

Training needs assessment for tourism businesses in Tanzania

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ABSTRACT

There is clear evidence of the skill gaps between the skills offered in training institutions and the skills required by the tourism market in Tanzania. This paper intends to assess training needs among tourism businesses in the country. The study employed a qualitative method in which Focus Group Discussions (FGDs) and Key Informant Interviews were conducted among MSMEs in the tourism industry in Tanzania. It involved a total of 117 respondents (63 females and 54 males), with the majority being tourism businesses. The study revealed that tourism businesses have varying levels of basic education, as well as specific tourism education levels. The MSMEs lack different skills and competencies, due in part to their lines of business, the levels of involvement with their business, and customer transactions. There is a need to move towards a more professional tourism business development approach and practice. This can best be achieved when a greater number of tourism MSMEs in the eight tourism sub-sectors from the five circuits work more closely together in formal location-based, cross-sub-sector circuits to gain leverage on their synergies. Also, there is a need to identify tourism skills gaps and propose mitigation measures for capacity-building training initiatives that focus on tourism business development to make Tanzania destination more competitive.

1. INTRODUCTION

Internationally, the tourism sector is one of the key sectors that contribute to the economy at the national and global levels (Kartika, Nugroho, & Oktavio, 2019). The tourism sector contributes almost 10% of global GDP (UNWTO, 2020), while in Tanzania, its contribution stands at 17.6% of GDP, 25% of foreign exchange, 10% of total investments, and 1.5m jobs (MNRT, 2020). Despite the COVID-19 pandemic which severely affected the tourism industry in Tanzania, domestic tourism grew by 20.4 percent from 562,549 visitors in

2020 to 788,933 in 2021 with revenue increasing by 27.6 percent from TSh 9.7 billion in 2020 to TSh 12.4 billion in 2021. Conversely, inbound tourism increased by 48.6 percent from 620,867 tourists in 2020 to 922,692 in 2021 with revenue increasing by 76 percent from US \$ 714.59 million in 2020 to US \$ 1,254.4 million in 2021 (MNRT, 2022).

The tourism industry in Tanzania is still recovering from the impacts caused by COVID-19 pandemic. To improve the current trajectory of growth and recovery of the tourism industry, there is a need to improve the quality of products and services offered to visitors. This is because increasingly, visitors are complicated and seek products and services that go beyond satisfaction (Bhebhe, 2020; Francis, Wamathai, Wandaka, & Jilo, 2020). This puts staff in the tourism businesses at the center of brand and key determinants of other performance indicators such as service quality, competitive advantage and organizational performance (Rahimić, Črnjar, & Čikeš, 2019; Sh & Turaeva, 2020; Wang, Dagvadorj, & Kim, 2021). As a result, talent management and development play an important strategic and operational role in the success of a tourism business (Hole & Snehal, 2019; Pelit & Katircioglu, 2021; Tiago, Borges-Tiago, & Couto, 2020).

According to the World Bank (2021), the priorities for strategic recovery for Tanzania's tourism industry, include creating an efficient, reliable and transparent business environment, improving the tourism information management system, and ensuring affordable financial support to struggling businesses across the value chain. Other priorities for the sector include strengthening adherence to health and safety protocols and data transparency and supporting nature-based landscape and seascapes management through the development of co-investment and partnership arrangements (Cardoso, 2020; Sharma, Thomas, & Paul, 2021; Tourism, 2020).

Several scholars such as Bakari (2021) have studied the challenges facing the tourism industry in Tanzania. In his study, he noted that even though Tanzania is one of the countries with vast and unique tourist attractions in the world, it receives very few tourists yearly compared to other peer African countries which do not have as many attractions as

Tanzania. Conversely, Tanzania destination is endowed with unique world heritage sites, but unfortunately, these attractions are not that popular among the population in the country and outside the country due to a lack of coordination among tourism stakeholders (Bakari, 2021).

Training is a key requirement for tourism businesses to cope with emerging trends and changing paradigms at the country, and global level (Tiago et al., 2020; Tripathi, Srivastava, Singh, Kapoor, & Solanki, 2021). World-wide, globalization coupled with increasing international competition has necessitated the human element to provide quality products and services as a competitive advantage (Emmanuel, Dato'Mansor, MohD Rasdi, & Abdullah, 2020; Načinović Braje, Pavić, & Ferjanić Hodak, 2020). Given that, existing trends demand that the tourism sector's staff possess additional skills and competencies that fill the skills gaps in the market (Teja & Oktavio, 2019).

Most scholars have focused on tourism training concerning industry requirements in terms of skills and competencies required. Ministry of Education and Vocational Training (MoEVT) (2015), discovered that a gap exists between the skills acquired by trainees and the skills required by the industry. Despite this, little attention has been paid to the skills gaps and industry needs in Tanzania. To make Tanzania destination more competitive, this manuscript acts as an early morning call for the urgent need of filling the existing gaps between the skills acquired by trainees and the skills required by the tourism industry.

