

**A STUDY OF THE EFFECT OF COVID 19 ON THE PERFORMANCE OF  
ZAMBIA'S HOSPITALITY INDUSTRY**

**BY**

**OLIVIA M'HANGO**

**A Dissertation submitted to the University of Zambia in partial fulfilment of the  
requirements for the award of the Degree of Master of Business Administration General**

**THE UNIVERSITY OF ZAMBIA**

**LUSAKA**

**2024**

## DECLARATION

I, **OLIVIA M'HANGO**, do hereby declare that this work is my original work achieved through personal reading and research. This work has never been submitted to the University of Zambia or any other Universities. All sources of data used and literature on related works previously done by others, used in the production of this Dissertation have been duly acknowledged. If any omission has been made, it is not by choice but by error.

Signature: .....

Date: .....

## **COPYRIGHT**

All rights reserved. No parts of this Dissertation may be reproduced, stored in any retrieval system or transmitted in any form or by any means: electronic, mechanical, photocopying, recording or otherwise without the consent of either the author or the University of Zambia.

(c) Olivia M'hango, 2024

## APPROVAL

This Dissertation by Olivia M’hango is approved as a partial fulfilment of the requirements for the award of the Degree of. *Master of Business Administration General*.

Examiner 1	Signature	Date
.....	.....	.....

Examiner 2	Signature	Date
.....	.....	.....

Examiner 3	Signature	Date
.....	.....	.....

Chairperson Board of Examiners	Signature	Date
.....	.....	.....

Supervisor	Signature	Date
.....	.....	.....

## ABSTRACT

This study examined the effects of the COVID-19 pandemic on the performance of Zambia's hospitality industry, focusing on the years 2015 to 2022. Initially, the research aimed to understand the industry's trajectory through its pre-pandemic growth and diversification, followed by its response to the pandemic's challenges. Utilizing a mixed-method approach, the investigation combined quantitative data from Zambia's Tourism Statistical Digests with qualitative insights from interviews conducted with officials in the Ministry of Tourism and Arts. This approach enabled a comprehensive analysis of trends in tourist arrivals, occupancy rates, revenues, and employment within the hospitality sector. The findings revealed that the period from 2015 to 2019 was marked by significant growth in the industry. For instance, international tourist arrivals rose from 931,782 in 2015 to 1,009,173 in 2017, accompanied by an increase in tourism revenue. However, the emergence of COVID-19 in 2020 led to a dramatic downturn, highlighted by a 56.2% decline in international tourist arrivals compared to the previous year. In response to the pandemic, the Zambian government issued several Statutory Instruments, such as the Tourism and Hospitality (Licensing) (Amendment) Regulations, 2020 and the Tourism and Hospitality (Registration of Hotel Managers) (Temporary Disapplication of Registration Fee) Regulations, 2020. These were aimed at providing financial relief and maintaining regulatory compliance within the industry. By 2022, the industry began showing recovery signs, including a 10.5% increase in tourist arrivals from 2020 to 2021. The resilience of Zambia's hospitality industry in the face of the pandemic was evident. The study concludes with strategic recommendations for future growth, highlighting the importance of Public-Private Partnership models to enhance infrastructure and service quality. It also emphasizes the need for Market Diversification and Niche Tourism Development, focusing on promoting less explored destinations like Lake Bangweulu and traditional ceremonies such as the Kuomboka ceremony, to broaden the industry's appeal and resilience.

**Key words:** COVID-19, Tourism, Public-Private Partnerships, Market Diversification, Performance Hospitality.

## **ACKNOWLEDGEMENTS**

I would like to express my sincere gratitude to my supervisor, Dr. Bupe G Mwanza, for her invaluable guidance, feedback, and support throughout this research project. Her insights and direction were crucial in the completion of this dissertation.

I would also like to thank the management and staff at the Ministry of Tourism and Arts (MoTA) who took time from their busy schedules to participate in my interviews. This research would not have been possible without their contributions.

In addition, I wish to acknowledge my late father Oliver M'hango and my mother Renny Mulenga for their endless love, encouragement, and prayers. I would not be where I am today without them.

Finally, I am thankful for my family and friends, especially David Ngandwe, who provided moral support during both the highs and lows of my academic journey. This accomplishment would not have been realized without them cheering me on.

## **DEDICATION**

This Dissertation is dedicated to the loving memory of my late father, Mr. Oliver M'hango. His guidance, wisdom, and unwavering support have been my inspiration and strength. May his legacy continue to light my path and those of others he touched.

## TABLE OF CONTENTS

<b>DECLARATION</b> .....	<b>I</b>
<b>COPYRIGHT</b> .....	<b>II</b>
<b>APPROVAL</b> .....	<b>III</b>
<b>ABSTRACT</b> .....	<b>IV</b>
<b>ACKNOWLEDGEMENTS</b> .....	<b>V</b>
<b>DEDICATION</b> .....	<b>VI</b>
<b>LIST OF TABLES</b> .....	<b>XI</b>
<b>LIST OF FIGURES</b> .....	<b>XII</b>
<b>LIST OF ACRONYMS</b> .....	<b>XIII</b>
<b>CHAPTER 1</b> .....	<b>1</b>
<b>INTRODUCTION</b> .....	<b>1</b>
1.0 Introduction.....	1
1.1 Background of the Study .....	2
1.2 Statement of the Problem.....	3
1.3 Research Aim.....	4
1.4 Specific Objectives .....	4
1.5 Research question .....	4
1.6 Significance of the Study .....	5
1.7 Scope of Study .....	5
1.8 Outline of the Dissertation .....	6
<b>CHAPTER 2</b> .....	<b>7</b>
<b>LITERATURE REVIEW</b> .....	<b>7</b>
2.0 Introduction.....	7
2.1 Overview of the global hospitality industry.....	7
2.1.1 Performance Measurement in the Hospitality Industry .....	8

2.1.2 Performance of the Hospitality Industry before Covid-19 .....	8
2.1.3 Performance of the Hospitality Industry during Covid-19 .....	10
2.1.4 Strategies for Improving Performance in the Hospitality Industry.....	11
2.2 The Zambian Hospitality Industry and the Impact of COVID-19.....	13
2.3 Challenges Faced by the Hospitality Industry During the COVID-19 Pandemic .....	14
2.4 Crisis Management in the Hospitality Industry .....	15
2.5 Resilience and Recovery in the Hospitality Industry.....	16
2.6 Lessons Learnt from the Review Literature.....	16
<b>CHAPTER 3 .....</b>	<b>18</b>
<b>THEORETICAL AND CONCEPTUAL FRAMEWORK .....</b>	<b>18</b>
3.1 Introduction.....	18
3.1 Theoretical Framework.....	18
3.2 Conceptual Framework.....	21
3.2.1 Development of the Conceptual Framework .....	21
3.2.2 Independent Variable:.....	21
3.2.3 Dependent Variables.....	22
3.2.4 Mediating Factors .....	22
3.2.5 Relationships Between Elements.....	23
3.2.6 Application of the Conceptual Framework.....	24
3.3 Conclusion .....	24
<b>CHAPTER 4 .....</b>	<b>26</b>
<b>RESEARCH METHODOLOGY .....</b>	<b>26</b>
4.0 Introduction.....	26
4.2 Research Design.....	27
4.3 Study Site.....	27
4.4 Sample Size.....	27
4.5 Sampling Techniques.....	28

4.6 Data Collection Procedures and Instruments .....	29
4.7 Data Analysis .....	30
4.8 Ethical Considerations .....	31
4.9 Conclusion .....	31
<b>CHAPTER 5 .....</b>	<b>32</b>
<b>RESULTS AND PRESENTATION OF THE FINDINGS .....</b>	<b>32</b>
5.1 Introduction.....	32
5.2 Demographic Information.....	32
5.3 Performance of the Hospitality Industry in Zambia (2015-2019) .....	33
5.3.1 Respondents .....	33
5.3.2 Analysis of Tourism Statistical Digests .....	34
5.3.3 Synthesis of the findings.....	38
5.4 Performance of the Hospitality Industry in Zambia (2020-2022) .....	40
5.4.1 Respondents .....	40
5.4.2 Analysis of Tourism Statistical Digests .....	42
5.4.3 Synthesis of the findings.....	43
5.5 Analysis of Response Strategies to COVID-19.....	44
5.5.1 Respondents .....	44
5.5.2 Analysis of Government Statutory Instruments.....	46
5.5.3 Synthesis of the findings .....	47
5.6 Summary of Key Findings .....	48
5.8 Conclusion .....	51
<b>CHAPTER 6.....</b>	<b>52</b>
<b>DISCUSSION OF THE FINDINGS.....</b>	<b>52</b>
6.1 Introduction.....	52
6.2 Assessing Performance of the Hospitality Industry in Zambia (2015-2019) .....	52
6.3 Assessing Performance of the Hospitality Industry in Zambia (2020-2022) .....	53

6.4 Analysis and Evaluation of Response Strategies .....	54
6.5 Conclusion .....	56
<b>CHAPTER 7 .....</b>	<b>57</b>
<b>CONCLUSION AND RECOMMENDATIONS.....</b>	<b>57</b>
7.1 Introduction.....	57
7.2 Conclusion .....	57
7.3 Recommendations.....	58
<b>REFERENCES.....</b>	<b>60</b>
<b>APPENDICES .....</b>	<b>64</b>
Appendix I: Interview Questions Guide .....	64

## LIST OF TABLES

Table 5.1: Demographic Information of MoTA Respondents .....	32
Table 5.2: Key Themes Identified from Interview Responses .....	33
Table 5.3: Performance Indicators of Zambia's Hospitality Industry (2015-2017).....	35
Table 5.4: Consolidated Findings from Interviews and Statistical Analysis.....	39
Table 5.5: Thematic Analysis of the Performance of the Hospitality Industry in Zambia (2020-2022) .....	41
Table 5.6: Performance Indicators of Zambia's Hospitality Industry (2020-2022).....	42
Table 5.7: Consolidated Findings from Interviews and Statistical Analysis (2020-2022).....	43
Table 5.8: Thematic Analysis of Government Response Measures to COVID-19 in Zambia's Hospitality Industry .....	45
Table 5.9: Analysis of 2020 Government Statutory Instruments in Zambia's Hospitality Sector .....	46
Table 5.10: Consolidated Findings from Interviews and Government Statutory Instruments Analysis (2020-2022).....	47
Table 5.11: Summary of Key Findings.....	49

## LIST OF FIGURES

Figure 3.1: Conceptual Framework of COVID-19 Impact on Zambia's Tourism Sector.....	24
Figure 5.1: Trend Analysis of Zambia's Hospitality Industry (2015-2017) .....	36
Figure 5.2: Tourist Visits to Major Sites in Zambia (2015-2017) .....	37
Figure 5.3: Average Tourist Purpose Distribution in Zambia (2015-2017) .....	38
Figure 5.4: Time Series Analysis (2015-2022).....	50

## **LIST OF ACRONYMS**

ADR - Average Daily Rate

CAGR - Compound Annual Growth Rate

CMT - Crisis Management Theory

COVID-19 - Coronavirus Disease 2019

ETAZ - Economic Tourism Association of Zambia

GDP - Gross Domestic Product

IATA - International Air Transport Association

KPIs - Key Performance Indicators

LDCs - Least Developed Countries

MoTA - Ministry of Tourism and Arts

PPE - Personal Protective Equipment

PMRC - Policy Monitoring and Research Centre

RevPAR - Revenue per Available Room

STR - Smith Travel Research

UNWTO - United Nations World Tourism Organization

WTTC - World Travel & Tourism Council

ZTA - Zambia Tourism Agency

# CHAPTER 1

## INTRODUCTION

### 1.0 Introduction

This research is aimed at examining the impact of COVID-19 on the hospitality industry in Zambia. The hospitality industry is very diverse and includes restaurants and cafes in addition to hotels and lodging (Pascual and Cain, 2021). The hospitality industry represents a broad subcategory within the service industry that includes but is not limited to food and beverages, travel and tourism, lodging, and recreation services (Arikan, 2022). It is focused on the satisfaction of customers and providing specific experiences for them. The hospitality industry is unique because it relies so heavily on discretionary income and free time. Past occurrences have revealed that infectious diseases and pandemics can have a significant adverse economic impact on the hospitality and tourism industries, and international public health concerns have become an important element affecting tourism flows. In particular, the hospitality and tourism industries are extremely susceptible to global health pandemics, which can rise rapidly without warning (Santana, 2004). Albattat & Som (2015) argue that global pandemics often directly affect the stability of the hospitality and tourism sectors and given that employees and guests are an inseparable part of the hospitality product, these hazards affect the organization (Jones et al., 2008). Thus, as observed by Albattat & Som (2015), it is imperative to examine the impact of COVID-19 on the hospitality industry given its susceptibility to adverse impacts arising from global pandemics.

The goal of this chapter was to provide a comprehensive background and introduction to the study. The background in Section 1.1 provides an overview of the impact of COVID-19 on the hospitality industry globally and in Zambia. Section 1.2 identifies the research problem. Section 1.3 provides the aim of the study. Section 1.4 lists the research objectives. Section 1.5 lists the research questions in line with the specific objectives. Section 1.6 presents the significance of the study. Section 1.7 presents the scope of the study. Section 1.8 outlines the structure of the dissertation.

## **1.1 Background of the Study**

The hospitality industry, a crucial segment of the global economy, has witnessed dramatic shifts due to the COVID-19 pandemic. Prior to the pandemic, the industry was characterized by steady growth, bolstered by increasing domestic and international tourism and improving economic conditions (Brouder et al., 2020). The sector's resilience and adaptive nature were proven during previous crises (Sigala, 2020). However, the unprecedented global reach and impact of COVID-19 have presented new and considerable challenges (Gursoy et al., 2020). From 2000 to 2019, Zambia's hospitality industry experienced remarkable progress. According to a World Bank report (2019), the country's burgeoning tourism sector contributed approximately 7% of the GDP and 7.2% of total employment in 2019. Additionally, international visitors spent USD 848 million, representing 10% of Zambia's exports. This progress highlights the importance of the hospitality industry in Zambia's economic fabric. Key players in this industry, such as the Hilton Garden Inn, leveraged this climate, honing their services and expanding their customer base (World Bank, 2019).

On a global scale, the hospitality industry was experiencing a similar upward trajectory. However, the advent of the COVID-19 pandemic in late 2019 led to a profound disruption in this growth trend. The virus rapidly spread across continents, leading to stringent travel restrictions and a near-complete halt of tourism in many regions (Sigala, 2020). Globally, hotels faced historically low occupancy rates, and many were forced to close their doors indefinitely (Gursoy et al., 2020). As per Statista (2021), the travel and tourism sector lost an estimated 100.8 million jobs worldwide by the end of 2020, the most significant decrease ever recorded in the industry. Africa was not spared from this downturn. According to the International Air Transport Association (IATA, 2020), African airlines faced a revenue loss of up to US\$4.4 billion by March 2020.

In Zambia, the effects of the pandemic were felt heavily across various sectors of the local economy, including the hospitality industry. Prudence (2020) reported that the Ministry of Tourism and Arts stated that the hospitality industry had lost over US\$ 6 million due to canceled hotel bookings and paybacks to tourists. Some hotels in Lusaka, such as Taj Pamodzi and Golden Peacock, had to close down, which further resulted in many workers being sent on forced leave (Prudence, 2020). Furthermore, the International Growth Centre (2020) indicated that despite Zambia not closing its borders, the number of international visitors declined sharply. The first three months of 2020 saw a decrease of over 141,000 national visitors. The

Economic Tourism Association of Zambia (ETAZ) suggested that Zambia's safari tourism and allied sectors such as airline charter services would face a loss in income of US\$ 100 million in 2020 (International Growth Centre, 2020). Over 7,000 jobs were projected to be lost, and 165 tourism businesses in Livingstone and Zambia's protected areas faced potential bankruptcy.

The COVID-19 pandemic has had a significant impact on Zambia's hospitality industry and has underlined the need for robust, well-informed strategies to navigate and recover from such crises. A critical examination of the pandemic's impacts and potential strategies for resilience is vital. This study aims to fill this research gap by focusing on the impact of COVID-19 on Zambia's hospitality industry and identifying strategic directions for the sector's recovery.

## **1.2 Statement of the Problem**

The COVID-19 pandemic has had a substantial impact on Zambia's hospitality sector. The country, although having kept its borders open, saw a sharp drop in international visitor arrivals, with a 56.3% decrease in the first half of 2020 compared to 2019 (PMRC, 2020). The Eco-Tourism Association of Zambia (ETAZ, 2020) anticipated a substantial loss in income, to the tune of USD 100 million, within safari tourism and related sectors. Over 7,000 jobs were at risk, with 165 tourism businesses in protected areas, including Livingstone, potentially facing bankruptcy (Tabetando, 2020). These statistics underscore the severity and broad-reaching impacts of the COVID-19 pandemic on Zambia's hospitality industry.

Understanding these impacts and formulating appropriate responses is critical. Failure to conduct a detailed study on this crisis could result in further deterioration of the industry, exacerbating unemployment, reducing government revenues, and decimating businesses that depend on the sector (Sigala, 2020). Long-term impacts may also include a weakened national economy and a long, slow path to recovery for the hospitality industry (Brouder et al., 2020).

Despite the clear need for research in this area, there exists a gap in the current body of knowledge. Numerous studies have investigated the impacts of COVID-19 on global tourism (Qiu et al., 2021; Zhang et al., 2021), but they are often overly broad or focused on developed countries (Fu, 2020; Gössling et al., 2020; Hall et al., 2020; Higgins-Desbiolles, 2020; Jafari et al., 2020; Karabulut et al., 2020; Qiu et al., 2020; Foo et al., 2020; Zhang et al., 2021). There is a notable lack of research pertaining to Least Developed Countries (LDCs), like Zambia, and specifically, in-depth studies examining the effects on their hospitality industry. This study

aims to address this gap, contributing valuable insights to aid in strategic planning and recovery for the Zambian hospitality industry amidst the challenges of the COVID-19 pandemic.

