

ASSESSMENT OF TOURISTS PERCEPTION AND SATISFACTION OF TANZANIA DESTINATION

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Abstract

Tourism industry is very much affected with the perception that tourists carry with them about destination. Perceptions are always considered in relation to expectations and the dynamic nature of tourists' perceptions calls for regular assessment. This is because they are the basis that tourists use to evaluate the quality of services that was delivered. This study thus aimed at assessing the international tourists' perception on various attributes in Tanzania and examining their general satisfaction with Tanzania. It is quantitative in nature and utilized a survey research design. A total of 286 self-administered questionnaires were used in the analyses. These circuits are the Northern circuit (N), the Southern circuit (S), the Western Circuit (W), the Coastal circuit (C), and Zanzibar. Descriptive statistics (Frequencies, Percentages, Means, and Standard Deviations) and inferential statistics (one sample t-test) were performed to assess tourists' perception and satisfaction with Tanzania on culture, wildlife, landscape, accommodation, restaurants, security and safety, infrastructure, and tour guidance. Findings shows that Tanzania is doing relatively well on the basic factor endowments such as culture, wildlife, landscape, and accommodation facilities, but fairly poor on tour guidance, tourism infrastructure, and restaurants. From a marketing managerial perspective, the findings should assist the tourism policy makers and practitioners to guide or develop tourists' products by addressing areas where Tanzania as a destination has proven to be weak while improving further areas of strength which are basically the basic factor of endowments.

Keywords: Perception, Satisfaction, International Tourists, Destination, Factor, Conditions

Introduction

Despite the well-developed literature from western world and the emerging economies on tourists' perception and satisfaction, there seems to be inconclusive findings regarding what satisfies tourists on each destination. Each destination is unique and as a result, what dissatisfies or satisfies a

tourist in one destination might be different from what satisfies the same in another destination. For instance, while Alegre and Garau (2010) found that tourists complained about overdevelopment, congestion, and the dilapidation of the environment in Spain, Meng et al. (2008) found that employees' friendliness and quality accommodations were more important to tourist satisfaction than the unique natural environment in USA. However, studying the cause for decreasing tourists to Kenya, Akama and Kieti (2003) related the decline in the number of tourists to poor transportation and political unrest. There is paucity of research in the area of developing countries in general and Tanzania in particular. Thus far, a significant research gap exists on what would explain international tourists' perception towards a destination and their subsequent satisfaction or dissatisfaction. Only a few studies have been conducted in Tanzania on international tourists' perception in the country. Gössling, Bredberg, Randow, Sandström and Svensson (2006) focused on international tourists' perception on the importance of climate for travel decisions in Zanzibar. It is in this context that this study sought to examine international tourists' perceptions and the levels of satisfaction with the attributes provided by the Tanzania tourism sector. The study also intends to understand the tourists' perceptual differences along demographic features and countries of origin.

Tourism, especially international tourism, is critical to the Tanzania's economy and is one of the fastest-growing activities in the world (Bashagi and Muchapondwa, 2009). International tourism incorporates the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year, for leisure, business, or other purposes (WTO, 2007). The sector is a major source of foreign exchange and it plays a pivotal role in the country's economic growth and development estimated to account for 12% of the country's GDP (Kahyarara and Mchallo, 2008). In 2007, Tanzania tourism sector directly and indirectly contributed US\$1.6 billion to the economy, while in 2008, the contribution declined to US \$1.1 billion (Mitchell, Keane and Laidlaw, 2009). Shitundu and Luvanga (2003) stated other advantages of the sector as boosting sales of different goods and services as well as cultural entertainment. However, it is in recognition of its importance that the Government of Tanzania came up with the National Tourism Policy in 1991(Revised in 1999). It is aimed at encouraging the development of sustainable and quality tourism that is culturally and socially acceptable, ecologically friendly, environmentally sustainable, and economically viable. While the policy is focused on addressing the national tourism challenges (supply side constraints), it is the thesis of this study to examine international tourists perception with regard to the basic and advanced touristic factor endowments.

Destination attributes are commonly used in empirical research to measure tourists' perception of a destination (Turner and Reisinger, 1999). According to Goeldner, Ritchie and McIntosh (2000), attraction, accommodation, and transportation are the three destination attributes against which international tourists make evaluation of the quality of experiences and the extent of satisfaction. It is against this background that this study sought: (1) To examine tourist perception of tourism attributes, and (2) To examine tourists' general satisfaction with Tanzania as a tourist destination.

