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Re-tooling challenges for Zimbabwean tourism operators in a multi-currency trading environment

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Abstract

Over the past decade the Government of Zimbabwe (GOZ) initiated ease of doing business reforms aimed at repositioning the country`s tourism industry. This study reviews tourism operators` re-tooling challenges in Zimbabwe`s current economic landscape. A questionnaire survey was administered on sixty tourism sub-sector`s representatives. Findings highlight that local tourism operators are experiencing sub-optimal capacity utilisation, and a dire liquidity crunch. Results further showed that local operators` re-tooling efforts have been harm-strung by policy inconsistency, antique production equipment, debt legacy issues, devastating effects of sanctions or restrictive measures, lack of skilled personnel and brain drain, and a very high cost of doing business. The study conceived that Zimbabwe currently does not tick all the boxes of being a first choice tourist destination given the international tourism market`s low opinion on its very expensive destination tag, and its intoxicated political and economic environment. However, there was general consensus among stakeholders that the gamut of challenges was not insurmountable with the necessary political will. Recommendations were the need for the speedy rehabilitation of destination Zimbabwe`s relations with international financial institutions and de-construction of the high risk country profile index in order to firmly put the tourism sector on a solid path again.

Keywords: Re-tooling, operators, Zimbabwe tourism industry, challenges, dollarization, multi-currency trading environment**.**

Introduction

Zimbabwe`s tourism sector grew steadily since 1980 until the late 1990s when it was interrupted by negative developments on the economic and political front (Mkono, 2010). This triggered a chain of challenges which have become a stumbling block for tourism entrepreneurs in Zimbabwe. It is against this backdrop that a lasting solution is being sought by the GOZ, tourism operators, and policy makers to resuscitate the tourism sector to pre-1990 performance, where it used to contribute 12 per cent of the country`s gross domestic product (GDP), as well as providing job opportunities in excess of 200000 people. This study seeks to unpack these challenges and proffer possible solutions. It is the writer`s qualified view that the study may be of significant importance at policy making level particularly the GOZ, Ministry of Environment, Tourism and Hospitality Industry (MOTHI), and regulatory authority as it would highlight the various challenges currently stifling tourism development and holding back the sector from contributing more to Zimbabwe`s economic development agenda. Additionally, other quasi government institutions like the apex bank (RBZ), Ministry of Finance and Economic Development, Zimbabwe Revenue Authority (ZIMRA), and local authorities whose activities directly or indirectly impact on the operations of the tourism sector would get more insight into the tourism`s micro operating environment. GOZ, MOTHI, and ZTA are critical policy and decision makers which would be informed by what is obtaining on the ground and take remedial action. If these institutions elect to maintain the status quo it implies that they should as well not expect to see any tangible results on the economic development agenda and if they implement drastic changes to policies then they should expect an uptick of dividends from the tourism sector.

Study rationale

While the benefit of tourism at the macro level appear enormous and promising, it is important to understand the micro economic aspects of the sector as well as the challenges that the sector is facing. No documentation of these challenges has yet been done in the Zimbabwean context. There is a universal cry from tourism operators in Zimbabwe bemoaning a toxic operating environment in the mould of the multi-currency trading regime, however, the challenges have not been officially documented. The cry is increasingly getting louder, which may imply that either there is no solution in sight for the challenges or the operating environment is deteriorating, and this study is set to unravel this. Given the fact that the tourism industry is very sensitive to market dynamics, this study seeks to review and assess the peculiar challenges that are confronting the tourism business community in Zimbabwe in the context of the current multi-currency trading environment.

The study envisages to suggest policy recommendations which may give the tourism sector a new lease of life. The recommendations may inspire tourism operators in Zimbabwe to reconfigure their business models to confront head on the new realities in the market place. While it can be noticed that very little information is available on the challenges confronting Zimbabwe tourism operators and how they are navigating the unfavourable environment, it is equally important to observe that such information is outside the prisms of empirical research. Very little empirical researches have been done in the tourism value chain to establish the challenges tourism operators are facing, and determine policy intervention measures that can be implemented to salvage the situation. This study seeks to address this.

This study will also hopefully contribute and expand on the on-going debate around Zimbabwe`s economic recovery, re-engagement with international community, political transition and the vision to have a middle income country status by the year 2030. The study will argue that dollarisation that was widely celebrated for being a master stroke in taming hyperinflation in 2008 seem to be increasingly turning out to be a double-edged sword for the tourism business community in Zimbabwe, the flipside side that escaped the attention of policy makers back then in 2009. The study would rebuff Makochekanwa and Kambarami (2011)`s assertion that dollarization brought discipline and credibility to the Zimbabwe financial sector, and also attracted investors, and aver that dollarization brought more harm than good to the tourism business community.

Literature Review

Tourism and the global external environment

World- wide tourism has evolved as one of the fastest growing sectors largely on account of its importance on multiple levels. Mishra (2008:29) intimated that travel and tourism captured the global market carrying 70 million international arrivals in 1960 to 700 million in the year 2000 and that according to UNWTO, international tourist arrivals could exceed 1.5 billion by the year 2020. Globally, the tourism sector is turbulent, punctuated by a myriad of challenges, and episodic events making it imperative for tourism operators to continuously revisit their offerings, making necessary re-alignments in response to the dynamics in the macro operating environment (Carlsen, 2006; Faulkner, 2001). In order to maintain a competitive position in the market place tourism operators must periodically retool and re-engineer their product offerings. On a global scale, tourist destinations have experienced a number of setbacks like the documented September 11, 2001 terrorist attacks on the Pentagon, the 1997-98 Asian financial crisis, global recession, great depression of the 1930s, world war one (WW1) and world war two (WWII), severe acute respiratory syndrome (SARs) outbreak, Avian flu, HN1, tsunami, Ebola outbreak in West Africa, political and economic turmoil, Mumbai and Bali bombings, as well as Icelandic ashes, phenomena which in their aftermath made tourism operators re-set their factory settings in order to remain competitive (Silver and Fischoff, 2011; Silver and Matthew, 2008). To further cement the above, the United Nations World Tourism Organisation (UNWTO) (2015) posits that global recessions, natural disasters, acts of terrorism, health pandemics, effects of climate change, currency fluctuations and rising oil and food prices, collectively pose various threats to the stability of the tourism industry at global, regional and national level. History is pregnant with cases of tourist destinations which in their evolution process have at one time experienced disasters especially weather related events such as floods and hurricanes, natural disasters, earthquakes and tsunami, and other events like pandemics and terrorist attacks (Mair *et al.,* 2014). Past studies have consistently shown that tourists tend to substitute 'risky destinations with safer choices.

