

Post 2010 evaluation of Zimbabwe as a preferred tourist destination.

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Abstract

This study is a post 2010 evaluation of Zimbabwe as a preferred tourism destination. The post 2010 timeline was deliberately chosen since it was believed to be a water-shed period or game changer in Zimbabwe's tourism landscape following the successful hosting of the Fifa 2010 world cup by South Africa which is Zimbabwe's major economic trading partner. The hosting of the prestigious soccer extravaganza by South Africa was speculated to reconfigure the architecture of Zimbabwe's tourism sector that had been in a comatose for close to a decade. The study established that the post 2010 period is a landmark as it marked the somewhat thawing of political and economic relations between Zimbabwe and western countries following the consummation of the inclusive government that stabilised the economy. The tourism sector was speculated to have been given a new lease of life riding on the perceived spin-offs from South Africa, warming of the international community to Zimbabwe, and the dollarization of the economy. A dozen variables were used as anchor elements against which Zimbabwe was evaluated. A questionnaire survey was used on 80 hotels, 60 tour operators, 20 key informants, and 50 international tourists at Great Zimbabwe and Victoria Falls. Results confirm that Zimbabwe indeed has raised the bar higher as a preferred tourist destination relative to other southern Africa countries as attested to by playing host to the UNWTO's General Assembly and ATA congress, and also being the recipient of the tourism award from the European Tourism Council. On the flip-side, visa and pricing regimes are still frowned upon; however, there is huge potential for the country to do better.

Key-words: Zimbabwe tourism industry, post 2010, tourist destination, UNWTO's General Assembly and ATA congress.

Introduction

The tourism sector in Zimbabwe suffered a major setback in 2000 when the country undertook a land reform programme. The land reform did not sit well with Britain, Germany and the US, which kind of like retaliated by issuing travel advisories to their citizenry to avoid Zimbabwe for safety and security concerns. The tourism sector went through a rough patch characterised by very low international arrivals, capacity under-utilisation, economic sanctions, political and economic instability, bad publicity, withdrawal of airline carriers, stratosphere inflation, shortage of basic commodities and fuel, and negative market perception. The year 2009 saw the consummation of the government of national unity (GNU) which brought with it a modicum of political and economic stability. 'Green shoots' of economic recovery were noticed in all the sectors of the economy.

It is against this backdrop that this study seeks to evaluate the competitiveness of destination Zimbabwe in the period post 2010. The collateral benefits to the tourism sector brought about as a result of the GNU were the lifting of travel warnings once issued against Zimbabwe, adoption of the multi-currency trading regime, thawing of economic and political relations between the country and the progressive international community, returning of airline carriers that had pulled out, improvement in the image of the country, and peaking of visitors from the traditional markets.

Concept of destination competitiveness

Competitiveness is increasingly being seen as a critical influence on the performance of many a tourist destination in an increasingly competitive global markets (Enright and Newton, 2005). Tourism destination competitiveness, in particular, has become an area of growing research interest among tourism scholars as evidenced by the works of Hassan, (2000); d`Haueserre, (2000), Faulkner, Oppermann, and Fredline, (1999); Crouch and Ritchie, (1999); and Chon and Mayer, (1995). Pearce`s study (1997) summarised that tourism destination`s capabilities and shortcomings will become crucial given that tourism worldwide is becoming increasingly competitive. Destination competitiveness has “... tremendous ramifications for the tourism industry and is therefore of considerable interest to practitioners and policy makers” (Ritchie and Crouch, 2000:6). This perspective was further buttressed by Dwyer *et al* (2000:10) who stated that it is “...useful for the industry and government to understand where a country`s competitive position is weakest and strongest...”. The current study will draw from Crouch and Ritchie`s (1999) approach to destination competitiveness. Basing on Chon *et al*, (1991; and Hu and Ritchie, (1993) the present study will concentrate on those attributes that are seen as attracting tourists, such as wildlife in general, and the big five to be specific, Great Zimbabwe ruins, and the Victoria Falls. A tourism destination can only be competitive if it can attract and satisfy potential tourists, and this competitiveness is determined both by tourism-specific variables and a much wider variety of factors which influence the tourism service providers.

