



*Government of the Republic of Zambia  
Ministry of Tourism and Arts*

# **ZAMBIA TOURISM MASTER PLAN**

## **2018-2038**



*The project is funded by  
The European Union*

## FOREWORD

### FOREWORD BY: HIS EXCELLENCY MR. EDGAR CHAGWA LUNGU PRESIDENT OF THE REPUBLIC OF ZAMBIA AND CHAIRPERSON OF THE PRESIDENTIAL TOURISM COUNCIL



In line with the Seventh National Development Plan (7NDP), the Tourism sector is one of the drivers intended to create a diversified and resilient economy for sustained growth and socio-economic transformation. Therefore, the Zambia Tourism Master Plan (ZTMP) is meant to position the sector to contribute to the country's long term objectives as outlined in the Vision 2030 of becoming a "Prosperous Middle-Income Country by 2030."

Zambia lacked a comprehensive strategic framework to facilitate systematic exploitation of the country's vast tourism assets since 1978 when the last Tourism Master Plan was developed. The sector was characterised by ad-hoc plans resulting in lack of focus.


The Zambia Tourism Master Plan, should thus, be considered as a document that is meant to strengthen the systematic development of the country's vast tourism resources and should be viewed as a "Master Guide" for both tourism planning and development across the country. The Plan should however, be complemented by micro tourism planning at Provincial, District and other relevant lower levels because it does not zoom in to specific tourist attractions.

Furthermore, the Plan focuses on the development of leisure attractions and conference facilities where Zambia has comparative advantage for the country to rank among the most visited holiday destinations in Africa, as well as to become a regional conference hub. Development of tourist attractions will be strengthened by reviewing the country's marketing brand for Zambia to become a 'must see' tourist destination of choice.

The Plan recognises the multi-faceted and inter-linked nature of the tourism sector which calls for interventions to be tackled simultaneously through integrated (multi-sectoral) development approach to implementing identified programmes. Tourism cuts across almost all Government Ministries and its success is highly dependent upon the coordination and cooperation of other partners. To this effect, the Plan brings on board the Presidential Tourism Council (PTC) under my Chairpersonship. The Council shall be an umbrella body for all relevant ministries where key aspects of tourism strategy shall be identified in order to eliminate obstacles that inhibit the implementation and tourism growth.

This Plan has identified key tourism attractions and strategic issues across the country and spells out what ought to be done in order for the tourism sector to meaningfully contribute to the economic and social wellbeing of Zambians. The document is meant to position the tourism sector as one of the country's major contributors to job creation and foreign exchange earnings.

I am confident that effective implementation of this Master Plan will enable the Ministry of Tourism and Arts to facilitate the transformation of the tourism sector into a viable and sustainable industry capable of significantly contributing to the country's Gross Domestic Product, job creation and poverty reduction.

  
**Edgar Chagwa Lungu**  
**PRESIDENT**  
**REPUBLIC OF ZAMBIA**

## ACKNOWLEDGEMENTS



The development of the Zambia Tourism Master Plan (ZTMP) is anchored on the aspirations of the National Tourism Policy of 2015 which recognized the need to have a national strategic framework to guide the development of the tourism sector. The Master Plan document being national in scope, it was deemed necessary that stakeholders in the sector bring on board their expertise as well as financial resources to prepare a document intended to promote systematic development of the country's vast tourism resources.

Against this background, in 2017 the Ministry of Tourism and Arts embarked on the development of the Zambia Tourism Master Plan with the assistance of several stakeholders including the European Union who provided financial support amounting to Euros €300,000 for procurement of consultancy services. I am pleased to state that Cabinet has since approved the Zambia Tourism Master Plan.

I am therefore grateful to have an honour and privilege to convey my sincere gratitude to all individuals and organizations that participated during the development process of the ZTMP. Particularly, I am indebted to officials from the Ministry of Tourism and Arts including the Statutory Bodies under the Ministry for their effective coordination of the development process. Sincere thanks also go to the National Reference Group (NRG) for the review and timely feedback on the outputs of the consultants at every stage of the development process of the Master Plan. In addition, appreciations go to industry stakeholders from all over the country for their valuable inputs throughout the process.

Special thanks also go to the European Union (EU) for the financial support rendered to my Ministry which facilitated the procurement of consultancy services to spearhead the development of the Master Plan.

My appreciations would be incomplete if I did not recognize the critical role played by line Ministries and Provincial Administrations during the development process. Thank you for the valuable contributions without which this Master Plan document would not have been possible.

Last but not the least, I wish to express my gratitude to BKP Development Consultants for the valuable and professional guidance during the development process of the Master Plan.

A handwritten signature in black ink, appearing to be 'Ronald K Chitotela', written over a horizontal line.

Hon. Ronald K Chitotela, MP  
**MINISTER OF TOURISM AND ARTS**

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## Acronyms

AP	African Parks
ATM	Automatic Teller Machines
CBNRM	Community Based Natural Resource Management
CRBs	Community Resource Boards
CLZ	Conservation Lower Zambezi
CRN	Core Road Network
CSL	Conservation South Luangawa
DNPW	Department of National Parks and Wildlife
ECZ	Examinations Council of Zambia
FZS	Frankfurt Zoological Society
GDP	Gross Domestic Product
GRI	Game Rangers International
HBM	Hostels Board of Management
HEA	Higher Education Authority
HTTI	Hotel and Tourism Training Institute
IATA	International Air Transport Association
KAZA TFCA	Kavangu Zambezi Transfrontier Conservation Area
KT	Kasanka Trust
LIBES	Livingstone Institute of Business and Engineering Studies
LICAF	Livingstone International Cultural and Arts Festival
LIUTEBM	Livingstone International University of Tourism Excellence and Business Management
MICE	Meetings, Incentives, Conferencing and Exhibitions
MFEZ	Multi Facility Economic Zone
NGO	Non Government Organisation
MoTA	Ministry of Tourism and Arts
NAC	National Arts Council
NDAC	National Department of Arts and Culture
NHCC	National Heritage Conservation Commission
NTHA	National Tourism and Hospitality Act
NMB	National Museums Board
NP	National Park
NTP	National Tourism Policy
PPF	Peace Parks Foundation
REA	Rural Electrification Authority
RETOSA/SADC	Regional Tourism Organisation of Southern Africa/Southern African Development Community
RDA	Road Development Agency
RSZ	Railway Systems of Zambia
SACU	Southern African Customs Union
SAPU	Special Anti-Poaching Unit
SWOT	Strengths, Weaknesses, Opportunities and Threats
TAZARA	Tanzania Zambia Railway Authority
TCZ	Tourism Council of Zambia
TDF	Tourism Development Fund
TEVETA	Technical Education, Vocational and Entrepreneurship Training Authority
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UNWTO	United Nations World Tourism Organisation
VFR	Visiting Friends and Relatives
WEF	World Economic Forum
WTTC	World Travel and Tourism Council
ZATEX	Zambia Tourism Expo

## EXECUTIVE SUMMARY

The overall goal of this ZTMP is to direct the Government of Zambia's goal of significantly increasing the economic contribution of tourism to the Zambian economy, in support of Vision 2030 and the targets set in the 7<sup>th</sup> NDP. Zambia possesses excellent natural and cultural resources and tourism could become an important driver of socio-economic growth over the next decade. The Government has put in place a sound tourism policy and legislative framework to guide the growth of the sector. During recent years the sector has, unfortunately, not performed to its full potential. Maximising the country's tourism potential will require a bold vision, a collective public-private-community effort, commitment of human and financial resources, and above all, leadership from Government to 'champion' tourism development.

### Situation analysis

The situation assessment (*Chapter 2*) reveals a wide range of key success factors for future tourism growth, which can be summarised under five main growths "drivers, namely:

1. Need for a clear growth *direction*, including:

- A collective vision towards a step-change in tourism arrivals and earnings
- A strong and differentiated market positioning and brand that sets it apart from competitors
- Clear spatial priorities and phasing of tourism development
- Sufficient funding, skills and organizational arrangements

2. Improved tourist *access*, including:

- Streamlined visa and immigration arrangements
- Better international air connections
- Reduced domestic air travel costs
- Improved road connections to and within tourism centers

3. Expanded and affordable tourism *supply*, including:

- Reduced operating costs
- Improved quality of tourist attractions
- Greater diversity of destinations and touring circuits
- A broader range of accommodation options
- Improved service quality and skills
- Improved support services such as banking, entertainment, etc.

4. Effective destination *promotion*, including:

- Targeted promotion, both in terms of focused source markets and segmented promotion
- Improved funding for destination marketing
- Stronger partnerships between ZTA and the travel trade
- Investment and innovation in digital marketing

5. Improved *management* of the sector, including

- Reduced red tape and bureaucracy
- Strong public-private partnerships and collaboration
- Better government coordination at all levels
- Higher community ownership and benefits from the sector
- Commitment to sustainable development
- Strengthened law enforcement over natural and cultural resources
- More skilled tourism professionals managing public sector tourism at all levels
- Effective implementation and monitoring of progress

## Future growth direction

In terms of a future tourism growth direction for Zambia (*Chapter 3*) the following key developments and trends in the macro environment will no doubt have a significant bearing on Zambia's tourism growth prospects and are given particular consideration in preparing the future growth strategy:

- *Positive international and regional growth prospects:* Tourism in Southern Africa expected to grow on average at 4%-4.5% over the next 20 years, above the global average of 3.3% per annum.
- *Government's recognition of tourism as a driver of economic growth and development:* The 7<sup>th</sup> National Development Plan targets tourism as a key driver of economic diversification, geared towards reducing the country's reliance on copper mining and agriculture.
- *Growing demand for experiential travel:* Globally there is an increasing search for 'experiential travel'.
- *Emergence of international air hubs in Lusaka and Livingstone-Victoria Falls:* Various recent airport developments in Zambia and the region will no doubt impact positively on tourism development over the next decade.
- *Improved road links to tourism development areas:* While much investment is required to open up new tourism areas various road development projects have been launched over the past few years to improve road access.
- *Cross border linkages:* the recently established Kavango-Zambezi Trans-Frontier Conservation Area (KAZA) and introduction of a single KAZA visa will have a significantly positive effect on tourism.

A two-scenario approach was adopted in projecting future tourism growth. On the one hand a 'business as usual' or low growth choice is examined and compared with a 'visionary growth' or high growth choice which assumes that Government adopts the recommendations put forward in this National Tourism Master Plan. The scenario choice will have major implications for Zambia's tourism economy. The differences in outcomes between the Business-as-Usual scenario and the Visionary Growth scenario are large, including additional US\$3 billion per annum in international tourist revenues and more than 25,000 additional hotel rooms.

The following vision captures the ambitions of the Zambian tourism industry towards 2038:

*Zambia ranks among the most visited holiday destinations in Africa and is a regional conference hub with a high quality, diversified and sustainable tourism industry that is a major contributor to the economic and social well-being of Zambians*

Implementation of the assumptions in the Visionary Growth Scenario and adoption of Vision 2038 will provide the enabling environment for measurable growth objectives to be realised by 2038, including increasing international arrivals from 0.98million in 2018 to 2.61million in 2038; increasing the average length of stay from 4 days in 2018 to 6 days in 2038; significantly reduction in seasonality; increasing international tourism receipts from USD 562.9million in 2018 to USD 3,802.4 million in 2038 and creating approximately 163,000 new direct and indirect employment opportunities<sup>1</sup>

As key development principles, tourism development in Zambia towards 2038 will strive to be sustainable, build on public-private-community partnerships, be inclusive of the broader society, be well-planned, designed and managed and focus on quality.

Zambia will be positioned as the "mother/guardian" of the Zambezi, a positioning that conveys a sense of ownership of Africa's rivers and water bodies and strongly speaks to the diversity of experiences on offer and appeals to a wide variety of market segments. "Claiming" the iconic Zambezi River as basis for positioning is in recognition of Zambia's name being deducted directly from Zambezi and the Zambezi is one of the mightiest rivers in Africa; it is home to the mighty Victoria Falls, Zambia's most visited attraction; Zambia's most notable wildlife areas are all located in the Zambezi catchment area and most importantly the source of the Zambezi is located in Zambia.

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<sup>1</sup> Based on the international rule of thumb that every 30 additional tourists attracted create one direct and two indirect job opportunities

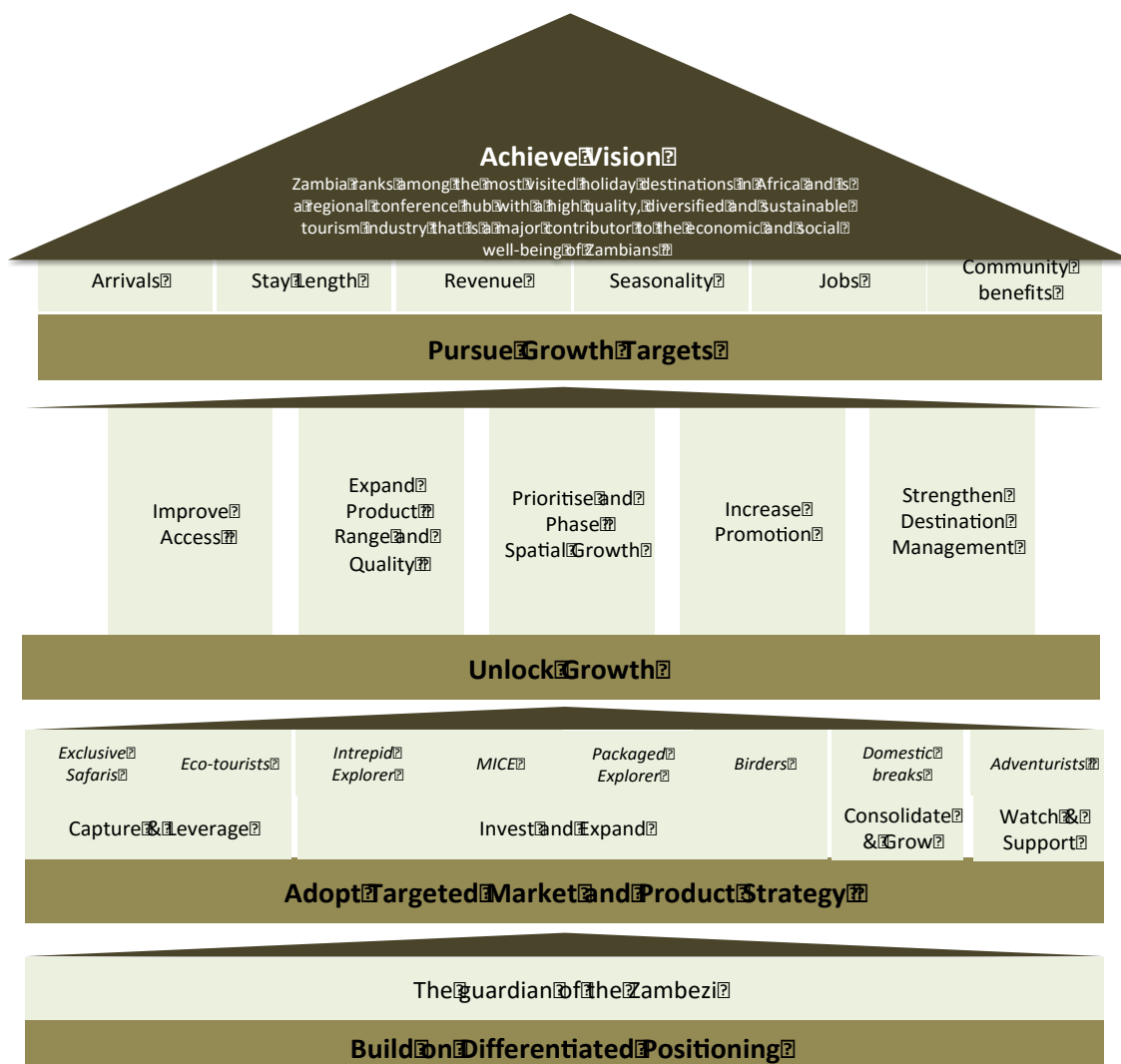
A targeted and segmented product and market development approach is adopted, as follows:

- *Capture and leverage* in the short term those market segments that offer good value and which Zambia is ready to receive. Apply approximately 30% of resources to market and develop Exclusive Safaris and Ecotourist segments.
- *Invest and expand* segments that offer major scope for growth, but where Zambia still needs to expand capacity of attractions, facilities and services to accommodate substantial growth in arrivals. Apply 50% of resources to develop and improve products for Packaged Explorers, Intrepid Explorers, MICE and niche markets such as Birders.
- *Consolidate and grow* domestic and regional breaks and apply approximately 20% of resources to consolidate available domestic market demand through targeted campaigns and messages.
- *Watch and support* smaller segments such as Adventure Sport and other niche segments.

Based on the findings of the situation analysis, achieving the targeted growth will require concerted strategies and actions in respect of key growth factors and the following goals are set in this regard:

1. Developing suitable tourism products in line with clearly defined spatial structure plan.
2. Providing easy and affordable tourist access.
3. Creating a favourable business and investment climate.
4. Raising demand for destination Zambia.
5. Strengthening the management of the sector.

The future strategic direction can be summarised as follows:



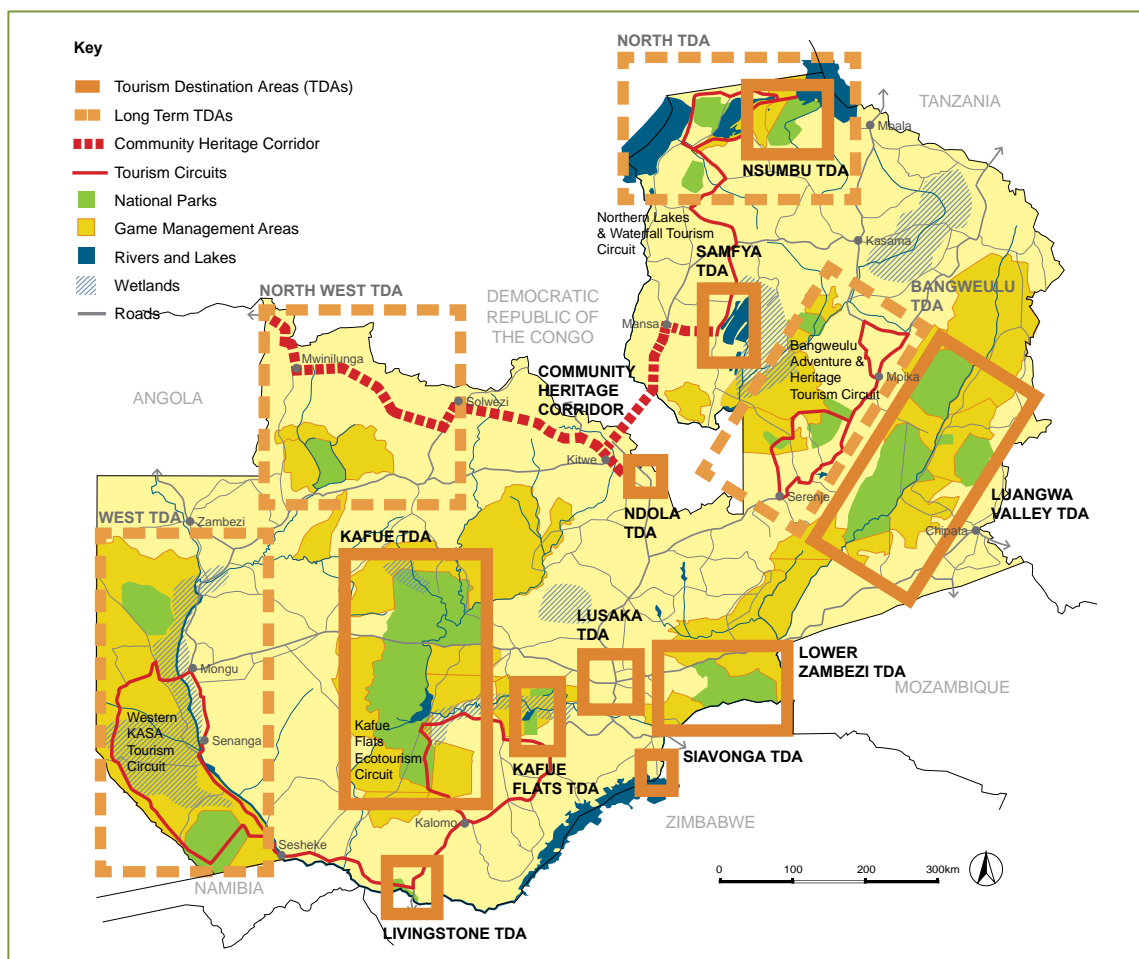
## Structure plan

The spatial tourism structure plan (*Chapter 4*) identifies 14 zones as potential tourism development areas, based on an analysis of potential tourism attributes. The following ten are considered priority areas:

1. Lusaka – core area and Lusaka NP.
2. Siavonga – town and waterfront.
3. Kafue Flats – Lochinvar NP, Blue Lagoon NP and surrounds.
4. Livingstone – town, Victoria Falls and Mosi-oa-Tunya NP.
5. Kafue – Kafue NP and surrounding area.
6. Lower Zambezi – Lower Zambezi NP and surrounding area.
7. Luangwa Valley – South Luangwa NP, North Luangwa NP and surrounding area.
8. Samfya – waterfront and peninsula.
9. Kasaba Bay – the bay and Tanganyika lake shore
10. Ndola/Copperbelt – town and surrounds

In the longer term, four further TDAs can be developed:

11. North TDA – expansion of Kasaba Bay TDA, Nsumbu NP, Mweru Wantipa NP, Lusenga NP, lakes and waterfalls.
12. Bangweulu TDA – Kasanka NP, Lavushi-Manda NP, Isangano NP, heritage sites
13. North West TDA – West Lunga NP and surrounding forest areas.
14. The West TDA – Sioma Ngwezi NP, Liuwa NP, West Zambezi GMA.



To link the various TDA the Plan includes the development of tourism corridors and circuits with appropriate signage, and interpretative information and linkages. These are the Kafue Flats ecotourism circuit, western KAZA tourism circuit, Bangweulu adventure and heritage tourism circuit, the Northern community heritage corridor and the Northern Lakes and waterfalls tourism circuit.

Development will be spatially managed in three phases, namely:

- *Phase 1 Stepping-up (Years 1-6):* Preparing the ground and initiating a portfolio of tourism developments in TDAs that offer short-term expansion opportunities for ensuring a “step-change” in tourism arrivals.
- *Phase 2 Escalation (Years 7-12):* Capitalising on the investments and expansions made during Phase 1, when these will come on stream and other aspects of the plan (e.g. improved air and road access, promotion, training, etc.) have been addressed. Rapid growth and investment expansion is expected during this phase.
- *Phase 3 Continuous growth: (Years 13-20):* Continuing the growth momentum achieved during Phases 1 and 2, when tourism should be well-stabilised and the main tourism areas should provide a range of core attractions to attract a variety of market segments.

## **Growth strategies and actions**

*Chapter 5* proposes specific strategies and actions for addressing the five core strategic goals, and these can be summarised as follows:

### ***Goal 1: Develop innovative tourism products and attractions***

#### *Strategy 1.1: Implementing Tourism Action Areas (TAAs) in identified Tourism Development Areas (TDAs)*

- Prepare and develop Lusaka as Zambia’s MICE hub, including: Lusaka Urban Design Strategy, Lusaka Visitor Information Programme, rehabilitation of Kabwata Cultural Village and improvement of Lusaka NP
- Develop Livingstone as Zambia’s international tourism entry hub, including: Livingstone visitor information programme, Livingstone town centre urban design strategy, improvement of Mosi-oa-Tunya NP and Victoria Falls World Heritage Site, Livingstone hillside resort development, Livingstone cultural village redevelopment and Livingstone community development programme.
- Develop Kafue NP and Lake Itzhi Tezhi as larger scale international safari centre and resort hub, including: Kafue NP infrastructure improvement, Itzhi Tezhi lakeside resort, Chunga tourism resort and Itzhi Tezhi community development programme.
- Strengthen and expand tourism in Luangwa Valley, including South Luangwa NP infrastructure improvement, North Luangwa NP infrastructure improvement, South Luangwa NP expansion programme and South Luangwa community development programmes.
- Ensure sustainable tourism development in Lower Zambezi including Lower Zambezi NP infrastructure improvement and Chiawa GMA community development programme.
- Package and promote Samfya and Bangweulu including Samfya corniche improvement, Samfya peninsula Beach Park and Bangweulu adventure and heritage tourism circuit.
- Strengthen Siavonga as a domestic resort hub including Siavonga urban design strategy, Siavonga waterfront plaza, Siavonga water sports centre and Siavonga visitor information programme.
- Strengthen and expand tourism in Nsumbu and the North, including improving Nsumbu NP, Nsumbu community development programme, Kasaba Bay tourism resort and Northern Lakes and Waterfalls tourism circuit.
- Develop and package Kafue Flats tourism offer, including Lochinvar NP improvement, Kafue Flats GMA community development programme and the Kafue Flats ecotourism circuit.
- Improve tourism packaging and capacity in the Copperbelt and develop a Copperbelt

community heritage tourism corridor, including Ndola visitor information programme, the community heritage corridor.

- Developing and package Western KAZA tourism circuit.

*Strategy 1.2: Developing overland touring circuits*

- Adopt a participative process in identifying and developing viable tourism circuits

*Strategy 1.3 Advancing cultural tourism*

- Review and adapt the concept of government-operated cultural villages
- Identify and support a few viable community cultural tourism initiatives as success models of cultural tourism development
- Establish a community cultural tourism support programme
- Improve the quality and relevance of museums in tourism areas

*Strategy 1.4 Restocking National Parks*

- Launch a restocking programme for Southern Kafue
- Lease out depleted parks and game management areas for game ranching on restock-operate-transfer basis
- Further expand collaboration with international and local conservation partners

**Goal 2: To provide easy and affordable tourist access**

*Strategy 2.1 Improving flight linkages from key international markets*

- Launch an air access support programme
- Canvass foreign and local airlines to provide international flights from Europe directly to Zambia and build airline partnerships

*Strategy 2.2 Capitalising on growth in foreign air supply in the broader region*

- Set up Zambian immigration facilities at Victoria Falls International Airport
- Facilitate distribution of visitors from international air hubs to tourism growth points

*Strategy 2.3 Reducing costs of domestic air travel*

- Reduce relevant air operational charges on domestic scheduled and charter routes
- Improve fuel supply at selected smaller airfields
- Strengthen communication and partnerships between authorities and air operators

*Strategy 2.4 Easing immigration conditions for key markets*

- Remove or reduce visa requirements for key tourism source markets
- Remove or reduce tourist vehicle overland entry charges and simplify procedures
- Improve tourist reception facilities at border posts
- Instil a tourism-friendly culture at border posts

*Strategy 2.5 Improving road linkages to and in key attractions*

- Include planning, development and maintenance of road in national Parks under the mandate of RDA
- Set up a specialist 'tourist unit' in RDA

**Goal 3: To create a favourable business and investment climate**

*Strategy 3.1 Improving land tenure and encouraging investment in tourism priority zones*

- Formulate and update management plans for all conservation areas
- Promulgate and implement a transparent and consistent concessions policy for nature tourism areas

- Provide VAT relief for products required to activate priority Tourism Development Areas
- Exempt MICE delegates to Lusaka from paying VAT
- Remove VAT and important duties on dedicated tourism vehicles and equipment

*Strategy 3.2 Reducing investor cost and bureaucracy of doing business*

- Improve public-private liaison regarding tourism development constraints and ensure implementation and follow through of decisions
- Engage the local financial sector to foster an improved understanding of tourism financing opportunities
- Improve tourism functionality at “one-stop-shop” business centres
- Reduce the number of licenses required from tourism businesses and simplify the licensing process

*Strategy 3.3 Improving law-enforcement and protection of wildlife and other natural and cultural resources in parks and protected areas*

- Increase DNPW financing and capacity for nature law enforcement and especially anti-poaching
- Further strengthen public-private partnerships in conservation and law enforcement

*Strategy 3.4 Improving community benefits from non-consumptive tourism*

- Implement suitable mechanisms to ensure communities get a share of non-consumptive tourism revenues e.g. Land user charges, Share of gate revenues, Tourist contribution fee
- Use the Tourism Development Fund as distribution mechanism for community fees
- Improve auditing and governance of CRB funds
- Plan all GMAs to separate hunting and photographic tourism

*Strategy 3.5 Upgrading quality standards*

- Implement a relevant and practical classification and grading system
- Develop a register of professional skills providers for qualitative advice to first time tourism sector investors
- Improve medical provision and emergency services for tourism

*Strategy 3.6 Developing tourism human resources*

- Increase the extent of skills training supply
- Ensure that tourism training supply and content matches industry needs
- Improve the quality of tourism skills training facilities, staff and curricula
- Improve skills and service levels in the workplace
- Encourage entry of skilled workers from elsewhere in certain specialised areas
- Improve tourism awareness, understanding and skills at school level

**Goal 4: To raise demand for destination Zambia**

*Strategy 4.1 Evolving and strengthening Zambia’s tourism brand proposition*

- Strengthen the destination brand proposition and slogan
- Refresh the brand identity and imagery
- Form a tourism crisis communication work group
- Formulate and implement a tourism crisis communication plan
- Form a local national-provincial-local marketing partnership forum
- Agree a protocol for joint branding and marketing

*Strategy 4.2 Focusing international marketing in high-potential source markets*

- Develop a 3-year promotion plan for target international source markets



- Create a realistic balance between domestic and international marketing

*Strategy 4.3 Strengthening and expanding ZTA's marketing capacity*

- Significantly increase ZTA's marketing budget, through a special budget allocation
- Prioritise marketing for funding allocation from the Tourism Development Fund (TDF)
- Appoint specialized destination marketing representatives in key international markets
- Establish a dedicated MICE unit
- Strengthen online marketing

*Strategy 4.4 launching a multi-year promotion campaign*

- Devise campaign imagery and collateral
- Build partnerships and alignment with marketing campaign
- Coordinate all marketing activities in support of a campaign roll-out programme
- Launch a dedicated domestic advertising campaign during the slower season

*Strategy 4.5 Strengthening travel trade marketing*

- Exhibit at selected Trade Fairs
- Ensure regular communication with the travel trade
- Invest in suitable Joint Marketing Agreements in core markets
- Build capacity of inbound Zambian operators
- Conduct sales missions and workshops in Core markets
- Arrange trade familiarisation visits for Core and Invest markets
- Launch "Secrets of the Zambezi" agent affiliation program

*Strategy 4.6 Leveraging travel media exposure and public relations*

- Produce and publish a press kit
- Publish and promote celebrity stories
- Strengthen media relations
- Arrange travel press trips
- Track and measure media value

*Strategy 4.7 Repositioning ZATEX*

- Strengthen logistics of ZATEX
- Upscale the domestic consumer component of ZATEX
- Focus on engaging and attracting the regional travel trade as buyers

*Strategy 4.8 Strengthening the MICE (Meetings, Incentives, Conventions, Exhibitions and Events) sector*

- Develop and implement a dedicated MICE marketing plan
- Improve facility standards in the MICE sector
- Identify and support a portfolio of three to five flagship 'Zambia Great Events'

*Strategy 4.9 Prioritising online marketing tools and promotion*

- Improve the official ZTA website
- Populate, maintain and promote a range of social media accounts
- Engage in a content drive and partnerships
- Launch special digital marketing campaigns in support of the overall promotion campaign
- Leverage online affiliates
- Further expand the database and Customer Relationship Management (CRM) system
- Conduct effective email marketing

*Strategy 4.10 Expanding visitor information services*

- Improve the visitor information office network at entry points

- Expand local online visitor information services

**Goal 5: To strengthen the management of the sector**

*Strategy 5.1 Elevating the status of tourism as a national priority*

- Establish a presidential tourism council
- Establish a public-private Tourism Liaison Committee (TLC)

*Strategy 5.2 Ensuring effective implementation and monitoring of plans*

- Establish a project management unit (PMU) within MOTA, reporting directly to the PS
- Establish a technical assistance programme (TAP) within the PMU

*Strategy 5.3 Streamlining and strengthening public sector tourism capacity*

- Conduct an audit of staff capacity and strengthen tourism-related skills in the Ministry
- Review roles of the Department of Tourism and ZTA
- Strengthen and structure ZTA to fulfil its mandate
- Investigate, streamline and align culture and heritage management capacity
- Establish a specialist tourism function in DNPW
- Strengthen provincial and local government tourism capacity and resources
- Audit and if necessary restructure the Hostels Board of Management
- Create strong, viable local tourism partnerships

*Strategy 5.4 Improving the quality and reliability of tourism statistics and research*

- Conduct a thorough assessment and improvement plan of the procedures, processes and technicalities of producing domestic and international visitor arrivals data
- Form multi-party tourism statistics workgroup
- Conduct high quality visitor research
- Eliminate bureaucracy and duplication in statistics collection
- Improve skills capacity in tourism statistics and handling

*Strategy 5.5 Improving funding for implementing the tourism strategy*

- Significantly increase Government budget allocation for tourism
- Replace the bed levy with a departure tax on air tickets

**Tourism development area (TDA) plans**

*Chapter 6* unpacks and addresses in more detail the proposals contained in the structure plan.

**Implementation action plan**

The Master Plan concludes in *Chapter 7* with a detailed implementation action plan that tabulated the strategies and actions and indicates:

- Who should lead each action
- Which partners should support the implementation
- Cost estimate or directive.
- Measurable success indicator(s)

The action plan provides a clear framework for measuring and monitoring the level and success of implementing the ZTMP.

# Chapter 1: Introduction

## 1.1 Background

Zambia's Vision 2030 and the proposed Seventh Zambia National Development Plan (2017-2021) (7<sup>th</sup> NDP) recognize tourism as an important economic sector for economic diversification and as a principal source of foreign exchange and employment creation. The sector's performance is clearly below potential considering the country's rich natural and cultural heritage and political stability.

To fulfil the tourism ambitions of Vision 2030 the tourism sector has to grow at a much faster rate. This implies achieving above-average growth in tourist arrivals, tourism receipts, tourism-related jobs and tourism investment. This Zambia Tourism Master Plan (ZTMP) aims to present an achievable and holistic 'road map' for significant tourism growth over the next decade.

The overall goal of the ZTMP is to direct the Government of Zambia's vision of significantly increasing the economic contribution of tourism to the Zambian economy, in support of the targets set in the 7<sup>th</sup> NDP, in terms of:

- International and domestic tourist arrivals.
- Receipts per tourist arrival i.e. higher expenditure and longer stay per visitor.
- Direct and indirect tourism jobs.
- Tourism economic and employment benefits for local people.
- Investment in tourism related facilities and infrastructure.

Zambia is a large country with a varied topography, moderate climate and an abundance of water bodies, including major rivers and lakes, of which the Zambezi River (with the Victoria Falls), the Kafue River, the Luangwa River and Lake Kariba and Tanganyika are the most famous. The country is rich in natural resources, being home to more than 5,543 plant, 242 mammals, 757 bird and 490 fish species. There are 20 national parks and 36 game management areas, about one-third of the country's area. South Luangwa has one of Africa's largest elephant populations<sup>2</sup>.

Traditional culture is evident through a number of colourful annual traditional ceremonies. Arts and handicraft are mainly in pottery, basketry, stools, fabrics, mats, wooden carvings, ivory carvings, wire craft and copper crafts. Zambian traditional music is typically based on drums, accompanied by singing and dancing.

Zambia has had one of the world's fastest growing economies for the past ten years, with real GDP growth averaging roughly 6.7% per annum, though growth slowed in 2015 to just over 3%, due to falling copper prices, reduced power generation, and depreciation of the kwacha. Government has prioritised infrastructure development, such as roads, airports and rail as key growth factors and has invested heavily in the construction, rehabilitation and upgrading of the transport infrastructure<sup>3</sup>.

## 1.2 Status of tourism planning and policies

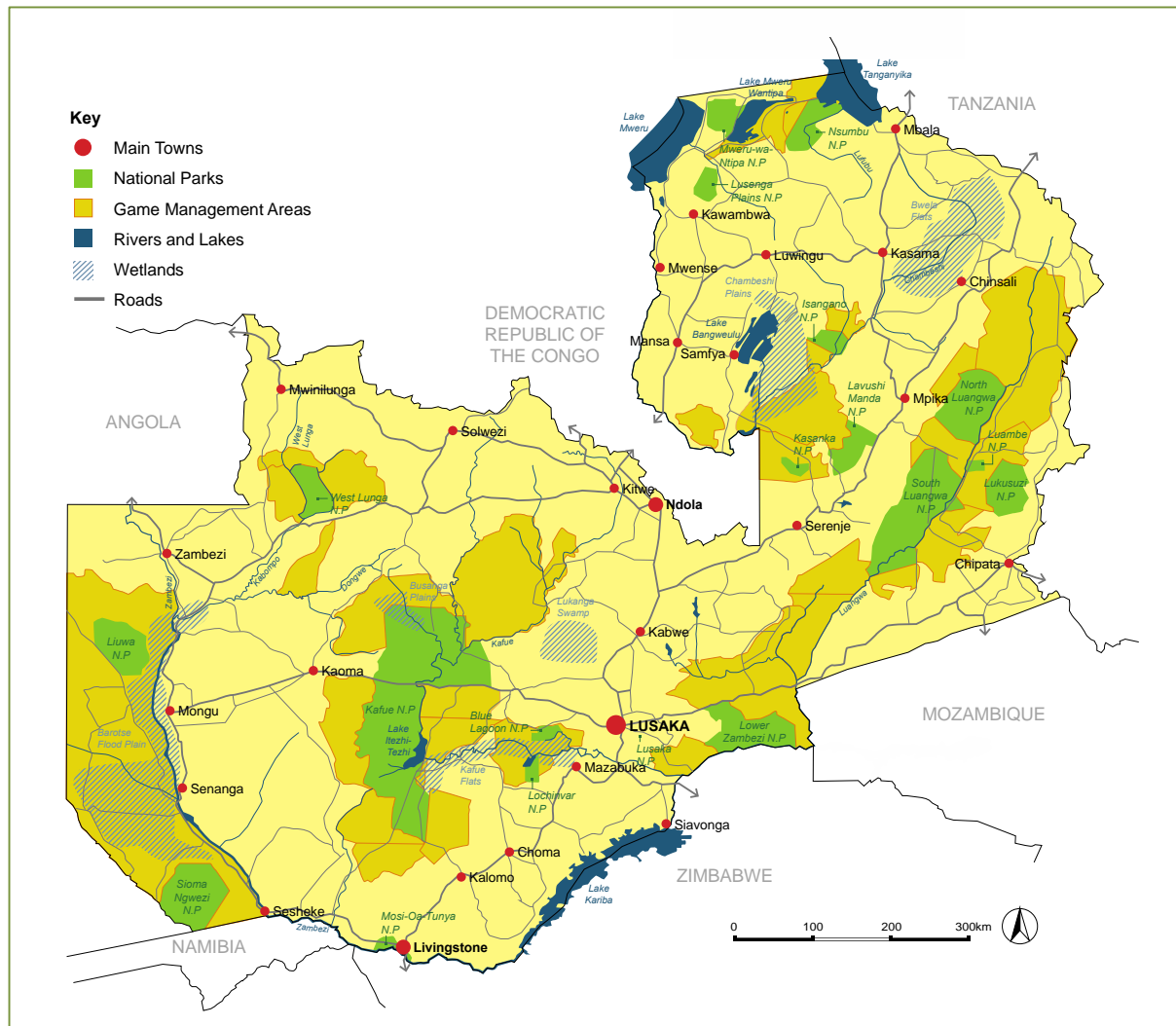
To achieve middle-income status, Vision 2030 sets a number of ambitious and measurable socio-economic development objectives, among others to attain and sustain annual real economic growth rates of between 6% and 10% p.a. Government undertakes to create the environment and investment climate consistent with the socio-economic development objectives through improving the banking and finance sector, eliminating government bureaucracy and red tape, strengthening law enforcement in the mining sector, infrastructural improvements, encouraging skills training and technology innovation and ensuring access to information and citizen participation in the country's development.

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<sup>2</sup> [www.commonwealthofnations.org](http://www.commonwealthofnations.org)

<sup>3</sup> [www.commonwealthofnations.org](http://www.commonwealthofnations.org)

Figure 1.1 Map of Zambia



The 7th NDP serves as a five-year, practical development strategy in support of Vision 2030. Among others it aims to achieve average annual economic growth of more than 5%, create one million productive and gainful job opportunities and increase the share of earnings of non-mining exports to about 50%. Tourism features strongly in the quest for economic diversification, which is geared towards reducing the country's reliance on copper mining and agriculture, both of which have failed to significantly reduce poverty and eradicate hunger, especially in rural areas.

The 7th NDP includes five key strategies, namely: a) *improving tourism-related infrastructure*, b) *promoting diversification of tourism products*, c) *promoting tourism in key source markets*, d) *promoting domestic tourism* and e) *Restocking national parks*.

The strategies and actions proposed in this ZTMP will build on the proposals of the 7th NDP and this document should be regarded as the dedicated sector strategy and implementation plan for the tourism component of the 7th NDP.

Zambia's first (and existing) tourism master plan<sup>4</sup> was drafted in 1978. The plan concluded that Zambia fared poorly compared to competitors and proposes a three-phase strategy to improve competitiveness, namely:

<sup>4</sup> Government of Zambia (1978): Masterplan for development of tourism potential, report prepared for the Government of the Republic of Zambia and the Commission of the European

- Organisation for growth.
- Establish Zambia as a Holiday destination in the market place.
- An aggressive and dynamic promotional campaign.

The plan made numerous findings and contained a wide spectrum of development and marketing proposals. Unfortunately, the plan does not contain a measurable implementation action plan, making it difficult to thoroughly take stock of its implementation. Due to a changing public-private dynamic, changes in the operating environment since 1978 and limited implementation of proposals contained in the plan, this ZTMP is a timely initiative for setting and implementing a new tourism growth direction.

From a policy perspective the National Tourism Policy of 2015 sets the direction for future tourism growth and development. It states that the Government aims to be among the top five tourist destinations of choice in Sub-Saharan Africa by 2030.

Some key objectives stated in the NTP are to recognise the real value of careful tourism planning, to encourage partnerships with the public and private sector adopting a “whole of Government” approach, to strengthen backward and forward linkages, to ensure community involvement and to position the tourism sector as a major contributor to job creation, foreign exchange earnings and poverty reduction. Tourism development measures highlighted include promotion of domestic tourism, development of tourism infrastructure, promotion of “green” tourism, diversifying the product through investment in various product niches, improving standards in the sector, providing training and capacity building and making Zambia a regional hub for tourism. *In summary*, the NTP provides excellent, though broad and all-encompassing guidelines for developing tourism in a sustainable and integrated manner.

The National Tourism and Hospitality Act (NTHA) of 2015 emphasises a ‘Whole Government Approach’. Two provisions of the new Tourism Act are particularly noteworthy, namely:

- Transfer of the regulatory functions (licensing and grading) from the Department of Tourism to the Zambia Tourism Agency and
- Provision for a tourism bed levy and establishment of a dedicated Tourism Development Fund (TDF) for managing the proceeds of the levy.

The Situation Analysis (Volume 1) provides a detailed summary of the other tourism-related plans. Of these:

- Only five of the 20 NPs have current Game Management Plans (GMPs) in place. Five GMPs require review. Seven GMPs are being prepared or are waiting government approval. The remaining three NPs have no GMPs.
- Only 18 of the 36 Game Management Areas (GMAs) have GMPs in place.
- Three district Integrated Development Plans (IDPs) have been drafted under the new Planning Act and are awaiting government approval – Mpika, Samfya and Siavonga – but these have little tourism content.
- Livingstone benefits from several tourism plans, strategies and working papers, but none has any legal status. An earlier IDP was prepared in 2006.

Further development of the tourism sector will demand resources, capable management and vision to implement the many projects and programmes contained in the above planning documents. In organisation and management terms, coordination of efforts by developers, government agencies and local communities in a spirit of constructive teamwork is a prerequisite for success. MoTA’s role is to be the leading catalyst in this process.

## Chapter 2: The Existing Situation<sup>5</sup>

### 2.1 The tourism economy

The expectations and strategy ahead should be viewed within the context of the global, regional and national tourism economic context.

#### 2.1.1 Tourism performance

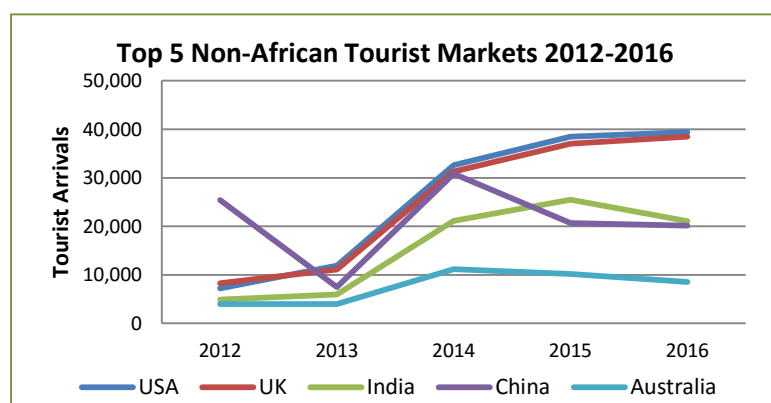
According to United Nations World Tourism Organisation (UNWTO)<sup>6</sup>, international tourist arrivals have grown from 25 million globally in 1950 to 1,235 million in 2016 while international tourism receipts earned worldwide have similarly expanded from USD 2 billion in 1950 to USD 1,260 billion in 2015. The past decade has seen some weakening of Europe's overall market share, compared with a strengthening of Asia Pacific's market share and while Africa's overall market share declined from 4.9% in 2014 to 4.7% in 2016, arrivals in the Sub-Saharan Africa sub-region (including Zambia) grew strongly at 12.3% in 2016.

In Southern Africa, South Africa is the leading regional tourism destination (41% of SADC arrivals in 2015) with Botswana and Zimbabwe continually challenging for second place (9% of arrivals in 2015), some distance behind. Zambia has seen almost 14% growth in visitor arrivals over the five years but its overall share of the total arrivals in the RETOSA/SADC countries combined has remained static at around 4% throughout the period. Although Zambia's share of tourism receipts does not match its share of arrivals, UNWTO data show that its share of tourism receipts grew from 0.4% of total African receipts in 2005 to 1.6% of African receipts in 2015.

According to Zambia's MoTA data<sup>7</sup>, direct earnings from tourism have grown from ZMK 2.27 bn in 2012 to ZMK 4.41 bn in 2015, although in US Dollar terms this represents a decline from USD 441m to USD 401 due to depreciation of the Kwacha. Tourism's contribution to GDP has grown from 2.4% in 2012 to 3.1% in 2015, according to World Travel and Tourism Council (WTTC)<sup>8</sup>. MoTA<sup>9</sup> also indicates that direct employment in tourism grew 0.7% between 2014 and 2015 from 57,003 to 57,384 persons.

International tourist arrivals grew from 815,000 in 2015 to 956,000 in 2016. In common with all the other SADC member countries, Zambia draws by far the largest percentage (78%) of its tourist arrivals from the rest of Africa, with Europe at 9.2% and Asia at 7% of arrivals in 2016, reflecting a weakening in arrivals from China and a strengthening of arrivals from the USA and UK, as shown in Figure 2.1 below.

**Figure 2.1: Performance of Top Non-African Markets 2012-2016**



Source: MOTA Tourism Statistical Digests

In view of the dominance of Africa as the main source of visitor arrivals and the importance of neighbouring countries in particular, it is unsurprising to note that arrival by road also dominates the means of transport used by visitors to Zambia (69% of arrivals) followed by air transport (30% of arrivals) with water and rail transport accounting for the balance (1% of arrivals), in 2016<sup>10</sup>.

Most arrivals from African

<sup>5</sup> NOTE: This chapter is a summary and should be read with ZTMP Report Volume 1: Situation Analysis

<sup>6</sup> UNWTO Tourism Highlights 2016 and UNWTO Tourism Barometer March 2017

<sup>7</sup> Ministry of Tourism and Arts, 2015 Tourism Statistical Digest

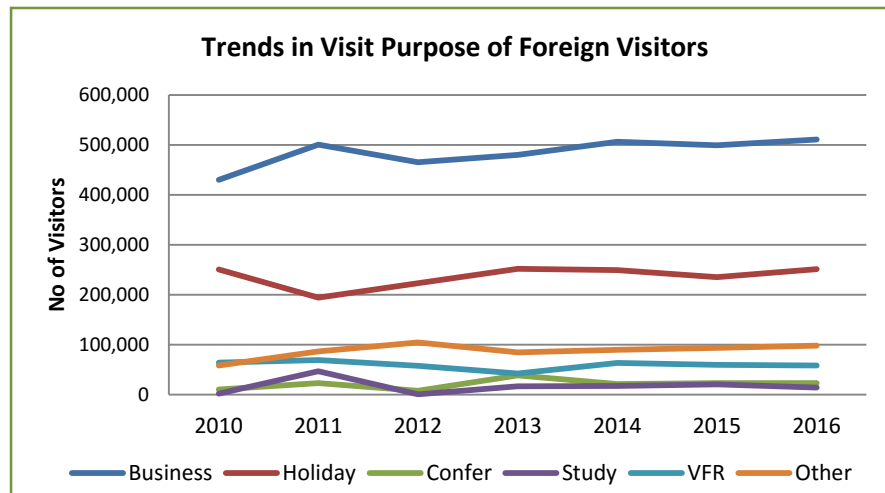
<sup>8</sup> WTTC Travel and Tourism Economic Impact Report for Zambia 2017

<sup>9</sup> MOTA 2015 Tourism Statistical Digest

<sup>10</sup> MOTA International Tourists Arrivals Statistics Summary 2017

countries travel by road while most arrivals from outside Africa travel by air. Zambia has 47 ports of entry of which 42 are land borders, four are at international airports and one is at a seaport on Lake Tanganyika.

**Figure 2.3 Trends in Visit Purpose of Foreign Visitors 2010 - 2016**



Business visitors is consistently the largest category with 510,851 arrivals in 2016, holiday purposes with 251,336 arrivals is consistently in second place, the ‘other’ category is in third place with 97,993 arrivals and VFR (visiting friends and relatives) is in fourth place with 58,536 arrivals. Business visitors have remained constant at 53% of arrivals since 2010, holiday visitors

Source: MoTA International

Tourists Arrivals Statistics Summary 2017

have declined from 31% to 26% of arrivals since 2010 and VFR arrivals have fallen from 8% of the total to 6%. The share of arrivals for conferencing (2%), study (1.5%) and other purposes (7%) has grown steadily from small bases

The seasonality pattern broadly follows that of the nation’s weather, a wet season in December to April and a dry season May to November that also constrains and enables internal travel respectively and influences the timing of holiday visitors in particular. Most safari businesses /lodge owners only operate between mid-May and mid-November, roughly a six-month season, whilst hotels and guest houses in urban centres generally operate around the year. The limited network of all-weather roads in parks contribute to seasonality in the safari industry.

The average length of stay for arrivals as shown in the 2015 MoTA Annual Tourism Statistical Digest is four days, having slipped back from 6 days in 2012 and 2013 and demonstrating the fact that Zambia is largely an “add-on” option for leisure visitors, rather than an end destination.

In 2015, the supply of MoTA licensed accommodation in Zambia stood at 1,172 establishments with a total of 43,119 rooms. Lusaka Province and Southern Province (Livingstone in particular) account for almost two thirds of licensed accommodation in Zambia and their respective business and tourism importance draws the greater part of all visitor arrivals. Entry into Zambia by air accounts for 30% of all arrivals and 66% of them fly into Kenneth Kaunda International Airport in Lusaka, 20% fly into Livingstone and the remaining 14% mostly fly into Ndola, the capital of the economically important Copperbelt Province. Average annual national room occupancy achieved in 2015 was 69.8% (2014 was 61.9%) according to MoTA data.

While domestic tourism has limited coverage in the MoTA Annual Tourism Statistical Digest, figures from NHCC and DNPW show that in 2016, 116,260 (69%) of visitors to the Victoria Falls, 41,772 (39%) of visitors to the five major national parks and 69,170 (90%) of visitors to National Museums are domestic visitors. The daily expenditure and length of stay per domestic citizen is much lower than for foreign visitors and that growth in volumes of domestic travellers do not translate into equivalent growth in tourism revenues.

The MoTA 2015 Tourism Statistical Digest mentions various limitations associated with visitor arrival and accommodation sector data collection are outlined and show that currently tourism statistics are largely flawed implying that the validity and reliability of statistics is limited.

## 2.1.2 Price and overall competitiveness

The World Economic Forum's (WEF) Travel and Tourism Competitiveness Report<sup>11</sup> indicates that Zambia's overall global rank is 108<sup>th</sup> place out of 136 participating nations compared to 107<sup>th</sup> place in 2015. Zambia ranks 9<sup>th</sup> in Southern and Eastern Africa, placing it behind South Africa, Namibia and Botswana, but ahead of Zimbabwe and Lesotho. Zambia scores best under Environmental Sustainability (33<sup>rd</sup>), Natural Resources (46<sup>th</sup>) and Business Environment (52<sup>nd</sup>) but worst with Health and Hygiene (131<sup>st</sup>), Cultural Resources and Business Travel (119<sup>th</sup>), ICT Readiness (118<sup>th</sup>), Air Transport Infrastructure (117<sup>th</sup>), Tourist Service Infrastructure (114<sup>th</sup>) and Ground and Port Infrastructure (113<sup>th</sup>).

A comparison of prices of four and five star hotels shows that Lusaka base prices compare favourably with Johannesburg. However, taxation on the base hotel room rate is 15% in South Africa (14% VAT+1% City Levy) and 27.5% in Zambia (16% VAT+ 10% Service + 1.5% Tourism Levy) suggesting that if taxation in each country was broadly similar then Zambia's hotel pricing could be more competitive than it is at present. A comparison of lodge prices between Zambia, Botswana, Zimbabwe, Namibia and Tanzania, indicates that Zambian rates are on average lower than those in Botswana, higher than those in Zimbabwe and similar to those in Namibia and Tanzania.

Zambia's National Park entry fees are midway between the higher cost structures found in Tanzania and the much lower costs charged in neighbouring Botswana and Namibia, and similar to those applicable in South Africa and a little lower than those being charged in Zimbabwe.

Zambia has the second highest prices for gasoline and diesel in Southern Africa while Botswana and Namibia have the lowest prices with gasoline at almost half the Zambian price in Botswana. Zambia's aviation fuel is, however, low compared to Botswana and Namibia.

Airfares from London to Lusaka compare favourably to other capital cities in the region, except for the highly competitive and more affordable London-Johannesburg route. Airfares from both London and Johannesburg to Livingstone are substantially higher compared to fares from these destinations to Victoria Falls in Zimbabwe. This is a cause for concern given the position of Livingstone as Zambia's main leisure tourism entry point to Zambia. Scheduled domestic air services are operated by only one airline in Zambia, Proflight. An indicative comparison of return ticket prices for selected tourist locations in the region shows that Proflight prices are comparatively much higher than the ticket prices on other domestic routes in the sub-region.

## 2.1.3 Key success factors for enhanced tourism economic performance

- *Significantly expanding foreign leisure tourism volumes and value* by increasing the number of leisure and MICE visitors, increasing the length of stay and increasing the average expenditure per day.
- *"Bulking up" international tourism volumes* by filling the gap between low cost and high-end market segments and penetrating the lucrative, medium-spending international market segment.
- *Developing and implementing a consistent domestic tourism strategy* given that the growth in domestic tourism is expected to be gradual and should be based on realistic targets and growth expectations.
- *Reducing tourism seasonality and aiming to become a year-round tourism destination* including diversifying markets, improving access and road infrastructure in protected areas and differentiating product pricing, etc.
- *Spreading tourism more widely* in the country and unlocking new market segments.
- *Improving tourism affordability and value for money* especially in internal air travel, tourism operating costs and taxation
- *Improving the quality and reliability of tourism statistics and research* including immigration data, accommodation performance, and visitor expenditure and motivation research.

<sup>11</sup> World Economic Forum Travel and Tourism Competitiveness Report 2017



## 2.2 Tourism resources

Tourism is largely based in the natural resources of the country including the exceptional concentration of game, particularly in the Luangwa Valley and Lower Zambezi and its adventure activities – white water rafting, game fishing, bungee jumping, canoe safaris, hunting and Victoria Falls – a ‘must see’ attraction.

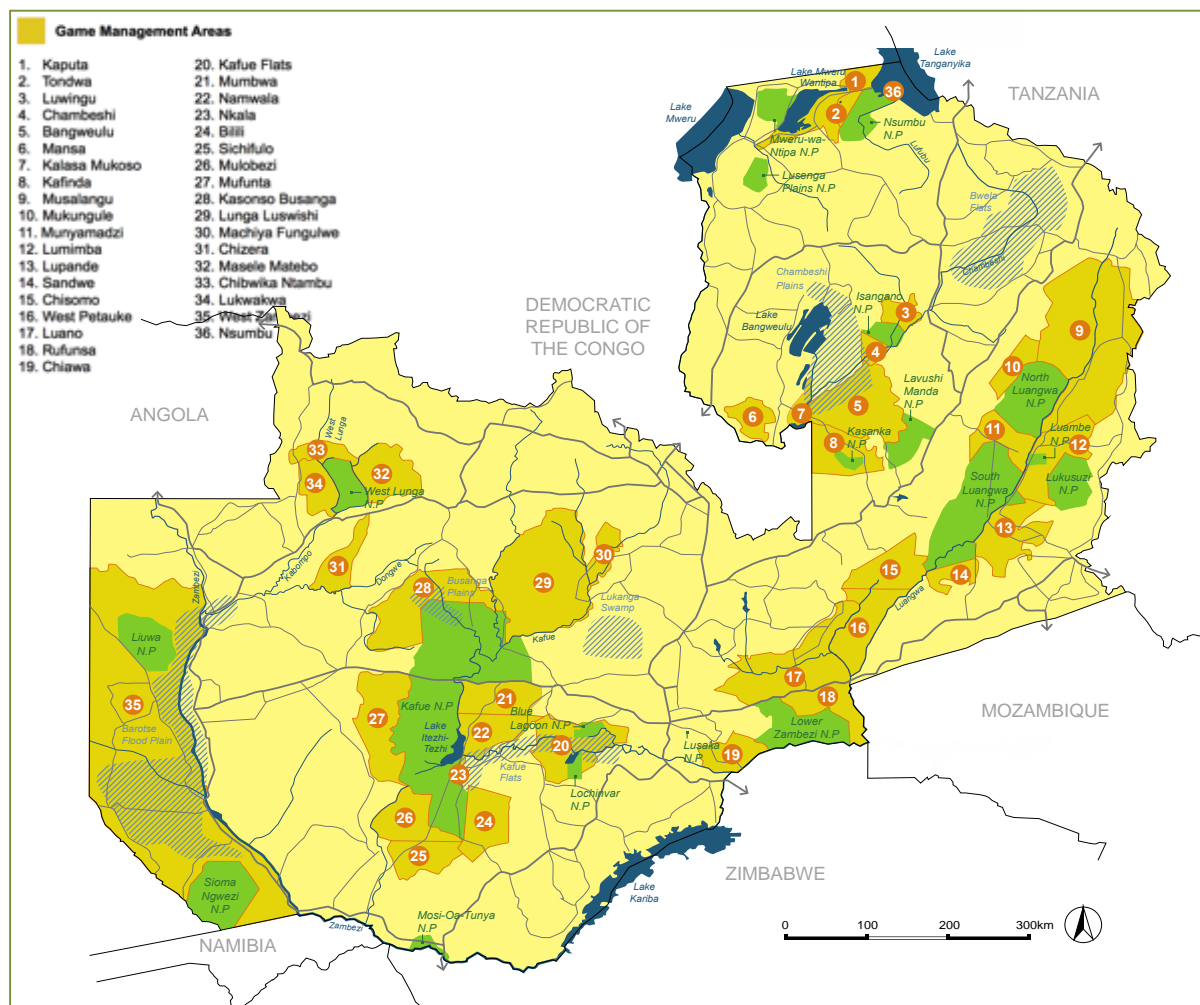
The uncrowded, friendly atmosphere, natural unspoilt environment, together with its heritage and cultural resources, provide a basis for developing a much more diversified, tourism product. Wildlife and adventure are cited as the major attractions. However, to date, little attention has been given to the country’s cultural and historical attributes.

### 2.2.1 Natural resources

There are principally three types of protected area. The first type consists of 20 National Parks, 36 GMAs and eight Ramsar wetland sites. The second type comprises over 450 forest reserves, while the third type consists of national heritage sites. There is also a significant number of game ranches scattered across the country managed by private owners.

The National Parks together with the GMAs cover around 30% of the country, as presented in Figure.... below.

**Figure 2.4: National Parks and Game Management Areas**



A major challenge facing future tourism growth in and around national parks is the lack of management integration between national parks and their surrounding GMAs. While the State is the overall landowner and manager on behalf of the Zambian population, concessions and land usage in GMAs is often

determined by traditional leaders who do not always have the same vision as the DNPW for the parks and their buffer zones. As a result, conflicts between non-consumptive (photographic tourism), consumptive (hunting and fishing), subsistence (hunting, fishing and resource harvesting) and agricultural activities in GMAs are common.

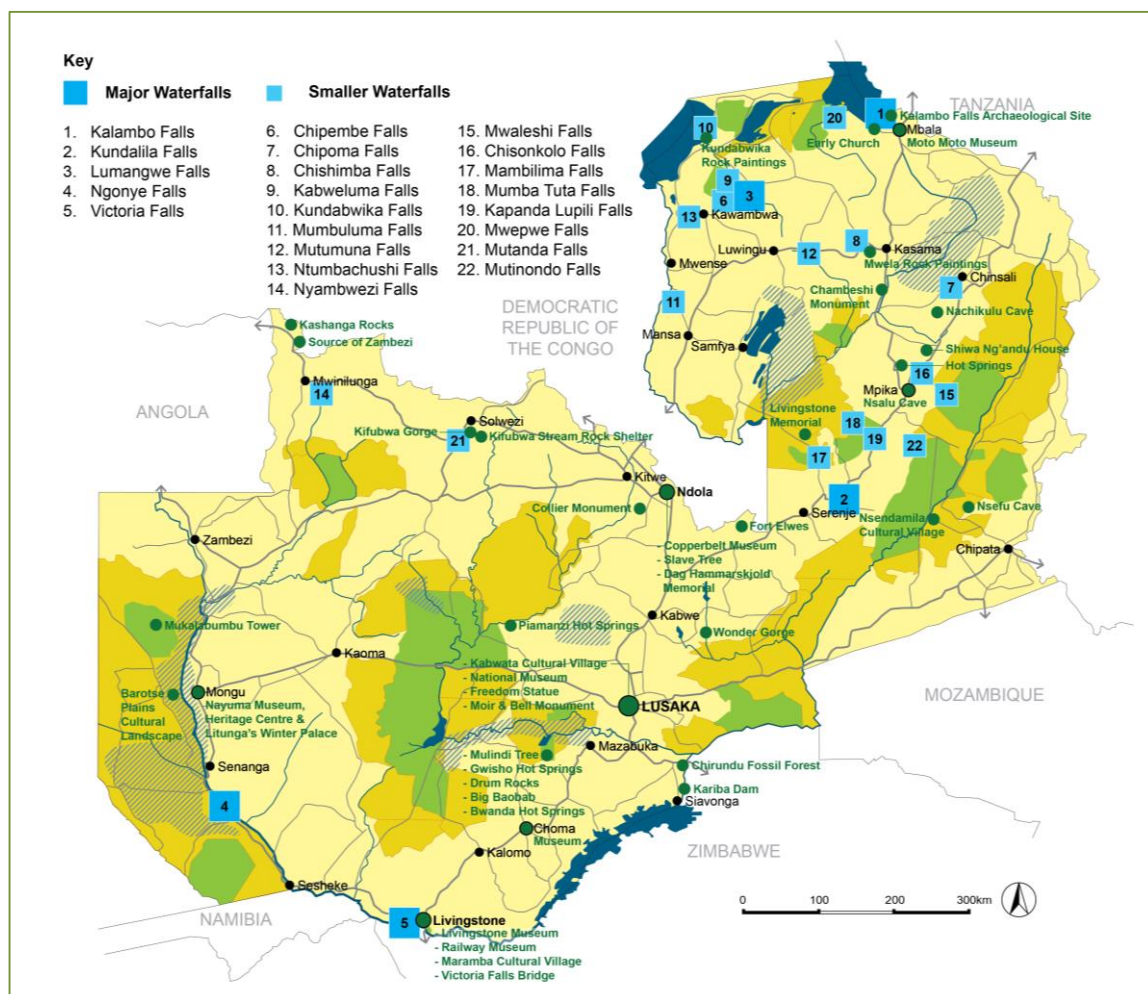
Zambia's impressive network of natural and man-made lakes also offers good tourism opportunities, especially for domestic tourism, as do the many rivers and flood plains providing opportunities for bird watching. Forests are also important for tourism and enhancement and protection of many of Zambia's heritage and tourism sites like waterfalls, river systems and archaeological finds.

### 2.2.2 Heritage and Cultural resources

In addition to Mosi-oa-Tunya (Victoria Falls), a UNESCO World Heritage Site, Zambia's heritage tourism attractions include many small unique natural sites, 13 of which are declared as National Monuments, including several waterfalls and lakes. The many other waterfalls along Zambia's network of rivers are all potential tourist attractions, albeit as elements of a package of experiences rather than as singular attractions like Victoria Falls. Other sites include rock paintings, memorials and historic buildings.

Figure 2.5 indicates the locations of the most important waterfalls and cultural heritage sites with tourism potential.

**Figure 2.5: Waterfalls and other cultural heritage sites**



Cultural heritage also includes aesthetic products such as traditional and customary practices in the form of festivals and ceremonies, and creative arts such as carvings, pottery, jewellery, products from weaving and other traditional attire as well as products of performing arts such as drama, songs, dances and

interpersonal and community relationships which brings benefit to both the host and the guest.

The MoTA has engaged in various cultural village developments in Lusaka, Livingstone, Kazungula, Solwezi and Ndola, however, these have generally been unsuccessful. These government investments are seemingly not operated in a commercial and business-like manner and cast a somewhat negative image over the cultural tourism concept.

### **2.2.3 Other tourism resources**

The main urban areas and towns in Zambia currently hold little leisure tourism interest and are usually geared towards the business and conference market. However, comprehensive improvements in the key tourism areas of Lusaka and Livingstone are required. These include townscape and landscape improvements, development of new tourism facilities, traffic and pedestrian circulation and downtown management.

Other tourism products of note include government operated and private museums, wildlife attractions, and some natural beaches.

### **2.2.4 Planning, management and protection**

Planning and implementation of local area management and development plans is critical for sustainable tourism development. To date, implementation of the many plans and programmes such as GMPs and IDPs has lagged and the following constraints, among others, are evident:

- Finalisation of plans and stakeholder disagreements.
- Integration of GMPs for NPs and surrounding GMAs.
- Lack of tourism expertise in DNPW and NHCC.
- Lack of monitoring of plans and programmes.
- Limited coordination and prioritisation with regard to road provision and maintenance, investment in visitor facilities and amenities in parks and heritage sites.
- Poaching, overfishing and illegal fishing, defacing and vandalising of heritage sites in parks and protected areas.
- Lack of incentives for private operators to partner DNPW in anti-poaching, road maintenance and management.
- Lack of support for community scout initiatives through regular payment and training.
- Lack of community ownership and responsibility for the management and protection of resources by broadening community participation and decision making regarding use of resources and application of revenues.
- Lack of defined lines of responsibility and communication and planning coordination among government ministries

However, some plans and programmes are moving ahead. These are usually supported by NGOs such as The Frankfurt Zoological Society, African Parks, Kasanka Trust, Peace Parks Foundation and others. This partnership approach between the public and private sector to planning, developing and managing projects is to be encouraged.

While better planning, management and protection such as law enforcement and anti-poaching initiatives are important elements of conserving wildlife and natural resources, achieving greater and more equitable community ownership of resources is a key success factor for sustainable tourism development and conservation in Zambia.