Literature documented that after the September 11, 2001, tragedy, it took more than three years for the tourism sector to recover. It is instructive that countries which depend on tourism as one of their backbones economically, could face economic and infrastructural difficulties as a result of sustained challenges crippling the operations of local tourism players. Arana and Leon (2008) noted that since tourism is quite a sensitive industry, terrorism, natural disasters, and political instability among others could prevent tourism inflow to destinations. In addition, Faulkner (2001, p. 136) states that " relatively little systematic research has been carried out on disaster phenomena in tourism, the impacts of such events on the tourism industry and the responses of industry and relevant government agencies to cope with these impacts" have been conspicuously absent in current tourism discourse. In view of the foregoing Gitu (2003) and Essner (2003) opined that an enabling environment for the tourism sector is paramount, chronic challenges stifling the development of the sector are worrisome as they are bound to stagnate the overall development process.

Baker and Coulter (2007) argued that an unfavourable operating environment cause negative effects on tourism because vacation and tourism remain perishable goods that cannot be stored for late use. Tourism per se seem to be prone to many disasters ranging from wars, conflict, civil wars, economic melt- down, climate and international isolation. It is important to note that despite the promising development dynamics in the tourism industry through statistical figures proffered by the UNWTO, tourism business remains fragile and is exposed to risk factors such as political instability and conflicts, natural disasters, wars, and acts of terrorism. Evidence abound where the tourism industry witnessed a series of tourist attacks in the last decade, and the literature is replete with such episodic events (FoxNews, 2013; Faulkner, 2001; Giulianotti and Klauser, 2012; Grady and Blakley, 2010; Paraskevas, 2013; Pizam, 1999; Ritchie, 2003; Sautma, 2004). However, despite the high number of attacks and the attendant dire consequences, the global tourism industry has proven to be resilient and has adopted various strategies to adapt to such turbulent times. After such episodic events or disasters, the tourism business community suffered varying setbacks like a decline in the tourism arrivals, revenue and job losses.

The recent frequency and intensity of crises and disasters affecting the tourism industry has resulted in a growing body of research into the causes, effects and management of the same. The tourism industry is greatly reliant upon and is impacted by many external factors, ranging from currency exchange rate, political situations, discretionary income, the environment and weather (Cassedy, 1992; Okumus, Altinay and Arasli, 2015; Pforr, 2009). When crises and disasters take place, the tourism industry, the tourists they serve, and the local communities are equally affected (Mansfeld and Pizam, 2006). Such events inevitably divert tourism flows away from a particular destination or region (Cavlek, 2002). The increase on the impact of crisis and disasters has led to more recent tourism related research as contended by Evans and Elphick, (2005); Fall and Massey, (2005); Frisby, (2002); Hooper, (2002); Pine and Mckercher, (2004); Stafford and Armoo, (2002); Chandler, (2004); Higgins, (2005); Carlsen, (2006); Garcia *et al.*, (2006); Hendersen, (2005, 2007); and Armstrong and Ritchie (2007). Most well-documented crisis situations for tourism have revolved around health and security (Faulkner, 2001; Mansfield, 1999; Sonmez, 1998; Sonmez *et al.*, 1999). Ritchie (2004) did a study on strategic approaches to crisis management in the tourism industry, and noted that whilst crises and disasters in the tourism sector cannot be completely stopped their impacts can be limited by both public and private sector managers working together exchanging information and comparing notes. It is therefore instructive that world over in the aftermath of a crisis tourism operators have to re-strategise or retool in order to regain market confidence.

Adverse phenomena and their impact on tourism

Rithie (2003), Sautma (2004) and Paraskevas (2013) opined that tourism operators should adapt to market dynamics through implementing strategies that ensure survival and viability in an adverse micro environment. During times of adversity tourism business community is challenged to be innovative and reinvent by converting obstacles into opportunities that can be leveraged upon. Historically, it usually takes a major crisis to usher in an era of creativity, efficiency and innovation in any economic sector.

Events that have taken place in the sphere of tourism since the infamous September 11, 2001, terror attacks have shown that the global tourism industry is changing at a more rapid pace than at any other time in history warranting the sector to reinvent (World Bank, 2010). The changes in the broader global environment surely challenge the way policy makers, tourism business leaders and tourist facility managers, and destination authorities plan for the future tourism development irrespective of their geo-political space or location. Mansfeld and Pizam (2006) argued that tourism stakeholders must be proactive, and quickly respond to dynamics in the political, economic, social, technological, environmental and legal spheres (PESTEL) if their enterprises are to remain afloat.

According to the United Nations World Tourism Organisation, (2002), (2004); and Richardson, (2010) governments across the globe have made the development of the tourism industry a priority in national policy decisions. To date, the tourism industry has evolved into a global phenomenon getting the attention of multi-national institutions like the World Bank (WB), International Monetary Fund (IMF), and United Nations Educational, Scientific and Cultural Organisation (UNESCO). Tourism is venerated as one of the most important economic sectors and social activities that can magically transform the lives of the citizenry both in the global north and global south (UNWTO, 2002). The tourism sector has been praised for its direct contribution to the world`s GDP, generating foreign currency, stabilising balance of payments, employment creation and is a major export sector for many countries (WTTC, 2017).

Richardson (2000) opined that circumstances in the broader macro-economic environment would continue to change at a more rapid pace than witnessed before at global level, hence making the long term future extremely difficult to predict for tourism operators. Given the fluidity of the operating environment, central government and tourism operators should constantly exchange notes for mutual benefit. Adjustments would need to be made where it matters most and strategic plans need to be re-visited at both government and industry sub-sector level.

