



The Tourism Sector: A bright light in Zimbabwe`s depressed economic environment

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Abstract

This paper aims to respond to a knowledge gap on an important macro- economic question that has ignited inconclusive debates among investors and policy makers on whether or not tourism can lead to economic development in transitioning economies. The common narrative that tourism is a magic bullet for economic transformation consistently cited by tourism pundits is typically based on speculative and generalised country specific contextual variables. This research paper aims to examine the commonly discussed socio-economic benefits of tourism to provide a richer comprehension of these benefits in the various tourist destination contexts. The study adopted a descriptive-qualitative method through desk research and in-depth interviews with government, local residents, 200 registered local tourism operators and industry expert opinion leaders to probe the economic system-wide impact of tourism in Zimbabwe. Quotations from participants were used to highlight core themes relevant to critical theories of tourism and economic growth. The research results show that the tourism sector contributes over \$500 million into the national economy; supports in excess of 200 000 employees directly; favours massive infrastructural developments; supports conservation of resources, and spruces the image of the country. By examining the economic system-wide impacts spawned by the tourism phenomenon, this paper expands the conversation about tourism and economic growth of which very little has been documented in transitioning economies. Hence, this study, which focuses on Zimbabwe aims to fill this knowledge gap. It is envisaged that the implementation of strategies proffered herein will cause a seismic shift in Zimbabwe`s tourism landscape and economic fortunes.

Keywords- Tourism, economic development, Zimbabwe, ZTA, depressed macro-economic environment.

Introduction

The mainstream travel and tourism industry is the largest contemporary global sector which is making headline news with its fastest rate of growth (WTTC, 2011). At a glance, and at a global level, the tourism sector in 2016 in total generated \$7.6 trillion, which is 10 per cent of global GDP and some 292 million jobs equivalent to 1 in 10 jobs in the global economy. The tourism industry in fully industrialised economies is well known for its potential to generate revenue, job opportunities, spurring economic transformation, and supporting infrastructural development (Chou, 2013; Arezki *et al.*, 2009; Oh, 2005; Creaco and Querini, 2003; Dwyer, 2000). Factually, the Zimbabwean economy relies upon three key sectors in the mould of agriculture, mining and tourism (ZTA, 2017, Ministry of Finance and Economic Development, 2017). Thousands of employment opportunities and other downstream industries are intricately interdependent with tourism growth.

Lee and Chang (2008) posited that tourism development stimulates the growth of the industry as well as influencing economic growth. Informed by such empirical findings, many countries are frantically promoting their tourism sectors as a strategic economic development option capable of eradicating poverty, and giving hope to the economically and socially disadvantaged. Economic pundits like Brau *et al.*, (2003) and Eugenio-Martin *et al.*, (2004) stress tourism`s far reaching economic ramifications on national economies



manifested through an increase in incomes, revenue in central government coffers through multiplier effects, support in balance of payments, and promotion of downstream industries directly and indirectly linked to the tourism sector. Oh (2005) and Lim (1997) advocate for sustainable tourism development that contributes favourably to national economic growth. Therefore, a surgical analysis in the form of this kind of research is imperative for such countries that have set on the path of embracing tourism as part of their national economic development agendas.

Zimbabwe is well resourced with a tapestry of tourism resources whose economic potential have not yet been realised. The country boasts of a hospitable people, and intact tourist attraction centres with a relatively good global appeal, which is a sound base to develop a robust tourism industry that can drastically change the economic landscape and fortunes of the country in a short space of time. In government policy documents and official policy enunciations, the government of Zimbabwe conceded that tourism is the only sector that can quickly extricate the country from the current clutches of foreign currency shortages and high unemployment rates in the formal job market. The sector has been regarded as having low hanging fruits that can provide a respite for the myriad of economic challenges currently bedevilling the country. At this juncture, McKinnon (1964)'s argument that the tourism phenomenon brings the much needed foreign currency that can be employed to import capital goods, which can subsequently be used to produce goods and services, that in turn leads to economic growth is quite instructive. In contemporary Zimbabwe, the tourism sector was estimated to be worth half a billion in the year 2016, and is envisaged to contribute some \$5 billion to the national coffers by the year 2020. Thumb sucking figures have been thrown around relating to the economic contribution of this delicate sector to the national economy. Currently, Zimbabwe is ranked number 167 according to the tourism competitiveness index, which is a tall order for Zimbabwe authorities to develop the industry to the desirable world rankings.

