An assessment of brand Zimbabwe's competitiveness and attractiveness as a tourism destination

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DECLARATION

I, Erisher Woyo, ID Number 04-130438-F-04, passport Number BN848771 and student number 26762145, do hereby declare that, this research submitted to the North-West University, Potchefstroom Campus, for the PhD study: **An assessment of brand Zimbabwe's competitiveness and attractiveness as a tourism destination,** is a result of my own work, and it complies with the University's code of Academic Integrity, as well as other relevant procedures, policies, rules and regulations of the North-West University. This study has not been previously submitted in part or in full for a degree or diploma in any university or college by me or any other person. To the best of my knowledge, this research contains no materials previously published or written by another person except where due reference is made in the thesis.

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ABSTRACT

The global tourism market is characterised by growing competition. Tourism destinations are competing for tourism arrivals and investments. Therefore, creating competitive and attractive destinations has been paramount in recent years. Destinations have responded to the growing competition and decline in tourist arrivals by means of increasing branding and marketing expenditure. The economic woes of Zimbabwe started in 2000 when the government embarked on a land reform programme. Land reform attracted a lot of resistance from the international community, with a number of Zimbabwe's source markets warning their citizens not to visit Zimbabwe because it was not a safe destination. Thus, the tourism sector witnessed dwindling tourist arrivals and the market share for Zimbabwe was lost to competitors such as South Africa, Botswana and Namibia.

Contested elections of 2002 and 2008 as well as untamed hyper-inflation further worsened the situation. These challenges eroded the equity of the country's brand tag: ***Africa's Paradise.*** As a result, efforts were made to rebrand the country into ***Zimbabwe:* A World of Wonders.** Zimbabwe has been involved in destination branding since the country gained independence from Britain in 1980. Destination branding, competitiveness and attractiveness have been researched in a number of tourism contexts. However, studies that either or jointly links destination branding with destination competitiveness and attractiveness are limited and more specifically so in a Zimbabwean tourism context. Additionally, studies that assess the concept of competitiveness and attractiveness using demand and supply perspectives are also lacking in a tourism context. As a result, the following research question was therefore formulated: What are the factors influencing competitiveness and attractiveness of brand Zimbabwe as a tourism destination? Between the attractiveness factors, what are the significant contributors of destination brand loyalty? Between the competitiveness factors, what are the significant contributors of prosperity of destination residents and investments?

The primary goal of the study was to develop a competitiveness and attractiveness assessment framework for brand Zimbabwe as a tourism destination. In pursuance of this goal, the study formulated four key objectives. The first objective of the study was

to evaluate destination branding as a strategy for building competitive and attractive destination brands. This objective was achieved by means of reviewing literature. The definition of a brand and destination brands were analysed and discussed. Further analysis was done on destination branding as a concept. The implications of destination branding elements were discussed. It was established that, research that links destination branding with competitiveness and attractiveness is limited. The complexity of destination branding was also established.

The second objective of the study was concerned with the analysis and examination of competitiveness and attractiveness from a destination perspective. This objective was achieved by means of analysing literature on destination competitiveness and attractiveness. The analysis focused on the measurement of these aspects. Appropriate academic foundations about the definitions, origins and classification of models were also discussed and analysed. It was established that, competitiveness and attractiveness are complex aspects of destination research. Research that addresses these concepts using demand and supply perspectives is lacking. Inconsistence was also established with regard to the measuring dimensions of both aspects.

The concern of the third objective was to assess brand Zimbabwe as a tourism destination with respect to its competitiveness and attractiveness. The aim was to identify the significant factors that influence the competitiveness and attractiveness of Zimbabwe as a tourism destination. In pursuit of this objective, data were collected using demand and supply perspectives. Therefore, two surveys were done by means of self-administered questionnaires. Demand questionnaires were distributed to international tourists visiting Victoria Falls, Harare Great Zimbabwe and Eastern Highlands. Five hundred questionnaires were distributed. 450 demand questionnaires were captured for analysis. Supply questionnaires were distributed in the same tourism attractions as was in the demand survey. 320 questionnaires were distributed. Three-hundred and one were returned and captured for analysis.

In achieving the third objective, the study applied statistical analyses such as exploratory factor analyses, independent *t*-tests, one-way analysis of variance, Spearman's rank order correlations and multiple stepwise regression analyses.

Exploratory factor analyses were performed on items that were used to measure attractiveness and competitiveness of Zimbabwe as a tourism destination. From the demand results, 12 factors were revealed while 14 destination competitiveness factors were identified. The rank order correlations were used to determine the relationship between destination attractiveness factors using demand results. The same logic was applied for the supply results with regards to the Spearman's rank order correlations. The study used independent t-tests to determine the influence of gender on the destination attractiveness factors. One way analysis of variance were applied between groups in both demand and supply results as a way of determining the impact of selected variables on destination attractiveness factors (demand results) and destination competitiveness factors (supply results). Both destination attractiveness and destination competitiveness factors were used in stepwise regression analyses to determine significant predictors of destination brand loyalty (demand results) and predictors of destination prosperity (supply results).

The results of the study showed the most important destination attractiveness factors for Zimbabwe include destination ambiance, destination attractions and tourism amenities. Zimbabwe's attractiveness was found to be affected by the price factor and external access. The most important competitiveness factors of Zimbabwe were identified in this study as satisfaction recommendations, destination quality and cultural attractiveness. As with the demand results, the competitiveness of Zimbabwe is greatly affected by its pricing model. Significant predictors for brand loyalty in the empirical context were found to be destination environment, destination brand identity, and destination brand image and destination ambience. The predictors of destination prosperity and investment competitiveness in the empirical context of Zimbabwe were found to be satisfaction recommendations, destination branding outputs, satisfying brand experiences, cultural attractiveness, brand strategy effectiveness, price, politics and policies. Results of this study confirmed that destination attractiveness and competitiveness factors are multi-faceted. The competitiveness and attractiveness framework was therefore modelled based on key results and literature.

The last objective of the study was concerned with drawing conclusions and making recommendations. This study makes three contributions. The first contribution is done from a theoretical perspective. This study is one of the first to examine the link between

destination brand and destination competitiveness and attractiveness, even more so in the context of Zimbabwe. Additionally, another theoretical contribution lies in the fact that, it is one of the fewer studies that addresses both concepts in a single survey. The development of the competitiveness and attractiveness assessment framework is therefore a significant contribution to literature and can further be tested in future studies. The second contribution of the study lies in its methodological approach. The key variables of the study were measured from a demand and supply perspectives, as most of the studies have only measured the variables either from a demand or supply side. Reliable and valid instruments for measuring competitiveness and attractiveness in a developmental context was developed and added to the scholarly content of this field of study. The practical contribution of the study was done by means of developing a context-specific competitiveness and attractiveness assessment framework. The framework can be used by destination managers to attract and maintain tourists that are loyal and at the same time increase the prosperity of destination residents. It can also be used by practitioners in Zimbabwe to improve the status of this country as a tourism destination.

Keywords: destination; destination branding; destination competitiveness; destination attractiveness; effects of branding; country branding; national branding limitations of competitiveness models and Zimbabwe.

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LIST OF ACRONYMS

DMO   -   Destination Marketing Organisation

UNWTO   -   United Nations World Tourism Organisation

WEF   -   World Economic Forum

WTTC   -   World Travel and Tourism Council

ZIMSTAT   -   Zimbabwe Statistics Agency

ZTA   -   Zimbabwe Tourism Authority

CHAPTER 1

INTRODUCTION AND PROBLEM STATEMENT

"Advertising people who ignore research are as dangerous as generals who ignore decodes of enemy signals." - David Ogilvy

1.1 INTRODUCTION

The tourism industry has been developing at a quicker pace in the last 3 decades (Pestana, Laurent, Nicolas, Elisabeth, Bernardin & Assaf, 2011:141). The development of tourism is attributable to an increase in purchasing power and decreasing transport costs (Kozak, Kim & Chon, 2017:569; Pestana *al.*, 2011:141). 1.8 billion international tourists are expected to visit global tourism destinations by 2030 (UNWTO, 2003). In 2014, 1.1 billion tourists were recorded globally (UNWTO, 2015). Therefore, as the industry grows, management and marketing of tourism destinations are increasingly becoming more competitive (Ayikoru, 2015; Balakrishnan, 2008; Buhalis, 2000:98; Du Plessis, Saayman, & van der Merwe, 2015; Hudson & Ritchie, 2009; Tasci, 2011; UNWTO, 2012, 2013). Zimbabwe as a tourism destination reached a peak of 2 million international visitors in 1998 before the government went on a land reform exercise that resulted in tourist numbers plummeting to unprecedented levels (Mkono, 2012:206). As a result of the land reform exercise, Zimbabwe was labelled an unsafe destination by its major markets. Zimbabwe developed new marketing and tourism strategies as a way of restoring a tattered brand image that was birthed following the controversial land redistribution programme (Mkono, 2012: 206).

Tourism destinations globally have responded to the decline in visitor numbers, market share and tourism revenue through a corresponding increase in marketing and branding expenditure (Buhalis, 2000; Cracolici & Nijkamp, 2008; Hosany, Eckinci, & Uysal, 2007; Mazanec, Wober & Zins, 2007; Mkono, 2012; Pike & Page, 2014; Ritchie & Crouch, 1993; Wang, 2011; Zhang & Jensen, 2007). A more poignant justification towards the increase in marketing expenditure by tourism destinations has been the cumulative international competition, and, the consciousness that novel destinations are budding, and offering modern sophisticated tourists with an assortment of

alternatives (Ayikoru, 2015; Balakrishnan, 2009; Buhalis, 2000; Dwyer, Edwards, Mistilis, Roman & Scott, 2009). Destination marketing is recognised as a crucial component for the promotion of future sustainable tourism growth (UNWTO, 2011). As a result, a number of destination marketing strategies have been formulated in recent years (Hosany *et al.,* 2007; Pike & Page, 2014; UNWTO, 2011; Wang, 2011).

Mossberg and Getz (2006:308), argue that branding as a theory has sufficiently been used in the context of goods. However, branding is also widely documented as an important marketing strategy tool for tourism destinations (*see* Cai, 2002:720; Gnoth, 2007:345; Hankinson, 2005:24; Hankinson, 2007:240; Konecnik & Go, 2008:177; Mossberg & Getz, 2006:308; Oh & Hsu, 2014:156; Pike & Page, 2014; Tsai, Lo & Cheung, 2013:866). Despite such a growing stream of literature, research that has empirically investigated relationships that exist between destination branding and destination competitiveness and attractiveness is limited. The increase in destination marketing and branding spending efforts as a panacea to plummeting tourist arrivals, tourism revenue and market share has resulted in limited results (Vengesayi, 2003:637). It is against this background that this study seeks to assess of brand Zimbabwe's competitiveness and attractiveness as a tourism destination.

The purpose of this chapter is to define the research problem, briefly discuss the methods of research that were applied in this study, describe literature review, define concepts, state the main goal of the study as well as outlining the classification of the study's chapters.

The next section discusses the background of the study.

1.2 BACKGROUND TO THE STUDY

Global competition in the tourism market is increasing (Ayikoru, 2015; Balakrishnan, 2009; Du Plessis, *at al.,* 2015; Hudson & Ritchie, 2009; Miličević, Mihalič & Sever, 2017; Pike & Page, 2014; Reitsamer & Brunner-Sperdin, 2017; Tasci & Denizci, 2009; UNWTO, 2011; Wang, 2011). Due to competition, 70% of international arrivals are visiting ten major tourism destinations such as France, the United States, Spain and China, with the remaining number of tourists being shared by the rest of the global tourism destinations (Morgan, Pritchard & Piggot, 2002:334; UNWTO, 2017).

Therefore, it is clear that tourism destinations are directly competing with each other more than before (Anholt, 2007; Buhalis, 2000; Reitsamer & Brunner-Sperdin, 2017:55). Competition for tourists is more intense with lesser-known tourism destinations.

The competition challenge is exacerbated by the substitutability of tourism destinations (Ayikoru, 2015:142; Hudson & Ritchie, 2009:217); growth in emerging destinations (Buhalis, 2000) as well as the ever-changing tastes and preferences of tourists (Tasci & Denizci, 2009; Dwyer *et al.,* 2009; Dwyer *et al,.* 2010; Dwyer, Cvelbar, Edwards, & Mihalic, 2012; Hudson & Ritchie, 2009). Globalisation and advances in technology are putting competitive and attractive pressures on tourism destinations (Buhalis & Law, 2008:619). The influence of social media on tourist behaviour with regards to destination choice has also exacerbated the competitive and attractive burdens of tourism destinations (Law, Buhalis & Cobanoglu, 2014). Consequently, "destination marketing and destination brand development have become strategic tools due to ever-increasing competition among destinations" (Miličević *et al.,* 2017:210). The need to develop unique, competitive and attractive destination brands is now urgent for a majority of tourism destinations (Hudson & Ritchie, 2009:217; Reitsamer & Brunner-Sperdin, 2017:55). Zimbabwe as a tourism destination, therefore need to develop a unique, competitive and attractive destination brand.

Competitiveness is a crucial determinant of the success of organisations, industries, regions and countries in the long-term (Buhalis, 2000; Dwyer *et al.,* 2009; Dwyer *et al.,* 2010; Kozak & Rimmington, 1999; Porter, 1980, 2009; Zehrer, Smeral & Hallmann, 2017:55). In a tourism context, competitiveness is explained by the destination's capacity to provide goods and services that are perceived to be superior by tourists (Dwyer & Kim, 2003). The sufficiency of tourism resources is no longer enough to determine the competitiveness and attractiveness of tourism destinations (Bordas, 1994 cited in Vengesayi, 2003:637; Hudson & Ritchie, 2009:217). Emerging tourism destinations are increasing the level of competition that destinations are facing (Buhalis, 2000:113; Krešić & Prebežac, 2011:497). This resulted in the adjustments of branding and marketing strategies (Krešić & Prebežac, 2011:497). However, because of substitutability challenges (Ayikoru, 2015:142; Hudson & Ritchie, 2009:217),

destinations are now focusing their destination marketing strategies on building unique, competitive and attractive destination brands (Krešić & Prebežac, 2011:497).

There is a growing attention among researchers with regard to the concept of competitiveness in a tourism destination context. However, empirical studies that focus on the relationship between destination branding and destination competitiveness remains limited (Miličević *et al.,* 2017:209; Voggler & Pechlaner, 2014:64). Just like competitiveness, the relationship between destination branding and attractiveness is also limited. Destination branding is recognised as an important aspect of tourism success in the context of tourism literature (Cai, 2002; Konecnik & Go, 2008; Miličević *et al.,* 2017:210; Oh & Hsu, 2014:156; Pike & Page, 2014). The concept of destination branding despite being recognised as an important aspect of destination success has been partially included in destination competitiveness and attractiveness modelling (Miličević *et al.*, 2017:211).

Destination branding is a part of the destination's development planning and policy (Ritchie & Crouch, 2003). However, the destination competitiveness model of Ritchie and Crouch (2003) does not explain the causality of branding to destination competitiveness, for example. The destination's positioning and image are critical in influencing destination competitiveness (Dwyer & Kim, 2003). While destination competitiveness has attracted more attention, the concept of destination attractiveness has not attracted academic attention at the same level as competitiveness. Therefore, this study also argues that the relationship between destination branding and destination attractiveness is also lacking.

Existing destination branding studies have not fully addressed the assessment of destination brand performance using the concepts of destination competitiveness and attractiveness (Kladou, Giannopoulos & Mavragani, 2015:196; Miličević *et al.*, 2017:211). There is an absence of destination branding scholarship in Zimbabwe, particularly research that links destination branding to competitiveness and attractiveness of Zimbabwe as a tourism destination. There are, however, a few studies that are worth mentioning. Ndlovu and Heath (2013) investigated the effectiveness of rebranding as a tool for enhancing sustainable development in Zimbabwe. Prior to that, Ndlovu and Heath (2010) also investigated the challenges of

branding Zimbabwe as a destination in crisis. However, what seems to be lacking is the broader assessment of the relationship between destination branding with destination competitiveness and attractiveness.

There is an absence of empirical studies that have focused on the measurement of the concept of competitiveness in a destination context (Zehrer *et al.,* 2017:55). The concept has not been sufficiently explored using both a demand and supply perspective (Vengesayi, 2003:644; Zehrer *et al.,* 2017:55). The measurement of destination competitiveness is dominated by subjective measuring items and has been measured mainly from a demand or supply perspective (Zehrer *et al.,* 2017:55). The assessment of destination competitiveness using objective and subjective measures appears to have been neglected so far in the destination competitiveness agenda (Zehrer *et al.,* 2017:55). The measuring items of destination attractiveness are neither classified as objective nor subjective. However, this study relied on both subjective and objective measures in the assessment of brand Zimbabwe's competitiveness as a tourism destination. Additionally, this study assessed brand Zimbabwe's competitiveness and attractiveness using demand and supply side perspectives which is significant.

Examination of destination brand performance metrics has been predominantly a demand side affair (Anholt, 2005a, 2010; Echtner & Ritchie, 1993;, Kladou, Giannopoulos, & Mavragani, 2015). The adoption of supply side perspective in the measurement of destination brand performance is more recent (Balakrishnan, 2008; Blain *et al.,* 2005; Cai, 2002; Hankinson, 2007; Piha *et al.,* 2010). Kladou *et al.* (2015:194), argue that, only three papers evaluated destination branding from a dual perspective of demand and supply. In terms of geographic allotment, research has been dominant in Asia, Australia, Europe, Middle East and North America (Kladou *et al.,* 2015:195). Therefore it is clear that Africa lags in terms of destination branding evaluation research. Evaluation of destination brand performance from both a demand and supply perspective is critical in building and sustaining competitive and attractive destination brands.

1.3 PROBLEM STATEMENT

The global tourism market is increasing and more than 1.8 billion tourists are expected by 2030 (UNWTO, 2003). 1.1 billion international tourists were recorded in 2014 (UNWTO, 2015). In 2012, Africa as a tourism destination attracted 52 million tourists (12% of the global international visitors) (Du Plessis *et al.*, 2015:1). However, this figure has dropped to 29 million visitors in 2015 (World Economic Forum, [WEF], 2017). In the context of Zimbabwe, the tourism industry grew faster after independence in 1980 (Turton & Mutambirwa, 1996:453). It was therefore considered a major contributor towards the country's GDP between 1980 and 1998, a period that was previously known for political stability and economic growth. Additionally, years before the land reform and political crises, the tourism sector in Zimbabwe was one of "the most competitive and attractive destinations in Africa" (Turton & Mutambirwa, 1996:453).

Currently, South Africa and Mauritius are the largest tourism revenue earners in Africa (Blanke & Chiesa, 2013; Du Plessis *et al.,* 2015). In 1998, Zimbabwe was ranked fourth among top African countries behind South Africa, Tunisia and Morocco. However, the tourism industry is one of the sectors hardest hit by the political turbulence from the year 2000 (Mkono, 2010; 2013). Zimbabwe as a tourism destination suffered from negative press due to the political climate that prevailed following the land grabbing exercise. This highly politicised and contentious land reform programme resulted in a decline in tourism arrivals, low occupancies and safety concerns (Mkono, 2013:6; 2010). International arrivals declined as the country further deteriorated into a prolonged turmoil that was defined by a bolt of travel warnings from its source markets (Mkono, 2010). Travel warnings were triggered by worsening diplomatic relations between Zimbabwe and its primary source markets (Mkono, 2010). Several airlines pulled out of Zimbabwe as the situation further deteriorated (Mkono, 2013).

Declining tourist numbers and hotel occupancies in 2008 compounded the tourism industry's challenges. The decline in tourism arrivals and subsequent falling of hotel occupancies were a direct result of political chaos and instability that emanated from contested election results, human rights abuses, economic recession and a barrage of negative media publicity (Ndlovu & Heath, 2011). According to Ndlovu *et al.* (2011),

by the year 2008, Zimbabwe as a tourism destination was fast becoming a tragedy of Africa. Hyperinflation defined the business environment for Zimbabwe and the government failed to address it. This created black markets and cash shortages in the process (Ndlovu *et al.,* 2011). The shortages of foreign currency had multiplier effects that resulted in fuel shortages, loss of consumer spending and confidence.

The political and worsening economic climate affected Zimbabwe's brand image as a tourism destination. During the period of land reform in 2000 and the contested elections of 2008, Zimbabwe's destination brand was *Africa's Paradise*. The economic hardships, sanctions, political struggles, and inconsistent laws disfigured the *Africa's Paradise* brand (Ndlovu & Heath, 2013). *Africa's Paradise*'s brand equity was severely eroded by political chaos, negative press publicity and world record hyperinflation (Mkono, 2013, 2010; Ndlovu *et al.,* 2011). Following the outcome of the contested elections in 2008, Zimbabwe formed a government based on national unity in 2009. The 2009 government "had an immediate positive effect on the tourism sector in Zimbabwe" (Woyo & Woyo, 2016:29). Travel warnings were immediately lifted, as there was sanity in terms of the country's economic and political stability. Airlines revived their interests in flying to Zimbabwe again. The branding messages of *Africa's Paradise* were discarded in 2011 in favour of *Zimbabwe: A World of Wonders* as a way of dealing with the "bad boy" image tag. The objective of the rebranding-exercise was an attempt to reshape Zimbabwe's tattered brand image by enhancing its competitiveness and attractiveness.

While there is documentation on why Zimbabwe changed its brand tags from *Discover Zimbabwe* to *Africa's Paradise* to *Zimbabwe: A World of Wonders;* there is a dearth of research in terms of assessing the relationship between destination branding and Zimbabwe's competitiveness and attractiveness. Therefore, it is imperative to determine current aspects that influence Zimbabwe's competitiveness and attractiveness as a tourism destination brand. Additionally, it is critical for this study to assess the significant factors that contribute to destination brand loyalty and economic competitiveness through the development of a framework. The assessment of brand Zimbabwe's competitiveness and attractiveness factors could help Zimbabwe as a tourism destination to improve brand loyalty and competitiveness. This could lead to

more destination branding effectiveness that could augment Zimbabwe's competitive position in terms of visitor numbers, market share, tourism income, employment etc.

A number of research studies were done on competitiveness from both destination and tourism business perspectives (Ahmed & Krohn, 1990; Andreas-Caldito, *et al.,* 2013; Ayikoru, 2015; Bolaky, 2011; Bordas, 1994; Botha, Crompton & Kim, 1999; Buhalis, 2000; Carmichael, 2002; Chambers, 2010; Čižmar & Weber, 2000; Crouch, 2011; d'Hauteserre, 2000; De Keyser & Vanhove, 1994; Du Plessis *et al.,* 2015; Dwyer *et al.,* 2003; Enright & Newton, 2004; Heath, 2003; Hudson, Ritchie & Timur, 2009; Kozak & Rimmington, 1999; Lubbe, 2015; Mazanec, *et al.,* 2007; Mazurek, 2014; Miller *et al.,* 2008; Pearce, 1997; Saayman & Du Plessis, 2003; Vengesayi, 2003). However, despite the increase in academic attention that has been given to competitiveness in a tourism context, only 8 studies focused on the African continent (*see* Ayikoru, 2015; Botha, 1998; Botha, Crompton, & Kim, 1999; Du Plessis *et al.,* 2015; Heath, 2003; Kim *et al.,* 2000; Lubbe, 2015; Saayman & Du Plessis, 2003; Vengesayi, 2005). Interestingly, South Africa has attracted more research attention on competitiveness in the tourism context (see, Du Plessis *et al.,* 2015; Du Plessis & Saayman, 2017; Lubbe, 2015; Saayman & Du Plessis, 2003).

When compared to competitiveness, destination attractiveness is not a very active area of research as less papers have been published (*see* Backman *et al.,* 1991; Cracolici & Nijkamp, 2008; Deng *et al.,* 2002; Ferrario, 1979; Formica & Uysal, 2006; Gearing *et al.,* 1974; Goodall & Bergsma, 1990; Hu & Ritchie, 1993; Kim, 1998; Laws, 1995; Lee *et al.,* 2010; Mikulić, Krešić, Prebežac, Miličević & Šerić, 2016; Murphy *et al.,* 2000; Ritchie & Zins, 1978; Var, Beck & Loftus, 1977; Vengesayi, 2003). This is despite the fact that destination attractiveness is an antecedent of destination competitiveness (Vengesayi, 2005). Just like the competitiveness aspect, attractiveness as a research area in the African tourism context has been limited. Only one paper on attractiveness was written in the context of South Africa (Ferrario, 1979), hence there are no frameworks available for Zimbabwe to use in assessing its attractiveness as a tourism destination. There are no studies that have been done in the context of Zimbabwe as a tourism destination.

The strategic importance of branding in a tourism destination context is recognised (So, King, Hudson & Meng, 2017:640). However, empirical studies that address the link between destination branding and competitiveness are scanty (Miličević *et al.,* 2017:209). Moreover, there is a missing link between destination branding and attractiveness in the wider tourism literature (So *et al.,* 2017:640). According to Kladou *et al.* (2015), only three papers have addressed the assessment of destination brand performance using both supply and demand perspectives. Previous research on destination branding has been predominantly done using a demand side approach (Kladou *et al.,* 2015). Integrated approaches from both sides are seldom used in the assessment of destination competitiveness and attractiveness. Additionally, there are no standardised measuring instruments for both concepts. Therefore, it is clear that there is both a literature and methodological gap with regard to destination competitiveness and attractiveness research. In the context of Zimbabwe as a tourism destination, there is a deficiency of literature that addresses the assessment of competitiveness and attractiveness. Vengesayi (2005) is the only study that assessed the comptetitiveness of Zimbabwe as a tourism destination, though not in a destination branding context. Factors influencing the competitiveness of tourism destinations are always changing (Du Plessis *et al.,* 2015). This could also be true in the context of the factors influencing the attractiveness of a tourism destination. Therefore, the current influences of competitiveness and attractiveness of brand Zimbabwe as a tourism destination are not known.

This study critically assesses factors that influence destination competitiveness and attractiveness of brand Zimbabwe as a tourism destination. Due to literature and methodological gaps, this current study is crucial. The lack of systematic and continuous research on the implications of destination branding on Zimbabwe is a challenge. Through this study, contributions will be made to existing literature on destination branding, destination competitiveness and destination attractiveness. In light of this, the study could help brand Zimbabwe improve its perception management problems and enhance its competitiveness and attractiveness as a tourism destination.

The study's framework can assist brand Zimbabwe as a tourism destination to understand the critical competitiveness and attractiveness factors. These

competitiveness and attractiveness factors will guide Zimbabwe with the design and formulation of effective destination marketing and branding messages. The framework is also going to be used in destination planning and will thus contribute towards tourism planning literature in Zimbabwe, as there has been a notable lack of literature on this area (Mkono, 2012:207). The factors influencing competitiveness and attractiveness could also be managed by Zimbabwean tourism as a tool for increasing destination brand loyalty, tourism income and employment opportunities.

The questions that remains for this study are: What are the factors influencing the competitiveness and attractiveness of brand Zimbabwe as a tourism destination? What are the significant contributors of destination brand loyalty and prosperity and investment competitiveness?

1.4   GOAL OF THE STUDY

The study's main goal and objectives are outlined below.

1.4.1 Goal

To develop a competitiveness and attractiveness assessment framework for brand Zimbabwe as a tourism destination.

1.4.2 Objectives of the study

The objectives of this study are:

Objective 1

To evaluate destination branding as a strategy for building competitive and attractive destination brands by:

- means of a comprehensive review of literature that seeks to identify the significance of branding in creating competitive and attractive destinations;
- providing pertinent hypothetical research fundamentals and definitions of branding and destination branding;
- clarifying the contextual frameworks in which they are applied;
- elucidating the genesis of destination branding within the tourism context in Zimbabwe;

- contextualising destination brand performance for Zimbabwe.

Objective 2

To analyse and examine destination competitiveness and attractiveness from a destination perspective by:

- means of a comprehensive review of literature that seeks to identify key measurement variables of competitiveness and attractiveness in a tourism context;
- providing pertinent research fundamentals and definitions of competitiveness and attractiveness;
- clarifying the contextual frameworks in which the aspects of competitiveness and attractiveness have been applied in a tourism destination context.

Objective 3

To assess the competitiveness and attractiveness of brand Zimbabwe as a tourism destination by:

- identifying the key tourist motivations in the empirical context of Zimbabwe;
- empirically testing the correlations between destination branding and destination competitiveness and attractiveness factors in the context of brand Zimbabwe;
- identifying the significant factors that influence destination competitiveness in the empirical context of Zimbabwe;
- identifying the significant factors that influence destination attractiveness in the empirical context of Zimbabwe;
- identifying and analysing the significant contributors to Zimbabwe's brand loyalty;
- identifying and analysing the significant contributors to Zimbabwe's economic competitiveness.

Objective 4

To make deductions from the study's findings and contribute recommendations concerning destination competitiveness and attractiveness and the application of the proposed framework within the context of Zimbabwean tourism as a way of providing

policy makers with accurate destination brand competitiveness and attractiveness factors.

1.5   METHOD OF RESEARCH

The method of research discussed in this section comprises a literature review and the empirical survey.

1.5.1   Literature study

The study reviewed internationally refereed journals, books, handbooks and other sources that were available on the North-West University Library databases including Business Source Premier, Elsevier, Emerald, Heal-Link, JSTOR, Sage, Google Scholar and Google. Development of theoretical background regarding the key constructs of the study was better traced by means of a comprehensive review of literature. The key constructs of the study were destination branding, destination competitiveness and destination attractiveness. Due to the complexity of the area of study, the review of literature was done in two chapters.

The first literature review chapter (Chapter 2) probed the theoretical foundations and definitions of destination branding. The significance of destination branding and frameworks were also discussed and critiqued in this chapter. Chapter 3 focused on the review of literature on the relevant theoretical foundations of competitiveness and attractiveness in a tourism destination context. The chapter also discussed the limitations of the existing models and the lack of standardised measuring items of competitiveness and attractiveness.

Key words that were used in the literature search included: *destination; destination branding; destination competitiveness; destination attractiveness; effects of branding; country branding; national branding limitations of competitiveness models* and *Zimbabwe.*

1.5.2 Empirical research survey

Chapter 4 deliberates in detail the method of research that was employed in the study. The purpose of this section is to present a synopsis of how the empirical survey was administered.

1.5.2.1. Research design

Descriptive, exploratory and causal research designs were employed as a means by which the study's objectives were achieved (Babbie & Mouton, 2003:79). Descriptive design was employed in this study to describe the data that was obtained in both the demand and supply surveys (Babbie & Mouton, 2003:80; Sahu, 2013:27; Tustin, Ligthelm, Martins & Van Wyk, 2005:86). The demand data that was described by means of descriptive research was the tourists' demographic profile, travel behaviour and travel motivations. Descriptive research for supply focused on the organisational profile with particular emphasis on the categories of establishments, number of employees, nature of operations and so on.

The identification of factors that influences the competitiveness and attractiveness of brand Zimbabwe as a tourism destination made the study to be exploratory in nature. This information was used to gain insight into competitiveness and attractiveness factors in the context of Zimbabwean tourism. These insights were also used to identify attractiveness factors that are significant in contributing towards Zimbabwe's destination brand loyalty as well as competitiveness factors that are significant in predicting prosperity and investment competitiveness. Causal research was also employed in this study to determine if one or more variables caused or affected one or more other variables (Hair *et al.,* 2010: 36; Malhotra, 2010:113; McDaniel & Gates, 2013:67; Zikmund & Babin, 2013:51).

Quantitative methodological approach was employed in this study because it is an objective design that can be replicated in future. Additionally, a quantitative methodological approach was deemed more appropriate because this type of methodology is capable of obtaining concrete, numerical and measurable information that can be statistically analysed. The study followed a positivist approach, a philosophy that is principally grounded in quantitative methodologies (Tuli, 2010:100).

Statistical analysis for the study was done using Statistical Package for Social Sciences version 24.0 and the results were presented in tables and graphs.

1.5.2.2 Development of survey instruments

This study was done using both demand and supply side perspectives. Therefore, two sets of survey instruments were used to collect data.

1.5.2.2.1 Demand side survey instrument

Data on destination attractiveness of brand Zimbabwe was gathered through the use of a questionnaire. The questionnaire was administered to international tourists who visited Zimbabwe between 21 November 2016 and 17 January 2017. The survey instrument for demand was developed in two stages: that is phase 1 (pilot test) and phase 2 (empirical survey). The measuring instrument was developed based on literature, previous studies and other elements that were added by the researcher (Pike & Page, 2014; Barros & Machado, 2010; Martinez-Garcia & Raya, 2008; Gokovali, Bahar & Kozak, 2006; Dwyer & Kim, 2003; Pearce, 1979; Buhalis, 2000; Prayag, 2010; Poon, 1993; Hassan, 2000; Mihalic, 2000, 2013; Ashworth & Page, 2011; Assaf & Josiasen, 2012; Assaf & Tsionas, 2015). A more comprehensive list of the sources for the demand survey is provided for in Table 4.2.

The demand survey instrument was pretested among tourism academics and industry experts during phase 1 of the survey. The academics used in pretesting the demand survey instruments were mainly those whose work have been reviewed as part of the study in chapter 2 and 3. These academics were drawn from Africa, Europe and the United States. Industry experts were drawn from Zimbabwe and Ghana. The pilot study was done between 31 May 2016 and 31 July 2016.

Measuring items of destination attractiveness were identified based on the review of literature. The items were condensed by evaluating their importance in phase 1 of the survey. Measuring items that were retained after phase 1 of the survey were used in the second phase of the demand survey. Adjustments were done to the demand survey instrument as per the guidelines of recommendations that were made during the pre-test.

The demand survey had 3 major sections. The first section dealt with the demographic aspects of the respondents such as gender, age, country of residence, level of education, income and marital status. The second section of the demand survey measuring instrument covered aspects relating to the travel behaviour of the respondents such as frequency of visits, travel group size, length of stay, spending etc. The last section of the demand survey instrument focussed on the assessment of destination attractiveness factors. These factors were evaluated using a 5-point Likert scale whose options were: 1 = *strongly disagree*; 2 = *disagree*; 3 = *not sure*; 4 = *agree*; and 5 = *strongly agree*. Aspects that were covered in the last section include destination attractions, destination amenities, destination accessibility, destination ambience, destination environment, price attractiveness, destination brand, destination brand identity, destination brand image and destination brand loyalty (c.f. Table 4.2).

1.5.2.2.2 Supply side survey instrument

The supply survey data was also collected using a questionnaire as measuring instrument. The instrument was subjected to two distinct phases, as was explained above under the demand survey. Measuring items that were used during the supply survey were based on literature, previous studies (Ritchie & Crouch, 2003; Kim, 2012; Buhalis, 2000; Prayag, 2010; Poon, 1993; Hassan, 2000; Mihalic, 2000, 2013; Ashworth & Page, 2011; Assaf & Josiasen, 2012; Assaf & Tsionas, 2015; Crouch, Schultz & Valerio, 1992; Kulendran & Dwyer, 2009; Barros & Dieke, 2008; Mangion, Durbarry & Sinclair, 2005) and new elements that were added by the researcher. A more comprehensive list of the sources and items used for the supply survey is presented in Table 4.3.

The measuring instrument for supply had 2 sections. The first section covered aspects relating to organisational profile such as tourism and hospitality categories, years of operation, number of employees (both permanent and temporary), period when busy, percentage of repeat visitors, unique selling propositions of both Zimbabwe and the establishment, and the marketing mediums used by establishments. The second section collected data regarding the assessment of destination competitiveness factors in the context of Zimbabwe. The same Likert scale for demand was used for

the supply measuring instrument. The aspects that were covered in the second section include what makes Zimbabwe competitive, level of tourist satisfaction, returns on destination branding investment, destination quality, quality of human resources, destination attractiveness, destination management practices, effectiveness of destination brand management strategy, tourism infrastructure, price competitiveness, prosperity and investment competitiveness, and politics and policies (c.f. Table 4.3).

1.5.3 Population and sample size

This section presents an overview of the population and sampling sizes that were used in this study.

1.5.3.1 Demand population and sample size

The population for the demand survey consisted of international tourists who visited Zimbabwe's popular tourist attractions of Victoria Falls, Harare, Great Zimbabwe and the Eastern Highlands between 21 November 2016 and 17 January 2017. These tourism destination are popular in terms of the number of visitors they attract per annum (Zimbabwe Statistics Agency [ZIMSTAT], 2016). In addition, the four destinations were also chosen for the survey because they form the primary reference of *Zimbabwe: A World of Wonders.*

The demand survey employed both probability and non-probability sampling techniques. In terms of probability sampling, stratified sampling was employed in dividing the population into sub-groups. The tourism destinations were firstly divided into four popular tourism destinations in Zimbabwe. Secondly, visitors to these destinations were divided into local/national and international tourists. Local/national tourists were excluded in the demand survey while international tourists were included. The researcher and research assistants first asked the tourists if they were local or international before the survey instruments were administered for completion.

After stratified sampling, the demand survey also employed non-probability sampling. Convenience sampling technique was used for the demand survey. This technique was based on the willingness of the tourists to participate in the survey. The survey started on the same day in all four locations. Questionnaires were administered by the

researcher in Great Zimbabwe and in Victoria Falls while research assistants administered the questionnaire in Harare and the Eastern Highlands. The research assistants who participated in this study were adequately prepared during a face-to-face meeting that was conducted by the researcher in Harare. The aim of the preparation meeting was to ensure that the research assistants understood the objectives of the study. The demand instrument and its aims were also explained during that meeting.

Zimbabwe received 2.1 million tourists in 2015 (ZIMSTAT, 2016) and the four tourism destinations that formed the basis of this study approximately received a million visitors in 2015. Therefore, in order to determine that a representative number of survey questionnaires were distributed, the study followed the guidelines developed by Krejcie and Morgan (1970:608). According to these guidelines, for a population that has (N) = 1 million, 384 respondents are recommended. Based on this formula, the researcher determined that, 500 questionnaires should be administered. Out of the 500 questionnaires, a total of 468 were completed and returned to the researcher. However, during data cleaning and coding, it was discovered that 450 questionnaires were filled out completely and therefore had usable responses. Therefore, the number of questionnaires administered and those with usable responses were deemed representative of the population.

1.5.3.2 Supply population and sample size

The supply survey, just like the demand survey, also followed a stratified sampling procedure and convenience sampling. The tourism and hospitality establishments were first divided into groups by location just as the demand survey using stratified sampling. In addition, the establishments were further divided into groups by nature of operations/business. These groups included hotels, food and beverage establishments, attractions based organisations, transport, MICE related and tourism services. Managers and/or people recommended by the managers completed the supply survey instruments.

Convenience sampling was employed for operators that agreed to participate in this study due to their accessibility to the researcher and the field assistants. The Zimbabwe Tourism registration database of all tourism and hospitality organisations,

as of September 2016, had 1281 operators in different categories (ZTA, 2016). The sample size in respect of the supply side also followed the same guidelines as the demand survey. Krejcie and Morgan (1970:608) proposed that, for a defined population of (N) = 1300, the suggested sample size is 297. It was, therefore, determined that 320 questionnaires would be sufficient for the supply side. A total of 301 questionnaires were completed and captured for analysis.

1.5.4 Data Analysis

Demand and supply data were captured using Microsoft Excel 2016. After capturing and coding, both data for demand and supply were statistically analysed using Statistical Package for Social Sciences (SPSS version 24.0). Data analysis for this study was done in 3 major phases:

- **Descriptive analysis**

The study employed descriptive analysis for both demand and supply data. Descriptive analysis for demand focused on the demographic profile, travel behaviour and travel motivations. With regard to supply data, descriptive analysis was used to describe the organisation profile, particularly the type of establishments, years of operation, number of employees, unique selling points and marketing mediums used to market the organisation.

- **Exploratory factor analysis**

Destination competitiveness and attractiveness factors were determined using exploratory factor analysis (EFA). EFA was also performed in this study as a way of measuring the reliability of the competitiveness and attractiveness factors. 12 destination attractiveness factors were revealed. Exploratory analysis for supply data revealed 14 destination competitiveness factors.

- **Causal analysis**

The relationship between destination attractiveness factors as well as destination competitiveness factors was established using Spearman's rank order correlations. The relationships between these factors were determined and they ranged between large and small in effect. The same analysis was also done for supply, and the

relationship between destination competitiveness factors was determined using Spearman's rank order correlations. Additionally, relationships between destination attractiveness and destination competitiveness and other variables such as gender, age, organisational categories, continent of residency, frequency of visits were further established using independent *t*-tests and one way Analysis of Variances (ANOVAs) using Tukey's post-hoc test to determine the differences.

Further causality in this study was achieved by means of step-wise regression analysis. The focus of regression analysis was to find the significant destination attractiveness factors toward destination brand loyalty in the empirical context of Zimbabwe. Four destination attractiveness factors were found to be significant contributors of destination brand loyalty in the empirical context of Zimbabwe. These destination attractiveness factors include destination brand image ($p = 0.00$), destination ambience ($p = 0.00$), destination brand identity ($p = 0.00$) and destination environment ($p = 0.00$). With regard to supply, regression modelling was concerned with finding the significant contributors of prosperity of destination residents and investment competitiveness. Six destination competitiveness factors were found to be significant contributors of prosperity and investment competitiveness in the empirical context of Zimbabwe as a tourism destination. These destination competitiveness factors include price ($p = 0.00$); politics and policies ($p = 0.00$); cultural attractiveness ($p = 0.03$); brand strategy effectiveness ($p = 0.03$); destination branding outputs ($p = 0.00$) and satisfaction recommendations ($p = 0.00$).

1.6 DEFINITION OF KEY CONCEPTS

Concepts can be defined diversely depending on the premise and aims of the one defining them, with other concepts defined vaguely and variedly than first imagined. It is against this background that there have been numerous definitions to such concepts as brand, branding, destination, destination competitiveness, and destination attractiveness. It is essential and indispensable that these concepts be defined for the rationale of this proposed research study. These definitions are meant to spell out the milieu in which the terms are going to be used and applied in this proposed study.

1.6.1 Brand

Keller (2003:3) defines a brand as "name, term, symbol or design or a combination of these items intended to identify the goods and services of one seller or a group of sellers and to differentiate them from those of competition". Using Kapferer's (2008) definition of brands, a brand is defined as the physical attributes and defining qualities of a particular product, service or set of products or services, as well as the cognitive associations held in the mind of consumers. These attributes are perceived as elements that increase the value of goods, services or set of products or services.

1.6.2 Branding

Branding is the major tool that is widely used by marketers as they try to distinguish their products from those of competition (Keller, 2008:2; Lamb *et al.,* 2002:301). It is also considered to be central to marketing and the foundation of most business organisation. Branding in its general nature consists of the attributes associated with a brand in the customers' minds. Branding focuses differentiating products in a way that is attractive, meaningful and persuasive to the brand's target audience (Keller, 2008). However, despite the complexity that surrounds the whole branding process, the goal of branding is to create and develop a specific identity for a company, person, product or destination so as to position the brand in customers' minds. It therefore seeks to distinguish one's product from that of competition.

1.6.3 Destination

The Webster Dictionary defines the term destination as "the place set for the end of a journey" that is a geographical area (location, a resort, a region, a country, etc.) where the traveller intends to spend time away from home. In a tourism context, many definitions have been provided to explain what constitutes a destination. A tourism destination is a place that offers tourists an amalgam of tourism products and services (Buhalis, 2000). These products and services are, therefore, consumed under the destination's brand name. Apart from the destination being geographic, tourists view a tourism destination based on its attractions, accessibility, activities, and ancillary services (Buhalis, 2000). Pike (2004) argues that a destination is a place that has potential to attract tourists for rather a short stay. Tourism destinations can either be continents, countries, cities, states, provinces and villages as well as purpose built areas (Pike, 2004). UNWTO (2007) defines a tourism destination as a place that is

considered important because of its ability to lure visitors. Therefore, it is clear that a tourism destination goes beyond being merely a geographic place (Leiper, 1995) as it consists of a mixture of products, services, artificial elements, natural resources and information.

1.6.4 Destination competitiveness

Competitiveness in a tourism destination context refers to capacity to defend market position, market share and develop upon these elements over time (d'Hauteserre, 2000). The same concept has also been defined as the destination's capability to produce and assimilate value added-products that sustain the destination's resources and help the destination to defend its market position from competition (Hassan, 2000). Destination competitiveness also refers to the ability of the destination to sustainably attract a growing number of tourists while being able to meet their needs through the provision of memorable tourist experiences at a profit (Ritchie & Crouch, 2003). Hence, by stressing these definitions, a destination must be able to preserve its marketplace position and share over a period of time.

1.6.5 Destination Attractiveness

Destination attractiveness is "the feelings, beliefs, and opinions that an individual has about the destination's perceived ability to provide satisfaction in relation to his or her special vacation needs" (Hu & Ritchie, 1993:25). It also refers to "something recognised by individuals as a factor that influences their decision making of pleasure travel (Lue, Crompton & Stewart, 1996:43). Mayo and Jarvis (1981) note that destination attractiveness refers to an amalgamation of personal benefits that are formed on individual perceptions with regard to the ability of the destination to meet their expectations by delivering the individual benefits that are being sought. Therefore, the concept of destination attractiveness relates to how travellers make decisions with regard to the specific benefits they have derived from visiting a specific destination. Destination attractiveness is operationally defined in this study as a tourist's feelings, beliefs, attitudes, opinions, or perceptions of specific destination attributes or factors that influence a tourist's decision of which specific destination should be selected. Therefore, the overall destination attractiveness is always the

function of the affective evaluations of the destination and the perceptions of attribute importance.

1.7 STRUCTURE OF THE THESIS

This research study consists of seven (7) chapters. The organisation and outline of this study is as follows:

Chapter 1: Introduction and Problem Statement

This chapter provides an overview of how the research study is arranged. It consists of an introduction to the study, background to the study and the study's research problem. This chapter also discusses the method of research, objectives of the study as well as the definition of key study concepts. The aim of this chapter is to create an understanding of destination competitiveness and attractiveness in the context of branded destinations.

Chapter 2: Destination Branding: A Review of Related Literature

Chapter two examines the obtainable literature on destination branding and how the research fits into the gaps. This chapter provides a theoretical basis of destination branding in terms of relevant definitions and contextualisation of the concept as it pertains to Zimbabwe as a tourism destination. Aspects contributing to destination branding are also examined and discussed in this chapter. The significance of destination branding is also discussed. The objective of this chapter is to provide a clearly defined premise for assessing destination branding efforts in the context of brand Zimbabwe's competitiveness and attractiveness as a tourism destination.

Chapter 3: Destination Competitiveness Attractiveness

This chapter discusses the definitions and existing theories relating to the measurement of destination competitiveness and attractiveness. This is done by means of focusing on the origins, applications, challenges, methodological aspects, and framework classifications of competitiveness and attractiveness. The chapter also provides a contextual analysis for assessing destination competitiveness and attractiveness for Zimbabwe as a destination by evaluating existing frameworks. The purpose of this chapter is to discuss destination competitiveness and attractiveness measurement and how it applies to this study.

Chapter 4: Research Methodology

Chapter 4 outlines the research methodologies and describes the study area and parameters. It is in this chapter where the research strategy is outlined. It covers the population, sampling techniques, instrument design, data collection process, research approaches and the overall methodology employed in this study. This chapter includes an elaborate discussion on the development of the survey instruments by referring to the aspects impacting destination competitiveness and attractiveness as identified in literature. In addition, the statistical analysis used in this study is also explained in this chapter.

Chapter 5: Empirical Results of Demand

The fifth chapter presents the analysis of data collected from a demand side survey. The purpose of this chapter is to discuss, analyse and interpret the empirical results of the demand survey data. Firstly, an in-depth descriptive analysis of data is discussed in this chapter. Secondly, the factor analysis of factors contributing to brand Zimbabwe's attractiveness as a tourism destination are presented, discussed and interpreted. Thirdly, aspects influencing Zimbabwe's attractiveness are explained using independent *t*-tests and ANOVAs. The relationship between destination attractiveness factors is explained by means of correlations. Lastly, multiple regression analyses are used in this chapter to develop models and explain the significant destination attractiveness contributors towards destination brand loyalty in the empirical context of Zimbabwe as a tourism destination.

Chapter 6: Empirical Results of Supply

The sixth chapter presents the analysis of data collected from the supply side survey. The purpose of this chapter is to discuss, analyse and interpret the empirical results of the supply survey data. The first section of the chapter presents an in-depth discussion of descriptive results. The in-depth analysis of descriptive results of supply is followed by the factor analyses of the items that contribute towards brand Zimbabwe's competitiveness as a tourism destination. Statistical techniques that explain the relationship among variables are explained in the third section of the chapter by means of ANOVAs and correlations. The final section of this chapter discusses and interprets the results of regression modelling with regard to the

significant destination competitiveness factors on economic competitiveness in the empirical context of Zimbabwe as a tourism destination.

Chapter 7: Conclusions and Recommendations

The purpose of this chapter is to outline the key conclusions of the study. Theoretical, methodological and practical contributions of the study are presented in this chapter. The chapter also discusses the recommendations and suggestions that should direct the agenda of future research on destination competitiveness and attractiveness. Recommendations in this study are made to assist destination managers in Zimbabwe on how to maximize their branding and marketing efforts in a way that builds and sustains a competitive and attractive destination brand. Limitations of the study are also identified in this chapter.

CHAPTER 2

DESTINATION BRANDING-A REVIEW OF LITERATURE

Knowledge does not exist in a vacuum, and your work only has value in relation to other people's. Your work and your findings will be significant only to the extent that they are the same as, or different from, other people's work and findings."

Jankowicz (2000)

2.1 INTRODUCTION

Branding is an indispensable and crucial marketing strategy tool that organisations can use to build strong brand perceptions (Kemp, Childers & Williams, 2012:508). Rooney (1995:48) notes that organisations are able to create a centre of attention, market share, approval of value, image, prestige, or lifestyle through strategic branding efforts. In as much as goods and services are branded, tourism destinations through their respective Destination Management Organisations (DMO) are also promoting destination brands through branding strategies.

The operating business environment has progressively become turbulent and competitive (Assaker, Hallak, Vinzi & O'Connor, 2013; Balakrishnan, 2009:611; Camison & Fores, 2015; Du Plessis *et al.,* 2015; Kim & Lehto, 2013), with rapid changes in technological developments (Buhalis & Law, 2008), consumer preferences and market conditions (Buhalis, 2000). As a result of competition among tourism destinations, branding has long been conventionally accepted as a strategy for building destination competitive advantage (Tasci & Denizci, 2009). Consequently, DMOs globally are faced with challenges of distinguishing their destinations from competing destinations that offer the same or better tourism products. Since 1990, branding initiatives from DMOs have been on the increase (Pike & Page, 2014:211).

Destination branding is the aptitude of destination marketers to guarantee that a positive destination image and memorable experiences will linger in the minds of tourists. Amujo and Otubanjo (2012:90) identify this as an imperative constituent of destination brand management. The objective of destination branding has been the

need to stimulate brand loyalty among tourists within a tourist destination (Pike & Page, 2014). Positive destination brand image and awareness has the propensity to reduce the strenuous need for a comprehensive information search of tourist destinations and guide tourists towards destination choice (Balakrishnan, 2009; Amujo & Otubanjo, 2012; De Nisco, Marino & Napolitano, 2015; Stylos, Bellou, Andronikidis, & Vassiliadis, 2017). A positive destination brand image is a significant precursor to tourist satisfaction and defines the post-visit behaviour and repeat business (De Nisco *et al.,* 2015:306; Kozak, 2001; Lee, Yoon & Lee, 2007). Chen and Tsai (2007) affirm that tourists generally use perceived destination brand image as a parameter in forming destination expectations before they plan to visit. In addition, tourists use the perceived destination brand image in comparing the results of their travel experience (Chen & Tsai, 2007).

Creating a unique destination identity aimed at developing an attractive and competitive destination brand position is imperative for effective brand differentiation (Amujo & Otubanjo, 2012:90; Campelo, Aitken, Thyme & Gnoth, 2014:155; Pike & Page, 2014:211) in a business environment that is competitive (Assaker, Hallak, Vinzi & O'Connor, 2013; Ayikoru, 2015; Camison & Fores, 2015; Du Plessis *et al.,* 2015; Kemp *et al.,* 2012; Kim & Lehto, 2013; Tasci & Denizci, 2009). The failure to create a unique destination brand runs the risk of marketing a tourist destination that is not easily remembered (Amujo & Otubanjo, 2012; Morgan *et al.,* 2002). It also results in having a brand that is not clearly differentiated from competing tourist destination brands (Amujo & Otubanjo, 2012). Therefore, it is important to note that having a unique brand identify is of utmost importance to Zimbabwe is it is to compete with its regional peers such as South Africa, Namibia and Botwsana.

The purpose of this chapter is to present a critical review of interrelated literature on destination branding and how the appraisal assisted the researcher to engender and refine the research thoughts. This chapter aids as a theoretic platform to which destination competitiveness and attractiveness is examined. This will be achieved initially by defining and discussing the concepts of brand and destination brands. The discussion will also include the significance of destination branding. Secondly, this chapter also discusses destination branding concepts of identity and image. Thirdly, models of destination branding and approaches to destination branding are also

discussed in this chapter. A review of theoretical and conceptual frameworks in this study is premised on the general branding theory. The study acknowledges and incorporates research arguments into a very reliable synthesis that shows the effects of destination branding on destination attractiveness and competitveness. The synthesis was followed by a discussion on destination branding in the context of Zimbabwe.

In this chapter, the researcher exhibited consciousness of the contemporary knowledge in the study, its precincts, and how the current research fits in the broader context. This chapter also defines what is understood by practitioners and scholars concerning the effectiveness of destination branding strategies in relation to competitiveness and attractiveness of a tourism destination. This discussion, therefore, is hinged on bringing why tourist destinations pursue various destination branding strategies and their inherent effects in relation to the competitiveness and attractiveness of Zimbabwe as a destination brand. This chapter also draws upon several researchers' theories that are relevant to the research question. The notions of several researchers are built upon within this study and used in concurrence with the method of research that meets the requirements of this study, goal and objectives. Each aspect of destination branding is critically assessed and phrased in such a way that it applies to the Zimbabwean context. Figure 2.1 presents a schematic presentation of how this chapter and its components are contextualised.
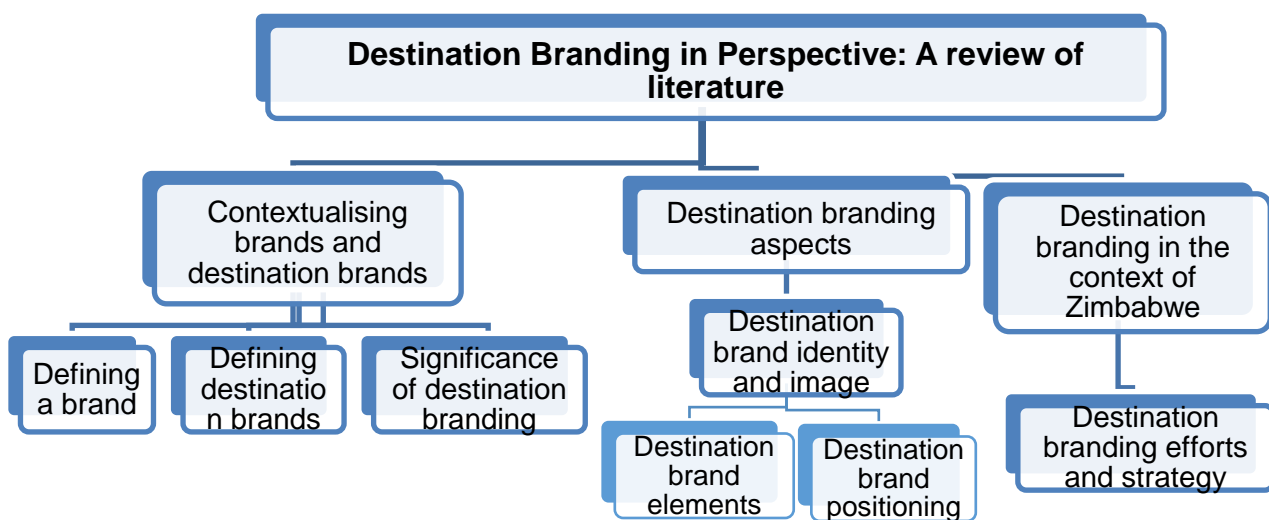
Figure 2.1: Schematic structure of Destination Branding in Perspective
Source: Developed by author

2.2 CONTEXTUALISING BRANDS AND DESTINATION BRANDS

Interest by academics in brand management saw an increase in the past two decades (Kaplan, Yurt, Guneri & Kurtulus, 2010). As a result, branding is now being used in companies as a strategic tool that enhances their competitiveness (Krishnan, 2010). Branding has the ability to generate worth for both consumers and manufacturers (Keller, 2003). The significance of brands in shaping competitiveness and creating worth has contributed to the growth of scholarly efforts in the domain. The purpose of this growing stream of research on branding is to enhance the comprehension of a number of concepts and elements such as brand image, brand equity and brand identity (Aaker, 1991, 1996; Kapferer, 1992, 2008). As a result of research, more light has been shed with regard to the operationalisation of brands and their strategic importance (Kaplan *et al.,* 2010).

Today's marketplace is tumultuous and competitive. Consequently, branding by differentiation is acknowledged as a strategy for competitive tourist destinations (; Campelo *et al.,* 2014:155; Tasci & Denizci, 2009). Branding is an indispensable marketing strategy tool. Therefore, construction of strong brand perceptions is of supreme importance for successful firms (Kemp *et al.,* 2012:508). Conversely, the word 'branding', even in the wider marketing sciences, is fairly intricate. As a result, an assortment of hypothetical perspectives has been advanced. However, a broad discourse of branding theories is beyond the reach of this current study. The intention of this section is to momentarily delineate a set of concepts with regard to the way brands and destination branding will be applied throughout this thesis and form part of the study's agenda. The term brand will be discussed below as a way to arrive at a suitable definition of destination branding for the purposes of this study.

2.2.1 Defining a brand

Aaker (1991) defines a brand as "a distinguishing name and/or symbol (such as a logo, trademark, or package design) intended to identify the goods or services of either one seller or a group of sellers and to differentiate those of competitors". Aaker's definition is considered to be the leading definition within the branding literature and provides considerable understanding with regard to branding practice. It exhibits and explains the primary role of a brand. Keller (2003:3) defines a brand as "a name, term,

symbol or design or a combination of these items intended to identify the goods and services of one seller or a group of sellers and to differentiate them from those of competition". American Marketing Association (2006) describes a brand as "a name, term, symbol or design or a combination of these items intended to identify the goods and services of one seller or a group of sellers and to differentiate them from those of competition". The American Marketing Association (2006) definition has been frequently cited within the marketing and brand management literature (Fan, 2006, 2010; Hankinson, 2004; 2007; 2012; Kerr, 2006). It must be noted that both definitions of Keller (2003) and the American Marketing Association (2006) agree that a brand serves as an identifier and differentiator between products offered by one organisation when compared with competition.

The Oxford Dictionary (1990) defines a 'brand' as: "Brand (noun): a particular make of good, and identifying trademark or label. An identified mark burned on livestock or former prisoners with a hot iron, a piece of burning smouldering, or charred wood." Although brands do not have physical existence, they are valuable assets whose value is difficult to determine unless it is subjected to a specific business transaction such as a sale. It is clear that many have attempted to define the term brand as an intangible asset that represent the organisation's identity. The use of names, terms, symbols, logos, designs and/or a combination of these elements is intended to identify products and services. As a result of using these elements, organisations will be able to create distinctive images and positive asssociations that are intended at creating various benefits to the owner (Farquhar, 1998; Keller, 2008:2; Laforet, 2010:24).

A brand is generally believed to be composed of three main components that is the identifier, attributes and association component (Sexton, 2008). Therefore, the purpose of brand elements such as logo, shape, and colour is to help customers to identify the brand. The brand's identifier component is critical in that it often leads customers to think of the organisation and its products. Brand attributes component of the brand is concerned with what customers thinks of when responding to the brand identifier component. The benefits of the brand could be functional, emotional, and economic. The last component of the brand deals with the relationship between identifies and the brand's attributes.

A brand can be defined using two major approaches (Styles & Ambler, 1995). The first approach is to view a brand as an extension of the product. Through this approach to brand definition, it is clear that a brand is, therefore, an identifier (Keller, 2008). The second approach to defining a brand is the holistic view, which mainly focuses on the brand itself. Using the holistic approach ensures that all the elements of the marketing mix are linked to the brand (Styles & Ambler, 1995). Therefore, using the holistic approach, a brand is defined as a product with extra dimensions that have the potential to satisfy the expectations of the customer. Keller (2008) maintains that, "creating successful brands entails blending various elements together in a unique way – the product or service has to be of high quality and appropriate to consumer needs, the brand name must be appealing and in tune with the consumers' perceptions of the product, the packaging, promotion, pricing and all other elements must similarly meet the tests of appropriateness, appeal and differentiation". Calkins, Tybout and Kotler (2005) argue that, "the new competition is not between what companies produce in their factories, but between what they add to their factory output in the form of packaging, services, advertising, customer advice, financing, delivery arrangements, warehousing, and other things that people value".

Brands by their nature have benefits that are both functional and emotional which often extend their uniqueness and welcomed promise (De Chernatony & McDonald, 2003; De Chernatony & Riley, 1998). Therefore, brands functions as objects that facilitates processing of information such as simplifying choice and reducing risk with regard to product or service choice (Laforet, 2010:24). These brand functions are crucial in inducing trust among customers by means of satisfying their emotional and expressive needs through a range of various attributes of the brand (Keller, 2008; Laforet, 2010). A brand must promise distinguished benefits that are pertinant and persuasive to the consumer (VanAuken, 2002:15). The benefits and promises of a brand are aimed at positioning the brand successfully in the competitive market place. As a result, brands enables customers to choose and recognise products and services, in a cluttered marketplaceA brand, is therefore, an inclusive assurance that an organisation usually projects to its target market.

According to Keller and Lehman (2006), it is clear that brands are crucial in determining the effectiveness of marketing efforts. Salinas (2009) argues that brands

goes beyond simply being a trademark because in some instances, aspects of intellectual property rights, the culture of the organisation and its people also provides a basis for value creation and differentiation. According to Haigh and Knowles (2004), a brand therefore represents a specific value proposition and can therefore be used in the building stronger customer relationships.

Table 2.1 below exhibits the summary of definitions of a brand that were reviewed in this study.

Table 2.1: Summarised review of definitions of a brand

Author(s)	Focus	Purpose(s)
Aaker (1991)	Name, logo, trademark and package design	Identification; differentiation
Styles and Ambler (1995)	Product extension	Identifier
Keller (2003, 2008)	Name, term, symbol, design or a combination	Identification; differentiation
Haigh and Knowles (2004)	Value proposition	Building stronger customer relationships
American Marketing Association (2006)	Name, term, symbol, logo design or combination	Identification; differentiation
Sexton (2008)	Logo, shape and colour	Identifier, attributes and creation of brand associations
Salinas (2009)	Trademarks, people, culture and property rights	Value creation; differentiation
Laforet (2010)	Name, term, symbol, logo design or combination	Creation of distinctive images and positive association; choice simplification

Source: Developed by author

According to Tabe 2.1, the majority of researchers agree that the purpose of a brand is to identify and differentiate one's products and services from those of competition. The concept of branding has a long history and a commercial value. Regardless of how one uses the term; a brand has both active and passive forms (Clifton & Simmons,

2003:13). In its inert form, a brand is all about the impressions that are formed in the minds of the consumers, while in its active form; a brand is developed by means of forming such an impression (Clifton & Simmons, 2003:13). As a result, the conceptualisation of the term branding did not lead to a universal definition, hence its complexity (Gabbott & Jevons, 2009). The growing amount of research into branding did not translate to a better understanding of the term. Therefore, theory development with regard to branding is a continuous process. However, this study consequently applies the notion of a brand as more than just a trademark, hence "branded destinations" are therefore significant to this current study.

2.2.2 Defining destination brand

Tourism destinations across the globe are facing competitive pressures (Assaker *et al.,* 2013:26; Du Plessis *et al.,* 2015:1; Kim & Lehto, 2013:117; Pike & Page, 2014:221). Consequently, tourism destinations have responded through efforts such as destination marketing, national branding and the establishment of destination marketing organisations (Balakrishnan, 2009; Blain *et al.,* 2005; Buhalis, 2000; Mazanec *et al.,* 2007; Ritchie & Crouch, 1993; Tasci & Denizci, 2009; Zhang & Jensen, 2007). Literature displays no agreement among scholars and practitioners with regard to what an all-inclusive definition of a destination brand should be. Universal dimensions of what should encompass a tourism destination are yet to emerge. As a result, numerous definitions have been proposed.

The Oxford Dictionary (1990) defines the term destination as "the place set for the end of a journey" that is a geographical area (location, a resort, a region, a country, etc.) where the traveller intends to spend time away from home. In a tourism context, many definitions have been provided to explain what constitutes a destination. A tourism destination is a place that offers tourists an amalgam of tourism products and services (Buhalis, 2000). These products and services are, therefore, consumed under the destination's brand name. Apart from the destination being geographic, tourists view a tourism destination based on its attractions, accessibility, activities, and ancillary services (Buhalis, 2000). Pike (2004) argues that a destination is a place that has potential to attract tourists for rather a short stay. Tourism destinations can either be continents, countries, cities, states, provinces and villages as well as purpose built

areas (Pike, 2004). UWTO (2007) defines a tourism destination as a place that is considered important because of its ability to lure visitors.

Campelo *et al.* (2014:154) defines a destination as "both a geographic place and a metaphysical space determined by a network of meanings and values that are attached to it". Vanhove (2012:21) argues that a destination refers to "a specific geographic area under one or more government authorities that draws visitors from a substantial distance away by its attractions and provides paid accommodation facilities". Therefore, it is clear that researchers have differently defined a destination. Hence, a commonly acknowledged description of a tourism destination is yet to emerge. Therefore, it is clear that, a tourism destination goes beyond being merely a geographic place (Leiper, 1995) to include a mixture of products, services, artificial elements, natural resources and information. These elements of the destination must be able to meet the needs and expectations of the prospective tourists. Therefore, the concept of the destination is applied in this study in the wider sense of the term.

The concept of branding has its roots from fast moving consumer goods. It is a practice that adds value to the product (Kapferer, 2008; Laforet, 2010). While branding is not a novel concept in the general business and marketing sciences literature, research on destination branding is comparatively a contemporary addition to tourism research (Jansen, 2008; Pike, 2002; Schaar, 2013; Tasci & Kozak, 2006). Notwithstanding an increase in academic attention of destination branding, a comprehensively acknowledged explanation of what constitutes a destination brand is yet to emerge. According to Pike and Page (2014:211), research shows that there is a serious inconsistency in terms of defining what constitutes an all-inclusive definition of a destination brand.

There is a lot of controversy with regard to the concept of destination branding (Anholt, 2000, 2004; Olins, 2002) as a result, there are no clear guidelines that DMOs can employ in branding destinations (Pike, 2014: 209, 2005, 2009; Pike & Page, 2014; Volgger and Pechlaner, 2014). Many definitions and explanations have been given about what constitutes a tourism destination brand. Hence, the non-existence of a universal and collective definition of a destination brand among scholars and tourism

practitioners. This is so despite a long history of academic research (Hankinson, 2015:15).

Anholt (2004:4) argues that, "almost nobody agrees on what, exactly, branding means", likening the process to Wild West. As a result, branding in a tourism destination context is therefore confusing (Anholt, 2004:4, 2005b; Blain *et al.,* 2005; Hankinson, 2015:15; Kavaratzis & Hatch, 2013; Kladou *et al.,* 2015; Skinner, 2008; Vengesayi, 2003:644). This argument shows that there is a notable lack of consistency when it comes to the definition of destination branding (Blain *et al.,* 2005; Park & Petrick, 2006; Pike & Page, 2014; Tasci & Kozak, 2006). Research on destination branding has been inadequate in terms of its theoretical, exploratory and conceptual development (Hankinson, 2015:14; Kladou *et al.,* 2015; Pike, 2005; Qu *et al.,* 2011; Skinner, 2008). The understanding of what constitutes destination branding has remained blurred regardless of an increase in the amount of publications and research (Jevons, 2005).

Confusion surrounding the concept of destination branding does not augur well the narrative that tourism destinations constitute the world economy's biggest brand and future marketing is going to "be a battle of brands" (Marzano & Scott, 2009; Pike, 2005). The confusion is further exacerbated by the differences among academics in the area of destination branding. It is not yet clear whether the growing amount of research suggests the area is now well researched, as other scholars (Hankinson, 2015:14; Kladou *et al.,* 2015:190; Qu *et al.,* 2011; Schaar, 2013:1; Tsai *et al.,* 2009) believe that destination branding is in its infancy as an area of research.

Research to date has focused on comparing destination branding with consumer goods. The argument has been whether branding of destinations and that of goods require separate strategies. Kotler and Gertner (2002) argue that tourism destinations can also be branded. However, despite a growing contribution to literature from existing studies, much of the academic work remains largely theoretical (Hankinson, 2015:15). Nonetheless, it is decisively crucial to note that the contribution of this study comes from research that was done by others in the area of branding, whose efforts focussed on brand building and maintenance of strong brands though devoid of a

direct inference of the tourism sector products (Aaker, 1996; Doyle, 1990; Keller, 2008).

Destination branding is now extensively accepted in the tourism literature (Amujo & Otubanjo, 2012; Cai, 2002; Campelo *et al.,* 2014; Gomez, Lopez, & Molina, 2015; Konecnik & Gartner, 2007; Pike & Page, 2014; Pike *et al.,* 2010; Pike, 2002, 2004, 2005, 2009; Quintal, Phau & Polczynski, 2014). Research shows that there are two approaches in defining a destination brand. These approaches are borrowings done from the general marketing sciences (Gomez *et al.,* 2015:211). On the one hand, defining a destination brand can be approached from a company's perspective through the application of the American Marketing Association's definition to the tourism domain (see for instance Ritchie & Ritchie, 1998:103). On the other hand, other researchers have tried to define a destination brand using consumer perceptions that include the destination's brand image as a way of evaluating and analysing destination brands (see for instance, Amujo & Otubanjo, 2012; Chen & Tsai, 2007; De Nisco *et al.,* 2015; Prayag, 2010; Prebensen, 2007; Qu *et al.,* 2011).

Ritchie and Ritchie (1998:103) define a destination brand as "a name, symbol, logo, word mark or other graphic that both identifies and differentiates the destination; and conveys the promise of a memorable travel experience that is uniquely associated with the destination; consolidates and reinforces the recollection of pleasurable memories of the destination experience". This definition was built on the definition of branding by Aaker (1991), which includes identification and differentiation as key elements (Gomez *et al.,* 2015:211).

Tasci, Gartner and Cavusgil (2007) argue that, based on the outlook of international tourism, it means countries' names; symbols and their flags correspond to destination brands. The creation of a unique, differentiated destination brand is documented in literature as a survival tool used by DMOs to ensure their tourism destinations are able to survive within a globally competitive tourism marketplace (Qu *et al.,* 2011; Assaker *et al.,* 2013). Regrettably, Ritchie and Ritchie (1998) nevertheless seem to have failed to provide a convincing explanation of the processes that surround the usage of a destination brand, which is imperative in brand building and destination brand management.

Literature seems to suggest that definitions of a destination brand are built on brand functions as a unit or process. Destination branding is the process of developing brand logos, symbols and names that push a destination's competitive edge (Caldwell & Freire, 2004; Tasci *et al.,* 2007). Arguments have been made that destination management requires careful planning due to the fact that decisions are strategic and long term in nature (Benckerndorff & Pearce, 2003; Caldwell & Freire, 2004; Pike & Page, 2014). The nucleus of destination branding is considered to be the way that involves the construction of a strong positive destination brand image that is capable of identifying and differentiating the tourist destination brand through a brand mix selection (Cai, 2002; Campelo *et al.,* 2014; Gomez *et al.,* 2015Qu, Kim & Im, 2011).

A destination brand has a mix of brand elements that are proficient in identifying and differentiating a tourist destination through positive image building (Cai, 2002; Campelo *et al.,* 2014; Gomez *et al.,* 2015; Hankinson, 2004; Prebensen, 2007; Qu *et al.,* 2011). Therefore, it can be seen that destination branding is a process that carefully selects strategic combinations of dependable mixtures of the brand's elements. These elements must be capable of identifying and differentiating a tourism destination by means of a positive image (Campelo *et al.,* 2014; Gomez *et al.,* 2015; Tasci & Kozak, 2006). The relationship between destination brand associations and destination brand image remains unclear despite a growing amount of academic research (Qu *et al.,* 2011).

The concept of destination brand denotes a place that is attractive for the tourists to visit (Anholt, 2009). In this regard, destination branding converses a "sense of place" that has the ability to generate emotional connections with target markets. More specifically, a destination brand has also been equated to storytelling that aids visitors with insights into the destination's attributes (Anholt, 2009). Consequently, destination branding involves the bringing of a place to life by ensuring that it is relevant for the tourists (Anholt, 2010). According to Morgan and Pritchard (1998:140), the concept of destination brand, "represents a unique combination of product characteristics and added values, both functional and non-functional, which have taken on a relevant meaning, which is inextricably linked to that brand, awareness of which might be conscious or intuitive". Destination branding also engrosses a mixture of services produced and made available by local tourism residents (Beritelli, 2011). Therefore, in

a tourism context, a destination brand must have the capability of bringing communities, products and tourism attractions together (Cai, 2002; ; Campelo *et al.,* 2014; Daniels, 2007; Marzano & Scott, 2009) by means of communicating the intangible and tangible touristic experiences to ultimate consumers. This, however, must be done using a correct combination of brand elements that are capable of influencing destination brand choice.

Morrison and Anderson (2002) pronounce destination branding as the means by which a tourism destination communicates its distinctiveness from competing tourism destinations. Blain *et al.* (2005) have provided the most complete definition of the term. Blain *et al.* (2005:337) outline destination branding as "the set of activities that support the creation of a name, symbol, logo, word, mark or other graphic that readily identifies and differentiates a destination; that consistently expresses the expectation of a memorable travel experience that is uniquely associated with the destination; that serves to consolidate and reinforce the emotional connection between the visitor and the destination; and that reduces consumer costs and perceived risk". The elements included in this definition all serve to create a destination image capable of influencing tourists' decisions with regard to visiting the destination that is being branded as opposed to competing destinations.

Table 2.2 provides a summary of key definitions of destination branding that were reviewed in this study.

Table 2.2: Summarised key definitions of a destination brand

Author(s)	Focus of definition
Ritchie and Ritchie (1998)	Name, logo, word, mark, or other graphic used for identification and differentiation of destinations.
Morgan and Pritchard (1998; 2002)	Unique combination of product characteristics that adds value and create awareness
Caldwell and Friere (2004)	Logos, symbols and names
Blain *et al.* (2005)	Name, logo, symbol, word, mark, or other graphics used to identify and differentiate a destination; create memorable travel experiences; consolidate emotional connection; reduce costs and risk of travellers

Source: Developed by author

The definition by Blain *et al.* (2005) was derived using the general branding theory and it provides a definition that is more holistic than simple logo development. Therefore, it is a complete definition that has concrete grounding from marketing sciences and congruent aspects of the branding theory. This is the only definition available in literature that follows demand and supply perspectives as its basis for defining the concept. Therefore, it is clear to note that the development of an effective destination brand must be done from both the demand and supply perspectives as a way of ensuring that all the multifarious aspects of brand management have been included.

The next section discusses the significance of brands in a destination context.

2. 2.3 Significance of destination brands

Brands have roles and significance that transcends beyond the signage, emblematic or symbolic projections they make to their intended target audience (Aaker, 1991, 1996; de Chernatony & Riley, 2010; Keller, 1993, 2003, 2008; Laforet, 2010). Within the tourism domain, destination brands bring awareness and demand a reaction through persuading tourists as customers of the need to take note of branded destinations (Amujo & Otubanjo, 2012; Cai, 2002; Chen & Tsai, 2007; De Nisco *et al.,* 2015; Ndlovu, 2009; Pike, 2005; Qu *et al.,* 2011; Schaar, 2013). Heath (2007:169) argues that it is this characteristic of the brand that usually results in the creation of lasting customer loyalty that can be regenerated through a strong association with brand values, tangible assets and emotional benefits (Choi & Cai, 2012). Hence, it can be seen that destination brands are significant in that they generate and increase the commercial value of the brand and influence the intention to travel (Chew & Jahari, 2014; Prayag, 2010).

Destination brands, therefore, convey brand images of the tourism destination and this greatly influences destination choice (Alvarez & Campo, 2014; Campelo *et al.,* 2014; Chen & Tsai, 2007; De Nisco *et al.,* 2015; Hung & Petrick, 2011; Prayag, 2010; Qu *et al.,* 2011; Whang, Yong & Ko, 2016). Therefore, it can be noted that the more favourable the destination's brand image, the greater the likelihood of tourists choosing it (Amujo & Otubanjo, 2012:90; Chen & Tsai, 2007; De Nisco *et al.,* 2015:306). It is from this context that a destination's brand is seen as a strategic

tourism asset that can be leveraged for competitiveness and attractiveness (George, 2001; Middleton & Clarke, 2001). Destination branding also enhances the destination's brand equity and its global competitiveness (Pike, 2008:175). Therefore, the development of a competitive and brand in the context of Zimbabwe is very significant as it will greatly influence tourists to choose it ahead of its peers such as South Africa, Namibia and Botswana.

The tourism industry is typically a high involvement industry. Consequently, destination branding plays a key role in reducing the choice from competing tourist destinations (Balakrishnan, 2008; Chen & Tsai, 2007; Pike, 2005; Prayag, 2010; Qu *et al.,* 2011; Tasci & Kozak, 2006; Tsai, Song & Wong, 2009). Apart from reducing destination choice (Amujo & Otubanjo, 2012:90), destination branding also comes handy in dealing with the effects of untouchability. It also significantly reduces the risk often involved in choosing a holiday destination (Prayag, 2010). Thus, Zimbabwe as a tourism destination will greatly benefit from destination branding given that it has safety challenges with its source markets. It is also imperative to note that one of the significant functions of destination brands is the way it helps destination marketers in segmenting international tourist markets (Clarke, 2000).

Competitive brands help organisations in various sectors of the economy to communicate why their products and services are important in meeting the needs of customers (Haigh & Knowles, 2004). Central to branding is that it is used as the basis for coordinating private sector efforts. Thus, if both private and public sector companies within the tourism sector subscribe to the same brand values and identity to the extent that trade partners are enthused about the destination, the brand would, therefore, resonate with the tourist, and in the end the destination brand becomes more efficient than individual efforts could be (Morrison & Anderson, 2002:5; UNWTO, 2005:46). Therefore, destination branding can become a footprint through which all tourist destination promotions and materials could be communicated to the intended target audience (George, 2001:172; Middleton & Clarke, 2001).

A number of scholars argue that destination brands are communicators (see for instance, Blain *et al.,* 2005; Chen & Tsai, 2007; De Nisco *et al.,* 2015; Hall, 1999; Pride, 2002; Qu *et al.,* 2011). Destination branding results in the creation of destination

strategic plans that are intended to construct strong brand identities upon which tourist destinations' attributes are selected. This is usually based on competitiveness and exclusivity of the looked-for destination brand identities (Balakrishnan, 2008, 2009; Chen & Tsai, 2007; De Nisco *et al.,* 2015; Gnoth, 2002). The aim of destination branding is, therefore, the creation of a communication strategy that is consistent and focused. This must be based on a careful selection of strategic combinations of the intangible values that customers perceives as important. Due to increasing product parity among tourist destinations, the need for tourist destinations to create exclusive identities that are able to differentiate them from competition cannot be overemphasised (Baker, 2007; Cai, 2002; Campelo *et al.,* 2014; Chen & Tsai, 2007; De Nisco *et al.,* 2015).

Destination brands are the most valued resources of a tourist destination (Balakrishnan, 2008). They give tourism destination's products an identity and characteristics. Therefore, as the destination's most valued asset, destination branding is important in that it helps tourists evaluate the attractiveness of the destination. More importantly, destination brands are important in that their process of developing a destination brand can be used as a way of aligning the behaviour of concerned stakeholders to effectively sell the destination from a unified point. Hence, destination branding seems also to play a key relational role that is used by many businesses to create competitive advantage.

Tasci and Denizci (2009:1) argue that destination marketing is important for sustainable tourism in an era of increasing competition. It is crucial to acknowledge that with increasing competition among tourism destination as well as decreasing efficiency of traditional marketing methods and the emergence of new and disruptive marketing techniques, there is a general consensus that brands are becoming one of the most important assets that organisations across sectors are building and managing (Keller, 2003; Kemp *et al.,* 2012; Krishnan, 2010; Laforet 2010;). Tourist destinations are embracing branding as a strategy for building competitive tourist destinations (Tasci & Denizci, 2009). However, the practice of building and managing brands is simpler within the consumer goods sphere and presents significant challenges to destination marketers due to the complexity of the tourism product

(Balakrishnan, 2009; Crouch, 2011; Balakrishnan, Nekhili & Lewis, 2011; Morgan *et al.,* 2002; Pike, 2005; Quintal *et al.,* 2014; Wang, 2011).

Though building and managing destination brands is significant in a tourism context, there are challenges idestinations face in doing so (Ayikoru, 2015:142; Balakrishnan, 2008; Pike, 2005; Tsai *et al.,* 2009) as many destinations are switchable and are problematic to segregate (Ayikoru, 2015; Balakrishnan, 2009; De Nisco *et al.,* 2015). These challenges are also possible in the context of brand Zimbabwe as a tourism destination. Complexity of destination branding practice is compounded by the fact that destinations exist as holistic entities (Jaworski & Fosher, 2003; Quintal *et al.,* 2014).

Regardless of the challenges faced by destinations in building and managing destination brands it is clear that, destination branding is a significant concept that destinations like Zimbabwe should fully embrace. As a result, the concept of destination branding is now extensively recognised as strategic in tourism (Amujo & Otubanjo, 2012; Campelo *et al.,* 2014; Gomez *et al.,* 2015; Pike *et al.,* 2010; Pike & Page, 2014; Quintal *et al.,* 2014). Zimbabwe also recognise the strategic importance of branding, and this is explained by the rebranding of the destination that occurred in 2011.

In conclusion, destination branding is significant to Zimbabwe as a tourism destination because it helps the destination to distinguish itself from competitors. DMOs across the world are adopting branding frameworks (Balakrishnan, 2009). Tourist destinations should differentiate themselves as a way of attracting the attention of tourists with diverse choices (Campelo *et al.,* 2014; Candela & Cellini, 2006; Chen & Tsai, 2007; De Nisco *et al.,* 2015; Pechlaner, Raich, Zehrer, 2007). In addition to this, the destination can use it as a strategy to influence the tourist's intention to travel and also aid tourists in choosing Zimbabwe. The more favourable Zimbabwe's destination brand is, the greater the likelihood of tourists choosing and visiting Zimbabwe. Therefore, Zimbabwe's destination brand is a strategic tourism asset that can be leveraged for destination competitiveness and attractiveness.

2.3 DESTINATION BRANDING ASPECTS

The previous section focused on defining the concept of destination branding as well as its significance in a destination context. The focus of this section is to discuss and review literature concerning key aspects of destination branding. These aspects include destination branding elements, destination image and identity, destination brand positioning and destination branding loyalty.

Tracking performance of tourist destinations' brand positions in relation to competitiveness and attractiveness over time is one area requiring academic attention (Pike, 2009; Pike & Page, 2014; Volgger & Pechlaner, 2014). Tourism destinations are usually engaged in positioning and repositioning campaigns of their brands, but limited research has been done to evaluate such efforts (Bianchi, Kerr & Patti, 2010; Kladou *et al.,* 2015; Pike, 2005, 2009; Pike, Volgger & Pechlaner, 2014) for an industry that is facing a growing global competition for tourists (Assaker, Hallak, Vinzi & O'Connor, 2013; Ayikoru, 2015; Balakrishnan, 2009; Du Plessis *et al.,* 2015; Kim & Lehto, 2013; Morgan *et al.*, 2002; Tasci & Denizci, 2009) generating international revenues of US$2 billion per day (Balakrishnan, 2009:611). Lack of evaluation of destination branding efforts is a very important gap that this study seeks to fill, first in the Zimbabwean context and secondly in the broader spectrum of tourism research.

There is a growing amount of investments into destination branding by DMOs globally (see for example, Ferraro *et al.,* 2005; Pike, 2009; Pike & Page, 2014), though with limited efforts to empirically evaluate such investment efforts. Though DMOs have a challenging decision-making process (Gartner & Hunt, 1987; Pike, 2005; Pike & Page, 2014; Volgger & Pechlaner, 2014) there is a dearth of systematic research with regard to the evaluation of whether DMOs' efforts have been effective in meeting destination marketing objectives (Pike & Page, 2014). This lack of systematic research has been reported even in mature destinations such as Australia, North America and Europe (Pike & Page, 2014). Asia is yet to attract similar research interest (Kladou *et al.,* 2015) and the same is said of Africa (Pierret, 2011). Therefore, it appears as if there is little interest in critically assessing destination brand performance (Pike & Page, 2014). This is further exacerbated by lack of studies that link branding to competitiveness and attractiveness of tourism destinations.