This study addresses the deficiency of empirical testing of such an approach on destination Zimbabwe`s flag-ship attractions: the big five, Great Zimbabwe and Victoria Falls. This is critical in the context of the frantic efforts being made by the Zimbabwean government envisaging to generate USD15 billion from the tourism sector by end of the year 2015. In addition, given the contemporary discourse in the tourism fraternity whereby the government and tourism players are looking for a lasting solution to making sure that the sector plays a visible role in turning around the economy, this study may be of interest to these key players. The writer is unaware of any study to date that systematically examined the threesome of Great Zimbabwe ruins, the big five and Victoria Falls in the context of the competitiveness of Zimbabwe in the post 2010 period. The study therefore seeks to address this gap in the current body of literature. The study`s results are envisaged to be of value to managers and policy makers in Zimbabwe`s tourism fraternity. The study will also provide practical/workable suggestions on the way forward in redefining the contours of Zimbabwe`s tourism sector. The study will also recommend strategies to be implemented in the short to medium term whilst the strategies for the long haul are also proffered.

Literature review

A generally accepted definition of competitiveness from a national standpoint is the degree to which a nation can produce goods and services that meet the test of the target market while at the same time maintaining the real incomes of the citizens (Waheeduzzaman and Ryans, 1996). Tourism destinations may have an array of world class tourist attractions, which provide sufficient leverage for their competitiveness but it does not guarantee success in tourism development. Other variables like infrastructure, human resource capital and accessibility can stifle the competitiveness of the destination. Crouch and Ritchie (1999:146) posited that “...tourism destination competitiveness is determined by four major components: core resources and attractors, supporting factors and resources, destination management, and qualifying determinants”. The element of core resources and attractors is the fundamental reason as to why prospective visitors choose one destination over another. The current study therefore has the potential to offer a more comprehensive assessment of the factors that influence Zimbabwe`s capability to attract and delight its international tourism customers, not only that but also highlight the variables on the flipside. The study is kind of

like an advisory to the government and tourism players to strengthen and capitalise on their strengths and work on their weaknesses so that the country is firmly put on the global tourism map.

The United Nations World Tourism Organisation has projected that by 2020 Africa will have a modest growth of tourism traffic accounting for 6.4 per cent of the forecast 1.6 billion tourists world-wide. Given the relative importance of the tourism industry in Africa, an analysis of the competitiveness of country destinations should offer invaluable insights. The Southern Africa sub-region will account for the bulk of the tourism traffic of which competition will be intense between Southern Africa member countries. This will be especially the case between Zimbabwe and South Africa who are regarded as rivals by the aggregate arrivals in tourism circles. Similarly, an improved understanding of destination competitiveness should be important for Zimbabwe in Africa, as it may contribute to maintaining or improving the market share in a changing global market.

The current body of literature has revealed that competitiveness of a tourist destination as a concept has received unprecedented attention not only from policy makers and practitioners but also from tourism researchers (Buhalis, 2000; Crouch and Ritchie, 1999; Dwyer *et al*, 2004; Heath, 2003; Enright and Newton, 2004, Hassan, 2000; Ritchie and Crouch, 2000). This has been necessitated by the economic significance of tourism and the ever increasing competition for tourists among tourist destinations. According to Lee and King (2008) destination competitiveness can be evaluated from the perspectives of tourists` satisfaction and sustainable development. Ritchie and Crouch (2003) provided the most comprehensive narrative of destination competitiveness, characterising a tourist destination competitiveness as its ability to increase tourism related expenditure, to increasingly attracting patronage whilst at the same time providing satisfying and unforgettable tourist experiences. These should be provided in a profitable manner, thus enhancing the well-being of local residents and preserving the natural resources of the destination for future generations. Evaluation of a tourist destination`s competitiveness is invaluable in a number of ways for industry and central government. Firstly, it enables the identification of a tourist destination`s shortcomings and strengths, secondly, it can highlight tourism development opportunities, as well as identifying development strategies that can be used to forestall potential threats for future tourism patronage (Dwyer *et al*, 2004).

Although the euphoria for Zimbabwe`s tourism seemed to have waxed and waned between 1999 up to 2008 due to the rough political and economic patch the country went through, statistically, international tourists have persistently sought the breathe-taking wildlife and the imposing and majestic Victoria Falls as well as the antique and mysterious Great Zimbabwe ruins. The economic potential of the tourism industry has inspired many developing and developed countries to financially bankroll, plan and develop those areas where iconic tourist attractions are found, and not only that but also to mount aggressive marketing and promotional campaigns to lure tourists in droves.

Ironically, competition between and amongst tourist destinations is inevitably going to tense in the foreseeable future. In the case of Zimbabwe, effective marketing as a `world of wonders` and therefore first choice international tourist destination will involve ensuring that its competitiveness and the integrity of the fauna, Great Zimbabwe ruins and Victoria Falls experience, are superior to what is offered by South Africa and other competitors within the Southern Africa region and beyond. This therefore calls for further investigation of the various variables determining the competitiveness of tourist destination Zimbabwe. It is the contention of the author that this study can help guide the future development of the revered tourism sector in Zimbabwe and result in far reaching policy implications.

