

Inventory and Analysis of Community Based Tourism in Zambia



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Every effort was made to provide an accurate and comprehensive inventory and analysis. This may have been compromised, however, by time and resource constraints and any errors that appear are those of the Consultant.

Finally, it is important to note that the contents of this report reflect the opinions of the Consultant and the various stakeholders interviewed during the study, and do not necessarily reflect the opinions of the PROFIT programme and USAID.

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Acronyms

ADMADE	Administrative Design for Game Management Areas
AP	African Parks Conservation
AWF	African Wildlife Foundation
BRE	Barotse Royal Establishment
CBNRM	Community Based Natural Resources Management
CBO	Community Based Organisation
CBT	Community Based Tourism
CCC	Chiawa Community Campsite
CHICODA	Chiawa Community Development Association
CLUSA	Cooperative League of the United States of America
CLZ	Conservation Lower Zambezi
CMCC	Choma Museum and Crafts Centre Trust Ltd.
COMACO	Community Markets for Conservation and Rural Livelihoods
CONASA	Community Natural Resources Management and Sustainable Agriculture
CRB	Community Resource Board
CRT	Centre for Responsible Tourism (UK)
CSR	Corporate Social Responsibility
DANIDA	Danish International Development Agency
DOT	Department of Tourism
DCA	Department of Civil Aviation
DSI	Development Services and Initiatives
ECZ	Environmental Council of Zambia
EU	European Union
GDP	Gross Domestic Product
GEF	Global Environment Facility
GMA	Game Management Area
GRZ	Government of Republic of Zambia
IDE	International Development Enterprises
IIED	International Institute for Environment and Development
IUCN	International Union for the Conservation of Nature
JICA	Japan International Cooperation Agency
KANTIPO	Kafue Anti-Poaching Company
KAVIKA	Kabwata Visual Arts and Crafts Association
KNP	Kafue National Park
KTL	Kasanka Trust Ltd.
KVTP	Kawaza Village Tourism Project
LPNP	Liuwa Plain National Park
LNP	Lochinvar National Park
LSA	Luangwa Safari Association
LTA	Livingstone Tourism Association
LZNP	Lower Zambezi National Park
MATEP	Market Access, Trade and Enabling Policies Project
MCA	Mwanachingwala Conservation Area Ltd.
MDT	Mukuni Development Trust
MFNP	Ministry of Finance and National Planning
MNP	Mosi-oa-Tunya National Park
MS	Danish Association for International Cooperation
MTENR	Ministry of Tourism, Environment and Natural Resources
NACOBTA	Namibian Community Tourism Association
NGO	Non Governmental Organisation
NHCC	National Heritage Conservation Commission

NLCP	North Luangwa Conservation Project
NLNP	North Luangwa National Park
NMB	National Museums Board
NORAD	Norwegian Agency for Development
NPWS	National Parks and Wildlife Service
NRCF	Natural Resources Consultative Forum
NTDP	Namibia Tourism Development Programme (EU)
NTP	Nakapalayo Tourism Project
ODI	Overseas Development Institute (UK)
OEF	Oxford Economic Forecasting (UK)
PCV	Peace Corps Volunteer
PPT	Pro-Poor Tourism
PROFIT	Production, Finance and Technology Programme
PRSP	Poverty Reduction Strategy Paper
RETOSA	Regional Tourism Organisation for Southern Africa
RPS	Robin Pope Safaris
RTDO	Regional Tourism Development Officers
SEED	Support to Economic Expansion and Diversification (World Bank)
SEKA	Sensitisation and Education through Kunda Arts
SI	Sun International
SLCS	South Luangwa Conservation Society
SLNP	South Luangwa National Park
SNV	Netherlands Development Organisation
SRT	Save the Rhino Trust
SWOT	Strengths, Weaknesses, Opportunities and Threats
TCA	Tourism Concession Agreement
TCZ	Tourism Council of Zambia
TDCF	Tourism Development Credit Facility
TBNRM	Trans Boundary Natural Resource Management
UCOTA	Uganda Community Tourism Association
UNDP	United Nations Development Programme
USAID	United States Agency for International Development
VAG	Village Action Group
VVF	Village Visit Fund
WCS	Wildlife Conservation Society (USA)
WECZ	Wildlife and Environmental Conservation Society (Zambia)
WLNP	West Lunga National Park
WLT	West Lunga Trust
WTO	World Tourism Organisation
WTP	Willingness to Pay (tourist)
WTTC	World Travel and Tourism Council
WWF	World-Wide Fund for Nature
ZAWA	Zambia Wildlife Authority
ZMK	Zambian Kwacha
ZNTB	Zambia National Tourism Board

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Executive Summary

Community based tourism (CBT) can be defined as tourism which is owned and/or managed by communities and generates wider community benefit. CBT is in its infancy in Zambia but it is growing with tourism in general. There has been more CBT product development than stakeholders are aware of as there is no formal or informal CBT network and a lack of information dissemination, coordination and planning. In total, 25 CBT initiatives were identified: 23 operating and 2 defunct enterprises. Several more CBT ideas and planned projects were identified.

Most CBT is centred on mainstream tourist centres such as Livingstone and the Luangwa valley. However, the number of bed-nights and income captured by CBT remains extremely small, as does its marketing profile.

Tourism is a complex industry with many linkages to other economic sectors such as crafts, transport and agriculture. There are a wide range of roles in which communities can participate in the industry and increase benefits to the poor from tourism. The focus and scale of interventions to involve the poor in tourism can vary enormously but there are several critical factors that can constrain or facilitate progress.

A few CBT projects have already failed and many will struggle to ever be profitable resulting in disappointed expectations and disillusioned communities. The main reason for this is that much CBT in Zambia has been donor-driven not market-led. Many projects have had multiple and sometimes conflicting objectives, for example, they are defined as commercially grounded but are burdened with environmental and social objectives and unworkable economic structures.

CBT projects have also collapsed or performed poorly as little or no market research on product development was undertaken with the private sector. Furthermore, if CBT products are not well linked to the mainstream tourism industry their profile will remain very low as marketing is a major challenge for poor rural entrepreneurs.

CBT has also been limited by low development levels as communities lack capital, capacity and skills, infrastructure and strong institutions. Tourism is not an ideal entry-level business for rural communities with little previous experience. It is demanding, can take years to be successful and as in other most other industries even entrepreneurs with considerable experience can fail to start-up and make a profit.

Several donor initiatives have given inappropriate and unattainable roles to communities in tourism such as lodge management, rather than focus on low capital business start-up (e.g. basic campsite or village tour), joint venture with a tourism investor or support role in tourism (e.g. supplying food products) that could be more successful i.e. generate a secondary income.

There has been little, if any, networking between agencies implementing CBT in Zambia and local lessons are not being learnt. Moreover, there is a wealth of regional experience on how to (or not) involve communities in tourism from east and southern Africa and guidelines of good practice that can be drawn on.

CBT has undoubtedly been most successful when it has been private sector driven, grounded in market opportunity and developed with an understanding of the highly competitive and sensitive nature of the broader tourism industry. Several commercial tourism operators 'champion' highly successful CBT enterprises and provide technical advice and marketing support.

Many more companies are keen to involve local villages as they estimate a high proportion of their clients (on average 44%) are interested in community and cultural activities. These positive examples

and potential are generally not appreciated due to poor communication between the industry, government and NGOs.

It is also not widely acknowledged that CBT is only likely to be successful as an add-on product to mainstream commercial tourism as Zambia is an expensive destination and few tourists are likely to travel to the country (with the exception of Livingstone) for low/middle range products which is predominantly the CBT market.

There are various further challenges to developing commercially grounded CBT in Zambia. These include a lack of information on potential markets, product quality and promotion, a lack of enabling frameworks, cultural constraints and local governance, and development in marginal tourism areas.

There is insufficient information on the volumes and movements of different market segments such as international fly-in, self-drive, backpackers, overland trucks, expatriate residents and business visitors to plan add-on CBT product development.

The tight schedules of most tourists and the lack of local high quality products and services constrain commercial operators from marketing community and cultural activities. Problems such as litter, uninviting or aggressive behaviour of residents, and poor infrastructure can make villages unattractive to tourists.

A key question for stakeholders in CBT in Zambia is what is it marketing? Is the product unique, presentable and what value does it add to the national tourism product? Is it marketing 'responsible tourism', 'ecotourism', conservation and/or development projects, authentic or westernised cultures, poverty or private enterprise?

Another emerging constraint is that most CBT enterprises are illegal, not licensed and no minimum standards are enforced. Potential threats to tourist safety are particularly acute in GMAs due to wildlife. Potential dangers have been exacerbated due to poor land-use planning in 2 locations as CBT camps for photographic clientele have been built in prime hunting areas.

Commercial operators are required by government and international agencies to only do business (particularly when direct payments are involved) with legal entities. This presents a dilemma as most CBT enterprises are not legal or licensed. Moreover, the weak legal status of CBT could prevent companies and communities entering into mutually beneficial partnerships and cause undue interference by local elites.

Internal community disputes (e.g. jealousy) and the importance attached to traditional leaders have led to several situations that have undermined CBT enterprises, even threatening or forcing closure. In addition, the payment of tributes and a perceived and real lack of transparency in communities, could in the longer term threaten a niche promotional image of CBT in Zambia as 'responsible tourism'. The market (tourists and potential investors) will ultimately be deterred if tangible wider community benefits from CBT are not realised.

The Government has had minimal influence on CBT. ZNTB markets very few CBT products and has not addressed creating an enabling framework to legalise the enterprises. DOT is focused on CBT product development but does not consider CBT as enterprise. ZAWA provides ad hoc advisory and communications support to CBT enterprises in GMAs. DOT and ZNTB are keen to launch a country-wide sensitisation of communities on how to benefit more from tourism. The Government needs to have a more consistent understanding of tourism as a private sector activity in which it plays a critical facilitation role to create an enabling policy and legal environment.

CBT can work in Zambia but expectations of what, where and how it can deliver must be realistic. Projects produce (at best) modest cash benefits and these are often captured by a relatively small

proportion of the community (usually the elite). It is extremely difficult to develop CBT in marginal tourism areas, especially where there are no commercial tourism operators to provide the market. For example, if there was more infrastructure and promotion of cultural festivals, waterfalls and heritage sites, it is doubtful that this would result in commercially viable businesses as these are low volume special interest niche market tourism attractions.

CBT is currently 'in vogue' in Zambia and it is only one means to an end. By virtue of its narrow definition and many constraints, it is likely to remain a marginal component of the tourism industry. There is no blueprint but there are broader perspectives and a wider range of actions are needed to increase benefits to the poor from tourism in developing destinations such as Zambia. These go well beyond simply promoting community tourism – although work at the grassroots level to develop enterprises and local capacity is one key component.

Pro-Poor Tourism (PPT) is defined as tourism that results in increased net benefits for poor people. PPT is not a specific product or niche sector but an approach to tourism development and management. It enhances the linkages between tourism businesses and poor people; so that tourism's contribution to poverty reduction is increased and poor people are able to participate more effectively in product development.

Links with many different types of 'the poor' need to be considered: staff, neighbouring communities, land-holders, producers of food, fuel and other suppliers, operators of micro tourism businesses, craft-makers, other users of tourism infrastructure (roads) and resources (water) etc. There are many types of PPT strategies, ranging from increasing local employment to building mechanisms for consultation. Any type of company can be involved in pro-poor tourism - a small lodge, an urban hotel, a tour operator, an infrastructure developer. The critical factor is not the type of company or the type of tourism, but that an increase in the net benefits that go to poor people can be demonstrated.

The PPT partnership (www.propoortourism.org.uk) focuses on documenting international experiences and promoting local procurement, products and partnerships. PPT pilot projects have promoted strategies that tourism companies can use to increase the local development impact of their business in eastern and southern Africa. The focus has been on linkages that involve local people or enterprises *and* make business sense to the company. All stakeholders in Zambia should look beyond CBT and explore how PPT strategies can increase net benefits to the poor from tourism.

1. Introduction

1.1 Tourism and Communities

The Government of Zambia (GRZ) sees tourism as a sector that offers economic diversification beyond agriculture and mining. Historically tourism in Zambia has focused on the Victoria Falls and wildlife. Marketing of cultural heritage and community attractions has been very limited. Tourism is growing and can contribute to poverty reduction. Most community involvement in tourism has been passive, in the form of revenue sharing rather than entrepreneurial activity.

Community participation in tourism can be viewed from a private sector development perspective. Community Based Tourism (CBT) can create entrepreneurial opportunities for the poor and act as a catalyst for rural development. CBT in Zambia is in its infancy but growing, and there are a few established enterprises such as village walks, campsites, traditional style chalets, homestead stays, entertainment and curio markets. Mainstream commercial operators are increasingly seeing cultural and community products as highly marketable and complementary add-ons to their existing attractions.

1.2 PROFIT and Purpose of Work

One of the aims of the USAID private sector development programme, Production, Finance and Technology (PROFIT), is to conduct an initial assessment of the tourism industry particularly as it relates to rural/poor communities, with a view to identifying the need for and scope of possible interventions aimed at upgrading the industry, based on a strategy of differentiation. Differentiation can be defined by the mix of tourist products available, the quality of the assets, the effective management of the assets, and the overall quality of service delivery to tourists.

PROFIT will work closely with its sister project - Market Access, Trade and Enabling Policies Project (MATEP) - that will take the lead in marketing and fostering new investment. The focus of PROFIT's interest in tourism would be on targeting high potential models for integrating poor communities into the tourism industry on a commercial basis, broadening and deepening the benefits from tourism activities accruing to these communities, and replicating appropriate models. PROFIT will also assess the potential for promoting industry supporting roles that may be more appropriate and beneficial to communities as opposed to direct involvement in the tourist industry. For example, it may make more sense for a farming community to produce high value fresh organic vegetables for professionally run accommodation than managing a campsite.

To achieve these objectives PROFIT required an industry analysis focusing on existing and potential CBT activities as there was no inventory or adequate understanding of the full range of activities currently taking place in Zambia. While there is some understanding of the type and location of most of the tourist assets available, there is limited knowledge about the extent to which local communities are benefiting, the constraints on increasing their contribution and benefits, the commercial sustainability of the programmes currently operating, and potential opportunities based on expanding and replicating already proven models.

1.3 Scope of Work

The tasks undertaken for the baseline study were:

- Desk review of different local and regional tourism industry assessments
- Compilation of a country-wide inventory of CBT activities
- Identification of high potential models based on commercial viability, consistency of approach compared to the market segment, tourist assets, and local community resources/skills.

The specific focus of the inventory was on services owned and managed by communities and provided *directly* to tourists. Limited consideration was given to supporting roles such as crafts and food production. Additional aspects such as the tourism industry's support to local community development projects were included for contextual and comparative purposes.

2. Methodology

2.1 Study Preparation and Staff Participation

Preparatory meetings were held between the consultant, PROFIT and MATEP to agree and formalise the Scope of Work. Further discussions facilitated and finalised stakeholder interviews, the field work schedule, survey methodology and reporting. Where possible, PROFIT and its consortium partners participated in the fieldwork to improve their understanding of CBT. In Livingstone, IDE aided fieldwork and PROFIT Choma Office staffs joined an interview and were briefed on the study. The PROFIT Programme Director and Private Sector Development Advisor joined the field visit to assess CBT in Liuwa Plains

2.2 Documentation Review

Key recent documents providing data and analysis on the tourism sector were reviewed:

- Tourism Policy (1997)
- Draft Tourism and Hospitality Act
- DSI Financial and Economic Analysis of Managing Protected Areas (2004)
- WTO CBT Mission to Zambia Report (2004)
- WTTC/OEF Zambian Travel and Tourism Study (2005)
- JICA Tourism Sector Analysis Reports (2005)
- LSA Tourism Study (2005)
- NRCF/UNDP/GEF/World Bank Tourism Study Document (2005)
- Various Pro-Poor Tourism (PPT) publications on east and southern Africa

2.3 Inventory Development

CBT enterprises were identified through consultations with government, donor agencies, NGOs, the private sector, community tourism initiatives and tourist guidebooks. A total of 25 were identified. No functioning CBT initiatives were identified in Luapula, Copperbelt and North Western Provinces. Proposed and potential CBT initiatives were also identified where possible.

2.4 Questionnaire Surveys

Three different questionnaire survey forms were developed to standardise and maximise data collection.

1) A survey for NGOs and donor agencies (Annex 1) addressed the following:

- Awareness and identification of CBT operators
- Awareness and identification of communities involved in tourism support roles (e.g. crafts)
- Organisational programme area(s) that cover CBT
- Geographical areas of organisational activities that include CBT
- Past and present technical and/or financial assistance to CBT
- Monitoring and evaluation of CBT project impacts
- CBT job and wealth creation
- Constraints to CBT development
- Future work programmes in CBT and development partners

This questionnaire was emailed to stakeholders but as the response rate was poor interviews were also held. In total, 25 NGOs and donor agencies completed the survey and/or were interviewed.

2) A survey for tourism companies (Annex 2) addressed the following:

- Natural and cultural assets on which their product is based
- Products and services
- Customer base by market segment
- Customer interest in community and cultural activities
- Promotion and type of local community and cultural activities
- Assistance to community tourism activities
- Community support roles in supplying other goods and services
- Opportunities for communities to benefit more from tourism
- Constraints to CBT development
- CBT external support requirements
- CBT licensing requirements
- Employment of local community
- Support to local community development projects
- Negative economic and socio-cultural impacts of tourism

This questionnaire was emailed to 73 commercial companies including tour operators, lodges, travel agents and hunting safari outfitters country-wide. This was followed up by 25 interviews in the field. Overall, the survey response rate (29) was remarkably high (40 %) considering how busy tourism companies are between September and November. This was attributed to good personal relationships with operators, general goodwill and appreciation of the consultation effort, and a desire to articulate their support to local communities.

3) A survey for CBT operators (Annex 3) addressed the following:

- How the business started
- Proximity to tourism assets and routes
- Products and services provided, facilities and prices
- Booking mechanisms
- Marketing and linkages to commercial companies
- Competition
- Seasonality
- Visitor numbers
- Customer type (market segments)
- Land ownership and land user rights
- Organisational/ group set-up and membership
- Employment
- Training and technical advice received
- Grants, loans and donations received
- Gross revenue and net profit
- Licensing and permits
- Recipient local community development projects
- Negative economic and socio-cultural impacts of tourism
- Constraints to increasing business and benefits
- Future tourism development
- Knowledge of other CBT efforts locally and country-wide

Out of 25 identified CBT initiatives, 22 were visited and questionnaires completed in the field with the help of the consultant. A translator was not required. The process of completing the questionnaire was instructive to many community members as it made them see their CBT initiative more critically as a business and the exercise raised their awareness and knowledge of the tourism market and CBT efforts in other parts of Zambia. It was made clear to interviewed community members, however, that

the research may not lead to any form of assistance in the future to limit expectations being raised. When practical, the Consultant undertook the CBT activity, for example staying overnight at Chiawa campsite and Kawaza village and participating in the Mukuni Village tour.

2.5 Field Visits and Stakeholder Interviews

The work programme was undertaken between mid-September to late November 2005. It encompassed desk research and meetings in Lusaka; visits to CBT enterprises combined with interviews with commercial companies, NGOs, funding agencies and government representatives in the field (Annex 4). Field trips were made to all 6 out of 9 Provinces where CBT enterprises were identified:

- Lusaka Province (Lower Zambezi)
- Central Province (Kasanka, Mumbwa)
- Northern Province (Bangweulu, North Luangwa)
- Eastern Province (South Luangwa)
- Southern Province (Upper Zambezi, Livingstone, Choma, Lochinvar)
- Western Province (Liuwa Plains)

Due to good organisation, serious country-wide fuel shortages did not compromise the field work which was completed before the onset of the rains. Various means of transport were used including light aircraft, 4x4 vehicles, motorbike, bicycle and dugout canoe (*makoro*).

2.6 Research Limitations

The Consultant's association with a major donor agency may have affected perceived neutrality and respondents input. Furthermore, as an outsider to the communities, the Consultant may not always have received honest responses. In several instances, for example in Chiawa and Mukuni, 'gatekeepers' controlled the consultant's access to community members and information which may have influenced the assessment. Due to time constraints it was not possible to hold meetings with the wider community to assess views and benefits.

Three (out of 25) identified CBT sites were not visited due to time and resource constraints. These were Tikondane Community Centre (Katete), Dudumwenzwe campsite (southern Kafue) and Chikwa Bushcamp (North Luangwa). Tikondane is borderline CBT as it is an Australian church development project; the Centre completed the questionnaire by email. Dudumwenzwe is not operational and information on this site was obtained through a detailed interview held with CARE in Livingstone. Mwanya and Chifunda Bushcamps provided information on Chikwa which is an identical camp.

Due to the timing of the research, it was not possible to visit any of the five main traditional festivals. The potential of festivals was assessed through interviews with tourism companies.

Not all commercial tourism operators completed the questionnaire survey despite follow-up. The response rate, however, was very good at 41%. The sample may reflect companies with more interest in CBT and community development although the propensity to respond was more likely attributable to personal contacts and good relationships.

Information from NGOs and donor agencies was mostly obtained through interviews. Unfortunately it was not possible in some instances to gain data on the funds invested into CBT projects and thereby assess CBT hidden subsidies and commercial viability. Furthermore, MTENR did not avail information regarding loan repayments rates to the Tourism Development Credit Facility (TDCF).

The documentation review was limited as significant information gaps currently exist on the tourism sector in Zambia. The only CBT industry assessment previously undertaken was conducted by the WTO in 2004 but its utility is very limited as the consultant visited just 2 CBT enterprises and did not consult the private sector.

3. Overview of Tourism in Zambia

3.1 Asset Base

Zambia is fortunate to have some highly desirable natural tourism attractions based on wildlife, waterfalls, scenery, and wilderness experiences. Other assets of existing or potential appeal are cultural traditions, historical heritage and recreational water bodies.

From this base a tourism industry has grown up primarily exploiting wildlife (consumptive and non-consumptive) and the draw of Victoria Falls. On the back of these, other natural and man-made attractions have been developed. These include adventure activities (white-water rafting, scenic flights), historical sites (cave paintings, David Livingstone sites, Shiwa N'gandu house), cultural tourism (museums, traditional ceremonies, dances, village tours and stays), scenic enjoyment (waterfalls, Mutinondo wilderness, Batoka Gorges) and entertainment (casinos, bars, restaurants, night clubs).

Zambia would still appear to have a wealth of under developed or un-exploited tourism attractions including Lake Kariba, Lake Tanganyika, waterfalls in Northern and Luapula Provinces, Kafue National Park, the West Lunga and Mweru Wantipa/Nsumbu protected area systems, Nyika National Park and the Bangweulu basin. Common constraints for the better utilisation of these attractions are remote location, depletion of wildlife and comparative disadvantages to regional competition. If tourism volumes continue to increase as predicted, however, more of these areas may become viable and be further developed for tourism.

The future expansion of tourism outward from the existing centres would be highly desirable for the following reasons:

- Relief of congestion in existing centres
- Wider distribution of economic benefits of tourism
- Conservation incentives for more protected areas
- Widespread catalytic development opportunities from tourism activity
- Increased tourism capacity without loss of wilderness quality

3.2 Industry Assessment

With the exception of a few larger hotels mainly in Livingstone and Lusaka, the Zambian international tourism industry is characterised by a small and undercapitalised private sector driven by expatriate residents or non-indigenous nationals with small investment and low (if any) net financial return.

Due to the paucity of statistical information available on tourism in Zambia, it is hard to quantify market segmentation. Little can be drawn from the statistics available for tourism income and visitor numbers except overall averages. However, there is a broad range of holiday tourist types in Zambia including:

- 1) International holiday tourists flying internally between Livingstone and various National Parks and other historic and wildlife attractions. These are upmarket tourists maybe spending around \$500 a night in country.
- 2) Safari hunting clients. These clients usually travel by internal charter flights, visit typically 1-3 hunting areas. Their total numbers are low but they are very high spend tourists, spending maybe \$2,000 per day in country.
- 3) Self-Drive international clients. These are either regional visitors in their own vehicles or fly-drive visitors from further a field. Probably less economically significant than category 1, but fairly numerous and medium spend of maybe \$100 a night.

- 4) Organised and led mobile safaris in cars, minibuses and overland trucks. A small but growing sector with a variety of spending levels from maybe \$20 a day to \$200 a day in country.
- 5) Non-indigenous residents. May fly using internal schedule or charter flight, self drive or use public transport. Typically more adventurous travellers visiting major destinations as well as smaller and more remote ones. Daily spend maybe from \$20 to \$200.
- 6) Independent backpackers. Using mostly local transport and occasionally flights. Concentrated on Livingstone but sometimes visiting national parks, other attractions, Lusaka and transiting through Zambia. Daily spend maybe \$30.
- 7) Zambian nationals. Relatively low propensity to holiday tourism due to financial constraints and cultural reasons. Spend levels from \$10 to \$200 per day.
- 8) Educational and research groups. Few from outside the country, but steadily growing number especially from private institutions within. Strong local demand to avoid long travel distances. Spend levels from \$5 to \$75.

Due to the relative difficulty and high cost of travelling to Zambia from overseas and the large distances between attractions, Zambia tends to be visited by tourists with a specific agenda of seeing (or hunting) its wildlife highlights and visiting the Victoria Falls. With the exception of Livingstone which has fairly good international travel connections and high geographic density of tourism attractions, lower value activities such as walking, cycling, cultural or historical sites are unlikely to attract the large volumes which they require to be commercially successful. Zambia is seriously disadvantaged in competing for lower cost tourism by its sheer size, distance from major markets, high cost of inputs, and under-developed transport and communication networks.

This constraint is particularly important to consider in relation to the development of successful CBT enterprise which tends to be low to middle end tourism, because few potential customers are likely to travel to Zambia (with the possible exception of Livingstone) for low/middle range products. Hence CBT is only likely to be successful as an add-on product to mainstream medium to high end commercial tourism.

Development of the tourism industry is led mostly by entrepreneurial individuals or partnerships, although the input of government agencies is often critical to tourism enterprise. Examples are the provision and maintenance of road and communication networks, and the management of wildlife resources (ZAWA). Although there are examples of government initiative leading the way for tourism development such as the construction of an airport, road and bridge in Mfuwe, and the current uplifted protection and development of Kafue National Park supported by the World Bank SEED Project, there are other cases where government provides almost no support with operators maintaining their own roads and airstrips, providing wildlife protection and using independent satellite communications. As in all sectors of the economy, inescapable dependence on government monopolies such as the supply of fuels has been a source of much concern to companies when it breaks down. Whilst the government has maintained the ZNTB to market Zambia as a destination, survey responses show that operators find they have no influence over its operation, that it is poor value for money (licence fees) and prefer to rely on their own efforts.

