



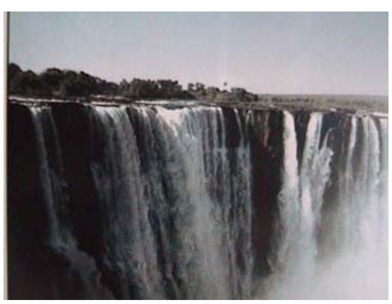
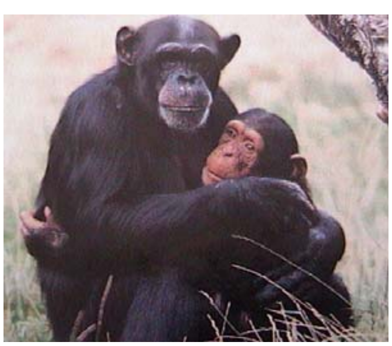

NATURE-BASED TOURISM DEMAND IN ZAMBIA

November 2005

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Report prepared by

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ACRONYMS

GDP	Gross Domestic Product
GMA	Game Management Area
KNP	Kafue National Park
NAC	National Airport Corporation
NRCF	Natural Resource Consultative Forum
PRSP	Poverty Reduction Strategy Paper
TCT	Tourism Conservation Tax
UK	United Kingdom
UNDP	United Nations Development Programme
WB	World Bank
WTO	World Tourism Organisation
WTP	Willingness To Pay
WTTO	World Travel and Tourism Council
ZESCO	Zambia Electricity Supply Company
ZNTB	Zambia National Tourism Board

PREFACE

The Natural Resource Consultative Forum (NRCF) is happy to be part of the study on the Nature-Based Tourism Demand in Zambia. This study was jointly commissioned by the United Nations Development Programme (UNDP), the World Bank (WB) and the NRCF. The subject matter of the study is quite familiar to many who have stakes in the tourism industry. However, the unique scope and depth of the enquiry makes it the first of its kind in Zambia. The Tourism Demand Survey was carried out during the month of November 2005 covering four interview locations, namely the Livingstone and Lusaka international airports, the South Luangwa and Kafue national Parks.

The importance of Nature-Based Tourism Demand Study in Zambia cannot be under- scored. The study has helped illuminate the potential that the tourism sector has for the country's economic development. Given the poor performance of the economy partly due to instability in the mining sector especially during the last 2 decades, tourism provides a viable alternative for foreign exchange earnings for the country.

In addition the Government intends to increase the contribution of tourism to economic growth and poverty reduction (PRSP, 2002). Indeed, tourism has remained an overlooked opportunity for economic development given the potential that the country has. Zambia has abundant natural resources ideal for tourism development. However, these resources have not been fully exploited for them to lend support to an ailing economy.

Despite the importance that the Government attaches to tourism, very little is known about the value of nature-based tourism. Worse still, there is also scanty information regarding the nature and socio-economic characteristics of the tourists that visit the country's tourism sites. The Tourism Demand Study provides, in a comprehensive way, a better understanding of the socio-economic characteristics of tourists that visit our natural sites.

Apart from looking at the background and origins of the tourists and the nature of their cost of travel, the study has attempted to get as close as possible to the tourists in so far as their experiences are concerned during their visit to the country's natural sites. Knowing the various needs of tourists is the only way we can be able to help promote the growth of nature based tourism and increase it's contribution to the national economy. Further, the study has attempted to collect information that can be used to put some value to the main tourism sites in Zambia namely, the Victoria Falls together with the Mosi O Tunya National Park, South Luangwa, Lower Zambezi and Kafue National Parks. This valuation has been based on the tourists Willingness To Pay (WTP) for increased entry fees based on expected improvements in recreational services in the identified sites.

Various stakeholders in the tourism industry have conducted similar surveys in the past. Over the last few years, the Zambia National Tourism Board (ZNTB) has been undertaking Tourists Exit Surveys in airports chiefly for marketing purposes. The Ministry of Tourism, Environment and Natural Resources (MTENR) has also been processing immigration records to capture visitors arrival. However, these sources of data fall short of meeting all the information that is required to inform tourism policy Makers, Planners and Managers. Further, the information does not allow for analysis of the impact of the sector on the national economy.

Indicators from this study can also be used for establishing the true contributions of the natural assets and tourism to the Gross Domestic Product. Further, results from the survey especially the indicators on the Willingness To Pay (WTP), can be used to attach some economic value to our natural assets using Contingent Valuation methods and the Travel Cost Methodologies that have been developed specifically for valuing natural assets.

The NRCF would like to acknowledge the technical and financial contributions of the World Bank (WB) and the United Nations Development Programme (UNDP) to the study. We would also like to extend our gratitude to the Development Services and Initiative (DSI) for administering the study funds.

The following people played greater roles in the implementation of the study:

Mr. Goodson Sinyenga	National Survey Consultant
Mr. David Mulolani	NRCF Coordinator
Mr. Benjamin Guillion	World Bank Specialist

NRCF shall remain grateful to the National Survey Consultant, Field interviewers and their Supervisors for their hard work and dedication. We are also grateful to the tourist respondents for patiently and generously sparing their valuable time for this study. This study was not going to succeed without the patience and generosity that was exhibited by the wonderful tourists.

It is my hope that Users will find this report useful to their day-to-day activities and programmes. This study report will only be worthwhile if stakeholders in the tourism sector make use of its findings for the improvement and development of tourism in Zambia.

Dr. Henry Mwiima
Chairman
NATURAL RESOURCES CONSULTATIVE FORUM

EXECUTIVE SUMMARY

Background

Zambia has considerable untapped natural resources for tourism development. However, these resources have not been potentially exploited for them to lend support to an ailing economy which has heavily depended on copper exports for it's revenue base and foreign exchange earnings for more than 3 decades. Indeed, the tourism sector has remained an overlooked opportunity for Zambia's economic growth for a long time. In the spirit of economic diversification, the government's long-term vision for tourism sector is "to ensure that Zambia becomes a major tourist destination of choices with unique features that contribute to sustainable economic growth and poverty reduction" (Second PRSP report, 2005). Further, Government intends to increase the contribution of the sector to GDP from the current 5 percent to at least 10 percent.

Despite the importance associated with the sector, there is very little information regarding the sectors potential for economic growth. In addition, there is absence of good information on the characteristics of the tourists that visit our natural sites including national parks and water falls. It is from this backdrop that the Natural Resources Consultative Forum (NRCF), the United Nations Development Programme (UNDP) and the World Bank (WB) collectively decided to undertake a tourism demand survey covering four major tourism sites in Zambia.

The Nature-Based Tourism Demand Survey was conducted during the month of November 2005. The survey targeted and covered a random sample of 1, 578 exiting foreign tourists as well as local tourists that had visited at least one of the 4 main national parks and sites in Zambia, namely, the Mosi O Tunya National Park together with the Victoria Falls, the Lower Zambezi national Park, the South Luangwa National Park and the Kafue National Park. Information was collected by way of personal interviews using a semi structured tourist questionnaire. Exit Interviews were carried out in Lusaka and Livingstone international airports as well as in the lodges/hotels around the targeted sites.

One major limitation of the survey is that it was conducted during the time when the tourism season was coming to an end particularly in the four national parks. Another limitation of the study was that it employed a cross-sectional sample of November tourists whose characteristics might not be representative of the April – October tourists. Language barrier was one of the major constraints faced during data collection especially when it came to Non-English speaking tourists.

Objective and scope of the study

The overall objective of the tourism demand survey was to collect information that would help determine the value of the national parks as well as magnitude of the current demand for nature-based tourism in Zambia. Specifically, the survey was designed to provide some of the answers to the following 10 broad questions:

1. Who are the tourists that visit our natural tourism sites?
2. What are their socio-economic characteristics?
3. Where do the tourists that visit nature based tourism sites come from?
4. How do the international tourists make their travel arrangements and how is their travel pattern?
5. Which natural sites do these tourists usually visit and what is their duration of stay in Zambia?
6. How much on average do tourists from various parts of the globe spend on their trips?

7. What is the current level of tourists "Willingness To Pay" for current and improved recreation services in national parks and waterfalls area? Are the tourists willing to pay a conservation tax?

8. What is the economic impact of tourism on the national economy?

9. What is the estimated direct use-value of the Zambian National Parks and other heritage sites that are visited by tourists?

10. And finally, what story do the tourists have to tell about their experience in Zambia?

The survey broadly covered the following topics:

(i) The socio-economic characteristics of both international and resident tourists

(ii) General tourist trip information including the cost of travel

(iii) General park or falls visit information and their associated costs for recreational activities

(iv) Tourists perception of the quality of Zambian Parks and falls

(v) The tourists' willingness to pay for current and improved recreational services found in parks and falls areas.

Key Findings

The findings of this report are based on the sample of about 1, 578 tourists that had visited either the Victoria Falls together with the Mosi O Tunya national park, the South Luangwa National Park, Lower Zambezi National Park or the Kafue National Park. The survey has revealed that the tourism market for Zambia cuts across all the 7 continents on earth.

Demographic and Socio-economic Characteristics of Tourists

The distribution of tourists with their entourage by age show that the majority of the tourists that come to Zambia are aged between 16 and 60 years, constituting 81 percent of all the tourists. Results further show that Child Tourism in Zambia is yet to grow. The distribution of tourists by age shows no major sex differences. On average, tourists traveled in groups of 3 persons. The majority of tourists traveled as couples (41 percent), followed by groups of 3 to 6 persons, at 22 percent. Results show that most of the tourists from Asia, South Africa and Europe (excluding UK) are more of companion travelers. Furthermore, the majority of tourists prefer to travel with family and friends, at 45 percent.

The Tourism Demand Study has also revealed that the majority of the visitors to Zambia's tourism sites are well educated, with 68 percent holding a minimum of a college degree. Nearly 80 percent of the travelers that come to Zambia are in gainful employment. These results demonstrate the linkage between education and employment on one hand and tourism development on the other hand. The survey also reveals that the majority of the foreign tourists are well traveled in the Sub-Saharan Africa, at 90 percent. Most of the tourists had visited Zambia for purposes of viewing the Victoria Falls and wildlife, at 65 percent. About 71 percent of the tourists that were interviewed had visited Zambia for the first time. Nearly one-third of the tourists were repeat veteran visitors to Zambia.

Tourists' Duration of stay and Travel status

The main points of entry for the survey tourists were Livingstone and Lusaka international airports, accounting for 77 percent. One in every 10 tourists also entered the country through Kazungula border post. The survey has also shown that 44 percent of the tourists spent over 6 days in Zambia. Another 43 percent spent about 3 to 6 days in the country. Results from the survey further show that returning tourists on average spend more days in Zambia than first-timers. Results also show that tourists on average spent 3 days in Livingstone town, South Luangwa and the Lower Zambezi National Parks compared to the average of 4 days in the case of Kafue National Park.

The 2005 Tourism Demand Survey has shown that there are 2 broad classes of tourists that come to Zambia, namely the Packaged and Non-Packaged tourists. Packaged tourists are those travelers whose trip is pre-arranged at a fee by tour operators whilst Non-Packaged tourists make their own travel arrangements. Results show that 57 percent of the tourists that came to Zambia were Non-Packaged tourists. The survey has also revealed that Non-Packaged tourists are more likely to spend more days in Zambia than Packaged tourists. Furthermore, returning tourists are more likely to visit Zambia based on their own travel arrangements than those tourists that are on their maiden trip. Further characterization of tourists reveals that 51 percent of the tourists are single destination travelers, i.e. they were only visiting Zambia on their trip. The remainder were multiple-country destination tourists, i.e. they were visiting more than one country. The majority of the Non-Packaged tourists were visiting Zambia only. The opposite is true for the Packaged tourists.

What tourists have to say about their experience in Zambia's tourism sites

Generally, tourists were very much satisfied with different aspects of their trip experience in various tourism sites. Specifically, tourists were more than happy with the available wildlife in the game parks and with the friendliness of the Zambian people. The Travelers also never exhibited major misgivings regarding the quality of accommodation and food in the tourism sites that were visited.

During the Tourism Demand Survey, tourists were also asked to make suggestions on areas of tourism that required improvements. A significant number of tourists echoed the need to improve on the provision of information relating to the country's tourism sites. A good number of tourists also demanded for the improvement of the road infrastructure leading to the tourism sites as well as within the tourism sites. Other tourists also echoed the need to introduce scarce wildlife species in some parks such as leopards, lions and rhinos. Some tourists called for the increase in numbers of Game scouts as a way of effectively protecting certain species of wildlife from extinction.

There was overwhelming response from the tourists on the issue of visiting Zambia again in the near future. About 86 percent of the tourists indicated that they will come to Zambia again in the near future. In the event of closure of preferred choice of destination, more than 50 percent of the tourists indicated that they would still visit other sites within Zambia as opposed to going to other countries. The majority of the tourists had quite some good memories about Zambia and it's amazing tourism sites. The majority of the tourists were awestruck with the closeness of wildlife and the sight of a massive Victoria Falls. Others considered the friendliness of the Zambian people as worth reliving. Some tourists also had something good to tell about the river based activities in the national parks.

Willingness to Pay

Tourists were asked to indicate their Willingness To Pay (WTP) an extra entry fee for expected improvements in recreational services. In the event of an increment in the park entry fees, tourists were willing to pay as much as US$28, US$35, US$32 and US$22 for entering Mosi O Tunya, South Luangwa, Lower Zambezi and Kafue National parks, respectively. These amounts are far much higher than the current entry fees of US15, US$20, US$20, and US$15 to the above parks. In the event of improvements in recreational services in the parks such as increasing the numbers of lions, leopards, rhinos, etc., tourists indicated that they would pay a maximum of US$37, US$44, US$39 and US$28 for entering Mosi O Tunya, South Luangwa, Lower Zambezi and Kafue National Parks, respectively. On the subject of Government introducing a Tourism Conservation Tax (TCT) to help raise funds for tourism development, foreign tourists were overwhelmingly willing to pay a tax of about US$21 upon entering the country. Local tourists has also indicated their willingness to pay a tax of US$26 preferably through some universal billing system.

Overview of Tourists Expenditure

The tourists' expenditure analysis contained in this report is based on expenditures that were incurred by foreign tourists who were visiting Zambia only. About 53 percent of these tourists were Non-Packaged travelers while 30 percent and 17 percent were on international and local travel packages, respectively. All tourists' expenses were expressed in per capita terms.

Tourists on average spent US$1,597 on international airfare. The per capita tourist expenditures for international packaged, locally packaged and Non-Packaged tourists were US$3, 067, US$2,844 and US$1, 810, respectively. These results reveal that it is cheaper to travel on own arrangement than on an international package.

CHAPTER 1: Background

1.1 Introduction

Zambia has considerable untapped natural resources for tourism development. These resources include abundant wildlife, rich cultural and natural heritage, abundant water resources and natural watercourses including waterfalls. In addition to these resources, the country boasts of tremendous peace and tranquility, all of which constitute the basic ingredient for tourism growth. However, these resources have not been potentially exploited for them to lend support to an ailing economy, which has heavily depended on copper exports for its revenue base and foreign exchange earnings for more than 3 decades. In 2000, for example copper and its byproducts generated about two-thirds of Zambia's foreign exchange earnings (Patel et al., 2002).

Moreover, as a result of this reliance on copper mining, the country has been susceptible to external shocks which have mainly been precipitated by falling international purchasing power of the mineral (Copper and its byproduct), coupled with a continuous decline in its production as a result of rising production costs. This development has contributed to the country's lackluster economic performance particularly during the last 2 decades. Worse still, the decision by Anglo American Corporation to withdraw from the mining operations in Zambia in 2002 simply exacerbated the already volatile economic situation. However, this development gave the government renewed impetus towards the diversification of the economy in which tourism, agriculture and light manufacturing industries are seen to be playing greater roles for economic growth in general and export growth in particular (Patel et al., 2002).

Indeed, the tourism sector has remained an overlooked opportunity for Zambia's economic growth for a long time. In the spirit of economic diversification, the current government's long-term vision for tourism sector is "to ensure that Zambia becomes a major tourist destination of choices with unique features that contribute to sustainable economic growth and poverty reduction" (Second PRSP Progress report, 2004).

In an attempt to make the contribution of the sector to the national economy translate into GDP growth, increased foreign exchange earnings and poverty reduction, the government had fully integrated the sector in the 2001 to 2005 PRSP programmes. Indeed, the government intends to increase the contribution of tourism-related activities to GDP from about 5% to 10% by 2010 (PRSP Report, 2004). However, according to the World Travel and Tourism Council report of 2005, tourism demand in Zambia is projected to achieve an annualized growth of about 5 percent. This implies that attaining the 10 percent target will require a substantial boost of the tourism sector (WTTC, 2005).

Using international visitors as a proxy of tourism demand, the current trends indicate that there is a steady increase in the demand for tourism related activities in the country from less than 200,000 tourists in 1995 to over 500,000 in 2005. According to the World Tourism Organisation report (WTO, 2004), Zambia together with other Sub Saharan African countries, where tourism is mainly nature based, received 13.3 million international visitors in 2003. In 2003, international visitor arrivals for Zambia stood at approximately 578, 000 and were growing at 8.14% between 2000 and 2003. Despite this high rate of growth, Zambia holds a tourism market share of only 4.3 percent. This percent share is very low given the country's current tourism potential. Various studies have shown that the majority of tourists that come to Zambia visit nature-based tourism sites such as the mighty Victoria Falls and the Mosi o Tunya Park, South Luangwa, Lower Zambezi and Kafue National Parks (WTO, 2004).

The high turnout of tourists at the country's natural tourism sites signifies the potential that the tourism sector has towards economic development. However, the government does not know the true economic value of nature-based tourism to the country. Further, since the sector is not a self-contained industry with well-defined boundaries, determining its contribution to the national economy from its supply side only has a tendency of ignoring the indirect as well as multiplier effects of the sector on the rest of the economy. Tourists by their nature usually demand for an array of goods and services that cut across the whole tertiary sector of the economy.

Given this context therefore, there is need to have a better understanding of the nature-based tourism demand and its underlying factors in Zambia if the government and its cooperating partners have to know the sectors potential for economic development. For some time now, there has been inadequate up-to-date information about tourism demand in Zambia. Further, there is also need to appreciate the socio-economic characteristics of both local and foreign tourists that visit our tourism sites and know what story they have to tell about the nature based tourism for the country to be able to realize the tourism vision.

It is against this backdrop that the United Nations Development Programme (UNDP) and the World Bank in conjunction with the Natural Resources Conservation Forum (NRCF) decided to commission a joint study that illuminates the demand side of the nature-based tourism industry. The Nature-based Tourism Demand Survey was purely designed to collect information on international as well as resident tourists' demands ranging from transport needs to medical and telecommunication needs.

1.2 Project Implementation Framework

The study on the impact of tourism on the national economy was identified and commissioned by the NRCF, World Bank and UNDP through a participatory process. The study was conceived from the following 3 out of 6 questions that were raised during a 2004 NRCF organized meeting;

- What is the genuine contribution of protected areas and GMA to economic growth and poverty alleviation?

- What are the total economic values of protected areas and GMA lands?

- How can we define core costs for managing national parks?

As a result of the ensuing discussions, the NRCF was given the mandate to coordinate the study with technical and financial support from the World Bank and UNDP. Effectively, the study commenced with the visit of a World Bank mission from Washington D.C. in August 2005. A series of meetings were held to discuss the financing of the study as well as to identify appropriate national leadership for the survey. A National Survey Consultant was recruited and was immediately tasked to initiate preparatory activities for the study, together with the NRCF Coordinator providing overall guidance and leadership. In terms of institutional arrangements, the nature based Tourism Demand Survey was domiciled at NRCF where office space and conference facilities were made available to a World Bank Specialist and the National Tourism Survey Consultant.

1.3 Objectives of the Study

The overall objective of the Tourism Demand Survey was to design and collect information that would help determine the value of the national parks as well as the magnitude of the current demand for nature-based tourism in Zambia. Specifically, the survey was designed to provide a basis on which to:

- Develop a clear understanding of the socio-economic characteristics of both international and resident Tourists that visit nature-based tourism sites

- Compare tourist's average expenditure incurred within and outside the country

- Ascertain the magnitude of leakages arising from international tourists that travel on packaged tours

- Determine the cost of tourists travel to Zambian nature-based tourism attractions

- Measure the tourist willingness to pay for current and improved recreation services in national parks and waterfalls area
- Determine the true contribution of nature-based tourism to the national economy using multiplier effects
- Determine the direct use-value of the Zambian National Parks and sites that are visited by tourists
- Determine the potential growth of the nature-based tourism if new parks were to be developed for commercial tourism and/or if recreation services were to be improved in the five main parks/sites.
- Determine the magnitude of unmet needs of international tourists who constitute a viable source of foreign exchange for the country.

1.4 Scope of the Study

The Tourism Demand Study was designed to collect information from both the international as well as resident tourists. The survey only covered agreed upon topics of policy relevance. The survey broadly covered the following topics:

(i) The socio-economic characteristics of both international and resident tourists

(ii) General tourist trip information including the cost of travel

(iii) General park or falls visit information and their associated costs for recreational activities

(iv) Tourists perception of the quality of Zambian Parks and falls

(v) The tourists' willingness to pay for current and improved recreational services found in parks and falls areas.

The proposed scope was adequate enough to meet all the data requirements for undertaking an economic impact analysis of tourism and economic evaluation of the nature based tourism sites.

CHAPTER 2: Survey Design Methodology & its Implementation

2.1 Sample Design and Coverage

The Tourist survey covered a probability sample of 1, 578 tourists in both the lodges/hotels and airports out of the expected 1, 800. This represents an under coverage of about 12 percent. The survey was carried out for a period of about 25 days using a cross sectional sample of tourists. The desired sample size was nationally efficient for yielding quite reliable combined as well as sub-group estimates.

The defined target population for the survey consisted of resident and non-resident tourists who had at least visited one nature-based tourism site during the survey reference period. Nature-based tourism sites in Zambia fundamentally include Victoria Falls and the Mosi O Tunya National parks, Lower Zambezi, Kafue, Nsumbu, Lonchivar, Kasanka, Isangano, North and South Luangwa National Parks.

The target tourists were covered in the following sites:

a) International Airports

- Lusaka International Airport, and
- Livingstone International Airport

b) Lodges around National Game Parks

- South Luangwa National Park
- Kafue National Park
- Mosi O Tunya National Park

2.2 Sample Stratification and Selection

For the purposes of this survey, tourists were stratified into internally homogenous categories based on their respective residential status and mode of transport used to visit the country and the sites. This implies that tourists who traveled by air were interviewed at the 2 international airports mentioned above whilst the Over-Landers and 4x4 tourists were covered in their respective lodges/hotel/camps around Livingstone town, Kafue and South Luangwa National Parks. A sample of 1, 800 tourists was allocated to the explicit strata (Airports Versus 4x4 tourists) equally so as to achieve equal precision in the emerging separate estimates. The within stratum allocation of the sample across the airports and lodges, as well as between the 2 types of tourists (Resident versus Foreign Tourists) was approximately proportional.

Table 2.1: Sample Allocation by Site of Interview and Residential Status, November 2005

Site	Number of Visitors	Proportional	Residents	Non Residents
International Airports	**95, 510**	900		
Lusaka	56, 093	538		
Livingstone	37, 875	362		
4x4Lodgers/Over-Landers	119, 394	900	200	700
Livingstone	93, 627	500	100	400
South Luangwa		200	50	150
Kafue		200	50	150

Source: *The 2004 International Visitor Survey Report, MTNR, Zambia*
Note: *Measures of Size for Kafue and South Luangwa National Park are not available.*

Table 2.2 below shows the coverage rates of interviews by location. Overall, the survey achieved a coverage rate of about 88 percent. A good response rate was recorded in airports (98 percent) compared to lodges (77 percent) essentially because of the high turnout of tourists that Livingstone town enjoys throughout the year. Whilst the tourism season is only restricted to the period April to November of every year in other sites, it runs throughout the year in Livingstone town. Tourists were over-sampled in South Luangwa National Park and Livingstone international airport in an attempt of meeting the desired stratum sample sizes (i.e. Airport and the National Park Lodgers).

