



A history and market analysis of tourism in Tanzania

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Abstract

Tanzania contains some of the world's greatest natural wonders. Following major reforms in its foreign tourism policies in the mid-1980s, tourism has increased to become the nation's second leading foreign exchange earner. Tanzania is a less developed nation than its East African neighbours, and seeks to offer a low-density, high-quality, and high-priced tourism experience. Numerous deficiencies, however, are present in its tourism product. A lack of infrastructure, trained staff, and legal and regulatory framework offer severe challenges for the delivery of world-class service quality. In addition to a lack of marketing and promotion, the tourism industry has failed to diversify into areas beyond wildlife, such as culture and beach tourism. Consequently, most visitors treat Tanzania as an add-on to their Kenyan safari. Tanzania however, is moving towards developing the infrastructure necessary to occupy its market niche. With careful planning and management, Tanzania has the tremendous potential to develop a diverse and sustainable tourism industry. © 2000 Elsevier Science Ltd. All rights reserved.

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1. Introduction

Tanzania is a nation possessing a rich storehouse of biological diversity. Since the mid-1980s, following major reforms in foreign tourism policies, Tanzania has experienced tremendous growth in nature-based tourism. Little information, however, has been published as to recent developments in Tanzanian tourism, and the tourism product. This article is a compilation of such information. A brief political history of the nation of Tanzania is presented, followed by sections on the historical development and institutional organization of tourism within the country, tourism legislation, the tourism product, a market analysis of tourism, and future plans for the industry.

The United Republic of Tanzania (Fig. 1) is located in eastern Africa, bordering the Indian Ocean between Kenya and Mozambique, and is home to some of the most spectacular natural features in both Africa and the globe. From the top of Africa's highest peak (5895 m), Mt. Kilimanjaro, through to the Serengeti plains, Ngorongoro Crater, and beaches of Zanzibar, Tanzania

offers the international traveler the possibility for experiencing the vacation of a lifetime. Tanzania also contains a rich amount of cultural diversity, with over 120 different tribal groups being represented throughout the country.

Tanzania contains an area of 945,090 sqkm, 1424 km of which is coastline. The population in 1995 was measured at 28,700,000 — 47 per cent of which are below the age of 14, 50 per cent of which are between the ages of 14 and 64, and 3 per cent being above the age of 65 (Microsoft Encarta, 1997). This population is growing at a rate of 2.5 per cent per year. The literacy rate stands at 68 per cent overall — 79 per cent for males, and 57 per cent for females (University of Pennsylvania, 1998). From an economic perspective, Tanzania is one of the poorest nations on earth, relying primarily on its agricultural industry, which provides 58 per cent of its Gross Domestic Product (GDP) and employs 80 per cent of its workforce (Encyclopedia Britannica, 1996).

2. A brief political history

After World War I, and following a period of Arab and German rule, Tanganyika (mainland Tanzania), was

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Fig. 1. The United Republic of Tanzania.

decreed to Britain by the League of Nations. The British Empire, who already controlled Kenya and Uganda, attempted to persuade settlers to grow crops and harvest livestock in the new territory. However, unlike the successes experienced in Kenya and Uganda, early settlers encountered numerous difficulties with both cattle disease and the tsetse fly. Therefore, due to these hardships, Tanganyika was viewed as a lower priority than the other African nations under British rule, and fewer funds were invested within its infrastructure (Crowther, 1994).

In 1961, Tanganyika became independent from Britain and in the following year became a republic. Under the leadership of its first president, Julius Nyerere, Tanganyika joined with the islands of Zanzibar to form the Republic of Tanzania in 1964. The newly formed one-party government was based upon a unique brand of socialism called *ujamaa* (“family-hood”). This political philosophy, based on the principle of self-reliance, allowed for a high level of government ownership of property, and control of resources in the marketplace. Agriculture, the key to development, could produce higher returns it was thought, if people were moved into cooperative villages and worked together for mutual benefit. In addition, having centralized villages would allow the government to provide better social services like schools, medical facilities, and running water (Crowther, 1994). While initially met with enthusiasm and promoted as voluntary, people who refused to cooperate

with the program were later coerced by the government into doing so, creating a ruling bureaucratic class (Freisen, 1995).

