
Summary of Zambia Tourist Survey – preliminary results

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(with thanks to Goodson Sinyenga)

Context

- Government of Zambia, the World Bank, UNDP, DANIDA, Natural Resources Consultative Forum and partners are carrying out a study on the potential for expanding nature tourism in Zambia
- Three main pieces:
 - Survey of tourists – economic impact and willingness to pay for improvements
 - Survey of residents of Game Management Areas – poverty impact
 - Update of the strategic plan for the Zambia Wildlife Authority

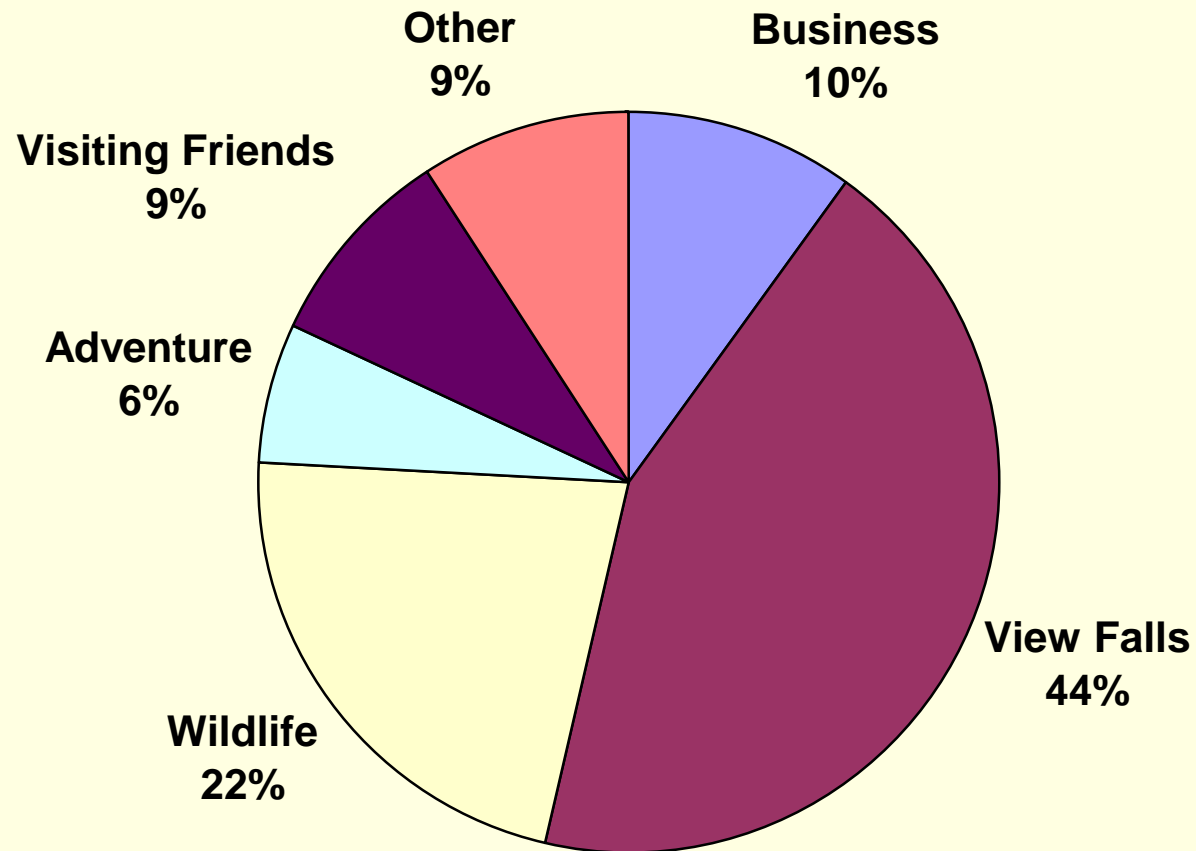
Tourist Survey carried out Oct/Nov 2005

- This survey targeted tourists at the international airports of Lusaka and Livingstone, as well as tourists at lodges/hotels in Livingstone, Kafue National Park, and South Luangwa National Park. A total of 1,578 tourists were interviewed, with foreign tourists comprising approximately 93% of the sample.

