

**REPORT OF THE AUDITOR GENERAL ON THE PERFORMANCE OF THE
TOURISM SECTOR IN ENSURING AN INCREASE IN THE LENGTH OF STAY OF
INTERNATIONAL TOURISTS**

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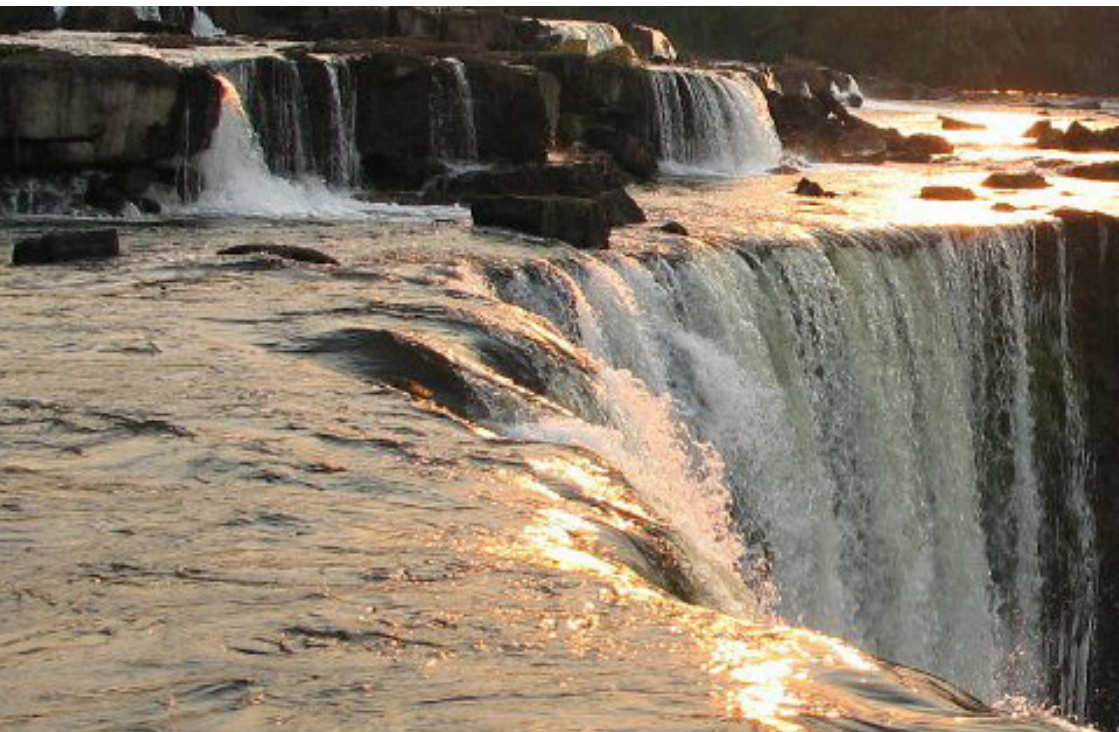
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TABLE OF CONTENT

Abbreviations	5
Introduction	6
Findings of the Auditor General’s Office	8
Governments Measures to Restore Growth and Diversify the Tourism Sector	15
Tourism Reform Recommendations	19
Recommendations	22
Conclusion	25

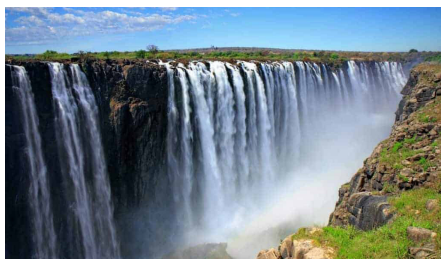


ABBREVIATIONS

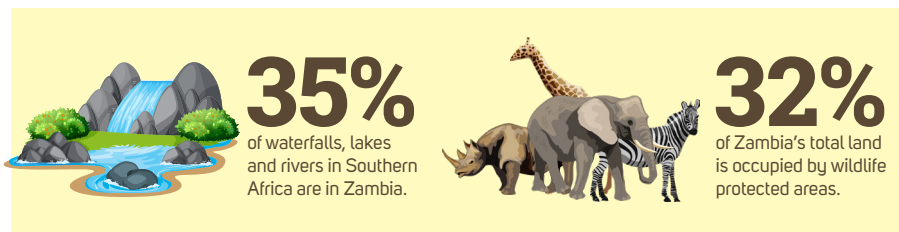
7NDP	Seventh National Development Plan
AG	Auditor General
ERP	Economic Recovery Programme
GDP	Gross Domestic Product
KPIs	Key Performance Indicators
M&E	Monitoring and Evaluation
MoNDP	Ministry of National Development Planning
MMS	Management Monitoring System
MTA	Ministry of Tourism and Arts
NAC	National Arts Council
NHCC	National Heritage Conservation Commission
OVP	Office of the Vice President
TIDP	Tourism Infrastructure Development Plan
USD	United States Dollar
ZTA	Zambia Tourism Agency



INTRODUCTION



Zambia stands out as one of the prime tourism destinations in Africa offering a wealth of natural tourism assets such as waterfalls, lakes and rivers which hold close to 35% of Southern Africa's total natural water resources, and wildlife protected areas occupying about 32% of the country's total land area. Zambia is divided into two tourism circuits, namely the Northern and the Southern Tourism which are highly endowed with the wealth of natural tourism assets (*Office of the Auditor General, 2020*).



