

Importance-Performance Analysis: A Diagnostic Tool for the Development of Tourism in Nigeria

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Abstract

This paper used the Importance-Performance Analysis framework to diagnose the situation in tourism development in Nigeria. The analysis gives a summary of the stakeholders' views on the state of tourism development. The findings presented in this paper mainly revealed that almost all of the tourism planning variables assessed were perceived to be important to tourism development. However, regarding performance, the tourism sector is not doing so well in virtually all the areas which warrant that tourism planners need to concentrate on most of the variables in future tourism planning activities. This paper has clear implications for the Nigerian tourism sector and requires that urgent actions be taken to improve on most of the variables that are performing poorly to ensure that the industry develops into a tourist destination in Africa, as it aspires to be.

1 Introduction

Despite the tourism potentials in Nigeria, tourism development in the country has been affected by several challenges in the country. For example, the Nigeria Presidential Council on Tourism Development in 2005 identified some problems that militate against tourism development in Nigeria, including inadequate funding, the absence of a tourism master plan, the poor state of infrastructure, internal security, the lack of a tourism development fund and policy discontinuity (Okpanku, 2015). Also, Ajayi (2012) recorded a lack of facilities and infrastructure, the non-existence of a national carrier, poor management and lastly the insurgency which has virtually crippled other sectors of the country's economy. Correspondingly, Agbebi (2014) still echoed some of these concerns that confront the industry (such as funding, corruption, lack of strong commitment and dedication, the ineptitude of personnel, policy flip-flop and bad implementation). From these scholars' comments, after eight years of identifying tourism as a viable sector in 2006 and the formulation of the Nigerian

Tourism Development Master Plan, there is still evidence to suggest that little has been achieved over the twelve years.

For Esu (2015) Nigeria's tourism legal environment is weak and has minimal tourism legislation. He also stated that for the Nigerian Government to benefit from the massive tourism potential, there is a need to establish an institutional and regulatory framework to enable tourism entrepreneurs to succeed (Esu, 2015). Further, another issue is the absence of an institutional or organisational capacity to control tourism at the national level Honey & Gilpin (2009). Moreover, the overlaps among government departments at both national and regional levels pose difficulty in working out a coordinated plan (Honey and Gilpin, 2009).

Further, there have been problems with implementing tourism policies, and local communities can frustrate tourism policy implementation effort if such policies were formulated without their input in the first instance or if they are unhappy with tourism development. Generally, in Nigeria policy formulation and decision-making is passive and top-down, and there have been issues in tourism development in some communities, for example, Erin-Ijesha in Osun State (Adeyemo & Bada, 2016). It could be said that since the top-down approach has not recorded much success in time past, there should be greater emphasis on changing this standpoint. Other issues are the lack of reliable data on the numbers of international arrivals and departures from Nigeria (Adeleke, 2008; NTDMP, 2006).

Tourism is considered to hold the potential for economic development in Nigeria if there is political stability (Dickson & Dickinson, 2015). In this context, Adeleke (2008) states that for Nigeria to be able to develop tourism, the government need to ensure peace and stability. This is because images perceived by tourists about Nigeria include those of crime, corruption and terrorism: Boko Haram insurgencies in Northern Nigeria, political violence, militancy and kidnapping in the Niger-Delta area of Nigeria. A prominent case is the terrorist attack on the Government Secondary School Chibok, Borno State in April 2014 when the Boko Haram sect abducted over 200 young school teenagers which attracted global attention, the "Bring back our girls" BBOG campaign all over the world. Also, recently in March 2018 saw the abduction of 110 Secondary School girls in Dapchi, Yobe State. The Boko Haram attacks have escalated the security crisis in Nigeria since 2010 (Hoffmann, 2013).

Having identified the tourism sector as a priority with potential for economic development as late as 1999, it was at this time that the government began to pay attention to tourism development, tourism policy and planning (Adeleke, 2008; Nwanne, 2016). For example, as

the military Head of State between 1976 and 1979, Chief Olusegun Obasanjo allocated NGN1million to each state for tourism development (Fagbile, 2006). It was not until 1999 that tourism issues started to spring up again when the democratic government came into power during Chief Olusegun Obasanjo's regime as President (Fagbile, 2006). Likewise, during his second regime as President in the year 2006, the government authority identified tourism as a priority industry capable of earning foreign exchange and bringing economic development (NTDMP, 2006). Despite these, tourism development still encounter some difficulties.

Given the fluidity of the tourism sector and the diverse range of stakeholders involved, tourism development can be complex. Tourism planners and destination managers can use an awareness of stakeholders' experiences and what is thought relevant to tourism development as a guide development. The importance–performance analysis (IPA), is a relevant model that can be used to address questions about tourism development. This study used the IPA to analyse tourist development in Nigeria.

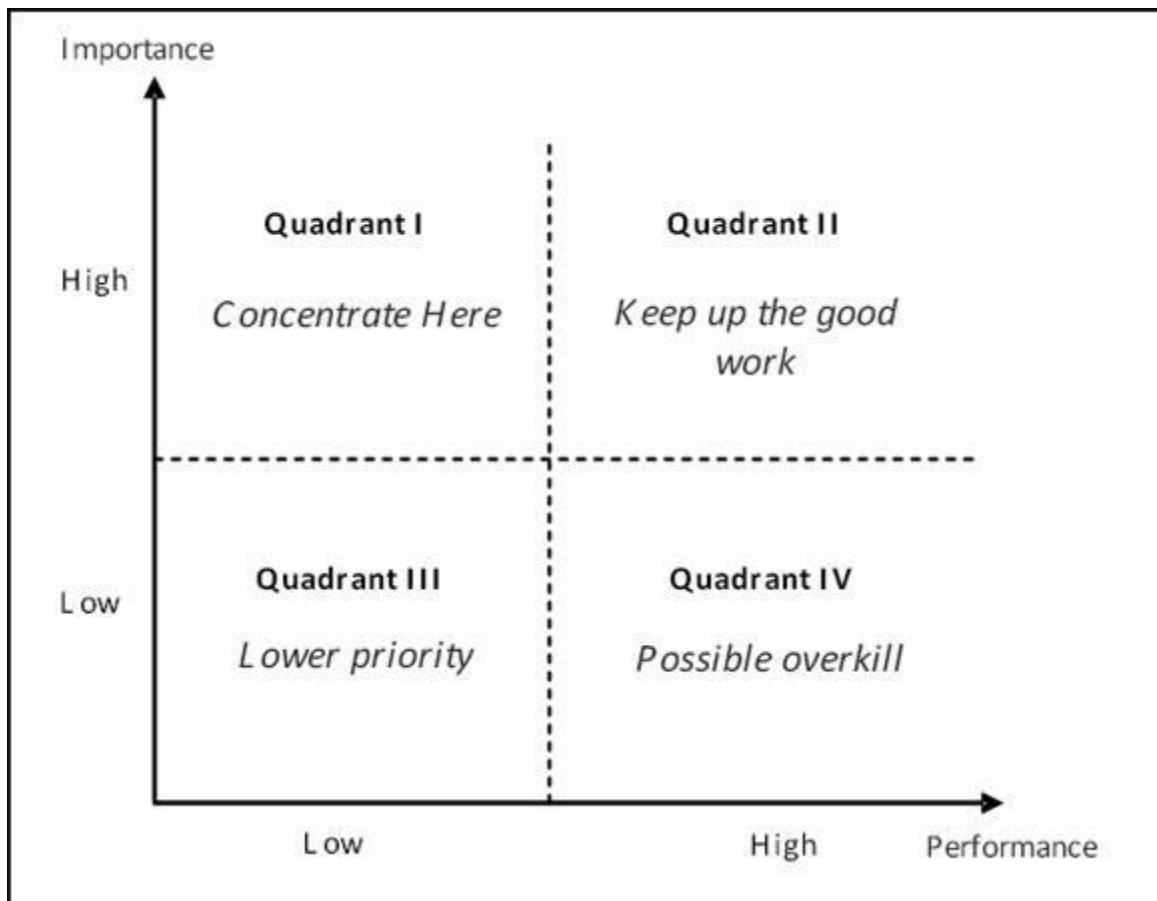
2 The Importance-Performance Analysis (IPA)