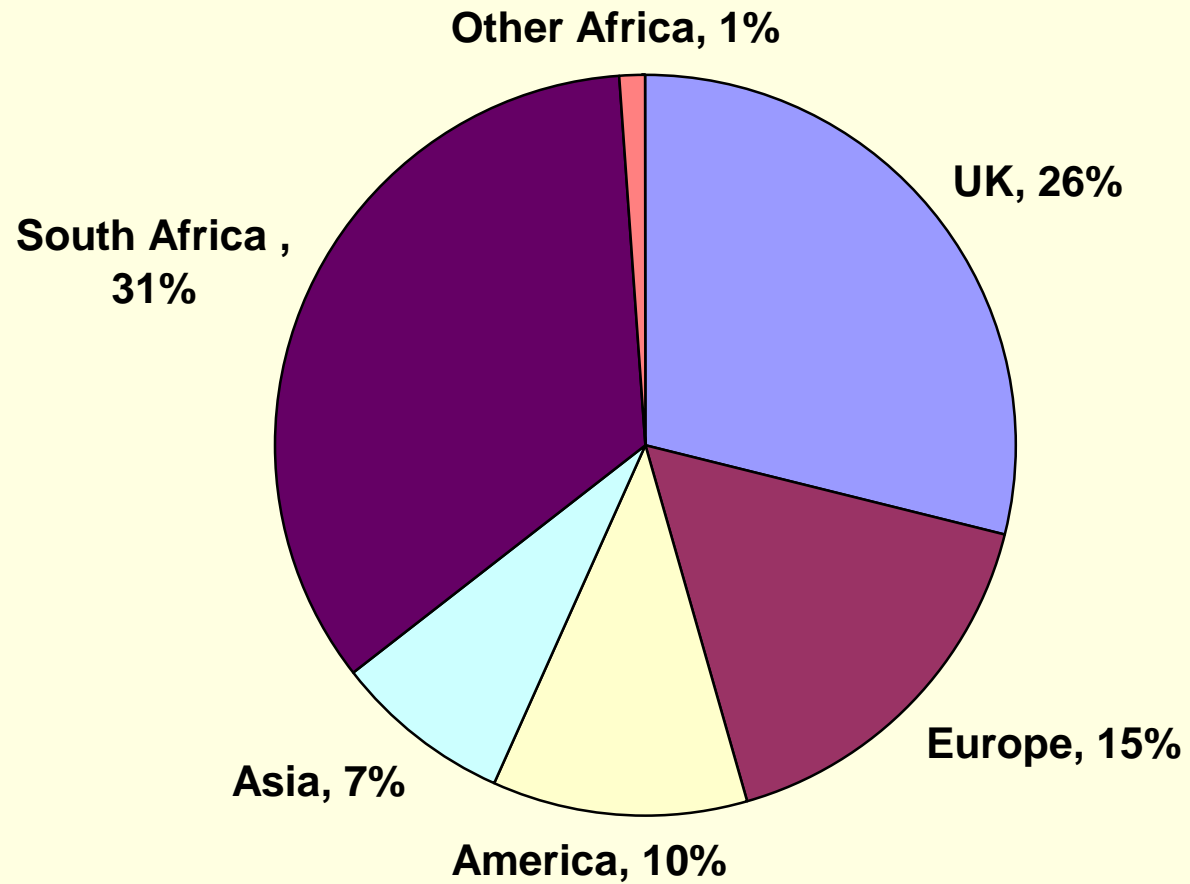
General characteristics of tourists

- 81% of working age (16-60)
- 78% currently employed
- 80% educated beyond secondary level

