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Matching Tourist Products to Markets: an Assessment of Zimbabwean Tour Operators

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Abstract

The use of the internet by tourists has meant that tour operators in developing countries such as Zimbabwe have to closely match their products to the market in order for them to survive in the market place. It is also imperative for the tour operators to use information communication technologies to distribute their products. The purpose of the study was to assess the type of products that the Zimbabwean tour operators were offering and how the operators matched these products to the needs of the markets. The study further assessed how far the tour operators were using the internet to distribute their products. The quantitative method was adopted using the survey design to gather data from the field. Self-administered structured questionnaires were distributed to the sample population in Harare and Victoria Falls. The results showed that products offered included adventure tours, canoeing safaris and cultural tours. The international markets served included South Africa and Britain. The majority of the tour operators did not use the internet to distribute their products. The article recommended that the tour operators target niche markets for their product offerings.

Keywords: Tour Operator, Internet, Products, Markets, Zimbabwe, Marketing

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Introduction

A tour operator is an organization that purchases different components of the tourist product from principals and consolidate them into one holiday package (Holloway &Robson, 1995). The availability of large amounts of information on the internet about holiday products has enabled tourists to search for holiday products that meet their specific needs. Zimbabwean tour operators therefore need to make sure that they provide holiday products on their websites that meet the needs of their potential customers. The majority of tour operators in Zimbabwe have historically offered generic holiday packages to the market with limited focus on market segmentation (Tsoka; 2014). Globally tourists are searching for holiday products that meet their specific needs (Cavlek, 2013, Servani and

Elmazi, 2008:24).They therefore seek information from websites of tour operators whose product offerings match their holiday needs. The almost universal use of the internet by potential tourists to search for holiday information before they make a decision to purchase their holiday (Fortis *el al,* 2014) means that tour operators, including those in Zimbabwe need to offer holiday products that meet market needs. Zimbabwean tour operators therefore need to undertake adequate market research in order to be in a position to offer holiday packages that the local and international tourists are looking for. Zimbabwean tour operators are offering holiday products that are determined by the basic tourist attractions found in the country. The current tourist is searching for products that match their specific holiday needs (Buhalis, 2013). The Zimbabwean tour operators need to be innovative in their product offering so that they are able to attract the discerning tourist of the 21st century. Failure to offer products that the different market segments are searching for will result in business decline and eventual demise of the local enterprises. The purpose of the study was to identify the type of holiday products that Zimbabwean tour operators were offering to the market with a view of ascertaining how for the products were matching the needs of potential customers.

Literature Review

The internet through the World Wide Web gives the tourist the opportunity to search for information for planning the holiday trip, compare prices of different products and book and pay for the holiday without moving from his house (Elci *et al*, 2017). Accessibility to a wide range of tourism information is enabled by the fact that most of the information on the websites is free of charge.

The current tourist is an experienced traveller who is constantly connected to the email and social networks and uses multichannel devices to search for holiday information and for making bookings (Salvador: 961). Tour operators therefore need to make sure that their product offerings are innovative, competitive and meet the needs of different market segments they serve.

The need to match the product offered to the needs of the traveller is now a key issue even at national destination level (Sinitsyn, 2017). Countries can no longer afford to rely on their traditional attractions to be competitive in the global market (Lohman, 2016). Product developments which are guided by market research are a major trust of governments' tourism development strategies globally (Gov. of South Africa; 2016, Gov. of Kenya; 2018).The situation is therefore more challenging for local tour operators who have to compete with international tour operators for the same potential customers in the source markets.

Zimbabwean tour operators have therefore to provide products that satisfy the demands of the market segments that visit the country from different countries in the region and overseas. Provision of appropriate holiday packages by Zimbabwean tour operators will ensures their long term sustainability as business enterprises.

Methodology

The quantitative approach was used to gather the data on the characteristics of the tour operating enterprises in Zimbabwe. The tour operators' characteristics included, among others: the products offered, the market segments served and the type of information communication technologies being used.

