CBI Product Factsheet:
Safari Tourism from Germany, Scandinavia and the UK to Zambia

‘Practical market insights into your product’

The UK, Germany and the four Scandinavian countries of Denmark, Finland, Norway and Sweden are all strong source markets for safari tourism. Germans are the world’s biggest spenders of outbound tourism and the largest outbound market from the EU (European Union) while Scandinavians are motivated by holidays with a strong outdoor element. Safari-goers are typically highly educated and are generally demanding of sustainable tourism, such as animal protection and habitat conservation. Today, Africa is more accessible than it has ever been previously and the popularity of safari holidays is growing. While popular destinations must adapt to increasing tourist arrivals, less well-known destinations such as Zambia, have the opportunity to benefit from this emerging demand.

Product Definition

Safari tourism is characterized by trips or holidays to view wildlife in its natural habitat and in this case, by trips to Zambia in Southern Africa. It is largely a viewing holiday with limited hands-on activity although such activities may be offered at certain places such as feeding or touching the animals, and children’s hands-on activities at family-orientated destinations.

This report focuses solely on African safaris where the drive to see the classic ‘big five’ of lion, elephant, rhino, buffalo and leopard in their natural habitat continues to have huge appeal around the world and among source markets of Germany, Scandinavia and the UK. In addition, it covers the different types of safari including canoeing safaris, elephant trails, horseback safaris, photographic safaris and walking safaris, including those with animals such as lion and cheetah.
Traveller profile

For the western visitor, an African safari is often regarded as a ‘once in a lifetime adventure’ or even a ‘life’s dream’. The profile of safari-goers is extremely broad and they are possibly one of the most diverse groups of niche tourists. Broadly, they can be categorised into three distinct segments which are neither exclusive nor unique:

- **Wildlife tourists**: who range from the generalist travelling to Africa to view animals in their natural habitat, to those with a more specialist interest in wildlife such as bird watching. Across the spectrum, consumers vary in age, gender and socio-economic grouping, and range from budget travellers and those who opt for luxury accommodation and travel means. Specialist wildlife tourists are more likely to travel independently while older consumers may be more demanding of facilities and infrastructure. In return however, they typically generate the most income.

- **Eco-tourists**: a sub-segment of the nature tourism niche, eco-tourism is increasing in popularity and shares similar values with nature tourism. Sustainable tourism and wildlife conservation and preservation programmes are of key importance to this group, and ecotourism destinations including national parks and other protected areas and reserves have reported increased demand. Broadly, eco-tourists are:
  - 35+ years old
  - evenly split between female and male
  - highly educated, 82% college graduates

Wilderness setting, wildlife viewing and hiking/trekking are important trip aspects.

- **Adventure tourists**: safaris are a distinct activity within the adventure tourism market, within the category of ‘soft adventure’, characterised by interaction with nature, culture and low-risk physical activity. Typically, the soft adventure tourist will take part in additional activities while on safari, such as trekking, horseback riding and white-water rafting. The profile of the adventure tourist is similar to the eco-tourist:
  - 35+ years old
  - evenly split between female and male
  - environmentally and culturally aware.

- **German Market**: Germans are the world’s biggest global spenders of outbound tourism and are adept at searching for value-for-money packages and all-inclusive holidays. Nature and the outdoors are identified as the primary reasons for travel.

Consideration for Action

- When targeting wildlife tourists, make sure there is a broad range of information about the wildlife to appeal to tourists across the spectrum from general enthusiasts (game drives) to those with more specialist interests (birdwatchers and wildlife photographers).

- Detailed knowledge of the environment and species that live there are of key importance to this group. Using major wildlife and nature magazines (print and online) will help cement your product.

- Ensure that factors relating to ‘unspoiled nature’ and ‘natural habitats’ are highlighted, along with any eco-tourism certifications and accreditations that suppliers and operators have.

- Any specialist focus on conservation and preservation programmes concerning wildlife, habitats and ecosystems will be of interest to this group, as well as interactions with local communities.

- Adventure tourists are more likely than general wildlife tourists to participate in other activities while on safari. If you want to attract adventure tourists, offer additional activities to game drives, such as walking or riding safaris or, depending on your local environment, white water rafting, rappelling, fishing etc.

- Targeting the German consumer through online travel communities is a good way of accessing the wildlife tourist, particularly the younger age groups. Reviewing the content of these online communities provides a good insight into the...
abroad, and exploring new experiences is high on the agenda for German travellers. There is a trend towards more long-haul holidays, and recognised as a highly lucrative market amongst the key young adult, singles and couples market. South Africa is the leading African destination for the German market. The German wildlife tourist is recognised to be well-educated and aged between 26 and 60, and tend to be well travelled. The market is comprised of both wildlife enthusiasts and specialists.