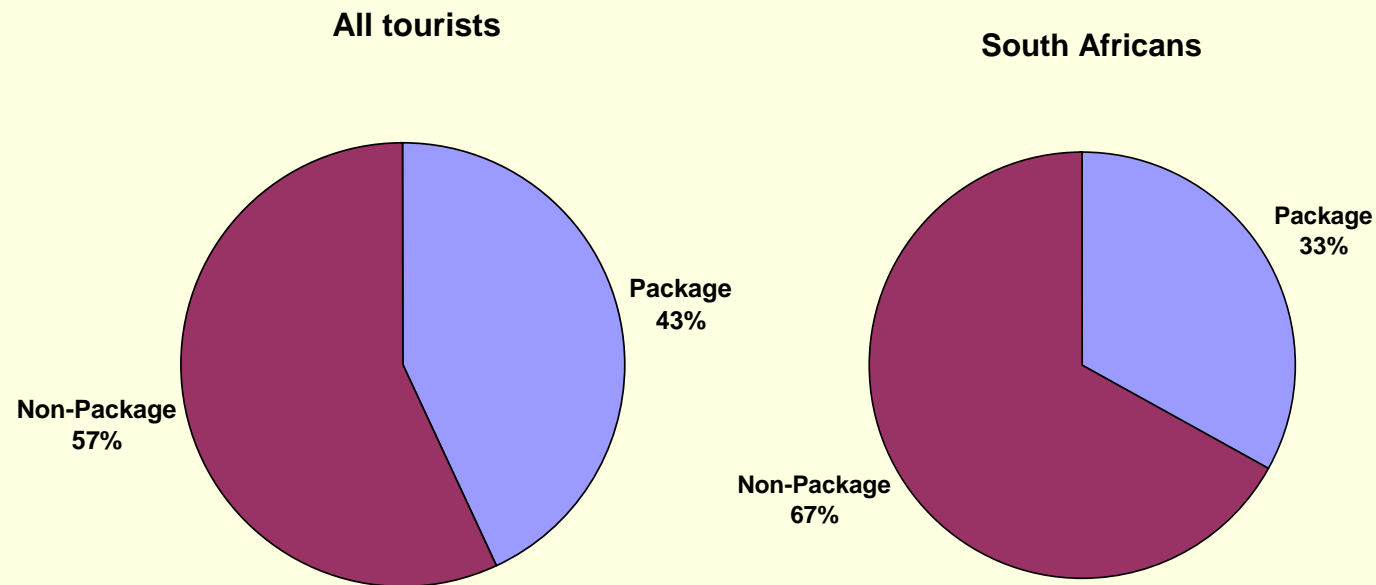
Purpose of visit to Zambia



Country of origin

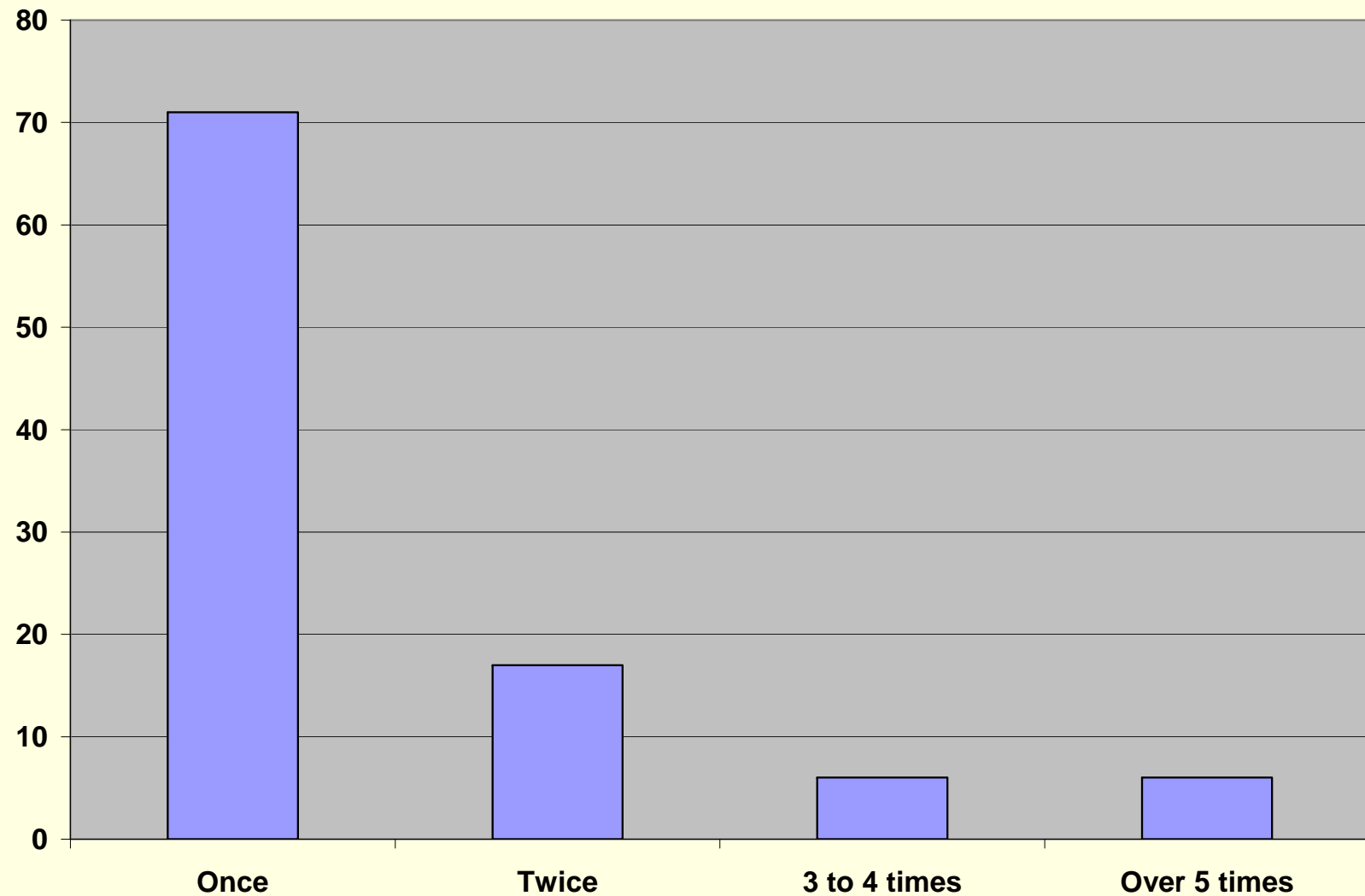


Package vs. non-package tourists

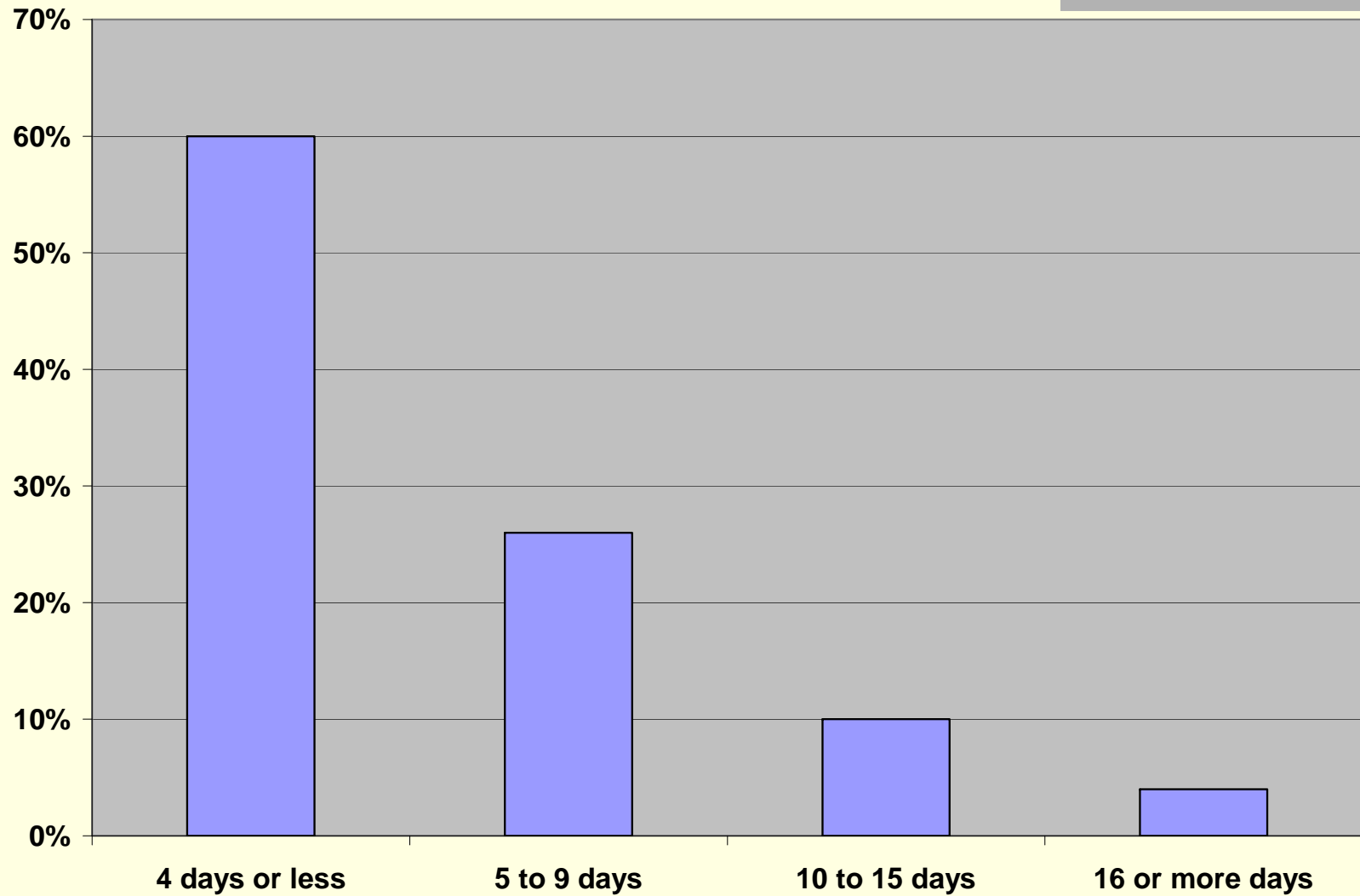


30% of all tourists arrive on a full package (including airfare).

