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The draft national tourism strategy in the context of destination image recovery in Zimbabwe

Kanokanga P. F.*
Email: fpkanga@gmail.com
Tukuta, M., Chikuta, O and Ndoda, G. R.
Chinhoyi University of Technology, Zimbabwe

Corresponding author*

Abstract

This paper sought to carry out a comparative assessment of the Zimbabwe Draft National Tourism Sector Strategy (DNTSS) while adding insights drawn from desk research and a doctoral study whose aim was the development of a destination image (DI) recovery model for enhancing performance of the tourism sector in Zimbabwe. The DNTSS and the doctoral study coalesced on this overarching objective of achieving DI recovery so as to enhance the economic performance of Zimbabwe's tourism sector. While data for the two researches was collected almost simultaneously, the key findings were not the same. The doctoral research, using a mixed methodology, revealed that a poor image contributed significantly to the decline in tourism's economic performance while the DNTSS was silent on the cause. Data was collected from various locations from a sample of 311 comprising international tourists, tourism and hospitality service providers and key informants. A structured and semi-structured questionnaire as well as a semi-structured interview guide were used respectively to collect data for the doctoral study while stakeholder consultations were used for the DNTSS. The doctoral study revealed that there was need for Zimbabwe to implement political and economic strategies and to analyze the tourism value chain with a view to have competitive prices and turn around DI. The study recommended that in the DNTSS, the market could be divided into distinct components such as core markets and investment markets. It was also crucial to invest in tourism research and grow arrivals from markets with under-tapped potential such as African source markets and parts of Asia/Pacific. It was felt that the views of the villagers and international tourists could have been incorporated in the DNTSS. The study's implications were that political strategies needed to be complemented by other strategies in order for the national tourism strategy to be more effective and also that the principle of inclusivity and diversity was central in DI recovery.

Keywords: National**,** Tourism, Strategy, DI Recovery, Zimbabwe

Introduction

The Travel and tourism industry is one of the fastest growing economic sectors in the world (UNWTO, 2015). Globally, the sector contributes 1 in 10 jobs and US$1, 6 trillion in exports, which is equivalent to 7 per cent of the world's exports and 10 per cent of the world's GDP (UNWTO, 2018). International tourist arrivals grew by **7%** in 2017 to reach 1.322 billion. The growth in arrivals was expected to continue in 2018 at a rate of 4%-5% (Zimbabwe Tourism Authority, ZTA, 2017). In 2017, the travel & tourism industry continued to make a real difference to the lives of millions of people by driving growth, creating jobs, reducing poverty and fostering development and tolerance (World Economic Forum, (WEF), 2017). Thus, the travel and tourism industry is a very important industry. It therefore requires urgent attention when things are not right and generally needs to be well looked after owing to its importance to national economies. Its importance also demands that governments invest time, money and other resources to ensure that their countries are competitive tourist destinations. In tourism, a strong DI (DI) tends to be associated with a sound performance of the tourism sector and destination competitiveness (DC) (Hanafiah, Hemdi and Ahmad, 2016). Gallarza, Saura and García (2002: 59) claim that "there are almost as many definitions of image as scholars devoted to its conceptualization". DI refers to a total sum of beliefs and impressions about the destination derived from various sources of information over time (Xu, Elaine and Pratt, 2018). It is also defined as "a compilation of beliefs and impressions based on information processing from various sources over time that result in a mental representation of the attributes, benefits, and distinct influence sought of a destination" (Zhang, Fu, Cai and Lu, 2014: 215). This definition recognizes not only the dimensions of image (that is, cognitive and affective) but also the formation process of a DI by the interaction between these components. However, this study used Crompton's (1979) definition which regards DI as the sum of all those emotional and aesthetic qualities such as experiences, beliefs, ideas, recollections and impressions, which a person has of a destination. Image recovery is often used to mean the same as "reputation repair", "reputation management", "image restoration", and "recovery marketing" (Avraham and Ketter, 2016). It refers to the efforts to repair the reputation of organizations, companies, brands, and related entities. In this study, the term image recovery refers to the process of strengthening the image of Zimbabwe as a tourist destination resulting in a significant improvement in the performance of the country's tourism sector. Strategy on the other hand gives the tourism sector direction, scope and a competitive edge. Strategy is defined by Johnson, Scholes and Whittington (2008) as the direction and scope of an organization over the long term, which achieves advantage in a changing environment through its configuration of resources and competencies with the aim of fulfilling stakeholder expectations. The National Tourism Sector Strategy which arises from the DNTSS is thus meant to give the country's tourism sector direction and scope over the long term in order to achieve advantage in a fluid environment via the manipulation of resources and competencies with the purpose of meeting stakeholder expectations.

Destination	**2017 Annual average receipts per arrival (us$)**
Tanzania	2.020.50
Mauritius	1.243.60
South Africa	924.90
Zambia	708.30
Botswana	620.60
Zimbabwe	430.30
Namibia	272.30
Mozambique	124.20
Lesotho	107.60
Malawi	45.70

Table 1: Performance of some tourist destinations in southern Africa: Annual Average receipts per arrival

Source: WEF (2017)

Zambia was not much of a rival to Zimbabwe in terms of tourism during the past decade but it is currently ranked higher than Zimbabwe in terms of both average receipts per arrival (Table 1) and destination competitiveness index (WEF, 2017). Zambia's average spent per tourist is almost double that of Zimbabwe. Zambia is on position 108 while Zimbabwe is on 114 out of 136 country destinations. It appears Zimbabwe has drifted towards Mozambique, Lesotho and Malawi which hitherto did not quite rival Zimbabwe tourism-wise. Among other objectives, Zimbabwe's tourism strategy should therefore seek to improve her image and performance of her tourism sector. As postulated by the Tourism Business Council of Zimbabwe, TBCZ and ZTA (2018), it is imperative for Zimbabwe to regain the lost market share and grow it. The DNTSS therefore shares the same major objective with the doctoral study which sought to develop a DI recovery model for enhancing performance of the tourism sector in Zimbabwe. The development of a tourism destination is inextricably linked to the participation of stakeholder groups (Liu and Ma, 2016). Among these groups are community residents, domestic and foreign tourists and tourism practitioners. These are the core stakeholder groups of the development of a tourist destination. The government, the private sector, the host community and other stakeholders influence both image and tourism performance (Assaf and Josiassen, 2012). Given that DI recovery and performance of the tourism sector facilitate the development of tourist destinations, it goes without saying that these stakeholders play an influential role in DI recovery and the enhancement of destination performance. It also follows that, in order to enhance its performance, the Zimbabwe's tourism strategy needed to be cognisant of the needs and roles of these stakeholder groups in tourism development.

