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Tourism destination competitiveness: A view from suppliers operating in a country with political challenges

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Background: Tourism in Zimbabwe has been affected by politics for more than two decades following the contested land-reform programme that was done in the year 2000. Therefore, understanding the destination competitiveness of Zimbabwean tourism is crucial for optimising tourist arrivals in the country as this industry is still contributing to the economy amid the political challenges.

Aim: Given the importance of destination competitiveness, in the era of rising global competition, this study examined the factors that make Zimbabwe a competitive tourist destination, regardless of its political challenges.

Setting: The study used data collected from hospitality and tourism managers for establishments in Victoria Falls, Great Zimbabwe, the Eastern Highlands and Harare. These are considered the major tourist destinations in Zimbabwe.

Methods: Data were collected using a quantitative design from 301 tourism and hospitality managers.

Results: The suppliers rated natural attractiveness, cultural attractiveness and human resources as critical dimensions contributing to the competitiveness of Zimbabwe. Significant to this study was the finding that perceptions differ depending on the type of establishment.

Conclusion: As competition between destinations in Africa is growing, understanding the dimensions influencing destination competitiveness is invaluable, because it enables destination managers to focus on unique critical dimensions to sustain a competitive advantage.

Keywords: destination competitiveness; tourist destination; political challenges; Zimbabwe; Africa.

Introduction

The tourism industry is considered a vital part of the economy globally due to its capacity to generate revenue and jobs (Musavengane, Siakwah & Leornard 2019; Woyo & Slabbert 2019). In Zimbabwe, the tourism sector has been the third most important contributor to the gross domestic product (GDP) for the last two decades (World Bank 2020). However, the country's GDP is estimated to have contracted by 8.1% in 2019 and the recession in the destination is projected to continue in 2020 due to persistent climate shock and domestic vulnerabilities worsened by the global coronavirus pandemic (COVID-19) (World Bank 2020). Furthermore, the performance of Zimbabwean tourism has been weak in the last 20 years following the violent land reform programme that was executed in the year 2000 (Woyo 2018; Woyo & Woyo 2019). This resulted in the country earning a negative 'bad boy' image influencing tourist arrivals to the country. Research has shown that tourism is a crucial tool through which a destination's image can be promoted (Bolourchian & Karroubi 2020).

Due to the economic benefits of tourism, tourist destinations globally are increasing investments in the industry to boost local economies (Reisinger, Michael & Hayes 2018), and Zimbabwe is no exception (Woyo 2018). Increased investments in tourist destinations have resulted in increased global competition for arrivals, as several tourist destinations are offering more and more similar tourism products (Dwyer 2015; Woyo 2018). Global competition is forcing destinations to ensure that they are competitive (Dwyer 2015); therefore, the influence of competitiveness on destination performance is significantly growing due to global and

economic trends (Ayikoru 2015; Dupeyras & Maccallum 2013; Dwyer 2015).

Competitiveness is a complex construct, whose measurement has not been standardised as several aspects are included in its composition (Dodds & Holmes 2020; Woyo 2018). Several diverse definitions are evident in literature. D'Hauteserre (2000:23) defines destination competitiveness as 'the ability of a tourism destination to maintain its market position and share and/or improve upon them through time'. Dupeyras and MacCallum (2013) define destination competitiveness 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 in the domestic and global market places, while ensuring that the available resources supporting tourism are used efficiently and in a sustainable way. (p. 7)

Based on these two definitions, though not an exhaustive list of the existing definitions, it is critical to note that attracting visitors to a destination is an important focus point of competitiveness. This view is reflected in earlier studies on destination competitiveness in which it was argued that competitiveness in a tourism context should result in increased tourism expenditure, arrivals, provision of memorable experiences, and profits (Cimbaljević, Stankov & Pavluković2019; Tsai, Song & Wong 2009).

Research concerning the evaluation of destination competitiveness has focused much on advanced and mature tourism destinations including Australia (Abreu-Novais, Ruhanen & Arcodia 2018), Austria and Switzerland (Mazurek 2014), Canada (Dodds & Holmes 2020), the Caribbean (Bolaky 2011), European destinations (Vinyals-Mirabent 2019), Spain and Turkey (Andreas-Caldito, Sanchez-Rivero & Pulido-Fernandez 2013). While there are several studies that investigated competitiveness globally, there is limited research from a developing country perspective (Ayikoru, 2015; Du Plessis & Saayman 2017; Du Plessis, Saayman & Van de Merwe 2015) that have used supply-side data to understand the important destination competitiveness factors (Woyo 2018), specifically those with political instability and economic challenges, such as Zimbabwe. This is regardless of the need for destinations to continually appraise themselves to identify their key strengths and weaknesses (Heath 2003). This study aims to identify the tourism destination competitiveness factors of Zimbabwe using supply data. The question that remains unanswered is: What are the important determinants of destination competitiveness as perceived by the supply side of Zimbabwean tourism? Do these determinants differ among different categories of supply-side respondents?

