Assessment of the Status of Domestic Tourism in Tanzania

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The author’s views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.
ABSTRACT

The objective of the study is to assess the status of domestic tourism in Tanzania. Empirical survey was conducted among 228 middle-income respondents who are considered potential domestic tourists and ten (10) key tourism experts and stakeholders involved in and/or impacting on Tanzania’s current and potential domestic tourism market including tourism public sector representatives, tour operators, lodges, hotels, attractions authorities and other relevant stakeholders. The study also surveyed 79 private sector service providers, to analyse and understand the potential opportunities and obstacles in exploiting domestic tourism and conducted price-mapping analysis to 15 hotels in Karatu area. Secondary data from wildlife areas protection authorities was also collected.

Study results show that there is great potential for domestic tourism in Tanzania. However, high prices charged for the tourism services at local facilities including 'expensive destination' perception and the non-availability of cheaper packages; culture of Tanzanians of wanting to visit their home places during holidays (affecting participation in wildlife tourism); inadequate information about attractions and products as a result of inadequate marketing; lack of a mechanism to collect data for domestic tourism for areas outside protected areas; putting more efforts in the development and marketing of international tourism; and inadequate product diversification (monotonous tourism product offerings) to appeal to different age groups are the major factors inhibiting the growth of domestic tourism in Tanzania.

Key recommendations emanating from the study focus on improving domestic tourism marketing strategies; encouraging service providers to accommodate domestic Tourists; enhanced domestic tourism travel facilitation within protected areas (removal or reduced concession fees); ensuring diversification of domestic tourism products (instead of concentrating on wildlife, which is very familiar to many due to their upbringing); carrying out a domestic tourism market survey to determine domestic tourists market needs and preferences so as appropriate measures are taken to boost the sector and coming up with mechanisms to collect data on domestic tourists outside those visiting protected areas.
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<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
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<tr>
<td>HMLC</td>
<td>The Hierarchical Model of Leisure Constraints (HMLC)</td>
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<td>MNRT</td>
<td>Ministry of Natural Resources and Tourism</td>
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<td>TANAPA</td>
<td>Tanzania National Parks</td>
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<tr>
<td>NCAA</td>
<td>Ngorongoro Conservation Area Authority</td>
</tr>
<tr>
<td>TAWA</td>
<td>Tanzania Wildlife Authority</td>
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<tr>
<td>TABOA</td>
<td>Tanzania Bus Owners Association</td>
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<tr>
<td>TTB</td>
<td>Tanzania Tourist Board</td>
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<tr>
<td>S!TE</td>
<td>Swahili International Tourism Expo</td>
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<tr>
<td>UNWTO</td>
<td>United Nations World Tourism Organisation</td>
</tr>
<tr>
<td>VFR</td>
<td>Visiting Friends and Relatives</td>
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<tr>
<td>WMA</td>
<td>Wildlife Management Areas</td>
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<tr>
<td>SME</td>
<td>Small and Medium Enterprises</td>
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<tr>
<td>WTTTC</td>
<td>World Travel and Tourism Council</td>
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<tr>
<td>SES</td>
<td>Socio-Economic status (SES)</td>
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<tr>
<td>NTSS</td>
<td>National Tourism Sector Strategy</td>
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<tr>
<td>SAT</td>
<td>South Africa Tourism</td>
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<tr>
<td>LSM</td>
<td>Living Standards Measure</td>
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<tr>
<td>CSPPro</td>
<td>Census and Survey Processing System</td>
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<td>HBS</td>
<td>Household Budget Survey</td>
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<td>NDT</td>
<td>National Department of Tourism (NDT)</td>
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<tr>
<td>GDP</td>
<td>Gross Domestic Product</td>
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<td>CWMAC</td>
<td>Community Wildlife Management Areas Consortium:</td>
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<td>NTB</td>
<td>Namibia Tourism Board</td>
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<tr>
<td>TATO</td>
<td>Tanzania Association of Tour Operators</td>
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CHAPTER ONE

BACKGROUND TO THE STUDY

1.1 Introduction

Tourism plays important role to the Tanzanian economy. In 2016, the sector contributed 26 % to the total export earnings from 1, 284,279 international tourists who earned the country US$ 2.1 billion. Notwithstanding these positive contributions, this sector is still facing a number of challenges including levels of seasonality, tourism product geographic spread and differing levels of travel and tourism culture within the local people. Literature points out that domestic tourism, which is somehow neglected in Tanzania, can play important role in addressing these challenges. Amidst volatility of international tourism, destinations worldwide are increasingly turning towards domestic tourism as contributor to sustained tourism economy (Kruger&Douglas 2015, cited in Smeral, 2010). It is stated that a vibrant domestic tourism sector can “cushion the industry from fluctuations of the international tourism market and bring stability and predictability in the industry” (Okello et al, 2012).

Domestic tourists use locally owned facilities, thereby minimizing leakages and promoting backward and forward tourism businesses linkages (Canavan, 2012). This is because the revenue made is retained locally. Moreover, growth in the tourism industry may lead to other industries that rely on those that supply the tourism industry. According to the World Travel and Tourism Council -WTTC (2017), domestic spending makes up the largest part of worldwide travel (71.8% in 2016) and is forecasted to reach US$5, 414.1bn in 2027. Domestic tourism has been noted to foster national pride among citizens, bridge the seasonality gap, increase employment, investment opportunities as well as increase benefits to Small and Medium Enterprises (SME). Additionally, continued growth in domestic tourism is linked to the trend for shorter holidays closer to home, a phenomenon referred to as “staycation” (Papatheodorou et al., 2010) and as reported by Kruger&D Douglas (2015), global trends indicate that tourism is becoming a regional/national rather than a global phenomenon.
Kruger and Douglas further urged that domestic tourism remains an under-researched theme in developing countries partly due to the difficulty to track domestic tourism and with governments and policy makers placing emphasis on attracting higher expenditures of foreign visitors. Both the benefits and problems of emerging mass domestic tourism have been largely ignored by policy makers in developing countries, despite the increased importance of this market to these economies (Alipour et al., 2013; Hampton & Jeyacheya, 2014). According to Ghimire, (2013), even in countries where the number of domestic travellers exceeds that of international travellers, domestic tourism development takes place without any systematic government planning. In Africa, South Africa represents one of the few examples of a developing country where the national government has made domestic tourism an explicit priority (Rogerson & Lisa, 2005). The National Department of Tourism (NDT) has pointed out increasing domestic tourism contribution as a percentage of the overall tourism contribution to GDP from 54.8% in 2009 to 60% by 2020.

What makes Tanzania’s case unique is the fact that literature on domestic tourism is almost non-existent. Visitor numbers to most attractions by residents and the performance of the sub-sector in general is also not available save for the National Parks, Game reserves, Conservation Area, antiquities and Museums. Tanzania has put most of the resources and focus on attracting international tourists to the detriment of domestic tourism potential. Domestic tourism is being emphasized without proper planning or even a strategy to create awareness among the locals to participate in domestic tourism.

1.2 Statement of the Problem

Like most African countries, Tanzania’s tourism industry heavily relies on wildlife resources, the wilderness and international tourists. Tourism mainly takes place in protected areas, especially in the northern circuit wildlife parks of the country. To that end the country has set aside 28% of its land for nature-based activities. Although Tanzania’s tourism industry has been growing for the past two or so decades, little is known about the country’s domestic tourism market.

In recent years Tanzania has experienced a rise in people’s living standards over time; about 20% or less of the population is classified as middle class (Deloitte & Touché, 2014). The middle class
has greater spending power, lives in urban centres, and has more recreational time (Deloitte & Touché, 2012). The middle incomes spending power and recreational time is beneficial to the growth of the tourism industry since the sector is influenced by the economic strength of a country and its people (Wen, 1997). Overlooking domestic travel could mean that Tanzania will never realize the full potential of its tourism sector and fail to address issues that are very pertinent to this type of tourism. Research indicates that participation in tourism is a function of tourism constraints experienced by tourists themselves (Kruger & Douglas, 2015).

There has been a push to promote domestic tourism to be used as complementary market to the volatile international market. Tanzania Tourist Board (TTB), Tanzania National Parks (TANAPA), Ngorongoro Conservation Area Authority (NCAA) together with other stakeholders have been making efforts including creating special packages to promote domestic tourism. Despite these campaigns to boost domestic tourism, local participation in tourism is still low. There are several key questions to ask: Is culture the main barrier? Maybe Tanzanians do not value travelling and watching animals and beaches? Or is it economic? Household budgets are just too tight? Or the prices for Tanzanians are too high? Is it true that the ongoing campaigns are insufficient and not well tailored to specific groups of people, ready to spend? Have they reached out to groups of such as expatriates, middle class elites, business communities, schools, colleges, etc?

Tourism stakeholders are of the opinion that, if Tanzania is to see a major impact of tourism in the economy and welfare of the people, the number of domestic tourists must increase. In many countries such as South Africa, where the tourism sector is well developed, the number of domestic tourists is much higher than foreign tourists. In Tanzania, most public institutions and private enterprises dealing with marketing of tourism, direct most efforts and energy to international tourism markets and only a little is done on domestic tourism. Effective promotion and packaging of affordable domestic tourism products, and balancing the focus of marketing between domestic and international tourism are considered important in increasing the number of domestic tourism.

Multiple assumptions have prevailed as to why local tourism is low in Tanzania, among them being local culture not favouring tourism, low public awareness, costs associated to visiting these places,
and also poor documentation (e.g. it is argued that there is huge domestic tourism in beaches, which is not reported, as opposed to record keeping in controlled areas like game reserves, WMAs, and national parks.

It is therefore important to identify the challenges faced by the development of this important sector. This study therefore engages prospective tourists, and tourism stakeholders to explain this problem. The study contributes to the body of literature in several ways. Firstly, to fulfill the requirements of the client in assessing the status of domestic tourism, secondly, there is need for literature on the subject to generate knowledge and understanding to aid policy direction and marketing. Thirdly, the views of the stakeholders and prospective tourists are very critical as they are the leading drivers in tourism development and as such their views help shed light into challenges faced by domestic tourism. Lastly through understanding the challenges, proper and appropriate interventions can be implemented to aid the development of domestic tourism in Tanzania.

1.3 Objectives of the Study

The two objectives of this assignment are to(i) assess the status of domestic tourism in Tanzania, including analyzing the current state of domestic tourism, previous efforts to develop local tourism, current initiatives to promote domestic tourism, challenges encountered, and efforts planned by the public and private sector to boost local tourism; and(ii) provide recommendations for the public institutions, private sector players, and for USAID Protect project for strengthening the domestic tourism sector in Tanzania.

The findings of this study will be used by: (i) the government, to properly plan how to boost local tourism; (ii) the private sector, to understand new ways to grow their business beyond dependence on foreign visitors; (iii) Non-Governmental Organizations (NGOs) and donors (“facilitators) that are working to support and promote conservation-led economic and tourism growth in WMAs, National Parks, beaches, nature reserves, game reserves, etc.; (iv) WMAs/AAs, to evaluate community marketing plans; (v) Community Wildlife Management Areas Consortium (CWMAC), to help identify proper mechanisms on how to boost local tourism in WMAs.
1.4 Scope of the Study

The study has covered stakeholders in five cities/municipals namely Dar es Salaam, Moshi, Dodoma, Iringa, Mwanza and Arusha. The said areas were selected purposely because they are regarded to have more middle class population; they are near the major tourist sites and were easily accessible during the study.

1.5 Organization of the Study

This study has six chapters. Chapter one is introduction; Chapter two gives an Overview of the initiatives to boost Domestic Tourism in Tanzania. Chapter three is devoted to review of theories and empirical literature related to domestic tourism participation. Chapter Four describes the methodology used in the study. Chapter Five represents results of the analysis of the status of domestic tourism in Tanzania and Chapter Six provides possible mechanisms to boost domestic tourism in Tanzania including summary of the study, recommendations and policy implications.
CHAPTER TWO

INITIATIVES TO BOOST DOMESTIC TOURISM IN TANZANIA

2.1 Introduction

This chapter reviews domestic tourism development initiatives and strategies in Tanzania. The chapter discusses economic reforms, which took place in the mid-1980s, their impacts on the tourism industry and the efforts by various stakeholders to develop and promote domestic tourism in Tanzania.

2.2 Overview of Domestic Tourism Development initiatives in Tanzania.

In Tanzania Tourism began to pick up in the mid-1980s as a result of the economic liberalization policies (Luvanga and Shitundu 2003; Chambua, 2005). As part of the implementation of the Trade liberalization policy, in 1991, the first National Tourism Policy was developed and in 1993, Tanzania Tourist Board was formed to promote and market tourism, in and out of Tanzania with an aim of making the country the number one tourist destination in Africa. In 1999, the 1991 Tourism Policy was reviewed and the same recognized domestic tourism as important segment to promote and had set strategies to develop and promote domestic tourism.

The overall policy strategy for domestic tourism is against the backdrop of enabling Tanzanians to participate in domestic tourism and be able to sample the attractions available in the country. The strategy is to facilitate preferential tariffs to citizens; introduction of, and encouragement to secondary school students to undertake tourism studies; encouraging institutions to hold their annual meetings in areas with tourist attractions; and to encourage tailor-made programmes for the purpose of optimal utilization of capacities and services during the low tourist season.