While successfully increasing the literacy rate, and unifying the people through a sense of nationalism via the common national language of Kiswahili, *ujamaa* actually decreased crop production, and did not provide the promised level of social services. In addition, external forces such as a debt crisis, decline in the agriculture market, war with Uganda, and increase in the price of oil, contributed to a time of intense hardship within Tanzania (EXEGY, 1995). Eventually, as a result of both internal and external pressures, the International Monetary Fund (IMF) and the World Bank began to encourage the Tanzanian government to reduce its role in the economy, and allow the market to function freely.

National opposition to Nyerere caused him to step down in 1985. The new leader, Ali Hassan Mwinyi signed an agreement with the IMF in 1986, and together developed a Structural Development Program (SDP), which encouraged a process of economic liberalization that continues to this day. While officially ending in 1989, the SDP was replaced by a new program called the Economic and Social Adjustment Policy (ESAP). These reforms have led to the liberalization of trade, devaluation of the Tanzanian Shilling, and increased privatization within the economy (Matthews, 1992). After the passing of new legislation for a democratic voting process, 1995 saw the country’s first multi-party election, one in which current president Benjamin Mkapa was voted into office.

3. Tourism in Tanzania

3.1. History and development of tourism

Due to the ideology of socialism, the government originally controlled the tourism industry. The Tanzania Tourist Corporation (TTC) built, owned and managed 15 properties and hotels. The development of tourism, it was argued, would not contribute to the *ujamaa* policy of self-reliance, and would in fact promote a dependency upon the developed world (Freisen, 1995). Therefore, the government invested few funds into tourism infrastructural works and discouraged private and foreign investment. Despite this lack of initiative, tourist numbers increased within the country during the 1960s and 1970s. This was mainly due to a growing tourist industry within the bordering country of Kenya. Many tourists would cross the border into Tanzania and visit the northern national parks as an “add-on” to their Kenyan destination safari. Most of the economic benefits however were not felt in Tanzania, but occurred to Kenya. With the dissolving of the East African Community, and increasing tension over cross-border issues, the Tanzania/Kenya

border was closed in 1977 (Matthews, 1992). This, in addition to the war with Uganda, led to a large decline in foreign visitation.

With an increasing economic crisis, and subsequent political reforms, the Tanzanian government belatedly had a change of heart, and re-opened the Kenyan border in 1985 and began to invest in the tourism industry. Tourist visitation began to rise again. Subsequently, the TTC was disbanded and the Tanzania Hotels and Investments corporation (TAHI) and the Tanzania Tourist Board (TTB) were formed. In addition, a number of private and foreign companies began to invest in Tanzania and provide some hotels of international standard. Fig. 2 shows the trend in visitor arrivals from 1972 to 1996.

3.2. Institutional organization of tourism in Tanzania

The Tourism Division, found within the Ministry of Natural Resources and Tourism (MNRT), is the main governmental body responsible for tourism within Tanzania (Fig. 3). There are two main sections reporting to the Director: Travel and Facilitation, and Hospitality and Development. Responsibilities of the Travel and Facilitation Section include industry and public relations, finance, licensing, policy/planning, tourism statistics and research, and the Tourist Agency Licensing Authority (TALA). The Hospitality and Development Section is responsible for hotel licensing, inspection, classification, and standards, and the Hotels Board (CHL Consulting Group, 1996). As can be seen above, the Division is also responsible for the Tanzania Tourist Board (TTB) — established under the Tourist Board Act of 1992, for the development and marketing of all aspects

of the tourism industry to and in Tanzania (TTB, 1996), and the Hotel and Tourism Training Institute (HTTI).

Following the disbandment of the TTC in 1992, each of the hotels were required to operate on a commercial basis under their own boards of directors as limited liability companies (CHL Consulting Group, 1996). Tanzania Hotels Investment Co. Ltd. (TAHI), a parastatal, was also formed in order to maintain state ownership in certain hotels such as the Seronera Wildlife Lodge, Lobo Wildlife Lodge, and Mt. Meru Hotels. However, the government is considering selling off majority ownership and maintaining a minority shareholder status within the corporation. Currently, TAHI has entered into joint ventures on some of their estates with international companies, such as Novotel in Arusha.

The presence of the private sector has increased over the past few years within Tanzanian tourism. While numerous small-scale safari operations have entered the market, a few international standard restaurants have recently been established in Dar Es Salaam and Arusha. In addition, a number of high quality hotels have also been constructed, such as the Zanzibar Serena, and Tarangire Sopa. With the development of the private sector has come the subsequent mobilization of a few relevant trade organizations. Most predominant are the Tanzania Tour Operators Association, the African Association of Tour Operators, the Tanzania Travel Agents Association and the Hotel Keepers Association of Tanzania.