Study population

Before any company can operate in the country within the tourism industry it has to be registered by the Zimbabwe Tourist Authority (ZTA). The Tourism Act Chapter 14:20 of 1996 requires that tour operating companies annually renew their operating licences with the Zimbabwe Tourist Authority. The population of the study was made up of 202 registered tour operators in Zimbabwe. The study therefore used the current register of tour operators from ZTA as the sampling framework from which the sample population of tour operators based in study areas of Harare and Victoria Falls was drawn.

Sample population

The sample population for this study consisted of 123 registered tour operators in Harare and Victoria Falls. (Sekaran and Bougie; 2010:262; Tshuma and Mafa, 2013). The tour operators included in the study were randomly selected from the ZTA list of registered companies. The total number of tour operators from each area reflected the proportional distribution of the tour operators (Harare, 67%, Victoria Falls, 33%; (ZTA).

Harare was chosen because, being the capital city of the country, it has the highest concentration of tour operating companies in Zimbabwe (ZTA, 2014). Harare also attracts a large number of new entrants to the sector. Data obtained from tour operators in the city gave a fair representation of the characteristics of tour operating enterprises in other parts of the country. Victoria Falls was also chosen because it is the current hub of tourism activities in the country. The type of products offered and markets served by tour operators in the resort town was a good pointer to the situation obtaining in the whole country.

General data on the characteristics of tour operators in Harare and Victoria Falls was gathered through self-administered questionnaires which were distributed to all the selected enterprises in the two towns. The questionnaires were completed by the senior managers of each tour operating company.

The researcher physically distributed the questionnaires to the Harare respondents. The respondents were given a week to complete the questionnaire after which they were collected from the enterprise's premises by the researcher. Questionnaires for the Victoria Falls respondents were sent by courier services to the physical addresses of each company. The researcher visited the Victoria Falls resort and collected the questionnaires from the enterprises concerned.

The questionnaire was pre-tested in Harare and adjustments to the wording and flow of the questions were made before the launch of the study. Factor analysis was used in order to highlight the underlying relationship between the measured variables in the study.

Results

Reliability Analysis

In order determine the reliability of the questionnaire that was used for the collection of data, the Cronbach's alpha for the 84 questionnaire items were analyzed and resulted in an alpha value of 0.768. The Cronbach Alpha, according to Nunally (1978), is the *de facto* standard for the instrument reliability and internal consistency. Despite the variable thresholds for reliability, depending with the nature of the study, the generally tolerable minimum threshold is 0.70. As alpha statistic of 0.768 is greater than 0.70, it is therefore concluded that the instrument was internally consistent, and hence reliable.

Response Rate

Out of the 123 questionnaires that were distributed, 84 were successfully completed and returned. Table 1 shows the response rate of the questionnaires.

Table 1: 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*, (2012: 269) 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.

The largest number of respondents (60%) was based in Harare, as compared to those who were based in Victoria Falls (40%). This was in line with the general distribution of the sample population whereby Harare based tour operators made up 67% of the sample with Victoria Falls tour operators constituting the remaining 33%. The Victoria Falls sample had a comparatively higher response rate (80%) compared to that of Harare (62%). This was mainly because the majority of tour operators in Victoria Falls were enterprises that own and use their own equipment. Harare has a large number of 'briefcase' tour operators, a substantial number of whom did not complete the questionnaire. These tour operators depend on their websites to sell their holiday packages. The majority of these tour operators do not operate from physical locations.

Tourism products and services offered

The respondents were asked to indicate the products and services that they offered based on a 3-point Likert scale, with;

- 1 representing never,
- 2 representing sometimes, and
- 3 representing always.

It was necessary to establish the products that the tour operators offered their customers. This helped to ascertain the range of products offered to the potential clients.
The rated results are presented in table 2 below:

Table 2: Tourism products and services

Products and services offered	**Mean**	**Standard Dev.**
1.River and Lake cruises	2.57	.631
2.Game viewing and sightseeing tours around Zimbabwe	2.54	.595
3.Adventure tours	2.41	.631
4.Cultural tours around Zimbabwe	2.40	.651
5.Canoeing safaris around Zimbabwe	2.27	.678
6.Walking safaris	2.25	.724
7.Weddings and honeymoon packages	2.15	.673
8.Conference and incentive packages	2.12	.640

9.School trip packages	2.02	.796

River and lake cruises were the dominant product offered with a mean of 2.57, followed by game viewing and sightseeing tours around Zimbabwe which had a mean of 2.54. The respondents offered all the above products as is shown by the lowest mean of 2.02 out of a 3 points on the Likert scale.

