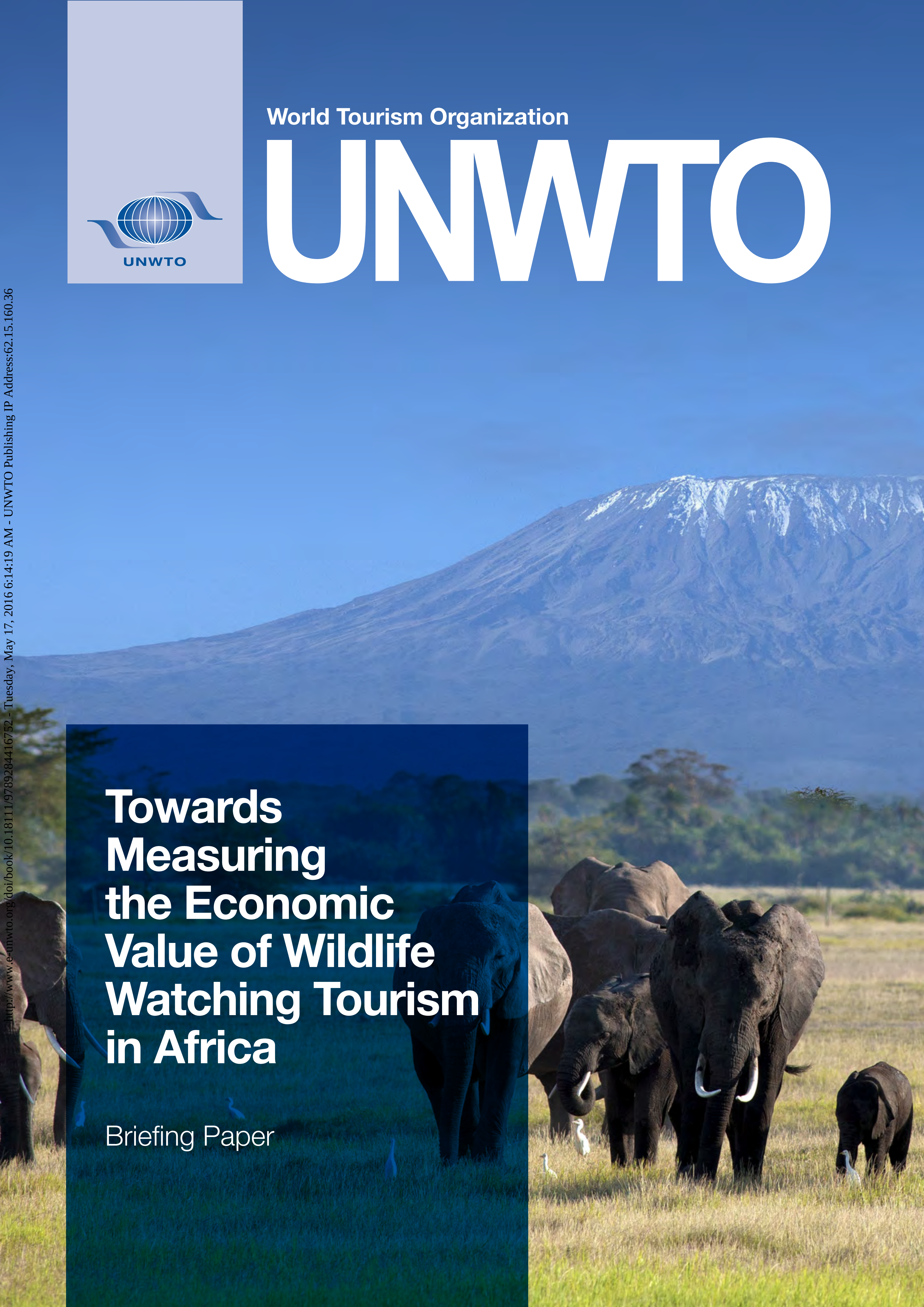


World Tourism Organization

UNWTO

Towards Measuring the Economic Value of Wildlife Watching Tourism in Africa

Briefing Paper

Towards Measuring the Economic Value of Wildlife Watching Tourism in Africa – Briefing Paper
ISBN (printed version): 978-92-844-1674-5
ISBN (electronic version): 978-92-844-1675-2

Published by the World Tourism Organization (UNWTO).
First printing: 2015

Printed in Spain.

World Tourism Organization (UNWTO)
Calle Capitán Haya, 42
28020 Madrid
Spain

Tel.: (+34) 915 678 100
Fax: (+34) 915 713 733
Website: www.unwto.org
E-mail: omt@unwto.org

Citation: World Tourism Organization (2014), *Towards Measuring the Economic Value of Wildlife Watching Tourism in Africa – Briefing Paper,* UNWTO, Madrid.

Towards Measuring the Economic Value of Wildlife Watching Tourism in Africa

Briefing Paper

Table of Contents

Annexes

Executive summary

Set against the backdrop of the ongoing poaching crisis driven by a dramatic increase in the illicit trade in wildlife products, this briefing paper intends to support the ongoing efforts of African governments and the broader international community in the fight against poaching. Specifically, this paper looks at the wildlife watching market segment within the tourism sector and highlights its economic importance with a view to encouraging tourism authorities and the tourism industry to collaborate in strengthening anti-poaching measures and raising awareness of these issues among tourists. The analysis identifies key economic indicators and characteristics of wildlife watching tourism in African countries. This paper acts a first step towards a more systematic measurement of the economic value of the wildlife watching tourism market segment in Africa and in defining the role of the tourism sector in the fight against poaching. In its research, UNWTO followed a multi-level, participatory approach, collecting as much information as was available at the international, national and local levels and creating a network of contacts for potential future research.

This paper focuses specifically on non-consumptive forms of wildlife tourism which offer visitors the experience of observing wildlife in natural and non-captive habitats. Generally, the species of wildlife that can be observed through this form of tourism are the very same as those most often threatened by poaching and other environmental detriments. The research findings are based on a review of publications, economic data, case studies and other sources related to wildlife watching tourism, as well as on the exchange of experiences with international organizations working in the fields of nature conservation, tourism, sustainable development and wildlife crime. In addition, to address a scarcity of data and statistical information about the wildlife watching tourism segment and its economic value, a survey was carried out among African tourism ministries and authorities, protected area and wildlife

Note: The report was prepared under the supervision of Dr. Dirk Glaesser, *Director of Sustainable Development of Tourism, World Tourism Organization* with support from the *Regional Programme for Africa* and *Communications and Publications,* and contributions from Dr. Mohcine Bakhat, Gordon Clark, Virginia Fernandez-Trapa, Sofia Gutierrez, Borja Heredia Salis, Dr. Oliver Herrmann, Lyris Lyssens, Stephanie Roth, Enrico Saltarelli, Michèle Schaul, Stephanie Stein.

conservation institutions, and international and African-based tour operators. This briefing paper was likewise prepared in collaboration with the Convention on Migratory Species of Wild Animals (UNEP/CMS), which played an especially important role in establishing contact with protected area and wildlife conservation authorities.

A total of 48 governmental institutions (tourism authorities and protected area and wildlife conservation agencies) from 31 African countries participated in the survey. The sample represents 63% of UNWTO African Member States. Additionally, a total of 145 tour operators selling trips to Africa from 31 different countries participated, 50% of which were tour operators mainly from Europe (generally the principal source market for Africa) and 50% were Africa-based tour operators. The survey findings confirm that wildlife watching is a very important segment of tourism for most African countries, representing 80% of the total annual trip sales to Africa for the participating tour operators, with that share only increasing. The survey findings also indicated that for the vast majority of the countries denoted in the paper, poaching is seen as a serious problem that has negative impacts on tourism that threatens the sector's long-term sustainability and its development opportunities. For example, the employment opportunities generated for the local community in accommodation, restaurants and guiding, as well as the indirect benefits linked to the redistribution of protected area fees and community funds are at risk from the negative impacts of poaching.

Feedback from the survey also reveals a picture of where wildlife watching tourism is taking place and what kinds of activities travellers are taking part in. Wildlife watching tourism occurs mainly in protected areas; and nature, national parks and wildlife are considered the most important tourism assets for tourists travelling to Africa. While the regions that are most visited for the purposes of experiencing wildlife watching tourism are East Africa and Southern Africa, Central and West African tourism authorities are committed to further developing this type of tourism. Safari is the most popular kind of wildlife watching and is being offered by 96% of the participating tour operators. This is followed by bird watching, which is offered by 80% of the participating tour operators and seems to be combined frequently with other activities. In countries that are not considered classic safari destinations, the observation of great apes, marine wildlife and tracking of particular species are particularly important.

The exercise has also been successful in identifying key indicators related to wildlife watching tourism that assist in measuring the segment's economic importance and potential growth. For instance, a typical wildlife watching tour involves on average a group of six people, lasts 10 days, has an average daily price per person of US$ 433 and captures an additional US$ 55 in out-of-pocket expenses per person, per day. The findings also indicated the differences between standard and luxury segments with the greatest variation being in both average daily price per person per day (US$ 753 for a luxury package and US$ 243 for a standard package) and in out-of-pocket expenditures (US$ 59 for a traveller on a luxury package and US$ 44 per person per day on a standard package). Little variation was found between the segments related to the size of the group or the average length of stay which seem to be consistent characteristics of the wildlife watching product instead of factors directly related to the comfort of the experience.

With regards to protected area visitors and receipts, results suggest that a total of 14 countries are generating an estimated US$ 142 million in entrance fees for protected areas. Because this figure covers only a small number of countries and is based on some inconclusive data, it can be assumed that protected area receipts are indeed much higher than the figure suggests. Fortunately for the purposes of future analysis, the research found that there are numerous ongoing efforts being carried out by African governments to monitor data that could be useful in estimating the economic value of the wildlife watching tourism sector. That being said, further improvements are needed as these efforts are often not consistent and commonly lead to inconclusive results.

The data also indicated that while a majority of protected area authorities are involved in anti-poaching measures, the tourism authorities are only involved to a minor extent and most do not distribute information on poaching to tourists. Of the participating tour operators about 50% are funding anti-poaching initiatives and/or engaging in nature conservation projects, however only a few are proactively taking the initiative to inform their customers on the issue.

In conclusion, the findings suggest that guidance and capacity building in developing consistent monitoring of protected area visitors and receipts and subsequently putting together a framework for the analysis of these data are needed. In this regard, establishing a model linked to an overall assessment of the economic value of wildlife watching tourism in Africa that would connect data from protected areas with tour operators' performance would be most useful. In addition, based on the experiences gathered and the network established through this exercise, such a model could be developed and tested with relevant stakeholders, namely tourism and wildlife conservation authorities at the national and local levels, and the tour operator community. Ideally, the model should be able to look at specific kinds of wildlife watching tourism (safari, marine, bird watching, etc.) in order to be applicable to the very different settings in which wildlife watching tourism takes place.

Finally, while the involvement in anti-poaching initiatives by tour operators is not very extensive yet, the survey results suggest that there is potential for mobilizing the tourism sector in anti-poaching campaigns, which is significant in that the sector can play a key role in raising awareness and potentially financing (or co-financing) anti-poaching initiatives. Further research is recommended in order to assess the level of tour operators' concern with nature conservation as well as their involvement with conservation and anti-poaching initiatives and other types of initiatives in place. Such research could be designed in close cooperation with the target group and not be restricted to European and North American travel markets but could also include emerging markets for outbound tourism to Africa like Asia.

1. Background

1.1 Wildlife crime challenges nature conservation

African countries have long promoted biodiversity conservation through the sustainable use of natural resources and there have been major achievements in the protection and recovery of wildlife populations[1]. The dramatic increase in poaching and illicit trade of wildlife products since 2005 – often referred to as 'wildlife crime' – threatens to undermine these conservation achievements and endangers some of the most iconic species to become extinct within only a few decades – most prominently, elephants and rhinos, but also other big mammals such as lions and gorillas as well as smaller species[2]. Furthermore, wildlife is also threatened by the increasing loss of habitat and loss of range[3], among other pressures.

The increase in wildlife crime is a result of widespread poverty, underfunding of wildlife conservation efforts, lack of law enforcement and political instability in the concerned countries and a rising demand for exotic animal products overseas, foremost in the rapidly growing economies of Asia due to increasing wealth and recent changes in consumer spending patterns[4]. While in the past much of the poaching in Africa had been opportunistic, wildlife crime has become a serious criminal activity involving transnational networks of well-resourced and organized groups[5].

Poaching and the illegal wildlife trade lead to detrimental environmental, economic and social consequences. Wildlife crime threatens the future existence of species and impacts the ecological integrity of whole ecosystems, especially as big mammals are essential for the maintenance of biodiversity and ecosystem functions. Poaching deprives communities of their natural capital and cultural heritage and undermines sustainable economic development and poverty alleviation. Wildlife crime is also a security challenge that threatens national security, undermines government authority, breeds corruption and restricts the potential for sustainable investment, constraining a country's social and economic development[6].

Over time, the international community has become aware of the fact that poaching is the most immediate and direct threat to wildlife in Africa, making its upward trend a cause of serious concern. There has been progress in a number of countries but compliance with international conventions and law enforcement are still insufficient in many parts of the world[7]. Therefore, actions against wildlife crime are being reinforced and readjusted through the statements and agreements among numerous international governmental and nongovernmental bodies.

Examples of the enhanced efforts that are active in the international community to address these issues can be seen in programmes such as the Monitoring the Illegal Killing of Elephants (MIKE) and the Elephant Trade Information System (ETIS); the commitments made at Rio+20 (June 2012), CITES COP 16 (March 2013) and the G8 Summit (June 2013); the discussions held during the United Nations General Assembly (UNGA, September 2013), the African Elephant

1. Miliken/Shaw (2012); UNEP/IUCN/ TRAFFIC/CITES (2013); Blanc et al. (2007).
2. UNEP/IUCN/TRAF-FIC/CITES (2013); WWF/Dalberg (2012); Milliken/Shaw (2012); WWF (2013); UNODC (2014a).
3. Miliken/Shaw (2012); UNEP/IUCN/TRAF-FIC/CITES (2013); CITES (2010).
4. UNODC (2014a); UNEP/IUCN/TRAF-FIC/CITES (2013); CITES (2013).
5. UNODC (2013a); UNODC (2014a); WWF/Dalberg (2012); IISD (2013); UNEP/IUCN/TRAFFIC /CITES (2013).
6. WWF/Dalberg (2012); Republic of Botswana/IUCN (2013); ICCWC (2011); Ripple (2014); CITES (2013).
7. Nowell (2012); WWF/Dalberg (2012); IISD (2013); Milliken/Shaw (2012).

Summit (December 2013) and the London Conference on Illegal Wildlife Trade (February 2014); the side event held at the First United Nations Environment Assembly (UNEA) of UNEP (June 2014); and the launch of the Strategic Mission of the International Consortium on Combating Wildlife Crime (ICCWC) at CITES SC 65 (July 2014), among others[8].

1.2 Tourism is a driver of sustainable development

Tourism is increasingly referred to as a driver of sustainable development. It was mentioned in the UNGA Resolution 66/288 which endorses the Outcome Document of the United Nations Conference on Sustainable Development (Rio+20), "The future we want", as one of the sectors capable of making a significant contribution to the three dimensions of sustainable development, noting also that tourism is linked closely to other sectors and can create decent jobs and generate trade opportunities. The document builds on the previous Resolution 65/173, Promotion of Ecotourism for poverty eradication and environment protection, which "recognizes that the development of ecotourism, within the framework of sustainable tourism, can have a positive impact on income generation, job creation and education, and thus on the fight against the poverty".

Moreover, tourism has been identified as one of the ten key sectors to evolve towards a Green Economy and is included as one of the initial 10-Year Framework of Programmes (10YFP) to accelerate the shift towards more sustainable consumption and production patterns. Additionally, the Conference of the Parties (COP) of Multilateral Environmental Agreements (MEAs) such as the Convention on Biological Diversity (CBD) or the Ramsar Convention on Wetlands of International Importance have also approved respectively Decisions VII/14, on "Biological diversity and tourism" and XI/6 on "Cooperation with other conventions, international organizations, and initiatives" and Resolution XI/7 on "Tourism, recreation and wetlands", recognizing the potential of tourism to advance biodiversity conservation.

In economic terms, many countries in Africa, especially in Sub-Saharan Africa, have benefitted from strong growth in their tourism sector in recent years. Although the economic importance of tourism in Africa and the continent's share of the worldwide tourism market are relatively modest (5% of global international arrivals and 3% of global international receipts), tourism has been increasing steadily with an average annual growth rate of international tourist arrivals of about 6.1% per year between 2005 and 2013. During the same period, arrivals grew from 35 million in 2005 to reach a new record of 56 million in 2013[9]. The total international tourism receipts for Africa in 2013 reached US$ 34.2 billion. Absolute numbers are predicted to more than double during the upcoming decade, reaching 134 million international arrivals in 2030.