Literature Review

Tourists' Perception of Destination

Tourism industry is very much affected with the perception the tourists carry with them about a destination. When international tourists carry positive perceptions about a destination, they will be encouraged to revisit the destination. Otherwise, they may be deterred from visiting and in encouraging others to visit. It is worth noting that tourists' evaluation of quality and satisfaction is based on this perception of an experience. Expectations-Confirmation Theory is commonly adopted in evaluating satisfaction in the tourism industry (Oliver, 1980). However, it posits that expectations coupled with perceived performance, leads to post-purchase satisfaction. The theory was used by Parasuraman and Zeithaml (1988) to develop a popularly and frequently used SERVQUAL instrument to measure perceived service quality. Given a plethora of flaws and criticisms leveled against the Expectations-Confirmation Theory, this study however adopts the perceived-performance model as advanced and maintained by Tse and Wilton (1988). Thus, they argued that satisfaction or lack of it can be assessed only by examining products/services actual performance and that regardless of previous expectations, customer is likely to be satisfied when a product or service was performed at a desired level. Supporting this view, Cronin and Taylor (1994) purport that expectations are left out of the evaluation of customer satisfaction as they are inherent in perceptions, do not need to be measured separately, and that customers are not conscious about them. Cronin and Taylor (1994) acknowledge that it is possible for researchers to infer consumers' disconfirmation through arithmetic means (the $P - E$ gap), but that "consumer perceptions not calculations, governs behavior". Churchill and Suprenant (1982) conclude that for some products with high credence attributes, perception was the only accurate measure of satisfaction. Therefore, tourism products fit well into the high credence bill.

Tanzania's Tourism Attributes

The World Economic Forum Competitiveness study (2011) named Tanzania second after Brazil, in terms of the richness of its natural resources. This is not surprising given Tanzania is located rightfully among the mega biodiversity rich countries globally. However, other countries are the Democratic Republic of Congo, Indonesia, and Brazil (Salazar, 2009). The country possesses unmatched wildlife populations and wilderness scenery, with around 30% of the country's total land area set aside in exclusive state-protected areas (Brockington, Sachedina, & Scholfield, 2008). Apart from these, Tanzania boasts of pristine Indian Ocean coastline that stretches for miles, and the world's highest freestanding peak of Mount Kilimanjaro. Besides its abundant wildlife resources, Tanzania is exceptionally endowed with cultural heritage resources offering a true cultural mosaic and diversity. Mabulla (1996) noted that Tanzania is one of the few countries in the world that is well-endowed in archaeological, palaeontological, and historical resources. Additionally, it has invariably been reported that Tanzanians are known to be warm, open, and friendly people, with a long tradition of generous hospitality and a wealth of folklore (MNRT, 1999).

Reliable, safe and a good value for money access to tourism attractions is extremely important. Researchers such as Gunn (1988) and Inskip (1991) among others have cited that the infrastructure base of a country is a potential determinant of the attractiveness of a destination. Tanzania is a geographically huge country with substantial distances between tourism destinations. Tanzania tourists' areas are rated to be less accessible than those of any other destination in East African region owing to weak air transport infrastructures, inadequate scheduled flights, and poor road networks. Poor transport facilities to and from tourists attractions have been noted to hinder a good proportion of elderly visitors who are a potential market segment as they have ample time for leisure and high disposable income (TISS, 2009).

Accommodation industry is one of the main sub-sectors in tourism activities. Majority of tourists who visit Tanzania have been complaining over sub-standard accommodation that does not reflect the value for their money (Sitts, 2009). Consistent with the development of tourism activities, most tourist hotels in Tanzania are located in Arusha, Dar es Salaam, Kilimanjaro, and Zanzibar. This implies that other tourist circuits are less developed with inadequate and sub-standard accommodation facilities. Virtually, all the large hotels in coastal areas are run by the international tourist industry and by Italian and South African companies in particular (Gössling, 2003). However, there are also hotels in both regions that are locally owned. According to the 2008 country's hotel inventory, Tanzania is a home of 339 hotels with combined 10,790 rooms.