With regards to international tourists particularly, the concept of DI is very important because it influences the way consumers make travel and purchase decisions. A tourist's image of a destination could affect his or her destination choice during their pre-trip decision making, overall experience and satisfaction level with the destination after the visit (Xu *et al*., 2018). This is critical especially given that the developing world is more of a recipient rather than a provider of tourists. Ironically, in the past four decades DI studies have focused mainly on the developed Western countries which are largely source markets of the developing countries (Xu *et al.,* 2018).

Objectives

The study sought to compare and contrast an empirical study which sought to develop a DI recovery model for enhancing performance of the tourism sector in Zimbabwe with the country's National Tourism Sector Strategy (NTSS) which sought to establish a strategic direction for the recovery and overall development of a sustainable tourism economy in Zimbabwe.

Methodology

A mixed methodology was used for the doctoral study and it adopted the pragmatism research philosophy. This philosophy is a position that contends that the research question is the most important determinant of the research philosophy adopted (Saunders, Lewis and Thornhill, 2009). Thus, pragmatism is preoccupied with addressing the research question. In order to achieve this purpose, pragmatism is not committed to any one system of philosophy and reality (Creswell, 2017). Creswell (2017) asserted that pragmatism applies a practical approach, integrating different perspectives to help collect and interpret data. In view of this, Creswell, (2017) indicated that it is possible to work within both positivist and interpretivist positions if one is using pragmatism. The mixed methodology was applied together with a convergent parallel mixed methods research design. The convergent parallel mixed methods design was the most appropriate research design in that it allows for the collection and analysis of both qualitative and quantitative data separately (Creswell, 2017).The mixed methodology is quite appropriate when assessing the image of a tourist destination (Molina and Font, 2016). The convergent parallel mixed methods design helped to improve the quality of the study especially given that it is generally well suited to situations in which the researcher needs to rule out the possibility that something about the methods themselves produced the results (Bryman, Hirschsohn, Dos Santos, Du Toit and Wagner, 2014). The research methodology and research design therefore added value in terms of increased confidence in the research findings.

A combination of structured and semi-structured response formats was used to reduce interviewer bias, enhance clarity of responses and provide a broader scope for respondents (Kyalo and Katuse, 2013).Qualitative data from service providers and key informants was collected concurrently with quantitative data from international tourists. The study was conducted between May 10 and October 8, 2018. Purposive sampling, specifically judgement sampling was used to select both service providers and key informants. Tourism and hospitality service providers interact intensely with tourists and the tourism authorities and hence this sampling technique was appropriate for a research such as this one which was exploratory in nature (Blumberg, 2014). Systematic random sampling was used to select international tourists. This sampling technique selects every nth unit after a random start (Morgan, 2014). It allows for recreating the data collection environment thus it produces credible results while offering flexibility (Morgan, 2014).

There were 62 tourism and hospitality service providers, who included managers, supervisors, ordinary employees and entrepreneurs. There were 17 key informants and 237 international tourists giving a total of 316 respondents which corresponded to 90% of the targeted sample size. Data from service providers was drawn from hotel staff and management, travel agents, tour operators, transport providers, dry cleaners, event organizers, restaurant employees, helicopter and other air service providers (Victoria Falls), bankers, curio and artwork sellers, cruise and game drive firms, houseboat firms and lodges. The key informants who were interviewed were from the Civil Aviation Authority (CAAZ) (4 respondents), the Zimbabwe Tourism Authority (ZTA) (4 respondents), Ministry of Tourism and Hospitality (2 respondents), Zimbabwe Parks and Wildlife Management Authority (2 respondents), Zimbabwe Association of Airlines

(1 respondent), Association of Zimbabwe Travel Agents (1 respondent), Zimbabwe Council for Tourism (1 respondent), Air Zimbabwe (1 respondent), Hospitality Association of Zimbabwe (1 respondent).

A semi-structured questionnaire was administered to tourism and hospitality service providers and semi-structured interviews of key informants were conducted. In line with ethical considerations, interviewees were tape-recorded after they were requested and had consented to the tape-recording. All interviews were conducted in Harare because head offices of the key tourism stakeholders such as CAAZ, ZTA, Ministry of Tourism and Hospitality, Air Zimbabwe, Zimbabwe Parks and Wildlife Management Authority, TBCZ and others, are housed in Harare. Data from service providers and international tourists was obtained from Victoria Falls, Bulawayo, Kariba, Gweru, Masvingo, Chinhoyi, Zvishavane, Chegutu, Kwekwe and Harare. About half of the number of the structured questionnaires for international tourists were distributed at Robert Gabriel Mugabe International Airport in the international departure lounge while the tourists waited to fly out of the country. Potential respondents were asked if they were non-Zimbabweans to ensure that they were indeed part of the sampling frame. For the avoidance of double counting, potential respondents were also asked if they had completed the questionnaire before, for example, at a hotel or at some tourist attraction or some other place in Zimbabwe. As part of ethical considerations, all respondents were informed about the purpose of the study and that their participation was voluntary and they could withdraw from the research at any stage. Confidentiality of their identities was guaranteed and they were informed that the study was purely academic. The key informants who were keen to know the study results were told that the results would be made available to them.

Data for the DNTSS was collected during workshops which were held in Harare, Bulawayo, Victoria Falls, Masvingo, Mutare and Chinhoyi. Data was collected from the ordinary men and women who came to hotel conference rooms and other such places (TBCZ and ZTA, 2018). The crafting of the Zimbabwe DNTSS was conducted by the Ministry of Tourism and Hospitality Industry (MOTHI) in collaboration with ZTA and the TBCZ. Tourism and hospitality stakeholders then discussed with a panel of tourism experts how the future of the industry should be like. It appeared that the DNTSS adopted a mass approach in terms of its respondents and hence, other than the tourism experts, no other category was identifiable.

Data analysis

After transcribing, the interviews were sent to key informants who had provided them so they could assess and establish whether or not they had been accurately recorded. All interviewees confirmed that the interview was a true record of what they had said. NVivo version 12 was used to analyze qualitative data while SPSS version 23 (descriptive statistics and factor analysis) was used to analyze quantitative data from service providers but mainly from international tourists. In contrast, it would appear that data for the DNTSS was analyzed using the thematic approach.

