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Effects of the COVID-19 pandemic on the main Zanzibar tourism sector policy systems, activities and areas

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Abstract

The Zanzibar tourism sector has been one of the most affected by the global COVID-19 pandemic. The restrictions on mobility and closures of companies in the global economy, either totally or partially in the 2020-2022 period, have had a significant negative effect on the tourism sector performance. The paper examines the effects of the COVID-19 pandemic on the main tourism sector systems, areas and activities in Zanzibar. The paper uses a policy model articulating effects of COVID-19 on socio-economic human developments as cascading across economic entities, sectors and activities. This policy research employed several independent but complementary research methods, approaches and collected primary data and information using stakeholder's consultations and in-depth interviews with key informants.

The paper finds that half of the consulted stakeholders had the view that the COVID-19 had high negative effects on the performances of the Zanzibar tourism sector activities and areas. A quarter, considered that COVID-19 had moderate effects and another quarter, considered that COVID-19 had low effects on the performances of the tourism sector activities and areas. The safety and security, foreign exchange earnings, the accommodation sector, and income/revenues were perceived as mostly negatively affected the tourism industry and its counterpart sector areas. The effects of COVID-19 pandemic were less and insignificant in some few tourism activities and areas such as the tourism infrastructure sector, the environment tourism sector and the domestic tourism in Zanzibar.

The paper recommends that Zanzibar continue envisioning being one of the top tourism destinations of the Indian Ocean, offering an up market and high quality product across the board. The current tourism sustainable development policy objectives aim at controlling and improving safety and security, optimal foreign exchange earnings systems; modern tourism accommodation systems and efficient income/revenue flows from the tourism sector and industry. The tourism sector is a vital socio-economic development factor; empowering the people of Zanzibar to successfully own, manage and operate their life and thus simultaneously develop, plan, own, manage and promote national economic systems, activities and areas.

Keywords: Zanzibar tourism COVID-19 effects

Introduction

The notorious COVID-19 pandemic in the 2020-2022 period has not only been a health security crisis but also a humanitarian crisis that is threatening to leave deep social, economic and political scars for years to come, particularly in countries already weighed down by fragility, and limited resources (UNDP, 2020) ^[34]. The restrictions on mobility and closures of companies in the economy which were either total or partial during certain periods in the 2020–2022 periods have had significant negative effects on the tourism sector. The Zanzibar tourism sector has been one of the most affected by the global COVID-19 pandemic. There have been negative effects on the tourism sector performance in terms of systems, areas and activities in Zanzibar' investments, production, consumption patterns and consequently social welfare developments (Kock, 2020 and Semboja, 2022) ^[13, 29].

Objective, Methods and Scope

The paper examines the effects of the COVID-19 pandemic on the performances of main tourism sector areas and activities in Zanzibar, during years 2020-2022. The paper is based on the Zanzibar tourism policy model analyzing the effects of COVID-19 pandemic on socio-economic developments are cascading across economic entities, sectors and activities

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(UNDP, 2020 and Semboja, 2022) ^[29, 34]. The study used partial policy sensitivity analysis as an ex-post evaluative method to determine perceived views on the effects of changes of exogenous variable on the endogenous variables namely, the main tourism sector areas and activities in Zanzibar. The study uses one of the simplest and most common approaches involving the changing of One-factor-at-a-time (OAT), to see what effect the COVID-19 pandemic produces on these tourism performance variables (Sobol, 1990) ^[31].

Based on the tourism policy model, the ZCT-UNDP 2021/22 research project employed several dependent but complementary methods and approaches (Semboja, 2022) ^[29]. These included ^[1] desk study (literature reviews); (2) collection of secondary data and information) and ^[3] field research survey and ^[3] data entry, management and policy analysis. The study collected primary data and information using direct consultations and in-depth interviews with key informants. Table 1 summarizes the number of planned and consulted stakeholders by major categories in Unguja and Pemba. The field research survey planned, sampled and managed to cover a total of 191 consulted stakeholders.

The main strategically sampled and consulted stakeholders were from the government entities (10), hotels (60), tour operators, (30), Small Medium Enterprises (SME) (30), travel agencies (6), local communities (25), Non-Government Organizations (NGOs) (20), Civil Society Organizations (CSOs) and Community Based Organizations (CBOs) (20), and common tour visiting areas (10). The stakeholders interviewed included the Ministry of Health, Social Welfare, the Elderly, Gender and Children as well as the Ministry of Information, Tourism and Heritage-Zanzibar; private sectors; CSOs and other relevant stakeholders in the tourism value chain including hotels and hospitality, travel, tourism operators, arts and crafts, cultural performances, SMEs, women, youths, and local communities in the tourism value chain. These were selected based on their knowledge, experiences and/or diverse views on the sectors and COVID-19.

Table 1: Planned and consulted stakeholders by major categories in Unguja and Pemba

No	Stakeholder Categories	Planned		Consulted Stakeholders	
		Business Firms	Others	Unguja	Pemba
1	Government Entities	-	10	10	-
2	Hotels	60	-	40	20
3	Tour Operators	30	-	27	3
4	SMEs	30	-	20	10
5	Travel Agencies	6	-	6	-
6	Local Communities	-	25	15	10
7	NGOs, CSOs & CBOs	-	20	15	5
8	Common Tour Visiting Areas	-	10	7	3
Sub-Total		126	65	140	51
Grand-Total		191		191	

Date Sources: ZCT, Field Research Survey, 2021

Format of the paper

The paper has four main sections. Section 1 is the introduction on articulating the paper objectives and research methods and scope. Section 2 presents the Zanzibar Tourism Policy Model.

Section 3 is the main section analyzing the effects of COVID-19 on the tourism sector and industry in Zanzibar.

This section presents the results of the perceived views of the consulted tourism industry firms and other related sectors on the effects of COVID-19 on the specific tourism policy activities and areas in Zanzibar. These are the effects of COVID-19 on the incomes from the tourism sector and industry (3.10), on education and training in the tourism sector (3.2); on foreign exchange earnings; (3.3) on the tourism environment, (3.4) on the culture and traditions in the tourism sector, (3.5), on the tourism accommodation sector, (3.6); on the tourism infrastructure, (3.7); on the domestic tourism in Zanzibar, (3.8), the tourism seasonality status, (3.9); on tourist image status on the tourism sector (3.10) and effects of on tourism sector safety and security. Section 4.0 is the conclusion consisting of main findings and policy recommendations.