From a policy perspective, it is important to note that over 30 African countries have identified tourism as a national priority within the Enhanced Integrated Framework (EIF)[10]. This underlines that tourism is considered a priority sector for many African countries and much hope is put into future tourism development as a vehicle for economic growth, job creation and poverty alleviation[11]. The multiplier effects on local and national economies due to the broad range of goods and services included in its value chain have benefits beyond generating income and revenue[12].

Research related to pro-poor tourism and experiences have demonstrated the functions of tourism from the perspective of sustainable development and poverty alleviation[13]:

- Tourism can support the transformation and diversification of national economies;
- Tourism can be developed in remote areas and developing regions that do not offer other export options;
- Tourism is a labour-intensive industry and can create decent employment for women, young people and marginalized populations;
- Cultural and wildlife heritage is one of the assets of many developing countries that can be harnessed for economic development; and
- Tourism can create net benefits and offers a wide range of opportunities for micro, small and medium enterprises (MSMEs).

1.3 Tourism is affected by the loss of species

The world's highest levels of biodiversity occur in less-developed countries and these offer some of the world's most well-known wildlife watching destinations. Africa is exceptional for mammal diversity and the main destination for wildlife watching tourism[14]. According to the Centre for the Promotion of Imports from developing countries in the Netherlands (CBI), the destination of about half of all wildlife watching tourism trips booked worldwide is an African country. The global market size of wildlife tourism has been estimated at 12 million trips annually and is growing at a rate of about 10% a year[15].

The leisure tourism market in Africa represents over half of the international tourist arrivals to Africa[16] and is characterized by high-end trips to top wildlife watching and nature destinations, niche tourism products such as adventure trips and cultural heritage tours and lower-end beach holidays. The middle-income market on the other hand remains relatively underdeveloped[17]. The most established tourism products in Africa are safari, beach resort, business and Diaspora tourism[18] while newly emerging products are adventure tourism (mainly nature-related such as trekking and adventure sports), cultural heritage and wellness/health tourism[19].

The most important long-haul markets for Africa are France, United Kingdom, United States of America, Germany and Portugal. Smaller markets include tourists from other European countries, Canada and Australia, while important future source markets are in emerging countries like China, India and Russian Federation[20]. Furthermore, there is a significant increase in domestic and intraregional travel in Africa undertaken for a variety of purposes from business and shopping to visiting family, to cultural heritage sight-seeing and other leisure reasons.

Wildlife watching tourism, like other types of tourism, is sensitive to economic circumstances and has decreased during this recent economic recession. Nevertheless, wildlife watching tourism is a growing market segment and interest in wildlife watching trips has only increased with a rise in media coverage and Internet communication. Conservation issues and awareness of the risk of extinction of an increasing number of species also contribute to tourists' motivation to observe wildlife ranging freely in their natural habitats[21].

Countries in East and Southern Africa are known as the world's top destinations for the so-called "Big Five" watching (African Elephant, Cape Buffalo, leopard, lion and rhinoceros). In addition to Africa's classic safari destinations, alternative or complementary destinations are emerging with new products, for example gorilla trekking in Central Africa. These wildlife-related tourism products can only be experienced on the African continent and thus represent a unique selling proposition for African tourism. In addition to the mentioned iconic species, all African countries offer outstanding opportunities to experience wildlife and nature – including bird watching, observation of marine wildlife and viewing of agglomerations of wildlife along migration routes.

However, wildlife crime is threatening the very existence of iconic species that are essential to Africa's image as home to the world's top wildlife destinations and thus jeopardizes the basis of one of Africa's most important tourism products. Security, safety, the conservation of ecosystems, and the quality of tourism products and services are basic prerequisites for successful tourism development, while poaching has serious negative impacts on the political, social and economic framework in which tourism development can take place. Consequently, the loss of wildlife caused by poaching is likely to significantly impact tourism development in Africa as well as the tourism sector worldwide linked to the African market with the subsequent reduction of the sustainable development opportunities linked to the sector.

8. CITES (2014); WWF/Dalberg (2012); IISD (2014); ICCWC (2011).
9. UNWTO (2013); UNWTO (2014a); UNWTO (2014b); UNWTO (2014c).
10. A multi-donor programme providing trade-related assistance to LDCs (online), available at: www.enhancedif.org.
11. AFTFP (2009); Christie et al. (2013); UNWTO (2002a); UNWTO (2002b); (Ebbe 2010); UNWTO (2013); WTTC (2012).
12. Christies et al. (2013: 1).
13. UNEP/CMS (2006); Job/Paesler (2013); Christie et al. (2013); Higginbottom (2004).
14. Higginbottom (2004).
15. CBI (2014).
16. UNWTO (2014c).
17. Christie et al. (2013).
18. African Americans wishing to visit the countries of their ancestors.
19. Christie et al. (2013), AFTFP (2009).
20. AFTFP (2009); UNWTO (2014a).
21. CBI (2014).

2. Scope of the briefing paper

2.1 Objective

This briefing paper aims to identify key economic indicators and characteristics of wildlife watching tourism in African countries in order to highlight this market segment's economic importance and encourage tourism authorities and the tourism sector to collaborate in strengthening anti-poaching measures and raising awareness of these issues among tourists.

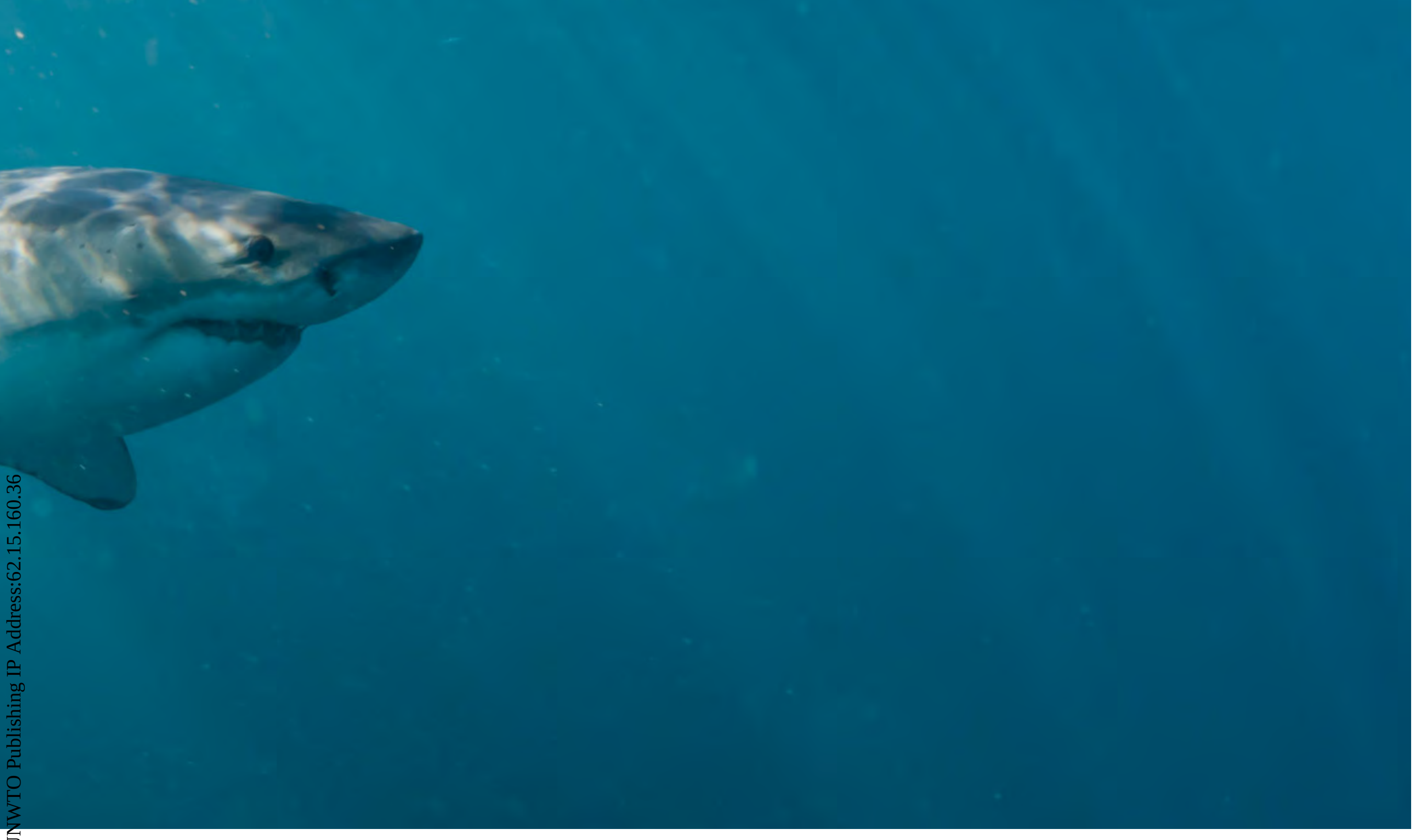
This paper is a first step towards measuring more systematically the economic value of the wildlife watching tourism market segment in Africa and in defining the role of the tourism sector in the fight against poaching.

2.2 Methodology

This briefing paper is based on a review of publications, economic data, case studies and other sources related to wildlife watching tourism; a survey among African tourism ministries and authorities; protected area and wildlife conservation agencies; international and African-based tour operators; as well as an exchange of experiences with international organizations working in the fields of nature conservation, tourism, sustainable development and fighting wildlife crime (a list of contributors can be found in annex 1).

The collaboration with the Convention on Migratory Species of Wild Animals (UNEP/CMS) for the preparation of the briefing paper is to be highlighted, especially for the key role that it played when establishing contact with protected area and wildlife conservation agencies.

The desk research was initiated in February 2014 and was followed by an online survey which was concluded on 15 April 2014. Consultations with representatives from a variety of relevant organizations took place during the process. A first draft of the document was presented to the



African Ministers of Tourism during the UNWTO Commission for African Member States[1] celebrated in Luanda, Angola, on 28 April 2014. A second round of consultations focusing on key questions of the survey was carried out with tour operators in the month of May applying the Delphi method[2]. The final analysis of data was carried out between June and July 2014. The validation of the results by the governmental institutions and contributors was completed in September 2014.

2.3 Definition of wildlife watching tourism[3]

Based on the definition of UNEP/CMS[4], this briefing paper defines: "Wildlife watching tourism is a type of tourism that is organized 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."

The specific tourism products with a main purpose of wildlife observation are often named after the animal or the group of animals primarily observed. For instance:

– Big Five watching (buffalo, elephant, leopard, lion, rhino);

– Gorilla tracking;

– Lemur tracking;

– Bird watching;

– Whale watching; and

– Dolphin watching.

Safari is the most common term for wildlife watching tourism. The word "Safari" originates from Swahili and means "journey". When used in English or German in colonial times, it referred to hunting expeditions. Currently the term safari is most often used as a synonym for wildlife watching tourism and refers to tourism taking place mainly in protected areas that offers the opportunity to observe and photograph wild animals in their natural habitats. The classic form of safari entails observing wildlife from four-wheel drive vehicles and staying in tented safari camps or lodges. Newly emerging forms of safari include trekking, kayaking or camel safaris[5].

While safari tours and the above-mentioned specific tourism products may represent the most common forms of wildlife-related tourism, this briefing paper encompasses all kinds of wildlife that may be observed by tourists. The research does not include captive or semi-captive settings of animals such as zoos. This paper aims to showcase the economic value and related characteristics of tourism products that are based on the opportunity to observe wild animals in their natural habitat, as it is this form of wildlife tourism that is threatened by poaching and other environmental detriments.

Furthermore, this paper focuses on non-consumptive forms of wildlife tourism and therefore does not include trophy hunting tourism. Trophy hunting tourism can be a legitimate

1. UNWTO has 49 African Member States (online), available at: http://www2.unwto.org/members/africa.
2. The Dephi method is an interactive method of analysis based on a survey which is conducted in two or more rounds, providing the participants in the second round with the results of the first so that they can alter their original assessment or stick to their previous opinion, (online), available at: www.rand.org.
3. For the following cf. Higginbottom (2004).
4. UNEP/CMS (2006).
5. FTFP (2009); Wikipedia.

and profitable wildlife conservation tool if managed effectively. Nevertheless, against the background of poaching and the illegal trade of wildlife products, the discussion of hunting tourism among stakeholders including nature conservation institutions and the African countries that take different approaches with regards to trophy hunting, remains controversial. Additionally, from both the tourism sector and the consumer perspectives, wildlife watching tours and trophy hunting are separate segments.

2.4 The economic value of wildlife watching tourism

It is important to note that the subject of this briefing paper is the economic value of tourism, most precisely of the wildlife watching market segment, and not the economic value of wildlife itself. The intrinsic value of wildlife and its various contributions to sustainable development and human well-being – including ecological, genetic, social, economic, scientific, educational, cultural, recreational and aesthetic – are manifold and maybe more or equally important as the economic value, but they are not the subject of this paper.

The economic value of tourism can be defined as the result of all economic impacts caused by tourism. These impacts are direct, indirect and induced through the total of tourism expenditures, creation of employment, positive and negative externalities, revenues from taxes and other public charges, foreign exchange earnings and the related multiplier effects[6].

UNWTO Statistics focus on measuring the direct economic contribution[7] of tourism to the national economy. They provide data and indicators on inbound, outbound and domestic tourism, as well as on tourism industries, employment and macroeconomic indicators related to inbound tourism such as for instance, the contribution of tourism to GDP. The inclusion of the full economic benefits of tourism[8] into UNWTO Statistics is currently under discussion[9].

Analyzing the economic value of the wildlife watching tourism market segment in Africa faces some of the following challenges[10]:

1. The availability of national tourism statistics for African countries is quite limited and refers to the direct economic contribution of tourism. At the national level, data on international tourist arrivals and international tourism receipts are available for the majority of countries. However, data on employment or tourism industries or indicators on the average length of stay and the average expenditure per day are being reported for only a small number of African countries[11]. In addition, Tourism Satellite Accounts (TSA)[12] are only available for a limited number of African countries.

2. Where data are available at national level, they mostly refer to the whole tourism sector, regardless of the different travel purposes. A few countries account indicators according to three different travel purposes, i.e. leisure, business, visiting friends and relatives (VFR) and others; but different segments of tourism such as beach tourism, nature tourism, cultural tourism or wildlife-related tourism are not identified.

3. Data on the tourism expenditure of wildlife watching tourism at the destination level are not collected systematically, or, where data are generated by registrations, surveys or studies, these are often not published.

The review of the literature and case studies revealed that there are numerous studies, projects and publications analyzing wildlife watching tourism. Although the economic value of wildlife watching tourism is usually referred to as important, the reviewed literature focuses mainly on how the economic value could be evaluated and points out that there are no valid data available for such analysis. The very few studies that eventually gathered concrete economic figures on the segment were based on very specific locations and demonstrate that the economic value of wildlife watching tourism can reach significant dimensions. They also reveal that, while the economic potential of wildlife watching tourism might be underestimated, the realization of its benefits in terms of tangible impacts on local economies and pro-poor benefits can only be achieved if tourism development is participatory, well-planned, managed and monitored, and follows the principles of sustainability.[13]

2.5 The survey

Given the scarcity of data at the national level for the region as well as the absence of relevant statistical information for the segment of wildlife watching tourism, UNWTO fielded a survey among relevant stakeholders. Specific questions addressing the number of arrivals to protected areas and related receipts were included in the survey. The existing official data on international tourism arrivals and receipts was used as a benchmark against which the results of the survey were contrasted (the available data on international tourism arrivals and receipts can be found in annex 2).

The survey was distributed to national tourism authorities, protected area and wildlife conservation authorities and individual protected areas. With the objective of accessing relevant data on the wildlife watching tourism segment potentially available at the national and local level, a selection of questions related to key economic indicators and characteristics of wildlife watching tourism were included in the survey. Moreover, international and African tour operators were surveyed to describe the supply side of wildlife watching tours.

The survey was conducted following a consultative process with various tour operator associations via online questionnaires from 26 February to 15 April 2014. A second round of consultations with tour operators focusing on validating the findings took place during May 2014 using the Delphi method.

The following four specific versions of the questionnaire were developed and sent to governmental institutions and the tourism sector:

– Ministries of tourism and national tourism authorities;

– National and local protected area and wildlife conservation agencies;

– Tour operators from Europe and United States of America (aka 'international tour operators'); and

– African-based tour operators.

