

Tourism in Tanzania: Serengeti National Park

Paul F. J. EAGLES
Derek WADE

Department of Recreation
and Leisure Studies
University of Waterloo
Waterloo
Ontario
Canada
N2L 3G1

A study of park visitors showed high satisfaction with the natural resources of the Serengeti National Park and with private-sector tourism operations. However, the visitors revealed negative service quality gaps for most services and facilities provided by the Tanzanian National Park Agency, TANAPA. While Tanzania seeks to cater for the higher end tourist, the study showed the importance of the budget tourism market to both the park and the nation.



Photo 1.
Serengeti National Park, Tanzania.
Photo P. F. J. Eagles.

RÉSUMÉ

TOURISME EN TANZANIE: LE PARC NATIONAL DE SERENGETI

Le tourisme axé sur la nature est un secteur de grande importance pour la Tanzanie, et le parc national de Serengeti y représente une attraction de premier plan. Le tourisme s'est considérablement accru en Tanzanie depuis une trentaine d'années, mais le pays perd actuellement des parts de marché en faveur de l'Afrique du Sud. Une enquête menée parmi les visiteurs fait état de niveaux de satisfaction élevés quant aux ressources naturelles du parc et aux opérations touristiques du secteur privé. Cependant, l'enquête a révélé des faiblesses sur le plan de la qualité des services fournis par la Tanapa, l'agence nationale des parcs de Tanzanie. Les effectifs chargés de la gestion du tourisme dans le parc sont faibles également, de même que le système d'information du public. La Tanzanie s'efforce de développer le tourisme de luxe et l'enquête a montré l'importance du budget touristique, autant pour le parc que pour le pays dans son ensemble. Cet article propose des recommandations pour améliorer la gestion du tourisme dans le parc national de Serengeti.

Mots-clés : gestion du tourisme, parc national de Serengeti, Tanzanie.

ABSTRACT

TOURISM IN TANZANIA: SERENGETI NATIONAL PARK

Serengeti National Park is the keystone attraction in Tanzania's important nature-based tourism industry. Tourism in Tanzania increased steadily over the last three decades, but the country has lost market share to South Africa. A study of park visitors showed high levels of satisfaction with the natural resources of the park and with private-sector tourism operations. However, the visitors revealed negative service quality gaps for most services and facilities provided by TANAPA, the Tanzanian National Park Agency. The park also had low levels of staffing in tourism management, and a poor visitor information system. While Tanzania seeks to cater for the higher end tourist, the study revealed the importance of the budget tourism market to both the park and the nation. This paper makes recommendations for the improvement of tourism management in Serengeti National Park.

Keywords: tourism management, Serengeti National Park, Tanzania.

RESUMEN

TURISMO EN TANZANIA: EL PARQUE NACIONAL DE SERENGETI

El turismo basado en la naturaleza es un sector de gran importancia para Tanzania, y el Parque Nacional de Serengeti constituye una atracción de primer orden. El turismo se ha incrementado considerablemente en Tanzania en los últimos treinta años, pero actualmente este país ve su cuota de mercado disminuir en favor de Sudáfrica. Una encuesta realizada entre los visitantes refleja un alto nivel de satisfacción en cuanto a los recursos naturales del parque y a las operaciones turísticas del sector privado. Sin embargo, la encuesta revela una serie de puntos débiles relativos a la calidad de los servicios prestados por la TANAPA, la Agencia Nacional de los Parques de Tanzania. Asimismo, no se cuenta con bastante personal para la gestión del turismo en el parque y el sistema de información al público. Tanzania intenta desarrollar el turismo de lujo y la encuesta puso de manifiesto la importancia del presupuesto turístico, tanto en el parque como en el conjunto del país. Este artículo propone recomendaciones para mejorar la gestión del turismo en el Parque Nacional de Serengeti.

Palabras clave: gestión del turismo, Parque Nacional de Serengeti, Tanzania.

Background

Tanzania's national parks and game reserves are well-known for their biological diversity. In recent decades, the growing nature tourism sector, which is based on this biodiversity, has become the country's largest foreign currency earner. This paper highlights the characteristics of tourists and tourism in one significant site, the world-famous Serengeti National Park (photograph 1).