With hindsight, Zimbabwe has always been riding on the back of the so called traditional western markets which saw the steady growth of the sector since 1980 when the country attained political independence from Britain. In the period 2017, tourism traffic inflows into Zimbabwe were slightly above 2 million (ZTA, 2017). Foreign currency receipts were argued to have dipped to about \$176 million. A further break down of tourist inflows showed that western markets led in terms of generating tourism demand, the South Africa market is also on the rebound whilst there is a significant slump in the Asian market. On the foreign currency receipts the traditional markets remain by far the major markets, with high spending patterns albeit a comparatively low average period of stay.

Background

Tourism situation in Zimbabwe: Current dashboard

A major highlight of tourism development recently has been the refurbishment of the Victoria Falls airport facility. The Victoria Falls International Airport facility has been hailed as a vital cog in the revitalisation of the country's tourism sector. The recent refurbishment of the facility has breathed a new lease of life to the resort town and has gone a long way in giving a new face to Zimbabwe. The resort town of Victoria Falls is really the country's prime tourist destination, and rightly so the face of destination Zimbabwe. Tourism has thus been put on the top of government's development priority list upon the realisation that it can play a magical role in the economic revival agenda of the country. The Ministry of Tourism and Hospitality Industry (MoTHI) has come up with a development model which is unpacked as an ambitious target to increase tourist arrivals from the current level to 5 million tourists, which would yield or generate some gigantic \$5 billion in foreign exchange by the year 2020. That is quite a feat given that the current national budget is only \$4 billion, and also given



that the country is within a shouting distance to the year 2020. Another milestone worth mentioning in Zimbabwe's tourism terrain is the tourism master-plan that is being crafted by the ministry. Essentially, this is the nucleus around which the tourism policy will be implemented and is envisaged to give concrete direction regarding the tourism development trajectory.

The country is building up its tourism infrastructure despite years of economic downturn. The same resilience depicted by the tourism sector is on show in the country's conservation efforts currently underway, evidenced by a spirited clamp down on poaching and a flourishing biodiversity in the country's nature reserves. Zimbabwe is rich in traditions, history, art and cuisine but is still suffering from disinvestment, high poverty rates and deterioration in the provision of amenities and other social services. Zimbabwe has an abundance of tourism resources that it can bank on to stimulate economic growth and alleviate poverty (ZTA, 2016).

In an increasingly globalised world, the fierce competition among nations for foreign direct investment (FDI) and tourist dollars has encouraged planners and policy makers to concentrate their efforts on sharpening the advantages of their countries' culture and tourism resources. Zimbabwe is undergoing rapid economic and political developments and is faced with a dilemma to respond quickly to these changes, and to find resources in support of such efforts. In recent years, the government adopted tourism development as a way to diversify the economy.

There are a number of plausible reasons as to why the government of Zimbabwe (GOZ) believes tourism development is an appropriate means of accelerating economic growth. These are, firstly, the observation that globally the tourism sector is growing exponentially with news bulletins from world tourism bodies like United Nations World Tourism organisation (UNWTO), World Travel and Tourism Council (WTTC) optimistically indicating that by 2020, tourists will have hit the 1.6 billion mark making the sector a multi-trillion dollar industry.

Secondly, the tourism sector is growing at a much faster rate than fuels, telecommunications, and other sectors of the economy combined.

Thirdly, mineral and agricultural prices are continuously fluctuating at the world market.

Fourthly, Zimbabwe has historical ties with the west, and has cordial relations with the East. The East is increasingly becoming the future leader in terms of tourism demand at global scale. Additionally, tourism has linkages to other sectors of the economy.

Tourists consume goods and services that have direct linkages to farming, construction and other services (Sharpley, 2002). Tourism utilises free natural, cultural and heritage resources that do not need extensive infrastructure support as noted by Sharpley (2002). Finally, there are no trade barriers in tourism and there is general peace and tranquillity in Zimbabwe and it also has hospitable people.

Sharpley (2002) posits that tourism's contribution to economic development has been recognised since the early 1940s, however it was only in the late 1960s when governments in the developed and developing world began to vigorously pursue tourism policies as a means of achieving economic growth and diversification. The UNWTO forecasts that a total of \$2 trillion in global GDP and 305 million jobs will be generated by the tourism sector in 2020. Today, tourism has become an integral element of economic development policy in most countries, and tourism has become the world's largest industry. Harrilli (2004) confirms



that tourism has become an important component of economic development programmes around the world.

