The Economic Value of Wildlife Watching Tourism

56th Regional Commission for Africa

Luanda, Angola
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Background of the study

- Wildlife is one of the most precious resources for tourism in Africa
- A resource that is seriously threatened by poaching
- Building the economic case
Wildlife watching tourism is a type of tourism that is organised and undertaken in order to watch or encounter wildlife. Wildlife watching tourism exclusively relates to non-consumptive forms of wildlife-based activities as observing and sometimes touching or feeding of animals, in contrast to consumptive forms like hunting and fishing.

(Following the definition of CMS)
Methodology

• Primary data collection through surveys from:
  - African tourism ministries/national tourism authorities
  - National wildlife conservation authorities and national parks
  - Tour operators (Africa, Europe, U.S.)

• Analysis of available tourism statistics
• Review of case studies
• In-depth interviews with selected governments and international organisations
Survey: 49 governmental institutions from 32 countries

26 Feb 2014 – 15 April 2014

65% of UNWTO’s African Member States

Governmental institutions, n = 49
Survey: 49 governmental institutions from 32 countries

Governmental institutions, n = 49

- West Africa: 17
- Central Africa: 6
- East Africa: 16
- Southern Africa: 10
Survey: 148 Tour operators

Balanced sample of tour operators (origin, size, range of annual turnovers, destinations)

Africa: 75
Europe: 66
North America: 3
Asia: 3
Australia: 1

Tour operators, n = 148
Survey results
Importance of wildlife watching

• Nature, national parks and wildlife most important items for tourists travelling to Africa

• Wildlife watching tourism very important also from point of view of participating governmental institutions

• Wildlife watching tours offered by TO in great majority of African countries (38)
Characteristic of wildlife watching product

- Mainly in protected areas
- Diverse tourism segment with regards to travel arrangements and costs
- Typically combined with cultural visits and other nature related activities
- Safaris are the largest sub-segment
Kinds of wildlife watching offered by TO

- Safari: 38%
- Birds: 26%
- Marine: 16%
- Great Apes: 11%
- Special: 9%

Tour operators, n = 148 (cases)
Are local communities employed in wildlife watching tourism?

Governmental institutions, n = 26
Local services included in wildlife watching tours

Tour operators, n = 148 (cases)
Economic importance

• Participating institutions expressed need to access more reliable data on economic indicators with regards to wildlife watching

• Average length of wildlife watching tours is 10 days

• Average spending 430 USD per day
Economic importance - link

- Countries with major number of protected areas (PA) have receipts up to USD 90 million p.a.
- Countries with medium number of PA – USD 2-15 million p.a.
- Countries with small number of PA – USD 20.000-700.000 million p.a.
Anti-poaching involvement

- Majority of the protected area authorities involved in anti-poaching measures
- Tourism authorities involved only to a minor extent
- Majority of tourism authorities do not disseminate information on poaching
- Only a few inform their customers proactively on the issue
Does poaching affect wildlife watching tourism?

Yes 71%

No 27%

n/a 2%

All survey participants, n = 197
Involvement in anti-poaching

Is your **Ministry/Authority** involved in anti-poaching measures?

- Yes
- No
- n/a

Governmental institutions, n = 49

Does your **business** fund anti-poaching initiatives?

- Yes
- No
- n/a

Tour operators, n = 148
“The lifeline of nature based tourism is wildlife.”

“Wildlife conservation should play a bigger role for the tourism sector and the revenue it generates.”
Outlook / Recommendations for MoT

- Support involvement with conservation and anti-poaching initiatives
- Address consumers through awareness raising campaigns on poaching
- Tourists, especially from Asia, are unique enablers of change
Thank you!

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