Tanzania is one of the world's poorest nations, relying primarily on its agricultural sector (CIA, 2005). Tourism in Tanzania has great potential for economic growth. Over the last decade, the country recorded an average growth of 6% per annum in tourist revenue. In 1997, tourism contributed 15.8% to the GDP (US \$2,263 M), and 54% of the country's export earnings (US \$717.7 M). It also provided employment for 30 000 people (MELAMARI, 2001).

Tanzania seeks to offer a low-density, high-quality and high-priced tourism experience based on nature. Challenges include the lack of infrastructure, insufficient numbers of trained staff, and weak legal and regulatory frameworks (WADE *et al.*, 2001). Plans exist to diversify tourism products with the aim of increasing the length of stay and promoting the country as a destination in its own right. The National Tourism Policy for Tanzania (TANZANIA, 1997) is seeking: "the development of sustainable quality tourism which is culturally and socially responsible, ecologically friendly, environmentally sustainable and economically viable, and to market Tanzania as the destination for tourism in terms of adventure, safari, wildlife, a variety of cultures and beaches".

Visits to the national parks in Tanzania have increased considerably from 132 879 visitor days in 1987 to 318 419 in 2000 (figure 1). Park tourism has grown faster than national tourism, revealing the relative importance of the national parks to the tourism industry. However, from 1980 to 2000, Tanzania lost

market share to South Africa in the expanding African tourism market.

Serengeti National Park is the largest park in the Tanzania national park system, covering an area of 14 763 square kilometers (figure 2). It is a World Heritage Site, and a Biosphere Reserve. The Serengeti ecosystem is perhaps best known for the continuous migration of over 1.4 million wildebeest, 0.2 million zebra and 0.7 million Thompson's gazelles. The ecosystem contains one of the highest concentrations of carnivores in Africa. The park is also home to the endangered black rhinoceros and African wild dog (TANAPA, 1996; KIDEGHESHO *et al.*, 2005).

The Tanzanian National Park Agency, TANAPA, a government-operated parastatal, manages Tanzania's national parks. All operational funds for the national park system come from tourism fees and charges. Foreign aid grants provide most of the capital funding. Tanzania's national parks have a differential system of entrance fees: in 1996 non-residents paid US \$20 per person per day, while national residents paid 1 500 Tshs, or approximately US \$1.00. In the same period, Serengeti National Park contributed approximately 33% of all income earned by the national park system (MELAMARI, 1996). All park employees and the vast majority of employees in private-sector tourism companies are

Tanzanian nationals. Therefore, park tourism is a major source of employment in the local and national economy. TANAPA is governed by a Board of Directors appointed by the national government.

In 1996, Serengeti National Park had 105 000 visitor days, more than any other park in the country (MELAMARI, 1996). Tourist facilities in the Serengeti include four lodges and four tent camps operated by private tourism companies, and two campsites operated by TANAPA (2001). Access is usually through the Naabi Hill Gate (photograph 2) on the road from the Ngorongoro Conservation Area to the east.

The park agency provides resource management, public campsites, roads and security. In 1997, the park tourism department consisted of only one tourist ranger. The private sector offers the majority of tourism services through tourist lodges providing accommodation and food, and safari companies providing transport, guides and special campsites. These private-sector companies pay a fee to TANAPA.

The strong tourism industry is the main reason why the national park has continued to exist and flourish. Income from tourism is an incentive for the national government to invest heavily in park management.