Background

One and a half billion international tourist arrivals were recorded in 2019 globally and at least two billion travellers are expected by 2030 (United Nations World Tourism Organisation [UNWTO] 2020). In the context of Zimbabwe, tourism grew faster following the country's independence in 1980 (Turton & Mutambirwa 1996), reaching its peak in 1999 (Woyo 2013). During this period, Zimbabwe was the fourth most attractive tourist destination in Africa following South Africa, Tunisia and Morocco (Woyo 2018). However, this growth did not continue, as tourist arrivals have been plummeting over the last 20 years. Added to this, growth in the global travel market has slowed in 2020 due to COVID-19, a pandemic that brought tourism to a halt by mid-March 2020 (Gössling, Scott & Hall 2020).

At the beginning of the 21st century, the Robert Mugabe administration embarked on a violent and contested land reform policy, which resulted in many white commercial farmers being forced from their land. Tourism was the most severely affected economic sector due to the political violence that reared its ugly head from the year 2000 (Woyo & Slabbert 2020). A government of major political parties was brokered by the then state president of South Africa, Thabo Mbeki, and was established in 2009, following the inconclusive presidential results of 2008. Although this arrangement brought some stability, the sector has not fully recovered from the effects of the land reform policy as it continues to receive limited arrivals and its image remains negative. These challenges are exacerbated by a worsening political environment and contested presidential elections (Woyo & Slabbert 2020). Although emerging research is beginning to understand travel behaviour in destinations that are politically unstable and economically distressed (Farmaki, Khalilzadeh & Altinay 2019; Hapairai, Walters & Li 2018; Woyo & Slabbert 2020), studies investigating what makes Zimbabwe competitive in these challenging times using supply data, remains under-researched.

The 2019 World Travel and Tourism Competitiveness (WTTC) report provides the latest information concerning the competitiveness of destinations. The Travel and Tourism Competitiveness Index measures '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'(World Economic Forum [WEF] 2019). The biennial WTTC report provides a benchmark concerning the competitiveness of the travel and tourism sector of 141 economies, including Zimbabwe. Zimbabwe has been ranked as the worst travel destination for a couple of years (Woyo 2018). The destination was ranked 115th out of 141 competing destinations in 2015 (WEF 2015), 126 out of 138 in 2017 (WEF 2017) and 114 out of 139 in 2019 (WEF 2019), implying that its competitiveness slipped due to reduced levels of economic productivity (WEF 2019). Other challenges faced by Zimbabwean tourism as documented by the WEF (2019) include inadequate health systems, reduced levels of economic productivity, poor infrastructure, inferior technology and a poor business environment. The quality of a destination is a critical antecedent of competitiveness because it influences visitation and tourism revenue (Assaf & Tsionas 2015:58). Destination quality is measured using infrastructure, human resources

and service delivery (Assaf & Tsionas 2015:59), and Zimbabwe is ranked among the lowest 10 destinations based on quality (WEF 2019). The question that remains unanswered is, with such a level of performance, what are the factors that make Zimbabwe competitive using supply-side insights?

In 2013, Zimbabwe had the opportunity to co-host the UNWTO General Assembly in the resort town of Victoria Falls. This opportunity did little to influence the negative perception about Zimbabwe as a tourist destination, as its rankings continue to be low in terms of quality and overall competitiveness (WEF 2017, 2019). The Zimbabwe Tourism Authority (ZTA), which is the national tourism organisation in Zimbabwe, ran several reputation management programmes from 2000 (Woyo 2018). Some of the tactics involved celebrities endorsing Zimbabwe as a safe destination, following the decline of tourist arrivals, due to the contested land reform programme and contested presidential elections (Woyo 2018; Woyo & Slabbert 2020; ZTA 2006). Additionally, several carnivals have also been hosted since 2013 as a means of improving destination image. However, research investigating the competitiveness factors of Zimbabwe as a tourist destination post the 2000 land invasion and the beginning of contested presidential election results using insights from the supply side is limited. Understanding these factors from the supply side is critical in unpacking the broad categories of determinants, which the industry needs to enhance in rebuilding the sector and attracting more visitors.