In Tanzania, there have been attempts to train tourism MSMEs to reduce the existing skills gaps and industry needs but the impact has been so minimal. For instance, the Tourism Confederation of Tanzania (TCT) has been providing several training courses in advocacy, and communication and continues to organize training programs to benefit its members in their pursuit to meet their objectives, but yet due to the magnitude of training needs in the industry, the efforts have not brought about the desired results (Pers.com, Executive Secretary for TCT). The main objective of this study is to assess the Training Needs Assessment (TNA) for tourism businesses, especially tourism MSMEs to raise the concern to the tourism stakeholders in Tanzania.

2. LITERATURE REVIEW

Characteristics of the Tourism Industry

Unlike any other industry, Tourism is a service industry since it has all the most unique features of the service industry, which include perishability, inconsistency, investment and immobility, people-oriented, inseparability, intangibility, inflexibility, and imitability (Betts, 2020; Tiago et al., 2020; TULSI & JI, 2020). Generally, the things which can neither be touched nor felt are referred to as tangible products. Intangible things are those items such as consumer goods and products which cannot be seen, tasted, or touched but can only be felt and experienced during consumption. On the other hand, the product and service cannot be separated from their service provider. Conversely, things like fruits, meat, fish, vegetables, and milk are perishable products as they have a short half-life. Likewise, tourism is also perishable since every tourism product has a limited time to experience. Vice versa, a tourism product is heterogeneous as there are lots of human factors that are considered in the delivery of the tourism service and it cannot guarantee that each visitor's experience will be the same.

In Tourism products and services, there is always a human factor attached accordingly, some experiences will be fine and others will be just superb. Lack of belonging is a common feature of the tourism product and service sector. Furthermore, Tourism is a seasonal business, implying that there is no single destination famous all year round. In a tourism value chain, the interdependency of products and services is a common characteristic. It is important to note that, in tourism operations, players ought to be aware of risks and uncertainty (Betts, 2020; Tiago et al., 2020; TULSI & JI, 2020).

Training Needs Assessment in the Tourism Industry

Tourism like any other service industry is a human resource-oriented industry. Most scholars have studied on role of training in the tourism industry. Accordingly, the tourism industry relies heavily on institutional trained staff in providing quality service to meet the

needs and expectations of customers (Betts, 2020; Ghasemi, Nejad, & Aghaei, 2021; Tiago et al., 2020; TULSI & JI, 2020). It has been observed that well-trained tourism operators have a profound influence on consumers' perception and satisfaction with the product and services. In the long run, this enhances business performance and growth (Balmer, 2022; Giertz, Hollebeek, Weiger, & Hammerschmidt, 2022). Conversely, it was observed that staff in the tourism sector are key determinants of the variables such as service quality, customer satisfaction and loyalty, competitive advantage and organizational performance (Abdiyev & Alimardonov, 2022; Kalla; Wang, Ban, Joung, & Kim, 2022). Also, it was found that the quality of human resources plays a crucial role in determining the quality, delivery, efficiency, and satisfaction of services offered (Marneros, Papageorgiou, & Efstathiades, 2022).

Furthermore, it was observed that world-wide, the ability of human resources to deliver quality services is a major source of competitive advantage (Batat, 2022; Charusalaipong, 2022). In addition, it has been discovered that the most vital assets or valuable resources in any tourism business are people because they determine the success or failure of an industry (da Silva et al., 2022; Wood & Bischoff, 2022). Given the ongoing trend of globalization and competition, the need for highly trained operators in the tourism sector especially the frontline operators cannot wait any further in emerging destinations such as Tanzania (Bao, Ma, La, Xu, & Huang, 2022; Lugosi & Ndiuini, 2022).

Despite the shortage of the needed skills in the market, tourism businesses are continuously looking for a wide range of skills and competencies among tourism and hospitality graduates to keep their competitive advantage for businesses (Bukhari, Jain, Akhtar, & Wani, 2022; Busulwa, Pickering, & Mao, 2022). Unfortunately, such skills which match the skills needs in the market are difficult to find among the tourism and hospitality graduates in Tanzania. Thus, the tourism industry should enhance human resources development to improve business performance and service quality to enhance long-term business competitiveness (Sousa, Monteiro, & Machado, 2022; Tesone, 2004; Widjaja, Chavez, Tayko, & Preudhikulpradab, 2020).

To improve the quality of the products and services delivery in the tourism industry, employees must be adequately trained to ensure high levels of professional competency. Such training is required to ensure that skills mismatch is minimized. This is important because trained staff are crucial to the competitiveness of tourism businesses and would reduce employee turnover costs. To achieve this, there is a need for proper coordination of the design and development of tourism training programs at all levels, particularly among MSMEs in Tanzania.

Furthermore, it was observed that tourism operators seek a combination of attributes, skills, and experiences with interrelated elements, both informal and structured (Babalola, 2019; van Rensburg, 2021). They further noted that some operators in the industry would prefer conducting in-house and on-job training as opposed to sending their staff to training institutions. The challenge for such a preferred human resources development strategy is that the tourism operators end up being overwhelmed with the training at the expense of their core business activities (Anvari & Jamali, 2020; Gathoni, 2019; Kamau & Waudo, 2012). On the same note, it was postulated that the service industry is faced with continuous challenges ranging from employees incompetence, especially at the managerial level, which may result from a lack of employees motivation hence they are not committed to their work (Anvari & Jamali, 2020; Kumar & Chansoria, 2021).