Table 2.2: Sample Coverage Rates by Location of Interview, November 2005

Site	Ideal sample	Interviews	Response rate
International Airports	900	884	98%
Lusaka	538	424	79%
Livingstone	362	460	127%
4x4Lodgers/Over-Landers	900	694	77%
Livingstone	500	306	61%
South Luangwa	200	248	124%
Kafue	200	140	70%
Total	1, 800	1, 578	88%

2.3 Sample Selection of Tourists

In order to minimize selection bias, the Tourism Demand Survey employed a systematic sample of tourists found in airports and lodges/hotels. In the case of airports, the Interviewer was expected to interview every i^{th} exiting tourist that entered the departure lounge just after immigration clearance. On the other hand, every i^{th} tourist was selected for an interview in the parks using a lodging/bedding list provided by the lodge/hotel Operators. In the case of Kafue and South Luangwa National Parks, the field teams were targeting tourists that were through with their park activities for interviews.
The sampling interval was determined as follows:

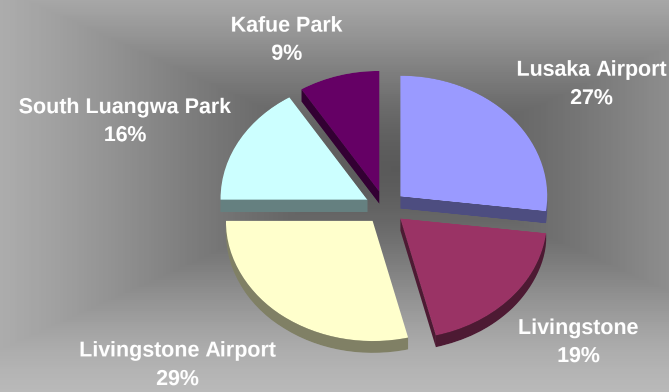
$$(SamplingInterval) = \frac{(AvailablenumberofTourists)}{(\mathrm{Re}\,quiredDailysampleofTourists)}$$

As indicated in table 2.3 and figure 2.1 below, more than half of the respondent tourists were interviewed at the 2 international airports (27 and 29 percent at Lusaka and Livingstone international airports). Slightly over 40 percent of the tourists were interviewed in lodges/hotels around the target tourism sites. These results clearly indicate that similar surveys can be carried out simply by targeting exiting tourists in airports as opposed to covering them in national parks, which poses quite a logistical challenge.

Table 2.3: Percent Distribution of Tourists by Location of Interview and Sex, November 2005

Interview Location	Sex of Tourist			Number of Tourists
	Overall	Male	Female	
Overall	100	100	100	1, 578
Lusaka Airport	27	25	29	424
Livingstone Town	19	22	17	306
Livingstone Airport	29	29	29	460
South Luangwa National Park	16	13	19	248
Kafue National Park	9	11	6	140

Figure 2.1: Percent Distribution of Tourists by Location of Interview, November 2005



2.4 Description of the 4 Main National Parks: Where does the Tourists go?

Recent studies indicate that the majority of Tourists particularly international holidaymakers come to Zambia mainly for the purpose of viewing wildlife in National Parks and the Victoria Falls in Livingstone town. The most popular tourist destinations in Zambia include the Victoria Falls together with the Mosi O Tunya National Park, the Lower Zambezi National Park, the South Luangwa National Park and finally the Kafue National Park. Other sites that are targets for the tourists include the North Luangwa National Park, the Nsumbu National Park together with the Lake Tanganyika and Kasanka National Park. Each of these natural sites has unique features that are at the very pinnacle of tourism attraction. This report attempts to provide descriptions of the four selected sites for the study.

2.4.1 The Victoria Falls and the Mosi O Tunya National Park

The Livingstone town is one of the major cities in Zambia. The town was named after the Scottish Explorer David Livingstone. Livingstone town is home to the Mosi O Tunya National Park and one of the most spectacular falls in the world, the Victoria Falls. The wide basalt cliff over which the falls thunders measures nearly 2 kilometers in width and over 100 metres deep. Heavy sprays of water particularly during the flood season can be seen miles away as 546 million cubic meters of water per minute plummet over the edge of the cliff. When tourists are in the falls area they have an opportunity to walk through the water-spray forest and across the Knife Edge Bridge that offers a better panoramic view of the falls.

Apart from the falls, the town also boasts of the Mosi O Tunya National Park that has a variety of wildlife. The Park was named after the Kololo tribe description of the waterfalls on the Zambezi River. Mosi O Tunya means “the smoke that thunders”. The park is situated along the upper Zambezi stretching from and including the falls for about 12 kilometers up the river. The Mosi O Tunya Park measures only about 66 square kilometers but is home to numerous antelope species, Zebra, Giraffe and white Rhinos. Game viewing in the Park can either be done through boat cruises on the Zambezi River, safari drives or through Elephant back safari.

Whilst in Livingstone town, tourists can go sightseeing to the Victoria Falls Bridge, Mukuni Cultural Village and the Livingstone Island. David Livingstone had his first glimpse of the falls from this same Island as far back as 1855. Further, the Victoria Falls area has of late become the adventure center of Southern Africa. The falls and the mighty Zambezi river also provide spectacular adventurous activities to various tourists including bungi Jumping, whitewater rafting, canoeing, river boarding, abseiling, tandem kayaking, jet-boating, river safaris, surfing, microlighting and helicopter flights.

2.4.2 Lower Zambezi National Park

The Lower Zambezi national Park is one of the most spectacular parks in Africa where visitors have a chance to get close to various types of wildlife that wonder around in a place that has been spared from the problems of modernization. The beauty of the park lies in its state of absolute wilderness. The park lies opposite the famous Mana Pools Reserve in Zimbabwe, making the whole area on both sides of the Zambezi River stand as a massive wildlife sanctuary. The Lower Zambezi National Park is accessible mainly by air through the Lusaka international airport and by river. Since the park is undeveloped, accessibility by road is yet to be fully developed. However, some tourists particularly the 4X4 ones have been going to the park by road. Usually the tourism lodge Operators in the area prefer to make transport arrangements for the tourists.

Located on the southern part of Lusaka province valley area, the Lower Zambezi National Park covers an area of about 4092 square kilometers. The area has a high concentration of wildlife and birdlife along the valley floor. The park is mainly home to elephants, buffaloes, zebras, hippos, waterbucks, kudu and other common antelopes found in Zambia. The park also hosts a good number of predator Cats (lions and leopards). The birdlife along the riverbanks is exceptional. Many a fish eagle can be seen and heard many miles away.

Whilst in the park, tourists are expected to see enormous herds of elephants and other wildlife amongst a profusion of birdlife. The mighty Zambezi River just adds value and fun to the stay as tourists can engage in various river activities such as fishing, canoeing and boat cruises. Because of the poor state of the road to the Lower Zambezi National Park, the majority of the tourists that visit the park travel using light aircrafts.

2.4.3 South Luangwa National Park

Many Commentators have labeled South Luangwa National Park as one of the greatest wildlife sanctuaries in the world. The concentration of game around the Luangwa River and its ox bow lagoons is among the most intense in Africa. The Luangwa River is the most intact river system in Africa and constitutes the lifeblood of the park, which measures about 9, 050 kilometers squared. The famous walking safari originated in this park and is still one of the finest ways to experience this pristine wilderness first hand.

There are about 60 different animal species and over 400 different bird species in the park. The only notable exception is the Rhino, which has sadly been poached to extinction. Whilst in the South Luangwa National Park, tourists are expected to view bursting numbers of hippos in the dambos and huge herds of elephants in the valley plains. In addition to these animals, there are about 14 species of antelopes in the park of which the eland is the largest. The park further boasts of plentiful predators including the lions and leopards and tourists in most cases experience live kills mainly by hungry Lions. Birdwatching in the South Luangwa National Park particularly during the end of the dry season can be quite spectacular, as tourists have the chance to view over 400 bird species with varying attributes in one place.

The park is accessible by both road and air transport. The Mfuwe airport recently attained international status with the onset of direct flights from Lilongwe in Malawi and chartered flights from all over the world. Mfuwe part of the park is also a major destination for the over landing truck and 4x4 tourists. The majority of foreign tourists come to Mfuwe through Lusaka where they connect on domestic flights, which are on a daily basis especially during the peak of the tourism season.

2.4.4 Kafue National Park

The Kafue National Park (KNP) is the oldest and largest park in Zambia covering about 22, 400 kilometers squared. This land mass is about 35% of the country’s total national park estate. The park, which is approximately the size of Wales, is the second largest national park in the world. Despite it’s proximity to Lusaka and Copperbelt provinces, the park’s abundant and varied natural attributes and character have remained fairly intact. The park offers excellent game viewing, birdwatching and fishing opportunities.

Whilst in the park, tourists are in sight with one of the most spectacular wildlife and birdlife in the world. The KNP is endowed with a full menu of antelope, elephants, buffaloes, hippos, red lechwes, and prime predators including lions, solitary leopards and cheetahs. There are over 400 species of birds throughout the park. Birdwatching particularly along the river and dambos is just superb. Fishing opportunities especially on the Kafue and Lunga Rivers just spices up the experience in the park. The park that only has one privately owned airstrip is mainly accessible by road especially from Lusaka.

2.4.5 Other Natural Sites

In addition to the above sites, the country is also home to a number of national parks that have potential for tourism growth. These include the North Luangwa, Kasanka and Nsumbu National Parks and Lake Tanganyika and Kariba on the other hand. The North Luangwa National Park remains one of the most natural parks in the country and provides an ideal sanctuary to the black rhino, which was almost extinct. There has been very little human related developments in the areas, leaving the site in it's original natural form. The park has one of the most spectacular wildlife setting perhaps second to none.

Lake Tanganyika is the second deepest fresh water lake in the world only second to Lake Baikal of Russia. Lake Kariba is also the second largest manmade lake in the world only second to lake Niagara of Brazil.

2.5 The Tourists Point of Entry and Travel Pattern

2.5.1 Lusaka International Airport

The Lusaka International Airport (LIA) is the main point of entry for the majority of foreign tourists that come to Zambia. The airport is the biggest in the country and is capable of landing huge aircrafts from all over the globe. The majority of the tourists have the choice of connecting to the Lower Zambezi National Park, South Luangwa National Park and Livingstone town either by air or road. Tourists can also travel to Kafue National Park by road as well as by air from Lusaka. Due to increases in the traffic of tourists, the National Airport Corporation (NAC) has introduced a number of domestic flights that normally service foreign as well as local tourists. The majority of the tourists enter Zambia through Lusaka international airport via South Africa. The airport also has direct flights to Europe and a number of African countries including South Africa, Malawi, Zimbabwe, Kenya and Ethiopia.

2.5.2 Livingstone International Airport

The other airport that caters for immense tourist's arrivals is the Livingstone International Airport. The airport has been expanded due to the drastic increase in the number of foreign tourists that come to view the Victoria Falls and the Mosi O Tunya National Park. These sites are open to tourism throughout the year. The airport has at least 3 international flights per day during the peak tourism season, which stretches from April to November of every calendar year. The majority of the tourists that come to Livingstone by air either originate from South Africa or travel via South Africa.

2.5.3 Border Entries

A significant proportion of the foreign tourists that visit Zambia come by road. Basically, these comprise the 4x4 and overlanding truck tourists. The busiest tourism border entry points lie in the southern part of the country. These include Katima Mulilo, Kazungula and Chirundu border posts. The majority of the tourists that enter the country through these points originate from either South Africa, Namibia or Botswana. Other border entry points that service 4x4 tourists and truck Over-Landers include Mwami and Nakonde border posts, which are located in the eastern and North eastern part of the country. Normally, tourists that enter the country through Mwami border post come from Malawi and end up going to South Luangwa National Park while those that enter through Nakonde come from Kenya and Tanzania and would visit several game parks in Zambia.

A good proportion of these tourists visit Zambia as part of their travel package. This implies that they would first visit other tourism sites in other countries before coming to Zambia. Livingstone town is one of the main destinations for the 4x4 and overlanding tourists particularly those coming from South Africa.

CHAPTER 3: Overview of the Tourists in Zambia

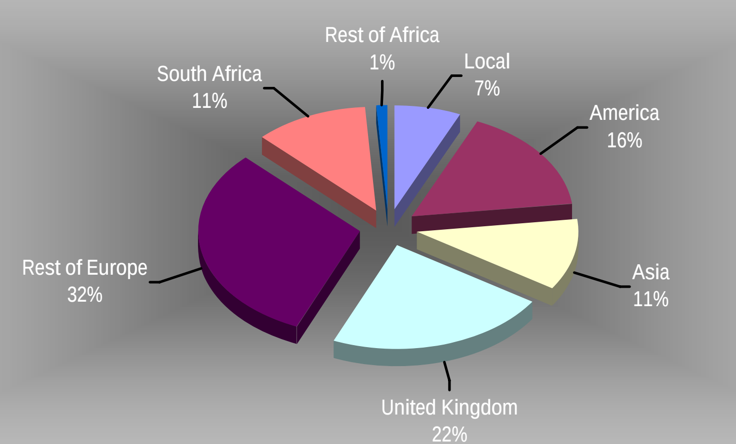
3.1 Origins of the Tourists: Where do Tourists come from?

Of late, tourism in Zambia has acquired markets in all the 7 continents on planet earth. The increase in the number of tourists that visit the country from all over the globe can partly be attributed to the peace and tranquility that the country has continued to enjoy since independence. For the purposes of this report, North and South America on one hand, and Australia and Asia on the other hand have simply been collapsed into America and Asia.

As indicated by figure 3.1, tourists that visited the country during the month of November came from all the 7 continents of the world. The majority of the tourists that at least visited one of the target tourism sites came from Europe (53 percent), followed by America (16 percent), Asia and South Africa, at 11 percent each. Domestic tourists only accounted for a paltry 7 percent while other African countries recorded the least proportion of tourists, at 1 percent.

These results point to the need to intensify marketing programmes of our tourism sites especially in Asia/Australia and America since these regions constitute potential tourism markets necessary for tourism growth. Further, the results also epitomizes the need to open up tourism to the average Zambians by implementing policies and programmes that promote local tourism growth.

Figure 3.1: Percent Distribution of Tourists by Place of Origin, November 2005



3.2 The Sex and Age Composition of the Tourists

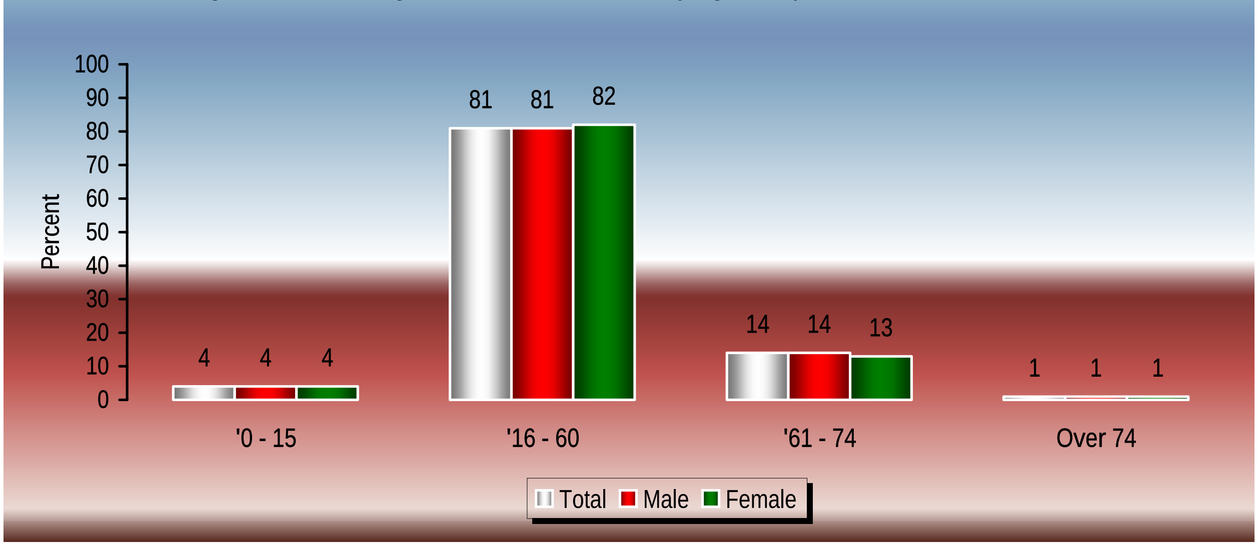
Results in table 3.1 and figure 3.2 show the distribution of respondent tourists together with their travel companion by age group, sex and place of origin. The survey reveals no major sex differences in the distribution of tourists by age. Female tourists accounted for 49 percent of the total number of Visitors that were sampled. The majority of tourists that visited our natural sites were adults falling in the active age range 16 to 60 years. Overall, only 4 percent of children aged 0 – 15 years had visited the four sites during the month of November. On the other hand, about 15 percent of the elderly tourists (those aged 61 years and above) had visited the same sites.

These results to some extent demonstrate the need for tourism promotional programmes that encourage foreign as well as local tourists to bring along their children to our amazing tourism sites. There is need for tourism operators to demonstrate beyond any reasonable doubt that children's safety in and around the national parks is guaranteed.

Table 3.1: Percentage Distribution of Tourists by Age Group, Sex and Place of Origin, November 2005

Sex and Place of Origin	Age of Tourist					Sample of Tourists
	0 - 15	16 - 60	61 - 74	Over 75	Total	
Overall	4	81	14	1	100	5, 414
Sex						
Male	4	81	14	1	100	2, 788
Female	4	82	13	1	100	2, 626
Place of Origin						
Within Zambia	11	87	2	1	100	366
North America	4	71	23	2	100	877
Asia	3	85	12	1	100	610
United Kingdom	4	81	13	1	100	1194
Rest of Europe	3	83	13	2	100	1695
South Africa	2	94	4	0	100	609
Other African countries	3	86	11	0	100	53
Other	9	82	0	9	100	11

Figure 3.2: Percentage Distribution of Tourists by Age Group and Sex , November 2005



3.3 Size of the Tourist Party

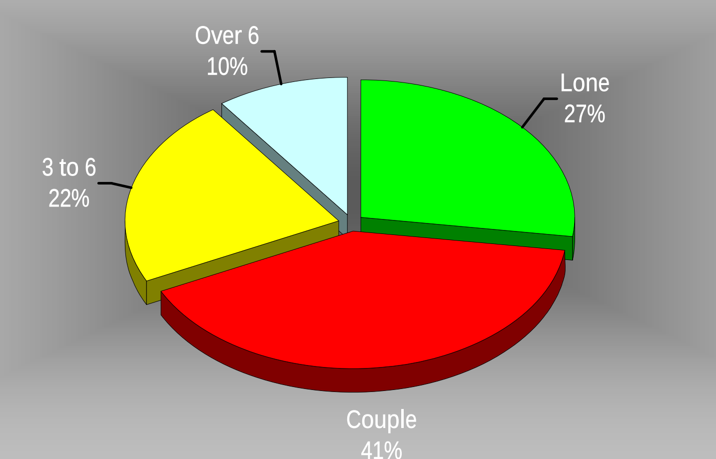
Results from similar Tourism Demand Studies show that the majority of tourists prefer to travel to various destinations with companions. Table 3.2 and figure 3.3 shows the distribution of tourists by size of their entourage. On average, tourists traveled to Zambia in groups of 3 persons. However, the average size of entourages originating from Asia, South Africa and the larger part of Europe was 4 persons. Further distribution of tourists by size of their entourage shows that the majority traveled as couples (41 percent). Another 22 percent of tourists traveled in entourages consisting of 3 to 6 persons. About 10 percent of the tourists traveled in groups of more than 7 persons. Solitary tourists accounted for slightly over one quarter of the tourists (27 percent).

These results indicate that the majority of the tourists particularly those coming from Asia, rest of Europe and South Africa, prefer traveling in larger and sociable groups. An increase in the influx of larger tourists groups is definitely desirable for tourism growth in Zambia since these are associated with more foreign exchange earnings. Therefore, marketing and promotion of holiday and tour packages that encourage companion traveling is one way of facilitating the growth of the sector.

Table 3.2: Percentage Distribution of Tourists by Size of Entourage and Place of Origin, November 2005

Place of Origin	Size of Entourage					Average size of the Tour	Number of Tourists
	Lone Tourist	2 Tourists	3 – 6 Tourists	Over 6 Tourists	All		
Total	27	41	22	10	100	3	1,557
Zambia	27	27	39	7	100	3	114
North America	31	41	17	11	100	3	254
Asia	27	39	23	11	100	4	146
United Kingdom	25	45	23	7	100	3	416
Rest of Europe	25	43	20	13	100	4	460
South Africa	31	30	23	16	100	4	141
Rest of Africa	46	19	31	4	100	2	26

Figure 3.3: Percentage Distribution of Tourists by Size of Entourage, November 2005



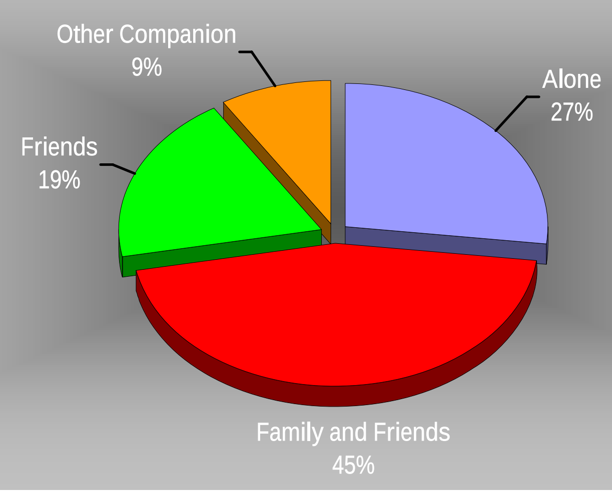
Further analysis of companion travelers indicate that the majority of the tourists that were interviewed traveled with family and friends, at 45 percent, followed by those that traveled with only friends (19 percent). Some of the tourists that visited Zambia (nearly one in every 10) were in the company of workmates and strangers, particularly those that were traveling on organized tour packages. Nearly one fifth of the tourists from South Africa traveled with non-family members and friends (Refer to table 3.3 and figure 3.4).

Once again, these findings illustrate the need to encourage more companion travelers perhaps through the promotion of discounted tour packages for larger groups of tourists. Indeed, the number of tourists is more likely to increase if travelers are offered family/companion travel packages that are economical or easy on their pockets.

Table 3.3: Percentage Distribution of Tourists by Travel Companion and Place of Origin, November 2005

Place of Origin	Tourists Travel status					Average size of the Tour	Number of Tourists
	Traveling Alone	Traveling with Family and friends	Traveling with Friends	Traveling with Others	All		
Total	27	45	19	9	100	3	1,557
Zambia	27	39	25	9	100	3	114
North America	32	43	16	9	100	3	254
Far East Asia	26	44	22	9	100	4	146
United Kingdom	25	50	17	8	100	3	416
Rest of Europe	25	46	21	8	100	4	460
South Africa	31	34	16	19	100	4	141
Other African Country	48	28	16	8	100	2	26

Figure 3.4: Percentage Distribution of Tourists by Travel Companionship, November 2005



3.4 Socio-economic Characteristics of the Tourists

Results from the tourism demand survey reveal that the majority of the tourists that visit Zambian tourism sites can largely be described as fairly educated and working class holidaymakers. This implies that these are clients that cannot be taken for granted when it comes to issues of value for money and tourism economies of scale.

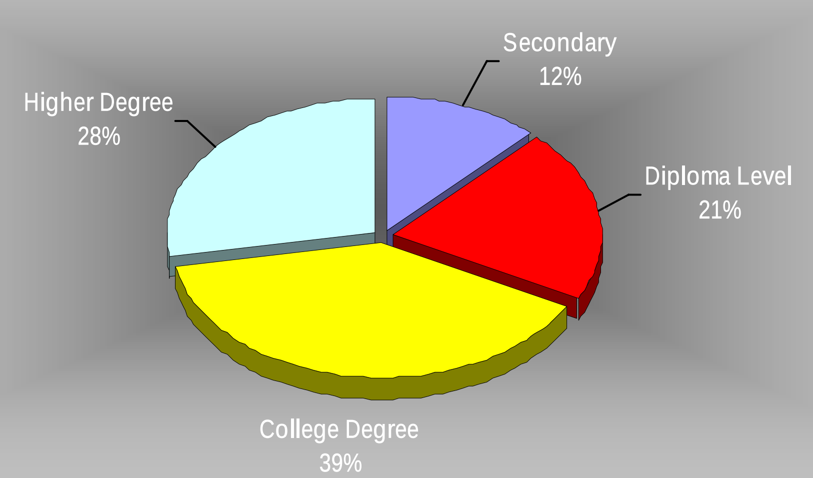
According to table 3.4 and figure 3.5, about two-thirds of the tourists that were interviewed during the survey period had at least a college degree. Only 33 percent of the tourists had reported to have a diploma and below. Specifically, out of the 114 local tourists that were interviewed, 70 percent had college degree and above as their educational attainment. This implies that local tourism has continued to be a domain for the well educated and powerful in Zambian society.

Generally, these findings suggest that travelers with higher education attainments are more likely to visit nature-based tourism sites than those with poor education achievements. Further, this pattern could also be as a result of the fact that nature-based tourism has since time memorial been appreciated more by those individuals who are erudite and affluent in society. Therefore, the linkage between education and tourism growth need not to be over emphasized.