The industry has a poor record of cohesion and joint marketing. In recent years the Tourism Council of Zambia (TCZ) has been struggling to fulfil its mandate of representing the entire industry to government. Some geographical areas and industry sectors have effective associations, notably the Luangwa Safari Association (LSA), whilst other areas and sectors have weak or non-existent cohesion or representation. For example, the Livingstone Tourism Association (LTA) was initially effective and secured visa waivers but currently lodges complain that the membership has become too diluted to be effective and is not worth the US\$100 membership fee (Lodges Pers. Comm.). There is no network either formal or informal for CBT in Zambia.

3.3 Economic Impact

Tourism is a small but steadily growing economic sector in Zambia and the value of the sector and its economic multiplier effects is a matter of debate. Information on the economics and finances of tourism and protected areas in Zambia is currently extremely limited.

A recent study based on the WTO Tourism Satellite Accounting (TSA) method prepared by Oxford Economic Forecasting (OEF) for the World Tourism and Travel Council (WTTC) shows that tourism contributes around 1.9% (directly) or 4.5% (directly and indirectly) to Gross Domestic Product (GDP), 3.7% of total employment, 10% of direct exports and is forecast to grow at 4.5% per annum over the next 10 years (WTTC, OEF 2005).

A study prepared by Development Services and Initiatives (DSI) for the United Nations Development Programme (UNDP) and the Global Environmental Facility (GEF) estimated the economic impact of national parks in Zambia as 2.5% of GDP (DSI 2004). The study used a different model of economic impact analysis and incorporated outdated tourism multipliers from Kenya so the methodology and results may not be accurate (DSI 2004).

The only available in-depth economic research on a destination within Zambia is the recent tourism study commissioned by the Luangwa Safari Association (LSA). The study factors in the same multiplier effect as DSI and indicates that tourism in the Luangwa valley is worth US\$6 million annually (Pope 2005).

A new survey of international tourists to build on the DSI findings is underway. It is assessing nature-based tourism demand, economic impacts using newly calculated multiplier effects and tourists willingness to pay (WTP) (NRCF/UNDP/GEF/World Bank 2005).

The Government set a challenging growth target for tourism in the Poverty Reduction Strategy Paper (PRSP) of reaching 10% of GDP within 10 years. Given the annual GDP growth rate of Zambia (5% in 2004), however, and that the sector currently only represents 4.5% of GDP and is growing at 4.5% per annum, this target will be unattainable without a substantial boost to the sector (NRCF/UNDP/GEF/World Bank 2005).

The Government's vision may currently be unattainable but should be viewed in the context of Zambia's undeveloped tourism assets and the regional picture. Tourism accounted for 8.8% of GDP across sub-Saharan Africa (WTTC, OEF 2005) and the World Tourism Organisation (WTO) estimated that in 1998 Zambia captured no more than 0.76% of tourism income to the Southern African region.

Furthermore, the growth target is particularly difficult to achieve with reference only to the holiday industry as only around 30-40% of international tourists as classified by MTENR are on holiday. No more than 35% of tourism income would appear to be from holidays, as in 2003 the dominant holiday destinations of Livingstone, Lower Zambezi and South Luangwa earned approximately US\$34,000,000 (Pope 2005, DSI 2004), against a total national tourism income of US\$148,841,075 (MTENR data).

The relatively labour intensive nature of the tourism industry and the high proportion of tourism facilities in rural areas, means that the industry is a particularly important positive economic force. Tourism businesses contribute significantly to:

- Employment in areas of high un-employment
- Local development through direct financial and technical support
- Government revenue through taxes and fees
- Conservation through physical presence, active management support, and by placing value on natural resources.

These important factors increase the relevance of tourism well above its direct contribution to GDP.

The most reliable data available indicates that there were 577,526 recorded international tourist arrivals in 2003 broken down into:

- 30% Holiday (172,967)
- 16% Visiting Friends and Relatives (90,010)
- 41% Business visitors (236,326)
- 14% Other (78,223)

Table 1 Business and Tourist Arrivals to Zambia by Point of Origin in 2003

Country of Residence	Total Arrivals
Southern Africa	274,701
East Africa	40,644
North Africa	668
West Africa	1,428
Central Africa	54,361
Europe	133,087
America	34,682
Asia and Oceania	37,956
Total	577,526

Source: MTENR 2004

In addition to these international arrivals there is a significant volume of domestic tourism with expatriates probably forming the greatest part of this market segment.

The best available data to show which destinations these tourists visit is from ZAWA park entry statistics. In 2003 (last available statistics) visitor numbers and estimated associated income were:

Table 2 Visitor Numbers and Estimated Income to Five National Parks in Zambia in 2003

National Park	Size (sq km)	Total visitors	Estimated Total Income (US\$)	Visitors per sq km	Income US\$ per sq km
Victoria Falls and Mosi-oa-Tunya	70	114,788	\$30,000,000	1,640.00	\$428,571
South Luangwa	9,050	18,712	\$3,600,000	2.07	\$398
Lower Zambezi	4,092	3,631	\$2,172,000	0.89	\$530
Kafue	22,400	2,619	\$1,440,000	0.12	\$64
Kasanka	430	1,127	\$90,710	2.60	\$210
TOTALS		140,877	\$37,303,000		

Sources: DSI 2004, KTL Annual Report 2004

No data was available for other parks for 2004 but figures would be lower in visitor numbers and income. For example, North Luangwa received 148 visitors in 2000 (ZAWA 2004).

Although these figures give some indication of the spatial distribution of tourism in Zambia, they do not show a complete picture as they do not indicate the time spent in each park, the amount of income generated in the area, the percentage of tourists visiting more than one park or the whereabouts of the high apparent percentage of tourists who did not visit any of the listed parks. Holiday tourists who may not be captured include visitors to national parks not listed, safari hunters (activity takes place only outside national parks), visitors to non-wildlife attractions such as historical sites and waterfalls outside national parks, visitors to wildlife areas not designated as national parks (e.g. Bangweulu, private game ranches), tourists essentially in transit, low budget travellers who avoid park entry fees, visitors solely to cultural attractions, visitors describing themselves as tourists but actually visiting on business or short term work.

This “missing” group of visitors is unfortunate from the analysis viewpoint as they undoubtedly include existing and potential clientele for CBT enterprises located outside the areas for which data is available. It is clear, however, that the Livingstone area (Victoria Fall and Mosi-oa-Tunya) dominates in visitor numbers.

There is remarkably little information available on CBT in Zambia, but from the information gathered for this study it is apparent that its share of bed nights and income is extremely small as is its marketing profile.

3.4 Policy and Legal Framework

3.4.1 Tourism Policy

The Tourism Policy for Zambia was developed between 1997-9 but only published in a form accessible to stakeholders and made publicly available from MTENR in 2005. In summary this document states that due to its concentration of in rural areas, the employment opportunities created, its ability to act as a development catalyst and the economic multiplier of its largely export income, tourism is expected to play *“a key role in the national economy as a source of economic growth, provider of jobs and income”*. Furthermore, that tourism is *“pivotal to bringing development... and poverty alleviation in rural areas”*. The mission stated for the tourism sector is *“to contribute sustainably to the economic well-being and enhanced quality of life for Zambians through Government led, private sector driven, quality product developments that are consistent with the protection of the unique natural and cultural heritage”* (GRZ 1997).

In relation specifically to local community involvement in tourism the government aims to:

- Redistribute both the opportunities to participate in tourism growth and access to the benefits from it, towards Zambians.
- Diversify the tourism product from being mostly wildlife based into other products including... culture and heritage, traditional ceremonies... community based tourism.
- Promote proper investment incentives in ... cultural tourism.
- Increase local involvement in suitable opportunities.
- Involve full participation of local communities in the development of national parks, game management areas and heritage sites.
- Encourage local communities to organise themselves to effectively participate in the tourism industry and enter partnerships and agreements with commercial investors.

Policy for funding the tourism sector includes the Tourism Development Credit Facility (TDCF) as *“a source of soft loans to local investors and local communities”*.

There are other relevant policies being formulated to promote community participation in tourism and wildlife management, such as ZAWA’s proposed Community and Game Ranching Policies. These proposed policies have been heavily criticised, however, on the basis that they *“are highly retrogressive to economic growth, and ignore basic economic principles and the experience of best practice”* (DSI 2004).

3.4.2 Strategies and Tourism Objectives

The Government is in the process of finalising a new set of Strategies and Tourism Objectives to implement its tourism policy from 2006 to 2009. A set of Proposed Strategies and Tourism Objectives 2006-2009 was commissioned by MTENR from Robins Development Associates Ltd and funded by the Japanese International Cooperation Agency (JICA). Although this document has not been ratified and will probably go through some revision, it provides a good guide on the direction being taken by the Government. CBT and supporting roles that can be provided to tourism by communities are specifically mentioned (highlighted in italics).

Key objectives listed are:

- Growth of tourism income from 546,000 arrivals per annum to 1,000,000 by 2009.
- Growth of tourism earnings from US\$133 million p.a. to US\$210 million p.a. by 2009.
- Growth of employment in tourism from 16,458 direct jobs to 24,800 by 2009.
- *Increase of local supplies to the tourism industry.*
- Training personnel through Hotel and Tourism Training Institute and in-service schemes.
- *Encouragement of communities to play a role in tourism development and management and secure a fair share of its benefits.*
- Benefits from tourism to be sustainably and fairly distributed.

Significant strategies proposed to achieve these objectives are:

- Public sector agencies to shift their emphasis from restraint to facilitation of the tourism industry.
- ZNTB to be streamlined into a “lean marketing machine” with regulation and licensing moved to the Department of Tourism (DOT).
- Co-ordination of public and private sector interests in joint promotional activities.
- TCZ to have first class secretariat and sound financial base supported by government matching funding from the private sector.
- Revival of Inter-Ministerial Committee for Tourism for better progress on cross-ministerial issues.
- Development of more accommodation and activities in and around Livingstone to meet demand.
- Townscape and landscape improvements to Livingstone.
- *Encouragement of visitors to Livingstone to explore more of Zambia including CBT Products.*
- Extensive development of Kafue National Park (KNP) with creation of a “critical mass” centre around Lake Itzhi-Tezhi.
- Develop a second tourism activity complex (to Livingstone) at Lake Kariba.
- Inclusion of the far north of Zambia (Lusenga Plain, Mweru Wantipa, Sumbu National Parks) as an area of priority tourism development.
- Financing of strategic action plan implementation by government 10%, Donor assistance 20%, and Private sector investment 70%.

Source: JICA 2005

MTENR also requested a CBT mission from the World Tourism Organisation (WTO) to develop recommendations on an approach for communities to develop and implement tourism. The 10 day mission was undertaken in December 2004. The report identified government, some donor and NGO stakeholders, documented two CBT enterprises (Chiawa and Kafumba Kwale) and potential attractions in areas visited. Field visits and analysis were confined to Lower Zambezi, Mumbwa, the Copperbelt and Kasama. There are no CBT initiatives in the Copperbelt and Kasama which are very marginal holiday destinations in Zambia. WTO concluded that CBT has “great potential” and proposed a macro level approach by MTENR to engage hundreds of communities across Zambia through a Village Action for Sustainable Tourism (VAST) ST ~ EP Project¹. *The findings of this study strongly suggest that such an approach to CBT is unrealistic and inappropriate.*

¹ Sustainable Tourism – Eliminating Poverty (ST ~ EP) is a WTO programme responding to the UN Millenium Development Goal to halve extreme poverty by 2015.

3.4.3 Legal Framework

The ***Tourism Act (1979, as amended 1985)*** is the principal Act governing the industry. It sets out the terms and requirements for licensing all tourism enterprises. This Act is in the process of being replaced by a new Tourism and Hospitality Bill currently before Parliament. Whilst the stated objectives of the new Act are to enhance investment and development of the tourism sector, the private sector views the current draft as being “government by roadblock” i.e. over-regulatory, unworkable, regressive, and lacking any positive contribution to the industry (Pers. Comm.).

The ***Zambia National Tourist Board Act*** is awaiting approval by Parliament. Under the terms of the new Act ZNTB will focus only on marketing, with all regulatory functions handled by the DOT.

The ***Zambia Wildlife Act 1998*** created the parastatal Zambia Wildlife Authority (ZAWA) to succeed the National Parks and Wildlife Service. Under the Act ZAWA regulates the management, conservation and utilisation of Zambia’s wildlife and National Parks.

The ***National Heritage Conservation Commission Act 1989*** regulates the conservation and management of identified national heritage sites through the NHCC.

3.5 Institutional Framework

3.5.1 Government

All government departments with significant roles in the tourism industry fall under the ***Ministry of Tourism, Environment and Natural Resources (MTENR)*** following the merger of the Ministry of Tourism and the Ministry of Environment. These include ZNTB, ZAWA and the Museums Board.

The ***Department of Tourism (DOT)*** carries responsibility for management and implementation of the tourism policy. The Department is also responsible for the implementation of regulatory and legislative frameworks for tourism development. Interviewees at the Department indicate that DOT is of the view that a private sector development programme approach to CBT is not viable. Reasons given were that the private sector is highly fragmented and disorganised, very few commercial tourism companies support CBT, lodges exclude village visits, there is an antagonistic relationship between the industry and communities, CBT is not enterprise as socio-cultural objectives should be included, outsourcing community tourism assets (e.g. lodges) is against policy directives and the policy and legal framework cannot be influenced without government taking the lead in CBT development (DOT Pers. Comm.). DOT does not consider licensing of CBT necessary. It also argues that CBT should be developed through a Taskforce Committee using DOT regional offices to undertake outreach to develop capacity in communities to establish CBT co-operatives.

Regional Tourism Development Offices are located in Lusaka (Lusaka, Central and Eastern Regions), Livingstone (Southern Regions), Ndola (Copperbelt, North-western Regions) and Kasama (Northern and Luapula Regions). These 4 offices are tasked with developing an inventory of tourism attractions, assessing tourism potential and making recommendations on regional tourism development. There is particular emphasis on community support roles for tourism in agriculture. A lack of travel funds and transportation, however, severely limits the capacity of regional staff to visit communities and explore tourism potential (DOT Pers. Comm.). It has been suggested that regional offices could facilitate both CBT product development and tourist bookings (WTO 2004). *In view of key lessons learnt locally and regionally (see sections 4 and 5), it is highly questionable whether MTENR should be (even if better resourced) actively engaging in CBT product development let alone tourist bookings as success correlates to industry not government ‘champions’.*

The ***Tourism Development Credit Facility (TDCF)*** is another key MTENR programme of potential relevance to CBT. It is administered by the Tourism Development Section in the DOT. TDCF was introduced in 2004 with a budget of ZMK5 billion (approximately US\$1.2 million) from the Ministry of

Finance and National Planning (MFNP). It received applications for ZMK120 billion but few communities applied directly for loans. Only one loan to date has been awarded to 3 community "Bushcamps" in the Luangwa valley that was secured by the Wildlife Conservation Society (WCS). The new CBT enterprises have been unable to service or repay the loan during the stipulated period (DOT Pers.Comm.). It is emphasised that private sector applicants plan to engage community members in their projects. The TDCF budget is fixed at ZMK5 billion for 2005 but an increase in budget support from MFNP to ZMK10 billion has been requested for 2006.

The TDCF offers 3 levels of loans summarised in the following table.

Table 3 TDCF Loan Conditions

Size of TDCF Loan	Amount (US\$1 = ZMK4,800 approx.)	Interest	Grace Period	Payback
1) Micro	ZMK1 - 50 million	5%	3 months	12 months
2) Small	ZMK50 - 150 million	10%	6 months	2 years
3) Medium	ZMK150 - 300 million	15%	12 months	3 years

Applicants must file a detailed proposal with business and marketing plans and identify any role for local participation and benefits. An environmental impact assessment may also be required.

Seventy-eight loans have been disbursed to date. When asked about the rate of TDCF loan repayments, the MTENR Tourism Development Section admitted challenges and insufficient monitoring but offered no specific information (DOT Pers. Comm.). No other information regarding actual funded projects (location, type etc.) and monitoring and evaluation was volunteered. DOT did admit an external evaluation of TDCF was required.

Overall, it appears that the Tourism Policy directive for the TDCF to act as "a source of soft loans to local investors and local communities" is not being met. Firstly, it would appear that the loan conditions are not "soft" as the interest rates are high and the grace and payback periods short. Secondly, only 1 out of 78 loans has been given to a community tourism project. Moreover, the appropriateness of MTENR engaging directly in the provision of credit for micro to medium-scale private sector tourism development is questionable. It would have been perhaps more pragmatic and effective for the MFNP TDCF funds to have been outsourced to microfinance and/or other financial institution(s) and for the financing to have been a revolving fund.

A programme with similarities to the TDCF in Namibia ran into challenges as it was over ambitious. The DOT Officers lacked grant making skills and CBT enterprises exploited a lack of information sharing by the DOT, donors and investors so that situations of 'double funding' arose. To mitigate this situation it was recommended that a 'clearing house' committee to consider project proposals be set-up (Dixey 2002).

The **Ministry of Community Development and Social Services** is interested in promoting cultural tourism. Priorities include the rehabilitation or construction of cultural villages, arts and crafts centres and cultural exchanges. The Ministry views opportunities as the development of traditional festivals as tourism attractions and quality improvement of arts and crafts that reflect the cultures of Zambia. The regional office in Livingstone is mobilising resources to revive Maramba Cultural Centre on a new site to provide entertainment and demonstrations of cultural activities to Zambians and tourists. Government has pledged ZMK450 million (US\$100,000) but ZMK670 million (150,000) is needed. The management is likely to be outsourced but the organisational set-up has not yet been decided. There is political pressure to revive the centre (Kamwanya Pers. Comm.). Sun International is interested in the resurrection of the Centre and sent District Officers to South Africa to visit Sun City.

The **Zambia National Tourist Board (ZNTB)** is charged with marketing Zambia as a destination. ZNTB used to also be responsible for licensing tourist enterprises and collecting statistical data on tourism, but these functions are being transferred to the DOT. ZNTB promotes Zambia as “*the Real Africa*” and “*home of the Victoria Falls and other great adventures*”. The main focus of ZNTB’s activities is the international high-yield market. Livingstone and the Victoria Falls are promoted as the gateway to Zambia. The “Visit Zambia 2005” campaign includes celebrations of the town’s centenary and 150 years since the explorer David Livingstone first sighted Victoria Falls.

Wildlife tourism, National Parks, safaris, walking safaris (pioneered in Zambia) and lodges dominate ZNTB’s marketing efforts. Domestic tourism has traditionally been weak in Zambia. A recent domestic marketing campaign has included television programmes, competitions for travel prizes and poster campaigns and has focused on waterfalls in northern Zambia. No information on the impact on tourism demand of these ZNTB campaigns is available and their effectiveness is subject to debate.

ZNTB’s promotion of CBT is extremely limited. It has an internal list of 8 ecotourism products², of which only 4 are CBT - Muwele, Mukuni and Kawaza Villages and Chiawa Community Campsite. This research shows that in addition to these, there are over 20 other CBT initiatives not networked to MTENR and ZNTB. CBT enterprises meeting a basic standard (to be defined) could be marketed by ZNTB in the form of a brochure (including a map), posters and details posted on the ZNTB website. This would be politically expedient although the effectiveness of this promotional strategy should be carefully considered. There has been no market research undertaken in Zambia of how different market segments learn of tourism attractions.

ZNTB does profile Zambia’s cultural heritage, annual festivals and ceremonies such as the Kuomboka in Barotseland that are open to tourists. Although there is no specific data available on tourism attendance to traditional ceremonies, it would appear from consultations with the private sector that in actuality very few tourists attend and that it is a very low volume special interest niche tourism activity. Furthermore, that *even if there was increased promotion, training and infrastructure development for cultural festivals and ceremonies, it is very doubtful as to whether this would result in higher tourism volumes and the emergence of commercially viable tourism businesses.*

The most commonly cited reasons given for low tourist attendance to cultural festivals include geographical remoteness of event locations, no set annual event dates (often dependent on the rains), lack of evident tradition (e.g. community members wearing modern clothing), lack of interpretation (e.g. presentations in local languages), risks (such as the presence of drunkenness and theft) which relate to the fact that cultural festivals in Zambia are a local not a tourist event. Illustrative examples in 2005 are that the most famous festival, the Kuomboka, did not happen due to poor rains and only a handful of tourists attended the Kairara Gova traditional ceremony in the Lower Zambezi even though local lodges gave financial contributions to the event (Tourism Companies Pers. Comm.).

During consultations with commercial tourism companies, it was very clear that many private sector operators question the purpose and effectiveness of ZNTB which is in effect a compulsory government run marketing scheme funded by fees, and over which the industry exerts no control or influence (Pers. Comm.). ZNTB has been unable to effectively integrate with the private sector or collect accurate statistics on tourism due to a poor working relationship with the industry (ZNTB Pers. Comm.).

The **Zambia Wildlife Authority (ZAWA)** is a semi-autonomous statutory agency mandated to manage the conservation and utilisation (both consumptive and non-consumptive) of wildlife and National Parks. ZAWA has responsibility for regulating the formation and operation of Community Resource Boards (CRBs) in Game Management Areas (GMAs) and other “Open” areas as well as a duty to devise and implement sustainable management plans for National Parks. ZAWA collects

² *Eco-Tourism Products Found in Zambia* by Patience Tropo, ZNTB, 04/03/2004.

revenue from park entry fees, vehicle and aircraft landing fees, tourism concession agreements (TCAs), bed night levies and hunting licenses but due to low tourism volumes is heavily dependent on overseas development assistance. Some revenue is shared with communities through CRBs but there is a mixed history of both collaboration and disagreements between ZAWA and CRBs.

The highly centralised nature of ZAWA is a key challenge to unlocking the potential of the wildlife and tourism sector. The agency is top heavy and operations and resources are not being decentralised to the field. Its policy and management capacity is also major risk factor in the growth of Zambia's wildlife and tourism sector. Investors lack confidence in ZAWA's ability to provide infrastructure and a quality wildlife resource, be genuine development partners, and administer the sector in a manner that is even handed, positive and reduces bureaucratic transaction costs. Whilst some progress has been made, opportunities to create a forward looking policy environment that encourages landholder and foreign investment is not being taken, and petty constraints that reduce (rather than add) value are retained (DSI 2004).

ZAWA is involved with CBT in GMAs but does not have full knowledge of all existing and planned enterprises. ZAWA's Commercial Services Section, GMA Directorate, park and extension staff are currently involved in CBT in the following ways:

- Issuing of tourism concession agreements (e.g. the lease for Dudumwenzwe Campsite in Kafue National Park).
- The collection and banking of tourist payments for CRBs at Lochinvar Community Campsite although the campsite is likely to be leased to a tourism company in the future.
- Ensuring accountability of CBT enterprises run by CRBs although this is constrained by a lack of man power and resources.
- Facilitating communication between CBT enterprises and safari hunting outfitters to prevent land-use conflicts in GMAs.
- Mediating between CRBs and tourism companies to address conflicts.
- Advising communities on fair deals in business partnerships.
- Providing radio communication for tourist bookings.

CBT appears to fall between 'the stools' in ZAWA as it is relevant to the Commercial Services Section, the GMA Directorate and Tourism Development. ZAWA recognises some of the challenges in CBT such as the need to develop new community institutions (e.g. trusts) as it is problematic for CRBs to own assets, the lack of capacity in CRBs to manage business, the danger that only the elite benefit, potential conflicts between CBT and hunting companies, and poor product quality. ZAWA does not consider it appropriate for CBT enterprises in GMAs to pay fees as they are the land owners (Pers. Comm.). It is interesting to note that ZAWA Commercial Services is supportive of business partnerships between communities and tourism companies unlike the DOT who view it as contradictory to tourism policy directives. This is perhaps because ZAWA is strongly aware that community revenue from tourism must be diversified away from hunting and that tourism managed by communities can fail.

The **National Heritage Conservation Commission (NHCC)** is responsible for the conservation and management of identified national heritage sites including sites of natural, cultural and historical importance with basic funding from Government. Many heritage sites are considered to have high tourism potential and offer opportunities to involve communities as guardians of their own heritage and generate economic benefits (WTO 2004). *CBT development at heritage sites must proceed with caution, however, as in the case of Chipundu, for the enterprise to be feasible the product must meet tourism demand, there are many pitfalls and it is unlikely to ever generate significant community income* (Hawkins 2005).

The **National Museums Board (NMB)** is the statutory body responsible for the management of museums and also supports some independently managed museums with grants. NMB would like to see at least one museum in each of the 9 provincial capitals.

The **Hotel and Tourism Training Institute (HTTI)** is set-up as a Trust. MTENR is represented on the Board of Trustees and contributes financial support. HTTI runs about 80 different programmes, including outreach training programmes for communities sponsored by the International Labour Organisation (ILO) (WTO 2004).

The **Environmental Council of Zambia (ECZ)** is responsible for the control of pollution and protection of the environment. ECZ is required to carry out an Environmental Impact Assessment (EIA) before any significant developments can commence. *In terms of CBT development, there are no exemptions and this presented a challenge in the case of Kafumbwa Kwale Community Lodge as the cost of obtaining an Environmental Brief was not in the project budget and cost US\$1,770.*

Local District and Town Councils are mandated with many tasks including land use planning and economic development at district level. Most are inadequately funded to be capable of exerting much influence or support to tourism developments, limiting their role to licensing and associated fee collection. *Their role is particularly underplayed in land use planning and CBT development in GMAs where ZAWA or traditional authorities exert more influence.*

The **Department of Civil Aviation (DCA)** falls under the Ministry of Transport and Communications and regulates all aviation activities in Zambia. Functions such as management of major airports and Air Traffic Control are contracted to National Airports Corporation. Zambia currently operates an “open skies” policy with checks for safety and quality of service and this has created a positive enabling environment for the provision of scheduled and non-scheduled air transport on which the tourism industry heavily depends.

Funding for these government and quasi-government institutions comes from a mixture of direct revenue collection (e.g. ZAWA park fees, NHCC admission charges), government budgetary allocations (always uncertain and inadequate for the tasks mandated) as well as donor support.

3.5.2 NGOs and Donors

International and local NGOs and donors have long played a highly significant role in the Zambian tourism industry. A few have engaged directly or through private sector partnerships in tourism to raise funds for their conservation objectives. These include:

- Kasanka Trust Ltd. (KTL)
- Save the Rhino Trust (SRT)
- Wildlife and Environmental Conservation Society of Zambia (WECZ)

Some NGOs and donors have assisted local communities to engage in tourism and craft activities but with mixed results. These include:

- African Parks Conservation (AP)
- African Wildlife Foundation (AWF)
- CARE (as USAID CONASA Consortium Partner)
- Choma Museum and Crafts Centre Trust Ltd. (CMCC)
- Danish International Development Agency (DANIDA)
- Danish Association for International Cooperation (MS)
- North Luangwa Conservation Project (NLCP)
- Source Connection Foundation (Netherlands)

- Wildlife Conservation Society of New York (WSC)
- Worldwide Fund for Nature (WWF)

The most significant impact of NGOs and donors, however, has been in the development of infrastructure to support tourism and the conservation of resources on which it depends.