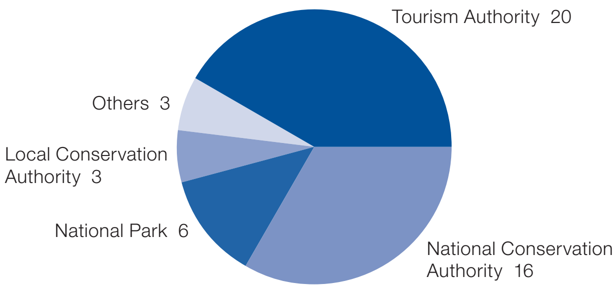
All questionnaires were available in English and French, and in the case of international tour operators, also in German.

2.5.1 Survey participation: governmental institutions

Tourism ministries of all 49 UNWTO African Member States[14] were invited to participate in the survey. The national authorities for protected areas and wildlife conservation were addressed through the national focal points of UNEP/CMS which is a partner in this UNWTO initiative. The UNEP/CMS focal points were asked to forward the survey to relevant conservation institutions and individual national parks (a list of participating governmental institutions can be found in annex 3).

In total, 48 governmental institutions from 31 countries replied, i.e. Benin, Botswana, Burkina Faso, Burundi, Cameroon, Cabo Verde, Chad, Congo, Cote d'Ivoire, Democratic Republic Congo, Eritrea, Ethiopia, Gabon, Gambia, Ghana, Kenya, Lesotho, Malawi, Mali, Mauritania, Mozambique, Niger, Senegal, Seychelles, Sierra Leone, South Africa, South Africa, Swaziland, Uganda, United Republic of Tanzania and Zimbabwe. The sample represents 63% of UNWTO Member States and the respondents include 20 national tourism authorities, 16 national wildlife conservation authorities, three local wildlife conservation authorities, six individual national parks and three other institutions. The balanced response of both governmental branches can be interpreted as a sign of their shared interest in the topic.

Figure 2.1 Survey participants: governmental institutions

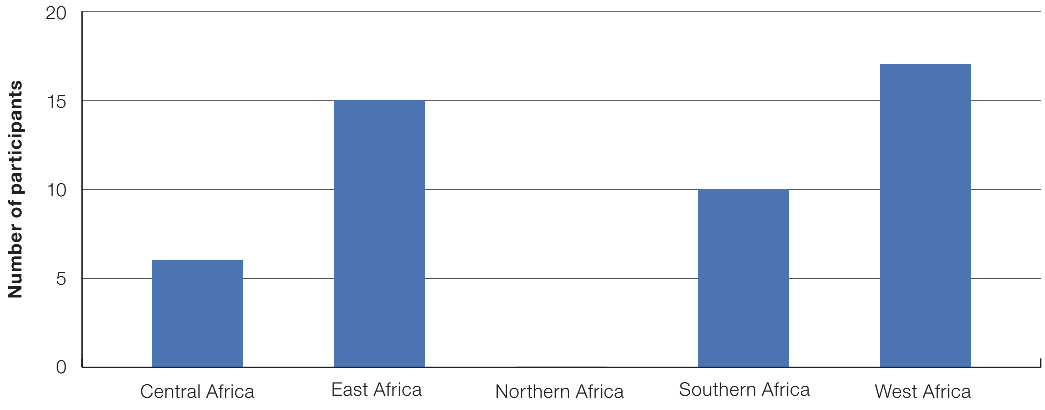


Governmental institutions, n = 48

The participating governmental institutions are from four African sub-regions – six participants from five Central African countries; 15 participants from 10 East African countries; 10 participants from four Southern African countries and 17 participants from 12 West African countries. There were no participating countries from Northern Africa. For nine countries (Democratic Republic of Congo, Ghana, Kenya, Lesotho, Senegal, South Africa, Swaziland, Tanzania and Uganda), replies were received from both the governmental branches of tourism and protected area and wildlife conservation.

6. Smith (1998); Freyer (2011).
7. Tourism Economic Contribution is understood as the direct, positive effects of Tourism Consumption, Tourism Gross Fixed Capital Investment and Tourism Collective Consumption on a national economy. This includes the Tourism Satellite Account (TSA) measures of Tourism Direct Gross Value Added, Tourism Direct Gross Domestic Product (GDP), and Employment in the tourism Industries consistent with the System of National Accounts. (UNWTO, 2011).
8. Tourism Economic Benefits are defined as the Tourism Economic Contribution plus the secondary effects (including both indirect effects and induced effects) on the national economy. (UNWTO, 2011).
9. UNWTO (2011).
10. cf. Higginbottom(2004).
11. This absence of detailed economic data on tourism is not restricted to Africa; it is common for many countries worldwide. (UNWTO, 2014c, UNWTO, 2014d).
12. The TSA is a distinctive method of measuring the direct economic contributions of tourism consumption to a national economy. It is a macroeconomic policy analysis tool. (UNWTO, 2011).
13. cf. Higginbottom (2004).
14. UNWTO has 49 African Member States: Algeria, Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Cabo Verde, Central African Republic, Chad, Congo, Côte d'Ivoire, Democratic Republic of Congo, Djibouti, Equatorial Guinea, Eritrea, Ethiopia, Gabon, Gambia, Ghana, Guinea, Guinea-Bissau, Kenya, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mauritius, Morocco, Mozambique, Namibia, Niger, Nigeria, Rwanda, Sao Tome and Principe, Senegal, Seychelles, Sierra Leone, South Africa, Sudan, Swaziland, Togo, Tunisia, Uganda, United Republic of Tanzania, Zambia and Zimbabwe, (online), available at: http://www2.unwto.org/members/africa.

Figure 2.2 Survey participants: Governmental institutions by sub-regions



Governmental institutions, n = 48

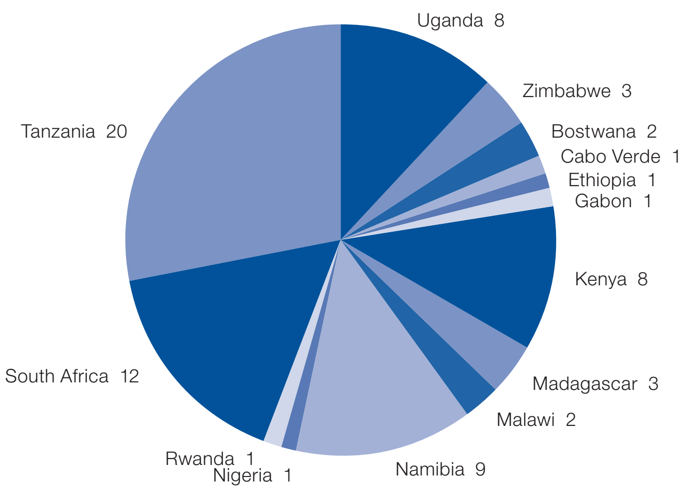
2.5.2 Survey participation: tour operators

Fifty-eight tour operator associations from 27 European and American countries and 12 African countries were contacted and requested to forward the survey invitation to their members. 17 responded positively and supported the survey (a list of the supporting tour operator associations can be found in Annex 4). In addition, about 700 individual tour operators from 38 countries were contacted directly and invited to participate in the survey.

A total of 159 tour operators from 34 countries replied to the survey. Tour operators were from Australia, Bangladesh, Botswana, Canada, Cabo Verde, Croatia, Czech Republic, Denmark, Ethiopia, Finland, France, Gabon, Germany, India, Italy, Kenya, Lithuania, Madagascar, Malawi, Namibia, Netherlands, Nigeria, Peru, Portugal, Republic of Korea, Rwanda, South Africa, Spain, Switzerland, Uganda, United Kingdom, United Republic of Tanzania, United States of America and Zimbabwe (a detailed list of the tour operators participating is given in Annex 5). 14 of the international tour operators surveyed do not offer trips to Africa and were therefore excluded from further analysis. The remaining 145 tour operators are from 31 countries; 72 are based in Africa and 73 in Europe, North America, Asia and Oceania.

Among the African tour operators, a majority of the participants are from countries that are well-known wildlife watching destinations such as Tanzania (20 participants),

Figure 2.3 Survey participants: African tour operators by countries of origin



African tour operators, n = 72

South Africa (12 participants), Namibia (9), Uganda (8) and Kenya (8). Zimbabwe and Madagascar are represented by three participants each, Botswana, Cabo Verde, Ethiopia, Gabon, Malawi, Nigeria and Rwanda by either one or two participating tour operators each.

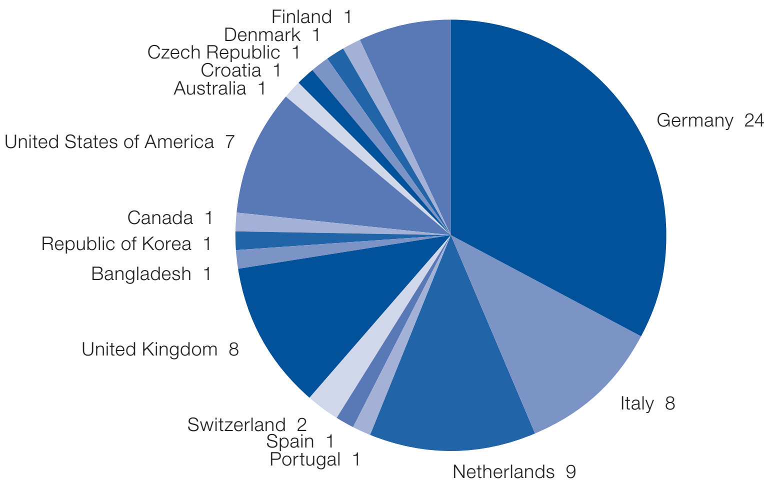
The majority of the participating international tour operators are from Europe (62 out of 73), mainly from Germany (24), The Netherlands (9), Italy (8), United Kingdom (8), France (5) and another four European countries. The high participation of European tour operators is linked to the fact that these are the main source markets for Africa and thus greater emphasis was placed in ensuring participation. Additionally, eight of the tour operators participating are from United States of America and Canada, two from Asia (Bangladesh and Republic of Korea) and one from Australia.

2.5.3 Size of participating tour operators

Out of the 145 tour operators that offer trips to Africa who responded, 140 provided information on their size[15]: 51% fall into the category of micro-enterprises having less than 10 employees; 32% are considered small enterprises with 10 to 50 employees; 10% correspond to medium enterprises with 50 to 250 employees, and; 7% are large enterprises with more than 250 employees. In total, 93% of the participating tour operators are considered MSMEs. It should be noted that from the large enterprises, 2 tour operators employ more than 6,000 employees.

15. The classification of enterprises per size used by the European Commission has been followed, (online), available at: http://epp.eurostat.ec.europa.eu/portal/page/portal/european_business/special_sbs_topics/small_medium_sized_enterprises_SMEs.

Figure 2.4 Survey participants: International tour operators by countries of origin



International tour operators, n = 73

3.
Analysis of the surveys

The following section presents the analysis of the results of the surveys (the questionnaires can be found in Annex 6).

3.1 Characteristics of wildlife watching tourism

3.1.1 Safari is the most practiced type of wildlife watching tourism

Governmental institutions were asked about the type of wildlife watching that can be practiced in their countries through a multiple choice question: a) safari (Big Five and others); b) great apes (chimpanzee, gorillas); c) marine wildlife (including whale watching); d) bird watching; e) special wildlife tracking, and f) others. Additionally, tour operators were asked about the kinds of wildlife watching tours that they offer and the countries in which they operate.

All participating governmental institutions from 31 different countries answered this question. A total of 92% of the respondents mention that bird watching can be practiced in their country; 73% state this for safari; 35% state this for the observation of great apes; 45% state this for marine wildlife watching; 38% state that special wildlife tracking; and 29% state this for other kinds of wildlife watching tours.

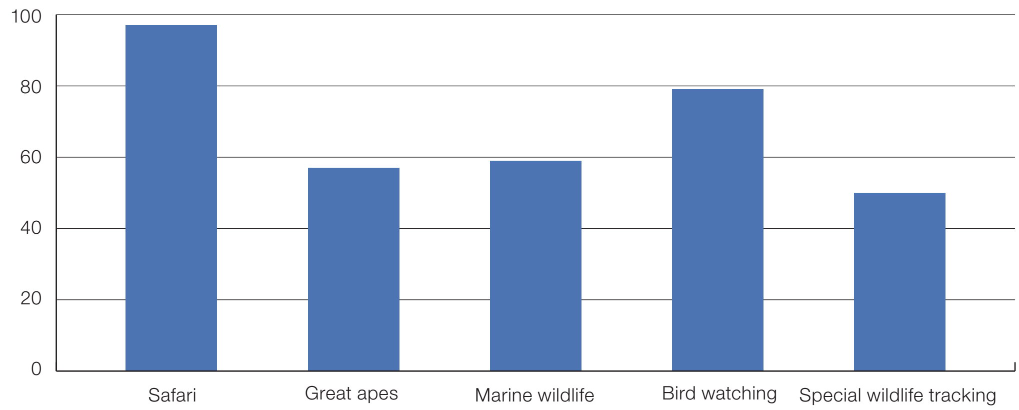
Analyzing the replies from the participating tour operators, bird watching is offered in 71% of African UNWTO Member States, safari tours in 65%; special wildlife watching in 49%; marine wildlife watching in 33%; observation of great apes in 24%; and other kinds of wildlife watching in 61%.

A total of 25 countries were mentioned by both the governmental institutions and tour operators as wildlife watching destinations. When comparing the public and private answers for the same country, it was noted that in a majority of cases (67%) those countries highlighted by the governmental institutions as wildlife watching destinations were also viewed by the tour operators. The biggest discrepancy between the answers of governmental institutions and tour operators related to the practice of bird watching. Bird watching was reported as available by governmental institutions in 92% of their countries, but was only highlighted by tour operators as being practiced in 71% of African countries. This discrepancy could be linked to the fact that although bird watching can be practiced in almost every African country, tour operators might often combine it with other activities rather than offer it as a specialized product and therefore the number of countries in which they view themselves operating is smaller.

The other discrepancy between responses related the percentage of countries that were considered in the replies of governmental institutions as wildlife watching destinations that were not considered as such by tour operators. Upon review, this group of countries fall into two general categories. Firstly, countries where despite the availability of natural resources, tourism is in its initial stages of development and secondly, countries that are specialized in a different type of product, such as beach and sun holidays.

All in all, 96% of the 145 tour operators participating offer safari tours; 56% offer tours focusing on the observation of great apes; 57% offer marine wildlife tours; 80% offer bird watching tours; 48% offer special wildlife tracking tours; and 36% other kinds of tours.

Figure 3.1 Kinds of wildfile watching offered per tour operator (%)



Tour operators, n = 145

The results of the survey show that those countries in which a higher number of tour operators are active, are countries that are already known as wildlife watching destinations. Between 54%-61% of the 145 participating tour operators offer wildlife watching tourism products in each of the following countries: Botswana, Kenya, Namibia, South Africa and Tanzania. Data indicates that the main wildlife watching product are safari tours, offered by 55% of the tour operators, followed by bird watching (offered by 31%) and tours for the observation of marine wildlife, currently offered by 16% (this product is not available in Botswana).

Countries where wildlife watching tours are operated by 22%-50% of the participating tour operators are Madagascar, Malawi, Mozambique, Rwanda, Uganda, Zambia and Zimbabwe. For this second cluster of countries, the main product is also safari, which is being offered by 22% of the tour operators, followed by bird watching (offered by 18%) and tours for the observation of great apes which is offered by 11% (this product is only available in Rwanda and Uganda).

Between 5% and 18% of the tour operators offer wildlife watching tourism products in Congo, Ethiopia, Lesotho, Mauritius, Morocco, Senegal, Seychelles and Swaziland. Nineteen more countries are mentioned as wildlife watching destinations. This leaves out only 10 of the 49 UNWTO Member States in Africa without being mentioned as destinations for wildlife observation for the participating tour operators. However, it is important to note that this last group includes post-conflict countries and countries with very limited tourism development.

3.1.2 Locating wildlife watching tourism

When answering the question "does wildlife watching in your country/during your tours take place in protected areas?" a total of 96% of the participating governmental institutions and tour operators replied positively. Additionally, when listing the top five destinations for wildlife watching in their respective country, governmental institutions refer almost exclusively to protected areas. Some tour operators mention that wildlife watching tourism also takes place on private and communal lands, but to a much lesser extent.

