

**SUSTAINABILITY CHALLENGES FACE TOUR OPERATIONS AND
TOURIST GUIDING SERVICES IN ZANZIBAR**

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**A DISSERTATION SUBMITTED IN PARTIAL FULFILLMENT OF THE
REQUIREMENTS FOR THE DEGREE OF MASTER OF PROJECT
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CERTIFICATION

The undersigned certifies that, he has read and hereby recommends for acceptance by the Open University of Tanzania a dissertation titled: ***“Sustainability Challenges Face Tour Operations and Tourist Guiding Services in Zanzibar”*** in partial fulfillment of the requirements for the Degree of Master of Project Planning and Management of the Open University of Tanzania.

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I, **Said A. Malengo**, do hereby declare that this dissertation is my own original work and that it has not been presented and will not be presented to any other university for a similar or any other degree award.

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.....

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DEDICATION

I dedicate my dissertation work to my family and many friends. A special feeling of gratitude to my loving mother Time, her words of encouragement and push for tenacity ring in my ears. My sisters and brothers have never left my side and are very special. I dedicate this work and give special thanks to my wife and children for being there for me throughout the entire program. All of you have been my best cheerleaders.

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ABSTRACT

The study aimed at assessing challenges facing tour operation and tour guiding in Zanzibar, Tanzania. In specific, the study determined social, economic and environmental challenges facing the sustainability of tour operators and tour guides. A cross sectional study design was adopted. The Zanzibar Stone Town was selected for the study where a sample of 134 respondents was selected by using simple random sampling and purposive sampling. Structured questionnaire and interview methods were used for data collection. Descriptive statistics and logistic regression was used to analyze quantitative data. Content analysis was used for qualitative data from interview. The findings show that crimes, unqualified staffs, and destruction of traditional culture are social challenges facing tour operation and guiding. Economic challenges are poor infrastructures and inability to innovate. The environmental challenges identified are poor health safety, damage of ecosystem and climate change. The study recommends that government, tour companies and community are supposed to work in collaboration to make sure that social, economic and environmental challenges facing tour guiding and tour operations are effectively addressed.

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LIST OF ABBREVIATIONS

AIDS	Acquired Immunodeficiency Syndrome
GDP	Gross Domestic Product
IMF	International Monetary Fund
MKUZA	Mkakati wa Kukuza Uchumi Zanzibar
SPSS	Statistical Package for the Social Sciences
SSA	Sub-Saharan Africa
WTO	World Trade Organization
WTTC	World Travel and Tour Companies
ZCT	Zanzibar Commission for Tourism

CHAPTER ONE

INTRODUCTION

1.1 Background to the Study

Tourism is one of the basic economic sectors in Tanzania and the World in general. It has become the biggest economic activity in the world today, many tourists every year travel from one place to another for their holidays. Because of their expenditures tourism increases income to the government, tour companies, travel agents, tour guides and natives who engage with tourist activities to the destination. According WTO (2016) International tourism represents 7% of worldwide exports Expenditure by international visitors on accommodation, food and drink, entertainment, shopping and other services and goods in the destinations reached US\$ 1260 billion (euro 1136 billion) in 2015. In Tanzania tourism has developed due to the existence of attractions like national parks, game reserves, mountains, beaches, historical sites and traditions.

Number of tourists increased annual as reported that Tanzania hosted at least 1,284,279 tourists in 2016, compared to 1,137,156 in 2015, which was an increase of 12 percent, Nziku (2017). Tanzania national income on tourism sector is growing due to the large number of tourists. This explained by Permanent Secretary of Ministry of Natural Resources and Tourism in 2017 reported that the tourism industry have been increasing year after year with 2.1 billion U.S. dollars in 2016 against 1.9 billion U.S. dollars in 2015.

Before independence there were Tanganyika and Zanzibar as independent countries, Tanganyika was under German colonial rule from 1885 until after the World War 1 in

1919 whereby British became new colonial rule until December 1961. Zanzibar was under British Protectorate from 1890 until 1963 and in January 1964 Indigenous Africans took the full power. During colonial era tourism was regulated under colonialists. Kazuzuru, (2014) After the formal and effective colonization of Africa, tourism activities began to be handled and formally organized by the colonial governments.

In Zanzibar after independence tourism sector changed according to the time and needs of the government. ZRG (2014) after independence tourism took new direction and changed its organization structure into Tourism Information Bureau in 1964 and to Tanzania Friendship Tourist Bureau in 1965. In 1980's it changed its focus to economic sector. In 1983 due to the changes of the economy Zanzibar adopted Structural Adjustment Program under International Monetary Fund (IMF) and World Bank, UN-WTO advised the government on tourism sector. This resulted change of structure into Zanzibar Tourist Corporation in 1985 where it was the time of economic liberalization policy in Tanzania.

In 1996 there was a formation of Zanzibar Commission for Tourism under the Tourism Act No.9 of 1996. Tourism is not a union matter in the United Republic of Tanzania. Zanzibar Government vision of 2020, MKUZA, and Zanzibar Growth Strategy identified tourism as among the basic economic sector to achieve. The Revolutionary Government of Zanzibar depends on this sector as a basic for the economic growth -Zanzibar President Dr. Ali Mohamed Shein said “tourism is the leading economic wheel for the island, with new hopes to see more tourists calling here for holidays.”

Tourist industry in Zanzibar has developed as Tanzania mainland, large number of tourism visit every year because they get chance to experience exotic beaches, historical sites, stone town as World heritage as declared by UNESCO, and traditional culture of the natives. This is fluctuating and rapid growth rate of national income. Nziku (2016) said in Zanzibar revenue from tourism increased by 30.4 percent to 3.8 billion U.S. dollars in 2016 from 2.9 billion U.S. dollars earned in 2015.

Apart from this government's interest, in this sector still faces challenges in the field of tour operation and guiding services, which are the ones of the fundamental aspect for tourism development. Most of tour operators in Zanzibar are dormant and others are dead. This may affect the vision of government regarding the development through tourism industry. Tour operators are important because the government collects revenue from them, they create job opportunities to the residents and also they help to ensure good services and security to tourists whereby this industry can be valued from them (RGZ, 2004). There some problems face tourism sector in both Tanzania mainland and Zanzibar like low capital investment, destruction of traditional culture, low income and innovative, small number of local experts on tourism activities as expalained by Tairo (2017) The tourism industry in both Tanzania mainland and Zanzibar has been depending on foreign skilled workers. There are about 3,500 trained skilled workers in hotels, transport and ticket booking companies in Tanzania, mostly in managerial posts.

The study intended to explore challenges affecting sustainability of tour operations and tour guiding services in Zanzibar on economic, social and environmental aspects. This will help these two fundamental organs with other stakeholders of tourism to take

measures to eradicate those challenges so as to develop for their benefits and the nation general.

1.2 Statement of the Problem

Zanzibar Tourism Policy of 2004 intends to enhance the country future tourism development with sustainability, quality and diversification as the most important factors. Zanzibar's environmental, cultural and landscape qualities constitute its greatest resource for the future with regard to its economic development and the quality of life of its people (RGZ, 2004).

The policy puts forward that the factor of sustainability is concerned not only as a rich gift which should be preserved for the future but also as the extraordinary driving force for its people's environmental, economic, social and cultural development (RGZ, 2004). On the other hand, sustainability of tourism sector can significantly contribute to the sustainability of tour operation and tour guiding services in Zanzibar since apart from other factors the two aspects depend much on sustainable tourism industry. Tour guides and tour operators should have sustainable economic basis to effectively run tourist activities.

However, they must retain the nature of the environment including cultural sites and other kinds of tourist attractions. Despite the fact that tour operators and tour guides significantly contribute to the national revenue, their activities must also be socially and culturally acceptable. Complying with environmental, social, economic and cultural aspects will ensure a long term sustainability of tour guides and tour operation programs in Zanzibar, and hence will ensure progressive national revenues. Therefore

it is the target of the proposed study to explore challenges facing sustainability of tour operation and tour guiding services in Zanzibar to prove how the Zanzibar Tourism Policy of 2004 is achieved in terms of sustainability for tour operators and tour guiding services in Zanzibar.

1.3 General Objective

The general objective of the study was to explore sustainability challenges facing tour operations and tourist guiding services in Zanzibar, Tanzania.

1.3.1 Specific Objectives

Specifically, the study intended to:

- (i) Determine economic challenges facing tour operation and tour guiding services.
- (ii) Identify social challenges facing tour operation and tour guiding
- (iii) Assess environmental challenges facing tour operation and tour guiding.

1.4 Significance of the Study

The study findings will influence the tour operations and tourist guiding services development with respect to the modes of delivery and assessment of their services. It may be argued that some of stakeholders of the tourism industry are lacking relevant knowledge regarding the aspects which may challenge their tourism. The study findings will influence a change in approaches operation so as to make these sectors acceptable, reliable and cope with global changes.

The study findings are also expected to contribute to philosophical thinking on how problems hinder tour operation and guides in Tanzania, Zanzibar in particular. This

will help to take various effective measures to overcome problems facing tour operation and tour guiding services. The findings will enhance the use of effective measures for the development of these tourism services.

Also it will help service providers in tourism sectors to know the role and positions of tour operations and tourist guiding services in the development of this business. While the government with other authorized organs like Zanzibar Commission for Tourism, Zanzibar Association of Tour Operators (ZATO), Zanzibar Investment Promotion Authority (ZIPA), Zanzibar Association of Tourist Investors (ZATI), District Councils and others also will learn about the challenges facing tour operation and guides as well as the role and importance of these aspects in the survival of tourism sector. The findings will enhance the use of effective measures for the development of tour operators and tour guides in Zanzibar.

CHAPTER TWO

LITERATURE REVIEW

2.1 Overview

The chapter presents the review of related areas on tour operators and guides in tourism industry. It begins to elaborate about theoretical literature review regarding tour operations and guides. Also, it explains about empirical literature review related to tour operations and tour guiding.

