

Challenges of Tour Operators

Case: Dar-es-Salaam, Tanzania

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<p>The title of your thesis Challenges of tour operators Case study: Dar-es-Salaam, Tanzania</p>	<p>Number of pages and appendices 52 + 3</p>
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<p>This research is commissioned by Development research organization (DROrg). This is a non-governmental organization based in Dar-es-Salaam, Tanzania which is dealing with conducting various scientific researches with an emphasis on promoting economic development in the country. The aim of this research is to study the challenges of tour operators and suggesting the appropriate measures to eradicate such challenges.</p> <p>Quantitative research method is the method which is applied in this thesis in the course of data analysis. The primary data was collected through the questionnaires distributed to the tour operating companies. The secondary data which was used to formulate the theoretical framework was gathered from the literatures related to tourism intermediaries and the internet sources as well.</p> <p>The results show that most of the challenges are originating from the external facilitators of the tourism but they have negative impacts in the internal business operations of tour operators. There are some obstacles towards the delivering of the services by the tour operators to the customers resulting from the improper functioning of other supporting factors such as poor infrastructure, safety etc. Thus, appropriate measures should be taken from the public and private sectors in joining forces to tackle the challenges.</p>	
<p>Key words Tour operators, Tourism promoters, Challenges, Tanzania, DRorg</p>	

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1. Introduction

The thesis topic was primarily introduced to the researcher by the commissioning institution called Development Research Organization (DROrg). The topic was then modified under the supervision of Dr Habiyakare, who was the representative from the educational institution called Haaga-Helia University of applied science. Later on, it was presented back to the commissioner to be approved so that other research processes can proceed.

DRorg is a non-governmental organization located in Dar-es- Salaam, Tanzania. The organization was established in 2004 and is working to promote the development in Tanzania by conducting intellectual researches and analysis on various fields such as natural resources and environment management, regional integration and corporate culture, social welfare and quality governance.

The organization was formed by a group of intellectuals who decided to address the demand of economic development in the country through the application of their academic knowledge in conducting researches. The studies performed in the organization are aimed at finding the causes for the slow pace of development and suggesting the possible measures to accelerate development in the country from various perspectives such as economic development and social wellbeing of the residents.

The organization saw the importance of conducting the research about the operations of the tour operators. There were many reasons being placed, to name a few are such as follows;

- Tourism is one of the main contributors of national revenues and the main generator of country's reserve of foreign currencies.
- Tanzania has been blessed with many tourist's attractions such as the third highest mountain in the world (Mt. Kilimanjaro, Ngorongoro crater, Serengeti national park largely known for its annual migration of the wild beasts to the neighbouring country which is Kenya)

Thus, DROrg could set up the research from different point of view but they approved the study to be conducted from the tour operator's angle since they are the main facilitators and point of

linkage between the customers and the products. By studying the challenges that the tour operators are facing in their daily operations and giving suggestions of possible opportunities in their business, it will have a positive impact in making their operations run smoother.

1.1 Research problem

The main problem to be discussed will be, “What are the challenges faced by the tour operators in Dar-es-Salaam”. After identifying the challenges of tour operators, the researcher will give suggestions on how to strengthen the company operations by citing the opportunity and minimizing possibility of occurrence of any threats in the future.

Conducting a study on the challenges of a certain phenomenon and giving analytical suggestions can be a huge task especially for an amateur researcher. For that reason, the researcher decided to divide the main research problem into 3 minor questions in order to assess the challenges from different perspectives and it is also a precaution measure of assistance in avoiding discussing matters which are irrelevant to the research problem.

The supporting research arguments which will guide the study in the course of finding the results about the main questions are such as follows:

- What are the core processes of the tour operators in Dar-es-Salaam?
- What are the obstacles towards the attaining the desired level of satisfaction in the daily activities of the operations?
- What should be done in the tourism industry so that the tour operators can have smooth company operations?

Hence, the research analysis will focus on the response from various employees working in different positions in their respective tour operating companies in Dar-es-Salaam. The views from the employees will be of high value since the research seeks to identify the challenges affecting all the aspects of company operations.

1.2 Research Aim and objectives

The main aim of this research is to study the current situation of the tour operating companies and suggest the possible measures to increase the efficiency and quality of the duties to be performed. This aim can be achieved by studying the core processes and the daily operations of the tour operating companies.

The research aim has some supporting objectives which involve an insight study on the small aspects of company operations which in a broader manner might assist the process of accurate analysis of the data so that the challenges will be conquered appropriately and the main aim of the research will be achieved. The following are the list of objectives of this research;

- To give an insight assessment of the core processes of the tour operators by studying the products and services offered by the companies
- To find out the hindrance points towards the development of the company by studying the aspects of business environment such as competition, government policies, etc.
- To identify the main customers and to find out if there is a need to focus on alternative niche markets
- To give solution to problems and recommendations to possible threats to the company operations on how to attain a considerable and desirable growth.

The tourism business industry in developing countries such as Tanzania is poised to have many challenges e.g. competition. In the course of development, Tanzania is putting forward some favourable policies to attract foreign investors.

The advantage of having foreign investors is that, usually most of them have high capital to invest in the business than most of the local entrepreneurs, meaning that the high capital invested might be directly proportional to the high quality of products and services offered by the companies. This can also reflect to the fact that the foreign investors might be able to attract highly skilled personnel to work for them by paying them mouth-watering salaries. This brings us to another objective of this research which is to study the competition and give the appropriate measures to reduce the negative effects in the company operations.

1.3 Significance of research and Limitation

The project coordinator of the DROrg pointed out that recently he has been in contact with tour operators who were seeking for the knowledge of trends in the tour operating industry in Dar-es-Salaam, most of whom were of foreign origin. Most of the companies with foreign origin are trying to penetrate into tourism market in Tanzania.

This analytical study of the challenges and suggestions on the measures to eradicate the obstacles towards the success of tour operators will be of great significance to the respective companies who have already established their business operations and to those companies which will be established in the future. Hence, tour operators will benefit from the findings of this study since the findings will put them in a better position to improve efficiency and eventually productivity in their daily business operations.

The research will be conducted only in one region which is Dar-es-Salaam. It will be of great significance to other researchers in the organization as the results will pave a way for future researches even in other regions such as Arusha in which most of the tourism natural attractions are located.

In most cases, many researches have limitations, whether they are originating from dealing with a small sample size or a large population sample. The main limitations in conduction this research were the limited time and limited funds. The research seeks to find out about the company operations in this case the main sample will be the company representatives only.

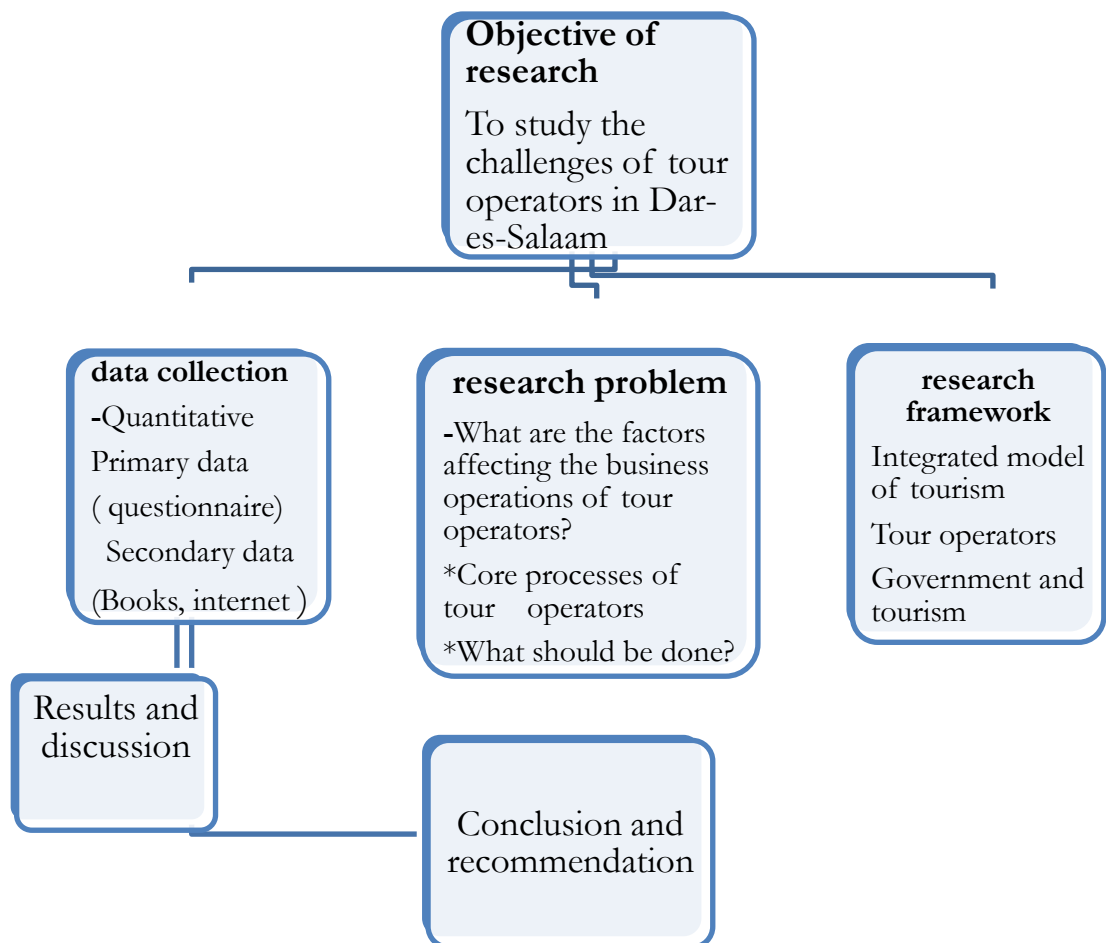
The time limitation was another obstacle due to the fact that the process of data collection was to be done during the months of June, July and August. This period in the tourism industry is considered to be high season in terms of the high number of tourists visiting a certain destination. For that reason most of the companies did not give full cooperation in responding to the questionnaires but instead they were focused on entertaining their customers.

The setback arising from the effects of limited funds were due to fact that the commissioner only offered a limited amount of support and other costs were covered by the researcher himself and in this case some plans had to be cancelled so that the costs could be within the limited budget of the researcher.

1.5 Thesis structure

The figure below shows the summary of the main thesis contents in a form of diagram.

Figure 1. Thesis structure



This thesis is divided into 5 chapters so that it can give the reader a clear view of the matters which were discussed. Each chapter has some contents linked up to each other and together they form the main chapter and provide an ease for the reader to follow the continuity of the research.

The first chapter is the introduction chapter; this is aimed at introducing the reader to the research topic and gives them a broader view of what is to be discussed in the thesis. The second

chapter is the literature review; this chapter will give the reader an insight overview of various theories concerning the research problem and objective such as the study on the core processes of the tour operators, the potential customers of their products and services etc.

The third chapter contains some detailed information about the approaches and methods used to perform the research, this chapter also involve some information such as the data collection and analysis processes. The degree of validity and reliability of the thesis process is also discussed in this chapter.

The fourth chapter brings about the discussion of the gathered and analysed data from the chosen sample in the population. Finally, the fifth and last chapter is about the conclusion and recommendations from the results which were found. The appropriate suggestions no how and what should be done by the tour operators to make their operations run more effectively will be found in this chapter.