## 2.2.5 Key success factors for the development of tourism resources and attractions

- *Differentiating and prioritising tourism developments in parks and protected areas towards improved tourism performance* by positioning in terms of tourism value vs. volume, priority and phasing for tourism development, unique selling proposition, and fees and charges.
- *Improving planning quality and implementation of natural and cultural resources* by implementing plans that have actually been developed.
- *Prioritising and phasing infrastructure improvements and tourism developments at culture and nature tourism sites* based on their market viability and their contribution to tourism.
- *Increasing financial resources* for implementing plans and for ensuring effective law enforcement, management, maintenance, and expansion of national parks according to a priority plan.
- *Further supporting and incentivising public-private-community partnerships and cooperation* to address potential impacts on tourism resources.
- *Considering alternative models for restocking national parks.*
- *Advancing community ownership of natural and cultural resources* to enable local communities to become true partners in management and protection.
- *Supporting and enhancing living culture and arts* by packaging cultural resources to suit the tourism market.

## 2.3 Facilities and services

Zambia is an emerging destination and although the Victoria Falls has long attracted international tourist visitors, safari tourism and business tourism has also developed with the current distribution of supporting tourism facilities and services.

### 2.3.1 Nature and extent of facilities and services

Almost two thirds of Zambia's accommodation room supply is found in only two Provinces - Lusaka (39%) and Southern (26%), while the Copperbelt (12%) is the location for the third largest supply of rooms. Lusaka Province includes the capital city but also the Lower Zambezi Valley while Southern Province includes Livingstone and the Copperbelt covers Ndola, Kitwe and Chingola. According to the MoTA Tourism Statistical Digest 2015, the annual average room occupancy rate for Zambia was 69.8%

Ownership is largely characterised by individual, owner operated single establishments although there are a few businesses that operate two or three hotels/lodges. The safari lodge sector supply is similarly characterised by individual/family ownership mostly operating a single property although once again there are a few businesses with two or three lodges. Lodge ownership is largely in the hands of Zambian nationals.

Accommodation supply in key leisure tourism areas like Livingstone, Lower Zambezi, and South Luangwa is skewed in favour of either the budget traveller (below US\$ 70 per night) or the higher end traveller (above US\$170 per night). Only approximately 25% of accommodation capacity in these areas is medium cost, i.e. (US\$70 – US\$170).

Traditionally, the large hotels have been the reliable restaurant option for visitors but the opening of several large shopping malls in the last ten years, particularly in Lusaka, has widened both retail and stand-alone restaurant choice. Safari lodges offer their own bespoke, high quality cooking, as an integral part of the visitor experience.

Nightlife in Lusaka focuses on bars and restaurants located in the shopping malls and around the city with some offering local music. Three of the malls also include modern multiplex cinemas. In

Livingstone, live music several nights a week, is a feature in a number of bars and restaurants in town and also at some of the larger hotels. Nightlife in the Copperbelt is primarily directed at the local resident market.

Lusaka has four main markets, all centrally located. Livingstone also has local markets. Both cities also have specialised craft/curio markets notably the Kabwata Cultural Village in Lusaka and the Mukuni Park and Victoria Falls entrance markets in Livingstone. Ndola has its own crafts and curios market. Shopping is increasingly associated with shopping malls that are anchored by major supermarket chains.

International car hire companies are represented in Zambia at airport and downtown locations, although Voyagers Rentals, the local franchisee for Europcar, has the greater presence nationally. Other local car hire companies are also available, including some specialising in renting 4x4 vehicles and vehicles fully equipped for camping.

MoTA operates limited tourism information offices at both Lusaka and Livingstone airports and has an additional information service at their downtown information centre. A new ZTA information office was opened in June 2017 at Eastpark Mall in Lusaka. A monthly publication called The Lowdown available online and in hard copy, has a useful listings section describing what's on in Lusaka while a glossy quarterly magazine called Travel and Leisure Zambia contains feature articles on locations and aspects of Zambia's tourism product.

The standard safari lodge accommodation product is usually inclusive of one or two game drives and perhaps a water based trip but additional activities will come at an additional cost either using in-house capacity or purchasing excursions and tours from local specialist companies. In Livingstone the accommodation package may include a visit to the Victoria Falls. Moving beyond the traditional Victoria Falls and major National Park locations, visitors will find limited tourism information and organisation support. Advance planning will be required for specialist birding, wildlife, marine, fishing, heritage and community related tours and visits.

Adventure/extreme sport are mostly associated with Victoria Falls/Livingstone which has a long established tourism infrastructure of tour operators and travel agents and activity providers able to offer a wide range of excursions and activities. Sport fishing is available on the Zambezi both upstream and downstream of Victoria Falls, on Lake Kariba and Lake Tanganyika. The Zambia Golf Union lists 22 golf courses in the country, half of which have 9 holes and half with 18 holes. A major new golf resort, hotel and conference centre is being planned for a site between Lusaka and the international airport.

There are 19 commercial banks operating in Zambia and most of them operate a network of ATM's. The use of cash to settle transactions is still a favoured option with many smaller businesses including lodges and guesthouses, particularly in remoter areas, where mobile phone network coverage is poor.

### **2.3.2 Product and service quality**

The accommodation classification used by MoTA is inadequate for accurately distinguishing between accommodation types. Additionally, there is no breakdown of accommodation data by grade/quality i.e. a 1-5 star categorisation approach or similar, which allows a greater understanding of the qualitative mix, performance and distribution of accommodation around the country.

A system of accommodation classification and grading was developed in 2008/9 with the intention that this be implemented by 2012. This is currently not in operation. This leads to market uncertainty in the range and quality of facilities, services and service delivery on offer throughout the sector, particularly as there are only a few internationally recognised hotel brands with recognised standards and quality operating in the country.

### 2.3.3 Key success factors for expansion of facilities and services

- *Expanding the range of tourism accommodation options* to expand room capacity in the three to four-star accommodation range.
- *Improving quality of facilities and service levels* especially for new entrants to tourism and are not part of accommodation chains.
- *Improving and promoting MICE facilities* for the domestic, regional and international conference and convention markets.
- *Improving visitor information services* beyond the packaged travel market to include tourist information online and on the ground.
- *Strengthening local ground handling and tour operating capacity* by addressing barriers to entry such as bureaucracy involved in obtaining operating licences, high costs and import duties of vehicles, skills gaps, market access barriers, etc.
- *Tailoring medical and emergency services for tourism including* Broadening medical services and staff in national parks and other remote areas.
- *Implementing a relevant and practical grading and classification system, including* ensuring necessary tools, financial viability and sustainability, and logistics and human resources for implementation.

## 2.4 Business and investment conditions

The situation analysis indicates that Zambia is at a disadvantage in various areas of business competitiveness that need to be addressed as a matter of urgency.

### 2.4.1 Ease of doing business

Zambia ranks 98<sup>th</sup> out of 190 economies in the World Bank Doing Business 2017 report, which sheds light on how easy or difficult it is for a local entrepreneur to open and run a small to medium sized business. It is ranked well ahead of Zimbabwe, Tanzania and Namibia, but behind South Africa, Botswana and Rwanda. A second perspective is provided in the report's Distance to Frontier where Zambia scores well ahead of the Regional Sub-Saharan average. However, time consuming and costly border formalities, fragmentation of business licences and procedural delays in registering property and securing electricity supplies for new ventures is equally challenging. The knock-on effect of these issues contributes to higher costs and makes Zambia less competitive and attractive for tourism investment and business expansion.

High lending interest rates is another factor which is a challenge across the wider business community, particularly the smaller business community which comprises much of the tourism sector (larger and more established businesses are often well-placed to borrow outside the country at more competitive rates).

### 2.4.2 Taxation

Zambia's VAT rate is slightly higher than most of its neighbours, significantly higher than the current rate in Botswana but lower than the rate used in Tanzania. The Zambia Tourism Levy (designed to support several aspects of tourism development) is slightly below average for those countries adopting a percentage rate approach but more expensive than those using a one-off or daily monetary figure. Zambia also extends the coverage of the Levy to include conference, exhibition and banqueting event expenditure but the clearest difference between Zambia and its competitor neighbours is its unique introduction of a 10% Service Charge applied to all accommodation, food and beverage expenditure which has the direct effect of making Zambia a comparatively more expensive destination to visit.

### 2.4.3 Licensing requirements

The Tourism and Hospitality Act of 2015 determines that all tourism enterprises should be licensed to operate by ZTA. The licensing system, while well-established, is nonetheless a complex, costly, time-consuming, burdensome, inefficient and uncertain process. Although the One Stop Shop in Lusaka and Livingstone attempts to reduce red tape and save time.

### 2.4.4 Visa regime

Zambia's single entry tourist and business visa charges bear comparison with Botswana's visa free approach covering its principal and growing visitor markets, while Zambia's approach is the opposite, requiring the purchase of a visa from all its principal and prospective holiday tourist markets. However, The Zambian e-visa application system is simple or the visa can be easily purchased at the port of entry.

### 2.4.5 Vehicle entry charges

Every vehicle, commercial, public transport or private, crossing a frontier is generally subject to certain cross-border checks and tariffs of varying degrees of specificity and cost. Zambia has the highest individual entry fee for a vehicle. The high costs of vehicle entry charges and fuel costs are part of a wider, challenging cost environment for the independently mobile tourist.

### 2.4.6 Customs and excise duties

The Zambian accommodation sector in general is importing the greater part of its food and beverage requirements, mostly from South Africa due to the poor choice and quality supply from local markets to meet client expectations. Zambia places 25% customs duties on most imported food and beverages and then adds 60% excise duty and VAT on all drinks and non-food items. Importation of many other articles and items required by the tourism sector to fit out new and refurbish existing accommodation enterprises and businesses still attracts customs duties of a similar magnitude.

Zambia compares poorly against its competitors on several indicators and has an impact partly in terms of individual costs to the visitor and sector competitiveness, but also in terms of wider visitor and investor perceptions of the destination and the approach taken to the sector by Government.

### 2.4.7 Investment incentives

Over the last five years, investment in the tourism industry and pace of development has been strong with a number of new hotels developed and a mix of small, new and refurbished independently owned safari lodges and urban guesthouses, as well as a number of local hotels focussing on the domestic market. Fiscal and non-fiscal incentives are available with tourism identified as a Priority Sector. They are broadly in line with incentives of neighbouring competitors. However, amore targeted approach, which considers perhaps geographic location, tourism product and the equipment requirements of an investment, could extend the existing framework to more practical effect.

### 2.4.8 Key success factors for improving business and investment conditions

- *Streamlining wider business procedures and red tape* to increase Zambia's competitiveness and attractive tourism investment and business expansion.
- *Reducing costs of borrowing from the banking sector*, thus contributing to increased investment in the tourism sector.
- *Streamlining legal requirements and ZTA regulations facing the industry* to improve business conditions.
- *Devising an investment friendly taxation regime for tourism* that addresses VAT, service charge, visa charges, vehicle entry charges, and customs and excise duties.
- *Introducing suitable investment incentives for the sector.*

## 2.5 Infrastructure and access

For the future development of tourism, it will be vital to achieve a level of accessibility by air, road and rail, internationally and regionally as well as locally. It will also be important for government to work closely with the tourism sector and the utility service authorities to agree a programme for infrastructure provision for all priority development areas.

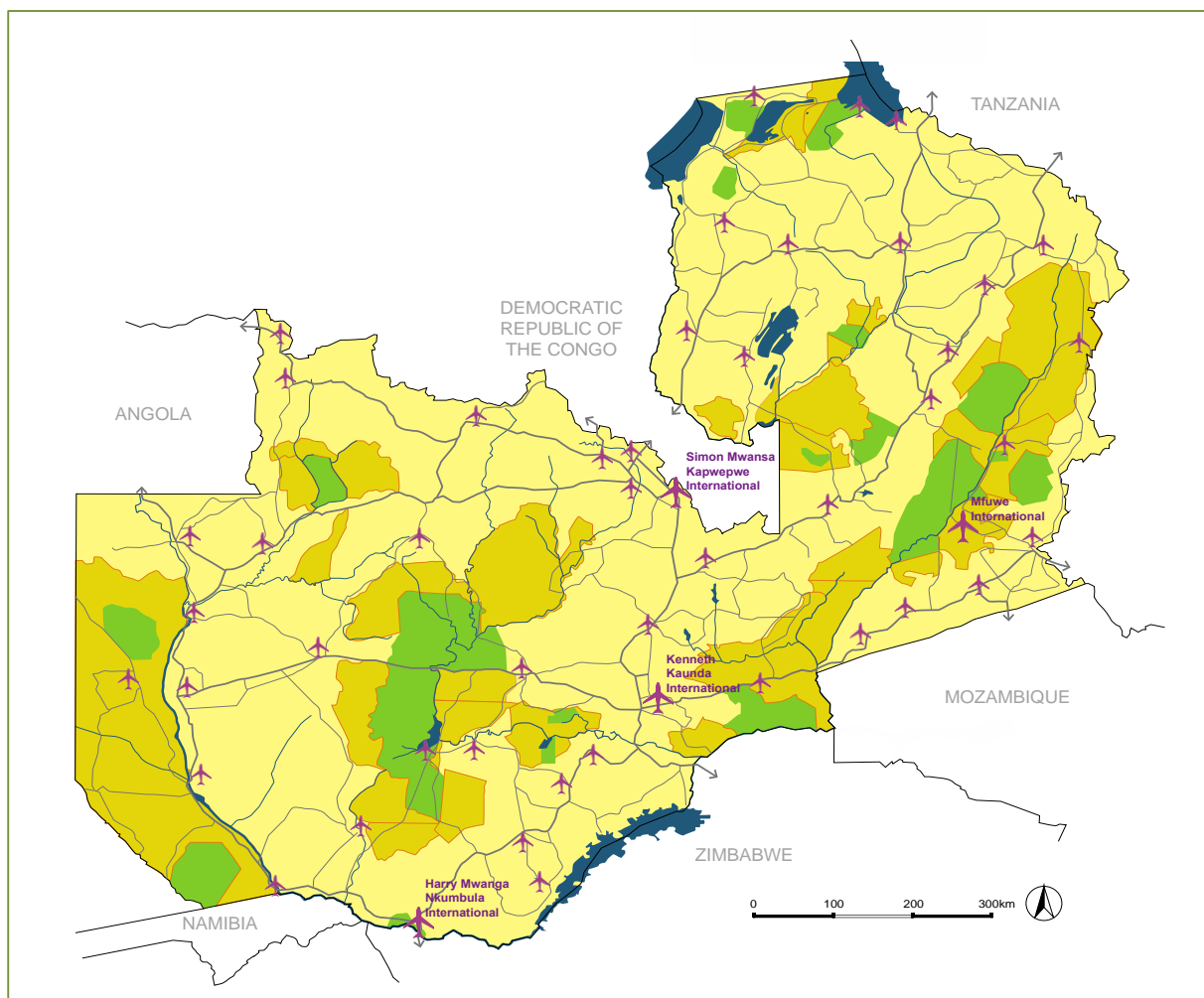
### 2.5.1 Air, road and rail

There are four international airports serving the country:

- Kenneth Kaunda International Airport (Lusaka) – currently being extended.
- Simon Mwansa Kapwepwe International Airport (Ndola) – to have a new airport and services.
- Harry Mwaanga Nkumbula International Airport terminal (Livingstone) – recently upgraded.
- Mfuwe International Airport (South Luangwa) – to be upgraded.

Several regional and local airports and runways are located throughout the country and range from all-weather surface to graded airstrips. Many of the airstrips are located within the National Parks and GMAs and are only accessible during the dry months of the year. Some local airports and airstrips are receiving small upgrades that will help increase tourist numbers. Zambia's airports and airstrip are presented in Figure 2.6 below.

**Figure 2.6: Location of Zambia's Airports**



Zambia is well served on most international routes but not by any direct, non-stop flights from any of its

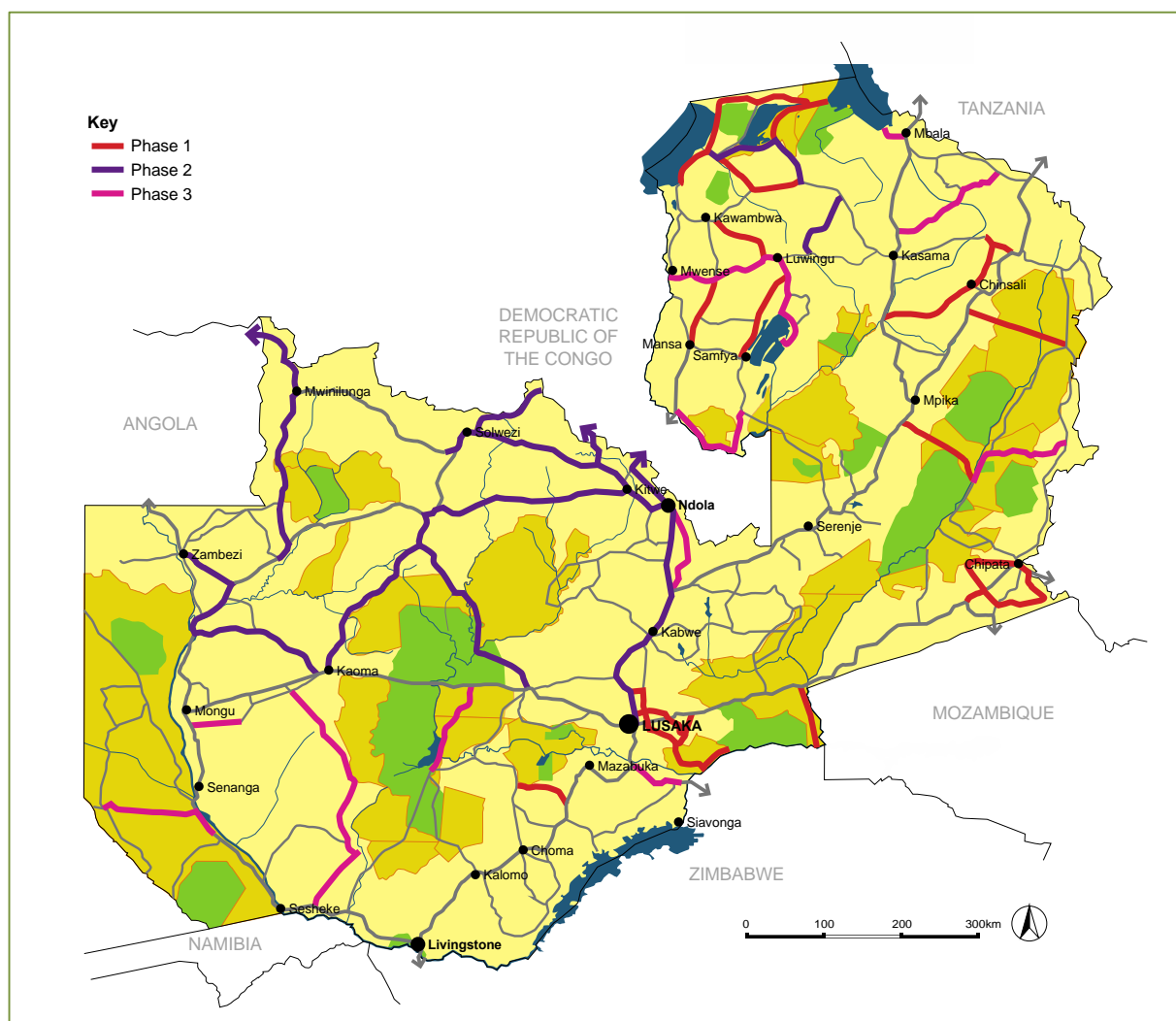


markets, namely UK and Europe. This adds to the travel time.

Domestically the country is serviced by a single scheduled airline, Proflight as well as a number of charter operations. Scheduled and chartered domestic air travel is expensive and limited compared to other destinations in the region. The current high cost of both scheduled and a charter flight is a major inhibitor of tourism growth and should be addressed as a matter of urgency.

The country is well served by its road network; however, it is hampered by the poor state of many roads giving access to tourism sites and by the lack of maintenance of roads and tracks within the protected areas. A Road Maintenance Strategy (2015-2024) has been produced to set a clear pathway for the provision of road maintenance services. The planned road upgrading is shown in Figure 2.7. However, the improvement strategy largely aims to facilitate industrial and agricultural development objectives and tourism is mostly a secondary rather than a major influencer of the strategy.

**Figure 2.7: Priority roads for maintenance and improvement**



A focused tourism road access and distribution plan is required to achieve the desired growth levels. Such priorities need to connect roads from main arterials to key tourism sites and much improved internal roads within protected areas in order to accommodate higher tourism volumes.

There are two railway networks: Railway Systems of Zambia (RSZ) and Tanzania Zambia Railway Authority (TAZARA). Current RSZ plans include:

- Upgrading of the Livingstone-Lusaka line to help speed up the service.
- Refurbishment of coaches.
- Promotion of PPPs to develop land on some of the large RSZ sites adjacent to the Livingstone-Copperbelt railway line.

TAZARA operates a 2 day a week service from Kapiri Mposhi to Tanzania; a service that is popular with backpackers. For the more discerning tourist, South African Rovos Rail operates a luxury train 5 times a year from South Africa to Tanzania, passing through Zambia along the TAZARA rail line.

### 2.5.2 Power, water and waste

The main supplier of power in Zambia is the Zambia Electricity Supply Corporation Limited (ZESCO). Supply within central Lusaka and main towns is generally good but most of the population in semi-rural and rural areas is located far away from the national grid and extension of the network to these areas is expensive and may not be viable. The technologies being promoted are therefore min-hydro, biomass, solar and wind energy. Mini-Hydro power potential is abundant in the country but may have an impact on water flow at some of the heritage waterfall sites, thus having implications for future tourism development.

In spite of ample water reserves, public water supply is poor. Around half the urban population have access to water connections in their home. The other half rely, as do the rural population, on water kiosks and standpipes drawn from bore holes. Lodges and safari camps in many cases rely on their own boreholes.

The city area of Lusaka benefits from a central sewage system as do the major urban towns. However, many of the town systems are clogged and in need of repair. Outside the urban areas, pit latrines and septic tanks are used, but often, these are not regularly emptied and therefore contaminate the boreholes used for collection of water. Septic tanks are used for lodges and safari camps and are generally maintained in good order.

Solid waste disposal is almost unregulated. In rural areas litter is highly localised, however, in the city, evidence of litter along the street and next to over full waste bins is all too evident. In the protected areas, some of the lodges are leading the way in environmental management thinking about materials in terms of reduce, reuse, and recycle. It goes without saying that a clean country promotes good health, attracts tourists and is environmentally friendly.

### 2.5.3 Key success factors for adequate tourism infrastructure provision

- *Liberalising aviation and implementing a proactive domestic air access strategy*, thereby encouraging international airlines to fly into and expand their routes to Zambia, and to reduce airport taxes, fees and inspections for domestic air travel.
- *Implementing a tourism-specific road improvement plan as a dedicated mechanism for unlocking the tourism growth strategy.*
- *Assessing and mitigating tourism impacts of infrastructure developments*, including hydro-electric power plants, dam developments, road construction etc.
- *Promoting sustainable and responsible tourism* throughout the country when planning and implementing tourism related infrastructure.

## 2.6 Marketing and branding

As indicated in section 2.1 international travel remains buoyant despite global economic crises and political turmoil in certain regions and this presents Zambia with excellent tourism growth opportunities. However, tourism is highly competitive and increasing Zambia's market share will require excellent destination marketing. The following situation pertains.

### 2.6.1 Brand and image



Zambia's brand identity represents the sun and Victoria Falls Waterfall, combined with the brand slogan "Let's Explore". The following conclusions are drawn based on tourism operator views and an objective evaluation of the brand:

Slogan: The "Let's Explore" promise of exploration and discovery could be applied to most destinations in Africa and "Explore" is a general travel term that may not excite traveller aspirations for visiting Zambia. Its emotional "stickiness" is limited compared to the emotional brand promises of Kenya ("magic"), Tanzania ("soul of Africa") and South Africa ("Innovation and renewal").

Visual identity (logo): The logo is colourful, upbeat and informal and it includes the Victoria Falls as key brand icon. On the other hand, it lacks boldness and tends to fade among its peers and the informal design masks the high quality of products and experiences and does not support the African-explorer brand promise.

Regarding Zambia's image, the country offers good personal safety and security considerations that are top of mind with international travellers, including relative peace and stability, safe travel environment, good visitor health conditions and low levels of police and civil harassment, compared to most other developing destinations.

### 2.6.2 Market and product segments

To date Zambian tourism has relied on a limited number of international market segments for tourism growth, in particular exclusive safari travellers and packaged international travellers on short extension trips to Victoria Falls. Domestic tourism has struggled to take off as a result of slow domestic economic growth and expatriate.

Asked to rate in priority order the four most promising market growth segments, the Zambian travel trade<sup>12</sup> rated the international mid-value travel segment as offering the highest growth potential and also rated exclusive high-end safaris and special interest niches as particularly promising. When planning to expand larger market segments such as the mid-value leisure and the MICE markets, adequate capacity in accommodation, air/road access and visitor amenities are key challenges for attracting and dealing with larger volumes of visitors.

### 2.6.3 Marketing operations

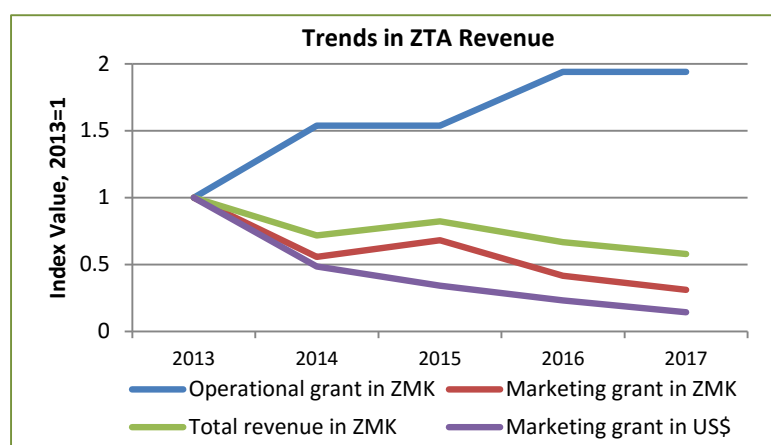
Destination marketing operations should be seen within the context of a various factors, namely:

- Available marketing budget
- Marketing execution and activities
- The marketing strategy going forward

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<sup>12</sup> Results of online survey among Zambian tourism operators

**Figure 2.8: Trends in ZTA funding**



Unfortunately, the available budget for promoting Zambia has severely declined over the past few years, as can be seen from Figure 2.8. The figure presents index values of ZTA funding over the past five years, with a base value of one (1) for 2013, the first measurement year. As can be seen from the figure the ZTA's total revenue (grant allocations) has almost halved since 2013, from around ZMK26 million in 2013 to less than ZMK15 million in 2017. The

minimal marketing budget has had a severely negative effect on the ZTA's ability to effectively execute its mandate, as is borne out by the fact that the ratio of marketing expenditure to staff costs has declined from 24:1 in 2014 to almost 1:1 in 2017.

ZTA's marketing focus has changed considerably over the past three years. The following aspects are particularly noteworthy:

- *Multi-market approach 2015:* In 2015 large variety of source markets were targeted, mainly through exhibiting at no fewer than 18 tourism trade fairs and participating in pre-arranged roadshows organised by private agencies on behalf of a number of Southern African destinations.
- *Focused and inward directed 2016:* In 2016 ZTA consolidated its target markets and focused on domestic tourism and core international source markets.
- *Indirect and across the board 2017:* In 2017 ZTA's minimal marketing budget has resulted in a highly focused strategy, having to rely on indirect exposure to core markets only.

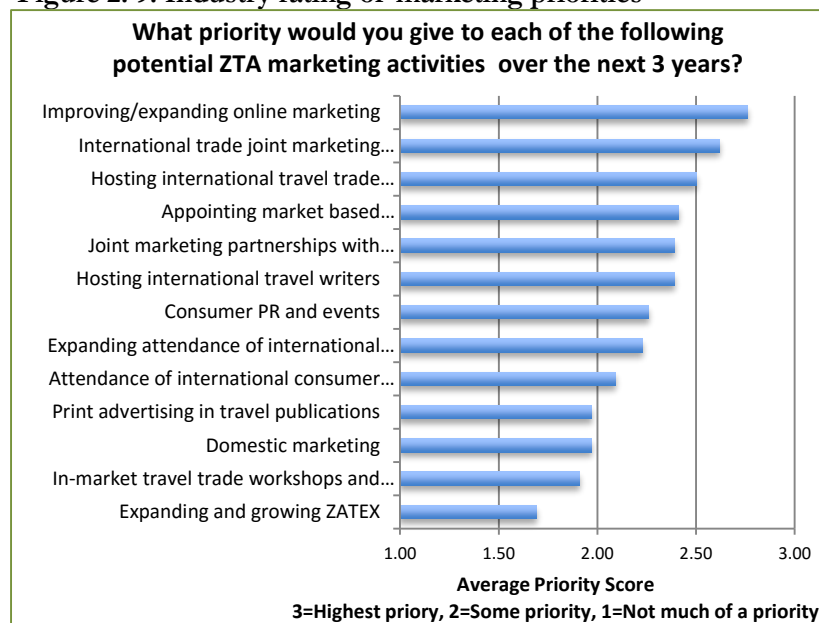
More than 60% of international marketing expenditure in 2016 was allocated to exhibitions, with ZATEX comprising almost 20% of expenditure and a further 43% of expenditure allocated to exhibiting at ITB, the New York Times show and travel shows in South Africa (Indaba, WTM Africa, Meetings Africa). Participation in international trade road shows comprised a further 17% of expenditure while only 1% of marketing funds was spent on e-marketing. Small amounts were allocated to a few print advertisements and advertorials, hosting of travel media and payment towards a PR agency in South Africa, mainly for support at trade shows. With the reduction in the marketing budget in 2017, expenditure on ZATEX comprised no less than 30% of overall expenditure and exhibiting at WTM Africa and Indaba required almost a further 50% of the available budget. In a positive move ZTA increased proportional expenditure on digital marketing to a substantial 10% of overall expenditure.

Domestic promotion and communication has been somewhat of a catchall portfolio for a wide range of activities including production of print and electronic marketing collateral, internal branding, management of MICE tourism, promotion of domestic travel, media relations and creating awareness of the value and responsibilities associated with tourism growth in Zambia. As a result, the limited resources have been spread thinly across a range of activities in 2016, when domestic promotion received almost equal financial resources compared to international promotion. Sponsorship of the LICAF festival required a substantial financial allocation. With the major decline in the domestic promotion budget in 2017 the range of activities was substantially reduced, mainly to focus on promotion through radio talks, opening up of a new information office in Lusaka and launching a tourism awareness programme in schools.

ZTA has made substantial progress in social media marketing, especially through Facebook, with the page having secured more than 32,000 likes. While ZTA commenced development of a destination website ([www.zambia.travel](http://www.zambia.travel)) in 2016, the site remains under construction and needs urgent improvement, as both functionality and content is insufficient and not at international standards.

Research conducted among private operators indicated that the private tourism industry has limited faith in Zambia's destination marketing. Few respondents rated any of the marketing activities as "largely effective". Only international promotion, attendance of international travel fairs and online marketing received a slightly better effectiveness rating<sup>13</sup>.

**Figure 2. 9: Industry rating of marketing priorities**



Differences in marketing vision between private sector and ZTA is clear from Figure 2.9. Private operators rated as priorities online marketing, joint marketing agreements with international and local travel trade and airlines, hosting international travel agents and media and appointing market based representatives in key markets. Various ZTA's key marketing investments such as ZATEX, attendance of roadshows and domestic marketing scored low on the priority list, while expansion of trade and consumer fairs was rated as medium priority.

The ZTA does not have a formally adopted marketing strategy, however the organisation has developed a basic guiding document as "strategic thrusts" for the next five years, stating<sup>14</sup>

- Overarching strategic marketing objectives: to increase international tourist arrivals from the current 946,696 to 1.5 million by 2021 and to attain 25% increase in domestic arrivals at heritage sights and national parks by 2021.
- ZTA envisages execution through comprehensive market research, domestic promotions, operationalizing e-marketing, increased visitor information provision, working with and training the international travel trade to improve product packaging and TV advertising on main cable channels internationally.
- To achieve the objectives organisation targets an annual marketing budget of USD 7 million per annum (10 times the current marketing budget) and having more that 60% of staff positions filled.

### 2.6.4 Key success factors for improving marketing and branding

- *Agree a differentiated market positioning with broader appeal in the industry and carry through such differentiation in product development and promotion.*
- *Progressing the brand, including refreshing and possibly adjusting the slogan and brand design to strengthen Zambia's tourism proposition and potential brand impact.*
- *Adopting and implementing a consistent, focused and segmented marketing strategy to unlock new market segments and less visited tourism areas.*
- *Significantly increasing marketing investment and capacity for spearheading critical marketing factors such as*

<sup>13</sup> Note: While the survey results represent industry perceptions at a time when ZTA's marketing resources have been severely reduced and perceptions are no doubt heavily influenced by ZTA's chronic funding shortages, it is nevertheless a cause for concern and points to a lack of a collective marketing vision and confidence between ZTA and private sector.

<sup>14</sup> ZTA (2017): Strategic Thrusts 2017-2021, unpublished document

brand building, travel trade promotions, media exposure, online marketing and market research.

- *Strengthening Zambia's international market presence* to improve marketing effectiveness and efficiency.
- *Building a strong public-private marketing partnership and jointly plan and execute the destination marketing strategy with private sector partners.*
- *Improving online marketing approach and tools*, building on progress made and based on an integrated online marketing plan.
- *Devising a realistic, longer-term growth strategy for the domestic market* to avoid unrealistic growth expectations and adopt a longer term, consistent approach to unlock the potential of this market.
- *Strengthening MICE marketing* through a focused initiative to present and promote Zambia's status as a quality conferencing destination.
- *Improving market intelligence, thus basing strategic and tactical marketing decisions on any significant market analysis or segmentation.* Dedicated capacity is required in this regard.

## 2.7 Human resources development

One of Zambia's tourism advantages is the inherent hospitality, openness and friendliness of Zambians. These characteristics will be further enhanced and commercially strengthened by developing worker hospitality and tourism skills.

### 2.7.1 Institutions and courses

In Zambia there are few recognised and quality-assured institutions that specialise in tourism skills training.

The longest established institution that provides training in the tourism and hospitality industry in Zambia, and still the only specialised public training institute for the sector is the Zambia Institute for Tourism and Hospitality Studies (ZITHS). It offers a variety of courses on full-time, part-time or distance learning bases, including:

- Four-year BSc degrees in Hospitality Management, Travel and Tourism Management.
- Two to three-year Diploma courses in Hospitality and Tourism Management and related Food Production and Front Office specialities.
- Six-month courses in International Air Transport Association (IATA) prescribed, air transport related courses.
- Two-year Advanced Certificate courses and one-year Certificate courses are also available.

The Institute also conducts mobile training in various tourism and hospitality courses/programmes that are tailored according to the needs of individual businesses and these also include Safari Tour Guiding, Tour Officer training and Travel Agency Techniques training. ZITHS has ambitious plans to build a new campus at Livingstone to include several hotels, a convention centre and residential development, but as yet, have no funding in place.

The Livingstone International University of Tourism Excellence and Business Management (LIUTEBM) is privately owned, based in Lusaka (despite its name) and offers various courses in tourism, hospitality and wildlife management, (including a three-year degree course, diploma course, 18-month Masters, and MBA) as well as degree courses in Business and Economics, Law, Medicine, the Humanities and Social Sciences and Environmental Science and Management. The courses are available as full-time, part-time and distance learning.

Livingstone Institute of Business and Engineering Studies (LIBES) offers a two-year Diploma courses in Hospitality Management, Front Office Management and Food Production as well as a one-year course in Tour Guiding using TEVETA approved curricula.

There are several smaller training institutes/facilities operating in the tourism and hospitality sector around the country that have the capacity to produce over 200 students a year in all tourism and hotel subject areas which, when added to the roughly 500 students at ZITHS, suggests that a maximum capacity of 700 students per year could become qualified. A further source of trained personnel created each year, and not covered by the figures above are those trained in-house within the hotel and safari lodge sector.

### 2.7.2 Quality assurance and accreditation system

The Zambia Qualifications Authority (ZAQA) is the national regulatory authority for all qualifications offered in the country. According to the Technical Education, Vocational and Entrepreneurship Training Authority (TEVETA) there are 293 registered institutions in Zambia accredited to offer TEVETA approved curricula in a range of subject areas including hospitality and tourism with two thirds of them being located in either Lusaka province or the Copperbelt. ZITHS and LIBES are included in this number as is Conservation Lower Zambezi (CLZ) who also run safari guide training courses.

Currently however, there is very limited engagement between private employers and training bodies and institutions. As a result, training institutions do not necessarily offer the type and quality of training required by the industry and private operators do not always value the type and quality of manpower produced by such institutions. Further, specialised institutions like ZITHS and LIBES are poorly equipped and there is a shortage of qualified trainers at such institutions. Facilities are in urgent need of refurbishment and staff members require improvement and retraining. The hospitality and travel curricula offered at such institutions are not kept up to date and in line with the latest trends and technologies in these fields. In short, there is a need to develop tourism training “centres of excellence” in line with the MoTA’s policy directives.

### 2.7.3 Key success factors for ensuring trained and qualified human resources

*Increasing the extent of skills training supply* to provide for the expansion of the tourism industry.

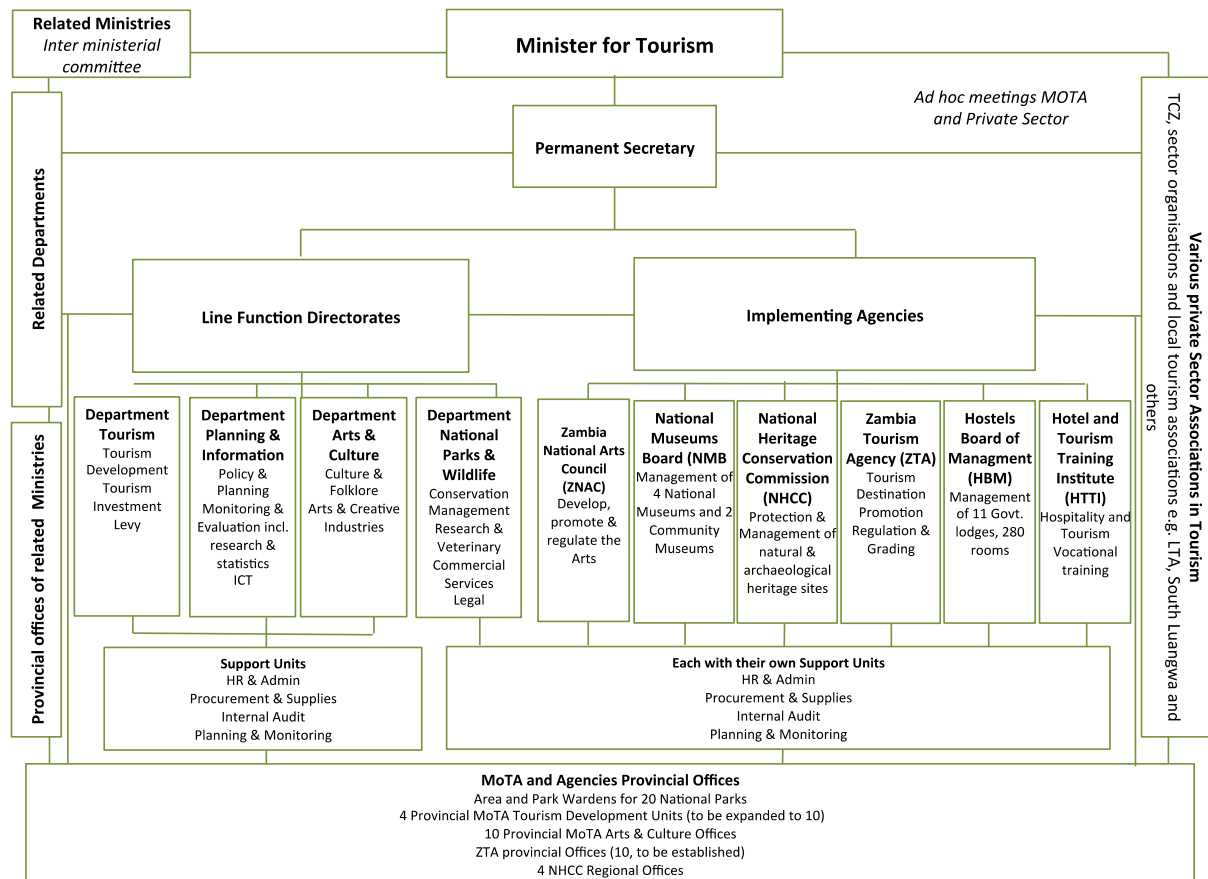
- *Increasing the extent of skills training supply, including expansion of tourism related training facilities and equipping vocational training institutions to adopt tourism as training line.*
- *Ensuring that tourism training supply matches industry demand* by encouraging training institutions to offer the type and quality of training required by the industry and private operators.
- *Improving the quality of tourism skills training facilities, staff and curricula, i.e. developing tourism training “centres of excellence” in line with the MoTA’s policy directives.*
- *Encourage entry of skilled workers from elsewhere* in certain specialised areas of tourism and hospitality industry.
- *Expanding tourism education and awareness at schools level, as vocational subject but also introducing learners at a young age to the value and concept of tourism as early as possible in their school career.*

## 2.8 Organisation and funding

Tourism development in Zambia is managed and controlled by a wide range of government bodies, as presented in Figure 2.10 below, an overview organogram of MoTA, its agencies, related Ministries and private partners below:

### 2.8.1 Structure and functions

Figure 2.10: Conceptual organogram of MoTA, its agencies and other partners



In addition to the Office of the Minister, the Ministry is divided into three broad institutional categories, namely:

- Four-line function departments.
- Six statutory implementing agencies.
- Provincial/regional level offices of line functions and agencies, which range in numbers from four regional offices for some functions to ten provincial offices for others.

Four organs of the Ministry have tourism promotion and development as their core mandates, while various components of the Ministry have tourism as an important function linked to their core mandates. These can be summarised as follows:



**Table 2.1: Mandate by Ministry Department and Statutory Body**

<b>Tourism development and promotion as core mandate</b>	
Directorate of Tourism	<ul style="list-style-type: none"> <li>– Tourism policy formulation, legislation and planning</li> <li>– Promoting investment in tourism, facilitating and implementing international treaties and protocols, enforcing code of tourism ethics, facilitating tourism training and promoting indigenous micro and small enterprises, conducting research and product diversification in tourism.</li> <li>– Administering the Tourism Development Fund and Levy.</li> <li>– Facilitating the decentralization of tourism to local authorities.</li> </ul>
Zambia Tourism Agency (ZTA, previously Zambia Tourism Board)	<ul style="list-style-type: none"> <li>– Promoting destination Zambia internationally and domestically and stimulating sustainable tourism development.</li> <li>– Administering and implementing tourism licensing and quality assurance.</li> </ul>
Hotel and Tourism Training Institute (HTTI)	Conducting tourism and hospitality vocational skills training.
Hostels Board of Management (HBM)	Operating 11 government-owned accommodation establishments throughout Zambia, representing about 280 rooms.
<b>Tourism development and promotion as a key function linked to core mandate</b>	
Department of National Parks and Wildlife (DNPW) National Heritage Conservation Commission (NHCC)	Conserving and protecting Zambia’s National Parks, Game management Areas and the wildlife and resources within., including management of consumptive and non-consumptive tourism in parks and GMAs Protecting natural, cultural, archaeological and other heritage sites and relics, however many of the sites are key tourism assets and among others.
Department of Arts and Culture National Arts Council (NAC) National Museums Board (NMB)	Safeguarding, developing and promoting Zambia’s folklore, tangible and intangible cultural heritage through two divisions, namely the Arts and Creative Industries Section the Culture and Folklore Section. Facilitating the development, promotion and nurturing of all forms of amateur and professional arts to a level of excellence and to promote the Arts into an integral part of the lives of people in Zambia. Management and development of four national museums, including important natural and cultural collections in key tourism centres
<b>Tourism development and promotion as a support function linked to core mandate</b>	
Ministry of Home Affairs Ministry of Transport	Facilitating tourism immigration and visa processes. – Planning and providing road access to tourism attractions – Planning and facilitating air access to and within Zambia.
Ministry of Local Government and Housing Ministry of National Development Planning	Ensuring integrated socio-economic planning and management at district level, including tourism. Positioning and including tourism in national development plans.
Ministry of Higher Education and Training Ministry of Finance	Advancement and quality assurance of tourism and hospitality training at schools, vocational and higher education levels. – Budget allocation for tourism development and promotion – Management of tourism tax regime.
Min of Lands, Natural Resources &	– Formulating and managing land policies affecting tourism – Formulating and enforcing environmental planning and impact

The tourism function is increasingly being devolved to provincial and local government levels.

- *Provincial level:* Under the emerging decentralisation policy provincial representation will be strengthened and the Department of Tourism envisages increasing its regional representation from four regional offices to 10 provincial offices. The ZTA also envisages setting up four regional offices to strengthen its presence on the ground.
- *Local government level:* The district and municipal authorities are responsible for tourism development and management “on the ground” in cities, towns and regions. At this level tourism forms an integral component of the IDPs of local authorities, where it is treated as one of the economic sectors in a local economy.
- *The private sector* is organised Tourism Council of Zambia (TCZ) comprising 10 national and local level hospitality and tourism associations, including Hotel & Catering Association, Professional Hunters Association, Safari Hunters Association, Travel Agents Association of Zambia, Wildlife Producers Association and local tourism associations in Livingstone, Lower Zambezi, Luangwa and Luapula. The aims of TCZ and its associations are primarily to act as consolidated “voices” for communicating to the Government issues that affect their sectors.

## 2.8.2 Financial and human capacity

MoTA has an operating budget of just over ZMK246 million (approximately USD 25 million) in 2017, which gives it limited scope for implementing key strategic interventions. About 70% of this amount goes towards personnel and administrative costs, leaving just approximately ZMK70 million for project implementation across all its divisions, including all national parks, heritage sites, tourism promotion, etc.

- DNPW is allocated almost 50% of the Non-PEs budget, which equates to ZMK 35 million and is inadequate for maintaining Zambia’s most valuable tourism asset: its natural environment and wildlife resources. All DNPW revenues accrue to the national treasury and the organisation has no incentive for generating addition income.
- Department of Tourism is allocated just over ZMK 14 million, of the non-PEs budget allocation of which ZMK 11 million of this is projected to accrue from the dedicated tourism levy<sup>15</sup> and to be redistributed, leaving the Department with a minute budget for conducting a wide range of functions.
- The Zambia Tourism Agency (ZTA) is allocated just more than ZMK 6.7 million. As indicated in Section 2.6.3 this amount is wholly inadequate for ZTA to do justice the important mandate of promoting Zambia as a tourism destination. ZTA’s funding allocation has progressively deteriorated over the past four years.
- Other recipients include NHCC (ZMK 265,000 but able to generate and retain revenues), Department of Arts and Culture (around ZMK 2 million, which includes operations of the national dance troupe) and Department of Planning and Information (about ZMK 2.5 million for statistics, research and strategic planning)

Concerning staff capacity, the restructuring proposals for MoTA (2015 provide) for the devolution of tourism to provincial and district level and this will require a substantial increase in personnel for the various departments in the Ministry. It is unclear how the operational requirements of such expansion and devolution of functions will be funded.

As highlighted in the Strategic Plan the limited tourism specialisation at management level in MoTA is a cause for serious concern and is at the root of much of the mistrust between public and private sectors and the limited implementation success of some key tourism projects.

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<sup>15</sup> During May 2017 the Tourism Development Fund stood at around ZMK2,2 million and no funds had been used

Most of the private associations function on a voluntary basis and the TCZ remains chronically underfunded. As a result, the private sector voice in tourism is fairly weak and its relationship with the public sector is tenuous.

### 2.8.3 Key success factors for efficient organisation and funding

- *Ensuring effective implementation and monitoring of plans and elevating the role of planning implementation and monitoring significantly.*
- *Advancing inter-governmental tourism integration and coordination and inculcating a common vision for tourism growth among the various Ministries.*
- *Improving the extent and utilisation of tourism financial resources, among others reviewing the collection mechanism of a bed levy and ensuring the effective and strategic application of the levy.*
- *Strengthening public-private partnerships through appropriate industry forums and platforms.*
- *Building tourism skills and capacity across government tiers and installing specialised tourism leadership at national level and securing equipped and skilled staff at provincial level.*
- *Ensuring greater coordination in culture and heritage tourism development and aligning the efforts of the various culture and heritage agencies.*
- *Establishing tourism specialisation in DNPW and cultural agencies and giving tourism development a much higher priority especially in DNPW and NHCC, given that these agencies own and manage Zambia’s most valuable tourism assets.*
- *Maximising tourism roles of MoTA and ZTA to avoid potential role and industry conflicts.*
- *Incentivising DNPW to take a more commercial approach in managing parks and protected areas and ploughing back revenues directly into its core conservation mandate.*

## 2.9 Summary of strategic opportunities and challenges

### 2.9.1 Key strengths, weaknesses, opportunities and threats (SWOT)

Based on Michael Porter’s competitiveness model<sup>16</sup> the following SWOT analysis pertains to key drivers of Zambia’s competitiveness, namely:

- *Resources:* natural and cultural resources, land and human resources
- *Demand conditions:* country positioning and brand image, visitor demand patterns, tourism economic yield
- *Support services:* Accommodation, amenities, access, infrastructure and related tourism services
- *Industry structure and governance:* policy, legislation, organisation, funding, collaboration, etc.

**Table 2. 2: SWOT Analysis Table**

Strengths and Opportunities	Weaknesses and Threats
<b>Resources</b>	
<ul style="list-style-type: none"> <li>• Large area under conservation, with ample opportunities for expansion in and around many protected areas</li> <li>• Parks largely un-crowded and authentic</li> </ul>	<ul style="list-style-type: none"> <li>• Many parks depleted of wildlife</li> <li>• Continued threats of poaching, overfishing, deforestation, vandalising of heritage, hydro-electric power and dams disturbing river</li> </ul>

<sup>16</sup> Porter, M.E. (1990, 1998) *The Competitive Advantage of Nations*, Free Press, New York, 1990.

Strengths and Opportunities	Weaknesses and Threats
<ul style="list-style-type: none"> <li>• Number of unique ecosystems associated with Zambezi and Congo river catchments</li> <li>• Variety and density of wildlife in some areas</li> <li>• Victoria Falls World Heritage site and other spectacular waterfalls</li> <li>• Variety of interesting cultural traditions</li> <li>• Various sites of ancient cultural heritage</li> <li>• Various innovative conservation management partnerships</li> <li>• Peaceful and very hospitable people</li> <li>• Existence of various hospitality and tourism training facilities</li> <li>• Various sites set aside for tourism development in national parks</li> </ul>	<ul style="list-style-type: none"> <li>• systems</li> <li>• Photographic and hunting tourism conflict in most protected areas</li> <li>• Human-wildlife conflict increasing in various areas</li> <li>• Communities don't see benefits in non-consumptive tourism and are reluctant to adopt it as a vision</li> <li>• Haphazard allocation of land in various GMAs</li> <li>• Visitor amenities, signage etc. lacking in many protected areas</li> <li>• Many protected areas and sites difficult to reach</li> <li>• Cultural tourism experiences not easily bookable and reachable</li> <li>• Inadequate quality of hospitality and tourism training facilities and teaching staff</li> <li>• Hospitality and tourism training supply not always in tune with industry needs and standards</li> </ul>

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#### Demand Conditions

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<ul style="list-style-type: none"> <li>• Victoria Falls a key destination on the regional tourist circuit</li> <li>• Well known and promoted safari destinations especially Lower Zambezi and Kafue</li> <li>• Part of the KAZA ecozone</li> <li>• Well connected by air</li> <li>• Central location in Africa and variety of entry points</li> </ul>	<ul style="list-style-type: none"> <li>• Low leisure tourism volumes and poor economies of scale for curb expansion of the industry</li> <li>• Seasonality of demand</li> <li>• Short length of stay of international travellers – extension rather than end destination</li> <li>• Perceptions of Zambia being expensive</li> <li>• Very limited and ineffective destination promotion and destination awareness</li> <li>• Over-dependence on fully packaged and safari travel segments – limited diversity of demand</li> <li>• Limited MICE demand</li> <li>• Immigration and visa access complicated and expensive and not conducive to tourism growth</li> <li>• Lack of a clearly differentiated positioning and tourism image</li> <li>• Limited travel awareness and participation among Zambians</li> </ul>
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#### Support services

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<ul style="list-style-type: none"> <li>• Excellent safari product, including walking safaris</li> <li>• High quality of safari guiding</li> <li>• Substantial number of high quality (4-5 star) rooms in Lusaka and Livingstone</li> <li>• Range of accommodation price and quality</li> </ul>	<ul style="list-style-type: none"> <li>• Skewed supply – gap between affordable and high end accommodation facilities</li> <li>• Poor and seasonal road infrastructure in and around main tourists sites and protected areas</li> <li>• Expensive and limited (especially domestic) air transport, both scheduled and charter</li> <li>• Quality of tourism facilities and services lack,</li> </ul>
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Strengths and Opportunities	Weaknesses and Threats
<ul style="list-style-type: none"> <li>• Good main road network</li> <li>• Water quality generally good</li> <li>• Banking services improving</li> </ul>	<p>especially in less developed tourism areas</p> <ul style="list-style-type: none"> <li>• Limited ground handling and touring services</li> <li>• Banking services improving but limited in less visited areas</li> <li>• Limited tourist-friendly nightlife and entertainment</li> </ul>

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#### Industry structure and governance

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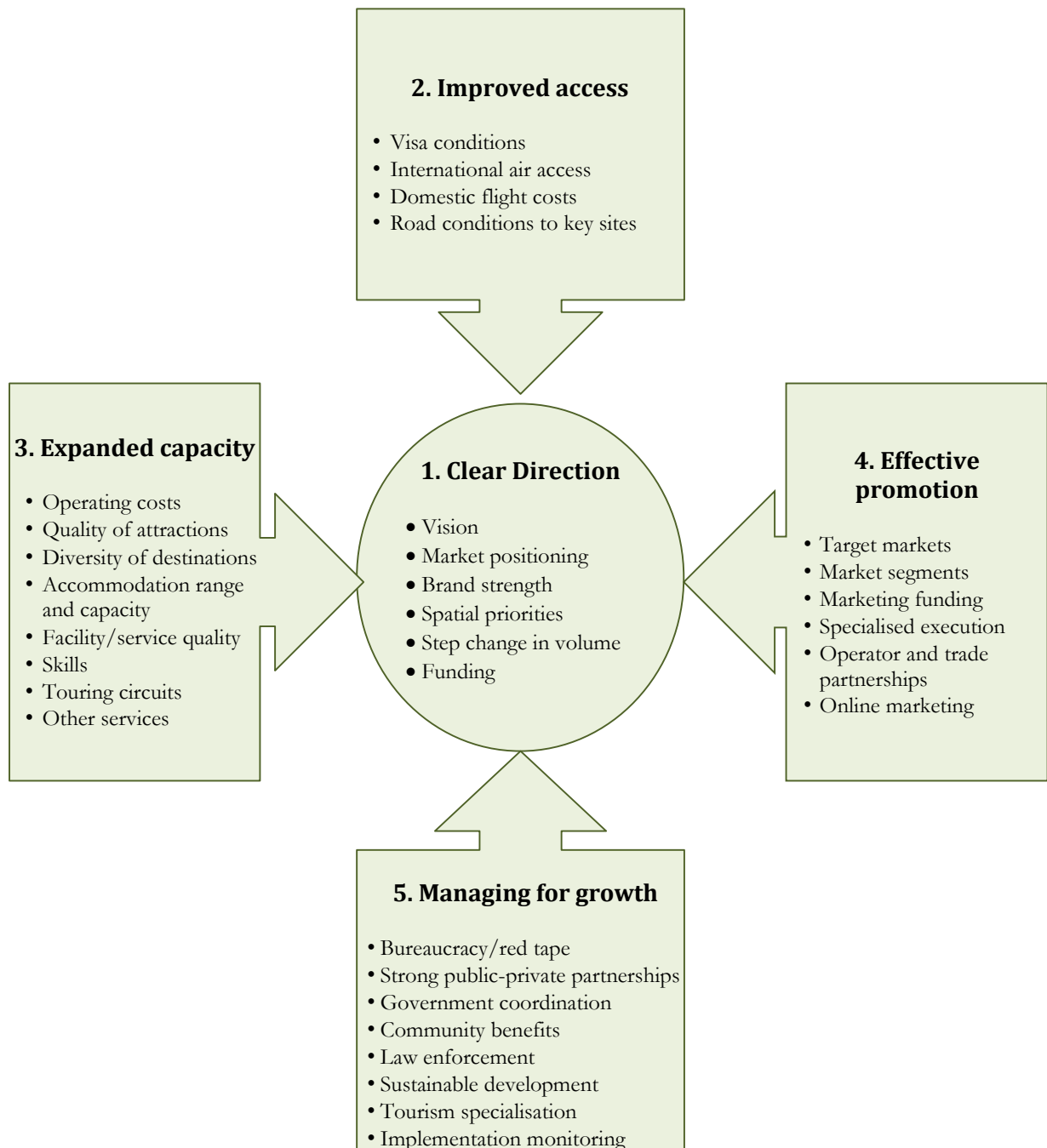
<ul style="list-style-type: none"> <li>• Good tourism and wildlife policies and legislation</li> <li>• Introduction of a dedicated tourism levy and bespoke tourism fund for future tourism development</li> <li>• Well-functioning nature and heritage conservation services</li> <li>• Private sector organised nationally and in some local areas</li> <li>• Statutory, flexible tourism promotion body</li> </ul>	<ul style="list-style-type: none"> <li>• Very limited public-private sector trust, partnerships and collaboration</li> <li>• Fragmented planning, poor implementation of plans and no consistent concession systems and policies in protected areas</li> <li>• Wholly inadequate government tourism funding and Government not convinced of the revenue potential of tourism</li> <li>• Few qualified tourism professionals in Ministry, none in DNPW, NHCC, etc.</li> <li>• Tourism capacity, understanding and focus lacking at local government level</li> <li>• Red tape, bureaucracy and over-regulation of tourism</li> <li>• High cost of doing business – taxes, infrastructure, etc.</li> <li>• Conflicts and lack of trust between government, communities and private sector</li> </ul>
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## 2.9.2 Summary of key future tourism growth drivers

The diagram below presents five key “drivers” for unlocking ambitious levels of future tourism growth in Zambia and indicates the main issues that need to be addressed under each.

The proposals formulated in the following sections of this strategic plan will focus on these aspects.

**Figure 2.11: Summary of key future tourism growth drivers**



## Chapter 3: Future growth direction

### 3.1 Tourism outlook

Tourism growth in Zambia over the next decade and beyond will no doubt be influenced by macro-environmental (political, economic, technological and social) events and trends. The strategy ahead will build on the following macro-environmental outlook and potential growth scenarios.

#### 3.1.1 Macro environment

The following key developments and trends in the macro environment will no doubt have a significant bearing on Zambia's tourism growth prospects and are given particular consideration in preparing the future growth strategy:

- *Positive international and regional growth prospects*

The UNWTO's long-term outlook and assessment for the development of global and regional growth in international tourist arrivals is presented in their UNWTO Tourism Towards 2030<sup>17</sup> publication and highlights:

- Worldwide tourism arrivals are expected to increase by an average of 3.3% a year during 2010 to 2030
- Worldwide growth will slow from 3.8% in the earlier years to 2.9% in the later years
- Arrivals to Africa are expected to grow by a higher average rate, 5% annually over the period, beginning at 5.4% and then slowing to 4.6%
- Within the African region, arrivals to Southern Africa are expected to grow at 4.5% between 2010 and 2020 then slow to 4.1% in the following period 2020-2030, comfortably above average worldwide growth rates.

- *Government's recognition of tourism as a driver of economic growth and development*

The 7<sup>th</sup> National Development Plan targets tourism as a key driver of economic diversification, geared towards reducing the country's reliance on copper mining and agriculture. The tourism programme contained in the 7<sup>th</sup> NDP includes five key strategies, namely:

- Promoting tourism-related infrastructure
- Promoting diversification of tourism products
- Promoting tourism source market segmentation
- Promoting domestic tourism
- Restocking national parks and improving law enforcement

- *Growing demand for experiential travel*

While consumer travel behaviour constantly changes due to demographic, technical and other factors, one of the most significant trends of relevance to Zambia is the increasing search for 'experiential travel', which among others implies:

- An interest in genuine interaction and engagement with other people, cultures and natural environments, perhaps directly in their homes for conversation, meals or homestays, doing walking safaris or through village walks or bike trips
- A wish for life-fulfilling experiences aligning with their personal interests and values perhaps through interaction with communities, schools, conservation and animal welfare bodies or learning new skills taught by local craftsmen, experts and guides

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<sup>17</sup> Tourism Towards 2030, UNWTO, Madrid, Spain, 2011

- A wish for immersion in a destination and to travel like a local or perhaps travel in a manner similar to the early days of safari using explorer-style bush camps

- *Emergence of international air hubs in Lusaka and Livingstone-Victoria Falls*

Various recent airport developments in Zambia and the region will no doubt impact positively on tourism development over the next decade. This includes the redevelopment of both the Lusaka and Livingstone international airports and rebuilding by Zimbabwe of Victoria Falls airport with runway length and terminal capacity to handle wide-bodied aircraft. These developments could:

- Deliver a potentially larger volume of visitors to the region than at present
- Position Livingstone/Victoria Falls as a gateway to Southern Africa, serving Zimbabwe, Zambia, Botswana, Namibia, Angola and beyond
- Improve connectivity to the growing air-hubs in the Gulf, particularly, but also in Europe and elsewhere

- *Improved road links to tourism development areas*

Tourism development in Zambia has traditionally been inhibited by lack of good road linkages to main tourist destinations. While much investment is required to open up new tourism areas various road development projects have, however, been launched over the past few years to improve road access.

The recent new road construction connecting Itezhi-Tezhi to the main Lusaka-Livingstone road is particularly significant since this will improve the time taken and quality of travel between Livingstone and the Kafue National Park and support the early development of the Lake Itezhi-Tezhi area as a major tourism destination. Other planned improvements include upgrades in the north, linking Samfya with Kawambwa, Mporokoso and onto Nsumbu at Lake Tanganyika; road from Mpika around the northern tip of South Luangwa NP; planned upgrades between Lusaka and the Chiawa GMA, and planned upgrade from Mwinilunga through to Angola.

A number of other road projects have been announced recently for the north and North West of Zambia connecting the Copperbelt with Angola, Democratic Republic of Congo and Tanzania and while they have both transnational and immediate local economic objectives, their provision will also support the development of tourism in the longer term.

- *Cross border linkages*

While the building of new roads in the north of Zambia linking neighbouring countries primarily supports the mining industry and transnational road network building, the recently established Kavango-Zambezi Transfrontier Conservation Area (KAZA) will no doubt have a significantly positive effect on tourism as it connects the Sioma Ngwezi National Park and surrounding GMA's with protected areas in neighbouring Botswana, Zimbabwe, Angola and northern Namibia. The recent introduction of a single KAZA visa is a major step forward in facilitating easy and seamless access within the region and paves the way for future collaborative immigration policies and procedures among countries in the region.

### **3.1.2 Growth scenarios**

A two-scenario approach has been adopted in projecting future tourism growth. On the one hand a 'business as usual' or low growth choice is examined and compared with a 'visionary growth' or high growth choice which assumes that Government adopts the recommendations put forward in this National Tourism Master Plan.

Uncertainties over the official visitor arrival statistics, particularly in relation to purpose of visit, led the consultants to recalibrate the leisure tourist arrivals, using Livingstone as a proxy for Zambia, and examining the international visitor arrivals by air and road in and around that town, to build a baseline



position from which to extrapolate. The assumptions underpinning each scenario and projected results is summarised in the table below.

**Table 3.3: Growth Scenarios**

<b>Assumption Factor</b>	<b>Business-As-Usual Scenario</b>	<b>Visionary Growth Scenario</b>
Government approach to tourism	No changes in Government's approach to and policies for the tourism sector	Government recognises the value of tourism and makes available a suitable resources for implementing the strategies and actions contained in the Master Plan.
	A largely ad-hoc and fragmented approach to tourism development	Focused tourism development that capitalises on Zambia's natural, cultural and heritage uniqueness's and expands tourism systematically, strengthening and building on what has already been developed
	No change to the tourism budget of MoTA and Zambia Tourism Agency (ZTA)	Substantially more financial and human resources allocated to tourism development and promotion
	Tourism regarded as the sole function of the Ministry of Tourism and Arts and its agencies	A commitment by all related government institutions to address the constraints facing tourism growth and to prioritise tourism when designing their programmes
	Increased government tourism regulations, heavy taxation and unbridled bureaucracy and red tape	An increasingly liberalised business environment that is: <ul style="list-style-type: none"> <li>• Government led – i.e. Government providing the overall direction, policies, regulatory framework and growth measures for sustained private tourism investment and community participation</li> <li>• Private sector driven – i.e. tourism investment and business operations being in the hands of private entrepreneurs, within the leadership framework set by Government</li> <li>• Community based – i.e. local citizens and civil society in general sharing in the potential benefits and responsibilities associated with a growing tourism sector</li> </ul>
Marketing	Marketing budget keeps fluctuating and marketing efforts fragmented	Significant increase in marketing financial and human resources
Partnerships	Lack of trust and collaboration between government agencies, private tourism sector and local communities	A vibrant partnership and trust relationship between Government, private sector and civil society
Sustainability and	Natural, cultural and heritage	Improved protection and community

Assumption Factor	Business-As-Usual Scenario	Visionary Growth Scenario
resource protection	resources poorly protected and depleted through unsustainable use	ownership of natural, cultural and heritage resources
Air access	The Livingstone/Victoria Falls Airport Hub receives wide-body aircraft during 2019/2020, however this is not capitalised on by Zambia	The Livingstone/Victoria Falls Airport Hub receives wide-body aircraft during 2019/20 and the Zambia Tourism Agency has the resources to take advantage of this situation
Annual growth – international tourism	1.5% per annum growth <sup>18</sup> across all international arrivals from 2015 to the new base year of 2018 and on until 2023.  2% per annum growth from 2024 onwards in delayed recognition of the expansion of the Livingstone/Victoria Falls Airport Hub	1.5% growth from 2015 until new base year 2018  Leisure arrivals grow 10% annually throughout 2018 to 2038 but at 14% per annum during 2018 to 2028 and then slowing to an average 6% thereafter  Business and VFR (“other” category) arrivals grow at 1.5% per annum from 2018 to 2021, 3% from 2022 to 2023 and 4% thereafter <sup>19</sup>
Annual growth – domestic tourism <sup>20</sup>	Domestic tourism to grow at the same level as international tourism, 1.5% per annum until 2023 then rising to 2% thereafter	Domestic tourism to grow at 1.5% between 2018 and 2023 and then grow at 3% per annum thereafter

**Table 3.4: Financial Implications of Growth Scenarios**

**Implications for 2038** (see detailed projections in Addendum A)

Growth Indicator	Business-As-Usual	Visionary Growth	Difference
Additional International Visitors	0.44 million per annum	1.63 million per annum	1,190,000 visitors p.a.
Additional International Expenditure	US\$0.25 billion per annum	US\$3.24 per annum	US\$3 bn revenues p.a.
Additional Domestic Bed Nights	4.6 million per annum	6.9 million per annum	2.3 million domestic bed-nights p.a.
Additional Domestic Expenditure	US\$0.3 billion per annum	US\$0.45 billion per annum	US\$ 150 million domestic revenues p.a.
Additional Guest Rooms	15,400	40,600	25,200 guest rooms
Additional Safari Vehicles	170	1,200	1,030 safari vehicles

<sup>18</sup> Based on growth achieved over the last three to five years (MoTA statistics)

<sup>19</sup> Using the UNWTO growth rate for international arrivals in Southern Africa from 2020)

<sup>20</sup> Domestic tourism has been calculated using the official guest rooms available in Zambia in 2015, applying an assumed 1.2 double occupancy rate to find annual bed nights and then deducting a figure already calculated for international bed nights.