### **1.3 Research Aim**

The aim of this research was to investigate the effect of COVID-19 on the performance of the hospitality industry in Zambia.

### **1.4 Specific Objectives**

To achieve the research aim, the following specific objectives were identified:

1. To analyse the effect of COVID-19 on key performance indicators of Zambia's hospitality industry, such as tourist arrivals, occupancy rates, and revenue, by comparing pre-pandemic (2015-2019) and pandemic (2020-2022) periods.
2. To examine the impact of COVID-19 on operational aspects of Zambia's hospitality industry, including employment and service delivery, during the pandemic period (2020-2022).
3. To evaluate the effectiveness of response strategies implemented by the hospitality industry and government to mitigate the impact of COVID-19 on the sector's performance during the pandemic period (2020-2022).

### **1.5 Research question**

To address the research objectives, the following research questions were formulated:

1. How did the COVID-19 pandemic specifically alter key performance indicators (tourist arrivals, occupancy rates, and revenue) within Zambia's hospitality industry when comparing pre-pandemic (2015-2019) and pandemic (2020-2022) data?
2. To what extent did COVID-19 disrupt employment levels and modes of service delivery within Zambia's hospitality industry during the pandemic period (2020-2022)?
3. What was the relative success of response strategies used by Zambia's hospitality industry and government in mitigating the negative effects of COVID-19, and what factors influenced their effectiveness?

## **1.6 Significance of the Study**

This study aimed to examine the impact of COVID-19 on the hospitality industry in Zambia. During the period 2019–2022, Zambia experienced a severe COVID-19 crisis, resulting in the closure of businesses, including those operating in the hospitality industry. This study therefore, highlighted the impact of the COVID-19 pandemic on the Zambian hospitality industry. The findings of the study have the potential to help in obtaining a broader understanding of and information on the impact of COVID-19 on business trading in the said industry. This information is useful in assisting policymakers in the formulation of adequate policies to assist businesses in mitigating the impacts of pandemics such as COVID-19. Further, the findings of the study could assist businesses in coming up with effective ways to respond to crises such as COVID-19 by putting in place crisis management responses and measures to mitigate negative impacts.

Additionally, the outbreak of the COVID-19 pandemic was recent; that is, the same occurred in late 2019 or early 2022; thus, not much literature can be sourced in the Zambia context. Therefore, it is envisaged that the outcome of this study has contributed to the body of knowledge by highlighting the impact of COVID-19 on the hospitality industry in Zambia. Further, the study has contributed to the literature pool by recommending the measures that may be adopted to control, mitigate, and assist players in the hospitality industry to effectively manage the COVID-19 pandemic as well as other pandemics that may impact the industry in the future.

## **1.7 Scope of Study**

The scope of this research focused on the performance and changes experienced in the hospitality industry in Zambia from 2015 to the present year, 2023. This period included the years before the onset of the COVID-19 pandemic (2015-2019), the years during the COVID-19 pandemic (2020-2022), and the year 2023 which will provide insight into the recovery and adjustment phase in the industry. Geographically, the study was concentrated in Lusaka, the capital city of Zambia. Lusaka hosts numerous hospitality establishments. The choice of Lusaka was strategic due to its significance as a major hub for both domestic and international travelers, thereby making it an essential focal point for assessing the impact of COVID-19 on the hospitality industry. In terms of the participants, the study involved stakeholders in the hospitality industry in Lusaka. This includes representatives from the ministry of Tourism and Arts (MoTA).

## **1.8 Outline of the Dissertation**

This dissertation consists of six chapters, and the introduction is presented in this chapter.

Chapter two is a literature review. It gives a detailed literature review that aims at appreciating the works of prior researchers on the subject, identifying gaps, and contributing to the body of knowledge. Chapter 3 presented the theoretical and conceptual framework underpinning the study. Chapter four is about research methodology. It narrated the research philosophy and techniques used to arrive at the research outcome. The research design used in this study was discussed in this chapter. It also discusses the techniques used to arrive at the population of participants. Sampling techniques and estimation of sample size will be elaborated on. Techniques used to collect and analyse the data will also be presented. Furthermore, validity and reliability tests, limitations, and ethical considerations were presented. Chapter five presented data analysis and the presentation of results. It dealt with in-depth data analysis, interpretation, and results. Chapter six carried on from Chapter five to present a discussion of findings. Finally, chapter seven provided conclusions and recommendations.

## **CHAPTER 2**

### **LITERATURE REVIEW**

#### **2.0 Introduction**

This chapter provided an overview of the existing literature relevant to the impact of COVID-19 on the hospitality industry, with a specific focus on Zambia. The literature review aimed to establish a theoretical framework for understanding the effects of the pandemic on the hospitality sector and to identify gaps in the existing research that this study seeks to address. The chapter is organized into sections presented.

#### **2.1 Overview of the global hospitality industry**

The global hospitality industry, encompassing a vast array of services including accommodation, food and beverage, events, tourism, and travel services, is an engine of the global economy. The industry, spread across diverse sectors such as hotels, restaurants, airlines, travel agencies, and cruise ships, has been a cornerstone of economic growth, contributing a significant share to the Gross Domestic Product (GDP) of many countries, and providing millions with employment opportunities (Sigala, 2020). According to the World Travel & Tourism Council (WTTC), the sector generated \$8.9 trillion to the global economy in 2019, equivalent to 10.3% of global GDP, and was responsible for creating one in four of the world's new jobs (WTTC, 2020). In 2019, the United Nations World Tourism Organization (UNWTO) reported international tourist arrivals reaching a remarkable figure of 1.5 billion, reflecting a 4% increase from the previous year and demonstrating the unwavering growth and importance of the hospitality and tourism sectors (UNWTO, 2019). The growth in tourist arrivals was spurred by a variety of factors such as increased global wealth, improved air connectivity, more efficient visa facilitation, and the growth of the middle class in emerging markets (Bieger et al., 2016). The robust growth and the globalized nature of the hospitality industry have not only contributed to economic development but also led to socio-cultural changes, fostering understanding among diverse cultures, and playing a key role in sustainable development initiatives. Furthermore, the industry's integration with digital technology has brought innovative changes to services and customer experiences, with online booking platforms, digital payments, and customer service robots becoming ubiquitous (Ivanov & Webster, 2017).

### ***2.1.1 Performance Measurement in the Hospitality Industry***

In the hospitality industry, performance measurement is critical to understand and manage the operations effectively. It serves as a mechanism to gauge the efficiency and effectiveness of the hospitality operations, guiding strategic decision-making and facilitating improvements (Phillips & Louvieris, 2005). Traditional performance metrics in the hospitality industry mainly focus on financial and operational measures. Financial performance indicators include revenue, profit margin, return on investment, and revenue per available room (RevPAR), a key indicator in the hotel industry that combines the occupancy rate and the average daily room rate (ADR). Operational performance measures encompass occupancy rate, average length of stay, customer satisfaction, and market share (Phillips, 2007). In addition to these traditional measures, the hospitality industry has recognized the importance of customer-centric performance measures. These include customer satisfaction, loyalty, and perceived value, which are considered vital for the long-term success of hospitality businesses in an increasingly competitive environment (Kapiki, 2012). The rise of online review platforms and social media has made customer feedback an essential part of performance measurement, influencing other customers' decision-making processes (Sigala, 2020). Moreover, in line with the global trend toward sustainability, environmental and social performance measures are gaining attention in the hospitality industry. These encompass energy use, water consumption, waste management, community engagement, and employee satisfaction, reflecting the industry's shift toward a more sustainable and responsible business model (Jones et al., 2016). In recent years, the unprecedented outbreak of COVID-19 has necessitated new performance measures related to health and safety, such as hygiene standards, sanitation procedures, and implementation of social distancing measures, which have become crucial determinants of customer choice and satisfaction in the current hospitality environment (Gursoy et al., 2020).

### ***2.1.2 Performance of the Hospitality Industry before Covid-19***

Before the onslaught of the Covid-19 pandemic, the global hospitality industry was thriving, with growth trajectories indicating a promising future. The performance of the hospitality industry had been consistently strong for several years, characterized by increasing tourist arrivals, expanding revenue, escalating employment opportunities, and significant contributions to global GDP. Tourist arrivals were a significant indicator of the sector's performance. The UNWTO (2019) reported that international tourist arrivals grew from 1.1 billion in 2014 to 1.5 billion in 2019, representing a robust growth rate of about 6.5% annually.

This growth was spurred by various factors, including improved travel accessibility, the rise of the middle class in emerging economies, and digital innovations that transformed the way consumers planned and experienced travel (Bieger et al., 2016). Financially, the industry also posted impressive figures. According to WTTC (2020), the sector's direct contribution to global GDP increased from \$2.3 trillion in 2014 to nearly \$2.9 trillion in 2019, demonstrating a compound annual growth rate (CAGR) of approximately 4.8%. Moreover, the total contribution (including the wider effects from investment, supply chain, and induced income impacts) of the travel and tourism sector accounted for \$8.9 trillion in 2019, or 10.3% of global GDP (WTTC, 2020). On the employment front, the hospitality industry was a leading job creator worldwide. The WTTC (2020) reported that the industry directly provided nearly 330 million jobs in 2019, representing one in ten jobs globally. Indirectly, the industry's effect on job creation was even more profound when considering the interconnectedness of the hospitality sector with other industries such as agriculture, construction, retail, and transportation.

In terms of performance metrics, the hotel sector, a significant component of the hospitality industry, witnessed positive trends. Occupancy rates, Average Daily Rate (ADR), and Revenue per Available Room (RevPAR) - the key performance indicators (KPIs) in the hotel industry - showed an upward trajectory in most regions globally (STR, 2020). Specifically, global hotel occupancy rates rose from 65.6% in 2014 to 66.2% in 2019. Similarly, the global ADR improved from \$121.67 in 2014 to \$130.01 in 2019, leading to an increase in RevPAR from \$79.74 in 2014 to \$86.06 in 2019 (STR, 2020).

Beyond hotels, other sectors within the hospitality industry, including restaurants, airlines, and cruise lines, were also performing robustly. The airline industry, for instance, recorded a total of 4.5 billion passengers in 2019, up by 4.2% from the previous year (IATA, 2020). The restaurant industry was expected to generate over \$900 billion in sales in the US alone in 2020 (National Restaurant Association, 2020). Cruise lines, though a smaller sector within the industry, were growing faster than ever, with passenger numbers expected to reach 32 million in 2020, up from 17.8 million a decade earlier (Cruise Lines International Association, 2020). Moreover, digital technology and innovation played an increasing role in the industry's performance. Advancements in mobile technology, artificial intelligence, and data analytics significantly transformed the hospitality landscape, enabling personalized services, improving operational efficiency, and enhancing customer experience (Sigala, 2020). These innovations

contributed to the industry's strong performance by driving consumer demand and streamlining business operations.

### ***2.1.3 Performance of the Hospitality Industry during Covid-19***

The global outbreak of Covid-19 in early 2020 sent shockwaves throughout the global economy, and the hospitality industry was among the sectors hit hardest. The pandemic, characterized by widespread infection rates and resulting in global travel restrictions, lockdowns, and fear among consumers, significantly disrupted the hospitality industry's operations and drastically impacted its performance. Travel restrictions and lockdown measures imposed to curtail the spread of the virus led to a sharp decline in international tourist arrivals. According to UNWTO (2020), international arrivals fell by 73% in 2020, the worst year in tourism history, with a loss of about 1 billion international arrivals. The decrease in tourist arrivals was widespread, affecting all regions across the globe, with Asia and the Pacific, the first region to suffer from the impact of the pandemic, seeing the most significant decline of 84% in arrivals. In financial terms, the downturn in tourism translated into a loss of \$1.3 trillion in export revenues, more than eleven times the loss recorded during the 2009 global economic crisis (UNWTO, 2020). The WTTC (2021) estimated that the travel and tourism sector's contribution to global GDP dropped from \$8.9 trillion (10.3% of GDP) in 2019 to \$4.7 trillion (5.5% of GDP) in 2020, a decrease of 49.1%.

The hospitality industry's performance in terms of employment was equally troubling. The WTTC (2021) reported that the sector suffered a job loss of 62 million in 2020, a decrease of 18.5% compared to 2019. This drop in employment affected all regions, with the Americas being the most impacted due to its heavy reliance on the sector. With respect to hotels, key performance indicators took a significant hit in 2020. STR (2021) reported that the global hotel occupancy rate dropped to 37.1%, ADR fell to \$96.97, and RevPAR plummeted to \$35.97. The decline in these metrics was largely driven by reduced travel demand, stay-at-home orders, and the suspension of non-essential travel in many parts of the world. The pandemic also significantly impacted other sectors within the hospitality industry, including restaurants, airlines, and cruise lines. The International Air Transport Association (IATA, 2021) reported that the airline industry faced a net loss of \$118.5 billion in 2020. The global restaurant industry also grappled with closures and reduced capacity, resulting in an estimated revenue decline of 30% in 2020 (Statista, 2021). As for the cruise industry, virtually all sailings were paused in 2020, causing a 71% drop in passengers compared to 2019 (Cruise Lines International

Association, 2021). In addition to the detrimental effects on financial and operational performance, the Covid-19 pandemic also brought about significant changes in consumer behavior and expectations in the hospitality industry. Health and safety became the foremost concerns for consumers, leading to the rise of 'hygiene tourism', where cleanliness, sanitation protocols, and physical distancing measures became crucial factors in consumers' decision-making process (Gursoy et al., 2020).

Hospitality businesses had to rapidly adapt to these changes and implement comprehensive health and safety measures to regain consumer trust and stimulate demand. These measures included enhanced cleaning protocols, contactless services, flexible booking policies, and innovative offerings such as 'work from hotel' packages (Deloitte, 2021). Many businesses also leveraged digital technologies to facilitate contactless experiences and ensure safety.

#### ***2.1.4 Strategies for Improving Performance in the Hospitality Industry***

The hospitality industry is dynamic and ever-changing, and the competitive landscape has been further complicated by the unprecedented challenges presented by the Covid-19 pandemic. However, these challenges have also opened up opportunities for businesses to rethink their strategies and innovate to enhance their performance. Here are some strategies that can be employed to improve performance in the hospitality industry.

**Customer Centricity:** In an era of increasing competition and shifting customer expectations, putting customers at the heart of the business strategy is more important than ever. Understanding and anticipating customer needs and preferences, personalizing the customer experience, and exceeding customer expectations can help businesses attract new customers, retain existing ones, and enhance their overall performance (Kapiki, 2012). This includes investing in research to understand customer behaviour, leveraging data analytics to personalize offerings, and providing excellent customer service.

**Digital Transformation:** Technology plays a crucial role in the hospitality industry, enhancing operational efficiency, improving customer experience, and driving revenue growth. Digital transformation includes leveraging technology for online bookings, mobile check-ins, virtual tours, and automated customer service (Ivanov & Webster, 2017). Furthermore, the use of data analytics can provide valuable insights into customer behaviour and preferences, helping businesses tailor their offerings and marketing strategies.

**Sustainability:** With growing awareness about environmental issues, incorporating sustainability into the business model can enhance the performance of hospitality businesses. This includes implementing green practices like reducing energy and water consumption, minimizing waste, and sourcing locally produced food and supplies (Jones et al., 2016). A commitment to sustainability can improve the business's reputation, attract environmentally conscious customers, and result in cost savings.

**Strategic Partnerships:** Forming strategic partnerships can provide a competitive advantage and enhance performance. This could involve partnering with travel agencies, local businesses, or online platforms to broaden the customer base, improve services, and increase visibility (Bieger et al., 2016).

**Employee Engagement:** Employees are the face of any hospitality business, and their performance directly influences the customer experience and satisfaction. Engaging employees, providing them with appropriate training and fair compensation, and creating a positive work environment can improve service quality, increase employee satisfaction and retention, and ultimately enhance business performance (Madera et al., 2017).

**Health and Safety Measures:** In the wake of the Covid-19 pandemic, implementing and communicating health and safety measures have become crucial to regain customer trust and drive demand. This includes enhanced cleaning protocols, social distancing measures, and contactless services. Businesses can also seek health and safety certifications to assure customers of their commitment to hygiene and safety (Gursoy et al., 2020).

**Revenue Management:** Effective revenue management involves using pricing strategies to maximize revenue, particularly during periods of fluctuating demand. This includes yield management, dynamic pricing, and price differentiation based on customer segments and booking channels (Kimes, 2011).

**Diversification:** Diversifying the service offerings can attract a broader customer base and generate additional revenue streams. This could involve offering ancillary services such as wellness facilities, catering services, or organizing events and experiences (Sigala, 2020).

**Crisis Management:** Having a robust crisis management plan is crucial to navigate unexpected challenges and recover quickly. This involves planning for various scenarios, having a communication strategy in place, and being agile and responsive to changes (Ritchie, 2004).