Findings

Data collection period

Data for the DNTSS was collected between 8th February 2018 and 26th February 2018, a period of about two weeks. The time seems very short for an important document such as the DNTSS. On the contrary, data for the doctoral study was collected in a period of five months, from May 10 to October 8.

Tourist source markets

The doctoral study found out that Zimbabwe's prevalent tourist source markets were Europe (30.4%), Africa (28%) and the Americas (20%) while Asia (13%) showed potential. In Africa, South Africa (19%) was the leading market while UK (13%) led in Europe. These findings did not vary much with those found by ZimStat (2016) whose Visitor Exit Survey established that Africa (80.4%) was leading followed by Europe (9.8%) and the Americas (5.7%). In Africa, South Africa (38.1%) was the leading source market while in Europe, UK (38.3) was leading. There are implications for Zimbabwe's DNTSS and the NTSS.

There is need to sustain and grow these markets and to develop any other lucrative markets. Asked about new markets to be considered, a key informant remarked:

> I think Ghana is a good market, even Nigeria is a good market, Kenya is a good market, even the Emirates, that is an un-tapped market. Ohh, United Arab Emirates, Middle East are good source markets. The Chinese are not spenders… so that might work against us… but the Japanese are a good market, the Koreans, some Indians, regions of India, those are also favorable markets. (Key informant 12, 27 August, 2018).

It could be worthwhile adopting the South African approach of investing the tourism marketing budget in strategically important regions which will deliver the maximum return on investment (Tourism Department, South Africa, 2017). Unlike Zimbabwe's DNTSS which does not classify target markets, South Africa's NTSS demarcates its markets as core markets, investment markets, tactical markets and watch-list markets. This approach helps in terms of focusing resources and assessing markets because each market is evaluated according to the destination's expectations of it. South Africa's NTSS shows projections of tourism's Direct Contribution to Gross Domestic Product (GDP), Direct Employment, growth in the number of overseas tourist arrivals, increase in their direct spend, length of stay and geographic spread and growth in the number of regional (Africa land and air) tourist arrivals, increase in their direct spend and geographic spread, growth in the number of domestic tourist trips (including day trips), length of stay, direct spend and geographic spread and others from 2015 to 2026. South Africa's NTSS contains the tourism source market portfolio and the macro-economic indicators for inclusive growth of the tourism industry. This helps to evaluate the NTSS and take appropriate corrective action. While Zimbabwe's DNTSS by the TBCZ and ZTA (2018) shows projections from 2015 to 2030, in terms of tourist arrivals, contribution to GDP in dollar value, percentage contribution to employment, average length of stay, average hotel bed occupancy, among others, it however, does not show the targeted key markets.

The doctoral research found out that sound public-private sector partnerships are critical in turning around Zimbabwe's DI. The implication is that the NTSS which will arise from the DNTSS may not achieve much unless the public and private sectors have a strong partnership and are sharing one vision. The study assessed the Public-Private Sector Partnership in the tourism sector involving the Zimbabwe Tourism Authority (ZTA) and the Tourism Business Council of Zimbabwe (TBCZ). The former represents the government (public sector) while the latter represents the interests of the tourism and hospitality operators (private sector). The two sectors are pivotal in determining DI restoration and enhancing the economic performance of Zimbabwe's tourism sector. The study found out that both the TBCZ and ZTA had strengths and weaknesses which could have an impact on the performance of the DNTSS and on DI recovery in Zimbabwe. While all the 17 key informants who were interviewed during the doctoral study indicated that they were working very well with the service providers who included hotels, airline organizations, travel agents, the Zimbabwe Parks and Wildlife Management Authority, Civil Aviation Authority of Zimbabwe (CAAZ) and others, the service providers did not seem to provide a resounding positive response. Service providers were asked the following question:

Has the Zimbabwe Tourism Authority (ZTA) contributed in any way during the past three years towards enhancing the economic performance of your business?

A notable number (42%) responded in the affirmative. A fairly high figure (34%) indicated that they were unsure. This suggested that a notable percentage of service providers did not feel the ZTA's impact on the performance of their organizations during the past three years. The Zimbabwe Tourism Act, Chapter 14:20 of 1995 stipulates that the functions of the ZTA include, *inter alia*, to develop marketing skills and initiatives and to promote high standards in the tourist industry through the establishment of standards, training and human resource development. However, a key informant from ZTA was asked:

What are the major issues affecting the economic performance of your organization? Key informant 15, 18 September, 2018)

They responded: “For us, I think it’s just adequate funding.” So, a lack of resources especially financial resources, was cited as the main factor which incapacitated the ZTA. A key informant from the ZBCT also cited funding as their major limiting factor. They remarked:

Yes, the issue of funding is a major issue. We have talked about the revolving fund for many years now, we have been talking about setting up a revolving Fund since 1994” (Key informant 11, 19 September, 2018).

The Tourism Fund

Literature does not quite highlight the role played by funding in DI recovery and the enhancement of performance of the tourism sector. Karambakuwa *et al.,* (2011) noted that measures to revamp the tourism sector depended on proper planning and coordination among various stakeholders, as well as the availability of funding for tourism infrastructure and marketing efforts. The issue of funding has become almost a permanent feature on Zimbabwe’s Tourism Strategic Plans. It is indicated in the Zimbabwe DNTSS that accessing funds to invest in the tourism sector has been a perennial problem for those who have already invested in the sector and the new entrants to the sector (TBCZ and ZTA, 2018). Government has in a number of policy documents and developmental plans acknowledged the challenge (National Tourism Policy 2014 and Zimbabwe National Tourism Master Plan 2016) and proposed the establishment of a Tourism Revolving Fund. However, the tourism Fund has for long remained just an idea. The establishment and operationalization of the Fund is bound to improve the level of investment in the tourism sector and is bound to contribute meaningfully towards DI recovery and enhancing performance of the Zimbabwe’s tourism sector. The Tourism Fund is an integral part in the success of the tourism strategy which strategy is designed to provide strategic interventions in the industry.