Table 3.4: Percentage Distribution of Tourists by Educational Level completed and Place of Origin, November 2005

Place of Origin	Educational level Completed					Number of Tourists
	Secondary and Below	Professional/ Diploma Level	College Degree	Higher Degree	All	
Total	12	21	40	28	100	1,557
Zambia	11	18	41	29	100	114
North America	9	13	46	31	100	254
Far East Asia	14	25	41	20	100	146
UK/Scotland/Ireland	15	22	39	24	100	416
Rest of Europe	9	21	37	33	100	460
South Africa	14	23	40	23	100	141
Other African Country	4	27	42	27	100	26

Figure 3.5:Percentage Distribution of Tourists by Educational Level completed, November 2005



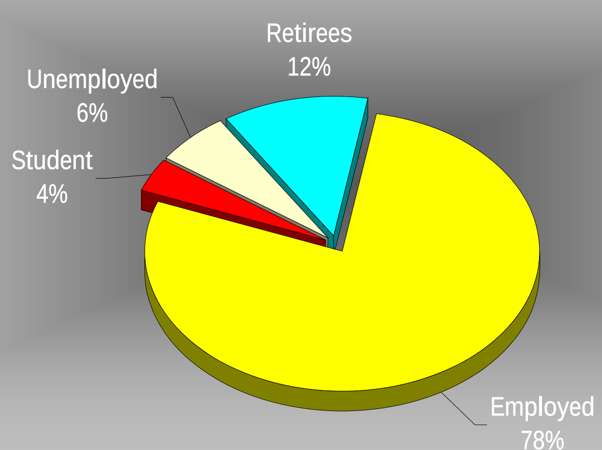
Conversely, table 3.5 and figure 3.6 show the distribution of respondent tourists by employment status and place of origin. Results indicate that more than three-quarters of the respondent tourists were in employment (both part-time and full-time). Retirees or pensioners constituted 12 percent of the holidaymakers while the unemployed and students accounted for 6 and 4 percent of the tourists, respectively.

These results illuminate the importance of employment for tourism growth since by expectation, a decline in employment would lead to a decline in tourism turnout. In addition, these findings also suggest the need to have tourism promotions that target the retirees since they are potential candidates for tourism expansion in the country.

Table 3.5: Percentage Distribution of Tourists by Employment Status and Place of Origin, November 2005

Place of Origin	Employment Status					Number of Tourists
	Employed	Student	Unemployed/ Inactive	Retired/ Pensioners	All	
Total	78	4	6	12	100	1,557
Zambia	86	4	8	2	100	114
North America	73	4	6	16	100	254
Far East Asia	75	3	10	12	100	146
UK/Scotland/Ireland	75	2	6	17	100	416
Rest of Europe	80	6	3	11	100	460
South Africa	82	4	9	5	100	141
Other African Country	88	4	4	4	100	26

Figure 3.6: Percentage Distribution of Tourists by Employment Status, November 2005



3.5 Travel Status of Foreign Tourists in Sub-Saharan Africa

The majority of the foreign tourists that were interviewed during the study are well traveled in the Sub-Saharan Africa. Results in table 3.6 show that 90 percent of the tourists that were interviewed had visited at least one country in the Sub-Saharan Africa. This was more of a case among tourists that came from South Africa, America and Asia. This clearly indicates how important the region has become as one of the major tourism destination.

These findings also establish the point that as a country there is need to competitively maintain a good market share in the region by way of offering travelers attractive and easy-on-the-pocket tour packages that are second to none. There is need to open up more tourism sites and improve on the variety of tourism activities if the country has to remain a major tourist destination in Africa.

Table 3.6: Percentage Distribution of Foreign Tourists by Visit Status to Sub-Saharan Countries and Place of Origin, November 2005

Place of Origin	Sub-Saharan Visit Status			Number of Tourists
	Visited	Not Visited	Total	
Overall	90	10	100	1, 422
America	91	9	100	248
Asia	90	10	100	145
UK/Scotland/Ireland	89	11	100	409
Rest of Europe	87	13	100	455
South Africa	95	5	100	139
Other African Country	100	-	100	26

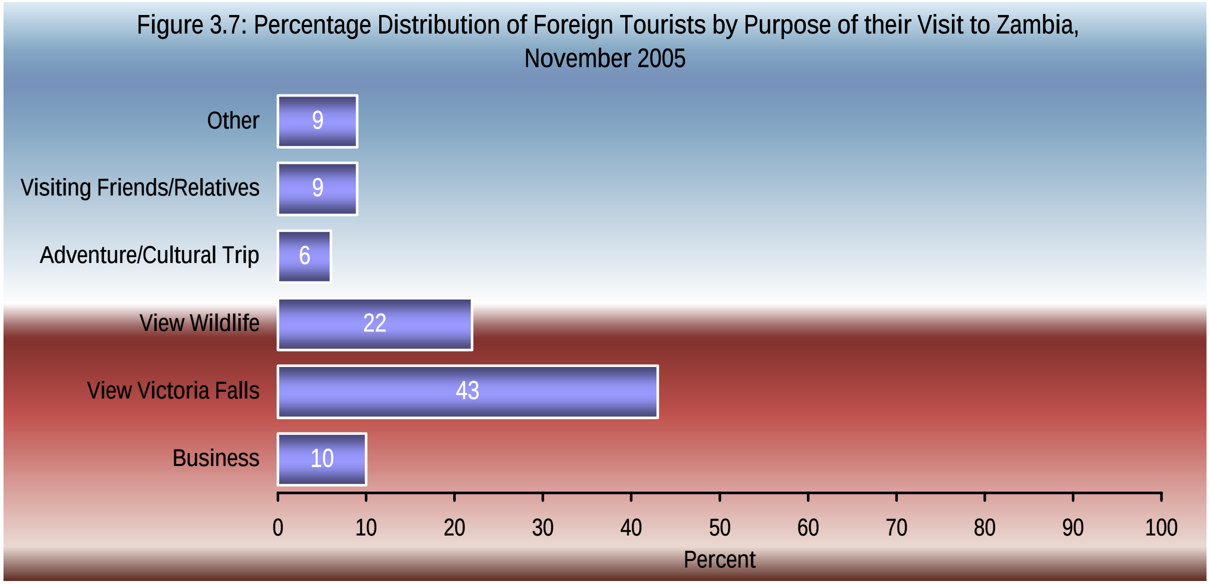
3.6 Foreign Tourists by Purpose of Visit to Zambia

As stated earlier, most of the tourists come to Sub-Saharan Africa to visit nature based tourism sites. Undeniably, table 3.7 shows that the majority of the foreign tourists that were interviewed during the study chiefly traveled for the purpose of viewing the Victoria Falls (43 percent), followed by wildlife viewing (22 percent). Another 10 percent of the tourists traveled to Zambia purely for business purposes. Other tourists chose to come to Zambia principally for visiting friends and relatives (9 percent) and as part of their adventure/cultural trip (6 percent). Nearly 1 in every ten tourists also came to Zambia for other reasons.

Nearly half of the tourists from America and over 40 percent of the travelers from United Kingdom, South Africa and Asia had visited the country chiefly for viewing the mighty Victoria Falls. Wildlife viewing also accounted for a significant proportion of tourists of Europeans, Asian, American and South African origins. These results show that most of the tourists visit Zambia purely for purposes of viewing the falls and wildlife in the game parks.

Table 3.7: Percentage Distribution of Foreign Tourists by Purpose of their visit to Zambia and Country of Residence, November 2005

Place of Origin	Purpose of Visit							Number of Tourists
	Business	View Victoria Falls	View Wildlife	Adventure Cultural Trip	Visiting Friends Relatives	Other	All	
Total	10	43	22	6	9	9	100	1422
North America	14	49	17	5	6	10	100	248
Far East Asia	10	42	18	10	8	12	100	145
UK/Scotland/Ireland	6	45	26	6	8	8	100	409
Rest of Europe	7	39	25	6	12	9	100	455
South Africa	19	44	17	3	9	9	100	139
Other African Country	27	15	15	15	23	4	100	26



3.7 Number of Visits to Zambia in the last ten years

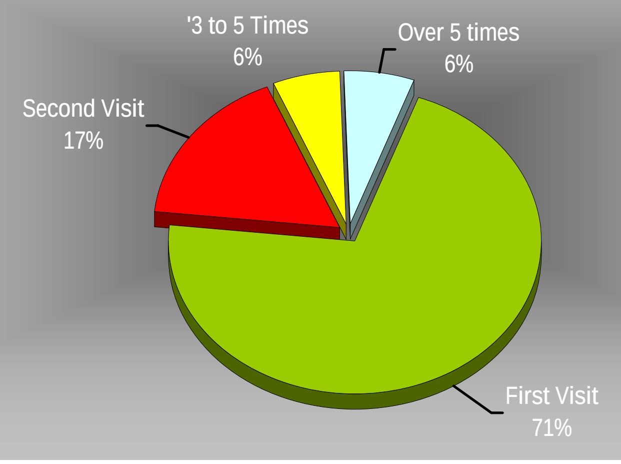
During the Tourism Demand Survey tourists were asked to indicate their number of visits to Zambia in the last ten years. Results in table 3.8 and figure 3.8 show that the majority of the tourists had just made their first visit to Zambia. Nearly three-quarters of the tourists (71 percent) had visited Zambia for the first time in their lives. Almost 1 in every 5 tourists that were interviewed reported that they were on their second visit to Zambia (17 percent). Another 12 percent of the tourists had visited Zambia more than 2 times in the past ten years. Notable from table 3.8 is the relatively larger percentage of tourists from within Africa with more than 2 visits to Zambia.

The high proportion of first comers particularly from Europe, America and Asia can be attributed to the outstanding Visit Zambia Campaign, which was launched by the Zambia National Tourism Board (ZNTB) in 2005. The campaign endeavored to market Zambia worldwide as a real African destination full of mesmerizing natural wonders that primarily include waterfalls and wildlife.

Table 3.8: Percentage Distribution of Foreign Tourists by Number of Visits to Zambia in the last 10 years and Country of Residence, November 2005

Place of Origin	Number of visits to Zambia					Number of foreign Tourists
	Once	Twice	3 to 5 times	Over 5 times	All	
Total	71	17	6	6	100	1422
North America	76	17	5	2	100	248
Far East Asia	72	21	4	3	100	145
UK/Scotland/Ireland	76	13	4	7	100	409
Rest of Europe	73	17	6	4	100	455
South Africa	42	25	15	18	100	139
Other African Country	42	27	4	27	100	26

Figure 3.8: Percentage Distribution of Foreign Tourists by Number of Visits made to Zambia in the last 10 years, November 2005



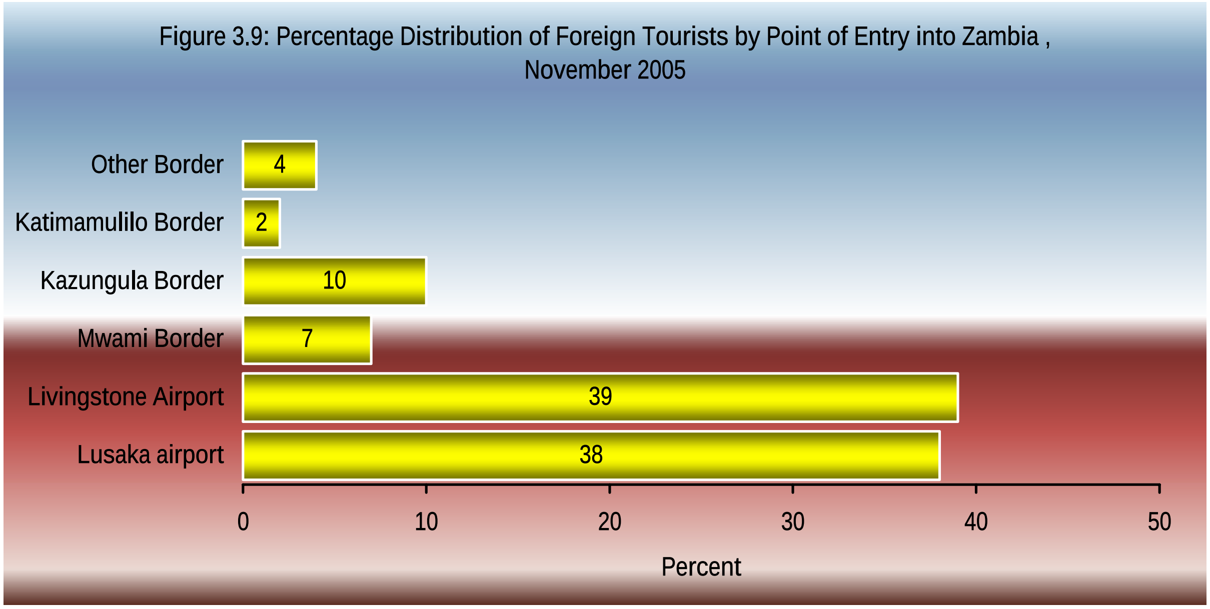
3.8 Major Tourist Points of Entry

Table 3.9 and figure 3.9 show the distribution of respondent tourists by point of entry into Zambia. Results indicate that the majority of the foreign tourists entered the country through Livingstone and Lusaka international airports, at 39 and 38 percent respectively. This implies that most of the foreign tourists come to Zambia using air transport. Another 23 percent of the tourists entered Zambia through border areas, of which Kazungula in Southern province and Mwami in Eastern province accounted for 10 and 7 percent, respectively. The remaining tourists used other border areas including Nakonde in Northern province and Kasumbalesa in Copperbelt province. Livingstone international airport has of late become a major point of entry for foreign tourists most especially those coming from South Africa (51 percent), America (45 percent) and Asia (37 percent).

These results point to the need to improve on the immigration and customs clearance systems that are available in the main points of entry into the country. One way of doing this is by establishing a tourism desk for purposes of accelerating entry and exit immigration clearance for foreign tourists.

Table 3.9: Percentage Distribution of Foreign Tourists by Point of Entry into Zambia and Country of Residence, November 2005

Place of Origin	Point of Entry						All	Number of Tourists
	Lusaka airport	Livingstone airport	Mwami border	Kazungula Border	Katimamulilo Border	Other Borders		
Total	38	39	7	10	2	4	100	1422
North America	33	45	7	10	3	2	100	248
Far East Asia	26	37	15	12	1	9	100	145
UK/Scotland/Ireland	46	41	4	6	1	2	100	409
Rest of Europe	38	33	9	14	2	3	100	455
South Africa	30	51	1	11	-	7	100	139
Other African Country	42	12	12	4	4	27	100	26

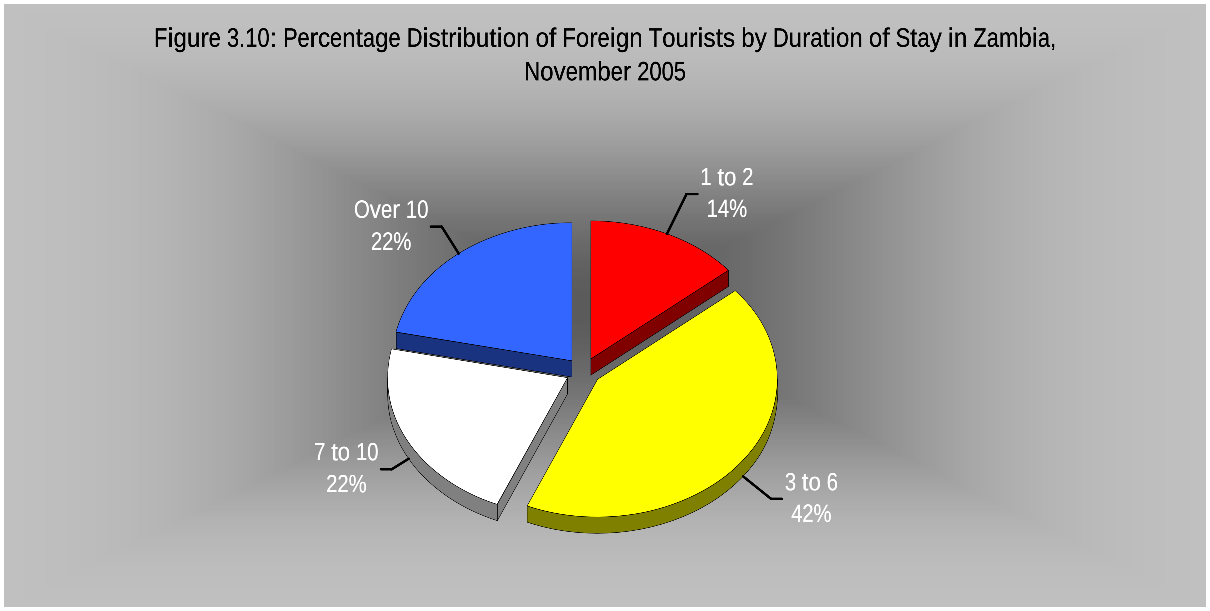


3.9 Duration of Stay in Zambia

The length of stay in the country by foreign tourists is one of the proxy indicators of tourists satisfaction. Results in table 3.10 and figure 3.10 show that the majority of the foreign tourists spent a minimum of a week in Zambia. About 44 percent of the tourists that were interviewed spent more than 6 days in Zambia. A fairly large percentage of tourists (43 percent) stayed in Zambia for 3 to 6 days. Only 14 percent of the tourists spent less than 3 days in Zambia. It is important to note that nearly one in every four tourists from Europe spent over 10 days in the country compared to say one in every ten South African tourists.

Table 3.10: Percentage Distribution of Foreign Tourists by Duration of Stay in Zambia and Country of Residence, November 2005

Place of Origin	Duration of Stay in Zambia					Number of foreign Tourists
	1 to 2 Days	3 to 6 Days	7 to 10 days	Over 10 Days	All	
Total	14	43	22	22	100	1422
North America	16	49	17	18	100	248
Far East Asia	22	38	19	21	100	145
UK/Scotland/Ireland	12	38	27	22	100	409
Rest of Europe	14	40	19	27	100	455
South Africa	6	63	22	8	100	139
Other African Country	8	33	25	33	100	26

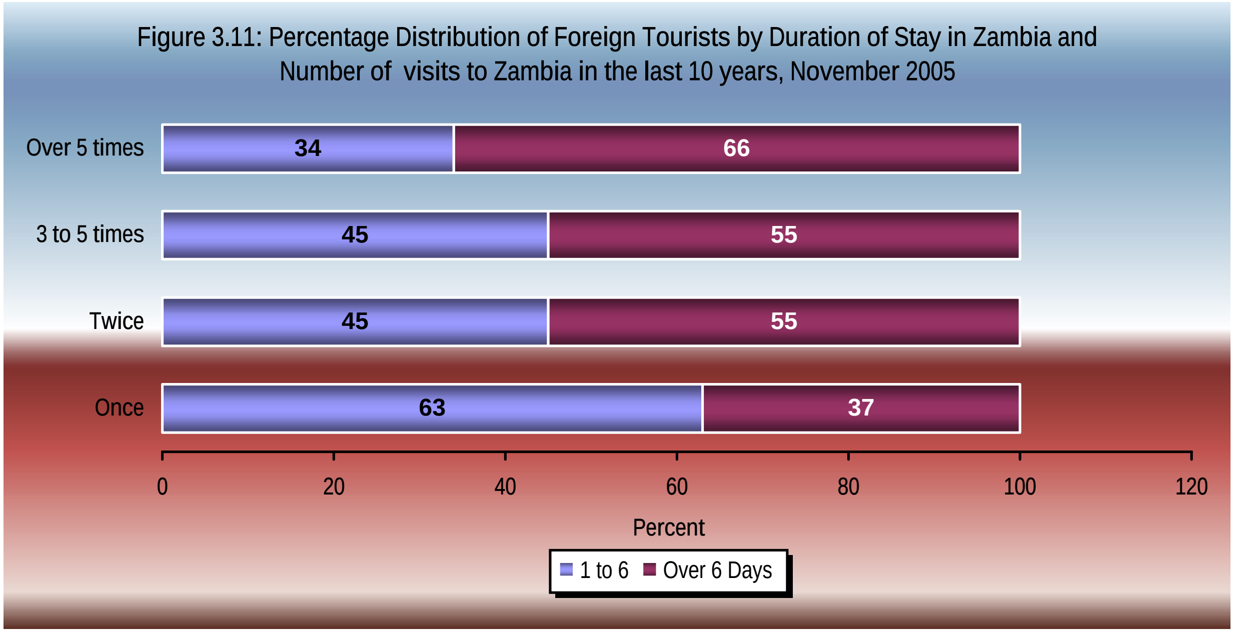


Further analysis of foreign tourists duration of stay by their visitation status in the last ten years reveals an increase in the number of days spent in Zambia as the frequency of visits increase. For instance about 40 percent of the foreign tourists that have been to Zambia for over 5 times in the last ten years spent over 10 days in the country compared to only 17 percent of those making their maiden trip. Generally, results in table 3.11 show that more than half of the Return-tourists had spent at least a week in the country during their visit.

It is perfectly in order to conclude that returning tourists are more likely to spend more days in Zambia than First-Time Visitors probably because they have become more familiar and knowledgeable about the country as a whole. These results also point to the need to open up more tourism sites within the country that have capabilities of meeting tourists wide-ranging expectations in a single destination trip (Refer to table 3.11 and figure 3.11).

Table 3.11: Percentage Distribution of Foreign Tourists by Duration of Stay in Zambia and Number of Visits to Zambia, November 2005

Number of visits in the last 10 years	Duration of Stay in Zambia					Number of foreign Tourists
	1 to 2 Days	3 to 6 Days	7 to 10 days	Over 10 Days	All	
Total	14	43	22	22	100	1421
Once	15	48	20	17	100	1007
Twice	14	31	25	30	100	242
3 to 5 Times	6	39	25	30	100	83
Over 5 Times	7	27	26	40	100	89



In addition, the Tourism Demand Survey results have also shown that solitary travelers are more liable to spend more days in Zambia than those traveling with family/friends. As indicated in table 3.12 and figure 3.12, more than half of the lonely travelers (52 percent) spent at least one week during their visits to Zambia compared to about one third of the tourists traveling with their families and friends (37 percent). In addition, about 45 percent of the tourists exclusively in the company of friends had spent at least a week in Zambia during their stay. These results imply that smaller groups of tourists especially those in the company of non-family members are more likely to spend more days in the country than say bigger groupings of travelers.

Table 3.12: Percentage Distribution of Foreign Tourists by Duration of Stay in Zambia and Travel Status to Zambia, November 2005

Travel Status	Duration of Stay in Zambia					Number of foreign Tourists
	1 to 2 Days	3 to 6 Days	7 to 10 days	Over 10 Days	All	
Overall	14	43	22	22	100	1,397
Traveling Alone	13	35	23	29	100	377
Traveling with Family and Friends	16	47	20	17	100	630
Traveling with Friends	12	43	22	24	100	260
Traveling with Others	12	52	24	12	100	130

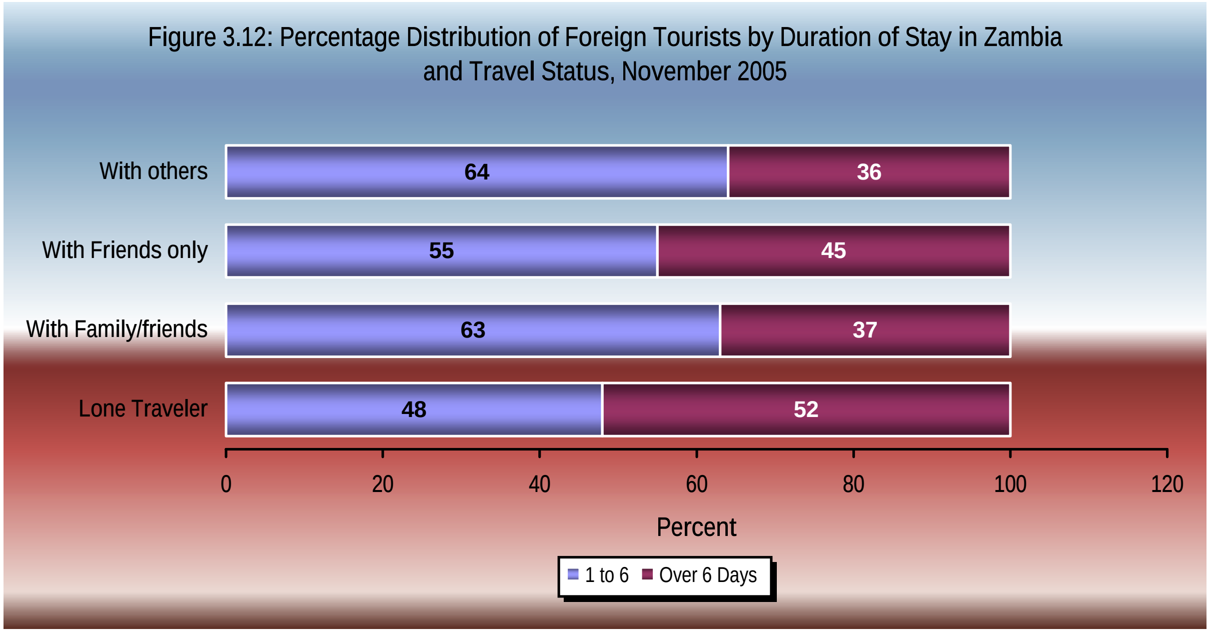
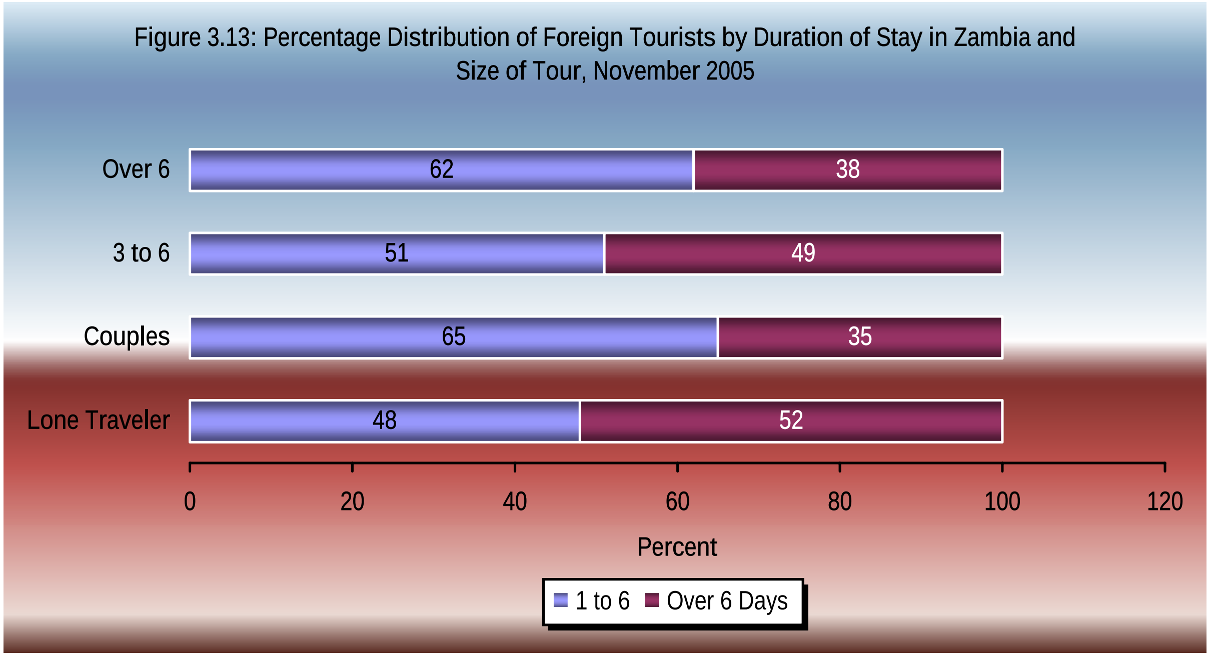


Table 3.13 and figure 3.13 below show the distribution of tourists by size of their tour parties and duration of stay in Zambia. Once again results clearly indicate that smaller groups of travelers, especially solo tourists tend to spend more days in Zambia than bigger groups of tourist; hence the need to establish and promote family/companion tour packages that are affordable despite the extended duration of stay.