Literature review

Research shows that global competition for arrivals is increasing (Mackay & Spencer 2017). As a result, the promoters of destinations are now thinking and behaving more like businesses through the development of new markets, tourism products and customers as means of creating and a sustaining competitive advantage (Kubickova & Martin 2020; Woyo 2018; Woyo & Slabbert 2019). Furthermore, agents who promote destinations are also beginning to focus on the use of smart technology as a way of creating smart ecosystems to make destination competitive (Buhalis & Matloka, 2013). It is evident that destination competitiveness constitutes an essential component of destination management and growth that demands continual research.

There is a growing stream of literature focusing on destination competitiveness, suggesting that it is an area that has attracted much interest from academics (Dodds & Holmes 2020; Kubickova & Martin 2020; Villa, Darcy & Gonzalez 2015; Woyo 2018; Zehrer, Smeral & Hallmann 2017). Regardless of the growing amount of literature investigating destination competitiveness, the measurement of destination competitiveness continues to be tenuous. The number of variables that are associated with the measurement of destination competitiveness appears to be increasing. Previous research shows that the methods of investigation has either employed an objective or subjective methodology (Heath 2003; Zehrer et al. 2017) using predominantly demand-side respondents. The objective methodology measures destination competitiveness using actual figures (volume, market shares, tourist arrivals, tourism revenue, employment growth, value addition, visitor spending and length of stay) (Woyo 2018; Zehrer et al. 2017). Subjective indicators measure competitiveness 'on the basis of tourists' expectations and perceptions of the destinations on the competitiveness of destinations' (Zehrer et al. 2017). These are some of the aspects that show that competitiveness is a multidimensional construct (Kubickova & Martin 2020) and suppliers in the tourism industry must have a comprehensive understanding of these elements to make decisions on how to improve and sustain the competitiveness of the destination.

Due to the multidimensionality of the construct, competition in a tourism context happens at multiple levels, including the firm, regional and national levels (Kubickova & Martin 2020). Analysing these levels directly links with the suppliers that operate on all these levels. Prior research shows that destination competitiveness has three significant objectives, that is, the economic well-being of residents, destination attractiveness and satisfaction provided by the destination, and sustainability (Abreu-Novais et al. 2018). To improve the residents' income and well-being, there is a need to understand the views of supply-side managers on what makes a destination competitive. Additionally, for a destination to satisfy the needs of its visitors better than the competition, research must critically unpack the views of the suppliers. These stakeholders not only provide the tourism products to visitors but also sell the Zimbabwean experience and have knowledge of destination competitiveness factors that will enhance marketing efforts.

Several models regarding destination competitiveness have been put forward in the literature (Crouch 2011; Kubickova & Martin 2020). Most of the destination competitiveness modelling is underpinned by the ideas of Porter's (1960) diamond model. The analysis of the models shows that there are several determinants of destination competitiveness. These include core resources and attractors, supporting factors and resources, destination policy, planning and development and qualify determinants, endowed resources, created resources, destination management, situational conditions, demand factors and market performance (Crouch 2011; Dwyer & Kim 2003; Kubickova & Martin 2020; Ritchie & Crouch 1993). Given the uniqueness of destinations, measuring the competitiveness of a destination with political challenges might change the factors or the importance of certain factors. Most of the destination competitiveness modelling has been done for European destinations with a lack of similar insights within the African context.

To the best of our knowledge, there are destination competitiveness studies but few of these have developed models with the African destination in mind. Heath's (2003) model for South Africa, which is presented as a house, argues that tourism competitiveness of destinations is determined

firstly by the foundations, which focus on attractions management, addressing the fundamentals, providing the enablers, capitalising the value adders, ensuring appropriate facilitators and aspects that enhance experiences. Secondly, the Heath model argues the need for the 'cement' in the form of effective communication channels, stakeholder involvement and managing competitive indicators. This would then lead to the sustainable development of policy and frameworks for destinations, including marketing. Lastly, the model discusses the critical success drivers that include a shared tourism vision and leadership and other aspects, such as political will and entrepreneurship. Therefore, research investigating the dimensions of competitiveness in politically and economically volatile destinations using supply-side data is lacking, despite the need for destinations to always analyse the factors that promote such (Crouch 2011). This study seeks to close this gap.

