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The Impact of COVID-19 on the Performance of the Tourism Industry: Reflections on Zimbabwe

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Abstract:

Globally, Tourism is a key sector that contributes significantly to national economies through employment creation, export earnings, and revenue generation. The sector has steadily grown over the last decade in all source markets. In 2019, the sector experienced a downturn in performance following as the sector was heavily affected by the COVID-19 pandemic due to lockdowns and travel restrictions that were imposed by different source markets to contain the spread of the disease. Like any other country, Zimbabwe was heavily affected as it also instituted the same containment strategies as guided by the World Health Organisation (WHO) and the World Tourism Organisation (UNWTO). The objective of the study was to assess the impact of the COVID-19 pandemic on Zimbabwe's Tourism industry. The findings reveal that international tourist arrivals, hotel occupancy, and tourism receipts, inter alia, declined from the onset of the COVID-19 pandemic. Historically, crises have presented a common denominator of diminishing the desire to travel. Policy interventions that can be adopted by the Tourism industry to mitigate and recover during times of crisis include:

- Adopting global guidelines,
- Offering stimulus packages,
- Developing disaster recovery plans,
- Identifying recovery and growth strategies,
- Establishing communication plans, and
- Enforcing effective governance through collaborations

Keywords: COVID-19, tourism, economic performance, growth, recovery, strategies, policy

1. Introduction

Coronaviruses are a large family of viruses that can cause mild to severe upper respiratory tract illnesses (Sheeren, Khan, Kazmi, Bashir, & Siddique, 2020). In December 2019, a severe acute respiratory syndrome coronavirus (SARS-COV 2) was discovered in Wuhan, China. The World Health Organisation (WHO) declared COVID-19 as a global pandemic on March 11, 2020. As of August 2022, WHO reported over 590 million confirmed cases of COVID-19 (coronavirus), including 6.4 million deaths (World Health Organisation, 2022). Following the decision by WHO to declare COVID-19 as a global pandemic, most countries, Zimbabwe included, introduced containment strategies such as lockdowns and travel restrictions to minimise the spread of the disease (Statutory Instrument 72, 2020). Zimbabwe introduced her first 21-day lockdown on March 30, 2020, which included, inter alia, a ban on inter-provincial travel and land boarder closures. All formal and informal businesses were affected, except those offering essential services such as medical services, law enforcement agencies, pharmaceutical businesses, food markets, and the mining industry.

Due to the current pandemic, the Tourism and Hospitality industry has experienced a decline in business activity as most people cannot travel or participate in tourism activities. At the global level, international and domestic travel restrictions have also negatively impacted the performance of tourism industries. While Tourism recorded a 4 percent upturn in global international arrivals from 400 million in 2020 to 415 million in 2021, this performance is still 72 percent less than the pre-pandemic levels (UNWTO, 2021).

The effects of COVID-19 have negatively affected the performance of the Zimbabwean economy, given the importance of Tourism as a key contributor to Gross Domestic Product (GDP), export receipts, and employment creation. The UNWTO (2020), while acknowledging the effects of COVID-19, shared a message of hope, urging travellers and the tourism sector to have the collective responsibility of saving lives through the hash tag, 'stay home and travel tourism.'

The study seeks to highlight the impact of COVID-19 on the performance of the Tourism and Hospitality industry in Zimbabwe and present growth recovery plans for the future.

2. Current COVID-19 Outlook

2.1. Global Tourism Performance

Previously, the Tourism industry has been a global force to reckon buoyed by a growing middle class in developing economies, improved travel and connectivity, and digital technologies, among others. Since 2009, the Tourism sector has experienced a positive growth trajectory of 59 percent until 2019. The year 2012 also marked a new record for international travel as the industry recorded one billion international tourist arrivals (UNWTO, International Tourism hits one Billion PR 12076, 2012). The UNWTO and the global community celebrated this achievement through the campaign; one billion tourists; one billion opportunities. Armed with these positive sentiments, the UNWTO Tourism 2020 Vision projected 1.6 billion international arrivals by 2020. Figure 1 below demonstrates global tourist arrivals from 2009-2021.

