



TOURISM PRODUCT DIVERSIFICATION IN TANZANIA: THE CASE FOR SCUBA DIVING

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ABSTRACT

Tourism is one of the fast growing industries in the world today. Many countries are attracted to it by its bright prospects despite temporary ups and downs. However, it is an extremely competitive industry. For East Africa, the traditional wildlife tourism product must be diversified and scuba diving is a good candidate in Tanzania. Marine tourism is relatively underdeveloped in Tanzania despite a wide range of important and valued species in the water bodies of the country. Research has shown that coastal zones around the world attract the largest number of tourists and the largest growth in the tourism sector is recorded in marine areas. Scuba diving is one of the coastal activities which are starting to receive more much attention due to its possible contribution to economic development. This paper provides an understanding of the potential and challenges for scuba diving tourism development in Tanzania and beyond. Tanzania can benefit from becoming a late comer to the planning involved in developing scuba diving especially by being more aware of its possible positive and negative impact on the marine environment.

Keywords: *Scuba diving, marine tourism, Zanzibar, product diversification*

1. Introduction

The tourism industry is the fastest growing industry in the world with an annual growth of 6 per cent. The prediction is that it will continue to grow during the next decade. Only one of every twenty jobs in Africa is in the tourism and travel industry; worldwide it is one out of every ten. There is a large potential if the travel and tourism industry could reach the global average. [Jan-Erik Jaensson, 2014] Tanzania is strategically located within Africa and between the Middle East, Asia and Europe. It is well served by international airlines. [Lusekelo Philemon, 2015].

Terrorism and epidemics now and again make a dent in tourism numbers, but the sector usually quickly rebounds. It now employs hundreds of millions and accounts for a tenth of global output. The tourism sector grew 4.4 percent in 2015 to nearly 1.2 billion people taking a trip outside their country. According to the data from the United Nations World Tourism Organization [UNWTO] in 2014 international tourism receipts from lodging, meals, transportation and purchases hit US \$1.5 trillion, up from US \$900 billion in 2010. [*The Citizen*, February 12, 2016]

More than 30 million tourists visit Africa every year. Over half of the international arrivals are for business purposes, and may partake in tourist activities as well, while 15 per cent travel for pure tourism and 30 per cent visit friends and family. Tourists select the continent as a destination for wildlife viewing and to enjoy its sunny skies. Africa is the world's number one destination for safaris which range from the exotic to the very simple. The tourism industry is one of the most important for the continent. It provided

12.8 million people with jobs, directly and indirectly, in 2011. Tourism in 2012 contributed over US \$36 billion or 2.8 per cent of the continent's GDP. Tourists to his region

mostly come from countries like France, the UK, the USA, Germany and Portugal. [*Daily News*, February 12, 2016]

The 2013 World Bank report entitled “Tourism in Africa: Harnessing Tourism for Improved Growth and Livelihoods” says that African countries can compete with other tourist rich regions of the world if they effectively plan for and integrate tourism into their economies. Tanzania, Botswana, Cape Verde, Namibia and South Africa are most likely to succeed in the tourism sector in the period 2013 – 2018. Africa’s mountains, savannahs and rivers as well as cultural events like music, dance and festivals are far above the natural assets found in other regions. African governments and the private sector are called on to work together to address obstacles such as land access and visa regulations to expand tourism opportunities, transform the business climate and create jobs, especially for women and youth. It was the first World Bank Report to comprehensively examine tourism throughout Sub-Saharan Africa. It recommended practical, evidence based measures to unleash the sector’s economic and development power across the continent. Tourism is one of the largest and fastest growing sectors of the world economy. However, constraints such as access to finance for investors, taxes on tourism investments, low levels of tourism skills among Africa’s population, lack of security, safety and high crime, and bureaucratic processes are present in varying degrees in the sub-Saharan African countries. [*Daily News*, October 8-14, 2013] According to the UNWTO, 63.6 million international tourists arrived in Africa in 2012, compared to 17.4 million visitors in 1990. While Africa accounts for 15 per cent of the world population, it receives only 3 per cent of world tourism Africa is home to the world’s youngest population, with close to 70 per cent of its population below the age of 25, and youth constituting about 37 per cent of the labor force, but making up approximately 60 per cent of unemployment. [*The Guardian*, February 13, 2014]

East Africa has again proven its charm as a preferred tourism destination after emerging first runner-up at the 12th UN World Tourism Organization [UNWTO] Awards for Excellence and Innovation in Tourism. Competition was stiff with 109 submissions from Africa, Asia, Latin America and Europe. This award recognizes initiatives that are highly innovative and managed by a public or public-private institution that reflects tangible and sustainable improvements in policy, processes and governance. EATP won for its multi-destination knowledge management tool that helps stakeholders package products without borders. EATP is made up of tourism players from the East Africa region among them Uganda Tourism Board, Burundi National Tourism Office, Kenya Tourism Board, Rwanda Development Board, and the Tanzania Tourist Board. Through this tool, regional tourism stakeholders have started trading each other’s products, packaging tourism products without borders, benchmarking among themselves and learning from each other. On the marketing front, East Africa is now holding joint marketing initiatives. [*Daily News*, January 26 – February 1, 2016]

2. Tourism Planning in Tanzania

Tanzania has in the past had to play second-fiddle to Kenya, which has a more developed tourism industry and better air links to key client markets in Europe and United States. But the surge in visitors to Tanzania over the past three years has chipped away at Kenya’s dominance and boosted Tanzania’s ambitions to become the regional tourism hub. Frequent attacks by Somali militants have also hit Kenyan tourism hard, scaring away tourists, some of whom headed down to Tanzania for similar tropical beaches and wildlife safaris.

