



The Economic Value of Wildlife Watching Tourism

56th Regional Commission
for Africa

Luanda, Angola
28 April 2014



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



Definition of wildlife watching tourism

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)



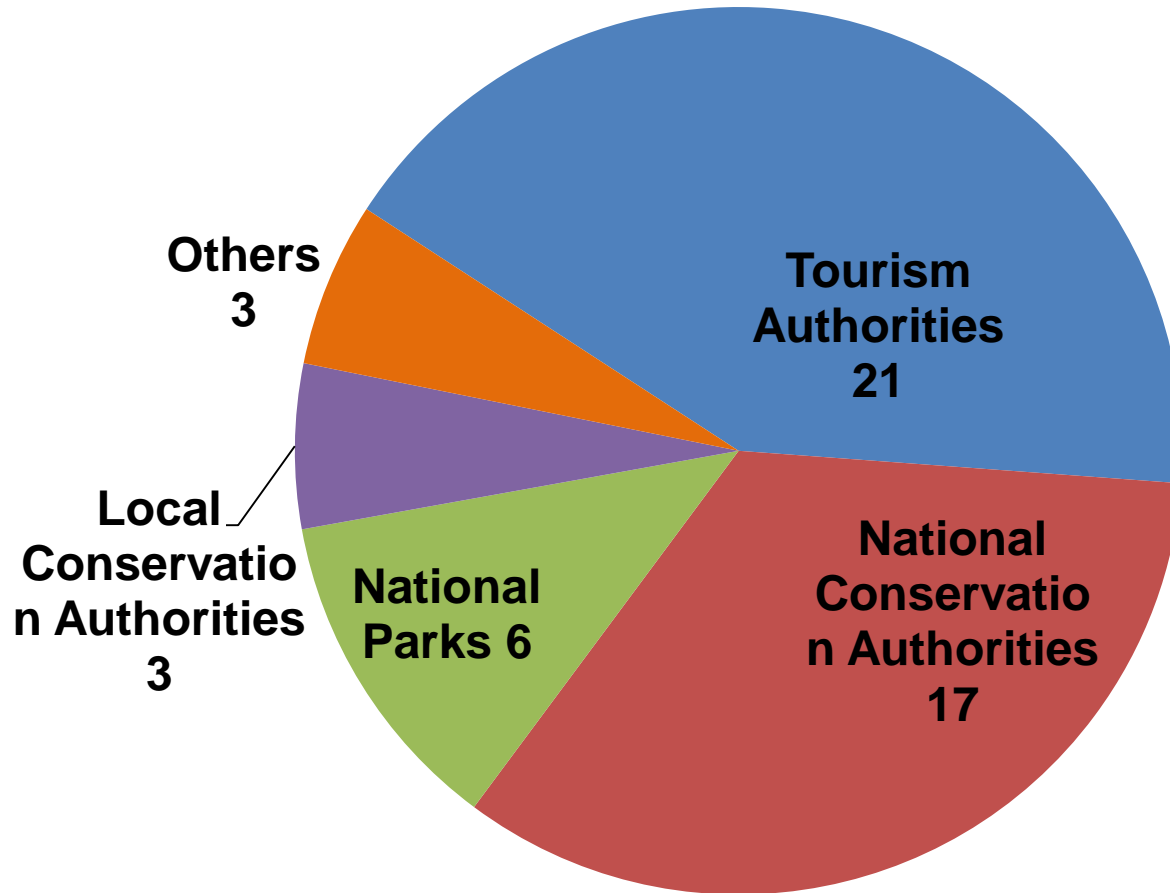
Methodology

- 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

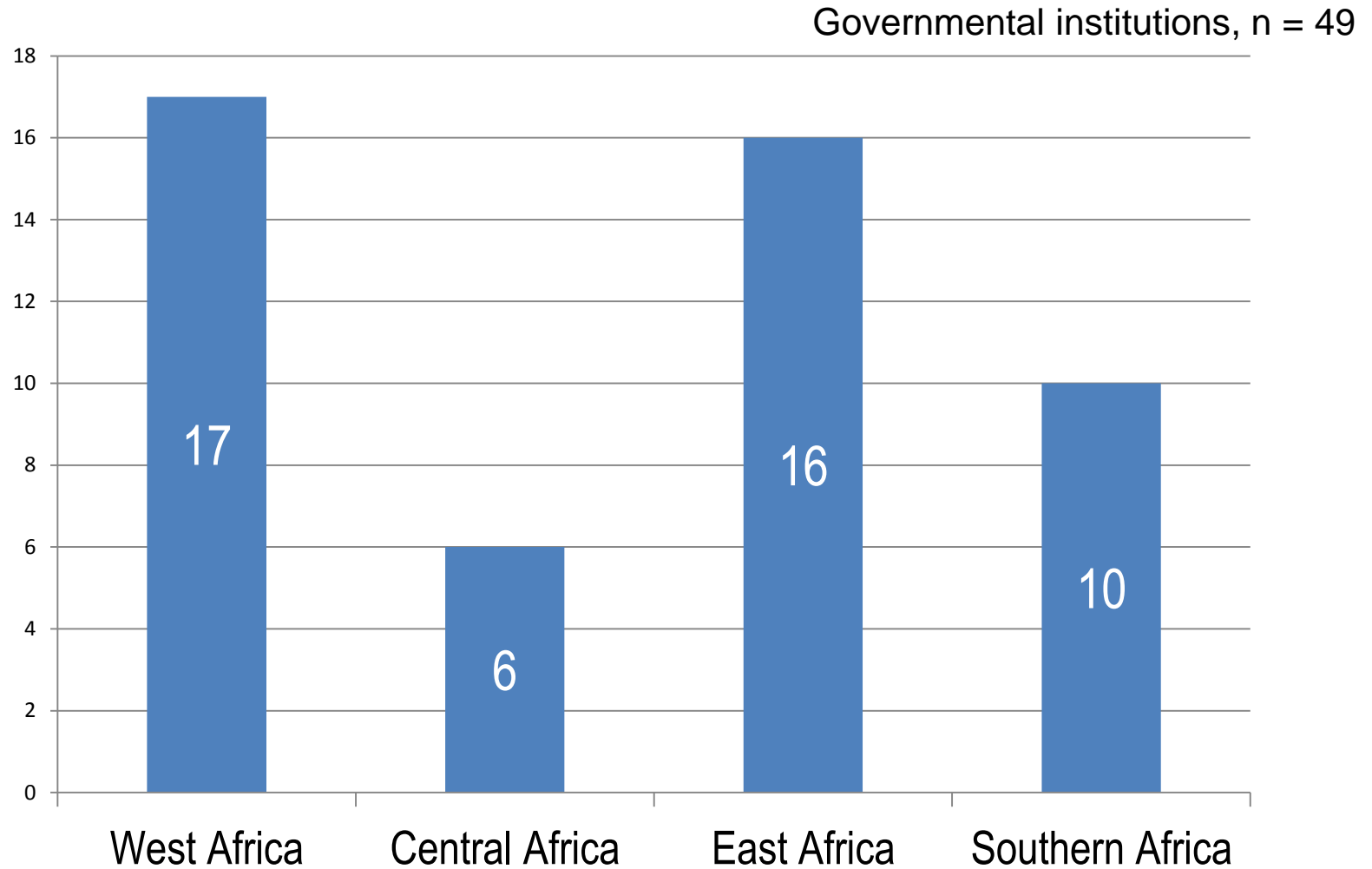


65% of
UNWTO's
African
Member States

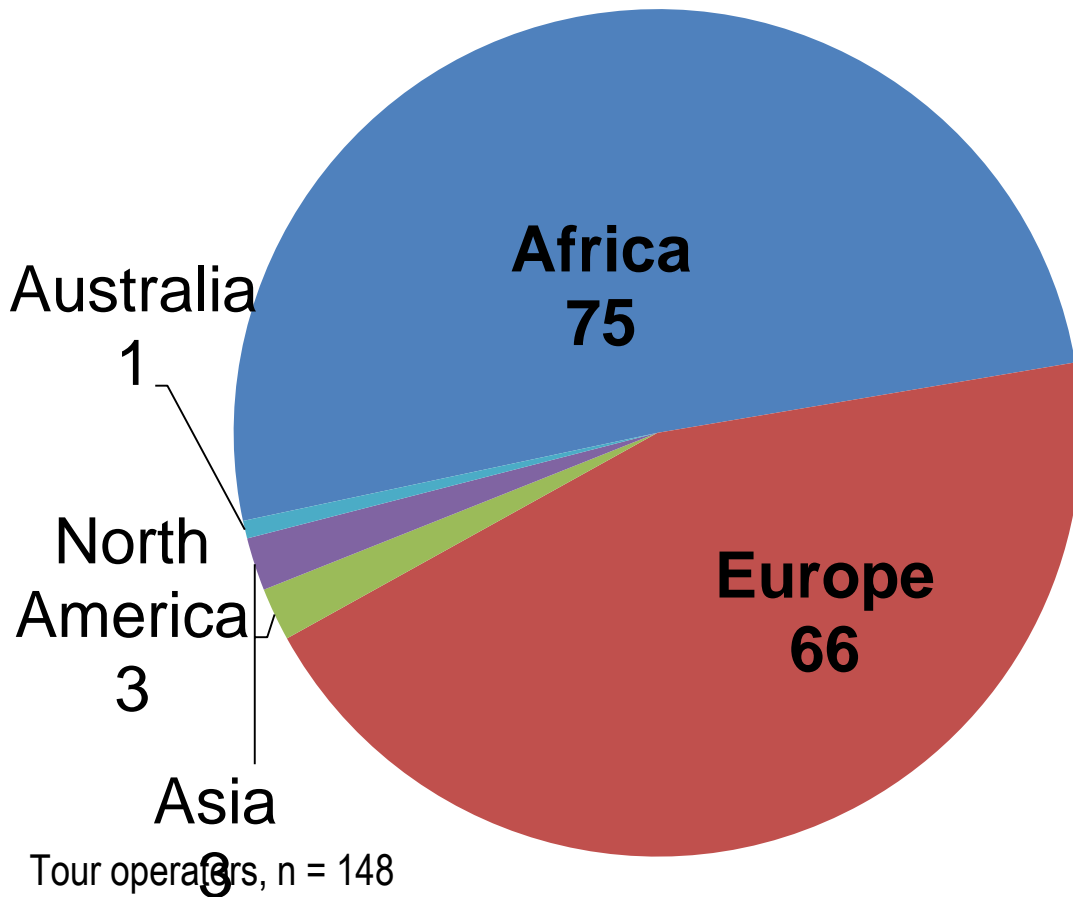
Governmental institutions, n = 49



Survey: 49 governmental institutions from 32 countries



Survey: 148 Tour operators



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



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)