From a sub-regional perspective, it is interesting to note that most of the activities of the 145 participating tour operators are taking place in East Africa (90% of the tour operators operate in the sub-region) and Southern Africa (66% of the tour operators operate in the sub-region[1]). In both sub-regions, the main products offered are safari followed by bird watching. The third most popular products are the observation of the Great Apes in East Africa and marine wildlife watching for Southern Africa. These two sub-regions also obtained the highest number of replies from their respective governmental institutions when they were asked to highlight the resources available in their countries (80% and 73% respectively); a correlation which could reflect the efforts of both the regions to create an enabling framework for the development of wildlife watching tourism.

West and Central African governmental institutions were asked if wildlife watching tourism takes place in their respective country, of which the replies were 73% and 44% respectively. However, as tour operators confirm this only with 14% and 19% respectively for the sub-regions, these figures can suggest rather the commitment of governmental institutions from West and Central Africa to opt for and develop wildlife watching tourism, which has not yet made it into the distribution channels.

In the Northern African sub-region no governmental institutions and only 2% of the tour operators mentioned wildlife watching tourism as a product on offer. This coincides with the fact that Northern African destinations are traditionally placing greater efforts in the development of other tourism products such as beach and sun as well as cultural tourism.

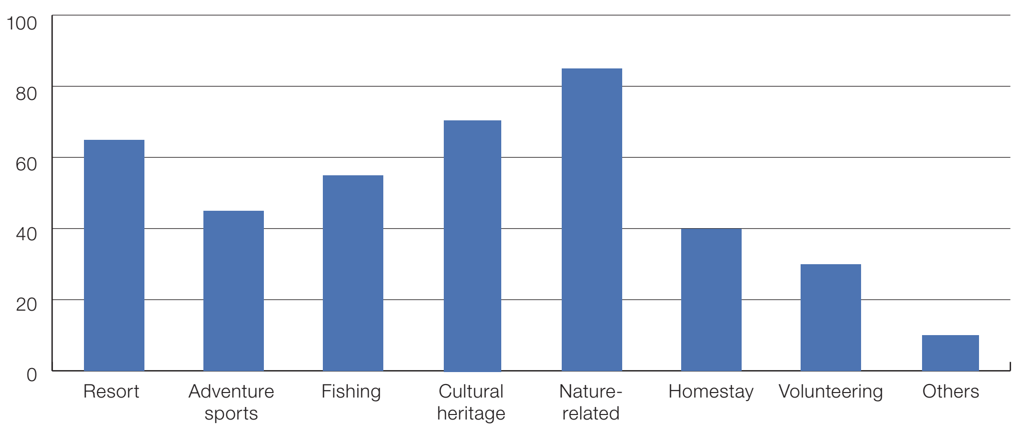
3.1.3 Wildlife watching takes place in combination with other tourism activities

National tourism authorities[2] were asked about the opportunities to combine wildlife watching with other activities in their countries as well as about the types of activities that are normally combined with wildlife watching through a multiple choice question including the following options: a) Resort; b) Adventure sports; c) Fishing; d) Cultural heritage; e) Nature-related activities; f) Homestay; g) Volunteering; h) Others. Additionally, tour operators were asked about the additional activities that are included in their wildlife tours.

A total of 23 governmental replies were received for this question out of which 90% indicate that wildlife watching tourism is indeed being combined with other activities. Most commonly wildlife watching is combined with nature-related activities (85%), followed by cultural heritage (70%) and resort/beach holidays (65%). Fishing, adventure sports such as dune surfing or kayaking. Homestay and volunteering are less frequently mentioned as activities typically combined with wildlife watching tours.

For the 145 participating tour operators, the most important additional activities included in their tours are cultural visits (history, architecture, tribal and village culture, wine tasting, city tours etc.), other nature-related and adventure/sports activities (including mountaineering, hiking, trekking, 4x4 drives, mountain biking, golf, scuba diving, snorkelling, kayaking, canoeing, white water rafting, etc.).

Figure 3.2 Activities combined with wildlife watching tours (%)



Governmental institutions, n = 23

Case Studies (1)

Bird watching in South Africa

In 1997, a quantitative study on avitourism to South Africa conservatively estimated that the country received between 11,400 and 21,200 birdwatchers per year which contributed US$ 12 to 26 million to the South African economy (Turpie & Ryan, 1998; cited after Biggs et al., 2011). South Africa is a well-known bird watching destination with a diversity of bird habitats and a high number of endemic species. Since 1997, there has been a significant increase in bird watching tourism in South Africa, reflected in the increasing number of tour operators specializing in birding and the number of bird watching tourism products being offered. The market has undergone considerable growth and the number of bird watching tourists and revenues generated by this market segment have only continued to increase to date. The development of birding tourism has been promoted by community projects supported by NGOs from the tourism sector. Currently, there are more opportunities for small business development along birding routes, which contributes to the creation of jobs for local communities (e.g., local birding guides) and supports conservation. (Biggs et al., 2011).

1. UNWTO African sub-regions are: Central Africa (Angola, Cameroon, Central African Republic, Chad, Congo, Democratic Republic of Congo, Equatorial Guinea, Gabon and São Tome and Principe); East Africa (Burundi, Djibouti, Eritrea, Ethiopia, Kenya, Madagascar, Malawi, Mauritius, Mozambique, Rwanda, Seychelles, Tanzania, Uganda, Zambia and Zimbabwe); Northern Africa (Algeria, Morocco, Sudan and Tunisia); Southern Africa (Botswana, Lesotho, Namibia, South Africa and Swaziland); and West Africa (Benin, Burkina Faso, Cabo Verde, Côte d'Ivoire, Gambia, Ghana, Guinea, Guinea-Bissau, Liberia, Mali, Mauritania, Niger, Nigeria, Senegal, Sierra Leone and Togo).
2. The question was only addressed to the tourism authorities and not included in questionnaire of the conservation agencies.

Mountain Gorillas in Uganda

In the Bwindi Forest National Park in Uganda, mountain gorilla families that are accustomed to humans can be visited by small tourist groups for one hour with a special guide. The permit to visit a gorilla family costs between US$ 500 and 700 per person. The visits to a single gorilla family that attracts an average of 10 tourists in a day generates between US$ 5,000 and 7,500 per day. Over a year's time, visits to this same family can generate up to about US$ 500,000 per year (visits are not made every day).The total income of gorilla visits in the Bwindi Forest National Park is about US$ 15 million per year. Additionally, a similar amount is spent by the tourists on accommodation, transport and other services. (Lengefeld, 2013).

Kichwa Tembo Masai Mara Tented Camp, Kenya

The tented camp Kichwa Tembo Masai Mara is located on the Masai Mara Nature Reserve in the remote western Mara in Kenya's southwest. The main attractions are the year-round concentration of wildlife and the camp's location on the route of the Great Migration. As it is a private concession land, bush walks and night drives are allowed. The tented camp offers considerable luxury for a maximum of 80 guests. The camp has about 200 employees, 70% of whom are locals from the Masai Mara region. An average of 60% of the fruits, vegetables and other farm products that are consumed are obtained from local suppliers. The camp also supports local schools, reforestation, environmental education, health, and anti-AIDS programmes. The camp generates total annual revenues of US$ 8 to 10 million, of which US$ 1.5 million is paid directly to local communities for the lease fee, salaries and purchases of local products. (Lengefeld, 2013).

Marine turtle observation

In 2004, a WWF study analyzed the non-consumptive use of marine turtles for observation in 13 locations in the tropics and subtropics of Africa, Asia, Latin America and the Caribbean. In nine of these locations, this activity is considered a major revenue generator while in the other four locations is only one of many attractions. The gross-revenue attributed to marine turtle observations was calculated by multiplying the average tourist expenditure by the number of tourists that participated in this activity. The analysis included all expenditures (food, accommodation, souvenirs, transport and others) made by tourists during their stay at the turtle-watching site. The costs of turtle observation tours were relatively low as little transport and no special equipment were needed. On the other hand, tourists needed to travel to remote beaches and the excursions were undertaken mainly at night, which generates higher travel costs.

At the nine locations where marine turtles were the major attraction, the study showed revenues generated from US$ 41,000 to US$ 6.7 million per site per year, with an average of US$ 1.7 million per year at a single site. The sites employed anywhere from 30 to 1,280 tour guides, and the hostel/resort owners and their employees received direct economic benefits from the turtle-watching tourism. At the four destinations where turtles are only one of many attractions, the revenue from turtle observation ranged from US$ 3,000 to US$ 106,000 per year with an average of US$ 41,000 per year. (Troëng/Drews, 2004).

3.2 Importance of wildlife watching tourism and its main beneficiaries

3.2.1 Nature, national parks and wildlife are among the most important assets for wildlife watching destinations

To better understand the perceived importance of wildlife watching tourism in the African countries surveyed, the national tourism authorities were asked both “how important is wildlife for tourism in your country?” and “is wildlife watching tourism a valuable source of income for your country?” In response, a total of 24 replies were received, out of which 79% state that wildlife watching tourism is “very important” for their countries; 17% state that it is “important” for their countries. 79% found that wildlife watching is a valuable source of income.

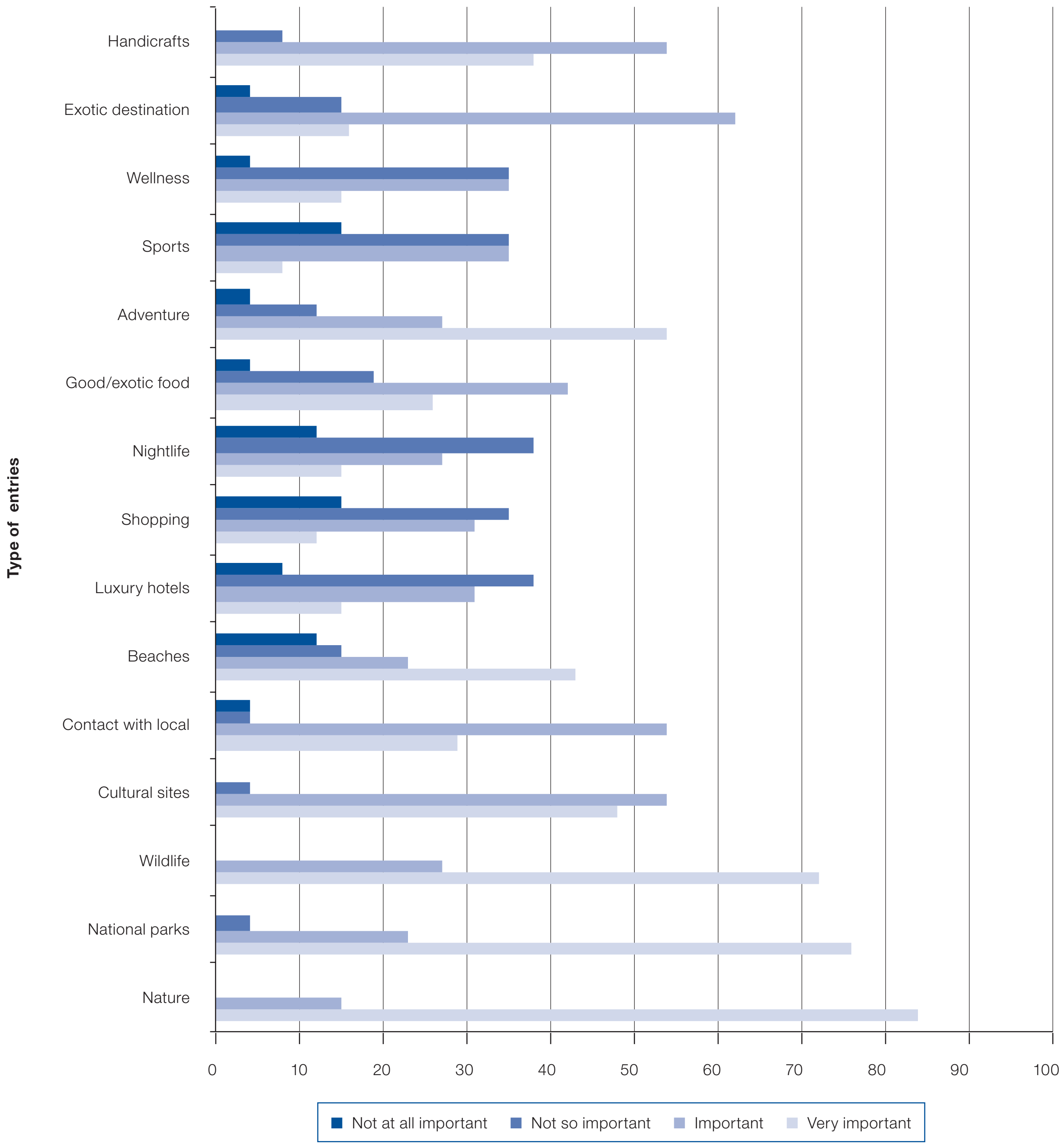
National tourism authorities[3] and tour operators were also asked to highlight the degree of importance for the visitor/ customer of the following items: a) Nature; b) National Parks; c) Wildlife; d) Cultural sites; e) Contact with local community; f) Beaches; g) Luxury hotels; h) Shopping; i) Nightlife; j) Good/exotic food; k) Adventure; l) Sports; m) Wellness; n) Exotic destination; o) Handicrafts.

The 25 governmental replies received reveal that nature, national parks, wildlife, adventure and cultural sites are among the most important assets for the visitors to their countries (rated as “very important” by 84%, 76%, 72%, 54% and 48% of respondents, respectively). Also “important” but to a lesser extent, are beaches (43%), handicrafts (38%), good/exotic food (26%), the contact with local communities (29%). Exotic destinations, shopping, nightlife, wellness and sports are not so important for the tourists from the perspective of the governmental institutions. One participant also mentioned in the comments section that security is an important issue for tourists.

Tour operators were asked the same questions. The 145 replies received from tour operators show that 95% of the respondents evaluate wildlife, nature and national parks as “very important” for their customers (rated 95%, 92% and 87% respectively). Culture, contact with local communities, adventure, exotic destinations, good/exotic food and exotic destinations get high rankings as well (36%, 31%, 31%, 27% and 25% respectively). Beaches, luxury hotels and handicrafts range in the middle, while the majority evaluates shopping, wellness, sports and nightlife as “not so important” or “not at all important”.

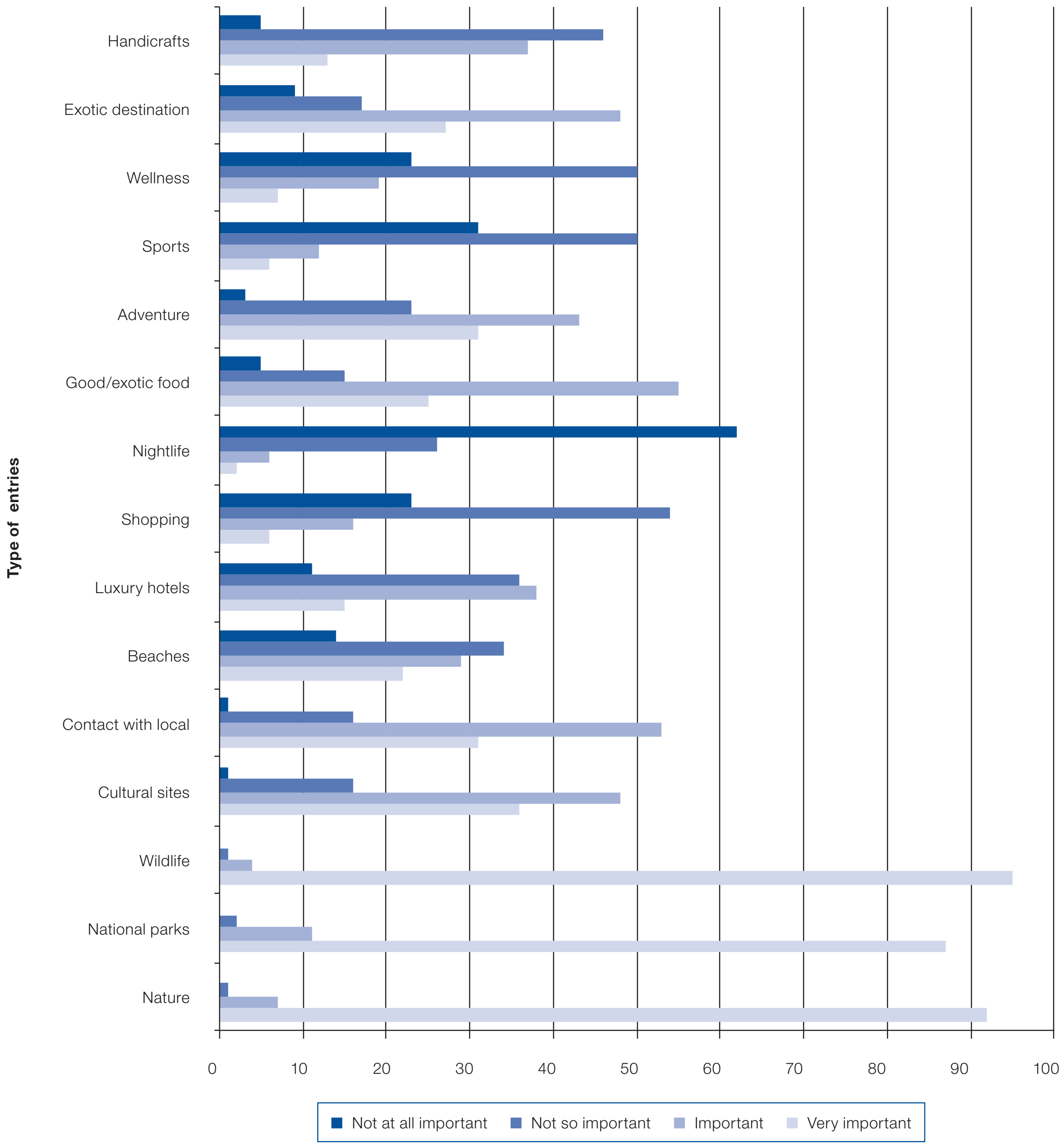
3. The question was only addressed to the tourism authorities and not included in questionnaire of the conservation agencies.