Notable NGOs supporting Infrastructure Development, Tourism and Conservation

African Parks Conservation (AP) is an international organisation funded from various sources which has formed a partnership with ZAWA and the Barotse Royal Establishment (BRE) to uplift management, conservation and tourism development in Liuwa Plains National Park, Western Zambia. AP recently built 3 basic campsites – Katoyana, Kwale and Lyangu – that are now managed by local communities with ongoing technical advice from AP. The campsites are new but well run and profitable. AP has also encouraged the formation of performance groups to entertain campers and women's groups for craft product development. Initial training has been provided through Mumwa Crafts Association in Mongu. AP has identified various other potential CBT activities and community support roles including village tours, canoe rides, fishing and market gardening. The relationship between AP and local communities (exceptionally 20,000 people live inside Liuwa Park) is excellent. This could be due to the support of the King (*Litunga*) and as the campsites and other outreach work have brought fast, tangible benefits to local villages. It is important to note, however, that most community outreach work (including CBT) is undertaken by international volunteers whose experience and effectiveness inevitably varies.

African Wildlife Foundation (AWF) is supporting conservation work along the southern borders of Zambia as part of its Trans Boundary Natural Resource Management (TBNRM) project. This project aims to keep open wildlife corridors and encourage a trans-frontier approach to wildlife management and tourism development. AWF is supporting through technical advice the development of a trust model, exemplified by the Mukuni Development Trust (MDT), in Southern Province. It is also supporting the development of two cultural villages in Mukuni and Chiawa GMA, Lower Zambezi.

The ***Choma Museum and Crafts Centre Trust Ltd (CMCC)*** is a NGO that promotes cultural tourism and high quality crafts to tourists (about 50% self-drive) travelling between Lusaka and Livingstone (approximately 1,500 PCM). CMCC operations are organised and financed separated. The Crafts Development Division is a donor funded outreach craft product development project. The Crafts Trade Division is a self-sustaining department centred on an on-site shop and exports. The Trade Division, however, does not have the capacity to purchase all local craft produce which is sold on the local market. Export challenges include the appreciating Zambian Kwacha, a lack of storage space, pests which destroy baskets and container transport. The museum receives a maintenance grant from the NMB.

CMCC has applied to SEED to resource artisan training and product diversification as visitors want a larger range of crafts. It is seeking to diversify its income through leasing out a restaurant (CMCC Pers. Comm.). CMCC is also planning outdoor sculpture and ecological gardens. CMCC is heavily dependent on expatriate technical assistance from its long serving Dutch Advisor in marketing, management and design.

Conservation Lower Zambezi (CLZ) is an NGO formed by tourism companies in the Lower Zambezi. In the past CLZ focused on wildlife and habitat protection through support to ZAWA's anti-poaching efforts. In 2004 CLZ received funding from DANIDA to embark on an environmental education project. In 2006, CLZ will further develop its successful certified Safari Guide Training Programme to increase the number of local guides employed by tourism companies in the area. CLZ is next door to the Chiawa Community Campsite (CCC) in the Chiawa GMA and has offered to provide technical advice, for example, in infrastructure development, although this has not been taken up (CLZ Pers. Comm.). CLZ gives financial support to the Kairara Gova Traditional Ceremony on an annual basis.

Elephant Pepper Development Trust promotes elephant management strategies with local communities to reduce conflict between wildlife and people. The Trust develops chilli-based crop protection systems to increase food security, promotes chilli as a cash crop that is resistant to crop raiding by wildlife and provides international market linkages for fair trade chilli through Elephant Pepper Pty Ltd. The Trust has made Livingstone the base of the brand and is developing a large farm and processing centre that will also be a tourist attraction. The Trust is also considering developing CBT based on visits to local out grower farmers.

International Union for the Conservation of Nature (IUCN) has mainly provided technical assistance in the preparation of management plans for protected areas and support to community based natural resource management (CBNRM).

Kafue Anti-Poaching Company (KANTIPO Ltd.) was established in 1996 by tourism operators in Kafue National Park. KANTIPO gave ZAWA logistical help in resource protection, mapped poaching and started income generating activities for local communities. KANTIPO ceased operations in 2001 as tourism companies could not work together and the Kafue Emergency Natural Resources Plan was awarded to another agency.

Kasanka Trust Ltd. (KTL) manages Kasanka National Park in the Bangweulu area on behalf of ZAWA and operates tourism (2 lodges in the park, campsites plus Shoebill tented camp in the nearby Bangweulu wetlands) to sustain management costs. Additional funding comes from overseas donors and a sister Trust in the UK. KTL runs an extensive community development and conservation education programme. Due to its strong commitment to support local communities and as it is the only tourism operator in the area, KTL is in the unenviable position of supporting 4 CBT projects, none of which the Trust advised the establishment of. These include Chipundu village adjacent to the Livingstone Memorial (self-started CBT project), Nakapalayo Village Tourism Project in Chiundaponde (CBT idea prompted by a PCV), Nsoke Safari Camp near Bangweulu wetlands (an initiative of the CRB and WWF) and Muwele Cultural Village (funded by WWF). In an area of low tourism volumes, the feasibility of these CBT businesses is questionable (see Section 4). KTL has, however, provided technical and in-kind financial assistance to these projects. This includes advice from KTL community outreach staff and a UK Masters research student who assessed the feasibility of CBT in Chipundu, providing in-service lodge training for Nakapalayo community members as well as a flush toilet set and cement for the signpost. KTL also disseminates information/ markets 2 of these projects to visitors and guidebook writers.

North Luangwa Conservation Project (NLCP) is funded mainly by Frankfurt Zoological Society and Conservation Foundation Zambia. NLCP has successfully supported ZAWA to implement effective management in North Luangwa National Park (NLNP) since the late 1980s. The Project recently reintroduced Black Rhino into NLNP in a bold attempt to re-establish the nationally extinct species. NLCP funded the construction of Natwange Community Campsite for self-drive tourists in Mukungule GMA that is operational although income generation is very small due to low tourist volumes.

South Luangwa Conservation Society (SLCS) was formed and funded by tourism operators to uplift wildlife protection in South Luangwa. SLCS now receives funding from other sources and is broadening its activities into conservation education.

West Lunga Trust (WLT) is a new NGO largely modelled on KTL, based in Mwinilunga District of North Western Province that is promoting CBNRM in the area. WLT has not received any external assistance. It is keen to develop CBT such as adventurous canoe safaris on the West Lunga and Kabompo rivers but this is constrained by its remote location and poor infrastructure (Pers. Comm.).

Wildlife Conservation Society (WCS) is an American NGO that has a high profile in Zambia and the USA. It funds various programmes and has recently become involved in CBT. A MTENR TCDF loan was obtained to construct 3 community "Bushcamps" in the Luangwa valley. The new enterprises have been unable to service or repay the loans during the stipulated period. The investment was not initially linked to the private sector and WCS projects tend to feature donor subsidies.

Wildlife and Environmental Conservation Society of Zambia (WECZ) is a small local NGO currently experiencing internal organisational issues including falling membership, staff shortages and a lack of resources. The Society engages in environmental education. WECZ operates two wildlife camps restricted to members only: Chibila Camp on Lake Itzhi Tezhi near the southern sector of Kafue and Kafwala Camp near the northern sector of Kafue National Park. A WECZ riverbank site (Wildlife Camp) opposite South Luangwa National Park is leased to Lupande Safaris.

Worldwide Fund for Nature (WWF) is a high profile NGO in Zambian conservation engaging principally in wetlands areas with local communities. WWF has been the most active NGO in CBT development country-wide under its Wetlands Project. It has given assistance to Muwele Cultural Village and Nsoke Safari Camp in the Bangweulu area as well as the Community Campsites in Lochinvar National Park and Chiawa GMA. None of these investments have generated any social dividend for the community and in Muwele and Lochinvar the projects have left disillusioned communities with defunct infrastructure (see Section 4). A WWF flagship has been the development of Mwanachingwala Conservancy in Mazabuka for conservation and ecotourism development. Over US\$500,000 has been invested in product development. The Conservancy, however, is mired in controversy and was violently opposed by some local villagers who felt their traditional lands for grazing were compromised (DOT Pers. Comm.). The project is not CBT and it is doubtful surplus wider community income will be generated from tourism. The commercial sustainability of WWF's tourism projects is highly questionable. WWF is also supporting the CBNRM Forum to improve coordination and advocate for community members interests in Lusaka. The Forum has not been meeting regularly, however, which has limited its effectiveness.

It is worth noting that as well as NGOs, most private sector operators in wildlife areas support wildlife conservation either directly or by funding local initiatives such as CLZ and SLCS.

Other NGOs supporting CBT Development

C.E.S.T. (Communities, Economies, Societies and Trusts) Charities Development Foundation is a newly registered NGO umbrella group encouraged by the Tourism Section of MTENR. The agendas of members vary widely but C.E.S.T provides a national forum and promotes the concept of a community trust as a mechanism to provide benefits to community members (WTO 2004).

Danish Association for International Cooperation (MS) provided volunteer technical advice and seed funding in the early days to both Kawaza Village Tourism Project (KVTP) and Nsendamila Village near SLNP. The former has been very successful and the latter (a cultural entertainment product) is no longer operational (see Section 4).

Sensitisation and Education through Kunda Arts (SEKA) is a small local NGO and theatre company based in Malambo adjacent to South Luangwa National Park (SLNP). SEKA uses a unique combination of interactive theatre for development and radio to address important social and environmental issues. SEKA programmes have included CBNRM, human wildlife conflict and anti-poaching. HIV/AIDS cuts across all programmes. SEKA has also been commissioned to produce plays for international environmental conferences. Some of these plays such as Save the Rhino have been performed for tourists in local hotels but no specific technical or financial assistance has been given for additional tourism activities yet. SEKA is planning and seeking technical assistance to establish a Cultural Centre in Nsendamila which would create income generating opportunities for the Malombo drama group, other performing artists and local craft producers. *This proposed Cultural Centre is of high potential as SEKA has excellent relations with the Luangwa Safari Association (LSA) and the site is in a prime tourist location near SLNP and lodges.*

Source Connection Foundation (SCF) is a small Dutch NGO that supports grassroots business initiatives through knowledge, training and education by sending Dutch volunteers abroad. SCF claims to have 'international community based sustainable tourism expertise' and recently registered

in Zambia. SCF is interested in replicating the successful Kawaza Village Tourism Project in Mfuwe in villages around Livingstone. SCF provides technical advice and Dutch volunteers to work with communities. Its efforts to date have focused on fly-in feasibility visits by senior management from the Netherlands, NGO registration and establishment of a country office in Lusaka, fundraising for organisational activities, recruitment and dispatching of volunteers to Zambia (2 to date) and consultations with 2 project sites: Simonga and Mandiya villages.

Simonga village had begun to develop a CBT village stay project supported by Jolly Boys International Backpackers in Livingstone. It is unfortunate that SCF's intervention in Simonga has caused conflict as there is a significant difference in opinion between SCF and Jolly Boys on how product development should proceed, particularly in relation to pricing and tourist's willingness to pay (Jolly Boys Pers. Comm.). Mandiya village does not appear to be a viable location and/or community for CBT development and neighbouring tourism companies have not been consulted.

Notable Donor Institutions supporting Tourism and Conservation

The Ministry of Finance and National Planning (MFNP) liaises with bi-lateral and multi-lateral donors. Poverty reduction is a cross-cutting objective of all funding agencies.

Danish International Development Agency (DANIDA) has been a champion of the development of CLZ's impressive conservation education centre in Lower Zambezi. It has also been a major funding agency for road rehabilitation thus tackling one of the major constraints on tourism development. DANIDA is also funding the Mumbwa CBNRM Programme that constructed the Kafumba Kwale Community Lodge near Kafue National Park. This CBT Project has, however, encountered various challenges. For instance the CRB could not legally obtain the title land deeds (and thereby lodge ownership) so a new Trust was set-up. Furthermore, the implementing agency, Development Services and Initiatives (DSI), has concluded that the community does not have the capacity to manage the tourist facility and is planning to lease the lodge to a private operator despite preliminary objections from the community (DSI Pers. Comm.). DANIDA is the key champion of the NRCF.

The **European Union (EU)** has supported many conservation and tourism projects in Zambia, foremost being the restructuring of the National Parks and Wildlife Service (NPWS) into the Zambia Wildlife Authority (ZAWA). The EU is also supporting the implementation of Community Based Natural Resource Management (CBNRM) through CRBs.

Norwegian Aid Agency (NORAD) continues to be a major supporter of ZAWA's conservation work, especially in South Luangwa and Kafue National Parks. NORAD also supports the National Heritage Conservation Commission (NHCC). NORAD is also interested in institutional development.

SNV Zambia has an emerging practice area termed Sustainable Pro Poor Tourism (SPPT) that is currently part of their Market Access for the Poor practice area (market linkages and rural enterprise development). SNV Lusaka and Mongu offices are active in SPPT. SNV's focus is advisory services to build the capacity of local organizations and the organisation has just started to work with ZNTB and TCZ. SPPT is not a major practice area in Zambia, hence SNV is likely to fall in line behind the programmes of larger donors such as USAID and the World Bank (SNV Pers. Comm.). SNV did sign a Memorandum of Understanding (MOU) with the World Tourism Organisation (WTO) to develop PPT. It is also important to note that SNV are very active in the East Africa region in CBT development. SNV were key supporters of the Uganda Community Tourism Association (UCOTA) and Cultural Tourism Programme in northern Tanzania. SNV Kenya is initiating a community based ecotourism programme focused on pastoralists in Nanyuki.

United Nations Development Program (UNDP) is supporting community participation in natural resource management. It has recently launched a multi-million US dollar Reclassification and Sustainable Management of Protected Areas Project which includes policy and institutional capacity building at ZAWA and MTENR. Specific project sites are Lower Zambezi and Bangweulu wetlands.

The Project is in the design phase and may involve CBT but a widely perceived lack of community transparency in the project areas is of concern (UNDP Pers. Comm.).

US Agency for International Development (USAID) has supported ZAWA directly with information and communications technology (ICT). It also supported the Community Natural Resources Management and Sustainable Agriculture (CONASA) Project under which a consortium partner, CARE, developed the Dudumwenzwe Campsite with the local community in southern Kafue. The campsite is no longer operational and it would appear that neither the project nor the investment can be salvaged. USAID has two new sister private sector development programmes that include the tourism sector: the Production, Finance and Technology (PROFIT) and Market Access, Trade and Enabling Policies (MATEP) Projects. This study was commissioned under the PROFIT Project and is of considerable relevance to MATEP as many of the recommendations regarding tourism in general and CBT in particular are highly relevant to market access for the poor and the creation of enabling environments.

World Bank is currently a major donor through the **Support for Economic Expansion and Diversification (SEED) Project**. The multi-million US dollar tourism component focuses on Southern Province and seeks to improve management of Kafue and Mosi-Oa-Tunya National Parks. SEED includes policy, regulatory and institutional support for MTENR and its agencies, tourism investment, capacity building, infrastructure and institutional support in Livingstone and the Victoria Falls area. A few SEED initiatives relate to CBT, including a craft survey and the upgrading of craft stall infrastructure in Livingstone town and at Victoria Falls.

SEED faces implementation challenges in the development phase due to bureaucratic procurement procedures and as project design is now out-dated (Pers. Comm.). Currently consultations are underway to overhaul the Project.

3.5.3 Communities

The term “community” can be quite nebulous. In practice communities are the people living in a geographic location. At the smallest geographic level there is one village with a village head. Each village usually belongs to a group of villages that form a larger community organised under a Chief or Chieftainship. At the next level there maybe a Paramount Chief for an ethnic or tribal group. The House of Chiefs in Lusaka advises the Government on community matters at a national level.

Community-based organisations (CBOs) for natural resource management have been promoted in Zambia since the early 1980s. Community based natural resource management (CBNRM) programmes were part of a backlash against the ‘fortress conservation’ approach to wildlife management, whereby protected areas were established and managed with little regard for local communities living in the area, with activities and resource use severely limited and policed. To alleviate existing or potential conflicts associated with ‘fortress conservation’ (such as lack of access for local people to the park’s wildlife, crop-raiding animals, poaching etc.), activity in surrounding Game Management Areas (GMAs) has increasingly focused on ensuring benefits for communities from national parks. For example, the Administrative Design for Game Management Areas (ADMADE) Programme promoted return of hunting revenues to local communities, job creation and anti-poaching around South Luangwa National Park. Hence tourism is used as a means to diversify livelihoods and risk albeit not replacing existing activities.

More recently policy has established community-based collaborative management of forest reserves. These initiatives have achieved limited success to date. Some suggest that this is principally because of reluctance by government institutions to delegate real responsibility to CBOs. This has been related to concerns about sharing regulatory revenues and because of a perceived and frequently real inherent weakness in administrative capacity at the CBO level. Further complications have been the slow emergence of a coordinated approach to natural resource management at the district level and changing policies on the roles of traditional rulers. In South Luangwa, successive political,

government and project administrations have varied the importance attached to traditional rulers, resulting in yo-yoed expectations and downstream conflict situations which has negatively impacted on tourism (Pope 2005). Traditional leaders are powerful in Zambia and several CBOs interviewed in the field cited interference by their chief as a constraint on organisational and enterprise development.

There is a range of legal organisational structures that CBT enterprises can be in Zambia. The legal forms have different advantages and disadvantages in relation to aspects such as the influence of traditional rulers, capacity to form private sector partnerships, trading, tax, liability, reporting, registration costs and ownership of assets (e.g. land). Many CBT micro enterprises in rural Zambia have no legal form, for example, they simply comprise of an informal project committee or a couple of individuals. Most are, however, registered with the local council as a CBO. There is a general lack of awareness in communities and amongst donor and NGO agencies of possible legal organisational structures for CBT as well as legal requirements to undertake tourism business (e.g. licensing). MTENR favours cooperatives and exemptions from tourism licensing (DOT Pers. Comm.). Possible structures are detailed below in alphabetical order.

Community Resource Boards (CRBs) are boards of representatives elected to represent a particular community (usually defined by chieftaincy boundaries) in matters of wildlife as defined under the 1998 Wildlife Act. The Act gives the CRB some responsibilities for wildlife management in Game Management Areas (GMAs) and Open Areas (not National Parks). A CRB is the body entitled to receive from ZAWA shares of revenue from wildlife such as hunting concession and licence fees. The Chief sits as the (non-voting) patron of the CRB with elected (voting) community members and representatives of the local council and other stakeholders as non-voting members. CRB's mostly have subsidiary **Village Action Groups (VAGs)** which are local elected representatives who deal with CRB issues affecting their locality and send representatives who make up the CRB itself.

The name "Community Resource Board" is misleading as the CRB has no legal rights in connection with resources other than wildlife. There has been considerable confusion as to status in law of a CRB. It is not a body corporate, partnership, association, cooperative or society but a board of representatives formed under the Wildlife Act. As such most people are of the opinion that a CRB cannot own land or carry out trading activities. A significant issue in CBT is that CRBs cannot obtain land title deeds and thereby own tourism infrastructure (DSI Pers. Comm.). There is also a question mark on the tax implications for CRBs. In practice CRBs have taken their own initiative to define themselves and many do carry on business such as CBT activities. For example, Nsoke Safari Camp near Bangweulu wetlands and Natwange Community Campsite by North Luangwa National Park are run by CRBs. The 3 Bushcamps in the Luangwa valley are joint owned by 3 CRBs and WCS.

ZAWA is meant to monitor CRBs but is highly constrained by a shortage of extension officers (ZAWA Pers. Comm). It is generally acknowledged that CRBs have serious capacity constraints and funds received are often mismanaged and not used effectively for community development.

Companies Limited by Guarantee are non-profit companies where the guarantors (as opposed to shareholders) are required to guarantee a minimum of ZMK2,000,000 (about US\$520) each but cannot be liable for more than this amount. The company operates similarly to a company limited by shares except that it cannot distribute profits or surpluses as dividends and should it be dissolved the assets must be used for a charitable purpose similar to the company's original purpose. The costs of setting up are considerable as are the annual requirements but the set-up supports a free range of asset ownership and commercial activities as well as consideration by the government for tax free charitable status.

Companies Limited by Shares are the most commonplace form of commercial organisation allowing for profits to be distributed to shareholders (after tax). Shareholder's liability is limited to their shareholding. Companies can buy and sell land and other assets and are run by their board of directors as elected by shareholders. There are considerable costs involved in setting up a company

and filing the required annual returns for company registration and tax purposes which can be a burden on smaller CBOs.

Cooperatives are mainly used in the agricultural sector and are legally the same as societies (see below). They allow individual members to group together for the purpose of acquiring inputs and marketing produce. There is a 4 tier supporting structure where Primary Cooperative Societies (PCSs) are formed by 10 or more members under the laws governing societies. These can affiliate to their District Cooperative Union (DCU) if it exists, and thence (or directly if no DCU) are affiliated to the Provincial Cooperative Union (PCU) which in turn is affiliated to the Zambia Cooperative Federation (ZCF). Cooperatives are not restricted to agriculture and some branch out into other income generating activities.

Joint Forestry Management Committees (JFMCs) are similar bodies to CRBs but established under the Forestry Act for the purpose of integrating communities into forest management. It has been widely proposed that JFMCs be combined with CRBs to avoid having an excessive number of resource management committees each with their own elections etc.

Societies are non-profit organisations registered with the Registrar of Societies, but can be de-registered at the Registrars discretion. There are requirements for a minimum membership of 10 and annual renewal of individual membership and re-registration of the society with modest fees payable. Societies may hold bank accounts and trade and must be governed by a constitution agreed by the members. They must hold an annual general meeting, and all decisions must be taken by a majority of members voting out of a minimum of 10 members. The assets of the society belong to the members and can be distributed to them upon its dissolution. They can also benefit personally from the society's activities. However the members carry unlimited personal liability for the society. Many so-called Associations and Clubs are legally registered as societies. Muwele Cultural Village near Bangweulu wetlands is registered as a society although as it is receiving very few visitors it remains to be seen whether the society will pay the renewal fees in the future.

Sole Traders and Partnerships engaged in any commercial activities need to be registered by the Registrar of Companies under the Business Names Act, although in practice almost every rural Zambian citizen trades on a small scale as a sole trader without registration. Most CBOs engaging in trading activity without registering as a society, cooperative or limited company would probably be legally considered as a partnership if an issue of liability arose. The severe legal drawback of being a partnership is that each partner is joint and liable for all the liabilities of the partnership up to his or her whole wealth.

Trusts are structures into which assets are transferred by trust-givers who thereby surrender their control and rights over such assets. These assets are then managed by independent trustees for the purpose specified in the trust's constitution. Under Zambian Law the trust set-up does not confer many tax advantages over limited companies so that the trust is not usually the preferred structure for an actively trading organisation, but rather for holding assets (such as land and buildings). Trusts are increasingly being promoted as the preferred model for CBT development if considerable infrastructure is developed to ensure asset ownership and prevent interference from traditional chiefs. The trust model is also favoured as it can improve governance and transparency and enables business partnerships with the private sector. There are two notable examples of trusts in CBT in Zambia. The Mukuni Development Trust (MDT) in Livingstone and a trust being established in Mumbwa GMA by DSI with the community. The Mumbwa Trust was initiated on the suggestion of the Ministry of Lands who could not grant a land title to the CRB for Kafumba Kwale Community Lodge.

3.6 Stakeholder Relationships

Stakeholder collaboration is critical to CBT development and wider community benefit from tourism. Poor stakeholder relationships can block CBT and reduce net benefits to the poor from tourism. For example, in the Lower Zambezi the wider community is not seeing tangible benefits of consumptive

and non-consumptive tourism. This is because some photographic safari companies are not paying land user fees to ZAWA. The Wildlife Authority in turn has delayed paying the CRBs their share of hunting and bed levy revenue. Furthermore, when the CRBs receive funds there is no accountability for monies spent (CLZ Pers. Comm.).

3.6.1 Private Sector and Government

Interviewees from both sectors highlight that the private sector and Government (MTENR, DOT, ZNTB, ZAWA, and Local Councils) do not always have a constructive relationship. Interactions range from formal consultation to avoidance and antagonism. The Government regrets its perceived lack of influence over the private sector and has often demonstrated a poor commercial understanding of the industry. There has been an unfortunate politically driven characterisation (without supporting data) that tourism creates large profits which are remitted and spent overseas by its foreign owners. There are, however, strong arguments that the investment returns in tourism are too low to attract indigenous capital and that successful Zambian owners would be as likely to expatriate profits as non Zambians. Perhaps due to these sentiments Government continues to propose further regulation, control and centralisation contrary to the wishes of the private sector.

The private sector often perceive Government as a hindrance, interfering unnecessarily in their operations, taxing them and levying fees with no tangible positive returns.

“The other serious issue is ZAWA, who do not seem to be supporting either the local community or the tour operators in the area, and they are certainly receiving huge financial returns on the area from tour operators! We do not see any of the money we pay them every month come back into the area, where does it go???” Lodge Manager

Considerable Government investment has been put into tourism infrastructure since Independence in 1964, for example the construction in Mfuwe of the airport, road and bridge, and other investments and initiatives.

3.6.2 CBT and Government

The influence of Government on CBT is minimal. Little technical or financial support has been rendered to emerging CBT initiatives, with the exception of the MTENR TDCF loan to 3 “Bushcamps” in partnership with WCS and ad hoc advisory and communications support from ZAWA to CBT in GMAs (see section 3.5.1). DOT asserts that Government and NGOs are the most appropriate partners to develop CBT *not* tourism companies and CBT is not viewed as private sector enterprise (DOT Pers. Comm.). ZAWA has a mixed history of collaboration and disagreements with communities but acknowledges that fair business partnerships between tourism companies and communities may generate more income for local development (ZAWA Pers. Comm.).

The current system of licensing based on fixed fees should technically apply to CBT enterprises (some of which have received donor investments of between US\$10,000 – 50,000) but only 2 camps (Chiawa and Nsoke) have a ZNTB tourist enterprise licence. ZNTB has the task of marketing tourism products and has a particular responsibility from government policy to support CBT, yet it’s unaware of the great majority of CBT initiatives identified by this study. It is ironic that the few functioning CBT enterprises which ZNTB (as the licensing authority) is promoting do not have tourist enterprise licences to operate the services being promoted. ZNTB considers CBT enterprises to be “*below radar*” for licensing (Pers. Comm.).

The draft new Tourism and Hospitality Act did not initially appear to relieve this anomaly, but raised the stakes by imposing stiff legal penalties for any tourism operator (regardless of size and/or turnover) without all the correct permissions and licenses. This has been amended due to comments on the legal barriers it raises to small scale community enterprise, but it remains to be seen if the proposed provision of exemptions on application would be any more likely to bring CBT enterprises within the legal framework.

The issue of legalising CBT is acute as most commercial tourism operators surveyed require CBT enterprises to be legal if they are to do business with them, in part due to government regulation (e.g. the obligation that suppliers must hold Tax Clearance Certificates) and also client safety (e.g. the requirement for liability insurance). Furthermore, CBT enterprises themselves cannot enter into business partnerships with industry such as a Joint Venture (JV) unless they are incorporated and licensed. In addition, several profitable CBT enterprises expressed a desire to be registered legally in some form to prevent interference from local elites (see Section 4).

