

A Study of the Nature-Based Tourism Supply Side in Zambia - 2005

A Study Funded by the World Bank

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1. Executive Summary

2. Introduction

This Nature-Based Tourism Supply-Side Study has been prepared in four parts:

- 1) background to and infrastructural and trading characteristics of Zambian nature-based tourism providers;
- 2) a description of the tourist supply-side and the characteristics of supply agents and of incoming tourists;
- 3) a description of nature-based tourism contributions into the local and national economies; and
- 4) the financial breakdown of tourism packages including an assessment of leakage.

Linkages between parts are elaborated where relevant.

Part 1. Background and Infrastructural and Trading Characteristics of Nature-Based Tourism Product Providers

3. Brief Background to the Sector

Zambia's tourism industry has experienced major growth over the last five years and is now positioned to become a large player in the region. Table 1 indicates the growth trend and the source of tourists in recent years.

Table 1 Tourism Arrival Statistics 1999 to 2004

International Tourist Arrivals by Country of Residence						
Country of Residence	1999	2000	2001	2002	2003	2004
Southern Africa	243,060	217,572	234,017	268,782	274,701	290,199
East Africa	25,568	32,191	34,624	39,768	40,644	42,937
North Africa	1,346	529	569	654	668	706
West Africa	1,334	1,131	1,216	1,397	1,428	1,509
Central Africa	30,634	43,056	46,310	53,190	54,361	57,428
Europe	67,253	105,409	113,376	130,219	133,087	140,595
America	15,121	27,469	29,545	33,934	34,682	36,638
Asia and Oceania	19,931	30,062	32,334	37,138	37,956	40,097
Total	404,247	457,419	491,992	565,081	577,526	610,109

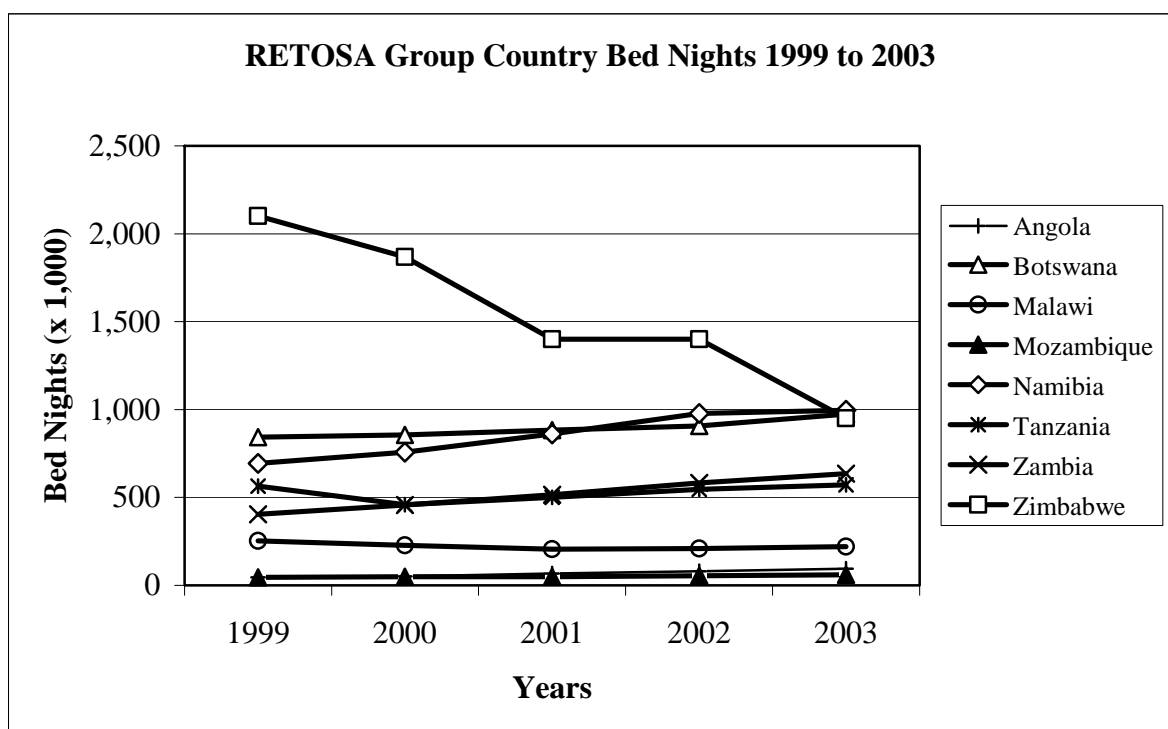
Source: Ministry of Tourism, Environment and Natural Resources

Projections from these data suggest that Zambia’s tourist arrivals by 2015 could reach 2 million per annum.¹ Achieving this transition will depend on a combination of key policy decisions on: the fundamental volume and density structure of the industry; rapid development of the limited the human resource base; a major attempt to establish a public-private national planning and marketing capability; and building confidence in existing and new investments.

Extrapolating from present trends, Zambia will only be generating just over 1 million tourists a year in 2015, nine years hence.

Zambia’s main competitors in the region in order of importance are South Africa, Botswana, Namibia, Zimbabwe, Tanzania and Malawi. Figure 1 demonstrates the respective trends in tourist arrivals to the immediate neighbour countries to 2003.

Figure 1 Trends in Tourist Arrivals in the Region 1999 to 2003



Source: RETOSA, 2005

Major contributors to Zambia’s recent growth in tourism arrivals have been: the investment of the Sun Hotel Group in Livingstone and their spin-off sub-contracted suppliers; the associated improvements to Livingstone Airport to accommodate this increased airline traffic; improved operator marketing; improved circuit packaging; and a more diversified tourism product (that has been driven by the increased demand).

¹ Ministry of Tourism, Environment and Natural Resources, 2005

The most notable features of Figure 1 from a Zambian perspective are the following features:

- i) the sharp decline in Zimbabwean tourism, from which all countries, but especially Botswana and Zambia have benefited through diverted tourist traffic; and
- ii) that Zimbabwe, a country with arguably fewer tourist features than Zambia received over 2 million tourist five years ago.

Returning to the Zambian tourism arrival projection noted above, the challenge is clearly before us. Other factors notwithstanding, if Zambia cannot achieve a comparable tourism arrivals figure in 2015 to Zimbabwe's tourism arrivals in 1999 then there will have been a serious failure to grasp opportunities in the tourism industry. This issue and Zimbabwe's competitive advantages are discussed later in this report.

4. Background to the Study

This study was initiated as part of a package of World Bank-funded tourism studies that include:

- i) a national tourism demand-side survey;
- ii) a national tourism supply-side survey;
- iii) a survey of tourism-related incomes in game management areas (GMAs); and
- iv) a survey of tourism operations in the Livingstone area (as part of the Support to Economic Expansion and Diversification (SEED) Project.

This supply-side study has drawn on and expanded from the experiences of the Luangwa Safari Association Tourism Study of 2005.²

The principal intention of the new work is to establish the realistic contribution of the tourism industry to the Gross Domestic Product, with subsidiary objectives being:

- a) a much needed, detailed characterization of the tourism supply side in Zambia; and
- b) the establishment of a quantum for the leakage component in the sector; and
- c) an assessment of opportunities for the sector, and constraints to the realization of those opportunities.

² Luangwa Safari Association Tourism Study, Whydah Consulting, 2005

5. Methods Used

5.1 Method of Data Collection

Insufficient resources existed to undertake a comprehensive, operator-focused, on-site survey. As a consequence a total user questionnaire approach was adopted, aiming to reach all known, formally registered, tourism enterprises. Some resources were made available for on-site follow-up work.

The study was conducted in two parts:

- i) a tourism operator questionnaire, distributed electronically in Zambia to all known operators (and by hand where possible); and
- ii) a tourism agent questionnaire distributed electronically to a wide cross-section of international tourism agents (in all major source areas) serving Zambia.

As a sub-set of Part 1, the Consultant also used internal information and existing network linkages to compile a list of all known, nature-based tourism operations and to establish reasonable estimates of bed night availability, occupancy, employment levels and turnover.

5.2 Sequence of Events

The study commenced in November 2005.

A short initial period from 14th to 18th November was used to develop the questionnaires;

5.2.1 Part 1 – the Tourism Operator Questionnaire

The tourism operator questionnaire was tested in northern Zambia (because of the limited number of operators there, and their considerable diversity) from 30th November to 3rd December, 2005.

Following a conference call meeting with the World Bank sector team on 6th December, the questionnaire was then finalised and then distributed electronically between the 6th and 14th December, 2005. The questionnaire is included in Annex 1.

An introductory visit was made to Livingstone between 7th December and 9th December, 2005 to initiate the questionnaire in the highest density operator area.

The questionnaire was then followed up by telephone and e-mail in all areas during mid-January, 2006.

With few responses from the Lower Zambezi and Kariba areas, a follow-up visit was made to part of the Lower Zambezi and the Siavonga area of the Kariba area on 2nd February, 2006.

A continuing failure to secure responses from the Livingstone area necessitated a further follow-up visit to Livingstone from 6th February to 8th February, 2006.

Responses from key Lower Zambezi and Livingstone were still being received in late February-early March and response rates generally have been low from these areas.

5.2.2 Part 2 – the Tourism Agent Questionnaire

The tourism agent questionnaire was distributed electronically between 12th and 15th December, 2005. A copy is included as Annex 2.

In view of agents' attendance at the World Travel Market (WTM) in London and the International Tourism Fair in Berlin (ITB), the questionnaire was then followed up and/or queries responded to by e-mail between the 16th and 27th January, 2006.

5.3 Analysis of the Survey Approach

A number of anticipated difficulties were experienced and addressed with both questionnaires as work progressed.

5.3.1. Tourism Operator Questionnaire – Problems, Solutions and Overall Response

5.3.1.1 Questionnaire Implementation Problems and Solutions

The following issues had a bearing on the outcome of this study.

1) Firstly the questionnaire process commenced as most major tourism operators and tour agents were at WTM in London and then at ITB in Berlin.

This was an anticipated problem and was dealt with by re-sending questionnaires and following up once operators were expected to have returned from these events.

2) Secondly a large number of tourism operators managing dry season entities in the Luangwa Valley, the Lower Zambezi Valley; the Kafue National Park; Western Zambia; and some in Livingstone had already closed their operations in November and do not re-open until April. Several less seasonal operators closed over the Christmas and New Year period and only regained their operating momentum in February.

This problem was also expected, but was more difficult to address. Personal contacts helped, but several of the seasonal operators in southern Zambia are based in, or have links with Zimbabwe, South Africa, Botswana and Namibia and were not contactable and thus responses from these operations are largely missing from the survey.

3) Thirdly, a large number of operators in the Livingstone, Kafue and Western Province areas are relatively new arrivals from Zimbabwe, Botswana, Namibia and South Africa and have not yet been fully integrated into the Zambian tourism industry. To illustrate this, neither the Zambia National

Tourism Board (ZNTB), nor the Tourism Council of Zambia (TCZ), and its constituent Tour Operators Association of Zambia (TOAZ) have detailed contact data for operators in Western Province, or for many operations in the Livingstone area.

This difficulty was expressed in various ways that impacted on the survey. At the outset it was difficult to access these operators. Once contact addresses were located there was either limited, or in the case of Western Province, almost no response, from this category of operators. The difficulty was no doubt compounded by the absence of many of these largely seasonal operators in their home countries.

Solutions attempted included repeated follow-up e-mail messages and then sourcing ZNTB and operator web sites and tourism publications for operator details. Those data that were forthcoming were limited and certainly failed to contribute to the all important financial and economic analysis.

As a final attempt to gather data, a simplified questionnaire was circulated to a large number all non-responding operators in all areas. This did capture some additional information.

- 4) Fourthly, it was also expected that the more complex questions, relating to:
 - a) operator finances; and
 - b) detailed management data on geographic origins of clients and bookings;

would be poorly responded to. This proved to be the case, in spite of assurances that data would be handled confidentially and reported only in aggregated and analysed formats. Dealing with this omission required much additional work at the analysis stage, to extrapolate from known situations.

5.3.1.2 Responses

The data received was categorized into eight geographic regions, based on homogeneity of operator circumstances, being:

- i) Northern – northern-eastern Zambia north of the South Luangwa National Park;
- ii) South Luangwa – the South Luangwa National Park and immediately adjacent areas;
- iii) Lower Zambezi – the Lower Zambezi National Park and adjacent areas;
- iv) Lusaka – the nature tourism providers around Lusaka;
- v) Lunga, Kafue and Kafue Flats – the Lunga and Kafue River catchments including the Kafue National Park;
- vi) the Kariba lake shore;

- vii) Livingstone and the Rapids – Livingstone and the riverine zone immediately downstream, and upstream to Sesheke;
- viii) Western and North-Western Zambia – the Zambezi catchment upstream of Sesheke as far as Mwinilunga and Solwezi.

The responsiveness to the questionnaire is indicated in Table 2 which lists:

- a) the number of questionnaires distributed in each geographic area;
- b) the percentage response from each (a response being any data submitted); and
- c) the percentage comprehensive questionnaire response from each area (few questionnaires were fully responsive).

Table 2 Tourism Operator Questionnaire Response Characteristics

No. Operations	No. Questionnaires	Company Name	Some Information	Partially or Fully Completed
		Northern Zambia	100.0%	65.2%
27	23	Sub-total responses	8	15
		South Luangwa	83.3%	72.2%
47	36	Sub-total responses	4	26
		Lower Zambezi	82.4%	52.9%
36	17	Sub-total responses	5	9
		Kariba Shoreline	100.0%	84.6%
19	13	Sub-total responses	2	11
		Livingstone and the Rapids	67.6%	35.3%
56	34	Sub-total responses	11	12
		Western and North-Western Zambia	0.0%	0.0%
11	8	Sub-total responses	0	0
		Lusaka	66.7%	33.3%
3	3	Sub-total responses	1	1
		Lunga, Kafue and Kafue Flats	53.3%	26.7%
30	15	Sub-total responses	4	4
229	149	Total responses	40	81
		Overall percentage response	80.9%	54.4%

Questionnaires were distributed to all known tourism companies, with one questionnaire provided space for responses from all subsidiary operations. Overall, slightly more than 54% of operators responded to one of the questionnaires. Response rates in global terms (i.e. questionnaires returned over questionnaires distributed) by region, ranged from 26% to slightly over 84%. As several companies provided several

responses on one questionnaire, the overall response was higher than the nominal 54%.