Other factors leading to a lack of employee commitment and high turnover rates in the industry include poor working conditions which show their talent is not fully recognized and appreciated by their respective employers. The main human resource areas of concern affecting the industry include the poor image of the tourism industry, rewards and benefits, working conditions and hours, availability of skilled staff and education (MoEVT, 2015).

However, some scholars including Kamau & Waudo (2012) observed that some tour operators are not even aware of the importance of some specific skills in the industry. This study highlights the important role played by staff in the tourism industry as they portray the image of the business.

Theoretical Model

The study adopted the conceptualization of the training needs assessment for the tourism businesses in Tanzania. It is a model that suggests visitors require different services at different points in the “Visitor Journey” (Araújo, 2021; Lane, 2007; Nguza-Mduba, 2020; Tropmann-Frick, 2021). The Visitor Journey framework is an important tool in addressing elements of capacity along the Visitor Journey chain. TNA used the Visitor Journey Model as a framework for conducting a closer link between the visitor journey phases and the training needs required by the tourism businesses to create a visitor experience that assures increased tourist revenues through longer visitor stays, increased repeat visits and stronger spending at the tourism businesses.

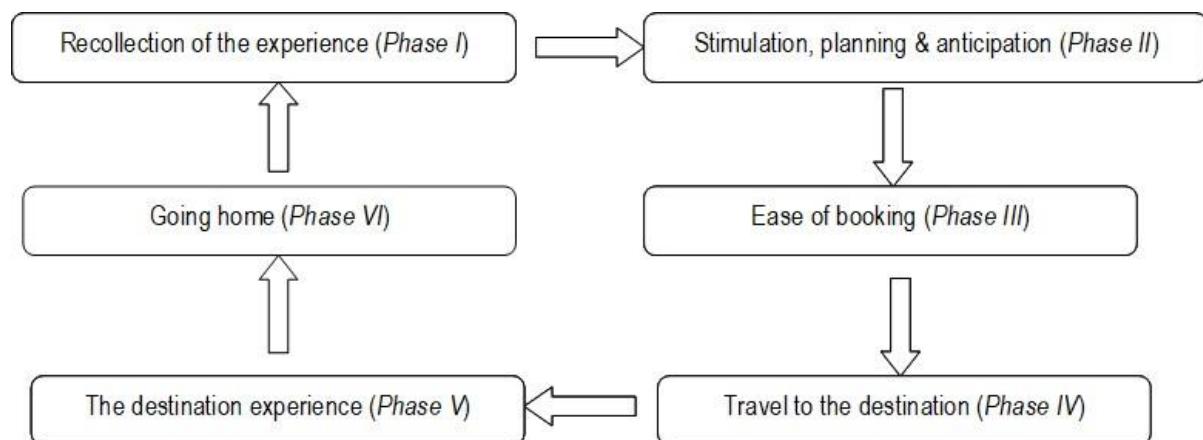


Figure 1. The Six Phases of the Visitor's Journey Model
 Source: Araújo (2021); Doka (2017); & Lane (2007)

The Model (Figure 1) suggests that tourists with specific access requirements can experience difficulties at any point in their journey, from the earliest planning stage (gathering and sifting through information) to booking, travelling (in various modes of transport), finding accommodation, when visiting attractions and cultural venues, in restaurants and cafes, when shopping, attending a business meeting or conference, passing through urban areas or natural landscapes and returning safely back home again (Araújo, 2021; Doka, 2017; Lane, 2007). It is therefore evident that everyone who has a service role at any part of the “visitor journey” must be equipped, to some degree, with knowledge, skills,

and competencies to assist and accommodate the tourists and visitors, showing good customer service, attention, respect, and support, as and when required. Furthermore, best practice tourism MSMEs are concerned not only with short-term business survival but also with winning returns on their investment to achieve business viability and sustainability (Araújo, 2021; Doka, 2017; Lane, 2007). To be successful, therefore, tourism MSMEs also need to develop strategies and long-term plans to grow their business offering and remain competitive in the market.

In this study, the researcher undertook a knowledge and skills gap analysis to generate training needs among eight tourism subsectors, with special attention to tourism MSMEs in the northern, southern, eastern, and southern tourism circuits of Tanzania covering the mainland and the Island of Zanzibar. The 'gap analysis' procedure provided qualitative data involving individual tourism MSMEs, the Ministry of Natural Resources and Tourism (MNRT) and Ministerial Departments and Agencies (MDAs), and other tourism stakeholders across Tanzania.

