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Product Distribution Model for Developing Countries's Tour Operators: Experiences from Zimbabwe

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Abstract:
Tour operators in developing countries including those in Zimbabwe still use the "traditional" model for distributing their products to the market. The purpose of this study was to assess the extent to which the Zimbabwean tour operators were still using the "traditional" product distribution model. Quantitative method was used to gather data for the study. The results indicated that the majority of the tour operators had adopted one form or another for the distribution of their holiday products. It further revealed that overall the majority of the tour operators still relied on the "traditional" model to generate sales. It is recommended that the tour operators adopt the use of the bimodal distribution model in order for them to ensure long term viability.

Keywords: *Tour operator, traditional, distribution, model, bimodal*

1. Introduction

The tourism value chain was for a long time dominated by tour operators who acted as wholesalers to the industry. Developments in information communication technologies and changes in product needs and characteristics of the consumer have, however, weakened the central position of the tour operator in product distribution in the tourism sector. Zimbabwean tour operators currently distribute their holiday products through tour operators in the source markets who add their own mark up to the original cost before selling the holiday packages to the consumer. The bimodal distribution model is based on the proposition that continued use of the "traditional" product distribution model by Zimbabwean tour operators is no longer appropriate and that the growth and sustainability of Zimbabwean tour operators requires a stronger direct interface with customers in the source markets. This interface depends on improved use of information communication technologies than is currently the case. The model will assist in enhancing the long-term sustainability of the country's tour operators in two ways. On the one hand, the tour operators will be able to generate business through their traditional links with source market tour operators and on the other hand, they will receive additional business through direct access to source market consumers through the use of internet platforms.

1.1. Background

The distribution value chain of the tourism product has witnessed a number of phases since the creation of the first package tour by Thomas Cook in 1845 (Yale, 1995). The three phases have witnessed the adoption of different models of business operations by tour operators. The phases can be categorized as follows:

- the era of tour operator dominance;
- the era of transition to information communication technologies; and
- the era of consolidation

The tour operator occupied a central position in the distribution of the tourist product. He was able to determine the types of product elements to be included in a holiday tour package and how the product was to be distributed. Tour operators were able to influence demand for hotels rooms, airline tickets and other facilities in the industry because of their ability to buy products and services in bulk and sell them as a single holiday package. Figure1 below shows the central position that was for a long time occupied by the tour operator in the tourism industry.