Table 3.13: Percentage Distribution of Foreign Tourists by Duration of Stay in Zambia and Travel Status to Zambia, November 2005

Size of Tour	Duration of Stay in Zambia					Number of foreign Tourists
	1 to 2 Days	3 to 6 Days	7 to 10 days	Over 10 Days	All	
Overall	14	43	22	21	100	1397
Single Tourist	13	35	23	29	100	377
2 Tourists	17	48	18	17	100	630
3 to 6 Tourists	10	41	26	23	100	260
7 and Over	11	51	23	15	100	130

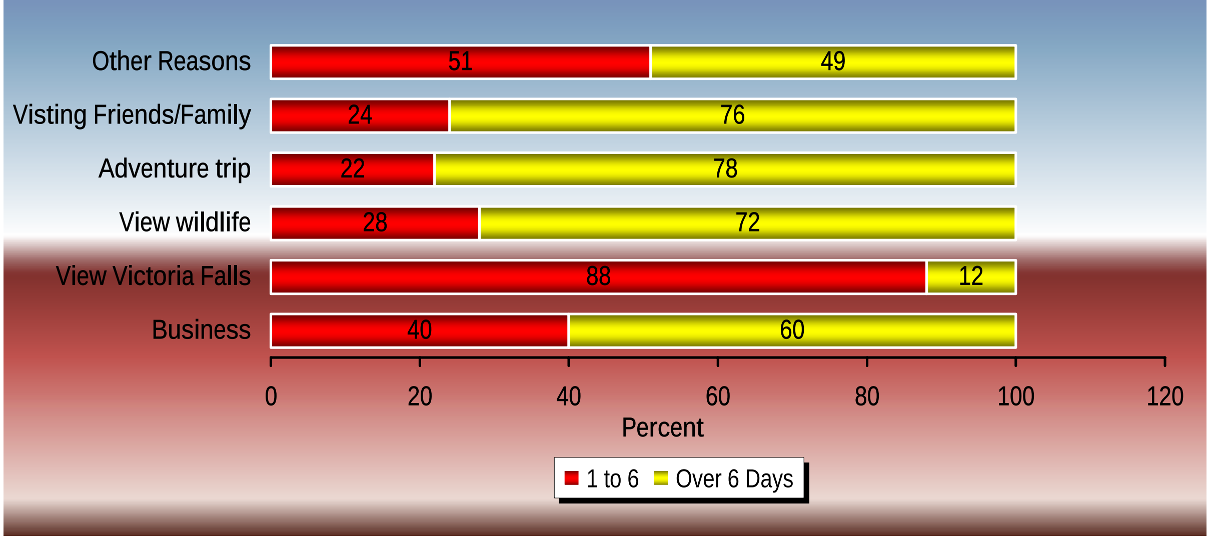


Further analysis of the duration of stay by purpose of visit to Zambia shows that the majority of tourists on Cultural/Adventure trip and those that come to visit friends/family and view wildlife tend to spend more days in the country than those that visit Zambia for the purpose of viewing the Victoria Falls and doing business. These results point to the need to diversify and introduce more tourism activities in Livingstone area so that tourists are able to spend more days in the area (Refer to table 3.14 and figure 3.14).

Table 3.14: Percentage Distribution of Foreign Tourists by Duration of Stay in Zambia and Purpose of Visit to Zambia, November 2005

Purpose of visit to Zambia	Duration of Stay in Zambia					Number of foreign Tourists
	1 to 2 Days	3 to 6 Days	7 to 10 days	Over 10 Days	Total	
Overall	14	43	22	22	100	1402
Business/Conference	13	27	28	32	100	137
View Mosi O Tunya falls	25	63	7	5	100	613
View Wildlife in Parks	3	25	39	32	100	312
Adventure/Cultural Trip	4	18	34	44	100	82
Visiting Family/Friends	2	22	27	49	100	129
Other reasons	7	44	31	18	100	129

Figure 3.14: Percentage Distribution of Foreign Tourists by Duration of Stay in Zambia and Purpose of Visit to Zambia, November 2005



3.10 Foreign Tourists and Travel Packages

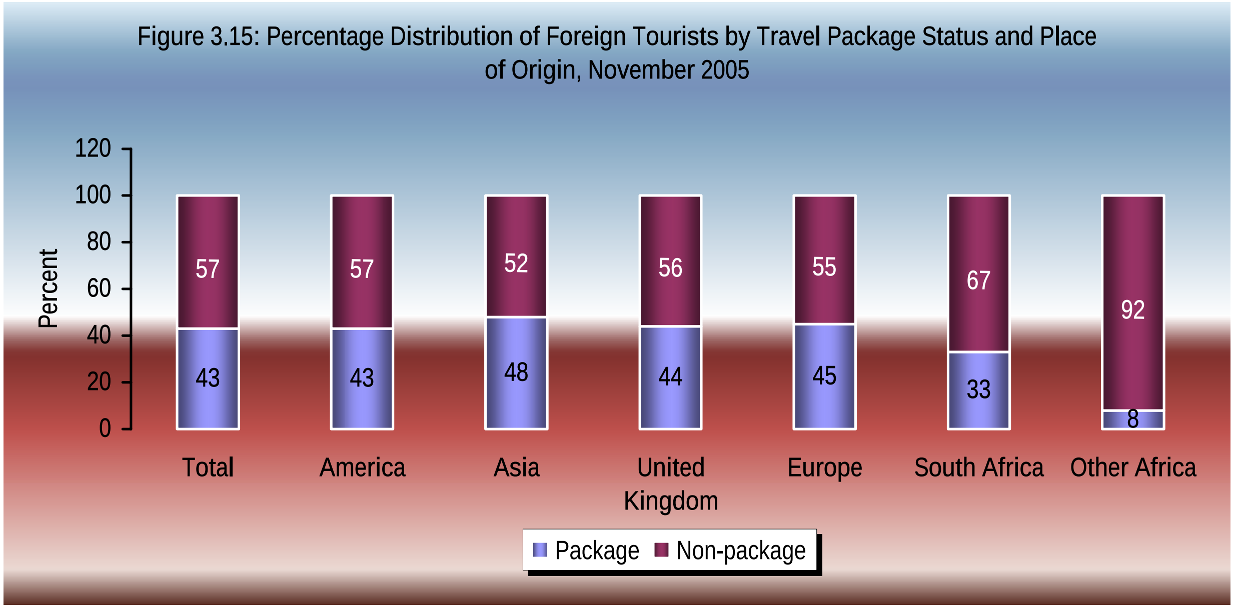
The Tourism Demand Survey has revealed that there are 2 types of foreign tourists that come to Zambia namely the Package tourists and the Non – Package tourists. The former comprises travelers whose whole trip has been pre-arranged at a cost by a Tour Operator whilst the later refers to tourists that make their own travel arrangement from their country of origin all the way to the country of destination.

Table 3.15 and figure 3.15 show the distribution of tourists by travel package status. Out of the total number of tourists that were interviewed, about 43 percent were traveling on tour packages. Packaged travels were most common amongst tourists of Asian and European origins. Tourists from South Africa and other neigbouring countries to Zambia are less likely to travel on packages compared to those coming from overseas.

It is worth noting that travel packages among foreign tourists essentially covered travel costs, accommodation, food and pack fees. Some quarters have raised concerns as to whether the country gains adequate foreign exchange later on income, from packaged tourists since the income remains in the tourists' country of origin. The question is, does the country suffer economic leakages as a result of packaged travelers? It would be important to identify the share of income that comes back to Zambia even if it is part of the operating costs of the Tourism Operators.

Table 3.15: Percentage Distribution of Foreign Tourists by Travel Package Status and Place of Origin to Zambia, November 2005

Place of Origin	Package Status			Sample of foreign Tourists
	Package Tourists	Non-Package Tourists	Total	
Total	43	57	100	1, 413
North America	43	57	100	252
Far East Asia	48	52	100	143
UK/Scotland/Ireland	44	56	100	408
Rest of Europe	45	55	100	449
South Africa	33	67	100	137
Other African Country	8	92	100	24

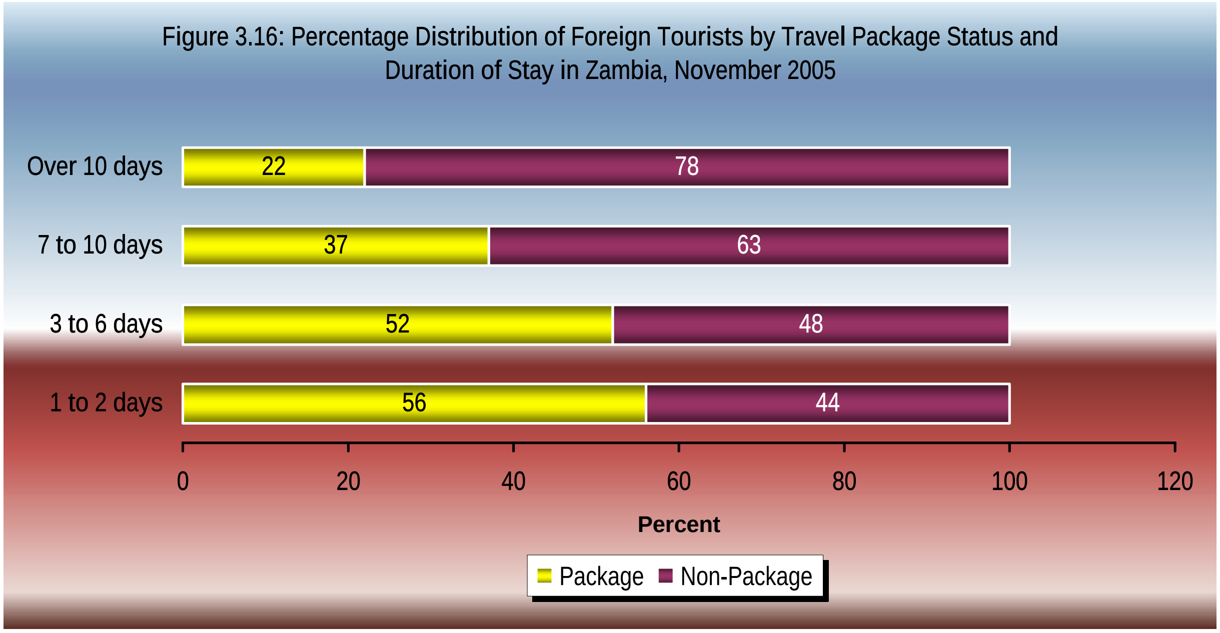


Further analysis of tourists by travel status indicates that non-packaged tourists are more likely to spend more days in Zambia than their counterpart. Of all the tourists that spent between 7 to 10 days and over 10 days, 63 and 78 percent were traveling on their own arrangements. Contrastingly, only 44 and 48 percent of the travelers that had spent 1 to 2 days and 3 to 6 days were Non-Packaged tourists, compared to 56 and 52 percent of the Packaged tourists (refer to table 3.16 and figure 3.16).

These results clearly demonstrate how restricted packaged tourists are in terms of their length of stay since they have to adhere to their travel itinerary, a situation that does not apply in the case of own-account (Non-Packaged) travelers.

Table 3.16: Percentage Distribution of Foreign Tourists by Travel Package Status and Duration of Stay in Zambia, November 2005

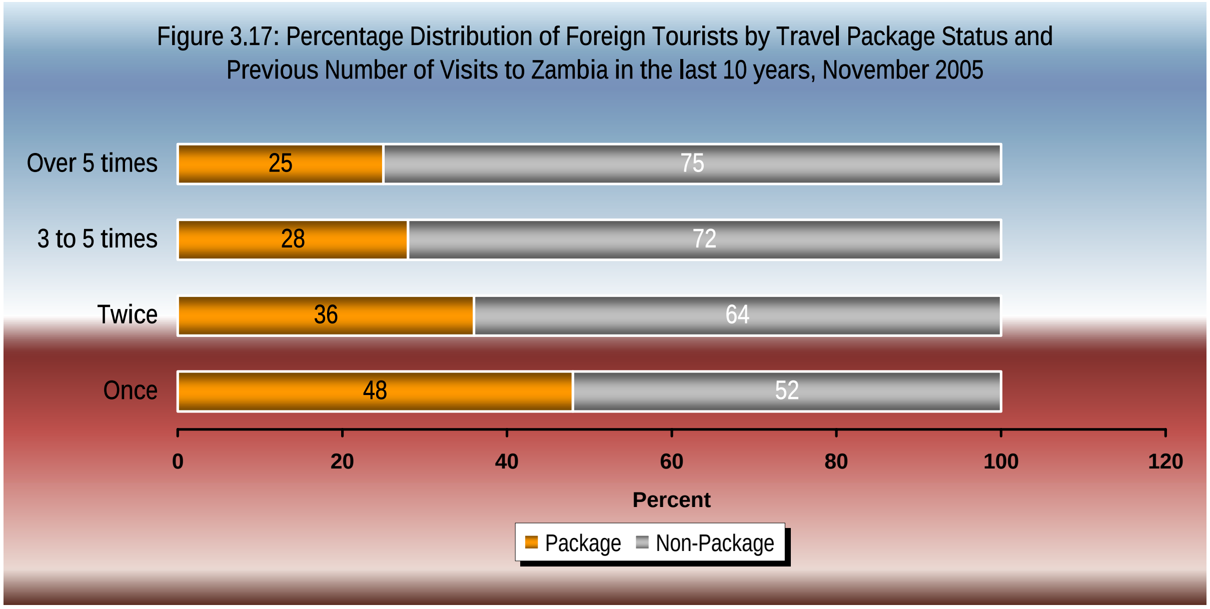
Duration of Stay	Package Status			Sample of foreign Tourists
	Package Tourists	Non-Package Tourists	Total	
Overall	43	57	100	1,413
1 to 2 Days	56	44	100	198
3 to 6 Days	52	48	100	610
7 to 10 Days	37	63	100	302
Over 10 Days	22	78	100	303



In addition, the majority of the repeat/return tourists opted to travel on their own account compared to, for instance, the first-time travelers. More than 70 percent of the tourists that had visited Zambia for at least 3 times in the last ten years were not traveling on tour packages. Nearly half of the tourists on their maiden visit to Zambia were traveling on tour packages. In short the proportion of packaged tourists decreases with every increase in the number of visits have been made in the last 10 years. It is therefore in order to state that tourists will tend to travel on their own account once they have made their first familiarization or orientation trip to Zambia (Refer to table 3.17 and figure 3.17).

Table 3.17: Percentage Distribution of Foreign Tourists by Travel package Status and Previous Number of Visits to Zambia in the last 10 years, November 2005

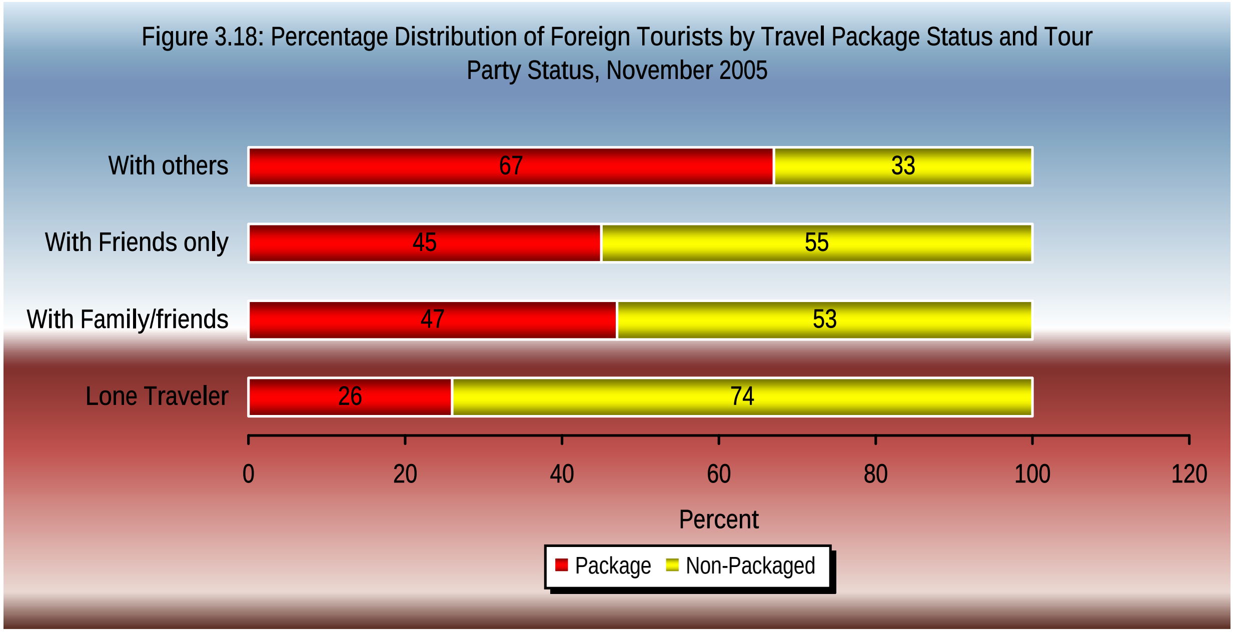
Previous number of visits to Zambia	Package Tourists	Non-Package Tourists	Total	Sample of foreign Tourists
Overall	43	57	100	1, 413
Once	48	52	100	1, 002
Twice	36	64	100	239
3 to 5 Times	28	72	100	83
Over 5 Times	25	75	100	89



Furthermore, results also reveal that companion travelers are more likely to travel on tour packages than solitary tourists. More than 40 percent of the tourists in the company of their families and friends had traveled on packaged tours compared to only 26 percent of the solo travelers. Stated differently, roughly one in every two companion travelers (those traveling with family and friends) were traveling on their own (Non-Packaged) compared to almost three in every four solo tourists (Refer to table 3.18 and figure 3.18).

Table 3.18: Percentage Distribution of Foreign Tourists by Travel package Status and Tour Party Status, November 2005

Tour party Status	Package Status			Sample of foreign Tourists
	Package Tourists	Non-Package Tourists	Total	
Overall	43	57	100	1, 409
Traveling Alone	26	74	100	382
Traveling with Family and Friends	47	53	100	635
Traveling with Friends	45	55	100	261
Traveling with Others	67	33	100	131



3.11 Multiple versus Single Country Destination International Tourists

A good number of international tourists have a tendency of visiting more than one country during their tourism trips. Quite a significant percentage of tourists that had come to Zambia were traveling as multiple-destination travelers. Most of tourists would first visit tourism natural sites in Namibia and/or Botswana via South Africa before coming to Zambia. A few tourists had also descended from Kenya and/or Tanzania into our amazing national parks mainly found in the valley areas of Zambia. Conversely, the majority of the tourists were single country destination travelers. These constitute the type of tourists who had Zambia as their single tourism destination.

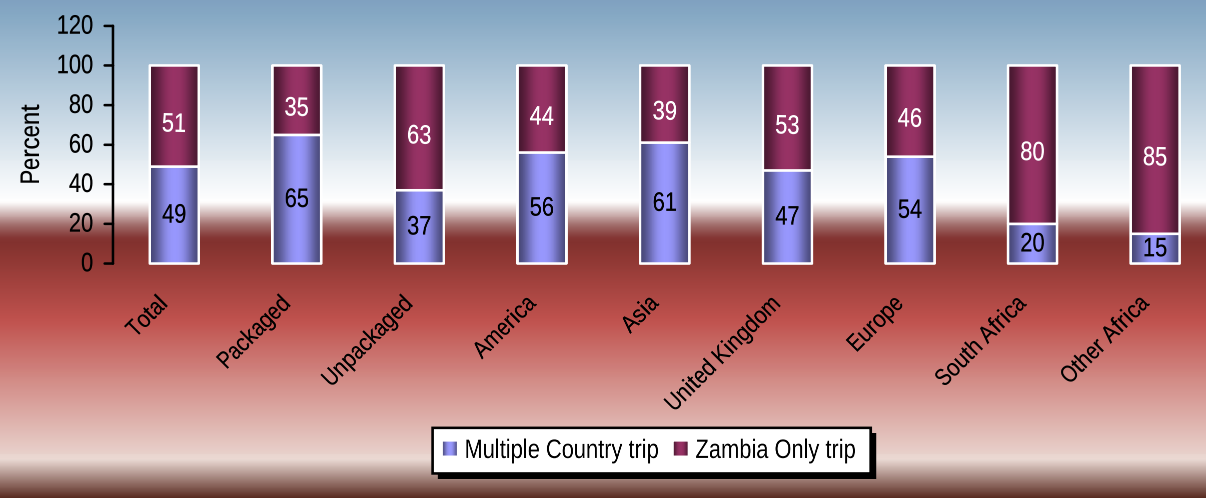
Table 3.19 and figure 3.19 show the distribution of tourists by destination status, package status and place of origin. Of all the international tourists that were interviewed during the month of November, 51 percent were only visiting Zambia while the remainder were multiple country destination travelers. Results further show that packaged tourists are more likely to have multiple country destination trips (65 percent) than unpackaged tourists (37 percent). The proportion of multiple destination tourists was highest amongst the tourists from the Far East countries, at 61 percent, North America, at 56 percent and rest of Europe (54 percent). On the other hand, the majority of foreign tourists from within Africa, particularly those from South Africa, and those from the United Kingdom had visited Zambia only.

These results clearly points to the need to develop nature-based tourism in the country and transform it into a first choice destination. Zambia has potential to provide tourists with an all-encompassing tourism menu that include game and waterfalls viewing, fishing and numerous adventurous activities too many to mention. All the country needs to do is to open up and develop the remaining nature-based sites to tourism. There is absolute need to extensively market nature-based tourism to the outside world so that the country can have a better share of tourists all year round. The larger shares of tourists from within Africa and United Kingdom who visit Zambia only may be attributed to their better knowledge of Zambia's tourism potential. The country would be in a position to raise more revenue if tourists made Zambia their sole and vital destination.