3. METHODOLOGY

The study adopted the qualitative method, whereby Focus Group Discussions (FGDs) were conducted among MSMEs in the tourism industry in Tanzania. Also, the study employed Key Informant Interviews (KIs) among top executives of tourism organizations such as the Tourism Confederation of Tanzania (TCT); Tanzania Association of Tour Operators (TATO); Tanzania Society of Travel (TASOTA); Tanzania Air Operator Association (TAOA); Hotels Association of Tanzania (HAT); Tanzania Hunting Operators Association (THOA); Tanzania Professional Hunters Association (TPHA); Tanzania Tours Guides Association (TTGA); Zanzibar Association of Tourism Investors (ZATI); and Tanzania Association of Cultural Tourism Organizers (TACTO). Also, KIs were conducted on the officers of the main conservation agencies in the country including Tanzania National Parks (TANAPA), Tanzania Wildlife Authority (TAWA), Tanzania Forestry Services (TFS),

and Ngorongoro Conservation Area Authority (NCAA). In addition, KIIs involved some members from the academic and research institutions that are providing tourism and hospitality education in Tanzania. The determination and selection of the participants and respondents were based on relation to what they referred to as the 'information power' that a given sample holds as adopted from Malterud, Siersma, & Guassora (2016).

The study was conducted in Tanzania's three tourism circuits, including the Northern Tourism Circuit, Coastal Tourism Circuit and Zanzibar Tourism Circuit. The tourism circuits were selected based on their tourism importance in Tanzania (Batinoluho, 2017; Anderson, et al., 2017). The sample of 117 respondents that participated in the study was randomly drawn from the sample frame (117 formalized tourism businesses) created from the list of tourism stakeholders in the study area, which includes Northern Tourism Circuit, Coastal Tourism Circuit, and Zanzibar Tourism Circuit in Tanzania. According to Kothari (2004), at least 10 percent of the population is a representative sample, thus 117 respondents equal to 10 percent were considered as an appropriate sample in this study. However, the principle of saturation was not ignored. The research design was preferred following several attempts for capacity-building initiatives which were intended for bridging the skills gaps between the classroom and tourism industry in the country without success. The approach aimed to borrow lessons learnt from the previous initiatives to avoid failures in future attempts. The respondents comprised 2 senior tourism officers at MNRT; Executive Secretary for the Tourism Confederation of Tanzania; Chairman and Executive Secretary for the Tanzania Tour Operators; 99 Individual Tourism Businesses (accommodation owners, tour guides, tour operators, cultural tourism operators, art and crafters, food and drinks providers, spas operators, recreational facilities owners, events and meetings organizers, aviation operators, transporters, etc.); 6 members from the research and academic institutions; and 4 members from the law enforcement institutions.

Data collection included reviewing the existing tourism and hospitality, and MSMEs documentation, physical and social mapping of MSMEs, in-depth interviews with key

informants, Focus Groups Discussions (FGDs) as well as field observation techniques. The data collection was done using the following tools; a checklist of guiding questions to guide Focus Group Discussions (FGDs) and in-depth interviews, and a field data collection schedule. The data gathered were processed and analyzed qualitatively; whereby the data were first translated and categorized into various themes and sub-themes based on the study objectives in both FGDs and KIIs guides. Then, the analysis was carried out by using a combination of conventional content analysis, direct content analysis and summative content analysis. Qualitative content analysis (QCA) is one of the current most widely used analytical methods, which is successful and applicable in several types of research (Selvi, 2019; Thomann, Ege, & Paustyan, 2022; Van Burg, Cornelissen, Stam, & Jack, 2022). It enables understanding of the social realm or processes through interpretation of the reality of verbal or written recorded respondents' information. The method allows the researcher to process large quantities of data obtained from a large sample as is the case in this study. The study findings are presented in the next section.

4. RESULTS AND DISCUSSION

Respondents' Data Disaggregated by Gender and Age

The study involved a total of 117 respondents, of which 63 (54%) were female and 54 (46%) were male, evidence of there being slightly more females in tourism businesses than males (Figure 2). When looking at age groups, those aged 35-59 constituted 58% of the total, the age group 18-34 constituted 25% and those aged over 60 years old constituted just 17% (Figure 3). This implies that the majority of tourism business operators are middle-aged (35-59 years old) with lower numbers of either young or elderly people. This middle-aged group would seem to be a potential group for a tourism training and capacity-building program in the country. Also, the survey shows that younger respondents (25%) are potential tourism entrepreneurs, and there is, therefore, a need to invest in their development for future tourism business transformation in Tanzania. The average age for

both male and female respondents was about 45, which generally reflects an active age in human development, particularly in business operations.