2.2 Definition of Key terms

2.2.1 Tourism

Different definitions are provided by authors. However, they are closely related. Brian and Chris (2005) “the activities of person travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes” (pg 17). On the other hand, Christopher (2009) defined tourism as the movement of the people away from their normal places of residency. Macintosh and Goeldner (1986) defined tourism as the sum of the phenomena and relationship arising from the interactions of tourists, business suppliers, host governments and host communities in the process of attracting and hosting these tourists and other visitors.

All of the above definitions, however, run short of the real meaning of tourism as it is being practiced today. It being the system $\text{Tourism} = \text{Tour} + \text{ism}$ is just like other words/subjects ending in a syllabus “*ism*” in the likes of: $\text{Commun} + \text{ism} = \text{Communism}$; $\text{Federal} + \text{ism} = \text{Federalism}$; $\text{Marx} + \text{ism} = \text{Marxism}$; $\text{Feudal} + \text{ism} = \text{Feudalism}$; $\text{Social} + \text{ism} = \text{Socialism}$; $\text{Shinto} + \text{ism} = \text{Shintoism}$; $\text{Buddha} + \text{ism}$

=*Buddhism*; and, Capital+*ism*= *Capitalism* as explained by Baure,L(1983), All these words and all such others similarly situated connote of something that has to do with the systems in governance, religious beliefs or social and business activities observed by a certain sector or sectors of human society.

The Definition of Tourism varies source by source, person by person. There is no consensus concerning the definition of tourism. Nearly each institution defines tourism differently. But when it comes to explain it with the basic terms, we can sum up as follow. Tourism is a collection of activities, services and industries which deliver a travel experience comprising transportation, accommodation, eating and drinking establishments, retail shops, entertainment businesses and other hospitality services provided for individuals or groups traveling away from home. The sum of the phenomena and relationships arising from the interaction of tourists, business suppliers, host governments and host communities in the process of attracting and hosting these tourists and other visitors

2.2.2 Tour Operations

Tour operation refers to the combination of tour and travel components to create holiday. Tour operators create itinerary which express many services like transfers from airport to hotel, local flights, meals and type of accommodation, excursions in attractions, transportation and price (Marvell and Watkins, 2005).

2.2.3 Tour Guide

A tour guide is someone who shows visitors around an area, with the guide using extensive local knowledge to share with visitors. According to Dale (2005), the role

of tourist guides is to accompany tourists on excursions and provide information and interpretation about monuments, sites of interest and landmarks in the destinations. Through tourists guiding services there are guides who are employed by tour operators under the contract while others are freelance guides working for their own way of getting the clients. Tour guides are found to exhibit dual commitments to both operators and tourist-clients. Affective commitment to the tour operators was found to partially mediate the relationship between organizational entry HR practices, compensation related HR practices, operations manager interactions, and tour guides' commitment to the tourist-client.

The modern travel and tourism industry has become complex, encompassing diverse organizations. The tourism product consists of various elements, involving transport, accommodation, catering, entertainment, natural resources and also other facilities and services. It cannot be examined prior to purchase or stored, and involves an element of travel. For all these reasons the value and importance of intermediaries through which those products are channeled seem to be obvious. Tour operators and travel agents alleviate market inefficiency in terms of imperfect information or transaction costs, to name but a few.

Although they do not cover the full extent of the distribution channel structure, it is the most significant single relationship in the targeted industry in both countries. Tour operators were chosen from a wide range of travel service providers. Their relationship with travel agents creates one of the several links within the channels of distribution of tourism products, and it is one of the most important.

2.2.4 Sustainable Tourism

Sustainability tourism has defined differently by different scholars. UNWTO (2017) define it as "Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities".

World Conservation Union defines sustainable tourism as environmental responsible travel and visitation to natural areas, in order to enjoy and appreciate nature (and any accompanying cultural features, both past and present) in a way that promotes conservation, has a low visitor impact, and provides for beneficially active socio-economic involvement of local peoples (World Conservation Union, 1996).

However, the definition is sufficiently flexible to allow a variety of approaches and interpretations of the concept. This diversity of views on sustainable tourism and the complexity of the concept have led some tourism academics and practitioners to even question its utility. In this study sustainability tourism is focus on economic aspect as income, capital, innovation, employment, and infrastructure. Social aspect on crime, staffs, traditions and culture. Environmental aspect on degradation of natural resources, poor health and safety and ecotourism.

2.3 Theoretical Literature Review

This study was guided by the following two theories:

2.3.1 Butler's Tourism Area Life-Cycle

Butler's (2006) Tourism Area Life-Cycle states that a destination goes through six different stages in its tourism lifetime. Those stages are exploration, involvement,

development, consolidation, stagnation and finally either decline or rejuvenation. As this theory has been proved true of countries as a whole, it can also be deemed true of communities. As communities are discovered by tourists and visitor numbers increase, the community in question will go through these six stages as would a country as a whole. New areas are being discovered, whether by tourists stumbling upon them, a push by the locals in the community to bring tourism to the area or a destination marketing organisation promoting the area (Butler, 2006).

Once the visitor numbers begin to increase, the community will then begin its journey through the tour guides and operator companies operate consequently. However, in the latter stages of the cycle, when tourism numbers begin to spiral out of control to more than the area can realistically handle, tourism begins to impact the area negatively. Zanzibar is an example of a community, which has gone through the life cycle and has entered a stage of development as Doxey's Irridex Model posits.

Adding to Butler (2006) residents' attitudes toward tourism may pass through a series of stages from "euphoria," through "apathy" and "irritation," to "antagonism," as perceived costs exceed the expected benefits. This model is supported by Long *et al.*, (1990) research results, which indicate residents' attitudes are initially favorable but become negative after reaching a threshold. The Irridex model indicates that residents' attitudes toward tourism would change over time within a predicable one-way sequence. Therefore, this theory may help to analyse the development stages of tours guides and operation in the Islands.

The propensity for tourism to drastically transform coastal communities in developing countries in particular has been the subject of a number of anthropological studies

(Freitag, 1996; Kottak, 1999). Resident perceptions of tourism and its associated impacts have been used repeatedly to study the dynamics of this transformation from the perspective of local communities. Butler's (1980) TALC predicts that as tourism increases so do its associated impacts. Theoretically, in the final part of the development stage, a time of rapid, often uncontrolled change, negative impacts will surpass the positive and the destination will start to decline in the tourism market. Past and present studies of tourism have advanced our knowledge of how to detect and measure impacts but have been less effective in teaching us how to predict or prevent them. Without applicable methods for predicting critical thresholds of development, tourism managers are apt to continue to blindly promote it so long as some benefits are realized. Using the TALC as a point of convergence for studies that address sustainability, carrying capacity and associated indicators could help diminish fragmentation in the tourism literature while reinforcing predictive capabilities.

The theory bases on cycle stages for tourism is relevant to this study because in Zanzibar and Tanzania in general tourism has annual stages of development include low season, high season and peak season whereby number of tourists are differ according to the time of the year for example low season is April and May, peak season is June, July, August and September, High season November, December to March. This study will look every stages and it sustainable tourism.

2.3.2 Hall's Tourism Market System

The tourism system as suggested by Michael Hall (1989) states that the tourism experience is central to tourism, it places the tourist or "market" at the focal point of the entire system (Beeton, 2006) While this may seem an obvious statement it says

much more than would be thought initially. By putting the “tourism experience” at the centre of tourism, this automatically puts all else on the periphery. Things like environmental effects, anti-social behaviour and, of course, the community are after-thoughts in this system.

The system is, in its most basic form, a profit-driven system which at the detriment of all else aims to bring money to the area. In this system, developments in the tourist area are made with the incoming tourist in mind, considering what they may need and want while in the area. What is not taken into consideration is how the community feels about new developments in the area. It seems to be the belief that local communities lack the knowledge and ability to develop and manage tourism plans of their own, which would explain the reluctance of Kirbas (2012).

This theory is relevant to this study because it directly links the tourism sectors and market system, whereby local community, government and other stakeholders such as tour guides and operators taking into considerations by focusing on global tourism online market is very important together with attending trade fairs at every part of the world like ITB – Berlin, Indaba South Africa, Kili fairs Tanzania and other areas.

2.3.3 Principles of Sustainable Tourism

According to World Tourism Organization (2017) “Sustainability principles refer to the environmental, economic and socio-cultural aspects of tourism development, and a suitable balance must be established between these three dimensions to guarantee its long-term sustainability. Sustainable tourism should:

- (i) Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity.
- (ii) Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance.
- (iii) Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation. Sustainable tourism development requires the informed participation of all relevant stakeholders, as well as strong political leadership to ensure wide participation and consensus building.

Using the above principles tour operators and tour guides should focus and emphasis on the development of tourism sector using natural and attraction in the country, traditional and cultural heritage, by ensuring good services for tourists to the level of satisfaction in terms of accommodations, meals, attractions like national parks, beach holiday, historical sites, cultural and other natural resources. They must increase level of knowledge and skills which can help to compete globally with other parts of the world on communication, international languages, history and interpretation of attractions which are available in our country. This may help to increase number of tourists who want to come and visit in Tanzania annual.

Achieving sustainable tourism is a continuous process and it requires constant monitoring of impacts, introducing the necessary preventive and/or corrective measures whenever necessary. Sustainable tourism should also maintain a high level of tourist satisfaction and ensure a meaningful experience to the tourists, raising their awareness about sustainability issues and promoting sustainable tourism practices amongst them (WTO, 2004).

2.4 The Triple Bottom Line of Sustainable Tourism

Sustainable tourism has three key components, sometimes referred to as the “triple bottom line: (International Ecotourism Society, 2004). These components are:

- (i) Environmentally friendly. Sustainable tourism has a low impact on natural resources, particularly in protected areas. It minimizes damage to the environment (flora, fauna, habitats, water, living marine resources, energy use, contamination, etc.) and ideally tries to benefit the environment.
- (ii) Socially and culturally: it does not harm the social structure or culture of the community where it is located. Instead it respects local cultures and traditions. It involves stakeholders (individuals, communities, tour operators, government institutions) in all phases of planning, development, and monitoring, and educates stakeholders about their roles.
- (iii) Economically viable: it contributes to the economic wellbeing of the community, generating sustainable and equitable income for local communities and as many other stakeholders as possible. It benefits owners, employees and neighbors. It does not simply begin and then rapidly die because of poor business practices.