In effort to implement the policy, the Tourism Master Plan was developed in 1996 and reviewed in 2002. The Master Plan among other things, recognised that although limited in size, domestic tourism market for Tanzania is potential and consists of three main segments, namely Tanzanian
residents with high disposable incomes; expatriate residents, employed by foreign firms and agencies; and group travel – clubs, schools, etc. To implement the said strategies, various implementing institutions and stakeholders have been putting efforts to develop and promote domestic tourism.

According to TTB, several efforts have been done/are being done by both public and private institutions to promote domestic tourism. These include different awareness campaigns including a campaign titled “Utalii Uanzena Mtanzania Mwenyewe”, “Twende Zetu Kutoshi” and TANAPA’s campaign of “Twede Kutoshi”, which all targeted to create awareness to locals to participate in domestic tourism.

Several stakeholders were engaged to promote domestic tourism in the country. Some of such initiatives have extensively centred on encouraging the mass media including TVs to play significant role in sensitizing the Tanzanians to take part in domestic wildlife tourism. Of these promotional efforts, the most popular has been sensitizing the media stakeholders to participate in promoting domestic wildlife tourism. As response TV programs that promote domestic tourism such as the “Kambi Popote” (meaning camping anywhere) of Clouds Television, “Utalii wa ndani” by Channel ten have been organized by television stations specifically targeting potential domestic tourists. Based on these realities, it would be expected that more locals would get enlighten and sensitized to participate in domestic tourism (Kyando, 2013).

In 2014 TTB established Swahili International Tourism Expo (S!TE). According to TTB the objectives of S!TE among others are to (i) bring tourism service providers under one roof and allow locals get required information regarding tourism (ii) Offer the local markets the opportunity to buy cheap holidays (iii) disseminate the value of a domestic tourism to the general public and; (iv) expose local Tanzanians to the available range of the tourist products available in the country. Since its inception, the Expo has been performing fairly well.
TTB launched online Tourism Destination Portal” (www.tanzaniatourism.com) and an App accessible on “smart phones”; which also allows service providers to advertise their products and services to potential tourists including domestic tourists to allow them book and pay for some subscribed accommodations and other services online. TTB has also been participating in Schools lectures to try and entice students participate in domestic tourism.
In 2017 TTB in partnership with Tanzania Bus Owners Association (TABOA) launched domestic tourism video, aiming at showing tourism promotional films in upcountry passenger buses. This was done taking into consideration that buses are the major means of transport used by most of the prospective domestic tourists. The films shown in upcountry buses were meant to entice the local participation in domestic tourism.

**Figure 3- Launching of TTB Domestic Tourism Promotional Films**

On its part, the Ministry of Natural Resources and Tourism (MNRT) together with the institutions under it had been actively participating in different events such as Dar Es Salaam International Trade Fair, Nanenane fair, Karibu Kusini and Tanga Trade fair where domestic tourism awareness is carried out and promotional packages for locals to visit tourist attractions such as national parks and Ngorongoro crater are offered.

The government through institutions responsible for management of protected areas namely TANAPA and NCAA has been doing a lot to promote domestic tourism. These efforts include regular reviews of park fee rates making them more preferential to locals with a view of encouraging them to visiting attractions in the protected areas. In addition to these efforts, TANAPA has established low cost accommodation facilities in almost every National park to encourage locals visit the national parks.
In 2012, TANAPA established Media Awards which is an annual event allowing local journalists and media practitioners to showcase their competence in producing media content that educates the public on the importance of conservation of natural resources for current and future generations as well as promoting domestic tourism (Arusha Times, 13 October 2012).

**Figure 4-TANAPA Domestic Tourism Promotion Campaign**

![Figure 4-TANAPA Domestic Tourism Promotion Campaign](source:www.tanzaniaparks.go.tz)

Recognizing the important role-played by domestic tourists, individual operators in marketing for domestic tourist market, hotels and tour operators set low tariff rates for local residents. Currently there are resident and non-resident rates for some of the hotels in Tanzania.
Notwithstanding the various efforts by different stakeholders to develop and promote domestic tourism, the situation for domestic tourism in Tanzania is not different from most of other African countries. Visitor numbers to most attractions by residents and the performance of the sub-sector in general is also not available save for the institutions under the MNRT notably Antiquities Division, Museums, TANAPA, NCAA and Tanzania Wildlife Management Authority (TAWA) which have set systems to collect statistics for visitor numbers to the protected areas. According to MNRT, Domestic tourists in Tanzania are estimated at slightly near a million (881,941 and 803,756 in 2015 and 2016 respectively). However, this number represents only those tourists who visit protected areas where a system of registering the visitors is available.
According to WTTC report economic impact of tourism in Tanzania 2017, domestic travel spending generated 27.6% of direct Travel & Tourism GDP in 2016 compared with 72.4% of visitor exports, that is foreign visitor spending or international tourism receipts. Domestic travel spending was expected to grow by 8.4% in 2017 to TSH.2, 251.8bn, and rise by 6.7% pa to TSH.4, 324.7bn in 2027. Similarly, visitor exports were expected to grow by 2.0% in 2017 to TSH.5, 564.0bn, and rise by 6.9% pa to TSH.10, 799.9bn in 2027.
Since the implementation of the economic liberalization policies in the mid-1980s, several strategies and initiatives have been set to develop and promote domestic tourism participation in the country. Such efforts include putting in place the first National Tourism Policy in 1991 and the establishment of Tanzania Tourist Board to promote and market tourism in and out of Tanzania in 1993. The National Tourism Policy of 1991 was reviewed in 1999, which among others set strategies to develop and promote domestic tourism. Tourism Master Plan was developed in 1996 and reviewed in 2002 as a policy implementation tool. To implement the said strategies, various implementing institutions and stakeholders have been putting efforts to develop and promote domestic tourism in the country. Notwithstanding the efforts, the numbers of domestic tourism available are less than a million. This number only includes domestic tourists visiting protected areas.
CHAPTER THREE

LITERATURE REVIEW

3.1 Introduction.

This chapter discusses challenges of defining domestic tourist, reviews theories and empirical literature related to domestic tourism participation. Through the literature review, previous studies have been utilized to examine the effects of culture, age, race, gender, education, and income in domestic tourism. In this review, first, the concept of leisure constraints including constraint models has been studied to investigate their effects on domestic tourism participation. Secondly, the influences of socio-demographic constraints on leisure constraints have been identified and studied. Finally, empirical studies related to the state of domestic tourism and case studies on the performance of domestic tourism in some African counties have also been reviewed.

3.2 Conceptualizing the Domestic Tourist.

Domestic tourism is defined by the UNWTO as “someone who travels for business or leisure purposes, outside their usual environment but within the national borders of their “country of residence”, for a minimum of 24 hours. Domestic tourism is referred to as part of “internal tourism” along with inbound tourism as consumption for both forms of tourism is taking place within the country. Challenges have however been noted in the definition and measurement of the “domestic” tourist. Some definitions consider the distance travelled away from normal place of residence, some include same-day visitors while others exclude them and others include only those accommodated in lodging facilities neglecting Visiting Friends and Relative (VFR). Though defining this segment is hard, gathering the data is even harder due to lack of clear methodology in the approach to data collection. UNWTO (2007) further compounds the definitional conundrum as it draws a distinction between a domestic tourist and a domestic visitor.

A domestic tourist travels outside the “usual environment” overnight for any tourism purpose including visiting one’s second home, while a visitor doesn’t stay overnight outside the usual environment. This definition brings a critical issue that needs to be carefully considered in a
Tanzanian context. The term “usual environment”, which is fundamental to tourism, poses problems in defining it. Literature sometimes attaches the notion of usual environment to an individual while in some instances it relates to a household (Libreros, M. (1998). Some authors argue that individuals in the same household can have different “usual environments”. This becomes even more profound when considered along the second issue raised above of “second homes”. By definition, a second home is a “dwelling used for temporal visits by the owner or someone else, and is not the user’s permanent place of residence” (Marjavaara, 2008 cited in Lelokwane M, 2017).

In Tanzania it is not unusual for people to have more than one places of residence. People from Kilimanjaro region for example travel home in December for different reasons, but greatest among all is family unification, especially when the parents are still alive. Parents enjoy seeing their sons and daughters accompanied with their children, majority of them have homes both ways.

“ Majority of the Wachagga manage to travel home for Christmas because in the village they enjoy some social services just like in urban areas for example electricity, reliable water supply, infrastructure and well-equipped health facilities. Majority of them have houses, which are of the same quality as those they own in urban areas. These houses in their ancestral homes have tape water, electricity, and even good kitchen”

The village residence is considered a permanent home and visited often. In this sense the distinction between the two concepts of “usual environment” and “second home” in Tanzanian context can be indistinct and often poses difficulty in consideration of VFR as a tourism activity.

However, in the context of this study, much emphasis is on domestic visits that involve interaction with the tourism industry without essentially discriminating VFR. Such could be business, leisure, medical, entertainment, recreation and VFR as long as such visits involve what UNWTO definition

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1Daily News, November 27, 2016
of domestic tourist is all about, i.e. comprises activities of a resident visitor within the country of reference, either as part of a domestic tourism trip or part of an outbound trip.

### 3.3 Constraints To Consume Tourism Products.

#### 3.3.1 Leisure Travel Related Constraints.

It is indicated that tourists will often have more than one motivation to travel; the lists of tourist motivations are extensive and often present a combination of simultaneous motives (Kruger and Douglass, 2015 cited in Pearce & Lee, 2005). It has been specified that the main purpose of trip for domestic travel include pilgrimages, VFR, business travel, and increasingly a segment of leisure travel (Rogerson, 2004). Kruger and Douglass indicate that intrinsic motivations may include relaxation, family togetherness, escapism and achievement. Crawford and Godbey (1987) identified three categories of constraints that influence leisure participation. The Hierarchical Model of Leisure Constraints (HMLC) demonstrates that people’s aspirations to take part in leisure-related activities are hindered by intrapersonal, interpersonal and structural constraints (Crawford et al., 1991).

**Figure 8-Hierarchical Model of Leisure Constraints**

In this model, constraints are identified as those aspects that influence people’s leisure preferences, deter participation and lessen the level of enjoyment and satisfaction in leisure, frequently leading in non-participation. According to the HMLC, intrapersonal constraints influence an individual’s psychological state and shape the development of leisure preferences. These include the perceived suitability of various leisure activities, perceived self-skill, prior socialization into particular leisure activities, kin and non-kin reference group attitudes, religion, anxiety, depression, stress, shyness and fear (Crawford et al., 1991; Kruger & Douglas, 2015).

3.3.1.1 Intrapersonal constraints

Intrapersonal constraints are internal or psychological constraints. These constraints are related to prior experiences, causing individuals to either have an interest in a particular type of leisure activity or not. For instance, people sometimes have a habit to choose leisure activities based on experiences. According to Henderson, Bialeschki, Shaw and Freysinger 1996 cited in Tae 2007) preference or lack of interest in a particular activity is influenced by self-confidence.

Figure 9- Interpersonal Leisure Constraints

<table>
<thead>
<tr>
<th>Constraints</th>
<th>Preferences</th>
<th>Participation or Non-Participation</th>
</tr>
</thead>
</table>

Source: Crawford and Godbey, 1987

3. 3.1.2 Interpersonal constraints

Interpersonal constraints occur within social interactions and exchanges and include the lack of partners’, and families’ and friends’ interest to participate (Thapa, 2012). Interpersonal constraints may change across life stages and are mainly influenced by types of activities, family size and marital status (Nyaupane & Andererck, 2007). Interpersonal constraints are related to social and cultural constraints. People sometimes feel that they need partners for them to enjoy participating in a certain activity. This is to say that this type of constraints is connected to association with
other individuals, which affect an individuals’ preference for a leisure activity (Arnold and Shinew, 1998 cited in Tae 2007).

Fig. 3.3.1.2.1 Interpersonal Leisure Constraints by Crawford and Godbey

<table>
<thead>
<tr>
<th>Interpersonal Constraints</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barriers</td>
</tr>
<tr>
<td>Preference</td>
</tr>
<tr>
<td>Participation</td>
</tr>
</tbody>
</table>

Source: Crawford and Godbey, 1987

3.3.1.3 Structural constraints

Structural constraints are intervening factors that can be related to group attitudes concerning the suitability of certain activities, availability and knowledge about opportunities, the scheduling of work time, climate, season financial resources and family life cycle (Crawford & Godbey, 1987). Constraints are experienced hierarchically with intrapersonal ones experienced first followed by interpersonal constraints. Structural constraints interfere with leisure participation and preference. If individuals have preference for a particular activity, they try to reduce barriers in order to participate.

Fig. 3.3.1.3.1 Structural Leisure Constraints by Crawford and Godbey

<table>
<thead>
<tr>
<th>Structural Constraints</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preferences</td>
</tr>
<tr>
<td>Barriers</td>
</tr>
<tr>
<td>Participation</td>
</tr>
</tbody>
</table>


Since the inception of the HMLC model, some authors have also expanded the model. Jackson, Crawford, & Godbey (1993) extended their hierarchical leisure constraints model to include the role of negotiation and motivational processes. Kimm (2009) developed a pyramid model of leisure
activity participation constraints and a three-factor model of leisure activity participation constraints as an extension to the HMLC and Zhang et al. (2012) extended the model to develop a conceptual model of constraints’ effects on preference, participation and satisfaction.