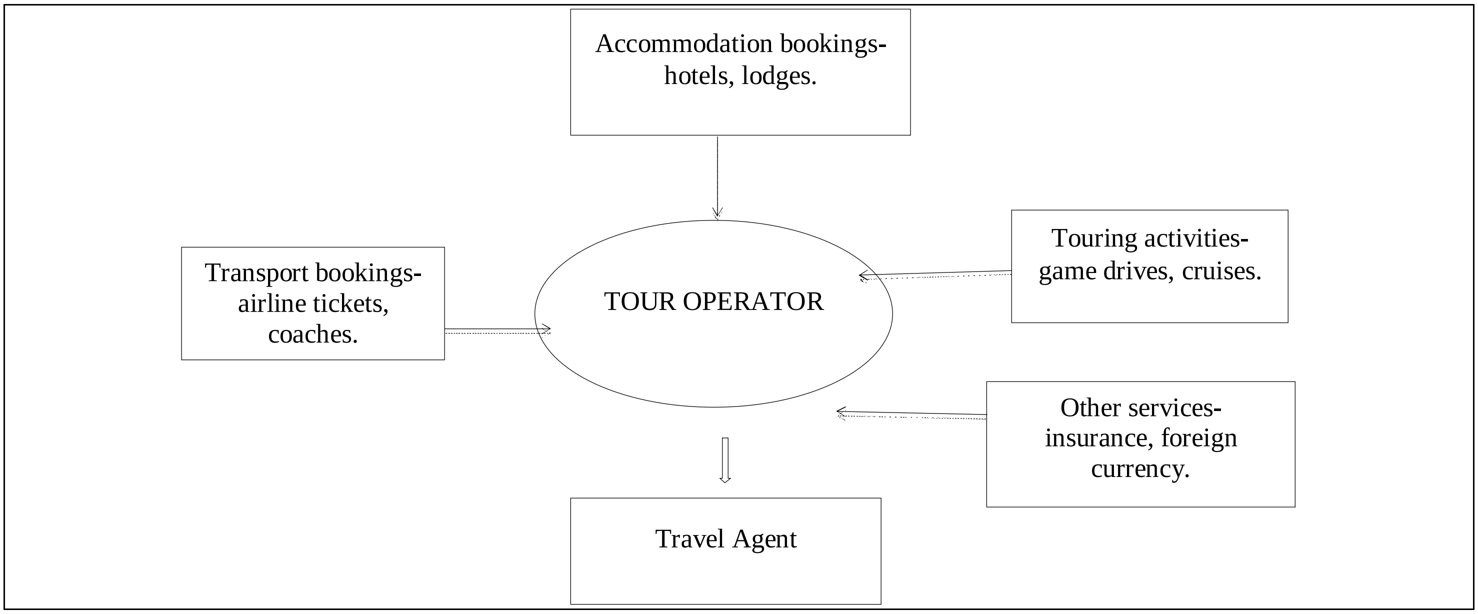

Figure 1: Position of the tour operator in the tourism and hospitality industry: adapted from Gauntas S.: (2005)

The tour operator purchased accommodation rooms in bulk from the principals under agreed contractual arrangements. The tour operators' ability to purchase rooms in bulk gave them strong price bargaining power which often resulted in them receiving discounted rates ranging between 20-30 % (Middleton 1994). Similarly, the tour operators purchase airline tickets, touring activities and other services in large quantities and were therefore in a position to determine the flow of business to the different suppliers in the tourism industry. Other services provided by the tour operator include insurance, medical cover and visas where these are necessary. At times, the tour operator also facilitates the purchase of travellers' cheques or foreign currency for the customers. The ability of the tour operators to source different products and include them in their tour packages gave them the competitive edge to lead in product innovation.

During the early years of tour operations, entrepreneurs like Thomas Cook, bought these different elements of the holiday products and created saleable holiday packages which were accessed by the consumers through the travel agent. In this arrangement, the product components and the price were determined by the tour operator. The consumer had very minimal opportunity for influencing the product elements to be included in the holiday package as well as the price at which the holiday packages were sold.

Figure 2 below shows the traditional tourist product distribution model.

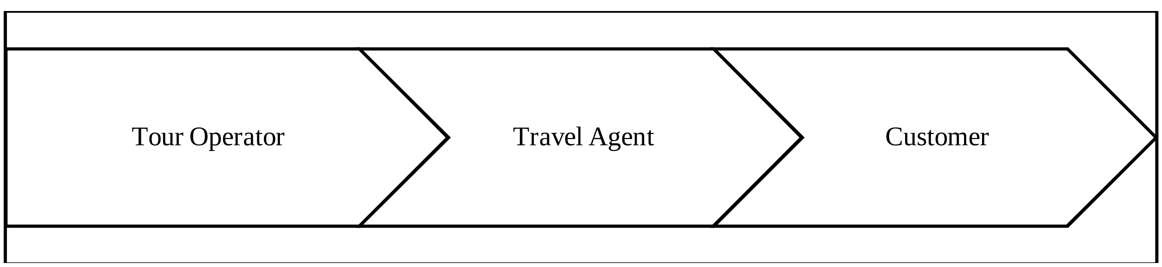

Figure 2: Traditional tour operator distribution model, adapted from Middleton, (1994: 204)

The traditional tourism product distribution model was viable due to a number of factors. Firstly, both the tour operator and the travel agent had an in-depth understanding of the products they offered and hence customers could rely on their advice on the type of holiday products to buy and the areas they could take their holidays. Secondly, the tour operator offered a complete holiday package and hence the customer did not have to search for the different elements of his or her holiday products.

The traditional role of the tour operator is clearly reflected in the definition by Yale (1995:1).

- A tour operator is a person or a company who purchases the different items that make up an inclusive holiday in bulk, combines them together to produce package holidays and then sells the final package to the public either directly or through a travel agent.