The tourism sector is an important contributor to the country's economic development through job creation, foreign exchange earnings, contributions to Gross Domestic Product (GDP) and other economic facets. **The Seventh National Development Plan (7NDP) recognises tourism as one of the sectors for economic diversification and job creation due to its potential to generate revenue, foreign exchange earnings and employment.** Research conducted by Tabetando in 2020 showed that in 2019, Zambia's tourism industry **contributed 7% of GDP (USD 1,701 million) and 7.2% of total employment (469,000 jobs)** whereas international visitors spent USD 849 million, representing 10% of Zambia's total exports.



ZAMBIA'S TOURISM INDUSTRY 2019 STATS

7%

of Gross Domestic Product (USD 1,701 Million) in 2019.

7.2%

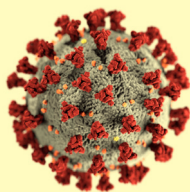
of total employment equating to 469,000 jobs.

10%

of Zambia's exports (USD849 million) was generated from international visitors.

It is evident that Zambia's **tourism sector has the potential to contribute to the country's economy**, however, the sector faces a number of impediments which are highlighted within the Seventh National Development Plan such as the **lack of a comprehensive national tourism plan; underdeveloped tourism-related infrastructure; limited investment in the tourism sector by both local and foreign investors; limited tourism product offering range and scope; inadequate tourism promotion and marketing; low participation by locals in direct and indirect tourism development; and Zambia being perceived as high cost.**

The sector has also been one of the most affected by the COVID-19 pandemic. During the first half of 2020, the country received only 290,244 international tourists compared to 634,757 during the same period in 2019 representing 56.3% decrease (Government of the Republic of Zambia, 2020). Out of 257 lodges and camps, 165 have closed with over 7000 jobs likely to be lost. In addition, 165 tourism businesses in Livingstone and Zambia's protected areas face bankruptcy (Tabetando, 2020). In order for Zambia to fully benefit from the tourism sector, there is the need for urgent action to address the challenges the sector faces.



290,244

international tourists visited Zambia compared to **634,757** in 2019 representing **56.3% decrease**.

165

lodges out of **257** lodges have closed and will likely affect **7,000 jobs**.

165

tourism businesses in Livingstone and Zambia's protected areas face **bankruptcy**.

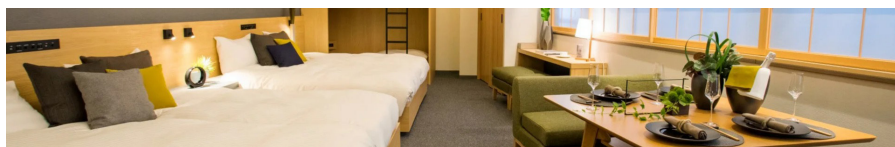
The Office of the Auditor General in accordance with Article 250 of Constitution of Zambia (Amendment) Act No. 2 of 2016, Public Audit Act No. 13 of 1994 and the Public Finance Management Act No. 1 of 2018 conducted an **audit to assess the extent to which the measures put in place by the Ministry of Tourism and Arts had promoted an increase in the average length of stay of tourists visiting the Southern and Northern Tourism Circuits in order to improve the performance of the tourism sector.** This document seeks to provide an analysis of the Auditor General's findings and measures put in place by Government to restore growth and diversify the tourism sector going forward.

FINDINGS OF THE AUDITOR GENERAL'S OFFICE



The main objective of the audit was to assess whether the measures put in place by the Ministry of Tourism and Arts had promoted an increase in the average length of stay of tourists visiting the Southern and Northern Tourism Circuits in order to improve the performance of the tourism sector. The audit covered activities and programmes for the periods 2015- 2019 in the Southern and the Northern Circuits of Zambia. The scope of the audit was limited to tourism assets in destination which included Cultural and Natural assets.

I. To what extent have the measures put in place by the Ministry ensured an increase in the length of stay of tourists as well as increase in the number of tourists visiting the Southern and Northern Tourism Circuits?



Length of Stay and Influx on International Tourists

The Auditor General's report showed that the average length of stay for international tourists had reduced. The highest number of days were recorded in 2012 and 2013 when the average length of stay was at six (6) days. **However, this reduced to approximately 4.7 days in 2018. The reduction in length of stay was mainly attributed to the limited tourism products, underdeveloped tourism circuits and tour packages and Zambia being perceived as high cost among others.**



LENGTH OF STAY

6 DAYS

of stay in 2012 and 2013

4.7 DAYS

of stay in 2018

Most of Zambia's tourist attraction are nature based especially within the Northern Circuit, in such cases tourists would only need a few days to explore the attractions hence limiting their stay. **It is therefore imperative that the Ministry of Tourism and Arts put in place incentives to encourage the private sector to upgrade or develop more diversified tourism products and services.**

Tourist destinations across the world have vigorous tour packages. **South Africa for example offers tourists helicopter trips to view the Victoria Falls as part of their tourism package.** Zambia can draw lessons from such initiatives and develop affordable tour packages that would include visits to various tourist sites within both the Southern and Northern Circuits, which will prolong the length of stay of tourists.

Zambia is perceived as a high cost tourist destination, which tends to reduce tourists' length of stay. Most operators in the tourism sector express concern on the licensing and administrative requirements needed to operate in Zambia. While it is critical that the Government provides oversight to ensure that quality and standards are maintained, it remains an area of concern if the cost of compliance is high in monetary terms, which tends to reflect on the consumers' end.