The Importance-Performance Analysis (IPA) framework is designed to assess the importance and performance of many variables simultaneously. IPA has been used to evaluate in different field such as the banking industry ((Matzler et al., 2003), education (Silva & Fernandes, 2011), destination marketing and tourism management (Griffin & Edwards, 2012). It can guide organisations in identifying the most appropriate strategic options to enhance competitiveness (Lai & Hitchcock, 2015). Using the IPA technique, results can be presented in a two-dimensional grid to show the strengths and weaknesses of the tourism variables being studied ((Evans & Chon, 1989). With a visual analysis of the data, policymakers or managers can identify the areas where the resources and programs need to be concentrated and where they might be misdirected according to the respondent feedback (Evans and Chon, 1989). This research expands on the work of Evans and Chon (1989), which adopted the IPA matrix to solve tourism problems and resolve policy issues in two tourists' destinations in the United States of America. Put simply, variables deemed 'very important' and to be performing 'very poorly' will be those of greatest concern to policymakers and stakeholders.

According to Evans and Chon (1989) and Lai and Hitchcock (2015), the importance-performance analysis follows three simple steps which include:

1. The development of a list of variables to be used in the study. The variable list is the foundation upon which one builds, and it is essential to develop a list which accurately reflects the relevant issues. Again, Lopes & Maia (2012) emphasise that determining the variables to measure is a crucial factor in the success of IPA.
2. The determination of a sample frame to conduct the survey research.
3. The calculation of the perceived Importance-Performance Analysis of each variable studied. The matrix, made up of four quadrants, allows each variable to be plotted according to its perceived importance and performance. The IPA is presented using a two-dimensional matrix where the x-axis depicts 'performance' and the y-axis depicts 'importance' (Prajogo & McDermott, 2011; Tzeng & Chang, 2011), this is illustrated in Figure 1.

Figure 1 The importance–performance analysis



Source: Tzeng and Chang (2011)

Quadrant I: variables that fall into this cell reflect that they are very important to the respondents, whereas the performance levels are relatively low. This communicates a direct message that improvement efforts should 'concentrate here' (Evans and Chon, 1989). It is of

high importance and low performance, and there is need for immediate attention as the organisation has a significant weakness in this area ((Deng, 2007).

Quadrant II: represents variables described as being very important to the respondents and, at the same time, the destination seems to have high levels of performance on these activities. The message here is to 'keep up the good work'. It is of high importance, and high-performance value needs to be maintained here (Evans and Chon, 1989; Deng, 2007).

Quadrant III: is characterised by variables with low importance and performance ratings. Even if the level of performance is low in this cell, managers should not be excessively concerned since the variables are perceived to be of 'low priority'. Limited resources should be expended on these low priority variables (Evans and Chon, 1989).

Quadrant IV: the last cell represents variables of low importance, but relatively high performance. Respondents are satisfied with the organisation/destination's performance but fail to match a great deal of importance to it, meaning 'possible overkill' (Evans and Chon, 1989). This implies that the resources managers commit to these variables could be used elsewhere, i.e., in Quadrants I or II (Prajogo and McDermott, 2011).

The IPA model is useful as a diagnostic tool used to examine the level of importance that people associate with a variable and the level of its performance as perceived by them (Griffin and Edwards, 2012). Further, the analysis of representation from IPA can help formulate an action plan to improve on the variables that have been identified not to be doing well (ibid.). When plotting the IPA matrix, the scaling of the axes and the location of variables into the four quadrants is critical since this determines the results and their interpretation (Matzler et al., 2003). The strategies implemented from the results derived can address the crucial issues (Lopes and Maia, 2012).

According to Lai and Hitchcock (2015), a comprehensive review of the literature is essential to justify the values of the new attributes set. Hence, the review of the literature was done to derive the list of issues/questions addressed by the IPA in this research. This is presented in Table 1.

3 Methodology

The questionnaire was designed using Qualtrics online survey software. Following the recommendations by Martilla & James, (1977), the variables included in the questionnaire were selected through the review of existing literature (see list of variables used in designing the questionnaire in Table 1. These variables were used to create the sections in the tourism policy and planning importance-performance questionnaire. The importance measures were placed on one side, and the performance measures beside it, to allow the respondents progress naturally from one question to the other. This has been adopted in other importance-performance analysis studies for example Frauman & Banks (2012) and Griffin and Edwards (2012).

Table 1 Variables selected from the literature for IPA the questionnaire

THEMES	VARIABLES
SITUATION ANALYSIS – ENVIRONMENTAL SITUATION ANALYSIS (MICRO	Theft/ attack (Mair, 2015; Mansfeld & Jonas, 2006; Pearsall & Pierce, 2010; Wade & Eagles, 2003) Crime rate (Blancas et al., 2010; Frauman & Banks, 2011; Kim et al., 2012; McCool et al., 2001; Nunkoo, 2015; Sharma et al., 2008; Wan, 2012).
AND MACRO)	Incorporation and implementation of local ideas in community/ site management ((Choi & Sirakaya, 2006)
	Tourism related master plan (Choi & Sirakaya, 2006; Dodds, 2007; Sofield & Li, 2011)
	Availability of development control policy (Choi and Sirakaya, 2006).
	Local resident participation in planning process (Choi & Sirakaya, 2006; Landorf, 2009). Stakeholder collaboration (Bello et al., 2016; Choi & Sirakaya, 2006; Ezeuduji, 2015; Landorf, 2009)Ezeuduji, 2015; Bello, Carr and Lovelock, 2016(Adebayo & Butcher, 2021)). Level of cooperation among stakeholder groups (Choi and Sirakaya, 2006).
	Regional development, economic restructuring ((Baidal, 2004; Dredge & Jenkins, 2003; Mair, 2006, 2015).
	Employment in tourism (Choi & Sirakaya, 2006; Simao & Partidario, 2012). The planning document quantifies the economic benefit of tourism to the area. The planning document quantifies the employment creation ability of local tourism activity The planning document identifies the major economic activities in the local area The planning document establishes the relative importance of tourism, compared with other industries, to the economic development of the local area The planning document evaluates the adequacy of business skills possessed by local tourism industry operators The planning document includes quantitative analysis of current visitor numbers, length of stay and spending The planning document includes broadly based goals related to the economic benefits of future tourism development Specific objectives target the equitable distribution of tourism’s economic benefits throughout the local area (Simpson, 2001; Ruhanen, 2004).
	Indigenous product development opportunities; Marketing of indigenous product; Indigenous employment opportunities; Indigenous business development opportunities; (Whitford & Ruhanen, 2010).
	Availability of local credit to local business (Choi and Sirakaya, 2006).
	Percent of income leakage out of local community (Choi and Sirakaya, 2006).
	Seasonality of tourism/tourist visitation (Choi and Sirakaya, 2006). Conservation and environmental protection (Cao, 2015) flora and fauna (Simão and Partidário, 2012). Future development goals (Ruhanen, 2004). Restoration of attractions (Zhang et al., 1999) Use of low-impact technology (Choi and Sirakaya, 2006).