Figure 3.3 Importance of tourism assets for visitors (%)



Governmental institutions, n = 25

Figure 3.4 Importance of tourism assets for customers (%)



Tour operators, n = 145

3.2.2 Wildlife watching tourism benefits a wide range of stakeholders, especially national parks, local tourism providers and the local community

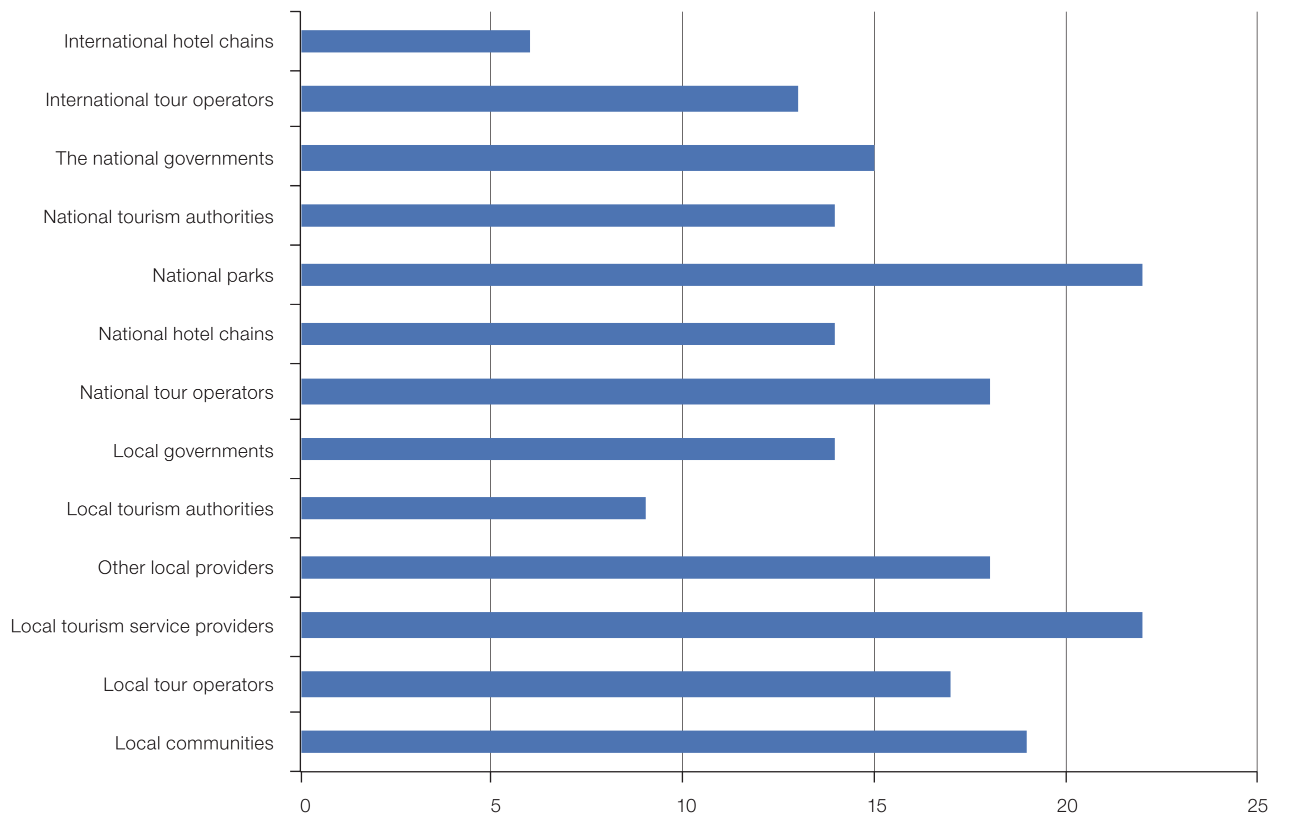
National tourism authorities[4] were asked about who benefits from wildlife watching tourism through a multiple choice question, which gave the following options: a) Local communities; b) Local tour operators; c) Local tourism service providers; d) Other local providers; e) Local tourism authorities; f) Local governments; g) National tour operators; h) National hotel chains; i) National Parks; j) National tourism authorities; k) National governments; l) International tour operators; m) International hotel chains.

The 26 governmental institutions that responded indicated that there is a wide range of beneficiaries from wildlife watching tourism in their countries (the majority selected an average of eight different beneficiary categories from the 13 options proposed). National parks and local tourism providers are mentioned most frequently as beneficiaries (both by 85% of respondents), but also local communities (73%), national tour operators (69%) and other local providers (69%). Between 50% and 58% of the participants state that national and local governments, national tourism authorities, international tour operators and national hotel chains benefit as well. Local tourism authorities are mentioned by 35%, and international hotel chains by 23% of the participants.

Governmental institutions were also requested to indicate whether local communities "receive direct and/or indirect benefits" from wildlife watching tourism by selecting among the following replies: a) Supply of food and beverages; b) Supply of cultural goods and services; c) Supply of other goods and services; d) Proportion of national park fees; e) Proportion of taxes/licenses related to tourism.

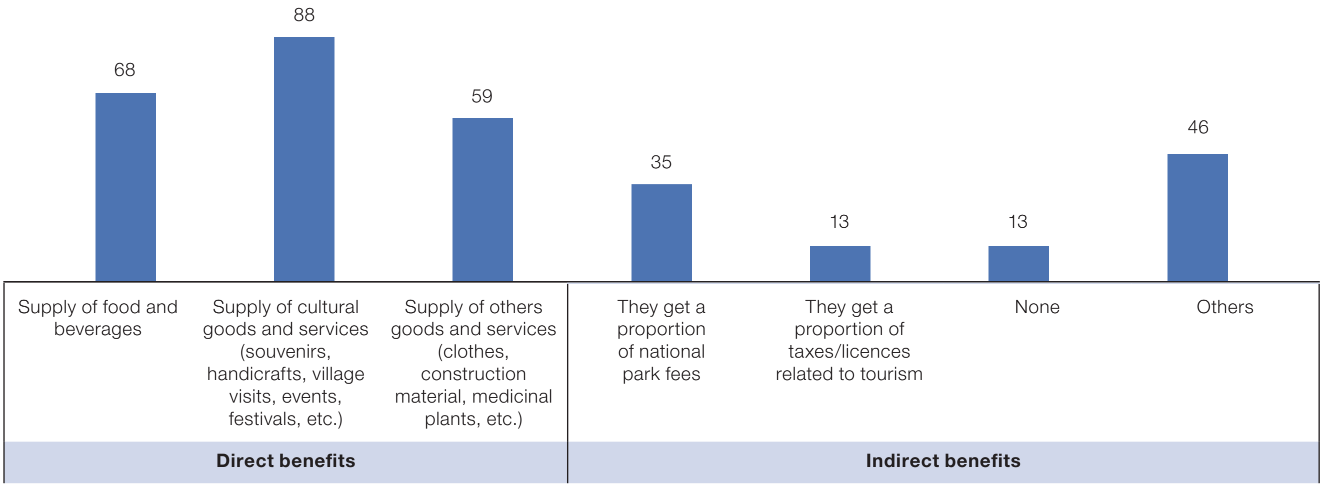
The replies from the majority of the 47 governmental institutions that answered this question indicate that local communities are involved in wildlife watching tourism and obtain direct (72%) and indirect (82%) benefits from it. In most cases, local communities provide different goods and services directly to the tourists, cultural goods and services being the most important ones for the participating governmental institutions (mentioned in 88% of the cases), followed by food and beverages (68%) and other goods and services (59%). With regard to indirect benefits, 35% of the responses from participating governmental institutions

Figure 3.5 Beneficiaries of wildlife watching tourism (%)



Governmental institutions, n = 26 (cases)   Question included only in the questionnaire addressed to Tourism authorities.

Figure 3.6 Direct and indirect beneficiaries for wildlife watching tourism (%)



reported that communities get a proportion of national park fees; 13% mention the proportion of tourism-related taxes or licenses as an indirect benefit for communities, and; 46% of the replies list other indirect benefits. For instance:

– Community development programmes, e.g., education, health, youth, SME development, ecotourism, alternative livelihoods;

– Establishment of infrastructure like water supply and access roads to parks in remote areas;

– Tourism concessions areas allowing for the establishment of self-employed/SME tourism businesses; and

– Nature conservation.

3.2.3 Wildlife watching offers a wide range of employment areas for the local community

Governmental institutions were requested to indicate whether “local communities are employed by tourism service providers that offer wildlife watching tours in your country” and the type of jobs that they are offered through the following multiple choice options: a) Accommodation; b) Restaurants; c) Tour guides; d) Local tour operators; e) Transport; f) Porters; g) Craftsmen; h) Rangers[5]; and i) Others.

A total of 48 governmental institutions replied to this question and 75% of those responses state that members of local communities are employed within the wildlife watching tourism sector. Where the response indicates local community involvement, the most important employment areas are tour guiding (86%), accommodation (83%), restaurants (75%), craftsmen (72%) and rangers (70%). To a lesser extent opportunities for work are provided in transport companies and with local tour operators (61% and 58%). Porters are mentioned by only a small number of participants (36%) but this may be due to the fact that porters are only required for certain forms of tourism that involve challenging and/or overnight trekking in remote areas, e.g., tracking of primates in dense rainforests. Other forms of employment mentioned by the participants are cultural performances, jobs in accounting, security, outreach and communication.

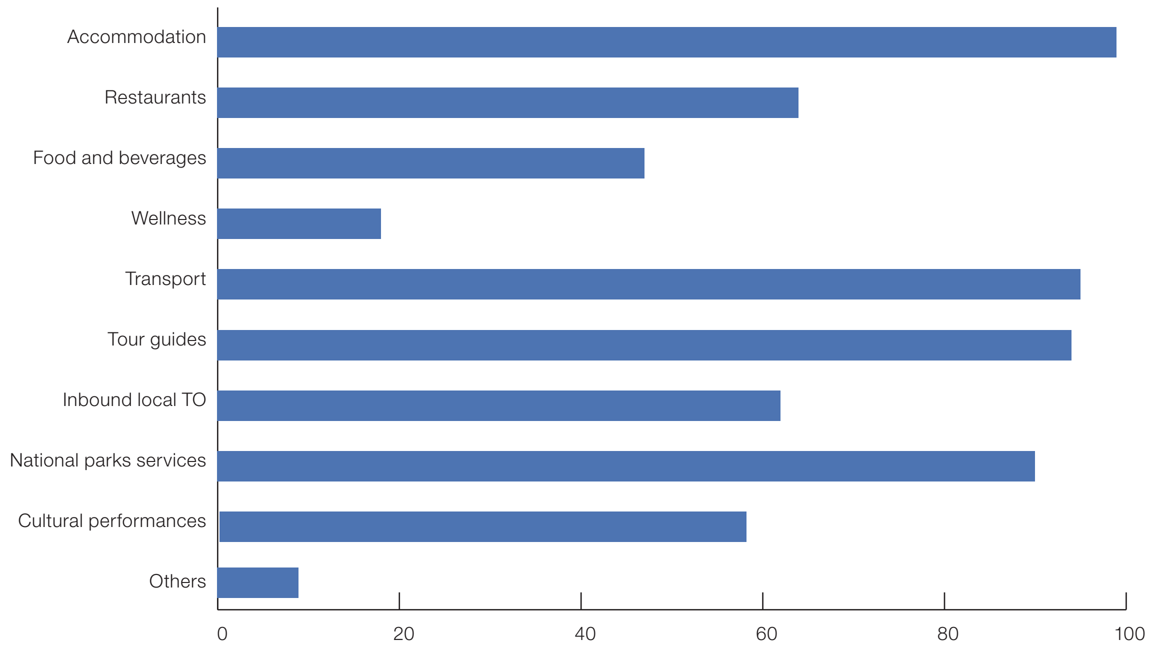
Additionally, tour operators were asked to list the local services that they commonly include in their wildlife watching tours as well as those services that are typically used by their customers but not included in their tours through the following multiple choice answer: a) Accommodation, b) Restaurants; c) Food and beverages; d) Wellness; e) Transport; f) Tour guides; g) Inbound local tour operators; h) National park/protected area service; i) Cultural performances; j) Others.

The responses from the 145 tour operators that replied to this question mention that their wildlife watching tours commonly include accommodation (99%), transport (95%), tour guides (94%) and national park services (90%). Restaurants (64%), local tour operators (62%), cultural performances (58%) and food and beverages (47%) are included to a lesser extent. Wellness services (e.g., beauty treatments, massages) and other services are not commonly included in the tours. Among the other services listed by the participants are sports and adventure activities, meet and greet services, special wildlife permits, luggage service, souvenirs, motorcycle rent and trophy fees.

4. The question was only addressed to the tourism authorities and not included in questionnaire of the conservation agencies.

5. Only the national and local protected area and wildlife conservation agencies questionnaire included “Rangers” among the multiple choice answers and not the national tourism authorities’ questionnaire. 23 governmental institutions answered this question.

Figure 3.7 Local services included in wildlife watching tour packages (%)



Tour operators, n = 145

On the other hand, with regards to the services that their customers typically use in addition to their tour package, all the listed services are mentioned by fewer participants. This could imply that local services are booked through the tour operators rather than purchased by the tourists on-site. Cultural performances/ souvenirs (66%), wellness (63%) and food and beverages (47%) get the highest numbers, followed by restaurants (33%), local tour operators (13%) and national park services (12%). Other services typically used by customers of the participating tour operators but not included in the packages are sports and adventure activities, education, homestay, tips, porter fees and laundry.

3.3 Economic dimension of wildlife watching tourism

3.3.1 Efforts are ongoing in protected areas to monitor wildlife watching tourists, but results are not yet consistent

All governmental institutions were requested to indicate whether they monitor the numbers of wildlife watching tourists through any or all of the following multiple choice options: a) Entrance tickets; b) Official registration forms; c) Surveys; d) Tourist information point; e) Others.

A total of 47 governmental institutions provided an answer and 81% report that numbers of wildlife watching tourists are monitored, in all cases by official registration, entrance tickets sold for protected areas, monitoring tourist information points or similar records. Nevertheless, only six of the national level governmental institutions entered information on the results of these activities and further research would need to be undertaken to ensure their comparability.

Additionally, national and local protected area and wildlife conservation agencies were asked the question "do tourists visit your national park mainly for wildlife watching or do they come for other activities?" offering the following multiple choice options: a) 100% of visitors come to observe wildlife; b) Visitors come to observe wildlife and for other nature-related activities; c) Visitors come mainly for other nature-related activities.

A total of 24 national and local wildlife and conservation agencies provided an answer that 38% reporting that 100% of the visitors to protected areas come to observe wildlife; 54% visitors come to observe wildlife and for other nature-related activities, and 8% visitors come mainly for other nature-related activities.

In the absence of regular statistical records of the number of wildlife watching tourists, the number of protected area visitors and receipts is valuable information for the evaluation of the importance of wildlife watching tourism for a country or a destination and therefore the questionnaires addressed to governmental institutions included detailed questions in this regard.

Governmental institutions from 14 countries entered data on the number of protected area visitors and receipts. Based on the results, three groups of countries can be distinguished according to their visitor numbers:

1. Countries with a major number of visitors in protected areas: between 2 and 5 million visitors per year. It is estimated that these countries have receipts up to US$ 90 million. (Kenya, South Africa).