A tourism enterprise that meets these three principals will do well by doing well. This means running a tourism business in such a way that it doesn't destroy natural, cultural, or economic resources, but rather encourages an appreciation of the very resources that tourism is dependent on. A business that is run on these three principles can enhance conservation of natural resources, bring appreciation to cultural values, bring revenue into the community, and be profitable. In reality it is difficult in our areas for tour operators and tour guides to meet them. Tourist activities imply an intensified utilisation of vulnerable habitats. Investors and tourists do not necessarily possess awareness on how to use natural resources sustainably, and subsequently this utilisation often leads to a degradation of resources. Tourism is also a major generator of wastes. In most tourist regions of developing countries, sewage, wastewater and solid waste disposal are not properly managed or planned. Lastly, tourism is also responsible for a considerable proportion of increased volumes and mileage in global transport and hence the associated environmentally damaging pollutant emissions.

2.5 Key Challenges for Sustainable Tourism

Tourism, like others sectors, faces major global challenges. The problems facing tourism and the development of a sustainable tourism sector in the developing countries are diverse as each country has its own touristic features, level of development, and national development priorities and policies.

2.5.1 Lack of Inherent Tourism Potential

In some countries, the development of tourism is impeded by their lack of inherent natural, historical or cultural tourism resources. However, as mentioned earlier, though it is a crucial factor, tourism heritage assets alone cannot make a successful

tourism industry (Dabour, 2003). In relation with Zanzibar there are some inherent potential like historical such as stone Town as one of the World heritage but there is existing of new buildings like Hyatt hotel, Serena hotel and others which reduce the test of it. Also there is another inherent like culture of Zanzibar, which associated with Islamic faith, but tourism itself is one among the factors leads cultural deterioration.

2.5.2 Lack of Tourism-Related Infrastructures

The main issue is the poor quality of tourism infrastructure. This occurs due to several factors such as financial constraint, ineffective monitoring by government agencies and irresponsibility of the appointed contractors. The poor quality of infrastructure will cause various problems such as premature damage, unsafe usage and problems with the functionality of the infrastructure. These problems can lead to dissatisfaction and negative reactions from tourists (Abdullah et al., 2014). Infrastructures refer to telecommunications, roads, railways, electricity, Hotels and lodges, and ports. Thus the government should emphasis on roads, security and health services for tourists.

2.5.3 Lack of Knowledge and Awareness

Butler & Hinch (2007) “Communities have to be knowledgeable and aware of tourism activities taking place in their own surroundings. Supply of educational programs helps to address the issues of sufficient capacity, the issue of how the current tourism and hospitality education curriculum can meet the deeper needs of the indigenous people of the region for sustainability; empowerment and self-determination still need to be considered” In Zanzibar tourism was considered as leisure sector and immoral and the community did not put efforts on it, this resulted other areas like Mombasa and Malindi in Kenya took advantage to dominate tourism market because it is the

place which has the same environment although from 1996 to present taken as one of the basic economic sector in Zanzibar.

2.5.4 Lack of Consistent Tourism Strategies and Policies

The lack of solid institutional context of tourism policy and long-term regulation, result in the exploitation and inadequacy of environmental and socio-cultural resources, as well as the inability of the industry to generate the level of economic benefits desired and expected. In Zanzibar many policies are introduced but there is no effective measures to implement them as a result failure of the attaining their achievements. The government has to make sure that it includes all stakeholders of tourism on policies making and implementation this may help to sustain tourism in all stages. UNEP & WTO (2005) The holistic and equitable principles that underpin sustainable development imply the need to bring together a wide range of stakeholders to develop and manage tourism in a sustainable manner.

2.5.5 Lack of Technical know-how and Weak Promotional Activity

Even when that fundamental awareness is there, in many cases there is generally a lack of tourism knowledge and professionals. Tourism, as a modern industry, is recent in the world. It is also a new and unfamiliar activity in many developing countries. Another related problem is the absent or weak publicity promotion and mass media exposure due, in many cases, to the limited technological services available (Dabour, 2003). During the introduction of tourism as economic sector in Zanzibar there were very few local experts, this led top position of Tourism Company dominated by people outside Zanzibar who are not patriots. Education should focus on preparing locals to dominate in this industry in relation to focus on marketing system which

can attract more tourists. The results offer practical implication to travel marketers and policy makers in the use of different demographic and trip graphics variables in order to effectively market their travel products. (Dev. J. 2016).

2.5.6 Lack of Tourism Investments

While investment in services is a well-established economic activity in the developed countries, it is still lagging behind in developing ones. Investment in tourism may be on private sector on accommodations such as hotel, lodges, resorts, restaurants and rest house. Also on transports like cars, airplane, boats and balloons, also on education for the purpose of training competent and qualified staffs. Investment by government on roads, airports, telecommunication network, ports and social services like education, health, water supply and security in the country. Many of developing country including Tanzania and Zanzibar in general face this challenge of low capital investment on tourism as a result some of sector are dominated by foreigners.

OECD (2018) The ability to finance large sustainable tourism investment projects (e.g. hotels and resorts, attractions, transport, tour operator and other services) can be challenged by a lack of suitable finance instruments. One reason for this is a maturity mismatch: depositors and investors typically prefer to liquidate assets quickly, with the result that available finance instruments tend to be for a shorter term than the longer time period required to realize the investment project and become profitable. This is particularly the case for infrastructure investments.

2.5.7 Lack of Tourism Diversification

Diversification of the tourism industry to these new destinations requires that development is done in a way which is sustainable to avoid the social, environmental

and economic challenges experienced in the existing destinations (Rotich, 2012). In Zanzibar for many years tourism was considered as leisure sector, but it has changed from 1996 into economic point of view in relation to minimize impacts on social and cultural aspects.

2.5.8 Lack of Tourism Safety

One of the fundamental factors for tourist's attraction is safety. To be safe from terrorists, crimes, robbery, thief, political instability, frequent accidents caused by rough roads. Also safety on eruptive diseases like cholera, Ebola, and natural hazard like floods and earthquake. "The tourism industry has been seriously undermined by the growing lack of safety and security. This factor has been identified as one of the five forces causing changes in the tourism sector in the new millennium" (Breda and Costa, 2005).

2.6 Impacts of Tourism

Tourism can be a lucrative source of revenue for a destination, but it can also have major negative impacts on it. These impacts are not only physical, but also cultural. The impacts vary according to the number and the nature of tourists as well as the characteristics of the site at which tourism activities take place. These negative impacts can only be managed effectively if they have been identified, measured and evaluated, (UNESCO, 2008).

2.6.1 Environmental Impacts on Ecosystems

Whenever the negative impacts on the natural environment are dealt with, it should be considered that these impacts rarely affect only one entity, but that the ecological

impacts of tourism usually affect ecosystems as a whole. The impacts on the natural environment do not only effect pristine nature areas, but also cultivated land, which is an important part of the natural and cultural heritage of a region and ecologically valuable because it's the habitat of many species.

Phillips, J. et al., (2009) The rapid growth of tourism in many developing countries also introduces new threats to the environment. Water and energy consumption, utilization of natural resources, and increased wastes are just some potential negative environmental impacts. Through sustainable forms of tourism development many of these impacts can be mitigated. Deterioration of environment led by tourism has been also expressed by different International Organizations. "Environmental impacts of tourism occur at the local, regional and global level. Climate change and the depletion of the ozone layer are two mayor effects of the increasing global traffic and industrial development, in which tourism plays an important role. Environmental impacts that primarily have effects on the local and regional levels are also effect the environment globally in the long run. Basically, loss of biological diversity is a major consequence of these impacts". (UNESCO, 2008)

2.6.2 Negative Socio-Cultural Impacts

Tourism aids change and development and thus has major effects on the cultural development of a society. The reaction of societies towards tourism is diverse: some reject changes, others involucrate them into their traditions and some will abandon their cultural roots altogether. While cultural change is an unavoidable, natural part of human culture, the sudden and forced changes that tourism often brings can cause the complete breakdown of a society and may consequentially cause the loss of entire

cultural tradition. Socio-cultural impacts of tourism are often hard to identify or to measure and a subject of personal value judgments.

2.6.3 Negative Socio-Economic Impacts

The tourism industry generates substantial economic benefits to both host countries and tourists' home countries. Economic improvement is the primary motivation to promote a region as a tourism destination, because tourism can cause massive economic development. But it also has hidden costs with unfavorable economic effects. Rich countries usually profit more from tourism than poorer countries. Least developed countries are at least able to realize the benefits of tourism. Large-scale transfer of tourism revenues out of the host country and the exclusion of local businesses and products reduce the revenues of tourism which could otherwise benefit the local population (UNDP, 2005).

Tourism has a variety of economic impacts. Tourists contribute to sales, profits, jobs, tax revenues, and income in an area. The most direct effects occur within the primary tourism sectors lodging, restaurants, transportation, amusements, and retail trade. Through secondary effects, tourism affects most sectors of the economy. An economic impact analysis of tourism activity normally focuses on changes in sales, income, and employment in a region resulting from tourism activity (Stynes, 1997).

The impacts of tourism can be said to be more than the outcome of a certain tourist event or facility. Impacts appear as modified human behavior, originating from the interactions between the agents of change and the sub-systems on which they impinge. The links between the different categories of tourism impacts; economic, physical and

social are very close and thus interpreted and indicated complex and difficult to measure and plan. The tolerate limits of a destination area's carrying capacity; concerning the economic, physical and social sub-systems determine the dimension and direction of the tourist impact. These limits have been exceeded when the impacts become negative.

