
7	√	....	√	√	√	240	1.3
8	√	....	√	....	....	145	0.8
9	√	....	....	√	√	98	0.5
10	All other item combinations					2,680	14.3
<b>Total</b>						<b>18,795</b>	<b>100.0</b>

Results on table 2.6 show that about half of all the package tour visitors were on a five-item package comprising accommodation, food and drinks, international transport, internal transport and sightseeing. A package without 'international transport' was the second in prominence. The survey results reveal that accommodation is a key item in the package tour arrangements.

### **Duration of Trip in the United Republic of Tanzania**

Considering all source markets, table 2.7 indicates that 94.1 percent of the visitors coming to the United Republic of Tanzania stayed for not more than 28 days. Majority of them fall within the '8-28 nights' category, with frequency of 54.7 percent, followed by those in '4-7 nights' 32.2 percent. The '1-3 nights' group accounted for 7.2 percent, whereas, those who spent 29 nights or more accounted for only 0.6 percent.

**Table 2.7: Visitors by Nights Spent in the United Republic of Tanzania**

Nights Spent	Number of Visitors	% of Total
1 – 3 nights	2,742	7.2
4 – 7 nights	12,576	32.2
8 – 28 nights	21,362	54.7
29 – 91 nights	2,085	5.3
92 – 365 nights	244	0.6
<b>TOTAL</b>	<b>39,009<sup>4</sup></b>	<b>100.0</b>

**Visits to Competing Countries and Comparative Cost of Touring Tanzania**

Table 2.8(a) and 2.8(b) present the feelings of visitors regarding comparative cost of visiting Tanzania and competing countries during the low, peak and mini-peak season surveys, respectively. It should be noted that the questionnaire was amended during the peak and mini-peak season surveys after realising that Mauritius, a country that has tourism products comparable to Tanzania, was left out.

**Table 2.8(a): Visits to Competitors and Comparative Cost of Touring Tanzania: Low Season**

Country	Much Higher %	Higher %	Same %	Lower %	Much Lower %	Total %	Responses
Kenya	7	24	41	23	4	100	882
S. Africa	19	28	16	24	13	100	587
Zimbabwe	16.0	33	25	16	10	100	427
Botswana	11	26	26	29	7	100	270
Uganda	7	23	43	22	5	100	370
Seychelles	13	18	21	27	20	100	114

**Table 2.8 (b): Visits to Competitors and Comparative Cost of Touring Tanzania: Peak and Mini-peak Seasons**

Country	Much Higher %	Higher %	Same %	Lower %	Much Lower %	Total %	Responses
Kenya	11.6	32.2	25.7	28.0	2.6	100.0	4,224
S. Africa	21.9	26.8	18.9	25.8	6.6	100.0	3,543
Zimbabwe	25.8	25.2	26.5	16.4	6.0	100.0	2,523
Botswana	14.9	26.8	30.6	22.7	4.9	100.0	1,658
Uganda	11.6	28.9	41.0	16.2	2.2	100.0	1,431
Mauritius	17.4	22.8	27.1	27.6	5.0	100.0	1,011
Seychelles	14.3	21.1	25.2	30.1	9.2	100.0	607

<sup>4</sup> Some visitors did not indicate their duration of stay in Tanzania.

The result indicates that there were different feelings among the tourists interviewed. There were those who thought Tanzania was more expensive; others indicated that it was moderate and yet others felt that it was a less expensive destination. However, the results were not conclusive as the responses varied as depicted in the two tables.

### Repeat Visits in the Last 5 Years Preceding the Survey

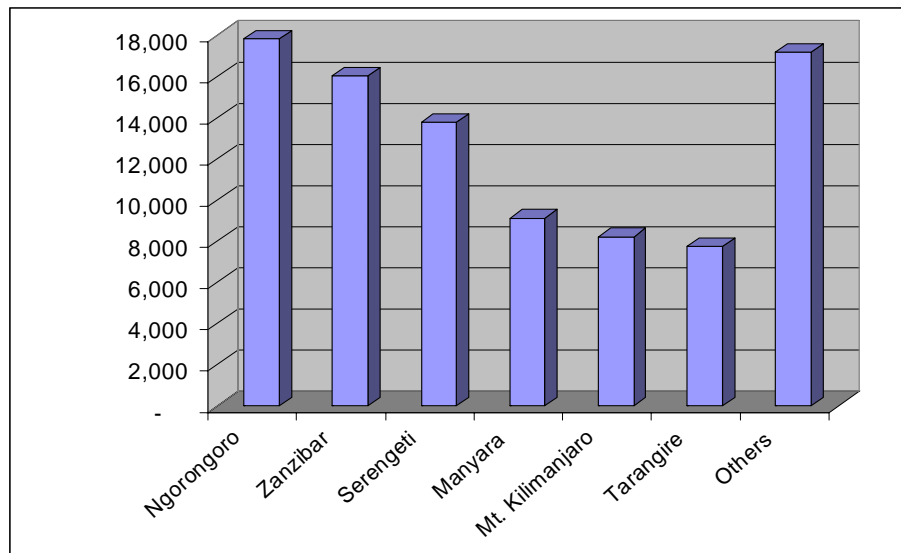
Table 2.9 shows that 73.5 percent were new visitors, whereas 21.6 percent were repeat visitors.