2. Countries with a medium number of visitors in protected areas: between 100,000 and over 500,000 visitors per year. It is estimated that they have receipts between US$ 2 and 15 million. (Ethiopia, Lesotho, Swaziland, Tanzania, Uganda and Zimbabwe).

3. Countries with a limited number of visitors in protected areas: between 1,000 and 90,000 visitors per year. It is estimated that they have receipts between US$ 20,000 and 700,000 per year. (Burkina Faso, Chad, Cote d'Ivoire, Democratic Republic of Congo, Ghana, Niger).

According to the survey replies, protected area receipts from the 14 above-mentioned countries would total US$ 142 million per year. When using the total number of visitors in combination with the average entry fees provided for the same calculation, the total protected area receipts for the same countries would add up to US$ 168 million per year.

It should be noted that the replies related to protected area visitors and receipts of protected areas are spread over a very large range. This could be linked to the different circumstances of the participating countries. Nevertheless, further research would be required to validate and complement these data and therefore, only estimations are being presented.

3.3.2 Wildlife watching represents 80% of the total annual sales of trips to Africa and sales are increasing

The tour operators were asked to describe their business performance to provide information about the following items: a) the number of tours sold that includes wildlife watching; b) the number of customers on tours that include wildlife watching; c) the percentage of their product portfolio that wildlife watching tours represent; d) their annual sales, and; e) the sales trends.

From the participating 145 tour operators, depending on the question, between 105 and 123 entered data related to the number of tours, customers and percentage of their product portfolio that wildlife watching represents. In total, the tour operators participating represented more than 26,500 tours per year[6], with the biggest seller selling 3,000 and the smaller seller selling 1 tour per year. The average tours sold is 181 tours per year per tour operator. However, this figure is not representative for the whole sample of respondents due to the difference in sizes of the tour operating companies (83% of the respondents are MSMEs) and therefore, the data has been split depending on the size of the tour operator in the table below.

	Micro	Small	Medium	Large
Tours sold including wildlife[7]	4,076	9,656	7,337	4,323
Share of wildlife tours out of all tours sold with Africa as a destination	76%	70%	72%	66%
Number of tour operators replying	57	43	11	6
Average number of tours sold annually per operator	72	225	667	721

Participating tour operators sold tours to more than 144,000 customers per year. The range started as low as 2 customers and reached 13,500 customers per year per tour operator, with an average of 1,203 customers per year per tour operator. In the following, data is provided related to the size of the tour operating companies (82% of the respondents are MSMEs).

6. Replies totalled in 26,783 tours.

7. In order to calculate the breakdown of tours per size of tour operator, only the entries from tour operators which had provided information on their size was used.

	Micro	Small	Medium	Large
Customers booking wildlife[8]	17,167	50,621	44,135	25,236
Share of wildlife tours out of all tours sold with Africa as a destination	78%	77%	65%	62%
Number of tour operators replying	57	40	12	5
Average customers annually per operator	301	1,266	3,678	5,047

All in all, wildlife watching represents a high percentage of the participating tour operators' product portfolio (73%) and clients (75%).

A total of 83 tour operators provided data on annual sales from wildlife watching tours, which totaled US$ 263 million. When analyzing the annual revenue from wildlife watching tours by tour operator size, it was discovered that out of the sample, 52% are micro enterprises which have annual sales of US$ 47 million in total (average per company is US$ 1 million); 31% of the sample is comprised of small enterprises which have annual total sales of US$ 92 million (average per company is US$ 3.5 million); 12% of the sample is composed of medium enterprises with annual sales of US$ 48 million (average per company is US$ 5 million), and; 5% of the sample is represented by large enterprise with annual sales adding up to US$ 70 million (average per company is US$ 17.5 million).

In total, wildlife watching tours represent 88% of the total annual revenues of trips to Africa for the participating tour operators. Interestingly, 20% of the participating tour operators sell only wildlife watching tours.

The majority (60%) of the 140 participating tour operator respondents state that the sales of wildlife watching tours have been increasing over the last five years. Another 24% find the situation stable and only 16% experienced a decrease in the wildlife watching tours sold in the same period. Some of the participants state that the reasons for decreased demand most probably link to the financial crisis and recession in North America and Europe. However, security issues, poaching and negative media coverage are also mentioned as factors influencing the decrease of arrivals.

3.3.3 The average price per person per day of a standard wildlife watching tour is US$ 243 and US$ 753 for a luxury wildlife watching tour

Tour operators were also asked to elaborate on the following key economic indicators: a) average size of groups; b) average length of stay; c) average tour price per day (excluding flights), and; d) average additional out-of-pocket spending per day.

Replies provided by the tour operators have been analyzed by splitting them into the two main segments, i.e. standard tours and luxury tours. This segmentation was done based on data provided and validated with each operator. Key economic indicators were provided by 114 to 128 tour operators. 128 tour operators replied to the second round of consultations which intended to confirm some initial results.

Out of the 128 tour operators that participated in the second round of consultations, 42% are specialized in the "standard" segment while 28% are specialized in the "luxury" segment. Another 30% positioned themselves in both segments targeting customers from the "standard" and the "luxury" markets.

The data of the survey suggests that the average number of participants in a wildlife watching tour is 6 persons, though the number of participants can range from 1 to 30 persons. In the "standard" market segment the average number of participants per tour is 7 and can range from 2 to 30 persons. In the "luxury" market segment the average number of participants per tour is 5 and ranges from 1 to 24.

The average length of stay for a typical wildlife watching tour from the overall sample (128 tour operators) is 10 days. In the "standard" market segment the average length of stay is 11 days; the range starts at half a day and reaches up to 42 days. In the "luxury" market segment the average length ranges from a day and half to 18 days.

The average daily price (excluding flights) for a wildlife watching tour from the overall sample (128 tour operators) is US$ 433. In the “standard” market segment the average price per day for a wildlife watching tour is US$ 243 and ranges from US$ 86 to 500 per day. In the “luxury” market segment the average price per day of a wildlife watching tour is US$ 753 and ranges from US$ 179 to 2,500 per day.

As the average number of participants and the average length of stay for both the luxury and standard segments are very similar, it can be concluded that they are intrinsic characteristics to the wildlife watching product that do not necessarily relate to the level of comfort of the experience. The indicator that clearly differentiates the segments is the average daily price, and this clearly works to identify which market the tour operators are targeting. It is important to note that within the African region the prices for both the “standard” and the “luxury” segments vary in each country depending on the level of tourism development of the destination and the size of the market offer.

Based on the overall responses, the average daily additional out-of-pocket spending from the full sample (128 tour operators) is US$ 55. In the “standard” market segment the average the reported additional spending per day is US$ 44, with additional spending ranging from US$ 7 to 250 per day. In the “luxury” market segment the average additional spending per day is US$ 59 with a range of US$ 1 to US$ 104.

The typical wildlife watching tour

Average number of participants:
6

Average length of stay:
10 days

Average tour price per day:
US$ 433 per person

Average out-of-pocket spending per day:
US$ 55 per person

8. In order to calculate the breakdown of customers per size of tour operator, only the entries from tour operators which had provided information on their size could be used.

Case Studies (2)

Serengeti-Ngorongoro Circuit, Tanzania

According to a study conducted in 2009, the southern circuit at Serengeti-Ngorongoro receives 300,000 tourists per year on the 300 km stretch between Arusha and Serengeti. The total inbound tourism expenditure generated at this destination is US$ 500 million per year, which is more than half of Tanzania's foreign exchange earnings from tourism. The price of a typical wildlife watching package is US$ 1,600 for 6 days/ 5 nights (US$ 320 per day). Additionally, tourists spend an average US$ 226 out-of-pocket (US$ 37/day).

Among the local tourism providers that benefit from this income are tour operators and providers of accommodation, parking, transport, cultural goods and services as well as food and beverages. Along the safari circuit there are about 3,500 crafts and souvenir stalls that employ 7,000 sellers and 21,000 crafters. About US$100 million per year (19% of the earnings) are considered pro-poor, meaning that they reach local people via wages and tips when they are employed by tourism providers. Furthermore, local small producers provide about half of the food consumed at the circuit. The local population obtains indirect benefits from tourism through funds allocated by the protected area management to the communities.

Together with the second part on Kilimanjaro tourism, the 2009 study reveals that Tanzania captures about half of the total value of the global value chain for a package holiday sold in Europe. The great majority of the inbound tour operators and tourism providers are owned by Tanzanians. Foreign companies are not common but pay significantly higher wages than local companies. The benefits of tourism at Serengeti-Ngorongoro could be enhanced by establishing better linkages between accommodations and local food producers as well as capacity building to foster local employment in the tourism sector and to increase the margins of the craft sector. (Steck/ODI, 2009).

Economic impact of nature tourism in Zambia

In Zambia, tourism is one of the fouressential sectors identified for sustainable development. Yet, the economic impact of nature tourism has been underestimated. In 2005, tourism was characterized by a small and fragmented private sector, inconsistent policies, weak incentive structures, poor business climate, limited fiscal support of the tourism sector and lacking financial resources of the Zambia Wildlife Authority and the Ministry of Tourism. Even under such unfavourable circumstances, a World Bank study showed that the economic impact of nature tourism is significantly higher than previously perceived.

In 2005, only 26% of international tourist arrivals were nature-tourists, but these 176,000 visitors realized an export value of tourist spending of US$ 194 million which is 3.1% of the direct GDP. Summing up direct and indirect linkages, the 176,000 nature tourists contributed nearly 16% of Zambian exports and 6.5% of the GDP, more than 6% of wages and net income of unincorporated business, 7% of government revenues and nearly 10% of formal sector employment (54,000 formal jobs). The fiscal revenues generated in 2005 by international nature tourists visiting national parks were about US$ 5 to US$ 8 million, meaning that the revenues exceeded by far the US$ 1 million in funds allocated to the Zambia Wildlife Authority in the same year.

In 2007, approximately 206,000 international tourists (30% of overall international tourist arrivals) came to Zambia to experience Victoria Falls, wildlife and nature-based activities. Considering the many challenges the tourism sector in Zambia was facing in 2005, the opportunities for developing nature and wildlife tourism and enhancing the benefits of tourism are growing. Tourism, and specifically nature and wildlife tourism, can be an important source of revenues and employment if appropriate revenue-sharing mechanisms are put in place to enhance the benefits for local communities and pro-poor impacts of tourism. (Hamilton et al., 2007).

3.4 Effects of poaching on tourism

3.4.1 Nature conservation and wildlife are managed but with many shortcomings

Governmental institutions and tour operators were requested to evaluate nature conservation and wildlife management in their countries or the countries in which they operate through a multiple choice answer: a) Very well managed; b) Well managed; c) Managed but there are many shortcomings; d) Poorly managed or not at all.

Of the 23 governmental institutions that answered this question, 57% of the responses indicate that nature conservation and wildlife are “managed but with many shortcomings”, 26% state “well managed”, 17% reply “very well managed”. “Poorly managed or not at all” was not mentioned in the replies.

Of the 144 tour operators that answered this question, 51% state that nature conservation and wildlife are “managed but with many shortcomings”, 31% reply “well managed, 13% state “very well managed”, while 5% reply with “poorly or not at all”.

The quite similar assessment indicates that nature conservation and wildlife are equally important from a conservation but also tourism sector perspective. In their replies, many tour operators singled out poaching as the biggest threat to wildlife.

3.4.2 Poaching has a negative impact on the tourism experience

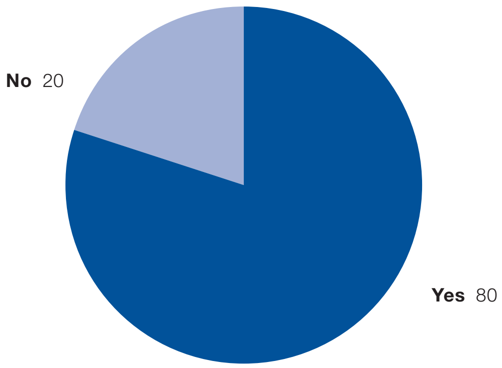
Governmental institutions were requested to indicate whether there are problems with poaching in their respective countries and which animals are being poached among the following: a) terrestrial mammals; b) marine wildlife; c) birds; d) others. Additionally, both governmental institutions and tour operators answered the question “Do you consider poaching as an issue that affects wildlife watching tourism?” and tour operators were requested to indicate the “difficulties encountered during tours because of poaching activities”.

Out of the 46 governmental institutions that replied to the first question, 93% confirm that there are problems with poaching in their countries or in their protected areas. The majority of the governmental institutions state that terrestrial mammals are the most commonly poached (70%). Marine wildlife and birds are threatened to a much lesser extent (indicated by 25% and 30% of the participants respectively). Other species were mentioned by 5% of the governmental institutions that replied.

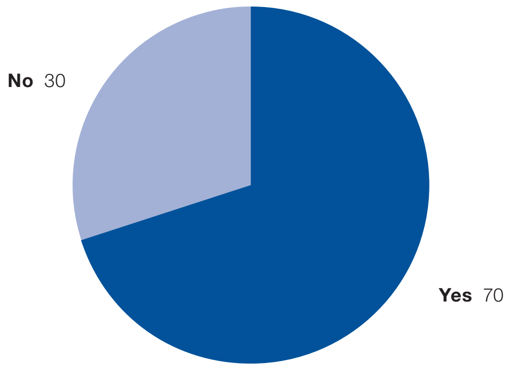
Additionally, out of the 46 governmental institutions and the 145 tour operators that replied to these questions, 80% of the governmental institutions and 70% of the tour operators state that it is affecting wildlife watching tourism. The following explanations were provided:

Figure 3.8 Does poaching affect wildlife watching tourism? (%)

Government institutions respond:



Tour operators respond:



Government institution respondents, n = 46

Tour operators respondents, n = 145

- Poaching decreases wildlife populations and adversely affects ecosystems;
- Poaching has a deteriorating effect on the tourism experience: reduced wildlife populations and changes in animal behaviour diminish the chance to observe wildlife. Animals become shyer and are harder to find and approach;
- Bad sightings occur (carcasses, rhinos without horns, marked animals, slaughtered and living animals on sale) that significantly affect the tourism experience;
- Poaching threatens security. Shootings in the parks, no-go areas, warning signs, encounters with poachers and armed anti-poaching patrols make tourists feel unsafe or are put in actual danger;
- It creates a bad image of a country or a destination and therefore fewer tourists visit the places affected by poaching;
- Anti-poaching measures are a big financial burden for the protected areas and countries in general; and
- Poaching results in lower numbers of tourists, reduces tourism receipts and affects the long-term sustainability of tourism.

While a majority of the tour operators state that tourism is affected by poaching, only 26% of the participants report direct impacts on their operations, e.g., additional costs for extra security measures, the necessity to change itineraries because of blocked roads or closed areas and a negative impact on the tourists' satisfaction as wildlife observation is less guaranteed and bad sightings as described above occur.

3.4.3 Tour operators can play an important role in raising awareness of the issue and (co-) funding anti-poaching initiatives

Governmental institutions and tour operators were requested to indicate whether they "are involved or fund anti-poaching activities" and/or "distribute specific information on poaching". Additionally, tour operators were asked whether their "customers are concerned with poaching".

A total of 47 governmental institutions provided responses with 77% indicating that they are involved with anti-poaching measures. For instance: patrolling and law enforcement (prosecution), awareness raising campaigns, environmental education and working with communities are important anti-poaching measures. Other actions are gaining the support of other authorities, participating in policy making at regional and international levels and the gathering intelligence and research on poaching. Many participants indicate a variety of measures or state that there is a broad anti-poaching strategy in place.

The 26% of governmental institutions that replied that are not engaging in such measures are in most cases tourism ministries or national tourism authorities that are not responsible for wildlife conservation. Otherwise, all but one protected area/wildlife conservation authority state that they engage in anti-poaching activities.

Of the 145 tour operators that replied, 49% state that they fund anti-poaching initiatives; 51% do not engage in such measures; 34% of the tour operators know that their suppliers are involved in anti-poaching support; 58% are not aware of such initiatives and 8% indicate that their suppliers do not fund anti-poaching.

A total of 45 governmental institutions mentioned that 42% do not distribute information on poaching, however, 22% state that this is planned for the future. Looking at the different types of institutions, the answers are the same: a third of the tourism ministries and a third of the protected area/wildlife conservation authorities distribute information on poaching to visitors and/or the general public, more than half of them do not distribute such information or are only currently developing it.

Of the 145 tour operators that replied, the majority (58%) does not distribute information on poaching. 23% say they use a variety of media and measures to inform their clients (websites, flyers, travel information, newsletters, press releases, give-aways, brochures etc.). In many cases, the tour guides inform the tourists about the topic. Sometimes tourists visit an education center that informs them about poaching. Some tour operators distribute information materials developed by nature conservation NGOs. About 40 NGOs, institutions and anti-poaching projects and other organizations are mentioned in the responses to the survey.