Jackson (1993 cited in Kruger and Douglass, 2015) identified six dimensions of constraints that appear to be common across settings: (a) social isolation: characteristics that involve interaction between people; (b) accessibility: lack of or limited access to transportation; (c) personal reasons: representing an individual’s abilities or motivations; (d) cost: experience costs or the cost of equipment; (e) time: referring to levels and intensity of participation; and (f) facility: crowding and maintenance.

3.3.2 Influences of Socio-Demographic Characteristic Constraints

According to Tae 2007, socio-demographic characteristics are related to the extent of leisure constraints because they influence participation. Lovaglia (2000) states “status position in society is relative to others and arranged in layers. The socio-demographic characteristics in Lovaglia’s study of stratified groups include gender, socio-economic status, race, and age and are used to examine how these characteristics affect constraints on leisure participation.

3.3.2.1 Influences of Gender Constraints

Searle and Jackson (1985) cited in Tae (2007), pointed out that women faced more constraints than men, especially in regard to family responsibilities, security, and transportation, which reduces women’s involvement. Additionally, Deem (1986) cited in Tae 2007, argues that women are reluctant to participate in these activities if they do not earn their own income. According to him, women are more likely to spend money for satisfaction of family life than they are for satisfaction of their own life. Henderson and Allen (1991) indicate that constraints, such as lack of time, interest, money, facilities, opportunities, were associated with low rates of female involvement. Women prefer to participate in social meetings regarding family care and home issues, rather than participating in outdoor activities like adventure recreation, which they find unsuitable (Lee et al. 2001 cited in Tae 2007).
Shaw (1994) suggests that a patriarchal society inhibits women’s participation in leisure activities. For example, in a typical patriarchal society, males are given the privilege of participating in outdoor recreation, while females care for the family and housework. This belief limited women’s participation in leisure activities.

**3.3.2.2 Influences of Education and Income Constraints**

According to (Tae 2007) socio-economic status (SES) variables, such as income and education, affect leisure involvement even though they were not considered in previous studies. According to Kelly (1996) cited in Tae 2007, education and income variables are significantly related to leisure involvement because they often directly contribute to participation opportunities and barriers. Kerry argues that financial resources are required to participate in leisure activities. While the poor consider cost of living, the rich consider quality of life. This means, rich people look for opportunities to engage in leisure activities, while poorer people avoid such participation due to lack of financial resources.

Kelly (1996) further, argues that education influences leisure participation more than other factors because education is significantly associated with leisure socialization. For instance, an individual of higher education has more opportunities for leisure participation. This is true because individuals of higher education are more likely than individuals of lower education to pursue quality of life and colleagues or fellows ask to take part in leisure activities frequently.

Lucas (1990) cited in Tae 2007, also argues that education influences outdoor wilderness visitation. According to his study of U.S. National Park visitors, of all park visitors throughout the year, 60 to 80 % were college graduates. He indicates that individuals with low education do not have the proper activity skills for visiting national parks, nor do they know the history of such places. According to these findings, higher education encourages individuals to take part in leisure activities. These arguments conclude that there is a positive relationship between education and participation in leisure activities such as domestic tourism.
3.3.2.3 Influences of Racial/Ethnic Constraints

Several researchers studied theories to examine the differences in leisure behaviors among ethnic and racial groups in terms of social class. Washburne (1978) cited in Tae 2007, argue that lack of facilities, transportation, and low income are the factors that lower leisure involvement. Floyd et al. (2006) racial differences in leisure involvement were associated with differences in SES and racial discrimination. Wilson (1978, 1980) investigates the differences in leisure behavior by comparing low- and middle-class African Americans. Wilson (1980) finds out that African Americans have different leisure behaviors according to social classes. For instance, lower-class African Americans tend to spend their spare time at home watching TV or sleeping. On the other hand, middle-class African Americans visits public places during their leisure time.

Floyd (1999) finds that African Americans usually spend their leisure time with friends in shopping malls, while Anglo Americans visit parks and participate in outdoor recreation with family and colleagues. On the other hand, African Americans and Native Americans are less likely to enjoy forest-based recreation, since they regard parks as lands of oppression (Meeker, 1973; Taylor, 1989; Harris, 1997; Johnson, 1998 cited in Tae 2007). These findings suggest that minority groups tend to participate less in leisure activities not only because they are in different social classes rooted in historical inequality, but also because of their differing cultural values.

3.3.2.4 Influences of Age Constraints

Levinson (1978 cited in Tae 2007) argues that individuals pursue different leisure activities according to where they are in their lifespan. To illustrate this idea, Gordon et al. (1976) found out that, in comparison, individuals were less likely to participate in outdoor recreation in the last phase of the lifespan. Gordon therefore found that the percentage of leisure participation declines from about 80% in the early adulthood to about 20% in late adulthood. Kelly (1980) finds that individuals tend to participate less in outdoor recreation, as they get older, instead spending more time on social and family activities.
The reasons why the elderly are less likely to participate in outdoor activities are associated with their physical constraints, socialization, and their fears of violence and socialization. Physical constraints also called developmental effects and are caused by declining biological function that occurs with increased age (Floyd 2006).

3.3.3 Constraints to visiting wildlife protected areas

Although, there is a growing popularity of nature-based tourism (Wight, 2002; Teigland, 2000 cited in Kruger and Douglass, 2015), it has been found that individuals perceive constraints to participation in nature-based tourism comparable to that of traditional leisure activities. The World Bank Study (2007), *Zambia economic and poverty impact of nature-based tourism*, urged that despite the attractiveness of wildlife and natural amenities, a lack of quality infrastructure places a serious limitation on visitations to parks by both domestic and international visitors. In a study on examining structural constraints to visit Kafue National Park, Zambia, (Thapa, 2012) found that international and domestic visitor segments indicated varying degrees of perceived constraints, with structural constraints being more common among domestic visitors.

In Kenya, Okello et al., (2012) found that poor marketing and finances were the main constraints for local Kenyans. When studying factors influencing the surrounding domestic population to visit Nairobi National Park in Kenya (Okello et al., 2012), found out that majority (66%) of the community had visited the park. The study noted that the key constraints were lack of extra disposable income (structural), high cost of food and hospitality services inside the park for local communities (structural), and poor marketing of parks especially targeting local Kenyans (structural). Preference for other forms of recreation and lack of information and time were identified as major constraints to parks visitations in Florida (Pennington-Gray, Thapa& Holland, 2002). Pennington-Gray and Kerstetter (2002) discovered that individuals perceive nature-based tourism constraints to be similar to those found in traditional leisure activities. Hence the authors established that the most significant constraints were structural.

Butler and Richardson (2013) observed a perception by mostly young people that national parks in South Africa are “not exciting for young people” and that “... Wildlife is for white people”. These
authors believe are a result of a dark past associated with apartheid South Africa that reinforced messages that national parks are the exclusive preserve of “whites”. However, in spite of cultural and racial background, novelty also plays a role in the choice of domestic attractions, a point emphasized mostly in support of diversification of attractions in different areas in a destination.

According to Sustainable development paper presented at RIO Earth Summit 1992 by Brundtland (1987), entitled “Our common future”, domestic tourism faces following problems: First the sector requires immense resources and commitment because most of it involves a lot of development of artificial facilities as opposed to natural attractions and more so a lot of infrastructure and complimentary services have to be developed. Secondly, it needs stronger political leadership to ensure wide participation and consensus building especially when it comes to resource commitment for development activity. Raising everyone’s interest and support to make domestic tourism sustainable is absolutely necessary. However, it is pretty difficult due to localized competition and vested individual stakeholders’ interests. Josiah Mwisyo Ngula (2010) pointed a couple of reasons making Tanzanians not participate in domestic tourism. These include; Lack of tourism product diversification, inadequate domestic tourism promotion and high prices for tourism products and services.

It is generally reported that the challenges facing the tourism sector in Tanzania and Africa in general is lack of domestic tourism (Andrew, 2008 cited in Kazuzuru 2014). There are problems associated with heavy reliance on inbound tourism which include the creation of seasonal unemployment during low peak seasons, inflation due to the money being pumped into the country, appreciating country’s exchange rate which negatively affects other export industries (Blake, 2008), risking the country in the case of diplomatic conflicts with key source markets; and intermittent political crises such as the Kenyan election of 2008. These problems can be significantly reduced if domestic tourism is promoted. In other countries, such as Australia, domestic tourism forms the core of the industry and contributes quite substantially to GDP (Athanasopoulos and Hyndiman, 2006).
3.4 Domestic Tourism Development for some countries in Africa.

3.4.1 Botswana

Botswana has experienced a rise in people’s living standards over time; 48% of the population in Botswana is classified as middle class (Deloitte & Touché, 2012). The middle class has greater spending power, lives in urban centres, and has more recreational time (Deloitte & Touché, 2012 in Stone 2017). However, like in Tanzania, Botswana’s tourism industry heavily relies on wildlife resources and the wilderness. Tourism mainly takes place in protected areas, especially those in the northern and north-western parts of the country, particularly the Okavango Delta and Chobe National park (Lenao, 2015). Although Botswana’s tourism industry has been growing for the past two decades (Lenao, 2015), little is known about the country’s domestic tourism market.

Although Botswana is a popular tourist destination for Westerners, particularly those from North America and Europe (Mbaiwa, 2011 cited in Stone. M (2017), domestic tourists visiting protected areas (the main tourism attractions) make up a small proportion of visitors. Of the 301,940 protected area visitors in 2013, only 24,737 (8.2%) were citizens compared to 214,577 (71.1%) international tourists (Department of Wildlife and National Parks, 2014). Visiting Friends and Relatives (VFR) is the leading reason for engaging in travel for 63.2% of domestic tourist; 85% of all overnight domestic tourists stay with friends/family (Department of Tourism [DoT], 2012). Although extant data indicates that most international tourists visit the Kasane/Chobe area, Maun, and the Okavango Delta, there is no indication where the 15.9% domestic leisure travelers travel (DoT, 2012 cited in Stone M, 2017).

According to WTTC, in 2016, Botswana Domestic travel spending generated 51.2% of direct Travel & Tourism GDP compared with 48.8% for visitor exports (i.e. foreign visitor spending or international tourism receipts). Morupis (2016) identifies Culture of Botswana people, lack of preparedness, and benefits in participating in domestic tourism vis-a-vie access, monotonous products and high prices as factors, which hinder the growth of domestic tourism in Botswana. In his study, Domestic Tourism in Botswana: an Examination of Nature – Based Tourism Constraints, Stone.
M (2017), revealed that out of thirty-five respondents, 58% indicated that they had visited protected areas in Botswana as part of school trips. Only fifteen of these indicated that they had visited after this initial encounter, although nine travelled there for work related activities. With twenty-five (42%) having never visited national parks in Botswana, forty-eight (80%) respondents indicated that with better conditions in place they would visit the protected areas for leisure purposes.

3.4.2 South Africa

Government of South Africa declared tourism as one of the six pillars for economic growth. The National Department of Tourism committed to creating 225 000 jobs and increasing tourism economic contribution to GDP by R499 billion by the year 2020, amongst other imperatives. This commitment is provided for in the National Tourism Sector Strategy (NTSS), which was approved by the Cabinet in March 2011 and called for the development of a Domestic Tourism Growth Strategy for South Africa. This was in recognition that Domestic Tourism is an essential contributor to the growth of the tourism economy.

In 2011 South Africa Tourism (SAT) undertook a research on the state of domestic tourism in South Africa. The research indicated that most people have not had an opportunity to travel in South Africa as a result of a number of reasons which range from, "cannot afford to travel (32%), no reason to take a trip (20%), time constraints (17%), no income/unemployment (11%), and dislike travelling (10%)". The research also discovered that there was lack of a travel culture amongst South Africans, especially amongst the previously disadvantaged communities as a result of limited marketing and information provision to all segments of South Africa’s population. Furthermore, there was limited product development and diversification, cognisant of geographical spread and seasonality (Domestic Tourism Growth Strategy –DTGS- 2012-2020). To ensure that the development of the domestic tourism is guided by vision and a coordinated approach to its implementation, Domestic Tourism Growth Strategy (2012-2020) was launched in 2012.

According to Statistics, South Africa (Stats SA, 2017) total expenditure on domestic overnight trips increased from R62 billion in 2015 to R63bn in 2017, while day trips saw a decrease in expenditure
from R25bn in 2015 to R23bn in 2016. The biggest spending during day and overnight trips was on domestic transport, shopping, food and beverages. More than 80% lasted an average of one week at their destination. Day trips were largely undertaken for shopping, followed by visiting friends and relatives. Tourists undertook overnight trips mostly for leisure, attending funerals and visiting friends and relatives,” South Africa’s Department of Tourism reports that, the tourism industry’s contribution to gross domestic product (GDP) has grown from R372bn in 2014 to R375bn in 2015.

Domestic Tourism Growth Strategy uncovered some of the joint initiatives being implemented in South Africa to boost domestic tourism. These include Loyalty incentive schemes particularly within the hospitality sector; new developments such as online booking systems and emergence of easily accessible transaction points like retail outlets; Government products in particular the national and provincial parks, as well as some local government resorts and theme parks, have significantly contributed to stimulating and providing for domestic tourists; and awareness raising through the implementation of the Sho’t left campaign.