Incorporation of environmental criteria in tourism planning (Torres-Delgado & Saarinen, 2014). The planning document describes the area's principal geographic features

	<p>The planning document describes the main characteristics of the local climate</p> <p>The planning document identifies flora and fauna which are unique to the area</p> <p>The planning document assesses the resilience and/or fragility of the physical environment</p> <p>The planning document describes the principal tourism sites in the area</p> <p>The planning document evaluates the current capacity of tourism plant and infrastructure</p> <p>The planning document includes broadly based goals related to environmental protection ((Ruhanen, 2004; Simpson, 2001).</p>
	<p>Distribution of land uses for tourism (Torres- Delgado & Palomeque, 2014; Whitford & Ruhanen, 2010).</p> <p>Environmental protection of indigenous land ((Whitford & Ruhanen, 2010)</p> <p>The planning document identifies current land use and ownership patterns in the area (Ruhanen, 2004; Simpson, 2001).</p>
	<p>Air quality index</p> <p>Amount of erosion on the natural sites,</p> <p>Frequency of environmental accidents related to tourism (Choi and Sirakaya, 2006).</p>
	<p>Degradation/erosion of natural and cultural resource (Choi and Sirakaya, 2006).</p>
	<p>Availability of funds for maintaining cultural sites (Choi and Sirakaya, 2006; Whitford and Ruhanen, 2010).</p>
	<p>Retention of local customs and language,</p> <p>Loss of authenticity and becoming impersonal (Cao, 2015; Choi & Sirakaya, 2006).</p> <p>Indigenous product/cultural authenticity; Quality of life improvements ((Landorf, 2009; Whitford & Ruhanen, 2010).</p>
	<p>Host community satisfaction and attitude toward tourism development (Choi and Sirakaya, 2006).</p> <p>Continuance of traditional activities by local residents (Choi and Sirakaya, 2006).</p> <p>Resident involvement in tourism industry (Choi and Sirakaya, 2006).</p>
	<p>The planning document identifies current population levels and demographics</p> <p>The planning document acknowledges a need to integrate local tourism strategies with national policies for tourism development (Simpson, 2001; Ruhanen, 2004).</p>
	<p>Accurate data collection and tourism information change (Choi and Sirakaya, 2006).</p>
	<p>Trustworthiness, usefulness and enjoyment on intentions ((Aye et al., 2013).</p>
	<p>GIS for tourism planning and marketing ((van der Merwe & van Niekerk, 2013).</p>
	<p>Training/ educating/ mentoring (Choi and Sirakaya, 2006; Whitford and Ruhanen, 2010).</p>
	<p>Historical buildings (Frauman and Banks, 2011).</p>
	<p>Number of expert consultation in tourism development (Park & Yoon, 2011).</p>
STAKEHOLDER PARTICIPATION	<p>The planning document identifies locally important community values.</p> <p>The planning document identifies locally important lifestyle features.</p> <p>The planning document identifies current issues which are critical to residents.</p> <p>The planning document assesses community attitudes to tourism.</p> <p>The planning document assesses the overall quality of life in the area.</p> <p>The planning document includes a vision for the future which aligns with local community values, attitudes and lifestyles.</p> <p>The planning document includes broadly based goals related to community values and lifestyle protection.</p>

The planning document includes broadly based goals which emphasise the local benefits of tourism development (Simpson, 2001; Ruhanen, 2004).

	<p>Economic benefit (Simão and Partidário, 2012).</p> <p>Level of tourism development, tourist/resident ratio, type of tourist (Panyik, 2012 cited in Panyik, 2015).</p> <p>Seasonality of tourism offer (Torres- Delgado & Palomeque, 2014).</p> <p>Interactions and community legitimacy (Krutwaysho & Bramwell, 2010).</p> <p>Length of residence, Level of knowledge about the industry (Panyik, 2012 cited in Panyik, 2015).</p> <p>Percentage of guides at site that are locals ((Larson & Poudyal, 2012).</p> <p>Operate the destinations welcome centre.</p> <p>Develop and promote special events.</p> <p>Development through media promotion and advantage.</p> <p>Communication of promotional plans to local business.</p> <p>Develop linkages with regional tourism organisations to promote entire region.</p> <p>Spokesperson with government agencies.</p> <p>Assist and support private sector product development.</p> <p>Develop sales staff to solicit group business.</p> <p>Attend consumer and trade travel shows (Evans and Chon, 1989).</p>
	<p>Public-private sector partnership (Ahebwa, 2013; Dredge, 2006)</p> <p>Central government agency(ies) took part in the planning process</p> <p>Relevant regional and/or territorial council(s) took part in the planning process</p> <p>Governmental (national or regional or local) opinion influenced the final strategic direction selected.</p> <p>The relevant regional tourism organisation(s) took part in the planning process.</p> <p>The local tourism industry took part in the planning process.</p> <p>Regional/district tourism organisation or local tourism industry opinion influenced the final strategic direction selected.</p> <p>Representatives of existing visitor groups took part in the planning process.</p> <p>Existing visitor group opinion influenced the final strategic direction selected.</p> <p>Other local organisations (non-tourism) took part in the planning process.</p> <p>Local community took part in the planning process (Simpson, 2001; Ruhanen, 2004). Indigenous participation (Dredge & Jenkins, 2012)(Dredge and Jenkins, 2012).</p> <p>Ordinary local residents took part in the planning process.</p> <p>Secondary stakeholder (other local organisations or local residents) opinion influenced the final strategic direction selected (Simpson, 2001; Ruhanen, 2004).</p> <p>Aviation reform, develop infrastructure (Zhang et al., 1999).</p> <p>Tourism promotion, tourism education/training, development of tourists' attractions (Zhang, Chong and Ap, 1999)</p>

	Centralisation or decentralisation, foreign investment (Zhang, Chong and Ap, 1999).
	Tourism receipt (Zhang, Chong and Ap, 1999).
IMPLEMENTATION AND REVIEW /	Tourist /attitude toward tourism development (Choi & Sirakaya, 2006; McCool et al., 2001).
	Education and training programs for visitors (Choi and Sirakaya, 2006).