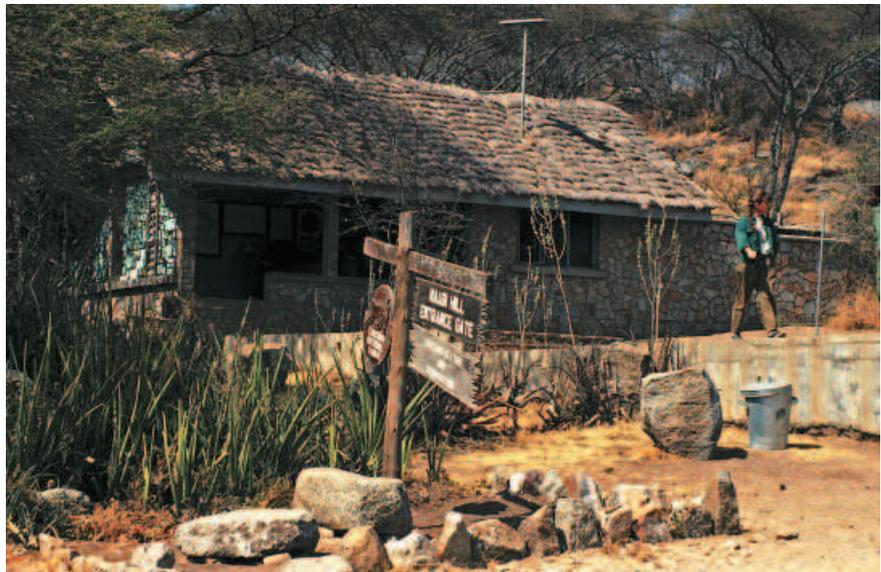


Photo 2.
Naabi Hill Gate. Serengeti National Park, Tanzania.
Photo P. F. J. Eagles.

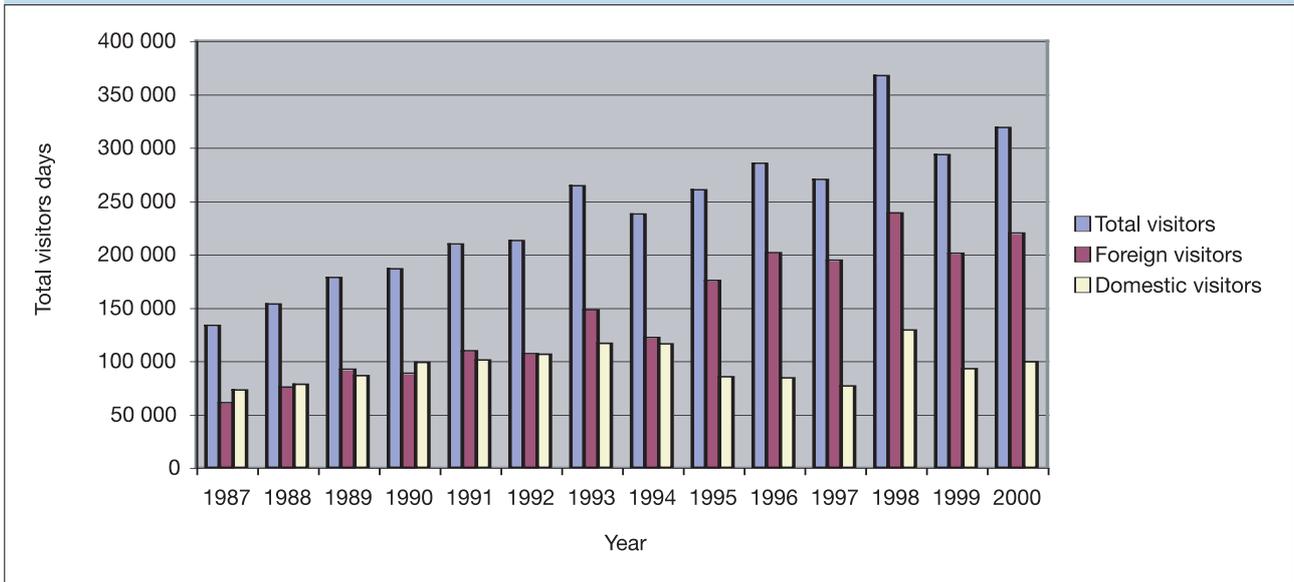


Figure 1.
National park visitor use in Tanzania.

Serengeti National Park visitor study - background

Approximately 1 000 tourists entered Serengeti National Park over a six-day sampling period during the low visitor season of October 1997. A total of 228 tourists completed a complex survey on the last night of their stay, with a 98% response rate.

Almost half of the visitors were from the UK and the USA. Much smaller numbers were from The Netherlands, France, Australia, and Germany. Tanzanian citizens accounted for just 0.9% of this sample. All groups of Serengeti tourists are highly educated. The gender mix among visitors is approximately equal.

The average length of visitor safaris is 17 days (table I). These visitors spend 40% of their time (7 days) inside national parks and 60% outside. In the low season, visitors stay in Serengeti national park for only 2.3 days on average. This is a short stay considering the global significance of the park and the long journey needed to get there.



Figure 2.
Serengeti National Park. Source: @ 2004 Serengeti National Park.

Repeat visitors to Serengeti NP represent only 6.3% of the sample. Half of the repeat visitor respondents were tour leaders, and one quarter were residents. The repeat visit rate is therefore very low.