The scenario choice will have major implications for Zambia's tourism economy. The differences in outcomes between the Business-as-Usual scenario and the Visionary Growth scenario are large, including additional US\$3 billion per annum in international tourist revenues and more than 25,000 additional hotel rooms.

## 3.2 Growth aspirations

Based on an assessment of the country's resources, analysis of the global and regional tourism context and extensive consultations with stakeholders, the Government and its partners in private sector and civil society has adopted the Visionary Growth scenario outlined above.

### 3.2.1 Vision 2038

The following vision captures the ambitions of the Zambian tourism industry towards 2038:

*Zambia ranks among the most visited holiday destinations in Africa and is a regional conference hub with a high quality, diversified and sustainable tourism industry that is a major contributor to the economic and social well-being of Zambians*

### 3.2.2 Growth Objectives

Implementation of the assumptions in the Visionary Growth Scenario and adoption of Vision 2038 will provide the enabling environment for the following growth objectives to be realised by 2038:

- Increasing international arrivals from 0.98million in 2018 to 2.61million in 2038
- Increasing the average length of stay from 4 days in 2018 to 6 days in 2038
- Significantly expanding the proportion of visitors received between October and April
- Increasing international tourism receipts from USD 562.9million in 2018 to USD 3,802.4 million in 2038 (before deduction of VAT incentives)
- Creating approximately 163,000 new direct and indirect employment opportunities<sup>21</sup>
- Increasing the supply of tourist accommodation by adding 40,000 new hotel rooms
- Increasing the number of specialist safari vehicles by approximately 1,200

### 3.2.3 Guiding growth principles

Development planning has evolved and today it is all about managing change efficiently and sustainably, whilst still allowing for flexibility and innovation. It's about reaching a consensus amongst key stakeholders, government, the private sector and the community, as to how best to plan and implement tourism development that can have a wide range of impacts and benefits all. In line with this dynamic planning paradigm, tourism development in Zambia towards 2040 will strive to be:

#### **Sustainable**

Conduct all tourism development in harmony with natural and cultural resources, advance sustainable management practices, promote social cohesion and give due respect to cultural traditions.

#### **In partnership**

Encourage true partnerships between public, private and community stakeholders, working together to enhance Zambia's tourism competitiveness and to deliver coordinated and quality tourism growth.

#### **Inclusive**

Value local citizens and communities as hosts and custodians of tourism resources, facilitate their participation in decision-making and ensure that they share in tourism benefits.

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<sup>21</sup> Based on the international rule of thumb that every 30 additional tourists attracted create one direct and two indirect job opportunities

### **Well-planned**

Plan, design and manage tourism development in an integrated manner, in response to the Zambia context, local character and distinctiveness, protect and enhance nature and cultural heritage resources.

### **Quality focused**

Provide imaginative thinking that delivers contemporary and contextual projects and ensure a high quality, visually attractive, safe and well-managed nature and cultural heritage environment.

#### **Zambia in 2038 – a visionary view**

*Zambia has well managed parks and GMAs due to the tremendous assistance it received early on in the coordinated regeneration effort by many of the wildlife NGOs and a firm commitment from Government to the development of a sustainable tourism industry. Besides good management, anti-poaching and infrastructure support, many of the communities within and around the GMAs are now well integrated into the natural and cultural heritage environment. The ZTMP introduced in 2017 with the full support of the president, has succeeded in promoting Zambia as one of the top ecotourism destinations in Africa with world-class recognition for conservation.*

*The foundations of Zambia's diversified nature and cultural heritage product - wildlife viewing, cultural and community interaction, ecotourism, water sports and adventure were established in 2018 with a development programme to put in place the necessary supporting tourism infrastructure on the one hand and on the other, a capacity building programme to encourage and support emerging tourism enterprises. The community development programme, in particular, has received much acclaim internationally for its imaginative initiatives, working in close collaboration with the private sector.*

*The implementation of IDPs and Action Area Plans has largely succeeded in containing built sprawl and protecting the diverse landscape and animal corridors. Wildlife is abundant. Previous conflicts between animals, communities, and hunting is now well managed and under complete control.*

*Since the redevelopment of both Lusaka and Livingstone airports, and the expansion of Victoria Falls into a major African tourism hub, growth in tourist arrivals has been impressive, justifying the opening of the Kafue flagship Itezhi Tezhi lakeside lodge as part of the planned integrated resort development. The second phase of this development followed very quickly with a further expansion of Ngoma airport and additional 200 rooms. With foresight, the Government recognised early on the potential of Kafue as a major multi use nature, cultural heritage and health tourism attraction. Lusaka is recognised as the African conference city supported by culture and entertainment. Equally, the heritage town of Livingstone has slowly been evolving over the years and is now a thriving tourism centre full of vitality and charm. Victoria Falls is the attraction in Africa (and the World) and is much appreciated for its sensitive development without compromising the integrity of the resource.*

*Zambia has been concentrating for the last 10 years on renovating and improving the quality and range of its accommodation in line with the differentiated character tourism development areas. The number of properties has grown particularly along the Luangwa Valley and now attracts a premium rate, especially since the opening and upgrading of the airstrips and interconnected road system. Wildlife viewing is big business. But these days, just as many go trekking in the parks and neighbouring GMAs. Visitors are attracted to the pristine environment and also to the local villages where the development of trails, handicrafts and cultural events has provided additional income and employment opportunities for many throughout the country.*

*To the north, the development of road circuits in Bangweulu and around the Luapula lakes and waterfalls have opened up the overland adventure market, enabling visitors to enjoy the many heritage attractions and spectacular bird life on offer in the parks and wetlands. A waterfront resort is due to open shortly at Kasaba Bay adding a further 50 rooms to the country's stock providing other niche markets, as it caters to health-conscious customers with spa facilities, diving and adventure.*

*In the Copperbelt, business is forging ahead with many businesses and visitors supporting the nearby cultural heritage sites. Wildlife is slowly returning to the parks. In the west, the parks are also benefiting from further visitors and the excellent on-going conservation measures put in place by the KAZA trans-frontier project. With the increase in international visitor numbers, so to has domestic tourism benefitted, especially in Siavonga, Samfya and the Kafue Flats providing a range of*

*accommodation and visitor experiences including water sports and wildlife viewing enabling locals to appreciate and proudly promote their country's nature and cultural heritage resources.*

*All in all, Zambia in the year 2040 is a great place to visit. It has a strong economy with less dependence on international aid. It has good access, the country is well planned, and its nature and cultural heritage is fully protected. Above all, tourists love the slow, easy pace of life and welcoming environment. It certainly got its act together.*

### 3.3 Growth foundations

Achieving the ambitious growth vision means that Zambia will have to compete successfully and win over market share from other destinations in Southern Africa. This requires adopting a clear market position that differentiates Zambia from other destinations and a targeted market and product development approach as follows.

#### 3.3.1 Competitive positioning

It is essential for Zambia to establish and acquire a market positioning that sets it apart from the many nature-based tourism destinations in Southern Africa and that forms the basis of Zambia's tourism development and promotion strategy.

In comparing Zambia's inherent resources and market position with competitors in the region, the following is apparent, as indicated in Figure 3.12. below:

- South Africa (nine world heritage sites), Tanzania (seven world heritage sites) and Zimbabwe (five world heritage sites) are better positioned in terms of unique "bucket list" sites to visit.
- Botswana, Tanzania and South Africa offer the Big 5 and more varied wildlife and safari experiences.
- Most destinations are on par with Zambia for cultural uniqueness.
- Tanzania, Zimbabwe and South Africa offer a greater variety and quality of historical sites and general scenery.
- Zambia is at a disadvantage regarding proximity to major markets, cost of travel and ease of access.

**Figure 3. 12: Zambia vs. regional competitors - inherent tourism resources and market position**

Color Key	Zambia at advantage		Zambia equal to		Zambia at disadvantage	
	Botswana	Tanzania	Namibia	Malawi	Zimbabwe	RSA
<b>REGIONAL COMPETITORS</b>	Botswana	Tanzania	Namibia	Malawi	Zimbabwe	RSA
<b>Resources</b>						
Unique sites/'bucket list' experiences	Green	Red	Green	Green	Red	Red
Wildlife and safari	Red	Red	Green	Green	Green	Red
<b>Variety of unspoilt nature/culture</b>	Green	Green	Green	Green	Green	Green
Cultural uniqueness	Green	Green	Green	Green	Green	Green
Historical sites and relics	Green	Red	Green	Green	Red	Red
<b>Pristine rivers, lakes and water bodies</b>	Green	Green	Green	Green	Green	Green
Skilled tourism human resources	Green	Red	Green	Green	Red	Red
Landscapes and scenery	Green	Green	Red	Green	Green	Red
<b>Market Position</b>						
Proximity to major markets	Red	Green	Red	Green	Red	Red
Cost and price	Green	Green	Red	Red	Green	Red
Ease of access and purchase	Red	Red	Red	Green	Red	Red
<b>Image, health, safety</b>	Red	Green	Red	Green	Green	Green

However:

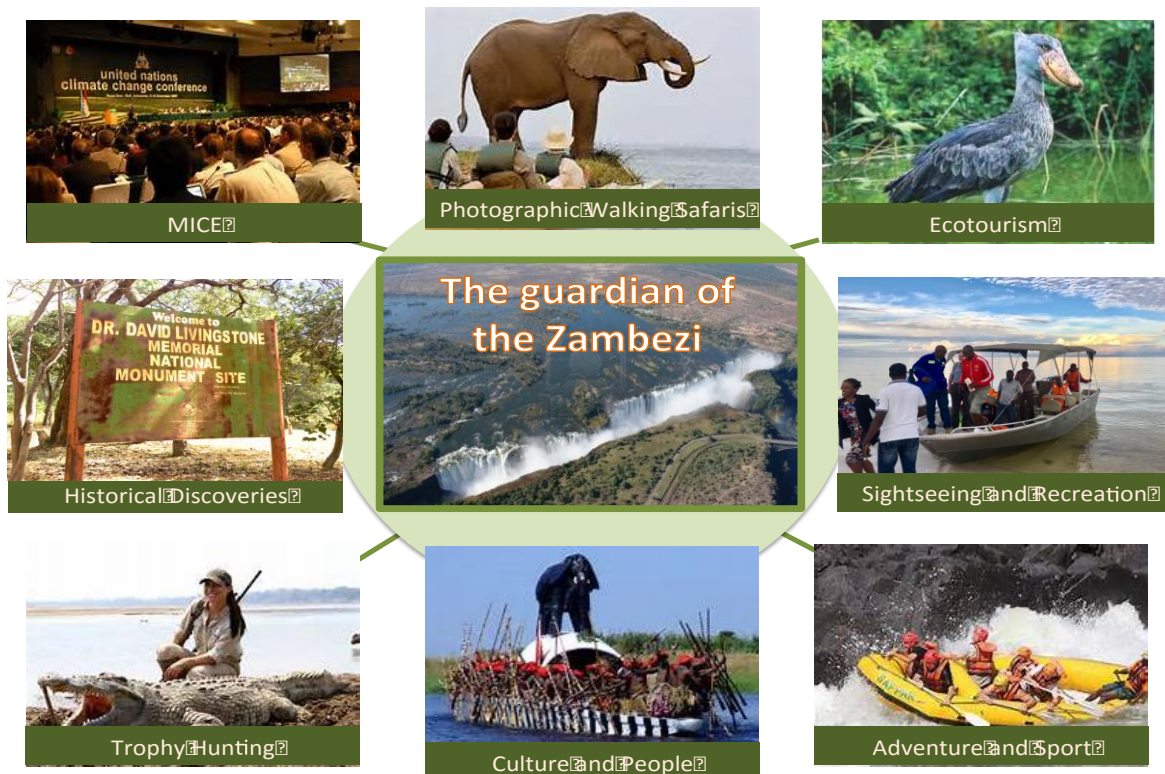
- Zambia owns more major African lakes (Kariba, Tanganyika, Mweru), major rivers (Zambezi, Luangwa, Kafue) and large water bodies (Victoria Falls and other waterfalls, Bangweulu, Kafue Flats, Liuwa Plains, etc.) than any other country in the region; water bodies with unique biospheres that sustain Africa’s prolific fauna and flora and inspire unique cultural traditions.
- As a result, Zambia offers a greater *variety* of unspoilt nature and culture experiences than most destinations in the region.
- In addition, the country has a stable image, is safe to travel and the people are exceptionally receptive and hospitable.

Based on the recognition that Zambia’s tourism uniqueness is vested in its many iconic African water bodies, the tourism strategy builds its differentiation on the most iconic and well-known of these, the Zambezi River, since:

- The name “Zambia” is deduced directly from Zambezi.
- Zambezi is the fourth longest river in Africa, the longest east-flowing river in Africa and the largest flowing into the Indian Ocean from Africa.
- It is home to the mighty Victoria Falls, Zambia’s most visited attraction.
- Zambia’s most notable wildlife areas namely Lower Zambezi, South and North Luangwa, Kafue National Park and ten other national parks are all located in the Zambezi catchment area.
- The source of the Zambezi is located in Zambia.

Zambia will be positioned<sup>22</sup> as the “*mother/guardian*” of the Zambezi, a positioning that conveys a sense of ownership of Africa’s rivers and water bodies and strongly speaks to the diversity of experiences on offer and appeals to a wide variety of market segments.

**Figure 3.13: Key elements of Zambia’s tourism positioning**



<sup>22</sup> Positioning should not be confused with a brand slogan, as it is a strategic phrase that encapsulates the basis on which Zambia is differentiated from competitors. A brand slogan could be formulated to express the positioning with suitable market appeal.

### 3.3.2 Market and product focus








In line with the destination positioning, Table 3.5 below sets out and describes eight potential target market segments and indicates a range of product development opportunities to complement each segment.

*Table 3.5: Potential target markets and related product opportunities*

Segment	Motivation and expectations	Product opportunities
<b>Packaged Explorer</b>   	<p>Large potential growth segment.</p> <p>Medium to high volume, mid to high priced.</p> <p>Cautious “soft” exploration – lured by the fame of Victoria Falls and the African explorer spirit. Looking for somewhere different – it’s partly about sharing the story.</p> <p>Primary: Victoria Falls as a “bucket list” experience, coupled with a safari.</p> <p>Secondary: local culture (superficial), soft adventure (e.g. animal encounters, helicopter flights, etc.), scenery, relaxation, food.</p> <p>Value for money at hotels, catering, guiding, etc. important.</p>	<p><i>Current locations:</i> Mainly Livingstone and some South Luangwa. Often combine Zambia with other Southern African destinations.</p> <p><i>Future locations:</i> Kafue as a value-for-money safari experience, combined with Livingstone and South Luangwa.</p> <p><b>Product opportunities:</b></p> <ul style="list-style-type: none"> <li>• Larger mid-range, well designed safari resorts in National Parks</li> <li>• Wider range of bookable “soft adventure” activities e.g. bush walks, horse-riding, cycling, quad biking, etc.</li> <li>• Authentic and interactive cultural interaction</li> <li>• Experiencing town life in Livingstone, Mfuwe –streetscapes, seating, etc.</li> <li>• “Living” cultural experiences: Zambian music, art, culinary experiences</li> </ul>
<b>Exclusive Safari</b>   	<p>Low volume, high priced.</p> <p>Expect exclusivity of experience and personal service and prepared to pay for it. Well travelled and expect a high-quality, deeper exclusive wildlife viewing in pristine environment with all or most of the Big 5 to be seen.</p> <p>Pampered bush luxury with excellent food and extraordinary (usually tented) room finishes and amenities. Personal service such as highly knowledgeable ranger assigned to each group.</p> <p>Walking and driving safaris in open safari vehicles. Keen on other activities such as canoeing, hot air ballooning, game fishing, etc.</p>	<p><i>Current locations:</i> Northern Kafue, Lower Zambezi, Mosi-oa-Tunya, South Luangwa NP.</p> <p><i>Future locations:</i> Expanding the above and North Luangwa.</p> <p><b>Product opportunities:</b></p> <ul style="list-style-type: none"> <li>• Opening up new concession areas through proper research and transparent concessioning (Lower Zambezi, Luangwa, Kafue, Western Zambia)</li> <li>• Restocking depleted wildlife areas</li> <li>• Re-organising GMAs to bring order between consumptive and non-consumptive tourism</li> <li>• Leveraging value from non-productive tourism title/concessions</li> </ul>
<b>Intrepid Explorer</b> 	<p>Substantial overlanding and backpacking market for Livingstone. Expected to expand.</p> <p>Medium volume, mid to budget priced.</p> <p>Confident “hard” exploration - looking for the “real” Zambia, in search of extraordinary experiences will be prepared to go the extra mile, go to less visited places and sacrifice comforts to</p>	<p><i>Current locations:</i> Mainly Livingstone and South Luangwa.</p> <p><i>Future locations:</i> Western Zambia, Bangweulu Wetlands, Northern waterfall and lake circuit, North-West heritage circuit.</p> <p><b>Product opportunities:</b></p> <ul style="list-style-type: none"> <li>• Engaging local product owners and communities in packaging and developing</li> </ul>

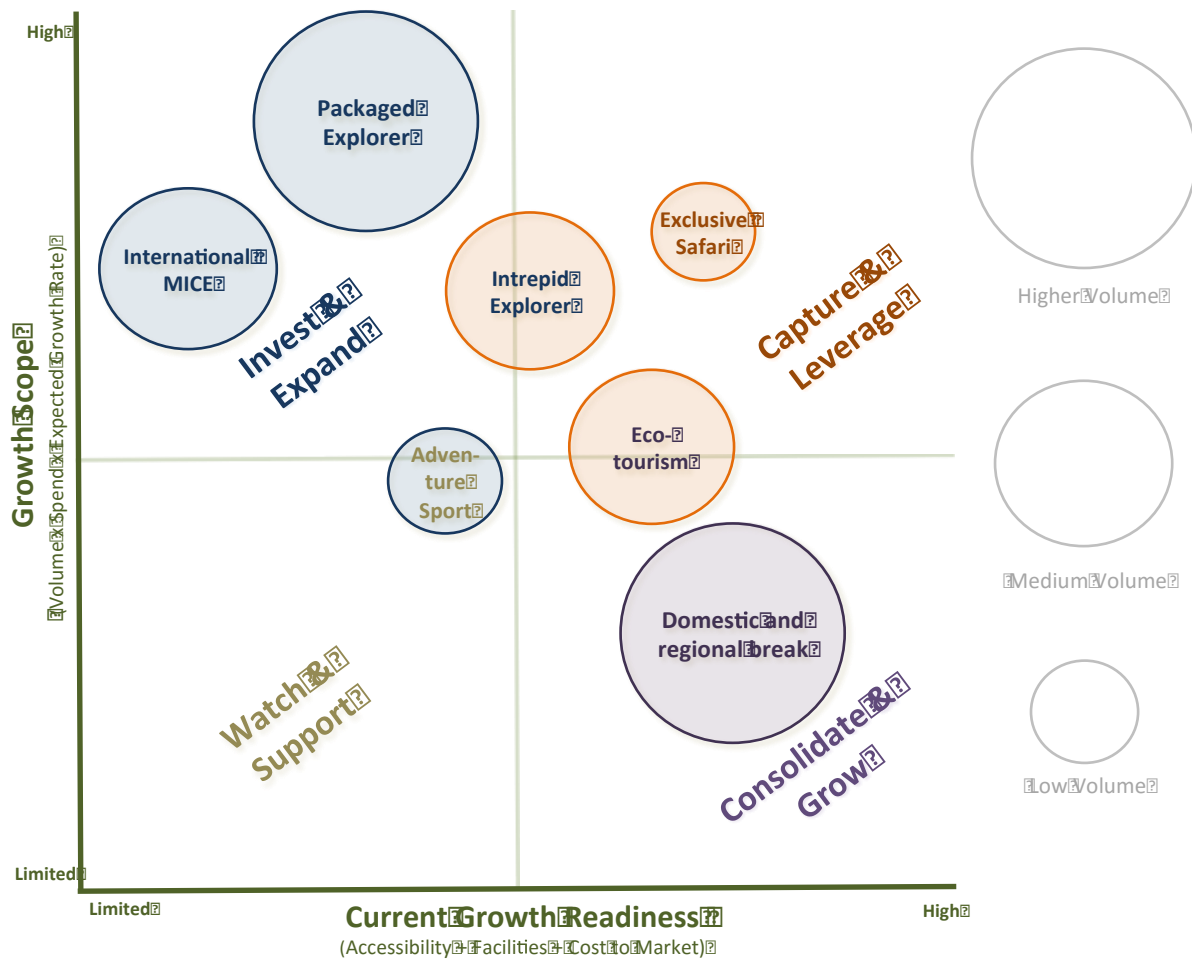
Segment	Motivation and expectations	Product opportunities
	<p>do so.</p> <p>Adventure, adrenaline, wildlife, cultural and environmental interaction (in its broadest sense). Looking for community-based experiences (food, attending local ceremonies, chat, etc.).</p> <p>Often independently organised. Quality and nature of hotels, catering, guiding, etc. not a particular priority, prepared to have basic service levels if the experience is special.</p>	<p>self-drive circuits including accommodation, cultural interaction, eco experiences, rest and stop-points, camping sites, signage</p> <ul style="list-style-type: none"> <li>• Trails and activities at waterfalls</li> <li>• Working with local communities in developing tourism e.g. tracking endemic species like Shoebill and Lechwe, indigenous canoe rides, cycling in the community, staying with a local community, exploring local food</li> </ul>
<p><b>Domestic and Regional Breaks</b></p> 	<p>Growing domestic middle class able to travel.</p> <p>High volume, budget priced.</p> <p>Main motivation is to get away from the stresses and strains of everyday work and family life, spend quality time relaxing and enjoying the good things in life.</p> <p>Livingstone currently main destination.</p> <p>General sightseeing, relaxation along the lakesides, including soft activities like browsing, shopping, boat rides, visits to evening entertainment.</p> <p>Expatriates favour ecotourism and nature and may be more active and in need of experiential travel.</p>	<p><i>Current locations:</i> Livingstone, Mfuwe, cultural ceremony locations.</p> <p><i>Future locations:</i> Siavonga, Samfya, North West (for Copperbelt), limited Lake Tanganyika.</p> <p><b>Product opportunities:</b></p> <ul style="list-style-type: none"> <li>• Waterfront recreation, shopping and entertainment hubs</li> <li>• Incentivising development of local guesthouses/B&amp;Bs/home stays</li> <li>• Family leisure and theme parks</li> <li>• High-quality picnic facilities</li> <li>• Transforming redundant government facilities e.g. hostels, hotels, army bases into inclusive domestic travel resorts and establish government travel club</li> <li>• Conducting tourism while away visiting friends and family (VFR)</li> </ul>
<p><b>MICE delegates</b> (Meetings, Incentives, Conventions, Exhibitions)</p> 	<p>Growth segment in Africa - majority below 500 delegates.</p> <p>Medium volume, medium to high priced.</p> <p>Meet and discuss issues of mutual concern with peers. Key motivation is convenience and professionalism of venue and services.</p> <p>Suitable air and road access and meeting venue, equipment and support services like hotels, transport, meals etc. of key importance.</p> <p>Exotic and interesting location is a key factor once the primary boxes have been ticked. After hours entertainment, nightlife and local engagement important.</p> <p>Many delegates do pre and post conference tours to other areas</p>	<p><i>Current locations:</i> Mainly Lusaka.</p> <p><i>Future locations:</i> Livingstone and smaller regional and local conferences in other cities.</p> <p><b>Product opportunities:</b></p> <ul style="list-style-type: none"> <li>• Refurbish Mulungushi as state-of-the-art - conference and exhibition centre</li> <li>• Develop “safe” tourism nodes in Lusaka (e.g. cultural village as entertainment, nightlife, shopping area; Lusaka NP for weekend breaks; etc.</li> <li>• Establish inner-city improvement district – pedestrianize, ramp up security, bring back residential to CBD, etc.</li> <li>• Conference centre in Livingstone</li> <li>• Establish National Convention Bureau in ZTA headed by senior person</li> </ul>



Segment	Motivation and expectations	Product opportunities
<p data-bbox="225 241 427 300"><b>Adventure Sport Enthusiasts</b></p>   	<p data-bbox="488 241 868 358">A collective segment of small, niche adventurous outdoor sport activity interests. There is often a significant element of skill and risk involved.</p> <p data-bbox="488 389 868 416">Low volume, mid- to budget priced.</p> <p data-bbox="488 448 900 595">Key motivation will be the particular activity. Key segment to consider are adventure biking, kayaking, triathlon/endurance racing, fresh water diving, car rallies.</p> <p data-bbox="488 627 884 743">Other niche segments to consider for expansion include tour cycling, off-road motorcycling, canoe racing, tiger fishing, endurance swimming, etc.</p> <p data-bbox="488 775 900 864">For some sightseeing and culture will be important additions. Charity and teambuilding component to some trips.</p>	<p data-bbox="932 241 1347 300"><i>Current locations:</i> Mainly Livingstone and around Lusaka.</p> <p data-bbox="932 331 1385 421"><i>Future locations:</i> Various locations over Zambia: Mostly around forests, lakes, rivers and other topographies.</p> <p data-bbox="932 465 1187 492"><b>Product opportunities:</b></p> <ul data-bbox="932 515 1394 819" style="list-style-type: none"> <li>• Adventure sport mostly organised by private persons and associations</li> <li>• Work with NHCC and local communities in mapping and layout of hiking, running and mountain biking trails at more accessible heritage sites and forest areas , develop an adventure circuit</li> <li>• Anchor events strategy to partner 2-3 major regional event organisers, focusing on adventure sport and living culture</li> </ul>
<p data-bbox="256 913 389 940"><b>cotourists</b></p>    	<p data-bbox="488 913 884 972">Growing segment and very well suited to Zambia.</p> <p data-bbox="488 990 868 1016">Low volume, mid- to budget priced.</p> <p data-bbox="488 1034 900 1214">Specialise in environmental and cultural immersion, including bird watching, unique flora and fauna phenomena (e.g. bat migration), history and heritage, archaeology, mining, angling and fly-fishing.</p> <p data-bbox="488 1232 900 1348">The appeal is about discover new environmental and cultural phenomena and species (e.g. new endemic bird species) and adding them to the “list”.</p> <p data-bbox="488 1366 900 1482">For some general sightseeing, wildlife safaris and culture will be important components of a trip – probably as an extension.</p>	<p data-bbox="932 913 1347 1003"><i>Current locations:</i> Mostly limited to main tourist areas in Livingstone and South Luangwa.</p> <p data-bbox="932 1021 1394 1200"><i>Future locations:</i> All over Zambia: local communities, historical trails and sites, indigenous forests, rivers and lakes, archaeological sites. For birding Lochinvar, Blue Lagoon, Bangweulu Wetlands, Chitunta Plain and other IBA sites.</p> <ul data-bbox="932 1218 1394 1496" style="list-style-type: none"> <li>• Identify ecotourism sites with exceptional value and prioritise the most viable ones</li> <li>• Step up protective measures/barriers/law enforcement where necessary to keep resources intact</li> <li>• Develop visitor facilities e.g. pathways, viewing platforms, hides, signage</li> <li>• Work with communities in developing camping, local lodging, guiding services</li> </ul>

The growth potential of the segments and readiness of Zambia to accommodate significant growth in these segments differ and growth strategies are framed accordingly. The size, growth potential and readiness of Zambia to accommodate additional growth in the short to medium term is presented below:

Figure 3.14: Segment growth prospects



The following four growth strategies will be followed to capitalise on the potential offered by the eight identified market segments in the short to medium term, considering the current capacity and demand:

- Capture and leverage:* The focus will be on raising market demand for segments that offer substantial opportunity for growth, which Zambia is ready to accommodate. Product development will be aimed at leveraging value by improving and adding facilities where feasible, enhancing sustainability of resources and ensuring community benefits and ownership.
- Invest and expand:* The focus will be on product investment and expansion and improved organisation for segments that offer high growth potential and where Zambia is not yet ready to accommodate a surge in growth. Marketing will aim at building up awareness of Zambia among these segments and getting ready for activating such demand immediately when product capacity and organisation has been substantially expanded.
- Consolidate and grow:* The focus will be on consistently building and growing segments that may not offer immediate high growth but where Zambia is ready to accommodate such growth and where additional arrivals and expenditure can be consolidated based on pent-up demand.
- Watch and support:* Segments that do not offer much growth potential and for which Zambia is not particularly well-gearred will be put on a watch list and left largely to private investors to pursue, in which instances Government will consider support for such ventures on a case-by-case basis.

The following approaches will be followed in activating the growth strategies outlined above:

**Table 3.6: Approaches to Growth Strategies**

Strategy	Segments	Approach
<b>Capture and leverage</b> 30% of resources	<ul style="list-style-type: none"> <li>• Exclusive safaris</li> <li>• Ecotourists</li> </ul>	<p>These segments offer substantial scope for growth and Zambia is relatively well poised with adequate attractions and services to immediately accommodate additional growth.</p> <p>A major public-private marketing initiative will be launched in the short term to raise awareness of brand Zambia among the travel trade and consumers fitting these segments and to capture as large a slice of the market as possible.</p> <p>Products and resources serving these sectors will be sensitively expanded, improved and preserved with a focus on community ownership. These include concessions in the major national parks and their GMAs.</p>
<b>Invest and Expand</b> 50% of resources	<ul style="list-style-type: none"> <li>• Packaged Explorers</li> <li>• Intrepid Explorers</li> <li>• MICE</li> <li>• Birders</li> </ul>	<p>These segments offer major scope for growth, however Zambia needs to expand capacity of attractions, facilities and services to accommodate substantial growth in arrivals</p> <p>The focus over the short to medium term will be on product investment and improvement, accompanied by a build-up promotional approach to ensure market activation as capacity expands. Specific focus will be on improvement of major attractions like the national parks, Victoria Falls and other key sites, development of larger scale safari lodges and resorts, development of self-drive touring circuits and heritage attractions and the expansion and improvement of MICE facilities.</p> <p>Consumer and trade marketing aimed at these segments will be significantly increased as larger scale developments come on stream.</p>
<b>Consolidate and Grow</b> 20% of resources	<ul style="list-style-type: none"> <li>• Domestic and regional breaks</li> </ul>	<p>The domestic segment offers moderate short-term scope for growth, however Zambia is relatively well poised with substantial public and private sector capacity to immediately accommodate such growth.</p> <p>A consistent marketing approach will be followed to consolidate available market demand through targeted campaigns and messages. For the domestic market investment will be encouraged over the medium term in family-friendly attractions, entertainment facilities and affordable accommodation.</p>
<b>Watch and Support</b> No dedicated resources	<ul style="list-style-type: none"> <li>• Adventure sport enthusiasts</li> </ul>	<p>This segment offers limited growth prospects and while Zambia has the resources to cater for the segment the country is not particularly well geared to accommodate growth in the short to medium term.</p> <p>As such it will be left largely to the private sector to initiate expansion of the sector, with in-kind support from public sector.</p>

### 3.4 Strategic goals for unlocking tourism growth

Based on the findings of the situation analysis, achieving the targeted growth will require concerted strategies and actions in respect of key growth factors and the following goals are set in this regard:

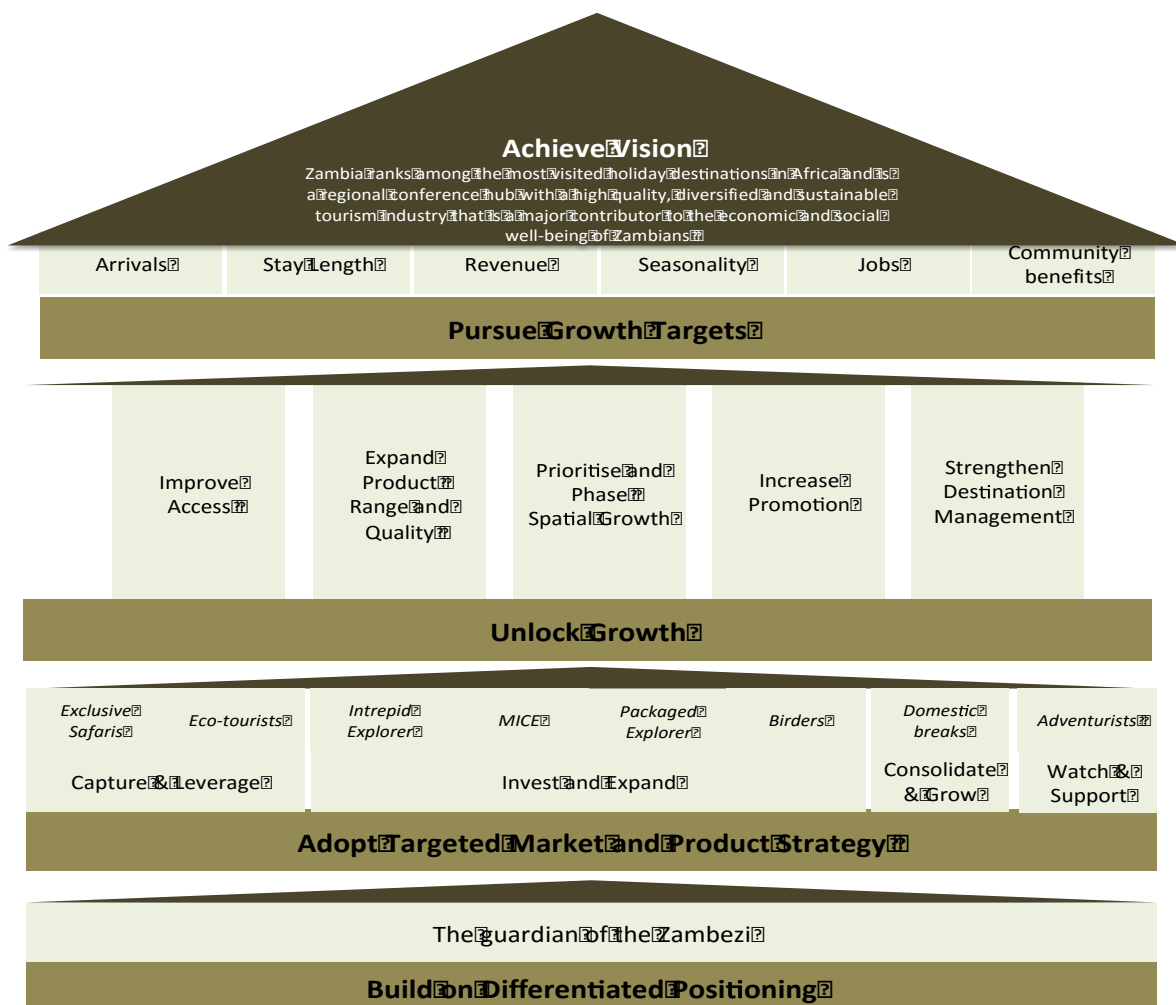
6. ***Developing suitable tourism products in line with clearly defined spatial structure plan.*** Such spatial development framework should identify priority Tourism Development Areas and propose catalytic product development interventions that appeal to the target market segments.
7. ***Providing easy and affordable tourist access.*** Most tourists are faced with time and budget constraints and reaching their Zambian destinations quickly and cost-efficiently is a key

requirement. Much work is required in ensuring hassle free and affordable immigration processes, road and air travel.

8. **Creating a favourable business and investment climate.** In addition to road and air access limitations, various gaps in attractions and facilities prevent Zambia from fully capitalising on and appealing to lucrative target market segments. Such gaps include visitor amenities, accommodation, transport, catering, entertainment and other services. Proactive measures will be put in place to encourage investment in such facilities and services.
9. **Raising demand for destination Zambia.** Zambia has made good inroads among the international travel trade serving Africa, as a packaged high-end safari destination and an extension option for touching on the Victoria Falls as part of a Southern Africa tour package. However, Zambia is largely unknown among consumers as an end-destination for varied, affordable nature and culture experiences. Success will largely depend on effective and well-resourced consumer marketing efforts, especially in core markets such as UK, Europe and USA.
10. **Strengthening the management of the sector.** The ambitious vision for tourism will require a substantially increased tourism budget allocation, strengthening of public sector skills and capacity for managing tourism resources at both national and local levels, improved public-private partnerships in promoting and developing tourism and more effective progress monitoring and mitigation.

### 3.4 Future growth direction summarised

Figure 3.15: Growth strategy summarised



## Chapter 4: Spatial structure plan

12 zones were identified in Report 1: Situation Analysis, July 2017, as potential tourism development areas. These were visited during field visits and consultations were held with stakeholders. A series of maps were presented, highlighting graphically, at a high level, the opportunities and constraints of each area.

Based on the identified tourism opportunities and constraints, a Tourism Planning Framework is proposed that builds on the strengths of the nature and cultural heritage product by clustering development around the major resources of the country. The intention is to have a series of differentiated products according to Zambia's character, development and type of experience.

The issue here is one of determining which touristic attractive areas or groups of contiguous areas should be designated Tourism Development Areas (TDAs) for planning purposes. In determining these TDAs, the following factors were taken into consideration:

- Location of the NPs, GMAs, conservation areas, etc.
- Topography of the area or areas, taking into account natural boundaries, etc.
- Quality, preservation status and uniqueness of natural and cultural resources.
- Natural and man-made tourist attractions and their spatial relationships.
- Range of tourism products that could be developed.
- The existing volume and quality of superstructure of hotels, lodges, camps, etc.
- The logic of their geographical grouping or 'clustering', enabling them to be accessed and serviced from a common centre.
- Access in respect of time, distance and cost from the main 'gateways'.
- The existing and planned level of infrastructure, particularly roads and utilities.
- The potential to create a composite product for marketing and image building purposes.

These attributes were mapped and through a process of 'map overlaying', the following ten TDAs were identified for further development.

Lusaka – core area and Lusaka NP.  
Siavonga – town and waterfront.  
Kafue Flats – Lochinvar NP, Blue Lagoon NP and surrounds.  
Livingstone – town, Victoria Falls and Mosi-oa-Tunya NP.  
Kafue – Kafue NP and surrounding area.  
Lower Zambezi – Lower Zambezi NP and surrounding area.  
Luangwa Valley – South Luangwa NP, North Luangwa NP and surrounding area.  
Samfya - waterfront and peninsula.  
Kasaba Bay – the bay and Tanganyika lake shore  
Ndola/Copperbelt – town and surrounds

In the longer term, four further TDAs can be developed:

North TDA – expansion of Kasaba Bay TDA, Nsumbu NP, Mweru Wantipa NP, Lusenga NP, lakes and waterfalls.  
Bangweulu TDA – Kasanka NP, Lavushi-Manda NP, Isangano NP, heritage sites  
North West TDA – West Lunga NP and surrounding forest areas.  
The West TDA – Sioma Ngwezi NP, Liuwa NP, West Zambezi GMA.

The importance of having designated TDAs is that they:

- Help create critical mass – making it viable to provide a range of facilities and services in the area.
- Provide value by creating a whole greater than the sum of the parts.

- Diversify the product offer in a way that can be promoted to different market segments, thereby facilitating product branding.
- Allow different forms of tourism development to co-exist – designating particular areas for exclusive nature tourism only, other areas for more intensive use.
- Provide the opportunity to design an environment that will ensure compatible and complementary land uses.

An important element of the Tourism Planning Framework is the anchoring and linking of the TDAs by developing products that effectively integrate sites, attractions, events, activities and associated accommodation. To give effect to this, the Plan includes the development of tourism corridors and circuits with appropriate signage, and interpretative information and linkages. As indicated above these are:

- The Kafue Flats ecotourism circuit – linking Livingstone, Kafue NP and Lochinvar NP.
- The western KAZA tourism circuit – linking Livingstone, Sioma Ngwezi NP, Ngonye Falls and surrounding area.
- Bangweulu adventure and heritage tourism circuit – linking Lavushi-Manda NP, Kasanka NP, Bangweulu GMA and surrounding heritage sites.
- The Northern community heritage corridor – linking the source of Zambezi, Ndola and the north.
- Northern Lakes and waterfall tourism circuit – linking Mbala, Lake Tanganyika, Nsumbu NP, Mweru Wantipa NP, Lusenga NP and surrounding lakes and waterfalls

The overall concept therefore is:

- A product development approach based on the creation of a ‘hub and spoke’ with Livingstone, Kafue, Lusaka and Mfuwe as the four main hubs.
- The development of a number of Tourism Destination Areas with ‘flagship’ visitor attractions which will strengthen the tourism offer, reinforce the identity of Zambia, and serve as a magnet in attracting visitors to the country.
- The creation of tourism routes (the spokes) that provide linkages between the four main hubs and other destination areas.

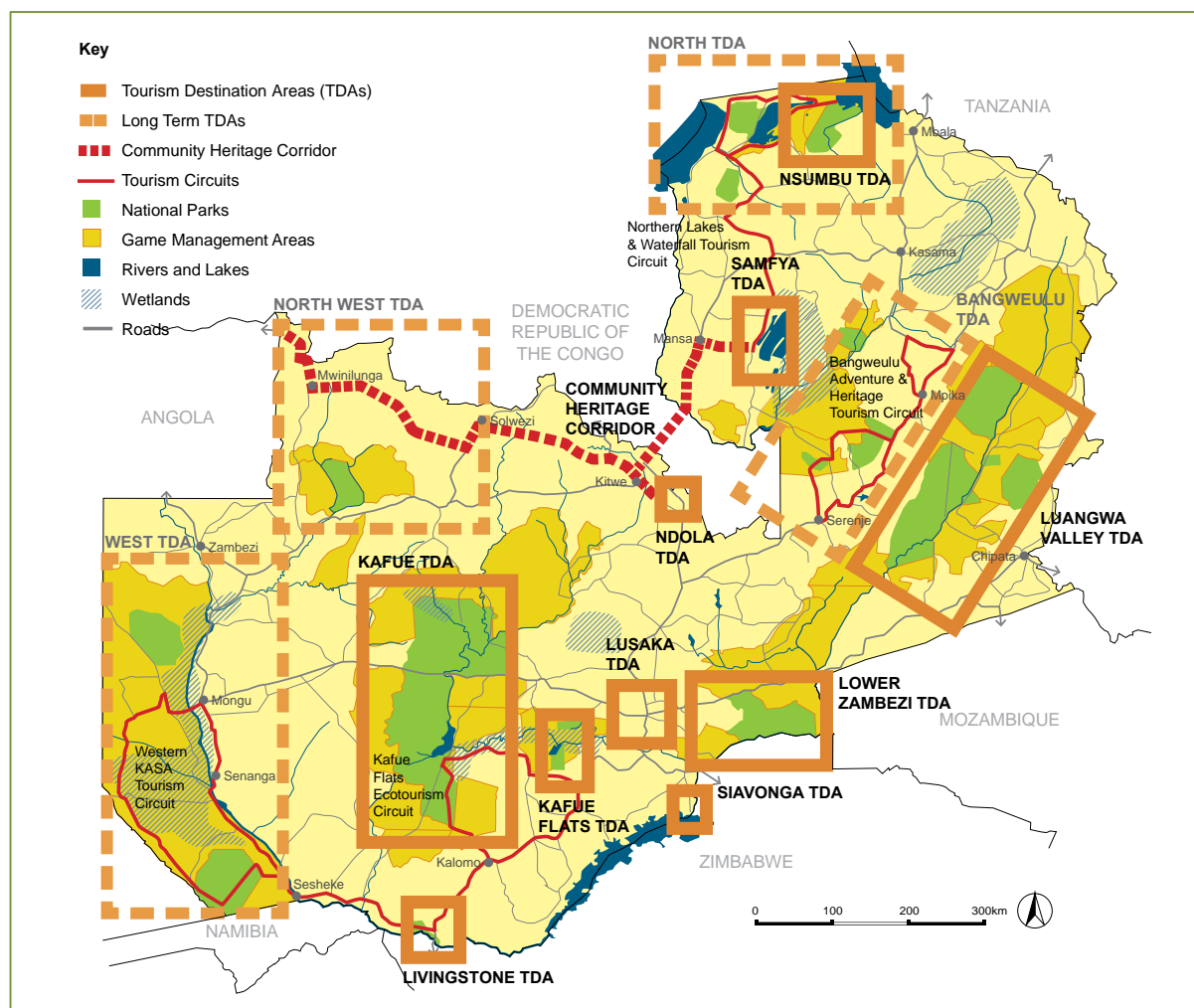
The intention in the south and east of the country is to further develop the nature, heritage and community based tourism product in and around the Kafue and Luangwa Valley National Parks and within Livingstone in a more intensive and commercial manner, offering an ‘experience’, but not compromising the integrity of the resource.

Lusaka will be promoted as a regional conference centre with supporting nature and heritage products as part of an urban regeneration programme, while at Siavonga and within the wetlands of Kafue Flats, the focus will be on the domestic market with affordable accommodation and recreational activities in a tranquil and waterfront setting. Lower Zambezi will continue to be presented as the ‘jewel of the Zambezi’.

In the north and west of the country, tourism will occur at a slower pace until access is much improved. Emphasis will be placed on community development providing opportunities to engage and benefit from tourism, maximising the true tourism development potential that these outer areas of Zambia have.

This development concept has been elaborated into a tourism structure plan presented in Figure 4.16 below – a physical representation identifying the spatial arrangement of tourism development and its relationship with the country’s infrastructure, including the various TDAs.

Figure 4.16: Tourism Structure Plan



The 10 TDAs are described further in Chapter 6. The level of planning presents the tourism opportunities for each area and provides the basis for the improvement and orderly expansion of tourism in order to increase employment and economic benefits derived from the sector. Projects have been identified for implementation as part of proposed Tourism Action Areas (TAAs).

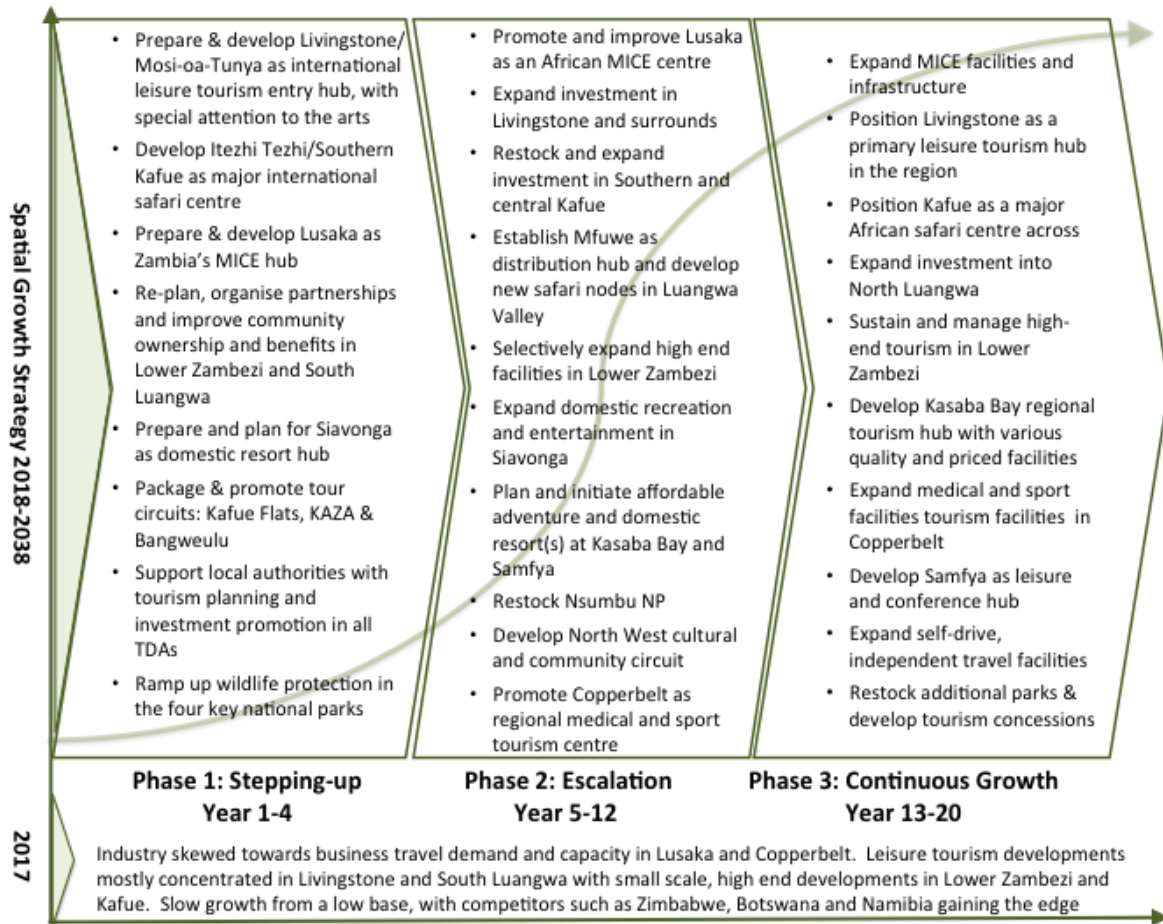
Given that Zambia is in the early stages of tourism development and considering the limited resources and capacity available for infrastructural investment and promotion, it will be crucial to implement the structure plan in a phased and logical manner.

As indicated in Figure 4.17 below development will be spatially managed in three phases, namely:

- *Phase 1 Stepping-up (Years 1-6):* Preparing the ground and initiating a portfolio of tourism developments in TDAs that offer short-term expansion opportunities for ensuring a “step-change” in tourism arrivals. During this phase marketing will focus on attracting visitors mainly to take up existing spare capacity. Growth in tourism arrivals is expected to rise, albeit at a moderate rate while new investments in infrastructure and facilities are being constructed and various growth barriers are being addressed.
- *Phase 2 Escalation (Years 7-12):* Capitalising on the investments and expansions made during Phase 1, when these will come on stream and other aspects of the plan (e.g. improved air and road access, promotion, training, etc.) have been addressed. Rapid growth and investment expansion is expected during this phase.

- *Phase 3 Continuous growth:* (Years 13-20): Continuing the growth momentum achieved during Phases 1 and 2, when tourism should be well-stabilised and the main tourism areas should provide a range of core attractions to attract a variety of market segments. Zambia will be positioned as a leading African MICE and leisure tourism destination. While the growth in arrivals is expected to stabilise Zambia is expected to continue outperforming other destinations in the sub-region.

Figure 4.17: Spatial phasing of TDAs



The successful development of the TDAs will largely depend on the expansion of the domestic air network in Zambia. Figures 4.18 and 4.19 below provide an indication of proposed air network expansion.

During Phase 1, a progression of the current focused “hub-and-spoke” system will be feasible, using Livingstone, Lusaka and Mfuwe as major leisure tourism distribution hubs. The most important intervention proposed for Phase 1 is the establishment of a regular air service from Livingstone and Lusaka to Itezhi Tezhi in Kafue, given the proposal for the development of Itezhi Tezhi and Kafue NP as a major safari resort node.

During Phase 2 and beyond new domestic air routes and distribution points will be established linking Kasama (servicing the North), Mansa (servicing Samfya and Luapula), and Mongu (servicing the West) into the tourism air network.



Figure 4.18: Tourism Structure Plan with Phase 1 air linkages

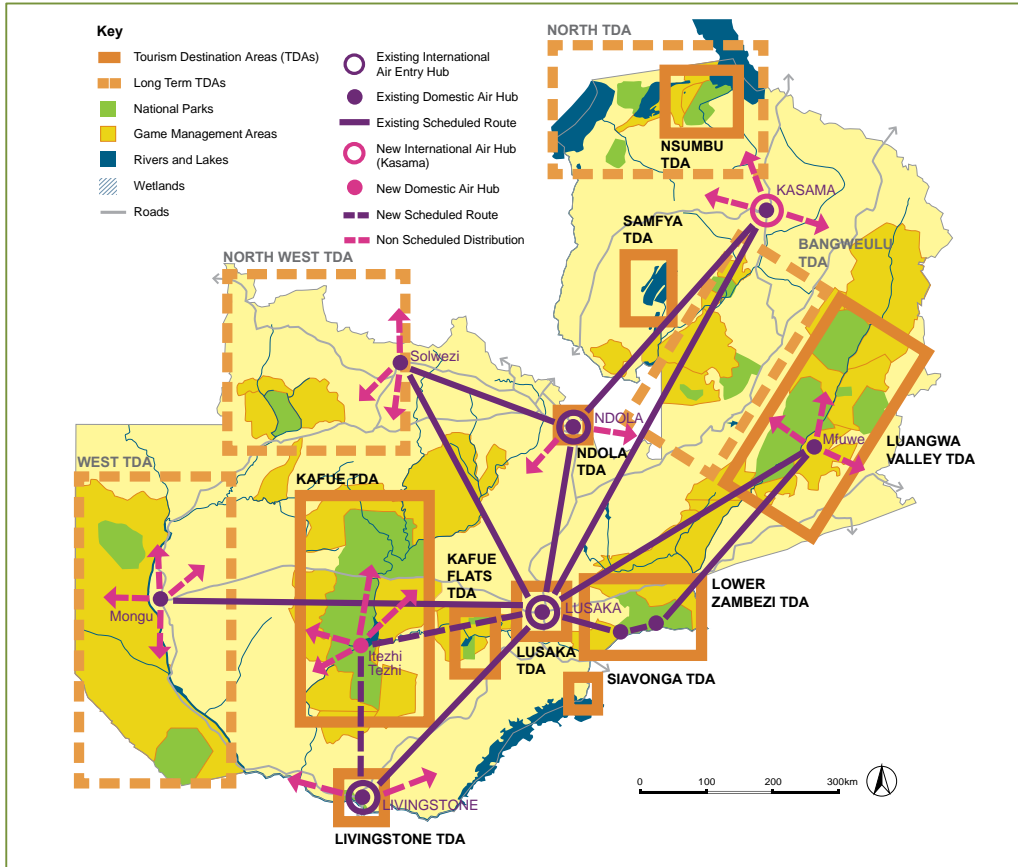
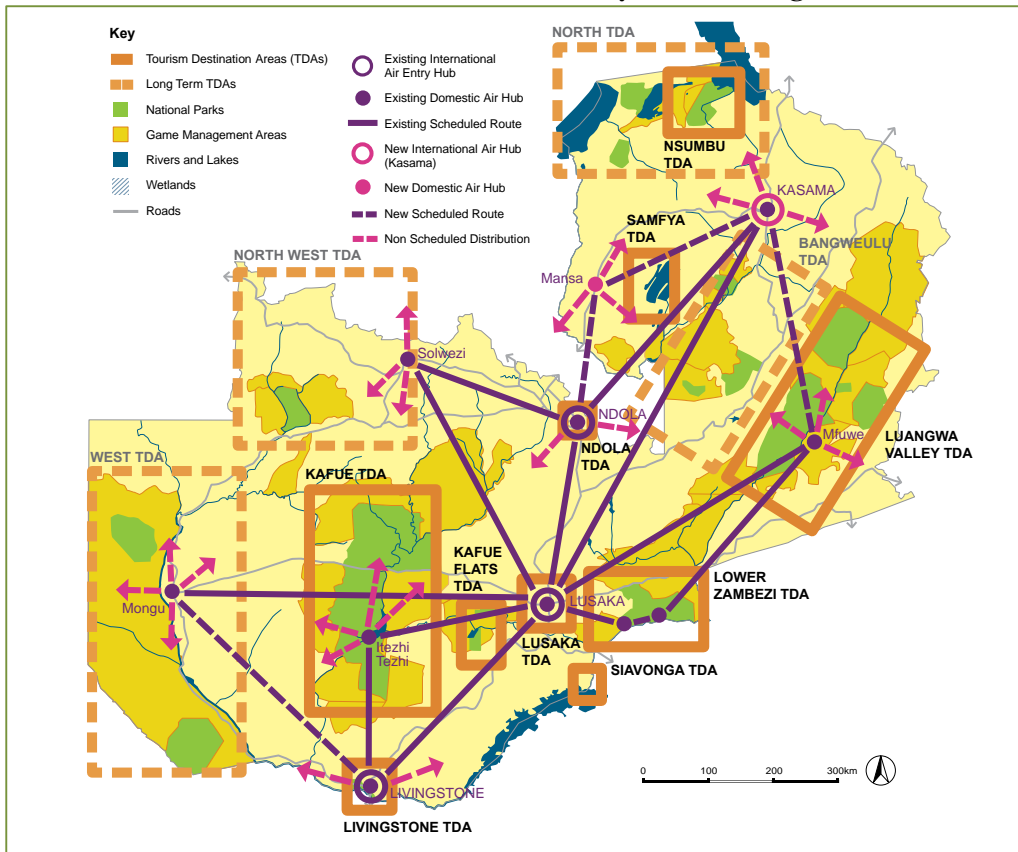


Figure 4.19: Tourism Structure Plan with Phase 2 and beyond air linkages



The planned development trajectory for the various TDAs is as follows:

**Table 4. 7:Planned Development Trajectory for TDAs**

	<b>Phase 1: Stepping-up</b>	<b>Phase2: Escalation</b>	<b>Phase 3: Continuous Growth</b>
<b>Lusaka</b>	Prepare and develop Lusaka as Zambia’s MICE hub	Promote and improve Lusaka as a Southern Africa MICE centre of choice	Expand MICE facilities and infrastructure as the market grows
<b>Livingstone</b>	Prepare and develop Livingstone as Zambia’s international tourism entry hub; expand facilities in and around the Victoria Falls and improve town ambience	Expand further large-scale tourism investment in and around Vic Falls, Mosi-oa-Tunya NP and Livingstone town	Develop Livingstone as a major African regional tourism hub
<b>Kafue</b>	Develop Lake Itzhi Tezhi as larger scale international safari centre and resort hub, linked by air and road to Livingstone and Lusaka	Develop the Kafue River waterfront as international medium-scale safari lodge area & expand large scale investment in southern Kafue	Restock depleted areas and develop Kafue as a major African safari centre, offering a range of price points
<b>Luangwa Valley</b>	Finalise planning, build public-private-community partnerships, enhance law-enforcement and community ownership	Establish Mfuwe as distribution hub for safari nodes in south and north of South Luangwa	Expand investment into North Luangwa NP
<b>Lower Zambezi</b>	Finalise planning, build public-private-community partnerships, enhance law-enforcement and community ownership	Selectively expand high-end facilities in Park and GMA	Continue sustainable and community-based management practices
<b>Bangweulu</b>	Capacity building and tourism planning support of Samfya local authority. Package and promote Bangweulu adventure and heritage tourism circuit	Plan and initiate resorts at Samfya; promote Bangweulu circuit and improve facilities	Promote major investment in Samfya; expand facilities and services along circuit
<b>Siavonga</b>	Plan as a domestic resort hub; capacity building and planning support of local authorities	Facilitate development of domestic entertainment and relaxation facilities	Expand investment in large scale resort development
<b>North</b>	Restock Nsumbu NP; capacity building and tourism planning support of local authorities	Plan and initiate resorts at Kasaba Bay; promote a northern lakes and waterfall tourism circuit and improve facilities	Develop Kasaba Bay as major regional tourism hub; restock additional parks;
<b>Kafue Flats</b>	Develop and package Kafue Flats ecotourism circuit	Promote circuit internationally and improve facilities	Expand facilities and services along circuit
<b>Copperbelt</b>	Capacity building and tourism planning support of local authorities	Package and promote a community heritage tourism corridor and medical and sport tourism centred on Ndola	Promote corridor and facilitate larger scale development of sport and medical facilities
<b>West</b>	Develop and package Western KAZA tourism circuit	Promote circuit and improve facilities	Expand facilities and services along circuit
<b>North West</b>	Capacity building and tourism planning support of local authorities	Develop and package a community heritage tourism corridor	Promote corridor and improve facilities

## Chapter 5: Growth strategies and actions

The Situation Analysis report<sup>23</sup> that was compiled as a first step in the master planning exercise identified around 60 key success factors that needed to be addressed under the five strategic goals, for achieving the growth objectives stated in Chapter 3. The following section sets out the strategies and actions for addressing each of the strategic goals.

### 5.1 Goal 1: Develop innovative tourism products and attractions

While Zambia should not move away from developing and promoting its wildlife and nature resources, it can add significant additional dimensions to the tourism product through its cultural heritage resources. The country has unique cultural heritage resources dating back several centuries that can readily be interpreted and packaged to attract visitors. In addition, the local communities and the people of Zambia offer excellent experiences. The following strategies and actions will be implemented to develop

#### 5.1.1 Implementing Tourism Action Areas in identified TDAs

Each of the Tourism Development Areas will be further elaborated in specific Area Development Plans, as a separate report volume to this ZTMP. The following Tourism Action Areas (TAAs) provide a summary of significant opportunities to develop tourism in each of the TDAs in the Phase 1 “Stepping Up” years of the structure plan.

Actions:

- ☞ *Prepare and develop Lusaka as Zambia’s MICE hub:* For it to become a desirable MICE destination the city is in need of urban regeneration tackling issues such as urban sprawl, traffic congestion and lack of tourism product. In support of tourism development, four TAAs are proposed:
  - Lusaka Visitor Information Programme - visitor information centre, discovery route, heritage trail, ecotourism and agro-tourism zones, visitor interpretation signs, visitor map.
  - Kabwata Cultural and Arts Village - a community based tourism development focusing on rehabilitation of the site to include new performance area and arts development hub.
  - Lusaka NP – improved park roads and trails, a central educational centre and wildlife sanctuary, camping sites and picnic stops.
  - Lusaka Urban Design Strategy – townscape improvements in the context of a long-term urban regeneration strategy.
  
- ☞ *Develop Livingstone as Zambia’s international tourism entry hub:* Livingstone town currently lacks a clear identity. The challenge will be to draw visitors to the town (and beyond), get them to stay longer and spend more. Six TAAs are proposed:
  - Livingstone Visitor Information Programme - visitor information centre, discovery route, heritage trail, ecotourism and agro-tourism zones, visitor signs/interpretation panels, visitor map.
  - Livingstone Town Centre Urban Design Strategy - to include road, car parking, pedestrian and public open space improvements.
  - Mosi-oa-Tunya/Victoria Falls NP - improved trails, look out facilities and interpretation.
  - Livingstone Hillside Resort – identification of site for flagship integrated development.
  - Livingstone Cultural Village - a community based tourism development focusing on rehabilitation of existing site.
  - Livingstone Community Development Programme - to establish projects and increase community ownership and management of tourism sites, with special emphasis on

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<sup>23</sup> Zambia Tourism Master Plan Volume 1: Situation Analysis

development of the arts.

- ☞ *Develop Kafue NP and Lake Itezhi Tezhi as larger scale international safari centre and resort hub:* The park provides a quality wildlife/wilderness experience, but is currently underutilised with low density of wildlife. The park therefore needs to be zoned and themed for a variety of low to high-density development. Four TAAs are proposed:
  - Kafue NP infrastructure improvement- improved park roads/circuits and signage and identification of sites.
  - Itezhi Tezhi Lakeside Resort – integrated phased flagship development to accommodate up 500 rooms.
  - Chunga Tourism Resort - integrated phased development to accommodate up 200 rooms.
  - Itezhi Tezhi Community Development Programme - to establish projects necessary to ensure the sustainable use and conservation of the surrounding GMAs.
  
- ☞ *Strengthen and expand tourism in Luangwa Valley:* South Luangwa is renowned for its large concentration of wildlife viewing. Opportunities exist to increase development if carefully planned. Both parks therefore need to be zoned and themed for a variety of low to high-density development. Three TAAs are proposed:
  - South Luangwa NP infrastructure improvement - improved park roads to open up new development sites in the undeveloped southern and northern sections of the park.
  - North Luangwa NP infrastructure improvement - improved park roads/circuits and identification of sites.
  - South Luangwa NP expansion programme - Lupande GMA and Munyamadzi GMA Community Development Programmes - planning/clustering village development, creation of wildlife corridors and establishing projects necessary to ensure the sustainable use and conservation of the GMA.
  
- ☞ *Ensure sustainable tourism development in Lower Zambezi:* Opportunities for further development are limited within the park. Consolidation of sites within the GMA is required. Two TAAs are proposed:
  - *Lower Zambezi NP* - improved park roads/circuits to include new access road along the base of the escarpment.
  - *Chiawa GMA Community Development Programme* - planning/clustering village development, creation of wildlife corridors and establishing projects necessary to ensure the sustainable use and conservation of the GMA.
  
- ☞ *Package and promote Samfya and Bangweulu:* Samfya is recognised for its beaches and birding but with limited wildlife. The town also attracts the government/NGO conference market. Opportunities also exist to link various tourism sites in and around Bangweulu wetland. Two TAAs are proposed for Samfya together with the establishment of an adventure and heritage tourism circuit:
  - *Samfya Corniche* – improvements to the public realm and beach environment.
  - *Sport zone* – development of high quality sport facilities to position the area as a sport tourism hub
  - *Samfya Peninsula Beach Park* – designation as a wildlife reserve to include camping sites and picnic/look out areas.
  - *Bangweulu Adventure and Heritage Tourism Circuit* - improve roadside facilities, signage and park trails linking Lavushi-Manda NP, Kasanka NP, Bangweulu GMA and surrounding heritage sites.
  
- ☞ *Strengthen Siavonga as a domestic resort hub:* There are undeveloped waterfront sites, limited public access to the lake, poor public realm and no interpretation of the lake or dam. Four TAAs are proposed:

- *Siavonga Urban Design Strategy* – to include road, car parking, pedestrian and public open space improvements.
  - *Siavonga Waterfront Plaza* – public open space to accommodate events and local market/fish fry.
  - *Siavonga Sport and Watersports Centre* – identification of site to accommodate purpose built sport centre and associated marina.
  - *Siavonga Visitor Information Programme* - visitor information centre, nature trails, visitor signs/map.
- ☞ *Strengthen and expand tourism in Nsumbu and the North:* Lake Tanganyika is an iconic feature of Africa but remoteness is the area’s main constraint with limited wildlife. The lakeshore needs to be positioned as a ‘getaway from it all’ destination with emphasis on sports, health and wellness. Three TAAs are proposed together with the establishment of a lakes and waterfall tourism circuit.
- *Nsumbu NP* - improved park roads/circuits and identification of waterfront sites.
  - *Nsumbu Community Development Programme* - to establish projects necessary to ensure the sustainable use and conservation of the park and GMA.
  - *Kasaba Bay Tourism Resort* – phased beach development to accommodate up to 100 rooms.
  - *Northern Lakes and Waterfall Tourism Circuit* – special programme to develop heritage sites, improve roadside facilities, signage and park trails linking Samfya, NP’s, lakes and Kasaba Bay.
- ☞ *Improve tourism packaging and capacity in the Copperbelt:* Ndola and surrounding towns are mining communities with supporting businesses and government entities but with limited tourism product. The area is in the far north of the country and far away from the major tourism anchors of the country. But has good domestic tourism potential.

In addition, a community heritage tourism corridor is proposed to promote the individual tourism sites in the Copperbelt. It will be the ‘sum of the parts’ that will make the north west of interest – an undiscovered domestic and international travel circuit. The following TAAs will help promote the town and surrounding tourism sites.

- *Ndola Visitor Information Programme* - visitor information centre, discovery route, visitor signs/interpretation panels, visitor map.
  - *The Community Heritage Corridor* - develop and promote the nature and cultural heritage tourism sites along the route between the source of Zambezi, Solwezi, Ndola and Samfya, including the bird sanctuary, community performances, etc.
  - *Mining tourism development* – work with mining companies to provide opportunities for visitors to explore the mining industry, e.g. to go down a mine shaft, see how minerals are mined and processed, etc.
- ☞ *Develop and package Kafue Flats tourism offer:* Currently the area suffers from poor road access with limited game viewing. Poaching and over fishing are major challenges. Three TAAs are proposed together with the establishment of an ecotourism circuit:
- *Lochinvar NP improvement* – improved park roads/circuits, bird hides, boardwalks and signage/interpretation, and possible identification of long term lodge development site.
  - *Kafue Flats GMA Community Development Programme* – to establish projects necessary to ensure the sustainable use and conservation of the GMA and wetlands.
  - *The Kafue Flats Ecotourism Circuit* - improve roadside facilities and signage linking Livingstone, Kafue NP and Lochinvar NP.
- ☞ *Develop and package Western KAZA tourism circuit:*
- *The Western KAZA Tourism Circuit* - improve roadside facilities, signage and park trails linking Livingstone, Sioma Ngwezi NP, Ngonye Falls and surrounding area.

