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Research Article

Breaking Barriers: A Qualitative Study of the Socio-Economic Factors Shaping Education in Lukulu and Mitete Districts of Western Province in Zambia

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About Article

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ABSTRACT

This research investigates the influence of poverty, infrastructure, health, and gender norms on educational access in the rural districts of Lukulu and Mitete in Western Zambia. The study employs a qualitative, exploratory design utilizing interviews, focus groups, and document analysis with teachers, parents, traditional leaders, and learners, demonstrating that schooling is impeded by intersecting socio-economic barriers. Zambia has pledged to universal and inclusive education; however, concealed expenses (uniforms, examination fees, transportation), child labor requirements, overcrowded and inadequately equipped classrooms, insufficient sanitation, and persistent malnutrition persistently hinder enrollment, attendance, and educational outcomes. Girls must deal with early marriage, a lot of housework, and cultural norms that put boys' education first. The results demonstrate that the failure of education is not attributable to insufficient policy rhetoric, but rather to the structural erosion of children's right to learn due to economic pressures at the household level. The paper contends that integrated, community-driven solutions should amalgamate economic assistance, school nutrition programs, infrastructure development, and gender-transformative social reform. Providing meaningful educational equity in rural Zambia is both a duty to protect human rights and a way to boost the economy as ultimate goal of effective educational management.

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1. INTRODUCTION

Many people agree that education is a basic human right and an important way to improve society, promote equality, and help the country grow (UNESCO, 2015). But there are still big differences between cities and rural areas in Zambia. National data persistently indicate that literacy and school completion rates are markedly inferior in rural provinces compared to urban centers, highlighting profound structural disadvantages in access, resources, and learning conditions (Zambia Demographic and Health Survey [ZDHS], 2018). Western Province, home to Lukulu and Mitete, is one of the poorest areas in the country. About 79% of the people there live in poverty, and the area has some of the worst educational outcomes in the country (Civil Society for Poverty Reduction [CSPR] & Ministry of Finance, 2024; World Bank, 2025).

In these districts, the presence of a school is not the only thing that affects how easy it is to get to school. It depends on whether families can pay for uniforms and exam fees, whether kids are healthy and fed, whether a girl can stay in school instead of getting married, and whether the distance and terrain to school is easy to get to. These problems are made worse by climate shocks, seasonal food insecurity, and unstable jobs. More than one million rural Zambians go through severe food insecurity during lean seasons, which makes it hard for them to go to school and focus (Integrated Food Security Phase Classification [IPC], 2022).

This article examines the influence of socio-economic factors, such as poverty, child labor, inadequate infrastructure, health and nutrition challenges, and gender norms on educational access, participation, and quality in the Lukulu and Mitete Districts.

The article identifies the main obstacles to education in these areas, examines how people in these communities see these obstacles, and suggests a model for improving rural education systems in Zambia that considers the specific needs of each area. Further, the article ultimately provides an integrated, context-driven model for strengthening rural education systems in Zambia.

2. LITERATURE REVIEW

2.1. Socioeconomic status and access to education

Socio-economic status (SES), usually measured by income, job security, parental education, and material possessions, is a strong predictor of enrollment, attendance, and academic success (Sirin, 2005; Baker & Soler-Hernández, 2010). In rural Zambia, where most families depend on subsistence farming, fishing, or informal trade, education and survival are in direct competition with each other. Families often find it hard to pay for things like uniforms, stationery, exam fees, and transportation, even when tuition is technically free (CSPR & Ministry of Finance, 2024). When people are having trouble making ends meet, like when the harvest fails, the breadwinner gets sick, or fishing is banned, children are taken out of school to help with chores or save money (Hamilandu & Sikalumbi, 2025).

In places like Lukulu and Mitete, these pressures are even worse because they are so far away from other people. Younger kids and girls have a hard time going to school regularly because of seasonal flooding, long walks, and bad road access. These kinds of barriers help explain why rural Zambia has lower literacy and completion rates than urban Zambia (ZDHS, 2018; World Bank, 2025).