5.3.1.3 Market Definitions and Exclusions

As discussed further below, the definition of nature-based tourism operations is open to a degree of subjectivity. The target group of nature-based tourism operations was defined for this study as any commercial tourism operation that has a) wildlife (in its broadest sense), b) wildlife-, or landscape-based cultural tourism, or c) landscape-based activity and adventure tourism as its core business.

Operations which are currently not operational, but were expected to be operational shortly, or where infrastructure exists, were included in the categorisation process and in the assessment of potential bed nights, but obviously did not contribute to other database content.

Questionnaires were distributed to all known operators meeting the above definition in late 2005. The collation of all known operators was based on information supplied by the Zambia National Tourist Board, the Tourism Council of Zambia, local tourism associations and from personal knowledge of the Consultant.

Inevitably there will be some omissions, lodges on game ranches being one. Also the tourism market is becoming more dynamic. New tourism operations are starting on a regular basis. Many small tourism operations commence as market testing experiences and regularize themselves once they believe a market exists. Other tourism operations are being bought, or sold, or close down. Several tourism operations function under the umbrella of holding companies, where capture of individual entities is difficult.

Attempts were also made to capture the hunting tourism sector, but this is a specialist market area with little interaction with national tourism planning. Extracting reliable information from the sub-sector will require investment in a one-on-one, confidence building process.

A particular area of interest is in the guest house/bed and breakfast category, which has demonstrated huge growth in the last five years, country-wide. Many guest houses, particularly in Lusaka and the Copperbelt are not formally registered and constitute growing competition to the hotel sector – with increasing efforts now being made to encourage enforcement. Guesthouse facilities have been included in this survey only in the Livingstone area - where they contribute to major nature-based tourism hub. But the definition of functional and partly-functional guesthouse enterprises was difficult in the time available and a discretionary approach was used. Several small guest houses also exist in the Mfuwe area, but they are less well established and represented than the Livingstone guest houses (where a formal representative association now exists), and were difficult to capture.

Nevertheless, in overall terms, the data established from this survey is believed to be comprehensive and representative. Certainly it can and should provide a starting point for a comprehensive, in-depth collation of all tourism enterprises.

5.3.1.4 Patterns of Response

As expected, the best responses to the survey were from the Kariba lakeside, the Luangwa Valley and the core Lower Zambezi area, because these areas had been surveyed previously, or in the case of the Kariba Shoreline almost all operators were personally visited by the Consultant.

A higher than expected response was received from Northern Zambia, again partly because of personal visits and partly because of an enthusiastic area representative.

The Lower Zambezi outside the national park had a lower than expected response, largely because of the seasonality of the area and the large number of operations that are not fully established, or are recent entrants to the sector.

In spite of an active Livingstone Tourism Association and two comprehensive visits the response from Livingstone was poor. The zero response from Western and North-Western Zambia may be partially explained by the seasonality of the operation. But overall the poor response is probably related to the relatively recent establishment of many of the operators in these areas, their strong marketing links with South Africa, Namibia and Botswana, with clients routing mainly directly, or transiting only through Livingstone - and consequently, thus far a marginal involvement in Zambian tourism.

The poor response from Lusaka-based operators cannot be explained.

The poor response from the Lunga River, Kafue National Park and Kafue Flats areas is largely related to a major transition in ownership of functional operations in the northern Kafue National Park and Kafue Flats, where organizations have sold their operations but new entities are not yet established.

Nevertheless, a 54% response overall is satisfactory for a largely unsupervised questionnaire and contains sufficient diversity of respondents to allow extrapolation of results within reasonable confidence limits.

3.3.2 Tourism Agent Questionnaire – Problems, Solutions and Overall Response

Several difficulties were anticipated with this questionnaire.

- 1) The tourism agent questionnaire process also suffered from a commencement as most major tourism operators and tour agents were at the WTM in London and then at ITB in Berlin.

This was also an anticipated problem and was dealt with by sending questionnaires at the end of WTM and following up once operators were expected to have returned from ITB.

- 2) Secondly, this questionnaire was distributed to a wide range of known tourist suppliers to the Zambian market in principal source areas: Southern Africa; the United Kingdom; Europe; the United States of America; and Australia. Attempts were also made to assess agent response in South

America; Russia and the Far East (Japan). The questionnaire was also distributed through tourism associations in North America, the United Kingdom and Europe. But questionnaire that are unsupported by personal presence are known to demand little attention from recipients and a poor response was expected.

To counter this, follow-ups were made by e-mail and in some cases by telephone.

3) Thirdly, the international tourism associations and many of the agents that were approached had had little, or no direct contact with Zambian tourism, or tour operators; either dealing with institutional bodies in Zambia, or through third party agents. Some agents in this category did respond, but expectedly, they knew little about Zambian tourism products or operators and could not contribute meaningfully to the questionnaire.

There was little that could be done about this difficulty, other than follow-up e-mails requesting clarifications where appropriate.

4) Finally, it was suspected that the Zambian tourism is still poorly known in many geographic market regions; with little marketing contact, very restricted agency footprints and very low sales volumes.

The questionnaire was specifically designed to test this hypothesis, but otherwise there was little that could be done to address the problem, given the resources that were available.

Table 3 lists:

- a) the number of questionnaires distributed in each geographic area; and
- b) the percentage response from each (a response being any data submitted - again very few questionnaires were fully responsive).

Overall the response to this questionnaire was very poor, in spite of follow ups. Particularly unfortunate was the complete lack of response from most of the important overland/backpacker agents, which cannot be explained.

It is interesting to note that the best response was from American (all United States) agents, although north Americans still represent a much smaller proportion of Zambia's international tourist client base than Europe.

Table 3 Tourism Agent Questionnaire Response Characteristics

No. Questionnaires	Company Name	Completed
	Overland Operators	
	Europe	
13	Sub-total responses	1
	Africa	
9	Sub-total responses	0
22	Total responses	1
	Percentage response	4.5%
	Tour Operators and FIT Agents	
	Australasia	
7	Sub-total responses	0
	Europe	
64	Sub-total responses	9
	Americas	
16	Sub-total responses	10
	Africa	
57	Sub-total responses	7
144	Total responses	26
	Percentage response	18.1%
166	Overall response	27
	Overall percentage response	16.3%

The poor response from South African and United Kingdom agents is also of concern, given that these are the two principal sources of tourists to Zambia (see Table 1). The absence of responses from Australia is also of concern given strong personal links and intimate Zambian experience that exists with agents in that country.

Nevertheless, given a long-distance, unsupervised questionnaire, an overall response of 16% is considered reasonable.

6. A Description of Zambian Nature-Based Tourism Products

6.1 Product Category

Zambia's tourism products are traditionally classified into the following categories:

- i) providers of tourist accommodation of various types for non-consumptive uses;
- ii) providers of hunting tourism services (professional hunters, hunting outfitters, game ranchers and taxidermists);
- iii) tourism activity providers;
- iv) tourism agencies (tour operators of various types and travel agencies)

This study examines only nature tourism providers and, therefore, excludes urban guest houses and hotels, unless they are located in areas offering nature tourism activities (such as Livingstone).

6.2 Infrastructure Classification and Categories

6.2.1 Infrastructure Classification

Nature tourism products in Zambia are traditionally classified into four principal categories (with subsidiary “star” rankings within each group):

- i) hotels;
- ii) tourist lodges;
- iii) guest houses;
- iv) bush camps and mobile safari camps; and
- v) activity providers.

Advantages will accrue in future to certification, standards and marketing from the adoption of a more sophisticated classification of providers. As a starting point this study has attempted to classify both accommodation establishments and activity providers into a more detailed range of categories based on three criteria for accommodation providers and two criteria for activity providers:

Accommodation Providers

- a) the type of structure;
- b) the number of beds offered; and
- c) the client group.

Activity Providers

- a) the activity category; and
- b) the activity type.

Annexes 3 and 4 display classifications of nature tourism accommodation and activity products, using this structured classification system. The classification has been used in this survey, but now warrants detailed consideration by tourism bodies.

6.2.2 Infrastructure Category

For the purposes of this study the following categories of accommodation providers were used in generally declining bed-night size (see Annex 3):

Hotel	Community Camp
Tourist Lodge	Bush Camp
Backpacker Lodge	Walking/Mobile Camp
Tourist Camp	Large Houseboat/Cruiser
Traveller Lodges	Small Houseboat Cruiser
Self-catering Camp	Camp Site

It is suggested that the expanding sector of guest houses be progressively classified into traveller lodges (for larger establishments below the hotel classification) and bed and breakfast units (for converted houses providing bed and breakfast accommodation)

Annex 5 contains basic details on all known, licensed nature-based tourism accommodation providers, by: infrastructure category; region; and bed-night capacity.

Table 4 indicates the summarised national scores and averages of nature-based tourism accommodation providers that were calculated from the responses to the operator questionnaire for: bed night availability, bed-night occupancy, operating season, turnover and employees. Table 5 provides this information in a regional context.

Figure 2 illustrates the national mixture of these accommodation types, Figure 3 the distribution of accommodation types by region and Figure 3 the distribution of accommodation types in each region.

Tourist lodges, camps and bush camps make up the 67% of all nature-based accommodation units and 46% of all bed availability, **but guest houses (traveller lodges and bed and breakfast establishments represent a significant and growing proportion (nearly 10% of all beds), especially expanding in the Livingstone area.**

Table 4 Summarised Characteristics of Zambian Nature-Based Tourism Operations, by Infrastructure Category

Category	No. Units	Ave. No. Months Operating	No Units	No. Beds	Ave. No. Beds	Average Occupancy	Total Bed Nights	Total Bed Night Utilisation	Turnover (million US\$)	%age of National Turnover	Permanent Employees	Ave. Permanent Employees	Ave. Bed/Staff Ratio
Hotels	12	12	12	1,024	85	45.6%	368,640	169,866	25.05	32.8%	840	70	1.2
Tourist Lodges	32	11	32	760	27	42.1%	230,580	100,102	22.48	29.4%	932	33	0.8
Backpacker Lodges	5	12	6	191	32	30.6%	67,320	25,510	1.75	2.3%	98	16	1.9
Tourist Camps	82	11	82	1,043	15	32.8%	289,620	81,366	16.68	21.8%	1,020	15	1.0
Traveller Lodges	25	12	25	408	16	34.2%	146,880	49,981	2.83	3.7%	325	13	1.3
Self-Catering Camps	3	9	3	38	13	38.3%	11,040	4,248	0.13	0.2%	21	7	1.8
Community Camps	3	7	3	24	8	35.0%	5,280	1,872	0.10	0.1%	19	6	1.3
Bush Camps	37	7	37	250	9	51.1%	39,900	16,519	4.42	5.8%	274	10	0.9
Walking/Mobile Camps	4	8	4	24	6	47.5%	5,580	2,466	0.66	0.9%	36	9	0.7
Large Houseboats/Cruisers	4	12	4	118	24	23.0%	42,480	7,812	0.98	1.3%	34	7	3.5
Small Houseboats/Cruisers	1	12	2	12	12	30.0%	4,320	648	0.08	0.1%	6	6	2.0
Camp Sites	18	12	18	537	34	34.4%	170,280	54,318	1.24	1.6%	107	7	5.0
Totals	226		228	4,429			1,381,920	514,709	76.40		3,712		
Averages per Category	19	10.4	19	369	23	37.0%	6,035	2,248	6.37			17	1.8

Figure 2 National Availability of Nature-Based Tourism Accommodation Units by Category

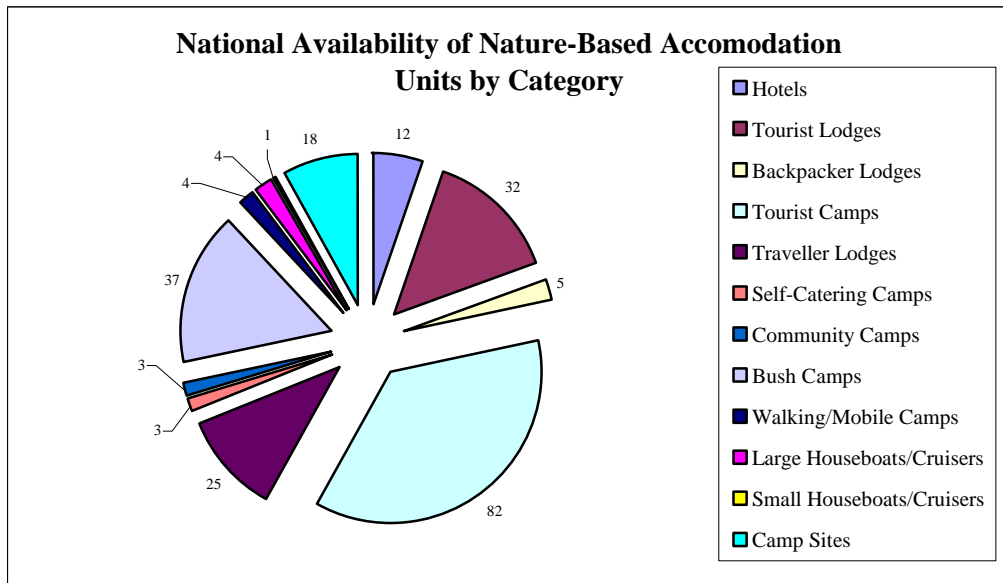


Figure 3 Breakdown of Nature-Based Tourism Accommodation Types by Region

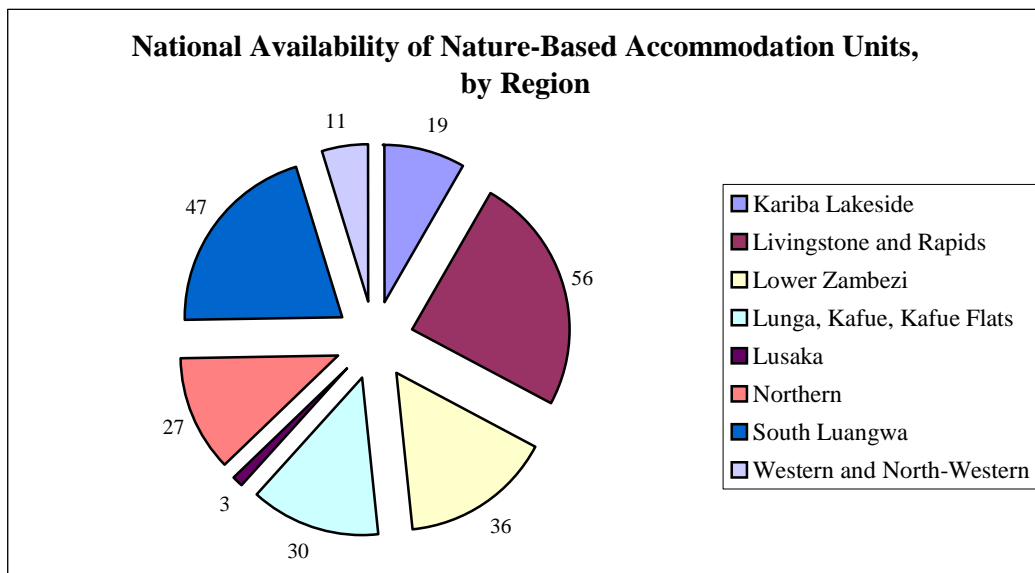


Table 5 Summarised Characteristics of Zambian Nature-Based Tourism Operations, by Region