- ☞ Support the planning process for developing longer term TDAs, by preparing development frameworks for:
  - Bangweulu TDA
  - North TDA
  - North West TDA
  - West TDA

### 5.1.2 Developing overland touring circuits

In support of Zambia’s competitive positioning and in line with the rapid movement towards independent travel, various tour routes/circuits will be developed and promoted to the travel trade and consumers. The routes should be clearly branded in support of the national brand.

The structure plan proposed the development and promotion of the following tour circuits, namely: the Bangweulu Adventure and Heritage Tourism Circuit, the Northern Lakes Waterfalls and Lakes Circuit, the Copperbelt Community Heritage Corridor, the Kafue Flats Wetland Tourism Circuit, and the Western Kaza Tourism Circuit.

#### Action

- ☞ *Identify and develop viable tourism circuits using a participative process:* Establishing viable and sustainable tourism routes will require detailed planning. Most importantly, tourism circuits will only be sustainable if they offer a combination of attractions, experiences, activities, facilities and services. The following participative action process will be adopted in this regard:
  - Agree conceptual route and circuit locations
  - Establish route forums and conduct audits
  - Map out routes
  - Develop and display a suitable system of route signage
  - Actively promote the routes and circuits
  - Continuously develop and improve products and attractions

### 5.1.3 Advancing cultural tourism

While Zambia’s attractiveness as a destination has traditionally been and will continue to be rooted in the wildlife and safari experience, the position of “Custodian of the Zambezi” covers all aspects of life around the Zambezi, including the cultural traditions and living heritage of Zambians. The combination of authentic nature, wildlife and Zambian cultural traditions and hospitality could potentially provide a powerful proposition for keeping visitors longer in Zambia. The following actions are proposed to strengthen the cultural tourism product offer:

- ☞ *Review and adapt the concept of government-operated cultural villages:* The majority of government-initiated cultural villages in Zambia are either non-functional or in neglected condition. Government-run tourism enterprises often struggle to be financially viable, mainly due to limited market access and not being integrated in the private value chain in terms of product development, operations, marketing, distribution channels, etc. As a result the operational quality, operating hours, programme content and other aspects of such initiatives often do not fit with the expectations of private operators. MoTA will conduct feasibility studies of the various cultural villages and engage in discussions with private tourism operators to discuss and implement viable public-private partnerships in developing and operating cultural villages.
- ☞ *Identify and support a few viable community cultural tourism initiatives as success models of cultural tourism development:* The viability of community cultural initiatives depend on a variety of factors including location, visitors access, consistency and quality of offer, fit with visitor schedules and programmes, etc. MoTA will identify potential community cultural tourism experiences

(including traditional ceremonies, dance acts, village visits, handicraft projects, etc.) and evaluate these with regard to their potential viability. Three to five such initiatives will be selected for financial and technical support, as pilot cultural tourism projects.

- ☞ *Establish a community cultural and arts tourism support programme:* MoTA and its agencies will develop a structured support programme for assisting community entrepreneurs in developing and offering cultural tourism experiences and developing the arts (visual art, music and dance, theatre, etc.). Support could include special funding allocations to improve facilities for the arts, marketing assistance, distribution and booking services, technical advice on quality and content and training or entrepreneurs.
- ☞ *Improve the quality and relevance of museums in tourism areas:* Museums could be important tourism attractions if they offer a unique and quality experience. The museums in Lusaka, Livingstone and Choma are particularly well located on the tourism circuit and all of these are in need of refreshment and refurbishment. MoTA will conduct an audit of these museums and identify, together with the museum curator's priority improvements that will improve the attractiveness of the museums and launch improvement programmes in this regard.

### 5.1.4 Restocking national parks and conservation areas

Zambia's 20 national parks is its biggest tourism asset for driving future tourism expansion. Sadly, wildlife has been decimated in many of the parks and wildlife number and species in others are under severe threat. Innovative methods for restocking parks such as Nsumbu, Lusenga Plains, Southern Kafue and others will be considered. Actions in this regard could include:

Actions:

- ☞ *Launch a restocking programme for Southern Kafue:* Phase 1 of the Structure Plan includes the development of a larger scale safari resort around Lake Itezhi Tezhi. The main goal of this development is to provide the middle-market of international visitors with a more affordable, easy to reach safari offer in Zambia. Once the Kalomo-Itezhi Tezhi-Dundumwezi-Namwala road has been completed Zambia's leisure tourism hub, Livingstone will be within easy reach of Kafue NP. The majority of middle-market visitors will want a game-rich experience with good sightings of most of the big-5 and wildlife numbers in southern Kafue will be increased for this purpose. The possibility of fencing in a section of Kafue NP around the lake for securing the animals until numbers have reached sufficient capacity will be investigated.
- ☞ *Lease out depleted parks and game management areas for game ranching on restock-operate-transfer basis:* Parks like Lusenga Plains, West Lunga, Luambe and others are largely depleted of wildlife. If restocked they could potentially become major catalysts for spreading tourism around Zambia. The same goes for some of the GMAs surrounding national parks. A model to consider is to lease out these parks and GMAs (or parts thereof) for game ranching to private investors on longer-term leases. This will allow investors to fence in the parks, restock them, conduct protection and anti-poaching services and recuperate their investments through wildlife ranching. Once the lease expires and the area is sufficiently stocked the parks will get handed back to the government for further management and operation. The Buby Valley Conservancy in Zimbabwe provides an example of a restored wildlife conservancy (<https://www.bubyvalleyconservation.com/>)
- ☞ *Further expand collaboration with local and international conservation partners:* Zambia has some of the best examples of cooperative conservation through partnership between DNPW and organisations like Frankfurt Zoological Society (FZS), African Parks, Kasanka Trust, Conservation Lake Tangayika (CLT), Conservation Lower Zambezi (CLZ), Conservation South Luangwa (CSL) and others. Such relationships should be expanded to other parks.

## 5.2 Goal 2: To provide easy and affordable tourist access

Based on the challenges and opportunities identified in the situation analysis five strategies will be followed in achieving this goal, i.e.

- Improve flight linkages from key international markets
- Capitalise on growth in foreign air supply in the broader region
- Reduce costs of domestic air travel
- Ease immigration conditions for key markets
- Improve road linkages to and in key attractions

### 5.2.1 Improving flight linkages from key international markets

The recent withdrawal of British Airways and KLM services to Lusaka has removed direct air access from Europe to Zambia requiring visitors from key markets on this continent to travel principally via Dubai, Johannesburg and Nairobi, introducing inconvenience and lengthier journey times. At the same time, the continuing expansion of Dubai as a major international air hub in parallel with the growth of Emirates Airline is now being followed ambitiously, although on a smaller scale, by Abu Dhabi and Qatar in the Gulf and Turkey, in both airport and national airline expansion. These factors represent important opportunities for improving international air access and should be addressed by:

Actions:

- ☞ *Launch an air access support programme:* An air access task team will be created comprising of Zambia Airports Corporation Limited, Zambia Civil Aviation Authority, Zambia Revenue Services, MOTTA, the ZTA and private sector travel industry representatives, to re-examine the circumstances behind the withdrawal of BA and KLM and re-enter discussions with the airlines to attract them to return. A package of incentives associated with the removal/reduction of landing charges, fuel surcharges, air passenger charges, airport development charges etc. should be considered for an initial five year period and this would be supported by joint marketing initiatives and promotions in the UK and Ireland, France, The Netherlands and other appropriate markets co-funded by ZTA with private sector industry participation and support.
- ☞ *Canvass foreign and local airlines to provide international flights from Europe directly to Zambia and build airline partnerships:* Direct flights from Europe to Zambia are much needed and a special strategy is required in this regard, working closely with both local and foreign airlines. This same task team should also pro-actively engage with major international airlines not presently flying to Zambia, including Turkish Airlines, Etihad and Qatar Airlines in particular, to identify any barriers they may consider to exist for their entry and to develop suitable mitigation measures as necessary.

### 5.2.2 Capitalising on growth in foreign air supply in the broader region

Both Zambia and Zimbabwe have recently invested heavily in airport improvements at Livingstone and Victoria Falls. Zimbabwe is re-building its airport runway and terminal facilities at Victoria Falls to enable it to receive wide-bodied jets and handle the expansion in visitor arrivals this implies. This investment is also designed to establish Victoria Falls as an air-hub in its own right providing a gateway for direct air access, facilitating growth in the number of long-haul carriers and visitors arriving into this central African region. Such growth will no doubt also impact positively on the distribution of visitors to neighbouring countries and this represents an important opportunity for the development of tourism in Zambia requiring:

Actions:

- ☞ *Set up Zambian immigration facilities at Victoria Falls:* The Zambian Department of Immigration and Ministry of Home Affairs to work with their counterparts in the Zimbabwean Government to establish a Zambian border control and entry/exit point within Victoria Falls airport (similar to



the arrangements that exist at St Pancras International station in London and at Gare Du Nord station in Paris, for the smooth handling of passengers travelling on the Eurostar rail link between those cities) to efficiently process visitors travelling directly onwards to Zambia.

- ☞ *Facilitate distribution of visitors from international air hubs to tourism growth points:* The proposed air access task team to agree a programme of airline support to help establish and sustain air connectivity between the Livingstone, Lusaka and Victoria Falls air-hubs and key tourism growth points such as Kafue National Park/Itezhi-Tezhi, Luangwa Valley and other selected TDAs. Such airline support programme could include waving or discounting landing charges, fuel surcharges, air passenger charges, airport development charges etc. but may also include financial assistance during the route start-up phases to support a break- even position for the route during the first few years of operation. Such assistance would diminish as passenger volumes grew.

### 5.2.3 Reducing costs of domestic air travel

Scheduled and charter domestic air travel is expensive and limited compared with other regional destinations and is dominated by Proflight, with a new scheduled airline called Mahogany having just started operations between Lusaka and Ndola with plans to expand its route network in due course. Lack of competition is not the only factor affecting the price of air travel, with seasonality of demand, relatively low passenger volumes and high aviation charges all contributing. Aviation charges and operational issues need to be addressed thus:

Actions:

- ☞ *Reduce relevant air operational charges on domestic scheduled and charter routes:* A revised structure of airport charges should be introduced such that landing charges, aircraft parking fees, air passenger charges, security charges, passenger safety charges, air traffic and navigation charges, runway registration charges, fuel surcharges etc. should be brought in line with regional norms
- ☞ *Improve fuel supply at selected smaller airfields:* The charter sector encounters difficulties in serving many smaller airfields because infrastructure for holding supplies of aviation fuel for re-fuelling are either not available or their levels of supply are not regularly maintained and this compromises visitor access and route development. The Zambia Civil Aviation Authority in association with the appropriate provincial and local government departments must review and improve the storage capacity and fuel supply lines at popular tourism airstrips.
- ☞ *Strengthen communication and partnerships between authorities and air operators:* The Zambia Civil Aviation Authority, Zambia Airports Corporation Limited and the Zambia Revenue Authority will communicate timeously new and/or higher charges in the aviation sector and the reasoning behind such changes, since rapid fee increases and the absence of certainty in such operational matters affects business viability, erodes business confidence and ultimately can affect investment decision-making.

### 5.2.4 Easing immigration conditions for key markets

The presence and pricing of tourist visas can be a determining factor for visitors when they choose where to take their holiday, especially since many visitors to the region are on a multi-destination trip. Destinations such as South Africa and Botswana recognise this with their policy of visa free access for visitors from key source markets. Equally important is visitor management and facilitation at border posts and the following recommendations are made in respect of both of these factors:

Actions:

- ☞ *Remove or reduce visa requirements for key tourism source markets:* Zambia to remove the tourist visa requirements and charges for those non-SADC (SADC country nationals are not subject to the tourist visa charge) target sources markets identified in Section 5.4.2 below in this report.

- ☞ *Remove or reduce tourist vehicle overland entry charges and simplify procedures:* As is indicated in Section 3.3.2 the “Intrepid Explorer” segments (over landers, backpackers, etc.) is a potential lucrative market segments that could play a major role in opening up new tourism destinations in Zambia. To encourage this market, Zambia will reduce the existing Vehicle Entry charge of \$30, levied on all vehicles driven by tourists arriving independently to tour Zambia. This new rate should place the Zambian charge in much closer conformity with those used by Botswana, Namibia and Zimbabwe. Cross border vehicle entry procedures will be assessed and simplified where possible to make it as easy as possible to enter Zambia with leisure tourism vehicles.
- ☞ *Improve tourist reception facilities at border posts:* Immigration and border facilitation arrangements are inadequate for tourist visitors at several major entry points with poor demarcation between tourist arrival classifications, and between tourists and truck drivers, resulting in confusion and sometimes lengthy queuing. The new terminal buildings constructed at Lusaka and Livingstone airports will largely overcome such difficulties there, but at land border crossings such as Victoria Falls and Kazungula there is a need for better management and separation of visitor arrivals and improved visitor facilitation in terms of tourism information, currency exchange, toilet facilities and road signage.
- ☞ *Instil a tourism-friendly culture at border posts:* MOTTA to develop and deliver a training programme for the Department of Immigration border officials who would sensitise these staff members to the value of their role in welcoming visitors, customer relations, and collecting visitor data.

## 5.2.5 Improving road linkages to and in key attractions

As indicated in Chapter 2 Zambia has a well-developed road network but it has suffered from a lack of attention to maintenance and there are gaps in connectivity with international neighbours and within the nations own provinces. These shortcomings have an impact upon the tourism sector where poor quality roads leading to tourism sites, locations of interest and National Parks constrain visitor access, tourism investment and development. Poor road and track maintenance within National Parks constrains their ability to operate optimally or extend the season.

As indicated the Road Development Agency (RDA) has a Road Maintenance Strategy and the longstanding Link Zambia 8000 Programme that is building connectivity across the nation and with neighbouring countries but tourism tends to be seen as a long term beneficiary in such programmes. The following actions would better serve the road linkage and maintenance needs of the tourism sector:

Actions:

- ☞ *Include planning, development and maintenance of road in national Parks under the mandate of RDA:* The inadequate budgets of the DNPW and the individual parks themselves provides little funding for their principal concerns of wildlife conservation, management and anti-poaching never mind funding road maintenance activities and the purchase and repair of related equipment. Given the critical role of National Parks in the tourism future of Zambia it is recommended that these activities be placed under to the specialist management and financing of the RDA. Key issues to be addressed in the short term, are the expansion of all-weather road network in key parks like South Luangwa and Kafue.
- ☞ *Set up a specialist ‘tourist unit’ in RDA:* The Tourism Master Plan priorities should be given specialist consideration in road planning and RDA will integrate the tourism ‘voice’ into the decision-making process for road linkage construction and maintenance. The unit should focus on the tourism implications of proposed roads and routes to be built for other economic purposes and ensure protection for tourism resources and locations on the one hand but also to maximise their accessibility on the other. The unit should liaise closely with MoTA and especially DNPW to agree on road improvement priorities in TDAs and national parks, as proposed. It may be considered appropriate to commission a study, which could recommend the structure, remit and authority of such a specialist unit.

## 5.3 Goal 3: To create a favourable business and investment climate

Based on the challenges and opportunities identified in the situation analysis, four strategies will be followed in achieving this goal i.e.

- Improve land tenure and encourage investment in tourism priority zones
- Reduce investor cost and bureaucracy of doing business
- Improve law-enforcement and protection of wildlife and other natural and cultural resources in parks and protected areas
- Improve community benefits and strengthen public-private-community partnerships

### 5.3.1 Improving land tenure and encouraging investment in tourism priority zones

The system of land tenure, comprising of legal, social, political and economic dimensions is the framework through which a prospective investor gains access to land and associated resources for the purposes of developing and operating a business and it is thus, arguably, the most important building block in the entire process. Given the significance of land tenure factors then, it is critical for that framework to be easily understood and to be transparently administered thereby creating certainty and confidence from an investor's perspective, yet currently, the system operates inconsistently and at times lacks transparency. There is therefore a need for improvement to the land tenure position and its creation of greater investor confidence and encouragement but also for this to be combined with supportive investment incentives. The following actions are proposed:

Actions:

- ☞ *Formulate and update management plans for all conservation areas:* As recorded in the situation analysis the General Management Plans (GMPs) of various key National Parks and the GMAs are incomplete or out of date. While the lack of funding inhibits effective planning, this state of affairs in some important parks and GMAs is also attributable to other factors such as ad hoc land rights awarded by some traditional leaders and disagreements between DNPW, private sector owners and communities. Since the Tourism Destination Areas (TDAs) proposed in the ZTMP include both National parks and GMAs, an integrated approach to tourism development is essential and this requires completed management plans with clarity and consistency, especially on concessionary policy. DNPW and MOTA must quickly ensure completion and agreement upon incomplete plans and ensure agreement for those other plans where this is still outstanding.
- ☞ *Promulgate and implement a transparent and consistent concessions policy for nature tourism areas:* No clear concessions system exists across the National Parks and the GMAs and land allocations in such conservation areas are managed on an ad hoc basis. Security of tenure for leases to tourist enterprises in National Parks and a level playing field for acquiring leases are important factors for attracting new investment and thus these leases need to be flexible in length with large-scale accommodation developments being offered at least 49 years. The identification, costs structures, lease periods, advertising, adjudication and negotiation of concessions must be conducted in accordance with a consistent, transparent and well-structured process. Where concessions are given on communal land, the concession lease period, conditions, cost structures, etc. should be consistent with the national concessions policy. The Ministry of Lands should conduct proper due diligence of deals made before issuing land titles in GMAs.
- ☞ *Provide VAT relief for products required to activate priority Tourism Development Areas:* To encourage both investment in the tourism sector and visitors to visit new or redeveloping areas of the country, it is proposed to introduce VAT at 0% rate in designated zones for tourism products that actively contribute to the expansion of TDAs, as specified in the tourism area plan (Chapter 6). This incentive would be in place for a limited period and be timed to support the investment phasing proposed for the different TDAs. This incentive can be likened to a variation upon the existing Multi Facility Economic Zones (MFEZ) framework, which retains the fiscal incentives,

included in those zones but uses different geographic locations, investment threshold and VAT guidelines.

- ☞ *Reduce the rate of Service Charge levied on the accommodation sector:* To improve the price competitiveness of the Zambian tourism product it is proposed to reduce the mandatory rate of Service Charge levied in the accommodation sector across the country, from 10% to 5%. Zambia is currently out of step with its neighbours and principal market competitors who's Governments have not introduced a mandatory Service Charge and thus a reduction in the rate levied will bring Zambia competitiveness of the Zambian accommodation product. To compensate for potential losses in employee incomes minimum wages should be enforced and tourists should be encouraged to tip. Alternatively, Zambian prices should be promoted with the clear understanding that there is a service charge on prices and that Zambia has a no-tipping policy.
- ☞ *Exempt MICE delegates to Lusaka from paying VAT:* To assist with the development of Lusaka as a major regional MICE destination, it is proposed to introduce a system for exempting individual accredited conference delegates from paying VAT upon their legitimate hotel, restaurant and related expenses incurred during their attendance at the event. Individual eligibility for this tax concession could be verified through the possession of a letter/card issued by the conference organiser confirming the owner's delegate status.
- ☞ *Remove VAT and important duties on dedicated tourism vehicles and equipment:* To further assist the development of tourism activities and businesses around the country it is proposed to remove the VAT and import duty upon motor vehicles, safari vehicles and equipment used in the direct operation of such businesses that are registered with MOTA and/or ZTA and meet certain minimum thresholds of business scale.

### 5.3.2 Reducing investor cost and bureaucracy of doing business

Business costs and bureaucratic delays affect all parts of the economy and while some of these issues are particular to the tourism sector and need to be tackled through the sector, others have wider economic application and have to be tackled differently, more cooperatively, with other industry sectors. This will include the following actions:

Actions:

- ☞ *Improve public-private liaison regarding tourism development constraints and ensure implementation and follow through of decisions:* Issues raised in this report such as time consuming and costly border formalities, fragmentation of business licences, procedural delays in securing electricity for new ventures etc. ultimately affect all business sectors and contribute to higher costs, which make the country less competitive and attractive to invest in. The tourism sector (i.e. the Tourism Council of Zambia (TCZ) other private sector representative bodies and MOTA/ZTA) - must meet regularly to discuss such concerns and make sure that the tourism sector's voice on these matters is heard, lobbying for improvements. Most importantly, while such meetings have in the past occurred on an ad hoc basis their track record pertaining to implementation has been rather poor. Regular meetings and proper monitoring and recording of decisions will be key to progress.
- ☞ *Engage the local financial sector to foster an improved understanding of tourism financing opportunities:* Borrowing costs from the banking sector in Zambia are comparatively high and this affects all sectors of the economy and the SME sector particularly but often interest rates for tourism sector businesses can be higher because the belief is that tourism is a higher risk sector with longer payback periods. It would be helpful if MOTA and TCZ worked together, to engage with the banking sector in a series of workshops around the country giving them a better understanding of the Zambian tourism sector and its performance, the new ZTMP, and the opportunities represented by the Plan.

- ☞ *Reduce the number of licenses required from tourism businesses and simplify the licensing process:* Business licensing is a major burden on an industry that primarily comprises medium and smaller businesses that do not have the resources and manpower to engage in excessive administrative red tape. To overcome this problem ZTA must examine the opportunity to reduce the number of licences required – ideally to one per accommodation establishment – and to examine the introduction of a self-regulatory system for licensing with an on-line licensing service available. This on-line service should also be available in the ‘one-stop shops’ set up around the country to simplify access to multiple agencies.
- ☞ *Improve tourism functionality at “one-stop-shop” business centres:* While “one-stop” business service centres have been operational in Lusaka and Livingstone the industry does not regard these as very effective for tourism purposes. An evaluation will be conducted of tourism effectiveness at business service centres and improvements will be made as required.

### **5.3.3 Improving law-enforcement and protection of wildlife and other natural and cultural resources in parks and protected areas**

The issues of general law enforcement together with the protection of wildlife and other natural and cultural resources in parks and protected areas are fundamental for the securing of these resources into the future for Zambians and international visitors as citizens or tourists. Unfortunately, DNPW (and the National Heritage Conservation Commission) has limited capacity and resources to fulfil its responsibilities over such a vast area of the country but it has in some instances been able to make co-operation agreements with both highly experienced international wildlife and park management organisations and several equally experienced Zambian NGO’s (African Parks, Kasanka Trust, Frankfurt Zoological Society, David Shepherd Wildlife Foundation, Conservation South Luangwa, Conservation Lower Zambezi etc.) to manage several national parks and protected areas (Liuwa Plains NP, Bangweulu Wetlands, Kasanka NP, Lavushi Manda NP and North Luangwa), protected areas and provide specialist anti-poaching services.

While these initiatives are commendable their sustainability and extent of their operations is not guaranteed into the future and the Ministry cannot rely on the external partners to take over the law enforcement responsibilities of the DNPW. The law enforcement capacity and capabilities of DNPW will be significantly strengthened through, among others, the following actions:

Actions:

- ☞ *Increase DNPW financing and capacity for nature law enforcement and especially anti-poaching:* DNPW should be an early beneficiary from the MOTA Tourism Fund monies to fund additional law enforcement staff capacity and cover the cost of vital training and skills transfer in these key areas of national park management and conservation.
- ☞ *Further strengthen public-private partnerships in conservation and law enforcement:* Additional funding sources will be used in joint financing partnerships with the various NGOs and conservation organisations to develop and strengthen DNPW capacity and operations in terms of a well-structured and staged capacity building programme. These organisations are securing wildlife and habitats, managing community relationships and developing an enabling environment into which tourism development investment can be attracted and can further assist DNPW through:
  - Demonstrating successful techniques and operational models for law enforcement, anti-poaching, wildlife conservation and community partnerships
  - Enabling DNPW staff members to be trained in those successful techniques and operational models for their subsequent introduction into DNPW’s own national parks

### 5.3.4 Improving community benefits from non-consumptive tourism

One of the key challenges facing the sustainability and conservation of wildlife and other cultural and natural resources in and around National Parks, Game Management Areas and heritage sites, is the need to demonstrate to local citizens living in these areas that non-consumptive tourism provides sustainable benefits that are equal to or better than those provided by consumptive (hunting) tourism. Currently there is a major imbalance in community benefits derived from hunting, through distribution of hunting license fees to traditional leaders and Community Resource Boards (CRBs), and photographic tourism from which communities living in GMAs do not derive any financial or other rewards. This does not auger well for sustainable wildlife management and expansion of tourism, leading to communities often undervaluing the wildlife conservation, conflicts between commercial hunting and tourism lodges, domestic poaching, etc. The following actions are proposed to strengthen community benefits from non-consumptive tourism and reducing conflicts between consumptive and non-consumptive tourism:

Actions:

- ☞ *Implement suitable mechanisms to ensure communities get a share of non-consumptive tourism revenues:* Various mechanisms will be considered and their implications assessed and quantified for improving the share of non-consumptive tourism. The following mechanisms, among others, will be investigated and considered for supplementing CRB funds through non-consumptive tourism:
  - *Land user charges:* The Zambia Wildlife Act (No. 14 of 2015) provides for the Ministry to levy land user fees from leaseholders in Game Management areas. The challenge with implementing these charges is that operators who hold title leases in GMAs fall outside of the provisions for GMAs. The Act will be amended to make user fees compulsory to all tourism operators in GMAs. Most importantly, any additional land-user charges need to be complemented by adequate government services relating to road and other infrastructure improvements.
  - *Share of gate revenues:* Gate entrance fees to national parks could be raised by approximately 10% and this additional contribution will go towards CRB funds.
  - *Tourist contribution fee:* Alternatively, a nightly community development fee could be raised on all accommodation bills at lodges in GMAs and this will accrue to CRB funds. The purpose and use of such fees should be clearly communicated to tourist so that they realise they are contributing to community upliftment.
- ☞ *Use the Tourism Development Fund as distribution mechanism for community fees:* The bureaucracy involved in redistributing the community's share of revenues to CRB often leads to long delays in payments and frustrations at community level, since CRBs are then not a position to pay scouts and honour other commitments due to cash flow constraints. A special account for CRBs will be set up in the Tourism Development Fund and CRB portion of both consumptive and non-consumptive fees will be paid directly to the Fund by public and private contributors.
- ☞ *Improve auditing and governance of CRB funds:* While the Wildlife Act requires of CRBs to submit audited account statements, the selection and appointment of auditors is in the hands of CRBs. To ensure timeliness and objectivity of auditing the selection of and conditions pertaining to auditing of CRB funds should vest with the Ministry of Tourism Development Fund, depending on who disburses funds to CRBs.
- ☞ *Plan all GMAs to separate hunting and photographic tourism:* The current mixing of consumptive and non-consumptive tourism in the same zone in some of the GMAs is not conducive optimising community revenues from tourism and does not support Zambia's position as a high-quality safari tourism destination. GMAs should be properly planned once income streams from photographic tourism have been secured and communities can see the value of non-consumptive tourism taking place in GMAs. GMPs as prescribed in the Act should provide for separate zones for photographic tourism, game ranching and hunting, agriculture and other economic activities that could provide sustainable incomes for communities.

### 5.3.5 Upgrading quality standards

A revised system of accommodation classification and grading was developed following the enactment of the 2007 Tourism and Hospitality Act but this was never implemented and what is in place currently is an ad hoc arrangement, which is based upon the pre-2007 position. This situation provides inadequate visitor guidance to both the differentiation of quality in the supply of accommodation available and the range of services on offer from that supply. The need to improve standards and quality across other tourism products and services, in addition to the accommodation sector, is also recognised and the following points address all of these various issues of quality standards:

- ☞ *Implement a relevant and practical classification and grading system:* ZTA has responsibility for developing the objectives, criteria and framework for the new accommodation classification and grading system, in collaboration with Zambia Bureau of Standards and this must result in an uncomplicated approach that uses both quantitative and qualitative criteria, compatible with existing SADC member systems, and is capable of securing rapid acceptance for, and issuance of, the necessary Statutory Instrument that authorises implementation. The following factors will be considered in implementing a sustainable system:
  - ZTA must ensure the financial viability and sustainability of the new system and thus adopt a suitable fee structure that ensures continuity of income.
  - ZTA currently has very limited staffing capacity to implement the new system and must either undertake a timely recruitment and training programme to provide the necessary human resources or outsource the implementation and on-going maintenance of the programme to a firm who, with ZTA assistance, will train and oversee the introduction and on-going operation of the new inspectorate.
  - ZTA must ensure the introduction of suitable grading management ‘tools’ such as more detailed criteria, grading time frames, procedures, scoring and weighting systems as part of the implementation process.
  
- ☞ *Develop a register of professional skills providers for qualitative advice to first time tourism sector investors:* Many existing and prospective investors in the accommodation and hospitality sector, particularly at the mid to affordable level of the market, are new entrants to the tourism industry and they often lack understanding of the operational quality and service standards required by the marketplace.

Thus issues ranging from project location, size, design and style through to food preparation, hygiene, marketing and financial management require careful attention from several perspectives and early stage advice and guidance is recommended. As a starting point, MOTTA should work with the various professional bodies representing Architecture, Design, Banking, Accounting, Catering and Marketing to identify suitably experienced firms for inclusion in a register of support skills for prospective and recent investors to approach. Access to this register would be available through MOTTA and industry websites.

- ☞ *Improve medical provision and emergency services for tourism:* MOTTA must work with DNPW, African Parks, Frankfurt Zoological Society, safari lodge operators and provincial hospitals to develop a suitably improved medical services capacity and quality in the national parks and to develop a strengthened approach to emergency response and rescue in those parks.

### 5.3.6 Developing tourism human resources

Development and expansion of tourism in Zambia will see visitor growth to existing popular destinations but through implementation of the ZTMP will also see a much better distribution of visitors more widely across the country. This will require the expansion of accommodation, catering and other tourism services. This expansion and diffusion of the tourism sector brings with it the demand for more staff to service that growing market but it also requires those employees to be skilled and to match the service levels expected of a country determined to compete at a similar level to its major regional competitors. Current weaknesses in public and private sector skills provision need to be addressed as follows:

- ☞ *Increase the extent of skills training supply:* MOTA must set up a Working Group with TEVETA, the Hotel and Catering Association of Zambia (HCAZ), TCZ and regional vocational training bodies and institutions to identify current opportunities and barriers for the introduction and expansion of hospitality and tourism training in existing institutions around the country and to formulate a joint approach for increasing the supply of accredited training courses.
- ☞ *Ensure that tourism training supply and content matches industry needs:* The MOTA-led Working Group must also facilitate closer cooperation between private employers and training institutions to ensure that the type and quality of training required by the industry is met by improved curricula and teaching practices. Regular feedback should be given to training institutions regarding industry training demand and potential uptake.
- ☞ *Improve the quality of tourism skills training facilities, staff and curricula:* MOTA and TEVETA must pursue the stated policy directive for the development of tourism training ‘centres of excellence’ and work directly with the Council and management of ZITHS, in first instance, as the institution best placed to evolve into such a well-equipped, fully qualified and staffed institution capable of delivering training compatible with contemporary industry practices. MOTA and ZITHS will work together with private sector investors and international hotel brands represented in Zambia, to improve the experience and knowledge of ZITHS staff members. ZITHS will also explore their own links with international hospitality training institutions to strengthen staff expertise, curricula development and operational excellence. Once the development of ZITHS as a ‘centre of excellence’ is underway consideration can then be given to opportunities for developing similar institutions in both Livingstone and perhaps the Copperbelt.
- ☞ *Improve skills and service levels in the workplace:* MOTA must work with ZITHS to further develop and extend the use of the latter’s ‘mobile training’ programmes which are already available to private clients. These programmes are drawn up to meet a client’s particular needs e.g. customer care or hygiene and food production etc. but a suite of these programmes could be prepared as basic level training tools for small businesses in the hospitality and tourism sector. MOTA, ZITHS and other possible sponsors could deliver these programmes on a regional basis to groups of small businesses to support skills training and service delivery.
- ☞ *Encourage entry of skilled workers from elsewhere in certain specialised areas:* MOTA should consult with HCAZ and TCZ to establish their concerns and identify the skills needed from outside of Zambia that are required to deliver the breadth, quality and service delivery of their businesses in a competitive regional market. MOTA should also consult with the Department of Immigration to understand their perspective and to ensure that any misunderstandings are clarified enabling the entry and work permit requirements for required specialised skills to be met and entry secured. Such foreign skilled personnel in specialised areas are also able to transfer their experience and skill to local employees thus developing their own and Zambia’s skills base.
- ☞ *Improve tourism understanding at schools level:* While hospitality studies are already offered as a subject in vocational schools, TEVETA and the tourism industry need to discuss the opportunity for further improving tourism and hospitality programmes as well as the provision of content for existing school courses. Collaboration with private hospitality providers must also be strengthened.

In addition, familiarity with the tourism sector will lead strengthen Zambia’s overall hospitality culture and can be useful for encouraging school leavers to consider it as a career path and supports the industry’s need to attract more employees as the sector develops and grows. General tourism awareness will be stimulated by introducing tourism concepts in subjects like geography, languages, life skills etc. to convey and understanding of tourism as an activity, its place in Zambia’s economy and its opportunity for employment. MOTA and the Department of Standards and Curriculum for General Education should work together in drawing on similar projects implemented in other destinations. Art, essay, drama and other competitions will be launched to strengthen tourism awareness.



## 5.4 Goal 4: To raise demand for destination Zambia

The followings strategies and actions will be implemented in addressing the key success factors identified during the situation analysis:

### 5.4.1 Evolving and strengthening Zambia's tourism brand proposition

As indicated in Chapter 2 the current destination brand proposition and identity “Let’s Explore” does not adequately reflect Zambia’s market positioning and uniqueness. At the same time it is recognized that substantial investment has been made during the past few years in promoting the brand. It is sensible to evolve rather than to replace the destination brand and the following approach will be followed:

Actions:

- ☞ *Strengthen the destination brand proposition and slogan:* The brand slogan “Let’s Explore” will be replaced with a slogan that reflects Zambia’s positioning as the “custodian of the Zambezi”. A suitable slogan will be selected from various options formulated with the assistance of a communications expert, in consultation with a selected group of public and private sector marketing professionals. The following examples may be considered:
  - Zambia: Treasure of the Zambezi
  - Zambia: Heart of the Zambezi
  - Zambia: Secrets of the Zambezi
  - Zambia: The Zambezi and Beyond
  - Zambia: Untouched Zambezi
  - Zambia: Roaring Zambezi
  - Zambia: Untamed Zambezi

The current “Let’s Explore” slogan will be used as an “call-to-action” campaign theme when promoting Zambia domestically and internationally.

- ☞ *Refresh the brand identity and imagery:* The brand identity (logo) design will be refreshed and strengthened. Technology, design trends and market preferences have changed considerably over the past decade period and it may be opportune to refresh and modernise the brand design, especially for application in foreign markets without detracting from the brand equity already built up with major investment.

As with other brands Zambia’s brand reputation and image could be impacted negatively from time to time, through health, natural or man-made disasters outside of the control of the tourism authorities. The tourism authorities should prepare for such events and respond effectively so as to avoid as far as possible undeserved damage to the image of Zambia. The following steps will be taken:

- ☞ *Form a tourism communication work group:* The workgroup will be chaired by MoTA and will comprise the police services, disaster management services, government communication and other relevant parties. The workgroup should be responsible for formulating a crisis communication plan and to act as a communication mechanism for the tourism sector in event of disasters and other events that may affect the brand reputation of Zambia
- ☞ *A tourism communication plan will be formulated for managing communication in case of events that may impact on the brand.* It should address roles and responsibilities for communication, message and communication protocols, etc. in event of a crisis

Local destinations like Livingstone, Lusaka, South Luangwa, Lower Zambezi and others are important tourism brand partners especially in the domestic and regional source markets. Given the current strong clustering of tourism operators in key tourism areas visitors are likely to select local destinations rather than provinces as travel destinations. The Tourism Development Areas and Circuits identified in the structure plan will be supported in developing differentiated identities, through the following steps:

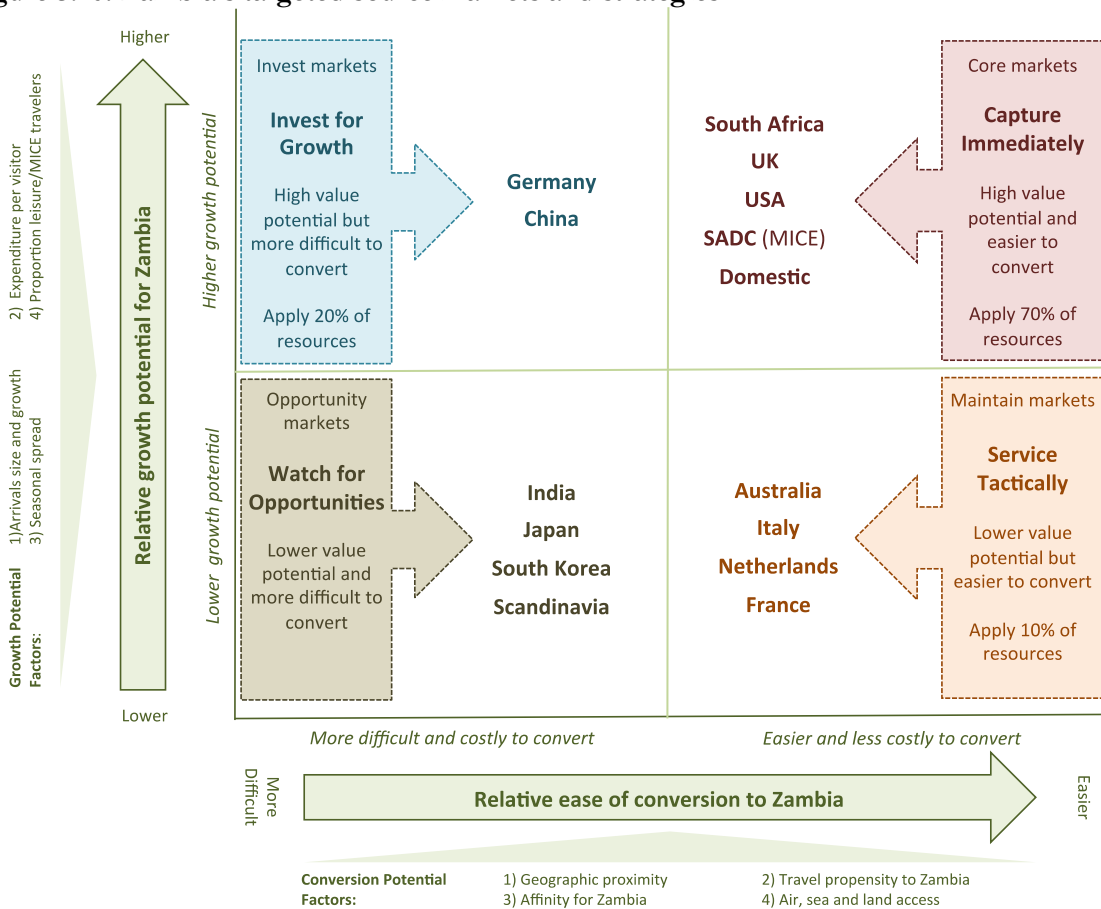
- ☞ *Form a local national-provincial-local marketing partnership forum:* the forum will be established to strengthen existing cooperation and partnerships and as a basis for joint branding and promotion, chaired by ZTA with the objective of agreeing a portfolio of complementary brand messages and images for the various cities and engaging in joint promotion activities.
- ☞ *Agree a protocol for joint branding and marketing:* ZTA and its partners in local and provincial tourism associations will agree on a protocol for collective brand promotion, including how the Zambia national brand and local brands could co-exist on websites, advertising, social media and other visual platforms; how brand promotion costs could be shared and how the ZTA and the cities could support each other in strengthening local brand diversity..

### 5.4.2 Focusing marketing in high potential international source markets

The market analysis conducted in Chapter 2 indicates that leisure and MICE tourism comprise a limited share of tourism arrivals to Zambia and together these two categories contributed only around 28% of total visitor arrivals in 2015. The proportion of leisure visitors has to increase significantly and it will be important to reach consumers in key target source markets to raise Zambia’s profile. The following Figure 5.1 and Table 5.1 present Zambia’s leisure and MICE target market strategy to be followed:

- *Core Markets:* RSA, UK, USA and SADC (for MICE), Capture Immediately and apply 60% of resources
- *Invest market:* Germany and China: Invest for Growth and apply 30% of resources
- *Maintain markets:* Australia, Italy, Netherlands, France, Service Tactically and apply 10% or resources
- *Opportunity markets:* India, Japan, Korea, Scandinavia, Watch for opportunities, no resources

Figure 5.20: Zambia’s targeted source markets and strategies



**Table 5. 8: Target source market strategy and promotion approach**

Priorities	Countries	Strategy	Promotion approach
<p><b>Core markets</b></p> <p>High growth potential, high affinity for leisure travel to Zambia and are easier and less costly to penetrate</p>	<ul style="list-style-type: none"> <li>• South Africa</li> <li>• UK</li> <li>• USA</li> <li>• Zambia Domestic</li> </ul>	<p><b>Capture Immediately</b></p> <p>Focus most promotional activities here in the short and medium term</p> <p>Apply 60% of marketing resources</p>	<p>Apply the full promotion mix including:</p> <ul style="list-style-type: none"> <li>• Tourism dedicated market representation</li> <li>• A major PR and media drive</li> <li>• Extensive digital advertising and social media focus</li> <li>• Selective consumer advertising</li> <li>• Attendance of travel trade and consumer fairs</li> <li>• Major trade education and joint promotions drive with operator partners</li> <li>• MICE sales and trade fairs</li> </ul>
<p><b>Invest markets</b></p> <p>High growth potential, low incidence of leisure travel to Zambia and more difficult and costly to penetrate</p>	<ul style="list-style-type: none"> <li>• Germany</li> <li>• China</li> </ul>	<p><b>Invest for growth</b></p> <p>Focus some promotional activities here towards growing these into the core market portfolio</p> <p>Apply 30% of marketing resources</p>	<p>Selective activities e.g.:</p> <ul style="list-style-type: none"> <li>• Selective travel trade and media education and familiarisation program</li> <li>• Selective travel trade joint promotions and education with inbound and foreign operators</li> <li>• Major online drive through language content expansion (German, Mandarin) and suitable social media channels</li> </ul>
<p><b>Maintain markets</b></p> <p>Lower growth potential, some affinity for leisure travel to Zambia and relatively easy and less costly to penetrate</p>	<ul style="list-style-type: none"> <li>• Australia</li> <li>• Netherlands</li> <li>• France</li> <li>• Italy</li> </ul>	<p><b>Service tactically</b></p> <p>Focus limited promotional activities here aimed at increased penetration by</p> <p>Apply 10% of marketing resources</p>	<p>Mainly information provision and education, including:</p> <ul style="list-style-type: none"> <li>• Providing SADC-focused and special interest travel trade with product updates and information</li> <li>• Strengthening existing travel trade relations to ensure expansion and deepening of packages</li> <li>• Major online drive through language content expansion (French) and suitable social media channels</li> </ul> <p>Communication with travel trade in collaboration with local inbound operators</p>
<p><b>Opportunity markets</b></p> <p>Lower growth potential, low incidence of leisure travel; more difficult to penetrate</p>	<ul style="list-style-type: none"> <li>• India</li> <li>• Japan</li> <li>• South Korea</li> <li>• Scandinavia</li> </ul>	<p><b>Watch for opportunities</b></p> <p>Leverage ad-hoc marketing opportunities</p> <p>Use spare resources only to support partners</p>	<p>Marketing activities will depend on the nature and extent of opportunities that emerge at limited or no cost to Zambia</p>

**Actions:**

☞ *Develop a 3-year promotion plan for target international source markets:* ZTA should draft a three-year rolling promotion plan based on this marketing strategy, which should be presented to the MoTA and to the Ministry of Finance for approval and endorsement. The marketing plan should be the blueprint for ZTA’s activities, with limited scope for ad hoc marketing decisions to disrupt marketing momentum created and usurp much needed marketing funds.

☞ *Create a realistic balance between domestic and international marketing:* As shown in the situation analysis the balance of resource allocation between domestic and international marketing has fluctuated hugely in recent years. On average there has been an almost equal split in manpower and

financial resource allocation between these geographical focus areas. While domestic tourism is important as a bedrock of tourism market stability in the longer term, the combined expenditure potential of international markets provides Zambia with a much greater tourism growth potential in the short to medium term. As such, a consistent, longer term approach will be taken in growing domestic tourism with a annual share of around 20% of resources being allocated to domestic promotion, while the majority of ZTA resources will be allocated to international tourism marketing in the short to medium term.

### 5.4.3 Strengthening and expanding ZTA's marketing capacity

As indicated in the situation analysis ZTA's budget and staff capacity is wholly inadequate to promote Zambia as a preferred destination and reaching the target set in this strategy. The organisation's capacity will be significantly strengthened and the following actions will be undertaken:

- ☞ *Significantly increase ZTA's marketing budget, through a special budget allocation:* The success of this strategic plan is largely dependent on raising Zambia's tourism profile internationally and domestically. Since the Tourism Development Fund is expected to take time to reach adequate funding levels and demands on such funds may be varied in purpose, adequate promotional funds must be secured from the Ministry of Finance as a ring-fenced budget allocation on a rolling three-year basis, until such time as the Tourism Development Fund is capable of sustaining an appropriate marketing budget.
- ☞ *Prioritise marketing for funding allocation from the Tourism Development Fund (TDF):* The Tourism and Hospitality Act of 2015 states that the funds of TDF can be used for a variety of purposes, including "purposes of tourism product development, tourism infrastructure, tourism marketing, tourism training and research." Given the importance of promoting Zambia, priority must be given to funding allocation in support of destination marketing.
- ☞ *Appoint specialized destination marketing representatives in key international markets:* Promoting "destination Zambia" in foreign markets requires the support and services of individuals and/or companies that specialize in outbound tourism promotion, are well-experienced and have strong travel trade networks in these markets, without being attached to a particular outbound operator or to a Zambian diplomatic mission. Relying only on Zambian missions abroad to represent the country as a tourism destination is inadequate due to the diplomatic nature of their work, the security requirements of missions that limit access to the public and travel trade and not being an integral part of the tourism industry. Dedicated marketing representatives will be appointed on a performance contract basis, firstly in core markets i.e. South Africa, the UK and USA. Their tasks will be to draft and execute effective marketing plan in these markets.
- ☞ *Establish a dedicated MICE unit:* promoting MICE tourism differs entirely from leisure tourism marketing in terms of target markets, audiences, distribution channels, sales techniques etc. The role of ZTA in MICE marketing is to establish the image of Zambia as a MICE destination, to support local and international organisations and associations in bidding for hosting larger conferences in Zambia and to entice corporate meeting planners to consider Lusaka as a venue for their meetings. While ZTA has already appointed an individual to focus on MICE marketing a separate dedicated small unit must be established to work with the hospitality sector and meeting venues in promoting Zambia as a MICE hub for Africa.
- ☞ *Strengthen online marketing capacity:* Given the high cost of traditional TV and print advertising, ZTA's quest for raising Zambia's image and awareness among consumers will largely depend on its ability to leverage digital media, including online search optimization, online advertising and creating social media traction. While ZTA has put more emphasis on online marketing in recent years' organizational capacity and specialization in this field remains limited in the organisation. As with MICE marketing a separate digital marketing unit must be established.

#### 5.4.4 Launching a multi-year promotion campaign

An anchor campaign theme, in support of the new brand slogan will be developed for promoting Zambia in print, electronic and digital media over a number of years. The campaign theme should include a strong call-to-action, e.g. “Explore Zambia” and should be widely used when promoting product themes, destinations and routes on websites, newsletters, social media, printed materials etc. e.g. “Explore rock art”, “Explore birdlife”, “Explore the Zambezi Source”, “Explore Tanganyika”, etc.

Actions:

- ☞ *Devise campaign imagery and collateral:* The following elements will be considered for creating a strong campaign identity:
  - A suitable campaign theme, slogan and plan, preferably with support of professional marketing agencies
  - A campaign logo and ‘look and feel’ design, in support of the national brand identity, which should be distributed widely to industry partners
  - A special campaign widget on the [www.zambia.travel](http://www.zambia.travel) where visitors can click to access campaign offers, participating tour operators, etc.
  - Campaign branded exhibition stands for major fairs
  - Downloadable screensavers and wallpapers
  - Campaign stand-alone desktop, floor and window displays for use by trade partners
  - A downloadable still image and video library
- ☞ *Build partnerships and alignment with marketing campaign:* It will be vital to the success of the promotion campaign to engage the local and foreign travel trade in “owning” the campaign and using campaign messages and marketing collateral, such as on websites, print brochures, exhibition designs, etc. Many of the private accommodation suppliers, safari companies and tour operators in Zambia have long-established relationships and preferred partner status with outbound wholesalers and agents in key markets and ZTA must engage such local companies in negotiating joint marketing initiatives and special campaign offers with international sales and distribution partners.
- ☞ *Coordinate all marketing activities in support of a campaign roll-out programme:* All marketing activities, be it advertising, trade familiarisation, exhibitions, media tours, online advertising, PR, etc. should be carefully choreographed in support of the campaign theme and a detailed, multi-year campaign programme will be formulated to harness activities, events and content behind the campaign.
- ☞ *Launch a dedicated domestic advertising campaign during the slower season:* ZTA’s domestic advertising campaign has laid the ground for further expansion of domestic travel offers. It will be important to expand travel offers to include more affordable offers. The following specific guidelines will apply:
  - Promotions could be focused on certain months of the year, e.g. the ‘shoulder’ seasonal months of November through to March and launched at least six months in advance of the actual travel periods
  - ZTA will collaborate with Proflight, local accommodation operators (e.g. partnering members of LILOGA in Livingstone and other local lodge owners), travel agencies, transport providers in coming up with affordable travel opportunities and offers for groups, families, etc.
  - ZTA in collaboration with the Zambia Broadcasting Corporation and other domestic media will launch a local public relation, editorial and advertising campaign to promote domestic travel opportunities (possibly in the form of a treasure hunt with good prizes) and to raise interest of the unique attractions of the country

- The provincial and district authorities and private organisations will be given the opportunity of partnering ZTA and/or launching their own sub-campaigns and/or marketing actions in support of the national campaign

#### 5.4.5 Strengthening travel trade marketing

The promotional campaign will draw heavily of travel trade relations and a travel trade promotion and sales drive will be undertaken in both ‘Core’ and ‘Investment’ markets including:

Actions:

- ☞ *Exhibiting at selected Trade Fairs:* The increasing status and power of the World Wide Web and other communication technologies such as VOIP, email, cellular telephones, video conferencing, etc. has in recent years largely reduced the necessity of face-to-face sales meetings with key trade partners. Many of the smaller foreign operators have also been usurped in recent years by the bigger conglomerates resulting in fewer, but more powerful buyers. Tourism suppliers and destination marketing bodies often leave exhibitions with feelings of frustration at the limited number of serious, new business generated. A focused trade fair strategy is recommended, based on the target market strategy presented above and the following travel trade fairs will be supported and attended during the period of the marketing strategy:

- WTM – London
- Indaba – Durban (Attend only one of WTM Africa or Indaba)
- ITB – Berlin
- COTTM – Beijing

The following guidelines should be applied to exhibition attendance:

- Exhibitions should be an integral part of the campaign mix and should not be treated as separate or ad-hoc initiatives.
  - The timing, design conceptualisation and communications pertaining to exhibitions should be planned to maximise the promotional value of the integrated promotion campaign
  - Adequate background research should be conducted to establish the nature, quality and potential of trade and consumers attending exhibitions and where possible partnerships could be formed.
  - Adequate preparation should precede attendance of fairs. Preparation meetings should be held with Zambian exhibitors to ascertain how best the specific fairs can be leveraged and how ZTA can assist the private sector in making most of their investment
  - Clear, measurable goals (e.g. business procured for Zambia, travel trade agreements concluded, media exposure achieved, etc.) should be set for each exhibition and the results should be measured accordingly
- ☞ *Ensure regular communication with the travel trade:* Customer relationship management (CRM) possibilities should be optimally leveraged and adequate details and profiles of international travel trade partners should be obtained and logged on a database, with proactive communication and feedback to the international and local travel trade on a regular basis. Several open-source CRM software platforms on the market will be investigated and a relevant system will be procured.
  - ☞ *Invest in suitable Joint Marketing Agreements in core markets:* Joint marketing will be actively pursued with tour operator partners in core markets to promote the campaign. The ZTA’s investment in trade partnerships should preferably entail tactical activities e.g. online marketing drive, advertising, direct mail and email, distribution of flyers of special offers, etc. The impact of these should be closely monitored and measured. Investment in operator brochure pages, brochure advertisements and other initiatives that are essentially the corporate responsibility of trade partners should be avoided. Similarly, suitable promotion agreements must be entered into with online travel agencies (OTAs).

- ☞ *Build capacity of inbound Zambian operators*, who are in the best position to on-sell travel experiences to their international partners. Inbound operators will be supplied with campaign marketing collateral and travel trade educational will be arranged for inbound sales agents to experience the product first-hand.
- ☞ *Conduct road sales missions and workshops in Core markets*: The aim will be to arrange a series of travel trade workshops in each core market every year. A program of trade road shows and workshops will preferably be arranged before and/or after attending trade fairs to brief the major operators in target markets about the destination and experiences they could sell. Sales and promotion workshops should make a point of displaying and exuding the brand identity through appropriate decorations, entertainment, music food, etc.
- ☞ *Facilitate trade familiarisation visits for Core and Invest markets*: As part of the campaign ZTA will work with airlines flying to Zambia to host selected international operators on familiarisation visits. Consideration should be given to arranging one mega familiarisation trip (travel academy) per year to coincide with a significant event such as the opening of a major hotel or resort complex, convention facility, airport expansion, etc. Such mega event should include well-organised business-to-business workshops and meetings as part of the program, involving a spectrum of Zambian suppliers and tour operators.
- ☞ *Launch “Secrets of the Zambezi” agent affiliation program*: ZTA will launch an online education program for the international travel trade, with high quality destination information and fact sheets, allowing travel trade partners to complete a knowledge program and a simple test to be registered as a specialist in selling Zambia. A good example is the ‘Aussie Specialist’ program, consisting of 4 online travel trade training modules and a multiple-choice test, for which agents have to score at least 85% (<http://www.aussiespecialist.com/About.aspx>).

#### **5.4.6 Leveraging travel media exposure and public relations**

Together with online marketing effective media and stakeholder communication should provide ZTA with excellent returns on its marketing investment. The following actions will be undertaken:

Actions:

- ☞ *Produce and publish a press kit*: ZTA will compile a compendium of media information for distribution to travel media, on a flash drive or preferably on the website or a cloud-based file-storage platform where it can be easily accessed. The kit will include a series of destination articles and fact sheets in support of public relations and communication initiatives
- ☞ *Publish and promote celebrity stories*: Zambia has produced many celebrity athletes, models, business people, etc. Their inspirational stories and passion for Zambia need to be told and ZTA will launch a vibrant destination blog to carry the stories of high profile Zambians and their views on Zambia as a tourism destination. From here it will be shared with traditional and social media platforms
- ☞ *Strengthen media relations*: ZTA will strengthen its relationships with the international travel (trade and consumer) media and issues at least two international and local media releases per month in support of the marketing campaign to establish and maintain media awareness of tourism related developments and events in Zambia. The following guidelines pertain:
  - ZTA will compile and build up an appropriate database of media contacts that will include print, radio, TV, online and social media contacts
  - Specialist PR capacity will be created in ZTA to establish personal relations with travel journalists and to maintain continuity with information being distributed consistently to the same media person

- Communication topics should ideally focus on newsworthy events and developments that support the positioning as “guardian of the Zambezi”
  - Corporate/organisational releases will be issued regarding ZTA’s progress and campaign successes
  - Consideration will be given to outsourcing to external specialists parts or all of the press liaison work
- ☞ *Arrange travel press trips:* A major emphasis will be placed on inviting and hosting high quality travel media to explore and report on their travel encounters with Zambia. Media will be hosted in collaboration with private operators and international marketing representatives and itineraries will be designed to suit the interests of media invited. International media representatives will be drawn mainly from the “Core” and “Invest” target markets. ZTA will allocate a “guest programmes” role in the organisation to organise press trips and deal with travel media requirements
- ☞ *Track and measure media value:* A key element of the media program will entail to monitor media coverage following media interactions and to measure the results of such coverage in key target markets, to quantify the return on investment (ROI) and act accordingly. Professional media monitoring services will be appointed on an annual contract for this purpose. Following any press trip, media coverage emanating from the trip will be tracked in association with the journalists hosted and through media scanning and measuring the monetary value of column centimetres of print coverage, blog value and/or airtime received. This will be compared to the cost of hosting the journalist and calculating a return on investment.

#### 5.4.7 Repositioning ZATEX

Research conducted during the situation analysis stage indicates that the Zambian travel trade are not very positively inclined towards the Zambian Travel Expo (ZATEX) in its current form. The quality and focus of ZATEX will be improved during future events and the following actions will be implemented in this regard:

Actions:

- ☞ *Strengthen logistics of ZATEX:* To date ZATEX has been organised internally by ZTA and the logistics involved in doing so takes up a large part of ZTA’s staff capacity, detracting from the key performance areas and core business of the organisation. ZTA staff are also not experienced and skilled in staging and organising such exhibitions and as a result the organisation and programming of ZATEX is not rated highly by the industry. It will make sense to acquire the advisory and support services of a professional event’s organiser or to outsource the organisation and logistics of ZATEX to an external exhibition and events organising company following a bidding process.
- ☞ *Upscale the domestic consumer component of ZATEX:* Since Lusaka is the main travel source market for domestic tourism ZATEX offers an excellent opportunity for promoting domestic travel through exhibiting of lesser-known products and focusing on travel bargains and special travel offer for Zambians. Exhibitors will be encouraged to come up with travel prizes and special travel deals and the consumer days will be expanded and should include a wider spectrum of entertainment, refreshment, competitions and travel prizes. In addition to partnerships with tourism providers ZTA will approach corporate sponsors such as mobile phone companies, banks and other economic sectors that could benefit directly from tourism growth, to co-sponsor ZATEX.
- ☞ *Focus on engaging and attracting the regional travel trade as buyers:* Zambia is an integral part of the East and Southern Africa tourism circuits and inbound operators in established destinations like Kenya, Tanzania, Zimbabwe, South Africa, etc. could play an important role in packaging expanding the Zambian tourism circuit, both as an independent offer and extension of regional



tour packages. These companies are also easier to reach and the potential conflict between attending ZATEX and other trade fairs is less, given the easier access and shorter travel times. A special effort will be made to attract the major regional tour operators to attend as trade buyers.

#### **5.4.8 Strengthening the MICE (Meetings, Incentives, Conventions, Exhibitions and Events) sector**

MICE tourism is less affected by climatic and holiday policy issues and could play a major role in offsetting seasonality. Lusaka has a two good exhibition centres, however the international meetings and conventions industry is not well developed. MICE marketing calls for a different approach and a dedicated strategy since the client base and distribution channels for MICE are very different to those of the leisure market. The following steps are recommended:

Actions:

- ☞ *Develop a dedicated MICE marketing plan:* As indicated in section 5.4.3 above ZTA will establish a MICE unit that specialises in MICE marketing. This unit should develop a stand-alone strategic MICE business plan for Zambia. It should facilitate development and bidding by the cities for major national and international conferences. The MICE unit should eventually develop into a fully-fledged Zambia Convention Bureau should, among others, responsible for the following:
  - working in close collaboration with conference venues to promote Zambia as a regional MICE destination of choice
  - conducting a destination audit and setting up a suitable MICE inventory and database
  - developing a MICE brand and communication system (website, print collateral, PR)
  - packaging incentive and pre/post conference itineraries to take to market
  - attending at trade shows for promotion of MICE e.g. Meetings Africa, IBTM World, and others
  - coordinating the MICE industry sector
  - developing MICE professionals via mentoring and/or training of human capital
  - developing a bidding strategy along with bid book and supporting collateral
  - developing Convention Bureau measurement tools
  - hosting site inspection/familiarization trips for qualified meeting buyers
- ☞ *Improve facility standards in the MICE sector:* MoTA should work with and give every support needed to the Mulungushi Conference and Exhibitions Centre in Lusaka which has major expansion plans underway for a 5,000 person, state of the art, meetings complex with two hotels. Various proposals for stimulating the MICE sector in Zambia and Lusaka in particular are contained in other sections of this report, exempting MICE delegates from paying VAT and setting up a MICE unit in ZTA.
- ☞ *Identify and support a portfolio of three to five flagship ‘Zambia Great Events’:* ZTA should evaluate and identify a portfolio of flagship events of international stature that are most supportive of the “custodian of the Zambezi” positioning. This portfolio of events should be awarded ‘flagship’ status and given financial assistance as well as in-kind support at least for a start-up period e.g. permission to use the destination branding, public relations and media coverage, online marketing exposure, etc. ZTA should also maintain, in collaboration with the provincial and district authorities, a shared calendar of all events taking place throughout the year. This calendar should be part of a shared content management system, to be displayed on ZTA and other tourism websites and communicated through media releases, the destination blog, social media and other promotional channels.

#### **5.4.9 Prioritising online marketing tools and promotion**

As indicated in 5.4.3 digital marketing provides the most effective opportunity for ZTA to reach consumers directly in its key markets. ZTA will strengthen its online marketing capacity and will undertake the following actions in this regard:

- ☞ *Improve the official ZTA website:* ZTA launched its official website in 2017. While this is a positive step forward the website requires major improvements to make it competitive with other destination websites. Specific issues that require improvement include:
  - *Improved functionality and design:* The speed of upload and ease of navigation in some components of the website such as the image gallery is slow and the small text is difficult to read. The layout of the homepage and some content pages also requires review.
  - *Improved content and greater call to action:* While the website is rich in content in most areas there is no inspiration focus on enticing particular market segments to choose Zambia, for example marketing wording on the home page to highlight where Zambia offers exceptional experiences. The homepage must be redesigned and contact information, pricing, opening times etc. should be provided for attractions and experiences to allow visitors to plan and obtain more information regarding their visits.
  - *Improved product conversion drive:* The fact that the website currently has no product directory is a major drawback, since visitors want to link destinations, experiences and attractions with products and services. This aspect will be added as a matter of urgency and the destination pages should be linked to the product directory for each area
  - *Location maps:* Zambia is large and the largest part of the country is unknown to potential travellers. The website should orientate visitors regarding the location of each attraction and product or service, as well as the road and access network to reach there.
- ☞ *Populate, maintain and promote a range of social media accounts and content* (especially short video clips and stimulating imagery) for personal sharing and interaction in Zambia's key source markets. ZTA has already successfully piloted a Facebook marketing drive and will engage in multi-channel promotion on other social media channels.
- ☞ *Engage in a content drive and partnerships:* city tourism administrations, influencers, travel rating platforms such as Trip Advisor and digital ambassadors such as celebrity travel bloggers to procure high quality content for all online platforms and pages in languages of the target source markets. Content should be repurposed for multiple digital channels and platforms.
- ☞ *Launch special digital marketing campaigns in support of the overall promotion campaign,* aimed at creating awareness about Zambia and leading to direct bookings including:
  - creating, using and promoting hash tags e.g. #ExploreZambia, #ZambeziSecrets, etc.;
  - launching special campaign pages on websites;
  - promoting special online travel packages with OTAs and online fulfilment partners
  - conducting search engine and social media advertising with campaigns call to action
  - enlisting travel bloggers to experience and blog about relevant product segments
  - promoting visitor online sharing at key visitor sites, where there is Wi-Fi hotspot access
  - engaging Zambia celebrities, Zambian experts abroad and other influencers to #ExploreZambia' and share with their networks
- ☞ *Leverage online affiliates* as a powerful way of spreading the campaign message including affiliate partnerships with travel planning and booking channels and OTAs like Booking.com, Trip Advisor, WAYN.com and Expedia, as well as commissioning online PR incorporating Travel Bloggers with strong networks in key source markets.
- ☞ *Further expand an extensive database and procure a suitable Customer Relationship Management (CRM) technology* to gather client information, grow the travel trade and consumer database, facilitate information sharing with provincial and private tourism bodies and target promotions most

effectively.

- ☞ *Conduct effective email marketing:* It is essential that ZTA optimise its email marketing messages to ‘stand out from the crowd’ and success factors include beautiful design, a segmented database, visible and functional newsletter signup form on websites and social media platforms, social sharing buttons, incentivised promotions to encourage sign-up, opening of newsletters to target optimal timing, integrate email campaigns within overall marketing strategy. Measurability of responses is critical.

#### **5.4.10 Expanding visitor information services**

ZTA already has visitor information offices in East Park mall (Lusaka), Kenneth Kaunda International Airport (Lusaka), Harry Mwanga Nkumbula International Airport (Livingstone) and ZTA offices in Livingstone. Tourist information services will be further expanded to cater for the growing independent travel market, including:

Actions:

- ☞ *Improve the visitor information office network at entry points:* Providing for the visitor information needs of the growing independent travelling markets requires MOTA to work closely with the Department of Immigration to establish information points at the principal land border crossing points used by international tourist visitors, in further expanding the visitor information network. This will include e.g. Victoria Falls and Kazungula, the new arrivals terminal being built at Kenneth Kaunda International Airport and the new airport terminal buildings planned for Mfuwe and Copperbelt (Ndola/Kitwe) airports. Such information points need not be staffed and could also consist of display kiosks with maps and brochures, to be replenished on a regular basis.

A phased programme of new and improved visitor information points, desks, kiosks and signage must be planned and introduced with the participation of concerned city authorities, the National Heritage Conservation Commission and the Road Development Agency.

- ☞ *Expand local online visitor information services:* While such physical information offices are important online information sources tourists are increasingly using online information sources to plan their visits. Expanding online information will be facilitated through:
  - Developing mobile applications to promote the destination themes and circuits incorporating the critical success factors required for a high quality mobile app.
  - Working with mobile technology providers to improve Wi-Fi access in key tourist areas and encourage sharing of user-generated content through signage and mobile messaging.

## 5.5 Goal 5: To strengthen the management of the sector

The success of this strategy is entirely dependent upon the ability of the sector to harness financial and human resources behind the plan. The following strategies and actions will be undertaken to strengthen capacity in the sector.

### 5.5.1 Elevating the status of tourism as a national priority

It is clear from the situation analysis that the sector is largely under-resourced and that it lacks coordination. Although tourism is earmarked as a priority growth sector in fulfilling the ambitious targets set in the 7<sup>th</sup> NDP the sector does not yet enjoy the attention and priority it deserves and the following actions will be undertaken to elevate the position and priority of the sector:

Actions: technical assistance

- ☞ *Establish a presidential tourism council:* Tourism cuts across almost all Ministries and its success is highly dependent upon the coordination and cooperation of other partners such as National Planning, Immigration, Transport, Higher Education and Training, Finance and various others. Being a national government priority sector, the highest authority should direct all government institutions towards the future vision for tourism. The Ethiopian Tourism Transformation Council, a new task force led by the Prime Minister, sets an example in this regard. The council will be comprised of Ministers of all relevant Ministries and their Permanent Secretaries as well as provincial governors and will meet at least twice annually under chairmanship of the President or Vice-President. The main functions will be to:
  - Bring all Ministries relevant to tourism at senior executive level growth under one umbrella
  - Identify key aspects of the tourism strategy and instruct ministries to implement these
  - Identify and unblock obstacle that inhibit implementation and tourism growth
  - Monitor performance and progress
  
- ☞ *Establish a public-private Tourism Liaison Committee (TLC):* For the tourism strategy to be effective, there needs to be a strong network of stakeholder relationships that all share a common vision and participate in the development and implementation of the tourism development strategy. Public-private partnership does not mean that the parties have to agree on all strategic issues; rather issues and strategies of common concern should be identified and addressed through joint effort by all parties. The TLC could have various workgroups to deal with an agenda of key elements for advancing tourism growth.

The Committee will be chaired by the PS: Tourism and should comprise of the most senior level official of MoTA, ZTA, TCZ, and selected individual industry stakeholders with international expertise (including managers of international hotel chains). Its key role will be to inform and participate in implementing the strategies and actions contained in the strategic plan, especially where public-private partnerships are required. The committee should also recommend performance metrics to track the success of the tourism sector, as well as advice how best to use MoTA's limited funds to leverage public-private sector tourism partnerships and contributions. The TLC should meet on a regular basis on a schedule determined by its members and the head of the committee.

