3 Factors Constraining the Linkages between the Tourism Industry and Local Suppliers of Meats in Zanzibar

Wineaster Anderson and Saleh Juma***

Many developing countries strive to embrace the tourism industry and link it with local agricultural produce as a means of expanding local markets which, in turn, contributes to economic development. Linking the tourism industry with local agriculture is crucial for poverty reduction in developing economies because the majority of their people depend on agriculture-related activities for survival (IFAD, 2003). The tourism industry has high potential to provide a worthwhile market for local agricultural produce in destination countries as it increases the share of the poor from the tourist dollar spent at the destination (Mitchell and Ashley, 2010).

The concept of local linkages has been defined generally as the mechanisms through which businesses build economic links with residents in their local economy (Anderson, 2008; Pattullo, 1996). The expansion of local linkages connotes the increased usage of other sectors at the destination, which stimulates the economy as a whole and creates synergy effects between sectors (Mitchell and Page, 2005; Goodwin and Bah, 2003). Taking on a sector specific approach, Ashley et al. (2002) refer 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. Despite these promises, local linkages have failed in many destinations due to the numerous challenges that confront the tourism industry. The most recognised of these challenges, particularly in developing economies, include poor infrastructure, poor product development

* Department of Marketing, University of Dar es Salaam, Tanzania
** Ministry of Agriculture and Natural Resources, Zanzibar, Tanzania

Zellmer.indd 49 8-12-2011 16:55:25

and management, poor marketing, poor linkages within local economy, poor institutional and technical capabilities, and shortage of appropriate and specialised core and skilled personnel (Mitchell and Faal, 2006).

Counter-acting these challenges, there is need for innovative analyses to identify opportunities for inclusive and sustainable tourism development. In this respect, the analysis of the value chains to identify local economic linkages is of paramount importance. To this end, we will explore in this chapter the factors constraining the linkages between the tourism industry and local suppliers of local beef and chicken meats in Zanzibar. After introducing the case study area, the current linkages between tourism and local suppliers in Zanzibar are briefly analysed and major challenges are identified. We conclude the chapter by pointing towards a few ideas that could improve the linkage between the tourism industry and the local meat suppliers in Zanzibar.

THE ZANZIBAR ARCHIPELAGO

Zanzibar is a semi-autonomous state within Tanzania, made up of the islands of Unguja and Pemba. Like many developing economies, this archipelago relies heavily on agriculture, with the majority of its citizens making their living from subsistence farming and fishing. Poverty rates are more than 50 per cent (GoZ, 2007). In recognition of this challenge, Zanzibar has launched several measures intended to tackle poverty, including the adoption of the Zanzibar Strategy for Growth and Reduction of Poverty commonly known as MKUZA, which advocates inter-sectoral linkages (RGoZ, 2010). Following the decline of clove production and the fall of its price in the international markets in the early 1990s, Zanzibar adopted tourism as a priority sector for its economic growth. Tourism accounts for over 51 per cent of Zanzibar's GDP with an annual growth rate of between nine and 10 per cent over the past five years (Steck et al., 2010). Consequently, annual tourist arrivals have increased drastically over the last years, from 86,918 in 1999 to 134,919 in 2009. This 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 to improve their welfare. 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 (RGoZ, 2003), and the Strategy for Half a Million Tourists in Zanzibar 2005-2014 (RGoZ, 2005). These documents declare explicitly the desire and the need to link tourism with agriculture and other economic sectors.

With regard to important tourist markets Europe is by far the most important, accounting for around 75 per cent of tourist arrivals. Italy alone accounts for over one third of all direct arrivals in Zanzibar, mainly due to increased direct

flights together with the creation of all-inclusive resort hotels. The UK market makes up 10 per cent of international arrivals, whereas South Africa, USA and Scandinavia are gradually becoming important markets. As Table 1 summarises, currently there are about 349 registered hotels with 7,009 rooms and 13,198 beds (ZCfT, 2010).

Table 1: 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: Zanzibar Commission for Tourism, 2010)

The potential benefits of tourism to the development of local economic sectors have been widely acknowledged (e.g. McBain, 2007; Ashley et al., 2006; Telfer, 2000). In Zanzibar, most of the government policies related to tourism development, for example the Zanzibar Tourism Master Plan 2003 (URT, 2003), Zanzibar Tourism Policy Statement 2003 (RGoZ, 2003), the Strategy for Half a Million Tourists in Zanzibar 2005-2014 (RGoZ, 2005) and MKUZA II (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 linkages between tourism and local suppliers in Zanzibar are not encouraging. There has been a particular concern that many hotels and restaurants import a substantial amount of their food requirements (Anderson, 2011a; Steck et al., 2010; ZATI, 2009; ZBC, 2009).

