



## A PEEP INTO TOURISM DEVELOPMENT IN ZIMBABWE: 1980-2010

Zibanai ZHOU<sup>1</sup>

### ABSTRACT

*This paper reports on the findings of an exploratory study on the level of tourism development in Zimbabwe from 1980 to 2010. I have decided to highlight both positive and negative developments in this delicate sector, and to review my recommendations based on projected performance. The study's data collection instruments were personal observations, questionnaire, follow up interviews and document analysis. The study's key finding confirms that tourism development in Zimbabwe is in the front foot as compared to the regional peers. The transformation of the ZTA, the coming on board of the mandatory tourism levy, an explicit national tourism policy and superb human resource training and skill development for the tourism sector and consequently, an uptick in tourism traffic into the country are landmark developments. On the down side, it is also found that the 2 per cent tourism levy developed a wall between operators and the regulatory authority. Operators have expressed the need for sharpened and more focused marketing strategies by the national tourism agency. It is concluded that tourism players are upbeat about prospects for the sector in the medium to long term. The study ends with recommendations and indication of future research priorities.*

**Keywords:** Tourism development, Zimbabwe tourism sector, Zimbabwe tourism authority

### INTRODUCTION

The benefits of using tourism as a strategy for local economic development have been largely publicized in existing literature, with references to benefits accruing from foreign exchange earnings, employment creation and the stimulation of the local economy among others (Honey and Gilpin, 2009; Wattana kuljarus and Coxhead, 2008; Lee and Chang, 200). As a result, many governments, especially in countries with low gross domestic product (GDP) have invested a substantial amount of tax revenues in the development of tourism (Lee and Chang, 2008; Lennon, 2003; Harrison, 1998; and Ankomah and Crompton, 1990). This general sense of optimism is founded on the positive trends and forecasts registered in the tourism industry during the past

<sup>1</sup> Midlands State University, Tourism and Hospitality Management Department P. Bag 9055, Gweru, Zimbabwe. **E-mail:** [zhouz@msu.ac.zw](mailto:zhouz@msu.ac.zw)

decade. According to the World Travel and Tourism Council (WTTC, 2012), travel and tourism industry direct contribution to global gross domestic product (GDP) stood at US\$ 6,346.1 billion (9.1 per cent of GDP) in 2011 and is forecast to grow by 2.8 per cent in 2012 and rise by 4.3 per cent per annum to US\$ 9,939.5 billion by 2022. Zimbabwe has not been left behind in reaping the fruits of this tourism boon as the country enjoyed an increase of 47 per cent in total tourism contribution to GDP constituting US\$ 770 million in 2012. This study seeks to establish the progress made in developing the tourism sector in Zimbabwe basing on the views from local operators. According to Lee and Chang (2008), Sharpley (2009), Sindiga (1999) and Page *et al.*, (2001) “a general consensus has emerged that tourism not only increases foreign exchange and incomes, but also creates employment opportunities, stimulates the growth of tourism industry and by virtue of this, triggers overall economic growth”.

## LITERATURE REVIEW

According to the World Travel and Tourism Council (WTTC), over the next 10 years, the tourism sector is set to grow in importance as one of the world's highest priority sector of the global economy and employer of first choice. The forecast for the year 2020 is that the direct industry's GDP will amount to \$ 3.7 billion, which is a 4 per cent annualised growth rate for 2011 up to 2020 while tourism GDP is expected to grow by 4.4 per cent to \$ 104.7 billion. Interestingly the IMF forecasts the two speed recovery to extend beyond 2010, led by emerging economies. The exciting trend is that Zimbabwe is leading both in terms of the 10 year annualised real growth rate of 9 per cent.