2. Tourism industry

Tourism is the temporary movement of people to the destinations outside from their normal places of work and residence including the totality of the activities to be undertaken during their stay in those destinations, not only that but also including the facilities created so that the needs of the service receivers will be satisfied. (Cook, Roy & Marqua 2002, 5)

Tourism industry is an industry which consists of various service and product providers (luxury and business) working in a correlation manner to offer the products or services which are directly or indirectly influencing the functionality of the tourism industry.

The diagram below demonstrates the summary of the aspects involved in the tourism industry.

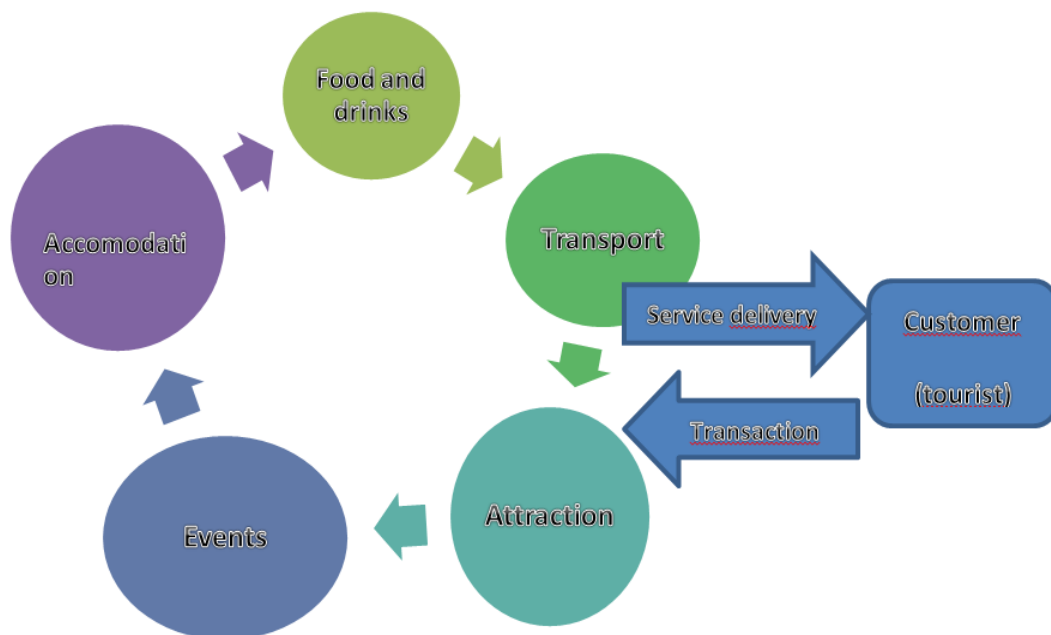


Figure 2. The tourism market. (Cooper 2008, 28)

2.1 An integrated model of tourism

There have been many contradictions in getting a proper definition of tourism. The following diagram will demonstrate how the activities of various services providers in the tourism industry are interacted with each other. Also the diagram will help to identify the internal and external factors affecting the core processes of the actors in the industry in a negative and positive way.

The diagram of the integrated activities in the tourism industry

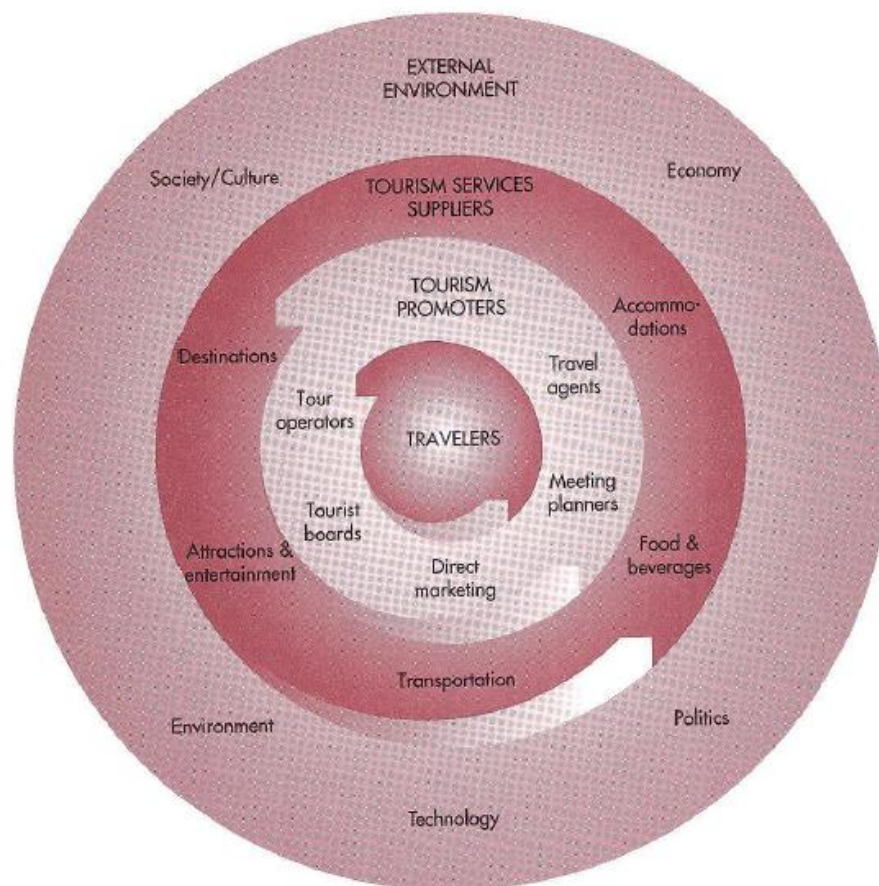


Figure 3: An integrated model of tourism. (Cook et al 2002, 7)

The diagram above describes the integrated model of tourism; the tourists (travellers) appear to be at the core (centre) of the diagram. In this model the travellers are being reviewed as the focal point of the whole process while other supporting aspects in the tourism industry follow from the other levels.

From the innermost circle, the group is encircled by tourism promoters who are dealing with supplying the tourism industry with professional services such as marketing of tourism products and services in the destination. Examples of tourism promoters are such as tour operators, tourism boards, travel agents, meeting planners, etc.

The tourism promoters are encircled by another group named the tourism services suppliers. This group is consisted of a variety of products and services offered in the tourism industry such as; Accommodation, food and beverages, transport, destinations, attractions and entertainment.

Tourism service suppliers may either supply the services individually or may team up with other suppliers to offer fully packed products. An example of individual service suppliers are such as railways, airlines, road services as they all offer transportation services. However, the interdependence in the tourism industry can be easily practiced through the creativity by the service providers in delivering the ready-made packages such as fly-ride or fly-cruise products.

The group located at the outermost circle, is regarded as the External environment. This includes the effects brought about by the practices in various aspects such as economy, politics, technology, environment, socio-cultural effects.

The external environments might have some effects which can be observed over a long period of time and other can have some immediate effects in the destination e.g. immediate effects of the external environments can be brought about by political instabilities in a way that the numbers of visiting tourist can fall dramatically while an example of long time effects can result from the effects of changes in socio-cultural behaviours as a result of increased inflows of tourists.

Tourism is the temporary movement of people to the destinations outside from their normal places of work and residence including the totality of the activities to be undertaken during their stay in those destinations, not only that but also including the facilities created so that the needs of the service receivers will be satisfied. (Cook et al 2002, 5)

2.2 Tourism intermediaries

Like many other industries, the tourism industry is comprised of product buyers and sellers. The tourism industry is also consisted of the main actors who are known as the “Intermediaries” due to the fact that they act as “buyers” by purchasing the products from the service provider’s e. g airlines and hotels. The intermediaries also act as “sellers” by selling the products to the final consumers. (Cooper 2012, 198)

Intermediaries like tour operators have a function of putting together two or more elements of the services from the original service providers and sell them to the final consumer. According to Fyall & Wanhill (2008), the roles played by the intermediaries are such as follows;

- Market creation by acting as a linkage point between the buyers and the sellers
- Risk transferring and carrying, the tour operators usually buy the services in a bulk amount and in that way they transfer and carry the risk of the products which might not be purchased.
- The tour operators create an ease in the product purchase by the consumers by acting as a hypermarket selling many tourism services.
- Tour operators are a cheaper source of product because intermediaries negotiate and buy many products at a lower price and in that way the selling price to the consumer will be lower than if the product was purchased in a smaller amount.
- Lastly, tour operators play an important role in helping the improvement of destination competitiveness because the tour operators usually operate in large networks.

2.3 Tour operators

The important function of a tour operating company is to bridge the elements of the services offered from the supply side of the business with the consumption side of the business. This role is being achieved due to the fact that the tourism industry is an industry offering the services which are interdependent (branches). Thus, the tour operator performs the task of linking such elements together and sells the products in one piece and in a single price. (Cooper 2012, 198)

The tour operators purchase the tourism elements such as airline tickets and hotel rooms in a large scale and combine them together, market them as a single product through brochures and other advertising media. The core product of the tour operators is the “All inclusive tour package”, this might be a combination of transport, accommodation and activities in the destination. The products assembled by the tour operators are then distributed to the travel agents across the world to be purchased at a competitive price. (Cooper 2012, 198-199)

2.4 Types of tour operators

The tour operators have been classified in many categories but the most common categorization is the one which is based on the scope of the company’s operations i. e domestic, out bond and inbound tour operators.

Table 1. Types of tour operators

Tour Operator	Description
Domestic	Characterized by small local market segmentation with limitations in terms of services offered and the duration of travel e. g coach holidays, city breaks and short holidays.
Outbound	Their main focus is on the international travels with an all well formatted tour package inclusive of flights, accommodation etc.
Inbound	They are small tour operators with a large destination expertise and they use it to get contracts from other large scale operators and control the activities in the destination such as attractions, events, accommodation etc. (Buhalis 2001)

The table above shows the types and descriptions of tour operators. (Cooper 2012, 199)

2.5 Successful destination

The concept which is denoted shortly as “5A’s” is an essential phenomenon towards developing a successful destination. There must an effective mix and balance in all the aspects of “5A” which are abbreviated as Accommodation, Accessibility, Activities, Amenities and Attractions. (IATA 2005, 15)

The diagram below illustrates the key elements of 5A theory

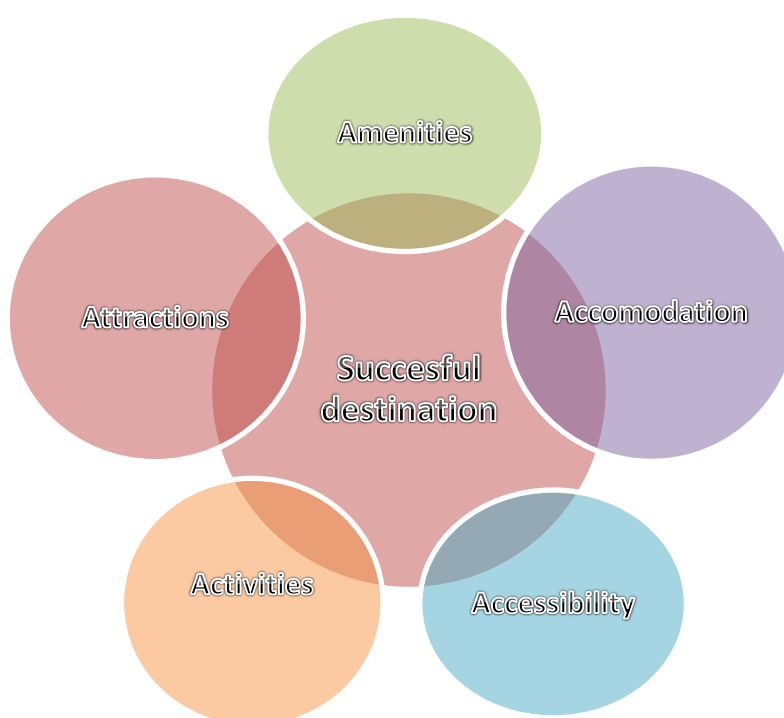


Figure 4. 5A Theory

The contents of 5A and their contribution in building a successful destination will be explained in the following paragraphs;

1. Accommodation

This refers to the shelters or places where the tourists will stay. Traditionally, tour operators used to offers accommodation services in the hotels and hostels. However, as a result changes in the trends in the tourism industry and the effects of increased

competition in the business, the tour operators were out to be more creative and so that they can remain competitive in their business. Thus, a result of product and service innovation and development led to the accommodation service being offered in the lodges, camp-vans, village temples such as in Thailand and staying at people's houses for example in UK and Ireland. (IATA 2005, 15)

2. Accessibility

Lack of an ease in accessibility of a destination is another setback towards the growth of tourism industry especially in the developing countries. Accessibility refers to the means by which a tourist can arrive or leave from a certain destination. The accessibility is accomplished by various means of transportation such as airlines, trains, cars and ferries. Accessibility is said to have direct effects in the numbers of tourists received in a country as for example a destination which is scheduled to have three flights in a week is likely to receive less tourists than the destination with daily flights inbound and out bounding.