In recent years, Zimbabwe has experienced economic and social hardships due to a decline in economic activity in the country and recurrent droughts induced by climate change. To mitigate the economic difficulties, the GOZ has adopted tourism as a new economic development strategy. This is buoyed by the fact that tourism is traditionally associated with economic, environmental and socio-cultural benefits which can contribute to the revitalisation of communities and enhancement of people's quality of life (Kuvan and Akan, 2005; Andereck and Vogt, 2000).

Study rationale and theoretical contribution

The study was necessitated by an observation made by the Overseas Development Institute that rigorous, empirical national and global level analysis of tourism's economic and poverty alleviation impacts is lacking, but none the less it is clear that the industry is having substantial impact on local people and local economies in many developing countries. The current study will therefore contribute to the relationship between economic development and the tourism development process. Countries can be different in terms of the weight of tourism on their overall economies (Oh, 2005), the size and openness of the economy (Kim *et al.*, 2006); and products capacity constraints (Dwyer *et al.*, 2000), and the tourism-economy relationship can also differ from one country to another, hence the current study. Several figures have been thrown around justifying investment in the tourism sector without empirical research in Zimbabwe, and the current study is one attempt to address this. The current study therefore seeks to expand on the single country study dimension in the context of Zimbabwe's new economic order, underpinned by the new political dispensation. Will it change the narrative? There has been renewed vigour in Zimbabwe to prioritise tourism development coupled with political will. Another observation from the tourism and economic development discourse is that findings from previous studies have largely been inconclusive while others have been mixed. This therefore calls for a further debate on the efficacy of tourism in relation to economic affluence. This is envisaged to deepen the comprehension of country specific circumstances that may accelerate or impede the full realisation of opportunities and benefits that come along or accrue with tourism development.

Literature review

The tourism sector in Africa has witnessed the number of international tourist arrivals increasing by 8 per cent to reach 58 million in 2017 (WTTC, 2017). The 58 million tourists coming to mainland Africa represents some 5 per cent of the 1 billion global tourists. Therefore, there is huge potential for Africa to up its market share and compete against most advanced economies if the region is to meaningfully gain from tourism trade.

Tourism has been credited as a peace builder and can be used to resolve conflicts where these exist. The globe is plagued by much political and social unrest. Countries can therefore ride on tourism to maintain peace and tranquillity at global level which is vital for economic prosperity. Over the past several decades, the relationship between tourism spending and economic growth for both developing and developed countries has been extensively researched (Chou, 2013). The WTTC (2011) weighed in to say that tourism would continue to be one of the world's largest industries, in 2011, it contributed 9 per cent of global GDP, a value of \$6 trillion, and accounted for 255 million jobs. Over the next ten years, the industry is expected to grow by an average of 4 per cent annually.

Authoritative tourism global bodies and agencies are in agreement that growth in the travel and tourism industry outpaced that of the global economy and the outlook for the industry



remain robust and bullish, and will continue to be at the forefront of wealth and employment creation in the global economy (Dwyer *et al.*, 2004). This is despite the emergence of a number of challenging headwinds like terrorism, global financial depression, disease outbreaks, and political instability. In light of the preceding, it is crystal-clear that the travel and tourism sector is increasingly becoming more and more significant not only as an engine of economic development and but also as a vehicle for sharing cultures, creating peace and building mutual understanding amongst nations (WTTC, 2017). The importance of the tourism sector as an economic activity in most countries around the world cannot therefore be over-emphasised. Its direct economic impacts coupled with its induced impacts cannot be ignored by policy makers and planners.

It is not debatable that the tourism industry has emerged as one of the leading service industry in the global economy in recent decades. Oh (2005) highlight that modern tourism has become a key driver for socio-economic progress through the creation of jobs and enterprises, infrastructure development and the export revenue that is subsequently earned. The contribution on the world wide economic activity is estimated at some five per cent while its contribution to employment is estimated in the order of seven per cent of the overall number of direct and indirect jobs world-wide.