Tanzania has suffered a fair share spate of terror attacks ranging from bombings in Arusha to acid and bomb attacks in Zanzibar. Therefore, these activities could make tourists to reconsider their travel plans. Equally frightening incidence to would-be-visitors to Tanzania are incidences of traffic carnages and outbreaks of epidemics and diseases. All of which have repercussions to the tourism industry. Perceptions of risk and safety are of paramount importance in the decision-making process of tourists since perceived risk whether exaggerated or realistic, have an impact on the tourist's intentions to travel (Bloemhoff, 2008). According to Buhalis and Costa (2006), even the slightest whispers of political discontent, diseases, and natural disasters, typically sends tourists arrival plummeting. Accentuating further the importance of security and safety, Richter and Waugh (1986) argue that “political serenity, not scenic or cultural attractions, constitutes the first and central requirement of tourism.” Despite all these, Tanzania remains a major destination for tourists. Also, many attributes Tanzania's relatively peaceful and stable political environment in comparison to its neighbors, leading to Hoefmeier (1997) terming it as “an oasis of peace.” Global Peace Index (GPI) of 2014 shows that Tanzania is the most peaceful country among East African Community member states, while it ranks sixth in Africa.

Standard of tour guiding services in Tanzania have received considerable criticism from all tour operators who felt the quality to be worse than in the competing destinations in all its aspects such as knowledge, ability to communicate, and attitude. Consequently, the delivery of quality products and services in the tourism industry is a reflection of the quality of its human capital base (Inyang & Esu, 2008). Likewise, Cooper, Fletcher, and Gilbert (1998) avers that “the challenges facing the tourism industry will only be met successfully by a well educated, well trained, bright, energetic, multilingual, and entrepreneurial workforce who understand the nature of tourism and have a professional training.” Investments in tour guiding knowledge, changing of attitudes, and proficiency in multiple languages, sits well with huge natural resource potential that the country possess. Consequently, the proficiency in multiple foreign languages is a basic assumption for successful communication in tourism (Božinović & Sindik, 2013). Besides, it is not only the knowledge of the grammar and vocabulary that one needs to master to do well in tourism, but awareness and appreciation of the importance of the socio-cultural aspects as well (Petrovska, 2010).

Research Methodology

This study was quantitative in nature and it utilized a survey of research design. A self-administered questionnaire was developed and used

to measure international tourists' perceptions with eight items of Tanzania destination. Also, the use of questionnaires is believed to get the most reliable responses (Hurst, 1994). The Eight (8) items were measured on a 5-point Likert Scale from 5= Strongly Agree to 1= Strongly Disagree. These items are culture, wildlife, landscape, accommodation, restaurants, security and safety, infrastructure, and tour guidance. A one item 5-point scale was used to examine respondents' level of satisfaction. The scale was from 1= Lowly Satisfied to 5=Highly Satisfied. Furthermore, the likelihood to recommend Tanzania to others was examined on a 5-point scale from 1=Not likely to 5=Most likely as adopted from Cronin et al., (2000) and Duman (2002). Demographic information such as Country of Residence, Age, Gender, Education, Average Monthly Income, Frequency of Visits, and Occupational Status were also measured. A survey was conducted from January to April 2013 in Zanzibar, Arusha, Iringa, Manyara, Kilimanjaro, Kigoma, Katavi, Tanga, Morogoro, Pwani, and Mbeya regions of Tanzania. Specifically, the survey covered 400 respondents. Three hundred and sixty five (365) questionnaires were collected from the field. After data cleaning, 286 questionnaires were found to be eligible for analysis. Data were analyzed using both descriptive statistics (Frequencies, Mean, and Standard Deviations) and Inferential Statistics (T-Tests).

Study Findings and Discussions

Profile of Respondents

A sample profile indicates that out of the 286 surveyed international tourists whose average age was 38.7 years, 50.5% were females. The finding indicates that the tourists are relatively highly educated with 47% and 36.2% having a university degree and a postgraduate degree respectively. Majority (41.2%) of the international tourists were earning less than 25,000 USD annually with most of them originating from Europe (64.3%), America (21.3%), Africa (5.9%), Asia (5.2%), Australia, and New Zealand(3.1).