In order to get an in-depth understanding of the findings, Factor Analysis was done using the Principal Component Analysis (PCA) as the extraction method. Benchmarking against the minimum eigenvalue threshold of 1.0 analysis was done and the results are as shown in Table 3 below.

Table 3: Total Variance Explained - Tourism Products and Services

Component	Initial Eigenvalues			Extraction Sums of Squared Loadings			Rotation Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	3.630	40.336	40.336	3.630	40.336	40.336	2.923	32.482	32.482
2	1.711	19.011	59.347	1.711	19.011	59.347	1.995	22.162	54.643
3	1.413	15.704	75.051	1.413	15.704	75.051	1.837	20.408	**75.051**
4	.634	7.050	82.101						
5	.500	5.551	87.652						
6	.448	4.976	92.628						
7	.295	3.277	95.905						
8	.213	2.362	98.267						
9	.156	1.733	100.000						

Extraction Method: Principal Component Analysis.

Three components were extracted, and these were attributable to 75% of the variation in the established factors shown in Table 4 below. Component 1 (40.336% variance) comprised of 4 items, while Component 2 (19.011% variance) comprised of 2 items, with Component 3 (15.704% variance) comprising of 3 items.

Table 4: Rotated Component Matrix - Tourism Products and Services

	Component		
	1	2	3
1.River and lake cruises	.890		
2.Cultural tours around Zimbabwe	.804		
3.Adventure tours	.801		
4.Game viewing and sightseeing tours around Zimbabwe	.797		
5.Canoeing safaris on the Zambezi		.884	
6.Walking safaris		.856	
7.Conference and incentive packages			.830
8.Weddings and honeymoon packages			.746
9.School trip packages			.695

Extraction Method: Principal Component Analysis.

Using the outcome of the factor analysis the products and services offered by the tour operators can be classified into three categories: primary, secondary and other. The primary products and services (component 1) offered by the tour operators were:

- river and lake cruises;
- adventure tours;
- cultural tours around Zimbabwe;and
- Game viewing and sightseeing tours around Zimbabwe.

The secondary products and services (component 2) offered were:

- canoeing safaris on the Zambezi; and
- walking safaris.

The third category of products and services (component 3) offered were "other" which comprised of:

- weddings and honeymoon packages;
- conference and incentive packages; and
- school trip packages.

The outcome of the component analysis shows that tour operators offer three main holiday products to potential clients as indicated in table 4.

Tourist Markets

The respondents were asked to indicate the main source of their businesses utilizing three categories; domestic, regional and international markets. The study sought to establish the source markets of the tour operators and how the tour operators attempted to match their products to the different markets. The results are presented in Table 5 below:

Table 5: Main source of business

Main source of business	Responses of sampled tour operators
Domestic market	30%
Regional market	25%
International	24%
Indifferent	21%
Total	**100%**

Table 5 shows that 30% of the tour operators received most of their business from domestic clients, 25% from regional markets, 24% from international markets and 21% were indifferent. The 21% of the respondents implied that there was no consistency in terms of their core source of business. They experienced changing composition of their market mix depending on the political and economic outlook in the country, in the region and internationally.

With regard to the international markets, the respondents were asked to rate the relative importance of each international source market on a 5 point Likert scale with:

- 1 representing unimportant;
- 2 representing low importance;
- 3 representing neutral;
- 4 representing important; and
- 5 representing very important.

International tourists mainly use information communication technologies to purchase their holiday packages. Therefore, the importance that the tour operators attached to the international markets gave an indication of the level of the challenge that they faced in selling their products to international tourists. This is in view of the tour operators' reluctance to use ICTs for the distribution of their products.