IMPLEMENTATION/ MONITORING AND EVALUATION	<p>Golf and tennis opportunities. Historical and cultural. Scenic attractions. Hospitality of local people. Rest/relaxation opportunities. Shopping opportunities. Suitable restaurants. Entertainment. Suitable accommodations (Evans and Chon, 1989).</p> <p>Specific objectives are prioritised in terms of implementation urgency. The planning document clearly assigns responsibility for key task implementation. The planning document contains a clearly articulated review and evaluation mechanism. The planning document estimates the resource costs of the recommended development strategy The planning document indicates specific methods by which the identified resource costs are to be allocated to development participants (Simpson, 2001). The time dimension of the planning process reflects a long-term orientation (Simpson, 2001; Ruhanen, 2004).</p>
STRATEGIC INDICATOR OF DESTINATION PLANNING/ ENDORSEMENT OF A STRATEGIC APPROACH TO DESTINATION PLANNING	<p>Management/operation (Xiao, 2006).</p> <p>Public access to sites, accommodation, transport (Martin & Assenov, 2014).</p> <p>Policy decision-making, clear boundaries between government and private interest (Dredge & Jenkins, 2012).</p> <p>The planning document includes broadly based goals related to the nature and scale of future tourism development. The planning document includes broadly based goals related to community values and lifestyle protection. The planning document includes broadly based goals which emphasise the local benefits of tourism development. The planning document identifies a range of alternative strategies by which broadly based goals may be achieved. The planning document evaluates each strategy option prior to determining a range of specific objectives. Specific objectives support previously established broad goals. Specific objectives selected are based on supply capability as opposed to market demand. Specific objectives selected are realistically achievable in the context of the current situation analysis. Specific objectives for future tourism activity are quantified and readily measurable (Simpson, 2001; Ruhanen, 2004; Landorf, 2009).</p> <p>Occupancy rate for official accommodations ((Blancas et al., 2010). Accommodation development ((Kosmaczewska et al., 2016).</p> <p>Quality of public transport (B(Blancas et al., 2010; Frauman & Banks, 2011).</p> <p>Variety of shopping facilities (Simão and Partidário, 2012).</p>

Policy takes into account the relationship between transport and tourism ((Weston & Davies, 2007).
Tourism marketing strategies and preferences (van der Merwe & van Niekerk, 2013; van Niekerk, 2014) Strategy and planning for indigenous tourism sector.
Involvement and participation in industry Market research (Whitford and Ruhanen, 2010).
Tourism promotion budget (McCool et al., 2001). Existence of sustainable tourism development plan (Choi & Sirakaya, 2006; McCool et al., 2001)

The variables were grouped under four major themes: 1) environmental situation analysis (micro and macro), 2) stakeholder participation, 3) endorsement of a strategic approach to destination planning and 4) implementation/monitoring and evaluation. These broad themes were further divided into twelve sub-themes to form the questionnaire. This asked the stakeholders how important each variable was to tourism policy and planning, and how they would rate the performance of the same variables in the Nigerian tourism industry using a six-point Likert scale, ranging from very important (5) to very unimportant (1) and don't know/ N/A (6). Correspondingly, the performance scale sought to know the performance of each attribute on a six-point Likert-scale, ranging from very high (5) to very low (1) and Don't know/ N/A (6).

Questionnaire piloting

After designing the questionnaire on Qualtrics, a copy was sent via email in PDF format to people for piloting. In total it was piloted by nine academics in the UK and Nigeria. The pilot was done for two main reasons, as advised by Bryman (2012): first, to ensure that the questions and the instructions for completing the questionnaire are clear; second, to ensure that the layout and formatting are clear enough. This was also to guarantee that respondents would understand the questions and respond accordingly.

Administering survey and analysing quantitative data

A questionnaire-based survey is common in leisure and tourism research; it is used when quantified information is needed (Veal, 2017). This type of survey is of two formats: face-to-face or telephone interview design, and the respondent-completion design. In the face-to-face or telephone interview design, the interviewer will read the questions out from the questionnaire and document the answers (Veal, 2017). In the respondent-completion format, the presence of an interviewer is not necessary, it requires the respondent to read the questions and write down their answers on the screen if it is online or on the questionnaire for a paper copy (Veal, 2017).

Some advantages of personally administered questionnaires according to Bougie & Sekaran (2016) are that the researcher can collect the completed questionnaire immediately after the respondent has completed it. Also, it offers the opportunity for the researcher to introduce the topic of research to the respondents and it can motivate them to respond frankly.

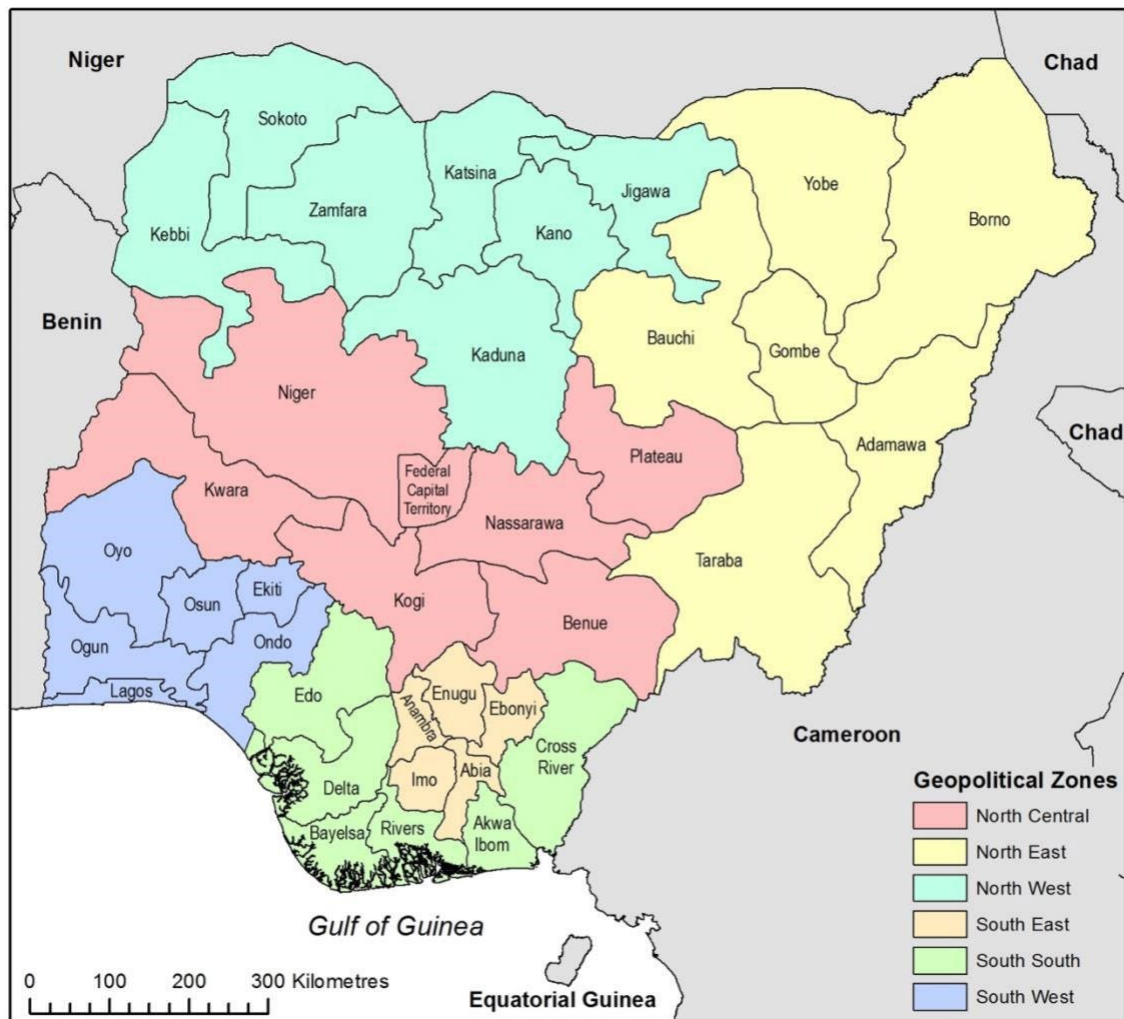
However, a disadvantage is that the researcher may be biased by explaining the questions differently to respondents (Bougie and Sekaran, 2016). To overcome this disadvantage, the researcher only read out the question to the respondents and avoided giving any further explanation, as the information on the research background in the consent form already provided them with all they needed to know about the research. Face-to-face interview format (Veal, 2017) was adopted for this research, and respondent interview arrangement was made between May 2016 and July 2016. Interviews were scheduled from early July to ending of August 2016 with twenty-six (26) stakeholders within the Nigerian tourism industry (see Table 2).