Table 1: International Tourists Profile

Gender (n=285)	Frequency (N)	Percent (%)
Female	144	50.5
Male	141	49.5
Level of education(n=279)		
Non degree	47	16.8
Graduate degree	131	47.0
Postgraduate degree	101	36.2
Annual income in US\$(n=250)		
Less than \$25,000	103	41.2
\$25,000-\$49,000	72	28.8
\$50,000-\$99,000	49	19.6
\$100,000 and above	26	10.4
Nationality (n=286)		

	European	184	64.3
	Americas	61	21.3
	Asian	15	5.2
	Australia/New Zealand	9	3.1
	Africa	17	5.9
Age (n=281)	Minimum	Maximum	Mean (Std Dev.)
	13	75	38.73(15.919)

Tourist Satisfaction with Tourism Elements

International tourists who were surveyed and included in this study were moderately satisfied with their trip to Tanzania for virtually all aspects but three. The study revealed that the first three key tourist components tourists were highly satisfied with are landscape (Mean=4.10, SD=1.569), followed by wildlife (Mean=3.82, SD=1.818) and culture (Mean=3.55, SD=1.596). Landscapes are noted to have high potential as a leading tourist attraction, especially in Northern Tanzania which consists of the highest mountain in Africa: Mt. Kilimanjaro, Mt. Meru, Olduvai Gorge, and the Rift Valley. Critically, the tourists' components that tourists were satisfied with are those that a country does not do anything to bring them into being. Borrowing from Porter's Diamond, one would argue that Tanzania is endowed with basic factor conditions such as natural resources, climate, geographical location, and demographics. However, these require few or little investments. Furthermore, these findings are supported by WEF (2013) reports which revealed good performance in terms of human, cultural, and natural resources where they emerged 49 in the world followed by Kenya at 60, and Uganda at 79. The country is however constrained with advanced factor conditions (communication, infrastructure, skilled labour, and research facilities) which were created and upgraded through reinvestment. Porter (1990) argues that it is the second set of factor conditions which are the most significant for the competitive advantage of a country.

However, Tanzania fell in the infrastructure category emerging in the 125th position, while Kenya was ranked in 105th position (WEF, 2013). The WEF report findings are supported by these study findings in that specifically, tourists were not satisfied with infrastructure (e.g. transport, health care system, and sewerage), tour guidance, and restaurants. According to Okello and Yerian (2009) for majority of tourists who travel through tour operators, the quality of the individual's experience largely depends on the competency of the tour guide. Likewise, it is known that food constitute an important component of the international tourists. However, it is noted that in many African tourists destination, restaurants do not offer the kind of services that meet the expectations of the tourists. The shortcomings observed according to Mabunda (2004), are with regard to unattractive menus, improper presentation, lack of meals variety, unhygienic conditions,

interior decor, service, and ridiculously high prices. Furthermore, the sentiments were equally shared with an addition of filthy toilets and washrooms in the restaurants.

Safety and security are some of the aspects which are highly prioritized by the tourists when it comes to choosing a destination. However, in this study, tourists indicated that they were generally neither satisfied nor dissatisfied with Tanzania's safety and security with a Mean of 3.17. Thus, this makes it the fifth ranking element out of 8 tourism elements. Mansfeld and Pizam (2006) argued that so far, the literature dealing with these interrelations have identified four major types of security incidents that triggered some forms of negative impact on tourists. The four types in this context are "crime-related incidents, terrorism, war, and civil/political unrest" (Mansfeld and Pizam, 2006). Tourist gives high priority on safety and security issues during selection, thus making the question of adequate security by the tourists during their visit to be very important (Nurunnabi, 1995).

Tourists were generally satisfied with Tanzania as a destination with a Mean of 3.86 and the likelihood of them recommending the destination was high with a Mean of 4.01. Given that tourists rely heavily on non-commercial sources of information, such as recommendations from friends and family when choosing a holiday (Klenosky and Gitelson, 1998), these findings augurs well with the Tanzania drive to promote the sector as tourists with higher satisfaction are influential in generating positive word of mouth. As shown in table 2, the lowest value of the standard deviation is 1.38 and the highest value is 1.845. Therefore, this means that the values are not equally distributed, and therefore, the respondents differ in their responses. These results are however not surprising, as the different tourists were subject to different destinations in Tanzania from Zanzibar to Kigoma, and Arusha to Katavi.