3. Activities

Successful destinations need to broaden the scope of the activities offered so that they can well accommodate and entertain the consumers of the services. This is an important aspect in the success of a destination in a way that, if a place can offer products and services which meet the demands of the consumers, it can make them stay even longer than the planned duration of time and spend even more money as well. The availability of the activities offered in a destination are greatly influenced by the actions of innovation and product development e. g establishment of golf courses across the rivers, scuba-diving, jungle- trekking, river cruises etc. (IATA 2005, 16)

4. Amenities

City tourism is one of the fast growing aspects in developing countries. Amenities which can be included in the city tourism are such as restaurants, bars and shopping malls. Such amenities usually host a great deal of consumers who in most cases are interested in activities such as exploring the night life in destinations and shopping. (IATA 2005, 15)

5. Attractions

Attractions are the main pulling factors of tourists to a destination. Attractions can be categorised into heritage attractions and commercial attractions. The heritage attractions are mainly an inclusive of the sites carrying memories and experiences with an addition to the show places of world's natural wonders. The heritage attractions are such as; museums, historical sites and art galleries, national parks and zoos, fairs and festivals etc. (Cook et al 200-201)

The commercial attractions are the attractions which are usually developed in order to host the traveller's leisure time needs. The commercial attractions are such as amusement parks and theme parks. (Cook et al 2002, 208)

When it comes to business travels, tour operators usually try to arrange the events such as business meetings or conferences in the places where the quality levels of hospitality and facilities are good enough to match with the customer needs. (IATA 2005, 15)

2.6 Tour operator's business requirements

The expanding network in the tourism market has resulted into many changes in the business demands from both, sellers and buyers perspective. In order for a tour operating company to functions efficiently, it must cope with the business demands and commercial skills required. Currently, there is a high need for a broad cross-section of management, marketing, financial and technological skills for the business operations of the tour operating companies. (IATA 2005, 19)

Table 2. The following table describes the 5 main business requirements and skills for a tour operating company. (IATA 2005, 19-20)

CHARACTER	APPLICATION
VISION	A tour operating business needs to have a clear statement of the vision which explains the ambitions and expectations of the company achievements. This assessment is useful in the allocation and efficient utilization of company resources.
FINANCIAL COMPETENCE	Tour operators sell the intangible products as services outsourced from other service providers such as airlines, hotels, cruise ships etc. Thus, a strong financial management knowledge is an essential aspect for company success because the business is usually carried out on international levels and things like currency fluctuations, changes in air prices, commissions are out to be monitored correctly
SKILLED LABOUR	Tour operating business is a service oriented business which is characterised by communications between buyers and sellers in the delivery of service. Thus, in the highly competitive environment, the biggest team doesn't win but rather the more efficient team. Hence, the highly skilled staffs is more likely to offer services with a high degree of hospitality adding value to the quality of service and resulting into customer satisfaction. (IATA 2005, 15)
PRODUCT MIX	Product specialization is an essential aspect in building a strong company brand. In the flexible tourism industry, a balanced product mix will keep the business operations of tour operators running smoothly in a way that, if the product marketing is focused on one market segment, in times of political crisis e. g in Egypt or environment hazards e. g in Thailand, the tour operators might be out of business if they had specialized in the affected area
CREATIVITY	Creativity is an important part in product innovation as it focuses in building a base of the product development on the quality and uniqueness of the products. However, creativity is often applied in product innovation and development but ignored in other company departments. Creativity can result into smooth company operations when it is applied in other company operations to find effective business solutions.

2.7 Efficiency of tour operators

The key factor of efficiency in the performance of the business operations of tour operators start from the availability of a prospective mix of qualifications and skills of the staff members in a company.

The prospective mix refers to the fact that, the qualification of the employees can be unchanged over a period of time e. g the educational level, but the perfection in the performance is attained when the qualification in combined with the new and emerging knowledge through various professional courses and trainings arranged in or out of the company in order to sharpen the skills of the staff. This will add value to the company efficiency as the staff will be able to overcome the encounters of the newly emerging challenges in the daily company operations. (IATA 2005, 19)

The following figure demonstrates the mix of various company activities in the course of achieving high level of efficiency.

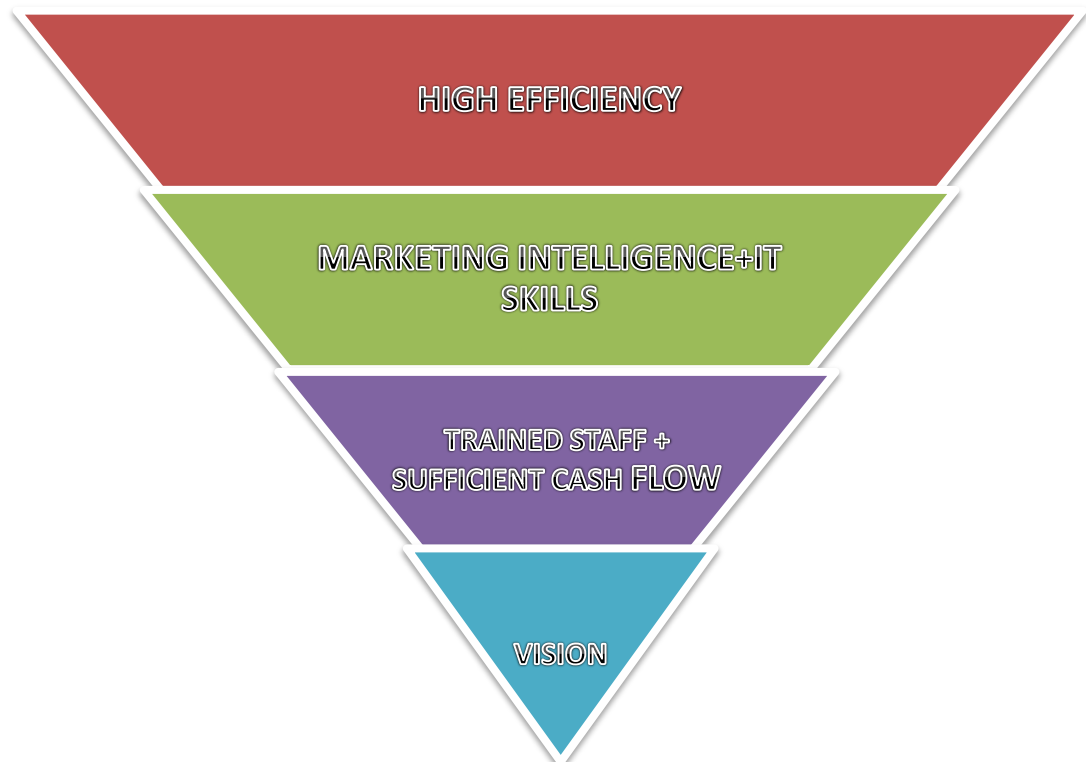


Figure 5. Efficient company activity mix. (IATA 2005, 19)

2.8 Government and tourism

The governments have a great role to play in the performance of the actors in the tourism industry e. g tour operators, travel agents etc. One of the main aspects in the act of competitive destination in the tourism industry is the availability of high standard and well established infrastructural systems such as transport and communication facilities, health and sanitation, safety and security. (IATA 2005, 17)

These aspects of infrastructural systems mentioned in the previous paragraph are beyond the scope of operations of tour operators and for that reason they have to be monitored by other bigger governmental organizational because they can pose direct threats in the tourism industry if they are not controlled. The tourism industry has observed many scenarios of destinations losing the business competitiveness and long term reputation as a result of a failure in the governments to maintain certain levels of favourable environments for the tourism actors to function efficiently. (IATA 2005, 17)

Roles of government in the tourism industry;

1. Authority

The government is an organization which is sovereign to put forward the laws and legislations, and also establish some policies which will have positive impacts in the tourism industry if they are well monitored. The authority invested in the government can influence the tourism industry efficiency through various governmental sectors dealing with tourism matters at national, regional and local level. (Cooper & Hall 2008, 246)

2. Education and training

The government has an essential role to play in the creation of a strong brand of the tourism industry as it controls the national education and training systems. The government can achieve that task by establishing educational systems that will be supplying the tourism industry with well-trained and highly competitive labour.

3. Statistics and information

The government can supply the actors in the tourism industry with useful statistical information such as the number of arrivals and departure in a certain destination. These projects are usually facilitated by governmental organizations such as the national tourism board and the information can be useful to the company operations such as marketing and product designing but the project is in most cases too expensive for individual companies to conduct.

4. Market regulation and promotion

The government has the authority to regulate and control the markets in the tourism industry. This can include the control of competition and eradication of unfair business practices such as corruption which are in most cases performed by the dominant companies in the industry. In these cases, the government can use its departments such as the tourism board and the corruption prevention bureau in creating a positive brand through tourism promotion exhibitions in a local and international level. (Cooper & Hall 2008, 246)

5. Safety and security

Safety and security are some of the aspects which are highly prioritised by the tourists when it comes to choosing a destination. The government has many bodies which function to maintain peace, order and safety such as the police and army.

The actors in the tourism industry usually have smooth company operations in the places with satisfying levels of safety and security as it eases the delivery of service from the seller to the buyer and the sellers can utilize more resources in the course of product innovation and development.

3. Approaches and Methods

The research was conducted in Dar es Salaam - Tanzania and the method which was used in this research was case study. The method which was used to collect the data for the research was quantitative research method. Quantitative research is defined as a research method which uses numerical data in the course of studying various cases in a formal, objective and systematic way. Furthermore, it examines the variables and their relationship so as to identify the causes and effects in certain phenomena. (Burns & Grove 2005, 23).

The researcher adapted quantitative research method because the research topic was very wide as it involves the analytical studying of the challenges of tour operators and the effects poised by such challenges to the daily operations of the of the tour operators .