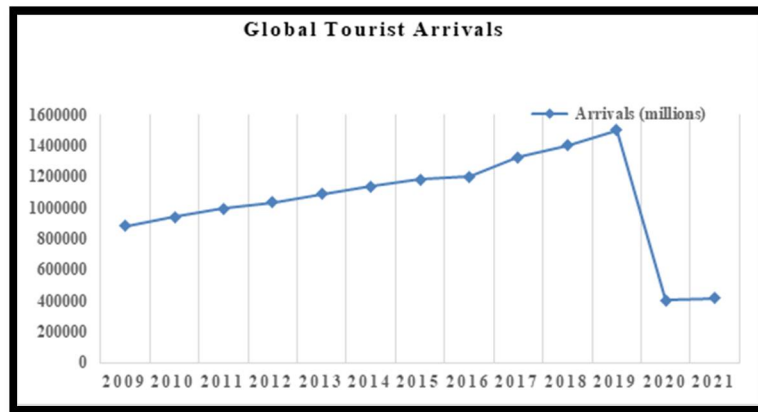


Figure 1: Global Tourist Arrivals
Source: UNWTO

The decade-long positive growth trajectory was halted in 2020, owing to the COVID-19 pandemic. According to the UNWTO, one (1) billion fewer tourists travelled the world compared to the year 2019 due to a fall in travel demand and travel restrictions in most destinations. The collapse in travel demand further resulted in a loss of tourism earnings which amounted to over USD 1.3 trillion, and 120 million direct tourism job losses.

2.2. The Zimbabwean Context

According to Rahman and Shaban, cited in Chirisa et al. (2021), Zimbabwe recorded its first COVID-19 case on March 21, 2020. By mid-April 2020, the country had recorded 14 cases and three COVID-19-associated deaths. The health officials undertook emergency preparedness and response strategies following official reports for suspected cases (Makurumidze, 2020). A cocktail of measures was introduced to contain the spread of the disease on March 30, 2020.

In its African Economic Outlook Report of 2020, the International Monetary Fund (IMF) reported that Zimbabwe's economy contracted by 10 percent on the back of the COVID-19 pandemic. Due to the travel restrictions introduced to curtail the pandemic, Zimbabwe received 639 636 tourist arrivals in 2020 compared to nearly 2.3 million arrivals recorded in 2019 (Zimbabwe Tourism Authority, 2020 Tourism Trends, and Statistics, 2020). A review of the 2020 tourist arrivals indicates that the sector nose-dived 30 years back in terms of performance to the 1991 period. In 2021, arrivals into Zimbabwe further dropped by 40 percent from 639 636 tourist arrivals in 2020 to 380 820 arrivals (Zimbabwe Tourism Authority, 2021 Tourism Trends, and Statistics, 2021). The decline in arrivals was largely driven by the surfacing of the Omicron variant, which resulted in travel restrictions on flights to and from Southern Africa



Figure 2: International Tourist Arrivals
Source: Zimbabwe Tourism Authority

Tourism in Zimbabwe is considered a low-hanging sector alongside other key economic pillars such as Agriculture, Mining, and Manufacturing. Since 2005, the sector has experienced a positive growth trajectory between 6 and 9 percent, succumbing to the global recession in 2008. From 2009, the sector continued with the upward growth trend registering an all-time high of 2 579 974 international tourist arrivals in 2018. According to Nyoni (2021), Zimbabwe's Tourism industry is largely driven by the international market. The onset of the COVID-19 pandemic resulted in the decline of the Tourism business as lockdown measures and travel restrictions affected international arrivals (Ncube, Chikuta, Basera, Baipai, & Mazhande, 2021).

3. Methodology

COVID-19 continues to wreak havoc on world economies as the situation of the pandemic is yet to be contained. The study was conducted in a qualitative approach, and data were collected utilising secondary sources. Data were collected through a detailed review of World Tourism Organisation (UNWTO) reports, Zimbabwe Tourism Authority (ZTA) reports, published academic articles, media reports, and other secondary data sources.