3.3. Tourism legislation in Tanzania

There are four relevant pieces of legislation for the tourism industry. The first is the Tanzania National

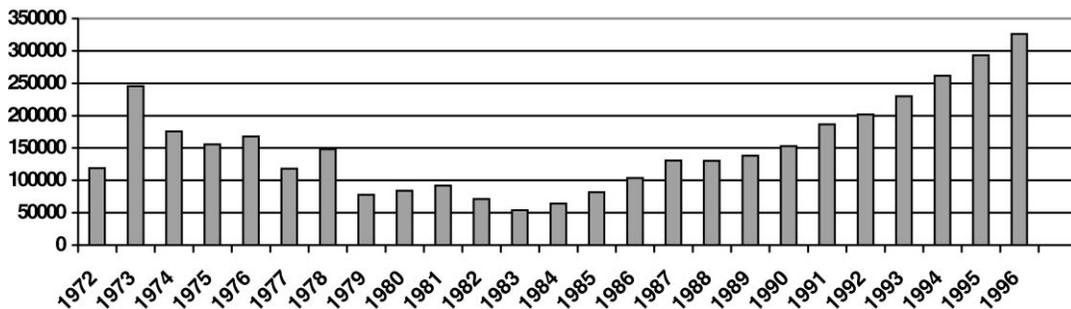


Fig. 2. Visitor arrivals to Tanzania — 1972 to 1996. Source: Freisen (1995), Tanzania Tourist Board (1996).

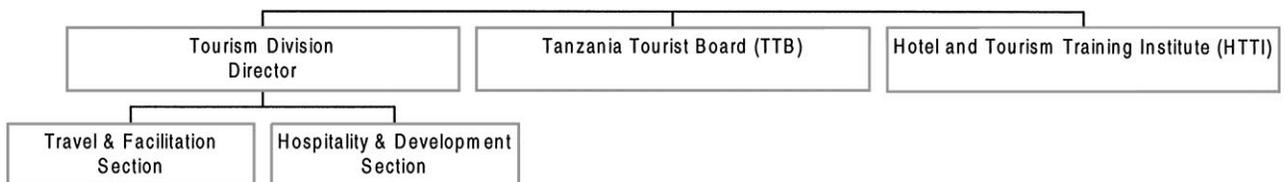


Fig. 3. Organizational chart for tourism division. Source: CHL Consulting Group (1996).

Tourist Board (Amendment) Act 1992, which stipulated the creation of the TTB. According to the legislation, research and the development of amenities are to be part of the funding program. However, no such activities are taking place, due to severe budget restraint in recent years. Little capital is left over after salaries have been administered (TTB, 1995).

The Hotels Act 1963 provided for the creation of a Hotel Board to be in charge of licensing, inspection, classification of hotels, and the creation and enforcement of industry standards. The Act however has been out of commission for a long time, as insufficient funds have crippled the creation of a Hotels Board (NOVIJVP, 1995). The Tourist Agents (Licensing) Act 1969, is in operation and provides the legal basis for the licensing of tourist agents and outfitters. The Hotel Levy Act 1972 stated that hotels must pay a levy on accommodation and food charges received from guests.

3.4. *The tourism product today — positives and negatives*

Tourism presently represents 7.5 per cent of Tanzania's GDP, 25 per cent of its total export earnings, and is the country's second leading foreign exchange earner, next to agriculture. Directly, tourism sustains an estimated 25,000 jobs (MNRT, 1997). Tanzania's competitive strengths, according to a survey of prevalent tour operators in Europe and North America, are found in its abundant and diverse wildlife, scenery, low tourist numbers, unspoiled natural environment, and friendliness of its people. In addition, operators felt that the basic product was superior, and if the infrastructure could be improved, it could demand a premium price (CHL Consulting Group, 1996).

In regards to visitor density, Tanzania visibly presents the opportunity for a more intimate experience of nature than its neighbour to the north, Kenya. Table 1 clearly shows the vast difference in usage within important wildlife areas. Tanzania's differentiation strategy certainly rests upon its ability to provide a low-density tourism experience. Coupled with its wildlife resources, Tanzania possesses the potential to be world-class destination. But how realistic is this potential at present?