The importance of the tourism sector can be understood further basing on statistics from the WTTC. The insight given by the WTTC is that the industry's direct contribution to GDP in 2010 was \$1.770 billion, and it created 3 million direct jobs. Combing through the literature of Kim *et al.*, (2006); Lee and Chang, (2008); and Kreishan, (2010) one would realise that the subject of tourism and economic growth has been a trendy sphere of research. However, what is conspicuous in the literature discourse are two broad categories of studies, which on one hand are country-group narratives and on the other hand are single-country narratives. The works of Balaguer and Vantavella-Joral, (2002); and Durbarry, (2004) attest to this. Durbarry (2004) established that tourism is more relevant in small countries like Zimbabwe that relies upon subsistence agriculture, and extraction of minerals, where it can be a game changer.

The role of tourism in sustainable development

Tourism for many countries is seen as a foremost instrument for regional development, as it arguably stimulates new economic activities. In terms of the theory of development, tourism fulfils three cardinal objectives namely economic, social, and ecological. Economic objectives entail growth, efficiency, and equity; social objectives revolve around local people's empowerment, participation, social cohesion, cultural identity, and lastly, ecological objectives relate to ecosystem integrity. The attaining of the above outlined objectives guarantees sustainable development. Pearce (1991) classified the socio-economic effects of tourism on the national economy as balance of payment. For many nations tourism is often the main source of foreign exchange earnings. On regional development tourism frequently spreads economic activities more across the internal borders of a particular country. On the aspect of diversification of the economy, tourism due to its multi-faceted nature may foster the build up of solid economic development. On income levels, tourism enables the country to earn revenue due to tax collection and foreign currency receipts. There are a whole lot of employment opportunities an in most countries tourism has become an important source of employment especially for the unskilled and semi-skilled labour force. However, it has been argued that the effects of tourism on the socio-economic front of the country vary from one country to another, and are a function of local tourism promotion and marketing strategies, a wide set of circumstances and the tourism life cycle.

Ashley *et al.*, (2007) opined that tourism's current role in expanding economic opportunity in developing countries presents a paradox that should be solved. There has been



unprecedented growth in the attention paid by policy makers, development experts and industry leaders to the contributions made by the tourism sector in many countries, especially the developing world. However, what is clear and evident is that tourism in partnership with local communities has managed to bring economic prosperity to remote areas, for example, Binga and Mahenye areas in Zimbabwe. Tourism is also beneficial at a local level as it comes with benefits through local business linkage initiatives like training community tour guides and local tourism workers and providing health care services and education progress to surrounding communities.

To date, extensive data and literature point to the particular and growing importance of tourism in developing countries. The UNWTO estimates that tourism in advanced and diversified economies contributes between 2 and 12 per cent of GDP, and 40 per cent of GDP in developing economies, and up to a whopping 70 per cent of GDP in small island economies.

International evidence shows that tourism is more labour intensive than other non-agricultural sectors. It also uses a relatively high proportion of unskilled or semi-skilled labour (Jonathan and Faal, 2006). As agricultural systems decline, tourism may also offer rural people an alternative to unemployment or migration to urban areas (Ashley *et al.*, 2007). Indirect effects of tourism also occur through the tourism value chain since tourism draws on inputs from the food and beverage, construction, transportation, furniture and many other sectors. Arezki *et al.*, (2009) and Brau *et al.*, (2003) extensively researched on tourism and economic growth, and concluded that tourism countries grew significantly faster than all the other sub-groups considered in the analysis.

Methodology

Data was collected through in-depth interviews with representatives drawn from the three clusters of the tourism industry after ethical issues were attended to. This was also supplemented by desk research, industry expert opinions and data from 200 registered local tourism operators to examine economic system-wide impact of tourism in Zimbabwe. The three clusters of the tourism industry were government, operators and local community residents. The use of tourism official policy documents, authoritative industry voices, tourism operators, and local residents guaranteed equal representation amongst tourism's key stakeholders. Respondents representing the three main clusters of the tourism industry; government, private sector and the local community residents were examined on their interpretation of the current development of the tourism industry in Zimbabwe. Approximately 50 participants took part in the interview process to form a diverse sample, and these were purposively selected. This target sample size was selected, as it was a realistic number to achieve saturation from interviews (Patton, 2002). The interview was semi-structured to allow some leeway for respondents to go beyond the specific questions and also to identify other relevant issues at hand, which could further enrich data collected from the interviews (Maxwell, 2005). Thematic content analysis was used. Thematic content analysis was deemed an appropriate method to make inferences about the views of individuals and groups, and as such was selected as a beneficial technique. Thematic content analysis used the break-down of text into themes to indicate what content exists according to pre-determined thematic areas (Krippendorff, 2004).