Singapore, Mauritius, Mozambique and Kenya have Tourism Funds (Kenya Tourism Fund, 2014). Some of the Kenya Tourism Fund’s objectives include to finance tourism research, tourism intelligence and the national tourism information management system as well as to mobilize resources to support tourism-related activities (Kenya Tourism Fund, 2014). One of Fund’s core values is to promote and reward creativity and embrace best practices in service delivery. This is probably why Kenya is ahead of Zimbabwe in terms of economic performance of the tourism sector despite intermittent terrorist attacks. To illustrate this point, in 2017, together with South Africa, Morocco, Ethiopia, Tanzania, Egypt and others, Kenya was among the top ten African countries for direct employment in the tourism industry (African Development Bank, 2018). It was also among the top ten African destinations for 2016 in terms of the GDP share of tourism, tourism receipts and arrivals, together with Angola, Mauritius, South Africa, Ethiopia, Tunisia, Uganda and others (Signe, 2018). Zimbabwe did not feature in both periods.

To demonstrate her seriousness in terms of the Tourism Fund, Kenya actually has a corporate strategic plan solely for the Fund and currently she is using the 2014/15-2018/19 corporate strategic plan. A key informant remarked:

> Yes, the issue of funding is a major issue… We expect that Fund to be established with funds coming from various quarters including government. Government should be a shareholder in that funding facility that we want to set up. We wanted a revolving fund that should be managed by ehh, what do you call them? Trustees, yah, a board of trustees and with interest rates that are conducive to business operators so that we give them the opportunity to keep on upgrading their facilities… We have talked about the revolving fund for many years now. We have been talking about the revolving Fund since 1994. It’s one thing that is certainly required by the operators

> so that they can be able to do their business well. (Key informant 11, 27 September, 2018).

Inclusivity and diversity

One of the guiding principles and core values of the DNTSS is inclusive development. Inclusivity and diversity "will enable us to involve the participation of all in tourism without limitations that may be paused by poverty, gender, religion, age, economic status and disability" (TBCZ and ZTA, 2018). As such the TBCZ and ZTA (2018) commit that products and services and entrepreneurship should benefit all within the value chain. However, it appears that the DNTSS marginalized the voice of the tourist especially the international tourist as well as the service provider. It appears therefore that the DNTSS received more of executive influence than market influence. It appears that it is more of product driven rather than consumer driven. This was significant in that it was a negation of the principle of inclusivity. The international tourist is a key stakeholder not only in strategy formulation for tourism, but in the DI recovery process too. The same applies with the service provider. The Department of Tourism, South Africa (2015/2016) noted that an increase in tourism's economic contribution is propelled by an increase in domestic and international tourist arrivals as well as an increase in tourist spend. The views of the international market were critical especially given that the NTSS, among other objectives, sought to "… regain the lost market share in the international markets and penetrate new markets…" TBCZ and ZTA, 2018, p22). It seeks to "increase the share of overseas tourist arrivals from 14% to 30% by 2030" (TBCZ and ZTA, 2018, p51). These strategic objectives may remain a pipe dream unless inclusivity and diversity is seriously factored in the NTSS.

Like the doctoral study, the DNTSS acknowledges the need for a stakeholder approach in order for it to achieve its strategic objectives which include increasing "tourist arrivals from 2.4 million in 2017 to 9 million by 2030" (TBCZ and ZTA, 2018, p.51). According to the TBCZ and ZTA, 2018, women and youth capacity building, entrepreneurship, leadership and empowerment will be important drivers of the NTSS. However, as cited by TBCZ and ZTA, (2018), Zimbabwe's regulatory environment is still toxic for those working in the tourism sector as well as potential investors to the sector. For, example tour operators have to adhere to some ten Acts and statutory regulations in their operations. These regulations constitute an entry barrier to the sector for budding small and medium sized entrepreneurs including women and the youths. The doctoral study also revealed that 'ease of doing business' was still problematic in Zimbabwe.

Village tourism

It appears that DNTSS is not quite alive to village or rural tourism. Village tourism refers to complex touristic activities carried out in a rural environment in close connection with nature and people, based upon the personal experience of the rural lifestyle, culture and agriculture (Kanokanga, Mamimine, Mapingure, Mwando and Chidyafodya (2015). For example, there are a number of villages falling under the Greater Chinhoyi area. These include Runene, Hombwe, Madzorera, Godzi, Kaondera, Zumbara, Musariri, and others. The daily activities of people in these villages provide a great opportunity for international tourists to experience the cultural heritage of the Other (Kanokanga *et al.,* 2015). Depending on season, in the fields, visitors would experience traditional or put succinctly, the use of traditional or primitive farming methods which include manuring, planting, weeding, harvesting and others. The study by Kanokanga *et al.,* (2015) revealed that cultural heritage and cultural memory are the 'shining stars' in the growing field of cultural tourism. These facets of tourism, although they are important draw cards for Zimbabwe's tourism and hence can be instrumental in turning around the fortunes of the country's tourism, nevertheless were not highlighted in the DNTSS. The rich and diversified indigenous cultural products remain unexplored for tourism purposes; the opportunities for business and conferencing products, sports products, among a plethora of others that are spread across the country (Government of the Republic of Kenya, 2013). An oversight was made when villagers and international tourists were excluded from the research sample. An international tourist cited 'cultural diversity' (International tourist 91, 22 October, 2018). While the doctoral study did not collect data from villagers *per se*, it gathered the views of 240 international tourists.

The DNTSS is silent on the stakeholders' views on issues which relate to universal access of tourist attractions especially heritage sites such as Great Zimbabwe and amenities such as hotels, lodges, restaurants and retail shops. Unlike the DNTSS, the doctoral research, through international tourists, found out that the quality of facilities for people with disabilities was poor (a Mean value of 2.89). This was despite that these facilities were very important (Mean value of 3.79) to the international respondents (Table 2). Li, Ali and Kim, (2015) asserted that both general and tourist infrastructure were important determinants of DI and tourism performance. Kanokanga *et al.,* (2018) went on to contend that these same dimensions of DI were important for DI recovery.