Methods

Data collection and sampling

The study employed a quantitative methodology to identify the factors that make Zimbabwe a competitive destination regardless of its political and economic challenges, specifically from the supply point of view. Using managers from selected tourism and hospitality establishments in Victoria Falls, Harare, Great Zimbabwe and the Eastern Highlands, data were collected using a structured questionnaire (in English). The questionnaire had two major sections. The first section of the instrument collected data on the organisational profile, focusing on the category of the establishment, years of operation, the number of employees, in-season, repeat business and unique selling propositions. Secondly, the questionnaire collected data on destination competitiveness measured using a five-point Likert scale (1 = strongly disagree; 5 = strongly agree). The scale for destination competitiveness was developed based on an in-depth literature review (Assaf & Tsionas 2015; Kim 2012; Buhalis 2000; Kulendran & Dwyer 2009; Mihalic 2016; Ritchie & Crouch 1993).

As stated before, destination competitiveness factors have predominantly been investigated in more mature destinations, with stable economies and political governments. This is the first measurement of destination competitiveness factors for a destination with ongoing political and economic challenges, and in particular, from a supply perspective. A pilot study was thus done among 30 hotel and tourism managers in Harare to evaluate the measurement efficacy. The measuring instrument was revised and enhanced following the suggestions of the pilot survey. The responses of the pilot study were not included in the final analysis of the results.

Data were collected from a convenience sample that was accessible to the researcher and four field assistants between November 2016 and January 2017. These field assistants were informed of the aims of the study and trained by the researcher in Harare on how to approach the respondents and collect the data. The database kept by the ZTA shows that there are 1281 tourism and hospitality operators countrywide (ZTA 2016). The guidelines of Krejcie and Morgan (1970:608) were used to derive a sample size of 297. Based on this, 320 questionnaires were eventually administered to tourism and hospitality managers, or to those who were seconded by the managers to complete the survey instrument. Altogether 301 questionnaires were completed, representing a 94% response rate.

Data analysis

Data were analysed using SPSS version 26.0 focusing on descriptive and inferential statistics. Descriptive analyses were performed to determine the profile of the sample using

TABLE 1: Description of sample.

	N	%
Gender		
Male	103	34.22
Female	198	65.78
Educational qualifications		
No school	50	16.61
Diploma or degree	128	42.52
Postgraduate	123	40.86
Categories of establishments		
Accommodation	51	16.94
Food and beverage	36	11.96
Attractions related	49	16.28
Meetings, incentives, conferencing and exhibitions	15	4.98
Tour operators	114	37.87
Museums and cultural organisations	36	11.96
Position of the respondents		
Operations	172	57.14
Marketing	95	31.56
General manager	24	7.97
Receptionist	10	3.32
Number of years in operation		
1–10 years	46	15.30
11–20 years	50	16.60
21–30 years	21	7.00
31–40 years	100	33.20
41–100 years	84	27.90
Number of temporary employees in the establishment		
1–20 employees	234	52.00
21–50 employees	28	6.20
51–100 employees	36	8.00
101–150 employees	2	0.40
151–200 employees	1	0.20
Number of permanent employees in the establishment		
1–30 employees	87	19.30
31–70 employees	94	20.90
71–100 employees	60	13.30
101–200 employees	23	5.10
201–300 employees	29	6.40
More than 300 employees	8	1.80
Key unique selling points of Zimbabwe		
Natural attractions	-	-
Cultural attractions	-	-
Historical attractions	-	-
Unique selling points of the organisation		
Attractions or product	-	-
Hospitality	-	-

frequencies and percentages (Table 1). The study used exploratory factor analysis (EFA) to identify the underlying destination competitiveness of Zimbabwe as a tourist destination. Using the extracted factors, we conducted multivariate analysis of variance (MANOVA) to identify the significant differences in the factors among six groups of tourism and hospitality establishments after checking the assumptions of MANOVA. Lastly, the Bonferroni post-hoc test was performed to identify where significant differences existed.

Results

Summary of demographic characteristics

Most of the respondents were female (65.78%), who were drawn from several managerial positions, including Operations (57.1%) and Marketing (31.6%), suggesting that women are represented in management positions. Results show that most of the respondents hold a diploma or degree qualification (see Table 1). Much of the data were collected from tour operators (37.8%), followed by accommodation providers (16.9%). Most of these businesses have been operating in Zimbabwe for more than three decades (33.2%), while 27.9% of the sample have been conducting business for more than four decades. Therefore, the opinions shared by suppliers on the issues under investigation are valuable, given the time these businesses have been operating. Relatively newer hospitality and tourism operations were 15.3%. Due to the challenging economic environment in Zimbabwe, hospitality and tourism operations have a small permanent workforce (20.9%). This creates challenges in building the tourism industry in such a volatile environment, as job creation is minimal. Those with a more significant permanent workforce were 6.4% of the sample. Altogether 52% of the respondents indicated that they hire between 1 and 20 temporary employees in a month, which is high, depending on the size of the business. The unique selling points for Zimbabwe are believed to be the country's natural, cultural and historical attractions, including Victoria Falls and the Great Zimbabwe Ruins. Organisations that participated in this survey also indicated that their unique selling points stem from the attractions that the country has and the hospitality and service they offer to travellers. Therefore, from a supplier's perspective, Zimbabwe must develop its strategic destination marketing communications around the destination's unique selling points.