Results and discussion

The findings of the study were analysed following the dominant themes that emerged during the data collection process. The main themes were: international export income, resilience of the tourism sector, employment opportunities, and image building, infrastructural development, and conservation of resources. The findings and the discussion thereof are presented below.



International export income

Results showed that in the year 2016-2017, the tourism sector in Zimbabwe gathered in \$157 million worth of foreign export revenue earnings. This translated to 10 per cent of the country's GDP. Respondents further intimated that in the year 2020, the sector's foreign exchange earnings will even increase more to top \$5 billion riding on the back of favourable international arrivals that are projected to reach 5 million. The export earnings meant a great deal for Zimbabwe that is currently in the jaws of crippling foreign currency shortages which have caused intermittent economic grid lock. Authorities are fond of referring to the present scenario as 'liquidity crunch', which is exacerbated by very low productivity in the various sectors of the economy and sub-optimum capacity utilisation. Respondents were unanimous that the tourism sector is the panacea to the foreign currency shortage as it is helping to stabilise the balance of payment account. The tourism sector was revered as a quick solution to the huge premiums that are being charged in the booming but illegal underground parallel market where most business entities resort to in order to get the increasingly elusive foreign currency. Consequently, this has had a domino effect on prices of commodities that are soaring to new heights driven mainly by the fact that most companies source foreign currency from the underground parallel market.

There was convergence among economists, captains of industry, central bank officials, financial market analysts and government officials that the tourism sector in Zimbabwe has huge potential to quickly ameliorate the foreign currency challenge dogging the country. It is the only economic sub-sector that is showing positive signs of expansion and growth at a time when most economic sectors are contracting or heading south. With increased appetite for foreign exchange to import and stock medicines in hospitals, as well as recapitalising most productive sectors that have endured close to two decades of de-industrialisation, the sector is increasingly emerging as the only available line of defence for the country.

What is instructive for Zimbabwean authorities is to plug out revenue leakages through management contracting fees, franchise royalties and see to it that they increase the average spending of visitors. In essence, the uptick in international tourism traffic should also result in a corresponding increase of foreign currency realised. This is the challenge that Zimbabwean authorities need to address as a matter of urgency. The Reserve Bank of Zimbabwe (RBZ) challenged the tourism sector to exploit its full potential and increase its contribution to the national economy. The RBZ governor is on record imploring the sector to contribute 20 percent to the GDP in 2018. At the moment the RBZ chief praised the role played by the sector by contributing 11 per cent to the GDP. The results revealed that the Zimbabwean economy in 2017 earned a total of \$5.5 billion. In 2016, the sector generated \$177 million, which was about 6 per cent of the total exports proceeds in Zimbabwe.

In view of the above, the tourism sector becomes the fourth most reliable source of foreign currency for Zimbabwe in addition to other sources of foreign currency earnings coming largely from remittances from the Diasporas, international remittances and loan proceeds. The country has a debt legacy hang over with international financial lenders. The country's external debt to date is in excess of \$10 billion to international financial institutions namely the International Monetary Fund (IMF), World Bank (WB), Paris Club, and the European Investment Bank, and African Development Bank (AfDB). The study finding dovetails with the argument put forward by Eugenio-Martin, *et al.*, (2004: 5) that tourism is a "...driver for economic growth in medium or low income countries, though not necessarily in developed countries".

Findings further validate the perspective given by Dwyer *et al.*, (2004) wherein they recognised tourism as having an impact on economic activity. This also conforms to what Khan *et al.*, (1955); Lee and Kwon, (1995); Lim, (1987); and Oh, (2005) posited that the



speedy growth of tourism cause an increase in household income and government revenue through multiplier effects, improves BOP and growth in the number of tourism promoted government policies, as such, the development of tourism has usually been considered a positive contribution to economic growth. Tourism has had a positive economic development impact on the balance of payments, on employment, on gross income and production in many countries, a finding similar to what was established by Creaco and Querini (2003).

Resilience in face of economic and political down-turn

Findings revealed that ever since the tourism sector started to develop in Zimbabwe in earnest in 1980, tourist arrivals have been increasing quite steadily in tandem with the global trend. With the ushering in of political independence in 1980 from Britain, visitors to Zimbabwe peaked to unprecedented levels buoyed by the euphoria associated with political peace prevailing then. In the early to mid 1980s, some political upheavals rocked the country necessitated by the fall out between the two major liberation political parties, that is, Zimbabwe African National Union, Patriotic Front (ZANU PF) and Patriotic Front, Zimbabwe African People`s Union (PF ZAPU). It is this era that is documented in the annals of history as the Gukurahundi period, which impacted adversely on the country`s political and economic landscape. Despite these disturbances or instabilities, the tourism sector remained bullish defying the odds. Statistics maintained a health upward trend to a peak of 2 million by the close of the first decade.