3.1 Data collection

The questionnaire was the main tool which was used to gather data in this research. Thus, the questionnaire design focused on addressing the main issues in the research such as the research problem and the theories which support the study. The questionnaire included a set of closed-ended questions. In this case, the respondents were limited to certain options which they were asked to select the answers.

The questionnaire also included a set of multiple choice questions in which the respondents got the opportunity to choose various options which were reflecting to their opinions. Lastly, the questionnaire consisted of the open-ended questions which gave the respondents a wider freedom in expressing their views on the discussion. These set of questions did not have options which the respondents will be required to choose.

3.2 Population and sampling

The research was conducted in Dar-es-Salaam, Tanzania. This was due to the fact that the research was aimed at studying the business practices in that area only. Another reason for the chosen are of study was the case of time limitation and limited budget as the research was being funded by the researcher himself by almost 80%.

In this case, the main target sample was all the company representatives from the available tour operating companies in Dar-es-Salaam, Tanzania regardless of the departments in which they are working.

The main aim of this research was to study the origin and types of challenges in the companies; hence it was relevant to accept information from staffs in different departments because challenges can originate from different departments in the organizations. For that reason, the random population sampling was chosen, as it refers to the situation in which each item in the population has the same probability of being selected. (Westfall 2012, www.westfallteam.com)

3.3 Data Analysis

Data analysis process was the follow up process after receiving the answered questionnaires from the representatives of the tour operating companies in Dar-es-Salaam.

The analysis was made through an appropriate assessment of the answers provided in the questionnaires in reflection to the main objectives of the research which was to find out the challenges of the tour operators. Thus, the aim was to give an awareness of the effects posed by such challenges and at last suggest the measures to eradicate such challenges.

3.4 Reliability

The reliability of the study refers to the repeatability of the measurements and the way that the study gives relevant results. Thus, if two or more evaluators end up in the same conclusions, the results are considered to be reliable. (Hirsjarvi, Rennes, Sajavaara 2009, 231)

The reliability of this study might change in a period of time due to the fact that this research is aimed at examining the business practices which are being influenced by the internal business operations and also external business facilitators such as the government policies (Taxes), company marketing strategies, etc. Thus, if those factors change, they might lead to changes in the business operations and the results provided by the respondents.

3.5 Validity

The research validity refers to the accuracy or the way that the research methodology applied, will be able to measure exactly what is supposed to be measured in the research. The research results can sometimes be distorted because the respondents can misunderstand the questions or in other cases the investigator can translate the results in his/her own perspectives. (Hirsjarvi et al 2009, 232)

It is impossible for a quantitative research to attain the highest degree of perfection which is 100%. Hence, quantitative researches possess a measure of standard error which has to be acknowledged. (Monion & Morrison 2007, 133)

The researcher tried to improve the degree of validity of the research by avoiding data collection and handling distortions through a questionnaire with clear and precise questions so that the respondents would not give irrelevant answers as a results of having unclear questions.

4. Key results and discussion

The aim of this research was to study the challenges affecting the business operations of tour operators in Dar-es-salaam, Tanzania. Moreover, the study was aimed at identifying the point of origination of such challenges in order to be able to suggest the effective measures to eradicate those challenges. Thus, this chapter contains the results from the set of questions designed and distributed to the company representatives to be answered. This chapter also contains an insightful discussion and analysis about the questionnaire results in order to attain the highest level of accuracy in finding the causes of the challenges of tour operators.

A total number of 25 questionnaires were distributed to the tour operators in Dar-es-salaam, Tanzania to be answered by the company representatives. The company representatives were chosen randomly regardless of their working position in order to receive answers from different perspectives and get a clear understanding of the business operations. The answers from the respondents are such as follows;

Company ownership

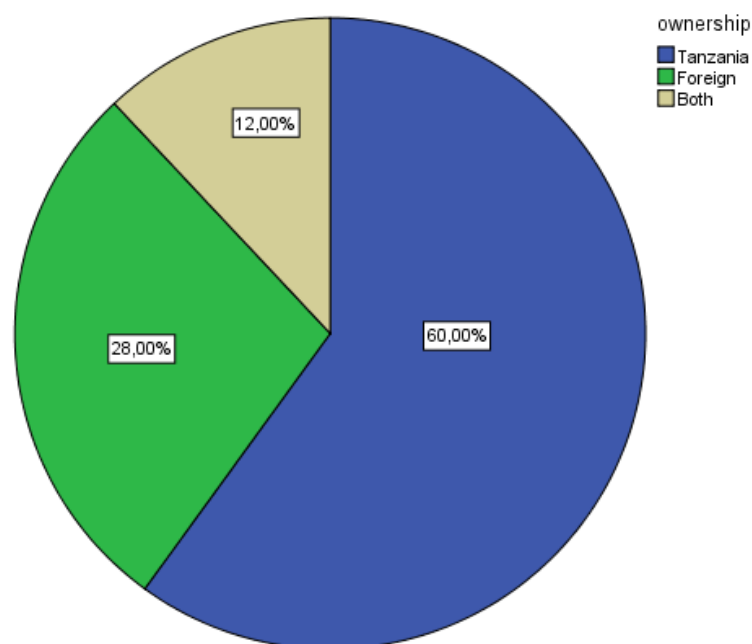


Figure 6: Ownership of the companies

n= 25

The results from the respondents show that 60% of the tours operating companies' owners are Tanzanians. 28% of the businesses owners are originated from other countries (foreigners) and 12 % of the tour operating companies in Dar-es-Salaam is jointly owned by both Tanzanians and foreigners. The fact that 60% of the companies are owned by the natives brings up an assumption that the country's policies in setting up new companies are more favorable to the natives than the foreigners.

However, the 28% of the companies in a developing country being owned by the foreigners is a strong reason enough not to question a lot about the government policies being biased against the foreigners in establishing their business operations.

More than a quarter of the companies are owned by the foreigners in a sense that they see the potential of investing and succeeding in their business operations in the country. 12% of the companies being owned by the natives and foreigners together is a strategic way of prosperity in the business operations in a foreign country. This means that the two parties will be able to join

their strengths (knowledge and capital) and discover even more opportunities so as to reduce the weaknesses and threats in the business operations.

Number of employees in the companies

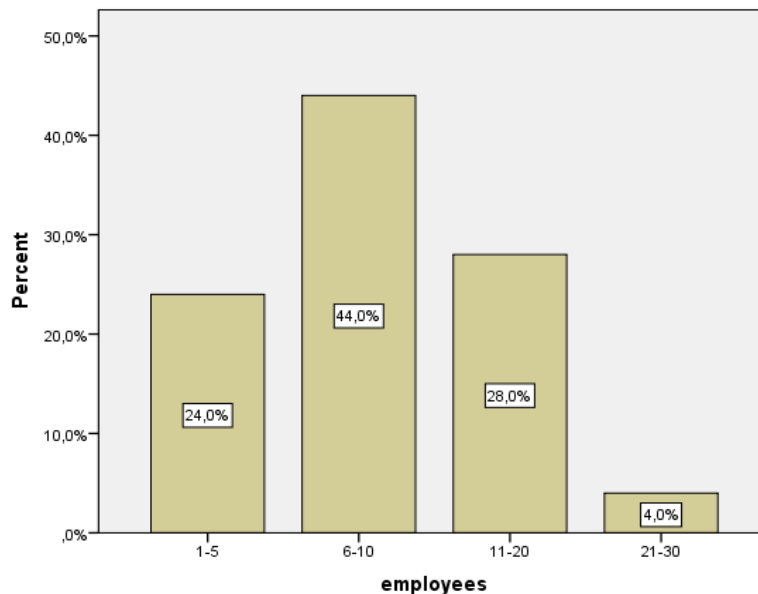


Figure 7: Number of employees in the companies in percentage
n =25

The results from respondents about the numbers of staff in the companies show that 44% of the companies have a total number of employees in between 6 and 10. This shows the uniformity in the labor demands as almost half of the companies have equivalent numbers of employees.

Only 4% of the company respondents had a total number of staff in between 21-30. The small number of companies having a big number of employees can be explained by the assumption that the tour operating business is a service oriented business and most important it is a seasonal business thus it is not a business which is active all year round, that could be the reason why almost half of the companies have 6-10 employees.

The deviation of 4% having 21-30 employees might be a result of the diversification in the company operations such as the companies offering a wide range of services, they will also be required to hire more people to deliver such services to the potential customers.

28% of the respondent companies had 11-20 employees and also 24% of the companies had 1-5 staff members

Work position of the respondent

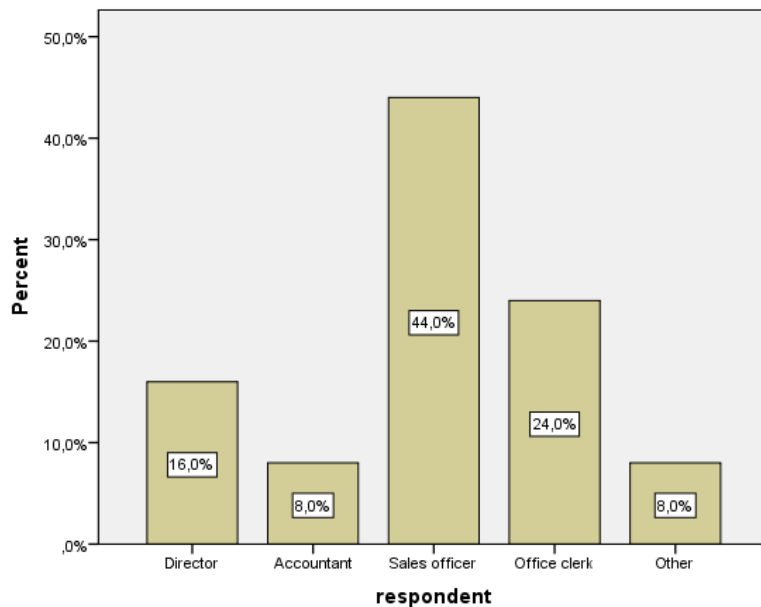


Figure 8: positions of respondents

n= 25

This graph was aimed at explaining the number position of the company representatives in answering the questions. The aim of knowing the position of the respondent is that it will help to describe the reliability of the provided data in a sense that the knowledge about the company operations will always differ depending on the duties which are performed by the staff. 44% of the representatives were the sales officers in the companies, 24% were office clerks followed by the directors who accounted for the 16% of all the respondents, and lastly it was the accountants and others with a share of 8% each.

The thesis was aimed to study the challenges of tour operators by assessing the products and services offered and the difficulties in the daily business operations. In order to achieve the aim, it was very important for the questionnaires to be filled by the personnel who were familiar with such matters. 44% of the respondents being sales officers gives us an impression that usually the sales officers are acquainted with a strong knowledge about the sales and products offered by the company. The office clerks being 24% and directors 16% is a fair share and will add value to the

results gathered because the office clerks tend to have the general knowledge about the company and the information from directors can be relied upon in offering in depth details about the company operations.

The accountants and others had a contribution of 8% each which is not a bad result to the research in terms of reducing the degree of reliability and validity of the study because the study was aimed at assessing the products and services and not much of financial aspects as most of the accountants are involved in, however there were some information which was reliable such as the tax levels in the country and the effects in the company.