Region	Ave. No. Months Operating	No. Units	No. Beds	Ave. No. Beds	Average Occupancy	Total Bed Nights	Total Bed Night Utilisation	Total Turnover (million US\$)	Average Turnover (million US\$)	Permanent Employees	Ave. Permanent Employees	Ave. Bed/Staff Ratio
Kariba Lakeside	12	19	495	26	27.6%	176,520	61,284	5.31	0.28	335	18	1.5
Livingstone and Rapids	12	56	1,704	30	38.5%	610,680	247,822	38.50	0.69	1,482	26	1.1
Lower Zambezi	8	36	498	14	34.7%	119,940	43,518	7.36	0.21	492	14	1.0
Lunga, Kafue, Kafue Flats	9	30	402	15	25.8%	102,540	23,833	3.05	0.11	263	10	1.5
Lusaka	12	3	136	45	45.0%	31,681	20,593	2.97	2.97	114	114	0
Northern	11	27	358	16	29.1%	100,080	23,031	2.57	0.11	177	8	2.0
South Luangwa	7	47	696	15	38.0%	181,380	71,790	12.68	0.27	683	15	1.0
Western and North-Western	9	11	128	12	38.2%	36,000	14,904	3.34	0.30	138	13	0.9
Totals		229	4,417			1,358,821	506,775	75.77		3,684		
Averages per region	10.0	29	552	22	34.6%	6,035	2,248	9.47	0.62	461	27	1.1

Figure 4 Breakdown of Nature-Based Tourism Accommodation Types in Each Region

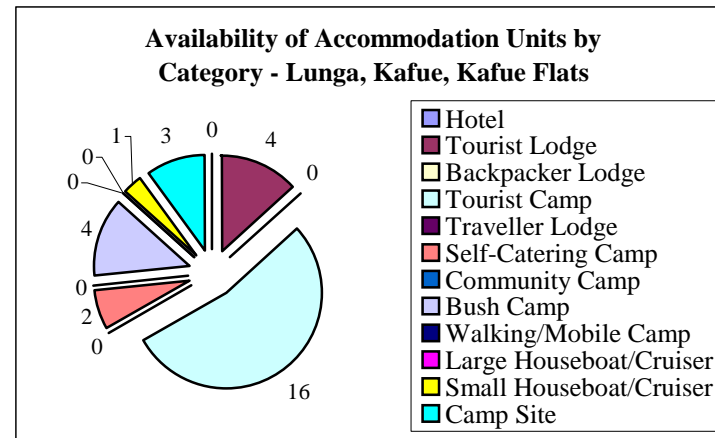
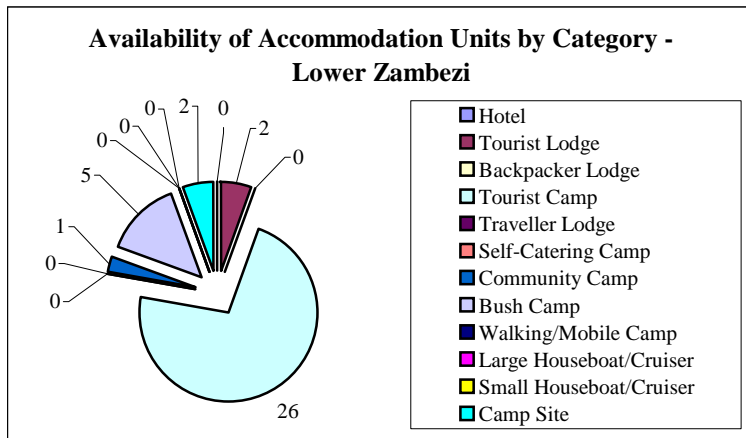
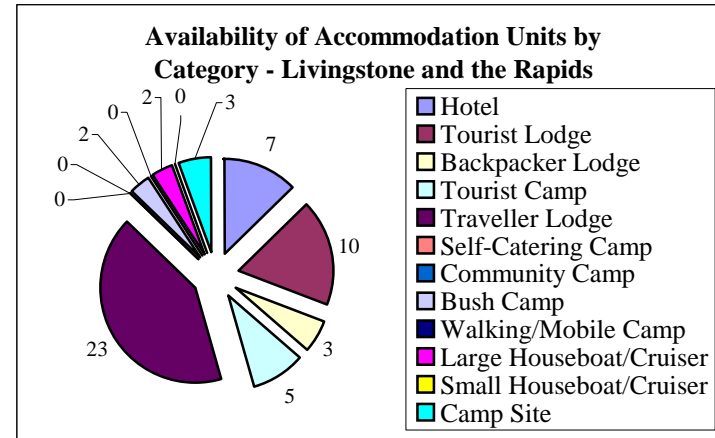
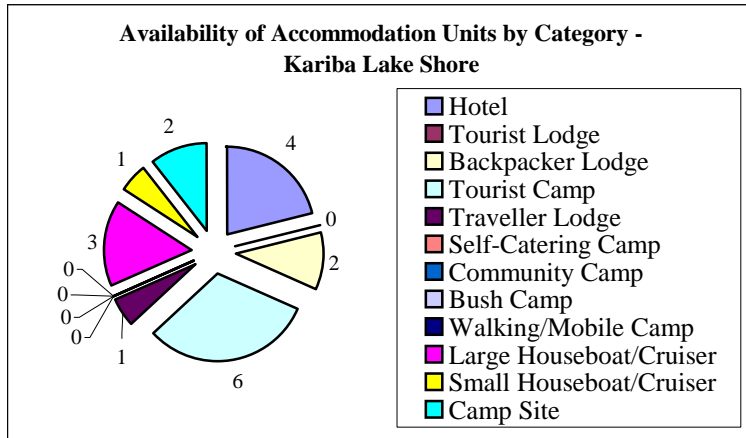
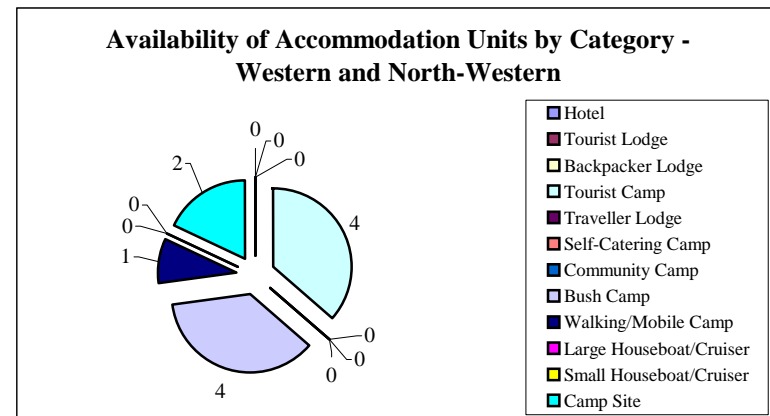
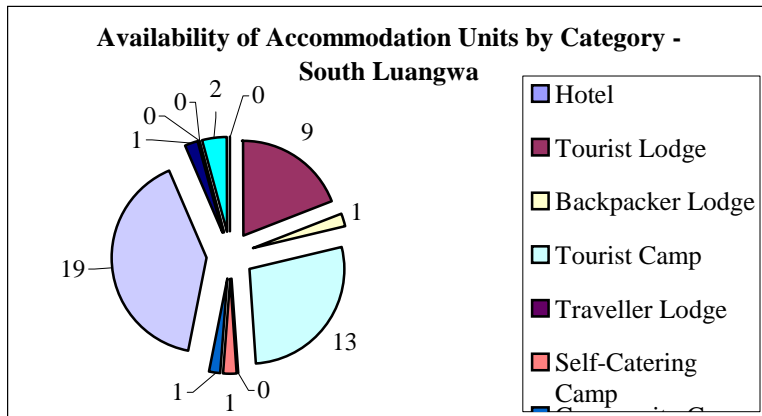
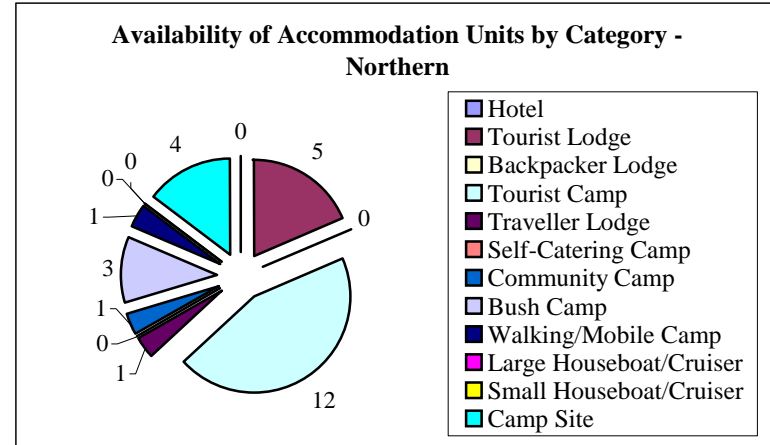
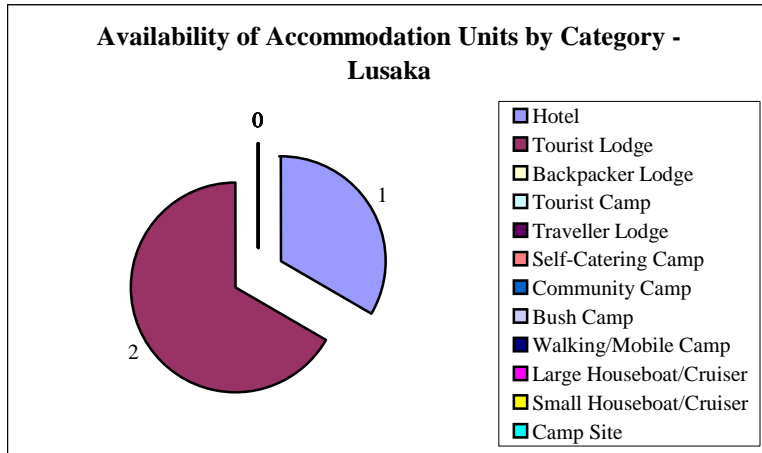


Figure 4 Breakdown of Nature-Based Accommodation Types by Region (Cont'd.)



The diversity of tourism accommodation is most noteworthy in areas offering a variety of potential activities. The Kariba lake shore, Livingstone and the Rapids, Northern and the South Luangwa are particularly noteworthy. Clearly potential exists for similar diversification in the Lower Zambezi and Lunga, Kafue, Kafue Flats regions as investments deepen.

It is noteworthy that there are less than 1,000 hotel beds available in Livingstone (less than a quarter of the capacity in Victoria Falls) and that as yet there are no hotel-classified establishments in the other core tourist areas. The Livingstone situation is changing rapidly, with four new hotel establishments under construction, or in preparation. This issue is discussed in more detail later in the report.

Main trends that emerge from the analysis are discussed individually, by topic.

6.3 Nature-Based Tourism Bed and Activity Capacity and Utilisation

The response to bed and bed night availability was satisfactory, but respondents were much more reticent about bed night occupancy – as they were with turnover and profitability information.

6.3.1 Nature-Based Tourism Bed Capacity

6.3.1.1 Bed Capacity by Accommodation Category

Bed capacity in nature-based tourism accommodation slightly exceeds 4,400 country-wide with hotels, backpacker lodges and traveller lodges contributing 37% of all beds (1,623 beds). Tourist lodges, tourist camps and bush camps contribute 46% of available beds (2,053 beds). Hotels and tourist camps each contributing the largest number of beds, each in excess of 1,000 beds - representing about 47% of all beds.

The other categories of accommodation contributing significant numbers of beds are (in declining contribution), tourist lodges (760), camp sites (537) and traveller lodges (408). The overall figures are likely to be underestimates because some establishments offer additional beds per room for families and others offer camping as an additional non-core service. These extras are difficult to capture reliably.

Figure 5 illustrates bed capacity by category and Figure 6 the average numbers of beds per accommodation category, which interestingly indicates a significant bed capacity in houseboats that has mainly been established in the last two years.

6.3.1.2 Bed Capacity by Region

A glance back at Table 5 shows the regional contribution to beds is dominated by the Livingstone area (1,704), followed by the South Luangwa (696), Lower Zambezi (498), Kariba Lakeshore (495), and then the Lunga, Kafue, Kafue Flats (402) and Northern region (358). Lusaka and the Western and North-Western regions contribute a further 264 beds. Figure 7 shows this bed capacity by region in graphic form.