**Table 2.9: Frequency of Visits to Tanzania in 5 Years Preceding the Survey**

Frequency	Number of Interviewees	% of Total
Once ( <i>new visitors</i> )	13,079	73.5
Twice	890	4.9
More than Twice	3,847	21.6
<b>TOTAL</b>	<b>17,806</b>	<b>100.0</b>

### Attractions Visited

Ngorongoro Crater recorded the highest number of visits amounting to 17,855 (or 53.5 percent) of total responses, followed by Zanzibar 16,042 (48.1 percent), Serengeti 13,802 (41.4 percent), Manyara 9,122 (27.3 percent), and Mt. Kilimanjaro 8,221 (24.6 percent), as shown in figure 2.4: Some of the visitors went to more than one attraction.



**Fig. 2.4: Visits to Attractions**

Note: 'Others' include: Arusha National Park, Museums, Mikumi, Bagamoyo, Selous, Ruaha, Amboni caves, Udzungwa, and Gombe.

**Potential Visits**

Table 2.10 shows that majority of the visitors (94.8 percent) indicated that they would like to visit Tanzania again, which largely signifies satisfaction.

**Table 2.10: Inclination to Visiting Tanzania Again**

**Areas for Improvement**

The visitors pointed out that the infrastructure, hygiene at tourist attractions and value for money were among the areas that needed improvement as shown in table 2.11.

**Table 2.11: Areas of Improvement as Suggested by Visitors**

	Number of Interviewees	% of Total
Would visit again	17,892	94.8
Would NOT visit again	978	5.2
<b>TOTAL</b>	<b>18,870</b>	<b>100</b>
<b>Area for Improvement</b>	<b>Number of Visitors</b>	<b>% of Total (18,805)</b>
Infrastructure	11,580	61.6
Hygiene at attractions	2,882	15.3
Value for money	2,334	12.4
Facility at entry/departure	1,702	9.1
Environmental Conservation	1,287	6.8
Harassment by public service dept.	923	4.9
Banking service	760	4.0
Health and rescue services	695	3.7
Corruption of law enforcers	641	3.4
Availability of up to date information	609	3.2
Language competence	259	1.4
Air transportation	204	1.1
Availability of cultural tourism	117	0.6

**Departure Points**

The peak and mini-peak season results depicted in figure 2.5 point out that, of the total recorded visitors, 33.5 percent of total respondents, departed through Dar es Salaam International Airport, whereas 26.2 percent departed through Namanga. Likewise, 23.2 percent departed through Zanzibar, while 14.6 percent, 1.5 percent,

and 1.0 percent departed through Kilimanjaro International Airport, Kasumulo and Holili, respectively.

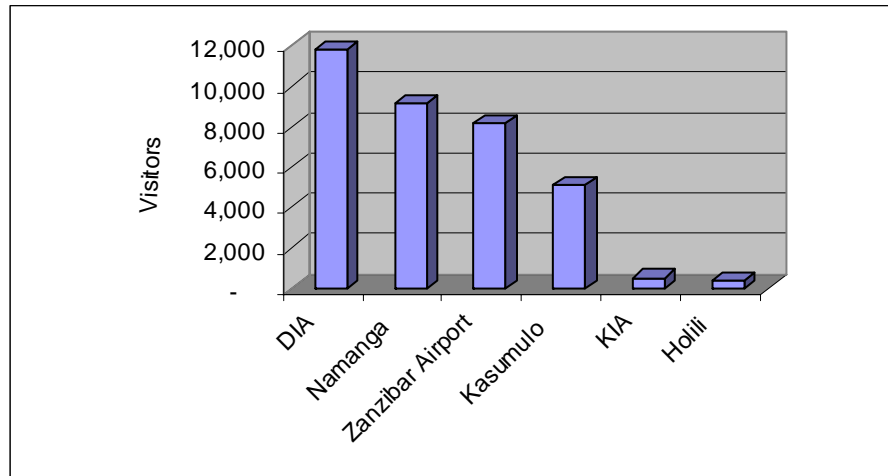


Fig. 2.5: Visitors by Departure Points: Peak and Mini-peak

### Questionnaire Languages

After getting complaints from some of the visitors during the low season on the usage of English language only, it was decided to translate the questionnaires into four languages namely; Italian, French, Spanish and German. Thus, the questionnaires used in the peak and mini-peak surveys were printed in five languages. Table 2.12 shows that English respondents topped the list with 74.9 percent, followed by Italian respondents at 11.3 percent, while French respondents were in the third position at 5.5 percent. The Spanish ranked fourth at 4.6 percent and the German respondents recorded the lowest percentage of 3.7 percent.

Table 2.12: Languages

Languages	Visitors	% of Total
English	26,354	74.9
Italian	3,974	11.3
French	1,926	5.5
Spanish	1,631	4.6
German	1,293	3.7
<b>TOTAL</b>	<b>35,178</b>	<b>100</b>