The following section discusses some aspects of destination branding that are crucial in the assessment of competitiveness and attractiveness of a destination brand.

2.3.1 Destination brand elements

Destination branding is a complex area of study that needs to go beyond the theories of product and corporate branding (Ooi & Stoeber, 2010). The contribution of this current study is to bring about a broader understanding of destination branding by means of critically assessing brand Zimbabwe in the context of destination competitiveness and attractiveness. As a result, this discussion stems from the importance of destination brand elements aspects:

- Brand name;
- Logo and;
- Slogan.

Research is yet to answer the role and extent to which destination brand elements are important to destinations, including how they contribute towards destination competitiveness and attractiveness (Kladou, Kavaratzis, Rigopoulou & Salonika, 2016:1). There is a general lack of understanding among practitioners and scholars with regard to the effectiveness of destination brand elements, particularly logos and slogans (Pike, 2016). Within the Zimbabwean tourism context, there is a noticeable research gap regarding the effectiveness of **Zimbabwe: A World of Wonders** as part of the destination's slogan. Therefore, the intended contribution of this study is to provide Zimbabwean tourism with a clear comprehension of the significance of destination brand elements that tourists attribute to these elements in the assessment of the destination brand's competitiveness and attractiveness.

Destination brand elements are important stimuli and represent the destination in the minds of the consumers (Kladou *et al.,* 2016); in this case tourists who intend to visit Zimbabwe as a tourism destination. The destination's image that is projected by DMOs, is more often the sum total of various images that are outside the control of destination marketers (Tasci *et al.,* 2007). Various representations of the destination are in the news, films, novels, documentaries and Internet (Tasci *et al.,* 2007). Consequently, this distorts the claims that are usually captured in the destination's

slogans and logos. The focus of what causes this distortion is beyond the scope of this study.

The impact of destination branding elements on destination competitiveness and attractiveness is yet to be established. The designing of new destination logos has been criticised in the wider destination branding practices (Munar, 2011; Oliveira & Panyik, 2015), suggesting that destination brand elements are irrelevant (Kladou *et al.,* 2016). Tourists rarely use destination brand elements in their narratives and interactions (Munar, 2011:302). However, destination brand elements are significant in a number of ways. Destination brand elements are important identifiers that often leave impressions on others (Kladou *et al.,* 2016). Therefore, it is critical to note that the destination's brand elements, that is, the name, logo, and slogan, are important in shaping the perceptions that people hold on the branded tourism destination.

According to Kladou *et al.* (2016), destination brand elements are crucial in mirroring. This entails the process where people are affected by what other people think in their evaluations of tourism destination brands. This is best represented in the construct of brand reputation, which is an outcome of the destination's cumulative image (Fombrun, Gardberg & Sever, 2000). The third role of destination brand elements is that they act as a platform through which tourism destinations reflect their identity in culture (Gallarza, Saura & Garcıa, 2002; Hatch & Schultz, 2002; Kladou *et al.,* 2016; Saraniemi & Kylänen, 2011). Fourthly, destination brand elements also act as vehicles through which tourist destinations are able to express cultural understanding (Kladou *et al.,* 2016). This requires the destination's brand elements to make the destination's culture known to others. This study used Zimbabwe's destination brand positioning to examine the brand's attractiveness and competitiveness. In this regard, the role of Zimbabwe's brand elements in expressing culture was, therefore, assessed.

Lastly, the role of destination brand elements is to influence tourists' behavioural intentions (Kladou *et al.,* 2016; Kotler & Gertner, 2002; Morgan *et al.,* 2002). The major justification of investment in destination branding by DMOs has been its ability to influence the behaviour of consumers (García *et al.,* 2012). According to Leisen (2001), the symbiotic relationship between favourable destination brand image and behavioural intention is undeniable. Though destination branding and brand image

formation are complex processes (Moutinho 1987, cited in Kladou *et al.,* 2016), it is clear that brand elements are a crucial part of brand image which in turn influences visitation (Kladou *et al.,* 2016).

The destination's brand image has an influence on the tourists' travel decisions and destination brands are therefore considered important in persuading people to visit certain destinations (Kladou *et al.,* 2017; Kotler & Gertner, 2002; Morgan *et al.,* 2002). Based on this, brand elements do play a critical role in identifying destinations with positive brand image and to some extent in influencing the behavioural intentions (Kaldou *et al.,* 2017). Zimbabwe's brand image influences tourists' travel decisions and destination brands are important in persuading tourists to visit certain places. The implication of Zimbabwe's brand elements on behavioural decisions was assessed by means of direct questions on whether tourists were likely to be influenced to make revisit intentions and recommend Zimbabwe to family and friends.

The next section discusses and analyses destination brand image.

2.3.2 Destination brand image

The tourism industry has been characterised by growing rivalry mainly because of the increasing acceptance of a globalised world coupled with advances in technology (Ayikoru, 2015, Williams, Inversini, Buhalis & Ferdinand, 2015). Tourism destinations, therefore, are faced with the effects of changing global economies and culture (Dwyer *et al.,* 2009:63). Rivalry between tourist destinations is rife (see,Anholt, 2007; Assaker *et al.,* 2013; Balakrishnan, 2009:611; Du Plessis *et al.,* 2015; Dwyer *et al.,* 2009: 63; Kim & Lehto, 2013; Tsai *et al.,* 2009). Countries are competing for funds, foreign direct investment, tourists etc. (Anholt, 2007; Buhalis, 2000; Konecnik & de Chernatony, 2013).

Due to strong competition among destinations (Assaker *et al.,* 2013; Ayikoru, 2015; Balakrishnan, 2009; Camison & Fores, 2015; Du Plessis *et al.*, 2015; Kim & Lehto, 2013:117; Tasci & Denizci, 2009:1; UNWTO, 2011), the task of building a positive destination image cannot be over emphasised (Baloglu & McCleary, 1999; Campelo *et al.,* 2014; Chen & Tsai, 2007; De Nisco *et al.,* 2015; Hankinson, 2010; Pike, 2002;

Prayag, 2010; Qu *et al.,* 2011; Tsai *et al.,* 2009). The destination's brand image is an important construct of destination branding. Pike (2009) identified the need for further research in branding. This was after 74 articles were reviewed and literature and methodological gaps were identified. Therefore, a greater conceptual understanding of tourism development trends for formulation of destination branding strategies is imperative (Dwyer *et al.*, 2009). Given that tourism business does not happen in isolation, it is imperative for this study that in developing the destination branding framework, efforts will be made to critically assess the implication of other sectors of the economy, such as media and political players in the development and assessment of destination identity for brand Zimbabwe.

Destination brand image has most of its origins linked to marketing sciences (Gardner & Levy 1955 cited in Pike, 2009). Notwithstanding the importance of destination image, the conceptualisation of this construct has remained dispersed (White, 2004; Zhang, Cai & Lu, 2014). As a result, the theory and conceptualisation of brand image in a destination context remains unclear (Fakeye & Crompton, 1991; Prayag, 2010:462; Qu *et al.,* 2011) as well as its formation process (Pike, 2002). However, research on destination image continues to attract a constant stream of researchers' interests (see for instance,Beerli & Martin, 2004a; Chen, Lai, Petrick & Lin, 2016; Crockett & Wood, 1999; Hall, 1999; May, 2001; Morgan, Pritchard & Piggot, 2002; Tseng, Wu, Morrison, Zhang & Chen, 2015).

Brand image refers to the perceptions and associations of the brand that are held in the memory of the consumers (Keller, 2008). In a tourism context, destination image is also defined as "the sum of beliefs, ideas and impressions that a person has of a destination" (Crompton, 1979 cited in Qu *et al.,* 2011). It also refers to "the totality of what tourists know and believe about tourism offering" (Saayman, 2001:167). The destination's brand image is fashioned by well-designed features such as a good transport network, atmosphere, infrastructure, tourism amenities, tourism offerings, branding and accessibility of the destination (Prayag, 2010:466; Saayman, 2001:168). It can therefore be argued that image in a tourism context is a multidimensional construct (Boo *et al.,* 2009:221). Cognitive and affective features, such as orientation of family and affiliation with celebrities, are imperative in projecting a positive tourist brand image (Gnoth, 2002). All elucidations on destination brand image congregate in

relating it as a skewed interpretation that tourists make of a complex reality (Andreas-Caldito, Sanchez-Rivero & Pulido-Fernandez, 2013).

The destination's brand image acts as a significant influence on pre-visitors' decisions regarding which tourism destination to choose (Alvarez & Campo, 2014; Amujo & Otubanjo, 2012:90; Chen & Tsai, 2007; De Nisco *et al.,* 2015:306; Hung & Petrick, 2012; Költringer & Dickinger, 2015; Leisen, 2001; Pechlaner *et al.,* 2007; Prayag, 2010:465; Qu *et al.,* 2011; Whang, Yong & Ko, 2016). The destination's brand image is a crucial element that influences tourists' post-visit behavioural intentions and decisions (see for instance,Assaker, Vinzi & O'Connor, 2013; Beerli & Martin, 2004b; Cheng & Lu, 2013; Chew & Jahari, 2014; De Nisco *et al.,* 2015:306; Hosany & Prayag, 2013; Pike & Ryan, 2004; Zeugner-Roth & Žabkar, 2015) indicating that the destination's brand image is a crucial aspect in building destination loyalty. It also gives destination marketers the opportunity to appropriately design and promote tourism destinations. The destination's brand image it projects to prospective tourists greatly influences the destination's attractiveness. Tourists are likely to choose destination brands whose images are similar to the tourist's authentic images. However, the association concerning destination brand image and tourist behaviour intentions remains a contested matter (Wu, 2016).

There is a symbiotic link regarding tourists' satisfaction and destination choice (Bigné, Andreu & Gnoth, 2005; Gartner, 1989, 1993; Kozak & Rimmington, 2000). Revisit decisions and satisfaction are closely linked to each other (Court & Lupton, 1997; Kozak & Rimmington, 2000) and often result in positive word-of-mouth recommendations (Hultman *et al.,* 2015). According to Kozak and Rimmington, (2000), destination brand image also affects the tourists' perceptions about destination quality; as a positive destination brand image corresponds with a higher destination brand quality. This perception influences and determines tourist satisfaction. The choice of holiday destination always begins with collecting information prior to visitation (; Chen & Tsai, 2007:1116; Kotler & Gertner, 2004:42). Friends, relatives, previous experiences and media sources are important sources in conveying destination brand image to the tourists (Ekinci, 2003:22; Roodurmun & Juwaheer, 2010). Tourists depend on their knowledge in evaluating whether a tourism destination brand is able to satisfy their travel needs. Purchase decisions usually involve risk assessment. The

risk assessment is intertwined with the degree to which the tourist is able to trust the destination brand (Hsu & Cai, 2009; Cai, 2009). Therefore, the destination's positive brand image is crucial in increasing the tourist's trust with regard to choosing it (Hsu & Cai, 2009).

Intangibility and the inherent lack of consumption trial suggests that tourism destinations that have perceived positive destination images are likely to be chosen by prospective tourists (Chew & Jahari, 2014; De Nisco *et al.,* 2015; Pike, 2009; Qu *et al.,* 2011). Nicolau and Mass (2006) argue that the process of choosing destinations is complex. Despite it being a complex process, the use of brand image in the tourist's decision making process cannot be overemphasised (Amujo & Otubanjo, 2012:90; De Nisco *et al.,* 2015:306; Prayag, 2010:465). Due to intangibility and lack of consumption trial, tourism destinations are often engaged in creating induced destination brand images (Govers *et al.,* 2007). Zimbabwe has been using this kind of destination imaging after being labelled an unsafe tourist destination by Western countries following the land reform programme and political violence that characterised the 2002 and 2008 presidential elections. Negative destination brands are a result of socio-political and natural antecedents (Amujo & Otubanjo, 2012:90). This is specifically the case with Zimbabwe as a tourism destination. Limited research has been done to empirically assess the effectiveness of such destination marketing efforts within the context of Zimbabwean tourism.

Kladou *et al.* (2017:430) note that branding investment in a tourism context has been justified on the basis of the brand's potential to influence the behaviour of tourists. As stated earlier, tourists normally choose to visit tourism destinations whose brand image is favourable (Leisen, 2001; Kladou *et al.,* 2017). Therefore, there is a symbiotic relationship between a favourable destination brand image and behaviourable intention (Leisen, 2001). Destination brand choices are also influenced by push and pull factors (Nicolau & Mas, 2006; Hong, Kim, Jang & Lee, 2006; Tam, 2012). Destination choice do emanate from the tourists' assessment of the destination's attributes that pulls them as well as their perceived utility values (Kim *et al.,* 2003).

Relaxation, personal development and new cultural experiences are push factors that influence destination choice (Tam, 2012). The attractiveness of the destination

determines the pull factors that influence destination choice (Tam, 2012). However, Tam (2012:218) notes that a destination's attractions constitute the primary elements of what enhances the destination's brand appeal, "hence a key motivator for visitation". The assessment of the motivations of why tourists are visiting Zimbabwe is therefore crucial in determining the destination's attractiveness and competitiveness.

Approaches to studying destination image have advanced beyond the issue of merely understanding tourists' perceptions (Hsu & Cai, 2009). Destination branding birthed a platform upon which numerous issues of destination brand image can be examined. A universally accepted approach to destination brand image is yet to emerge (Prayag, 2010:462). There is a clear shortage of studies and theoretical models that focus on destinations like Zimbabwe that have suffered from long-term and continuous negative destination brand images (Amujo & Otubanjo, 2012; Avraham & Ketter, 2008, 2013; Gertner & Kotler, 2004). DMOs in destinations like Zimbabwe, for example, appear to be faced with multiple challenges when dealing with prolonged negative stereotypes and prejudices that are associated with the destination. Research that links destination brand image with competitiveness and attractiveness in the empirical context of Zimbabwe is scanty. As a result, this study thus broadens the literature on destination brand assessment in relation to the competitiveness and attractiveness of brand Zimbabwe as a tourist destination using both supply and demand perspectives.

The next section discusses the aspect of destination brand identity.

2.3.3 Destination brand identity

There is confusion with regard to the real differences concerning destination brand identity and destination brand image. This confusion stems from complexities that surround the definition of the term destination brand. Destination brand identity refers to the image to which a tourism destination aspires, while destination brand image is the real image that is held by consumers (Page & Pike, 2014:211). The two concepts are constructed using the demand and supply perspectives (Cugno *et al.,* 2012; Formica & Uysal, 2006; Kapferer, 1998:32; Nandan, 2005). In a destination context, the DMO sends the image it wants the tourism destination to be perceived as using unique features (Campelo *et al.,* 2014; De Nisco *et al.,* 2015). Florek *et al.* (2006) note

that from the demand perspective, tourists will decide how they perceive the destination's brand in reality and they normally store these images in their minds (Amujo & Otubanjo, 2012). Hence the need for the study to critically assess brand Zimbabwe's competitiveness and attractiveness from the demand and supply perspectives.

Brand identity denotes the vision of how a tourism destination brand is going to be perceived in the marketplace for differentiation purposes (Amujo & Otubanjo, 2012; Cai, 2002). For the purposes of this study, Zimbabwe's vision is to be identified as **Zimbabwe: A World of Wonders** in the market. Aaker (1996) argues that, apart from the identifier role, brand identity seeks to offer destination marketers with a sense of direction, meaning and purpose. This is imperative for strategic associations with the brand in question. Destination brand image plays a critical role towards the configuration and development of a strong tourist destination brand identity (Amujo & Otubanjo, 2012; Cai, 2002; Campelo *et al.,* 2014; Chen & Tsai, 2007; De Nisco, 2015 Florek *et al.,* 2006; Prayag, 2010). Therefore, destination brand image is a manifestation of destination brand identity. Brand identity of a tourism destination helps tourists to build a tourism destination's brand image in their minds. Therefore, it is imperative to determine the contribution of brand identity and image towards Zimbabwe's competitiveness and attractiveness as a tourism destination.

The next section discusses the aspect of destination brand positioning.

2.3.4 Destination brand positioning

A handful of academic papers address destination brand positioning particularly as an important construct of destination branding (Ndlovu, 2009; Pike, 2009; Pike & Mason, 2011). Swystun (2007) notes that destination brand positioning is grounded on the premise of managing the destination in a manner that aims to differentiate it from competition. According to Seric (2014:8), the destination's brand position is also based on the associative connections that are deemed to be unique to the destination's offering. The objective behind destination brand positioning is to strengthen the tourism destination's associative connections to its attractiveness feats. The attractiveness of a destination brand is strongly influenced by the extent to which

destination marketers have adequately positioned it (Seric & Lukovic, 2011). A well-positioned destination brand is crucial for the generation of loyalty, competitive advantage, profits, price competitiveness, positive brand association, investments and effective marketing efforts (Seric & Lukovic, 2011). In addition to this, the destination's brand position also affects the tourist's ultimate choices and decisions (Kavaratzis & Ashworth, 2005:506).

Destination marketing that is done by destination marketers is an attempt to achieve a balance and congruence between destination's brand identity and its image. Limited research has been done in the context of Zimbabwean tourism (Ndlovu, 2009). Therefore, marketers must ensure that a destination's brand identity must be positioned correctly as to fight a growing noise that emanates from emerging tourism destinations. Paucity of research exists in terms of destination brand identity and positioning (Pike & Page, 2014:212). The effectiveness of destination brand positions needs further research. It is in this context that this study seeks to critically assess the competitiveness and attractiveness of *Zimbabwe: A World of Wonders*.

This assessment is critical in determining whether Zimbabwean tourism authorities have been able to meet their destination marketing objectives by means of destination branding methodologies. According to Conrady and Buck (2011), qualitative and quantitative tourism marketing research methods have generated conflicting data on a number of occasions. As discussed previously in section 2.3.1, destination brand image is significantly formed through brand influence, and therefore, this study will contribute to literature with information on how Zimbabwean tourism will deal with tourist targeting and segmenting. Therefore, by positioning the destination brand correctly, it is possible for Zimbabwe to prompt a first visit of a prospective guest and this will also strengthen the loyalty of the existing customers.

The next section discusses the aspect of destination brand loyalty.

2.3.5 Destination brand loyalty

Defining a target market is an essential requirement for destination branding because there are many situations that could easily arise where a tourist destination may seem

positive to one segment of the tourist market while ineffective to another segment (Hankinson, 2004 cited in Balakrishnan, 2009:617; Fan, 2006; 2010). This is important if a destination wants to enhance its marketing and tourism income through destination loyalty (Rangan, Elberse & Bell, 2006). Destinations today are looking for a mixture of vacation and business travellers as a way of building sustainable markets (Hankinson, 2005). Successful branding often results in the development of loyalty by means of having customers develop a special relationship with the brand (Aaker, 1996). Loyalty of target markets gives the brand credibility and this is beneficial for tourism destinations (Bowen & Shoemaker, 1998; Konecnik & Go, 2008; Krishnan, 2010). This further exhibits the intricacies that surround destination brand building and management practices.

According to Tasci (2017), the loyalty of customers is the most critical construct of destination marketing. Pike and Page (2014) note that the objective of destination brand is to stimulate brand loyalty. Destination brand loyalty is either explained as a behavioural or attitudinal concept (Baloglu, 2002; Almeida-Santana & Moreno-Gil, 2017). In the behavioural context, destination brand loyalty refers to the repeating purchasing frequency of a customer (Tellis, 1988). Within the marketing sciences, research shows that customers are capable of being loyal to more than one brand (Yim & Kannan, 1999). There is limited research on this aspect within the tourism literature (Tasci, 2017).

Destination brand loyalty can be horizontal in nature, meaning that tourists can be loyal to more than one destination at the same time (McKercher & Tse, 2012). A comprehensive understanding of tourists' loyalty is important for Zimbabwe as a tourism brand to identify its different market segments (Petrick, 2005). Research has been done in the context of differentiating first-time visitors and repeat visitors (Fakeye & Crompton, 1991; Kozak, 2001; Weaver & Lawton, 2011), differences in the visitors' socio-demographic aspects (Li, Cheng, Kim & Petrick, 2008; McKercher & Wong, 2004), motivations and information search (Li *et al.,* 2008) as well as the perceived destination's image (Fakeye & Crompton, 1991). No research has attempted to link destination brand loyalty to destination competitiveness.

The image of a tourism destination is a key antecedent of destination brand loyalty (Chen & Tsai, 2007; Prayag & Ryan, 2012). Research that examined antecedents of destination brand loyalty shows that tourist satisfaction is one of the important predictors of loyalty in a destination context (Bigne, Sanchez & Sanchez, 2001; Hosany & Prayag, 2013; Kozak & Rimmington, 2000; Petrick, Morais & Norman, 2001). Tourists who are satisfied with the image of the destination always show their loyalty to the destination through repeat business and positive recommendations to family and friends (Chen & Tsai, 2007; Prayag, 2008; Hosany & Prayag, 2013). The implications of satisfaction on brand loyalty are, however, different from one destination to the next (Kozak & Rimmington, 2000).

Research on destination brand loyalty is challenged by a number of limitations (Ekinci *et al.*, 2013). Michels and Bowen (2005), argue that measuring repeat visitation is difficult in a tourism context because of the costs involved and the need to explore newer destinations in a short space of time. Ekinci *et al.* (2013) further argue that the measurement of repeat visitation is challenging because there is no defined reference time through which tourists are supposed to return to the destination. Therefore, destination brand loyalty is not an adequate approach through which repeat business must be assessed (Sirakaya-Turk *et al.,* 2015) as tourists go on holidays on a yearly basis. Considering this gap, Bastida and Huan (2014) argue that there is a need for research to widen variables that influence destination brand loyalty, as many of the existing approaches are yet to clearly correlate the elements influencing tourist loyalty in a destination context.

Globally, comparatively limited research has been reported in terms of destination brand performance (Kladou *et al.,* 2015; Kim, Kim & An, 2003; Pike, 2005; 2009; Tasci & Denizci, 2009). Literature on the assessment of destination brand performance in Zimbabwe is scanty and limited. Therefore, the need for a framework that assesses the effectiveness of destination branding in relation to competitiveness and attractiveness is of utmost importance for Zimbabwean tourism. Investigation on destination brand performance has been more biased towards the examination of branding as a concept using a demand side perception (Anholt, 2005; Etchner & Ritchie, 1993). The supply side approach to this concept has only started recently (Balakrishnan, 2008; Blain *et al.,* 2005; Cai, 2002; Hankinson, 2007; Piha *et al.,* 2010).

Research has also integrated diverse stakeholders, suggesting a significant departure from the conventional tourist focus to local residents' perspectives (Hankinson, 2009; Kavaratzis & Ashworth, 2008; Zenker & Beckham, 2013; Zouganeli, Trihas, Antonaki & Kladou, 2012). Gnoth (2007) focused on the destination's specific values and meanings as a way of determining destination brand performance. The tourism destination's resources were also used in destination branding research as a means of evaluating brand performance and productivity (Tasci & Denizci, 2009). However, there is a growing increase of tourism destination branding research that is still following a demand side approach (Etchner & Ritchie, 1993; Kladou *et al.,* 2015). This study examines the concept of destination branding using both the demand and supply side perspectives.

In conclusion, the concept of destination branding remains poorly understood by both scholars and practitioners. It is yet to become a mature domain of research. It is critical for Zimbabwe to understand the concept and how it contributes to destination competitiveness and attractiveness, given the resources that are currently being invested in destination branding by the Zimbabwe Tourism Authority. Better theoretical and conceptual appreciation of destination branding concepts is required for Zimbabwe as a tourism destination in shaping its destination branding efforts. This will be achieved by means of a framework that will be developed to assess the performance of the destination's brand by using both the demand and supply side perspectives.

The next section discusses the destination branding frameworks.

2.4 DESTINATION BRANDING FRAMEWORKS

Research is yet to suggest a framework that assesses the effects of branding in relation to competitiveness and attractiveness of a tourist destination. The current study tries to do so by developing a context-specific framework that critically assess brand Zimbabwe's competitiveness and attractiveness as a tourism destination. The contribution of this framework will be its context and it offers the Zimbabwean tourism a potential performance assessment tool that can be used in determining the extent to which a competitive and attractive brand identity and image has been successfully

positioned in the target market. Considering the growing level of academic interest and growing destination branding investments, it is timely for this study to critically assess the effects of branding in relation to competitiveness and attractiveness of a tourist destination using both demand and supply side survey methodologies.

The first conceptual model of destination branding was proposed in 2002 and it was built on the proposition that, "image formation is not branding, albeit the former constitutes the core of the latter" (Cai, 2002:722). Image building is one step closer, but there still remains a critical missing link: the brand's identity" (Cai, 2002:722). Arecursive process is followed when branding destinations. It seeks to optimise a reliable combination of brand elements that uniquely identifies and projects a positive image of the destination brand (Cai, 2002; Campelo *et al.,* 2014; Chen & Tsai, 2007; De Nisco *et al.,* 2015; Hosany *et al.,* 2006; Prayag, 2010; Qu *et al.,* 2011). This framework by Cai (2002) incorporates the definitions from the general branding theory as propounded by Aaker (1991) and Keller (1998) in emphasising the role of destination image building within a tourist destination context.

The destination branding model in Figure 2.2 explains the recursive nature of branding in a destination context. It has the propensity to orbit round the principal axis formed by the brand elements mix, brand identity and brand image. Branding a destination is a process that starts with the correct choice of brand elements, which must be carefully chosen by destination marketers as the destination's trademark (Cai, 2002). Literature shows that the choice of the destination's brand elements must be strategic (Balakrishnan, 2009; Blain *et al.,* 2005; Schaar, 2013). The choice of brand elements, slogans, logos must help in distinctly identifying the destination. Robust and dependable brand relations that reveal destination attributes, affective and attitude components of an image are shown in Figure 2.2 as the 3As on the right.
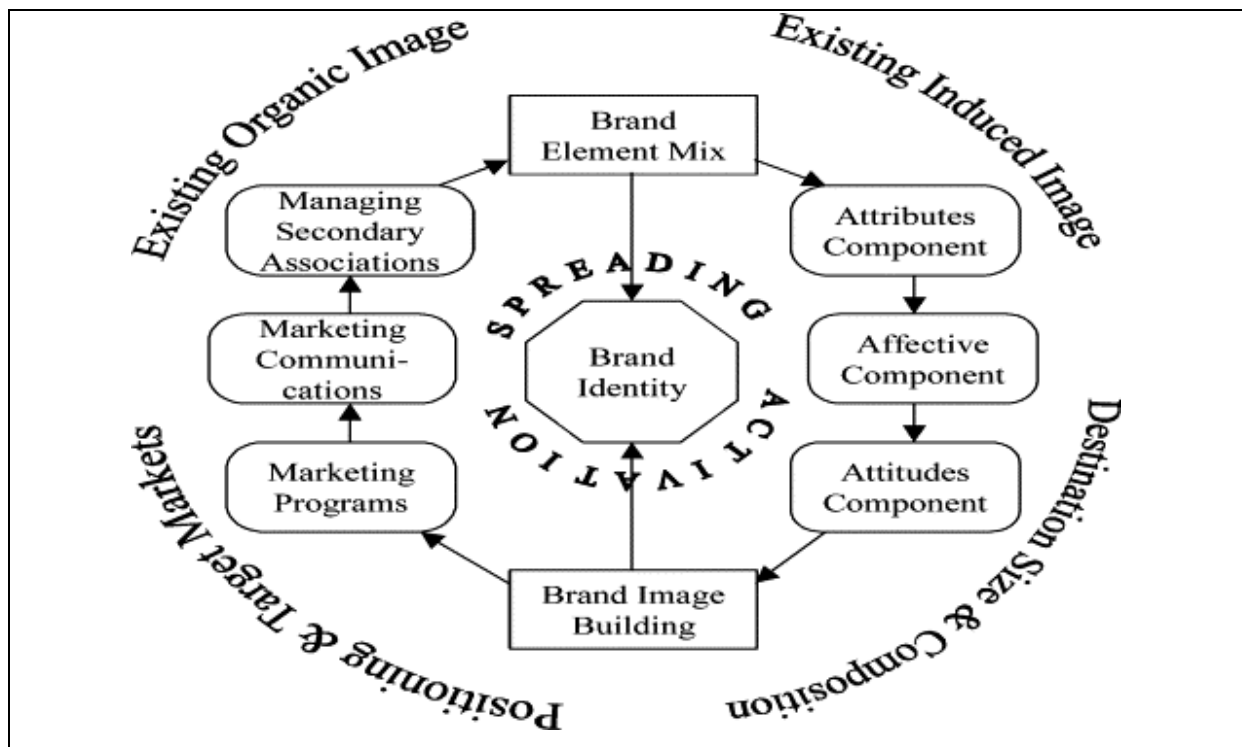
Figure 2.2: Cai's model of destination branding
Source: Cai (2002:725)

In 2005, Iliachenko (2005) developed another destination branding model. Culture, history and nature were used as key constructs in the development of the destination branding model. It is argued in this model that regional culture, history and nature dimensions work together to synergistically produce an exclusive brand name of the destination. The model claims that, for a tourism destination brand to succeed in distinguishing itself from competition, the destination brand must be attractive and easily connected to destination attributes like culture, nature and history (Iliachenko, 2005). Therefore, it is crucial for this study to assess the effect of destination characteristics such as culture, history, and nature on Zimbabwe's attractiveness as a tourism destination.

The most important concept in destination branding is the notion of destination brand equity (see for instance Cai, 2002; Gartner, 2014; Konecnik & Gartner, 2007). Aaker (1991, 1996) and Keller (1993, 2003, 2008) made integral contributions to brand building and management. Brand equity refers to "a set of assets (and liabilities) linked to a brand's name and symbol that adds to (subtracts from) the value provided by a

product or service to a firm and/or that firm's customers" (Aaker, 1991:16). In this definition, Aaker (1991) discusses the components of brand equity and its measurement. More recently, the concept of brand equity has been explained as the ability of the brand to aid "competitive advantage by means of conveying additional value to the "branded" as opposed to the "non-branded product, service or corporation" (Andéhn, Kazeminia, Lucarelli & Sevin, 2014:3).

The models of branding by Aaker (1991) and Keller (1993) are extensively applied, though by fewer researchers in the context of destination branding (see for instance, Balakrishnan, 2009; Bianchi & Pike, 2011; Boo *et al.,* 2009; Gartner & Ruzzier, 2011; Kladou *et al.,* 2015; Kladou & Kehagias, 2014; Konecnik, 2006; Konecnik & Gartner, 2007; Lockshin & Spawton, 2001; Im, Kim, Elliot & Han, 2012; Pike *et al.,* 2010; Pike, 2007, 2009, 2010). Destination brands as strategic resources have begun to be investigated in tourism research (Balakrishnan, 2009). The CBBE model originally developed by Keller (1993) has engrossed extensive curiosity in tourism literature with some using it in computing tourist destination performance (see for instance, Konecnik, 2006; Konecnik & Gartner, 2007; Pike 2007). Research that delves into destination brand equity is becoming increasingly documented (Hankinson, 2015:22).

Literature shows that the major components required for building destination's brand equity are brand awareness, brand image, brand quality and brand loyalty. Research also shows that destination brand equity is an under-researched area. Future research must extend the discussion to include destination brand outputs like destination brand loyalty and tracking the impact of rebranding and reposition strategies. This study found that the application of brand equity as a measure of destination's brand performance was done more than 16 years ago (see Lockshin & Spawton, 2001). The study will employ the same constructs in assessing the destination's competitiveness and attractiveness. Zimbabwe has been investing in a number of destination branding strategies, but there is no study to date that has attempted to track and see how competitive and attractive the brand is.

More recently, Garcia, Gomez and Molina (2012), developed a model that was derived using a stakeholder approach and the model was empirically applied in Spain. The theoretical premise of the model is that the success of destination branding is not only

dependent on brand value perceptions of tourists. However, Pike (2005) argues that these perceptions must be aligned with the views of local residents and entrepreneurs. While their model is useful for destination branding, (Hankinson, 2004; Pearce & Schanzel, 2013), the model itself has not been empirically applied in African destinations. In addition to this, developing destination branding strategies for multiple positioning is not an easy task (Hankinson, 2009; Pike, 2009).

There is a clear lack of destination branding research within Africa, particularly from a Zimbabwean tourism context as suggested in Table 2.3 below. Geographical allotment of destination branding models is predominantly European (Kladou *et al.,* 2015:195) and American. Africa is yet to attract similar research interest despite the fact that a number of tourism destinations are involved in destination branding (Pierret, 2011). The application of branding models in an African context has been done by South African researchers, focusing on branding in member driven organisations (Laurens, 2013) and the application of branding to arts festivals (Burger, 2015). However, branding models developed to date are not universal. It remains debatable if the existing models are even purely applicable to destinations they have been modelled for due to lack of empirical validation which further compounds the challenges of applicability elsewhere. Given the nature of Zimbabwean tourism and politics, it is imperative for this study to develop a context-specific framework that is tailor-made to explain the circumstances in the destination.

Table 2.3: A summary of destination branding models

Source	Focus of modelling	Destination
Clarke (2000)	Brand box model	United Kingdom
Cai (2002)	Rural tourism destinations	United States
Caldwell & Freire (2004)	Application of brand box model	United Kingdom
Iliachenko (2005)	Cultural dimensions; Historical dimensions; Natural dimensions	Sweden
Konecnik & Gartner (2007)	CBBE	Slovenia
Pike (2009)	CBBE	Australia
Pike *et al.,* (2010)	Application of CBBE to long-haul destinations	Australia

Nam *et al.,* (2011)	Application of CBBE in hotel branding	United Kingdom
Garcia *et al.,* (2012)	Index creation and measurement of destination branding success	Spain
Laurens (2013)	Brand value model in social organisations	South Africa
Kladou & Kehagius (2014)	Dimensions of brand equity	United Kingdom
Burger (2015)	Arts Festivals brand modelling	South Africa
Steyn (2015)	Brand image optimisation framework	South Africa

Source: Developed by author

The next section discusses branding in the context of Zimbabwean tourism.

2.5 DESTINATION BRANDING IN ZIMBABWE: A HISTORICAL CONTEXT

Zimbabwe has a history of formal and informal branding. In 1980, following independence from Britain, Zimbabwe branded herself as "*Discover Zimbabwe*". This was done as a means to position Zimbabwe in the international tourism market as an emerging destination brand. However, this did not gain acceptance from practitioners as a result of the absence of collaboration during the branding process for the destination (Ndlovu & Heath, 2010). "*Discover Zimbabwe",* was discarded in favour of "*Africa's Paradise". "Africa's Paradise"* was believed then to be capable of addressing brand associations, brand perceptions, brand image and brand positioning issues of Zimbabwe as a tourism destination (Ndlovu & Heath, 2010).

The tourism industry is affected by political turmoil and economic meltdown (Morgan *et al.,* 2004). Negative destination brands emanate more from deep-seated socio-political and natural antecedents than by design (Amujo & Otubanjo, 2012:91). *Africa's Paradise* lost its "paradise" destination brand appeal during the period 2000 – 2009. Zimbabwe's destination brand appeal was affected by undemocratic tendencies, land seizures, violence, corruption, bad governance and a hostile business environment (Mkono, 2010; Ndlovu & Heath, 2010). Before independence, Zimbabwe as a tourist destination was characterised by an oppressive colonial system, war, sanctions and numerous other challenges. The troubles that characterised the "paradise" destination brand were economic and political crises that triggered world-record hyperinflation

levels. This inflation record made international credit and debit cards unable to transact on the domestic market. There were acute shortages that made Zimbabwe the "butt of jokes" as a tourist destination.

As a tourism destination, Zimbabwe embraced a "bad boy" image tag as it was viewed to be a pariah state where terror reigned supreme. A number of marketing initiatives were employed as a way of dealing with Zimbabwe's destination image problem that affected visitorship, as the destination's major tourist markets warned their citizens not to visit Zimbabwe. One of the strategies used was to rebrand Zimbabwe's tired and tarnished destination brand – *Africa's Paradise* – to *Zimbabwe: A World of Wonders. Zimbabwe: A World of Wonders* brand was spearheaded as part of the national rebranding efforts by the then office of the Deputy Prime Minister during the life of the inclusive government in 2011. The objective of this strategy was an attempt to reshape Zimbabwe's destination brand image and identity.

Under *Zimbabwe: A World of Wonders,* Zimbabwe's brand strategy was hinged on seven identified wonders to entice tourists into the country and these wonders included, Victoria Falls, Great Zimbabwe Monument, Hwange National Park, Matopos National Park and Monument, the Eastern Highlands, Mana Pools and Kariba (ZTA, 2011). There is no doubt that tourism in Zimbabwe is one of the economic sectors whose performance largely depends on a positive country branding. The fact that Zimbabwe as a tourism destination has rebranded itself as *Zimbabwe: A World of Wonders* is a step in the right direction. While the reasons why the two previous destination branding strategies failed is documented in the Zimbabwean tourism scholarship, though not extensively, there is a dearth of research in terms of the evaluation of the branding efforts that led to the current brand tagline of: "*Zimbabwe: A World of Wonders"*, thus, creating a worrying research gap which forms the premise of this current study.

Research shows that the nation branding theory as a topic of academic investigation is increasingly witnessing a burgeoning literature (Amujo & Otubanjo, 2012:87). The field, though considered to be a recent development in the wider tourism domain (Gnoth, 2002; Jansen, 2008; Schaar, 2013), destination branding remains a subject full of debate, controversies and arguments among both practitioners and academics

(Anholt, 2000, 2004; Olins, 2002). Despite being a growing area of academic scrutiny, limited attention has been paid to the theoretical underpinnings of rebranding negatively viewed destinations (Amujo & Otubanjo, 2012:88) like Zimbabwe. Therefore, the concern of this study is to critically assess the competitiveness and attractiveness of Zimbabwe as a tourism destination brand.

2.5.1 Performance of brand Zimbabwe

Little research has been conducted in this field especially in terms of tracking and measuring destination brand performance over time (Pike, 2005 cited in Balakrishnan, 2009:611; Volgger & Pechlaner, 2014). This is despite the acknowledgement that the industry is the second largest in the world (Balakrishnan, 2009:611). Slabbert (2013) argues that the tourism industry is the safest as it does less damage to the environment when compared to the extractive sector. WTTC (2017) notes that the tourism sector globally continues to be an important sector that contributes significantly towards global economic development and employment. In 2016, the contribution of tourism was estimated at US$2.3 trillion and more than 100 million jobs were created globally (WTTC, 2017:1). Despite this remarkable growth in the global tourism market, "competition is fierce with 194 tourist destinations clamouring for a share of the tourist's heart, mind and wallet" (Balakrishnan, 2009:611). As a result of growing competition, Africa as a continent received a paltry 29 million visitors in 2015 (WEF, 2017).

In Zimbabwe, tourism was one of the rising sectors of the economy and its contribution towards the GDP during the period 1980 to 2000 was very significant. In 2016, tourism contributed US$ 5 billion towards the GDP (WTTC, 2017:1), which translated to 3.5% of the country's total GDP. In terms of employment, WTTC (2017) notes that the tourism industry in Zimbabwe directly and indirectly supported 393 000 jobs in 2016 (5.2% of total employment) and the employment figures were expected to rise by 1.4% in 2017 to 398 500 jobs. The tourism sector in Zimbabwe received 2.1 million visitors in 2016 (Zimbabwe National Statistics Agency (ZIMSTAT), 2016:1). According to ZIMSTAT (2016: IV), the growth in tourist numbers is believed to be a clear witness of the country's improved destination image (ZIMSTAT, 2016:1; ZTA, 2013). However, though tourism figures have improved greatly since the decline in 2000 and 2008,

factors that influence Zimbabwe's competitiveness and attractiveness remains unknown.

Currently, South Africa and Mauritius are the largest tourism revenue earners on the African continent, and it is important to note that their competitive rankings stood at 53rd and 55th (WEF, 2017). These two countries have been the most competitive destinations in Sub-Saharan Africa as noted by Blanke and Chiesa (2013) cited in du Plessis *et al.* (2015). Before the land invasion in 2000, Zimbabwe was the most competitive destination in Africa (Turton & Mutambirwa, 1996). By 1998, Zimbabwe was ranked fourth among African countries in the number of tourist arrivals behind South Africa, Tunisia and Morocco. Mkono (2010) argues that as a result of the politicised and contentious land reform programme of 2000, the tourism industry was greatly affected.

The contested land reform programme caused dwindling tourism numbers, which greatly affected occupancies in hotels. The destination deteriorated into a prolonged turmoil fuelled by a bolt of travel warnings from Zimbabwe's traditional and well spending source markets such as Japan, the United States of America (USA), Germany and Britain (Mkono, 2010). The travel warnings were a response to the political and economic crises triggered by the worsening diplomatic relations between Harare, London and Washington DC. In addition to this, several airlines pulled out of Harare as the situation further deteriorated.

Zimbabwe saw a further dwindling of arrivals in the year 2008 as a direct result of political chaos and instability that emanated from contested election results, human rights abuses, economic recession and a barrage of negative media publicity. During the year 2008, all indications on the ground pointed to the fact that Zimbabwe, as a tourist destination, was fast becoming one of the tragedies of modern Africa (Ndlovu *et al.,* 2009). In 2008, the government of the day failed to deal with the world-record hyperinflation that was literally running amok, creating the existence of black markets and cash shortages in the process (Ndlovu *et al.,* 2009). The shortages of foreign currency had multiplier effects on the economy and this resulted in fuel shortages, loss of consumer spending power and confidence. These situations could not help matters but just eroded the health of **Africa's Paradise** brand (Ndlovu *et al.,* 2009).

Surprisingly, the tourism sector remained the largest contributor to the GDP, even during the period when Zimbabwe was struggling (ZTA, 2011). The question that remains unanswered is what the effects are of branding on such a position.

The government has said it is committed to the growth of tourism but several efforts made to counter the negative perceptions of Zimbabwe and draw tourists in are quickly dashed by the actions of the head of state and a coterie of his top ministers. WTTC (2017) forecasts that the annual growth of tourism in the Southern Africa region should be 5.9% over the next decade, assuming appropriate policy frameworks and implementation are in place. However, the problems in Zimbabwe have undermined the tourism growth in the whole region because of the associated perception problems spilling over into neighbouring states and because of the interrelatedness of tourism initiatives in the region. The disruptions caused by the land resettlement programme delayed the launch of Gaza-Kruger-Gonarezhou Transfrontier National Park.

Following the contested presidential results in 2008, a new government of all the major political parties was formed in 2009. As a result of the new government, a lot of diplomatic relations were normalised and this was good news for Zimbabwean tourism (Woyo & Woyo, 2016). The Zimbabwean situation in the past decade has been creating a perfect storm from its political, environmental and economic meltdown issues (Ndlovu & Heath, 2013). The political and worsening economic climate affected the image of Zimbabwe as tourism destination and this eroded the equity capital of the *Africa's Paradise* brand (Ndlovu & Heath, 2013). The effect of these brand characteristics severely affected the rate of development within the travel and tourism sector, which is considered an imperative element of Zimbabwe's brand identity. Therefore, the performance of brand Zimbabwe has not been competitive and attractive for a very long time.

2.6 CONCLUSIONS

The purpose of this chapter was to review literature on destination branding. This was achieved by discussing the role of branding in building competitive and attractive destinations in the Zimbabwean tourism context. The review was done by contextualising the terms brands and destination brands. In order for destination

marketers in Zimbabwe to build a competitive and attractive destination brand, a better comprehension of what destination branding constitutes is required. More so, destination marketers are also required to have a clear understanding of the strategic importance of destination brands. This relative understanding is crucial if Zimbabwe is to be marketed as an attractive and competitive brand.

Destination branding is complex because of the overlap between service, corporate and product branding. The complexity of the destination branding is further exacerbated by the multiplicity of destination stakeholders that are involved in the process. Destination branding must go beyond the mere development of logos, slogans and strategies to include a range of competitiveness metrics. It has also been concluded that the image of the destination is a critical antecedent of tourist visitation decision-making process. More so, it was also found that destination image plays a critical role in terms of influencing the tourist's destination choice. Zimbabwe's destination image has been largely political and marketers need to understand that in their perception management strategies.

Research that focused on theoretical and empirical destination branding frameworks in Africa in general and Zimbabwe in particular is very limited. More research is therefore required in this area, especially with regard to destinations that have been negatively viewed by its markets.

The objective of the next chapter is to review and discuss literature regarding competitiveness and attractiveness in a tourism destination context. Issues regarding the measurement of these two concepts are also going to be discussed.

CHAPTER 3

DESTINATION COMPETITIVENESS AND ATTRACTIVENESS

"Over and over again, one finds books and articles on competitiveness that seems to the unwary reader to be full of convincing evidence but that strike anyone familiar with data as strangely, almost eerily inept in their handling of numbers".

Paul Krugman, 1994

3.1 INTRODUCTION

Tourism is acknowledged worldwide as a key sector and tool for economic development, employment creation as well as as wealth creation (Kovačević, Kovačević, Stankov, Dragićević & Miletić, 2017). Moreso, the tourism sector is also considered to be a significant tool that can be used to promote the image of a tourism destinaton (Dupeyras & Maccallum, 2013). Based on this, many countries around the world are increasing investments towards the tourism industry as a way of boosting their local economies (Kovačević *et al.,* 2017). The growth in tourism investments by countries globally has resulted in a growing number of competing tourism destinations.

Vanhove (2005) argues that, while the number of source markets have been constant, the number of emerging tourism destinations is on the increase. Therefore, because of this unevenness, there has been a substantial growth in terms of competition among tourism destinations on the international tourism market (Ayikoru, 2015; Du Plessis *et al.,* 2015; Kovačević *et al.,* 2017; UNWTO, 2013). Due to the amount of competition among tourism destinations internationally, the influence of competitiveness on the performance of tourism destinations on the international market is also growing daily (Ayikoru, 2015; Du Plessis *et al.,* 2015; Enright & Newton, 2004; 2005).

Dupeyras and Maccallum (2013) note that, the concept of competitiveness of tourism destinations is becoming more and more significant because of global and economic trends. Some of the trends that are increasing the significance of competitiveness include role of social media, changing market trends, and new sources of demand. Cracolici and Nijkamp (2009) argue that, as global competition in the tourism industry

increases, many destinations are therefore finding it difficult to enhance their destination attractiveness and generate loyalty among travellers.

Destination attractiveness is widely acknowledged in literature as one of the main determinants of the tourism destination's competitiveness (Cracolici & Nijkamp, 2009; Krešić & Prebežac, 2011 Omerzel Gomezelj & Mihalič, 2008; Ritchie & Crouch, 2003; Vengesayi, 2003, 2005). Therefore, for a tourism destination to achieve competitive advantage, there is need for the destination to ensure that "its overall attractiveness and the tourist experience" is superior when compared to competition (Dwyer *et al.,* 2004:91). Based on this, it is clear that "destination attractiveness, as perceived by tourists, is a central determinant of destination competitiveness and success" (Mikulić *et al.,* 2016:154; Vengesayi, 2003).

Ritchie and Crouch (2000:6) argue that, competitiveness in a tourism destination context "has tremendous ramifications for the tourism industry and is therefore of considerable interest to practitioners and policy makers". As a result, Zimbabwe's destination managers must have a comprehensive understanding of how the tourism destination can enhance and sustain its competitiveness as well as its attractiveness. More so, for Zimbabwe to succeed in a cluttered marketplace, the destination need to strategically assess and manage its competitiveness and attractiveness factors by means of comparing the destination's competitiveness and attractiveness levels with those major competitors in the region such as South Africa, Botswana and Namibia.

Chapter 2 discussed and reviewed literature on destination branding and tried to place Zimbabwe's destination branding efforts into context. The purpose of this chapter is to discuss and review literature on destination competitiveness and attractiveness in a destination context. This objective is going to be achieved through having three distinct sections. The first section discusses destination competitiveness literature. Under this section, efforts are made to operationalise competitiveness by means of defining the term. Thus, offering a contextual definition of destination competitiveness as it is often investigated in literature and practice. Origins and application of competitiveness to destination is deliberated under this section of the chapter. The main destination competitive models that have been developed by scholars within the tourism research context are also going to be discussed. The second section of the chapter discusses

and conceptualises attractiveness in terms of its origins. The definitions of attractiveness are going to be analysed as is often investigated in literature and practice. The last section of the chapter focuses on linking destination competitiveness and attractiveness as a way of bringing the study into context. Figure 3.1 provides an outline of how this particular chapter is structured.
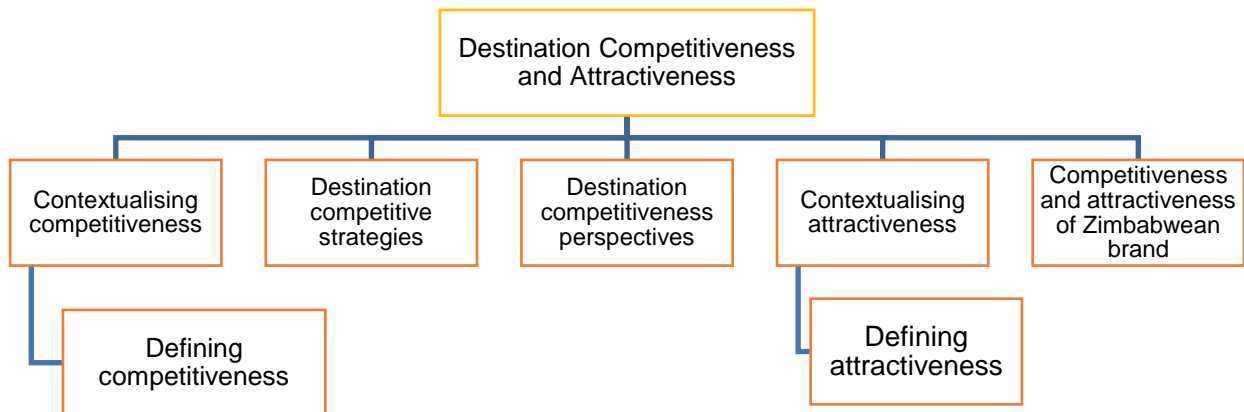
Figure 3.1: Schematic layout of Destination competitiveness and attractiveness
Source: Developed by author

3.2 OPERATIONALISING COMPETITIVENESS

Currently, competitiveness appears to be one of the most momentous subjects of research in the world. The deliberation of competition between nations has been lengthy in the economics domain. The term competitiveness gained much prominence during the late 1980s (Chaudhuri & Ray, 1997). It continues to be an imperative issue in terms of enlightening macro-economic policy and business in every country (Camison & Fores, 2015:477). However, the theory of competitiveness has been extensively contested upon and investigated, most conspicuously in competition between firms. Competitiveness has also been extensively applied within the framework of nations (see, Crouch, 2007; Du Plessis *et al.,* 2015; Hong, 2009; Mazanec *et al.,* 2007; Porter, 1990, 2004, 2009). However, economists, particularly Krugman (1996) have been critical of the obsession researchers have gained on the notion of competitiveness. The concept of competitiveness is a characteristic of organisations, not cities, regions or countries (Krugman, 1996). While this claim can be disputed, the use of the concept in a cross-disciplinary effort between countries and firms has led to a better understanding of the concept.

Despite many years of existence and rigorous research, the term competitiveness continued to be elusive, subtle and ambiguous (Abreu-Novais, Ruhanen & Arcodia, 2018; Azzopardi & Nash, 2017; Camison & Fores, 2015; Croes, 2013; Dwyer & Kim, 2001; Kim, 2012; Tsai *et al.,* 2009). More frequently than not, those who attempted to define competitiveness have left it to be inferred by readers and this further makes the term elusive. The lack of a universally accepted definition shows that competitiveness is a complex, multidimensional and relative concept (Abreu-Novais *et al.,* 2018; Azzopardi & Nash, 2017; Azzopardi, 2011; Botti & Peypoch, 2013; Camison & Fores, 2015; Cetindamar & Kilitcioglu, 2013; Mazanec *et al.,* 2007).

The aim of this section of the chapter is to provide an overview of competitiveness as a concept and place it correctly within the confines of this present study. A discussion of what constitutes competitiveness is imperative in acquainting the anticipated audience with the topic. The review of knowledge on the topic also helped in the design of a suitable context-specific framework that Zimbabwean tourism may use in assessing its competitiveness and attractiveness from a destination branding perspective.

Competitiveness is increasingly becoming a central preoccupation in both advanced marketing economies and developing countries due to globalisation (Porter, 2004). Despite being widely acknowledged, the term has remained vague and often misunderstood by both scholars and practitioners (Abreu-Novais *et al.,* 2018:324). The aim of this part of the study is to momentarily define competitiveness and destination competitiveness concepts. It will also articulate the way they are going to be applied throughout this study and form part of the study's research agenda. The concepts of competitiveness will be discussed below as an attempt to derive a suitable definition of destination competitiveness as it is often investigated in literature and practice.

3.2.1 Defining competitiveness

The term competitiveness, even after many years of existence and rigorous empirical research, has continued to be indefinable, vague, and ambiguous (Abreu-Novais *et al.,* 2018; Camison & Fores, 2015; Croes, 2011, 2013; Kim, 2012; Tsai *et al.,* 2009). Some scholars deliberate and argue that trying to define competitiveness is a research

problem in itself, as is measuring competitiveness (Jones & Teece, 1988; Kerttels, 2016). There is no direct bearing between competitiveness and economic performance indicators and it therefore defies efforts at direct measurement.

Existing studies on competitiveness show diverse perspectives and methodologies with regard to the way it is defined, understood and measured (Abreu-Novais *et al.,* 2018; Krugman, 1996; Lall, 2001). This has contributed towards the cumbersomeness of defining the term (Cracolici & Nijkamp, 2009; Li, Song Cao & Wu, 2013). The problem of failing to come up with a universal definition of competitiveness emanates from the idea that scholars have tried to explain using different methodologies and outputs. Diverse approaches have been used to examine competitiveness (Abreu-Novais *et al.,* 2018:325; Heath, 2003; Wint, 2003). One school of thought is somewhat comfortable approaching competitiveness in the context of national economies (for instance,Croes & Kubickova, 2013; Croes, 2011, 2013; Crouch, 2007; Hong, 2009; Mazanec *et al.,* 2007; Nijkamp, 2009; Porter, 1990), while the economist school of thought has questioned the applicability of the term within a national economy context (see Krugman, 1996). It appears that these conflicting and competing ideologies are going to have a lifelong influence on the discussion within the broader tourism research about competitiveness.

The Webster's English Dictionary says the word "competitiveness" originates from the Latin word "*competer*" which means "involvement in a business rivalry for markets" (Webster's English Dictionary, 2009). In business terms, competitiveness largely means the ability and capability of a firm to compete. Hong (2008) argues that competitiveness is at the heart of business competition. The meanings of the term, however, are quite divergent and it seems reconciliation toward the same is far from being reached.

Competitiveness and competition lie at the heart of business strategy development. Its definition is often ambiguous and as a result does not lend itself to a measurement process (Abreu-Novais *et al.,* 2018; Camison & Fores, 2015; Jones & Teece, 1988; Tsai *et al.,* 2009; Wint, 2003). Within the business and economics domain, competitiveness of business organisations is largely contingent on a number of factors, which in many instances and cases are correlated, thus making it impossible

to assess them in isolation. However, the focus of the definition of the term has been very diverse and dissimilar in many instances with some authors discussing competitiveness from the productivity perspectives (Cetindamar & Kilitcioglu, 2013; Chikan, 2008; Porter, 2004), while other scholars have maintained that competitiveness is the aptitude to perform when the business environment is not favourable in a way that is quicker than competitors (Feurer & Chaharbaghi, 1994; Johnson, 1992; Scot, 1989). Pace and Stephan (1996) also argue that competitiveness is the capability of a business to make effective use of the resources at its disposal while protecting its investments. Porter (1980, 2004) argues that competitiveness is concerned with the ability of an organisation to produce something of value. In addition to this, Porter (1985) notes that competitive organisations are capable of defending their marker position over a period of time.

A multiplicity of the main elements of competition has been advanced in literature. This has continued the vagueness of the term competitiveness. In a country context, competitiveness measures the ability of creating, producing and distributing goods and services at a profit (Scott & Lodge, 1985). Newall (1992) argues that competitive countries and organisations are able to produce more quality products that can be marketed successfully both in local and international markets. However, the concept of competitiveness appears to be relative and not absolute, as it tends to rely on the value perceptions of customers and shareholders (Fuerer & Chaharbaghi, 1994). Thus, it is clear that there are some fundamental discrepancies on the definitions of competitiveness. These discrepancies emanate from the fact that the concept of competitiveness has been approached from numerous perspectives using different methodologies (Abreu-Novais *et al.,* 2018; Chaudhuri & Ray, 1997). Though there is a large volume of literature on the subject (Abreu-Novais *et al.,* 2018:324), there seems to be a dearth of systematic reviews of the extant literature.

3.2.2 Defining destination competitiveness

According to Porter (1990), the application of competitiveness to social, economic and political units has attracted a growing number of academics' and policy makers' attention. Hong (2008) argues that competition is an important concept in economic theory. As a result, many explanations have been given to justify why some firms, regions, countries and even continents are more competitive when compared with

others (Eatwell, Milgate & Newman, 1987). According to Feurer and Chaharbaghi (1994), however, the explanations that have been advanced to explain this variation in competitiveness, have been contradictory and inconsistent in nature. This further exacerbates the challenges of coming up with a universally accepted definition of competitiveness as a concept.

Destination competitiveness is defined by d'Hauteserre (2000:23), "as the ability of a tourism destination to maintain its market position and share and/or improve upon them through time". The concept of destination competitiveness is further defined as "the destination's ability to create and integrate value-added products that sustain its resources while maintaining the market position relative to competition" (Hassan, 2000:239). Dupeyras and MacCallum (2013:7) define the same concept as "the ability of the place to optimise its attractiveness for residents and non-residents, to deliver quality, innovative and attractive tourism services to consumers and to gain market shares on the domestic and global market places, while ensuring that the available resources supporting tourism are used efficiently and in a sustainable way". It is clear that the emphasis of these definitions is that competitiveness in a destination context must be able to reflect a growing market share, which must be maintained over a period of time (Dupeyras & MacCallum, 2013:7; Hassan, 2000:239; Perles-Ribes *et al.,* 2014).

The concept of destination competitiveness constitutes a tourism destination's ability to satisfactorily meet the needs of the visitors with respect to tourist experiences and delivery of goods and services better than the competition (Dwyer & Kim, 2003). The same concept has also been described by comparing prices using movements in exchange rates, productivity of the tourism industry as well as other qualitative factors that have the ability to determine attractiveness of a destination (Dwyer *et al.,* 2010). Others believe that competitive destinations are those able to create well-being of their citizens in the long term (Bahar & Kozak, 2007; Boley & Perdue, 2012).

According to Buhalis (2000), destination competitiveness refers to "the effort and achievement of long-term profitability, above average of a particular industry within which they operate as well as above alternative investment opportunities in other industries". Hong (2008) defines destination competitiveness as "the competitive

position (with high profits and constant growth) of the tourism industry of a nation relative to the global market for tourist industries in other nations, whether developed or developing countries, which therefore increases real income and standard of living of its citizens".

Research shows that scholars have followed different approaches in defining destination competitiveness. Destination competitiveness has been defined in terms of improved quality of the life of destination residents (Boley & Perdue, 2012; Buhalis, 2000). The approach of defining destination competitiveness in this manner has only been found to be more appropriate to mature international-level destinations. Therefore, it becomes more prudent to assess the competitiveness of tourism destinations by means of evaluating the economic well-being of residents since tourism destinations are engaged in international tourism (Crouch & Ritchie, 1999, 2000; Dwyer & Kim, 2003; Heath, 2003 cited in Tsai *et al.,* 2009).

Ritchie and Crouch (2003:2) define destination competitiveness as "the ability to increase tourism expenditure, to increasingly attract visitors while providing them with satisfying, memorable experiences and to do so in a profitable way while enhancing the well-being of the destination's residents and preserving the natural capital of the destination for future generations". This is the most complete definition that has been developed in tourism literature. For the purposes of this study, destination competitiveness has been approached from both subjective and objective measured variables. The objective measures that were employed in this study include, though are not limited to tourism revenue, market share, employment, value addition, visitor numbers, length of stay and so onwhile the subjective measures include cultural attractiveness among others.

Table 3.1 shows the summary of destination competitiveness definitions reviewed.

Table 3.1: Summarised review of definitions of destination competitiveness

Author(s)	Focus	Measure of competitiveness
Porter (1990, 2004)	Productivity	High standards of living; Rising standards of living
Krugman (1996)	International competition	Goods and services that meet international competition; Rising standards of living; Sustainable standards of living
Buhalis (2000)	Long-term profitability	Above average profits; Investment opportunities in other industries
Ritchie and Crouch (2003, 2005)	Preservation of natural capital for future generations	Increase in tourism expenditure; Increase in tourist visitors; Tourist satisfaction; Memorable tourist experiences; Enhanced destination residents' well-being; Preservation of natural capital
Dwyer *et al.* (2000)	Price competitiveness	Maintain real income of destination citizens; increase in real income of destination citizens; increase in standard of living of the destination
D'Hauteserre (2000)	Market position and market share	Improvement in market position; maintain market share
Hassan (2000)	Sustainability	Value-added goods; maintain market share; sustainability of destination resources
Dwyer and Kim (2003)	Delivery of tourism experience	Meeting of visitors needs; deliver quality goods and services
WEF (2013:4)	Country productivity	Effective policies; productivity
Dupeyras & MacCallum (2013)	Attractiveness of destination to residents & non-residents	Innovation; quality; value for money; market share; sustainability

Source: Developed by author

According to Table 3.1, the majority of researchers agree that the overall goal of destination competitiveness is to enhance the standard of living for the residents of the tourism destination. Definitions discussed above have certain aspects that measure competitiveness in a tourism destination context. These aspects are therefore regarded as the most significant aspects that a destination requires to be

regarded as competitive and were therefore included in the supply survey of the study. As a tourism destination, Zimbabwe must, therefore, focus on increasing tourism expenditure, identifying the right market segments; develop tourism products that are capable of meeting the expectations of the tourists, enhance the standard of living of the destination's residents; and the use of tourism resources must be sustainable for future generations.

The next section discusses destination competitiveness metrics.

3.2.3 Destination competitiveness metrics

The growing number of publications in the area of destination competitiveness reflects an increased interest by academics on the subject (Abreu-Novais *et al.,* 2018:324; Villa, Darcy & Gonzalez, 2015:263; Zehrer, Smeral & Hallmann, 2017:55). Accordingly, variables that are associated with the measurement of destination competitiveness have also grown. The metrics that have been advanced in literature to measure the performance of destination brands in relation to competitiveness include objective (Zehrer *et al.,* 2017:55) and subjective measures (Heath, 2003).

Objective measures of competitiveness include visitor numbers (Crouch *et al.,* 1992; Hassan, 2000; Heath, 2003; Kulendran & Dwyer, 2009), market share (Heath, 2003; Perles-Ribes, Ramon-Rodriguez & Sevilla-Jimenez, 2014), tourist expenditure and employment growth (Deskins & Seevers, 2011; Heath, 2003), DMO technical efficiency (Medina, Gomez & Marrero, 2012; Pestana *et al.,* 2011; Pike & Page, 2014), value added by the tourism industry (Dwyer & Kim, 2003; Heath, 2003), length of stay (Barros & Machado, 2010; Gokovali, Bahar & Kozak, 2006; Fakeye & Crompton, 1991; Martinez-Garcia & Raya, 2008; Pike & Page, 2014;); and visitor spending (Aquilo-Perez & Sampol, 2000).

Subjective measures of destination competitiveness as culture and heritage, as well as the quality of the tourism experience are also documented (Heath, 2003). Table 3.2 below shows summarised destination competitiveness metrics:

Table 3.2: Summarised destination competitiveness metrics

Destination competitiveness Metrics	Author(s)
Competitive prices	Dioko & Whitfield, 2015; Du Plessis & Saayman, 2017; Du Plessis *et al.,* 2015.
Tourist arrivals	Assaker, Esposito, Vinzi & O'Connor, 2011; Crouch *et al.,* 1992; Hassan, 2000; Heath, 2003;Kulendran & Dwyer, 2009; Pike & Page, 2014; Ritchie & Crouch, 2003.
Ratio of DMO spending and spending by visitors	Pike & Page, 2014; Kulendran & Dwyer, 2009; Hassan, 2000; Dwyer *et al.,* 2000; Buhalis, 2000; Crouch *et al.,* 1992.
Visitor spending	Aquilo-Perez & Sampol, 2000; Assaker et al., 2011; Crouch et al., 1992; Heath, 2003; Kulendran & Dwyer, 2009; Ritchie & Crouch, 2003.
Tourism expenditure and employment growth	Assaker *et al.,* 2011; Deskins & Seevers, 2011; Heath, 2003; Ritchie & Crouch, 2003.
DMO technical efficiency	Medina, Gomez & Marrero, 2012; Pestana *et al.,* 2011; Pike & Page, 2014.
Length of stay	Barros & Machado, 2010; Gokovali, Bahar & Kozak, 2006; Fakeye & Crompton, 1991; Martinez-Garcia & Raya, 2008; Pike & Page, 2014.
Internet and websites	Giannopoulos & Mavragani, 2011; Li & Wang, 2011; Vrana & Zafiropolous, 2011.
Public sector infrastructure	Spencer & Holecek, 2007.
Value added goods and standard of living	Assaf & Tsionas, 2015; Dwyer & Kim, 2003; Hassan, 2000; Krugman, 1996; Porter, 1990; Ritchie &Crouch, 2003
Market share	D'Hauteserre, 2000; Hassan, 2000; Heath, 2003; Perles-Ribes, Ramon-Rodriguez & Sevilla-Jimenez, 2014.
Cultural heritage	Heath, 2003.
Quality of tourism experience	Heath, 2003.

Source: Developed by author

However, there is no framework that assesses the connection between destination branding and destination competitiveness (Pike & Page, 2014:209). Research has generally been focused on tourism arrivals as the most common metric of market performance of tourism destinations (Pike & Page, 2014). Though the effectiveness of

the marketing strategy is one of the performance metrics that tourism destinations can use (Pike & Page, 2014), it remains an under researched measure of destination performance. Visitor metrics provide DMOs with a sense of answerability with regard to money invested in marketing and branding tourism destinations. However, it remains unknown whether visitors' travel intentions are entirely influenced by destination branding (Pike & Page, 2014:211).

It is imperative to note that, in spite of the noticeable flaws of the cause-effect relationship that exists between destination competitiveness dimensions, it is not possible to determine the effectiveness of marketing spending using arrivals in a tourism destination alone (Pike & Page, 2014; Tasci & Denizci, 2009). Research that has focused on measuring the ratio of spending between DMOs and visitors was done, albeit with fewer researchers (see Crouch, Schultz & Valerio, 1992; Kulendrana & Dwyer, 2009). Therefore, the idea of developing competitive and attractive destination brands puts destination marketing and branding under the spotlight (Tasci & Denizci, 2009). The returns of destination branding are yet to be assessed in the context of competitiveness and attractiveness in the wider tourism literature despite the ever-growing marketing budgets.

Length of stay by overnight international travellers can also be used to evaluate the competitiveness of tourism destinations (Barros & Machado, 2010; Gokovali, Bahar & Kozak, 2006; Martinez-Garcia & Raya, 2008). However, it seems there is not so much academic research that has gone into length of stay as a crucial element in explaining destination competitiveness. Despite the many efforts and discussions made by scholars on competitiveness within the general competition literature to date, they have not been ample to address the distinct considerations that are relevant and imperative when it comes to the determination of destination competitiveness (Dwyer & Kim, 2003; Pike & Page, 2014:213).

Abreu-Novais *et al.* (2018:325) argue that, as a result of the absence of a universal definition of destination competitiveness, its measurement is still contested. Despite the lack of a universal definition, multiple approaches that have been used in measuring destination competitiveness have produced more conflicting answers with regard to what is measured; how it is measured and who measures destination

competitiveness (Abreu-Novais, Ruhanen & Arcodia, 2015). It is clear that researchers who have attempted to measure destination competitiveness are largely inhibited by the disputes and inconsistencies that form the basis of the term's conceptualisation (Abreu-Novais *et al.,* 2018).

Empirical attempts to identify and assess destination competitiveness remain constrained by the debates and contradictions in conceptualising the term. Furthermore, although academic discourse on the topic broadly acknowledges the multiplicity of existing views (Abreu Abreu-Novais, Ruhanen & Arcodia, 2015; Mazanec *et al.*, 2007; Zehrer, Smeral & Hallmann, 2017), it has yet to 'take stock' and explore these variations and relationships in understanding the concept. Arguably any further investigation of destination competitiveness should be informed by a more thorough understanding of the conceptualisations of the term from those stakeholders who are responsible for operationalising the concept in practice; that is, supply-side stakeholders including government, business owners, associations and local residents, as well as tourists whose perspectives have long been recognised as important in any attempts to measure competitiveness.

The next section discusses and analyses literature on destination competitive strategies.

3.3 DESTINATION COMPETITIVE STRATEGIES

Porter's (1985) framework is the finest approach that firms and industry can use to gain a competitive advantage. Generic strategies by Porter remain the most widely used strategic frameworks of strategic options in business organisations. These strategies include cost leadership, differentiation and focus. Generic strategies have dominated corporate competitive strategies literature for the past three decades (Pretorius, 2008). Thus, the key determinants of how to compete for a firm will be premised on the type of its competitive advantage and the target market it is serving.

Within the destination management literature, the destination's position in the market is an important component in destination marketing because destinations are easier to substitute (Ayikoru, 2015:142). Destinations are, therefore, supposed to adopt these

competitive strategies as prescribed by Porter (1985). The fact that competition within the global tourism market is becoming rife (see for example, Adenyinka-Ojo *et al.,* 2014; Assaker *et al.,* 2013; Balakrishnan, 2008; 2009; Du Plessis *et al.,* 2015; Tasci, 2011; UNWTO, 2011, 2012, 2013) does not leave destinations with much choice, save the adoption of the generic competitive strategies as a response to the growing competition between destinations. Table 3.3 below depicts Porter's generic strategies that destinations can use as leverage for competitive advantage.

Table 3.3 Generic Strategies

Target/Market Scope	Advantage	
	Low Cost	Product/Service Uniqueness
Broad (Industry Wide)	Cost Leadership Strategy	Differentiation Strategy
Narrow (Market Segment)	Focus Strategy (low cost)	Focus Strategy (differentiation)

Source: Adapted from Porter (1985)

3.3.1 Cost leadership strategy

Competitive advantage in tourism destinations relates to how a tourism destination positions itself in the market. According to Porter (1985), a firm can competitively position itself in the market in two ways: by lowering costs and by differentiation. The cost leadership strategy entails doing business at the lowest possible cost while being able to manage the organisation's value activities. In a tourism context, cost leadership strategy would mean the ability of a tourism destination to lower its costs in the delivery of the tourism product. This must be done more efficiently and effectively than the competition. Overall, cost leadership in a tourism context means the destination has cheaper tourism products when compared to other competing sets of tourism destinations (Boley & Perdue, 2012). It is, therefore, clear that a cost leadership strategy is beneficial for tourism destinations in attracting more travellers from nearby

source markets. However, research has shown that following cost leadership in the tourism industry is not a sustainable strategy (Boley & Perdue, 2012; Buhalis, 2000).

3.3.2 Differentiation strategy

Differentiation denotes a situation whereby one seller is able to provide customers with products that have unique value and features. A differentiation strategy, therefore, is one that is capable of influencing buyers that a product is unique in some way to other products from the competition. Porter (1985) argues that through a differentiation strategy, firms are able to produce value based on how unique the product is. This could, however, be achieved by means of superior customer service, innovation, creative marketing, and excellent supply chain relationships.

The differentiation strategy often leads to better services. Applying the concept of differentiation to the tourism industry, the strategy focuses on underscoring the destination's unique attributes that would motivate tourists to visit the destination over other tourism destinations (Boley & Perdue, 2012). It also involves the identification and matching of the destination's attributes with the characteristics of the intended market segment, which must be able to value such attributes to warranty a motivation to visit. In addition to this, the differentiation strategy could be seen through providing high quality services at the airports, hotels, guest experiences and support sectors in a destination.

3.3.3 Focus strategy

Porter (1985) argues that focus strategy is based upon serving neglected segments of the market as compared to the whole market. It is argued that firms that pursue this generic strategy must be able to identify their target market segments, determine the market's needs and satisfy them better than their competitors. It can be either a cost-focus or a differentiation focus strategy. Evans, Campbell, and Stonehouse (2006) argue that the focus strategies can be developed in tourism through a variety of ways that include focussing on a particular group of buyers; specialising in a particular geographic destination; and catering the benefits sought by a particular group of tourists. This generic strategy works well when the destination in question is able to identify the niche market segment that matches its destination capabilities and

residents' personalities (Boley & Perdue, 2012). Destination competitiveness research shows that it has either embraced differentiation or focus strategies by focusing on the identification of tourism destinations' attributes which must be matched with the markets the destination is targeting (Boley & Perdue, 2012).

The following destination competitiveness models presented in this discourse tend to build upon this perspective.

3.4 DESTINATION COMPETITIVENESS APPROACHES

The progressively competitive world of the tourism market has made it very demanding to sustain competitiveness for many destinations across the globe. This is further compounded by the fact that the tourism market is a multidimensional one that requires that the competitiveness of the industry be examined from many different approaches and perspectives. Tourism destination competitiveness research has shown that the field of tourism is a "special case in terms of trade in services and therefore requires a special treatment in relation to competitiveness analysis" (Azzopardi & Nash, 2013:222; Kim, 2012:222). This study, therefore, draws upon well-established conceptual backgrounds in critically assessing brand Zimbabwe's competitiveness and attractiveness as a tourism destination. Destination competitiveness has been regarded as the "tourism holy grail" (Ritchie & Crouch, 2000). Consequently, it is important to note that research interest on competitiveness has grown rapidly as suggested by a corresponding increase of literature in the domain (Villa *et al.,* 2015:263). Notwithstanding the geometric growth of destination competitiveness research in recent years, research that critically assesses destination brands in relation to competitiveness and attractiveness has been limited.

The success of organisations and economies is based on how competitive they are (Camison & Fores, 2015; Krugman, 1996; Porter, 1990, 2012). Price competitiveness has been the dominant focus of discussion in destination competitiveness research (see Dioko & Whitfield, 2015; Du Plessis *et al.,* 2015; Du Plessis & Saayman, 2017; Dwyer *et al.,* 2009). However, research has only recently started moving towards non-price related factors. In research, destination competitiveness has been defined a number of times using objective outcomes such as profits, success and market share.

The more market share, tourist arrivals, spending tourists, profits and successful a tourism destination is when compared to competition, the more it is deemed to be competitive (Ayikoru, 2015; Chen, 2008; Craigwell, 2007; Du Plessis *et al.,* 2015; Dwyer *et al.,* 2003; Enright & Newton, 2004; Hassan, 2000; Kozak & Rimmington, 1999; Miller, Henthorne & George, 2008; Perles-Ribes, Ramon-Rodriguez & Sevilla-Jimenez, 2014 Pike *et al.,* 2010; Sahli, 2006). More specifically, it appears that destination competitiveness is linked to more tourist arrivals and growing destination income (Croes, 2011; Poon, 1993). Therefore, there is consensus in research that more is better and competitive (Poon, 1993). However, this current study argues that destination competitiveness assessment should go beyond visitor numbers and destination income by integrating other strategic measures that are critical and pertinent to destination brands.

Table 3.4 exhibits some of the approaches to date by a number of scholars as they try to dissect the key issues around the complexity of the competitive tourist destinations. Key research issues and themes on this domain addressed sustainable competitiveness (Boley & Perdue, 2012; Ritchie & Crouch, 2010; Whitfield & Dioko, 2014); destination positioning (Chacko, 1998; Ndlovu, 2009; Prayag, 2007); destination management systems (Baker, Hayzelden & Sussmann, 1996; Buhalis & Wagner, 2013; Fuchs & Weiermair, 2004); strategic management (Evan, 2002); price competitiveness (Dwyer *et al.,* 2000, 2001, 2002; Dwyer & Kim, 2003; Dwyer & Forsyth, 2011; Dioko & Whitfield, 2015; Du Plessis *et al.,* 2015; Du Plessis & Saayman, 2017; Forsyth & Dwyer, 2009); managed destinations (d'Hauteserre, 2000); destination products and the implications they have on travellers' perceptions (Murphy *et al.,* 2000; Prayag, 2010); destination development and the role of transport (Prideaux, 2000); management of destination environment (Boley & Perdue, 2012; Cracolici *et al.,* 2008; Hassan, 2000; Whitfield & Dioko, 2014); quality management (Assaf & Josiasen, 2012; Assaf & Tsionas, 2015; Boley & Perdue, 2012; Eraqi, 2005; Vajcnerova, Ziaran, Ryglova & Andrasko, 2014); destination competitiveness and quality of life (Assaf & Tsionas, 2015; Boley & Perdue, 2012); regional position (Adenyinka-Ojo *et al.,* 2014; Pike, 2009; Uysal *et al.,* 2000); destination governance (Beritelli, Bieger & Laesser, 2007; Volgger & Pechlaner, 2014); market share as a destination competitiveness measure (Perles-Ribes *et al.,* 2014); what makes

destinations competitive (Du Plessis *et al.,* 2015); and destination competitiveness challenges (Ayikoru, 2015).

Table 3.4: Summarised destination competitiveness approaches

Approaches	Author(s)
Sustainable competitiveness	Assaker *et al.,* 2011; Boley & Perdue, 2012; Ritchie & Crouch, 2000; Whitfield & Dioko, 2014.
Price competitiveness	Andreas-Caldito *et al.,* 2013, Dioko & Whitfield, 2015; Du Plessis & Saayman, 2017; Dwyer & Forsyth, 2011; Dwyer *et al.* 2000
Managed destinations	d'Hauteserre, 2000.
Competition and Competitive destinations	Assaf & Tsionas, 2015; Buhalis, 2000; Du Plessis *et al.,* 2015; Kim *et al.*, 2000
Destination products and travellers' perceptions	Murphy, Pritchard & Smith, 2000; Prayag, 2010.
Importance of transport in destination development	Assaf & Tsionas, 2015; Prideaux, 2000; Spencer & Holecek, 2007
Environmental management	Ashworth & Page, 2011; Assaf & Josiasen, 2012; Assaf & Tsionas, 2015; Barros & Dieke, 2008; Boley & Perdue, 2012; Cracolici *et al.*, 2008; Hassan, 2000; Mangion, Durbarry & Sinclair, 2005; Mazanec *et al.,* 2007; Mihalic, 2000, 2013; Mihalic, 2013
Quality management	Assaf & Josiasen, 2012; Assaf & Tsionas, 2015; Barros & Dieke, 2008; Boley & Perdue, 2012; Eraqi, 2005; Go & Govers, 2000; Vajcnerova, Ziaran, Ryglova & Andrasko, 2014
Positioning	Adenyinka-Ojo *et al.,* 2014 Pike, 2009; Uysal *et al.,* 2000
Destination competitiveness and governance	Beritelli, Bieger & Laesser, 2007; Volgger & Pechlaner, 2014.
Destination competitiveness challenges	Ayikoru, 2015.
Disability tourism market	Villa, Darcy & Gonzalez, 2015.

Source: Developed by author

The dominant approaches to destination competitiveness are discussed as follows:

3.4.1. Public administration approach

It must be noted that destination competitiveness has also been debated under the banner of the roles played by public administration in relation to competitiveness of tourist destinations (see Bueno, 1999; Pechlaner, 1999). More recently, others have tried to delve into the analysis of health and hygiene as a way of improving tourism sector competitiveness (Jovanovic, Jankovic-Milic & Ilic, 2015). Destination competitiveness continues to be complex with no universally accepted approach in sight despite the rigorous research to date. This might have been necessitated by a lack of a universally accepted definition of destination competitiveness among scholars and practitioners, thus further compounding the complexity of destination branding research.

3.4.2 Price competitiveness approach

The competitiveness of a destination is judged on the basis of perceptions tourists have on its prices (Du Plessis & Saayman, 2017; Dwyer & Forsyth, 2011; Whitfield & Dioko, 2015). The most comprehensive seminal work on price competitiveness has been done by Dwyer *et al.* (2000, 2001, and 2002) in Australia. This work investigated the competitiveness of price in 19 tourism destinations between 1985 and 1998 (Andreas-Caldito *et al.*, 2013). In doing so, indices were developed as a way of comparing international price competitiveness. Travelling costs and ground costs were used as the two major prices in determining competiveness of Australia as a destination (Dwyer *et al.,* 2000). In their findings, Dwyer *et al.* (2000) note that the price competitiveness of tourism destinations is varied, depending on where the tourist originates. As part of their contribution to literature, Dwyer *et al.* (2000) constructed tourism price indices that can be used to evaluate destination competitiveness. The indices included the movements of exchange rates and price changes among other determinants (Dwyer & Forsyth, 2011).

Price is an important destination competitiveness dimension especially in the development of a competitiveness and attractiveness assessment framework of a tourism destination. However, the measurement of destination competitiveness done

by Dwyer *et al. (*2000) has no evidence of being empirically tested in destinations using other nations' currencies, such as Zimbabwe. Currently, Zimbabwe's currency basket includes the South African Rand (ZAR), the US dollar (USD), British Pound (GBP), Japanese Yen, Chinese Yuan, Botswana Pula and more recently the Bond Notes that were introduced in November 2016. It becomes prudent for this study to empirically assess the effect of the multicurrency regime in Zimbabwe on destination attractiveness and competitiveness. Globally, this will be done for the first time, as there has been no literature found on this element.

Policy competition and lower prices are believed to be some of the price related factors that help tourism destinations to compete (Mangion, Durbarry & Sinclair, 2005). The comparison of pricing models used in the tourism destination and the pricing model in the tourists' source market are crucial in determining the price competitiveness of a tourism destination (Boley & Perdue, 2012; Dwyer & Forsyth, 2011). It is generally believed that this view was borrowed from Porter (1980, 1985) who argues that low costs generally place a firm in a favourable position relative to competition. It is interesting to note that research interest on price competitiveness is increasing. Despite a growing stream of academic attention on price competitiveness, only South Africa has received that kind of attention in Southern Africa (*see* Du Plessis *et al.,* 2015; Du Plessis & Saayman, 2017). Price influences the level of demand at a macro level.

Research shows that international tourists are price elastic, that is, they are more sensitive to the prices they are charged when on vacation (Forsyth & Dwyer, 2009). While previous studies have attempted to determine the competitiveness of tourist destinations by estimating price elasticity of demand and tourism demand, no study could be found that tried to place the effects of destination branding in relation to competitiveness and attractiveness of a tourist destination. The focus to date has been just on competition through lower prices with less attention on how branding affects price competitiveness and attractiveness of a tourist destination. While price competitiveness has been well researched within the context of Australia, Zimbabwe is yet to attract such interest.

3.4.3 Evironmental sustainability competitiveness approach

Tourism is an environmentally sensitive industry and scholars and practitioners are concerned with issues of sustainability. Therefore, competitiveness has also been evaluated in the context of environmental sustainability (Hassan, 2000; Mihalic, 2000, 2013). Research done by Hassan (2000) shows that destination competitiveness is influenced by four key determinants, namely: (1) comparative advantage (Boley & Perdue, 2012Miller, Henthorne & George, 2008; Porter, 2009); (2) demand orientation (Andreas-Caldito *et al.,* 2013; Boley & Perdue, 2012; Heath, 2003); (3) industry structure (Dwyer & Kim, 2010; Enright & Newton, 2005; Ritchie & Crouch, 2003); and (4) environmental commitment (Assaf & Josiasen, 2012; Assaf & Tsionas, 2015; Boley & Perdue, 2012; Mihalic, 2013). However, the major issue and chief principle of Hassan's (2000) research implies that it is crucial for tourism destinations to have a clear understanding of what determines competitiveness. This knowledge must be premised on a very good globalised perspective.

Tourists are demanding better quality and environmentally friendly products due to rising environmental attention among stakeholders. Increased competition is making environmental quality management a key factor influencing destination success currently (Assaf & Josiasen, 2013; Assaf & Tsionas, 2015; Boley & Perdue, 2012). It is generally believed among scholars and practitioners that destination quality plays a decisive function in drawing tourist outputs such as tourist arrivals and tourist receipts and expenditure (Assaf & Tsionas, 2015:58). The significance of environmental and quality destination management is well document in literature (Barros & Dieke, 2008; Mangion, Durbarry & Sinclair, 2005). The quality of the environment is also beginning to pertinently influence travel decisions (Assaf & Josiasen, 2012; Assaf & Tsionas, 2015). Literature notes that the quality of a tourist destination encompasses tourism infrastructure, human resources and service (Assaf & Tsionas, 2015:59). These variables are also used in destination competitiveness assessment. However, the model by Hassan (2000) has been criticised for failing to identify key variables often associated with the measurement of competitiveness and sustainability (Hudson, Ritchie & Timur, 2004).