When compared with physical and social impacts of tourism, the economic ones are relatively easily measurable. This is because the physical and social impacts are often composed by intangibles and incomparable, thus hard to quantify or analyze numerically (Mathieson and Wall, 1992). One of the key issues arising when discussing economic impacts of tourism is scale (Mason, 2003). Also, Douglas Pearce (1989) noted that the size, diversity and vitality of an economy together with the degree of tourism, local participation and external influences will further influence the impacts of tourism on a destination (Krause).

Although all the factors above are interwoven in real life and the economic impacts affect and are affected by the natural environment and the socio-cultural factors, it should be kept in mind that tourism impacts are not only social, environmental or economic, but there are many inter-related levels. The economic impacts are particularly obvious in less developed countries. However, there seems to be a trade-off situation, where the positive impacts outweigh the negative ones (Mason, 2003). In general, the study of economic impacts has tended to have a more positive point of view, focusing on the number of benefits that tourism can bring although these benefits have been accompanied by a number costs (Mathieson and Wall, 1992).

2.7 Opportunity Costs in Tourism

It is commonly known that tourism involves opportunity costs, although they are not easily definable. When destination areas invest in the development of tourism, they rarely consider what the same resources could provide when invested in another industry. Thus what needs to be researched is “the relative economic benefits of investing in tourism as opposed to investing in another industry”; these are the opportunity costs. In order to measure the opportunity costs, the possibilities that have been relinquished when choosing tourism should be carefully examined, outlined and valued. Because of the difficulty in measuring and seeing these costs, they are often forgotten, thus leaving the economic impacts of tourism look more beneficial than they perhaps are (Mathieson and Wall, 1992).

2.8 Overdependence on Tourism

When destinations become over dependent on tourism, they make themselves vulnerable to tourists’ changes in demand. Tourism is a sensitive industry and influenced by change, both domestic and international. The change can comprehend changes in price and trends, political events and political unrest as well as accessibility of electricity. Areas with political unrest have lost out on tourists, who choose to travel to other, more stable destinations. In order to avoid economic disturbance due to changes in demand, tourist destinations should promote a diversified tourist industry and base economy (Mathieson and Wall, 1992).

2.9 Inflation and Land Value

The changes in land-use patterns from an agricultural society to the tourism industry introduces modified land-use patterns as tourism increases land prices as a result of

competition and thus encourages sales. This means that small units of land are sold at high prices thus contributing to inflation. This affects young residents when they try to buy land. Simultaneously self-sufficiency is decreased and dependency on national and international economic conditions is increased. The consequences of inflation might arise in many different ways. Rich tourists buy products at higher prices and when the suppliers realize that this increases their profits, they raise the prices further. This means that companies servicing tourists easily can compete with those servicing the local population (Mathieson and Wall, 1992). As a consequence however, the locals are forced to pay more and maybe even have to go further away in order to get what they need, as the local enterprises concentrate on a more limited range of products (Ibid).

2.10 Seasonality of Tourism

As the tourism product cannot be stored and is highly seasonal, it needs to earn enough during high season in order to fight and survive the decline during the rest of the year. This also has obvious implications for employment and investment. The seasonality of tourism leads to a division between high- and low season. Take the hotel sector as an example. Some of the hotels are closed during low season, whereas others suffer great losses in income (Mathieson and Wall, 1992). As fixed costs cover a big part of the total costs, the hotels try to ensure as good as possible incomes. The accommodation sector is however not the only sector suffering from seasonality. Tour operators face reluctance from outside investors to get financially involved in marketing seasonal enterprises. This has led to the fact that local investors are carrying a much bigger financial responsibility (Ibid).

2.11 Leakage of Tourism Industry

Leakage can be defined as financial processes through which less money gets back into the economy. Leakage occurs mainly in two different ways; as import or export leakage. When tourists demand standards that the host country cannot supply, import leakage occurs and this especially in less developed countries. As import is necessary, most of the income from tourist expenditure leaks out of the country in order to pay for the imports. According to UNCTAD (UNEP, 2004) import-related leakage for less developed countries and small economies is on average between 40% and 50% of gross earnings whereas the same figure for advanced and diversified economies is between 10% and 20%. Export leakage occurs when foreign investors, financing resorts and hotels, collect their profits back to their country of origin. This is a substantial part of the leakage that occurs in less developed countries as multinational corporations are the only ones there with enough capital to invest in tourism infrastructure and facility construction, (UNEP, 2004).

The main argument for tourism development in less developed countries has been that of foreign exchange. However, it seems as if those countries that need the foreign exchange make the lowest profits (Krippendorff, 1987). As they are the least developed ones, they are also the ones that need to import the most. The most extreme cases show that 80 to 90 percent of the foreign exchange leaks out before any improvements have taken place (Ibid).

2.12 Capital Investment and Development

Another factor why the money does not reach the local economy, is that the governments of the host destinations usually offer tax-free spurs to foreign developers

and investors and thus the income they gain from their all-inclusive resorts, leak out of the country and the local economy gains very little. As an example, it has been estimated that 60% of the £4 billion annual tourism revenue in Thailand leaves the country. As the all-inclusive are westernized from beginning to end, the tourists end up spending their money in western hotels, they consume western food and drink and thus the small amount of money that actually reaches the destinations, mostly leaves it again as profits to western companies in terms of imports (Tearfund, 2002).

2.13 External Costs

The development of tourism also impose other costs on the residents of tourism destinations, such as increased costs of garbage handling and increased costs of maintaining tourist attractions that have been damaged by excess of the carrying capacity and vandalism. However, there has been little study into these kinds of costs (Mathieson and Wall, 1992). In brief, the tourist system changes overtime which means that as tourist numbers increase, the control by locals decreases thus increasing the control by the tourism industry which again leads to increased impacts (Prosser, 1994).

Leveraging Destination Marketing for Economic Benefits Paralleling the sophistication in the tourism industry's product is a new sophistication in marketing. Destinations are also spending ever greater amounts on tourism marketing to create greater awareness of the destination in target markets and facilitate industry's efforts to "close the sale." Traditional destination marketing has focused on creating awareness of the destination in target markets, usually with some form of destination branding or logo "call to action." Recognition of the importance of tourism has carried

with it ever increasing investments by many jurisdictions seeking to strengthen their tourism sector and compete effectively in the marketplace. There is also a recent emphasis on linking tourism with a destination's exports. This relates to the "branding" approach many destinations take in positioning their tourism product against those available worldwide.

There are several other categories of economic impacts that are not typically covered in economic impact assessments, at least not directly. For example: Changes in prices -- tourism can sometimes inflate the cost of housing and retail prices in the area, frequently on a seasonal basis, Changes in the quality and quantity of goods and services – tourism may lead to a wider array of goods and, Changes in property and other taxes – taxes to cover the cost of local services may be higher or lower in the presence of tourism activity. In some cases, taxes collected directly or indirectly from tourists may yield reduced local taxes for schools, roads, etc. In other cases, locals may be taxed more heavily to cover the added infrastructure and service costs. The impacts of tourism on local government costs and revenues are addressed more fully in a fiscal impact analysis. Economic dimensions of social and environmental impacts. There are also economic consequences of most social and environmental impacts that are not usually addressed in an economic impact analysis. These can be positive or negative. For example, traffic congestion will increase costs of moving around for both households and businesses. Improved amenities that attract tourists may also encourage retirees or other kinds of businesses to locate in the area.

General, speaking tourism brings about changes in value systems and behavior of the people and cause changes in the structure of communities, family relationships,

collective traditional life styles, ceremonies and morality. The ambiguity of socio-cultural impacts is due to the fact that tourism may have impacts that are beneficial for one group of a society, but which are negative for another, (Hawkins, 2005).

2.14 Empirical Literature Review

The study by Bohdanowicz et al., (2011) in UK which used descriptive analysis revealed that first, sustainability activities may carry a financial cost, or they are at least perceived that way. Cash flow and ever-diminishing tour operator contract rates are found by many authors when using interview as a result of lack of financial investment in technical solutions (Bastakis et al., 2004; Font et al., 2006; Tapper 2001). Payback from no-cost/low-cost measures could be used to fund technical solutions that require initial financial investment; however, a lack of willingness or ability to engage means that this opportunity is not always exploited.

Moreover, Bohdanowicz et al., (2011) reveals that human barriers facing tour operators in UK include resistance to change, a lack of qualified staff and training programmes, a lack of understanding and the inability to plan (Amoah and Baum, 1997; Bohdanowicz et al., 2011; Dong and Wilkinson, 2007). Tour operator resources and those of their suppliers may be too limited to engage in technical assistance or investment programs in UK. This study applied the descriptive analysis (Schwartz and Font, 2009).

The study by Baddeley and Font (2011) used descriptive and qualitative analysis to assess the barriers to tour operator sustainable supply chain management in UK. They found that tour operators face a huge challenge in Health and Safety (H&S) working

environment. For over a decade, hotel managers have been bombarded with H&S codes of practice, Hazard Analysis of Critical Control Points, legionella procedures and more. Managers are worried of implementing new initiatives that appear to conflict with H & S.

The results of the online survey and interview involved tour operators conducted by Twining-Ward (2010) by descriptive analysis revealed that there is some consensus on the key challenges facing the tour operations sector in SSA. These are cost, security, access, business environment, service standards, and market image. The limited frequency and the high cost of flights reduce the ability of ground operators to access mid-end and low-end travelers. Poor roads constrain the development of new destinations and cause considerable wear and tear to vehicles.

Moreover, Twining-Ward (2010) by reported that high cost of vehicles and vehicle parts and the lack of maintenance skills make it expensive to operate ground transfers. High interest rates make it hard for operators to borrow money to grow their business. Continual increases in park fees and the high cost of utilities put a strain on business operations. Low service quality results in poor value for money in many SSA destinations. The study also stressed the need for more reliable ground operators and a more professional approach to destination marketing (Twining-Ward, 2010).