### 5.5.2 Streamlining and strengthening public sector tourism capacity

Public sector tourism organs will be instrumental in implementing the proposals of the ZTMP. Currently implementation capacity is weak and government organs must be streamlined and strengthened to lead the implementation of the various actions contained here. The following actions will be undertaken in this regard:

Actions:

- ☞ *Conduct an audit of staff capacity and strengthen tourism-related skills in the Ministry:* It will be important to have people at the helm of tourism that have relevant skills relating to economic development and tourism. An audit among Ministry staff of skills and experience in the economic development and tourism field must be conducted to identify gaps in economic development and tourism skills and address these through training and mentoring. In addition future recruitment should set out clearly the skills and experience requirements for new staff members to effectively implement the actions of the ZTMP and other tasks.
- ☞ *Review roles of the Department of Tourism and ZTA:* The allocation of law enforcement as a function of ZTA while retaining product development and investment promotion in the Department is questionable and is expected to result in role and industry conflicts. The roles should be revised to ensure ZTA fulfils its marketing mandate (including promotion, product development and information distribution) while the Department should take care of regulatory enforcement.
- ☞ *Strengthen and structure ZTA to fulfil its mandate:* Section 5.4 addresses the actions that should be taken to strengthen ZTA's marketing mandate. Another area that need to be strengthened under ZTA's current mandate is that of implementing the grading and classification system in a professional manner.
- ☞ *Investigate, streamline and align culture and heritage management capacity:* Various separate bodies deal with advancement of culture and heritage including the Department of Arts and Culture, National Heritage Conservation Commission (NHCC), National Museums Board (NMB) and National Arts Council (NAC). These organisations are largely fragmented and do not effectively coordinate their strategies, structures and resources. Issues that need to be investigated and addressed include:
  - Conducting a strategic audit of public sector organisations dealing with culture and heritage advancement to see where and how their programmes could be better aligned, both in terms of content, staff capacity and sharing of resources.
  - Viable and effective models for sustaining the national dance troupe and other cultural performance groups, possibly through a phased commercialization programme.
  - Viable and effective models for developing and managing cultural villages.
- ☞ *Establish a specialist tourism function in DNPW:* There is currently no specialist tourism capacity in DNPW, even though the department is responsible for conserving and developing some of Zambia's most valuable tourism assets. A specialist tourism unit will be established with, among others, the following functions:
  - Investigate, advertise and process tourism concessions
  - Advance sustainable tourism development in parks
  - Liaise with local communities regarding improvement of tourism incomes and benefits
  - Monitor private sector adherence to concession agreements and liaise with private operators in this regard
  - Other functions in the interest of sustainable tourism growth, as required
- ☞ *Strengthen provincial and local government tourism capacity and resources:* In view of the increasing devolution of development mandates to provincial and district councils and the inclusion of tourism in IDPs, it is vital that such local authorities should be equipped to support the implementation of tourism in their IDPs, the ZTMP and other plans. MOTTA will develop a proactive technical support programme through the proposed Technical Assistance Programme to such entities
- ☞ *Audit and if necessary restructure the Hostels Board of Management:* The HBM owns and operates no less than 11 accommodation establishments in Zambia. These offer major opportunities and make up a substantial component of the accommodation capacity in Zambia. However, the facilities and financial potential of the HBM are not optimally utilised. A thorough audit and due diligence of the business will be conducted and based on this, the organisation could be

privatised, commercialised, restructured or merely rebranded.

- ☞ *Create strong, viable local tourism partnerships:* Successful tourism development at local level and especially in the TDAs identified in this plan will depend heavily on cooperation and partnerships at local level between government bodies, private operators and communities. The establishment of Local Tourism Associations (LTAs) or at least forums for public-private dialogue will be encouraged, especially in the priority tourism development nodes.
  - All official local tourism associations should be accredited by ZTA and
  - The Tourism Act should be amended to encourage the establishment and affiliation of Local Tourism Associations.

Local forums should have as main functions, a) act as a voice on behalf of the tourism industry; b) foster community engagement and linkages; and c) conduct destination marketing, including managing a local destination website and social media, producing basic marketing materials, promoting specific events, conferences and meetings, and promoting local tourism awareness.

### 5.5.3 Improving the quality and reliability of tourism statistics and research

Reliable and accurate data regarding tourist arrivals, expenditure and movement patterns is vitally important for measuring and monitoring tourism progress and return on investment. The situation analysis report has highlighted the present weakness and unreliability of tourism arrival statistics and information on tourism expenditure and movement. These weaknesses should be addressed as a matter of urgency and the following steps will be taken:

Actions:

- ☞ *Conduct a thorough assessment of the procedures, processes and technicalities of producing international and domestic visitor arrivals data:* There is common agreement that there are flaws in the process of data collection, recording and publishing of tourist arrival statistics. Domestic tourism statistics are virtually non-existent. Given the complexity of parties and processes involved in recording, storing, cleaning, analysing and publishing visitor arrival information a thorough analysis will be conducted of each step in the process of compiling visitor arrivals data at immigration points, national parks and other key tourism points, as well as through appropriate surveys. Gaps will be addressed to ensure timely publication of visitor arrivals data and movement patterns.
- ☞ *Form multi-party tourism statistics workgroup:* MOTTA must participate in the working group set up by the Department of Immigration for the execution of the Migration Profiling Project spearheaded by the International Office for Migration. This initiative will examine the requirements that many Government Ministries have of immigration/arrivals data and the adequacy of the existing provision. Participation in this working group will enable MOTTA to explain the weaknesses of the existing data for tourism purposes, particularly in terms of purpose of visit, and feed this into this wider programme of data collection improvement.
- ☞ *Conduct high quality visitor research:* MOTTA will introduce a professionally designed, conducted and evaluated International Visitor Exit and Expenditure Survey, undertaken twice a year on an on-going basis. This survey will be undertaken in association with the Central Statistics Office, the Bank of Zambia, the Department of Immigration and the Zambia Airports Corporation Ltd. As a further step, MOTTA will introduce a Domestic Tourism Survey that is professionally designed, conducted and evaluated and undertake this survey in association with the Central Statistics Office and other concerned stakeholders.
- ☞ *Eliminate bureaucracy and duplication in statistics collection:* MOTTA and ZTA will work together to reduce the statistics-reporting burden on the accommodation sector by combining their respective occupancy and turnover return forms into a single reporting format, which can be used by and sent to both organisations.

- ☞ *Improve skills capacity in tourism statistics and handling:* MOTA, and the statistics department in particular, must work in greater collaboration with the Central Statistics Office, the Department of Immigration and the Bank of Zambia, perhaps using workshops, to exchange technical knowledge and understanding of tourism statistics, tourism concepts, UNWTO definitions and classifications on the one hand and to accept in return, training in wider statistical techniques and data handling. MOTA statistics department will improve their skills and capacities in statistics and data handling while the other Government Agencies will benefit from improved skills and capacities in handling tourism statistics.

### **5.5.4 Improving funding for implementing the tourism strategy**

Effective implementation of this ZTMP will require significant financial investment. Developing tourism as a key complementary and job intensive growth industry will require adequate financial and human resources, and requires a conscious decision by the Government to increase financial support for the sector. The following are key guidelines with regard to enhancing tourism financing:

Actions:

- ☞ *Significantly increase Government budget allocation for tourism:* In addition to the proposed increase in marketing funding for ZTA, Government will significantly increase its investment in implementing the proposals contained in this plan. Government's increased investment in tourism will be through various mechanisms including tax reductions, fiscal incentives and grants allocated to MOTA, ZTA and other tourism related agencies.
- ☞ *Replace the bed levy with a departure tax on air tickets:* The recently introduced 1.5% Tourism Levy from the hotel, conference and events sector to be replaced with a more easily collected and administered \$20 per head Departure Tax which can be incorporated into the cost of all international air tickets. The revenue generated from this tax will be transferred into the Tourism Fund set up to receive the Tourism Levy, to ensure that the monies collected are used for similar purposes to those supported by the Levy. Based on air arrivals recorded in the 2016 statistical report such a levy on the air ticket should be able to raise close to US\$6 million.

# Chapter 6: Tourism Development Area (TDA) Plans

## 6.1 Tourism development planning

### 6.1.1 Need for a planned approach

Attracting more visitors to Zambia will depend on getting a number of factors right – improved access, extending the product range, more facilities, destination marketing, etc. To succeed, tourism development must be grounded in the reality of what the country can support and secondly, must reflect what is unique about what Zambia has to offer.

Zambia's natural resource base confirms that the future direction is eco-tourism in its broadest sense - to include nature based activities (wildlife viewing, trekking, birding), cultural heritage (history, archaeology), hard and soft adventure and special interest holidays and related products – bungee jumping, white water rafting, health and wellness together with select high quality lodge products with appropriate affordable quality accommodation. 'Themed' scenic tour routes will be developed which include site visits to historical, cultural and natural attractions in addition to well-designed visitor interpretation centres and well sited viewing points. Products must also be extended and product possibilities based on Zambia's central position in the region will be developed to attract the conference and business markets.

However, there are challenges. There are a number of factors, which have constrained the realisation of Zambia's tourism potential. As outlined in Chapter 5, they include restricted and inconvenient air access, insufficient destination marketing, limited product offer and non-conducive business environment.

An additional problem is a weakness in implementation of the system of planning and control, resulting in a high level of poaching, wildlife/community conflicts, non-compliance, and unplanned development. This has led to progressive deterioration of the environment in which the tourism sector operates and represents a factor, which, unless addressed, will contribute to an inability to sustain tourism development, let alone the promotion of a quality tourism product for the country. Consequently, there is an urgent need to establish and enforce conservation measures, planning and environmental controls.

There is however, a serious weakness in the organisational structure that is intended to plan for and develop sustainable tourism within Zambia and this reflects the way in which tourism has developed to date. Without an all-embracing structure, tourism planning and development takes place in an ad hoc manner and with little heed to how one development may impinge on either the national objectives or even the performance of another development. The lack of engagement of both public and private sectors within a unified forum sets a stage for a failure to achieve the basic objectives of the tourism industry.

There is therefore a need for:

- Enforceable planning and environmental controls, not only to protect the environment, but also to protect the substantial investments made by developers, as well as tourism marketing investments made by Government.
- Measures to ensure reservation of areas for future tourism development to avoid inappropriate development for short-term gain.
- An understanding by the tourism industry of the complex planning and development procedures through which tourism development proposals must pass and to streamline and assist the development process, complemented by financial and tax incentives.

Although many of the issues above can be set in motion immediately, a long-term approach to development is still required. From a practical perspective, growth in tourism will only be achieved by planning that future. The TDAs put forward in this Chapter thus seeks to:



- Demonstrate feasibility by allowing the market to identify and implement development opportunities, promoting a ‘bottom up’ approach with local authorities and local communities identifying tourism opportunities, while providing a vision of tourism development over a 20 year time frame.
- Demonstrate the benefits of creating a framework to integrate development by providing a clear structure for organising development and responding to opportunities as they arise.
- Provide an overall design approach, creating a sense of place, good development sites in an attractive environment and practical guidelines for sustainable tourism development and operation.
- Protect, strengthen and diversify the existing product, through a better environment for all.
- Demonstrate related economic, social and community benefits, and provide a stimulus to local people’s employment, entrepreneurial activities and investment opportunities.

It is within this context that the following development opportunities have been identified, based upon the assessment of tourism potential highlighted in Section 2.9 of this report.

The level of planning presents the tourism opportunities for each TDA and sets out an overall strategic approach and development guidelines for all major aspects of physical tourism development.

### **6.1.2 Tourism action areas (TAAs)**

TAAs are identified within each of the TDAs. The designation of a TAA implies a coordinated and comprehensive package of initiatives designed to:

- Revitalise economies of TDAs.
- Enable the diversification of its tourism product and strengthen its competitiveness internationally especially through its wildlife product.
- Cater to both the mid-market and upscale, mature markets that can increase value added to the country’s economy.

Other bases for selecting TAAs can include areas primarily earmarked for urban regeneration, conservation and heritage zones, where market development pressures are being felt and a balance between sustaining the local economy and protecting the environment needs to be reached, or where nationally-important developments need to be fast-tracked.

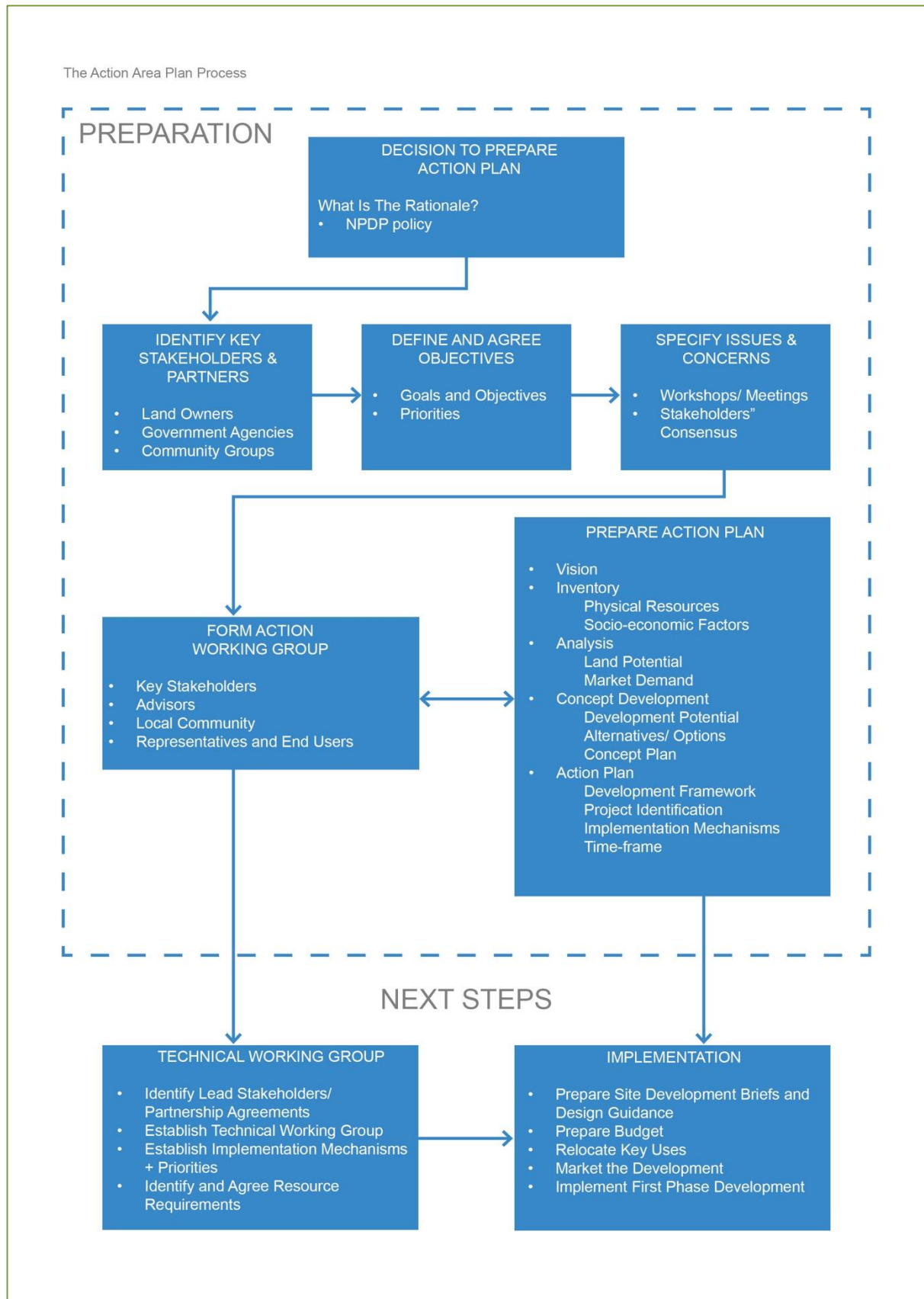
However, the TAA is only one component of the development package. Based on international experience elsewhere, tourism areas are likely to need a combination of:

- Comprehensive and integrated development planning, design and environmental management (IDPs, GMPs for NPs and GMAs).
- Targeted public and private sector investment, including financial incentives and the use of planning agreements in appropriate circumstances.
- Community participation and ownership of resources.
- Excellent marketing.
- Improved management and simplified mechanisms for project implementation.

The TAAs therefore lay down the first steps for future actions on the part of Government. The success however, will be dependent on the commitments and leadership from government and key stakeholders using a partnership approach, together with tourism planning and urban design technical assistance.

A recommended process for developing the TAAs is shown in the following diagram, Figure 6.21.

**Figure 6.21: Recommended process for developing TAAs**



## 6.2 TDAs and TAAs

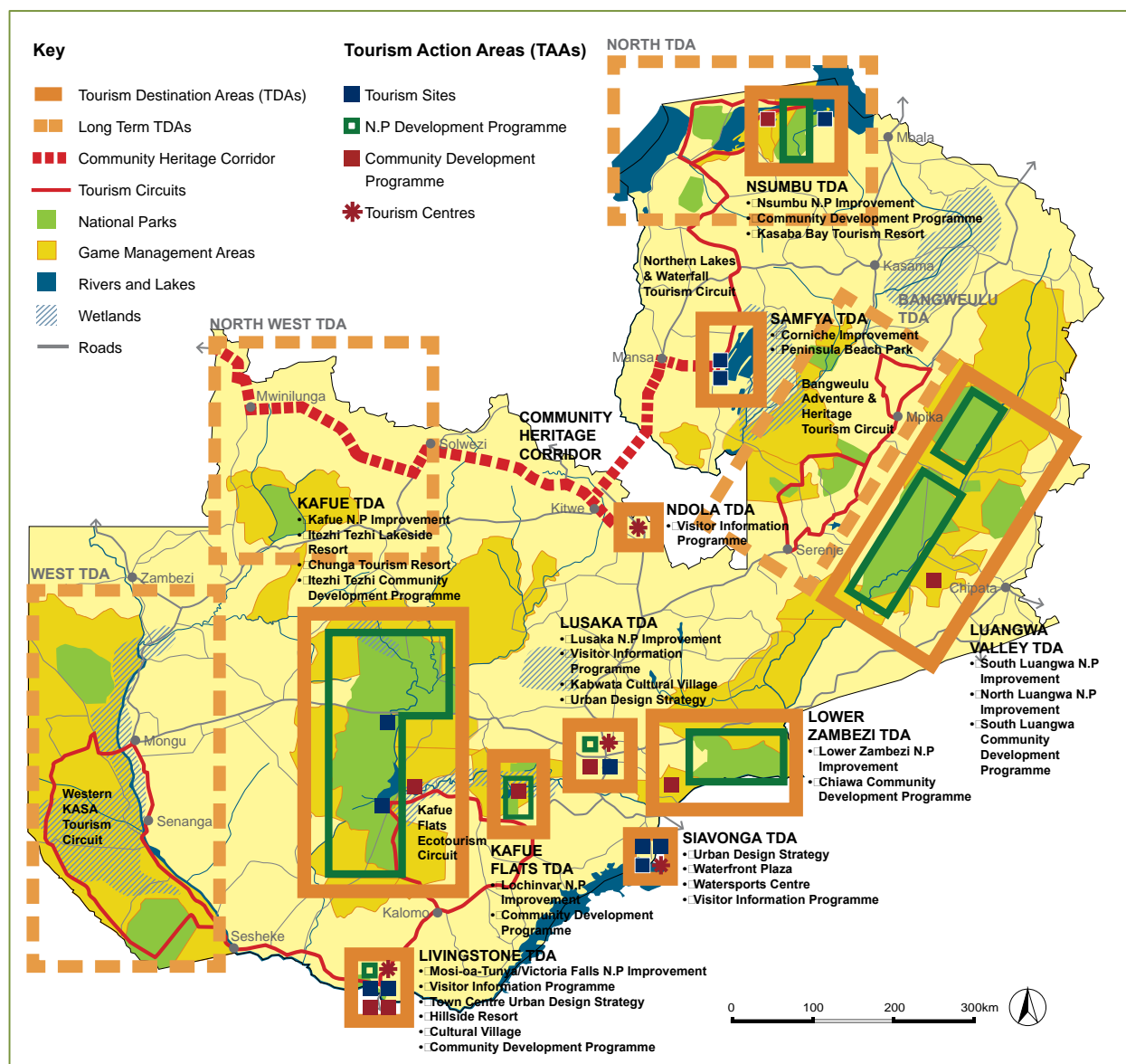
The TDAs and TAAs have been identified through a rapid appraisal of the tourism context, individual site analysis and discussion with both public and private sector stakeholders.

Whilst it is recognised that the following proposals are to assist in increasing the numbers of visitors to Zambia, the projects also have a role to play in improving the product and helping to provide the recreational, social and living environment that will not only encourage new and improved development, but will also be for the benefit of the local community.

TAAs have been developed for each of the TDAs. These will require more detailed attention, as well as development briefs. A degree of flexibility must be maintained so it is not within the capability of these TAAs to specify exactly how each project will be implemented, however, they help to visualise how the areas can be developed.

Sustainable Tourism Development Guidelines in Annexure B support the development of TAAs and act as a checklist for planners, developers, operators and resource managers in the promotion of a quality sustainable tourism product.

**Figure 6.22: Tourism Structure Plan**



## 6.2.1 Lusaka TDA

### 1. Existing Situation

Lusaka has been the capital of Zambia since 1935, it is the site of Government and location of the State House, home to more than 50 Diplomatic Missions and almost a fifth of the nation's population. The city grew up around the railway station and along nearby Cairo Road, the original core shopping and business district, but the city has expanded eastwards where more space has enabled 'urban sprawl' to characterise development. This expansion has enabled the building of several out of town shopping malls which are now threatening the commercial life of the original city centre while expansion has also been accompanied by major traffic congestion, particularly at peak times, a car parking problem and the appearance of many vacant plots which detract from the city's appearance.

Lusaka's central location in Zambia makes it accessible to and from the rest of the country by road while its international airport is the nation's largest, with major rehabilitation works planned and a new international terminal building under construction, but despite being connected to regional and continental African capitals, it has only one direct link to a destination beyond Africa, Dubai.

The capital city has limited international leisure tourism appeal at present; however, it is home to the National Museum, the Kaunda House Museum, the Kabwata Cultural Centre and several colourful street markets while just outside the city are located the Munda Wanga Botanical Gardens and Wildlife Sanctuary and the recently created Lusaka National Park. The TDA for Lusaka thus covers the city centre and extends towards the south east to include the new Lusaka National Park. Lusaka also has two well regarded 18 hole golf courses which have now been joined by a third, a recently opened international championship standard course that will form part of a major new golf and conference resort hotel complex due to open in a couple of years' time.

Lusaka's principal tourism appeal is therefore more focussed upon the international and domestic business and MICE markets which are supported by the Mulungushi and New Government conference centres and the presence of a wide-ranging supply of accommodation covering international branded hotels, local hotels and lodges.

### 2. Development Potential

#### *Overall goal*

To develop Lusaka to become a key African conference city and business destination supported by local culture and entertainment.

#### *Market Mix*

- Primary Markets
  - International and domestic MICE market
  - International and domestic business market
- Supporting Markets
  - International leisure markets in transit
  - Domestic short break market

#### *Indicative number and style of new rooms required to meet demand by 2038*

- 4,000 rooms @ 4-5 Star standard in 15 hotels of 200-300 rooms each for MICE and business markets.
- 3,000 rooms @ 3 Star standard in 30 hotels of 100-150 rooms each for MICE, business and leisure markets.
- 3,000 rooms @ 2 Star and budget standard in 70 Hotels of 30-70 rooms each for budget business and leisure markets.

#### *Key Assumptions*

- Construction of the proposed new conference and exhibition complex at the existing

Mulungushi conference venue site.

- Setting-up of a professional and well-funded National Conferences and Exhibitions Bureau.
- Improved appearance and management of the environment and urban fabric of Lusaka.
- Improved entertainment, night life, shopping and local cultural experiences in the city.

### **3. Key Issues**

Before Lusaka can achieve its true potential as an African conference city and stop over tourist destination, seven key issues need attention:

- Product improvements and packaging of the various attractions such as the heritage trail, as well as clear sign posting and easily available local information, will need to be put in place. It is the blend of things to see and do that is important.
- The range and quality of shops, particularly along Cairo Road needs to be improved. The city centre is being threatened by out of town shopping centres. One way to respond is to compete on different terms making shopping a special experience with outdoor cafes and new products such as internet cafes and street furniture.
- Limited entertainment/night life and places to experience local culture in a quality environment.
- Housing is an important component of a strong centre economy. It will be necessary to improve and strengthen the residential downtown community.
- Major traffic congestion, especially at peak times. Car parking and traffic circulation is a particular problem. Solutions have to be found on how to limit the use of cars, reduce congestion, discourage long term parking and promote public transport.
- The city centre does not have an urban park or square. Every opportunity should therefore be taken to introduce more greenery into the city.
- Proper investment in everyday infrastructure makes good sense in an economy that cannot afford the luxury of frequent replacement of inferior materials. But improving the urban environment and making the centre attractive does not just require townscape and landscape improvements, new buildings need to be in scale and character and existing buildings upgraded by removing eyesores such as advertising and improving facades.

### **4. Tourism Action Areas**

The city is therefore in need of urban regeneration tackling issues such as urban sprawl, traffic congestion and lack of tourism product.

In support of tourism development, four TAAs are proposed:

1. Lusaka Urban Design Strategy
2. Kabwata Cultural Village
3. Lusaka National Park Improvement Programme
4. Lusaka Visitor Information Programme

Figure 6. 23: Lusaka TDA



### 1. Lusaka Urban Design Strategy

The problems of Lusaka’s urban centre cannot be solved just by ‘cleaning up’ the area. Urban design is a critical ingredient for the process of urban regeneration and therefore any proposed townscape improvements will have to be seen in the context of an overall, long term, urban development strategy.

The Strategy should be conceived as part of the wider set of economic and planning objectives of the proposed Lusaka Structure Plan. The purpose therefore, will be to present a robust, coherent, apolitical vision of how the physical environment can be gradually improved over the next 20 years as opportunity for change occurs. The proposals, which flow out of the Strategy, will be accompanied by detailed action plans, which set out a step by step programme for implementation.

For example, hotel development sites will need to be identified to accommodate the projected 10,000 rooms by 2038. These properties will include the full range of standards from 2 to 5 star rating. The identification of these sites however, must be planned in the context of new themed urban development areas (possible arts quarter, heritage quarter), urban regeneration (mixed use and higher density areas) and sustainable transport (bus and in the longer term, LRT).

Lusaka Municipality will therefore need to:

- Promote the development of urban tourism areas within Lusaka’s urban centre as the focus for further growth with a strong emphasis on urban regeneration, enhancing the historical and urban environment and addressing dereliction and vacant sites.

- Promote the rehabilitation and upgrading of run-down parts of the urban area through the rehabilitation and re-use of buildings no longer required for their original purpose.
- Promote public transport, walking and where possible cycling, and guide tourism development to locations that are accessible by a choice of means of transport.
- Promote mixed-use development to include hotels, recreational and leisure facilities, museums, theatre halls, cinemas, all well served by public transport.
- Promote the provision of passive and active recreational space such as gardens, pocket parks, informal landscaped areas and new tree planting.
- Promote the identification and creation of a network of linear parks in Lusaka which link open spaces, squares, small pocket parks, green landscape and water features.

A key action will be to upgrade Cairo Road to provide and maintain a physical setting, which is inviting for tourists and local residents. It is the basic environmental infrastructure that sets the tone, creates first and lasting impressions and can act as a catalyst for economic regeneration positioning Lusaka as a key African conference city supported by local culture and entertainment.

*See Guidelines:  
Urban Design*

## **2. Kabwata Cultural Village**

The Village is one of Lusaka's tourism attractions. It is run by the Kabwata Visual Arts and Cultural Association and is home to around 70 woodcarvers and artists selling a variety of beads, drums, spears and printed fabrics from small huts. The huts surround an amphitheatre where traditional dancers occasionally perform. A traditional restaurant serves Zambian dishes.

The Village has not yet succeeded as a quality heritage tourism product. While considerable effort has been invested in establishing the Village, it has not generated the anticipated visitation. There are many reasons for this that include:

- Poor layout/circulation of the huts, which does not encourage a fair selling platform.
- Run down amphitheatre, which is hardly used.
- Car parking situation with limited off street parking resulting in vehicles allowed to park within the village itself.

A regeneration strategy is required to include:

- Creating a centre for displaying and selling high quality and authentic Zambian crafts so that the Village becomes known as 'The' place to find authentic arts and crafts.
- Engaging in joint venture programming with cultural organisations to provide animation and put on events that draw both visitor and domestic markets.
- Offering unique restaurant experience featuring traditional Zambian foods, with extensive interpretation of ingredients, recipes and traditional uses and menu items.

This will help to position the Village to offer a distinctive and interesting experience while at the same time increasing awareness and appreciation of Zambia's arts and culture.

A rehabilitation programme is proposed to include a smaller amphitheatre, reorganisation of the huts to allow for better circulation with the entrance to the amphitheatre and restaurant at the far end of the site. Car parking will be off site. Entrance will be through a traditional landscaped garden to provide passive recreation and outdoor exhibitions. The key to success of the Village however will be its programming.

*See Guidelines:  
Site Development Planning*

### ***3. Lusaka National Park Improvement Programme***

The Park is located to the south east of the city, established in 2011 and officially opened in 2015. It is Zambia's smallest park, previously a forest reserve. A GMP was prepared in 2012 with the intent to develop the park to include a safari lodge with conference facilities, bush camps, picnic sites, game viewing roads, foot trails and signage. To date, the few roads that have been developed are poorly maintained. However, the Park currently holds two white Rhino and some 200 sables as part of a restocking exercise. Poaching in the Park is a concern.

In the near future, it is unlikely there will be a market for the safari lodge/conference centre and therefore it is proposed that the Park be repositioned as an educational and research centre to include animal rehabilitation and sanctuary. The Improvement Programme will therefore focus on integrating tourism development within the GMP. The intention will be to maximise the carrying capacity of the Park by creative marketing, educational packages and providing visitor facilities, imaginative presentation and lots of interpretation.

The improvement programme will include:

- Main gate and information/interpretation centre
- Animal research/rescue centre
- Safari bus and game tracks
- Water holes and hides
- Nature trails, observation towers, lookouts
- Children's camp site and adventure centre
- Signage and interpretation throughout the Park

*See Guidelines: Site Development Planning*

### ***4. Lusaka Visitor Information Programme***

Although the tourism heritage value of Lusaka is very special, the individual heritage sites on offer, for the most part, are not sufficiently strong attractions in themselves. There is therefore the need for integration, both in delivering product experiences and raising awareness about and promoting value of exploring and discovering Lusaka's tourism product.

Furthermore, a well-co-ordinated visitor information package would help visitors to find their way to a variety of other interesting shopping and nature sites, enabling them to learn more about and fully appreciate Lusaka's historic and cultural resources.

Every visitor to Lusaka comes with his or her personal preferences and interests. Wildlife visitors will prefer a cursory look at the city. Others will wish to learn more about Zambia's history and appreciate its heritage. But most visitors work hard to find comprehensive information on Lusaka's tourism sites.

The intent of this Programme is therefore to:

- Significantly increase awareness concerning the rich heritage, shopping and nature based opportunities.
- Establish a set of touring products which are emphasised in marketing lure pieces and an 'official guide' to heritage and nature based tourism in Lusaka (thereby making it easier for visitors).

Three tours have been identified for promoting the 'discovery experience'. These can be taken individually, part of a tour group or via a city bus tour:



- Heritage based tour – a trail that traces the history of Zambia providing an integrated set of experiences at several heritage sites including National Museum, Presidents Burial Site, Kaunda House and other heritage houses and new attractions
- Cultural based tour – a trail focussing on traditional arts and crafts to include Kabwata Cultural Village, Kamwala Market, New City Market and Cairo shopping street.
- Nature based tour – a focus on the improved Lusaka National Park and the much needed upgraded Munda Wanga Botanical Gardens and Wildlife Sanctuary.

Community development sites and programmes may also be included in the discovery experience which will result in positive economic benefits to the communities and leave visitors with a better understanding of the significant heritage of Lusaka and Zambia as a whole.

The infrastructure required to implement the Visitor Information Programme includes:

- Route identification – special signage that is distinctive and themed. The signage serves two purposes: (1) to provide directional signage for the independent visitor and (2) to strengthen awareness of the project.
- Information Panels and Smart App – distinctive interpretive panels installed at all sites and linked to smart phone applications.
- A Discovery Experience Map and Smart App – distributed free at all hotels, schools etc. This map/app will highlight the variety of experiences, not only heritage and nature sites but also communities and services.
- Discovery Experience Hotline/Smart App – an information telephone number and application to assist visitors to select routes and sites. This will increase the visitor experience and provide valuable information service for both international and domestic visitors.

A tourism visitor centre is proposed which will be the focus for the Visitor Information Programme. The centre will be located within the National Museum and will not only promote Lusaka, but also the heritage, nature and community sites within each of the TDAs.

*See Guidelines:*

*Site Development Planning*

*Community Action Planning*

**Table 6.9 Lusaka TDA 5 year action plan**

TAA	Activity	Responsibility		US\$ 000's
		Lead	Support	
Urban Design Strategy	Planning and design/input to Lusaka land use/transport plan Say 3 m/m	MoTA	Municipality of Lusaka	55
Kabwata Cultural Village	Planning, design and project dossier Say 1 m/m Architecture and 1 <sup>st</sup> phase site works	MoTA	Municipality of Lusaka	30
Lusaka NP Improvement	Planning, design and project dossier/input to GMP. Say 2 m/m Architecture and 1 <sup>st</sup> phase site works	MoTA	DNPW	40
Visitor Information Programme	Planning, design and project dossier Say 2 m/m Graphics and 1 <sup>st</sup> phase site works	MoTA	ZTA	40

## 6.2.2 Livingstone TDA

### 1. Existing Situation

Livingstone is the primary entry point for international leisure tourism visitors to Zambia and has become the nation's most significant tourism destination due to its immediate proximity to the Victoria Falls, one of the world's largest waterfalls and most well-known natural wonders.

The Falls have been declared a World Heritage Site due to their unique geological features and their outstanding natural beauty and they represent a considerable tourism resource for both Zambia and Zimbabwe who share this natural attraction and the river Zambezi that flows over it. Visitors are not limited to viewing the Falls from the safety of the nearby riverbanks but can enjoy helicopter, micro-light and light aircraft tours, canoeing, white water rafting, kayaking, river cruises and bungee jumping, over and in close proximity to the heritage site, provided by numerous tour companies that are keen to develop the town as the adventure capital of the country.

Livingstone was established in the early 20<sup>th</sup> century beside the new railway connecting the Copperbelt in the north with the coal mines south of the Zambezi and became the capital of the then Northern Rhodesia. A number of old heritage buildings from the Colonial period still remain from this era and they represent a cultural heritage characteristic of the town alongside the Livingstone Museum, the Railway Museum and the small Jewish Museum, all of whom need greater attention for their potential. Indigenous Zambian cultural heritage and performing arts are presented in the Mukuni cultural village and the Maramba (government) cultural centre.

The Mosi-oa-Tunya National Park which follows the banks of the Zambezi is the smallest yet most economically valuable of all the Zambian parks, it does offer a limited wildlife visitor experience, animal encounters and horse riding to add to the adventure and cultural activities already on offer.

International visitors either arrive by air through the recently re-built Harry Mwanga International Airport using its direct flight connections with international carriers to regional capital cities such as Johannesburg, Nairobi, Gaborone and Addis Ababa or come by road from Victoria Falls in Zimbabwe or via the ferry crossing at Kazungula with Botswana which will be much improved by the bridge now under construction. Road access in and around Livingstone is good as is road access to Lusaka but the road from Kazungula to Shisheke, connecting with Namibia is poor.

Livingstone is the centre of Zambian leisure tourism attracting both international and domestic markets, including day trippers from Zimbabwe but it also attracts the business and conference tourism sectors. The accommodation sector includes several upmarket lodges along the Zambezi, a small number of larger international and local branded hotels and numerous smaller hotels, guest houses and backpacker establishments.

### 2. Development Potential

#### *Overall Goal*

Develop the city as a world class destination area and the best place for experiencing the Victoria Falls, thereby reinforcing the identity of Livingstone as a hub for tourism in the country.

#### *Market Mix*

- Primary Markets
  - International leisure markets
  - International and domestic MICE market
  - Domestic short break market
- Supporting Markets
  - Domestic business market
  - International day trip market from Victoria Falls town

### ***Indicative number and style of new rooms required to meet demand by 2038***

- 3,000 rooms @ 4-5 Star standard in 10 hotels of 300 rooms each, split between the conference and meetings market and the integrated leisure resort market.
- 5,000 rooms @ 3-4 Star standard in 100 hotels/lodges of 50 rooms each in attractive natural settings with some, perhaps, with river views.
- 2,000 rooms @ 2-5 Star standard in 100 hotels/lodges of 20 rooms which will be in diverse locations covering attractive river front settings, suburban plots, city centre infill and backpacker locations.

### ***Key Assumptions***

- Improved visitor viewing experience and interpretation at Livingstone Falls Park and Livingstone Wildlife Park.
- Improved appearance and management of the environment and historic urban fabric of Livingstone.
- Improved entertainment, night life, shopping and local cultural experiences in Livingstone.

### ***3. Key Issues***

The TDA has tremendous potential, but it also has many problems. Key issues are identified which, if they remain un-tackled, will be a severe constraint to development opportunities, namely:

- Zambia's greatest flow of visitors come from the Zimbabwe side of the Falls, mainly coming for day trips. The challenge is to draw visitors to the town (and beyond), get them to stay longer and spend more.
- Limited 'mid-market' capacity. Most accommodation is either high-end (\$200 >) or budget level (>\$60)
- Limited good restaurants apart from hotels and lodges.
- Limited entertainment/night life and places to experience local culture in a quality environment
- The border crossing is tedious and bureaucratic. There is a need for improved cross border coordination to ensure better facilitation of visitors.
- Livingstone town lacks clear identity. The image is of car and truck parking along main streets.
- Truck weighbridge in the town leads to congestion, major traffic bottlenecks and takes up prime development space. Trucks also contribute to environmental pollution.
- Threat of inappropriate 'big wheel' development proposed next to the Falls.
- Hydro Power at Victoria Falls is being replaced by Hydropower at the Gorges – this may affect the falls themselves.
- Some historical architecture, however mostly neglected.
- Limited tourism and road signage.

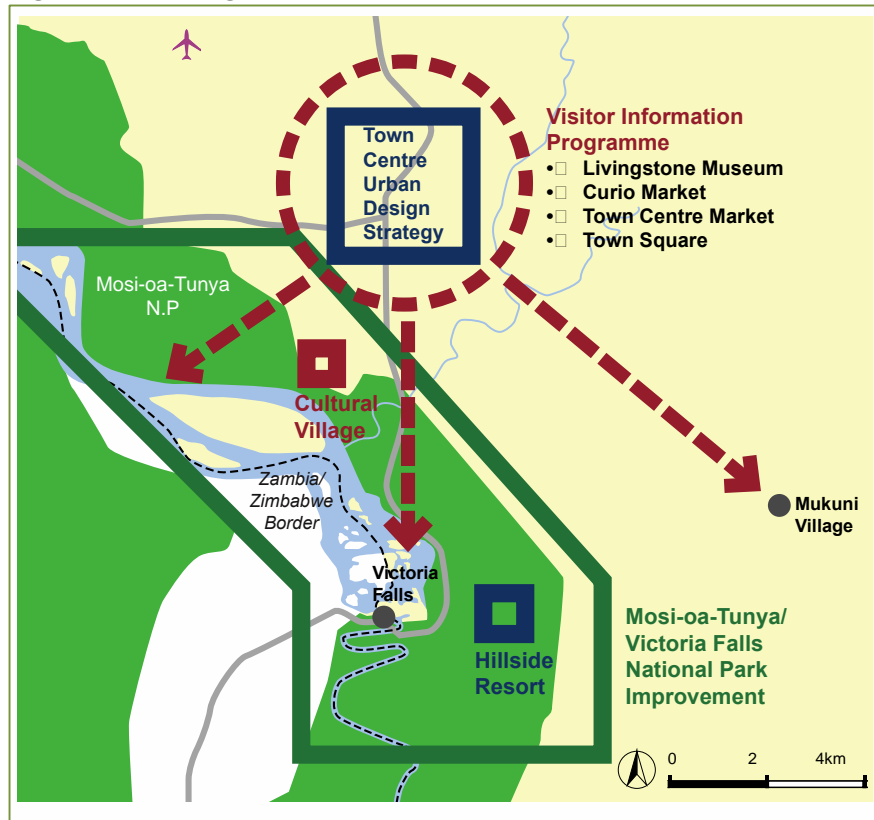
### ***4. Tourism Action Areas***

The challenge will be to attract more visitors to the town and tourism sites, get them to stay longer and spend more.

Six TAAs are proposed:

1. Livingstone Town Centre Urban Design Strategy
2. Mosi-oa-Tunya National Park Improvement Programme
3. Maramba Cultural Village
4. Livingstone Hillside Resort
5. Livingstone Visitor Information Programme
6. Livingstone Community Development Programme

Figure 6.24: Livingstone TDA



### 1. Livingstone Town Centre Urban Design Strategy

There is a need for a comprehensive, co-ordinated and concentrated effort to achieve the town's true potential and create a physical setting which is visually interesting, distinctive and a comfortable pedestrian environment, encouraging visitors, both locals and tourists, to stay longer and spend more.

The starting point needs to be not only a shared vision in terms of a commitment on the part of the main stakeholders to improving the area, but also an objective analysis and diagnosis of the problems, and what should be done. Community action planning will be used as part of the public participation programme. The concept is to provide the local community of Livingstone with the opportunity to make its feelings and fears, hopes and aspirations known to Government. The opening of new hotels and guest houses, attractions such as restaurants, street cafes, bars and entertainment in the evening, together with its historical architecture and cultural events, can help the town capitalise on its unique assets.

Urban design initiatives will include:

- Providing a focus of activity in the town by creating a 'square/green' next to the post office (this can be used for events).
- Upgrading the park by the curio market - a possible Dr David Livingstone memorial park (introduce landscaping/seating etc.);
- Reinforcing the landscape along the main high street (emphasise the 'green' image of the town);
- Upgrading of Chishimba Falls Road from the junction with Mosi-oa-Tunya Road to the Railway Museum.
- Organising car parking.
- Providing new opportunities for rehabilitation of historic buildings, particularly along the high street (possible capital base for low interest loans for a 5-year programme for façade restoration).
- Identifying new sites for hotel and guest house development.
- Removing prominent eyesores such as advertising, which blocks views and important buildings.
- Improving shop fronts and encourage 'living over the shop'.

- Improving the setting of the market place.
- Introducing simple street fixtures and furniture.

Individual projects are likely to include:

- Upgrading of both the Livingstone Museum and Railway Museum.
- Introducing a transport link between the two museums (historic replica of railway buggy, horse drawn cart etc.).
- Introducing a transport link between the Falls and the town (in the first instance this could be a regular bus painted in special graphics to run in partnership with the steam train).
- Upgrading the tourism visitor centre possibly incorporated into the Livingstone Museum.
- Redeveloping the existing golf course to include real estate and recreational facilities.

Mixed use development must be encouraged to promote the sustainability of the town by making the urban area a more attractive place to live, improve the vitality and viability of the centre by increasing use during the day and evening and create a variety of different buildings and spaces which will contribute to the visual interest and preserve and enhance the town's historic and cultural heritage.

A major project under consideration is a bypass and car park for truck traffic to alleviate environmental impacts in the town. This will involve relocating the Truck Weighbridge west of the town. Two possible options exist for the bypass: (1) a short by pass from Nakatindi Road around the urban area, and just south of the airport. (2) a more ambitious link further west, bordering the forest area and joining the Great North Road to the north of the town.

The aim of this Urban Design Strategy will therefore be to pull all the individual projects and initiatives together in an overall programme.

*See Guidelines: Urban Design*

**Figure 6.25 Figure 6.5: Livingstone bypass options**



## ***2. Mosi-oa-Tunya National Park Improvement Programme***

A Joint Integrated Management Plan for the park has recently been prepared (2014 - 2018). The plan sets out the key objectives and long-term vision for the management of the Park and the justification for inscription on the UNESCO World Heritage List.

Although the main attraction of the Park is the Falls, the presentation of this major attraction is in need of rejuvenation, particularly in the light of increasing competition from neighbouring Zimbabwe. Certain principles however must be regarded as essential to both maintain the integrity of this significant resource while offering quality experiences to the visitor.

The principles are:

- From a tourism perspective, one must design and develop the site to offer an ‘experience’ for the visitor. It is not just a matter of developing the tourism product. The most important design consideration is the quality of the experience offered.
- The experience offered must not compromise the integrity of the resource and must impart a sense of respect for the resource through site treatment and the interpretation of activities.
- The experience must also consider the needs of the visitor ancillary services, again without compromising the integrity of the resource.

Within this context, the following projects are recommended to enhance the tourism experience of the Park.

### ***Livingstone Falls Park***

- Removing car parking from the entrance to the Park thereby the creating a pedestrianized ‘square’ as a focus for visitor centre, retail and presentation facilities.
- Interconnected high level walkways to maximise views of the Falls and provide for picnicking and shaded sitting areas.
- Restaurant within the decking to offer and interpret authentic Zambian cuisine.
- Key lookout/photographic points and towers with information panels.
- Improved signage and interpretation throughout the park.

### ***Livingstone Wildlife Park***

- Main gate and information centre.
- Transport link to connect the Livingstone Falls Park and town.
- Upgraded game tracks and parking areas.
- Picnic areas, observation towers, lookouts and hides.
- Improved signage and interpretation throughout the park.

The Improvement Programme will focus on integrating tourism development with the GMP for the Park. The intention will be to maximise the carrying capacity by creative marketing, educational packages and providing visitor facilities, imaginative presentation and lots of interpretation.

*See Guidelines:*

*Site Development Planning*

## ***3. Maramba Cultural Village***

The village is located along Sichango Road and offers traditional dances by the Zambia National Dance Troupe at the weekends. A recent fire has destroyed most of the village huts where local crafts used to be exhibited.

A regeneration strategy is required to include:

- Creating a centre for traditional dances so that the Village becomes known as ‘The’ place to find authentic traditional dancing. The existing National Dance Troupe however must be privatised and become profitable.
- Creating a centre for displaying and selling high quality and authentic Zambian crafts including an active programme of interpreting folk culture in Zambia.
- Engaging in joint venture programming with cultural organisations to provide animation and put on events that draw both visitor and domestic markets.

This will help to position the Village to offer a distinctive and interesting experience while at the same time increasing awareness and appreciation of Zambia’s arts and culture.

Specific projects include:

- Rebuilding of traditional huts. Landscaping will provide a buffer between individual huts.
- Provision will be made for a restaurant to be positioned to offer traditional Zambian cuisine. This can then be marketed as one of the features of the site.
- The entrance and parking area to be landscaped and designed to accommodate buses and anticipated larger numbers of visitors. The car/bus park maybe linked with the adjacent Show Ground site for public events.

The key to the success of the Village will be to balance its dual role as a living history site and a showcase for Zambian crafts. The living history element will interpret not only dance but also the life-ways of the working Zambian, demonstrating their traditional artisan and craft activities. One of the huts will be furnished as a residence; another will house an interpretative exhibit and a third as a possible blacksmith’s shop. Others will be used as retail outlets. Traditional village activities (e.g. cooking, music, gardening, storytelling) will be enacted for visitors at fixed times. Some crafts will be produced on site.

*See Guidelines:*

*Site Development Planning*

#### **4. Livingstone Hillside Resort**

Nine Tourism sites have been identified in the ‘Zambia Guide to Investment Opportunities’, totalling over 2,000 hectares. Given the room projections for the year 2038 reaching 10,000, all these sites will be required.

The Hillside Resort has potential to include a 300 room 5 star resort/spa/conference facility with extensive views over the Falls, around 500 residential lots, shopping/commercial centre, tennis academy and horse stables/trails.

Feasibility studies and a site development brief will be required to:

- Specify development land parcels for different uses.
- Assess market demands.
- Define development potential, densities and constraints.
- Incorporate design guidelines and illustrations.
- Develop implementation strategies in conjunction with tourism investment inputs.

To entice investment and give confidence to the private sector, public sector investment in the above TAAs must be seen to be taking place.

*See Guidelines:*

*Site Development Planning*

## ***5. Livingstone Visitor Information Programme***

Although the tourism heritage, nature and community value of Livingstone is very special, apart from the Falls, the individual sites on offer, for the most part, are not sufficiently strong attractions in themselves. There is therefore the need for integration, both in delivering product experiences and raising awareness about and promoting value of exploring and discovering Livingstone's other tourism products enabling visitors to learn more about and fully appreciate Livingstone's historic and cultural resources.

Most visitors to Livingstone come to view and experience the Falls. The intent of this Programme is therefore to:

- Significantly increase awareness concerning the rich heritage, shopping and nature based opportunities in Livingstone.
- Establish a set of touring products which are emphasised in marketing lure pieces and an 'official guide' to heritage, nature and community based tourism in Livingstone.

Three themed tours have been identified for promoting the 'discovery experience':

- Heritage based tour – a trail that traces the history of Zambia providing an integrated set of experiences at several heritage sites including visits to the different museums; and a historic house tour of the residential district.
- Cultural based tour – a community based tourism trail that includes visits to local homes to learn about Zambian life-ways; and visits to Mukuni cultural village and Maramba Cultural Village.
- Nature based tours – to include a wildlife/educational experience within the Mosi-oa-Tunya National Park and a forest/educational experience (system of short interpretive trails) within the Camawa Forest Reserve.

Community development sites and programmes may also be included in the discovery experience which will result in positive economic benefits to the communities and leave visitors with a better understanding of the significant heritage of Livingstone and Zambia as a whole.

The infrastructure required to implement the Visitor Information Programme includes:

- Route identification – special signage that is distinctive and themed. The signage serves two purposes: 1) to provide directional signage for the independent visitor and 2) to strengthen awareness of the project.
- Information Panels and Smart App – distinctive interpretive panels installed at all sites and linked to smart phone applications.
- A Discovery Experience Map and Smart App – distributed free at all hotels, schools etc. This map/app will highlight the variety of experiences, not only heritage and nature sites but also communities and services.
- Discovery Experience Hotline/app – an information telephone number and smart phone application to assist visitors to select routes and sites. This will increase the visitor experience and provide valuable information service for both international and domestic tourists.

A tourism visitor centre is proposed which will be the focus for the Visitor Information Programme. The centre will not only promote Livingstone, but also the heritage, nature and community sites within each of the TDAs.

*See Guidelines:*

*Site Development Planning*

*Community Action Planning*



## 6. Livingstone Community Development Programme

Implementation of the Livingstone Visitor Improvement Programme will not be enough in itself, to ensure local community involvement in tourism. Currently, local communities are not ready or prepared to take full advantage of this opportunity at this time. The community consultations conducted revealed several areas in which communities need support in order to effectively participate in the tourism sector.

These include:

- Facilitation to assist local communities in determining how and under what conditions they may wish to participate in tourism projects that may be appropriate and sustainable for them to pursue, and the implementation of project ideas in a manner that will ensure sustainability.
- Support for the product development process including how to prepare business plans and feasibility assessments, finance projects, implement projects, set-up management structures and market and operate projects.
- Training in product development areas as well as hospitality training.
- Assistance to integrate marketing activities with those of the country marketing programmes.
- Facilitation to link local communities with existing programmes to support tourism participation.
- Adaptation of existing community development, economic development and training programmes to accommodate the needs of local communities in this regard.

This level of facilitation is essential. One of the initial challenges will be to increase awareness of the tourism potential through existing CRBs and assist them, where necessary, to establish working organizations with whom to interact on community tourism planning. In addition, the process must also accommodate the interests of individuals in local communities who may wish to pursue particular tourism projects or businesses. The needs identified above are equally applicable to communities generally and to individuals within communities.

The Livingstone Visitor Information Programme offers significant opportunity to increase local benefits from tourism development. The Community Action Planning Guidelines will provide the local community with the opportunity to make known its feelings and fears, hopes and aspirations, suggestions and preferences to Government and to develop a range of sustainable projects.

*See Guidelines: Community Action Planning*

**Table 6.10: Livingstone TDA 5 year action plan**

TAA	Activity	Responsibility		US\$ 000's
		Lead	Support	
Town Centre Urban Design Strategy	Planning, design and project dossier/input to Livingstone IDP Say 3 m/m	MoTA	Municipality of Livingstone	55
Mosi-oa-Tunya NP Improvement Programme	Planning, design and project dossier/input to GMP. Say 3 m/m Architecture and 1 <sup>st</sup> phase site works	MoTA	DNPW	55
Maramba Cultural Village	Planning, design and project dossier Say 1 m/m Architecture and 1 <sup>st</sup> phase site works	MoTA	Municipality of Livingstone	30
Hillside Resort	Concept/pre-feasibility study, development brief and investment package Say 3 m/m	MoTA	ZDA Municipality of Livingstone	65
Visitor Information Centre	Planning, design and project dossier Say 2 m/m Graphics and 1 <sup>st</sup> phase site works	MoTA	ZTA	40
Community Development Programme	Workshops and assistance. Say 6 m/m	MoTA	CRBs	95

## 6.2.3 Kafue TDA

### 1. Existing Situation

The TDA contains Kafue National Park, Zambia's oldest park and at 22,400 sq. km. is one of the biggest wildlife sanctuaries in the world. A park of this size offers geographical variety and important features include the Busanga Swamps wetland and the seasonally inundated Busanga Plains in the remote far north, the permanent Kafue river flowing through the park to Lake Itezhi-Tezhi, a large manmade lake in the south of the park built in the 1970's to regulate water levels and to provide a dam for a hydro-electric power station and finally, the Nanzhila Plains area at the southern reaches of the sanctuary.

Wildlife has been substantially reduced since the 1980's due to poaching although greater effort has been made more recently to tackle this and some improvement in wildlife numbers is being seen. The surrounding GMA's have unfortunately not been effective yet the best wildlife viewing, concentrated in the plains of Busanga and Nanzhila, can be very good and the park offers a quality wilderness experience not widely available elsewhere in the country.

The Park's poorer accessibility, infrastructure and wildlife population has kept visitor numbers comparatively lower in recent years and thus the Park currently offers a less crowded visitor experience, however there is an even distribution of mainly high-end lodges within the Park, usually located along the Kafue and Lufupa rivers, with lodge operators offering walking safaris, special interest birding and fishing trips and more traditional vehicle and water-borne game drives. Lion, leopard, wild dog, buffalo and elephant are the most likely wildlife the visitor will encounter. Surrounding GMA's offer game hunting.

Kafue National Park attracts mainly international higher-end leisure tourists to the northern and middle zones while around Lake Itezhi-Tezhi to the south, there is some budget accommodation, again attracting the international higher-end leisure tourist markets. The Kafue River and the Itezhi-Tezhi Dam provide an essentially undeveloped tourism asset, especially for sport fishing and angling.

Road access to the park is poorer from Livingstone than from Lusaka, which is linked via the M9 Great West Road to Mongu that bisects the park. This road benefits the northern areas of the park particularly but access off this road to Itezhi-Tezhi, further to the south, is poor. From Livingstone, road access to the park from Kaloma, on the trunk road to Lusaka, via the southern entrance gate at Dumdumwezi is poor, although there are plans in place for upgrading this route and to improve the connection through to Itezhi-Tezhi and onwards to the M9 Lusaka road. Road access within the park is limited with very few game loops having been created while road access to the surrounding GMA's is also limited.

Air access is currently available only by charter via seven airstrips around the park including all-weather access at Ngoma, Ghunga and Lufupa where plans are being made to introduce scheduled flights.

### 2. Development Potential

#### *Overall Goal*

Develop Kafue offering a range of safari and outdoor experiences from affordable to exclusive without compromising the park as a world-class destination area with Itezhi-Tezhi being developed in a more intensive and commercial manner while keeping the integrity of the resource.

#### *Market Mix*

- Primary Markets
  - International exclusive safaris
  - International packaged explorers
  - International eco-tourists
- Supporting Markets
  - International intrepid explorers
  - International adventure/sports
  - Domestic short break market

### ***Indicative number and style of new rooms required to meet demand by 2038***

- 2,400 rooms @ 3-4 Star standard in 8 large scale integrated resort style developments of 300 rooms mostly wrapped around two lakeside promontories at Itezhi -Tezhi.
- 2,100 rooms @ 3-4 Star standard in around 40 hotels/lodges of 50 rooms in natural or waterfront locations mostly around Itezhi Tezhi and Chunga.
- 500 rooms @ 4-5 Star standard and some boutique style operations in 50 lodges/camp sites of 10 rooms in memorable and secluded natural settings distributed around both North and South Kafue.

### ***Key Assumptions***

- Completion of upgraded road connections to enable swift and comfortable road access from Livingstone and Lusaka to Itezhi Tezhi and the Southern Kafue.
- Introduction of scheduled air services to Ngoma airstrip.
- Agreement to introduce a wildlife restocking programme.

### **Key Issues**

Key issues include:

- Poaching especially from the west is a major challenge – a Special Anti-Poaching Unit has recently been set up, but needs to encourage further involvement of communities in conservation.
- Over development of fishing in Itezhi Tezhi lake.
- The present infrastructure in the area is inadequate. Park infrastructure and facilities have deteriorated over the years due to inadequate funding and operational problems.
- Roads will need to be upgraded from Lusaka and Livingstone and an all-weather leisure drive along the river developed to give access to future lodges and camps.
- No scheduled flights to southern part of park.
- Conflict between hunting and non-consumptive tourism in the Namwala GMA around Itezhi Tezhi.
- Good research data available but lack of monitoring and some non-compliance of zoning/regulations/concessions.

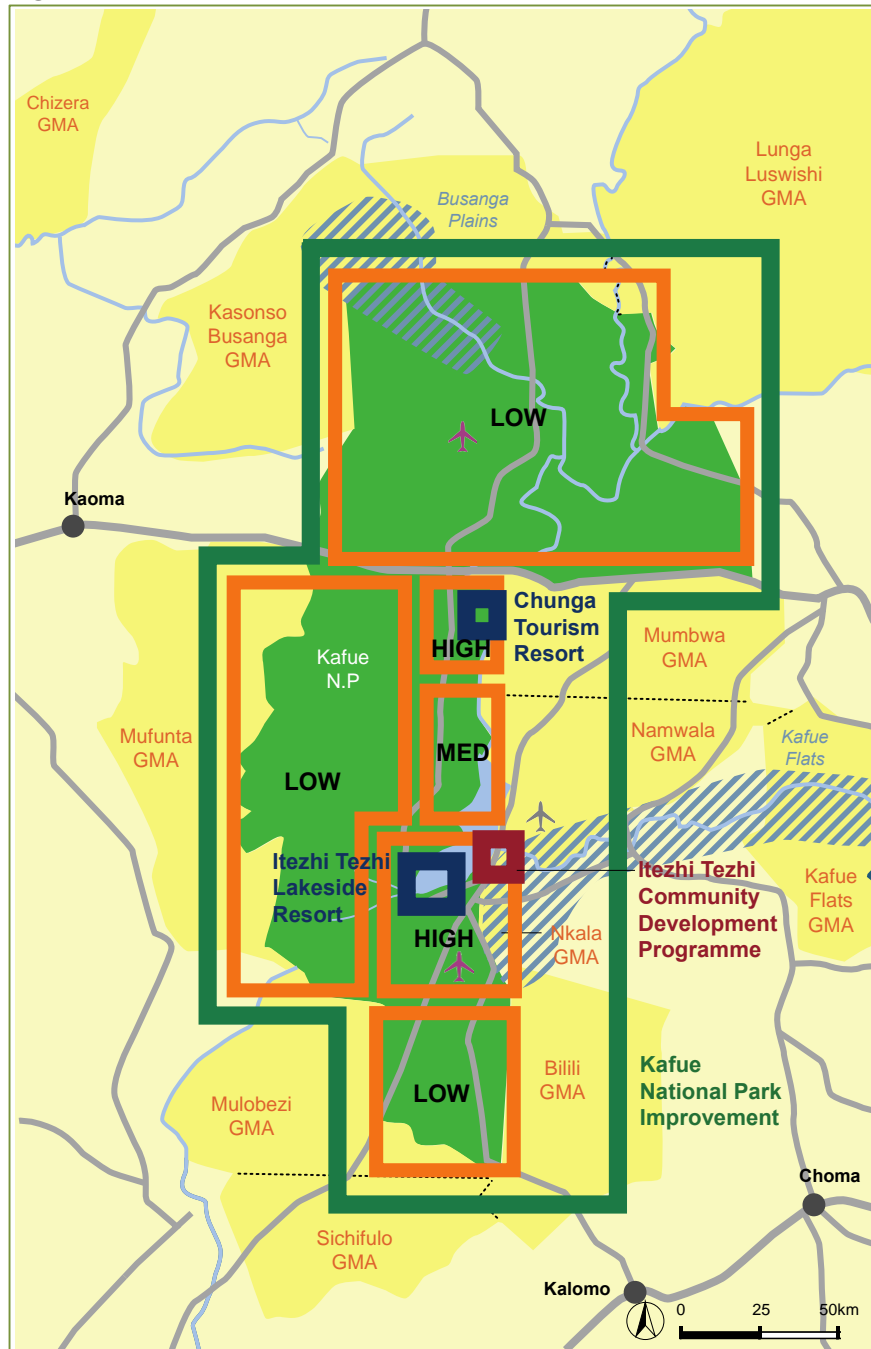
### ***3. Tourism Action Areas***

The park provides a quality wildlife/wilderness experience, but is currently underutilised with low density of wildlife. The park therefore needs to be zoned and themed for a variety of low to high-density development.

Four TAAs are proposed:

1. Kafue National Park Improvement Programme
2. Itezhi Tezhi Lakeside Resort
3. Chunga Tourism Resort
4. Itezhi Tezhi Community Development Programme

Figure 6.26: Kafue TDA



### 1. Kafue National Park Improvement Programme

Many studies have been prepared for the Park. The recent GMP (2011 - 2021) was prepared in 2010 together with a GMP Implementation Project (2012 – 2016) but both are pending approval. The Park was zoned for tourism development (intensive use zones) in an earlier 1999 GMP but have since not been revised. The Nature Conservancy also prepared a 'Tourism Development Approach' (2015), positioning the Park as 'Africa's tourism heart beat and tourism hub' and proposed around 200 rooms. Previous plans have all had similar objectives – to establish the Park as a 'world class' tourist destination of choice, but to date, very little progress has been made to reach this goal.

The aim of this Improvement Programme will be to give emphasis to the tourism component of the GMPs by identifying opportunities for development and achieving a high level of accessibility by air and

road. The park therefore needs to be zoned and themed for a variety of low to high-density development. Two Tourism Centres are proposed. The Park's main focus will be on Kafue Lakeside Tourism Centre/Resort – a planned tourism destination consisting of a number of facilities and accommodation. It is sufficiently removed from, but accessible to both Lusaka and Livingstone to be seen as secluded with the inherent benefits that this brings.

A leisure drive connects the southern entrance gate to the Centre before looping around the southern shores of the lake and on towards the second tourism centre at Chunga. In the future, the leisure drive will extend into north Kafue. From this drive, a series of routes and tourism development sites are possible.

Initially, development in Kafue will be concentrated south of the Itezhi-Tezhi Lake to maximise the potential visitor draw from Lusaka and Livingstone. However, although the Park provides a quality wildlife/wilderness experience, it currently has a low density of wildlife. A restocking programme is proposed for the 'High Density' zone with the possibility of temporary fencing for securing the animals.

## ***2. Itezhi Tezhi Lakeside Resort***

A major integrated resort is planned on the lakeshore to accommodate around 3,000 plus rooms. This proposed concentration of development at the lake will provide the opportunity to:

- Make more efficient use of infrastructure provision.
- Develop in proximity to existing lodges.
- Provide a variety of facilities in one area to meet a wide diversity of tourist needs (water sports, fishing, tennis, horse riding).
- Improve the quality of life for the local community of Itezhi-Tezhi.
- Achieve integrated planning and protection of the environment.

Development will be wrapped around the two promontories of the lake and possibly include the following breakdown of rooms:

- 6 - 8 sites for 300 room hotel properties.
- 20 sites for 50 room properties.
- Integrated supporting sports and recreational facilities.

The accommodation will range from large-scale resorts to smaller, more intimate hideaways.

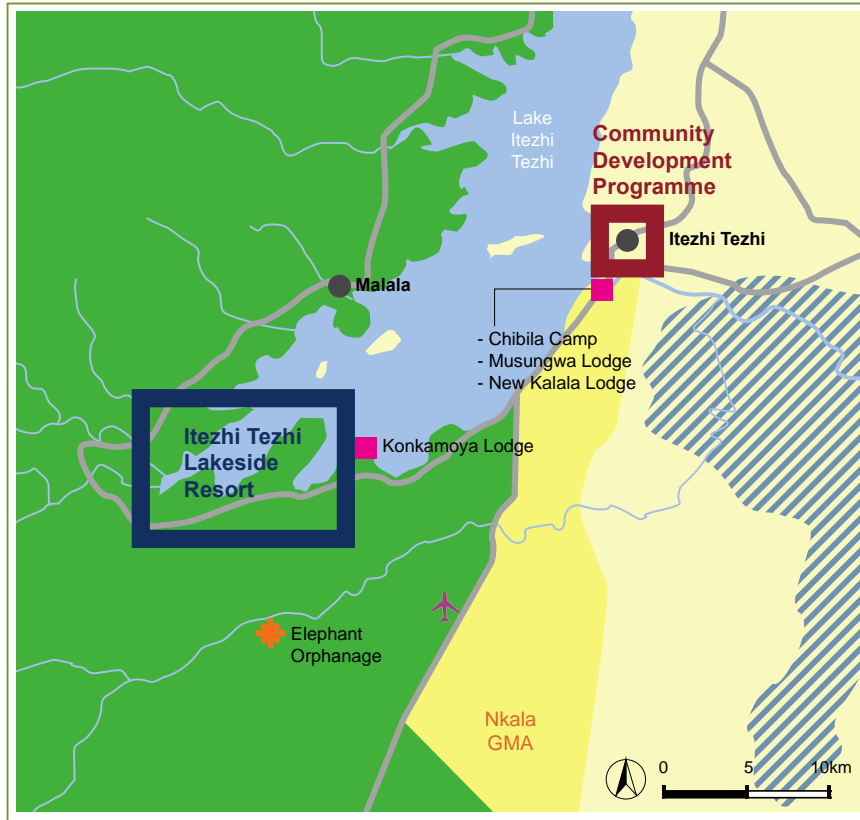
The improved Kalomo-Itezhi Tezhi road and associated Kafue Flats Ecotourism Circuit (section 6.3) will improve access and promote the southern part of the Park.

A master plan and EIA is required for the lakeside integrated resort with a possible first phase development of a 300 rooms getting underway in the first 5 years of the programme. The importance of conducting EIAs cannot be over emphasised. For example, the Itezhi-Tezhi Dam is the major catchment area for the Kafue River systems, which is essential for generation of electricity at Kafue Gorge and supply of water to Lusaka.