Conceptual framework

This study attempts to apply the community construct on Zimbabwe`s tourism industry. The construct in this study is framed as the tourism business community (TBC) collectively referring to Zimbabwean tourism operators who have varied business interest within the country`s tourism space. Within the Zimbabwean tourism development rubric, the author is not aware of any study that has applied the community concept in an endeavour to comprehend the challenges confronting the tourism business community. Agrawal and Gibson (1999) identified three components of a community at a basic level. These are: community as a spatial unit, community as a homogeneous social structure, and community as a set of shared norms. Whilst it is clear that the above three parameters capture the ideals of 'community' communities on the ground seldom reflect those ideals. In concurrence, Leach *et al* (1999) unpacked a community as a homogeneous, bounded social group whose members share striking characteristics distinguishing them from outsiders. Such groups may include people of a local administrative unit, key players in a specific economic sector, for example, the tourism sector, or of a group of members bound by the common economic interest. A community, according to these scholars, also has an economic or business component. In this perspective, a community exists where leadership and community participation coordinate to achieve the economic interests of the group.

The community construct is equally applicable to Zimbabwe`s tourism sector that has key players ranging from hotels, lodges, tour operators, travel agents, restaurants, regulatory bodies, and aviation bodies. All these players are not necessarily homogeneous but are bound together by their common interest in the tourism economic sector. Ostrom, (1990); Ostrom *et al*, (2002); Agrawal and Gibson, (1999) posited that a community exists where people organise themselves with the purpose of sustainable management of their national resources through the application of knowledge, norms and institutions. To this end, the Zimbabwe tourism business community institutionally organised as the case with the Zimbabwe Tourism Authority (ZTA), Hospitality Association of Zimbabwe (HAZ), Zimbabwe Business Council for Tourism (ZBCT), The Boating Association of Zimbabwe (BOAZ), Zimbabwe Professional Hunters and Guide Association (ZPHGA), Zimbabwe Tour Operators Association (ZTOA), Association of Zimbabwe Travel Agents (AZTA), Zimbabwe Parks and Wildlife Management Authority (Zimparks), Safari Operators Association of Zimbabwe (SOAZ), and The Zimbabwe Vehicle Rental Association of Zimbabwe (ZVRAZ).

Murphree, (2004) further argues that for tourism development, the concept of community assumes a close geographic match between the community of users and the resource upon which tourism entrepreneurial activities are taking place. More often, multiple communities may have claim to overlapping resources. In the case of Zimbabwe tourism business community, all tourism operators have claim to the tourist attractions like Victoria Falls, Great Zimbabwe, Lake Kariba and the dam wall and the Eastern Highlands, fauna and flora which Zimbabwe is well known for around the globe. In criticising the naive concept of community as a homogeneous social structure, Agrawal and Gibson (1999) suggest that the concept often assumes a group with similar endowments and common traits.

These writers also note that this homogeneity is assumed to improve the chances for cooperative solutions, reduce hierarchical and conflictual intentions, and promote better resource management for tourism growth. The notion of community as 'common interests and shared norms' flows from homogeneity and shared characteristics (Agrawal and Gibson, 1999). Given the above outlined limitations, Agrawal and Gibson (1999) suggest that community be viewed accurately from a political stand point. Communities are therefore made up of different stakeholders with a variety of defining characteristics ranging from line of business, economic sector, and ownership. Tourism operators in Zimbabwe as a business community are affected by the macro and micro operating environment. The theoretical contribution of this study is that it applies the community concept to Zimbabwe at national level in the tourism economic sub sector. There seems to be no studies that have attempted to do this in a multi- currency trading environment, therefore the study would provide baseline information in this area with limited conventional literature.

Zimbabwe tourism sector and its economic significance

The Zimbabwean government recognises that the Zimbabwean tourism sector is at a critical juncture, as the country is pushing to resuscitate the economy that has suffered neglect for the past two decades. The challenges bedevilling tourism operators if not addressed in the short to medium haul, may morph into a full scale crisis with the potential to reverse the gains made in the tourism development trajectory. It is also critically important for the tourism sector to keep abreast of the global trends that would impact the tourism industry and take pro-active measures ahead of time. While the tourism industry has performed commendably well over the years, visitor reviews show that destination Zimbabwe has become a tired product that is in urgent need of rejuvenation in order for it to maintain its edge in a highly competitive global market place. Tourism contributes quite significantly to Zimbabwe`s GDP, providing enormous investment opportunities and employment and is a major source of foreign currency (Ministry of Finance, 2015; RBZ, 2016). Historically, the direct contribution of tourism to the country`s GDP has been around 12 per cent, and employment levels have been in the region of 200 000, from a visitation level of 2 million tourists (ZTA, 2000). At present, there is a cumulative body of evidence that clearly indicates that the operating environment in Zimbabwe`s tourism sector is not conducive to operators through reduced tourism activities and tourism demand.

Efforts to revive the tourism sector in Zimbabwe

Cognisant of the tourism sector`s potential contribution on the economic development agenda front, the government came up with a number of intervention policy measures to speed up the development of the sector, including the granting of tourism development zone status on selected towns and cities, waiving of payment of duty upon importation of tourism capital goods, and as well as availing a USD15 million tourism fund facility at the RBZ (NewsDay, 2018). In Zimbabwe, Victoria Falls, Mutare, and Beitbridge have been earmarked as Tourism Special Economic Development Zones as a way of luring capital investment in these areas. However, despite these interventions there seems to be no respite to the challenges bedevilling the tourism business community in Zimbabwe. The GOZ`s multiple tourism interventions whilst commendable, are however silent on the way forward in tackling these challenges in the short to medium term. The challenges are of industrial scale; and no study has yet documented them despite the fact these challenges are exerting a heavy toll on profitability and sustainability of local tourism operators` businesses. For the GOZ to realise its ambitious target of transforming Zimbabwe into a middle income country bracket by 2030 the tourism sector should play a significant role in the attainment of the set target. Therefore, before a new course is taken for Zimbabwe for the future development of the tourism sector, it is important to first have a comprehensive understanding of the challenges besetting the sector at micro level, and how the challenges dovetail to global tourism trends and tourism mega drivers, in order to formulate appropriate policy and strategic responses to build a more competitive and sustainable tourism sector.

To remain afloat, the Zimbabwean tourism industry must become a dynamic organism as advocated for by Porter (2005) and Kotler (2000). This calls for consistent adjustment of tourist offerings, with proper alignment to the changing market dynamics. Scrutiny of emerging trends in the economic environment should inform the tourism business community`s re-tooling trajectory to ensure success. Only strategic plans informed by market fundamentals must be implemented. In keeping with the current administration`s 2030 vision, one would argue that the key principal determinants that would impinge on Zimbabwe`s tourism industry growth trajectory could be summed up as entrenching the ease of doing business, normalisation of relations with key western source markets and providing adequate financial resources to the tourism fund facility (ZBCT, 2017; ZTA, 2016).