The Zanzibar tourism policy model

Section 2 presents the Zanzibar Tourism Policy Model. The section defines, identifies, specifies and determines general and specific tourism sector systems, areas and activities in Zanzibar as articulated in the Zanzibar Tourism Policy 2007 and other national policy documents, (RGoZ, 2007) ^[24]. The general objective of Zanzibar Tourism Policy is to promote tourism industry that emphasizes sustainability, quality and diversification, and which is culturally responsible, socially desirable, ecologically friendly, environmentally sustainable and economically viable. The image of Zanzibar abroad will work as a promising exclusive holiday destination, basically for historical, cultural attractions and beach holidays. Tourism is a vital socio-economic welfare development factor (SW) and can participate effectively in empowering people of Zanzibar to successfully manage their socio-economic activities, life and their sustainable development.

$$1 \text{ SW} = f(Y + Y_0 + Y_o) \text{ Where } o = \text{other economic sectors}$$

Where SW is the socio-economic welfare development, Y is the tourism sector activities and Y₀ are other equally important socio-economic sectors such as agriculture, fishing, trade, industry and social services. In turn, we consider the specific Zanzibar Tourism policy objectives, activities and areas (Y_i), to include the utilization of more effectively the tourism potential to generate more income (Y₁), human resources, (Y₂), foreign exchange earnings, (Y₃), while protecting the environment (Y₄), Zanzibar culture and traditions (Y₅) and diversification of the tourist attractions in order to achieve a balanced growth of the tourism industry and maximum benefit (Y₆). The main tourism sector policy objectives and target areas are formalized as follows;

$$2 \text{ Y} = (Y_1 + Y_2 + \dots + Y_N \text{ Where } i = 1, 2, \dots, n \text{ tourism activities}$$

Where other specific tourism objectives, activities and areas (Y_i) are strengthening the cultural industries including museums, theatres, cultural and community participation as a product diversification to harness tourism; emphasizing the best option for the development for the current accommodation in Zanzibar, improving the standard of quality for services and facilities to meet the challenges of long-term tourism development; enhancing the quality of and accessibility to the existing tourism infrastructure and developing one to cope with the demands of high class

tourism; and the economic, social, cultural and environmental positive impacts; encouraging domestic tourism and maximize its significance; addressing “reducing Tourism Seasonality” as a serious issue affecting the Tourism Industry in Zanzibar; enhancing the tourist image of Zanzibar to be original, trustful, attractive and address tourist safety and security issues cooperative as an important part of the government’s larger safety and security concerns. In turn, we define these specific tourism objectives and areas, (Y_i), as complex functions of tourism sector systems (S) {policies, laws, regulations and institutions}, resources (X), {capital equipment machinery and finance} other tourism sector areas and activities (Y_j), and public health (H), (Semboja, 2021) ^[29]. The performances of tourism sector areas and activities are complex function of systems (S), resources (R); other socio-economic sectors (Y_j) and health status of socio-economic entities (H) as follows;

$3 Y_i = f(H, S, X, Y_j)$ Where $j = 2, 3, \dots, m$ other areas / activities

We consider and introduce the COVID-19 pandemic as an indirect, external and global public health problem (H). The COVID-19 pandemic is a health risk, challenge and its effects are observed through the health of local population, workers and tourists as human resources.

* $H = h(\text{COVID-19})$ Where $h < 0$

That is, the COVID-19 pandemic risks are conceptualized as a public health threat, challenge or the possibility that the pandemic (as events) will adversely affect socio-economic entities (individuals, families and communities), sectors (tourism sector) and actors (workers) ability to achieve their desired socio-economic welfare development objectives.

$4 Y_i f(H)$ where other factors are assumed constant

The above simple relations (1), (2), (3) and (4) define the Zanzibar Tourism Policy Model. The model articulates that *in the first round*; the COVID-19 pandemic directly affected human health systems, changing patterns of mortality and morbidity with differential distribution across countries.

The second round of COVID-19 transmission mechanism and effects revealed the fact that changes in the tourism production systems will induce changes in the human resource utilization, use of other resources and eventually changes in the tourism service charges, fees and final prices. The COVID-19 transmission mechanism is a health security and a risk effect on the tourism sector employment, management, engagement and operational capacities in the specific tourism objectives, areas and status as the exporting service sector leading to overall changes in the total tourism systems, activities and areas.

These effects have overall direct and indirect effects on the

socio-economic activities and actors as defined in the above relations. The first and perhaps the most direct; are the socio-economic costs to the health system, both public and private, of medical treatment of the infected and of outbreak control. The second are the fears of COVID-19 related infections resulting into stress, social distancing or closed tourism facilities, enterprises, commercial establishments, transportation, and public services—all of which limit freedom of movement, engagement, optimal utilization of human resource capacities and thus disrupting tourism activities and areas.

Effects of COVID-19 on the Tourism Sector and Industry in Zanzibar 2020/21

High Effects of COVID-19 on the Incomes from the Tourism Sector

Tourism is one of the world’s major economic sectors. It is the third-largest export category (after fuels and chemicals) and in 2019/2020 it accounted for 7% of the global trade. For some countries, it can be represented by over 20% of their GDP whereby in the Island of Zanzibar it contributes more than 20% to the total GDP and, in the overall, it is the third largest export sector of the global economy. Tax and non-tax revenues from tourism industry play a critical role in supporting small states’ development programmes and implementation of various policies.

Table 2 presents the perceived views of consulted tourism key informants and stakeholders on the effects of the COVID-19 pandemic on the Zanzibar Island incomes/revenues from the tourism sector. Table 2 suggests that many, i.e. about 50.45 % of the consulted firms had the views that the COVID-19 pandemic had high negative effects on the performance of incomes/revenues from tourism to the island of Zanzibar. This was due to the fact that the pandemic affected more the prosperity of socio-economic activities which led to the decrease in the contribution of various tourism activities to the Government in terms of sales, taxes and other charges in the hotels, restaurants and tour operation levies as well as other contributions ranging from entry fee to transportation charges, etc. In this regard, the onset of the COVID-19 pandemic has during 2020-2021, substantially derailed the economic growth of tourism sector, the key contributor to the national economy in terms of slowed socio-economic activities and revenue earnings.

Among the first measures taken by most SIDC countries were to restrain the movement of people from the COVID 19 countries as well as within the country as a measure to control the spread of the virus during March 2020 - June 2021. Consequently, RG oZ and URT also restricted arrivals from the affected countries, including Italy and China, both of which had in years 2020 – 2021 been the major source of tourists. This situation contributed to the decrease in operations of various tourism activities, and subsequently decrease in revenue collections (UNDP, 2020) ^[34].