32% of 145 participants state that their customers actively ask about poaching, another 51% say that the customers express their concern when the topic comes up – depending on the tour operator, this was found to happen very often (70%) or occasionally (30%). Only 16% report not experiencing concerns of the tourists regarding the topic.

The extensive comments of the participating tour operators reveal their deep concern with the topic of poaching (see box below).

Tour operators' comments (selection)

"Africa without wildlife would deprive all TO the basis of their existence. Semi-captive settings are no solution, wildlife needs to be at free range in big game parks."

(Germany, translated from German)

"Wildlife conservation should play a bigger role for the tourism sector and the revenue it generates. (…)"

(Germany, translated from German)

"(…) It is terrible that human beings with intelligence can be so barbaric at this day and age. (…) PLEASE DO something to save the rhinos and elephants."

(South Africa)

"We are willing to support anti-poaching activities but only if the government gets serious with the whole issue. Without government intervention, it will be a fruitless effort (…)."

(Tanzania)

"The increased media coverage about poaching has been a matter for our clients. In many cases, they have seen evidence of poaching (…) with skittish animals, carcasses or areas devoid of game."

(Tanzania)

"Great concern with the elevated rhino and elephant poaching activity occurring in Africa, this will ultimately impact the wildlife viewing opportunities as well as devastate the tourism industry."

(United States of America)

4.
Conclusions and recommendations

The review of the literature and case studies reveal that while there are numerous studies, projects and publications analyzing wildlife watching tourism, more is needed in terms of measuring its value. Although the economic value of wildlife watching tourism is usually referred to as important, the reviewed literature focuses mainly on how the economic value could be evaluated and points out that there are no valid data readily available for such analysis. Additionally, an estimation of the overall value of the segment based only on the available case studies of specific destinations are not broadly representative and can be misleading given the different levels of tourism development in Africa. However, although there are ongoing efforts being carried out to monitor data that could be relevant for estimating the economic value of the wildlife watching tourism sector, such as monitoring the number of arrivals and receipts of protected areas, these efforts are often inconsistent and commonly lead to inconclusive analysis.

The main findings of this briefing paper are based on the primary data gathered through the surveys carried out among national tourism authorities, protected area and wildlife conservation authorities, individual protected areas and international and African tour operators. In a majority of cases, the replies of governmental institutions are aligned with the replies of tour operators and in the cases where alignment did not happen, an interesting debate on the links between governmental perception and market presence of destinations was triggered. The representative response to the survey and the correlation of replies from public and private sectors supports most of the findings well.

The results of the survey reflect the serious concern of both governmental institutions and tour operators related to the poaching crisis and its negative impact on tourism. It is clear this criminal activity is viewed as a threat to the long-term sustainability of tourism and potentially jeopardizes the development opportunities linked to the sector. Moreover, the feedback from the participating governmental institutions and tour operators confirm that wildlife watching is a very important segment of tourism for most African countries as well as a profitable one, with potential to benefit the local community. In fact, local communities appear to be involved in wildlife watching tourism in most of African countries, mainly through employment in accommodation, restaurants and guiding. Communities also function as suppliers of goods and services, primarily food and beverages and receive sometimes indirect tourism benefits through redistribution of revenues from protected area entrance fees and funds allocated to community development projects. Additionally, the annual revenues of wildlife watching tours represent 80% of the total annual revenues of trips to Africa for the participating tour operators. The replies provided indicate that revenues are expected to grow further. On average, the annual turnover of a micro tour operator is US$ 1 million; US$ 3.5 million for a small tour operator, US$ 5 million for a medium tour operator; and US$ 17.5 million for a large tour operator.

According to the survey, wildlife watching tourism takes place mainly in protected areas and nature, national parks and wildlife are among the most important assets for wildlife watching destinations. Safari appears to be the main kind of wildlife watching. Safari tours are being operated by 96% of the participating tour operators and the sub-regions that are most frequented for safari tours are East and Southern Africa, where countries which are already known as wildlife watching destinations are located. From both sub-regions also higher numbers of governmental replies were received; an indication that here enabling frameworks for the development of wildlife watching tourism are already in place. It is to be noted that a great number of governmental replies were also received from the Central and West African sub-regions, which indicates the existing will to further develop wildlife watching tourism in these destinations. However, the number of tour operators active in Central and West Africa is still small.

Bird watching appears to be the second most practiced type of wildlife watching which can be observed in almost every African country and is being offered by 80% of the tour operators. The operation of bird watching tours mainly takes place in top safari destinations and indicates that bird watching could be offered more frequently in combination with other activities than as a specialized product. In fact, the results of the survey point out that wildlife watching tourism is normally combined with nature-related activities, cultural heritage and resort/beach holidays. In the third place and with variations depending of the region come marine wildlife tours and the observation of Great Apes, followed by special tracking of wildlife, which are especially important for countries that are not classic safari destinations but do play a role as wildlife watching destinations.

Through analysis of the data, it was possible to identify key characteristics and economic indicators related to the segment of wildlife watching tourism in Africa. A typical wildlife watching tour involves a group of 6 persons, lasts 10 days and has an average daily price per person per day

of US$ 433 as well as involves out-of-pocket expenses of US$ 55 per person per day. These indicators were also analyzed per market segment (standard, luxury) and it was noted that neither the size of the group or average length of stay would register remarkable variations for the different segments. In this regard, the analysis seems to indicate that the average size of the group and length of stay are intrinsic characteristics to a wildlife watching product which do not necessarily relate to the level of comfort of the experience. The variation in the average price per person per day is on the other hand significant: US$ 753 for a luxury package and US$ 243 for a standard package. From the participating sample, 42% of the participating tour operators offer standard wildlife watching tours, 28% are specialized in luxury tours and 30% target both standard and luxury clients.

Data on protected area visitors and receipts from 14 countries was used were conclusive data was provided, and indicates that wildlife watching tourism is generating a considerable amount of revenues for the countries where it is taking place. The protected area receipts of these 14 countries totaled US$ 142 million per year. As this figure relates to only a small number of countries, one can assume that protected area receipts are indeed much higher. Guidance and capacity building for a more consistent monitoring of protected area visitors and receipts as well as a framework for their analysis are needed. In this regard, the development of a model for the structured integration and evaluation of available data, in order to harness it for an overall assessment of the economic value of wildlife watching tourism in Africa, which would connect data from protected areas with tour operators' performance, would be useful.

A majority of the protected area authorities participating in the survey is involved in anti-poaching measures. Tourism authorities are involved only to a minor extent and the majority does not distribute information on poaching. From the side of the participating tour operators, about half of them fund anti-poaching initiatives or engage in a nature conservation project. Only a few inform their customers on the issue. Although the involvement in anti-poaching initiatives is not very extensive yet, the survey shows that there is potential for mobilizing the tourism sector in anti-poaching campaigns since they can play a key role in awareness raising and potentially (co-) finance anti-poaching initiatives.

Finally, this briefing paper is to be seen as a first step towards measuring the economic value of wildlife watching tourism in Africa and defining the role of the tourism sector in the fight against poaching. The exercise has succeeded in identifying key economic indicators and characteristics of wildlife watching tourism in African countries. Despite the limitations, the findings support the potential of the tourism sector to advance its contribution to the fight against poaching in Africa and confirm the importance of wildlife watching tourism for the sustainable development of the region.

Annex I

List of contributions and tour operators

List of contributions

The following organizations and institutions contributed to the briefing paper by providing case studies, other publications and expertise:

- Adventure Travel Trade Association (ATTA)
- African Travel and Tourism Association (ATTA)
- Association of British Travel Agents (ABTA)
- Convention of Migratory Species of Wild Animals (UNEP/CMS)
- Convention on International Trade in Endangered Species of Wild Fauna (CITES)
- Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ)
- Federal Agency for Nature Conservation of Germany (BfN)
- International Consortium on Combating Wildlife Crime (ICCWC)
- International Fund for Animal Welfare (IFAW)
- International Institute for Sustainable Development (IISD)
- International Union for Conservation of Nature (IUCN)
- United Nations Office on Drugs and Crime (UNODC)
- World Wildlife Fund (WWF)

List of tour operator associations

The following tour operators associations provided support to circulate the survey invitation:

- ABTA, UK
- Tour Operators' Initiative for Sustainable Tourism Development (TOI)
- Deutscher ReiseVerband e.V. (DRV), Germany
- Association of French Tour Operators (SETO/CETO)
- Netherlands Association of Travel Agents and Tour Operators (ANVR)
- The African Travel & Tourism Association (ATTA), UK
- Adventure Travel Trade Association (ATTA), USA
- American Society of Travel Agents (ASTA)
- Association of Danish Travel Agents and Tour Operators (Danmarks Rejsebureau Forening)
- Tanzania Association of Tour Operators
- Africa Travel Association, USA
- forum anders reisen e.V., Germany
- Association of Independent Tour Operators (AITO), UK
- Schweizerrischer Reise-Verband (SRV), Switzerland
- Association for the Promotion of Tourism in Africa (APTA), USA
- Association of Croatian Travel Agencies
- ASTOI Confindustria Viaggi (Associazione Tour Operator Italiani)

List of participating tour operator

AFRICA		
1	**Botswana**	Gavin Blair Safaris
		Golden Okavango t/a Golden Africa
2	**Cabo Verde**	Naturalia Capa Verde Lda
3	**Ethiopia**	Abeba Tours Ethiopia
4	**Gabon**	ngondetour
5	**Kenya**	African Quest Safaris Ltd
		Asilia Safaris
		Eco Adventures Africa
		Impact Adventure Travel
		Kent Tours & Travel Ltd
		Outdoor Africa
		Simba Holidays
		Arp Travel Group
6	**Madagascar**	Asisten Travel
		Le Voyageur
		SETAM
7	**Malawi**	Rpss
		Ulendo Safaris
8	**Namibia**	ATC Namibia
		Chameleon Holidays
		Chameleon Safaris Namibia
		E. Safaris & Tours
		Eagles Rock Tours & Safaris
		Karibu Safari Namibia
		Namib Enviro Tours cc
		Sense of Africa and Wild Africa Travel, Tourvest
		Ultimate Safaris
9	**Nigeria**	Johnpaul Ezeani
10	**Rwanda**	Amahoro Tours
11	**South Africa**	ATC-African Travel Concept (DMC)
		Africa Geographic Travel
		African Adventure Safaris
		Bushtracks Expeditions
		Kirfara
		Mozambique Tourism
		Roads to roam
	South Africa	Rockjumper Birding Tours
		Sun Safaris
		Sunway Safaris
		The Savannah Africa
		Wow Cape Town Tours
12	**Uganda**	Around Africa Safaris
		BIC Tours Ltd
		Kagera Safaris / Miriam Kyasiimire
		Kombi Nation Tours
		Mamaland safaris. Tony Byarugaba
		Matoke Tours
		Surf Tours & Travel
		The Far Horizons
13	**United Republic of Tanzania**	BMS Safaris Limited
		Blackmamba Travels Lts
		Chem Chem Safaris
		Duma Explorer
		Fast Travel & Adventure Limited
		Four Seasons Safari Lodge Serengeti
		Intoafrica Eco Travel Ltd
		Kibo Guides (TZ) Ltd
		Leopard Tours Ltd
		Manyara Ranch Conservancy
		Melau Tours and Safaris
		Nomad Tanzania Ltd
		Safari Makers Ltd
		Serengeti Balloon Safaris
		Summit Expeditions & Nomadic Experience
		The African Footprint Co. Ltd (B2B Safaris)
		The Map's Edge Ltd
		Wild Things Ltd
		Wildlife (East Africa) Ltd
		Karibu Africa Safaris Ltd
14	**Zimbabwe**	Natureways Safaris Pvt Ltd
		Nyati Travel
		Zambezi Safari & Travel Co.

EUROPE

15	**Croatia**	Olymptours by Ratko Flajpan
		El-pi Tours Malinska*
		Frodo d.o.o., Yacht Base travel agency*
		Hvar Touristik*
		Katarina Line*
		Lang International*
		PENTA d.o.o.*
		Zlatna Greda Ltd. tourist agency*
16	**Czech Republic**	Stella Travel
17	**Denmark**	Limpopo Travel
18	**Finland**	Koonono Tours Ltd
19	**France**	Kuoni
		Les Circuits Découverte by Club Med
		Rev Vacances
		Vacance Transat (Transat France)
		Voyageurs du Monde
20	**Germany**	AST African Special Tours GmbH
		Afrika à la Carte Reisen
		Albatros-Tours
		Art of Travel GmbH
		Bikeworld Travel GmbH
		Chamäleon Reisen GmbH
		DER Touristik
		Daktaritravel
		Djoser Reisen GmbH
		ETC Reisen Edutainment Travel Company
		Elangeni African Adventures
		Escape tours GmbH
		Globetrotter Select
		Jacana Tours
		Karibu Safaris GmbH
		Klipspringer-Tours GmbH
		Makalali - African Exclusive Tours
		S.A.Landprogramm
		SA Travel
		Severin Travel Africa
		Studiosus Reisen
	Germany	Tour Vital
		Thomas Cook AG Segment Continental Europe
		Wikinger Reisen
		R.U.F Touristik GmbH*
		Rucksack Reisen*
		Tour Exquisit*
21	**Italy**	FollowMe
		Best Tours Italia
		Hoteplan Italia Spa
		Il Diamante
		NAAR Tour Operator
		Settemari Spa
		Viaggi Dell'elefante
		Viaggi del Mappamondo
22	**Lithuania**	Baltic tour*
23	**Netherlands**	Bongo Asili Travel
		Kuoni Netherlands/NDTC
		Live To Travel
		Mondi Reizen
		SNP Natuurreizen (SNP Nature Travel)
		Travel Trend
		Travelhome
		Vamonos Travels
		De Jong Intra Vakanties
24	**Portugal**	Zoom Travel - Tailor Made Tour Operator
25	**Spain**	A Step Ahead S.L.
26	**Switzerland**	Stohler Tours
		Africa Design Travel
27	**United Kingdom**	Baobab Travel
		Jacada Travel Ltd
		Marketing Worldwide
		Natural High Safaris
		Rainbow Tours
		Thomas Cook
		TripAfrica
		Wildlife Trails

AMERICA		
28	**Canada**	Goway Travel
29	**Peru**	Andean Lodges*
30	**United States of America**	David Mark Erickson Travel
		Africa Adventure Consultants
		AfricanMecca Inc
		Infinite Safari Adventures
		Journeys International
		Timeless Africa
		Travcoa

ASIA		
31	**Bangladesh**	Discovery Tours And Logistics
32	**India**	Greener Pastures*
		Navigator India*
33	**Republic of Korea**	Sihnae Lee

AUSTRALIA		
34	**Australia**	The Classic Safari Company

* **Participating tour operators that were not offering trips to Africa at the time of the survey.**

Note: The above list of participating tour operators has been configured as per the entries to the survey.

Annex II
Available data

Available data on international tourism arrivals and receipts for African countries

		INTERNATIONAL TOURIST ARRIVALS (1,000)				INTERNATIONAL TOURIST RECEIPTS (US$ million)			
		2010	2011	2012	2013	2010	2011	2012	2013
1	Algeria	2,070	2,395	2,634	2,733	219	209	217	350
2	Angola	425	481	528	650	719	646	706	1,234
3	Benin	199	209	220	231	149	188	170	..
4	Botswana	2,145	..	..	..	78	33	34	45
5	Burkina Faso	274	238	..	218	72	133	84	..
6	Burundi	142	..	..	..	2	2	1	2
7	Cameroon	573	604	817	912	159	409	349	576
8	Cabo Verde	336	428	482	503	278	368	414	462
9	Central African Republic	54	..	..	..	11	..	11.	..
10	Chad	71	77	86	100	..	..	..	..
11	Congo	194	218	256	297	..	..	..	..
12	Côte d'Ivoire	252	270	289	..	201	141	..	..
13	Democratic Republic of the Congo	81	186	..	191	11	11	7	1
14	Djibouti	..	..	..	63	18	19	21	22
15	Equatorial Guinea	..	..	..	..	..	..	..	..
16	Eritrea	84	107	..	..	..	..	..	..
17	Ethiopia	468	523	596	681	522	770	607	621
18	Gabon	..	..	..	..	..	..	..	..
19	Gambia	91	106	157	171	74	83	88	..