### Zimbabwe tourism overview

Tourism demand is driven by the consumer theory that asserts that the optimal consumption level depends on one's disposable income, the price of good in question, price of other substitute and complementary goods as well as demand shifters. Furthermore, accommodation stock, appeal of a destination and perceptions, both perceived and real) of the target market are equally significant determinants. For Zimbabwe tourism arrivals and receipts indicate that the sector was on unstable path in the last decades, with fluctuating performances in tandem with the deteriorating local economic conditions and the global economic crisis in 2008/ exacerbated by the global economic crisis/credit crisis which affected mostly developed world tourism markets and led to many traditional tourists cutting back on their travel and leisure expenditure. Tourism demand declined in Zimbabwe due to pressure on consumer incomes and cutting down on travel expenditure by both locals and foreigners. The supply side was also affected negatively by the dire economic situation, as no new properties were constructed while the existing facilities were not adequately maintained. The poor image of the country also did not help as several countries notably the US, Japan and Germany issued adverse travel advisories. From 2009, the tourism sector's growth trend started moving upwards and expectations are high that that in the medium to long term, we are likely to

see real positive growth. Further growth in international tourists is expected as a result of the US, Japan and Germany lifting their travel warnings.

### **Economic significance of tourism in Zimbabwe**

The tourism sector in Zimbabwe is considered critical because of the sector's employment and foreign currency generative capacity. Currently, the sector directly employs in excess of 300 000 people and support an additional 150 000 jobs indirectly. The tourism sector is ranked third in importance after mining and agriculture (RETOSA, 1998). It contributes around 12 per cent of the country's gross domestic product (GDP) and to date has generated nearly US\$ 1 billion. Currently, tourism contributes 10 per cent to GDP on the basis of 2.5 million arrivals and close to \$1 billion in tourism receipts (Zimstats, 2011). The country through the ministry of tourism targets to grow this contribution to GDP to 15 per cent in 2015, on the basis of a forecast of 5 million tourist arrivals and \$ 3 billion in tourist expenditures. As the economy improves, the sector has noted an uptick in conferencing businesses as the country becomes more and more integrated into the global scene (CHOGM, ATA and UNWTO). In addition, funding is becoming more readily available at favorable rates which should enable the players to carry out necessary refurbishments to improve their competitiveness.

### **Government interventions**

The tourism industry in Zimbabwe grew significantly in 1980 when the country attained independence from Britain. Prior to that the sector was subdued due to the war of liberation and the economic sanctions which were slapped on the country following the unilateral declaration of independence (UDI) in 1965. Soon after independence the government of Zimbabwe (GOZ) intervened in the tourism sector and quickly transformed the ZTA into a fully fledged regulatory body to superintend over all tourism activities in the country. The tourism sector then witnessed an increase in tourist arrivals and the GOZ formed a separate ministry of tourism to effectively deal with tourism matters. Subsequently, the industry grew and made headlines in the 1990s when tourist arrivals reached 2.5 million. In early 2000, the tourism sector suffered a major setback/took a nose dive following the dispute between Zimbabwe's land reform program and Britain the former colonial master who was opposed to the exercise. Visitors from the western market dropped and capacity utilisation in hotels was below 5 per cent. Due to political and economic differences between Zimbabwe and the western countries, the GOZ changed focus and looked to the East targeting China, India and other Asian countries. The timely intervention by the government laid the foundation for the birth of an approved destination status (ADS) between China and Zimbabwe, and visitor inflows from China subsequently shot up. The GOZ did not abandon the western market completely, but sought ways to normalise relations. Therefore a perception management taskforce was established to try and thaw the political and economic relations between Zimbabwe and western markets. Meanwhile many countries had issued travel warnings dissuading their nationals from visiting Zimbabwe. In particular, the EU bloc, the US, Japan, Britain, Australia, Canada and

New Zealand issued out travel warnings. Adverse media publicity on Zimbabwe was upped and the tourism sector almost collapsed.

The political environment that prevailed in Zimbabwe following the disputed and later inconclusive presidential plebiscite of 2002 and 2008 upped the adverse media reportage tempo and further isolated Zimbabwe from the international community. The International Monetary Fund (IMF) and World Bank (WB) also suspended all lines of credit to Zimbabwe owing to the fact that the country had defaulted on her financial obligations to the financial institutions. These institutions discouraged their member countries from conducting economic interaction with Zimbabwe. This further crippled Zimbabwe economically and worsened the economic challenges in form of hyperinflation, shortage of fuel and electricity, scarce basic commodities and later an outbreak of cholera.