Duration of company operations

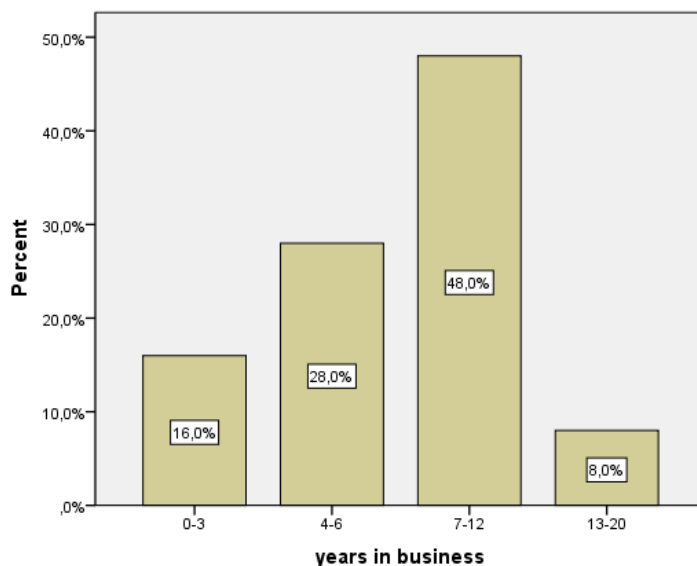


Figure 9: Duration of business operation

n=25

The above graph shows the number of years in which the companies have been performing their business operations. 48% of the responding companies have been performing business operations for 7 to 12 years. This means that almost half of the companies in the industry are well established and matured companies. 28% of the respondents were the companies with 4-6 years of performing business. 16% of the companies had a business operation experience of a maximum of 3 years meaning that they are the newly established companies. 16% of the 25 respondents mean that in actual figures only 4 companies were newly established companies. The small number of new companies gives us an assumption that the destination could have some

unfavorable conditions (policies) for establishment of new companies (taxes, unfair competition practices).

The cross-tabulation table (Table 3) gives an observation that most of the companies in the group of 6-10 and 11-20 employees have been in the business for 7-12 years. The other group which has 1-5 employees, had been operating for 1-3 years, this leads us into a conclusion that there is a relationship between the business operating duration and the number of employees in the company.

Another finding is that the optimum number of employees to cover the business operations demand could be in between the groups of 6-10 and 11-20. This is the optimum number because from that point, even when the number of employees increased, they did not have an effect on the years of business operations which was 13-20. The only companies which had business operations for more than 20 years fell in the group of companies with 6-10 and 11-20 both with one company each.

Difficult to establish a tour operating company

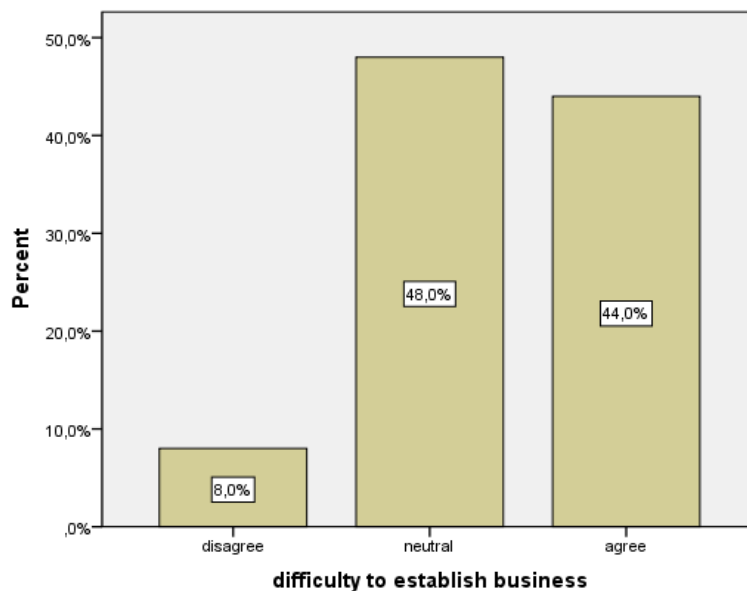


Figure 10: Difficult to establish business

n=25

The graph above is aimed at giving the results on the conditions for establishment of a new tour operating company. The aim of this question was to test the hypothesis developed in the theory

about the challenges which are faced by the tour operators in Dar-es-Salaam, Tanzania. The answers were divided into five options but there no respondents who strongly disagreed or agreed to the suggested theory.

48% of the respondents answered “neutral” meaning that they neither agreed nor disagreed. 8% of the respondents disagreed with the suggestion that it is difficult to establish a company. However, 44% of the total respondents making an actual figure of 11 companies, agreed with the suggested aspect.

Closed ended questions with many options in questionnaire have an advantage of getting correct results by the respondent being able to choose exact option which expresses his/her opinion. In other circumstances, the respondents might have some difficulties in understanding and estimating levels of for instance “strongly agree vs agree” and “strongly disagree vs disagree” than if they had only two options of supporting or opposing. In this case we can assume that there could be some difficulties in the establishment of new companies as only 8% disagreed and 44% agreed.

Government assistance

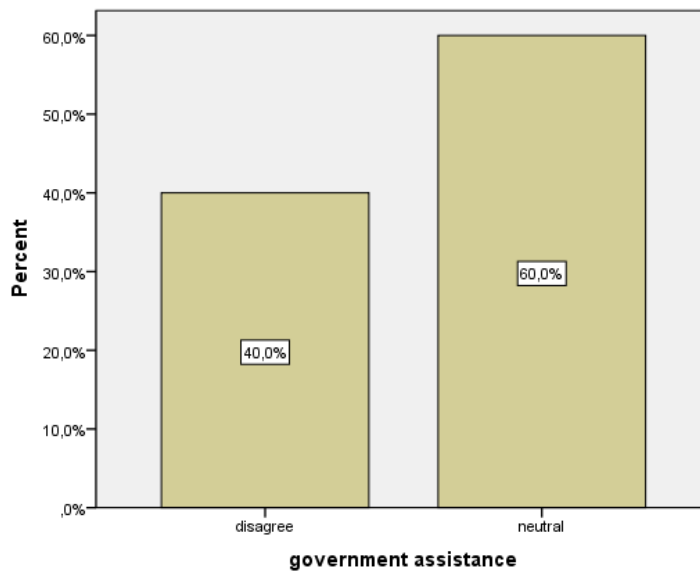


Figure 11: availability of government assistance

n=25

The graph above shows the response about the availability of government assistance in all aspects involving the company operations. There were no respondents who answered “strongly disagree”, “agree” or “strongly agree” leaving only two set of answers to be discussed “disagree and “neutral”.

40% of the total respondents disagreed with the suggestion that there is government assistance. 60 % of the respondents were neutral about the availability of government assistance giving us an assumption that they are not aware of the existence or non-existence of the government assistance. The unawareness in the companies which gave a neutral answer about the government assistance could be a result of their company operations not being affected by the government assistance. I can suggest that the government assistance in the tour operating business could be very low due to the fact that 40% of the respondents disagreed and more than 60% were neutral about the situation.

Legal framework for tourism industry

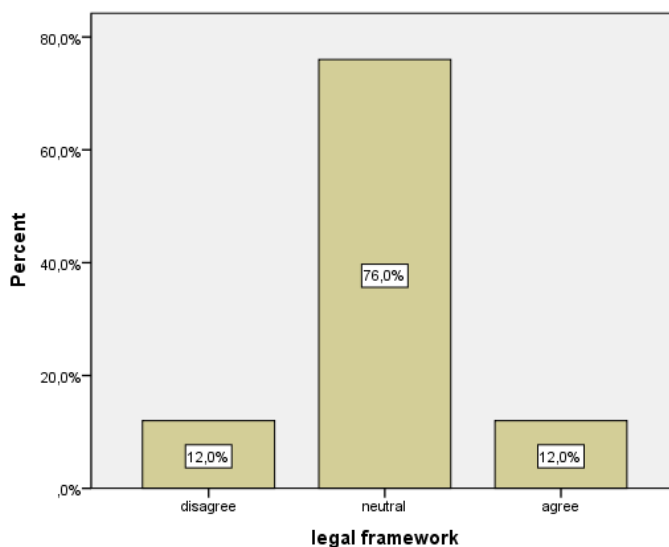


Figure 12: Legal framework for tour operators

n=25

The graph above is about the results from the suggestion that the “legal framework regulating the tour operators is complicated”. There were no respondents who strongly agreed or strongly disagreed with the suggested phenomenon. 76% of the respondents were “neutral” about the

situation which is more than 3/4 of the total respondents making it 19 out of 25 respondents in actual figures.

The reason for high neutral results could be the fact that the companies are unaware of the effects of the set of laws and regulations to be followed by the tour operating companies due to poor implementations of the legal framework. On the other hand this could bring an assumption that the question was not clear or well understood by the respondents that is why most of them did not want to agree or disagree. 12% of the respondents disagreed with the matter while 12% of the remaining respondents agreed with the legal framework being complicated.

The fact that there wasn't any company which strongly agreed or strongly disagreed with the matter and only a few respondents agreed and disagreed, this brings us to the suggestion that the legal framework whether it is being complicated or not, it doesn't have much effects in the daily operations of the tour operating companies.

Difficult to raise capital

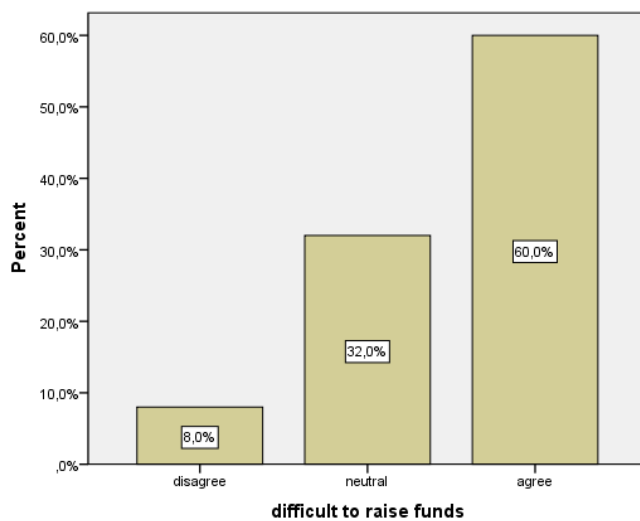


Figure 13: Difficult to raise funds

n=25

The above graph gives the results about the suggestion that tour operators have difficulties to raise funds/capital to invest in the business. The aim of this question was to find out the exact point of origin of the challenges faced by the tour operators. 60% of the respondents "agreed" with the suggestion that it is difficult to raise funds; this is 15 respondents out of 25 total

respondents. 32% of the respondents were “neutral” about the suggestions while only few 8% “disagreed” with the matter.

The 60% respondents who agreed with the phenomenon can be explained by the assumption that the difficulties in raising funds to establish or invest more so as to have efficient business operations are being brought about by the banks for instance having strict rules in providing loans or the investors do not have enough faith in the prospects of the tour operating business that is why they are not willing to invest in the industry.

The 32% and 8% of the respondents who gave “neutral” and “disagree” results might be due to the unawareness of the situation because they didn’t face such a challenge, for instance they already had enough capital to invest in the business when starting their business operations.