In order to come up with a comprehensive solution to Zimbabwe`s tourism operators` dilemma, the GOZ should engage in dialogue with the tourism business community. Zimbabwe is one of the most progressive and promising young democracy state that has endured a traumatic political and economic spell since independence from Britain in 1980. As the country is emerging from a decade long political and economic instability, and international isolation and trying to find her feet, its tourism sector faces enormous challenges. The country has taken an important first step towards rebuilding its fractured political system and shattered economy through embracing the ease of doing business approach. The GOZ`s resolve to rejoin the Commonwealth grouping, inviting western countries to observe the July 2018 national plebiscite, the current re-engagement drive, and scaling down of numerous police roadblocks are some of the giant steps taken to reintegrate the country back into the global family of nations. Equally important is the potential role the private sector could play in fostering socio-economic development as part of the government`s broad economic re-construction efforts. Tourism has been tipped as one of the key pillars to turn around the fortunes of the country. However, the tourism sector`s role as a catalyst in the reconstruction efforts currently underway may be blighted by a myriad of challenges currently affecting it.

The Ministry of Finance and Economic Development (2016) intimated that tourism is not only Zimbabwe`s prime number one sector, but also the country`s greatest hope for economic salvation in the short to medium term. Therefore a non negotiable approach must now be adopted to ensure that an enabling operating environment is created to bolster and sustain the sector. It is therefore vital that in addition to the reforms being undertaken on the economic front, the holding of a credible and peaceful poll in 2018 was equally critical in strengthening cooperation of regional and international partners and unlocking the much needed investment for the country (First Quarter Budget Review Performance and Outlook Report, 2018).

The Zimbabwean economy is currently grappling with a multiplicity of obstacles including capital flight, rising informal sector, under production, high and unsustainable import bill, and a huge fiscal deficit. The country continues to experience a binding liquidity crisis manifested through structural deficiencies and distortions in the economy punctuated by dwindling capital inflows and leakages, poor infrastructure and weak confidence. Capacity has been constrained by high production costs and shortages of foreign currency. To illustrate the gravity of the situation on the ground, official records show that the MOTHI was allocated a paltry USD5.1 million in the 2018 national budget. This is the ministry portfolio that should be an arrow head in reviving the tourism sector but it is seriously underfunded. The thrust of this ministry is to strengthen destination marketing, paying close attention to high value markets as a way of shoring up tourism receipts.

Two prominent hotels in Beitbridge, that is, Beitbridge Express hotel and Rainbow hotel closed shop in 2016 against the backdrop of low room occupancy and hostile business environment. This is a development that does not make positive reading in Zimbabwe`s quest to resuscitate its tourism sector. Market factors encapsulating depressed occupancy, low margins and high operating costs were cited as the reasons for closure of these two facilities. Hopes of a quick economic turn -around appear to be fading as more and more companies close shop, throwing tens of thousands of workers into the streets. Tourism related organisations are downsizing and scaling down operations citing liquidity crisis among a plethora of other factors. It has been highlighted that Zimbabwe has one of the most uncompetitive business environment and is ranked among the worst in terms of doing business. The country has also remained unattractive to international financing largely due to a huge external debt estimated at about $15 billion. This has resulted in the unavailability of long term cheap financing. Zimbabwe is understood to be owing AfDB $600 million, and despite clearing an IMF $108 million debt, fresh funding still eludes Zimbabwe since the international lending institutions operate using the par-passu rule.

Of late the GOZ amended the indigenisation and economic empowerment act so that it is pro-business. The revision of the extreme 51/49 per cent requirement saw the policy being restricted to natural resource based investments. The 51/49 per cent threshold is now only applicable to the diamond and platinum sectors. This is consistent with the objectives of promoting the ease of doing business environment. Going forward it was anticipated that an undisputed and globally endorsed 2018 election outcome would result in an economic take off in the positive direction regardless of who wins the race between the two top contenders of the major political parties. Conversely, the election was disputed and the economy is in a tailspin as confidence drops.

Road to dollarization of the Zimbabwean economy

This section provides an overview of land mark events that led destination Zimbabwe to adopt a multi-currency trading system and the political and economic conundrum she is in now. Spamandhla and Zondi, (2001) contend that after a fine run from 1980 to the early 1990s, the GOZ instituted a land reform in 1999 that sought to address the racial imbalances in land ownership in Zimbabwe. The program did not sit in well with western countries, who subsequently slapped Zimbabwe with economic sanctions or restrictive measures. The chain of events led to Zimbabwe pulling out of the Commonwealth grouping, after a series of disputed election results. Bad publicity around Zimbabwe`s electoral processes further entrenched negative market perception in key source markets. In the throes of deep political and economic dire strait Zimbabwe defaulted to pay the IMF and WB debt which resulted in the freezing of further lines of credit (Zondi and Siphamandla, 2011). The hyperinflationary pressures spawned an acute shortage of basic commodities, fuel, and drugs. GOZ`s poor human rights record further isolated the country. The year 2008 was epic in that there were hotly contested presidential and house of assembly plebiscites, which were however inconclusive, thus triggering a political settlement that ushered in the formation of the government of national unity (GNU) in 2009 between the ZANU PF and MDC political formations.

The consummation of the GNU in 2009 officially dollarized the economy. Inflation stabilised and the supply of basic commodities normalised. To date, almost ten years down the line the economy is receding due to the liquidity crunch and a multiplicity of other challenges which dollarization played midwifery. In November 2017 there was a change of guard at the higher echelons of the ruling party ZANU PF and government. The new administration came with the narrative Zimbabwe is open for business, riding on the ethos of a reformist agenda, and quickly revised the Indigenisation and Empowerment Act, and sought to restore broken relations with the international community. The sum total of the above catalogued events warrant the Zimbabwe tourism community to re-tool.