Tanzania has been working on an environmentally friendly high value, low volume tourist strategy for a few years that has had great effects in Africa. The amount each tourist spends in Tanzania outpaces Kenya, Egypt and South Arabia. How did they do it? Part of this comes naturally – Tanzania ranks more attractively than both Egypt and Kenya on

natural resources, with Mount Kilimanjaro, Ngorongoro Crater and Zanzibar collective beating out the pyramids. But the government has also enforced strict regulations to keep hotel standards high. For example, Zanzibar’s coastline is dotted with much nicer resorts and fewer low-end beach shacks than Mombasa’s. [*The Guardian*, February 5, 2010]

A report entitled “International Marketing Strategy for Tanzania: Part I” says due to its limited budget, Tanzania must focus on marketing tourism attractions to countries such as the UK, the US, Germany, Italy, France, The Netherlands, Canada, Australia, Spain, South Africa and India. They provide many tourists to it. The report suggests that 90 per cent of the country’s marketing budget is spent on marketing Tanzania to those 11 countries. In 2013, Tanzania’s marketing budget was only 0.24 per cent of the Gross Domestic Product [GDP]. Quality tourism must be promoted to ensure environmental sustainability for economic betterment. Most travellers to Tanzania are experienced and are relatively highly educated and have high incomes. [Veneranda Smith, 2013].

As a result of this fact, the Tanzania Tourism Board [TTB] will undertake a number of initiatives as it seeks to increase the number of visitors and earnings from the sector. In 2015, the country attracts about 1.1 million visitors annually but TTB hopes the number can reach three million starting in 2017. One of such initiatives is its new website launched in 2015. The portal website is more advanced than normal websites. Anybody in the globe can access it to book online and pay for services online. Tour operators can also use it to advertise their products to the world. The government also launched a new brand as a way of promoting the country’s attractions to tourists. The new brand is “Tanzania the soul of Africa” replacing the former “Tanzania the land of Kilimanjaro, Zanzibar and Serengeti”. TTB also uses goodwill ambassadors who have willingly agreed to advertise Tanzania in the countries they are currently visiting without any pay which is another boost to tourism. [Rosemary Mirondo, 2016] Tanzania is unique because of prevailing peace in the country and its well-mannered and friendly people. The tourism sector directly employs close to half a million people and contributes to almost 25 per cent of total export earnings. [Beatrice Philemon, 2016] Tanzania, unlike its African competitors, has diverse tourist products which are comparable to none. Unlike other countries, Tanzania has more diversity in terms of wildlife, beaches, culture and history. Tanzania is considered one of Africa’s safest destinations. Safety and security are very important factors that determine the tourists’ choice for a destination. [The Guardian, February 16, 2016]

Despite the fact that Tanzania has been targeting low volume and high yield tourism as opposed to Kenya’s mass tourism, the local industry is still lagging behind due to other factors like a discouraging tax regime and various infrastructure shortcomings. There are a total of 53 different taxes, levies and charges that are applicable to tourist companies in Tanzania. The average effective tax rate for businesses in the tourism sector is 48 per cent, ranging between 37 and 63 per cent. [*The Guardian*, March 9, 2016]

Poaching, multiple taxes, poor infrastructure and inadequate promotion funds should be tackled for Tanzania to realize its target of attracting two million tourists annually in the next five years according to tourism players. Tourism provides 600,000 direct jobs to Tanzanians. Over one million people earn an income from tourism which supports parks, conservation areas and now community based wildlife management areas as well as farmers, transporters, fuel stations, spare parts suppliers, builders, tent manufacturers, suppliers of food and drinks. Multiple taxes, levies and fees on tourism make Tanzania an expensive destination. The contentious issue is modality and time spent in complying with intricate taxes. On promotion, tour operators fear that Tanzania could easily lose its tourism grip to Kenya as the north neighbor is taking serious measures to attract more tourists. Kenya has also waived landing fees for charter flights to the coast reduced park entry fees for tourists and urged operators to modernize their facilities. [Adam Ihucha, 2016]

The biggest challenge to the regional East African tourism is the anachronistic nature of the predominant tourism product, which was developed in the colonial era with the Western tourism market in mind. As a result, the tourism product is largely homogenous and mainly based on the region's natural resources. The majority of sub-Saharan African countries are viewed stereotypically as safari destinations. The need for regional tourism in East Africa is now even more critical given the uncertainty of the global economy, security concerns due to increased terrorist activity, and the climate change discourse in which long haul travel is increasingly being discouraged. Arguably, the future of tourism in the East Africa region lies not in its natural resources but its ability to create innovative tourism products. The strategies implemented by South Africa, the United Arab Emirates, Malaysia, Singapore and Thailand, could provide valuable lessons for member states. Marketing campaigns in Africa need to be stepped up in order to create awareness of the range of tourist products on offer. [Geoffrey Manyara, 2016]

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The current drawback why Tanzania trails behind some countries in tourism was its dependency on traditional tourism markets and a slow speed to diversify and get more visitors. It needs to target other countries like China, Russia, India, Brazil and South Africa [the BRICS countries]. These are emerging markets. Tourists from these countries are young, well-oiled with disposable income and are more adventurous than those from the traditional markets of Western Europe. [Zephania Ubwani, 2013]