3.4.3 Namibia

Currently, Namibia’s tourism market caters primarily to international tourists while domestic tourism is ignored. With the domestic market as a virtually untapped resource in Namibia, the potential for development is considerable (Moseley et al, 2016). Presently, insufficient information about domestic tourism hinders the market from progressing and organizations from improving domestic tourism. There is a growing concern that Namibians generally do not have a culture of taking vacations, as many prefer to go to their villages.

“Domestic tourism has for many years been neglected one of the things Namibia didn’t really do right over a couple of years was to promote a dual price system, whereby lodges offer different prices to locals and then to international visitors”².

²Chairperson of the Federation of Namibian Tourism Association (Fenata) Bernd Schneider
Namibian lodges and hotels were supposed to be affordable to locals, but are currently not affordable to many. In this regard Schneider called on the local tourism industry to establish and develop infrastructure that fits into that cost profile. However, Namibia Tourism Board (NTB) continues to actively promote various domestic campaigns aimed at creating awareness, which has led to an increase in domestic travel. According to Namibian Domestic tourism survey carried out by Namibian Ministry of Environment and Tourism in 2016, visiting Friends and Relatives (VFR) was the most popular purpose of visit for day trips, representing almost one-quarter (24%) of all trips, or around 480,000 in 2015. Combining these with Wedding/Funeral (another form of VFR) shows that one-third (33%) of all-day visits (around 700,000) were for some form of visiting friends and relatives travel.

Leisure/Holiday travel accounted for almost 14% (around 280,000) of all day trips, and combined with Shopping (a form of leisure travel at 17%) generated a total of 31% (almost one-third) of all-day trips (around 630,000 trips in 2015). Business/Conference travel was significant at almost 16% (almost 326,000 trips), as were Medical/Wellness trips at over 11% of all-day trips (almost 230,000). The top three reasons for households not travelling on day trips during the year were being too busy at work or school, for financial reasons, or simply not having enough time to travel. These three accounted for almost 62% of all responses.

With regards to overnight trips, visiting Friends and Relatives (VFR) trips were marginally the most popular type of travel for overnight trips (over 1.2 million), accounting for over 32% of all overnight travel. Leisure/Holiday trips accounted for almost 32% of all trips (almost 1.2 million). However, VFR combined with Wedding/Funeral generated a total share of almost 52% of all overnight trips (over 1.9 million trips in 2015). Overnight Business/Conference trips accounted for a smaller proportion of overnight trips (7.5%) than Day Trips, and also generated fewer actual trips (around 280,000 in 2015). Very few overnight trips were for Shopping or Medical/Wellness purposes. Note that Medical/Wellness trips were mainly for medical purposes – very few trips were for wellness (spas, etc.).
The top three reasons for households not travelling on overnight trips during the year were financial reasons; being too busy at work or school, and places they wanted to visit being too far to travel. These three accounted for almost 58% of all responses.

Namibians tend to return to their villages of origin; instead of touring and exploring other places in the country (https://www.newera.com.na, accessed Sunday 11 March 2018). According to the Namibia National Sustainable Tourism Growth and Development Strategy 2016-2026, there is no culture of taking vacations among Namibians to the extent that many do not take leisure holidays at all.

“In their vacation time they go ‘up north’ to their villages. There is a need to raise awareness of the preferences of international visitors, since the culture does not exist locally.”

3.5 Syntheses of Literature.

From the reviewed literature, the major issues that emerged from the discussion are on what influences domestic tourism participation. There appears to exist consensus among researchers as to which variables measure determinants of domestic tourism participation. The reviewed literature has revealed that the people’s aspirations to take part in domestic tourism related activities are hindered by intrapersonal, interpersonal and structural constraints. Impacts of social, culture, education, income, inadequate awareness, inadequate domestic tourism facilities and services, costs are also among the hindrances emphasized for domestic tourism participation.

From the reviewed literature about Tanzania, it is quite clear that the objectives of other studies were different from the objectives of the current study, which tries to assess the Status of Domestic Tourism in Tanzania. Furthermore, instead of focusing only on a domestic tourism in the wildlife protected areas, this study also looks at why locals rarely participate in domestic tourism. The study uses the UNWTO (2013) definition of a domestic tourist. While this chapter has provided the theoretical and empirical literature related to the study, the next chapter describes methodology used in the study.

3Namibia National Sustainable Tourism Growth and Development Strategy 2016-2026,
CHAPTER FOUR
STUDY METHODOLOGY

4.1 Introduction

This study employed a research design that involved qualitative and quantitative approaches of data analysis. The methodology has been tailor made based on the overall objective of this assignment, which is to assess the status of domestic tourism in Tanzania and understand factors influencing domestic tourism in the country, which also entails previous efforts to develop local tourism, current initiatives to promote domestic tourism including efforts by both the public and private sector to boost local tourism and the challenges encountered in the development and promotion of domestic tourism. Therefore, in order to have a clear understanding of these issues, the study has provided recommendations for the public institutions as well as the private sector players to enable them to strengthen domestic tourism sector in Tanzania.

4.2 Study Area

The study covered six major cities in Tanzania to accomplish survey data collection for the said assignment. Given time and budget limitations, the strategy has been adopted to maximize time and budget resources, so as to allow the expansion of sample size. The selected areas are those areas that are regarded to have more middle-class population, near the major tourist sites and were easily accessible during the survey. The table 4.2.1 summarizes the selected Regions, Districts and wards where survey was conducted.
### Table 1 - Sample Areas

<table>
<thead>
<tr>
<th>Region</th>
<th>District</th>
<th>Ward</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arusha</td>
<td>Arusha City Council, Ngorongoro and Karatu</td>
<td>Njiro, Sekei, Karatu</td>
</tr>
<tr>
<td>Dar es Salaam</td>
<td>Kinondoni</td>
<td>Masaki, Mikocheni</td>
</tr>
<tr>
<td>Iringa</td>
<td>Iringa District Council</td>
<td>Ilala, Gangilonga</td>
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<tr>
<td>Kilimanjaro</td>
<td>Moshi Municipal Council</td>
<td>Bondeni</td>
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<tr>
<td>Mwanza</td>
<td>Nyamagana</td>
<td>Isamilo, Capripoint</td>
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<tr>
<td>Dodoma</td>
<td>Dodoma Urban</td>
<td>Majengo, Chamwino</td>
</tr>
</tbody>
</table>

### 4.3 Sampling Frame, Sampling and the Sample Size

#### 4.3.1 Sampling Frame

The sample frame for this assignment targeted respondents from middle-income households in urban centres. Given that; travels and tourism activities such as leisure are function of income and/or consumption, therefore these activities are rare to individuals living below food poverty line (TSh 38,070, US$17) and the basic needs poverty line (TSh 53,377, US$23.90), as defined by the Household Budget Survey (HBS) in 2014/15. Although the main focus is the middle-income respondents who are the most consumers of leisure (i.e. tourism products) but due to literature limitations on Tanzania domestic tourism the study also collected information from a handful of tourism service providers (tour operators, accommodation establishments and protected areas authorities) to gain their perspectives on domestic tourism sector.

#### 4.3.2 Sampling

The study used two-stage sampling for selecting respondents to be interviewed. Random selection of regions, districts and wards urban centres where middle-income respondents live were made. Random selection was also used to select tourism service providers (tour operators and accommodation establishments), while focus group discussion technique was used to randomly
selected tourism experts (from both private sector and tourism management authorities) to provide an insight to the tourism sector.

4.3.3 Sample Size

The study by Simon Freemantle (2014), estimated that, Tanzania has approximately over 100,000 middle-income households, which are just about 10% of the population equivalent to about 5 million individuals. Therefore, given there are about 100,000 middle-income households in Tanzania. The study used the calculated effective sample size of 228 middle-income respondents, within a 5% margin of error, 95% confidence level and 30% probability from previous studies to maximize variance. Also, the study collected information from 10 tourism experts through focus group discussion. Participants were purposively selected from two categories; public sector and private sector operators included Tanzania. From these categories, one senior officer (Managing Director from TTB was selected, One Senior officer was Selected from TANAPA (Marketing Manager), One senior officer was selected from NCAA (Manager for Tourism Services) and two senior tourism officers were selected from Tourism Division. On the private sector side two managers from reputable hotels based in NCAA, executive Secretary of TATO, Kiroyera Tours and Director Kili Promotions Ltd.

On the supply side, the study surveyed 79 private sector service providers (i.e. hotels, tour operators and travel agent companies), to analyse and understand the potential opportunities and obstacles in exploiting domestic tourism. Additionally, the study conducted a specific price mapping analysis to 15 hotels in Karatu area, which is near Ngorongoro Crater, with the view to ascertaining on whether, the rates charged by such hotels may be suitable to cater for the domestic tourist market. Finally, the study collected secondary data from TAWA, TANAPA, NCAA and College of African Wildlife Management, Mweka.

Table 2 - Respondents Sample Distribution

<table>
<thead>
<tr>
<th>Region</th>
<th>District</th>
<th>Ward</th>
<th>No. of Respondents</th>
<th>Service Providers</th>
</tr>
</thead>
</table>

31
4.4 **Data Type and Data Collection Methods**

4.4.1 Data Type

The assignment required the quantitative and qualitative data components to assess the status of domestic tourism in Tanzania and understand factors influencing domestic tourists in the country, including previous efforts to develop local tourism, current initiatives to promote domestic tourism, efforts planned by the public and private sector to boost local tourism and challenges encountered. Therefore structured questionnaire and focus group discussion to capture expert opinion have been used to deliver quantitative and qualitative data.

4.4.2 Data Collection Methods

Structured questionnaires were used to collect information from 228 respondents and 79 service providers. The Respondents questionnaire consisted of 30 questions divided into 4 parts: 1) socio-demographic characteristics of respondents and household composition (i.e. income; expenditure) 2) Vacation and Domestic Tourism 3) Day Trips and Domestic Tourism; 4) Over Night Trips and Domestic Tourism. The questionnaire was entered, edited, tabulated and tested by using business survey with the aid of Census and Survey Processing System (CSPro) software installed in tablets to minimize errors in the questionnaires during data collection and data entry.
The study adopted Focus Group Discussion approach as a data collection procedure to capture the experts’ opinion in the tourism sector, particularly domestic tourism. According to Onwuegbuzie et al. (2009) focus groups are less threatening or intimidating given the environment is made comfortable for the participants in order for them to discuss and express themselves. Overall, the study focus group involved nine participants were selected using an expert sampling technique. This type of purposive sampling technique is used where there is need to gain knowledge from individuals that have particular expertise (Teddlie & Yu, 2007 cited in Morupisi & Mokgalo (2017). Focused group discussions targeting prominent tourism professionals, Tour operators, other tourism service providers, managers of protected areas and public institutions responsible for tourism product development and marketing were carried out to ascertain their views on the state of domestic tourism in the country including current efforts to promote the sub sector and the associated challenges.

4.5 Analytical Framework

Quantitative data analysis technique has been employed to analyze data collected for this study. Qualitative and quantitative (descriptive statistics and preference ranking) analysis were used to determine the status of domestic tourism in Tanzania and understand factors influencing domestic tourists in the country, including previous efforts to develop local tourism, current initiatives to promote domestic tourism, efforts planned by the public and private sector to boost local tourism and challenges encountered.

The data recorded by enumerators was exported, synchronised and analysed by using the statistical package SPSS Software Package. The data has been disaggregated (i.e. gender, age group, area of residence etc); hence a detailed descriptive analysis of the data is presented and discussed.

4.6 Work Plan

This study was carried out between March and May 2018. The chart 4.6.1 and Box 3.6.2 below specifies activities against weeks and actual working days on the execution of this study.
Figure 10- Work Plan Summary

1. Introductory Phase
- Activities:
  - Preparation and finalization of work scope (conceptual framework and objectives of the assignment).
- Outputs/Reports:
  - Final proposal/Inception report

2. Field Work Phase
- Activities:
  - Finalizing the Field Instruments (questionnaires),
  - Pretesting of tools,
  - Data collection, and
  - Data analysis
- Outputs/Reports:
  - Study sample, Study instrument, Draft report

3. Reporting Phase
- Activities:
  - Presentation of the draft report, and
  - Incorporation of the comments.
- Outputs/Reports:
  - Final report
### Table 3 - Activities by Weeks

<table>
<thead>
<tr>
<th>Activities</th>
<th>March</th>
<th>April</th>
<th>May</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>W1</td>
<td>W2</td>
<td>W3</td>
</tr>
<tr>
<td>Commencement of the assignment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finalizing the Work-plan (proposal and submission)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sampling, tools development &amp; presentation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pretesting of research tools</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Data collection in sampled areas</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Data analysis</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Draft report writing &amp; submission</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Presentation of the draft final report</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The table above lists the activities divided by weeks for March, April, and May.
4.7 Quality Assurance and Measures

Quality Control was integral part of the entire process starting from the earliest stages. This was done to minimize deviation between the planned activities and what actually happens on the ground, so as to immediately take corrective measures in order to avoid unnecessary losses.

There was close supervision during enumeration so as to prevent or minimize errors that could be attributed to the performance of the enumerator, respondents and survey instruments. Enumerators for data collection activity were recruited and trained to ensure that enumerators are knowledgeable with general research methodologies (objectives and methods) of this assignment. Training on the hard copy as well as digitized tool used for data capturing process was imparted to enumerators.