3.4.4. Quality management approach to competitiveness

Integrated quality management is one approach that tourism destinations can use to achieve destination competitiveness (Assaf & Josiasen, 2012; Assaf & Tsionas, 2015; Barros & Dieke, 2008; Go & Govers, 2000; Mangion *et al.,* 2005). Tourism destinations nowadays find themselves in competitive environments (Ayikoru, 2015; Balakrishnan, 2009; Du Plessis *et al.*, 2015;) and for them to compete and increase their market share of international tourism, the importance of destination quality cannot be overemphasised given the role it plays in luring tourist arrivals and receipts (Assaf & Tsionas, 2015:58). The integrated quality perspective has been applied to seven European countries as a method to increase tourism destination competitiveness. The majority of studies were done in European and American destinations. This cannot be said of the African continent in general and Zimbabwe in particular, thus creating a gap in the literature to which this present study seeks to contribute.

3.4.5 Prosperity of residents approach to competitiveness

Tourism destination competitiveness is also examined from an economic perspective. The concept has been linked to the prosperity of the residents within the tourist destination (Boley & Perdue, 2012; Buhalis, 2000; Dwyer *et al.,* 2000; Enright & Newton, 2004; Heath, 2003; Krugman, 1996; Ritchie & Crouch, 1999, 2003). The World Economic Forum (WEF) also espouses this view as noted by Porter *et al.* (2001). In their promotion messages, countries promote themselves as places where people can live, play sports, invest and conduct their businesses (Buhalis, 2000). In this regard, the tourism industry has the propensity to foster good international relations with other countries, something Zimbabwe needs at the moment since its fallout with a number of countries in the international community. However, research that links destination branding to all these issues is still lacking.

The dominant approaches that surround destination competitiveness research are comparative advantage, strategic management and socio-cultural approaches (Dwyer & Kim, 2003). While comparative advantage is a dominant approach to competitiveness, research has not been clear enough in making the distinction between comparative and competitive advantage within the tourism context (Ritchie & Crouch, 2003). Additionally, research is yet to resolve concerns that have been raised

with regard to the need to address special considerations when it comes to tourism competitiveness (Ritchie & Crouch, 2003). Comparative and competitive advantage are relevant concepts to tourism (; Dwyer & Kim, 2003; Ritchie & Crouch, 2003). The destination's attributes such as climate, scenery, wildlife etc. constitute comparative advantage in a tourism context (Dwyer & Kim, 2010; Gomezlj & Mihalic, 2008; Lee & King, 2009; Ritchie & Crouch, 2003). The destination's created resources, though not limited to hotels, airports, roads, arts, festivals, events, human resources skills, government policy etc. constitute the destination's competitive advantage (Assaf & Tsionas, 2015; Dwyer & Kim, 2010; Enright & Newton, 2005; Ritchie & Crouch, 2003). It is clear, therefore that comparative advantage of a destination deals with tourism attributes that are naturally available to a destination whereas competitive advantage is the ability of a tourism destination to utilise its natural resources.

Aaker (1991) argues that competitive advantage is an expression of competitors and customers. Competitive advantage is, therefore, an asset that organisations leverage to stay ahead of competition (Aaker, 1991). Apart from being an asset, competitive advantage is, according to Aaker (1991), a skill that refers to the organisation's ability to undertake activities more efficiently than competitors. Therefore, in the context of tourism destinations, available tourism resources are critical in influencing its competitiveness (Boley & Perdue, 2012). However, the nature of the tourism product when compared with traditional goods and services is quite different. Therefore, the perceptions of tourists with regard to their experiences in a tourism setting play a major role in motivating repeat visitation or positive word-of-mouth (WOM) recommendations (Assaf & Tsionas, 2015:58).

Laws (1995) also believe in this view and further notes that, generally, tourists either make evaluations between attractions, service standards and facilities with those of competing tourism destinations. As a result, competitiveness must be assessed according to the destination's attributes and facilities. Other approaches to competitiveness have also involved looking at it from macro (nation) and micro (firm) levels perspectives (Dwyer & Kim, 2003; Porter, 1980; Ritchie & Crouch, 2003). Therefore, it is important to note that the concept of destination competitiveness has been varied in its conceptualisations.

3.5 DESTINATION COMPETITIVE MODELS

Crouch (2011:28) notes that interest in destination competitiveness has enthused numerous research studies. The growing interest in destination competitiveness is mirrored by the progressive increase in the amount literature available (Vila *et al.,* 2015:263). The aim of the studies, as noted by Crouch (2011:28), is to diagnose "the competitive positions of specific destinations". The destinations whose competitiveness have been evaluated include the US (Ahmed & Krohn, 1990), the Caribbean (Bolaky, 2011; Chambers, 2010; De Keyser & Vanhove, 1994), South Africa (Botha, Crompton & Kim, 2000; Du Plessis *et al.,* 2015; Du Plessis & Saayman, 2017; Heath, 2003), Australia (Dwyer *et al.,* 2003), Hong Kong (Enright & Newton, 2004), Canadian Ski resorts (Hudson, Ritchie & Timur, 2000), Australia (Faulkner *et al.*, 1999), South Korea (Dwyer & Kim, 2003; Kim *et al.,* 2001), Spain and Turkey (Andreas-Caldito, *et al.,* 2012; Kozak, 2003; Kozak & Rimmington, 1999), Las Vegas (Chon & Mayer, 1995) European cities (Mazanec, 1995; Mazanec, 2007), Mediterranean resorts (Papatheodorou, 2002), South East Asia (Pearce, 1997), Cambodia (Chen, 2008), Uganda (Ayikoru, 2015); Austria and Switzerland (Mazurek, 2014), Cuba (Miller *et al.,* 2008) and Zimbabwe (Vengesayi, 2005). This present study draws on sound recognised conceptual and theoretical backgrounds, models and frameworks in critically assessing brand Zimbabwe in relation to competitiveness and attractiveness as a tourism destination.

Due to globalisation and advances in information technologies in recent years (Ayikoru, 2015; Buhalis & Law, 2008; Dwyer *et al.,* 2009:66), competition among tourism destinations has been on the increase and destinations are spending and investing a lot of money in the tourism industry as most national governments are seeking to diversify their economies. This study notes that, while a plethora of definitions have been put forth by various scholars on what constitutes destination competitiveness, very few destination competitive models were developed to evaluate destination competitiveness (Dwyer & Kim, 2003; Hassan, 2000; Heath, 2003; Poon, 1993; Ritchie & Crouch, 2003). Of the few destination competitive models that have been developed to date, most of the models are theoretical (Vengesayi, 2003), thus putting their applicability and practicality in doubt when it comes to many tourism destinations, apart from the one that formed the premise of their development. This challenge emanates from the fact that there are too many differences that exist

between destinations' operating environments and circumstances, thus limiting their applicability. A model is defined as a conceptual tool that researchers use in understanding complex issues (Ritchie & Crouch, 2003).

There are a number of destination competitiveness models that have been developed. However, this study only discusses models developed by Poon (1993), Hassan (2000), Ritchie and Crouch (2003), Dwyer and Kim (2003), and Heath (2003). All these models provide an exhaustive list of competitiveness indicators (Azzopardi & Nash, 2017) despite the fact that they are still deficient in terms of empirical validation. Based on this, these models deserve further consideration in destination competitiveness modelling, hence their choice in this study. In this study, the models are discussed and contrasted in detail for their comprehensiveness, validity and applicability in context-specific tourism destinations such as Zimbabwe.

3.5.1 Ritchie and Crouch's destination competitiveness model

Ritchie and Crouch (1993) developed the Calgary model of tourism competitiveness. Under this model, existing competitiveness models from the management sciences appear to be applicable to tourism destination as shown in Table 3.5. The Calgary model recognises that there are five important constructs able to influence the competitiveness of the tourism destination. The model's constructs are linked with a number of destination related factors. The argument put forth by Ritchie and Crouch (1993) is that more often than not, competitiveness of tourism destinations is as a result of the appeal of the destination, hence the researchers made reference to destination attractors and deterrents. The attractors in a tourism destination include attributes such as the destination's climate, natural features, cultural characteristics, general infrastructure, social characteristics, basic services, access, tourism superstructure, transport facilities, price, economic ties, and attitudes towards tourists, social ties and uniqueness. On the other hand, the model classified security and safety issues as deterrents that might work against the destination's competitiveness (Amujo & Otubanjo, 2012).

The mechanics of the Calgary model show that emphasis was placed on the careful selection and execution of destination management programmes as part of the efforts

that have an inherent multiplier effect on destination competitiveness. The model presents no doubt about the effects of marketing efforts on the perceived image of the destination, which can be strengthened by managerial initiatives for the purposes of enhancing a competitive position.

Table 3.5: Calgary model of tourism competitiveness

Destination Appeal	Destination Management	Destination Organisation	Destination Information	Destination Efficiency
ATTRACT Destination Attractiveness DETER Destination deterrents	MANAGER Managerial Efforts MKTG Marketing Efforts	DMO Management organisation capabilities ALLIANCE Strategic Alliances	MIS Internal Management Information system RESEARCH Research	IOE Integrity of experience PROD Productivity

Source: Adapted from Ritchie and Crouch (1993)

Management organisation and strategic alliances are key determinants of competitiveness. The competitiveness of a tourism destination is also enhanced by having a functional information system that will aid the decision-making process. Information management systems are crucial in providing destination managers with pertinent information that might help them in the management of the destination's tourism products. The information systems function is an aspect of the model that is closely linked to the destination's research function. Given the ever-changing nature of the tourism market, the research enables tourism destinations to effectively deal with changes in market conditions. The efficiency of the destination is also a critical element destination managers must consider when evaluating competitiveness (Pike & Page, 2014). Efficiency has a widespread implication on productivity and the skills in a destination are therefore important in enhancing the destination's competitiveness.

The Calgary model, however, went through structural changes as the authors sought to refine certain concepts and propositions (Ritchie & Crouch, 2003). Figure 3.2 shows the current form of the refined model of destination competitiveness (Crouch, 2011). The current model by Ritchie and Crouch (2003) is complex and consists of 36 destination competitiveness factors that are clustered into five major categories. The current form of the model was premised on the fundamental principles of the theories of comparative advantage, as advanced by Adam Smith in 1776 and David Ricardo in 1817, and competitive advantage (Porter, 1980, 1985, 1990); and it could be seen that they made efforts to tailor-make the model to suit distinctive characteristics of destination competition.

The destination competitiveness model developed by Ritchie and Crouch in 2003 consists of five major components. The components include supporting factors and resources such infrastructure, accessibility, hospitality, enterprise and political will (Ritchie & Crouch, 2003). The second component of the model is termed core resources and attractions. Its dimensions include, though are not limited to, culture and history, and a mix of activities. The third component of the model involves aspects of destination management while the fourth component is concerned with destination policy, planning and development. The last component of the model deals with qualifying and amplifying determinants of destination competitiveness.

The complex model in Figure 3.2 appears to be more reliable for destination marketers to use in their quest to assess the competitiveness of tourism destinations. The 2003 model gives tourism managers an outline of how a tourism destination can leverage its comparative advantage when compared with competing destinations. It also defines points in which the destination is weak and strong. Despite the assurance from Ritchie and Crouch (2003) that their model can be applied for any purpose, the application of this model is somehow limited to the current market environment. Ritchie and Crouch (2003:60) argue that models are by nature imperfect and as a result must not be used in "cookbook" fashion.

Figure 3.2: Ritchie and Crouch's destination competitiveness model
Source: Ritchie and Crouch (2003)

While it is greatly appreciated that Ritchie and Crouch (2003) made efforts to develop a conceptual model of destination competitiveness, it is important to note that the model was not specific to a particular destination or destination attributes. Paucity of research still stand out in areas where there is need to have models that can also explain the effects destination branding has on destination competitiveness and attractiveness in context-specific destinations. Additionally, those who have tried to critically review the conceptual model as proposed by Ritchie and Crouch (2003), such as Beeton (2005:294), argue that it is going to be interesting to test the model within the context of developing countries. A more recent review on the model that was done by Azzopardi and Nash (2017:249) shows that the model, though comprehensive, did not sufficiently explore tourism destination competitiveness.

Ritchie and Crouch did not satisfactorily ascertain the relationships that exist among the model's critical factors. There is no clarity as to how destination marketers integrate these factors for sustainable tourism growth and competitive advantage (Azzopardi & Nash, 2017; Jonker, Heath & du Toit, 2004). There is still a lack of empirical studies validating the model despite an increased stream of destination

competitiveness research by the same authors. Limited and/or no empirical studies have been undertaken to develop an integrative demand and supply model that is capable of identifying the effects of destination branding on competitiveness and attractiveness of a tourism destination in such a manner that all the interrelationships between all the factors can be determined. Additionally, the conceptual model of Ritchie and Crouch (2003) in Figure 3.2 has too many factors that measure competitiveness of a tourist destination. Consequently, the model becomes too definitional in showing the causation-effect correlation with no clarity in terms of operationalisation (Azzopardi & Nash, 2017:249; Hong, 2009:110; Vila *et al.,* 2015). The concern of this current study is to critically assess brand Zimbabwe in relation to competitiveness and attractiveness as a tourism destination.

The model is also criticised on the basis that tourism destinations are often affected differently (Dwyer & Kim, 2003; Enright & Newton, 2005); therefore factors affecting or contributing to competitiveness are expected to be varied. Destination competitiveness factors are also not static (Du Plessis *et al.,* 2015). Consequently, tourism destinations are supposed to customise their approach in enhancing competitiveness in the tourism industry rather than adopting a "straight jacket" as proposed in the Ritchie and Crouch (2003) model. The model also fails to explain how it will be used by tourism destinations that are at different stages of development.

3.5.2 Integrated destination competitiveness model

There has not been yet an entirely satisfactory model on destination competitiveness to date. Existing models, though complex, are yet to make provision for treating all the issues that surround the notion of competitiveness. It is important to take this into consideration when modelling destination competitiveness modes and frameworks (Dwyer & Kim, 2003; Hong, 2009). Credit is also given to Dwyer and Kim (2003) for their contribution towards destination competitiveness modelling. Their model made it possible for practitioners to compare competitiveness between countries and tourism industries. Therefore, the model was based on the national and firm perspectives of competitiveness as outlined by Porter (1980, 1985, and 1990). Main headings were applied in this model to indicate the determinants of competitiveness (Armenski *et al.,* 2011).

The model integrates elements of destination competitiveness as advanced by other key researchers (for example, Buhalis, 2000; Hassan, 2000; Heath, 2003; Mihalic, 2000; Poon, 1993; Ritchie & Crouch, 2003), hence the name integrated model. It looks like a refined model of the conceptual model proposed by Ritchie and Crouch (2003) as it encompasses a number of the variables and classification headings that were recognised by Ritchie and Crouch (2003) in their comprehensive framework of destination competitiveness (Armenski *et al.,* 2011; Azzopardi & Nash, 2017), though it differs greatly in some of the aspects of destination competitiveness. Dwyer and Kim (2003, 2010) recognise demand conditions in the market as an important influence of destination competitiveness. Azzopardi and Nash (2017:251) acknowledge the recognition of demand conditions in the Dwyer and Kim model as their greatest contribution towards destination competitiveness modelling. Unambiguously, Dwyer and Kim's model is the first one in destination competitiveness modelling to recognise the need to integrate demand issues that were completely ignored in the Crouch and Ritchie model of 2003 (Azzopardi & Nash, 2017:251).

According to the model, destination competitiveness is not the means to the policy-making end, but an intermediate goal that destinations pursue as they seek to achieve prosperity (Dwyer & Kim, 2003). This is outlined in Figure 3.3. The integrated destination competitiveness model has primary elements that include resources comprising endowed, created and supporting resources. It is imperative to note that the main factors that enhance the competitiveness of a tourism destination include destination resources and destination management. In addition to this, the model presents the destination's resources and management leading to destination competitiveness and socio-economic prosperity as shown in Figure 3.3.

As was discussed earlier in this chapter, destination competitiveness emphasises competitive advantage more than comparative advantage. Dwyer and Kim's model pushes this narrative further (Dwyer & Kim, 2003:372). However, this model has a number of notable limitations. Firstly, the model does not show where to begin. Secondly, just like the Ritchie and Crouch model, the linkages are confusing and this is exacerbated by a multiplicity of arrows leading to destination competitiveness as an outcome. Thirdly, there is no clarity with regard to the process. Fourthly, the model does not prioritise the elements that are important, for instance local communities and

service quality etc. In trying to redress the limitations of the integrated model of destination competitiveness, Hong (2009), suggests that research needs to rank and quantitatively measure the importance of the attributes.
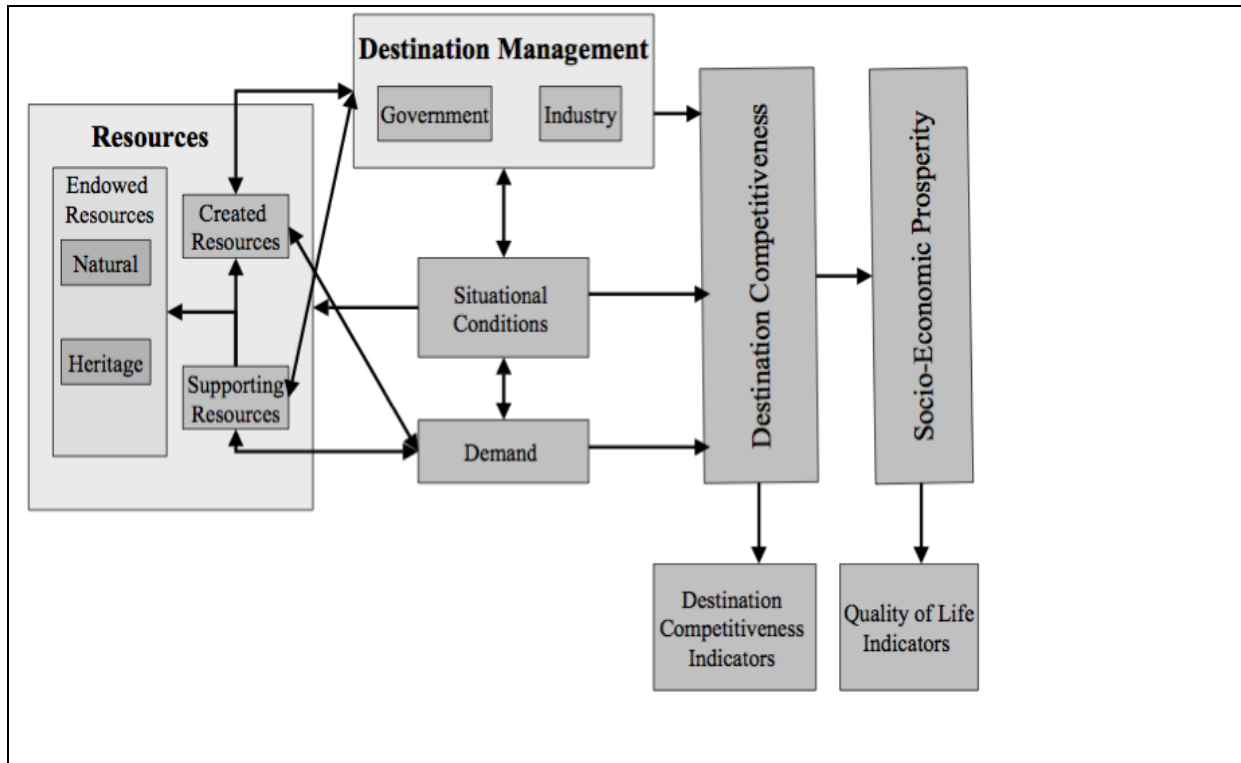
Figure 3.3: Integrated destination competitiveness model
Source: Dwyer and Kim (2003)

The attempts made with regard to testing the model presented in Figure 3.3 resulted in validity flaws and the results therefore cannot be generalised (Azzopardi & Nash, 2017:251). Additionally, it is clear that the Dwyer and Kim model has not been effective in assigning the importance of weighting to significant indicators of destination competitiveness (Azzopardi & Nash, 2017:251). Therefore, generalisations and inferences are difficult to make (Mazanec *et al.,* 2007).

3.5.3 Poon's destination competitiveness model

There is substantial literature on tourism destination competitiveness that argues that there is need to consider the destination environment as a key factor of competitiveness of a tourism destination (Ashworth & Page, 2011; Assaf & Josiasen, 2012; Assaf & Tsionas, 2015; Hassan, 2000; Mihalic, 2000, 2013; Poon, 1993). Poon (1993) suggests that there are four key strategies that a tourist destination can use in

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an attempt to achieve destination competitiveness. According to Poon (1993), the strategies are to keep the environment as a central competitiveness aspect; prioritising tourism as the economy's most important sector, developing strong distribution channels and private sector cooperation. Figure 3.4 below shows the Poon (1993) model of destination competitiveness.
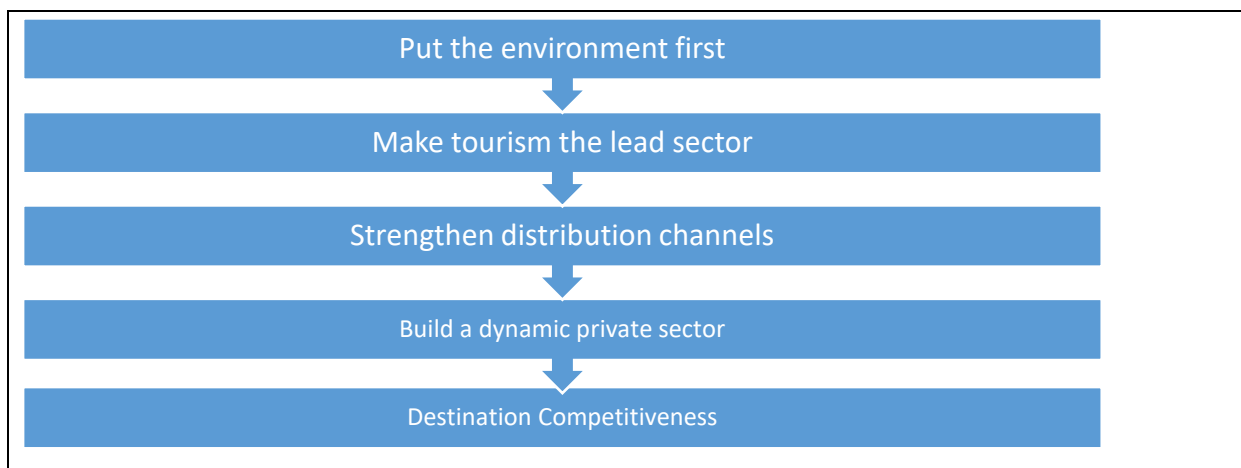
Figure 3.4: Poon's model of destination competitiveness
Source: Adapted from Poon (1993)

The tourist destination environment is a critical component that tourist destinations must consider when developing a competitive and attractive tourism industry (Assaf & Tsionas, 2015; Boley & Perdue, 2012; Hassan, 2000; Mihalic, 2000, 2013; Page, 2011; Whitfield & Dioko, 2014). Therefore, according to Poon (1993), a destination will be competitive only if the government makes policies that make the tourism sector a leading sector of the destination economy. Thus, efforts must be put in place by government to make sure that the contributions of the tourism industry to the destination's GDP are greater for it to be considered a leading sector of the economy in the tourist destination. Others have argued that even when the destination is in a place to implement effective channels of distribution, no assurance can be given of gaining destination competitiveness unless a raft of good destination management practice is implemented.

3.5.4 Hassan's destination competitiveness model

The model that was developed by Hassan (2000) focused on the sustainability of environment as an antecedent of destination competitiveness. The model identified

four determinants of destination competitiveness. The determinants were identified as demand orientation, comparative advantage, environmental commitment and industry structure as shown in Figure 3.5. The underlying conviction on which this model has been premised according to Hassan (2000:239) is that "a global perspective to understand key determinants of market competitiveness is critical for the tourism industry to sustain its growth and vitality". The tourism market is increasingly becoming saturated. Therefore, the promotion and development of brands in a tourism context have to be guided by analytical frameworks that critically focus on competitiveness as a concept.

Environmental sustainability is mentioned in tourism destination competitiveness literature as one of the major determinants that influence a tourist destination's market competitiveness (Assaf & Tsionas, 2015; Hassan, 2000; Mihalic, 2000, 2013; Whitfield & Dioko, 2014). The model by Hassan (2000) defines a destination's commitment to the environment as also one of the central features of destination market competitiveness as shown in Figure 3.5. Therefore, demand orientation, environmental commitment and comparative advantage elements are also going to be applied in the survey as a way of determining whether they influence competitiveness and attractiveness in the context of Zimbabwe.

Hassan (2000:242) affirms that, "the focus of the strategic framework hinges on the four major determinants of competiveness". Comparative advantage is identified in the model as the most important determinant of market competitiveness of a tourism destination. The destination's macro and micro environments are also critical factors that influence the market competitiveness of tourism destinations. Figure 3.5 shows that comparative advantage comes in a number of options that can include the climate, location, culture, heritage, history environmental quality of the destination, etc. as depicted by the detailed determinants of market competitiveness in Hassan's (2000) model.

Competitive destinations are able to respond to the changing conditions of the market (Hassan, 2000). The issues are embraced under demand orientation of the model and they include knowing the destination's target tourists, socio-demographic profile, and

their motivations, levels of travel experience, environmental awareness, and novelty-seeking, among a plethora of other issues.

Demand Orientation
- Who are the target tourists?
- What motivates them?
- Environmental awareness
- Levels of travel experience
- Demographic profile
- Psychographic profile
- Acceptance of local customs
- Novelty seeking

Comparative Advantage
- Climate/Location
- Culture/Heritage
- History/Artifacts
- Tourist oriented service
- Safety and health
- Nature
- Access to information
- Infrastructure
- Environmental Quality
- Leisure activities
- Global Information Network
- Global /Regional Alliances

Market Competitiveness

Industry Structure
- Industry Suppliers
  - Banks
  - Food Processors
  - Health Services
  - Cleaning Services
  - Security Services
  - Telecommunications
  - Media/Information
- Core Service Providers
  - Tour Operators
  - Hotels/Resorts
  - Cruise lines, Car rental
  - Leisure Attractions
  - Travel Agencies
  - Airlines, Public Transportation
- Stakeholders
  - Investors
  - NGO's
  - Local citizens
  - Public enterprise
  - Environmentalists

Environmental Commitment
- Tourist-oriented culture
- Stable political climate
- Environment regulations
- Tourism policy
- National image
- Environment-friendly investment policy
- Destination marketing campaign
- Facility/land use requirements
- Carrying capacity constraints
- Environmental promotion programs
- Environmental education
- Enforcement organizations

Figure 3.5: Determinants of destination competitiveness, Hassan's Model
Source: Adapted from Hassan (2000)

Hassan (2000) also asserts that the way the tourism industry within a destination is structured plays an important role in influencing the competitiveness of that particular destination. Therefore, it is clear that the ability of a destination to compete is generally based on whether the tourism industry is structured in a competitive way or not.

Bahar and Kozak (2007) argue that competitive destinations must be able to preserve natural and cultural resources in a way that enhances the welfare of the destination's residents. Environmental commitment is a key factor that influences the destination's potential to sustain market competitiveness (Assaf & Tsionas, 2015; Hassan, 2000; Mihalic, 2000, 2013). It comprises issues that deal with the tourist-oriented culture, environmental regulations, stable political climate, tourism policy, national image, and destination making campaign etc. A growing number of empirical studies have only approached the measurement of destination competitiveness from the high visitorship and market share perspectives (Cucculleli & Goffi, 2016:371). However, Croes (2010) notes that this approach has challenges as it relegate the sustainability of the destination environment. Considering this gap, this study seeks to assess the contribution of Zimbabwe's environment to its competitiveness.

3.5.5 Heath's destination competitiveness model

The destination competitiveness model that was developed by Heath (2003) is probably the only model that has been developed for an African tourism destination. Figure 3.6 shows the Heath model that was developed using a house concept to explain the key determinants of destination competitiveness. The model was motivated by the author's need to design strategies aimed at poverty reduction in the context of South Africa (Azzopardi & Nash, 2017:50). Apart from this, Heath (2003:131) argues that existing models that were not adequate in dealing with the concept of competitiveness in the context of South Africa as a tourism destination. Existing models are criticised for being inadequate and irrelevant particularly in dealing with the integration of variables that influence competitiveness. Heath (2003:131) argues that existing modelling on destination competitiveness fails to place sufficient emphasis on critical success factors such as people in the competitiveness equation. The absence of vital linkages such as communication and information management is worrying. This is the same argument that forms the basis of this current study.

The Heath model was, therefore, developed through the adoption of various factors from existing destination competitiveness models. According to Azzopardi and Nash (2017:250), the existing models that were integrated in the Heath model include Porter (1990); the Dwyer and Kim model (2003); and the Ritchie and Crouch model (2003). In a form of a house, Azzopardi and Nash (2017: 250) argue that the model is a symbol of strategic thinking in a tourism competitiveness setting. The model's foundations provide the necessary base for competitiveness. The foundations comprise key "attractors," "non-negotiables," "enablers," "value-adders," "facilitators," and "experience enhancers" (Heath, 2003). The foundation as outlined in Figure 3.6, as argued earlier is an integration of variables such as core attractor and supporting resources that are all espoused in other models that were discussed earlier in this chapter (*see* Figure 3.2 and Figure 3.3). The shared vision and leadership variables of Heath's model are similarly constructed as the destination policy of the Ritchie and Crouch model in Figure 3.2 of this study. Therefore, it is clear that people are a critical element of destination competitiveness (Azzopardi & Nash, 2017:250).

Heath's model is bound by cement, which is explained by a continuity of communication channels used in promoting the tourism destination (Heath, 2003). Tourism competitiveness is also made strong through the involvement of stakeholders. Azzopardi and Nash (2017) argue that stakeholders should own the process of building competitive destinations through their cooperation and collaboration in the strategic framework of the tourism industry. It is important to reiterate that previous branding efforts in Zimbabwe failed as a result of a direct lack of stakeholder involvement (Ndlovu & Heath, 2013). Other cement variables for the "house" model include information management in a destination context. Information management is crucial for a tourism destination's decision-making and for determining the factors that influence competitiveness (Azzopardi & Nash, 2017:251). Research and forecasting are also identified as critical "cement" variables in the model. Pike and Page (2014) argue that systematic research is crucial in building competitive destinations. Tourism success depends on having transparent communication, particularly with the stakeholders that were identified by Heath as destination competitiveness blocks (Azzopardi, 2017:251).

The house is also built using what Heath termed the building blocks. These are the elements that make tourism work in a tourism destination. The building blocks also show how integrated the Heath model is, as other blocks like destination policy and framework were also used by the Ritchie and Crouch model. This clearly suggests that efficient implementation is required for tourism success (Azzopardi & Nash, 2017:251). Heath (2003) argues that for tourism destinations to be competitive, blocks like legislative frameworks are crucial. Zimbabwean's legislative framework has been questioned after the land reform, as the country has been inconsistent with its laws (Ndlovu & Heath, 2013) although the implication of this on the destination's competitiveness is yet to be ascertained.

Destination environment is also another building block considered by Heath in the destination competitiveness model. The element of destination environment as a competitiveness factor was also included in other models such as Hassan (2000). Mihalic (2013:1) argues that, "the environment is one of the major determinants of tourism destination competitiveness planning" (Cucculleli & Goffi, 2016:171). Though the destination's environment is a crucial destination competitiveness block, the block is considerably impacted by the destination's marketing framework and implementation. Heath's model enhances other general destination competitiveness formulations by placing more emphasis on the development of quality human resources, information management, and communication (Azzopardi & Nash, 2017:251; Sparks, Perkins & Buckley, 2013).

Heath (2003) argues that the building blocks of the destination without the cohesiveness of the "cement" elements will not be able to contribute optimally contribute towards destination competitiveness. Without a strong stakeholder involvement, tourism is difficult to achieve (Azzopardi & Nash, 2017; Heath, 2003). A number of successful and mature tourism destinations including Australia, Canada, Netherlands and Singapore have increased their focus on public-private sector partnerships in their destination marketing efforts (Heath, 2003).

THE KEY SUCCESS DRIVERS
- A shared tourism vision and leadership
- Guiding values and principles
- Placing strategic priority on the "people" factor (political will, entrepreneurship, community focus and human resources development)

THE "SCRIPT" (STRATEGIC FRAMEWORK)
Enabling all tourism "actors" to play their roles optimally – towards a shared vision

THE BUILDING BLOCKS (IMPLEMENTATION FOCUS)
Synergysing and balancing development and marketing
(N.B. Implementation focus)

SUSTAINABLE DEVELOPMENT POLICY AND FRAMEWORK	STRATEGIC AND HOLISTIC DESTINATION MARKETING FRAMEWORK AND STRATEGY
- Policy and legislative framework - Organizational and financing framework - Resources and capabilities - Investment Climate - Sustainable environmental principles	- Destination image and branding - Competitive positioning - Target marketing/demand management - Innovative marketing strategies - Visitor satisfaction management

THE CEMENT
- Continuous and transparent communication channels
- Balancing direct and indirect stakeholder involvement and beneficiation
- Information management, research and forecasting
- Managing competitive indicators and benchmarks

THE FOUNDATIONS

PROVIDING AND MANAGING THE KEY ATTRACTORS
(e.g. history, culture, climate, events, entertainment, etc.)
Optimizing the comparative and competitive advantages

ADDRESSING THE FUNDAMENTAL NON-NEGOTIABLES
(e.g. personal safety and health issues)

PROVIDING THE ENABLERS
(e.g. infrastructure [airports, roads, signage, etc.], managing capacity)

CAPITALISING ON THE "VALUE-ADDERS"
(E.g. location, value, and destination linkages)

ENSURING APPROPRIATE FACILITATORS
(E.g. appropriate airline capacity, accommodation, distribution channels, etc.)

FOCUSSING ON THE EXPERIENCE ENHANCERS
(e.g. hospitality, service excellence, authentic experiences)

Figure 3.6: Heath's destination competitiveness model
Source: Adapted from Heath (2003)

Heath's (2003) model has similar weaknesses to Crouch and Ritchie's (2003) model. Azzopardi and Nash (2017:51) argue that Heath's model is unrealistic in that it portrays a linear relationship among the destination competitiveness variables. The model is yet to be empirically tested in South Africa and other tourism destinations as a way of

operationalising the destination competitiveness constructs (Azzopardi & Nash, 2017:251). The use of competitiveness in the tourism domain remains subject to controversy especially in cases where it goes beyond territorial analysis (Ivanov & Webster, 2013; Perles- Ribes *et al.,* 2014). Nevertheless, it is noted with concern that there is a general lack in universally accepted models that can be applied to tourist destinations (Azzopardi & Nash, 2017; Dwyer & Kim, 2003; Gomezelji & Mihalic, 2008; Heath, 2003). Additionally, it is also important to note that there is no generally accepted measurement of destination competitiveness (Mazanec *et al.,* 2007; Omerzel & Mihalic, 2008), hence the need to develop a destination competitiveness and attractiveness framework within the context of Zimbabwe as a tourist destination.

3.5.6 Limitations of destination competitiveness frameworks

There is a significant lack of standardisation among existing destination models and frameworks of destination competitiveness. Measuring competitiveness has not been a universal process as some researchers have used inputs, outcomes and instruments to measure the same concept. Therefore, there are a lot of conceptual and measurement problems with regard to competitiveness in a destination context. The debate on destination competitiveness is far from being over and more research is required (Azzopardi & Nash, 2017:252; Kim, 2012:222). The multiplicity of diverse conceptualisations of destination competitiveness serves little except to add to the inconsistences and deep confusions that surround the concept and its measurement (Mazanec *et al.,* 2007).

The lack of standardisation of the measuring instruments has resulted in excessively numerous factors being used to measure the concept of competitiveness in a tourism context. For instance, Crouch (2011) used 36 competitiveness items; Ritchie and Crouch (1999, 2000) used over 250 competitiveness items; Dwyer *et al.* (2000) used 83 competitiveness items. Additionally, the TCCI's measurement of competitiveness of tourism destinations uses 58 variables, while Hong (2008) discusses 68 competitiveness items. Other scholars such as Enright and Newton (2004) used 52 competitiveness variables in their measurement of the concept while Chen (2008) considered 122 items. It is clear that the lack of standardisation of the measuring items renders the existing destination competitiveness models an irksome proposition. With

more than 17 years of active research on the concept, the measuring instruments are still varied and not universally applicable to tourism destinations.

Existing models and frameworks of destination competitiveness are weak in explaining the link between the variables and indicators of destination competitiveness (Azzopardi & Nash, 2017:251; Croes, 2011). Therefore, there is a causal link gap in the literature. Despite the causal link gap that exists in destination competitiveness literature, studies have not been able to validate and provide evidence to support the advances made in terms of destination competitiveness modelling (Azzopardi & Nash, 2017:250-51; Vengesayi, 2003:644). Consequently, there is a need for research to move from simple conceptualisations to empirical validation of the proposed frameworks and models.

The existing models to date are deficient in accuracy and seem more of a nomenclature that can be used to categorise an assortment of the influences of destination competitiveness (Azzopardi & Nash, 2017; Kim, 2012; Vengesayi, 2003, 2005). Price for instance, more often than not, in the destination competitiveness literature, is inferred to be a determinant of exchange rates and labour costs, signifying that the currency of the tourism destination appreciates or matching rising labour costs would subsequently contribute to the destination losing its competitiveness. It is incomprehensible how such accepted wisdom could be practical to destinations using multiple currencies (the USD, Euro, Pound, Rand, Bond Notes and so on) like Zimbabwe, for example. Zimbabwe espoused a multicurrency regime in February 2009 after the Zimbabwean dollar was rendered worthless by galloping hyperinflation. No explanation to date has been given as to why advanced marketing economies or mature tourism destinations are able to register higher competitiveness rankings when they charge higher prices for goods and services. Destinations that are ranked in the top by WEF (2017) are expensive destinations. More detailed research needs to be on top of the destination competitiveness research agenda in this regard given that rationally, a rise in unit labour costs leads to a corresponding decline in the destination competitiveness level, hence a lower market share.

Research shows that, in the long run, the market share and the prices of goods and services exported inclusive of tourism tend to change together as put across in the

Kaldor paradox. Trade in tourism services is believed to have special characteristics (Azzopardi & Nash, 2017:251; Kim, 2012:222). Price as argued by Ritchie and Crouch (2003), however, is always losing its informative value power mainly because of the nature of trade in travel and tourism. An analysis of this view shows that there is a concealed hypothesis of cause-effect relationship that underlies the concept of destination competitiveness as a precursor of the welfare of destination citizens (Ritchie & Crouch, 2003). Ivanov and Webster (2013) also contested this. This could be the reason why scholars (*see* Azzopardi & Nash, 2017; Kim, 2012) argue for a "special treatment" in assessing destination competitiveness. The connection between satisfaction and growing tourism numbers and the welfare of destination citizens and profitability needs further research.

Literature shows that a majority of frameworks on destination competitiveness have been conceived with large countries and exhaustive destination competitiveness indicators. Despite such an exhaustive list of indicators as alluded before in this discourse, existing frameworks are still deficient in terms of their elaborations. Validating of a destination competitiveness model is yet to emerge (Azzopardi & Nash, 2017; Kim, 2012; Vengesayi, 2003) suggesting limited applicability in assessing brand Zimbabwe in relation to competitiveness and attractiveness as a tourism destination. Existing frameworks on determining destination branding makes no sense for small countries that are defined by low population and which must in actual fact be selective in their target marketing strategy. The motivation for a lack of attention is relatively unclear. Furthermore, the indices used in the existing frameworks do not clarify context-specific issues and challenges confronting these destinations. The market size and the degree to which destinations depend on tourism as well as their current economic situation is yet to be fully covered in destination competitiveness modelling. Considering these limitations and gaps there is a strong need for research to develop a destination competitiveness and attractiveness assessment framework for Zimbabwe.

Despite the limitations of destination competitiveness modelling that was discussed in this section, the following destination competitiveness aspects were deemed to be important to be included in the survey:
- Price;

- Environmental management;

- Quality management;

- Destination management;

- Tourism infrastructure;

- Economic aspects of competitiveness;

- Satisfaction;

- Investments;

- Effectiveness of branding strategy; and

- Politics and policies.

These measuring items of destination competitiveness were deemed appropriate for the study's survey because some of them have been used extensively to measure the same concept. The study also added some new measuring items like investments in branding and the effectiveness of branding strategy as a way of determining the relationship between destination branding with competitiveness in a tourism context. The choice of these factors was also motivated by the need to determine if the same factors found in literature can be applied in the empirical context of Zimbabwe.

This study assessed brand Zimbabwe using a two-pronged approach, which is the supply side and the demand side. Therefore, earlier discussions that were made in this chapter focussed on the supply side (destination competitiveness) while the next section is going to discuss the demand side approach and its measurement.

3.6 CONTEXTUALISING DESTINATION ATTRACTIVENESS

Destination attractiveness is a multidisciplinary area of study with ancestry from anthropology, sociology and psychology. Destination attractiveness is considered a fundamental concept for understanding and improving destination competitiveness (Buhalis, 2000; Crouch & Ritchie, 1999; Hu & Ritchie, 1993; Kresic, 2008; Vengesayi, 2008, 2003). The thought of destination attractiveness is fairly essential not because of its strategic link towards destination branding (Ritchie & Crouch, 2003) but because destination attractiveness plays a strategic linkage role. Destination attractiveness is the bridge that connects tourists with the destination (Formica, 2000). Formica and Uysal (2006) argue that, regardless of the importance of destination attractiveness in the destination's tourism system, a universal measurement of the concept is yet to

emerge. This demotes the theoretical and empirical appraisal of the destination attractiveness in terms of destination branding. This subdivision of this chapter endeavours to momentarily operationalise the concept of destination attractiveness with regard to the way it is going to be used as part of the study's research agenda. The concept of destination attractiveness will be discussed below as an attempt to derive a suitable definition as it is often investigated in literature and practice.

3.6.1 Defining destination attractiveness

Research into destination attractiveness within the tourism agenda has been greater than ever in recent years and cannot be regarded as a new area of examination (Buhalis, 2000; Cheng, Wu & Huang, 2013; Pompurova & Simockova, 2014; Viassone, 2012; Weaver 2012). However, the relative period of its research and discussion did not result in a synthesising examination platform but has only compounded the fragmentation of researchers' views. As such, frequent definitions have been put forth by various scholars to date.

Pearce (1979) defines destination attractiveness as the degree to which a destination is capable of meeting expectations that tourists have with regard to the destination's facilities, food, culture, natural attractions and amenities. While this definition is clear, it conversely falls short in addressing the element of prejudice that tourists have in adjudicating how attractive a destination is. Mayo and Jarvis (1981:20) define destination attractiveness as the "sum of perceived capability of a destination to deliver benefits and satisfaction to visiting tourists". According to Victor (1989), cited in Cheng *et al.* (2013:1168), attractiveness of a tourist destination is seen as the initial drive that influences tourists to choose a destination and this is greatly influenced by the interests and preferences of the tourists.

The attractiveness of a tourism destination is a significant judgement that tourists show whenever they are participating in the tourism activities of a destination (Hu & Wall, 2005). This allows the general public to be entertained, interested and educated among others (Hu & Wall, 2005; Leask, 2010). Kresic (2008:1813) defines the concept of destination attractiveness as "those attributes of a tourism destination, which with their specific features, attract or motivate tourists to visit". In addition to this view,

destination attractiveness is defined by Cho (2008:221) as "an aggregate indicator of attributes that make a specific location appealing as a potential destination to travellers". However, attributes that enhance destination attractiveness are varied and diverse. Among these are the price of venues, transport, climate, destination image and the quality of accommodation (Anholt, 2010; Assaf & Tsionas, 2015; Cho, 2008; Kim & Perdue, 2011).

Destination attractiveness is also defined by Hu and Ritchie (1993:25) as "the feelings, beliefs, and opinions that an individual has about the destination's perceived ability to provide satisfaction in relation to his or her special vacation needs". Therefore, destination attractiveness is something that is recognised by individuals in their process of making decisions with regard to travelling (Lue, Crompton & Stewart, 1996:43).

Table 3.6 exhibits the summarised definitions of destination attractiveness that were reviewed in this study.

Table 3.6: A summary of key destination attractiveness definitions

Author(s)	Focus of definition
Pearce (1979)	Degree to which a destination is capable of meeting tourists' expectations in terms of facilities, amenities, culture, attractions and amenities
Mayo and Jarvis (1981)	The perceived capability of the destination to deliver benefits and satisfaction to visitors
Victor (1989)	Initial drive that influences tourists to choose a destination
Hu and Ritchie (1993)	Feelings, beliefs, and opinions individuals have about the destination's perceived ability to provide satisfaction in relation to their special vacation needs
Kresic (2008)	Attributes of a tourism destination which attracts and motivate tourists to visit
Cho (2008)	Aggregate indicators and attributes that makes a location appealing as a potetntioal tourism destination

Source: Developed by author

It is clear from Table 3.6 that the overall attractiveness of a tourism destination is a function of effective evaluations and perceptions about important attributes of the destination.

3.6.2 Approaches to destination attractiveness

Literature shows that destination studies are becoming more necessary for one to understand the elements that draw and attract people to a destination. Most research studies that were done on destination attractiveness focused much of their efforts developing conceptual frameworks of destination images (Das, Sharma, Mohapatra & Sakar, 2007; Murdy, Pike & Lings, 2012; Pike, 2002). Pike (2002) documents that a total of 142 studies that focused on the image of tourism destinations were conducted between 1973 and 2000. A close look at the review done by Pike (2002) shows that there are several gaps that could be found within the literature as follows:

- Attractiveness of tourism destinations is yet to be measured using a specific travel context;
- Research on destination attractiveness in Africa and Asia is less than other parts of the world;
- Destinations such as regions and/or provinces yet to attract academic interest as compared to countries, states, cities and resorts and national parks;
- Fewer studies have targeted demand side respondents with regard to their country of residence.

The papers that were reviewed by Pike used image as an antecedent of destination attractiveness by means of a wide range of aspects. The aspects that were dealt with in those papers include:

- Segmentation;
- Visitor motivations;
- Image variations;
- Implications of distance from destination;
- Induce destination image;
- Length of stay;
- Familiarity of tourism destinations;
- Image formation;

- Confidence of travellers;

- Decision making processes;

- Positioning of destinations;

- Intention to visit;

- Destination marketing policies (Pike, 2002:542).

However, despite the extensive coverage in terms of destination image as an approach of destination attractiveness, a few of the reviewed papers explored attractiveness in a tourism context.

Tourism product encompasses attractions as core resources (Heath, 2003; Ritchie & Crouch, 2003). Apart from attractions, the tourism product is also composed of other important elements such as services, infrastructure and suprastructure. When these elements are amalgamated, they give the destination its appeal. The diverse nature of the elements that makes up the tourism product has made its attractiveness measurement difficult. Museums or lakes, regardless of where they are located have unique features and their appeal is perceived differently (Formica, 2000). Therefore, using this line of thinking, museums for example cannot be evaluated as identical to other aspects of the tourism product (Formica, 2000). However, there is a mutual agreement among scholars within this domain that there are two approaches that can be used to measure destination attractiveness. Firstly, destination attractiveness can be measured through studying the attractions found in a tourism destination. Secondly the attractiveness of a tourism destination can also be measured by means of assessing the tourists' perceptions with regard to what attracts them to a particular destination. In this particular study, the second approach will be used.

3.6.3 Measuring destination attractiveness

The measurement of destination attractiveness is receiving growing attention, though not at the same level as destination competitiveness (Formica & Uysal, 2006; Kim, 1998; Lee, Huang & Huery-Ren, 2010). According to Reitsamer, Brunner-Sperdin and Stokburger-Sauer (2016:93), two streams of destination attractiveness measurement have evolved in the tourism literature. On one hand, there is a stream of literature that measures attractiveness using the destination's physical attributes (Formica & Uysal,

2006). However, with growing competitiveness and innovation in the global market place, perceiving destinations as distinct using an inventory of natural, cultural and/or environmental resources is suicidal. Destination attractiveness is now, therefore, a complete likeable product that is offered in a tourism destination (Buhalis, 2000). It would also mean those attributes of the product within the tourism destination that are appealing and able to attract or motivate tourists to visit a particular destination (Kresic & Prebežac, 2011).

Cracolici and Nijkamp (2008) argue that there is a need for offering a destination with a variety of products and services as a strategy for creating an attractive and memorable destination experience. Tourists have no intention of visiting tourist destinations with poor supply and which, in their mental faculties, they do not perceive to be attractive. As a result, it is more imperative for destinations to ensure that their overall attractiveness is at least equal, or greater than the competition (Kresic & Prebežac, 2011).

The second stream of destination attractiveness stream of literature measures the aspect of attractiveness using the perception of tourists with regard to the tourism destination (Formica & Uysal, 2006; Kim & Perdue, 2011; Kresic & Prebežac, 2011). Destination attractiveness research over the years has been closely connected to the analysis of image of the destination. The concepts of image and attractiveness of tourism destinations are tied and conceptually intertwined. Despite the fact that there is a symbiotic relationship between image and attractiveness, it is important to highlight that the attractiveness of a destination is largely affected by the image of the destination and *vice versa* (Kim & Perdue, 2011; Kresic & Prebežac, 2011). Therefore, destination attractiveness is considered a key factor in destination marketing yet its measurement has been under researched (Cugno, Grimmer & Viassone, 2012). The notions of destination image, personality and destination attractiveness are relatively fluid and intangibly difficult to make a construct of adequate metrics which would quantitatively measure how attractive a destination is, or in other words, quantifying the magnitude of destination appeal on potential tourists. This study argues that both streams are crucial in the assessment of brand Zimbabwe as a tourism destination.

Though destination personality research is a new realm of branding theory, a couple of studies have been found which have greatly contributed towards the understanding and implications of this multifarious concept (Caprara, Barbaranelli & Guido, 2001; Johar, Sengupta & Aaker, 2005; Venable, Rose, Bush & Gilbert 2005). Unfortunately, this tributary of research only focuses on distinctive aspects of brand personality dimensions and cannot be seen addressing them concurrently. Ye (2012) argues that there is no empirical testing that has been done between branding and destination attractiveness. Hosany *et al.* (2006) provide the most frequent definition of what constitutes destination personality. It is defined as "the set of human characteristics associated with a tourism destination".

Destination personality within the tourism discipline tends to possess also a position that is more similar to brand personality as presented within the marketing sciences domain to differentiate a destination from competition (Murphy, Benckendorff & Moscardo, 2007). Blain *et al.* (2005) argue that this depends on the class in which the destination falls. Thus, the more upper class the tourism destination is, the more the branding strategy will base its brand identities on rich and distinct personalities as a way of creating an attractive tourist destination. Destination personalities have been successfully implemented in Spain (Gilmore, 2002 cited in Ye, 2012) and the UK (Pride, 2002). Thus, for tourist destinations to form an attractive brand, the destination needs to embrace positive awareness, which must be connected to the destination brand (Ye, 2012). This is believed to have an important role in affecting consumers' decisions when considering a destination brand.

This current study argues that attractiveness of a destination serves as a necessary precondition upon which destination competitiveness must be built. Destination attractiveness, as alluded to earlier, is a demand-side perspective where tourism destinations are regarded as suppliers of spatial tourist services with specific attractiveness features that must be managed effectively (Cracolici & Nijkamp, 2008:337; Cugno *et al.,* 2012; Formica & Uysal, 2006; Reitsamer, Brunner-Sperdin & Stokburger-Sauer, 2016:93). The demand side approach to measuring destination attractiveness focuses on tourists rather than the destination (Cugno *et al.,* 2012; Formica & Uysal, 2006). Therefore, destination attractiveness is measured as a function of the tourists' perception of the destination's ability to satisfy their needs and

deliver personal benefits (Cracolici & Nijkamp, 2008; Mayo & Jarvis, 1980, cited in Cugno *et al.,* 2012; Vengesayi, 2005; 2013). Destination attractiveness is considered important especially in understanding the motivations of tourists travel and how a tourist destination can create competitive advantage (Buhalis, 2000; Formica & Uysal, 2006).

3.6.3.1 Factors influencing destination attractiveness

In-depth review of destination attractiveness literature shows that attractions, accessibility, amenities, infrastructure and local communities are key factors for a tourism destination (Buhalis, 2000; Reitsamer *et al.,* 2016:93; Reitsamer & Brunner-Sperdin, 2017:57; Vanhove, 2012). Tourism attractions constitute the primary influence in attracting tourists to a destination (Kim, Ritchie & McCormick, 2012). Apart from attractions, the accessibility is another crucial element of destination attractiveness (Kim, 1998; Vengesayi, 2003). The broad category of amenities, including the availability of accommodation, lodging opportunities, and restaurants, constitutes another important destination attractiveness factor in tourism literature (Murphy, Pritchard & Smith, 2000). A summary of the factors that tourists consider important in choosing an attractive tourism destination are presented in Table 3.7.

Table 3.7: A summary of destination attractiveness factors

Study/Source	Dimensions of destination attractiveness	Location
Reitsamer & Brunner-Sperdin (2017)	Accessibility; amenities; attractions and activities; entertainment options; and local community.	Austria
Reitsamer *et al.* (2016)	Accessibility; amenities; local community; and scenery.	Alpines
Lee *et al.* (2010)	Tourist attractions; accessibility (internal and external access); amenities (lodging and recreation) and complementary services (information services, safety and sanitation).	Taiwan
Cracolici & Nijkamp (2008)	Tourist attributes (reception and sympathy of locals; art and culture; landscape, hotels, food, events, prices, costs of living, quality of products, safety of tourists and wine quality).	Italy

Formica & Uysal (2006)	Tourism services and facilities (eating and drinking places, retail sale, souvenir firms, travel agencies, hotels, motels, golf courses); cultural/historic (buildings, museums, historic districts, civil war sites, festivals and wineries); Rural lodging (campsites, cottages, bed and breakfast, recreational park vehicles); outdoor recreation (horseback riding, falls, biking).	United States
Vengesayi (2003)	Intrinsic destination resources and mix of activities; experience environment; supporting services; communication/promotion.	Australia
Deng *et al.* (2002)	Peripheral attractions; accessibility; tourism resources; tourism facilities; local community.	Australia
Murphy *et al.* (2000)	Environment (pleasant climate, attractive scenery, clean city, heritage, ambience, friendly people); Infrastructure (good food, interesting attractions, good hotels); Quality (overall satisfaction, quality relative to the United States); Value (reasonable prices, value for money for the trip, value relative to the United States); Intention to return (return to Victoria within 2 years, return to other island destinations within 2 years).	Canada
Kim (1998)	Seasonal and cultural attractiveness (seasonal attractiveness, uniqueness of the place, plenty of fun and sightseeing, cultural experience and historic sites); Clean and peaceful environment (quiet and peacefulness, cleanness and sanitation, natural environment, fresh air, clean water, price levels); Quality of accommodation/relaxing facilities (Availability and quality of lodging, resting and relaxing facilities, variety of types of foods and beverages); Family oriented amenities and safety (suitability for families with children, safety of the place, experiencing new and different lifestyles with others); Accessibility and reputation (time spent travelling to the place, site reputation and famous image; convenient traffic and location); Entertainment and recreational opportunities	Korea

	(nightlife and evening entertainment, scenery and landscape, sports and recreational opportunities).	
Laws (1995)	Primary destination features (climate, ecology, culture, traditional architecture); Secondary destination features (hotels, catering, transport, entertainment).	Australia
Hu & Ritchie (1993)	Availability/quality accommodation; sport/recreational opportunities; scenery; climate; food; entertainment; historic attractions; uniqueness; cultural attractions; accessibility; festivals/special events; shopping; local transportation; price levels.	Canada
Backman *et al.* (1991)	Coastal counties (Tourism-supporting services, accommodations/resort amenities**)** Mid-state counties (Tourism-supporting services, scenic/camping, outdoor activity) Up-state counties (Tourism-supporting services, outdoor recreation, historic/environment).	United States
Goodall & Bergsma (1990)	Attractions; Facilities and services available; Accessibility; Image; Total price to the customer.	UK; Netherlands
Ferrario (1979)	Scenery and landscape; Zoos and wildlife; Natural vegetation; Sun and beaches; Historical monuments; Sport amenities; Town visits and shopping; Participation in local life Nightlife entertainment.	South Africa
Ritchie & Zins (1978)	General factors (Natural beauty and climate, culture and social characteristics, sport, recreation, and educational facilities, infrastructure, price levels, attitude towards tourists, accessibility of the region) Dimensions of cultural attractiveness (Elements of daily life, remnants of the past, good life, work).	Canada
Var, Beck & Loftus (1977)	Natural factors; Social factors; Historical factors; Recreation and shopping opportunities; Accessibility Accommodations.	Canada
Gearing *et al.* (1974)	Natural factors; Social factors; Historical factors; Recreational and shopping facilities; Food and shelter.	Turkey

Source: Developed by author and adapted from Reitsamer and Brunner-Sperdin (2017:58)

It is clear that destination attractiveness research has been lacking in the context of Africa, as only one study was done in 1979. There has been no formal research done in Zimbabwe regarding destination attractiveness assessment. Additionally, there is a general lack of standardisation of the dimensions of measuring destination attractiveness as shown by literature in Table 3.7 above. Most of the studies, however, use attractions, accessibility, amenities and facilities, as well as cultural attractions in measuring the attractiveness of destinations. More importantly, it is clear that destination attractiveness has not been well researched as destination competitiveness, though it is a crucial antecedent of destination competitiveness.

Therefore, it is clear that it is the attractiveness of these factors that influences tourists' visitation to a tourism destination. Research shows that tourism destinations can improve international tourist arrivals and receipts by using a mixture of a destination's attributes of supply (competitiveness) and demand (attractiveness) aspects (Tam, 2012). This current study also considers these same attractiveness factors as important driving forces for tourists in choosing brand Zimbabwe.

The next section integrates the discussion on destination competitiveness with destination attractiveness.

3.7 LINKING COMPETITIVENESS AND ATTRACTIVENESS

The lenses that are used to view the concepts of attractiveness and competitiveness in a tourism context are different. On the one hand, attractiveness of a destination is viewed from the demand side perspective. On the other hand, competitiveness is argued from the supply side perspective. This study espouses a dual appraisal of these concepts within the context of the Zimbabwe as a tourist destination brand in an endeavor to offer a holistic outlook in relation to destination competitiveness and attractiveness dynamics. According to Vengesayi (2003:639), destination competitiveness and attractiveness refer to "the ability of a destination to provide social, physical and economic benefits to the destination population as well as satisfying the experience of the tourist".

The earlier discursive prose done in this study on destination attractiveness and competitiveness shows that studies on attractiveness of tourism destinations focused on the ability of destinations to meet tourists' needs, and their motivations with regard to visitation (Cugno *et al.,* 2012; Formica & Uysal, 2006). The focus of destination competitiveness is the emphasis it places on the abilities of tourism destinations to produce quality goods and services that enhance the standard of living for the destinations residents (Enright & Newton, 2004; Hong, 2008; Kozak & Rimmington, 1999; Ritchie & Crouch, 2003). However, research that analyses these two concepts dually is still quite lacking (Kladou *et al.,* 2015; Vengesayi, 2003).

Kladou *et al.,* (2015) document that only three papers to date have used both the demand and supply side perspectives in assessing the success of destination brands. This current study seeks to broaden the existing destination branding research by narrowing this gap through the assessment of brand Zimbabwe in relation to competitiveness and attractiveness as a tourism destination. The contribution of this study is its context; to empirically analyse data obtained from both the supply and demand side perspectives as a way of assessing brand Zimbabwe in relation to competitiveness and attractiveness as a tourist destination. Balanced evaluation of brand Zimbabwe in relation to competitiveness and attractiveness is going to enunciate the genesis of matching the destination's interests with the tourists' interests for effective destination branding management. This current study seeks to address this link between tourism demand and supply through the development of a context-specific framework as shown in chapter one.

Progress has been witnessed in terms of competitiveness modelling in the wider tourism discourse but a review of literature has shown that most of the existing models and frameworks are too deficient in terms of providing empirical evidence to support and validate the proposed models by researchers (Kim, 2012:222; Vengesayi, 2003:644). Research within the domain of destination branding has been too conceptual and now is the time for research to make a shift towards validation of proposed models and frameworks. The dual perspective of destination branding research continues to be less explored and existing models on destination competitiveness and attractiveness more often than not have not been able to clearly assess destination brands in relation to competitiveness and attractiveness. A

symmetrical assessment of brand Zimbabwe pronounces the genesis of bringing to harmony issues of destination interests together with those of the tourists.

For the purposes of this study, the following destination attractiveness dimensions were deemed important for demand survey:

- Tourists' motivations;
- Tourists attractions;
- Destination amenities;
- Accessibility of destination;
- Ambiance of destination;
- Destination's environment;
- Price attractiveness;
- Brand attractiveness;
- Destination's brand identity;
- Destination's brand image; and
- Destination brand loyalty;
- Politics and policies.

These dimensions were chosen because some of them had been extensively used in literature as shown in Table 3.7. However, the study also added some dimensions of destination brand attractiveness, image, brand loyalty and brand identity as a way of determining the link between destination branding with attractiveness.

The next section discusses the competitiveness and attractiveness of brand Zimbabwe as a tourism destination.

3.8 COMPETITIVENESS AND ATTRACTIVENESS OF BRAND ZIMBABWE

The 2017 World Travel and Tourism Competitiveness (WTTC) report provides the latest iteration of tourism competitiveness index. Travel and Tourism Competitiveness index measures the "the set of factors and policies that enable the sustainable development of the travel and tourism sector which, in turn, contributes to the development and competitiveness of a country" (WEF (World Economic Forum), 2017). The WTTC report is traditionally published biennially and it provides a

benchmark with regard to competitiveness of the travel and tourism sector of 141 economies including Zimbabwe.

The tourism sector is ranked the worst travel destination in the world. In 2015, Zimbabwe was ranked 115th out of 141 competing destinations (WEF, 2015). Currently, Zimbabwe is ranked number 126 out of 138 economies, implying that its competitiveness slipped by 5 places. This was attributed to poor levels of economic productivity (WEF, 2017). Further challenges that have been documented by the World Economic Forum include the destination's long challenges of poor health systems, poor levels of economic productivity, poor infrastructure, poor technology and a bad business environment. In 2008, Zimbabwe was ranked 117 out of 130 economies, having being ranked 107 in 2007.

Barros and Dieke (2008) argue that destination quality is an important determinant of destination attractiveness and competiveness. The quality of the destination is critical in influencing visitation and increasing outputs such as tourist revenue and arrivals (Assaf & Tsionas, 2015:58). The destination's quality metrics involve, among other things, the tourism destination's infrastructure, its human resources and service (Assaf & Tsionas, 2015:59). Zimbabwe is ranked among the lowest 10 destinations with poor quality (Assaf & Tsionas, 2015:66).

The hosting of the 20th UNWTO General Assembly in 2013 did not help matters as Zimbabwe is currently ranked ranked low in terms of quality and overall competitiveness (WEF, 2017). Zimbabwe Tourism Authority (ZTA), a national tourism organisation charged with the responsibility of marketing Zimbabwe as a tourism destination, has been involved in a number of promotional activities in the past. The efforts implemented saw celebrities coming to Zimbabwe as a means of boosting tourism numbers that were dwindling following the land reform programme and contested elections (ZTA, 2006). High profile celebrities such as Joe Thomas, Ciara and Akon were brought in as a way of sprucing the country's tattered image. Since the year 2013 to date, ZTA have made an effort by hosting an annual International Carnival. The objective of this annual event is based on the hope that it will bring the much-needed shift in international perception with regard to safety concerns about Zimbabwe. The success of these efforts in influencing destination attractiveness and

competitiveness is yet to be determined. The concern of this study is to assess the effects of destination branding on destination competitiveness and attractiveness; given that ZTA as Zimbabwe's DMO is spending millions of dollars to market Zimbabwe as a safe destination brand to the international tourism market.

Following the land reform programme in 2000 and political violence that marred the 2002 and 2008 elections, many regarded Zimbabwe as a pariah state where terror reigned supreme. As a result, the number of foreign tourists has been plummeting. Between the period of 1999 to 2013, the number of tourists from Europe fell by more than 66% from 380 113 to 128 901 (a region that Zimbabwe considers to be its cash cow). The American market fell by 53% from 116 109 to 54 157, while the Oceanian market also declined by 65% from 65 281 to 22 698 (a region Zimbabwe sought in its *Look East Policy* following the worsening relations between Harare and the West) (ZTA, 2013). Thus, Zimbabwe has been pursuing a lot of destination branding efforts as an attempt to rebuild its negative country image and shake off negative perception in key tourism source markets, such as Europe and America, which raised red flags following the political unrest and economic turmoil that were precipitated by the controversial land reform programme by government in 2000.

3.9 CONCLUSIONS

The purpose of this chapter was to deliberate the concepts of competitiveness and attractiveness within destination contexts. This was achieved by means of a comprehensive literature review. This chapter concludes that the concepts of destination attractiveness and competitiveness are complex in nature. The study also concludes that, despite an increased stream of research that focuses on destination competitiveness and destination attractiveness; there are still noticeable gaps in the literature. More research is therefore required particularly in the context of Zimbabwe and other African destinations. This call for further research is crucial if practitioners are to better their knowledge and understanding of key factors that contribute toward competitiveness and attractiveness of tourism destinations.

There is no consensus on what constitutes destination competitiveness and attractiveness among scholars. This has led to the general lack of standardisation in

terms of the measurements of the two aspects of competitiveness and attractiveness. While there is no commonly established set of destination competitiveness and attractiveness factors for all tourism destinations, it is indispensable for this study to explore the different types of competitive and attractive indicators that are relevant for Zimbabwean tourism.

A glut of definitions as to what constitutes destination competitiveness and the numerous models that have been developed to date did not make things better as the measurement and conceptualisation of the problems persist. Consequently, due to a lack of universal definitions and measuring variables, destination competitiveness and destination attractiveness are not straightforward concepts.

The overview of destination competitiveness and attractiveness provided the researcher with good and comprehensive insights into the background, origin, applications, challenges and methodological concerns. This study acknowledges great advances that have been made in terms of destination attractiveness and competitiveness modelling. However, Africa in general and Zimbabwe in particular is yet to attract more interest in destination competitiveness and modelling. Consequently, in searching for the models to assess destination competitiveness and attractiveness, no framework was found that had been formulated for small and developing countries like Zimbabwe. The models and frameworks that exist in the wider tourism literature lack empirical validation both to the destinations that they were designed for and smaller destinations like Zimbabwe. However, despite the lack of empirical validation, these models were of great importance in the development of the framework for this current study.

In doing an in-depth literature search, it was possible to identify factors that could influence destination competitiveness and attractiveness and some of these factors were used in the development of the survey instruments. The present study argues that attractiveness refers to a demand-side perspective regarding a tourism destination like Zimbabwe, as suppliers of spatial tourist services with specific attractiveness features must be managed effectively. In the same vein, this study argues that the competitiveness of a tourism destination is a supply side perspective. Additionally, there is a lack of research in terms of a dual perspective in assessing

destination competitiveness and attractiveness. For this reason, it is the premise that formed the basis of this study; and this study believes that the dual assessment of the destination's brand performance is the starting point in meeting the interests of both tourists and the destination. It is imperative to note that understanding competitiveness and attractiveness of a tourism destination, and its determinants is critical for the assessment of Zimbabwe as a tourism destination brand.

To conclude, in assessing brand Zimbabwe's competitiveness and attractiveness as a destination, factors identified can be helpful to destination marketers. Destination competitiveness and attractiveness factors can be used to focus on competitive and attractive attributes of the destination and subsequently minimise its negative attributes within its destination branding efforts.

The next chapter presents and discusses the study's method of research.

CHAPTER 4

METHOD OF RESEARCH

Research is to see what everybody else has seen and to think what nobody else has thought – Albert Szent-Gyorgyi

4.1 INTRODUCTION

Chapters 2 and 3 provided a comprehensive probe of published data on destination branding, destination competitiveness and attractiveness. The discussion made in these two chapters revealed that destination branding, destination competitiveness and destination attractiveness are intricate elements within the broader tourism research. Destination competitiveness and attractiveness in this study is considered to be complex and therefore has multiple elements. The current study addressed the research problem concerning the assessment of brand Zimbabwe's competitiveness and attractiveness as a tourism destination. The general deficiency of empirical research on the assessment of destination brand performance within the Zimbabwean tourism milieu inspired the need to carry out this present study.

The objective of this chapter is to discuss the method of research that was used in the empirical survey. This objective is achieved in 5 sections. The initial section of the chapter provides the insights into the research philosophy that was espoused in this study. The second section of the chapter delves into the research designs that suited the nature of the study. The study used the descriptive, exploratory and explanatory research designs. The importance of literature review in this study forms part of the third section of this chapter. Fourthly, the chapter focuses on the administration of the empirical survey. The study employed two distinct phases in its methodology, with the initial phase focussing on the development of the survey instrument that was used in assessing the competitiveness and attractiveness of Zimbabwe as a tourism destination brand. The assessment of brand Zimbabwe used both the demand and supply perspectives. The second phase describes the empirical survey that was done as a way of answering the research problem. The last section of this chapter discusses

the statistical data analysis methods that were employed in this study. Figure 4.1 below provides a layout of how this specific chapter and its components are structured.
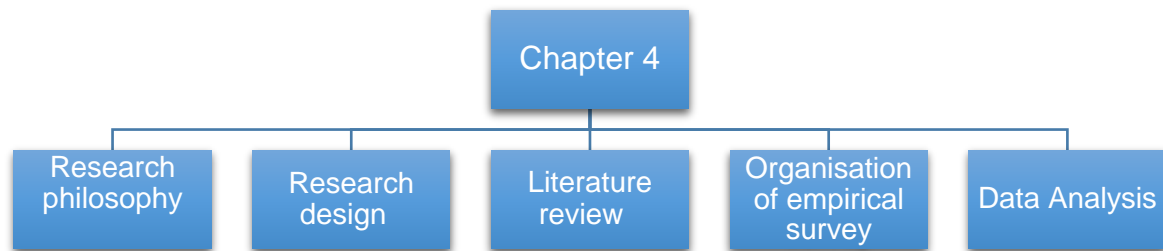
Figure 4.1: Schematic presentation of chapter
Source: Developed by author

4.2 RESEARCH METHODOLOGY

The way in which data is gathered for a research study is called research methodology. Therefore, according to Krauss (2005:760), research methodology is considered to be the blueprint upon which the collection, measurement and analysis of data is based in an endeavour to achieve the study's objectives. Research methodology is a systematic way that is used to solve a problem. The choice of a research methodology is influenced by the research objectives as well as the study's information requirements (Cooper & Schindler, 2003:38). The methods of research are categorised into two: quantitative and qualitative research. In other contexts, these categories of the methods of research are often referred to as research paradigms (Bruce, 2007:78; Tewksbury, 2009:42). The next section discusses the individual narratives of these methods of research.

4.2.1 Qualitative research

Qualitative research is concerned with the assessment of attitudes, opinions and behaviour of a population of interest. In circumstances where it is used, the research is usually a function of the researcher's insights and impressions. According to Patton and Cochran (2002:4) the outcome of qualitative research is usually non-quantitative as there is limited use of rigorous quantitative data analysis. Focus group discussions, interviews and project techniques are usually used as data collection techniques. The sample for qualitative research method is generally smaller as compared to quantitative methodologies and is not representative of the broader population (Patton & Cochran, 2002:5). The results that are obtained in a qualitative research

methodology are more often difficult to generalise, and might suffer from researcher's bias.

In the next section, the concept of quantitative research is discussed in more depth, since this was the chosen methodology for this study.

4.2.2 Quantitative research

Patton and Cochran (2002:4) define quantitative research as a method of research that generates data in a form that can be subjected to rigorous analysis. A quantitative method of research is a systematic and objective way of using data that has been collected from a selected population (Bruce, 2007:45; Jennings, 2010:231). The results of a quantitative methodology can be generalised to the area under study depending on the sampling techniques utilised. It relies on the gathering of numerical data. Therefore, the key aim of quantitative research is to count and measure events as well as performing statistical analysis (Creswell, 2014; Zikmund & Babin, 2013).

Quantitative methodology is usually informed by the positivist philosophy (Jennings, 2010:231). It is a method of research that is able to eliminate subjectivity and ensures higher levels of reliability of gathered data (Bruce, 2007:70; Creswell 2007:71). The quantitative research methodology allows studies to be replicated or repeated given its high reliability. A quantitative research methodology was considered indispensable because of its ability to attain numerical and quantifiable data that can be statistically analysed (Creswell, 2014; Zikmund & Babin, 2013). More specifically, a quantitative research methodology was regarded appropriate because of it being an inexpensive and suitable way of collecting a wide range of data (Hair, Wolfinbarger, Ortinau & Bush, 2010:78). This study, therefore, used quantitative methods where data was collected from the demand and supply perspectives using a structured questionnaire specifically related to the assessment of brand Zimbabwe's competitiveness and attractiveness.

A quantitative research method was a more apt technique of research, principally because the study was dealing with a large sample of respondents, both from the demand and supply side perspectives (Hair *et al.,* 2010:78, 2009 and 1998). Thus, it must be reiterated that the use of a quantitative methodology was favourable for this

study as it assisted the researcher in relation to the origination of precise and concise questions for both demand and supply side respondents (Hair *et al.,* 2010:78). Consequently, the positivist paradigm was deemed apposite for the development of a competitiveness and attractiveness assessment framework for this study.

The next section discusses the research philosophy.

4.3 RESEARCH PHILOSOPHY

This section of the chapter discusses the research philosophy that was employed in this study. Research philosophy is commonly considered as a belief that explains how data about something has or must be collected, analysed and used (Creswell, 2014; Saunders *et al.,* 2009). There is a general agreement among research scholars that there are two major research philosophies, namely the positivist philosophy (sometimes called scientific) and the interpretivist philosophy (also known as the anti-positivist). Therefore, it is imperative to acknowledge that the thrust of this section is to offer a clearer understanding of research philosophy that was chosen for this study.

4.3.1 Interpretivist philosophy

Critics of the positivism such as Saunders *et al.* (2009:315) argue that rich insights regarding the multifaceted world are always lost especially when such intricacy is abridged through a number of sequences of generalisations. Interpretivism promoters argue that it is important for one to recognise the variances that exist amongst humans as social actors of the environment (Saunders *et al.,* 2009:315). The emphasis of this philosophy is the need to conduct research among people rather than objects such as computers.

Representativeness under this philosophy is therefore built and understood subjectively relative to each individual and only becomes more significant through social and empirical circumstances or contexts (Creswell, 2014; Saunders *et al.,* 2009). It is therefore imperative to acknowledge that with Interpretivism, numerous realities can exist as a result of multiple perspectives of reality and the world in which it functions (Jennings, 2001:39). Qualitative research methods are, therefore, regarded as better suited to increase the understanding of why things are the way they

are in the social world. An abridged summary of the characteristics of interpretivist philosophy are presented in Table 4.1,

4.3.2 Positivism philosophy

Positivism is a philosophy of language and logic consistent with an empiricist philosophy of science (Malhotra & Birks, 2006:136). The central belief of positivism is that research must be scientific as is the manner in natural sciences (Malhotra & Birks, 2006:136) and works with an observable social reality that allows law-like generalisations (Saunders *et al.,* 2009:113). Reality is commonly stable and therefore should be observed and described from an objective viewpoint (Malhotra & Birks, 2006:136), without interfering with the phenomenon being studied. Proponents of this philosophy of research are content that phenomena should be isolated and that observations should be repeatable. Research under the positivist philosophy is usually undertaken in a value-free way (Saunders *et al.,* 2009:114) and therefore explains how variables interact. It also explains how variables are events shaped and how outcomes are caused outcomes in quantitative terms (Tuli, 2010:100; Saunders *et al.,* 2009:114).

The basic characteristics of both the positivist and interpretivist philosophy are presented in Table 4.1 below. The essential assumptions, fundamental opinions and the methodological emphasis that relate to each philosophy are also presented in Table 4.1 below. As deliberated earlier, positivist and interpretivist philosophies are two dissimilar research philosophies that exemplify a different manner of observing the world in an undertaking to perceive, observe, measure and understand the realities within specific social science frameworks (Saunders *et al.*, 2009:113). Consequently, based on the characteristics presented below (refer to Table 4.1), this current research reflects principles of positivism, as is the practice in tourism branding research (Khan & Rahman, 2015:5).

Table 4.1 Comparison of positivist and interpretivist research philosophies

Characteristic	Positivism philosophy	Interpretivism philosophy
Ontological basis **(How is the world perceived?)**	• Independent of social actors • Universal laws and truths can explain causal relationships • Founded upon deductive logic • Precise empirical observations • Explain, discover or confirm "reality" objectively	• Research question is answered using multiple views • Truths and meaning suitable to all situations and problems • Inductive approach to develop the basis for theory building
Epistemological basis (View regarding what is acceptable)	• Only observable phenomena provide credible data and facts • Objective • Value – free interpretations	• Either or both observable phenomena and subjective meanings • Subjective • Focus on practical applied research
Methodological basis	• Quantitative • Qualitative methods can be used	• Qualitative
Methodological emphasis	• Quantifiable observations • Measurable outcomes • Testing of theories • Statistical analysis to evaluate results • Generalisation of findings for application across contexts • Surveys, questionnaires, case studies, experiments to capture primary data • Empirical testing and verification of hypothesis	• Interpretive outcomes • In-depth interviews, focus groups, observations • Theory building • Insider's perspective and expert opinions is provided on a research question • Relies on people's words as primary data
Application in destination branding research	• Dominant philosophy	• Emerging philosophy
Application in destination competitiveness and attractiveness research	• Dominant philosophy	• Emerging philosophy

Source: Developed by author based on Saunders *et al.* (2009:119) Malhotra and Birks (2006:139); Khan and Rahman (2015:5); Khalilzadeh and Tasci (2017:89).

This study used a positivist philosophy that followed a quantitative methodological approach. The philosophy was necessary for this study because the concepts of

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competitiveness and attractiveness are complex as indicated in Chapter 3. The methodological emphasis was also chosen for this study because it helped the researcher to assess the competitiveness and attractiveness of brand Zimbabwe as a tourism destination in a more measurable and objective manner.

The next section discusses the research design that was used in this study.

4.4 RESEARCH DESIGN

This section of the chapter describes the research designs that were employed in this study. The study used descriptive research, exploratory and causal research designs for the purposes of meeting the study objectives (refer to Chapter 1). The goal of the research design was to help the researcher in navigating through the research process to achieve the study's objectives.

4.4.1 Descriptive research design

The intention of descriptive research is concerned with describing the features of a group by answering "who, what, when, where and how" questions of research (Babbie & Mouton, 2003:80; Hair *et al.*, 2010:36; Malhotra, 2010:106; McDaniel & Gates, 2013:66; Sahu, 2013:27; Tustin, Ligthelm, Martins & Van Wyk, 2005:86;Zikmund & Babin, 2013:49). Zikmund and Babin (2013), note that descriptive research design is aimed at "telling the picture or the story" of the research situation. Descriptive research design habitually brings to the fore the relationships that might exist between two variables which helps to the researcher specifically when choosing variables to use in the causal research (McDaniel & Gates, 2013).

Zikmund and Babin (2013:51) claim that, unlike exploratory research, the descriptive research design demands quite an all-encompassing understanding of the market condition and guides the study towards context-specific issues. Descriptive research diverges from exploratory research in that some familiarity on the topic already exists. Cargan (2007) argues that the difference between descriptive and exploratory research is that with descriptive research, some level of familiarity on the phenomenon being researched is already in existence. The resolve in descriptive research is generally to describe, formulate specific hypotheses and conclude with hypotheses tests (Malhotra, 2010:106; Zikmund & Babin, 2013:51). According to Zikmund and

Babin (2013:51), the formulation of hypotheses in descriptive research helps the researcher in implementing the research and such hypotheses may be tentative and speculative.

Descriptive research provides an outline of the phenomenon being studied and its relationships (Zikmund & Babin, 2013). For this study, the implications of destination branding on destination competitiveness and attractiveness in the empirical context of Zimbabwe were under investigation. However, descriptive research does not give details for the relationships that are present or offer proof of the connexion (Jennings, 2001:17; Zikmund & Babin, 2013). Descriptive research was used to describe the sociodemographic, motivations and tripographics of demand side respondents. Additionally, it was also used to describe the characteristics of the supply side respondents, particularly their categories, length of operation, operation schedule, and employees, among other things. The study also endeavoured to riposte the question as to what aspects make brand Zimbabwe a competitive and attractive tourism destination.

4.4.2 Exploratory research design

Exploratory research is carried out when, normally, there is little preceding knowledge on which to build, and the existing research hypotheses are unclear or do not exist at all (Jennings, 2001:6). The results of an exploratory research are used to develop a bigger research project (Jennings, 2001:6). Exploratory research design is also known as the formulative research design because its main thrust is to formulate and contextualise the research problem more precisely (Hair *et al.,* 2010:36; Malhorta, 2010: 104; Zikmund & Babin, 2013). Therefore, exploratory studies are deemed to be an important means of finding what is occurring and to consider a phenomenon in a new perspective (Zikmund & Babin, 2013). Exploratory research is generally employed in the following circumstances:

- when the researcher is exploring novel issues to satisfy inquisitiveness (Babbie & Mouton, 2003:79);
- when defining or formulating a more precise research problem (Babbie & mouton, 2003:79; Malhorta, 2010:104; Zikmund & Babin, 2013);
- when investigating the practicability of carrying out a more comprehensive research study (Babbie & Mouton, 2003:79);

- when developing approaches that can be used in similar studies (Babbie & Mouton, 2003:79);
- when defining the priorities for future research (Babbie & Mouton, 2003:79; Malhorta, 2010);
- when developing new hypotheses about a prevailing occurrence (Babbie & Mouton, 2003:79; Kothari, 2004:36; Malhorta, 2010:104);
- when ascertaining new configurations or generalisations (Babbie & Mouton, 2003:79);
- when there is deficiency of empirical research on a phenomenon that is being investigated (Aaker *et al.,* 2011:72; Yin, 2003);
- when equivocal positions need to be clarified (Zikmund & Babin, 2013: 48)
- when classifying pertinent variables and associations for auxiliary investigation and research (Aaker *et al.,* 2011:72);
- when identifying possible alternative courses of action (Babbie & Mouton, 2003; Malhorta, 2010).

It is important to note that, the exploratory research design aided in the origination of the research's working hypothesis from an operative viewpoint. The study followed an exploratory research design since a more comprehensive literature search was conducted in Chapters 2 and 3 for the purposes of discovering the perceptions and concepts in relation to destination branding and its subsequent effect on a destination's competitiveness and attractiveness. Exploratory research was employed in this current research in an attempt to uncover the constructs and complexity of destination competitiveness and attractiveness from destination branding and tourism related literature (refer to Chapters 2 and 3). The exploratory nature of this research is further justified by the fact that, there is a general dearth of empirical research on destination performance assessment in relation to competitiveness and attractiveness specifically in a Zimbabwean context. The exploratory design was related to the first two objectives of this study (refer to 1.4.2).

4.4.3. Causal/Explanatory research design
Causal research answers both the "how" and "why" questions (*assess and explain* the causality between variables). It is believed that a well-prepared research problem must

contain causal research elements (Yin, 2003). Research shows that a causal based research design is employed by researchers to gather evidence of the causal relationships that exist between two or more variables (Hair *et al.,* 2010:36; Malhotra, 2010:113; Zikmund & Babin, 2013:51). Zikmund and Babin (2013:52) note that causal research is generally confirmatory in nature. As a consequence, researchers are able to make causal interferences. According to Zikmund and Babin (2013:52), descriptive and exploratory research commonly heralds causal research, suggesting that causal research is more multifaceted.

Jennings (2001:18) argues that causal research design is deemed useful because by nature, quantitative methodologies are used to examine variables and construct hypotheses that are needed to support or reject causal associations between them. Therefore, research hypotheses, which are planned to develop, lengthen, or disprove a previously recognised body of knowledge, are an integral part of this approach (Zikmund & Babin, 2013). The emphasis of causal research is on examining a situation or a problem with the intent of explaining the relationships between variables (Saunders *et al.,* 2012:98).

In this study, causal design was employed as a way to empirically measure the relationships between destination branding, destination competitiveness and attractiveness in the context of brand Zimbabwe as a tourism destination. ANOVAs, Spearman's rank order correlations and stepwise multiple regression analysis were therefore used for this purpose.

4.5 IMPORTANCE OF LITERATURE REVIEW

The theoretical background of destination branding, destination competitiveness and attractiveness were explored by means of a comprehensive literature review. Literature search or review encompasses the methodical examination of academic or research-based knowledge that is obtainable on a specific domain of research (Creswell, 2014; Dawidowicz, 2010:5; Zikmund & Babin, 2013:58). Consequently, according to Hair *et al.* (2010:51), the review of literature is considered as a focussed exploration and wide-ranging analysis of accessible secondary data information sources that deliberate the theory and present empirical results that are relevant to the research topic at hand. Literature review contributes towards an improved

understanding of the research topic and it allows the researcher to identify the gaps in existing research (Jesson, Matheson & Lacey, 2011:10).

Literature review was beneficial because it allowed the researcher to place the current study into context, as the review was able to demonstrate the crucial theories, models, arguments and controversies that surround destination branding, destination competitiveness and attractiveness (Hair *et al.,* 2010). In addition, literature review offered the researcher an outline for scheming the agenda of the study. It also helped the researcher to plan on how to address the research problem effectively. A wide literature review was considered to be indispensable for the current study. The importance of such a review of literature was based on the need to gain insights into the concepts of destination branding, destination competitiveness and destination attractiveness, where it fits in the wider marketing and tourism domain and its measurement. Literature review for this study was done in two parts (refer to Chapter 2 and 3).