Table 2: Effects of COVID-19 on the Tourism Sector and Industry in Zanzibar 2020/21

		V. Low	Low	Moderate	High	V. High	High	Rank
1	Income/Revenues	6.3	8.4	11.5	39.3	34.6	73.9	4
2	Education and Training	0.0	11	30.9	31.9	26.2	58.1	
3	Foreign Exchange Earnings	0.0	8.9	15.7	37.2	38.2	75.4	2
4	The environment in the tourism	0.0	12	72.8	6.8	8.4	15.2	-2
5	The Culture and Traditions	1.6	6.8	27.7	35.6	28.3	63.9	
6	The Accommodation Sector	2.6	3.7	19.4	37.7	36.6	74.3	3
7	The infrastructure of the tourism	26.7	25.7	37.7	7.3	2.6	9.9	-1
8	The Domestic Tourism	44.0	25.7	12	13.6	4.7	18.3	-3
9	The tourism seasonality status	5.2	7.9	26.2	53.4	7.3	60.7	
10	The image status on the tourism	34.6	28.8	13.1	10.5	13.1	23.6	
11	The Safety and Security	4.7	5.8	7.9	47.6	34.0	81.6	1
Overall Impact of COVID-19 on the Tourism Sector in Zanzibar		11.43	13.15	24.99	29.17	21.27	50.45	

Source: ZCT Field Research Survey 2021

Reduced number of tourists implies depressed hotel accommodation, restaurants, bar recreation, transport and other activities and closure of most if not all tourist hotels in Zanzibar, the majority of which are in Unguja, and decreased basic socio-economic activities and fall in all forms of tourism incomes. This was due to strong backward and forward economic linkages internal and regional transport business such as charter flights, food and beverage industry, culture and art, all of which have some implications to the security of jobs, government tax revenues and household food security negatively affected. Tourism has been major sources of employment, household salaries, income taxes and foreign exchange earnings, which were also severely affected as result of the sudden decline of tourist arrivals and low hotel accommodation occupancy rates in Zanzibar. Ultimately, the reduced earnings and domestic tax revenues pose a risk to the ability of governments to provide basic social services to the people. In Zanzibar, the return of tourism hinged on what has been a deeply socio-economic entities decisions as they weigh the risks of falling ill against the necessity of travel, although Zanzibar opened the door for the tourism sector. Also, the private sector backed developing global protocols for various travel industries, including the call for more rapid testing at airports to boost confidence in traveling. The emphasis on establishing immediate risk management measures to overcome and mitigate the consequences likely to happen as the level of risk on the revenue collection is progressively high and is inevitable. Others may ascertain that if the existence of the COVID-19 pandemic persists, then these measures including provision of loan and grants should be emphasized for the prosperity of the businesses and income of the citizens of Zanzibar.

High Effects of COVID-19 on Education and Training in the Tourism Sector

Tourism in Zanzibar is a strategic socio-economic activity, and tourism education and training is believed to be a major input and the backbone in supporting the dynamic tourism industry. Education and training is a human resource development strategy aiming at mobilizing and sensitizing the people of Zanzibar to realize the contribution of other resources in human resource development. The RGoZ encourages broad based education, training and particularly vocational training to cope with the changing structure of labour markets, technology, products and the demand for global competitiveness. The RGoZ advocates the educational and training systems which incorporate tourism

training that conform to changes of technology and respect of moral as well as ethical values, spirit of self-confidence, self-esteem and tolerance.

Table 2 presents perceived views on the effects of COVID-19 on education and training in the tourism sector and industry in Zanzibar. Table 2 suggests that many, i.e. about 58.1% of interviewed firms had the view that COVID-19 has high impacts on the education and training in the tourism sector and industry in Zanzibar. Like other many SID countries Zanzibar decided to temporarily close all schools, colleges and universities during first COVID-19 wave.

As per these international and national public health guidelines for COVID-19, many countries implemented basic confinement and other restrictive measures to prevent further transmission and respond to the outbreak of COVID-19 which impacted many world students' population. In Zanzibar, 529,687 students (92,098 pre-primary, 313,096 primary and 124,493 secondary level) who were in compulsory basic education were at home for three months. Also, all universities and colleges temporarily stopped their scheduled operations for such a period of time. Furthermore, Tanzania and Zanzibar banned community and public events and gatherings, postponed scheduled sports and games, restricted assemblies and other large congregations and closed all education institutions from pre-primary to tertiary levels for the period of three months. However, the situation in 2022 came to normal schedule due to the decrease in magnitude of the pandemic effects (RGoZ, 2020) ^[25].

Consultations suggest that the short-term effects of COVID-19 on the Zanzibar tourism industry have had indirect and transitory effects on tourism education and training systems. Like other education and training systems, tourism education and training colleges and schools were closed as a physical measure to protect people from the spread of COVID-19. This caused substantial pressure for postponement, delays, rescheduling and transformations amongst training and education institutions providing tourism related courses (Pinaz Tiwari *et al*, 2021) ^[21].

However, the COVID-19 pandemic and corresponding health measures led to a natural and systematic swift from traditional education to e-education and training systems. This transition from traditional classroom to e-education such as online mode of teaching and learning had been positively adapted, intensified and virtual classrooms became the new forms for teachers and students. There had been balanced creativity, innovation, digital knowledge, education and vocational skills as essential for students

along with the inclusion of subjects such as crisis management, business resilience and health and safety measures to be incorporated in the tourism education systems. The COVID-19 pandemic has intensified e-tourism education system as an alternative and practical phenomenon in form of online learning, teaching, and assessment date back with a rise in the internet and is widely adopted (Pinaz *et al.*, 2021) ^[21].

High Effects of COVID-19 on Foreign Exchange Earnings in the Tourism Sector

The foreign exchange earnings from tourism are the major revenue sources for Zanzibar. The foreign exchange earnings are the revenues generated by inbound foreign tourists, and decrease in foreign tourists' number leads to reduced foreign exchange earnings. In African countries, the tourism sector earns more than 10% of the foreign exchange and the share of tourism in each country's national wealth is more than 40%. The tourism sector also contributes to increase in foreign exchange earnings at about more than 20% of total employment in Seychelles, Cape Verde, São Tomé and Príncipe, and Mauritius. Under the average scenario, the tourism and travel sector in Africa could lose at least US\$50 billion due to the COVID-19 pandemic and at least 2 million direct and indirect jobs (African Union, 2020) ^[1].

Table 2 summarizes perceived views of the consulted stakeholders on the effects of COVID-19 on foreign exchange earnings in the tourism sector and industry in Zanzibar. Table 2 suggests that majority of the consulted stakeholders, that is, about 75.4% had the views that foreign exchange earnings in the tourism sector have highly been negatively affected by COVID-19 due to decrease in the arrival of tourists from other parts of the world and closure of various tourism related business. The entire world has been affected by COVID-19, including Zanzibar following the border closures, cancellations of international flights and series of lockdowns, the tourist arrival rate in other countries has highly affected the foreign exchange earnings for Zanzibar due to limited rate/number of foreign currency brought into the economic cycle during the period of the pandemic (RGoZ, 2020) ^[25].