Competitiveness factors of Zimbabwe

Exploratory factor analysis was conducted to determine the underlying destination competitiveness factors before implementing further multivariate analysis. The factors that were retained for analysis were those that generated eigenvalues greater than 1 (Malhotra 2010) and factor loadings of 0.50 and above. Those that loaded below 0.50 were deleted. The EFA results generated a Kaiser-Meyer-Olkin (KMO) above the recommended 0.60 (0.78) (Malhotra 2010). Bartlett's sphericity test was significant (p = 0.001), suggesting that the factorability of the correlation matrix in this study was supported. The factors generated high internal consistency and reliability, as the Cronbach's alpha was higher than the recommended 0.60 in all instances (Malhotra 2010). The EFA produced an eight factor solution (Table 2)

TABLE 2: Results of exploratory factor analysis.

Variable	Factor loading	Mean
Factor 1: Natural attractiveness (α = 0.74)	-	4.24
Destination's visual appeal	0.774	-
World-class wildlife resources	0.765	-
Visitor safety	0.696	-
Climate and weather	0.668	-
World-class natural attractions	0.639	-
Well-known landmarks	0.607	-
Factor 2: Destination quality (α = 0.70)	-	4.11
Quality human resources	0.752	-
Tourist receipts as an indicator of destination quality	0.639	-
Ground and airport infrastructure	0.628	-
Quality hotels and tourism facilities	0.591	-
Quality recreational centres	0.528	-
Factor 3: Cultural attractiveness (α = 0.70)	-	4.03
Local cuisine	0.783	-
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	0.514	-
Factor 4: Quality human resources (α = 0.90)	-	3.97
Quality of the educational system	0.785	-
Qualified tourism and hospitality staff	0.784	-
Local availability of specialised research and training	0.772	-
Staff training	0.516	-
Factor 5: Tourism infrastructure (α = 0.82)	-	3.93
Money exchange facilities	0.668	-
Variety of restaurants	0.648	-
Variety of shopping facilities	0.549	-
Efficient tour operators	0.549	-
Quality entertainment facilities	0.546	-
Quality accommodation	0.534	-
Factor 6: Politics and policies (α = 0.86)	-	3.31
Visa policies promote tourism	0.736	-
Destination and attractions accessibility	0.708	-
Political will for building competitive destination brand	0.633	-
Factor 7: Destination management (α = 0.75)	-	2.96
Periodic marketing and brand research	0.759	-
Innovative tourism destination	0.757	-
Destination management organisation's monitoring and evaluation of destination performance	0.754	-
Destination coordination and alliances	0.58	-
Commitment towards the development of a favourable destination brand	0.578	-
Stakeholder accountability	0.5	-
Community support for sustainable tourism	0.479	-
Private sector support	0.439	-
Factor 8: Price competitiveness (α = 0.64)	-	1.9
Tax policies on tourism services	0.836	-
Prevailing economic conditions make Zimbabwe pricing competitive	0.732	-
Cheaper destination pricing compared to the regional destinations	0.668	-
Destination's prices promote long-haul market	-0.552	-
Multi-currency makes vacation cheaper	0.539	-

Note: Kaiser-Meyer-Olkin = 0.78; p = 0.000; Total variance explained = 70.5%.

identifying the competitiveness factors of Zimbabwe as a tourism destination with perpetual economic and political challenges.