The source markets rated were South Africa, Britain, Germany, Rest of Europe, USA, China, Japan, Rest of Asia, Australia and Canada. Table 6 below summarizes the ratings of the respondents.

Table 6: International markets relative importance

Market	Mean	Standard Deviation	Skewness
1.South Africa	4.34	.971	-1.733
2.Britain	4.12	1.076	-1.410
3.USA	4.01	.993	-.688
4.Rest of Europe	3.97	1.019	-1.157
5.Germany	3.9	.939	-.522
6.Australia	3.58	1.140	-.542
7.Japan	3.41	3.58	1.003
8.China	3.3	1.003	-.105
9.Canada	3.23	1.385	-.222
10.Rest of Asia	3.03	1.026	.323

From Table 6 it is clear that most of the tour operators generated their business from South Africa. The source market had a relatively high mean rating of 4.34 out of 5 on the Likert scale. The importance of this source market was further qualified by the relatively low standard deviation of 0.971 which indicated limited dispersion of respondents' rating of the source market. Britain, with a mean rating of 4.12 was identified as the second most important international source market with United States of America and the Rest of Europe as the third and fourth important international markets. The least rated source of business was, China with a mean rating of 3.31 followed by Canada, with mean rating of 3.23 and Rest of Asia with a mean rating of 3.03.

Table 6 further indicates that importance given to a number of source markets varied between the sampled tour operators. These markets included China with a skewness statistic of -0.105, Japan with a skewness statistic of 0.102, and Canada with skewness statistic of- 0 .220.

In order to establish the relative importance of the different source markets, factor analysis was again computed, using the PCA as the extraction method. Table 7 below shows the results of the factor analysis.

Table 7:Total Variance Explained - Tourism Markets

Component	Initial Eigenvalues			Extraction Sums of Squared Loadings			Rotation Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	5.334	53.336	53.336	5.334	53.336	53.336	3.137	31.366	31.366

2	1.265	12.648	65.984	1.265	12.648	65.984	2.548	25.479	56.844
3	1.047	10.467	76.452	1.047	10.467	76.452	1.961	19.607	**76.452**
4	.831	8.308	84.759						
5	.516	5.162	89.921						
6	.384	3.838	93.759						
7	.227	2.266	96.025						
8	.177	1.768	97.792						
9	.128	1.283	99.076						
10	.092	.924	100.000						

Extraction Method: Principal Component Analysis.

From the above analysis, three components were extracted, which collectively accounted of 76.452% of the variation in the established factors shown in Table 8 below. Component 1 (53.336% of the variance) comprised of 5 source markets,(Britain, Rest of Europe, Germany, Japan and South Africa).Component 2 (12.648% of the variance) comprised of 3 source markets(Canada, United States of America and Australia. Finally component 3 (10.467% of the variance) comprised of 2 source markets (China and the rest of Asia).

Table 8: Rotated Component Matrix - Tourism Markets

	Component		
	1	2	3
Britain	.852		
Rest of Europe	.844		
Germany	.761		
Japan	.609		
South Africa	.537		
Canada		.837	
USA		.781	
Australia		.774	
China			.883
Rest of Asia			.828

Extraction Method: Principal Component Analysis.

Using Table 8 the tour operators' markets can be classified into three categories; primary, secondary and other. The primary source markets (component 1) for the tour operators were:

- Britain;
- Rest of Europe;
- Germany;
- Japan; and
- South Africa.

The five source markets have historically been the areas from which the tourists to the country have originated. Tour operators in the country have therefore continued to target these source markets for their business.

The secondary source markets (component 2) were:

- Canada;
- USA; and

- Australia.

Both the USA and Australia have been significant source markets for the country in the past with the United States of America experiencing substantial growth in recent years, (ZTA; 2016). Tour operators have therefore endeavored to increase their market share of tourists from these countries.

The “other” source markets (component 3) were:

- China; and
- Rest of Asia.

The majority of the tour operators paid limited attention to China and the rest of Asia as source markets. The main reason for this limited interest in these source markets is tour operators’ lack of understanding of the products needs of these tourists. There has been limited market research in these source markets at national level hence the tour operators’ limited interests in the two source markets (ZTA, 2016).

