

**DEVELOPMENT AND FUTURE OF TOURISM IN THE SOUTHERN CIRCUIT IN
TANZANIA**

**AN OVERVIEW OF TOURISM DEVELOPMENT IN THE
SOUTHERN CIRCUIT**

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PERFORMANCE OF TOURISM INDUSTRY IN TANZANIA

Tourism Receipts -increased from US\$ 259.44 million in 1995 to US \$ 746.02 million in 2004

Tourist Arrivals -number increased from 295,312 in 1995 to 582,807 in 2004

TSA estimates - economic impact of tourism to the national economy is estimated at US \$ 1,858.4 million for the year 2005 and US at expected to reach US\$ 3,699.4 million by 2015 (WTTC, 2005)

Accounts for nearly 16% of the Nation's GDP

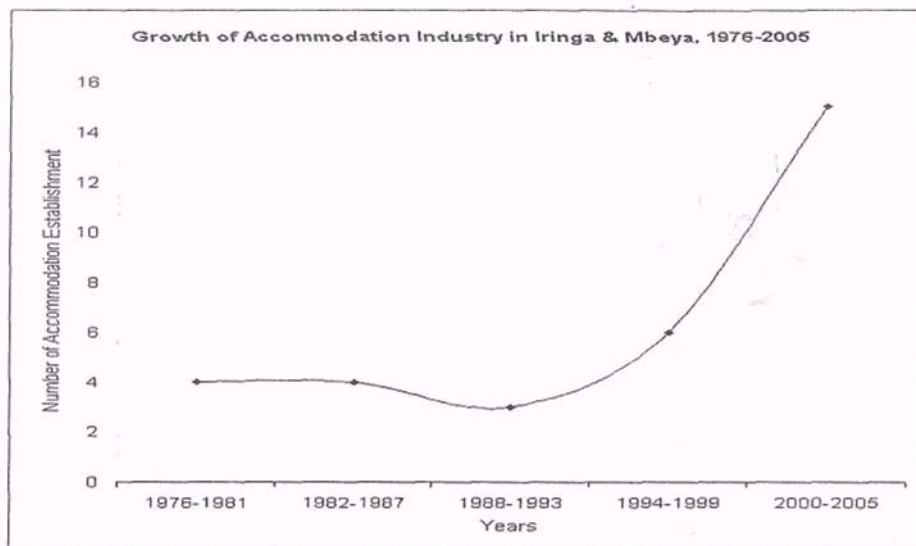
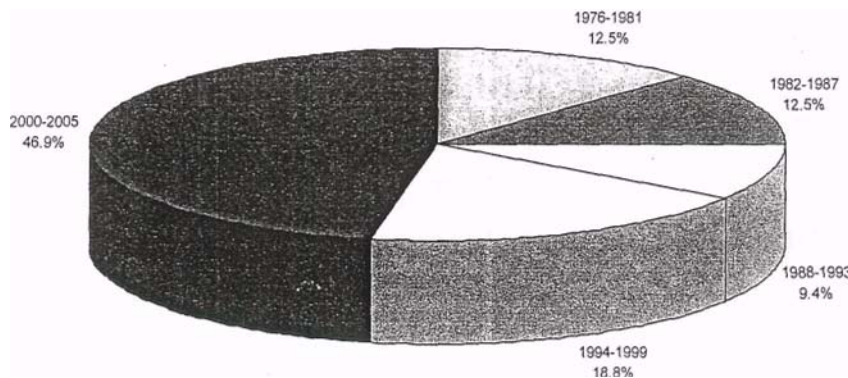
Supports around 198,557 direct jobs

TOURISM GROWTH IN THE SOUTHERN CIRCUIT

Expansion of the Tourism Sub-sectors:

Between 2000 and 2005 accommodation establishments for Iringa and Mbeya have increased by 46.9% compared to an average of 10% growth in the previous years.

Growth of Accommodation Industry in Iringa & Mbeya, 1976-2005



Source: Ministry of Natural Resources and Tourism

Number of Visitors:

Visitors to the National Parks in SC have increased considerably in the last 5 years (from 1999 to 2004): Mikumi NP from 10,986 to 19,287; Katavi NP from 368 to 1,247; Ruaha NP from 5,274 to 11,482 and Udzungwa NP from 483 to 1,983

Number of visitors to Marine Parks and Reserves increased from 6,124 in 2000 to 19,102 in 2004.