3. Tourism in Zanzibar and the Isles

One alternative to the overdependence on wildlife safari tourism is Tanzania's marine tourism symbolized by the internationally famous island of Zanzibar. It is a unique coral island lying in the Indian Ocean, a short distance from mainland Tanzania. With Pemba, Mafia and 50 other islands, Zanzibar was originally an independent country until 1964 when it was united with Tanganyika to form Tanzania. [Sunday News, September 11, 2011] Zanzibar is a derivation of the two Arabic words *Zenj* and *Bar* or the land of the blacks. Zanzibar is an island only 50 miles long. There are more than 30 beaches in Zanzibar and some are isolated. Zanzibar's coastline is mainly a shallow slope allowing lush coral build-ups and providing a natural home for thousands of marine animals. Because of its location, Zanzibar enjoys warm currents almost year round. Perfect for spawning, one can see a wealth of life just beneath the surface. Snorkeling is unparalleled along the rock outcroppings of Zanzibar's many beaches. Zanzibar's climate is equatorial. Days are filled with sun, but some heavy rainfall occurs during April and May. Best months to visit are from July through March, with February and March the warmest months. The Swahili are urbanized African Muslims, who have integrated many Asian cultural and architectural features into their own traditions. Towns like Zanzibar,

Mogadishu, Pate, Lamu and Mombasa are still thriving today. Indian, Arabic and African building traditions blend together to form a unique and cosmopolitan architectural heritage of the Swahili culture. Swahilis are famous for its spices. Cinnamon, cloves, pepper, vanilla and many other spices grow on the spice plantations of the coast. The Swahili food is exotic and spicy flavored. The coconut is used in almost every dish. In the midst of the Indian Ocean, fish and seafood of course have a major importance. [Daily News, January 8, 2011] Oman defeated the Portuguese and took control of Zanzibar in 1698. In 1832, the Omani sultan, Said bin Sultan, made Zanzibar his capital and established a thriving spice trade and a major transit route to the West. It covered an area from the coasts of two East African countries, Kenya and Tanzania before the Germans gradually occupied most of it in the 1880s. The British gained control of the island as a protectorate in 1896, although it was still considered a sultanate, and granted it independence in 1963. After that, the island was ruled by sultans who were descendants of Said Bin Sultan. Zanzibar’s Arab minority won control of the parliament in July, 1963, leading to a coup by a frustrated African majority The Zanzibar revolution in 1964 paved the way for what is now the modern day republic. [Daily News, September 18, 2010]

Cloves, Zanzibar’s main cash crop, was introduced in the Isles in 1818, and flourished in the tropical climate and fertile soil of the western areas of both Zanzibar and Pemba. By the middle of the century the place was the world’s largest producer of cloves and the largest slave trading center on the East African coast. There are a number of challenges facing the production of cloves in Zanzibar at the moment. The government is grappling with the problem of dwindling production of the crop and is taking measure against it. [Ali Sultan, 2011] Only seven per cent of the world supply of cloves came from the Isles in 2011. The market share was decimated by a fast moving world market, coupled with Tanzania’s failed experiment with socialism in the 1970s and 1980s. Indonesia now supplies 75 per cent of the world’s cloves. Aside from their culinary uses, cloves are also commonly used in painkillers in dental emergencies. [Rosemary Quipp, 2011]

In the 1980s after the clove world market price tumbled, Zanzibar, whose economy hinges on the crop, saw the tourism industry as the best alternative for its economic growth. The Zanzibar Tourist Commission [ZTC] and the Zanzibar Investment Promotion Agency [ZIPA] were established in 1996.

Zanzibar’s first President and Revolutionary Council Chairman, Mzee Abeid Amani Karume, was a man of great vision, mission, vision and devotion that enabled him to take bold decisions that led to successful implementation of ambitious projects during his eight year rule. It was Mzee Karume who initiated plans for developing and promoting the tourism industry in the isles and turned it into a top tourism destination offering upmarket products across the board. His dream to turn the isles into a most exotic diverse island destination in the Indian Ocean region has finally come true. After 52 years, the tourism industry is a great spinner of foreign exchange and a great contributor to the isles’ gross domestic product [GDP]. It accounts for 26 per cent of GDP and generates 80 per cent of foreign exchange. It has created 14,000 direct jobs and 45,000 indirect employment opportunities. [Daily News, January 12, 2016]

Zanzibar is richly endowed with both natural and man-made tourist attractions which are the basis for a vibrant tourism industry. Some of these attractions are beautiful and virgin beaches natural forests endowed with rare animal species such as *kima punju*, old Stone Town building with ancient architectural features. Handicraft works specific to Zanzibari culture such as the decorative Zanzibar doors and chests. Richness in various spices and fruits available all year round and a culture of friendliness and hospitality to visitors. The vision’s policy on the promotion of sustainable tourism is to develop a tourism industry which is culturally and socially responsible, ecologically sustainable and economically viable and to promote Zanzibar as the destination for tourists in terms of historic cultures and beach holidays. The vision’s objectives of sustainable tourism include utilizing more effectively the tourism

potential to generate more income, employment, human resources development, foreign exchange earnings while protecting the environment, Zanzibar's culture and traditions. The Government is dedicated to diversify the tourist attractions to achieve balanced growth of the tourism industry and maximum benefit, develop Zanzibar as a single holiday destination by building up other product elements, in particular beach resorts, cultural attractions and aggressive marketing programmes. [*Daily News*, January 12, 2016]