Table 2 Questionnaire survey respondents

Respondents	Number	Stakeholder Group
The Federal Ministry of Information and Culture (FMIC)	1	Federal
National Institute for Cultural Orientation (NICO)	1	Federal
Nigerian Tourism Development Corporation (NTDC)	1	Federal
Tourism directors	4	State
Assistant tourism directors/ employees	2	State
Attraction managers	3	State
Hoteliers/ Events manager	3	Private
Tour operators	3	Private
Airlines managers	2	Private
Academics	3	Academics
Community representative	3	Community
Total	26	

A questionnaire survey was conducted in three out of six geopolitical zones in Nigeria, which included North-Central (Kwara and Federal Capital Territory); South-South (Delta State) and South-West (Oyo, Ogun, Lagos, Ondo, Ekiti and Osun State) (see Figure 2).

Figure 2 Map of Nigeria showing the six geo-political zones



Source: Author (2018)

The data collection was conducted to determine the expectations of stakeholders in tourism concerning how important they perceived the tourism planning and development variables to be, and how the Nigerian tourism industry was performing in relation to these variables.

The survey was administered personally face-to-face by the researcher in the form of an interview. Also, it was discovered from the piloting stage that because of the length and style of the questionnaire, respondents might lose focus or misinterpret the questionnaire (i.e., assessing the two parts of importance and performance). For each interview session, the researcher gave the respondent a consent form and the participant information sheet after agreeing to participate; the consent form was signed and handed back to the researcher.

After this, the questions were read out, and the researcher ticked the questionnaire following their responses to the importance and performance categories.

Respondents were required to rate the variables in each section on a 6-point Likert scale, with a higher number representing a higher rating. They were able to state if they didn't have an experience of a variable, which represents 'don't know' (N/A), this was excluded for the purpose of analysis. This explanatory phase of the research was used to identify the current situation in tourism policy and planning and to clarify the areas where performance is low.

For the data analysis, the responses were entered into Qualtrics where the questions were designed, and after that, the results were imported into Statistical Package for the Social Sciences (SPSS), version 23 for analysis. The importance and performance mean scores of all the variables were analysed using SPSS and was also used to plot the responses into the importance-performance analysis matrix.

4 Results of the variables

The overall results are presented in Tables 3 to 6, which indicates the mean score and standard deviation for all the variables for both the importance and performance questions.

Table 3 Means/standard deviations scores

A. ENVIRONMENTAL SITUATION ANALYSIS (MICRO AND MACRO)	Importance Dimension		Performance Dimension	
	Mean	SD	Mean	SD
i. Political				
1. Addressing safety and security issues at visitor sites and destinations	4.92	.272	2.96	1.148
2. Ensuring public and visitor confidence against crime at public places	4.73	.452	2.77	1.177
3. Policies for reducing crime rate at tourism sites	4.81	.402	2.80	1.080
4. Public image management of Nigeria as a destination that suffers from safety and security issues	4.72	.678	2.79	1.073
5. Tourism policy acknowledges the need to integrate local tourism strategies with national policies for tourism	4.77	.514	2.60	1.225
ii. Economic				
6. Employment creation ability of the tourism industry	4.76	.452	2.96	1.148
7. The contribution of tourism as a pillar of economic development compared to other sectors of the economy has been made explicit to all stakeholder groups by government authorities	4.60	.500	3.04	1.183
8. Adequacy of business skills possessed by local tourism industry operators	4.54	.706	2.35	1.018
9. Specification of goals for future tourism development in Nigeria	4.73	.452	2.81	1.059
10. Distribution of tourism's economic benefits throughout the local area	4.31	.838	2.27	1.079
11. Provision of opportunities and incentives for Indigenous crafts	4.54	.508	2.19	1.021
12. Provision of incentives to locals for business development opportunities	4.40	.707	1.92	.776
13. Government policies and plans to reduce the effects of seasonality	4.42	.902	2.12	1.166
14. Level of foreign investment in tourism	4.68	.690	1.80	.816
iii. Environmental/ Physical				
15. Effective policies for conservation and environmental protection	4.81	.402	2.26	1.023
16. Restoration and maintenance of attractions and cultural/heritage sites	4.69	.471	2.54	1.272
17. Incorporation of environmental criteria in tourism planning	4.46	.508	2.65	1.129

18. The authorities have measured the current environmental carrying capacity of tourism sites	4.32	.802	2.32	.945
19. The resilience and/or fragility of the physical environmental biodiversity have been estimated and are being considered by government authorities	4.21	.658	2.04	.976
20. Land use and ownership patterns are considered by government authorities when planning for tourism	4.46	.582	2.68	1.069
21. Policies for the protection of renewable resource such as solar energy, timber	4.48	.586	2.24	.831
iv. Social				
22. Availability of funds for maintaining cultural sites and other attractions	4.69	.549	2.12	1.275
23. Loss of product/cultural authenticity through tourism commodification	4.16	.800	2.65	1.093
24. Improvement in quality of life through tourism	4.73	.533	2.77	1.107
25. Tourism development does not hinder continuance of traditional activities by local residents	4.50	.510	3.04	1.216
26. Tourism policy takes into consideration current population level and demographics for future planning	4.58	.578	2.69	1.192
v. Technology				
27. Utilisation of Geographical Information System (GIS) technology in tourism planning and marketing	4.73	.452	2.38	1.061
28. The use of social media in promoting Nigeria as a tourism destination	4.85	.368	3.27	1.218
29. The use of social media in promoting local tourism business in Nigeria	4.73	.452	2.77	1.210
vi. Culture and Heritage				
30. Policies for the protection of natural and heritage sites from erosion	4.73	.452	2.42	1.172
31. Avoiding degradation of cultural/heritage resources in tourism development	4.58	.504	2.73	1.185

Note: Scale range: 1-5 for each item. Higher scores indicate higher ratings for each variable.