Tourism development

Towner (1996) has proposed that the basic supply components applicable to the development of a tourist destination are: accommodation, food and beverage, entertainment, recreational opportunities, health amenities and services, attractions and general infrastructure. The above provides an insight into the various pre-requisite elements that are desirable in a destination with an international appeal. A range of physical and man-made attractions and resources has always been a necessary complement to the competitiveness of a tourist destination. Lee and King (2008:244) categorically stated that “due to the uniqueness and irreplaceability of these assets, effective destination management will be critical for the achievement of environmental and economic sustainability”. In addition, proximity to major population centres and easy accessibility of these assets are important geographic considerations in the competitiveness of a tourist destination. Equally deserving special emphasis is the tourist destination’s human resource base capital because the overall quality of the tourist destination’s tourism product/experience is influenced by technical skills and professional knowledge of the staff. In view of this, provision of ongoing staff training and evaluation, staying current on specialised tourism services and programs, adjusting to trends and listening and responding to patrons are critical to the competitiveness of a tourism destination (Monteson and Singer, 1992).

It is instructive from the foregoing that the future success of Zimbabwe’s tourism sector hinges on how the authorities will appreciate the prevailing international tourism market demands and how capable they will be in satisfying the needs of the market. The above discourse has illuminated on the major dimensions contributing to the success of the tourism industry, which include the natural endowment of tourism resources and attractions, the formation and implementation of destination strategies and policies, and the changes arising from the industry and macro environments.

Tourist destination competitive models

The literature on destination competitiveness provides some general principles to guide the development of a model (Lee and King, 2009). The development of a model of destination competitiveness is worthwhile because destinations provide a focal point for motivating visitors, delivering tourism products and services, implementing tourism planning and management strategies, and contributing to memorable tourism experiences. Cooper *et al* (2001) regard the tourist destination as the stage upon which tourism theatre takes place. The models of destination competitiveness proposed in the literature serve as frameworks for determining the competitiveness of the whole country as a tourism destination. It is the researcher’s view that these models are not yet capable of determining destination competitiveness in the context of a particular tourist attraction within a tourist destination-Great Zimbabwe ruins, Victoria Falls and the big five in Zimbabwe. Such tourist attractions by extension, just like tourist destinations share a common, basic anatomy but none of them are the same (Howie, 2003). It can therefore be argued that there is need to develop a tourist attraction-specific model of destination competitiveness. The existing literature has, however, provided insights into the identification of components viewed as important in determining the competitiveness of a tourism destination. Drawing upon the previous models of Dwyer and Kim (2003), Enright and Newton (2004), and Ritchie and Crouch (2000), the current study aims to fill this gap in the literature by using an expansive item/determinants checklist to investigate the competitiveness of destination Zimbabwe given the new developments on the political front and the emerging of the Asian market. A basic premise of the present study is that destination Zimbabwe’s competitiveness may be enhanced through deployment of destination resources and attractors. This deployment can occur through the formulation and subsequent implementation of tourism strategies which are up to speed with the dynamic international tourism market. Buhalis (2000) posited that many tourism

resources and attractors cannot be replenished once they are exhausted or destroyed and as such strategy formulation and implementation is needed to ensure that the extent of resource use does not exceed long-term sustainability. This raises alarm bells on Great Zimbabwe and the Victoria Falls where the World Heritage Site has already raised 'red flags' over the rate of destruction and deterioration of these globally acclaimed tourist attractions which are ironically the bedrock of destination Zimbabwe's tourism sector. In addition, the recent killing of Cecil, the lion, has generated a heated debate and condemnation on Zimbabwe's commitment in preserving such wild animals. Kotler *et al* (1993) argued that destination competitiveness is often conditioned or limited by external environmental forces over which the authorities exercise minimal control. This once again puts the present study into perspective given the travel advisories issued against Zimbabwe as a tourist destination by the western traditional markets, the lukewarm political and economic relations between Zimbabwe and western countries following the 2013 national plebiscite won by the ruling ZANU PF party. According to Ritchie and Crouch (2003) tourism destination that are vigilant to environmental changes are likely to act more pro-actively and are better positioned to predict opportunities and threats or at least to judge their probability. Could this be the case to destination Zimbabwe? Can the authorities have a hawkish eye to read and scan the international tourism market simmering on the horizon in the context of the big five, Great Zimbabwe and Victoria Falls? The present study seeks to answer this empirically.