Continuous Improvement: The hospitality industry is constantly evolving, and businesses need to continually monitor their performance, learn from their experiences, and strive for improvement. This involves seeking feedback from customers and employees, analysing performance metrics, and making necessary adjustments to the strategies and operations (Phillips & Louvieris, 2005)

## **2.2 The Zambian Hospitality Industry and the Impact of COVID-19**

The Zambian hospitality sector has also had to adapt to changing consumer behaviours and preferences caused by the pandemic. A heightened focus on health and safety has led businesses to implement stringent sanitation protocols, temperature checks, contactless services, and physical distancing measures (ZTA, 2020). Businesses also had to innovate and diversify their offerings to cater to shifting consumer demands. For instance, some restaurants pivoted to offering take-away and delivery services, hotels introduced work-from-hotel packages targeting remote workers, and travel agencies promoted domestic tourism packages to offset the decline in international tourists (ZTA, 2020). Additionally, digital transformation has become an essential strategy for survival and recovery in the Zambian hospitality sector. Digital platforms for online bookings, virtual tours, contactless payments, and online marketing became critical in the pandemic era. While larger businesses were able to adopt these technologies relatively quickly, smaller businesses faced challenges due to the high costs of technology, limited digital skills, and issues related to digital infrastructure and internet connectivity (Nkonge, 2020). Moreover, the pandemic has underlined the importance of sustainability in the Zambian hospitality sector. There is a growing realization that a resilient recovery must be a green recovery. Businesses are encouraged to adopt environmentally friendly practices, such as reducing energy and water consumption, minimizing waste, and sourcing locally produced food and supplies (Mulenga & Bwalya, 2020). Besides benefiting the environment, these practices can also result in cost savings and attract eco-conscious customers.

Despite the challenges, there are reasons for optimism for the Zambian hospitality industry. Zambia's rich natural and cultural heritage, including the Victoria Falls, wildlife reserves, and traditional festivals, continue to be attractive to tourists. The country's geographical location, sharing borders with eight countries, offers significant potential for cross-border and regional tourism (ZTA, 2020). Zambia also hosts various international conferences and events, which

contribute to business tourism. Additionally, investments in transport infrastructure, such as the expansion of the Kenneth Kaunda International Airport and improved road networks, can enhance the country's accessibility and attractiveness as a tourist destination. Looking forward, the recovery of the Zambian hospitality industry from the impacts of Covid-19 will require continued government support, effective crisis management, increased digital adoption, a focus on sustainability, and the development of a diversified and resilient tourism product offering. Stakeholders in the industry, including the government, businesses, employees, and communities, must work together to navigate the challenges and capitalize on the opportunities to ensure the sector's sustainable and inclusive growth.

### **2.3 Challenges Faced by the Hospitality Industry During the COVID-19 Pandemic**

The COVID-19 pandemic presented numerous challenges to the hospitality industry, which can be categorized into economic, operational, workforce, and supply chain disruptions. Economic challenges faced by the hospitality industry during the pandemic primarily resulted from the drastic reduction in travel and tourism. With lockdowns, travel restrictions, and social distancing measures in place, hotels, restaurants, and other related businesses experienced significant declines in revenue (Gössling et al., 2020). This reduction in income caused financial strain, making it difficult for businesses to meet their financial obligations, such as paying rent, salaries, and loan repayments.

Operational challenges emerged as the hospitality industry struggled to adapt to the new normal. The need for enhanced cleaning and sanitization protocols, physical distancing measures, and contactless services increased operational costs and necessitated the modification of existing business models (Gursoy et al., 2020). Additionally, businesses had to navigate changing regulations and guidelines from governments and health authorities, further complicating day-to-day operations.

Workforce challenges were a significant concern for the hospitality industry during the pandemic. With decreased demand for services, many businesses were forced to furlough, lay off, or terminate employees (Baum & Hai, 2020). This loss of employment not only impacted the livelihoods of those working in the industry, but also resulted in a loss of skilled and experienced labour that could affect the sector's recovery. Furthermore, maintaining employee safety and wellbeing became a top priority, necessitating the implementation of new safety protocols and employee training.

Supply chain disruptions occurred as the pandemic impacted global trade, causing delays and shortages of essential supplies, such as food and beverages, cleaning products, and personal protective equipment (PPE) (Ivanov, 2020). These disruptions led to increased costs and operational difficulties for hospitality businesses, as they had to find alternative suppliers or adjust their offerings to accommodate the limited availability of goods.

## **2.4 Crisis Management in the Hospitality Industry**

Crisis management in the hospitality industry is crucial to ensure the survival and recovery of businesses during unforeseen events such as the COVID-19 pandemic. Implementing effective crisis management strategies involves understanding frameworks and models, adopting best practices, and recognizing the importance of communication.

Crisis management frameworks and models provide guidance for businesses in the hospitality industry to navigate and respond to crises effectively. One notable model is the three-stage crisis management model, which includes pre-crisis, crisis response, and post-crisis phases (Faulkner, 2001). The pre-crisis phase involves risk assessment, prevention, and preparedness, while the crisis response phase focuses on immediate actions to minimize the impact. Finally, the post-crisis phase involves evaluating the response, learning from the experience, and preparing for future crises.

Best practices in crisis management for the hospitality industry include the development of comprehensive crisis management plans, cross-functional crisis management teams, and regular training and simulations (Ritchie, 2004). A well-prepared crisis management plan should outline the roles and responsibilities of employees, the chain of command, communication protocols, and recovery strategies. Additionally, having a cross-functional team ensures that various aspects of the business are considered during the crisis response, and regular training and simulations help employees become familiar with their roles and responsibilities during a crisis.

The role of communication in crisis management is critical, as it helps to provide accurate information, maintain trust, and minimize confusion and panic (Coombs, 2014). Effective communication involves delivering timely and transparent messages to stakeholders, including employees, customers, suppliers, and the media. It is essential to ensure that messages are consistent across all communication channels and that any misinformation is promptly addressed. In the context of the hospitality industry, businesses must also maintain open lines

of communication with relevant government and health authorities, as their guidelines and regulations can directly impact operations.

## **2.5 Resilience and Recovery in the Hospitality Industry**

The COVID-19 pandemic has had a significant impact on the hospitality industry globally, with many businesses experiencing financial losses and closure. However, some businesses have demonstrated resilience, adapting to the changing environment and remaining profitable. Resilience refers to an organization's ability to withstand, recover from, and adapt to crises and disruptions (Pellegrini & Ciappei, 2019). Factors contributing to resilience in the hospitality industry include financial flexibility, diversified revenue streams, and agility in responding to change. Financial flexibility involves having access to capital and the ability to manage cash flow effectively. Diversified revenue streams involve generating income from multiple sources, reducing reliance on a single source of revenue. Agility in responding to change involves the ability to adapt quickly to changing circumstances and implement new strategies to remain profitable (Gössling et al., 2020).

Strategies for recovery in the post-pandemic era include investing in technology, improving health and safety measures, and enhancing the customer experience. The pandemic has accelerated the adoption of technology in the hospitality industry, with businesses implementing contactless check-in and payment systems to reduce physical contact. Improving health and safety measures involves implementing measures such as sanitization, social distancing, and mandatory mask-wearing to ensure the safety of guests and employees. Enhancing the customer experience involves providing personalized and unique experiences that meet the changing needs and preferences of customers (Sigala et al., 2020).

Innovations and adaptations in the hospitality industry during and after the pandemic include new service delivery models, such as cloud kitchens and ghost restaurants, to meet the increasing demand for delivery and take-out services. Additionally, hotels have repurposed their facilities to serve as quarantine centres and isolation facilities for COVID-19 patients, demonstrating flexibility and adaptability (Gössling et al., 2020).

## **2.6 Lessons Learnt from the Review Literature**

The literature review explored the impact of COVID-19 on the hospitality industry, with a focus on the Zambian context. The existing literature examined the economic, operational, workforce, and supply chain challenges faced by the industry during the pandemic.

Additionally, the review discussed crisis management in the hospitality industry, highlighting the importance of frameworks and models, best practices, and the role of communication.

#### Research Gaps:

Despite the extensive research on the impact of COVID-19 on the hospitality industry, several research gaps have been identified, which this study aims to address:

1. Limited research on the Zambian hospitality industry's response to the pandemic: While the literature discussed the global hospitality industry's response to COVID-19, there is a scarcity of research focusing specifically on the Zambian context. This study will contribute to the understanding of how the Zambian hospitality industry has adapted and responded to the crisis.
2. Exploration of long-term strategies and innovations: The existing literature predominantly addresses the immediate impact and responses to the pandemic. This study aims to investigate the long-term strategies and innovations implemented by the hospitality industry in Zambia to facilitate recovery and resilience in a post-pandemic environment.
3. Evaluation of the effectiveness of government policies and interventions: While the literature highlights the various government policies and interventions implemented to support the Zambian hospitality industry, there is limited research on the effectiveness of these measures. This study will examine the impact of government support on the industry's recovery and identify potential areas for improvement.

## CHAPTER 3

### THEORETICAL AND CONCEPTUAL FRAMEWORK

#### 3.1 Introduction

This chapter outlines the theoretical and conceptual foundations which guided this research investigation. Establishing a strong framework is central for maintaining continuity across the study methodology, analysis, and interpretations. Key theories like the Crisis Management Theory inform the research by offering scientifically-grounded models to assess organizational preparation, response, and recovery from disruptions. Meanwhile, the customized conceptual framework hones in on variables specific to this context - the COVID-19 pandemic and Zambia's hospitality sector. Integrating these theoretical and conceptual elements provides a multi-dimensional lens to examine an intricate, unfolding crisis, its impacts, and responsive measures. This grounds the study within scholarly discourse while capturing nuanced pandemic-induced shifts using tailored variables.

#### 3.1 Theoretical Framework

This research is grounded in the theoretical foundations of crisis management, specifically drawing on the Crisis Management Theory (CMT) which has its roots in organizational business literature. As the hospitality sector confronted unprecedented upheaval amidst the COVID-19 pandemic, the application of established crisis management frameworks to examine organizational preparation, response, and outcomes is imperative.

##### Origins of Crisis Management Theory

The genesis of the Crisis Management Theory lies in scholarship addressing organizational behaviours and strategies in turbulent, high-stakes environments. Foundational research by scholars like Barton (1993) and Pearson and Clair (1998) set the groundwork by advocating planned approaches instead of ad hoc responses to crises. Their premise was that organizations can and should augment their crisis preparedness by systematically anticipating different disruptive scenarios and formulating contingency plans for the same. These studies differentiated between internally induced crises due to organizational deficiencies versus external crises emerging from environmental jolts outside an entity's influence or control (Boin, Stern & Sundelius, 2016). This delineation of driving factors proves relevant in understanding COVID-19 as an unforeseen and externally-driven crisis for the hospitality sector.

Other seminal works expounding core tenets of the Crisis Management Theory include those by Fink (1986), Quarantelli (1988), and Shrivastava (1993). As organizations recognized crisis vulnerability amidst globalization and technology advancement, these scholars exemplified ways to manage and mitigate risk through preparedness regimes. Shrivastava (1993) notably highlighted ecological sustainability in addition to organizational efficiency, underscoring the interconnectedness of business health, human welfare, and environmental wellbeing. Moreover, Cerullo and Cerullo (2004) brought a business continuity orientation to crisis scholarship. By advising resilient backup mechanisms for vital functions, they set the stage for contemporary literature addressing crisis management holistically across risk assessment, governance, leadership, culture, and recovery capacities.

A fundamental crisis management model emerged through the work of Faulkner (2001), outlining a systematic progression of pre-crisis, crisis response, and post-crisis phases. This aligns directly to the research objectives formulated for this study examining Zambia's hospitality ecosystem across comparable timeframes. Undergirded by such scholarship, Coombs (2014) integrated concepts into an overarching paradigm of evidence-driven Crisis Management principles. This theory advocates preparing for negative occurrences, follow decisive crisis response strategies during turmoil, then purposefully evaluate outcomes for improvement. In essence, it provides a principled blueprint for organizations to navigate major disruptions.

#### Key Studies Supporting the Theory

Several empirical investigations validate the significance of theory-based crisis management for organizational resilience. In analysing over 800 corporate crises, Pearson and Clair (1998) developed an evidence-led taxonomy of crisis types based on causal origins including natural disasters alongside product flaws or management misconduct. Their typology reinforced crisis preparedness as it enables anticipation of potential triggers. Another seminal study by Barton (2001) reviewed 31 in-depth case studies of crises, revealing how Sans perspective before and after a disaster influenced its handling and propagated organizational learning. Meanwhile, Jaques' (2007) issue management model added timeliness as a key variable, stressing rapid mobilization of resources at crisis onset. These works exemplify Theory application to hone suitable responses, proper timing and post-event learning.

Within hospitality and tourism literature, scholars have also empirically studied crisis impacts and management strategies. Ritchie (2004) examined stakeholder collaboration in a destination

crisis recovery framework. Findings showed coordinated leadership and proactive communication rebuild tourism quicker. Paraskevas et al. (2013) developed an evidence-based model prioritizing crisis preparedness notwithstanding economic trade-offs, advocating simulations, continuity planning and resource management. More recently, crisis leadership studies have uncovered qualities like ethical decision-making, flexibility and compassion enable businesses to support employees and communities during hardship (Babar & Syed, 2019; Kukanja & Planinc, 2021). Such empirical analyses spotlight strategic adaptations aligned to the Crisis Management Theory to enhance organizational viability against disruptions.

### Application in This Study

The Crisis Management Theory holds direct relevance as an overarching framework guiding this research given COVID-19's extraneous onslaught on Zambia's hospitality sector starting 2020. The specific tenets lend structure for a methodical investigation across three distinct phases:

- Pre-crisis phase aligning before 2020 to assess the industry's pre-pandemic performance, anticipating disruption probability.
- In-crisis phase matching crisis response from 2020-2022 with lockdowns, evaluating strategies and losses.
- Post-crisis phase examining long-term adaptations enabling recovery.

This phased evaluation facilitated via the CMT lens has parallels with the study's objectives seeking to understand the industry's journey from growth through COVID-induced turmoil. It enables contemplating if pre-emptive risk management may have buffered socioeconomic shocks and comparing efficacy of reactive response measures in stimulating rebound. Furthermore, the CMT provides a theoretical platform to deliberate alignment of Zambian hospitality sector actions with established best practices around crisis governance mechanisms, communication and capability-building for resilience (Wang & Ritchie, 2013). The theory also directs systematic data gathering across the timeline be analysed for patterns explaining recovery trajectories based on crisis characteristics and organizational attributes (Pforr & Hosie, 2008). In essence, applying this theory promotes methodical, evidence-driven assessment of a hospitality industry rattled by a risk unforeseen. It presents the possibility to distill transferable insights for readiness against future disruption. Thus, the Crisis

Management Theory delivers an authoritative theoretical foundation for this research exploring turbulence in tourism ecosystems.

### **3.2 Conceptual Framework**

This section presents a conceptual framework that deconstructs the research topic, "The Effect of COVID-19 on the Performance of Zambia's Hospitality Industry," into its key variables and their hypothesized relationships. The framework provides a clear visualization of the independent variable (COVID-19) and the dependent variables (various performance indicators of the hospitality industry).

#### ***3.2.1 Development of the Conceptual Framework***

The conceptual framework has been developed to identify and articulate the independent and dependent variables distinctly, as well as their relationships. The framework draws upon relevant literature in the fields of crisis management, tourism, and hospitality, considering the unique context of the Zambian hospitality industry during the COVID-19 pandemic. The independent variable, COVID-19, is positioned at the centre of the framework, as it represents the primary external factor influencing the performance of Zambia's hospitality industry. The framework recognizes that the impact of COVID-19 on the industry is multifaceted, affecting various aspects of its performance. These aspects are represented as dependent variables, which are categorized into four main domains: Financial Performance, Operational Performance, Market Dynamics, and Recovery Indicators.

The framework incorporates insights from crisis management literature, particularly the works of Ritchie (2004) and Faulkner (2001), which highlight the importance of understanding the phases of a crisis and the corresponding strategies for response and recovery. The framework adapts these concepts to the specific context of the COVID-19 pandemic and its impact on the Zambian hospitality industry. Furthermore, the framework integrates key findings from recent studies on the impact of COVID-19 on the global tourism and hospitality sectors (Gössling et al., 2020; Sigala, 2020). These studies provide valuable insights into the common challenges faced by hospitality businesses during the pandemic, such as travel restrictions, reduced demand, and operational disruptions. The framework incorporates these challenges as potential mediating factors that influence the relationship between COVID-19 and the performance of Zambia's hospitality industry.

#### ***3.2.2 Independent Variable:***

COVID-19 Represents the primary external factor influencing the performance of Zambia's hospitality industry. Encompasses various dimensions of the pandemic, such as its severity, duration, and the associated government responses (e.g., lockdowns, travel restrictions).

### ***3.2.3 Dependent Variables***

#### **a. Financial Performance**

1)Revenue: Measures the impact of COVID-19 on the industry's income generated from various sources, such as accommodation, food and beverage, and events. 2)Profitability: Assesses the effect of COVID-19 on the industry's ability to generate profits, taking into account factors such as reduced demand and increased operational costs.3) Investment: Examines the influence of COVID-19 on capital investments in the industry, including new projects, renovations, and expansions.

#### **b. Operational Performance**

1)Occupancy Rates: Evaluates the impact of COVID-19 on the proportion of available rooms or seats occupied by guests.2) Employment: Assesses the effect of COVID-19 on the industry's workforce, including job losses, furloughs, and changes in staffing levels. 3)Supply Chain Disruptions: Examines the influence of COVID-19 on the industry's ability to procure goods and services, such as food, beverages, and cleaning supplies.

#### **c. Market Dynamics**

1)Tourist Arrivals: Measures the impact of COVID-19 on the number of international and domestic tourists visiting Zambia. 2)Length of Stay: Assesses the effect of COVID-19 on the average duration of tourists' visits to Zambian hospitality establishments. 3)Tourist Spending: Examines the influence of COVID-19 on the amount of money tourists spend on accommodation, food, and other services in the hospitality industry.

