

Linkages at Tourism Destinations: Challenges in Zanzibar

Wineaster Anderson

Department of Marketing, University of Dar es Salaam, Tanzania

Saleh Juma

Ministry of Agriculture and Natural Resources, Zanzibar, Tanzania

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Abstract

■ This study explores challenges facing the linkages between the tourism industry and local suppliers at the destinations. During 2010 surveys involving hotel and restaurant operators, local suppliers and tourists were conducted in Zanzibar. Qualitative analysis of the perspectives of the respondents reveals the multitude of constraints. From operators, the main constraints include poor quality of the locally supplied products, business informalities, high transaction costs and violation of agreements by local suppliers. Low production levels, low prices offered by hotels and restaurants coupled with late payments for the products delivered were the most serious problems cited by local suppliers. There is also a certain degree of mistrust between the local suppliers and the operators. However, the source of the tourism products consumed in the hotels or restaurants was not a point of concern, at least from the tourists' perspective. Strategies to bridge the demand-supply gaps in order to maximize the benefits of tourism, among the tools for fighting the rampant poverty, have been recommended.

Key Words:

Local Linkages, Tourism Industry, Local Suppliers, Zanzibar

Resumen

■ Este estudio explora los retos vinculados entre la industria turística y los proveedores locales en las destinaciones. Durante el 2010 se realizaron estudios en Zanzíbar entre los tres grupos involucrados: hoteleros y restauradores, proveedores locales y turistas. El resultado del análisis cualitativo de las perspectivas de los encuestados revelan una multitud de coacciones y restricciones. Para los operadores la mayor restricción serían la baja calidad del producto local, la poca formalidad en los negocios, el alto nivel de costes y el incumplimiento de acuerdos por parte de los proveedores locales. El bajo nivel de producción, los bajos precios ofrecidos por los hoteleros y restauradores, en combinación con el pago tardío por los productos suministrados, representan los problemas más serios comentados por los proveedores locales. Existe también un cierto grado de desconfianza mutua entre proveedores locales y operadores. No obstante, desde el punto de vista del turista, el origen de estos productos consumidos en los hoteles y restaurantes, no resulta ser una gran preocupación. Se recomiendan estrategias que unan el desequilibrio entre oferta y demanda con el objetivo de maximizar los beneficios turísticos como método para combatir la intensa pobreza.

Palabras clave:

vínculos locales, industria turística, proveedores locales, Zanzíbar

Introduction

■ Tourism industry involves hosts of linkages within destinations. The potential benefits of this industry to the development of local economic sectors, through local linkages, have been widely acknowledged (e.g. Telfer, 2000; Goodwin & Bah, 2003; Mitchell & Page, 2005; Ashley, Goodwin, McNab, Scott & Chaves, 2006; Meyer, 2006; Mitchell, 2006; McBain, 2007). The expansion of local linkages connotes the increase of usage of other sectors at the destination which stimulates the economy as a whole and creates synergy effects between different sectors of the economy. The concept of local linkages has been defined generally as the mechanisms through which, businesses build economic links with residents in their local economy (Pattullo, 1996). Focusing on a sector specific, Ashley, Goodwin & Roe (2002) refers to the linkage between tourism and the local agricultural sector as a situation in which each of the two sectors benefits from each other's activities. In many destinations, though, local linkages have failed due to a numerous challenges that confront the tourism industry.

The most recognized challenges facing the tourism industry, particularly in developing economies include poor infrastructure, poor product development and management, poor marketing, poor linkages within local economy, poor institutional and technical capabilities, and shortage of appropriate and specialized core and skilled personnel (Mitchell, 2006). In most cases, islands are characterized by smallness and external dependence; and therefore, most of the requirements are imported to meet the needs of the residents and tourists. This is also supported by Lundgren (1973) who found that hotel-generated importations in many Caribbean resorts were due to the lack of ability of the local economy to meet the hotel demands and many other challenges experienced in the tourism destinations.

Sometimes, though, tourism providers prefer to source their input wherever they can to take advantage of already-known suppliers, take advantage of bulk purchasing discounts, reliability of supply, the quantity and quality of supplies or to cater for tourists' tastes (Belisle, 1983; Goodwin & Bah, 2003; Meyer, 2006). These are reasons given by Oppermann (1993) who found that formal sector in the Caribbean tourism operations entails high leakages in the form of large imports of food and other items to meet the tourists' preferences; or Torres and Skillicorn (2004) and Momsen (1998) who show that, massive importation of meat by the Caribbean resorts were due to the demand of tourists who prefer the grain-fed flavour of the US beef; and Abdool & Carey (2004) who found that lack of varieties and small range of products were among the main reasons indicated by

hotels in Tobago for not sourcing food from local suppliers. Generally speaking, of critical importance in the development of tourism is the need to focus on pro-poor tourism strategies in order to address the rampant poverty facing these countries. There is need for a systems and innovative analyses to identify opportunities for inclusive and sustainable tourism development. Analysis of the value chains to identify linkages with the rest of the local economy is of paramount importance at this stage.

Like most islands found in the Caribbean destinations, the Zanzibar archipelago which is a semi-autonomous state within Tanzania, located in the Indian Ocean, is highly characterized by smallness in land size coupled with external-dependent economy. This Archipelago relies heavily on agriculture; with the majority of its citizens making their living from subsistence farming and fishing. However, following the decline of clove production and the fall of its price in the international markets in the early 1990s, Zanzibar has adopted tourism as a priority sector for its economic growth. Hence, tourism accounts for over 51% of its GDP (Steck et al., 2010). The annual tourist arrival has increased from 86,918 in 1999 to 134,919 in 2009 (Table 1). Europe is by far the most important market and accounts for around 75% of tourist arrivals. Italy alone accounts for over one third of all direct arrivals in Zanzibar. This is largely due to increased direct flights from Italy to Zanzibar together with the creation of all-inclusive resorts hotels. The UK market makes 10% of international arrivals. South Africa, USA and Scandinavia are also becoming important markets for Zanzibar tourism.