Table 1
A comparison of visitor densities in Kenya and Tanzania^a

Kenya	Visitor density per 1000 km ²	Tanzania	Visitor density per 1000 km ²
Lake Nakuru NP	2293	Lake Manyara NP	296
Masai Mara	356	Serengeti NP	5
Nairobi NP	3627	Ngorongoro CA	23

^aSource: Matthews (1992).

Sources illuminate a number of significant deficiencies in the Tanzanian tourism product. They can be summarized within the following categories:

- *Lack of infrastructure*: According to ministry sources, a grading/rating system for hotels within Tanzania does not exist because few would pass (Matthews, 1992). Most accommodation is in a state of decay, and only a handful of international standard hotels exist within the country. The road from Arusha en-route to Lake Manyara and Serengeti National Parks is so dilapidated, many people purchase an airline ticket while on their safari, and fly back from Serengeti to Arusha (Wade, 1998). Considering the importance of this route, this represents a lost opportunity for both the industry and the tourist. In addition, virtually no signs or information exist along tourist routes, and many areas are simply inaccessible and unconnected. Services along the spectacular coastline of the Indian Ocean are few and far between. International and inter-country communication is extremely difficult and impossible at times, and both power and water sources are frequently inoperational. A substantial amount of infrastructural works are required before more of the country's potential can be developed (Matthews, 1992).
- *Lack of trained staff*: Present output 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-par private schools have arisen and standards of training are uneven. In addition, no training or education for the management of the hotel, restaurant or travel sector exists within the country, or any written policy and objectives towards human resource development in tourism (NOVIJVP, 1995). Tanzania does not utilize Utali College in Kenya, which has a hotel and tourism training program and would make a reasonable training site. Low wage rates sometimes lead staff to engage in corruption, possess poor attitudes and motivation towards their work, and thus exhibit poor levels of service and low levels of professionalism (CHL Consulting Group, 1996). Filling skill gaps with foreigners only compounds the problem and increases the resentment of the local people towards both tourism and the tourists themselves.
- *Governmental and bureaucratic factors*: A lack of legal and regulatory framework towards tourism exists. Little coordination can be found amongst relevant ministries, private sector actor groups, and non-governmental organizations (NGOs). Regional and international tourism linkages are weak, and community awareness and participation are virtually non-existent (MNRT, 1997). Furthermore, both the Tourism Division within the MNRT and the TTB are under-funded and under-staffed. Marketing has been so neglected by

the Tanzanian government that many visitors think that Mt. Kilimanjaro and Serengeti National Park are found in Kenya. This is not surprising. A favourite photo from Kenya contains the wildlife in Amboseli National Park with Mt. Kilimanjaro in the background.

Therefore, while exhibiting tremendous potential, Tanzania is currently for most tourists simply an add-on to their Kenyan destination. In addition, the whole tourism product revolves around the wildlife industry, and has failed to diversify itself into other strengths that the country has to offer such as cultural and beach tourism.

3.5. Tourism market analysis

Tanzania currently (assuming the figures have not significantly changed since 1993) holds 0.05 per cent of the world tourism market, while all of East Africa holds less than 1.0 per cent, and Africa only 3.6 per cent (Table 2).

Table 3 shows Tanzania in sixth place in relation to other African nations in foreign tourist arrivals. The Tanzanian government, according to most sources (although some sources give higher figures), wishes to attract 500,000 tourists by the early years of the 21st century and maintain that number as a maximum cap in order to avoid “mass tourism” (Hrjanski, 1996).

Table 4 shows Tanzania in fifth place in Africa in relation to income earned through tourism. These figures should be treated with caution however, due to the diversity of methodologies used by each nation in calculating the figures.

Table 5 shows high average tourist expenditure per person in Tanzania. However, caution must be given to average expenditure per tourist figures reported by the Tanzania Tourist Board. According to their data, tourists spend more money per person in Tanzania than any other country in East Africa, and more than the world average. Even though we are cautious about the use of these figures, it is clear that Tanzania is a high value, high cost international tourism destination.

Tourism in Tanzania is based primarily upon its abundance of wildlife. Therefore, one must judge

Table 2
Global tourism Arrivals in 1993^a

Region	Arrivals	Percent of the world
Tanzania	230,000	0.045
East Africa	3,406,000	0.66
Africa	18,296,000	3.56
World	512,992,000	100.0

^aSource: NOVIJVP (1995).