#### **d. Recovery Indicators**

1)Adaptability: Evaluates the industry's ability to adjust its operations, services, and strategies in response to the challenges posed by COVID-19. 2)Resilience: Assesses the industry's capacity to withstand and recover from the adverse effects of the pandemic. 3)Innovation: Examines the industry's adoption of new technologies, processes, and business models to navigate the challenges and opportunities presented by COVID-19.

### ***3.2.4 Mediating Factors***

1) Government Policies: Considers the role of government interventions, such as stimulus packages, tax relief, and health and safety regulations, in shaping the impact of COVID-19 on the industry's performance. 2) Consumer Behaviour: Acknowledges the influence of changes in consumer preferences, risk perceptions, and travel patterns on the demand for hospitality services during the pandemic. 3) Competitive Landscape: Recognizes the potential impact of COVID-19 on the competitive dynamics within the industry, such as the entry or exit of players, and changes in market share.

### ***3.2.5 Relationships Between Elements***

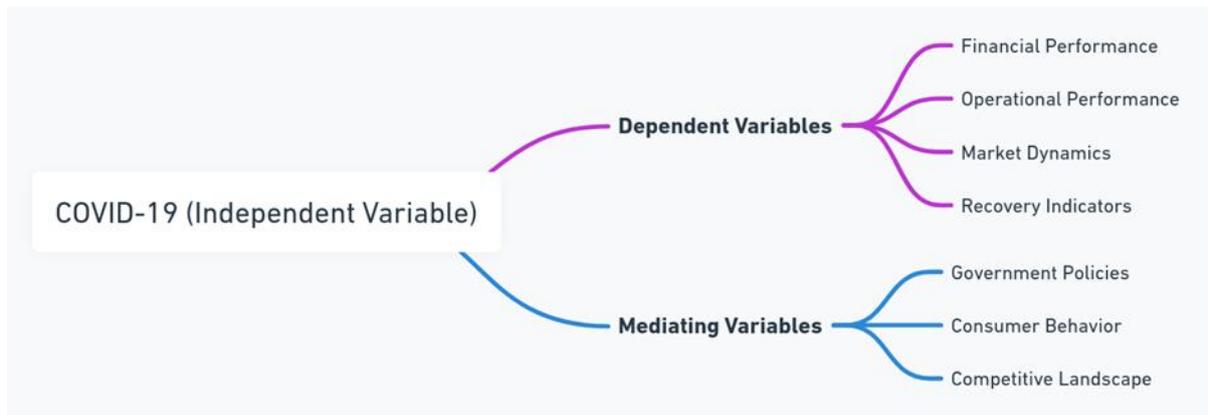
The conceptual framework hypothesized that COVID-19, as the independent variable, directly influences the dependent variables of financial performance, operational performance, market dynamics, and recovery indicators in Zambia's hospitality industry. The severity and duration of the pandemic, along with the associated government responses, are expected to have significant impacts on these performance domains.

The framework also acknowledges the potential mediating role of government policies, consumer behaviour, and the competitive landscape in shaping the relationship between COVID-19 and the industry's performance. For example, effective government support measures may help mitigate the negative financial impact of the pandemic, while changes in consumer preferences may necessitate adaptations in the industry's offerings and strategies.

The interrelationships among the dependent variables are also recognized in the framework. For instance, reduced tourist arrivals and spending (market dynamics) may lead to lower occupancy rates and revenue (financial performance), which in turn may result in job losses and supply chain disruptions (operational performance). Conversely, the industry's adaptability, resilience, and innovation (recovery indicators) may help mitigate the adverse effects on financial and operational performance.

The conceptual framework presents a comprehensive and systematic approach to understanding the complex relationships between COVID-19 and the performance of Zambia's hospitality industry. By clearly identifying the independent and dependent variables, along with the potential mediating factors, the framework provides a solid foundation for empirical investigation and analysis.

Figure 3.1 presents a comprehensive conceptual framework that summarises the multifaceted impacts of the COVID-19 pandemic on Zambia's tourism sector.



*Figure 3.1: Conceptual Framework of COVID-19 Impact on Zambia's Tourism Sector*

### **3.2.6 Application of the Conceptual Framework**

The conceptual framework served as a guiding tool for data collection, analysis, and interpretation throughout the research process. It ensured that the study remained focused on the key variables and their interrelationships, enabling a comprehensive understanding of the impact of COVID-19 on Zambia's hospitality industry.

In terms of data collection, the framework informed the selection of appropriate methods and sources to gather information on the identified variables. This included secondary data sources, such as, tourism statistical digest , and government Statutory instruments which were implemented, as well as primary data collected through interviews with industry stakeholders. During the data analysis phase, the framework provided a structure for organizing and interpreting the collected data. The independent variable, COVID-19, was assessed in terms of its severity, duration, and associated government and industry responses. The dependent variables were analysed using relevant metrics and indicators, such as changes in revenue, occupancy rates, employment levels, and tourist arrivals. The mediating factors were examined to understand their influence on the relationship between COVID-19 and the industry's performance. The framework also guided the interpretation of the findings, enabling the researcher to draw meaningful conclusions about the impact of COVID-19 on Zambia's hospitality industry.

### **3.3 Conclusion**

This chapter established the theoretical and conceptual foundation central to this research inquiry. The application of the Crisis Management Theory offers a scientifically grounded paradigm for assessing the hospitality industry's trajectory through a disruptive pandemic. Its

phases direct a methodical timeline analysis of organizational preparedness, response efficacy, and recovery dynamics. The tailored conceptual framework contextualizes this approach to examine COVID-induced systemic shocks, innovative adaptations and demand fluctuations specific to Zambia's tourism sector. Integrating the frameworks enables drawing on established crisis management perspectives while probing hospitality domain complexities triggered externally. Fundamentally, this unified framework aligns closely with study's objectives framed across corresponding timeframes of analysing pre-pandemic performance, pandemic impact and rebuilding patterns. It structures evidence gathering and interpretation protocols to examine realigned consumer preferences, organizational resilience capacities and policy interventions recouping the sector after a destabilizing blow. Blending conceptual specificity with generalizable theory also provides analytical depth across micro and macro scales.

## CHAPTER 4

### RESEARCH METHODOLOGY

#### 4.0 Introduction

This chapter outlines the research methodology utilized in this study, providing a comprehensive overview of the research design, study location, methods of data collection, and techniques for data analysis. The purpose of this chapter is to detail the systematic and coherent approach taken to answer the research questions and achieve the study's objectives.

Firstly, the chapter discusses the overall research design, which serves as the foundational blueprint guiding the study's structure and process. It then specifies the study location, offering context and justification for the chosen setting. Following this, the chapter elaborates on the methods of data collection employed, detailing both qualitative and quantitative approaches where applicable. Finally, it describes the techniques for data analysis, ensuring clarity and reproducibility of the study's findings.

#### 4.1 Research Philosophy

This research is underpinned by the philosophy of pragmatism, which focuses on the practical implications and real-world applications of the research findings. As explained by Kaushik & Walsh (2019), pragmatism directs scientific inquiry towards useful, actionable outcomes that can inform evidence-based practice. This aligns closely with the objectives of this study examining the hospitality industry's journey through an impactful pandemic. Specifically, pragmatism guides the formulation of research questions that probe practical issues facing hospitality enterprises, policymakers and multiple stakeholders (Creswell & Creswell, 2017). It grounds the inquiry in tangible problems the Zambian tourism industry is wrestling such as declining tourist arrivals or infrastructure limitations that demand urgent solutions. Accordingly, data collection and analysis methods are oriented towards informing actionable measures for tourism ecosystem strengthening. Mixing qualitative stakeholder narratives with statistical digests provides integrated insights into realistic navigation pathways leveraging crisis adversity for constructive transformation. Moreover, the change-oriented pragmatic approach motivates discussing practical implications and prescriptive recommendations stemming from research findings rather than purely descriptive inferences (Kaushik & Walsh, 2019).

## **4.2 Research Design**

The research employs a cross-sectional mixed methods design, integrating both qualitative and quantitative approaches to facilitate a comprehensive understanding of the hospitality industry in Zambia. This study is broken down into three distinct periods for analysis: the pre-COVID-19 era from 2015 to early 2020, the COVID-19 period from early 2020 to late 2022, and the post-pandemic phase, which includes data up to April 2023. The mixed methods design enriches the study by combining the depth of qualitative insights with the breadth of quantitative data. The qualitative component is pivotal for examining the specific challenges, strategies implemented, and resilience factors that characterized the industry during and after the COVID-19 pandemic. It focuses on the experiences and perceptions of stakeholders, offering a nuanced understanding of their responses to the pandemic. Concurrently, the quantitative aspect will involve the analysis of industry performance metrics, such as revenue and occupancy rates, across the three defined periods. This approach provided a more comprehensive view, allowing for a statistical comparison of the industry's performance before, during, and after the pandemic. The cross-sectional component of the design aids in collecting data at one specific point in time, providing a snapshot of the industry's state during the study period. This approach is apt for capturing the lived experiences and viewpoints of participants, particularly concerning the impact of COVID-19 on Zambia's hospitality sector.

## **4.3 Study Site**

The research is centered in Lusaka, Zambia's capital city. Lusaka was chosen because it serves as a significant hub for both domestic and international travel, making it a key area for investigating the impact of COVID-19 on the hospitality industry. The city is home to numerous hotels and other hospitality establishments.

## **4.4 Sample Size**

The sample size for interviews was set at 5, based on guidance from qualitative research experts like Fusch and Ness (2015) who recommend a range of 4 to 12 interviews for smaller scale qualitative studies focusing on capturing in-depth insights. As Creswell and Poth (2018) articulate, the intent behind qualitative inquiry is not statistical generalization but rather delving into details and describing complex phenomena. Considering resource constraints alongside research objectives focusing in detailed experiences rather than variance detection, a sample of 5 enables sufficient perspective diversity without compromising richness (Malterud et al., 2015). Therefore, 5 key representatives were selected from the Ministry of Tourism and Arts

based on relevance of insights they could provide given their tourism oversight roles and understanding of the issues under study. The respondents were chosen using purposive sampling to gather multiple viewpoints (Creswell & Poth, 2018). They included: Project Specialist - Tourism, District Culture Affairs Coordinator, Regional Tourism Coordinator, Policy Registry Officer, and Tourism Development & Research Officer. Their experience spanned from 1 to 6 years in respective roles. This cross-section of operational and policy-driven insights facilitated capturing COVID-19's varied influences on the hospitality sector with qualitative rigour.

In addition to interviews, Tourism Statistical Digests from 2015-2017 and 2021 consisting of sector-specific quantitative data were analysed as secondary sources to understand pre and during-pandemic performance trends. Document analysis of 4 key Government Statutory Instruments issued in 2020 amended tourism regulations to support the sector against pandemic duress. In total, 5 stakeholder interviews and document analyses of 9 artefacts (5 Statistical Digests + 4 Statutory Instruments) underpinned the methodological design for data triangulation. The mixed data supported robust inquiry despite a sample size optimised for the study's qualitative emphasis and scope considerations.

#### **4.5 Sampling Techniques**

In this research, purposive sampling techniques were employed for the selection of government officials from the Ministry of Tourism and Arts (MoTA). This non-probability sampling method was chosen due to the specific nature of the research questions and the need for specialized information from individuals with direct experience and knowledge about the impact of COVID-19 on Zambia's hospitality industry and to ensure that the selected individuals held positions that were directly related to tourism policy, development, and administration. These roles were crucial to understanding the government's response to the challenges posed by the pandemic and provided insights into the statutory instruments and policies implemented. The selected officials had varying levels of experience and responsibilities, providing a comprehensive perspective on the government's involvement in the hospitality industry.

For documents, Tourism Statistical Digests published from 2015-2017 and 2021 were reviewed to gather quantitative performance metrics on tourist arrivals, occupancy rates and earnings before and during the pandemic. These digests were specifically chosen due to containing hospitality industry data aligned to the research objectives on pre/during pandemic

performance. Furthermore, 4 Government Statutory Instruments issued in 2020 introducing COVID-19 regulatory amendments were analysed given their direct relevance to the research focus. The chosen documents provided targeted, contextually relevant data to augment primary interview findings. As with interview participants, these documents were purposively sampled to obtain context-specific qualitative and quantitative information for a methodological triangulation while addressing the research questions regarding industry performance changes because of the external pandemic shock. The purposive sampling technique enabled extracting insights from information-rich yet focused data sources closely tied to Zambia's hospitality sector dynamics during the pandemic timeline under examination.

#### **4.6 Data Collection Procedures and Instruments**

Structured interviews were carried out with government officials from the Ministry of Tourism and Arts (MoTA). These interviews were designed to gather qualitative data on the experiences, perceptions, and strategies of these key stakeholders during the pandemic. Prior to the interviews, informed consent was obtained from each participant, assuring them of the confidentiality of their responses. Interviews were conducted either in person or via virtual platforms, depending on the preference and availability of the respondents. Each interview lasted approximately 20 to 30 minutes.

In addition to interviews, document analysis was conducted to supplement the findings. This involved reviewing a series of Government Statutory Instruments related to the Tourism and Hospitality Act (Act No. 13 of 2015), which were issued primarily in the year 2020. A third layer of data collection involved the review of Tourism Statistical Digests for the years 2015-2017 and 2021. This document analysis aimed to understand the performance of Zambia's hospitality industry both before and during the COVID-19 pandemic. It allowed for a longitudinal view, capturing the industry's performance metrics across different periods. This included trends in international tourist arrivals, types of tourism, financial performance, and other key performance indicators. For example, the data from 2015-2017 provided insights into the performance of the industry in terms of financial earnings in both local currency and U.S. dollars, types of tourism, and employment in the hospitality sector. Meanwhile, the data from 2021 revealed how the industry is performing during the COVID-19 period, including changes in international tourist arrivals, room occupancy rates, and tourism's contribution to GDP. As for Data Collection Instruments, a structured interview guide was used. For document analysis,

templates were created to capture relevant information from the Government Statutory Instruments and the Tourism Statistical Digests.

#### **4.7 Data Analysis**

The data analysis for this research involved a multi-layered approach to ensure a nuanced understanding of the impact of COVID-19 on Zambia's hospitality industry. The process was designed to address each specific research objective and to interpret the data collected through interviews, document analyses, and quantitative metrics from the Tourism Statistical Digest. The qualitative data gathered from interviews with MoTA officials were transcribed and subjected to thematic content analysis. This involves identifying, coding, and categorizing patterns found in the data. Key themes such as "Challenges Faced," "Strategies Implemented," "Government Interventions," and "Industry Resilience" were developed in alignment with the research objectives. For the document analysis, Government Statutory Instruments were meticulously reviewed to extract relevant provisions, amendments, and guidelines that were enacted in response to the COVID-19 pandemic. These were then synthesized to understand the regulatory environment and its impact on the hospitality industry.

The quantitative aspects of the study were derived from the Tourism Statistical Digest. Metrics such as international tourist arrivals, types of tourism, financial earnings, and employment rates were extracted for the years 2015-2017 and 2021. This data provided a statistical backdrop against which the qualitative findings were compared, creating a comprehensive narrative that spans the pre-COVID-19 and COVID-19 periods in Zambia's hospitality sector. Data from these varied sources were then compared to identify consistencies or discrepancies. For example, themes emerging from the interviews were juxtaposed with provisions from Government Statutory Instruments and trends noted in the Tourism Statistical Digests. This triangulation approach allowed for a more integrated and robust understanding of the industry's response to the pandemic. To ensure validity and reliability, data from the different sources were cross-verified, enhancing the credibility of the research findings. The final step involved synthesizing all the analyzed data into a coherent narrative that addresses each of the research objectives. Visual aids such as charts, tables, and time series graphs were also generated to visually represent key findings, aiding in their comprehension and interpretation.

#### **4.8 Ethical Considerations**

Before embarking on the research process, approval was sought from The University of Zambia Humanities and Social Sciences Research Ethics Committee. The committee provided ethical clearance, ensuring that the study adheres to internationally recognized ethical guidelines and standards. Participants in the research, specifically those who were interviewed, were provided with a detailed consent form that outlined the purpose of the study, what their participation would entail, and how their data would be used and stored. The form also made it clear that participation was voluntary and that respondents could withdraw from the study at any point without facing any consequences. To protect the privacy of the participants, all personal identifiers were removed during the data analysis phase. The information gathered was stored securely, with only the researcher having access to it.

In the case of document analysis involving Government Statutory Instruments and Tourism Statistical Digests, care was taken to utilize the data only for academic purposes. Where necessary. The research was conducted with the utmost honesty and transparency. All procedures, methods, and findings were reported without any falsification or manipulation of data to ensure the credibility of the study.

#### **4.9 Conclusion**

This chapter has outlined the key components of the research methodology adopted for this study investigating the impact of COVID-19 on Zambia's hospitality industry. A mixed methods approach combining qualitative interviews and quantitative document analysis was formulated to enable triangulation and a multi-dimensional perspective. Details regarding the study site, sampling plan, data collection tools and analytical strategies have been delineated to provide a comprehensive picture of the methodological scheme steering this inquiry. Strategic selection of interview participants from the Ministry of Tourism and Arts along with Tourism Statistical Digests and Government Statutory Instruments will allow converging evidence regarding pre-pandemic performance, pandemic-response measures and post-crisis recovery pathways. Appropriate analytical procedures for interrogating varied data have been mapped. Ethical dimensions have been critically considered with due approvals.