		INTERNATIONAL TOURIST ARRIVALS (1,000)				INTERNATIONAL TOURIST RECEIPTS (US$ million)			
		2010	2011	2012	2013	2010	2011	2012	2013
20	Ghana	931	..	..	..	620	694	914	853
21	Guinea	..	..	..	56	2	2	1	..
22	Guinea-Bissau	..	..	..		13	9	7	..
23	Kenya	1,470	1,785	1,781	1,433	800	926	935	881
24	Lesotho	414	397	422	320	25	29	46	39
25	Liberia	..	..	..	..	12	232	..	..
26	Madagascar	196	225	256	196	321	..	..	..
27	Malawi	746	767	..	..	33	34	34	..
28	Mali	169	160	134	142	205	267	142	..
29	Mauritania	..	..	..	..	..	..	48	41
30	Mauritius	935	965	965	993	1,282	1,484	1,477	1,321
31	Morocco	9,288	9,342	9,375	10,046	6,703	7,281	6,703	6,854
32	Mozambique	1,718	1,902	2,113	1,886	197	231	250	241
33	Namibia	984	1,027	..	1,176	438	518	485	409
34	Niger	74	82	..	123	105	96	50	..
35	Nigeria	1,555	715	..	600	576	628	559	543
36	Rwanda	504	688	815	864	202	252	282	294
37	Sao Tome and Principe	8	12	..	..	11	16	13	13
38	Senegal	900	1,001	..	1,063	453	484	407	..
39	Seychelles	175	194	208	230	274	291	310	344
40	Sierra Leone	39	52	60	81	26	44	42	59
41	South Africa	8,074	8,339	9,188	9,537	9,070	9,515	9,994	9,238
42	Sudan	495	536	..	591	94	185	772	773
43	Swaziland	1,078	879	1,093	968	50	21	30	13
44	Togo	202	300	235	327	66	79	95	..
45	Tunisia	6,903	4,785	5,950	6,269	2,645	1,914	2,227	2,190
46	Uganda	946	1,151	1,197	1,206	784	959	1,135	1,184
47	United Republic of Tanzania	754	843	1,043	1,063	1,255	1353	1,713	1,880
48	Zambia	815	920	859	915	125	146	155	224
49	Zimbabwe	2,239	2,423	1,794	1,833	634	664	749	851

Annex III
Governmental institutions

List of participating governmental institutions

	COUNTRY	NAME	INSTITUTION TYPE
1	**Benin**	Direction du Parc National de la Pendjari	National Park
2	**Botswana**	Ministry of Tourism, Environment & Wildlife	Tourism Ministry
3	**Burkina Faso**	Ministère de la Culture et du Tourisme	Tourism Ministry
4	**Burundi**	Ministère du Commerce, de l'Industrie, des Postes et du Tourisme	Tourism Ministry
5	**Cameroon**	Ministry of Tourism and leisure	Tourism Ministry
6	**Cabo Verde**	General Directorate of Environment	National Wildlife Conservation Authority
7	**Chad**	Ministère de l'Environnement et des Ressources Halieutiques	Environment Ministry
8	**Congo**	Wildlife Conservation Society (WCS) Programme Congo	National Wildlife Conservation Authority
9	**Cote d'Ivoire**	Ministère du Tourisme	Tourism Ministry
10	**Democratic Republic Congo**	Administration Nationale du Tourisme	National Tourism Authority
		Institut Congolais pour la Conservation de la nature (ICCN)	National Wildlife Conservation Authority
11	**Eritrea**	Ministry of Agriculture	Agriculture Ministry
12	**Ethiopia**	Ethiopian Wildlife Conservation Authority (EWCA)	National Wildlife Conservation Authority
13	**Gabon**	Ministère des Mines, de l'Industrie et du Tourisme	Tourism Ministry
14	**Gambia**	Gambia Tourism Board	National Tourism Authority
15	**Ghana**	Bui National Park	National Park
		Wildlife Division of Forestry Commission	National Wildlife Conservation Authority
		Forestry Commission Wildlife Division	National Wildlife Conservation Authority
		Ministry of Tourism, Culture & Creative Arts	Tourism Ministry
16	Guinea	Office guinéen des Parcs et Réserves	National Wildlife Conservation Authority

	COUNTRY	NAME	INSTITUTION TYPE
17	**Kenya**	Kenya Wildlife Service	National Wildlife Conservation Authority
		Ministry of East African Affairs, Commerce and Tourism	Tourism Ministry
		County Government of Migori	Others (County Government)
18	**Lesotho**	Sehlabathebe National Park	National Park
		Ministry of Tourism, Environment and Culture	Tourism Ministry
19	**Malawi**	Department of National Parks and Wildlife	National Wildlife Conservation Authority
20	**Mali**	Office Malien du Tourisme et de l'Hôtellerie (OMATHO)	National Tourism Authority
21	**Mauritania**	Parc National du Diawling	National Park
		Direction des Aires Protégées et du Littoral	National Wildlife Conservation Authority
22	**Mozambique**	Ministry of Tourism	Tourism Ministry
23	**Niger**	Ministère du Tourisme et de l'artisanat	Tourism Ministry
24	**Senegal**	Direction des Parcs Nationaux: Parc National des Iles de la Madeleine	National Park
		Ministère du Tourisme et des Transports Aériens	Tourism Ministry
25	**Seychelles**	Seychelles Islands Foundation	Local Wildlife Conservation Authority
26	**Sierra Leone**	National Tourist Board of Sierra Leone	National Tourism Authority
27	**South Africa**	CapeNature	Local Wildlife Conservation Authority
		Western Cape Nature Conservation Board trading as CapeNature	Local Wildlife Conservation Authority
		South African National Parks	National Wildlife Conservation Authority
		National Department of Tourism	National Tourism Authority
28	**Swaziland**	Big Game Parks	National Wildlife Conservation Authority
		Swaziland National Trust Commission	National Wildlife Conservation Authority
		Swaziland Tourism Authority	National Tourism Authority
29	**Uganda**	Uganda Wildlife Authority	National Wildlife Conservation Authority
		Ministry of Tourism Wildlife and Antiquities	Tourism Ministry
30	**United Republic of Tanzania**	Tanzania National Parks	National Wildlife Conservation Authority
		Wildlife Division	National Wildlife Conservation Authority
		Tanzania Association of Tour Operators (TATO)	Others (Tour Operator Association)
31	**Zimbabwe**	Zimbabwe Tourism Authority	National Tourism Authority

Note: The above list of participating tour operators has been configured as per the entries to the survey.

References

Report, (online), available at:
http://siteresources.worldbank.org/INTAFRSUMAFTPS/Resources/2049902-1327506860777/FinalSSATourismRpt1118.pdf (25-03-2014).

Africa Region's Finance and Private Sector Development Department (AFTFP) (2010), *Sub Saharan Africa Tourism Industry Research. Phase II Tour Operators Sector: Results and Analysis,* Final Report, (online), available at:
http://siteresources.worldbank.org/INTAFRSUMAFTPS/Resources/TourOperatorRptFINAL96.pdf (18-03-2014).

Biggs, D. et al. (2011), 'The Value of Avitourism for Conservation and Job Creation - An Analysis from South Africa', in: *Conservation and Society,* 9 (1), pp. 80-90.

Blanc, J. J. et al. (2007), *African Elephant Status Report 2007: an update from the African Elephant Database,* Occasional Paper Series of the IUCN Species Survival Commission, No. 33, (online), available at:
www.african-elephant.org/aed/pdfs/aesr2007.pdf (03-04-2014).

Centre for the Promotion of Imports from developing countries (CBI) / Minister of Foreign Affairs (2014), *Promising EU export markets for wildlife tourism,* (online), available at:
www.cbi.nl/system/files/marketintel/Promising_EU_export_markets_for_wildlife_tourism.pdf (25-03-2014).

Christie, I. et al. (2013), *Tourism in Africa. Harnessing Tourism for Growth and Improved Livelihoods,* (online), available at:
http://documents.worldbank.org/curated/en/2013/01/18320011/tourism-africa-harnessing-tourism-growth-improved-livelihoods (04-04-2014).

CITES (2013), *New figures reveal poaching for the illegal ivory trade could wipe out a fifth of Africa's Elephants over next decade,* (online), available at:
http://www.cites.org/eng/news/pr/2013/20131202_elephant-figures.php (04-04-2014).

Ebbe, K. (2010), *Tourism Portfolio Review. January 2005 – December 2009 Volume I. Findings, Lessons Learned, Recommendations,* (online), available at:
http://siteresources.worldbank.org/INTAFRSUMAFTPS/Resources/2049902-1327506860777/PortfolioReviewFinalVolumeI.pdf (23-04-2014).

Emslie, R. (2012a), 'Ceratotherium simum', in: IUCN (2013), *IUCN Red List of Threatened Species,* Version 2013.2., (online), available at: www.iucnredlist.org (30-03-2014).

Emslie, R. (2012b), 'Diceros bicornis', in: IUCN (2013), *IUCN Red List of Threatened Species,* Version 2013.2., (online), available at: www.iucnredlist.org (30-03-2014).

Freyer, W. (2011), *Tourismus. Einführung in die Fremdenverkehrsökonomie,* 10. Auflage, Oldenbourg Verlag, München.

Hamilton, K. and Pavy, J.M. (2010), 'Unlocking the potential of tourism in Zambia', in: *Private Sector Development,* 7th issue.

Higginbottom K. (ed.) (2004), *Wildlife tourism: impacts, management and planning,* Altona, Vic. Common Ground Publishing, Gold Coast.

Hinterholzer, T. and Jooss, M. (2013), *Social Media Marketing und-Management im Tourismus,* Springer Gabler.

International Consortium on Combating Wildlife Crime (2011), *Information Note,* (online), available at:
www.cites.org/eng/prog/iccwc.php (25-03-2014), ICCWC.

International Institute for Sustainable Development (IISD) (2013), 'A Summary Report of the First International Environmental Compliance and Enforcement Conference' in: *INTERPOL-UNEP Bulletin,* vol. 216, no. 1, (online), available at:
www.unep.org/environmentalgovernance/Portals/8/documents/UNEP-INTERPOLConferenceReport.pdf (16-01-2014).

International Union for Conservation of Nature (2012), *Elephant Database,* (online), available at: www.elephantdatabase.org/preview_report/2013_africa/Loxodonta_africana/2012/Africa (07-04-2014), IUCN.

Job, H. and Paesler, F. (2013), 'Links between nature-based tourism, protected areas, poverty alleviation and crises - The example of Wasini Island (Kenya)', in: *Journal of Outdoor Recreation and Tourism,* vols. 1-2 (2013), pp. 18-28.

Lengefeld, K. (2013), *Touristic Economic Value and Threats for Emblematic Species such as Koalas, Pandas and Rhinos,* Power Point Presentation.

Milliken, T. and Shaw, J. (2012), *The South Africa – Viet Nam Rhino Horn Trade Nexus: A deadly combination of institutional lapses, corrupt wildlife industry professionals and Asian crime syndicates,* (online), available at: www.traffic.org/species-reports/traffic_species_mammals66.pdf (16-01-2014).

Nowell, K. (2012), *Wildlife Crime Score Card - Assessing compliance with and enforcement of CITES commitments for tigers, rhinos and elephants. A WWF Report,* (online), available at: www.wwf.de/fileadmin/fm-wwf/Publikationen-PDF/WWF_Wildlife_Crime_Scorecard_Report.pdf (16-01-2014).

Republic of Botswana/IUCN (2013), *African Elephant Summit Gaborone, Botswana 2-4 December 2013: Urgent Measures* (3 December 2013), (online), available at: https://cmsdata.iucn.org/downloads/african_elephant_summit_final_urgent_measures_3_dec_2013.pdf (16-01-2014).

Ripple, W. J. et al. (2014), 'Status and Ecological Effects of the World's Largest Carnivores', in: *Science,* vol. 343, no. 6167.

Rogers, J. and Gibbs, R. A. (2014), *Geographical distribution and genetic variation in selected primates; Comparative primate genomics: emerging patterns of genome content and dynamics.* Nature Reviews Genetics, 15th edition, pp. 347–359.

Smith, S. L. J. (1998), 'Tourism as an industry: debates and concepts', in: Ioannidis, D. and Debbage, K.G. (eds.) (1998), *The Economic Geography of the Tourist Industry.* Routledge, Abingdon, pp. 31-52.

Steck, B. (SNV) and ODI (2009), *Tracing the Tourism $,€, £ in Northern Tanzania. Power point presentation,* British Overseas Development Institute and Netherlands Development Organisation.

Sustainable Tourism Cooperative Research Centre (STCRC) (2009), *Wildlife tourism: challenges, opportunities and managing the future,* (online), available at: www.crctourism.com.au/bookshop/BookDetail.aspx?d=668 (18-04-2014).

U.S. Fish & Wildlife Service (2012), *2011 National Survey of fishing, hunting and wildlife-associated recreation,* (online), available at: www.census.gov/prod/2012pubs/fhw11-nat.pdf (02-05-2014).

Troëng, S. and Drews C. (2004), *Money Talks: Economic Aspects of Marine Turtle Use and Conservation,* WWF-International, Gland, Switzerland.

United Nations Development Programme (2011), *Discussion paper tourism and poverty reduction strategies in the integrated framework for least developed countries,* UNDP, Geneva.

United Nations Environment Programme (UNEP)/CITES/IUCN/TRAFFIC (2013), *Elephants on the dust - The African Elephant Crisis. A Rapid Response Assessment,* (online), available at: www.grida.no/_cms/OpenFile.aspx?s=1&id=1570 (16-01-2014).

United Nations Environment Programme/CMS (2006), *Wildlife Watching and tourism. A study on the benefits and risks of a fast growing tourism activity and its impacts on species,* UNEP/CMS Secretariat, Bonn.

United Nations Office on Drugs and Crime (2013a), *Transnational Organized Crime in Eastern Africa,* (online), available at: www.unodc.org/documents/data-and-analysis/Studies/TOC_East_Africa_2013.pdf (02-05-2014), UNODC.

United Nations Office on Drugs and Crime (2013b), *Transnational Organized Crime in East Asia and the Pacific,* (online), available at: www.unodc.org/documents/data-and-analysis/Studies/TOCTA_EAP_web.pdf (02-05-2014), UNODC.

United Nations Office on Drugs and Crime (2014a), *Environmental Crime - The Trafficking of Wildlife and Timber,* (online), available at: www.unodc.org/documents/toc/factsheets/TOC12_fs_environment_EN_HIRES.pdf (02-05-2014), UNODC.

United Nations Office on Drugs and Crime (2014b), *Wildlife Crime - Key Stats,* Unpublished document, UNODC.

World Tourism Organization (2002a), *Tourism and Poverty Alleviation,* UNWTO, Madrid.

World Tourism Organization (2002b), *Tourism: A Catalyst for Sustainable Development in Africa,* UNWTO, Madrid.

World Tourism Organization (2010a), *Tourism Satellite Account. Recommended Methodological Framework 2008,* UNWTO, Madrid.

World Tourism Organization (2011), *Exploring the Full Impact of Tourism for Policy Making. Extending the Use of Tourism Satellite Account through Macroeconomic Analysis Tools,* UNWTO, Madrid.

World Tourism Organization (2013), *Tourism Highlights 2013 Edition,* UNWTO, Madrid.

World Tourism Organization (2014a), *World Tourism Barometer,* vol. 12, UNWTO, Madrid.

World Tourism Organization (2014b), *Tourism Towards 2030. Global Overview,* UNWTO, Madrid.

World Tourism Organization (2014c), *Compendium of Tourism Statistics. Data 2008 – 2012,* UNWTO, Madrid.

World Travel & Tourism Council (2012), *Travel and Tourism Economic Impact: Sub-Saharan Africa, 2012,* (online), available at: www.wttc.org/site_media/uploads/downloads/sub_saharan_africa2012.pdf (18-03-2014), WTTC.

World Wildlife Fund (2013), *WWF Positionspapier CITES - Wichtige Anträge im Überblick.* 16. Vertragsstaatenkonferenz (Conference of the Parties, CoP) zum Washingtoner Artenschutzübereinkommen CITES von 3. bis 14. März 2013 in Bangkok, Thailand, (online), available at: www.wwf.de/fileadmin/fm-wwf/Publikationen-PDF/WWF_Positionspapier_D_2013.pdf (03-04-2014), WWF.

World Wildlife Fund/Dalberg (2012), *Fighting illicit wildlife trafficking: A consultation with governments,* (online), available at: www.wwf.de/fileadmin/fm-wwf/Publikationen-PDF/WWFFightingIllicitWildlifeTrafficking_LR.pdf (16-01-2014), WWF.

UNWTO

World Tourism Organization

Capitán Haya 42, 28020 Madrid, Spain
Tel: (34) 91 567 81 00 / Fax: (34) 91 571 37 33
omt@UNWTO.org / www.UNWTO.org