Availability of high tax

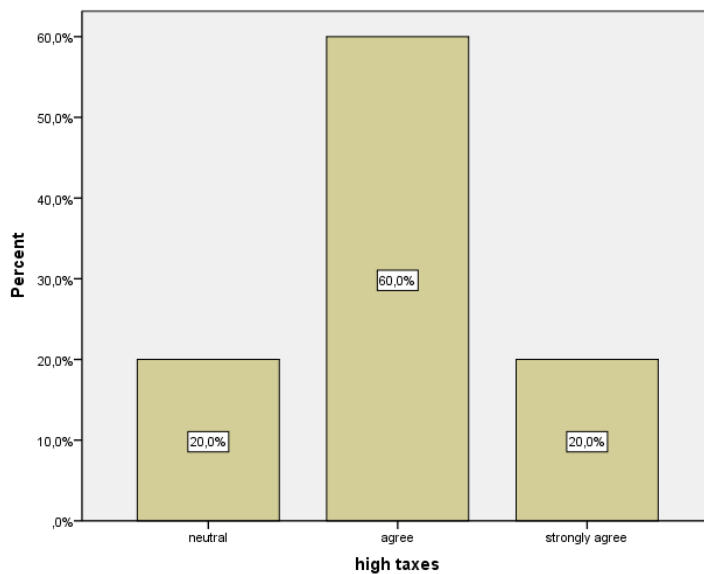


Figure 14: High tax charges

n=25

The graph above shows the results about the suggestion that the taxes charged by the authorities to the tour operating companies being high. This phenomenon was aimed at discovering the challenges which are faced by the tour operators. There were no respondents who gave the results which are “strongly disagree” or “disagree”. This is an obvious result considering the fact that majority of the profit oriented companies consider tax as a reduction to their revenues and

are not willing to pay, in that way they will always suggest that it gets lowered. 60% of the respondents which is 15 respondents in actual figures “agreed” with the availability of high taxes, 20% of the respondents “strongly agreed” with the suggestion while 20% were “neutral” about the tax being high. The neutral results may have occurred because the respondents either couldn’t differentiate the amount of tax which is high or low, another assumption could be the reason that the companies were being more realistic about the importance of tax and did not have complaints.

Overall, I can suggest that the tax levels are high because there was no any respondent who had disagreed or strongly disagreed with the suggestion and also more than a half of the respondents agreed with the phenomenon.

Availability of skilled labor

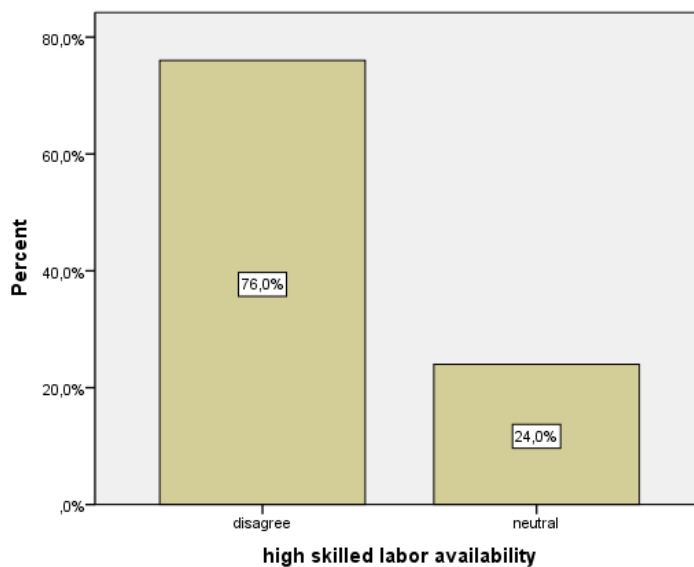


Figure 15: High availability of skilled labor
n=25

The above graph shows the results about the easiness in finding skilled labor. This aspect was developed so as to find out whether the challenges faced by the tour operators are resulting from the availability or shortage of skilled labor. There were no respondents who agreed, strongly agreed and strongly disagreed with the suggestion that the availability of skilled labor is high. 76% of the respondents which makes a total of 19 respondents out of 25 disagreed with the suggested aspect. This means that there is a shortage of supply of skilled labor to match with the demands

of the industry. 24% of the respondents were neutral about the availability of high skilled labor, this can lead to the assumptions that may be the companies are still in the early stages of growth and have few company operations, thus; they haven't yet faced real competition from the labor industry and don't recognize the availability or shortage of skilled labor because of their limited company operations forcing them to have few employees. However, we can finalize that the tour operating industry in Dar-es-Salaam is facing some skilled labor shortages due to the fact that more than 3/4 of the respondents disagreed with the availability of skilled labor and none of the respondents supported the theory.

Availability of training for tour guides

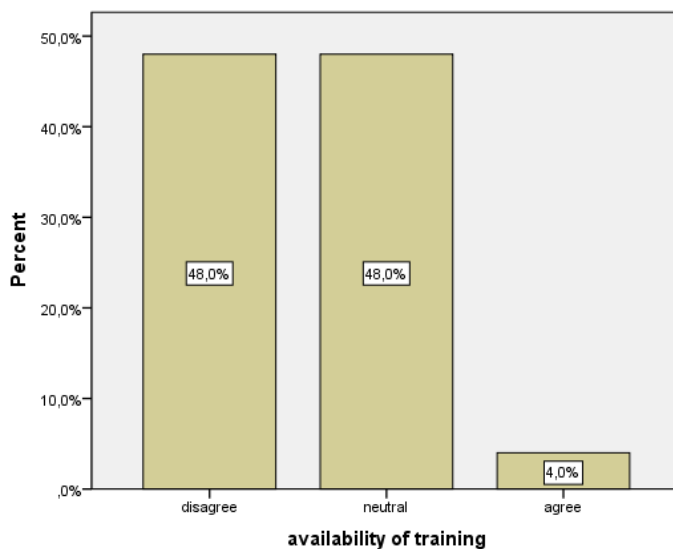


Figure 16: Availability of training

n=25

The above graph shows the results about the availability of training to the staff members in the tour operating companies. This hypothesis was developed in order to identify the origin of challenges of tour operator. The results show that there were no respondents who strongly agreed or strongly disagreed with the suggested aspect.

48% of respondents were neutral about the availability of training, this could be due to the availability of a fair share of trainings which have not proven to be efficient that is why almost half of the total respondents were neutral and only few respondents (4%) agreed with the

suggestion of availability of training to the tour operators. 48% of the respondents which is 12 companies in actual figures disagreed with the phenomenon.

The results might bring us to the assumption that trainings are available at a very minimum level and may be they have proved to be inefficient, but it would be difficult to suggest that there are no training sessions at all because none of the respondents strongly disagreed with the aspect and there were few respondents who supported “agreed” that the training sessions are available.

Safety and security

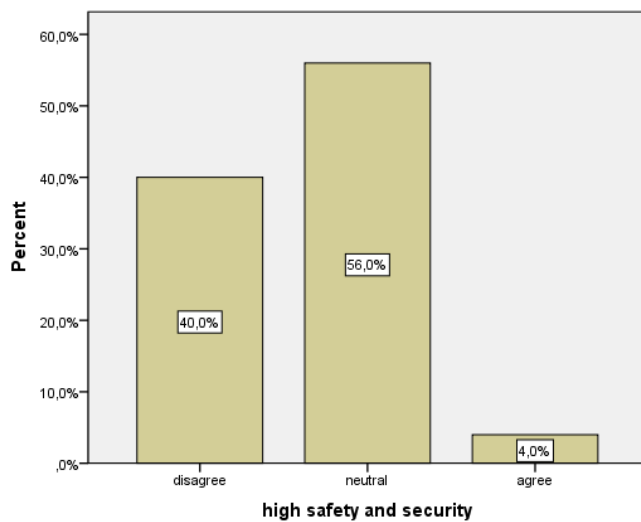


Figure 17: High safety and security

n=25

The graph above shows the results from the suggestion that the safety and security is high in all aspects involving the tour operating business. The results show that there were no respondents who “strongly disagreed” or “strongly agreed” with the suggested phenomenon. 56% of the respondents which is 14 companies out of the total 25 in actual figures answered “neutral”, meaning that their expressions lie in between disagree and agree.

More than half of the total respondents gave the neutral results, thus, we could have easily end up with an assumption that the question was not well understood by the respondents to support or oppose the suggested matter, but the number is too high to close the matter with such a simple assumption.

The fact that many companies gave “neutral” give us an assumption that the safety and security might be available in the destination but not as “high” as the statement suggests, also the safety and security might not be as effective/efficient to encounter the demands of the industry. This assumption can be supported by the fact 40% of the respondents disagreed with the statement, this figure is strong enough to suggest that there is a slight dysfunctional in some aspects involving safety and security in the industry.

4% of the respondents agreed with the statement may be due the availability of enough budgets to hire private security companies or the companies have been operating for a short time to suffer the consequences of low safety and security.

Level of business competition

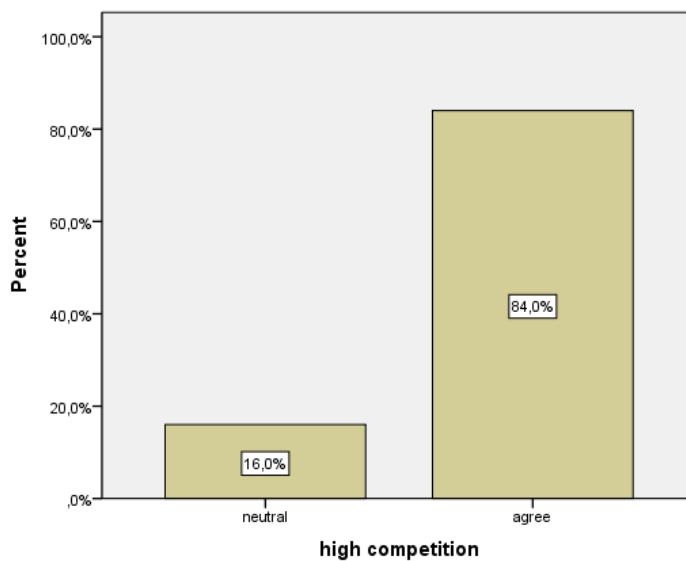


Figure 18: High competition

n=25

The graph above shows the results about the suggestion that the competition in the tour operating business is high. The results show that there were no respondents who strongly disagreed, disagreed, or strongly agreed with the statement. 84 % of the respondents which is 21 companies out of 25 in actual figure “agreed” with the availability of high competition. 16% of the respondents gave neutral results which means their expressions were in between agree and disagree.

The number of neutral respondents is very low and it might lead us into assumption that some of the respondents were not willing to share their opinions about the competition in the business operations or the companies had some not experience high competition which had some effects in their business operations. The fact that more than 3/4 of the respondents agreed with the statement, it brings an impression that the competition is high in the industry and it has some direct effects (negative and positive) in the daily business operations of the companies.

Attitude of tourists towards the services offered by the tour operators

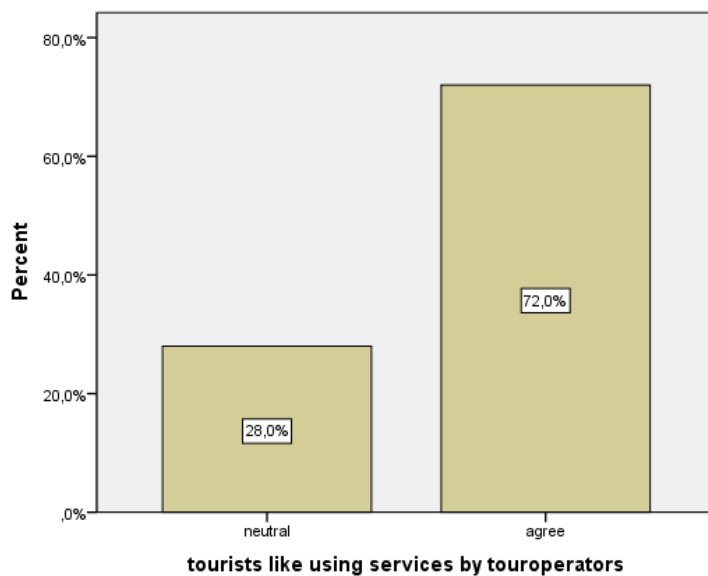


Figure 19: Tourists like to use services offered by tour operators

n=25

The above graph shows the results of the attitude of the tourists towards the services offered by the tour operators. The aim of this question was to identify if the business operations of the tour operators are being affected by the quality of the services they deliver to the customers.