Tourism enterprises in the region that are registered by TIC between 1990 to June 2005 are as follows:

Dar es Salaam-267, Pwani-32; Morogoro-19; Mbeya-4; Mtwara-6, Lindi-4, Ruvuma-2 and Rukwa-0

TOURIST CIRCUITS IN TANZANIA

A concept "Tourist Circuit" denotes a framework within which the different attractions or a number of sub circuits could be developed and linked together based on factors such as accessibility, facilities, supply of resources and products etc

There are two major circuits in the country, the Northern Circuit and a Southern Circuit, each with its own distinctive attractions

I: Northern Circuit:

This stretches from Lake Victoria in the west to Tanga in the east and comprises of three separate zones/groups of tourism assets:

1. The Serengeti, Lake Manyara National Parks and Tarangire National Parks and the Ngorongoro Conservation Area (including Olduvai Gorge).
2. The Kilimanjaro and Arusha National Parks
3. Usambara Mountains, Mkomazi Game Reserve and the coastal area including Tanga, Amboni Caves, Pangani and the Pemba Channel.

II: Southern circuit (SC):

The Circuit comprises of:

1. **Wildlife/Adventure Trail**-the Selous GR, Mikumi NP in north and Udzungwa NP in the west. Ruaha NP and Rungwa GR.
2. **Coastal Heritage Trail**-including Bagamoyo, Kilwa (a great trading centre). Mafia Island (the early Swahili settlements) and Dar-es-Salaam

The likely sub-circuits in this circuit are Iringa (with Udzungwa and Ruaha); Mikuni/Selous; and Mafia/ Kilwa/ Selous.

III: Western Circuit - still underdeveloped, mainly due to access constraints.

THE 10 TOURISM DEVELOPMENT ZONES OF TANZANIA

1. Northern Wildlife Area: National Parks of Serengeti, Lake Manyara, Tarangire, and NCAA
2. Kilimanjaro-Arusha: Kilimanjaro and Arusha NPs and Gateway Service Centres
3. North East Mountains & Coast: arc through Mkomazi NPs, Usambara Mountains and North Coast to including Tanga and Pangani.
4. Coastal: 'from Saadani NP in the North (including Bagamoyo), and from Ras Kimbiji to the Rufiji Delta in the South.
5. Dar-es-Salaam and Environs: Urban Waterfront North to Ras Kimbiji in the South, and Islands of Mbudya, Bongoyo, Panganvini, Mwaktumbe, Kendwa and Sinda
6. Southern Coast and Islands: from Southern Coastal Zone Boundary to Mozambique border including Kilwa, Mtwara , Mafia and Songo Songo
7. Southern Wildlife: Mikumi, Udzungwa and Ruaha NPs, and Selous, Rungwa GRs.
8. Southern Highlands: Poroto and Livingstone Mountains Ranges of Lake Nyasa
9. Lake Tanganyika: Gombe, Katavi and Mahale Mountain NPs.
10. Lake Victoria Hinterland: Rubondo National Park and Biharamulo-Bunringi, Orungodu and Rumanyika GRs

THE SIX PRIORITY TOURISM DEVELOPMENT ZONES

(Priorities 3, 4 and 5 are in the Southern Circuit)

1. Enhance and diversify Northern Wildlife Area (NWA).
2. Extend the NWA eastwards into Usambara Mountains, Mkomazi and north coast arc.
3. Develop a strong Southern Circuit.
4. Develop Coastal Zones involving beach resort tourism in offshore islands; and the historical centres of Bagamoyo, the Saadani National Park and Kilwa to the South.
5. Enhance Dar-es-Salaam's and environs-urban waterfront and the offshore islands.
6. Develop Corridor to link the Northern and Southern Areas.

CURRENT INTERVENTIONS AND INITIATIVES

Conservation of Kilwa Historical Sites (under Governments of France, Japan, Norway and UNESCO). Kisiwani and Songo Mnara have already been renovated; further support on Sanje ya Kati ruins.

Slave Route (Caravan Route), from Bagamoyo to Kigoma for proper documentation of the route - SIDA support

Preparation of the Historical and Cultural Heritage Conservation Guidelines

Road infrastructure development in Selous GR (ADB support)

Destination Tanzania approved by source markets e.g. China

Construction of the new National College of Tourism-Government of France support

Investor support programme- World Bank/MIGA

Joint Marketing under East African Community initiative

Support to TCT - Private-Public Partnership

INVESTMENT PROMOTION INITIATIVES

Investment Incentives - TIC

The First Tourism Investment Forum in Arusha, 2002, which led re-opening of Kilimanjaro Hotel in Dar es Salaam. Subsequent forums were organized / attended in various regions and in other countries

SUPPORTING INSTRUMENTS

National Tourism Policy: identify supportive measures for the development of competitive, profitable and sustainable tourism industry o Integrated Tourism

Master Plan: implement priorities put forward in the National Tourism Policy.