Figure 5 Total National Nature-Based Tourism Bed Availability by Accommodation Category

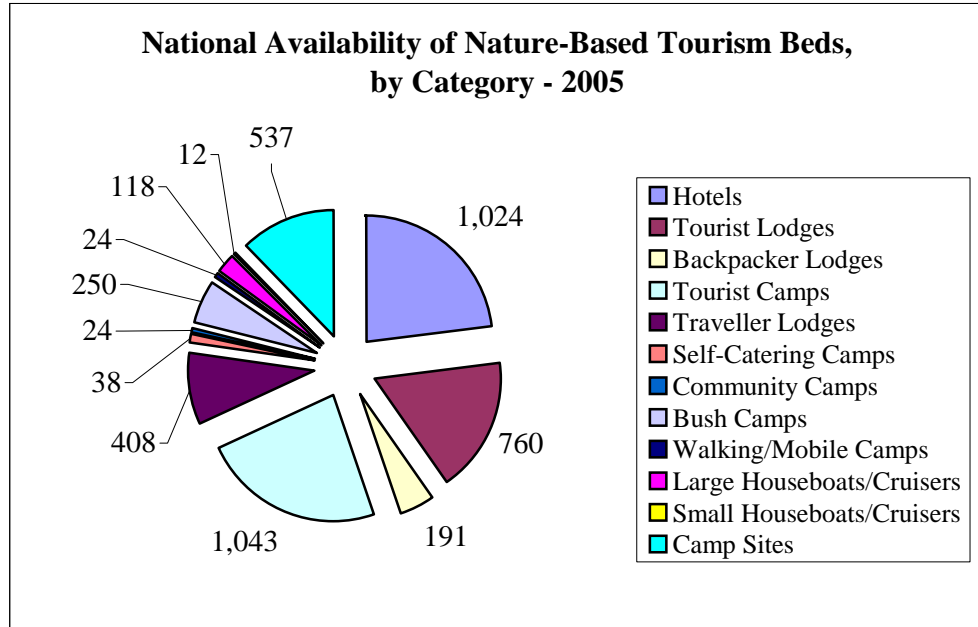


Figure 6 Average Number of Beds Per Nature-Based Tourism Accommodation Category

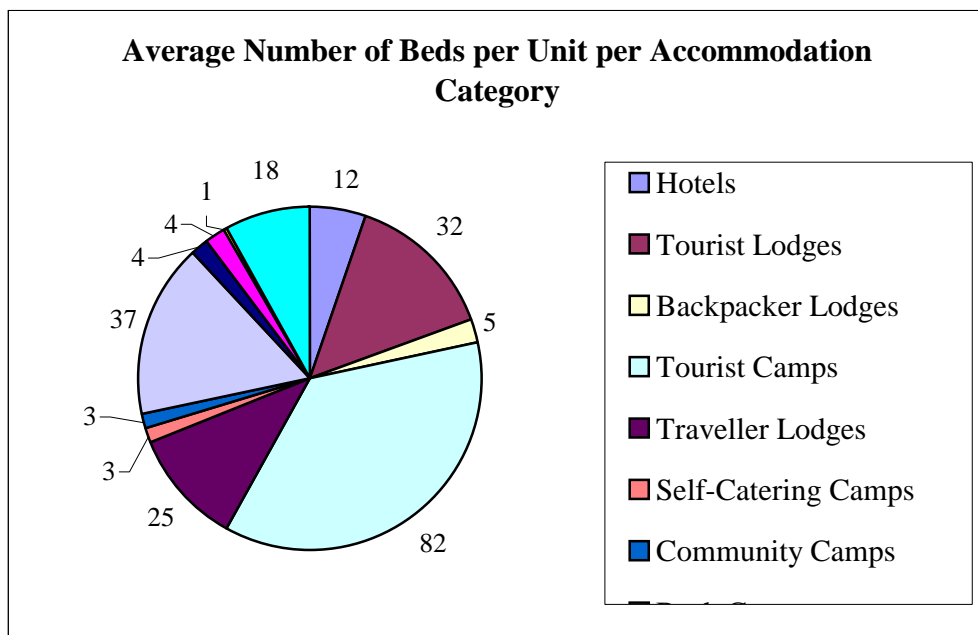
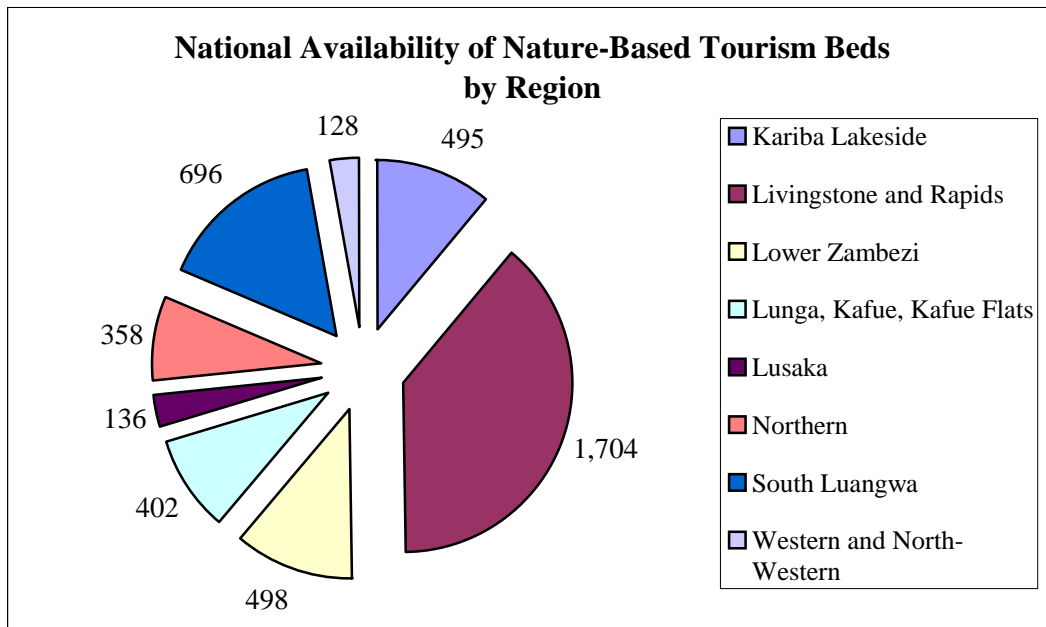


Figure 7 Availability of Beds in Nature-Based Tourism Establishments, by Region



6.3.2 Tourism Activity Capacity

Although most top-end tourism entities include tourism activities in their rack rate (package price) and lower end accommodation providers generally do not, tourism activities are a primary area of interest for the average tourist. Non-specific activities (game drives and walks) are usually offered in house, while more specific activities (bunji jumping and helicopter flights) are usually “extras” provided by specialist firms.

The growth in outsourcing of tourism activities has grown most noticeably, and exponentially in the Livingstone area, particularly since the full establishment of the Sun International hotels – principally because these entities are hotels and not tourism lodges, and are sited beside the Victoria Falls and Zambezi River. This behaviour has now created in excess of 25 tourism activity providers in the Livingstone area, most of which are independent of accommodation providers.

Table 6 lists the Livingstone activity providers. Some omissions may exist.

This pattern has yet to be replicated in other areas, but incipient trends are visible in the South Luangwa area (with independent game drive providers). A rapid development of this pattern elsewhere is unlikely in the short term - because specialist tourism activity providers dependent on a critical mass of tourists, in a reasonably confined area. Most of Zambia’s existing nature-based tourism has been established on the basis of high value/low density operations that are comparatively widely spread, and therefore do not meet the criteria for successful activity provider business.

Table 6 Tourism Activity Providers in the Livingstone Area

Abseil Africa	Rope activities
African Extreme	Rafting/Kayaking
Angle Zambia	Fishing
Batoka Sky	Flying
Victoria Carriage Company	Horse Carriage
Livingstone Quad Company	Quad bikes
African Queen	Boat trips
Birding with Bob	Birding
Bundu	Rafting/Kayaking
Bushtracks Africa	Transfers/drives
Zamcentive	Bush dinners
Bwaato Adventures	Rafting/Kayaking
Cholwe Adventures	Rafting/Kayaking
Gwembe Crocodile Farm	Crocodile farm
Jet Extreme	Jet boating
Kayak School	Kayaking
Livingstone Walking Safaris	Walking safaris
Local Cowboy Tours	Guided bike tours
Makora Quest	Rafting/Kayaking
Plafours	Transfers/drives
Raft Extreme	Rafting/Kayaking
Ross's Eco-lift	Gorge lift
Zambezi Elephant Trails	Elephant-back
United Air Charters	Helicopters
Victoria Falls River Safaris	Boating
Wild Side Tours	Guided tours
Wilderness Tours	Guided walks

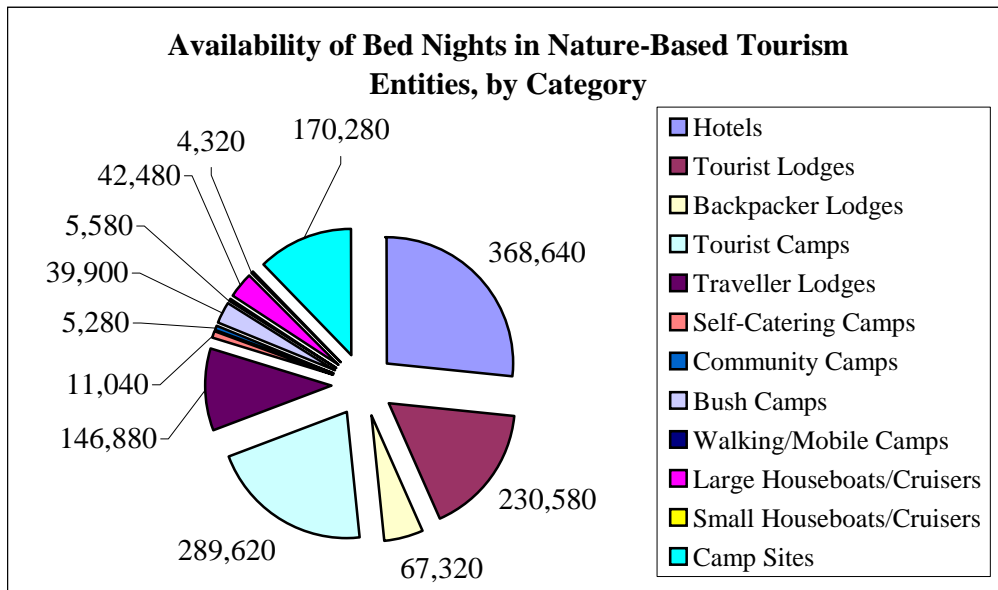
6.3.3 Bed Night Capacity

Bed night capacity has been measured according to length of the current operating season, not necessarily on a 12 month calendar (within the provisos established in section 3.3.1.3). Tables 5 and 6 earlier in the report indicate the available bed night capacities by accommodation category and region.

6.3.3.1 Bed Night Capacity by Category

Currently, there are approximately 1,382,000 bed nights available in nature-based tourism establishments country-wide. Hotels comprise 27% of this (368,640 bed nights), with tourist camps (21% and 289,620 bed nights) and tourist lodges (17% and 230,580 bed nights), the next largest contributors. Camp sites (12% and 170,280 bed nights) and traveller lodges (11% and 146,880 bed nights), are the other significant provider categories. Figure 8 demonstrates this bed night distribution by accommodation category.

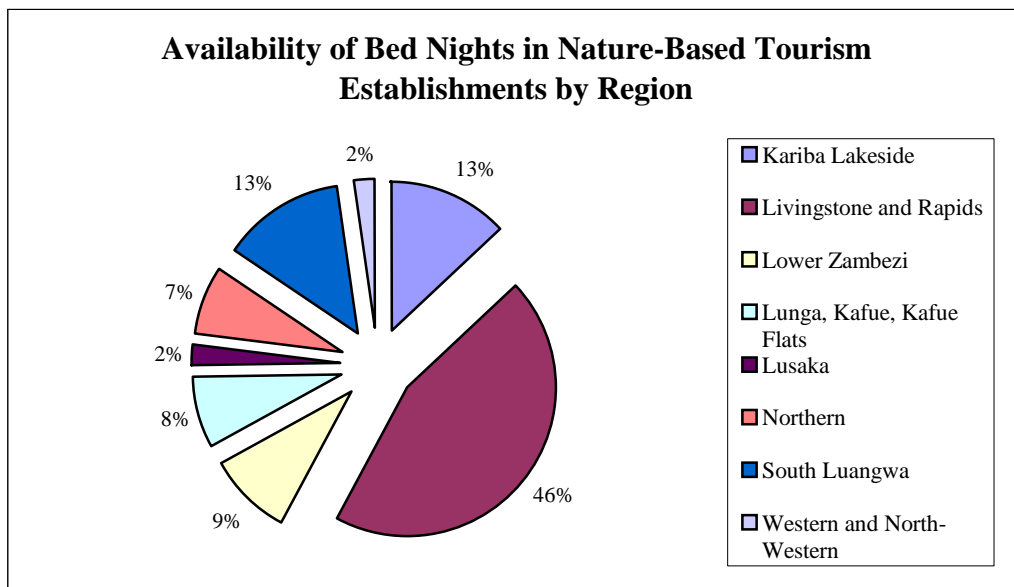
Figure 8 Total Bed Night Availability by Accommodation Category



6.3.3.2 Bed Night Capacity by Region

The Livingstone area provides 39% of all beds but 45% of all bed nights (610,680 bed nights) – indicating the high occupancy levels for all categories of accommodation. Figure 9 shows that by contrast, the traditional wildlife-based tourism areas in the South Luangwa, Lower Zambezi and Kafue contribute only 30% of all bed night capacity (403,860), and the Northern area and the Kariba lake shore 20% (276,600). The clear domination of the Livingstone area in bed night availability is evident.