Table 3
Number of tourist arrivals in selected African countries — 1996^a

Country	Number of arrivals
South Africa	4,944,000
Tunisia	3,885,000
Egypt	3,528,000
Zimbabwe	1,529,000
Kenya	717,000
Tanzania	310,000
Uganda	205,000
Zambia	264,000

^aSource: World Tourism Organization (1998).

Table 4
Tourism receipts in selected African countries — 1996^a

Country	Tourism receipts (US\$)
Egypt	3204 million
South Africa	1995 million
Tunisia	1451 million
Kenya	474 million
Tanzania	322 million
Zimbabwe	219 million
Uganda	100 million
Zambia	60 million

^aSource: World Tourism Organization (1998).

Table 5
Average expenditure per tourist in selected countries/regions^a

Country/region	Average expenditure per tourist (US\$)
Tanzania	988
World	714
Kenya	677
East Africa	430
Africa	388
Uganda	383
South Africa	374
Zimbabwe	141

^aSource: Tanzania Tourist Board (1996).

Tanzania's position in the marketplace by visits to wildlife areas. Table 6 illustrates that especially when compared to neighbouring Kenya, Tanzania holds a very small share of the wildlife tourism market in Africa.

Most visitors to Tanzania visit the “Northern Circuit”. This consists of a safari from Arusha, to Lake Manyara and Tarangire National Parks, Ngorongoro Crater, and on to Serengeti National Park. Upon completion, most tourists drive back the same route in which they came, to return to Arusha. Many tourists follow this with a climb of Mt. Kilimanjaro, and a few visit Zanzibar and Dar Es Salaam. In addition a “Western Circuit” exists, which is rarely traveled and includes the famous Gombe National

Table 6
Market share of visits to wildlife areas in sub-Saharan Africa^a

Market/destination	US % of market	Europe % of market	Japan % of market
Tanzania	7	2	3
Zimbabwe	8	3	0
Kenya	34	26	37
Other	49	69	60
All	100	100	100

^aSource: CHL Consulting Group (1996).

Park, where Jane Goodhall conducts her legendary research on chimpanzees, and Mahali and Katavi National Parks. Furthermore, a “Southern Circuit” exists, which takes tourists to such areas as Ruaha and Mikumi National Parks, and on to the Selous Game Reserve. This route is also poorly known and infrequently traveled.

As described earlier, Tanzania lacks the proper infrastructure necessary to both host the desired number of tourists, and provide a high rate of satisfaction and service quality. Poor international access is part of the problem. Most tourists access Tanzania by road via the Kenyan border (66 per cent), and 12 per cent from Zambia. Only 18 per cent of tourists arrive at one of Tanzania’s two international airports — 10 per cent at Dar Es Salaam, and 8 per cent at Kilimanjaro International Airports (CHL Consulting Group, 1996).

Table 7 provides an estimate of the purpose of tourist visits. While most visitors register in the “unknown” category for visiting the country, clearly vacation and leisure make a sizeable market, both in numbers and in total dollars spent. In addition to business persons, and those visiting friends and family, one must also give notice to the fact that while hunting numbers are very low, each hunter averages an expenditure of \$35,000 per visit.

When one breaks down visitation by time of year, one can discover the high degree of seasonality found within Tanzania. Over one-third of all visitation occurs between July and August (Table 8). During this period, hotels in the north have an 80–90 per cent occupancy rate. However, the average yearly occupancy rate in this region is only 30–40 per cent (Matthews, 1992). Despite having many kilometres of spectacular and unspoiled coastline, the lack of facilities and development of their beach tourism industry has caused Tanzania to fail to capture any of Kenya’s November to March high season beach tourists (Matthews, 1992). This lack of diversity contributes to this seasonality which revolves around the peak wildlife times of the dry season.

Fig. 4 illustrates the origins of foreign visitors to the country by continent. Unfortunately, a breakdown of the purpose of visits by continent is not available. In addition, reliable figures on length of stay are not available.

Table 7
Visitor numbers to Tanzania by purpose of visit^a

Purpose of visit	Numbers	Average spending per person in US\$	Total US\$ spent in millions
Vacation/leisure	70,000	1200	84
Hunting	600	35,000	21
Other leisure	9000	1200	11
Business	40,000	1000	40
Conference	5000	1000	5
Visiting friends	40,000	500	20
Others/not stated	115,000	210	24
Totals	279,600	732	205

^aSource: Melamari (1996).