This definition attempts to highlight the role that is played by the tour operator in the tourism value chain. Developments in information communication technologies and their use in the tourism industry, however, have distorted the original understanding of the term "tour operator". The internet, for example, has brought about a new business environment which has enabled the establishment of virtual tour operators. This does not conform to the definition as expounded Yale (1995). In addition to the presence of virtual tour operators, the increasing use of Central Reservation Systems (CRS) and Global Distribution Systems (GDS) by airlines and hotels has further distorted the original definition of the tour operator. These technologies have enabled customers to access a wide range of products from the principals on terms and conditions similar to those offered by the traditional tour operator.

2. Literature Review

Given the developments in technology and the changes that were occurring in the industry, tour operators had to re-engineer their business models in order to ensure that they remained in business (Karcher, 1996; Kracht, 2009 Potgieter et al.2010).

The internet enabled tourists to accesses various products and services through E-mediaries which operates as virtual tour operators. Further the consumers were also able to accesses different products through the websites of different principals. Finally travel agents could also use the principals' websites to access various products and services. The increase in product distribution competition therefore threatened the central position of the tour operator. Tour operators had to re-engineer their business operations and adopt new business models that incorporated the internet.

The re-engineering of the business entailed, among other things, the creation of horizontal and vertical strategic networks, investing in information communication technologies and creation of virtual platforms using the World Wide Web. The internet became a key component of the tour operators' product distribution channel. Figure 3 below shows the internet based model currently being used by most tour operators.

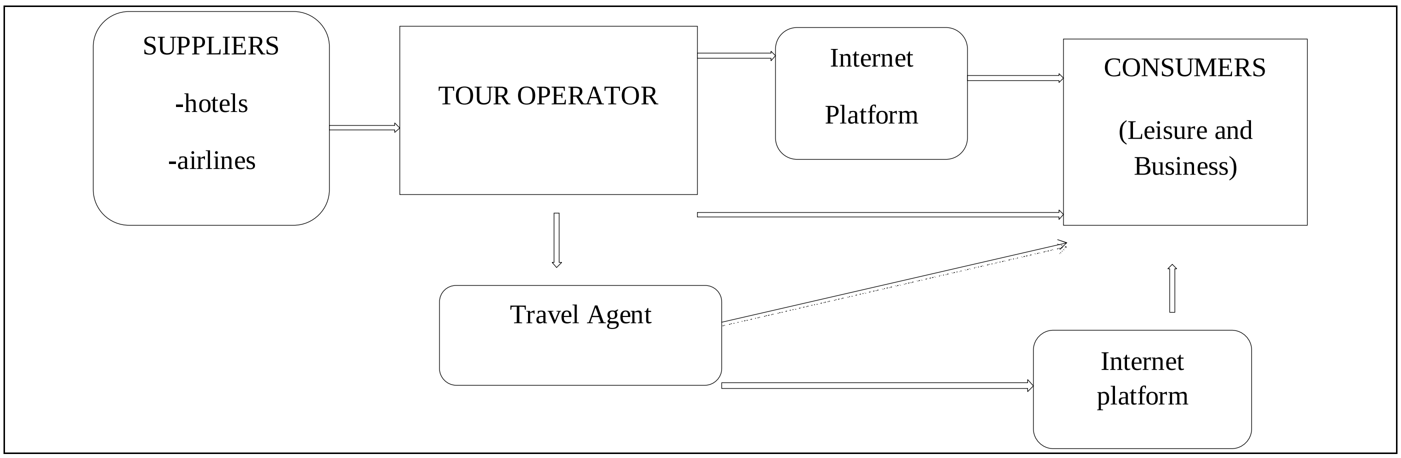

Figure 3: Tour operator internet based model. (Salvado et al; 2012)

The tour operator continues to source products and services from principal suppliers like hotels and airlines and produce package holidays for the market. However instead of relying only on travel agents and their own physical offices for distributing the holiday packages, they have created internet based platforms through which potential customers can purchase their products. The platforms include their own websites which contain a wide range of tour packages and general destination information, their own internet portals that offer all the services that are being provided by e-mediaries and the internet portal of the travel agents who are part of their distribution network.