Wildlife-related activities were mentioned by 75.2% of respondents as being the most enjoyable aspect of their park visit. Wilderness and scenery was cited by 15% of respondents.

User segments

Four clearly identifiable user segments, each with specific characteristics, were found at the park. Lodge safari visitors made up the largest group, with 59% of respondents. Lodge safari visitors travel through the park by private safari vehicles and stay in one of the private-sector lodges in the park. Camping safari visitors (18% of respondents) travel through the park with safari vehicles and stay in one of the campsites operated by TANAPA. Overland safari visitors (19% of respondents) travel in large groups in large trucks and stay in public campsites. They typically travel through several countries in eastern and southern Africa. Special campers (4% of respondents) travel in small groups and stay in exclusive, privately-operated campsites.

Overland and camping safari visitors are single, younger, childless, and just establishing their careers. Special campers and lodge safari users are married with older children and in mid-career.

There are significant differences among the user segments with regard to income. The camping and overland safari visitors have a household income of less than US \$25 000 per annum. Conversely, lodge safari respondents and special campers often stated an annual household income of US \$150 000 and above (photograph 3).

The overland and camping safari tourists are part of a budget safari market, while lodge and special camping tourists make up a luxury safari market. Since Tanzania is aiming for a high quality, high-priced tourism product, it is important to note that many budget tourists also use the national parks and stay in the public campsites. It must also be noted that TANAPA receives more in revenue from an individual staying in a campsite than from an individual staying at a lodge.

The mean group size in the sample was approximately 12 individuals (table I), with significant differences

Table I.
Safari length and group size by user segment.

Segment	Mean safari length in days	Mean days in national parks	Mean days in Serengeti NP	Mean group size
Overland safari	38.8*	4.6*	2.0	20.3*
Camping safari	9.3	5.8	2.1	6.0*
Lodge safari	10.6	7.5	2.5	11.0*
Special campers	10.3	8.4	2.9**	5.6*
Total sample	16.6	6.6	2.3	11.7

*Difference significant according to ANOVA results.
**Significant difference between special campers and overland and camping safari (ANOVA).

Table II. Service quality gaps in Serengeti National Park.

Service quality variable	Service quality gap (mean importance minus mean performance)
Washrooms	-1.29*
Quality of roads	-1.10*
Availability of information	-0.99*
Security from theft	-0.82*
Visitor centre	-0.46*
Low level of crowdedness	-0.41*
Knowledge of guide	-0.25*
Group harmony	-0.13
Friendliness of TANAPA staff	-0.13
Attractiveness of park	-0.09
Security from wildlife attack	-0.08
Friendliness of guide	-0.08
Accommodation chosen	+0.01
Good weather	+0.54*

*Statistically significant difference amongst segments according to paired sample t-tests.

between user segments. Overland tourists make up the largest groups, with an average of 20 people per group. Lodge safari groups have an average of 11 people. Special campers and camping safari visitors come in much smaller groups of around 6 people. Both special campers and camping safari visitors pay more for an intimate social experience.

The vast majority (96%) of the sample arrived at the park as part of an organized safari. About 90% of all

safaris were organized outside Tanzania. Foreign tourists said they preferred the security of dealing with their home travel companies. However, about half (47.7%) of the camping safari users purchased their safari in Tanzania, a significantly higher proportion than in the other user segments. These users stay longer in Tanzania and therefore have a greater economic impact.



Photo 3.
Sopa Lodge. Serengeti National Park, Tanzania.
Photo P. F. J. Eagles.

Service quality ratings

Service quality measurement is an important element of tourism management (WADE, EAGLES, 2003). Table II shows the service quality gaps, i.e., the differences between importance and performance, for the Serengeti. Negative numbers followed by an asterisk indicate a service problem.

There are many significant negative service quality gaps. The quality of washrooms and roads, availability of information, security from theft, the visitor centre, absence of overcrowding and the level of knowledge of the guide are all rated much lower for performance than for importance. All these aspects of service quality must be improved if TANAPA is to offer a high-quality, high-priced tourism product. Good weather, a natural dimension of service quality, is the only significant positive gap.

