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Zimbabwean Tour Operators' Structure and Information Communication Technologies Adoption

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Abstract: The purpose of the study is to identify the characteristics of the Zimbabwean tour operators with a view of ascertaining how these characteristics impacted on their adoption of information communication technologies. Quantitative method was used to gather data for the study utilizing self administered structured questionnaires. The study showed that the majority of the tour operators were small and medium sized enterprises (SMEs) most of whom were family owned. It was concluded that the size and ownership characteristics of the tour operators precluded them from prioritizing adoption of information communication technologies. The study recommended that tour operators need to be empowered through ICT awareness training programmes.

Keywords: Tourism, tour operator, ICTs SMEs.

INTRODUCTION

The tourism industry in Zimbabwe is made up of a number of subsectors. Table1 below shows the associations that represent different subsectors of the industry. Each of the associations focuses on ensuring that the needs of their members are effectively articulated to different stakeholders in the country. The associations also endeavour to ensure that their members abide by the agreed codes of conduct. With regard to tour operations, the most critical associations are the Safari and Operators Associations and the Inbound Tour operators Association.

The two associations deal with the interests of different tour operating enterprises in the country. It is critical for the associations to be aware of the global changes that are taking place with regard to the tour operator business model so that they will be in a position to advise their members appropriately.

Table-1: Tourism private sector associations in Zimbabwe

Association	Sector Represented
Zimbabwe Council for Tourism	All sectors
Board of Airlines of Zimbabwe	Airlines
Safari and Operators Association of Zimbabwe	Hunting and Safari Operators
Hotel Association of Zimbabwe	Accommodation: hotels, lodges
Zimbabwe Vehicle Rental Association	Transport
Inbound Tour Operators Association of Zimbabwe	Inbound & Ground tour operators
Zimbabwe Travel Agency Association	Travel Agents
Zimbabwe Professional Guides and Hunters Association	Professional Hunters and Guides
Boat Owners Association of Zimbabwe	Boat Owners

The Zimbabwe Council for Tourism (ZCT) is the umbrella organization that represents the interests of all private sector organizations in the tourism industry. It was established in 1988 with a view to having a single organization that would articulate the interests of the members of the tourism industry. It is the official contact point between government and the private sector.

The Safari and Operators Association of Zimbabwe's (SAOZ) mandate is to ensure that the needs of its members are properly addressed by government. Most of its members are involved in trophy hunting tourism. The organization also endeavours to ensure that its members adhere to ethical business practices and encourage the public to report on any of its members who break government regulations when carrying out their operations.

The Inbound Tour Operators Association of Zimbabwe (ITOAZ) was established in 1994. It represents the business interests of tour operators and destination management companies which operate in the country.

The purpose of the study is to identify the characteristics of the Zimbabwean tour operators in order to assess how these characteristics impact on the adoption and use of information communication technologies.

Background

The tour operating industry in Zimbabwe has been characterised by the dominance of one or two large companies with a proliferation of small family run companies. From 1980 to 1986, two companies namely, United Touring Company (UTC) and Abercrombie and Kent (A&K), were the major tour operating companies. Between 1990 and 1999 the subsector was dominated by UTC, Shearwater Adventures Tourism Services Zimbabwe with Shearwater Adventures controlling for 80% of the market. Currently the largest companies in the subsector with regard to market share are Wild Horizons, Shearwater Adventures and Rockshade Tours and Travel [1].

The subsector is composed of different categories that specialize in different forms of tour operations. Table-2 below shows the number of entities in the subsector for the period 2000 to 2015

Table-2: Number of tour operators and related tourism business entities in Zimbabwe (2000-2015)

Category	2000	2005	2010	2015
Tour operators	118	56	60	96
Photographic safaris	186	94	47	45
Hunting safaris	165	119	68	82
Incentive travel operators	117	75	101	101
Conference organizers	8	2	0	7

Source: ZTA (2016) [2]

There has been an overall downward trend of business entities in all the subsectors of tour operations reflecting the challenges that the sector as a whole has experienced since 2000. Whilst business entities in the subsector are showing signs of recovery since political stability returned to the country in 2009 photographic safaris have failed to recover. The main reason is that a large number of these enterprises operated in commercial farms. The majority of the new farmers have limited interest in the business as they do not have adequate knowledge of the tourism industry.