Economic significance of tourism

Tourism is viewed as an important sector in many countries, due to a number of advantages and economic growth opportunities it offers. Roe *et al.,* (2004) outlined benefits of tourism as including: source of employment, potential linkages with other sectors of the economy, provides opportunities for off farm diversification, is a foreign exchange earner, generates demand for assets, creates initial demand for goods and services, delivers consumers to the product rather than the other way round, is associated with infrastructural development in remote places and offers a relatively growing market. Given this, both the global north and global south are prioritising its development (Cooper *et al.*, 2001; Bhatia, 2002; Harrison, 2008; WTTC, 2012). The impact of tourism in Zimbabwean economy cannot be overemphasised since independence. The benefits of tourism in Zimbabwe are both direct and indirect in terms of income expenditure brought by tourists and the employment it provides for the local people. Recently, the tourism industry has been affected by the multi-currency trading environment, hence have been vocal in the media urging the government to intervene or act. In macro economics the tourism sector is taken as a source of foreign currency, employment opportunities, contribution to repayment of foreign debt, and increase in income. The tourism sector is undisputedly a source of economic growth, development, cooperation in international market, fosters peace, improves the quality of life, and reinforces the preservation of heritage and local tradition.

Tourism has had its fair share of positive impact on the economy of Zimbabwe. Since tourism is a labour intensive venture that require manpower and has limited barriers, it has created massive employment in Zimbabwe, employing a higher number of women and young professionals. In Zimbabwe the tourism sector is a regionally significant source of livelihood. Whenever the tourism sector flourishes, infrastructure develops, social amenities sprang and the livelihood of the inhabitants thus booms. Tourism is the only export business in which consumption takes place in the home country while being subject to domestic value added tax. Tourism when carefully managed is non extractive and can support conservation measures that raise incomes and provide employment without depriving the country of its resource base. The revenue generated by the tourism sector in every destination helps the government replenish revenue coffers for further development. Revenues from landing fees, departure taxes, VAT, park entrance fee and use of public utilities can make a significant difference to government income base. Although the Zimbabwean tourism industry has had positive and steady growth for over a decade, some factors remain embedded in the economic system that militate against its growth and if these are not addressed, it would have a negative repercussion on the wide economic spectrum. The UNWTO (2001); Beirman (2011) and also Gilhan (2001), impresses that the tourism industry needs a healthy economic environment to in which to operate. It needs policies that stimulate efficiency and competitiveness, and requires adequate resources to ensure that development takes place in an appropriate order.

Methodology

A cross sectional design was used in this study which also adopted a stratified case study approach to draw insights from sixty out of one hundred respondents who were drawn from various tourism-sub sectors like the regulatory body, hotel sub-sector, HAZ professional association, aviation, restaurants, vehicle rental, travel agent and tour operator, academic, MoTHI, and ZBCT. The questionnaire survey was purposively administered only to those operators who were formally registered by the Zimbabwe Tourism Authority. Operators were divided into various strata in view of their line of business. The questionnaire survey yielded an 80 per cent usable returns. Most of the operators had been in business for the past 20 years, and had a minim of 5 employees. In order to uncover the challenges that tourism operators grapple with, the narratives of operators were employed. The researcher conducted simply random selection based on the strata. The data were subjected to a thematic analysis. The questionnaire had questions which sought answers on the current production levels, challenges constraining retooling, effects of dollarization, measures put in place to address the challenges, performance of the organisation prior to and post dollarization, measures put in place to increase capacity utilisation, causes of sub optimal performance, general performance of the broad tourism industry, changes that monetary authorities and other policy makers should effect, and contribution of the tourism sector to the Zimbabwean economy. Thematic analysis identified key emerging themes and dominant narratives contained within the collected texts. Thematic analysis is a systematic process comprising several stages, starting with the assembling of data (Conaway & Wardrope, 2010; Singh, Hu & Roehl, 2007). Open coding was done. Texts were closely and repeatedly read and analysed and were then grouped into themes and sub-themes. To balance on credibility, the researcher conducted the initial analysis and later engaged an ease of doing business expert in the ZIA to independently check for conformity of themes and sub themes generated. Six thematic areas were arrived at, and presented below in the findings section.

Results and discussion

The key challenges constraining tourism business community in the local context were varied. The Zimbabwe tourism business community in this study was constituted by car rentals, hotels, tour operation, travel agency, restaurants, aviation, HAZ, ZBCT, and regulatory authority were grappling with: sub-optimal capacity utilisation, liquidity crunch cum scarcity of foreign currency, high risk country profile, policy inconsistencies, obsolete equipment, devastating effects of restrictive measures, high cost of doing business, and dearth of skilled personnel. These are working against the tourism business community`s re-tooling drive. These challenges are presented now on Table 1 below and are discussed in detail thereof.

Challenge Severity or Ranking	Challenge	Respondents Percentage	UNIVERSE
1	Low capacity utilisation	100%	✓ Car rentals ✓ Hotels ✓ Tour operators ✓ Restaurants ✓ Travel agents ✓ Aviation ✓ HAZ ✓ Regulatory body
2	Liquidity crunch cum foreign currency scarcity	100%	
3	High risk country profile	99.8%	
4	Inter-ministry policy discord	99.8%	
5	Antique equipment	100%	
6	Economic sanctions or Restrictive measures factor	98%	
7	High cost of doing business	100%	
8	Lack of funding	99.9%	
9	Flight of skilled personnel	99.9%	

Table 1. Key challenges blighting tourism operators` retooling efforts

Source: Primary Data, July 2018.

Low capacity utilisation

Tourism business community bemoaned very low levels of capacity utilisation which were as low as 5- 10 per cent. This challenge was ranked as the worst and was placed on severity scale number one. Various respondents from the tourism business community intimated that at the peak of the tourism industry, that is, pre 1999 period, they used to have an 80 to 100 per cent capacity utilisation. The low capacity utilisation was largely attributed to the generally depressed economic environment where demand was at its lowest ebb. This finding is consistent with what was established by Mahinda and Anoma (2003) in East Asia pacific countries whose tourism sector and commerce at large were badly hit by a generally depressed capacity utilisation. Historically, Zimbabwe`s tourism sector has been dependent upon the international markets particularly western markets and following a bilateral dispute between Zimbabwe and Britain, and the subsequent issuance of negative travel advisories on Zimbabwe by a number of countries explains the fall of demand for Zimbabwe` tourism industry. Given such a very low capacity utilisation among the tourism business community, it is extremely difficult for local operators to retool. In order for the retooling process to take off, there is need for business performance levels to improve so that the bottom line improves too and later on plough back the proceeds to recapitalise and operate at full throttle.