Initially the early tourists from Italy, South Africa, the UK, Spain, Germany and the US were low budget tourism known in tourism lingo as "backpackers". The Government was therefore forced to attract investors for constructing high class hotels in tune with the tastes of the high-budget tourist. The government injected money for the needed infrastructure. In 2015, there are a total of 350 hotels in Unguja alone with a total of 7,743 rooms and 15,550 beds while in Pemba there are 25 hotels with a total of 231 rooms and 420 beds. The government is currently starting to develop various areas in Pemba, particularly in an 8 kilometer beach stretch named Vumawimbi, the longest beach stretch in East Africa. The first high class hotel of its kind has been constructed in the Indian Ocean at Makangale with its one room 13 meters under the sea. Zanzibar currently boasts 25 five-star hotels, 11 four-star hotels, 27 three star hotels, 16 two star hotels and 60 one star hotels. Lack of a national carrier affects the growth of the country's tourism industry. [*Daily News*, January 12, 2016]

According to the International Marketing Strategy for Tanzania [2013] which is compiled as a 129 page document whose 28 page summary is in circulation, one of the twelve strategic goals is to increase the market share of the "spice islands" of Zanzibar from 26 per cent in 2013 to at least 30 per cent of the total number of tourist arrivals in 2018. Zanzibar's products include pristine beaches, turquoise seas and history for medium to high value tourism. The target groups are adventure seekers, nature lovers, tourists loving sun, sea and sand, honeymooners, couples, families and small groups of friends who want to experience something special together, both the local culture and natural beauty. Another group is the philanthropists [conscientious travellers] concerned about responsible tourism. This group comprises tourists aware of the effects of tourism on the environment and on the economy of the local communities living in the places they visit. They are looking for responsible ways to interact with the local communities and their cultures and with the environment. [Apolinari Tairo, 2013] The Ireland based online travel magazine Fly Cruise Stay recognized Zanzibar as a heaven on earth, with natural white sandy beaches, tropical landscapes and crystal clear blue waters. Zanzibar is a popular choice for honeymoons. [Felix Lazaro, 2015]

Zanzibar benefits from tourists who travel directly to Kenya and other parts of Africa as they normally extend their holidays to the cultural / historical Islands. However, the latest statistics from the Zanzibar Commission for Tourism [ZCT] indicate that the islands recorded a decline in the number of arrivals in 2015. The number recorded in 2015 was 294,243 down from 311.891 in 2014. Terror attacks in Kenya, the Ebola disease in West Africa and threats in other parts of the world are to blame for the decline in tourism numbers visiting the Islands. If political disputes over the nullification of the general election results in October, 2015 deepens, the fragile tourism industry may be affected. Politicians need to understand that tourism, the main leading contributor to the economy, should be protected by avoiding violent conflicts and unnecessary tensions. [*Daily News*, February 10, 2016]

Charter flights from abroad, transporting tourists to Zanzibar, are expected to increase after Ukraine announced the launch of direct flights to the islands beginning on February 12, 2016. The first charter flight with about 180 tourists landed at Abeid Amani Karume International Airport [AAKIA]. Having tourists from emerging tourist markets such as Ukraine and other Asian countries was the focus of the government. Zanzibar has recorded an increase of tourists from Israel, China, Russia, India and Poland. Tourists come to destinations where there is peace. [Isa Yusuf, 2016]

Mafia Island, slightly smaller than New York City and 50 kilometers from mainland Tanzania, is serene on land but underwater it is a protected marine preserve that offers some of the most magnificent diving and snorkeling in the region, perhaps the world. There are sea turtles, stingrays and the occasional white tipped reef shark troll these waters nearly year round. While few modern travellers know its name, Mafia has drawn international visitors since at least the 11th century, when it served as an important trading base for Shirazi sailors who controlled the region. Later, the island became a hub for the Middle East slave trade then a military base for German, and eventually British, colonists. The island’s name has nothing to do with organized crime. It likely derives from the ancient Arabic word for “archipelago”. For the past century, Mafia and its 40,000 residents have been mostly ignored by the outside world, reached only by slow ferries from Tanzania. [Sunday News, February 6, 2012; Brendan Spiegel, 2012]

That began to change in 1995, when the World Wildlife Fund and other environmental activists successfully lobbied the Tanzanian government to protect the southern half of the island and the surrounding waters as the Mafia Island Marine Park. The 510 square mile preserve is home to 400 species of fish and 48 types of corals, as well as giant green sea turtles and at least a few nearly extinct mantee-like dugong. With fishing and other industry sharply curtailed inside the preserve, Mafia’s rich reefs soon began attracting the attention of divers. Regular air service from Dar es Salaam, Tanzania’s main entry, was added in 2006. The number of lodges and guesthouses on the island has mushroomed to roughly two dozen in 2012. In 2010 the total number of international visitors was a modest 4,100 people. [Sunday News, February 6, 2012; Brendan Spiegel, 2012]