Kazuzuru, B (2014) using descriptive analysis assessed history, performance and challenges of tourism industry in Tanzania. The study revealed that the challenges which face the sustainability of tour operations and guiding services is what tax policy which should be in place for maximizing government revenue without hampering the growth of the sector.

Kulindwa et al., (2001) by using descriptive analysis assessed the tourism growth for sustainable development in Tanzania. The study found that the challenges which face the sustainability of tour operations and tour guiding services were the disposal waste product such as plastic bags. Another serious environmental threat associated with tourism is the depletion of ebony trees, which are used for making carvings for sale to tourists. The study further revealed that in Tanzania mainland the coastal areas such as Bagamoyo, tourist activities have lead to the destruction of mangrove trees through hotel construction, the discharges of untreated waste from hotels into the sea and beach erosion.

Mgani (2007) by using descriptive analysis assessed whether tourism is a male dominant industry or not in Arusha-Municipality. The study revealed prostitution was the main social challenge facing tourism in Arusha City. The study further asserted that Prostitution has led to the spread of several diseases, particularly AIDS. Other problems associated with cultural interference include excessive smoking and drug use.

Chen (2001) by using content analysis assessed recent trends of hospitality and tourism research on china the study found that the challenges of faces sustainability of tour operations and tourist guiding services the destruction of tourist sites and natural landscape, the pollution of environment, the shortage of financial resources for infrastructure development, the persistent attitudinal problems among service personnel, and the pressure from the competitors in the Asia-Pacific area with more diversified tourism product and higher service quality.

The above challenges observed by different scholars they will help this study to identify if they also exist in Zanzibar and how the government, institutions and society take efforts towards solving and maintained the position of tour operations and tourist guiding services.

2.15 Literature Gap

The view that tourism is one among the important sectors in the economic development of the country gets its reality by having good services in the ground. Literatures explained the economic importance of tourism sector (e.g. Beeton, 2006; Butler, 2006). However, researchers (e.g. Ertuna and Kirbas, 2012) suggest more studies on the importance of tours operators and guides in tourism development to be done.

Little has been done to assess challenges, which face sustainability of tour operation and tour guiding services in Zanzibar, Tanzania. However, researchers such as Mutayoba and Mbwete (2013) interested on assessing contribution of tourism industry to livelihood improvement. Yet, little is known about challenges facing sustainability of tour operating services in Zanzibar. In order to address the information gap, the study aimed to explore challenges, which face sustainability of tour operation and tour guiding services in Zanzibar, Tanzania.

2.16 Conceptual Framework

The conceptual framework of the study in Figure 1 explains possible challenges, which face sustainability of tour operation and guiding services. Tour operations and guiding must be economically, socially and environmentally sustainable. However,

sustainability might face several challenges. Challenges to sustainability of tour operation and guiding can be economical including lack of financial capital, low income, inability to plan and lack of innovativeness. On the other hand, social challenges which can face the sustainability of tour operators and guides are lack of qualified staff and training opportunities. In addition, tour operations and guiding services should be environmentally sustainable. However, poor health and safety in tourist destinations as well as degradation of natural resources and other tourist attractions can be some of the challenges.

Independent Variables

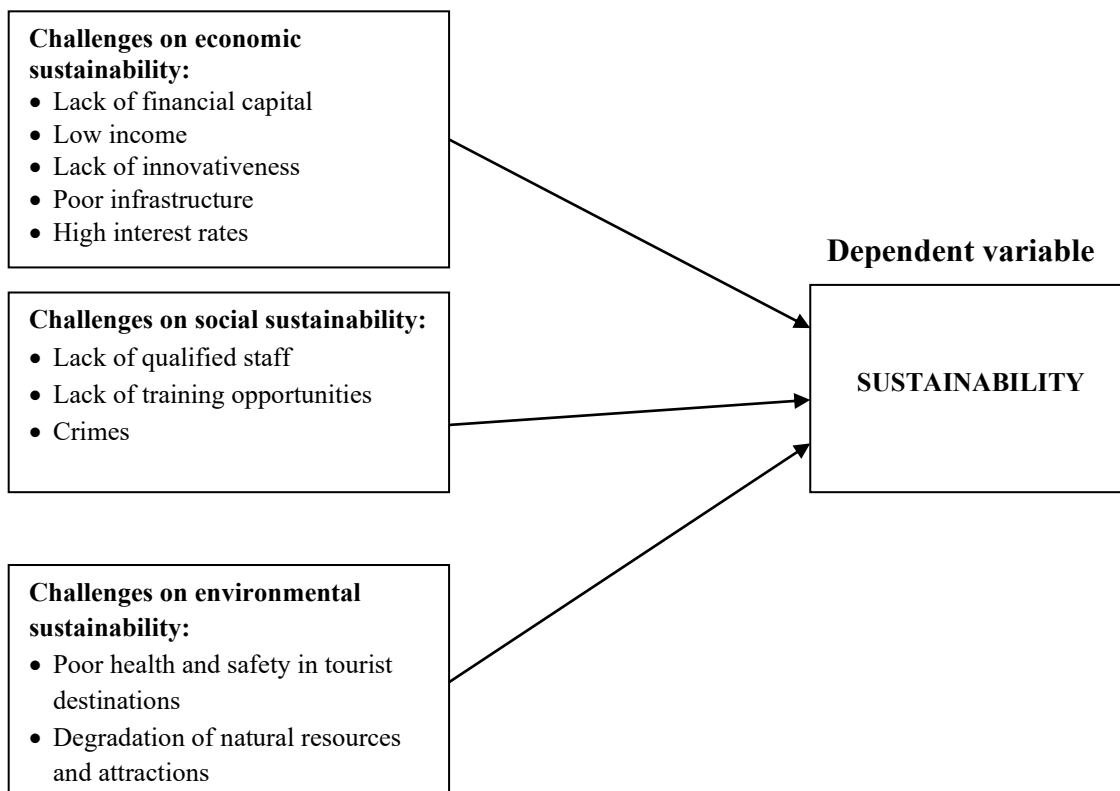


Figure 2.1: The Conceptual Framework Showing Relationship between Research Variables

CHAPTER THREE

RESEARCH METHODOLOGY

3.1 Overview

This chapter provided the research plan for data collection, organization, presentation and analysis. It covers study design, population of the study, procedures expected to be employed in selection of participants into the study, variables and measurements, methods of data collection, data processing, analysis and presentation, validity and reliability as well as considerations of ethical issues.

3.2 Study Area

This study was conducted in Zanzibar town at Stone Town. This area is selected due to the fact that it is one among the prominent areas for tourism, and within it there are numbers of tour operators and tour guides who are the target of the researcher during data collecting stage.

3.3 Study Design

Due to the nature of the study, researcher adopted a cross sectional design which allows data collection for random and purposive sampling population. According to De Vaus (2001) a cross-sectional survey refers to collection of data from a sample of individuals (or groups) at a particular point in time as a basis for inferring the characteristics of the population from which the sample comes from.

3.3 Unity of the Study

The unity of the study involves people dealing with tourism industry including tour operators, guides and community members who engage in and are aware of tourist activities.

3.4 Sampling Procedure and Sample size

The study used simple random method to select 80 participants representing a group of tour operators and tour guides. The lists available in their associations helped to obtain sampling frame. Also, 40 community respondents obtained through simple random sampling. Purposive sampling was used to obtain 2 from ZATO officials, 2 officials from Ministry of Information, Tourism, Culture and Sports, 3 officials from ZCT, 3 officials from ZATOGA, 2 officials from ZRB and 2 officials from TRA. The overall sample size of the study was 134 respondents.

3.5 Types Data and Data Source

The study used primary data, which are qualitative and quantitative. The data was collected from responsible tourism governing national departments, tour operators, tour guides and community members. Moreover, the secondary data were collected from the relevant sources.

3.6 Methods of Data Collection

The study used structured questionnaire and interview as tools for data collection. The self-administered questionnaire consisting of closed and open ended questions was used in the collection of quantitative data. On the other hand, interview through guided by checklists was used to assess in-depth information regarding an area of focus of the study topic.

3.7 Variables, Measurement and Logistic Regression Model

The study composes dependent and independent variables with measurable indicators as indicated in Table 3.1.

Table 3.1: Variables and Measurable Indicators

Variables	Measurement Indicators
Dependent variable	
Sustainability of tour operator/guide	1-if threatened sustainability of tour operator and tour guide 0- Otherwise
Independent variables	
Capital (X1)	1 for sufficient capital; 0,Otherwise
Income (X2)	1 for sufficient income; 0, Otherwise
Roads (X3)	1, Satisfied with road infrastructures; 0,Otherwise
Qualified staff (X4)	1, Qualified staff; 0, Otherwise
Training (X5)	1, If has access to training; 0, Otherwise
Innovativeness (X6)	1, presence of Innovativeness ability; 0, Otherwise
Planning (X7)	1, Ability to plan; 2, Otherwise
Health and safety (X8)	1,If there is conducive health and safety environment; 0, Otherwise
Conservation (X9)	1, If the environment in tourist destinations is not polluted; 0, Otherwise
Crime (X10)	Extent of crime against tour operators and guides (5 score index scale)
Destruction of traditional culture (X11)	1, If tourism destructs traditional culture 0, Otherwise

Source: Constructed from literature review

3.8 Data Processing and Analysis

Quantitative data were analyzed by descriptive and inferential statistical methods through SPSS version 20. The Logistic regression model was used to examine whether income, capital, innovativeness, training opportunities, qualified staff, ability to plan, infrastructure, health and safety codes and conservation ability to natural resources are challenges which threaten the sustainability of tour operators and guides.

This model was adapted from Haque et al (2011) and Magali (2013) and is written as follows:

$$\text{Log}\left[\frac{P_i}{1-P_i}\right] = \text{Logit}(P_i) = \beta_0 + \beta_1 x_1 + \beta_2 x_2 + \beta_3 x_3 + \beta_4 x_4 + \mu \dots \dots (3)$$

Where β_0 is the intercept and μ is the error term, P_i measures probability that the tour operator/guide perceived threatened sustainability, and $(1-P_i)$ if otherwise.