Figure 9 Availability of Bed Nights in Nature-Based Tourism Establishments, by Region



6.3.4 Tourism Activity Capacity

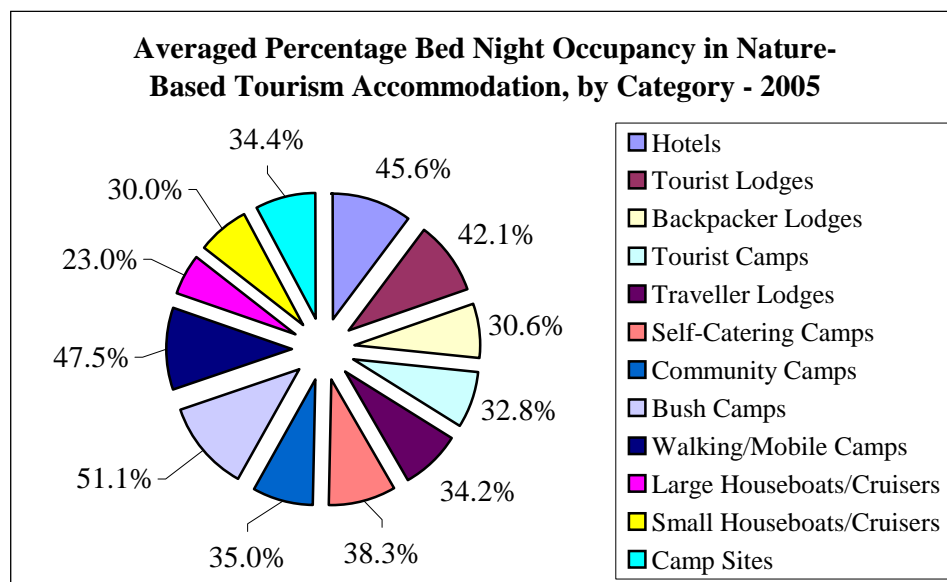
There were a small number of questionnaire responses from tourism activity providers, so establishing capacities is difficult. Table 7 lists estimated tourism activity capacities and utilisation levels for the Livingstone area only, built up from questionnaire responses and know data. As with the list of activity providers, some omissions and estimation errors may exist. The diversity of activity types is impressive, but undermines standard models for estimated capacity. Hopefully future surveys will be able to devote additional time to mapping this sub-sector more accurately.

6.3.5 Tourism Bed Night Occupancy

6.3.5.1 Bed Night Occupancy by Category

Because of the scarcity of responses to bed night occupancy data it was necessary in many cases to extrapolate from know data. The estimated average bed night occupancy is 37%, but category averages range from 23% to 51%, as shown in Figure 10. No accommodation category is noticeably different in overall bed night occupancy statistics, but houseboats and backpacker lodges (new entrants to the tourism market) have the lowest averages. Individual entities reported bed night occupancies varying widely from 6% to 80% - indicating both opportunities for increased efficiencies in the utilisation of existing installed bed capacity, and the fact that many establishments are new and getting established.

Figure 10 Bed Night Utilisation in Nature-Based Tourism Establishments, by Accommodation Category



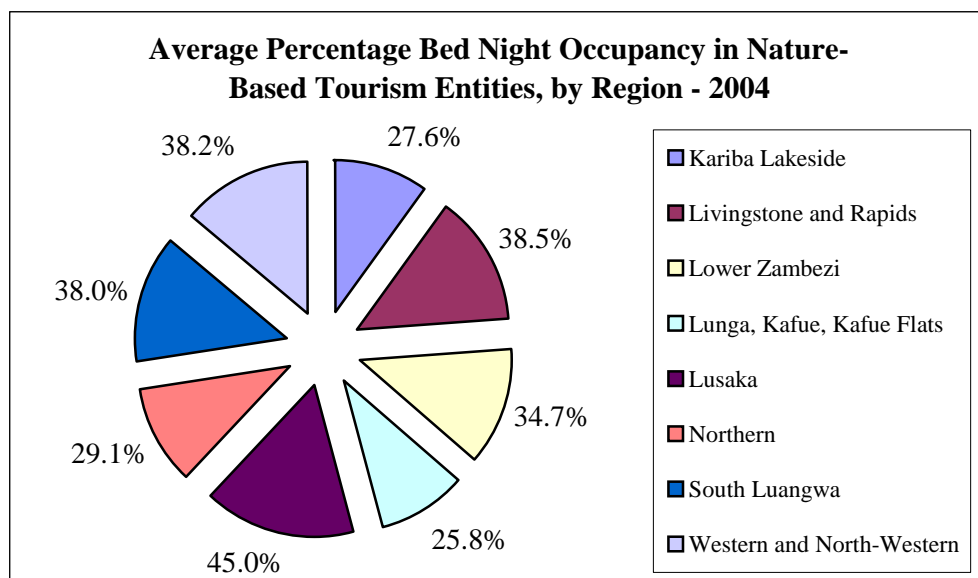
6.3.5.2 Bed Night Occupancy by Region

Bed night occupancies in this study are calculated against the actual period of operations. Many Zambian tourism operations are very seasonal, often being limited to a 5 month operating window between early June and late October. Thus average bed night occupancies under-represent potential utilisations if operating seasons could be extended. And for many seasonally inaccessible areas actual bed night occupancies

are overstated. Because of the dearth of reliable occupancy data these conclusions have a large degree of uncertainty and additional work is needed to establish realistic patterns of accommodation utilisation. As an example Kariba lake shore tourism is dominated by conference-oriented hotels in Siavonga, where occupancy rates would be expected to be high; yet the available reported data indicate that region has the second lowest occupancy levels among the main tourism destination regions in the country.

Figure 11 indicates that bed night utilisation by region is, nevertheless, very uniform, with variation around an average of 35% from 26% to 45%. As noted already, the Lunga, Kafue, Kafue Flats and Kariba lake shore areas have the lowest mean occupancies (26.3% and 27.6%, respectively).

Figure 11 Bed Night Utilisation in Nature-Based Tourism Establishments, by Region



The spread of total bed night utilisation levels indicates a similar pattern of contributions as bed night availability, but with the Livingstone and Lusaka areas having comparatively increased percentage contributions (49% and 5%, respectively), and other areas having marginally reduced utilisation rates.

6.3.6 Tourism Activity Utilisation

Some data exist from questionnaire responses for the level of utilisation of tourism activities, but even these data have not been verified. Nevertheless, Table 7 lists estimated capacities and utilisation levels from the Livingstone tourism activity providers. Present average utilisation levels would appear to be in the region of 35%, but this varies widely among the diverse range of activities.

**Table 7 Estimated Utilisation Levels for Tourism Activity Providers
– Livingstone Area**

No.	Company	Activity	No. Months Operating	Daily Person Capacity	Average Daily Utilisation Rate	Total Installed Annual Capacity	Total Capacity Utilisation
1	Abseil Africa	Rope activities	12	60	23.0%	21,900	4,400
2	African Extreme	Rafting/Kayaking	10	64	35.0%	19,200	6,720
3	Angle Zambia	Fishing	11	24	25.0%	7,920	1,980
4	Batoka Sky	Flying	12	16	65.0%	5,760	3,744
5	Batoka Sky	Horse Carriage	12	2	15.0%	720	108
6	Batoka Sky	Quad bikes	12	48	25.0%	17,280	4,320
7	Batoka Sky	Boat trips	12	100	35.0%	36,000	12,600
8	Birding with Bob	Birding	11	4	20.0%	1,320	264
9	Bundu	Rafting/Kayaking	10	36	35.0%	10,800	3,780
10	Bushtracks Africa	Transfers/drives	12	900	50.0%	324,000	162,000
11	Bushtracks Africa	Bush dinners	12	6	20.0%	2,160	432
12	Bwaato Adventures	Rafting/Kayaking	10	64	35.0%	19,200	6,720
13	Cholwe Adventures	Rafting/Kayaking	10	64	35.0%	19,200	6,720
14	Gwembe Crocodile Farm	Crocodile farm	12	100	35.0%	36,000	12,600
15	Jet Extreme	Jet boating	10	12	0.0%	3,600	0
16	Kayak School	Kayaking	11	20	35.0%	6,600	2,310
17	Livingstone Walking Safari	Walking safaris	12	12	40.0%	4,320	1,728
18	Local Cowboy Tours	Guided bike tours	12	24	35.0%	8,640	3,024
19	Makora Quest	Rafting/Kayaking	11	20	35.0%	6,600	2,310
20	Plafours	Transfers/drives	12	120	35.0%	43,200	15,120
21	Raft Extreme	Rafting/Kayaking	10	96	26.6%	30,660	8,152
22	Ross's Eco-lift	Gorge lift	10	120	35.0%	36,000	12,600
23	Safari Par Excellence	Elephant-back	12	27	83.7%	10,182	8,522
24	United Air Charters	Helicopters	12	48	50.0%	17,280	8,640
25	Victoria Falls River Safaris	Boating	12	36	35.0%	12,960	4,536
26	Wild Side Tours	Guided tours	12	24	40.0%	8,640	3,456
27	Wilderness Tours	Guided walks	12	12	40.0%	4,320	1,728
	Sub-totals		306	2,059	943.3%	714,462	298,514
	Averages		11	76	34.9%	26,462	11,056

6.4 Operating Season

While most urban tourism operations operate over a full 12 month period, many more remote field operations are limited to as little as 5 months because of accessibility difficulties during the wet months.

Tables 4 and 5 above indicate these variations clearly with a national average of around 10 months, but regional averages ranging from 7 months in the South Luangwa, to 8 months in the Lower Zambezi and 9 months in Western Zambia. Data for the Lunga-Kafue basin is skewed upwards by the limited number of tourism operations functioning in 2005. The accommodation categories with the lowest operating seasons (self-catering, community, bush and walking camps), are also mostly located in those regions with the biggest accessibility problems/shortest

operating seasons: Lower Zambezi, South Luangwa, Lunga, Kafue , Kafue Flats, and the Western and North-Western region.

In an overall sense, increasing utilisation to a 12 month season would provide close to an additional 45,000 bed nights, or 9 % of total national nature-based tourism bed nights – on the basis of existing operations and occupancy levels. As many seasonally inaccessible areas have not been developed, this potential of obviously even larger.

6.5 Turnover

The total turnover of all nature-based tourism accommodation providers is estimated at US\$ 76.4 million. An accurate estimation is difficult because very few respondents submitted details.

Nevertheless, rack rate (agency bed night) rates are similar for similar types of accommodation and these figures, together with questionnaire responses, were used to built up a national picture (making provision for discounts for marketing and reduced bed night rates).

6.5.1 Total Turnover Contribution by Nature-Based Tourism Accommodation Providers, by Region

Using this approach (and checking again against responses that were received), the estimated, rounded contribution of the various categories of accommodation was developed and is shown in Table 8.

Table 8 Actual Turnover Contribution of Nature-Based Accommodation Tourism Providers (million US\$), by Category

Category	Turnover (million US\$)	%age of National Turnover
Hotels	25.05	32.8%
Tourist Lodges	22.48	29.4%
Backpacker Lodges	1.75	2.3%
Tourist Camps	16.68	21.8%
Traveller Lodges	2.83	3.7%
Self-Catering Camps	0.13	0.2%
Community Camps	0.10	0.1%
Bush Camps	4.42	5.8%
Walking/Mobile Camps	0.66	0.9%
Large Houseboats/Cruisers	0.98	1.3%
Small Houseboats/Cruisers	0.08	0.1%
Camp Sites	1.24	1.6%
Totals	76.40	
Averages per Category	6.37	

Figure 12 illustrates these contributions by accommodation category. It should be noted that these data do not include nature-base tourism activity providers, which are discussed next. The disproportionately high contribution of the hotel category, compared to that category’s numerical standing, is largely influenced by the high cost/high volume operations of the Sun Group in the prime Livingstone area.

The turnover contribution per bed night is highest for tourist lodges and camps, bush camps and walking/mobile safari operations (on average, in the region of US\$ 200 to 270 per bed night) – as one might expect given their low economies of scale and high operating costs (see Figure 13).

Figure 12 Total Turnover Contribution by Nature-Based Tourism Accommodation Providers, by Accommodation Category

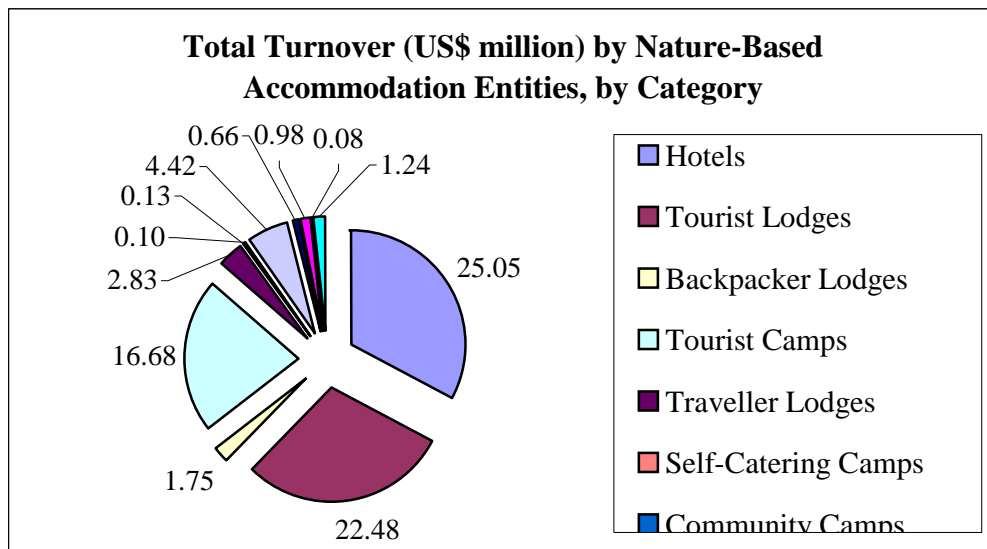
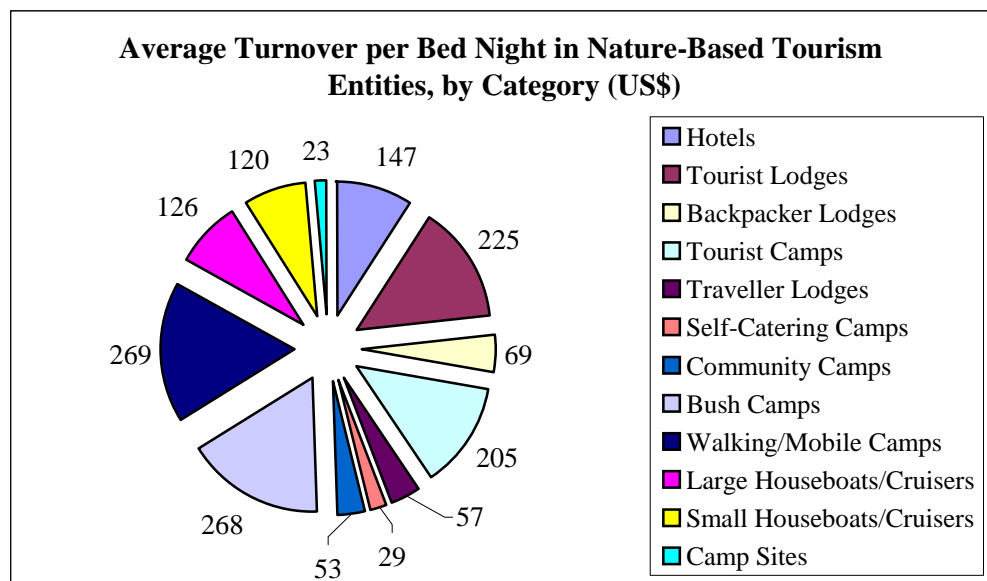