The new model has helped the established tour operators to compete effectively with newly established e-mediaries. Tour operators have used their trusted brand names to attract customers to their sites. With the dramatic growth of the internet based tour operators and the high bankruptcy rate that has followed this growth (The Economist, 2011) customers have tended to prefer utilizing portals of established and well-known tour operator brands like TUI, Kuoni, and Thomas Cook when purchasing holidays online.

Whilst acknowledging the strategic importance of the internet as a major component in the distribution of their products and services, the global market leaders in tour operations like TUI have retained a strong element of the traditional distribution model. This is in line with Porter's (2001) argument that information communication technologies should only be used as a part of the company's overall business strategy. The tour operators have broadened the types of information technologies which they are now employing in order to continuously enhance their brand image as well as brand visibility. These technologies include among others Facebook, Twitter, YouTube and a multiplicity of other social networks which have increased in popularity with consumers in recent years. The tour operators are investing in search engines and social media technologies to run a variety of promotional activities that are aimed at increasing the volume of clients to their sites.

Globally, the tour operator business has reached a consolidation era whereby the original intermediation model has been buttressed and enhanced by the infusion of a wide range of information communication technologies, (Cavlek, 2013). Some of these technologies, for example You Tube, give the potential customer the ability to sample the product before purchase through virtual tours. The customer is now in a position to have an idea of the type of product or services he or she is going to experience at the holiday destination.

The major tour operators in the developed countries have consolidated their product distribution models most of which are anchored on the original concept of intermediation which is now buttressed by information communication technologies, strong brands and innovation.

2.1. Zimbabwean Tour Operator's Product Distribution System

Tour operators in Zimbabwe operate mainly as ground handlers for clients generated by tour operators in the source markets. They therefore concentrate on the development of tour packages that are sold to tour operators in the source markets. They also focus on ensuring efficient ground handling of clients that would have been sent by source market tour operators. Further they concentrate on managing their relationship with local product suppliers who are a critical component in delivering quality services to the clients they bring into the country.

The majority of tour operators in the country are small and medium sized enterprises. It is therefore difficult for most of them to directly market and promote their holiday packages in the source markets. They do not have the financial and technical ability to compete with the outbound source market tour operators. Their business model is therefore based on a partnership relationship with a range of source market tour operators.

The tour operators in Zimbabwe source products like hotel accommodation and airline tickets from local suppliers in bulk. They undertake research and develop tour itineraries within the country and then put together holiday packages. They endeavour to persuade source market tour operators to include the holiday packages in their own brochures. Once a source market tour operator has agreed to sell the holiday packages, a service and financial agreement is entered into between the tour operators. The source market tour operator will undertake to promote and sell the packages under its brand name.

The Zimbabwean tour operator is responsible for handing all the touring services for the clients during their stay in the country. These include meeting the clients at the airport and transferring them to their respective hotels; taking the clients on guided tours and rendering any advice and additional service that the clients may require.

The Zimbabwean tour operator is also responsible for managing the relationship with the local suppliers. For example, the tour operator ensures that the clients are booked into the appropriate rooms at the hotels where they have been checked into and that all the touring activities provided by third parties are in accordance with the itineraries that were sold by the source market tour operator.

Given the growth of the use of the internet worldwide, it would be expected that tour operators in Zimbabwe would use the technology to market and sell their holiday packages direct to the potential clients in the source markets. This would make their products competitive as commissions to source market tour operators would have been eliminated. However, the tour operators in the country face a number of challenges in selling their products directly to the potential tourists. Firstly, the "digital divide" that is faced by most third world countries, including Zimbabwe, means that tour operators in the country encounter a range of difficulties in trying to adopt information communication technologies in their enterprises. Secondly, the fact that the tourist product is "a purchase unseen" means that potential tourists will only be willing to purchase products on line from tour operators whose brands they are familiar with and are confident of their service delivery (Wiig, 2003). Finally, the ability to understand the product demands of the different customers in the source markets is beyond the capability of the majority of tour operators in Zimbabwe.

The source market tour operator distribution model that is being used by Zimbabwean tour operators is inappropriate for the future sustainability of these enterprises. The World Wide Web has created an environment in which the source market tour operators are able to gather a wide range of information about different destinations and hence can discard the destination tour operator without much negative consequences to their business.