The results show that there were no respondents who “strongly disagreed”, “disagreed” or “strongly agreed” with the suggestion that tourists like using services offered by the tour operators. 28% of the total respondents which is 7 companies out of 25 had neutral “opinions”, meaning that their views were in between “agree” and “disagree”. 72% of the respondents which

is 18 companies in actual figures, agreed with the suggestion that tourists like using services offered by the tour operators in Dar-es-Salaam, Tanzania.

The fact that there were no respondents who had opposing opinions towards the statement that tourists like using services offered by the tour operators, and almost 3/4 of the respondents agreed with the statement, gives an assumption that the tourists have a positive attitude towards the services offered by the tour operators.

The origin of the customers

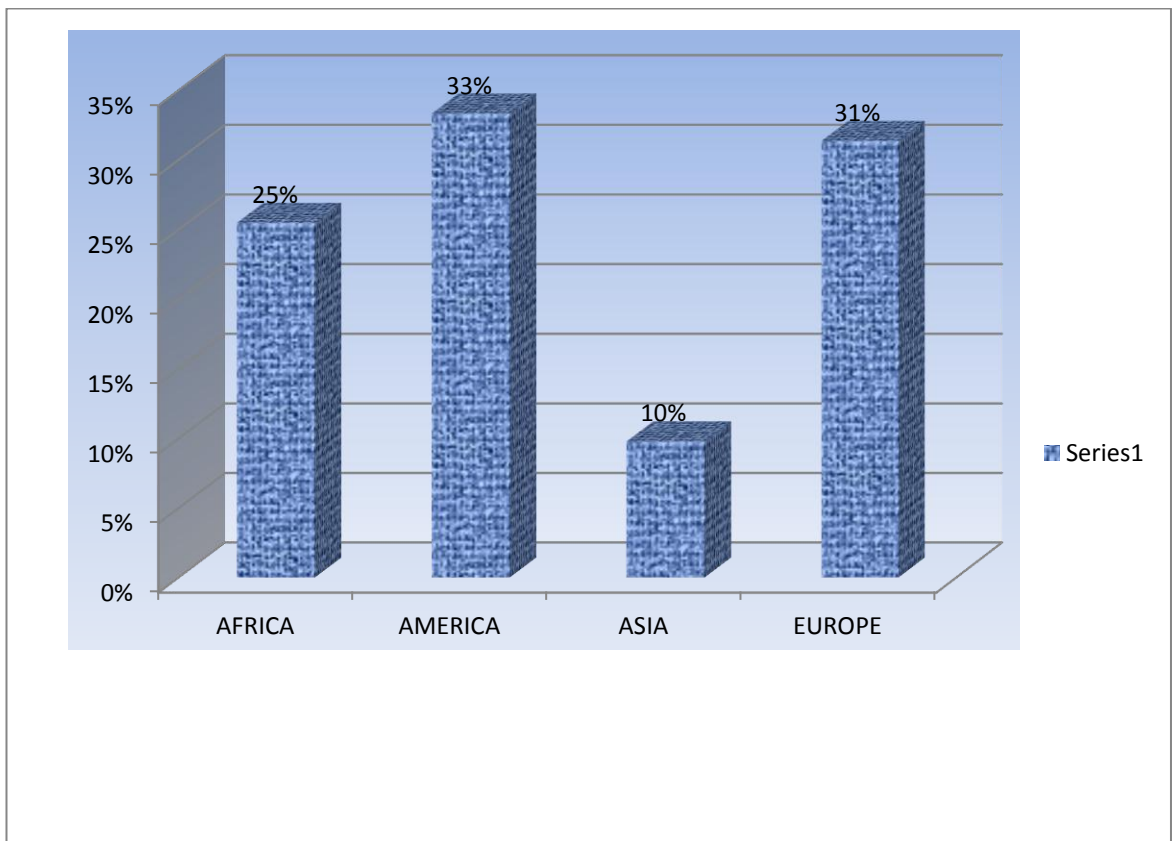


Figure 20: Customer origin

n=25

The above graph shows the origin of the customers received by the tour operators. The aim of this question was to identify the difficulties in the company operations of the tour operators by studying relation between the customer origin and the. The variation of the customer arrival results can be useful in the reduction of the challenges of tour operators as the companies can

improve the marketing strategies to attract more customers from the areas which provide low customers and hence increase their revenues.

The results show that 33% of the customers are originated from the Americas. The results also show a slight difference between the customers from America and Europe as tour operators suggested that European tourists make 31% of the total customers. These results can be explained by the assumptions that the marketing processes have concentrated much on those areas than the other areas. Another assumption could be English is the official language in central and northern America thus the tourists do not face language barriers in Tanzania as Kiswahili and English are the official languages. (Tanzania 2012, www.tanzania.go.tz)

The African tourists make 25% of the total number of customers received by the tour operators. This percentage is low in relation to the fact that the countries are in the same continent which lowers even the costs of travel but it's not the case because of the assumption that the pulling factors such as tourism attractions in the African countries are more or less similar e.g. weather, nature contents such as the flora and fauna in the national parks, socio-cultural behaviors of the people.

The services offered by the tour operating companies

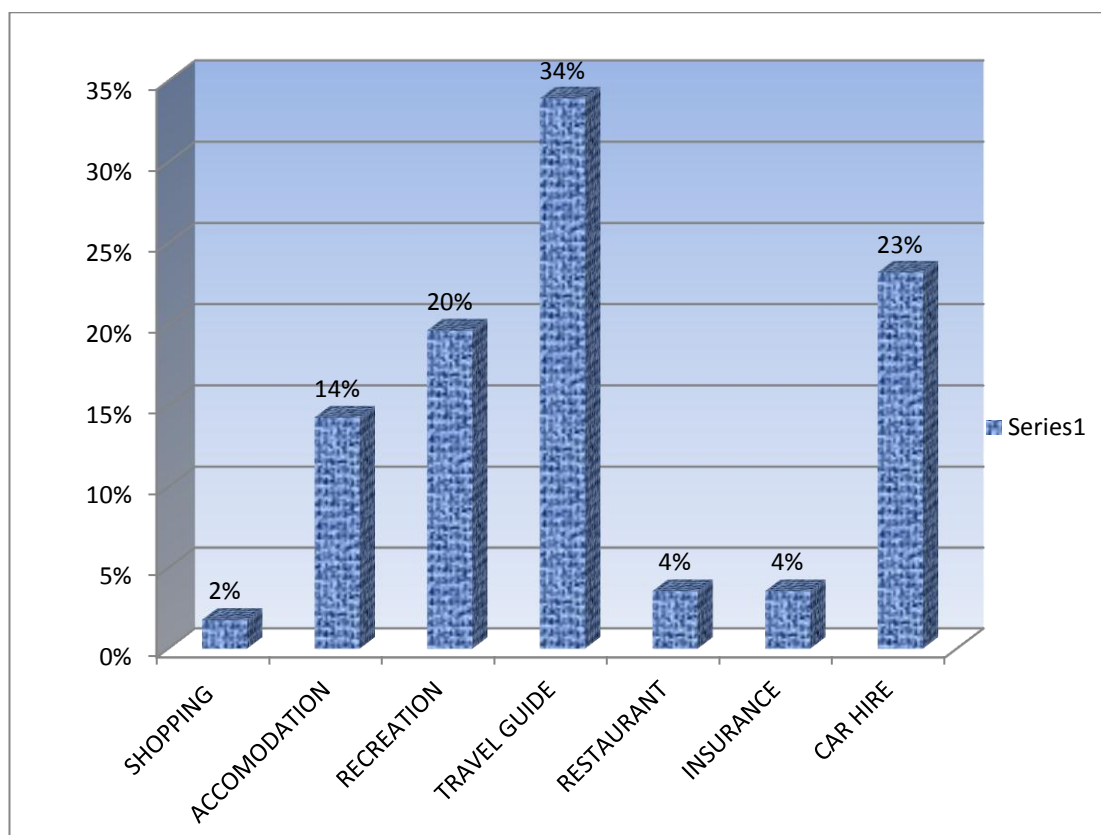


Figure 21: Services offered by the company

n=25

The above graph shows the results of the services offered by the tour operators in Dar-es-Salaam. The question was aimed at finding the origin of the challenges of tour operators by studying the available tourism services in the destination. The results will also help to identify how the changes (increase or decrease) in the availability of services can reduce the challenges affecting the company operations.

The results show that travel guide services are the most popular services offered by the tour operators with 34%. The other services which are mostly offered by the tour operators are the car hiring services with 23% followed by recreational services with 20%. These 3 services are the widely offered by the tour operators and this can be explained by the fact that Tanzania is rich in tourism nature attractions, (Tanzania tourism, 2012), this creates demands for the accessibility which in return increases the demands of the car hiring service and also the tour guides to help the tourists familiarize with the environment.

The results also show that the tour operators offer a limited supply of accommodation services which is only 14% compared to other services. This can be explained by an assumption that there is a poor linkage between the tour operators and the service providers such as the hotels.

Accommodation should have been the leading service delivered to the customers as most of the customers are originated from the far countries in America and Europe, thus accommodation is a necessity to them as they will spend some days in the destination.

Restaurant services and insurance services have 4%, the shopping services are the least offered by the tour operators with 2%. These results give us an assumption that the demands of the services by the customers might be low that is why there is low supply as well, another assumption could be the tour operators do not enough resources (money and skills) to deliver such services and for this reason, the services might be delivered directly by the service providers such as insurance companies and restaurants.