Table 4 Means/standard deviations scores

B. STAKEHOLDER PARTICIPATION i. Local Community	Importance Dimension		Performance Dimension	
	Mean	SD	Mean	SD
32. Assessment of the overall quality of life in the area	4.54	.508	2.31	.788
33. A vision for the future which aligns with local community values, attitudes and lifestyles	4.46	.508	2.58	1.018
34. Level of local resident's knowledge about the contribution of tourism to regional and national economy	4.73	.452	2.12	.864
35. Number of local tour guides employed on site	4.64	.700	2.62	1.169
36. Involving non-tourism organisations in the planning process	4.24	.831	2.28	1.370
37. Involving of the LOCAL tourism organisations in the planning process	4.58	.929	2.23	1.070
38. Giving local communities' ideas priority over other stakeholders	4.08	.929	2.39	.941
ii. Public-Private Collaboration				
39. Promoting public-private sector partnership	4.77	.430	2.62	1.169
40. Incorporation of (national, regional and local) governments suggestions/ideas/views in decision-making about tourism development strategy	4.54	.508	2.88	1.243
41. Involving of the relevant regional tourism organisation(s) in the planning process	4.50	.510	2.80	1.155
42. Involving of representatives from existing visitor groups in the planning process	4.04	.999	2.17	1.114
43. Development of tourist attractions as part of tourism integrated planning	4.62	.496	2.62	1.329
44. Promotion of cooperation and collaboration among stakeholder groups	4.58	.504	2.73	1.373

Note: Scale range: 1-5 for each item. Higher scores indicate higher ratings for each variable.

Table 5 Means/standard deviations scores

C. ENDORSEMENT OF A STRATEGIC APPROACH TO DESTINATION PLANNING	Importance Dimension		Performance Dimension	
	Mean	SD	Mean	SD
i. Tourism Policy/ Governance				
45. Management function of government in tourism operations	4.35	.689	2.92	1.093
46. The planning process has a long-term orientation	4.35	.892	2.92	1.077
47. Public access to attraction sites, accommodation, transport	4.65	.629	2.92	1.354
48. Specific tourism objectives selected are achievable in the context of the current situation analysis	4.40	.707	2.58	1.060
49. Specific objectives selected are based on supply capability as opposed to market demand	4.40	.707	2.83	1.007
50. Evaluating each strategy option prior to determining a range of specific objectives	4.44	.507	2.79	1.021
51. Specific objectives for future tourism activity have been quantified and readily measurable	4.52	.510	2.56	1.158
52. Maintaining databanks of tourism accounts for the Nigerian tourism industry	4.68	.476	2.32	1.406
53. Adoption of policies by the Nigerian government for promoting entrepreneurship in the tourism industry	4.65	.485	2.58	1.206
54. Availability of training/ educating/ mentoring programmes for tourism employees	4.81	.402	2.38	1.359
55. Experts' consultation involved in tourism development planning	4.64	.496	2.54	1.303
56. Degree of decentralisation of the tourism industry	4.32	.748	2.68	1.282
ii. Strategic Approach				
57. Existence of a segmentation strategy for the Nigerian inbound market	4.32	.476	2.56	1.003
58. Existence of integrated marketing strategy for tourism development	4.50	.510	2.85	.967
59. Policy take into account the relationship between transport and tourism	4.65	.485	2.85	1.190
60. Existence of strategy and planning for domestic tourism sector	4.54	.706	2.69	1.225
61. Existence of communications strategy using traditional mass media such as TV, radio, brochures, newspaper and magazines	4.62	.571	3.04	1.341
62. Existence of an issues/crisis management, public relations strategy (spokesperson, emergency plans)	4.52	.653	2.42	1.060
63. Coordinated and planned development of infrastructure and superstructure for aiding tourism development	4.62	.697	2.35	1.294

Note: Scale range: 1-5 for each item. Higher scores indicate higher ratings for each variable.

Table 6 Means/standard deviations scores

D. IMPLEMENTATION/MONITORING AND EVALUATION i. Visitor Attitude	Importance Dimension		Performance Dimension	
	Mean	SD	Mean	SD
64. Availability of education and training programmes for visitors on environmental protection, respect for local customs and traditions	4.62	.496	2.54	1.303
65. Visitor's opinion of destination features such as historical and cultural, scenic attractions hospitality of local people, rest/relaxation opportunities, shopping opportunities, suitable restaurants, entertainment, suitable accommodation	4.65	.485	3.04	1.306
ii. Sustainability				
66. Prioritising specific objectives in terms of implementation urgency (economic, environment, cultural)	4.54	.508	2.68	1.249
67. Tourism policy clearly assigns responsibility for key task implementation	4.65	.485	2.46	.989
68. Development and promotion of special and mega events	4.58	.703	2.85	1.120
69. Policy estimates the resource costs of the recommended development strategy	4.28	.678	2.42	1.060
70. Policy indicates specific methods by which the identified resource costs are to be allocated to development participants	4.44	.507	2.33	1.167
71. Monitoring occupancy rate for accommodation establishments	4.42	.504	2.24	1.052
72. Provision of quality public transport	4.81	.402	2.27	1.079
73. Policy contains a clearly articulated review and evaluation mechanism	4.46	.508	2.23	1.177
74. Participation in international tourism and travel fairs and exhibitions for the promotion of Nigerian tourism industry	4.58	.504	2.20	1.118
75. Assessment and evaluation of host community attitudes and satisfactions towards tourism	4.73	.452	2.24	1.091