- **Scandinavian Market:** Scandinavians have a strong desire to travel abroad and are doing so with greater frequency, investing more time and effort into foreign holidays. In 2011, outbound travel growth for Sweden, Norway and Denmark was reported to be 8.3%, with the largest growth attributed to Sweden. Sweden is also home to the more adventurous and well-travelled tourist in the region. Scandinavian outbound tourists are typically independent, preferring to make their own travel arrangements and booking tours in country. Scandinavian wildlife tourists fall into two distinct age groups:
  - 20-45 year old wildlife and adventure tourists who, while interested in wildlife, are keen to take part in other activities on the same trip
  - 46+ with a strong passion for wildlife, high disposable incomes and a high proportion of independent travellers. However, a significant portion is also looking for a high level of comfort and is more likely to opt for a luxury package.

  Additionally, there are wildlife enthusiasts that are either general enthusiasts or those with more specific interests such as bird watching. This group is also more likely to travel in a group of like-minded people and belong to clubs such as birding or fishing clubs.

- **UK Market:** In the UK, the market is disparate and it is estimated that 7-10% of the UK population is interested in wildlife tourism. The age range is fairly evenly spread across all ages:
  - 11% are aged 25-34
  - 20% aged 35-44
  - 27% aged 45-54
  - 28% are older wildlife tourists aged 55+.

As in other European markets, UK wildlife tourists tend to be experienced travellers who are highly educated. Older tourists typically enjoy higher disposable incomes and look for a higher level of luxury on their wildlife watching trips, while the younger age groups are more independent. An additional market worthy of note is the preferences, motivations and habits of the German wildlife tourist.

- On your own website, highlight the proximity of Zambia to South African and differentiate your business by highlighting any distinctive safari activities you offer that are not readily available in South Africa.

- Target the safari product alongside nature, wildlife and adventure activities such as trekking as Scandinavians have a high interest in the outdoors.

- For the younger safari-goer, offer flexibility and additional activities.

- Consider which market your facilities are most suited to. If you offer high levels of comfort check how it compares in quality and cost to similar accommodation and facilities in neighbouring destinations.

- Research specialist wildlife clubs in your target market and contact them to see if they are interested in developing group tours.

- Conservation and animal welfare is a sensitive issue for British people. Ensuring products are sustainable and promoting relevant certification and accreditations will be of significant appeal to this group of consumers.

- Consider family groups and what their needs might be such as child-friendly and hands-on activities, shorter game drives, kids clubs.
UK gap year market (aged 18-25) which is especially attracted to the African continent to undertake a number of voluntary projects, often in conjunction with adventure activities including safaris.

Product specifications

- **Quality of the Safari Experience:** Safari-goers to sub-Saharan African destinations usually travel long distances to reach their chosen spot and safaris are known to be expensive holidays. The pristine nature of the African habitat and diversity of species that may be seen are of paramount importance to this discerning visitor. Destination ‘icons’ that may also be endangered such as gorillas in Rwanda or black rhino in east and southern African countries are a draw to safari-goers.

- **Preservation of the Natural Environment:** the wonders of Africa’s natural geographic features are also of considerable interest to the safari-goer. Experiences in the vast African landscape, trips to natural features including waterfalls and rivers, and travelling through the vast open landscape are included as important factors for a good safari holiday.

- **Identify Safari Segments:** safaris are evolving and there are additional tourism segments that naturally fit and which the operator can focus on developing in order to attract an additional or new source market.

- **Enhanced Offerings and Add-ons:** Successful operators across the region offer a wide range of options to appeal to the interests of the broadest possible customer base. While traditional safaris in 4x4 vehicles are the most common form of game drives, other safari types are popular as additional activities.

- **Flexible Offerings:** accommodating the diverse needs of different types of safari tourist requires flexibility such as package tours for small or larger groups, or tailor-making specific trips on an individual basis.

- **Sustainability:** sustainability is a key issue for most safari-goers. They need to be sure that the operator they use are responsible tourism providers who have the long-term sustainability at the core of the business. Such practices should cover preservation

Considerations for action

- **Identify key species that can be used for specific marketing activities**

- **Highlight the wildlife viewing opportunities you offer so your guests know what to expect. For example do you offer individual guides or are game drives in small groups?**

- **Identify key locations that can be used for specific marketing activities. Use high quality photos on your website showing the natural setting. Include videos and post them on YouTube.**

- **Consider developing facilities to attract alternative safari segments such as:**
  - Photographic safaris
  - Family safaris
  - Weddings and Honeymoons

- **Develop a range of additional activities to ensure appeal to the broadest range of visitor including:**
  - Walking safaris
  - Canoeing safaris
  - Safaris by horseback
  - Balloon safaris
  - Photographic safaris
  - Walking with animals (e.g. lions, elephants, cheetahs) and animal trails
  - Other adventure activities (white-water rafting, abseiling, bungee jumping, kayaking, river boarding)

- **Ensure marketing materials clearly state any flexibility for group travel, including families, or options for tailor-made tours.**

- **Include any relevant accreditations on your website, marketing or guest briefing materials. Also include any of your activities that involve partnerships with local communities.**
and conservation of the animals and their habitats, and the local communities who are affected by tourism.