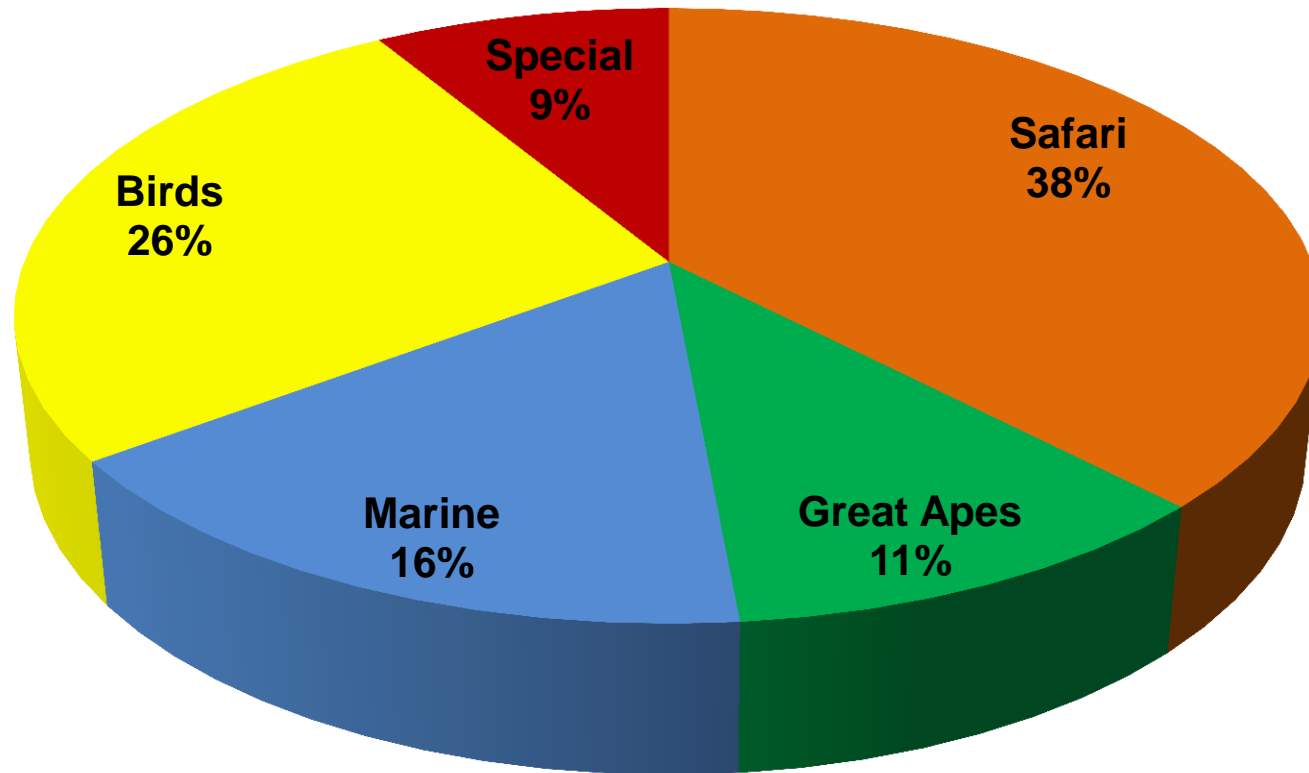


Characteristic of wildlife watching product

- 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

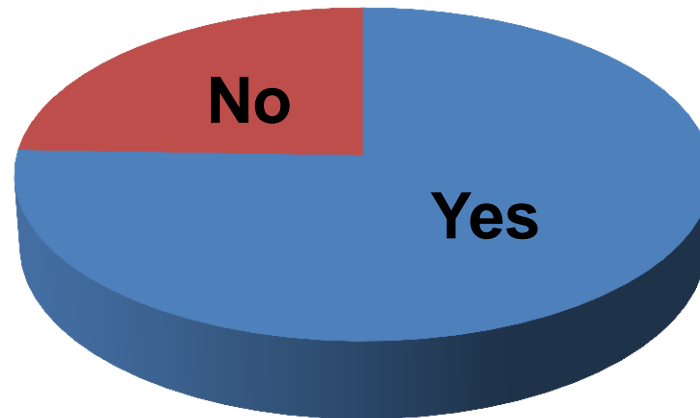


Tour operators, n = 148 (cases)