Unfortunately, the gain due to increased tourist arrivals may be offset by losses both in terms of revenue leakage and failure to involve the local people in meaningful activities that would help in the improvement of their welfare. Poverty rates in Zanzibar are more than 50% according to Revolutionary Government of Zanzibar (RGoZ), (2007). In recognition of this challenge, Zanzibar has launched several measures intended to tackle it including the adoption of the Zanzibar Strategy for Growth and Reduction of Poverty commonly known as MKUZA which advocates for inter-sectoral linkages (Revolutionary Government of Zanzibar, 2010). In addition, most of the government policies related to tourism development, for example The Zanzibar Tourism Master Plan 2003 (United Republic of Tanzania (URT), 2003); Zanzibar Tourism Policy Statement 2003 (RGoZ, 2003a), the Strategy for Half a Million Tourists in Zanzibar of 2005-2014 (RGoZ, 2005) and Zanzibar Strategy for Growth and Reduction of Poverty commonly known as MKUZA (RGoZ, 2010), have been formulated based on the assumption that the economic benefits of tourism would stimulate the development of other economic sectors through increased demand for

local agricultural commodities. However, despite these positive intentions by the government and other key stakeholders, the linkage between tourism industry and the local suppliers is not encouraging.

On one hand, tourism supply is growing extensively in the archipelago, evidenced by the development of about 349 registered hotels with 7,009 rooms and 13,198 beds as Table 2 summarizes (Zanzibar Commission for Tourism, 2010). But on the other, there has particularly been a concern that many hotels and restaurants import a substantial amount of their food requirements (Zanzibar Association for Tourism Investors-ZATI, 2009; Zanzibar Business Council, 2009; Anderson, 2011a; Steck, Wood & Bishop, 2010). In order to realise the positive impact of the tourism sector on poverty reduction, it is necessary to create a strong linkage with other economic sectors, particularly the agricultural sector. The linkage between tourism and local suppliers of agricultural commodities is constrained by many barriers ranging from demand and supply related to legal and constitutional factors (see for example Belisle, 1983; Torres, 2003; Meyer, 2006).

This study, therefore, proposes a case for the need for more local linkages by revealing the challenges on the linkages between the tourism industry and local suppliers in Zanzibar. To achieve this objective, the paper is organised as follows: the literature review part comes before the methodology, then followed by the findings and finally the conclusion is given.

Literature review

■ In order for the tourism sector to play a bigger role in poverty reduction in a destination country, it ought to be developed in a manner that enables its effective integration into the local economy. It thus serves as a development medium for other local activities particularly the agricultural sector. However, in many developing destinations, developing tourism in this manner has not been easy. Studies (including Driscoll, 2005; Torres, 2002; Telfer, 2000; Torres & Skillicorn, 2004) have listed a number of challenges that should nevertheless be over-

Table 1: Total arrivals by Country/Region: 1985-2010

Year	Italy	UK	Rest Europe	Total Europe	Rest Africa	North America	Rest of the World	Total
1985	4,392	1,952	10,027	16,371	339	2,230	428	19,368
1990	4,345	5,584	17,398	27,327	2,836	5,173	6,805	42,141
1995	8,922	10,391	18,882	38,195	6,680	5,173	6,367	56,415
2000	25,764	16,307	29,368	71,439	8,718	8,048	8,960	97,165
2005	49,978	12,963	32,241	95,182	14,098	7,225	8,938	125,443
2010	42,452	13,414	39,121	94,987	18,265	12,101	11,573	136,926

Source: Computed from the tourism database of the Zanzibar Commission for Tourism (2011)

Table 2: Distribution of Accommodation Capacity in Zanzibar in 2009

Place	Registered Establishments	Rooms	Beds
Unguja			
North & East Coast	91	3,167	6,219
South & East Coast	106	1,732	3,159
Stone Town & Ng'ambo	85	1,134	2,057
Suburb Town Vicinity	48	764	1,351
Pemba	19	212	412
TOTAL	349	7,009	13,198

Source: Computed from the tourism database of Zanzibar Commission for Tourism (2010).

come in order to enable the linking of tourism with local suppliers of agricultural commodities. These have been grouped into demand, supply, and institutional and legal related challenges.

Demand-related Challenges

Usually tourist hotels and restaurants require high quality products to meet the requirements of their highly selective customers. If the tourist hotel does not have confidence in the environment where food is produced, it will be more likely to import its food products (Driscoll, 2005). Demand for local foodstuffs in tourist hotels and restaurants can be influenced by a number of factors including hotel characteristics, the maturity of the tourism industry, types of tourists, types of tourism, promotion of local foods, the concerns over food safety and health, training and nationality of chefs, seasonality of tourism, informal nature of smallholder suppliers as well as unhygienic and unhealthy post slaughter handling.

Size of hotel, class and nationality of the owner can influence the decision of a tourist hotel to source agricultural products from either local or foreign suppliers. Larger size and high class hotels owned and/or managed by foreigners are less likely to source their food items locally; compared to the smaller and lower class hotels owned by locals (Belisle, 1983). Probably it is due to the fact that high class hotels receive high class customers, who require high quality food items that sometimes cannot be sourced locally (Meyer, 2010).

It has also been argued that foreign hoteliers might have established business relations with suppliers in their home countries and therefore want to maintain the relationship. To confirm this, Meyer (2010) found that most South African owned hotels in Zanzibar prefer to source their processed foods and beverages from South Africa. Likewise Kenyan and Italian owned hotels import their requirements from Kenya and Italy respectively. To expand the issue further, some of the big hotels in the developing countries are just extensions of groups of hotels abroad (Telfer and Wall, 2000). In such cases hoteliers buy for several hotel branches from foreign suppliers thereby enjoying cost saving from bulk purchase. Other studies have not found any differences in demand for foods between hotels with different sizes, nationality of owner/manager and hotel classes (see Torres, 2003). Instead, Torres (2003) associates the disparity in food demand between hotels of different characteristics with the way in which tourism has been planned in the destination country.