The capacity and reliability of key utilities such as water and electricity remains a concern for most tourism operators in the country. **Some operators continue to face challenges in connecting to the national grid, and most face interruptions in supply caused by load shedding.** Access to treated water remains negligible with most operators incurring the extra costs of sourcing and treating water themselves. These challenges not only constrain further investment in the sector but also prevent established operators from attracting more tourists.

The Auditor General's report highlights 2016 - 2018 as being the years with the least average length of stay, this was during the time in which the country was grappling with load shedding. Private operators needed to find alternative sources of energy which resulted in an increase in the cost of doing business. For as long as such challenges continue to exist, Zambia will remain a high cost destination, hence there is dire need to address factors leading to the high cost of doing business within the tourism sector.



LEAST AVERAGE LENGTH OF STAY

2016 - 2018

Attributed to load shedding



Data Collection Systems for International Tourists and Length of Stay

The Ministry of Tourism and Arts indicated that tourism statistics were not comprehensive due to a non-systematic way of capturing this data. The impact of having a poor data collection system created a challenge to accurately ascertain the number of international tourists that had visited the sites and how long they stayed. Furthermore, it had an impact on the Ministry's planning process.

The Ministry intends to implement the Tourism Satellite Account which will simplify the collection and analysis of tourist arrival data and research through cooperation with immigration and customs authorities and accommodation, employment and earnings with the private sector. PMRC envisions that the effective implementation of this satellite account will improve on the accuracy of data collection and analysis which is key for planning purposes.

The Auditor General's Report, highlights how the discontinued use of the Entry Declaration Form One (1) by the Department of Immigration has negatively affected the Ministry's scope of data collection. **PMRC urges the Department of Immigration to reinstate the Entry Declaration Form One (1) as it would collect critical variables such as sex, purpose of visit of tourists, age and tourist's country of residence, as opposed to the current system that reports data vaguely like nationality instead of country of residence.**



Number of International Tourists Visiting the Northern Circuit in Comparison to the Southern Circuit

In the period under review, the **Northern Circuit reported a total of 3,728 international tourists as compared to 186,884 in the Southern Circuit.** The number of tourists visiting the Northern Circuit was significantly lower as compared to the tourists visiting the Southern Circuit. **The Northern Circuit also recorded a decrease in the number of international tourists visiting the sites from 1,386 tourists in 2017 to 901 tourists in 2018 representing 35% decrease.**



The cause for the low number of tourists visiting the Northern Circuit was due to non-availability of tourism products and inadequate tourism promotion and marketing at the sites, among others. The Northern Circuit tourism is mainly nature based with minimal tourism products. There is need to encourage the private operators within the Northern Circuit to develop tourism products from natural to cultural, experiential, community based, youth, medical tourism, creative, eco-tourism, sport tourism among others.

Zambia's wilderness is characterised by the vastness of unexploited areas, such as the rift valleys of the Luangwa and Zambezi Rivers and their escarpments; mountain highlands, such as the Nyika and Mafinga; vast wetlands in the Bangweulu, Kafue and Zambezi flood plains. The Northern Circuit has vast potential for tourism, all that is needed is investment in infrastructure development as well as massive marketing.

II. To what extent has the Ministry promoted and marketed the tourism circuits to ensure that tourists visiting the country stay for a longer period of time?



Promotion and Marketing Activities Implemented

Although there were a number of promotional and marketing activities undertaken by the Zambia Tourism Agency (ZTA) in the Southern Circuit, it was observed that the promotional activities in the Southern province were skewed towards sites in Livingstone city as compared to sites in Kalomo and Chirundu as most tourist sites in Livingstone city were fully developed.

Livingstone has various promotional activities; the city equally has a variety of tourism products which attracts tourists to the city. Most international and local tourists visit Livingstone because of the Victoria Falls which has put Zambia on the map. **Very little is known about the tourist attractions in Kalomo and Chirundu; the biasness of promoting Livingstone city as compared to other sites in Kalomo and Chirundu makes it impossible to promote knowledge hence reducing the demand for such locations.** There is need for a rigorous promotion and marketing of all sites in both the Northern and Southern Circuits.

It was reported that there were not much improvements in the promotion and marketing of the Victoria Falls as it is perceived as being self- advertised. This perception needs to be addressed as the Victoria Falls is in both Zambia and Zimbabwe which brings about competition. In an event that Zimbabwe extensively markets the Victoria Falls, Zambia will be at a loss.

It was reported that the ZTA had no offices located in the Northern Tourism Circuit. Given that there is need to promote tourism within the Northern Circuit, PMRC recommends that Government increases resource allocation towards the ZTA to enable them have an office within the Northern Circuit, as they play a key role in diversifying tourism in Zambia. It was

reported that the ZTA had a Strategic Plan with a well-articulated marketing strategy, however the achievement of the strategies in place were limited by the low operating budget. **Adequate funding towards the ZTA will not only ensure they have a presence in both the Northern and the Southern Circuits, but will also ensure that they implement their activities effectively as outlined within their strategic plan.**