Communities: Direct benefits

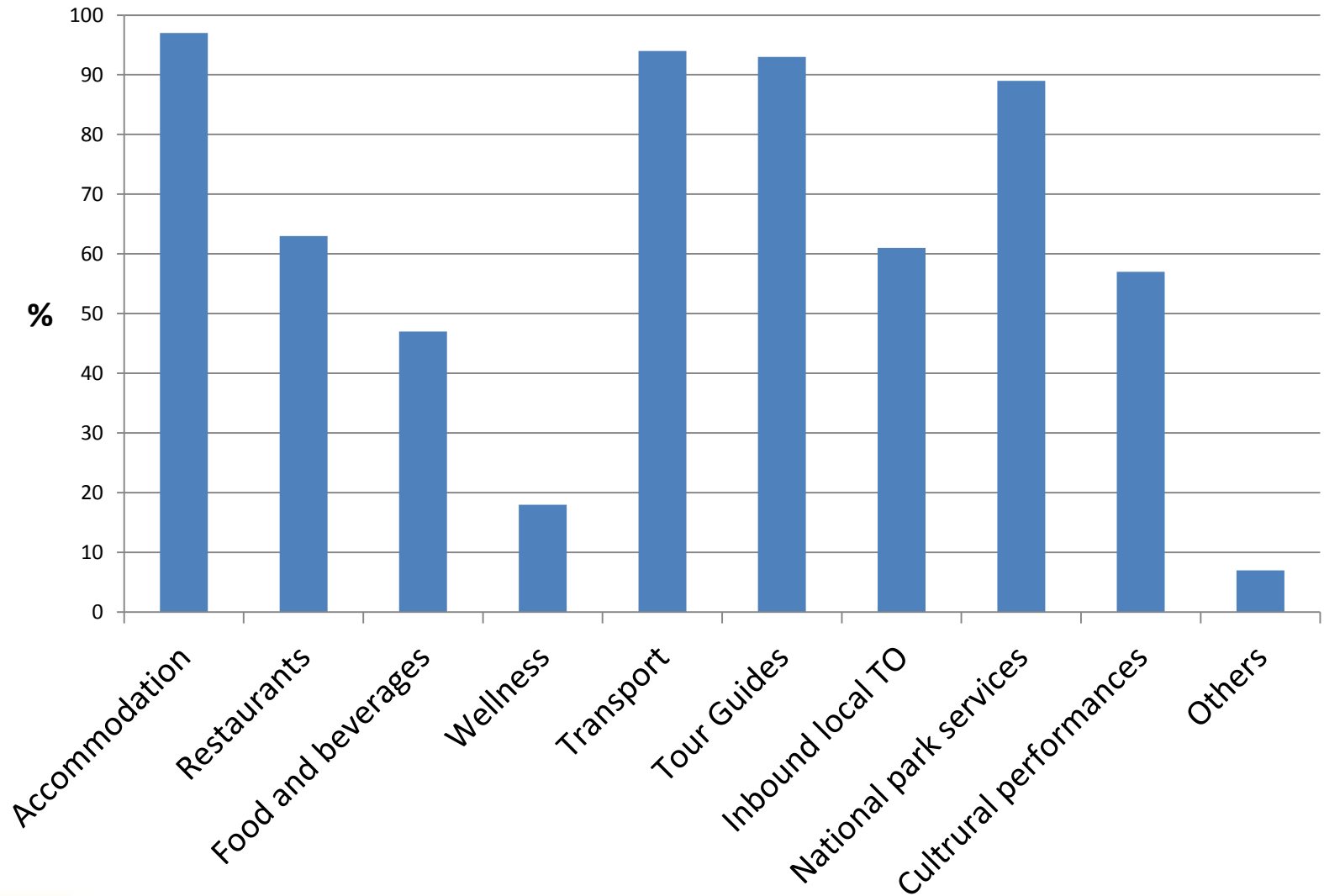
Are local communities **employed** in wildlife watching tourism?



Governmental institutions, n = 26



Local services included in wildlife watching tours



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.