Moreover, the maturity stage of the tourism industry is also said to have an influence on the demand for local foods. However, contrary to what is stipulated in Lundgren (1973:15)'s models which state that, "as hotels become more established, over time they tend to increase use of local product". Torres (2003) argues that the more a tourism industry matures with a high number of tourism arrivals, the more likely to use imported foods. Torres's viewpoint is more applicable in small islands that lack adequate land resources and capacity to feed both locals and visitors (Anderson, 2008). Likewise, different types of tourism offer dissimilar possibilities on linking tourism with other local sectors. McBain (2007) noted that high income tourism operated by five stars hotels and villas which provide high quality and expensive foods is less likely to source foods locally.

Similarly, mass tourism requires bulk supplies of foods which are more likely to be sourced through imports. On the contrary, in ecotourism, culture and community tourism, the tourists are more likely to use locally produced food stuffs as part of their experience in the destination country (Mc Bain, 2007). Anderson, Juaneda & Sastre (2009) and Anderson (2010)'s findings for instance, show that enclave tourism has the least contribution to local economy as compared to the rest of travel modes as most establishments offering the former kind of tours tend to import more. However, some tourists are conservative with the types of foods that they are familiar with rather than experimenting different types of foods (Pattullo, 1996; Momsen, 1998). This is due to the fear to try new foods and sometimes concerns over food related illnesses. However, Torres (2002) contended that tourist food consumption and preference do not necessarily represent a significant obstacle to promoting linkages between the local agricultural sector and the tourism industry.

In order to create linkages between tourism and local suppliers of local agricultural products, foods must be produced in a safe, sanitary and healthy environment that ensures high quality food product. Most tourists, particularly those visiting the developing countries, are cautious of the gastro-intestinal illness (Torres & Skillicorn, 2004). This concern could lead some hotel chefs to avoid purchasing locally produced foods because they perceive such foods (including beef and chicken meats) to be unsanitary and inferior (Driscoll, 2005). This perception adds to the barriers that constrain the creation of linkages between the tourism industry's demand for foods and local agricultural production.

The nationality of hotel owners and managers is said to be another factor that influences a hotel's acceptance of local products as suggested by Ashley (2006), Momsen (1998) and Pattullo (1996). The authors found that a hotel

managed by a local with the kitchen run by a local chef is more likely to demand locally produced food items than the hotel with expatriate or internationally trained chefs. According to Pattullo (1996) expatriate chefs prefer foods that they are familiar with. They may also find imported goods more convenient (Ashley, 2006).

In many developing countries, most local food suppliers are small scale and informal by nature. They pay no tax and therefore cannot provide formal receipts required by formal hotels (Telfer, 2000; Meyer, 2006). This factor makes individual small scale producers unsuitable as suppliers of food items to the hotels. In addition, local suppliers may lack the distribution infrastructures. For example, meat distribution requires refrigerated trucks or well packed boxes, which usually are beyond the financial muscles of most small scale and informal suppliers. Telfer and Wall (1996) suggest that joint ventures between local suppliers and hoteliers to buy expensive post slaughter infrastructures could provide a possible solution.

Supply-related Challenges

Normally, hoteliers select food suppliers basing on the types of production systems, accessibility of local supplies and the ability of a particular supplier to meet the specific needs of the hotels in terms of quality, quantity, consistence, price of local products, level of technological innovation and the likes (Telfer, 2000; Torres, 2003; Meyer, 2006; Ashley, 2006). Some of the known factors that hinder the supply of local agricultural products to tourist hotels include scale of production, accessibility of local supplies, quality, lack of information, lack of technical know-how, price of local produce, the terms of payment, marketing related constraints and mistrust. However, smallholder local suppliers may only manage to supply a small quantity of produces and the volume that could be purchased is therefore limited. They are often unable to achieve economies of scale in production and marketing related activities.

It is generally known that different agricultural commodities require different agro-climatic requirements; thus some crops or certain breeds of animals cannot be produced successfully in some destinations. Therefore, hotels in these areas need to rely on imported foods. The problem is more pronounced in small island countries. For instance, few varieties and small range of products was found to be among the main reasons indicated by Tobago hotels for not sourcing food from local suppliers (Abdool & Carey, 2004). The aspect of quality is probably the most pronounced factor constraining the supply of local beef and chicken meats to tourist hotels and

restaurants. Torres (2003) reported that Caribbean countries imported a lot of beef meat; most of it were beef prime cuts imported from USA because it was preferred by American tourists due to its grain-fed flavour. In order to produce high quality meats there should be appropriate infrastructures for slaughtering, transportation and storage of these products.

Furthermore, just like other agricultural products, local suppliers of meats may not link with tourist hotels and restaurants because of the lack of awareness of the existence of such trade opportunities. The informed supplier is better able to bargain on a level playing field with customers instead of being cheated by the middlemen on matters pertaining to price and quality of their produces (Bahigwa, 2006; Mukhebi, 2004). However, Abdool and Carey (2004) noted that both, namely, the hotel industry and local suppliers, need information on the quantity, quality, variety and usage of goods in demand in order to plan production, harvesting and distribution schedules to bring about harmonization of the supply and demand parameters and make it responsive to the dynamics of the tourism industry on a year-round basis. In some cases, the potential suppliers may also lack the necessary technical know-how particularly that related to post slaughter handlings. Many developing countries have limited capacities to process agricultural products (including beef and chicken meats) to make them available for tourist consumption (Meyer, 2006). There can also be a lack of technical know-how in production methods and marketing skills (Abdool & Carey, 2004).

The selling price of a given product is among the important factors in making the buying decision. For instance, in Tobago, price was found to be the most critical factor, with hoteliers showing that they would always prefer to deal directly with local suppliers in Tobago and would support initiatives if the price of local supplies is reduced (Abdool & Carey, 2004). Small scale producers though do not enjoy the economies of scale in both production and marketing and they are generally incurring high production and marketing costs (Meyer, 2006). Therefore, their selling price could definitely also be high. As a response, it is possible for local products to be devaluated by cheap imports (Ashley, 2006).