*See Guidelines:*

*Site Development Planning*

Figure 6.27: Itezhi-Tezhi Lakeside Resort



### 3. Chunga Tourism Resort

A second integrated resort is planned close to the Chunga gateway to the Park with the same aims of consolidating infrastructure and development. The following breakdown of rooms in a range of accommodation from mid-size resorts to smaller, more intimate lodges and camps are proposed:

- 2 sites for 300 room hotel properties
- 20 sites for 50 room properties
- 20 sites for 10 room properties

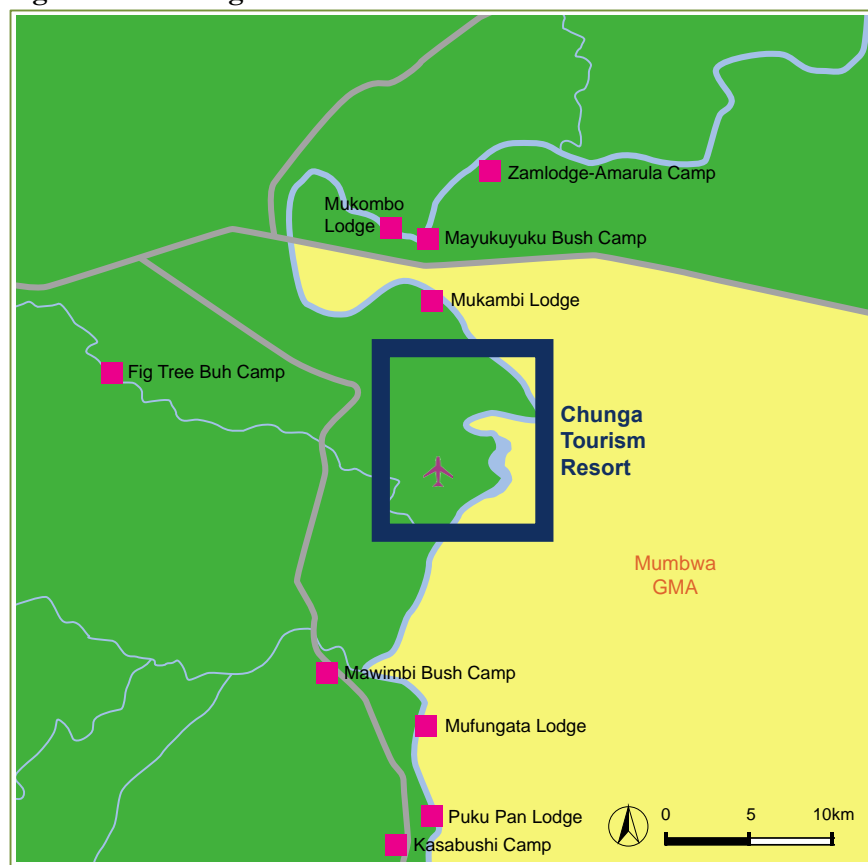
Site development briefs will be required to:

- Specify development land parcels for different uses.
- Assess market demands.
- Define development potential, densities and constraints.
- Incorporate design guidelines and illustrations.
- Develop implementation strategies in conjunction with tourism investment inputs.

This development will be built up in stages under an overall master plan. The Lakeside Resort and Chunga Resort will require more detailed attention in the master plans. A further 500 rooms are envisaged spread throughout the Park in smaller lodge and campsite developments.

*See Guidelines:  
Site Development Planning*

**Figure 6.28: Chunga Tourism Resort**



#### ***4. Itezhi Tezhi Community Development Programme***

It will be important to encourage widespread community participation in the development process. While in general, the community of Itezhi-Tezhi town and other local communities within the adjoining GMAs want the benefits of tourism, it is acknowledged that some residents may lack a realistic understanding of what is involved and what the potential impacts may be. The master plans for both integrated resorts will encourage community participation so communities have realistic expectations for employment and business opportunities.

*See Guidelines: Community Action Planning*

**Table 6.11: Kafue TDA 5 year action plan**

TAA	Activity	Responsibility		US\$ 000's
		Lead	Support	
Kafue NP Improvement	Planning, design and project dossier/input to GMP. Say 3 m/m 1 <sup>st</sup> phase site works	MoTA	DNPW	55
Itezhi Tezhi Lakeside Resort	Concept/pre-feasibility study, development brief and investment Say 4 m/m	MoTA	ZDA DNPW	80
Chunga Tourism Resort	Concept/pre-feasibility study, development brief and investment package Say 3 m/m	MoTA	ZDA DNPW	55
Itezhi Tezhi Community Development Programme	Workshops and assistance. Say 6 m/m	MoTA	CRB's	95

## 6.2.4 Luangwa Valley TDA

### 1. Existing Situation

The Luangwa Valley TDA is not only one of Zambia's greatest wildlife areas but also one of the best in Africa, mostly lying between the eastern escarpment of the Luangwa Valley and the Luangwa River it comprises the National Parks of South Luangwa, North Luangwa, Luambe, Lukususi and Nyika. Smaller outlying locations such as Kundalila Falls and the Mutinondo Reserve are located on the edge of the escarpment to the west. South Luangwa in particular has become widely recognised as the park where the walking safari was pioneered by Norman Carr in the 1950's and which continues to be highly valued by many visitors today.

The Luangwa valley is renowned for its large concentration of wildlife and boasts of having all the major vegetation types found in valleys right across Central Africa. The close proximity of the Parks and their surrounding GMA's, forms an uninterrupted collection of eco-systems.

South Luangwa is the most developed of the parks and has the widest habitat variety with high density of wildlife/game viewing. North Luangwa is largely undeveloped and provides a renowned wilderness experience based for the most part around walking safaris. Wildlife density has been improving under the long-term engagement of the Frankfurt Zoological Society (FZS) and their recently established Rhino Sanctuary. The Luambe, Lukususi and Nyika parks are much smaller with the latter two being particularly remote, with good biodiversity but having low numbers of wildlife and being little visited while Luambe offers only one lodge for prospective visitors and is ringed by highly productive GMA's.

The GMA's surrounding the Luangwa Valley are among the country's most sought after for trophy hunting although uncontrolled hunting is believed to be responsible for the low numbers of wildlife in Lukususi. Road and air access to these remoter parks is only possible in the dry season in contrast to South Luangwa where Green Season tourism has been developing in recent years using water-borne travel to attract the birding, fishing and wildlife viewing markets in the rainy season.

South Luangwa is the most developed of the parks and benefits from its main entrance gate at Mfuwe Bridge being close to Mfuwe International Airport, with its scheduled air services, good main road access via the Lusaka to Chipata Great East Road and proximity to the main park headquarters at Mfuwe. Air access around South Luangwa is supported by numerous small airstrips while air access to North Luangwa is via the private airstrip at the FZS operational base. Road access to North Luangwa from Mpika to the north east is very poor. While there is limited road access to North Luangwa and game loops within the park, there are many more game loops within South Luangwa with few having all weather capabilities. Plans to build a new road between South and North Luangwa will improve access and open up this area while upgraded roads north and south of Lukususi National Park will open up access to this park and surrounding GMA's. Mfuwe airport is also set to be upgraded following the recent tender award for this work to the China National Engineering Corporation.

South Luangwa has a full range of accommodation quality and pricing from budget to high end with a concentration of mid to high-end lodges to be found around Mfuwe. The park mostly attracts international tourists but the domestic market including resident ex-pats are also visitors. The scheduled air services to Mfuwe are an important means of rapid year-round access but the self-drive market is also bringing visitors with lower budgets, which enable the park to demonstrate its wider market appeal.

### 2. Development Potential

#### *Overall Goal*

Develop as a flagship destination area promoting the valley as a diverse wildlife area on par with the best and most well-known national parks in Africa and offering a range of accommodation and activities

#### *Market Mix*

- Primary Markets



- International exclusive safaris
- International packaged explorers
- International eco-tourists
- Supporting Markets
  - International intrepid explorers
  - Domestic short break market
  - International and domestic self-drive market

***Indicative number and style of new rooms required to meet demand by 2038***

- 1,000 rooms @ 4-5 Star standard in 30 lodges of 10-100 rooms set in memorable locations with fine views in the low to medium density zone in South Luangwa.
- 2,500 rooms @ 3-4 Star standard in 10 large lodges/resorts located in the two high density zones within South Luangwa.
- 50 tents for 5 bush camps in the low density zone in North Luangwa.
- 150 rooms @ 4-5 Star standard in 15 lodges of 10 rooms set in secluded natural locations with fine views in the medium density zone in North Luangwa.
- 300 rooms @ 2-3 Star Standard in 5 hotels of 60 rooms each located near Mfuwe International Airport.

***Key Assumptions***

- The planned construction of the new Mpika to Mfuwe road goes ahead enabling a new entrance gate to be created in the north of South Luangwa National Park.

***3. Key Issues***

Key issues include:

- Conflicts between hunting and photographic safaris – too close to each other with hunting taking place in lodge development zone.
- Some congestion at South Luangwa gate – only one entrance to the park – consider further entrances.
- Sprawling urbanisation at Mfuwe – leads to human-animal conflict.
- Some over development of hunting in GMAs - need to ensure more benefits from non-consumptive tourism. Encourage further involvement of communities in conservation – North Luangwa are working in partnership with local communities.
- Some encroachment by communities into GMAs - need to encourage further involvement of communities in conservation.
- Good research data available but lack of monitoring and some non-compliance of zoning/regulations/concessions.
- Poor access from Lusaka via Chipata.

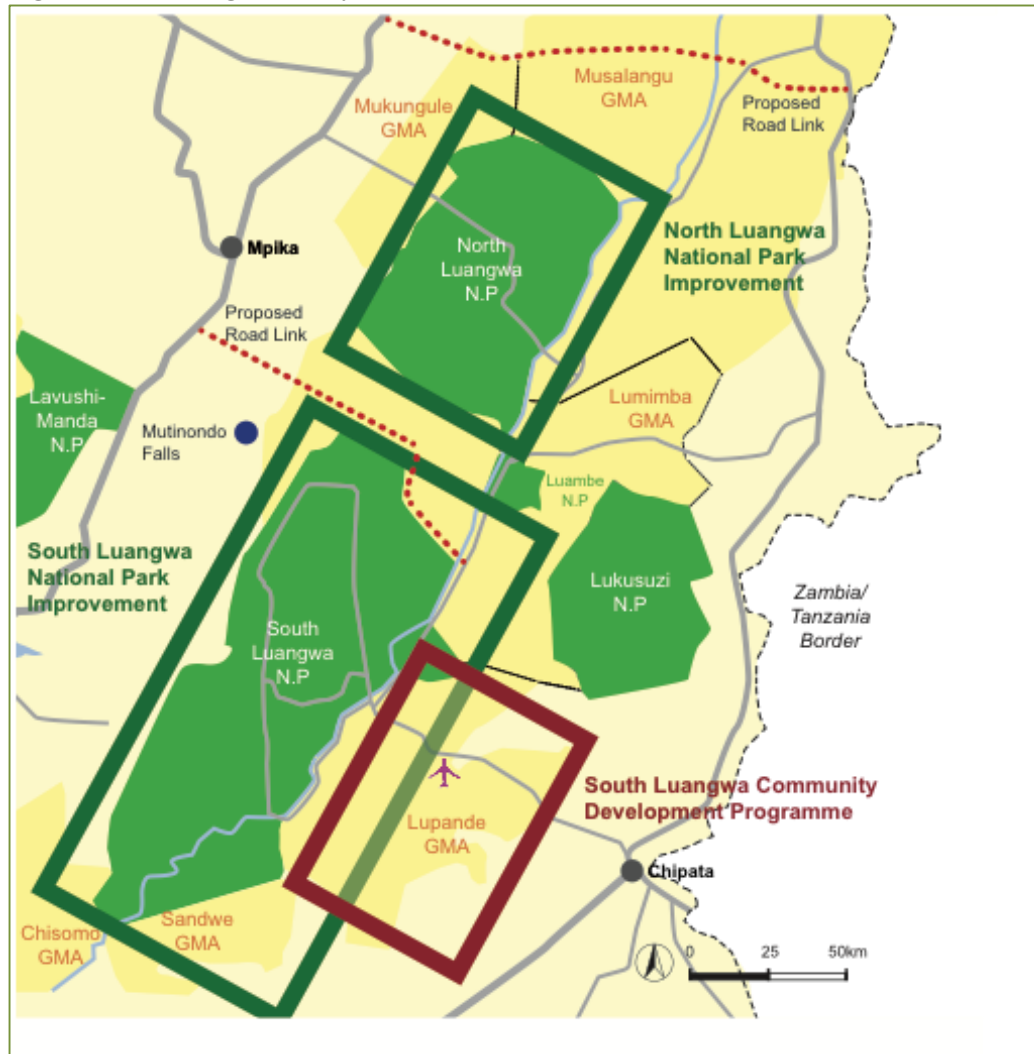
***4. Tourism Action Areas***

South Luangwa is renowned for its large concentration of wildlife viewing. Opportunities exist to increase development if carefully planned. Both parks therefore need to be zoned and themed for a variety of low to high density development. The planned upgrades to Mfuwe airport and the planned Mpika-Mfuwe road will improve access to the TDA.

Three TAAs are proposed:

1. South Luangwa National Park Improvement Programme
2. North Luangwa National Park Improvement Programme
3. South Luangwa Community Development Programme

Figure 6.29: Luangwa Valley TDA



### 1. South Luangwa National Park Improvement Programme

The South Luangwa GMP (2013 – 2023) is still pending approval. The plan is comprehensive and identifies four management zones: wilderness, conservation low use, conservation intermediate use and intensive use with recommended tourism products ranging from accommodation to sport fishing. Six tourism sites have been identified in the ‘Zambia Guide to Investment Opportunities’ for small scale (8 – 16 bed) campsites and lodges. A detailed action plan is set out which identifies management problems and management objectives including visitor use and experience.

Most parts of the Park remain unutilised due to lack of accessibility. The aims of this improvement programme will therefore be to consolidate and build upon the already successful tourism product and identify opportunities for development, achieving a high level of accessibility by road. Thus the Park is zoned and themed for a variety of low to high density development. It will be important however, to plan for this expansion carefully in order to retain the wilderness experience and promote the theme of walking safaris, a speciality of the area.

Three high density consolidated zones for development are identified together with a series of lower to medium density zones. The Consolidated development zones are proposed at:

- Mfuwe, around the main entrance gate to the Park. No further development should occur here.

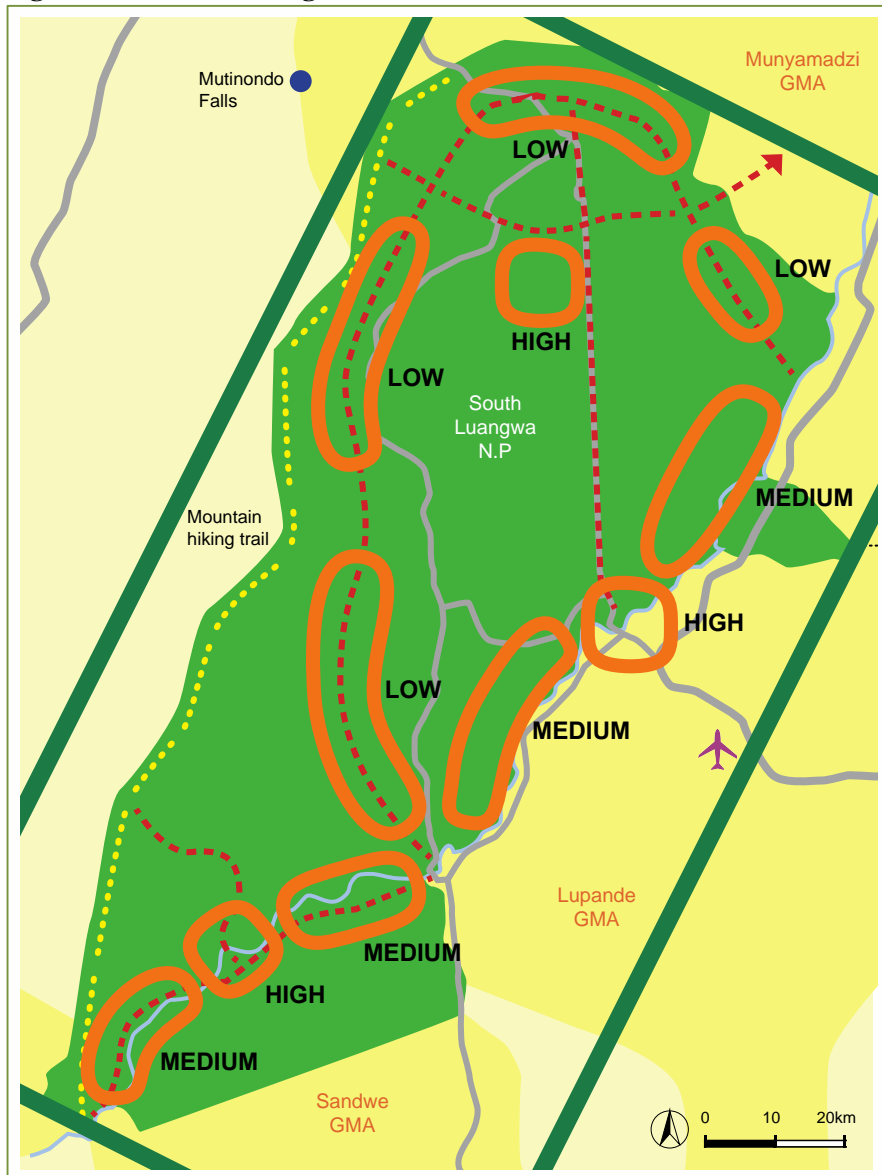
- Northern sector as a focus for the north of the Park with access from a new gate from the proposed link road.
- Southern sector as a focus for the south of the Park with access from a new gate at Lusangazi.

The north and south high density zones will accommodate large lodges/resorts perhaps over 100 rooms each. The lower to medium zones would include a spread of smaller 10 to 100 room properties. New all-weather roads will connect the different development zones.

A South Luangwa hiking trail along the western boundary of the Park is proposed to incorporate the natural values of the ridge. Hiking and nature/wildlife walks are becoming an important part of the visitor's experience of Zambia, and providing this unique hiking experience will increase the overall attraction and value of the tourism product offered. The trail may also be extended into North Luangwa and possibly south into Lower Zambezi creating a major hiking product. The trail will be developed incrementally based on market interest and demand and be integrated with the nature and heritage attractions.

*See Guidelines: Site Development Planning*

**Figure 6.30: South Luangwa TAA**



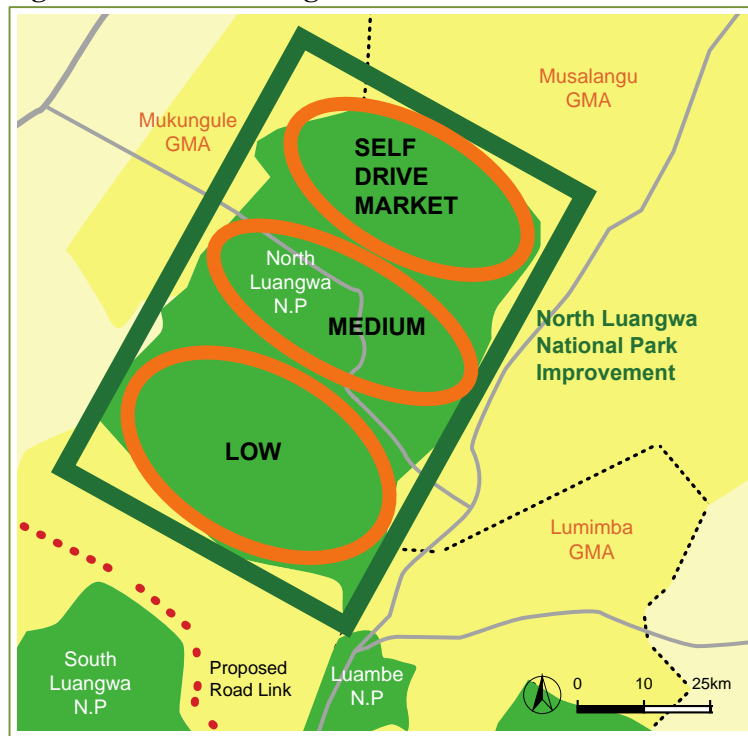
## 2. North Luangwa National Park Improvement Programme

The North Luangwa GMP was approved in 2004 but is currently under review. The Park has benefitted from a 30 year partnership between FZS and the DNPW providing assistance in the planning, management, monitoring and evaluation of the Park. A recent (2017) Concept business plan for a proposed Public Private Partnership for the Park has been prepared with the intent to enhance management efficiency and effectiveness, protect and grow the Park's wildlife populations, in particular the black rhino, and firmly establish the Park as a premier park within Zambia and as a model regionally.

Three tourism development zones are identified:

- Medium density zone - consolidate existing lodges and identify sites for small-scale development.
- Low density zone primarily geared towards the tented camp market.
- Self-drive zone, capitalising on a potential and access from the proposed east-west link road to the north of the Park and self-drive circuit from Tanzania.

Figure 6.11: North Luangwa TAA



Both Luambe and Lukusuzi National Parks are largely depleted of wildlife. Consideration should be given to leasing out these parks to private investors on a restock-operate –transfer basis.

*See Guidelines: Site Development Planning*

## 3. South Luangwa Community Development Programme

It will be important to encourage widespread community participation in the development process, particularly within the Lupande GMA. Here, there are conflicts between hunting and tourism and also between the local communities and wildlife. The area has developed with no planning and consequently has spread out with communities sprawling over historical wildlife corridors. In the future, the communities will benefit from modern amenities but at present, the development sprawl does not facilitate improvements and rural regeneration.

Existing and new development must be concentrated within rural and urban villages and be capable of being well-served by infrastructure. Efficient development must be a cornerstone of Zambia's future

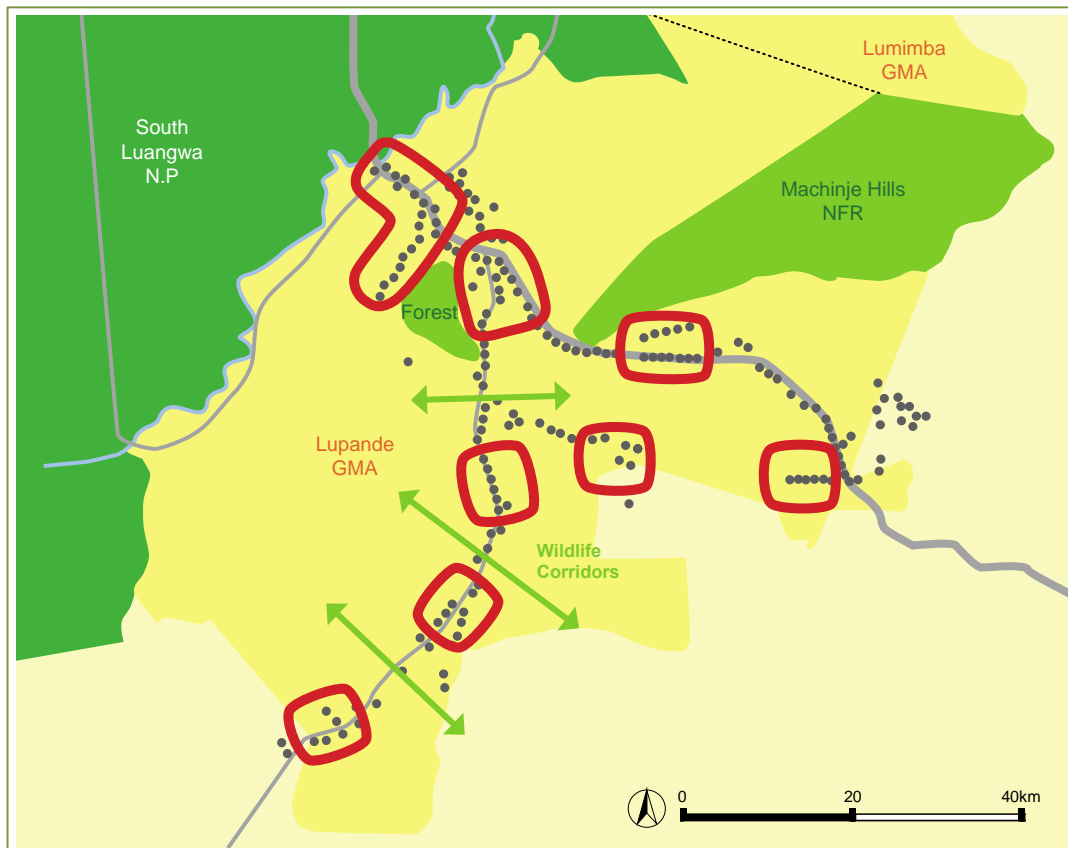
urban policy. Lupande GMA will be a case study in how to move towards a more sustainable future by firstly consolidating villages, identifying a hierarchy of transport routes, creating wildlife corridors, zoning hunting/photographic areas, and improving the public realm in ways that are participatory and inclusive.

Over the next 20 years and beyond, sustainable patterns of development that successfully integrate land use and transport links, consolidate and intensify housing, retail, commercial and work places, provide access to public transport and offer the option to walk or cycle to work, homes and recreation and leisure facilities and services will thus become more important.

From a tourism perspective, one of the initial challenges will be to increase awareness of the tourism potential of the Luangwa Valley through existing CRBs and assist them, where necessary, to establish working organizations with whom to interact on community tourism planning. In addition, the process must also accommodate the interests of individuals in local communities who may wish to pursue particular tourism projects or businesses.

*See Guidelines: Site Development Planning, Community Action Planning*

**Figure 2.31: Village consolidation concept**



**Table 6.12: Luangwa Valley TDA 5 year action plan**

TAA	Activity	Responsibility		US\$ 000's
		Lead	Support	
South Luangwa NP Improvement	Planning, design and project dossier/input to GMP. Say 2 m/m 1 <sup>st</sup> phase site works	MoTA	DNPW S.L. Cons Society	40
North Luangwa NP Improvement	Planning, design and project dossier/input to GMP. Say 1 m/m 1 <sup>st</sup> phase site works	MoTA	DNPW FZS	30
South Luangwa Community Development Programme	Planning, design, workshops and assistance. Say 4 m/m	MoTA	DNPW CRB's	85

## 6.2.5 Lower Zambia TDA

### 1. Existing Situation

The TDA includes Lower Zambezi National Park and adjoining Chiawa GMA.

The National Park, classified in 1983, has a formidable reputation for big game but it was not always so, suffering from very high levels of poaching in the 1980's. However, the Park is still recovering from 20 years of neglect with the Park authorities, assisted by Conservation Lower Zambezi and the private sector, all contributing to the improvement, enabling the Park to provide a high quality, uncrowded, wildlife experience.

The Park shares the Zambezi River as a common border with Mana Pools National Park in Zimbabwe, which allows the migration of animals to take place across the river between the two Parks.

At present there are a small number of mostly up-market lodges within the Park itself while a higher density of mid to high-end lodge development has taken place to the west in the Chiawa GMA, which offers a similar, if more crowded wildlife experience where community encroachment is perceived to be becoming more evident. Development in both the Park and the GMA is concentrated along equally scenic riverbank stretches of the Zambezi where water based activities including canoeing, boating, angling and sport fishing take place alongside the more traditional land-based game drives, birding and walking safaris. Some hunting also takes place in the GMA. Wildlife includes lion, wild dog, leopard and a large elephant population.

Access is by scheduled air or charter services to all weather airstrips at Royal, which is paved and just outside the Park, or to Jeki airstrip, inside the Park, by charter to Kulefu airstrip within the Park or by road as far as Chiawa via the good Lusaka to Chirundu road, and then by either 4WD or boat. An alternative road from Lusaka via Chongwe is in poor condition although there are plans to upgrade this route. Proposals to build a new road parallel to the Zambezi river front, from Chirundu through the Park to Luangwa are questionable and hotly contested. Road access to surrounding GMA's is limited while the game loops within the Park and the GMA require regular maintenance and this is usually undertaken by the lodge operators. Lodge operational supplies and guests are also transported by boat from Chirundu.

The visitor markets for the Park and the Chiawa GMA are mainly international with some domestic arrivals.

### 2. Development Potential

#### *Overall Goal*

Develop as a flagship destination area promoting the park as 'the jewel of the Zambezi' with an emphasis on quality lodge accommodation.

### **Market Mix**

- Primary markets
  - International exclusive safaris
  - International packaged explorers
- Supporting markets
  - International eco-tourists
  - Domestic short-break market

### *Indicative number and style of new rooms required to meet demand to 2038*

- 200 rooms @ 4 to 5 Star standard in 20 lodges and boutique style operations of 10 rooms set in secluded and memorable locations with fine riverside or natural landscape views, mostly located in Chiawa GMA.

### *Key Assumptions*

- The proposed new access road connecting Chiawa GMA with Chavunga – Luangwa Road is built.

### **3. Key Issues**

Key issues include:

- No agreed GMP and effective planning controls, policy or guidelines agreed by stakeholders within the NP and GMAs.
- Some congestion within Chiawa GMA – opportunities for further development is limited if the positioning of 'low volume – high value' is to be retained.
- Over development of fishing in NP and GMAs - need to encourage further involvement of communities in conservation.
- Human-wildlife conflict in GMAs - need to ensure better community benefits.
- Major threats of human encroachment, mining in park, potential dam development further down the valley, etc.
- Good research data available but lack of monitoring and some non-compliance of zoning/regulations/concessions.

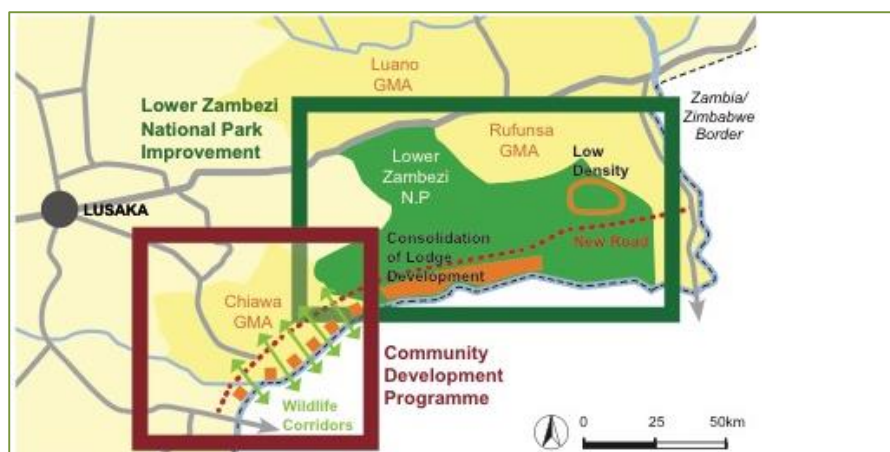
### **4. Tourism Action Areas**

Opportunities for further development are limited within the park. Consolidation of sites within the GMA is required.

Two TAAs are proposed:

1. Lower Zambezi National Park Improvement Programme
2. Chiawa Game Management Area Community Development

### **Figure 6.32: Lower Zambezi TDA**



### ***1. Lower Zambezi National Park Improvement Programme***

Lower Zambezi GMP was prepared in 2001 but now needs review and agreement between stakeholders on the future planning and management of the Park. A draft revision of the GMP identifies many issues and management concerns including uncontrolled tourism development (lack of design/development guidelines), poaching of wildlife, human encroachment and lack of infrastructure. Proposals are put forward to address these issues including the establishment of a management zoning scheme.

Opportunities for further development are limited within the Park. However, a new access road running east-west at the base of the escarpment away from the river front, connecting Chiawa GMA and the Chavunga – Luangwa Road is proposed. This will help distribute game drives and relieve traffic along the river frontage ensuring the sustainable use and conservation of the Park. The new road will also open up opportunities for bush camps/walking safaris in the north east of the Park.

*See Guidelines:*

*Site Development Planning*

### ***2. Chiawa Game Management Area Community Development Programme***

Chiawa GMP was prepared in 2014 but now needs review and agreement between stakeholders on the future planning and management of the Park. There is concern over the lack of planning and land use conflicts in the GMA, especially the increase in development just west of the Park where the possible establishment of a new airfield may be required.

Consolidation of the development of communities is also needed and a programme of rural/urban renewal as proposed for the Lupande GMA be implemented to cluster villages and re-establish wildlife corridors enabling access to the river. A programme to re license tourism operators along the river front is also required as many of the properties are now being used for private residencies, reducing the tourism development opportunities for both new investors and community projects.

The aim of Programme will also be to provide the local communities with the opportunity to make known their feelings and fears, hopes and aspirations, suggestions and preferences to Government. There will be opportunities to develop a range of projects including accommodation, camping sites and interpretation of local customs, farming and agriculture. The challenge will be to encourage tourists visiting the Lower Zambezi Park to visit the GMA and spend time investigating some of the villages of the area.

*See Guidelines:*

*Site Development Planning*

*Community Action Planning*

**Table 6. 13: Lower Zambezi TDA 5 year action plan**



TAA	Activity	Responsibility		US\$ 000's
		Lead	Support	
Lower Zambezi NP Improvement	Planning, design and project dossier/input to GMP. Say 1 m/m 1 <sup>st</sup> phase site works	MoTA	DNPW Cons. Lower Zambezi	30
Chiawa GMA Community Development Programme	Planning, design, workshops and assistance. Say 4 m/m	MoTA	DNPW CRB's	85

## 6.2.6 Samfya TDA

### 1. Existing Situation

This TDA covers the town and surrounds of Samfya, which is located on the southern tip of Lake Bangweulu to the west of the important Bangweulu Wetlands Ramsar site. The town is accessed easily by the spur road, which leaves the Great North Road beyond Serenje in the direction of Mansa, some 80 km to the north. Access by air is from Mansa airport.

Samfya is a small town but it is familiar to most Zambians for its waterfront setting on fine white sandy beaches and extensive views over Lake Bangweulu. The town is well known for its connection to the Bangweulu wetlands and as a location for birdwatching and it has a small harbour for local fishing boats and for small vessels ferrying residents of the several islands just offshore.

The town has a small number of hotels including one recently opened on the newly paved corniche overlooking the beach. The hotel belongs to a small Zambian hotel group and it has recently been successfully attracting business from the small meetings/NGO market.

The town is located on an attractive peninsula that extends into the lake and has become home to a small fishing community. The peninsula has the potential for leisure development and is big enough for the fisher community to remain on-site.

### 2. Development Potential

#### *Overall Goal*

Develop Samfya as a domestic holiday and MICE destination.

#### *Market Mix*

- Primary Markets
  - Domestic meetings and conference market
- Supporting Markets
  - Domestic short break market

#### *Indicative number and style of new rooms required to meet demand by 2038*

- 500 rooms @ 3 Star standard in 5 hotel/resort style properties with 100 rooms each located on or beside the beachfront.
- 250 rooms @ 3 Star standard in 5 smaller resort style hotels with 50 rooms each located with views of the lakeside or natural landscape.
- 250 rooms @ 3 Star standard in 25 guest house style properties with 10 rooms each in a mix of urban and lakeside positions.

#### *Key Assumptions*

- That upgrading of the beach and surrounding environment takes place to improve the image of

the town and the corniche.

- That the proposal for The Peninsula receive ‘buy in’ from the local community and that works commence first on other aspects of the development.

### 3. Key Issues

There are currently very ambitious plans for the area including beach resorts, golf course, theme park, shopping mall, sports complex, harbour and large airport, but there are no market or feasibility studies to justify such large scale projects. Samfya is located a long distance from existing and potential tourism markets but has potential, especially promoting domestic conferencing and weekend retreats. A longer-term phased approach is recommended.

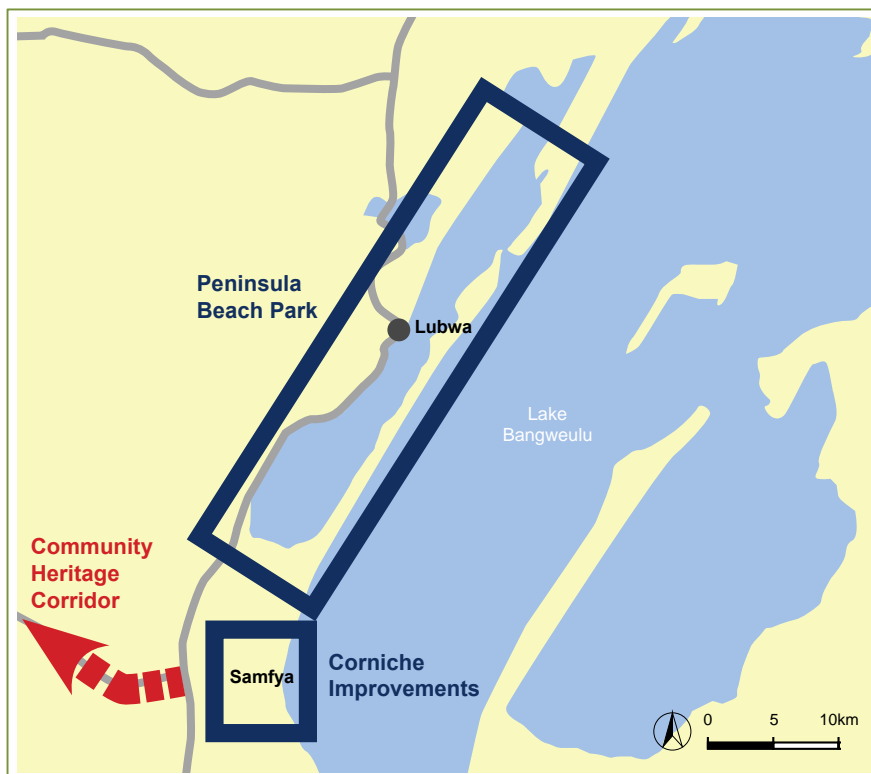
### 4. Tourism Action Areas

Samfya is recognised for its beaches and birding but with limited wildlife. The town also promotes the government/NGO conference market.

Two TAAs are proposed to kick start the regeneration process:

1. Samfya Corniche
2. Samfya Peninsula Beach Park

Figure 6.33: Samfya TDA



#### 1. Samfya Corniche

In the longer term, it is recommended that an urban design strategy is prepared for Samfya to ensure the best is made of the town and identify key tourism sites and opportunities. Initially the TAA will focus on the waterfront to enhance current works to the corniche and beach to:

- Upgrade and improve the image of the beach and surrounding environment.
- Increase recreational opportunities and business opportunities for the local community.
- Increase public awareness of the coastal environment.
- Create land value and interest in developing the hinterland for hotel resort development (say 5 sites for 100 room properties).

The beach is an important asset for Samfya providing opportunities for day and weekend use. Further facilities can be provided including shelters, toilets, showers and changing facilities, beach chairs, interpretative boardwalks and trails, picnic areas, children's play areas, event spaces and improved boat access through pontoons and moorings allowing for boat cruises on the lake. There are possibilities for a small marine interpretation centre without door aquarium/marine tanks.

Effective ongoing management and maintenance will be key.

*See Guidelines:*

*Urban Design Process*

## **2. Samfya Peninsula Beach Park**

Currently the peninsula is home to a fishermen community. However, the site can accommodate the village in a planned community as well as a large number of visitors, which is important in its revenue generation potential, with ample scope and need to provide good and well maintained beach facilities. The Peninsula is also large enough to identify reserve sites for some of the more future ambitious projects.

General landscaping and a range of activities and facilities will transform the peninsula.

Four specific projects are proposed:

***Samfya Bird Watching Centre/Ecolodge:*** Providing interpretation and awareness of the bird life and habitat for both the general visitor and more discerning bird watcher as well as quality accommodation in a unique setting.

***Samfya Activity Centre:*** A recreational amenity to provide educational and activity programmes focusing on youth. The educational programme will include nature and marine based study, sustainable fishing and agricultural practices, and wildlife habitat. The activity programme will include outdoor sports (football, tennis), and adventure course.

***Samfya Camp Site:*** A community led camp site (both permanent and temporary tents structures) and retail outlet (arts and crafts) with a programme to provide support and encouragement to local people to become involved in the activities of the camp site.

***Samfya Parkway:*** An interpretive and scenic route providing access to the beach, community facilities and picnic areas along its route. It will be identified by special signage with entry gates with supporting landscape to establish an open and welcoming gateway.

The Parkway will provide access to the Bird Watching Centre, Activity Centre and Camp Site and will be the start/finish of the proposed Community Heritage Corridor.

A master plan and site development briefs will need to be prepared but the active participation of the park, the private sector and community in the planning, development and management of the peninsula will be essential for its long term sustainability

*See Guidelines:*

*Site Development Planning*

*Community Action Planning*

The proposed Community Heritage Corridor (section 6.3) will improve access and promote the TDA.

**Table 6.14: Samfya TDA 5-year action plan**

TAA	Activity	Responsibility		US\$ 000's
		Lead	Support	
Samfya Corniche	Planning, design and project dossier/input to Samfya IDP Say 2 m/m Architecture and 1 <sup>st</sup> phase site works	MoTA	Samfya Municipality	40
Samfya Peninsula Beach Park	Concept/pre-feasibility study, development brief and investment package Say 3 m/m	MoTA	Samfya Municipality	55

## 6.2.7 Siavonga TDA

### 1. Existing Situation

The Siavonga TDA is based in and around the town of Siavonga, which was newly created on the side of Lake Kariba once the dam was built and opened in the early 1960's.

Siavonga is the most developed town on the Zambian side of the Lake and most attractions on Lake Kariba are located around the town and to a lesser extent further down the Lake at Sinazongwe. Siavonga is not far from the dam itself and visitors can collect a free pass from security to walk along the road on the top of the structure.

There are numerous fishing, boating and water sports options available as well as trips on lake cruisers and house boats. The lakeside setting and views across the lake offers a major contrast to urban Lusaka and five hotels with 240 rooms plus a number of guest lodges, B&B's and house boats are available for business and leisure markets.

Lake Kariba is being overfished and that is why several boat operators take their guests a long way out onto the Lake to find a good location for their sport. Plans for the town's first shopping mall have been published.

Siavonga has good road access from Lusaka and from Chirundu, the main crossing point with Zimbabwe, but the roads within the town are generally in a poor condition. The town attracts mostly domestic meetings and conference demand, mainly from the greater Lusaka area but only limited domestic tourists at the weekend.

### 2. Development Potential

#### *Overall Goal*

Develop as a domestic destination area providing a range of accommodation and strengthening the tourism offer in a waterfront setting.

#### *Market Mix*

- Primary Markets
  - Domestic MICE markets
- Supporting Markets
  - Domestic short-break market

#### *Indicative number and style of new rooms required to meet demand by 2038*

- 750 rooms @ 3-4 Star standard in 3 resort style conference hotels with 250 rooms each

- overlooking the Lake.
- 450 rooms @ 3-4 Star standard in 3 resort style conference hotels with 150 rooms each overlooking the Lake.
- 500 rooms @ 3 Star standard in 10 hotels of 50 rooms each built in a more boutique style with lake or open natural views.
- 300 rooms @ 3 Star standard in 15 small hotels/guesthouses of 20 rooms each.

#### *Key Assumptions*

- Acceptance and implementation of an urban design strategy that improves the appearance and management of the environment and physical setting of the town.
- Improved entertainment, night life and shopping environment for conference delegates and short break visitors.

### **3. Key Issues**

Key issues include:

- A number of prime waterfront sites remain undeveloped.
- Poor public realm, no footpaths, limited public open spaces and limited access to the lakeshore.
- No interpretation of the Kariba dam project.
- Conflict between kapenta fishing and tourism; lake being over-fished

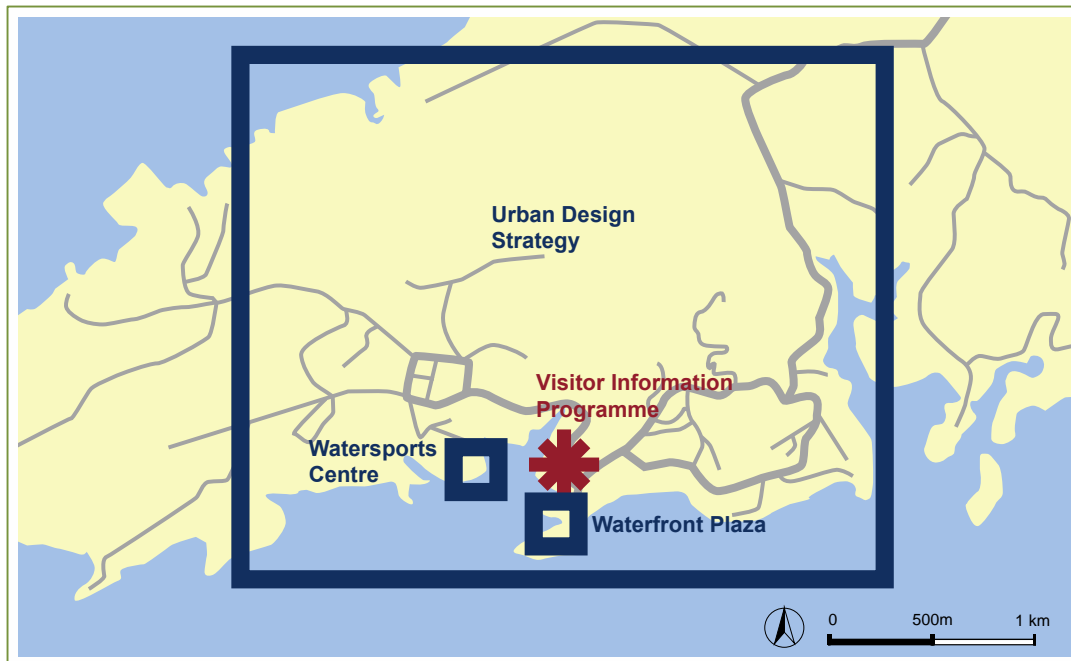
### **4. Tourism Action Areas**

There are undeveloped waterfront sites, limited public access to the lake, poor public realm and no interpretation of the lake or dam.

Four TAAs are proposed to encourage regeneration of the town:

1. Siavonga Urban Design
2. Siavonga Watersports Centre
3. Siavonga Waterfront Plaza
4. Siavonga Visitor Information Programme

**Figure 6.34: Siavonga TDA**



### ***1. Siavonga Urban Design Strategy***

The Siavonga IDP was prepared in 2014 and sets out a spatial development framework for the town. In addition to this high level plan, there is a need for a comprehensive, co-ordinated and concentrated effort to achieve the town's true potential and create a physical setting which is visually interesting, distinctive and a comfortable pedestrian environment, encouraging visitors, both locals and tourists, to stay longer and spend more. It is projected that a further 2,000 rooms are envisaged for the town and surrounds either on redeveloped or new sites which are to be identified.

A programme for upgrading the main roads is currently being drawn up. But the town also needs attractive public spaces and public access to the lake. Both of which are key requirements for the development a tourism friendly town. Public open space plays an essential role in providing the necessary facilities for a wide range of leisure, educational and recreational activities from formal sporting facilities to walking, sitting, informal play and cultural and entertainment facilities.

The most important public spaces are the urban streets. Because of their use and visibility, streets can potentially play a powerful role in building a positive, unified image and act as a catalyst for further urban regeneration. Besides the urban street, other types of public spaces include parks, pocket parks and squares. They are important, especially for Siavonga to preserve view corridors to the lake and facilitate safe pedestrian (and cycle) movement within the town. A series of trails through the forest areas will also connect with the urban streets offering further views and access to the lake.

*See Guidelines:*

*Urban Design Process*

*Community Action Planning*

### ***2. Siavonga Watersports Centre***

A major recreational facility located along the shores of the Lake Kariba is proposed including water access for kitesurfing and a watersports training center focused on dinghy sailing, kite surfing, paddle board training and chandlery shops to act as a focal point for non-motorized watersports. A suitable site will need to be identified.

The Centre will be associated with the future watersport projects further west towards Sinazongwe to develop satellite centers that provide education and awareness among Zambians. This will be part of developing a strong regional watersports brand for Zambia.

*See Guidelines:*

*Site Development Planning*

### **3. Siavonga Waterfront Plaza**

A small urban park is proposed on a site adjacent to the Lake Safari Lodge. The public park will provide access to the lake via a slipway and include a few moorings. The project will allow local community participation in holding events and possible local fish fry which will be very attractive for visitors, both international and domestic, to mix with the local community.

As Siavonga expands its tourism offer, focus needs to be on providing good basic infrastructure to allow residents and visitors to access the water environment easily.

*See Guidelines:*

*Site Development Planning*

*Community Action Planning*

### **4. Siavonga Visitor Information Programme**

It will be important to encourage widespread community participation in the development process. The Visitor Information Programme offers significant opportunity to increase local benefits from development. Examples include the creation of community-based products, community involvement in resource management for nature sites and trail guiding, and business and job opportunities for residents in local communities.

The intent of this Programme is therefore to:

- Significantly increase awareness concerning the town's heritage, nature and water based opportunities.
- Establish a set of trails which are emphasised in marketing lure pieces and an 'official guide' too community based tourism in Siavonga.

Siavonga provides an excellent opportunity to interpret the forestry, marine and coastal habitats. A series of trails will be designed to provide interpretive routes and loop trails around and through the town and linking to the Kariba Dam. The following actions are required:

- Develop a master plan for trail design and location, associated infrastructure, handicap accessibility, safety, maintenance and monitoring.
- Develop a fee capture system and long term business plan for the sustainable operation and maintenance of the trail system.
- Develop interpretative materials and guide training programme to ensure product quality and sustainability, and in the long term educational opportunities.
- Develop a marketing plan and associated materials to assist in promoting these trails to tour operators and visitors.

A tourism visitor centre and trail guiding centre is proposed which will be the focus for the Visitor Information Programme. The Centre will not only promote Siavonga, but also the heritage, nature and community sites within each of the TDAs.

*Guidelines:*

*Site Development Planning*

Table 6.15: Siavonga TDA 5 year action plan

TAA	Activity	Responsibility		US\$ 000's
		Lead	Support	
Siavonga Urban Design Strategy	Planning, design and project dossier/input to Siavonga IDP Say 2 m/m	MoTA	Siavonga Municipality	40
Watersports Centre	Concept/pre-feasibility study, development brief and investment package Say 2 m/m	MoTA	Siavonga Municipality	40
Waterfront Plaza	Planning, design and project dossier Say 2 m/m Architecture and 1 <sup>st</sup> phase site works	MoTA	Siavonga Municipality	40
Visitor Information Centre	Planning, design and project dossier Say 2 m/m Architecture and 1 <sup>st</sup> phase site works	MoTA	Siavonga Municipality	40

## 6.2.8 Nsumbu TDA

### 1. Existing Situation

Nsumbu National Park and Kasaba Bay on Lake Tanganyika are the primary focus for this TDA.

Nsumbu National Park is extremely attractive and unspoilt with limited wildlife numbers while the Kasaba Bay lakeside area was popular in the Colonial period when the national airline operated a scheduled service there. The remoteness and low level of visitor numbers has constrained the development of accommodation; however, there are two small lodges on the Park (Nkamba Bay and Ndole Bay).

Lake Tanganyika is an iconic African natural feature and it provides an excellent tourism resource for sport fishing, angling, diving, kayaking and boating around the attractive lakeshore with its mix of inlets bays and beaches. Visitors are few.

Access to the TDA is limited by air with only a small number of airstrips available although one is located by Nkamba Bay Lodge in the Park. Other airstrips are at Kawambwa and Mporokoso with the latter being planned for upgrading. Scheduled air services are available at Kasama and there are proposals for the military airport at Mbala to open to civilian flights.

Kasaba Bay itself had an airstrip in the Colonial period and this became incorporated in a major new airstrip development which was later abandoned mid-way through construction. This now represents a site requiring urgent attention especially since it is located in a prime development zone.

Good road access is in place via the Great North Road to Kasama, Nakonde, Mbala and the port of Mpulungu to the east of the TDA and from Mansa to Lake Mweru on the west but east-west connectivity and access to the NP's off these main routes is often very poor.

The tourism market for this area is mainly domestic and the ex-pat self-drive visitor enjoying watersports and relaxing at Lake Tanganyika.

### 2. Development Potential

#### Overall Goal

Promote as an integrated resort and watersports destination area.



### ***Market Mix***

- Primary Market
  - International adventure/sports markets
  - International self-drive markets
- Supporting Markets
  - Domestic leisure market
  - Domestic self-drive markets

### ***Indicative number and style of new rooms required to meet demand by 2038***

- 200 rooms @ 3-4 Star standard in a single resort spa hotel with sports facilities, beach club and marina.
- 160 rooms @ 3-4 Star standard in 8 lodges/camps of 20 rooms set in beach locations with lake or open natural views.
- 140 rooms @ 3-4 Star standard in 7 lodges and boutique style operations of 20 rooms set along the riverside with Fine River and natural open landscape views.

### ***Key Assumptions***

- Completion of the Nsumba – Mbala road.
- Completion, publication and availability of the updated Nsumba GMP.
- Availability of a full feasibility study for the large beach/lake front project.

### ***3. Key Issues***

Key issues include:

- Remoteness is the area's main constraint – distance from main markets and key tourism entry points and tourism sites are spread out with long distances in between. There is a need to consolidate development around Kasaba Bay and identify circuits to connect with waterfalls.
- Abandoned airstrip at Kasaba Bay may impact on future beachfront development.
- Market demand for resorts and lodges may however be limited.
- Limited wildlife/game viewing as poaching is a serious problem - need to encourage partnerships (FZS), private investment and further involvement of communities in conservation.
- Possible environmental/tourism impacts from proposed hydro plants at some of the waterfalls.

Remoteness is the area's main constraint for future development. The proposals will be amongst the most difficult to implement, involving new access roads and impacting on the local communities. However, they are collectively very important for the long term sustainability of the area.

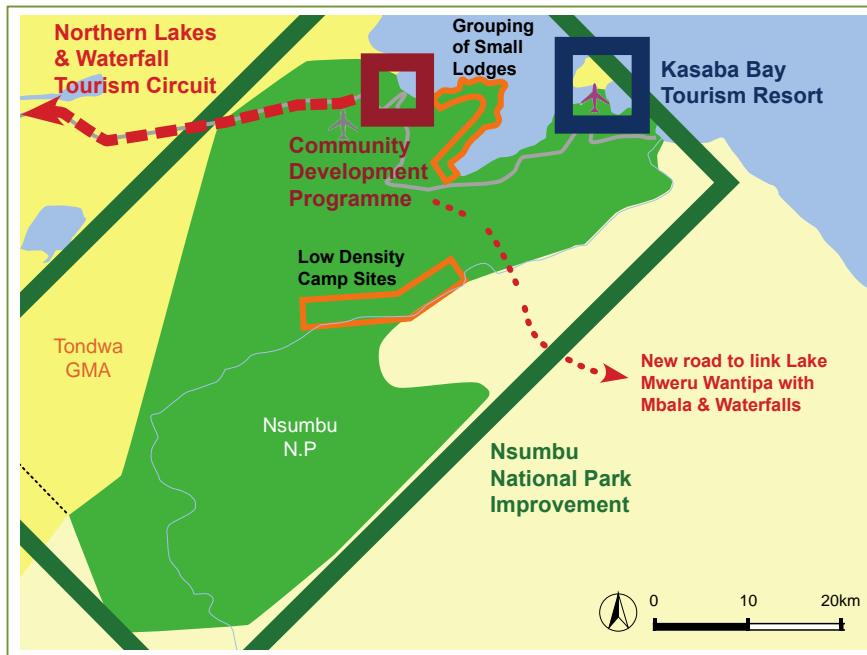
### ***4. Tourism Action Areas***

Lake Tanganyika is an iconic feature of Africa but remoteness is the area's main constraint with limited wildlife. The lakeshore needs to be positioned as a 'get away from it all' destination with emphasis on sports, health and wellness. The planned Sumba- Mbala road and associated Northern Lakes and Waterfall Tourism Circuit (section 6.3) will improve access and promote the TDA.

Three TAAs are proposed:

1. Nsumba National Park Improvement Programme
2. Kasaba Bay Tourism Resort
3. Nsumba Community Development Programme

### **Figure 6.35: Nsumbu TDA**



### ***1. Nsumbu National Park Improvement Programme***

Due to its location to Lake Tanganyika, Nsumbu National Park has potential to accommodate a high number of visitors. The Lake has the capacity to offset pressure created on land by offering water based tourism activities – boating, water skiing and the like. The Park also benefits from many cultural heritage sites including shrines, archaeological findings and waterfalls. However, the Park suffers from depleted wildlife, inadequate infrastructure (game viewing roads and loop roads) and tourism facilities.

An updated Nsumbu GMP is currently being prepared with input from the recent Kasaba Bay IDP (2014). Five tourism development sites are identified each around 10 hectares and spaced out around the shores of the lake. The Kasaba Bay site has been identified for administration and airport facilities. Although the IDP sets the scene for development, no market or prefeasibility study has been undertaken in the plan preparation. A slow and reserved approach to development is therefore recommended.

Firstly, the Kasaba Bay site should be reassessed. This site has the best beach in the region and can accommodate a large resort, and with the reintroduction of an airstrip, the project will help kick start the regeneration and development of the Park.

Secondly, the grouping of smaller tourism lodges is recommended along the lakeshore to:

- Make more efficient use of infrastructure provision.
- Develop in proximity to shared services.
- Provide a variety of facilities in one area to meet a wide diversity of visitor needs.
- Achieve integrated planning and protection of the environment.

A third zone for tourism development is along the Lufubu River where a series of small lodge/camp sites can be located with views over the plains.

*See Guidelines:*

*Site Development Planning*

*Community Action Planning*

### ***2. Kasaba Bay Tourism Resort***

The Kasaba Bay Resort has potential to include a 200 room 3/4-star resort/spa hotel geared towards the domestic market with shopping/commercial centre, sports facilities, beach club and marina. The Kasaba Bay Lodge and Kaunda's State House and Chalet will form part of the redevelopment.

Feasibility studies and a site development brief will be required to:

- Specify development land parcels for different uses.
- Assess market demands.
- Define development potential, densities and constraints.
- Incorporate design guidelines and illustrations.
- Develop implementation strategies in conjunction with tourism investment inputs.

*See Guidelines:*

*Site Development Planning*

### **3. Nsumbu Community Development Programme**

The aim of the programme will be to provide the local communities with the opportunity to make known their feelings and fears, hopes and aspirations, suggestions and preferences to Government. There will be opportunities to develop a range of projects including the creation of community-based products, community involvement in resource management for nature sites, joint ventures between communities and heritage or nature sites on provision of services, and business and job opportunities for residents in local communities.

*See Guidelines:*

*Community Action Planning*

**Table 6.16: Nsumbu TDA 5-year action plan**

TAA	Activity	Responsibility		US\$ 000's
		Lead	Support	
Nsumbu NP Improvement	Planning, design and project dossier/input to GMP. Say 2 m/m 1 <sup>st</sup> phase site works	MoTA	DNPW	40
Kasaba Bay Tourism Resort	Concept/pre-feasibility study, development brief and investment package Say 2 m/m	MoTA	ZDA Local Municipality	40
Nsumbu Community Development Programme	Planning, design, workshops and assistance. Say 2 m/m	MoTA	CRB's	45

## **6.2.9 Ndola TDA**

### **1. Existing Situation**

The Copperbelt is Zambia's industrial heartland and has been since the early 20th Century. The Ndola, Kitwe and Chingola area is dotted with mines producing copper and cobalt on an internationally important scale. The Konkola Deep Mine and the Nchanga Open Pit Mine, both near Chingola are

respectively the second deepest in Africa and the second largest open cast mine in the world but mining has also been moving beyond the traditional mining territory westwards to Solwezi with huge new mines being sunk up to 100 km beyond the town. Ndola is the provincial capital of the Copperbelt.

Ndola and surrounding towns are long-standing mining communities which excavate and process the various ores and require a range of supporting businesses and the government entities associated with its regional political and economic importance. Mining dominates the economic and physical landscape and the presence of tourism product to attract visitors is limited. Business tourism by contrast is strong from both domestic and international sources and justifies the city's international airport.

The major tourist attraction is Lake Kashiba, near Mpogwe. This is a large natural sunken lake which is popular for boating and fishing. Another sunken lake – Lake Chilengwa is located south of Ndola. Bird watching is popular at Chembe Bird Sanctuary and in nearby forests. There is also a chimpanzee refuge in the north. There are also a number of small heritage sites and attractions including the Dag Hammarskjöld Memorial, the Copperbelt Museum of geology and cultural history and the old Slave Tree.

Ndola does have a number of good quality hotels that attract the business market with two new international branded hotels, a Protea-Marriot and an Urban Hotel having opened in the last year.

Simon Mwansa Kapwepwe International Airport (Ndola,) the current airport, has limited terminal and passenger handling facilities but plans have been announced to replace this facility with a completely new airport to be known as The Copperbelt International Airport with a capacity of 1 million passengers per annum. This new development will be built on a site that is midway between Ndola and its neighbouring town Kitwe.

The market for this TDA is dominated by domestic and international business travellers with very few international leisure visitors reaching this region.

## **2. Development Potential**

### ***Overall Goal***

Promote Ndola as the international business and shopping gateway from the north, with the long term aim as a possible sports and medical tourism destination

### ***Market Mix***

- Primary Markets
  - International business market
  - Domestic business market
- Supporting Markets
  - Domestic short break market

### ***Indicative number and style of new rooms required to meet demand by 2038***

- 300 rooms @ 3-4 Star standard in 4 hotels of 75 rooms each targeted at the international and domestic business markets and provision of a pool and a gym should be integrated into the hotels.

### ***Key Assumptions***

- That suitable hotel development sites can be found either in the city or on the outskirts.

## **3. Key Issues**

Key issues include:

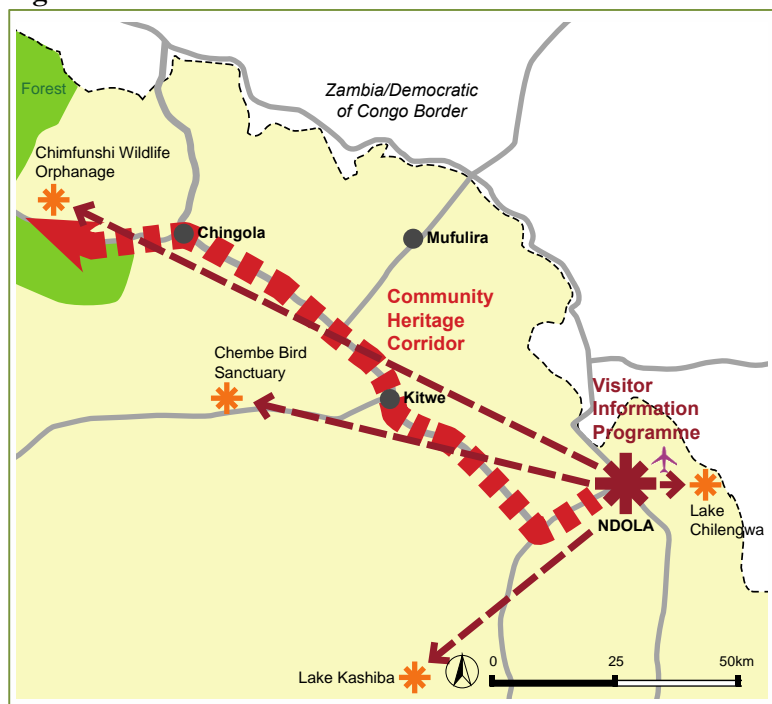
- The area is in the far north of the country and away from the major tourism anchors of the country. It will be difficult to create good linkages with the overall Zambia tourism product.
- Market demand for tourism leisure hotels and resorts will be limited, however, there may be further opportunities for the business traveller.
- Ndola currently is impacted by significant advertising clutter.
- Possible environmental impacts from further mining development.

#### 4. Tourism Action Areas

Ndola and surrounding towns are mining communities with supporting businesses and government entities but with limited tourism product. The area is in the far north of the country and far away from the major tourism anchors of the country. But has good domestic tourism potential.

The following TAA will help promote the town and surrounding tourism sites:

**Figure 6.36: Ndola TDA**



##### 1. Ndola Visitor Information Programme

The tourism value of Ndola is limited with the individual heritage and nature sites within and surrounding the town, for the most part, are not sufficiently strong attractions in themselves. There is therefore the need for integration, both in delivering product experiences and raising awareness about and promoting value of exploring and discovering the Ndola tourism product.

Furthermore, a well-co-ordinated visitor information package would promote Ndola's mining heritage enabling visitors to learn more about and fully appreciate the town's history.

The intent of this Programme is therefore to:

- Significantly increase awareness concerning the regions mining heritage, and surrounding nature based sites.
- Establish a set of touring products which are emphasised in marketing lure pieces and an 'official guide' to heritage and nature based tourism in Ndola and surrounds.

Three tours have been identified for promoting the 'discovery experience':

- Heritage based tour – A trail that traces the mining history of the town and region providing an integrated set of experiences at several working mines and other heritage sites.
- Nature based tour – A focus on the surrounding tourism attractions including Chembe Bird Sanctuary, Cimfunsi Wildlife Orphanage and the sunken lakes of Chilengwa and Kashiba.

Community development sites and programmes may also be included in the discovery experience which will result in positive economic benefits to the communities and leave visitors with a better understanding of the significant heritage of Ndola particularly, and Zambia as a whole.

A tourism visitor centre is proposed at a central venue, which will be the focus for the Visitor Information Programme. The centre will not only promote Lusaka, but also the heritage, nature and community sites within each of the TDAs.

The proposed Community Heritage Corridor (see below) will incorporate the Visitor Information Programme

*See Guidelines:*

*Site Development Planning*

*Community Action Planning*

**Table 6. 17: Ndola TDA 5 year action plan**

TAA	Activity	Responsibility		US\$ 000's
		Lead	Support	
Ndola Visitor Information Centre	Planning, design and project dossier Say 2 m/m Architecture and 1 <sup>st</sup> phase site works	MoTA	Ndola Municipality	40

## 6.2.10 Kafue Flats TDA

### 1. Existing Situation

The Kafue Flats TDA includes the Lochinvar National Park which lies about 200 km to the west of Lusaka on the Kafue River's floodplain. Blue Lagoon National park is to the north and shares a similar ecosystem, geography and Ramsar designation.

The two parks have received limited attention in the past including WWF drawing up conservation plans for the area but nothing has been finalised leading to a collapsing of infrastructure and high levels of poaching. Hunting takes place in the neighbouring GMA's

Both parks have flat open countryside/wetlands, which provide good viewing of wildlife and birdlife, albeit that animal numbers are low they do include the endemic Kafue lechwe. The waters attract a great variety of migrant birds and are host to pelicans, flamingos, storks, cranes and several varieties of eagles. The waters have traditionally been a ready source of fish for local people yet this has become increasingly commercialised particularly on the Lochinvar side and is leading to damaged roads within the parks from overweight trucks transporting fish out of the Park.

Lochinvar possess a number of heritage features including the Gwisho and Bwanda Hot Springs, the site of an iron-age village, an outcrop of rocks called Drum Rocks and an old hollowed out baobab tree with local cultural significance. There is only very limited accommodation. The original farm house built by the first European owner of the area is currently being renovated into a guesthouse with about half a dozen rooms.

There is no air access to either side of the Kafue Flats while access by road to Lochinvar is best approached from Lusaka or Livingstone via Monze and proposed upgrading of the road from Monze to Chitonga will improve access to the Park. Roads within the Park are in poor condition especially due to

fishing trucks.

The market for both parks is limited to small numbers of domestic visitors who may be either fishermen, hunters or birders. Many commercial fish traders use the Parks for access to the fish stocks in the wetlands.

## **2. Development Potential**

### ***Overall Goal***

Develop Lochinvar National Park as a domestic destination area providing a range of facilities. In the longer term, promote the combination of Lochinvar National Parks and Blue Lagoon National Park as a large wetland parks for world class bird watching.

### ***Market Mix***

- Primary Markets
  - International eco-tourist/birding markets
  - Domestic eco-tourist/birding markets
- Supporting Markets
  - International self-drive market
  - Domestic self-drive market

### ***Indicative number and style of new rooms required to meet demand by 2038***

- 400 rooms @ 3 Star standard in 4 larger lodge style hotels with 100 rooms each with waterside positions.
- 300 rooms @ 3 Star standard in 6 smaller lodge style hotels with 50 rooms each (including a single eco-lodge incorporated within a larger Bird Watching Centre) with wetland views.
- 300 rooms @ 3 Star standard in 15 eco-lodges with 20 rooms each in secluded locations with fine views.

### ***Key Assumptions***

- That all components of the Lochinvar National Park Improvement Plan are implemented.
- That road access to Blue Lagoon National Park from the M9 Lusaka road is rapidly improved.