The Indian Ocean island of Thanda is a beach residence of Swedish billionaire Dan Olofsson and is new private island resort off the coast of Tanzania. It is being pitched as offering absolute exclusivity for families and friends to rent on a sole use basis and is completely off grid and solar powered. Away from the island, guest will be able to learn about local Swahili seafaring culture on nearby Mafia Island, home to 60,000 people. Thanda Island has also partnered with the Tanzanian Marine Parks and NGO, Sea Sense, on a range of marine conservation and education programmes including research and conservation projects on sea turtles, dugongs, dolphins whale sharks, coral reefs and marine reserves. The island is surrounded by its own private reef, with a one kilometer exclusive use zone and sailing boats, stand up paddle boards and kayaks are available for use. Diving to see whale sharks or the endangered dugong is also an option. There is a powerboat zone outside the marine park allowing for water skiing, jet – skiing, wake- boarding and tubing. Exclusive use of Thanda Island starts from US \$10,000 per night, with a minimum stay of 3-7 nights depending on the season. It is likely to be the most expensive accommodation room in Tanzania. The all-inclusive rate includes the team of dedicated staff, boat transfers from Mafia Island and all activities offered on the island, along with all meals and drinks including a selection of wines and champagnes. Forbes magazine which featured Thanda Island in a recent report, described the hotel as an “Indian Ocean paradise” about a 40 minute helicopter flight southeast of Dar es Salaam. [*Daily News*, February 12, 2016; *The Guardian*, March 4, 2016]

4. Water Based Tourism in Tanzania

4.1. An Overview of Aquatic/ Water Based Tourism in Tanzania

As mentioned above Tanzania is renowned for the attractiveness of its coastal and marine environments, high marine biodiversity and rich marine and coastal resources. The coastal and marine environments include among others: major estuaries, mangrove forests, coral reefs, sandy beaches, cliffs, seagrass beds and muddy tidal flats (Akwilapo, 2007). In the same environment are a wide range of important and valued species including an estimated 150

species of coral in 13 families, 8,000 species of invertebrates, 1,000 species of fish, 5 species of marine turtles, and many seabirds.

Coastal zones attract the largest number of tourists and the largest growth in the tourism sector is recorded in marine areas (Gladstone, et al., 2013; UNEP, 2009). In Tanzania the coastal zone includes the regions of Tanga, Coast, Dar es Salaam, Lindi and Mtwara. For potential the islands of Unguja and Pemba in the Zanzibar are of greater importance. According to the *Guidelines for Coastal Development in Tanzania* [2003], some of the main coastal tourist attractions being visited can be described as follows:

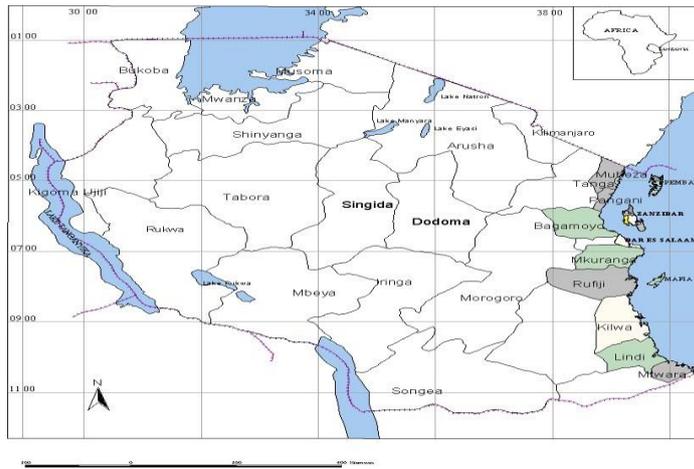
1. Bagamoyo town and the adjacent Kaole Ruins
2. The beaches and near-shore islands around Dar es Salaam and Mafia Island
3. The Saadani Game Reserve (soon to be upgraded to National Park status)
4. The history, culture and natural beauty of Pangani
5. The expansive beaches south of Dar es Salaam
6. The World Heritage sites of Kilwa Kisiwani and Songo Mnara
7. Untouched beaches of Mtwara
8. The unique Swahili coast culture and lifestyle
9. Traditional sailing vessels
10. Excellent coral reefs for diving and snorkeling

Activities in coastal and marine areas are diverse. They include (walking, collecting rarities, animal watching, tours), coastal waters (swimming, surfing, boating), deep waters (yachting, mammal watching, fishing), underwater activities (scuba-diving, shark feeding) (Gladstone, et al., 2013). Tanzania has a fringe of coral reefs along the coast all the way from north to south. It offers excellent sites for snorkeling and scuba diving. The inshore waters are characterized by a wide range of tropical fish species ranging from coral reef fishes to oceanic species like the scombrids. (Coastal Tourism Working Group, 2001) It also has birds, turtles as well as various coastal habitats like mangrove forests, salt marshes, deltas, bays and lagoons which are home to numerous species of fish, crustaceans mollusks, birds, and insects. Tanzania is practically bounded on all sides by water. It has the Indian Ocean to the east, the Great Rift Valley lakes of Africa (Lake Victoria to the northwest, Lake Tanganyika to the west and Lake Malawi/Nyasa to the southwest. All these have a wide range of diving possibilities, from shore diving, boat diving, living aboard a boat as well as snorkeling. It is thought that activities on these water bodies are more than what is presently documented. Moreover, there is much interest in scuba-diving which can become an important economic factor in terms of tourism development.

4.2. *Understanding Scuba Diving and Snorkelling*

SCUBA stands for Self Contained Underwater Breathing Apparatus, and describes the breathing gas cylinders that allow divers to breathe underwater (www.scuba-monkey.com/scuba-diving). Scuba diving allows an individual to explore the amazing sights of the underwater world, from ocean or lake creatures and plant life to shipwrecks and underwater caves (*Ibid*). Free diving is just diving in shallow water as opposed to scuba diving. Snorkeling is the practice of swimming on or through a body of water while equipped with a diving mask, a shaped tube called a snorkel (www.diversreefkarachi.com).