Frequency of visits to Zambia



Duration of stay

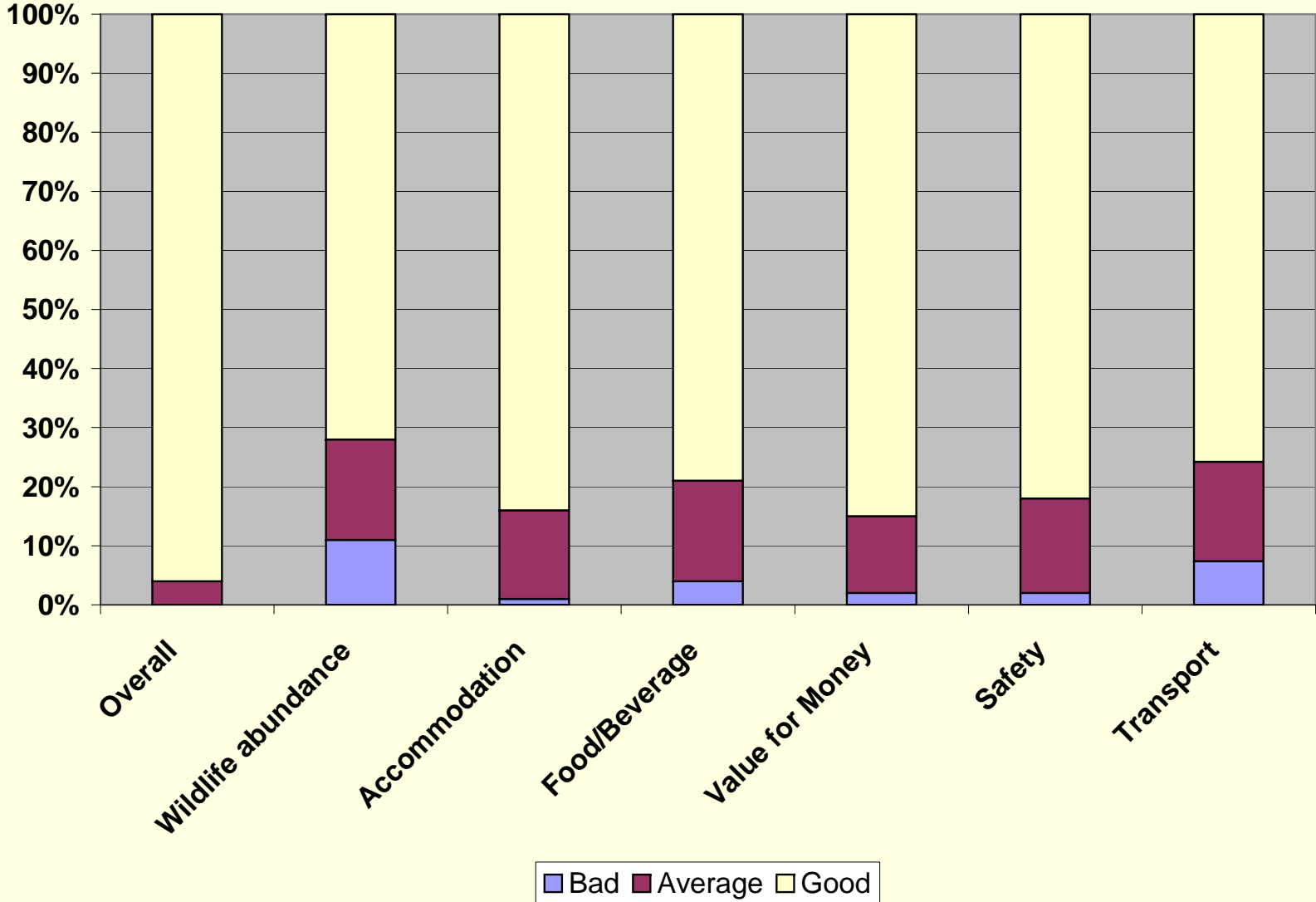


Potential benefits of a 'tourist trail'

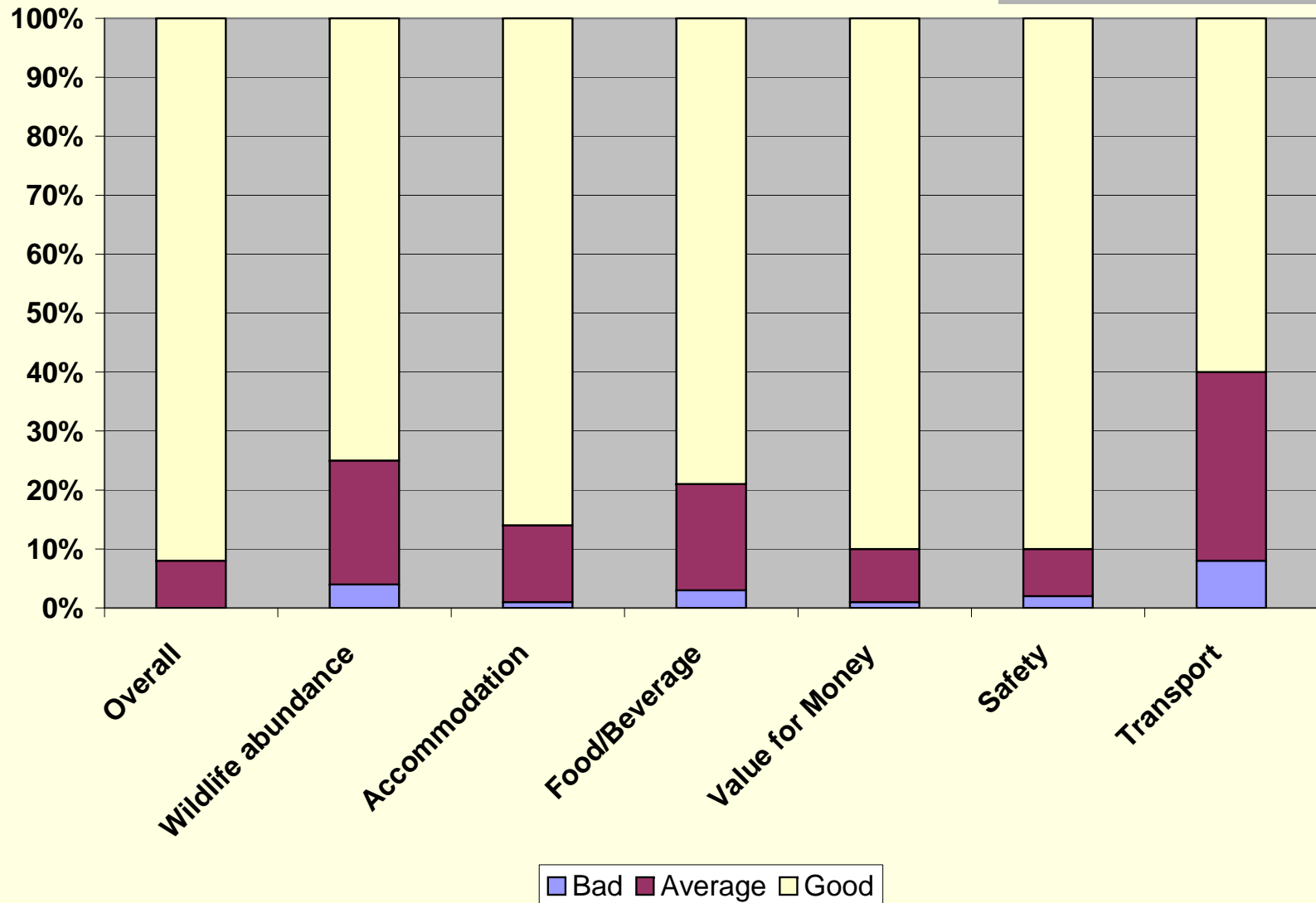
Number of sites visited	Proportion of tourists	Expenditure - no package	Expenditure - full package
1	84%	1,780	2,928
2	12%	1,898	3,863
3	3%	2,877	4,698
4	1%	6,135	7,830