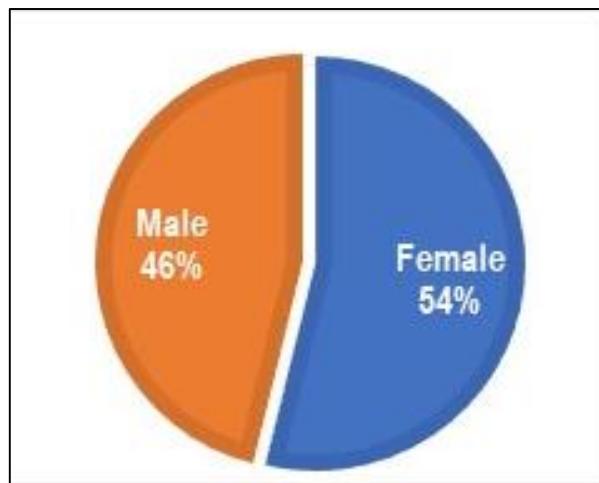


Figure 2. Respondents Disaggregated by Gender

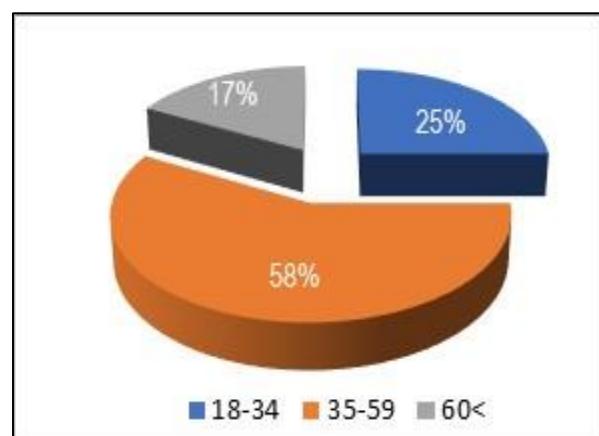


Figure 3: Age Group of Respondents

Respondents by Tourism Circuits

Knowledge, skills, and competencies required by tourism MSMEs to carry out each visitor journey phase task challenge effectively.

It is evident from the study that most tourism MSMEs lack exposure to ICT knowledge which has resulted in limited use and investment in online platforms to ease booking for tourists. A weak understanding of the role of ICT in reaching out to tourists is also quite evident from the survey. The weak focus on leisure tourism among tourism

MSMEs overall is largely a result of their limited exposure to tourism, and specifically to tourism development. As a result of this, most tourism MSMEs have a limited understanding of tourist consumer behavior, such as referring to online reviews, online photographs, online product promotions, and prices that engage tourists.

The general lack of professional investors in tourism among the tourism MSMEs sub-sector in most of the districts visited means that foreigners, especially those from neighboring South Africa, are more proficient than local nationals in attracting both domestic and international tourists. The widespread notion that foreigners prefer to use foreign-owned businesses is largely false, but there is a wide gap in professional standards between local tourism MSMEs and foreign-owned tourism businesses when attracting guests.

The study showed that these capabilities were mainly prominent among tour operators and travel agents but were generally lacking among the respondents working in traditional accommodation, tour guiding, and arts and crafts. The survey also revealed that most of these capabilities are found in leisure-related tourism businesses, but rather limited to accommodation and arts and crafts tourism MSMEs respondents as they lacked awareness of tourism as a discipline. The systematic exposure of tourism MSMEs to the tourism discipline and tourism business management, based on the Visitor Journey Model, should help change perceptions and understanding so that more tourism MSMEs get involved in tourism business management, and help contribute to the Tanzania Tourism Master Plan goals and ambitions.

The study found that tourism MSMEs businesses do often pay attention to business principles in managing their businesses but there were often clear gaps in ensuring that their businesses were tourism-centric. For example, service innovations and experience creation for tourists including services at Spas gyms and fitness centers, for curio products, taxi services, water, game or village safaris are generally not available in most tourism MSMEs businesses, especially in the accommodation sub-sector. The tourism MSMEs also link up synergistically with relevant sub-sectors, due to a general lack of business associations or

networks. The survey also found that the staff are often untrained or poorly trained to be able to manage tourist needs, especially leisure tourists. This limits the tourist experiences, and it can be a disincentive in leisure and adventure tourism denying tourism MSMEs any repeat visits to their businesses. The survey found that most of these tourism-centric capabilities are found in leisure-related tourism businesses, such as game and water safari, where most tourism MSMEs are not involved.

The survey found that some tourism MSMEs businesses conduct verbal and written feedback surveys when their visitors exit Tanzania. However, most of the findings are poorly managed for analysis, while results are often not used to improve facilities and services. This often reflects a lack of customer orientation in their tourism businesses, implying such activities are done out of convenience, rather than as a necessity. This is a disincentive for planning and achieving tourism-centric business objectives.

The survey found limited efforts among those tourism MSMEs interviewed in building social media advocacy and brand loyalty among leisure tourists. The use of social media communication for marketing and sales is generally weak or non-existent, except among those tour operators, travel agents, and tourism MSMEs engaged in leisure tourism (where MSMEs are generally not represented). Very few tourism MSMEs can use online platforms such as Trip Advisor to market their businesses and get online reviews. This was especially true in the accommodation cluster, with many saying they were not aware of such kinds of opportunities or were not able to pay the costs involved. The lack of social media advocacy and online reviews means that most tourism MSMEs businesses are not visible to potential tourists; this is a missed opportunity in brand marketing as social media is a cheaper means to do such marketing to build greater visibility.