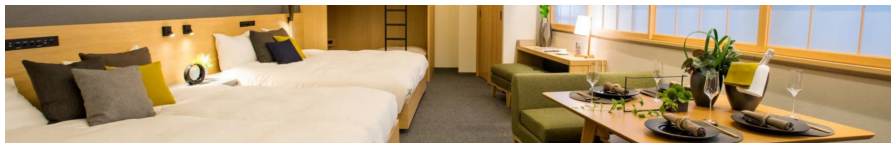
Diversification of Tourism Products

A comparison of tourism products in the Northern and Southern Circuits showed that at the sites visited in the Northern Circuit the sites were only providing nature based tourism such as waterfalls compared to the sites visited in the **Southern Circuit which had an array of activities and products such as natural and cultural heritage sites, diverse culture and traditions, many adventure activities such as white water rafting, bungee jumping, micro-lighting abseiling, game viewing, boat cruising and of late elephant rides and walking with the lions.**

There is need to develop and promote ethno-tourism which showcases Zambia's rich art and culture as well as develop non-traditional modes of tourism, such as green tourism (covering eco and agro-tourism), sports tourism, etc within the Northern Circuit. The Ministry should utilize the **Tourism Development Fund** by promoting and developing non traditional modes of tourism within the Northern Circuit.



III. To what extent has the Ministry facilitated the development of tourism and tourism related infrastructure to and in the tourism priority areas in order to attract more tourists and promote an increase in the length of stay of tourists visiting the sites?



Infrastructure Development in Tourism Sites

It was observed that most sites did not have any infrastructural development in the period under review. Only two (2) heritage sites visited namely the Administrator's House based in Kalomo and Ing'ombe Illede were being renovated under the National Heritage Conservation Commission (NHCC). **However, the renovations were done to the extent that the buildings heritage was being destroyed. It was also observed that the Kalomo site was used as staff accommodation thereby reducing the heritage value of the site.**

Additionally, most of the sites visited **did not have the basic amenities required such as camping areas, restaurants and seating/relaxing areas, ticketing offices and storage space.** In the Northern Circuit, only the Chishimba falls and the Kalambo falls provided basic amenities such as restaurants for tourists to get refreshments once they were done with sight-seeing. Funding was highlighted as a challenge on the rehabilitation of heritage sites. **In 2019, out of K975, 000 Capital Grant, the NHCC did not receive any funding. In 2018, the NHCC received K264, 000 posing a challenge for the Commission to undertake renovations or conservation works of the sites.**

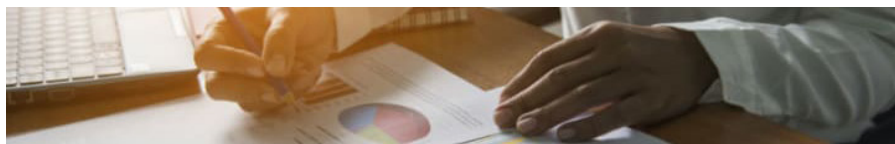
Infrastructure plays an important role in unlocking an area's investment potential. The type of infrastructure necessary for the development of the tourism sector ranges from **energy, roads, water facilities and telecommunication.** Most operators in the sector expressed concern about the state of the road and airport infrastructure. **Having adequate infrastructure of this sort would enhance access to tourism facilities and help ease the movement of tourists from their host countries into Zambia.**

Inaccessibility to tourism sites and poor infrastructure are major hindrances that need urgent attention. Promotion of well targeted Government investment in infrastructure development and opening up of new tourist sites should be priority. Therefore, the Government is urged to consider increasing funding towards the tourism sector aimed at facilitating infrastructure development in order to attract more tourists and investors.

The Report revealed that the Ministry was unable to develop and implement a Tourism Infrastructure Development Plan (TIDP). This was due to lack of an overarching Tourism Development Plan for the country, which would help prioritise tourism development in the circuits.

The main challenges faced by the Ministry with regards to **preparation of the TIDP within the period under review were mainly attributed to challenges with funding and inability to carry out adequate research and development as a result of the delay in the formation of the Tourism Satellite Account.**

Planning is a pre-requisite for development. Developmental plans highlight outcomes and strategies as well as programmes needed to be executed in order to achieve them. It is evident that Zambia's tourism sector lacks adequate infrastructure, therefore it is imperative that the Ministry implements a Tourism Infrastructure Development Plan, as it will provide a roadmap for infrastructure development within the sector.



Monitoring and Evaluation Framework

The report revealed that the Ministry had not developed a monitoring and evaluation framework. This was because the Ministry had been working with the Ministry of National Development Planning (MoNDP) to develop a Government Wide Management Information System- the Management Monitoring System (MMS). The lack of a monitoring and evaluation framework entails that the Ministry does not have a proper system put in place to assess the progress made towards achieving the Ministry's set objectives with regards to infrastructure development.



GOVERNMENT MEASURES TO RESTORING GROWTH AND DIVERSIFYING THE TOURISM (SECTOR?)

The Seventh National Development Plan (7NDP) and the Economic Recovery Programme (ERP) recognises tourism as a key sector of diversifying the economy. Within the Economic Recovery Programme, Government has put in place measures aimed at restoring growth and diversifying the tourism sector. In this regard, the **Government, as an immediate measure, has provided tax incentives and other relief in the 2021 budget in order to sustain the sector.** The tax relief measures and other Government interventions to reinvigorate the tourism sector over the ERP period are as follows:

Measure	Action Required	Lead institution
Tourism Master Plan implementation	■ Enhance the use of social media platforms to market tourism in the country.	Ministry of Tourism and Arts
	■ Establish a conference bureau to promote Meetings, International Conferences and Events (MICE) to be hosted by the country by end of 2021.	
	■ Establish an Eco-Tourism Centre at Mafungausi (confluence of the Zambezi and Kafue Rivers) in Lower Zambezi which will include a cultural centre, accommodation and game viewing facilities.	
	■ Establish an Eco-Tourism Centre at Mambwe Cultural Village in South Luangwa National Park to strengthen leisure/holiday tourism.	
	■ Collaborate with partners to enhance surveillance and security of protected areas through the use of unmanned aerial vehicles to promote conservation of wildlife and prevent encroachment in the Kafue, Mosi-oa-tunya, Lower Zambezi, South Luangwa and Lusaka National Parks.	
	■ Strengthen the brand proposition and slogan for Zambia to increase the country's visibility as a tourism destination of choice.	
	■ Focus marketing initiatives such as road shows, deployment of tourism attachés to Zambian Missions abroad, tourism fairs and conferences to strategic tourism source markets such as Germany, UK and the USA.	
	■ Develop and implement a joint training programme between the Zambia Institute for Tourism and Hospitality Studies (ZITHS) and tourism enterprises so as to enhance service delivery.	

Measure	Action Required	Lead institution
Tax Incentives and other relief for Tourism	<ul style="list-style-type: none"> ■ Reduce Corporate Income Tax rate to 15 percent for a period of one year from 35 percent on income earned by hotels and lodges on accommodation and food services. <p>Suspension of annual license renewal fees paid by hotels and lodges to the Zambia Tourism Agency for an initial period of one year and to be reviewed in line with COVID-19 developments.</p>	Ministry of Tourism and Arts
	<ul style="list-style-type: none"> ■ Suspension of retention fees paid by tourism enterprises and hotel manager registration fees, for a period of one year effective 1st January, 2021. 	
	<ul style="list-style-type: none"> ■ Grant of relief on concession fees for facilities in the National Parks and Game Management Areas. The relief will be up to 50 percent for the year 2020. 	
	<ul style="list-style-type: none"> ■ Grant relief on the 60 percent payment of annual animal quotas to allow Safari operators pay for quotas (animal fees) on an 'as and when' basis; as and when they have tourist arrivals and not payment based on contract targets up to end 2021. 	
	<ul style="list-style-type: none"> ■ Provision of relief for the guaranteed minimum occupancy rate for the facilities in the National Parks to be based on actual occupancy and not the contractual target occupancy rate up to end 2021. This is subject to the Ministry of Tourism and Arts enhancing the verification mechanisms for the reported actual occupancy rate. 	
	<ul style="list-style-type: none"> ■ Suspension of customs duty on the importation of Safari motor vehicles; Game viewing vehicles with a seating capacity of at least 8 people. The customs duty will also be extended to buses and coaches. The relief will be valid for a period of one year effective 1st January 2021. 	
Reinvigorating Livingstone/ Northern Circuit	Livingstone	
	<ul style="list-style-type: none"> ■ Promote Livingstone as a premier centre for Meetings, International Conferences and Events (MICE) in Southern Africa by end 2021. 	Ministry of Tourism and Arts
	<ul style="list-style-type: none"> ■ Rehabilitate Maramba Cultural Village and revise the business model for the centre to operate as a full-fledged ecotourism centre by end 2021. 	

Source: Zambia Economic Recovery Programme, 2020

Measure	Action Required	Lead institution
	<ul style="list-style-type: none"> Relocate the National School of Government to Livingstone (former provincial office) and make it mandatory for civil servants to take courses for continuous professional development as a way of boosting domestic tourism by end 2021. 	Office of the Vice President
	Northern Circuit	
	<ul style="list-style-type: none"> Facilitate the development of Samfya Beach and the surrounding attractions as an anchor tourism attraction through construction of facilities such as a 3-star hotel, international conference centre and shopping mall by 2022. 	Ministry of Tourism and Arts/Workers' Compensation Control Board
	<ul style="list-style-type: none"> Work with tourism operators to develop packages to boost the under explored tourism products in the Northern Circuit by 2021. 	Ministry of Tourism and Arts
Youth Empowerment Scheme for Artists	<ul style="list-style-type: none"> Strengthen Youth empowerment to support tourism product diversification by 2021. 	Ministry of Tourism and Arts
Support to Local Tourism	<ul style="list-style-type: none"> Put in place legislation that will compel the introduction of concessional rates for tourism activities or packages for Zambians by 2022. 	Ministry of Tourism and Arts
	<ul style="list-style-type: none"> Introduce Industrial breaks for public service workers to stimulate demand for local tourism by 2021. 	Cabinet Office

Source: Zambia Economic Recovery Programme, 2020

The first measure put in place is the implementation of the **Tourism Master Plan, the effective implementation of the plan will provide a road map that will facilitate for growth within the sector.** The Tourism Master Plan will also provide an organized and structured framework for tourism development and promotion within the country. That includes things like planning for accommodations, transportation, tourist activities, legislation and regulation, and marketing and promotion. Given that tourism is highly fragmented, consisting of multiple independent industries, the **Tourism Master Plan will unify these disparate industries by developing a singular vision to improve all of them, as well as the city infrastructure. This does not just benefit tourists, but the locals as well.**

Zambia has a number of promotional and marketing activities undertaken by the Zambia Tourism Agency (ZTA) as a way of improving the Country's visibility. However, most of this marketing is for the promotion of the Southern Circuit as opposed to the Northern Circuit. With the **effective implementation of the Tourism Master Plan, it is envisioned that there will be harmonization in the marketing of both circuits.** Government also intends to intensify the tourism marketing strategy by focusing on marketing initiatives such as **road shows, deployment of tourism attachés to Zambian Missions abroad, tourism fairs and conferences**

to strategic tourism source markets such as Germany, UK and the USA. In order to improve local marketing of the sector, **Government will enhance the use of social media platforms, which have proven to be very effective with regards to communication.**