	N	Mean	Std. Deviation	Skewness		Kurtosis	
	Statistic	Statistic	Statistic	Statistic	Std. Error	Statistic	Std. Error
Zimbabwe's Accessibility as a Destination	236	4.05	.907	-.998	.158	.741	.316
Infrastructure at the Country's Immigration (entry point used)	238	3.94	1.017	-.828	.158	-.075	.314
Service at Immigration (entry point used)	237	4.03	.954	-.975	.158	.284	.315
Accessibility of Tourist Destinations within Zimbabwe	234	4.22	.754	-1.059	.159	1.778	.317
Road Condition	236	4.06	.927	-1.031	.158	.828	.316
Inland Transportation/Taxi/Bus	232	4.00	.958	-1.013	.160	.864	.318
Natural Landscape	234	4.47	.663	-1.154	.159	1.258	.317
Climate	235	4.32	.771	-1.409	.159	2.657	.316
Tourist Attractions	234	4.40	.712	-1.110	.159	1.152	.317
Cleanliness	238	4.38	.785	-1.370	.158	1.991	.314
Tourist Information	234	4.23	.853	-1.006	.159	.623	.317
Quietness (Noise Pollution)	234	4.02	.929	-.886	.159	.364	.317
Friendliness of Local People	232	4.46	.695	-1.615	.160	3.982	.318
Opportunities for Learning Ethnic Customs	233	3.86	.961	-.741	.159	.067	.318
Local Cuisine	231	3.91	.877	-.718	.160	.197	.319
Nightlife/Entertainment	233	3.34	1.222	-.430	.159	-.792	.318
Attitude of Service Personnel	237	4.33	.777	-1.414	.158	2.850	.315
Safety and Security	236	4.61	.659	-1.716	.158	2.618	.316
ICT Readiness	231	4.06	.910	-.776	.160	.178	.319
Conference Facilities	229	3.34	1.169	-.401	.161	-.551	.320
Facilities for Young Children	228	3.56	1.127	-.590	.161	-.258	.321
Facilities for People living with Disabilities	228	3.79	1.045	-.784	.161	.321	.321

Table 2: Importance of destination attributes by international tourists
Source: Primary data (2018)

Pricing

The DNTSS acknowledges that Zimbabwe is an expensive destination. However, this is not cited as a destination weakness in SWOT Analysis. Pricing was cited by international tourists, service providers and key informants as a huge weakness of the destination (Figure 1). When asked about their perception of pricing in Zimbabwe, a key informant remarked that:

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> …our prices yes, one can say are high... There is a tendency for people to come to us very often and say, 'your tourism product is very expensive'. But it's not expensive in isolation. It is expensive because of the value chain. We have a value chain which is impacting on us (Key informant 11).

Figure 1: Pricing and DI recovery **Source:** Primary data (2018)

This view was echoed by another key informant who noted that we: we need to be price competitive (Key informant 12).The view that Zimbabwe was an expensive destination was also highlighted by the service providers who responded to the allegation: 'Prices of goods and services are generally high in Zimbabwe,' with a Mean of 4.23. This suggested that they agreed with the allegation to a large extent. They also responded in the affirmative (Mean 3.98) to the claim that: 'Fuel price levels negatively affect the performance of my organization.' Thus they felt that fuel prices were very high (Table 3). This view was corroborated by international tourists who rated the quality (goodness) of different destination attributes on a five-point Likert Scale. The Mean values for goodness of pricing for restaurant food, restaurant beverages and goods and services were high suggesting high (uncompetitive) pricing (Table 4) According to Field (2016), a Mean value above 3 means 'high'or a positive response while the opposite is true.

	N	Mean	Std. Deviation	Skewness	Kurtosiss
	Statistic	Statistic	Statistic	Statistic	Statistic
Government tourism policies are favourable to my organization	62	3.08	.893	-.305	.701
Time required to start a business in Zimbabwe is too long	62	3.32	1.170	-.348	-.187
The number of international airlines flying into Zimbabwe is satisfactory	61	2.21	1.035	.488	.294
Quality of the country's roads has negatively affected my organisation's performance	62	3.90	.936	-1.167	1.780
The perception of corruption in the country has negatively affected my business's performance	62	3.73	1.104	-.788	.068
The current level of safety and security in the country instils business confidence	62	3.48	.936	-.137	-.274

The country's unemployment rate poses a huge risk to performance of my organisation	61	3.46	.886	-.020	.042
HIV/AIDS among employees has negatively impacted the performance of my organization	62	2.39	1.014	.026	.540
It is quite easy for my firm to find the right skilled employees in Zimbabwe	62	3.18	1.222	-.184	-.573
Zimbabwe's tourist attractions are largely tired	61	3.05	1.087	-.422	-.565
There is transparency in the way in which the tourism levy is used	62	2.81	1.069	.151	-.426
Fuel price levels negatively affect the performance of my organization	62	3.98	.878	-.419	-.658
Prices of goods and services are generally high in Zimbabwe	62	4.23	.913	-.872	-.298
Valid N (listwise)	60				

Table 3: Determinants of DI Recovery and Tourism Performance (Tourism service providers' views)

Source: Primary data (2018)

	N	Mean	Std Dev	Skewness		Kurtosis	
Lodging Prices	235	3.43	.928	-.310	.159	-.247	.316
Restaurants	236	3.60	.862	-.620	.158	.383	.316
Overall Prices of Restaurant Food	238	3.37	.954	-.399	.158	-.441	.314
Overall Prices of Restaurant Beverages	237	3.41	.910	-.506	.158	-.250	.315
Overall Prices of Goods and Services	237	3.34	1.003	-.626	.158	-.109	.315

Table 4: Uncompetitive pricing
Source: Primary data

Ironically, pricing was deemed a very important attribute by international tourists (Table 5).

	N	Mean	Std Dev	Skewness		Kurtosis	
Lodging Prices	237	4.19	.889	-1.186	.158	1.406	.315
Restaurants	236	4.17	.855	-1.330	.158	2.399	.316
Prices of Restaurant Food	238	4.09	.879	-1.188	.158	1.769	.314
Prices of Restaurant Beverages	236	4.11	.878	-1.244	.158	1.937	.316
Prices of Goods and Services	235	4.22	.832	-1.369	.159	2.541	.316

Table 5: Rating the importance of pricing

Source: Primary data (2018)

High prices can cause the NTSS to under achieve its purpose of turning around DI image and tourism performance and growing tourist arrivals and receipts as well as the tourism economy in general. A ranking of the determinants of tourism performance by Assaf and Josiassen (2015) found out that tourism price levels were the fourth out of eight key drivers of destination performance. They specifically cited ticket prices, fuel price levels and the hotel price index as critical factors. The DNTSS does not give due regard to pricing as a factor that can undermine the tourism strategy and consequently DI recovery.