3.6.3 Tourism Industry and Communities

Most commercial tourism operators in Zambia realise that it is important for communities to benefit from tourism and wildlife to ensure conservation and the future of the tourism industry. The majority of tourism companies surveyed support local development projects and many are significant employers for nearby villagers. Several champion CBT enterprises and many others expressed a desire to involve communities more in their operation through CBT activities and other support roles (see Section 4). Good relationships between tourism companies and local communities are not well appreciated by MTENR due to poor communication.

Good relationships between the tourism industry and communities are constrained, however, by a range of problems that include:

- The poor attitude of some tourism operators to communities, particularly those where the owner is absent (CLZ Pers. Comm.).
- Poaching.
- Environmental degradation e.g. deforestation.
- The behaviour of some traditional rulers.
- Poor governance and accountability in communities.
- Poor communication, high community expectations and a lack of understanding of tourism.
- Lack of educated individuals in communities.
- Alcoholism and littering in villages.
- Crime.

These challenges are illustrated in comments made by tourism companies:

“The CRB structure throughout Zambia is not clearly defined nor is it well monitored or managed. Until the CRBs have better input from ZAWA and GRZ this will hamper development and communities will continue to not benefit properly from conservation or sustainable resource use.” Park Lodge

“The biggest headache, unfortunately, in our area is the traditional leader who does not support tour operators in the area, other than the ones there is personal financial gain from.” Lodge

“The expectations of the community (leaders and individual) are too high and this causes poor relations between the community and tourism operators. Also agreements between operators and the community are vague and un-enforced.” Lodge

Relationships between commercial tourism companies and communities are particularly strained in the Lower Zambezi and between rafting companies and the Mukuni Development Trust in Livingstone.

3.6.4 Natural Resources Consultative Forum

A new development that may offer a way forward for improved dialogue, coordination, information dissemination and partnership between Government, NGOs, donor agencies, the private sector and communities for sustainable development in the wildlife and tourism sectors is the Natural Resources Consultative Forum (NRCF). The Forum was initiated by Government and is supported by DANIDA. The secretariat is currently housed in DSI and has only one coordinator. Several Government ministries as well as some donors and NGOs participate in the Forum. Communities are represented through the CBNRM Forum. The NRCF is supporting new research into the economic value of the wildlife and tourism sectors with UNDP, GEF and the World Bank to advocate for more informed decision-making in policy, legislation and sector budget allocation. It is also promoting the development of trust models in Game Management Areas (GMAs) to prevent alienation of traditional lands and more equitable development.

3.7 Summary of Strengths and Constraints for Tourism in Zambia

Strengths:

- Exceptional quality and scope of wildlife
- Extensive protected areas
- Features of outstanding natural beauty
- Proximity to other regional destinations
- Hospitable people
- Peaceful history
- Favourable climatic conditions (especially June –October)

Constraints:

- Large distances between attractions
- Appreciating Zambian Kwacha
- High cost of material inputs
- Shortage of material inputs (e.g. periodic fuel shortages)
- High cost of transport
- Rising cost of park fees
- Poor relationship between government and private sector
- Poor cohesion and organisation within private sector
- Over-regulation and excessive bureaucracy
- Restrictive immigration of expatriate tourism professionals
- Limited transport infrastructure including international flight connections
- Poor communication infrastructure
- Poor governance and transparency in government and communities
- Perceived and actual corruption at all levels
- Lack of critical mass of tourism business
- Seasonality of many attractions
- Shortage of skilled labour
- Under-developed marketing strategies
- Limited marketable cultural heritage compared to some competitor countries

4. Community Based Tourism in Zambia

4.1 Definition of CBT

Community based tourism (CBT) can be defined as tourism which is owned and/or managed by communities and generates wider community benefit. For example, a proportion of profit generated by a community campsite supports a local development project such as a clinic or vulnerable members in the community. As the term CBT is relatively new to Zambia it is frequently misunderstood.

The term 'CBT' is commonly and erroneously interchanged with 'cultural tourism'. For example, museums present the cultures of Zambia but they are not usually owned and managed by communities. Nor is an upmarket lodge marketing a cultural product such as Songwe Point Village in Livingstone which is foreign owned. Tourists attend traditional ceremonies but currently there is no associated CBT and usually no trickle down wider community benefit. Some existing CBT is cultural tourism (e.g. Kawaza Village tour) but not all (e.g. Chiawa Community Campsite).

'Ecotourism' and 'sustainable tourism' can sometimes encompass CBT but not necessarily and these agendas are more focused on environmental protection than poverty reduction. For example, the Mwanachingwala Conservation Area (MCA) in Mazabuka developed by WWF is primarily for conservation and ecotourism development (WWF 2004).

CBT is often assumed by tourists to be 'responsible tourism' but this is not necessarily the case. CBT can have negative socio-cultural and environmental impacts and not generate any wider community benefit.

Tourism companies also misinterpret the term 'CBT'. For example, if a lodge takes guests to the nearby village to visit a school that the tourism company supports and no tour fees are paid to the community (but donations for the school are made by the company), this is not CBT but philanthropy/corporate social responsibility (CSR).

Individual micro-entrepreneurs in the informal sector, such as guides marketing township tours in Lusaka, canoe trips by fishermen in the Bangweulu wetlands or one-man cycle tours around Livingstone, are also not technically CBT but their participation in the tourism industry requires further consideration.

For the purposes of compiling the inventory, CBT was interpreted as tourism owned and/or managed by communities that is designed to deliver wider community benefit. Communities may own an asset such as lodge but outsource the management to a tourism company. Alternatively communities may not own the assets on which their tourism enterprise is based (e.g. land, campsite infrastructure inside national parks, national monuments) but are responsible for management and there is an objective of wider community benefit.

The specific focus of this study was CBT as no country-wide inventory and/or assessment had been undertaken in Zambia. However, CBT should be viewed as only one component in a broader approach called 'Pro-Poor Tourism' (PPT). PPT is defined as tourism that results in increased net benefits for poor people. PPT is not a specific product or niche sector but an approach to tourism development and management. It enhances the linkages between tourism businesses and poor people so that tourism's contribution to poverty reduction is increased and poor people are able to participate more effectively in product development (see section 5).

4.2 Inventory of CBT

Twenty-five CBT enterprises were identified across Zambia in 6 out of 9 Provinces (see map overleaf), although 2 are no longer operational:

Table 4 Existing CBT Enterprises Identified in Zambia

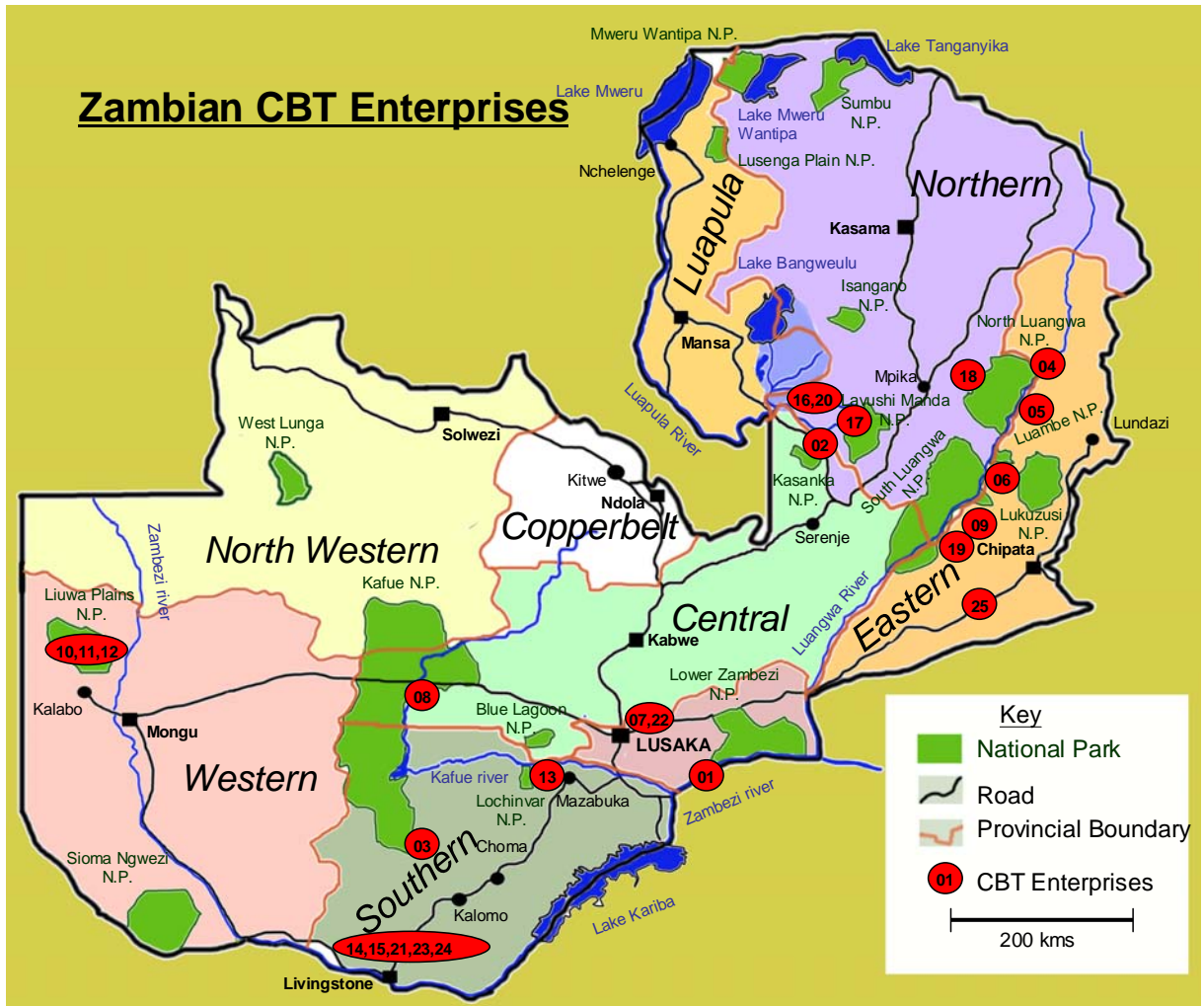
Number	CBT Enterprise	Location/Asset Base
01	Chiawa Community Campsite (CCC)	Lower Zambezi National Park
02	Chipundu Committee	Livingstone Memorial, Serenje District
03	Dudumwenzwe Campsite (<i>defunct</i>)	Southern Kafue National Park
04	Chikwa Bushcamp	North Luangwa National Park
05	Chifunda Bushcamp	North Luangwa National Park
06	Mwanya Bushcamp	South Luangwa National Park
07	Kabwata Cultural Village	Entertainment and crafts, Lusaka
08	Kafumba Kwale Community Lodge	Mumbwa GMA, by Kafue National Park
09	Kawaza Village Tourism Project (KVTP)	Village in Mfuwe, South Luangwa
10	Kwale Campsite	Liuwa Plains National Park
11	Katoyana Campsite	Liuwa Plains National Park
12	Lyangu Campsite	Liuwa Plains National Park
13	Lochinvar Community Campsite	Lochinvar National Park
14	Mandiya Village	Upper Zambezi, Livingstone
15	Mukuni Development Trust (MDT)	Village and curio market, Livingstone
16	Muwele Cultural Village	Village near Bangweulu wetlands
17	Nakapalayo Tourism Project (NTP)	Village near Bangweulu wetlands
18	Natwange Community Campsite	North Luangwa National Park
19	Nsendamila Cultural Village (<i>defunct</i>)	Entertainment by South Luangwa NP
20	Nsobe Community Safari Camp	Village near Bangweulu wetlands
21	Nsongwe Village	Village and curio market, Livingstone
22	Shantunka Village	Village stays, Lusaka
23	Simonga Village Tourism Project	Village stays, Livingstone
24	Simonga Village Visit Fund	Village tours, Livingstone
25	Tikondane Community Centre	Development projects, Katete

The highest concentration (28%) is located in Southern Province, most in and around the tourist capital of Livingstone. Eastern Province has the second highest concentration (24%) spread along the borders of South and North Luangwa National Parks. Northern Province has several (16%) located on the route between Kasanka National Park and Bangweulu wetlands. Lusaka Province features a few (12%) in the capital and in Lower Zambezi. Western Province also features 3 CBT camps in Liuwa Plains National Park (12%). Central Province only has a couple of CBT enterprises (8%) by Kafue National Park and the Livingstone Memorial. No operational CBT enterprises were identified in North-Western, Copperbelt and Luapula Provinces. This is unsurprising as these Provinces are marginal holiday destinations.

The CBT enterprises are found in the following types of location:

- Game Management Area (GMA) (11)
- Rural Village not in a GMA (8)
- National Park (5)
- Urban Area (1)

It is understandable that 44% of CBT enterprises are in GMAs as these border national parks which are tourist centres. It is surprising, however, that one-fifth (20%) are located within national parks as legally the community institutions cannot own the assets the tourism is based on.



4.3 Assessment of CBT

4.3.1. Description of Enterprises

1. Chiawa Community Campsite (CCC)

CCC was established in 1999 by Chieftainess Chiawa and community members. CCC is owned and managed by the Chiawa Community Development Association (CHICODA) which was registered as a Society with 10 members and holds the title deeds of the land. CCC is on a large site (1.3km of river frontage) in a prime tourism location, situated in Chiawa GMA close to the Chongwe Gate to Lower Zambezi National Park (LZNP).

The campsite was started with volunteer labour and infrastructure developed with ZMK6 million (US\$1,360) from the community share of LZNP bed levies. The campsite was officially opened in November 2000 by the Minister of Tourism. CHICODA received a grant of ZMK13 million (US\$2,950) from WWF in 2003 in the form of materials - a 5,000 litre water tank, water pump, timber and cement for the ablution blocks. WWF also provided business development training with ILO but no help with marketing. Local tourism companies and Conservation Lower Zambezi (CLZ) have offered free technical advice to CHICODA, such as foremen to oversee construction, which has not been taken up (Kiambi and CLZ Pers. Comm.). CHICODA applied to the TDCF for a loan of ZMK30,000 million (US\$6,800) in 2005 but was unsuccessful.

CHICODA leased part of the site to CLZ for US\$30,000 (CLZ Pers. Comm.). In order to lease the land CHICODA had to obtain a Certificate of Incorporation. CLZ assisted the registration in Lusaka through their procurement officer. The process was very bureaucratic and took months. If the time spent by the CLZ officer was valued, it would run into thousands of dollars (CLZ Pers. Comm.). CHICODA is also in discussion with Mazabuka farmers to lease another plot of land near LZNP for fishing chalets (CLZ Pers. Comm.).

CHICODA has also leased separate parts of the campsite to ChaChaCha Backpackers, SA Drifters and a private investor who developed Nyala Tents. The private investor paid ZMK8.7 million (US\$1,970) in 2005 for a 2 year lease but recently this has been changed to a joint venture agreement. Nyala tents and its associated infrastructure and hardware (valued at approximately US\$10,000) will become the property of CHICODA at the end of the agreement. The investor assumed the Association had all necessary legal papers but this was not the case. Hence he has assisted CHICODA to obtain an investment licence from the Zambian Revenue Authority (ZRA) and a ZNTB tourism enterprise license is awaiting ZAWA approval (Barrets Pers. Comm.). It remains to be seen whether the Association will file accounts to ZRA and this may undermine the partnership.

The site offers camping, one incomplete chalet (the other burnt down), unsightly concrete ablution blocks with piped water and flush toilets. The condition of the infrastructure is poor and there are safety risks as riverbank areas are not cleared of bush vegetation which impedes visibility of wild animals such as elephant which regularly stray into the campsite. The current campsite caretakers are untrained and food rations and salaries do not arrive on time (Barrets Pers. Comm.).

Most tourists (85%) who stay at CCC come with commercial tour operators such as ChaChaCha Backpackers (65%) and the overland company, SA Drifters (20%). Domestic and foreign self-drive tourists (15%) know about the campsite mainly through word of mouth. It is in guidebooks.

CCC received 781 tourists in 2004 and claims its annual gross turnover was US\$4,200. CHICODA states it made no net profit as income was spent on overheads and reinvested. This was not verified as their account books were destroyed in the chalet fire. Local tourism companies and CLZ, however, consider CHICODA mismanaged and the tourism operation not benefiting the wider community (Pers. Comm.). According to the constitution, profits are to be reinvested in small business start-up.

2. Chipundu Committee

The Chipundu Committee is based by the Livingstone Memorial in Kafinda GMA in Serenje District, in the northern part of Central Province. The Memorial is 35km from the Kasanka National Park gate and is a convenient stop-off for self-drive tourists heading to Bangweulu wetlands. Chipundu is where the explorer and missionary, David Livingstone, died in 1873 and his heart was buried under a Mpundu tree. Today a stone obelisk has replaced the tree as a memorial. The Chipundu Committee has received advice from Kansanka Trust Ltd. (KTL) community development extension officer.

There is confusion surrounding land tenure at Chipundu. The National Heritage Conservation Commission (NHCC) owns the Memorial site and the United Church of Zambia (UCZ) has responsibility for maintaining the Memorial and the larger area of land. Despite cautions from KTL and a UK Masters research student who looked at the feasibility of CBT in Chipundu, the Committee has recently gone ahead and constructed 2 chalets for tourists.

Tourism in the area is not of sufficient volume yet to generate significant income at Chipundu and a campsite and/or interpretation centre would have met tourism demand more than chalets, especially considering competition from nearby CBT enterprises (e.g. Nakapalayo Tourism Project). Land tenure issues may also undermine the success of the project (Hawkins 2005).

3. Dudumwenzwe Campsite

The Dudumwenzwe Campsite was established under the USAID Community Natural Resources Management and Sustainable Agriculture (CONASA) Programme about 78km from Kalomo in southern Kafue National Park (KNP). The campsite was developed from 2002 on the assumption that the National Heritage Conservation Commission and/or Sun International would make the Mulobezi steam train operational as the location is not easily accessible by road and is 120 km from Livingstone. The railway was not reopened. There were also wrangles as the project required implementation in Mulobezi in Western Province and Mumbwa in Southern Province. CONASA was not operating in Western Province so the Chief rejected proposals as no CONASA funds could be availed.

ZAWA advertised the lease for the campsite inside KNP and CONASA encouraged the CRB to apply. The CRB obtained the lease for US\$800 per year. In total approximately ZMK125 million (US\$28,400) was granted to the CRB Committee for campsite development. There were disagreements between CONASA and the Committee on suitable infrastructure development, particularly on the construction of chalets versus tents. Tents were provided for hire and a reception, kitchen, bar and toilets (flush and pit latrines) were built. Problems were experienced with the borehole for water supply. Moreover, there was a lack of accountability for funds spent by the CRB (CARE Pers. Comm.).

The plan to open the campsite in April 2005 did not happen due to a lack of management capacity in the CRB. In May 2005 a fire destroyed much of the infrastructure. The campsite remains non-operational and lease fees have not been paid for 2005 (ZAWA Pers. Comm.). The CRB are interested in a business partnership with a tourism company to re-open. This is very unlikely to happen as the campsite is in a very marginal tourism area and accessibility has worsened due to a collapsed bridge. Furthermore, the lease overheads to ZAWA are very high. It would have made more commercial sense to have located the campsite nearby in the GMA outside the park. This would have reduced overheads and been more attractive to tourists as they would not have to pay park fees.

This CBT project was unsustainable and it would appear that neither the campsite nor the investment can be salvaged.

4. - 6. Chikwa, Chifunda and Mwanya Bushcamps

Three 'It's Wild!' Bushcamps were set-up in the Luangwa valley by WCS (USA) with 3 CRBs in 3 chiefdoms using a loan of ZMK150 million (US\$34,000) from the TDCF. WCS subsidized transport and administrative support during project implementation. It is estimated that each Bushcamp cost approximately US\$17,000 (WCS Pers. Comm.). No loan repayments have been made to date (DOT Pers. Comm.). WCS is paying salaries and running costs - radio communications, management and transport support are provided through the Community Markets for Conservation (COMACO) programme in Lundazi (WCS Pers. Comm.) which is also subsidized. The business plans for the Bushcamps were not available.

The Bushcamps are jointly owned by the CRBs (65%) and COMACO (35%) who have signed a Memorandum of Understanding. The Bushcamps do not have tourism enterprise licenses yet but verbal permission was given for first year operations by MTENR (WCS Pers. Comm.). Bushcamp staff received in-service training at supportive commercial hotels and lodges. The Bushcamps will be open 5 months a year (June – October).

Each Bushcamp is exactly the same and features a camping area and 2 chalets. The chalet design was based on a commercial tourism operator's bushcamp not local people's ideas and may be challenging for the communities to maintain, especially after the rains. The camps were located in areas of low tourist volumes to have minimum environmental impact (WCS Pers. Comm.) and this will limit income-generation. The camps were opened in 2005 and are being promoted by WCS and a travel agent in Lusaka. As product development was not market-led, the travel agent will face challenges marketing the Bushcamps due to the remote location of Chikwa and uncompetitive pricing for self-drive low budget tourists (Bush Buzz Pers. Comm.). Tour operators also have concerns regarding communication of bookings, tourist safety and falling product quality (Pers. Comm.).

Chikwa Bushcamp on the border of North Luangwa National Park (NLNP) is too far off the main self-drive tourism route and has less wildlife. Less sophisticated but more chalets in traditional style could have been built that would have met market demand and been easier for the communities to maintain. The product is expensive for what it is and the level of service provided. Expensive equipment at the Bushcamps such as solar lights was not necessary (many up-market lodges use paraffin lamps at night). Finally, the Bushcamps should have been completed earlier in the year to coincide with the beginning of the tourist season. Marketing opportunities were missed and the Bushcamps will need to be subsidized in the rainy season (WCS Pers. Comm.).

There are also safety and liability issues as the Bushcamps offer wildlife walks in GMAs with CRB scouts carrying AK47s which is not the recommended firearm and the Bushcamps do not have liability insurance. Furthermore, Chifunda is in a prime hunting area and located only 4km away from a safari hunting outfitter. This has led to land use conflicts and the hunting concessionaire has blocked the access road. Chifunda is in the approved NLNP Management Plan (ZAWA 2004) but as the hunting company was not consulted on the Bushcamp development this broke the terms of the concession agreement (ZAWA Pers. Comm.). Mwanya experienced a similar issue but it has been alleviated through communication.

7. Kabwata Cultural Village

Kabwata Cultural Village is situated on Burma Road in Lusaka. Kabwata is home to artisans who reside in traditional houses and have an open air curio market. There are also cultural entertainment events held in a central arena. Kabwata was once part of a larger township during the colonial era and in 1974 the Government acquired the land for a cultural village and designated it a national monument. Artisans from all 9 Provinces were invited to make Kabwata their home.

Kabwata is managed by an association called Kabwata Visual Arts and Crafts Association (KAVIKA). It has 200 members who are individual entrepreneurs. KAVIKA was registered as a Society in 1996. Members retail curios on-site and sell crafts to other local retail outlets. No crafts are exported.

Management estimates that its customer base is 60% tourists and 40% local residents. In the peak season (March to July) approximately 1,000 visitors pass through the Centre. Income generated by the Association is only enough for welfare (e.g. funeral expenses) (KAVIKA Pers. Comm.).

Kabwata receives government support and has received financial assistance from the French Embassy, GTZ and other donors. It has a pick-up truck, a local restaurant and nursery school. Although Kabwata is well known (in guidebooks and by word of mouth) curio sales are facing increasing competition from new craft markets such as the weekly market at Arcades and monthly market at the Dutch Reformed Church.

8. Kafumbwa Kwale Community Lodge

Kafumbwa Kwale ('francolin scratching around') Community Lodge has been developed under the Mumbwa CBNRM Project, funded by DANIDA and implemented by DSI. The lodge is located on the river bank in Mumbwa GMA close to Kafue National Park. The current access route is from the old M9 road along a sandy track for 8km. Access could be shortened to 6.7km with realignment of the track. The track is in poor condition and crosses 2 river beds which will curtail the months the lodge can be open.

Construction commenced 3 years ago. The lodge has 2 en-suite chalets, a well equipped kitchen (including an electric fridge), bar and dining area, camping area and ablution block, a generator, water pump and boat for river launches. The lodge was constructed and equipped by a sub-contractor for US\$50,000. The camping ablution block is not yet complete.

There was four staff on-site. Three had received in-service training at Puku Pan Lodge for 2 weeks. The staff appeared to have little motivation to put the supplied grass on the roof of the camping ablution block. Staff had walked to Mukambi Safari Lodge on several occasions requesting food, fuel and radio communication (Mukambi Pers. Comm.). The walk through the GMA is risky as a tourist who got out of his vehicle was killed by a breeding elephant nearby in September 2005.

The lodge was built for the CRB but as the Ministry of Lands would not grant the CRB a land title, a trust has been set-up to own the assets. The CRB tried to manage the lodge but due to a lack of management capacity DSI is now recommending leasing the lodge to a tourism company. The community is reluctant to lease the lodge, as it has misperceptions of its income generation potential and it does not trust potential partnerships until legal ownership of the assets is resolved (DSI Pers. Comm.). DSI is recommending US\$500 rent per month plus a bed levy to be paid to the trust by a tourism company. It is not clear why the project did not commence as a joint venture project.

The trust does not have a tourism enterprise licence and expects a business partner to obtain this. The project had to pay, however, for an Environmental Brief from the ECZ to approve the lodge which cost ZMK7.8 million (US\$1,770) and had not been budgeted for.

The lodge is located in a prime hunting area and there is a conflict between the lodge and safari hunting outfitter regarding safety of tourists and lodge staff, particularly along the access track.

9. Kawaza Village Tourism Project (KVTP)

Kawaza Village Tourism Project (KVTP) is located in Upper Lupande, about 20km from the Mfuwe gate to South Luangwa National Park. KVTP started in 1997 when Robin Pope Safaris (RPS) took tourists to visit the village school. This worked well and RPS suggested to the community that they develop a tourism project for RPS clients to experience village life. Five chalets were constructed in 2 months with advice from RPS. MS donated US\$250 for the purchase of mattresses. Community members lent basins etc. to the Project to get started. Financial management training was received from ZAWA in 1997. Further technical advice has been provided by a MS volunteer and driver guides.

KVTP offers village tours that include the school, church, clinic and traditional healer. KVTP also offers traditional food, story telling and cultural entertainment (music and dance). Most visitors are day visitors but about a quarter stay overnight in the chalets or new camping site. The chalets are traditional mud and thatch rondavels, the bathing areas bush showers and the toilets pit latrines. There is also a traditional summerhouse (*Insaka*). RPS advised that no crafts should be sold on-site.

KVTP is well known locally and internationally and has become a CBT success story. It is on the internet (RPS website), in guidebooks and features in foreign newspapers (e.g. Penn 2005). It is marketed by many operators as an optional extra and receives most clients (85%) through cooperating tourism companies. Approximately 60% of visitors are up-market international fly-in tourists who book through RPS. About 20% are tourists on overland trucks and the remainder comprise of backpackers (5%) on mobile safaris, self-drive tourists (5%), development workers (5%) and overseas educational groups (5%).