Table 3.19: Percentage Distribution of Tourists by whether their Trip is a Single Country Destination or not and by Package Tour Status and Country of Residence, November, 2005

Country of Residence	Multi-destination	Zambia Only	Total	Number of foreign Tourists
Total	49	51	100	1, 418
Package Tour Status				
Packaged Tourists	65	35	100	602
Unpackaged Tourists	37	63	100	816
Country of Residence				
North America	56	44	100	253
Far East Countries	61	39	100	142
Britain/Scotland/Ireland	47	53	100	410
Rest of Europe	54	46	100	449
South Africa	15	85	100	26
Other African Countries	20	80	100	138

Figure 3.19: Percentage Distribution of Tourists by whether their trip is a Single Country Destination or not, Package Tour Status and Country of Residence, November 2005



3.12 Duration of Stay in National Parks

Table 3.20 shows the average number of days spent by tourists in various sites that were visited during the month of November 2005. With the exception of Livingstone, tourists spent on average 4 days in each of the sites visited. Results further show that smaller groups of tourists are more likely to spend more days in parks/sites than bigger groups. Couples and solitary travelers spent roughly 5 days in South Luangwa, Lower Zambezi and Kafue national parks compared to about 3 days spent by groups of more than seven members.

Table 3.20: Average Number of Days spent on Site by Size of Entourage, November, 2005

Site	Size of Entourage			
	Overall	1 – 2	3 - 6	7 and over
Livingstone	3	3	3	3
South Luangwa	4	5	4	3
Lower Zambezi	4	4	4	3
Kafue	4	5	3	4

3.13 Common Types of Accommodation Available around National Parks

Table 3.21 shows the distribution of tourists by type of accommodation used and site. The most popular type of accommodation used in Livingstone was Hotel/lodge (51 percent), followed by Chalet (23 percent) and camp site (12 percent). About one in every twenty tourists that visited Livingstone town stayed with friends/family.

In the case of South Luangwa National Park, the majority of the tourists stayed in built and tented chalets (54 percent). Another 34 percent of the visitors preferred to stay in camp sites.

Table 3.21: Percentage Distribution of Tourists by Type of Accommodation available in the Sites, November 2005

Site	Type of Accommodation						Total
	Camp Site	Chalet (Tented/Built)	Rondervel	Hotel/Lodge	Friends/ Family	Other	
Livingstone	12	23	3	51	5	6	100
South Luangwa	34	54	3	3	1	5	100
Lower Zambezi	22	49	2	10	7	10	100
Kafue	18	71	4	2	2	3	100

3.14 Tourists Evaluation and Ranking of their overall Experience and Value for Money

During the Tourism Demand Survey, tourists were asked to comment and rate various aspects of their trip such as their overall experience with wildlife, quality of food and accommodation, friendliness of staff, etc. The ratings were done with respect to the parks/sites that the tourists had visited during their tour. The rating was based on a 5 pointer scale ranging from 1 to 5, with 1 standing for “Very bad rating” and 5 for “Very Good rating”. For the purposes of this report, much of the unfolding analysis is biased towards the “good” and “very good” ratings.

Figure 3.20 shows the tourists ranking of their overall experiences in the four natural sites in terms of whether they were very much satisfied with the trip or not. The majority of the tourists that had visited Mosi O Tunya and Victoria Falls, South Luangwa, Lower Zambezi and Kafue National Parks reported that their overall experience was better than their moderate expectations. In the case of Livingstone area, about 90 percent of the tourists considered their overall experience to be at least good. The remaining national parks had more than 90 percent of the tourists that were in no doubt happy with their overall experiences.

These results demonstrate that generally, tourists were very much satisfied with their visit to Zambia's tourism sites; more especially those that had visited South Luangwa and Lower Zambezi National Parks. There is also need to improve on tourists' satisfaction in Kafue national park and Livingstone town to that which has been observed in South Luangwa and Lower Zambezi national parks. Returning tourists themselves constitute the best advertising agents that the country can boast of as long as they have a good story to tell about Zambia and it's natural wildlife sanctuaries and waterfalls.

Figure 3.20: Tourists Ranking of their Overall Experience, November 2005

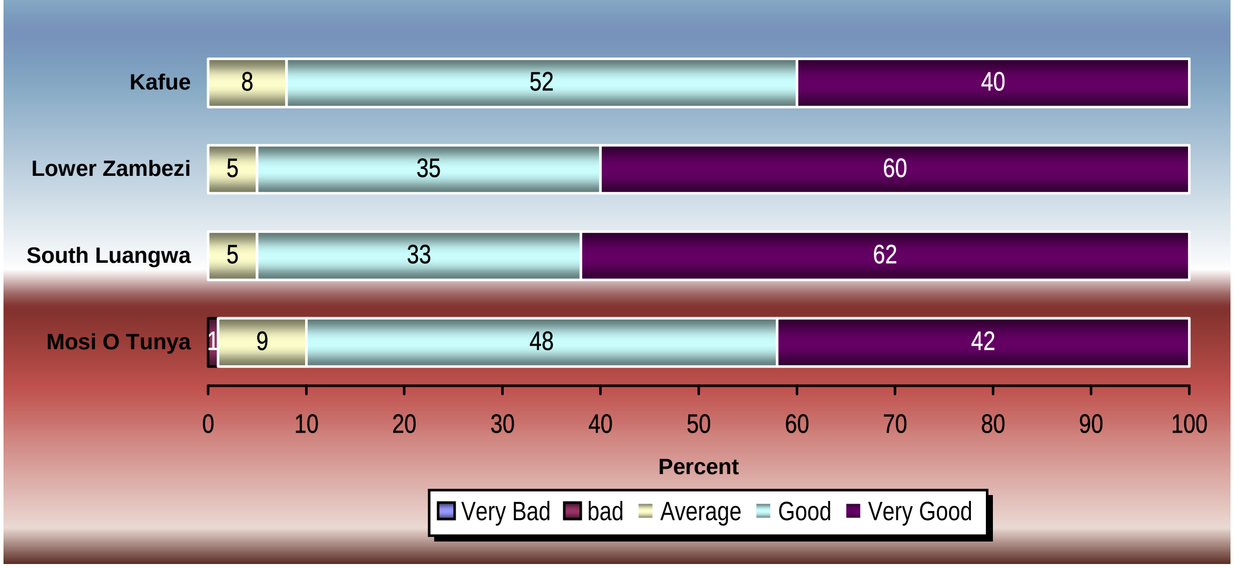
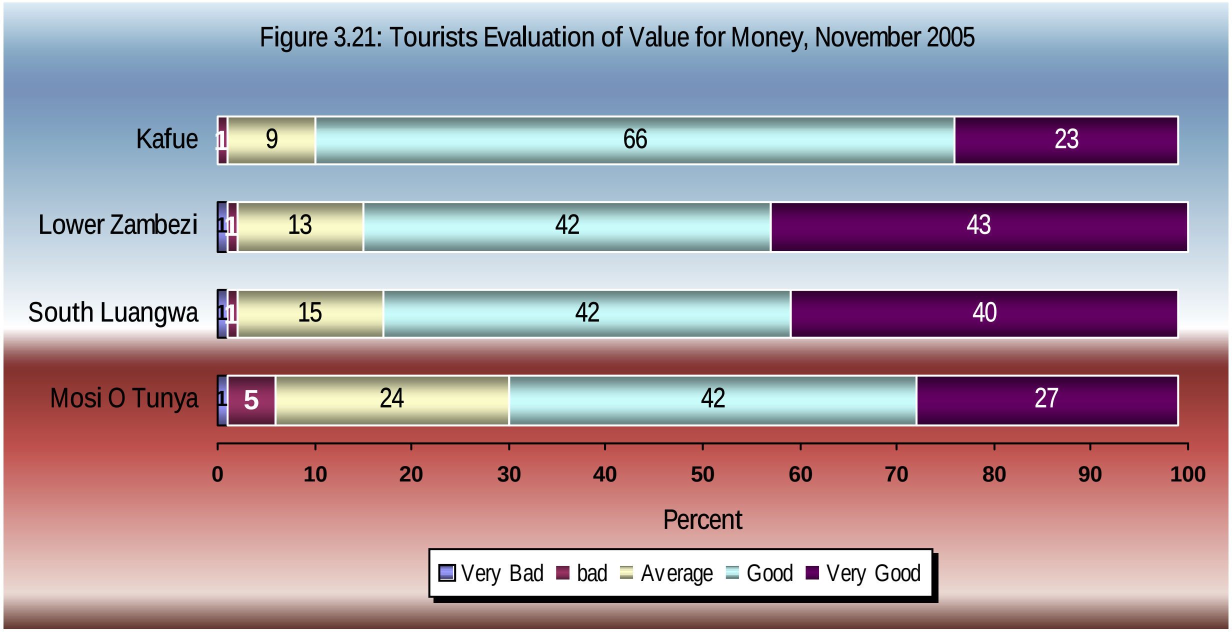


Figure 3.21 shows the tourists rankings in terms of value-for-money evaluations of their visit to the 4 tourism sites. Kafue National Park had the highest percentage of Tourists that indicated that their money was well spent (89 percent), followed by Lower Zambezi (85 percent) and South Luangwa national parks (82 percent). Contrastingly, only 69 percent of the tourists in Livingstone area thought they had good value-for-money (i.e. their money was worth spending). Notable from figure 3.21 is the high proportion of tourists in Livingstone who ranked the value-for-money as being bad, at 5 percent compared to only 1 percent in the remaining sites.

These results evidently point to the need to moderate the costs of some of the goods and services that have been over-priced in the eyes of foreign tourists, particularly in Livingstone town. The cost of food and accommodation has skyrocketed in Livingstone to the dislike of the majority of tourists. The pricing of goods and services needs to take into account the fact that the majority of tourists who in this case constitute the foreign tourists, belong to middle income groups and do not have the same capabilities of expenditure that are usually exhibited by wealthy tourists. Further, there is also need to improve on the quality of goods and services that are provided in the area.

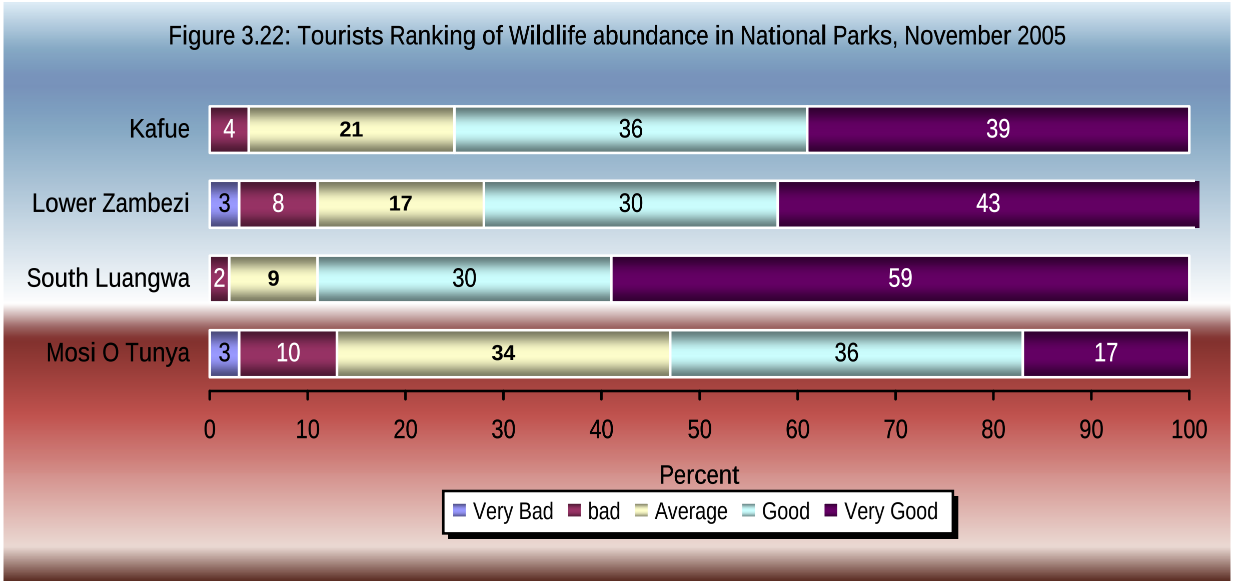


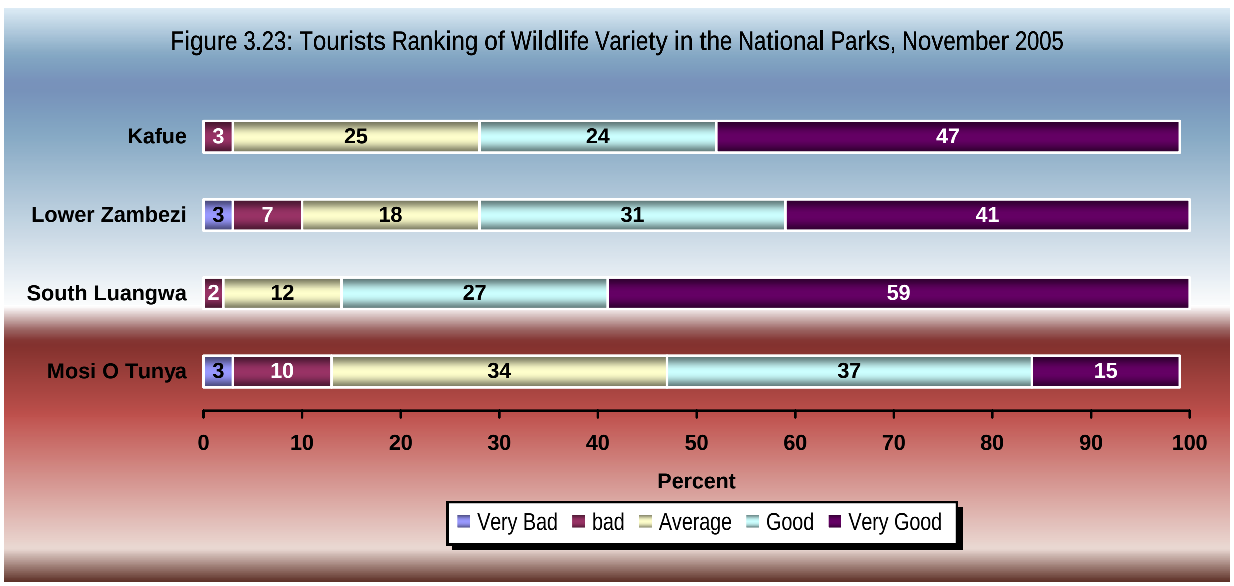
3.15 Tourists Perception of Wildlife abundance and Variety

Figures 3.22 and 3.23 show how tourists had ranked wildlife abundance and variety in the four main national parks. Generally, tourists were happy with wildlife abundance in all the four sites especially in South Luangwa National Park. Nearly 90 percent of the tourists that had been to South Luangwa National park reported that the park had comparatively an excellent profusion of wildlife. Next to south Luangwa are Lower Zambezi and Kafue national parks, which recorded slightly above 70 percent of tourists that were happy with wildlife abundance. Nearly half of the tourists that had visited the Livingstone tourism site remained apprehensive about the wildlife abundance in the area besides taking moderate stances on this issue.

The same pattern is replicated in the case of wildlife variety. A sizeable number of tourists had misgivings regarding the existing wildlife species. Specifically, tourists have complained of how had it is to view "Big Cats" (cheetah, lions and leopards) in most of the parks in Zambia. In some cases tourists openly indicated their disappointment for not seeing any of the big cats. In some parks such as the Lower Zambezi National Parks and Mosi O Tunya National Parks, it is not possible to view all the "Big Five" (elephant, buffalo, rhino, lion and leopard) just in one safari drive. Some animal species such as the rhino is almost extinct while others such as the lions and leopards are just too difficult to find.

These results clearly point to the need to increase the number of each wildlife species in our national parks especially in Mosi O Tunya National Park if Zambia is to become a major tourist destination. The Wildlife authority should ensure that tourists are at least able to view all the "Big Five" during their visit to the four main parks. Indeed the wildlife-restocking programme provides the country with an opportunity of bringing the numbers of various wildlife species to acceptable levels.

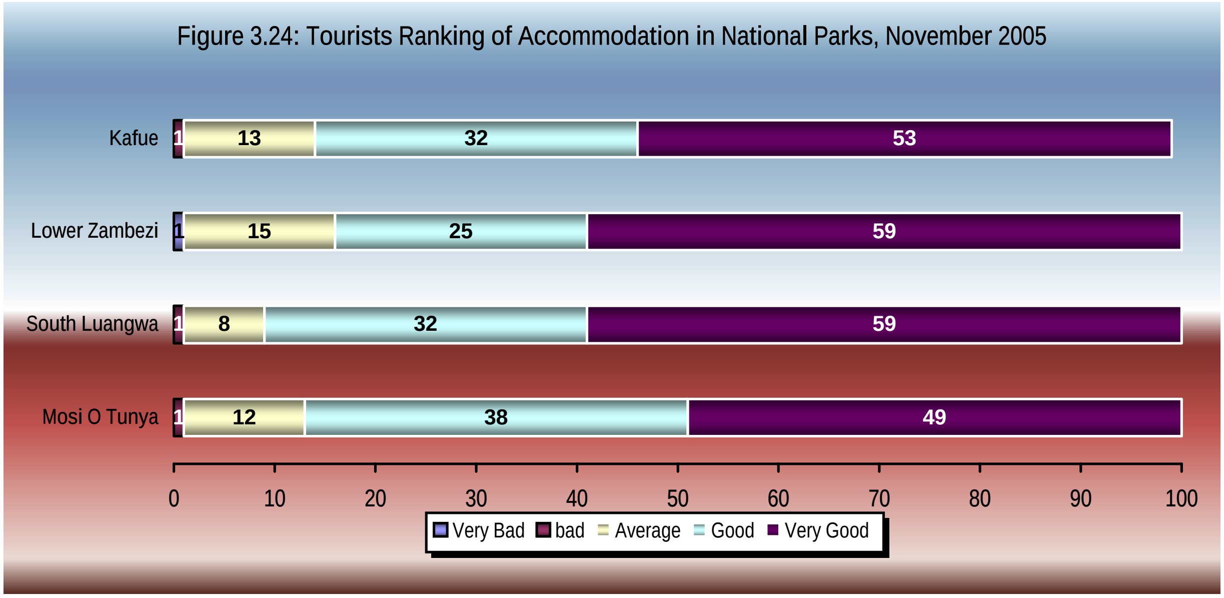


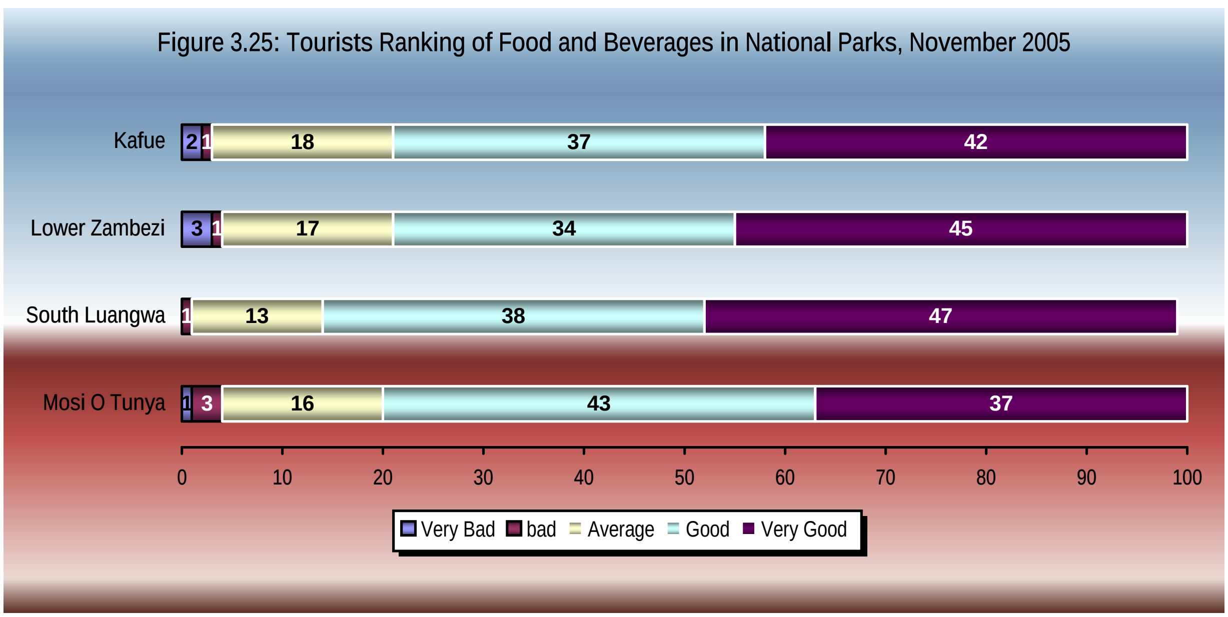


3.16 Tourists Evaluation of Accommodation, Food and Beverage

Figures 3.24 and 3.25 show tourists' ranking of accommodation and food in the four sites that were covered during the Tourism Demand Survey. Generally, the majority of the tourists had reported no major misgivings about the accommodation standards in the four sites. More than half of the tourists that had visited South Luangwa (59 percent), Lower Zambezi (59 percent) and Kafue National Parks (53 percent) were very happy with the quality of the available accommodation. Nearly half of the tourists in Livingstone area (49 percent) ranked accommodation to be of very good standard. Generally, tourists were comfortable with the quality of food and beverages especially in South Luangwa national park and Livingstone areas.

These findings have also identified the need to improve the quality of accommodation and food in the national parks especially in Lower Zambezi and Kafue National Parks so that it is of international standard.

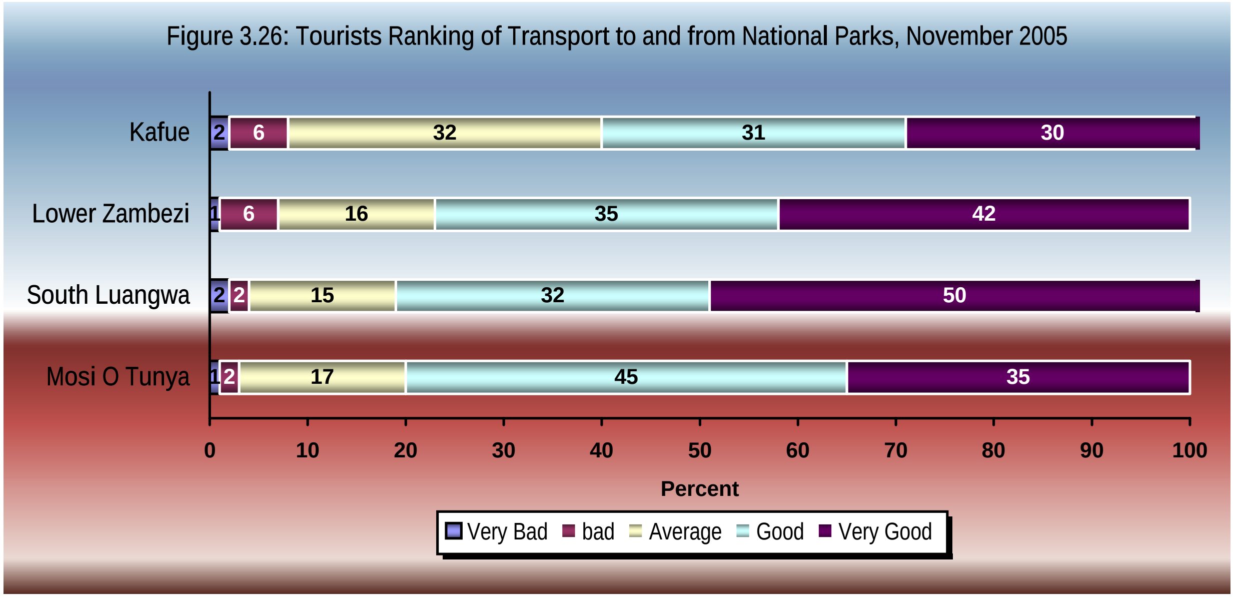




3.17 Tourists Perception of Transport to and from the Park

Figure 3.26 shows the tourists' ranking of transport to and from the national parks. Tourists were also asked to comment on the transport situation to and from the parks that they had visited on their trip. The majority of the tourists that had visited South Luangwa and Mosi O Tunya National Parks were by and large satisfied with the transport arrangement to and from the parks, 82 and 80 percent of the tourists, respectively. Conversely, only 77 and 61 percent of the tourists that had been to Lower Zambezi and Kafue National Parks were happy with the transport arrangement to and from the parks, respectively.