To date there has been no detailed research that has been undertaken to assess the level of information communication technology adoption across the tour operating sector in the country. The adoption of information communication technologies for the majority of the tour operators in the country is confined to the use of websites for the provision of product information to potential tourists. The major operators like Shearwater, Wild Horizons, and Wilderness Safaris have websites that are attractive, easily navigable and provides the potential tourists with adequate information to make a decision on purchasing a holiday to Zimbabwe. For example the website for Wild Horizons (www.wildhorizons.co.zw) has outstanding photographs of attractions and products in Victoria Falls, has a detailed map of the area and has an electronic brochure showing a wide range of tour packages' that the company offers in Victoria Falls. It is visually appealing and is constantly updated. The main drawback is that customers are not able to book directly with the company as bookings have been made through travel agents. This is an old fashion way of conducting which is frustrating to today's tourist who expect instant responses to their holiday needs

Similarly the website for Shearwater Adventure (www.shearwateradventure.co.zw) besides being well designed and easily navigable offers a number of social network platforms like Facebook and Twitter through which the customers can interact with the company. Whilst clients can make direct bookings to the company through the website there is no facility for them to be able make payments for their holidays.

Some tour operators' websites are still rudimentary and hence are not user friendly. For example websites of companies like Khanondo tours and travel, Falcon tours and travel and Wenhau tours are difficult to access, slow and difficult to navigate, are hardly updated and offer no prices for the products and services being marketed.

Whilst tour operating enterprises in the country have been unable to follow the current world trend in using information communication technologies, the other subsectors of the industry like hotels, airlines and travel agents have incorporated the use of information communication technologies in their business operations. The hotel group Africa Sun, for example, is now using the Global Distribution System (GDS) which enables customers in any part of the world to book and pay for their accommodation online [3]. The website is well designed and visually pleasing. It offers submenus which include reservations, cancellations, customer feedback, and videos showing details of the properties of the company. It further offers a payment platform, social networks and financials reports of the company. The quality of the site and its navigability helps to create product confidence in the customer and is therefore an effective marketing and e-commerce platform for the company.

Similarly the other major hotel chain in the country, Rainbow Tourism Group (RTG) has ensured that all its hotels are connected by fibre optic cable for ease of internet access. Clients are able to pay for services through visa, master card or the Eco-Cash platform. The company recently established an internet based partnership product, the RTG Virtual, whereby its central reservation system is linked to a wide range of independent hotels and other products which tourists can book through the group's central reservation system. These developments have resulted in the company recording a 284% increase in revenue during the first half of 2013 compared to the same period in 2012, (www.rtgafrica.com/files/analysts-briefingpresentation).

Tour operators in Zimbabwe have been slow in introducing information communication technologies in their business operations [4]. In order for them to remain globally competitive they need to improve the use of information communication technologies in their enterprises and re-engineer their business models.

STUDY OBJECTIVES

The study sought to achieve the following objectives:

- To identify the determine the size of the enterprises;
- To determine the ownership characteristics of the tour operators
- To assess the level of ICT adoption and use by the tour operators

LITERATURE REVIEW

The tourism industry is globally dominated by small and medium sized tourism enterprises, [5-14].

The majority of developing countries suffer from what has been referred to as "the digital divide" [15-17]. Shanker argues that the lack adequate and efficient information communication technologies in most developing countries have slowed down the change of the distribution channels of the tourist product. Karanasios [17] notes that the problem is exacerbated by the dominance of small and medium sized tourism enterprises in the developing countries whose financial base is limited and knowledge about information communication technologies is minimal.