Therefore, the quality control team was available to monitor the performance of daily data collection, and spot-check all data collection activities. Periodic review sessions will be held with the interviewing teams. To ensure high quality of data, there was back-checking of key interviews and regular checks on enumerators to ensure they adhere to the agreed standards, procedures and instructions during interviews and that, all of them abided to the instructions as per training so as not to compromise data quality.
CHAPTER FIVE

EMPIRICAL RESULTS ON THE STATUS OF DOMESTIC TOURISM IN TANZANIA

5.1 Introduction

This chapter provides a detailed analysis of the findings recorded from the field regarding the assessment of status of domestic tourism in Tanzania. The chapter has two major sections, section one is about respondents' descriptive statistics, which is divided into three parts descriptive analysis, which provides detailed results of the sample respondents' characteristics, part two which provides detailed results of the service providers' characteristics including size, location, number of people employed, and services provided. Part three provides the descriptive analysis of participants of focused grouped discussions. Section two of the empirical results of the study discusses the status of domestic tourism in Tanzania.

5.2 Respondents Descriptive Statistics

This section provides detailed results of the sample respondents' characteristics including respondents, gender, age, marital status, and education level, place of residence and income level.

5.2.1 Respondents Place of Residence
The study covered a total of 228 middle-income respondents who are potential domestic tourists from six regions as follows: Arusha 35 respondents, Dar es Salaam 55 respondents, Dodoma 31 respondents, Iringa 30 respondents, Kilimanjaro 47 respondents and Mwanza 30 respondents.

5.2.2 Gender of Respondents

The study considered gender balance, whereby out of 228 respondents 53.9 % were female and 46.1 % were male. Gender-balanced respondents are an important factor for the assessment of the status of domestic tourism.

Table 4 - Gender of Respondents

<table>
<thead>
<tr>
<th>Gender of respondents</th>
<th>Frequency</th>
<th>%</th>
<th>Cumulative %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>123</td>
<td>53.9</td>
<td>53.9</td>
</tr>
<tr>
<td>Male</td>
<td>105</td>
<td>46.1</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>228</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

Source: Field Findings

5.2.3 Age of Respondents

The study also considered the representation of all age groups, where out of 228 respondents surveyed in the study, 25 respondents were aged between 15 – 24 years, 148 were aged 25 – 45 years, 35 were aged between 46 - 65 and 20 were aged between 65 years and above.

Table 5 - Age of Respondents

<table>
<thead>
<tr>
<th>Age of respondents</th>
<th>Frequency</th>
<th>%</th>
<th>Cumulative %</th>
</tr>
</thead>
<tbody>
<tr>
<td>15 - 24 years</td>
<td>25</td>
<td>11</td>
<td>11</td>
</tr>
<tr>
<td>25 - 45 years</td>
<td>148</td>
<td>64.9</td>
<td>75.9</td>
</tr>
<tr>
<td>46 - 65 years</td>
<td>35</td>
<td>15.4</td>
<td>91.3</td>
</tr>
</tbody>
</table>
5.2.4 Marital Status

Empirical findings of the study have revealed that, out of 228 respondents surveyed, 27.9% were single, 66.7% were married, 1.8% were divorced, and 3.9% were widow/widower. Respondents’ variation in marital status is an important factor in understanding household behaviour towards consumption of tourism services.

Table 6 - Marital Status of Respondents

<table>
<thead>
<tr>
<th>Marital status of respondent</th>
<th>Frequency</th>
<th>%</th>
<th>Cumulative %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single (never married)</td>
<td>63</td>
<td>27.6</td>
<td>27.6</td>
</tr>
<tr>
<td>Married</td>
<td>152</td>
<td>66.7</td>
<td>94.3</td>
</tr>
<tr>
<td>Divorced</td>
<td>4</td>
<td>1.8</td>
<td>96.1</td>
</tr>
<tr>
<td>Widow/widower</td>
<td>9</td>
<td>3.9</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>228</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

Source: Field Findings

5.2.5 Occupation of Respondent

The study also has considered occupational variation of respondents, where out of 228 respondents, 32 were students, 124 government employees, 55 private sector employees, and 17 business owners.

Table 7 - Occupation of Respondents

<table>
<thead>
<tr>
<th>Occupation of respondent</th>
<th>Frequency</th>
<th>%</th>
<th>Cumulative %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student</td>
<td>32</td>
<td>14.0</td>
<td>14.0</td>
</tr>
<tr>
<td>Government Employee</td>
<td>124</td>
<td>54.4</td>
<td>68.4</td>
</tr>
</tbody>
</table>
### 5.2.6 Educational Level of Respondent

Educational variation of respondents is an important element in assessing the status of Tanzania domestic tourism. Therefore, 10.1% of respondents have secondary education level, 25% have attained vocational training, 63.6% have university degree education level and 1.3% have postgraduate level of education.

#### Table 8 - Education Level of Respondents

<table>
<thead>
<tr>
<th>Education level of respondent</th>
<th>Frequency</th>
<th>%</th>
<th>Cumulative %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secondary education</td>
<td>23</td>
<td>10.1</td>
<td>10.1</td>
</tr>
<tr>
<td>Vocational Training</td>
<td>57</td>
<td>25.0</td>
<td>35.1</td>
</tr>
<tr>
<td>University degree</td>
<td>145</td>
<td>63.6</td>
<td>98.7</td>
</tr>
<tr>
<td>Other</td>
<td>3</td>
<td>1.3</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>228</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

*Source: Field Findings*

### 5.2.7 Income Level of Respondent’s Household

The income variable of respondents is an important factor in understanding the status of Tanzania domestic tourism. Therefore, out of 228 respondents, 18% earn under Tsh10 million per year, 39% earn between Tsh10 - 20 million per year, 22.4% earn Tsh 20 -30 million per year, 6.6% earn between Tsh 30 – 40 million per year and 14% earn over Tsh 50 million per year.
Table 9 - Income Level of Respondents

<table>
<thead>
<tr>
<th>Income per year (in TSH million)</th>
<th>Frequency</th>
<th>%</th>
<th>Cumulative %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 10</td>
<td>41</td>
<td>18.0</td>
<td>18.0</td>
</tr>
<tr>
<td>10 – 20</td>
<td>89</td>
<td>39.0</td>
<td>57.0</td>
</tr>
<tr>
<td>20 -30</td>
<td>51</td>
<td>22.4</td>
<td>79.4</td>
</tr>
<tr>
<td>30 – 40</td>
<td>15</td>
<td>6.6</td>
<td>86.0</td>
</tr>
<tr>
<td>50 and above</td>
<td>32</td>
<td>14.0</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>228</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

Source: Field Findings

5.3 Service Providers Descriptive Statistics

This section of descriptive analysis provides detailed results of the service providers’ characteristics including size, location, and number of people employed, services provided.

5.3.1 Location and number of Service Providers involved in the study

The study has reached a total of 79 service providers within the tourism sector from the same six regions whereas; Arusha 18 respondents, Dodoma 10 respondents, Iringa 12 respondents, Kilimanjaro 11 respondents, Mwanza 12 respondents and Dar es Salaam 16 respondents.
Table 10 - Locations and Number of Service Providers

<table>
<thead>
<tr>
<th>Region where the company operate</th>
<th>Frequency</th>
<th>%</th>
<th>Cumulative %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arusha</td>
<td>18</td>
<td>23</td>
<td>23</td>
</tr>
<tr>
<td>Dar es Salaam</td>
<td>16</td>
<td>20</td>
<td>43</td>
</tr>
<tr>
<td>Iringa</td>
<td>12</td>
<td>15</td>
<td>58</td>
</tr>
<tr>
<td>Kilimanjaro</td>
<td>11</td>
<td>14</td>
<td>72</td>
</tr>
<tr>
<td>Mwanza</td>
<td>12</td>
<td>15</td>
<td>87</td>
</tr>
<tr>
<td>Dodoma</td>
<td>10</td>
<td>13</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>79</td>
<td>100</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Source: Field Findings

5.3.1 Size of the Service Providers

To capture the supply side in understanding domestic tourism in Tanzania, the study survey 79 firms with different scope, where 13 % of service providers were small companies hiring less than 10 people, 57 % were medium service providers hiring less than 100 people and 30 % were large companies hiring more than 100 people.

Table 11 - Size of the Service Providers

<table>
<thead>
<tr>
<th>The size of the firm</th>
<th>Frequency</th>
<th>%</th>
<th>Cumulative %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small</td>
<td>10</td>
<td>13</td>
<td>13</td>
</tr>
<tr>
<td>Medium</td>
<td>45</td>
<td>57</td>
<td>70</td>
</tr>
<tr>
<td>Large</td>
<td>24</td>
<td>30</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>79</td>
<td>100</td>
<td>100.0</td>
</tr>
</tbody>
</table>
5.3.2 Service Providers Activities

The major services offered by tourism sector service providers surveyed include, 53% were hotels providing accommodation, food and beverages, 6% were car hiring companies, 30% were tour operators providing tour services and 10% were companies that provided both accommodation and tour services.

Table 12 - Service Providers Activities

<table>
<thead>
<tr>
<th>Main Services offered</th>
<th>Frequency</th>
<th>%</th>
<th>Cumulative %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation, Food</td>
<td>42</td>
<td>53</td>
<td>54</td>
</tr>
<tr>
<td>and Beverages.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Car Hire</td>
<td>5</td>
<td>6</td>
<td>60</td>
</tr>
<tr>
<td>Tour Services</td>
<td>24</td>
<td>30</td>
<td>90</td>
</tr>
<tr>
<td>Tours and</td>
<td>8</td>
<td>10</td>
<td>100.0</td>
</tr>
<tr>
<td>Accommodation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>79</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

5.4 Descriptive Analysis of Focused Group Participants

This section provides descriptive analysis results of the Focus group Discussions of 10 tourism experts. Participants were purposively selected and grouped into two categories; 5 from public sector and 5 from private sector operators.
<table>
<thead>
<tr>
<th>No.</th>
<th>Category</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Public Sector</td>
<td>One senior officer (Managing Director from TTB)</td>
</tr>
<tr>
<td>2</td>
<td>Public Sector</td>
<td>One Senior officer was Selected from TANAPA (Marketing Manager)</td>
</tr>
<tr>
<td>3</td>
<td>Public Sector</td>
<td>Two senior tourism officers were selected from Tourism Division</td>
</tr>
<tr>
<td>4</td>
<td>Private Sector</td>
<td>Two managers from reputable hotels based in NCAA (Ngorongoro Serena Lodge, Ndutu Safari Lodge)</td>
</tr>
<tr>
<td>5</td>
<td>Private Sector</td>
<td>Executive Secretary of TATO</td>
</tr>
<tr>
<td>6</td>
<td>Private Sector</td>
<td>Director Kili Promotions Ltd.</td>
</tr>
<tr>
<td>7</td>
<td>Private Sector</td>
<td>Kiroyera Tours</td>
</tr>
</tbody>
</table>

*Source: Field Findings*

### 5.5 The State of Domestic Tourism in Tanzania

This section discusses the empirical results of the study on the status of domestic tourism in Tanzania. The behaviour and cultural attitude of respondents is examined regarding consumption of tourism products during vacation, day trips and overnight trips. Also, the role of service providers is examined in promoting domestic tourism through undertaking initiatives to attract locals in tourism activities. Views of tourism experts in the factors limiting domestic tourism are also examined.

#### 5.4.1 Description of the purposes of travel for Day Trippers

Leisure travel which includes entertainment, (e.g. cinema, concerts), visit to zoos, visit cultural, historical and heritage sites, eating out, nightlife, beach holidays, wildlife viewing and sports, is the most popular purpose of visit for day trips accounting for 28% (around 3382 trips) of all day
trips made within a year. When combined with Shopping (a form of leisure travel at 12%) generated a total of 40% of all-day trips.

Visiting Friends and Relatives (VFR) is the second most popular purpose of visit for day trips, representing 24% (around 3008) of all trips. Combining these with Wedding/Funeral (another form of VFR at 5% of 656 trips) shows that 29% of all-day visits were for some form of visiting friends and relatives travel.

Business/Conference/professional travel is significant at almost 23% (almost 2784 trips), as were Medical/Wellness trips at over 8% of all-day trips (almost 993). Note that Medical/Wellness trips were mainly for medical purposes – very few trips were for wellness (spas, etc.).

**Figure 11 - Purpose of Travel for Day Trippers**

![Pie chart showing the percentages of different purposes of travel for day trippers.]

*Source: Field Findings*

### 5.4.2 Description of the Purposes of travel for Overnight Trippers

Visiting Friends and Relatives (VFR) trips were slightly the most popular type of travel for overnight trips (over 1408 trips), accounting for over 34% of all overnight travel trips made within a year.
Combining these with Wedding/ Funeral (another form of VFR at 8% - 334 trips) shows that 42% of all overnight trips were for some form of visiting friends and relatives travel.

Leisure travel which includes entertainment, (e.g. cinema, concerts), visit to zoos, visit cultural, historical and heritage sites, eating out, nightlife, beach holidays, wildlife viewing and sports, is the second most popular purpose of visit for overnight trips accounting for 33% (around 1342 trips) of all overnight trips. When combined with Shopping (a form of leisure travel at 4%) generated a total of 37% of all overnight trips.