E.g. – Doubling the proportion of tourists who visit two sites would generate another \$9 - \$73 million in tourism exports (based on 650,000 tourists/yr.)

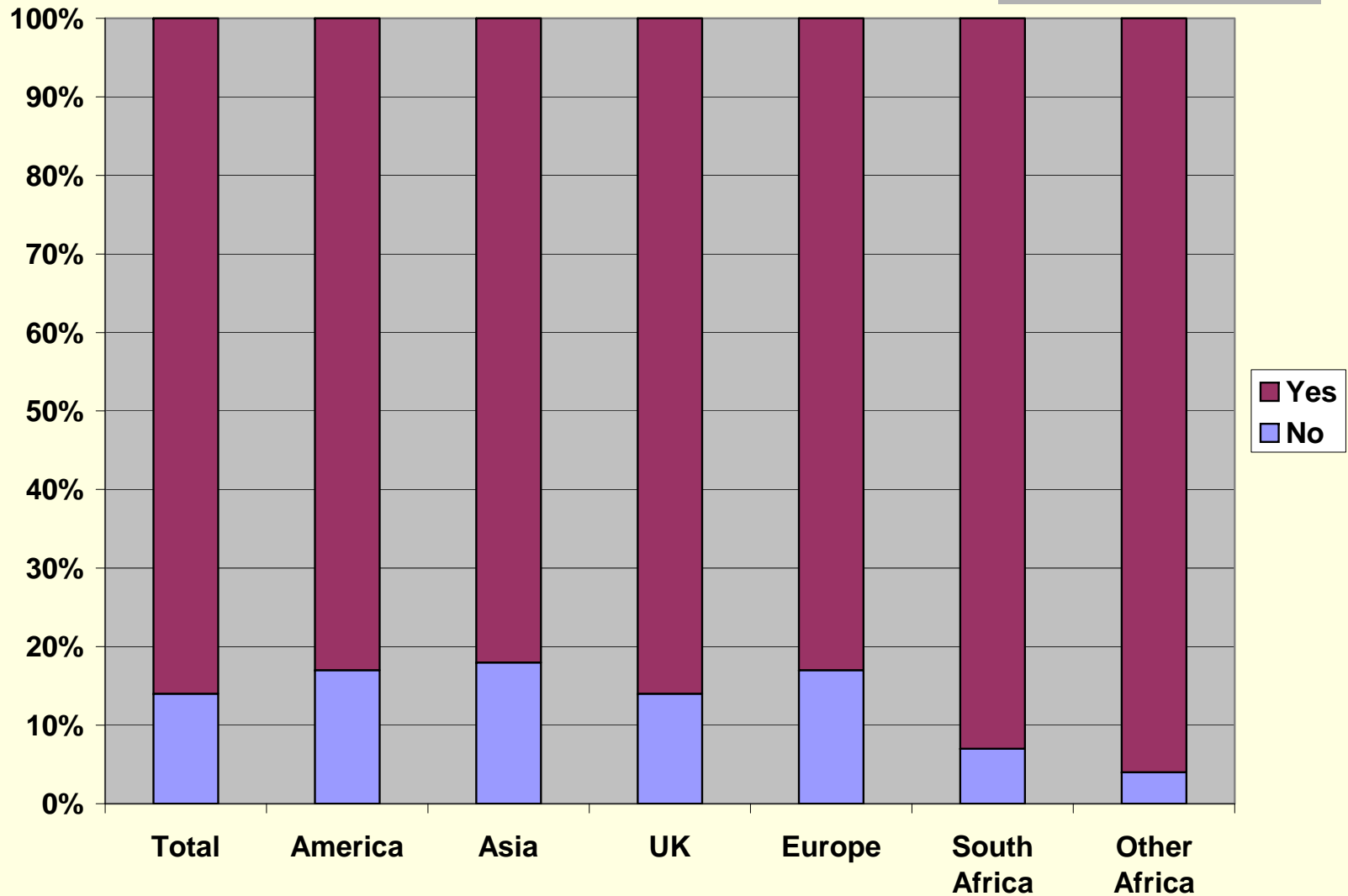
Perceptions of quality – L. Zambezi NP



Perceptions of quality – Kafue NP



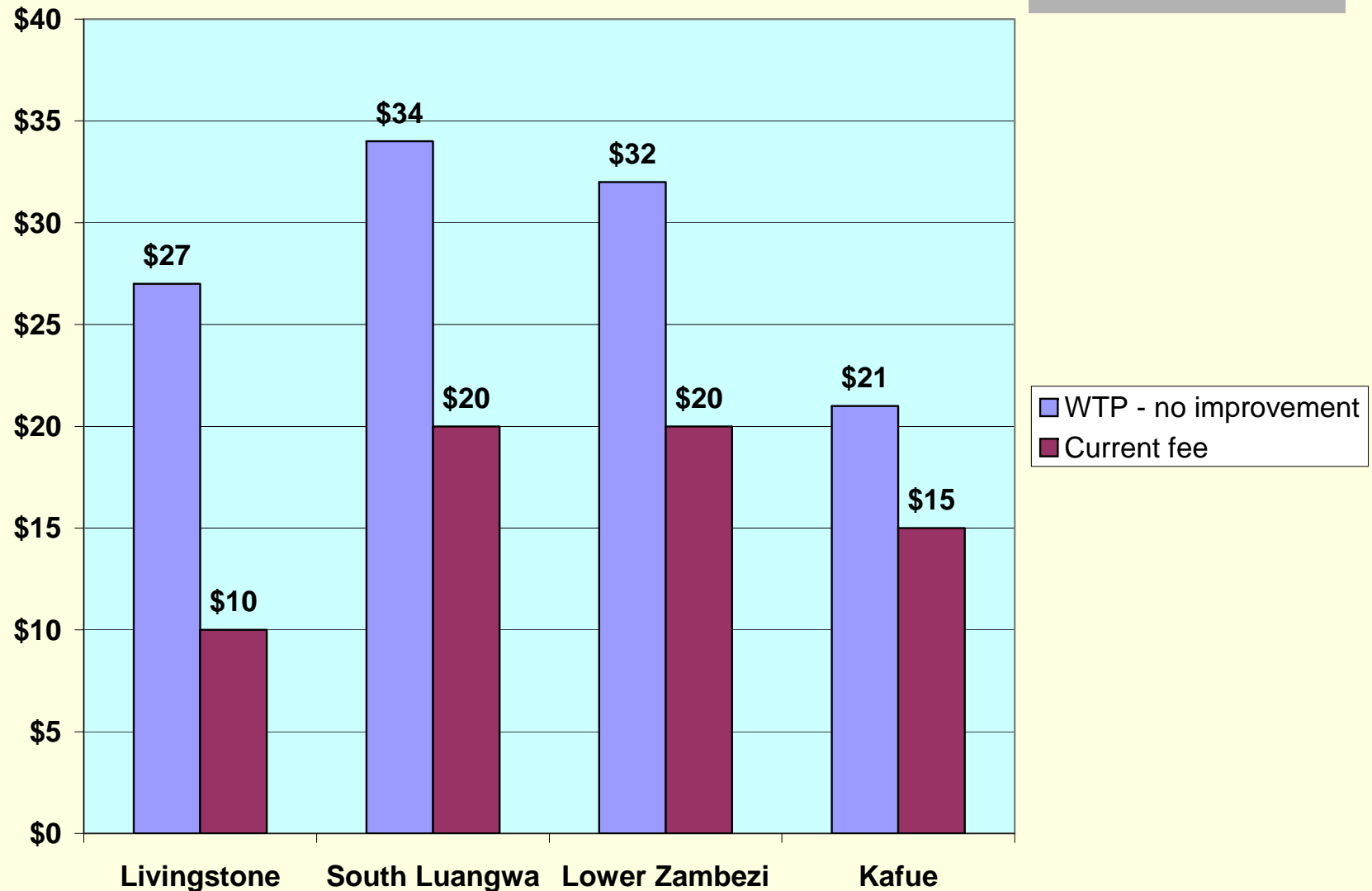
Would visit Zambia again



Willingness to pay question #1