The word 'prices' was one of the most popular fifteen words which was used by the key tourism stakeholders (Figure 2). This suggested that the word was very relevant to the study and hence due attention had to be put on pricing. The other very prominent words included economic, performance, tourist, image and others**.**

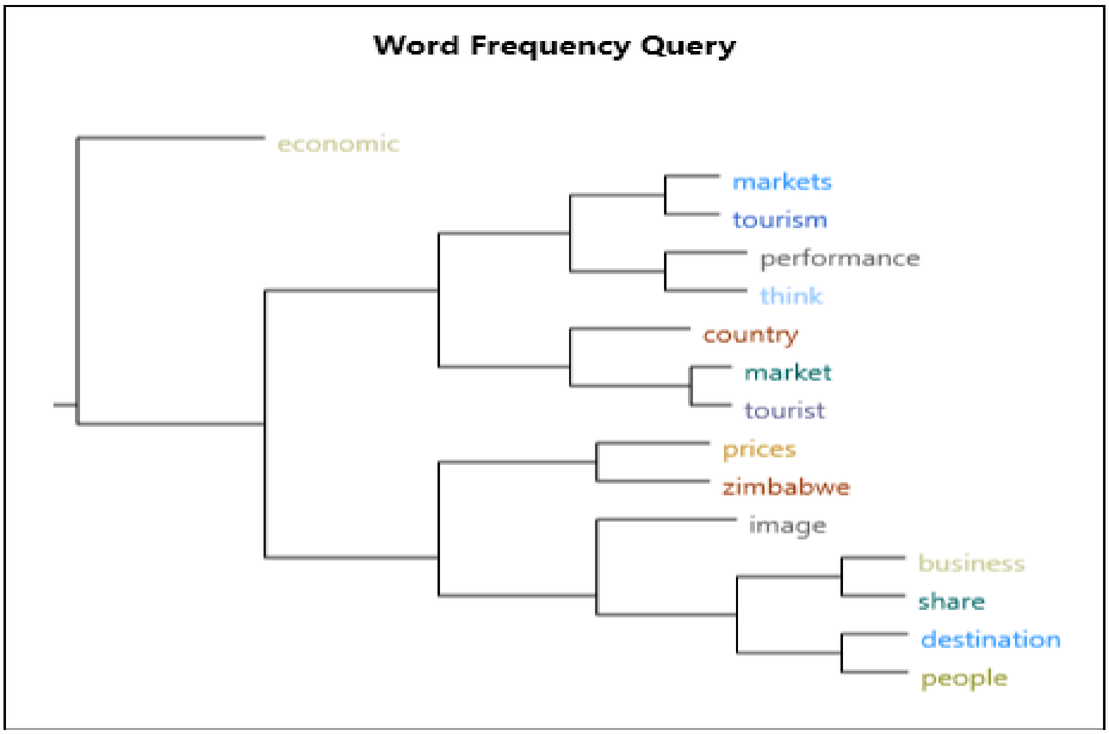

Figure 2: Word popularity
Source: Primary data (2018)

The political and economic environment

Zimbabwe's DNTSS was largely crafted on the basis of eight pillars, namely environmental sustainability, destination management, product development, effective marketing, facilitation and access, information communication technology, human capital development, and policy and governance. It does not quite cover political and economic challenges which were found by the doctoral study to be negatively affecting DI recovery and performance of Zimbabwe's tourism sector. Remarks below from international tourists lend credence to this. When asked about recommendations which Zimbabwe could adopt for regaining market share, political and currency stability featured prominently:

> …political stability, stability of currency" (International tourist 176, September 28, 2019), "promote friendliness and solve political issues" (International tourist 122, 15 September, 2018), "political stability" (International tourist 122, 28 September,

> 2018), and "better infrastructure and fair politics (International tourist 141, 18 September, 2018).

When the international tourists were asked about suggestions Zimbabwe could adopt to enhance its attractiveness as a tourist destination, some of the responses were:

> …improve security and the economy (International tourist 123, 25 September, 2018), "promote friendliness and solve political issues" (International tourist 122, 20 September, 2018), "Make the currency system easier to handle and understand. Make police road blocks hassle-free and avoid a return to the era of bribery as police demanded money for no reason (International tourist 231, 4 October, 2018)

This position was shared by service providers whose responses were:

> fuel too expensive" (Service provider 55, 8 September, 2018), "The economic challenges facing the country" (Service provider 62, 13 September, 2018), "lack of foreign currency"(Service provider 50, 9 September, 2018), "economic and political issues"(Service provider 49, 9 September, 2018), "speculation, political instability, economic meltdown" (Service provider 47, 6 September, 2018), "shortages of raw materials and foreign currency" (Service provider 45, 30 August, 2018), "fuel prices, corruption, load shedding, high cost of living-prices are too high" (Service provider 36, 28 August, 2018), "Shortage of foreign currency-American dollars to pay airline bills" (Service provider 19, 25 August, 2018), and "political instability and poor economic performance" (Service provider 6, 18 August, 2018), and load shedding, fuel shortage and cash crisis (Service provider 1, 4 August, 2018).

Key informants were asked for suggestions on regaining lost market share some of the responses were:

> …once we lost that market, we shouldn't be going on a drive to regain. We should go on a drive to gain not to regain. So, we should constantly be gaining not to regain because when you are going to berg again, you don't have guarantee that traffic will come again. By the time you want to regain, they are now used to going to Botswana and elsewhere… if we can sustain new markets, then we don't have to get to a place where we need to regain.
>
> My emphasis on new markets was around Africa because I think this is a missed opportunity. I think that's a greatly missed opportunity… I think Ghana is a good market, even Nigeria is a good market, Kenya is a good market, even the Emirates, that is an un-tapped market. (Key informant 10, August, 2018).

While key informant 10 did not directly cite the political dimension, the idea of attracting largely African markets has political implications. As noted by Kastenholz (2010), markets which are racially close to the destination tend to understand the destination, including its national politics and tend to have a better image than do far away markets and this could be due to cultural proximity. Kastenholz (2010) conducted a study on cultural proximity as a determinant of DI and the results confirmed an impact of 'cultural proximity' on DI. According to Palani and Sohrabi (2013) some of the deepest and most widespread influences on consumer behaviour are cultural factors. There are several ways in which culture can be expressed; the most obvious would be through tangible objects like food and clothing. It is a very integral part of the hospitality and travel industry; determining what we eat, how we travel, where we travel, and where we stay (Palani and Sohrabi, 2010). However, Palani and Sohrabi (2013), posit that culture is dynamic and adapts to its environment.