Shortage of foreign exchange/liquidity crunch

Tourism business community`s retooling efforts were hampered by the scarcity of foreign currency in the formal market and the obtaining liquidity crunch. Respondents from the tourism community pointed that they are currently battling what they deem as the worst shortage of foreign currency in the history of their business operation in the country. The tourism community explicitly laid bare the dilemma they are facing. One tour operator had this to say:

"In order for me to retool I need to restock first, recapitalise and refurbish my grounded fleet of coaches...among a host of other things and all this needs foreign exchange (the USD) which I cannot get from the bank...but the foreign currency is readily available in the alternative market".

Locally, this is known as the parallel or black market and one should be prepared to pay huge premiums to get USD. It was apparent that tourism operators were literally caught between a rock and hard ground. In the absence of foreign currency there is no hope to retool and without retooling there is no prospect of turning around their business fortunes. The liquidity crunch is exacerbated by low production levels across the sectors of the economy. In financial terms, liquidity is figuratively the oxygen that keeps business operations up and running in a manner reminiscent of what oxygen does to human life. Without optimum liquidity the tourism sector is slowly but surely 'dying', as evidenced by closures of so many establishments in the sector. This ties in well with sectoral statistics released in the first quarter of the year painting a gloomy picture of the tourism sector. One ZBCT official did not mince her words when she said: "... *in the first quarter of last year a record of 100 establishment closed shop or ceased operations due to the devastating effects of liquidity crunch...go to the border town of Beitbridge there is no more Beitbridge Express hotel and Rainbow hotel which have since ceased operating because of the biting shortages of foreign currency".*

The researcher`s independent verification of this claim by the tourism community established that indeed a number of accommodation facilities including these major ones had closed shop. The writer further established that foreign currency was being allocated by the apex bank using its own national priority list that was skewed in favour of the importation of fuel, electricity, medicines, and wheat leaving the tourism business community in a fix. The national tourism body corroborated the sentiments expressed by the tourism community conceding that the liquidity crunch was making destination Zimbabwe a very expensive destination in the region and the unavailability of physical cash in the formal market further escalated the cost of doing business, as well as curtailing refurbishment programmes. The tourism agency conceded that destination Zimbabwe was now extremely difficult to package as it has became too expensive due to the use of hard currencies, however, there was not much that they could do, save to lobby the government to intervene.

High risk country perception

Tourism business community revealed that in their line of business they were a constituency of destination Zimbabwe`s tourism product in the eyes of the international tourism market. They stressed that since Zimbabwe as a nation state was still smarting from two decades or so of political and economic headwinds the international investors and potential visitors alike perceive still perceived it as a high risk jurisdiction especially for purposes of foreign direct investment (FDI). This was actually limiting the local tourism business community`s funding options on account of the high risk perception. One respondent retorted: "*my brother remember 2007, 2008... and fast forward to 2013 and 2017 the country underwent through cycles of political and economic instability...the international community has been watching, you think you can hoodwink then, a big no*". The above scenario gives an impression of country that is in a war zone. This partly explains why the tourism business community is failing to attract lines of credit to retool. Another respondent in the airline sub sector sarcastically pointed out that their reputation had been a victim of the country`s checkered record of defaulting in honouring its financial obligations for lines of credit extended by multilateral financial institutions especially the IMF, WB and AfDB. This reinforced the country`s high risk profile narrative, which is now weighing down the tourism business community operations.

This particular study finding sits in well with the works of Silver (2004) who in the aftermath of the September 11, 2001, terrorist attacks stated there was a shattered sense of security and perceptions of vulnerability in the United States and in the western world in general. The researcher made follow up enquiries with the Ministry of Finance and Economic Development`s treasury department to ascertain the extent of the country`s debt to these international financial institutions. Officials at the treasury department claimed that the country owes its creditors in excess of USD15 billion and hastened to say that very soon they would clear the arrears to unlock fresh capital. It is clear that the debt amount is no mean figure given the moribund state of the country`s economy. To put it in tourism business community`s words, they said: *"This has become an albatross on destination Zimbabwe`s neck, and no amount of rhetoric can take us out of this situation except to pay the debt".*

Despite several debt clearance strategies that have been mooted there seems to be no significant movement in terms of extinguishing the debt. Closely knitted to the high risk profile is the controversial empowerment and indigenisation laws which demanded a 51/49 per cent equity between locals and foreign investors. This has caused constipation in the flow of FDI into Zimbabwe in general and the tourism sector in particular, and in some worst cases has actually driven investment outside Zimbabwe. One hotelier based in Victoria Falls was at pains to say: *"Tourism business is capital intensive, as an operator I need to retool, to spruce up my facilities...and I definitely need the financial support from any creditor, whether local, regional or international. However, as you might be probable aware such lines of credit are not forthcoming in light of the debt legacy issues that the country has with the leading global financiers, so we are stuck. My business is collapsing under my watch"*. Indeed for the country to access fresh lines of credit it must first clear the combined $15 billion debt to the IMF,WD and the AfDB. There is need for FDI in all sectors of the economy which will eventually spur demand for the tourism sector. The poor investment climate in Zimbabwe is actually worsening the country`s profile as too risky. In order for the country to get out of the current quagmire, there is need for international scaffolding.

Policy inconsistency

The tourism business community bemoaned that their retooling efforts were being further scuppered by lack of policy consistency within the GOZ`s line ministries. They particularly identified policy discord in the following line ministries; MoTHI, Home Affairs and Culture, Finance and Economic Development, Empowerment and Indigenisation, Foreign Affairs and International Trade, and also at the level of apex Bank, Local authorities, and ZIA. One official had this to say on the issue of restricting the repatriation of cash: *"The legislated maximum threshold allowed on individuals is USD5000 but the policy is saying USD2000. What is that?"* This does not resonate well with would be investors. The RBZ has however put restrictions on holding and carrying physical cash as a way of managing the critical shortage of physical cash. This actually flies in the face of the Zimbabwe is open for business mantra. Ideally, government ministries, parastatals down to the local authorities should pull in one direction and rally behind one policy direction. Tourism operators as a community were irked by too much posturing, and discord on policies enunciated by government officials which are sending mixed signals to investors. In addition, there was no consistency through-out the economic value chain as a matter of policy on how best to address the cash shortage menace, approval of investment, repatriation of foreign currency, processing of and renewal of operating licences. On one hand, the Foreign Affairs and International Trade ministry, Finance ministry and the RBZ are on an overdrive to re-engage the international community, then on the other hand the Ministry of Youth, Empowerment and Indigenisation is not countenancing on the mandatory 51/49 ownership equity. At the highest level the GOZ is saying Zimbabwe is open for business but quasi government institutions like ZIMRA and RBZ restrict investors to move foreign currency outside the country. Production levels are still very low in Zimbabwe, companies are importing in order to keep on operating yet they are punished by the imposition of these restrictions. Subtle threats of nationalisation are also taking a toll on the performance of the tourism sector, and this has generally caused capital flight thus leaving security of tenure in Zimbabwe seriously compromised.