Table 8
Seasonality of arrivals to Tanzania in per cent by month and quarter 1990^a

<i>First quarter</i>	22.0%	<i>Third quarter</i>	34.5%
January	6.7%	July	15.5%
February	8.6%	August	11.1%
March	6.7%	September	7.9%
<i>Second quarter</i>	20.2%	<i>Fourth quarter</i>	23.3%
April	7.4%	October	8.0%
May	4.1%	November	8.4%
June	8.7%	December	6.9%

^aSource: Matthews (1992).

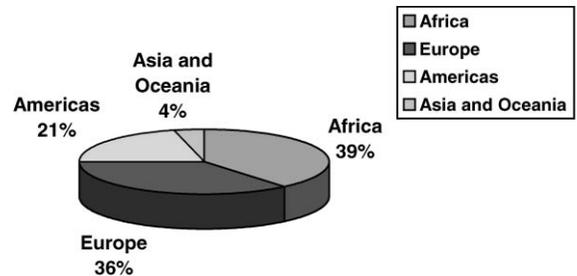


Fig. 4. Visitor arrivals to Tanzania by continent. Source: Tanzania Tourist Board (1996).

However, due to the “add-on” nature of visitation from Kenya, it would be logical to assume that the length of visitation time would be low compared to competitor nations.

Each particular segment possesses unique characteristics, which have implications for marketing. Domestic tourism is low due to the common person not having the resources to hire a vehicle and stay at tourist lodges. African tourists, who represent the highest percentage of visitor arrivals, would be the group most likely to be visiting friends and relatives. Kenya represents 46 per cent of African visitation, with Zambia ranking second at 6.4 per cent (TTB, 1995). South Africa in the future could

represent a possible growth market, but in recent times the most common international travel destinations amongst South African affluent travelers have been the United States, Europe, and Australia (CHL Consulting Group, 1996).

Europe exhibits a demand for safaris and a high demand for beach tourism (Table 9). While a holiday only consisting of beaches represents just 15 per cent of the market, over one third (35 per cent) seek the beach and safari combination holiday. The leading demand areas for Tanzania are the United Kingdom, Scandinavia, Germany, Italy, and France (TTB, 1996).

North American tourists differ from Europeans in the sense that they have a higher demand for wildlife safaris. In addition, they are more sensitive to issues of regional security (Matthews, 1992). The Asian market currently represents a small proportion of visitation to Tanzania. However, due to the closer geographical proximity than North America, this should represent a possible growth market in the future.

3.6. Plans for the future

In the last few years, three relevant documents have surfaced which could significantly influence the future direction of tourism in Tanzania. These include:

- The *Integrated Tourism Master Plan for Tanzania*, which presents a marketing analysis and strategy to meet desired objectives.
- The *Tourism Infrastructure Project*, which presents specific transportational linkages and tourist circuits, service needs, with a budget and timeline for completion.
- The first draft of a *National Tourism Policy*, which is intended to provide the bureaucratic framework into the next millenium.

All have been funded by international NGO's, and all are meant to be complementary to one another.

The pace at which the industry can develop depends on how quickly the enormous infrastructural deficiencies can be improved; and this in turn rests upon overcoming a range of other problems such as un-

wieldy bureaucratic processes which deter potential investors (Matthews, 1992).

The main marketing strategy leading Tanzania into the next millenium will be to attract a low volume and high-yield segment. This will require the elevation of infrastructure and services to levels above international norms. Specific plans summarized from the three documents (CHL Consulting Group, 1996; NOVIJVP, 1995; MNRT, 1997) include:

- Diversify the tourism product to include beach, cultural and mountain climbing tourism in addition to safari tourism.
- Extend the 'Northern Circuit'. This would involve tourists, after their visit to Serengeti National Park, moving along a newly constructed road en-route to Lake Natron, Ol Donyo Lengai and back to Arusha rather than on the same route in which they came. As it stands currently, the Northern Circuit is not a true circuit.
- Develop the Southern Circuit to include beach tourism on Mafia Island, and offer raft/boat trips up the Rufigi River to the Selous Game Reserve.
- Through this diversification, promote Tanzania as a single destination independent of Kenya, and thus increase the visitor's length of stay, and help eliminate the current oscillations found in seasonal visitation.
- Provide information along the routes and develop service centres where tourists can find suitable toilet facilities, restaurants and go shopping.
- Improve service quality through the development of training for staff.
- Increase the budgets for both the Tourism Division and the TTB in order to provide for more research and effective promotion of the country. This will eventually offer the promotion of the various tourism options, and the various circuits including a Grand Circuit that would involve an all-encompassing tour of the country.
- Establish a comprehensive tourism database.
- Develop a Certification Board for the tourism industry.