Another key informant emphasized the political dimension: "If our politics is right, we do what is acceptable by the external world, then everything else am sure, will follow through." (Key informant 1, 19 September, 2018).

It is interesting that the DNTSS did not highlight the role politics plays with regards to the observance of human rights including the observance of the various forms of freedom, in DI recovery. The doctoral study however, covered this aspect.

In contrast to Zimbabwe DNTSS, Kenya's Eco-tourism Strategic Plan (2016-2020) includes political risk, factors such as changes in government and commitment, corruption and political instability and security. The major economic risk factors include interest rates, exchange rate fluctuations and funding difficulties (Government of Kenya, nid).In Zimbabwe, 'changes in government' is generally excluded from tourism strategic plans. Also, the government commitment to tourism (prioritization of travel and tourism) is not interrogated although according to WEF, (2015), it is a low 112 out of 141, South Africa 46 out of 141 and Kenya 23 out of 141.

Accessibility

The doctoral study found out that it was cumbersome for international tourists to access Zimbabwe and to access destinations within it such as Hwange, Nyanga and others, by air. A key informant noted:

> As I speak now, Air Zimbabwe is limited to Bulawayo and Vic Falls, domestically. You cannot go to Hwange if you want because that airport is dilapidated as we speak. I know there is a new baby on the tourism market which is Nyanga, Mutarazi and stuff like that. But we cannot fly people there not because we don't want and not because there are no people who want to go there, but because it's not possible. So I think there is a lot to be done as far as infrastructure development is concerned.

The national carrier (Air Zimbabwe) is struggling. This has implications for DI recovery arising from flying time to the destination. Distance or flying (reaching) time to the destination and local transportation are critical accessibility components (Heenah, 2017).

Suggest strategies for improving DI and performance of the tourism sector in Zimbabwe

Figure 3: The need for aggressive marketing **Source:** Primary data

The study found out that aggressive marketing was needed in order to achieve sustainable DI recovery (Figure 3). When asked about how Zimbabwe could regain market share, a key informant responded:

> We can reengage, we can extend our market share. We can also engage consultants so that we reconnect and attract markets that we think are key to tourism development in this country. (Key informant 4, 17 September, 2018).

This view was echoed by a service provider who felt that in order to regain market share, there was need for Zimbabwe to "reengage the old markets and use specialist public relations persons to promote Zimbabwe" (Service provider 58, 15 October, 2019).

Hypotheses

The study sought to test three hypotheses:

H1. There is a significant positive relationship between DI and the performance of the tourism sector.

H2. The affective dimension of DI mediates the relationship between the cognitive dimension and the performance of the tourism sector.

H3. Determinants of DI have a positive relationship with the performance of the tourism sector.

All three hypotheses of the doctoral study were supported. All components of the cognitive image, namely accessibility, attractions, ancillary services, amenities and price were very strong (**Figure 4**). These were critical to cognitive image and DI recovery in the Zimbabwean context.

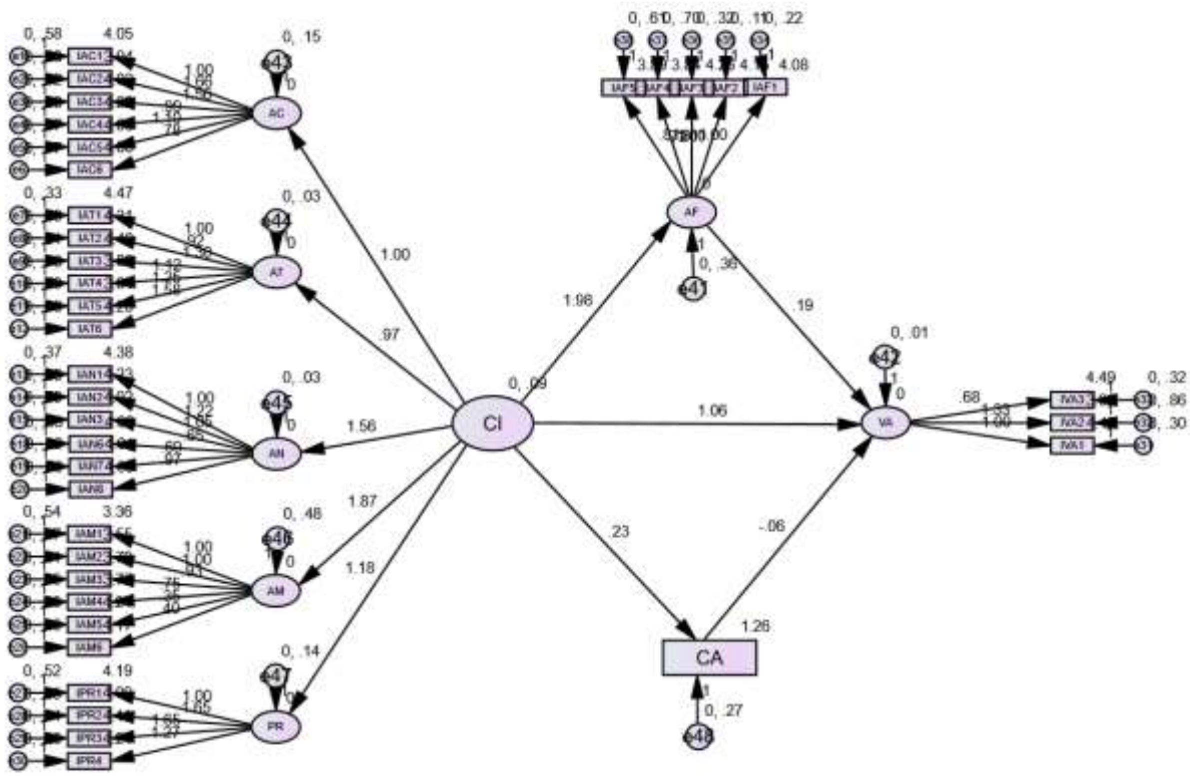

Figure 4: Hypotheses testing results

Source: Primary data (2018)

The Cronbach's Alpha reliability tests supported the study's results with regards to hypotheses tests- affective image 0.863, overall destination value (performance) (VA) 0.748, accessibility (AC) 0.720, attractions (AT) 0.676, ancillary services (AN) 0.756, amenities (AM) 0.730 and price (PR) 0.879. Cronbach's Alpha measures the reliability of the constructs and a result of at least 0.7 suggests a high reliability (Field, 2016). The claim in the Zimbabwe DNTSS (2018) that the country's tourist product is tired does not appear to be wholly true given a fairly high Cronbach's Alpha reliability of 0.676. However, there seems to be truth in the claim in light of the fact that the reliability test was below 0.7 and is the lowest among all the reliability tests. The fact that Zimbabwe's natural dimensions of DI recovery such as landscape, weather and the friendliness of local people were rated much higher than man-made ones by international tourists suggests that more attention needs to be put on developing man-made attractions.