Chapter 2 of the study deliberated and contextualised destination branding in relation to this study. This was attained by firstly defining brands and destination brands as well as explaining the importance of branding in the tourism context. Destination branding concepts and frameworks were discussed. In addition to this, after the frameworks were discussed, the focus shifted towards discussing destination branding in the context of Zimbabwe and this was done through appraising the efforts Zimbabwe has made in terms of destination marketing and branding. Chapter 3 focused on providing the theoretical foundation for destination competitiveness in terms of definitions, origins, and the application of competitiveness to tourism destinations. Destination attractiveness was also conceptualised and discussed and existing competitiveness and attractiveness models were also evaluated. However, the aspects of destination branding identified in chapter 2 and the aspects of destination competitiveness and attractiveness identified in chapter 3 provided the researcher with a framework for questionnaire development that was employed in assessing destination competitiveness and attractiveness.

Key words that were used in the literature search included: *destination; destination branding; destination competitiveness; destination attractiveness; effects of branding; country branding; national branding* and *Zimbabwe.*

A comprehensive exploration of literature sources performed in this study was based on literature obtained from peer-reviewed journal articles, textbooks, dissertations and other materials that enabled the researcher to have adequate awareness on the issues under investigation. Information sources that were also used include the North-West University Library databases, Business Source Premier, Elsevier, Emerald, Heal-Link, JSTOR, Sage, Google Scholar and Google. Literature for relevant methodologies and statistical techniques used in this study was obtained from business and marketing research textbooks, other international peer-reviewed literature on research methodology and statistical analyses, as well as the Internet.

The researcher used journals that are listed on Scopus and Web of Science as one of the criterions regarding which sources to review. Additionally, journals accredited by the Department of Higher Education and Training (DHET) were also used as criteria in selecting which sources of reference to review. Studies done in Africa and developing economies were also considered as part of the criteria. This study employed both primary and secondary data sources, which refers to the empirical survey and comprehensive literature review.

The next section discusses the organisation of how primary data were collected.

4.6 ORGANISATION OF EMPIRICAL SURVEY

This survey was two-fold: it was organised from a demand (attractiveness) and supply (competitiveness) side perspectives. Research shows that empirical studies that have measured the relationship between destination branding with competitiveness and attractiveness are lacking. Additionally, chapters 2 and 3 show that there is a lack of standardised measuring instruments of competitiveness and attractiveness of tourism destinations. Many studies have used different variables to measure the same concepts in different countries. Due to the lack of standardised and empirically tested models, it was prudent for this survey to develop specific survey instruments that were

employed in the competitiveness and attractiveness assessment of brand Zimbabwe as a tourism destination.

Consequently, pre-tested items for the survey were primarily generated from a comprehensive literature review, which identified aspects that could measure destination competitiveness and attractiveness. Therefore, the empirical research for this current study consisted of two research phases, that is, phase 1 and phase 2.

4.6.1 Phase 1 of empirical research

The development and design of suitable measuring instruments is imperative in guaranteeing the quality of research (Malhotra, 2010). Following a comprehensive review of related literature for this study (refer to Chapters 2 and 3), a number of destination competitiveness and attractiveness variables were realised. The factors that were raised in literature with regard to the assessment of destination competitiveness and attractiveness were too many for the development of measuring instruments. It was necessary to optimise the measuring variables for competitiveness and attractiveness. Therefore, phase 1 of the empirical research was concerned with the development of suitable measuring instruments for both the demand and supply surveys.

During this phase, judgmental sampling was employed to target academics, particularly those whose work was reviewed in the literature chapters. Additionally, the same sampling technique was used to identify industrialists who had knowledge and experience of destination branding, competitiveness and attractiveness in the tourism context (Jennings, 2001). The experts who served in reviewing research items in phase 1 of the empirical survey comprised experts in destination marketing and prominent researchers on destination branding, competitiveness and attractiveness across the globe. A total of 7 academics drawn from Africa, Europe and the United States. 3 industry experts (two from Zimbabwe and one from Ghana) agreed to participate in the review of the survey items and this study considered this number of experts to be suitable to proceed with during phase 1. Phase 1 of the study was conducted between 31 May 2016 and 31 July 2016.

The supply survey instrument focused on destination competitiveness assessment and experts commented on the need to use a random listing of the questions as a way of eliminating fatigue bias. Additionally, it was also commented that the study avoid the use of abbreviations of words like VAT, ICT and spell them out as some people may not be familiar with them. With regard to the demand survey, experts also indicated that the study should explore the tourists' travel behaviour as well as their motivations. Therefore, the measuring instruments were tested in phase 1 of the survey for face and content validity.

4.6.2 Development of final survey instruments

The designing process of survey instruments on any given research topic is a challenging exercise. Oftentimes, if the questions in a survey instrument are wrongly stated, the entire measurement instrument will be flawed (Babbie, 2013:237). The use of uncluttered survey instruments for this study was, therefore, highly critical. The researcher ensured that the questions used in both survey instruments were based on the study, goals and research problem. The draft of final survey instruments with all essential modifications in terms of elements, questions on tourist profile, travel behaviour, destination attractiveness items, organisational profile, destination competitiveness and other essential additions were therefore submitted to the study's promoters for critique and approval.

4.6.2.1 Final demand side survey instrument and constructs operationalisation

The demand survey focused on destination attractiveness of brand Zimbabwe as a tourism destination. The final demand side assessment survey instrument was kept straightforward and precise. It was designed with the purpose of obtaining the demographic profile of tourists, and the travel behavioural information of tourists visiting Zimbabwe. Additionally, it was also structured to determine the reasons for why they were visiting Zimbabwe as well as the tourists' opinions in relation to the attractiveness of Zimbabwe as a tourism destination. The researcher designed the questionnaire. It was built based on in-depth review of literature and expert opinions that were obtained from phase 1 of the survey.

The measuring instrument had both open-ended and closed-ended questions (refer to Appendix 1). The themes were drawn from chapters 2 and 3 that focus on the effects of destination branding in relation to competitiveness and attractiveness. Respondents were allowed to develop their own answers from the open questions provided for in the questionnaire, while demand respondents were afforded options to choose from in the closed ended questions (Zikmund & Babin, 2013).

The following key sections were covered in the demand side questionnaire (refer to Appendix 1):

- **Section A – demographic profile**

The demographic section of the demand side questionnaire comprised characteristics such as age, gender, country of residence, highest level of education, income after tax and marital status of the respondents. The privacy of the respondents was protected in this section of the survey instrument. The objective of the demographic section was for the study to be able to determine the profile of the tourists that visit Zimbabwe as a destination brand. This information is critical for segmenting Zimbabwe's tourism market as well as developing destination brand messages.

- **Section B – travel behaviour**

This section dealt with the travel behaviour of tourists visiting Zimbabwe as a tourism destination. It gathered information relating to the number of visits made to Zimbabwe, the number of people in a group, length of stay, estimated expenditure, alternative tourism destinations, how tourists heard about Zimbabwe as a tourism destination and the reasons why tourists visit Zimbabwe. These behavioural attributes of tourists can be used by Zimbabwe Tourism Authority and tourism players in Zimbabwe to attract more arrivals to the country by way of establishing a competitive advantage. Some of the questions in section B were based on the research of Barros and Machado (2010); Gokovali, Bahar and Kozak (2006); Martinez-Garcia and Raya (2008) and Pike and Page (2014).

- **Section C – destination attractiveness**

This section of the questionnaire focused on the measurement of Zimbabwe's attractiveness, which Zimbabwe Tourism Authority and tourism suppliers can use to increase the country's tourist numbers and spending. This was measured by means of a 5-point Likert scale. Cooper and Schindler (2006:278) contend that the Likert scale is the most common and effective research tool that researchers can use to capture data on a larger scale. The attractiveness of Zimbabwe as a tourism destination was assessed using 5-point Likert scale which had the scale options of 1 = *strongly disagree*; 2 = *disagree*; 3 = *not sure*; 4 = *agree*; and 5 = *strongly agree*.

Aspects that were covered in section C of the demand side questionnaire include the destination's attractions, the destination's amenities, destination accessibility, destination ambience, destination environment and price attractiveness. The questionnaire was designed based on the research of Assaf and Josiasen (2012); Assaf and Tsionas (2015); Buhalis (2000); Crouch (2011); Dwyer and Kim (2003); Hassan (2000); Heath (2003); Mihalic, (2000, 2013); Page (2011); Pearce, (1979); Poon (1993); Prayag (2010) (c.f. Table 3.7; Table 4.2). Branding aspects were included as new aspects in a destination attractiveness assessment. The branding aspects focused on identity of the destination brand, image of the destination brand and destination brand loyalty. The use of multicurrency in a destination was also assessed for the first time in tourism literature. Table 4.2 indicates the final list of items that were used under section C of the demand survet to assess the attractiveness of brand Zimbabwe as a tourism destination, as well as the sources where they were proposed and measured.

Table 4.2: Source of questionnaire items used in destination attractiveness assessment

Variable	Various elements that measure the variable	Sources where this was proposed/measured
	the destination has unique natural attractions	Cooper, Fletcher, Gilbert and Wanhill (1993); Formica and Uysal (2006); Gelbman and Timothy (2011); Hong-Mei, Gou-Wei and Shun-Fen (2007); Reitsamer *et al.* (2016)

Attractions	the destination has unique built attractions	Formica and Uysal (2006); Gelbman and Timothy (2011); Reitsamer *et al.* (2016)
	the archaeological cultural attractions are excellent	Formica and Uysal (2006); Gelbman and Timothy (2011); Reitsamer *et al.* (2016)
	the historical cultural attractions are excellent	Formica and Uysal (2006); Gelbman and Timothy (2011); Reitsamer *et al.* (2016)
	the cultural festivals are unique	Formica and Uysal (2006); Gelbman and Timothy (2011); Reitsamer *et al.* (2016)
	the destination has unique handicrafts/souvenirs	Formica and Uysal (2006); Gelbman and Timothy (2011); Reitsamer *et al.* (2016)
	the way of life of local people is unique	Formica and Uysal (2006); Gelbman and Timothy (2011); Reitsamer *et al.* (2016)
	the level of hospitality and friendliness of the local people is excellent	Formica and Uysal (2006); Gelbman and Timothy (2011); Reitsamer *et al.* (2016); Vengesayi
	the language of the local people is unique	Formica and Uysal (2006); Gelbman and Timothy (2011); Reitsamer *et al.* (2016)
	the destination has unique icons	Formica and Uysal (2006); Gelbman and Timothy (2011); Reitsamer *et al.* (2016)
	the destination has many opportunities for social interactions with others	Formica and Uysal (2006); Gelbman and Timothy (2011); Reitsamer *et al.* (2016)
Amenities	the destination offers quality facilities	Buhalis (2000); Formica and Uysal (2006); Lee *et al.* (2010); Reitsamer & Brunner-Sperdin (2017); Vengesayi, 2005:641;

	the destination's tourism infrastructure - roads, airports, communication is excellent	Buhalis (2000); Formica and Uysal (2006); Lee *et al.* (2010); Reitsamer & Brunner-Sperdin (2017); Vengesayi, 2005:641;
	tourism support services for example foreign language interpretation, launderettes, postal and banking are excellent	Buhalis (2000); Dwyer and Kim (2003); Vengesayi (2003);
	the general services levels are excellent	Vengesayi (2003)
	accommodation at the destination is excellent	Lee *et al.* (2010); Formica & Uysal (2006)
	the cuisine of Zimbabwe is excellent	Mkono, (2010)
	the entertainment - night clubs, jazz and music performances are excellent	Hu & Ritchie (1993); Laws (1995)
	the retail outlets - shopping malls and centres, travel agents, etc. are excellent	Formica & Uysal (2006)
	sports and activities offered are excellent	Formica & Uysal (2006)
	the image of Zimbabwe is tourism friendly	Self-generated item
	the marketing of the destination is excellent	Self-generated item
	the exchange rate is favourable	Du Plessis *et al.* (2015); Dwyer and Kim (2003)
	the transport at the destination is excellent	Self-generated item
	the communication at the destination is excellent	Sparks *et al.* (2013); Vengesayi (2003)

Accessibility	the destination has good infrastructure in terms of airports, roads, railways and ports	Lee *et al.* (2010); Vengesayi (2003, 2008)
	it is easy to access the destination from my country of origin	Self-generated item
	the destination's airport route is available from my home country	Self-generated item
	the frequency of transportation (both air and road) to Zimbabwe makes it very accessible	Vengesayi (2008); Vigolo (2015)
	the prices charged for transport and tourism services are reasonable	Cracolici & Nijkamp (2008)
	the destination offers a variety of public transport vehicles	Vengesayi (2003)
	Zimbabwe is an innovative tourist destination	Self-generated item
	Zimbabwe has state of the art technology	Self-generated item
	the destination has visa policies that are tourism friendly	Vengesayi (2003)
	making reservations is easy	Vengesayi (2003)
	there is a wide access to tourist information	Vengesayi (2003)
	the drive time to Zimbabwe from my home country is short	Vigolo (2015)
	there is easy access to Wi-Fi/internet	Self-generated item

	the drive time between attractions is short	Self-generated item
Ambiance	the destination is vibrant	Reitsamer & Brunner-Sperdin (2017); Reitsamer *et al.* (2016)
	the destination's residents are friendly	Deng *et al.* (2002); Reitsamer & Brunner-Sperdin (2017); Reitsamer *et al.* (2016)
	the history and folklore of the destination is interesting	Deng *et al.* (2002);Reitsamer & Brunner-Sperdin (2017); Reitsamer *et al.* (2016)
	tourist services and amenities are delivered with courtesy	Cracolici & Nijkamp (2008)
	Zimbabwe offers a true African experience	Self-generated item
	the destination offers high levels of service delivery	Reitsamer & Brunner-Sperdin (2017); Reitsamer *et al.* (2016)
	the destination is committed to ensure safety of tourists	Kim (1998); Murphy *et al.* (2000)
	the destination has the ability to respond to the changing needs of the visitors	Kim (1998); Murphy *et al.* (2000)
	tourists have easy access to Wi-Fi and Internet services	Self-generated item
	tourism providers in Zimbabwe work together to offer improved products to tourists	Vengesayi (2003)
	Zimbabwe looks after its environment	Self-generated item
Price attractiveness	the level of sanitation and hygiene at the destination is very high	Kim (1998); Murphy *et al.* (2000)
	the prices of tourism services in Zimbabwe are competitive	Self-generated item

	the price of airport amenities (for instance parking fees and restaurants) are competitive	Kim (1998); Vengesayi (2003)
	the tax policies on tourist services (including Value Added Tax) are tourist friendly	Self-generated item
	the use of multi-currency in Zimbabwe reduces travel vacation costs	Self-generated item
	the destination offers value for money	Murphy *et al.* (2000)
	Zimbabwe has a price advantage when compared to other destinations I have visited	Self-generated item
Brand positioning	the destination's brand name (***Zimbabwe: A World of Wonders)*** is attractive	Self-generated item
	the destination's logo is attractive and enticing **(*see the top corner of the first page of the instrument*)**	Self-generated item
	the brand is associated with quality and good experience	Owusu-Frimpong, Nwankwo, Blankson and Tarnanidis (2013)
	Zimbabwe's value proposition captures my interest, hence the visit to the destination	Self-generated item
	the destination serves the needs of the visitors	Self-generated item
Brand identity	the destination's brand positioning, ***A world of Wonders,*** is attractive and appealing	Self-generated item

	I perceive Zimbabwe as an attractive destination brand	Self-generated item
	the destination's positioning statement (**A World of Wonders)** matches what I have experienced as a tourist	Self-generated item
	I have visited the destination because of its brand awareness programmes	Self-generated item
	the destination's brand identity is suitable for its target audiences	Self-generated item
Brand image	my visit to Zimbabwe was influenced by the image of the destination	Murphy *et al.* (2000); Prayag (2010); Lee (2009)
	my post-visit behaviour is likely to be influenced by the destination's brand image	Murphy *et al.* (2000); Prayag (2010); Vigolo (2015)
	the brand image influenced my choice of visiting Zimbabwe among competing destinations	Murphy *et al.* (2000); Prayag (2010; Vigolo (2015)
Brand loyalty	I intend to revisit Zimbabwe in the near future	Murphy *et al.* (2000) but these aspects have not been measured as an attractiveness determinant
	I will speak good about Zimbabwe to my friends and family	Murphy *et al.* (2000) but these aspects have not been measured as an attractiveness determinant
	I will recommend my friends to visit Zimbabwe	Murphy *et al.* (2000) but these aspects have not been measured as an attractiveness determinant

Source: Developed by author

4.6.2.2 Final supply side survey instrument and constructs operationalisation

The final supply side survey instrument was kept straightforward and concise. It was designed with the intention of getting an organisational profile of tourism and hospitality companies in Zimbabwe. Additionally, it was structured to determine the period in which they are busy as well as their opinions in terms of the competitiveness aspects of brand Zimbabwe as a tourism destination. The researcher designed the supply side questionnaire. It was built based on literature and opinions of experts obtained during phase 1 of the research.

The questionnaire had both open-ended and closed-ended questions (refer to Appendix 2). The themes were drawn from chapters 2 and 3 that focus on the effects of destination branding in relation to competitiveness and attractiveness. Just as in the demand survey, respondents were allowed to build their own responses based on open-ended questions that were included in the question. Additionally, respondents were also provided with options to choose from by means of closed ended questions (Zikmund & Babin, 2013).

The following key sections were covered in the supply side questionnaire (refer to Appendix 2):

- **Section A – organisational profile**

This section of the supply side questionnaire included aspects such as the tourism and hospitality category, years of operation, number of employees (both permanent and temporary), period when busy, percentage of repeat visitors, unique selling propositions of both Zimbabwe and the establishment, and the marketing mediums used by establishments. The names of participating organisations were protected in this section of the survey instrument. The aim of the section was for the study to be able to determine the organisational profile of tourism and hospitality companies in Zimbabwe.

- **Section B – destination competitiveness**

This section of the questionnaire focused on the measurement of Zimbabwe's competitiveness, which Zimbabwe Tourism Authority and tourism and hospitality

players can use to increase the country's competitiveness. This was measured by means of a 5 point Likert scale on the following scale options: 1 = *strongly disagree*; 2 = *disagree*; 3 = *not sure*; 4 = *agree*; and 5 = *strongly agree*.

The aspects that were covered in section B of the supply side questionnaire include what makes Zimbabwe competitive, level of tourist satisfaction, returns on destination branding investment, destination quality, human resources quality, destination attractiveness, destination management practices, destination brand management strategy, tourism infrastructure, price competitiveness, economic competitiveness, and moderating factors. The questionnaire was designed based on the research ofAssaf and Josiasen (2012); Assaf and Tsionas (2015); Barros and Dieke (2008); Crouch, Schultz and Valerio (1992); Hassan (2000); Kim (2012); Buhalis (2000); Kulendrana and Dwyer (2009); Mangion, Durbarry and Sinclair (2005); Mihalic, (2000, 2013); Page (2011); Poon (1993); Prayag (2010); Ritchie and Crouch (2003). Table 4.3 indicates the final list of items that were used under section C to assess the competitiveness of brand Zimbabwe as a tourism destination, as well as the sources where they were proposed and measured. Other measuring variables such as multicurrency, perception management, strategy effectiveness and the role of DMO in influencing output were also added to the measuring instrument.

Table 4.3: Source of questionnaire items used in destination attractiveness assessment

Variable	Various elements that measure the variable	Sources where this was proposed/measured
Overview of Zimbabwe's competitiveness	it is cheaper than other African tourism destinations	Buhalis (2000); Croes (2013); Dwyer and Forsyth, (2010); Ritchie and Crouch (2003); Vengesayi (2003)
	it offers unique products	Ritchie and Crouch (1993)
	Zimbabwe has world class icons	Self-generated item
	tourists are very satisfied	Blain *et al.* (2005); Hankinson, (2001, 2007, 2012); Hankinson and Cowking (1995); Morgan *et al.* (2004); Pike (2004)

	the return on investments in the tourism industry is very high	Buhalis (2000); Crouch *et al.* (1992); Dwyer *et al.* (2000); Kulendran and Dwyer (2009); Hassan (2000); Pike and Page (2014)
	destination quality guarantees tourism satisfaction	Chen, Chen and Lee (2010); Kozak and Rimmington (1999)
	of effective human resources	Vengesayi (2003)
	the attractions are of competitive quality	Ritchie and Crouch (1993); Crouch (2011)
	the general infrastructure is among the best in Africa	Vengesayi (2003)
	it has good tourism facilities	Vengesayi (2003)
	the destination offers value for money	Du Plessis *et al.* (2015); Du Plessis and Saayman (2017).
	the destination is well managed	Kozak and Rimmington (1999)
	the business environment supports tourism as an industry	Vengesayi (2003)
Levels of satisfaction	the destination brand delivers what was promised	Blain *et al.* (2005); Morgan *et al.* (2004); Pike (2004); Schaar (2013)
	the destination brand offers value for money	Du Plessis *et al.* (2015); Du Plessis and Saayman (2017).
	the destination brand use healthy business ethics	Self-generated item
	on-line comments shows high levels of satisfaction by tourists	Zheng , Youn and Kincaid (2009)
	Zimbabwe receives a high number of return visitors	Assaf and Tsionas (2015); Assaker *et al.* (2011); Heath (2003); Kulendran and Dwyer (2009); Ritchie and Crouch (2003)

	the destination enjoys a positive word-of-mouth referrals	Chen *et al.* (2010)
	post-visit comments about Zimbabwe are positive	Chen *et al.* (2010)
	tourists are satisfied with the attractiveness of the destination	Chen *et al.* (2010); Crouch and Ritchie (1995); Vengesayi (2003)
Return on destination branding investment	the rebranding of Zimbabwe, from Africa's Paradise to A World of Wonders has led to an increase in visitor numbers	Assaf and Tsionas (2015); Assaker *et al.* (2011); Heath (2003); Kulendran and Dwyer (2009); Ritchie and Crouch (2003)
	government expenditure towards the tourism industry is good	Balakrishnan (2009); Blain *et al.* (2005); Buhalis (2000); Pike and Page (2014); Ritchie & Crouch (1993)
	spending by tourists from target markets is very high	Assaker *et al.* (2011); Crouch and Ritchie (2003); Crouch (2006); Heath (2003); Kulendran and Dwyer, (2009)
	international competitiveness rankings have moved up since rebranding in 2011	Self-generated item
	tourists trust the new brand: ***Zimbabwe: A World of Wonders***	Self-generated item
	the new brand led to growth in market share	D'Hauteserre (2000); Hassan, (2000); Heath (2003); Perles-Ribes *et al.* (2014).
	spending made in terms of marketing Zimbabwe corresponds with visitor spending	Self-generated item

	tourists visiting the destination stay longer and spend more than before rebranding	Barros and Machado (2010); Fakeye and Crompton (1991);Crompton, Fakeye and Lue (1992); Gokovali *et al.* (2006); Martinez-Garcia and Raya (2008); Pike and Page (2014)
	events and festivals are effective for tourism growth	Heath (2003) and Lee and King (2009)
	more and more people are employed in the tourism industry	Assaker *et al.* (2011); Deskins and Seevers (2011); Heath (2003); Ritchie and Crouch (2003)
Destination quality	Zimbabwe offers quality ground and airport infrastructure	Assaf and Tsionas (2015); Gomezjl and Mihalic (2008)
	the human resources within the tourism industry are effective	Assaf and Tsionas (2015); Schaar, (2013); Vengesayi (2003)
	tourist receipts are an indication of destination quality	Assaf and Tsionas (2015); Croes, (2013); Pike and Page (2014); Vengesayi (2003)
	destination enjoys good Wi- Fi and internet connectivity	Assaf and Tsionas (2015)
Quality human resources	the quality of educational system in Zimbabwe contributes to tourism competitiveness	Ritchie and Crouch (2010); WEF (2015)
	there is high local availability of specialised research and training within the tourism industry	WEF (2015)
	destination competitiveness depends on the extent of tourism staff training	WEF (2015)
	Zimbabwe has qualified tourism and hospitality staff	Woyo (2013)

	Zimbabwean tourism employers prefer to hire foreign labour	WEF (2015)
Attractiveness of Zimbabwe	visitors feels safe in Zimbabwe	Reitsamer *et al.* (2016:93); Bahar and Kozak (2007)
	unique local cuisine appeals to the international tourism market	Guan and Jones (2015)
	destination is visually appealing	Ritchie and Crouch (2010); Vengesayi (2003)
	destination has well known destination landmarks and icons	Formica and Uysal (2006); Gelbman and Timothy (2011); Reitsamer *et al.* (2016)
	destination's nightlife appeals to the international tourism market	Formica and Uysal (2006); Gelbman and Timothy (2011); Reitsamer *et al.* (2016)
	destination's different cultures has a strong international appeal	Formica and Uysal (2006); Gelbman and Timothy (2011); Reitsamer *et al.* (2016)
	special events and festivals like the Carnival, Harare International Festival of the Arts, etc. have strong international appeal	Self-generated item
	destination has interesting architecture	Formica and Uysal (2006); Gelbman and Timothy (2011); Reitsamer *et al.* (2016)
	destination has good climate and weather	Formica and Uysal (2006); Gelbman and Timothy (2011); Reitsamer *et al.* (2016)
	destination has unique history	Formica and Uysal (2006); Gelbman and Timothy (2011); Reitsamer *et al.* (2016)
	quality museums and monuments	Formica and Uysal (2006); Gelbman and Timothy (2011); Reitsamer *et al.* (2016)

Destination management practices	there is high stakeholder accountability	Klimek (2013); Mihalic (2000) Zehrer, Smeral & Hallmann (2017);
	private sector's support towards the tourism industry is good	Alford (1998); Vengesayi (2003)
	the community's support towards sustainable tourism is good	Mkono (2010)
	there is effective coordination and alliances of key operators in the tourism industry	Vengesayi (2003)
	there is a good provision of tourism information	Vengesayi (2003)
	Zimbabwe Tourism Authority is effective in monitoring and evaluating the performance of the tourism industry	Self-generated item
	Zimbabwe Tourism Authority conducts periodic and systematic marketing and destination branding research	Self generated item
	the tourism industry is innovative; always producing new products	Self generated item
	there is high level of commitment towards the development of a favourable destination image by concerned players	Venegsayi (2003)
Effectiveness of brand management strategy	the destination managed to position itself as a "*A World of Wonders*"	Self-generated item
	the destination is now attracting more high spending tourists after rebranding	Assaf & Tsionas (2015); Assaker *et al.* (2011); Heath (2003); Kulendran and Dwyer (2009); Ritchie and Crouch (2003); Pike and Page (2014);

	rebranding of Zimbabwe improved the destination's image	Ndlovu and Heath (2013); Schaar (2013)
	the destination managed to attract tourism investors after rebranding	Ndlovu and Heath (2013)
	destination branding objectives are being met	Self-generated item
	tourism outputs such as arrivals, length of stay, market share, employment etc., have been rising due to rebranding	Barros and Machado (2010); Crompton (1991); Martinez-Garcia and Raya, (2008); Pike and Page (2014) Gokovali *et al.,* (2006)
	destination brand loyalty is on the rise as indicated by repeat visitor intentions and social media generated comments	Self-generated
	destination marketing communication programmes have been successful in dealing with perception management	Self-generated item
	social media use at destination is effective for perception management and brand image building especially with modern tourists	Munar and Jacobsen (2013); Sparks *et al.* (2013); Xinag and Gretzel (2010)
	travel trade events hosted in recent years have been effective in bringing tourism business	Burger (2015)
	brand ambassador programmes launched since 2006 have been effective in generating tourism business	Self-generated item
Price competitiveness	the use of multi-currency in the economy adopted in February 2009 has positive effect on travel	Self-generated item

	destination's pricing is cheaper than that of the source markets	Buhalis (2000); Croes (2013); Dwyer and Forsyth, (2010); Ritchie and Crouch (2003); Vengesayi (2003)
	the visitors to Zimbabwe are price sensitive/elastic	Dwyer *et al.* (2010)
	the destination has favourable tax policies on tourism services (including Value Added Tax)	Self-generated item
	overall prevailing economic conditions makes Zimbabwe to be price competitive	Self-generated item
	destination's prices affects the long haul market potential negatively	Vigolo (2015)
Politics and policies	the destination's visa policies promotes tourism	Dupeyras and MacCallum (2013); Ritchie and Crouch (2010, 2003)
	the destination and its main attractions are highly accessible	Lee *et al.* (2010); Vengesayi (2003)
	destination is politically stable	Dwyer and Forsyth (2011); Mazurek (2014); Ritchie and Crouch (2003); Vengesayi (2003)
	there is political will in building a competitive and attractive destination brand	Vengesayi (2003); Wang and Pizam (2011)
	assumed level of corruption affects Zimbabwe's competitiveness	Self-generated item
	print and electronic media, both in and outside the destination helps in projecting a competitive and attractive destination brand	Self-generated item

Prosperity and investments	there is evidence of prosperity of destination residents	Boley and Perdue (2012); Buhalis (2000); Dwyer and Forsyth (2011);Dwyer *et al.* (2000); Enright and Newton (2004); Heath (2003); Krugman (1996);Ritchie and Crouch (2003);
	there is evidence of increased contribution towards GDP by the tourism industry	Chou (2013)
	the destination is able to attract Foreign Direct Investment	Buhalis (2000); Dwyer *et al.* (2010)

Source: Developed by author

4.6.2.3 Reliability of survey instruments

Reliability is measured as the closest that the data collected can be generalised from the population sample onto the whole population (Cooper & Schindler, 2006:260). McDaniel and Gates (2013:286) define reliability as a measurement scale that has the ability to provide researchers with consistent results over time. Additionally, it also refers to the degree to which a measurement scale is deemed free from random errors and consequently provides consistent results if repeated measures are made on the same concept (Malhotra, 2010:318; McDaniel & Gates, 2013; Zikmund & Babin, 2013:286). It is imperative to note that reliability is commonly considered an essential influence of validity (Cooper & Schindler, 2006:260), though it is not an end in itself.

It is commended that one examines the reliability of the captured data as this measures the internal consistency of the survey instrument used (Zikmund & Babin, 2013; Zikmund *et al.,* 2010:305). Iacobucci and Churchill (2010:258) note that reliability refers to the examination of whether a relationship between two measures of the same concept is present when two different researchers use the same measuring instrument. The reliability of measuring instruments was determined as a way of confirming whether the questions were related with each other or not.

Cronbach's Alpha's coefficient (α) was employed to measure the reliability of both the destination attractiveness and destination competitiveness dimensions. The coefficient is widely accepted as a reliability analysis tool in marketing sciences literature (Malhotra, 2010; McDaniel & Gates, 2013; Zikmund & Babin, 2013). Therefore, the Cronbach's alpha coefficient was deemed appropriate for this study.

The range of the Cronbach's Alpha coefficient is 0 to 1. It is important to note that Malhotra *et al.* (2013:318) argue that in circumstances where the value of Alpha is between 0.8 – 0.95, the reliability measure would be deemed as very good; in instances where Cronbach's Alpha ranges between 0.7 – 0.79, the reliability measure would be deemed good. According to Zikmund *et al.* (2010:305) and Malhotra *et al.* (2013), an Alpha coefficient that ranges from 0.6 -0.69 is deemed fair while any coefficient loading that is less than 0.59 is considered poor (Zikmund *et al.,* 2010:306). The alpha coefficients of destination attractiveness factors ranged from 0.53 to 0.89. Only one destination attractiveness factor had a reliability coefficient that was less than 0.59. Destination competitiveness factors had reliability scores that ranged from 0.51 to 0.92. Only 3 destination attractiveness factors failed to go beyond 0.59. All the dimensions of destination attractiveness and destination competitiveness were above 0.50. Therefore, the reliability of the measuring instruments that were developed for this study was supported.

4.6.2.4 Validity of survey instruments

Both demand and supply data were subjected to separate factor analyses as a means of testing the validity of the data. Exploratory factor analyses were used in this study to evaluate the factorial validity of the survey instruments that were employed in this survey. Leedy and Ormrod (2005:92) define the validity of a measuring instrument as the extent to which the instrument measures what it intended to. Therefore, validity determines the precision with which the measurement of variables took place. Therefore, validity is essential to denote an honest score and concept (Iacobucci & Churchill, 2010:256; Malhotra, 2010; Zikmund & Babin, 2013:259; Zikmund *et al.,* 2010:307). Accordingly, Zikmund and Babin (2013:258) argue that it addresses the problem of whether the instrument has essentially measured what it was supposed to measure. In essence, it is assessed in numerous ways that often include factorial validity, content validity, and criterion related validity and construct validity.

Renauld and Murray (2005:933) define factorial validity as the factor structure of the survey instruments that makes intuitive sense. The extent to which the study's results apply to circumstances that are beyond the study itself is defined as external validity (Leedy & Ormrod, 2005:99). It therefore means that conclusions that are drawn from the study can be generalised in other contexts. This study used a large sample for demand and supply so that the results can be generalised to tourism destinations that have similar characteristics with Zimbabwe. The Bartlett's test of sphericity was used in this study to determine whether the correlations between variables that were examined in both the demand and supply surveys do not differ significantly from zero. The test in this study reached statistical significance of 0.000 and it implies that it supported the factorability of the correlation matrices of demand and supply data. The study also used the Kaiser-Meyer-Olkin (KMO) test as a measure of the sampling adequacy. All the KMOs generated values that were greater than 0.5, a value that is recommended as adequate in literature (Field, 2000:446). Therefore, factorial validity of the survey instruments and their variables was supported in this study.

The precision and representation of the measuring task is clarified by means of content validity (Aaker *et al.,* 2011:269; Iacobucci & Churchill, 2010:257; McDaniel & Gates, 2013:290). Content validity has biased undertones, given that specialists and people conversant with the topic under study comprehend and construe it differently despite claims by Malhotra (2010:320) that content validity remains a methodical assessment of how well the scale contents represent the measurement task at hand. As outlined previously under phase 1 of empirical research, the panel of experts drawn from academia and the tourism industry served as "judges" in assessing the instrument's content validity.

McDaniel and Gates (2013:292) point out that criterion validity tends to replicate with meaningful performance the relationship between selected variables. Zikmund and Babin (2013:258) discuss that the aim of criterion validity is to determine if the data collected associates with other standard measures of a similar construct. The questionnaires employed in the survey were designed using information that was gathered by means of review of literature (c.f. Chapters 2 & 3), which indicated the outcomes of destination branding in relation to destination competitiveness and attractiveness.

The construct measured by the study constitutes construct validity (Iacobucci & Churchill, 2010:257). Consequently, construct validity demonstrates the magnitude to which the questionnaire as a measuring instrument endorses the study's hypothesis that was generated from theory based on the data collected (McDaniel & Gates, 2013:290), of which both theory and data were analysed in this study. Conversely, the challenge that comes with construct validity is that it tends to lay in the unnoticeable nature of numerous constructs such as attitudes (Aaker *et al.,* 2011:269). Construct validity was reinforced in this study given that both theory and empirical data were examined and discovered that items and constructs were measured aptly. Construct validity was achieved by means of exploratory factor analyses of demand and supply.

4.6.3 Empirical survey – phase 2 of the research

The second phase of the empirical survey was principally concerned with the assessment of the survey items that were reduced through the pre-test. Validity and reliability of data were determined during this phase. Development of a destination competitiveness and attractiveness assessment framework for brand Zimbabwe as a tourism destination was the study's main goal. This section of the chapter discusses the sampling, data collection and data coding techniques that were employed in the empirical survey. The next section discusses the sampling procedure.

4.6.3.1 Demand side sampling procedure

The demand population was drawn from international tourists who visited Zimbabwe between 21 November 2016 and 17 January 2017. According to ZIMSTAT (2016), 2.1 million people visited Zimbabwe in 2015. The survey focused on tourists that visited popular tourism destinations in Zimbabwe such as the Victoria Falls, Eastern Highlands, Great Zimbabwe and Harare. Krejcie and Morgan (1970:608) developed guidelines for defined population. As a result, the sample size was determined using their guidelines. A known population of study that has (*N)* = 1 000 000, the sample size of (*S)* =384. A minimum sample size of 200 to 300 respondents is recommended for quantitative studies (Orme, 2010; Boomsma & Hoogland, 2001). The number of tourists visiting Victoria Falls, Harare, Eastern Highlands and Great Zimbabwe were taken into account in the determination of the study's sample size. Approximately a million visitors visit these four tourism destinations per annuam (ZIMSTAT, 2016). It was, therefore, determined that 500 questionnaires would be sufficient for the demand

side to make provision for spoilt and uncompleted questionnaires. 450 were returned with usable responses and were thus used for analysis.

The demand survey employed both the probability and non-probability sampling techniques. Stratified probability sampling was firstly employed in the study to divide the population into strata/groups. Therefore, tourists were divided into two major groups that is, local/national tourists and international tourists. Zimbabwe as a tourism destination was also divided into strata that resulted in having four popular tourism destinations based on tourism arrivals. The four tourism destinations informed the basis of this study. As a result, the survey focused on international tourists who visited Zimbabwe's Victoria Falls, Great Zimbabwe, Harare and the Eastern Highlands as sub-groups. These destinations were chosen because they are popular based on the tourist numbers they receive per year (ZIMSTAT, 2016). Moreso, these tourism destination were selected for this study because they part of the primary reference of the current brand, ***Zimbabwe: A World of Wonders.*** Local or national tourists were, therefore, excluded in this study. Both the researcher and fieldworkers asked the tourists first if they were local or international before administering the survey instruments for completion. Only tourists who indicated that they were not from Zimbabwe were given questionnaires to complete. Local tourists were excluded in the study because the researcher felt they will not give a fair assessment with regard to how competitive and attractive brand Zimbabwe is as a tourism destination.

Secondly, convenience sampling was employed for international tourists who visited these areas, due to the fact that they were conveniently accessible to the researcher and the field assistants. Demand side respondents were requested to complete demand questionnaires at their convenience. Every third tourist was asked to participate in the completion of the questionnaire. This was determined as tourists were visiting the major attractions in the tourism destinations that were focused in this study. Moreso, it was also done when tourists were being driven back to the airport on their departure dates, thus, the researcher and the field assistants will ask every tourist seating on the 3rd row in the bus to complete the questionnaire. In cases where tourists were in groups, only one person in the group was requested to complete the questionnaire.

4.6.3.2 Supply side sampling procedure

Just like the demand survey, the supply survey also followed a stratified sampling procedure and a convenience sampling. The tourism and hospitality establishments were first divided into groups by location just as the demand survey. The list of establishments includes hotels, national parks, airlines, restaurants, DMOs, tour operators, transport operators, heritage organisations, and tourism services and so on. The numbers of establishments are higher in Victoria Falls, Harare, Great Zimbabwe and the Eastern Highlands. In addition, the establishments were further divided into groups by nature of operations/business.

Convenience sampling was employed for operators that agreed to participate in this study due to these being accessible to the researcher and the field assistants. The Zimbabwe Tourism registration database of all tourism and hospitality organisations, as of September 2016, had 1281 operators in different categories (ZTA, 2016). The sample size in respect of the supply side was based on the same Krejcie and Morgan (1970:608) guidelines. The guidelines state that for a population (N) of 1300, the required sample size is (S) = 297. It was, therefore, determined that 320 questionnaires would be sufficient for the supply side. A total of 301 questionnaires were completed by the managers of establishments as well as those who were seconded by management to complete the questionnaires. All the 301 fully completed questionnaires captured using Microsoft Excel 2016 for analysis.

4.6.3.3 Data collection

Churchill and Brown (2007:41) define the collection of data as "a process of gathering and measuring information on variables of interest". This process is conducted in a manner that is systematic and aids the research to answer research questions pertaining to the study. It also helps in testing the study's hypothesis. Tashakkori and Teddie (2003:303) note that the techniques that one can use in the data collection process can vary from one field to the next depending on the nature of the study. Accuracy and honesty are key elements that are emphasised in data collection (Creswell, 2007:25). This study used questionnaires to collect data from demand and supply perspectives.

4.6.3.3.1 Data collection for demand

Demand data were gathered through the use of questionnaires administered by the researcher and research assistants. The survey was carried out in Victoria Falls, Great Zimbabwe, Harare and the Eastern Highlands. Research assistants were employed to distribute demand questionnaires in Harare and the Eastern Highlands, while the researcher collected data in Victoria Falls and Great Zimbabwe. The research assistants that were used in Harare and Eastern Highlands were prepared and instructed on the purpose and the essence of the research. Additionally, the researcher also taught the research assistants how to approach and explain the aspects of the questionnaire to respondents.

500 questionnaires were distributed between 21 November 2016 and 17 January 2017. Of the 500 questionnaires, 215 were distributed in Victoria Falls, 125 in Harare, 80 in the Eastern Highlands and 80 at Great Zimbabwe and its environs. This distribution of survey instruments was also based on the tourism arrivals that each destination receives per annum. Generally, Victoria Falls gets more tourists, followed by Harare and Great Zimbabwe and Eastern Highlands (ZIMSTAT, 2016). 468 completed questionnaires were returned. However, 450 had usable responses and were completely filled and were therefore used in data capturing and analysis.

4.6.3.3.2 Supply side data collection

Data for supply gathered through the use of a questionnaire. The questionnaire was administered and distributed to the respondents by the researcher and research assistants. The survey was carried out in Victoria Falls, Great Zimbabwe, Harare and the Eastern Highlands. A total of 320 questionnaires were administered between 21 November 2016 and 17 January 2017. Of these 320 questionnaires, 130 were distributed in Victoria Falls, 90 in Harare, 50 at Great Zimbabwe and its surroundings, and 50 in the Eastern Highlands. Establishments that were considered small by the researcher/field assisstants were given 3 questionnaires to complete, while bigger establishments were given between 5 and 8 questionnaires to complete. There are more estabishments in Victoria Falls than in Harare (ZTA, 2016), and as a result more survey instruments were distributed in Victoria Falls. This was followed by Harare. However, Great Zimbabwe and Eastern Highlands do not have as many establishements are there are in Victoria Falls and Harare, hence fewer questionnaires

were administered. A total of 301 were returned fully completed and were used in data capturing and analysis.

4.6.3.3.3 Ethical considerations

The need for ethics in research cannot be over emphasised. Ethics refers to the morals, principles and values that govern the way one conducts himself/herself (Churchill & Brown, 2007:41). Consent and confidentiality are key research ethics considerations (Leedy & Ormrod, 2005:100). In addressing the aspect of consent, research must be able to protect the respondents from harm (Patton & Cochran, 2002). Anyone who participates in a study should do so without being coerced or unfairly pressurised. It implies that respondents should be well informed about what participation entails. It is also essential to protect the identity of participants and ensure them that the information obtained is going to be used for intended purposes only. In upholding this ethical practice of research, the intention of the study was explained to demand and supply respondents by the researcher and the research assistants before respondents participated in the survey. Additionally, the study did not ask the names of the respondents/establishments. The questionnaire also did not ask the physical address of the respondents. The raw data were used for the stated research purposes and not any other purpose.

4.6.4 Data coding

According to Gibbs (2002:128), data coding is the process whereby the researcher examines the raw data. Raw data takes the form of phrases, words, paragraphs and sentences and so on. During the process, the researcher must allot labels and codes. Therefore, it is a process that requires one to transform data points on survey instruments into a set of numbers that can be comprehended by a statistical programme. In the case of this study, the programme used was Statistical Package for Social Sciences (SPSS). Strauss and Corbin, (1990:326), note that coding of data hinges on data analysis to be performed and the requirements of the statistical programme one intends to use. Data coding was, therefore, important for this study that followed a quantitative analysis. Therefore, for this study, collected data (both demand and supply) were coded by assigning numbers to each response; for example all questions with answers strongly agree to strong disagree were replaced by 1,2,3,4,

and 5 depending on the answer. In addition to this, all the returned questionnaires were also numbered.

4.7 STATISTICAL DATA ANALYSIS

The researcher used Microsoft Excel to capture data, perform data cleaning and to conduct descriptive analysis. Data was originally analysed to comprehend the profile of demand and supply side respondents using descriptive statistics. Frequency tables were, therefore, extracted using Statistical Package for Social Sciences version 24.0. The North-West University (Potchefstroom Campus)'s statistical consultation services were employed for processing demand and supply raw data into usable information that was used for further statistical analysis.

The researcher interpreted the statistical information. The study used various statistical analyses to analyse the data and assess the competitiveness and attractiveness of brand Zimbabwe as a tourism destination. Statistical analyses that were conducted for the demand side (destination attractiveness) include:

- descriptive statistics,
- exploratory factor analyses,
- independent *t*-tests,
- One way analysis of variance (ANOVAs),
- Spearman's rank order correlations and
- Regression analyses.

For the supply side (destination competitiveness), statistical analyses that were conducted include

- descriptive statistics,
- exploratory factor analyses,
- One way analysis of variance (ANOVAs)
- Spearman's rank order correlations; and
- Regression analyses.

An overview of the statistical analyses that were employed in this study is provided in Table 4.4.

Table 4.4: A summary of statistical analyses employed in the study

Type of statistical analysis	Demand Survey	Supply Survey
Descriptive analysis	Frequency tables and graphs to describe demographic profile of tourist; tourist motivations and travel behaviour	Frequency tables were used to describe organisational profile, years of operations etc.
Exploratory Analysis	Factor analysis	Factor analysis
Inferential analysis	*P*-values and effect sizes were used together with ANOVAs, independent *t*-tests. *p*-values were applied to correlations of destination attractiveness factors	*P-values* and effect sizes were used together with ANOVAs. The *p*-values were also applied to correlations of destination competitiveness factors
Causal Analysis	*T-tests*, ANOVAs, Spearman rank order correlations and multiple stepwise regression analyses were applied.	ANOVAs, Spearman Rank order correlations and multiple stepwise regression analyses were applied.

Source: Developed by author

4.7.1 Descriptive statistics analysis

In practice, researchers frequently use descriptive statistics when discussing a single variable or the way a particular variable tends to associate with another variable (Babbie, 2013:460; Cooper & Schindler, 2006:656). On the one hand, the aim of demand descriptive statistics analysis in this study was to provide the demographic profile of demand respondents by looking at aspects such as gender, age, continent of residence, level of education, income and marital status as well as their travel behaviour patterns. On the other hand, descriptive statistics for supply was aimed at providing the profile of supply side respondents with regard to categories of establishments, length of operation, number of employees (permanent and

temporary), percentage of repeat business, unique selling points of establishments and destination and marketing mediums used by tourism establishments in Zimbabwe.

As previously mentioned, descriptive statistics, though they do not enable conclusions, are essential in data analysis and presentation. Blumberg, Cooper and Schindler (2011:45) assert that descriptive statistics is at the heart of all quantitative research findings. Data for this study was first subjected to a descriptive analysis in order to establish patterns before an inferential analysis was conducted. Graphs and tables were used to display the results. Frequency tables were compiled using Microsoft Excel to offer a synopsis of the empirical distribution of variables (Huzingh, 2007:205; Ross, 2010:18). The descriptive statistics results for demand are deliberated better in Chapter 5 of this study while descriptive statistics for supply are deliberated in greater detail in Chapter 6 of this study.

4.7.2 Inferential statistical analysis

Inferential statistics is a branch of statistics that is generally concerned with making inferences (decisions, estimates, predictions or generalisations) about a population of measurement, based on information that is contained in a sample of data taken from the population in question (Scott, 2009:429). Therefore, inferential statistics were used in this study to measure significance (Marshall & Jonker, 2011:17). On the one hand, this was done to measure if the difference between destination attractiveness factors and other variables were as a result of chance or the real effect of a test (Marshall & Jonker, 2011:17). On the other hand, this was also done to measure if the difference between destination competitiveness factors and other variables were as a result of chance or the real effect of a test.

The p-values and effect sizes were employed in this study. A p-value of $p < 0.05$ indicates that the mean values are of statistical significance, while a p-value of $p > 0.05$ indicates that there are no significant differences. According to Cohen (1988) cited in Gignac and Szodorai (2016:74), effect sizes are categorised as:
- <0.1 explains trivial effect;
- 0.1 – 03 explains small effect;
- 0.3 – 0.5 explains moderate effect;

- >0.5 explains quite a large effect.

Effect size reports practical significance, whereas *p*-value reports the statistical significance (Chatfield, 1995 cited in Khalilzadeh & Tasci, 2017:90; Ellis & Steyn, 2003). Sullivan and Feinn (2012:279) argue that the effect size is the main finding of a quantitative study. Effect size is, therefore, a simpler way of quantifying the differences between two groups and produces a better advantage over the use of test of statistical significance alone. While *p*-values are able to inform research that an effect exists, they are not able to reveal the size of the effect (Sullivan & Feinn, 2012:279). It was important for this study to report and interpret both the practical significance by means of effects sizes and statistical significance by means of *p*-values. Khalilzadeh and Tasci (2017:91) note that effect size is less biased toward sample size, and therefore was considered to be reliable in this study due to the large sample size that was employed.

Effect sizes were employed in this study together with *p*-values during independent *t*-tests and One-Way Analysis of Variances (ANOVAs). Effect sizes were derived by means of deducting the variables' mean scores and dividing the value with the highest standard deviation (Lai & Kwok, 2016:747; Sullivan & Feinn, 2012:729; Vacha-Haase & Thompson, 2004:473). The emphasis of effect size is that of the difference rather than confounding this with sample size. Sullivan and Feinn (2012:279) argue that statistical significance is a probability of chance, and assuming that *p*-value is higher than the alpha that has been chosen (*p-value = 0.05),* sampling variability is, therefore, assumed to explain the observed difference. Statistical tests are always deemed to demonstrate significant differences unless there is no effect; that is, when the effect size is zero, small differences, even if significant are often meaningless (Sullivan & Feinn, 2012:280). Therefore, only reporting of statistical significant *p*-values for this study was considered unsatisfactory for directing and influencing policy in relation to destination branding and destination attractiveness and competitiveness in Zimbabwe.

4.7.2.1 Exploratory factor analyses

Factor analysis is a multivariate statistical tool that researchers use to group a large number of similar variables into smaller number of subsets, called factors through the identification of underlying dimensions of data for the ease of managing variables

(Bradley, 2007, 2013:32; Malhotra *et al.,* 2013:897; Malhotra, 2010; McDaniel & Gates, 2013:560). Factors are usually independent and are examined according to their different relationships (Malhotra *et al.,* 2013). Through exploratory factor analyses, the researcher is able to run a summary of the original set of variables and determine the different associations between variables (Cooper & Schindler, 2006:533; Malhotra *et al.,* 2013). Exploratory analysis, however, does not clarify the variance regarding dependent and independent variables, as all the variables under study are explored together to categorise important factors (Hair *et al.,* 2010:590). Additionally, exploratory factor analysis is used to classify variables or elements that fit together and as a result it inspects the degree of correlations between a set of variables in relation to one or more underlying latent variables (Aaker *et al.,* 2011:396; Malhotra, 2010:636; Pallant, 2010:181).

In this study, exploratory factor analyses were used as an antecedent of the further statistical analysis such as correlations, ANOVAs and multiple stepwise regression analyses that were conducted to classify the causal variables of destination competitiveness and attractiveness of Zimbabwe as a tourism destination brand. The researcher elected to employ the use of exploratory analyses to advance a better comprehension of what the likely competitiveness and attractiveness factors for Zimbabwe as a tourism destination might be. This grasp of destination competitiveness and attractiveness factors would endow Zimbabwe Tourism Authority and other policy-makers the ability to manage Zimbabwe effectively and efficiently as a tourism destination. The factors were further analysed using stepwise regression as a way of determining the most significant contributors of destination competitiveness and attractiveness (Iacobucci & Churchill, 2009:60).

Principal component analysis (PCA) using Oblimin with Kaiser Normalisation rotation method was applied to both demand and supply exploratory analyses that were performed. From the exploratory analyses, on the one hand, 11 destination attractiveness factors were recognised and labelled based on key themes that emerged from the review of literature. On the other hand, 14 destination competitiveness factors were identified and labelled based on dominant themes that emerged from review of literature. The usefulness of the demand and supply factor analyses were determined through Kaiser-Meyer-Olkin (KMO) measure of sampling

adequacy. KMO values that are closer to 1.0 show that the patterns of correlation are comparatively solid and produce distinctive and consistent factors (Field, 2013:684). The study used only factor elements that had eigenvalues that were greater than 1. Eigenvalues greater than 1 provide a significant explanation with regard to the variation amount of the data. The study factor loading guidelines of Stevens (2002:393) were followed, implying that only factor loadings that were greater than 0.30 were used. In the case of factors that cross-loaded, the researcher determined the group in which they were best explained. Cronbach's alpha coefficient was also calculated for each factor and all the demand and supply factors had reliability coefficients that were greater than 0.50. The study also computed the inter-item correlations for the factors. Inter-items are also a part of the reliability measure that can be used in research. Values that range from 0.15 to 0.55 are acceptable for analysis (Clark & Watson, 1995).

4.7.2.2 Rank order correlations

Correlations are used to describe the linear relationships between two variables. They also explain the degree to which a change in the dependent variable will influence changes in the independent variable (Malhotra, 2010:562; McDaniel & Gates, 2013). The correlation coefficient denoted by (r) ranges from -1 to +1, with 0 representing no association between variables. The closer the value of r is to +1, the stronger the positive correlation; and the closer r is to -1, a negative correlation may exist. Perfect correlation is found when the value is +1 or -1. Perfect relationship among variables is shown by means of a straight line when using a scatter plot.

Spearman's rank correlations were computed to elucidate the strength of relationships between destination attractiveness factors and the co-variances they share (c.f. Chapter 5). Additionally, the Spearman's rank order correlations were also applied in this study to explain the strength of relationships between destination competitiveness factors (c.f. Chapter 6). The empirical results showed that a number of correlations between destination attractiveness were significant at *p =0.00* with small, to medium to high correlations between the factors (refer to Chapter 5). The same can be said for destination competitiveness (refer to Chapter 6). It must be noted that, while correlations are able to explain the associations between variables, it cannot do the

same for causation; thus, the correlational relationships were further studied in the regression analyses framework of this study.

4.7.2.3 One Way Analysis of Variance (ANOVA)

One Way analysis of variance (ANOVA) is a statistical analysis tool that is used in research to determine variations between dependent variables and independent variables (Cooper & Schindler, 2006:454; Creswell, 2014:178; Malhotra *et al.,* 2013:521). The aim of running ANOVAs in any study is to determine whether statistical significant differences in means between multiple groups occur (Creswell, 2014; Hair *et al.*, 2010:281; Malhotra *et al.,* 2013:521). For instance, using the demand side instrument, the continent of residence (independent variable) was subdivided into six classes (Africa, North America, Asia, Europe, Australia/Oceania and South America) such that the differences between these six groups regarding their assessment of destination attractiveness in Zimbabwe can be examined. Generally, ANOVAs are often deemed an appropriate technique because of their ability to compare means between two or more groups, unlike *t*-tests that evaluate the variances concerning the means of two groups only.

For the demand survey, ANOVAs were used to examine any statistical differences between tourists' continent of residence and length of stay, on the identified variables predictive of destination attractiveness. These factors were also identified in the exploratory factor analyses. For supply, ANOVAs were used to examine statistical and practical significance between tourism and hospitality establishments and identified destination competitiveness factors.

4.7.2.4 Independent *t*-test analyses

Independent *t*-tests are statistical analyses done to examine the statistical differences that exist concerning mean scores of only two groups on a continuous variable (Zikmund & Babin, 2013:390). The study used *t*-tests to assess whether the means between male and female tourists were statistically different. Independent *t*-tests are appropriate in circumstances where one needs to make a comparison of the means of two groups (William, 2006:1). According to Bhattacharyya (2006:126), *t*-tests evaluate whether the mean values of the test variables for one group is different from the mean values of the test variable for the second group. The mean scores of female

and male tourists' perceptions with regard to brand Zimbabwe's competitiveness and attractiveness were evaluated.

4.7.2.5 Regression analyses

Regression analysis is a quantitative technique of research employed when modelling and examining numerous variables. It is a set of statistical techniques that allows a researcher to measure the "relationship between one dependent variable and several independent variables" (Tabachnick & Fidell, 2007:117). In its basic form, regression modelling uses the following parameters:

- *(β)* as an unknown parameter;
- *(X)* as the study's independent variable; and
- *(Y)* as the dependent variable of the study.

Based on these parameters, the regression model explains the relationship with regard to the study's *Y* variable to a function combination of the *X* variables of the study, together with *(β)*. According to Allison (2014), regression serves two main uses. Firstly, it is used to predict and secondly, it is used to explain causality. In its predictive use, the objective is to model formulas that can be applied in predicting the dependent variable based on the independent variable. The second use of regression modelling is causality. Its major objective is to determine whether the independent variable causes the dependent variable. It also estimates the magnitude of the effect of the cause.

Regression techniques consist of sequential regression (hierarchical), standard multiple regression, and statistical regression (stepwise) (Tabachnick & Fidell, 2007:118). The differences between these regression modelling techniques involve the way variables were entered in the regression equation (Tabachnick & Fidell, 2007:118). This study followed the stepwise regression modelling technique in investigating the relationship between destination attractiveness factors and destination brand loyalty. In the context of supply, stepwise analysis was used to investigate the relationship between destination competitiveness factors and economic competitiveness. The stepwise regression analyses were used in this study such that each predictor variable could be correlated with the outcome while controlling for the effects of the other predictor variables (Field, 2005). Therefore,

stepwise regression analyses were employed to find the best prediction equations for some phenomenon (Tabachnick & Fidell, 2007:118).

4.8 CONCLUSIONS

The aim of the chapter was to discuss the method of research that was followed by the researcher in an attempt to achieve the objectives set for this study. Method of research features discussed in this chapter include: research methodology, research philosophy, research design, importance of literature review, organisation of empirical survey, population, sampling techniques and sample size, development of the measuring instruments and the statistical analysis techniques that were used. The development of survey instruments was based on previous research studies in similar setups. Numerous sources were reviewed in order to come up with the questionnaires that were used in this study. Justification for following a quantitative method of research was also explored and the main advantages of using it were discussed.

Both inferential and descriptive statistics used in the study were explained. Stepwise multiple regressions for predicting destination brand loyalty were based on destination attractiveness factors. For the supply side, stepwise regression was used to predict the significant contributors of economic competitiveness based on identified significant destination competitiveness factors. The chapter concludes by explaining the importance of ethics in research.

The next chapter will focus on the research findings of the study that were obtained from the demand survey. The chapter will present the findings of both inferential and descriptive statistics and link the results to previous studies in the same area.

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CHAPTER 5

EMPIRICAL RESULTS OF DEMAND

Things get done only if the data we gather can inform and inspire those in a position to make a difference– Mike Schmoker

</div>

5.1 INTRODUCTION

The preceding chapter deliberated and discussed the method of research methodology that was implemented in this study. The method of research included research design, questionnaire development, conducting of the empirical survey and the statistical techniques that were employed in the analysis of empirical data. The principal aim of this chapter, therefore, is to provide a comprehensive account of how methodological issues outlined in the method of research were implemented in this study to yield empirical findings and realise the study's objectives.

The chapter also clarifies the findings that were acquired from statistical analysis of data. The clarification is deliberated in four major sections. The first section of this chapter discusses the descriptive results of the demand survey. Descriptive results for demand are presented through frequency tables and mean scores. The aspects of descriptive analysis that are presented in this chapter of demand focused on demographic profile aspects such as gender, age, country of residence, education, income and marital status. The second segment of the chapter focused on exploratory analyses. The relationships between demand factors and variables are discussed in the third segment of this chapter. It was achieved by means of correlations, independent *t*-tests, and One-Way Analysis of Variances. The last segment discusses the results of regression analysis and the models that were developed from the results. Figure 5.1 below shows the schematic outline of Chapter 5 and its components.
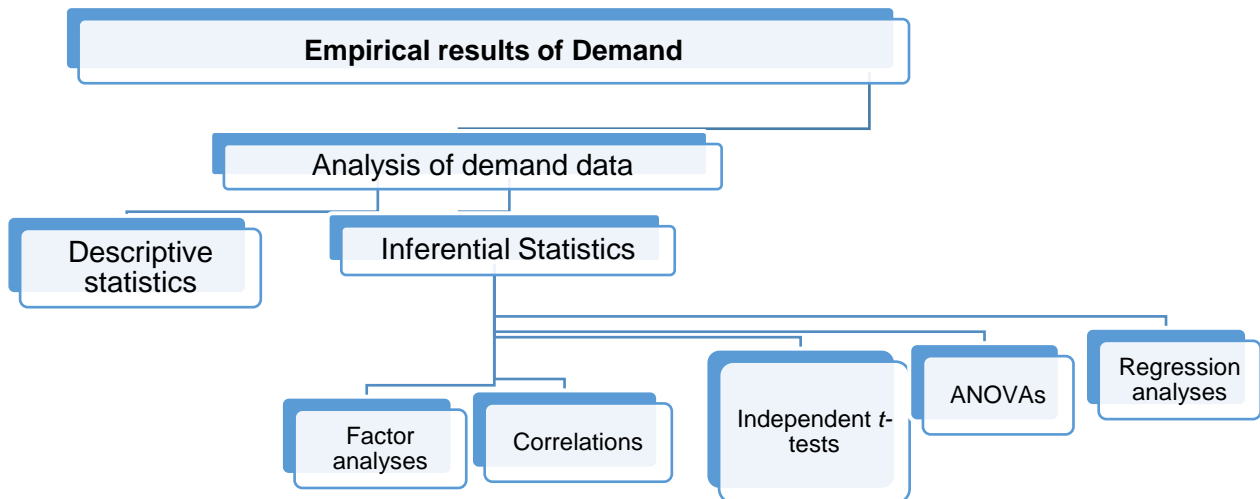
Figure 5.1: Schematic outline of the chapter
Source: Developed by author

5.2. DESCRIPTIVE STATISTICS OF DEMAND

Descriptive statistics is generally used to describe the basic features of data in a research study (Babbie, 2013:460; Cooper & Schindler, 2006:656). Therefore, it is important to note that descriptive statistics provide simple analysis of the sample and the measures that were employed in the study. Thus, coupled with graphic analysis, descriptive analysis forms the basis of quantitative data analysis. The purpose of this section is to present the results pertaining to the demographic profile, travel behaviour and travel motivations of tourists who visited Zimbabwe between 21 November 2016 and 17 January 2017.

5.2.1 Demographic profile of respondents

Table 5.1 below presents the socio-demographic summary of respondents. The respondents who partook in this survey were categorised according to gender, age, continent of residence, level of education, net income after tax, and marital status. Jonsson and Devonish (2008:403) argue that age had a significant influence on travel motivations, while Khan (2011:109) also notes that certain socio-demographic variables, such as age, gender, education and economic position affect travel decisions. Patterson (2007:118) states that certain demographic variables can be linked to destination loyalty. The understanding of Zimbabwe's tourist demographic

profile is crucial for tourism organisations and the destination marketing organisation because it assists them in understanding the tourism market better.

Table 5.1: Demographic profile of respondents

Variable	Category	Frequency	Valid Percent
Gender	Female	252	56%
	Male	198	44%
Age	17 -25 years	36	8%
	26 -35 years	100	22.2%
	36 - 55 years	147	32.7%
	56 - 79 years	157	34.9%
	80 years and above	10	2.2%
Continent of residence	Asia	61	13.6%
	Africa	148	32.9%
	North America	81	18%
	South America	14	3.1%
	Europe	134	29.8%
	Australia/Oceania	12	2.7%
Level of education	No school	9	2%
	Non- degree	30	6.7%
	Diploma/degree	230	51.1%
	Post-graduate	181	40.2%
Marital status	Divorced	30	6.7%
	Married	277	61.6%
	Separated	7	1.6%
	Single	101	22.4%
	Widow	35	7.8%
Average income after tax (USD$)	< $500	8	1.8%
	$501 - $1 000	36	8%
	$1 001 – $3 000	229	50.9%
	$3 001 – $5 000	128	28.4%
	$5 001 – $7 000	37	8.2%
	$7 001 – $9 000	9	2%
	$9 001 – $10 000	2	0.4%
	>$10 000	1	0.2%

The majority of the respondents for the demand survey were female (56%), thus, slightly more females participated in this survey. This might also imply that women travellers are an important market segment for Zimbabwean tourism. The majority of travellers to Zimbabwe are aged between 36 and 55 years (32.7%). This group of travellers forms the economically active group that is able to fund their vacation trips. The study also notes Zimbabwe receives a significant number of older travellers between the age of 56 and 79 years (34.9%), mainly because they constitute those who are already into retirement hence there is more time for vacation trips. The average age of respondents was 40 years.

Most of the respondents (61.6%) were married, followed by those who were single (22.4%). Table 5.1 also indicates the income of the respondents after tax. The majority of the respondents (50.9%) indicated that their monthly income ranges between USD$1001 and USD$3 000. 28.4% indicated that their monthly income after tax is within the bracket of $3 001 to $5 000. Those who earn between $501 - $1 000 and those who indicated that their income ranges between $5 000 - $7 000 were 8% of the respondents respectively. High-income earners who responded in this study were less than 1% (c.f. Table 5.1). This finding implies the need for Zimbabwe to be competitively priced as compared to competitors. The tourists that visit Zimbabwe are not high-income earners.

The majority of the respondents (32%) indicated that their continent of residence was Africa, followed by 29.8% residing in European countries. Those who indicated that they were from North American countries were 18% of the sample, while those from Asia were 13.6%. There were 3.1% from South America and a mere 2.7% were from Australia (c.f. Table 5.1). A total of 91.3% of the respondents were educated (with 51.1% indicating that they were holders of either a degree or a diploma qualification while 40.2% had postgraduate qualifications) (refer to Table 5.1). Non-degree holders made up 6.7% of the respondents while those with schooling were 2% of the sample. Therefore, it is important for Zimbabwean tourism to come up with proper market segmentation strategies that cater for each segment. Additionally, marketing segmentation is crucial for Zimbabwe as it helps the destination managers to develop better understanding of the destination's specific segments (Chi, 2012:3). This will also

entail that Zimbabwe must come up with different destination marketing and branding strategies for each segment given their distinct needs and wants.

In summary, the study noted that the majority of respondents were female, on average 40 years of age and with an average income of US$1500 per month after tax. Tourists from the African continent are the largest market segment for Zimbabwean tourism and this finding could be attributed to proximity as compared to other tourist markets such as Europe for example.

5.2.2 Travel behaviour

Van Vuuren and Slabbert (2011:295) note that, "travel behaviour refers to the way in which tourists behave according to their attitudes, before, during and after travelling". Therefore, the travel behaviour aspects were categorised as the frequency of visits to Zimbabwe, the average travel group size, average length of stay, as well as the average spending by tourists. The empirical findings in this regard are crucial in assisting Zimbabwe Tourism Authority and other tourism players in marketing, product planning, and development, which all have the potential to increase visitors to tourism products (Van Vuuren & Slabbert, 2011:295). Descriptive analysis of the respondents' travel behaviour is discussed in detail under this section.

Table 5.2: Travel behaviour variables

Variable	Category	Frequency	Valid %
Average frequency of visits to Zimbabwe	1st time	328	72.9%
	2 - 3 times	98	21.8%
	4 - 5 times	12	2.7%
	More than 5 times	12	2.7%
Average group size	Travelling alone	28	6.2%
	2 people	231	51.3%
	3 - 5 people	85	18.9%
	6 -10 people	36	8%
	11 - 15 people	32	7.1%
	16 -20 people	26	5.8%
	above 20 people	12	2.7%

Length of stay	Day trip	8	1.8%
	1 night	25	5.6%
	2 nights	328	72.9%
	3 nights	46	10.2%
	4 nights	27	6%
	5 nights	5	1.1%
	6 nights	7	1.6%
	7 nights	3	0.7%
	10 nights	1	0.2%

Most of the respondents to the demand survey (72.9%) indicated that they were visiting Zimbabwe for the first time. The relatively high number of first-time visitors implies that Zimbabwe is attractive and competitive as it is associated with market growth. This finding is consistent with the findings of Petrick (2004). However, this result also implies that Zimbabwe will incur higher marketing costs since the development of new markets always requires the substantive deployment of resources (Kruger, Saayman & Hermann, 2014:1).

Repeat visitation for brand Zimbabwe is as low as 2.7% and this reduces Zimbabwe's competitiveness from a cost advantage perspective. Higher marketing costs are involved in attracting new tourists as shown above. Additionally, the low repeat visitor percentage also implies that the tourists do not want the tourism products Zimbabwe is marketing. Therefore, it can be argued that low visitation implies a weakness in the marketing efforts of Zimbabwe in that it fails to offer enough opportunities for why tourists should consider repeat visitation. This could also be explained by the fact that tourists are only comfortable in visiting big attractions where their safety is guaranteed.

Literature notes that repeat visitors are a sign of service quality or service satisfaction (McCain, Jang & Hu 2005:472) and loyalty (Chi, 2012:3). Consequently, the low number of repeat visitors could be attributable to poor service, particularly on roads that are "infested" with roadblocks where the police are always demanding a bribe. More importantly, the low number of repeat visitors means that the brand loyalty for Zimbabwe is relatively weak. Additionally, there is need for Zimbabwe as a tourism

destination to create an environment that promotes repeat behaviour. Destination managers in Zimbabwe should, therefore, strive to achieve a balance between first-time and repeat visitors. This is crucial for Zimbabwe, especially in terms of consequent benefits of attracting and retaining visitors. The results of repeat visitation can also be used by Zimbabwe in the formulation of segmentation strategies.

The empirical results showed that the average travel group size was relatively small (2 people in a group; 53.1%). The average length of stay was found to be two nights (72.9%) indicating that tourists do not stay for longer periods of time in Zimbabwe. This, therefore, means that brand Zimbabwe, as a tourism destination, is not attractive enough to ensure that tourists stay longer. The implication of a shorter length of stay is that the tourism income will go down and this will eventually affect the competitiveness of Zimbabwe as a tourism destination as tourists opt to stay longer in other destinations. Length of stay is a basic characteristic of a holiday, and shorter length of stay as found in this study implies that brand Zimbabwe will be affected in terms of hotel occupancies and tourism industry's revenues. One of the attributes that contribute to a shorter length of stay in Zimbabwe, as found in this study, is the issue of being an expensive destination (c.f. Table 5.3).

5.2.2.1 Average spending of respondents

Table 5.3 below shows the average spending per person with regard to tourists visiting Zimbabwe. The average cost of organised tour packages per person is $4570.42 excluding spending on food and drinks as well as retail shoping. The average spending is US$1792 per person when one makes their own travel arrangements, while the average cost of flying to Zimbabwe is estimated at $1143.00. In addition to this, it is important to note that the average cost of accommodation in the destination per visit is $263.00 per room. The empirical results also show that the average cost of activities and access to attractions in Zimbabwe is estimated at $29.00 per person. The average cost of transport for tourists without tour packages is US$60 per person.

Table 5.3: Average spending in Zimbabwe

Item	Cost in USD$
Average cost of tour packages	4570.42
Average cost of flight	1143
Average spending on accommodation per visit	263
Average spending on activities per visit	106
Average spending on souvenirs per visit	29
Other transport and travel costs	60
Average retail shopping per visit	74
Average spending on food and drink per visit	117

It is clear from the findings that brand Zimbabwe is an expensive destination brand and this affects its attractiveness and competitiveness negatively. Pricing and cost of travelling has been found in other research studies as a key element of destination attractiveness (see Cracolici & Nijkamp, 2008; Kim, 1998; Hu & Ritchie, 1993). It is also important to note that pricing could be one of the reasons that make the length of stay shorter, as discussed earlier.

5.2.2.2 Alternative tourist destinations of choice

Figure 5.2 below indicates the first preference that respondents to this survey would have chosen if they have not visited Zimbabwe. The majority of respondents from countries such as Canada, Australia, United Kingdom, United States, Italy, Belgium, etc. (63.3%) indicated that they would have visited a Southern African country if they did not travel to Zimbabwe and key among the Southern African choices were South Africa and Namibia. This was followed by a choice of countries that fall within the Asian block (7.3%). West Africa was found to be the least favourable alternative destination of choice as only 1.3% indicated it as an alternative.
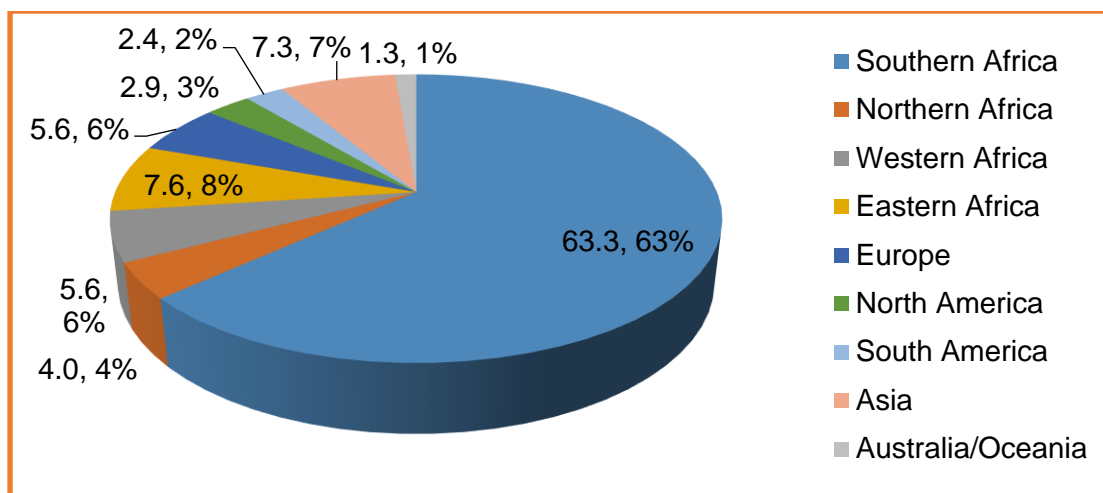
Figure 5.2: Alternative tourist destination regions

Findings presented in Table 5.4 below indicate the respondents' second alternative destination had they not visited Zimbabwe. Just like in Figure 5.2 above, Southern African countries were listed as the next best alternative tourism destination options (59.3%) with South Africa, Namibia, and Botswana dominating the list. This implies that competition for tourism products is growing in Southern Africa, and Zimbabwe must up its game in an attempt to remain competitive. The Asian countries were listed as the second next best alternative tourism destinations the respondents would have visited instead of Zimbabwe (7.8%). The respondents who indicated that they would have visited East African countries had they not visited Zimbabwe were 7.1% of the sample, and among the list of countries that were mentioned, Rwanda and Kenya dominated the list. North American countries, European countries and West African countries had respondents that were just above 5% (c.f. Table 5.4).

Table 5.4: Second alternative tourism destination region

Alternative destination region	Frequency	Valid Percent
Southern Africa	267	59.3%
Northern Africa	21	4.7%
Western Africa	24	5.3%
Eastern Africa	32	7.1%
Europe	24	5.3%
North America	25	5.6%
South America	15	3.3%
Asia	35	7.8%
Australia/Oceania	7	1.6%

Therefore, it is clear that if Zimbabwe is to remain attractive for its target market, it needs to address issues of pricing and the heavy police presence on the roads that negatively affects the length of stay. Failure to deal with these demand issue constraints will see brand Zimbabwe losing its market share to competitors in the region, like South Africa, Namibia, and Botswana.

5.2.2.3 Heard about Zimbabwe as a destination

Table 5.5 shows the distribution of how the respondents heard about Zimbabwe as a tourism destination. The majority of the respondents heard about the destination through word-of-mouth messages (WOMs), indicating that WOMs is one of the communication platforms that Zimbabwe as a tourism destination needs to embrace and utilise. This can start if current tourists have positive tourist experiences.

Table 5.5: The media channels related to Zimbabwe

Media channel	Number of respondents
Traditional media	*127 respondents*
Word of mouth (WOM)	*273 respondents*
Online media	*187 respondents*
Brochures	*88 respondents*
Tradeshows	*27 respondents*

Literature shows that free advertising of a tourism destination in the form of positive WOM messages is most likely among repeat visitors (Chi, 2012; Oppermann, 2000; Petrick & Sirakaya, 2004). There is, however, a contradiction between what was found in this study and what literature has found with regard to repeat visitation and positive word of mouth. Zimbabwe enjoys high positive word of mouth marketing advantages but suffers from low repeat visitors and shorter length of stay. These findings can also be used by Zimbabwe as its basis for segmentation, destination marketing and promotion messages. The findings show that destination marketing and branding in Zimbabwe is not necessarily effective in reaching the targeted tourists and this implies that the investment that was put into branding and other destination marketing strategies are not bringing forth positive results. It is crucial for Zimbabwe to sell the destination using a mixture of the channels.

5.2.3 Travel motivations to destination

Van Vuuren and Slabbert (2012:296) note that travel motivations are the most significant psychological stimulus to tourist behaviour in terms of destination choice. Travel motivation is, therefore, a major determinant for the traveller's behaviour (Wong, Musa & Taha, 2017:396). The principal element of a tourism system is the destination with its features and resources (Jonsson & Devonish, 2008:399); thus, in trying to meet the study's objectives, it was imperative for this study to empirically examine Zimbabwe's destination attractiveness by means of examining tourist motivation. This section, with the aid of Table 5.6 below, explains the reasons why tourists visit Zimbabwe as a tourism destination. The majority of the respondents agreed and strongly agreed that they visit Zimbabwe for:

- Enjoying beautiful scenery (96.5%; $\bar{x}$ = 4.18; SD = ± 0.64)
- Sightseeing tourism attractions (95%; $\bar{x}$ = 4.24; SD = ± 0.58)
- Visiting a place they have never visited before (93.5%; $\bar{x}$ = 4.19; SD = ± 0.63)
- Appreciating natural resources (91.8%; $\bar{x}$ = 4.14; SD = ±0.67)
- Participating in new things (90.4%; $\bar{x}$ = 4.05; SD = ±0.78)
- Learning new things (89.6%; $\bar{x}$ = 4.05; SD = ±0.78)
- Having enjoyable time with travel companions (86.4%; $\bar{x}$ = 4.01; SD = ± 0.67)
- Finding thrills and excitement (85.1%; = $\bar{x}$ = 3.95; SD = ±0.88)
- Enjoying local cuisine (85.1%; $\bar{x}$ = 3.96; SD = ± 0.81)
- African experience (82.5%; $\bar{x}$ = 3.74; SD = ±0.59)
- Spiritual relaxation (82.2%; $\bar{x}$ = 3.83; SD = ±0.85)
- Physical relaxation (82%; $\bar{x}$ = 3.74; SD = ±0.83)
- Being away from home (80%; $\bar{x}$ = 3.85; SD = ±0.88)
- It is part of the tourists' lifestyle (70.2%; SD = ±0.82)

Visiting friends and relatives was not the primary motivation (48.2% totally disagree). In addition to this, 53.3% also totally disagree with the idea that they were visiting destination Zimbabwe for the purposes of living/staying temporarily with the local communities (c.f. Table 5.6). It is clear from Table 5.6 that nature-based tourism attractions of Zimbabwe are important to the respondents and Zimbabwe must sell itself as a brand based on its natural attractions as it gives the country unique selling points (see Chapter, 6).

Table 5.6: Travel motivations

Reasons for visiting Zimbabwe	Totally Disagree Valid %	Disagree Valid %	Not sure Valid %	Agree Valid %	Totally Agree Valid %	Mean	Std Dev.
to relax physically	2.7%	9.8%	5.6%	74.9%	7.1%	3.74	±0.83
to relax spiritually	2.4%	8.%	7.1%	69.1%	13.3%	3.83	±0.85
to participate in new activities	2.9%	2.%	4.7%	68.4%	22%	**4.05**	±0.78
to find thrills and excitement	4.4%	2.2%	8.2%	64.2%	20.9%	3.95	±0.88
to sightsee tourism attractions	0%	1.3%	3.6%	**65.1%**	**30%**	**4.24**	**±0.58**
to appreciate natural resources	0.7%	2.2%	5.3%	65.8%	26%	4.14	±0.67
to meet new people	4.7%	7.1%	14.2%	58.9%	15.1%	3.73	±0.96
to interact with unknown local residents	20.9%	19.3%	17.3%	27.3%	15.1%	2.96	±1.38
to visit friends and relatives	48.2%	21.6%	10%	15.6%	4.7%	2.07	±1.27
to live/stay temporarily with local communities	53.3%	23.8%	2.7%	16.9%	3.3%	1.93	±1.24
to increase my social status	27.3%	16.4%	19.1%	31.6%	5.6%	2.72	±1.311
to visit a destination that impresses friends and family	16.2%	8.7%	18%	54%	3.1%	3.19	±1.17
to satisfy the desire to be somewhere else	7.8%	4.2%	9.6%	60.9%	17.6%	3.76	±1.04
to fulfils the dream of visiting a foreign country	6.2%	7.3%	8.4%	62.7%	15.3%	3.74	±1.01
to have an enjoyable time with travel companion(s)	0.7%	2.7%	10.2%	68.2%	18.2%	4.01	±0.67
to be away from home	3.3%	5.3%	11.3%	63.3%	16.7%	3.85	±0.88
to seek solitude in a foreign country	3.6%	7.3%	14.2%	59.1%	15.8%	3.76	±0.93
to learn something new and interesting	2.9%	1.3%	6.2%	66.9%	22.7%	4.05	±0.78
to visit a place, I have not visited before	0%	2.7%	3.8%	65.1%	28.4%	4.19	±0.63
to enjoy good physical amenities	0.7%	6.2%	14.2%	69.1%	9.8%	3.81	±0.72

to visit historical and cultural attractions	0%	4.9%	14.2%	67.1%	13.8%	3.9	±0.68
to enjoy local cuisine	1.6%	6%	7.3%	64.9%	20.2%	3.96	±0.81
to enjoy beautiful scenery	1.6%	0.7%	1.3%	70.9%	25.6%	4.18	±0.64
because it is a safe destination	0.7%	4.4%	16.9%	69.8%	8.2%	3.8	±0.67
because it is easy to access	2%	4.7%	15.6%	71.1%	6.7%	3.76	0.73
it is party of my lifestyle	3.3%	6.4%	12.7%	70.2%	7.3%	3.72	0.82
the country represents a genuine African experience	0%	0.7%	16.9%	67.8%	14.7%	3.96	0.59

It was found that the majority were motivated to visit Zimbabwe for the purposes of enjoying the country's beautiful scenery (96.5% both agree and strongly agreed) as well as sightseeing (with 95.1% both agree and strongly agreed). This finding is consistent with literature in terms of the dimensions of destination attractiveness that are significant (see Reitsamer *et al.,* 2016; Reitsamer & Brunner-Sperdin, 2017). Other critical tourist motivations noted in this survey was the need to visit a place that was "never" visited before, as well as participating in and learning new things. This correlates with the number of tourists recorded as first time visitors to Zimbabwe. This study argues that, in dealing with this, Zimbabwe must direct its marketing efforts towards building a bucket list tour package for Zimbabwe. This approach will help Zimbabwe deal with the problem of length of stay and encourage visitation to less popular tourist attractions.

The prediction of travel behaviour based on these travel motivations will also play a strategic role in tourism marketing and creating demand for Zimbabwe as a tourism destination (March & Woodside, 2005; Van Vuuren & Slabbert, 2012; Wong *et al.,* 2017). Understanding tourist motivations also helps Zimbabwe in identifying target markets in which their tourist motivations match the destination's attributes (Kozak, 2002). Grounded on this analysis of the travel motivations, Zimbabwe can actually increase repeat visitors if it focuses on the motivations that tourists seek when visiting the destination in its marketing and branding messages. Destination marketing and branding for Zimbabwe must be purely informed with the motivations for demand of the destination.

5.3 OVERVIEW OF DESTINATION ATTRACTIVENESS DESCRIPTORS

This section of the chapter presents and discusses the overview of destination attractiveness descriptors. The destination attractiveness descriptors of Zimbabwe are based on frequencies, means and standard deviations.

Based on the results presented in Table 5.7 below, respondents consider Zimbabwe to be an attractive destination for tourism. Based on the frequencies presented in Table 5.7 below, respondents agree to strongly agree that Zimbabwe is attractive because of:

- Unique tourist attractions (97%);
- Safety of tourists (91.1%);
- Destination's vibrancy (90.2%)
- Destination's brand positioning (85.8%)
- Destination has unique facilities (76.3%);
- Accommodation at destination is excellent (80.4%);
- Tourism friendly image (79.4%);
- Communication at destination (74.2%);

The mean values that are also presented in Table 5.7 indicate that the attractiveness descriptors for destination Zimbabwe are:

- Unique attractions ($\bar{x} = 4.21$; *SD* $= \pm 0.456$);
- Hospitality and friendliness of local people ($\bar{x} = 4.21$; *SD* $= \pm 0.680$);
- Way of life for local people ($\bar{x} = 4.12 =$; *SD* $= \pm 0.678$);
- Unique handicrafts and souvenirs ($\bar{x} = 4.05$; *SD* $= \pm 0.715$);
- History and folklore ($\bar{x} = 4.00$; *SD* $= \pm 0.481$);
- Destination safety and security ($\bar{x} = 3.99$; *SD* $= \pm 0.460$);
- Destination's commitment in ensuring a safe destination environment ($\bar{x} = 3.97$; *SD* $= \pm 0.512$).