Figure 1: Map of Potential Areas for Diving and Snorkeling Tourism in Tanzania



4.2.1. Comparison of Scuba Diving and Snorkeling

Both snorkeling and scuba diving require a mask, snorkel and fins while allowing an uninterrupted view of the underwater world. However, the two differ in many ways, some of which are listed in Table 1.

Table 1: Comparison of Scuba Diving and Snorkeling

Snorkeling	Scuba diving
<ol style="list-style-type: none"> 1. Snorkeling requires only the ability to swim and breathe because the majority of time is spent on the shallow water. 2. Training may not be required simply because an individual may merely place the mouthpiece in the mouth, adjusts the mask and puts the face in the water. 3. Snorkelers often see turtles on the surface when they ascend for fresh air. 4. Divers often use snorkeling as a way to find a new diving site.  <p>Source: www.scuba-monkey.com</p>	<ol style="list-style-type: none"> 1. Scuba diving is a total immersion in deep water where divers can go to greater depths and explore things because they are more equipment that supplies them with more air than snorkelers. For that reason they need more energy to carry a container of a compressed air at their back. Divers’ equipment includes, but is not limited to, a mask, fins, snorkel, wetsuit, buoyancy control device, regulator, depth gauge, air gauge and mouthpiece. 2. Scuba diving requires some training depending on the diver’s need. Training can take a couple of days before one can start diving. 3. In most cases divers do not see turtles because majority are looking deep down to enjoy their time under the water  <p>Source: www.scuba-monkey.com</p>

4.3. Theories and Concepts Contributing to the Development of Scuba Diving

Leiper (2004) explains that a conceptual model helps to explain complex phenomena and processes in tourism (Leiper 2004 cited in Dimmock and Musa, 2015). A conceptual frame work can, for example, highlight key elements and simplify important associations in otherwise complex stakeholder relationships that influence tourism development processes and outcomes (Mair and Jago, 2010). This paper uses a system approach in proposing a conceptual model for scuba diving tourism in Tanzania. The system approach was used by Dimmock and Musa 2015 in describing the scuba tourism system where they propose a collaborative approach in sustainable development of scuba diving tourism. Their view is holistic. It includes what they called fundamental elements or stakeholders for Scuba Diving Tourism Systems (SDTS). These include scuba divers, the marine environment, the host community and the scuba diving tourism industry (including all associated industries), adaptive management and leadership. All of these are included to ensure the sustainability of marine resources and experiences (Dimmock and Musa 2015). The authors insist on the importance of the host community in the whole system. Community inclusion in any tourism system has been an agenda for decades and its importance has been seen in sustainability of the same (Mair and Jago, 2010; Dimmock and Musa 2015; Ezreth 2014).

The Coastal Tourism Working Group (2001) gives some tips on how to establish and maintain strong relationships between hotels and coastal communities in Tanzania. The system approach is thought to be used in the development of tourism in the periphery regions where it is seen as a modeling technique for framing, understanding, and discussing complex issues and problems (Blackman, 2004). The system approach helps corporate managers improve their understanding of industrial processes for tourism competitiveness. The approach is also widely used by public and private sectors for policy analysis and design.

5. The Potential for Scuba Diving in Tanzania

5.1. Rationale for Scuba Tourism in Tanzania

5.1.1. Global demand for scuba diving

Scuba diving is now a multibillion dollar industry and one of the world's fastest growing recreational sports (Ong and Musa, 2011 cited in Musa and Dimmock 2012). According to the Professional Association of Dive Instructors (PADI), the global number of certified divers in 2003 was 12.9 million, while 2008 was 17.8 million, compared with 22.2 million in 2013 (PADI, 2014). Since 1967, PADI has issued over 23,000,000 diver certifications globally (www.tdcgroup.org/investorfiles/PADI). The statistic shows a growing number of certified scuba divers giving a high potential market for this product. However, the statistic does not include the introductory courses in scuba diving even the non diving certificate. This means that the market for scuba diving is huge and it offers a lucrative income. Scuba diving major markets include America, Europe, Asia Pacific and Japan. Among the factors that contribute to the appeal and popularity of recreational scuba diving has been the development of safe and affordable diving equipment (Davis and Tisdell, 1995 cited in Musa and Dimmock, 2012), along with technological advances that enable marine craft to more easily access remote scuba diving sites (Parker, 2001 cited in Musa and Dimmock, 2012) and the growing interest in learning about and experiencing natural environments (Dimmock, 2009; Harriott, Davis, and Banks, 1997 cited in Musa and Dimmock, 2012). Scuba diving has been a major recreational activity in America, Malaysia, Singapore, Greece, UK and South Africa although recent statistics show that scuba divers have been moving to more than 91 countries in the world.