The first factor to explain the competitiveness of Zimbabwe was labelled natural attractiveness, which explained 40.3% of the variance with a reliability score of 0.74. The supply-side respondents perceive Zimbabwe as competitive based on the natural attractions that it offers to travellers, including good climate and world-class natural resources, such as Victoria Falls. This factor was given more prominence, based on the mean score ($\bar{x}$ = 4.24). Factor 2 was labelled destination quality and explained 22.4% of the variance with a reliability score of 0.70. The factor had a mean score of 4.11, suggesting that the supply-side respondents perceive destination quality as a critical determinant of competitiveness for Zimbabwe, regardless of its political and economic challenges. The competitiveness of a destination is affected by the quality of the tourism experience (Cimbaljević et al. 2019), which tourism suppliers are responsible for. Zimbabwe, as a distressed destination, is still receiving tourists (Woyo & Slabbert 2020) which shows that the destination shows some elements of competitiveness regardless of the challenges it faces. The tourist arrivals to Zimbabwe are, however, too low to be competitive per se, but clearly these factors contribute to sustaining tourist arrivals, which range around two million per annum (ZTA 2019). Ground and airport infrastructure were considered an important element of destination quality by the supply-side respondents. However, respondents noted that while Zimbabwe's road infrastructure is important for destination competitiveness, it currently lowers the competitiveness of Zimbabwe due to a lack of maintenance (Woyo 2018; Woyo & Woyo 2019).

The third factor was labelled cultural attractiveness. This factor emerged as important, with a mean score of 4.03, explaining 15.9% of the variance and a reliability score of 0.70. The local cuisine of the destination showed the strongest association with the latent variable. Guan and Jones (2015) argue that local cuisine of a destination is a critical antecedent for destination competitiveness and attractiveness, since it is a unique element to be marketed to tourists. Quality human resources emerged as the fourth most important factor, perceived by the supply side as a critical determinant of competitiveness of Zimbabwe ($\bar{x}$ = 3.70). This factor explained 10.3% of the variance, with a Cronbach's alpha coefficient of 0.90. The importance of staff should not be underestimated, and African communities are well known for their hospitality, which is an aspect to be highlighted to potential visitors. The fifth factor was labelled tourism infrastructure. This factor explained 12.3% of the variance, with a reliability score of 0.82. The mean score of 3.93 suggests that respondents do perceived this a critical destination competitiveness factor. Although tourism infrastructure is well documented in the wider literature (Woyo 2018; Xie & Tveterås 2020), elements that contribute to this factor are likely to differ from one tourist destination to the next. Aspects such as money exchange facilities, a variety of restaurants and shopping facilities form part of this factor. There is a need for continually increased capital spending in tourism infrastructure as a means of enhancing competitiveness (Xie & Tveterås 2020) and this is not currently happening in all areas of Zimbabwe.

The sixth most important factor was labelled politics and policies ($\bar{x}$ = 3.31). The concern was to measure the role that political players and tourism policies play in determining the competitiveness of Zimbabwe. Dwyer and Forsyth (2011) argue that policies are critical elements that influence destination competitiveness. Even though it was measured in this study, it was clear that the role of politics in determining destination competitiveness in Africa and Zimbabwe requires further unpacking. This factor was explained by 9.11% of the variance with a reliability of 0.86. The lower rating of this factor was an interesting result with the suppliers considering it less important. The seventh factor was labelled destination management. This factor has been identified in past studies (Crouch 2011; Ritchie & Crouch 1993). The mean score for this factor was 2.96 suggesting that the destination does not perform well in this regard. Aspects such as marketing, innovation, the role of destination management organisation and commitment to the development of Zimbabwe as a tourist destination were a concern. The last factor was named price competitiveness, which had a reliability score of 0.64. Based on the mean, it appears that the destination is not competitive, and past studies have identified that Zimbabwe is an expensive destination (Woyo 2018; Woyo & Woyo 2019). The price competitiveness of Zimbabwe is weak because of weakening currency induced by economic decline and political instability.

Based on the indices computed for each competitive factor (Table 3), natural attractiveness and cultural attractiveness factors are rated high by managers from all the establishments. However, differences were observed in

TABLE 3: Mean scores for indices of tourism establishment categories for competitiveness dimensions.

Establishment category	Destination competitiveness factors							
	Natural attractiveness	Destination quality	Cultural attractiveness	Human resources	Tourism infrastructure	Destination management	Politics and policies	Price
Accommodation or hotels	67.20	41.11	63.20	66.55	37.20	41.22	37.20	57.20
Food and beverage	61.30	38.29	74.93	50.14	31.30	40.78	31.36	41.30
Attractions related	63.48	43.48	53.58	54.43	33.48	43.54	33.38	53.78
Meetings, incentives, conferencing and exhibitions	66.24	46.94	62.27	56.78	36.75	48.02	36.34	56.44
Tour operators	67.59	47.50	64.33	66.04	37.81	45.37	34.86	47.97
Museums and cultural	59.45	49.45	69.45	60.33	59.45	45.01	39.55	49.45

other competitiveness factors. Human resources were rated highly by respondents from the accommodation, tour operator and museum establishments. Price received a high value from respondents drawn from the accommodation sector, but most of the establishments rated it lower. Other competitiveness factors that were rated with lower indices include destination quality, tourism infrastructure, destination management, as well as politics and policies.