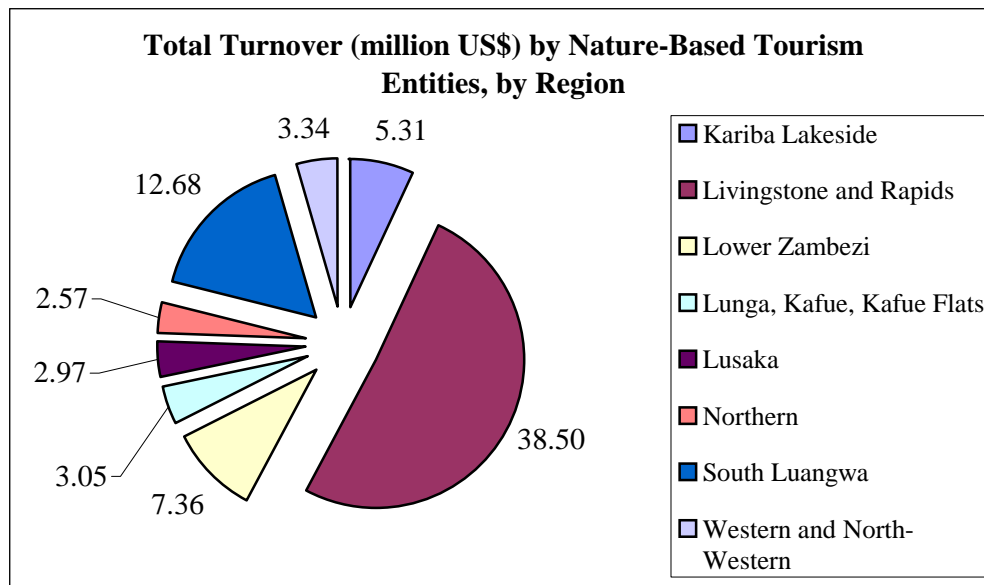
Figure 13 Average Turnover per Bed Night in Nature-Based Tourism Accommodation Providers, by Accommodation Category



6.5.2 Turnover Contribution by Region

The regional turnover contribution is dominated by the Livingstone area (51%, with an estimated US\$ 38 million) – also as one might expect with its huge preponderance of bed night capacity and utilisation – see Figure 14.

Figure 14 Total Turnover Contribution by Nature-Based Tourism Accommodation Providers, by Region



The other two principal regions contributing to tourism turnover: the Lower Zambezi (9.7% and US\$ 7.4 million) and South Luangwa (16.7% and US\$ 12.7 million) continue to do so, but other areas, including western Zambia each now contribute in excess of 3% of all nature-based tourism turnover.

6.5.3 Turnover Contribution by Tourism Activity Providers

Although many top-end operators incorporate all activity costs in their bed night rates, most lower cost operators and some high cost operators do charge for additional services such as river and road transfers, boat trips, fishing and canoeing, game drives and guided walks and so on. We have attempted to capture this information as a supplement to the contribution of known tourism activity providers in the Livingstone area. Once again the paucity of responses has forced an extrapolation approach, built up from basic principles and data. We acknowledge that there may be significant levels of error in this first round of information capture. Table 9 portrays the outcome of these calculations (which were also cross-checked against responding questionnaires). It is stressed that at this stage these are rough estimates.

Given those provisos, the Livingstone area provides over 76% of the estimated turnover of US\$ 15.5 million. If correct, this sum is significant. It represents 20% of the estimated total turnover of the all accommodation providers, and the Livingstone region total of US\$ 11.6 million is equivalent to 30% of the total estimated turnover

of all Livingstone region accommodation providers. In other words the outsourced tourism activities are absorbing 30% of the tourism turnover market.

Table 9 Estimated National Turnover Contribution from Nature-Based Tourism Activity Providers

Region	No. Months Operating	Daily Person Capacity	Average Daily Utilisation Rate	Total Installed Annual Capacity	Total Capacity Utilisation	Estimated Turnover (million US\$)
Kariba Lakeside	12	133	17.2%	5,147	7,620	0.26
Livingstone and Rapids	11	2,059	34.9%	26,462	298,514	11.60
Lower Zambezi	9	264	25.0%	4,335	17,340	1.56
Lunga, Kafue, Kafue Flats	10	180	21.4%	7,457	11,376	1.02
Lusaka	12	126	25.0%	15,120	11,340	0.28
Northern	12	44	11.0%	3,168	1,980	0.07
South Luangwa	11	120	35.0%	19,800	13,860	0.35
Western and North-Western	0	0	0.0%	0	0	0.00
Totals	743	2,926	1848.3%	983,142	362,030	15.15
Averages per region	11	42	26.8%	14,248	5,247	0.22

Clearly tourism activity provision is meeting market needs and represents an area warranting further study, firstly to confirm the quantum of the preliminary turnover calculations, and secondly to assess the opportunities for diversifying and disseminating activity products in appropriate ways.

The tourism activity provider assessment did not include the consumptive tourism sector (hunting and game ranching), nor the curio trade - or government operated museums and heritage sites.

6.6 Profitability

The tourism supply-side questionnaire included questions on turnover, capital investment and profitability. Only 15 respondents provided profit information. The reported mean profitability before tax (PBT) of these entities (including the Sun Group which reported a large loss) was -US\$ 235,111. Excluding the Sun Group accounts produces a mean profitability of US\$ 76,318. Assuming a company tax rate of 35%, this would contribute a profit after tax (PAT) of around US\$ 50,000, or 9.7% of the average reported turnover of the responding companies (of US\$ 513,000).

If one excludes other loss-making entities (on the assumption that losses are the result of recent capitalisation, or bad management), then the net mean profit before tax is US\$ 93,000, yielding a mean profit before tax of 11.5% and a profit after tax of 7.5%. Neither of these statistics would be regarded as very satisfactory in a business plan.

A sample of 15 respondents from a total of approximately 230 nature-based accommodation providers is scarcely representative. But there were returns in the sample from most regions, and the core of respondents came from established hotels,

tourism lodges and camps in the Lower Zambezi, Lusaka and South Luangwa areas. Further work is required to establish reasons for the reported low profitability. A number of suggestions have been made, including: the high real cost of labour; limited application of economies of scale; and large distance-related supply costs, but to date little strenuous analysis has been attempted to isolate key factors.

What is clear is that under the conditions in which most present tourism establishments developed, high profitability has not been a general outcome. If these conditions can be verified, there is need for a strategic examination of obstacles to profitability if viable and sincere tourism sector investments are to be retained and new ones attracted. A comparison of tourism entity profitability in the region would be a useful adjunct to that examination.

6.7 Employment

Responses from the operator questionnaire and extrapolation from other sources of information suggests that nature-based tourism employs in the region of 3,700 permanent employees. Most operators also reported the employment of a significant number of temporary, or seasonally-employed staff, often in excess of 10% of the permanent work force.

The 2000 Census of Population and Housing did not enumerate the number of people employed in the tourism sector (probably be included in the “trade” category. Data for the “trade” category in 2000 lists a “usually working population” of 45,189. Nature-based tourism then represents 8% of this category of employment and 0.07% of the total number of reported employees in 2000 of 513,512.³

At first glance tourism would not appear to be a significant employer in the national arena.

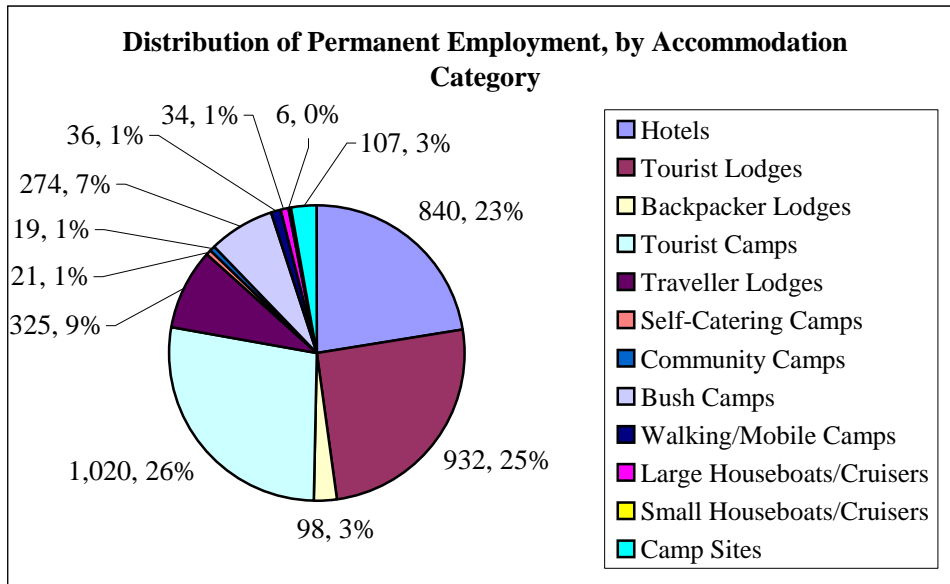
If direct temporary employees are included at an average rate of 10%, then the total number of people employment in nature-based tourism would increase to nearly 4,100, or 9% of the “trade” work force. What is less easy to establish is the number of people employed “around” the tourism sector, particularly as contractors and/or permanent suppliers of one sort or another.

6.7.1 Nature-Based Tourism Employment by Infrastructure Category

Figure 15 portrays the distribution of permanent employment by category of accommodation provider. The distribution of employment largely mirrors the availability of nature-based tourism bed capacity in the different categories. The largest employers are the tourist camps and lodges (1,020 and 26%, and 932 and 25%, respectively), followed by nature-based tourism hotels (840 and 23%). Traveller Lodges and Bush Camps both employ around 300.

³ Zambia Analytical Report, Volume 10, 2000 Census of Population and Housing, Central Statistical Office, 2003.

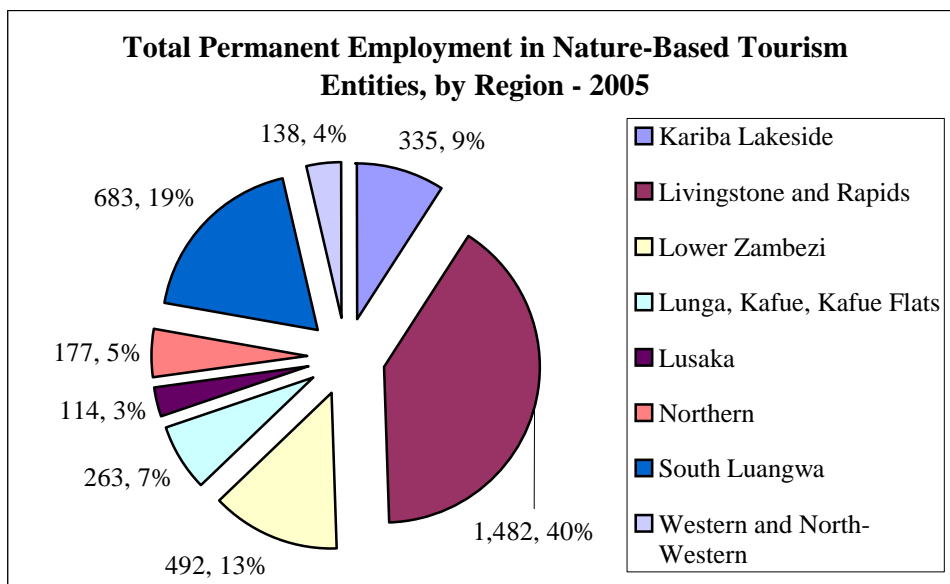
Figure 15 National Distribution of Nature-Based Tourism Employment, by Accommodation Category



6.7.2 Nature-Based Tourism Employment by Region

A similar pattern of employment mirroring bed availability is exhibited under a regional analysis. Figure 16 illustrates the outcome of this assessment. The Livingstone area supports the largest number of employees (1,482 and 40% of all nature-based tourism employment).

Figure 16 National Distribution of Nature-Based Tourism Employment, by Region



The South Luangwa and Lower Zambezi valley areas employ a further 32% (1,175) of the total. Overall, more than 2,000 (or 56.7%), of these employees are located in rural locations, and therefore provides a useful salient in rural poverty reduction strategies.

6.7.3 Employment by Tourism Activity Providers

The calculations above did not include employment by tourism activity providers. In many cases employees working on activity provision are listed in the staff schedules of tourism accommodation providers. But where it has been clear that the activity provider is independent the additional employment has been tabulated. As with other aspects of the analysis of nature-tourism-linked activity provision, there are numerous areas of uncertainty. Nevertheless, Table 10 provides estimates on additional permanent employment offered by tourism activity provision. Regions with zero estimated activity employment are those where employment is considered to be inclusive in that provided by accommodation providers. There may be some omissions in this area, particularly in the Lake Tanganyika and South Luangwa areas.

Table 10 The Distribution of Employment in Nature-Based Tourism Activity Providers, by Region

Region	Permanent Employees
Kariba Lakeside	16
Livingstone and Rapids	535
Lower Zambezi	0
Lunga, Kafue, Kafue Flats	0
Lusaka	24
Northern	0
South Luangwa	0
Western and North-Western	0
Totals	575
Averages per region	8

Accumulating permanent and temporary employment by nature-based tourism accommodation providers, with that offered by tourism activity providers produces a total employment level of 4,658.