The current model is a high risk one for tour operators in Zimbabwe because there is no guarantee for long term relationship to be established with source market tour operators. The use of the current model helps to explain the high mortality rate that the tour operating enterprises have experienced in the country. For example, companies like United Touring Company, (UTC) Abercrombie and Kent, (A and K) Green Route and Southern African Tourism Services (SATS) which dominated the tourism industry in the 1980s and 1990s have either closed down or are now minor participants in the industry. Source market tour operators moved their business to new partners which they were more comfortable with in terms of service delivery. For example, the establishment of Tourism Service Zimbabwe (TSZ) in 1994, a joint venture company between a major Mauritian tour operator and a Zimbabwean company, resulted in overseas tour operators who were served by the Mauritian company shifting their business from companies like UTC to Tourism Service (TSZ internal reports 1995-1998).

The majority of Zimbabwean tour operators have incorporated information communication technology as part of their business strategy as propounded by Porter (2001). The lack of e-commerce platforms on the websites, however, means that the enterprises are not in a position to reap maximum benefits from their investment. The tour operators therefore need a model that will enable them to effectively leverage information communication technologies to improve their business performance and hence ensure long term sustainability.

3. 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*, (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. In addition to the questionnaire an observation and analysis of the websites of the sample population was undertaken. The main purpose for analysing the websites of the tour operators was to evaluate their usefulness as platforms for product distribution and marketing.

4. Findings

4.1. Demographic Characteristics of the Tour Operators
The ownership characteristics of the tour operators are shown in table1 below.

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

Table 1: Ownership category

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 (Wanjau *et, al*, 2012).
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 4 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.

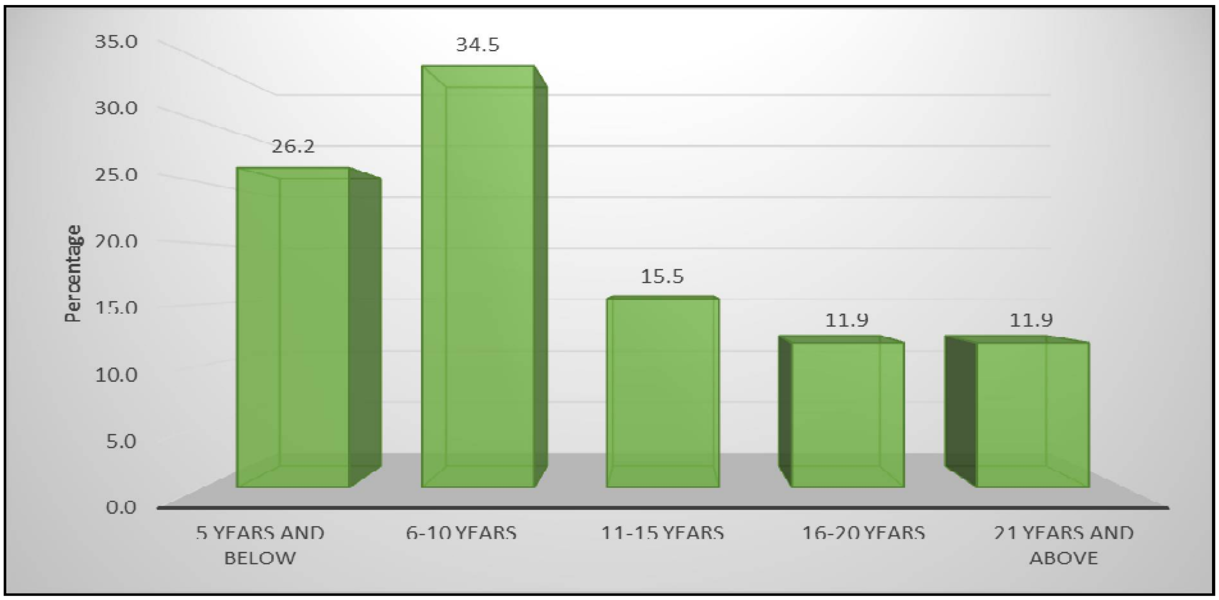

Figure 4: Number of years in operation

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.

