

Tourism Demand Assessment - Kafue National Park, Zambia

BRIJESH THAPA, BRIAN CHILD, GREGORY PARENT & PATRICIA MUPETA

The tourism industry is important for Zambia as the government has recently identified tourism as one of the four major priority sectors along with mining, agriculture, and manufacturing. In Zambia, the tourism industry has largely focused on its core products such as parks, wildlife, nature and culture, which are essentially in direct competition with destinations in the eastern and southern Africa region. However, Zambia is an emerging destination with some aspect of novelty and has distinctive tourism resources – unique natural features and landscapes, historical and cultural attractions, and outdoor recreation opportunities. The single most important attraction is Victoria Falls located on the Zambezi River between Zambia and Zimbabwe.



Victoria Falls is the leading attraction for domestic, regional and international visitors, and typically packaged/promoted along with wildlife-based attractions within and/or outside of Zambia. Since park-based tourism is also a major resource and revenue generator, it is critical to disperse visitors to the national parks within Zambia based on product leveraging and bundling with Victoria Falls. Currently, there are 19 national parks, 35 game management areas, and 3



wildlife sanctuaries. The reliance of tourism in parks and protected areas is strategic given the uniqueness and availability of resources, increased demand from visitors, and accrual of local economic benefits in employment, income and quality of life. This priority is evident in Kafue National Park (KNP) which is currently being developed for tourism, conservation and development activities. Visitor dispersal to KNP will provide a diverse mix of tourism opportunities, thereby enhancing the country-wide product, and distribute economic benefits to regional and local economies.

KNP is the oldest and the largest Zambian park (22,480 square km) which stretches over four provinces. KNP is the second largest park in Africa and the fifth largest in the world. This park is fed by Lunga, Lufupa and Kafue rivers, and is home to 400 species of birds and 55 different species of animals including rare species of

wildlife such as red lechwes, a rare marsh antelope, sable and roan. This diversity of antelope attracts numerous predators like leopards, cheetahs and lions. Although the wildlife and natural amenities are major attractions, the current volume of visitors is low compared to its size and slightly skewed toward domestic visitors. Factors such as lack of quality infrastructure including physical (e.g., roads) and tourism (e.g., visitor services) likely limits major growth in arrivals. Although growth has been demonstrated with respect to arrivals, the park has the capacity to sustain additional visitors. However, in order to further develop, package and promote KNP and its surrounding region, it is important to first assess the viability of tourism growth from supply and demand perspectives. Currently, tourism has not reached its potential but is a major tool to promote and strengthen sustained economic growth and poverty reduction in the



greater KNP area.

This study examined demand based on current visitors that have visited the KNP area and/or those that have visited other national parks. This study is part of a larger project that aims to diversify and strengthen Zambia's tourism product and to alleviate poverty and accrue economic benefits in the greater KNP area. The overall project is based on a triangulation of assessment of demand (visitors), supply (accommodations, tour operators, etc.), and the surrounding communities in the game management areas that are adjacent to KNP. This study was specifically focused on visitor demand, and an assessment was conducted for the greater KNP area based on current visitors (international, regional and domestic tourists - 2,395 tourists interviewed) that have visited the KNP area and/or those that have visited other national parks in Zambia and neighboring Botswana (e.g. Chobe National Park). There were two major aspects to this study. The first component related to market research based on visitor demo-

graphics, travel behaviors, quality of experience, level of satisfaction, and perceptions of national parks. In addition, information about frequency of use level, quality of experience, and satisfaction with KNP was also solicited. The second component focused on trip expenditures, and the estimation of demand change for KNP (willingness to pay/willingness to stay) in response to three major potential improvement projects (i.e. road networks, visitor facilities and services, and natural resources and amenities) in and around KNP.

Overall, this study provided baseline information needed to position KNP relative to other areas within the country and the southern Africa region. The study also analyzed determinants of demand to aid policy makers as well as the tourism industry to identify potential new markets and products, and provide opportunities that play a key role in a tourists' choice in their trip selection. Additionally, it assisted in the development of comprehensive marketing strategies for the greater KNP region and Zambia.

Brijesh Thapa is the Director of Eric Friedheim Tourism Institute [www.uftourism.org] and an associate professor in the Department of Tourism, Recreation & Sport Management. The project is managed through U.S. Department of Agriculture-Foreign Agricultural Service with funding (\$193,262) from the U.S. Millennium Challenge Corporation, Washington, D.C.