Furthermore, the long period taken to effect payment could make small farmers (who lack adequate capital) inappropriate as suppliers (Ashley, 2006). A small scale producer fits well with business arrangements that allow the supplier to be paid within a few days; so that one can have the capital to supply goods as agreed. However, the provision of working capital in terms of credit would enable smallholder producers to match with the hotel payment arrangement. There can also

be no operating market that would bring local producers in touch with hotel and restaurant operators to exchange information, negotiate contracts and execute business transactions.

Solving the information-related problems may be difficult as very often, small scale suppliers in developing countries compete with each other instead of pooling together their marketing efforts as a cooperative or alliance (Meyer, 2006). If they could cooperate, it would increase their access to the market in the tourism businesses that require quality products, large volumes as well as consistent supplies. Related to that is that small scale producers are believed to have inadequate marketing skills and techniques such as niche marketing and strategic planning. They are also short of important marketing information (Meyer, 2006). Consequently, they often market their produce through middlemen who are normally more skilled and better informed than themselves (Bahigwa, 2006). Last but not least, the existence of mistrust between the hoteliers and local suppliers has been reported (see for example Meyer, 2006; Torres, 2003). The mistrust and the lack of communication between hoteliers and small scale producers are often associated with socio-economic and cultural differences between the two parties.

Legal and Institutional-related Challenges

Legal- and institutional-related challenges are an additional important concern for the tourism industry. This, significantly, leads to the inability of small local suppliers to meet the needs of large hotels and resorts. Theoretically, hotels could secure to a certain extent a regular supply of food items locally by establishing contracts with farmers and giving them incentives such as production inputs on credit. The experience of Indonesia has shown that when the contract is done successfully both parties benefit (Telfer & Wall, 1996). In this special case the executive chef of the hotels carefully investigated the potential use of local products and established agreements with local suppliers. Thereafter, step by step, through regular communication, quality standards were set and adopted by the local suppliers.

Adherence to the agreed terms and conditions in the contracts is another area of concern. In this, small-holder suppliers are usually vulnerable to liability of defaulting on contracts with hotels. It is logical that if the hotel's quoted price is lower than the prevailing market price; local suppliers cannot respect the contract. Again, if a local producer is unable to supply a hotel the agreed quantity and at the right time, the producer can be held legally liable for the damage

caused. However, once a hotel sues the local supplier on this ground, it will be difficult to establish contracts with other local suppliers in the future. This type of scenario is often motivating the hotels to buy imported food items. But also, the informal nature of local producers makes it very difficult to establish formal contracts with tourist hotels. In this case, Meyer (2006) suggested that signing contracts with a well organized group of suppliers may help to ensure continuity and respect of the agreements rather than reliance on the commitment of one supplier.

In a country where small scale farmers have been linked to hotels and restaurants, normally there used to be a strong institutional support that looked at the whole range of tourism-agriculture linkage holistically; rather than addressing individual constraints (Kindness & Gordon, 2001). In St. Lucia for instance, the government created what is known as "the St. Lucia Heritage Tourism Program" which is responsible for evaluating food products purchased by the island's tourism industry so that local producers can increase their share of the market (Driscoll, 2005). It also facilitates local producers to make their production and marketing decisions (Kindness and Gordon, 2001). The facilitating role of the institution involves the development of policies, regulations and strategies that can ensure agricultural commodities, such as beef and chicken meats, produced for tourist hotels and restaurants consumption comply with food safety regulations (Driscoll, 2005).

The institutional factors which constrain the marketing of local agricultural products to tourist hotels as identified by Ashley (2006) include lack of institutional focus, weak market links and failure to promote local foods. More specifically, the lack of focus on how to diversify the tourism experience away from 'beach and adventure excursions' to culinary, or farm-based tourism may also constrain the supply of local agricultural to tourist hotels. To a large extent this is caused by the misalignment of agricultural development interventions with the tourism development process (Torres, 2003).

If local products are not supplied through a wholesaler or producers' association, procurement from a number of smaller suppliers may be a hassle for the hotelier or restaurant operator. Formation of cooperatives/alliances of food producers and/or distributors with their own quality standards and quality control mechanism may guarantee that the commodities supplied are of the acceptable quality. This would increase the capacity of local producers as suppliers to tourist hotels and restaurants. The public sector has a big role to play in the promotion of local foods for tourist consumption through conducting regular meetings with hoteliers (Meyer, 2006). It is

suggested that the outcome of these meetings would help to guide both suppliers and hoteliers on the matters pertaining to demand, quality standards and price for various agricultural commodities. Public institutions would also help in providing training and information on the various aspects of food quality.

To that end, Table 3 summarises the challenges on local linkages based on the literature review.

Methodology

■ As it has been mentioned before, various studies indicate that linkage between tourism and local suppliers face challenges related to demand and supply as well as institutional practices (Driscoll, 2005; Torres, 2002; Telfer, 2000; Torres & Skillicorn, 2004). Borrowing from this knowledge, and taking Zanzibar as a case study, we focus on the linkages between the tourism industry and

Table 3 Challenges on Linkages at Tourism Destinations

S/N	Demand-Related Challenges	Supply-Related Challenges	Institutional & Legal-Related Challenges
1.	High quality products to meet the requirements of highly selective customers	Inadequate marketing skills and techniques	Adherence to the agreed terms and conditions in the contracts
2.	Inadequate promotion of local foods leading to unawareness of their existence	Conflicting terms of payments between buyers & sellers	Inability to supply the agreed quantity and at the right time
3.	The consumer concerns over food safety and health	High asked prices of local products	Inability of small local suppliers to meet the industry needs-quality standards
4.	Lack of training to national employees leads to foreign recruitment; which eventually results to foreign product preferences	Mistrust and the lack of communication between buying and selling parties	Institutional development of policies, regulations and strategies that can ensure conformity to healthy and safety regulations
5.	Types of tourists and tourism determines types of product requirements	Inadequate information on the quantity, quality, variety and usage of goods in demand	Lack of institutional focus, weak market links and failure to promote local products
6.	The maturity of the tourism industry	Low level of technological innovation and scale of production	Formation of cooperatives or alliances which guarantee the acceptable quality of the commodities supplied
7.	Seasonality of tourism	The inability of a particular supplier to meet the specific needs of the hotels in terms of quality, quantity, consistence, price of local products	Provision of training and information on the various aspects of product quality by public institutions
8.	Informal nature of smallholder suppliers at the destination	Inaccessibility of local supplies	
9.	Unhygienic and unhealthy post slaughter handling of local butchereries	Crude and poor production systems	