First and more importantly, failure to generate optimal foreign exchange earnings during the COVID-19 pandemic was likely the hardest bite due to ^[1] inability to control foreign exchange earnings, with notable monetary leakages of the tourist income through import of goods and services not readily available in destination, ^[2] ineffectiveness and inefficiency in foreign exchange earnings and retention systems and ^[3] encouragement of inclusive package tours that hurt minimize economic linkages and have no benefits to the Zanzibar community.

Secondly, the pandemic has not only affected the foreign exchange earnings (FEE) but also it has affected various regional developments, income generation and job opportunities thereby disrupting the local communities as a whole (Wang *et al.*, 2020) ^[38].

In the 2019 fiscal year (FY), the total value of foreign exchange earnings generated from tourism amounted to USD 2.557 billion. This represented 25.79% of all goods and service exports and 61.4% of service exports. The sector is more important for Zanzibar as it accounts for about a third of its GDP, 80% of its revenue, and remains the biggest employer in the island. Furthermore, on other SIDS

such as Seychelles, revenues tourism fell by 61% last year because of the effects of the COVID-19 pandemic, which cut tourist arrivals by 70%. Seychelles' economy relies heavily on tourism, which was hard hit in 2020 as COVID-19 led to travel restrictions worldwide to contain its spread (Reuters, 2021) ^[26]. Since tourism is a major source of revenue and employment in many small open economies, as it is among the key generators of employment, income, tax collections and foreign exchange earnings, the fall in foreign tourists' arrival rate by 68% from February to March 2020 resulted in fall in Foreign Exchange Earnings (FEE) by 66.32% which significantly impacted the Zanzibar economy (Statista, 2020) ^[30].

Insignificant negative effects of COVID-19 on the tourism environment

Tourism can also provide compelling incentives for individuals, governments and organizations to institute environmental policies, laws, regulations and conservation measures. This includes the creation of national parks, nature reserves, and other protected areas to preserve their biodiversity and correspondingly boost their tourism appeal. More than any other field of activity, tourism in Zanzibar is a complex function of the environment. Consequently, the environmental issues, among which destruction of biodiversity, pollution, global warming, waste increase and natural resources depletion affect tourism as much as other global issues, like the economic crisis or terrorism.

Table 2 presents the perceived views of the consulted stakeholders on the level of effects of COVID-19 on the environment in the tourism sector in Zanzibar. The table shows that very few, that is, 15.2% of the consulted tourism stakeholders had views that environment have been highly affected by COVID-19 pandemic. However, the majority, that is, 72.8% of the consulted tourism stakeholders had views that environment have been moderately affected by COVID-19 in Zanzibar. According to Muhammad *et al.* (2020) ^[23], COVID-19 was a "*Blessing in Disguise*" for the environment as it caused the environment to be polluted less. The COVID-19 pandemic has resulted in restrictions and limitations on movement and travel, covering both domestic and international tourism in all SIDS countries. Therefore, having these restrictions imposed on tourist activities also caused positive environmental effect (Semboja, 2022) ^[29].

Solid waste and littering have been increasing and notable environmental concerns in the Zanzibar coastal areas. In the east cost areas with high concentration of tourist activities and appealing natural attractions, waste disposal is a serious problem and improper disposal can be a major despoiler of the natural environment - ocean, scenic areas, and roadsides. Solid waste and littering can degrade the physical appearance of the water and shoreline and cause the death of marine animals. The high per capita generation of solid waste, along with the inappropriate disposal of the waste product is a problem across all sectors of the Zanzibar's economy.

It is estimated that about 60% of all solid waste produced in Zanzibar is not properly collected and sorted, leading to the accumulation of untreated and potentially toxic substances at unauthorized landfills and dumpsites (RGoZ, 2013) ^[40]. In this regard, tourism-oriented establishments, such as hotels and restaurants, contribute disproportionately to waste production, representing roughly 80% of all waste generated

in Zanzibar. Given the high resource requirements of the tourism sector and the rapid turnover of guests, hotels consume a large number of disposable appliances, such as plastic bottles, food and kitchen materials, tissue paper and laundry products. Without sustainable practices, the resulting rubbish and sewage produced could harm both the terrestrial and marine ecosystems.

Anchoring and other marine activities are increasing environmental tourism activities in Zanzibar. In marine tourism areas (around coastal waters, reefs, beach and shoreline and offshore waters) some tourist activities occur in or around fragile ecosystems. Anchoring, snorkeling, sport fishing and scuba diving, yachting, and cruising are some of the tourist activities that can cause direct degradation of marine ecosystems such as coral reefs, and subsequent impacts on coastal protection and fisheries.

High effects of COVID-19 on the Culture and Traditions in the Tourism Sector

The United Nations World Tourism Organization (UNWTO, 2018) ^[35] defines cultural tourism as 'a type of tourism activity in which the visitor's essential motivation is to learn, discover, experience and consume the tangible and intangible cultural attractions/products in a tourism destination.' As the cultural tourism phenomenon accelerated in the 1990s, distinct sub-sectors emerged, including heritage tourism, arts tourism, gastronomic tourism, film tourism and creative tourism (OECD, 2021) ^[19]. Tourism has been used to conserve the uniqueness of the Island's heritage, its history, culture and way of life. The culture and historic attributes of Zanzibar especially Stone Town has been dominating as the marketing message, more so than traditional sun and sand beach tourism.

Table 2 suggests that many, that is, about 63.9% of the consulted tourism stakeholders had the view that the effects of COVID-19 on the culture and traditions as well as attractions respectively in the tourism sector are high. Consultations with key informants and stakeholders suggest that the COVID-19 pandemic placed high pressure on the physical culture and tradition conservation as well as on the social fabric of communities, particularly for indigenous people and ethnic groups in Zanzibar. The museums and cultural event organizers are facing huge financial losses, as facilities shut down, and events had been cancelled. However, Zanzibar International film festivals and gatherings like Maulid and Eid celebrations were not halted or postponed in Zanzibar, but with the closure of markets for handicrafts, products and other goods, indigenous women's investments were particularly impacted.

The Zanzibar cultural tourism is the venue-based tourism sector. The venue-based sectors (such as museums, performing arts, live music, festivals, cinemas, etc.) were the hardest hit by social distancing measures, lockdowns and other measures. The abrupt drop in venue-based cultural tourism activities and thus their revenues puts their financial sustainability at risk and has resulted in reduced revenue earnings and lay-offs with repercussions for the value chain of their suppliers, from creative and non-creative sectors alike. Some cultural and creative sectors, such as online content platforms profited from the increased demand for cultural content streaming during lockdown but the benefits from this extra demand largely accrued in large firms in the industry (OECD, 2021) ^[19].