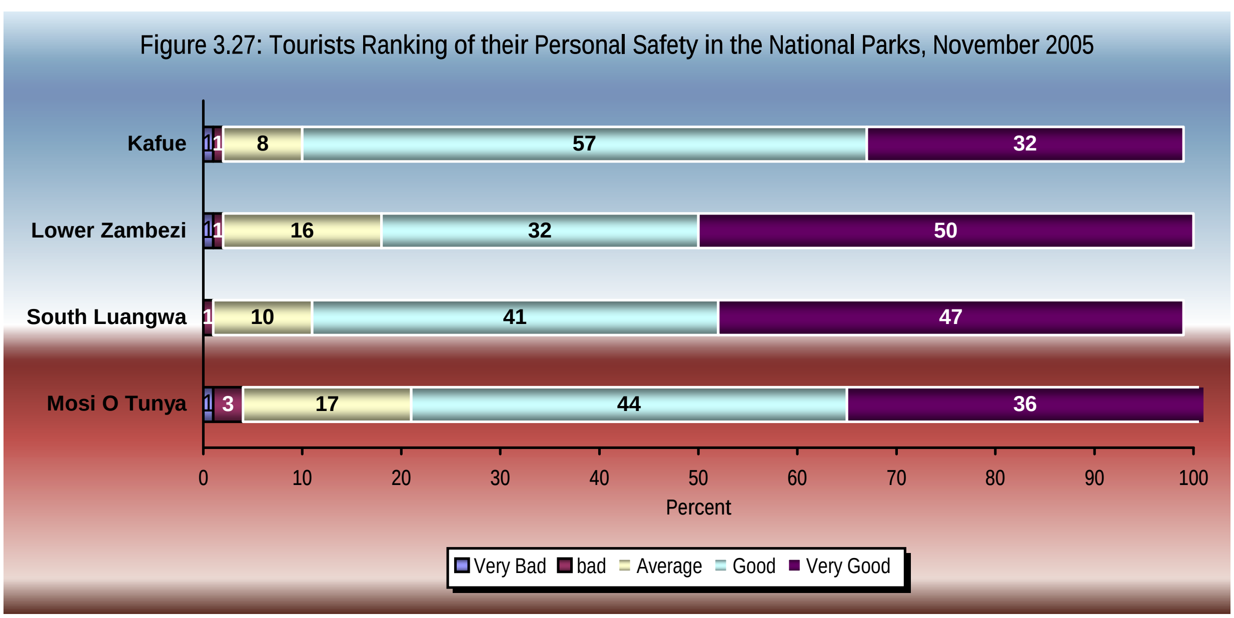
These results point to the need to improve on the transport infrastructure to and from the national parks, more especially the Lower Zambezi as well as the Kafue National Parks. In fact, these parks are usually closed early to tourism due to poor road infrastructure to the parks as well as within the parks.

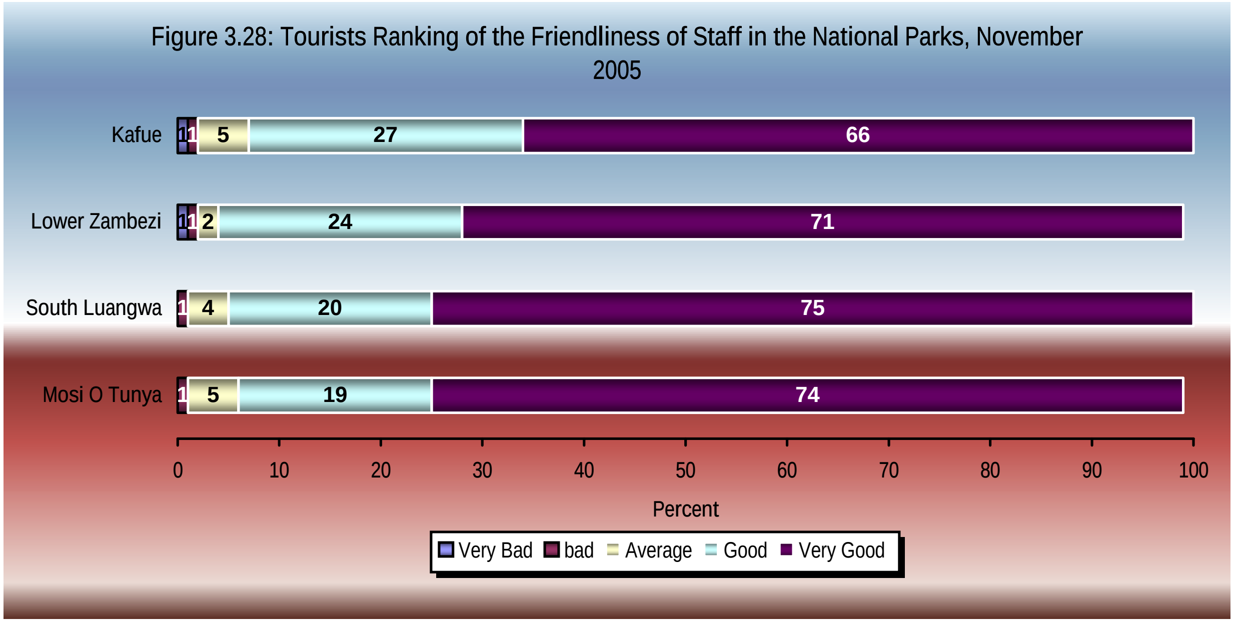


3.18 Tourists Perception of Personal Safety

One of the main factors that tourists consider when visiting a park is their personal safety and the friendliness of the staff in the parks. Zambia as a country enjoys a lot of peace and tranquility, which in itself is a good ingredient for tourism development. Figures 3.27 and 3.28 show the tourists' ranking of their personal safety and friendliness of staff in the fours parks that were visited. The majority of the tourists that were interviewed were rather happy with the arrangements that were provided for their personal safety especially in the Lower Zambezi and the South Luangwa National Parks. Further, more than 90 percent of the tourists had no misgivings about the friendliness of the staff in all the four national parks.

Despite this favourable response from tourists, there is still need to improve on personal safety measures of tourists in all our parks particularly in Livingstone area and Kafue national park. Improvements on personal safety in the game parks and around the waterfalls areas would help boost child tourism in Zambia.





3.19 Suggested Improvements in Tourism Sites

During the Tourism Demand Survey, tourists were asked to indicate various aspects that required to be improved in order to make their stay more exciting. Suggested areas of improvements ranged from provision of services to construction of infrastructure in and around the sites. Notably in Livingstone, the majority of tourists (23 percent) expressed the need for improvement on information about the falls, the park and other amenities within the town. Another 16 percent of the tourists demanded for improvements in road infrastructure. Further, 9 and 8 percent of the Livingstone tourists called for the removal of street vendors in the town centre and the introduction of more animal species in the Mosi O Tunya National Park. Other tourists demanded for improvement in water and sanitation services (6 percent).

Other areas of improvement that were suggested by the tourists in Livingstone include among other, the building of shopping complexes encompassing cinema halls, setting up of benches in the park, building of fences/barriers around the falls area, reduction in the amount of prices of goods and services, and diversifying activities available particularly in the park area. Moreover, some tourists also suggested the need to train more game reserves for protecting wildlife, improve the quality of transport and accommodation services. Other tourists expressed the need to construct more gates leading to the falls and park. Interestingly, some tourists also echoed the need to stop Zambia Electricity Supply Company (ZESCO) from diverting water from the falls. The dry falls was partly due to this water diversion.

In the case of South Luangwa National Park, the majority of the tourists (40 percent) indicated the need to improve road infrastructure including bridges in and around the park. Notably, about 23 percent of the tourists that visited the park called for more information about the park and its available amenities. Nearly 10 percent of the tourists expressed the need to introduce more animal species in the park. Some tourists (5 percent) also looked forward to improvements in the protection of wildlife by way of training more game reserves. Other tourists indicated the need to build more camping sites in the area and also reduce the price of services. Finally, some tourists demanded for improvement in land transport to the park. Specifically, 3 percent of the tourists called for the introduction of bigger buses to South Luangwa National Park. Other suggested areas of improvement ranged from provision of benches within the park to introduction of direct flights into the area.

Further, the majority of the Lower Zambezi National Park Visitors expressly called for improvements to the road infrastructure in and around the park (28 percent), followed by improvement in the availability of information about the site (14 percent). Nearly 10 percent of the tourists alike echoed the need to introduce more animal species and increase the number of game reservists. Other tourists called for the construction of additional camping sites and shops, and the reduction of prices of services in the park. Other suggested areas of improvement ranged from increasing the number of activities available to improving the quality of accommodation in the park.

It is worth noting that in the case of Kafue National Park, the majority of the tourists echoed the need to train more game reservists for protecting wildlife (22 percent), followed by the need to improve the road infrastructure in and around the park (20 percent). Another 15 percent of the visitors in the park demanded for improvements in the availability of information about the site. Eleven percent of the tourists expressed the need to construct additional camping sites in the area. Conversely, 10 percent of the visitors demanded for the introduction of more animal species in the park.

It is clear from the above suggestions that there is need to develop and improve access to most of the natural sites in Zambia. Specifically, improvement of road transport to these sites would greatly help improve the performance of nature-based tourism in Zambia. In addition, the need for information pertaining to where these sites are and what they have to offer will remain key to the overall development of the tourism sector for many years to come.

The Visit Zambia Campaign, which is being spearheaded by the Zambia National Tourism Board (ZNTB) constitute an effective way of providing tourism information to all travelers particularly holidaymakers from all over the globe. Indeed the introduction of Internet services has greatly helped the country market it’s tourism sites to the rest of the world. Tourism Operators should make use of the Internet technology to reach as many towns on the globe as possible. If possible, ZNTB should also post tourism adverts on the Internet in various languages including French, Japanese, Chinese, Portuguese, Spanish, Swahili, etc.

Table 3.22: Percentage Distribution of Tourists by Suggested Areas of improvement in Various National Parks, November 2005

Suggested Improvements	Sites			
	Livingstone	South Luangwa	Lower Zambezi	Kafue
Total	100	100	100	100
Improve Water and Sanitation situation	6	-	1	2
Provide more information on sites	23	13	14	15
Improve road infrastructure in sites	16	40	28	20
Introduce more animal Species	8	9	9	10
Train more Game Reserves to protect wildlife	2	5	9	22
Build more shops and cinema halls	4	6	4	1
Reduce prices of services	4	3	4	1
Remove street vendors and cleanup the city	9	-	-	-
Introduce benches in the parks	1	1	1	-
Introduce direct flights from Europe	1	1	-	-
Introduce children's facilities in parks	1	1	-	1
Improve on flight information in airports	1	1	-	-
Introduce more bigger buses	2	3	-	-
Stop ZESCO from diverting water from the falls	1	-	-	-
Build more gates/camps for accommodation	2	3	6	11
Open up more sites	-	-	2	1
Fence off the sites for protection	1	-	1	-
Build new airstrips in Parks	-	-	1	1
Improve quality of the Drivers on buses	1	-	-	-
Provide internet services in parks	1	-	1	-
Improve quality of rooms	2	3	2	1
Improve transport services in parks	2	1	1	-
Provide free food and drinks in parks	1	-	-	2
Relax VISA requirements	1	1	-	1
Reduce congestion in parks	1	-	-	2
Provide information on currency conversion	1	1	-	-
Increase activities in sites	3	1	3	-
Display prices of commodities in shops	1	-	-	1
Maintain the natural setting of the parks	1	1	1	-
Provide more training to tour guides	1	-	-	1
Introduce payments using master cards	-	1	1	-
Other	2	5	11	8

3.20 Tourists Plans for Repeat Visits to Zambia

Results from the survey also indicate bright tourism prospects in as far as visits to nature-based tourism sites are concerned. Overall, 86 percent of the tourists had declared their intention to visit Zambian nature-based tourism sites again in the near future. Nearly all the local tourists had declared to visit the natural sites in Zambia again. More than 90 percent of the tourists from African countries including South Africa had plans to visit Zambian sites again in the near future. A significant proportion of tourists (more than 80 percent) from America, Asia and Europe also planned to visit Zambian sites again (Refer to table 3.23 and figure 3.29).

This overwhelming response signifies the potential that nature-based tourism has for growth. The high rate of indication of repeat visits shows that tourists' expectations are by and large satisfied during their tour of the country's National parks and waterfalls.

Table 3.23: Percentage Distribution of Tourists by their Future Visitation Plans for Zambian Nature-based Tourism Sites and Place of Origin, November 2005

Place of Origin	Plans to visit Zambia Again			
	Yes	No	Total	
Overall	86	14	100	1,544
Zambian	99	1	100	114
America	83	17	100	251
Asia	82	18	100	145
United Kingdom	86	14	100	415
Rest of Europe	83	17	100	456
South Africa	93	7	100	137
Other African Countries	96	4	100	26

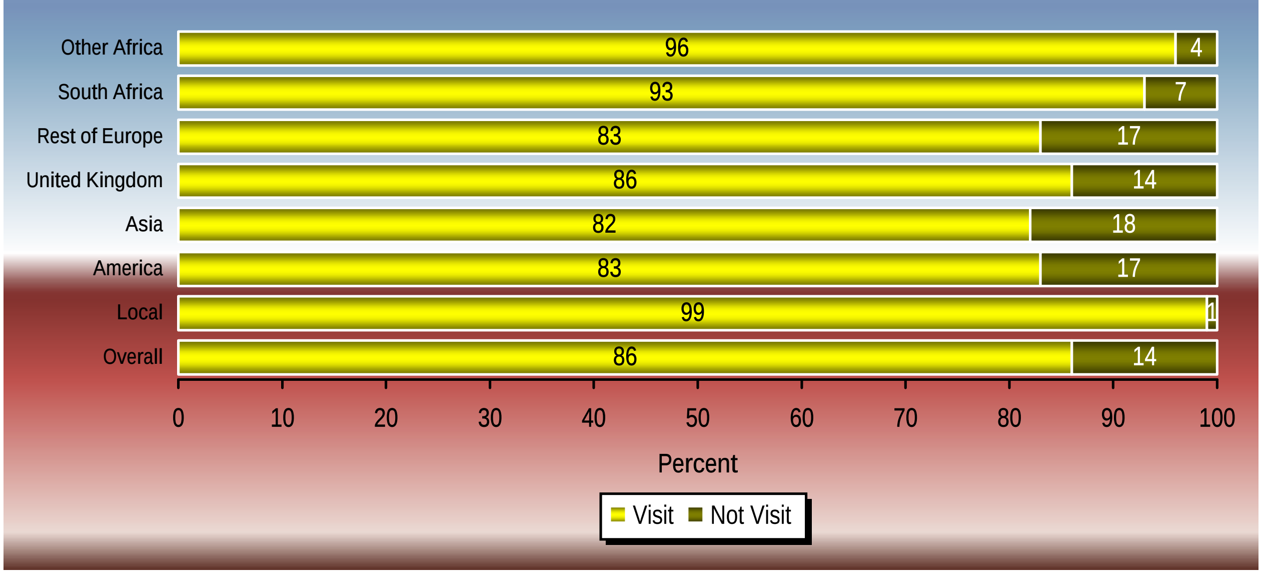


Figure 3.29: Percentage Distribution of Tourists by their Future Visitation Plans for Zambian Tourisml Sites and Place of Origin, November 2005

Further analysis of tourists plan to visit Zambia by package status and frequency of visits to Zambia shows a higher likelihood of repeat visits among own-account travelers (Non-packaged tourists) and Veteran tourists (Tourists that have made more than one visit to Zambia). The likelihood of a repeat visit increases with the frequency of visit to Zambia. Further, tourists that come to Zambia for business, adventure and family/friends visitation purposes are more likely to visit Zambian nature-based sites in the near future (Refer to table 3.24).

Table 3.24: Percentage Distribution of Tourists by their Future Visitation Plans for Zambian Tourism Sites, Travel Package Status and Number of Previous Visits Made to Zambia, November 2005

Place of Origin	Plans to visit Zambia Again			Sample of Tourists
	Yes	No	Total	
Overall	86	14	100	1,434
Travel Package Status				
Packaged Tourist	81	19	100	612
Non-Packaged Tourist	88	12	100	813
Number of Visits to Zambia				
Once	82	18	100	1012
Twice	89	10	100	247
3 to 5 times	95	5	100	84
Over 5 times	97	3	100	91
Purpose of Visit				
Business/Conference	91	9	100	140
View Mosi O Tunya falls	80	20	100	607
View Wildlife in Parks	87	13	100	316
Adventure/Cultural Trip	94	6	100	85
Visiting Family/Friends	92	8	100	132
Other reasons	82	18	100	131

3.21 Tourists Preferred Choice of Destination

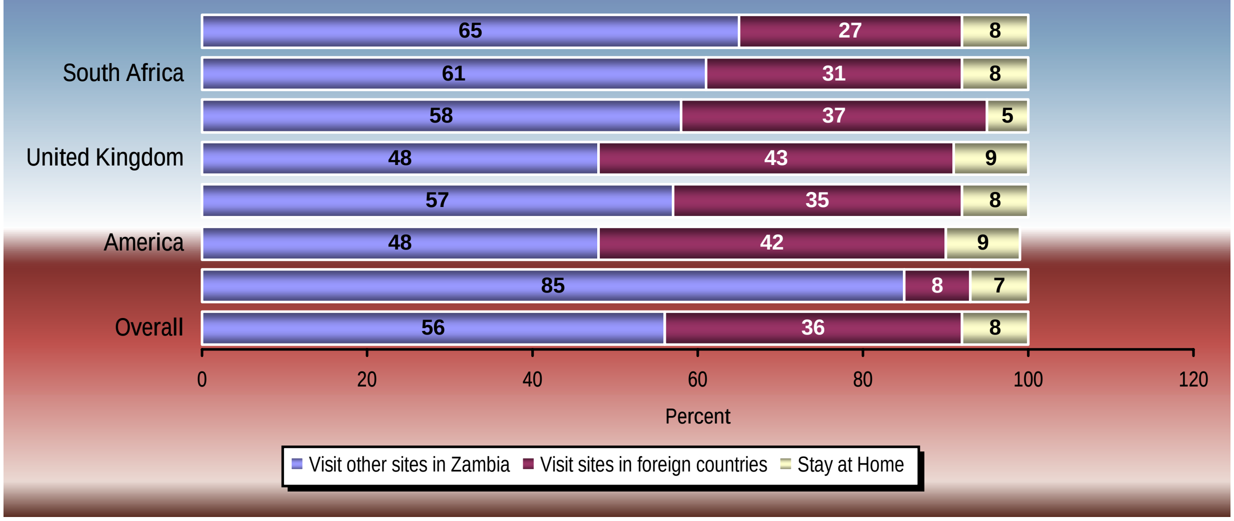
During the Tourism Demand Survey, tourists were also asked to indicate what they would do in the event of closure of their preferred choice of destination in Zambia. Slightly more than half of the tourists (56 percent) reported that they would still come to Zambia and visit other sites in the event of closure of their preferred destination. Conversely, 37 percent of the tourists indicated that they would instead visit similar sites in other countries while 8 percent stated that they would rather stay at their home.

The higher proportions of tourists of European and South African origins that would still visit other sites in Zambia in the event of unanticipated closure of their choices are justifiably okay since tourism sites have been well marketed and promoted in Europe and South Africa. These findings suggest the need to fully develop and market additional nature based tourism sites in a bid to provide potential tourists with a variety of tourism destinations within the country.

Table 3.25: Percentage Distribution of Tourists by their Visitation Status in the event of Closure of preferred Site and Place of Origin, November 2005

Place of Origin	Visitation Status				Sample of Tourists
	Visit other sites in Zambia	Visit other sites outside Zambia	Stay at Home	Total	
Overall	56	36	8	100	1, 540
Zambia	85	8	7	100	114
North America	48	42	9	100	250
Far East Asia	57	35	8	100	145
UK/Scotland/Ireland	48	43	9	100	413
Rest of Europe	58	37	5	100	456
South Africa	61	31	8	100	136
Other African Countries	65	27	8	100	26

Figure 3.30: Percentage Distribution of Tourists by their Visitation Status in the event of Closure of preferred Site and Place of Origin, November 2005



Further analysis of results by travel status shows that own-account (Non-Packaged) travelers are more likely to visit other sites in Zambia in the event of closure of their preferred choice compared to the packaged tourists. It is also worth noting from the results that business travelers and those undertaking cultural/adventure trips are more likely to still maintain Zambian sites as their destination in the event of closure of their initial preferred sites (refer to table 3.26).

Table 3.26: Percentage Distribution of Foreign Tourists by their Visitation Status in the event of Closure of preferred Site, Travel Package Status and Purpose of Visit, November 2005

Travel Package Status and Purpose of Visit	Site Preferences				Sample of Tourists
	Visit other sites in Zambia	Visit other sites in Zambia	Stay at Home	Total	
Overall	56	369	8	100	1421
Travel Package Status					
Packaged Tourist	47	47	6	100	608
Non-Packaged Tourist	58	33	9	100	813
Purpose of Visit					
Business/Conference	61	25	14	100	140
View Mosi O Tunya falls	42	50	7	100	603
View Wildlife in Parks	53	44	4	100	316
Adventure/Cultural Trip	66	28	6	100	85
Visiting Family/Friends	58	35	7	100	132
Other reasons	81	12	7	100	131

3.22 Tourists Memorable Experiences

During the Tourism Demand Survey, tourists were also asked to recount their most unforgettable part of their tour whilst in Zambia. Table 3.27 shows that the majority of the tourists were awestruck with the closeness of the wildlife including the big cats (lions and leopards). This memorable experience of getting very close to Game accounted for about one third (32 percent) of the tourists that were interviewed. The next important experience worth reliving was the awesome and amazing sight of the massive Victoria Falls. One in every 5 tourists that were interviewed stated that the falls was the most memorable experience of their excursion. Another 15 percent of the tourists considered the friendliness of the Zambian people to be worth reliving. Nearly one in every ten tourists that were interviewed had something to passionately recite about their experiences with Zambian rivers. To these tourists, river canoeing, boat cruising and fishing will remain as part of their awesome experience for sometime to come.

Other experiences that constituted the unforgettable part of the tourists' expedition include the Main Intercity Bus terminus, excellent vegetation and natural wildlife sanctuaries, excellent rolling landscapes and sceneries, adventure activities in Livingstone town including helicopter/micro flights across the waterfalls, excellent sunrise and sunset on the Zambezi and Kafue River and brilliant accommodation in Lodges.

Further, not all the tourists had good memorable experiences during their visit to Zambia. Some of the travelers considered high temperature prevailing in the parks as equally memorable. The amount of litter particularly in Livingstone town was surprisingly incredible to some tourists. Finally, the experience of very little water on the falls that thunders was quite an awesome encounter worth reliving to some tourists.

Table 3.27: Percentage Distribution of Tourists by the most memorable experience of their Tour, November, 2005

	Both	Male	Female
Total	100	100	100
Poorly managed Parks	1	1	0
Too much heat	2	2	2
Excellent River Activities (Canoeing, Boat Cruises and Fishing)	9	11	6
Excellent Unspoilt Natural Vegetation and Sites	2	2	2
Micro/Helicopter flights and Bungee Jumping	2	2	2
Too much litter in town	1	1	1
Amazing massive sight of the Victoria Falls	20	22	18
Rolling landscapes and impressive sceneries near rivers	2	2	2
Closeness to Plentiful Wildlife including big Cats	32	29	35
Very little water on Victoria Falls	1	0	2
Excellent Climate with Excellent sunrise and sunset	2	2	2
Very Friendly People	15	15	15
Professional Game guides including young people	1	0	1
Game/Walking Safaris	1	1	1
Good sight of Crocodiles and Hippos in Rivers and Lakes	1	1	1
Bad Road to South Luangwa	1	1	1
Excellent Accommodation in mass lodges	2	2	1
Elephant back Safaris	1	1	0
Main Bus Stop	4	3	5
Other	1	1	1

3.23 Tourists Willingness to Pay for Recreational Services

One of the methods used to determine the recreational value of the natural sites such as the four main national Parks in Zambia is by assessing the tourists' willingness to pay an extra fee for expected improvements in recreational services. During the Tourism Demand Survey, tourists were asked to indicate their willingness to pay for the entry fees applicable in Mosi O Tunya, South Luangwa, Lower Zambezi and Kafue National Parks given the following two scenarios:

- In the event of an increase in the entry fee, what would be the maximum fee that the tourists would be willing to pay as entry fee?

- In the event of improvements in the wildlife stock levels particularly the big cats, what would be the maximum fee that the tourists would be willing to pay over and above the previous maximum amount that the tourists had indicated?

Table 3.28, figure 3.31 and 3.32 show the average maximum entry fee that the tourists were willing to pay in the event of a price increase and improvements in the park/falls. In the event of an increment in the entry fee in Victoria Falls/Mosi O Tunya National Park, foreign tourists were willing to pay a maximum of US$28 as entry fee to the site, an amount that is nearly twice the current fee. In South Luangwa National Park, foreign tourists were prepared to pay a maximum fee of US$35, which is 75 percent over and above the current fee of US$20, as entry fee.

In the event of an increase in the entry fees in Lower Zambezi and Kafue national Parks, the international visitors were willing to pay as much as US$ 32 and US$ 22 as the maximum fees, the amounts which are definitely above the current fees of US$20 and US$15 charges, respectively.

In the event of possible improvements in parks especially in the area of wildlife density and diversity, the tourists were willing to pay as much as US$37, US$44, US$39 and US$28 as entry fees to the Mosi O Tunya, South Luangwa, Lower Zambezi and Kafue National Parks. These amounts are 32 percent, 26 percent, 22 percent and 27 percent over and above the previous maximum entry fee that the tourists would be willing to pay in the event of increments in park fees.