2.2. Infrastructure and the learning setups

Zambia's rural schools often don't have enough resources. Overcrowding is a common problem; classrooms that are meant for 30 to 40 students sometimes hold 70 or more, which makes it harder for teachers to pay attention, manage the classroom, and stay motivated (Chibwana & Mufune, 2018). In some rural districts, the ratio of students to teachers is still more than 80:1, which is about twice the Ministry of Education's recommendation of 40:1 for good teaching and classroom management (Ministry of Education, 2024; UNICEF Innocenti, 2025). Overcrowded conditions have been associated with diminished instructional time, increased disruptive behavior, and declining student motivation (Chibwana & Mufune, 2018).

In 2022, the Zambian government launched an unprecedented effort to hire teachers, bringing in more than 30,000 new teachers. This was about a 26% increase in the number of public-school teachers, and the goal was to focus on underserved and rural areas (UNICEF Innocenti, 2025). By 2024, Zambia had more than 6.5 million students enrolled in more than 13,000 schools with about 158,000 teachers (Ministry of Education, 2024). Even though this expansion is a big step toward fairness, deployment is still uneven. Remote schools in Western Province still have high student-to-teacher ratios and not enough qualified female teachers. This makes girls feel unsafe, less confident, and less likely to stay in school, especially in upper primary and lower secondary school (UNICEF Innocenti, 2025; Ministry of Education, 2024).

Basic infrastructure problems like not having reliable water points, not enough classroom space, and latrines that don't work or aren't separated by gender make attendance and retention even worse. Without private, clean sanitation, adolescent girls are more likely to miss school or drop out altogether when they are on their periods (Chibwana & Mufune, 2018; Lewin, 2007).

2.3. Health, nutrition, and cognitive preparedness

Health and nutrition also have a big impact on how well people learn. Chronic undernutrition during early childhood is associated with hindered cognitive development, diminished attention span, and enduring deficits in academic performance (Grantham-McGregor *et al.*, 2007). Many students in Zambia's rural areas come to school hungry or don't go to school at all to look for food or work (IPC, 2022). People in remote areas often don't get treatment for illnesses that could be easily treated in urban clinics because of distance, cost, or fear of being judged. This causes students to miss school often and disrupts their learning paths.

2.4. Gender norms, early marriage, and domestic roles

Gendered expectations strongly influence schooling outcomes. Girls in Western Province often shoulder heavy domestic responsibilities; caregiving, water collection, food preparation which cut into study time and attendance (UNESCO, 2018; World Bank, 2018). Early marriage remains a major barrier: nearly 3 in 10 Zambian women aged 20–24 report that they

were married before the age of 18, and more than two million women and girls nationally are estimated to have been married in childhood (UNICEF Zambia & UNFPA, 2025). Early marriage is a direct driver of permanent school exit for adolescent girls. Cultural expectations that boys' education is a better "investment," while girls are expected to marry, reinforce unequal resource allocation within households (UNESCO, 2018; World Bank, 2018).

At the same time, traditional leadership structures in rural Zambia are increasingly being mobilised as part of the solution. Chiefs and headpersons in parts of Western and other provinces have begun to issue local by-laws discouraging early marriage, supporting re-entry of adolescent mothers, and promoting girls' continued attendance. Community-based mentorship clubs for girls facilitated by female role models, teachers, and community health volunteers have shown promise in shifting norms and building girls' confidence to remain in school (Rozaria Memorial Trust, 2025; UNICEF Zambia & UNFPA, 2025).

2.5. Integrated and community-rooted interventions

Evidence across sub-Saharan Africa demonstrates that bundled, context-driven responses outperform narrow, standalone interventions. School feeding programmes, cash or in-kind support to vulnerable households, infrastructure improvements (especially sanitation and girls' safety measures), and gender-transformative mentorship initiatives have been associated with higher enrolment, attendance, and progression rates in rural settings (Lewin, 2007; UNESCO, 2015; World Bank, 2018). Critically, the sustainability of such interventions improves when they are co-owned by local communities and traditional authorities rather than externally imposed (Rozaria Memorial Trust, 2025).