The study also established that most tourism MSMEs businesses did not have deliberate marketing and sales strategies. This is another aspect of an inefficient and unsystematic approach to business marketing, resulting in an unclear scope (how) and budget to implement the strategies. This also points to limited entrepreneurship and tourism

marketing skills so tourism MSMEs pay little or no attention to crucial aspects of business development that can support business growth and sustainability. The lack of computer and general ICT skills also means most tourism MSMEs businesses need more exposure to business management skills to understand the needs of tourism business, and the need for supportive tools that make their businesses thrive in different parts of the country, both for domestic and international tourism.

Current and Future Roles to be Played by The Tourism MSMEs, in Tourism Development

Findings show that out of a total of 117 respondents interviewed, 83% were involved in tourism business planning; 70% in tourism product development and packaging, 80% in managing tourism operations, 73% in managing tourist experiences, 50% in financial planning, 53.3% in managing financial controls and record-keeping, 57% in financing their businesses, 73% in tourism product marketing and sales management, 47% in tourism business digital marketing, 40% in managing tourism-centric human resources teams, 50% in networking, 40% in managing tourism business events, 37% in tour and safari guiding, 20% in craftsmanship and 43% in social corporate investment in tourism.

The study further showed that 47% work in tourism business digital marketing, 40% in managing tourism-centric human resource teams, 50% in networking, and 43% in social corporate investment in the tourism sector. Many operators however avoid such roles for various reasons, yet they are essential for achieving business development objectives. The survey shows that a significant proportion of the tourism MSMEs interviewed would like to improve the standard and quality of business offerings, customer retention/repeat business, business revenues; invest in Digital Marketing (website, ICT, social media & use of Digital Booking Platforms); diversify into new product lines, and improve financial record keeping.

This implies capacity-building training interventions which focus on improving entrepreneurship, tourism product development, customer service and loyalty development,

financial management, and digital marketing. This will enable them to understand in detail the key tourism themes related to the Visitor Journey Model that needs to be integrated into technical aspects of business management to improve business practice. A few respondents stated they want to improve the quality and number of their staff. These numbers may be due to the effects of COVID-19 pandemic which has affected most tourism MSMEs significantly in terms of revenues, resulting in many staff being laid off or moved to shift working to manage liquidity and retain skills. As the COVID-19 effects slowly wear off, there may be a need in some tourism businesses for staff to be re-instated and re-skilled.

Findings show that natural disasters especially COVID-19 and lack of access to capital to invest in improvements are the major challenges that may hinder improvements in tourism MSME business development ambitions. Other key challenges include a lack of trained and skilled manpower, stiff competition from other tourism operators, and lack of knowledge on how to effectively improve services, and unaffordable Digital Marketing services. In addition to dealing with Covid-19 protocols to protect staff and guests, the training material needs to integrate business sustainability strategies into the planning to mitigate Covid-19 impacts and find ways to access and meet the requirements of alternative sources of business capital. Other training aspects that need to be prioritized in the program include business competitiveness strategies.

These opportunities include the availability of some Tourism Business Associations in the country; Improved access to Digital Tourism Marketing Services; Availability of financial products for investment in tourism; Improved access to ICT services; Availability of trained and experienced staff in tourism and hospitality; Increased tourist traffic to Tanzania; Improved government tourism policies. The training that is delivered will need to highlight some of these opportunities and provide guidance on how MSMEs could best exploit these opportunities. The opportunity to join an association is a key ingredient to help with the formation of tourism circuits inside Tanzania which are key to achieving platforms for MSME capacity-building, synergies, and greater business competitiveness among local

destinations. On the other hand, helping MSMEs to understand the range of financial products and digital tourism marketing services in Tanzania would strengthen their access to alternative sources of financing and digital marketing, including the ICT services used in a competitive marketplace.

Competency Assessment of the Tourism MSMEs in Tanzania

A total of one hundred seventeen (117) key tourism business competencies were identified in the study to assess the competency levels of tourism MSMEs. These competencies are entrepreneurship, customer needs assessment, product development and testing, tourism operations management, business operations and record keeping, creating tourist offers, financial record keeping, how to access loans, tourism marketing and sales planning, creating loyalty programs, managing multi-culturalism in the tourism business, use of websites in tourism marketing, use of social media in tourism marketing, use of digital tourism booking platforms such as Trip Advisor, team building and staff motivation, the importance of joining tourism associations, business event planning and costing, business event implementation, researching and planning tours, designing and making craft models, and understanding the role of Social Corporate Investment (SCI) as opposed to Corporate Social Responsibility (CRS) in tourism.

Additional Findings of This Study Include:

Entrepreneurship and Product Development Competences

The study shows that the entrepreneurship and product development competencies are lacking in all the cluster locations, as demonstrated by the general lack of tourism product development creativity, innovation, and the lack of competitiveness in tourism MSMEs businesses across the sub-sectors. The TNA questionnaire survey confirms these findings. In general, findings from those interviewed indicated their entrepreneurship competence is partially developed overall (53%).

Customer Needs Assessment

Findings show that the customer needs assessment competence is generally not well-developed across the cluster locations. This is evidenced by the tourism MSMEs inability to offer products and services that respond to tourists' needs, such as signage to enable customers to locate the businesses, linkages between businesses and other services, such as transport and tours to attractions, use of electronic payment services, good customer service, availability of WIFI, etc.