Table 5.7: Overview of destination attractiveness descriptors

Zimbabwe is attractive because:	Strong Disagree	Disagree	Not Sure	Agree	Strongly agree	Mean	St. Dev.
the destination has unique natural attractions	0%	0%	2%	74.7%	23.3%	4.21	±.456
the destination has unique built attractions	2.9%	0%	33.1%	48.4%	15.6%	3.74	±.824
the archaeological cultural attractions are excellent	0%	1.8%	52.%	35.8%	10.4%	3.55	±.702
the historical cultural attractions are excellent	0%	2.4%	56.%	30.4%	11.1%	3.50	±.723
the cultural festivals are unique	1.1%	2.0%	62.2%	26.7%	8%	3.38	±.710
the destination has unique handicrafts/souvenirs	0.7%	1.1%	15.8%	57.3%	25.1%	4.05	±.715
the way of life of local people is unique	0.7%	0%	13.6%	58.0%	27.8%	4.12	±.678
the level of hospitality and friendliness of the local people is excellent	0.7%	0%	10.7%	54.7%	34%	4.21	±.680
the language of the local people is unique	1.8%	0.7%	22.0%	54.0%	21.6%	3.93	±.786
the destination has unique icons	0.7%	10.7%	49.3%	36.2%	3.1%	3.30	±.727
the destination has many opportunities for social interactions with others	2.9%	3.8%	31.8%	54.7%	6.9%	3.59	±.794
the destination has quality facilities	0%	4.%	19.8%	70.7%	5.6%	3.78	±.604
the destination's tourism infrastructure is excellent	4.0%	20.4%	20.9%	54.%	0.7%	3.27	±.928
tourism support services for example foreign language interpretation, laundrettes, postal and banking are excellent	0.1%	8.4%	40.4%	44.9%	6.2%	3.81	±.592
the general services levels are excellent	0.4%	0.7%	26.2%	66.9%	5.8%	3.77	±.580
accommodation at the destination is excellent	0%	4.7%	14.9%	75.3%	5.1%	3.81	±.592
the cuisine of Zimbabwe is excellent	0%	1.3%	22.4%	53.8%	22.4%	3.97	±.709

the entertainment - night clubs, jazz and music performances are excellent	0.7%	1.8%	42.0%	47.3%	8.2%	3.61	±.693
the retail outlets - shopping malls and centres, travel agents, etc. are excellent	0.7%	1.8%	53.8%	38%	5.8%	3.46	±.664
sports and activities offered are excellent	0%	0%	50.7%	42%	7.3%	3.57	±.627
the image of Zimbabwe is tourism friendly	0%	4.4%	16.2%	71.6%	7.8%	3.83	±.623
the marketing of the destination is excellent	2.0%	7.6%	37.1%	49.1%	4.2%	3.46	±.778
the exchange rate is favourable	4.4%	14.2%	24.2%	54.4%	2.7%	3.37	±.916
the transport at the destination is excellent	0.7%	5.3%	22.9%	69.8%	1.3%	3.66	±.632
the communication at the destination is excellent	0.7%	5.3%	19.8%	70%	4.2%	3.72	±.659
the destination has good infrastructure in terms of airports, roads, railways and ports	4.7%	16%	32.0%	46.7%	0.7%	3.23	±.889
it is easy to access the destination from my country of origin	4.2%	42.7%	14.0%	28.4%	10.7%	2.99	±1.144
the destination's airport route is available from my home country	6.2%	52%	13.8%	14.9%	13.1%	2.77	±1.179
the frequency of transportation (both air and road) to Zimbabwe makes it very accessible	5.8%	43.1%	20.2%	18%	12.9%	2.89	±1.161
the prices charged for transport and tourism services are reasonable	16.2%	26.2%	32.4%	22.4%	2.7%	2.69	±1.072
Zimbabwe is an innovative tourist destination	0.7%	12.7%	35.1%	48.2%	3.3%	3.59	±.720
Zimbabwe has state of the art technology	10.4%	21.6%	27.8%	40.2%	0%	3.41	±.777
the destination has visa policies that are tourism friendly	7.8%	10.7%	17.1%	63.8%	0.7%	2.98	±1.019
making reservations is easy	2.2%	3.8%	25.6%	66.4%	2%	3.39	±.966
there is a wide access to tourist information	2%	3.6%	26.4%	66%	2%	3.62	±.696
the drive time to Zimbabwe from my home country is short	45.1%	27.3%	3.1%	18%	6.4%	3.62	±.683

there is easy access to Wi-Fi/internet	35.1%	30.9%	18.2%	13.1%	2.7%	2.13	±1.330
the drive time between attractions is short	21.6%	32.2%	20.4%	20%	5.8%	2.17	±1.127
the destination is vibrant	0%	1.8%	8.0%	85.1%	5.1%	3.94	±.446
the history and folklore of the destination is interesting	0%	0%	26%	55.8%	18.2%	4.00	±.481
tourist services and amenities are delivered with courtesy	0%	0%	17.6%	72.4%	10%	3.92	±.661
Zimbabwe offers a true African experience	0%	0.7%	20.2%	67.8%	11.3%	3.92	±.520
the destination offers high levels of service delivery	0%	0.7%	17.3%	73.1%	8.9%	3.90	±.577
the destination is safe and secure for tourists	0%	1.1%	7.8%	82.2%	8.9%	3.99	±.460
the destination is committed to ensure safety of tourists	0%	0%	14.4%	73.8%	11.8%	3.97	±.512
the destination has the ability to respond to the changing needs of the visitors	0%	6.7%	34.9%	53.3%	5.1%	3.57	±.694
tourists have easy access to Wi-Fi and Internet services	28.4%	25.8%	27.8%	14.9%	3.1%	2.38	±1.137
tourism providers in Zimbabwe work together to offer improved products to tourists	1.1%	7.1%	43.3%	39.6%	8.9%	3.48	±.799
Zimbabwe looks after its environment	1.8%	9.6%	20.2%	61.8%	6.7%	3.62	±.817
the level of sanitation and hygiene at the destination is very high	2.0%	5.8%	13.3%	74.7%	4.2%	3.73	±.719
the prices of tourism services in Zimbabwe are competitive	31.6%	40%	12.4%	15.1%	0.9%	2.14	±1.053
the price of airport amenities (for instance parking fees and restaurants) are competitive	17.3%	29.6%	47.1%	5.1%	0.9%	2.43	±.865
the tax policies on tourist services (including Value Added Tax) are tourist friendly	12.4%	23.8%	56.2%	6.9%	0.7%	2.60	±.818
the use of multi-currency in Zimbabwe reduces travel vacation costs	5.8%	12.7%	52.9%	24.9%	3.8%	3.08	±.868
the destination offers value for money	0.9%	9.3%	25.3%	63.1%	1.3%	3.55	±.718

Statement						Mean	Std. Dev.
Zimbabwe has a price advantage when compared to other destinations I have visited	37.8%	36.9%	12.7%	12.0%	0.7%	2.01	±1.023
the destination's brand name (*Zimbabwe: A World of Wonders)* is attractive	0.9%	1.1%	16.7%	75.1%	6.2%	3.85	±.575
the destination's logo is attractive and enticing	0.9%	2.7%	23.8%	68.7%	4.0%	3.72	±.623
the brand is associated with quality and good experience	0.9%	2.2%	44.7%	50.2%	2.0%	3.50	±.623
Zimbabwe's value proposition captures my interest, hence the visit to the destination	0.9%	6.7%	46.0%	40.2%	6.2%	3.44	±.748
the destination serves the needs of the visitors	0%	2.7%	41.8%	52.9%	2.7%	3.56	±.595
the destination's brand positioning, *A world of Wonders,* is attractive and appealing	0%	0.9%	13.3%	80.2%	5.6%	3.90	±.465
I perceive Zimbabwe as an attractive destination brand	0%	0.9%	29.8%	44.4%	24.9%	3.93	±.761
the destination's positioning statement (*A World of Wonders)* matches what I have experienced as a tourist	0%	7.1%	42.0%	46.7%	4.2%	3.48	±.691
I have visited the destination because of its brand awareness programmes	1.6%	31.1%	42.7%	24.0%	0.7%	2.91	±.796
the destination's brand identity is suitable for its target audiences	0%	1.6%	50.9%	43.6%	4.0%	3.50	±.602
my visit to Zimbabwe was influenced by the image of the destination	2.4%	24.2%	29.8%	36.4%	7.1%	3.22	±.972
my post-visit behaviour is likely to be influenced by the destination's brand image	2.4%	12.2%	10.7%	38%	36.7%	3.94	±1.087
the destination's brand image influenced my choice of visiting Zimbabwe	1.6%	24.4%	33.1%	33.1%	7.8%	3.21	±.952
I will recommend my friends to visit Zimbabwe	0%	0%	9.3%	45.1%	45.6%	4.36	±.647
I intend to revisit Zimbabwe in the near future	2.0%	5.3%	14.4%	31.1%	47.1%	4.16	±.993
I will speak well of Zimbabwe to my friends and family	0%	0%	3.8%	27.3%	68.9%	4.65	±.551

In summary, the study found that brand Zimbabwe as a tourism destination is attractive to tourists mainly because of its unique tourist attractions such as the Victoria Falls, Great Zimbabwe, Mana Pools, and Matopos National Park. Additionally, it was also found that brand Zimbabwe is an attractive destination that promotes safety of tourists, which is contrary to the perceptions that Zimbabwe's source markets have. More efforts are required, therefore, in promoting Zimbabwe as a safe destination, particularly using WOM. The safety finding was found to be consistent with the views of Vengesayi (2003:643). The destination is also attractive because of the hospitality and friendliness of its residents. These insights from the descriptive empirical results about destination attractiveness indicators are crucial to destination marketers and tourism suppliers. The knowledge of destination attractiveness has a bearing on the formulation of brand communication messages and tourism policy.

5.4 INFERENTIAL STATISTICS OF DEMAND

Inferential statistics is a branch of statistics that is generally concerned with making inferences (decisions, estimates, predictions or generalisations) about a population of measurement based on information contained in a sample of data taken from the population in question (Scott, 2009:429). Therefore, inferential statistics was used in the demand empirical analysis to measure significance (Marshall & Jonker, 2011:17). This was done to measure if the difference between destination attractiveness factors and other variables were as a result of chance or the real effect of a test (Marshall & Jonker, 2011:17). The p-values and effect sizes were employed in this study. The purpose of this section is to present the results pertaining to the inferences that the researcher made using demand data that was gathered from tourists who visited Zimbabwe between 21 November 2016 and 17 January, 2017.

The next section presents and discusses the results of the exploratory analyses of destination attractiveness factors.

5.4.1 Exploratory analyses of destination attractiveness descriptors

Factor analyses were done to determine the critical factors that influence destination attractiveness of Zimbabwe as a tourism destination. Factor analyses were conducted for the purposes of data reduction and summarisation (Malhotra *et al.* 2013:262).

Thus, in this survey, the researcher used a number of variables divided into eleven groups, which required reduction to a manageable level. Therefore, during factor analysis of demand, the researcher examined interrelated variables and represented them in fewer underlying factors. Factor analyses of demand were conducted by using the principal component analysis with oblique rotation, which is a measure of construct validity.

The purpose of conducting factor analyses was to determine whether underlying factors might be present in the demand data before implementing further analysis and modelling. To ensure that a better attractiveness position is achieved, it is important for Zimbabwe as a destination to have a clear understanding of the factors that are important. The groupings that were used in the factor analyses process to measure destination attractiveness were attractions/attributes (Group 1*, with 11 elements*), amenities (Group 2*, with 14 elements*), accessibility (Group 3*, with 14 elements*), ambiance (Group 4*, with six elements*), destination environment (Group 5*, with 7 elements*), price (Group 6*, with 6 elements*), destination brand positioning (Group 7*, with 5 elements*), destination brand identity (Group 8*, with 5 elements*), destination brand image (Group 8, *with 3 elements*), destination brand loyalty (Group 9*, with 2 elements*) and destination brand loyalty (Group 10, *with 3 elements*). These groupings were determined by means of the literature review and found to be statistically reliable and valid.

In all cases, Oblimin oblique rotation was conducted on the principal component of the groupings. The Bartlett's test of sphericity was smaller than 0.001 ($p < 0.000$), which indicated statistical significance (Malhotra *et al.,* 2013:624) and supported destination attractiveness factor analyses. The majority of the elements loaded higher than 0.3. The factors that were retained had an eigenvalue greater than 1 (Zikmund *et al.,* 2010:594). The Kaiser-Meyer Olkin measure of sampling adequacy is defined as an index of appropriateness of the factor analyses and high values are considered between 0.50 and 1.0 (Malhotra *et al.,* 2013:624; Field, 2000). KMO values that are below 0.5 indicate that factor analyses will not be appropriate. The grouping of factors showed a high sampling adequacy above 0.50 for all factor analyses. The Cronbach's coefficient was used to assess the internal consistency among the elements that were observed during factor analyses. The purpose of generating the Cronbach's Alpha

coefficients was to confirm if the data that was collected in the demand survey was reliable. The reliability coefficients ranged from 0.61 to 0.89, all exceeding what Malhotra (2010) defined as an acceptable cut off coefficient. Elements that cross-loaded in either factor one or factor two, having a loading of more than 0.3, were classified in the factor which the researcher felt was most appropriate.

Group 1: Destination attractions elements

The destination attractions factor revealed a mean score of 3.74, a reliability coefficient of 0.83, showing internal consistency for this group. 0.32 indicated the average inter-item correlation of this grouping and thus these aspects fit together. This factor referred to the extent to which Zimbabwe is attractive as a tourism destination in terms of what it offers. 11 elements were loaded for factor analyses and ten were retained. "The destination has unique natural attractions" factor item was dropped after failing to load above 0.3. Table 5.8 shows the results of factors analysis in relation to destination attraction aspects.

Table 5.8: Factor analyses for destination attractions elements

Destination attractions elements	Factor loading	Cronbach Alpha	Mean	Inter item correlation	Cumulative variance %
Factor 1: Destination attractions		**0.83**	**3.74**	**0.32**	**61.6%**
Unique built attractions	0.803				
Language of local people	0.715				
Excellent archaeological cultural attractions	0.709				
Excellent historical cultural attractions	0.701				
Unique handicrafts/souvenirs	0.631				
Unique cultural festivals	0.620				
Unique way of life of local people	0.588				
Hospitality/friendliness of local people	0.582				
Social interactions opportunities	0.486				
Unique destination icons	0.368				
Note: KMO (Kaiser-Meyer-Olkin measure of sampling adequacy) = 0.79, Bartlett's test of sphericity: p<0.001. Extraction method: Principal component analysis. Rotation method: Oblimin with Kaiser normalization; analysis N = 450. Mean calculated from a minimum of 1 and a maximum of 5.					

All the items that were loaded into this group for factor analyses signified the perceptions of tourists in relation to the attractiveness of brand Zimbabwe as a tourism destination. Empirical results from the factor analyses shows that unique built attractions are the item with the strongest association to the underlying latent variable, with a factor loading of 0.803. Unique destination icons are one of the items of the factor that is also marginally important in destination attractions factor (loading 0.368). However, one item was eliminated because it failed to reach the minimum requirement of factor loading, as there was not much variance in the responses made by tourists with regard to the element "the destination has unique natural attractions". As indicated by the descriptive results, respondents all agree that Zimbabwe has unique tourism attractions and it was identified as one of the key primary pull factors for visitation.

Attractions constitute the primary reason for tourist visitation in any destination (Reitsamer, Brunner-Sperdin & Stokburger-Sauer, 2016:93). As a result, they are a crucial dimension, particularly in increasing destination attractiveness (Gelbman & Timothy, 2011:110) and the same is true in the context of Zimbabwe given that the mean score of this factor is 3.74. This factor is consistent with the findings of Formica and Uysal (2006) who proposed that destination attributes such as natural, built, and historical are key in determining the attractiveness of a tourism destination. This finding is also consistent with the findings of Vaz (2002) who concluded that the destination's attractions are the biggest determinant of the destination's attractiveness. Therefore, destination attractions are an important factor for Zimbabwe.

Group 2: Destination amenities elements
A total of 14 elements were included in this grouping for factor analysis. All the elements generated factor loadings that were above 0.3 and were thus retained for further analysis. This group split into two factors due to the fact that some elements in this group had two factor loadings. The researcher decided the factor for elements that cross-loaded. The two factors were labelled as general amenities and tourism amenities.

Table 5.9: Factor analyses for destination amenities elements

Destination amenities elements	Factor loading	Cronbach Alpha	Mean	Inter-item correlation	Cumulative variance %
Factor 1: General amenities		**0.79**	**3.57**	**0.31**	**54.2%**
Exchange rate facilities	0.694				
Communication facilities	0.688				
Sports and activities	0.670				
Destination marketing	0.652				
Destination transport facilities	0.609				
Excellent retail outlets	0.534				
Level of general services	0.481				
Destination infrastructure	0.405				
	Factor loading	Cronbach Alpha	Mean	Inter-item correlation	Cumulative variance %
Factor 2: Tourism amenities		0.71	3.72	0.33	54.2%
Destination food and beverage facilities and cuisine	0.785				
Destination accommodation	0.768				
Tourism support services	0.756				
Quality destination facilities	0.616				
Tourism friendly image	0.579				
Destination entertainment	0.580				
Note: KMO (Kaiser-Meyer-Olkin measure of sampling adequacy) = 0.72, Bartlett's test of sphericity: p<0.001. Extraction method: Principal component analysis. Rotation method: Oblimin with Kaiser normalization; analysis N = 450. Mean calculated from a minimum of 1 and a maximum of 5.					

General amenities had a mean value of 3.57 suggesting that it is a relatively important factor in defining Zimbabwe's attractiveness. The factor had a reliability alpha coefficient of 0.79, signifying a relatively high internal consistency among the factor items. The group of items classified under this factor generated an average inter-item correlation of 0.31. Table 5.9 shows that on the one hand, exchange rate facilities is an item for the general amenities factor that has the strongest association to the underlying latent variable, with a factor loading of 0.694. On the other hand, destination's infrastructure emerged from the factor analyses as an item that is marginally important in terms of general amenities (loading 0.405).

The second factor for the destination amenities group is **Tourism amenities,** which had a mean score of 3.72, also suggesting that it is an important factor in determining the attractiveness of Zimbabwe as a tourism destination. The factor generated a reliability alpha coefficient of 0.71, indicating that the items in this grouping had a relatively high internal consistency. The average inter-item correlation of the items was 0.33. Destination cuisine is the item that shows the strongest association to tourism amenities as an underlying latent variable of Zimbabwe's attractiveness as a tourism destination, with a factor loading of 0.785. This was followed by destination accommodation (loading 0.768). Destination entertainment emerged as a marginally important item of tourism amenities with a factor loading of 0.580.

Amenities are a critical element as they provide destinations with a foundation upon which the tourism industry is structured (Crouch & Ritchie, 1999). This factor has also been identified in previous studies and was deemed to be an important destination attractiveness factor (for instanceFormica & Uysal, 2006:421; Lee *et al.,* 2010:822; Reitsamer & Brunner-Sperdin, 2017:57; Vengesayi, 2005:641). Consequently, it is imperative to note that Zimbabwe's attractiveness as a tourism destination is, therefore, improved by its capability to deliver tourism amenities such as hotel accommodation, restaurants, and lodging opportunities that tourists can use at the destination. General amenities such as communication facilities, sports facilities and retail outlets etc. are also important in influencing Zimbabwe's attractiveness.

Group 3: Destination accessibility elements

The destination accessibility group had 14 elements that were initially used for factor analyses. All the 14 elements generated factor loadings that were greater than 0.3 and hence were retained for further analysis. Just like amenities, the accessibility group had elements that resulted in two factors and were labelled as external access and internal access. Similar factors were determined in a study that was conducted in Taiwan (see Lee *et al.,* 2010:819).

Empirical results in Table 5.10 show that external accessibility had a mean score of 2.60, showing that Zimbabwe is comparatively challenged in terms of external access as respondents mentioned there were no direct flights to the country's major tourist attractions from their home countries.

Table 5.10: Factor analyses of destination accessibility elements

Destination accessibility elements	Factor loading	Cronbach Alpha	Mean	Inter-item correlation	Cumulative variance %
Factor 1: External access		**0.87**	**2.60**	**0.44**	**60.7%**
Airport route available from tourist's home country	0.878				
Easy to access from country of origin	0.866				
Frequency of transportation to destination	0.849				
Drive time to Zimbabwe from home country	0.800				
Drive time between attractions in the destination	0.747				
Access to Wi-Fi/Internet	0.574				
Prices of transport and tourism services	0.473				
	Factor loading	Cronbach Alpha	Mean	Inter-item correlation	Cumulative variance %
Factor 2: Internal access		**0.75**	**3.41**	**0.31**	**60.7%**
Ease of making reservations	0.828				
Variety of public transport vehicles	0.782				
Innovative tourist destination	0.608				
State of the art technology	0.691				
Tourism friendly visa policies	0.698				
Wide access to tourist information	0.442				
Destination infrastructure	0.356				
Note: KMO (Kaiser-Meyer-Olkin measure of sampling adequacy) = 0.74, Bartlett's test of sphericity: p<0.001. Extraction method: Principal component analysis. Rotation method: Oblimin with Kaiser normalization; analysis N = 450. Mean calculated from a minimum of 1 and a maximum of 5.					

There is a need for Zimbabwe to launch direct flights to its source market. This may be a crucial intervention in building up repeat business and destination loyalty, which were discussed as low in preceding sections. Additionally, results in Table 5.10 show that the external access factor had a reliability coefficient score of 0.87, indicating that the items have relatively high internal consistency.

Ease of access from the home country had a high factor loading of 0.878, indicating that it has the strongest association with external access of the destination as an underlying latent variable. It is important for Zimbabwe to note that as a long-haul

tourist destination market, efforts must be made to ensure ease of access to its major tourist attractions. Prices of transport and tourism services were an item that emerged to be marginally important with a factor loading of 0.473.

Empirical results presented in Table 5.10 show that the internal access factor generated a mean score of 3.41, suggesting that internal accessibility of tourist attractions within Zimbabwe is an important factor in determining the attractiveness of the destination. The internal access factor generated a reliability alpha coefficient of 0.75, indicating that the items that were loaded for analyses have comparatively high internal consistency. The factor had an inter-item correlation of 0.31. Thus, within the internal access factor, the ease of making reservations generated a high loading (0.828), suggesting that the ease of making reservations has the strongest association with internal access as an underlying latent variable in determining destination attractiveness of Zimbabwe as a tourism destination.

Vengesayi (2008) considers the destination's transport networking as an important determinant of destination attractiveness. The empirical results presented in Table 5.10 above are consistent with the views of Vengesayi (2008) and Lee *et al.* (2010) who found that accessibility is a key element of destination attractiveness. Destination infrastructure emerged as a marginally important factor for internal access of Zimbabwe as a tourism destination. This can be explained by the fact that Zimbabwe enjoys a shorter length of stay and as a result, tourists are not particularly able to objectively assess this element of accessibility.

Group 4: Destination ambience elements
Table 5.11 below shows that destination ambience had a relatively high mean value of 3.93, indicating that destination ambience is an important factor in determining the attractiveness of Zimbabwe as a tourism destination. The factor had a relatively strong inter-item correlation of 0.61. Based on the mean value, destination amenities are a very important factor in determining the destination attractiveness of Zimbabwe as a tourism destination. The Cronbach's alpha coefficient of the factor was a high reliability alpha coefficient of 0.89, indicating that the items that were loaded for factor analyses had a relatively high internal consistency. This suggests that tourists perceived Zimbabwe to be an attractive destination brand based on its ambience.

Table 5.11: Factor analyses of destination ambience elements

Destination ambience elements	Factor loading	Cronbach Alpha	Mean	Inter-item correlation	Cumulative variance %
Factor 1: Destination ambience		**0.89**	**3.93**	**0.61**	**80.6%**
History and folklore	0.870				
Courtesy in the delivery of tourism services and amenities	0.857				
Offers true African experience	0.826				
Levels of service delivery	0.837				
Friendliness of residents	0.776				
Note: KMO (Kaiser-Meyer-Olkin measure of sampling adequacy) = 0.87, Bartlett's test of sphericity: $p<0.001$. Extraction method: Principal component analysis. Rotation method: Oblimin with Kaiser normalization; analysis N = 450. Mean calculated from a minimum of 1 and a maximum of 5.					

Six observable elements were loaded to this group and after the analyses; one aspect was removed because it failed to reach the minimum loading score of 0.30. The factor item that was dropped in this group was "the destination is vibrant". However, it is critical to note that the history and folklore of the destination has the strongest association with destination ambience as an underlying latent variable, with a factor loading 0.870. The friendliness of the destination's residents was considered to be marginally important with a factor loading of 0.776.

Group 5: Destination environment elements

Vengesayi (2003:641) debates that tourism and the environment are considered to be inseparable companions. A total of 7 observable elements were loaded to this group and one of the factor items was dropped after failing to load above 0.3. The factor item that was dropped from this group was "tourists have an easy access to Wi-Fi and Internet services". Destination environment as an attractiveness factor recorded a mean score of 3.54, suggesting that this factor is very important for Zimbabwe given that its tourism industry is nature based (Manwa, 2007). The factor generated a reliability alpha score of 0.71, indicating a relatively high internal consistency among the items in the group. In addition to this, the inter-item correlation of this factor was 0.27. Table 5.12 shows the empirical results of the factor analyses for destination environment elements.

Table 5.12: Factor analyses of destination environment elements

Destination environment elements	Factor loading	Cronbach Alpha	Mean	Inter-item correlation	Cumulative variance %
Factor 1: Destination environment		**0.71**	**3.54**	**0.27**	**62.3%**
Destination environmental care	0.779				
Sanitation and hygiene	0.748				
Destination's ability to respond to changing visitor needs	0.716				
Destination alliances	0.662				
Safety and security	0.444				
Commitment towards safety of tourists	0.421				
Note: KMO (Kaiser-Meyer-Olkin measure of sampling adequacy) = 0.60, Bartlett's test of sphericity: p<0.001. Extraction method: Principal component analysis. Rotation method: Oblimin with Kaiser normalization; analysis N = 450. Mean calculated from a minimum of 1 and a maximum of 5.					

Mihalic (2013) emphasises the need to take care of the destination environment because it influences destination attractiveness. Mihalic (2000) also argues that the quality of the destination environment is central to its attractiveness and likened well-managed destinations as the "best advertiser". Reitsamer, Brunner-Sperdin and Stokburger-Sauer (2016:93), argue that destination attractiveness is a demand side perspective that looks at tourism destinations as suppliers of spatial tourism services with specific destination resources and environments that must be managed efficiently. Table 5.12 indicates that destination environmental care has the strongest association with the underlying latent variable, with a factor loading of 0.779. This indicates that for Zimbabwe to achieve and maintain destination attractiveness, the destination must provide effective care of the destination environment. Commitment towards the safety of tourists emerged as marginally important for explaining the underlying relationship with the latent variable as the study was conducted during times of peace.

Group 6: Price attractiveness elements

Prices of tourism and hospitality services are important factors of destination attractiveness (Formica & Uysal, 2006; Vengesayi, 2008). Price refers to the cost incurred by the tourists when visiting a particular tourism destination (Blanke & Chiesa,

2009; Dwyer *et al.,* 2000) Table 5.13 shows that price related items as a group generated a mean score of 2.45, indicating that tourists generally perceive Zimbabwe to be an unattractive destination based on its pricing. The elements that were loaded into the price group for factor analysis generated a high reliability score of 0.80, indicating that there is a comparatively high internal consistency of the price items. The factor had an inter-item correlation of 0.45, which also showed a relatively strong linear relationship among the observed elements.

Table 5.13: Factor analyses of price attractiveness elements

Price attractiveness aspect elements	Factor loading	Cronbach Alpha	Mean	Inter-item correlation	Cumulative variance %
Factor 1: Price attractiveness		**0.80**	**2.45**	**0.45**	**76.5%**
Competitive price of tourism services	0.860				
Tax policies on tourist services	0.847				
Price of airport amenities	0.826				
Destination's price advantage	0.769				
Use of multicurrency and vacation costs	0.417				
Note: KMO (Kaiser-Meyer-Olkin measure of sampling adequacy) = 0.75, Bartlett's test of sphericity: p<0.001. Extraction method: Principal component analysis. Rotation method: Oblimin with Kaiser normalization; analysis N = 450. Mean calculated from a minimum of 1 and a maximum of 5.					

Six elements relating to the measurement of price attractiveness of Zimbabwe were loaded to this group. However, the factor item on "the destination offers value for money" was removed for failing to reach the required 0.3 loading. Pricing of tourism services in the destination show the strongest association with the underlying latent variable, with a factor loading of 0.860. This implies that tourists always perceive destinations that are reasonably priced as attractive. It is important to note that the analysis of this group included the "use of multi-currency in Zimbabwe reduces travel vacation costs" element for the first time in tourism literature and the results show that the item is marginally important in terms of determining the price attractiveness of Zimbabwe as a tourism destination.

Group 7: Destination brand positioning elements

This group had a total of 5 elements/items that were loaded for analysis and all of the aspects were retained for further analysis. The attractiveness of Zimbabwe's positioning through its destination brand name, logo and its relationship with quality and visitor experience yielded a mean score of 3.61, indicating that brand elements such as the name, logo and the ability of the tourism destination to deliver quality visitor experience are important in determining how attractive a tourism destination is. The factor generated a high reliability alpha coefficient of 0.85 that indicates there is a relatively high internal consistency between the items that were loaded into this group for factor analysis. Table 5.14 also shows that the grouping generated a strong inter-item correlation of 0.53. This factor generated the second highest reliability coefficient as well as the second highest inter-item correlation.

Table 5.14: Factor analyses of destination brand positioning elements

Destination brand positioning elements	Factor loading	Cronbach Alpha	Mean	Inter-item correlation	Cumulative variance %
Factor 1: Destination brand positioning		**0.85**	**3.61**	**0.53**	
Brand position is associated with quality and good experience	0.865				
Attractive brand value proposition	0.862				
Attractive destination logo	0.795				
Attractive destination brand name	0.750				
Ability to meet the needs of visitors	0.680				
Note: KMO (Kaiser-Meyer-Olkin measure of sampling adequacy) = 0.76, Bartlett's test of sphericity: p<0.001. Extraction method: Principal component analysis. Rotation method: Oblimin with Kaiser normalization; analysis N = 450. Mean calculated from a minimum of 1 and a maximum of 5.					

Based on the analysis of the above results, destination brand association with quality and visitor experience has the strongest relationship with the underlying latent variable, with a factor loading of 0.865, suggesting that for Zimbabwe to be attractive, the destination must position itself as a tourism destination that is able to deliver quality and give tourists good destination experience. Provision of quality products and service will result in tourist satisfaction that might help Zimbabwe to improve on repeat visitation and brand loyalty. This will, in turn, enhance Zimbabwe's attractiveness in

terms of the cost advantages that come with repeat visitation. The ability of the destination to meet the needs of visitors had the lowest factor loading of 0.680.

Group 8: Destination brand identity elements

In terms of the dimensions of a brand, identity is an internal dimension while image is an external dimension (Rode & Vallaster, 2005; Saraniemi, 2010). This group had a total of 5 elements that were observed during factor analysis. All the elements in this group were retained for further analyses. Table 5.15 show the results of the factor analyses.

Table 5.15: Factor analyses of destination brand identity

Destination brand identity elements	Factor loading	Cronbach Alpha	Mean	Inter-item correlation	Cumulative variance %
Factor 1: Destination brand identity		**0.61**	**3.45**	**0.28**	**66.8%**
Brand suitability for target audiences	0.766				
Ability to meet tourist expectations	0.694				
Destination brand awareness programmes	0.624				
Attractive destination brand positioning	0.589				
Perceived attractiveness of the Zimbabwean brand	0.323				
Note: KMO (Kaiser-Meyer-Olkin measure of sampling adequacy) = 0.60, Bartlett's test of sphericity: $p<0.001$. Extraction method: Principal component analysis. Rotation method: Oblimin with Kaiser normalization; analysis N = 450. Mean calculated from a minimum of 1 and a maximum of 5.					

Through factor analysis, this group produced a mean score of 3.45 indicating that respondents perceive destination brand identity factor to be important in determining the destination attractiveness of Zimbabwe as a tourism destination. The factor also generated a reliability score of 0.61, indicating internal consistency of items that were loaded for analyses. In addition to this, this factor also had an inter-item correlation of 0.28. The suitability of the destination brand to the target audiences has the strongest association with the underlying latent variable, with a factor loading of 0.766. Perceptions regarding the attractiveness of Zimbabwe as a destination brand are

slightly important in explaining the underlying latent variable as a measure of destination attractiveness (loading 0.323).

Group 9: Destination brand image elements

Destination brand image generated a mean score of 3.68, signifying that destination brand image is a critical factor in determining destination attractiveness. The factor had a reliability score of 0.80, which indicates that there is relatively high consistency between items that were loaded into this group. Table 5.16 shows the inter-item correlation of this factor was 0.49. A total of 3 elements were loaded for factor analysis in this group and all the elements were retained for further statistical analysis.

Table 5.16: Factor analyses of destination brand image elements

Destination brand image elements	Factor loading	Cronbach Alpha	Mean	Inter-item correlation	Cumulative variance %
Factor 1: Destination brand image		**0.80**	**3.68**	**0.49**	**88.4%**
Image influences my choice to visit Zimbabwe	0.888				
Post visit behaviour is influenced by destination image	0.808				
I choose Zimbabwe instead of competitors because of image	0.544				
Note: KMO (Kaiser-Meyer-Olkin measure of sampling adequacy) = 0.62, Bartlett's test of sphericity: $p<0.001$. Extraction method: Principal component analysis. Rotation method: Oblimin with Kaiser normalization; analysis N = 450. Mean calculated from a minimum of 1 and a maximum of 5.					

There is a symbiotic relationship between the destination's image and its attractiveness (Jiang, Ramkissoon, Mavondo & Feng, 2017; Kim & Perdue, 2011; Kresic & Prebežac, 2011; Mayo & Jarvis, 1981; Tomigová, Mendes & Pereira, 2015). Thus, tourism destination choice by tourists is greatly influenced by favourable perceptions of the destination's image (Buhalis, 2000; Govers *et al.,* 2007; Kim & Perdue, 2011; Mayo & Jarvis, 1981; Prayag, 2010). The empirical results presented in Table 5.16 also show that Zimbabwe's brand image and destination choice has the strongest association with the underlying latent variables, with a factor loading of 0.888. Post visit behaviour (loading 0.808), an item that was also discussed in Chapter 2, generated a strong association with the underlying latent variable. Zimbabwe's

image, as a destination, is marginally important in relation to the underlying latent variable, with a factor loading of 0.544. Therefore, the implication of this factor is that the better the perception of Zimbabwe as a tourism destination brand, the higher the probability of Zimbabwe to be preferred by tourists.

Group 10: Destination brand loyalty elements

San Martin, Collado and Rodriguez del Bosque (2013:327) define destination loyalty as the pledge of tourists that is commonly stated in a stable form in the long run. Tourists that are deemed as loyal to a destination have more chance of revisiting the destination in future and enhance the destination's image through positive WOM recommendations (Petrick, 2014). As a result, it is a frequently investigated construct in a number of tourism contexts.

Destination brand loyalty yielded a mean score of 3.70, implying that tourists are loyal to Zimbabwe as an attractive tourism destination. The factor had a reliability coefficient of 0.81, suggesting a high level of internal consistency among the items that were loaded into this group during factor analysis. Table 5.17 shows an inter-item correlation of the destination brand loyalty factor was 0.45. Three elements were loaded for factor analyses and all the elements were thus retained for further statistical analysis.

The empirical results presented in Table 5.17 also show that the intention for the tourists to revisit has the strongest association with the underlying latent variables, with a factor loading of 0.800. Speaking well about the destination is also strong in explaining the underlying latent variable (loading 0.788), an item which resonates well with the descriptive results, showing a lot of tourists have heard about Zimbabwe from WOM. Intention to recommend is also marginally important in relation to the underlying latent variable, with a factor loading of 0.653. Therefore, the implication of this factor is that the better the perception of Zimbabwe as a tourism destination brand, the higher the probability of Zimbabwe to be preferred by tourists.

Table 5.17: Factor analyses of destination brand loyalty elements

Destination brand loyalty elements	Factor loading	Cronbach Alpha	Mean	Inter-item correlation	Cumulative variance %
Factor 1: Destination brand loyalty		**0.81**	**3.70**	**0.45**	**78.4%**
Intention to revisit in the future	0.800				
Speaking well about destination to family and friends	0.788				
Intention to recommend destination	0.653				
Note: KMO (Kaiser-Meyer-Olkin measure of sampling adequacy) = 0.62, Bartlett's test of sphericity: *p<0.001.* *Extraction method: Principal component analysis. Rotation method: Oblimin with Kaiser normalization; analysis N = 450. Mean calculated from a minimum of 1 and a maximum of 5.*					

Table 5.18 below provides a summary of these factors. The most important factors that were found to influence destination attractiveness as per the results of this factor analyses are summarised in Table 5.18 below. The initial 10 groups resulted in 12 factors related to destination attractiveness.

Table 5.18: A summary of important factors and elements

Factors	Factor items	Factor loading	Mean score
Destination attractions	Built attractions	0.803	3.74
	Archaeological attractions	0.709	
	Historical attractions	0.701	
General amenities	Support services	0.756	3.57
Tourism amenities	Food and beverage facilities and cuisine	0.785	3.72
	Accommodation facilities	0.768	
External access	Easy access to destination	0.866	2.60
	Direct airport route from home country	0.878	
	Short drive time to destination	0.800	
Internal access	Making reservations	0.828	3.41
Destination ambience	History and folklore	0.870	3.93
	Delivery of tourism services	0.857	
	Destination's African experience	0.826	
	Level of service delivery	0.837	
Destination environment	Destination environmental care	0.779	3.54
	Level of sanitation and hygiene	0.748	

Price attractiveness	Price of tourism services	0.860	2.45
	Tax policies on tourism services	0.847	
	Prices of airport amenities	0.826	
Destination brand positioning	Brand association and experience	0.865	3.61
	Destination brand value	0.862	
Destination brand identity	Suitability of brand to target audience	0.766	3.45
Destination brand image	Brand image and destination choice	0.888	3.68
	Destination image influence decision	0.868	
	Post visit behaviour	0.808	
Destination brand loyalty	Intention to revisit in the future	0.800	3.70
	Speaking good about destination to family and friends	0.788	

Destination attractiveness assessment, particularly in terms of the exploratory analyses of the important factors, is imperative for Zimbabwe to understand tourists' behaviour and destination choice (Awaritefe, 2004) and their perceived destination brand image of Zimbabwe. The most important destination attractiveness factors in the empirical context of brand Zimbabwe as a tourism destination were found to be destination ambiance, destination attractions and tourism amenities. These factors are important for Zimbabwean tourism, especially in the formulation of strategic destination marketing policies as this allows the destination to make comparisons with competition (Enright & Newton, 2005; Mihalic, 2000). An understanding of the important destination attractiveness factors will help Zimbabwean tourism in matching the tourists' perceptions and improve the brand's satisfying elements.

The results obtained in the factor analyses provide confirmation of convergent validity and as a result, established construct validity of the demand survey instrument that was employed for the survey. The reliability coefficients of all the factors were above 0.50 and confirmed evidence of the reliability of the scales used to measure the factors on destination attractiveness. Further analyses were considered based on the reliability scores and the convergence of data as shown above.

5.4.2 Relationships between destination attractiveness factors

The study employed the use of Spearman's rank correlations to describe the linear relationship between two destination attractiveness variables. The correlation coefficients range from the value of -1 to +1.

- -1 represents a perfect negative relationship;
- +1 represents a positive perfect relationship

The study interpreted the correlations based on the guidelines that were produced by Cohen (1988) that suggests that:

- *rho = 0.10 – 0.30 represents a small significant relationship;*
- *rho = 0.30 – 0.50 indicates a medium significant relationship;*
- *rho = 0.5 – 1.0 indicates a large significant relationship among variables.*

The results of the Spearman's rank order correlations are presented in Table 5.19 below. Empirical findings from the demand side data showed that large significant correlations *(rho = 0.50 -1.0)* existing between destination attractiveness factors as indicated in Table 5.19 were noted as follows:

- Destination brand identity and destination brand positioning (*rho = 0.555; p < 0.001*), a finding consistent with the conclusions of Michelson and Paadam (2016:144). Based on the analysis of the results, it is clear that a majority of destination attractiveness factors are closely related and affect one another. A large significant relationship (*rho = 0.555; p < 0.001*), between destination brand identity and destination brand positioning implies that destination brand identity has a great influence on destination brand positioning. If Zimbabwe as a destination has a good destination brand identity, it will contribute to a positive destination brand position and attract more tourists. Therefore, the destination managers in Zimbabwe must strive to creative a positive destination brand identity.

Medium significant correlations *(rho = 0.30 – 0.49)* that exist between destination attractiveness factors as indicated in Table 5.19:

- Tourism amenities and general amenities (*rho = 0.452; p < 0.001);*
- Destination brand loyalty and destination brand image *(rho = 0.449; p < 0.001);*

- Destination brand image and destination brand positioning *(rho = 0.430; p < 0.001);*
- Destination environment and general amenities *(rho = 0.411; p < 0.001);*
- Internal access and general amenities *(rho =0.403; p < 0.001);*
- Destination brand image and ambience *(rho =0.396; p < 0.001)*;
- Destination environment and internal access *(rho = 0.390; p < 0.001);*
- Destination environment and external access *(rho =0.368; p < 0.001);*
- Destination brand identity and destination environment *(rho = 0.362; p < 0.001);*
- Destination brand positioning and ambience *(rho = 0.338; p < 0.001);*
- Destination brand identity and internal access *(rho = 0.300; p < 0.001).*

The empirical results indicate moderate monotonic relationships between destination attractiveness variables. There are small significant correlations *(rho = 0.10 – 0.29*) that exist between destination attractiveness factors, as indicated in Table 5.19:
- Ambiance and external access *(rho = 0.294; p < 0.001);*
- Destination brand positioning and tourism amenities *(rho = 0.274; p < 0.001);*
- General amenities and attractions (*rho = 0.261; p < 0.001);*
- Tourism amenities and attractions (*rho = 0.257; p < 0.001);*
- Price and internal access *(rho = 0.255; p < 0.001).*
- Destination brand image and general amenities *(rho =0.254; p < 0.001).*

A negative correlation is a relationship that shows that as one variable increases, the other variable decreases. There were notable negative relationships between some demand factors with price, and they are summarised as follows:
- Destination brand image and price *(rho = -0.169; p < 0.001)* - consistent with the findings of Konecnik and Gartner (2007). Therefore, as price increases, Zimbabwe's destination image decreases. Therefore, the attractiveness of Zimbabwe is generally affected by the prices that are charged.

Table 5.19: Correlations matrix for demand factors (destination attractiveness factors)

		DA	GE	TE	EA	IA	DA*	DE	PA	DBP	DBI	DBI*	DBL
Destination attractions (DA)	Correlation Coefficient	1.000											
	Sig. (2-tailed)												
	N	450											
General amenities (GE)	Correlation Coefficient	.261**	1.000										
	Sig. (2-tailed)	0.000											
	N	450	450										
Tourism amenities (TE)	Correlation Coefficient	.257**	.452**	1.000									
	Sig. (2-tailed)	0.000	0.000										
	N	450	450	450									
External access (EA)	Correlation Coefficient	-.156**	.181**	-0.065	1.000								
	Sig. (2-tailed)	0.001	0.000	0.169									
	N	450	450	450	450								
Internal access (IA)	Correlation Coefficient	.153**	.403**	.212**	.161**	1.000							
	Sig. (2-tailed)	0.001	0.000	0.000	0.001								
	N	450	450	450	450	450							
Destination Ambiance	Correlation Coefficient	.246**	.097*	0.087	.294**	0.001	1.000						

(DA*)	Sig. (2-tailed)	0.000	0.039	0.065	0.000	0.981							
	N	450	450	450	450	450	450						
Destination environment (DE)	Correlation Coefficient	.148**	.411**	.191**	.368**	.390**	.173**	1.000					
	Sig. (2-tailed)	0.002	0.000	0.000	0.000	0.000	0.000						
	N	450	450	450	450	450	450	450					
Price attractiveness (PA)	Correlation Coefficient	-0.053	.178**	-0.021	0.056	.255**	-.149**	.203**	1.000				
	Sig. (2-tailed)	0.266	0.000	0.656	0.238	0.000	0.002	0.000					
	N	450	450	450	450	450	450	450	450				
Destination brand positioning (DBP)	Correlation Coefficient	.175**	.201**	.274**	.207**	.145**	.338**	.238**	-.099*	1.000			
	Sig. (2-tailed)	0.000	0.000	0.000	0.000	0.002	0.000	0.000	0.036				
	N	450	450	450	450	450	450	450	450	450			
Destination brand identity (DBI)	Correlation Coefficient	.191**	.225**	.162**	.098*	.300**	.145**	.362**	.292**	.555**	1.000		
	Sig. (2-tailed)	0.000	0.000	0.001	0.039	0.000	0.002	0.000	0.000	0.000			
	N	450	450	450	450	450	450	450	450	450	450		
Destination brand image (DBI*)	Correlation Coefficient	.162**	.254**	.131**	.222**	0.040	.396**	.159**	-.169**	.430**	.123**	1.000	
	Sig. (2-tailed)	0.001	0.000	0.005	0.000	0.401	0.000	0.001	0.000	0.000	0.009		
	N	450	450	450	450	450	450	450	450	450	450	450	
Destination brand loyalty	Correlation Coefficient	0.061	.131**	.114*	.186**	0.031	.181**	.164**	-.222**	.151**	-.107*	.449**	1.000
	Sig. (2-tailed)	0.193	0.005	0.016	0.000	0.516	0.000	0.000	0.000	0.001	0.023	0.000	
	N	450	450	450	450	450	450	450	450	450	450	450	450

- Destination brand loyalty and price *(rho = -0.222; p < 0.001)* - consistent with the findings of Konecnik and Gartner (2007), indicating that an increase in price results in a decrease in destination brand loyalty. This relationship also explains why Zimbabwe receives a relatively low number of repeat visitors. The price of tourism services in Zimbabwe affects repeat visitation as the country becomes more unattractive. This has negative implications for Zimbabwe, given that other tourism destinations in the region have been found to be close substitutes. The country could be losing more customers because of prices of tourism related services.

In summary, it is clear that there is a large significant relationship between destination brand identity and destination brand positioning, a finding that is consistent with Michelson and Paadam (2016:144). Medium significant correlations were also observed between a number of variables such as tourism amenities and general amenities; destination brand loyalty and destination brand image. Negative correlations were also observed between some demand factors such as destination brand image, destination brand loyalty with price. Thus, the results imply that all the destination attractiveness factors that were used in this study are important to ensure the attractiveness of Zimbabwe as a destination.

5.4.3 Aspects influencing destination attractiveness

This section of the chapter discusses the results of the survey based on the comparisons of statistical differences between female and male respondents with regard to the aspects influencing destination attractiveness in the context of Zimbabwe as a tourism destination. One-way analysis of variance (ANOVA) is employed when two or more groups exist and the researcher wants to compare their mean scores on a continuous variable (Pallant, 2010:105).

a. Comparison of aspects influencing destination attractiveness by gender

In an attempt to determine the statistical differences of the mean values of the variables in terms of the attractiveness of brand Zimbabwe as a tourism destination, *t*-tests were performed (Malhotra *et al.,* 2013:499; Zikmund *et al.,* 2010:564). The study used independent *t*-tests to measure the differences using the gender of the respondents.

According to Cohen (1988), cited in Gignac and Szodorai (2016:74), effect sizes are categorised as:

- 0.1 explains trivial effect;
- 0.1 – 03 explains small effect;
- 0.3 – 0.5 explains moderate effect;
- >0.5 explains quite a large effect.

Table 5.20: t-tests of gender vs. destination attractiveness factors

Variable	Gender	N	Mean	Std. Dev	p-value	Effect sizes
Destination attractions	Female	252	3.71	± 0.45	0.222	0.11**
	Male	198	3.77	± 0.47		
General amenities	Female	252	3.56	± 0.47	0.585	0.05*
	Male	198	3.58	± 0.42		
Tourism amenities	Female	252	3.74	± 0.46	0.516	0.06*
	Male	198	3.71	± 0.42		
External accessibility	Female	252	2.60	± 0.84	0.909	0.01*
	Male	198	2.60	± 0.92		
Internal accessibility	Female	252	3.38	± 0.54	0.296	0.10**
	Male	198	3.43	± 0.51		
Destination ambiance	Female	252	3.93	± 0.47	0.736	0.03*
	Male	198	3.92	± 0.45		
Destination environment	Female	252	3.54	± 0.45	0.970	0.00*
	Male	198	3.53	± 0.47		
Price attractiveness	Female	252	2.46	± 0.70	0.573	0.05*
	Male	198	2.43	± 0.70		
Destination brand positioning	Female	252	3.63	± 0.52	0.552	0.05*
	Male	198	3.60	± 0.48		
Destination brand identity	Female	252	3.44	± 0.44	0.573	0.05*
	Male	198	3.46	± 0.44		
Destination brand image	Female	252	3.72	± 0.76	0.205	0.11*
	Male	198	3.63	± 0.69		

| Destination brand loyalty | Female | 252 | 4.43 | ± 0.67 | 0.441 | 0.07 |
| | Male | 198 | 4.39 | ± 0.64 | | |

Statistically significant difference: p≤0.05 (Sullivan & Feinn, 2012:281); Effect sizes key: *d=0.1: trivial effect; ** d=0.1-0.3 small effect; *** d=0.3-0.5: moderate effect; ****d>0.5 large effect

Table 5.20 illustrates that there were no statistical significant differences between female and male respondents in terms of their assessment about destination attractiveness of brand Zimbabwe. This is crucial for Zimbabwe, as it will use undifferentiated destination marketing messages for both male and female. However, the most important attractiveness factors for female tourists were destination ambience ($\bar{x}$ =3.93; SD = ± 0.47); tourism amenities ($\bar{x}$ =3.74; SD = ± 0.46); destination brand image ($\bar{x}$ = 3.72; SD = ± 0.76) and destination attractions ($\bar{x}$ =3.71; SD = ± 0.45). On the other hand, the most important attractiveness factors for male tourists were destination ambience ($\bar{x}$ = 3.92; SD = ± 0.45), destination attractions ($\bar{x}$ = 3.77; SD = ± 0.47) and tourism amenities ($\bar{x}$ = 3.71; SD = ± 0.42). In addition to this, the analysis of data shows that female tourists are a slightly more loyal segment of the Zimbabwean tourism market than male tourists are ($\bar{x}$ = 4.43; SD = ± 0.67). Therefore, Zimbabwe must come up with ways that will keep the loyal tourists as it has marketing related advantages.

The next section discusses the empirical results about the aspects that influence destination attractiveness of Zimbabwe as a tourism destination by comparing the statistical differences based on the respondents' continent of residence.

b. Comparison of destination attractiveness factors by continent of residence
ANOVAs were conducted to assess destination attractiveness using continent of residence. Post-hoc tests were drawn and they indicated practical and statistical significant differences between Zimbabwe's source markets (that is, by continent of residence) and the destination attractiveness factors as well as the effect sizes for the concerned differences. Statistical significance is indicated by the *p*-value of *p < 0.05* (Field, 2013:72). Four statistically significant differences occurred between destination's source markets and general amenities (*p < 0.05*); external access (*p = 0.01*); destination ambiance (*p < 0.05*); and destination brand image (*p = 0.01*) as shown in Table 5.21.

The empirical results presented in Table 5.21 show that respondents residing in the Asian continent ($\bar{x}$ = 3.64; SD = ± 0.46) rated Zimbabwe's general amenities higher than those from Africa ($\bar{x}$ = 3.59; SD = ± 0.42) with an effect size of 0.12 (small effect); Asian respondents also rated Zimbabwe's general amenities higher than respondents from South America ($\bar{x}$ = 3.38; SD = ±0.61) with an effect size of 0.42 (moderate effect); Europe ($\bar{x}$ = 3.49; SD = ± 0.46) with an effect size of 0.33 (moderate effect); Australians ($\bar{x}$ = 3.70; SD = ± 0.37) rated general amenities higher than respondents the were drawn from South Americans ($\bar{x}$=3.38; SD=± 0.61) with an effect size of 0.53 (large effect). Thus, these results imply that central to the demand of a destination brand relative to the continent of residence, the requirement for the success of Zimbabwe as an attractive tourism destination hinges on the availability as well as the level of general amenities for travellers and this finding is consistent with the findings of Reitsamer, Brunner-Sperdin and Stokburger-Sauer (2016:93).

Previous studies used accessibility as an influence of destination attractiveness under the natural features factor (Kresic & Prebežac, 2011:508). This study, however, found that internal access and external access are two separate destination attractiveness factors. By means of ANOVAs, external access was found to be statistically significant and it was rated highest among African respondents ($\bar{x}$=2.80; SD= ±0.98) as compared to respondents from other continents. The following effect of sizes were observed between respondents as discussed below:

- African respondents ($\bar{x}$=2.80; SD= ±0.98) rated the external access of Zimbabwe as a tourism destination higher than respondents whose continent of origin was Europe ($\bar{x}$ =2.41; SD=±0.73) with an effect size of 0.4 (moderate effect);
- African respondents ($\bar{x}$=2.80; SD = ±0.98) also rated external access of Zimbabwe as a tourism destination higher when compared with Asian respondents ($\bar{x}$=2.60; SD = ±0.89) with an effect size of 0.21 (small effect);
- African respondents ($\bar{x}$=2.80; SD= ±0.98) rated the destination's external access higher when compared with the South Americans ($\bar{x}$ = 2.51; SD = ±0.92) the effect size of this difference was a moderate (0.3) (c.f. Table 5.21).

These results imply that Zimbabwe enjoys a default external access mainly because of proximity it has with its major African markets such as South Africa, Botswana, Namibia and Zambia, for example. In addition, it can also be explained by saying that Southern African tourists, for example, are able to get visas on arrival in Zimbabwe. This makes Zimbabwe's external access attractive. However, Zimbabwe appears to be more difficult to access from Europe, Asia and the Americas. The differences in perception of external access of Zimbabwe as a tourism destination is attributable to the fact that it has no direct flights or there are no direct flights to and from the major cities of Europe, Asia and the Americas. It might also imply challenges in terms of visas.

Destination ambiance is another destination attractiveness that had a *p*-value of statistical significance. The following effects of sizes on destination ambiance were observed between respondents from:

- South America ($\bar{x}$ = 4.14; SD = ± 0.55) rated destination ambience higher than respondents from Europe ($\bar{x}$ = 3.84; SD = 0.44), with a large effect size of *d = 0.55*.
- Australian respondents ($\bar{x}$ = 4.05; SD = ±0.44) rated destination ambience higher than respondents from Europe ($\bar{x}$ = 3.84; SD = ±0.44) with an effect size of 0.47 (moderate effect).
- South America ($\bar{x}$ = 4.14; SD = ±0.55) rated destination ambiance higher than respondents from North America ($\bar{x}$ = 3.92; SD = ±0.45) with a moderate effect size of 0.41;
- Europe ($\bar{x}$=3.84; SD=± 0.44) rated destination ambience higher than respondents from Asia ($\bar{x}$ =3.43; SD=±0.46) with a moderate effect size of *d = 0.35.*
- South America respondents ($\bar{x}$ =4.14; SD= ±0.55) rated the destination ambience higher than Africa ($\bar{x}$=3.96; SD=±0.48) with an effect size of 0.34 (moderate effect).

Therefore, these results imply that continent of residence has an influence on the tourists' perceptions about the attractiveness of destination ambience in the context of

Zimbabwe as a tourism destination. Using the mean of importance scores, respondents from the American continent (both South America ($\bar{x}$ =4.14; SD= ±0.55) and North America) perceive the destination ambiance of Zimbabwe to be more attractive than other continents. Consequently, Zimbabwe can actually segment the tourism market based on the perception of the visitors using continent of residence. This would also imply the development of separate marketing and branding messages for the American, European, Asian and African markets, given their varied perceptions with regards to the destination's ambience.

Destination ambiance is a significant factor that tourists consider in their evaluation of attractiveness in the context of Zimbabwe. Based on this variation, Zimbabwe needs to ensure that it incorporates issues of destination ambience in its destination branding and marketing messages mainly for the South and North American markets. Events such as festivals and carnivals can also be developed to enhance the ambiance of the Zimbabwean destination.

Another destination attractiveness factor that tested statistically significant was destination brand image (c.f. Table 5.21). This finding is consistent with Jönsson and Devonish (2008) who note that the level of destination attractiveness is largely influenced by the destination's image and *vice versa*. Thus, tourists' choice of Zimbabwe as a tourism destination is greatly influenced by the perceptions of the destination's image. This finding is consistent with literature (see, Kim & Perdue, 2011; Prayag, 2010; Mayo & Jarvis, 1981).

The effect sizes between respondents from various continents with regard to Zimbabwe's destination brand image are as follows:

- Respondents from Australia ($\bar{x}$ = 4.29; SD = ±0.50) rated destination brand image higher than respondents fromSouth America ($\bar{x}$=3.50; SD=±0.86), with a large effect size of 0.92;
- Respondents from Australia ($\bar{x}$ =4.29; SD=±0.50) rated destination brand image higher than respondents from Africa ($\bar{x}$=3.67; SD =±0.69) with a large effect size of 0.89;

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- Respondents from Australia ($\bar{x}$=4.29; SD=±0.50) rated destination brand image higher than respondents from North America ($\bar{x}$=3.73; SD=±0.76) with an effect size of 0.74 (large effect);

- Respondents from Australia ($\bar{x}$ = 4.29; SD = ±0.50) rated destination brand image higher than those from Asia ($\bar{x}$ = 3.82; SD = ±0.70) with an effect size of 0.68 (large effect).

Based on the analysis of these empirical results, there is not much variation when looking at the means of importance scores for the respondents' perceptions with regard to the image of Zimbabwe. However, the Asian market perceives the image of Zimbabwe much better when compared with Europeans, South Americans, and North Americas. This could be attributable to the stance between African and Asian countries with European and American continents. After its disputed land reform programme and contested elections, Zimbabwe found sympathy with a majority of Asian countries whose perceptions could have been influenced. Following the warnings from American and European governments to their citizens regarding Zimbabwe, being an unsafe destination, China, in the Asian continent, was the first to give Zimbabwe an "Approved Safe Destination Status" (Zhou, 2016). This might have contributed to its positive image perceptions.

Table: 5.21: ANOVA: Comparison of destination attractiveness by continent

		N	Mean	Std. Dev	F	Sig.	Effect size				
							Asia with	Africa with	North America with	South America with	Europe with
Attractions	Asia	61	3.75	±0.45	0.915	0.47					
	Africa	148	3.75	±0.43			0.01*				
	North America	81	3.73	±0.49			0.04*	0.03*			
	South America	14	3.89	±0.45			0.31***	0.32***	0.32***		
	Europe	134	3.69	±0.47			0.13**	0.12**	0.09*	0.42***	
	Australia	12	3.90	±0.49			0.3***	0.31**	0.34***	0.01*	0.42***
General amenities	Asia	61	3.64	±0.46	2.262	**0.05**					
	Africa	148	3.59	±0.42			0.12**				
	North America	81	3.63	±0.43			0.03*	0.09*			
	South America	14	3.38	±0.61			0.42***	0.34***	0.4***		
	Europe	134	3.49	±0.46			0.33***	0.22**	0.3***	0.18**	
	Australia	12	3.70	±0.37			0.14**	0.28**	0.18**	**0.53******	0.47***
Tourism recreation amenities	Asia	61	3.81	±0.42	1.301	0.26					
	Africa	148	3.75	±0.40			0.13**				
	North America	81	3.74	±0.46			0.16**	0.04*			
	South America	14	3.73	±0.58			0.14**	0.04*	0.01*		

	Europe	134	3.65	±0.45			0.35***	0.22**	0.18**	0.13**	
	Australia	12	3.73	±0.57			0.13**	0.03*	0.01*	0.01*	0.14**
External access	Asia	61	2.59	±0.89							
	Africa	148	2.80	±0.98			0.21**				
	North America	81	2.53	±0.84	3.084	**0.01**	0.07*	0.27**			
	South America	14	2.51	±0.92			0.09*	0.3**	0.03*		
	Europe	134	2.41	±0.73			0.2**	0.4***	0.14**	0.1*	
	Australia	12	2.79	±0.83			0.22**	0.02*	0.3***	0.3***	**0.45*** **
Internal access	Asia	61	3.44	±0.48							
	Africa	148	3.46	±0.52			0.04*				
	North America	81	3.40	±0.52	1.439	0.20	0.08*	0.13**			
	South America	14	3.17	±0.56			0.48***	0.52****	0.4***		
	Europe	134	3.35	±0.55			0.17**	0.21**	0.09*	0.31***	
	Australia	12	3.52	±0.31			0.17**	0.12**	0.24**	0.62****	0.33***
Destination Ambiance	Asia	61	4.00	±0.41							
	Africa	148	3.96	±0.48			0.08*				
	North America	81	3.92	±0.45	2.165	**0.05**	0.18**	0.08*			
	South America	14	4.14	±0.55			0.26**	0.34***	0.41***		
	Europe	134	3.84	±0.44			0.35***	0.24**	0.17**	**0.55**** **	
	Australia	12	4.05	±0.44			0.12**	0.19**	0.29**	0.17**	0.47***
	Asia	61	3.57	±0.50	1.068	0.38					

	Region	N	Mean	SD	F	p	Asia	Africa	N. America	S. America	Europe
Destination environment	Africa	148	3.58	±0.44			0.01*				
	North America	81	3.55	±0.47			0.04*	0.06*			
	South America	14	3.37	±0.71			0.28**	0.29**	0.26**		
	Europe	134	3.48	±0.42			0.17**	0.22**	0.15**	0.16**	
	Australia	12	3.56	±0.50			0.02*	0.03*	0.02*	0.27**	0.16**
Price attractiveness	Asia	61	2.37	±0.77							
	Africa	148	2.39	±0.68			0.01*				
	North America	81	2.53	±0.73	0.941	0.45	0.2**	0.2**			
	South America	14	2.54	±0.83			0.2**	0.19**	0.02*		
	Europe	134	2.48	±0.64			0.14**	0.14**	0.07*	0.08*	
	Australia	12	2.67	±0.70			0.38***	0.4***	0.19**	0.15**	0.26**
Destination brand positioning	Asia	61	3.66	±0.61							
	Africa	148	3.63	±0.45			0.04*				
	North America	81	3.66	±0.45	1.468	0.20	0.01*	0.07*			
	South America	14	3.64	±0.81			0.02*	0.02*	0.02*		
	Europe	134	3.53	±0.49			0.21**	0.21**	0.27**	0.14**	
	Australia	12	3.82	±0.46			0.26**	0.4***	0.33***	0.22**	0.59***
Destination brand identity	Asia	61	3.43	±0.46							
	Africa	148	3.52	±0.44	1.928	0.10	0.19**				
	North America	81	3.40	±0.43			0.06*	0.27**			
	South America	14	3.39	±0.36			0.08*	0.29**	0.02*		

		N	Mean	SD	F	p					
	Europe	134	3.40	±0.43			0.08*	0.28**	0.01*	0.01*	
	Australia	12	3.65	±0.46			0.46***	0.27**	0.53****	0.55****	0.55****
Destination brand image	Asia	61	3.82	±0.70	2.963	**0.01**					
	Africa	148	3.67	±0.69			0.2**				
	North America	81	3.73	±0.76			0.12**	0.07*			
	South America	14	3.50	±0.86			0.37***	0.2**	0.26		
	Europe	134	3.57	±0.76			0.32***	0.14**	0.2**	0.08*	
	Australia	12	4.29	±0.50			**0.68****	**0.89****	**0.74****	**0.92****	**0.95****
Destination brand loyalty	Asia	61	4.51	±0.57	1.264	0.28					
	Africa	148	4.48	±0.60			0.05*				
	North America	81	4.37	±0.69			0.2**	0.15**			
	South America	14	4.29	±0.70			0.32***	0.27**	0.12**		
	Europe	134	4.32	±0.72			0.25**	0.21**	0.06*	0.05*	
	Australia	12	4.29	±0.54			0.38***	0.31***	0.11**	0.01*	0.05*

Statistically significant difference: $p \leq 0.05$ (Sullivan & Feinn, 2012:281); Effect sizes key: *d=0.1: trivial effect; ** d=0.1-0.3 small effect; *** d=0.3-0.5: moderate effect; ****d>0.5 large effect

From the above results, it is clear that respondents from different origins differ in the way they evaluate the attractiveness of destination brand image of Zimbabwe. Destination brand image is connected to destination selection intention and tourist satisfaction (Vengesayi, 2003:644; Kim & Perdue, 2011; Kresic & Prebežac, 2011; Jiang *et al.,* 2016:61). Grounded on this analysis, the study concludes that Zimbabwe's capability as a tourism destination to lure visitors and compete internationally is related with its brand image. Factors affecting Zimbabwe's brand image, as suggested by the relationship between destination attractiveness factors like price, must be improved. This will help Zimbabwe remain attractive to tourists from South America, Australia, Africa, North America and Asia, for instance.

c. Comparison of destination attractiveness factors by age

The study used the respondents' age to determine significant statistical differences in relation to the destination attractiveness factors of Zimbabwe as a tourism destination. Only one statistical significant difference occurred among the respondents as shown in the Table 5.22 below.

Table: 5.22: ANOVA: comparisons of destination attractiveness by age

		N	Mean	Std. Dev	F	Sig.	Effect sizes			
Attractions	17 -25 years	34	3.81	±0.43	0.829	0.51				
	26 -35 years	100	3.72	±0.46			0.01			
	36 -55 years	151	3.71	±0.42			0.01	0.01		
	56 -79 years	155	3.76	±0.51			0.02	0.01	0.01	
	>80 years	10	3.89	±0.24			0.12	0.03	0.01	0.01
	Total	450	3.74	±0.46						
General amenities	17 -25 years	34	3.64	±0.40	0.872	0.48				
	26 -35 years	100	3.5	±0.48			0.01			
	36 -55 years	151	3.57	±0.41			0.01	0.01		
	56 -79 years	155	3.59	±0.47			0.02	0.01	0.01	
	>80 years	10	3.59	±0.28			0.12	0.03	0.01	0.01
	Total	450	3.57	±0.45						
	17 -25 years	34	3.76	±0.49	1.459	0.21				

		N	Mean	±SD						
Tourism amenities	26 -35 years	100	3.67	±0.42			0.01			
	36 -55 years	151	3.77	±0.40			0.01	0.01		
	56 -79 years	155	3.7	±0.49			0.02	0.01	0.01	
	>80 years	10	3.92	±0.32			0.12	0.03	0.01	0.01
	Total	450	3.73	±0.44						
External access	17 -25 years	34	2.51	±1.02	0.609	0.66				
	26 -35 years	100	2.66	±0.89			0.01			
	36 -55 years	151	2.64	±0.88			0.01	0.01		
	56 -79 years	155	2.57	±0.85			0.02	0.01	0.01	
	>80 years	10	2.3	±0.55			0.12	0.03	0.01	0.01
	Total	450	2.6	±0.88						
Internal access	17 -25 years	34	3.3	±0.55	0.653	0.63				
	26 -35 years	100	3.41	±0.51			0.01			
	36 -55 years	151	3.42	±0.54			0.01	0.01		
	56 -79 years	155	3.4	±0.53			0.02	0.01	0.01	
	>80 years	10	3.57	±0.22			0.12	0.03	0.01	0.01
	Total	450	3.41	±0.52						
Ambiance	17 -25 years	34	4.03	±0.52	0.783	0.54				
	26 -35 years	100	3.9	±0.44			0.01			
	36 -55 years	151	3.94	±0.43			0.01	0.01		
	56 -79 years	155	3.93	±0.49			0.02	0.01	0.01	
	>80 years	10	3.78	± 0.48			0.12	0.03	0.01	0.01
	Total	450	3.93	±0.46						
Destination environment	17 -25 years	34	3.63	±0.59	1.39	0.24				
	26 -35 years	100	3.47	±0.43			0.01			
	36 -55 years	151	3.57	±0.44			0.01	0.01		
	56 -79 years	155	3.54	±0.46			0.02	0.01	0.01	
	>80 years	10	3.36	±0.36			0.12	0.03	0.01	0.01
	Total	450	3.54	±0.46						
Price attractiveness	17 -25 years	34	2.51	±0.76	3.334	0.01				
	26 -35 years	100	2.35	±0.58			0.01			
	36 -55 years	151	2.43	±0.74			0.01	0.01		

		N	Mean	±SD						
	56 -79 years	155	2.56	±0.69			0.02	0.01	0.01	
	>80 years	10	1.86	±0.65			0.12	0.03	0.01	0.01
	Total	450	2.45	±0.70						
Destination Brand positioning	17 -25 years	34	3.61	±0.45	0.616	0.65				
	26 -35 years	100	3.55	±0.48			0.01			
	36 -55 years	151	3.61	±0.53			0.01	0.01		
	56 -79 years	155	3.65	±0.51			0.02	0.01	0.01	
	>80 years	10	3.7	±0.36			0.12	0.03	0.01	0.01
	Total	450	3.61	±0.50						
Destination Brand identity	17 -25 years	34	3.47	±0.42	0.412	0.8				
	26 -35 years	100	3.45	±0.40			0.01			
	36 -55 years	151	3.42	±0.45			0.01	0.01		
	56 -79 years	155	3.46	±0.47			0.02	0.01	0.01	
	>80 years	10	3.58	±0.33			0.12	0.03	0.01	0.01
	Total	450	3.45	±0.44						
Destination Brand image	17 -25 years	34	3.74	±0.88	1.212	0.30				
	26 -35 years	100	3.69	±0.68			0.01			
	36 -55 years	151	3.58	±0.69			0.01	0.01		
	56 -79 years	155	3.76	±0.78			0.02	0.01	0.01	
	>80 years	10	3.8	±0.63			0.12	0.03	0.01	0.01
	Total	450	3.68	±0.73						
Destination Brand loyalty	17 -25 years	34	4.63	±0.51	1.206	0.31				
	26 -35 years	100	4.37	±0.61			0.01			
	36 -55 years	151	4.41	±0.69			0.01	0.01		
	56 -79 years	155	4.39	±0.68			0.02	0.01	0.01	
	>80 years	10	4.3	±0.71			0.12	0.03	0.01	0.01
	Total	450	4.41	±0.66						

Statistically significant difference: p≤0.05 (Sullivan & Feinn, 2012:281); *Effect sizes key: *d=0.1: trivial effect; ** d=0.1-0.3 small effect; *** d=0.3-0.5: moderate effect; ****d>0.5 large effect*

Price was the only destination attractiveness factor that had a *p*-value of statistical significance (*p = 0.01*). Vengesayi (2003) argues that the price of lodgings is a key influence of destination attractiveness, and thus this finding is consistent with such

views. Respondents who were aged 17-25 years ($\bar{x}$=2.51; SD=±0.76), rated the destination's price attractiveness more important than those who were 80 years and above ($\bar{x}$=1.86; SD=±0.65), yet with a small effect of $d = 0.12$. Therefore, this group disagreed more with the price aspects and are not willing to pay higher prices for Zimbabwean tourism experiences. The younger tourists agree more with the price questions and are, therefore, more positive than the older tourism market. Therefore, it is important for Zimbabwe to pay attention to the younger tourist market because it is more price inelastic than the older tourists, who are believed to have less financial commitments. Additionally, it could also be that younger visitors have not been exposed to other places more attractive than Zimbabwe. However, it is important to note that the younger tourists to Zimbabwe do not form the bulk of the market.

d. Comparison of destination attractiveness factors by level of education

The comparisons that were made in terms of the level of education and destination attractiveness using ANOVAs generated four statistical significant differences. Statistical significant differences occurred between the level of education and tourism amenities ($p = 0.05$). The effect of sizes between those who had no schooling when compared with the educated tourists in the sample, showed trivial variation. Thus, all the respondents considered the tourism amenities such as accommodation, retail outlets etc. to be very attractive as the effect of size was within the trivial to small effect category. The educated, by means of the mean of importance scores, perceived tourism amenities better than the rest of the respondents.

Table 5.23: ANOVAs: Destination attractiveness by level of education

Factor	Age	N	Mean	Std. Dev	F	Sig.	Effect sizes		
Destination attractions	No school	9	3.93	±0.86	0.72	0.54			
	Non-degree	30	3.71	±0.45			0.03		
	Diploma/Degree	230	3.72	±0.43			0.01	0.00	
	Post-graduate	181	3.75	±0.47			0.02	0.01	0.00
	Total	450	3.74	±0.46					
General amenities	No school	9	3.59	±0.30	0.283	0.84			
	Non-degree	30	3.53	±0.46			0.03		

		N	Mean	SD	F	Sig			
	Diploma/Degree	230	3.56	±0.47			0.01	0.00	
	Post-graduate	181	3.59	±0.41			0.02	0.01	0.00
	Total	450	3.57	±0.45					
Tourism amenities	No school	9	3.60	±0.45	2.578	0.05			
	Non-degree	30	3.63	±0.34			0.03		
	Diploma/Degree	230	3.78	±0.44			0.01	0.00	
	Post-graduate	181	3.68	±0.46			0.02	0.01	0.00
	Total	450	3.73	±0.44					
External access	No school	9	3.63	±0.77	5.458	0.00			
	Non-degree	30	2.72	±1.10			0.03		
	Diploma/Degree	230	2.51	±0.83			0.01	0.00	
	Post-graduate	181	2.64	±0.87			0.02	0.01	0.00
	Total	450	2.60	±0.88					
Internal access	No school	9	3.54	±0.28	1.087	0.35			
	Non-degree	30	3.31	±0.38			0.03		
	Diploma/Degree	230	3.38	±0.58			0.01	0.00	
	Post-graduate	181	3.45	±0.47			0.02	0.01	0.00
	Total	450	3.41	±0.52					
Destination ambiance	No school	9	4.29	±0.41	2.648	0.04			
	Non-degree	30	3.80	±0.58			0.03		
	Diploma/Degree	230	3.93	±0.45			0.01	0	
	Post-graduate	181	3.94	±0.45			0.02	0.01	0
	Total	450	3.93	±0.46					
Destination environment	No school	9	3.94	±0.57	2.718	0.04			
	Non-degree	30	3.56	±0.48			0.03		
	Diploma/Degree	230	3.51	±0.46			0.01	0	
	Post-graduate	181	3.55	±0.45			0.02	0.01	0
	Total	450	3.54	±0.46					
Price attractiveness	No school	9	2.13	±0.22	0.842	0.47			
	Non-degree	30	2.41	±0.74			0.03		
	Diploma/Degree	230	2.44	±0.69			0.01	0.00	
	Post-graduate	181	2.49	±0.72			0.02	0.01	0

		N	Mean	SD	F	p			
	Total	450	2.45	±0.70					
Destination brand positioning	No school	9	3.82	±0.52	0.743	0.53			
	Non-degree	30	3.54	±0.45			0.03		
	Diploma/Degree	230	3.62	±0.51			0.01	0	
	Post-graduate	181	3.61	±0.50			0.02	0.01	0
	Total	450	3.61	±0.50					
Destination brand identity	No school	9	3.61	±0.40	0.851	0.47			
	Non-degree	30	3.36	±0.43			0.03		
	Diploma/Degree	230	3.45	±0.45			0.01	0.00	
	Post-graduate	181	3.46	±0.43			0.02	0.01	0
	Total	450	3.45	±0.44					
Destination brand image	No school	9	4.22	±0.46	2.336	0.07			
	Non-degree	30	3.53	±0.90			0.03		
	Diploma/Degree	230	3.65	±0.69			0.01	0	
	Post-graduate	181	3.72	±0.76			0.02	0.01	0
	Total	450	3.68	±0.73					
Destination brand loyalty	No school	9	4.72	±0.44	1.2	0.31			
	Non-degree	30	4.48	±0.62			0.03		
	Diploma/Degree	230	4.37	±0.67			0.01	0	
	Post-graduate	181	4.43	±0.66			0.02	0.01	0
	Total	450	4.41	±0.66					

Statistically significant difference: p≤0.05 (Sullivan & Feinn, 2012:281); Effect sizes key: *d=0.1: trivial effect; ** d=0.1-0.3 small effect; *** d=0.3-0.5: moderate effect; ****d>0.5 large effect

Another destination attractiveness factor that was found to have a statistical significant difference when compared with the level of education was external access ($p = 0.00$). The effect of sizes between the respondents based on their level of education was trivial, suggesting that they generally rated the external access of Zimbabwe the same. However, based on the mean of importance scores, it is important to acknowledge that the tourists who indicated that they had no schooling ($\bar{x} = 3.63$; SD = ±0.77) showed positive perceptions with regard to the external access of Zimbabwe when compared with those with post-graduate tourists ($\bar{x} = 2.64$; SD=±0.87) and diploma/degree ($\bar{x}$=2.51; SD=±0.83). It is important to note that external access is very

important for a destination to be considered attractive by tourists. However, internal access did not test statistically significant and this could be attributed to the fact that Zimbabwe "enjoys" a high police presence on the road, which deters motoring tourists. This also affects the length of stay and if it continues, Zimbabwe will become unattractive particularly to motoring tourists.

Destination's ambiance was found to be statistically significant when the comparison was made based on the respondents' level of education ($p = 0.04$), though with trivial effect sizes. Those with no schooling ($\bar{x}$ = 4.29; SD = ±0.41), and post-graduate tourists ($\bar{x}$ = 3.94; SD = ±0.45), both indicated positive perception of Zimbabwe's ambiance as a tourism destination. It was also found earlier that continent of residence of respondents resulted in different perceptions with regard to the attractiveness of Zimbabwe's destination ambience (c.f. Table 5.21). As a result, efforts must be directed at upgrading Zimbabwean tourism elements that influence destination ambience. The elements that create a truly Zimbabwean "servicescape" must be developed as a way of improving Zimbabwe's attractiveness. Destination ambience can, therefore, be used as brand Zimbabwe's unique selling point as a tourism destination.

Empirical results exhibited in Table 5.23 above show that destination environment is considered to be attractive in the context of Zimbabwe ($p = 0.04$). The effect of sizes for all the factors that tested statistically significant were all trivial. Those who had no schooling ($\bar{x}$= 3.94; SD = ±0.57), perceived Zimbabwe's destination environment as more attractive. These results imply that Zimbabwe can actually strengthen its product appeal by adding destination ambiance and destination environment. This will also help deal with the seasonality problem that the destination faces (see Chapter 6).

e. Comparison of destination attractiveness by frequency of visits

The attractiveness of Zimbabwe was also assessed by incorporating travel behaviour aspects, such as the frequency of visits, length of stay and the travel group size. Empirical results when compared by frequency of the visits tourists have made to Zimbabwe show that five destination attractiveness factors were statistically

significant. The destination attractiveness factors that had statistical significant differences are:

- Tourism amenities ($p = 0.04$);
- External access ($p = 0.00$);
- Internal access ($p = 0.03$);
- Destination environment ($p = 0.01$);
- Destination brand positioning ($p = 0.05$); and
- Destination brand image ($p = 0.01$).

Tourism amenities were found to have statistical significant differences when compared with respondents' frequency of visits to Zimbabwe as a tourism destination ($p=0.04$). There is a direct relationship that exists between the attractiveness of a destination and the frequency of visits by tourists (Lee *et al.,* 2009). Moreso, findings of Kresic and Prebežac (2011:508), identified accommodation and catering facilities as an important influence of destination attractiveness. However, there is a trivial effect in terms of the extent of these differences. Those who have visited Zimbabwe more than 5 times ($\bar{x} = 4.05$; SD = ±0.44) have a better perception of the tourism amenities in the country. This was followed by those who have visited Zimbabwe between 2 to 3 times ($\bar{x}= 3.76$; SD = ±0.46). Thus, brand Zimbabwe will be able to enhance its destination attractiveness level through the provision of quality accommodation, restaurants, recreation facilities and lodging opportunities and so on.

Table 5.24: ANOVAS: Destination attractiveness by frequency of visits

Factor	Frequency of visits	N	Mean	Std. Dev	F	Sig.	Effect sizes		
Attractions	1st time	328	3.74	±0.47	0.594	0.62			
	2-3 times	98	3.72	±0.42			0.00		
	4-5 times	12	3.83	±0.18			0.01	0.01	
	> 5 times	12	3.88	±0.69			0.01	0.02	0.08
	Total	450	3.74	±0.46					
General amenities	1st time	328	3.54	±0.47	2.471	0.06			
	2-3 times	98	3.65	±0.35			0.00		
	4-5 times	12	3.69	±0.26			0.01	0.01	

Factor	Visits	N	Mean	SD	F	p			
	> 5 times	12	3.72	±0.51			0.01	0.02	0.08
	Total	450	3.57	±0.45					
Tourism amenities	1st time	328	3.71	±0.44	2.741	0.04			
	2-3 times	98	3.76	±0.46			0.00		
	4-5 times	12	3.65	±0.32			0.01	0.01	
	> 5 times	12	4.05	±0.44			0.01	0.02	0.08
	Total	450	3.73	±0.44					
External access	1st time	328	2.46	±0.78	13.58	0.00			
	2-3 times	98	2.92	±0.97			0.00		
	4-5 times	12	2.95	±1.15			0.01	0.01	
	> 5 times	12	3.54	±1.04			0.01	0.02	0.08
	Total	450	2.60	±0.88					
Internal access	1st time	328	3.36	±0.56	3.088	0.03			
	2-3 times	98	3.50	±0.41			0.00		
	4-5 times	12	3.68	±0.22			0.01	0.01	
	> 5 times	12	3.54	±0.46			0.01	0.02	0.08
	Total	450	3.41	±0.52					
Destination Ambiance	1st time	328	3.9	±0.47	1.8	0.15			
	2-3 times	98	3.99	±0.43			0.00		
	4-5 times	12	4.12	±0.43			0.01	0.01	
	> 5 times	12	3.98	±0.54			0.01	0.02	0.08
	Total	450	3.93	±0.46					
Destination Environment	1st time	328	3.50	±0.44	4.307	**0.01**			
	2-3 times	98	3.59	±0.48			0.00		
	4-5 times	12	3.65	±0.56			0.01	0.01	
	> 5 times	12	3.92	±0.43			0.01	0.02	0.08
	Total	450	3.54	±0.46					
Price attractiveness	1st time	328	2.49	±0.73	1.52	0.21			
	2-3 times	98	2.32	±0.64			0.00		
	4-5 times	12	2.4	±0.28			0.01	0.01	
	> 5 times	12	2.48	±0.50			0.01	0.02	0.08
	Total	450	2.45	±0.70					

Destination brand positioning	1st time	328	3.59	±0.50	2.65	**0.05**			
	2-3 times	98	3.61	±0.52			0		
	4-5 times	12	3.87	±0.34			0.01	0.01	
	> 5 times	12	3.92	±0.46			0.01	0.02	0.08
	Total	450	3.61	±0.50					
Destination brand identity	1st time	328	3.43	±0.45	1.849	0.14			
	2-3 times	98	3.48	±0.43			0		
	4-5 times	12	3.5	±0.34			0.01	0.01	
	> 5 times	12	3.71	±0.38			0.01	0.02	0.08
	Total	450	3.45	±0.44					
Destination brand image	1st time	328	3.62	±0.75	3.831	**0.01**			
	2-3 times	98	3.81	±0.66			0		
	4-5 times	12	4.02	±0.69			0.01	0.01	
	> 5 times	12	4.06	±0.74			0.01	0.02	0.08
	Total	450	3.68	±0.73					
Destination brand loyalty	1st time	328	4.36	±0.68	1.956	0.12			
	2-3 times	98	4.51	±0.57			0		
	4-5 times	12	4.54	±0.58			0.01	0.01	
	> 5 times	12	4.63	±0.71			0.01	0.02	0.08
	Total	450	4.41	±0.66					

Statistically significant difference: p≤0.05 (Sullivan & Feinn, 2012:281); *Effect sizes key: *d=0.1: trivial effect; ** d=0.1-0.3 small effect; *** d=0.3-0.5: moderate effect; ****d>0.5 large effect*

External access ($p = 0.00$) tested significantly, though with trivial effect sizes. Those who have visited Zimbabwe more than 5 times ($\bar{x}$ = 3.54; SD = ±1.04) rated the external access of Zimbabwe higher than first-timers ($\bar{x}$= 2.46; SD = ±0.44) and those visiting for the second time ($\bar{x}$ = 2.92; SD = ±0.97). This could be attributable to the fact that the more one visits a destination, the more knowledgeable one is about which routes to take. Internal access ($p = 0.03$) also showed statistical significant differences when compared with the respondents' frequency of visits to Zimbabwe. The tourists who visited 4-5 times ($\bar{x}$ =3.68; SD = ±0.22) perceived the internal access of Zimbabwe better than first time ($\bar{x}$ = 3.36; SD = ±0.56) tourists did. This could be attributable to the fact that first time visiting tourists had never experienced a destination that has

police roadblocks every 10 kilometres, which generally compromises perceptions with regard to internal access. Empirical results in Table 5.24 also show that the effect of sizes of these differences have a trivial effect. Accessibility is a key destination attractiveness aspect (Lee, 2015) and Zimbabwe must ensure that tourists enjoy a relative ease of reaching the destination. This can be achieved by means of having direct flights to source markets or lure direct flights from source markets. In promoting internal access, the roadblocks that define Zimbabwe's highways must therefore be reduced.