The reviewed literature poses a that there is a lack of in-depth, qualitative studies from these specific districts that explore the interaction of these barriers from the perspective of local stakeholders leading to model developed that can mitigate the existing vices. This study endeavoured to bridge the literature gap.

3. METHODOLOGY

3.1. Research design

This study employed a qualitative research approach and an exploratory, descriptive design. A qualitative approach is appropriate in contexts where barriers to education are embedded in daily life, household strategy, cultural expectations, and local power structures. Such barriers often remain invisible in aggregate national statistics (Sikalumbi, 2023).

3.2. Study area

The study was conducted in Lukulu and Mitete Districts of Western Province, Zambia. Western Province is predominantly rural, experiences some of the highest poverty rates in the country and continues to lag in human development indicators (CSPR & Ministry of Finance, 2024; World Bank, 2025). Economic life revolves around subsistence farming, small-scale fishing, informal trade, and seasonal labour. Access to transport networks, health services, and formal wage employment is limited in many communities.

3.3. Sampling Frame and Techniques

Fifty people (25 from each district) who knew about barriers to education and how decisions are made were chosen using purposive sampling. The sample consisted of 20 educators (from both primary and secondary institutions), 10 parents or guardians, 10 traditional/community leaders, and 10 students (both male and female). This made sure that the study included the views of people who teach, people who support their children, or allow education, and people who go to school (Sikalumbi *et al.*, 2025). The criteria that were used to select the educators was 5 years of experience teaching in the area with minimum of diploma certificate which is the minimum qualification in the teaching fraternity. The parents and guardians were purposely sampled by picking those who had served in the Parents-Teachers Committees (PTC). Pupils were purposely sampled from the prefects and class monitors who were at least providing leadership to fellow students. However, traditional leaders were purposively sampled from the villages surrounding the sampled schools where the challenges existed.

3.4. Data collection

Three methods were used:

i. Semi-structured interviews with teachers, parents, and traditional leaders. These explored school resource constraints, costs, expectations placed on children, and perceived responsibilities of government and NGOs.

ii. Focus group discussions (FGDs) with parents and learners to surface collective norms, including beliefs about the economic value of schooling, attitudes toward girls' education, and practices around early marriage and work.

iii. Document review of district and national education statistics, policy briefs, and school records, including data on class size, teacher deployment, enrolment, and absenteeism (Ministry of Education, 2024; UNICEF Innocenti, 2025).

3.5. Data analysis

Interview and FGD transcripts were coded thematically. Deductive codes were drawn from established determinants of rural education; poverty, infrastructure, health, and gender norms (Lewin, 2007; Sirin, 2005). Inductive codes captured community-led solutions, such as informal savings schemes to purchase uniforms, traditional leadership sanctions against early marriage, and calls for school feeding programmes. Themes were then refined into an integrated systems perspective that informed the proposed Rural Education Resilience Model.

3.6. Ethical Consideration

The study adhered to established ethical standards for social research involving human participants in vulnerable settings. Ethical approval was obtained from a recognised institutional ethics committee prior to data collection. Participation in interviews and focus group discussions was voluntary, and informed consent was obtained from all adult respondents. For learners under the age of 18, assent was obtained alongside parental or guardian consent.

Confidentiality and anonymity were strictly maintained. Names of individual respondents, schools, and villages were not

disclosed. Sensitive issues such as early marriage, pregnancy, HIV-related stigma, and household poverty were approached with cultural sensitivity to minimise risk of social harm. The researcher avoided creating expectations of direct financial benefit, which can generate tension in high-poverty settings (CSPR & Ministry of Finance, 2024; World Bank, 2025).