In order to realise the positive impact of tourism on poverty reduction, it is necessary to create strong linkages with other economic sectors, particularly the agricultural sector. However, the linkage between tourism and local suppliers of agricultural commodities is constrained by many barriers ranging from demand and supply to legal and constitutional factors (see Meyer, 2006; O'Driscoll, 2005; Torres and Skillicorn, 2004; Torres, 2003; Torres, 2002; Telfer, 2000; Belisle, 1983). This chapter focuses on the sector specific approach and reveals the demand and supply related factors constraining the

linkages between the tourism industry and local suppliers of local beef and chicken meats in Zanzibar.

The decision to focus on beef and chicken meats in this chapter is based on the evidence reported by the ZATI (2009) that only 10 per cent of beef and chicken meat consumed in local tourist hotels and restaurants is sourced from local suppliers. Until now, and to our knowledge, there has been no study conducted to identify factors constraining the linkages between tourism and local suppliers of specific agriculture commodities in Zanzibar. Existing studies on value chain analysis such as Steck et al. (2010) and Anderson (2011a) focused on the entire tourism value chain in Zanzibar, instead of a commodity approach that focuses on the constraints of linking tourism with particular agricultural commodities. The use of this sectoral approach, however, entails ignoring the diversity of the sector and the varying nature of commodities within the sector that cannot be treated equally. That is, different agricultural commodities require different techniques for handling data; hence the linkage constraints for one commodity might be different to others. Realising this, we decided to look at one commodity (beef and chicken meats) to study factors constraining the linkages between tourism and local suppliers, gaining valuable practical and theoretical) insights so far ignored by the sectoral approach.

The Zanzibar Livestock Policy draft (RGoZ, 2009) acknowledges the fact that the livestock sector currently lacks appropriate marketing avenues, quality standards and assurance and control systems, and thus it advocates investment in value addition for livestock products, and the formation of a strong livestock producers, traders and processors associations. Recently, the focus has been directed towards linking the livestock sector with the booming tourism industry under the assumption that more benefits will be generated for individual Zanzibaris as well as the Zanzibar economy in general. This assumption has been supported by the chairperson of the Zanzibar Association of Tourism Investors (ZATI) 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 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 the keeping of dairy and beef cattle, goats and poultry among others. It is estimated that about 37.8 per cent 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 have significant potential for market-led commercialisation of the livestock sub-sector, driven by domestic urban demand and increasing tourist investments. In 2009 the livestock sub-sector contributed about 4.5 per cent to Zanzibar's GDP which is about 14.6 per cent of the total agricultural share in Zanzibar GDP (RGoZ, 2009). Despite its importance, the sector's potential is under-utilised and the country has a large deficit in livestock products which is addressed by imports. Available data shows that about 91 per cent of livestock products consumed in the 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). The low adoption of improved production technologies, unorganised market outlets and lack of value addition have been mentioned by the Revolutionary Government of Zanzibar (RGoZ, 2009) as among the main constraints facing livestock development in Zanzibar.

In line with the efforts invested in creating local linkages between tourism and the local livestock sector, this chapter responds to the following questions: What are the major constraints associated with sourcing beef and chicken meats locally? What are the main supply-related problems encountered by local suppliers to tourist hotels and restaurants? What are the difficulties feared by those who are hesitant to supply to tourist hotels and restaurants? To respond to the research questions, interviews involving 78 hoteliers and restaurant workers 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 and managers. The study covers three out of four existing tourism zones in Zanzibar, specifically on Unguja Island: Stone Town, its suburbs, the North-East coast, and the South-East coast. 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, and the remainder at their localities.

Major Constraints Associated with Sourcing Beef and Chicken Meats Locally

The study results reveal that the hotels involved in the survey receive an average of 5,000 visitors annually with the average length of stay per tourist

being between seven and 13 days. Being asked about the years of operations, the majority (60 per cent) reported to have been in operation for between five and 15 years. Following Lundgren's (1973:15) findings that, "as hotels become more established, over time they tend to increase use of local products", it suggests that many hoteliers have knowledge of an experience with the local environment. On the other hand, Torres (2003) argues that the more a tourism industry matures, the more likely it is to use imported foods. We assume that Torres's viewpoint is more applicable in small island destinations such as Zanzibar that lack adequate land resources and capacity to feed both locals and visitors (Anderson, 2011b; 2008).

The nationality of hotel owners and managers is said to be another factor that influences the hotel's acceptance of local products as suggested by Torres (2003), Momsen (1998) and Pattulo (1996). The first two authors found that a hotel managed by a local and with a local chef is more likely to demand locally produced food items than the hotel with expatriate or internationally trained chefs. According to Pattulo (1996) expatriate chefs prefer foods that they are familiar with. Our findings show that 44 per cent of hotels were owned by Zanzibaris, 6 per cent by people from Tanzania mainland, and 50 per cent by foreigners. Similarly, 41 per cent of the interviewed hotels were managed by Zanzibaris, 15 per cent by Tanzania mainlanders, and 43 per cent by foreigners.