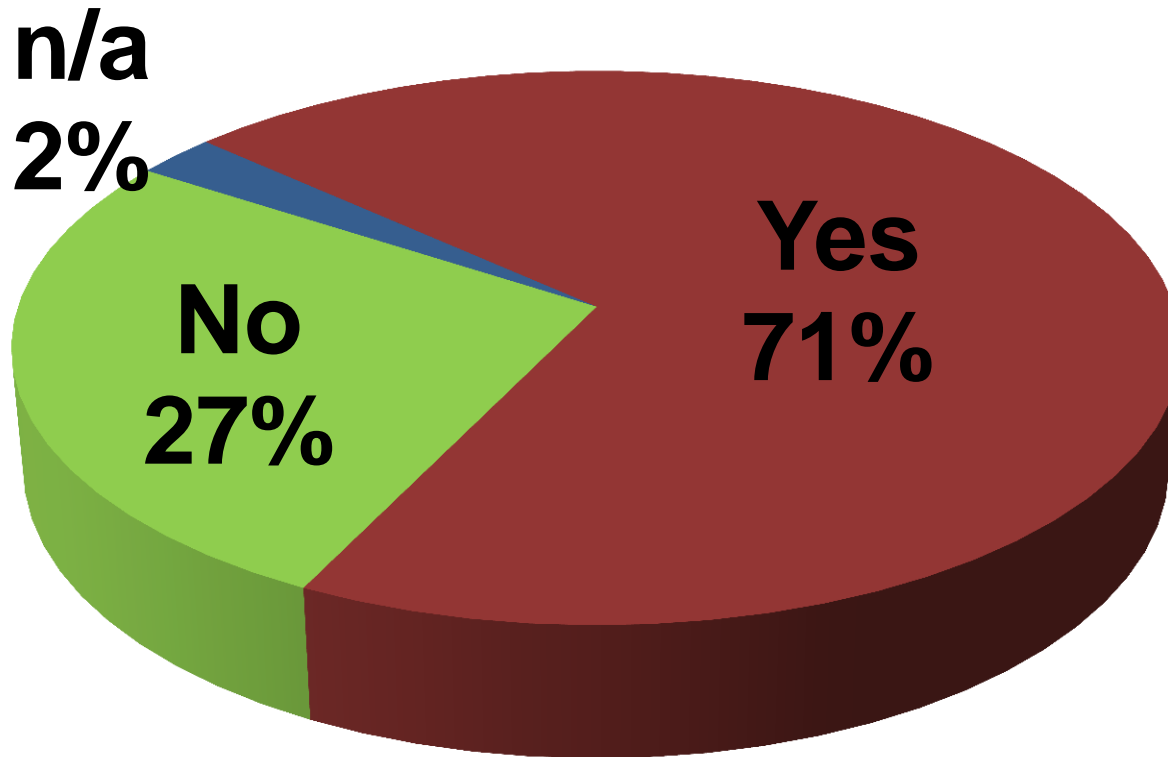


Anti-poaching involvement

- 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?

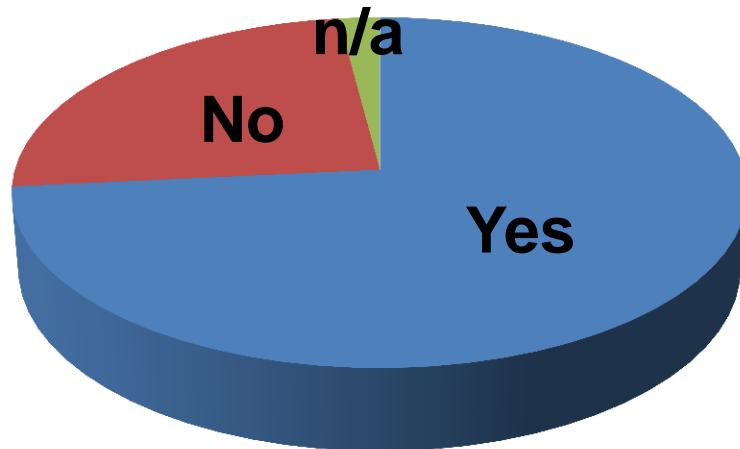


All survey participants, n = 197



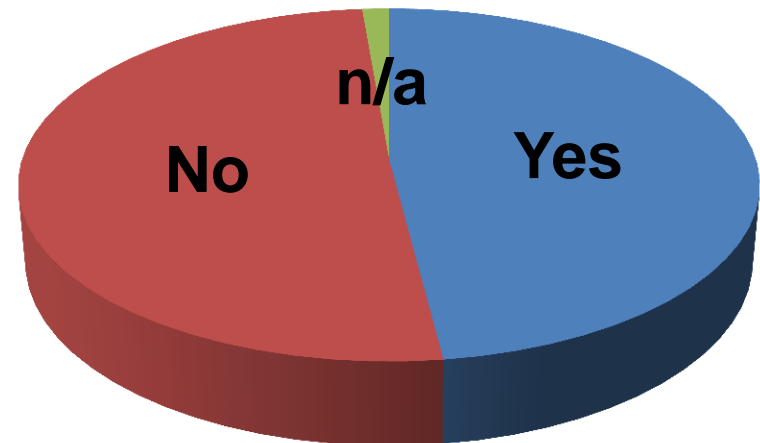
Involvement in anti-poaching

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



Governmental institutions, n = 49

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



Tour operators, n = 148



Quotes

“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!

Dr. Dirk Glaesser

Director

Sustainable Development of
Tourism

World Tourism Organization

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Tel: + 34 91 5678 224
Fax: + 34 91 5713 733
email: dglaesser@unwto.org
www.unwto.org