KVTP is open 9 months a year (March - November) when the village is accessible. The number of visitors has been rapidly increasing. Client bookings from RPS and other operators have doubled since 2001. In 2004, KVTP received 453 tourists: 351 day visitors (77%) and 102 overnight visitors (23%) which generated US\$8,927 in gross revenue. Net profit was estimated at US\$2,250, about 25% of turnover, in 2004. In 2005, visitor numbers are much higher and KVTP expects to double its 2004 revenue.

KVTP gives direct aid (e.g. food and blankets) to the most vulnerable (e.g. orphans, elderly) in the community identified by the Committee. The percentage given in aid per year is not fixed and it is for members to agree on. In 2004, KVTP gave US\$400 (18% of net profit) to social welfare. It is worth noting that many tourists who visit KVTP make substantial donations to the Kawaza School Fund managed by RPS.

KVTP is based on communal land and a tribute (sum not specified) is given to Chief Nsefu who is the Patron. KVTP has 17 members (7 men and 10 women) and is managed by an elected committee. The administration and finances are kept at the school. Three guides are in full-time employment. KVTP has no licenses or permits to operate its tourism business and is not aware of legal requirements. However, KVTP is keen to become a legal operation to reduce interference from the Local Council, other villages and the Chief. Jealousy is a significant problem, some locals have threatened to go to the Chief and have the tourism project closed down or moved to their village (KVTP Pers. Comm.).

KVTP would like to reduce its dependence on RPS and have its own communication infrastructure (e.g. radio, internet, email) for bookings and promotional activities. Internet could also be used as an educational tool by the school.

10. – 12. Kwale, Katoyana and Lyangu Campsites

Three new campsites were built by African Parks Conservation (AP) in Liuwa Plains National Park in Western Province in 2005. The campsites were given to local communities to manage (with support from AP) and earn income from. Liuwa Plains is an exceptional protected area as 20,000 people live in the Park. Kwale Campsite is operated by the Mishulundu community, Katoyana Campsite by the Liuwa community and Lyangu Campsite by the Lumei-Salunda-Silanda community.

The campsites have been built the same. Each has a reed and concrete ablution block with running water, showers and flush toilets. The infrastructure design could be improved. Two camp guides manage each site. Traditional Lozi dances and music performances are advertised and requested. Village tours have begun and could be further developed. AP will eventually establish more campsites, in conjunction with the communities along the northern edge of the park. It is also assisting women's groups, including training by Mumwa Crafts Association in Mongu in handicraft

product development (traditional basketry). A high level of tourist satisfaction is evident from the visitors' books.

Almost all visitors are self-drive tourists. Most are from southern Africa (95%) and only a fraction is domestic tourists (5%). Visitor numbers are growing. The average length of stay in Liuwa is 4 nights. AP takes bookings for the campsites and allocates tourists to the campsites. Some return guests request particular campsites. Katoyana and Kwale are better managed (AP Pers. Comm.).

The campsites are open 6 months (July to December) a year. Currently there is no alternative accommodation option in the Park but there are plans for tourism companies to develop lodge facilities. AP has a policy to keep visitor numbers low in the Park and currently restricts the number of vehicles to five (approximately 10 tourists) per campsite at any one time. This will ultimately limit the income-generating potential of the campsites. There is little understanding of the concept of carrying capacity (ecological and tourist satisfaction) by campsite attendants and community leaders, however, and this may lead to discord in the future.

In the first year of operation, AP is paying the salaries of the campsite attendants. Technical advice in financial management was provided by an AP volunteer. In 2006, the communities will be expected to manage the campsites as businesses i.e. pay salaries, other overheads and maintain site infrastructure. The business plan calculates that 530 bed nights are needed to cover costs in each campsite (AP Pers. Comm.). Each community has a Committee in charge of campsite management and income generated. In Mishulundu and Liuwa communities, the Committee members were elected but in the Lumei-Salunda-Silanda community the members were apparently appointed by Chief Kaongolo (AP Pers. Comm.).

The gross revenue of Katoyana Campsite from July to early November 2005 totalled approximately US\$2,960 from 296 bed nights. Kwale for the same period generated approximately US\$1,950 from 195 bed nights. The revenue from US\$10 per tourist per night is shared: US\$2.50 goes to the village and US\$7.50 to a general community development fund. AP also gives the development fund US\$2,000 per month.

The potential annual gross revenue and net profit from bed nights of each campsite can be estimated based on 80% occupancy over 6 months. Revenue would total US\$14,400 and profit US\$9,100 per annum per campsite. Therefore the 3 campsites could generate up to US\$27,300 per year in net income for local communities.

Local leaders are supportive of AP and positive about the future as communities are seeing tangible benefits from tourism and are "remodelling their thinking" on wildlife as an asset to be conserved. There are still, however, wildlife and human conflicts in the villages, especially with hyenas and crocodiles. There is hope that income generation activities can be diversified although constraints are the distance between the campsites and villages, communication challenges, a lack of product development ideas and business skills (Chief Pers. Comm.).

13. Lochinvar Community Campsite

The campsite is located inside Lochinvar National Park and was developed by WWF in 1994. The appropriateness and design of the donor intervention is highly questionable and the site is barely operational. It is unclear why WWF funded infrastructure development for local communities inside the Park as technically the assets belong to ZAWA. Furthermore, the infrastructure was never completed, for example, sanitation facilities are incomplete, the 3 chalets were not finished and an unsightly concrete guesthouse was so poorly constructed it was never opened and is due for demolition. Overall, it is estimated that US\$20,000 was spent by WWF on the tourism component of the Wetlands Project. It is unclear whether WWF assisted with promoting the campsite. Training in tourism was promised but not provided (Choongo CRB Pers. Comm.).

The CBT project was for 5 CRBs who cover a very large area and high population and there appears to be little local sense of ownership of the project. Local people are more focused on cattle keeping and this livelihood brings them into conflict with the park. The campsite did at the beginning receive a reasonably high number of visitors, mainly self-drive tourists and expatriate residents. Locals used the incomplete chalets. Currently tourists often refuse to stay at the site as no campsite or chalet maintenance has been undertaken to date. The campsite received 133 tourists in 2004 - 88 foreign and 45 local visitors - which generated approximately US\$540 (ZAWA Pers. Comm.).

ZAWA collects and banks the revenue for the CRBs. Current revenue covers the cost of the campsite attendant (US\$32 per month). The community says that after WWF pulled out they lacked the capital, ideas and skills to make the campsite operational and would rather enter into a business partnership with a tourism company than see the camp closed (Choongo CRB Pers. Comm.). The campsite has very high tourism potential as Lochinvar is one of the few parks easily accessible from Lusaka. A meeting is due to be held between ZAWA and the CRBs to discuss the future of the campsite.

14. Mandiya Village

Mandiya Village is located on the Upper Zambezi, in Kazangula, about 40km from Livingstone. It is close to an upmarket lodge, Islands of Siankaba. A Dutch NGO registered in Zambia, the Source Connection Foundation (SCF) has been planning a CBT project with the community. The chief has allocated a piece of land for chalets. The community says it does not have the resources to build chalets so in the meantime it is using an existing house if visitors come. The project is not being marketed and has received no visitors. The nearby lodge is supportive of community development but was not consulted on the project. Lodge guests walk to another local village where the lodge supports the school. The viability of the Mandiya CBT project is questionable due to its location and the lack of involvement of nearby tourism operators. The village is difficult to find, the roads are poor and there is no public transport which would exclude the backpacker market.

15. Mukuni Development Trust (MDT)

MDT was established in 2003 and is based in Mukuni Village near Livingstone. It receives more revenue from tourism than other CBT institutions surveyed. Income is generated from the following:

- Mukuni Village Tour (US\$3 per tourist).
- Three curio markets in Mukuni Village, Mukuni Park and Victoria Falls.
- Rafting on the Zambezi - Ecolift (Z) Ltd. pays US\$1 per client.
- Helicopter companies (monthly payments of US\$200).
- Other tourism leases.

Most tourists (90%) for the village tour are international fly-in clients from large upmarket hotels such as Sun International (SI). SI clients are booked through the tour operator, Bush Tracks Ltd. Client satisfaction with the Mukuni tour is not monitored in the SI Guest Service Index. Few independent travellers visit due to a lack of public transport. No information was provided by MDT on the number of tourists who undertook the tour in 2004.

The tour starts at the Chief's palace, continues through the village and ends at the curio market. The product has been subject to criticism as some view it as over-commercialised and not authentic, in part due to the high number of tourists. In peak season, the village may be reaching its maximum carrying capacity in terms of tourist experience. There are also complaints that artisans in the curio market harass tourists for business and that the access road to the village should be improved.

No information is available on the income generation of artisans in the curio markets although substantial local wealth creation is being realised (Chief Mukuni Pers. Comm.). SI requested Chief Mukuni to form a women's curio group and gave the group a shop in the hotel. The retail outlet failed due to infighting so craft materials were given to the women in the village but the group has been inactive (SI Pers. Comm.).

MDT entered into a partnership with Ecolift (Z) Ltd. which has constructed a railway lift to take rafting clients out of the Batoka gorge on rapid 23. Ecolift commenced operations in 2005 and gives 10% of its gross revenue to MDT (US\$1 per client). The company estimates that the lift will generate US\$15,000 per year for the MDT and considers itself “the only true community based tourism venture in Livingstone”. Its investment was constrained, however, by “a lack of professional help for local governing bodies and slow government bureaucracy” (Ecolift Pers. Comm.). Company operations have also been constrained by the reluctance of rafting companies to pay US\$10 per client for the lift.

MDT generated US\$15,120 in gross revenue in 2004. Funds were spent on education, health, a hammer mill and football club. MDT estimates that US\$60,000 has been generated by tourism and spent on local development projects to date. There is unsubstantiated cynicism locally about MDT and whether income generated by tourism benefits the wider community as much as it should.

MDT is registered as a Society and has no tourism enterprise licence but it is interested in commencing tour operations. AWF has been developing the capacity of MDT and is providing technical advice for the development of a cultural village and future business partnerships for lodge construction modelled on a palace concept. MDT faces challenges with the high capital entry requirements (e.g. number of 4x4 vehicles) required for tour operations and investment (Chief Mukuni Pers. Comm.).

16. Muwele Cultural Village

Muwele Cultural Village was founded in 2001 and funded by WWF. It is located in Chikuni GMA near Bangweulu wetlands approximately 120km from the Great North Road. The WWF grant totalled ZMK80 million (US\$18,200) and the community contributed labour and local materials. The ‘Village’ offers local tours, walking safaris, canoe trips, self-catering accommodation and cultural entertainment. Facilities include 4 chalets, a camping area, pit latrines, showers, kitchen, a large paraffin fridge and solar power. It is open all year round. Muwele is registered as a Society and the Chief is the Patron. WWF provided business management and book keeping training but no specific tourism training (Muwele Pers. Comm.).

WWF did not assist with promotion. Muwele does not feature in guidebooks and despite a request, ZNTB have not yet visited but Muwele does feature in their list of ecotourism products. Most visitors hear of Muwele by word of mouth or via WWF and arrive abruptly. Muwele only received 6 visitors in 2003 and 13 visitors in 2004 (6 Zambian development workers and 7 American church members). It receives no self-drive tourists or hunters (who stay at Nsobe or Shoebill Camps). The only nearby commercial tourism operator, Kasanka Trust Ltd. (KTL), offered to help Muwele if the product is changed but no progress has been made to date. KTL considers Muwele unappealing for their clientele as it is an artificial cultural ‘village’ and the infrastructure is unsightly (KTL Pers. Comm.). Craft production ceased when tourist numbers did not materialise.

Muwele is highly unlikely to be commercially viable because it is in a marginal tourism area, product development is poor and it has no competitive advantage.

17. Nakapalayo Tourism Project (NTP)

Nakapalayo is a traditional Bisa village situated between Kasanka National Park and Bangweulu wetlands. Nakapalayo Tourism Project (NTP) was originally the idea of a Peace Corps Volunteer (PCV) and was set-up by the community in 2004. Facilities include 6 traditional chalets each with a pit latrine, 6 bathing shelters, a campsite, a traditional gathering shelter (*Insaka*), kitchen, office and store room. The quality of the facilities is very high although the chalets are on the edge (rather than within) the village. The facilities were constructed by the community in 6 months with small external financial assistance which, like Kawaza Village Tourism Project (KVTP), exhibits an unusually high degree of motivation, cooperation and resourcefulness.

NTP members (17) contributed ZMK15,000 each (total US\$58), labour and building materials (100 roof poles and 15,000 bricks) to start-up the project. NTP received a donation of US\$225 from Robin Pope Safaris. It also received loans from the NTP Director of US\$245 (repaid) and US\$614 from the PCV (of which US\$410 has been repaid) to purchase beds, mosquito nets, mattresses etc. A couple of other PCVs and a tourist made donations totalling about US\$130. More recently Kasanka Trust Ltd. (KTL) donated cement for a new signpost and a flush toilet set. NTP received training from the PCV who lived in the village, KVTP (through an exchange visit) and KTL (in-service placement in park lodges).

The visit by KVTP to Nakapalayo was considered invaluable as it *“emphasised how difficult the first few years would be – all the struggles with the chief, jealousy, members quitting because they were seeing no benefits, but that if they persevered they would be successful. He spoke of the importance of having a link to the tourism industry through a local safari operator to assist with marketing and possibly act as a technical advisor... I doubt the project would have gone ahead without his teaching and advice”* (Harris 2005, p.1).

NTP offers village tours, traditional food, cultural entertainment and handicrafts in addition to accommodation and camping. Marketing is a challenge. The PCV made brochures and NTP features in the 3rd edition of the Bradt tourist guide (McIntyre 2004). KTL and Mutinondo Wilderness Ltd. also promote NTP. Most of NTP's clients (75%) are from KTL and bookings are communicated through the local ZAWA radio.

NTP's greatest challenges are its location on a marginal tourism route and internal community disputes. It only received 31 visitors between August 2004 and August 2005 and has had approximately 25 bed nights to date. NTP caters for a wide range of market segments from international fly-in clients on mobile safaris (20%), self-drive tourists (20%), backpackers (10%), Zambian business travellers (20%) and NGO/government workers (20%). NTP faces local competition from Chipundu and Muwele.

NTP generated US\$1,364 in gross revenue in 2004. When NTP receives more tourists it plans to give 25% of net profit to developing a nursery school. NTP is a membership club, with 8 male and 19 female members. It has a Club Certificate from Mpika District Council. NTP would like to register as a Society and obtain a tourism licence to strengthen its legal status and prevent interference from the CRB and Chief. NTP is on communal land and has a letter of permission from Chief Chiundaponde. The Chief, however, temporarily closed NTP in 2005 due to misunderstandings regarding the relationship between KTL and NTP. The combination of jealousy and threats of witchcraft has had a seriously negative impact on the project and its leadership (Harris 2005).

Another internal challenge to enterprise of traditional culture is that, *“People of rural areas have a communal society and people depend heavily on each other. This seemingly good trait can be a huge problem for business. If a Zambian client (usually from WWF or other NGOs) arrives and explains they only have 20,000 kwacha instead of 60,000 kwacha resident rate, NTP fails to turn them away”* (Harris 2005, p. 4).

18. Natwange Community Campsite

Natwange Community Campsite is located in Mukungula GMA by Mano Gate to North Luangwa National Park (NLNP). It was initiated and constructed by North Luangwa Conservation Project (NLCP) at the cost of approximately US\$5,000. The community provided labour and NLCP provided a brick layer for one month. The campsite opened in 2002. NLCP trained camp attendants in book keeping but they left as business has been slow. The current 2 camp attendants are untrained but they do not view their skill level as inadequate.

Facilities include an office, ablution block, solar water pump, water tank and baboon proof dustbins. The campsite workers have added a traditional thatch shelter (*Insaka*) where they plan to sell crafts.

The community would also like to start entertainment performances and think (perhaps unrealistically) that more cultural attractions will bring more visitors. Campsite staff occasionally take visitors on a nature walk in the woodlands.

Bookings are taken via the NLCP and ZAWA radios. Mutinondo Wilderness Ltd. sends clients once a year and the campsite is mentioned in guidebooks. Information on where to camp in NLNP is given by ZAWA, NLCP and other tourism companies in Zambia who cater to self-drive clients (e.g. KTL). A few international mobile safari operators also use the campsite (e.g. Livingstone Tours from Germany).

The campsite is open for 7 months a year (May to November). The campsite received 68 tourists in 2004 which generated US\$340 in gross revenue, of which US\$118 was net profit and given to the CRB. What this CRB income was used for is not known and this appears to undermine the motivation of campsite staff.

The greatest challenge for Natwange is its remoteness on a marginal tourism route. The self-drive route across NLNP was only opened a few years ago.

"It's obviously little money for a large community. The biggest reason why we embarked on that was to at least let the community feel that they are part of tourism in North Luangwa. The Park has been closed for any day visitors until 2002. With the zoning of the park it has been decided that there should be some community camps and Mukungule was the first to really ask us for help. Community camps should have very little maintenance and that is why we have decided on a campsite only. They have a lot of ideas to open a traditional camp. The other big constraint is the little knowledge that they have on running a camp and the difficulty with marketing, advertising and bookings. If money and time allows we will change and help Natwange, but I do feel that it will probably be better to hand over to a private partner. Unless an outside organisation will help it will be impossible for a community camp in the middle of nowhere to survive" (NLCP Pers. Comm.).

19. Nsendamila Cultural Village

Nsendamila ('leaning tree') is located in Lower Lupande GMA by South Luangwa National Park (SLNP). The idea for the cultural village originated from the late Chief. The project was agreed to at a meeting between the Local Area Development Committee (now the CRB) and tourism companies in June 1997. Traditional huts, a summer hut (*Insaka*) and pit latrines were built. The 'Village' offered entertainment, storytelling and demonstrations of cultural activities such as daily chores (e.g. pounding), wood carving, blacksmiths and traditional healing. It employed 19 people on a part-time basis. Days and times of activities were agreed with lodges.

Tourism companies provided a loan of approximately US\$100 to help start-up the project in 1997 which was partly repaid. MS gave a grant of US\$100 in 1999 for infrastructure development and provided technical advice and promotional support (flyers) through volunteers. No formal training was given. The Area Development Committee invested about US\$225 into the project.

Most tourists (90%) learnt about the attraction from cooperating lodges and tour operators. The season was 5 months (June-October). Nsendamila was only operational for about 2 seasons (1998-9). It received about 200 visitors each season which would have generated approximately US\$1,000 of gross revenue per year (based on US\$5 per head).

The project was managed by an elected committee of 12 members under the Area Development Committee. There was a verbal agreement with the Chief to use the communal land and he received 1% of revenue as tribute. It is estimated that about half of the total net profit over 2 years (US\$800) was reinvested into the project and about US\$500 spent on other local development projects.

Nsendamila tried to partner with a nearby lodge in 1999 but the operation was failing and ceased to be operational in 2000. Various interpretations of why the cultural village collapsed have been given by different stakeholders:

- The Chief passed away and the new Chief put in new management which led to the demise of the operation (Former Committee Chairperson Pers. Comm.).
- Lack of management capacity (Former Committee Chairperson Pers. Comm.).
- The wider community were opposed to the presentation of private cultural ceremonies (e.g. initiation dances) as this was deemed inappropriate and culturally insensitive (Former Committee Chairperson Pers. Comm.).
- Communication problems existed as tourists would arrive when there was no scheduled activity and/or lodges would give notice for performances at the last hour (Former Committee Chairperson Pers. Comm.).
- Tourists had conflicting ideas on what they wanted (e.g. method of payment and/ or tipping) (Former Committee Chairperson Pers. Comm.).
- Jealousy and conflicts over tipping (Former Committee Chairperson Pers. Comm.).
- Tourism companies criticised the 'Village' as staged and not authentic (Former Committee Chairperson Pers. Comm.).
- MS advised Nsendamila not to develop the same product as Kawaza Village Tourism Project (KVTP) (Former Committee Chairperson Pers. Comm.).
- The project did not have a 'champion' like Robin Pope Safaris (RPS) who support KVTP (Former Committee Chairperson Pers. Comm.).
- Competition from KVTP 'killed' Nsendamila (Former Committee Chairperson Pers. Comm.).
- Mismanagement (KVTP Pers. Comm.).
- Advice from tourism companies was not heeded and the product was not what clients wanted (RPS Pers. Comm.).

Nsendamila had exceptionally high tourism potential yet it failed. It provides an interesting and valuable CBT case study and identifies a range of risks associated with cultural tourism development that need to be carefully considered and managed. SEKA is planning to revive a cultural centre in Nsendamila in association with the Luangwa Safari Association and the community.

20. Nsoke Community Safari Campground

Nsoke ('Sitatunga') Campground was established in 1994 and was assisted by the WWF Wetlands Programme. It is located in Chikuni GMA, approximately 130km from the Great North Road in Northern Province. It is close to Bangweulu wetlands and offers self-catering camping and accommodation in 5 traditional thatched chalets. Other facilities include a cooking and dining area, flush toilets and pit latrines, fencing and solar power. The camp is on communal land and managed by Chiundaponde CRB. Unusually for CBT enterprises it has a tourism enterprise licence.

Since the departure of WWF, Nsoke has faced marketing and communication challenges although it is known by word of mouth. It is open for 6 months (June to November) each year. The camp caters for hunters (70%), self-drive tourists (25%) and a few development workers (5%). Nsoke asserts it is in a "business crisis" and received 23 tourists in 2004 (Camp Supervisor Pers. Comm.). Although revenue and profit data was not available, this is estimated to have brought in gross revenue of US\$600. Nsoke complains that Shoebill Camp in Bangweulu wetlands which is managed by KTL is its key competitor, although Shoebill is an upmarket full catering tented camp.

It has been suggested that Nsoke is heavily subsidised by the CRB which is not a transparent community institution (KTL Pers. Comm.).

21. Nsongwe Village

Nsongwe Village is located in Nsyuungu Zone near Livingstone. Village tours were initiated by Chief Mukuni and two nearby local lodges, Songwe Point Village and Taita Falcon Lodge, in 1999. There is one village guide and a curio market. No toilet facilities are available. The lodges pay US\$3 per tourist for the village tour. The village received 351 tourists in 2004. Almost all were international fly-in tourists staying at the lodges, about 70% from Songwe and 25% from Taita Falcon. The tour generated US\$1,053 in gross revenue and US\$828 in net profit in 2004. No figures are available for the curio market. Tourists also make financial and material donations to local schools. The funds and donations are managed by the Local Board Committee that is under the Mukuni Development Trust (MDT). Profit is spent on the local school and clinic. Taita Falcon Lodge has suggested the community could develop an arena (*boma*) for cultural entertainment (Pers. Comm.). There is scope to improve the marketing of Nsongwe to other operators and set-up a booking system as currently tourists just turn-up and the guide often sits all day with no clients.

22. Shantunka Village

This village stay family project was set-up with advice and marketing support from ChaChaCha Backpackers Lodge in Lusaka. It is located 24km along the Great North Road. There is a traditional house for tourists to stay in and they are hosted by Florence. Tourists participate in daily activities such as cooking, digging and fetching water. Most tourists visit for one or two nights but there have been individuals who have stayed for weeks. ChaChaCha has new owners and it remains to be seen whether the village stay project will continue to be marketed.

23. – 24. Simonga Village Tourism Project and Visit Fund

Simonga Village is in Kazangula near Livingstone town and has 2 different CBT projects. The Tourism Project was established in 2005 by the head lady (*Inonge*) and a local guide. The Project offers overnight village stays in a local house, traditional food, cultural entertainment, visits to the traditional healer and school, a nature walk including local farms, and canoe (*makoro*) trips. Tourists are hosted by the head lady. The project is building 3 traditional mud and thatch houses for tourists and is planning an additional 5 chalets. Shade and signposts are also required.

Two backpacker lodges in Livingstone, Jolly Boys and Fawltly Towers, market the project. Jolly Boys helped design and print posters which have been put up in the lodges and internet café. ZNTB is also aware of the project. Most visitors are referred by Jolly Boys (85%). The average length of stay is one night. Overall, comments in the visitors' book were positive. There were suggestions to increase the level of participation in activities such as cooking and building.

Recently the Source Connection Foundation (SCF) has been giving technical advice through a Dutch volunteer and marketing support to the project. This has, however, caused disagreements with Jolly Boys as there are disagreements on product development and pricing. There may also be a potential issue between SCF and the project, as SCF is insisting that the project gives 15% of income generated to a community development fund.

Between March and September 2005, the project received 64 tourists which generated approximately US\$840. The revenue is used to employ guides, pay overheads (food etc.) and construct the traditional houses so the project is not yet in profit. The project is a CBO with a 15 member committee. The CBO has no tourism licence but is considering obtaining a certificate of incorporation.

The Village Visit Fund is a separate income generating activity. A nearby lodge, the River Club, approached the community in 2001 requesting that lodge guests could tour the village as Mukuni Village was too far away. A tour was developed that starts with an introduction to the head lady, followed by a walk through the village ending at the school. Driver guides from the lodge accompany the tourists. River Lodge requested no curios to be sold as clients want a 'real non-tourist village' (River Club Pers. Comm.).

River Club pays ZMK1,000 (45 US cents) per tourist for a one hour tour. This is much lower than other village tours made in the Livingstone area. River Club has offered to increase the price if the community takes the initiative to clean up the village, provide local guides and rebuild the traditional palace of Chief Sukuti but these have not happened (River Club Pers. Comm.). It is interesting to note that there is not a lack of tourism skills in the village as four upmarket local lodges employ staff from the community.

The fund is managed by the lodge and paid in lump sum payments. In 2004 River Club had 769 clients visit the village, an average of 64 per month. This generated ZMK 769,000 (US\$175) for the village fund. The village tour usually ranks third in popularity of activities after the Zambezi sunset cruise and Victoria Falls (River Club Pers. Comm.).

There have been security issues between Simonga Village and lodges in the past as armed robbers were based there. Hence various tourism companies contributed to a new police post. Nearby lodges also face issues from alcoholism, rubbish, begging, noise disturbances and jealousy in the village (Lodges Pers. Comm.).

River Clubs brings 75% of all tourists who tour the village. Other nearby lodges recently began to bring tourists - Sussi and Chuma (15%) and Tongabezi (10%). Payment arrangements are being finalised and the community is requesting US\$3 per tourist. A fourth nearby lodge, Natural Mystic, has also approached the village. The tourists are upmarket international fly-in clients.

The Village Visit Fund is managed by an elected committee of 10 people. The income is small but is spent on funerals, foodstuffs for the vulnerable, borehole maintenance and tribute to the Chief (Head Lady Pers. Comm.).

25. Tikondane Community Centre (TCC)

TCC is a registered CBO of 69 members established in 1999 near Katete in Eastern Province. The Centre is supported by an Australian church and has a volunteer expatriate director. The director had the original idea of developing tourism as an income generating activity to support community development projects.