- **Comfort:** the diverse nature of safari-goers means that many different comfort levels are needed to accommodate needs which vary from a basic level such as simple tented or hut accommodation to luxury outfits in private resorts and lodges. However, value for money remains a key consideration for all groups, and older age groups across all markets are increasingly looking for a higher level of comfort.

- **Product Offer:** most travellers from European source markets will have their travel and activity plans in place before arriving on the African continent. However, independent tourists will be open to excursions which are available locally, particularly additional adventure activities.

### Legal requirements

- **No legal requirements:** There are no legal requirements for long haul tourism as it is offered outside the EU market. However, there are some EU travel and consumer laws that are applicable to tourism within the EU, for example the Package Travel Directive that protects consumers who contract package travel within the EU.

### Considerations for action

- Study the Package Travel Directive. Although it is not applicable to long haul tourism, it can help you to better understand the EU tourism market. In 2013, the EC released a draft revision of the 1990 EU PTD with the aim of addressing the lack of protection offered to consumers booking non-traditional dynamic packages and click-through projects offered by airlines. These reforms are likely to accelerate the shift to online and also see the long-term shift towards independent bookings resume.

- Study the terms and conditions of major safari tour operators in each of the source markets as they will reflect the relevant regulations regarding travel and consumer laws. They will also give you insights as to what they expect from partners.

### Non-legal requirements

- **ISO standards for adventure tourism.**
  - ISO 21102 Adventure tourism/Leaders/Personnel competence (published 2013) - indicates what the market normally considers as desirable competencies and the related expected results of competencies for adventure tourism activity leaders common to any adventure tourism activity.
  - ISO 21101 – safety management systems for adventure tourism.
  - ISO 21103 – information for adventure tourist participants.

As safaris are included within the adventure tourism market, these standards can serve as a guideline to improve competencies and

### Considerations for action

- Study the ISO standards for adventure tourism. [www.iso.org](http://www.iso.org)

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Source: CBI Market Information Database • URL: [www.cbi.eu](http://www.cbi.eu) • Contact: marketintel@cbi.eu • [www.cbi.eu/disclaimer](http://www.cbi.eu/disclaimer)
Sustainability labels. Increasingly, safari-goers are looking for safari experiences which can demonstrate a high level of sustainability, preservation of animal habitat and animal protection. In the region, safari outfitters in Botswana are especially committed to sustainability as a ‘way of life’.

STEP (Sustainable Tourism Eco-certification Program) is becoming the ‘gold standard’ in sustainable tourism certification and has a number of southern African partners including Namibian Tourism and Botswana Tourism. The International Ecotourism Society www.ecotourism.org has developed a range of ecotourism guidebooks on certification, in conjunction with TIES, the Rainforest Alliance and the Center of Ecotourism and Sustainable Development, which are available for download, along with a collection of reports.

Check out the latest sustainable and green certification programmes to assess the most suitable for safari tourism in Zambia including:
- Sustainable Travel International www.sustainabletravel.org has a range of Sustainable Tourism Education Programmes (STEP) and is the only global sustainable tourism certification programme offered by a non-profit organisation, and is aligned with GSTC.
- Global Sustainable Tourism Council (GSTC) www.gstcouncil.org
- Green Globe www.greenglobe.com

Consult the Swedish Ecotourism Society www.ekotourism.org to find out about ecological travel practices and standards accepted by Swedish responsible tour operators and travellers.

For more information about the expectations of tourism buyers in the EU+EFTA tourism market in general, refer to CBI’s ‘ Buyers’ Black Box’ for tourism.