Challenges in company operations

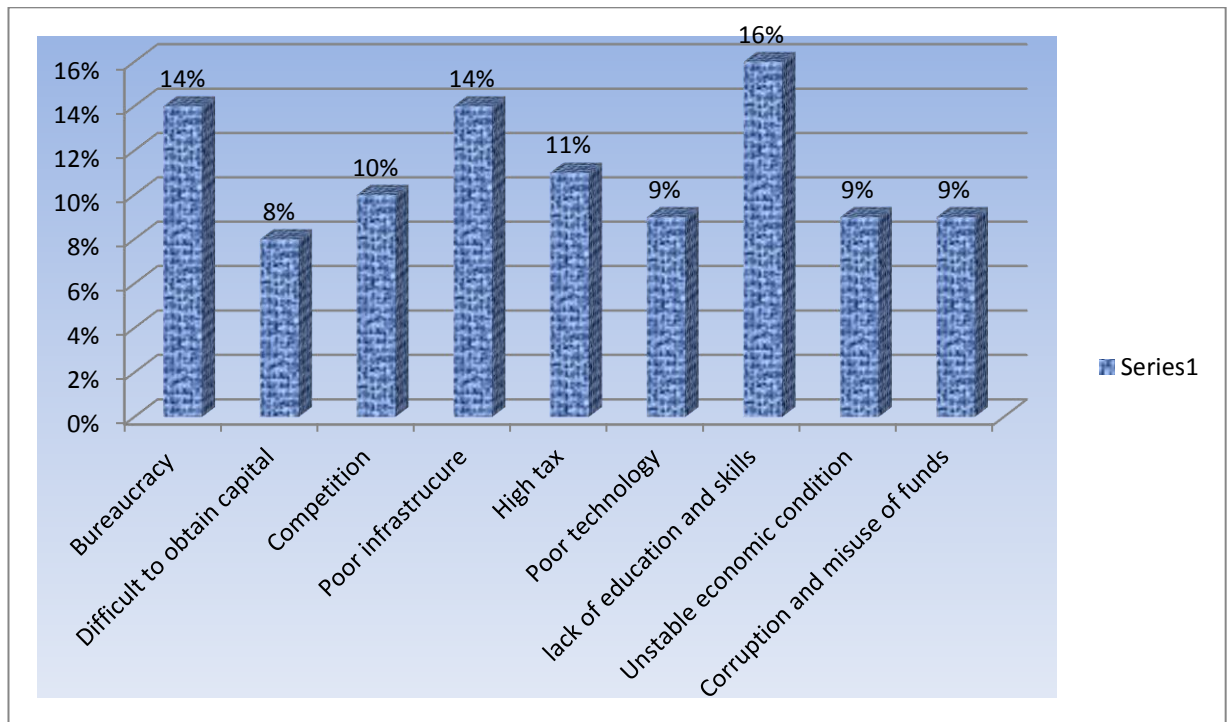


Figure 22: Most difficult things in business operations as a tour operator
n=25

The above graph shows the results of the most difficult things in the daily business operations of the tour operators. This was an open ended question which was aimed at receiving the direct views of the tour operators about the challenges they face in their business operation from the internal and external perspectives.

The results show that the lack of education and skills was the most popular problem (16%) which poses some challenges in the performance of the tasks assigned to the staff. Difficulties in obtaining capital had 8% which is the lowest amongst the other aspects. This can bring challenges such as having limited resources to offer a wide range services and increase the revenues and in return stay competitive in the industry in many ways e.g. paying sufficient salaries to attract and retain skilled workers, also the capital can be invested in the other daily operational activities such as marketing etc.

N.B. The graph shows only the most difficult aspects i.e. the aspects which pose a great deal of effects in their company operations meaning that there are other difficulties faced by the tour operators but they might be happening at a small scale that is why they were not suggested by the tour operators.

The question “Write down what tourism authorities (or institutions) could do to ease your business operations” was an open ended question which was developed with an aim of receiving the direct opinions from the tour operators which will in return help to reduce the challenges by suggesting the things which should be done by the external actors (authorities or institution smoothen the business operations. The results collective views were such as follows;

1. Reduce bureaucracy in dealing with tour operator’s issues; government should start incentive programs to assist tour operators.
2. Reduce taxes, charges and fees especially to foreigners since they are very high.
3. Invest in educational programs in tourism by supporting the establishment of more educational institutions offering tourism education on bachelor’s and master’s levels, also the cooperation of institutions and companies in training tour guides should be improved.
4. Improve infrastructure in the country; more investments should be done to make the tourism sites easily accessible.
5. Increase marketing and promotion of tourism to bring more visitors to the country.
6. Regulate and reform the industry’s legal framework in tourism to make it easier for tour operators to adapt and implement the laws, improve the policies governing tourism to encourage more investment and efficient in the sector. Current policies governing the tour operations should be updated so that they can make it easier for tour operators to adapt to the business environments in Tanzania.
7. Provide incentives for tour operators to make them operate efficiently.

8. Develop a network of tour operators to make it easier for them to perform their business operations such as marketing, advertising and getting contacts and connections.
9. Increase the powers to the authorities to fight against corruption as it poses threats to the development of the industry.
10. Increase safety and security to the tourists.

5. Conclusions and recommendations

The aim of this study was to study the challenges of tour operators and the origin of such challenges. This chapter of conclusions and recommendations will finalize the achievement of the thesis by outlining the challenges and the point of origination in the conclusion part and suggesting the possible measures towards the eradication of the challenges in the recommendations part.

5.1 Conclusion

The collective analysis shows that there are challenges which originate from the external business environments and internal business environment. However, they all had negative effects in the internal company operations such as explained below;

- The number of employees seems not to be affecting or posing challenges to the company operations. The tour operating companies are hiring staff according to the demands of the company operations and this is an effective cost reduction and controlling method. This phenomenon can be justified by the fact that there is a noticeable level of uniformity in terms of the number of employees in the companies and the limited amount of services offered by the tour operators in the destination.
- Sharing of company ownership between the natives and the foreigners is a good strategy of attaining success in the business operations. However, the basis of sharing must involve aspects such as a proper mix of capital to be invested in the business operations, knowledge to be applied in the product innovation and development and competitive skills to be applied by the employees in performing the assigned tasks.
- The difficulties in establishing a company can be caused by many internal and external factors. Very few tour operating companies were registered in the period of three years which can be a challenge originating from the unsupportive government policies or unfair business environments. The suggestions from the research results that it is difficult to raise capital and also the income tax charged by the government being high poses some challenges in the establishment and survival of newly established companies

There are some business operation challenges which can be influenced a little by the internal company operations. These challenges in most cases arise from the external business environments such as the global economic crisis, terrorism etc.

- The government offering little assistance to the tour operating companies is an origin of other challenges in the business operations. The results show that the legal framework governing the tourism industry is poor and the safety and security is low. These aspects were supposed to be controlled by the governmental bodies such as police and legal firms but the consequences will be suffered by the companies which will receive low numbers of customers as the tourists tend to avoid insecure destinations.
- The difficulties in finding competitive and skilled labour are a challenge which is influenced by the external environments but has some direct effects to the internal company operations. This challenge can be justified by the research results which suggest that there is low availability of training in the tourism industry.
- The competition between the tour operating companies is high. This phenomenon can be explained by the study conducted in the research about the services offered by the tour operators. The results show that there is a noticeable level of uniformity on the limited services offered by the tour operators. The limited availability of services leaves few options for the customers to choose, this leads into high competition in the industry as the companies will be fighting for customers.
- The industry has some potential to develop because the study shows that the tourists like using the services offered by the tour operators, meaning that few challenges are arising from the impression of the customers about the services.

5.2 Recommendations

After the completion of an insight analysis of the challenges of tour operators in Dar-es-salaam Tanzania, the following are the measures which are suggested in order to eradicate the challenges;

- **Reduce bureaucracy**

The administrative hierarchy in the tourism industry has some unnecessary protocols which act as obstacles in dealing with issues of tour operators which require immediate solutions. Also, the government should establish some incentive programs to assist tour operators in their business operations

- **Tax reform**

The manner in which the income taxes are charged should be reformed to support the establishment and survival of new companies. This can be done by actions such as reduction of tax charges for the newly established companies.

- **Invest in educational**

The government should invest in the tourism industry by the establishment of more educational institutions offering tourism education on the bachelor's and master's levels. Also the government should develop some policies to attract the private educational sector to conduct trainings to the tour operators with an ease.

- **Improve infrastructure**

The government should involve itself more into large projects such as infrastructural developments in country i.e. media of transportation such as land, water and air to as to make the tourism sites easily accessible.

- **Destination branding**

The tour operators should work in correlation with the government body which is involved with the marketing and promotion of the country and the services offered by the tour operators. This can be done by market targeting and segmentation to explore business potentials in the areas which provide low number of tourists such as Asia. This also involves the creation of a network of tour operators by the companies to provide an ease in the business operations such as marketing, advertising and business connections with other international tourism service providers.

- **Regulation of the legal framework**

The legal framework in the tourism industry should be regulated to make it easier for tour operators to adapt and implement their business operations. The policies governing the tourism industry should be improved to encourage efficiency in the sector. Thus, current policies governing the tour operations should be updated so that they can make it easier for foreign tour operators to adapt to the business environments in Tanzania

- **Eradication of corruption and unfair competition**

The corruption in the industry should be dealt with by the increasing the sovereignty invested into the authorities to fight against corruption. Corruption causes unfair business practices; these might lead into domination of few companies in the industry and the other companies to be swept away.

The unfair business practices might be actions such as market acquisition practices which are done in unfair practices resulting into the industrial competition which is too strong for small companies to survive, hence posing some threats in the future prospects of the industry. Thus, corruption should be eradicated in order to pave a way for a fair and controlled competition which is based on the development of the tourism industry in terms of the services offered and the quality of other business operations.

- **Increase safety and security**

The authorities dealing with the safety and security should maintain it to the required levels of satisfaction. This is because the low levels of safety in destinations affect the efficient delivery of services to the tourists' i.e. recreational activities such as diving, parachuting, mountaineering etc. require a well-established and functioning safety plan which is to be applied in delivering rescuing services.

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Appendices

Appendix 1: Cross-tabulation table

Table 3: Employees vs. years in business

Employees	Years in business				Total
	0-3	4-6	7-12	13-20	
1-5	3	3	0	0	6
6-10	0	4	6	1	11
11-20	1	0	5	1	7
21-30	0	0	1	0	1
Total	4	7	12	2	25

Appendix 2: Questionnaire

QUESTIONNAIRE

Challenges of Tour Operators in Dar-Es-Salaam, Tanzania

Objective: To identify the source of challenges affecting business operations

Company name :					
Background Information on the company					
1.Ownership	Tanzanian	<input type="checkbox"/>			
	Foreign	<input type="checkbox"/>			
	Combination of Tanzanian and foreign ownership	<input type="checkbox"/>			
2. Number of Employees	1) 1-5	<input type="checkbox"/>			
	2) 6 - 10	<input type="checkbox"/>			
	3) 11- 20	<input type="checkbox"/>			
	4) 21 -30	<input type="checkbox"/>			
	5) 30 +	<input type="checkbox"/>			
3.The respondent	Director	<input type="checkbox"/>	Accountant	<input type="checkbox"/>	Sales Officer <input type="checkbox"/>
	Office Clerk	<input type="checkbox"/>	Other	<input type="checkbox"/>	What?

4. Which services are offered by the company? (tick the relevant boxes)

- Shopping services
- Accommodation services
- Recreational services
- Travel guiding services
- Restaurant services
- Insurance services
- Car hire services
- Other (what?).....

5. Where do most of your customers come from?

- Africa
- America
- Asia
- Europe

6. Years in business	1) 0 – 3	<input type="checkbox"/>
	2) 4 – 6	<input type="checkbox"/>
	3) 7 – 12	<input type="checkbox"/>
	4) 13 – 20	<input type="checkbox"/>
	5) 20 +	<input type="checkbox"/>

7 Indicate to what extent you agree or disagree with the following statements Where 1 = Disagree Completely and 5 = Agree completely						
		1	2	3	4	5
1	It is difficult to establish a tour operator business in Tanzania	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Government has a programme to assist tour operators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	The legal framework regulating tour operators is complicated	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Tour operators have difficulties to raise needed funds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Taxes on tourism income are very high	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	It is easy to find qualified tour guides	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	There is available training for tour guides	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	The safety and security of tour business operations is very high	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Competition in tour business operations business is high	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	Overall tourists like to use services offered by tour operators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. Please, write down 5 most difficult things in your business operations as a tour operator

- 1.
- 2.
- 3.
- 4.
- 5.

9. Please, suggest what tourism authorities (or institutions) could do to ease your business operations

- 1.
- 2.
- 3.
- 4.
- 5.

Thank you for your time to answer the questions