The Centre offers township and village tours, trips to South Luangwa National Park (5 hours away), camping, guesthouse accommodation, a restaurant, cultural entertainment, handicrafts and visits to development projects such as the community school and adult education centre. It features in several guidebooks to Zambia (e.g. Lonely Planet) and has a website (www.tikondane.com) but receives visitors mainly through word of mouth and passing trade.

The Centre only received a handful of foreign tourists in 2004. Most clients were Zambian business travellers. TCC paid for a tourism enterprise license (not yet received) and has local licences to provide food and liquor. It has no insurance though. The Centre acknowledges that it needs to develop relationships with commercial tourism companies and increase marketing to attract more foreign tourists. It plans to build 3 VIP traditional chalets but is short of resources.

4.3.2 Key Issues

Idea to Start CBT

Over half of the identified CBT enterprises were initiated by NGOs, about a quarter by community leaders and members, and only a few with tourism companies (e.g. RPS, River Lodge, Jolly Boys). Most of the NGOs were conservation organizations. An outside 'champion'(s) playing an advisory role and catalyst for development is important in start-up but most effective when the champion is from the commercial tourism industry.

Community Participation

Deeming CBT 'community-based' and expounding the need for participation and motivation does much to hide local relations of power. Power conflicts exist between individuals, individual and collective rights, the community and outsiders. In several instances CBT has been undermined by internal community disputes. The CBT survey showed a range and combination of participation types from passive, bought, interactive and self-mobilization. The transparency and speed at which CBT projects develop can be crucial to motivational levels.

Organizational Structure and Legality

CBT features a range of organisational structures. The most prevalent is the Community Resource Board (CRB). Many simply comprise of an informal committee. Most are, however, registered with local and/or district council(s) as a CBO. A few are registered as a Society. It is notable that there are only 2 trusts which is a legal structure that can hold land title deeds and thereby own property. The breakdown of CBT organisational structures is as follows:

- CRB (8)
- Committee (7)
- Society (3)
- CBO membership association (3)
- Trust (2)
- Family (1)
- Local Board Committee (under MDT) (1)

Only 1 CBT enterprise has a certificate of incorporation (CCC) and none have a tax clearance certificate or liability insurance. Only 2 CBT enterprises (Nsobe and Tikondane) hold a ZNTB tourism license. CCC is in the process of obtaining a license. The minimum charge for a license is US\$450. This is prohibitively expensive for some CBT enterprises. Many small entrepreneurs (e.g. guesthouses and bicycle hire operators) in Livingstone have complained about the cost of the tourism license fee (ZNTB Livingstone Pers. Comm.).

Many CBT enterprises had been visited by ZNTB but not informed of the legal requirements for tourism operations. There is a general lack of awareness of legal organisational structures and requirements to undertake tourism business (e.g. licensing), partner with a tourism investor (e.g. investment certificate) and own assets (e.g. obtain title deed).

Many CBT enterprises expressed a strong desire to become legalized to form business partnerships and prevent interference from traditional leaders, CRBs and local councils, but they highlighted that they did not know the options, procedures and/or could not afford the necessary requirements.

Issues of CBT organizational structure and legalization have not been given adequate consideration by stakeholders. Donor investment has created assets such as lodges and campsites for CRBs that cannot be legally owned by the community institutions and are operating illegally.

Business Partnerships

Legal issues become acute when a community chooses to form a business partnership with a company. For example, CCC faced great challenges obtaining appropriate legal status to lease land and partner with an investor and the Mumbwa CRB could not obtain title deed for Kafumbwa Kwale and had to form a trust to own the land and lodge. The Mumbwa Trust, MDT, Lochinvar and Dudumwenzwe CRBs are all currently seeking business partnerships with tourism companies.

Market Research and Product Development

In most cases, no market research was undertaken to guide product development i.e. location, type and style of infrastructure, potential market segments and promotional strategies etc. This combined with a lack of business planning, resulted in the start-up of CBT enterprises that would not be

commercially viable. Product development should be highly dependent on the type of tourist(s) catered for. For example, self-drive tourists and overland trucks often prefer campsites to chalets, backpackers like village stays and international fly-in visitors undertake brief village tours due to time constraints. It is also important to note that all market segments have become more discerning and increasingly there is a preference for authentic non-touristy village experiences rather than artificial cultural villages.

The main products and services offered by CBT enterprises were as follows:

- Camping (16)
- Chalet accommodation (12)
- Village tour (7)
- Wildlife walk (7)
- Entertainment (7)
- Curio market (3)
- Guesthouse (1)

It is interesting that many CBT enterprises are based on tourist accommodation, although the 3 most successful initiatives – MDT, KVTP and Nsongwe generate most net income from day visits (see below). Not all community based curio markets were identified and data was not available to determine profitability.

Overall, 52% of CBT enterprises promote cultural products (e.g. village tour) and 48% are based on wildlife (e.g. camping in national park or GMA).

Pricing

Pricing of similar products and services varies between CBT enterprises. There have been disagreements between CBT enterprises, NGOs and tourism companies as to appropriate pricing structures and a tourist's willingness to pay. For example, a development NGO wants to increase accommodation prices for Simonga Village but a backpackers lodge in Livingstone argues this will out price the product and significantly reduce bed nights. A conservation NGO advocated for higher prices for the Bushcamp accommodation in the Luangwa valley yet a travel agent in Lusaka said it would make the product too expensive.

The pricing of village tours in the Livingstone area is particularly low and should be increased and made uniform. The most expensive village tour is sold by Kawaza village in Mfuwe.

Only 2 CBT enterprises offer different rates to tourism companies. These are KVTP and CCC which are well established and linked to the several tourism operators. KVTP has different prices for companies scaled according to the budget of the tourist, for example, it is more expensive for a RPS up-market client to undertake the village tour compared to the rate charged to backpacker lodges and overland trucks. CCC discounts the price of camping for company block bookings.

Business Constraints

Various constraints to enterprise development were identified by communities. These were as follows (ranked in order of number of times identified):

- Marketing (17)
- Communications (12)
- Skills (12)
- Finance (8)
- Seasonality (7)
- Accessibility/Distance (7)
- Ownership and governance issues e.g. interference by local elite, no land title (4)
- Competition (4)
- Low salaries and motivation (4)

- Conflict with tourism companies e.g. rafting and hunting operators (3)
- Over dependence on a NGO (2)
- High/over dependence on one tourism operator (2)
- Limit on bed nights (1)
- Communal nature of rural society (1)
- Lack of attractions (1)
- Overheads/ costs (1)

The main constraint is marketing as communities do not have the financial resources and/or skills to develop and effectively distribute promotional materials. This emphasizes the importance of CBT enterprises being linked to supporting tourism companies (e.g. nearby lodges, travel agents) who can market community products at zero cost to the communities.

Communication for bookings is a key constraint as many CBT enterprises are in remote areas. It is challenging for communities to manage unexpected arrivals (e.g. obtaining food for meals and notifying staff quickly). ZAWA and lodges can facilitate communication which is also important for tourist health and safety.

A lack of skills is also important particularly in tourism awareness, visitor handling, guiding and business development (e.g. financial management and book keeping). Many CBT employees have had no formal training.

Finance is perceived as a constraint, especially for upgrading accommodation infrastructure.

High seasonality in Zambia significantly limits income generation as the majority of CBT enterprises have a limited 5-6 month season as many areas are not accessible in the rainy season. During the tourist season CBT enterprises also face accessibility challenges as several are far from main tourism routes and/or located in areas with poor road infrastructure.

Ownership and governance issues can fetter CBT development. Issues included interference from Chiefs (e.g. closing the enterprise or demanding tribute), unaccountability for CBT income collected by community institutions, and the challenge for CRBs to own assets. It is the Consultant's view that this impediment to CBT would have rated much higher if the wider community had been consulted.

A couple of CBT enterprises in GMAs have land-use conflicts with safari hunting outfitters and MDT has disputes with rafting companies in Livingstone. Several CBT enterprises consider their business overly or highly dependent on a tourism company and/or NGO mainly for promotion.

The ranking of CBT constraints by communities differs from the prioritization of CBT constraints by tourism companies. The private sector survey ranked finance as the top constraint, followed by skills and marketing but communication challenges were not noted.

Income Generation

Data is insufficient to compare the income-generation in 2004 of all the CBT enterprises identified. This is mainly because almost a third of the enterprises had not commenced operations in 2004. The information was provided by CBT organizations, donors and tourism companies. Several CBT enterprises did not provide financial information. The gross revenue of MDT and CHICODA that manages CCC is likely to be much higher than indicated.

The data presented (see table overleaf) is only indicative due to the small sample (9 out of 25 enterprises) but it raises some useful points. CBT enterprises are ranked in order of estimated net income in 2004. MDT is ranked top as overheads are low and revenue high from village tours, curio markets and payments of tourism companies (e.g. Ecolift Ltd.). KVTP ranks second. It is notable that although Nsongwe Village received less than half of the number of tourists compared to Simonga

Village and employs a guide (unlike Simonga), its net income was almost five times higher. This is attributable to the difference in tour fees paid – US\$3 per tourist in Nsongwe and 45 US cents per head in Simonga.

The table demonstrates that relatively high external donor funding in infrastructure development does not necessarily result in net income generation. This is attributable to inappropriate top-down donor interventions not based on market-based principles and a lack of motivation and/or capacity in the communities concerned.

Table 5 Income Generation of Select CBT Enterprises in 2004

CBT Enterprise	Estimated Donor Infrastructure Investment to date (US\$)	Estimated Total Visitor Numbers 2004	Estimated Gross Revenue 2004 (US\$)	Estimated Net Income 2004 (US\$)
Mukuni Development Trust (MDT)	0	N/A	15,120	Not known
Kawaza Village Tourism Project (KVTP)	250	453	8,927	2,250
Nsongwe Village Visit Fund	0	351	1,053	828
Simonga Village Visit Fund	0	769	175	175
Natwange Community Campsite	5,000	68	340	118
Chiawa Community Campsite (CCC)	2,950	781	4,200	0
Lochinvar Community Campsite	20,000*	133	540	0
Muwele Cultural Village	18,200	13	260*	0
Dudumwenzwe Campsite	28,400	0	0	0

* = Estimate of consultant

Wider Community Income

Only 3 out of 25 CBT enterprises are generating enough net income per year for tangible development and social welfare in the wider community. These are MDT, KVTP and Nsongwe all of which are supported and promoted by tourism companies. The highest estimated net income for wider community benefit, however, is significantly less than the average annual salaries and philanthropic donations paid to local communities by individual tourism companies surveyed.

The new community campsites in Liuwa Plains supported by AP have high potential. CCC also has high potential but it is widely perceived that community benefits are not being realised due to poor management.

A key challenge relating to CRBs that manage CBT is that income from tourism goes into the general 'pot' not a separate fund allocated to a specific project, and therefore tangible benefits of tourism are less obvious to the wider community. Furthermore, if several CRBs are responsible for a CBT enterprise (e.g. Lochinvar) then the net gain and tangible benefit for each community becomes negligible due to the high overall population.

Negative Impacts of Tourism

The majority of CBT enterprises interviewed could not identify any negative economic, environmental, social and cultural impacts of tourism. This is most probably a reflection on how new many of the enterprises are as several negative impacts were identified. The most commonly cited problem was jealousy (3) followed by westernisation (2). Other impacts mentioned by individuals were environmental damage; conflicts with a hunting operator, a NGO (regarding control of loan funds), chief and within the wider community; the presentation of inappropriate cultural practices and begging.

Knowledge of other CBT Enterprise

Most enterprises could identify very few other CBT initiatives. The most well known were Mukuni and Kawaza Villages (6) as they are the most well established. This demonstrates that there is no informal network and CBT is highly fragmented.

Future Business Projections

Views on the future of tourism in general and CBT enterprise in particular varied from pessimistic due to a lack of management capacity in CRBs to highly optimistic. Several CBT enterprises highlighted a desire to partner with tourism companies.

"We have never done it (tourism). We were left with no ideas and are failing to operate the Campsite. We need a partnership not closure."

CRB

"It is (the CRB) a zero situation."

Community Campsite Worker

"We are in a business crisis."

Community Campground Manager

"Tourism has somehow lifted up the standard of living. If there be means of soliciting more tourists or help for the Community the people will appreciate it because many projects are on but because of less visitors we have to prioritize."

Local Board managing a Village Tour

"The future of the business is bright especially if marketing/advertising/promotion is intensified."

Community Campsite

"African Parks have provided a light at the end of the tunnel."

Community Leader

"The CRB has high expectations and is planning of build 2 more chalets."

Bushcamp Manager

"There is growth in tourism in general and in community based tourism. We expect tourist numbers to double in 2005 although we are aware of external threats to tourism in Zambia. When congestion becomes a problem with tourists, we will make a plan."

Village Tourism Project

"We have been gaining little. We need to enter into serious partnerships with investors in the future and have a bigger voice to advocate for easier government entry requirements into the industry."

Chief

"The future is bright as long as there is capacity building. We still have a long way before tour operators fully appreciate that local communities are an important factor in community tourism."

Trust Chairman

4.3.3 Success Factors and Risks

According to survey respondents and field research, there seems to be a correlation between commercial success of CBT enterprises and certain factors. Commercial success can be assessed by indicators such as cash profitability and investment return. Wider socio-economic benefits may encompass job creation and social dividend i.e. wider community income.

This assessment is qualitative but a combination of factors that show a strong positive correlation with success are:

- Market linkages to tourism companies
- Proximity to the tourism market
- Competitive advantage
- Financial management
- Visitor handling
- Community motivation

Factors that show a slight positive correlation with success are:

- Product quality
- Community investment

External investment (donor funding) has a very strong negative correlation with success and infrastructure basis has a modest negative correlation with success. This is a result of inappropriate donor interventions and does not necessarily mean that external assistance cannot be effective. Governance and transparency appears to have no correlation with commercial viability, although this maybe in the short term rather than the long term as CBT is in its infancy in Zambia.

4.3.4 Planned and Potential CBT

Several CBT ideas have been suggested and some are at the planning stage in different parts of Zambia. This list is not comprehensive and commercial feasibility not assessed but projects and ideas include:

- 1) A campsite in Siavonga by Lake Kariba that is under consideration by an Italian volunteer agency, CELIM, and the local community.
- 2) Mugulameno Cultural Village at Bwerenunka curve in the Lower Zambezi that is receiving technical advice from AWF.
- 3) A new cultural village development in Mukuni is also being advised by AWF.
- 4) Visits to chilli pepper out grower farmers in Livingstone is under consideration by the Elephant Pepper Development Trust.
- 5) A Mumbwa Communities Tourism Circuit has been proposed by the Kiyandu Community Cooperative Trust.
- 6) Shiwa Safaris is planning to develop a community game ranch (5,500 ha) with community camps.
- 7) Mutinondo Wilderness Ltd. and WWF are assisting Mpumba Natural Resources Conservation Society (MNRCS) to build a rest house in Salamo Village. MNRCS has applied for title of 5,000 ha of land.

- 8) West Lunga Trust wants to set-up adventure canoe safaris on the West Lunga and Kabompo rivers.
- 9) Taita Falcon Lodge suggested the community could benefit more if a small cultural arena (boma) for traditional dances was set-up in Nsongwe village.
- 10) Kasanka Trust Ltd. considers a community interpretation centre at the Livingstone Memorial and community management of Waka Waka Camp possible.
- 11) Robin Pope Safaris would like to replicate Kawaza Village Tourism Project along self-drive routes to waterfalls but lacks the time and resources to commit to such a project.
- 12) Sensitisation and Education for Kunda Arts is establishing a cultural centre at Nsendamila.
- 13) Development of cultural villages based on traditional festivals is being considered by the USAID MATEP Programme.

4.4 Private Sector Survey on CBT and Support Roles

Survey Respondents

Twenty-nine tourism companies completed the private sector questionnaire survey.

Type of Operation	Location(s)
Travel agent and tour operator	Lusaka
Low spend lodge and camping	Lower Lupande GMA, South Luangwa National Park
Upmarket park lodge	Lower Zambezi National Park
Upmarket lodge	Kazangula, Livingstone
Low spend tented camp and camping	Upper Zambezi, Kazangula, Livingstone
Low spend lodge and camping	Livingstone
Upmarket lodge and tour operator	Lower Lupande GMA, South Luangwa National Park
Upmarket park lodge, campsites and tented camp	Serenje and Bangweulu
Upmarket lodge	Chiawa GMA, Lower Zambezi
Low spend lodge	Mpika, Northern Province
Game ranch	Mwinilunga, North Western
Hunting safari outfitters	North Western
Upmarket lodge and bushcamps	North and South Luangwa
Upmarket lodge, bushcamps and tour operations	South Luangwa National Park
Upmarket lodge	Chiawa GMA, Lower Zambezi
Upmarket lodge	Lower Zambezi National Park
Historical house	Northern Province
Middle market lodge and tour operations	Kapishya Springs and North Luangwa National Park
Upmarket bushcamps and tour operations	South Luangwa National Park
Upmarket traditional style lodge	Kazangula, Livingstone
5 star Hotel	Livingstone
Hunting safari outfitter	Mumbwa GMA
Middle market lodge	Livingstone
Middle market and low spend lodges	Lake Kariba
Travel agent and tour operator	Lusaka
Lodge and tour operations	Kasama, Northern Province
Upmarket lodge	Livingstone
Low spend lodge and camping	Lower Lupande GMA, South Luangwa National Park
Travel agent and tour operator	Lusaka

Location of Survey Respondents

Several businesses operate in more than one Province but for the purposes of simplification, their location is listed as the Province that is the main base of operation. Most respondents were from Southern Province that includes the tourist 'capital', Livingstone. Despite requests, no completed surveys were received from tourism companies in the Copperbelt and Western Province. The survey did manage, however, to solicit responses from 6 out of 9 Provinces overall.

Location by Province	No. of Respondents
Southern	8
Lusaka	7
Eastern	6
Northern	4
Central	2
North Western	2
Copperbelt	0
Luapula	0
Western	0
TOTAL	29

Market Segments Catered to by Survey Respondents

Operators surveyed cater to all tourist types. The two market segments respondents mentioned most frequently were international fly-in tourists and ex-pat residents.

Market Segment	No. of Respondents	Percentage of Sample
International fly-in tourists	22	76
Ex-Pat residents	22	76
Business visitors	19	66
Zambians	18	62
Self – drive tourists	17	59
Educational visits	10	34
Backpackers	09	31
Volunteers/ Development workers	09	31
Overland trucks	08	28
Visiting friends and relatives	08	28
Hunters	07	24

Interest in and Range of Community Based and Cultural Tourism Activities Promoted

On average approximately 44 % of clients are interested in community/ cultural activities. Survey respondents market a range of community/ cultural activities. Over half offer village tours although in many instances this is not a CBT enterprise. Visitors tour the village without payment but often make donations to the local school. Crafts are often promoted and visits to local schools are also popular.

Tourism Activity	No. of Respondents	Percentage of Sample
Village tours	16	55
Crafts	07	24
Visit to local schools	06	21
Cultural dances	05	17
Traditional ceremonies	02	07
Overnight village stays	02	07
Local attractions	02	07
Homestead stays	01	04
Farm tours	01	04
Local development projects	01	04
Local life activities	01	04
Visit to the Chief	01	04
Museum	01	04
Local produce (e.g. honey)	01	04

Only 2 tourism companies market traditional ceremonies, such as the Lwindi rain making ceremony that is held near Livingstone. Five companies commented that they could not include CBT activities in their product because of a lack of tourist infrastructure (2 operators) or their location did not make it viable (3 operators). This particularly applies to operators located deep within national parks such as Luangwa and Lower Zambezi where most clients fly-in.

Help Provided by Survey Respondents to CBT Activities

Technical assistance to tourism activities in the community had been given by 8 companies (28%). This included:

- Technical advice to develop a village stay (3 operators)
- Marketing (3)
- Start up of a village walk (3) - not CBT
- Donations to a cultural village e.g. flush toilet set and cement (2)
- Start up of a curio market (2)
- Start up of village tours where clients pay (2)
- Organisation of school groups (e.g. World Challenge) with projects (1)
- 3 weeks In-service training for 6 community Bushcamp staff (1)

Interestingly, Kafunta River Lodge provided complimentary in-house training for community members from the 3 Community Bushcamps in Luangwa at the request of WCS. The most well known and highly successful example of operator support to CBT is Robin Pope Safaris' initiation, technical advice and ongoing marketing support to Kawaza Village Tourism Project (KVTP) in Mfuwe.

Community Support Roles in Tourism

Local communities supply a range of goods and services to companies surveyed. The most commonly mentioned were food, crafts, building materials and labour. Companies are significant employers in rural areas where job opportunities are limited.

Goods and/or Service	No. of Respondents	Percentage of Sample
Food products	17	59
Crafts	15	52
Construction materials and labour	11	38
Entertainment	06	21
Outsourced staff meals	01	03
Charcoal	01	03
Information on wildlife (Bangweulu)	01	03

Market linkages between communities and individual companies can be significant. For example, Jungle Junction, Bovu Island which is a small operation pays out approximately US\$20,000 in wages and US\$5,000 for building materials (reeds) a year to its local village. Jungle Junction has such a good relationship with the neighboring village that there are no locks in the camp on the island.

High Potential Opportunities for Communities to Benefit More from Tourism

Companies identified a range of high potential opportunities in which communities could benefit more directly and indirectly from tourism.

High Potential Opportunity	No. of Respondents	Percentage of Sample
Crafts and curios	11	38
Food supply	08	28
Visits to and sponsorship of school projects	05	17
Village visits/ cultural village	04	14
Employment	04	14
Cultural exchange	03	10
Construction of community camps/campsites	02	07
Cultural entertainment	02	07
Community Game ranch	01	03
Community campsite improved	01	03
Fishing safaris	01	03
Building and technical skills e.g. carpentry	01	03
Better marketing & availability of quality CBT products	01	03
Demonstration of traditional hunting trapping and general way of life	01	03
Cultural Arena (boma) for dances	01	03
Interpretation Centre at Livingstone Memorial	01	03

The two most frequently mentioned opportunities were the supply of crafts (38%) and food products (28%). Lodge owners in South Luangwa National Park commented:

“There is definitely room for more and better crafts to be produced in the local Mfuwe area – the craft production is quite minimal (outside the big managed projects). If we want anything for our craft shops we buy most of it in either Lusaka markets or from Malawi”.

“More coordinated vegetable growing is needed. There is a vast amount coming in from Lusaka weekly that could be grown locally but the supply does need to be coordinated and reliable”.

There were several notable CBT opportunities specified. Shiwa Safaris is planning to develop a community game ranch (5,500 ha) with community camps. Mutinondo Wilderness Ltd. is assisting Mpumba Natural Resources Conservation Society (MNRCS) to build a rest house in Salamo Village.

MNRCS has applied for title of 5,000 ha of land. Taita Falcon Lodge suggested the community could benefit more if a small cultural arena (boma) for traditional dances was set-up in Nsongwe village. Kasanka Trust Ltd. considers a community interpretation centre at the Livingstone Memorial and community management of Waka Waka Camp possible. An operator commented that Chiawa Community Campsite could be more profitable if it was better run. Robin Pope Safaris would like to replicate Kawaza Village Tourism Project (KVTP) in other parts but lacks the time and resources to commit to such a project. One cultural tour operator in Northern Province emphasized that:

“There are a lot of opportunities for the communities to benefit from tourism in the North, as long as more operators involve them. We must involve the communities as much as possible, they benefit, but we benefit more! For example, rather than driving past a village on the way to see a waterfall, we stop at the village, have lunch (food provided by us but prepared by the head mans wife), visit the village and go to the waterfall. That way they benefit from the tourists rather than just see the dust.”

Constraints on Community Based Tourism Development

Companies identified a wide range of constraints on CBT development. The most frequently mentioned constraint was a lack of finance (34%). Another key constraint is a lack of skills and capacity in business and a lack of understanding of tourism (28%). A lack of promotion was also considered a key challenge (14%).

Constraint on CBT	No. of Respondents	Percentage of Sample
Lack of financial support	10	34
Lack of skills/ capacity to understand commercial enterprise /tourism	08	28
Lack of exposure and marketing	04	14
Lack of creativity, motivation and initiative	04	14
Lack of management	03	10
Lack of time in tourist schedule	03	10
Operators lack time to support initiatives	03	10
Jealousies	02	07
Lack of accountability/ transparency	02	07
Low Product quality	02	07
Lack of regulation and control	02	07
Alcoholism	02	07
Remoteness	01	03
Lack of coordination and joint development and promotion of CBT	01	03
CRB structure not clearly defined, monitored or managed well	01	03
Lack of raw materials for crafts	01	03
Lack of community cohesion and ability to work together	01	03
Short-termism	01	03
Greed	01	03
Lack of discipline	01	03
Not possible inside National Park	01	03
Lack of understanding and misplaced expectations of tourists	01	03
Litter in villages	01	03
Lack of sensitisation of tourism benefits	01	03
ZAWA declared no new development in direct Mfuwe area	01	03
Lack of educated, responsible leadership	01	03
Bureaucracy and licensing	01	03
Low productivity (low health and education levels)	01	03
Not appropriate in a hunting area	01	03

Several companies elaborated on identified constraints. A significant issue is the construction of community tourism camps close to where hunting companies operate. This is an emerging source of conflict between CRBs and hunting lease holders in Mumbwa and Chifunda GMAs and is caused by poor consultation and lack of effective land use planning. Other identified challenges which undermine community tourism development included poor product quality, a lack of transparency in communities, lack of coordination, misplaced perceptions and increasing litter which makes villages unattractive to tourists.

“Capacity building within CRBs is needed that would enable them to undertake commercial enterprises in partnership with incumbent safari hunting lease holders.” Safari Hunting Outfitter

“Licensing is not as important as transparency in community tourism. A lack of accountability undermines the support and marketing tourism companies want to provide.” Lodge

“The current Community Campsite is under utilised and seemingly poorly managed – this could be a profitable and high profile venture for the community, but it isn’t. Community tourism needs to be more attractive to visitors – cultural ceremonies and tourism services need to be better managed, marketed and delivered with the needs of tourists catered for”. Park Lodge

“It’s hazardous to the photographic tourist moving in an area where hunting is taking place. Staff employed by tourist lodges, tend to walk collecting honey or wood in the hunting area, thereby placing themselves in danger. This is especially true of Kafumba Kwale Community Camp staff. Access to this camp is a big problem as the road goes through prime hunting area, and this makes it inevitable for tourists and hunters to become at odds.” Safari Hunting Outfitter

“The community does not always understand that someone who runs a tourism camp does know how the tourist wants to interact with the community. One community initiative (Nsendamila) failed as the community would not listen to advice about how to set it up and in the end it was done in a way which did not appeal or attract tourism.” Park Lodge

“Mukuni is a township not a village, it is urbanized and not traditional. It is also too touristy. Tourists are discerning and want an authentic cultural experience.” Lodge

“The expectations of the community (leaders and individual) are too high and this causes poor relations between the community and tourism operators.” Lodge

“Litter and alcohol abuse is now a problem in the GMA as disposable income increases.” Lodge

“I feel that with just (many) little individual community projects, the projects will have to face too many difficulties by themselves and will have trouble to survive. There should be like a central website, a central database, a central booking office, which should maintain regular contact with the projects in the field, specific (self-drive) packages for community tourism projects, more attention to cultural events in the communities, a trainings centre or workshops in the field for staff and management..... a lot can be done and a lot needs to be done to give these community projects a fair chance to be self sustainable one day.” Travel Agent

External Support for CBT Suggested by Survey Respondents

Various suggestions were made regarding forms of external support that would be useful for commercial tourism operators to better support community tourism. The most frequently mentioned were financial support, training for communities, help with product development and marketing. Suggestions included:

- Financial support
- Education and training

- Product development and marketing
- Time and technical advice
- Infrastructure (better roads)
- Radio programmes to sensitise communities about tourism
- Raising awareness in local communities about the benefits of tourism
- CRB capacity building.
- Improve marketing, management and service delivery of CBT
- Consultation from the start to provide free technical and market advice

“Finance for education rather than building. With the right knowledge people can do a lot of things for themselves by themselves.” Travel Agent

Several companies complained that they were never consulted when nearby community tourism activities were set-up by NGOs. They failed to comprehend why this was when their clients were the potential market (Pers. Comm.). Many are very willing to give free technical and market advice but various donor funded implementing agencies do not take advantage of this.