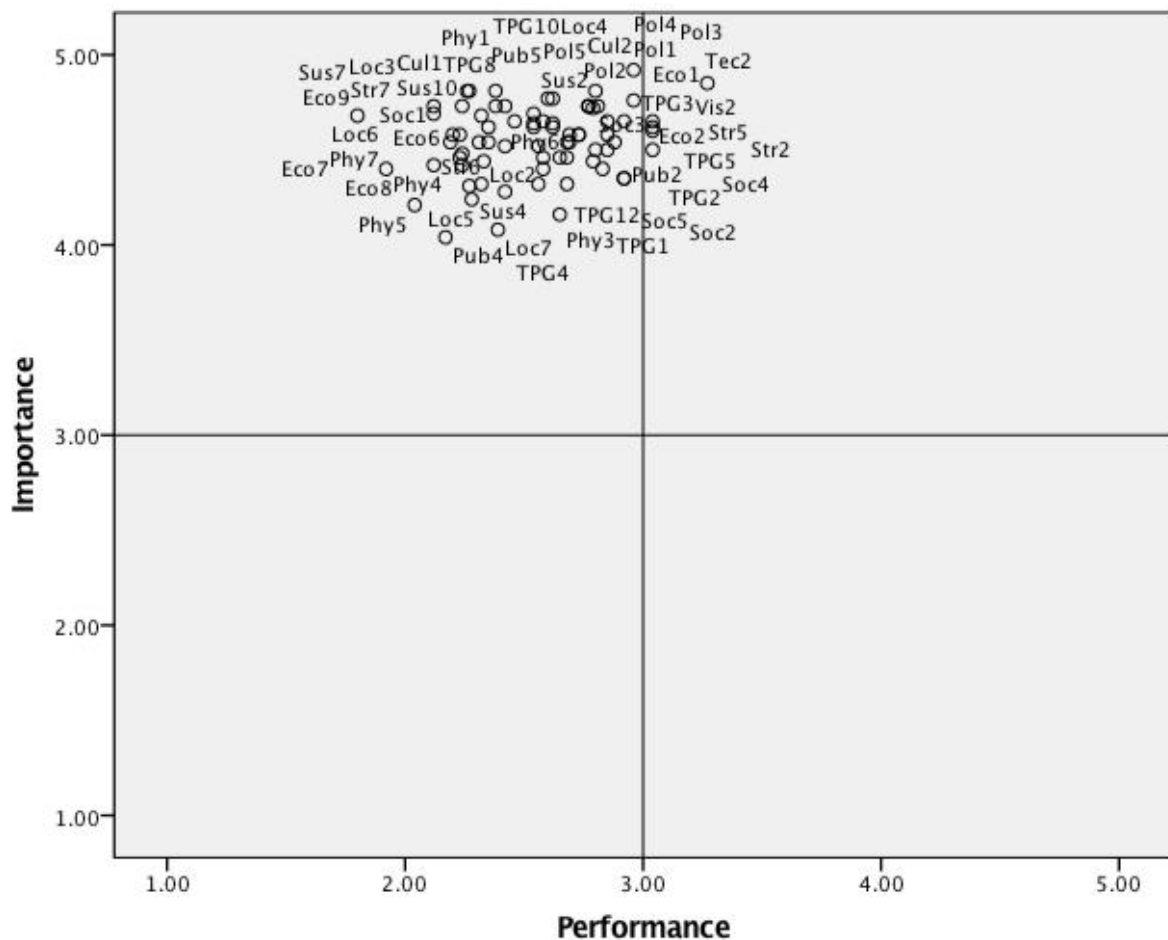
Note: Scale range: 1-5 for each item. Higher scores indicate higher ratings for each variable.

Representation of the variables on IPA matrix

The mean scores for the importance and performance of the variables from Tables 3 to 6 were used to position the grid lines on the IPA matrix. The purpose of plotting the variables on the importance (y-axis) and performance (x-axis) is to establish a broad view of stakeholders across a range of issues examined. In plotting IPA matrix, the scaling of the axes and the location of variables into the four quadrants is critical as this is what determines the results and its interpretation (Matzler et al., 2003). Following Martilla and James (1977) the reference lines on the IPA grid is a point that divides the data into half, and this was added using three as the midpoint of the scale used.

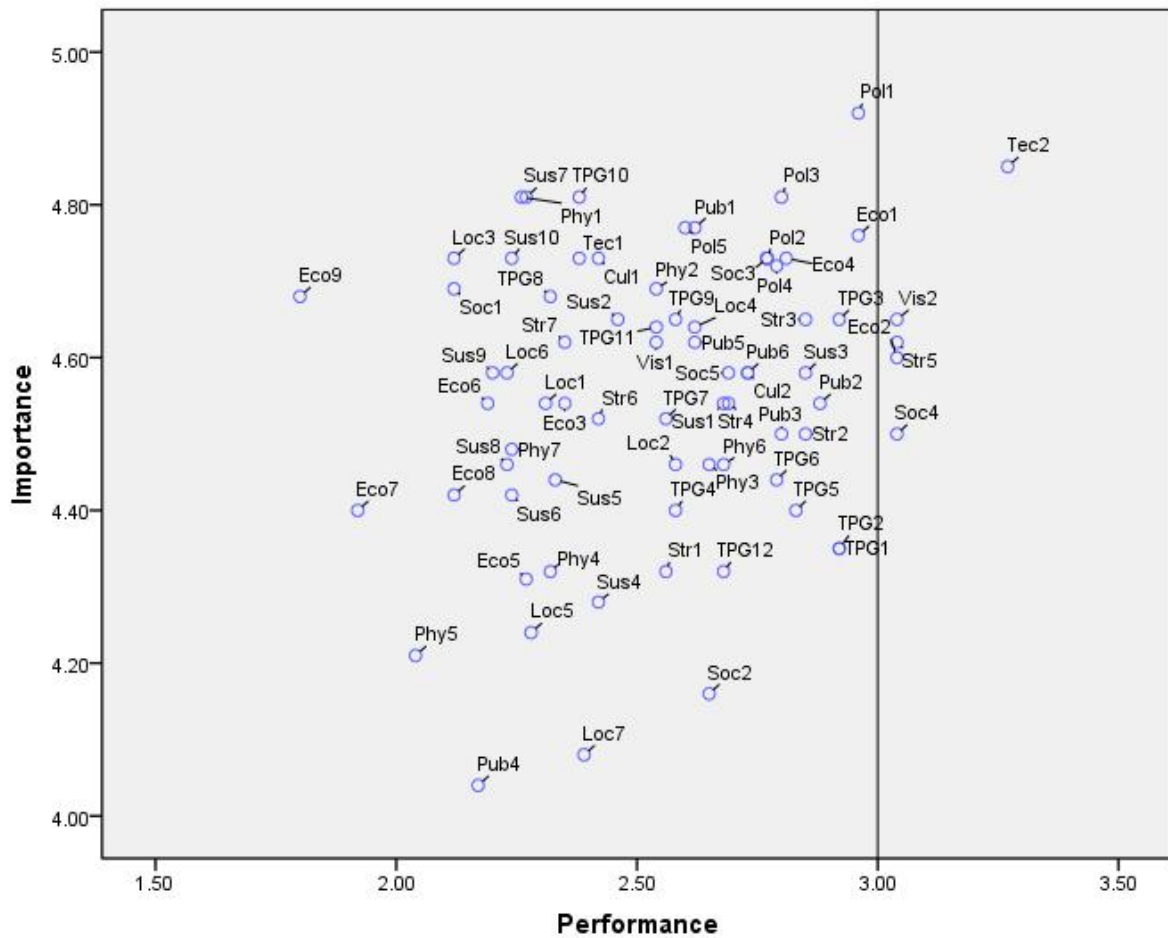
From the diagram, the relevant industry stakeholders and tourism policy makers in Nigeria can be able to identify quickly areas in which they need to focus or improve on for better tourism governance in the future. The IPA grid in Figure 3 represents that the perception across the board among the stakeholders is that there is a defect in most of the variables, except for a few that are doing relatively well.