Zanzibar has sought to tap her cultural tourism's potential,

particularly around community-based indigenous arts and culture. However, COVID-19 significantly curtailed both tourism and arts and culture, with restrictions upon travel and movement, out-of-home activities, and large gatherings. RGoZ has been encouraging public participation programmes in cultural awareness, including public institutions, private individuals, non-governmental organizations and businesses. Cultural and creative sectors are largely composed of local, regional and international micro-private sector firms, non-profit organisations and creative professionals, often operating on the margins of financial sustainability (OECD, 2021) ^[19]. Large public and private cultural institutions and businesses have been depending on this dynamic cultural ecosystem for the provision of creative goods and services.

One of the effects of COVID-19 on the Culture and Traditions in the Tourism Sector is a switch from *venue based cultural tourism* to *e-cultural tourism* in Zanzibar. Some cultural and creative sectors, such as online content platforms, are now in the making and transformation. These will have positive global effect and profited from the increased demand for cultural content streaming during lockdown, but the benefits from this extra demand have largely accrued to the large scale foreign firms in the tourism industry.

Massive e-cultural tourism in Zanzibar coupled with emerging technologies, such as virtual and augmented realities, can create new forms of cultural experience, dissemination and new business models with market potential. With the lockdown, many public and private providers moved content on-line for free to keep audiences engaged and satisfy the then sharply increased demand for cultural content (OECD, 2021) ^[19]. While the provision of free and digitally mediated cultural content is not sustainable over time, it has opened the door to many future innovations.

High Effects of COVID-19 on the Tourism Accommodation Sector

Tourist accommodation means any facility consisting of two or more rooms or dwelling units providing lodging and other accommodations to the general public, such as tourist courts, tourist cottages, apartments, tourist homes, trailer parks, trailer courts, motels, motor hotels, hotels, bed & breakfasts, holiday parks and campgrounds. Quality accommodation is clearly a major element of the tourist's attraction and experience in Zanzibar. Some of the best tourist accommodation hotels are located in the Zanzibar North-east Coast, Prison Island - Changuu Private Island, Nungwi Beach, Forodhani Gardens and Kisauni Airport. The Zanzibar North-east Coast is the island's prime location where most of Zanzibar's top-end accommodation is set on the north-east beaches. The diving is excellent here. There is not much tidal variation and the archipelago's best reefs of Mnemba Island lie about a kilometer or half a mile offshore. Table 2 summarizes the opinions of the consulted tourism stakeholders on the effects of COVID-19 on the accommodation industry and the tourism sector in Zanzibar. The impact of COVID-19 on the tourism sector in SIDCs states, including the introduction of blanket travel restrictions, had had a devastating effect throughout the tourism value chain. Table 2 reveals that many, that is, about 74.3% of the consulted stakeholders, had the opinion that the hotel accommodation had highly been negatively

affected by the COVID-19 pandemic. Travel restrictions imposed by governments are the reasons for limited occupancy and low performance of accommodation/hospitality businesses and other parts of the tourism dependent economy as it facilitated reductions in both domestic and international travel (RGoZ, 2020) [25].

Globally, accommodation, entertainment and food services have been the most affected activities, with a loss of 33% and 17% working hours respectively in the second and third quarters of the year (ILO, 2021). COVID-19 led to massive booking cancellations and recorded low bookings with adverse effects on annual accommodation bookings for 2020 globally. This, in turn, resulted in hotel closures and empty rooms for Air Bed and Breakfast properties (Nhamo *et al.*, 2020) [16]. Hotel occupancy rates are estimated to have reached 21.9% in 2020, which is lower than the estimated 23.5% occupancy rate indicated. Consequently, overall hotel demand is estimated to have declined by 74.6% in 2020 and is reflected by the closure of close to 60 hotels across the country (Deloitte, 2021) [6].

One of the most immediate effects of low occupancy tourist accommodation has been reflected in the interrupted hotel services, and low cash flows, which sudden temporary business closures have prompted following lockdown regulations and social distancing protocols. Hotel operators faced temporary operational financial challenges of managing both operational and fixed costs while losing business. Albeit temporary but uncertain, such lockdown closures have threatened the longevity of new tourist hotels. Moreover, given that the tourism sector has high fixed costs, hotel owners and operators were concerned about managing long term investment costs when the enterprises continue to lose business.

Many tourist hotels feared their accommodation capacities in servicing their operational expenses, tax obligations, debts and many were struggling to cover fixed costs during 2020 and 2021. What is also likely to be exemplified soon is the reduced international consumer demand for accommodation products due to COVID-19 related health and hygiene precautions. Some international tourist hotels have had to decrease their operational capacities to conform to social distancing rules, which further reduced the long-term profitability and viability of such establishments. The global travel restrictions led to dramatic decline in the occupancy rates of many high class tourist hotels.

The COVID-19 pandemic threw businesses into disarray in many Seychelles, Comoro, Mauritius and other SIDS nations and had been expected to have drastic negative operational impacts upon the regional and global tourism industries. In response to the pandemic, hotels adopted numerous management strategies to ensure there was some degree of business continuity. Some hotels adopted a mixture of strategies which aimed to cope with specific COVID-19 pandemic – improving hygiene and health standards – and secondary crisis – cost control and financial planning and to promote recovery – by mostly local and long-stay markets. It is expected that numerous hotels would close because of pandemic, whilst larger chains would be able to consolidate their position by continuing to open new properties and buying small hotels. Improvements in operations and efficiency were expected, although some more drastic changes – such as the end of in-person events – were more debated.

The private sector firms utilized self-save strategies to

revitalize their cash flow, reduce their non-essential costs, enhance their operating capabilities, and make dynamic modifications promptly based on the fluctuating pandemic situation. Moreover, the private sector focused on building trust in tourists, reinforcing and their brands, redirecting their promotional packages, and being more innovative by adapting their operations to the so-called 'new normal.'

Low effects of COVID-19 on the infrastructure of the tourism sector

Tourism infrastructure is a broad category which includes accommodation, office buildings, event venues, parks facilities, dining and entertainment precincts, cultural and arts amenities, transport networks and interchanges, aviation, maritime and roads infrastructure and more (IFC, 2020) [8]. However, basic public and private tourism infrastructure systems benefit more than visitors with improved amenity, greater economic, mobility and employment opportunities for local residents.