Tourism Legislation: the New Draft Bill being prepared to facilitate operation

Tourism Development Framework for the Southern Circuit:- the document outlines development opportunities in the circuit

The National Tourism Development Programme: is being prepared,

Investment Guidelines, General Management Plans: for Marine Parks and Reserves are in place.

Ten Year Road Sector Development Programme -prioritizing areas and roads for construction during the next ten years.

Hotel Classification: exercise is underway which is expected to improve service standards in the tourism sector in the country.

An on-going exercise of identifying tourist attractions and areas for development in the regions

INFRASTRUCTURE DEVELOPMENT

A. Roads:

Completed Trunk Roads, bridges and ferries projects:

1. Dar es Salaam- Mlandizi road (55 km)
2. Chalinze- Morogoro - Melela road (129 km)
3. Mikumi - Kidatu road (36 km)
4. Kitonga Gorge (7.6 km)
5. Somanga- Masaniga/Matandu road (33 km)
6. Dar es Salaam- Mkuranga road (60 km)
7. Kasumulu- Ibanda - Uyole road (103 km)
8. Mkapa Bridge and road approaches (13.9 km)
9. Rehabilitation of 11 bridges along TANZAM Highway
10. Procurement of a new ferry across Kilombero river

Ongoing Trunk Roads and Bridges Projects- to be completed by 2005

1. Nangurukuru - Mbwemkulu road (95 km):
2. Mbwemkulu - Lindi-Mingoyo road (95 km):
3. Ndundu - Somanga road (60 km) is at design stage.
4. Songwe - Tunduma road (70 km):
5. Dar es Salaam - Kibiti road (39 km):
6. Masasi -Tunduru road (190 km): Detailed Design and Civil works to commence this Financial Year 2005/06.

5 Trunk Road Projects requiring funds:

Kibiti - Ikwiri road (29 km): Matandu- Nangurukuru road (10 km):Mtwara - Mingoyo- Masasi - Songea - Mbamba Bay road (633 km): Unity Bridge -Tanzania and Mozambique: Sumbawanga- Tunduma road (230 km):

More funds required to rehabilitate and maintain regional roads and bridges so as to link them with trunk roads and ease access to various attractions

B. Airports Development in the Southern Circuit

Except for Mtwara Airport where daily scheduled flights operate, other airports are served by charter

Region	Airports	Development Plans
LINDI	LINDI	Terminal Building Rehabilitation Completed, generator to be installed
	Nachingwea	
	Kilwa Masoko	
MTWARA	Mtwara	Construction of a new terminal building and rehabilitation of apron
	Masasi	
	Liwale	
MBEYA	MBEYA	Construction of a new (Songwe) airport in progress
	Chunya	
	Mbalizi	
RUVUMA	Songea	
	Manda	
	Tunduru	
	Liuli	
	Mbamba Bay	

Source: TAA-September 2005

OPPORTUNITIES FOR DEVELOPMENT/INVESTMENT

Facilities and attractions in Dar es Salaam and environs

Facilities and attractions in other centres-Iringa, Mbeya, Mtwara, Lindi, Rukwa

facilities and services in Heritage sites e.g. in Kilwa, National Parks and Reserves- Selous, Ruaha, Mikumi, Udzungwa,

Beach/Resort tourism along coastal trail.

Tour operation, Transport and Infrastructure

Combining wildlife with beach resorts in Bagamoyo, Mafia Island and on the coastal strip south of Dar-es-Salaam.

Excursions along coastal frontage, from Bagamoyo to Saadani or between Bagamoyo and Zanzibar, and Bagamoyo and Dar-es-Salaam.

Linking Mafia Island to the Rufiji Delta. Tours along the Rufiji River into the Selous.
Waterfront development in Dar-es-Salaam and Revitalization of Dar es salaam as the gateway to the SC

CHALLENGES AND WAY FORWARD

The potential is yet to be fully exploited:

Develop high-value services and an integrated tourism product

Improve regional and international linkages.

Infrastructure development -Roads, communication, power etc

Human Resource

Sources of finance for investment and development

Search for new markets

More involvement of the local communities,

Develop Tourism Action plan for focal points

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