Business/Conference/professional travel is significant at almost 19% (almost 788 trips). Medical/Wellness trips were significant at over 2% (86 trips) of all overnight trips. Note that Medical/Wellness trips were mainly for medical purposes – very few trips were for wellness (spas, etc.).

**Figure 12-Purpose of Travel for Overnight Trippers**

![Pie chart showing purpose of travel for overnight trips]

*Source: Field Findings*

5.4.3 Description of monthly travel patterns for Leisure and VFR Trippers

The study has revealed that, the favourable months where most of respondents’ travels are between October and December with 41 %, and 33 % of respondents travel between April and June. Also, the study has learnt that the major purposes of these respondents’ travels are leisure 50.9 % and 35.5 % is visiting family and friends.
Over 22% of all trips took place in December and June accounted for 16% of all trips, which are mostly influenced with the school Holidays in June and December and end of year holidays in December.

**Figure 13- Travel Patterns for Leisure and VFR Trippers**

Source: Field Findings
5.4.4. Description of where domestic tourists stay

Staying with friends and relatives was by far the most popular type of accommodation, accounting for almost 29% of all overnight trips. Bed and Breakfast establishments were also significant with almost 23%. Around 17% of all visitors stayed in hotel accommodation and 16% staying in lodges and 15% lived in guesthouses.
5.4.5. Description of mode of transport for Day-trippers

Personal car was by far the most significant mode of transport used by day visitors, accounting for 56% of all-day trips. The use of buses and taxis accounted for the majority of all other trips. Whilst travel by personal car was extremely popular for day trips, a significant proportion of visitors used Taxis (21%) buses (15%), motorcycle/Bajaj (6%), Air (1%) and Train (1%).

**Figure 16- Mode of Transport of Day Trippers**

![Mode of Transport of Day Trippers](image)

*Source: Field Findings*

5.4.6. Description of mode of transport for overnight trippers

Buses were the most popular mode of transport for overnight trips (accounting for 38%), followed by private car (28%), air (16%), Car hire (8%), Train (7%) and motorcycle (3%). Taxis were less popular for overnight trips than they were for taking day trips.
5.4.7 Description of expenditure by Domestic tourists

5.4.7.1 Day Trippers Expenditure

Study has revealed that out of the total budget, day-trippers spend 45% for travel purposes, 35% for engagement in different activities and 20% for food. Also, the study has learnt that for leisure day trips respondents spend an average of TSh 50,000 for travel, TSh 20,000 for food and TSh 40,000 for activities per individual as illustrated in the figure below.
Figure 18- Day Trippers Expenditure

![Pie chart showing expenditure percentages for different activities.]

Source: Field Findings

Table 14 - Day Trip Expenditures

<table>
<thead>
<tr>
<th>Day Trip</th>
<th>Min</th>
<th>Max</th>
<th>Mean</th>
<th>Std. Deviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>How much money do each person spends per trip on average for travel in day trip?</td>
<td>800</td>
<td>400000</td>
<td>52605.88</td>
<td>92317.326</td>
</tr>
<tr>
<td>How much money do each person spends per trip on average for food in day trip?</td>
<td>5000</td>
<td>100000</td>
<td>23606.48</td>
<td>17074.059</td>
</tr>
<tr>
<td>How much money do each person spends per trip on average for activities in day trip?</td>
<td>3000</td>
<td>150000</td>
<td>40145.04</td>
<td>39225.604</td>
</tr>
</tbody>
</table>

Source: Field Findings
5.4.7.2 Expenditure by overnight-trippers

Study has revealed that out of the total budget, overnight-trippers spend 37% for travel purposes, 29% for accommodation, 20% for food, and 14% for engagement in different activities.

**Figure 19 - Overnight Trippers Expenditure**

![Pie chart showing expenditure distribution]

*Source: Field Findings*

**Table 15 - Overnight Trip Expenditures**

<table>
<thead>
<tr>
<th>Night Trip</th>
<th>Min</th>
<th>Max</th>
<th>Mean</th>
<th>Std. Deviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>How much money do each person spends per trip on average for travel in overnight trip?</td>
<td>4000</td>
<td>400000</td>
<td>116390.63</td>
<td>114493.904</td>
</tr>
<tr>
<td>How much money do each person spends per trip on average for food</td>
<td>9000</td>
<td>2500000</td>
<td>90677.69</td>
<td>52029.834</td>
</tr>
<tr>
<td>How much money do each person spends per trip on average for food in overnight trip?</td>
<td>4000</td>
<td>300000</td>
<td>64148.76</td>
<td>85027.217</td>
</tr>
<tr>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>How much money do each person spends per trip on average for activities in overnight trip?</td>
<td>10000</td>
<td>200000</td>
<td>46000.00</td>
<td>61900.922</td>
</tr>
</tbody>
</table>

Source: Field Findings

### 5.5 Description of Wildlife as Tourism product for domestic tourists

From the respondents and focused group discussions, it was indicated that domestic tourism is influenced by interpersonal and Structural constraints. Both indicated that the culture of travel for leisure is not well developed in Tanzania as compared to visiting friends and relatives. Culturally travel for leisure especially for wildlife is not seen as very important. Despite the attractiveness of wildlife as tourism attraction in the country, wildlife as a leisure activity ranked second as most preferred leisure activity by respondents whereas eating out as leisure activity ranked first. One respondent (between 25 and 45 years, male, civil servant) reported,

“I grew up in a pastoralist family where we live with wild animals and do not care about them, what was important is our livestock…I am used to seeing wildlife”

On his part, the private sector association official indicated.

Culture is a major problem; Tanzanians do not admire visiting protected areas. Cost is not an issue for them because TANAPA has established low cost accommodation Banda's within the national

---

4 One respondent, between 25 and 45 years, Male, Civil Servant
parks, which cost from TSH. 30,000 per night, but the same are never full. It is difficult to access this market”

When asked to rank the best five (5) leisure activities for overnight trips according to their preferences, eating out ranked first with 16%, wildlife ranked second with 15%, shopping 14%, beach 13% and theme parks, which includes zoos 13%.

**Figure 20- Ranking of Leisure Activities**

![Bar graph showing various leisure activities and their percentage rankings.](image)

*Source: Field Findings*

Similarly, 34% of the respondents indicated that travel for Leisure which includes wildlife tourism was not seen as important, what was important for them was travelling to visit and connect with other family members which scored 33%. This indicates that family members influence in shaping one’s views and thoughts on participating in domestic tourism. In making a decision on whether to participate on domestic tourism or not, attainment of tangible benefits is regarded as a unit of measure. This constrains travel for leisure.

---

5Executive Secretary, Tanzania Association of Tour Operators.
“….most of us were raised in the villages and we go to town with intentions to make money out there, one has to go back home during the holidays and show parents what you have been working for by helping around with what’s needed or going to the farm checking on your investments and those who help you take care of it”

**Figure 21- Travel Preferences**

![Travel Preferences Chart]

*Source: Field Findings*

### 5.6. Description of Pricing of Tanzania Wildlife Tourism

From the respondents and focused group discussions, it was indicated that domestic tourism is influenced by Structural constraints. On being asked the Pricing of Tanzania Wildlife Tourism, only about 18% and 15% of the sampled respondents, think that Tanzania wildlife tourism is reasonably priced and definitely affordable respectively. 47% and 20% of sampled respondents indicated that Tanzania wildlife tourism is somehow expensive and too expensive respectively. They highlighted that, services in the game parks are designed for individuals with high income, especially foreigners. One respondent indicated: -

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6Senior Economist, Ministry of Natural Resources and Tourism.
“most Tanzanians have limited income therefore... you need to seduce them with cheaper local packages which are currently not available”. ...Although park entrance fees are TSH. 11,800 for most parks ...one needs comfortable accommodation. Notwithstanding the availability of camping as a cheaper alternative, it not suitable because they require a certain level of comfort when on holiday.... if you do not own a 4x4 vehicle you will need to hire one at the price ranging between US$ 250 to 300 per day7.

This means that even though park fees for locals may seem as low as TSH. 11800 per day, this cost does not really capture the cost of the trip nor does it give locals access to national parks. Commenting on the constraints facing domestic tourism in Tanzania, managers of two reputable lodges in Tanzania indicated: -

“Kindly encourage protected areas to promote domestic tourism by allowing discounted rates to local tourists. Never can a local tourist pay same as a foreigner more so to concession fees. This is driving them away”. 8

“One of the biggest obstacles for domestic tourism whether citizen or expert resident is the cost of park fees. Since the increase in park fees and the introduction of a set rate high concession fee, we have noticed a large drop in domestic visitors” 9

Flat rate concession fees (about US$ 59 per night) charged by protected areas to domestic and international tourists irk operators and discourage domestic tourism. The high prices charged could be ascribed to the country’s tourism policy that promotes ‘high-yield, low-volume’ and puts a lot of emphasis on the conservation of natural resources; it is believed that high prices will lead to a low demand and consequently decrease ecological impacts (Beeton & Benfield, 2002 cited in Stone L & Stone T, 2017). However, one can conclude that the policy has resulted in the

7 One Respondent, between 25 and 45 years, Male, Civil Servant
8 Assistant Lodge Manager, Ngorongoro Serena Safari Lodge.
9 Lodge Manager, Ndutu Safari Lodge.
marginalization of a majority of locals and the inclusion of only wealthy locals and foreigners in visiting National Parks.

Figure 22- Pricing of Tanzania Wildlife Tourism

5.6.1 Mapping of Accommodation Prices for Hotels near Wildlife Attractions

Accommodation price mapping in Karatu, which is an area near Ngorongoro Crater, hotel room rates for residents based on single room and double room rates, was conducted. Domestic accommodation rates ranged between $50 and more than $200 for single room and 100 and more than 200 for double rooms as further elaborated bellow.

5.6.1.1 Hotel Single Rooms Prices

From the accommodation price mapping, hotels with affordable rates under 50 USD for single rooms for residents are Hando Coffee Lodge, Kudu Camp and Lodge and Octagon Lodge. The highest hotel rates for single rooms with more than 200 USD charges are Gibbs Farm and Manor Lodge Elewana Collection. Although the indicated resident rates for most hotels outside
Ngorongoro Crater seem to be affordable to most overnight trippers, as indicated in Table 5.4.7.2.1, in order for one to participate in domestic tourism, accommodation is not the only cost area to be considered, there are other cost centres such as transport, activity fees, concession fees, motor vehicle fee, guiding fee, food and park fees (sightseeing). Similarly, inadequate participation into domestic tourism is caused by other factors such as lack of packages, culture and information.

**Figure 23- Hotel Single Rooms Prices in US $**

![Hotel Single Rooms Prices in US $](image)

*Source: Field Finding*

### 5.6.1.2 Hotel Double Rooms Prices

This section maps the double rooms ‘accommodation rates for residents in Karatu, which is one of the sampled areas near wildlife attractions in Tanzania. The hotel with affordable rates under 100 USD for double rooms is Kudu Camp and Lodge. The highest hotel rates for double rooms with more than 200 USD charges are Gibbs Farm, Retreat Lodge Karatu, Plantation Lodge Karatu, and Manor Lodge Elewana Collection.
5.7 Description of Main Sources of Information

Empirical results of the study reveal that family, friends and relatives is still the major source of information to respondents regarding wildlife tourism at 42 %. Radio and TV advertisement are doing well as a source of information at 25 %, although social media and Internet sources, which are the cheapest form of advertisement, are still not effectively utilized.
5.8 Description of Areas that Demand Attention for Domestic Tourists

Empirical findings show that respondents believe that, pricing (39%) and information availability (21%) are the major issues that limit locals to participate in domestic tourism. Other areas that demand attention in promoting domestic tourism include type of attraction available (14%), accommodation (13%) and transportation (13%).
5.9 Description of Level of Information Regarding Tourism Attractions

Respondents attributed their low participation to domestic tourism due to lack of information about tourism activities. 53% of the sampled respondents recorded to have moderate level of information and 46.1% of sampled respondents have low level of information regarding tourist attractions in Tanzania.

<table>
<thead>
<tr>
<th>Level of information regarding tourist attraction</th>
<th>Frequency</th>
<th>%</th>
<th>Cumulative %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Moderate</td>
<td>123</td>
<td>53.9</td>
<td>53.9</td>
</tr>
<tr>
<td>Low</td>
<td>105</td>
<td>46.1</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>228</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

Source: Field Findings

5.10 Description of Level of information regarding tourism service providers

Empirical results of the study show that, the level of information regarding tourism service providers is still unsatisfactory; with 86.8% of sampled respondents have moderate level of information regarding tourism service providers, while 13.2% have low level of information of
tourism service providers. Commenting on the level of domestic tourism awareness, director of one reputable tourism fair indicated:

“Domestic tourism is being promoted in a wrong way; important messages that are required to reach potential domestic tourists are yet to be delivered.”

<table>
<thead>
<tr>
<th>Table 17 - Level of Information Regarding Tourism Service Providers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level of information regarding tourism service providers</td>
</tr>
<tr>
<td>-----------------------------------------------------------</td>
</tr>
<tr>
<td>Moderate</td>
</tr>
<tr>
<td>Low</td>
</tr>
<tr>
<td>Total</td>
</tr>
</tbody>
</table>

*Source: Field Findings*

5.11 Description of Service Providers Tourist Preferences

Study results show that, many service providers in wildlife tourism, focus heavily in foreign tourists and less attention is put to domestic tourists. About 35% put more emphasis on foreign tourists only, 19% focus domestic tourists only and 46% focus on both foreign and domestic tourists. Commenting on the willingness of stakeholders to focus on domestic tourists, two directors indicated:

“Domestic tourism in Tanzania is constrained by culture and budget. Most tour operators see this segment of the market not potential to enable them to survive in the business and that is why more operators focus on international tourists.”