Zimbabwe's tourism industry is made up four major chain groups and numerous independent enterprises operating under the broad regulatory supervision of the Zimbabwe Tourism Authority (ZTA). The prosperity of the sector depends heavily on the big five, Great Zimbabwe and Victoria Falls. The trinity of Great Zimbabwe, the big five and Victoria Falls are deemed as key drivers of the tourism sector in Zimbabwe.

The Zimbabwean government has attempted to stimulate robust tourism development over the past decades, and large scale promotion commenced in the 1990s following the enactment of an act of parliament promulgating the ZTA as the lead marketing agency. Legislation known as the 2 per cent tourism levy was subsequently introduced. The private sector also came in to form the Hospitality Association of Zimbabwe (HAZ) and the Zimbabwe Council of Tourism (ZCT) to safeguard their interest in the lucrative sector. The sector was granted an export status zone and was getting preferential treatment. As a result of these initiatives, substantial progress was made in improving the quality of the Zimbabwean tourism experience for the international tourists. However, much more remains to be done to develop Zimbabwe as a competitive international tourism destination.

Methodology

The present study aims to formulate a guiding or an advisory framework which can assist the Ministry of Tourism and Hospitality Industry, the ZTA and industry practitioners, on how to maximise destination competitiveness and achieve long haul sustainability over the use of the big five, Great Zimbabwe and Victoria Falls. To generate the required empirical data, a survey instrument was constructed itemising the variables that were deemed to influence the competitiveness of tourism destinations. The inclusion of itemised variables was guided by the fact that in previous studies on destination competitiveness a variety of items were adopted by researchers, although some items are common to many approaches (Kim, 1998). Chen (2001) argued that tourists are well placed to evaluate the normal components of destination attractiveness as well as the services that they consume at tourist attractions like Great Zimbabwe and the Victoria Falls. However, they would not know those variables that influence the competitive production of such services. To cater for this, the study surveyed individuals who could respond to questions on both the tourism attractors and the

business features. Questionnaire survey used a 5-point Liker type scale. The study used a dozen of anchor elements inherited and modified from Kim (1998) `s destination key variables.

Results

A dozen key elements revolving around the big five, Great Zimbabwe, and Victoria Falls were used during the questionnaire survey. These were market perception, visa regime, pricing models, physical structures of hotels, accessibility, marketing and promotion, aggregate arrivals, expenditure, MICE destination, human resource capital, attractions, and tourism regulation. Each of these twelve variables is discussed below:

Chain hotels physical structures

Respondents concurred that Zimbabwe`s physical structures found at Great Zimbabwe and Victoria Falls were still intact and comparable to regional competitors despite the current harsh economic environment obtaining in the country. The study established further that there was indeed scope for improvement through face lifting of the structures despite the squeezed lines of credit in funding such exercises. Reservations were noted on the limited number of properties with 5 star rating since only 2 were identified at national level. The tourism sector`s super-structural facilities are intact despite the decade long economic malaise that obtained in the country. On this front Zimbabwe fared very well. This finding is consistent with what was established in other studies that destinations must ensure that their infrastructure and super-structural facilities are as user friendly to visitors as possible, as many destinations fail this fundamental undertaking (Pigram, 1999; Diaz, 2001; Buhalis, 2000), whilst the quality of tourism physical structures also serves to attract or deter tourists. There are notable issues like the need for renovations of some properties that are physically tired and this is one area where significant strides have been made despite the liquidity crunch characterising the dollarized economy. Despite these stakes some meaningful rehabilitative exercises are being taken and have been impactful in sprucing up the image of Zimbabwe`s physical tourism products. Notable investment in hotel structures have been witnessed especially the setting up of the aluminium prefabricated structure in Victoria Falls that was used as a venue for hosting the UWTO General Assembly. To date the physical structures resonate well with visitors and have been given a clean bill of health, and therefore Zimbabwe is competitive on this element.

Accessibility

The study established that ever since the dollarization of the economy destination Zimbabwe despite having the highest parking and landing fees as compared with its regional counter parts, it has renovated its aviation infrastructure, and expanded the run way at Victoria Falls International Airport. This was done to enhance accessibility. The study established that destination Zimbabwe has moved a notch high on accessibility front. Respondents however noted that there has been a slow return of key airline carriers which pulled out during the height of economic and political challenges. The few airlines that have reclaimed the market have ominously scaled down their frequencies and some have ceased servicing the country citing viability concerns. It is clear that most of the airline carriers have not yet gained confidence about Zimbabwe hence have chosen to tread carefully by sitting on the fence.