According to Magali (2014), logistic regression is suitable for assessing the variables with two outcomes. However, its major weakness is lack of considering some of the assumptions of the linear regression model such as normality, heteroscedasticity, multicollinearity and autocorrelation. On the other side, content analysis was applied for qualitative data collected through interview and presented in themes and concepts regarding the topic.

3.9 Presentation of the Research Data

The findings also have presented in form of tables in which the descriptive statistics such as frequencies, percentages, maximum and minimum, and standard deviations and variances are among the out puts of the analysis. Also, outputs of the logistic regression have presented at 5% significance level.

3.10 Validity and Reliability

The study was considered issues of validity and reliability. A number of measures was undertaken in order to assure validity and reliability. In making sure that the data collection tool is reliable by providing the accurate data information, pre-testing of the data collection tool was initially done before undertaking official data collection. The

findings from the pre-test helped to address shortcomings of the data collection tools and therefore, helped the researcher to make improvements.

Moreover, the researcher has been thoroughly surveying related literature to ensure what was studied is valid by adapting methodologies used in similar studies as well as cross-checking variables expected to be used by the study if other researchers were also used them in other study areas and successfully managed to collect information. In addition, relevant recommendations provided by the supervisor contributed to enhance the validity of this study.

3.11 Considerations to Ethical Issues

The proposed study was highly taken into consideration ethical issues. In so doing, the researcher was given by the Open University of Tanzania an introductory letter, which introduces and allows him to carry out the study in selected study area. This enhanced trust of the respondents upon the researcher. In addition, the respondents were given a free decision to attempt the kind of questions, which they feel comfortable. Moreover, confidentiality to the information given by respondents was highly maintained by the researcher.

CHAPTER FOUR

RESULTS AND DISCUSSIONS

4.1 Overview

This chapter describes results of the study and provides justifications. It covers the description of background information of respondents and description of challenges facing tour operators and tour guides in the study area with a focus of social, economic and environmental challenges. In addition, tour guides tour operators, community members and national tourism governing organs have used as sources of information.

4.2 Background Information of Respondents

The background information described by the study with respect to the respondents includes sex, age, marital status, education and nature of employment.

4.2.1 Age of the Respondents

Based on results in Figure 4.1, most (38.8%) of tour guides and tour operators participated in the survey were in the age group of 36-45 years, followed by those (28.7%) in the age group of 26-35 years. In overall, majority (91.3%) of tour guides and tour operators were at most 45 years. The results demonstrate that tour guided and operators constitute the active community working group which is most important in attaining sustained socio-economic development.

Similar to tour guides and tour operators, all community respondents had almost 45 years (Table 2). The age group of 36-45 years constituted the majority of community

participants (40%), followed by other groups of 26-35 (37.5%) years and 18-25 years (22.5%).

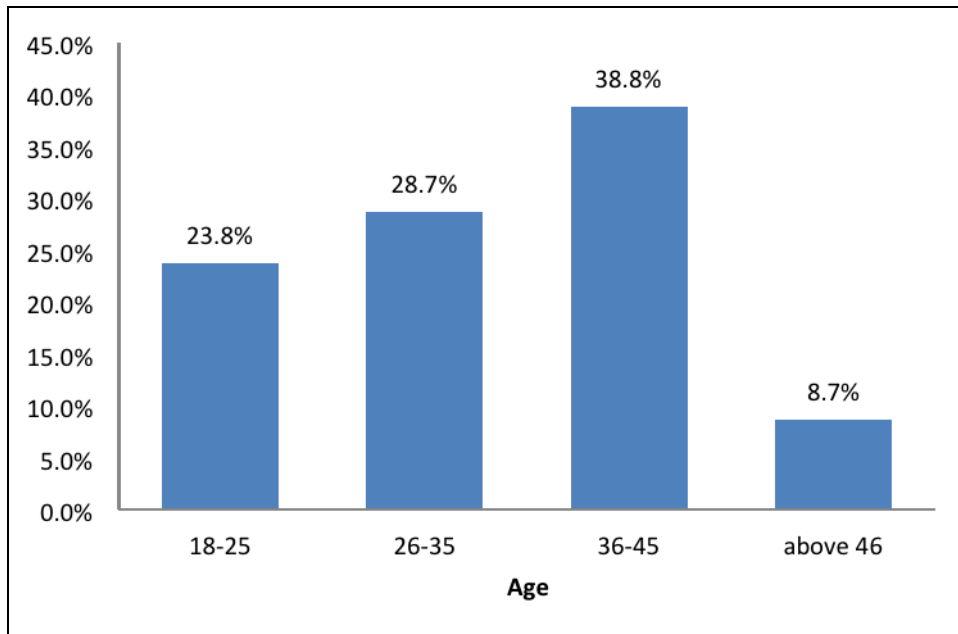


Figure 4.1: Age Distribution of Tour Operators and Guides (n=80)

Source: Field Data (2016)

Table 4.1: Age Distribution among Community Respondents

Age group	Frequency	Percent
18-25	9	22.5
26-35	15	37.5
36-45	16	40.0
Total	40	100.0

Source: Field Data (2016)

4.2.2 Sex and Marital Status

The distribution of respondents based on sex revealed that both groups of participants, community members (65%) and tour guides and operators (61.2%) dominated by males (Table 3). Dominance of males in tour operation and guides is a result of socialization existing in the society, which assigned activities to be performed by

males and females. However, most of paid activities such as tour operators and guides are usually done by men.

On the other hand, most of survey participants; 62.5% of community members and 61.3% of tour guides and operators are married (Table 3). Their marital statuses explain that they have responsibilities of taking care of their family members especially children.

Table 4.2: Distribution of Tour Operators and Guides Based on Sex and Marital Status (n=80)

Variable	Tour operators and guides		Community	
	Frequency	Percent	Frequency	Percent
Sex				
Male	49	61.2	26	65
Female	31	38.8	14	35
Total	80	100	40	100
Marital status				
Married	49	61.3	25	62.5
Single	31	38.8	15	37.5
Total	80	100	40	100

Source: Field Data (2016)

4.2.3 Education Level

Results show that 51.2% of tour guides and tour operators had secondary education and 33.8% had tertiary education (Table 4). On the other hand, most of community participants had primary education (55%) while 30% had secondary education. Among the tour guides and operators, 10% of them had no formal education (Table 4). However, neither of community participants had no formal education. Education for

tour guides and operators is essential as it assist them to effectively and efficiently perform their activities.

Table 4.3: Distribution of Respondents Based on Education Level

Education	Tour operators and guides		Community	
	Frequency	%	Frequency	%
No formal education	8	10	0	0
Primary education	4	5	22	55
Secondary education	41	51.2	12	30
Tertiary education	27	33.8	6	15
Total	80	100	40	100

Source: Field Data (2016)

4.2.4 Nature of Employment

Results on the determination of the type of employment indicate that 51.3% of tour guides and tour operators have wage employment while 48.8% are self-employed (Figure 3). Therefore, tourism is an important means of employment as people especially youths can be self-employed. This may contribute to reduce unemployment rate, which mostly affect youths.

Tour guides and tour operators found to participate in different tour activities such as snorkeling, reservation, marketing and internet service. Marketing of goods attractive to tourists (91.3%), tourism based on reservation (88.8%) and operating internet service (87.5%) were activities which are mostly performed by tour guides and tour operators in the study area (Figure 4). Other tour activities include tour driving guides (65%) and snorkeling (35%).

4.3 Challenges Threatening Sustainability of Tour Operators and Tour Guides

The challenges, which face tour operators and tour guides have assessed with regard to social, economic and environmental perspectives. Findings and descriptions of challenges appear in sub-sections 4.3.1, 4.3.2 and 4.3.3 while inferential assessment has been explained in sub-section 4.3.4.

4.3.1 Descriptive Statistics of Economic Challenges Threatening Sustainability of Tour Operators and Tour Guides

4.3.1.1 Income and Innovativeness

In responding to the overall annual income, majority (77.5%) of tour operators and tour guides demonstrated to have average annual income of less than 20 million. Others earn 21-40 million (17.5%) annually and few (5.0%) guides and operators earn the annual income of 41-50 million. The results, therefore, reveal that there is variation in annual income between tour companies. This might be a result of factors such as differences in firm size, capital and market competitive capacity. This observation is in support with Anderson (2013) who asserts that most resorts in Zanzibar are owned, managed and operated by non-locals who have sufficient capital and effective strategies for marketing and that only 16 percent of the resort requirements are sourced within Zanzibar.

In responding the innovation ability on tourism service, most (52%) of tour guides and operators participated in the survey are not satisfied with the overall innovation ability with respect to their tour business activities while 43.8% had realized to be satisfied with their abilities to tour business innovation (Table 5). The findings justify that tour operators and tour guides have less innovation abilities with respect to their

businesses. In today's saturated markets customers look the tour companies, which can offer quality service. Also, tour companies are supposed to have abilities in expanding market area so as to reach more customers. Therefore, to attain all of these, tour operators and guides are required to have adequate innovation abilities, which can make them to overcome stiff competition from similar tour companies.

Table 4.4: Response of Tour Operators and Guides on Income and Innovative Ability as Challenge Factors (n=80)

Variable	Frequency	Percent
Annual income (in millions T.sh)		
Less than 20	62	77.5
21-40	14	17.5
41-50	4	5.0
Total	80	100
Innovation ability		
Satisfied	35	43.8
Not satisfied	45	56.2
Total	80	100

Source: Field Data (2016)

4.3.1.2 Infrastructure Development

In order to attract tourists, tourism destinations must have suitable infrastructure including tourist-related services, which support the use of water and land travels for touristic purposes. Infrastructure also enhances the development opportunities of tourism businesses. According to the respondents, the infrastructure in the study area is not supportive (81.2%) as shown in figure 5. The findings concur with the report of revealed by Ministry of Natural Resources and Tourism (MNRT) which reveals that country's poor infrastructures such as unreliable roads, railways, air ports and

accommodation is among the main challenges facing the tourism industry development in Tanzania (URT, 2002).