The above documents address a number of significant issues and weaknesses found in the Tanzanian tourism product. However, while appearing good on paper, implementation of these plans could pose quite a challenge. Firstly, some of the plans are quite general in nature. For example, while the development of trained staff for the improvement of service quality is a good objective, how is this training going to take place? How can the shortcomings of the current training schools within the country be overcome? Is this a feasible and realistic short-term goal? In particular, a number of more specific and

Table 9
European market demand profile^a

Tour program	Demand profile %
Beach resort	15
Beach and safari	35
Single destination safari/sightseeing	30
Dual destination safari/sightseeing	20

^aSource: CHL Consulting Group (1996).

strategic implementation plans are needed that address the intricacies of each specific objective. The initial plans look promising, but only when more detailed strategies are developed and start to be implemented, can we effectively judge their value.

Secondly, many external factors exist that could hamper any infrastructure gains. One case in point is the large income disparity between Tanzania and developed nations. It may be challenging for local Tanzanians who live in and view tremendous poverty each day to understand or sympathize with the need for the explicit luxuries of wealthy tourists — particularly to the point of offering a world-class service delivery better than that of competitor nations. Would it not be natural for such individuals to feel some resentment towards wealthy tourists? Would it also not be natural for these people to be at least tempted into engaging in petty theft, or accepting bribes offered by tourists to break certain wildlife viewing rules in parks? In addition, technology is becoming increasingly complex and expensive. As time moves on, the already large disparities in education and technical expertise will continue to grow, and could take many years to bridge.

Incidences of regional security could also have a role to play in Tanzanian tourism. For example, incidences of banditry on tourists in remote park locations, and terrorism (i.e. US embassy bombings) have occurred and if not controlled could destroy any gains. Furthermore, uncontrolled poaching occurs within some protected areas, due to a lack of resources to hire game wardens, and could eventually alter wildlife populations, damaging the tourism product.

The necessity of computers in many of the managerial and research plans poses some interesting challenges. For example, while extensive marketing research and database creation is needed, technicians must also be trained in the maintenance of computer technology. What good are state-of-the-art computer facilities if state-of-the-art computer viruses, difficult to control in the developed world, were to regularly infect them? The potential for “hard drive” and local area network (LAN) crashes is tremendous, and could slow down operations for days.

Financial assistance and technical expertise from the international donor community alone will not be enough to sustain Tanzanian tourism. Both Tanzanian citizens and the national government must also understand and desire the benefits of international tourism in order to give it a high priority and be motivated for the program. To install massive infrastructure in the country only to leave it run on its own or by foreigners will not work. Expertise must ultimately be created in-house with local nationals. Only when such expertise exists within the country and with its own people, will Tanzania feel a sense of ownership over its tourism industry — as opposed to a colonialistic invasion. Only with this sense

of ownership, can Tanzanian tourism be a long-term and sustainable international success.

4. Conclusion

Tanzania is an example of the challenges facing a poor, underdeveloped country developing an international tourism industry. At present the country has an excellent set of national parks and game reserves, a system of world class significance. The existing high value, high cost nature-based tourism industry is based on the environmental features of these protected areas. However, the biggest challenge facing the country is in bringing the transportation, accommodation and information sectors up to the standards expected of an international tourism destination. Low levels of available capital, weak internal tourism education and poorly funded regulatory institutions are recognized problems, and plans are underway to address these issues. While the initial plans look encouraging on paper, only time can judge their degree of effectiveness, as many challenges lie ahead regarding their implementation. Ultimately, expertise must be developed in-house to give Tanzanian nationals a sense of independence and ownership over their tourism industry.

Tanzania's tourism development is being assisted by strategically placed foreign aid, for example from US, British, EU and Swedish foreign aid programs. Tanzania's nature-based tourism industry is developing well, with increasing levels of environmental protection, and a developing coordinated public-private service industry. However, the high levels of funding needed for infrastructure, training and information management will keep the industry from developing to its full potential in the medium term. However, a coordinated and enhanced foreign aid program could considerably embellish the development of a long-term and sustainable nature-based tourism industry.

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