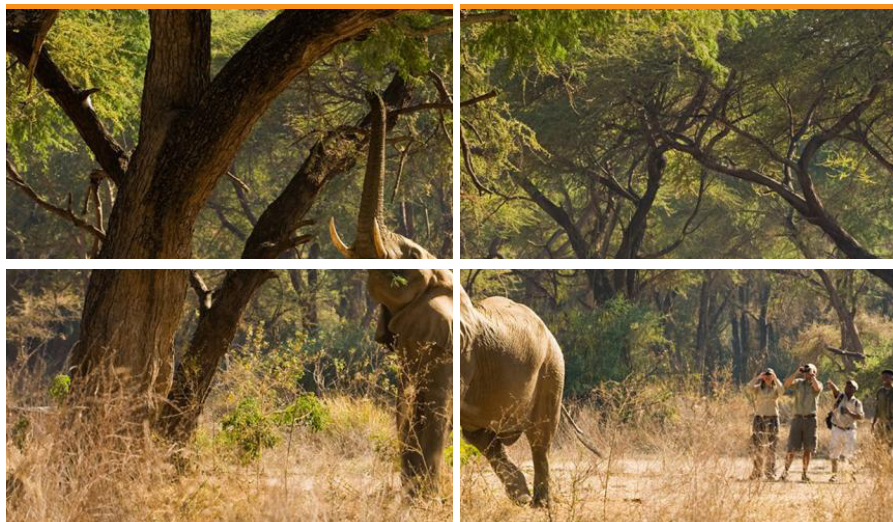
Zambia is perceived as a **high cost tourist destination, which tends to reduce tourists' length of stay.** Most operators in the tourism sector express concern on the licensing and administrative requirements needed to operate in Zambia. Therefore, the second measure put in place by Government includes tax incentives and other relief for Tourism which include;

- I. Reduce **Corporate Income Tax rate to 15%** for a period of one year from 35% on income earned by Hotels and Lodges on accommodation and food services;
- II. Suspension of annual license renewal fees paid by hotels and lodges to the Zambia Tourism Agency for an initial period of one year and to be reviewed in line with COVID -19 developments;
- III. Suspension of retention fees paid by tourism enterprises and hotel manager registration fees, for a period of one year effective 1st January, 2021;
- IV. Grant of relief on concession fees for facilities in the National Parks and Game Management Areas. The relief will be up to 50% for the year 2020; and
- V. Grant relief on the 60% payment of annual animal quotas to allow Safari operators pay for quotas (animal fees) on an '**as and when**' basis; as and when they have tourist arrivals and not payment based on contract targets up to end 2021;
- VI. Provision of relief for the guaranteed minimum occupancy rate for the facilities in the National Parks to be based on actual occupancy and not the contractual target occupancy rate upto end 2021. This is subject to the Ministry of Tourism and Arts enhancing the verification mechanisms for the reported actual occupancy rate.
- VII. Suspension of **customs duty on the importation of Safari motor vehicles;** Game viewing vehicles with a seating capacity of at least 8 people. The customs duty will also be extended to **buses and coaches.** The relief will be valid for a period of one year effective 1st January 2021;

The third measure of restoring growth and diversity within the tourism sector is reinvigorating Livingstone and the Northern Circuit. Government will facilitate the development of Samfya Beach and the surrounding attractions as an anchor tourism attraction through **construction of facilities such as a 3-star hotel, international conference centre and shopping mall by 2022.** The Government will also work with tourism operators to develop packages to boost the under explored tourism products in the Northern Circuit by 2021.

With regards to reinvigorating Livingstone, **Government will promote Livingstone as a premier centre for Meetings, International Conferences and Events (MICE) in Southern Africa, rehabilitate Maramba Cultural Village and revise the business model for the centre to operate as a full-fledged ecotourism centre by end 2021.** In addition, it will relocate the National School of Government to Livingstone (former provincial office) and make it mandatory for civil servants to take courses for continuous professional development as a way of boosting domestic tourism by end 2021. Lastly, **Government will strengthen youth empowerment to support tourism product diversification by putting in place a Youth Empowerment Scheme for Artists as well as provide support to local tourism by putting in place legislation that will compel the introduction of concessional rates for tourism activities or packages for Zambians by 2022.**

TOURISM REFORM RECOMMENDATIONS



Addressing the major and multi-faceted challenges faced by the tourism industry demands an integrated approach to policy development across many Government departments and key players. Coherence and consistency are essential in the design and application of policies between all levels of Government to ensure that policies supporting the tourism sector are effective. **It has been shown that the development and implementation of tourism reforms can play a key role in identifying a vision and direction for tourism development and in setting priorities for implementing a long-term and sustainable vision for the tourism sector (OECD, 2020).** The following are the **Policy Monitoring and Research Centre's reform recommendations which if implemented could improve Zambia's tourism sector:**

I. Review and Upgrade of Tourism Legislation



Legislation review should be undertaken to facilitate the development of a diversified, sustainable and globally competitive tourism industry. **This will promote a quality environment and sustainable utilization of heritage and natural resources.** There lies an opportunity to respond to the changing trends in the tourism business environment and make Zambia a prime destination in Africa. The aim is to have an updated legislation that promotes growth based on increased tourism, which is environmentally sustainable and should be accessible to future generations. For the legislation to be effective, stakeholders (Government and private sector) have to engage in consultative meetings to include and substitute particular elements of the legislation. This should be done with a clear strategic focus on the overall objectives and goals of the tourism sector.