Several studies in developing countries, [8, 11, 10, 18-21] have shown that enterprises in developing countries face a wide range of challenges in their attempts to adopt information communication technologies These include among others:

- Management lack of understanding of the role of icts in business operations;
- Cost of initial capital to purchase equipment;
- Lack of consistent supply of electricity;
- Lack of trained and knowledgeable staff;
- Difficult in integrating new systems;
- Lack of appropriate technologies;
- Lack of confidence in ICT benefits;
- Security concerns;
- Limited ICT infrastructure; and
- Lack of government incentives

Wanjau *et al.,* [10] point out that SMTEs have been slow in embracing e-commerce. In Europe studies undertaken by Reino and Baggio, [5] indicated that the majority of the European companies have yet to fully adopt information communication technologies in their operations. Similar observations were made by Duff with regard to SMTEs in Ireland. In his review of the literature Duff notes that the level of adoption of information communication technologies by SMTEs differs from organization to organization depending on a variety of factors in which the enterprise is operating. In his study of tour operating enterprises in Ecuador Karanasios, [17] shows how the tour operators are still using basic information communication technologies and highlights some of the challenges the enterprises face in adopting ICTs. Within South Korea Kim, [6] observed that whilst SMTEs were keen on adopting information communication technologies a majority of them did not have a full appreciation of the implication of using the technology in their businesses Potigieter *et al.*, [11] in their study of tour operators in South Africa indicated that 59.6% of the respondents had some form of information system in their enterprise whilst 39.7% were uncertain of the type of information system they were using in the business.

METHODOLOGY

The quantitative approach was used to gather the data on the characteristics of the tour operating enterprises in the country as well as their level of adoption and use of information communication technologies for product distribution. Self administered structured questionnaires were distributed to a sample of 123 tour operators in Harare, the capital city of the country and Victoria Fall, the country's prime tourist resort. A total of 84 questionnaires were successfully completed hence achieving a response rate of 68.29 %. The response rate of 68.29% was significantly high. According to Saunders *et al.*, [22] response rates of 35-40% are adequate for academic studies to make generalizations on the population of the study. Therefore, the response rate of 68.29% was adequate to drive generalizations on the whole population.

FINDINGS

Response Rate

Out of the 123 questionnaires that were distributed, 84 were successfully completed and returned. Table 3 shows the response rate of the questionnaires.

Table-3: Questionnaire response rate

Item	Count	Percentage
Administered	123	100%
Returned	84	68.29%
Valid Cases	**84**	**68.29%**

The response rate of 68.29% was significantly high. According to Saunders *et al.*, [22] response rates of 35-40% are adequate for academic studies to make generalizations on the population of the study. Therefore, the response rate of 68.29% was adequate to drive generalizations on the whole population

Demographic Characteristics of the Tour Operators

This section presents an overview of the background information of the sampled tour operators. The demographic characteristics described, cover the following factors:

- Tour operators ownership category,
- Type of tour operator,
- Number of years in operation,
- Number of employees,
- Number of touring vehicles owned, and
- Other types of equipment used

The tour operators were segmented relative to their type of company ownership. This was important as it gave an indication of the type of investor that is involved in the tour operating business in the country. The results of the findings are presented in Table 4 below:

Table-4: Ownership category

Ownership category	% of total sample
Family owned	49%
Shareholder owned	35%
Partnership owned	16%
Total	100%

The results show that almost half (49%) of the tour operator enterprises are family owned, 35% shareholder- owned and 16% owned by partners. This finding is a normal characteristic of the nature of tour operator enterprises in most developing countries [10].

The respondents were also segmented relative to the type of their operations, that is, whether they were inbound, outbound, or a mixture of both. The results presented in figure 1 below, show that 48.8% of the sampled- tour operators were inbound. This was followed by 46.3%, who were both inbound and outbound. The other categories were rather insignificant, with exclusive outbound operators being 1.2%, while other types constituted 3.7%.