With regard to the use of beef and chicken meats from local suppliers, about 60 per cent of the interviewed hotels indicated that they used 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 seafood and 18 kilograms of chicken. The findings reveal that the majority of the hotels consumed at least 1,000 kilos of meat from local markets per annum.

Enquiries were made into what prevents the hotels from sourcing most of their beef meats locally. The results 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 (i.e. local suppliers violate agreements and do not offer formal receipts in addition to inconsistent supplies), the shorter payment period demanded by local suppliers, and the insufficient supply at local markets as the main constraints (see Table 2).

A typical response from respondents working in hotel or restaurant was:

> 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 is among the important factors in making the decision to buy locally or from outside the destinations. For example, Abdool and Carey (2004) found that hoteliers in Tobago preferred to deal directly with local suppliers and would support initiatives if the prices of local supplies were reduced. However, small-scale producers do not benefit from economies of scale in production and marketing and they generally incur high production and marketing costs (Meyer, 2010; 2006). Therefore, their selling price is normally always higher than that of non-local products. Additionally, it is also possible for local beef and chicken meats to be devalued by cheap imports. This was a major concern in Zanzibar where hoteliers complained about the high prices demanded by local suppliers. For example, one of the respondents stated that:

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

Table 2: Major constraints of sourcing meats locally for hoteliers/ restaurants

Major constraints	Hoteliers/ restaurant currently sourcing meat locally		Hoteliers/restaurants currently NOT sourcing meat locally	
	Beef (n=47) %	***Chicken (n=46)*** %	***Beef (n=26)*** %	***Chicken (n=30)*** %
Poor quality meats	51	28	100	100
High transaction costs	32	20	38	31
Local suppliers mistrust hoteliers	2	2	-	-
Local suppliers violate agreements	9	7	-	-
Local suppliers do not offer formal receipts	6	0	26	23
Very small chickens	0	43	-	-
Shorter payment period	-	-	59	65
Inconsistent supply	-	-	100	100

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.

When the local suppliers were asked about a complaint made by one of the respondents:

> Always we are 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

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.
Many hotels were not sourcing beef and chicken locally because they lacked confidence in the capacity of local suppliers to meet the hotel requirements. 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.

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.

The Supply-related Problems Encountered by 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 supplying to tourist hotels and/or restaurants.

When asked about the problems that constrain the business-to-business relationships with the tourism industry, suppliers revealed some common problems. Some respondents cited the problem of language, while others cited the complexities involved in negotiating with foreign operators. Likewise they mentioned the lack of trust between the two parties involved. These kinds of problems have been acknowledged in previous studies, such as Torres (2003), who attributes the mistrust and lack of communication between hoteliers and small-scale producers to socio-economic and cultural differences between the two parties. In Zanzibar, one respondent stated:

> 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. However, 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 the 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 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. One of the respondents said:

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

To the hoteliers and restaurants, the selling 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.

Conclusion

This chapter explored factors constraining the 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.

References

Abdool, A. and B. Carey (2004) *Making all-inclusives more inclusive – a research project on the economic impact of the all-inclusive hotel sector in Tobago.* Bristol: The Travel Foundation.

Anderson, W. (2008) *Analysis of all-inclusive travel mode: demand and supply perspectives in the Balearic Islands.* Unpublished PhD Thesis, University of the Balearic Islands, Palma de Mallorca.

Anderson, W. (2011a) Leakages in the tourism systems: case of Zanzibar. *Tourism Development Journal, forthcoming.*

Anderson, W. (2011b) Enclave tourism and its socio-economic impact in Zanzibar. *Anatolia, forthcoming.*

Ashley, C., Goodwin, H. and D. Roe (2002) *Pro-poor tourism strategies: expanding opportunities for the poor.* Pro-Poor Briefing No. 1. London: ODI, IIED, CRT.

Ashley, C., Goodwin, H., McNab, D., Scott, M. and L. Chaves (2006) *Making tourism count for the local economy in the Caribbean: guidelines for good practice.* Pro-Poor Tourism Partnership. Bristol: The Travel Foundation.

Belisle, F. (1983) Tourism and food production in the Caribbean. *Annals of Tourism Research* 10 (4) pp. 497-513.

Department Of Livestock Development (2010) *Zanzibar Agricultural Transformation for Sustainable Development, 2010-2020 for Agricultural Productivity, Food Security and Sustainable Livelihood.* Zanzibar: Ministry of Agriculture, Livestock and Environment.

Goodwin, H. and A. Bah (2003) *Improving access for the informal sector to tourism in The Gambia.* PPT Partnership Working Paper No. 15. www.propoortourism.org.uk/15_Gambia.pdf. Accessed: 12.07.2011.