4. Discussion and Findings

This section highlights the findings of this study.

Region	2020	2021	Change
Europe	35 570	68 815	76%
Americas	17 070	20 739	21%
Middle East	21 114	10 004	-53%
Africa	576 819	269 364	-53%
Oceania	4 472	7 266	62%
Asia	12 306	12 634	3%
Total	639 356	350 830	-40%

*Table 1: Tourist Arrivals by Source Markets
Source: Zimbabwe Tourism Authority*

According to the Zimbabwe Tourism Authority (ZTA), the Tourism sector witnessed a negative drop (-40 percent) in tourist arrivals from all source markets for the 2020 to 2021 period. The decline was attributed to a massive drop in tourist arrivals from mainland Africa. Musavengane (2022) asserts that the surfacing of the COVID-19 Omicron variant in South Africa resulted in a ban of flights to and from eleven African countries, Zimbabwe included. The red-list of African countries by the United Kingdom and the European Union (EU) further constrained most African countries whose economies depend on Tourism. Zimbabwe's traditional top ten source markets are:

- The USA,
- The United Kingdom,
- France,
- Germany,
- South Korea,
- Japan,
- Benelux,
- China and
- Italy

The decline in international tourist arrivals thereby informs policymakers to invest more in domestic tourism to counter such shocks.

Region	No. of Hotels	Room Capacity	Occupancy (%)	Clientelle Mix	
				Foreign (%)	Local (%)
Victoria Falls	12	1256	14	22	78
Harare	35	2358	29	7	93
Kariba	11	529	34	6	94
Hwangwe	2	142	16	3	97
Mutare	12	596	34	7	93
Beitbridge	8	264	16	0	100
Masvingo	11	421	25	3	97
Bulawayo	23	1012	39	1	99
Midlands	11	409	32	0	100
Nyanga	7	267	34	3	97
Total	132	7 177	27	6	94

*Table 2: Average Hotel Room Occupancy by Regions 2021
Source: Zimbabwe Tourism Authority*

In terms of average hotel room occupancy, all regions experienced a positive growth, with a national average occupancy of 27 percent. Due to the relaxed travel restrictions in 2021, domestic tourists accounted for 94 percent of average room occupancy in hotel establishments, while foreign tourists accounted for 6 percent of the average room occupancy. Traditionally, domestic tourism customers have always been common in local hotels. The period from November 2021 to January 2022, which is usually one of the peak seasons in Tourism, experienced a downturn in activities due to the COVID-19 Omicron variant, which was reported in South Africa on November 24, 2021, and ultimately affected the rest of Southern African Tourism (Musa, Gyeltshen, Manirambona, & Ayuba, 2022). The rise in occupancies was also propelled by the increase in domestic tourism consumption, largely driven by MICE and business due to the relaxed lockdown conditions in 2021. Most organisations pursued online meetings from 2020 to mid-2021, and the relaxed conditions presented an opportunity for companies to conduct physical and hybrid meetings, thereby increasing domestic tourism. Victoria Falls, as a major tourism destination, attracted only 22 percent of foreign clientele compared to the pre-pandemic period, where it attracted 77 percent of foreign clientele in 2019 (Zimbabwe Tourism Authority, Tourism Trends, and Statistics, 2019:2021). As suggested by Matura (2021), in the absence of international tourism, COVID-19 pandemic presents an opportunity for policymakers to shift their focus from international tourism to domestic tourism promotion.