Table 2: Tourist satisfaction with tourism elements and overall satisfaction

	N	Mean	Std. Deviation	Mean rank
Culture	275	3.55	1.596	3
Wildlife	277	3.82	1.818	2
Landscape	277	4.10	1.569	1
Accommodation	276	3.31	1.539	4
Restaurants	276	2.99	1.497	6
Security and Safety	276	3.17	1.544	5
Infrastructure	273	2.65	1.380	8
Tour guidance	270	2.98	1.845	7
Overall satisfaction	271	3.86	1.476	NA
Likely to recommend	274	4.01	1.508	NA

Tourists' General Satisfaction with Tanzania as a Destination

International tourists were asked to rate their level of satisfaction with Tanzania as a destination on a five point Likert scale from 1=Lowly Satisfied to 5=Highly Satisfied. The mean score of satisfaction was 3.86 with a standard deviation of 1.497. The descriptive measures show that the tourists were satisfied with the tourist products consumed in Tanzania. In addition, further analysis was conducted to confirm the findings. A one-sample t-test revealed the findings as indicated in table 3. The p-value < 0.05, conclude that the tourists satisfaction rating for Tanzania as a destination is greater than the test value of 3.

Table 3: Tourists' overall satisfaction with Tanzania as a destination

	Test Value = 3					
	t	df	Sig. (2-tailed)	Mean Difference	95% Confidence Interval Lower	Upper
Overall satisfaction with Tanzania	9.30	260	.000	.86	.68	1.04

Conclusion

Tanzania is doing relatively well on the basic factor endowments such as culture, wildlife, landscape, and accommodation facilities. The fact that the international tourists had favorable perception regarding some tourism attributes should not make government and other tourism stakeholders to be complacent. For instance, the government should ensure there are policies to guide the development of sustainable tourism. The concept of sustainability in tourism entails the maximization of benefits and the minimization of the negative consequences of festivals (Quinn, 2006; Henderson, 2011). Pomering et al. (2011) assert that a sustainable tourism should maximize and minimize the positive and negative effects of tourism respectively with respect to the tripartite of sustainability. The great international tourists concerns are on those advanced factor conditions (restaurants, infrastructure, tour guidance, security, and safety) which requires a lot of concerted efforts and investments to make them appeal to the international tourists and meet their expectations. As noted earlier, issues of insecurity are sometimes exaggerated and needs to be managed. The Western media has always been castigated for undermining the tourism industry in African continent through negative coverage and amplifying the negatives. This has been on going through over-emphasis on the coverage of Africa's conflicts and disasters, thus overshadowing its beauty, developmental projects, and its culture and tourism attractions. However, instead of allowing the western to tell the Tanzania story, Tanzanians should become champions in telling their story. Media houses are to be strengthened

and empowered so they do not perpetuate image of Tanzania which was created by the Western media.

Implications

By understanding international tourists' perception, tourism stakeholders and the government of Tanzania at large can derive several implications from the study findings. From a marketing managerial perspective, the findings should assist the tourism policy makers and practitioners to guide or develop tourists' products by addressing areas where Tanzania as a destination has proven to be weak, while improving further areas of strength which are basically the basic factor endowments. The researcher would wish to support Bashagi and Muchapondwa (2009)'s recommendations to improve international tourist satisfaction. Also, Tanzania would do well by training staff in the tourism industry such as tour guides and other service providers in the hospitality industry. In addition to basic technical training of tour guiding, tour guides need to master foreign languages such as English, French, Italian, Spanish, and even Chinese and become multilingual and multicultural individuals in a context of rapidly globalizing tourism customers. This is needed to be executed in collaboration with the private sector which is the key in propelling the fortunes of the industry ahead. Other areas that need further improvements are infrastructures such as road, airport facilities, toilets, water supply, electricity, and air conditioning facilities at airport terminals. These recommendations are however not new. It is thus being emphasized that the government and other stakeholders in the tourism industry should continue to improve infrastructure if they were to increase the number of international visitors, particularly the senior citizens who are more risk averse, with more disposable income and are inclined to stay long at destinations. These recommendations have repeatedly been expressed and made in various studies and the annual international visitors' exit survey reports conducted by Bank of Tanzania (BOT) and the National Bureau of Statistics (NBS) on behalf of the government. Therefore, there is an urgent need for all tourism actors to move from rhetoric to action.

Despite being informative, the study was limited to the utilized information acquired from international tourists. Hence, it limits comparative analyses with domestic tourists. Besides, future studies could benefit more by the qualitative approaches of collecting data which are known to generate illuminating and illustrative personal narratives, and uncover attitudes or ideas which could be potent in enriching quantitative data.

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