There was exponential growth from the early 1990s to late 1999 by which time the GOZ embarked on a national land re-distribution exercise wherein prime land was re allocated to the landless majority black people from the minority white people. This exercise did not sit in well with Britain and other western countries who interpreted it as retributive and reverse segregation. The resultant stand-off between Harare and the United Kingdom (UK) gave birth to economic sanctions or restrictive measures against Zimbabwe, isolation, and unavailability of credit lines for Zimbabwe from the international financial institutions. The tourism sector managed to survive even the ostracisation of Zimbabwe in the mainstream international media houses. It even weathered the adverse travel advisories that had been issued by the international community against travel to Zimbabwe. The Asian market came quite hand to bridge the gap during this period, courtesy of the Look East Policy that the government had already set in motion.

In early 2000, the birth of a huge political party the Movement for Democratic Change (MDC) materialised, backed by labour in Zimbabwe`s body politic. The subsequent endless political contestation between the ruling ZANU PF and opposition MDC regarding election results, and human rights issues further strained the relations between Zimbabwe and western countries traditionally touted as models of democracy. Crippling economic and political challenges became the order of the day in Zimbabwe characterised by the unavailability of gasoline, basic commodities, hyper inflation, job losses due to company closures, and an exodus en masse of the Zimbabwe`s productive age groups to South Africa and UK. The tourism sector was resilient due to the historical ties between Zimbabwe and Britain. Due to international goodwill tourism traffic is still increasing and authorities need to translate the statistics into revenue that can meaningfully have an impact on the national purse. This finding is consistent with what industry experts and writers (Chou, 2013; WTTC, 2011, and Oh, 2005) who observed that despite the ever increasing and unpredictable shocks from terrorist attacks and political instabilities, to health pandemics and natural disasters, tourism continued to show resilience, contributing direct GDP growth and supporting millions of additional jobs in the sector world-wide .



Employment opportunities

Results revealed that one in every four people is employed directly or indirectly in the tourism sector in Zimbabwe at the present moment. Additional insights were also given by respondents indicating that at its peak, the sector employed no less than 200 000 people directly. This finding is consistent with official figures of people employed in the tourism sector (ZTA, 2016). The result is also similar to what Nijkamp, (1998); Sinclair, (1998), and Neto, (2003) regard as a labour intensive sector whose success hinges on hiring of both skilled and semi-skilled personnel. Zimbabwe like any other developing country is facing a challenge of high unemployment rate particularly in the formal sector.

Respondents pointed out that the tourism sector provides 'quick jobs' in *inter alia* tour-guiding, travel agency operations, national tourism organisations, hotels, lodges, restaurants, national parks, publicity organisations, airlines and training institutions. This is over and above employment opportunities that are generated in down-stream industries. Despite the fact that most jobs are menial and seasonal, the sector somehow alleviates the unemployment scourge that the country finds itself in. Some respondents bemoaned that tourism jobs are ephemeral and low profile occupations without necessarily discounting the sector's capacity to generating jobs. However, the consensus was that the job opportunities bring a dollar on the table for people, in the face of increasingly dwindling or elusive job opportunities in Zimbabwe's formal sector. What matters most however, is that the man in the street is really not concerned about those white collar jobs that come along with high salary figures and attendant perks when in actual fact chances of getting such jobs are next to nothing given the non-performing economic environment. A menial job that is readily available guarantees 'bread on the table' and that is what matters the most. The tourism sector provides just that. This finding further vindicates the works of Ekanayake and Long (2012) who established that the tourism sector has become increasingly vital to many developing countries as a source of revenue as well as a source of employment for local people.

Image builder-brand image and international relations

Respondents intimated that tourism is a peace sector that fosters peace and good international relations among nations. Results further showed that tourism help to build international good will and help shape perceptions about the country. Respondents outlined that tourism can project a country as good foreign direct investment destination, tourism enable visitors to have first hand information on Zimbabwe that is unadulterated, information which enable them to better appreciate the culture, available business and investment opportunities, and that tourism help in cementing kinship ties. Reflecting on these findings, mindful of the nature of tourism as a global phenomenon, and taking place in a global space it proves beyond doubt that cohesion between and amongst nations is entrenched, helping countries to foster social, cultural, political and economic ties at bilateral and multilateral levels resulting in peace globally.