## **3. Key Issues**

Key issues include:

- Poaching and over fishing is a major challenge together with encroachment into the parks by domestic animals (the park used to be an old cattle range) - need to sensitise and encourage further involvement of communities in conservation.
- Unregulated fishing camps and fishing trucks driving through the parks.
- Road access, signage and interpretation of the heritage sites are required.
- Poor promotion of both parks

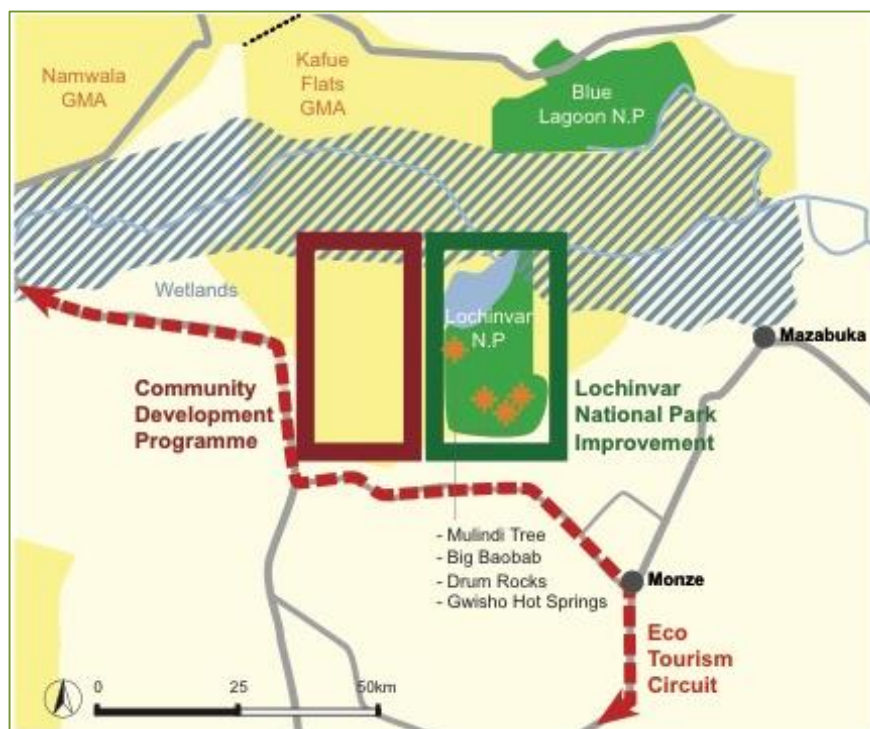
## **4. Tourism Action Areas**

Currently the area suffers from poor road access. However, the associated Kafue Flats Ecotourism Circuit (section 6.3) will improve access and promote the TDA.

Two TAAs are proposed to begin the regeneration of the area:

1. Lochinvar National Park Improvement Programme
2. Kafue Flats Game Management Area Community Development Programme

### **Figure 6.37: Kafue Flats TDA**



### ***1. Lochinvar National Park Improvement Programme***

The Lochinvar GMP was prepared in 2004 and therefore is in need of review. There is no GMP in place for the adjoining Kafue Flats GMA. The Park has to some extent been neglected and has suffered from ongoing land use conflicts between environmental conservation, fishing and cattle/goat grazing. However, the potential for getting the park back on track and as a key tourism attraction is significant. The Park forms part of the Kafue Flats - an extensive flood plain of the Kafue River System, and is located within the tourism development 'triangle' of Lusaka – Livingstone - Kafue National Park.

Projects will include:

- Renovation of the main gate and information centre.
- All weather road to accommodate fisheries industry from which game loops, picnic areas and observation towers can be accessed.
- Improved signage and interpretation of the existing heritage sites.
- Bird watching centre and eco-lodge to provide interpretation and awareness of the bird life and habitat.

The Bird watching centre and eco-lodge consisting of up to 50 rooms, will have considerable appeal to the international bird watching market and general visitor and would charge a premium for its location within the Park.

Besides the eco-lodge, there is potential for further lodges to be located within the Park and adjoining GMA, geared towards the domestic market. Accommodation will be provided in environmentally appropriate structures – possibly tree house design, fitting unobtrusively into the landscape.

*See Guidelines:*

*Site Development Planning*

### **2. Kafue Flats Game Management Area Community Development Programme**

It will be important to encourage widespread community participation in the development process, particularly within the Kafue Flats GMA. Here, there are conflicts between hunting, poaching, grazing,



fishing and tourism. The area has developed with no planning and consequently has spread out with communities sprawling over the GMA. In the future, the communities will benefit from modern amenities but at present, the development sprawl does not facilitate improvements and rural regeneration.

The problem is not as acute as in Lupande GMA, but existing and new development must be concentrated within rural and urban villages and be capable of being well-served by infrastructure. Efficient development must be a cornerstone of Zambia's future urban policy.

From a tourism perspective, one of the initial challenges will be to increase awareness of the tourism potential of the Kafue Flats through existing CRBs and assist them, where necessary, to establish working organizations with whom to interact on community tourism planning. In addition, the process must also accommodate the interests of individuals in local communities who may wish to pursue particular tourism projects or businesses.

*See Guidelines:  
Community Action Planning*

**Table 6.18: Kafue Flats TDA 5-year action plan**

TAA	Activity	Responsibility		US\$ 000's
		Lead	Support	
Lochinvar NP Improvement	Planning, design and project dossier/input to GMP. Say 2 m/m 1 <sup>st</sup> phase site works	MoTA	Local Municipality	40
Kafue Flats GMA Community Development Programme	Planning, design, workshops and assistance. Say 2 m/m	MoTA	MoTA Local Municipality	45

### 6.2.11 Longer term TDAs

Four further TDAs have been identified for future planning:

#### 1. Bangweulu TDA

This TDA is wider ranging and captures a diverse number of natural and cultural heritage sites that in combination represent a compelling tourism circuit of potential interest for both domestic and international visitors.

The TDA includes the environmentally important Bangweulu Wetlands which cover an area similar in size to the Okavango Delta in Botswana with its own endemic species of antelope, the Black Letchwe, and is a breeding ground for one of Africa's rarest birds, the Shoebill. Three National Parks, Kasanka, Lavushi-Manda and Isangano are also included and while the latter is neglected and vulnerable to human encroachment, Kasanka has international recognition for the phenomenon that is the annual bat migration between September and November and Lavushi-Manda is recognised for its rocky and undulating scenic quality despite its current limited wildlife.

Two further important cultural heritage sites of national and international significance are the David Livingstone Memorial and the unique and historical Shiwang'andu Manor House. The recently built Nakapalya cultural village close to Lavushi-Manda National Park is open but under strain while much earlier expressions of local cultural life are found in a number of remote rock art sites near Kapishya where natural hot springs can also be visited. Several waterfalls are located at Kundalila and Mutinondo where hiking trips can be arranged around a large private reserve.

Accommodation provision in the TDA is limited but characterful ranging from rooms at Shiwang'andu and neighbouring Kapishya Springs to a small lodge at Mutinondo, the rebuilt luxury Shoebill Lodge in Lavushi-Manda and a range of lodge and dormitory accommodation at Kasanka National Park. Camping is also possible at most of these locations.

Access to the wider TDA is generally good via the Great North Road but driving deeper into the area, into the parks and to locations like the David Livingstone Memorial need good 4x4 capability and better signage. Lavushi-Manda has access all year round but access within the wetlands and other parks can be difficult.

Tourism development opportunities include:

- Promoting the area for ‘off beaten track’ and self-drive market linking South Luangwa, Lavushi-Manda and Kasanka NPs.
- Promoting Kasanka National Park for special interest – birding (bird hides, platforms) and heritage.
- Promoting Lavushi-Mandu National Park for adventure – hiking, mountain biking, rock climbing.
- Promoting game ranching in the smaller GMAs.

The proposed Bangweulu Adventure and Heritage Tourism Circuit described in the next section will begin to further open up and promote this area for development.

## **2. North TDA**

The Tourism Development Area covers a wide ranging stretch of Northern Zambia which reaches across much of the northern border with Tanzania and Democratic Republic of Congo (DRC) including the National Parks of Nsumbu, Mweru Wantipa and Lusenga Plain.

Nsumbu National Park is extremely attractive and unspoilt. Mweru Wantipa National Park borders Lake Mweru, which Zambia shares with the DRC, is remote and receives very few visitors. Lusenga Plain is less than 100 km to the south and is also remote, totally undeveloped and forgotten but has some unique geological features.

Lake Tanganyika provides an excellent tourism resource for sport fishing, angling, diving, kayaking and boating. Visitors are few and either travel north by road from Lusaka or enter from Tanzania by ferry boat across Lake Tanganyika into Mpulungu, by road through the Nakonde border crossing or by train, nearby at Tunduma. The Lake is not the only major natural resource with tourism potential in this region since a number of spectacular waterfalls are located here including the Kalambo Falls on the border with Tanzania which has the second highest drop in Africa (twice the height of Victoria Falls), and the remarkable sequence of three falls at Lumangwe, Kabwelume and Kundabwika whose river marks the eastern boundary of Lusenga National Park.

The region also includes a number of important cultural and heritage features and sites and is also noted as a centre for both tea and coffee production. The tourism market for this area is mainly the expatriate self-drive visitor with time to enjoy the natural beauty of the region, sightseeing including the waterfalls, enjoying watersports and relaxing at Lake Tanganyika.

Tourism development opportunities include:

- Potential waterfront destination around Kasaba Bay with a series of lakeside lodges/resorts.
- Redevelopment of the airstrip at Kasaba Bay or relocate to allow for extensive beach resort
- Developing new infrastructure.
- Improving road from Kasama to Nsumbu will unlock domestic and international tourism.
- Promoting area to self-drive market once upgraded roads are complete creating a series of circuits that link lakes and waterfalls.
- Promoting the lakes and waterfalls as part of safari product (Serengeti – Tanganyika – Victoria Falls).

- Promoting game ranching in the GMAs.

The proposed Northern Lakes and Waterfall Tourism Circuit described in the next section will begin to further open up and promote this area for development.

### **3. North West TDA**

The far north west of Zambia is remote and currently less accessible by good roads and expensive by charter flight but roads are being improved and the adventurous can be attracted by better knowledge, understanding and ‘packaging’ of the variety of natural and cultural heritage features and sights that may be seen.

The source of the Zambezi is a visit that every Zambian should be able to make and it is no less iconic for the international visitor and both will enjoy a number of cultural traditions like the fabled and colourfully clad Makishi Dancers, perhaps visit and stay/camp at the renowned Nchila Wildlife Reserve. The Kifubwa Stream Rock Shelter, an enigmatic rock art site near Solwezi continues the thread of Zambian cultural heritage.

Tourism development opportunities include:

- Promoting the Source of the Zambezi is an important and potential pilgrimage site for Zambians – could be developed further with trails and ‘access’ to the water.
- Promoting off-the-beaten-track circuits including The Source and other cultural sites and waterfalls.
- Link through to Angola.
- Potential for ‘lessons learned’ community development/management of wildlife areas through Nchila Wildlife Reserve.

The proposed Community Heritage Corridor described in the next section will begin to further open up and promote this area for development.

### **4. West TDA**

The west of Zambia is remote and difficult to reach and although the south western part closest to Livingstone should be the easiest, the absence of major towns and economic significance has led to neglect, reinforced by the areas’ proximity to the civil war in Angola and unrest in Namibia’s Caprivi Strip which suggested that the area was unsafe. The war finished many years ago but the impact upon wildlife in Sioma Ngwezi National Park is taking time to recover and infrastructure is very limited just as it is at Ngonye National Park, so competing against Botswana, Zimbabwe and Namibia is currently difficult.

The Park has been incorporated into the KAZA Transfrontier Conservation Area which is designed to allow migratory animals to move freely between the various Parks. Roads are being improved, the route from Sesheke to Mongu is newly tarred and a new bridge built over the Zambezi just beyond the spectacular Ngonye Falls but despite a good road from Livingstone to Kazangula and the bridge over the Zambezi here well underway, the road from here to Sesheke is very poor. A new road upgrading is being proposed for a route which will link the Sesheke to Kazangula road to the M9 Mongu to Lusaka road enabling a road circuit to be created.

Accommodation is also limited in the Wilderness Circuit Area with two small hotels available in Sesheke, a handful of small lodges on the Zambezi between Sesheke and Ngonye, a new small lodge by the new bridge close to Ngonye Falls and an important new luxury lodge opened in Liuwa Plain National Park.

Tourism development opportunities include:

- Sioma Ngwezi National Park and West Zambezi GMA are now incorporated into the KAZA

peace park connecting the area with Botswana, Zimbabwe, Angola and northern Namibia which allows for wildlife corridors. This should help increase the elephant population in Sioma Ngwezi National Park if poaching is under control.

- Promoting a regional travel circuit through Katima Mulilo entry route and onto Kafue and Livingstone.
- Potential for Ngonye Falls to become a tourism anchor for the area and once park is restocked, the areas becoming a regional safari zone.

The proposed Western KASA Tourism Circuit described in the next section will begin to further open up and promote this area for development.

## **6.3 Linking the TDAs and TAAs**

### **6.3.1 The Community Heritage Corridor**

In order to attract more international and domestic visitors to the north western part of the country and induce them to stay longer, and be convenient for tour operators, the many heritage, nature and community development sites will be packaged and promoted together. It will be the ‘sum of the parts’ that will make the north west of interest – an undiscovered travel circuit.

The route will include:

- The cluster of tourism sites in the North West - Source of Zambezi, Kashanga Rocks and Nchila Wildlife Reserve.
- The many forest areas including Nyambwezu Falls.
- The cultural sites in Solwezi.
- The cluster of nature sites of Chimfunshi Wildlife Orphanage, Chembe Bird Sanctuary and Lake Chilengwa
- The heritage sites within the towns of Ndola, Chingola, Kitwe, Mufulira, Mansa and Samfya.

The overall concept therefore will comprise of several components:

- A major ‘discovery’ route which serves as a product in itself integrating many of the heritage, nature and community tourism sites, and as a lure piece for further exploration by visitors (a one, two or three-day route).
- Designation of ‘destination’ areas which offer a concentration of tourism sites and increase the incentive to visit the destination areas. Through clustering some of the towns and villages it will be possible to create larger programmes or festivals out of a series of individual local events through coordinating dates, content and publicity.
- Speciality ‘discovery routes, usually trails which are based on specific themes and tell an integrated story about a particular aspect of the Corridor.

The Corridor is not intended to supplant private sector tour operator activity. Rather it will significantly enhance this part of the tourism business by providing better and more relevant information to visitors.

The Community Action Planning Guidelines will provide support and encouragement to local people to become actively involved in the provision of tourist facilities and visitor accommodation along the Corridor through the establishment of guest houses, bed and breakfast and similar types of facility. Favourable conditions should therefore be given to small-scale tourist developments, particularly where they will be owned and managed by residents and will provide local employment and economic benefit for local people. In return, there must be a greater willingness on the part of those involved in community tourism to work with government agencies in training and marketing initiatives and in ensuring that service standards are maintained.

To implement the Community Heritage Corridor, the following components are recommended:

- Corridor routing – establish a committee and refine route including assembly of all data required.
- Corridor signage – services for logo design, signage construction and installation.
- Marketing literature – incorporate into overall marketing plan.
- Corridor map – design, preparation and printing and establish distribution plan.
- Corridor destinations – incorporate community tourism planning results.
- Corridor information panels – design, preparation and installation.

Figure 6.38 (a): Community Heritage Corridor West

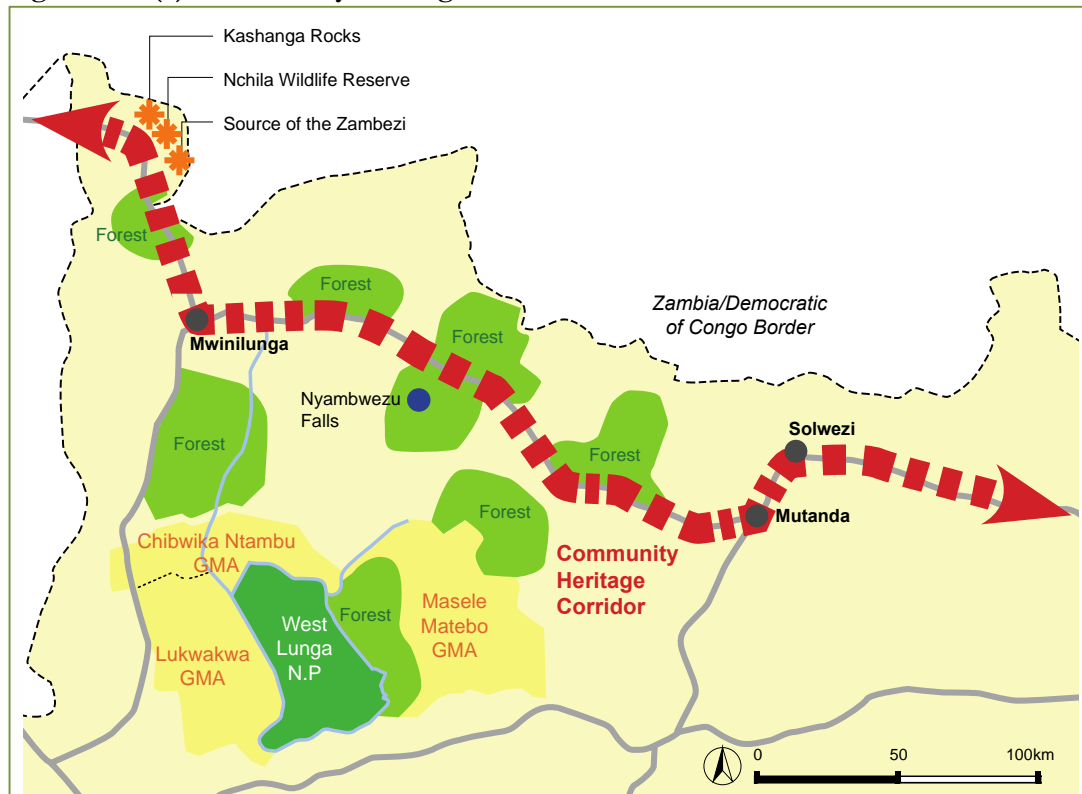
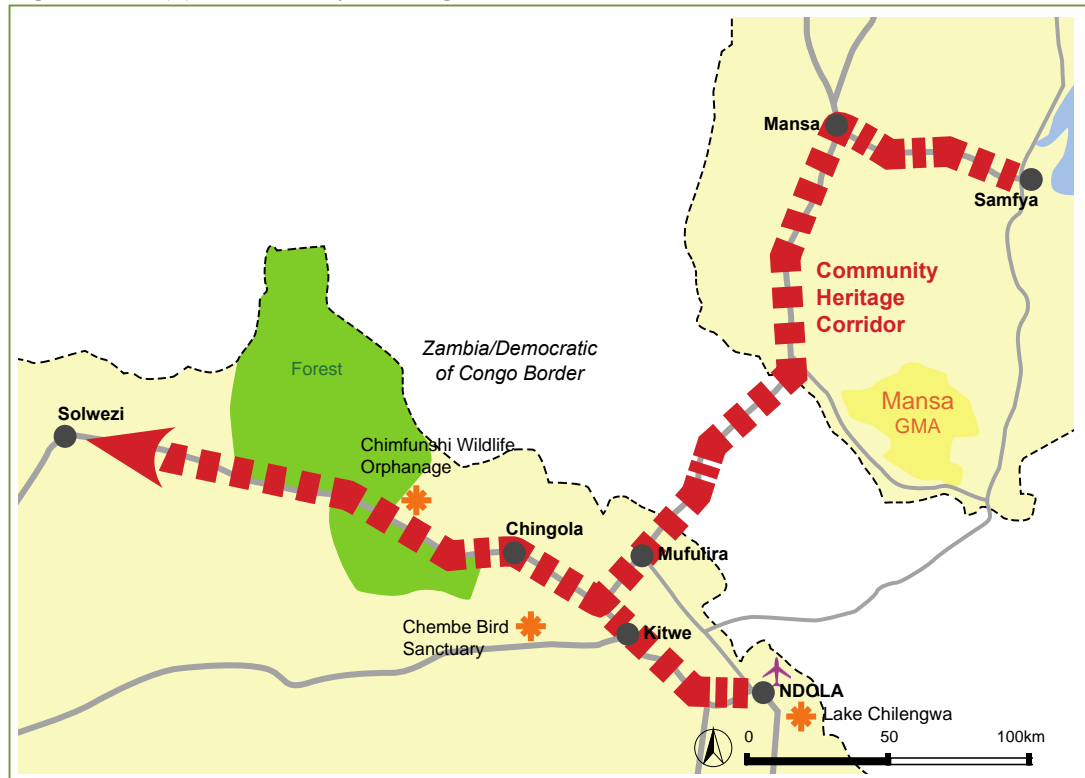


Figure 6.39: (b) Community Heritage Corridor East



### 6.3.2 Tourism Circuits

Similar to the Community Heritage Corridor, the Tourism Circuits will package and promote the many heritage, nature and community development sites in one programme with the full involvement of local communities.

Some of the circuits and trails may be made more attractive by developing and building on themes likely to interest the visitor. Themes enable product differentiation. For example, the Bangweulu Adventure and Heritage Tourism Circuit may include a historic theme incorporating the David Livingstone memorial and Shiwang'andu house. The Tourism Circuit will also include an adventure/nature theme incorporating the several waterfalls and hiking in Mutinondo. This will allow the visitor to choose a particular experience (or combine experiences).

Within this framework, a trail system will be developed to offer a mix of recreational settings from remote to rural village.

Likewise, with the Community Heritage Corridor, the community will be fully engaged in developing, managing and benefiting from the Tourism Circuits through the provision of tourist facilities, visitor accommodation and guiding.

Four Tourism Circuits are proposed:

- The Kafue Flats Ecotourism Circuit - linking Livingstone, Kafue National Park and Lochinvar National Park. At present the proposed route is lacking in good quality road connections, directional signage and roadside facilities that will provide the conditions to allow the visitor to stop en-route for a break.
- The Western Wilderness Tourism Circuit – linking Livingstone, Sioma Ngwezi National Park, Ngonge Falls and surrounding area. A new road upgrading is being proposed for a route which will link the Sesheke to Kazangula road to the M9 Mongu to Lusaka road enabling a road circuit

to be created. Interpretation, trail building, facilities improvement, signage, roadside facilities and provision of accommodation and/or campsites will need to be addressed before the circuit can be developed.

- Bangweulu Adventure and Heritage Tourism Circuit - linking Lavushi-Manda National Park, Kasanka National Park, Bangweulu GMA and surrounding heritage sites. This proposed circuit has an interesting mix of birding, adventure activities and cultural heritage, located in separate areas which are in some instances quite far apart. Roads to several features off the main roads and the roads, signage and trails within Lavushi-Manda and Kasanka National Parks need to be improved. The important David Livingstone Memorial site and the causeway/lookout over the wetlands in the Bangweulu GMA where the Shoebill bird is found are both difficult to find and access.
- Northern Lakes and Waterfall Tourism Circuit - linking Samfya, National Parks, lakes and Kasaba Bay. This circuit is in another remote and undeveloped region of the country, far from source markets, with limited air access and poor road access. The proposed circuit will further expand the tourism development options in this currently remote and undeveloped area but much will be needed to improve accessibility, GMA and National Park wildlife levels, road signage inside and outside the Parks and GMA's, park trails and other support infrastructure including site interpretation, lodge accommodation, campsites and, roadside facilities.

**Figure 6.40: : Kafue Flats Ecotourism Circuit**

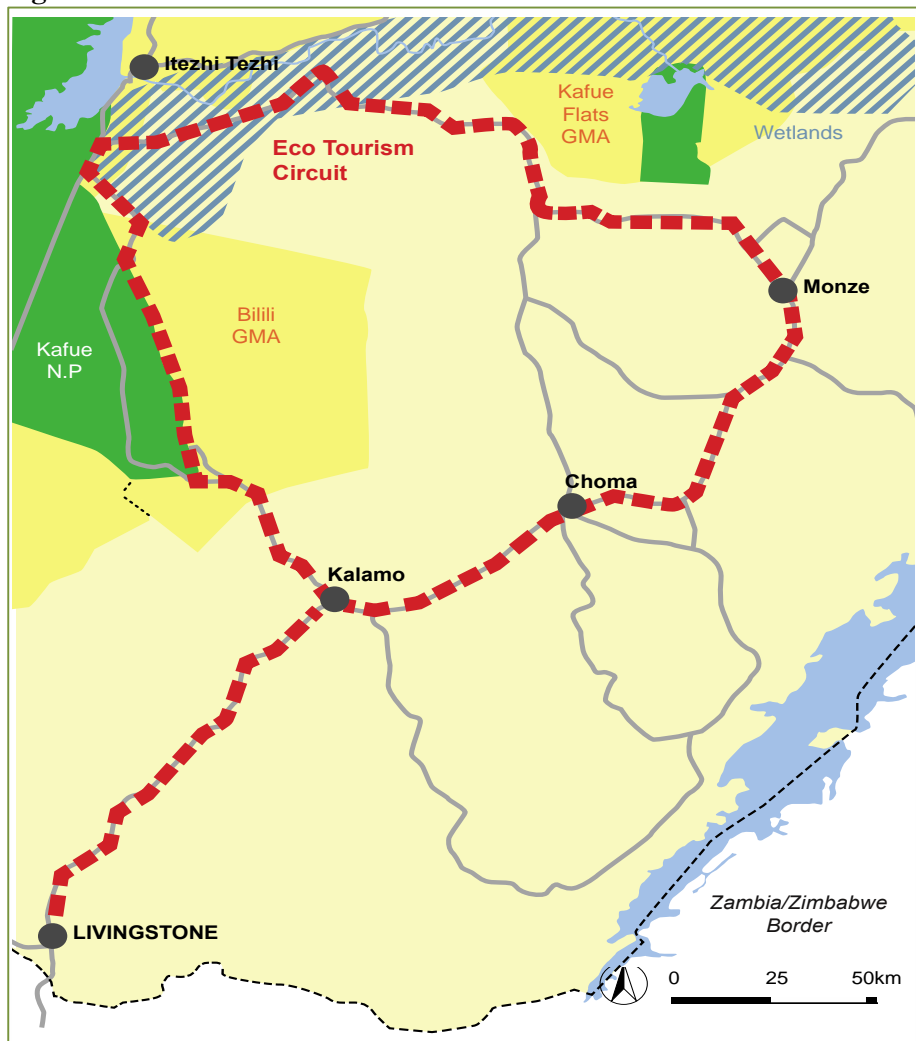


Figure 6.41: Western KAZA Tourism Circuit



Figure 42: Northern Lakes and Waterfall Tourism Circuit

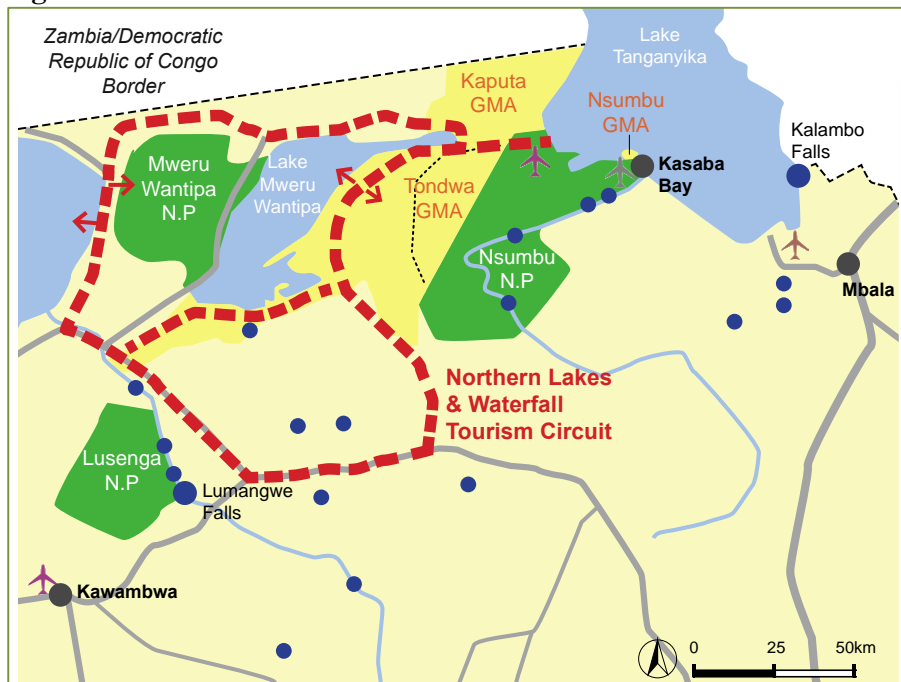




Figure 6.23: Bangweulu Adventure and Heritage Tourism Circuit

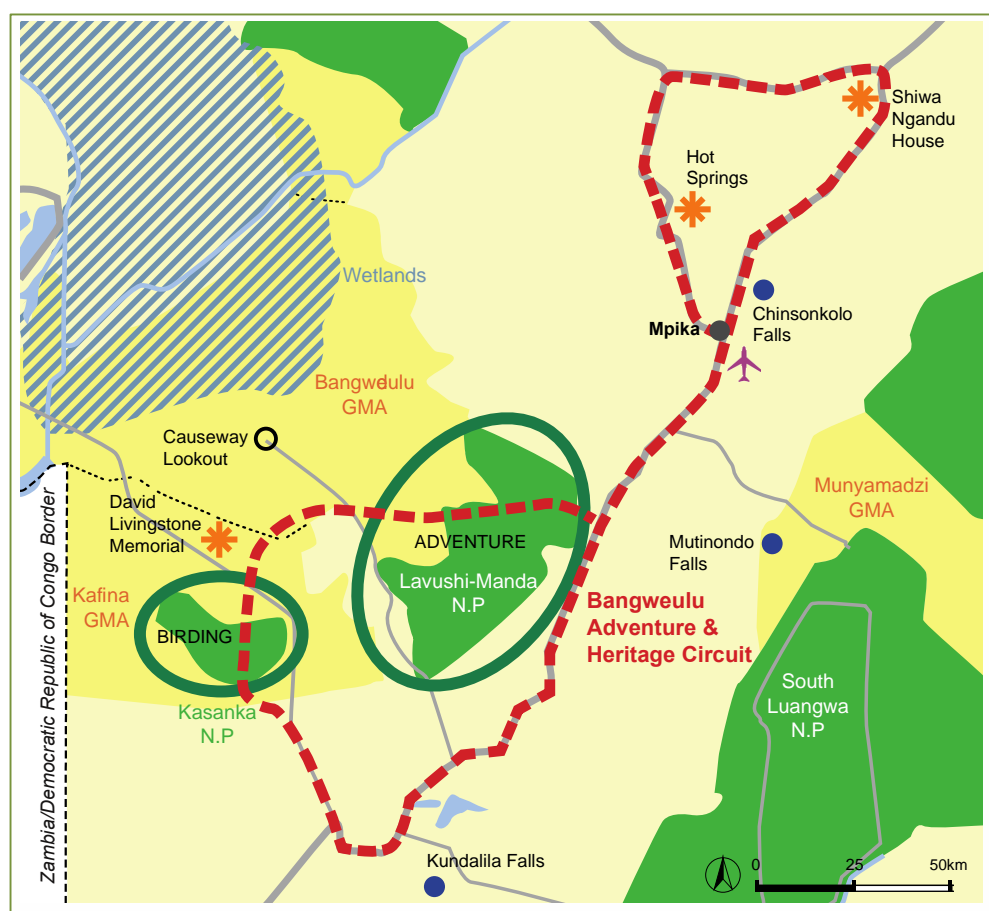


Table 6.19: Community Heritage Corridor and Tourism Circuits TDA 5 year action plan

TAA	Activity	Responsibility		US\$ 000's
		Lead	Support	
Community Heritage Corridor	Planning, design, workshops and assistance. Say 3 m/m Architecture and 1 <sup>st</sup> phase site works	MoTA	CRB's Local Municipalities	60
Kafue Flats Ecotourism Circuit	Planning, design, workshops and assistance. Say 2 m/m	MoTA	DNPW CRB's	45
Western KAZA Tourism Circuit	Planning, design, workshops and assistance. Say 2 m/m	MoTA	DNPW African Parks	45
Bangweulu Tourism Circuit	Planning, design, workshops and assistance. Say 2 m/m	MoTA	Kasanka Trust African Parks	45
Northern Lakes and Waterfall Tourism Circuit	Planning, design, workshops and assistance. Say 2 m/m	MoTA	DNPW	45

## Chapter 7: Implementation Action Plan

### 7.1 Strengthening capacity to ensure effective implementation monitoring and evaluation of the plan

There is ample evidence in Zambia and elsewhere of tourism-related plans that have been drafted but not implemented. The lack of effective implementation is the most important shortcoming identified in previous tourism plans and should be addressed as a matter of priority. Bold steps will be taken to ensure the implementation of this ZTMP, including:

Actions:

- ☞ *Establish a project management unit (PMU) within MoTA, reporting directly to the PS:* Continued growth in the tourism sector will demand resources, capable management and vision. Ideas and aspirations for tourism development contained in the ZTMP, however visionary, are only as good as the means of implementing them. It is important therefore, that the PMU, once established, be tasked with implementing the actions proposed in this plan.

The overall role of the PMU is to supervise the implementation of plans and projects contained within the ZTMP, evaluate and monitor implementation progress at both national and provincial/district level and ensure that the agreed schedules of activities are implemented. More specifically the unit should have the following key functions, including:

- Coordinating implementation of actions contained in ZTMP by the various departments and agencies in MoTA, the provincial and local authorities and other institutions
- Monitoring and advising in implementation of ZTMP and other tourism plans
- Ensuring finalisation of GMPs for all national parks and GMAs
- Acting as a secretariat for the inter-stakeholder Tourism Liaison committee

Such a unit will only be successful if it is equipped with highly skilled and professional staff, is functionally independent and is mandated at the highest level. The development process however, must be localised. Although the overall planned approach will come from the top, the detailed planning and management process must involve local area bodies and the community, and the PMU should play a crucial role

- ☞ *Establish a technical assistance programme (TAP) within the PMU:* Technical assistance and advice is recommended to strengthen and integrate the tourism sector at all three levels:
  - At provincial level to assist liaison between public agencies and private sector in the further development of the tourism product and the preparation of TDAs, TAAs and tourism circuits.
  - At local level to encourage involvement in the tourism sector, promoting the principles of tourism, education, training and resource management and developing community tourism projects of their own.
  - At private sector level to assist and promote local tourism associations.

### 7.2 Action plan

The following Action Plan summarised the goals, strategies and actions proposed in the Master Plan. It also indicated the phases in which they should be achieved, who should carry them out and how much they will cost. Implementing the plan will require a substantial investment by both the public and private sectors over the five-year period. Importantly, the implementation action plan should serve as a framework for monitoring progress with implementing the ZTMP and for evaluating the extent of such progress. As such it sets out success indicators, which as far as possible provide measurable targets to achieve.

Table 7.20: Five (5) Action Plan

No	Strategy	Project/Action	Phase			Cost Estimate (Phase 1) (US\$)	Responsibility		Success Indicators (Phase 1)
			1	2	3		Lead	Support	
5.1	<b>Goal 1: Develop innovative tourism products and attractions</b>								
5.1.1	<b>Implementing Tourism Action Areas in identified TDA's</b>	(i) Prepare and develop Lusaka as Zambia's MICE hub <ul style="list-style-type: none"> <li>○ Lusaka Visitor Information Programme</li> <li>○ Rehabilitation of Kabwata Cultural Village</li> <li>○ Improvement of Lusaka NP</li> <li>○ Lusaka Urban Design Strategy</li> </ul>	X	X	X	165,000 technical preparation Capital costs to be determined	MoTA	<ul style="list-style-type: none"> <li>– Municipality of Lusaka</li> <li>– HBM</li> <li>– Mulungushi Conference Centre</li> <li>– DNPW</li> <li>– ZDA</li> <li>– ZTA</li> <li>– TCZ</li> </ul>	<ul style="list-style-type: none"> <li>– 15% p.a. growth in MICE visitors</li> <li>– Master Plan visitor growth targets met at heritage sites on the Lusaka and Livingstone tour programme routes, at the Cultural Villages and Lusaka and Victoria Falls NP's.</li> </ul>
		(ii) Develop Livingstone as Zambia's international tourism entry hub <ul style="list-style-type: none"> <li>○ Livingstone Visitor Information Programme</li> <li>○ Livingstone Town Centre Urban Design Strategy</li> <li>○ Improvement of Mosi-oa-Tunya/Victoria Falls NP</li> <li>○ Livingstone Hillside Resort</li> <li>○ Livingstone Cultural Village</li> <li>○ Livingstone Community Development Programme</li> </ul>	X	X	X	240,000 technical preparation Capital costs to be determined	MoTA	<ul style="list-style-type: none"> <li>– Municipality Livingstone</li> <li>– DNPW</li> <li>– ZTA</li> <li>– LTA</li> <li>– CRB's</li> </ul>	<ul style="list-style-type: none"> <li>– Livingstone hillside resort being built and new hotels opening in both cities</li> <li>– Positive visitor survey feedback to both cities improved appearance</li> </ul>
		(iii) Develop Kafue NP and Lake Itezhi-Tezhi as larger scale international safari centre and resort hub <ul style="list-style-type: none"> <li>○ Kafue NP infrastructure improvement</li> </ul>	X	X	X	285,000 technical preparation Capital costs to be determined	MoTA	<ul style="list-style-type: none"> <li>– DNPW</li> <li>– ZDA</li> <li>– CRB's</li> </ul>	<ul style="list-style-type: none"> <li>– Construction underway on both resorts with rooms open at Itezhi Tezhi</li> <li>– Several new tourism loops built</li> <li>– Early stage Community</li> </ul>

No	Strategy	Project/Action	Phase			Cost Estimate (Phase 1) (US\$)	Responsibility		Success Indicators (Phase 1)
			1	2	3		Lead	Support	
		<ul style="list-style-type: none"> <li>o Itezhi Tezhi Lakeside Resort</li> <li>o Chunga Tourism Resort</li> <li>o Itezhi Tezhi Community Development Programme</li> </ul>							Development Programme (CDP)
5.1.1	Implementing Tourism Action Areas in identified TDA's (cont.)	(iv) Strengthen and expand tourism in Luangwa Valley <ul style="list-style-type: none"> <li>o South Luangwa NP infrastructure improvement</li> <li>o North Luangwa NP infrastructure improvement</li> <li>o South Luangwa NP expansion programme</li> <li>o Lupande GMA and Munyamadzi GMA Community Development Programmes</li> </ul>	X	X	X	155,000 technical preparation Capital costs to be determined	MoTA	<ul style="list-style-type: none"> <li>- DNPW</li> <li>- SLCS</li> <li>- FZS</li> <li>- CRB'S</li> </ul>	<ul style="list-style-type: none"> <li>- GMP approved and functional</li> <li>- Master Plan visitor growth targets met in passenger arrivals at Mfuwe Airport and in visitor numbers to the National Park</li> <li>- Early stage CDP's are agreed</li> </ul>
		(v) Ensure sustainable tourism development in Lower Zambezi <ul style="list-style-type: none"> <li>o Lower Zambezi NP infrastructure improvement</li> <li>o Chiawa GMA Community Development Programme</li> </ul>	X	X		115,000	MoTA	<ul style="list-style-type: none"> <li>- DNPW</li> <li>- CLZ</li> <li>- CRB's</li> </ul>	<ul style="list-style-type: none"> <li>- GMP approved and functional</li> <li>- Sustained growth in visitor arrivals at the NP</li> <li>- Early stage CDP agreed</li> </ul>
		(vi) Package and promote Samfya and Bangweulu <ul style="list-style-type: none"> <li>o Samfya Corniche improvement</li> <li>o Samfya Peninsula Beach Park</li> <li>o Bangweulu Adventure and Heritage Tourism Circuit</li> </ul>	X	X	X	140,000 technical preparation Capital costs to be determined	MoTA	<ul style="list-style-type: none"> <li>- Samfya Municipality</li> <li>- African Parks</li> <li>- Kasanka Trust</li> </ul>	<ul style="list-style-type: none"> <li>- Successfully completed initial planning and conceptual briefs and pre-feasibility studies</li> </ul>

No	Strategy	Project/Action	Phase			Cost Estimate (Phase 1) (US\$)	Responsibility		Success Indicators (Phase 1)
			1	2	3		Lead	Support	
5.1.1	Implementing Tourism Action Areas in identified TDA's (cont.)	(vii) Strengthen Siavonga as a domestic resort hub <ul style="list-style-type: none"> <li>Urban Design Strategy</li> <li>Waterfront Plaza</li> <li>Watersports Centre</li> <li>Visitor Information Programme</li> </ul>	X	X	X	160,000 technical preparation Capital costs to be determined	MoTA	- Siavonga District Municipality	- Successfully completed initial planning and conceptual briefs and pre-feasibility studies
		(viii) Strengthen and expand tourism in Nsumbu and the North <ul style="list-style-type: none"> <li>Improve Nsumbu NP</li> <li>Nsumbu Community Development Programme</li> <li>Kasaba Bay Tourism Resort</li> <li>Northern Lakes and Waterfall Tourism Circuit</li> </ul>	X	X	X	170,000 technical preparation Capital costs to be determined	MoTA	- DNPW - ZDA - Local Municipality - CRB's	- GMP approved and functional - Successfully completed initial planning and conceptual briefs, pre-feasibility studies, workshops and CDP
		(ix) Develop and package Kafue Flats tourism offer <ul style="list-style-type: none"> <li>Lochinvar NP improvement</li> <li>Kafue Flats GMA Community Programme</li> <li>The Kafue Flats Wetland Tourism Circuit</li> </ul>	X	X	X	130,000	MoTA	- Local Municipality - DNPW - CRB'S	- Successfully completed initial planning and conceptual briefs, prefeasibility studies, workshops and CDP
		(x) Improve tourism packaging and capacity in the Copperbelt and develop a Copperbelt community heritage tourism corridor <ul style="list-style-type: none"> <li>Ndola Visitor Information Programme</li> <li>The Community Heritage Corridor</li> </ul>	X	X	X	100,000	MoTA	- Ndola Municipality - Other Municipality - CRB's	- Successful completion of both the Visitor Information Programme and the Community Heritage Corridor and visitor numbers growing

No	Strategy	Project/Action	Phase			Cost Estimate (Phase 1) (US\$)	Responsibility		Success Indicators (Phase 1)
			1	2	3		Lead	Support	
		(xi) Develop and package Western KAZA tourism circuit o The Western KAZA Tourism Circuit	X	X		45,000	MoTA	- DNPW - African Parks	- Successful completion of the Western Kaza circuit and visitor numbers growing
5.1.2	<b>Developing overland touring circuits</b>	(i) Adopt a participative process in identifying and developing viable tourism circuits	X	X		80,000	MoTA	- Provincial Government - DNPW - African Parks - CRB's - Private Sector	- Process and methodology agreed and implemented for development of routes, circuits and signage agreed with display under way
5.1.3	<b>Advancing cultural and arts tourism</b>	(i) Review and adapt the concept of government-operated cultural villages	X			15,000	MoTA DAC	- Local Government - National Arts Council - Private Sector - ZTA	- Feasibility studies conducted and initial discussions with private sector concluded towards viable operations
		(ii) Identify and support a few viable community cultural tourism initiatives as success models of cultural tourism development	X	X	X	120,000	MoTA DAC	- Local Government - NGO's - Traditional Chiefs - ZTA	- 3-5 pilot cultural tourism initiatives selected and support programme operational
		(iii) Establish a community cultural and arts tourism support programme	X	X		50,000	MoTA DAC	- NGO's - ZTA - National Arts Council - DNPW	- Support programme finalised and discussions with initial candidates underway
		(iv) Improve the quality and relevance of museums in tourism areas	X	X		150,000	MoTA	- National Museums Board - Museums	- Audit completed and initial priority improvements identified and progressed

No	Strategy	Project/Action	Phase			Cost Estimate (Phase 1) (US\$)	Responsibility		Success Indicators (Phase 1)
			1	2	3		Lead	Support	
5.1.4	<b>Restocking National Parks</b>	(i) Launch a restocking programme for South Kafue	X	X		To be determined	MoTA DNPW	- African Parks - FZS	- Framework and timeframe determined for the restocking and - Restocking underway
		(ii) Lease out depleted parks and game management areas for game ranching on restock-operate-transfer basis		X		Dependent upon model chosen	MoTA DNPW	- DNPW - African Parks - FZS - Kasanka Trust	- Decision taken on the appropriate model for one park and discussions underway with an interested partner
		(iii) Further expand collaboration with international and local conservation partners	X	X	X		MoTA DNPW	- DNPW - African Parks - FZS - Kasanka Trust	- Identification of near term priority collaboration opportunities
5.2	<b>Goal 2: To provide easy and affordable tourist access</b>								
5.2.1	<b>Improving flight linkages from key international markets</b>	(i) Launch an air access support programme	X	X	X	300,000 p.a.	MoTA	- Zambia Airports - Zambia Civil Aviation Authority - ZRS - ZTA - Private Sector	- Air access support team established and operational - An agreed package of changes to airport operating charges and joint marketing initiatives is completed
		(ii) Canvass foreign and local airlines to provide international flights from Europe directly to Zambia and build airline partnerships	X	X	X	50,000	MoTA	- ZTA - Zambia Airports Corp - Zambia Civil Aviation Authority - Private sector travel trade	- Barriers to entry identified and mitigation measured introduced - One direct, non-stop flight from Europe to Lusaka operational

No	Strategy	Project/Action	Phase			Cost Estimate (Phase 1) (US\$)	Responsibility		Success Indicators (Phase 1)
			1	2	3		Lead	Support	
5.2.2	Capitalising on growth in foreign air supply in the broader region	(i) Set up Zambian immigration facilities at Victoria Falls International Airport		X	X		MoTA	- Zambia Civil Aviation Authority - Zambia Airports Corp	-
		(ii) Facilitate distribution of visitors from international air hubs to tourism growth points		X	X	Subject to negotiation with the Zimbabwe Authorities	MoTA		- Proposed Air Access Team will have agreed a programme of airline support and a facilities arrangement at Victoria Falls Airport
5.2.3	Reducing costs of domestic air travel	(i) Reduce relevant air operational charges on domestic scheduled and charter routes	X			Depending on measures introduced	MoTA	- Zambia Civil Aviation Authority - Zambia Airports Corp - ZTA	- Introduction of a significantly revised structure of airport charges
		(ii) Improve fuel supply at selected smaller airfields	X			Subject to the practical options available	MoTA	- Zambia Civil Aviation Authority - Local Government - Charter airlines	- Decision implemented to improve fuel supply at selected smaller airfields
		(iii) Strengthen communication and partnerships between authorities and air operators	X			1,000	MoTA	- Zambia Civil Aviation Authority - Zambia Airports Corporation - Private sector airlines	- Mechanism set up to communicate more effectively and in a timely manner
5.2.4	Easing immigration conditions for key markets	(i) Remove or reduce visa requirements for key tourism source markets	X			Revenue sacrifice	MoTA	- Ministry of Home Affairs - Zambia Revenue Authority	- Introduction of a revised schedule of visa requirements



No	Strategy	Project/Action	Phase			Cost Estimate (Phase 1) (US\$)	Responsibility		Success Indicators (Phase 1)
			1	2	3		Lead	Support	
5.2.4	Easing immigration conditions for key markets (cont.)	(ii) Remove or reduce tourist vehicle overland entry charges and simplify procedures		X	X	Revenue sacrifice	MoTA	- Zambia Revenue Authority - Ministry of Home Affairs	- Agreement to introduce a revised schedule of vehicle entry charges
		(iii) Improve tourist reception facilities at border posts		X	X	400,000 Subject to discussion between the parties	MoTA	- Ministry of Home Affairs	- Agreement to improve tourist reception facilities at border posts
		(iv) Instil a tourism-friendly culture at border posts	X			5,000	MoTA	- Ministry of Home Affairs	- Agreement to hold a workshop/seminar for Border Officials
5.2.5	Improving road linkages to and in key attractions	(i) Include planning, development and maintenance of roads in National Parks under the mandate of RDA	X			Capital costs subject to examination of priorities and budgets	MoTA	- DNPW - RDA	- Agreement to extend RDA's mandate to cover road network's in National Parks
		(ii) Set up a specialist 'tourist unit' in RDA		X	X	5,000 technical evaluation	MoTA	- RDA	- Agreement re the remit of such a body and for MoTA - Unit established - MoTA appoint/second a senior officer to work directly in RDA HQ
5.3	<b>Goal 3: To create a favourable business and investment climate</b>								
5.3.1	Improving land tenure and	(i) Formulate and update management plans for all conservation areas	X	X		25,000	MoTA	- DNPW	- Incomplete and outstanding GMPs are all finalised

No	Strategy	Project/Action	Phase			Cost Estimate (Phase 1) (US\$)	Responsibility		Success Indicators (Phase 1)
			1	2	3		Lead	Support	
	encouraging investment in tourism priority zones	(ii) Promulgate and implement a transparent and consistent concessions policy for nature tourism areas	X			15,000	MoTA	- DNPW - Ministry of Lands	- A transparent and consistent concessions policy is drawn up and implemented
		(iii) Provide VAT relief for products required to activate priority Tourism Development Areas	X	X		Revenue sacrifice Will vary dependent upon size of the tourism sector in the TDA	MoTA	- Zambia Revenue Authority	- VAT relief programme in selected TDA's for a limited time period agreed with ZRA and implemented
		(iv) Exempt MICE delegates to Lusaka from paying VAT		X	X	Revenue sacrifice	MoTA	- Zambia Revenue Authority	- Major growth in the MICE market and international delegate numbers
		(v) Remove VAT and important duties on dedicated tourism vehicles and equipment		X	X	Revenue sacrifice	MoTA	- Zambia Revenue Authority	- Sufficient growth in importation/ registration of safari vehicles to meet Master Plan targets
5.3.2	Reducing investor cost and bureaucracy of doing business	(i) Improve public-private liaison regarding tourism development constraints and ensure implementation and follow through of decisions	X	X	X	\$3,000	MoTA	- TCZ - ZTA - Other private sector groupings	- Tourism Sector Working Group set up and working -proceedings can be read/ followed on their website
		(ii) Engage the local financial sector to foster an improved understanding of tourism financing opportunities		X	X	-	MoTA	- Banking sector - TCZ - ZDA - ZTA - Tourism Working	- Viable financing arrangements for tourism agreed and commenced

No	Strategy	Project/Action	Phase			Cost Estimate (Phase 1) (US\$)	Responsibility		Success Indicators (Phase 1)
			1	2	3		Lead	Support	
								Group	
		(iii) Improve tourism functionality at 'one-stop-shop' business centres	X			-	MoTA	- TCA - ZTA - Tourism Working Group	- Growth in numbers of users and satisfied customers as functionality improves
		(iv) Reduce the number of licenses required from tourism businesses and simplify the licensing process	X	X		-	MoTA	- ZTA - TCZ - Central and Local Government Departments	- Significant number of license requirements dropped or merged with other allied measures
5.3.3	<b>Improving law enforcement and protection of wildlife and other natural and cultural resources in parks and protected areas</b>	(i) Increase DNPW financing and capacity for nature law enforcement and especially anti-poaching	X	X	X	\$2 mn p.a.	MoTA	- DNPW	- Additional law enforcement capacity employed - Additional training and skills transfer programmes introduced
		(ii) Further strengthen public-private partnerships in conservation and law enforcement	X	X	X	Joint financing partner-ships	MoTA	- DNPW - NGO's	- Increased number of successful partnership arrangements between DNPW, NGO's and conservation organisations to help strengthen DNPW capacity and operations.
5.3.4	<b>Improving community benefits from</b>	(i) Implement suitable mechanisms to ensure communities get a share of non-consumptive tourism revenues	X			5,000	MoTA	- DNPW - CRB's	- Appropriate user fee introduced from all tourism operators in the

No	Strategy	Project/Action	Phase			Cost Estimate (Phase 1) (US\$)	Responsibility		Success Indicators (Phase 1)
			1	2	3		Lead	Support	
	<b>non-consumptive tourism</b>	e.g. Land user charges, Share of gate revenues, Tourist contribution fee							GMA's – Share of NP gate revenues to CRBs or – Nightly community development fee introduced
		(ii) Use the Tourism Development Fund as distribution mechanism for community fees	X	X	X	-	MoTA	- CRB's	– Improved CRB cash flow, scouts paid on time and fewer delays and frustrations at community level
		(iii) Improve auditing and governance of CRB funds	X	X	X	5,000 support funding	MoTA	- CRB's - Tourism Development Fund	– Clean audits of all CRBs – Increased timeliness and objectivity in auditing CRB accounts
		(iv) Plan all GMA's to separate hunting and photographic tourism		X	X		MoTA	- DNPW	– GMAS zoned and enforced separating different activities
5.3.5	<b>Upgrading quality standards</b>	(i) Implement a relevant and practical classification and grading system	X	X		300,000	MoTA	- ZTA - Zambia Bureau of Standards	– Grading and classification successful introduced at 80% of conforming business – High levels of customer satisfaction
		(ii) Develop a register of professional skills providers for qualitative advice to first time tourism sector investors		X	X	-	MoTA	- Tourism Working Group	– Register started and growing
		(iii) Improve medical provision and emergency services for tourism		X	X	To be determined	Min Health	- MoTA - DNPW - African Parks	– Current medical providers agree coordinated approach to tourism

No	Strategy	Project/Action	Phase			Cost Estimate (Phase 1) (US\$)	Responsibility		Success Indicators (Phase 1)
			1	2	3		Lead	Support	
								- FZS - Lodge operators - Provincial hospitals	emergencies
5.3.6	Developing tourism human resources	(i) Increase the extent of skills training supply		X	X	5,000	MoTA	- TEVETA - HCAZ - TCZ - Regional training bodies	- Growth in the number of accredited training courses available regionally
		(ii) Ensure that tourism training supply and content matches industry needs	X	X		-	MoTA	- Private employers - Training bodies	- The number of changes and improvements made to curricula and teaching practice
		(iii) Improve the quality of tourism skills training facilities, staff and curricula	X	X		\$1.5 mn p.a.	MoTA	- ZITHS	- At least one functional training centre of excellence for tourism - Programme initiated to improve quality of tourism skills, training facilities staff and curricula in all establishments
5.3.6	Developing tourism human resources (cont.)	(iv) Improve skills and service levels in the workplace	X	X		40,000	MoTA	- ZITHS	- Appropriate programmes implemented
		(v) Encourage entry of skilled workers from elsewhere in certain specialised areas		X	X	-	MoTA	- HCAZ - TCZ	- Identify the skills needed from outside Zambia - Suitable immigration arrangements introduced to facilitate entry

No	Strategy	Project/Action	Phase			Cost Estimate (Phase 1) (US\$)	Responsibility		Success Indicators (Phase 1)
			1	2	3		Lead	Support	
		(vi) Improve tourism awareness, understanding and skills at school level		X	X	15,000	MoTA	- Dept. Education TEVETA - Department of Standards and Curricula for General Education	- Suitable increase in tourism and hospitality programmes in vocational schools - Tourism awareness programme introduced in at least 50 schools nationally
<b>5.4</b>	<b>Goal 4: To raise demand for destination Zambia</b>								
<b>5.4.1</b>	<b>Evolving and strengthening Zambia's tourism brand proposition</b>	(i) Strengthen the brand proposition and slogan	X			40,000	ZTA	- MoTA - National Planning Office - TCZ - Local and provincial stakeholders	- More than 80% of Zambian industry supports and carries the brand - High brand recognition among trade and consumers in core markets
		(ii) Refresh the brand identity and imagery	X			15,000	ZTA	- MoTA - National Planning Office	- Destination logo favourably rated by 80% of local and foreign travel trade
<b>5.4.1</b>	<b>Evolving and strengthening Zambia's tourism brand proposition (cont.)</b>	(iii) Form a tourism communication work group		X	X	1,000	ZTA	- MoTA - Presidency - ZDA - Foreign Affairs	- Clear communication protocol among all government Ministries to promote Zambia
		(iv) Formulate and implement a tourism crisis communication plan		X	X	2,000	ZTA	- MoTA - Police Services - Foreign Affairs	- Clear plan of action and communication lines agreed among stakeholders in case of crisis or emergency

No	Strategy	Project/Action	Phase			Cost Estimate (Phase 1) (US\$)	Responsibility		Success Indicators (Phase 1)
			1	2	3		Lead	Support	
		(v) Form a local national-provincial-local marketing partnership forum		X		1,000	ZTA	- Provincial governments - District governments - Provincial offices - Local tourism associations	- Provincial and local government and private sector stakeholders participate in planning and executing Zambia marketing programmes
		(vi) Agree a protocol for joint branding and marketing	X			-	ZTA	- MoTA - Foreign Affairs - ZCT - Local associations - Local government	- All relevant public and private agencies that promote Zambia agree on a protocol for applying the tourism destination brand
5.4.2	Focusing international marketing in high-potential source markets	(i) Develop a 3-year promotion plan for target international source markets	X			-	ZTA	- ZCT - Local tourism associations - Key operators	- Plan with target markets, actions, expenditure etc., signed off by board
		(ii) Create a realistic balance between domestic and international marketing	X			-	ZTA	- Local government - Dept. Arts and Culture - Local tourism associations	- 70% of resources for international marketing, 30% domestic marketing
5.4.3	Strengthening and expanding ZTA's marketing capacity	(i) Significantly increase ZTA's marketing budget, through a special budget allocation	X	X		Minimum \$5 mn p.a. (to fund activities listed here)	Treasury	- MoTA - ZTA	- Formula agreed and implemented for increasing ZTA budget in accordance with strategy - Budget allocation fixed for rolling 3-year periods

No	Strategy	Project/Action	Phase			Cost Estimate (Phase 1) (US\$)	Responsibility		Success Indicators (Phase 1)
			1	2	3		Lead	Support	
		(ii) Prioritise marketing for funding allocation from the Tourism Development Fund	X	X	X	-	TDF	- ZTA - MoTA - TCZ	- Detailed programme of funding allocations agreed, published and implemented
		(iii) Appoint specialised destination marketing representatives in key international markets	X	X		400,000 p.a.	ZTA	- TCZ	- Marketing representative appointed RSA, UK, USA - Performance agreed and tracked in line with growth targets
		(iv) Establish a dedicated MICE unit	X	X	X	120,000 p.a.	ZTA	- Mulungushi Conference Centre - Private conference venues	- Dedicated MICE unit set up in ZTA and operational with appropriate budget
		(v) Strengthen online marketing	X	X	X	100,000 p.a.	ZTA	- ZCT - Local tourism associations	- Online marketing unit strengthened with specialists - Online integration and cooperation with private sector associations
5.4.4	Launching multi-year promotion campaign	(i) Devise campaign imagery and collateral	X			Incl. in campaign	ZTA	- Outsource	- Campaign planned, identity designed, funding secured
		(ii) Build partnerships and alignment with marketing campaign	X			Incl. in campaign	ZTA	- ZCT - Local tourism associations - International tour operator partners	- All key tourism operators on board and participating
		(iii) Coordinate all marketing activities in support of a campaign roll-out	X			Campaign cost \$3.5 million per	ZTA	- Campaign partners	- Campaign manager appointed and all activities aligned behind



No	Strategy	Project/Action	Phase			Cost Estimate (Phase 1) (US\$)	Responsibility		Success Indicators (Phase 1)
			1	2	3		Lead	Support	
		programme				annum			campaign
		(iv) Launch a dedicated domestic advertising campaign during the slower season	X			Incl. in campaign	ZTA	- ZBC - Local tourism associations - DNPW - NHCC - Private sector	- Above-the-line advertising campaign on radio, TV, online, etc.  - Significant bookings for campaign special offers
5.4.5	Strengthening travel trade marketing	(i) Exhibit at selected Trade Fairs	X			Incl. in campaign	ZTA	- Private sector partners	- Representative Zambia stands at: RSA: Either Indaba or WTM Africa London: WTM Europe: ITB China: Suitable trade fair
		(ii) Ensure regular communication with the travel trade	X			Incl. in campaign	ZTA	- Private sector partners	- At least 3 travel trade information and planning meetings and 6 trade newsletters sent per annum
		(iii) Invest in suitable Joint Marketing Agreements in core markets	X			Incl. in campaign	ZTA	- International tour operators/OTAs	- At least one new JMA concluded per annum
5.4.5	Strengthening travel trade marketing (cont.)	(iv) Build capacity of inbound Zambian operators		X		Incl. in campaign	ZTA	- Zambian inbound tour operators and agents	- At least one educational travel academy per annum for local travel trade
		(v) Conduct sales missions and workshops in Core markets	X	X	X	Incl. in campaign	ZTA	- Private sector partners - Foreign missions	- ZTA coordinated sales road shows in at least 2 markets

No	Strategy	Project/Action	Phase			Cost Estimate (Phase 1) (US\$)	Responsibility		Success Indicators (Phase 1)
			1	2	3		Lead	Support	
		(vi) Arrange trade familiarisation visits for Core and Invest markets	X	X	X	Incl. in campaign	ZTA	- Private sector partners - Foreign missions	- At least 50 credible travel agents and operators from core and invest markets hosted p.a.
		(vii) Launch ‘Secrets of the Zambezi’ agent affiliation programme		X	X	30,000	ZTA	- Foreign travel agencies	- At least 50 agents per year signed up for programme
5.4.6	<b>Leveraging travel media exposure and public relations</b>	(i) Produce and publish a press kit	X			-	ZTA	- Local and foreign media	- Press kit developed, distributed and available on website
		(ii) Publish and promote celebrity stories		X	X	Incl. in campaign	ZTA	- Local and foreign media	- At least one celebrity story blogged and carried per year
		(iii) Strengthen media relations	X	X	X	Incl. in campaign	ZTA	- Local and foreign media	- Media database populated - Local media engaged at least twice per annum
		(iv) Arrange travel press trips	X	X	X	Incl. in campaign	ZTA	- Local and foreign media	- At least 20 travel journalists hosted p.a.
		(v) Track and measure media value		X		Incl. in campaign	ZTA	- Media tracking service - Foreign missions	- Media coverage value at least K30 for K1 spent
5.4.7	<b>Repositioning ZATEX</b>	(i) Strengthen logistics of ZATEX	X	X		200,000	ZTA	- Partly outsource to specialist	- Core logistics outsourced - At least 80% of exhibitors give “satisfied” rating
		(ii) Upscale the domestic consumer component of Zatex	X	X		-	ZTA	- Zambian media - Private sector	- Substantial increase in public attendance and packages booked

No	Strategy	Project/Action	Phase			Cost Estimate (Phase 1) (US\$)	Responsibility		Success Indicators (Phase 1)
			1	2	3		Lead	Support	
		(iii) Focus on engaging and attracting the regional travel trade as buyers	X	X		-	ZTA	- Regional travel trade - RETOSA	- 80% of travel buyers from region - All buyers credible members of recognised private associations in their countries
5.4.8	Strengthening the MICE sector	(i) Develop and implement a dedicated MICE marketing plan	X	X	X	400,000 p.a.	ZTA	- Mulungushi Conference Centre - Private conference hotels	- Conference tourism grows at least 15% p.a.
		(ii) Improve facility standards in the MICE sector	X	X		130,000 technical preparation Capital costs to be determined	ZTA	- Mulungushi Conference Centre - Private conference hotels	- Mulungushi centre upgraded to international quality conference venue and hotel complex
		(iii) Identify and support a portfolio of three to five flagship 'Zambia Great Events'		X	X	80,000 p.a.	ZTA	- Local tourism associations - Event organisers	-
5.4.9	Prioritising online marketing tools and promotion	(i) Improve the official ZTA website	X			10,000	ZTA	- Outsourced service provider	- Major increase in website users - Travel trade supports and lists products on website
		(ii) Populate, maintain and promote a range of social media accounts	X	X	X	2,000 p.a.	ZTA	- Private sector partners	- Major increase in Facebook and Instagram following
		(iii) Engage in a content drive and partnerships	X	X	X	1,000 p.a.	ZTA	- Private sector partners - Local tourism associations	- Various local content providers signed up

No	Strategy	Project/Action	Phase			Cost Estimate (Phase 1) (US\$)	Responsibility		Success Indicators (Phase 1)
			1	2	3		Lead	Support	
		(iv) Launch special digital marketing campaigns in support of the overall promotion campaign	X			120,000 p.a.	ZTA	- Private sector partners - Local tourism associations	- Programme of online advertising implemented and results tracked - Engagement targets met
		(v) Leverage online affiliates		X	X	40,000 p.a.	ZTA	- OTA's such as Expedia, Tripadvisor, Booking.com, etc.	- Active joint marketing programmes with international OTAs
		(vi) Further expand an extensive database and procure a suitable Customer Relationship (CRM) technology	X	X	X	2,000	ZTA	- Private products for listings on database	- At least 80% of products and attractions correctly captured and maintained
		(vii) Conduct effective email marketing	X			2,000	ZTA	- Private products as newsletter subscribers	- 6 email communications p.a.
5.4.10	Expanding visitor information services	(i) Improve the visitor information office network at entry points		X	X	30,000 p.a.	ZTA	-	- Visitor information points at major tourism sites and airports
		(ii) Expand local online visitor information services	X	X		5,000	ZTA		- Free Wi-Fi at key tourism sites, starting with Livingstone
<b>Goal 5: To strengthen the management of the sector</b>									
5.5.1	Elevating the status of tourism as a national priority	(i) Establish a presidential tourism council	X	X	X	5,000 p.a.	Presidency	- MoTA - National Planning - Transport - Higher Education	- Key aspects of tourism strategy instructed for implementation - Consistent agenda followed and obstacles to tourism growth

No	Strategy	Project/Action	Phase			Cost Estimate (Phase 1) (US\$)	Responsibility		Success Indicators (Phase 1)
			1	2	3		Lead	Support	
								- Finance	unblocked
		(ii) Establish a public-private Tourism Liaison Committee (TLC)	X	X	X	5,000	MoTA	- ZTA - TCZ - Individual stakeholders with international expertise	- At least 4 meetings p.a. - Agree and measure performance metrics for tourism sector success - Annual tourism action plans agreed
5.5.2	Ensure effective implementation and monitoring of plans	(i) Establish a project management unit (PMU) within MoTA, reporting directly to the PS	X	X	X	Salary cost	MoTA	- The various departments and agencies in MoTA - The provincial and local authorities and other institutions	- Master Plan serves as basis for tourism programme - Database of all projects compiled - Project progress strictly monitored and programmes adapted as required
		(ii) Establish a technical assistance programme (TAP) within the PMU	X	X	X	20,000	MoTA	- Public agencies and private sector at provincial level - Local level bodies and communities - Private sector bodies and associations	- Full programme of technical assistance to advise provincial and local government bodies and associations
5.5.3	Streamlining and strengthening	(i) Conduct an audit of staff capacity and strengthen tourism related skills in the Ministry	X			-	MoTA	- The various departments and agencies in MoTA	- Gaps in MoTA capacity addressed, structured accordingly

No	Strategy	Project/Action	Phase			Cost Estimate (Phase 1) (US\$)	Responsibility		Success Indicators (Phase 1)
			1	2	3		Lead	Support	
	public sector tourism capacity	(ii) Review roles of the Department of Tourism and ZTA		X	X	-	MoTA	- The PS and senior level management	- The successful reversion of regulatory enforcement from ZTA to the Department of Tourism
		(iii) Strengthen and structure ZTA to fulfil its mandate	X			Salary cost	MoTA	- The PS and senior level management	- Successful implementing of the grading and classification system - Adequate capacity and progress in implementing master plan
		(iv) Investigate, streamline and align culture and heritage management capacity		X		To be determined	MoTA	- Department of Arts and Culture - NHCC - NMB - NAC	- Successful alignment of content, staff capacity and resources - Sustainable model for managing cultural villages implemented
		(v) Establish a specialist tourism function in DPNW	X			20,000 p.a. plus salary expense	MoTA	- DNPW	- Successful operation of the specialist tourism unit in DNPW
		(vi) Strengthen provincial and local government tourism capacity and resources	X	X		Provincial funding	MoTA	- Provincial and district councils	- Provincial and local governments in TDA's have specific tourism plans agreed and funded in support of Master Plan
		(vii) Audit and if necessary restructure the Hostels Board of Management	X			50,000 technical feasibility	MoTA	- The PS and senior level management	- HBM restructured in accordance with study findings
		(viii) Create strong, viable local tourism partnerships	X			40,000 p.a. support fund for local associations	MoTA	- Local government bodies, private operators and communities	- Several strong, viable Local Tourism Associations created

No	Strategy	Project/Action	Phase			Cost Estimate (Phase 1) (US\$)	Responsibility		Success Indicators (Phase 1)
			1	2	3		Lead	Support	
5.5.4	Improving the quality and reliability of tourism statistics and research	(i) Conduct a thorough assessment and improvement plan of the procedures, processes and technicalities of producing domestic and international visitor arrivals data	X			35,000	MoTA	- Central Statistics Office (CSO) - Ministry of Home Affairs - Bank of Zambia - ZTA	- Production of more comprehensive, accurate, reliable and timely annual statistics
		(ii) Form multi-party tourism statistics workgroup	X			1,000	MoTA	- CSO - Home Affairs - ZTA - Bank of Zambia - Private Sector	- Working group, set up, its organisation and agenda agreed and functioning
		(iii) Conduct high quality visitor research	X	X	X	200,000	MoTA	- CSO - Home Affairs - Bank of Zambia	- Annual visitor survey conducted
		(iv) Eliminate bureaucracy and duplication in statistics collection		X	X		MoTA	- CSO - ZTA	- Duplication of statistics collection eliminated
		(v) Improve skills capacity in tourism statistics and handling	X	X		43,000	MoTA	- CSO - Home Affairs - Bank of Zambia - Private Sector	- Production of more comprehensive, accurate, reliable and timely annual statistics
5.5.5	Improving funding for implementing the tourism strategy	(i) Significantly increase Government budget allocation for tourism	X	X	X	As per this plan	Treasury	- MoTA - ZTA	- Tourism budget significantly increased through special funding allocation
		(ii) Replace the bed levy with a departure tax on air tickets	X	X	X	5,000	MoTA	- Civil Aviation Authority - Zambia Revenue Authority - Airline	- Successful introduction and operation of the departure tax

No	Strategy	Project/Action	Phase			Cost Estimate (Phase 1) (US\$)	Responsibility		Success Indicators (Phase 1)
			1	2	3		Lead	Support	
								companies	



## Annexure A: Detailed projections for Visionary Growth Scenario

Visionary Growth Scenario for International Arrivals 2018 – 2038 (000's)

Market Segment	2018	2019	2020	2021	2022	2023	2024	2025	2026
Leisure	120	139	159	180	206	237	276	324	377
MICE	24	26	30	34	38	42	48	55	64
Business	527	537	545	554	571	588	611	636	661
VFR	58	60	61	62	63	65	68	71	73
Other	256	257	260	263	271	280	291	302	315
<b>TOTAL</b>	<b>985</b>	<b>1019</b>	<b>1055</b>	<b>1093</b>	<b>1149</b>	<b>1212</b>	<b>1294</b>	<b>1388</b>	<b>1490</b>

*Source: Consultants Estimates*

Market Segment	2027	2028	2029	2030	2031	2032	2033	2034	2035
Leisure	421	463	497	531	565	599	633	667	701
MICE	71	75	81	86	92	97	103	108	114
Business	688	715	744	773	804	836	870	905	941
VFR	76	79	82	86	89	93	97	101	104
Other	327	341	354	368	383	398	414	430	448
<b>TOTAL</b>	<b>1583</b>	<b>1673</b>	<b>1758</b>	<b>1844</b>	<b>1933</b>	<b>2023</b>	<b>2117</b>	<b>2211</b>	<b>2308</b>

*Source: Consultants Estimates*

Market Segment	2036	2037	2038
Leisure	735	769	803
MICE	119	125	131
Business	979	1018	1058
VFR	108	113	118
Other	466	484	504
<b>TOTAL</b>	<b>2407</b>	<b>2509</b>	<b>2614</b>

*Source: Consultants Estimates*

## **Annexure B: Sustainable tourism development guidelines**

The following Guidelines support the development of TAAs and act as a checklist for planners, developers, operators and resource managers in the promotion of a quality sustainable tourism product.