Source: Constructed in this study based on empirical studies

livestock sector (particularly, the local beef and chicken meats). The decision to focus on beef and chicken meats in this study is based on the evidence reported by the Zanzibar Association of Tourism Investor (2009) that beef and chicken represents the worst cases in term of proportion of the commodity used by hotels in Zanzibar.

In this, it was indicated that only 10% of beef and chicken meat consumed in local tourist hotels and restaurants were sourced from local suppliers, while the rest (i.e. 90% is sourced from outside Zanzibar). Besides, there has been no study conducted to identify factors constraining the linkages between tourism and local suppliers of specific agriculture commodity in Zanzibar. The previous studies on value chain analysis such as Steck et al. (2010) and Anderson (2011b), focused on the entire value chain in Zanzibar tourism, instead of commodity approach that would focus on the constraints on linking tourism with particular agricultural commodity. Using a sectoral approach entails ignoring the diversity of the sector and the varying nature of commodities within the sector that cannot be treated equally. That is, different commodities require different techniques for handling; hence the linkage constraints for one commodity might also be different from others. Thus using a commodity approach to study factors constraining the linkage between tourism and local suppliers is important both practically and theoretically.

This study is in-line with the Zanzibar Livestock Policy draft (Revolutionary Government of Zanzibar, 2009), which acknowledges the fact that currently the livestock sector lacks appropriate marketing avenues, quality standards, assurance and control system and thus it advocates for investment in value addition for livestock products and promotion of formation of strong livestock producers, traders and processors' associations. The main attention in the recent has been directed towards linking the livestock sector with the booming tourism industry in order to benefit individual Zanzibaris as well as the Zanzibar economy in general. This assumption has also been verbally supported by the Zanzibar Association of Tourism Investors (ZATI) chairperson who

expressed the interest and willingness of ZATI members to use locally produced foodstuffs. In particular, when giving his welcoming note in the ZATI progress report 2009-2010, the ZATI Chairperson plausibly said:

"We certainly need better food security – not just to be able to be less reliant on imports to feed ourselves, but to satisfy the requirements of a growing hotel industry. In addition, a common unit of mutual benefit will be of assistance to help villagers to participate in small scale farming, building a strong network with investors around their respective areas by being able to sell their products and setting up advisory council which can guide them toward the demands of the tourism industry". (ZATI, 2009:4)

The livestock sector is an important economic activity in rural Zanzibar. The sector includes keeping of dairy and beef cattle, goats and poultry among others. It is estimated that about 37.8 % of agricultural households are engaged in livestock production activities. In most cases livestock are kept to provide a safety-net during times of financial hardship. The Isles has a significant potential for market-led commercialization of the livestock sub-sector, driven by domestic urban demand and the increasing tourist investments. In 2009 the livestock sub-sector contributed to about 4.5 per cent of Zanzibar's GDP; which is about 14.6 % of the total agricultural share in Zanzibar GDP (Revolutionary Government of Zanzibar, 2009).

Despite its importance, the sector's potential is under-utilized, and the archipelago has large deficit in livestock products which is addressed by import. Available data show that about 91 percent of livestock products consumed in tourism sector are imported; with 70 per cent of beef meat consumed in Zanzibar coming from Tanzania mainland. The remaining requirements in chicken and beef meats are mainly imported from South Africa, Kenya and Brazil (Department of Livestock Development, 2010; ZBC, 2009).

Locally, there are three supply lines of beef and chicken meats: from within Zanzibar (see Table 4), from Tanzania Mainland and outside Tanzania. The low adoption of

Table 4 Estimated beef and chicken meats production - in Zanzibar in tons (2004-2010)

Products	2004	2005	2006	2007	2008	2009	2010
Beef meat	1,256	1,772	1,584	1,766	1,650	1,266	1,392
Chicken meat (layer & broiler meat)	255.6	297.8	308	292	333	353	302.8
Local (indigenous) Chicken	1,071	1,103	1,136	1,170	1,245	1,282	1,274

Source: Department of Livestock Development (2011). Supply Utilisation Assessment 2000-2010: 38

improved production technologies, unorganized market outlets and lack of value addition have been mentioned in the RGoZ(2009) as among the main constraints facing livestock development in Zanzibar. Besides, the current tourism activities in Zanzibar are guided by the Promotion of Tourism Act (1996), the Zanzibar Tourism Master Plan (URT, 2003), Zanzibar Tourism Policy Statement (RGoZ2003b), and the Strategy for Half a Million Tourists in Zanzibar 2005-2014 (Revolutionary Government of Zanzibar, 2005). All these documents declare explicitly the desire, and the need, to effectively link tourism with agriculture and other economic sectors.

In-line with the efforts invested on creating local linkages between tourism and local livestock sector, this study intends to respond on the following questions: What are major constraints associated with sourcing beef and chicken meats locally? What are opinions of the tourists towards the local beef and chicken products? What are the main supply related problems encountered by local suppliers to tourist hotels and restaurants as well and difficulties feared by those who are hesitant to supply to tourist hotels and restaurants?