Other observations by Githore and Ogutu (2015) reveal that while the tourism industry in Africa is growing strongly, infrastructure investments including airport development, road and rail, and communication technologies are lagging behind, leading to significant bottlenecks. These will worsen tourism development if not effectively addressed, given that cities are likely to triple in size in the next 20 years.

4.3.1.3 Availability of Capital

Overall, tourism services are very capital-intensive and depend on external partners and other factors. In assessing economic challenges of tour operator and tour guide, the result reveals that majority (76.3) have capital less than 10 m, while others have a capital of 11-20m (21.2%) and very few tour operators and tour guides relies on the capital above 20 mil (2.5%), This shows majority of tour operators and tour guides in the study area are suffering from low capital in their day to day operation. The significance of finances as a constraint to small business growth cannot be overlooked since capital is a major factor of production. Tour operators play the main role in the tourism supply chain. Their activity consists of buying tourism services in bulk directly from providers, combining them in attractive holiday packages, and then selling them, either directly to the customer or through a travel agent. The observation from Christies et al, (2011) reveals that the four pillars of successful tourism development are financial, economic, environmental and social sustainability. Without any one of these four conditions the sector will falter financial sustainability of the investments in accommodation and tourism.

4.3.1.4 Community Views Toward Challenges Facing Tour Operators and Guides

The community members put forward several challenges that are facing tour operators and guides. The majority of respondents ranked lack of capital (73%) among tour operators and tour guides as the as main barrier contributing to their poor performance (Figure 7). Other challenges mentioned include stiff competition (60%), seasonality of the tour business (57%), multiple Taxes (45%) and world economic recession (42%).

In today's globalized market, every tourism product competes with every other at its price point. Although the prime decision maker is the individual traveler, the size of the flow of tourists to a particular destination is to a considerable extent determined by the world tourism industry, represented by tour operators, travel agents and transport services in the countries of tourist origin. Travel and Tourism often face strong competition from other fast-growing sectors recruiting similar types of talent and often paying higher salaries.

On the other hand, TRA and ZRB when interviewed put forward that tour guides and tour operators are regularly provided seminars related to tax education so as for them can understand what they are required to pay as tax. They are also explained on the use of such revenues from taxes basically to improve tourism infrastructures such as roads and improving other social services such as health services and water infrastructures.

Similar observations by Gisero and Ogutu (2015) on multiple taxes reveal that taxes on Tourism Investments to many private investors in tourism are burden and they

have been complained that the government taxes them beyond their capacity to pay. Governments are often tempted to look for more tax revenues from entities in the tourism sector.

Tour guides and operators face challenge lead by seasonality of tourism activities (Figure 7). During high peak seasons where there is a higher flow of visitors, tour guides and tour operators accrue maximum benefits. However, tourism business lags behind in low peak seasons where there is low number of visitors. The study findings are in support to INE (2010) which reported that The Balearic Islands and Hawaii are good examples of the two types of destinations that are affected by the problem of seasonality and this was mainly due to its changing climatic conditions, the Balearic Islands have seasonality far superior to Hawaii, where it is minimal.

4.3.2 Descriptive Statistics of Social Challenges Threatening Sustainability of Tour Operators and Tour Guides

The study assessed on if tour operators and tour guides are satisfied with adequacy of qualified staff they have. The findings reveal that majority (53.8%) of respondents are satisfied by the number of qualified staff which tour operators and guides have, while 46.2% are not satisfied with the number of staff they are possessing. This observation contradict with the findings by NOVIJVP (1995) which reveals that present output of graduates from the Hotel and Tourism Institute has been too low to meet the increasing demands of the industry. Therefore, a number of unregulated and sub-private schools have arisen and standards of training are uneven

In addition, the Integrated Tourism Master Plan (2002) is contrary to the findings as it identified poor service standards, poor quality guides, low quality tour operators and

lack of quality accommodation as weaknesses of the Tanzanian tourism product all of which may be a result of lack of and poor quality human resources. The problem of the low level of local human resource development in terms of quality and skills to serve in more sophisticated tourism undertakings is also recognized under MKUKUTA II (2010)

Table 4.5: Response of Tour Guides and Tour Operators on Social Challenges Affecting their Businesses (n=80)

Variable	Frequency	Percent
Adequacy of qualified staff		
Satisfied	43	53.8
Not satisfied	37	46.2
Total	80	100
Access to training		
Have access	62	77.5
Have no access	18	22.5
Total	80	100
Incidence of crimes		
Low	43	53.8
High	37	46.2
Total	80	100

Source: Field Data (2016)

Moreover, when interviewed, community members put forward that destruction of traditional culture is a challenge, which threatens the survival and performance of tourism activities practiced by tour guides and tour operators in the study area. People are now imitating western life style in performing social aspects such as wearing styles and western music.

4.3.3 Descriptive Statistics of Environmental Challenges Threatening

Sustainability of Tour Operators and Tour Guides

Basing on environmental challenges, control of environmental pollution neither agreed nor disagreed by tour guides and operators (Table 7). This justifies that efforts toward environmental control are not recognized by tour companies. On the other hand, tour guides and operators participated in the survey disagreed that there is health safety condition with minimal waste discharge around the destination sites (Table 7). Therefore, waste discharge is a challenge of attaining sustainable tourism.

Table 4.6: Response of Tour Guides and Tour Operators on Environmental Challenges Facing their Business (n=80)

Variable	Frequency	Percent
Control of environmental pollution		
Satisfied	40	50
Not satisfied	40	50
Total	80	100
Health safety condition		
Satisfied	30	37.5
Not satisfied	50	62.5
Total	80	100

Source: Field Data (2016)

The community perceives that damage of the ecosystem in the destination areas is the main environmental challenge (81%) as shown in figure 8. Some people destroy cultural heritage sites and attractive areas along the coastal areas. Also, there is a destruction of forest resources such as mangrove forests, which stabilize the coastal lands and habitat of important marine species.

Other main challenges of tour operators and tour guides, which put forward by the community include solid wastes and sewage (73%), and climate change (65%) as shown in figure 8. They justified that tour companies especially hotels, and other manufacturing companies have no proper control of the wastes they discharge. In so doing, solid wastes and sewage spread in many places. These reduce the authenticity of tourism destination sites. Climate change led to the increase in temperature and therefore as well as affects the survival of flora and fauna, which are attractive to tourists.

4.3.4 Logistic Regression Analysis of Challenges Threatening Sustainability of Tour Guides and Tour Operators

Despite the descriptive statistics regarding tourism challenges facing tour operators and tour guides, the study has assessed whether there are significant challenges, which has influence on threatening sustainability of tour operators and tour guides. Logistic regression was used and sustainability regressed as dependent variable and coded as binary indicators, 1 if perceived to threaten sustainability of tour operators and tour guides, and 0 otherwise. Independent variables are possible challenges shown in Table 3.7.

Among the possible challenges examine, the study reveal that health safety, infrastructure, qualified staff and crimes are challenges, which are significant to tourism sustainability. Health safety although it was identified not convincing sustainability of tourism, the regression reveals that destination areas where health safety is perceived to be favorable, tour operators and tour guides assumed to have sustainability ($\beta_1 = -1.614$, $p=0.199$) and therefore if there is good hygienic conditions

in tourism sites, there will be a minimal likelihood of threatening sustainability of tour operators and tour guides ($\exp(\beta_1) = 0.199$). However, there is poor hygienic condition in many areas attractive to tourists in Zanzibar and hence, remain threatening the sustainability of tour operations and tour guides.

Moreover, the study identified that infrastructure support can minimize the likelihood of threatening tour operators and tour guides sustainability despite to the fact roads and other communication infrastructures are very poor in many tourism destination areas in Zanzibar. Infrastructure development reduces the likelihood of threatened sustainability of tour operators and tour guides by $\exp(\beta_1) = 0.164$.

Therefore, the findings justify that development in infrastructures can promote sustainability of tour guides and tour operators. Availability of qualified staff also found to be significant and negatively ($\beta_1 = -1.488$, $p = 0.014$) related with threatened sustainability of tour guides and tour operators. This justifies that although majority of tour guides and tour operators lack adequate skills on tourism business, tourism education in many staff can enhance the performance and sustainability of tour guiding and tour operations. Qualified staff minimizes the likelihood of threatened sustainability by of tour operators and tour guides by $\exp(\beta_1) = 0.226$.

Furthermore, crime found to be significant and positively ($\beta_1 = 1.811$, $p = 0.011$) related with threatened sustainability of tour operators and tour guides. It maximizes the likelihood of threatened sustainability among these tourism stakeholders by ($\exp(\beta_1) = 1.811$). Increase in crime in tourism sites endangers the tourism business run by operators and tour guides. Apart from these, other challenges facing tour operators

and guides found to be not significant in relation to the influence on sustainability of tour operators and tour guides.

Table 4.7: Relationship Between Tourism Challenges and Sustainability of Tour Operators and Tour Guides (n=80)

Variable	B	S.E.	Wald	Sig.	Exp(β)
Training	1.355	0.848	2.552	0.110	3.878
Innovativeness	0.502	0.596	0.710	0.399	1.653
Health safety	-1.614	0.809	3.985	0.046	0.199
Pollution	0.167	0.637	0.069	0.793	1.182
Crimes	1.811	0.714	6.434	0.011	6.119
Infrastructure	-1.805	0.890	4.118	0.042	0.164
Qualified staff	-1.488	0.607	6.002	0.014	0.226

Source: Field Data (2016)

CHAPTER FIVE

FINDINGS, CONCLUSION AND RECOMMENDATIONS

5.1 Summary of Findings

The summary is based on results with respect to the study objectives. It covers social, economic and environmental challenges facing tour operators and tour guides in Zanzibar.