4.2. Operational Importance of ICTs
Respondents were asked to rate the importance of information communication technologies in their business operations using two categories: very important and important. The outcomes of the ratings gave an indication of the respondents' perceptions of the role that information communication played in business operations. The results from the frequency analysis are presented in Table 2 below:

ICT operational rating	Frequency (out of 83 valid respondents)	%
Very important	74	89 %
Important	9	11 %
Total	**83**	**100%**

Table 2: Operational importance of ICTs

The majority (89%) of the respondents concurred that the use of ICTs by tour operators was very important, while barely 11% suggested that it was important. In essence, all (100%) of the respondents confirmed the importance of the use of ICTs in their business operations.

4.3. Importance of the Use of ICTs for Business Survival

The respondents were also asked to rate the extent to which they agreed that tour operators must adopt ICTs in order to survive in their business. The respondents were requested to use a 5-point Likert scale with the following categories: strongly agree, agree, neutral, disagree and strongly disagree. The results are presented in Table 3 below:

ICTs business survival rating	**Frequency (out of 83 valid respondents)**	**%**
Strongly agree	64	77%
Agree	14	17%
Neutral	4	5%
Missing	1	1%
Total	**83**	**100%**

Table 3: Importance of the use of ICTs for business survival

Table 3 shows that 77.0% of the respondents strongly agreed that ICTs were important for their survival, 17% agreed that ICTs were important for the survival of their enterprises and only 6 % were neutral on their rating. Overall, 94% (77% -strongly agree+17% -agree) of the respondents agreed that the use of ICTs was essential for the future survival of the businesses.

4.4. Websites Evaluation

The evaluation of the tour operators' websites yielded the results shown in table 4 below.

Variable	**Mean**	**Standard deviation**
Accessibility	8.11	1.793
Functionality	7.51	2.036
Usability	7.51	1.936
Navigability	7.46	2.010
Interactivity	6.16	2.551
Quality of information	7.25	1.967
Online payment capability	1.33	2.645
Design and aesthetic attractiveness	6.96	2.259
Value addition links	5.96	2.909
Translation capabilities	1.50	3.062

Table 5: Website evaluation summary

The results clearly show that whilst the majority of the websites were accessible very few of them were used for online payment and hence this limited the ability of potential clients to pay for the holiday packages they would have booked with the tour operators.

5. Discussion

5.1. The Bimodal Holiday Product Distribution Model

The bimodal product distribution model is anchored on two conceptual frameworks; which are: five strategic business drivers and a bimodal technology driven distribution platform. The model is based on the argument that says that enterprises cannot successfully utilize information communication technologies as the sole pillar for growing their business (Porter 2001). Zimbabwean tour operators need to use information communication technologies as part of their broad business strategy. The model is underpinned by five key strategic drivers which are: product innovation; technology; strategic networks; people and brand development and consistency.

The model enables the tour operators to utilize their knowledge of the country's tourist products and their relationship with local suppliers to develop unique products that will appeal to both the domestic and the international markets. The tour operators' ability to create innovative products utilizing their local knowledge will give them a competitive edge over the product offerings of international tour operators.

The model argues that tour operators need to fully harness the benefits of information communication technologies in their operations. This is essential because the current tourist is constantly linked to the email and social media, is hyper-interactive, has limited attention spurn and is a multichannel user (Starkov and Safer, 2011; Salvado et al 2012). Effective use of technology gives the Zimbabwean tour operators the ability to obtain incremental business as they will be able to sell their holiday packages directly to the source market tourists. Further the use of information communication technologies gives the tour operators the opportunity to improve their products offering as they will be in constant communication with their clients through various internet based platforms.

The model further highlights the need to develop strategic networks at both local and international levels. This is a key success factor for the sustainability of the country's tour operators. The strategic networks lead to the establishment of business partnerships which are essential for the long-term sustainability of the local tour operators.

A major component of the model is staff training. The sustainability of any tourism business including tour operations is depended on good service delivery. Given the fact that today's potential client is extensively travelled and is always looking for value for money the model posts that staff training has to be a core element of the business strategy.