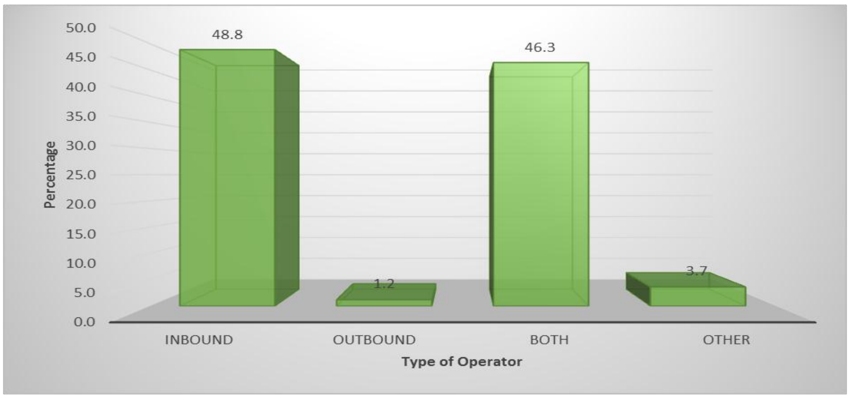

Fig-1: Types of tour operators

The category 'other' was mainly made up of special interest- tour operators whose businesses focus on niche markets like weddings and domestic meetings and conferences. Given that 48% of the tour operators indicated that they undertook inbound operations and that 46% indicated that they undertook both inbound outbound touring activities it meant that tour operations were dominated by incoming business, i.e. tourists coming from other countries into Zimbabwe. The majority of international tourists source information for potential holiday destinations through information communication technologies. Therefore, in order to access the international markets, tour operators need to use ICTs in their business operations.

The tour operators were requested to indicate the number of years they had been in business in the sector. This helped to ascertain the general sustainability of their operations. Figure 2 below, shows the percentage of the categories of the number of years tour operators have been in existence in the tourism sector in the country.

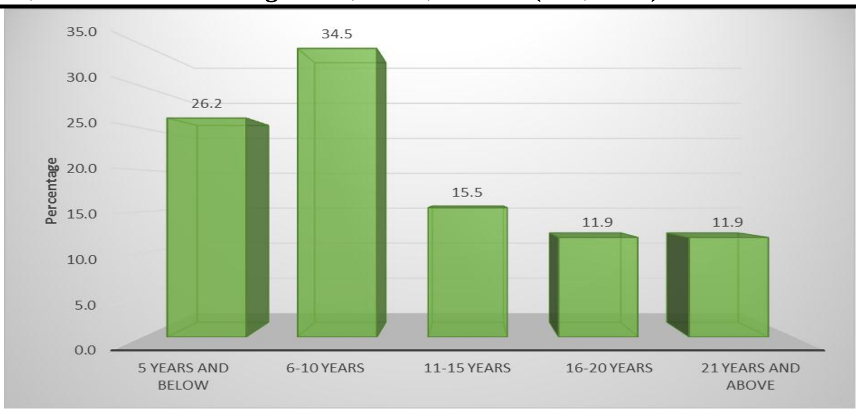

Fig-2: Number of years in operation

The largest number of the tour operators, (34.5%), had been in existence for 6-10 years. This is followed by relatively newly established enterprises of 5 years and below which make up 26.2% of the sample. On the one hand, 15.5% of the tour operators had been in existence for 11-15 years. On the other hand 11.9% of the tour operators had been in existence for 16-20 years. Further, another 18.9% had been in operation for 21 years and above. In other words, the cumulative frequency of the organizations which had been set up for 10 years or less was 60.7%, whereas those that had been set up for more than 10 years were 39.3%.

The dominance of companies with ten years and less in operation (60.7%) pointed to limited knowledge and experience of the tourism sector and hence, lack of competitiveness. It is also indicative of high business mortality in the subsector.The findings are comparable to those of Kanjuri [23] in Tanzania who indicated that 40% of his respondents indicated that they had been in business for less than five years. Besides showing that the majority of the tour operators are newly established businesses, the results further showed that there was a high business mortality rate in the sector. The high business mortality rate was a result of a number of factors, for example, a large number of the entrepreneurs were attracted by the glamour of the tourism industry without fully understanding the nature and characteristic of the sector.