The very high landing fees costs and departure taxes were cited as a hindrance to many airlines which may be interested to enter the Zimbabwean aerospace. The landing and

departure fees levied by the Civil Aviation Authority of Zimbabwe (CAAZ) as the regulatory body are at worst prohibitive and at most unsustainable for a tourist destination like Zimbabwe seeking to increase the number of airline carriers. Respondents revealed that from a peak of over fifty airline carriers which used to ply the Zimbabwean airspace the number currently is not even half of that which means there are issues behind which need to be attended to by the concerned authorities since many airline carriers are showing renewed interest to ply the Zimbabwe aerospace. Airline carriers enhance access and even within the country. The sum total of this has been improved connectivity notwithstanding the inadequacy of direct flights with other key source markets. This finding is in agreement with the argument put forth by Crouch (2011) that accessibility is deemed to be of the highest importance in giving a tourist destination a competitive edge. Also as stressed earlier, tourist destinations may have the best mix of attractions but if they are not accessible, they then all count for nothing (Cooper *et al*, 2001; Lookwood and Medlick, 2001, Bhatia, 2001).

Access is therefore critical in enhancing destination competitiveness as it is a key component of the destination amalgam concept without which the destination's core attractions become useless if they are not easily accessible.

Marketing and promotion

Results of the study pointed to significant strides having been made by the national tourism lead agency in seeking to rebrand and reposition destination Zimbabwe by changing the traditional pay off line of Zimbabwe as Africa's paradise to it being a world of wonders. Whilst the marketing and rebranding exercise are commendable respondents conceded that its early days to gauge whether these have had tangible results on the ground save to mention that these initiatives have gained traction among operators, buyers and intermediaries at their inception or roll out stage.

As a result of the rebranding and spirited marketing efforts, arrivals are peaking particularly from the Asian market. This is coming as a good step in the right direction in setting the tone for the recovery of the industry. Increased publicity stunts through various fora in the mould of street carnivals, Tour de Tuli and Mapungubwe have in the short and medium haul helped to put destination Zimbabwe back on the global tourism limelight. There seems to be scope for a lot more to be done on the marketing front since South Africa seems to be outflanking Zimbabwe by employing a wither-withal marketing prowess by even marketing Zimbabwe's tourism flagship, the Victoria Falls, as part of its tourism product catalogue much to the chagrin of Zimbabwean tourism authorities. Zimbabwe's marketing and promotional efforts are hamstrung by lack of adequate budgetary support from treasury due to the continuous shrinking of the fiscal space. Zimbabwe however, fared pretty well on this element as respondents felt that authorities are doing their best in the given circumstances.

Aggregate arrivals

On the arrivals front destination Zimbabwe has got a high approval rate on the strength that it is trailing behind South Africa, and had it not been the presence of other variables which are of political and economic orientation, the country could have been leading by the arrivals' measure in southern Africa. The statistics below confirm that destination Zimbabwe is very competitive on this front.

Destination	2010	2011	2012	2013	2014
South Africa	11574540	12100000	13100000	14860216	15406216
Zimbabwe	2239165	2423280	1794230	1832570	1880028

Source: Zimbabwe Tourism Authority Annual Report 2014, SATOUR

MICE destination

The study established that destination Zimbabwe proudly played host to two of the most prestigious events that were on the UNWTO`s radar, which are, ATA congress and the UNWTO General Assembly. Both these high profile events were held in destination Zimbabwe`s prime tourist resort centre of Victoria Falls. The publicity and media presence in the build up, during and post the successful holding of the events helped to influence and shape the international community`s perception on Zimbabwe. Zimbabwe was therefore endorsed as a premier MICE destination with intact conferencing venues, hospitable people and a very peaceful environment and there is no doubt that in future destination Zimbabwe is guaranteed to host similar high profile mega events.

Human Resources capital

Zimbabwe boasts of well trained and skilled personnel in the field of tourism and hospitality who are capable of delivering service. The increase in the number of tourism degree awarding institutions like Lupane State University (LSU) to address the skills shortage is testimony. Peaceful and literate human resource base capital that is conversant with major international languages like French, Portuguese, Mandarin that are spoken in key source markets help to dismantle the language barrier. This is supported by Mullins (2001), who posited that no meaningful tourism development can take place in the absence of a well skilled human resources. Not only that but also that by its very nature of being a service sector, it is labour intensive, and not just any kind of labour, but labour that is grounded in the tenets of a service culture. On this front Zimbabwe fared relatively well.