The model further argues that leveraging information communication technologies to interface directly with customers through online platforms will enhance business performance. This can only be realized, however, once the tour operators have established trustworthy brands in the source markets. Tourists are unwilling to purchase holiday packages online from tour operators whose brands they are unfamiliar with because the holiday product is an "unseen purchase". Brand building is therefore another key strategic driver within the framework of the model.

5.2. Pillars of the Holiday Product Distribution Model

Figure5 below shows the proposed bimodal holiday product distribution model for Zimbabwean tour operators.

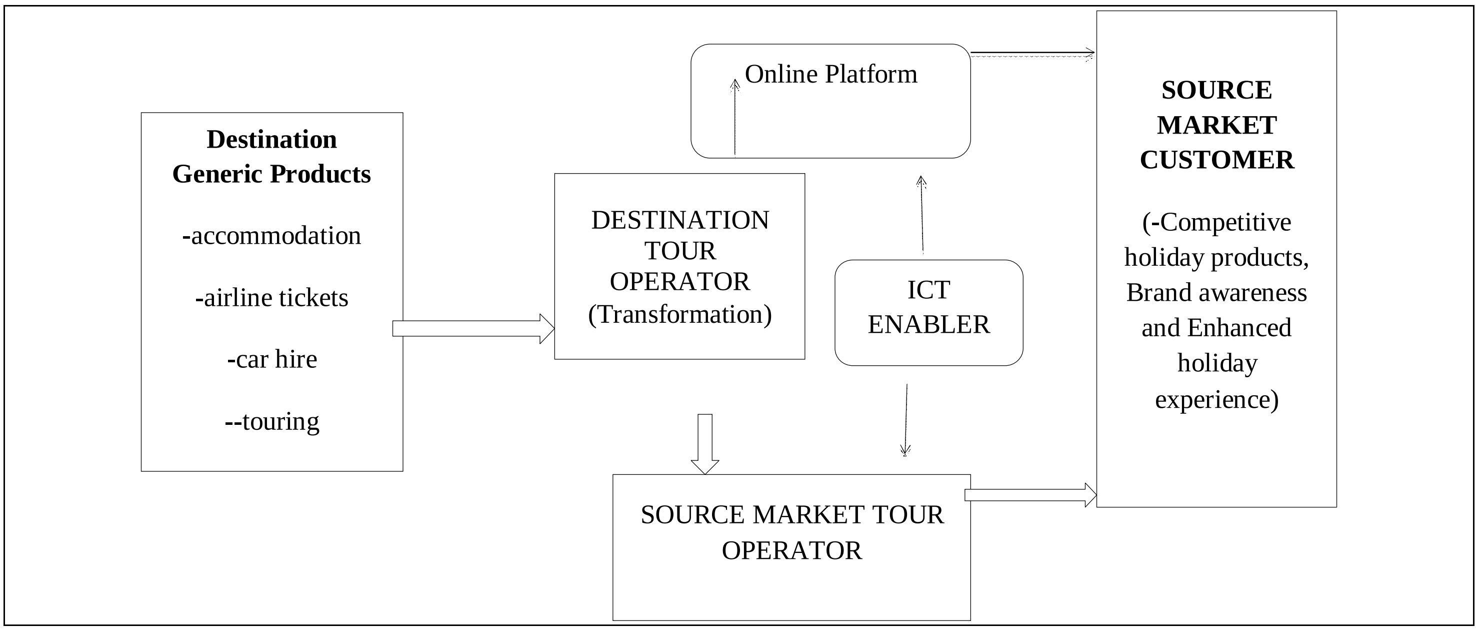

Figure 5: Bimodal holiday product distribution model

The model utilizes two channels for product distribution: the source market tour operator's distribution channels and the destination tour operators' distribution channels. The destination tour operator is the tour operator who is located in the area in which the tourists undertake their holiday activities. In contrast, the source market tour operator is a tour operator who is located in the area where the tourists originate from. The source market customers are all the potential tourists who have the ability to buy holiday packages to different parts of the world. The utilization of the bimodal distribution model is facilitated through the adoption of information communication technologies by the Zimbabwe's tour operators.