The respondents were requested to show the number of employees in their companies. The information was useful for giving insights into the employment characteristics of the tour operating companies in the country. Figure 3 below shows number of employees of different categories of the tour operating companies. The figure shows that 47.6 % of the companies had five employees or less, 29.8% employed 6- 10 workers and that 8.3% had more than 25 employees. Further, the graph shows that 3.6% of the companies had 16-20 and 21-25 employees respectively.

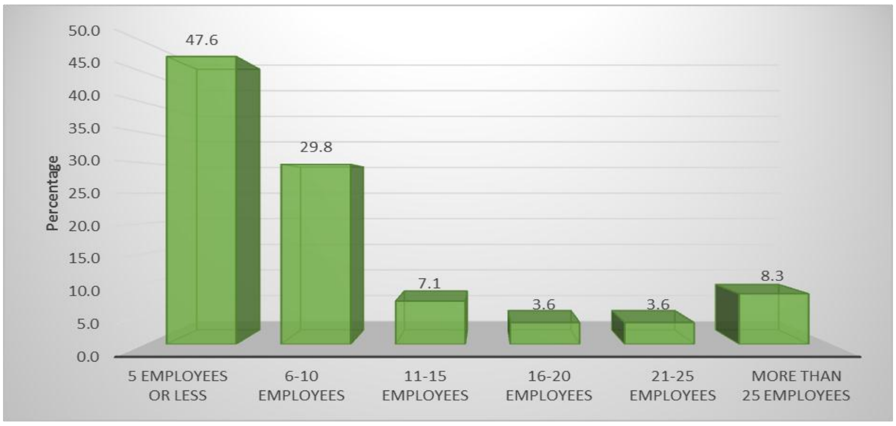

Fig-3: Number of employees

The overall outcome of the findings is that the majority of tour operators in the country, 77.4% (47.6%-five employees or less+29.8%-six to ten employees) employed a maximum of 10 employees whilst only 22.3% (7.1%-eleven to fifteen employees +3.6%-sixteen to twenty and twenty one employees +3.6%-twenty one to twenty five employees+8.3%-more than twenty five employees) employed 11 people and above. This is in line with the ownership characteristics of these enterprises whereby the majority of them, 49%, are family owned businesses.

The employment characteristics of the tour operators' sample was also in line with the trends that obtain in other developing countries [8, 18]. In a study in Ethiopia, Demeke [24] posits that 68% of the tour operators sampled, employed less than 10 people. The size and ownership of the tour operating enterprises have inherent challenges with regard to adoption of information communication technologies. Firstly, the owner who is usually the head of the family is often rooted in old ways of operating the business and is therefore not usually enthusiastic in introducing ICTs in the operations of the company. Trust in information communication technologies is often limited. Mgijima and Flowerday [20] stated similar views with regard to the outcome of their study in South Africa. Secondly, financial institutions are reluctant to advance funds to SMEs as they are perceived as high risk organizations because of their inability to offer appropriate collaterals for the funds borrowed. Finally, as family operated enterprises, information communication technologies skills and knowledge were often limited and hence there was no incentive to introduce information communication technologies in the business.

Respondents were further asked to indicate the number of vehicles they had on their fleet. It was important to ascertain the number of vehicles that the operators owned because the tour operations business is centred on the movement of clients. This involves activities like transfer of clients from airports to hotels, taking clients on game drive activities and transfer of clients from hotels to centres of water- based activities. The number of vehicles owned by an operator is therefore indicative of the overall size of the company's business. Figure-4 below, shows the outcome of the findings.