## CHAPTER 5

### RESULTS AND PRESENTATION OF THE FINDINGS

#### 5.1 Introduction

This chapter outlines the findings for this study. It begins by assessing the industry's performance from 2015 to 2019, establishing a pre-pandemic baseline. The focus then shifts to the period from 2020 to 2022, critically examining the impact of the pandemic. Data for this analysis is drawn from interviews with officials from the Ministry of Tourism and Arts and supplemented by tourism statistical digests. This chapter also evaluates the strategies implemented by the industry and government in response to the pandemic. The effectiveness of these measures in mitigating the pandemic's impact and supporting industry recovery is analysed. Each section of this chapter corresponds to the specific objectives of the research, providing a comprehensive understanding of the hospitality sector's response and adaptation during a critical period.

#### 5.2 Demographic Information

This section of the chapter delves into the demographic information of the respondents from the Ministry of Tourism and Arts (MoTA). The analysis of demographic data is crucial as it provides context to the perspectives and insights shared by these respondents. Their backgrounds, roles, and years of experience contribute significantly to the depth and relevance of the information they provide, especially concerning the hospitality industry's performance in Zambia. To illustrate this, Table 5.1 is presented below. It summarises the demographic details of the MoTA respondents, outlining their roles, tenure, and primary responsibilities. This table serves as a foundation for understanding the calibre and scope of the insights gathered from these officials.

*Table 5.1: Demographic Information of MoTA Respondents*

<b>Role</b>	<b>Years of Experience</b>	<b>Main Responsibilities</b>
Policy Registry Officer	1	Responsible for the registration and oversight of tourism policies
Project Specialist - Tourism	6	Manages and coordinates tourism-related projects, ensuring alignment with national tourism strategies

Regional Tourism Coordinator	4	Oversees tourism activities in their region, including coordination of efforts between different stakeholders
District Culture Affairs Coordinator	2	Focuses on integrating cultural aspects into tourism, managing cultural programs at the district level
Tourism Development & Research Officer	3	Engaged in research and development of tourism strategies, including analysis of tourism trends and proposal of new initiatives

The diversity in the roles and experience levels of the MoTA respondents, as shown in Table 5.1, is vital. It ensures a comprehensive understanding of the various dimensions through which government strategies and policies impact the tourism sector. These officials provide a unique insight into the operational, strategic, and policy-driven aspects of the hospitality industry, particularly in the context of the challenges posed by the COVID-19 pandemic.

### 5.3 Performance of the Hospitality Industry in Zambia (2015-2019)

This section presents an analysis of the performance of Zambia's hospitality industry from 2015 to 2019. It brings together insights from government representatives at the Ministry of Tourism and Arts and data extracted from the Tourism Statistical Digests. This period, preceding the onset of the COVID-19 pandemic, is critical for understanding the baseline performance of the industry.

#### 5.3.1 Respondents

The viewpoints of various officials at the Ministry of Tourism and Arts provide a multifaceted perspective on the hospitality industry's performance during this period. To capture these insights, Table 5.2 is presented, summarizing the key themes identified from the interview responses.

*Table 5.2: Key Themes Identified from Interview Responses*

Theme	Description
Positive Growth and Increasing Revenue	There is a consensus among the respondents that the hospitality industry experienced significant growth during this period. The Policy Registry Officer noted a substantial increase in revenue through tourist arrivals, which aligns with the sentiments expressed by the Regional Tourism Coordinator, who mentioned increased tourist arrivals and occupancy rates.
Diversification and Expansion of Tourism Offerings	The responses, particularly from the District Culture Affairs Coordinator, highlighted efforts to expand tourism beyond traditional wildlife attractions. This included promoting cultural,

	adventure, and heritage tourism, contributing to the industry's overall appeal and growth.
Economic Conditions and Tourist Spending Patterns	The Project Specialist - Tourism pointed out that the industry's performance was closely linked to Zambia's economic conditions. Despite economic fluctuations, the overall trend was positive, with increasing profits and revenue.
Key Performance Indicators (KPIs)	The respondents identified several KPIs crucial for measuring the industry's performance. These included occupancy rates, increased tourist activities, average daily rates, customer satisfaction scores, and average length of stay. The emphasis on diverse KPIs indicates a multi-dimensional approach to evaluating industry performance.
Government's Objectives and Priorities	There was a clear focus on growing the hospitality industry to meet international standards and attract more tourists. Objectives such as infrastructure development, quality assurance, and promoting tourism diversification were frequently mentioned.

Table 5.2 encapsulates the key themes that emerged from the interview responses concerning the performance of Zambia's hospitality industry from 2015 to 2019. The period was marked by notable growth and revenue generation, fuelled by an increase in tourist arrivals and occupancy rates. A significant effort was made to diversify the tourism offerings, expanding beyond Zambia's renowned wildlife tourism to include cultural, adventure, and heritage tourism. Economic conditions played a crucial role, with the overall positive trend indicating an industry adaptable to economic fluctuations. The identified KPIs reflect a comprehensive approach to evaluating the industry's performance, considering a range of metrics from financial performance to customer satisfaction. The government's focus during this period was on elevating the industry to meet international standards, with significant emphasis on infrastructure development and quality enhancement. This overview provides a foundational understanding of the industry's state before the pandemic, setting a baseline for subsequent impact assessments.

### ***5.3.2 Analysis of Tourism Statistical Digests***

This subsection delves into an analysis of the Tourism Statistical Digests, which provide a wealth of quantitative data on Zambia's hospitality industry from 2015 to 2019. The focus here is on interpreting these figures to gain insights into the performance and trends within the industry prior to the pandemic. This analysis is crucial for establishing a baseline against which the pandemic's impacts can be measured.

Table 5.3 organizes vital statistics from the Tourism Statistical Digests, covering the years 2015 to 2017. This data includes international tourist arrivals, room and bed occupancy rates, tourism earnings, and employment figures within the hospitality sector.

*Table 5.3: Performance Indicators of Zambia's Hospitality Industry (2015-2017)*

<b>Year</b>	<b>International Tourist Arrivals</b>	<b>Room Occupancy Rate (%)</b>	<b>Bed Occupancy Rate (%)</b>	<b>Tourism Earnings (Local Currency, in billions)</b>	<b>Tourism Earnings (USD, in millions)</b>	<b>Employment in Hospitality</b>
2015	931,782	69.8	71.4	4.4	401	57,384
2016	956,332	42.0	26.0	4.37	N/A	57,393
2017	1,009,173	44.6	31.2	4.96	N/A	58,618

Table 5.3 reveals several significant trends in Zambia's hospitality industry. The period between 2015 and 2017 saw a consistent increase in international tourist arrivals, indicating a growing attraction of Zambia as a tourist destination. However, the room and bed occupancy rates experienced fluctuations, particularly in 2016, suggesting potential external influences or market challenges. Despite these variations, there was a steady rise in tourism earnings in local currency, reflecting the financial strength of the sector. The employment figures also increased slightly each year, indicating a stable or expanding industry in terms of job creation.

#### Visualizing Trends Through Line Graphs

The trends and shifts in the hospitality industry are further explained in Figure 5.1, which presents line graphs for the same performance indicators over the specified period.

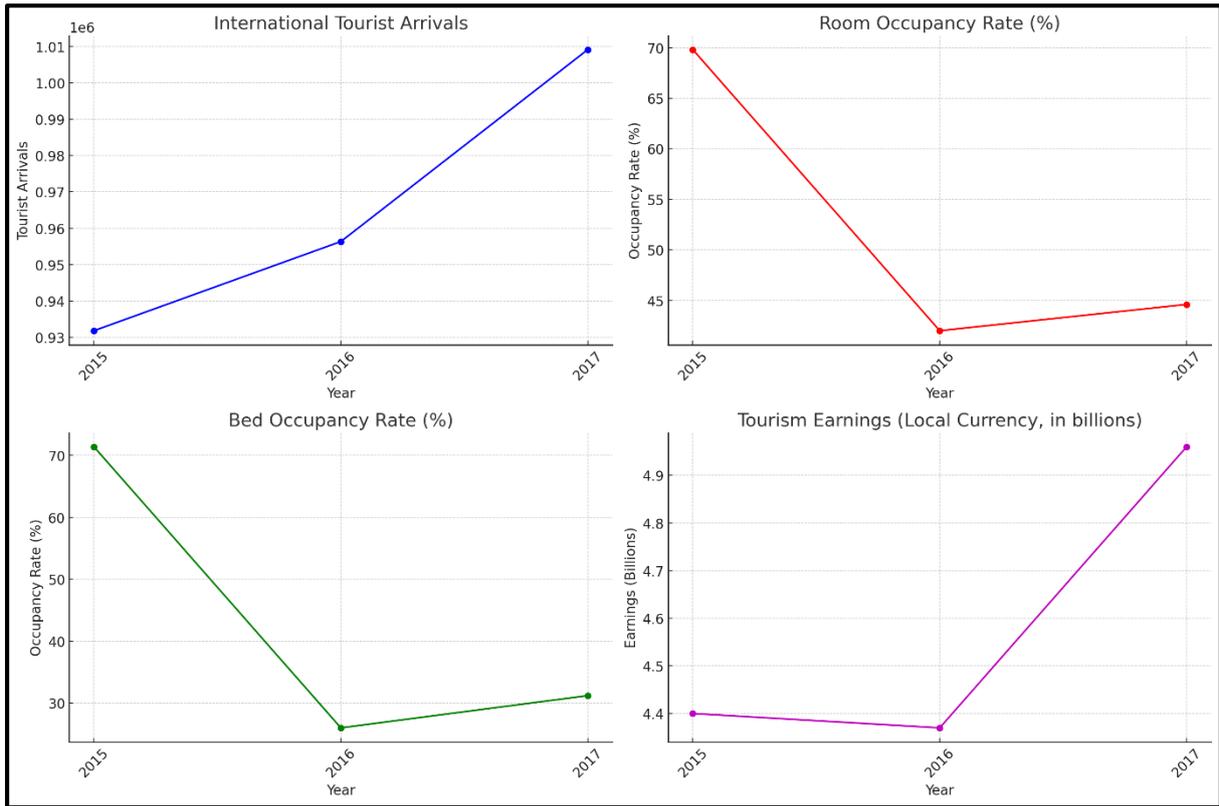
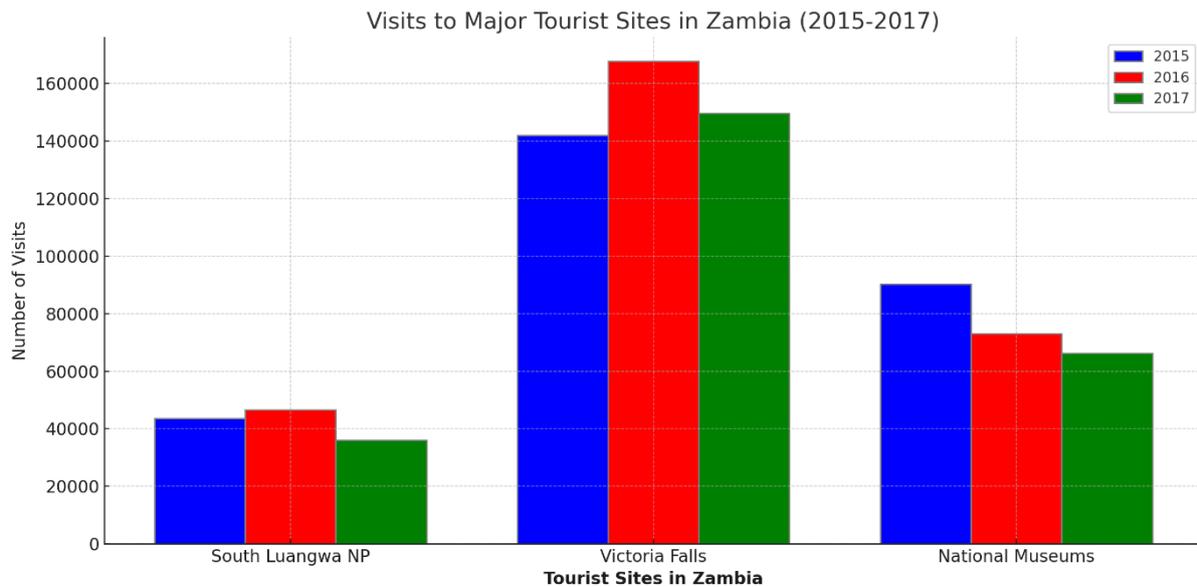


Figure 5.1: Trend Analysis of Zambia's Hospitality Industry (2015-2017)

The line graphs in Figure 5.1 offer a visual narrative of the evolving hospitality sector in Zambia. The ascending trend in international tourist arrivals across the years underscores Zambia's escalating popularity as a travel destination. The variations in room and bed occupancy rates might reflect changes in market dynamics or external economic factors. Notably, the continual increase in tourism revenue, even amidst occupancy rate fluctuations, highlights the industry's robustness and potential for growth. These graphical representations not only complement the data in Table 5.3 but also provide a dynamic and comprehensive overview of the industry's performance in the pre-pandemic era.

#### Comparative Analysis of Tourist Visits to Major Sites in Zambia

A bar chart is used here to compare the number of visits to three prominent tourist sites in Zambia—South Luangwa National Park, Victoria Falls, and National Museums—across the years 2015 to 2017.



*Figure 5.2: Tourist Visits to Major Sites in Zambia (2015-2017)*

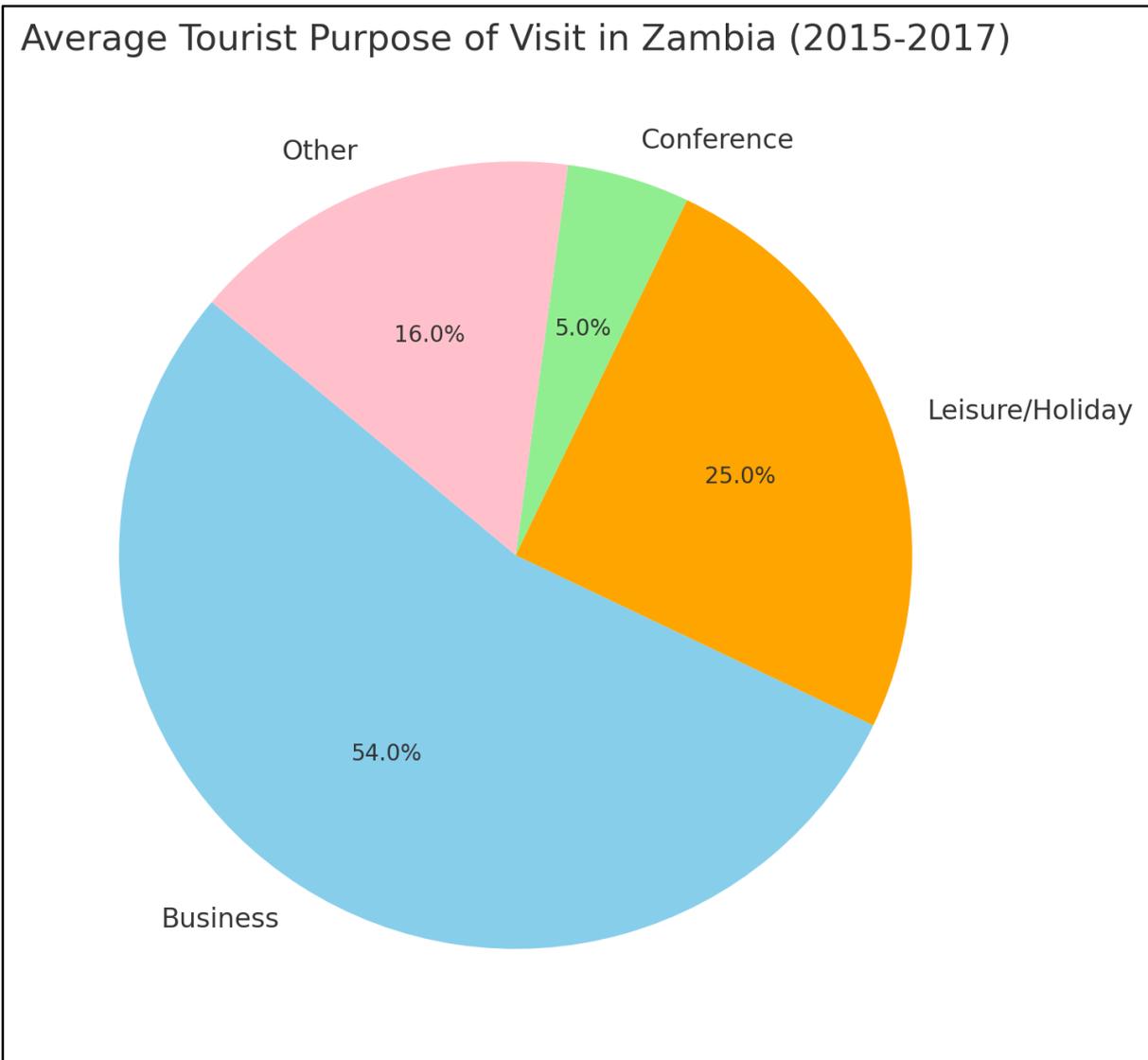
As can be seen from figure 5.2, South Luangwa National Park experienced an increase in tourist visits from 2015 to 2016, indicating growing interest. However, there was a notable decline in 2017, which could be attributed to various factors like market trends or external influences. Victoria Falls showed a rise in visitation in 2016, followed by a drop in 2017. Despite the decrease, it maintained relatively high visitation numbers, signifying its continued popularity.

National Museums witnessed a downward trend in the number of visits across these years, suggesting changing tourist interests or possibly increased competition from other attractions.

This analysis provides valuable insights into the shifting preferences of tourists in Zambia and highlights the attractions that have consistently drawn visitors.

#### Average Tourist Purpose Distribution: 2015-2017

Next, the focus shifts to the average distribution of tourists by their purpose of visit in Zambia, averaged over the years 2015 to 2017. This pie chart offers an aggregated view of why tourists visited Zambia during this period.