They are divided into three core sections:

1. Sustainable site development planning, including:
  - The development process
  - Environmental design considerations
  - Operations and management
2. Community action planning, including:
  - Setting the stage
  - Community action planning steps
  - Communications
3. Urban design
  - The public realm
  - Key elements of urban design
  - Spaces
  - Street furniture and paving
  - New developments
  - Lighting up tourism areas

### **B1: Sustainable site development planning**

#### **B1.1 The development process**

The following provides a guide to the planning and development process and relevant issues for developers and Government at each stage. The emphasis is not on a prescribed solution for each site or redevelopment scheme, but on a process through site and market analysis, conceptual planning, implementation and management to achieve a quality and sustainable development project.

The process may be described in terms of:

- Physical analysis;
- Market analysis;
- Site planning;
- Architecture;
- Landscape design; and
- Details and management.

Developers wishing to upgrade, re-position or develop new tourism projects in Sri Lanka, must acknowledge this process.

#### **1. Physical Analysis**

The prominence given to proper site analysis acknowledges the importance of environmental awareness and responsiveness. Site analysis should include investigation of, and response to, a broad range of environmental factors and issues including:

**Context:**

Recognition of the site's surrounding, provides the opportunity for the creation of a unique and sympathetic project which is central to a successful tourism development. Questions of environmental setting, views, scale of adjacent and nearby buildings, all need careful attention. For example, the development is likely to be more successful if it can retain a sense of identity with the area and that the development does not contribute towards local conflicts, or place extra burdens on the community.

**Density:**

Siting of facilities should carefully weigh the relative merits of concentration versus dispersal. Natural landscape values may be easier to maintain if facilities are carefully dispersed. On the other hand, concentration of structures leaves more undisturbed natural areas.

**Climate:**

The characteristics of the Zambian climate should be considered when locating facilities so that human comfort can be maximised while protecting the facility from climatic forces such as heat and rain.

**Slopes:**

Building on slopes considered too steep can lead to soil erosion, loss of hillside vegetation and damage to fragile wetland and marine systems.

**2. Market Research**

Tourism developments require sound business planning to sustainably manage the environment, satisfy market needs and generate long term profits. Careful planning and appropriate market research will help translate a redevelopment of an existing facility or new tourism development into a well-designed, market oriented and financially feasible project. Successful developments for example, are those that provide what the market wants. Market forces are the central backbone to commercially successful tourism projects and therefore it is crucial that the planning process involves the market feasibility of projects from the outset. Issues include:

**Market audit:**

An initial evaluation of the potential of the destination in terms of visitor numbers, seasonality, length of stay, spending levels and airlift (seats on planes) to support the proposed project.

**Market forecasts:**

Surveys should be undertaken for both short and long term visitor forecasts to include potential volumes by geographic area and demographic characteristics. These forecasts should take into account marketing activity, both current and proposed, socio-economic conditions, trends in travel, destination preferences and style of facility.

**Competitive analysis:**

This will indicate the size, positioning and phasing that would be most appropriate. Analysis, taking into account both local and foreign competition should be undertaken on such project features as location, facilities, quality/positioning, pricing policies, linkages, occupancy levels and revenues and existing and future capacity.

**Consumer needs:**

Visitor forecasts, guest mix, activity preferences and trends in facility expectation provide a benchmark for market match analysis.

**Finance/Investment:**

Only those projects that are perceived as being potentially viable financially and meet market needs will have a chance to successfully secure investment funds for development.

**Concept review:**

Market and economic analysis is undertaken at both the pre-feasibility and full-feasibility. These

evaluations will typically suggest modifications to design and concept to improve viability. The differing requirements of developer, operator, funder and owner will all influence design and concept during the development programme.

### **3. Site Planning**

This can be broadly described as the conceptual, design and image creating stage of the project building upon the physical and market analysis. Planning issues include:

#### **Zoning:**

The distribution and relationship of amenities and facilities across the site, and in relation to one another. They should be organized to maximise the potential of the site's environment and designed to present a unified, cohesive appearance. This can be achieved by separating the overall development into smaller elements and using landscaping to link buildings and provide a consistent theme or image.

#### **Circulation:**

The development of a coordinated circulation system for cars and pedestrians is crucial. The layout should try to achieve a balance between efficiency (setting out, infrastructure) and the desire to create an attractive place. For example, long straight runs of buildings are most efficient in terms of infrastructure, but give a monotonous and unattractive environment, whereas clusters create protected environments and form coherent spaces.

#### **Activity centres and recreational facilities:**

These areas can be used to develop focal points of activity within the development. The links between these areas often become the underlying structure of the master plan. However, siting facilities, paths and roads to direct use away from sensitive areas such as critical habitats, is important. No development should occur in a manner which would restrict public access to the coast, waterways or other public facilities.

#### **Parking:**

This should be designed to minimise the impact of cars, taxis, buses and service vehicles, both within the project and generally hidden from amenity areas.

#### **Open space and landscaping:**

Open space should be used as a form of value creation rather than treated as left over space. Landscaping should be used to reinforce and enhance the development character - for example, it should be remembered that in a tourism project, paying guests are buying an environment rather than a collection of buildings. The use of naturalised plants should be used where possible.

#### **Services:**

Safety, visual quality, noise, and odour are all factors that need to be considered when siting support services and facilities. These areas need to be separated from public use and circulation areas. In certain circumstances, utilities, energy systems and waste recycling areas can be a positive part of the visitor experience.

#### **Building density, type and layout:**

Development should be constructed to a scale and character that is sensitive and appropriate to the site's characteristics and embraces the existing landscape. This decision making process must be integrated within the density provisions in the development briefs, together with marketing and financial analysis.

#### **Phasing:**

Each project will probably involve a phased construction.

### **4. Architecture/Themes**

The site analysis and conceptual master planning process will not prescribe architectural style but aspects of the analysis should cue various architectural decisions:

**Image:**

This should evolve in the planning stage as a consequence of the physical and market analysis. Each site is unique and hence should name its own characteristic image.

**Materials:**

These should reflect the development image, visual context, the site's setting and degree of harmony, or contrast, being sought. Where possible, local materials and local labour should be used.

**Interior:**

In any tourism facility, and especially in tropical areas, the interiors should be considered carefully. Major internal spaces are the heart of a complex, being the areas through which all people move. The treatment of such spaces should reflect a project's unique quality.

**Sympathy and consistency of detail:**

The design should evolve from careful study of the site and its surroundings, and once in place, the intent should be visible and consistent, extending from broad concepts to the choice of motifs.

**Energy and water conservation:**

The emerging and developing principles of 'energy conservation', including the use of solar panels should be incorporated in all new developments. Buildings should be designed to include natural and cross flow ventilation features as well as incorporating cost effective energy and water conservation devices such as passive solar design elements, solar hot water systems, dual flushing toilet cisterns, low flow shower roses and rainwater tanks (see point 6 – Operations and Management).

## 5. Landscape Design

One of the strongest marketing features for tourism development is the quality of their environment. Successful developments carefully blend landscaping and architecture to achieve a consistent, unified and unique project character. Considerations for tourism developments in particular, include:

**Thematic design:**

Should be related to the planning and architectural elements of the facility. For example, the use of boulders, rock outcrops and local trees can provide both a sense of enclosure and integration with the existing landscape while lush courtyards can help extend interior spaces outward.

**Open space:**

Each tourism development requires some form of appropriate open space which should be dedicated for the use and enjoyment of all visitors. These should ideally be designed around existing vegetation and landforms. Even the smallest planting pockets, if well designed, can offer elements of form, texture, shadows, fragrances and colour.

**Planting:**

Besides the above elements, vegetation can be used for shelter. The cost of running air conditioning can be reduced by using vegetation to shield roofs and walls from direct sunlight. Planting can also be used to screen substations and garbage bins; as a barrier to prevent people straying; to stop soil erosion and stabilize slopes; and as a space definer. The use of naturalised plant species can also reduce water usage.

**Hard landscape:**

The selection of material depends on the purpose. The use of materials also helps to define changes of use (vehicles/pedestrians), level, ownership and approaches to focal points. Attention should be given to colour, pattern, noise, sunlight, heat and maintenance.

**Water features:**

The appropriate use of water, its sight and sound, can enrich the enjoyments of the environment and tourism facility immensely.

## 6. Details and Management

The overall quality of any development depends upon all aspects being sympathetically designed within an overall approach. For example, ill-considered detail can impact unfavourably upon the overall impression of a project. Elements requiring particular attention for tourism projects include:

### **Signs and information panels:**

Signage should not dominate or block views and is more effective if a simple, easy to read design is used and the chosen materials and colours blend in with the natural setting.

### **Materials and street furniture:**

High quality materials and furniture, road, footpath and hard open space surfaces, shade structures, fencing, walls, lighting, bollards, rails and the like, can make an immense difference to the quality of development. The materials and architectural form can help integrate them with their environment. Also lighting should be chosen to emphasise moods, themes and create a relaxed atmosphere.

### **Maintenance:**

A realistic maintenance programme is crucial in the continuing promotion and success of a project's image. It must be remembered that even the best designed developments can be seriously compromised by poor maintenance.

## **B1.2 Environmental design considerations**

### **1. Site Adaptive Design**

Of greatest help in achieving sustainable site design is to realise that much can be learned from nature. When nature is incorporated into designs, spaces can be more comfortable, interesting and efficient. It is important to understand natural systems and the way they interrelate in order to work within these constraints with the least amount of environmental impact.

Development should therefore reflect the unique natural attributes of the site and not depend on the importation of artificial environments. The following considerations have been specifically devised for tourism facilities.

#### **Wind:**

The major advantage of wind in tourism developments is its cooling aspect. For example, many of the structures and outdoor gathering places should be orientated to take advantage of this cooling wind movement, or 'natural' air conditioning.

#### **Geology and soils:**

Designing with geological features such as rock outcrops can enhance the sense of place. For example, integrating rocks into the design of a timber deck or boardwalk brings the visitor in direct contact with the resource and the uniqueness of a place. Soil disturbances should be kept to a minimum to avoid erosion.

#### **Water ecosystems:**

Development near water areas must be based on an extensive understanding of sensitive resources and processes. In most cases, development should be set back from the water and protective measures taken to address indirect environmental impacts. Particularly sensitive habitats such as wetlands should be identified and protected from any disturbance.

#### **Vegetation:**

Exotic plant materials, while possibly interesting and beautiful, are not amenable to maintaining healthy native ecosystems. Sensitive native plant species need to be identified and protected. Existing vegetation should be maintained to encourage biodiversity. Native planting should be incorporated into all new developments on a 2:1 ratio if any native plants are removed. Vegetation can enhance privacy, create 'natural rooms' and provide a primary source of shade. Plants also contribute to the visual integrity or natural fit of a new development in a natural setting.

**Wildlife:**

Sensitive habitat areas should always be avoided. Encouraging wildlife to remain close to human activity centres enhances the visitor experience. This can be achieved by maintaining as much original habitat as possible. Creating artificial habitats or feeding wildlife could have disruptive effects on the natural ecosystem and should normally be avoided.

**Visual character:**

Natural vistas should be used in design whenever possible. Creating on site visual intrusions (road cuts, utilities etc.) should be avoided and views of off-site intrusions carefully controlled. A natural look can be maintained by using native building material, hiding structures within the vegetation and working with the topography. It is easier to minimise the building footprint initially than it is to heal a visual scar at the end of construction.

**Archaeology:**

A complete archaeological survey prior to development is imperative to preserving resources. Once resources are located, they can be incorporated into designs as an educational or interpretative tool. If discovered during construction activities, work should be stopped and the site re-evaluated.

**History:**

Cultural traditions should be reinforced through design by investigating and then interpreting vernacular design vocabulary. Local design elements and architectural character should be analysed and employed to establish an architectural theme for new development.

**Cultural context:**

Cultural traditions should be encouraged and nurtured. A forum should be provided for local foods, music, art and crafts, lifestyles, dress and architecture; to supplement local incomes (if applicable).

**2. Utilities and Infrastructure**

With the development of a site comes the need for some level of utility services. More elaborate developments have more extensive services to provide water, waste treatment and energy for lighting, cooling, ventilation etc. The provision of these services and the effects associated with them may create adverse impacts on the landscape and the functioning of the natural ecosystem.

Early in the planning process utility services must be identified that will not adversely affect the environment and visual setting and will work within established natural systems.

**Water Supply:**

An adequate and reliable supply of drinking water must be provided to meet all the requirements for domestic and tourism developments. Designers should adopt methods to reduce consumption including: low water use toilets and low flow shower heads; use the most efficient irrigation methods; use of efficient hydraulic designs and pumps, collection of rainwater to supplement supply; and use of groundwater only in quantities that can be replenished. For larger scale tourism developments, re-circulation of treated sewage will become a vital part of their water conservation programme.

**Water distribution:**

Most distribution systems are either buried or placed at grade. At grade distribution systems have minimal effect on the site and vegetation during construction, but are subject to problems with accidental breakage, exposure, and visual quality. Burying has the advantage of protecting against accidental breakage, but leaks are more difficult to locate.

**Sewage treatment:**

Where no connection to the main sewerage system exists, developers will need to install special treatment facilities. Types of sewage treatment include: activated sludge process; sedimentation and aeration process; or septic tanks. For small facilities, a properly designed and located septic tank and soak away

system should be satisfactory.

**Outfalls:**

Waste water from coastal tourism facilities can severely damage the marine environment by excess nutrients added to the water, for example from sewage or through irrigation with poor quality grey water. The treatment of waste water and siting of outfalls must be carefully considered.

**Power:**

Distribution of electricity within a tourism site should preferably be constructed underground to avoid the unsightly appearance of poles and cables. Where this is not feasible, the planning and location of the overhead lines must take account of the visual amenity value of the landscape. Lines must be integrated into the landscape and the contours so that they cannot be seen against the skyline or diverted away from areas of high scenic attraction. Sub stations should be located away from the facility and screened from view.

### **3. Construction Methods and Materials**

The methods and techniques used for tourism development should ensure that there will be no residual signs of construction or environmental damage. Methods to minimise the impacts of construction activities upon the environment are as follows:

- Establish guidelines or controls for contractors to comply with while on site, specifying appropriate construction procedures and practices.
- Provide a briefing or training session for all contractors and their employees to specify the desired environmental management practices and to inform them of the results of non-compliance.
- Collect performance bond or deposit from contractors, which can be used to repair any undue potential environmental degradation that may occur as a result of their activities.
- Establish settling ponds or rubbish traps to prevent the discharge of pollutants and sediments into surrounding areas (especially in the lakeshore zone).
- Devise procedures to deal with waste which is generated on site, with an emphasis upon the reuse or recycling of waste where possible.
- Support local businesses and the local community by obtaining labour, building materials and other necessary resources from local suppliers and contractors.

### **4. Construction Programme**

This programme serves as a primer for developers, construction contractors and maintenance workers. The programme should cover materials, methods, testing and options. Careful organisation and phasing of construction is emphasised.

Throughout construction, the natural resource should be monitored to ensure that the environment is not being adversely affected.

### **5. Landscape Preservation/Restoration**

Preservation of the natural landscape in Zambia is of great importance during construction because it is much less expensive and more ecologically sound than subsequent restoration.

Restoration of native planting patterns should be used when site disturbances are unavoidable. All good native plants disturbed by construction should be saved and replanted after first storing them in a temporary nursery.

Noxious or toxic plant materials should not be used adjacent to visitor facilities. Eradication or control of exotic species should be considered, without creating negative effects on native plants. Some exotics are relatively benign; others are highly invasive. Ideally, plantings of native materials to control exotics should be used.



Interpretation of the restoration areas will inform and educate the visitor on the value of native landscape restoration. Protection of existing resources in the ecosystem is the fundamental purpose of sustainability.

### **B1.3 Operations and management**

Sustainable development requires an ongoing environmental management programme that covers environmental awareness and compliance, and in the case of tourism development, water and energy conservation, staff training, visitor education and environmental monitoring and evaluation procedures.

#### **1. Environmental Awareness**

Although the environment can be protected to some extent by legislation and regulation, the ideal tourism development is one with a positive or pro-active interaction with the environment. A proactive approach to environmental management may include a commitment to continuous improvement in the areas of economic, environmental and social development. Government as well as tourism operators and the community may become responsible for protecting both the terrestrial and marine resources. It is also possible that co-operative working agreements between tourism operators, the community or landowners and other relevant management authorities will maintain the resource such as beach clean ups and monitor sensitive ecological sites.

#### **2. Water Conservation**

The cornerstone of any tourism development water supply programme must be conservation. Water conservation also includes using water of lower quality such as reclaimed wastewater effluent and grey water for irrigation and toilet flushing. These uses do not require the level of water quality that is needed for drinking, bathing and washing.

Water saving measures include:

- Small sinks (less than five liters)
- Tap aerators
- Low flow showerheads
- Grey water reuse
- Rainwater/stormwater collection and storage
- Low or dual flush toilets
- Automatic turn-off taps
- Low water-use gardens and landscaping

User education and awareness is key to a successful water conservation programme. The visitor should receive interpretation about the source and the types of energy required to process and distribute the water, along with a description of water conservation measures being used. Appropriate signs should be put in rest rooms or bathrooms to indicate that management places high priority on water conservation and confirm goals and expected behaviour of visitors.

#### **3. Waste Prevention**

Experience has now shown that there is no completely safe method of waste disposal. All forms of disposal have negative impacts on the environment, public health, and local economies. Garbage burned in incinerators has poisoned the air, soil and water. Many water and wastewater treatment systems change the local ecology. Attempts to control or manage wastes after they are produced fail to eliminate environmental impacts. The problem is particularly acute along the south west coast where rapid urbanisation has occurred. Although some establishments follow best practice, once the waste leaves the site, it is usually dumped in empty plots, by rivers, and along the coast.

The only way to avoid environmental harm from waste is to prevent its generation. Pollution prevention means changing the way activities are conducted and eliminating the source of the problem. It does not mean doing without, but doing differently. For example, preventing waste pollution from garbage caused by disposable beverage containers does not mean doing without beverages; it just means using refillable bottles.

Preventing pollution in tourism developments means thinking through all of the activities and services associated with the facility and planning them in a way that generates less waste. Waste prevention leads to thinking about materials in terms of reduce, reuse, and recycle.

Everyone associated with the facility must change their habits and adopt a more responsible attitude toward waste. This includes the ownership and management of the facility, as well as the designers, contractors, employees, and visitors. Each of these groups needs to consider the issues so that no waste will be generated that adversely affects the environmental quality of the area.

### **Waste Prevention Strategies:**

Any tourism development is going to have two basic sources of solid waste: materials purchased and used by the facility; and those brought into the facility by visitors. The following waste prevention strategies apply to both, although different approaches will be needed for implementation:

- Buying supplies in bulk to minimize packaging.
- Replacing disposable items with reusable ones (e.g., rechargeable batteries, refillable soap and shampoo containers, and cloth laundry bags).
- Recycling all items for which recycling facilities are available locally.
- Composting organic waste.
- Collecting and removing all litter encountered on tours/excursions in conservation areas.
- Printing all promotional material on recycled/unbleached paper.
- Assisting with the establishment of local recycling infrastructure.

### **Minimising waste:**

Much of the growing volume of garbage is from the use of disposable consumer products and excess packaging. Consideration must be given to materials or products that minimise waste disposal needs. For example, plastics, which account for 20% of solid waste by volumes, are non-biodegradable, difficult to recycle, have high volume to weight ratio, and are toxic when burned. Consequently, communities in the USA are beginning to pass laws banning certain types of packaging that have inevitably become disposal problems.

### **Biodegradation:**

In the process of biodegradation, micro-organisms break down the products of other living things and incorporate them back into the ecosystem. Biodegradable material includes anything that is organic. Most of the organic components of garbage, such as paper and food wastes can be eliminated through composting or anaerobic digestion.

### **Recycling:**

Reuse is the best form of recycling. If a material can be reused it is a resource, not waste. There are markets in the world for many recyclable materials including aluminium, paper, glass, steel, and some types of plastics. These may be available to a tourism development facility depending on location and the quantity of the materials generated. Efficient recycling requires sorting of materials and therefore convenient bins should be provided at the facility for the materials being recycled. If a waste prevention strategy has been fully executed, actual remaining waste should be minimal.

## **4. Energy Management**

Responsible energy use is fundamental to sustainable development. Alternative production and efficient use of energy provide opportunities for increasing benefits to the operator (lower costs) and can be

interpreted (educating and changing the perception of the visitor). Energy awareness will be particularly important when developing small-scale eco-lodge facilities in the more remote areas where connection to the main grid or the transport of diesel for example, is difficult and expensive.

### **Energy Conservation:**

The design of facilities can contribute to energy conservation in many ways:

- Through use of environmentally sensitive building materials.
- Having facilities serve multiple functions.
- Incorporating day lighting and other passive energy conserving strategies appropriate to the local climate.
- Paying proper attention to site planning and building design to reduce the need for air conditioning.

### **Energy Efficiency:**

Facilities should employ efficient methods, devices and appliances to conserve energy. Almost all facets of the facility, visitor services and amenities, can profit from recent innovations in energy efficiency:

- Refrigeration – high insulation levels and efficient compressors will reduce energy consumption significantly.
- Laundry facilities – energy efficient conversion kits are available which reduce energy consumption by two thirds. Laundry should be air dried whenever possible.
- Lighting – natural lighting should be used wherever possible. Where artificial light is needed, fluorescent lighting should be used. They use 75% less electricity and last 10 times longer than incandescent.
- Sensors and controls – lighting, ventilation and other devices or systems can be controlled with a variety of sensors that reduce electricity consumption significantly (occupation sensors, movement detection, door openings etc.).
- Low energy transportation – site layout should encourage walking.

### **Renewable Energy Resources:**

Once energy awareness, conservation and efficiency measures have been employed, renewable energy resources should be investigated for providing the needed energy. Site conditions and available resources as well as energy demand will indicate the sources to develop.

Specific examples of renewable energy resources for smaller scale ‘ecotourism’ developments include solar technologies. A broad range of solar technologies exists – some as simple as building orientation and shading highlighted above:

- Photovoltaic systems provide an attractive option for remote energy generation; solar cells for street lighting etc. They have low maintenance and high reliability.
- Low temperature thermal systems include domestic hot water heaters.
- Medium temperature systems can provide refrigeration.
- Conversion of toilet waste systems to bio gas generation.
- Wind systems such as wind towers to keep buildings comfortable can be incorporated into the architecture. Wind scoops can be used for small power demands such as pumping water.

## **5. Maintenance Management**

The inclusion of the following environmental action ideas will not only positively impact on the surrounding environment but also will yield significant cost reduction opportunities and strategically position the tourism facility to tap into the growing and viable consumer market of ecotourism.

**Management:**

- Work with nature as opposed to overriding it when designing, installing, or modifying facility systems and structures.
- Foster a greater level of local involvement in the planning, development and operation of the facility to establish a community based verses community run operation.
- Develop a means of expanding the role of the facility in the local community to sustain mutual environmental interests through monetary and/or civic activities.
- Establish executive level commitment to the environmental programme.
- Staff meetings to educate staff about environmental concerns.
- Empower employees to implement environmental principles.
- Conduct an environmental audit.
- Plant trees for cooling, using native species.

**Maintenance:**

- Minimise the use of no biodegradable cleaning products.
- Keep air conditioner filters clear.
- Fix leaks promptly.
- Buy unbleached paper towels, toilet paper, coffee filters etc.
- Adopt areas for clean-up.

**Energy/recycling/water conservation:**

- Use the sun rather than electric clothes dryer.
- Install water saving faucets and shower heads.
- Keep buildings cool by using shades, shutters etc. on sunny side.
- Programme for wastewater recycling.
- Employ computer controls for energy use.
- Maximise the use of solar energy.
- Help initiate a recycling programme for the area.

**Restaurant/coffee shop:**

- Minimise the use of throw away plastic cups, plates etc.
- Minimise the use of non-biodegradable cleaning products.

**Shops:**

- Minimise aerosols that contain fluorocarbons.
- Minimise polystyrene foam products.
- Minimise the use of plastic bags where possible.
- Purchase bulk items where possible.
- Print anti garbage and conservation slogans on paper grocery and shopping bags.
- Print anti garbage and conservation slogans on clothing sold in shops.
- Install can crush to recycle aluminium cans.
- Recycle newspapers.

**5. Interpretive and promotional ideas:**

- Publish a conservation newsletter on subjects such as don't waste (take home partially used bathroom articles).
- Use conservation posters.

**6. Staff Training**

Producing an environmental management manual or plan is an essential factor in developing a proactive

approach. A clear environmental policy statement or code of ethics, which is adopted and endorsed by management, will ensure compliance to environmental management standards. This policy would guarantee responsibilities of key personnel towards the environment, along with the training and communications procedures employed to inform and educate employees about the policy.

A policy statement could include realistic environmental management objectives and targets. Procedures and targets may be specified for environmental issues such as environmental protection, waste management and recycling, energy and water conservation, education and research, purchasing or cleaning policies, landscaping and visitor education.

For larger scale tourism developments, it may be necessary to employ an environmental officer to establish environmental procedures and supervise and monitor their practice. Consequently, the impact of tourism development upon the surrounding environment could be monitored. Staff training will ensure how to improve environmental performance. Fostering innovation within the development and amongst staff will encourage improvements in environmental management and performance.

## **7. Visitor Education**

Encouraging appropriate visitor behaviour is best achieved by providing on-site educational guidance. Education may be useful in promoting appropriate visitor behaviour by, for example, encouraging visitors to conserve water (for example, by re-using towels for several days before washing) and not lighting fires for BBQs on the beach. On-site education may be provided in the form of interpretative brochures, displays, guided tours or videos.

The majority of tourists are urban dwellers who want a comfortable, fleeting involvement with the environment. The rest, who include for example, back packers, photographers and specialist enthusiasts, typically already have a highly developed sense of environmental responsibility. The developers should cater for each particular market with pro-active and informative signs where necessary. Advertising brochures should allocate reasonable space to producing information about the project's environment.

In tourism developments that are properly planned, the environmental work often becomes part of the marketing package, as environmental constraints - such as landscape features, inland waters, bird life - become blended into the development and gradually become part of the attraction to tourists.

The maintenance costs of a tourism development will be less and higher efficiency and productivity will occur in the tourism workforce if the management and staff have a proud 'sense of environmental place.'

## **8. Monitoring and Evaluation**

If possible, baseline data should be collected before any construction or development commences. If the development has been in operation for some time, an environmental audit, or an audit of some aspects of performance (such as energy or water conservation and efficiency, or waste management practices) may be useful in providing baseline data and in identifying specific areas where alternative practices can contribute towards improved environmental performance.

A monitoring programme should record regulatory requirements and set realistic management and performance targets or standards, such as for example, a ten percent reduction in water use. It should also establish performance indicators that are easy to measure and that might indicate specific problems preventing the achievement of specific targets. Regular data collection, record keeping and reporting procedures to examine actual performance will need to be established.

In summary, an overwhelming reason why tourism developers should act responsibly towards the environment is that it is in their best financial interest to do so. Pursuing an approach as set out in these guidelines makes good business sense and will help ensure the long term viability of the individual project and of the tourism industry in Zambia in general.

## B2 Community Action Planning

Community Action Planning (CAP) will play a major role in the overall tourism development of Zambia. Components of the CAP process are suggested here, and can be applied to each of the TDAs, TAAs, Community Heritage Corridor and Tourism Circuits and to community tourism projects elsewhere in Zambia.

### B2.1 Setting the Stage

It will be important to encourage widespread community participation in the development of tourism in the TDAs. It is sometimes assumed by those who are based outside communities, that local residents are happy to become involved in tourism, or other new activities. In fact, it is best to discuss with the community the ideas that have been conceived for the area, in a preliminary way, to enable residents to begin to assimilate information, to have discussions among themselves and to find out what the next steps are.

At this point, it would be useful to Set the Stage (Table 1) and have discussions about:

- What the TDAs say about their area.
- Explanation about tourists and what they are looking for.
- Deciding in principle if they would like to be involved in tourism.
- What types of projects have happened elsewhere.
- What the possible conservation benefits would be.
- What other options there are for sustainable development in the area or region.

If the community is not interested or committed, resources would be best used on community development projects elsewhere. While in general, the local communities in the TDAs want the benefits of tourism, it is probable that community residents may lack a general understanding of what is involved and what the potential may be. The Table on the next page illustrates examples of the kinds of activities, products and services, etc., which the community may consider developing to complement their core project and to derive related benefits.

#### 1. Develop Vision and Goals

The community might not use such terms as 'vision'. However, a project starts with a few individuals with a vision - a practical dream of how a specific local area can work for economic benefit, conservation and visitor enjoyment. This makes a good starting point. Visions can focus efforts on specific goals. Clear visions can help groups to understand and support development and conservation efforts.

A thorough discussion of everyone's ideas and suggestions will assist in developing project goals. It is also useful to talk to people to find out what is important to the community, any issues, what is planned for the project area and to think about possible links with the TDAs. This helps establish the general requirements and outline for community participation and involvement in tourism, based on the review and concepts in the TDAs, TAAs and Tourism Circuits and further site visits and consultation.

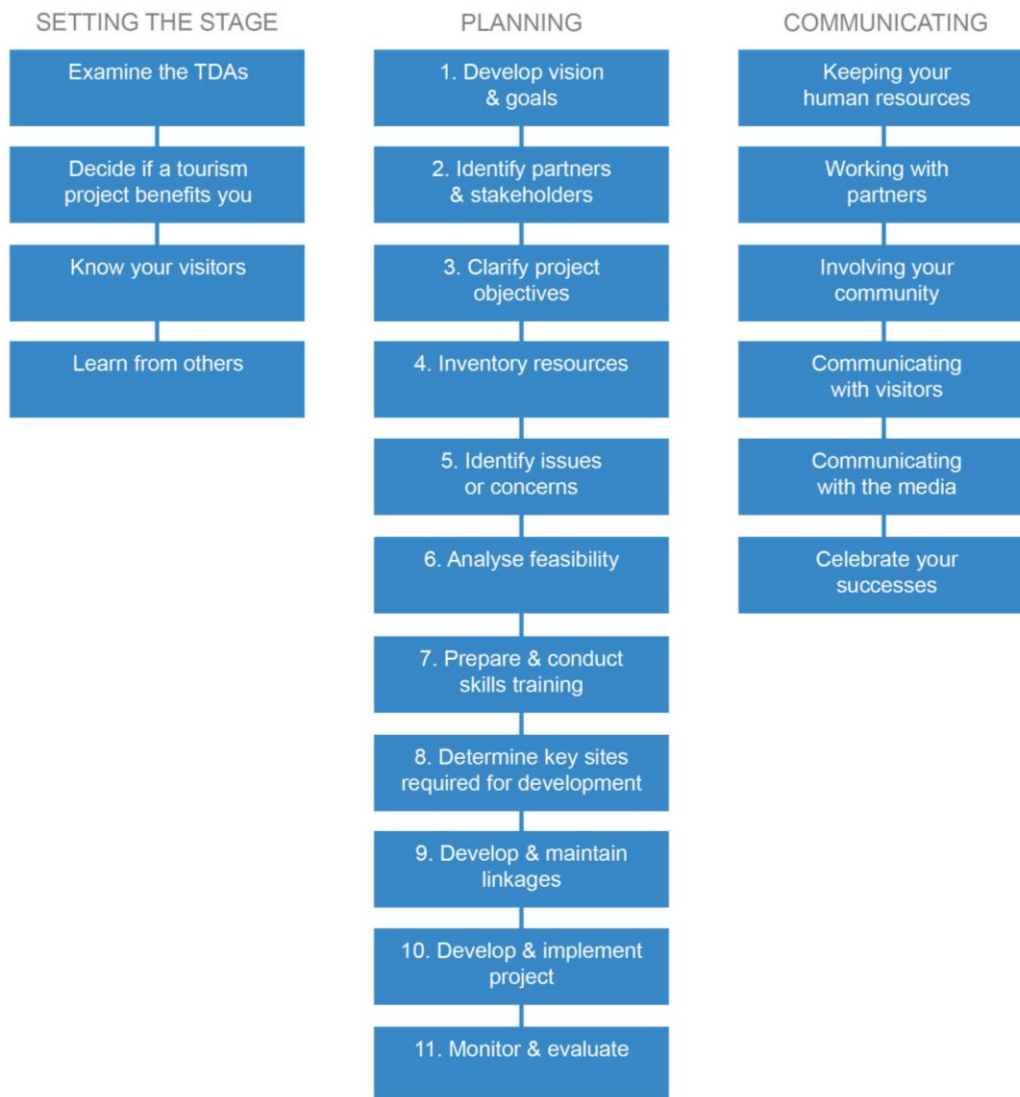
A leader(s) or project champion(s) are needed. This does not mean that an expert decides what is needed and then leads. It means that ideas, developed and welcomed by the community are not dependent on one individual, and do not collapse if the individual is not around. Also, different people may be active at different times and find the community-driven goals to motivate.

**Table 1: Community Experience Opportunities**

Activities	<p>Canoeing, boating, hiking, fishing.  Village stories, legends, myths.  Wildlife viewing, bird watching.  Hunting.  Cooking.  Craft making (pots, woodcarving, matt/basket weaving).  Traditional clothes making.</p>
Static Displays/ Buildings	<p>Art.  Resource/interpretive centres, information centres (e.g., in shops, or kiosks).  Historic buildings.  Living attractions (tours, etc.).</p>
Performances	<p>Dancing of different types.  Song, music.</p>
Products/ Crafts	<p>Jewellery.  Pottery.  Clothing making.  Furniture.  Wood carving.  Matt weaving (bags, purses, hats, etc.).</p>
Nature-Based Foods	<p>Fresh fish (fishing, catching, cleaning, selling, cutting).  Herbal teas, herbal medicines and explanations, teaching.  Vegetables (village markets).  Fruits (all the tropical varieties, plantation or home grown).</p>
Events	<p>Fairs (weekly).  Other (shows, school related, fairs, markets, crafts shows, sports events).  Historic (festivals).  Festivals (dancing).</p>
Services	<p>Tour operations (inbound, receptive, site specific) themed tourism.  Physical activities, nature trails, historic and cultural tours, environmental tours, dancing.  Accommodation (hotels, guest houses, small lodges, camping).  Shops and retail outlets (food and beverage, convenience items – water unsweetened drinks).  Transportation.</p>

## B2.2 Community action planning steps

**Table 2: Community Action Planning Guide**



### 2. Identify Stakeholders and Involve Potential Partners

A collaborative approach aims to harness joint resources, expertise and enthusiasm towards a common goal. It is important to remember that all partners must get something out of the project. The idea of partnership is not only about sharing benefits, but also sharing opportunities. Which comes first, the project or a working group? Either can come first, it doesn't really matter. It is simply important to invite selected interests to the 'table'. Provincial and local government, DNPW and private sector should be involved early, as well as any prominent groups in the community whose objectives seemed to overlap with those of the initially conceived project.

Suggested partners or members of the group could be local land owners, fishermen, cultivators, those with accommodation for visitors, tourism industry, conservation groups, elected officials, religious representatives, provincial representatives, naturalists, financial community, opinion leaders. Projects are most powerful if many rather than just one player or community group supports them. It is important to involve them all early in the process, so as to obtain their 'buy in' and to benefit from the skills and contributions as early as possible, as well as their contributions to solving local issues.



Partners also need to benefit from the project, but also need to offer some contribution (support, materials, services or products in kind, advertising, training, technical assistance, volunteer time, etc.). The main thing is to have the right kinds of partners - those who will champion project objectives. They may also contribute to funding requirements.

**Money might be needed for:**

- Correspondence and information distribution
- Advertising (events and activities)
- Logistics for events (rentals, etc.)
- Administration costs (photocopying and supplies)
- Hiring expertise
- Access to information (e-mails, reports)
- Supplies for projects (building materials, tools, equipment)

Wherever possible, visitors should be given the opportunity to contribute to the costs of the resources/programmes provided for their use and enjoyment. In many projects it is common that visitor fees cannot be charged directly (although if packaged by a travel agent, there will be charges). It is also rare that businesses/individuals which benefit from visitors (shops, food outlets, accommodation, petrol stations, etc.) contribute directly towards the potential social and environmental costs of the visitor activities. However, community projects are actually a good opportunity to involve the visitors.

There may be many different forms of community involvement in tourism – the options are not simply ‘outsiders operating in or exploiting the community’ or ‘community ownership’. Outside businesses and agencies may be very positive partners. These are outlined in Table 3.

### **3. Clarify Project Objectives**

It is important that everyone be clear early in the project, about:

- What the project is to be.
- The best way to involve the community and work together.
- What to avoid.
- Principles.
- What the priorities are.

Objectives help in actual project implementation. In addition, being clear on what people do not want may be equally important. The time taken to reach agreement on the objectives may vary with the scale of the project, the number of people or groups involved, and the number of issues to be addressed.

**Table 3: Different Forms of Community Involvement in Tourism**

Type of Enterprise/ Institution	Nature of Local Involvement	Examples
<ul style="list-style-type: none"> <li>Private business run by outsiders</li> </ul>	<ul style="list-style-type: none"> <li>Employment</li> <li>Supply of goods and services</li> </ul>	<ul style="list-style-type: none"> <li>Kitchen staff in lodge</li> <li>Sale of food, building materials etc.</li> </ul>
<ul style="list-style-type: none"> <li>Enterprise of informal sector operation run by local individuals</li> </ul>	<ul style="list-style-type: none"> <li>Enterprise ownership</li> <li>Self-employment</li> <li>Supply of goods and services</li> </ul>	<ul style="list-style-type: none"> <li>Craft sales, food kiosk, campsite, home stays</li> <li>Guiding services</li> <li>Sale of fuel wood, touting</li> </ul>
<ul style="list-style-type: none"> <li>Community enterprise/CRB</li> </ul>	<ul style="list-style-type: none"> <li>Collective ownership</li> <li>Collective or individual management</li> <li>Supply of goods and services</li> <li>Employment or contributed labour</li> </ul>	<ul style="list-style-type: none"> <li>Community campsite</li> <li>Nature resource</li> <li>Cultural centre/ museum/ craft centre</li> <li>Guesthouse</li> </ul>
<ul style="list-style-type: none"> <li>Joint venture between community, government and private operator</li> </ul>	<ul style="list-style-type: none"> <li>Contractual commitments or shared ownership</li> <li>Share in revenue</li> <li>Lease/ investment of resources</li> <li>Participation in decision-making</li> </ul>	<ul style="list-style-type: none"> <li>Revenue-sharing from nature resource, historic house, lodge and/or tour operation to local community on agreed terms</li> <li>Community leases, land/ resources/ concession to sites/ lodge/ tour operation</li> <li>Community holds equity in site/ lodge/ tour operation</li> </ul>
<ul style="list-style-type: none"> <li>Tourism planning body/ agency</li> </ul>	<ul style="list-style-type: none"> <li>Consultation</li> <li>Representation</li> <li>Participation</li> </ul>	<ul style="list-style-type: none"> <li>Local consultation in regional tourism planning</li> <li>Community representatives on tourism board and in planning</li> </ul>

#### 4. Inventory Resources, Management and Uses

It is important to understand the key features of the area, its resources, problems, who the resource managers are, and current land uses and users. Knowledgeable local people are usually sufficient to do an inventory, plus government/agency information and reports. Any information about the scientific or other value of the resources should be mentioned, as it interests the tourists. Resource use information can generally be gathered at the same time as resource inventory activities. Describe the natural resources and ecological systems, providing an overview of the features relevant to tourism and cultural landscape/history interpretation. Record the features of interest to the visitor and relevant to tourism. This is good for subsequent interpretation or PR activities.

Obtaining maps is also helpful. All the information should be summarised and where appropriate, mapped. Reports often already have the material in a useful form. Maps should show ownership, access points and any known plans (e.g., for development on, or adjacent to the resources). These maps form a base for planning the project, informing the public, and marking the geographic boundaries of the project.

Prepare an inventory of all stakeholder organisations and any existing community-based tourism/opportunities, to understand the present community and stakeholder characteristics of the area.

Questions which may be helpful for describing use, or for interpretation purposes are:

- What agency or individuals administer the proposed site/area?
- What kinds of protection or designation have been or could be given to the site?

- What, if any, transportation, commercial or recreational developments are planned for the site?
- What restrictions apply to the site, e.g., land use bylaws or municipal plans?
- Is there public access to the site?
- What natural processes can be seen at this site (flooding, disease cycles, plant succession)?
- What areas are critical to birds using this site (e.g., nesting habitat, migration staging areas)?
- What areas are critical to other wildlife using this site?
- What plants or animals are using this site (species, seasonal changes, rare endangered)?

## 5. Identify Issues or Concerns

This step is intended to assist in a realistic assessment of the potential for successful tourism activities, with a view to avoiding possible problems. Project managers/local coordinators must understand how visitors might impact the site, what causes wear and tear, what resources are fragile and which areas must be protected. They should also be aware of the cultural and other issues that concern the local community and the owner/manager of the tourism resources.

In a number of communities and sites in other countries, there are conflicting activities or land uses. For example, the formal and informal accommodation sector, the springing up of small shops or stalls beside any tourist attraction, licensed guides and tours. There are always likely to be issues and conflicts for any land area. These may be difficult to resolve. However, whenever an individual or group is part of a problem, they need to be part of the solution. So it is important that they be involved in the process. Usually, it is not 'outsiders' who have the answers to problems, but those who will live with the future, who hold ideas or solutions. They must be involved in addressing the issues.

Similarly, there may be issues related to successfully attracting visitors, unless there is agreement about how to manage them, such as:

- Agreements with tour operators about numbers and size of groups the community wishes.
- Codes of conduct.
- Quality of what is offered or sold to visitors.
- Formal or informal zoning of areas visitors will be allowed.

Some questions for issues analysis include:

- **What?** What or who is being affected and to what degree? What information is available? Does information conflict? Is there legal basis? What is the significance to the project?
- **Who?** Who is involved in the issue? Who has responsibilities? Do values conflict? How does each party relate to one another? How can this be tackled?
- **Where?** Where does the issue occur? How widespread are the effects?
- **When?** When does or when did the issue occur? Is it a slow, steady occurrence, or an immediate, very dramatic occurrence?
- **Why?** Why is the issue happening? Is there an easily identifiable cause?
- **So What?** Examine how knowledge of these might be used in a positive fashion to educate the tourist about ecological, cultural or other interconnections

## 6. Analyse Potential and Feasibility

To be viable and realistic, projects must be based on an understanding of markets and how to place the product offered effectively in the marketplace. A project can be developed in different ways. For example, it could be developed in conjunction with commercial tourism operators or guides; or with non-commercial individuals or agencies wishing to attract visitors who are on day visits or just passing through; or oriented more to resources conservation. It could be stand alone, or very much integrated with a regional or larger system.

Examples of questions to help refine a project concept for feasibility study could include:

- What are the main options for the tourism project?
- What are the disadvantage and advantages of each option?
- Are the activities likely to appeal to visitors?
- What is the intrinsic appeal of the area to markets, and which markets?
- Are permits/licences required for any of the project elements?
- What facilities are needed and where?
- What would be the visitation season(s)?
- What would be the maximum number of visitors expected/desired at any one time?

It is important, also, that the expectations of both the community and the visitor are met, to realise project benefits (related to accommodation, food, payment and how, transportation, activities, products and souvenirs, and revenue distribution). Economic feasibility depends on costs, revenues and other benefits which the community might receive (e.g., jobs, technical assistance, resource conservation, or enhancement of community recreation opportunities and quality of life).

## **7. Prepare and Conduct Skills Training Programme**

It will be necessary to prepare a skills development programme for pilot communities for community tourism enterprises. This task will include: preparation and implementation of training for an alternative livelihood programme, cooperative development, and community based enterprise development. Precise skills training related to those included in the programme, need to be determined earlier in the CAP formulation stage.

The training programme will then need to be implemented for selected communities in accordance with project requirements. Implementation of training is the main task, but it may be implemented in stages, depending on the skill set required. In addition, it would be helpful to maximize a hands-on manner of training and possibly to use a train-the-trainer approach for each community.

## **8. Determine Key Sites Required**

Some community projects may focus more on cultural assets (Livingstone, Community Heritage Corridor); others may focus on natural assets (Kafue, Luangwa Valley). Considerations for determining sites might include:

- Reasonable opportunity for wildlife viewing - high probability of seeing wildlife, at least during a specified season(s).
- Ability to withstand visitation - fragile ecosystems or habitats with sensitive species should not be selected unless public use can be restricted or managed so as not to harm the site's natural values.
- Reasonable access - all sites should be reasonably accessible to the public by whatever is the selected means (vehicle, foot, boat).
- Scenic quality - ideally, it is best if scenic and wildlife values of the site are not be degraded by visible conflicting land uses (e.g., garbage lying around, solid waste dumps, etc.).
- Legal access - if land is privately owned, the landowner should be willing to guarantee, in writing, public access to the site.
- Significance - emphasis should be given to high-quality or significant sites, both natural and cultural heritage sites.
- Minimal conflicts - there should be few or no incompatible activities, or user conflicts.
- Interpretation - there should be special efforts to promote or interpret the values of the site, to link with community/area attractions and the Northern Region Tourism Development Programme.

## 9. Develop and Maintain Linkages

The intent of the community tourism project should be to tie local opportunities into the TDAs, to increase the potential beneficial impact. So it is appropriate to look at linkages at various levels: national, regional, provincial and local. After the sites are selected and community plans made, it should be possible to identify:

- Opportunities for theming which complement the regional strategy.
- Visitor access routes (or proposed routes) to various interpretive resources.
- Any potential linking of sites for developing local tours.
- Any duplication.
- Potential for distributing visitor flow and use of under-used areas.
- Potential conflict with other sites (e.g., cultural sites, features needing special management).
- General visitor flow to and through the area, beaches, mangroves, forest, fields, or other site.
- Potential bottlenecks or other flow problems.
- Short or longer trails or loops.

## 10. Develop and Implement Project

When the development project has been agreed, the needed facilities can be decided in or around the community, or at particular sites. The level of appropriate facilities may vary. The community needs to decide where and if there should be such things as: garbage cans, toilet facilities, signs, trails or boardwalks, viewing platforms, interpretive signage or kiosks, brochures, visitor centres, shops, guided tours, or any number of other facilities, tours or services. There needs to be:

- A Resource Management Strategy - to decide how the project will be run on the land, and what activities and uses will be allowed. Maps and guidelines help. Low maintenance programmes are preferable. The type and level of tourism planned must be appropriate for natural resources and cultural heritage, and consistent with the community's wishes and expectations.
- A Visitor Management Strategy - to tackle the different demands made by different types of visitors, and their different impacts. Visitor management is very important in both communities and natural areas.
- An Interpretation and Information Management Strategy - to provide information (for overnight visitors, the project, behaviour, activities, etc.), guidelines for visitors (codes or guidelines), education and interpretation (materials, signage, etc.). There should be a range of information outlets. And the kinds of interpretive information should be oriented to visitors' learning, behaviour modification and emotions.
- An Operational Strategy - to detail how the project will operate, including scheduling, construction, activities, interpretation, human resources, facility management, transportation, waste management, and safety.
- A Marketing Strategy - to indicate all the ways that local and distant visitors will be made aware of and attracted to the project. It should be realistic about the markets, indicate the contents, the communications mechanisms, and suggest partners (e.g., joint actions with a tour operator).

These do not necessarily need to be sophisticated documents, but need to address the topics.

## 11. Monitor and Evaluate

Monitoring the community project is very useful for success, particularly regarding visitor attitudes and satisfaction. It is also helpful for improvement, particularly regarding project organisation and management. Research and monitoring may often be carried out with partners.

The scale of monitoring often depends on project scale and complexity. The objectives developed for the

project initially, as well as project parameters and identified issues, can allow the measurement of social, economic, and conservation objectives.

Continuing community participation in monitoring adds to the sense of ownership, and so to success. Some questions which might help with project evaluations are:

#### **Questions which help evaluate project work**

- Did you achieve your goal? If yes, how? If no, identify why and learn.
- Can you build on the strengths?
- Did you choose the most appropriate actions?
- Did you adjust your plan as you proceeded?
- What have you learned for the next goal?
- Did your community work well together?
- Were any key interests forgotten?
- Do you need support, e.g. group facilitation, filing, administration?
- Are volunteers maintaining commitment, or burning out?

A recurring problem with many community-based tourism projects is that they have been established as part of externally-funded and assisted initiatives, so there has been a tendency not to continue satisfactorily after the life of the aid programme. Thus it is important that:

- A reasonable time is provided for any aided project, so withdrawal of assistance does not occur too early.
- An 'exit strategy' is worked out early.
- All assisting bodies and partners provide skills or know-how to the local people throughout the project.
- A strategy of long-term local ownership is maintained.
- There is use made of any private sector, NGO, local or national agency support which is ongoing.

### **B2.3 Communications**

As Table 2 showed, there is an important set of communications activities required as part of CAP activities (indeed, in any tourism activities). In tourism, agencies and enterprises are most often focussed on communicating with visitors, through marketing plans. However, all stakeholders mentioned earlier, need good communications:

- Staff - these could be paid staff or volunteers, and they have rights, as well as responsibilities, and need to know what is required of them.
- Partners - these may be for support, funds, technical assistance, communications, training, etc., and a 'thank you' communication to those who provide support, is always welcome.
- Community residents - often "informal communications" is the mode of communications in villages. But more formal communications may be required for accurate information, e.g., via public meetings, exhibits, displays or posters in the biggest shop, or making a presentation at the school. Communicating with residents helps educate them about the benefits and values of the project, and explains the process as well as visitor needs.
- Visitors - visitors need information, directions, and orientation.
- Media - getting the word out is an important part of any project, whether to local regional, or national media. Partners, such as the Ministry of Tourism, may be helpful in this.

- With each other - celebrating project successes or milestones, however small, is a great positive communications tool for participants and media. Everyone likes to be involved with a winner.

## B3 Urban design

There have been many definitions of urban design, mostly overly complex. Urban design is about creating places. That is the arrangement of the buildings and the space between them. Urban design is not 'big architecture', neither is it 'little planning', it is the overlap between planning and architecture - a multi-disciplinary activity which aims to produce attractive and usable environments.

### B3.1 The public realm

A continued and concentrated effort is required to improve and maintain a physical setting which is visually interesting, distinctive, comfortable and inviting for tourists and local residents. This is particularly important for the heritage areas such as Ilha de Mozambique.

The public realm is the most important part of a place. It is where visitors and locals meet. It is defined as being those areas, which normally lie between recognised frontages of buildings. It is where the greatest amount of human contact and interaction takes place, thus it extends from the street, parks, pedestrian areas of the city and towns into buildings, which enclose and line them.

### B3.2 The key elements of urban design

#### A Place for People

To be successful as a tourism destination, the tourism areas must be successful as a *place* for people. Although a unique cultural heritage area, good vehicular access and convenient parking are all valuable assets, it is the quality of the experience of walking through an area that is the most fundamental measure of its success as a *place*.

The place should:

- Offer easy, convenient and continuous pedestrian access between shopping, accommodation, activities and other uses.
- Establish a high level of amenity and, human scale and physical and psychological comfort.
- Provide opportunities for social interaction as well as opportunities for observing the life of the place.
- Encourage activity on the street and in a variety of public spaces.
- Foster the variety that provides opportunities for choice, surprise and adventure.

Certain sorts of physical elements play a key role in the success of the development of places:

**Paths:** - they are channels of movement - streets, alleys, main roads etc. - and many people include them as the most important features in their images of the place.

**Nodes:** - nodes are focal points.

**Landmarks:** - in contrast to nodes, which can be entered, landmarks are point references which most people experience from outside.

**Edges:** - edges are linear elements which are used to define paths and the water's edge.

**Districts:** - paths, nodes, landmarks and edges all constitute the *place* - the TAAs.

The following sections are based on these elements.

### B3.3 Spaces

#### 1. The Town Square

Each city or town should have a heart. The design of this space will have a significant influence on its capacity to attract and accommodate a variety of activities. The primary design considerations include the relationship between the public space and the adjacent streets, the type and amount of seating provided, the potential for flexible use, the level of physical and psychological comfort and the level of amenity, including the degree of attention paid to quality.

**Relationship to the street:**

Maximum visibility and accessibility of the public space must be provided. People enjoy watching pedestrians walk along the footpath and people visible within the space draw other people. Visibility is also important for security.

**Comfortable seating:**

One of the most important factors influencing public space use potential is the number and variety of opportunities for sitting. Plenty of seating areas should be provided; a good rule of thumb is to require on linear metre of seating space for every 30 square metres of plaza area. Seating can be built into the space in the form of steps, walls and ledges. The use of fixed individual seating should be avoided; movable chairs, in addition to conventional benches, allow users maximum flexibility in choosing where to sit and how to relate to other people.

**Flexible use:**

The design of the Square should avoid dictating single, specific uses of space by creating, for example, an amphitheatre that is used only during limited special events periods. Nor should the central place be cluttered with a large number of fixed elements. Broad paved areas should be provided where intensive activity is anticipated. To maximize flexibility, raised planters and other massive fixed furniture elements should be avoided, especially in the centre of the space.

**Comfort:**

Trees of substantial size should be provided within the public space to create a sense of scale and provide a canopy of shade. The area located under a tree canopy tends to become the zone most intensively used for informal activities (meeting friends, people watching).

Dark coloured paving materials should be used to reduce glare and heat reflection. The use of special paving materials will create a sense of richness and visual interest. Public art, sculptures and banners should be used to stimulate and please the senses.

**Quality and simplicity:**

In designing the Square, it is important to recognize the quality at all scales, from the overall concept to the smallest detail. The highest possible quality in materials and detailing will provide an expression of concern for human values as well as durability and maintainability. The basic elements such as paving, trees, seating and lighting should receive first priority.

**Other Public Spaces**

Smaller public places are important to help build a special identifying focus in the tourism areas. These public spaces can act as connectors or links between areas, entrance definers and amenities and catalyst for private development.

**Design:**

In designing these smaller public places, all the criteria for the City Square should be applied and scaled appropriately to the size of the space.

**Location:**

The location of smaller public spaces is also important. They should relate to pedestrian streets and other public spaces as part of an integrated system. In addition, they should be located to capitalise on the importance, landmark potential and higher levels of activity occurring where paths of pedestrian movement intersect.



## **2. Small Parks**

Parks contribute to a tourism area's character by creating refreshing counterpoints to the urban setting. These green spaces provide opportunities for informal recreation and play an important image building role. In designing these spaces, emphasis should be placed on establishing high quality lawn areas and tree planting. Informal planting designs are desirable. Simplicity in design is the key to success.

A waterfront is a special space opportunity. The water's edge serves as a natural magnet for people and as a valuable recreational and visual resource. Open views and access to the water should also be preserved along the streets that terminate at the water's edge.

## **3. Interior Public Spaces**

In future developments, galleries, atriums and arcades provide interior social spaces and pedestrian connections that make the area more interesting and enjoyable for shoppers, residents and visitors. Light, plants, water features, shop fronts and cafes can energize these spaces to create a marketable identity for individual projects and a new dimension to a tourism area. Visibility and accessibility from the street are crucial in ensuring that interior public spaces are well used.

## **4. Landscaping**

Canopy Street planting is one of the tourism area's most important streetscape features and probably one of the best urban design investments. Besides providing a unifying visual link between spaces, planting also has many other uses. Tree planting can create an outdoor microclimate which is conducive to comfortable living. Outdoor spaces must take account of the climate, especially the heat in the afternoon which must be overcome by the provision of shade and shelter.

The use of planting can also:

- Screen elements such as car parks, buildings and trash bins and define the street edge.
- Be used as a space definer to give unity or to link a building with the landscape
- Frame a view.
- Bring nature into an area and create wildlife habitats.
- Improve energy efficiency by establishing shade to buildings.
- Soften and quieten an area where extensive hard surfaces are used.
- Reduce the effect of glare from sunlight by dappled light and movement.
- Reduce heat build-up on hard surfaces which make both people and plants uncomfortable. The introduction water also helps to 'cool' the environment.

The choice of species needs to take account of the ability to withstand adverse climatic conditions of sun and heat and possible shortage of water.

## **5. Car Parking**

One of the most important issues in making a tourism area a quality place for people, is the way parking is handled. A tourism area cannot have a pedestrian orientation, a concentrated diversity of uses or a continuity of street level activity if parking receives the highest priority. Although an adequate supply of convenient parking is essential, it must minimise the land area required.

To minimise the impact of parking on visual quality, parking frontage on major routes and key pedestrian streets must be strictly controlled. Car parks should be designed to operate efficiently, but they should also be as attractive in appearance as possible.

## B3.4 Street furniture and paving

'It's not what you do, it's the way that you do it', is probably the cardinal rule in furnishing urban spaces. Urban spaces are our outdoor living rooms and the choice of furniture and especially the manner in which it is sited, are major elements in the visual success or failure of the surroundings.

### 1. Street Furniture

The highest quality street furniture and streetscape materials should be used. The fundamental elements of a quality public environment - seating, trees, lighting and paving - should receive top priority. Maintenance should be considered with the initial capital funding strategy.

Five criteria have been set out to be considered in the selection process of street furniture:

- **Suitability** or fitness for purpose is clearly a crucial factor. Is the sign big enough or too large for its function? Is the seat comfortable, as well as looking good?
- **Size and scale** are not always considered sufficiently when street furniture is selected.
- **Materials** and their psychological impact are important. A concrete seat will certainly look heavier than a wooden one, even though its size is similar.
- **Maintenance** is clearly a major factor.
- **Fixings and mountings** need consideration in that multiple use and flexibility can improve the versatility and reduce the number and range of supports needed.

### 2. Seating

While an ample amount of well-designed seating is important in increasing the tourism area's level of comfort, the street is not always the best seating location. Seating opportunities can be provided in the design of buildings, parks and squares by using ledges, steps and walls, as well as moveable tables and chairs and more conventional benches.

Seating areas should generally be protected from main pedestrian routes and they should cater both for those who like sun and for those who prefer shade. If seating is located on the street, it can best be accommodated in a broad pedestrian zone, arranged perpendicular to the street, providing opportunities for people watching. It is important for seating to be arranged, not with geometric order in mind so much as with appreciation of how people will enjoy the location.

### 3. Bins

A vocabulary can be built up combining other essential items of street furniture, thus simplifying the overall problem of co-ordination. The choice of materials should harmonize with local building materials. Reconstructed stone or easily cleaned fine exposed aggregate concrete is an obvious choice in city areas.

The obvious rule is therefore to site bins close to the point of litter production in positions where they can be integrated with other elements of street furniture and where they can easily be emptied.

### 4. Bollards and Planters

As with most other elements, co-ordination and simplicity are the most effective disciplines, particularly as regards to the design of bollards, planters and flower boxes.

Where modern railings are needed to protect pedestrians, something straight forward, bold and sturdy should be chosen. Aluminium with a suitable finish, iron, steel and timber are all possibilities. A simple steel tube, bent to form both post and handrail, might be a sufficient barrier in some places.

## 5. Advertising and Signboards

Advertisement signboards are often placed where they obscure views or are insensitive to adjacent buildings. It is important to balance advertising revenue with townscape considerations and boards should only be located where they do not cause visual disruption. Places where large advertising boards and spaces are appropriate are:

- To screen unsightly buildings.
- To screen large, unattractive infrastructural works.
- To relieve large blank façades when the space is designed as part of the building.

Advertising of every description should be controlled to the fullest extent.

## 6. Paving

The choice of surface is a critical element. The selection should relate to the users of the area, for example vehicle movement, pedestrians, dual use, seating, parking, planting and should be consistent throughout. The materials and appearance of the flanking buildings need to be taken into consideration. It is a matter of balancing usage with physical quality in terms of durability, colour, texture and pattern.

Designers and architects sometimes fall into the trap of considering pedestrianisation in two dimensions - as a plan - usually providing banding and geometric design in paving. This is often treated with apathy by actual users of pedestrian areas. Do less, better and provide simple, uncluttered but high quality environments.

The aim should be to enhance and complement existing structures rather than to display excessive visual virtuosity, which can sometimes detract from the existing scene.

## 7. Memorable Streets

A co-ordinated series of improvements can make a tourism area feel special and welcoming and using local designers and artists can achieve the most from limited financial resources. Public art, including the use of sculpture, fountains and building graphics, can become one of the tourism area's identifying themes. Even utilitarian components of the urban environment - manhole covers, fire hydrants, fencing and signs - can become art when carefully designed.

In addition to supporting the identity of downtown, public art can help humanise the environment. It can introduce a sense of humour and add meaning to the area. Flags, banners, new signage and colourful awnings and canopies can all help to make the place memorable, user friendly and fun to visit. Special street lights and lighting effects at relatively low costs can make quite ordinary buildings seem magic and help to make the area seem livelier and safer by night.

## B3.5 New development

### 1. Infill Development

Infill development, which repairs and strengthens the urban fabric by eliminating gaps created by vacant lots and surface parking, is a development priority. The pedestrian spine, primary routes and local streets are the priority locations for infill development. Infill buildings must be sensitively designed to reinforce the positive characteristics of the existing architecture and theme of the tourism area.

A blend of old and new buildings can add variety, interest and depth to a tourism area's visual character. Similarly, strong contrasts in building design can be exciting and dramatic when they create meaningful focal points and landmarks. But to be effective, the contrasting structure must be set within a relatively

quiet context of similar buildings. In small areas, strong contrasts must be carefully introduced to avoid destroying the existing order. If infill buildings are to be compatible with existing development, they must be reinforced with elements that create design linkages. Each block and each street will have its own vocabulary.

## **2. Major New Development**

The principal challenge in designing major development projects is the successful incorporation of large scale structures into the existing context. The use of development briefs with the proposals reviewed by the Design Review Panel, is highly recommended for key sites within the tourism areas such as Livingstone.

## **3. Setting Appropriate Height Limits**

A number of considerations determine the appropriate maximum height of new development. One important consideration will be to determine the capacity to accommodate increased traffic and parking demands without negatively affecting the quality of the street level environment and overall identity and human scale of the tourism area. However, the consideration should not ignore the fact that design treatment of the street level is just as important as the height of the building.

**Skylines:** Some basic principles on design and location are:

- Tall buildings should not be located in areas where they destroy an existing coherent townscape of merit.
- Tall buildings can add to the drama of city skyline. They should therefore be located carefully to emphasise a place or define an area.
- Tall buildings should preferably be located where they mark a gateway or terminate a key view.
- Tall buildings should only be located where they don't adversely affect the environment in terms of overshadowing and wind effects; particularly sensitive are public open space areas.
- Tall buildings are very prominent, their design should therefore be of the highest architectural quality in form and detail.

### **B3.6 lighting up the tourism areas**

Lighting places and buildings is both an art form and a science, with much more to it than merely choosing attractive lamp standards and calculating suitable spacing for them. The real challenge is to understand what we are really trying to achieve. Do we, for example, really want each route to be lit at the same brilliance? Would it be better for lighting along a route to build gradually to a maximum and then taper off? Can the light change colour - to signal something. We have some special key buildings that, if lit correctly, can enhance the image of the area.

The successful design of outdoor lighting calls for a special awareness of the qualities of the place.

#### **1. Lighting Buildings**

Historic buildings, with rich architectural detailing and focal points, can become prominent highlights when lit at night. New buildings of architectural interest should be articulated at night through appropriate lighting. Developers and architects should be encouraged to consider the night-time contribution of the building at an early stage. Entertainment buildings are a key to the night use and need a bright and welcoming appearance after dark.

Water and light together make for a memorable night-time. New development on the waterfront, particularly for public use, should exploit this potential.

## 2. Lighting for Safety

The tourism areas at night should be perceived as places that attract people. Key pedestrian routes must be well lit. Spaces must present this night-time vitality if they are to be well used. The areas should be a night-time spectacle. They should be judged by night as well as day and it is vital that new developments contribute to their night image.

Project Team for Formulation of the ZTMP

Ms Bupe Kaonga, Director Planning and Information Ministry of Tourism and Arts

Mr Lucas Zulu, Principal Planner, Ministry of Tourism and Arts

Consultants:

Dr Mike Fabricius, Team Leader and Marketing Expert

Mr John Robinson, Tourism Planner

Mr James Fletcher, Tourism Economist

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Email [bkp@bkp-development.de](mailto:bkp@bkp-development.de)

Web: [www.bkp-development.de](http://www.bkp-development.de)



**Republic of Zambia**  
**Ministry of Tourism and Arts**

Kwacha House  
P.O. Box 30575  
LUSAKA, ZAMBIA  
[www.mota.gov.zm](http://www.mota.gov.zm)  
[info@mota.gov.zm](mailto:info@mota.gov.zm)