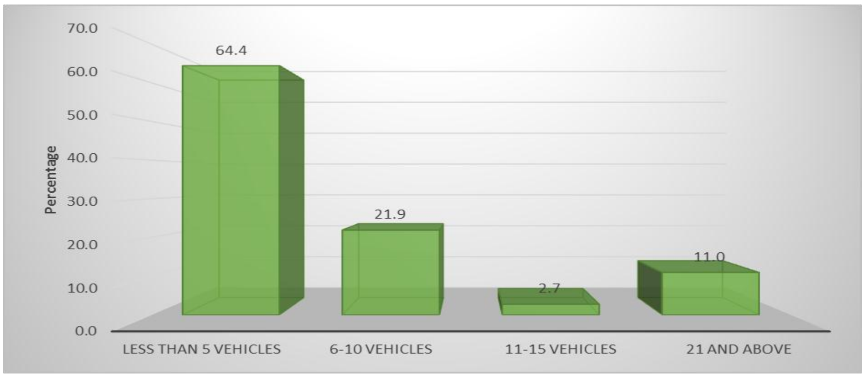

Fig-4: Number of touring vehicles owned by the tour operators

The majority of the tour operators,(64.4%,) owned less than 5 tour operating vehicles, 21.9% of the operators owned 6-10 vehicles, 2.7% owned between 11-15 vehicles and 11% owned 21 vehicles and above. In essence 86.3% (64.4%- owned less than five vehicles+21.9%-owned six to ten vehicles) of the tour operating companies owned 10 vehicles and below. It is however, significant that 11% of the companies owned 21 vehicles and above. This indicated the presence of medium- sized enterprises within the sample which is a reflection of the 35%, shareholder ownership of the enterprises presented in Table-5.3**.**

The respondents were also asked to indicate the other types of equipment they used besides vehicles to serve the needs of their clients. This was important as it gave an indication of the range of products and services that the enterprises offered. The aggregate findings are presented in Table-5 below:

Table-5: Other touring equipment for services owned by tour operators in Victoria Falls

Other equipment used	Operators using the equipment
Cruise boats	32%
Helicopters	20%
White-water rafting boats	16%
Canoes	15%
Other	17%
Total	**100%**

Cruise boats are used to take clients on game viewing on the Zambezi River whilst helicopters are used for viewing the Victoria Falls from the air. White-water rafting boats take clients on rafting adventures on the Zambezi River below the Victoria Falls Bridge. Finally, canoes are used for taking clients on a leisurely game viewing tours on the Zambezi River above the Victoria Falls.

The most common form of equipment used were cruise boats, (32. %), followed by helicopters, (20%). White-water rafting boats were used by 16% of the tour operators whilst 15% of them use canoes. The category "other" (17%) includes equipment like micro lights, bicycles and quad bikes. Ownership of equipment, especially touring vehicles, is important for touring companies because it gives them flexibility on costing of their services as well as ability to guarantee their product offerings.

Perceived and expected benefits of using ICTs

In an endeavour to gauge the overall appreciation of tour operators of using information communication technologies as a key tool for their future business operations, it was decided to analyze their perceived and expected benefits of the use of ICT.

In order to establish the perceived benefits of using ICTs in business operations, the respondents were asked whether a large proportion of their sales were generated through the internet and their respective websites. The summary of the findings are presented in the figure 5 below.