7. Trends

Table 1 and Figure 1 illustrate the growth in tourism arrivals (a major, but not the only indicator of tourism growth) to Zambia and in the region. Trends at a local level are less well documented and only limited information is available for Livingstone (1996) and Livingstone, the Lower Zambezi and South Luangwa (2003). That material is shown in Table 11 and presents some contradictory results.

7.1 Trends in the Regions

Table 11 Trends in Some Regional, Nature-Based Tourism Indicators, 2003 – 2005

	Livingstone		Lower Zambezi		South Luangwa	
	2003	2005	2003	2005	2003	2005
Beds Nights Available	1,186,250	610,680	58,200	119,940	65,986	181,380
Bed Nights Recorded	593,125	247,822	15,015	43,518	27,565	71,790
Occupancy Level	50.00%	38.46%	25.80%	34.68%	41.77%	38.0%
Employment	1,803	2,017	435	492	504	683
Annual Turnover	\$30,000,000	\$50,105,357	\$2,172,000	\$8,917,360	\$3,600,000	\$13,022,935

What is clear from this collection of data is that additional in-depth work is needed to a) clarify the statistical base and b) clarify the definition of accommodation types. The number of beds in the Livingstone area in 2003 were estimated to be 3,261. The data from the current questionnaire from 2005 indicates a figure of 1,704. Clearly there has been significant under-reporting (it is acknowledged that the 2005 figure have under-reporting – estimated at around 20%), or the 2003 figure is a significant over-estimate.

The 2005 bed availability figure did not capture all guest houses (and therefore may have omitted around 80 beds) and also excluded what are termed hostels in the 2003 reporting (which might add a further 60 to 80 beds). Finally, a number of camping bed nights are likely to have been overlooked where backpacker lodges and the like offer occasional camping capacity. This might contribute a further 80 bed sites. Adding these possible omissions to the existing 2005 total would produce an overall bed availability figure for Livingstone of around 2,000 –still well short of the 2003 figure.

Data for the Lower Zambezi and South Luangwa areas is equally anomalous in the opposite direction, with bed availability and occupancy figures two to three times higher than the 2003 assessment. In the case of the South Luangwa, additional beds have become available and several operators have extended their seasons. This can significantly shift the bed night availability figures (for example an additional operation can produce approximately 5,000 bed nights and two additional months at a 20 bed lodge will produce an additional 1,200 bed nights). However, the margins of difference are so great not to be accountable from these increases. Examination of data from 2003 indicates that under-reporting is the primary source of these discrepancies, but the 2005 data are likely to be close to actuals. The turnover per bed night figures that derive from the 2005 analysis are much closer to actual bed night rates, which would also support this thesis of under-reporting in 2003.

On the assumption that the 2003 data are over-estimated for the Livingstone area and under-reported in the Lower Zambezi and South Luangwa areas little useful information can be derived on trends. Nevertheless, examining the reported total turnover and employment figures would suggest that a significant growth has occurred (20% on employment).

8 Conclusions

Three concluding observations emerge after evaluating the characteristics of nature-based tourism accommodation and activity providers:

- i) there is still insufficient accurate information available to support useful tourism planning work, and the evolution of a realistic national tourism strategy. Further work is needed on the regular collection of basic tourism information and on building up workable databases;
- ii) the available data reinforce the perceived view that the evolution of Zambia's tourism sector is driven by an uncoordinated mixture of: committed, small- to medium-scale ventures that are commonly characterised by an absence of a long-term business plan; an element of short-term opportunism in niche ventures; and a more recent injection of well-planned, but low-risk, large-scale, long-term investments. The varying proportions of accommodation categories in the different regions bear this out;
- iii) as outcomes of i) and ii) above, there is no visible existing strategy for building a balanced mass of tourist flows in the various regions, or for encouraging the infrastructure necessary to support it (particularly in the airline sector, and particularly for Zambia's north-eastern circuit);
- iv) another outcome of i) and ii) is that outside the Livingstone region there are few examples of the development of the hierarchically structured operations that have the capacity to support the efficient absorption of tourists and their subsequent distribution within local, national and international circuits. This directly impacts on Zambia's ability to create critical mass in tourist flows and to take advantage of attendant scale economies.

Annex 1 Tourism Operator Questionnaire

Annex 2 Tourism Agent Questionnaire

Annex 3 Proposed Preliminary Classification of Nature-Based Tourism Accommodation Providers

	Type of Structure	Number of Beds	Client Group	Minimum Services
Large Capacity				
Hotel	Permanent	> 39	Variable	Accommodation, food and beverage, client services
Medium Capacity				
Backpacker Lodge	Permanent	Unlimited	Backpacker clients	Accommodation
Tourist Lodge	Permanent	> 16	Tourism clients	Accommodation, food and beverage, client services, activities
Tourist Camp	Permanent	> 7 < 17	Tourism clients	Accommodation, food and beverage, client services, activities
Traveller Lodge	Permanent	> 8	Variable	Accommodation, client services, food on request
Self-catering Camp	Permanent	> 7 < 40	Tourism clients	Accommodation, cooking facilities
Small capacity				
Bed and Breakfast	Permanent	< 9	Variable	Accommodation, breakfast
Community Camp	Permanent or semi-permanent	< 17	Cultural safari client	Bush accommodation, cooking facilities, client services
Bush Camp	Seasonal structure	< 9	Tourism clients	Bush accommodation, food and beverage, activities, client services, activities
Walking/ Mobile Camp	Temporary structure	<7	Walking safari clients	Tented accommodation, food and beverage, activities, client services, activities

Other				
Large Houseboat/Cruiser	Permanent	> 10	Variable	Accommodation, food and beverage, client services
Small Houseboat/Cruiser	Permanent	< 11	Variable	Accommodation, food and beverage, client services
Camp Site	Ablution structures only	None – only camping space	Camping clients	Camping space, ablution facilities

Annex 4 Proposed Preliminary Classification of Nature-Based Tourism Activity Providers

Activity category	Activity Type	Client Group	Minimum Services
Water-based	Kayaking	Small groups	Kayak, supervisor, supervisor certificate, safety and first aid equipment, support staff
	Canoeing	Small groups	Canoe, supervisor, supervisor certificate, safety and first aid equipment, support staff
	Rafting	Small groups, including groups of groups	Raft, raft master, raft and raft master certificates, safety and first aid equipment, food and beverage and support staff,
	Boating	Small groups	Boat, boat master, boat and boat master certificates, safety and first aid equipment, and support staff
	Jet Boating	Small groups	Boat, boat master, boat and boat master certificates, safety and first aid equipment
	Fishing Boat	Small groups	Boat, boat master, boat and boat master certificates, safety and first aid equipment, fishing equipment
	Scuba/ Snorkel Diving	Small groups	Boat, boat/diving master, diving master, diving, compressor and equipment certificates, scuba/snorkel equipment including safety and first aid equipment and support staff
	Off-Shore Sailing	Small groups	Sailing boat, supervisor, equipment and sailing certificates, radio, safety and first aid equipment
	Dinghy Sailing	Singles or small groups	Sailing boat, supervisor, safety and first aid equipment, support staff

Rope-based	Bunji Jumping	Singles	Bunji equipment, supervisor, supervisor and equipment certificate, safety and first aid equipment, support staff
	Abseiling	Singles	Ropes, supervisor, supervisor and equipment certificates, safety and first aid equipment, support staff
	Other rope and wire-based activities	Singles	Ropes/wires, supervisor, equipment and supervisor certificates, safety and first aid equipment, support staff
Aircraft-based	Micro light flights	Singles	Aircraft, commercial pilot, aircraft, airfield and pilot certificates, safety equipment, support staff
	Fixed-wing aircraft flights (including float planes)	Singles or small groups	Aircraft, commercial pilot, aircraft, airfield and pilot certificates, safety and first aid equipment, support staff
	Parachuting	Singles or small groups	Aircraft, commercial pilot, parachute instructor/guide, parachute, safety and first aid equipment, support staff
	Gliding	Singles	Glider, flying instructor, launch equipment, airfield, equipment, glider and instructor certificates, safety and first aid equipment, support staff
	Paragliding (including power Para gliders)	Singles	Para glider, instructor, para glider and instructor certificates, safety and first aid equipment, support staff
Horse-based	Horse riding (hacking)	Singles or small groups	Riding instructor, or group leader, vet-certified horses, riding equipment, safety hats, first aid equipment
	Wildlife	Singles or small	Riding instructor, or

	rides	groups	group leader, vet-certified horses, riding equipment, safety hats, first aid equipment, armed, mounted Wildlife Police Officer, support staff
	Horse and carriage	Singles, doubles, or small groups	Qualified driver, horse(s), certified carriage
Vehicle based	Game drives	Small groups	Qualified tourism guide, licensed vehicle, first aid equipment, fire extinguisher
	Transfers	Small groups	Qualified driver/host(ess), licensed bus, first aid equipment, fire extinguisher
	Quad bikes	Singles or doubles	Qualified instructor/supervisor/tourism guide, licensed quad bikes, safety hats, first aid equipment
	Motor-bikes and scooters	Singles or doubles	Qualified instructor/supervisor/tourism guide, licensed bikes, safety hats, first aid equipment
	Bicycles	Singles or doubles	Qualified supervisor/tourism guide, bicycles, safety hats, first aid equipment
Pedestrian	Wildlife walks	Singles or small groups (< 7)	Qualified tourism guide, armed Wildlife Police Officer, first aid equipment
	Wilderness walks	Singles or small groups (<10)	Qualified tourism guide(optional), or supervisor, maps, first aid equipment

Annex 5 Details of Nature-Based Tourism Accommodation Providers

Hotels

No.	Category	Region	Company	Operating Name
	Hotels	> 39 beds, permanent structure, all clients services - business and transit focus		
1	(Beds)	Kariba Lakeside	Garden House Hotels	Leasure Bay Lodge
2		Kariba Lakeside	Lake Kariba Inns	Lake Kariba Inns
3		Kariba Lakeside	Lake Safari	Lake Safari Lodge
4	225	Kariba Lakeside	Manchinchi Bay	Manchinchi Bay Lodge
5		Livingstone and the Rapids	?	New Fairmount
6		Livingstone and the Rapids	?	Ngolide Lodge
7		Livingstone and the Rapids	?	Tunya Lodge
8		Livingstone and the Rapids	?	Wasawange Lodge
9		Livingstone and the Rapids	?	Royal Mushili
10		Livingstone and the Rapids	Sun International	Royal Livingstone
11	711	Livingstone and the Rapids	Sun International	Zambezi Sun
12	88	Lusaka	Protea Group	Protea Chisamba Lodge
Sub-total				
Averages				

Tourist Lodges

	Tourist Lodges	> 16 beds, permanent structure, all client services - tourism activity focus		
1		Livingstone and the Rapids	?	Maramba River Lodge
2		Livingstone and the Rapids	?	Nyala Lodge
3		Livingstone and the Rapids	?	Zambezi Royal Chundu Lodge
4		Livingstone and the Rapids	?	Royal Mukuni Lodge
5		Livingstone and the Rapids	River Club	River Club Lodge
6		Livingstone and the Rapids	Safari Par Excellence	Thorn tree Lodge
7		Livingstone and the Rapids	Safari Par Excellence	Waterfront
8		Livingstone and the Rapids	Stanley Exploration & Safari	Stanley Safari Lodge
9		Livingstone and the Rapids	Star of Africa	Sussi and Chuma Lodge
10	282	Livingstone and the Rapids	Tongabezi	Tongabezi Lodge
11		Lower Zambezi	?	Bridge Camp
12	48	Lower Zambezi	J. Zwiendelaar	Mvuu Lodge
13		Lunga, Kafue, Kafue Flats	Lufupa	Lufupa Lodge
14		Lunga, Kafue, Kafue Flats	Mukambi	Mukambi Lodge
15		Lunga, Kafue, Kafue Flats	Musungwa Safaris	Musungwa Lodge
16	90	Lunga, Kafue, Kafue Flats	None	Ngoma Lodge
17		Lusaka	Chaminuka	Chanminuka Lodge
18	60	Lusaka	Lilayi Holdings	Lilayi Lodge
19		Northern - Lake Tanganyika	?	Ndole Bay Lodge
20		Northern - Lake Tanganyika	?	Nkamba Bay Lodge
21		Northern - Lundazi	?	Lundazi Castle
22		Northern - Mpika	Shiwa Safaris	Shiwa House
23	78	Northern - Lake Tanganyika	Tourism International	Kasaba Bay Lodge

Tourist Lodges (Cont'd.)

24		South Luangwa	Flatdogs Company	Flatdogs Camp	
25		South Luangwa	Kafunta	Kafunta River Lodge	
26		South Luangwa	Lion	Lion Camp	
27		South Luangwa	Lupande Safaris	Wildlife Camp	
28		South Luangwa	Marula	Marula Camp	
29		South Luangwa	Mfuwe	Mfuwe Lodge	
30		South Luangwa	Norman Carr's Safaris	Kapani Lodge	
31		South Luangwa	Robin Pope Safaris	Nkwali Camp	
32	202	South Luangwa	Star of Africa	Chichele Lodge	
Sub-total					
Averages					
	Backpacker Lodges	Unlimited beds, permanent structure, accommodation and some client services - backpacker focus			
1		Kariba Lakeside	?	Eagles Rest Chalets	
2	52	Kariba Lakeside	?	Sinazongwe Backpackers	
3		Livingstone and the Rapids	?	Faulty Towers	
4		Livingstone and the Rapids	?	Jolly Boys	
5	123	Livingstone and the Rapids	?	Zigzag	
6	16	South Luangwa	?	Adorata	
Sub-total					
Averages					

Tourist Camps

	Tourist Camps	> 7 < 17 beds, permanent structure, all client services - tourist activity focus		
1		Kariba Lakeside	?	Sandy Beach Camp
2		Kariba Lakeside	?	Massimo's
3		Kariba Lakeside	?	Zefa Lodge
4		Kariba Lakeside	Chete Island Safaris	Chete Island Camp
5		Kariba Lakeside	Dubler	Lottery Bay Camp
6	58	Kariba Lakeside	Sobek Adventures	Tamarind Camp
7		Livingstone and the Rapids	?	Chundukwa Camp
8		Livingstone and the Rapids	?	Islands of Siankaba Camp
9		Livingstone and the Rapids	?	Livingstone Safaris Lodge
10		Livingstone and the Rapids	?	Natural Mystic Lodge
11	76	Livingstone and the Rapids	?	Taita Falcon Lodge
12		Lower Zambezi	?	Ana Tree Camp
13		Lower Zambezi	?	Dombuyamoyo Camp
14		Lower Zambezi	?	Galamuka Camp
15		Lower Zambezi	?	Kingfisher Camp
16		Lower Zambezi	?	Makango Camp
17		Lower Zambezi	?	Msaku Mbezi Camp
18		Lower Zambezi	?	Mtondo Camp
19		Lower Zambezi	?	Red Cliff Lodge
20		Lower Zambezi	Chifungulu	Sausage Tree Camp
21		Lower Zambezi	Chongwe River Safaris	Chongwe River Camp
22		Lower Zambezi	Chongwe River Safaris	Gwabi Lodge
23		Lower Zambezi	Eastern Safaris	Mushika Camp
24		Lower Zambezi	G&G Safaris	Chiawa Camp

Tourist Camp (Con't.)