4. RESULTS AND DISCUSSION

4.1. Poverty and household survival pressures

Participants repeatedly identified poverty as the most immediate and persistent barrier to schooling. Western Province as one of the highest poverty headcounts nationally, with nearly four in five households living below the poverty line (Sikalumbi, 2021; CSPR & Ministry of Finance, 2024; World Bank, 2025). While basic tuition may be waived, education is not truly "free" for most households because of hidden costs such as uniforms, stationery, exam fees, and transport. During crisis periods; drought, illness of a breadwinner, or sudden loss of income, parents prioritise immediate survival over schooling. One parent described schooling as "important for the future, but food is important for today," capturing the acute trade-off between long-term aspiration and short-term survival. These stresses that parents may opt to look for food first for them to survival before they could consider anything else. This puts schooling to be secondary. Due to hardships, parents could take children from school for weeks to help look for food.

Child labor is a problem that needs to be solved and a way to solve problems. Boys are sent away to herd cattle, fish, or farm, while girls are expected to do housework, sell small things, or take care of their younger siblings. Most of the learners are absent from school during the farming and fishing seasons, which causes them to miss school on a regular basis and, in many cases, drop out of school for good (Baker & Soler-Hernández, 2010; Sirin, 2005). This is a drain on human capital development. If the vices are not collectively addressed, the efforts to capacity build western province through education provision will not be fruitful.

4.2. Distance, lack of physical access, and overcrowding in class

Students in Lukulu and Mitete often must walk a long way to school, and sometimes they must cross areas that are prone to flooding. A lot of roads become unusable during the rainy season, which keeps people away for a long time. Teachers said that some students miss weeks of school after heavy rain because they can't cross rivers safely.

A lot of schools are too full. In many parts of the country, classrooms built for 35 to 40 students often have 70 or more. In rural areas, the ratio of students to teachers can be more than 80 to 1 (Chibwana & Mufune, 2018; Ministry of Education, 2024; UNICEF Innocenti, 2025). Teachers said that these situations made it harder for students to learn, caused more disruptive behavior, and made teachers more tired. This agrees with earlier studies that found that too many students in a classroom makes it harder to control the class and leads to worse learning outcomes (Chibwana & Mufune, 2018; Lewin, 2007).

There weren't always enough textbooks and other materials for teaching. Some schools have students who all use the same book. Another big problem is sanitation: girls need private, working toilets, but they aren't always there or working. Teachers said that a lot of teenage girls stay home during their periods because schools can't promise privacy or cleanliness. This makes them less interested in school and more likely to drop out (UNESCO, 2018; Chibwana & Mufune, 2018).

4.3. Missing school, health, and nutrition

Hunger and illness became common problems that made it hard to learn. Many students come to school without having eaten, which makes it hard for them to focus and participate. Teachers said that students who were hungry were tired, slow, and couldn't concentrate.

These observations are consistent with evidence that undernutrition damages cognitive development and long-term academic potential (Grantham-McGregor *et al.*, 2007). In food-insecure seasons, some children skip school entirely to look for piecework or food, reflecting a link between household food insecurity and educational exclusion (IPC, 2022).

Parents and teachers also reported that minor illnesses frequently go untreated because clinics are far or transport is unaffordable. Recurrent untreated illness drives chronic absenteeism and, eventually, dropout, particularly for learners who are already struggling academically.

4.4. Gender norms, early marriage, and domestic roles

Girls face unique constraints. Early marriage was cited as a major cause of girls' withdrawal from school. This is consistent with national data showing that about 29% of Zambian women aged 20–24 was married before 18, and an estimated two million women and girls in Zambia today were married in childhood (UNICEF Zambia & UNFPA, 2025). Parents and traditional leaders acknowledged that adolescent girls are sometimes removed from school either to marry or to take on permanent domestic responsibilities in the household.

These gendered expectations are reinforced by the perception that investing scarce resources in boys' education yields a higher economic return because boys are expected to become income earners, while girls are expected to leave the household after marriage (UNESCO, 2018; World Bank, 2018). Teachers also noted that the absence of female teachers in some schools makes girls less likely to seek help, especially with sensitive issues such as menstruation, harassment, or pressure to marry (UNICEF Innocenti, 2025).