“Most accommodation facilities charge high rates and in US Dollars and also prefer international clientele;”

10 Director, Kilifair Promotions Ltd
11 Director, Kilifair Promotions Ltd.
12 Managing Director, Tanzania Tourist Board
Figure 27- Service Providers Tourists Preferences

Source: Field Findings
CHAPTER SIX

POSSIBLE MECHANISMS TO BOOST DOMESTIC TOURISM GROWTH IN TANZANIA

6.1 Summary of Findings

In this study we have assessed the status of domestic tourism in Tanzania and investigated the respondent’s characteristics, culture and other factors that influence locals to participate in domestic tourism in the country. Summary of the main findings are presented below.

6.1.1 Cost to Participate in Domestic Tourism: Study has revealed that, respondents were in agreement that prices charged at local facilities related to tourism were high. In fact, participation of locals to leisure related activities notably wildlife tourism (Interpersonal constraints) was related to the ‘expensive destination’ perception and the non-availability of cheaper packages, including transport and accommodation for those travelling to these areas. The expensive image of wildlife-based tourism in Tanzania identified as major constraints. Though park entrance fees were deemed low, respondents indicated that these do not reflect the cost of the trip. This creates a financial burden for most domestic visitors.

The study further revealed that about 47 % and 20 % of sample respondents think that Tanzania wildlife tourism is somehow expensive and too expensive respectively. On the other hand, about 18 % and 15 %, think that Tanzania wildlife tourism is reasonably priced and definitely affordable respectively. While this may be a constraint to the domestic visitors, it may be regarded as a deliberate plan to limit the number of tourists through the “high yield – low volume” policy, which is pro-conservation and discourages high inflows of tourists to protected areas. Stone L and Stone T, (2017), found that the high yield – low volume” policy has resulted in the exclusion of low spending tourists who are prohibited by the set requirements of being accompanied by a certified guide, having a set packaged itinerary and high costs.
6.1.2 Culture of Tanzanians (for wildlife tourism): Although culture was observed not to have very significant effect on the participation of respondents to domestic wildlife tourism, increased promotion of the benefits of the tangible products, social responsibility and the focus on livelihoods, have made wildlife tourism as a leisure activity to be regarded not number one priority to respondents. Kruger & Douglas (2015), obtained similar results in South Africa amongst the emerging Black market where it was found that the culture of travel does not exist and the majority within the market seldom go on holiday. The cultural labeling of leisure supports the view that culture influences constraints (Godbey, Crawford & Shen, 2010).

6.1.3 Awareness and information: Lack of information about products was identified as a factor that hinders visitations by domestic tourists. The study has learnt that respondents’ level of information regarding tourist attractions is unsatisfactory with 53% of the sampled respondents recorded to have moderate level of information and 46.1% of sampled respondents have low level of information regarding tourist attractions in Tanzania. This calls for more awareness and education about participation into leisure especially participation into nature-based tourism by locals. Thapa, (2012), noted that, advertising and promotional campaigns are needed to make domestic tourists aware of tourism offerings within the country. Improvement of communication channels to give domestic market more access to information is important.

6.1.4 Domestic Tourism Data Collection Mechanism: Study has also revealed that over 37% overnight trippers travel for leisure related activities within the country. According to UNWTO a domestic tourist is defined as “someone who travels for business or leisure purposes, outside his/her usual environment but within the national borders of his/her “country of residence”, for a minimum of 24 hours. Based on this definition the 37% represents domestic tourist in the country. However, no data on such visitors save for protected areas are available in the country. Based on these findings, it is certain that the number of domestic tourists in the country is more than international tourists. However, this can only be verified if a system to collect data for domestic tourists from the areas outside protected areas is instituted.
6.1.5 More Efforts to Promote Monotonous Tourism Product Offerings: Tanzania tourism is wildlife based and that all the efforts to boost domestic tourism are made towards increasing visitation to wildlife areas. In fact, the notion that there is no domestic tourism in Tanzania is taken from the low number of visitations by the local people to the wildlife protected areas. While a lot of efforts are being done in this area, the study revealed that when respondents were asked to rank the best five (5) leisure activities for overnight trips according to their preferences, eating out ranked first with 16%, wildlife ranked second with 15%, shopping 14%, beach 13% and theme parks, which includes zoos 13%. This means that product diversification is required so as to appeal to different age groups instead of concentrating on wildlife, which is very familiar to the average man on the street due to their upbringing.

Many efforts by both the government and the private sector directed to develop and promote wildlife tourism in the protected areas, which is a product mostly preferred by international tourism market. There are a lot of domestic tourism activities going on in the country, but no one cares about them. People travel for sports, pilgrimages and conferences…. who cares about them? Are they not domestic tourist?

6.2 Recommendations on the Possible Mechanisms to Boost Domestic Tourism in Tanzania

6.2.1: Improve Marketing Strategies for Domestic Tourism: Successful marketing techniques are critical to the development of the domestic tourism industry. During the review of the literature and reports from the respondents it was noted that very little marketing was focused on the domestic tourist. Currently, almost all brochures and information available at the Tanzania Tourism Board and other marketing entities and are geared towards international tourists. Questionnaires and interviews with Tanzania prospective travelers supported the observation that the lack of accessibility to information on domestic tourism is a significant problem within the industry. Interviews with service providers as well as focused group revealed that marketing towards domestic tourism lacks marketing attention. Most service providers focus their marketing

\[\text{________________________} \]

13 Mary Kalikawe, Managing Director, Kiroyera Tours Ltd.
efforts overseas because foreign travelers contribute a larger amount of money and can afford to pay more for services due to international exchange rates. TTB marketing efforts also emphasized more on international markets. In fact, it is only now that Tanzania Tourist Board is now in the process of developing domestic tourism marketing strategy.

By understanding the local Tanzanians’ voice, researchers, policy makers, and planners should now use different channels to develop and diversify tourism products so as to suit local market. The continued growth of Tanzania’s per capita income and middle-class population offer hope for expanding domestic tourism growth; a collaborative approach to domestic tourism marketing is recommended. Tourism and Hospitality operators should come together and formulate domestic tourism marketing strategies that appeal to the local populace. Study has learnt that during the period of January to June the number of foreign tourists in Tanzania tend to decline due to rainy season. Given the fact that about a third of respondents takes vacation during these periods, strategies should focus on promoting domestic tourism during low international tourism seasons.

6.2.2: Government in collaboration with stakeholders to Institute a Mechanism to Facilitate Whole Domestic Tourism Data Collection: Study has also revealed that over 37% overnight trippers travel for leisure related activities within the country. According to UNWTO a tourist is defined as “someone who travels for business or leisure purposes, outside his/her usual environment but within the national borders of his/her “country of residence”, for a minimum of 24 hours. As per this definition, the 37% represents domestic tourists in the country. However, no data on such visitors save for protected areas are available in the country. It is therefore certain that the number of domestic tourists in the country may be more than international tourists. The World Tourism Organization (UNWTO) considers the Household Income / Expenditure Survey (HI/ES) to be the most efficient and suitable instrument for measuring domestic tourist activity.

6.2.3: Encourage Service Providers to Accommodate Domestic Tourists: To produce the most profit from the tourism industry, service providers currently focus marketing and pricing techniques to the foreign market. While prices are affordable to foreign travelers, the cost is much higher than Tanzanians can afford or are willing to pay. With the current prices of accommodations and other tourism commodities, Tanzania travelers are forced to stay with friends and relatives or at other
low-cost accommodations. This situation does not contribute to the economy because less money is being invested in tourism as prices increase and people are less willing to travel. More domestic tourism packages to encourage locals visit attractions and used the available facilities is recommended. Additionally, more accommodation establishments be introduced in the protected areas and awareness of the same to enable people understand the availability of such facilities is recommended.

6.2.4: More Information and Enhanced Travel Facilitation in the Protected areas: Tourism service providers including custodians of protected areas such as TANAPA, TAWA and NCAA should focus their marketing strategies primarily towards improving domestic tourism information, along with ensuring that appropriate information is disseminated to all levels through various media. Protected areas should also ensure domestic tourism travel facilitation including removal or reduced cost for concession fees charged by protected areas to domestic tourists spending a night in the national parks.

6.2.5: Ensure Diversification of Domestic Tourism Products: On Tourism attitudes, the call is for practitioners in the tourism industry in Tanzania to ensure diversification of domestic tourism products so as to appeal to different age groups instead of concentrating on wildlife, which is very familiar to the average man on the street due to their upbringing. In his paper entitled “Our common future “Brundtland (1987), indicates that, domestic tourism faces following problems: First the sector requires immense resources and commitment because most of it involves a lot of development of artificial facilities as opposed to natural attractions and more so a lot of infrastructure and complimentary services have to be developed. Secondly, it needs stronger political leadership to ensure wide participation and consensus building especially when it comes to resource commitment for development activity. Diversification of tourism products is critically important so as to suit various categories of domestic visitors by political/economic status and income, age and sex, as well as encouraging year-round travel.

6.2.6: Carry out a Domestic Tourism Market Survey: The study recommends carrying out a domestic tourism study to determine domestic tourists market needs and preferences so as appropriate measures are taken to boost the sector: The long-term difficulties of the high-yields low- volume
policy adopted by the country and related strategies to implement the same by the custodians of protected areas are recommended to be investigated, specifically to find ways of facilitating domestic tourism in the Protected areas. To this end, the study emphasizes the need to carry out a domestic tourism market survey to determine domestic tourists market needs and preferences so as appropriate measures are taken to boost the sector.

6.2.7: **Carry out Further Research using a larger sample:** This study was partly qualitative and quantitative but was challenged by different factors; therefore, cannot be generalized to the whole population in the country. Although, it provides an in-depth analysis of the assessment of the status of domestic tourism in Tanzania, more generalized results, further research using a larger sample and quantitative data is recommended. Given the growing number of youth population in the country, it is important that this group be targeted more for domestic tourism. The Social Economic Factor of the study recommends the need to carry out a national survey on the status of domestic tourism in Tanzania. This would help inform policy makers at the national level as well as at the county level on where domestic tourism currently stands and how to move the industry forward.
REFERENCES


Kruger E & Douglas A (2015), Constraints to consumption of South Africa’s national parks among the emerging domestic tourism market: University of Pretoria


Tae Y (2007) Leisure Constraints: Multiple Hierarchy Stratification Perspectives


APPENDIX

A. Respondents’ Questionnaire

ASSESSMENT OF THE STATUS OF DOMESTIC TOURISM
IN TANZANIA _____________

Domestic Tourism Survey Questionnaire for Domestic Tourists

Kindly fill out the following questions as precisely as possible and return the same to the one administering this questionnaire or email to philseba@gmail.com. Thank you!

____________________

PART 1: DEMOGRAPHIC INFORMATION

1. Place of Residence: Region.................................... District.................................

2. Place of Origin: city........................................ country.................................

3. Gender of respondent: i) Male ii) Female

4. What is your age?
   - Under 15 years
   - 15-24 years
   - 25-45 years
   - 46-65 years
   - 65 years or above

• Marital status of respondent:
  - (i) Single (never married) (ii) Married
  - (iii) Separated (iv) Divorced
  - (v) Widow/widower (vi) Living together

6. Occupation of respondent:
   - (i) Student (ii) Government Employee (iii) Private Sector Employee
   - (iv) Business-owner (v) Other, Specify..................................................

7. Educational level of respondent:
(i) None (ii) primary education (iii) Secondary education
(iv) Vocational Training (v) University degree
(vi) Others (specify)…………………………………

8. **What is your household income level per year? (in million TSH)** (a) Under 10 (b) 10 – 20 (c) 20 - 30 (d) 30 - 40 (e) 50 and above
9. How many members are in your family (household) and what are their ages?

<table>
<thead>
<tr>
<th>Type</th>
<th>No. of household members</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Child under 15 years</td>
<td></td>
</tr>
<tr>
<td>2. Early youths (15 - 24 years)</td>
<td></td>
</tr>
<tr>
<td>3. Youths (25 - 45 years)</td>
<td></td>
</tr>
<tr>
<td>4. Middle aged (46 – 65 years)</td>
<td></td>
</tr>
<tr>
<td>5. Seniors (65 and above)</td>
<td></td>
</tr>
</tbody>
</table>

**PART 2: VACATION (HOLIDAY) AND DOMESTIC TOURISM**

10. When does your family take a leave? Month(s)…………………………………

11. How many days of leave are you entitled to per year?……………………………

12. Do you and your family normally take vacation during this leave? (a) Yes… (b) No…

13. What is the main purpose of your leave? .
   (a) To visit family    (b) For leisure    (c) For business
   (d) Other, explain …………………………………………………………

14. Where do you normally go during you holiday/leave time? Please include specific locations.
   i. Day trips: (1)…………………………………… (2)…………………………………… (3)……………………………………
   ii. Overnight trips: (1)…………………………………… (2)…………………………………… (3)……………………………………

15. How many people do you take holiday with you and who?

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

16. How much money (in TSH) does each person spends on average per trip during holiday? Please fill in each category.
   i. Day trips
      a) Travel……………………………………………………
      b) Food……………………………………………………
      c) Activities………………………………………………
   ii. Over Night Trips
      a) Travel……………………………………………………
      b) Accommodations……………………………………
      c) Food……………………………………………………
      d) Activities………………………………………………
PART 3: DAY TRIPS AND DOMESTIC TOURISM

This section focuses to acquire information on day trips: these are trips outside of the respondent’s usual environment, where they leave and return within the same day (i.e. do not stay overnight).