25		Lower Zambezi	Gerrardi Milling	Wildtracks Camp
26		Lower Zambezi	Isle & Blythe	Nyati Camp
27		Lower Zambezi	Isle & Blythe	Shafumbi Camp
28		Lower Zambezi	Kafue Boat Tours	Chilapira Camp
29		Lower Zambezi	Kanyemba	Kanyemba Lodge
30		Lower Zambezi	Karibu Safaris	Kiambi Lodge
31		Lower Zambezi	Karibu Safaris	Kiubu Camp
32		Lower Zambezi	Lion Roars	Mwambashi camp
33		Lower Zambezi	Lion Roars	Royal Zambezi Lodge
34		Lower Zambezi	Nyamangwe Safaris	Kasaka Camp
35		Lower Zambezi	Safari Par Excellence	Kayila Lodge
36		Lower Zambezi	Star of Africa	Kulefu Camp
37	366	Lower Zambezi	Trishal Investments	Trishuls Camp
38		Lunga, Kafue, Kafue Flats	?	Chunga Camp
39		Lunga, Kafue, Kafue Flats	?	Hippo Camp
40		Lunga, Kafue, Kafue Flats	?	Kaingu Camp
41		Lunga, Kafue, Kafue Flats	?	McBride's Camp
42		Lunga, Kafue, Kafue Flats	?	Musuku Lodge
43		Lunga, Kafue, Kafue Flats	?	New Kalala
44		Lunga, Kafue, Kafue Flats	?	Puku Pans
45		Lunga, Kafue, Kafue Flats	Kafue Fisheries	Lechwe Lodge
46		Lunga, Kafue, Kafue Flats	Lufupa	Kawfwala Rapids Camp
47		Lunga, Kafue, Kafue Flats	Mukambi	Mukambi Camp
48		Lunga, Kafue, Kafue Flats	Star of Africa	Lechwe Plains

Tourist Camp (Cont'd.)

49		Lunga, Kafue, Kafue Flats	Tully Ho Safaris	Blue Lagoon Farmhouse	
50		Lunga, Kafue, Kafue Flats	Tully Ho Safaris	Blue Lagoon New Site	
51		Lunga, Kafue, Kafue Flats	Wilderness Safaris	Lunga Cabins	
52		Lunga, Kafue, Kafue Flats	Wilderness Safaris	Moshi Camp	
53	196	Lunga, Kafue, Kafue Flats	Wilderness Safaris	Ntemwa Camp	
54		Northern - Kasanka	Kasanka Trust	Luombo Camp	
55		Northern - Kasanka	Kasanka Trust	Wasa Camp	
56		Northern - Lake Tanganyika	?	Isanga Bay Lodge	
57		Northern - Lake Tanganyika	?	Kasakalabwe Lodge	
58		Northern - Lake Tanganyika	?	Nkupi Lodge	
59		Northern - Lake Tanganyika	?	River Valley Tropicals Camp	
60		Northern - Lake Tanganyika	?	Tanganyika Lodge	
61		Northern - Lake Tanganyika	?	The Beach	
62		Northern - Lusiwasi	Kaumba	Kaumba Camp	
63		Northern - Mpika	?	Kapishya Hot Springs	
64		Northern - Mpika	?	Mutinondo Camp	
65	141	Northern - Mpika	?	Mutinondo Field Camp	
66		South Luangwa	?	Chipembe	
67		South Luangwa	?	Lukonde	
68		South Luangwa	?	Mataka Lodge	
69		South Luangwa	?	Tundwe	
70		South Luangwa	?	Luambe Camp	
71		South Luangwa	?	Luangwa River Safari	
72		South Luangwa	Bush Camp Company	Kapamba	

Tourist Camp (Cont'd.)

73		South Luangwa	Luamfwa Safaris	Luamfwa Lodge	
74		South Luangwa	Norman Carr's Safaris	Chinzombo House	
75		South Luangwa	Remote Africa	Tafika	
76		South Luangwa	Robin Pope Safaris	Nsefu	
77		South Luangwa	Shenton Safaris	Kaingu	
78	150	South Luangwa	Star of Africa	Puku Ridge	
79		Western and North-Western	Kabula Tiger Lodge	Kabula Lodge	
80		Western and North-Western	Royal Barotse Safaris	Maziba Bay Lodge	
81		Western and North-Western	Royal Barotse Safaris	Mutemwa Lodge	
82	56	Western and North-Western	Zabelozi	Zabelozi Lodge	
Sub-total					
Averages					

Traveller Lodges

	Traveller Lodges	> 8 beds, permanent structure, some client services - business and family traveller focus		
1	18	Kariba Lakeside	?	Sinazongwe Guesthouse
2		Livingstone and the Rapids	?	Chanters Guesthouse
3		Livingstone and the Rapids	?	Chapa Classic Guesthouse
4		Livingstone and the Rapids	?	Farai Guesthouse
5		Livingstone and the Rapids	?	Jungle Junction
6		Livingstone and the Rapids	?	Kaazmein Guesthouse
7		Livingstone and the Rapids	?	Kays Guesthouse
8		Livingstone and the Rapids	?	Likute Guesthouse
9		Livingstone and the Rapids	?	Limbo Guesthouse
10		Livingstone and the Rapids	?	Little Paradise Guesthouse
11		Livingstone and the Rapids	?	Moloke Guesthouse
12		Livingstone and the Rapids	?	Namels Guesthouse
13		Livingstone and the Rapids	?	Nkhwazi Guesthouse
14		Livingstone and the Rapids	?	No Name Guesthouse
15		Livingstone and the Rapids	?	Rite Inn Guesthouse
16		Livingstone and the Rapids	?	Roysam Guesthouse
17		Livingstone and the Rapids	?	Savannah Guesthouse
18		Livingstone and the Rapids	?	Simac Guesthouse
19		Livingstone and the Rapids	?	Southern Comfort Guesthouse
20		Livingstone and the Rapids	?	Stone Guest Lodge Guesthouse
21		Livingstone and the Rapids	?	Wane Guesthouse
22		Livingstone and the Rapids	?	White Water Guesthouse
23		Livingstone and the Rapids	?	Woodlands Guesthouse
24	374	Livingstone and the Rapids	?	Zambezi Ultima Guesthouse
25	16	Northern - Kasama		Kasama Hotel
Sub-total				
Averages				

Self-Catering Camp

	Self-Catering Camps	> 8 < 40 beds, permanent structure, accommodation and self-catering facilities only - tourism activity		
1		Lunga, Kafue, Kafue Flats	WECSZ	Chabila Camp
2	20	Lunga, Kafue, Kafue Flats	WECSZ	Kafwala Camp
3	18	South Luangwa	Lupande Safaris	Wildlife Camp
Sub-total				
Averages				
	Community Camps	< 17 beds, permanent or semi-permanent structure, accommodation and some client services - cultural		
1	8	Lower Zambezi	Chiawa Community	Community Camp
2	8	Northern - Bangweulu	Chikuni Community	Chikuni Community Camp
3	8	South Luangwa	Kawaza Community	Kawaza Village Camp
Sub-total				
Averages				
	Bush Camps	< 9 beds, seasonal structure, all client services - tourist activity focus		
1		Livingstone and the Rapids	?	Chundukwa Bush Camp
2	16	Livingstone and the Rapids	Tongabezi	Sindabezi Island Camp
3		Lower Zambezi	?	Andy's Samango Canoe Camp
4		Lower Zambezi	?	Kawalata Camp
5		Lower Zambezi	G&G Safaris	Old Mondoro Bush Camp
6		Lower Zambezi	Lion Roars	Inswi Camp
7	40	Lower Zambezi	R Miller	Musensenshi
8		Lunga, Kafue and Kafue Flats	Lufupa	Lufupa Busanga Camp
9		Lunga, Kafue and Kafue Flats	Mukambi	Mukambi Bush Camp
10		Lunga, Kafue and Kafue Flats	Nanzhila Safaris	Nanzhila Tented Camp
11	28	Lunga, Kafue and Kafue Flats	Wilderness Safaris	Lunga Busanga Camp

Bush Camps (Cont'd.)

12		Northern - North Luangwa	Kutandala	Kutandala Camp
13		Northern - North Luangwa	Remote Africa	Mwaleshi Camp
14	20	Northern - North Luangwa	Shiwa Safaris	Buffalo Camp
15		South Luangwa	?	Zebra Plains
16		South Luangwa	Bush Camp Company	Bilimungwe trails
17		South Luangwa	Bush Camp Company	Chamilandu
18		South Luangwa	Bush Camp Company	Chindeni
19		South Luangwa	Bush Camp Company	Kuyenda/Manzi
20		South Luangwa	Bush Camp Company	Lower Kapamba
21		South Luangwa	Bush Camp Company	Upper Kapamba
22		South Luangwa	Kafunta	Kafunta Island Camp
23		South Luangwa	None	Panza
24		South Luangwa	Norman Carr's Safaris	Kakuli
25		South Luangwa	Norman Carr's Safaris	Lubi
26		South Luangwa	Norman Carr's Safaris	Muchenja
27		South Luangwa	Norman Carr's Safaris	Nsolo
28		South Luangwa	Remote Africa	Chikoko
29		South Luangwa	Remote Africa	Crocodile
30		South Luangwa	Remote Africa	Kasansanya
31		South Luangwa	Robin Pope Safaris	Baka Baka
32		South Luangwa	Robin Pope Safaris	Tena Tena
33	116	South Luangwa	Shenton	Upper Mwambwa
34		Western and North-Western	African Parks	Liuwa Tented Camp
35		Western and North-Western	?	Sakazima Island Camp
36		Western and North-Western	Royal Barotse Safaris	Mutemwa Lukulu Camp
37	30	Western and North-Western	Royal Barotse Safaris	Mutemwa Sioma Ngwezi Camp
Sub-total				
Averages				

Walking/Mobile Camps

	Walking/Mobile Camps	< 7 beds, temporary structure, accommodation, meals and most client services - tourism activity focus		
1	6	Livingstone and the Rapids	African Horizons	Livingstone Adventure Centre
2	6	Northern - Kasama	Thorn tree Safaris	Thorn tree Mobile Safaris
3	6	South Luangwa	Robin Pope Safaris	Mupumadzi Walking Safaris
4	6	Western and North-Western	Royal Barotse Safaris	Mutemwa Sioma Ngwezi Fly
Sub-total				
Averages				
	Large Houseboats/Cruisers	> 10 beds, accommodation, meals and most client services - tourism activity focus		
1		Kariba Lakeside	?	Sinazongwe Houseboat
2		Kariba Lakeside	Eagles Rest	Eagles Rest Houseboat
3	86	Kariba Lakeside	Lake Safari	Lake Safari Houseboat
4		Livingstone and the Rapids	Angle Zambia	Angle Zambia Houseboat
5	32	Livingstone and the Rapids	Kingfisher	Kingfisher Houseboat
Sub-total				
Averages				
	Small Houseboats/Cruisers	< 11 beds, accommodation, meals and most client services - tourism activity focus		
1	6	Kariba Lakeside	Lake Kariba Inns	Lake Kariba Inns Houseboat
2	6	Lunga, Kafue, Kafue Flats	?	Mwanachingwala Houseboat
Sub-total				
Averages				

Camp Sites

	Camp Sites	Unlimited, camping spaces and at least ablution facilities, sometimes catering facilities		
1		Kariba Lakeside	?	Eagles Rest Camp Site
2	50	Kariba Lakeside	?	Sinazongwe Camp Site
3		Livingstone and the Rapids	?	Maramba River Camp Site
4		Livingstone and the Rapids	Jungle Junction	Bovu Camp Site
5	84	Livingstone and the Rapids	Safari Par Excellence	Zambezi Waterfront Tents
6		Lower Zambezi	?	Bridge Camp Camp Site
7	36	Lower Zambezi	?	Mvuu Camp Site
8		Lunga, Kafue, Kafue Flats	Lufupa	Lufupa Camp Site
9		Lunga, Kafue, Kafue Flats	Mukambi	Mukambi Camp Site
10	62	Lunga, Kafue, Kafue Flats	Puku Pans	Puku Pans Camp Site
11		Northern - Kasanka	Kasanka Trust	Kasanka Camp Sites
12		Northern - Lake Tanganyika	?	Nkupi Lodge Camp Site
13		Northern - Mpika	Mutinondo	Mutinondo Camp Site
14	89	Northern - Shiwa	Kapishya	Kapishya Camp Site
15		South Luangwa	Flatdogs Company	Flatdogs Campsite
16	180	South Luangwa	Lupande Safaris	Wildlife Camp Site
17		Western and North-Western	African Parks	Liuwa Camp Site
18	20	Western and North-Western	Royal Barotse Safaris	Maziba Camp Site
Sub-total				
Averages				
TOTAL				
Averages				