#### **Tourism attractions and tourist activities**

Zimbabwe is blessed with tourist attractions which are primed globally (Zimparks, 2012, Reid, 1998). Such tourist attractions range from natural to man made. The country is famed for its unadulterated wildlife resource, the popular big five which are a must, that is, elephants, buffalo, hippopotamus, lion and cheetah, and the magnificent flora (Essence of Africa, 2002; Manwa, 1998). Added on this inventory are the antique Victoria Falls, Great Zimbabwe ruins, the Vumba and Inyangani mountains, Lake Kariba and Mutirikwi, the famous annual tiger fishing competition and the opening of the flood gates. Water rafting, bunji jumping and African safaris.

#### **Tourist arrivals and receipts: trends**

The Table-1 shows that Zimbabwe's tourism sector enjoyed steady and uninterrupted tourism traffic from 1980 up to 1981 soon after independence perhaps because of the euphoria associated with independence coupled with the end of the war of liberation. Some political stability was witnessed hence a huge jump in tourism traffic. From 1982 up to 1984 tourism traffic were on a downward trend most probably due to the internal political disturbances between the two former wars of liberation parties, that is, ZANU Pf and PF ZAPU, which were involved in post independence conflict. This sense partial and temporarily disturbed the political peace that had been brought by the end of the white minority rule. From 1985 up to the peak of 2003 tourism traffic reached a staggering 2.2 million. From there traffic was subdued and reached their peak in 2007 which had 2.5 million. This was indeed a watershed year for the country's tourism industry. Figures indicate that the tourism traffic is on the mend but are yet to surpass 2.5 million marks.

**Table 1: Tourist arrivals and receipts**

<b>Year</b>	<b>Arrivals</b>	<b>Receipts (US\$ million)</b>
1980	237 668	\$38.4 m
1981	313 866	\$45.5m
1982	276 910	\$35.7m
1983	230 437	\$24.9m
1984	254 335	\$26m
1985	303 387	\$23.9m
1986	318 666	\$29.3m
1987	339 328	\$32.9m
1988	412 212	\$24.5m
1989	435 875	\$40.1m
1990	582 602	\$60.2m
1991	607 029	\$54.7m
1992	675 187	\$95m
1993	879 501	\$96.4m
1994	1 039 013	\$124.7m
1995	1 415 535	\$144.6m
1996	1 596 690	\$231.8m
1997	1 335 580	\$204.6m
1998	2 090 407	\$158.4m
1999	2 249 615	\$202m
2000	1 966 582	\$125m
2001	2 217 429	\$81m
2002	2 041 202	\$76m
2003	2 256 200	\$61m
2004	1 854 488	\$194m
2005	1 558 501	\$99m
2006	2 296 572	\$338m
2007	2 500 000	\$365m
2008	1 900 000	\$294m
2009	2 000 000	\$523m
2010	2 200 000	\$634m

**Source:** ZTA annual report, 2010

## **METHODOLOGY**

This study used a questionnaire survey which was complemented by in-depth interviews with industry's key informants and personal observations. A total of 150 usable questionnaires were distributed to all registered tourist designated facilities in the 10 provinces of Zimbabwe. The ZTA database was used to access and select all registered operators. The 100 questionnaires were recovered representing a 67 per cent. Structured face to face interviews were carried out with the Ministry of Tourism and Hospitality secretary, Tour operators, Travel agencies, Air Zimbabwe, ZTA, ZCT, HAZ, Publicity Associations and BOAZ. Document analysis was done through a surgical combing of archive information on hotels, company reports, ZTA, and other operators. Finally, personal observation was made to augment all the data obtained through questionnaires, interviews and document analysis. Data analysis was conducted using content analysis.