5.1.1 Social Challenges Facing Tour Operators and Tour Guides

The study identified crime as significant social challenge ($\beta_1=1.811$, $p=0.011$) and availability of qualified staff ($\beta_1= -1.488$, $p=0.014$), which threatens sustainability of tour operators and tour guides in Zanzibar Islands. Also, the interview which involved community members reveal that destruction of traditional culture also adversely affects sustainability of tourism activities in the study area.

5.1.2 Economic Challenges Facing Tour Operators and Tour Guides

The economic challenges which are significant as if improved may reduce the likelihoods of threatening sustainability of tour operators and guides include existing infrastructures such as roads and water ways to reach the destination sites ($\beta_1= 1.805$, $p=0.042$) existence of poor road and waterways infrastructures do not favour sustainability of tour activities. Other challenge mentioned by the community as pulling back tour operators and guides development is inability to innovation (56.2%) to improve the performance.

5.1.3 Environmental Challenges Facing Tour Operators and Tour Guides

Health safety in the destination areas has negative relation with threatened sustainability of tour operators and tour guides ($\beta_1= -1.614$, $p=0.199$) although still

there is poor health safety in areas surrounding tourist attractions in Zanzibar most of areas are quit dirty due to pollution caused by poor sewage disposal and other spread of waster products. Other environmental challenges facing tour operators and guides mentioned by respondents are damage of ecosystem (81%) and climate change (65%), which threatens the survival of plant and animal species attractive to tourists.

5.2 Conclusion

Despite the fact that tourism industry has important contribution to the national economy, tour operators and tour guides face challenges, which threaten their sustainability in future days. Several challenges are facing the performance and existence of tour guides and operators in Zanzibar Islands. There are social, economic and environmental challenges.

The social challenges, which exist are crimes, poor health services and destruction of traditional culture. Crimes from thieves and robbery enforce tour operators and tour guides to use more mechanisms to ensure security for their clients. Once a tourist get health problem in diving, snorkelling or in any excursion, the operators and guides can only afford to provide first aid treatment.

Moreover, frequently eruption of communicable diseases like cholera made the tour companies and tour guides to use extra effort to keep their clients safe. Growing change of traditional culture to western ways of living like modern wearing and other western behaviours discourage development of cultural tourism and hence, threaten sustainability of tour guides and operators.

Economic challenges are as well diminish the long term sustainability of tourism sector. In Zanzibar, there still poor infrastructure development such as roads, water ways and accommodation sites; insufficient qualified staff and poor innovation ability.

Tour operators and guides spend many hours in travelling with their clients to reach hotels and attractive areas because of poor roads. Also, low coverage of electricity makes difficult in communicating with their clients. Insufficient professional staff enforces tour operators hire foreign experts who are demanding expensive conditionality such as large salaries and expensive accommodation, which adversely affect operators financially.

The environmental challenges which threaten the sustainability of tour operators and tour guides in Zanzibar include poor health safety condition, damage of ecosystem and climate change. Poor and illegal fishing methods destroy sea environment and beaches. This lead tour companies and guides to go deep sea by spending long time to ensure their tourists enjoy diving and snorkelling.

5.3 Recommendations

Based on study results summary and conclusion, the following are recommendations:

- (i) The government is advised to cooperate with community, tour operators and guides to make sure that the security is enhanced so as to curb incidences of crimes in areas of tourist destinations. Also the government has to make sure that all tour operators and guides have legal registrations so as to prevent some criminals to get opportunity to make evils against tourists during their holiday, this will deliver good image to the tour companies and guides.

- (ii) The community in collaboration with government and other tourism stakeholders are advised to make effective strategies that will ensure the traditional culture is retained and promoted. For example, to emphasise the community to retain their traditional culture in terms of cultural wearing, traditional dancing, arts, curving, handcraft and other cultural aspects. Retaining traditional culture by the community will help to attract many tourists because it reveals the history of Zanzibar and it will add revenue to the nation and direct income to tour operators and guides. This will ensure long term sustainability of tour operations in Zanzibar.
- (iii) The government is supposed to improve infrastructures such as construction of tarmac roads, airports, telecommunication networks and ports. Also to ensure the accessibility of electricity at all time and improve social services especially water and health services in destination sites.
- (iv) All stakeholders including local government councils, tour operators, guides and the community shall maintain hygienic condition in their residential areas and areas surrounding destination sites. They should continue with effective control of environmental pollution to prevent possibility of eruptive diseases like cholera and malaria. These diseases are among the hindrance factors of visitors in destination sites.
- (v) The government must take measures to add educational institution and with different courses of tourism industry. Also through Ministry of Education and Vocational Training Education can create curriculum starting from secondary education to high learning institutions. This will help to prepare youth towards

employment opportunities and to acquire knowledge and skills which help them to be qualified and have ability to innovate in their employments.

- (vi) The government in collaboration with other development partners are advised to deal with environmental conservation and climate change mitigation in Zanzibar especially dealing with areas such as beaches, villages, Jozani forest, market areas, and illegal fishing methods so as to enhance sustainability of tourism to assure sustainable tour operations and guides.
- (vii) Skills on tourism and tour business are recommended to be regularly provided to staff of tour companies. Tour guides and other staff are advised to attend more training related to tourism business to enhance their capacity to work in tourism industry.
- (viii) The government is advised to amend and exercise its laws and regulations so as to make them strong to value tourism industry. Tourism sector should perform its role in adherence to laws and regulations supervising tourism development and tour operations so as to protect the environment and improve socio-economic infrastructures. This will help to ensure sustainability of tour guides and tour operators in Zanzibar.

5.4 Recommendation of Future Research

The study suggests further research regarding impacts of tourism industry on youth's livelihoods in Zanzibar Islands. Such a study will provide important information regarding the role of tourism in promoting socio-economic welfare among youths since the youths are mostly facing employment opportunities and other livelihood assets.

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APPENDICES

Appendix I: Questionnaire for Tour Guides and Tour Operators

Questionnaire number

Type of tourist activities Tour guide () Tour operator ()

1. Age groups of the respondent 18- 25 () 26 - 35 () 36 – 45() 46 – above ()

2. Sex of the respondent

a) Male () b) Female ()

3. Marital status of the respondent

a) Married () b) Not yet married () c) Other (specify).....

4. What is your education level?

a) No formal education () b) Primary education ()

c) Secondary education () d) Tertiary education ()

5. What is the number of your dependents in your household?

6. Have you spent most of your life time in Zanzibar?

a) Yes () b) No ()

7. When did you start working in tourism sector?

8. What is the nature of your employment?

a) Self-employment () b) Employed ()

9. If you are a tour operator, what kind of services do you provide in your company?

Please, use the table below to answer that question.

S/N	Tourist activities	Service offered (use a tick V)
1	Diving	
2	Driver guide	
3	Snorkeling	
4	Reservation	
5	Marketing	
6	Internet service marketing	
7	Other (s) (specify)	

11. Are you satisfied with your capital?

a) 1= satisfied b) 2=Not

12. What is your capital?

a) less than 10 m (b) 10-20 m (c) 20-40 (d) more than 50 mil

13. Are you satisfied with the improvement of your monthly salary?

a) 1=Satisfied () b) 2=Not satisfied ()

14. What is your annual income?

a) less than 20 m b) 20-40 m c) 40-50 m c) more than 50 mil

15. Does the number of qualified staff in your organization satisfactory?

a) 1=Satisfactory c) 2=Not Satisfactory ()

16. Do you have access to on job training?

a) Yes b) No ()

17. Is your job innovative ability satisfied?

a) 1= Satisfied c) 2=Not satisfied ()

18. Are you satisfied with your planning skills?

a) 1= satisfied b) 2=Not satisfied

19. Are you satisfied with health and safety conditions in your working place?

a) 1= satisfied b) 2=Not satisfied

20. Does the actions taken to prevent environmental pollution including conservation of natural resources and cultural heritage satisfied?

a) 1= satisfied

b) 2=Not satisfied

21. How do you rate the extent of crimes against tourists?

1- low2 High..... ()

22. Are road infrastructures supportive to tour operations and guiding?

a) Yes

b) No

()

23. How do you perceive the sustainability of your tourist activities?

a) Sustainable

b) Not sustainable

()

Appendix II: Questionnaire for Community Members

Questionnaire number

1. Age group of the respondent 18- 25 () 26 - 35 () 36 – 45() 46 – above ()
2. Sex (Gender) of the respondent
 - a) Male () b) Female ()
3. Marital status of the respondent
 - a) Married () b) Not yet married () c) Other (specify).....
4. What is your education level?
 - a) No formal education () b) Primary education ()
 - c) Secondary education () d) Tertiary education ()
5. Have you spent most of your life time in Zanzibar?
 - a) Yes b) No ()
6. Do you work in tourism sector?
 - a) Yes b) No ()
7. What is the nature of your employment?
 - a) Self-employment b) Employed ()
8. Explain environmental challenges in the community from tourism?
 - i. Health service and safety to tourist's areas? a) Good b) bad ()
 - ii. Prevention measures taken to preserve environmental pollution caused by Tourism is enough? a) Yes b) No ()

9. What social challenges do society affected from tourism?

i. To what extent of the crimes for the tourists face?

a) Low

b) High

$$(\quad)$$

ii. how traditional culture is developed now days?

a) Good

b) bad

10. Staffs engaged on tourist operations and guides are qualified in their daily activities? a) Yes b) No

b) No

If No, Why?

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11. What is your opinion towards tourism activities?

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Appendix 3: Interview Questions for Authority Organ Officers

1. Are all tour operators and tourist guides legally registered? If not, who are majority, registered or unregistered?
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2. In relation to question 1, for those who are not yet registered (if any), what are the reasons which make you not registered?
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3. For those registered do you perform your activities on standard level?
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4. What measures does your institution take to help tour operators and tour guides to develop?
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Appendix IV: Interview Questions for ZRB and TRA

1. How tour operators and tourist guides contribute to the national income?
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2. Are many registered companies paying revenue as directed?
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3. What measures does your institution take to help them to develop?
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4. Do you face any problem in collection of revenue from tour operators and tour guides? Please justify the problem (if any).
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