However, several traditional leaders reported efforts to intervene, for example: discouraging early marriage; insisting that girls be allowed to remain in school; supporting re-entry of adolescent mothers after childbirth; and mobilising community resources to buy uniforms and sanitary pads for vulnerable girls. Similar community-led, gender-focused interventions in Southern Africa and Zambia have shown that when chiefs and community leaders publicly defend girls' right to education, dropout linked to early marriage and domestic burden can decrease (Rozaria Memorial Trust, 2025; UNICEF Zambia & UNFPA, 2025).

4.5. Community responses and locally proposed solutions

Participants were clear that they do not see education failure as

inevitable. They proposed:

i. School feeding and basic health screening to keep hungry or sick learners in class.

ii. Construction of additional classrooms, provision of desks and textbooks, and improved sanitation facilities (especially safe, private latrines for girls).

iii. Savings schemes or community bursaries to support uniforms and exam fees for the poorest households.

iv. Enforceable community by-laws against early marriage, backed by traditional leaders, and mentorship clubs for girls to build confidence and voice.

These proposals align with global evidence that multi-sectoral, community-led approaches combining economic support, infrastructure, health/nutrition, and gender norm change are more effective than stand-alone inputs (Lewin, 2007; UNESCO, 2015; World Bank, 2018; Rozaria Memorial Trust, 2025).

Findings from Lukulu and Mitete show that barriers to schooling are systemic, intersectional, and mutually reinforcing. Poverty determines whether a child even gets to school; distance and infrastructure determine whether they can physically attend consistently; health and nutrition determine whether they can learn while present; and gender norms determine who is permitted to remain in school long enough to transition to higher levels (Grantham-McGregor *et al.*, 2007; UNESCO, 2018; UNICEF Zambia & UNFPA, 2025).

The study importantly shows that national-level education reforms are necessary but not enough on their own. Zambia's 2022 massive teacher recruitment drive, which added more than 30,000 teachers and expanded the civil service teaching force by about 26% (UNICEF Innocenti, 2025), is a historic investment in fairness. More than 6.5 million students were enrolled in more than 13,000 schools across the country by 2024 (Ministry of Education, 2024). However, even with this growth, rural areas like Lukulu and Mitete still have overcrowded classrooms, not enough qualified teachers (especially female teachers), poor sanitation, and weak connections between schools and basic health or nutrition services (Chibwana & Mufune, 2018; Ministry of Education, 2024). In other words, increasing the number of teachers nationally does not automatically solve the layered barriers facing rural learners in Western Province.

4.6. Proposed model

In response to the vices, the study proposes a Rural Education Resilience Model (RERM) tailored for high-poverty, low-infrastructure districts such as Lukulu and Mitete. It is an integrated, context-driven model for strengthening rural education systems in Zambia.

The model is built on four interdependent pillars:

(i) Household Economic Protection: This pillar fosters community-based savings groups, emergency bursaries, and fee-support schemes to cover uniforms, exam fees, and transport, particularly for ultra-poor households. There must be strong linkages to livelihoods and social protection programmes that stabilise household income during shocks (CSPR & Ministry of Finance, 2024; World Bank, 2025).

Why this pillar matters: When household income is less volatile, children especially boys are less likely to be withdrawn from school for labour (Baker & Soler-Hernández, 2010).