Attractions

Destination Zimbabwe is very competitive largely due to the availability of the big five, Victoria Falls, and Great Zimbabwe indexed as world heritage tourism resources which is a big plus on Zimbabwe. Another notable stride in the attractions catalogue was the revival and commissioning of the ancient cities like Matendera, Natalie, and Dhlodhlo which were formerly regarded as ruins, therefore giving the impression that they were of no economic value. Yet these are culturally significant and can be capitalised to develop the tourism sector. These were given a new and exciting nomenclature in line with regional and international trends thus raising a bar for destination Zimbabwe. A well rich catalogue of

mouth watering events like Tour de Tuli and Mapungubwe are worth mentioning in the product development front. Added to this are the traditional tiger-fishing tourney, adrenalin bunji jumping and second to none bush safaris which give destination Zimbabwe a very rich menu of tourism product offerings.

Market perception/image

It was established that Zimbabwe as a tourist destination is still being viewed in bad light despite having the big five, Great Zimbabwe, and Victoria Falls as unique attractions. The negative perception is consequential to the decade long or so of political instability and shortage of basic commodities. The respondents cited the much publicised government's sanctioned land re-distribution exercise in the year 2000 and the in-conclusive 2008 harmonised elections which resulted in a wave of violence, as well as the 2013 national plebiscite that was overwhelmingly won by the ruling ZANU PF party as cardinal factors behind the negative perception. The above did not resonate well with the international community, especially the western countries where the majority of Zimbabwe's international tourists come from. Memories of political motivated violence are still lingering in visitors' mind hence entrenching a negative perception on Zimbabwe. Zimbabwe fares badly on this element since it is still deemed as a pariah state. Prospective visitors still feel neither safe nor secure to patronise destination Zimbabwe owing to the residual memories of orgies of political violence which once occurred in the country. Negative perceptions are therefore casting aspersions on Zimbabwe as the most preferred tourist destination. Perception being the manner in which a visitor view a certain tourist destination either favourable or unfavourable impact significantly on the number of visitors to a tourist destination. This finding is in keeping with what other studies have already established that visitation level increases in those destination that are viewed favourable whilst tourists avoid destination perceived as not safe (Cooper *et al*, 2001, Harrison, 1998).

Respondents further indicated that whilst there has been a significant shift from an outright negative perception about Zimbabwe, international visitors are still concerned about some pockets of political violence or skirmishes between the ruling party ZANU PF and the opposition party. Residual uncertainty is still lingering in the mind of visitors to Zimbabwe. On this front the key source markets are still sceptical about their safety and security if they patronise Zimbabwe. Whilst it can be admitted that following the successful adoption of the new constitution through a national referendum and the holding of harmonised presidential and national assembly elections in 2013 in a general peaceful environment, this somewhat did not marginally improve the source market's perception about Zimbabwe. The country still has the negative image tag firmly intact among the traditional source markets such as the United Kingdom, Germany, France, Canada and the US.

Visa regime

Study respondents bemoaned the congestion and administrative hassles characterising Zimbabwe's entry points much to the chagrin of visitors. Despite the promises by authorities to introduce the much vaunted uni-visa system as a way of addressing the chaotic immigration hassles nothing seems to be changing on the ground. Soon after the formation of the inclusive government in 2009 the authorities that be made policy pronouncements to the effect of forming a customs union by the year 2015, operationalisation of a uni-visa system ahead of the FIFA 2010 world cup however no deliverables were noticed in these fronts now five years down the line after the world cup event.

The irony of Zimbabwe's immigration formalities is that they are rated as the worst by the very same people that destination Zimbabwe clamour for visitation. Visitors complain bitterly about very long border queues and strict immigration requirements, and strongly detest the many road blocks and numerous official security checks which all but puncture the confidence and interest of the visitors. On this front, destination Zimbabwe was found to be uncompetitive.

Pricing regime

Results revealed deep-seated and high levels of concern among international visitors about the high prices charged by various service providers. There was consensus that the pricing system used by all service providers is biased in favour of the local customer yet discriminative and unfriendly towards the regional and international patrons. One respondent described this sad scenario as a paradox in that the international market is touted as the cash cow by destination Zimbabwe and instead of incentivising such a special market, the pricing regime actually criminalise or make it punitive for this market to patronise Zimbabwe by charging astronomical prices. One would have hoped that with the dollarization of the economy the pricing model was to be reasonable fair and conscious of the negative criticism levelled against it.

Differential pricing that saw the Zimbabwe tourism sector over pricing its tourism product has had adverse ramifications on the other anchor elements of the destination particularly image. The astronomical rates levied on regional and international customers have rendered destination Zimbabwe uncompetitive, and not only that but also literally scaring away potential visitors, therefore the destination fared badly on this element. Visitors indicated no intention to return to Zimbabwe but intimated that they would rather substitute Zimbabwe with other regional destinations with comparable and superior tourism offerings that are reasonable priced. Zimbabwe has therefore a very low rating on this element.