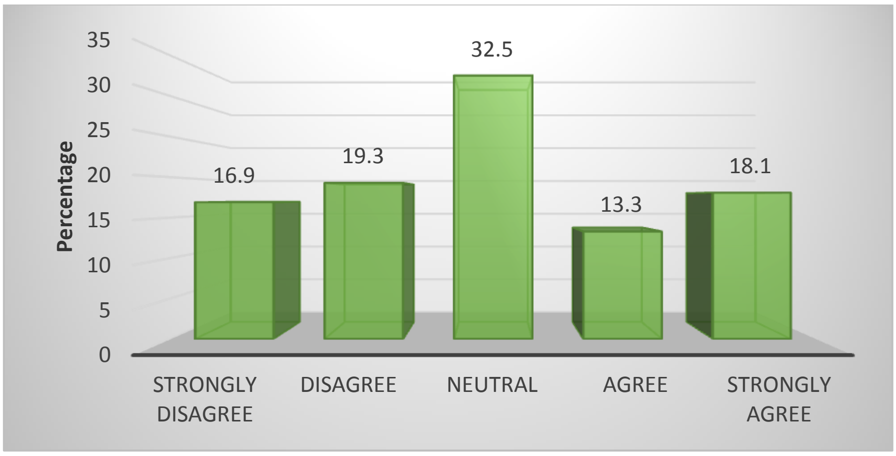

Fig-5: Generation of sales using ICTs

The results showed that 32.5% of the respondents were neutral on whether the majority of their sales were being generated through the internet, 16.9% strongly disagreed, and 19.3% disagreed. Further, the results showed that 13.3. % of the respondents agreed and 18.1% of them strongly agreed that they generated the majority of their sales through the internet and their websites. Those who agreed had a cumulative total of 31.4 %, (13.3%, +18.1%), while those who disagreed had a cumulative total of 36 % (16.9%, +19.3%). In principle, those who disagreed were more than those who agreed.

In an endeavour to establish the possibility of adoption of ICTs in future in their enterprises the respondents were asked whether the internet was going to be their main product distribution channel in the future. They were asked to rate the variables using a 5 point Likert scale with;

1. Representing strongly disagree;
2. Representing disagree;
3. Representing neutral;
4. Representing agree; and
5. Representing strongly agree.

Figure-6 below shows the expected future use of the internet for product distribution by the respondents.

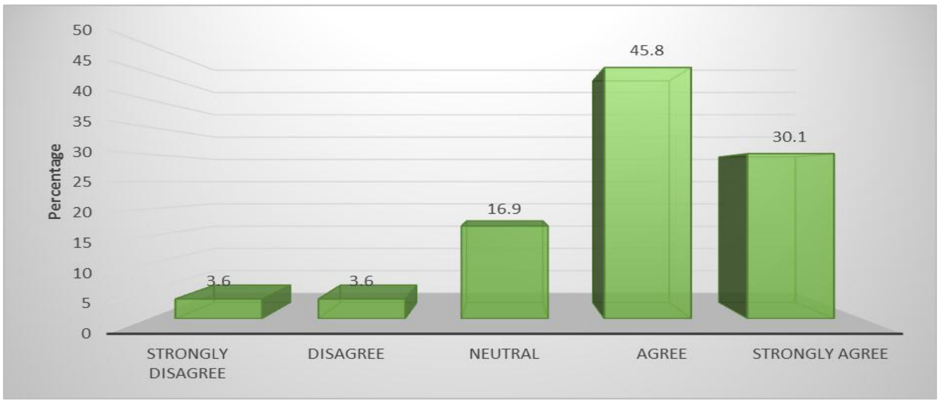

Fig-6: Expected future use of the internet for product distribution

Figure-6 shows that 45.8% of the respondents agreed that the internet was going to be their main future product distribution channel followed by 30.1% who strongly agreed that they were going to use the internet as their main product distribution channel in future. Further, 16.9 % of the respondents were neutral, while merely 3.6% strongly disagreed and disagreed respectively. Cumulatively, 7.2% of the respondents disagreed whilst 75.9% of the respondents agreed to the potency of the internet as their future distribution channel.

CONCLUSION

The Zimbabwean tour operating sector is dominated by small family owned businesses which have been slow in adopting information communication technologies. In view of the dramatic increase in the use of internet by tourists globally it is essential that the country's tour operators adopt ICTs in their operations otherwise they risk closing down due to lack of customers.

RECOMMENDATIONS

It is recommended that the Zimbabwe Tourism Authority organises an ICT awareness training programme for tour operators so as to facilitate their appreciation of the role of information communication technologies in their business operations.

It is further recommended that the Zimbabwe Council for Tourism identifies online short term courses on the use and role of information communication technologies and encourage to operators to enrol on them. This will help to broaden the horizons of the tour operators on the importance of use of ICTs in their enterprises.

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