The FGDs also revealed that tourism MSMEs often lack the ability and knowledge to undertake customer needs assessment and, as a result, they offer services that do not respond well to their needs. In some cases, the respondents stated that they often lack the resources to respond to customer needs. In summary, respondents in all cluster locations expressed a lack of confidence to undertake customer needs assessments and then responding appropriately due to capacity constraints.

Tourism Operations Management

The study discovered that tourism operations management competence is partially developed in all the cluster locations as shown in the tourism MSME's inability to offer quality services to visitors such as efficient and professional management of tourism operations. Other examples included the tourism MSMEs inability (in all sector locations) to deal with cases of service failure and crisis management such as COVID-19. The TNA questionnaire survey also showed that tourism operations management competence is partially developed among tourism MSMEs interviewed from across the cluster locations and sub-sectors (50%).

Financial Record-Keeping

The trend of lack of financial business records management was consistent in all the cluster sites and sub-sectors which undermines the professional approach to business management and threatens business viability. Participants in the FDGs and KIIs generally

expressed a lack of confidence as being the reason why most of their businesses do not keep financial records. The TNA survey findings confirmed this, showing that the tourism MSMEs interviewed have under-developed levels of competence in financial record-keeping (43.3%).

How to Access Loans

The findings showed that the ability to access loans is not developed among the tourism MSMEs interviewed in all five cluster locations. The TNA survey found a similar trend overall (43.3%), which is largely consistent among the sub-sectors interviewed. Overall, a significant proportion of MSMEs interviewed in the five circuits lack knowledge on how to access loans from banks and other sources.

Tourism Marketing and Sales Management

Qualitative study findings showed that generally, tourism marketing and sales management competence is partially developed in the five circuits among MSMEs in the five sub-sectors interviewed. This is corroborated by the TNA survey where overall findings show that the competence level stood at 43.3%. Evidence of this lack is seen in the circuits' inability to jointly market their attractions. Individually, the tourism MSMEs in the five sub-sectors acknowledged that they do not often have tourism marketing budgets, so they do not undertake sales activities but just wait for customer visits. Their ability to develop good-quality tourism products and services also undermines their potential to compete effectively, especially with their counterparts in East Africa.

Creating Customer Loyalty Programs

Related to marketing and sales management competence is the ability of tourism MSMEs to create customer loyalty programs that promote patronage and strengthen the destination dollar per capita. Findings showed this ability is generally not well-developed

among those tourism MSMEs interviewed overall (40%). This means a significant proportion of respondents in the four tourism circuits in the mainland, Island of Zanzibar and sub-sectors lack the confidence to create customer loyalty programs for their tourism businesses. This has resulted in short stays and lower spending levels by the visitors.

Managing Multi-Culturalism in the Tourism Business

The study shows that generally, managing multiculturalism in tourism business competence is partially developed among tourism MSMEs interviewed in the four tourism circuits in Tanzania covering the mainland and the Island of Zanzibar. The TNA study recorded a score of 46.7% overall. The key challenge was language proficiency with most players in the sector facing challenges communicating in foreign languages, especially English which is spoken by most of their visitors.

Use of Websites and Social Media in Tourism Marketing

The survey findings showed that in general, the ability to use websites and social media for tourism marketing is not developed among the tourism MSMEs interviewed across all tourism circuits in Tanzania covering the mainland and the Island of Zanzibar. The TNA survey corroborated this at 41.4% in website use, and 36.7% in social media, with respondents saying they are partially able to use websites. This issue is especially prominent among tour operators, art and crafters makers and tour guides.

Use of Digital Tourism Booking Platforms such as Trip Advisor

Findings showed that the ability to use digital booking platforms for tourism marketing is generally thought to be for accommodation operators by those in all the tourism circuits in Tanzania covering the mainland and the Island of Zanzibar. Two-thirds of the other sub-sectors (66.7%) indicated that it was not relevant to them which is a significant proportion lacking understanding and confidence in how to use digital tourism booking platforms.

Respondents also cited unfavorably high fees associated with the use of these platforms as a deterrent to using them.

Understanding the Importance of Joining Tourism Associations

Findings showed the general level of understanding of the importance of joining tourism associations is partially developed among tourism MSMEs interviewed across all the tourism circuits in Tanzania covering the mainland and Island of Zanzibar. The TNA survey found that 44.8% overall of those in the accommodation sub-sector were slightly higher in understanding the importance of joining tourism associations because of the strong Hotels Association of Tanzania (HAT) presence at the national level. This limited appreciation of the importance of joining associations presents a challenge for the promotion of local tourist attractions in the country.

Researching and Planning Tours

This competence was related mainly to the tour guides sub-sector in the survey design so it did not apply to 83% of the respondents. For those that responded in the tourism circuits in Tanzania covering the mainland and Island of Zanzibar, findings showed that the competence for 'research and planning tours' is very well-developed among the tour guides interviewed (83.3%). This largely agrees with the findings of the qualitative survey which pointed to MNRT training programs taking place over the past years that mainly target tour guides in the different cluster locations.