To respond on the research questions, interviews which involved 78 hoteliers and restaurants, 105 tourists and 94 local suppliers of beef and chicken meats were conducted between January and June 2010. The target respondents in the hotels and restaurants were procurement officers, managers or any member of buying centre in the respective hotels. The study covers three out of four existing tourism zones in Zanzibar; the zones under study are in Unguja Island, namely Stone Town and Suburbs, North-East Coast, and South-East Coast. See Map 1, which show the tourism concentration zones in Zanzibar. Moreover, the list of beef butcheries and suppliers of chicken meat was obtained from the meat inspection unit of the Ministry of Livestock and Fisheries Development-Zanzibar. The majority of local suppliers were interviewed at Darajani and Mwanakwerekwe central markets, while few of them at their localities. About two thirds of respondent tourists were sampled at the Kizimbani Spice Farm, a famous area for Spice Tours in Zanzibar, and the remaining one third were interviewed in Stone Town area. The next section presents the findings.

Findings

■ This section analyses the challenges as perceived by the tourism actors including hotels and restaurants, local suppliers of beef and chicken meats in Zanzibar and the tourists visiting Zanzibar who are the target client in the tourism industry.

Challenges as perceived by hoteliers and restaurant operators

On average, in Zanzibar, the number of tourists accommodated in a single tourism establishment is about 5000 tourists annually with the average length of stay per tourist being between 7 and 13 days. When hoteliers and restaurant operators were asked to indicate the number of years they have been in operation, the majority (i.e. 60%) reported to be in operation for between 5 and 15 years; which suggests that many hoteliers have experience in the local environment. The relevance of this information is in-line with the Lundgren (1973)'s models on the maturity of the establishment vis-à-vis local procurement; while the Torres (2003)'s viewpoint is more applicable in Zanzibar that lacks adequate land resource and capacity to feed both locals and tourists leads to more importation.

The nationality of hotel owner and manager is said to be another factor that influences the hotel's acceptance of local products as suggested in Torres (2003), Momsen (1998) and Pattullo (1996). It was found out that a hotel managed by a local and operated by local chef is more likely to demand locally produced food items than the hotel with expatriate or internationally trained chefs. Pattullo (1996) also found that expatriate chefs prefer foods that they are familiar with in their preparation. The findings show that 44 % of hotels were owned by Zanzibaris, 6 % by people from Tanzania mainland; and 50% by foreigners. Similarly, 41% of the interviewed hotels were managed by Zanzibaris, 15% by Tanzania mainlanders, while 43 % were found to be managed by foreigners.

With regard to the use of beef and chicken meats from local suppliers, about 60 % of the interviewed hotels indicated that they use beef and chicken meats from local suppliers. The findings reveal further that the average daily requirements per hotel during high seasons are 15 kilograms of beef, 28 kilograms of sea foods and 18 kilograms of chicken. However, the local sourcing for beef meat is about 7% of the requirements.

Given the limited amount of local sourcing, the enquiries onto what makes the hotels not source most of their beef meats locally were posed. The results which are summarized in Figure 1 indicate that the majority of the hotels listed the poor quality of local products, high transaction costs, high level of mistrust between hoteliers and local suppliers; local suppliers violate agreements and do not offer formal receipts in addition to inconsistent supplies; and the shorter payment period demanded by local suppliers were the main constraints. The burning issue was the shortage of supply in the local market. It was com-

mon to get this response from every respondent hotel or restaurant. For example, from the hotel responses, the following common responses were recorded:

"I have experienced a problem of getting what the hotel needs from the local suppliers... if you can show me where to get enough meat to satisfy our kitchen needs, we will buy everything from Zanzibar".

Moreover, the selling price of the product was among the important factors in making buying decision, whether buying locally or outside the destinations. This was not unusual. In a research project conducted by Abdool and Carey (2004) in Tobago, price was found to be the most critical factor and, all interviewed hoteliers in Tobago reported that, they would always prefer to deal directly with local suppliers and would support initiatives if the price of local supplies is reduced (Abdool and Carey, 2004). Small scale producers do not enjoy the economies of scale in both production and marketing and they are generally incurring high production and marketing costs (Meyer, 2006; 2010). Therefore, their selling price could be also high. On the other hand, it is also possible for local beef and chicken meat to be devaluated by cheap imports. This was also a major concern in Zanzibar where hoteliers complained about the prices charged by local suppliers. For example, one of the respondents pointed out that:

"Locally sourced meats are more expensive than bulk purchased equivalents imported from other place outside Zanzibar".

"The local butcher men never know how to cut the pieces of meat... sometimes they bring bones without meat... how can we buy bones without meat?"... "I think they want to get more money by selling more bones"

Many developing countries have limited capacity to process agricultural products (including beef and chicken meats) to make them available for tourist consumption and there is a general lack of technical know-how in production methods (Meyer, 2006; Abdool and Carey, 2004). The local suppliers in Zanzibar lack the necessary technical know-how particularly in relation to post-slaughter handlings. Most respondent hoteliers complained about this. Examples of statements include:

"The men bring meat in the bucket without proper covering... we do not know if the cow was slaughtered today or yesterday... they simply do not have refrigerated trucks. Our visitors cannot eat such kinds of meats".

Many hotels were not sourcing beef and chicken locally because they lacked confidence in the capacity of local

suppliers to meet the hotel requirements, also because local suppliers could not follow proper procurement procedures like giving receipts. In their responses, we captured statements such as:

"The local supplier may bring several chicken one month and then not be seen again for months... when they appear they end up giving unacceptable excuses including the illness of the chicken and so forth".

"She used to supply us chicken. Sometimes she brings very tiny chicken, which look like 'birds'... as a result we are forced to serve the whole chicken as a single portion, instead of two portions... that is a total loss for us".

"We are always required by ZRA [Zanzibar Revenue Authority] to show the hotel expenditure. The local suppliers never give us the purchases receipt. That works badly for us. ZRA never trusts us. Therefore we prefer buying from supermarkets and get proper receipts".