Table 2 presents perceived views of the stakeholders on the effects of COVID-19 on the infrastructure of the tourism sector in Zanzibar. The table reveals that the very few, that is, about 9.9% of the consulted tourism stakeholders had the opinion that the effects of COVID-19 on the tourism infrastructures in Zanzibar were high. About 52.4% of the consulted tourism stakeholders had the opinion that there have been low effects of COVID-19 on the tourism infrastructures in Zanzibar. However, they were significantly lower usage rates in physical infrastructure during the pandemic; the resulting shortfall in financing and maintenance have gotten the attention of private and public sectors, which have been focusing on allocating financial resources to the immediate needs of health care systems during 2020/2021 and 2021/2022.

Due to the direct impact of COVID-19, as well as confinement measures, disruptions occurred in all socio-economic sectors in Zanzibar were linked to a number of reasons. These, included disruptions in supply chains, availability of workers for infrastructure projects (airport and seaport construction) and operations, delays and cancellations, demand shocks, as well as interruptions to investment processes and procurement. Both private and public tourism infrastructure systems and facilities are capital intensive systems, fixed and they do not change in the short term run terms. The public tourism infrastructure relies on well-established single-source supply chains (e.g., airways) may consider back-up or secondary sources of supplies (e.g. maritime transport), where possible, in the event of short-time interruptions (IFC, 2020) [8].

It is important to recognize that the tourism infrastructure can be broken into two core groups: demand drivers and supporting visitor infrastructure. Demand drivers create and encourage visitation to a tourism destination. Critically, they can extend the length of stay and increase visitor expenditure. Demand drivers are vital to ensure visitor dispersal to regional areas, spreading the economic benefits of tourism to communities outside capital cities and gateways. Demand drivers such as 'must-see' icons – like the Old Stone Town host activities that encourage travel. Demand drivers include convention and exhibition centres, stadia, and visitor attractions such as national parks, museums, art galleries, zoos and aquariums. Demand drivers are usually public infrastructure, requiring ongoing public investments by government.

As an island nation, Zanzibar is highly reliant on aviation for international visitation. Zanzibar is also dependent on aviation for Unguja-Pemba domestic routes and business travel. Capacity constraints at Unguja and Pemba airports inhibit growth in passenger movements, and inevitably the country's ability to achieve the Blue Economy potential target of growing overnight visitor expenditure to \$140 billion by 2020. Furthermore, it is connectivity to and from Zanzibar major airports affects visitor experience and perceptions of the destination.

Zanzibar International Airport needed to quickly respond to plummeting demand for air travel, while at the same time remaining open to provide a minimum level of service. Besides, lots revenues from reduced take offs and landings, non-aeronautical revenues from parking facilities, restaurants, and shops have also declined significantly. As a result, airport operators are reducing earnings expectations and credit agencies downgraded the long-term debt ratings of several and/or revised their outlooks to negative (IFC, 2020) ^[8]. While airports had high fixed costs, they had to respond by reducing variable costs where possible by scaling back capacities, (by closing certain sea-ferries, for example), furloughing staff, and postponing CAPEX (IFC, 2020) ^[8].

Low effects of COVID-19 on the Domestic Tourism in Zanzibar

The concept of domestic tourism is used to refer to all internal tourism activities that are undertaken by people in their own country of permanent residence (Acha, 2020) ^[1]. From a geographical viewpoint, domestic tourism may range from local excursion, regional trips to national level travels. On the basis of the purpose of tour or the motives of tourists, it is of three types, *viz.*, (a) common interest tourism, (b) holiday tourism and (c) business tourism. Compared to international tourists, domestic tourists are more knowledgeable about the destination, its culture and custom, its language and food, and other general features, so they are more demanding for the quality of goods and services.

Table 2 presents the perceived views of consulted the tourism sector stakeholders on the effect of COVID-19 on the domestic tourism in Zanzibar. Table 2 suggests that very few, that is, about 18.3% of the consulted tourism stakeholders had views that there were high effects of COVID-19 on the domestic tourism sector. Many, that is, 69.7% of the consulted tourism stakeholders had the views that there were low effects of COVID-19 on the domestic tourism sector.

Consultations with various stakeholders suggest that there are minimal domestic tourism activities in Zanzibar and not much prospect of a significant increase any time soon. Minimal domestic tourism has been attributed due to internal factors such as lack of tourism knowledge and awareness, low domestic incomes and relative high tourist prices. Also, domestic tourism has been limited to visiting friends and relatives; this will expand to leisure tourism soon.

The domestic tourism helped to soften the blow suffered from the collapse in international tourism in many developed nations and regions. This market segment though not comparable to international tourism was and continues to be promising in cushioning the tourism sector amidst shocks of this nature. Increasing marketing for domestic

tourism could provide the quick gains needed to keep the tourism sector afloat, as domestic tourism is more likely to quickly rebound than international tourism (OECD, 2020b) ^[19]. This effort can also circumvent the seasonal nature of tourism: international tourism could be promoted in the high season and with more domestic-focused and price-sensitive options offered in the low season.

During the COVID-19 pandemic, some SIDC countries implemented several measures targeted at promoting regional and domestic travel and restoring confidence in the tourism sector. These included financial incentives, marketing and promotion, product development, partnerships, market intelligence, and capacity building and training. To encourage domestic tourism in Tanzania and Zanzibar, a series of initiatives targeting incentives to boost domestic tourism were designed and implemented through special offers of hotel discounts to permanent residents, provision of affordable prices for tourist accommodation, and subsidizing 25% of the cost of accommodation; lower VAT rate on accommodation, culture, sports; online campaigns; corporate or business holiday travel vouchers; subsidies for citizens through the social tourism programme "Tourism for All", addressed to low-income groups; Tourist Card, free use loan with zero interest rates; and introducing a system of holiday vouchers for medical people in holiday initiative (holiday vouchers for public employees similar to the meal tickets).

Significant effects of COVID-19 on Tourism Seasonality Status

Tourism seasonality is considered as part of tourism business cycles due to market demand variations on a regular time horizon and in regular frequencies as a result of climate, economic and institutional characteristics as well as other global factors, such as general business cycles, travel costs, political and socio-demographic characteristics. The tourism sector in Zanzibar is characterized by two seasons, namely high season and low season. The best time and high season to visit Zanzibar is during the archipelago's dry season, from July to September, which is a very popular time to travel. However, it is worthwhile travelling at most times of the year, with balmy temperatures between 28°C and 34°C and sunshine the norm.