Destination environment had a *p*-value of 0.01 when compared to the frequency of visits. Frequent visitors had a better perception of the attractiveness of Zimbabwe's environment than first-time visitors. Destination environment was also found to be statistically significant when it was compared with the level of education of tourists. This signifies that taking care of destination environment is crucial in enhancing destination attractiveness of Zimbabwe. This finding is consistent with the views of Mihalic (2000, 2013) and Vengesayi (2003). Thus, respondents generally perceive Zimbabwe's destination environment as attractive. The implication of this finding is that Zimbabwe is considered to be a safe destination for tourists. Additionally, it implies that Zimbabwe is sustainably taking care of its environment to the satisfaction of tourists.

The brand positioning of Zimbabwe had a *p*-value of 0.05, suggesting that ***Zimbabwe: A world of wonders*** is considered an attractive destination brand positioning based on the frequency of visits made by the respondents. Those who have visited more than five times ($\bar{x}$ = 3.92; SD = ±0.46) perceive the positioning of brand Zimbabwe as a tourism destination better than non-frequent visitors. This could be attributable to the fact that brand Zimbabwe as a tourism destination is home to one of the world's wonders: the Victoria Falls, and, therefore, brand positioning becomes easier when using well-known land-marks and icons. However, there were trivial effects in terms of the differences observed in this regard.

Destination brand image had a *p*-value of 0.01, suggesting that when compared with the frequency of visits, destination brand image had statistical significant differences, though the effect of sizes between the respondents was found to have a trivial effect.

However, using the means scores, tourists who visited Zimbabwe more than 5 times ($\bar{x}$ = 4.06; SD = ±0.74) showed better appreciation of the destination's brand image. This was followed by those who visited the destination between 4 and 5 times ($\bar{x}$ = 4.02; SD = ±0.69). It is clear that, the more tourists visits a tourism destination the better the perceptions they have with regard to the destination's brand image. . These findings are consistent with Prayag (2010) who argues that the destination's brand image is a key element in influencing destination choice. Empirical results discussed earlier under descriptive analysis showed that 72.9% of the respondents who participated in this survey were visiting Zimbabwe for the first time. This could be attributable to the fact that most of the visitors to Zimbabwe heard about the destination from WOM messages, hence. Zimbabwe's brand image is positive, as the destination is able to attract new visitors. It can also imply that the destination branding efforts are paying off in a positive way.

f. Comparison of destination attractiveness by travel group size

Statistical significant differences were observed between destination attractiveness factors and travel group size. The factors that had a *p*-value of less than 0.05 were attractions, general amenities, destination ambience, destination brand positioning, and destination brand image and destination brand loyalty**.**

Table 5.25: ANOVAs: Destination attractiveness comparison by travel group size

		N	Mean	Std. Dev	F	Sig.	Effect sizes			
Destination attractions	1-5 people	344	3.72	±0.44	3.354	0.01				
	6-10 people	36	3.92	±0.40			0.46			
	11-15 people	32	3.61	±0.63			0.17	0.49		
	16-20 people	26	3.78	±0.37			0.13	0.36	0.26	
	> 20 people	12	4.01	±0.59			0.49	0.15	0.62	0.39
	Total	450	3.74	±0.46						
General amenities	1-5 people	344	3.56	±0.45	2.501	0.04				
	6-10 people	36	3.62	±0.38			0.13			
	11-15 people	32	3.42	±0.47			0.3	0.42		

		N	Mean	±SD	F	p				
	16-20 people	26	3.69	±0.38			0.29	0.19	0.57	
	> 20 people	12	3.82	±0.55			0.48	0.38	0.74	0.25
	Total	450	3.57	±0.45						
Tourism amenities	1-5 people	344	3.72	±0.43	0.579	0.68				
	6-10 people	36	3.77	±0.44			0.11			
	11-15 people	32	3.71	±0.52			0.01	0.1		
	16-20 people	26	3.71	±0.35			0.03	0.13	0.01	
	> 20 people	12	3.90	±0.70			0.26	0.19	0.27	0.27
	Total	450	3.73	±0.44						
External access	1-5 people	344	2.63	±0.87	1.027	0.39				
	6-10 people	36	2.60	±1.11			0.03			
	11-15 people	32	2.32	±0.83			0.36	0.25		
	16-20 people	26	2.49	±0.77			0.16	0.1	0.21	
	> 20 people	12	2.65	±0.79			0.03	0.05	0.4	0.2
	Total	450	2.60	±0.88						
Internal access	1-5 people	344	3.39	0.54	0.765	0.55				
	6-10 people	36	3.48	±0.50			0.17			
	11-15 people	32	3.40	±0.49			0.02	0.16		
	16-20 people	26	3.53	±0.35			0.27	0.11	0.28	
	> 20 people	12	3.49	±0.50			0.19	0.02	0.18	0.09
	Total	450	3.41	±0.52						
Destination ambiance	1-5 people	344	3.95	±0.43	2.648	0.03				
	6-10 people	36	3.99	±0.53			0.09			
	11-15 people	32	3.68	±0.50			0.53	0.59		
	16-20 people	26	3.92	±0.51			0.04	0.13	0.47	
	> 20 people	12	3.90	±0.69			0.07	0.14	0.32	0.03
	Total	450	3.93	±0.46						
Destination environment	1-5 people	344	3.51	±0.46	1.417	0.23				
	6-10 people	36	3.67	±0.54			0.3			
	11-15 people	32	3.63	±0.35			0.25	0.09		
	16-20 people	26	3.57	±0.39			0.14	0.18	0.14	
	> 20 people	12	3.56	±0.63			0.08	0.18	0.1	0.02
	Total	450	3.54	±0.46						

Factor	Group	N	Mean	SD	F	p	d1	d2	d3	d4
Price	1-5 people	344	2.43	±0.70	1.311	0.26				
	6-10 people	36	2.38	±0.56			0.08			
	11-15 people	32	2.47	±0.66			0.06	0.14		
	16-20 people	26	2.65	±0.77			0.28	0.35	0.23	
	> 20 people	12	2.77	±0.93			0.36	0.42	0.32	0.13
	Total	450	2.45	±0.70						
Destination brand positioning	1-5 people	344	3.60	±0.50	2.835	0.02				
	6-10 people	36	3.76	±0.44			0.33			
	11-15 people	32	3.46	±0.53			0.27	0.58		
	16-20 people	26	3.72	±0.44			0.24	0.1	0.49	
	> 20 people	12	3.88	±0.62			0.47	0.2	0.69	0.27
	Total	450	3.61	±0.50						
Destination brand identity	1-5 people	344	3.43	±0.44	1.657	0.16				
	6-10 people	36	3.57	±0.42			0.32			
	11-15 people	32	3.41	±0.41			0.03	0.37		
	16-20 people	26	3.55	±0.40			0.27	0.05	0.32	
	> 20 people	12	3.60	±0.55			0.32	0.06	0.35	0.1
	Total	450	3.45	±0.44						
Destination brand image	1-5 people	344	3.71	±0.70	5.700	**0.00**				
	6-10 people	36	3.88	±0.72			0.22			
	11-15 people	32	3.14	±0.84			0.69	0.88		
	16-20 people	26	3.58	±0.86			0.16	0.35	0.51	
	> 20 people	12	3.88	±0.69			0.23	0	0.88	0.35
	Total	450	3.68	±0.73						
Destination brand loyalty	1-5 people	344	4.42	±0.65	3.007	**0.02**				
	6-10 people	36	4.60	±0.53			0.27			
	11-15 people	32	4.33	±0.74			0.13	0.37		
	16-20 people	26	4.25	±0.64			0.26	0.55	0.11	
	> 20 people	12	3.92	±0.73			0.69	0.93	0.56	0.45
	Total	450	4.41	±0.66						

Statistically significant difference: p≤0.05 (Sullivan & Feinn, 2012:281); *Effect sizes key: *d=0.1: trivial effect; ** d=0.1-0.3 small effect; *** d=0.3-0.5: moderate effect; ****d>0.5 large effect*

Attractions is one of the destination attractiveness factors that had statistical significant differences when it was compared using the travel group sizes that the respondents were part of during their visit to Zimbabwe (*p = 0.01*). The destination's tourism attractions as the main influence of attractiveness (Ritchie & Crouch, 2005; Leask, 2010; Reitsamer & Brunner-Sperdin, 2017; Reitsamer *et al.*, 2016) and the empirical results in Table 5.25 confirms that in the context of Zimbabwean tourism. Zimbabwe is, therefore, attractive because of its attractions especially to group travellers. Table 5.26 shows that:

- Those who were travelling in a group of >20 people ($\bar{x}$ = 4.01; SD =±0.59) rated Zimbabwe's tourism attractions higher than other groups with an effect size of *d* = 0.39 (moderate effect).
- Respondents who were travelling in a group of 6-10 people ($\bar{x}$ = 3.92; SD = ±0.40) rated Zimbabwe's attractions such as the Victoria Falls, Great Zimbabwe ruins etc. more attractive than those who were travelling in group of 11-15 people ($\bar{x}$ = 3.61; SD = ±0.63), with a moderate effect size of *d = 0.49*;
- Those who were travelling in a group of 16 -20 ($\bar{x}$ = 3.78; SD = ±0.37) rated Zimbabwe's attractions more attractive than those who were in a group of 11-15 people ($\bar{x}$ = 3.61; SD = ±0.63) people, with a small effect size of *d = 0.26*;

Therefore, based on the analysis of empirical results, tourists travelling in groups bigger than 1-5 people appreciate the natural, cultural and built attractions in Zimbabwe. The bigger the group, the more appreciation they have with regard to what Zimbabwe offers. Therefore, Zimbabwe must focus on attracting group travellers, although this approach brings many challenges to the carrying capacities of the popular attractions like Victoria Falls.

Another destination attractiveness factor that tested statistically significant was general destination amenities (c.f. Table 5.25). This implies that brand Zimbabwe as a tourism destination has good amenities making the destination attractive to group tourists. These amenities include hotel accommodation, lodging opportunities, restaurants, and recreational facilities among others. The effect sizes between respondents from different travel group sizes are as follows:

- Respondents that were drawn from a travel group of more than 20 people ($\bar{x}$=3.82; SD=±0.55) rated Zimbabwe's general amenities as more attractive than those who were travelling in a group size of 1-5 people ($\bar{x}$ = 3.56; SD=±0.45), with a moderate effect size of $d = 0.48$;

- Respondents that were in a travel group of more than 20 people ($\bar{x}$=3.82; SD=±0.55) rated the destination's general amenities as more attractive as compared to those whose travel group size were group of 11-15 people ($\bar{x}$ = 3.42; SD = ±0.47), with a large effect size of $d = 0.74$;

- 16 -20 people ($\bar{x}$ = 3.69; SD = ±0.38) also rated Zimbabwe's general amenities as a tourism destination more attractive than those who were travelling in a group of 11 -15 people ($\bar{x}$ =3.42; SD=±0.47), with an effect size of $d = 0.57$.

The variations with regard to the sample's travel group size show that the smaller groups appreciated the general amenities such as communication facilities, sports facilities and retail outlets, as compared to bigger groups. Therefore, there is need for Zimbabwe to ensure that the general amenities are enhanced to increase the satisfaction of visitors.

The destination's ambience had a *p*-value of 0.03. This implies that Zimbabwe's destination ambience is one of the product appeals that strengthen the uniqueness of the destination. Destination marketing and branding must, therefore, stress this element in the marketing messages. The study found that the effect sizes between different travel group sizes are as follows:

- Respondents that were drawn from travel group sizes of 6 -10 ($\bar{x}$ = 3.99; SD = ±0.53), people rated the destination's ambience as more attractive than those who were travelling in a group of 16-20 people ($\bar{x}$ = 3.92; SD = ±0.51), with a small effect size of $d = 0.13$;

- Large effect sizes were noticed between 1 - 5 people ($\bar{x}$ = 3.95; SD = ±0.43) when compared with 11 - 15 people ($\bar{x}$ = 3.68; SD = ±0.50) with a large effect of *d=0.53); 6 -10 people ($\bar{x}$ = 3.99; SD = ±0.53) when compared with 11-15 people ($\bar{x}$ = 3.68; SD = ±0.50) with large effect of *d=0.59).* The trend is that larger groups appreciate ambience more than smaller groups.Respondents in a travel a group that had more than 20 people ($\bar{x}$ = 3.90; SD = ±0.60)

appreciated Zimbabwe's ambience more than respondents who were in group size of 11 -15 people ($\bar{x}$=3.68; SD=±0.50) , with a moderate effect of d=0.47;

The destination's ambiance is a critical factor influencing destination attractiveness in the Zimbabwean context as it has tested significantly when compared with a number of variables such as frequency of visits, continent of residence, level of education and travel group size. Travel group sizes that are bigger appreciate the vibrancy of Zimbabwe as a destination more than those travelling in smaller travel group sizes. Bigger groups appreciate the true African experience that Zimbabwe sells compared to smaller groups. As indicated earlier, more development in Zimbabwe must focus on elements that enhance the destination's ambiance. This will help Zimbabwe enhance its tourism unique selling points.

The destination's brand positioning, **Zimbabwe: A World of Wonders**, was another destination attractiveness factor that had statistical significant differences when the comparison was done between travel group sizes (*p=0.02)*. As previously explained, Zimbabwe's destination brand positioning helps destination marketers sell Zimbabwe as an attractive tourism destination. The effect of sizes between the sizes of travel groups in relation to the attractiveness of Zimbabwe's destination brand positioning are as follows:

- Respondents who were travelling in a group of 1-5 people ($\bar{x}$ = 3.60; SD = ±0.50) evaluated the destination's brand positioning as more attractive than those who were travelling in a group of 11-15 people ($\bar{x}$ = 3.46; SD = ±0.53), with an effect size of *d=0.27*.
- Respondents in a travel group size of 16 - 20 people ($\bar{x}$ = 3.72; SD = ±0.44), when compared with respondents in a group of 1 - 5 people ($\bar{x}$ = 3.60; SD = ±0.50),said the proposition of brand Zimbabwe through **Zimbabwe: A world of Wonders** captured their interests better than smaller groups with a small effect size of *d=0.24*;
- Respondents who were travelling in a group that had more than 20 people ($\bar{x}$ = 3.88; SD = ±0.62), rated the destination's brand positioning more attractive than those who were travelling in a group of 1-5 people ($\bar{x}$ = 3.60; SD = ±0.50), with a moderate effect size of *d=0.47*.

- A moderate effect size ($d = 0.49$) was also found when comparisons were done between the 16 – 20 travel group size ($\bar{x}$ = 3.72; SD = ±0.44) and respondents that were travelling in a group size of 11 -15 people ($\bar{x}$ = 3.46; SD = ±0.53).

- Respondents who were travelling in a group size of 6-10 ($\bar{x}$ = 3.76; SD = ±0.44) people rated the destination's brand positioning as more attractive than those who were in a travel group size of 11-15 people ($\bar{x}$ = 3.46; SD = ±0.53), with a large effect size of $d=0.58$;

- Respondents who were travelling in a group of more than 20 people ($\bar{x}$ = 3.88; SD = ±0.62) perceived the destination's brand positioning as more attractive than those who were travelling in a group of 11-15 ($\bar{x}$ = 3.46; SD = ±0.53) with a large effect size of $d = 0.69$ (c.f. Table 5.25).

Zimbabwe's destination brand image was also another destination attractiveness factor that had statistical significant differences between respondents that participated in this survey (*p=0.00*). This implies that tourists visiting Zimbabwe perceives the destination's brand image aspositive and destination marketers must nurture and sustain this positive brand image. The travel groups' effect sizes in relation to the destination brand image of Zimbabwe as a tourism destination are as follows:

- Smaller effect sizes were found between respondents with regard to their perceptions of brand Zimbabwe's destination image. Respondents that were in a travel group of 6-10 people ($\bar{x}$ = 3.88; SD = ±0.72), perceived the image of Zimbabwe as more attractive than respondents that were travelling in a group of 1-5 people ($\bar{x}$ = 3.71; SD = ±0.70) with an effect size of $d = 0.22$ (small);

- There was a similarity in terms of brand image perceptions between the travel group size of 6 – 10 and those that were above 20 ($\bar{x}$ = 3.88; SD = ±0.69);

- Respondents that were drawn from a travel group of 6-10 people ($\bar{x}$ = 3.88; SD = ±0.72) rated the brand image of Zimbabwe as a tourism destination more attractive than those who were in a travel group of 16 -20 ($\bar{x}$ = 3.58; SD = ±0.86), with a moderate effect size of $d = 0.35$. The same effect size was also observed between a travel group of above 20 ($\bar{x}$ = 3.88; SD = ±0.69) with those in a travel group size of 16 – 20 people ($\bar{x}$ = 3.58; SD = ±0.86) ($d = 0.35;$ moderate effect).

The image of Zimbabwe is better evaluated by smaller travel group sizes mainly because the main sources of information about Zimbabwe largely come from WOM messages.

In summary, the most significant destination attractiveness factors that were found to be statistically significant when compared with variables such as age, frequency of visits, continent of residence etc. were destination's ambience, destination brand image, external access, internal access, destination amenities, that is both general and tourism amenities, and destination's brand positioning. In terms of the comparisons, gender did not influence anything. The respondents' continent of residence influenced perceptions with regard to general amenities, external access, and destination ambiance and destination brand image while age managed to influence only the price attractiveness dimension.

Tourists' level of education influenced perception with regard to Zimbabwe's tourism amenities, destination environment, external access, and destination ambiance. When comparisons were made in the context of the frequency of tourists, the influences that emerged from the analysis were tourism amenities, external access, internal access, destination environment, and destination brand positioning and destination brand image. The travel group size of tourists that were sampled had an influence on the destination attractions element, destination brand image, general amenities, destination brand positioning, and destination ambiance. Overall, destination ambience was found to be critical across many comparisons, hence it is a critical element of destination attractiveness that Zimbabwe must enhance.

5.5 PREDICTORS OF DESTINATION BRAND LOYALTY

This section presents the models that explain the predictors of destination brand loyalty. The study employed the statistical technique of stepwise regression analyses for demand because it provides more accurate interpretation of the independent variable (Guerard, 2013:20). Stepwise regression is a semi-automated process of building a model by means of successively adding and/or removing variables based on the *t*-statistics of their estimated coefficients (Strickland, 2017:89). Two models were, therefore, developed based on the results of the regression analyses that were conducted in this study. Destination attractiveness factors were not included at once

in the regression model because with stepwise regression, the researcher first chooses to enter the independent variables with the largest correlations and, thereafter, choose which independent variable has the highest contribution to the existing model. Correlations, therefore, give the effect of each independent variable on the dependent variable. The next section discusses the empirical results of Model 1.

5.5.1 Destination brand loyalty Model 1

In modelling the destination brand loyalty Model 1 for this study, destination brand image, destination brand identity, destination environment, price attractiveness and destination brand positioning were entered into the regression equation to predict destination brand loyalty. Table 5.26 below shows the regression model for the first five demand factors that were loaded for stepwise regression analyses for Model 1.

In an attempt to predict the goodness-of-fit of the regression model for destination brand loyalty Model 1, the multiple correlation coefficients (r) and coefficient of determination (r^2) are computed and presented in Table 5.26. The r of independent variables is 0.510, which indicates that tourists who participated in the survey ranked Zimbabwe as an attractive destination brand with all five destination attractiveness elements. In addition to this, r^2 is 0.260, and this indicates that approximately 26% of the variation in terms of destination attractiveness was explained by the five independent variables. The dependent variable for the Model 1 regression for demand was destination brand loyalty (based on the intention to visit and the intention to recommend) while the predictors for destination brand loyalty were the destination's brand image, destination brand identity, destination environment, price and destination brand positioning.

Table 5.26 also explains the f-scores and shows whether the regression analyses were statistically significant for modelling. The f-value explains whether the regression model could have occurred by chance or not. Based on the empirical results presented in Table 5.26 above, f-value is 31.236 ($p = 0.000$) and this was considered statistically significant. Thus, at step 1 of the demand regression analyses, destination environment, price, destination brand positioning, and destination brand identity and

destination brand image, were entered into the regression equation and were significantly related to destination brand loyalty ($f = 5, 444 = 31.24, p < 0.001$). The regression model, therefore, achieved a satisfactory level of goodness-of-fit in predicting the variance of destination brand loyalty in relation to other components of destination attractiveness such as destination environment, price, destination brand positioning, and destination brand identity and destination brand image.

Table 5.26: Regression Model 1 test results

Model fit	$R^2=0.260$; R =0.510, f = 31.236; α = 0.00; df = 5 (regression), 444 (residual)				
	Unstandardised coefficients		**Standardised coefficients**		
Variable	**B**	**Std. Error**	**Beta**	**T**	**Sig.**
(Constant)	3.030	0.276		10.991	0.000
Destination environment	0.215	0.065	0.150	3.329	**0.001**
Price attractiveness	-0.070	0.043	-0.074	-1.628	0.104
Destination brand positioning	0.100	0.072	0.077	1.401	0.162
Destination brand identity	-0.272	0.081	-0.182	-3.360	**0.001**
Destination brand image	0.370	0.043	0.413	8.617	**0.000**

a. Dependent Variable: Destination brand loyalty

b. Predictors: (Constant), Destination brand image, destination brand identity, destination environment, price, destination brand positioning

c. Statistically significant at *p<0.05*

Based on the empirical results presented in Table 5.26, only destination environment ($p = 0.001; β = 0.150$), destination brand identity ($p = 0.001; β=-0.182$), and destination brand image ($p = 0.000; β = 0.413$) were found to be significant predictors towards the destination brand loyalty model. Destination brand image (β = 0.413) is more influential in predicting tourists' overall destination brand loyalty. This result implies that Zimbabwe's brand image plays an important role in terms of influencing the destination's brand loyalty. This finding is consistent with the wider tourism literature (Kim & Perdue, 2011; Kresic & Prebežac, 2011; Mayo & Jarvis, 1981; Prayag & Ryan, 2012; Prayag, 2010; Vigolo, 2015; Zhang, Fu, Cai & Lu, 2014).

Empirical results show that a unit increase in an element with destination brand image would lead to a 0.413 increase in destination brand loyalty which will eventually

contribute to the overall destination attractiveness of brand Zimbabwe as a tourism destination, with other elements remaining constant. The same applies to destination environment, where a unit increase in one element within the destination environment factor would lead to a 0.150 increase in overall destination attractiveness by means of brand loyalty with other destination attractiveness constructs remaining constant.

Destination brand identity variables revealed a negative beta value of -0.182, which implies that the destination brand identity of Zimbabwe as an independent variable is negatively correlated with the *y*-variable, in this case destination brand loyalty. Destination brand loyalty on average is likely to be reduced by an amount that is equal to the beta value of -0.182 for a unit change in destination brand identity. Therefore, destination brand identity has a significant negative regression weight and this indicates that, after accounting for destination environment and destination brand image, those respondents with higher brand identity scores are expected to have lower destination brand loyalty.

Price attractiveness did not contribute to the model on Zimbabwe's brand loyalty as a tourism destination. The prices of tourism products does not enhance loyalty to brand Zimbabwe as a tourism destination. This could be attributable to the fact that brand Zimbabwe is being viewed as an expensive tourism destination. The implication of this is that price affects the length of stay for visitors and repeat visitation to Zimbabwe. Shorter length of stay affects the contribution of the tourism industry to the GDP, as tourism revenue will decline. Additionally, it also affects employment contribution. Destination brand positioning also did not contribute towards the destination brand loyalty model for Zimbabwe. This could be attributable to the low level of repeat visitors that also stems from the fact that Zimbabwe is an expensive tourism destination. Therefore, for Zimbabwe to be a more attractive tourism destination, it needs to ensure that its pricing is competitive when compared with competition as this will result in longer length of stay and repeat visitation.

Figure 5.3 presents a summarised version of Model 1. It was constructed based on the significant predictors of destination brand loyalty that were discussed above within the context of Zimbabwe as a tourism destination. Thus, based on the regression analyses that were conducted for Model 1, it is imperative to note that when a tourism

destination is attractive, its destination brand loyalty will be high. Destination brand loyalty in this study was measured using the intention to revisit and the intention to recommend Zimbabwe as a tourism destination.
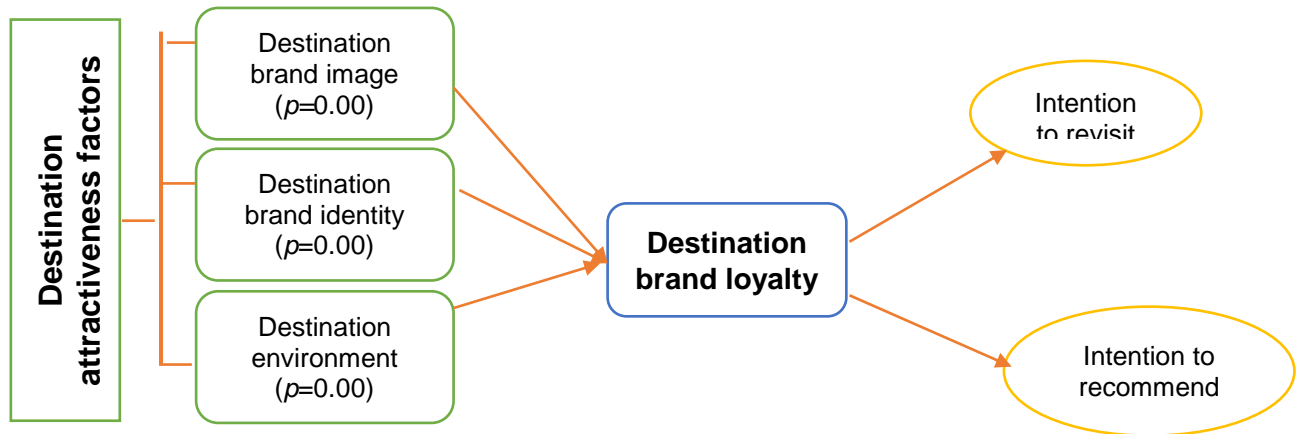
Figure 5.3: Significant predictors of destination brand loyalty in Zimbabwe
Source: Developed by author based on regression analysis (Model 1)

5.5.2 Destination brand loyalty Model 2

Model 2 of the regression analysis of demand entered into the regression equation destination ambiance, internal access, external access, attractions, tourism amenities and general amenities as predictors of destination brand loyalty. Table 5.27 below shows the predictions that were done in terms of the goodness-of-fit of the regression model for destination attractiveness. The multiple correlations ($r = 0.275$) and the coefficient of determination measured by ($r^2 = 0.076$) are examined and presented in Table 5.28. The r^2 score indicates that approximately 7.6% of the variation in terms of destination brand loyalty was explained by the six predictor variables.

The f-value explains whether the regression model could have occurred by chance. Based on the Table 5.27 above, an f-value is 6.051 ($p = 0.000$) and was, therefore, considered to be statistically significant. Thus, during step 2 of the demand regression analyses, destination ambiance, internal access, attractions, tourism amenities, external access, and general amenities, were entered into the regression equation and was significantly related to destination brand loyalty ($F = 6, 443 = 6.05, p < 0.001$). The regression model, therefore, achieved a satisfactory level of goodness-of-fit in predicting the variance of destination brand loyalty in relation with other components

of destination attractiveness such ambiance, external and internal accessibility, attractions, tourism amenities, and general amenities.

Table 5. 27: Regression Model 2 test results

Model fit	*R²=0.076; R =.275, f = 6.051; α = 0.00; df = 6 (regression), 443 (residual)*					
		Unstandardised coefficients		**Standardised coefficients**		
Variable		**B**	**Std. Error**	**Beta**	**T**	**Sig.**
(Constant)		2.542	0.401		6.341	0.000
Attractions		-0.008	0.072	-0.005	-0.105	0.916
General amenities		0.137	0.088	0.093	1.552	0.121
Tourism amenities		0.089	0.079	0.060	1.120	0.263
External access		0.072	0.040	0.096	1.800	0.073
Internal access		-0.032	0.065	-0.025	-0.483	0.629
Destination ambiance		0.253	0.074	0.178	3.400	**0.001**

a. Dependent Variable: Destination brand loyalty

b. Predictors: (Constant), Attractions, general amenities, tourism amenities, external access, internal access and destination ambience

c. Statistically significant at *p<0.05*

Based on the empirical results presented in Table 5.27, destination's ambience (*p = 0.001; β = 0.178*) is the only significant predictor for the destination brand loyalty model. This finding is consistent with the findings of Vigolo (2015:566), who argued that there is a positive relationship between a destination's ambience and destination brand loyalty. The contribution of a destination's ambience to Zimbabwe's overall destination brand loyalty is β = 0.178. Therefore, the results of the second model regression analyses showed that an increase in one element within destination ambience would lead to a 0.178 increase in destination brand loyalty and overall destination attractiveness of brand Zimbabwe as a tourism destination. However, other factors such as attractions, general amenities, tourism amenities and external and internal accessibility did not contribute to the model based on the *p*-values, but they are all considered important determinants of destination attractiveness in the wider tourism literature (Du Plessis, *et al.,* 2015; Vigolo, 2015). Zimbabwe as a tourism destination must also continue to invest in amenities and infrastructure, as these elements are crucial in enhancing destination attractiveness that will lead to loyalty.

Figure 5.4 presents a summarised version of Model 1. It was constructed based on the significant predictor of brand loyalty that was discussed above within an empirical context of brand Zimbabwe as a tourism destination.
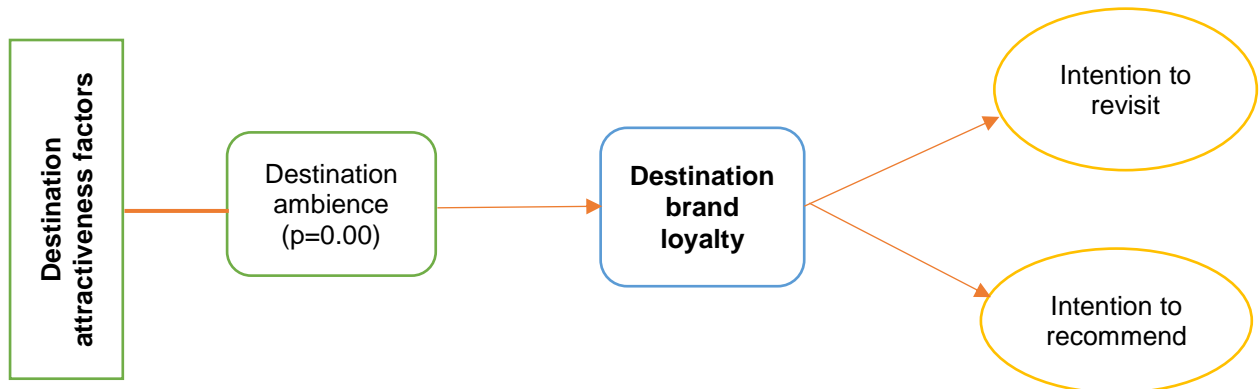
Figure 5.4: Significant predictors of destination brand loyalty in Zimbabwe
Source: Developed by author based on regression analysis Model 2

Based on the empirical results of the two steps of regression analyses that were conducted in this study, it was found that the significant contributors to destination brand loyalty include destination brand image ($p = 0.00 < 0.05$), destination ambience ($p = 0.00 < 0.05$), destination brand identity ($p = 0.00 < 0.05$), and destination environment ($p = 0.00 < 0.05$). Figure 5.5 presents the summarised version of destion brand loyalty contributors based on the regression results that were analysed in Model 1 and 2.
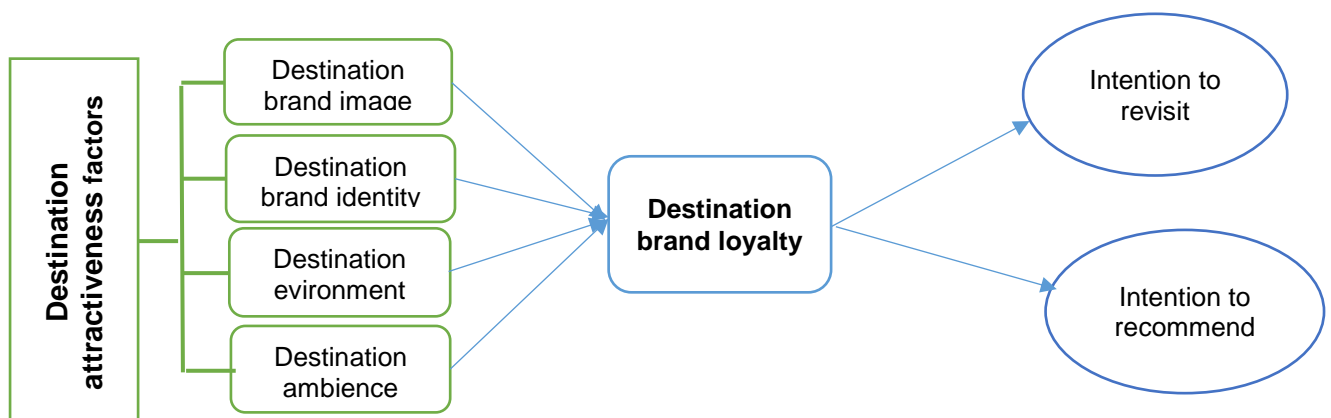
Figure 5.5: A Summary of significant destination brand loyalty in Zimbabwe
Source: Developed by author based on regression results (Model 1 and Model 2)

The relationship between destination brand loyalty and attractiveness of a tourism destination is acknowledged in research though not extensively (*see,* Vigolo, 2015:564). As a result, the identified predictors of destination brand loyalty are crucial for helping destination managers in Zimbabwe to distribute limited funds more resourcefully. Thus, tourists' plans of visiting Zimbabwe will be greatly improved. It is, therefore, imperative for the destination managers in Zimbabwe to continue to improve on these factors as a way of enhancing repeat visitation and the intention to recommend the destination.

5.6 CONCLUSIONS

This purpose of this chapter was to present the empirical demand results of the study. This was achieved in 6 major phases. The first phase dealt with an in-depth analysis of descriptive results of demand. Descriptive statistics focused on the demographic profile of respondents and their travel behaviour. There were more female respondents than male tourists. The study found that the average age of respondents was 40 years. The sample was highly educated, visiting Zimbabwe for the first time. The cost of tour packages is expensive. Sightseeing, visiting places that were never visited before and enjoyment of beautiful scenery are the key motivations of why tourists visit Zimbabwe. Zimbabwe's key attractive features include its unique attractions, safety of tourists, destination vibrancy and the hospitality of its people.

The second section of the demand analysis focused on the exploratory analyses of demand, which entered 10 groups for factor analyses. The analyses generated 12 major factors of destination attractiveness. All the factors were all significant for further analyses as indicated by several measures of reliability and validity. However, the most important factors of destination attractiveness for brand Zimbabwe are its destination ambience, attractions and tourism amenities.

The third section of demand analyses focussed on the Spearman's rank correlation among demand variables, which showed a number of positive correlations as well as a few negative correlations among variables, thereby showing that, the data was appropriate for further analysis. Large and medium significant relationships were observed among destination attractiveness factors. The destination brand identity and destination brand positioning were found to have large significant relationships.Other

significant relationships were found between, tourism amenities and general amenities as well as destination brand loyalty and destination brand image.

In addition to this, the fourth section dealt with the independent *t*-tests and there is no variation with regard to attractiveness aspects in terms of gender. The fifth section of the in-depth analysis of demand delved into the One-Way ANOVAs with Tukey's post hoc multiple comparisons. These results provided insights into the various relationships and statistical differences of the demand profile aspects as they apply to destination attractiveness. General amenities, external access, destination ambience and brand image are crucial aspects that influence the destination attractiveness of Zimbabwe based on the nationality of tourists. Price is a crucial aspect of attractiveness for tourists visiting Zimbabwe. Based on the frequency of visits made, tourism amenities, destination environment, destination branding position and destination brand image are crucial attractiveness aspects. The last section of the chapter focussed on regression analysis and destination brand loyalty modelling. It was found that destination attractiveness factors such as destination brand identity, destination ambience, destination environment and destination brand image are significant predictors of destination brand loyalty in the empirical context of brand Zimbabwe as a tourism destination.

The next chapter will discuss the results of the supply survey that was employed in assessing the competitiveness of brand Zimbabwe as a tourism destination.

EMPIRICAL RESULTS OF SUPPLY

Things get done only if the data we gather can inform and inspire those in a position to make a difference– Mike Schmoker

6.1 INTRODUCTION

The previous chapter dealt with the results that were collected from the demand side with regard to the destination attractiveness of Zimbabwe as a tourism destination. However, it is important to note that the study was approached from both the demand and supply side; therefore, the purpose of this chapter is to discuss the descriptive results and the inferential results that were gathered from the supply perspective. The supply side focused on the assessment of brand Zimbabwe's competitiveness as a tourism destination. The main objective of this chapter is to provide a detailed account of how the methodological issues outlined in Chapter 4 of this study were applied to yield the supply empirical findings as well as realising the study's objectives.

The concern of this Chapter is to clarify the empirical results that were obtained from the statistical analysis of supply data. This chapter is organised in four major sections that discuss descriptive statistics and inferential statistics. The first section presents and discusses descriptive results. Descriptive results are presented through frequencies, tables and means scores. The aspects of descriptive analysis that are presented in this chapter focused on the organisational profile aspects such as category, number of employees, operations schedules, number of years in operations, repeat business and unique selling propositions among other variables. The second section of this chapter provides an in-depth analysis and discussion on the exploratory analyses that were conducted for supply (destination competitiveness) factors. The third segment of this chapter presents and discusses the results concerning the relationships between supply factors by means of correlations and One-way Analysis of Variances. Regression analysis and modelling of destination competitiveness factors are discussed in the last section of the chapter. Figure 6.1 below presents the schematic presentation of this chapter and its components.
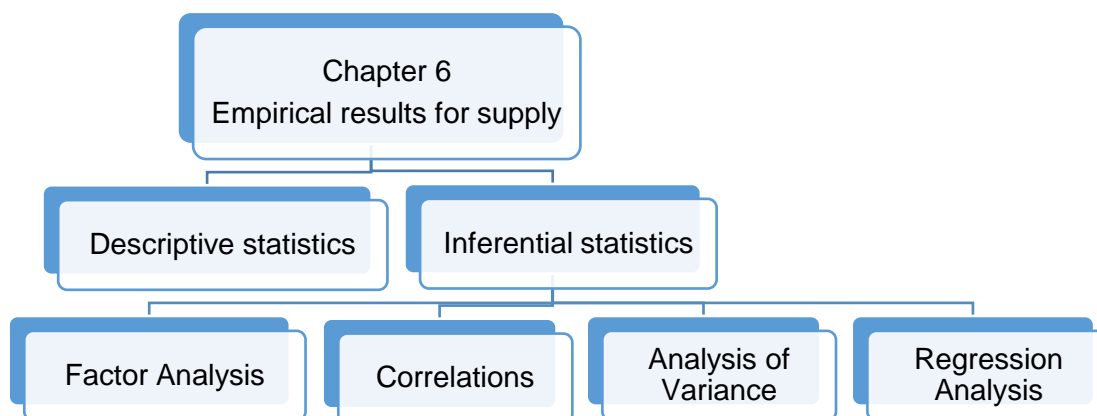
Figure 6.1: Schematic presentation of Chapter 6
Source: Developed by author

6.2 DESCRIPTIVE STATISTICS OF SUPPLY

The purpose of this section is to present the results pertaining to the descriptive statistics of the supply side survey that was conducted during the period 21 November 2016 and 17 January 2017. The descriptive statistics of supply focused on the categories of tourism and hospitality establishments, the number of years in operations, number of employees, how busy establishments are during the year, percentage of repeat business as well as the unique selling points of both Zimbabwe and the establishments that participated in this survey.

6.2.1 Business related information

This section of the descriptive statistics for supply discusses the results pertaining to business related information that was gathered during the supply survey.

6.2.1.1 Categories of tourism and hospitality establishments

Figure 6.2 below shows the operational and composition context of the Zimbabwean tourism and hospitality industry that participated in the study. Most of the respondents to the supply survey were drawn from the tourism services sector (37.9%). This was followed by the accommodation / hospitality providers (16.9%). Organisations that sell tourism attractions were 16.3% of the sample. Transport operators constituted 12% of the sample and this was the same with food and beverage providers (12%). Those

who were in the meetings, incentives, conferences and events were 5% of the sampled population (refer to Figure 6.2).
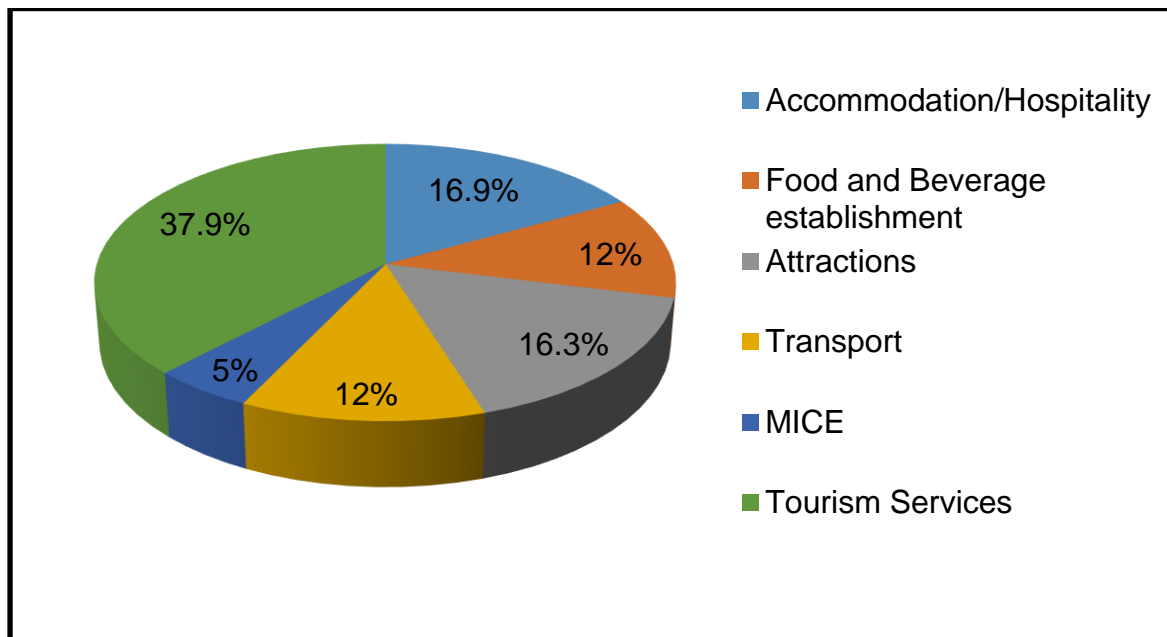
Figure 6.2: Categories of tourism and hospitality establishments

6.2.1.2 Number of years in operation

Table 6.1 below depicts the number of years establishments have been in business. The majority of the organisations have been in operation for a period that ranges between 31 years to 40 years (33%) and these are followed by the organisations that have been in business for 41 years and longer (27.9%). Those who have been in business between 11 and 20 years were 16.6% while a high number of established businesses in tourism have only operated in the last ten years (15.3%).

Table 6.1: Length of business operation

Variable	Frequency	Valid Percent
1 - 10 years	46	15.3%
11 - 20 years	50	16.6%
21 - 33 years	21	7.0%
31 - 40 years	100	33.2%
41 - 100 years	84	27.9%

6.2.1.3 Number of employees in the establishment

It is evident from the Table 6.2 that the majority of the respondents' businesses had a relatively small permanent workforce of between 31–70 employees (20.9%) showing that the destination has not yet fully recovered from the economic challenges that it experienced between 2007-2008 when inflation ran amok. This was followed by those who indicated that their permanent employees ranged between 1 – 30 employees (19.3%). Those whose businesses had relatively bigger permanent employee numbers were 6.4 % (201 – 300 employees) and 1.8% (over 300 permanent employees.

Table 6.2: Number of employees in establishment

Variable	Category	Frequency	Valid Percent
1 - 30 employees	Permanent	87	19.3%
31 - 70 employees	Permanent	94	20.9%
71 - 100 employees	Permanent	60	13.3%
101 - 200 employees	Permanent	23	5.1%
201 - 300 employees	Permanent	29	6.4%
Over 300 employees	Permanent	8	1.8%
0 - 20 employees	Temporary	234	52.0%
21 - 50 employees	Temporary	28	6.2%
51 - 100 employees	Temporary	36	8.0%
101 - 150 employees	Temporary	2	0.4%
151 - 200 employees	Temporary	1	0.2%

In relation to temporary employees, the majority of the respondents indicated that they hire between 1 to 20 employees (52.0%) and this was followed by 8.0% of the respondents who indicated that their businesses hire temporary labour of between 51 – 100 employees (and among such businesses were hotels who require more employees especially when they have large tourist groups). The results, therefore, mean that the tourism industry in Zimbabwe is generally not as labour intensive as it used to be. This could be attributable to shorter length of stay that was discussed in Chapter 5 as it has an implication on the revenue earned.

6.2.1.4 Establishments' operations schedule

Results contained in Table 6.3 below show that the tourism industry in Zimbabwe is quite seasonal, as it is busier in certain months of the year and less busy in other months of the year. The results are presented using a scale of *1 = less busy; 10 = very busy.* This information is quite critical for tourism and hospitality players in terms of devising strategies that can be used to deal with seasonality issues. The majority of respondents rated the month of January less busy (35.9%), and this tends to reflect the realities of the so-called "January disease" and "back to school commitments" of most travellers. The month of February is also considered less busy (31.6%), despite it being the month of "love". However, the tourism industry starts to be busy around the beginning of winter, with June being rated as busy with a rating of 10 by 30% of the respondents, July 39% with a rating of 10, August 51% with a rating of 10, and September 49% with a rating of 10 (c.f. Table 6.3).

Based on the empirical findings of this study, the tourism industry is relatively seasonal in nature as is the case for many other tourism destinations. It is usually busy in the following months (using the rating of 5 to 10):
- September (97.2%); and
- June (97.1%);
- July (95.5%);
- May (93.4%);
- October (92.8)
- August (90.2%);

Tourism business in Zimbabwe is at its lowest in the following months (using a rating of 1 to 4):
- January (9.6%)
- February (7.3%)
- March (33.2%).

The issue of seasonality in the wider tourism literature is well documented (*see* Amelung & Viner, 2006; Ismert & Petrick, 2004; Karamustafa & Ulama, 2010). The Zimbabwean tourism industry is influenced by seasonality. In the context of this study,

seasonality has repercussions on Zimbabwe's hotel occupancy rates between the destination's winter and summer months. These findings show that the cyclic nature of the tourism operations affects the destination's profitability and causes time-based discrepancies in terms of capacity utilisation of facilities, and human resources, hence affecting the destination's competitiveness. When the tourism industry's peak season begins in May, it implies that there will be congestion and overbooking and these aspects have the propensity to reduce the quality of service delivery if the number of tourists exceeds capacity, and in such situations, tourism business may suffer a decline in profit and this will never be recouped in the low season that starts in October. Even the employment of temporary workers will have an impact on service delivery and commitment to tourists.

Table 6.3: Establishments' operations schedule

Time	1		2		3		4		5		6		7		8		9		10	
	N	Valid %	N	Valid %	N	Valid %	N	Valid %	N	Valid %	N	Valid %	N	Valid %	N	Valid %	N	Valid %	N	Valid %
Jan	108	35.9%	92	30.6%	58	19.3%	28	9.3%	4	1.3%	5	1.7%	3	1.0%	2	5.6%	0	0%	1	0%
Feb	57	18.9%	95	31.6%	98	32.6%	29	9.6%	7	2.3%	5	1.7%	2	0.7%	4	1.3%	1	0.3%	3	1%
Mar	12	4.0%	21	7.0%	77	25.6%	92	30.6%	38	12.6%	17	5.6%	5	1.7%	34	11.3%	1	1.0%	2	1%
Apr	4	1.3%	0	0%	30	10%	21	7.0%	89	29.6%	62	20.6%	35	11.6%	34	11.3%	15	5.0%	11	4%
May	0	0%	5	1.7%	8	2.7%	8	2.7%	33	11.0%	30	10%	69	22.9%	76	25.2%	25	8.3%	47	16%
Jun	4	1.3%	0	0%	1	0.3%	5	1.7%	36	12.0%	31	10.3%	19	6.3%	68	22.6%	48	15.9%	89	30%
Jul	8	2.7%	0	0%	1	0.3%	4	1.3%	18	6.0%	38	12.6%	13	4.3%	27	9.0%	74	24.6%	118	39%
Aug	0	0%	0	0%	17	5.6%	12	4.0%	9	3.0%	4	1.3%	5	1.7%	59	19.6%	41	13.6%	154	51%
Sept	0	0%	4	1.3%	0	0%	4	1.3%	10	3.3%	19	6.3%	11	3.7%	70	23.3%	35	11.6%	148	49%
Oct	4	1.3%	0	0%	4	1.3%	14	4.7%	8	2.7%	9	3.0%	55	18.3%	85	28.2%	65	21.6%	27	19%
Nov	4	1.3%	4	1.3%	17	5.6%	32	10.6%	28	9.3%	47	15.6%	67	22.3%	58	19.3%	28	9.3%	16	5%
Dec	17	5.6%	40	13.3%	34	11.3%	53	17.6%	22	7.3%	29	9.6%	19	6.3%	18	6.0%	25	8.3%	44	15%

Scale key: 1 = least busy; 10 very busy

6.2.1.5 Repeat visitation

The results that are presented in Figure 6.3 below show that repeat visitors account for 16 to 30% of the visitors at the majority of the establishments (40.9%). This was followed by repeat visitors accounting for 31 to 45% of the visitors at 28.9% of the establishments. Twenty-four percent of the establishments indicated that their repeat customers were in the range of 5 – 15% of the visitors. Establishments that indicated a high account of repeat visitation by visitors were only 3.0%. The results imply that repeat business must be encouraged if the destination is to be competitive. The analysis of demand side data also showed that there are more first time visitors (c.f. Table 5.2). In other words, the Zimbabwean tourism industry spends more resources on marketing given that the destination has more first time visitors compared to repeat visitors.

Notes: The percentage in brackets refers to the amount of repeat visitors establishments in Zimbabwe get. The percentage outside the bracket refers to the number of establishments that get the repeat visitation in brackets.
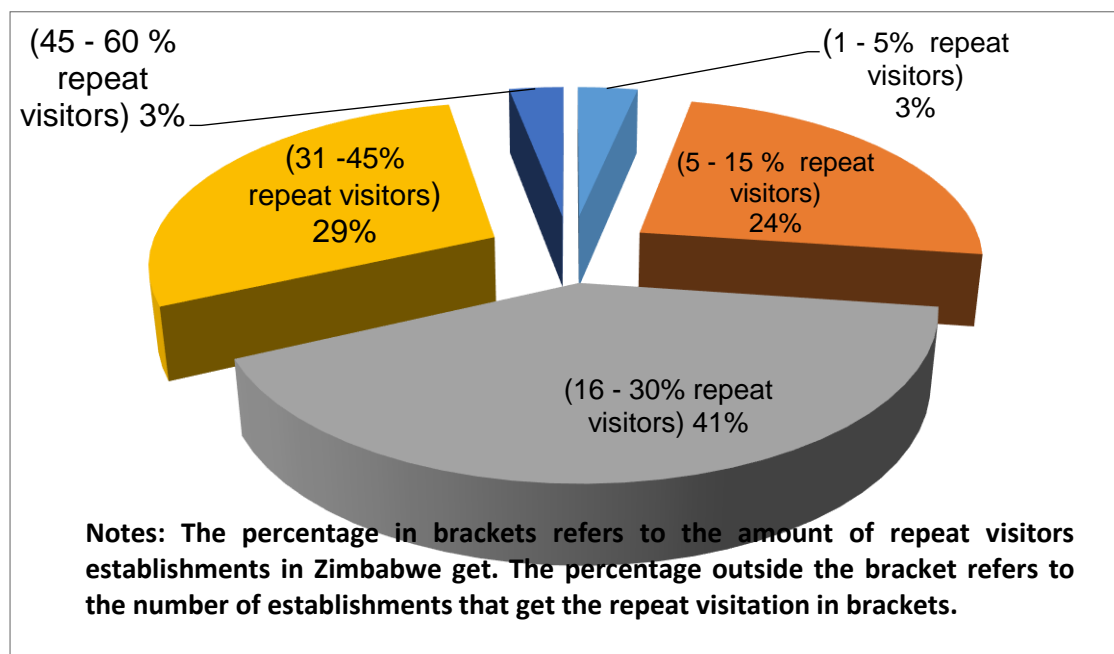
Figure 6.3: Percentage of repeat visitors per establishments

Repeat visitation is considered to play a pivotal role in destination marketing and branding as this has the potential to lower costs of destination branding (Kuusik, Tiru, Ahas & Varblane, 2011:379). This study underscores the need for Zimbabwe as a tourism destination to use the repeat visitor's percentage results in order to develop long-term relationships with its visitors.

6.2.1.6 Unique selling point of Zimbabwe

Respondents generally describe Zimbabwe's unique selling points as presented in the Table 6.4 below. The majority of the respondents indicated that Zimbabwe's unique selling proposition lies in its natural attractions such as the Victoria Falls, climate and wildlife (173 respondents). This was followed by 80 respondents who indicated that Zimbabwe has a unique selling proposition that is built around its cultural and built attractions (33 respondents), such as Great Zimbabwe, and Kariba dam etc. Therefore, it is important that Zimbabwe develop its strategic destination brand communications around the destination's unique selling points. The preferences of visitors are clear and destination marketers in Zimbabwe might need to reconsider their marketing messages to reflect these preferences.

Table 6.4: Unique selling points of Zimbabwe

Variable	Frequency
Natural attractions	*173 respondents*
Cultural attractions	*80 respondents*
Historical attractions	*16 respondents*
Built attractions	*33 respondents*
Heritages sites including UNESCO World heritages sites	*19 respondents*
Other attractions e.g. activities	*23 respondents*

6.2.1.7 Unique selling points of establishment

The following Table 6.5 indicates the unique selling points of the tourism and hospitality establishments that participated in this survey. The majority of the establishments indicated that their unique selling point was the tourism attractions/product that they offer to their clients (*86 respondents*) and this was followed by hospitality with 85 respondents who mentioned that service is actually their key strength, that makes most hospitality and tourism organisations sell globally. McCain *et al.* (2005:465) argue that, there is a positive symbiotic relationship between repeat visitation and service quality or service satisfaction. However, the finding about service as a key strength is in contradiction to the findings on repeat business, both from the demand and survey in the empirical context of Zimbabwe.

The quality of service was also noted to be a key unique selling point of establishments (52 respondents) while 27 respondents acknowledged that the tourism activities that they are involved in was their unique selling point. 14 respondents mentioned that their establishments' unique selling point was price. The finding on price implies that, given that there were few respondents who mentioned it as a unique selling point, explains that Zimbabwe is generally an expensive destination. The brand name of establishments was indicated as the least important of the unique selling points (5 respondents).

Table 6.5: Establishments' unique selling points

Key selling point	Frequency
Attractions/product	*86 respondents*
Hospitality	*85 respondents*
Service	*52 respondents*
Activities	*27 respondents*
Cuisine/Food and beverage	*26 respondents*
Location	*17 respondents*
Price	*14 respondents*
MICE	*11 respondents*
Industry pacesetters	*9 respondents*
Brand name	*5 respondents*

6.2.1.8 Marketing mediums used by establishments

Table 6.6 below shows the key marketing mediums that are currently being used by tourism establishments in Zimbabwe to market themselves to their target markets and customers.

Table 6.6: Marketing mediums used to market establishment

Media channel	Number of respondents
Facebook	*213 respondents*
Website/Internet	*155 respondents*
Exhibitions	*132 respondents*
Newsletters/Brochures	*114 respondents*
TripAdvisor	*80 respondents*

Tradeshows/roadshows	*78 respondents*
Twitter	*29 respondents*
Traditional media e.g. radio	*18 respondents*
Billboards	*9 respondents*
Word of mouth reliance	*5 respondents*
Other media e.g. independent marketers	*1 respondent*

Based on Table 6.6 above, it is evident that the majority of tourism and hospitality establishments in Zimbabwe are using social media such as Facebook, Twitter as well as consumer generated content and review sites such as TripAdvisor as a marketing medium to reach their intended customers. The results of this study are consistent with the views of Hays, Page and Buhalis (2013:211) who argue that the use of social media is actually gaining momentum as an element of destination marketing, as it offers both destination marketing organisations and tourism establishments the ability to reach global audiences at less cost. Additionally, the results of this survey regarding the use of Facebook and TripAdvisor as dominant marketing mediums in Zimbabwe are consistent with the findings of Matikiti, Kruger and Saayman (2016:7).

Facebook is a widely used platform in Zimbabwe and many tourism organisations promote their tourism products using Facebook. In their study, Matikiti *et al.* (2016:7) found that social media platforms are widely used by Zimbabwean tourism establishments. However, The Zimbabwe Tourism Authority Facebook page is not as active as compared to individual establishments' Facebook pages. Therefore, Zimbabwe Tourism must consider Facebook marketing given that younger tourists, who were found to be price inelastic, are heavy users of the platform. This will be beneficial in attracting and reaching a wider market, given that there are more than a billion people on Facebook.

In summary, it is clear that the tourism services organisations form the greater part of the tourism industry in Zimbabwe. The establishments' average years of operations in the industry are 40 years. Though the industry is expected to be labour intensive, this study found that on average, the full-time employees are 70 per establishment, while the average number of part-time employees per establishment was found to be 20. Additionally, the tourism industry in Zimbabwe was found to be seasonal and the

busiest months for the tourism industry are between May and October. The less busy months for the tourism year in Zimbabwe are between January and March.

With regard to the amount of repeat business, the study found that the average amount of repeat visitation and business was 40%. The major unique selling points for brand Zimbabwe as a tourism destination were found to be natural attractions. This was followed by cultural attractions. In terms of the establishments, the study found that the major unique selling points were the attractions/product, hospitality and service establishments sell to tourists. This was followed by the quality service the organisations provide to the customers.

6.3 DESTINATION COMPETITIVENESS DESCRIPTORS

This section of the chapter presents and discusses the synopsis of destination competitiveness descriptors.

a. Overview of brand Zimbabwe's competitiveness

Table 6.7 indicates that supply side respondents generally seemed to show that brand Zimbabwe as a tourism destination has pricing challenges, a factor that makes the destination less competitive.

Table 6.7: A summary of the supply descriptive statistics

Zimbabwe is competitive because:	Strongly disagree	Disagree	Not sure	Agree	Strongly Agree	Mean	Std Dev
it offers unique tourism products	0.0%	2.3%	2.7%	62.5%	32.6%	**4.25**	±0.62
the destination offers value for money	1.3%	0.0%	2.7%	75.7%	20.3%	**4.14**	±0.58
tourists are very satisfied	0.0%	0.0%	8.3%	71.4%	20.3%	4.12	±0.52
the attractions are of competitive quality	0.0%	1.3%	7.0%	73.8%	17.6%	4.08	±0.54
it has good tourism facilities	0.0%	4.0%	1.3%	78.7%	15.9%	4.07	±0.57
destination quality guarantees tourism satisfaction	0.0%	2.7%	4.7%	85.6%	7.0%	3.97	±0.47

Zimbabwe has world class icons	0.0%	5.3%	13.0%	64.8%	16.9%	3.93	±0.71
the return on investments in the tourism industry is very high	3.3%	9.3%	8.6%	70.1%	8.6%	3.71	±0.86
of effective human resources	8.6%	4.3%	8.3%	67.1%	11.6%	3.69	±1.03
the business environment supports tourism as an industry	3.0%	13.0%	12.0%	60.5%	11.6%	3.65	±0.95
the destination is well managed	5.0%	7.0%	21.6%	56.8%	9.6%	3.59	±0.94
the general infrastructure is among the best in Africa	3.0%	11.3%	25.9%	53.8%	6.0%	3.49	±0.88
it is cheaper than other African tourism destinations	51.5%	31.2%	14.0%	3.3%	0.0%	1.69	±0.83

A majority of respondents (96%; $\bar{x}$ = 4.14; SD = ±0.58) agree and strongly agree that Zimbabwe as a tourism destination is generally perceived to be competitive because it offers value for money. Additionally, the destination is competitive because it offers unique tourism products (95.1% respondents agree and strongly agree; $\bar{x}$ = 4.25; SD = ±0.62). Other competitive factors that were found include good tourism facilities (94.6% respondents agree and strongly; $\bar{x}$ = 4.07; SD = ±0.57), the ability to guarantee tourism satisfaction (92.6% agree and strongly; $\bar{x}$ = 3.97; SD = ±0.47); 91.7% respondents agree and strongly agree that tourists are satisfied; $\bar{x}$ = 4.12; SD = ±0.52); and competitive quality attractions were mentioned by 91.4% of the respondents under the agree and strongly agree option ($\bar{x}$ = 4.08; SD = 0.54). However, while the supply side results reveal that Zimbabwe is able to offer value for money and satisfy tourists, there is a contradiction with what the demand survey found, particularly in terms of repeat visitation.

The next section discusses the summarised version of the supply factors in individual contexts**.**

b. Level of satisfaction

Table 6.8 presents the descriptive results on the level of satisfaction as a descriptor of destination competitiveness in the empirical context of brand Zimbabwe as a tourism destination.

Table 6.8: Summary of levels of satisfaction descriptive statistics

Levels of satisfaction with tourism in Zimbabwe:	Strongly disagree	Disagree	Not sure	Agree	Strongly Agree	Mean	Std Dev
the destination brand delivers what was promised	0.0%	1.40%	0.0%	65.4%	33.2%	4.31	±0.54
the destination brand uses healthy business ethics	0.0%	0.0%	3.4%	66.4%	30.2%	4.27	±0.51
the destination brand offers value for money	1.3%	0.0%	1.3%	65.8%	31.6%	4.26	±0.62
tourists are satisfied with the attractiveness of the destination	0%	1.4%	11.6%	59.8%	27.2%	4.13	±0.65
post-visit comments about Zimbabwe are positive	1.0%	4.3%	32.2%	55.5%	7.0%	3.63	±0.72
on-line comments show high levels of satisfaction by tourists	4.0%	8.6%	36.2%	41.9%	9.3%	3.44	±0.92
the destination enjoys a positive word-of-mouth referrals	10.6%	12.4%	35.5%	34.2%	7.3%	3.15	±1.08
Zimbabwe receives a high number of return visitors	19.3%	36.20	14.6%	23.6%	6.3%	2.61	±1.22

Table 6.8 shows the perceptions of supply side respondents in terms of Zimbabwe's destination competitiveness measured by the levels of satisfaction of the visitors with the tourism products. Based on the empirical results presented above, Zimbabwe as a tourism destination is perceived to be competitive because a majority of the respondents agree and strongly agree that:

- The destination brand delivers what was promised (98.6%; $\bar{x}$ = 4.31; SD = ±0.54).
- The destination brand offers value for money (97.4%; $\bar{x}$ = 4.26; SD = ±0.62); and
- The destination brand uses healthy business ethics (96.6%; $\bar{x}$ = 4.27; SD = ±0.58)

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This means that brand Zimbabwe as a tourism destination can be trusted and this will contribute towards the brand image of the destination. The delivery of what was promised can also be leveraged in building repeat visitation.

c. Destination branding returns

Table 6.9 shows the overview of the returns that the destination is accruing from its destination branding efforts. A majority of the respondents disagree and strongly disagree that the destination branding efforts, particularly the rebranding, has not been able to stimulate the much needed visitorship to Zimbabwe (55.8%; $\bar{x}$ = 2.52; SD = ±1.04), hence affecting the overall competitiveness of the destination. This could be attributable to the lack of stakeholder cooperation that was identified in chapter 3 of the study. In addition, branding in Zimbabwe is perceived as failing, possibly because they are focusing on the wrong attractiveness factors than what the tourists want. Government expenditure towards the tourism industry was found to be not good for the tourism industry as shown in Table 6.9.

Table 6.9: Descriptive statistics of returns on destination branding investments

Returns on destination branding investment:	Strongly disagree	Disagree	Not sure	Agree	Strongly Agree	Mean	Std Dev
the rebranding of Zimbabwe, from Africa's Paradise to A World of Wonders has led to an increase in visitor numbers	13.6%	42.2%	28.6%	9.3%	6.3%	2.52	±1.04
government expenditure towards the tourism industry is good	17.3%	45.5%	24.9%	12.3%	0%	2.32	±0.90
spending by tourists from target markets is very high	2.3%	4.7%	12.6%	59.5%	20.9%	3.92	±0.85
international competitiveness rankings have moved up since rebranding in 2011	18.9%	33.9%	35.9%	11.3%	0%	2.40	±0.92
tourists trust the new brand: ***Zimbabwe: A World of Wonders***	8.3%	19.3%	51.8%	15.9%	4.7%	2.89	±0.93

the new brand led to growth in market share	13.3%	40.9%	31.2%	13.3%	1.3%	2.49	±0.93
spending made in terms of marketing Zimbabwe corresponds with visitor spending	11%	24.9%	50.2%	12.6%	1.3%	2.68	±0.88
tourists visiting the destination stay longer and spend more than before rebranding	25.6%	39.5%	23.3%	10.3%	1.3%	2.22	±0.99
events and festivals are effective for tourism growth	3.0%	4%	26.9%	38.9%	27.2%	3.83	±0.97
more and more people are employed in the tourism industry	8.0%	13.3%	33.6%	32.2%	13.0%	3.29	±1.10

Establishments in Zimbabwe agree and strongly agree that the tourists who visit Zimbabwe are able to spend more as the only positive element that the destination is enjoying from its destination branding investments (80.4%; $\bar{x}$ = 3.92; SD = ±0.85). Overall, empirical results presented in Table 6.9 show that the returns of destination branding in relation to brand Zimbabwe's competitiveness as a tourism destination are relatively very low. Therefore, it can be said that the destination branding strategy in Zimbabwe has not been effective in building the country's market share and tourist arrivals. Tourist spending is relatively low and this could be attributable to the fact that Zimbabwe is a relatively expensive tourism destination, whose loyal market is not willing to spend more (refer to Table 6.7). Additionally, the branding strategy has not been effective for Zimbabwe in ensuring that tourists stay longer. Shorter length of stay has implications for Zimbabwe's hotels occupancies and tourism revenue, for example.

d. Destination quality

Based on the analysis of the empirical results presented in Table 6.10 below, brand Zimbabwe as a tourism destination is competitive in terms of its ability to offer quality ground and airport infrastructure, as noted by the number of respondents who agree and strongly agree with this element (84.7%; $\bar{x}$ = 3.87; SD = ±0.78). In addition to this, tourist receipts are also an indication that Zimbabwe is a competitive tourism

destination, as identified by 72.4% ($\bar{x}$ = 3.75; SD = ±0.81) who agree and strongly agree with the point.

Table 6.10: Summary of destination quality descriptive statistics

Destination quality of Zimbabwe:	Strongly disagreed	Disagree	Not sure	Agree	Strongly Agree	Mean	SD
Zimbabwe offers quality ground and airport infrastructure	2%	6.3%	7%	72.4%	12.3%	3.87	±0.78
the human resources within the tourism industry are effective	4%	7.0%	18.9%	63.5%	6.6%	3.62	±0.87
tourist receipts are an indication of destination quality	1%	7.6%	18.9%	60.1%	12.3%	3.75	±0.81
destination enjoys good Wi- Fi and internet connectivity	22.6%	26.9%	19.3%	26.2%	5%	2.64	±1.23

However, empirical data presented in Table 6.10 also shows that brand Zimbabwe's destination's quality is being negatively affected by the absence of good Internet infrastructure for tourist connectivity. There are 49.5% ($\bar{x}$ = 2.64; SD = ±1.23) who disagree and strongly disagree that the destination has good Wi-Fi and Internet connectivity facilities. With many tourists interested in sharing their tourism experiences on social media platforms such as Twitter, Facebook and Instagram, this has the potential to affect repeat visitation of tourists, as they are not able to instantly share what they are experiencing. This also contributes to bad publicity through reduced positive WOM messages. This is something that Zimbabwean tourism must address since the needs of tourists are constantly changing.

The other destination competitiveness aspect that was assessed in this survey was the quality of human resources within the tourism industry. Table 6.11 shows the descriptive statistics in relation to the quality of human resources perception in brand Zimbabwe as a tourism destination. The respondents agreed and strongly agreed that destination competitiveness depends on the extent of tourism staff training (87%; $\bar{x}$ = 4.05; SD = ±0.65). Therefore, in the context of Zimbabwe, it is imperative to note that the respondents agree and strongly agree that the destination has qualified tourism

staff (70.1%; $\bar{x}$ = 3.63; SD = ±1.07). This implies that Zimbabwe is able to offer quality service to the tourists.

Table 6.11: Human resources quality descriptive statistics

Human resources quality in the tourism industry:	Strongly disagree	Disagree	Not sure	Agree	Strongly Agree	Mean	SD
quality of educational system contributes to tourism competitiveness	7.0%	10.3%	15.3%	47.5%	19.9%	3.63	±1.12
High local availability of specialised research and training in the tourism industry	5%	12.3%	23.6%	48.5%	10.6%	3.48	±1.01
destination competitiveness depends on the extent of tourism staff training	2.3%	11.6%	0%	65.4%	21.6%	4.05	±0.65
Zimbabwe has qualified tourism and hospitality staff	7.0%	9.0%	14.0%	54.2%	15.9%	3.63	±1.07
Zimbabwean tourism employers prefer to hire foreign labour	12.0%	40.2%	14.0%	54.2%	15.9%	2.66	±1.07

e. Destination attractiveness

The descriptive statistics that are presented in Table 6.12 below explains the elements of destination attractiveness that describe brand Zimbabwe's competitiveness as a tourism destination.

Table 6.12: Summary of destination attractiveness descriptive statistics

Evaluate the attractiveness of Zimbabwe:	Strongly disagree	Disagree	Not sure	Agree	Strongly Agree	Mean	Std Dev
visitors feel safe in Zimbabwe	0%	0%	1.3%	66.1%	32.6%	4.31	±0.49
unique local cuisine appeals to the international tourism market	0%	1.0%	8.0%	53.5%	37.5%	4.28	±0.65
destination is visually appealing	0%	1.0%	4.0%	62.8%	32.2%	4.26	±0.58

destination has well known destination landmarks and icons	0%	1.3%	3.3%	78.1%	17.3%	4.11	±0.50
destination's nightlife appeals to the international tourism market	2.0%	5.3%	15.6%	54.2%	22.9%	3.91	±0.88
destination's different cultures has a strong international appeal	1.0%	0%	7.0%	68.8%	23.3%	4.13	±0.61
special events and festivals like the Carnival, Harare International Festival of the Arts, etc. have strong international appeal	2.0%	6.3%	16.6%	57.5%	17.6%	3.82	±0.86
destination has interesting architecture	0%	1.3%	5.0%	78.4%	15.3%	4.08	±0.50
destination has good climate and weather	0%	0%	2.3%	75.1%	22.6%	4.20	±0.46
destination has unique history	0%	1.3%	4.3%	71.1%	23.3%	4.16	±0.55
quality museums and monuments	1.3%	4%	10%	67.1%	17.6%	3.96	±0.75

Supply side data shows that destination attractiveness aspects such as attractions, cuisine, special events and good weather were among the elements that contribute to brand Zimbabwe's competitiveness. Empirical results presented in Table 6.12 show that respondents agree and strongly agree that Zimbabwe is competitive based on:

- Perceptions of visitor safety (98.7%; $\bar{x}$ = 4.31; SD = ±0.49);
- Climate and weather (97.7%; $\bar{x}$ = 4.20; SD = ±0.46); and
- Well-known landmarks such as the Victoria Falls (95.4%; $\bar{x}$ = 4.11; SD = ±.50).

The destination marketers for Zimbabwe must, therefore, stress these elements of visitor safety, climate and weather, well-known landmarks and cultures as the unique selling points. This will help the destination to compete in a market place where there is growing competition in the Southern African region. There are, however, differences between demand and supply on the issue of destination attractiveness and destination

marketers must reduce this gap by matching what tourists look for and what the destination has to offer.

f. Destination management practices

Destination management practices were also assessed in this survey and Table 6.13 presents the descriptive results of destination management practices as a descriptor of brand Zimbabwe's competitiveness as a tourism destination. Survey data shows that only the provision of tourism information stands out to be a good destination management practice that was in the affirmative (83.1% agree and strongly agree; ($\bar{x}$ = 3.92; SD = ±0.79).

Table 6.13: Summary of destination management practices descriptive statistics

Zimbabwe's destination management practices:	Strongly disagree	Disagree	Not sure	Agree	Strongly Agree	Mean	Std Dev
there is high stakeholder accountability	10.3%	22.9%	29.6%	31.2%	6.0%	3.00	±1.09
private sector's support towards the tourism industry is good	11.3%	21.6%	27.9%	32.9%	6.3%	3.01	±1.12
the community's support towards sustainable tourism is good	3.0%	12.6%	22.6%	57.1%	4.7%	3.48	±0.88
there is effective coordination and alliances of key operators in the tourism industry	6.0%	19.3%	34.9%	38.9%	1.0%	3.10	±0.92
there is a good provision of tourism information	2.0%	4.3%	10.6%	65.8%	17.3%	3.92	±0.79
Zimbabwe Tourism Authority is effective in monitoring and evaluating the performance of the tourism industry	7.0%	24.6%	48.2%	14.6%	5.6%	2.87	±0.94
Zimbabwe Tourism Authority conducts periodic and systematic marketing and destination branding research	4.0%	30.2%	45.8%	15.9%	4.0%	2.86	±0.87
the tourism industry is innovative; always producing new products	13.0%	32.9%	35.9%	12.3%	6.0%	2.65	±1.05

	Strongly disagree	Disagree	Not sure	Agree	Strongly Agree	Mean	Std Dev
there is high level of commitment towards the development of a favourable destination image by concerned players	15.3%	26.9%	27.9%	25.2%	4.7%	2.77	±1.13

Empirical data shown in Table 6.13 also shows that a number of good destination management practices such as stakeholder accountability, periodic destination branding research and innovation were rated low in this survey. This lack of stakeholder accountability and periodic research affects destination success (Heath, 2003). Another key destination management aspect that was found to be on the low side was the ineffectiveness of the national DMO in evaluating the performance of the brand over a period of time This implies that with a lack of periodic research, Zimbabwe might not know the current needs of its visitors. This could also explain the fact that the destination receives a low number of repeat visitors. Therefore, there is need for Zimbabwean Tourism to relook into some of these destination management practices in an attempt to build a sustainable and competitive destination brand.

g. Brand strategy effectiveness

Table 6.14 presents the empirical descriptive results on the effectiveness of Zimbabwe's brand strategy.

Table 6.14: Summary of the effectiveness of destination brand management strategy descriptive statistics

Evaluation of branding efforts:	Strongly disagree	Disagree	Not sure	Agree	Strongly Agree	Mean	Std Dev
the destination management to position itself as a "*A World of Wonders*"	17.3%	44.2%	22.6%	8.3%	7.6%	2.45	±1.11
the destination is now attracting more high spending tourists after rebranding	21.3%	35.9%	28.2%	9.6%	5.0%	2.41	±1.08
rebranding of Zimbabwe improved the destination's image	12.0%	33.6%	25.6%	23.6%	5.3%	2.77	±1.10

the destination managed to attract tourism investors after rebranding	16.3%	48.8%	18.9%	13.3%	2.7%	2.37	±0.99
destination branding objectives are being met	12.3%	36.9%	43.2%	6.6%	1.0%	2.47	±0.83
tourism outputs such as arrivals, length of stay, market share, employment etc., have been rising due to rebranding	35.9%	41.9%	9.3%	12.0%	1.0%	2.00	±1.01
destination brand loyalty is on the rise as indicated by repeat visitor intentions and social media generated comments	18.3%	40.2%	22.9%	15.0%	3.7%	2.46	±1.07
destination marketing communication programmes have been successful in dealing with perception management	27.2%	41.5%	12.3%	16.6%	2.3%	2.25	±1.10
social media use at destination is effective for perception management and brand image building especially with modern tourists	12.6%	16.3%	14.6%	40.2%	16.3%	3.31	±1.28
travel trade events hosted in recent years have been effective in bringing tourism business	17.6%	44.5%	15.9%	16.9%	5.0%	2.47	±1.12
brand ambassador programmes launched since 2006 have been effective in generating tourism business	28.6%	42.2%	13.3%	9.6%	6.3%	2.23	±1.15

This study found that the brand strategy of Zimbabwe as a tourism destination has not been effective. Supply side respondents disagreed to strongly disagreed with the statement that the brand strategy Zimbabwe pursued stimulated stimulate arrivals, length of stay, and market share growth etc. (77.8%; $\overline{x}$ = ±2.00; SD = ±1.01). This could

also explains why the repeat visitation number for Zimbabwe as a tourism destination has been found to be low. The branding strategy is not effective in building loyal markets for the destination. The brand ambassador programmes that were employed by the Zimbabwe Tourism Authority in 2006 were also a failure (70.8% disagree and strongly disagree; $\overline{x}$ = 2.23 SD = ±1.15). Therefore, it means that the current and past efforts of destination marketers in dealing with perception problems were unsuccessful (68.4% disagree and strongly disagree; $\overline{x}$ = 2.25; SD = ±1.10). This failure is attributable to the fact that there is a general lack of periodic research on the part of the destination managers in Zimbabwe with regard to the performance of the brand and destination marketing programmes. Therefore, there is need for the destination to devise other forms of destination marketing practices that can help Zimbabwe to move from its negative image to one that is positive.

h. Tourism infrastructure

Tourism infrastructure is a key element of destination competitiveness (Prayag, 2010:466; Assaf & Tsionas, 2015:59; Reitsamer *et al.,* 2016). Table 6.15 provides a summary of descriptive statistics on tourism infrastructure perceptions as a descriptor of destination competitiveness in the empirical context of brand Zimbabwe as a tourism destination.

Table 6.15: Summary of tourism infrastructure descriptive statistics

Evaluate the tourism infrastructure of Zimbabwe:	Strongly disagree	Disagree	Not sure	Agree	Strongly Agree	Mean	Std Dev
restaurants meet the needs of tourists	0%	0%	2%	55.8%	42.2%	4.40	±0.53
destination has a variety of shopping facilities for souvenirs	13.3%	4.%	56.8%	34.9%	0%	4.21	±0.75
destination has enough money exchange facilities	1.3%	5.0%	15.3%	61.5%	16.9%	3.88	±0.79
destination has a variety of high quality accommodation	0%	0%	2.3%	61.5%	36.2%	4.34	±0.52
destination has efficient tour operators	0%	0%	2.3%	69.8%	27.9%	4.26	±0.49
destination has high quality entertainment facilities	9.3%	18.9%	17.6%	47.5%	6.6%	3.23	±1.12

The survey found that Zimbabwe's competitiveness is enhanced by a variety of restaurants that are able to meet the needs of tourists as noted by those who agree and strongly agree on this element of destination competitiveness (98%; $\bar{x}$ = 4.40; SD = ±0.53). This was also followed by quality accommodation (97.7% agree and strongly agree; $\bar{x}$ = 4.34; SD = ±0.52) and efficient tour operators (97.7% agree and strongly agree; $\bar{x}$ = 4.26; SD = ±0.49). However, the study found that respondents were indifferent with regard to shopping facilities for souvenirs. Therefore, there is need for proper investment into shopping facilities that cater for tourist souvenirs in Zimbabwe.

i. Price competitiveness

Based on the results that are presented in Table 6.16, Zimbabwe is a tourism destination whose pricing is doing a lot of damage to its competitiveness. It was found that the tax regime in Zimbabwe was also an element of the destination's pricing system that makes brand Zimbabwe less competitive (91%; $\bar{x}$ = 1.50; SD = ±0.83). It is this "cruel" tax regime that makes Zimbabwe's pricing expensive when compared with that of its source markets and regional competitors like South Africa, Namibia and Botswana, for example (82.7% agree and strongly agree; $\bar{x}$ = 1.83; SD = ±0.76). The overall prevailing economic conditions in Zimbabwe were also found to be affecting the issue of price competitiveness (81.7% agree and strongly agree; $\bar{x}$ = 1.97; SD = ±0.99).

Table 6.16: Summary of price competitiveness descriptive statistics

Evaluate Zimbabwe's price competitiveness:	Strongly disagree	Disagree	Not sure	Agree	Strongly Agree	Mean	Std Dev
the use of multi-currency in the economy adopted in February 2009 has positive effect on travel	10.3%	33.2%	37.2%	16.9%	2.3%	2.68	±0.95
destination's pricing is cheaper than that of the source markets	36.2%	46.5%	15.0%	2.3%	0%	1.83	±0.76
the visitors to Zimbabwe are price sensitive/elastic	5%	9.3%	47.2%	32.2%	6.3%	3.26	±0.90
the destination has favourable tax policies on tourism services (including Value Added Tax)	65.4%	25.6%	2.7%	6.3%	0%	1.50	±0.83

overall prevailing economic conditions makes Zimbabwe to be price competitive	35.2%	46.5%	5.6%	11.3%	1.3%	1.97	±0.99
destination's prices affect the long-haul market potential negatively	2.7%	4.7%	9.6%	30.2%	52.8%	4.26	±0.99

Based on the results presented in Table 6.16, Zimbabwe is an expensive tourism destination, though supply results shows that establishments perceive Zimbabwe as a destination that gives visitors value for their money. Therefore, Zimbabwe as a tourism destination does not enjoy price competitiveness, despite having multiple currencies. Due to the hostile tax regime that affects pricing in Zimbabwe, the long-haul market of brand Zimbabwe is, therefore, affected (83%; $\bar{x}$ = 4.26; SD = 0.99). This means that Zimbabwe is not competitive for long-haul markets because it is an expensive destination. This explains why Africa (32.9%) constitutes the majority of visitors to Zimbabwe more than people from Europe (29.8%), Asia (13.6%) and the Americas (21.1%) (c.f. Table 5.1). Additionally, the implication of price is that, apart from affecting tourist arrivals, it also affects the length of stay, occupancies and loyalty. These will result in multiplier implications on the contribution of the tourism industry to the GDP and employment. The need to review prices for Zimbabwe as a tourism destination is urgent if it is to compete with regional tourism destinations like Namibia, South Africa and Botswana, for example.

j. Politics and policies

Table 6.17 below shows the descriptive results of politics and policies as a descriptor of destination competitiveness.

Table 6.17: Summary of politics and policies descriptive statistics

Indicate your comment on the following moderating factors:	Strongly disagree	Disagree	Not sure	Agree	Strongly Agree	Mean	Std Dev
the destination's visa policies promotes tourism	41.2%	11.6%	3.3%	41.5%	2.3%	2.52	±1.43
the destination and its main attractions are highly accessible	6.3%	3%	6.6%	65.8%	18.3%	3.87	±0.96
destination is politically stable	1.3%	5.3%	15.6%	63.8%	18.3%	3.84	±0.78

there is political will in building a competitive and attractive destination brand	15%	36.5%	17.6%	26.9%	4.0%	2.68	±1.14
assumed level of corruption affects Zimbabwe's competitiveness	2.7%	7.3%	13.3%	25.9%	50.8%	4.15	±1.07
print and electronic media, both in and outside the destination helps in projecting a competitive and attractive destination brand	2%	15.9%	27.2%	39.2%	15.6%	3.50	±1.00

Zimbabwe, as a tourism destination, is seen as competitive because it is an accessible destination (84.1% agree and strongly agree; $\bar{x}$ = 3.87; SD = ±0.96). Accessibility perceptions might go up if Zimbabwe takes a deliberate step to reduce the heavy police presence on its highways that was cited as an inhibitive factor in the demand survey. Additionally, the ease of access and tourist arrivals will also be improved if Zimbabwe launches and attracts direct flights to and from its major source markets. Political stability is another element that was found to enhance brand Zimbabwe's competitiveness as a tourism destination.

Empirical descriptive results in Table 6.17 above, however, show that Zimbabwe is not competitive because it pursues visa policies that do not promote tourism (52.8% disagree and strongly disagree; $\bar{x}$ = 2.52; SD = ±1.43). The visas to Zimbabwe were found to be very expensive, particularly for single entry visitors. This finding is consistent with the findings of Woyo (2017) which list Zimbabwe's visa openness score low. This also explains why Zimbabwe has a lower number of repeat visitors. There is need for Zimbabwe to pursue more tourism friendly visa policies without promoting terrorism and threatening its border security.

k. Prosperity and investment competitiveness

Empirical results in Table 6.18 below describe prosperity and investment competitiveness as a descriptor of destination competitiveness in the empirical context of Zimbabwe as a tourism destination.