Most of the complaints could also be related to suppliers' ignorance of the needs and wants of the hotels. From what was ascertained from the hoteliers, a list of their requirements was prepared. The meat suppliers were then explicitly asked about the attributes good quality beef or chicken meats should possess in order to find out whether they were aware of the qualities needed by their potential clients. The suppliers were expected to know attributes like tenderness, size, cleanliness, low fat content, good quality cuts, proper storage and transportation in refrigerated trucks or well packed in boxes certified by veterinary doctors. The majority (57 per cent) of the meat suppliers were not familiar with most of these quality requirements. The results reveal a gap that exists between the local meat suppliers on one side and the tourism providers on the other regarding quality attributes. A possible explanation for this gap may be the lack of communication between the two parties, which may further complicated by poor business-to-business networks between stakeholders or even the lack thereof. The next section focuses on information from the suppliers' viewpoints on the same issues.

Challenges in local linkages according to local suppliers

It would not be realistic to conclude this case using demand-centred perspectives only. Therefore, the local suppliers of beef and chicken meats in Zanzibar were asked to describe their experiences in dealing with the tourism businesses. There were mixed feelings from the respondents about their relationships with the hoteliers and restaurateurs. While some were supplying to these

tourism businesses, others were not. Of the 62 local suppliers of beef, only 23 per cent indicated that they supplied to tourist hotels and/or restaurants. Likewise, it was only 25 per cent of the chicken suppliers who indicated that they were supplying to tourist hotels and/or restaurants.

When asked the problems that continue constraining the business to business relationships between their businesses and the tourism industry, suppliers had their viewpoints. For example some of the respondents have cited the problem of language, while others citing the complexities involved in negotiating with the foreign operators. Likewise they have cited the lack of trust between the two parties involved. These kinds of problems have been acknowledged in the previous studies (such as Torres (2003). According to Torres (2003), the mistrust and the lack of communication between hotelier and small scale producers are often associated with socioeconomic and cultural differences between the two parties. In Zanzibar, one respondent was even quoted saying:

"It is always difficult to trade with these wazungu [whites] as they bombard you with many words we are not familiar with, and later they ask you to sign a paper on something you do not know... I prefer to sell my product [beef] to Zanzibaris because we understand each other".

The language problem can be explained in two ways. Firstly, it can be a lack of basic education. Of the total respondents, 38 per cent had attained secondary school education, while almost half (49 per cent) had only attained primary school education. A tertiary education had been attained by only 2 per cent. Low education levels hinder basic business practice including negotiations, keeping proper records, and obtaining credit and market information. In this case, most suppliers with at least a primary level of formal education were supplying to hotels. But the ones without a formal education showed some reluctance to deal with hoteliers, especially the foreign managed hotels.

Secondly, the lack of experience in the business, and sometimes unwillingness and inability of the suppliers to learn might have contributed to the lack of trust between the two parties. Building trust between parties always requires investment in terms of time and money. The results indicate that the more experienced the suppliers were, the more likely they were to supply beef or chicken to hotels. A possible explanation is that the suppliers had studied the industry and developed working relationships with the hoteliers. Long-term positive relationships signal the existence of trust and confidence between the hoteliers and local suppliers. They also show

that the suppliers have developed appropriate mechanisms to deal with the corporate clients. A majority of respondents in this case had over 10 years of experience in the meat industry, with 26 per cent having between 10 and 15 years of experience, 27 per cent 15 to 20 years, and 22 per cent over 20 years.

The majority of suppliers mentioned the late payment they receive from the hoteliers as one of the major challenges. Many hotels and restaurants prefer a credit purchase when buying large stock, with credit terms requested by the hoteliers varying between 30 and 60 days. On the other side, most local suppliers require cash on delivery to enable them to continue with production. To beef suppliers, 30 days without cash at hand was too long as they could not afford to order the next stock. For chicken suppliers, the main issue was the money to feed the next round of supplies. The two sides - hoteliers and meat suppliers - were both concerned about how to secure the right partner and final financing of the products delivered.

Some of the local meat suppliers who were not supplying to hotels were also not considering selling to hotels or restaurants in the future. The main reason given was their lack of knowledge about the requirements of the hoteliers and restaurants, while others said that they were comfortable dealing with individual clients but they were not ready to deal with corporate clients, because of the low prices offered by hoteliers and restaurant operators. To the hoteliers and restaurants, the sales price is one of the most important factors when making the decision to buy. As a result, cheap imports from big meat exporting countries such as Kenya, Brazil and South Africa substitute local supplies in Zanzibar. However, some of the local suppliers were ready to let it go as one supplier has even said clearly that:

"If I can sell to an individual client and get my 4500 Shillings [equivalent to 3 US\$] a kilo today, why should I go to hoteliers who never buy in cash and sometimes price our products below the market price?"

Finally, when the local suppliers were asked about some complaints raised by the hotel and restaurant operators, for instance, that local suppliers did not issue receipts for the supplied products, several responses were recorded. Some openly revealed that they wanted to evade taxes upon receiving the money, thus they preferred not to give any official receipts. While some cited the lack of motivation to pay taxes to the government, others did not want to spend money on buying receipt books. In the first group, the lack of knowledge on how the taxpayers' money was spent was one of the justifications for not paying the tax.

Challenges according to tourists

As it has been captured earlier (e.g. from Belisle, 1983; Oppermann, 1993; Momsen, 1998; Goodwin & Bah, 2003; Abdool & Carey, 2004; Torres and Skillicorn, 2004; Meyer, 2006, Anderson, et al., 2009; among others), some tourists prefer to consume familiar products while abroad, and where possible, the same foods they use at their origin. An additional interesting point is the common belief, typically in the developing countries, that tourists coming from the developed world are wealthy and therefore demand high quality products. That belief leads many tourism providers in the developing countries to have little confidence in locally produced products and opt to buy these stuffs from abroad.

Trying to test this belief, while using the tourist's standpoint, this study captured the origin of tourists visiting Zanzibar as follows: 67% of the interviewed tourists were from Europe, 14% from East Africa, 11% from South Africa and only 8% were from North America. This suggests that most of the tourists visiting Zanzibar are from developed countries.