II. Extensive Branding, Marketing and Promotion of Zambia's Tourism



Tourism products, sites and heritage, must be audited and compiled into a data-base. Zambia is endowed with numerous breath-taking tourist attractions but the reality is that it is not attracting the potential tourist numbers. Zambia Tourism Board (ZTB) must target the economic power of the locals as tourists as well. There should be extensive education to the locals on the tourism sites which would increase the network of communication that would help to foster increased tourist arrivals in Zambia. The Private sector must be engaged to enhance the marketing of the sector locally and internationally. Citizens in the diaspora should be engaged to intensify the marketing of Zambia in their country of dwelling. Zambian celebrities could be engaged to brand and market Zambia, as this has been a common trend and a sure way of attracting more tourists. **ZTB should endorse Zambian celebrities and personalities as tourism ambassadors, who would capture a wider audience.**

III. Upgrade of Tourism Infrastructure



Accessibility to tourism sites and poor infrastructure are major hindrances that need urgent attention. Promotion of well targeted Government investments in infrastructure development and opening up new tourist sites should be priority. Collaborations between Government and private sector to introduce economic routes by road and air to viable tourist destinations should be on the reform agenda. Access to tourist attractions should by all means be easy and affordable. A sure way is to promote competition among tour operators and internal airlines. This will ensure that there is no monopoly in transport services and thus the cost and prices of accessing the tourist attractions would be reduced. The end result will be more tourists visiting Zambian sites thereby massively increasing the earnings from the tourism sector.

IV. Uphold and Preserve Our Culture



The tourism sector should not just be seen as a source of revenue from the tourists that come to visit Zambia's tourist sites, instead it should also be seen as a platform for conserving and upholding our rich Zambian culture. The role of heritage in our culture must be upheld as a sense of self and as a way of protecting our identity as Zambians. The **National Heritage Conservation Commission Act of 1990** which provides for the conservation of ancient, cultural and natural heritage must be enforced to carry out its stated aims of which conserving culture is one of them. The Ministry of Tourism and Arts on the other hand must commit its self to supporting the major annual traditional ceremonies that are held in Zambia. **Showcasing of our ceremonies will uplift our culture and this is a viable strategy of attracting tourists to come and experience our traditional ceremonies.** There should also be an introduction of festivals that celebrate rich cultural heritage.

Adopted from the PMRC Tourism and Wealth Series: Unlocking the Potential of the Tourism Sector to Support Economic Diversification and Broad-Based Wealth



RECOMMENDATIONS



As a way of increasing the length of stay of international tourists the Auditor General (AG) highlighted the following recommendations, which the Ministry of Tourism and Arts is urged to put into action. PMRC is in full support of the AG's recommendations and measures to ensure that the AG's recommendations are achieved.

The Auditor General's recommendations	PMRC's recommended measures to ensure that the AG's recommendations are achieved
The Ministry responsible for tourism is encouraged to upgrade or develop more diversified tourism products and services so as to increase the average length of stay of tourists visiting the tourism sites which will increase the earnings needed for national development.	<ul style="list-style-type: none"> ■ The private sector should be encouraged to develop tourism products from natural to cultural, experiential, community based, youth, medical tourism, creative, eco-tourism, sport tourism among others.
There is need for the Ministry to strengthen and prioritize research and development to ensure that they have accurate and up to date data for informed decision making.	<ul style="list-style-type: none"> ■ There is need for the Ministry of Tourism and Arts to effectively operationalize the Tourism Satellite Account which will simplify the collection and analysis of tourist arrival data and research through cooperation with immigration and customs authorities and accommodation, employment and earnings with the private sector.

	<ul style="list-style-type: none"> ■ There is need for the Department of Immigration to reinstate the Entry Declaration Form One (1) as it would collect critical variables such as sex, purpose of visit of tourists, age and tourist's country of residence, as opposed to the current system that reports data vaguely like nationality instead of country of residence. ■ Given resource constraints, there is need for the Ministry of Tourism and Arts to partner with Research institutions that provide accurate, timely and relevant data to conduct research and offer recommendations which will help inform decision making.
<p>The Ministry is urged to undertake more extensive and effective destination marketing to increase awareness and demand. Further, there is need to ensure that the Marketing Strategy is put in place to facilitate effective understanding of the needs of the different niche markets.</p>	<ul style="list-style-type: none"> ■ There is need to make use of the social media to market both the tourist sites and locally produced arts and crafts. The tourism industry can utilize current advances in Information and Communication Technology (ICT), such as virtual reality (VR), web-based technologies, and mobile devices, to engage tourists and gain a competitive advantage. These technologies are capable of influencing tourist decisions on a global scale ■ There should be extensive education to the locals on the tourism sites which would increase the network of communication that would help to foster increased tourist arrivals in Zambia. ■ The Private sector must be engaged to enhance the marketing of the sector locally and internationally. ■ Citizens in the diaspora should be engaged to intensify the marketing of Zambia in their country of dwelling. ■ Zambian celebrities could be engaged to brand and market Zambia, as this has been a common trend and a sure way of attracting more tourists. Additionally, the Ministry can consider endorsing Zambian and foreign celebrities and personalities as tourism ambassadors, who would capture a wider audience. ■ The Ministry of Tourism and Arts in conjunction with the Zambia Tourism Board must compile the country's tourism sector's strengths and weaknesses which will help inform the strategies needed to market Zambia's tourism sites by profiling both the Northern and the Southern Circuits. The Board can also draw lessons from best practices from countries that have a vigorous marketing strategy.