The tour operators’ perceptions of the significance of the different markets have implications on how they partner with other stakeholders in the tourism industry in the marketing of the country as a tourist destination. They also have implications on their competitiveness in those different markets in view of their level of use of information communication technologies for the distribution of their products and services.

Use of ICTS by Zimbabwean Tour Operators

ICTS being used

In order to ascertain the range of ICTs being used in the tour operating enterprises, the respondents were asked to list the ICTs that they were using in their organizations. They were further asked to rate their usage, on a 3-point Likert scale, with:

1. Denoting never;
2. Denoting sometimes; and
3. Denoting always.

The listing and rating of the different information communication technologies helped to establish the level of ICT adoption by the tour operators as well as the relative importance they attached to the use of information communication technologies in their enterprises.

The summary statistics are presented in Table 9 below:

Table 9: Types Of Icts Being Used By Tour Operators

ICT variable	Mean	Standard Deviation	Friedman Rank Analysis
Internet	3.00	.000	1
Desktops	2.9	.286	2
Laptops	2.77	.423	3
Websites	2.75	.514	4
VOIP e.g. Skype	2.54	.571	5
Intranet	2.53	.649	6
Social media	2.53	.654	7
Integrated server	2.23	.915	8
Global distribution system	2.21	.998	9

Table 9 shows that the tour operators used a total of 9 forms of ICTs with the internet being the most popular and the global distribution system being the least popular. The dominance of the use of the internet is a reflection of the high level of internet penetration that has occurred in the country in recent years and tour operators have also jumped onto the bandwagon of internet adoption (Tsoka and von Solms, 2013).

External Use Of Icts

In order to find out the extent of external usage of information communication technologies by the tour operators, the respondents were asked to rate a number of variables on a 5-point Likert scale with:

1. Representing very poor;
2. Representing poor;
3. Representing neutral;
4. Representing good; and
5. Representing very good.

The variables considered were the following:

- providing information to customers;
- distribution of company tour packages and other products;
- advertising company products;
- networking with suppliers and partners;
- e-commerce activities; and
- receiving payments from clients.

The summarized statistics from the analysis are presented in the Table 10 below.

Table 10: External Usage Of Icts

ICTs external usage	Mean	Standard deviation	Friedman Rank Analysis
Distribution of company tour packages	4.54	.828	1
Providing information to customers	4.43	.854	2
Networking with suppliers and partners	4.25	.758	3
Advertising company products	4.20	.991	4
Receiving payments from clients	3.58	1.319	5
E-commerce activities	3.43	1.133	6

Table 10 shows that the primary external usage of ICT was for the distribution of company tour packages. The variable had a mean rating of 4.54 and a standard deviation of.828. The second rated external usage was for providing information to customers, with a mean of 4.43, and a standard deviation of .854. The third rated external usage was for networking with suppliers and partners with a mean rating of 4.25 and a standard deviation of 0 .758. The fourth placed external usage was advertising company products with a mean rating of 4.20 and a standard deviation of 0 .991.The least rated external uses of ICT were for receiving payments from clients and e-commerce activities which had mean ratings of 3.58 and 3.43 respectively. These two uses were further characterized by very high standard deviations of 1.133 and 1.319 respectively.

The Friedman Test buttressed the statistical significance of the rankings of the external usage of ICTs as indicated in table 10 above. The primary external use of ICTs by the tour operators was for the distribution of company tour packages and providing information to customers whose overall rankings were 1 and 2 respectively. On the other hand, the least external uses of ICTs by tour operators were receiving payments from clients and e-commerce activities whose overall rankings were 5 and 6 respectively.

Matching Tourist Products to Market Demands

The products offered by tour operators were in response to market demand. The majority of tourists to Southern African countries travel to the region in order to view wildlife. Cultural tours offer the international tourists incremental value to their holidays because they help them to experience other cultures. A number of the tourists also add adventure activities to the wildlife products. Hence the majority of the tour operators offer a combination of these core products to the potential travelers.