Users of special campsites and lodges were satisfied with their accommodation, but public campers

were not satisfied with campsite services. Over one quarter of respondents mentioned problems with the campsites, such as poor campsite quality, bad toilets and litter. All the problems were in the campsites managed by TANAPA. The authors found the TANAPA-managed campsites to have atrocious toilet facilities, abundant populations of the biting Tsetse fly, and lions roaming in the campsite at night and attacking tents. TANAPA has a major problem with service quality and safety in these campsites (photograph 4).

This service quality problem is particularly relevant since TANAPA (2005) massively increased its use fees on January 1, 2006 to US \$50 per day for adults and US \$10 per day for children from 5 to 16. This fee structure makes the Serengeti National Park one of the most expensive park destinations in the world.

The overall mean rating of the park came to 1.77, with 90.4% of respondents rating the park as excellent or above average. This suggests a high overall level of visitor satisfaction with the park.

Park tourism data management

TEAR and LOIBOOKI (1996) found that the park had few staff dedicated to tourism management and an unsophisticated tourism information system. TEAR (1997) noted a lack of interest from the agency in tourism management and monitoring. Analysis showed that the statistics for Serengeti may be understated by as much as 30% due to clerical error and staff fraud (SCDP, 1997). Common clerical errors included:

- The number of vehicles and the number of vehicle days listed as identical.
- Inaccurate figures on nationality.
- Inconsistency between gate offices in data collection procedures.

MELAMARI (1996) reported that Tanzanian residents accounted for 56% of visitors to the Serengeti in 1995. However, our study found that in 1997, 0.9% of visitors were residents while TEAR and LOIBOOKI (1996) found 0.5% were residents. Why this large discrepancy? It is possible that the official figures include park entrants, people who transit through the park but are not visitors. However, a more insidious possibility exists. In our work at another park, we found that some of the gate attendants charged visitors the high foreigner fee, but recorded the visitors as national citizens who paid the much lower fee. Presumably, the park gate staff members pocketed the difference. Clearly there is a need for a major upgrading of financial and visitor management procedures in this park.

This research shows an inefficient and ineffective tourism data management system in Serengeti National Park.



Photo 4.
Tanzanian National Park Agency campsites. Serengeti National Park, Tanzania.
Photo P. F. J. Eagles.

Implications

Visitors to Serengeti National Park arrive as part of a once-in-a-lifetime experience and are satisfied with the wildlife and ecological features of the park. Over 90% of respondents to this survey gave the park an overall rating of “excellent” or “above average”. Visitors who had visited Kenyan parks rated Serengeti as superior in terms of crowding levels, sense of tranquility, variety of wildlife, and overall.

Regarding the private-sector services offered in the park, visitors rated the knowledge and friendliness of their guides as high, although there was a service quality gap concerning their knowledge. Visitors who stayed at a lodge or in one of the luxury tent facilities in the special campsites were also satisfied with their accommodation. The private-sector providers within the park offer good quality service to park visitors.

There are many negative service quality gaps for services operated by TANAPA. Importantly, many park services are ranked lower than those offered in the protected areas of

Kenya and South Africa. Overland campers, who travel through several African countries, were especially displeased with hygiene issues, rating the washrooms as very poor. This suggests that park services are well below the standards of other African nations. This is especially relevant considering that Tanzania wishes to position itself as a low-density, high-priced and high service quality destination, and national parks, which have seen recent large increases in fees, are a major part of this sector.

TANAPA has an opportunity to move towards improving services and updating their tourism goals. Clearly, the budget tourism segments have the potential to make a significant impact on the local economies of Serengeti and the entire country – in particular through camping safari users who organize their safari in Tanzania and stay longer in the country. While national policy is focusing on the high-end segment, TANAPA needs to diversify and place a higher priority on this all-important budget segment.

Serengeti National Park has natural resources that compare very well in the park tourism market (photo-

graph 5). However, the national park has severe service quality problems with park-operated services. There is potential for higher levels of economic impact with better financial tracking and planning. The park has two possible routes for tourism management. All tourism services could be turned over to the private sector, which has a proven record of high service quality. Or TANAPA could upgrade its own service delivery programs. The park needs an upgraded tourism information system, with sufficient numbers of trained staff, modern computer facilities, and a professional monitoring program. Action in these areas will help Tanzania gain market share in park tourism in Africa.

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Photo 5.
Lion. Serengeti National Park, Tanzania.
Photo P. F. J. Eagles.