The possible reason why natural dimensions of DI were rated higher than the man-made could be historical. Zimbabwe is more renowned for its wildlife, Victoria Falls, and weather (Abel, Nyamadzawao, Nyaruwata and Moyo, 2013; ZTA, 2017) than it is for culture and other man-made attractions. This implies that culture is yet to be properly packaged and offered to the market as a tourist product. Cognitive image includes the natural environment and the developed environment including tourist amenities and personal safety and convenience (Slabbert and Martin, 2017). These attributes of DI recovery needed to be given serious attention in the DNTSS especially given that cognitive image is an antecedent of the affective image (Slabbert and Martin, 2017). The affective dimension of image denotes a person's feelings towards and emotional responses to a destination (Stylidis, Shani and Belhassen, 2017). According to Gartner (1993), the affective component becomes operational during the evaluation stage of destination selection. It is therefore crucial for the DNTSS to be cognisant of this characteristic of affective image in order for DI recovery to be fully realized in Zimbabwe. The positive relationship between determinants of DI and tourism performance was significant for the DNTSS to the extent that committees of stakeholders could be established to manage categories of DI determinants such as cognitive image and affective image.

Conclusions

The study sought to compare and contrast an empirical study which sought to develop a DI recovery model for enhancing performance of the tourism sector in Zimbabwe with the country's DNTSS which sought to establish a strategic direction for the recovery and overall development of a sustainable tourism economy in Zimbabwe. The findings of this study provide some managerial insights to developers of national tourism sector strategies and destination marketers especially where DI recovery is involved. The study found that the data collection period for Zimbabwe's DNTSS was too short (18-26 February, 2018). This had the potential effect of compromising the quality of the tourism sector strategy. Also, the DNTSS research respondents were drawn from six towns and cities. Views of the villagers were therefore not considered in the DI recovery process and yet these people form the bedrock of the much needed cultural and rural tourism. This had the potential of compromising the sustainability of rural tourism. It also omitted the views of international tourists who are critical stakeholders in DI recovery research. On the contrary, data collection for the doctoral research was done over a fairly long period (May 10 to October 10, 2018). Respondents were drawn from international tourists, tourism service providers and key informants although villagers were also not specifically targeted. However, the triangulation used in the doctoral research which entailed key stakeholders in-depth interviews, tended to add rigor and hence enrich the study results.

The Zimbabwe DNTSS was silent on the key markets to be targeted with the possible result that destination marketers could misdirect resources such as manpower, funds and time required for DI recovery. South Africa's NTSS divides up markets into core markets, investment markets, tactical markets and watch-list markets. This was important in that the resource allocation and evaluation of the markets became easier. The composition of international tourists who took part in the doctoral study was seen to be supported by literature: Africans, Americans and the British topped the list. The implication was that more resources should be directed to these source markets while growing other markets such as Asia which showed potential.

The high prices were highlighted by both the Zimbabwe's DNTSS and the doctoral research. While the doctoral study suggested a review of the tourism value chain, the Zimbabwe DNTSS did not seem to provide a clear solution on pricing. The NTSSs of South Africa, Kenya and Mozambique were not experiencing the price challenge.

While the political and economic environments were cited in the doctoral study as issues with the potential to negatively influence DI recovery, Zimbabwe's DNTSS tended to emphasize the economic environment.

Zimbabwe's accessibility as a destination was found to be a critical factor in both Zimbabwe's DNTSS and the doctoral research. Zambia was perceived to be more accessible and seemingly enjoying a more positive DI than Zimbabwe.

All three hypotheses of the doctoral study were supported suggesting that there was need to continue to manage properly the cognitive dimensions of DI but accessibility and attractions needed improvement. International tourists felt that natural components of cognitive image and DI recovery were more appealing than the man-made dimensions. This could have been mainly due to a historical view of Zimbabwe as a destination which is driven more by wildlife, Victoria Falls, hospitable people and other natural attributes than by man-made dimensions such as the tired Kariba resort.

Recommendations

Future research on the development of the DNTSS should allocate more time to the exercise especially to data collection. It was necessary to also include villagers and international tourists. Interviews would have the advantage of neutralizing the liabilities of the different data collection method such as the consultative stakeholder workshops which were largely the sole approach used by the DNTSS. This helps to enhance the credibility of the research findings (Creswell, 2014).

The study recommends that in the DNTSS, the market could be divided up into distinct components such as core markets, investment markets, tactical markets and watch-list markets. The Tourism Department, South Africa (2017) uses it and South Africa is one of Africa's top tourist destinations. There was need for the ZTA and TBCZ to set up a price review committee which would assess the tourism value chain with a view to coming up with competitive prices especially for tourism and hospitality products. However, there was need for a sound public-private sector partnership in the country generally in order to have a favourable business environment which attracts investors into the various sectors of the economy. This was bound to lead to reduced production costs and reduced prices to the customer. ZimStat (2016) also noted the need to have competitive prices. While economic strategies were required in order to improve the business environment especially with regards to monetary policy, there was also need to adopt political strategies. This would increase the chances of success of the NTSS. Political stability and personal safety are part of the cognitive image (Slabbert and Martin, 2017) which cognitive image influences the affective image.

The study recommended that the economic space be further opened up to prevent local firms from shutting down or relocating to neighbouring countries. The natural components of cognitive DI should remain impressive to international tourists but more high quality man-made attractions were needed. This often calls for community engagement in order for the sustainability of the product development and the NTSS. Also, community engagement was important to the success of a tourism destination (Department of Tourism, South Africa, 2017). More innovation was required on the part of tourism product developers and destination planners in order to have more appealing man-made tourist attractions. This would reduce the over-dependence on natural attractions. This was bound to positively impact DI recovery in Zimbabwe. Future research could consider assessing the implementation of the NTSS with a view to enhance the effectiveness of the national tourism strategy.

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