Figure 3 Tourism policy and planning in Nigeria IPA matrix



Given the clustering of the variable in Figure 3, another zoomed-in matrix is produced in Figure 4, which enables the researcher to see visibly the distributions of these variables within the 'concentrate here' and 'keep up the good work' quadrants.

Figure 4 Tourism policy and planning in Nigeria zoomed-in IPA matrix



4 Discussion

To begin, the results from the IPA give an initial overview of stakeholders' perspectives on tourism policy and planning in Nigeria. One main finding is that almost all the variables assessed were deemed to be important and almost all the areas were deemed to be performing poorly. This is indicated by the mean scores for the importance variables, which are above 4, and those of performances, which are all below 4. In most cases, the importance variables are tending towards the end of the scale range, which means that they are all of high importance but are low in terms of performance both in absolute and relative terms. The standard deviation on the tables also showed that there is more consensus among the stakeholders over what is important and slightly less over the performance.

The results of the variables assessed suggest that there is a need for greater organisation in tourism policy and planning for the industry to succeed in the long-term – although, some of the variables were more important to the stakeholders than others and the same applies for the variables in terms of performance. The result suggests that governance need to address these issues generally.

Most of the variables that fall under the 'concentrate here' quadrants are not being adequately considered right now, as shown in the importance and performance results. These will need to be well thought out when formulating and implementing future tourism policies and plans. Indeed, the analysis does indicate that currently, tourism governance is of concern to the participants in the study, as indicated by their responses to the variables in the questionnaire which consisted of the six sub-categories below:

- a) Environmental (land use and ownership patterns are considered by government authorities when planning for tourism; incorporation of environmental criteria in tourism planning).
- b) Social (loss of product/cultural authenticity through tourism commodification; tourism development does not hinder continuance of traditional activities by local residents, tourism policy takes into consideration current population level and demographics for future planning).
- c) Public-private collaboration (incorporation of national, regional and local government's suggestions/ideas/views in decision-making about tourism development strategy; involving of the relevant regional tourism organisation(s) in the planning process).
- d) Tourism policy/governance (management function of government in tourism operations; the planning process has a long-term orientation; specific objectives selected are based on supply capability as opposed to market demand; evaluating each strategy option prior to determining a range of specific objectives; the degree of decentralisation of the tourism industry).
- e) Strategic approach (existence of integrated marketing strategy for tourism development; the existence of strategy and planning for domestic tourism sector).

- f) Sustainability (prioritising specific objectives regarding implementation urgency, i.e., economic, environment and cultural; development and promotion of special and mega-events).

Generally, for a country like Nigeria that has embarked on tourism development since the 1960s, and prioritised the sector in both 1999 and 2006 (see Chapter 3), the absolute and relative level of 'performance' is generally low compared to the level of 'importance' that stakeholders attributed to the tourism policy and planning variables. The results from the tables show that the mean and standard deviation scores for the importance are similar, hence, there is no notable difference in the distribution of the respective scores. Where the standard deviation for the 'importance' level was lower, this means that the stakeholders had a more consistent reaction in relation to the importance variables. Where the standard deviation was higher in the 'performance' category, this means that the stakeholders had a greater variation of reactions to the variables in terms of performance.

Broadly, for most of the categories, important management implications arise as respondents indicated that the tourism sector in Nigeria has performed low on highly important variables, which come under the 'concentrate here' on quadrant I of the IPA grid, representing 93.4% of the variables. As advised by Deng (2007), there is need for immediate attention as the organisation has a significant weakness in these areas. This is evident through the clustering of the variables on the grid, and those aspects need to be modified in the current and future practices within the industry. The general implication is that there is a need for urgent improvement on most of the variables.

These results confirmed a sense that most Nigeria citizens have, given the nature of governance generally in Nigeria, where the people have a belief that Nigeria as a nation has not got its politics right since attaining independence status in 1960 and that *nothing works in Nigeria* (Rilwan, 2013). It is surprising that even the current President Muhammadu Buhari also stated in one of the National Newspapers that nothing is working normally in the country as a result of the total breakdown of Nigeria's core values over the years (Group, 2016).

However, there is a positive side where the tourism sector is doing relatively well, representing 6.6% of the variables, and the advice here is that they should continue to 'keep up the good

work' in those areas. Since they are of importance, and correspondingly there is a relatively high performance, they need to maintain the present value (Evans and Chon, 1989). They are where an organisation possesses major strengths and have opportunities to achieve a competitive advantage (Deng, 2007), these variables are above 3 and are situated in quadrant II. For example, it was notable that five out of the seventy-five variables were reported to be performing relatively well.

These include:

Eco2: The contribution of tourism as a pillar of economic development compared to other sectors of the economy has been made explicit to all stakeholder groups by government authorities

Soc4: Tourism development does not hinder continuance of traditional activities by local residents

Tec2: The use of social media in promoting Nigeria as a tourism destination

Str5: Existence of communications strategy using traditional mass media such as TV, radio, brochures, newspaper and magazines

Vis2: Visitors' opinions of destination features such as historical and cultural, scenic attractions hospitality of local people, rest/relaxation opportunities, shopping opportunities, suitable restaurants, entertainment, suitable accommodation.

These suggest that the tourism sector has done the right thing in terms of creating awareness amongst the stakeholders on the importance of tourism contribution to the Nigeria economy. This is because it has been acknowledged that tourism can contribute to the economic development of nations (see Dredge, 2010; McDowall & Choi, 2010). Consequently, the sector is being marketed by using traditional mass mediums and technology-social media platforms are also being used. Technology is important to marketing tourism development (Koutra & Edwards, 2012), and the sector has adopted this medium in addition to other traditional mediums. Further, the stakeholders believed that tourism development does not in any way hinder the continuance of traditional activities by local residents. Finally, visitors to tourist attractions in Nigeria are aware of the tourist facilities available to them and that they have an opinion that the facilities are good.

No variables are considered to be of 'low priority', i.e., low importance and low-performance quadrant III. Likewise, none of the variables is positioned in the 'possible overkill' quadrant IV of the IPA matrix. Therefore, quadrant I is the area that needs to be improved upon. Overall, it is believed that the industry is doing the right things in quadrants II and III (Prajogo & McDermott, 2011).

Almost all categories fall within the 'concentrate here' quadrant. These findings are a cause for concern as all the categories in the 'concentrate here' quadrant are politically significant and warrant that tourism planners take action. The distribution of the circles that represent the variables on the grid in the zoomed-in version reveal a somewhat uniform distribution of the variables.

The results do not explicitly enable the researcher to prioritise critical categories of issues to examine further as they reveal that the problem is pervasive, not focused on either political, economic, environment, socio-cultural, technology, culture and heritage, community, public-private collaboration, tourism policy/governance, strategic approach, visitor attitudes, and sustainability. Put simply, there is a lack of pattern that might suggest any of the categories are regarded as either more important or performing better than any other.

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