Table 2 presents the perceived views of consulted stakeholders on the effects of the COVID-19 pandemic on the status of tourism seasonality in Zanzibar. Table 2 suggests that 60.7% of consulted stakeholders suggest were highly affected by COVID-19 in Zanzibar. The COVID-19 pandemic has disturbed and altered the seasonality of the Zanzibar tourism sector, and had negative impact on the tourist seasons that are most important for value chain actors. It is factual that the tendency to visit (or merely intend to visit) also changed slightly between the summer seasons of 2019, 2020 and 2021. This was evident in the patterns and structures of the number of people visited each of the places during the summer of 2020, compared to 2019 (da Silva *et al.*, 2021) ^[5].

The universal cause of seasonality in general is the movement of the earth around the sun. This can be magnified or diminished by the inclination of the earth towards the sun, and for specific places, the location, particularly the latitude, of a particular place on the earth. Then, seasonality causes the fluctuation in the number of tourists and visitors to a particular destination. Some

destinations, at certain times, have more tourists and visitors than they are able to accommodate, while at other times, there are very few tourists and visitors to the same region. The effects of seasonality are felt by the majority of hoteliers. Declining revenues, low occupancy rates, seasonal drops can disrupt the sustainability of an establishment if they are not anticipated by the hotelier.

Seasonal over-tourism has long been recognized as one of the overriding issues hindering sustainable development of the tourism industry worldwide. Sustainability consists of economic growth, social inclusion, and environmental protection, which are all affected by tourism seasonality. At the hotel level, seasonal fluctuations in tourism demand tend to hurt operational and financial performances and then reduce hotels' competitive advantage and efficiency. An extreme variance of occupancy rates in a tourist destination increases the exit risk and the likelihood of business failure for hotels in that destination.

Many tourist destination countries aim at reducing tourism seasonality. Zanzibar has adopted various strategies. These include relying on traditional marketing tools, such as familiarization trips; assistance to travel writers and journalists; participation in trade fairs; and use of advanced marketing tools, such as websites, the Internet and e-mailing. Other approaches include selection or development of the types of tourist attractions that will attract visitors at different times of the year, and especially during the typical low season such as festivals and special events, conferences and special types of recreation facilities and activities. Zanzibar targets special market segments as older tourists who are free to travel any time, and prefer the less congested destination environments that are available during the low season and put more effort on encouraging domestic tourism that uses international facilities during the low season.

Low effects of COVID-19 on tourist image status on the tourism sector

The tourist images are impressions, feelings, responses and reflections portrayed by the tourists towards specific destination country or tourism area/site (Nadeau, *et al*, 2021) ^[15]. A choice of tourist destination is usually not made objectively but subjectively according to the image projected, hence to create the attractiveness of the images projected and the impact on the market concerned. Table 2 presents the perceived views of the consulted stakeholders on the effects of COVID-19 on tourist image of the tourism sector and industry in Zanzibar. Table 2 suggests that the majority, that is, about 73.4 % of the consulted tourism stakeholders, pointed out that there were no or low effects of the COVID-19 on the tourist image status in Zanzibar.

The short and immediate negative effects of the COVID-19 pandemic on the tourist image status were well captured in social media postings and circulations (Nadeau, *et al*, 2021) ^[15]. The anticipated negativity associated with the pandemic's media coverage stimulated short term negative image about the tourism destinations. The COVID-19 pandemic received extensive short term media coverage, which would potentially have affected the tourism destination image in the short term (Gössling *et al.*, 2021) ^[8]. However, these negative effects of the COVID-19 did not have significant negative effects on the permanent Zanzibar tourism destination images. The tourist images are complex functions of existing and developments of socio-

cultural relationships, information, and knowledge and communication systems. These take time to be created and take time to be destroyed.

The long term and permanent Zanzibar tourism image on the global, regional and national media framing played a significant role in influencing short-term travel intentions and thus caused potential visitors to be influenced on intra-pandemic media coverage (Gössling *et al.*, 2020) ^[7]. In effect, a large proportion of media coverage surrounding COVID-19 did not negatively affect the Zanzibar's destination image and potential visitors' travel intentions due to various reasons. These included limited or restricted flow of data and information from the public and private sectors about the loss of life, health conditions, socio-economic activities and flows of incomes in Zanzibar during the COVID-19 pandemic period 2020 - 2021. As the primary source of information during a crisis, the social media greatly affects potential travelers' destination awareness. The non-negative image of the country due to the infection rates had non-negative impact on travel and tourism in Zanzibar (Moreno-Luna, *et al.* 2021) ^[22].

It is particularly important for non-visitors because they usually have limited destination familiarity and entirely rely on the media, other individuals or the Internet, (Tan and Wu, 2016) ^[33]. In contrast, past experience or familiarity with a destination directly influences the image an individual has of a destination and can affect his/her choice of destination. The constructs of the country images and destination images in many SIDs nations have been useful in predicting tourists' travel intentions and interactions (Nadeau, *et al*, 2021) ^[15]. Various tourism stakeholders have been emphasizing creating intentions towards portraying the tourist image of Zanzibar which is original, safe and attractive. This has been achieved by making the best use of the particular media, resources and peculiarities of the region or site, providing opportunities for contact with local people, their crafts and custom, introducing specific features to create the "atmosphere" and identity, and upgrading the quality of standards of the tourist products in special and related services and facilities in general.

High Effects of COVID-19 on Tourism Sector Safety and Security

Safety is defined as "the condition of being protected from the likely event that can cause danger, risk, or injury," whereas security is defined as "the state of being free from danger or threat." According to Progress Report to the UNWTO Committee on Tourism and Competitiveness (UNWTO, 2018), safety is the set of precautions put in place to prevent tourists and industry workers from being exposed to situations where they believe that they are in personal danger, due to crime, accidents, and emergencies. Security is a set of precautions put in place against hostile acts that seek to inflict a large scale of damage resulting in maximum economic disruption or measures taken to guard against espionage or sabotage, crime, attack or escape.

Table 2 suggests that majority of the respondents, that is, about 81.6% responded that safety and security of the tourism sector were highly affected by the COVID-19 pandemic in Zanzibar. That is, the COVID-19 pandemic in Zanzibar hugely disrupted the national security especially non-traditional security. The outbreak of the pandemic represented a diversified emergency by all socio-economic sectors and by human units. It had first and foremost

medical and health security impacts and, secondly, economic, social and psychological security impacts. Also, the public safety and security preventive measures adopted by SMZ Government to stem the contagion (lockdown, travel limitation, etc.) had direct consequences on the national security; tourism market, economic productivity, the growth and education of the younger generations and finally the mental health of individuals.

The national security can be categorized into traditional and non-traditional security. The traditional security or security threats are described through the country's survival prism and anticipated predominantly in the case of inter-state military clash. In recent years, non-traditional security issue is considered to be connected with issues involving environmental degradation and climate change, infectious disease, terrorism, transnational crimes, and illegal migration. For example, infectious diseases such as COVID-19, not only threaten the existence of the health and state security directly, but they challenge the human and institutional capacities of the state to safeguard its people.