- **While you were planning your trip to Lower Zambezi National Park you learned that the entry fee had increased. What would be the maximum fee you personally are prepared to pay to visit Lower Zambezi National Park? This is the amount above which you would choose not to visit this park at all.**

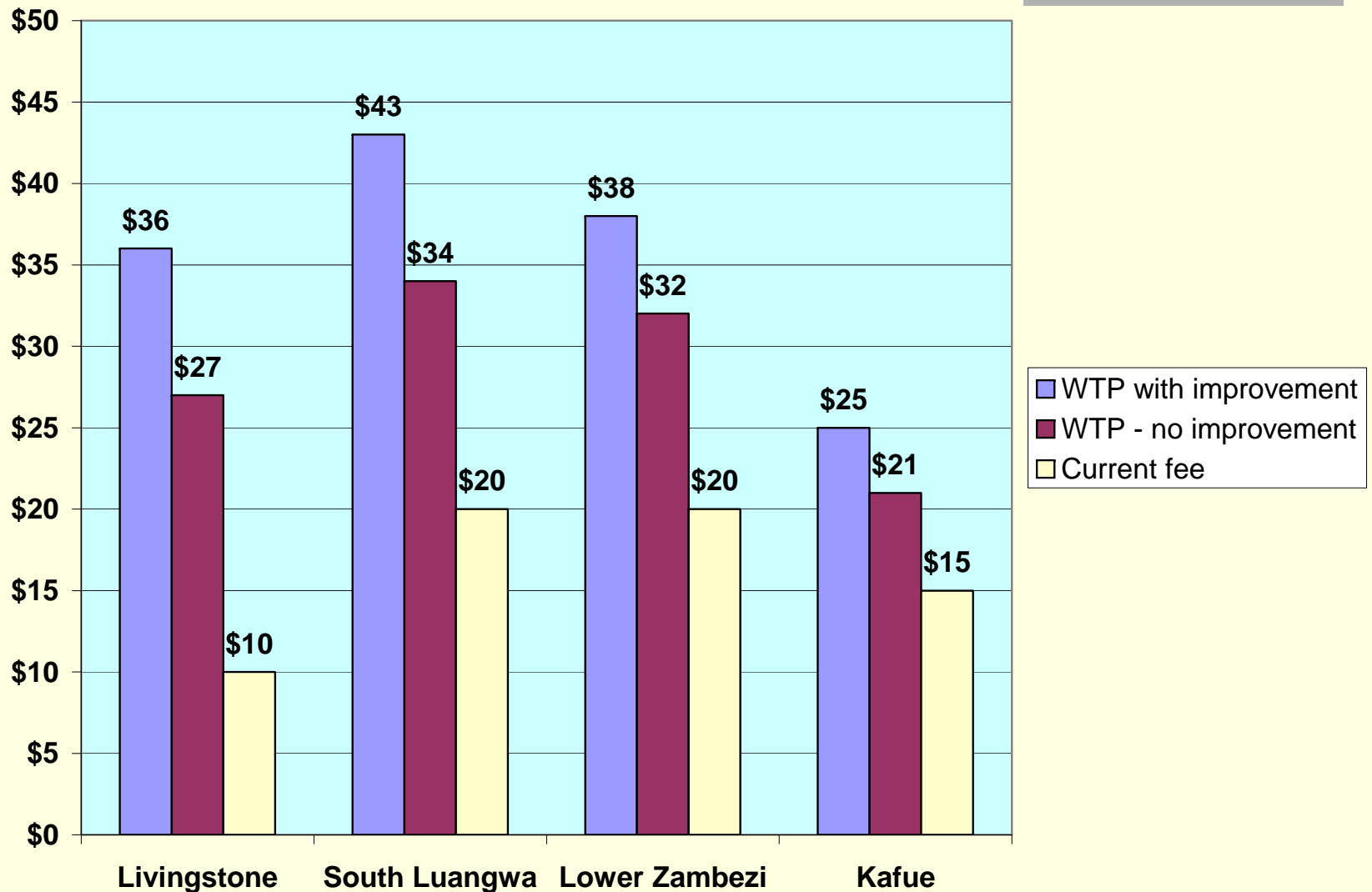
Willingness to pay – no improvement (\$ / person / day) (preliminary results)