Ultimately, these results explicitly show that international Tourists are more willing to pay nearly twice the current entry fees to the above mentioned parks so long there are improved stocks of wildlife, more especially stocks of the “Big Cats”. Apparently, local tourists had exhibited the same pattern as foreign tourists in terms of the willingness to pay for recreational changes in all the four parks. Given these findings, it is perfectly in order to state that the four National parks under study may have a higher intrinsic value than is currently understood.

Table 3.28: Average Maximum Entry Fee that the Tourist is willing to pay in the event of Price increase and improvement in the Park/Falls, November 2005

Natural Tourism Sites	Average Maximum Amount the Tourist is willing to Pay				
	US Dollar			Zambian Kwacha	
	Current Entry Fee	Maximum Entry Fee in the event of Price increase	Maximum Entry Fee with Proposed Improvements	Maximum Entry Fee in the event of Price increase	Maximum Entry Fee with Proposed Improvements
Victoria Fall/Mosi O Tunya	15 (40,000)	28	37	56, 000	61, 000
South Luangwa National Park	20 (25,000)	35	44	49, 000	72, 000
Lower Zambezi National Park	20 (25,000)	32	39	41, 000	43, 000
Kafue National Park	15 (20,000)	22	28	26, 000	31, 000

Figure 3.31: Average Maximum Entry Fees the Local Tourists are Willing to pay in the event of Price increments and improvements in Park Recreational Services, November 2005

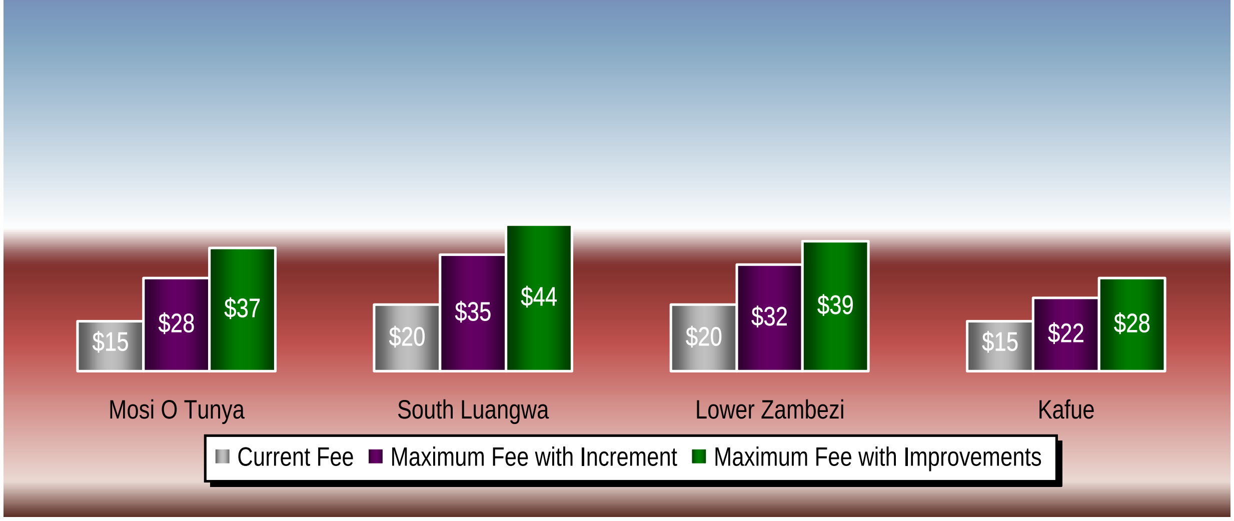
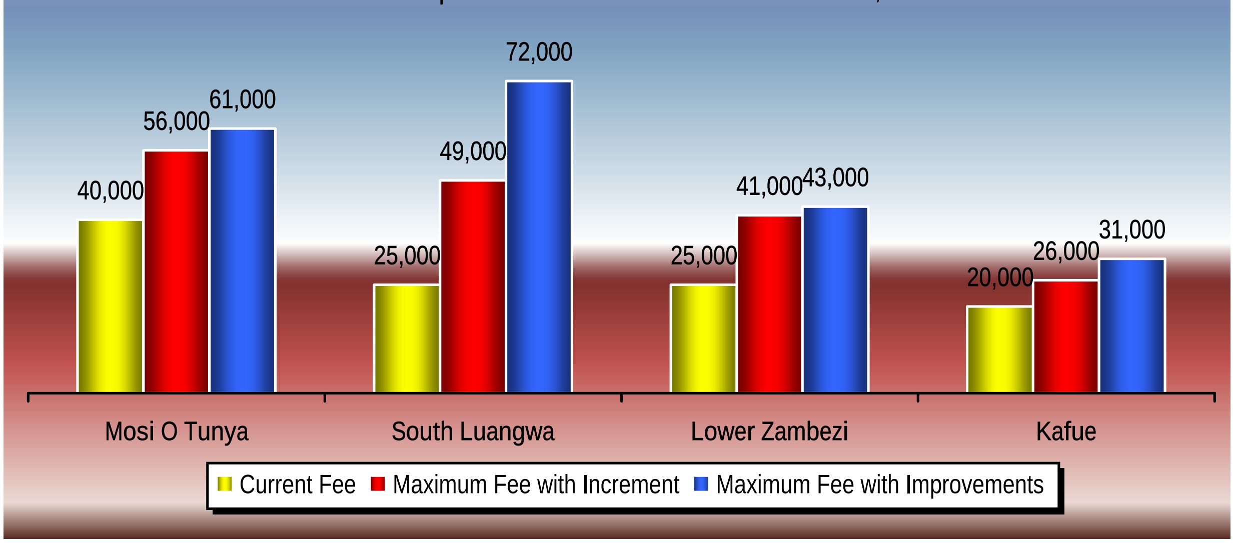


Figure 3.32: Average Maximum Entry Fees the Local Tourists are willing to pay in the event of Price increments and improvements in Park Recreational Services, November 2005



3.24 Tourism Conservation Tax

There are about 29 National Parks countrywide out of which only 4 have been fully opened up for commercial tourism and constitute the major tourists destination. North Luangwa national Park in Eastern province and Nsumbu and Kasanka National parks in Northern province have potential of becoming major Tourism sites. In addition to these sites, there are a number of waterfalls on many rivers in Zambia that provide quite a spectacular panorama views. However, these sites have not yet been fully developed for tourism purposes. The Government of the Republic of Zambia intends to open up these sites for tourism in it's bid to increase the contribution of the sector to the national economy. In addition, the government also has plans to intensify the protection of wildlife in the country by way of recruiting, training and deploying more game guards. However, the government does not have adequate resources to be able to implement these important activities for tourism development.

One way of raising additional resources for developing and protecting more tourism sites is through the introduction of a Tourism Conservation Tax (TCT). This tax can be paid through some universal billing system in the case of local tourists and through some airport tax in the case of the international tourists.

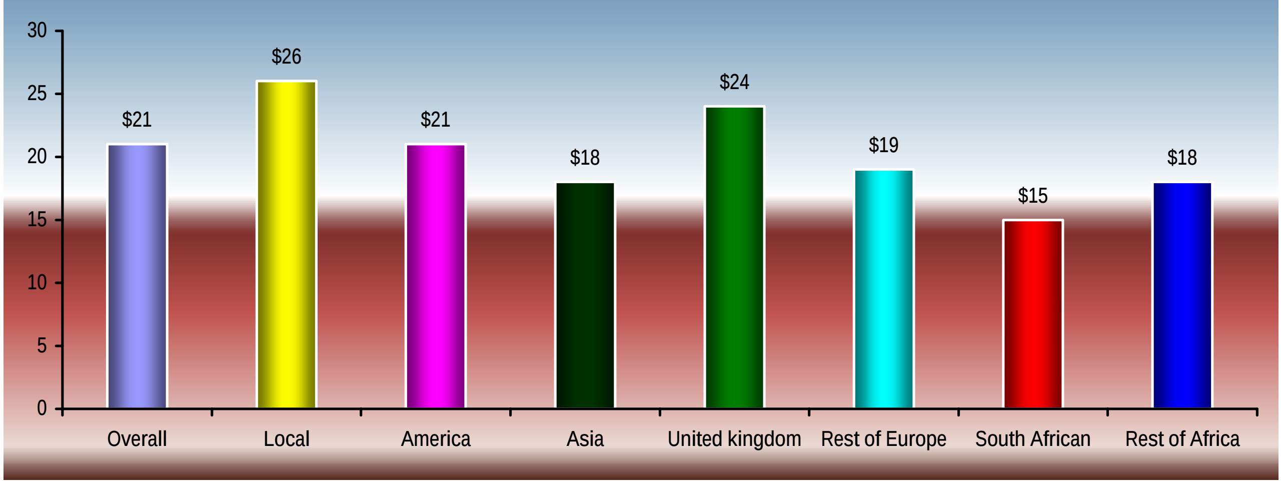
During the Tourism Demand Survey, tourists were asked to indicate the maximum Tourism Conservation Tax that they were willing to pay to enable the Government raise money for developing nature-based tourism sites. Overall, the average maximum conservation tax that the tourists were willing to pay was US$21. This amount varied from US$26 for local tourists to US$15 for South African tourists (Refer to table 3.29 and Figure 3.33).

Assuming a tourists turnout of about 1,000,000 and a TCT tax of US20.00, the government would be raising US$20, 000, 000.00 or an equivalent of about K85 billion Zambian Kwacha per annum. With the subsequent development of additional sites, annual tourists turnout would also increase to levels that are currently only associated with Kenya and South Africa. According to WTO report of 2004, Zambia holds a tourism market share of only 4.3 percent in the Sub-Saharan Africa. There is urgent need to increase this share to over 20 percent if the 10 percent contribution of the sector to the national economy is to be achieved. Furthermore, additional jobs would also be created as a result of developing more tourism sites in the country and eventually overall poverty would be reduced.

Table 3.29: Average Maximum Conservation tax the Tourist is willing to pay by Place of Origin, November 2005

Place of Origin	Maximum Conservation Tax In US Dollar	Sample Tourists
Overall	21	1147
Within Zambia	26	18
North America	21	218
Asian Region	18	124
Britain/Scotland/Ireland	24	312
Rest of Europe	19	347
South Africa	15	108
Other African Country	18	20

Figure 3.33: Average Maximum Conservation tax the Tourist is willing to pay by Place of Origin, November 2005



CHAPTER 4: Overview of Tourists Expenditure in Zambia

4.1 Introduction

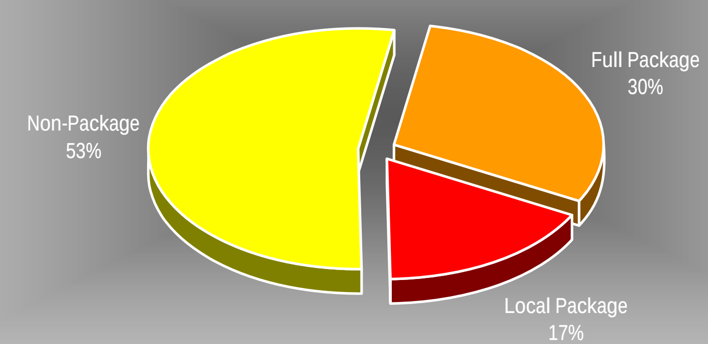
This chapter provides an overview of tourist expenditures in Zambia. It is based on data from the tourists exit interviews, which were conducted at the Lusaka and Livingstone international airports as well as at lodges/hotels in Livingstone, Kafue National Park, and South Luangwa National Park. A total of 1,578 tourists were interviewed, with foreign international tourists comprising approximately 93 percent of the sample.

This analysis is focused on foreign tourists' expenditures only. The analysis is deliberately restricted to foreign tourists visiting Zambia only, since it is practically difficult to apportion trip costs to other countries in the case of the multi-country destination tourists. Tourists visiting Zambia only account for a slight majority (51 percent) of foreign tourists in the sample. For the purposes of this report, all tourists' expenditures are in US dollars per capita terms. Further, the expenditures relate to those incurred in per capita terms during the tourists' whole trip.

The ensuing analysis characterizes tourists' expenditures incurred by foreign tourists according to whether the tourists traveled to Zambia on a full package, local package, or no package. Full package tourists purchase an all inclusive travel package, which generally includes international airfare, transfers, inland transportation to tourism attractions, accommodation, and some meals. Results show that full-package Tourists accounted for 30 percent of the foreign tourists that visited Zambia only.

Non-package tourists travel to Zambia on their own account and usually would either book a local package to visit Zambia's tourist attractions or arrange for their own site visits without purchasing pre-arranged packages from tour operators. Local packages vary considerably in terms of what they constitute. Some local packages are offered in conjunction with accommodations at some hotels, while others may include transportation to tourist attractions, as well as some meals. Tourists purchasing local packages accounted for 17 percent of the total sample. Conversely, non-packaged Tourists accounted for 53 percent of the sample (Refer to Figure 4.1).

Figure 4.1: Percent Distribution of Foreign Tourists that visited Zambia only by Tour Package Status, November 2005



4.2 Tourists per Capita Expenditure by Place of Origin

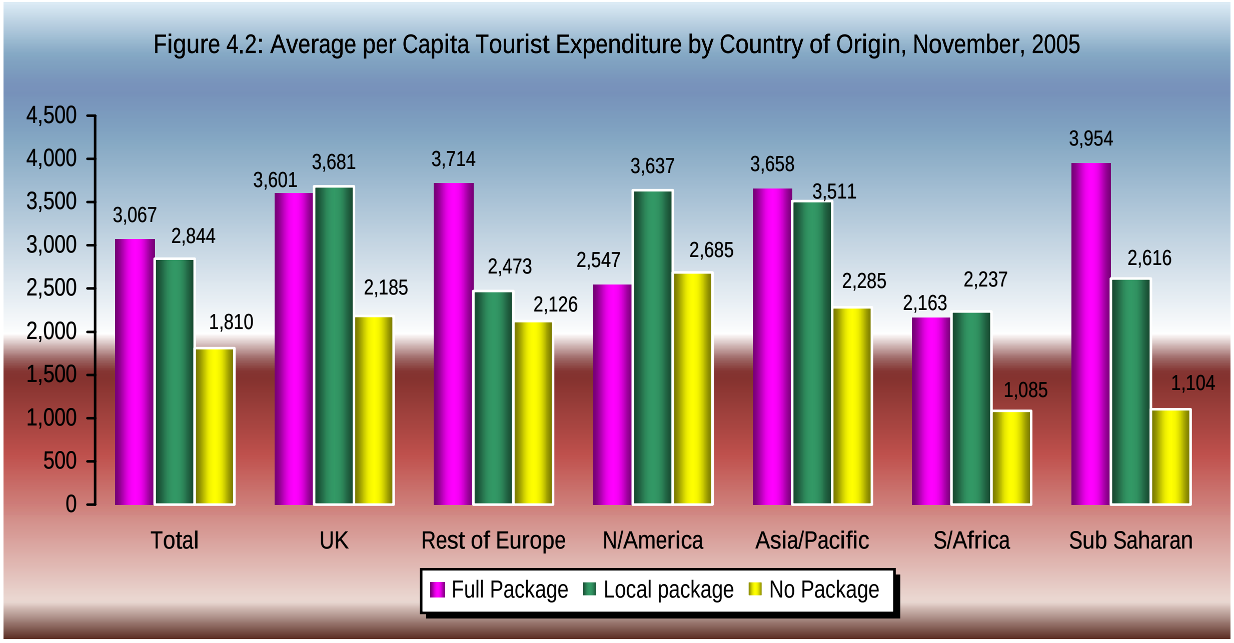
Table 4.1 and figure 4.2 show the average per capita tourist expenditure by country of origin. Results from the table show that in per capita terms fully packaged, local packaged and non-packaged tourists spent US$3,067, US$2,844, and US$1,810, respectively. This implies that on average tourists traveling on international packages spend more on their trips in per capita terms than those who travel on their own and only acquire local packages within Zambia. Better still, foreign tourists that organize their own travel arrangements spend far much less compared to tourists traveling on tour packages regardless of whether they are local or not. Surprisingly, American tourists on local packages spent more than their counterparts who were traveling on international packages. No major differences in per capita expenditures were observed between the full package and local package tourists from UK, Pacific/Asia and South Africa.

These results epitomize the fact that it is cheaper for foreign tourists to travel on their own than is the case when they are traveling on tour packages. However, the potential tourists for Zambia are those that at least attempt to acquire tour packages locally within Zambia. As a country, in order to enhance the contribution of tourism to the national economy, there is need to put up measures that compel all foreign tourists to start getting tour packages locally so as to minimize import leakages that are associated with International packages.

Table 4.1: Tourist Expenditures per Person by Trip Origin, November 2005

Zone of trip origin		Full Package	Local Package	No Package
UK	26%	3,601	3,681	2,185
		(3,153)	(3,650)	(1,459)
Europe	15%	3,714	2,473	2,126
		(2,551)	(1,675)	(1,513)
North America	10%	2,547	3,637	2,685
		(2,222)	(1,032)	(1,437)
Asia/Pacific	7%	3,658	3,511	2,285
		(1,594)	(1,429)	(1,374)
South Africa	31%	2,163	2,237	1,085
		(1,675)	(1,112)	(1,183)
Neighboring SSA	1%	3,954	2,616	1,104
		(3,242)	(1,604)	(1,112)
Average		3,067	2,844	1,810
		(2,569) 30%	(2,175) 17%	(1,469) 53%\

Notes: *Standard deviation of mean estimates in parenthesis.*



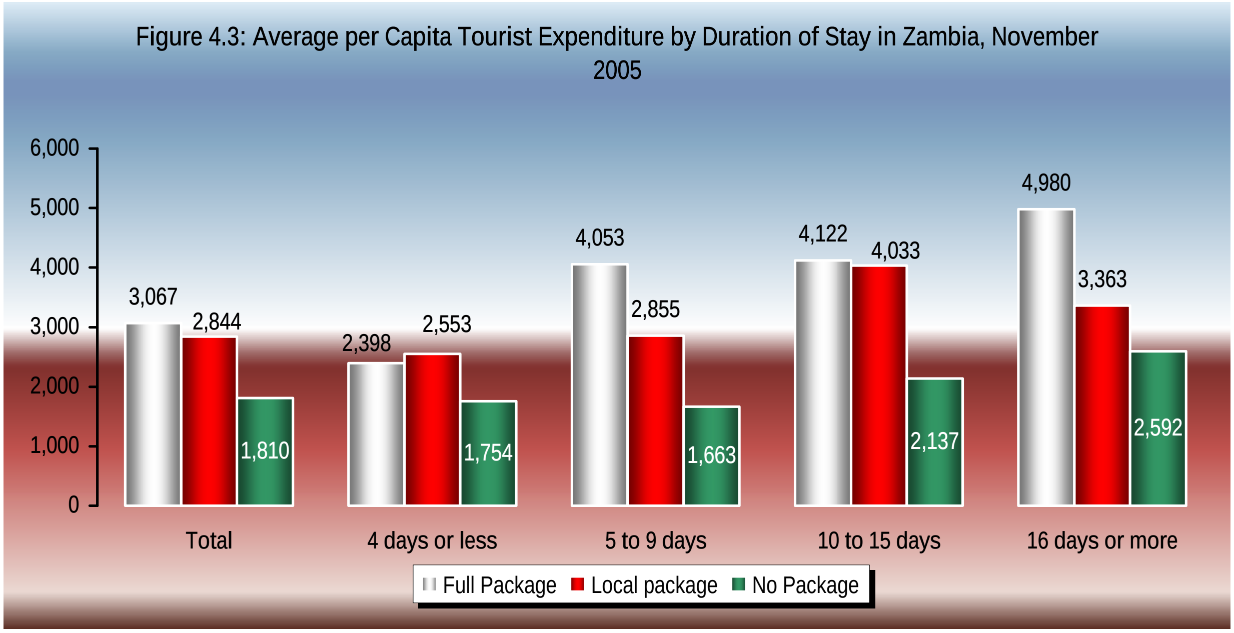
4.3 Tourists per Capita Expenditure by Duration of Stay in Zambia

Table 4.2 and figure 4.3 show average per capita tourist expenditure by length of their stay in Zambia. Results in the table clearly indicate that tourist's expenditure increases with the increase in the number of days spent in Zambia. The increase in per capita expenditure is more pronounced amongst the fully packaged foreign tourists than among the locally packaged and non-packaged tourists. Per capita expenditure for fully packaged tourists nearly doubled as the number of days increased from less than 5 to more than 15. Notable from the results in figure 4.3 is the indifference in per capita expenditure among the fully packaged tourists as the number of days increases from 5 to 15.

These results are suggestive of the need to promote and offer tourists longer packages in terms of duration of stay but at a reduced rate since the longer the duration of their stay the more money is spent during that period.

Table 4.2: Tourist Expenditures per Person by Length of Visit, November 2005

	Full Package	Local Package	No Package
4 days or less 60%	2,398	2,553	1,754
5 to 9 days 26%	4,053	2,855	1,663
10 to 15 days 10%	4,122	4,033	2,137
16 or more days 4%	4,980	3,363	2,592

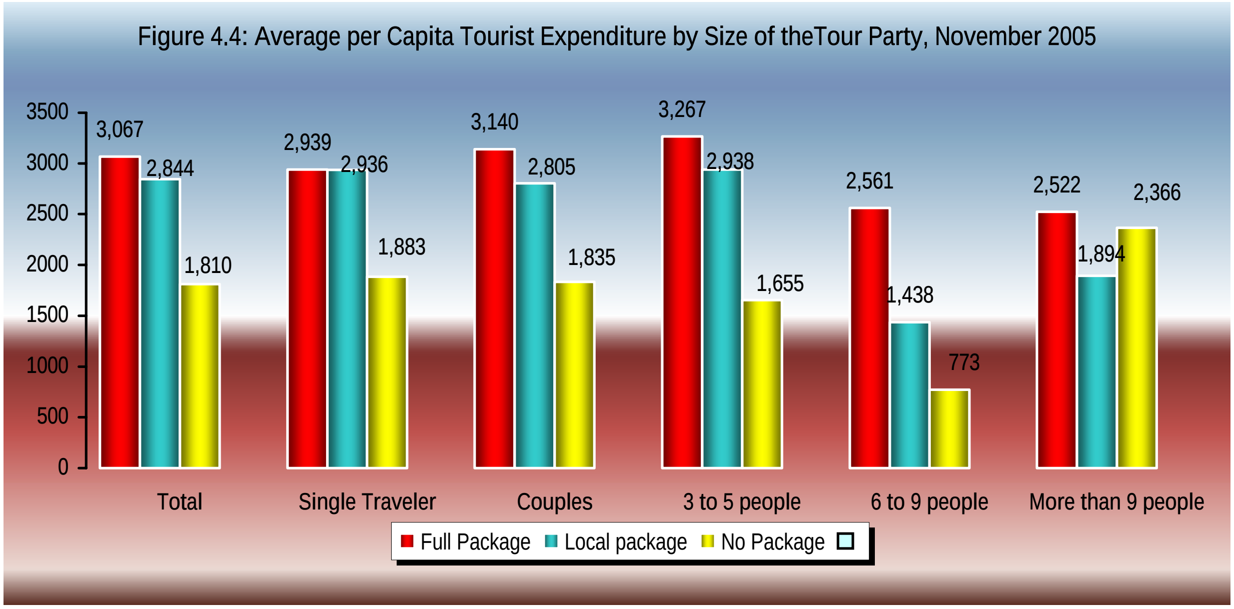


4.4 Tourists per Capita Expenditure by Group Size

Table 4.3 and figure 4.4 show average per capita tourist expenditure by the size of the tour party. Results in the table demonstrate how per capita tourists expenditure declines as the size of the group increases regardless of whether the tourist is traveling on a international/local package or not. Surprisingly, fully packaged couples have higher propensity to spend in per capita terms compared to say solo travelers. These results also show that larger groups of tourists are more likely to spend less if they obtained tour packages locally or better still if they made their own travel arrangements.