Table 2 above shows that tour operators further offer soft adventure activities like walking safaris and cruising safaris on the Zambezi. Finally the table shows a number of special interest products like conference and incentive tours being also offered by the tour operators. Although these special interest products are globally very profitable the Zimbabwean tour operators do not offer them as their core products. This is mainly due to the fact that the country does not have adequate infrastructure to cater for the needs of this type of market segment.

Zimbabwean tour operators faced stiff competition from South African and international tour operators for all their Victoria Falls based products. This was a result of several developments that had occurred in the country during the past two decades. Firstly, Zimbabwe lost its hub position to South Africa in the early 2000 as the majority of international airlines stopped direct flights to the country and relocated to South Africa. The direct result of this was the loss of control of product consolidation by local tour operators to South African operators. Secondly, Zimbabwe had become an appendix destination to South Africa and was being sold as an add- on attraction to South Africa. Thirdly, international tour operators were either packaging the destination independently and distributed their holiday packages to clients through the internet or were partnering with South African tour operators to sell the Zimbabwean holiday packages.

In order to fight both international and South African competition Zimbabwean tour operators need to effectively segment their markets and offer products that match the demands of the identified segments. They further need to distribute their products to the potential customers through the virtual platforms that are now commonly used by potential tourist to purchase their holidays. These include among others, websites, facebook, twitter and You Tube.

The conference and incentive market segments source and purchase their tourist products through the traditional distribution channels. This is due to the fact that conference and incentive buyers require face to face interactions with product providers. Internationally, the conference and incentive market segment has experienced tremendous growth in recent years (Katsitadze& Natsvlishvili, 2017; Portland, 2018). It would therefore have been expected that tour operators in Zimbabwe prioritized the conference and incentives market in their product offerings. However, the study clearly showed that this was not the case. This was mainly due to the fact that the market segment was very competitive and it demanded high quality products and services. Tour operators therefore, avoided focusing on the market segment because of the country's poor tourist infrastructure, limited products and lack of skilled manpower.

Markets Characteristics

The domestic market constituted the largest source of business for the majority of the tour operators in Zimbabwe. In most cases, the domestic market preferred to purchase holiday products directly through the tour operator. The domestic market was mainly composed of the business market, mainly delegates on conferences and workshops which were held in the country's tourist's resorts like Victoria Falls, Kariba, Nyanga or Masvingo. There was a preference to have direct interactions with tour operators rather than sourcing the products through the internet. This was a result of the fact that the organizers of the conferences from government, the private sector and non-governmental organizations needed to establish personal relationship with service providers in order to ensure the success of their events. The traditional product distribution method that was preferred by the local tour operators was therefore an appropriate way of selling the holiday products to the domestic business market.

Given the continued deterioration of the country's economy, the domestic business market segment will in due course suffer from the same shrinkage that the domestic leisure market has experienced in the country. Shrinkage of the domestic business market has also been affected by the scaling down of activities by a number of non-governmental organizations in the country. Tour operators will therefore need to focus more on increasing their market share of the regional and international tourist markets if they are to remain viable in the current economic environment. The tour operators will also need to effectively use information communication technologies as these customers mainly use virtual platforms for purchasing holiday products.

The most important international markets for the country's tour operators were composed of the following: South Africa, Britain, Germany, Rest of Europe, USA, China, Japan, Rest of Asia, Australia and Canada. South Africa constituted the largest source of business for most of the tour operators. The dominance of the South African market was partly as a result of the geographical location of the country and partly as a result of partnership arrangements that Zimbabwean tour operators had entered into with South African tour operators. Zimbabwe's geographical proximity, its historical, cultural, political and economic ties with South Africa, meant that a large proportion of holiday makers in that country were familiar with Zimbabwe's tourist attractions. South African tourists therefore were able to make direct bookings for holidays through Zimbabwean tour operators.