Antique equipment/undercapitalisation

The tourism business community is operating with very old and broken down production equipment and machinery which have suffered neglect under the weight of economic sanctions. Respondents revealed that the equipment needs a complete overhaul if the retooling drive is to have traction. Without properly functioning production equipment, service delivery is compromised. Machinery that constantly breaks down like the sad scenario at the national airline carrier, worn out or dilapidated rail coaches in the tour agency sub sector, and grounded tour operator coaches are an eyesore to the tourism sector. These lie at the epicentre of service delivery. Respondents opined that most of the kitchen equipment, stoves, catering utensils, aircrafts, coaches and even physical structures of buildings were in a deplorable state that is not consistent with the Zimbabwe is open for business narrative. Production equipment is at the heart of tourism business community`s core business to an extent that without proper capitalisation, any hopes of retooling the industry will remain a pipe dream. One caterer was captured verbatim saying: *" Look at that kitchen... and see how dilapidated it is and worn out industrial stoves which we cannot replace nor service because we do not have hard currency...for your own information this whole building was condemned by the health, safety standards inspectorate division last year but I am still using it I do not have any other option...I cannot just close otherwise I will starve".* Further pressed by the researcher if they were not afraid of closure by the Standards Association of Zimbabwe (SAZ) inspectorate, the operator indicated that they bride the inspectors.

Devastating effects of sanctions/restrictive measures

Tourism business community intimated that their retooling efforts were being curtailed by the restrictive measures imposed on Zimbabwe following the country`s controversial land redistribution exercise. The tourism business community claimed that their members were the most affected by these restrictive measures given the fact that most of their customers are from western countries and the US. Zimbabwe as a nation state was slapped with smart economic sanctions or restrictive measures that sought to discourage economic interaction between Western countries and Harare since the late 1990s. Incidentally, what this meant for local tourism operators was that there was now no smooth flow of funds destined for Zimbabwe. Payment for hotel accommodation bookings, airline seats, destined for any Zimbabwean tourism operator was blocked. Local operators revealed that they lost un-quantified business due to this economic embargo. The sanctions effects did not spare the tourism business community`s procurement departments which buy spare parts and ingredients. Operators further insinuated that Zimbabwe`s FDI drive is also held back by the restrictive measures. One operator was optimistic when he quipped that: *"Now we see a modest increase in foreign and diaspora investment, ...the big money in the mould of China, Russia and other pledges yes indeed they are long-horizon projects ...what we desperately need as tourism operators is a short term economic stimulus to enable us to refurbish and capitalise. The government should do something...we are tired of being reminded that we are blacklisted due to sanctions when we do business with customers from overseas".* The above summed the kind of challenges that operators have to contend with in the current operating environment.

High cost of doing business

Tourism business community complained bitterly about *"...over a dozen of levies and taxes that we are squeezed to pay which are eating into our bottom line".* To start with, the tourism business community indicated that they are required to pay "...*the most contentious 15 per cent VAT that was introduced by the GOZ on tourism products"*. The umbrella ZBCT framed it as an Achilles Heels that will definitely sink the tourism sector if it is not rescinded or revised. Their argument which I found meritous, was that it made the product even more expensive. The tourism sector professional representative body was very vocal, and it impressed upon the researcher that plans were afoot to engage the GOZ on this particular issue. Secondly, tourism business community bemoaned that they have to bear *"...the cost of complying with regulatory authorities, on acquiring and renewing operator licences, health levies, and payment to local authorities were unnecessarily too burdensome and an affront to their members` retooling efforts"*. This finding was in tandem with what was established by Sophal *et al.,* (1999) in Asia-Pacific in which the operating environment was characterised by inefficient state owned enterprises and cumbersome domestic rules and regulations that impeded the development of the tourism sector, much to the chagrin of operators. One operator suggested that: *"...if the authorities are serious to revive the tourism... then they must institute a temporary moratorium on payment of all these levies so as operators we have some space to re organise and retool. Payment of levies is not bad and we are not refusing but we are saying in this current environment the government should hear us...it is for the good of the country`s economy in the long term".* Going through the list of taxes and levies that the tourism business are required to pay ranging from ZBC, ZIMRA, Local councils, Liquor licence, Health and Safety, 2% tourism levy and VAT the writer was convinced that indeed the cost of doing business in Zimbabwe for tourism business community was too prohibitive since it impacted adversely on operators` competitive advantage. After factoring in the cost of doing business into the price of the product, local operators find the tourism product very expensive as compared to their regional counter parts. The study finding conforms to advisories issued by investment institutions to the effect that generally Zimbabwe has the most prohibitive operating environment as compared to regional and international ratings. This does not bode well for tourism business community`s retooling efforts.

Lack of skilled personnel and brain drain

Tourism business community`s retooling efforts were harm-strung by a depleted skilled human resource base. One respondent said*: "My organisation lost more than half of its skilled personnel due to brain drain to neighbouring countries like South Africa and Botswana and overseas countries like the UK, Canada, and Australia since the late 1990s. The tide has not changed ever since then and we have not been able to replace such personnel...but we are now relying upon trainees"*. *Given the harsh economic environment we have not been able review salaries upwards and this coupled with general anti-social working hours characteristic of the tourism sector we are struggling to attract skilled personnel with hands on acumen, and this has not worked in favour of the organisation`s retooling effort"*. Most tourism establishments have become training grounds for fresh graduates who upon qualification, quickly join the trek into the region in search of better opportunities. Financial resources are sunk into the training and development of human resources on yearly basis but the sector is failing to retain the personnel. The flight of skilled and experienced personnel impinge on service delivery. The dearth of a properly skilled human resource base capital has the potential to push the sector off the rails. This finding corroborates what was documented by the World Bank (2010) in Kenya where it was established that Kenya`s tourism sector`s workforce failed to deliver a consistent world class tourism experience due to its limited capacity. This was exacerbated by non replacement of skilled personnel who quit the employ in search of better opportunities. The reality on the ground is that the tourism business community is now depending on students who are on in-house internship programs to fulfil vital roles.