17. Kindly rank best five (5) of the following leisure activities for day trips according to your preference (5-Highest preferred to 1- at least preferred).

   i. Entertainment, e.g. cinema, concert, show:......................
   ii. Theme parks, e.g. aquariums, zoo:......................
   iii. Cultural historical and heritage, e.g. cultural village, museums, art gallery, township tour:..............
   iv. Eating out, e.g. restaurants, cafes:......................
   v. Nightlife, e.g. bars, night-clubs, discos, casinos:......................
   vi. Shopping, e.g. malls, flea/craft markets:......................
   vii. Beach, e.g. sunbathing and swimming:......................
   viii. Wildlife, e.g. National parks, game viewing:......................
   ix. Sports, e.g. individual sports, spectator:......................
   x. Other, (Specify):...........................................

18. Kindly mention the total number of day trips you have made within the country for the past 12 months in each trip category.

<table>
<thead>
<tr>
<th>Trip Purpose</th>
<th>December</th>
<th>January</th>
<th>February</th>
<th>March</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leisure</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shopping- Business</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shopping-Personal</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sporting- Spectator</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visiting friends, family and/or relatives</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Funeral</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business/professional trip</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
19. Kindly mention the number of times the main mode of transportation to destination was used in your day trips for the past 4 months and their associated costs (in TSH per person).

<table>
<thead>
<tr>
<th>Trip Purpose</th>
<th>Air</th>
<th>Bus</th>
<th>Car</th>
<th>Motorcycle</th>
<th>Taxi</th>
<th>Train</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leisure</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shopping- Business</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shopping-Personal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sporting- Spectator</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>VFR (Visiting friends, family and/or relatives)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Funeral</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business/professional trip</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business conference</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Study educational trip</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wellness (spa, health farm)</td>
<td></td>
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<tr>
<td>Other, (Specify).</td>
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</tbody>
</table>

Cost per Trip (in TSH)
PART 4: OVER NIGHT TRIPS AND DOMESTIC TOURISM

This section focuses to acquire information about over-night trips: these are trips outside of the respondent’s usual environment where one night or more is spent away from the household.

20. Kindly rank best five (5) out of the following leisure activities for over night trips according to your preference (5-Highest preferred to1- at least preferred).
   i. Entertainment, e.g. cinema, concert, show:......................
   ii. Theme parks, e.g. aquariums, zoo:......................
   iii. Cultural historical and heritage, e.g. cultural village, museums, art gallery:.............
   iv. Eating out, e.g. restaurants, cafes:......................
   v. Nightlife, e.g. bars, night-clubs, discos, casinos:......................
   vi. Shopping, e.g. malls, flea/craft markets:......................
   vii. Beach, e.g. swimming:.................................
   viii. Wildlife, e.g. National parks, game viewing:......................
   ix. Sports, e.g. individual sports, spectator:......................
   x. Other, (specify)........................................

21. Kindly mention the total number of over night’s trips you have made within the country for the past 12 months in each trip category.

<table>
<thead>
<tr>
<th>Trip Purpose</th>
<th>December</th>
<th>January</th>
<th>February</th>
<th>March</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leisure</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shopping- Business</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Shopping-Personal</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sporting- Spectator</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visiting friends, family and/or relatives</td>
<td></td>
<td></td>
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<tr>
<td>Funeral</td>
<td></td>
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</tr>
</tbody>
</table>
### Trip Purpose

<table>
<thead>
<tr>
<th>Trip Purpose</th>
<th>Air</th>
<th>Bus</th>
<th>Car</th>
<th>Motorcycle</th>
<th>Taxi</th>
<th>Train</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leisure</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Shopping- Business</td>
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</tr>
<tr>
<td>Shopping-Personal</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Sporting- Spectator</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>VFR (Visiting friends, family and/or relatives)</td>
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<td></td>
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<tr>
<td>Funeral</td>
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<tr>
<td>Business/professional trip</td>
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<tr>
<td>Business conference</td>
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<tr>
<td>Study educational trip</td>
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<tr>
<td>Medical</td>
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<tr>
<td>Wellness (spa, health farm)</td>
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<tr>
<td>Other, (Specify)</td>
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</tbody>
</table>

### Cost per Trip (in TSH)

22. Kindly mention the number of times the main mode of transportation to destination was used in your over-night trips for the past 12 months and their associated costs (in TSH per person).
23. Kindly mention the total number of nights spent in each given accommodation in your over-night trips for the past 12 months and their associated costs (in TSH per person).

<table>
<thead>
<tr>
<th>Trip Purpose</th>
<th>Hotel</th>
<th>House Guest</th>
<th>Breakfast Bed</th>
<th>Lodge</th>
<th>with Stayed</th>
<th>Camping</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leisure</td>
<td></td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>Shopping- Business</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Shopping-Personal</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Sporting- Spectator</td>
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<tr>
<td>VFR (Visiting friends, family and/or relatives)</td>
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<tr>
<td>Funeral</td>
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<tr>
<td>Business/professional trip</td>
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</tr>
<tr>
<td>Business conference</td>
<td></td>
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<tr>
<td>Study educational trip</td>
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<tr>
<td>Medical</td>
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<tr>
<td>Other (Specify)…………</td>
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<tr>
<td><strong>Average Cost per Night (in TSH)</strong></td>
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</tr>
</tbody>
</table>
24. Kindly mention at least 3 destinations within Tanzania you would like to visit (or visit again) from your best five leisure activities in the near future.

<table>
<thead>
<tr>
<th>Leisure Activities</th>
<th>Destinations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entertainment, e.g. cinema, concert, show.</td>
<td></td>
</tr>
<tr>
<td>Theme parks, e.g. aquariums, zoo.</td>
<td></td>
</tr>
<tr>
<td>Cultural historical and heritage, e.g. cultural village, museums, art gallery, township tour.</td>
<td></td>
</tr>
<tr>
<td>Eating out, e.g. restaurants, café.</td>
<td></td>
</tr>
<tr>
<td>Nightlife, e.g. bars, night-clubs, discos, casinos.</td>
<td></td>
</tr>
<tr>
<td>Shopping, e.g. malls, flea/craft markets.</td>
<td></td>
</tr>
<tr>
<td>Beach, e.g. sunbathing and swimming.</td>
<td></td>
</tr>
<tr>
<td>Wildlife, e.g. National parks, game viewing.</td>
<td></td>
</tr>
<tr>
<td>Sports, e.g. individual sports, spectator.</td>
<td></td>
</tr>
<tr>
<td>Other, (Specify):.................................</td>
<td></td>
</tr>
</tbody>
</table>
25. Kindly state the maximum amount that you are willing to spend from your best five leisure activities below (excluding transport and accommodation costs).

<table>
<thead>
<tr>
<th>Leisure Activities</th>
<th>Amount Spent in Activities (in TSH)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entertainment, e.g. cinema, concert, show.</td>
<td></td>
</tr>
<tr>
<td>Theme parks, e.g. aquariums, zoo.</td>
<td></td>
</tr>
<tr>
<td>Cultural historical and heritage, e.g. cultural village, museums, art gallery,</td>
<td></td>
</tr>
<tr>
<td>township tour.</td>
<td></td>
</tr>
<tr>
<td>Eating out, e.g. restaurants, café.</td>
<td></td>
</tr>
<tr>
<td>Nightlife, e.g. bars, night-clubs, discos, casinos.</td>
<td></td>
</tr>
<tr>
<td>Shopping, e.g. malls, flea/craft markets.</td>
<td></td>
</tr>
<tr>
<td>Beach, e.g. sunbathing and swimming.</td>
<td></td>
</tr>
<tr>
<td>Wildlife, e.g. National parks, game viewing.</td>
<td></td>
</tr>
<tr>
<td>Sports, e.g. individual sports, spectator.</td>
<td></td>
</tr>
<tr>
<td>Other, (Specify):.................................</td>
<td></td>
</tr>
</tbody>
</table>
26. **What do you think about the cost of tourism services in Tanzania?**
   (a) Too expensive  (b) Reasonably priced  (c) Definitely affordable
   (d) Other. Please explain………………………………………………

27. **What area of tourism would you like to see improved?**
   (a) Transportation (b) Pricing
   (c) Accommodations  (d) Accessibility
   (e) Types of Attractions Available
   (f) Other. Please explain………………………………………………

*Other Comments*

*Thank you for your time and participation!*
B. Service Providers' Questionnaire

ASSESSMENT OF THE STATUS OF DOMESTIC TOURISM IN TANZANIA

Domestic Tourism Survey Questionnaire for Service Providers

Definition of Domestic Tourism: Any travel within one’s home country. This can include visiting attractions such as National Parks (e.g. Serengeti, Mikumi etc.) museums, Beaches and historical sites, community-based tourism enterprises, cultural experiences, etc.

Kindly fill out the following questions as precisely as possible and return the same to the one administering this questionnaire or email to philseba@gmail.com. Thank you!

PART 1: GENERAL INFORMATION

• Name of the institution/company
• Region District
• Your position
• Size of your institution/company
  Small
  Medium
  Large
• Number of people employed
  Less than 10
  Less than 50
  Less than 100
  More than 100

PART 2: TOURISM SERVICES

• What types of services do you offer?

• What are the costs for each service you provide?
(ii) Do you feel the costs of your services are within a reasonable range for domestic tourists?
   Yes
   No

(iii) Who usually takes advantage of your services?
   Domestic Tourists
   Foreign Tourists

(iv) Do you have a preference between domestic and foreign tourists?
   Domestic Tourists
   Foreign Tourists

(v) Do you have a guest book or any other means to identify your usual customers?
   (i) Yes   (ii) No

(iv) When is the busiest season for you? Specify…………………………….

(v) Do you have an off-season, When? Specify………………………………

(vi) Do you have a pricing structure to accommodate domestic tourists?
   Yes
   No

(vii) IF NO: Would you be willing to implement one?
   (i) Yes   (ii) No

(vi) IF YES: What would that entail?
   Specific price ranges
   Discounts
   Other, Specify…………………………………………………………

Who do you try to attract to your business and why?

<p>| | |</p>
<table>
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<tbody>
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<tr>
<td>3</td>
<td></td>
</tr>
<tr>
<td>4</td>
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</tbody>
</table>
(ii) How do you do this and why?

<p>| | |</p>
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</thead>
<tbody>
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<tr>
<td>3</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>

(iii) Do you have any way to measure the success of your marketing strategy?
   i. Yes    ii. No

(v) What is the main draw to your company? (Motto/logo)

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

(vi) What image do you try to project for your services?

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

(vii) What method do you think have helped you most in establishing a successful business?
   i. Marketing
   ii. Branding
   iii. Hiring local guides
   iv. Location
   v. Pricing
   vi. Other, Specify............................................................................................

(ii) What do you think about the cost of tourism services to domestic tourists?

   (a) Too expensive  (b) Reasonably priced  (c) Definitely affordable

   (v) Other. Please explain..........................................................................

Thank you for your time and participation!
C: Questionnaire for TANAPA, NGORONGORO CONSERVATION AREA AND TAWA-WMA

(Please tick. answer/comment as appropriate)

(1) Name______________________________________________________
(2) Designation_________________________________________________
(3) Institution___________________________________________________
(4) What is the average number of tourists visiting your area per year? (a) Local_____________ (b) Foreign________________
(5) Do you offer any facilities and services to the local tourists visiting the park/reserve/conservation area, WMA? Yes [ ] No [ ]. If yes, state which ones in particular____________________________________________________
(6) If accommodation is offered, what do you charge for the local tourists per day? TSH.___________________________________________________
(7) What other charges are required to be paid by domestic tourists in your area (specify) TSH.___________________________________________________
(8) Do you experience any problems in offering services for domestic tourists? Yes [ ] No. [ ] If yes, identify the problems____________________________________________________
____________________________________________________
____________________________________________________
(9) What has been the trend of tourists visiting your area for the last five years?

<table>
<thead>
<tr>
<th>Year</th>
<th>Local tourists</th>
<th>Foreign tourists</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>_____________</td>
<td>_____________</td>
</tr>
<tr>
<td>2014</td>
<td>_____________</td>
<td>_____________</td>
</tr>
<tr>
<td>2015</td>
<td>_____________</td>
<td>_____________</td>
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<tr>
<td>2016</td>
<td>_____________</td>
<td>_____________</td>
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<tr>
<td>2017</td>
<td>_____________</td>
<td>_____________</td>
</tr>
</tbody>
</table>

(10) What means of transport do the local tourists use to travel to your area? (a) Own transport (b) Hired Tour Vehicles (c) Hired mini Buses (d) other, specify

11) What measures are you taking to promote domestic tourism, especially in your area?

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

(12) What has been the results/ expected results of these measures?

________________________________________________________________________________________

________________________________________________________________________________________

(13) What suggestions can you offer to improve domestic tourism in your area?

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

Thank you for your participation and cooperation.