*Figure 5.3: Average Tourist Purpose Distribution in Zambia (2015-2017)*

The pie chart represents the averaged proportions of tourists' purposes of visit, providing a holistic view of travel motivations in Zambia. It illustrates that business tourism was a significant driver, followed by leisure/holiday visits. Other purposes, including conferences and visiting friends or relatives, also contributed to the tourist influx. This averaged representation balances out annual variances and offers a comprehensive picture of the tourist behavioural trends in Zambia from 2015 to 2017.

### ***5.3.3 Synthesis of the findings***

This subsection synthesizes the findings related to the first objective, analysing the performance of Zambia's hospitality industry from 2015 to 2019. It integrates insights from

interviews with government officials and quantitative data from the Tourism Statistical Digests, offering a comprehensive picture of the industry's pre-pandemic status.

*Table 5.4: Consolidated Findings from Interviews and Statistical Analysis*

<b>Aspect</b>	<b>2015-2017 Statistical Data</b>	<b>Interview Insights</b>
International Tourist Arrivals	- 2015: 931,782, 2016: 956,332, 2017: 1,009,173  <b>Trend:</b> Consistent increase each year.	Respondents noted significant growth, emphasizing increased tourist arrivals and occupancy rates.
Room & Bed Occupancy Rates	- 2015 Room: 69.8%, Bed: 71.4%, 2016 Room: 42.0%, Bed: 26.0%, 2017 Room: 44.6%, Bed: 31.2%  <b>Trend:</b> Fluctuating rates with notable decrease in 2016, followed by recovery in 2017.	KPIs identified by respondents include occupancy rates, suggesting their critical role in assessing industry performance.
Tourism Earnings	- 2015: K4.4 billion, USD 401 million, 2016: K4.37 billion- 2017: K4.96 billion  <b>Trend:</b> Steady increase in local currency.	Linked to Zambia's economic conditions; respondents noted a positive trend with increasing profits and revenue.
Employment in Hospitality	- 2015: 57,384- 2016: 57,393- 2017: 58,618  <b>Trend:</b> Slight increase each year.	Not directly addressed in interviews but implied in the context of industry growth.
Tourism Offerings & Diversification	Not quantitatively assessed in statistical data.	Strong emphasis on diversifying tourism offerings, including cultural, adventure, and heritage tourism, to enhance the industry's appeal.
Government's Objectives and Priorities	Not quantitatively assessed in statistical data.	Focus on elevating the industry to international standards, with objectives like infrastructure development, quality assurance, and promoting tourism diversification.

The data reveals a consistent increase in international tourist arrivals, a trend that aligns with interview responses highlighting significant growth in revenue driven by these arrivals. This

correlation suggests a direct impact of increased tourist numbers on the industry's revenue growth, affirming the sector's expansion during this period. Interviewees emphasized occupancy rates and various Key Performance Indicators (KPIs) as crucial metrics for evaluating the hospitality industry. Despite the statistical data showing fluctuations in occupancy rates, the emphasis by the respondents on these metrics suggests a more nuanced approach to assessing the industry's health, considering both tourist arrivals and accommodation usage.

The statistical data shows a slight increase in employment figures within the hospitality sector, which, though not directly addressed in the interviews, can be inferred as a consequence of the industry's growth. This suggests that the expansion of the industry, indicated by increased tourist arrivals and revenue, likely led to job creation.

One significant aspect that emerges from the interviews is the effort to diversify and expand Zambia's tourism offerings, which is not quantifiable in the statistical data. Respondents particularly highlighted the expansion beyond traditional wildlife tourism to include cultural, adventure, and heritage tourism. This strategic diversification aimed at enhancing the industry's overall appeal and growth. The interviews provided insights into the government's objectives and the broader economic conditions affecting the hospitality industry, aspects not directly evident in the statistical data. The focus on elevating the industry to meet international standards through infrastructure development, quality assurance, and responding to economic fluctuations was a key theme in the interviews.

#### **5.4 Performance of the Hospitality Industry in Zambia (2020-2022)**

This section analyses the performance of Zambia's hospitality industry during the COVID-19 pandemic, spanning from 2020 to 2022. This analysis is crucial to understand how the industry navigated through the unprecedented challenges posed by the pandemic. The insights for this section are derived from interviews conducted with key figures in the Ministry of Tourism and Arts, as well as from relevant industry data during this period.

##### **5.4.1 Respondents**

The insights from various officials at the Ministry of Tourism and Arts offer a comprehensive view of the challenges and adaptations faced by the hospitality industry during the COVID-19 pandemic. Their perspectives are critical in understanding the industry's response to the pandemic's challenges and the subsequent recovery efforts. To encapsulate these insights,

Table 5.5 is presented below, which summarizes the thematic analysis of the interview responses focusing on the pandemic's impact on the industry and the post-pandemic recovery efforts.

*Table 5.5: Thematic Analysis of the Performance of the Hospitality Industry in Zambia (2020-2022)*

<b>Theme</b>	<b>Description</b>
Decline in Revenue and Occupancy	Multiple respondents consistently indicated a significant decrease in revenue and occupancy rates. Key phrases that capture this sentiment include "loss of revenue," "low occupancy levels," and "decline in bookings," suggesting a widespread impact across the industry. For example, a respondent highlighted a notable "decline in revenue" directly linked to reduced tourist arrivals and occupancy rates.
Operational Challenges	The industry encountered substantial operational challenges, as reflected in the responses. Common themes included "travel restrictions and lockdowns," "employee layoffs and job losses," and "financial strain." These challenges were not isolated incidents but a widespread issue, impacting various aspects of the hospitality sector in Zambia.
Gradual Improvement	By 2022, respondents observed signs of recovery within the industry. This improvement is captured in descriptions of increased "bookings and occupancy rates," suggesting a rebound from the pandemic's peak impact. For instance, one respondent mentioned a gradual return to pre-pandemic occupancy levels, indicating a positive trend in the industry's recovery.
Continued Focus on Health and Safety	There was a sustained emphasis on health and safety protocols, as indicated by the ongoing measures implemented across the hospitality sector. This focus aimed to reassure travellers and regain consumer confidence, which was essential for the industry's recovery. A respondent specifically pointed out the continued importance of maintaining health standards to ensure the safety of both guests and staff, underscoring its role in the industry's gradual recovery.

The thematic analysis summarized in Table 5.5 sheds light on the profound impact of the COVID-19 pandemic on Zambia's hospitality industry between 2020 and 2022. It reveals a significant decline in both revenue and occupancy rates across the sector, underlined by phrases such as "loss of revenue" and "low occupancy levels." This downturn was a direct consequence of reduced tourist arrivals and bookings, indicating a widespread challenge that spanned the entire industry. Additionally, the sector grappled with various operational challenges, including stringent travel restrictions, workforce layoffs, and financial strains, all of which compounded the industry's difficulties during the pandemic.

By 2022, however, there were noticeable signs of recovery. This improvement was evident in the gradual increase in bookings and occupancy rates, suggesting a rebound from the pandemic's peak impact. The sustained focus on health and safety protocols played a crucial role in this recovery process. These measures were key to rebuilding consumer confidence and ensuring the safety of both guests and staff, thus facilitating the industry's gradual path to recovery. The insights from the interviews underscore the resilience of Zambia's hospitality industry in the face of unprecedented challenges and its adaptive strategies towards post-pandemic recovery.

#### 5.4.2 Analysis of Tourism Statistical Digests

This sub section evaluates the performance of Zambia's hospitality industry during the COVID-19 pandemic, from 2020 to 2022. It synthesizes information from the Tourism Statistical Digests against the backdrop of the pandemic's global impact as reported by the United Nations World Tourism Organisation (UNWTO). The focus is on how the pandemic influenced various aspects of the industry, including international tourist arrivals, room occupancy rates, and other relevant indicators. The COVID-19 pandemic resulted in unprecedented challenges for the global tourism sector, with Zambia being no exception. The analysis in table 7 offers insights into these challenges.

Table 5.6: Performance Indicators of Zambia's Hospitality Industry (2020-2022)

Indicator	2021 Data	Change from 2020	Change from 2019
International Tourist Arrivals	554,290	↑10.5%	↓56.2%
Visitations to National Parks	47.8% increase	↑47.8%	N/A
Tourist Visits to Waterfalls	145,192	↑39.7%	N/A
Average Room Occupancy Rate	38.4%	↑	N/A
Tourism contribution to GDP	5.8%	↑ from 4.7%	N/A

Key Observations:

- Recovery in International Tourist Arrivals: There was an increase of 10.5% in international tourist arrivals in 2021 compared to 2020, signalling a recovery trend. However, this figure was still significantly lower (56.2% decrease) compared to pre-pandemic levels in 2019.

- **Growth in Domestic Tourism Activities:** The visitations to national parks and waterfalls saw considerable increases in 2021, indicative of a shift towards domestic tourism during the pandemic.
- **Room Occupancy Rates:** The average room occupancy rate saw an improvement in 2021, indicating gradual recovery. This improvement is a positive sign for the hospitality sector.
- **Contribution to GDP:** Tourism's contribution to Zambia's GDP increased to 5.8% in 2021, up from 4.7%, suggesting a resilience and gradual recovery of the industry.

The data suggests a challenging period for Zambia's hospitality industry during the pandemic, particularly in terms of international tourist arrivals. However, the increase in domestic tourism activities and the sector's contribution to the GDP in 2021 point to adaptive responses within the industry. This resilience is key to overcoming global disruptions and highlights the need for diversifying tourism offerings and strengthening domestic tourism.

### 5.4.3 Synthesis of the findings

This subsection synthesizes the findings related to the second objective, assessing the performance of Zambia's hospitality industry during the COVID-19 pandemic from 2020 to 2022. It integrates insights from interviews with officials at the Ministry of Tourism and Arts and quantitative data from the Tourism Statistical Digests, providing a holistic view of the industry's response to the pandemic's challenges.

*Table 5.7: Consolidated Findings from Interviews and Statistical Analysis (2020-2022)*

<b>Aspect</b>	<b>2020-2021 Statistical Data</b>	<b>Interview Insights</b>
International Tourist Arrivals	2020: 501,606, 2021: 554,290, Change: ↑10.5% from 2020, ↓56.2% from 2019	Respondents consistently indicated a significant decrease in arrivals, with recovery signs in 2021.
Domestic Tourism Activities	National Park visitations: ↑47.8%, Waterfall visits: ↑39.7%	Not directly addressed, but suggests a shift towards domestic tourism during the pandemic.
Room Occupancy Rates	2021: 38.4%, Change: ↑ from 2020	Indicative of gradual recovery in the hospitality sector, aligning with respondents' observations of increased bookings.
Tourism Contribution to GDP	2021: 5.8%, Change: ↑ from 4.7% in 2020	Reflects the resilience and gradual recovery of the industry, despite the challenges faced.

Operational Challenges	N/A	Substantial operational challenges including travel restrictions, employee layoffs, and financial strain were highlighted by respondents.
Health and Safety Focus	N/A	Continued emphasis on health and safety protocols, crucial for reassuring travellers and aiding recovery.

The synthesis reveals a multifaceted scenario for Zambia's hospitality industry during the pandemic. The industry witnessed a dramatic decline in international tourist arrivals, which was consistent with the global downturn in tourism. However, there was a notable recovery in 2021, though the figures remained significantly lower than pre-pandemic levels. This recovery trend aligns with interview responses highlighting improvements in occupancy rates and increased bookings.

The data on domestic tourism activities, such as increased visitations to national parks and waterfalls, suggests a strategic pivot to domestic tourism, compensating for the loss of international travellers. This shift underlines the industry's adaptability in response to international travel restrictions. The increase in tourism's contribution to GDP in 2021 is an encouraging sign, indicating the sector's resilience and its role in the broader economic landscape of Zambia. However, the interviews paint a picture of significant operational challenges faced by the industry, including stringent travel restrictions, workforce issues, and financial hardships. The sustained focus on health and safety protocols, as emphasized by interviewees, was key to rebuilding consumer confidence and played a crucial role in the industry's gradual recovery. These measures were essential not only for the safety of guests and staff but also for the sector's overall rebound.

## **5.5 Analysis of Response Strategies to COVID-19**

This section provides an in-depth analysis of the response strategies implemented by Zambia's hospitality industry to address the challenges posed by the COVID-19 pandemic from 2020 to 2022. The focus is on evaluating the effectiveness and impact of various measures taken during this unprecedented crisis. The insights for this analysis are gleaned from interviews with key personnel in the Ministry of Tourism and Arts, complemented by data and reports pertaining to the industry during the pandemic.

### **5.5.1 Respondents**

The pandemic necessitated immediate and effective response strategies to mitigate its impact on the hospitality industry. The Zambian government, in collaboration with industry stakeholders, implemented a range of measures aimed at managing the crisis. To understand the scope and effectiveness of these strategies, Table 5.8 is presented, summarizing the thematic analysis of the government response measures and their perceived effectiveness based on interview responses.

*Table 5.8: Thematic Analysis of Government Response Measures to COVID-19 in Zambia's Hospitality Industry*

<b>Theme</b>	<b>Description</b>	<b>Effectiveness</b>
Health and Safety Protocols	Implementation of strict health and safety guidelines, including social distancing, face masking, hand sanitizing, and COVID-19 safety protocols.	Mixed Effectiveness (3-4 out of 5)
Travel Restrictions and Protocols	Adoption of travel restrictions and protocols, including testing and quarantine for travellers, to manage virus spread.	Mixed Effectiveness (3-4 out of 5)
Tourism Data and Research	Continuous monitoring of tourism data and conducting research to understand changing traveller preferences and market trends.	Mixed Effectiveness (3-4 out of 5)
Promotion of Domestic Tourism	Encouraging domestic tourism to stimulate local demand and establish travel corridors with neighbouring countries.	Mixed Effectiveness (3-4 out of 5)
Financial and Policy Support	Provision of stimuli packages, suspension of statutory fees, and advocacy to support the industry financially and policy-wise.	Mixed Effectiveness (3-4 out of 5)
Post-Pandemic Objectives: Health and Safety Assurance	Continued prioritization of health and safety protocols in the post-pandemic period.	Higher Effectiveness (4-5 out of 5)
Post-Pandemic Objectives: Infrastructure and Quality Improvement	Enhancing tourism infrastructure and improving the overall visitor experience.	Higher Effectiveness (4-5 out of 5)
Post-Pandemic Objectives: Digital Transformation and Cultural Promotion	Supporting digital transformation and initiatives highlighting local culture and traditions.	Higher Effectiveness (4-5 out of 5)

During the Pandemic: The government implemented various measures like health protocols, travel restrictions, and promotion of domestic tourism. These were rated as moderately effective, suggesting a partial success in mitigating the pandemic's impact.

Post-Pandemic Period: Strategies focused on health and safety assurance, infrastructure improvement, and digital transformation, receiving higher effectiveness ratings. This indicates a more successful impact on recovery and resilience of the industry post-pandemic.

### 5.5.2 Analysis of Government Statutory Instruments

This subsection focuses on critically analysing the Government Statutory Instruments related to the Tourism and Hospitality Act of Zambia, particularly those issued in the year 2020. These instruments were enacted as a response to the challenges posed by the COVID-19 pandemic, aiming to amend or supplement the existing Tourism and Hospitality Act (Act No. 13 of 2015) and its associated Regulations from 2016. The analysis here is aimed at understanding the implications of these statutory changes on the tourism and hospitality sector in Zambia.

Table 5.9: Analysis of 2020 Government Statutory Instruments in Zambia's Hospitality Sector

<b>Statutory Instrument</b>	<b>Description</b>	<b>Implications for the Hospitality Sector</b>
SI No. 124 of 2020	The Tourism and Hospitality (Licensing) (Amendment) Regulations, 2020 - Introduction of a flexible option for the annual retention fee payment.	This amendment potentially eases financial burdens on hospitality businesses by offering more flexible fee payment options.
SI No. 121 of 2020	The Tourism and Hospitality (Tourism Levy) (Amendment) Regulations, 2020 - Imposition of a penalty for under-reporting the tourism levy.	The penalty aims to enhance compliance and ensure fair revenue collection from the tourism sector.
SI No. 122 of 2020	The Tourism and Hospitality (Licensing) (Temporary Disapplication of Renewal and Retention Fee) Regulations, 2020 - Suspension of license renewal and retention fees for 2021.	This relief measure is designed to support the financial recovery of tourism businesses during the pandemic.
SI No. 123 of 2020	The Tourism and Hospitality (Registration of Hotel Managers) (Temporary Disapplication of Registration Fee) Regulations, 2020 - Suspension of registration fees for hotel managers for 2021.	Aims to alleviate financial strain on hotel management, facilitating smoother operations in a challenging economic climate.

The analysis of the 2020 Government Statutory Instruments reveals a strategic approach by the Zambian government to support the hospitality sector during the COVID-19 crisis. The amendments and suspensions introduced in these instruments were geared towards providing financial relief and ensuring compliance within the industry. These changes reflect the

government’s recognition of the pandemic's profound impact on tourism and hospitality, and its efforts to mitigate these effects.

The implications of these statutory instruments are significant, as they directly influence the operational and financial aspects of the hospitality sector in Zambia. By introducing more flexible fee options, imposing penalties for non-compliance, and temporarily suspending certain fees, the government aimed to balance the need for industry support with the necessity of maintaining regulatory standards and revenue collection. These measures likely played a crucial role in helping the sector navigate through the economic challenges posed by the pandemic.

### 5.5.3 Synthesis of the findings

This subsection synthesizes the findings related to the third objective, evaluating the response strategies implemented by Zambia's hospitality industry during the COVID-19 pandemic from 2020 to 2022. The synthesis integrates insights from interviews with officials at the Ministry of Tourism and Arts and the analysis of Government Statutory Instruments, offering a comprehensive view of the industry's response to the challenges posed by the pandemic.