Corporate Social Investment

Understanding the role of Corporate Social Investment (CSI) as opposed to Corporate Social Responsibility (CSR) in tourism: For this competence, findings showed that understanding of the role of CSI is not developed among tourism MSMEs interviewed in all the cluster sites. The TNA survey found a limited understanding of the concept at 66.7%

overall. Often, the concept is explained in the context of SCR, even though there is a marked difference between the two concepts. This means a significant proportion of respondents overall, and within-cluster sites, lack an understanding of the role of CSR in tourism business development. The CSI is an emerging concept that looks to cultivate a mutually beneficial relationship between communities and tourism operators wanting to promote tourism.

Training and Capacity-Building Interventions that Could Strengthen the Capabilities of MSMEs in Tourism Development

Using the Visitor Journey Model phases as a basis for analysis, the TNA survey has revealed significant gaps, especially in tourism knowledge and skills, among a significant proportion of tourism MSMEs in the tourism sector. The widespread lack of professional tourism skills points to limited prior training opportunities for tourism business development with most MSMEs unable to attract significant leisure-related tourism businesses. The MSMEs need equipping with tourism knowledge, skills, and competencies to contribute to greater competitiveness in the sector, in line with the Tanzania Tourism Master Plan.

5. CONCLUSION

Training needs assessment of tourism MSMEs and other players operating in the tourism sector, including women and young people, was conducted to identify their knowledge, skills, and competency gaps in Tanzania. The study involved 117 respondents from different tourism circuits and specifically the Northern Tourism Circuit, Western Tourism Circuit, Southern Tourism Circuit, Eastern Tourism Circuit, and Zanzibar. In addition, the survey included respondents from the Ministry of Natural Resources and Tourism (MNRT) and its agencies. Respondents were drawn from several tourism sub-sectors, particularly those working in the Accommodation; Food and beverages; Transporters; Travel Services; Tourist Attractions; Direct Retailers to Tourists; and vii) Other tourism-related institutions at the destination. Respondents were selected using purposive sampling. Using the Visitor

Journey Model phases as a tool for analysis, the TNA survey has revealed significant gaps in the tourism MSMEs in terms of tourism knowledge, skills, and competencies. The survey also found that only a fraction of the tourism MSMEs had exposure to tourism training-related courses. This may have contributed to the overall low competency assessment scores within the sub-sectors.

This is consistent with the findings of other studies which found that tourism MSMEs generally lack access to training, and are often self-taught. Exposure to tourism as a discipline is generally very limited, which has contributed to attendant gaps in tourism marketing, ease of booking including lack of websites, limited engagement with marketing agents, limited use of booking platforms, weak information management, and generally poor packaging of tourism products. This has resulted in limited professional tourism business practice in the tourism MSMEs sector rendering it less competitive in attracting and maintaining visitors which has seen limited contribution to the goals of the national tourism strategy.

There is a need to move towards a more professional tourism business development approach and practice. This can best be achieved when a greater number of tourism MSMEs in the 8 subsectors work more closely together in formal location-based, to gain leverage on their synergies, so they can carry out targeted destination marketing and enhance the competitiveness among the tourism circuits across Tanzania.

Specifically, this study recommends as follows:

- a) There is a need to address the existing gaps in the tourism MSMEs due to a lack of training through the development of tourism business training material guided by the six phases of the Visitor Journey Model to equip MSMEs in the tourism sub-sectors in all crucial business development elements based on the needs of the visitor.
- b) Integrate COVID-19 preventive measures in the plan for delivery of the tourism MSME training sessions in respect of national Covid-19 preventive guidelines.

- c) Respondents recommended that the tourism MSMEs training should provide certification and accreditation to ensure recognition in the country and the region, especially for Tour Operators, Event Organizers, and Tour Guides.

Suggestions for Future Research

- a) Another research is needed to establish and integrate generic elements of tourism business training for addressing skill gaps in the tourism sector in Tanzania.
- b) A comprehensive study is required for guiding a criterion for the selection of tourism MSMEs that will participate in capacity-building programs, with a special focus on women and youth in the country.
- c) There is a need for research to determine the appropriate training, design and delivery methodology. The methodology should among other things adopt adult education approaches using case study learning and training approaches that promote interaction and full participation of participants to enhance learning and training outcomes including the application of tourism knowledge.
- d) Also, an extensive study is required for determining an appropriate approach that will be used to ensure that tourism business owners and operators participate in the capacity-building programs.

Limitations and Delimitations

The survey was conducted while Coronavirus (COVID-19) pandemic was still unfolding in the world, including Tanzania. The researcher observed all safety and health guidance provided by the World Health Organization (WHO), and the Ministry of Health in Tanzania, to protect himself, respondents, and all the people he interacted with during the study. The measures included observing social distance, using sanitisers, washing hands with soap before and after every interview session, and wearing masks in some instances

where it was deemed necessary. Telephone and visual platforms such as zoom, skype, Microsoft Teams, and WhatsApp were mainly used during one on one interviews.

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