## **RESULTS AND DISCUSSION**

The ensuing constitutes the key findings of this study and these are now discussed in detail below. Significant tourism development were noted in the enactment of the tourism levy, identification and defining of key source markets, crafting a national tourism policy, pricing model, training and skills development, adequate industry regulation through transforming the ZTA into a regulatory authority, courting airline carriers, and vigorous marketing campaigns.

### **Mandatory tourism levy**

The GOZ through the regulatory body, that is, ZTA saw it prudent to charge/levy a 2 per cent tourism levy on all tourism operators in Zimbabwe. This levy is meant among other things to fund the day to day operations of the national tourism organisation (NTO), help marketing and promoting destination Zimbabwe as a premier tourist destination locally, regionally and internationally. The NTO just like many other NTO in the region does not receive/get ample funding from the government hence the introduction of the 2 per cent tourism levy as a way of augmenting the NTO's coffers. However, study results revealed that the introduction of the 2 per cent tourism levy was received with mixed feelings among local tourism operators. Most players felt that they were not consulted on such a delicate policy issue hence they have got this feeling of being ripped off. Despite operators' concerns the government made it compulsory for all tourist designated facility to remit the 2 per cent tourism levy to the regulatory authority. Hard hit were the restaurants that even made representations through HAZ to the effect that their operations fall outside the ambit of ZTA hence see no justification what so ever for them to pay this levy. This is despite the fact that they provide food and drink to customers. However, that is the trend world over for tourism operators to pay a levy to the regulatory authority. The concern among the large chain groups is not about paying the 2 per cent levy but how the funds should be used.

### **Identification and development of key source markets**

The tourism sector in Zimbabwe relies upon the western and eastern markets. The western market and the eastern market are both long haul tourism market. Since its inception in 1980, the tourism sector got most of its visitors from the western market especially Britain due to the historical linkages between the two countries. The western market over time included other traditional markets such as the US, Canada and these markets over time evolved to become the cash cows for Zimbabwe's tourism sector. To date, Zimbabwe's tourism sector also depends on the new Asian market. This market although it is still nascent to speculate on its impact on the ground is quite promising given the economic transformation currently obtaining in Asia fronted by China that is emerging as the leading economic player by the year 2020.

Findings show that the western market has been touted as the best market by Zimbabwe tourism operators due to its high spending propensity whilst the eastern market has been viewed with

scepticism due to its low spending characteristics. Study findings confirmed that even though the GOZ embraced the Look East Policy most of the tourist visitors are still coming from the western market. Apart from these two major source markets, Zimbabwe is also trying to stimulate its domestic market. There is huge potential for tourism demand from within Zimbabwe but the absence of a tourism culture among Zimbabweans has been a factor impeding the local people from participating in tourism and other recreational activities. The study noted that the ZTA is in overdrive to try and stimulate this passive and once dormant domestic market ostensibly premised on the idea that any successful tourist destination must be supported by its domestic market. This is supported by a burgeoning middle class and the diasporans who take their families and friends for a treat at different tourist facilities. The introduction of the Tour de Tuli, township tourism, carnivals and special packages for locals is testimony to this. Also the regional market constitute yet another significant tourism market for Zimbabwe particularly the SADC countries with South Africa being the lead market in generating tourists into the country. Of late this market has been on an upward trend.

### **Crafting a national tourism policy**

The study revealed that at policy level, the GOZ subscribes to the high yield low volume tourism policy, a policy whose roots are anchored in the famous Pareto principle. This is even in synch with the UNWTO's advocacy for green tourism. In essence, it means the GOZ is conscious about the fact that tourism as an industry has the seeds to destroy itself if it is not properly regulated nor controlled. Since tourism takes place on the environment if the number of visitors are not controlled eventually the destination is bound to suffer due to depletion. The high yield (revenue side) low volume (number of tourists) tourism policy means that officially the country targets only 20 per cent of the tourism market which brings in 80 per cent of the revenue. In tourism business it is documented that it is not about tourist numbers that matter, but the financial value of the tourist arrivals, that is, the expenditure. Tourist attractions are finite and the government of Zimbabwe realised that future generations also want to benefit from the same tourism resources hence the need to responsibly use these finite resources. The high yield low volume tourism policy need to be interrogated against the new Asian market. In essence, tourism operators should come up with innovative ways to increase the average spending by tourists so that they realise more revenue from few tourists in keeping with the UNWTO's green tourism advocacy.