*Table 5.10: Consolidated Findings from Interviews and Government Statutory Instruments Analysis (2020-2022)*

<b>Aspect</b>	<b>Government Response Measures</b>	<b>Interview Insights</b>	<b>Statutory Instruments Analysis</b>
Health and Safety Protocols	Implementation of health and safety guidelines.	Emphasis on maintaining health standards for guest and staff safety.	Supported by legal frameworks ensuring compliance.
Travel Restrictions and Protocols	Adoption of travel restrictions and protocols.	Mixed responses regarding effectiveness in controlling the pandemic spread.	Legal measures to facilitate safe and regulated travel.
Tourism Data and Research	Monitoring tourism data and conducting research.	Importance highlighted for adapting to market trends.	N/A

Promotion of Domestic Tourism	Encouraging domestic tourism.	Seen as a key strategy for sustaining the industry.	N/A
Financial and Policy Support	Provision of stimuli packages and policy support.	Recognized as crucial for industry survival during the pandemic.	Statutory instruments like SI No. 122 and 123 provided financial relief.
Post-Pandemic Recovery	Focus on health and safety, infrastructure improvement, and digital transformation.	Recovery strategies rated highly effective.	Statutory changes reflect a shift towards long-term industry resilience.

The synthesis reveals the multifaceted response of Zambia's hospitality industry to the COVID-19 pandemic. The implementation of health and safety protocols was a central aspect of the response, with an emphasis on ensuring the safety of both guests and staff. This approach was supported by the government through various statutory instruments that provided a legal backbone for these measures.

The promotion of domestic tourism emerged as a crucial strategy to sustain the industry during the period of restricted international travel. This shift towards domestic tourism was a notable adaptation to the pandemic-induced challenges.

The financial and policy support provided by the government, including stimuli packages and the suspension of certain statutory fees, played a significant role in aiding the industry's survival during the pandemic. The effectiveness of these measures was reflected in the gradual recovery observed in the post-pandemic period, as highlighted in the interviews.

In the post-pandemic recovery phase, the focus on health and safety assurance, infrastructure improvement, and digital transformation was viewed as highly effective. These strategies were instrumental in facilitating the industry's recovery and enhancing its resilience.

## 5.6 Summary of Key Findings

The comprehensive analysis of Zambia's hospitality industry from 2015 to 2022 provides critical insights into its performance, challenges, and responses during both pre-pandemic and pandemic periods. This summary encapsulates the key findings across different phases,

integrating time-series analysis, thematic insights from interviews, and statistical data. Table 5.11 illustrates the critical points of the hospitality industry's journey.

*Table 5.11: Summary of Key Findings*

<b>Category</b>	<b>Key Points</b>
Pre-Pandemic Performance (2015-2019)	Growth Trends: Notable growth with increasing international tourist arrivals, occupancy rates, and revenue. Expansion in tourism offerings. Economic Influence: Tied to Zambia's economic conditions, showing resilience. Government Objectives: Focused on elevating industry standards, infrastructure development, and tourism diversification.
Pandemic Impact (2020-2022)	Decline in Tourism: Significant decrease in tourist arrivals, revenue, and occupancy rates. Operational Challenges: Travel restrictions, employee layoffs, financial strain, health concerns.
Response Strategies (2020-2022)	Government Response Measures: Health and safety protocols, travel restrictions, promotion of domestic tourism, financial support. Mixed effectiveness. Post-Pandemic Recovery: Signs of recovery by 2022 with focus on health and safety assurance, infrastructure improvement, and digital transformation.

#### Time Series Analysis (2015-2022)

The time series analysis provides a quantitative perspective, tracing key metrics through the years to illustrate the industry's trajectory. It examines tourist arrivals, occupancy rates, domestic tourism activities, and economic contribution from 2015 to 2022, highlighting trends and shifts influenced by both internal dynamics and external factors such as the COVID-19 pandemic.

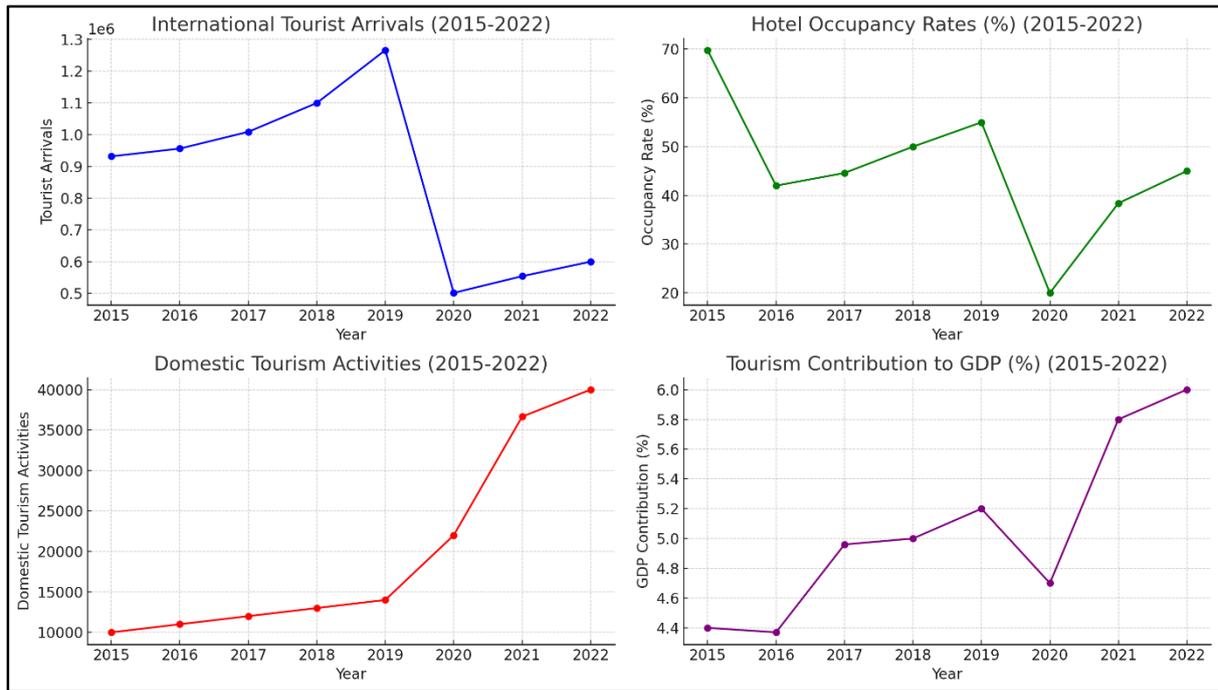


Figure 5.4: Time Series Analysis (2015-2022)

Key Observations:

- Tourist Arrivals: Steady growth from 2015 to 2019, followed by a drastic decline in 2020 and 2021.
- Occupancy Rates: Witnessed fluctuations, with a significant dip during the pandemic, and a slow recovery phase in 2021.
- Domestic Tourism: Marked increase in activities like national park visits, suggesting a pivot towards domestic tourism during the pandemic.
- Economic Contribution: Despite challenges, the industry's contribution to GDP showed an upturn in 2021, indicating resilience.

The time series analysis underlines the profound impact of the pandemic, disrupting a period of growth and forcing a strategic shift within the industry. Despite the decline in international arrivals and occupancy rates, the industry showed adaptability, emphasizing domestic tourism and contributing positively to the GDP in 2021. This resilience is a testament to the sector's capacity to adjust and recover, highlighting the importance of flexibility and innovation in the face of global crises.

## **5.8 Conclusion**

This chapter has systematically outlined the multifaceted dynamics of Zambia's hospitality industry from 2015 to 2022. The chapter has navigated through various phases of the industry from pre-pandemic growth and diversification to the profound impacts of the COVID-19 pandemic and the responsive strategies that emerged. The integration of time-series analysis, interview insights, and statistical data has provided a comprehensive understanding of the industry's trajectory. Key findings indicate a sector that experienced robust growth and diversification before the pandemic, faced significant challenges during it, and demonstrated resilience and adaptability in its recovery phase. As we transition to Chapter 5, the focus will shift to discussing these findings in depth. This next chapter will delve into analyzing the implications of these findings, discussing how the strategies adopted by the industry and government interventions have shaped the current state and future prospects of Zambia's hospitality sector. The discussion will also consider the broader context of the global tourism industry, drawing parallels and distinctions where relevant.

## CHAPTER 6

### DISCUSSION OF THE FINDINGS

#### 6.1 Introduction

This chapter is dedicated to discussing the findings of the study, the primary purpose here is to interpret and analyse these findings in depth, connecting them with the specific objectives outlined at the beginning of this research. Each section of this chapter is aligned with a specific objective, ensuring a structured and focused discussion. The aim is to delve into the nuances of the hospitality industry's performance before and during the COVID-19 pandemic, and to critically evaluate the response strategies implemented during this challenging period thereby providing a comprehensive understanding of the industry's dynamics, challenges, and resilience in the face of unprecedented global changes.

#### 6.2 Assessing Performance of the Hospitality Industry in Zambia (2015-2019)

The period from 2015 to 2019 marked a significant phase in the evolution of Zambia's hospitality industry. This analysis delves into the growth trends, economic influences, and government policies that shaped the industry, while comparing these findings with global trends and literature. Between 2015 and 2019, Zambia's hospitality industry experienced substantial growth, with a consistent increase in international tourist arrivals. The data from the Tourism Statistical Digests reveal a year-on-year increase in arrivals: 931,782 in 2015, 956,332 in 2016, and reaching 1,009,173 by 2017. This growth trajectory is a clear indicator of Zambia's rising popularity as a tourist destination. The growth was not limited to numbers alone; there was a qualitative expansion in tourism offerings, with a shift towards cultural, adventure, and heritage tourism. This diversification strategy mirrored global trends, as discussed in the literature review, where a similar expansion in tourism offerings was observed worldwide, driven by changing traveller preferences for more diverse and authentic experiences. The emphasis on diversification was evident from the interview responses, where officials highlighted efforts to expand tourism beyond traditional wildlife tourism. This strategic move aligns with global trends, such as those noted by Bieger et al. (2016), where the global tourism industry was seen to evolve in response to emerging market demands for unique travel experiences.

Despite facing economic fluctuations, Zambia's hospitality industry showed resilience, as evident from increasing profits and revenue. This resilience is reflected in the continual rise in

tourism earnings, with 2015 seeing K4.4 billion and an increase to K4.96 billion by 2017. The industry's performance was closely linked to Zambia's broader economic conditions, demonstrating an adaptable nature. This trend of resilience and growth in the face of economic challenges parallels global patterns. The WTTC (2020) reported that the global tourism sector's contribution to GDP consistently increased, despite economic uncertainties, highlighting the sector's significant role in the global economy.

The Zambian government's role was pivotal in shaping the industry's growth trajectory. The focus on meeting international standards, infrastructure development, and quality assurance were key government objectives during this period. These objectives resonated with the global best practices in tourism development. For instance, infrastructure development in Zambia, aimed at improving accessibility and enhancing the visitor experience, is a common theme in global tourism strategies. The government's emphasis on quality assurance and promoting tourism diversification was aligned with the global trend towards enhancing service quality and offering a wide range of tourism products to attract a diverse tourist demographic. The positive growth and diversification observed in Zambia's hospitality industry are reflective of global trends. The UNWTO (2019) report showed a similar increase in international tourist arrivals worldwide, indicating a global upsurge in travel interest. Additionally, the emphasis on diversification in Zambia mirrors the global shift towards offering varied tourism experiences, catering to the evolving preferences of travellers.

### **6.3 Assessing Performance of the Hospitality Industry in Zambia (2020-2022)**

The years 2020 to 2022 heralded unprecedented challenges for Zambia's hospitality industry, primarily attributable to the COVID-19 pandemic. This critical period necessitated a closer examination of the sector's response to the pandemic, including the impacts, challenges, and recovery strategies. The COVID-19 pandemic severely disrupted Zambia's hospitality sector, mirroring a global crisis. Interviews conducted with officials from the Ministry of Tourism and Arts painted a stark picture of the situation. There was a noticeable decline in key performance indicators such as revenue and occupancy rates. This mirrored global trend reported by the United Nations World Tourism Organization (UNWTO, 2020), which indicated a 73% fall in international tourist arrivals. In Zambia, the impact was acutely felt, with 2020 witnessing a sharp decline in tourist arrivals, plummeting by 56.2% from the previous year. This reduction had a cascading effect on revenue, contributing to the global tourism sector's loss of approximately \$1.3 trillion in export revenues. This phase marked one of the most challenging

periods in the history of global tourism, with the pandemic affecting travel and hospitality more severely than any other economic crisis.

The operational challenges faced by Zambia's hospitality sector were multi-faceted. The imposition of travel restrictions and lockdowns curtailed movement significantly, directly impacting tourist influx and hotel operations. The interviewees highlighted substantial financial strain and employee layoffs, a scenario echoed globally, where the World Travel & Tourism Council (WTTC, 2021) reported a loss of 62 million jobs in the sector. These challenges were reflective of a broader global context, underscoring the hospitality industry's vulnerability to external shocks such as pandemics.

Despite the challenges, by 2022, Zambia's hospitality industry began showing signs of recovery. This was evidenced by increased bookings and occupancy rates, suggesting a gradual rebound from the pandemic's peak impact. A key component of this recovery was the rigorous implementation of health and safety protocols. These measures were in line with the global shift towards 'hygiene tourism,' emphasizing the paramount importance of cleanliness and safety in regaining consumer confidence, as highlighted by Gursoy et al. (2020). The adaptation to digital technologies and the introduction of contactless services played a pivotal role in the recovery process. As reported by Deloitte (2021), these innovations were crucial in adapting to the new normal, allowing the industry to navigate the challenges posed by the pandemic. In Zambia, similar strategies, including infrastructure improvements and digital transformation initiatives, were instrumental in fostering the industry's resilience and facilitating its gradual recovery. These adaptations mirrored global trends, where hospitality businesses leveraged technology and innovation to stay afloat and meet evolving consumer expectations.

The resilience of Zambia's hospitality industry was noteworthy. In the face of adversity, the sector managed to increase its contribution to the GDP from 4.7% in 2020 to 5.8% in 2021. This uptrend, amidst the challenges posed by the pandemic, underscores the industry's capability to adapt and recover. This resilience was not unique to Zambia but was reflective of global trends, as the hospitality industry worldwide endeavoured to overcome the disruptions caused by COVID-19.

#### **6.4 Analysis and Evaluation of Response Strategies**

The impact of COVID-19 on Zambia's hospitality industry called for a multifaceted response from the government and industry stakeholders. This section discusses these responses, contrasting them with global trends and practices highlighted in chapter 2, literature review.

During the pandemic, the Zambian government implemented a range of strategies, including health and safety protocols, travel restrictions, and the promotion of domestic tourism. These measures were essential in managing the immediate effects of the pandemic. Health and safety protocols, though rated with mixed effectiveness, were crucial for minimizing virus spread and align with global trends towards prioritizing health in the hospitality sector (Gursoy et al., 2020). The mixed effectiveness can be attributed to challenges in enforcement and public adherence, a common issue worldwide. Travel restrictions, while necessary for controlling the pandemic, had a profound impact on international tourist arrivals, mirroring the global scenario of a sharp decline in travel (UNWTO, 2020). This response highlights a critical tension in pandemic management: balancing public health concerns with economic impacts. The promotion of domestic tourism was a strategic pivot to sustain the industry amid restricted international travel. This aligns with global trends where countries have turned to domestic markets to buffer the impacts of lost international tourism (Deloitte, 2021). However, the moderate success of this strategy in Zambia indicates the significant role international tourism plays in the country's hospitality sector.

The Zambian government's amendments and suspensions of statutory instruments in 2020 provided financial relief to the industry. These measures, including flexible fee options and suspensions of certain fees, were critical for alleviating financial strain on businesses. This approach is reflective of global practices where governments intervened to support industries through fiscal measures (WTTC, 2021). However, the reliance on government support also underscores the vulnerability of the hospitality industry to external shocks like the pandemic.

The post-pandemic strategies in Zambia focused on health and safety assurance, infrastructure improvement, and digital transformation. The emphasis on health and safety is in line with global shifts towards hygiene tourism, where safety measures have become paramount in customer decision-making processes (Gursoy et al., 2020). Infrastructure improvements and digital transformation initiatives were crucial for the industry's recovery and resilience. The shift towards digital solutions, a trend accelerated by the pandemic (Deloitte, 2021), was evident in Zambia's hospitality sector as well. These strategies not only facilitated operational efficiency but also catered to evolving consumer preferences for contactless services and enhanced experiences. The resilience demonstrated by Zambia's hospitality industry, evidenced by the gradual recovery and adaptive strategies, reflects global patterns. The industry's ability to adjust to new realities, innovate in service delivery, and prioritize customer

safety has been vital. This resilience is mirrored in the sector's global response, where businesses have rapidly adapted to changing circumstances (Sigala et al., 2020).

The financial and policy support from the government played a significant role in this resilience. Such support measures have been critical globally in helping the hospitality industry withstand the pandemic's impacts (WTTC, 2021). The Zambian government's approach to balancing industry support with regulatory compliance reflects a nuanced understanding of both immediate and long-term industry needs.