Expenditure

Results revealed that the tourism sector in Zimbabwe is punctuated by too much leakages and virtually non usage of a tourism satellite accounting system in the reporting of tourism's economic impacts, and the targeting of the Asian market which has very low on spending patterns. There seem to be a worrying disparity among tourism service providers on the number of people visiting destination Zimbabwe from the Asian market against what is spent by the same. The targeting of the Asian market seem to have been an exacerbating variable in this matrix since the market does not spend much yet it is high volume. High volumes that yield too little revenue are the Achilles heels of the tourism sector since they literally fly in the face of the ideals and precepts of sustainable tourism.

The Asian market has been discredited by local tourism operators simple because customers who come from this market are mostly on group packages. Patrons on group packages negotiate for huge discounts on the hotel rates, and this naturally eats into the revenue. In addition, customers from the Asian market are very low spenders, and cause local tourism operators to have reservations on the Asian market. Finally, most of the groups prefer to use the services of middlemen like tour operators and travel agencies meaning that almost everything is paid for in the home country of origin translating into unimaginable revenue leakages. Destination Zimbabwe therefore is not competitive on this front.

Regulation

Respondents highlighted uncoordinated and ineffective industry regulation by the supreme tourism body. Respondents specifically pointed the continuous mush-rooming of unregistered operators in the sector, discord between the ZTA and operators on the 2 per tourism levy, the stand-off between the ministry of Tourism and Hospitality Industry and the ministry of Finance on the 15 per cent value added tax on tourism services. It was the contention of respondents that if there was effective regulation and policy congruency the above referred to issues would have been resolved for the betterment of the tourism sector. Zimbabwe therefore fares badly on this aspect as well.

Conclusions and implications

This is the first time that this type of research has been conducted in Zimbabwe in the post 2010 period when the present government is rallying behind tourism as the only viable option to placate the country from the worsening economic challenges. The research therefore not only makes a valuable contribution to literature on how best can Zimbabwe project herself competitively on the global tourism market, but could also serve as guideline to practitioners and the national tourism lead agency who can use this information to leverage and guide policy markers so that Zimbabwe is viewed favourable in the eyes of the international visitors by having a clean sheet on the destination competitiveness index. The decision for tourist to visit a destination is a direct function of the destination competitiveness variables. To be precise, tourists' travel patterns and destination choice hinge on these anchor elements. This concurs with Crouch (2011)'s finding that the ease of gaining transportation access into the destination is critical in that where accessibility is difficult like unpleasant airline connections or schedules, the results suggest that destinations would do well if they place considerable emphasis on finding solutions that make travel and entry to the destination much easier.

The dominant variables emerging from this study upon which destination Zimbabwe draws its strengths are attractions, superb human resource capital, impressive arrivals, good physical structures, access, and rigorous marketing. These have conspired to catapult Zimbabwe above its regional peers on the competitiveness index. An inescapable conclusion reached in light of the above is that there is need for the government and private sector to channel more resources to consolidate Zimbabwe's comparative advantage over her regional peers. It appears from the study that destination Zimbabwe has approval ratings on more than half of the anchor elements which implies that it is not yet too late for authorities to decisively act upon the implementation of the universal visa regime and gravitating the pricing model towards being friendlier to international visitors. This could perhaps be accomplished by abandoning an interventionist policy on this highly contentious issue in favour of moral suasion.

Since this study evaluated the competitiveness of destination Zimbabwe using anchor elements, market perception and an over-priced tourism product have been revealed to hold sway in influencing approval ratings by visitors. This finding is consistent with previous studies that analysed the competitiveness of tourist destinations and stress the dominant significance of a destination's image or reputation in the tourism market. A destination's awareness and image is formed and created by many and different forms of information that will eventually shape the perceptions of visitors. Destinations should therefore undertake marketing activities to brand and position a destination (Crouch, 2011). Such initiatives could be in form of familiarisation tours, shooting of videos, documentaries, deploying tourism attachés, and maintaining institutional websites with up to date information.