### **Adoption of a pricing model**

Respondents indicated that tourism operators in Zimbabwe adopted the multi-tier pricing model for the tourism product. Whilst there is no price regulation in Zimbabwe's tourism sector, respondents were quick to point out that the multi-tier pricing system has left a sour taste among international tourists. On the contrary, the locals applaud the pricing model as it affords them a chance to engage in tourism at a relatively cheaper price. However, the international market has not been happy about this pricing regime because they feel that they are being ripped off. The GOZ through an act

of parliament approved the multi-tier pricing regime but to date this pricing model has been an area of contestation between the service providers and the international visitors so much that consensus is yet to be reached and map the way forward. The multi-tier pricing model has pushed away tourists since the country is now being viewed in bad light by the international visitors as the most expensive tourist destination in Southern Africa. International visitors complain bitterly about this and it is cause for concern to Zimbabwe's tourism sector because would be visitors are now easily substituting destination Zimbabwe with other comparable regional destinations.

### **Tourism training and curriculum: human resource training and development**

Study findings revealed that since 1980, manpower training for the tourism sector was done by the hotel school in Bulawayo. However, in 1996 the GOZ in conjunction with the ZTA and the then ministry of Environment and Tourism bankrolled a tourism undergraduate degree program with the UZ. Other institutions followed suit with MSU and CUT in 1999 and 2000 respectively. This helped to augment and prepare a highly skilled human resource base for the tourism industry. To date higher degrees in tourism are offered at the UZ and MSU. The hotel school continues to offer training for the tourism sector focusing on the psychomotor skills whilst universities focus on producing a well rounded tourism and hospitality manager. This is deemed a major achievement for the tourism sector because employees are part of the product hence the need for them to have requisite and cutting edge skills. This is an area that the country as a tourist destination has excelled ahead of its regional peers. Zimbabwe trained tourism human resource is highly sought after within the region and at international level since they are considered to have come through the grill and mill.

### **Industry regulation**

Respondents indicated that in the tourism sector regulation in Zimbabwe is done by the ZTA, which is the tourism supreme body. This statutory body came into being through an act of parliament. Tourism operators revealed that they are licenced, graded and inspected by the ZTA. In addition, the regulatory body's brief include marketing destination Zimbabwe locally, regionally and internationally. It is the same body that issues operating licenses, grade and award stars to tourist designated facilities, and also does the inspection of all tourism facilities through its inspectorate and standard division. The corporate body is also collects and collates national tourism statistical data that is used for decision making at various levels within the tourism fraternity. Findings further revealed that to date, the ZTA have tourist information offices in all the Zimbabwe's 10 administrative provinces, in addition to having tourism attaches in both western and eastern markets. The ZTA sprang from the ashes of the now defunct Zimbabwe Tourist Development Corporation. To date the ZTA has successfully segmented and earmarked tourism development zones within the country as a way of underlining their commitment to developing tourism.



### **Destination access**

The study revealed that of late more international airline carriers are scrambling for the Zimbabwean sky which in itself is a pointer to a bright future for the country's tourism sector. The country as a tourist destination depend on the long haul market, and the availability of efficient airline carriers implies increased load factors as well as enhancement of access. The coming in of airline carriers is plugging the hole created when most of the reputable carriers pulled out of Zimbabwe in the late 1990s. The return of airline carriers that pulled out is a tacit approval or bold statement to say that the country's tourism sector has been on the mend and its future is bright. To complement the foregoing these airline carriers are endorsing destination Zimbabwe and would naturally become ambassadors for the destination in their respective home countries. Air Emirates, Fly Kumba, Qantas, Lufthansa are some of the airlines that have resumed operations in Zimbabwe and this is a giant step for Zimbabwe.