The image of a country is critical in the international arena. A positive country image is very important for FDI, and strategic marketing for export companies. There is an extensive discussion of image in the literature, of note are Barich and Kotler, (1991) who explained image as the sum total of beliefs, attitudes, and impressions that a person or group has of an object and impressions may be true or false, real or imagined. Image can also be understood as the totality of impressions, beliefs, ideas, expectations, and feelings accumulated towards a place over time by an individual or group of people as posited by Kim and Richardson, (2003), whilst Castro *et al.*, (2007) elucidated image as an interactive system of thoughts, opinions, feelings, visualisation, and intentions towards a destination. The foregoing speaks volumes on the importance of destination image such that countries

that seek to develop their tourism sectors must be wary of organic images which are formed by individuals themselves through past experiences with destinations, and unbiased sources of information like news, reports, newspaper articles, and movies. On the other side of the continuum, countries should also be wary of tourists` induced images that are essentially created through information received from external sources, including destination advertising and promotion (Gun, 1972). In the case of Zimbabwe, the Zimbabwe Tourism Authority (ZTA) provides information about tourist attractions which cause visitors to have organic images. Then, there are other international media houses like Cable News Network (CNN), British Broadcasting Corporation (BBC), Sky News, France 24 and other related publications outside the purview of ZTA whose news reportage can cause tourists to have induced images about Zimbabwe.

Staying with this line of argument, Zimbabwe destination authorities should therefore be mindful of the various attributes of destination image, which in the context of Zimbabwe encompass scenic environment, a sea of natural attractions, prices charged, climate, variety of tourist activities, entertainment, facilities, national parks, local infrastructure, transportation networks, architecture or buildings, historic sites, museums, shopping facilities, accommodation facilities, festivals, carnivals, exhibitions, cleanliness, safety, economic development and affluence, accessibility, political stability, receptiveness and different cuisines. All these collectively and individually influence destination image. Each and every nation should have a favourable brand. Tourism helps to project a nation`s brand image, and Zimbabwe is currently seized with the process of rebranding the nation, and the tourism sector is better placed to spear head such a delicate process since one cannot separate the nation`s brand and its tourism offerings.

Infrastructural development

Results revealed that the tourism sector assist in the development of infrastructural facilities even in areas which could have been left underdeveloped. Respondents enumerated such infrastructural facilities like tarred access roads, tapped water, ablution facilities, entertainment venues, sporting facilities, airports, banks and other social amenities which are a pre-requisite for the tourism sector to take off. Massive infrastructural roll out or development is a must before earnest tourism development can take place. In essence, in and around an attraction or tourism resource for it to be accessed and utilised there is need for access roads. Significant infrastructures that were cited by respondents to have been inspired by the tourism sector were the construction of the Robert Mugabe International airport, refurbishment of the Plumtree - Mutare highway, and the recent renovation and subsequent upgrading of the Victoria Falls International airport, and the envisaged dualisation of the Beitbridge-Harare-Chirundu highway to enhance the accessibility of the country. "The new look airport in Victoria Falls is capable of welcoming 1.5 million a year, and that is good news for the tourism sector." quoted one travel consultant with tour operating business in the resort town of Victoria Falls.

Respondents were upbeat that the Victoria Falls Internation Airport is now capable of smoothly handling around 1.5 million passengers per year up from 500 000, whilst others insinuated that Victoria Falls accommodation facilities` occupancy levels have been above 90 per cent since the commissioning of the new airport facility. Respondents also stressed that facilities like airports, banks, and a host of other amenities that are put in place in order for the tourist centre to appeal to visitors, can equally be used by local communities, like the case for Chinotimba residents in Victoria Falls and Mahombekombe and Nyamhunga in Kariba. In the final analysis, the tourism sector stimulates infrastructural development; examples abound to this effect in the mould of Buffalo Range aerodrome used to access



Gonarezhou in the lowveld, and Kariba aerodrome to make sure that all tourist attraction centres are easily accessible.