<p>The Ministry needs to strengthen stakeholder and investor coordination and collaboration for enhanced investment into the sector for increased growth.</p>	<ul style="list-style-type: none"> ■ Most operators in the tourism sector express concern on the licensing and administrative requirements needed to operate in Zambia. Therefore, there is need to lessen the regulatory burden faced by operators within the tourism sector such as reducing the number of bodies collecting fees from operators. ■ All stakeholders must be engaged and allowed to contribute into operations at local level.
<p>There is also need for the Ministry to promote tourism-related infrastructure to and in the tourism priority areas so as to enhance accessibility to all sites.</p>	<ul style="list-style-type: none"> ■ Accessibility to tourism sites and poor infrastructure are major hindrances that need urgent attention. Promotion of well targeted Government investment in infrastructure development and opening up new tourist sites should be priority. Therefore, the Government is advised to consider increasing funding towards the tourism sector aimed at facilitating infrastructure development in order to attract more tourists and investors. ■ There is need for collaborations between Government and private sector to introduce economic routes by road and air to viable tourist destinations. ■ Access to tourist attractions should by all means be easy and affordable. A sure way is to promote competition among tour operators and internal airlines. This will ensure that there is no monopoly in transport services thus the cost and prices of accessing the tourist attractions would be reduced.
<p>The Ministry is urged to ensure that the available technical staff receive the required training and tools to conduct their work. Additionally, the Ministry can also engage learning institutions that provide similar courses by offering students internship thereby increasing the number of technical staff.</p>	<ul style="list-style-type: none"> ■ There is need to improve tourism education and training to meet the needs of domestic and international tourists and a growing tourist industry. One measure that can be put in place is the introduction of tourism and hospitality courses at undergraduate and postgraduate institutions. ■ There is need for refresher courses from the Zambia Institute for Tourism and Hospitality to be offered to available technical staff. ■ The Ministry of Tourism and Arts in conjunction with the Ministry of Higher Education can facilitate for sponsorship of technical staff to advance their studies abroad. ■ The Ministry of Tourism and Arts in conjunction with various Embassies can explore possibilities of exchange programs for technical staff members.

CONCLUSION



The tourism sector **possesses significant potential to support economic diversification, broad-based wealth and income generation, but it has not been utilized as a wealth creating and value adding industry.** The findings of the Auditor General's report shows that the measures put in place by the Ministry of Tourism and Arts to ensure that the length of stay of international tourists is increased to six days have not yielded positive results. The report highlighted that the length of stay has been on the decline with the **Ministry of Tourism and Arts having recorded the highest length of stay in 2013 when it was at six days which had reduced to 4.7 days in 2018.** Going forward, it is cardinal that the **Ministry of Tourism and Arts take on the recommendations as highlighted within the Auditor General's report as well as the measures enshrined within the Economic Recovery Programme** as they provide a clear roadmap for restoring growth and diversifying the tourism sector.

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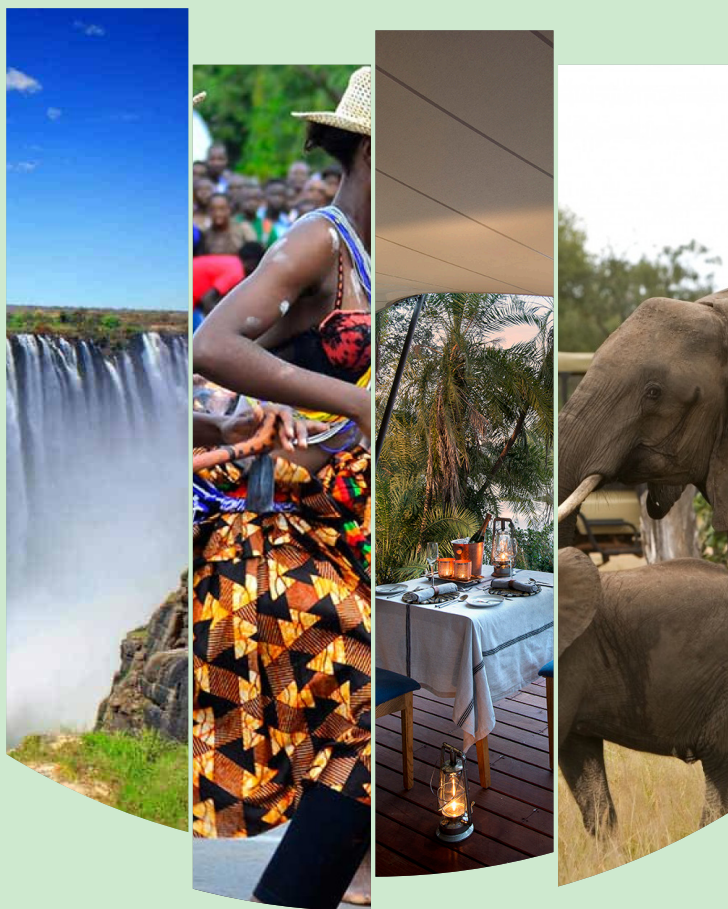
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Unlocking Zambia's Potential

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