Lack of funding

The tourism business community highlighted that despite the existence of the MOTHI portfolio, and policy pronouncements made by the government to prioritising the sector still funding was not availability to help operators to retool. Operators are actually struggling with routine refurbishment issues. Respondents acknowledged the $15 million facility earmarked for the tourism sector availed by the RBZ, that is being administered through local banks. However, the tourism business community was strongly opposed to the stringent conditions attached to the fund facility. One operator had this to say: *"The fund is lying idle, I cannot benefit from it I am required to be fully compliant with other regulatory requirements like formal registration, payment of the 2 per cent tourism levy, ZIMRA`s tax clearance, and these are the issues that being contested by tourism operators"*. This finding is similar to what Sophal *et al.,* (1999) established in Asia where many operators could not access any form of funding since both domestic and foreign credit had dried up during the 1997/98 financial crisis. Surprisingly, some tourism operators professed ignorance with regard to the availability of such a tourism facility and it is incumbent upon the line ministry and regulatory body to avail such information to their membership so that they can benefit from it given the dire situation on the ground.

Tourism business community`s mitigation

In an attempt to address the above outlined challenges the tourism business community, indicated that they jointly packaged their tourism products with Kenyan and South African tourism operators in which case the Zimbabwean packages were an extension. They have also cut back on their profit margins as a way of enhancing product competitiveness in the marketplace. To address cash shortages, the tourism business community indicated that they had embraced the use of plastic money, introduced POS, accepted the use of debit cards, RTGs, and credit cards. Still some operators revealed that they had unbundled the straight jacket pricing policies, and running promotions like price reductions to attract more tourists. These intervention measures by tourism industry sub-sectors have somewhat eased pressure on operational challenges for the present time.

In effort to boost capacity utilisation the tourism business community operators impressed that they had liaised with suppliers, conducted road shows in various markets, whilst others reduced fares and rebranded. Professional association bodies indicated that non subscribing members were no longer receiving information hence forcing them to subscribe. The regulatory body intimated that they had introduced penalties for non compliance, or outright closure of facilities as a way of making sure that operators were registered.

In view of the key challenges confronting the tourism business community it was suggested that monetary authorities should make cash available. This suggestion was made after taking into account that Zimbabwe had become an extremely expensive destination, caused mostly by the cost of running business, therefore going forward monetary authorities should maintain the multi currency regime until the economy has somewhat stabilised. There was need for a currency system that is strong in order to restore trust in tourism investors. Monetary authorities should not let the country depend on bond notes which do not have international recognition. Fundamental changes were suggested on the investment policy thrust and particularly on the indigenisation one as a way of restoring investor confidence levels. The recent revision of the indigenisation law, the 51/49 strictly restricting it to the diamond and platinum extractive sectors was applauded as the first step in the right direction to tackling the high risk country profile perception.

Tourism business community operators suggested a constant conversation between MOTHI and other tourism related government ministries in order to bring sanity to the country`s pricing system. MOTHI was implored to lobby for an improved budgetary support for the industry so that the national tourism lead agency is capacitated to effectively market destination Zimbabwe. It was also noted that it would be in the best interest of the tourism business community if there were relaxation of some of the regulations so that tourism operators could recover. Equally the same, trade association like HAZ, and the ZBCT were suggested to lobby more for pro-tourism statutory instruments (SIs) that enable the tourism business community to refurbish and buy car rental equipment either duty free. There is need to plug the loopholes since the facility was abused.

Turning to the national regulatory body and government, after noting that the trading environment in Zimbabwe is extremely hard for the tourism business enterprises, it was suggested that a one stop investment centre be established as a way of cutting down on burdensome red tape. There was also a feeling among the tourism business community that the bye-laws were designed to discourage tourism entrepreneurship in Zimbabwe. To back up such a claim it was pointed out that, for example, for registration with the State Procurement Board one should to pay $110, to get a vendor`s number one need to pay $200 or $300 , registration with the ZTA $200-$500 is required, to get city council trading licence one has to part with $200, plus bank charges ranging from $30-$100 with or without sales. This is a negation to the spirit of entrepreneurship.

Conclusions and implications

In view of the extremely difficult operating environment characterising destination Zimbabwe, it is clear that external scaffolding and injection of fresh capital are the ease route to salvage the challenges. The first step to achieve this, is for the GOZ to re-set relations with the progressive international community. Tourism is all about good relations with other nations. Given the fact that the GOZ has set itself an arduous economic turn- around plan of turning the country into a middle income country by 2030 anchored on tourism, for this vision to be a reality a conducive operating environment for the tourism business community is a pre-requisite.

On the marketing front of destination Zimbabwe, the national tourism lead agency need to revisit its marketing strategy that surely should not remain as it was since 1980, given the dynamics that have taken place in the tourism market sphere, it is now time to sharpen its marketing tool box for tangible results. For destination authorities in Zimbabwe it is clear from the above analysis that Zimbabwe`s operating environment has been punctuated by predatory business behaviour that has caused the tourism sector anaemic. Policy pronouncements and economic blue prints should be informed by what is obtaining in the macro operating environment.

The study concludes that the tourism business community in Zimbabwe has very little space to manoeuvre to extricate them from a very hostile operating environment. To turn the tide in favour of the tourism business community it is wise for the GOZ to urgently rescind the 15 per cent VAT on tourism accommodation, relax the stringent conditions attached to the $15 million tourism support facility availed through the RBZ, and providing a lasting solution to the liquidity crunch.

This study analysed the challenges affecting the tourism business community in Zimbabwe`s current multi-currency trading regime. It also sought to assess the policy environment around the tourism sector in Zimbabwe, has identified constraints to the re-tooling efforts by tourism operators. The challenges confronting the tourism business community can be summed up as low capacity utilisation, liquidity crunch, high risk country profile, policy discord, obsolete production equipment, restrictive measures, high cost of doing business, brain drain, and lack of funding.

Future research could explore the ease of doing business in Zimbabwe`s tourism sector and compare it with international best practices.

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