South African tour operators required partners on the ground in Zimbabwe to handle their clients. Zimbabwean tour operators were therefore contracted to carry out airport to hotel transfers, game drive activities and any other touring services that the clients would have bought in South Africa. However, for the long term the Zimbabwean tour operators need to focus more on increasing direct bookings from South African tourists rather than relying on South African tour operators for their customers. This is strategically important because with the government encouraging foreign direct investment, (FDIs) in different sectors of the economy including tourism, there is a strong likelihood of South African tour operators establishing their own branches in Zimbabwe so that they can directly services their own clients. Already, companies like Thompson Tours and Wilderness Safaris have established branch offices in Victoria Falls. Zimbabwean tour operators who used to handle clients from these companies have seen their client base reduced overnight.

Outside South Africa, three groups of markets emerged and were categorized as primary, secondary and tertiary. The primary group was made up of Britain, Germany, the Rest of Europe and Japan. These markets were identified as major sources of business by the respondents. The secondary source markets were composed of the United States of America, Australia and Canada. The third group of source markets was composed of China and the Rest of Asia.

The majority of potential customers from the three sources markets mainly use information communication technologies for sourcing general information about holiday destinations as well as for sourcing specific holiday products (Portland, 2018). In view of the fact that Zimbabwean tour operators identified these areas as core sources of business, it therefore means that their products have to be available on the internet from which these customers are buying their holiday packages. Failure to properly respond to market demands for availing the products on virtual platforms may result in the potential customers purchasing their holiday needs from the source markets tour operators only.

The current international tourists are experienced travellers who are searching for experiential holidays (Arseneault, 2016). They demand opportunities whereby they are enabled to create their own holiday packages in the destinations they intend to travel to and ask tour operators to give them a price for their ideal holidays. This trend of customer behaviour is referred to as dynamic packaging (Altexsoft, 2018). The concept is described by Thangaraj and Manikandan (2011) as an innovative technology that allows automated online configuration and assembling of holiday packages for customers. This means that tour operators should offer possible holiday packages on the Internet from which the potential clients can create their specific holiday package. The poor quality of the websites of the majority of the country's tour operators, their limited interactivity and their poor navigability meant that the potential international tourists are unlikely to use them as sources for their holiday packages. The problem is exacerbated by the fact that only very few of the websites have language translation capabilities. The inability to offer the facility meant that the country's tour operators cut themselves from a huge non-English speaking global market.

The tour operators ranked Australia and Japan higher than China as source markets for their businesses. The perception was indicative of a lack of understanding on the part of the tour operators of the potential of the Chinese market. China was in 2017, the global number one outbound international tourist market (UNWTO; 2018) producing a total of 129 million tourists of which 3.3 million took their holidays in Africa (ibid). The Chinese travellers spent a total of US$257 billion, making the country the number one spender on holidays during the same year (UNWTO, 2018). Given the size of the Chinese outbound market and Zimbabwe's 'special' relationship with China including the Approved Destination Status, it would have been expected that this market would have received a higher rating from the respondents. However, the country has been receiving very limited numbers of Chinese tourists, for example, in 2017 Zimbabwe received a total of 14000 Chinese tourists (ZTA, 2018) whilst South Africa received 97000 million (SAT, 2018) and Mauritius hosted a total of 72 951 (Gov. of Mauritius, 2018).

Conclusion

The purpose of the study was to identify the type of holiday products that Zimbabwean tour operators were offering the market with a view of ascertaining how for the products were matching the needs of potential customers. The study revealed that Zimbabwean tour operators offer a wide range of holiday products to both the domestic and international markets. The products offered were determined by the available tourist attractions. The inability to offer holiday products matching the needs of specific market segments has resulted in international tourists buying their holiday products from international tour operators who offer them the products they are specifically searching for in the destination. The study further showed that the majority of tour operators in Zimbabwe have not fully embraced information communication technology for product distribution and transacting. If the Zimbabwean tour operators do not fully embrace ICTs in their business operations they risk losing potential clients to international tour operators which package holidays to the country as the majority of them are ICT compliant in their activities. Finally the study highlighted the challenges that tour operators are facing as a result of their inability to offer tourists products that are demanded by different market segments. Long-term sustainability of the tour operators will depend on their ability to address this challenge as well as their ability to fully use information communication technologies in their daily activities.

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