Willingness to pay question #2

- **There have been proposals to improve the quality of the visit to Lower Zambezi National Park for tourists and raise more revenue for natural resources management. These include:**
 - **i) Road improvement and increase in the number of lodges.**
 - **ii) Increasing the abundance of animals in Lower Zambezi National Park.**
- **What would be the maximum fee you personally are prepared to pay to visit Lower Zambezi National Park in this case?**

Willingness to pay – with improvement (\$ / person / day) (preliminary results)



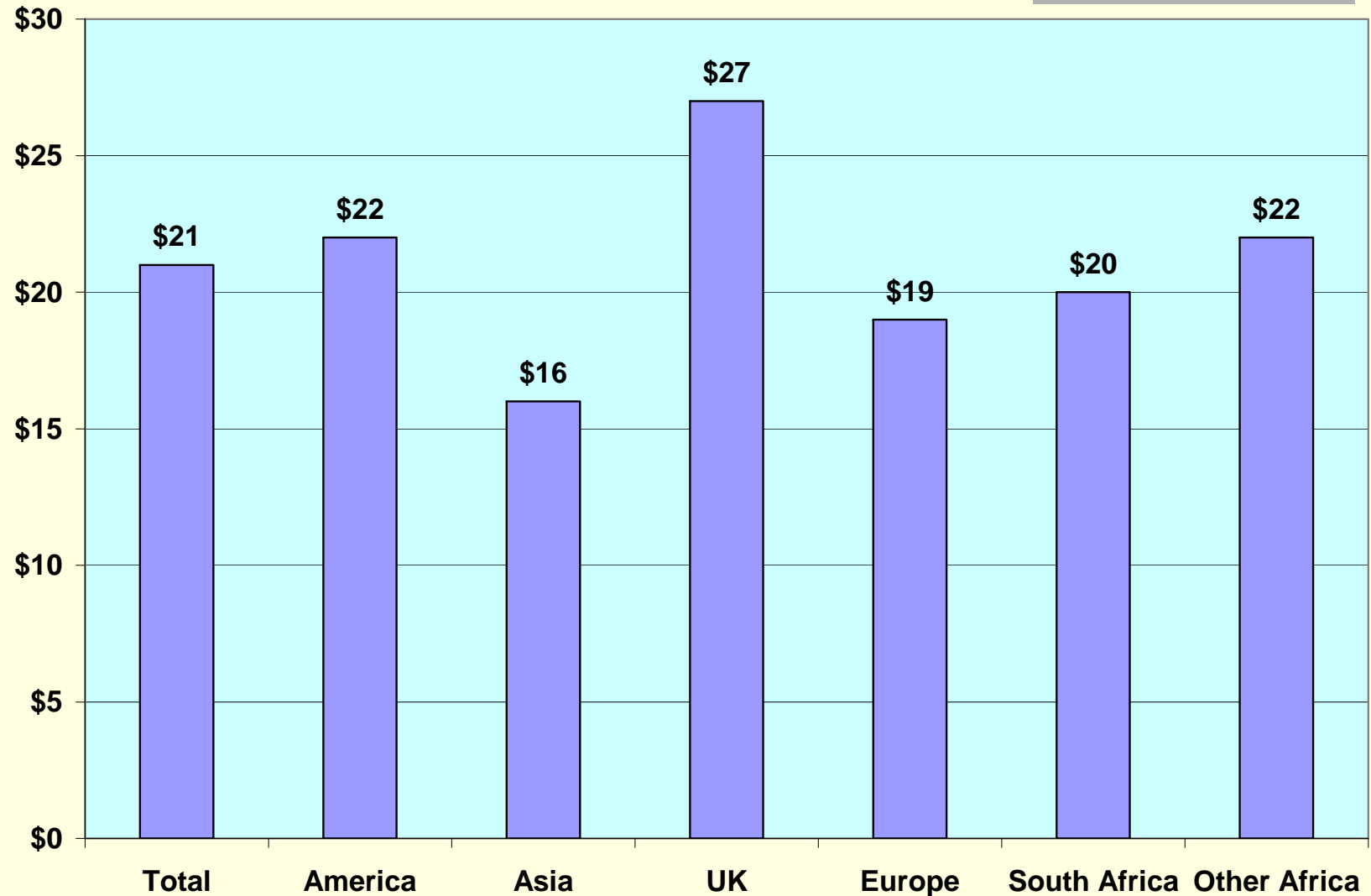
Willingness to pay question #3

- **Suppose that the government is considering doubling the number of main tourism sites by also equipping Kafue National Park, Kasanka and Lake Tanganyika. This will imply re-stocking some of the wildlife that has been lost to poaching in these sites and providing adequate tourist facilities.**
- **The additional sites have some distinguishing features. Kafue will be the largest wildlife area in Africa. Kasanka will provide tremendous bird watching opportunities and Lake Tanganyika is the deepest lake in the world and harbour a huge crocodile population, some of them are reaching more than 6 meters length. These sites will provide different attractions and experiences not found in Livingstone, South Luangwa, or Lower Zambezi.**

Willingness to pay question #3

- If this project takes place, it would then increase the choice of natural destinations for tourists in Zambia. While part of the expenses would be funded by international donor organizations, it is most likely that funds would still have to be raised in the country.
- One option would be to set a conservation tax for every tourist entering the country.
- What is the maximum conservation tax you personally would be prepared to pay, per person, on arrival in Zambia, in order to have the option of visiting these three additional sites?