Legal Requirements for CBT Enterprises

A question added later on in the survey (i.e. it was not asked of all respondents) addressed what certificates, licences and permits a commercial operator would require a community tourism enterprise to have in order to do business with them. The majority of operators stated that a community tourism enterprise would need “to have its house in order”. Legal requirements identified were as follows:

Type of Legal Requirement	No. of Respondents
All legal requirements	09
Tax Clearance Certificate	04
Insurance (liability cover)	03
Tourism Enterprise Licence (ZNTB)	03
Certificate of Incorporation	01
Tax Payers Identification Number	01
None	02

Several interesting explanatory comments were made by companies regarding the rationale for legalising CBT. These related to business partnerships, improving standards and the letter of the law.

“A community tourism enterprise would have to have all statutory licenses in place to be seen as legal and responsible partners in any joint enterprise”. Safari Hunting Outfitter

Community tourism activities are not regulated by ZNTB meaning often below par service. They require all certificates, licences and permits otherwise standards are likely to be low”. Park Lodge

“A community tourism enterprise is also just a tourism enterprise and should meet the same conditions as the other operators do. Unless otherwise would be arranged by law for the community projects.”
Travel Agent

A couple of companies did not see the need for legal paperwork. This was either because it has so far not been a problem or as the CBT activity was small-scale (e.g. village tour). The goods and services provided by CBT enterprises, their location and level of infrastructure vary greatly and influence how legal requirements are viewed. For example, it is more imperative to address standards and safety issues for community-owned camps in GMAs with abundant dangerous wild animals than it is for a village tour led by one community guide that has no infrastructure.

Other Community Development Projects supported by Survey Respondents

In addition to support provided to CBT, companies donate substantial sums to uplift their local communities. Projects supported included:

- Fish farming, bee keeping and agricultural schemes
- Women clubs
- Conservation Lower Zambezi
- Schools (infrastructure, teachers salaries, materials e.g. books, stationery)
- Educational scholarships
- Clinics and health centres (infrastructure and medicines)
- Old people's home, adult literacy
- Orphanage
- Boreholes and other sanitation infrastructure (e.g. pump, tower and tank)
- Electrification of Songwe Village
- Crafts

Many companies support local schools and take guests to visit. This can generate thousands of dollars in donations. For example, one recent safari trip in northern Zambia resulted in US\$2,100 being donated directly to village development projects.

Income generated from tourism provided to local development projects ranged from less than US\$50,000 to amounts exceeding US\$250,000 per year. Sums of less than US\$50,000 were most common. Sun International has the largest annual corporate social responsibility budget. Households benefiting from development projects ranged from between less than 50 to over 300.

Negative Impacts of Tourism

Various negative economic, socio-cultural and environmental impacts were attributed directly or indirectly to tourism development. Respondents listed the following:

- Conflict and poor relations between communities and the private sector due to unfulfilled community expectations and as agreements between companies and community are vague and not enforced.
- In-migration due to work opportunities leading to human wildlife conflicts, more pressure on natural resources (including poaching) and breakdown of traditional cultural values.
- More prevalent litter and alcohol abuse as disposable incomes increase.
- Social harassment (street vendors following tourists).
- Higher petty theft and crime.
- Prostitution.

The most commonly mentioned impacts were the problems created by in-migration into the Mfuwe area and litter and alcoholism in the Lower Zambezi and Livingstone areas. For example:

"Village and school trips would do well, but tourists are reluctant to spend/donate money if the areas they visit are neglected and untidy due to littering. Litter in villages creates a bad impression on the guests". Lodge

Tourism in less developed areas such as northern Zambia has not impacted negatively yet.

Views on the Future of Tourism in Zambia

All survey respondents (except a hunting company) were positive about the future of their tourism business and tourism in general (including CBT). This optimism was tempered, however, by concerns about over-regulation, mismanagement, a lack of planning, and degradation of the resource base.

“Zambian tourism is increasing in general and the market is moving towards community and eco-based tourism at an ever increasing rate. I foresee this increase to continue over the coming years creating even more possibilities for linking up established tourism operators and local community projects. In the last 12 months we have become increasingly involved, both through marketing and support (logistical and financial) and I expect this trend to continue”. Backpackers Lodge

“Tourism in Zambia has been growing steadily and more recently the pace has speeded up. I think it is essential that growth is managed and we learn from the mistakes of other African countries that have, in the end, lost the special asset they have due to over development. It is important to spread the development into more remote areas in the country and even with a park. For example, Bangweulu swamps is an amazing destination but has not been developed to its potential. We as a business are now really focusing on spreading our occupancy levels throughout the year. Zambia has a successful peak season and a very low green occupancy season and we are focusing on developing the green season rather than just adding more beds to the peak season.

Kawaza village has been a huge success and if I had the time, I would love to use this model to develop such villages around Zambia. It would need to be carefully done so that self drive routes are developed as well as fly in tourists being able to easily visit these villages. It is also important that each village has the marketing support of a strategic tourism partner. I feel that this could be done in a way that would develop a model that could be taken world wide for community tourism. And I believe Zambia would be a good place to develop this model.” Park Lodge

“Potential for development is good but proper structures must be in place to manage the industry (manage means manage, not dictate), better protect protected areas (from poaching and development) and relationships between the community, operators, conservation agencies and GRZ need clearer objectives, boundaries, limits and better enforcement. Uncontrolled development is more dangerous than no development. Community based tourism is a good idea but without regulations and enforced minimum standards, Zambia is at risk of losing what it has gained. Expectations have to be realistic and the resource has to be protected regardless of the aspirations of tourism development. More effective, enforceable regulations designed to protect the natural resources and the tourists are needed if Zambia is to gain from the increased tourism interest in the country.” Park Lodge

“It is important that the people in the area realise that tourism can be lucrative but it is also an extremely sensitive business therefore they must also play a part in protecting resources and reduce any criminal elements and littering.” Lodge

“It is a difficult market, not easy to establish yourself, but we feel confident about the future especially by combining our forces with other operators.” Travel Agent

“Government should reduce on red tape... it's like you have a drivers licence but you also need a licence to sit in the drivers seat!” Lodge

“The future of the safari hunting industry in Zambia is bleak. This can be directly attributed to the total lack of capacity and commitment by ZAWA to resource protection in protected areas. The level of poaching is increasing alarmingly with many prime hunting blocks depleted to the level of no longer being viable as commercial enterprises. In addition to this, ZAWA have permitted many unscrupulous foreign hunters and outfitters into the country who are not monitored in any way at all and are here for the money only. I would like to emphasize that ZAWA has failed totally in its mandate to protect Zambia's wildlife estate and their constant efforts to squeeze more money from any and every tourist enterprise that they are involved in makes investment in tourism a very unattractive position.”

Safari Hunting Outfitter

4.5 SWOT Analysis of CBT in Zambia

The table highlights the key strengths, weaknesses, opportunities, and threats of CBT in Zambia.

<p style="text-align: center;">STRENGTHS</p> <ul style="list-style-type: none"> ▪ Existing Community Structures <ul style="list-style-type: none"> - CRBs, VAGs, Societies, Committees - emergence of Trust models with land titles ▪ Established and Embryonic CBT <ul style="list-style-type: none"> - models of good practice (e.g. KVTP) - experienced resource persons - young enterprises to upgrade ▪ Industry and Consumer Interest <ul style="list-style-type: none"> - high commercial interest - wider community benefit and add-on products - village life, ecotourism, arts and crafts ▪ Other Funding Agency Interest <ul style="list-style-type: none"> - SNV, JICA, DANIDA, WTO, UNDP and others ▪ Government Interest <ul style="list-style-type: none"> - supports PRSP and tourism policy 	<p style="text-align: center;">WEAKNESSES</p> <ul style="list-style-type: none"> ▪ Organisational Issues <ul style="list-style-type: none"> - risk of interference(s) from elite - poor financial management - weak legal status of CBOs - limited wider community participation ▪ Poor Information, Coordination, Dissemination and Planning <ul style="list-style-type: none"> - for communities and stakeholders - local and regional lessons not learnt - information deficit on tourism sector - planning and interventions on insufficient data ▪ Lack of Practical Private Sector Orientation <ul style="list-style-type: none"> - inappropriate & unmanageable community roles - many products donor driven not market-led - multiple and sometimes conflicting objectives - weak linkages to commercial companies - poor product quality and guest safety standards ▪ Less Developed than Regional Competition ▪ Lack of Resources <ul style="list-style-type: none"> - communities lack capital ▪ Lack of Capacity <ul style="list-style-type: none"> - communities lack business skills - lack of stakeholder understanding of tourism - poor project planning and management ▪ Poor Infrastructure <ul style="list-style-type: none"> - Roads, water, sanitation - Communications
<p style="text-align: center;">OPPORTUNITIES</p> <ul style="list-style-type: none"> ▪ Tourism Growth and Increasing Demand <ul style="list-style-type: none"> - more recognition as a key economic sector - ecotourism fastest growing niche product ▪ Tourism Diversification <ul style="list-style-type: none"> - new product development and marketing - catalyst for multiplying and spreading benefits to other sectors and marginal tourism areas ▪ Community Enterprise Development <ul style="list-style-type: none"> - supply of goods and services - partnerships (e.g. JV) - alternative incomes, job creation, skills - better linkages to tourism industry - infrastructure development ▪ Enhancing Natural and Cultural Heritage <ul style="list-style-type: none"> - incentives for wildlife and habitat conservation - presentation of and pride in cultural traditions ▪ Creation of a More Enabling Framework <ul style="list-style-type: none"> - dissemination of best practice - more informed decision-making - better policy and legal framework - legalisation and licensing 	<p style="text-align: center;">THREATS</p> <ul style="list-style-type: none"> ▪ Poor Coordination and Communication <ul style="list-style-type: none"> - highly fragmented industry - discord between stakeholders - weak institutional development ▪ Lack of Performance <ul style="list-style-type: none"> - regional CBT demonstrates risks - inadequate technical advice - no monitoring and evaluation - failure to meet responsible tourism standards - limited individual and community income - disillusioned communities ▪ Barriers to Success <ul style="list-style-type: none"> - poor legal framework - maze of regulations, licences and fees - risks, insurance, tourist safety - capital and operational financing ▪ Degradation of Asset Base <ul style="list-style-type: none"> - Poaching, deforestation, over-fishing - Immigration, loss of cultural traditions ▪ Changes in Tourism Demand <ul style="list-style-type: none"> - insecurity, regional competition, fickle demand

5. Key Regional Lessons Learnt

5.1 Challenges in Creating a Rural CBT Product

A review of projects to develop tourism in poor rural areas to disperse benefits and reduce poverty in Uganda and the Czech Republic identified several key issues that are highly relevant to and mirrored in the Zambia CBT context. Challenges can be summarized as follows:

- Ensuring sufficient quality of rural tourism services is difficult and requires substantial investment in training due to a lack of skills at the community level.
- Marketing emerges as a major challenge to rural tourism entrepreneurs.
- Practical, logistical and implementation challenges, in part due to low development levels, imply that building rural tourism is a long-term and slow process and needs to be planned and resourced as such.
- Building community institutions at the community level to unite entrepreneurs or manage collective assets needs to be assessed and may require substantial investment.
- Building institutional networks and collaboration and policy support is very important due to the following considerations:
 - Replication depends on uptake of the concept.
 - Time-bound fixed resourced projects appear too limited for the rural development process, making it all the more important that an ongoing process to support rural tourism is built in other institutions.
 - Cases show marked success in building institutional collaboration although examples elsewhere in Africa indicate how the lack of collaboration can block rural tourism.
- Dependency of rural tourism on national tourism developments. Limited international tourist volumes can have substantial knock on effects on small producers. For example, one year without enough tourists may mean the collapse of the tourism micro enterprise. The linkage between the new rural product and existing products, whether it is an add-on for the same market or a new offering for a new market, needs to be identified as part of the development strategy.

Source: Holland, Burian and Dixey 2003

5.2 Replicability and Relevance of CBT Trade Associations

There are two regional well established examples of CBT producer associations relevant to Zambia. The Namibia Community Based Tourism Association (NACOBTA) and the Uganda Community Tourism Association (UCOTA). NACOBTA was established in 1995 and has approximately 45 members. UCOTA was formed in 1998 and has about 50 members. Both Associations were founded by community representatives with NGO/donor help. Members include accommodation and food providers, guides, handicraft groups (about 50% of members in Uganda), cultural groups (including entertainment), traditional villages, wildlife councils (Namibia) and local museums.

On the micro level both Associations promote pro-poor tourism development through the provision of workshop and on-site advice to members. On the macro level the Associations lobby Government to promote policies conducive to CBT development. There is demand for such Associations in Namibia and Uganda from both levels – from Government, national Tourist Boards, the private sector, donors and communities themselves. However, there is a need for political and institutional support, political stability, corporate and communication expertise and sustainable funding for the Associations to operate effectively (Williams, White and Spenceley 2001).

Many of the problems in enterprise and community development and tourism faced by NACOBTA and UCOTA exist in Zambia. The majority of people involved in managing and operating CBT are rural poor with limited skills, social standing and education. In Zambia several NGOs provide support to CBT and generally rely on donor funds. The distinctive feature of the NACOBTA and UCOTA model is that it represents members from community enterprises. There are several advantages to this,

particularly when engaging with policy makers and the private sector. A 'membership-based organisation' cannot be created by outsiders, but as demonstrated in Namibia and Uganda it can be facilitated by them. However, it is crucial to note that any attempt to replicate this model would have to incorporate business and legal expertise, as well as a business plan for the financial sustainability of the association (Williams, White and Spenceley 2001).

CBT is in its infancy in Zambia compared to Namibia and Uganda. There are fewer operational CBT enterprises (20+ although this figure excludes craft groups) and many are very new. The provision of member specific long term skills transfer in Namibia and Uganda is expensive in terms of staff time, expertise and travel (Williams, White and Spenceley 2001). This is a highly relevant constraint in Zambia where distances are large, transport infrastructure poor and many areas inaccessible in the wet season.

A newer regional CBT trade association facilitated by SNV and the Tanzania Tourist Board, the Tanzanian Cultural Tourism Organization (TACTO), has not been very successful due to internal conflicts between its membership and leadership (SNV Tanzania Pers. Comm.).

5.3 Joint Ventures

Joint Ventures (JVs) between communities and private tourism investors are an emerging trend in Southern Africa. In each country they take different forms. The term 'Joint Venture' is not used in the strict legal sense used in commerce, when two companies form a joint venture. Community-private sector JVs can be defined as a contractual partnership between a community or local institution and a private sector investor, to work together in establishing and operating a single tourism or hunting enterprise (Ashley and Jones 2001). A few JVs are emerging in Zambia. For example, between Ecolift (Z) Ltd. and the Mukuni Development Trust (MDT) in Livingstone and several private sector operators plus an investor have signed agreements with Chiawa Community Campsite (CCC) in the Lower Zambezi. JVs to date in Zambia have developed in an ad hoc way driven by private tourism investors. In Zimbabwe, Botswana and Namibia, JVs have been developed within the context of national CBNRM programmes.

The Communal Areas Management Programme for Indigenous Resources (CAMPFIRE) in Zimbabwe has promoted JVs particularly in the safari hunting sector. Botswana has developed guidelines for the establishment of JVs that provide a formal role by various government agencies in advising and assisting the communities in negotiating with the private sector and evaluating tender bids. Namibia has the strongest legislation in the region that devolves authority over wildlife and tourism directly to community level institutions called Conservancies. Several conservancies have embarked on JVs. Under South Africa's Strategic Development Initiative, a wide range of JVs are developing. A range of structures have developed that are more complex than in other countries, including equity and lease arrangements for both development and operating companies.

Experience suggests that JVs can work but many factors that affect the likelihood of success are context specific. Particularly where JVs are being developed on communal land, the existence of strong community institutions with legal rights over land and resources is important. Problems facing communities are a lack of information on the market value of their assets and weak negotiating skills with the private sector although these can be addressed through facilitation. Overall, lessons learnt suggest that critical factors that influence JV success include the presence of committed individuals, company philosophy, facilitation, time and trust, the nature of local institutions, enabling and/or constraining national policy and legislation context and tourism market trends. JVs should become easier to develop as experiences are disseminated but they will remain a niche market due to high transaction costs (Ashley and Jones 2001).

5.4 Pro-Poor Tourism Strategies and Experience

Pro-Poor Tourism (PPT) is defined as tourism that results in increased net benefits for poor people. PPT is not a specific product or niche sector but an approach to tourism development and management. It enhances the linkages between tourism businesses and poor people so that tourism's contribution to poverty reduction is increased and poor people are able to participate more effectively in product development.

Links with many different types of 'the poor' need to be considered: staff, neighbouring communities, land-holders, producers of food, fuel and other suppliers, operators of micro tourism businesses, craft-makers, other users of tourism infrastructure (roads) and resources (water) etc. There are many types of PPT strategies, ranging from increasing local employment to building mechanisms for consultation. Any type of company can be involved in pro-poor tourism - a small lodge, an urban hotel, a tour operator, an infrastructure developer. The critical factor is not the type of company or the type of tourism, but that an increase in the net benefits that go to poor people can be demonstrated.

The PPT partnership (www.propoortourism.org.uk) focuses on documenting international experiences and promoting local procurement, products and partnerships. PPT pilot projects have promoted strategies that tourism companies can use to increase the local development impact of their business in eastern and southern Africa. The focus has been on linkages that involve local people or enterprises and make business sense to the company.

A review of PPT strategies and experience identified several critical factors and common lessons that are highly relevant to Zambia. Critical factors that constrain or facilitate progress in PPT, and need to be addressed, are:

- Access of the poor to the market: physical location, economic elites, social constraints on poor producers.
- Commercial viability: product quality and price, marketing, strength of the broader destination.
- Policy framework: land tenure, regulatory context, planning process, government attitude and capacity.
- Implementation challenges in the local context: filling the skills gap, managing costs and expectations, maximising collaboration across stakeholders.

Case studies have revealed a number of lessons on good practice, which are:

- 1) PPT needs a diversity of actions, from micro to macro level, including product development, marketing, planning, policy and investment. It goes well beyond community tourism.
- 2) A driving force for PPT is useful, but other stakeholders, with broader mandates are critical. PPT can be incorporated into tourism development strategies of government or business (with or without explicit pro-poor language). Broader policy frameworks and initiatives outside tourism, such as land tenure, small enterprise and representative government, are also key.
- 3) Location matters: PPT works best where the wider destination is developing well.
- 4) The poverty impact may be greater in remote areas, though tourism itself may be on a limited scale.
- 5) PPT strategies often involve the development of new products, particularly based on local culture. But these should be integrated with mainstream products if they are to find markets.
- 6) Ensuring commercial viability is a priority. This requires close attention to demand, product quality, marketing, investment in business skills, and inclusion of the private sector.

- 7) Economic measures should expand both regular jobs and casual earning opportunities, while tackling both demand (e.g. markets) and supply (e.g. products of the poor).
- 8) Non-financial benefits (e.g. increased participation, access to assets) can reduce vulnerability; more could be done to address these.
- 9) PPT is a long-term investment. Expectations must be managed and short-term benefits developed in the interim.
- 10) External funding may be required and justified to cover the substantial transaction costs of establishing partnerships, developing skills, and revising policies (not generally for direct subsidies to enterprises).

Source: Ashley, Roe and Goodwin 2001

5.5 Relevance to Poverty Reduction

Small recently implemented projects cannot yet demonstrate clear success in creating new CBT products and reducing poverty. A review of NACOBTA in 2001, however, concluded that “most community based tourism enterprises are making an income that has changed their communities from being poor or very poor to being better off” (Nicanor 2001, p.34).

Other research on experience in Namibia cautions the way development impacts are assessed and highlights three facts that have challenging implications. Firstly, that summarising the development impact of tourism as ‘jobs and cash’ is an oversimplification. Local people have complex livelihood strategies, based on multiple land-uses and diversification of risk across several activities. These are affected by tourism in many ways, positively and negatively, directly and indirectly. Secondly, different types of community tourism ventures have different livelihood impacts. And thirdly, different people have different livelihood priorities (Ashley 2000).

Poverty reduction through PPT can be significant at a local or district level. PPT strategies do appear able to ‘tilt’ the industry, at the margin, to expand opportunities for the poor and have potentially wide application across the industry. However, they have made little dent in national aggregates so far, because initiatives are small-scale, site-specific, or at early stages of implementation. National impacts would require a shift across the sector, and will vary with location and the relative size of tourism (Ashley, Roe and Goodwin 2001).

6. The Way Forward

6.1 Conclusions

Community Based Tourism (CBT) is in its infancy but it is growing with tourism in general. There is more CBT than stakeholders are aware of but the income generated is extremely small. A few CBT projects have failed and many will struggle to be profitable resulting in disillusioned communities. The main reason for this is that much CBT has been inappropriately donor-driven not market-led. CBT has performed poorly due to multiple and conflicting objectives and vested interests, a lack of market research, weak linkages to the tourism industry, small marketing profile, low product quality and development levels in communities, internal community disputes and poor local governance, and a lack of information dissemination, coordination and planning and sharing of common lessons and good practice.

CBT has been most successful when it has been private sector driven ensuring commercial viability. Several tourism companies advise and promote highly successful CBT enterprises as a high proportion of tourists are interested in community and cultural activities. CBT is likely to remain an add-on product as Zambia is a relatively expensive destination. CBT that is commercially grounded has promising potential, but unless action is taken it is likely to be undermined by its weak legal status, lack of niche sector focus and tangible wider community benefit as this will deter the market (both tourists and potential investors).

CBT can work in Zambia but expectations of what, where and how it can deliver must be realistic. The Government needs to view CBT as a private sector activity in which it has a critical facilitation role to create a conducive environment. CBT works best when the wider destination is developing well and although the poverty impact maybe greater in remote areas, it is extremely difficult to develop CBT in less developed tourism areas. CBT is likely to remain a marginal component of the tourism industry and a wider range of actions are needed to increase benefits to the poor from tourism in Zambia. These go well beyond promoting community tourism although work at the grassroots level to develop enterprises and local capacity is one key component.

Pro-Poor Tourism (PPT) strategies and interventions are required. PPT is not a specific product or niche sector but an approach to tourism development and management. It enhances the linkages between tourism businesses and poor people, so that tourism's contribution to poverty reduction is increased and poor people are able to participate more effectively in product development. Links with many different types of 'the poor' need to be considered and the critical factor is not the type of company or the type of tourism, but that an increase in the net benefits that go to poor people can be demonstrated (Ashley, Roe and Goodwin 2001). Hence the focus of stakeholders in tourism in Zambia should be on linkages that involve local people or enterprises *and* make business sense to the tourism industry.

6.2 Recommendations

Stakeholders need to take a wide range of actions, from micro to macro level, to increase benefits to the poor from tourism in Zambia.

Adoption of an Industry Perspective and PPT Approach

There needs to be:

1. Greater focus on private sector driven local micro-enterprise development that is grounded in market opportunity and a broader industry understanding.
2. More effective management of expectation grounded in private sector reality.
3. Development of pro-poor tourism (PPT) interventions that provide more appropriate and sustainable roles (i.e. support roles such as the supply of agricultural produce and crafts) for communities tied directly to tourism companies.
4. Larger focus on business partnerships between communities and tourism companies (e.g. Joint Ventures).
5. More suitable and effective use of donor funding (utilizing industry-based market development principles) and monitoring and evaluation.

Improved Enabling Environment

There needs to be:

6. More appropriate roles for government as a facilitator rather than as an actor in the tourism industry.
7. Improved platforms for public/private sector dialogue on industry development.
8. Development of an appropriate framework to legalise and licence CBT enterprises, including minimum standards that ensure tourist safety.
9. Investment incentives for business partnerships between communities and tourism companies.
10. Better communication and planning for CBT development, especially in GMAs and other sensitive areas, to prevent land-use conflicts (e.g. between non-consumptive and consumptive tourism) and negative environmental impacts.

Upgrading of CBT

There needs to be:

11. Market research on CBT and cultural product development and potential market segments.
12. More focus on building and strengthening appropriate community institutions (e.g. trusts) and making them more accountable and transparent to ensure wider community benefit.
13. Cautious consideration of facilitation to form a CBT trade association that would have to incorporate business and legal expertise, as well as a business plan for the financial sustainability of the association.
14. More finance available to improve linkages between communities and the tourism industry.
15. Cost-effective community skills development in tourism including in-service training and exchange visits between CBT enterprises.
16. More concerted marketing of CBT products targeting different market segments.
17. Information dissemination, coordination and planning to ensure local and regional common lessons are learnt and good practice pursued. Sharing experience should reduce costs of spreading CBT approaches.