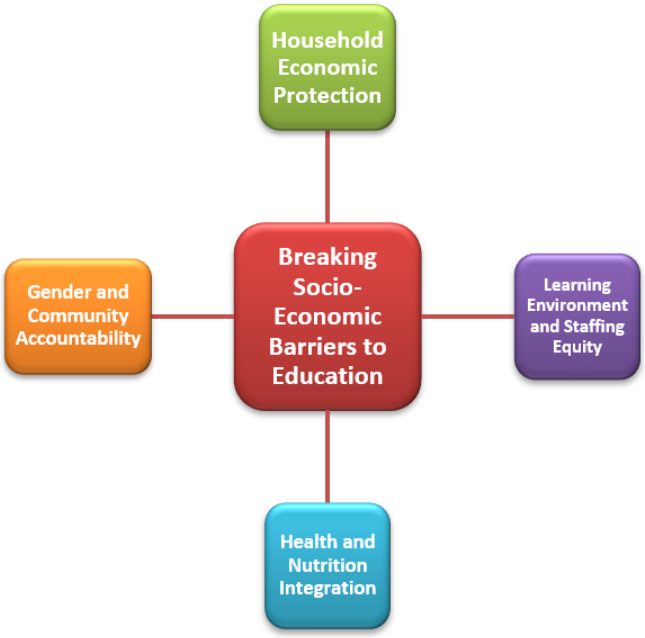

Figure 1. Rural Education Resilience Model

(ii) Learning Environment and Staffing Equity: This pillar advocates a continued targeted deployment of teachers to high-need rural schools, with specific incentives for rural retention and deliberate placement of female teachers to support girls' safety, dignity, and mentorship (UNICEF Innocenti, 2025). Further, there is need to investment in classrooms, desks, textbooks, and gender-sensitive sanitation (private latrines, and water points).

Why this pillar matters: Lower pupil–teacher ratios, safer sanitation, and reliable materials directly improve classroom time-on-task, behaviour, and retention (Chibwana & Mufune, 2018; Lewin, 2007).

(iii) Health and Nutrition Integration: This pillar advocates enhanced school feeding programmes, periodic health screenings, and structured referral pathways to local clinics. Provision of menstrual hygiene products and safe changing spaces for adolescent girls will support their education in the long run.

Why this pillar matters: Hunger, untreated illness, and menstrual stigma are among the most cited reasons for absenteeism and dropout in rural schools (Grantham-McGregor *et al.*, 2007; IPC, 2022; UNESCO, 2018). Addressing these vices will attract and keep learners in school.

(iv) Gender and Community Accountability: This pillar drives community enforcement of anti–child marriage norms, recognition of girls' right to continue schooling after pregnancy, and structured mentorship clubs for girls. Public commitments from chiefs and headpersons that early marriage will not be tolerated and that girls belong in school will go a long way (Rozaria Memorial Trust, 2025; UNICEF Zambia & UNFPA, 2025).

Why this pillar matters: Without a shift in gender norms, material interventions alone (e.g., classrooms, feeding) will not keep girls in school through adolescence (UNESCO, 2018; World Bank, 2018).

The RERM positions the school as a social anchor, not only a place for instruction, but a hub where education, health, protection, and basic social support intersect. It also recognises traditional leadership as a development actor, not merely a cultural authority.

5. CONCLUSION

Education in Lukulu and Mitete is constrained not by a lack of aspiration, but by structural realities: chronic poverty, long distances and unsafe routes to school, overcrowded and under-resourced classrooms, hunger and untreated illness, and gender norms that continue to push girls out of education through early marriage and unpaid domestic labour (CSPR & Ministry of Finance, 2024; IPC, 2022; UNICEF Zambia & UNFPA, 2025). These barriers are mutually reinforcing and reproducing intergenerational inequality.

The Rural Education Resilience Model (RERM) offers a pathway for translating Zambia's national education commitments into local impact. By combining four pillars; household economic protection, improved learning environments and equitable staffing, integrated health and nutrition support, and gender-anchored community accountability, the model responds to the actual reasons children disengage from schooling in rural Western Province. It recognises that inclusive education in rural Zambia is not only an education-sector responsibility, but a cross-cutting public goods question involving livelihoods, health, infrastructure, and cultural protection for girls.

Investing in rural learners is both a moral obligation and an economic strategy. Keeping children, and especially girls in school is essential for breaking intergenerational poverty, reducing child marriage, improving health outcomes, and building Zambia's long-term human capital base (UNESCO, 2015; World Bank, 2018; World Bank, 2025).

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