The first channel utilizes the traditional distribution platforms. The destination tour operator purchases different generic products (hotel rooms, airline tickets, touring activities etc.) from suppliers in bulk at discounted rates. The different products are then transformed by the tour operator through the creation of inclusive priced holiday packages which the potential tourist can purchase. The holiday packages are finally distributed through the source market tour operator who puts his own mark up on the product before selling them to the potential customers.

The model advocates for the retention of this distribution channel because it gives Zimbabwean tour operators the opportunity to sell their holiday packages through partners that have an in-depth understanding of the customer. These tour operators also have better financial resources to market and promote the holiday packages in the source markets. Further, the source market tour operators have multichannel product distribution platforms which include: a network of travel agencies; call centres; their own retail shops and internet based platforms. The source market tour operator will therefore ensure that the holiday product from the Zimbabwean tour operator is exposed to as large a section of the potential customers as possible.

The second channel for product distribution is through effective utilization of information communication technologies. The destination tour operators use online platforms to distribute their products. The online platform involves the establishment of websites by tour operators. The websites will be linked to the internet and can be accessed by potential customers from different source markets globally. The model allows the Zimbabwe's tour operators to distribute their holiday packages directly to the source market customers through websites and other internet based portals. It entails the Zimbabwean tour operators developing hassle free and attractive e-commerce platforms, on which clients are able to book, confirm and pay for their holidays online without undue delays.

In order to adopt the model in their enterprises the Zimbabwean tour operators will need to invest in ICT equipment because this is a key enabler in the implementation of any internet based product distribution system. The tour operators will further need to train their staff in the use of different information communication technologies applications.

The use of a second distribution channel will enhance the long-term sustainability of the country's tour operator's due to a number of factors. The Zimbabwean tour operators will receive additional business through their online platforms. Further, the model gives the Zimbabwean tour operators the opportunity to create awareness of their own brands within the source markets and hence gradually develop brand trust through referrals from the customers they would have served. This is important for the long-term sustainability of each tour operator because once customers begin to trust the local tour operator brands the enterprises will receive more direct bookings from the customers. The increased direct business flows will help to reduce the Zimbabwean tour operators' long-term dependence on source market tour operators.

The model also gives the Zimbabwean tour operators leverage in negotiating partnership agreements with source market tour operators. This is due to the fact that the source market partners will be aware that the local tour operators are able to source business directly from the markets through their own online platforms. The agreements that they will enter into will therefore be less skewed in favour of source market tour operators as is the current situation. Adoption of the model will enable Zimbabwean tour operator to continually use the source market tour operators' distribution channels to augment their own direct distribution networks.

The model enables the Zimbabwean tour operators to provide customers in the source markets with more competitive holiday packages as they will have cut out the source market tour operator. Finally, the model allows the local tour operators to tap into the well-travelled market segment in the source market that does not need the guidance of the source market tour operators in choosing their holiday destinations. Adequate travel information on Zimbabwean tour operators' websites will assist this market segment to select the type of holiday they require in Zimbabwe. These customers will therefore have the opportunity to enjoy enhanced holiday experiences in the country as they are in a position to specify to the Zimbabwean tour operators the exact type of holiday packages they will be seeking in the country.

6. Conclusion

The study set out to develop a tourist product distribution model for Zimbabwean tour operators. It highlighted the traditional tourist product distribution model and showed how it has been affected by the adoption of the information communication technologies in the tourism industry. It showed how the long-term viability of the Zimbabwean tour operators is depended on the business decisions of the source market tour operators. The proposed bimodal holiday product distribution model is underpinned by two pillars which are the destination tour operator's distribution channels and the source market tour operator's distribution channels. It was finally concluded that the adoption of the bimodal holiday product distribution model by Zimbabwean tour operators will lessen their dependence on source market tour operators and help increase their brand visibility in the source markets.

7. Recommendations

It is recommended that Zimbabwean tour operators include ICTs as part of their business strategy.

It is further recommended that the tour operators adopt the use of the bimodal business model in their operations so as to ensure increased market visibility

It is finally recommended that the tour operators make significant investment in their websites so as to make them a key platform for ecommerce transactions.

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