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Table 6.18: Summary of prosperity and investment competitiveness descriptive statistics

Zimbabwe is competitive because:	Strongly disagree	Disagree	Not sure	Agree	Strongly Agree	Mean	Std Dev
there is evidence of prosperity of destination residents	28.9%	31.9%	23.6%	14.6%	1%	2.27	±1.06
there is evidence of increased contribution towards GDP by the tourism industry	1.3%	6.3%	17.9%	64.1%	10.3%	3.76	±0.77
the destination is able to attract Foreign Direct Investment	28.9%	23.6%	20.3%	23.6%	3.7%	2.50	±1.24

Based on the empirical finding presented in Table 6.18, Zimbabwe is not economically competitive as a tourism destination despite the tourism industry being regarded as the major contributor to the country's GDP (WTTC, 2017). There is no evidence of prosperity of destination residents (60.8% disagree and strongly disagree; $\bar{x}$ = 2.27; SD = ±1.06). Additionally, the destination has not been able to attract foreign direct investment in the tourism and related sectors (52.5% disagree and strongly disagree; $\bar{x}$ = 2.50; SD = 1.24). This could be explained by policy inconsistencies that characterise the government of the Republic of Zimbabwe, particularly with its black economic empowerment laws.

In summary, it is clear from the discussion of findings in this section that the following supply factors are important in building brand Zimbabwe as a competitive destination brand as indicated by the respondents who agree and strongly agree:

- Visitor safety (98,7%; $\bar{x}$ = 4.31; SD = ±0.49)
- Destination delivers what was promised (98.6%; $\bar{x}$ = 4.31; SD = ±0.54)
- Quality accommodation (97.7%; $\bar{x}$ = 4.31; SD = ±0.52)
- Efficient tour operators (97.7%; $\bar{x}$ = 4.26; SD = ±0.49)
- Climate and weather (97%; $\bar{x}$ = 4.20; SD = ±0.46)
- Destination offers value for money (96%; $\bar{x}$ = 4.14; SD = ±0.58)
- Well known land marks and icons (95.4%; $\bar{x}$ = 4.11; SD = ±0.497)
- Destination's visual appeal (95%; $\bar{x}$ = 4.26; SD = ±0.58)

6.4 INFERENTIAL STATISTICS FOR SUPPLY

The purpose of this section is to present the results pertaining to the inferential statistics of the supply side survey that was conducted during the period 21 November 2016 to 17 January 2017. This section is divided into three major categories. The first section discusses exploratory analyses of destination competitiveness factors. The exploratory analyses were conducted using factor analysis. The second subsection presents and discusses the relationship that exists between destination competitiveness factors by means of Spearman's rank order correlations. Aspects influencing destination competitiveness of Zimbabwe as a tourism destination are discussed in the third subsection while the last sub section discusses the empirical results in terms of regression modelling.

The next section discusses the exploratory analyses of destination competitiveness factors in the context of brand Zimbabwe.

6.4.1 Exploratory analyses of destination competitiveness aspects

Factor analyses were conducted to determine the critical factors that influence the destination competitiveness of Zimbabwe as a tourism destination. Just like the exploratory analyses of demand, the purpose of supply factor analyses was for data reduction and summarisation (Malhotra *et al.,* 2013:262). The supply survey assessed a number of factors and, therefore, reduction was necessary. Factor analyses of supply were conducted using the principal component analysis with oblique rotation, which is a measure of construct validity.

The purpose of conducting factor analyses was to determine whether underlying factors might be present in the supply data before implementing further analysis and modelling. The groupings that were used in the factor analyses process to measure destination competitiveness were: level of satisfaction (Group 1*, with 8 elements*), returns on destination branding investments (Group 2*, with 10 elements*), destination quality (Group 3*, with 4 elements*), quality human resources (Group 4*, with 5 elements*), destination attractiveness (Group 5*, with 11 elements*), destination management practices (Group 6*, with 9 elements*), effectiveness of destination brand management strategy (Group 7*, with 11 elements*), tourism infrastructure (Group 8*,*

with 6 elements), price competitiveness (Group 9*, with 6 elements*), moderating factors (Group 10, *with 6 elements*), and economic competitiveness (Group 11, *with 6 elements*).

Reliability analyses for each of the 11 groups were conducted and these groupings were statistically reliable and valid as shown in subsequent sections. KMO statistics was applied to each of the 11 latent groupings and the sample is considered adequate if the value of the Kaiser Mayer-Olkin measure is greater than 0.50 (Field, 2000:445). The Bartlett's test of sphericity for each of the supply factors also reached a statistical significance that was reflected by a $p < 0.001$, thereby supporting the factorability of the correlation matrix. The factors that had eigenvalues that were greater than one were retained for further analysis and items that cross-loaded on either factor one or factor two, having a loading of more than 0.3, were classified in the factor in which the researcher felt was most appropriate based on the literature reviewed.

Group 1: Level of satisfaction elements

Level of satisfaction refers to what tourists consider to be satisfaction elements. A total of 8 observed elements were loaded into this group for factor analyses and it yielded two factors that were labelled as satisfaction recommendations and satisfying brand experiences. All the elements were retained for further analysis as they had factor loadings above 0.3.

Table 6.19: Factor analyses of level of satisfaction elements

Level of satisfaction elements	Factor loading	Cronbach Alpha	Mean	Average inter-item correlation	Variance %
Factor 1: Satisfaction recommendations factor		0.72	4.24	0.37	63.5
Positive word-of-mouth comments	0.886				
Positive online comments	0.801				
Number of return visitors	0.787				
Post-visit comments	0.390				
Factor 2: Satisfying brand experiences factor		0.62	3.21	0.30	67.1

Destination brand offers value for money	0.797				
Destination brand delivers as promised	0.786				
Destination brand uses healthy business ethics	0.717				
Destination is attractive	0.355				
Extraction method: Principal component analysis. Rotation method: Oblimin with Kaiser normalization; analysis N = 301. Mean calculated from a minimum of 1 and a maximum of 5.					

Satisfaction recommendations were considered a new factor of destination competitiveness, which was explained by 63.5% of the variances. This factor yielded a reliability alpha coefficient of 0.72, indicating that there is a comparatively high internal consistency among the items that were loaded for factor analyses. Table 6.19 shows that the mean score for the factor was 4.24 indicating that the level of satisfaction is an important factor in determining destination competitiveness of Zimbabwe as a tourism destination. The factor also had an inter-item correlation of 0.37. The sampling adequacy was 0.63 and a Bartlett's test of sphericity being a $p < 0.001$, which was statistically significant. Positive word-of-mouth comments have the strongest association with the underlying latent variable, with a factor loading of 0.886, while post visit comments are considered marginally important with a factor loading of 0.390.

The second factor to emerge from the level of satisfaction grouping aspects was labelled as satisfying brand experiences and was considered to be a new factor, although in this component's elements, a factor such as value of money is supported by the research done by Du Plessis *et al.* (2015) and Du Plessis and Saayman (2017). Therefore, this factor was regarded as new and unique to the empirical context of Zimbabwe as a tourism destination. The factor had a reliability coefficient of 0.62 indicating that there is internal consistency among the items that were entered for analyses. The inter-item correlation was 0.3 while the total variance explained was 67.1%. The mean score for this factor was 3.21 indicating that it is a relatively important factor in the determination of destination competitiveness of Zimbabwe as a destination. Table 6.19 presents the empirical results in relation to the satisfying brand experiences factor. Based on the empirical results, the ability of the destination to offer value for money has the strongest association with the underlying latent variable, with a factor loading of 0.797. However, the attractiveness of a destination emerged as a

marginally important item/element in relation to the satisfying brand experiences variable and overall competitiveness of brand Zimbabwe as tourism destination.

Group 2: Destination branding returns investment elements

The aim of this group of elements was to measure the returns on destination branding using objective tourism outputs such as the increase in visitor numbers, international competitiveness rankings of the tourism destination, length of stay and employment growth, among others. The group had a total of 10 elements that were loaded for factor analyses and it generated two factors. All the elements were retained for further analysis and modelling. The two factors that emerged were labelled as destination branding outputs and brand growth.

Table 6.20: Factor analyses of returns on destination branding elements

Destination Branding Returns elements	Factor loading	Cronbach Alpha	Mean	Inter-item correlation	Variance %
Factor 1: Destination branding outputs		0.87	2.50	0.49	65.1
Length of stay	0.817				
Visitor numbers	0.802				
Market share	0.801				
International competitiveness rankings	0.799				
Correspondence of marketing and tourist spending	0.731				
Government expenditure towards tourism	0.684				
Tourists' trust of the new brand	0.607				
Factor 2: Brand growth		0.51	3.68	0.36	65.1
Effectiveness of events and festivals	0.761				
Tourist spending on new products	0.695				
Employment growth	0.654				
Extraction method: Principal component analysis. Rotation method: Oblimin with Kaiser normalization; analysis N = 301. Mean calculated from a minimum of 1 and a maximum of 5.					

Destination branding outputs factor had a mean score of 2.50 indicating that Zimbabwe as a tourism destination is not very competitive in terms of length of stay, visitor numbers, markets share etc. The factor had a reliability coefficient of 0.87 indicating that the items had a relatively high internal consistency, hence closely

related. Thus, this factor measured the returns on destination branding in relation to tourism outputs such as visitor numbers, length of stay, market share etc. The score for the KMO for this factor was 0.81 and the data explained 65.1% of the variances. Table 6.20 presents the factor analysis of destination branding tourism outputs.

Length of stay has the strongest association with the underlying latent variable, with a factor loading of 0.817. The result implies that length of stay is particularly important for destination competitiveness given its ability to affect tourism revenue through hotel occupancies and spending. Length of stay is a basic characteristic of a holiday and Zimbabwe must strive to develop policies that encourage longer holidays since it affects the general revenue structure of the tourism industry, given the analysis of demand results showed a strong trend towards shorter holiday stays in Zimbabwe (c.f. Table 5.2). The item relating to whether the tourists are able to trust the new destination brand (***Zimbabwe: A World of Wonders***) emerged to be marginally important in terms of its association with the underlying latent factor (loading 0.607).

The second factor in relation to the destination branding returns group was labelled brand growth. The factor had a mean score of 3.68 indicating that brand growth is a critical factor in determining the competitiveness of Zimbabwe as a tourism destination over a period of time. The factor had a reliability coefficient of 0.51, which can be improved. The sampling adequacy for this factor was 0.81 and yielded 65.1% in total variances explained. No elements were eliminated in this factor. Based on the analysis of empirical results presented in Table 6.20, events and festivals as part of brand growth have the strongest association with the underlying latent variable; with a factor loading of 0.761, and this finding could be crucial in dealing with Zimbabwe's seasonality challenge. This finding was found to be consistent with studies conducted by Heath (2003) and Lee and King (2009) who found that events and festivals are an important element in determining brand growth and destination competitiveness. This result implies that it is important for Zimbabwe to broaden its tourism product mix diversification portfolio through development of new tourism products and services given the seasonality nature of its tourism business. Employment growth emerged as marginally important with a factor loading of 0.654.

Group 3: Destination quality elements

The purpose of this group was to reflect on the importance of destination quality elements in influencing the destination competitiveness of Zimbabwe. Four elements were loaded for factor analyses, and one of the elements was eliminated because it did not contribute to a simple factor structure and, therefore, failed to meet the minimum criteria of having a primary loading of above 0.3. The problematic element was "destination enjoys good Wi-Fi and Internet connectivity". After conducting the factor analyses, the factor had a reliability alpha score of 0.70 indicating that the items had a high internal consistency. The sampling adequacy of the factor was 0.53 with a 65.5% variance explained. The factor had a mean score of 4.11 indicating that destination quality is an important destination competitiveness factor in the context of Zimbabwe as a tourism destination. Table 6.21 shows the empirical factor analyses results of destination quality.

Table 6.21: Factor analyses of destination quality elements

Destination quality elements	Factor loading	Cronbach Alpha	Mean	Inter-item correlation	Variance %
Factor 1:Destination quality factor items		0.70	4.11	0.36	65.5
Effective human resources	0.752				
Tourist receipts as an indicator of destination quality	0.639				
Ground and airport infrastructure	0.628				
Extraction method: Principal component analysis. Rotation method: Oblimin with Kaiser normalization; analysis N = 301. Mean calculated from a minimum of 1 and a maximum of 5.					

Effective human resources emerged as the item with the strongest association with destination quality as an underlying latent variable, with a factor loading of 0.752. This implies that effective human resources are important for quality services delivery in Zimbabwe as a tourism destination. Tourist receipts are also an important indicator of destination quality and the association with the underlying latent variable generated a factor loading of 0.639. Ground and airport infrastructure emerged as a marginally important factor item with the underlying latent variable with a factor loading of 0.628.

This element supports and confirms literature by Gomezjl and Mihalic (2008) who indicated that transport infrastructure is an important element in determining a tourism destination's competitiveness.

Group 4: Quality human resources elements

The group aimed at evaluating the quality of human resources in Zimbabwe and how the quality affects destination competitiveness. Initially 5 broad elements of human resources quality were loaded for factor analyses. After running the analysis, the element of "Zimbabwean tourism employers prefer to hire foreign labour" was eliminated because it did not contribute to the simple factor structure and failed to meet the minimum criteria of having a primary loading of 0.3, hence it was eliminated. Table 6.22 shows that the factor had a reliability alpha of 0.70 showing that the items entered in the group had a high level of internal consistency. The factor also generated a KMO of 0.70. Inter-item correlations were 0.36 with a total variance explained of 57.3% while the mean value for this factor was 3.70 indicating that the quality of human resources in the tourism industry is an important factor of Zimbabwe's competitiveness as a tourism destination.

Table 6.22: Factor analyses of quality human resources elements

Human resources quality elements	Factor loading	Cronbach Alpha	Mean	Inter-item correlation	Variance %
Factor 1: Quality Human Resources		0.70	3.70	0.36	57.3
Quality of educational system	0.785				
Qualified tourism and hospitality staff	0.780				
Local availability of specialised research and training	0.772				
Staff training	0.51				
Extraction method: Principal component analysis. Rotation method: Oblimin with Kaiser normalization; analysis N = 301. Mean calculated from a minimum of 1 and a maximum of 5.					

The quality of the educational system has the strongest association with the underlying latent variable, with a factor loading of 0.785. This result indicates that a quality educational system is imperative for destination competitiveness and destination

innovation in Zimbabwe. Additionally, for Zimbabwe to be competitive, it requires qualified tourism and hospitality staff (factor loading of 0.780) because this affects service delivery and tourist satisfaction. Staff training emerged as a marginally important item for the underlying latent variable, with a factor loading of 0.51.

Group 5: Destination attractiveness elements

Reitsamer, Brunner-Sperdin and Stokburger-Sauer (2016:93), argue that destination attractiveness is a demand side perspective that regards destinations as suppliers of spatial tourism services with specific destination resources and environments that must be managed effectively. Thus, since the study involved a supply side survey, it was important to do the exploratory analysis for a destination attractiveness group, as a way of informing policy-makers about the factors that must be managed well to ensure a sustainable attractive destination brand. Destination attractiveness is a critical element that influences the competitiveness of a tourism destination, and in this context, brand Zimbabwe.

There were 11 observed elements that were loaded for factors analyses in this grouping and all of them had loadings that were greater than 0.3 and thus were all retained for further analyses and modelling. The group yielded two factors that were labelled cultural attractiveness and natural attractiveness. These factors are consistent with the findings of Bahar and Kozak (2007) who extracted cultural and natural attractiveness in their study as potential determinants of destination competitiveness. Elements that were used for these factors are widely used in the tourism literature but differently labelled (*see,* Du Plessis *et al.,* 2015; Naude & Saayman, 2005; Lee & King, 2009; Gomezelj & Mihalic, 2008; Crouch, 2007, 2011).

Table 6.23: Factor analyses of destination attractiveness elements

Destination attractiveness elements	Factor loading	Cronbach Alpha	Mean	Inter-item correlation	Variance %
Factor 1: Cultural attractiveness		0.70	4.03	0.37	57.3
Local cuisine	0.780				
Destination's unique history	0.735				
Museums and monuments	0.694				

Special events and festivals	0.693				
Interesting architecture	0.655				
Destination's nightlife	0.531				
Destination's different cultures	0.454				
Factor 2: Natural attractiveness		0.74	4.24	0.37	57.3
Destination's visual appeal	0.770				
Visitor safety	0.690				
Climate and weather	0.620				
Well known landmarks	0.600				
Extraction method: Principal component analysis. Rotation method: Oblimin with Kaiser normalization; analysis N = 301. Mean calculated from a minimum of 1 and a maximum of 5.					

Table 6.23 shows that the cultural attractiveness factor had the highest mean score of 4.03 indicating that it is the most important factor in determining the competitiveness of Zimbabwe as a tourism destination. The cultural attractiveness factor had a reliability alpha coefficient of 0.70 indicating that the items are closely related. The sampling adequacy for cultural attractiveness was 0.70 with an inter item correlation of 0.37. Destination attractiveness based on cultural attractions explained 57.3% of the variance. Local cuisine shows the strongest association with the underlying latent variable with a factor loading of 0.780. This finding is consistent with the findings of Guan and Jones (2015:429) who argued that, local cuisine contributes to China's destination attractiveness. Local cuisine was followed by the destination's unique history that had a factor loading of 0.735. Thus, if the destination is to build a competitive destination brand, it has to exploit its local cuisine, history and monuments, among other important items. The destination's diverse cultures emerged a marginally important factor item with a factor loading of 0.454.

The second factor of destination attractiveness was based on natural tourist attractions and was, therefore, labelled natural attractiveness. Natural attractiveness had a mean score of 4.24, indicating that the natural attractions are an important factor in determining the competitiveness of Zimbabwe as a tourism destination. The factor had a reliability alpha coefficient of 0.74 indicating that the factor items had high levels of internal consistency. The KMO sampling adequacy of the factor was 0.75 while its total

explained variances for destination attractiveness based on natural attractions was 57.3%.

Table 6.23 shows the empirical results of the factor analyses of natural attractiveness. The most important factor is the destination's visual appeal, as results presented in Table 6.23 show that the item has the strongest association with the underlying latent variable, with a factor loading of 0.770. Other important factors are visitor safety, climate and weather. Well-known landmarks emerged as a marginally important factor with a factor loading of 0.600, implying that Zimbabwe does not need much destination marketing investments for well-known landmarks such as the Victoria Falls.

Group 6: Destination management practices elements

Mihalic (2000:65) notes that research that addresses various elements of destination competitiveness from a management perspective has been little and unsystematic. There is no doubt that destination competitiveness can be increased if destinations are managed using good management practices (Klimek, 2013:27; Zehrer, Smeral & Hallmann, 2017:61). The purpose of this group of destination competitiveness aspects was aimed at determining the importance of destination management practices on destination competitiveness in the context of Zimbabwean tourism.

A total of 9 observable elements were loaded for analysis of this grouping, with one that dealt with "the provision of good tourism information" being dropped as a problematic element. The reliability coefficient of this group was an alpha value of 0.75 with a sampling adequacy measure of 0.70. Table 6.24 shows the inter-item correlation of the elements was 0.31. The destination management practices group had a mean score of 2.96 indicating that the destination's management practices require some kind of attention in building a competitive Zimbabwean tourism industry. The factor had a total explained variance of 57.4%.

Table 6.24: Factor analyses of destination management practices elements

Destination management practices elements	Factor loading	Cronbach Alpha	Mean	Inter-item correlation	Variance %
Factor 1: Destination management		0.75	2.96	0.31	57.4
Periodic marketing and brand research	0.759				
Innovative tourism destination	0.757				
DMO's monitoring and evaluation of destination performance	0.754				
Destination coordination and alliances	0.580				
Commitment towards development of a favourable destination brand	0.578				
Stakeholder accountability	0.500				
Community support towards sustainable tourism	0.479				
Private sector support	0.439				
Extraction method: Principal component analysis. Rotation method: Oblimin with Kaiser normalization; analysis N = 301. Mean calculated from a minimum of 1 and a maximum of 5.					

Periodic marketing and destination brand research by the destination's marketing organisation emerged as an important factor item. The factor item shows the strongest association with the underlying latent variable, with a factor loading of 0.759. Marketing and brand research is very important for informing policy and destination strategies given that tourist behaviour is always changing. Another important factor item is the need to innovate as this allows the destination to deal with the seasonality challenge. Private sector support emerged as a marginally important factor item with a factor loading of 0.439.

Group 7: Effectiveness of destination brand management strategy elements

This group had a mean score of 2.50 indicating that Zimbabwe's destination brand management strategy has not been effective in projecting Zimbabwe as a competitive tourism destination. The brand strategy effectiveness factor generated a reliability alpha coefficient of 0.92, indicating a very high close relationship between the factor items that were loaded in for factor analyses. The group also produced a very high sampling adequacy measure of 0.92. Table 6.25 shows that the inter-item correlations were 0.5 while the total explained variance of 66.8%. As competition continues to grow globally, there is need for tourism in Zimbabwe to ensure that its destination brand management is effective in terms of positioning itself as a **"*Zimbabwe: World of Wonders*"** that attracts tourists who spend more and stay longer in the destination. A total of 11 observable elements were loaded in this group for factor analyses and all of the elements were retained for further analysis.

Table 6.25: Factor analyses for effectiveness of destination brand strategy elements

Brand Strategy Effectiveness elements	Factor loading	Cronbach Alpha	Mean	Inter-item correlation	Variance %
Factor 1: Brand strategy effectiveness		**0.92**	**2.50**	**0.50**	**66.8**
Arrivals, length of stay, market share, employment increased due to rebranding	0.834				
Effectiveness of trade events	0.834				
Destination management to position itself as" World of Wonders"	0.832				
Effectiveness of brand ambassador programmes since 2006	0.832				
Effectiveness of destination marketing communications in dealing with perception management	0.805				
Destination brand loyalty	0.802				

Destination's ability to attract tourism investors	0.758				287
Improved destination image	0.752				
Attracting more high spending tourists	0.748				
Meeting destination branding objectives	0.706				
Effectiveness of social media in dealing with perception management	0.473				
Extraction method: Principal component analysis. Rotation method: Oblimin with Kaiser normalization; analysis N = 301. Mean calculated from a minimum of 1 and a maximum of 5.					

The factor was considered as a new factor that contributes to Zimbabwe's destination competitiveness, although elements that were loaded in this factor support research done by Pike and Page (2014); Assaker *et al.* (2011) and Heath (2003). The important items for the underlying latent variables include tourism outputs such as arrivals, length of stay, market share etc. that had a factor loading of 0.834, showing a strong association. This implies that, for Zimbabwe's destination brand strategy to be considered effective, it must produce objective outcomes such as arrivals, length of stay and market share. Additionally, trade events also emerged as important factor items that destinations must consider when evaluating the effectiveness of the destination's management strategy. In the context of Zimbabwe, it is also important to consider the effectiveness of brand ambassadorial programmes that were launched in 2006 when evaluating the overall performance of the destination's brand management strategy. Effectiveness of social media in dealing with perception management emerged as a marginally important consideration when evaluating the effectiveness of a destination's brand management strategy.

Group 8: Tourism infrastructure elements

Tourism infrastructure elements are the basis of tourism competitiveness and utilisation of existing destination resources and it includes a number of services that are considered necessary to facilitate the needs of tourists and increase tourist satisfaction during their stay; and this group's aim was to measure such. A total of 6 elements were loaded in this group for factor analyses and all factor items were

retained for further analysis. Table 6.26 shows that the factor analyses generated a reliability coefficient of 0.52, sampling adequacy of 0.50, and a total explained variance of 54.2%.

Tourism infrastructure generated a mean score of 3.93 indicating that tourism infrastructure is an important factor in determining the competitiveness of Zimbabwe as a tourism destination. Although tourism infrastructure is well documented in the wider literature, elements that contribute to the tourism infrastructure factor are likely to differ from one tourism destination to the next.

Table 6.26: Factor analyses of tourism infrastructure elements

Tourism infrastructure elements	Factor loading	Cronbach Alpha	Mean	Inter-item correlation	Variance %
Factor 1: Tourism infrastructure		**0.52**	**3.93**	**0.23**	**54.2**
Money exchange facilities	0.668				
Variety of restaurants	0.648				
Variety of shopping facilities	0.549				
Efficient tour operators	0.540				
Quality entertainment facilities	0.467				
Quality accommodation	0.346				
Extraction method: Principal component analysis. Rotation method: Oblimin with Kaiser normalization; analysis N = 301. Mean calculated from a minimum of 1 and a maximum of 5.					

Money exchange facilities have the strongest association with the underlying latent variable, with a factor loading of 0.668. This finding is consistent with the views of Saayman and Saayman (2008) who found that exchange rate and facilities were important elements in determining the competitiveness of South Africa. The variety of restaurants, shopping facilities, efficient tour operators and entertainment facilities emerged as important factor items of destination competitiveness. Quality accommodation emerged as a marginally important factor item, with a factor loading of 0.346. Bahar and Kozak (2007) note that quality infrastructure is important for building competitive tourist destinations.

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Group 9: Price competitiveness elements

The assessment of price competitiveness includes the implications of "the use of multi-currency" on first time travel decisions, as no literature has been found that has dealt with this issue before. A total of 6 elements were loaded into this group for factor analyses and one factor item that dealt with "the visitors to Zimbabwe are price elastic/sensitive" was removed for failing to load the minimum required loading. The group generated a reliability alpha coefficient of 0.65 indicating that there is a close relationship between factor items that were loaded for analysis in this group. The group's sampling adequacy is 0.64 while the total explained variance was 54.2%. The mean score for this element was relatively low at 1.9 implying that Zimbabwe is an expensive tourist destination and therefore is not competitive in terms of its pricing model, as shown in Table 6.27 below.

Table 6.27: Factor analyses of price competitiveness elements

Price competitiveness elements	Factor loading	Cronbach Alpha	Mean	Inter-item correlation	Variance %
Factor 1: Price competitiveness		**0.64**	**1.90**	**0.28**	**54.2%**
Tax policies on tourism services	0.836				
Prevailing economic conditions and price competitiveness	0.732				
Cheaper destination pricing	0.668				
Destination's prices affect long haul market negatively	-0.552				
Effects of multi-currency and vacation costs	0.439				
Extraction method: Principal component analysis. Rotation method: Oblimin with Kaiser normalization; analysis N = 301. Mean calculated from a minimum of 1 and a maximum of 5.					

Du Plessis and Saayman (2017), Du Plessis *et al.* (2015:9) and Mazanec *et al.* (2007), found pricing to be an important factor of the destination's competitiveness. This study's finding is consistent with studies done in South Africa (Du Plessis & Saayman, 2017; Du Plessis *et al.,* 2015; Saayman & Saayman, 2008; Haarhoff, 2007); and Laos

(Phakdisoth & Kim, 2007; Gomezelj & Mihalic, 2008). In line with this, it is important to note that Zimbabwe as a tourism destination is sensitive to price levels.

The tax policies on tourism services have the strongest association with the underlying latent variable with a factor loading of 0.836. A punitive tax regime that Zimbabwe is following in the tourism industry generally affects the destination's price competitiveness. The tax regime via the multiplier effect makes Zimbabwe an expensive tourism destination compared to its competitors such as South Africa, Namibia, and Botswana, thus making Zimbabwe less competitive. This, therefore, explains why the prevailing economic conditions in Zimbabwe's effect on destination competitiveness emerged as the second most important factor in terms of its association with the underlying latent variable, with a factor loading of 0.732. Effects of using a multi-currency basket in a destination have emerged as a marginally important factor item, with a factor loading of 0.439.

Group 10: Politics and policies

Politics and policies are elements that are identified and labelled differently in literature and they influence the competitiveness of tourism destinations (Dwyer & Forsyth, 2011). The group had 6 elements that were loaded for factor analyses and 2 elements ("destination is politically stable" and "print and electronic media, both in and outside Zimbabwe helps in projecting a competitive and attractive brand") were excluded as they failed to reach a minimum loading value of 0.3. Thus, four elements were retained for further analysis and modelling.

Politics and polices were identified as a destination competitiveness factor in research that was conducted in Africa. However, elements such as visa policies and political will were covered in studies by Mazanec *et al.* (2007), Enright and Newton (2005), Ritchie and Crouch (2003) and Hassan (2000). The politics and policies factor generated a reliability score of 0.53, indicating that the measure of construct is consistent and dependable. According to Table 6.28, the factor had a mean value of 3.31, indicating that politics and policies elements such as visa policies and access play a significant role in determining the competitiveness of a tourism destination. The factor had an inter-item correlation of 0.28 with a KMO sampling adequacy of 0.52 and a total variance explained of 68.1%.

Table 6.28: Factor analyses politics and policies elements

Politics and policies elements	Factor loading	Cronbach Alpha	Mean	Inter-item correlation	Variance %
Factor 13: Politics and policies		0.53	3.31	0.28	68.1
Visa policies promotes tourism	0.736				
Destination and attractions accessibility	0.708				
Political will on building competitive destination brand	0.633				
Perceived effect of corruption on competitiveness	0.347				
Extraction method: Principal component analysis. Rotation method: Oblimin with Kaiser normalization; analysis N = 301. Mean calculated from a minimum of 1 and a maximum of 5.					

Visa policies emerged as a factor item that had the strongest association with the underlying latent variable, with a factor loading of 0.736. Visas are used to control the movement of people into a tourism destination. While visas are effective for preventing entry of potential terrorists (Torpey, 1998), visa regulations have a negative influence of inbound tourism to a destination, in particular, and the economy in general. The USA imposed strict visa policies after September 11, 2001 and went on to lose US$89 billion in tourist revenue (Silva, 2011). Consequently, without promoting terrorism, Zimbabwe as a tourism destination must relax its visa regulations given the potential it has to increase destination competitiveness through visitor numbers and tourism income. Corruption emerged as marginally important with a factor loading of 0.347.

Group 11: Prosperity and investment competitiveness elements

This was the last group that was analysed using factor analyses and dealt with the prosperity and investment as outcomes of destination competitiveness. Initially 3 observable elements were loaded for factor analyses and one was subsequently removed for failing to load significance variance. The element that was deleted for the researcher to proceed with further analysis was "there is evidence of increased contribution towards GDP by the tourism industry", indicating that the respondents felt that it was obvious that the industry has to contribute towards the country's GDP. The factor had a reliability coefficient of 0.60 and a sampling adequacy of 0.50, as well as

an inter-item correlation of 0.43. The total variance explained was 81.8% and a mean score of 2.38, indicating that the contribution of Zimbabwean tourism to prosperity of destination residents and attracting investment in the tourism industry is generally weak and it is something that the policy-makers must address.

Table 6.29 below shows a comprehensive picture of the factor analyses that were done for the prosperity and investment competitiveness group.

Table 6.29: Factor analyses of prosperity and investment competitiveness elements

Prosperity and investment competitiveness	Factor loading	Cronbach Alpha	Mean	Inter-item correlation	Variance %
Factor 1: Prosperity and investment competitiveness		0.60	2.38	0.43	81.8
Evidence of prosperity of destination residents	0.843				
Destination's ability to attract FDI	0.841				
Extraction method: Principal component analysis. Rotation method: Oblimin with Kaiser normalization; analysis N = 301. Mean calculated from a minimum of 1 and a maximum of 5.					

Empirical results in Table 6.29 show that the prosperity of destination residents has the strongest association with the underlying latent variable, with a factor loading of 0.843. Ritchie and Crouch (2000) acknowledged the improvement of continuing the prosperity of destination residents as one of the core objectives for a competitive destination. It is likewise the conviction of this study that tourism in Zimbabwe must be capable of supporting long-term economic development of destination residents by means of providing them with significant sources of job opportunities and income, especially considering the long period of economic crisis that Zimbabwe has been in since the land reform programme. In addition to this, the destination must also be able to attract foreign direct investment.

In summary, the initial factor analyses of 11 group aspects resulted in 14 factors. Table 6.30 provides the summary of the most important factor elements per factor. Therefore, the most important factor elements of destination competitiveness are:

Table 6.30: A summary of important factors and elements for supply

Factor	Element	Factor loading	Mean
Satisfaction recommendations	Positive Word-of-Mouth	0.886	4.24
	Online Comments and Tourist satisfaction	0.801	
Satisfying brand experiences	Destination Brand and Value for Money	0.797	3.21
	Destination brand delivers as promised	0.786	
Destination branding outputs	Length of Stay	0.817	2.50
	Visitor Numbers	0.802	
	Market share	0.801	
Brand growth	Effectiveness of events and festivals as new products	0.761	3.68
Destination quality	Effective Human Resources	0.752	4.11
Quality Human resources	Educational System and Destination Competitiveness	0.785	3.70
	Qualified Tourism Staff	0.78	
	Local Availability of Specialised Research and Training	0.772	
Cultural attractiveness	Destination History	0.735	4.03
	Destination's visual appeal	0.77	
Natural attractiveness	Destination's visual appeal	0.77	4.24
	Visitor safety	0.69	
Destination management practices	Innovative tourism destination	0.757	2.96
	Marketing and branding research	0.759	
	DMO monitoring and evaluation	0.754	
Brand strategy effectiveness	Tourism outputs such as visitor numbers, length of stay	0.834	2.50
	Travel trade events	0.834	
	Destination Management Position	0.832	
	Brand Ambassador	0.823	
	Marketing Communications	0.805	
	Destination Brand Loyalty	0.802	
Tourism Infrastructure	Money exchange facilities	0.668	3.93
	Variety of restaurants	0.648	

Price competitiveness	Tax policies on tourism services	0.836	1.90
Politics and policies	Visa policies on tourism	0.736	3.31
	Accessibility	0.708	
Prosperity and investment competitiveness	Prosperity of destination residents	0.843	2.38
	Foreign Direct Investments	0.841	

Based on the mean scores, the following destination competitiveness factors were considered in this study as the most important destination factors that Zimbabwean tourism must look at in their destination marketing and brand strategy formulation:

- Natural attractiveness ($\bar{x}$ = 4.24);
- Satisfaction recommendations ($\bar{x}$ = 4.24);
- Destination quality ($\bar{x}$ = 4.11);
- Cultural attractiveness ($\bar{x}$ = 4.03).

The results of the factor analyses of supply all provided sufficient evidence of convergence, thus confirming the construct validity for the measuring supply survey instrument. The reliability coefficients were all above 0.5, which also confirmed that there was evidence in relation to the measurement scales that were used to measure the effects of destination branding on Zimbabwe's destination competitiveness. Thus, the data was considered appropriate to use in further statistical analyses for the study.

6.4.2 Aspects influencing destination competitiveness

The study employed One Way Analysis of Variances (ANOVAs) and Turkey's post hoc comparisons to examine any significant differences between the categories of tourism and hospitality establishments and the aspects that influence destination competitiveness in the context of Zimbabwe as a tourism destination. Additionally, the study also calculated Cohen's *d*-scores as a measure of the effect size between the differences. The effect size indicates the extent to which the elements being observed differ from each other. The guidelines used for the demand ANOVAs were also used as the guidelines for interpretation of the effect sizes for supply (refer to section 5.2.3.3). Table 6.31 below presents the ANOVAs for supply.

Statistical significant differences were identified in this study at a *p< 0.05* significance level for the general perception with regard to competitiveness of Zimbabwe as a tourism destination. The effect of size was also computed to clarify the identified differences. As shown in Table 6.31, statistical significant differences were evident on the overview of Zimbabwe's competitiveness between tourism establishment categories. Empirical results presented in Table 6.31 show that:

- Respondents in the Attractions based establishments ($\bar{x}$ = 4.24; SD=±0.35) believe that Zimbabwe is more competitive when compered with respondents from theAccommodation/Hospitality establishments ($\bar{x}$ = 4.00, *SD*=±0.46); with an effect size of 0.56 (large effect);
- A large effect size in terms of the significant differences between tourism establishments is also higher between attractions based establishments ($\bar{x}$ = 4.24, SD = 0.35) when compared withfood and beverage establishments ($\bar{x}$ = 4.00, SD = ±0.43) , with regard to the overall overview of Zimbabwe's competitiveness, as shown by a *d* = 0.55 (large effect);
- Respondents drawn from attractions based tourism establishments ($\bar{x}$ = 4.24, SD= ±0.35) rated the overview of Zimbabwe's competitiveness higher than respondents that were drawn from transport operators ($\bar{x}$ = 4.00, SD = ±0.43), with an effect size of *d = 0.55* (large effect).
- Higher perceptions with regard to the overall competitiveness of brand Zimbabwe as a tourism destination were evident among respondnets from Tourism services establishments ($\bar{x}$ = 4.16, *SD* = ±0.37) as well as those who were drawn from MICE related establishments ($\bar{x}$ = 4.13, *SD* = ±0.35).

Overall, the Attractions establishments ($\bar{x}$ = 4.24, *SD* = ±0.35), Tourism services establishments ($\bar{x}$ = 4.16, *SD* = ±0.37), MICE ($\bar{x}$ = 4.13, *SD* = ±0.46), Transport establishments ($\bar{x}$ = 4.00, *SD* = ±0.43) and Food and beverage establishments ($\bar{x}$ = 4.00, *SD* = ±0.43)   perceives Zimbabwe as more competitive when compared with other establishments. This consistent with the findings that were discussed under section 6.2.1.6 and section 6.2.1.7 were it was observed that attractions/products were the major unie selling points of both Zimbabwe and the establishments. Higher Accommodation/Hospitality ($\bar{x}$ = 3.99, *SD* = ±0.46) perceptions with regard to

Zimbabwe's competitiveness as a destination brand could be attributable to the fact that many hotels in Zimbabwe are franchised properties that must maintain the brand reputation of the franchisor's name. Overall, the food and beverage sector also perceive Zimbabwe as a competitive destination when compared with other sectors. The attractiveness of the Zimbabwean cuisine was also noted in the analysis of demand data. Therefore, there is a match between what the supply side offers and what tourists expect with regard to cuisine.

Another statistical significant difference was further found based on the rating of the categories of tourism establishments with regard to the satisfaction recommendations at *p<0.05*. Therefore, the statistical significance in relation to satisfaction recommendations is *p = 0.03*. Empirical results show that, in terms of satisfaction recommendations, there is a high effect size in relation to the statistical significance between the ratings of:

- Respondents that were drawn from transport operators ($\bar{x}$ = 3.58; *SD* = ±0.64) rated the satisfaction recommendation higher than respondents that were drawn fromattractions based establishment ($\bar{x}$ = 3.07, SD = 0.72), with an effect size of *d* = 0.71. This indicates that tourists are more satisfied in terms of tourism experience and delivery in transport based establishements than they are with attractions based establishments. This makes sense because for tourists to consume tourism attractions in Zimbabwe, there is need for efficient tour operators.

- In addition, other large effect sizes exist between transport operators ($\bar{x}$ = 3.58, *SD* = ±0.64) and food and beverage establishments ($\bar{x}$ = 3.13, *SD* = ±0.76), (*d = 0.59*; large effect; *p < 0.05*) and transport operators ($\bar{x}$ = 3.58, *SD* = ±0.64) and tourism services ($\bar{x}$ = 3.15, *SD* = ±0.74), (*d = 0.58*; large effect; *p < 0.05*) (refer to Table 6.31). Transport establishments are likely to get more satisfaction recommendations from tourists because they are a critical element in the consumption of the tourism experience. These establishments are the first to be involved with the customer when they pick them from the Airport for instance, and the last to be involved with the tourists when the transport them to the Airport for departure.

There is a statistical significant difference between tourism establishments and the satisfying brand experiences of the tourists as a determinant of destination competitiveness of brand Zimbabwe. The statistical significance is a *p = 0.04*. The effect size between:

- Respondents from Attractions based establishments ($\bar{x}$ = *4.36, SD* = ±0.43) argued that they are able to offer more satisfying brand experiences than those in the MICE related establishments ($\bar{x}$ = 4.08, SD= 0.23) with a large effect size of (*d = 0.64; p<0.05*). The MICE industry is a relatively new phenomenon, that is yet to be completely embraced by Zimbabwean tourism;

- A *d*-value of 0.5 exists between attractions based establishments ($\bar{x}$ = 4.36, *SD* =±0.43) and accommodation/hospitality establishments ($\bar{x}$ = 4.14, *SD* = ±0.44), signifying a large effect size in relation to the statistical significant differences.

- Overall, perceptions about satisfying brand experiences as a significant aspects of brand Zimbabwe's competitiveness as a tourism destination were found to be higher among Attractions based establishments ($\bar{x}$ = 4.36, *SD* = ±0.43), Food and beverage extablishments ($\bar{x}$ = 4.29, *SD* = ±0.40), Tourism services ($\bar{x}$ = 4.26, *SD* = ±0.36) and Transport Operators ($\bar{x}$ = 4.19, *SD* = ±0.43) ; indicating that Zimbabwe's tourism and hospitality establishments offer better service delivery, contributing towards more satisfying brand experiences.

The results presented in Table 6.31 show that there is a statistical significant differences between the tourism establishments' categories and cultural attractiveness. The statistical significance was computed as *p = 0.01* which is less than the *p<0.05*. Based on the results in Table 6.31, large effect sizes exist between:

- Attractions based establishments ($\bar{x}$ = 4.20, SD = ±0.43) and transport operators ($\bar{x}$ = 3.87, SD = ±0.34), *d* = 0.77; p<0.05); indicating that attractions based establishments think Zimbabwe is culturally attractive based on the rich cultural resources supporting the tourism industry;

- Respondents from. attractions based establishments ($\bar{x}$ = 4.2*0, SD = 0.43*) perceived brand Zimbabwe's cultural attractiveness to be more competitive when compared with respondents that were drawn from theFood and beverage establishments ($\bar{x}$ = 3.96, SD = 0.39), with an effect size of *d* = 0.56; *p<0.05*);

- Respondents from the MICE related establishments ($\bar{x}$ = 4.16, SD = 0.42) perceive the cultural attractiveness of Zimbabwe as more competitive when compared with respondents that were drawn from the Transport operators ($\bar{x}$ = *3.87, SD = ±0.34*), (*d* = *0.70; p<0.05*). Therefore, MICE related establishments perceive brand Zimbabwe is a competitive destination based on its cultural attractiveness.

- Resepondents drawn from the MICE related organisations ($\bar{x}$ = 4.16, SD = ±0.42) perceive brand Zimbabwe to be more competitive as a result of its cultural attractiveness when compared with respondnets drawn fromfood and beverage establishments ($\bar{x}$ = 3.96, SD= ±0.39) vs *d* = *0.48; p<0.05*).

Overall, the perception about the competitiveness of brand Zimbabwe as a result of its cultural attractiveness factor was higher among respondents from:

- the attractions based ($\bar{x}$ = 4.20*, SD* = *0.*43);
- MICE ($\bar{x}$ = 4.16, SD = 0.42); and
- Tourism services ($\bar{x}$ = 4.04*, SD* = 0.42).

It can also be seen that Food and beverage establishments also perceive Zimbabwe as competitive primarily because of their involvement in offering culturally made dishes. Therefore, brand Zimbabwe's cultural tourism is critical for enhancing the destination's competitiveness and could also act as the destination's diversification tool.

Another statistical significance level was found between tourism establishment categories and brand strategy effectiveness, at a significance level of *p* = 0.00. Large effect sizes are present between:

- Transport operators ($\bar{x}$ = 2.87, SD= 0.76) vs MICE ($\bar{x}$= 2.26, SD= 0.54), *d* = *0.81; p<0.05*); Transport operators are of the view that Zimbabwe's brand strategy has been effective and thus contributes towards destination competitiveness as compared to MICE related establishments. This is attributable to the fact that even in times of crisis, people still travel, and hence transport operators will still have some kind of business. However, this is not possible for MICE related industries.

- Accommodation based establishments ($\bar{x}$ = 2.52, SD= 0.78) and attractions based establishments ($\bar{x} = 2.07$, SD= 0.69) as denoted by a *d = 0.57; p < 0.05;* Accommodation/hospitality establishments consider the branding strategy Zimbabwe is using to be relatively effective. This could be attributable to the fact that, since 2009, tourism occupancies have been increasing as a result of the stabilisation of the economy, following the formation of the coalition government between ZANU PF and the MDC. This arrangement also improved the general perception about Zimbabwe as a tourism destination (Woyo & Woyo, 2016; Woyo, 2013).

- The ratings by respondents from the transport related establishments ($\bar{x}$ = 2.87, SD = 0.76) when compared with respondents drawn from food and beverage establishments ($\bar{x}$ = 2.44, SD = 0.73); the effect of size generated was *d = 0.57; p < 0.05.* The cost of travelling in Zimbabwe is more competitive than the cost of buying food, because an average meal in restaurants in resorts places in Zimbabwe is USD$25, and this could explain the variation between the two establishments.

Centred on these ratings, it therefore seems that the destination's brand management strategy is yet to provide more value to tourism and hospitality players in all sectors because all the mean scores are less than 3.0. This could be attributable to shorter holidays that were also noted in this study (c.f. Table 5.2). It is crucial that the destination carries out marketing and brand research from time to time to determine the effectiveness of the strategy in the tourism industry.

Table 6.31: ANOVAs: Destination competitiveness factors by category of establishment

Variable	Tourism establishments categories	N	Mean	Std. Dev	F	Sig.	Effect sizes				
Overview of Zimbabwe's competitiveness	Accommodation/ Hospitality	51	3.99	±0.46	3.396	**0.01**					
	Food and Beverage	36	4.00	±0.43			0.05*				
	Attractions based	49	4.24	±0.35			**0.56******	**0.55******			
	Transport operators	36	4.00	±0.43			0.05*	0.00*	**0.55******		
	MICE	15	4.13	±0.35			0.32***	0.29**	0.32***	0.29**	
	Tourism services	114	4.16	±0.37			0.38***	0.36***	0.22**	0.36***	0.07*
Satisfaction recommendations	Accommodation/ Hospitality	51	3.26	±0.75	2.566	**0.03**					
	Food and Beverage	36	3.13	±0.76			0.18**				
	Attractions based	49	3.07	±0.72			0.26**	0.08*			
	Transport operators	36	3.58	±0.64			0.42***	**0.59******	**0.71******		
	MICE	15	3.30	±0.70			0.05*	0.23**	0.32***	0.40***	
	Tourism services	114	3.15	±0.74			0.15**	0.03*	0.11**	**0.58******	0.21**
Satisfying brand experiences	Accommodation/ Hospitality	51	4.14	±0.44	2.337	**0.04**					

	Group	n	Mean	SD	F	p					
	Food and Beverage	36	4.29	±0.40			0.35***				
	Attractions based	49	4.36	±0.43			**0.50******	0.15**			
	Transport operators	36	4.19	±0.43			0.12**	0.24**	0.39***		
	MICE	15	4.08	±0.28			0.12**	**0.52******	**0.64******	0.24**	
	Tourism services	114	4.26	±0.36			0.28**	0.08*	0.22**	0.17**	**0.50******
	Total	301	4.24	±0.40							
Destination branding outputs	Accommodation/ Hospitality	51	2.53	±0.61	4.822	**0.00**					
	Food and Beverage	36	2.27	±0.69			0.37***				
	Attractions based	49	2.20	±0.58			**0.54******	0.11*			
	Transport operators	36	2.83	±0.73			0.41***	**0.77******	**0.87******		
	MICE	15	2.61	±0.58			0.14**	**0.50******	**0.71******	0.30***	
	Tourism services	114	2.58	±0.76			0.08*	0.42***	**0.51******	0.32***	0.03*
	Total	301	2.50	±0.71							
Brand growth	Accommodation/ Hospitality	51	3.73	±0.72	1.072	0.38					
	Food and Beverage	36	3.49	±0.95			0.25**				
	Attractions based	49	3.62	±0.75			0.14**	0.13**			

		N	Mean	SD	F	p					
	Transport operators	36	3.69	±0.72			0.06	0.20**	0.09*		
	MICE	15	3.56	±0.64			0.24	0.07*	0.08*	0.18**	
	Tourism services	114	3.76	±0.55			0.05*	0.29**	0.19**	0.11**	0.33***
	Total	301	3.68	±0.70							
Quality Human resources	Accommodation/ Hospitality	51	3.77	±0.80	0.563	0.73					
	Food and Beverage	36	3.74	±0.56			0.03*				
	Attractions based	49	3.57	±0.69			0.25**	0.26**			
	Transport operators	36	3.77	±0.76			0.00*	0.04*	0.27**		
	MICE	15	3.73	±0.57			0.05*	0.02*	0.24**	0.05*	
	Tourism services	114	3.68	±0.72			0.11**	0.09*	0.16**	0.12**	0.07*
	Total	301	3.70	±0.71							
Cultural attractiveness	Accommodation/ Hospitality	51	4.02	±0.44	3.249	**0.01**					
	Food and Beverage	36	3.96	±0.39			0.14**				
	Attractions based	49	4.20	±0.43			0.41***	**0.56******			
	Transport operators	36	3.87	±0.34			0.35***	0.23**	**0.77******		
	MICE	15	4.16	±0.42			0.32***	0.48***	0.09*	**0.70******	

		N	Mean	SD	F	p					
	Tourism services	114	4.04	±0.42			0.03*	0.18**	0.38***	0.39***	0.30***
Natural attractiveness	Accommodation/ Hospitality	51	4.20	±0.36	1.765	0.12					
	Food and Beverage	36	4.18	±0.31			0.06*				
	Attractions based	49	4.38	±0.40			0.46***	0.51****			
	Transport operators	36	4.16	±0.43			0.10*	0.05*	0.52****		
	MICE	15	4.25	±0.42			0.12**	0.16**	0.31***	0.21**	
	Tourism services	114	4.24	±0.44			0.09*	0.14**	0.32***	0.19**	0.02*
Destination management	Accommodation/ Hospitality	51	3.00	±0.61	0.463	0.80					
	Food and Beverage	36	3.01	±0.65			0.01*				
	Attractions based	49	2.85	±0.69			0.23**	0.23**			
	Transport operators	36	2.99	±0.50			0.03*	0.03*	0.20**		
	MICE	15	2.96	±0.55			0.08*	0.08*	0.16**	0.06*	
	Tourism services	114	2.98	±0.61			0.04*	0.04*	0.19**	0.01*	0.04*
Brand strategy effectiveness	Accommodation/ Hospitality	51	2.52	±0.78	4.705	**0.00**					
	Food and Beverage	36	2.44	±0.73			0.11**				
	Attractions based	49	2.07	±0.69			**0.57******	**0.50******			

Category	Sub-category	N	Mean	SD	F	p					
	Transport operators	36	2.87	±0.76			0.45***	**0.57******	**1.00******		
	MICE	15	2.26	±0.54			0.33***	0.25**	0.27**	**0.81******	
	Tourism services	114	2.53	±0.89			0.01*	0.11**	**0.52******	0.38***	0.31***
Tourism Infrastructure	Accommodation/ Hospitality	51	3.95	±0.56	0.526	0.76					
	Food and Beverage	36	3.88	±0.57			0.12**				
	Attractions based	49	3.99	±0.46			0.07*	0.19**			
	Transport operators	36	3.99	±0.56			0.07*	0.19**	0.01*		
	MICE	15	4.00	±0.45			0.09*	0.21**	0.02*	0.01*	
	Tourism services	114	3.88	±0.53			0.12**	0.00*	0.20**	0.20**	0.22**
Price competitiveness	Accommodation/ Hospitality	51	1.96	±0.59	1.471	0.20					
	Food and Beverage	36	1.99	±0.54			0.06*				
	Attractions based	49	1.75	±0.52			0.35***	0.45***			
	Transport operators	36	2.04	±0.55			0.14**	0.09*	0.53****		
	MICE	15	1.88	±0.52			0.14**	0.21**	0.25**	0.30***	
	Tourism services	114	1.98	±0.63			0.03*	0.02*	0.36***	0.10*	0.16**
Politics and policies	Accommodation/ Hospitality	51	3.24	±0.73	1.114	0.35					

		N	Mean	SD							
	Food and Beverage	36	3.23	±0.76			0.01*				
	Attractions based	49	3.40	±0.81			0.19**	0.21**			
	Transport operators	36	3.21	±0.77			0.04*	0.03*	0.23**		
	MICE	15	3.65	±0.50			0.56****	0.56****	0.31***	0.57****	
	Tourism services	114	3.30	±0.70			0.09*	0.10*	0.11**	0.13**	0.49***
Prosperity and investment competitiveness	Accommodation/ Hospitality	51	2.33	±1.00	0.244	0.94					
	Food and Beverage	36	2.39	±0.82			0.06*				
	Attractions based	49	2.40	±1.01			0.06*	0.01*			
	Transport operators	36	2.33	±0.96			0.00*	0.06*	0.06*		
	MICE	15	2.63	±0.90			0.30**	0.27**	0.23**	0.31***	
	Tourism services	114	2.38	±1.02			0.04	0.01*	0.02*	0.04*	0.25**

Statistically significant difference: $p \leq 0.05$ (Sullivan & Feinn, 2012:281); Effect sizes key: *d=0.1: trivial effect; ** d=0.1-0.3 small effect; *** d=0.3-0.5: moderate effect; ****d>0.5 large effect

Based on the empirical results presented in Table 6.31 above, satisfying brand experiences as a source of destination competitiveness come from tourism establishments that operate under the attractions based category ($\bar{x}$ = 4.36, SD = ±0.43). This corroborates with the demand findings where it was found that tourists agree and strongly agree that Zimbabwe has unique tourism attractions. The contribution to satisfying brand experiences is generally high among establishments in Zimbabwe. Transport operators contribute to satisfaction recommendations as a source of destination competitiveness ($\bar{x}$ = 3.58, SD = ±0.64). Attractions based establishments ($\bar{x}$ = 4.20, SD = ±0.43) generally perceive that cultural attractiveness is a significant factor that contributes towards Zimbabwe's competitiveness. Generally, the establishments in Zimbabwe feel that the destination's brand strategy has not been effective in stimulating tourist numbers, market share, improving international competitiveness etc. Thus, tourism establishments feel that more is required for the strategy to contribute meaningfully towards destination competitiveness in Zimbabwe.

6.4.3 Relationships among supply factors

Table 6.32 points out the following positive correlations among the various destination competitiveness factors. A large positive significant correlation coefficient (*rho = 0.50 – 1.0*) exists between destination competitiveness factors as shown in Table 5.59:

- Brand strategy effectiveness and destination branding outputs (*rho = 0.606; p < 0.01)* indicating that when the destination's brand management strategy is effective, tourism outputs such as visitor numbers, length of stay, market share, tourist spending etc. will relatively increase.

- Price competitiveness and brand strategy effectiveness (*rho = 0.603; p < 0.00*); indicating that price plays a pivotal role in ensuring the destination's brand management strategy is effective. It also indicates that, for Zimbabwe to be attractive and competitive, the destination management strategy must address critical pricing challenges that were identified in both the supply and demand surveys.

- Quality of human quality and satisfying brand experiences (*rho = 0.518; p < 0.01);* indicating that the level of service delivery directly influences satisfying brand experiences of tourists.

There were no large negative significant correlations between destination competitiveness factors. Medium significant correlations (*rho* = 0.30 – 0.49) that exist between destination competitiveness factors as indicated in Table 6.32:

- Price competitiveness and destination branding outputs (*rho = 0.494; p < 0.01*). This implies that, if Zimbabwe is to be competitive in terms of attracting more tourists and increasing their market share etc. the destination must have competitive prices when compared to competition.

- Politics and policies and tourism infrastructure (*rho = 0.45; p < 0.001*). This finding implies that good policies and politics are critical in influencing the infrastructural development of a destination. During descriptive analysis, the study also found that the government support towards tourism is very low and this has an implication in terms of developing tourism infrastructure and amenities that were found in the demand survey to be key attractiveness factors.

- Prosperity and investment when correlated with satisfying brand experiences, a medium significant relationship was found (*rho = 0.405; p < 0.01*). This could imply that when Zimbabwe improves in terms of its economic competitiveness, through the prosperity of residents and invest more in the recreation facilities for example, the industry will be able to generate brand-satisfying experiences that tourists seek. This would, in turn, increase visitorship and further enhance the destination's economic competitiveness through an increase in tourism income.

- Tourism infrastructure and satisfying brand experiences (*rho = 0.395; p < 0.001*). Tourism infrastructure was identified as a key factor for destination competitiveness and attractiveness. Therefore, when Zimbabwe increases investment in tourism infrastructure, the chances of increasing satisfying brand experiences will also increase, enhancing the country's competitiveness. An increase in brand satisfying experiences will help Zimbabwe attract more tourists and this will generate more income that can be used to improve the tourism infrastructure in the country.

- Destination branding outputs and brand growth (*rho = 0. 387; p < 0.01*). The relationship between destination branding outputs and brand growth is symbiotic. This implies that brand Zimbabwe will grow when destination

branding outputs, like market share, tourism numbers, tourism income, and repeat visitation etc. increase.

Small significant correlations (*rho* = 0.10 – 0.29) that exist between destination competitiveness factors as indicated in Table 6.32:

- Prosperity and investment factor produced small significant correlations with price competitiveness (*rho = 0.294; p < 0.001*). As a destination improves in terms of its economic competitiveness by means of prospering destination residents and an increase in foreign direct investment, it will also improve its competitiveness in terms of prices. Therefore, for Zimbabwe to be price competitive there is need for the destination to ensure that it improves the prosperity and investment factor of destination competitiveness. This will also help the destination to significantly improve its international competitiveness ranking, which is relatively low as indicated in the current WEF 2017 report.

- Price competitiveness and satisfying brand experiences (*rho = 0.289; p < 0.001*). Price is a critical competitiveness factor and it has a direct impact on whether experiences are satisfying. Therefore, if Zimbabwe is to be competitive in providing satisfying brand experiences, there is need for its tourism products and services to be competitively priced.

- Destination management practices and satisfying brand experiences (*rho = 0.288; p < 0.001*). Good destination management practices are important for Zimbabwe to create satisfying brand experiences. Without good destination management practices such as stakeholder involvement, private sector support, and periodic marketing research etc., Zimbabwe will struggle to create satisfying brand experiences as has been seen by its failure to reduce police roadblocks despite spirited calls from the tourism industry about the implications they have on destination image.

- Destination management practices and brand growth (*rho = 0.287; p < 0.001*). This finding implies that the destination's brand can only grow in situations where there are good destination management practices. This finding is consistent with findings in literature (Azzopardi & Nash, 2017; Heath, 2003; Ritchie & Crouch, 2003).

- Natural attractiveness and satisfaction recommendations (*rho = 0.284; p < 0.001*). This implies that if a destination has natural attractions such as the Victoria Falls etc., it is guaranteed to receive positive satisfaction recommendations that will help in enhancing destination competitiveness.

- Prosperity and investment when correlated withbrand strategy effectiveness aslo generated small significant relationship (*rho = 0.277; p < 0.001*). This finding implies that branding strategies in a destination context are only effective when the destination is able to enhance the livelihood of its residents and attracting new investment in the tourism sector. This could be explained by the responses that were found in this study where it was mentioned that the tax regime for tourism industry in Zimbabwe is "cruel". Such a policy generally affects brand strategy effectiveness because what Zimbabwe as a government is concerned with at the moment is to finance its operations since it is broke. Therefore, prosperity and investment is a precondition upon which ***Zimbabwe: A World of Wonders*** can be successfully and effectively implemented.

Table 6.32: Correlation matrix for supply (destination competitiveness factors)

Variable		SR	SBE	DBO	BG	QHR	CA	NA	DMP	BSE	TI	PC	PP	PI
SR	Correlation Coefficient	1												
	Sig. (2-tailed)													
	N	301												
SBE	Correlation Coefficient	0.08	1											
	Sig. (2-tailed)	0.167												
	N	301	301											
DBO	Correlation Coefficient	.387**	-.241**	1										
	Sig. (2-tailed)	0.000	0.000											
	N	301	301	301										
BG	Correlation Coefficient	.150**	.162**	.174**	1									
	Sig. (2-tailed)	0.009	0.005	0.002										
	N	301	301	301	301									
QHR	Correlation Coefficient	.518**	.155**	.196**	.338**	1								
	Sig. (2-tailed)	0.000	0.007	0.001	0.000									
	N	301	301	301	301	301								
CA	Correlation Coefficient	0.06	.241**	-0.05	.277**	.218**	1							

	Sig. (2-tailed)	0.3	0.000	0.389	0.000	0.000							
	N	301	301	301	301	301	301						
NA	Correlation Coefficient	.120*	.284**	-.167**	.118*	.144*	.381**	1					
	Sig. (2-tailed)	0.038	0.000	0.004	0.041	0.012	0.000						
	N	301	301	301	301	301	301	301					
DMP	Correlation Coefficient	.288**	-0.103	.373**	.287**	.322**	.130*	0.087	1				
	Sig. (2-tailed)	0.000	0.074	0.000	0.000	0.000	0.024	0.132					
	N	301	301	301	301	301	301	301	301				
BSE	Correlation Coefficient	.354**	-.349**	.606**	0.112	.158**	-.275**	-.294**	.531**	1			
	Sig. (2-tailed)	0.000	0.000	0.000	0.053	0.006	0.000	0.000	0.000				
	N	301	301	301	301	301	301	301	301	301			
TI	Correlation Coefficient	.395**	.236**	.129*	.130*	.372**	.379**	.304**	.194**	0.01	1		
	Sig. (2-tailed)	0.000	0.000	0.025	0.024	0.000	0.000	0.000	0.001	0.869			
	N	301	301	301	301	301	301	301	301	301	301		
PC	Correlation Coefficient	.289**	-.369**	.494**	0.024	0.066	-.278**	-.234**	.321**	.603**	-0.057	1	
	Sig. (2-tailed)	0	0	0	0.684	0.255	0	0	0	0	0.324		
	N	301	301	301	301	301	301	301	301	301	301	301	
PP	Correlation Coefficient	.254**	.115*	.171**	.205**	.347**	.304**	.181**	.352**	-0.072	.451**	-0.063	1

	Sig. (2-tailed)	0	0.047	0.003	0	0	0	0.002	0	0.214	0	0.276		
	N	301	301	301	301	301	301	301	301	301	301	301	301	
PI	Correlation Coefficient	.405**	0	.328**	.180**	.339**	.148*	0.018	.343**	.277**	.221**	.294**	.287**	1
	Sig. (2-tailed)	0	0.994	0	0.002	0	0.01	0.759	0	0	0	0	0	
	N	301	301	301	301	301	301	301	301	301	301	301	301	301
**. Correlation is significant at the 0.01 level (2-tailed).														
*. Correlation is significant at the 0.05 level (2-tailed).														

Key to the matrix: SBE= Satisfying brand experiences; SR = satisfaction recommendations; DBO= destination branding outputs; BG = brand growth; QHR = quality human resources; CA = cultural attractiveness; NA = natural attractiveness; DMP = destination management practices; BSE= brand strategy effectiveness; TI= tourism infrastructure; PC = price competitiveness; PP, politics and policies; PI = propserity and investment

Thus, in summary, it is clear that the effectiveness of destination brand management strategy has large significant relationships with returns to destination branding investments and price competitiveness. Additionally, it was also found out that human resources quality had a large significant relationship with the evidence of satisfied tourists. A number of destination competitiveness factors have medium and significant relationships among themselves.

6.5 SIGNIFICANT PREDICTORS OF DESTINATION COMPETITIVENESS

The study used regression analysis to empirically assess the competitiveness of brand Zimbabwe as a tourism destination. Stepwise regression was employed in the modelling of significant predictors of destination competitiveness in the context of Zimbabwe as a tourism destination. The study used prosperity and investment competitiveness factor as a dependent variable in the regression equation. This factor was used as a dependent variable because, in preceding studies, competitiveness of destinations signified those whose tourism industry contributes significantly towards the prosperity of destination residents. The next section discusses the regression analyses of Model 1.

6.5.1 Destination prosperity and investment competitiveness Model 1

During the first step of regression analyses of Model 1, destination branding outputs, brand growth, satisfaction recommendations, and satisfying brand experiences were entered into the regression equation as the predictors of prosperity and investment competitiveness. Table 6.33 below shows the prosperity and investment competitiveness Model 1 summary. The analyses produced multiple correlation coefficients ($r = 0.486$) and a coefficient of determination ($r^2 = 0.236$). The r of independent variables that were entered into the regression equation of 0.49 indicates that the supply side respondents generally perceive Zimbabwe as a competitive destination, while the r^2 coefficient of 0.236 indicates that approximately 24% of the variation in terms of destination competitiveness was explained by the four independent variables (refer to Table 6.33).

Table 6.33: Regression Model 1 test results for prosperity and investment competitiveness

Model fit	$R^2=0.236$; R =.486, f = 22.892; α = 0.00; df = 4 (regression), 296 (residual)					
	Unstandardised coefficients		Standardised coefficients			
Variable	B	Std. Error	Beta	T	Sig.
(Constant)	-0.379	0.603		-0.628	0.530
Satisfaction recommendations	0.328	0.076	0.248	4.309	**0.000**
Satisfying brand experiences	0.126	0.134	0.052	0.944	0.346
Destination branding outputs	0.438	0.084	0.319	5.216	**0.000**
Brand growth	0.021	0.077	0.015	0.276	0.783

a. Dependent Variable: Prosperity and investment competitiveness

b. Predictors: (Constant), Satisfaction recommendations, satisfying brand experiences, destination branding outputs, brand growth

c. Statistically significant at *p<0.05*

Table 6.33 describes the *f*-scores and shows whether the regression analyses were statistically significant for modelling. The dependent variable for the first stepwise regression for predicting contributors of destination competitiveness was prosperity and investment competitiveness, while the predictors for prosperity and investment competitiveness were the destination branding output returns, brand growth, satisfaction recommendations and satisfying brand experiences. Therefore, the *f*-value explains whether the regression model could have occurred by chance or not. The regression equation was found to be significantly related to prosperity and investment competitiveness (*F = 4,296 = 22.892, p < 0.001*). Consequently, the regression model achieved a satisfactory level in terms of goodness-of-fit in predicting the variance of prosperity and investment competitiveness in relation to the components of destination competitiveness such as destination branding output returns, brand growth, satisfaction recommendations and satisfying brand experiences.

The empirical results in terms of Model 1 of supply regression analyses showed that the satisfaction recommendations by tourists (*p = 0.00; β = 0.248*) are a significant predictor of prosperity and investment competitiveness as this promotes repeat business. In addition, destination branding outputs such as returns to destination

branding investment *(p = 0.00; β = 0.319)* were also found to be a significant predictor to prosperity and investment competitiveness. Based on the beta values, destination branding outputs as measures of returns on destination branding have the highest contribution and weight for the overall destination competitiveness of brand Zimbabwe as a tourism destination (*β = 0.319*). This indicates that an increase in one element of the tourism outputs as returns in destination branding investments, provided other destination competitiveness constructs remain constant, would result in a 0.319 unit increase in overall destination competitiveness of brand Zimbabwe as a tourism destination. Therefore, it must be noted that tourism outputs such as visitor numbers, market share, and tourism receipts, etc. are the most influential contributors to the model.

The brand's growth, as part of the returns of destination branding investment, has been found not to be a significant predictor of prosperity and investment competitiveness as the *p*- value is greater than 0.05. Additionally, it was also found that there is no significant prediction in relation to the satisfying brand experiences to prosperity and investment competitiveness as the *p > 0.05* (c.f. Table 6.33). Figure 6.4 presents a graphic presentation of Model 1 of prosperity and investment competitiveness.
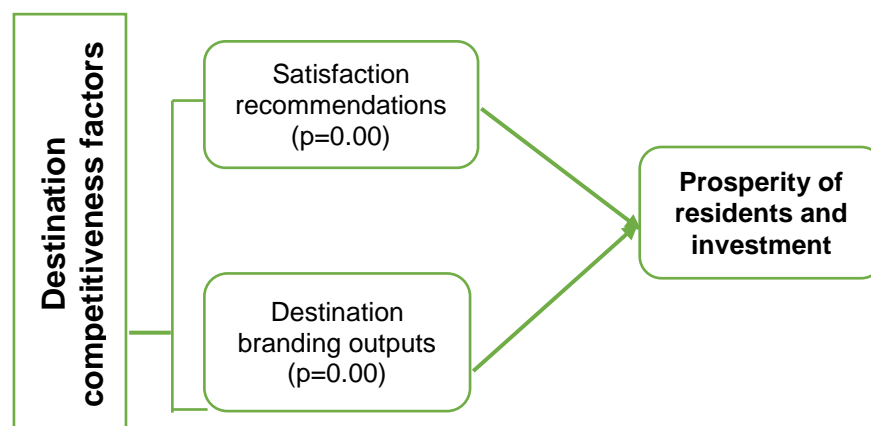

Figure 6.4: Prosperity and investment competitiveness Model 1
Source: Developed by author based on regression results

6.5.2 Destination prosperity and investment competitiveness Model 2

Model 2 of the supply regression analyses entered politics and policies, cultural attractiveness, natural attractiveness, quality human resources, tourism infrastructure,

destination management, price competitiveness and brand strategy effectiveness into the regression analysis equation, with propserity and investment competitiveness as a dependant variable. The following Table 6.34 provides the summary for Model 2.

Table 6.34: Regression Model 2 test results for prosperity and investment competitiveness

Model fit	$R^2=0.292$; R =.541, f = 15.079; α = 0.00; df = 8 (regression), 292 (residual)					
		Unstandardised coefficients		Standardised coefficients		
Variable		**B**	**Std. Error**	**Beta**	**T**	**Sig.**
(Constant)		-2.007	0.681		-2.948	0.003
Quality human resources		0.079	0.076	0.058	1.044	0.297
Cultural attractiveness		0.295	0.137	0.128	2.148	**0.033**
Natural attractiveness		-0.029	0.133	-0.012	-0.218	0.827
Destination management		0.089	0.112	0.055	0.787	0.432
Brand strategy effectiveness		0.220	0.100	0.185	2.201	**0.029**
Tourism infrastructure		0.144	0.109	0.078	1.328	0.185
Price competitiveness		0.445	0.114	0.268	3.898	**0.000**
Politics and policies		0.238	0.080	0.179	2.992	**0.003**

a. Dependent Variable: Prosperity and investment competitiveness

b. Predictors: (Constant), Politics and policies, price competitiveness, natural attractiveness, quality human resources, tourism infrastructure, cultural attractiveness, destination management, brand strategy effectiveness

c. Statistically significant at *p<0.05*

The multiple correlation coefficient of step 2 regression analyses is given by $r = 0.541$ and while the coefficient of determination is shown as $r^2 = 0.292$. The *r* of independent variables that were entered into the regression equation of 0.54 indicates that the supply side respondents generally perceive Zimbabwe as a competitive destination, while the r^2 coefficient of 0.292 indicates that approximately 29.2% of the variation in terms of destination competitiveness by means of prosperity of destination residents and investment was explained by the eight independent variables (c.f. Table 6.34).

F-scores explain and show whether the regression analyses were statistically significant for modelling. Thus, *f*-value explains whether the regression model could have occurred by chance. The dependent variable for the second Model was

prosperity and investment competitiveness while the predictors for prosperity and investment competitiveness were politics and policies, cultural attractiveness, natural attractiveness, quality human resources, tourism infrastructure, destination management, price competitiveness and brand strategy effectiveness. The predictors of prosperity and investment competitiveness were entered into the regression analyses and were found to be significantly related to to the dependent variable ($F = 8, 292 = 15.079, p < 0.001$) (refer to Table 6.34). Therefore, as shown by the empirical results, the regression Model 2 achieved a satisfactory level of goodness-of-fit in terms of predicting the variance of prosperity and investment competitiveness in relation to other predictors that were used to determine the competitiveness of destination Zimbabwe.

Further regression analyses showed that cultural attractiveness is a significant predictor of prosperity and investment competitiveness ($p = 0.03$). In addition to this, the analysis of empirical results based on regression modelling showed that brand strategy effectiveness is a significant predictor of prosperity and investment competitiveness ($p = 0.03$). Price is also a significant contributor of destination prosperity and investment competitiveness as it generated a p-value of 0.00. Politics and policies were also found to be significant predictors of prosperity and investment competitiveness in the context of Zimbabwe as a tourism destination ($p = 0.00$).

The highest contribution comes from price competitiveness ($\beta = 0.268$) indicating that pricing is a key determinant of prosperity and investment competitiveness; and this finding is consistent with the findings of Du Plessis *et al.,* (2015); Du Plessis and Saayman (2017); Dwyer *et al.,* (2000); Gomezelj and Mihalic (2008) and Saayman and Saayman (2008). Thus, it can be noted that pricing is crucial in the determination of Zimbabwe's competitiveness as a tourism destination. Vengesayi (2003:643) argues that, while various studies have sought to explain the effect on tourism demand (for instance, Crouch, 1992), very little has been said on the role of prices on competitiveness of the destination. Thus, against this background, this study points out that prices play a significant role in determining the competitiveness of Zimbabwe as a tourism destination. Prices in Zimbabwe are currently denominated in US dollars, a scenario that makes the country more expensive if the tourists' home country has a weaker exchange rate. The survey also notes that the Zimbabwean government

pursues a hostile tax regime that encourages service providers in the tourism industry to increase prices and make the tourists bear the burden of the hostile tax regime. This could also be the reason why investment in the sector is relatively low. The seasonality of the tourism industry in Zimbabwe also affects the destination's price competitiveness (Vengesayi, 2003:643).

Brand strategy effectiveness *(β = 0.185)*, is a factor that was considered to be new in the tourism literature and in context of Zimbabwean tourism scholarship. The effectiveness of the brand strategy emerged as the second most influential predictor of prosperity and investment competitiveness. Thus, it should be noted that, if Zimbabwe wants to be competitive, the destination's brand management strategy must be effective in terms of attracting tourists that are willing to spend; attract investors that are willing to invest and hire more local people; ensure that tourism outputs such as arrivals, length of stay, market share, and employment growth are rising as this has a multiplier effect on the prosperity of destination residents.

Politics and policies that are pursed by the tourism destination were also found to be the third most influential predictor of Zimbabwe's competitiveness as a tourism destination *(β = 0.179)*. Therefore, for Zimbabwe to achieve competitiveness by means of prosperity and investment there is need for the destination to pursue policies that favours tourism growth. Currently, according to Ndlovu and Heath (2013), Zimbabwe has been inconsistent with its policies and this could further make the destination less competitive. Cultural attractiveness was found to be the least influential in the model *(β = 0.128)*. The significant predictors of prosperity and investment competitiveness of brand Zimbabwe as a tourism destination based on Model 2 are summarised and presented in Figure 6.5.
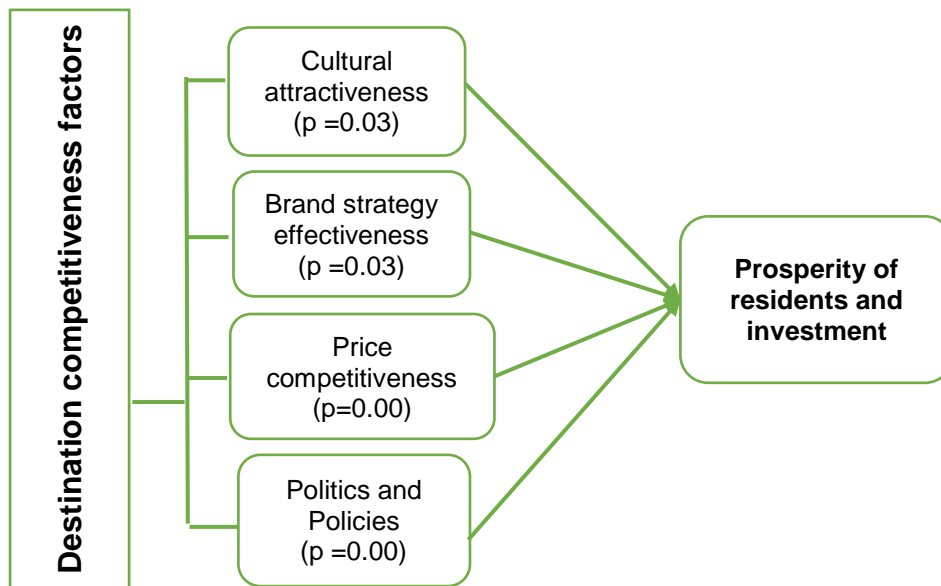
Figure 6.5: Predictors of prosperity and investment competitiveness for Zimbabwe Model 2

Source: Developed by author based on regression analyses of supply

The significant predictors of prosperity and investment competitiveness in an empirical context of Zimbabwe as a tourism destination are summarised in Figure 6.6. 6 factors were found in this study to be significant predictors of the prosperity and investment competitiveness in Zimbabwe. These factors include:

- Satisfaction recommendations ($p = 0.00$);
- Destination branding outputs ($p = 0.00$);
- Cultural attractiveness ($p = 0.03$);
- Brand strategy effectiveness ($p = 0.03$);
- Price competitiveness ($p = 0.00$); and
- Politics and policies ($p = 0.00$).

The highest contributor in terms of predicting the prosperity and competitiveness of brand Zimbabwe as a tourism destination comes from the destination branding output factor *(β = 0.319)*. This is followed by price competitiveness *(β = 0.268)* and satisfaction recommdenations factor *(β = 0.248)*. Politics and policies, though significant, provides the least contribution towards the prosperity and investment competitiveness of Zimbabwe as a tourism destination *(β = 0.179)*.
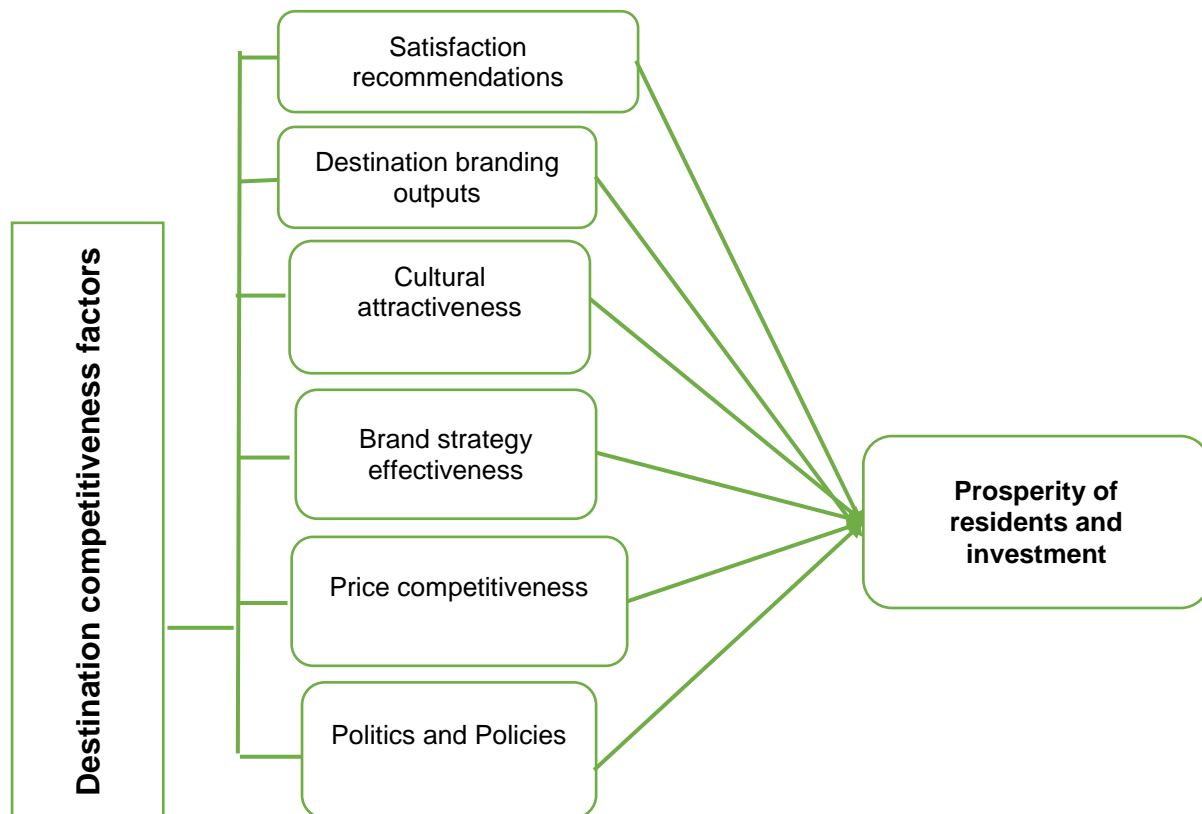
Figure 6.6: A summary of the predictors of prosperity and investment competitiveness for Zimbabwe as a tourism destination

Source: Developed by author based on regression analyses of supply (Model 1 and 2)

Though considered important in the wider tourism literature, human resources quality, natural resources, destination management practices and tourism infrastructure were not significant contributors of prosperity and investment competitiveness in the context of Zimbabwe. This study considered them important contributors of destination competitiveness and will be integrated in the study's framework in Chapter 7. Ritchie and Crouch (2000) acknowledged the improvement of continuing the prosperity of destination residents as one of the core objectives for a competitive destination. It is likewise the conviction of this study that tourism in Zimbabwe must be capable of supporting the long-term economic development of destination residents by means of providing them with significant sources of job opportunities and income, especially considering the long period of economic crisis that Zimbabwe has been in since the land reform programme. In addition to this, the destination must also be able to attract foreign direct investment.

6.6 CONCLUSIONS

This purpose of this chapter was to present the empirical results of supply of the study. This was achieved in five major phases. The first phase dealt with an in-depth analysis of descriptive supply results. Descriptive analysis focused on the organisational profile aspects such as categories of establishments, number of years in operation, length of business operation, number of employees, operations schedule, unique selling points of Zimbabwe and the establishments. Tourism services and accommodation establishments are considered by this study to be the most dominant establishments in Zimbabwe. On average, the organisations have been in business since Zimbabwe gained independence. The tourism sector is no longer as labour-intensive as it used to be. Just as with many destinations, Zimbabwean tourism is seasonal. It is at its peak starting from May to October. The volume of repeat business is low.

The descriptive analysis also showed that Zimbabwe's major unique selling point lies in its natural attractions, cultural attractions, historical attractions, and built attractions. Establishments' unique selling points are found in the product offerings, hospitality, service delivery, and the cuisine. Facebook is the most widely used platform for marketing establishments' product offerings.

Fourteen destination competitiveness factors were identified in this study. The competitiveness factors for Zimbabwe include satisfaction recommendations, satisfying brand experiences, destination branding outputs, brand growth, destination quality, quality human resources, cultural attractiveness, destination management practices, brand strategy effectiveness, price competitiveness, politics and policies and prosperity and investment competitiveness. All the factors were significant for further analyses as shown by the several measures of reliability and validity. However, satisfaction recommendations, destination quality, cultural attractiveness and natural attractiveness are the most important competitiveness factors for Zimbabwe.

The third section of this chapter focused on the One-Way analyses of variances (ANOVAs) with Tukey's post hoc multiple comparisons. The results provided insights into the various relationships and statistical differences of the supply side profile aspects as they apply to destination competitiveness. It was observed that satisfaction recommendations, satisfying brand experiences, cultural resources, branding outputs

and brand strategy effectiveness are significant aspects that influence the overall destination competitiveness of Zimbabwe. Therefore, using these variations could be helpful in enhancing the competitive position of the destination.

The last section of this chapter dealt with the regression of supply factors. Regression analyses showed that cultural attractiveness, brand strategy effectiveness, price and politics and policies factors are significant predictors of the prosperity and investment competitiveness model. While other factors were considered significant in this study, the study observed that destination management practices, destination quality, quality human resources and destination branding investments are important for destination competitiveness modelling and measurement.

The next chapter will discuss the implications of both demand and supply empirical results as well as the recommendations as to how destination competitiveness and attractiveness can be assessed in the future for Zimbabwe as a tourism destination.

CHAPTER 7

CONCLUSIONS AND RECOMMENDATIONS

Finally, in conclusion, let me say just this - Peter Sellers.

7.1 INTRODUCTION

The purpose of this chapter is to make conclusions and recommendations. Conclusions of the study are drawn from chapters 2, 3, 5 and 6. Recommendations of the study are made to help Zimbabwean tourism maximise destination attractiveness and destination competitiveness for sustainable growth of both international and local tourism. Directions for further research on destination competitiveness and destination attractiveness are also made in this chapter.

The goal of this study was to develop a framework that can be used by Zimbabwean tourism and other role players to assess destination competitiveness and attractiveness. Additionally, the framework can also be used in tourism planning, destination planning, marketing and destination brand strategy formulation.

The first objective of the study was to evaluate destination branding as a strategy for building competitive and attractive destination brands. This was achieved in Chapter 2 by means of a comprehensive review of the literature. The objective was achieved by means of providing appropriate academic foundations regarding definitions, origins, applications and classification of destination branding models. The significance of branding in a destination context was also reviewed. The aspects of destination branding were also discussed and the chapter provided a contextual discussion of destination branding in the context of Zimbabwe as a tourism destination.

The second objective of the study was to analyse and examine destination competitiveness and attractiveness from a destination perspective. The objective was also concerned with the development of the measurement items of these aspects. This was done by means of providing appropriate academic foundations regarding the definitions, origins, applications, and classification of models. The aspects of

competitiveness and attractiveness were also discussed in the context of Zimbabwe as a tourism destination. Chapter 3 provided the means of achieving this objective.

The third objective was concerned with examining and discussing the attractiveness and competitiveness of brand Zimbabwe as a tourism destination. This objective was achieved in chapter 5 and chapter 6 of the study. Efforts were made to empirically assess the causal relationships between destination branding and destination attractiveness (demand side) as well as destination competitiveness (supply side). Important attractiveness and competitiveness factors were identified by means of factor analyses. The identified factors were further analysed for significant relationships using Spearman's rank correlations. Other demand side analyses that were conducted include independent t-tests as a way of determining the variation between gender and destination attractiveness factors. ANOVAs were applied in the demand results to identify the key destination attractiveness factors using age, continent of residence, travel group size, frequency of visit and length of stay. With regard to supply data, ANOVAs were used to identify significant competitiveness factors from the lens of the tourism and hospitality establishments in Zimbabwe. Predictors of destination brand loyalty were identified by means of multiple stepwise regression analyses. The same analyses were done to identify the predictors of destination prosperity and investment competitiveness.