Table 4.3: Tourist Expenditures per Person by Group Size, November 2005

	Full Package	Local Package	No Package
Single traveler 34%	2,939	2,936	1,883
Couples 36%	3,140	2,805	1,835
3 to 5 people 22%	3,267	2,938	1,655
6 to 9 people 5%	2,561	1,438	773
10 or more people 3%	2,522	1,894	2,366

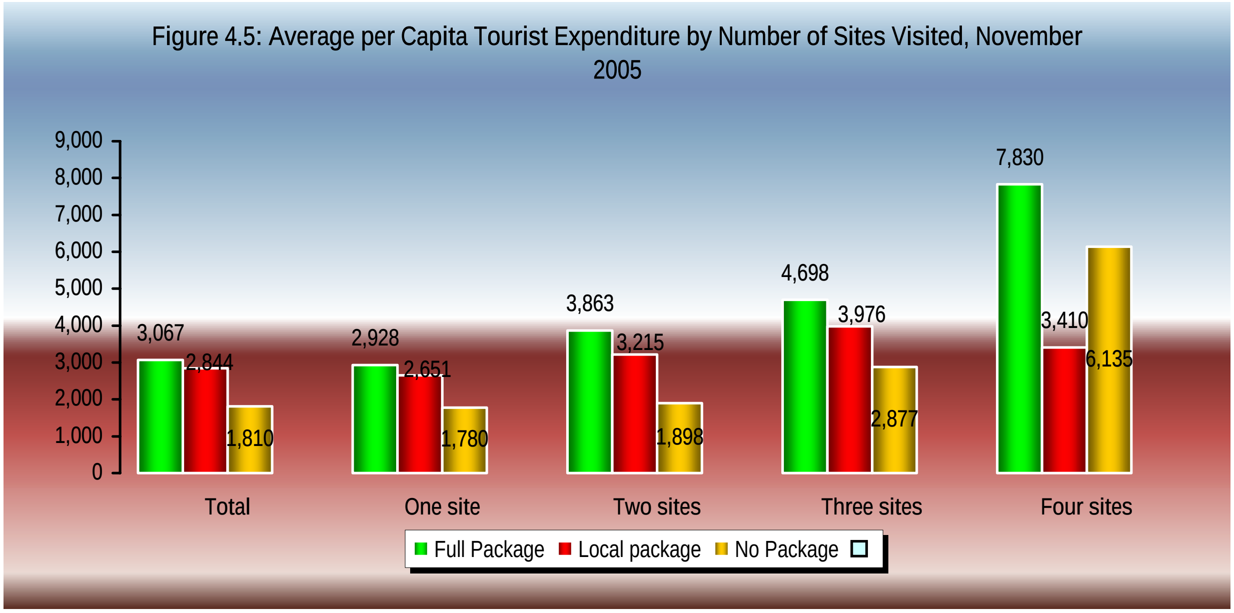


4.5 Tourists per Capita Expenditure by Number of Natural Sites Visited on a Trip

Table 4.4 and figure 4.5 show average per capita tourist expenditure by number of tourism sites that were visited by the tourist. The figure shows that tourist's expenditure in per capita terms increases with the number of sites that have been visited. The increase was more pronounced among the fully packaged than the non-packaged tourists. These results point to the need to provide tourists with more alternative sites in the country as a way of raising more of the much needed foreign exchange since tourists would be compelled to exclusively visit all the potential sites within the country.

Table 4.4: Tourist Expenditures per Person by Number of Sites Visited, November 2005

Number of sites visited		Full Package	Local Package	No Package
1	84%	2,928	2,651	1,780
2	12%	3,863	3,215	1,898
3	3%	4,698	3,976	2,877
4	<1%	7,830	3,410	6,135



4.6 Non-Packaged Tourists Per Capita Daily/Trip Expenditure by Type of Expenditure Item

Tables 4.5, 4.6 and figure 4.6 show the average per capita expenditure breakdown of non-packaged tourists for each trip as well as on a daily basis. Expenditures in this table only relate to those incurred within Zambia. It is worth noting that the average airfare for foreign tourists was US$1, 597.00 per trip per person. Results show that on average non-packaged tourists who visited Zambia only spent more money on accommodation, almost US$200, followed by inland transportation (US$137), park activities and food, at US$124 and US$114, respectively. In daily terms, Tourists still spent more on accommodation followed by park activities, food and transportation.

Table 4.5: Breakdown of Tourist Expenditures per Person per Trip* , November 2005

	Accommodation	Transportation	Food	Shopping	Activities
Mean	199	137	114	89	124
Std deviation	260	177	117	101	199
Range	10 - 2,103	4 - 1,600	3 – 667	3 - 750	5 - 2,500
N	392	287	386	236	337

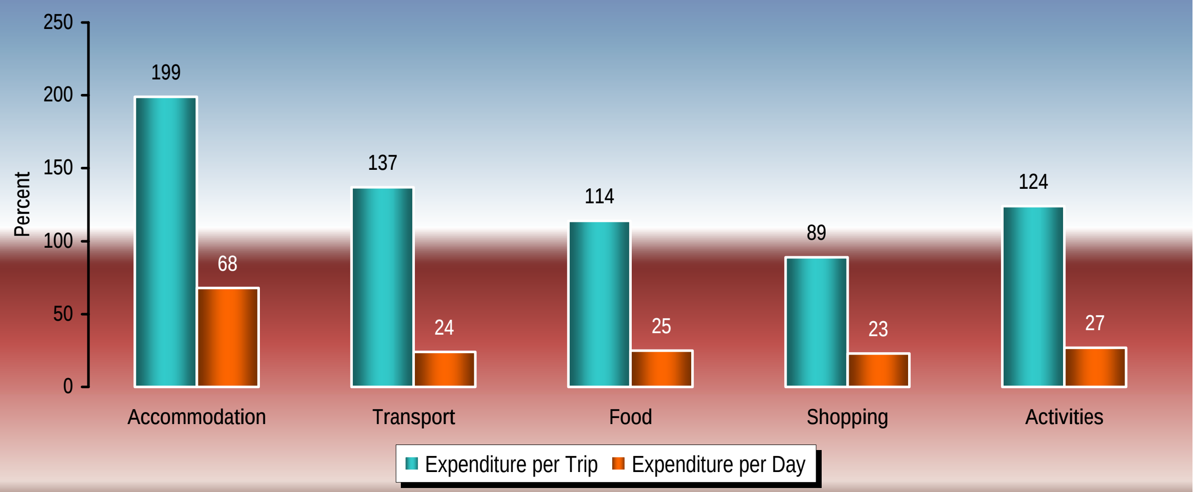
* Non package tourists only, conditional on positive expenditures
Mean international airfare expenditure is $1597

Table 4.6: Breakdown of Tourist Expenditures per Person per Day* November 2005

	Accommodation	**Transportation**	**Food**	**Shopping**	**Activities**
Mean	68	24	25	23	27
Std deviation	(97)	(39)	(34)	(53)	(37)
Range	10 - 700	3 - 360	3 – 260	3 - 600	3 - 375
N	226	194	321	183	278

* Non package tourists only, conditional on positive expenditures
Mean daily expenditures = $167. Mean number of days is 8.5

Figure 4.6: Breakdown of Tourist Expenditures per Person per Day, November 2005



CHAPTER 5: Conclusion and Recommendations

5.1 Study Conclusions

It is very clear from the study findings that the Tourism Demand Study was in fact long overdue. The role of tourism in poverty reduction and economic development in Zambia has definitely been overlooked for a long time. It is now a living fact that a fully developed tourism sector in Zambia can greatly contribute to the performance of the national economy and poverty reduction through employment creation. Despite this visible potential, very little is known about the true value of nature-based tourism. Specifically, the true contribution of the sector to Gross Domestic product is not known. Worse still, the country has scanty information on who the tourists are, where they come from and what their expectations are when visiting Zambias' nature-based tourism sites. This study has opened the lid on many aspects of tourism development that require relational information to help illuminate the demand side of nature-based tourism in Zambia.

It is obvious from the results that the whole habitable globe constitutes a viable tourism market for Zambias' nature-based tourism. The study has also revealed that Foreigners know very little about some of the existing tourism heritage sites in Zambia. The study has shown that education and employment play a direct role in tourism development. Persons with high education attainments and those in employment are more likely to visit nature-based tourism sites than the uneducated and unemployed ones.

This study has revealed that the tourists that come to Zambia are well traveled in the Sub-Saharan Africa. The study has provided information on which continents require intensified tourism marketing and promotional activities. This study has provided adequate information about the type of tourists that come to Zambia.

There is now information available on packaged versus non-packaged tourists, just like there is additional information on multi-country destination tourists versus single-country destination tourists. The study has revealed that packaged tourists travel on pre-paid and pre-arranged trips from their countries of origin while non-packaged tourists make their own travel arrangements. It is a finding of this study that packaged tourists on average spend fewer days in Zambia compared to the non-packaged tourists, despite spending more money during the trip.

This study has also established the fact that tourists that have been to Zambia before are more likely to make their own travel arrangements and spend less compared to those that are making maiden trips during their follow-up trips. It is the conclusion of this study that packaged tourists are associated with revenue leakages since not all the money that is paid to foreign tour operator find it's way back to Zambia. In fact, international packages themselves constitute a major deterrent to tourism growth in Zambia since the packages are somewhat more expensive and might be beyond the reach of middle-income foreigners who are potential tourists.

As a result of this study, there is now an understanding of what story the tourists have to tell about their visit to Zambia. As a result of these stories it has become possible to identify areas of tourism that need more policy redirection and interventions such as those to do with the improvement of infrastructure to tourism sites, improvement in the abundance and variety of wildlife and improvements on value-for-money issues. What this study has also brought to the fore is the fact that the country's natural sites have more intrinsic value than it has been imagined before. The study has also established the fact that the government in general and ZAWA in particular, can raise additional resources for tourism development through the introduction of Tourism Conservation Taxes (TCT) and upwards adjustment of park entry fees applicable across all tourists types.

Finally, this study has also shade light on some aspects of the study methodology that was adopted, which require to be attuned to prevailing standard practices. For instance, since the tourism season in Zambia stretches from April to November of any calendar year, there is need in future to employ a rolling sample of respondent tourists so that seasonal variations are put under control. In the same vain, future surveys will need to take into account the language barrier problem that is encountered when administering the questionnaires to respondents that speak languages other than English.

5.2 Study Recommendations

The following are some of the recommendations that have been conceived out of the Tourism Demand Study:

1. The Government and tourism operators should recognize and take into account the competitiveness of tourism in the sub-Saharan Africa when formulating and designing policies and programmes that are aimed at promoting tourism development

2. The Government should find a way of promoting and marketing local tour packages abroad in a bid to reduce import leakages which are associated with externally acquired packages. There is need to persuade tourists to start buying locally prepared tour packages from ZNTB recognized agents or tourism operators.

3. In order to increase tourist turnout, there is need to offer tourists that bring along families and friends as travel companion discounted local travel packages.

4. There is need to restock the national parks with some of the wildlife species that have become scarce for viewing. Specifically, restocking the parks with rhinos, leopards and lion would help enhance tourists satisfaction and make their trips much more memorable. This exercise will also help in preventing tourists from going to view wildlife that is scarce in Zambia in other countries such as Tanzania, Kenya and South Africa

5. There is also need to open up the national parks to 4x4 tourists and over Landers by improving on the road infrastructure. The Government and its cooperating partners should construct more roads leading to all the national heritage sites as a way of promoting commercial tourism

6. There is need to develop more tourism sites with the view of providing tourists with alternative destination choices within the country.

7. The Zambia Wildlife Association (ZAWA) should also improve the conditions of roads within the national parks

8. There is need to improve on the safety of tourists in all the national parks as well as Livingstone town. In the case of Livingstone the government should erect fences or barriers around the waterfalls area to prevent any imaginable fatal occurrences

9. The Government should as a matter of urgency look into the problem of water diversion by ZESCO from the Victoria Falls to avoid dry spells

10. The ZAWA should consider revising park entry fees upwards as a way of raising enough resources required for recruiting more game scouts

11. The Government should introduce a Tourism Conservation Tax as a way of raising part of the required resources for tourism development.

12. The Government through ZAWA should play an active role in managing the tourism sector

13. The Government should establish a Zambian airliner as a flag carrier to service international direct flights. This is another way of marketing the country's tourism potential

Appendices

Table A1: Percentage Distribution of Packaged Tourists by Type of Accommodation available in the Sites, 2005

Site	Type of Accommodation						Total
	Camp Site	Chalet (Tented/Built)	Rondervel	Hotel/Lodge	Friends/ Family	Other	
Livingstone	14	21	2	55	1	6	100
South Luangwa	46	45	4	1	1	6	100
Lower Zambezi	25	54	3	6	3	10	100
Kafue	10	81	7	-	-	2	100

Table A2: Percentage Distribution of Non-packaged Tourists by Type of Accommodation available in the Sites, 2005

Site	Type of Accommodation						Total
	Camp Site	Chalet (Tented/Built)	Rondervel	Hotel/Lodge	Friends/ Family	Other	
Livingstone	9	26	4	45	5	9	100
South Luangwa	27	60	2	4	1	5	100
Lower Zambezi	20	51	1	11	7	10	100
Kafue	23	69	2	2	2	2	100

Table A3: Percentage Distribution of Tourists by their Perception of Various Features in and around Mosi O Tunya Park, November 2005

Site Features/Services Available	Tourists rating of the Features/services available						Sample of Tourists
	Very bad	Bad	Average	Good	Very Good	Total	
Abundance of Wildlife	3	10	34	36	17	100	989
Diversity of Wildlife	3	10	34	37	15	100	982
Quality of Landscape	1	5	17	41	36	100	1036
Congestion levels	0	4	17	41	38	100	1035
Cleanliness of the surroundings	3	7	17	39	34	100	1036
Availability of Information	6	11	31	31	21	100	1030
Organized Excursions	1	4	18	38	39	100	965
Quality of Accommodation	0	1	12	38	49	100	1003
Quality of Food and Beverages	1	3	16	43	37	100	1005
Quality of Children's facilities	12	13	47	16	12	100	604
Diversity of activities in site	0	4	17	34	46	100	989
Friendliness of Staff	0	1	5	19	74	100	1027
Shopping Opportunities	5	11	37	30	16	100	993
Personal safety Provisions	1	3	17	44	36	100	1036
Value for Money Spent	1	5	24	42	27	100	1028
Quality of Transport	1	2	17	45	35	100	1015
Overall Experience	0	1	10	48	42	100	1037

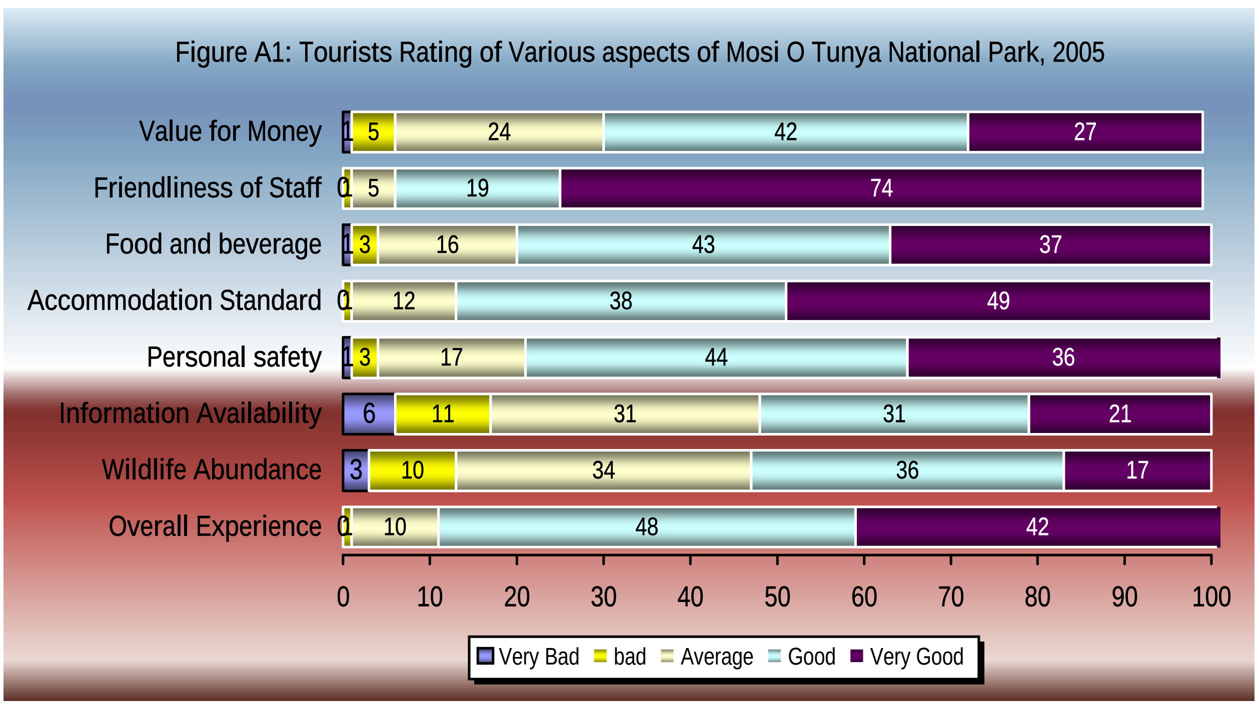


Table A4: Percentage Distribution of Tourists by their Perception of Various Features in and around South Luangwa National Park, November 2005

Site Features/Services Available	Tourists rating of the Features/services available						Sample of Tourists
	Very bad	Bad	Average	Good	Very Good	Total	
Abundance of Wildlife	0	2	9	30	59	100	451
Diversity of Wildlife	-	2	12	27	59	100	449
Quality of Landscape	-	2	16	32	50	100	447
Congestion levels	0	2	12	32	53	100	448
Cleanliness of the surroundings	0	1	7	27	64	100	448
Availability of Information	1	6	20	34	39	100	448
Organized Excursions	0	2	14	34	49	100	443
Quality of Accommodation	-	1	8	32	59	100	444
Quality of Food and Beverages	0	1	13	38	47	100	443
Quality of Children's facilities	20	18	33	14	15	100	230
Diversity of activities in site	2	6	27	35	31	100	436
Friendliness of Staff	0	1	4	20	75	100	445
Shopping Opportunities	17	20	31	16	15	100	345
Personal safety Provisions	0	1	10	41	47	100	447
Value for Money Spent	1	1	15	42	40	100	440
Quality of Transport	2	2	15	32	50	100	446
Overall Experience	-	0	5	33	62	100	449

Figure A2: Tourists Rating of various aspects of South Luangwa National Park, 2005

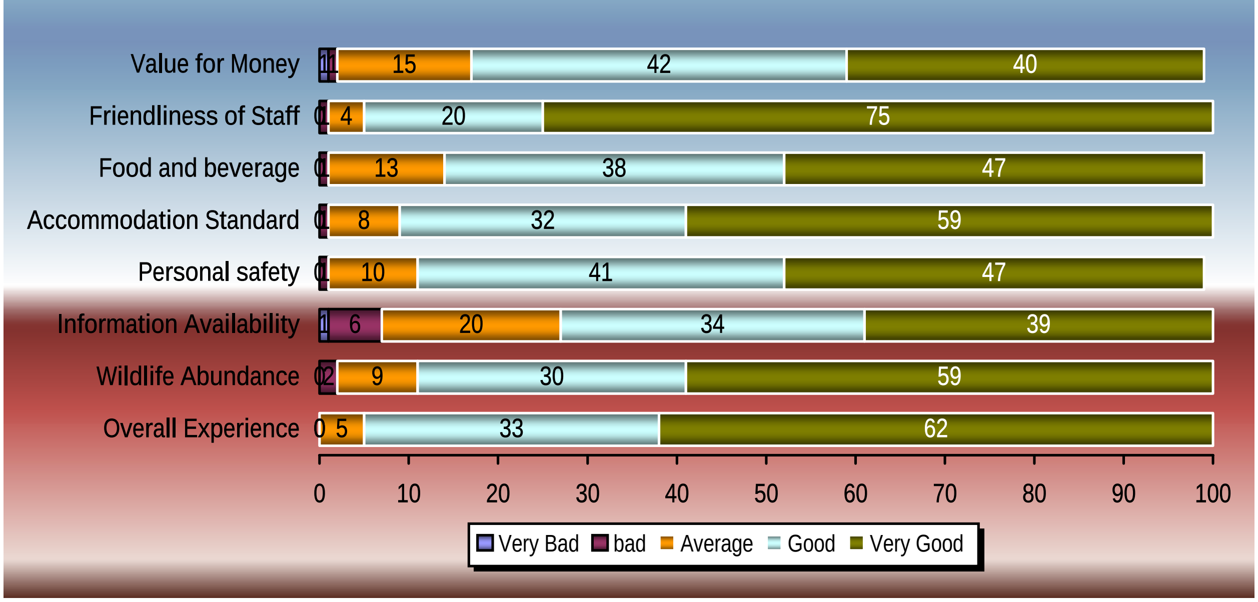


Table A5: Percentage Distribution of Tourists by their Perception of Various Features in and around Lower Zambezi National Park, November 2005

Site Features/Services Available	Tourists rating of the Features/services available						Sample of Tourists
	Very bad	Bad	Average	Good	Very Good	Total	
Abundance of Wildlife	3	8	17	30	43	100	149
Diversity of Wildlife	3	7	18	31	41	100	148
Quality of Landscape	-	1	10	28	61	100	146
Congestion levels	1	-	10	23	67	100	147
Cleanliness of the surroundings	3	1	7	24	64	100	147
Availability of Information	4	12	23	25	37	100	146
Organized Excursions	2	7	18	27	46	100	141
Quality of Accommodation	1	-	15	25	59	100	143
Quality of Food and Beverages	3	1	17	34	45	100	143
Quality of Children's facilities	24	14	30	17	14	100	76
Diversity of activities in site	2	9	22	33	34	100	141
Friendliness of Staff	1	1	2	24	71	100	143
Shopping Opportunities	35	25	15	12	14	100	113
Personal safety Provisions	1	1	16	32	50	100	146
Value for Money Spent	1	1	13	42	43	100	145
Quality of Transport	1	6	16	35	42	100	142
Overall Experience	-	-	35	35	60	100	145

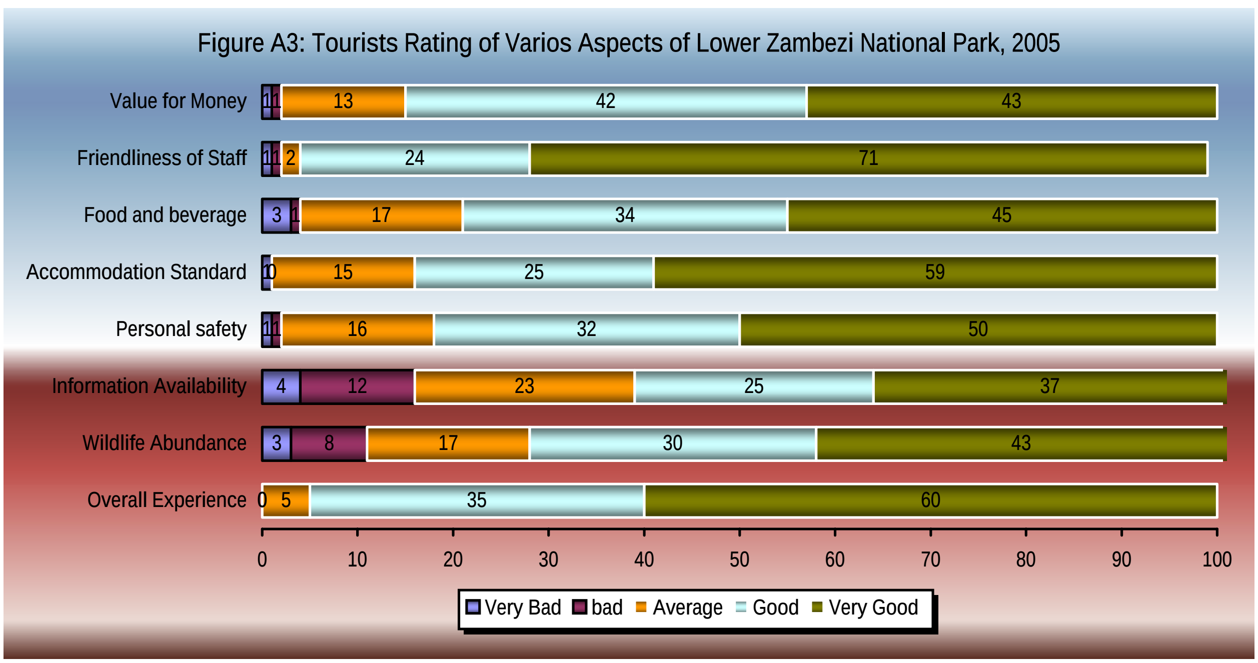


Table A6: Percentage Distribution of Tourists by their Perception of Various Features in and around Kafue National Park, November 2005

Site Features/Services Available	Tourists rating of the Features/services available						Sample of Tourists
	Very bad	Bad	Average	Good	Very Good	Total	
Abundance of Wildlife	-	4	21	36	39	100	205
Diversity of Wildlife	0	3	25	24	47	100	205
Quality of Landscape	-	1	5	24	69	100	204
Congestion levels	-	1	4	34	60	100	205
Cleanliness of the surroundings	-	0	7	33	60	100	205
Availability of Information	3	9	28	34	26	100	204
Organized Excursions	4	5	14	50	27	100	190
Quality of Accommodation	-	1	13	32	53	100	201
Quality of Food and Beverages	2	1	18	37	42	100	198
Quality of Children's facilities	13	21	31	17	17	100	126
Diversity of activities in site	2	4	24	34	35	100	198
Friendliness of Staff	1	1	5	27	66	100	203
Shopping Opportunities	42	17	19	8	15	100	130
Personal safety Provisions	1	1	8	57	32	100	202
Value for Money Spent	-	1	9	66	23	100	202
Quality of Transport	2	6	32	31	30	100	203
Overall Experience	-	-	8	52	40	100	205

Figure A4: Tourists Rating of Various Aspects of Kafue National Park, November 2005

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