IFAD – International Fund for Agricultural Development (2003) *Promoting market access for the rural poor in order to achieve the Millennium Development Goals.* IFAD Discussion Paper. Rome: IFAD.

Lundgren, J. (1973) Tourism impact/island entrepreneurship in the Caribbean. In: Momsen, R., ed., *Geographical Analysis for Development in Latin America and the Caribbean.* Chapel Hill: CLAG Publications, pp. 12-19.

McBain, H. (2007) Caribbean tourism and agriculture: linking to enhance development and competitiveness. ECLAC Study and Perspective Series - The Caribbean No. 2. Washington: Economic Commission for Latin America and the Caribbean.

Meyer, D. (2006) *Caribbean tourism, local sourcing and enterprise development: review of literature.* PPT Partnership Working Paper No. 18 http://www.propoortourism.org.uk/18_domrep.pdf. Accessed: 20.02.2011.

Meyer, D. (2010) Changing power relations: foreign direct investment in Zanzibar. In: Modesale, J., ed., *Political Economy of Tourism: a Critical Perspective.* London: Routledge.

Mitchell, J. and S. Page (2006) *Linkages and leakages: Local supply and imports.* Brighton: id21 Development Research Reporting Service.

Mitchell, J. and C. Ashley (2010) *Tourism and poverty reduction: pathways to prosperity.* London: Earthscan.

Mitchell, J and J. Faal (2006) *The Gambian Tourist Value Chain and Prospects for Pro-Poor Tourism,* ODI draft report. http://www.zeegam.nl/download/de%20toeristen%20 indusrtie%20in%20Gambia.pdf. Accessed: 13.10.2011.

Momsen, J. (1998) Caribbean tourism and agriculture: new linkage in the global era? In: Klak, T., ed., *Globalisation and Neoliberalism: the Caribbean Context.* Oxford: Rowman and Littlefield, pp. 115-133.

O'Driscoll, J. (2005) *Tourism and agriculture: creating linkages.* Department of Tourism and Hospitality Management; School of Business and Public Management The George Washington University. http://www1.american.edu/ted/niagra.htm, accessed: 05.09.2011.

Pattullo, P. (1996) *Last resource: the cost of tourism in the Caribbean.* London: Cassell Wellington House.

RGoZ – Revolutionary Government of Zanzibar (2003) *Zanzibar Tourism Policy Statement.* Zanzibar: Revolutionary Government of Zanzibar.

RGoZ – Revolutionary Government of Zanzibar (2005) *Strategy for half a million tourists in Zanzibar 2005-2014.* Zanzibar: Revolutionary Government of Zanzibar.

RGoZ – Revolutionary Government of Zanzibar (2007) *Zanzibar strategy for growth and reduction of poverty: 2007-2010.* Zanzibar: Revolutionary Government of Zanzibar.

RGoZ – Revolutionary Government of Zanzibar (2009) *Draft Zanzibar livestock policy.* Zanzibar: Revolutionary Government of Zanzibar.

RGoZ – Revolutionary Government of Zanzibar (2010) *The Zanzibar strategy for growth and reduction of poverty: 2010-2015.* Zanzibar: Revolutionary Government of Zanzibar.

Steck, B., Wood, K., and J. Bishop (2010) *Tourism, more value for Zanzibar: value chain analysis: final report.* Zanzibar: VSO, SNV and ZATI.

Telfer, D. (2000) Tastes of Niagara: building strategic alliances between tourism and agriculture. *International Journal of Hospitality and Tourism Administration* 1 (1) pp. 71-88.

Torres, R. (2002) Toward a better understanding of tourism and agriculture linkages in the Yucatan: tourist food consumption and preferences. *Tourism Geographies* 4 (3) pp. 282-306.

Torres, R. (2003) Linkages between tourism and agriculture in Mexico. *Annals of Tourism Research* 30 (3) pp. 546–66.

Torres, R. and P. Skillicorn (2004) Montezuma's revenge: how sanitation concerns may injure Mexico's tourist industry. *Cornell Hotel & Restaurant Administration Quarterly* - May, 2004. http://www.entrepreneur.com/tradejournal/pub/3038.html. Accessed: 09.01.2011.

URT – The United Republic of Tanzania (2003) *Indicative tourism master plan for Zanzibar and Pemba.* Dublin: URT. http://www.zanzibartourism.net/docs/masterplan.pdf. Accessed: 07.09.2011.

ZBC – Zanzibar Business Council (2009) *How tourism as the leading sectors can support agricultural development.* A paper presented at the Third Zanzibar Business Council Meeting, December 2009.

ZCfT – Zanzibar Commission for Tourism (2010) *Tourist database.* Accessed in Tanzania Tourist Board Statistics.

ZATI – Zanzibar Association for Tourism Investors (2009) *Progress report.* Prepared for the ZATI Annual General Meeting, December 2009.