Comparing destination competitiveness factors among suppliers

The study employed MANOVA in answering the research question, 'do these determinants differ among the supply-side respondents?'. Identified perceptions of supply-side respondents, regarding destination competitiveness factors, using EFA, were analysed by means of MANOVA because it allows concurrent examination of multiple independent and dependent variables (Hair et al. 2010). The study also employed the Tukey test as part of the post-hoc tests. Analysed results showed moderate correlations between dependent variables, ranging between 0.179 and 0.78, and this was considered appropriate for the study.

The MANOVA analysis of the perceptions of supply-side respondents regarding the destination competitiveness factors of Zimbabwe produced a significant model (Wilks's $\Lambda = 0.690$; $F(4,2,758) = 9.261$; $p = 0.000$). Thus, the estimated model indicates that there were significant differences between the respondents drawn from various establishments in the Zimbabwean tourism industry.

The univariate between-subject tests analysis also showed significant differences based on the category of establishment and the competitiveness factors, particularly with natural attractiveness ($p = 0.000$), cultural attractiveness ($p = 0.003$) and human resources management ($p = 0.04$) (Table 4). The Bonferroni correction with post-hoc test was applied at the significance level of 0.005 to determine if differences occur between subject tests and establishments. Firstly, natural attractiveness was perceived significantly more important by the accommodation sector ($\bar{x} = 3.95$) and attractions-based establishments ($\bar{x} = 3.93$) than food and beverage establishments ($\bar{x} = 3.35$). Secondly, food and beverage establishments ($\bar{x} = 4.45$) and museums ($\bar{x} = 4.15$) considered cultural attractiveness the most important factor influencing destination competitiveness of Zimbabwe, compared to accommodation ($\bar{x} = 3.66$) and meetings, incentives, conferencing and exhibitions ($\bar{x} = 3.45$). Thirdly, accommodation ($\bar{x} = 4.17$), meetings, incentives, conferencing and exhibitions ($\bar{x} = 3.95$), attractions ($\bar{x} = 3.89$) and tour operators ($\bar{x} = 3.88$) perceived human resources as a critical aspect of competitiveness in Zimbabwe. In summary, those in accommodations and attractions establishments gave relatively more weight to natural attractiveness and human resources factors than managers in other establishments. In contrast, food and beverage establishments considered cultural attractiveness to be more important than those in other establishments. Other competitiveness factors such as destination quality, price, tourism infrastructure, destination management and politics did not show significant differences among establishments.

Conclusion

The current study contributes to literature by identifying the dimensions influencing the destination competitiveness of a country with political challenges from the perspective of suppliers. Even though destination competitiveness factors have been identified in previous studies, the grouping of these aspects were unique. The following main findings are evident from the data analysed in this study. Firstly, the most important destination competitiveness factors for a destination in distress are natural attractiveness, destination quality and cultural attractiveness. With natural attractiveness as the most important competitiveness factor, the focus of competitiveness building should be on visual appeal and wildlife resources. Establishments that sell natural tourism products such as national parks and natural landmarks, including Victoria Falls, directly contribute to the competitiveness of Zimbabwe. This could be attributed to the fact that these products form part of their core business, and most of the international tourists to Zimbabwe often visit these places, thus giving the country a default competitiveness dimension. Natural attractions are widely marketed in the country (Woyo 2018; Woyo & Slabbert 2019; Woyo & Woyo 2019), hence the reason why the suppliers perceived natural attractiveness as a competitive dimension for a distressed destination. While these aspects of the

TABLE 4: Results of multivariate analysis of variance.

Factor	Tourism and hospitality establishments												F	Partial eta-squared
	Accommodation (n = 51)		Food and beverage (n = 36)		Attractions (n = 49)		Meetings, incentives, conferencing and exhibitions (n = 15)		Tour operators (n = 114)		Museums (n = 36)			
	M	SD	M	SD	M	SD	M	SD	M	SD	M	SD		
Natural attractiveness	3.95	0.89	3.35	0.60	3.93	0.72	4.09	1.00	4.03	0.84	3.2	0.71	8.371***	0.709
Destination quality	4.21	0.75	4.05	0.68	4.1	0.90	3.47	0.73	3.35	0.92	2.31	0.81	1.733	0.888
Cultural attractiveness	3.66	0.60	4.45	0.93	3.12	0.90	3.45	0.83	3.53	0.90	4.15	0.93	1.987**	0.786
Human resources	4.17	0.87	3.47	0.73	3.89	1.12	3.95	0.69	3.88	0.87	3.4	0.90	12.781*	0.546
Tourism infrastructure	2.93	0.93	4.08	0.89	3.27	0.77	4.03	0.96	3.34	0.91	1.89	0.88	13.773	0.341
Destination management	3.1	0.73	4.06	0.59	3.12	0.89	4.34	0.72	2.45	0.89	3.4	0.95	2435.01	0.504
Politics and policies	2.25	0.85	3	0.67	3.09	1.04	2.98	1.25	2.48	1.12	3.42	0.78	14.782	0.203
Price	2.78	0.55	3.73	0.65	3.59	1.03	3.4	0.80	2.61	1.00	2.34	1.25	1.235	0.488