## **6.5 Conclusion**

The examination of Zambia's hospitality industry from 2015 to 2022 reveals a sector profoundly impacted by global and local dynamics. Pre-pandemic, the industry experienced growth, driven by increased tourist arrivals and diverse tourism offerings. This period was marked by resilience in the face of economic fluctuations and a strategic emphasis on meeting international standards, as per government objectives. The advent of the COVID-19 pandemic in 2020 introduced unprecedented challenges. A significant decline in tourism, coupled with operational hurdles such as travel restrictions and financial strain, mirrored the global crisis in the hospitality sector. The Zambian government's response, including health and safety protocols and amendments to statutory instruments, reflects a commitment to mitigating these challenges, although with varied effectiveness. The post-pandemic recovery phase saw a shift towards health and safety assurance, digital transformation, and infrastructure improvement. These strategies, crucial in navigating the path to recovery, highlight the industry's adaptability and resilience. Therefore, Zambia's hospitality industry's journey through these years underscores the sector's ability to navigate challenges, adapt to changing environments, and remain resilient in the face of global crises. This resilience, supported by strategic government interventions and industry innovations, positions the sector for continued growth and adaptation in the post-pandemic era.

## CHAPTER 7

### CONCLUSION AND RECOMMENDATIONS

#### 7.1 Introduction

This chapter marks the culmination of an extensive study focused on the performance of Zambia's hospitality industry, spanning from 2015 to 2022. The research primarily aimed to assess the industry's trajectory and resilience, particularly during the period of the COVID-19 pandemic. Employing a mixed-method approach, the study integrated quantitative data from tourism statistical digests with qualitative insights obtained through interviews with key figures in the Ministry of Tourism and Arts. This holistic approach facilitated a comprehensive understanding of the industry's dynamics, challenges, and adaptive strategies during both the pre-pandemic and pandemic periods. In this final chapter, the findings are synthesized to draw conclusive insights and forward-looking recommendations. These conclusions and recommendations are intricately aligned with the study's objectives, offering a contextualized perspective that not only reflects on the industry's past and present but also casts an eye towards its future in the evolving global tourism landscape.

#### 7.2 Conclusion

This research into Zambia's hospitality industry unravelled a multifaceted trajectory of progress, decline and gradual revival between 2015 to 2022 as the sector charted through pre-pandemic growth, COVID-induced adversity and its contested recovery.

Investigating the first objective, the period from 2015-2019 was marked by notable expansion and performance gains. Quantitative metrics showed consistent improvement in indicators like tourist arrivals, occupancy rates and earnings, validated through stakeholder accounts of rising revenue and strategic drive towards tourism diversification. Government policies emphasizing infrastructure upgrades and aligning to global quality standards provided an enabling backdrop for growth upturn. The industry exhibited resilience despite some economic fluctuations.

However, the pandemic period of 2020-2022 upended positive momentum causing significant performance drops, mirroring global tourism decline. Analysis revealed decreased tourist numbers and hospitality earnings besides operational struggles from lockdown constraints to

workforce and supply chain disruptions. Though the crisis was unavoidable, findings suggest certain risks could have been mitigated through pre-emptive planning. Government interventions providing financial relief and maintaining regulatory standards helped curb further deterioration. The recovery phase has shown gradual upticks in key indices since 2022 like tourist numbers and occupancy rates as well as sector GDP contributions, indicating strengthened resilience.

Evaluating response strategies as per the third objective, immediate health protocols, travel restrictions and promoting domestic tourism attained moderate outcome effectiveness. But post-pandemic efforts on digitization, infrastructure building and fostering local tourism are proving successful for long-term robustness. Sustaining these would cement responsive readiness against future exigencies. Overall, the research traced the industry's journey through a Black Swan event, revealing policy anchors and strategic reorientation that buffered the worst impacts and attempting to better pivot the sector. Insights gained on crisis navigation and resilience-building can inform tourism ecosystems globally.

### **7.3 Recommendations**

Based on the comprehensive analysis of Zambia's hospitality industry, several strategic recommendations emerge. These recommendations are tailored to align with the government's objectives and the evolving needs of the industry. The focus is on enhancing resilience, ensuring sustainable growth, and adapting to global trends.

#### **Public-Private Partnership Models (PPPs)**

Public-Private Partnerships (PPPs) can play a pivotal role in enhancing Zambia's hospitality sector, particularly in terms of infrastructure development, service quality improvement, and exploring new tourism markets. These partnerships, bringing together the innovation and efficiency of the private sector with the public sector's strategic oversight and regulatory support, are key to advancing the industry. The benefits of PPPs are multifaceted, including shared risks in large-scale investments, improved resource allocation, and fostering innovative solutions crucial for significant tourism projects. The long-term impact of implementing PPPs lies in boosting Zambia's tourism profile, attracting more international tourists, and ensuring sustainable growth within the hospitality sector. This approach will contribute significantly to the national economy and solidify Zambia's status as a competitive tourism destination.

#### **Market Diversification and Niche Tourism Development**

The strategy of market diversification and the development of niche tourism segments is essential for the resilience of Zambia's hospitality industry. By focusing on niche markets such as, cultural tourism and adventure tourism, Zambia can cater to specific tourist interests and attract a diverse group of travellers. This strategy is especially pertinent considering the potential of underexplored destinations like the Lower Zambezi, Lake Bangweulu in Samfya District, Lake Tanganyika in Mpulungu, and Musonda Falls. Additionally, promoting unique cultural events such as the Kuomboka Ceremony in Western Province can enhance the appeal of Zambia's cultural tourism. Diversifying the market helps mitigate the risks associated with over-reliance on traditional tourism models and opens up new revenue streams. It also aligns with evolving tourist preferences and contributes to the preservation of cultural and natural heritage. In the long term, a focus on niche tourism will help establish Zambia as a distinct destination, leading to sustainable growth, increased tourist arrivals from different segments, and enhanced global competitiveness. It fosters community participation and economic development at the local level, ensuring widespread benefits from the tourism industry.

## REFERENCES

- Babar, Z., & Syed, J. (2019). Essential Micro-foundations for Contemporary Business Operations: Top Management Tangible Competencies, Relationship-based Business Networks and Environmental Sustainability. *British Journal of Management*, 30(1), 106-129.
- Bakar, N. A., Rosbi, S., & Uzaki, K. (2020). Effect of Coronavirus disease (COVID-19) to tourism industry. *International Journal of Advanced Engineering Research and Science*, 7(4), 189-193.
- Barton, L. (1993). *Crisis in Organizations: Managing and Communicating in the Heat of Chaos*. Cincinnati, OH: College Divisions South-Western.
- Barton, L. (2001). *Crisis in Organizations II*. Cincinnati: College Divisions South-Western.
- Boin, A., Stern, E., & Sundelius, B. (2016). *The Politics of Crisis Management: Public Leadership under Pressure*. Cambridge: Cambridge University Press.
- Brouder, P., Teixeira, R., & Ioannides, D. (2020). Urban tourism in the post-COVID-19 world. In *Tourism in the City* (pp. 221-230). Springer, Cham.
- Cerullo, V., & Cerullo, M.J. (2004). Business Continuity Planning: A Comprehensive Approach. *Information Systems Management*, 21(3), 70-78.
- Coombs, W.T. (2014). *Ongoing Crisis Communication: Planning, Managing and Responding*. Thousand Oaks: SAGE publications.
- Creswell, J. W., & Creswell, J. D. (2017). *Research design: Qualitative, quantitative, and mixed methods approaches*. Sage publications.
- Creswell, J.W and Poth, C.N. (2018). *Qualitative Inquiry and Research Design Choosing Among Five Approaches*. SAGE Publications.
- Farmaki, A., Kaniadakis, A., & Stergiou, D. (2020). Navigating the COVID-19 pandemic crisis: Destination management organisations and stakeholder response. *Current Issues in Tourism*, 1-14.
- Faulkner, B. (2001). Towards a Framework for Tourism Disaster Management. *Tourism Management*, 22(2), 135-147.

- Faulkner, B., & Vikulov, D. (2019). Crisis management in tourism. *Journal of Travel Research*, 58(7), 1119-1132. <https://doi.org/10.1177/0047287518790954>
- Fink, S. (1986). *Crisis Management: Planning for the Inevitable*. New York: AMACOM.
- Fusch, P.I. & Ness, L.R. (2015). Are we there yet? Data saturation in qualitative research. *The Qualitative Report*, 20(9), 1408-1416.
- Gössling, S., Scott, D., & Hall, C. M. (2020). Pandemics, tourism and global change: a rapid assessment of COVID-19. *Journal of Sustainable Tourism*, 1-20.
- Gursoy, D., Chi, C. G. Q., Lu, L., & Nunkoo, R. (2020). Antecedents and outcomes of travellers' information-seeking behavior in the context of COVID-19. *Journal of Travel Research*, 0047287520931596.
- Jaques, T. (2007). Issue management and crisis management: An integrated, non-linear, relational construct. *Public Relations Review*, 33(2), 147-157.
- Kang, L., Li, Y., Hu, S., Chen, M., Yang, C., Yang, B. X., ... & Xiang, Y. T. (2020). The mental health of medical workers in Wuhan, China dealing with the 2019 novel coronavirus. *The Lancet Psychiatry*, 7(3), e14.
- Kaushik, V. & Walsh, C.A. (2019). Pragmatism as a Research Paradigm and Its Implications for Social Work Research. *Social Sciences*, 8(9), 255.
- Knutson, B. J., Na, H., & Kline, S. F. (2020). *Managing Hospitality and Tourism Experiences in the New Normal: Best Practices for Providing a Safe and Clean Environment*. *Worldwide Hospitality and Tourism Themes*.
- Kukanja, M., & Planinc, T. (2021). Innovative Behaviour, Job Satisfaction, Organizational Learning Culture and Crisis Leadership Competences in Slovenian Hospitality after the Outbreak of COVID-19. *European Journal of Tourism Research*, 29, 2903.
- Li, X., Wang, J., & Huang, J. (2020). Supply chain disruption of COVID-19: Evidence from the Wuhan city lockdown. *Journal of Business Research*, 117, 124-131.
- Liu, C. H., & Chen, Y. H. (2020). The impact of the COVID-19 pandemic on world tourism. *Journal of Travel Research*, 0047287520960151.
- Malterud, K., Siersma, V.D. and Guassora, A.D. (2015). Sample Size in Qualitative Interview Studies: Guided by Information Power. *Qual Health Res*, 26(13), pp.1753-1760.

- Ministry of Finance. (2020). Economic measures in response to the COVID-19 pandemic. Lusaka: Government of the Republic of Zambia. Retrieved from <https://www.mof.gov.zm>
- Mulenga, A. G., & Bwalya, J. K. (2020). Impact of COVID-19 on the Zambian hospitality industry. *International Journal of Tourism and Hospitality Research*, 4(7), 25-33.
- Mulusa, J. (2017). The impact of investment on the growth of the tourism sector in Zambia. *Journal of Tourism and Hospitality*, 6(4), 1-8.
- Neuhofer, B., Buhalis, D., & Ladkin, A. (2019). Technology as a catalyst of change: enablers and barriers of the tourist experience and their consequences. *The Routledge Handbook of Transport Economics*, 1(1), 1-15.
- Nicola, M., Alsafi, Z., Sohrabi, C., Kerwan, A., Al-Jabir, A., Iosifidis, C., ... & Agha, R. (2020). The socio-economic implications of the coronavirus pandemic (COVID-19): A review. *International Journal of Surgery*, 78, 185-193.
- Paraskevas, A., Altinay, L., McLean, J., & Cooper, C. (2013). Crisis Knowledge in Tourism: Types, Flows and Governance. *Annals of Tourism Research*, 41, 130-152.
- Pearson, C. M., & Clair, J. A. (1998). Reframing Crisis Management. *Academy of Management Review*, 23(1), 59-76.
- Pellegrini, M. M., & Ciappei, C. (2019). Organizational resilience: A capability-based conceptualization. *Business Process Management Journal*, 25(2), 354-370.
- Pfarr, C., & Hosie, P. J. (2008). Crisis Management in Tourism: Preparing for Recovery. *Journal of Travel & Tourism Marketing*, 23(2-4), 249-264.
- Quarantelli, E.L. (1988). Disaster Crisis Management: A Summary of Research Findings. *Journal of Management Studies*, 25(4), 373-385.
- Ritchie, B. W. (2004). Chaos, Crises and Disasters: A Strategic Approach to Crisis Management in the Tourism Industry. *Tourism Management*, 25(6), 669-683.
- Shrivastava, P. (1993). Crisis Theory/Practice: Towards a Sustainable Future. *Organization & Environment*, 7(1), 23-42.
- Sigala, M. (2020). Tourism and COVID-19: Impacts and implications for advancing and resetting industry and research. *Journal of Business Research*, 117, 312-321.

Sigala, M., Katsaris, M., Giousmpasoglou, C., & Zopiatis, A. (2020). The impact of COVID-19 on hospitality: Looking into the future. *Journal of Tourism and Hospitality Management*, 8(2), 15-22.

United Nations World Tourism Organization (UNWTO). (2019). *International tourism highlights, 2019 edition*. UNWTO Publications.

United Nations World Tourism Organization (UNWTO). (2020). *Impact assessment of the COVID-19 outbreak on international tourism*. UNWTO Publications.

Wang, J., & Ritchie, B. W. (2013). Attitudes and Perceptions of Crisis Planning Among Accommodation Managers: Results From an Australian Study. *Safety Science*, 52, 81-91.

World Travel & Tourism Council (WTTC). (2019). *Travel & Tourism Economic Impact 2019: World*. WTTC Publications.

World Travel & Tourism Council (WTTC). (2020). *Economic Impact Report 2020*. WTTC Publications.

Zambia Daily Mail. (2020). *Zambia's tourism sector faces uncertain future*. Retrieved from <https://www.daily-mail.co.zm/zambias-tourism-sector-faces-uncertain-future/>

Zambia Development Agency. (2021). *SME development*. Retrieved from <https://www.zda.org.zm/sme-development/>

Zambia Revenue Authority. (2021). *COVID-19 tax measures*. Retrieved from <https://www.zra.org.zm/news/covid-19-tax-measures/>

Zambia Tourism Agency. (2021). *Tourism performance report 2020*. Retrieved from [https://www.zambia.travel/images/Tourism\\_Performance\\_Report\\_2020.pdf](https://www.zambia.travel/images/Tourism_Performance_Report_2020.pdf)

## APPENDICES

### **Appendix I: Interview Questions Guide**

#### ***Interview Guide for Government Representatives from the Ministry of Tourism***

##### **Introduction**

Hello, my name is Olivia Mhango, and I'm conducting research on the impact of the COVID-19 pandemic on the hospitality industry in Zambia. We're interested in learning about the government's perspective on this issue, particularly the policies and measures implemented to support the industry. This interview should take approximately 35 minutes. Your participation is voluntary, and your responses will be kept confidential. Do you have any questions before we begin?

##### **Section 1: Background Information**

1. What is your current role in the Ministry of Tourism?
2. How long have you been working in this role?
3. Can you briefly describe your main responsibilities, particularly those related to the hospitality industry?

##### **Section 2: Performance Before COVID-19 (2015-2019)**

4. How would you describe the performance of the hospitality industry in Zambia from 2015 to 2019?
5. What are the Key performance indicators?
6. What were the Ministry's main objectives or priorities for the hospitality industry during this period?

##### **Section 3: Impact and Response to COVID-19 (2020-2022)**

6. Can you describe the major challenges the hospitality industry faced due to the COVID-19 pandemic?
7. What were the key policies or measures implemented by the Ministry of Tourism in response to these challenges?

8. On a scale of 1 (not effective) to 5 (very effective), how would you rate the effectiveness of these policies or measures in supporting the industry during the pandemic?

#### **Section 4: Performance and Adaptation After COVID-19 (2023)**

9. How has the hospitality industry's performance in 2023 been so far, and how does it compare to the pre-pandemic and pandemic periods?
10. What are the Ministry's current objectives or priorities for the hospitality industry in the post-pandemic period?
11. What strategies or measures are being taken to facilitate the recovery and resilience of the industry in the post-pandemic period?
12. On a scale of 1 (not effective) to 5 (very effective), how would you rate the effectiveness of these recovery strategies?

### ***Interview Guide for Representatives from the Zambia Tourism Agency***

#### **Introduction**

Hello, my name is Olivia Mhanga, and I'm conducting research on the impact of the COVID-19 pandemic on the hospitality industry in Zambia. Your perspective as a representative of the Zambia Tourism Agency is vital to understanding this issue. This interview should take approximately 35 minutes. Your participation is voluntary and your responses will be kept confidential. Do you have any questions before we begin?

#### **Section 1: Background Information**

1. What is your current role in the Zambia Tourism Agency?
2. How long have you been working in this role?
3. Can you briefly describe your main responsibilities, particularly those related to the hospitality industry?

#### **Section 2: Performance Before COVID-19 (2015-2019)**

4. How would you describe the performance of the hospitality industry in Zambia from 2015 to 2019?

5. What are the Key performance Indicators?
6. What were the Zambia Tourism Agency's main objectives or priorities for the hospitality industry during this period?

### **Section 3: Impact and Response to COVID-19 (2020-2022)**

6. Can you describe the major challenges the hospitality industry faced due to the COVID-19 pandemic?
7. What were the key strategies or measures implemented by the Zambia Tourism Agency in response to these challenges?
8. On a scale of 1 (not effective) to 5 (very effective), how would you rate the effectiveness of these strategies in supporting the industry during the pandemic?

### **Section 4: Performance and Adaptation After COVID-19 (2023)**

9. How has the hospitality industry's performance in 2023 been so far, and how does it compare to the pre-pandemic and pandemic periods?
10. What are the Zambia Tourism Agency's current objectives or priorities for the hospitality industry in the post-pandemic period?
11. What strategies or measures are being taken to facilitate the recovery and resilience of the industry in the post-pandemic period?
12. On a scale of 1 (not effective) to 5 (very effective), how would you rate the effectiveness of these recovery strategies?