The final objective of the study was two-fold: to make conclusions regarding the study and recommendations. The relevance of the proposed framework on destination competitiveness and attractiveness is also discussed as part of the study's recommendations. The competitiveness and attractiveness assessment framework is deemed relevant because it provides tourism managers in Zimbabwe with accurate competitiveness and attractiveness indicators. This knowledge is crucial because it will help destination managers in improving the effectiveness of brand Zimbabwe. These indicators are crucial in influencing and directing policy, particularly destination marketing and branding. The development of a competitiveness and attractiveness assessment framework is, therefore, the major aim of the study. This objective is achieved in Chapter 7 of the study.

7.2 CONCLUSIONS OF THE STUDY

The main goal of this study was to develop a destination competitiveness and attractiveness assessment framework for brand Zimbabwe as a tourism destination. In pursuance of this goal, a number of objectives were formulated. Conclusions of this study are based on the review of literature that was done in Chapter 2 and 3. Further conclusions of this study are drawn from the empirical analysis of data that was done in Chapter 5 and 6.

7.2.1 Conclusions with regard to literature review

This section discusses the conclusions drawn from the two literature review chapters that were conducted in helping this study achieve objectives 1 and 2.

7.2.1.1 Conclusions with regard to Objective 1: to evaluate destination branding as a strategy for building competitive and attractive destination brands.

The following conclusions are made in relation to objective 1 of the study:

- The definition of destination branding is intricate. Blain *et al.* (2005:337) define destination branding as "the set of activities that supports the creation of a name, symbol, logo, word, mark or other graphic that readily identifies and differentiates a destination; that consistently expresses the expectation of a memorable travel experience that is uniquely associated with destination; that serves to consolidate and reinforce the emotional connection between the visitor and the destination; and that reduces consumer costs and perceived risks" all with the intent purpose of creating an image that influences consumers' decisions to visit the destination in question, as opposed to the alternative one (c.f.2.2). A good definition of destination branding integrates demand and supply perspectives.

- Destination branding is not about basic logo development. It involves a set of activities that should support the creation of a name, symbol, logo, word, mark and graphic materials which are able to identify and differentiate a destination.

- Through the review of literature, the study clearly showed that branding is a complex concept, especially in a tourism context.

- The relationship between destination brand and competitiveness and attractiveness in destination contexts has not been sufficiently explored especially in a developmental context.

- The tourism operating environment is turbulent and competitive (c.f.2.1; c.f.2.2.2).
- Destination branding is a strategy focused on building a competitive advantage for tourism destinations, to stimulate brand loyalty among tourists and is a top priority for DMO's globally (c.f.2.1; c.f. 2.2; c.f.2.3).
- Tourism destinations, globally are emphasising points of parity like quality accommodation, good restaurants and well-designed public spaces.
- The objective of destination branding is to stimulate brand loyalty among tourists (c.f.2.1; c.f.2.2.3).
- Tourism destinations must differentiate themselves from the "noises" of competitors in terms of meaning, attachment and quality in order to be successful.
- Differentiation of tourism destinations is a key aspect of destination brand management (c.f.2.1).
- Destination branding reduces consumers' perceived risks (c.f.2.2.2) since they know what to expect and trust in the brand.
- Positive destination brand image influences post-visit behaviour and repeat business (c.f.2.1; c.f.2.2.2; c.f.2.2.3; c.f.2.3.1), thus people will want to visit the destination again.
- Destination brand image is a parameter for forming destination expectations.
- A unique destination brand identity is a crucial element in the development of attractive and competitive destinations (c.f.2.2; c.f.2.2.2).
- Destination branding in a tourism context is significant because:
  - It brings awareness and demands reaction because it persuades tourists of the need to take note of branded tourism destinations;
  - It differentiates tourism destinations from competition (c.f.2.3);
  - It helps tourism destinations to increase market share (c.f.2.3);
  - It creates lasting brand loyalty and strong destination brand values (c.f.2.3);
  - It generates and increases commercial value and profit of the destination brand;
  - It influences intention to travel, destination choice and reduces searching costs;
  - It acts as the basis for coordination of private sector efforts (c.f.2.2.3).

- The complexity of destination branding presents challenges to destination marketers. The key challenges are:
  - Turbulent operating environment (c.f.2.1).
  - The multiplicity of stakeholders within the tourism industry, diverse customer base and unique tourism products (c.f.2.2.2).
  - The complexity of the tourism product (c.f.2.2.3).
  - Tourism is a high involvement industry (c.f.2.2.3).
  - Increased destination substitutability and lack of differentiation (c.f.2.3).
  - The political nature of DMO brand decision-making (c.f.2.3.1).
  - General lack of quality marketing research.
- Negative tourism destination brands are created as a result of socio-political and natural antecedents. Therefore, destination brands are negatively affected by political turmoil and economic meltdown. Based on this, destination brand image is a key priority for DMOs because destinations that enjoy positive images have a higher probability of being chosen (c.f.2.3.1).
- The implications of destination branding for negatively viewed destinations are not sufficiently explored.
- Destination branding is a fairly new area of tourism research (c.f.2.2.2).
- Destination branding is a poorly understood concept by both practitioners and academics (c.f.2.3). More research is therefore recommended to improve the conceptualisation of destination branding.
- Destination branding research in Africa is lacking. The application of destination branding is well articulated in American and European destinations. Limited studies have been done in emerging and tourism destinations such as Zimbabwe (c.f.2.4).
- Studies that link destination branding to competitiveness and attractiveness are limited. As such, universal destination branding models are yet to emerge in literature.
- The need to develop a suitable framework to assess destination competitiveness and attractiveness of brand Zimbabwe as a tourism destination is, therefore, supported.
- Based on literature reviewed and data analysed in this study, the framework consequently proposed that destination attractiveness is dependent on the

destination's significant destination attractiveness factors such as general amenities, external access, brand image, price attractiveness, tourism amenities, destination ambience, destination environment, internal access, destination brand positioning, and attractions (c.f. Figure 7.1).

▪ The development of a framework that is context-specific will, therefore, contribute towards the understanding of the relationship that exists between destination branding and destination competitiveness and attractiveness in the context of Zimbabwean tourism.

It is therefore clear that destination branding plays an important role in differentiating tourism destinations from the competition. Development of unique destination brands is therefore important in influencing visitation and post-visit behaviour.

7.2.2 Conclusions with regard to Objective 2: to analyse competitiveness and attractiveness from a destination perspective

The second objective of the study was two-fold: to review literature on competitiveness and attractiveness in a tourism context. The first section of the conclusions, therefore, focuses on destination competitiveness while the last section of the conclusions, with regard to objective 2, focuses on destination attractiveness.

The conclusions of destination competitiveness are presented as follows:
▪ Ritchie and Crouch (2003:2) define destination competitiveness as "the ability to increase tourism expenditure, to increasingly attract visitors while providing them with satisfying, memorable experiences and to do so in a profitable way while enhancing the well-being of the destination's residents and preserving the natural capital of the destination for future generations" (c.f.3.2.2). There is no universally accepted definition of destination competitiveness. However, the definition by Ritchie and Crouch was considered to be a complete definition for this study (c.f.3.2.2).
▪ The concept of destination competitiveness is therefore a supply side issue.
▪ Competitiveness is extensively discussed in the context of nations (c.f.3.2).

- The concept of competitiveness can also be applied to tourism destinations and tourism businesses considered as the benchmark against which success of tourism destinations is measured (c.f.3.4).
- Generic strategies by Porter are also widely applied in destination competitiveness (c.f.3.3).
- There are numerous approaches for measuring destination competitiveness (c.f.3.4). Widely applied approaches in literature include sustainability, price, destination management, competition, tourism products and expectations, transport environmental management, quality, positioning, governance, challenges and disability (c.f. Table 3.4).
- Based on previous studies and approaches to competitiveness, the approaches employed in this study to determine Zimbabwe's competitiveness are:
  - Price;
  - Environmental management;
  - Quality management;
  - Destination management;
  - Tourism infrastructure;
  - Economic aspects of competitiveness;
  - Satisfaction;
  - Investments in destination branding;
  - Effectiveness of branding strategy; and
  - Politics and policies.
  - These approaches to destination competitiveness were considered appropriate for the study because some of them have been used extensively to measure the same concept. Some of the approaches were more related to a developmental context and, therefore, a combination of these were assessed in the empirical context of Zimbabwe.
  - Investments in destination branding and effectiveness of branding strategy are new approaches that were added as a way of determining the relationship between destination branding with competitiveness in a tourism context.
  - Empirical research that focuses on the relationship between destination branding and destination competitiveness and attractiveness is lacking (c.f.3.2.3).

- Destination marketing alone is not the sole determinant of tourist arrivals in a tourism destination (c.f.3.2.3).
- Price has an effect on the competitiveness of tourism destinations, though empirical research on tourism destinations that uses more than one foreign currency as part of its local basket of currencies is lacking.
- Destination environmental quality is a critical determinant that influences travel decisions (c.f.3.4).
- Research interest on destination competitiveness models is growing and has attracted the interest of scholars in many tourism destinations (c.f.3.5).
- There is a research gap in destination competitiveness research in Africa in general and Zimbabwe in particular. South Africa and Uganda appear to have done some notable studies on destination competitiveness (c.f.3.2.3; 3.4).
- Models that empirically assess the relationship between destination branding and destination competitiveness and attractiveness are lacking.
- Destination competitiveness models are yet to make provision for comprehensively treating all competitiveness variables and elements (c.f.3.4; 3.5.5.).
- There is a lack of standardisation in terms of the aspects that measure competitiveness in a destination context (c.f.3.5.5).
- Destination competitiveness constructs are built upon the destination's comparative and competitive advantages.
- The major limitations of existing destination competitiveness modelling include:
  - excessively cover of too many factors/variables (c.f.3.5.5).
  - lack of standardisation in measuring instruments (c.f.3.5.5).
  - causal link gap between competitiveness variables (c.f.3.5.5).
  - lack of empirical evidence to support models and frameworks (c.f.3.5.5).
  - lack of accuracy (c.f.3.5.5).
  - a majority of models were conceived with large tourism destinations (countries) in mind which makes little sense for smaller, developing countries like Zimbabwe (c.f.3.5.5).
- Competitiveness of tourism destinations can be objectively and subjectively measured (c.f.3.2.3). Integrated studies that measure both subjective and objective measures of destination competitiveness are lacking. Hence the need for the current study to use both objective and subjective measures.

- The most widely used objective measures of destination competitiveness in literature include:
    o Visitor numbers (c.f.3.2.2);
    o Market share growth (c.f.3.2.2);
    o Retaining market share (c.f.3.2.2);
    o Value added products produced by the tourism industry (c.f.3.2.2);
    o Sustainability (c.f.3.2.2);
    o Meet visitor needs (c.f.3.2.2);
    o Deliver goods and services (c.f.3.2.2);
    o Tourist spending (c.f.3.2.2);
    o Employment growth (c.f.3.2.2);
    o Long term profitability (c.f.3.2.2);
    o Length of stay (c.f.3.2.3), though under researched.
- The most widely used subjective measures of destination competitiveness in literature include: richness of culture; well-being of destination residents (c.f.3.2.2); DMO technical efficiency (c.f.3.2.3) and quality of the tourism experience (c.f.3.2.3).
- This study, however, employed both the subjective and objective measures as a way of addressing the literature gap (c.f. chapter 5 & 6).
- Based on previous studies and metrics of competitiveness, the objective measures employed in this study are:
    o Visitor numbers;
    o Market share growth;
    o Retaining market share;
    o Value addition;
    o Delivery of goods and services;
    o Employment growth;
    o GDP growth;
    o Profitability;
    o Foreign direct investment;
    o Length of stay;
    o Return visitors,
    o Visitors' spending;
    o Tourism receipts

- Wi-Fi and Internet connection;
- Based on the previous studies and measurements of competitiveness, the subjective measures employed in this study are:
  - Visitor expectations;
  - Level of service delivery;
  - Visual appeal of destination;
  - Visitor safety;
  - Appeal of culture;
  - Interesting architecture;
  - Quality museums;
  - Unique history;
  - Provision of information.

It is clear that the debate on destination competitiveness is far from being over. Existing limitations on destination competitiveness justify the need of a new competitiveness and attractiveness framework for Zimbabwean tourism. Further research on destination competitiveness modelling is urgent and must offer results that destinations are able to act on and improve their competitiveness. The need for detailed empirical studies is crucial because there is a general lack of universal factors explaining competitiveness in a destination context.

❖ **Destination attractiveness conclusions**

The following section delves into the conclusions that were drawn from the literature that focused on destination attractiveness:

- Destination attractiveness is a multidisciplinary area of study (c.f.3.6). It is a fundamental concept that is needed for DMOs and tourism players to understand destination competitiveness (c.f.3.6). More specifically, destination attractiveness provides a strategic link with regard to destination branding. It acts as a link between the tourist and the tourism destination (c.f.3.6).
- The initial drive that motivates and influences destination choice is the destination's attractiveness (c.f.3.6.1).
- Despite attracting a lot of global academic attention, views on destination attractiveness remain fragmented (c.f.3.6.1).

- Destination attractiveness is not as well researched as destination competitiveness.
- Empirical research that examines the relationship between destination branding and destination attractiveness is lacking.
- The approaches toward the discussion on destination attractiveness are varied. There is no universality with regard to the dimensions that can be used to measure destination attractiveness (c.f.3.6.3.1).
- The following constructs are deemed the most important dimensions of destination attractiveness in a tourism destination:
  - Efficiency in meeting visitor needs (c.f.3.6.1);
  - Recreational opportunities (c.f.3.6.1);
  - Food and accommodation (c.f.3.6.1);
  - Cultural richness (c.f.3.6.1);
  - Natural beauty (c.f.3.6.1);
  - Destination amenities (c.f.3.6.1);
  - Price (c.f.3.6.1);
  - Transport network (c.f.3.6.1);
  - Destination image (c.f.3.6.1).
- Based on the previous studies and measurements of attractiveness, the dimensions employed in this study are:
  - Tourists' motivations;
  - Tourists attractions;
  - Destination's amenities;
  - Accessibility of destination;
  - Ambiance of destination;
  - Destination's environment;
  - Price attractiveness;
  - Brand attractiveness;
  - Destination's brand identity;
  - Destination's brand image; and
  - Destination brand loyalty;
  - Politics and policies.
- The decision was based on the fact that a majority of the dimensions are widely used in literature (c.f. Table 3.5). New dimensions such as brand image, brand

loyalty and brand identity were added in the measurement of destination attractiveness of Zimbabwe as a way of determining the link between destination branding and attractiveness.

- Research on destination attractiveness in Africa and Asia is limited compared to other parts of the world such as North America, and Europe, particularly the UK (c.f.3.6.2).

- Most studies on destination attractiveness used factor analyses, independent *t*-tests, perceptual mapping, and analyses of means, importance performance analysis, and repertory mapping techniques, constant sum and conjoint analysis in analysing and reporting destination attractiveness results (c.f.3.6.1). Fewer attempts have been made to assess both destination attractiveness and destination competitiveness for any specific travel context (c.f.3.6.1).

It is clear that both destination competitiveness and attractiveness are complex aspects of destination research. In addition, there is a dearth of research that addresses the concepts of destination competitiveness and destination attractiveness using demand and supply perspectives. A notable lack of standardisation of the measuring items of both competitiveness and attractiveness in a destination context is quite glaring. More research is required towards the standardisation of the measuring items that can be used in the measurement of the concepts.

Destination attractiveness is a crucial antecedent of destination competitiveness. The knowledge of factors influencing as destination's attractiveness is important in branding and marketing the destination successfully. This study concludes that destination competitiveness is a supply side concept while destination attractiveness is a demand side perspective (c.f. 3.7). Based on this, tourism destination competitiveness and attractiveness, therefore, denotes the ability of brand Zimbabwe as a tourism destination to provide social, physical and economic benefits to the destination's residents and satisfying experiences to the tourists. It is clear that research integrating demand and supply side perspectives in their analyses is lacking. Further research in specific contexts with regard to tourism destination attractiveness and competitiveness has been argued for. As a result, the development of a context-specific competitiveness and attractiveness assessment framework for brand Zimbabwe is supported. This, therefore, explains the significance of this study.

7.2.3 Conclusions with regard to Objective 3: to assess the competitiveness and attractiveness of brand Zimbabwe as a tourism destination

The conclusions with regard to empirical results are dealt with from the demand and supply side perspectives. Therefore, the first sub-section of these conclusions provides the study's conclusions in terms of the results of the demand survey that focused on destination attractiveness of brand Zimbabwe as a tourism destination. The second sub-section, therefore, discusses the conclusions made with respect to the supply survey that focused on destination competitiveness of brand Zimbabwe as a tourism destination.

7.2.3.1 Conclusions regarding the demand survey (destination attractiveness)

This section of the chapter makes the following conclusions regarding the empirical assessment of brand Zimbabwe's attractiveness as a tourism destination:

a. Demographic profile of demand respondents

▪ During the time of the survey, the majority of visitors are female and are married. This finding is different from what the Visitor Exit Survey (VES) of 2016 found (c.f. Table 5.1). Therefore, Zimbabwe is more attractive to women and married tourists. The average age of visitors is 40 years. This is consistent with findings of the VES of 2016 (c.f. Table 5.1).

▪ Africa is the major source market of Zimbabwe due to proximity and ease of visa access amongst African travellers (c.f. Table 5.1). Zimbabwe is less attractive for high numbers of long haul travellers due to external access challenges (c.f. Table 5.1).

▪ The profile of tourists surveyed shows that the majority of visitors to Zimbabwe are educated (c.f. Table 5.1). Educated tourists appreciate the need to travel more than uneducated tourists. The current profile has room for expansion to other countries and markets.

▪ The average income of visitors surveyed is US$1500 per month after tax. Therefore, Zimbabwe's tourist market is not a high income market.

This information is important for destination managers to ensure that they are able to deliver tourism experiences that are commensurate with the profile of the market they attract.

b. Travel behaviour of demand respondents

- Zimbabwe is an attractive destination as indicated by the high percentage of first time visitors that were recorded in the survey. However, this study concludes that Zimbabwean tourism has weak brand loyalty. Destination marketing efforts that are carried out in promoting Zimbabwe are, therefore, an expensive exercise due to lack of repeat visitation.

- The average cost of tour packages is US$4 500. Zimbabwe is, therefore, a relatively expensive destination that is difficult to access. This also explains why there is low repeat visitation loyalty and occupancies.

- The average cost of accommodation is relatively higher when compared with peers in Southern Africa (US$263). This discourages longer stays and repeat visitation.

- Zimbabwe has fewer motoring tourists despite the cost of travelling by road being cheaper than flying. The heavy police presence and roadblocks every ten kilometres explain why there are fewer motoring tourists. This, therefore, directly influences the visitor's length of stay, hotel occupancies, and tourism revenue. The police road blocks in Zimbabwe also deter tourists from considering visiting Zimbabwe in the future. This challenge also affects the destination brand image and is likely to erode the equity of *Zimbabwe: A World of Wonders*. The motoring tourists could also have been reduced by the poor state of roads that linking major tourism attractions that were sampled for this study.

- Major competition for Zimbabwe comes from Southern Africa. Therefore, to remain attractive, Zimbabwe must benchmark its pricing and other incentives with its peers.

- Word of mouth messages (WOM) are the most effective medium for marketing Zimbabwe. Zimbabwe has been reported as being a violent country by international media houses. Therefore, visitors are more comfortable with WOM messages than with what is being sold using other platforms, such as TVs and radios. The reconfiguration of the country's destination marketing messages is required.

- The average length of stay is 2 nights per visit (c.f. Table 5.2). Therefore, Zimbabwe is a secondary tourism destination as tourists are visiting Zimbabwe as

a transit destination or because their itinerary includes a day trip to Victoria Falls. There is a trend towards shorter holidays in Zimbabwe. The implications of shorter holidays include reduced hotel occupancies and revenue. This could be explained by the high prices that are charged in Zimbabwe for tourism activities and services. This reduces the attractiveness and competitiveness of Zimbabwe when compared with regional peers.

c. Travel motives

The majority of respondents of the demand survey agreed or strongly agreed that they travel to Zimbabwe to enjoy the beautiful scenery, sightseeing tourism attractions and to visit a place they have never visited before. Other significant travel motives to Zimbabwe were noted as the need to appreciate natural resources such as the Victoria Falls, and the need to participate in new things (c.f. 5.2.1.1.d). Destination marketing and branding messages must, therefore, focus on these motivations.

d. Identification of destination attractiveness factors

- The objective of the study also included identifying the key destination attractiveness of Zimbabwe. Destination attractiveness factors were identified using separate factor analyses, as indicated in Chapter 5. Twelve destination attractiveness factors were identified (c.f. 5.4.1). These factors were labelled: destination attractions, general amenities, tourism amenities, external access, internal access, destination ambience, destination environment, price attractiveness, destination brand positioning, destination brand identity, destination brand image and destination brand loyalty (c.f. 5.4.1).

- The most important attractiveness factors of brand Zimbabwe include: destination ambiance (factor 6) with the highest mean of 3.93; destination attractions (factor 1) with a mean score of 3.74 and tourism amenities (factor 3) with a mean score of 3.72. Tourists, therefore, value these attributes and this could influence the attractiveness of Zimbabwe if the country invests more into these factors. Respondents considered Zimbabwe's ambience as the most important factor. This is an indication that Zimbabwe is an attractive destination with unique ambience.

- Adding the element of story-telling and documentaries could also help Zimbabwe to optimise its attractiveness using destination ambience elements. Destination marketing efforts must express the distinctiveness of the Zimbabwean ambience

rather than concentrating marketing promotions on specific tourism attractions such as the Victoria Falls, and Great Zimbabwe and so on.

▪ Destination attractions are important for Zimbabwe's attractiveness as a destination. Therefore, in order to continuously enhance the attractiveness of Zimbabwe as a destination, more attention must be given to the sustainable development of the attractions. Issues of carrying capacity must also be addressed if Zimbabwe is to remain attractive. More so, the development of other attractions such as annual festivals is crucial. Zimbabwe must, therefore, emphasise its marketing messages on features that are unique.

▪ Price attractiveness (factor 8) has the lowest mean score of 2.45. This is the lowest contributing factor towards Zimbabwe's attractiveness as the mean value is below 3. Zimbabwe has price attractiveness challenges as tourists perceive it to be more expensive when compared to South Africa. This could be attributable to the use of the US dollar as part of its currency basket, which on most occasions is expensive when tourists are from emerging economies such as South Africa, Namibia and so on.

▪ Factor 4, which was labelled external access, is another factor that has a lower mean score of 2.60. Respondents indicated that it was not easy to access the destination since there were no direct flights available from their home country to Zimbabwe. Efforts must be made by Zimbabwe to ensure that it has direct flights linking its source markets and major attractions.

e. Aspects influencing destination attractiveness

The study makes the following conclusions regarding aspects of destination attractiveness:

❖ Correlations between attractiveness factors

The study used Spearman's rank order correlations to examine the linear strengths of the relationship between destination attractiveness factors. The following conclusions were made:

▪ Destination brand identity and destination brand positioning positively influence each other.

- There is a direct positive correlation between general amenities and tourism amenities. This implies that when Zimbabwe improves its general amenities, tourism amenities will also improve.

- Destination brand positioning influences the destination brand image of Zimbabwe.

- Internal access can only be improved when Zimbabwe invests more in general amenities such as exchange facilities and communication facilities.

- Destination ambience influences destination brand image. An increase in destination ambience helps Zimbabwe's image to improve (c.f. Table 5.22). This is an interesting relationship that must be improved as destination ambience was found to be a critical factor of destination attractiveness. Zimbabwe could actually improve its tattered image through selling its destination ambience.

❖ **The influence of socio-demographic characteristics on destination attractiveness**

  ❖ **Gender:**

It is interesting to note that there was no variation with regard to aspects influencing destination attractiveness when compared with the gender of the respondents. However, the most important destination attractiveness factors based on the mean scores for women were: destination ambience ($\overline{x}$ = 3.93; SD = 0.47); tourism amenities ($\overline{x}$ = 3.93; SD = 0.47); and destination brand image ($\overline{x}$ = 3.72; SD = 0.76). The most important destination attractiveness aspects for male respondents were destination ambience ($\overline{x}$ = 3.92; SD = 0.45); destination attractions ($\overline{x}$ = 3.77; SD = 0.47) and tourism amenities ($\overline{x}$ = 3.71; SD = 0.42).

  ❖ **Source markets and destination attractiveness:**

- Respondents from Australia perceived brand Zimbabwe's general amenities as more attractive than respondents from other continents such as Asia, North, America, Africa, Europe and South America. This could be attributed to the fact that Europe and North America are believed to have better general amenities than what is available in Zimbabwe.

- South Americans considered brand Zimbabwe's destination ambience more attractive than respondents from other continents. This could be attributable to the fact that Zimbabwe as an Afican destination provides tourists with a different

atmosphere as compared to other tourism destinations in South America, North America and Europe for example.

- Australians perceived brand Zimbabwe's destination brand image to be a more important destination attractiveness factor. Therefore, it can be concluded that brand Zimbabwe's brand strategy is effective among Australian visitors.

- Africans, Australians and Asians considered external access an important destination attractiveness factor. The finding of external accessibility in the context of Africa is attributed to proximity of the tourists to Zimbabwe as the majority can drive to Zimbabwe. Asia's positive rating of external access is attributed to the fact that Zimbabwe, after its worsening relationships with the UK and USA, shifted its focus to the East.

❖ **Age and destination attractiveness:**

- All age groups perceive that price is a crucial aspect of a destination's competitiveness.

❖ **Qualification and destination attractiveness:**

- Educated tourists have better perceptions with regard to tourism amenities, destination environment and destination ambiance. Therefore, it is important for Zimbabwe as a tourism destination to bear in mind that the tourists are continuously becoming more sophisticated. This is crucial in ensuring that the destination's tourism amenities, the destination environment and ambiance are appealing.

- The perceptions that tourists have on destination environment as a destination attractiveness factor means that Zimbabwe as a tourism destination must ensure that its tourism focuses more on sustanaibility aspects, as this improves the destination's choice potential among educated and special tourists.

- The study also concludes that uneducated tourists also have better perceptions with regards to external access and destination ambiance. Therefore, based on this, it is important for Zimbabwe as a tourism destination to ensure that aspects of external access are improved even for tourists with no school.

❖ **Qualification and destination attractiveness:**

▪ Repeat tourists have better appreciation of the attractiveness of Zimbabwe as a tourism destination in terms of its attractions, external access, and destination environment destination brand positioning and brand image.

▪ Repeat visitors have better perceptions than tourists who are visiting for the first time and in the empirical context of Zimbabwe, those who visited more than 5 time, perceive brand Zimbabwe's tourism amenities to be more attractive. The more one visits a destination, the more they appreciate the tourism amenities.

f. Predictors of destination brand loyalty

As part of statistical modelling for this study, stepwise regression analyses were used for estimating the relationship among destination attractiveness variables. Destination brand loyalty was used as a dependent variable in the regression equation. The first step of regression analyses entered destination brand image, destination brand identity, destination environment, price and destination brand positioning as predictors of destination brand loyalty.

The following conclusions were made regarding the Model 1 of regression analyses:

▪ Destination environment is a significant predictor of destination brand loyalty (c.f.5.5.1). Tourists are becoming more environmentally conscious and Zimbabwe must ensure that it sustainably manages its environment as a way of building loyalty.

▪ Destination brand identity is a predictor of destination brand loyalty (c.f.5.5.1).

▪ Destination brand image is a predictor of destination brand loyalty (c.f.5.5.1).

▪ Destination brand image has the highest contribution and heaviest weight for tourists' overall destination brand loyalty to brand Zimbabwe as a tourism destination ($\beta = 0.413$). This indicates the need for destination marketers to develop branding strategies that are aimed at continuously projecting a positive destination brand to its source markets.

▪ Interestingly, despite being a key aspect of attractiveness for younger tourists, price did not predict loyalty. Price as a predictor of destination brand loyalty revealed a negative beta value ($\beta = -0.074$). Therefore, this study concludes that high prices in Zimbabwe negatively influence destination brand loyalty.

- The negative relationship between pricing and loyalty confirms that Zimbabwe is an expensive tourism destination. Therefore, it is not an attractive destination in terms of its pricing strategy. However, literature maintains that price is an important aspect of destination attractiveness.

Model 2, based on the regression analyses, entered the following into the regression equation as predictors of destination brand loyalty: ambiance, internal accessibility, external accessibility, attractions, tourism amenities and general amenities. The following conclusions with regard to Model 2 of demand regression analyses were made:

- Destination ambiance is a significant contributor of destination brand loyalty (c.f.5.2.10). Interestingly, attractions, amenities and access, though found to be important attractiveness factors in Zimbabwe, do not predict brand loyalty.

7.2.3.2 Conclusions regarding the supply survey (destination competitiveness)

a. Categories of tourism and hospitality establishments

- The accommodation/hospitality, transport operators, food and beverage and attractions based establishments dominate the tourism industry in Zimbabwe (c.f.6.2.1).
- A majority of establishments have been in operation for a period of more than 40 years. This implies that the tourism industry in Zimbabwe could be more mature.
- The industry is no longer as labour intensive as it was a few years back due to the current economic challenges being faced by the destination. This could also be explained by low repeat visitation and shorter length of stay.
- The unique selling points of the establishments include activities, service delivery and hospitality. Continuous improvement in these unique selling points is important for enhancing destination competitiveness and positive word of mouth recommendations.
- Facebook is the most widely used marketing medium in Zimbabwe. The majority of supply side organisations manage their own Facebook pages. This is important given that Zimbabwe's tourist market for this survey was largely made up of younger travellers who are always on social media platforms. Its usage is,

therefore, encouraged. More research on using social media as a destination marketing tool is also encouraged in the context of Zimbabwe.

b. Unique selling points of Zimbabwe

The unique selling points of Zimbabwe as a tourism destination brand are:

- Natural attractions such as the majestic Victoria Falls, mighty Zambezi river, and unspoiled wilderness;

- Cultural attractions inclusive of the UNESCO listed world heritage sites such as Great Zimbabwe, Khami Ruins, Matopos and so on; and

- Built attractions such as the Lake Kariba, Great Zimbabwe ruins and so on.

Therefore, destination marketing and branding messages must focus on these unique selling points as they help to clearly differentiate Zimbabwe from competition. The addition of destination ambience as a key unique selling point is also crucial.

c. Identification of destination competitiveness factors

- 14 destination competitiveness factors were identified using separate factor analyses as indicated in Chapter 6 of this study. Based on these factor analyses, 14 factors labelled as: satisfaction recommendations, satisfying brand experiences, destination brand outputs, brand growth, destination quality, quality human resources, cultural attractiveness, natural attractiveness, destination management, brand strategy effectiveness, tourism infrastructure, price competitiveness, politics and policies, and prosperity and investment.

- Factor 1, satisfaction recommendations, is the most important aspect of destination competitiveness in Zimbabwe with an importance means score of 4.24. Given the negative press Zimbabwe has received since the year 2000, this factor is crucial as it generates the much needed positive word of mouth. This also explains why demand tourists said they knew Zimbabwe through WOM messages.

- Destination quality (factor 5) is also an important factor of destination competiveness in the empirical context of Zimbabwe. It yielded a mean of importance score of 4.11. Cultural attractiveness (factor 7), though identified in literature as a subjective element of destination competitiveness, is an important factor in Zimbabwe. It has a mean score of 4.03.

- Continuous improvement in destination quality and cultural attractiveness is important for Zimbabwe to generate more satisfaction recommendations and increased visitorship.

- The majority of destination competitiveness factors revealed higher mean scores above 3.0, except factor 3 on destination branding outputs ($\bar{x}$ = 2.50). This means that the destination branding investments in Zimbabwe did not translate into an increase in visitor numbers, length of stay, market share etc. as per the expectations of the supply side.

- Brand strategy effectiveness ($\bar{x}$=2.47) (factor 10) also showed that Zimbabwe's destination management programmes such as brand ambassadors were ineffective in positioning Zimbabwe as a competitive tourism destination.

- Factor 12 that focused on prosperity and investment, also generated a low mean score ($\bar{x}$ = 2.38). For the period under review, the contribution of Zimbabwean tourism towards the prosperity of residents is, therefore, on the decline as it is now hiring less labour than it used to. Foreign direct investment in the tourism industry is also affected by inconsistent laws and regulations. The lack of protection of private property that was shown during the land reform exercise of 2000 could also explain why there is little foreign direct investment in the tourism sector.

- The price competitiveness factor yielded the lowest means ($\bar{x}$ =1.94). This study concludes that brand Zimbabwe is an expensive tourism destination. The country's pricing has negative repercussions on the destination's competitiveness. An expensive destination deters visitation, length of stay and overall affects the destination's market share and tourism income.

d. Aspects influencing destination competitiveness

❖ Correlations between destination competitiveness factors

The study concludes that large significant correlations exist between: brand strategy effectiveness and destination branding outputs; price competitiveness and brand strategy effectiveness; and quality human resources and satisfying brand experiences.

- Brand strategy effectiveness and destination branding outputs. As the destination's brand strategy becomes more effective, the destination's branding outputs will increase as well as its competitiveness.

- Price competitiveness and brand strategy effectiveness. Price competitiveness is directly linked to brand strategy effectiveness. Zimbabwe's brand strategy will only be effective in meeting its destination branding objectives when its price is competitive when compared to competition.

- Quality human resources and satisfying brand experiences. It can be concluded that, quality human resources influence satisfying brand experiences. The role of human resources cannot be underestimated.

❖ **The influence of establishment characteristics on destination competitiveness**

This study concludes that tourism and hospitality establishments perceive Zimbabwe as a competitive destination brand. Thus, based on the significant factors that were obtained, the following conclusions are made:

- Overall, the attractions based establishments consider Zimbabwe to be a competitive tourism destination more than other establishments. This could be attributable to the fact that main attractions for tourists, such as Great Zimbabwe and Victoria Falls are of a high standard and in their individual capacity, they compare and compete well with other attractions globally.

- Accommodation establishments also consider Zimbabwe to be a competitive tourism destination. Visitors know what to expect from the accommodation sector because there are international franchises in Zimbabwe.

- The attractions based establishments consider Zimbabwe to be a competitive tourism destination in terms of satisfying brand experiences when compared to other establishments such as food and beverage, MICE related, and transport, for example. The explanation that could be given on this is that attractions and activities constitute the primary motivations of why tourists visit tourism destinations. Most tourists surveyed indicated that they visit Zimbabwe for sightseeing tourism attractions (c.f. Table 5.6). Therefore, as long as tourists continue to visit attractions, and leave comments, either in a book or on social

media, attractions based establishments will continue to believe that Zimbabwe is a competitive destination.

Tourism and hospitality establishments in Zimbabwe expect significant destination brand returns from the national branding efforts of the destination. Therefore, this study concludes that returns on destination branding are a key indicator of destination competitiveness in the empirical context of Zimbabwe. An effective destination brand strategy is critical for developing a competitive destination brand in the empirical context of Zimbabwean tourism.

❖ **Predictors of destination prosperity and investment**

As part of statistical modelling for this study, multiple stepwise regression analyses were used for estimating the relationship among destination competitiveness variables. Prosperity and investment was used as a dependent variable in the regression analyses. The first step of regression analyses entered destination branding outputs; satisfaction recommendations, satisfying brand experiences, and brand growth were entered into the regression equation as predictors of destination prosperity and investment competitiveness. The following conclusions were made regarding the Model 1 of regression analyses:

- Satisfaction recommendations are an important predictor of destination prosperity and investment competitiveness (c.f. Table 6.33). This implies that when satisfaction recommendations increase, more visitors are likely to come to Zimbabwe and this generates more business. With increased level of business, investment in infrastructure and tourism amenities also grows. This will eventually translate into employment opportunities.

- Destination branding outputs such as increased visitor numbers, tourist spending, length of stay etc. are significant contributors of destination prosperity and investment competitiveness (c.f. Table 6.33). Prosperity of destination residents, through employment opportunities, for example, is only realised through growth in destination branding outputs. Efforts must, therefore, be made to increase tourism arrivals, length of stay etc. As output grows, more facilities will be required, thus further creating opportunities for residents to prosper.

- In the empirical context of Zimbabwean tourism, destination branding outputs such as visitor numbers, tourist spending, length of stay as measures of returns on

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destination branding investments have the highest contribution and heaviest weight for tourism organisations' overall destination prosperity and investment competitiveness of brand Zimbabwe as a tourism destination ($\beta = 0.319$);

- Satisfying brand experiences and brand growth, though identified as important destination competitiveness factors in Zimbabwe, do not contribute to prosperity and investment. However, it is worth stating that it is these satisfying brand experiences and brand growth factors that generate repeat business and increase tourism growth via the multiplier concept.

Model 2 of the regression analyses was a result of regressing politics and policies, cultural attractiveness, natural attractiveness, quality human resources, tourism infrastructure, destination management, price competitiveness, and brand strategy effectiveness as predictors of destination prosperity and investment competitiveness. The following conclusions with regard to Model 2 of supply side regression analyses are made:

- Cultural attractiveness is a significant predictor of destination prosperity and investment competitiveness in Zimbabwe (c.f. Table 6.34). Further investment in cultural attractions is crucial in predicting prosperity and further investment in the tourism industry in Zimbabwe. This is crucial given that cultural tourism is becoming an important segment of the tourism industry. Therefore, in anticipation of such a growth in cultural tourism, more investment is required.

- Brand strategy effectiveness is a key element in predicting destination prosperity and investment competitiveness (c.f. Table 6.34). Without an effective destination management strategy, it is impossible for Zimbabwe to ensure prosperity of destination residents and investment growth. Efforts must be made to come up with destination branding strategies that address both supply and demand issues as is suggested by the framework in Figure 7.1.

- Price is a significant predictor of destination prosperity and investment competitiveness (c.f. Table 6.34). This finding is consistent with literature. However, Zimbabwe needs to adjust its pricing model and be more competitive and attractive.

- Politics and policies are significant predictors of destination prosperity and investment competitiveness (c.f. Table 6.34). This finding is primarily important for destination managers given that a lot of Zimbabwe's tourism challenges emanated

from political problems such as land reforms, contested elections and inconsistent policies. The development of consistent policies is crucial for a successful tourism industry in Zimbabwe. The politicians in Zimbabwe must also be tamed to reflect branding efforts in Zimbabwe.

- It is interesting to note that despite being found in this study and in literature as an important destination attractiveness factor, tourism infrastructure does not significantly contribute towards prosperity and investment competitiveness. However, this study concludes that it is an important factor in destination competitiveness.

7.3   Proposed guidelines of competitiveness and attractiveness framework

The purpose of this portion of the chapter is to outline and explain the study's proposed destination competitiveness and attractiveness assessment framework for brand Zimbabwe as a tourism destination. The destination competitiveness and attractiveness assessment framework is informed from both the demand and supply perspectives. Therefore, its implementation especially for destination marketing and branding purposes has to be approached from the dual perspective. The framework was developed based on key results of the study. Significant factors were identified using *p*-values, while important factors used in the framework were based on the mean of importance scores. The proposed guidelines of the framework presented in Figure 7.1 are outlined below:

❖ Destination attractiveness assessment of Zimbabwe

The determination of destination attractiveness factors using specific market demand is crucial for the framework. Determining the demand factors is principally essential as the behaviour and motivations of tourists are continuously changing. Knowledge of these factors will help the destination in designing destination and marketing strategies. Additionally, the demand factors will also help Zimbabwe as a tourism destination to segment its markets based on the outcomes of the motivations and other tourist behaviours. Empirical findings based on ANOVAs and descriptive statistics showed that the sociodemographics and the tripographics of the tourists to Zimbabwe are heterogeneous. The heterogeneity of the Zimbabwean international tourist market also showed that the tourists' reasons for visiting Zimbabwe are varied.

Zimbabwe is mostly visited by people with an average age of 40 years whose primary motivation is to enjoy the beautiful scenery. The marketing messages of Zimbabwe, therefore, should be based on the primary tourist motivations. Based on age, price attractiveness is what is wanted in Zimbabwe. As a result, Zimbabwean tourism must ensure that its prices give tourists value for money, particularly young travellers. This will help Zimbabwe in optimising its attractiveness as a tourism destination.

Results showed significant variation on destination attractiveness in terms of continent of residence. The efforts for Zimbabwe must be based on improving general amenities, external access, destination brand image and the destination's ambience. These are the significant factors when one analyses the source markets for Zimbabwe. Efforts for building image must be intensified because they increase the loyalty of Zimbabwe's source markets. The focus of branding and marketing messages must also be built upon these factors.

Based on the level of education, the framework suggests that efforts must focus on tourism amenities, external access, destination environment, and destination ambience. These are the factors that currently influence Zimbabwe's attractiveness as a destination for tourists, based on their level of education. Destination environment is one of the significant factors that predicts destination brand loyalty. There is need for conservation and sustainability aspects to be included in the destination management practices of Zimbabwe as a way of building loyal tourist markets.

Using tripographics such as frequency of visits to Zimbabwe and the travel group size, it is important to note that tourists are interested in the destination's brand positioning, suggesting that the tagline, *Zimbabwe: A World of Wonders* is an attractive position that needs to be enhanced by improving internal access for the travelling tourists. It must be easier for the tourists to explore the wonders in Zimbabwe. Additionally, more focus must be directed towards new tourism products and development as travel group size attractions, positioning and destination.

The demand survey shows that destination ambience, destination's brand image, external access, internal access, general and tourism amenities, destination environment, destination attractions and price were considered to be significant

aspects of destination attractiveness. Loyalty of tourists in the empirical context of Zimbabwe is predicted by destination environment, destination image and brand identity. These tourists' perceptions, together with their key motivations must, therefore, form the basis of Zimbabwe's destination marketing and branding efforts.

The determination of destination attractiveness factors must be done on a continuous basis. Conducting continuous research on destination attractiveness also helps in determining relevant marketing strategies for different market audiences. Continuous destination attractiveness assessment and/or research is critical in that it enhances knowledge on visitor management. This knowledge is critical in increasing Zimbabwe's chances of coming up with innovative ways of promoting brand Zimbabwe. Visitor management knowledge will also help Zimbabwe in developing new tourism products like festivals, events and other attractions. Tourism innovation will increase brand Zimbabwe's attractiveness as a tourism destination and will help the destination to stimulate new demand.
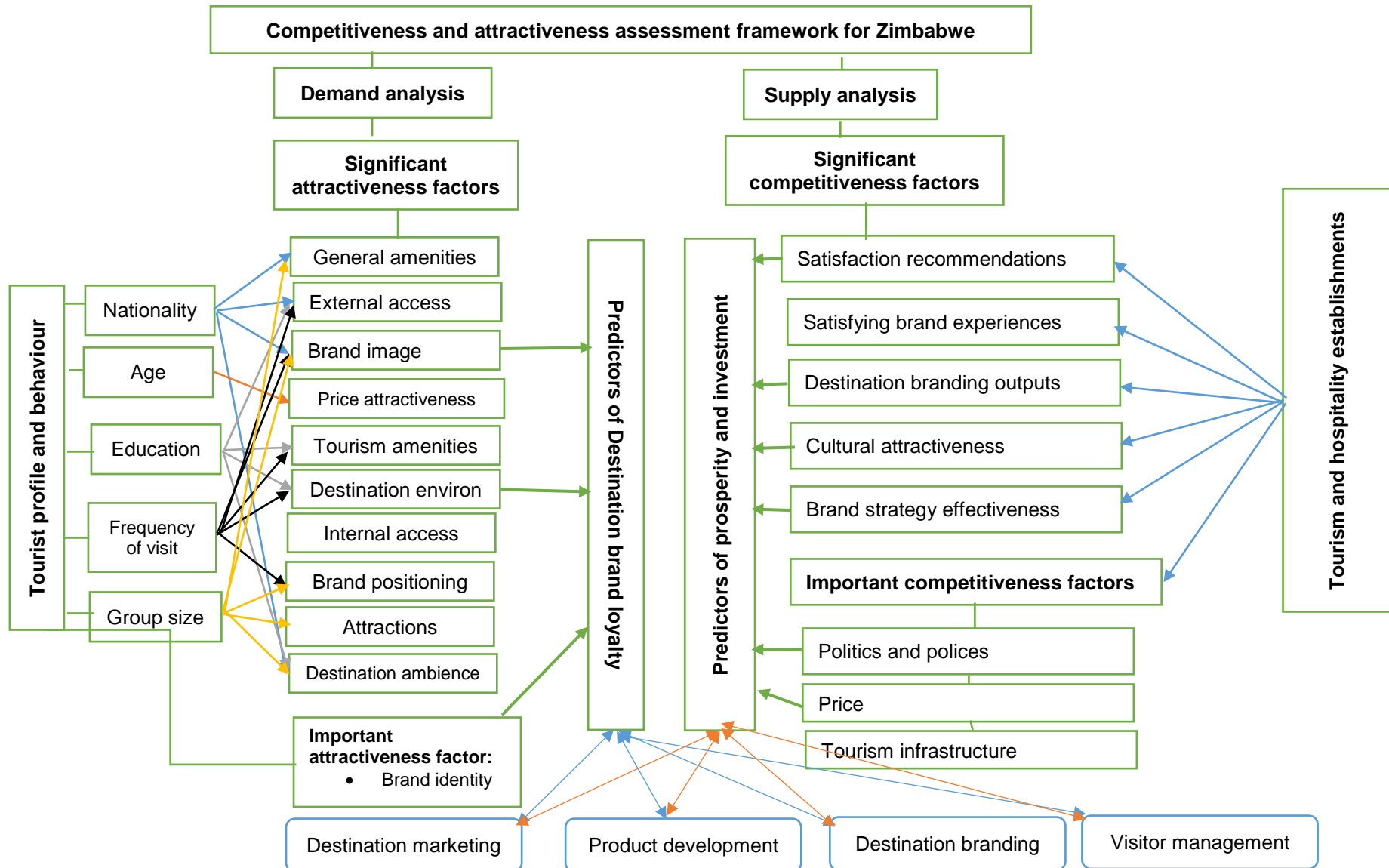
Figure 7.1: Proposed destination competiveness and attractiveness assessment framework
Source: Developed by author based on results

❖ **Destination competitiveness assessment of brand Zimbabwe**

In terms of operationalisation of the proposed framework, destination competitiveness must be assessed after the destination attractiveness factors have been determined. Destination attractiveness is a key aspect of destination competitiveness. The assessment of competitiveness factors after attractiveness factors will help Zimbabwe as a tourism destination to determine if it is competitive enough to supply tourism products and services to tourists as determined in the attractiveness assessment.

The operating environment for most tourism destinations is turbulent. Competition for tourists is increasing among tourism destinations. Therefore, the strategic importance of building both attractive and competitive destination brands is crucial. The framework proposes that the assessment of destination competitiveness for Zimbabwe must be linked to the destination's marketing, visitor motivations, general destination management practices and destination branding. Stakeholder engagement in these aspects is also crucial in building and sustaining a competitive and attractive brand for Zimbabwean tourism.

Continuous destination competitiveness assessment/research is a key input of this framework as it informs the destination about the key significant and important competitiveness factors. These factors can change over time, hence the need for continuous assessment. A number of significant factors were identified in this study, such as satisfaction recommendations, satisfying brand experiences, destination branding outputs, cultural attractiveness and the effectiveness of the brand strategy of the destination. It is also important to note that politics and policies are crucial in Zimbabwe if it is to remain competitive. Zimbabwe has been known for being inconsistent with its laws and regulations and this has been cited from a supplier perspective as a deterrent of competitiveness. Price aspects are also important in enhancing Zimbabwe's competitiveness. Currently, tourism suppliers believe that Zimbabwe is an expensive destination (a similar belief shared with the demand side). The same factor is a predictor of destination prosperity and investment competitiveness and this means that for Zimbabwean tourism to grow and contribute meaningfully towards the country's GDP, it has to address its pricing aspects.

Development of tourism infrastructure is identified as an important competitiveness factor for Zimbabwe. Infrastructure and suprastructure facilities are important in enhancing Zimbabwe's competitiveness as a tourism destination. More interpretation centres, educational facilities, maintenance of tarred roads, Wi-Fi and Internet connectivity etc. are important for Zimbabwe's competitiveness. Another important aspect that could help Zimbabwe optimise its competitiveness, though not included in the framework, is the continuous availability of quality human resources. Therefore, efforts must be focused on developing skills and competencies of tourism staff. The set of skills crucial in building Zimbabwe as a competitive destination brand include, though is not limited to, customer service, friendliness, and hospitality etc.

❖ **Destination management in Zimbabwe**

Destination management practices such as destination marketing, product development, and destination branding and visitor management must be informed by the outcomes of the destination's demand and supply factors, as well as the attractiveness and competitiveness factors. This will help the destination marketers to develop and sell a brand that is unique and capable of meeting the needs of the tourists.

❖ **Measuring destination branding outputs of brand Zimbabwe**

The outputs of destination branding must be assessed using both the objective and subjective outputs of destination competitiveness and attractiveness. This kind of review must be done at least every five years, given that competitiveness and attractiveness factors are always changing due to the dynamic nature of the tourism market. The proposed framework when implemented, Zimbabwe is likely to be able to building and market a sustainable, attractive and competitive brand that will generate the following destination branding outputs as presented in Table 7.1.

Table 7.1: Destination branding outputs

Objective outputs	Subjective Outputs
1. Longer length of stay	1. Positive brand image
2. Higher tourist spending	2. Improved quality of life for residents
3. Higher hotel occupancies	3. Improved trust in destination

4. Higher tourism arrivals	4. Better perception management
5. High contribution to GDP	5. Brand loyalty
6. Employment growth	
7. Value added products	
8. Market share growth	
9. Improved competitiveness rankings	

Source: Developed by author based on literature reviewed and empirical results

The destination branding outputs listed in Table 7.1 can only be achieved if Zimbabwe as a destination is able to manage its destination attractiveness and competitiveness factors. The destination must also take into consideration that attractiveness is a precursor to destination competitiveness. Destination attractiveness factors and demand factors have a significant influence on the supply factors of Zimbabwe. Destination marketing and branding must, therefore, act as a bridge that brings tourists to the destination. When implementing this framework, it is crucial for Zimbabwe Tourism Authority and parties concerned to find ways that would enhance tourist satisfaction when visiting the destination. Therefore, effective visitor management is crucial in selling Zimbabwe as an attractive and competitive destination brand. The focus of destination branding must not only be based on what Zimbabwe has to offer, but it must be integrated with what the tourists are seeking. A balanced approach is recommended if the framework is to produce desired results.

7.4 CONTRIBUTIONS OF THE STUDY

The contribution of this study is three-fold as discussed below:

7.4.1 Literature contribution

- This study contributes towards destination management planning literature, which is generally lacking in the context of Zimbabwe. According to Mkono (2012:207), there is a remarkable lack of studies that focus tourism planning in Zimbabwe.
- The major contribution of the study is the competitiveness and attractiveness assessment framework that was developed (c.f. Figure 7.1). The framework is useful in destination planning and contributes towards tourism planning literature in Zimbabwe.

- Empirical studies that have attempted to examine the link between destination branding and competitiveness as well as attractiveness are limited (Miličević *et al.*, 2017:209). Therefore, the contribution of this study is that it investigated the relationship and, therefore, narrowed this literature gap.

- Studies on the concept of destination competitiveness and attractiveness have been done predominantly from demand or supply side approaches (Zehrer *al.*, 2017:55). The contribution of this study is, therefore, that it is one of the few studies that have assessed the concept of destination competitiveness and attractiveness from the demand and supply side perspectives.

- The other contribution of this study is that it is one of the few studies that have assessed destination competitiveness using both objective and subjective measures. According to Zehrer *et al.,* (2017:55) destination competitiveness has been predominantly assessed using subjective measurements, suggesting that objective measurements of destination competitiveness are rare. Therefore, the study contributes to the literature on how destinations can be assessed using both subjective and objective competitiveness measuring items.

- The guidelines of the competitiveness and attractiveness assessment framework are another important contribution of the study. The guidelines help destination managers on how to assess complex concepts of attractiveness and competitiveness.

- Exploratory analyses of factors such as the satisfaction recommendations, satisfying brand experiences, destination branding outputs and brand strategy effectiveness were explored as new factors that will be integrated into the destination competitiveness debate. These factors could also form the basis of further investigation with regard to the relationship between destination branding and competitiveness.

- The study also contributes to the literature on destination attractiveness in Africa in that it identified the destination attractiveness factors for Zimbabwe. The last formal study on destination attractiveness in Africa was done in 1979 (Reitsamer *et al.* 20160). New factors of destination attractiveness such as destination brand positioning, destination brand identity, and destination brand loyalty are also an important contribution to literature as they also help to explain the link between destination branding with destination attractiveness.

- This study also contributes new dimensions on how to assess destination attractiveness in a tourism context. The approaches towards the discussion on destination attractiveness are varied. There is no universality with regard to the dimensions that can be used to measure destination attractiveness.

- The price competitiveness factor has been explored in destination competitiveness literature and it was established that it was never done in a destination that uses other nations' currencies as part of its local currencies. Therefore, this study explored the price factor in a multi-currency destination environment for the first time in tourism research.

- The geographical allotment of destination branding research, destination competitiveness and attractiveness shows that Europe and North America seem to be leading the research agenda on this domain. According to literature, limited / no studies in Africa in general and Zimbabwe in particular have directly examined the effects of destination branding on competitiveness and attractiveness. Thus, through this research, the tourism discipline now has new literature on how to trace and examine the performance of a destination brand over time in as much as people in the general marketing sciences are able to trace and evaluate the performance of the product brands.

- The study also contributes to literature on the link between destination branding and competitiveness, as well as attractiveness through the new relationships that were identified, such as brand identity being a critical element that influences destination brand positioning; destination brand positioning influencing destination brand image; and destination ambience influencing destination brand image etc.

- New predictors of destination brand loyalty were identified in this study as destination environment, destination ambience, and destination brand identity and destination brand image. These factors help in explaining the relationship between destination branding and destination attractiveness. Therefore, the study contributes towards destination loyalty and attractiveness literature.

- This study also contributes to the destination competitiveness literature by means of new predictors of destination prosperity and investment that were identified in this study. The predictors of destination prosperity and investment are satisfaction recommendations, destination branding outputs, cultural attractiveness, brand strategy effectiveness, price and politics and policies. The contribution of the study through these predictors is that this study is among one of the few studies that has

examined the relationship between destination branding and competitiveness in a tourism context.

7.4.2 Methodological contribution

The study employed a demand and supply perspective in its methodology to assess the competitiveness and attractiveness of brand Zimbabwe as a tourism destination. The methodology was unique in terms of the following:

- The destination competitiveness and attractiveness literature shows that measuring instruments are not standardised. In a number of cases, researchers used different variables/dimensions to measure the same concept. There were no destination competitiveness and attractiveness specific measuring instruments that could be found for smaller countries and tourism destinations like Zimbabwe. As a result, the researcher had to develop the measuring instruments. The survey elements and variables were derived from the literature on destination branding, destination competitiveness and destination attractiveness with some of the items self-generated by the researcher. The survey instruments were tested. The reliability and the validity of the items were confirmed. The instruments that were used in this study can further be used in assessing the competitiveness and attractiveness of other tourist destinations that share similar characteristics with Zimbabwe.

- Subjective measures of destination competitiveness have dominated research mostly from either demand or supply side (Zehrer *et al.,* 2017:55). Objective measures of destination competitiveness appear to be uncommon and assessments of both subjective and objective measures have been ignored so far (Zehrer *et al.,* 2017). To enrich the reliability of preceding research, this study used both measures in its methodological approach.

- Studies that focused on the assessment of competitiveness and attractiveness in a destination context using both the demand and supply perspectives are lacking. Therefore, the methodological contribution of this study is that it used both perspectives to guide the survey.

- The other key methodological input of this study was in terms of the causal relationships that have been examined between the different elements of destination branding and destination attractiveness as well as destination branding

and destination competitiveness. Unlike previous studies that have only partially examined possible relationships between destination branding and destination competitiveness and attractiveness, this particular study explored the possible relationships between destination branding and destination attractiveness as well as the possible relationships between destination branding and destination competitiveness. These findings can therefore assist DMOs in managing destination brands for competitiveness and attractiveness.

7.4.3 Practical contributions

- The proposed framework serves as a tool for destination planning, destination marketing as well as destination brand strategy formulation.

- The proposed framework serves as a means through which Zimbabwe as a tourism destination can measure the effects of destination branding in relation to destination competitiveness and attractiveness. Zimbabwe, through this framework, will be able to provide satisfying brand tourism experiences that are being sought by its tourist markets (customers).

- The framework provides insights on how Zimbabwe as a destination can use destination branding to develop competitive advantage based on strategic destination management and visitor management practices.

- Consequently, the proposed framework provides a destination competitiveness and attractiveness template from which Zimbabwe, as a tourism destination, is able to track destination performance over a period of time. This will be a crucial step for Zimbabwe to determine whether the destination brand is growing in attractiveness and competitiveness.

- Destination marketing and branding messages must focus on Zimbabwe's unique selling points as they help to clearly differentiate the destination from competition. Unique selling points that can be used in developing destination marketing and branding messages include natural attractions such as Victoria Falls, Zambezi the UNESCO World Heritage Sites must also be used in destination marketing and branding.

7.5 RECOMMENDATIONS OF THE STUDY

The following recommendations have been made, based on the findings and conclusions of this study:

7.5.1 Practical recommendations for demand

- Zimbabwe Tourism Authority and the tourism industry must design tourism policies aimed at promoting longer length of stay. This could be achieved through commercial price policies, off-season discounts or marketing campaigns aimed at attracting tourist segments whose longer length of stay guarantees higher earnings.

- Destination branding and marketing messages must focus on the key tourist motivations as identified in this study such as sightseeing tourism attractions.

- Hotel and transport services pricing must be cheaper or at least pegged in line with competitors in the Southern African region. This will help in increasing tourism numbers.

- The tourism industry in Zimbabwe must also run off-season specials as is the case in competitor destinations like Namibia for example. This stimulates tourism numbers.

- In an attempt to build destination brand loyalty, Zimbabwe must promote the use of rewards and loyalty points. This could be achieved by means of introducing loyalty cards that will be issued to international customers. In doing so, the tourism industry will benefit in terms of loyalty, repeat business, intention to recommend and a positive brand image.

- The Hotels and tour operators, for example, may work together to develop follow-up actions by sharing information. This could be useful in stimulating repeat visitation.

- Police presence on the highways must be reduced to encourage motoring tourists to visit Zimbabwe.

7.5.2 Practical recommendations for supply

- Invest in road infrastructure and enhance accessibility of attractions. Additionally, there is a need to reduce the heavy police presence on the highways in Zimbabwe as it has a direct impact on the length of stay and visitor motivations.

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- Liaise with the national airlines and other airlines coming to Zimbabwe to have direct flights from source markets to Zimbabwe's main attractions such as Victoria Falls, Great Zimbabwe, Kariba and the Eastern Highlands, as this increases external access of the destination.

- Internal flights are also recommended given the high police presence on the highway which delays tourists.

- A more flexible visa regime is advocated for improving brand Zimbabwe's competitiveness. It can also be broadened to include online visa applications or provisions of visas at ports of entry to tourists from the destination's key market sources.

- The government must lower its value added tax that it imposes on tourism players on top of the tourism levy because this has a direct relationship with price. The current tax regime only makes Zimbabwe expensive, less attractive and less competitive.

- This study recommends a sustainable pricing framework for brand Zimbabwe's lodging and tourism services. The tourism industry in Zimbabwe must also reduce the entrance fees to its attractions such as the Victoria Falls (which costs US$30 per entry) to reasonable prices, or at least make the USD$30 valid for a minimum of 2 consecutive days.

- The destination must develop innovative tourism products based on identified tourist motivations such as cultural festivals, as is the case with neighbouring South Africa. These new products will also help Zimbabwe in dealing with the seasonality problem.

- Invest in ICT infrastructure as a way of enhancing destination competitiveness in respect of Wi-Fi and Internet connectivity. ICT is an important element of tourism competitiveness given the impacts it has on holiday planning and vacation needs of tourists.

7.5.3 Recommendations for future research

- The information used in this analysis was compiled using Victoria Falls, Great Zimbabwe, Eastern Highlands and Harare as tourist destinations in Zimbabwe. To generalise some of the conclusions that were reached, data must be analysed for other tourist destinations across the country.

- It is recommended that future research must develop suitable measures of competitiveness and attractiveness to evaluate the comparative significance and importance of the different factors that influence the destination competitiveness and attractiveness of Zimbabwe.

- Future research can also centre on the assessment of the comparative importance of destination competitiveness and attractiveness by assessing competitiveness and attractiveness of Zimbabwe, in particular tourist market segments.

- Zimbabwe's destination attributes, tourist tastes, decision-making processes that influence destination choice for niche markets must also be investigated. This will help Zimbabwe improve the competitiveness and attractiveness of the destination's proposition by means of matching and exceeding the expectations of special interest groups.

- The measuring instruments used in this study had so many variables despite having reliability coefficients above 0.5. It is recommended that future researchers must optimise the number of variables for effective modelling of destination competitiveness and attractiveness.

- The measuring instruments on destination competitiveness and attractiveness for future research in the Zimbabwean context must be translated to other languages such as French, Polish, Portuguese, Chinese etc. to cater for non-English tourists, thereby making the sample representative for effective generalisations.

- Future research must also focus on the reasons why brand Zimbabwe has short lengths of stay as well as the reasons why tourists avoid Zimbabwe as a tourism destination.

- Future research must also be conducted every five years to determine the competitiveness and attractiveness factors that are crucial in shaping destination branding and marketing messages. Longitudinal studies that evaluate Zimbabwe's competitiveness and attractiveness over a lengthier period of time may be more edifying to tourism operators in defining operational and structural elements that are affecting the destination's competitiveness and attractiveness.

APPENDIX 1: EMPIRICAL SURVEY INSTRUMENT FOR DEMAND

AN ASSESSMENT OF BRAND ZIMBABWE'S COMPETITIVENESS AND ATTRACTIVENESS AS A TOURISM DESTINATION

EMPIRICAL RESEARCH SURVEY INSTRUMENT

A DEMAND SIDE PERSPECTIVE

Information collected in this study will be treated in confidence. Indicate your answers in the space provided.

SECTION A: DEMOGRAPHIC INFORMATION

1   **Gender?**

Female	1
Male	2

2   **In what year were you born?**   **19**_____ _

3   **Country of residence?**

_____

4   **Highest level of education?**

No School	1
Non-degree	2

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Diploma/degree	3
Post-graduate	4
Other, Specify	5

5　**Indicate your after tax income level per month**

6　**Marital status?**

SECTION B: TRAVEL BEHAVIOUR

1　**Including this visit, how many times have you visited Zimbabwe?**

First time	1
2-3 times	2
4-5 times	3
More than 5 times	4

2　**How many people are in your travel group (including yourself)?**

Number of people

3　**How many nights do you stay in Zimbabwe for this trip?**

Number of nights

Estimate how much you have spent on the following items

4 **during your visit to Zimbabwe**

Airplane tickets	$
Accommodation	$
Activities	$
Souvenirs	$
Other transport and travel costs	$
Retail shopping (excl. food and drink)	$
Food and drink	$
Other, specify	$

5 **If you could not visit Zimbabwe which other two destinations will you choose?**

Destination 1: _____

Destination 2: _____

6 **Where did you hear about Zimbabwe as a tourism destination?**

Traditional media (radio, magazines, television, newspapers)	1
Word-of-mouth messages	2
Online media (facebook, twitter, website etc)	3
Brochures and pamphlets	4
Trade shows	5

Other: (Specify)

_____

_____

| | 6 |

7 **Rate the reasons for visiting Zimbabwe. Mark your preferred choice and please complete each question.**

I travelled to Zimbabwe:	Totally disagree	Disagree	Not sure	Agre e	Totally agree
1. to relax physically	1	2	3	4	5
2. to relax spiritually	1	2	3	4	5
3. to participate in new activities	1	2	3	4	5
4. to find thrills and excitement	1	2	3	4	5
5. to sightsee tourism attractions	1	2	3	4	5
6. to appreciate natural resources	1	2	3	4	5
7. to meet new people	1	2	3	4	5
8. to interact with unknown local residents	1	2	3	4	5
9. to visit friends and relatives	1	2	3	4	5
10. to live or stay temporarily with local communities	1	2	3	4	5
11. to increase my social status	1	2	3	4	5
12. to visit a destination that would impress my friends and family	1	2	3	4	5
13. to satisfy the desire to be somewhere else	1	2	3	4	5
14. to fulfil my dream of visiting a foreign country	1	2	3	4	5
15. to have an enjoyable time with my travel companion (s)	1	2	3	4	5
16. to be away from home	1	2	3	4	5
17. to seek solitude in a foreign land	1	2	3	4	5
18. to learn something new and interesting	1	2	3	4	5
19. to visit a place that I have not visited before	1	2	3	4	5
20. to enjoy the good physical amenities (accommodation, transport & recreation facilities)	1	2	3	4	5

21. to visit historical and cultural attractions	**1**	**2**	**3**	**4**	**5**
22. to enjoy the local cuisine	**1**	**2**	**3**	**4**	**5**
23. to enjoy the beautiful scenery	**1**	**2**	**3**	**4**	**5**
24. because it is a safe destination	**1**	**2**	**3**	**4**	**5**
25. because it is easy to access as a tourism destination	**1**	**2**	**3**	**4**	**5**
26. it is part of my lifestyle	**1**	**2**	**3**	**4**	**5**
27. the country represents a genuine African experience	**1**	**2**	**3**	**4**	**5**

SECTION C: ATTRACTIVENESS OF ZIMBABWE

To what extent do you agree with the following statements regarding Zimbabwe? Mark your preferred choice

.	**Zimbabwe is attractive because:**	**Strong Disagree**	**Disagree**	**Not Sure**	**Agree**	**Strongly agree**
1.1	the destination has unique natural attractions	**1**	**2**	**3**	**4**	**5**
1.2	the destination has unique built attractions	**1**	**2**	**3**	**4**	**5**
1.3	the archaeological cultural attractions are excellent	**1**	**2**	**3**	**4**	**5**
1.4	the historical cultural attractions are excellent	**1**	**2**	**3**	**4**	**5**
1.5	the cultural festivals are unique	**1**	**2**	**3**	**4**	**5**
1.6	the destination has unique handicrafts/souvenirs	**1**	**2**	**3**	**4**	**5**
1.7	the way of life of local people is unique	**1**	**2**	**3**	**4**	**5**
1.8	the level of hospitality and friendliness of the local people is excellent	**1**	**2**	**3**	**4**	**5**
1.9	the language of the local people is unique	**1**	**2**	**3**	**4**	**5**
1.10	the destination has unique icons	**1**	**2**	**3**	**4**	**5**
1.11	the destination has many opportunities for social interactions with others	**1**	**2**	**3**	**4**	**5**

2.	**Evaluate the attractiveness of Zimbabwe in terms of the following destination amenities:**	**Strong Disagree**	**Disagree**	**Not Sure**	**Agree**	**Strongly agree**
2.1	the destination offers quality facilities	**1**	**2**	**3**	**4**	**5**
2.2	the destination's tourism infrastructure - roads, airports,communication is excellent	**1**	**2**	**3**	**4**	**5**
2.3	tourism support services for example foreign language interpretation, laundrettes, postal and banking are excellent	**1**	**2**	**3**	**4**	**5**
2.4	the general services levels are excellent	**1**	**2**	**3**	**4**	**5**
2.5	accommodation at the destination is excellent	**1**	**2**	**3**	**4**	**5**
2.6	the cuisine of Zimbabwe is excellent	**1**	**2**	**3**	**4**	**5**
2.7	the entertainment - night clubs, jazz and music performances are excellent	**1**	**2**	**3**	**4**	**5**
2.8	the retail outlets - shopping malls and centres, travel agents, etc. are excellent	**1**	**2**	**3**	**4**	**5**
2.9	sports and activities offered are excellent	**1**	**2**	**3**	**4**	**5**
2.10	the image of Zimbabwe is tourism friendly	**1**	**2**	**3**	**4**	**5**
2.11	the marketing of the destination is excellent	**1**	**2**	**3**	**4**	**5**
2.12	the exchange rate is favourable	**1**	**2**	**3**	**4**	**5**
2.13	the transport at the destination is excellent	**1**	**2**	**3**	**4**	**5**
2.14	the communication at the destination is excellent	**1**	**2**	**3**	**4**	**5**
3.	**Zimbabwe is an accessible destination because:**	**Strongly Disagree**	**Disagree**	**Not Sure**	**Agree**	**Strongly agree**
3.1	the destination has good infrastructure in terms of airports, roads, railways and ports	**1**	**2**	**3**	**4**	**5**
3.2	it is easy to access the destination from my country of origin	**1**	**2**	**3**	**4**	**5**
3.3	the destination's airport route is available from my home country	**1**	**2**	**3**	**4**	**5**
3.4	the frequency of transportation (both air and road) to Zimbabwe makes it very accessible	**1**	**2**	**3**	**4**	**5**
3.5	the prices charged for transport and tourism services are reasonable	**1**	**2**	**3**	**4**	**5**

3.6	the destination offers a variety of public transport vehicles	1	2	3	4	5
3.7	Zimbabwe is an innovative tourist destination	1	2	3	4	5
3.8	Zimbabwe has state of the art technology	1	2	3	4	5
3.9	the destination has visa policies that are tourism friendly	1	2	3	4	5
3.10	making reservations is easy	1	2	3	4	5
3.11	there is a wide access to tourist information	1	2	3	4	5
3.12	the drive time to Zimbabwe from my home country is short	1	2	3	4	5
3.13	there is easy access to wifi/internet	1	2	3	4	5
3.14	the drive time between attractions is short	1	2	3	4	5
4.	**Evaluate the attractiveness of Zimbabwe in terms of ambience:**	**Strong Disagree**	**Disagree**	**Not Sure**	**Agree**	**Strongly agree**
4.1	the destination is vibrant	1	2	3	4	5
4.2	the destination's residents are friendly	1	2	3	4	5
4.3	the history and folklore of the destination is interesting	1	2	3	4	5
4.4	tourist services and amenities are delivered with courtesy	1	2	3	4	5
4.5	Zimbabwe offers a true African experience	1	2	3	4	5
4.6	the destination offers high levels of service delivery	1	2	3	4	5
5.	**Evaluate Zimbabwe's destination environment:**	**Strong Disagree**	**Disagree**	**Not Sure**	**Agree**	**Strongly agree**
5.1	the destination is safe and secure for tourists	1	2	3	4	5
5.2	the destination is committed to ensure safety of tourists	1	2	3	4	5
5.3	the destination has the ability to respond to the changing needs of the visitors	1	2	3	4	5
5.4	tourists have easy access to Wi-Fi and Internet services	1	2	3	4	5
5.5	tourism providers in Zimbabwe work together to offer improved products to tourists	1	2	3	4	5
5.6	Zimbabwe looks after its environment	1	2	3	4	5
5.7	the level of sanitation and hygiene at the destination is very high	1	2	3	4	5
6.	**Evaluate the attractiveness of Zimbabwe in terms of price:**	**Strong Disagree**	**Disagree**	**Not Sure**	**Agree**	**Strongly agree**

6.1	the prices of tourism services in Zimbabwe are competitive	1	2	3	4	5
6.2	the price of airport amenities (for instance parking fees and restaurants) are competitive	1	2	3	4	5
6.3	the tax policies on tourist services (including Value Added Tax) are tourist friendly	1	2	3	4	5
6.4	the use of multi-currency in Zimbabwe reduces travel vacation costs	1	2	3	4	5
6.5	the destination offers value for money	1	2	3	4	5
6.6	Zimbabwe has a price advantage when compared to other destinations I have visited	1	2	3	4	5
7.	**Evaluate the attractiveness of Zimbabwe's destination brand:**	**Strong Disagree**	**Disagree**	**Not Sure**	**Agree**	**Strongly agree**
7.1	the destination's brand name (***Zimbabwe: A World of Wonders)***is attractive	1	2	3	4	5
7.2	the destination's logo is attractive and enticing (***see the top corner of the first page)***	1	2	3	4	5
7.3	the brand is associated with quality and good experience	1	2	3	4	5
7.4	Zimbabwe's value proposition captures my interest, hence the visit to the destination	1	2	3	4	5
7.5	the destination serves the needs of the visitors	1	2	3	4	5
8.	**Evaluate Zimbabwe's destination brand identity:**	**Strong Disagree**	**Disagree**	**Not Sure**	**Agree**	**Strongly agree**
8.1	the destination's brand positioning, ***A world of Wonders,*** is attractive and appealing	1	2	3	4	5
8.2	I perceive Zimbabwe as an attractive destination brand	1	2	3	4	5
8.3	the destination's positioning statement (***A World of Wonders)*** matches what I have experienced as a tourist	1	2	3	4	5
8.4	I have visited the destination because of its brand awareness programmes		2	3	4	5
8.5	the destination's brand identity is suitable for its target audiences	1	2	3	4	5
9.	**Evaluate Zimbabwe's destination brand image:**	**Strong Disagree**	**Disagree**	**Not Sure**	**Agree**	**Strongly agree**

		Strong Disagree	Disagree	Not Sure	Agree	Strongly agree
9.1	my visit to Zimbabwe was influenced by the image of the destination	1	2	3	4	5
9.2	my post-visit behaviour is likely to be influenced by the destination's brand image	1	2	3	4	5
9.3	the brand image influenced my choice of visiting Zimbabwe among competing destinations	1	2	3	4	5
10.	**I will show my loyalty to the Zimbabwean brand through:**	Strong Disagree	Disagree	Not Sure	Agree	Strongly agree
10.1	I intend to revisit Zimbabwe in the near future	1	2	3	4	5
10.2	I will speak good about Zimbabwe to my friends and family	1	2	3	4	5
10.3	I will recommend my friends to visit Zimbabwe	1	2	3	4	5

ANY COMMENTS OR SUGGESTIONS

APPENDIX 2: EMPIRICAL SURVEY FOR SUPPLY

NORTH-WEST UNIVERSITY
YUNIBESITI YA BOKONE-BOPHIRIMA
NOORDWES-UNIVERSITEIT
POTCHEFSTROOM CAMPUS

Zimbabwe
A World of Wonders

AN ASSESSMENT OF BRAND ZIMBABWE'S COMPETITIVENESS AS A TOURISM DESTINATION

EMPIRICAL RESEARCH SURVEY INSTRUMENT

A SUPPLY SIDE PERSPECTIVE

Information collected in this study will be treated in confidence

SECTION A: ORGANISATIONAL INFORMATION

1. **Which of the following tourism and hospitality categories best describes the nature of your business's operations?**

Hotel Accommodation	1
Tour Operator	2
Destination Marketing organisation	3
National Tourism Organisation	4
Heritage and Monuments	5
Events Operator	6
Tourism Services	7
Transport Operator	8
Other (please specify)	9

2. **For how many years have your establishment been in business?**

_____ **Years**

3. **How many employees are in your establishment?**

Permanent	
Temporary	

4. **Rate, how busy is your business on a scale of 1 to 10 (1=least busy and 10=extremely busy)**

January	
February	
March	
April	
May	
June	
July	
August	
September	
October	

	November	
	December	

5. **What percentage of your visitors is repeat visitors?** | **%** |

6. **What are the unique selling point of….**

Zimbabwe | |

this establishment | |

7. **Which marketing mediums (for example Radio or Facebook) are used to market this establishment?**

SECTION B: COMPETITIVENESS OF ZIMBABWE

To what extent do you agree with the following statements regarding Zimbabwe? Mark your preferred choice

1	Zimbabwe is competitive because:	Strongly disagree	Disagree	Not sure	Agree	Strongly Agree
1.1	it is cheaper than other African tourism destinations	1	2	3	4	5
1.2	it offers unique products	1	2	3	4	5
1.3	Zimbabwe has world class icons	1	2	3	4	5
1.4	tourists are very satisfied	1	2	3	4	5
1.5	the return on investments in the tourism industry is very high	1	2	3	4	5
1.6	destination quality guarantees tourism satisfaction	1	2	3	4	5
1.7	of effective human resources	1	2	3	4	5
1.8	the attractions are of competitive quality	1	2	3	4	5
1.9	the general infrastructure is among the best in Africa	1	2	3	4	5
1.10	it has good tourism facilities	1	2	3	4	5
1.11	the destination offers value for money	1	2	3	4	5
1.12	the destination is well managed	1	2	3	4	5
1.13	the business environment supports tourism as an industry	1	2	3	4	5
2	Evaluate the levels of satisfaction with tourism in Zimbabwe:	Strongly disagree	Disagree	Not sure	Agree	Strongly Agree
2.1	the destination brand delivers what was promised	1	2	3	4	5
2.2	the destination brand offers value for money	1	2	3	4	5
2.3	the destination brand use healthy business ethics	1	2	3	4	5
2.4	on-line comments shows high levels of satisfaction by tourists	1	2	3	4	5
2.5	Zimbabwe receives a high number of return visitors	1	2	3	4	5
2.6	the destination enjoys a positive word-of-mouth referrals	1	2	3	4	5
2.7	post-visit comments about Zimbabwe are positive	1	2	3	4	5

		Strongly disagree	Disagree	Not sure	Agree	Strongly Agree
2.8	tourists are satisfied with the attractiveness of the destination	1	2	3	4	5
3	**Evaluate the return on destination branding investment:**	**Strongly disagree**	**Disagree**	**Not sure**	**Agree**	**Strongly Agree**
3.1	the rebranding of Zimbabwe, from Africa's Paradise to A World of Wonders has led to an increase in visitor numbers	1	2	3	4	5
3.2	government expenditure towards the tourism industry is good	1	2	3	4	5
3.3	spending by tourists from target markets is very high	1	2	3	4	5
3.4	international competitiveness rankings have moved up since rebranding in 2011	1	2	3	4	5
3.5	tourists trust the new brand: *Zimbabwe: A World of Wonders*	1	2	3	4	5
3.6	the new brand led to growth in market share	1	2	3	4	5
3.7	spending made in terms of marketing Zimbabwe corresponds with visitor spending	1	2	3	4	5
3.8	tourists visiting the destination stay longer and spend more than before rebranding	1	2	3	4	5
3.9	events and festivals are effective for tourism growth	1	2	3	4	5
3.10	more and more people are employed in the tourism industry	1	2	3	4	5
4	**Evaluate destination quality of Zimbabwe:**	**Strongly disagree**	**Disagree**	**Not sure**	**Agree**	**Strongly Agree**
4.1	Zimbabwe offers quality ground and airport infrastructure	1	2	3	4	5
4.2	the human resources within the tourism industry are effective	1	2	3	4	5
4.3	tourist receipts are an indication of destination quality	1	2	3	4	5
4.4	destination enjoys good Wi-Fi and internet connectivity	1	2	3	4	5
5	**Evaluate the human resources quality in the tourism industry:**	**Strongly disagree**	**Disagree**	**Not sure**	**Agree**	**Strongly Agree**
5.1	the quality of educational system in Zimbabwe contributes to tourism competitiveness	1	2	3	4	5
5.2	there is high local availability of specialised research and training within the tourism industry	1	2	3	4	5
5.3	destination competitiveness depends on the extent of tourism staff training	1	2	3	4	5
5.4	Zimbabwe has qualified tourism and hospitality staff	1	2	3	4	5
5.5	Zimbabwean tourism employers prefer to hire foreign labour	1	2	3	4	5
6	**Evaluate the attractiveness of Zimbabwe:**	**Strongly disagree**	**Disagree**	**Not sure**	**Agree**	**Strongly Agree**
6.1	visitors feels safe in Zimbabwe	1	2	3	4	5

		Strongly disagree	Disagree	Not sure	Agree	Strongly Agree
6.2	unique local cuisine appeals to the international tourism market	1	2	3	4	5
6.3	destination is visually appealing	1	2	3	4	5
6.4	destination has well known destination landmarks and icons	1	2	3	4	5
6.5	destination's nightlife appeals to the international tourism market	1	2	3	4	5
6.6	destination's different cultures has a strong international appeal	1	2	3	4	5
6.7	special events and festivals like the Carnival, Harare International Festival of the Arts, etc. have strong international appeal	1	2	3	4	5
6.8	destination has interesting architecture	1	2	3	4	5
6.9	destination has good climate and weather	1	2	3	4	5
6.10	destination has unique history	1	2	3	4	5
6.11	quality museums and monuments	1	2	3	4	5
7	**Evaluate Zimbabwe's destination management practices:**	**Strongly disagree**	**Disagree**	**Not sure**	**Agree**	**Strongly Agree**
7.1	there is high stakeholder accountability	1	2	3	4	5
7.2	private sector's support towards the tourism industry is good	1	2	3	4	5
7.3	the community's support towards sustainable tourism is good	1	2	3	4	5
7.4	there is effective coordination and alliances of key operators in the tourism industry	1	2	3	4	5
7.5	there is a good provision of tourism information	1	2	3	4	5
7.6	Zimbabwe Tourism Authority is effective in monitoring and evaluating the performance of the tourism industry	1	2	3	4	5
7.7	Zimbabwe Tourism Authority conducts periodic and systematic marketing and destination branding research	1	2	3	4	5
7.8	the tourism industry is innovative; always producing new products	1	2	3	4	5
7.9	there is high level of commitment towards the development of a favourable destination image by concerned players	1	2	3	4	5
8	**Zimbabwe's new destination brand management strategy is effective because:**	**Strongly disagree**	**Disagree**	**Not sure**	**Agree**	**Strongly Agree**
8.1	the destination management to position itself as a "*A World of Wonders*"	1	2	3	4	5
8.2	the destination is now attracting more high spending tourists after rebranding	1	2	3	4	5
8.3	rebranding of Zimbabwe improved the destination's image	1	2	3	4	5
8.4	the destination managed to attract tourism investors after rebranding	1	2	3	4	5
8.5	destination branding objectives are being met	1	2	3	4	5
8.6	tourism outputs such as arrivals, length of stay, market share, employment etc., have been rising due to rebranding	1	2	3	4	5

		Strongly disagree	Disagree	Not sure	Agree	Strongly Agree
8.7	destination brand loyalty is on the rise as indicated by repeat visitor intentions and social media generated comments	1	2	3	4	5
8.8	destination marketing communication programmes have been successful in dealing with perception management	1	2	3	4	5
8.9	social media use at destination is effective for perception management and brand image building especially with modern tourists	1	2	3	4	5
8.10	travel trade events hosted in recent years have been effective in bringing tourism business	1	2	3	4	5
8.11	brand ambassador programmes launched since 2006 have been effective in generating tourism business	1	2	3	4	5
9	**Evaluate the tourism infrastructure of Zimbabwe:**	**Strongly disagree**	**Disagree**	**Not sure**	**Agree**	**Strongly Agree**
9.1	restaurants meets the needs of tourists	1	2	3	4	5
9.2	destination has a variety of shopping facilities for souvenirs	1	2	3	4	5
9.3	destination has enough money exchange facilities	1	2	3	4	5
9.4	destination has a variety of high quality accommodation	1	2	3	4	5
9.5	destination has efficient tour operators	1	2	3	4	5
9.6	destination has high quality entertainment facilities	1	2	3	4	5
10	**Evaluate Zimbabwe's price competitiveness:**	**Strongly disagree**	**Disagree**	**Not sure**	**Agree**	**Strongly Agree**
10.1	the use of multi-currency in the economy adopted in February 2009 has positive effect on travel	1	2	3	4	5
10.2	destination's pricing is cheaper than that of the source markets	1	2	3	4	5
10.3	the visitors to Zimbabwe are price sensitive/elastic	1	2	3	4	5
10.4	the destination has favourable tax policies on tourism services (including Value Added Tax)	1	2	3	4	5
10.5	overall prevailing economic conditions makes Zimbabwe to be price competitive	1	2	3	4	5
10.6	destination's prices affects the long haul market potential negatively	1	2	3	4	5
11	**Indicate your comment on the following moderating factors:**	**Strongly disagree**	**Disagree**	**Not sure**	**Agree**	**Strongly Agree**
11.1	the destination's visa policies promotes tourism	1	2	3	4	5
11.2	the destination and its main attractions are highly accessible	1	2	3	4	5
11.3	destination is politically stable	1	2	3	4	5
11.4	there is political will in building a competitive and attractive destination brand	1	2	3	4	5
11.5	assumed level of corruption affects Zimbabwe's competitiveness	1	2	3	4	5

11.6	print and electronic media, both in and outside the destination helps in projecting a competitive and attractive destination brand	1	2	3	4	5
12	**Zimbabwe is economically competitive because:**	**Strongly disagree**	**Disagree**	**Not sure**	**Agree**	**Strongly Agree**
12.1	there is evidence of prosperity of destination residents	1	2	3	4	5
12.2	there is evidence of increased contribution towards GDP by the tourism industry	1	2	3	4	5
12.3	the destination is able to attract Foreign Direct Investment	1	2	3	4	5

THANK YOU FOR YOUR TIME!!

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