Overall, the non-traditional security aspects of Zanzibar such as health, supply chain management and social relations had been suffering from the COVID-19 pandemic. The non-traditional safety and security represent many things, including a stable income, consistent accommodation, water, clothing, and food supplies as part of the predictability of daily life, protection from crime, and psychological security.

Health security functions to maintain the minimum level of protection from diseases and ensure the safety of all citizens and tourists. However, there were debates among stakeholders about the concept of health security and what it meant for public health. Both preventive and remedial measures were required to mitigate the risk of public health dangers that pose colossal threats to individuals domestically or globally. The COVID-19 pandemic exposed the lack of capacity and performance to ensure there is public health security. Indeed, many SIDS countries struggled in their ability to deter, identify and respond to the epidemic.

A sharp drop in both local and foreign tourists was unavoidable. As a result, many workers lost their jobs in the tourism sector and potentially needed to find new ways of making money. This happened due to collapse in the tourism businesses for micro, small and medium-sized enterprises (MSMEs). MSMEs provide most of the employment opportunities and particularly for Indonesia these are the basic economic pillars of the country. New and effective ways need to be found for MSMEs to cope with the aftermath of the COVID-19 pandemic and in particular their access to working capital and finance, adjust their marketing practices to boost demand for their products, otherwise social protection, social dialogue, and social cohesion will be at great risk (Semboja, 2022) ^[29].

Social cohesion indicates that human beings interact with each other in a society to build a fellows' safety and security feelings among members of the society. This foundational principle of society has been tremendously hampered due to the COVID-19 pandemic. It was known that if one person who was positively infected by the coronavirus could shake hands with another person would most likely infect more than just one person. Worryingly, it is difficult to say how many people were infected due to social relationships (hand-shake). Therefore, the "Lock down" solution was one

of the best solutions for breaking the chain of transmission. As a result, this meant stopping schools, offices, tourism industries, and so on. In other words, all public and private sector workplaces were no longer operating or only minimally did so in Zanzibar.

The consulted stakeholders had the views that COVID-19 threatened the health security of the people, their personal properties and hotel property; indirectly affect the amount of financial profits and losses. Financial threats caused direct financial losses to both the tourist hotels and customers. The issues of financial safety and security are also important to the image of a tourist destination and for visitor satisfaction.

The Conclusion

Main Findings

The study suggests that half of consulted stakeholders, that is, about 50.45% had the view that the COVID-19 had great effects on the performances of tourism sector activities and areas. Another half had mixed feelings on the effects of the COVID-19 pandemic. A quarter that is about 25.0% considered that COVID-19 had moderate effects and another quarter, which is 24.58%, thought that COVID-19 had less effects on the performances of the Zanzibar tourism sector activities and areas.

The safety and security (81.6%), foreign exchange earnings (75.4%), the accommodation sector (74.3%), and income/revenues (73.9%) were perceived as mostly negatively affected tourism industry and sector areas in Zanzibar. The study found that effects of COVID-19 pandemic were less and insignificant in some few tourism activities and areas such as the infrastructure of the tourism sector (9.9%), the environment in the tourism sector (15.2%) and the domestic tourism (18.3%).

Policy Recommendations

As part of recovery and sustainable tourism development; Zanzibar targets to be one of the top tourism destinations of the Indian Ocean, offering an up market and high quality product across the board. Zanzibar has to build an integrated, inclusive and sustainable tourism sector as a reliable economic industry and a market for other sectors by promoting high-value tourism, creating decent jobs for the locals and ensuring that most tourist dollars spent stay in Zanzibar (RGoZ, 2020) ^[25]. The recommended tourism recovery policy objectives aim at controlling and improving safety and security, optimal foreign exchange earnings systems; modern tourism accommodation systems, and efficient income/revenue flows from tourism sector and industry.

First and foremost, it is vital that Zanzibar should control and maintain safety and security systems in the tourism sector and industry in the country. This target must be attained through effective monitoring, evaluating and reviewing the global and national safety and security systems for the tourism sector. Zanzibar has to exercise close collaboration between the public and the private sector as a combined strategy, health authorities and the tourism sector, to appropriately face COVID-19 effects on the security and safety in tourism sector.

Secondly, Zanzibar ought to optimize foreign exchange earnings and retention systems in the tourism sector. This can be achieved by intensifying monitoring, evaluation and controlling systems so as to make the country continue to benefit from foreign exchange earnings sources; ensuring

the effective operation of the established tourism institutions/organisations in all the tourism subsectors to ensure effective and legal operations of the sector; strengthening policy, legal and regulations that support a win-win situation between the government and the tourists; increasing effectiveness and efficiency in foreign exchange earning collection and discouraging inclusive foreign managed package tours that hurt national economy and have no benefits to Zanzibar communities.

Thirdly, the government has to promote and support investments and development of quality tourism accommodation systems, infrastructure and activities. This can be done by encouraging eco-lodge development designed to attract and serve a broader eco-tourism market; encouraging investors who are interested in long-term profitability with a sense of responsibility to the local community; enforcing and monitoring building standards to protect the natural and aesthetic environment. The materials must reflect the Zanzibar tourism image, site capabilities and the environmental and social context of the setting and ensuring that the institution responsible for environment should maintain the right to specify activities that limit negative impact associated with construction and operations. Fourthly, Zanzibar has to ensure there are efficient national income generating, mobilization, savings and utilization systems in the tourism sector. There are different many types of incomes generated, distributed and earned in the tourism sector value chains. These include individuals, businesses, institution and general incomes. Individuals generally consider their gross incomes to equal the total of their earnings in the form of wages and salaries, the return on their investments and sales of property, and other receipts. Their net income is composed of their gross income reduced by the costs incurred in producing the income.

Similarly, tourism firms and other businesses generally treat their total receipts from tourism services, products, and any interest and dividends received with respect to their cash accounts and reserves related to the tourism sector business as their gross income. Businesses' net incomes—i.e., profits are determined by reducing their gross income by their business expenses. The government earns taxes, levies, duties and other revenues.

The paper recommends the Government to plan, own, manage and promote the tourism industry system that emphasizes sustainability, quality and diversification, and which is culturally responsible, socially desirable, ecologically friendly, environmentally sustainable and economically viable. The Zanzibar tourism as a vital socio-economic development factor can participate effectively in empowering the people of Zanzibar to successfully own, manage and operate their social welfare and thus demanding simultaneously development of sustainable tourism industry systems, activities and areas.

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