The recent killing of Cecil the lion in Hwange National Park has received world- wide condemnation from wild animal rights groups and has somewhat dented destination Zimbabwe`s seriousness in conserving its fauna. The killing of Cecil has also created a wall between Zimbabwe and eco-tourists whose source of motivation to patronise Zimbabwe has been assaulted by the demise of the highly revered pet. This demand bold, decisive and result oriented actions to make the necessary corrective measures to the satisfaction of various lobby groups and international wildlife rights groups so that this unfortunate incident does not spiral out of control to the extent of suffocating Zimbabwe`s tourism industry. Cecil was one of the much cherished big five that used to pull visitors to Zimbabwe hence the international outcry over her unfortunate killing is justified. There is need to up conservation efforts and a complete review of the existing trophy hunting permit regime by Zimbabwe`s National Parks and Wildlife Management Authority.

Another implication emerging from the study is that destination Zimbabwe ought to balance the fine line between the newly found Asian tourism market as dictated to by the obtaining political and economic policies, and the so-called traditional tourism markets. The Asian market has to be seriously developed and put in place mechanisms to get the most out of this promising market on the revenue front. This market needs more resources to be channelled towards its development in the long term given the UNWTO`s future projections pointing to the Asia Pacific region as the leading generator of outbound international tourism. One would also need to factor in the World Bank`s pronouncement that China, alongside India and Japan will emerge as the new global economic leaders after the US. This has far reaching implications on Zimbabwe`s tourism landscape hence proper planning and a well orchestrated marketing strategy will definitely give Zimbabwe a head start. Then with the traditional key source markets, these must be seriously re-engaged since they prove to be the industry`s cash cows. Such engagement could be political. Lobbying politicians to tone down political rhetoric and refrain from chastising the western market, the CAAZ could also put a moratorium on levying landing fees on airline carriers from the western market, and also scrapping of visa requirements for nationals from the western market. These markets can be likened to 'low hanging fruit' that can help put destination Zimbabwe`s tourism sector back on track in a very short space of time and with minimum effort on the strength that Zimbabwe`s tourism industry is structurally more suited to this market.

Still there is urgent need to attend to the issue of the inadequacy of direct flights between Zimbabwe and the key source markets. For instance, at the present moment there are no direct flights between Zimbabwe and Europe, neither is there a direct flight between Zimbabwe and the US. This is weighing heavily against destination Zimbabwe. Very poor connectivity. For a very long time the issue has been highlighted by visitors in their reviews about Zimbabwe and there seem to be no movement in terms of addressing this constraint once and for all. Lack of direct flights between Zimbabwe and her key source markets have hindered tourism development and is causing destination Zimbabwe to be rated poorly on the overall perception and easy connectivity index.

The study`s conclusions point to the government of Zimbabwe and tourism players` appetite to increase arrivals and exceed the 15 billion dollar tourism industry projections as envisaged by the Ministry of Tourism by the end of 2015 as the rallying point. A lot therefore needs to be done to address these issues like poor market perception, visa and pricing regimes, poor spending patterns, and ineffective regulation which have been rated poorly on destination competitiveness index. The global tourism industry is forecast to hit the 1.6 billion visitor mark in the year 2020, which is only 5 years from now. Zimbabwe has to claim her share of this market and be counted as a giant not only in Southern Africa and but also in global tourism scheme of things.

The study, however, corroborates the finding by Crouch (2011) that the competitiveness and fortunes of tourism destinations are subject to a very large number of forces, influences and events, and many of these attributes of competitiveness are either impossible or very difficult to manage. A destination seeking to improve its competitive performance would therefore be wise to focus attention and limited resources on those attributes that are likely to have the greatest beneficial impact. The study findings made it abundantly clear that tourism players do not have much control over the country's unfavourable political and economic environment, which ironical impact on the overall perception of the destination. The same can be said on their limited influence on the crafting of aviation policies which seem not to support or lure more airline carriers to address the lack of direct flights. More resources need to be directed towards those anchor elements where the destination has poor ratings instead of thinly spreading the little resources over so many initiatives which do not bring results in the short term. Focus should be on initiatives which yield short and medium term results so that country has a head start over regional competitors.

At policy making level, if access through a single visa is not expedited, then all the collective efforts by private sector and government to increase visitors will remain an elusive goal. Non implementation of such well intentioned policies may sadly mean that the country will not be in a position to meet or attain its goals and will continue to play second fiddle to South Africa. On access, it is high time the powers that be strike a balance between policy pronouncements and action. Otherwise without action, they will merely remain policy pronouncements with no deliverables on the ground. Attending to the high airport departure fees, luring more airline carriers, and bringing finality to the contentious fifteen per cent value added tax on tourism services call for bold and radical move if the super-ordinate goal of realising \$20 billion from this sector is to be achieved. By way of conclusion, further studies are therefore recommended on interrogating the impacts of destination rebranding on the international markets' perception on destination Zimbabwe, and the nexus between destination connectivity and tourist inflows.

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