To see if the assumption in the developing countries holds any truth with regard to the preferences of the tourists from developed world visiting developing countries, the question to capture the viewpoints of the tourists regarding the foods they consume in Zanzibar was asked. Surprisingly, based on the analysis of the tourists' perspective, a high proportion (that is, more than 70%) of tourists were not sure of the source of meat they consumed during their stay in Zanzibar. They even did not bother to ask for the specification of the foods that they consume at the destination. To this end, it can be concluded that the source of the tourism products at Zanzibar was not a point of concern, at least from the tourists' perspective.

Conclusion

■ This study explored challenges on the local linkages between the tourism industry and local suppliers of beef and chicken meats in Zanzibar. Hotels encounter a multitude of problems in sourcing beef and chicken meats from local suppliers. These include the poor quality of products supplied locally, high transaction costs, and violation of agreements between suppliers and hotels, and reluctance of local suppliers to issue formal receipts. There is also a certain degree of mistrust between the two parties. Other issues are inconsistent supplies, shorter payment periods and unreliable prices. In order to realise the benefits from the tourism industry,

the meat sector could invest in production and marketing infrastructure including the construction of modern slaughterhouses.

The small size of (immature) chickens from local suppliers was another problem, to the extent that some hotels were forced to shift from their normal menu to suit the food portion provided by their suppliers. The problem is likely associated with the fact that in Zanzibar the chickens are sold in units rather than weight. Thus it is advisable to introduce the system of selling chickens by weight. Related to that was the belief that many hotels underrate the capacity of local suppliers to maintain consistent supplies of beef and chicken meat as per agreements. Even those hotels that currently source beef and chicken meats from local suppliers do so without formal contractual agreements. This is due to the fact that if they adopt a formal contracting system most of the local suppliers would fail to meet their contractual obligations or agreements. A large proportion of hotels that had stopped sourcing locally, and those that had never sourced beef and chicken meats locally indicated their willingness to source from local suppliers. Hence, there is potential for local suppliers to increase the supply of these commodities to tourist hotels as long as their production and distribution methods are substantially improved.

With regard to the local suppliers' perspective, the analysis of the results leads to a number of issues. One is that the level of formal education of the majority of local chicken and beef meat suppliers is generally low. This disadvantages them when negotiating business contracts with hotels on matters pertaining to supplying foodstuffs, such as price and terms of payment. They also face difficulties in understanding the contents of the supply contracts. Similarly, the lack or low levels of education incapacitate suppliers to keep proper records of their businesses and create difficulties in obtaining basic production services such as credit and market information. The most serious problems appeared to be late payments from the hotels and having inadequate capital. The price offered by hotels was not acceptable to many local suppliers. These findings are useful for all institutions responsible for promoting linkages between the tourism and agriculture sectors in Zanzibar. Based on the findings, we give a number of recommendations.

First, training of local suppliers on skills and techniques related to post-slaughter handlings is of paramount importance. This includes cutting, packing, transportation storage and general cleanliness and hygienic requirements. The hotels' decisions on whether to continue sourcing beef and chicken meats from local suppliers are a function of various factors, such as the quality of

the products, consistent supplies and size and availability of chicken. Thus, any program designed to promote the linkages between tourism and local suppliers of beef and chicken meats should address these problems holistically. Isolated interventions such as increasing production or improving marketing infrastructures are unlikely to succeed in this respect. There is also a need to provide at least basic business and entrepreneurship skills for local suppliers.

Second, the formation of stronger associations or networks of local suppliers would enable them to pool resources and benefits from economies of scale instead of competing between themselves. These networks could set their own quality standards and quality control mechanisms that would guarantee that the products supplied to tourist hotels were of acceptable quality. This would not only increase their capacity to supply according to the hotels' requirements, but also through their alliances they could forge effective partnerships with public institutions and donor agencies.

Third, to overcome capital constraints, local suppliers ought to be assisted to get working capital in terms of credit. This would enable them to comply with hotel payment arrangements. The establishment of a guaranteed fund specifically for local suppliers to tourist hotels would increase their access to credit from formal financial institutions. Policy guidelines could be developed alongside shifting the policy focus towards mainstreaming agricultural development interventions within the tourism development process. The focus would include diversification of the tourism experience away from beach and adventure excursions to culinary tourism.

Fourth, strong institutional support to look into the whole process of tourism-agriculture linkage could be established. The facilitating role of such an institution could involve the development of policies, regulations and strategies that could ensure beef and chicken meats produced for the consumption of tourist hotels and restaurants complied with food safety regulations. The same institution could also address the problem of mistrust, the lack of communication between the hotels and local suppliers, and the promotion of local beef and chicken meats for tourist consumption through regular meetings with hotel managers and chefs. Through these meetings the local suppliers could liaise with hotels to exchange information and determine agreements that would guide both suppliers and hotels on matters pertaining to demand, quality standards and pricing.

Finally, future studies may expand the scope of this research by deepening the analysis particularly on the

context of specific sectoral approaches, and analyse in detail the legal and institutional factors constraining the linkages between the tourism industry and local sectors in Zanzibar.

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international marketing and linkages between tourism and livestock sectors.

Contact details:

Wineaster Anderson
Associate Dean; Administration, Research and
Publication
University of Dar es Salaam Business School
P.O. Box 35046
Dar es Salaam - Tanzania
E-mail: wineaster@udbs.udsm.ac.tz

Saleh Juma
Ministry of Agriculture and Natural Resources
Zanzibar (Tanzania)
E-mail: saidsm05@yahoo.com

Biographical notes:

■ Wineaster Anderson is a Senior Lecturer at University of Dar es Salaam (UDSM), where she has been since 2001. She is also an Associate Dean in Research & Publication of the UDSM Business School. Her research interests include stakeholder perspectives and economics of tourism in developing countries, package tourism, entrepreneurship in tourism and hospitality industry, local and global networks and linkages in tourism and tourist behaviour.

■ Mr. Saleh Juma is Planning Officer in the Ministry of Agriculture and Natural Resources in Zanzibar. His research interests include tourism and poverty alleviation,