### **Marketing and promotion**

Research findings established that the ZTA has been in the cock pit of the marketing of Zimbabwe as a tourist destination. Whilst private tourism operators are undertaking their marketing initiatives individually they conceded that the ZTA has been on the forefront in promoting tourism within and outside the country. Without ascertaining the successes and failures in the national lead agency's marketing prowess, promotion of Zimbabwe as tourist destination got underway under the brand name Africa's Paradise. Indeed, the situation on the ground confirm that the country is a paradise within the Africa region owing to its varied and appealing tourist attractions which have been an envy of international visitors. The big five, the famous and imposing Victoria Falls, the Eastern highlands, the ancient Great Zimbabwe ruins, an unadulterated culture, flora, man-made feat in the mould of lakes Kariba and Mutirikwi and a host of other attractions have firmly put Zimbabwe on the global tourism map. The ZTA noting and reading the tourism market dynamics with exceptional dexterity sought to rebrand the country by repackaging a new brand name, which, A World of Wonders. This has seen an increase in the number of tourists. In addition the ZTA has been promoting tourism through beauty pageants, carnivals and soccer sporting events. To date the country's tourism sector has clawed back as one of the fastest growing within the SADC region. Major operators that are dotted across the breath and length of Zimbabwe's tourism landscape encompass Africa sun chain group, Rainbow Tourism Group, Cresta-Hospitality, Meikles Africa, Dzimabwwe Hospitality Group, Regency Hotel Group and a host of other independent hotels. It has been widely reported that an internationally renowned hotel group Hilton has already sets its eyes on the Zimbabwean tourism market. It is on record that the capital city Harare has already approved plans to build a 5 star 275-room Hilton Hotel in the city in a development that brings one of the world's leading hotel class to the country. The project according to the mayor is set to turn Harare into a world-class city by 2015 ([www.newzimbabwe.com](http://www.newzimbabwe.com)).

### **Opportunities for Zimbabwe's tourism sector**

The study identified the following as constituting an opportunity for the tourism sector to develop itself into dizzy heights: 2010 FIFA World Cup, 2012 ATA Congress that was held in the resort town of Victoria Falls, which is the country's tourism flagship, laid a firm foundation in endorsing Zimbabwe as a peaceful and safe conferencing destination. The significance of successfully hosting such a high profile event, after the country had had economic and political challenges was enough evidence that the country is still a giant in tourism. The crowning moment as established by the research study would be in August 2013 when Zimbabwe will co-host the 2013 edition of the UNWTO General Assembly in Victoria Falls and Zambia's Livingstone. It is anticipated that the live coverage of this global event will give leverage on Zimbabwe as a conferencing destination. Also the delegates will experience the true Zimbabwean hospitality experience, and more importantly these delegates will be ambassadors for the country when they finally return to their home countries. Zimbabwe tourism operators must capitalise on this event since the eyes of the world will be on Zimbabwe and the country has this unprecedented opportunity to showcase what it has to offer. Such an epic event coming on the back of the successfully held ATA congress can only help the country to solidify its brand in the global tourism market place.

### **CONCLUSION AND RECOMMENDATIONS**

In conclusion the study has indicated that significant milestones have been made in developing Zimbabwe's tourism sector. Issues which urgently cry out for attention include a perceived politically unstable environment, sprucing up the physical tourism product, and the absence of a tourism master plan. These are deemed to be holding back the country from realising her full potential. Finally, the study recommends that the research horizon on Zimbabwe's tourism sector be expanded to look into the effects of the tourism pricing model used by local operators which has been an area of concern among international tourists. Also a perception study on local operators on the tourism levy and its impacts on local operators' profit also calls for investigation. In addition, the efficacy of the airline service sector needs to be put on the spotlight following renewed interest by international airline carriers to service destination Zimbabwe. These are deemed future research priority area towards improving the competitiveness of destination Zimbabwe.

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