Preservation of resources

Respondents pointed out that the tourism sector justifies the conservation of Zimbabwe's man-made and natural finite resources upon which the industry depends. This finding is in line with what was established by Ashley and Elliot (2003), Creaco and Querini (2003), and Valente (2005), in that the environment is important for tourism and hence must be preserved. It was highlighted that since the country realises significant revenue from tourists who visit such resources then there is every reason to look after these resources so that "...the continue to benefit in terms of foreign exchange and employment opportunities" quoting one Chinotimba resident in Victoria Falls. To this effect, Zimbabwe has made strides in preserving tourism resources ranging from local culture, flora and fauna especially the big five, fighting poaching, protecting the endangered species, cultural heritage and museum sites like Great Zimbabwe, and Victoria Falls which are protected by the United Nations Educational Scientific and Cultural Organisation (UNESCO).

The monetary and employment benefits derived from these tourism resources at both community and country level makes it imperative to preserve the same. If these resources are not properly conserved and are mutilated then in future no tourists will visit Zimbabwe and the country will lose out on vital monetary and job opportunities for national sustainability. It is no coincidence that Zimbabwe is a signatory to international conventions like the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) to ensure that it protects the flora and fauna, which is the bed rock of the tourism industry. The finding that tourism results in people conserving resources is in sync with key discussion points of the Johannesburg Summit in 2002, wherein tourism was identified as one of the few sectors of the economy capable of promoting economic incentive for the preservation of the environment (UN, 2002). Without tourism resources, then there is no tourism to talk about. Visitors' interest to come to Zimbabwe is aroused by the availability of such tourism resources hence the need to preserve them cannot be over emphasised.

Conclusion and implications

At the present moment the tourism sector's performance is not mainstream enough to contribute the envisaged \$5 billion to the national economy in 2020. The study concludes that there was no significant relation between tourist arrivals and amount of foreign currency generated. Whilst tourist arrivals have been increasing there was not a corresponding increase in the foreign currency realised. This has implications to tourism operators, the national tourism organisation (NTO) and government to look into the spending patterns of tourists, their average period of stay, and product offering mix as these could account for the mismatch. Therefore, it is incumbent upon the authorities to devise strategies to up the average period of stay, customers' spending patterns, and expand on the product mix.

On the marketing and promotion front, the implication would be for a national lead agency to streamline and focus or target the high spending market segment as opposed to low spenders. An appraisal may be necessary between the western market and Asian market to ascertain the high spending market and focus on that. Another implication is that as a country there is need to interrogate the use of tourist arrival figures as a measure of the good performance of the tourism sector ahead of using tourist expenditure as an accurate indicator. It is the contention of the writer, informed by the study findings, to use tourist expenditure as an accurate measure of the success of the tourism sector as opposed to traffic or arrivals, since tourist expenditure reflect the economic value of tourism. This speaks to the tried and tested Pareto system whereby the country should lure the 20 per



cent of the global tourism market that would yield 80 per cent of the profits. This is also in line with international best practice of sustainable tourism. The obsession of destination authorities to have an avalanche of tourist arrivals without a corresponding increase in expenditure smacks of mass tourism, which could be an 'Achilles heel' leading to the demise of the tourism sector in the long term.

Yet another implication drawn from the study findings is that the environment, in the form of tourism resources, is an extremely important input for tourism. Therefore, there is economic logic in the national budget to commit adequate financial resources that should be invested in environmental protection initiatives. This may call for setting a fund dedicated to this cause instead of relying upon external donor funds. Quasi government institutions like the Environmental Management Agency (EMA), ZTA, Zimbabwe Investment Authority (ZIA), Ministry of Environment and Climate Change, MoTHI, and Zimparks must come up with a national policy on environment protection and even create incentives for environmental protection which is beneficial for tourism and economic development. Mounting of local and national educational programs meant to heighten or conscientise the need to preserve the natural resources may be necessary.

The final implication is on political office bearers. By its very nature, tourism compels political leaders to institute or establish sound systems of national governance, and to grant more civil liberties, so that the country is viewed favourably by the international community and this further opens the country for international trade, particularly for developing countries that face barriers in international trade. Literature indicates that in developing countries tourism should contribute up to 40 per cent of the GDP and this implies that the 15 per cent that tourism is currently contributing to the Zimbabwe's GDP is well below the sector's potential. There is thus a need to double up efforts and get as much toward GDP as possible. The above outlined implications should be a wake-up call for all tourism stakeholders. They call for the need for more lateral policy scope, without which the tourism development path becomes an uphill task and is not sustainable

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