	Business	Education	Shopping	Visiting Friends	Leisure	Transit	Other
2021	103 511	2 238	1 453	108 341	19 119	144 592	1 566
2020	95 189	5 404	24 184	141 940	83 363	286 934	2 339
Change	+ 9%	- 59%	- 94%	- 24%	- 77%	- 56%	-33%

*Table 3: Tourist Arrivals by Purpose of Visit
Source: Immigration Data*

The results in the table above demonstrate that the purpose of visit to Zimbabwe declined for all categories except Business travellers. Business travel increased from 95 189 in 2020 to 103 511 in 2021, reflecting a 9 percent growth increase. The results are similar to the findings by Research Dive, which projected that Meetings, Incentive Travel, Conference, and Exhibitions (MICE) industry will experience a remarkable growth from 2021-2028, driven by the Meetings sub-segment. Moreover, the uplifting of travel restrictions on travel and social activities to avert the spread of COVID-19 pandemic in Zimbabwe improved the functioning of the MICE industry. The Meet in Zimbabwe campaign, which was launched in 2021, further buttresses the exploits of targeting post-pandemic business travellers. Within the National Development Strategy (NDS 1) and the National Tourism Growth and Recovery Strategy, MICE is one of the key pillars expected to turn around the tourism sector as it moves towards achieving a USD 5 billion tourism economy by 2025 (MECTHI, 2022).

4.1. Tourism Policy Interventions for Recovery

Past crises, such as SARS, Ebola, and COVID-19, all have a common denominator of diminishing travel desires and thereby presenting important lessons for future planning. While most countries reacted and minimised the effects of COVID-19 pandemic on the Tourism industry, it is important to proffer solutions to mitigate future travel disruptions.

4.2. UNWTO Global Guidelines

The UNWTO, as the global tourism agency supporting sustainable tourism development, developed COVID-19 recovery guidelines structured around three main pillars: economic recovery, marketing and promotion, and institutional strengthening and capacity building. The guidelines also inform potential travellers on what to expect regarding travel protocols. Going forward, to restore traveller confidence, Governments must enhance the implementation of guidelines and standards as guided by WHO and other relevant stakeholders. To ensure efficacy, collaborative efforts should centre on regular and strict enforcement of safety guidelines.

4.3. Tourism Stimulus Package

At the national level, Governments should focus on fiscal bailouts to stimulate the Tourism industries. In addition, other macro-prudential measures for the Tourism industry include, inter alia, offering tax relief packages, capacity building for SMEs, and incentives to modernise tourism facilities. Countries should engage multilateral aid agencies to secure lines of credit and official development assistance (ODA) for Tourism projects. UNWTO Member States should set aside a certain percentage of their subscriptions and contributions towards a provident crisis fund.

4.4. Disaster Recovery Plans

To better prepare for future crises, it is important for countries to be proactive rather than reactive through the development of Tourism disaster risk recovery plans and risk management protocols. A crisis communication plan also comes in handy to positively project Tourism industries in times of crisis.

4.5. Recovery and Growth Strategies

Since Tourism is one of the hardest hit sectors, growth and recovery strategies are important policy instruments for destinations. Acknowledging the huge contribution of the Tourism industry, the recovery strategy should aim to outline the resilience of the tourism sector to bounce back from economic instabilities such as pandemics. It should also

outline each stakeholder's key role in accelerating the recovery of the tourism sector. Immediate key Policy interventions for addressing the COVID-19 pandemic include:

- Enhanced domestic Tourism promotion,
- Regional Tourism promotion,
- Destination branding and image transformation,
- Product development and diversification,
- Digital marketing,
- Diaspora Tourism promotion,
- Promotion of MICE,
- Human capital development,
- Tourism safety,
- Health and hygiene protocols

4.6. Governance through Partnerships and Collaborations

When destinations are affected during times of crisis, Government should partner and collaborate with all relevant stakeholders to revive their destinations. Studies have revealed that the subject of governance is a critical destination recovery tool (Penny Wan, Li, Lao, & Dioko, 2022). As Tourism is a highly dependent sector, networks and partnerships are essential to enhance the resilience of destinations during times of crisis.

5. Conclusion

Even though COVID-19 brought the Tourism sector to its knees, it presented an opportunity for policymakers to introspect on pre-pandemic tourism development strategies. While international tourism is lucrative for all destinations, it promotes domestic tourism. Reactive and solution-based strategies are also key instruments in times policy implementation during times of crisis.

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