5.1.2. Expanding the Tourism Experience

Tourism development in Tanzania is currently facing difficulties because it has only a narrow range of tourism products. The industry is presently dominated by wildlife safari tourism with some cultural and adventure tourism as well. Scuba diving is thought to offer not only another type of tourism but also an addition to the existing ones. Scuba diving has become a global product in a niche market in recent year. However, it is rarely mentioned in the Tanzanian tourism marketing programs listing available tourism products especially by the Tanzanian Tourism Board [TTB]. Water tourism is rather undeveloped in the mainland water bodies, along the Indian Ocean coast and even in the off shore islands around Zanzibar. This is probably because the Government and investors’ have just focused on wildlife tourism. According to the Coastal Tourism Working Group, tourists are increasingly looking for a diversified product that allows them to engage in a number of different activities within a limited time frame, and therefore a relatively small geographic area. For example, a tourist may want to spend a week at a beach resort, relaxing in the sun and engaging in various water sports. In addition to these traditional sun and sand activities, a tourist may also want to do some hiking, learn about the history and culture of the location, observe traditional cooking or farming methods, go bird-watching or see how local handicrafts are made. The destinations that can complement the traditional sun and sand activities with other unique experiences will have a major advantage over one-dimensional beach destinations even though the market for these beach-only destinations will continue to exist. The working paper presents challenges for product expansion, development and the maintenance in marine areas. Consequently scuba diving can be considered as a potential product to be developed not only along the Indian Ocean coast but even in all the other water bodies located throughout the country.

Figure 2: Potential Diving Areas in Tanzania

a. Lake Victoria



Source: www.africa-discovery.com

b. Lake Malawi/Nyasa



Source: www.africa-discovery.com

c. Lake Tanganyika



Source: news.georgiaaquarium.org

5.1.3. Conceptual Model for Scuba Diving Development in Tanzania

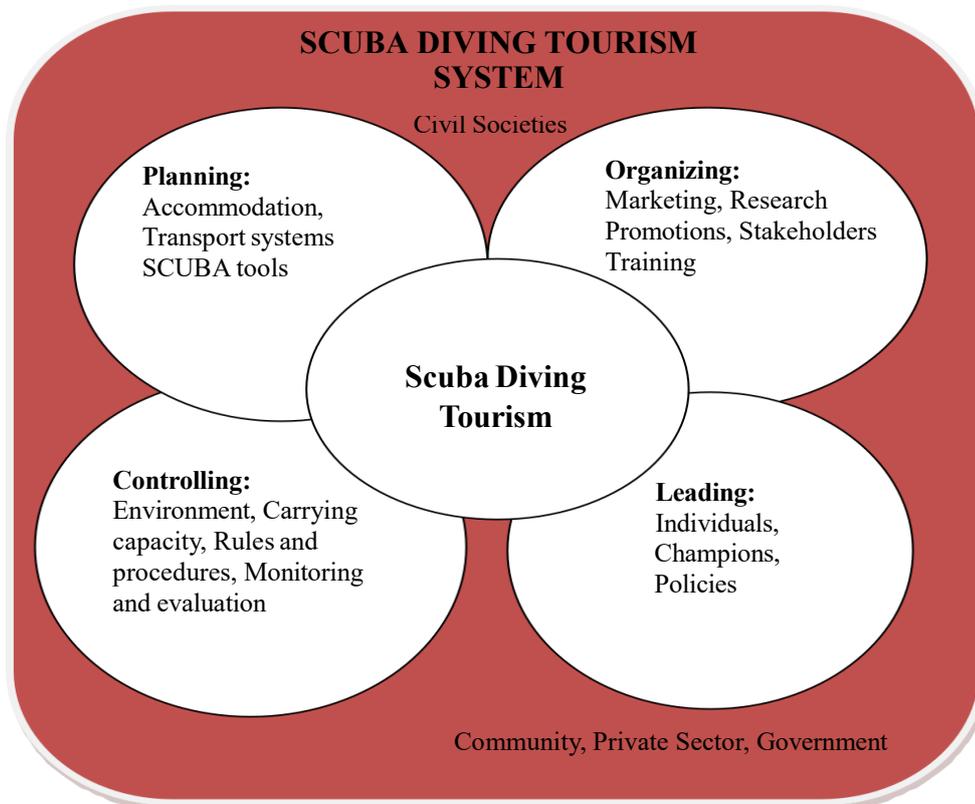
Tourism is a system of activities that inevitably touch the environment and the community in which it takes place. Dimmock and Musa (2015) noted that there have been research comprising a broad inquiry extending from marine environment impacts through to human physiology, health and safety as well as the motivation and satisfaction of scuba divers. They argued that those studies support an effort to understand the issues involved in scuba diving and its related tourism. Less than 30 per cent of these studies actually integrated multiple stakeholders and took perspectives in a holistic or systematic way. Scuba diving and snorkeling as well as the local businesses that support the sea activities in coastal and marine waters generate value for participants when it is well connected to the community.

Scuba diving is an economically important industry. This is evident from by the number of locations currently trying to promote their marine resources in an effort to become scuba diving destinations and scuba diving hotspots (Dimmock and Musa 2015). Scuba diving and snorkeling have both market and non market values. The market value is normally examined by how much money the diver has spent to support the host economy. The non-market value is associated with the value divers place on the marine resources they use beyond the payments they have made to access such resources. Scuba diving may be valuable to ecotourism. It may provide coastal areas with economic incentives to protect and preserve local marine wildlife and habitats. However, when the values and rights of the local community are violated, a conflict of interest may arise. Normally, such a community may be an obstacle to the development of the intended tourist product.