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Annex 1 NGO and Donor Survey

Survey for NGOs and Donors for an Inventory and Analysis of Community Based Tourism in Zambia

- 1. Name and address of organisation:**
- 2. Name(s), position(s) and contact(s) of person(s) completing the questionnaire:**
- 3. Please list any community groups involved in *direct* service provision to tourists (e.g. cultural villages, campsites, guided walks, entertainment) that your organisation is aware of in Zambia.**
- 4. Please list any community groups involved in *indirect* provision of goods and services to the tourism industry (e.g. food products, crafts) that your organisation is aware of in Zambia.**
- 5. Under which organisational programme area(s) does community based tourism activities fall?**
- 6. In which geographical area(s) is community tourism included in organisational activities?**
- 7. Please list any past and current technical and/or financial assistance provided to community based tourism activities stating briefly the activity, location, year(s), form of assistance and project cost (US\$).**
- 8. How does your organisation monitor and evaluate community tourism project impacts?**
- 9. What wealth and job creation has community tourism initiatives supported by your organisation brought to date?**
- 10. What constraints have been encountered in developing community tourism activities?**
- 11. Does your organisation plan to expand its work in community tourism in the future?**
- 12. Please list any other organisation(s) you collaborate with in community tourism development.**
- 13. Please feel free to add any comments and/or provide additional information.**

Annex 2 Commercial Tourism Operator Survey

Questions for Commercial Tourism Operators for an Inventory and Analysis of Community Based Tourism in Zambia

- 1. Name(s), position(s) and contact(s) of person(s) completing the questionnaire:**
- 2. What is the name of your tourism business?**
- 3. When was your tourism business established?**
- 4. Where is your tourism operation located?**
- 5. On which natural and cultural assets (e.g. wildlife, landscapes, traditional ceremonies, heritage) is your product based?**
- 6. Which of the following tourism products and services do you provide (please underline)?**

Game Drives
Walking Safaris
Hunting
River Cruises
Canoe Safaris/Trips
Fishing
Birding
Accommodation
Food and Beverages
Tour Operations
Cultural Entertainment (e.g. dance performances)
Homestead Stays
Visits to Local Villages
Visits to Local Development Projects
Visits to Local Attractions (e.g. missions, monuments, waterfalls)
Visits to Craft Producers (e.g. craft markets and workshops)
Retail of Handicrafts
Farm Tours
Volunteer Work
Other (please specify)

- 7. Do you have relationship(s) with other travel agents, tour operators and/or lodges?**

8. Approximately what percentage of the following market segments do you cater to:

- International Fly-in Tourists
- Hunters
- Backpackers
- Overland Trucks
- Self-Drive Tourists
- Volunteers/ Development workers
- Educational Visits
- Ex-Pat Residents
- Zambians
- Business Visitors
- Visiting Friends and Relatives

9. Approximately what percentage of your clients are interested in community/ cultural activities?

10. Do you market community/ cultural activities in your area? If yes, please state the activities.

11. If not, why not?

12. Have you given any technical assistance (in-kind and/or financial support) to a community tourism activity?

13. Do local communities supply any local goods and services to your tourism business (e.g. crafts, food products, construction, entertainment)?

14. What high potential opportunities are there for local communities in your area to benefit more from tourism directly and indirectly?

15. What are the constraints on community tourism activities?

16. What external support, if any, would you require to better support community tourism?

17. What certificates, licences and permits etc. do you have to operate your business?

18. What certificates, licences and permits (e.g. insurance, tourism enterprise licence, tax clearance certificate) would you require a community tourism enterprise to have if you were to do business with them?

19. How many people from the local community do you employ?

- 20. Please list any local community development projects/ income or profit sharing schemes supported by your tourism business.**

- 21. Please estimate the income generated through tourism (revenue and donations) given to local development projects to date.**

- 22. Please estimate the number of households in your community benefiting from any development projects supported.**

- 23. Has tourism had any negative economic, social and cultural impacts on your local area?**

- 24. How do you see the future of your tourism business and tourism in Zambia in general?**

- 25. Please feel free to add any comments and/or provide additional information.**

Annex 3 CBT Operators Survey

Questions for Community Based Tourism Operators for an Inventory and Analysis of Community Based Tourism in Zambia

- 1. Name(s), position(s) and contacts of person(s) completing the questionnaire:**

- 2. What is the name of your tourism business?**

- 3. When was your tourism business established?**

- 4. Who had the original idea to start the tourism business?**

- 5. Where is your tourism operation located?**

Distance by road from main tourist attraction (e.g. Park, Victoria Falls)	hours/km
Distance from a main tourism road	hours/km
Distance from an airport/ airstrip	hours/km

- 6. Which of the following products and services do you provide to tourists and/or tourism businesses (please underline)?**

Township Tours
Village Tours
Wildlife Walks
Canoe Trips
Fishing
Accommodation (e.g. camping, chalets, traditional houses)
Homestead Stays (in people's houses)
Traditional Meals/ Food and Beverages
Cultural Entertainment (e.g. music, dance and drama)
Tour Operations (e.g. visits to Parks, traditional ceremonies)
Food Production (e.g. honey, chickens, fruit)
Handicrafts (e.g. baskets, mats, carvings, pots, gemstones)
Construction (e.g. brick making, building, thatching)
Other (please specify)

- 7. Please list your tourism facilities (e.g. chalets, ablution block, shop, solar, fridge).**

- 8. Please list your prices for services provided to different types of tourists:**

9. What form(s) of communication do you use to take tourist bookings (please underline)?

Own Radio
Nearby Radio (e.g. ZAWA, Clinic)
Messages delivered through a Tour Operator/Lodge
Land Telephone
Mobile Telephone
Email
None

10. How do you market/advertise your business (e.g. signpost, posters, flyers, internet, through lodges/operators/local government)?

11. Do you have any special relationship(s) with tour operators, lodges, travel agents and/or NGOs (please list)?

12. Please give approximate percentages (%) to the ways tourists who visit learn about you?

Cooperating commercial operators (e.g. ChaChaCha, RPS)
Domestic travel agents (e.g. Voyagers)
Overseas travel agents (e.g. Sunvil Africa)
Tourist Board
ZAWA/ National Parks
Non-Governmental Organisations (e.g. WWF, WCSZ)
Local Government
Guidebook(s)
Internet
Own publicity (e.g. Posters, flyers)
Signpost(s)
Word of Mouth (through other tourists)

13. Please list any local competitors.

14. Which months of the year are you open?

15. Do you keep a visitors book?

16. How many tourists visited your business in 2004?

17. Please give an approximate percentage (%) of the type of tourists you receive:

Backpackers
Overlanders (trucks)
Self-Drive Tourists
International Fly-in Tourists
Hunters
Volunteers/ Development workers
Educational Visits
Ex-Pat Residents
Business visitors
Zambians

18. Who owns the land on which your tourism business is based (please underline)?

National Park
Private Individual/ Company/ Lease
Chief/ Communal Land
Government
Church
Not known
Other (please specify)

19. What sort of agreement do you have for the land/ site?

20. Is the tourism business communally or privately owned?

21. What is the organisational/ group set-up (please underline)?

Individual entrepreneur(s)/ Shareholders
Trust
Community Resource Board
Village Action Group
Committee
Society
Membership Association
Non-Governmental Organisation (NGO)
Other (please specify)

22. How many individual members (male/female) in the group?

Male
Female
Not Applicable

23. How many individuals (male/female) are now in full-time employment?

- Male
- Female
- Not Applicable

24. How many volunteers help run the business?

25. Please list any training and/or technical advice received (e.g. visitor handling, business development, craftsmanship) and the training provider(s):

26. What grants, loans and donations has your tourism business received and from whom?

27. How much total (gross) revenue did you earn from tourism in 2004?

28. How much net profit (total minus salaries, materials etc.) did you make in 2004?

29. Do you have any licences, permits and/or certificates to operate your tourism project (please list)?

30. What licences, permits and/or certificates do you think you need (please list)?

31. Please list any community development projects (e.g. education, conservation, health) benefiting (in-kind and/or financially) from your tourism business.

32. Please estimate the income (US\$) generated through tourism (revenue and donations) given to local development projects to date.

33. Please estimate the number of households in your community benefiting from any development projects supported by tourism.

34. Has tourism had any bad economic, social and cultural impacts on your community?

35. What are the most important limitations in developing your tourism business (please underline)?

Marketing
Communications
Skills
Accessibility
Seasonality
Ownership issues
Lack of community motivation
Other (please specify)

36. How do you see the future of your business and tourism in general?

37. Which other community tourism activities/projects (open or now closed) do you know of in your local area and/ or in other parts of Zambia?

38. Please give any comments and/or other information:

Annex 4 Persons Met and/or Contacted

Persons Met in Government Departments and Agencies

Department/Agency	Name	Position	Contact
Ministry of Community Development and Social Services, Livingstone	Vincent Kamwanya	Regional Officer, Livingstone	socwel@zamnet.zm P.O. Box 60181, Livingstone
MTENR, Lusaka	John Chiluwe Andrew Chilufya	Tourism Development Officers	Kwacha House, Cairo Road P.O. Box 34011 Lusaka 01 229420 Chilufya67@yahoo.com johnchiluwe@yahoo.co.uk
MTENR, Livingstone	Harold Mweene	Regional Tourism Coordinator	haroldcmweene@yahoo.com 097 807949
NMB	Mr. M. N. Chellah	Executive Director CMCC	P.O. Box 630189 Choma cmcc@coppernet.zm 03 220394
ZAWA	Gershom Chilukusha Rose Chivumba Shabalu Mr. Mwenya Aaron Phiri	Director – GMAs Manager – Commercial Services Tourism Development Officer LNP Park Ranger	chilukushag@zawa.org.zm shabalur@zawa.org.zm Private Bag 1, Chilanga Aaronphiri2002@yahoo.com
ZNTB	Charity Chanda Lumpa	Managing Director	Cclumpa.tourism@zamnet.zm 01 222714
ZNTB Livingstone	Jocelyn Namula Mutinta	Acting Tourism Services Manager	Tourism Centre, Mosi-O-Tunya P.O. Box 60342, Livingstone zntblive@zamnet.zm 097 897790

Other Resource Persons Met and/or Contacted

Name	Contact
Adam Pope Whydah Consulting Ltd.	adampope@zamtel.zm 097 827610
Jeremy Pope	cfz@microlink.zm
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Simon Burgess Game Management Ltd.	sibur@zamnet.zm
Wade Seymour	097 805483

Persons Met and/or Contacted in Funding Agencies and Non-Governmental Organisations

Organisation	Name	Position	Contact
AP Liuwa Plain National Park	Tom Turner Jeroen Eichhorn Juraj Ujhazy	Park Manager Assistant Project Co-ordinator Community Development Volunteer	tom@africanparks.co.zm jeroen@africanparks.co.zm juraj.ujhazy@gmail.com
AWF	Simon Metcalfe Henry Mwima Nesbert Samu	Technical Director Southern Africa Program Director Regional Projects Manager	simonmet@mweb.co.zw hmwima@iwayafrica.com nsamu@zamnet.zm 03 321516
CARE	Ellen Highland		hchirwa@coppernet.zm highlandhams@yahoo.com 095 915924
NRCF	David Mulolani	Coordinator	01 266412/ 367 dmulolani@yahoo.co.uk nrcf@zamnet.zm
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CMCC	Bert Witcamp	Advisor Marketing & Design Unit	cmarket@coppernet.zm 03 220394
CELIM (Volunteers Italy)	Maurizio Magli	Project Coordinator Siavonga	celim@zamnet.zm 01 511017
DSI	Frank Van Dixhoon Mwape Sichilongo	Implementing agency Mumbwa CBNRM Project	frank@dsi.org.zm mwape@dsi.org.zm
Elephant Pepper Development Trust	Anja Held Michael Gravina		held@zamnet.zm 097 866732 mick@elephantpepper.org 03 322089
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Kasanka Trust Ltd.	Edmund and Kim Farmer	Park Managers	P.O. Box 850073 Serenje wasa@kasanka.com
KNP Promotions	Wilfred Moonga	Tours & Training Coordinator	Wilfred@knp-promotions.com info@knp-promotions.com 01 266276/ 927
MATEP	Tamara Gondwe-Scott	Tourism Advisor	Tamara_Gondwe-Scott@dai.com 097 863739
MCA	Fanwell Moonga	Coordinator	c/o WWF or Mazabuka 097 827430
NLCP	Hugo van der Westhuizen		Hugo@fzs.org

Organisation	Name	Position	Contact
Peace Corps	Katey Harris	Volunteer, Nakapalayo	Kate4@u.washington.edu
PROFIT, Choma	Joshua Enoch David		097 610661 097 707976 097 704538
SEKA	Miranda Guhrs	Managing Director	P.O. Box 100, Mfuwe seka@zamtel.zm 06 246015
SNV	Kim Shelsby	Senior Private Sector Development Advisor	kimshelsby@snv.org.zm 097 566002
Source Connection Foundation	Marlon Van Hee Benson Musuku	Community Tourism Expert/ Board Member Zambia Coordinator	P.O. Box 35506 Lusaka Benson_musuku@yahoo.co.uk 097 815475
UNDP	Winnie Musonda		Winnie.musonda@undp.org
USAID	Tamara Gondwe-Scott	Tourism Advisor MATEP Project	097 863739
West Lunga Trust	Charles Rea	Secretary	P.O. Box 10 Mwinilunga crea@zamtel.zm 08 361033
World Bank SEED	Shaun Mann Marie Sheppard Richard Sikananu	Tourism Development Specialist, Africa Private Sector Development Advisor Technical Coordinator Tourism	smann@worldbank.org msheppard@worldbank.org Stanley House P.O. Box 60563 Livingstone 03 321630 seedstone@zamnet.zm ricardosik@yahoo.com
World Challenge	Linda Shenton	Country Coordinator	rshenton@zamnet.zm
WCS	Dr. Dave Lewis		wcszambia@uuplus.com wczam@coppernet.zm
WWF Zambia Coordination Office	Nalumino Nyambe Kwali Mfuni	Project Leader Communications Officer	wetlands@zamtel.zm 01 255598/ 097 770955

Persons Met and/or Contacted in Community Based Tourism

	CBT Initiative	Name	Position	Contact
1	Chiawa Community Campsite (CCC), CHICODA	Jones Katiyo Oliphans Madzwanya	Founding Members	097 755942 097 755941
2	Chipundu Livingstone Memorial Committee			c/o KTL
3	Dudumwenzwe Campsite	Highland	CARE Livingstone	highlandhams@yahoo.com 095 915924
4	It's Wild Bushcamp Adventures:	Aida Lungu	Camp Manager	wclusak@coppernet.zm
5	Chikwa Camp	Skeva Manda	Housekeeper	01 226082
6	Chifunda Camp	Kunda Chisulo	Chef/Kitchen	
6	Mwanya Camp	Langslord Mbewe	Assistant	
7	Kabwata Cultural Village	Patrick Kasoka Christopher Simasiku	Chairman Vice Chairman	097 705338 097 534045
8	Kafumba Kwale Community Lodge	Nicolas Kabambo	Waiter/ Guide	c/o DSI
9	Kawaza Village Tourism Project (KVTP)	Maxwell Chimba	Assistant Secretary	c/o RPS
10	Liuwa Plain National Park:	Chief Muyunda Muyunda Mundandwe		c/o AP
11	Kwale Campsite	Simushi Naymbe	Campsite Attendants	
12	Katoyana Campsite	Agrey Kameme		
13	Lochinvar Community Campsite	Mr. Mwiinga Phiri	Choonga CRB Chair	c/o ZAWA LNP
14	Mandiya Village	Vincent Malombo		c/o Source Connection Foundation
15	Mukuni Development Trust	Chief Mukuni and the Supreme Council Mupotola Siloka	Patron Chairperson	097 720565 mukunitrust@yahoo.com
16	Muwele Cultural Village	Franklin Daniel Kamfwa Ivy Kabaso	Board Secretary Treasurer	c/o P.O. Box 450121 Mpika
17	Nakapalayo Tourism Project (NTP)	Jackson Kasama	Project Director	c/o KTL wasa@kasanka.com
18	Natwange Community Campsite	Francis Mulenga Richard Mwamba Boster Mweene	Campsite Attendant Campsite Attendant ZAWA NLNP SWPR	c/o ZAWA NLNP

	CBT Effort	Name	Position	Contact
19	Nsendamila Cultural Village	William Kakumbi	Former Chairperson	c/o SEKA
20	Nsoke Community Safari Camp	Jackson Ng'andwe Daison Chibune Godfrey Chanda Frious Chibale Meleck Mulenga	Camp Manager	c/o ZAWA Chikuni, Mpika
21	Nsongwe Village	Dragan Zondani Alice Sianga	Chair of Local Board Tour Guide	097 335299
22	Shantunka Village	Florence	Host	097 629625
23	Simonga Village Tourism Project	Headlady Inonge Bernard Mayumbelo	Host Planner and Guide	simonga@yahoo.com 097 870542 (sms)
24	Simonga Village Visit Fund	Bernard Mayumbelo		As above
25	Tikondane Community Centre	Elke Kroeger-Radcliffe	Volunteer Director	tikocc@zamtel.zm 06 252122

Persons Met in Other Conservation, Craft, Micro Entrepreneurial or Community Initiatives Related to Tourism

Initiative	Name	Position	Contact
Benson and Charles Township Tours			
GMH Football Academy	Godfrey		gmhfootballacademy@yahoo.com 03 321912/ 097 752747
Local Cowboy Cycle Tours	Cliff Sitwal	Guide	P.O. Box 61297 Livingstone 097 747837
Mango Tree Crafts	Shadreck Manda Kelvin Phiri	Chairman Secretary	P.O. Box 120 Mfuwe Or c/o Tribal Textiles
Madzibambera Crafts, MAPCAP	Peetor Mbewe Jackson Tembo	Secretary Sales Person	P.O. Box 9, Mfuwe
Mumwa Crafts Association	Mr. Mundia		P. O. Box 910431 Mongu mcacrafts@zamtel.zm 07 221263
Mwanachingwala Conservancy	Fanwell Moonga		Mazabuka 097 827430
Zintu Crafts	Marta Zulu	Weaver	Plot 1653 Panganani Road Lusaka 096 759394

Persons Met and/ or Contacted in the Commercial Tourism Sector

Name of Commercial Tourism Operator	Contact Person(s)	Contact Email/ Telephone	Location(s)
1. Africa Experience: - Lunga River Lodge - Busanga Bushcamp	Ed Smythe GM	info@experienceafrica.com	Northern Kafue NP Central
2. Alendo Travel & Tours	Maria & Alexis	alendo@zamnet.zm 097 696009	Lusaka
3. Bush Buzz Ltd.	Nathalie & Bas Van Soest	info@bush-buzz.com 097 801374	Lusaka
4. Bushcamp Company	Andy Hogg	info@bushcampcompany.com	Mfuwe Southern
5. Bushtracks Africa	Kirrit	victoriafalls@bushtracksafrica.com operations@bushtracksafrica.com 03 323232	Livingstone Southern
6. Bwaato Adventures		bwaato@zamnet.zm	Livingstone Southern
7. ChaChaCha Backpackers	Richard Chris	cha@zamtel.zm	Lusaka
8. Chaminuka	Maxwell Masempela GM Andrew Sardanis	max@chaminuka.com	Lusaka
9. Chete Island Safari Lodge		chete@zamnet.zm	Lake Kariba Sinazongwe
10. Chiawa Camp – G & G Safaris Ltd.	Grant Cumings Managing Director	grant@chiawa.com	Lower Zambezi NP
11. Chongwe River Camp	Chris Liebenberg Owner	2chongwe@bushmail.net NB No attachments	Lower Zambezi
12. Drifters		drifters@drifters.co.za	Canoe Tours Lower Zambezi
13. Eagles Rest Chalets		eagles@zamnet.zm	Siavonga, Lake Kariba
14. Ecolift Ltd.	Ross Ferguson	097 829306 ecolift@zamnet.zm	Livingstone
15. Faulty Towers	Richard Chris	ahorizon@zamnet.zm 03 323432	Livingstone Southern
16. Flatdogs Camp	Adrian Coley	ade@flatdogscamp.com	Mfuwe Southern

Name of Commercial Tourism Operator	Contact Person(s)	Contact Email/ Telephone	Location(s)
17. Gwabi Lodge	Alan & Ann Wardle Managers	gwabi@zamnet.zm	Chirundu, Lower Zambezi
18. Gwembe Safaris: - Gwembe Lodge - Lake View Chalets - Chikanka Island	Brooks family	gwemsaf@zamnet.zm	- Livingstone - Choma - Lake Kariba
19. Houseboat Company		zambianhouseboats@zamnet.zm	Lake Kariba
20. Isanga Bay Lodge		isangabay@hotmail.com 096 646991/ 2	Lake Tanganyika
21. Islands of Siankaba	Simon & Bonnie Wilde	siankaba@zamnet.zm	Livingstone Southern
22. Jungle Junction Bovu Island	Brett Murray Saunders	brett@zamnet.zm	Livingstone Southern
23. Jollyboys Backpackers	Becx Whitefield	jollybs@zamnet.zm	Livingstone Southern
24. Kafunta Safaris: - Kafunta River Lodge	Anke Cowan	kafunta@super-hub.com	Mfuwe Sothern
25. Kaingu Lodge		Kaingu.lodge@super-hub.com	Namwala GMA, by KNP, Southern
26. Kanyemba Lodge	Ricaddo Garbaccio	info@kanyemba.com	Lower Zambezi
27. Karibu Safaris: - Lower Zambezi River Camp (f.Kiambi)	Jimmy	info@kiambi.co.za	Lower Zambezi
28. Kasanka Trust Ltd: - Wasa, Luwombwa - Shoebill	Edmund Farmer	Edmund@kasanka.com	Kasanka NP Bangweulu
29. Kasaka River Lodge	Hugo Fourie	zriver@bushmail.net NB No attachments	Chiawa GMA Lower Zambezi
30. Kayila Lodge		safpar@zamnet.zm	Chiawa GMA Lower Zambezi
31. Kingfisher Houseboat	Annabel	annabelfaulks@yahoo.co.uk or taonga@zamnet.zm	Livingstone Southern

Name of Commercial Tourism Operator	Contact Person(s)	Contact Email/ Telephone	Location(s)
32. Kutandala Camp	Rod Tether	kuta@inmarsat.francetelecom.fr (NB No attachments)	North Luangwa
33. Lechwe Lodge	Fergus & Di	kflechwe@zamnet.zm 095 704803	Kafue Town
34. Lilayi Lodge		lilayi@zamsaf.co.zm 01 279022	Lusaka
35. Livingston Quad Co. (Batoka Sky)		freedom@zamnet.zm	Livingstone
36. Luangwa Crocodiles & Safaris	Keith Asherwood MD	ashy@zamtel.zm	Musalangu GMA Chifunda Block
37. Makora Quest	Colin & Mary Lowe	quest@zamnet.zm or safari@zamnet.zm	Livingstone Southern
38. Moorings Campsite	Tom & Thea Savory	tsavory@zamnet.zm	Monze
39. Mukambi Safari Lodge	Robin & Edjan van de Heide	mukambi@zamnet.zm	KNP Central
40. Mutemwa Lodge	Gavin Johnson	Mutemwa.lodge@mweb.cp.za	Western Province
41. Mutinondo Wilderness Ltd.	Mike and Linda Merrett	2MWL@bushmail.net NB no attachments	Mpika Northern
42. Natural Mystic Lodge	Cathy	nmlodge@zamnet.zm	Livingstone Southern
43. Nchila Wildlife	Peter Fisher	nchila@iwayafrica.com	NW Province
44. Ndole Bay Lodge	Gerard & Barbara Zytkow	ndolebay@coppernet.zm	NW Sumbu NP boundary
45. Norman Carr Safaris: - Kapani Lodge	Christina	kapani@normancarsafaris.com	Mfuwe Southern
46. Pioneer Campsite - Game Ranch - Chamafumba Camp	Chris & Beatrice Wienand	2pioneer@bushmail.net Tel: 096 432700 NB No attachments	Lusaka South Luangwa Kafue
47. Prohunt Zambia	Barry Bell-Cross	gbcross@zamnet.zm	NW Province

Name of Commercial Tourism Operator	Contact Person(s)	Contact Email/ Telephone	Location(s)
48. Remote Africa Safari: - Tafika, Chikoko Trails - Mwaleshi Camp	John & Carol Coppinger	tafika@remoteafrica.com	North & South Luangwa
49. River Club – Wilderness Safari	Peter Jones CEO Paul & Shereen	peterjones@wilderness.co.zm 097 892179	Livingstone Southern
50. Robin Pope Safaris	Jo Pope	jo@robinpopesafaris.net	South Luangwa
51. Royal Zambezi Lodge	Mr. A. Fouche	rzi@iwayafrica.com	Lower Zambezi
52. Sausage Tree Camp	Jason Mott MD	info@sausagetreecamp.com	Lower Zambezi NP
53. Safari Par Excellence	Tony King	safpar@zamnet.zm speres@mweb.co.zw	Lower Zambezi Livingstone
54. Shiwa N'gandu	Charlie and Jo Harvey	2gameman@bushmail.net NB No attachments	Northern
55. Shiwa Safaris Kapishya/ Buffalo Camp	Mark Harvey MD	2Mark@bushmail.net NB No attachments	Kapishya Springs NLNP
56. Shenton Safaris: - Kaingo Camp - Mwamba Camp	Juliet & Derek Shenton	info@kaingo.com kaingo@super-hub.com	South Luangwa NP
57. Songwe Point Village - Kwando Safaris	Emmanual Shinga Victoria Assistant GM	songwe@kwando.co.za	Livingstone Southern
58. Star of Africa: - Sussi & Choma House - Kulefu Tented Camp - Chichele/ Puku Ridge - Lechwe Plains	Emma Marketing Manager	reservations@starofafrica.co.zm	Livingstone LZNP SLNP Lochinvar
59. Sun International (SI) Ltd.	Musungaila Stain Mupeta Corporate Affairs	smupeta@sunint.co.za 095 771620	Livingstone Southern
60. Swanepoel & Scandrol Safaris Ltd.	Peter Swanepol	P.O. Box 30305, Lusaka 01 291339/ 097 843340	Mumbwa GMA
61. Taita Falcon Lodge	Anmarie Fourie Director	taita-falcon@zamnet.zm 03 321850	Livingstone Southern
62. The Clubhouse - The Guesthouse	Paola Dal Bosco	clubhouse@siansowa.com or siansowa@iwayafrica.com	Lake Kariba Southern

Name of Commercial Tourism Operator	Contact Person(s)	Contact Email/ Telephone	Location(s)
63. The Travel Shop	Stacey Wilmot	tsmarketing@microlink.zm 01 255559/ 253194	Arcades Lusaka
64. Thorn Tree Safaris Ltd.	Claire Powell Director	thorntreesafaris@zamnet.zm	Kasama Northern
65. Tongabezi	Ben Parker	tonga@zamnet.zm ben@tongabezi.com	Livingstone Southern
66. Viaggi Solidali (Italian Operator)	Michele Franceschi Tour Leader	mopane@inwind.it	Tours Kasanka and NLNP
67. Voyagers		headoffice@voyagers.com.zm kitwe@voyagers.com.zm Lusaka travel@voyagers.com.zm	Ndola Copperbelt
68. Wild Side Tours & Safaris	Peter & Karen Kermer	wild@zamnet.zm	Livingstone Southern
69. Wild Tracks Adventure Camp		mukwa@uudial.zm 01 256442/ 097 728145	Lower Zambezi
70. Wildlife Camp	Patsy Hahn	wildlife@super-hub.com	Mfuwe Southern
71. Zambian Safari Co.	Nickson Chilangwa Manager	reservations@zamsaf.co.zm	Lusaka
72. Zambezi Royal Chundu Safari & Fishing & Tree-Tops Lodges	Morze family	mail@royalchundu.com or mail@tree-tops.com	Livingstone Southern
73. ZigZag	Andy	zigzag@zamnet.zm	Livingstone Southern