*, $p < 0.05$; **, $p < 0.01$; ***, $p < 0.001$; Wilks's $\Lambda = 0.690$, F (4, 2,758) = 9.261, $p = 0.000$***. Significance level of between-subjects tests is 0.005, as Bonferroni correction has been applied.

destination should continue to be marketed, there is a need to also ensure that the safety of tourists is not compromised. Furthermore, it is interesting to note that the suppliers considered natural attractiveness as the most important factor. In their case they have control over factor 2, which is directed at the industry, and these aspects can be effectively managed and improved. Although some of these factors have been confirmed in previous studies (Crouch 2011; Guan & Jones 2015), it is the first time they are being reported in a destination with political challenges using the perspectives of the supply side. The importance of natural attractiveness as a competitiveness factor can be of benefit to Zimbabwe post-COVID-19 as tourists might want to travel to destinations with open spaces where social distancing is easier to adhere to.

Secondly, there are significant differences between establishments and competitiveness factors and this poses a challenge that must be addressed by policymakers as the establishments should all agree on the destination competitiveness factors since they are selling the same country. Perceptions of managers in the accommodation and attractions sector are significantly higher than those of other establishments. These managers perceive Zimbabwe as competitive due to natural attractiveness, cultural attractiveness and human resources. This could be attributed to the fact that these are the critical tourism products that Zimbabwe sells to tourists. Although identified as important competitiveness factors, there are no significant differences between tourism infrastructure, and politics and prices, as all the managers rated them lower. Previous studies have established, using demand data, that Zimbabwe is an expensive destination (Woyo & Slabbert 2020; Woyo & Woyo 2019). Woyo and Slabbert (2020) argue that Zimbabwe could be an expensive destination because of the 'use of the US dollar which often results in price differentials, especially for the African market, as most currencies are weaker than the US dollar'. It therefore becomes imperative that the issues of price, dilapidated infrastructure and policies be improved to enhance the competitiveness of Zimbabwe as a tourist destination.

This study offers relevant insights into the competitiveness of distressed destinations because the packaging of competitiveness factors is different to previous studies. Understanding the perceptions of the factors contributing to destination competitiveness is critical for the formulation of destination management policies (Crouch 2011) and brand messages by the destination management organisation. These policies, when developed, need to be implemented by establishments. The destination management organisations must continue to promote the natural attractions in Zimbabwe. However, efforts must be made to innovate new product offerings, especially those that could help to co-create positive tourism experiences like food tourism, gastronomy and cultural events with the aim of attracting more arrivals to the destination. These innovative products must be developed by establishments to be promoted by the marketing organisations of the destination.

The study is limited in that only establishments in major tourist hubs in Zimbabwe participated in the survey. Future studies could include a larger sample across Zimbabwe and must also be done in other African countries to further substantiate the competitiveness factors related to the continent. Furthermore, instead of using established scales, there is a need for future studies to employ other methodologies and designs like the exploratory sequential design to generate a more nuanced insight into the competitive dimensions of Zimbabwe and future studies could make a comparative assessment studying demand-side respondents. Other aspects that could be researched include the role of government initiatives on destination competitiveness.

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Competing interests

The authors have declared that no competing interests exist.

Authors' contributions

E.W. made contributions in the areas of conception, data collection and analysis. E.S. did a critical review of the initial draft, ensured that the appropriate methodological approach was followed and gave the direction for the work. All the authors read through the various versions of the work and approved the version that was submitted for review and publication.

Ethical consideration

Ethical approval for this study was obtained from the Faculty of Economic and Management Sciences of the North-West University (Potchefstroom campus; approval number: EMS15/10/15-02/03). Written informed consent was obtained from all respondents before the study.

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Data availability statement

The authors confirm that the data supporting the findings of this study are available within the article.

Disclaimer

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