The non- market value is obviously very important for the sustainability of the marine resources. Hence, environmental awareness is expected to be of paramount importance in developing scuba diving tourism. Divers put more value on the environment when they see healthy corals, many sea turtles and other marine creatures. In America, where scuba diving is much more practiced, pollution is the most damaging threat to ocean health. It is followed by unsustainable fishing, loss of habitat, loss of biodiversity and, finally, climate change (www.oceana.org). In Tanzania pollution exists but not in high concentrations because scuba diving is a new product. Unsustainable fishing and loss of habitat are the most alarming indicators. Consequently, the cost of environmental destruction must be addressed during product development stage to avoid a loss of preference by divers especially when the product matures. Moreover, this must be done to avoid the destruction of the environment for other marine creatures when the ecosystem is disturbed. For this reason, it is very important to consider environmental management issues. If possible, in the beginning of this new product development guidelines for scuba diving in Tanzania should be developed. Thailand established and implemented environmentally friendly guidelines for dive operators and divers for sustainability of diving tourism in order to protect and conserve coral reef (www.greenfins-thailand.org). Learning from other parts of the world would provide a good way for developing scuba diving tourism in Tanzania. Other countries which have benefited from scuba tourism

include Malaysia, Indonesia, United Kingdom, Greece and South Africa.

Figure 3: Proposed Model for Scuba Diving Tourism Development in Tanzania



Source: https://www.researchgate.net/figure/Proposed-Model-for-Scuba-Diving-Tourism-Development-in-Tanzania_fig1_348336839

5.2. Challenges for Scuba Diving Tourism Development

5.2.1. Financial Resources

Despite the fact that Tanzania is surrounded by water bodies, only a few areas have actually developed scuba diving tourism. This is because scuba diving requires high investment. Normally, a well-trained diver has to use proper equipment for safety. Protection of archaeological resources in marine areas includes the maintenance of a clean, beautiful and healthy environment which respects the values and beliefs of the host community. This maintenance includes prohibiting any act of bringing to the surface or moving objects of archaeological or other significance located in the deep water. Where consumption of marine resources is possible, a study has to be conducted to determine what can be consumed and in what amount. Despite these challenges, there are many potential scuba diving areas in Tanzania that include:

- a. **Pemba Island:** Situated on the Indian Ocean Island, this island offers ocean diving where it is possible to see sharks, whales and many other local marine creatures.
- b. **Member Atoll, Zanzibar:** This is the self-proclaimed tropical fish capital of East Africa.
- c. **Leven Bank:** This is located far off the northern tip of Zanzibar and is populated by big game fish, tuna, barracuda and kingfish.
- d. **Mafia and Mesali Island:** These are famous for whale and shark.
- e. **Lake Tanganyika:** This is the deepest fresh water lake in Africa and the second

deepest in the world. Its water is clear with hundreds of species of cichlid, some of which can vie for vivid colors with marine species.

- f. **Others:** These include Lake Victoria and Lake Malawi/Nyasa where diving has not yet been commercialized.

5.2.2. *Training*

Because it is sometimes dangerous, scuba diving requires training especially in areas of actual diving and protecting the marine environment. Training develops confidence among the divers. Diving experts are at the heart of the good training. They are required to be at the diving centers all year round.

5.2.3. *Lack of Inter-industry Cooperation*

Historically, the tourism industry is in fact disconnected. In accordance with the systems approach proposed in this paper, earlier studies on tourism define tourism as a discipline associated with a chain of activities. This chain must be seamless. In Tanzania, however, tourism of this kind is not yet practiced. As an academic discipline tourism should open up to other potential areas for a country's development rather than be seen as an industry that only operates on the basis of individual interests. Scuba diving tourism is thought to have the potential to unlock other areas of the economy such as agriculture, mining and manufacturing. Consequently it will require a lot of investments.

5.2.4. *Detrimental Impact of Scuba Diving*

Fortunately, divers' impact on coral reefs has been widely documented in many areas of the world (e.g., Dixon, Scura, and Hof, 1993; Hawkins and Roberts, 1992; Riegl and Velimirov, 1991; Tratalos and Austin, 2001 cited in Musa and Dimmock 2012). In the Northern Red Sea, significant coral breakages and higher rates of tissue loss occurred in areas frequented by divers (Riegl and Velimirov, 1991 cited in Musa and Dimmock 2012). Damage to coral colonies was evident in heavily dived sites in Egypt (Hawkins and Roberts, 1992 cited in Musa and Dimmock 2012). Reduced biological diversity in coral communities has been reported as an impact of scuba diving in the Caribbean island of Bonaire (Dixon *et al.*, 1993 cited in Musa and Dimmock 2012). Thus, in developing scuba tourism, Tanzania should consider these detrimental effects and put in place interventions to prevent or overcome them.

Figure 4: Pictorial Presentation of the Negative Impact of Scuba Diving and Other Tourism Activities on Coral Reef



Source: www.africa-discovery.com

5.2.5. Marketing

Marketing poses another big challenge for scuba diving tourism development. Since diving is a niche market, its market is special and thus requires a lot of investment in target marketing. However, once known and positively experienced, it is easy to receive customers through a word of mouth. Thus, the most important marketing tool in scuba diving is the quality of the product and the ability of the environment to provide maximum satisfaction to the customers. Also digital marketing using different technological applications is one of the major factors that help in reaching the customers more easily. However, technology requires high investment while the return is very slow.

6. Conclusion

It is thought that the components of the proposed model would be thoroughly studied to ensure sustainable development of scuba diving tourism in Tanzania. Divers require quality marine environments evidenced by quality of underwater sights. Quality defines the value placed on marine sites both by divers and the host community. Research has shown that where community interest are ignored and get no share of the revenue from coral reef they put no interest in preserving them. Thus community priorities should be defined for sustainable development of the product. A product is always good when it develops good experience. Such experienced in scuba diving may be achieved when other services such as accommodation, food, transports and other businesses are developed in the diving areas. Generally the scuba diving tourism system requires careful management and responsible use of the marine environment.

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