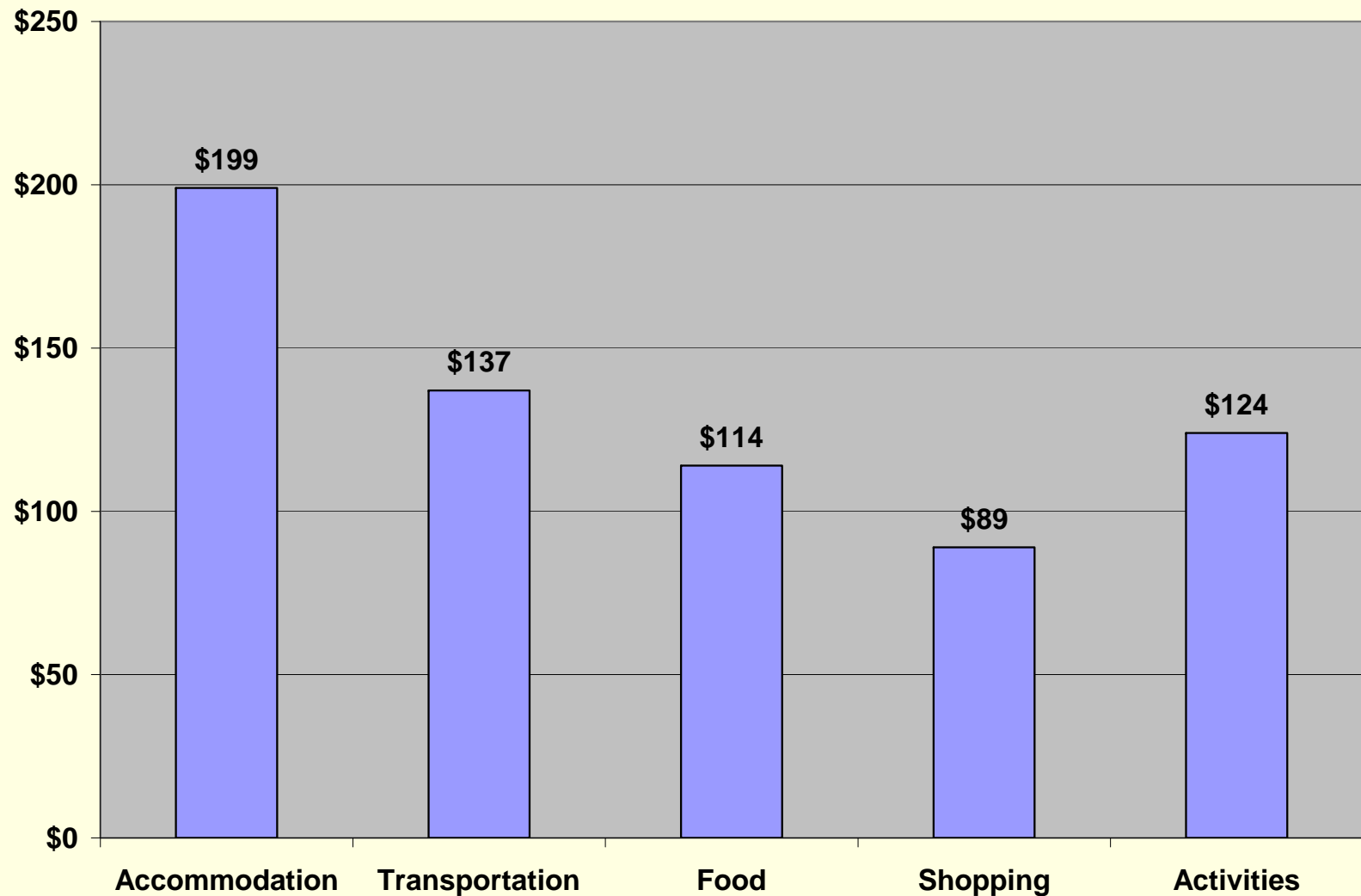
Willingness to pay conservation fee (\$ / person / arrival)



Potential size of conservation fee

- MTENR reports that 650,000 foreign tourists visited Zambia in 2005
- A conservation fee of \$20 per person paid at entry would therefore generate \$13 million in annual revenues for conservation activities

Non-package tourists spend \$663 / person / trip on accommodation, transport, etc.



Value of tourism exports

- Assumption 1: all tourists spend \$663 / person / day
- Assumption 2: all food and shopping are direct import leakages
- Assumption 3: leakage of 20% (agent fees, profits held offshore) on package tourists
- Value of tourism exports = \$271 million (5.9% of GNI)

(does not include indirect or induced effects)

Conclusions (1)

- Zambian tourists are (typically) well-educated Europeans and South Africans, who spend on average \$663 / person / trip in Zambia
- 7% of tourists are Zambian residents
- 70% of tourists are on their first trip to Zambia
- Over 70% of tourists are nature tourists
- 84% of tourists visit only one site in Zambia
- 43% of tourists arrive on full or partial packages

Conclusions (2)

- Perceptions of the quality of the national parks are very positive, and 86% would visit Zambia again
- Tourists would pay 50-100% more in park fees / person / day depending on whether improvements were made (preliminary result)
- They would pay \$21 / person / trip in conservation fees in order to have the option to visit more (upgraded) parks in the future

Economic impact

- Park revenues could increase 50-100% if investments are made (preliminary result)
- Conservation fees could raise \$13 million per year, if invested in improvements
- Doubling the tourists who visit two sites could raise exports by \$9 - \$73 million per year
- A conservative estimate of tourism exports is \$271 million in 2005, or 5.9% of GNI – more refined estimates, including indirect and induced effects, will raise this substantially