**Trade and Macro-Economic Statistics**

**Outbound travel statistics**

**Figure 1: Outbound Tourism from the United Kingdom, Germany, Sweden, Norway, Denmark and Finland to sub-Saharan African Destinations, 2008-2012**

Source: CBI Market Information Database • URL: www.cbi.eu • Contact: marketintel@cbi.eu • www.cbi.eu/disclaimer
Notes:
- Botswana outbound figures from 2009-2012 are estimates
- Namibia outbound figures 2012 are estimates
- No figures are available for outbound tourism to Kenya

2012 a good year for some sub-Saharan African destinations: Southern and East African destinations saw increased arrivals from all source markets. South Africa is the leading destination in the region and has witnessed growth in arrivals in 2012 from all countries. In particular, arrivals from Norway grew by 12.7% while Denmark grew by 9.5%. In addition, growth was notable from Germany at 13.0%. Competing destination Tanzania also performed well in 2012 with particularly notable growth from the Scandinavian countries: from Sweden, growth of 88.3%, Norway 58.6% and 37.2%. UK arrivals to Tanzania also increased in 2012, by 19.4%.

Tanzania model destination: in 2013, Tanzania was rated the top safari destination by customers of online tour operator Safaribookings.com for quality of product, value for money and ease of access from European destinations. Botswana and Kenya were the next highest rated destinations.

Zambia: arrivals from source markets in the UK, Germany, Sweden and Denmark have all fallen between 2011 and 2012. It is likely that alternative destinations such as Tanzania and South Africa have been selected as alternatives, owing to a strong product and effective marketing.

Upcoming destinations: statistics show that the upcoming destinations include Rwanda (which has an iconic species) and Botswana (which has one of the best sustainable tourism reputations in sub-Saharan Africa). Source markets most interested in these destinations are:
- Rwanda – Germany, Sweden, Norway and Finland
- Botswana – Norway and Denmark

Considerations for action
- Source markets in Germany, UK and Scandinavia are increasingly interested in travelling to sub-Saharan destinations. Effective targeting to all markets is required to increase arrivals to Zambia.
- Talk to European tour operators to research and identify reasons that Tanzania is a leading safari destination of choice, understanding their competitive advantage will support your own strategy and forward planning.
Tourism expenditure

**Scandinavia:**
- Scandinavians are high-value outbound tourists with a relatively high per-capita spend, since the decline in 2009, expenditure by Swedish and Norwegian outbound tourists has recovered strongly.
- Danish travellers are the most conservative spenders and look for bargains and discounts; average trip expenditure has fallen since 2007, when the Danish economy was stronger.
- Norway is a lucrative target market for overseas destinations with a high average expenditure per trip, and is regarded as a wealthy nation.
- Sweden accounts for the largest volume of Scandinavian outbound travellers and therefore total expenditure is the highest. However, they are conservative spenders who look for value for money and package deals that enable them to upgrade to better quality and luxury add-ons.
- In 2011, average expenditure on outbound travel was reported to be:
  - Norway - €1,228
  - Sweden - €880
  - Denmark - €715
- Typically, length of stay is more than four nights for outbound travel by Scandinavians with Danish tourists staying longer than Swedes or Norwegians.

**Germany:**
- German outbound travellers are one of the biggest spenders. Since 2009, expenditure on overseas trips has continued to rise and in 2011, outbound expenditure increased to €61.3 billion, an increase of 3% on the previous year. High disposable incomes will continue to drive this rise in expenditure as the economy grows.
- However, Germans are budget-conscious and price sensitive and all-inclusive resorts have become more popular. Independent travellers like to use the Internet to put together their own holiday packages.

**UK:**
- The UK overseas holiday market has not yet risen to pre-2009 levels, although it is predicted that the economic recovery should result in the overseas market volume and value enjoying steady growth from 2014 onwards. Packages are proving particularly popular as they continue to evolve to offer value for money, greater choice and sophistication, plus an increase in the number of tailor-made and bespoke tours which are often a model adopted by the safari market. In 2012, UK visitors spent €39.8 billion on overseas trips, an increase of 2.5% on 2011 (€38.9 billion) and an average expenditure per trip of €735, up from €716 on the previous year.
- Although the general British holidaymakers is price conscious, holidays are important to them and they will spend money on an exceptional experience such as a safari. They will do a lot of research to ensure they get value for money so consider including add-on activities within the overall price.
- Despite the economic recession the luxury market is still strong. If you can deliver a luxury project consider targeting this market.

Considerations for action

- Value for money: For all markets, promoting value for money offers is crucial. Recovery from the economic crisis is ongoing but consumers are cautious and budget conscious. Package holidays should be a serious consideration for the Danish and Swedish markets as all the costs are paid up front and consumers feel 'protected' from hidden extras.
- Target the Norwegian's with more up market and luxury offers.
- Germany is a key target market. Consider producing a German version of your website.
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(2.7% growth).

For more information on tourism trade statistics and macro-economic indicators in the EU+EFTA market, refer to CBI’s ‘Tradewatch’ for tourism.

Market Trends

Social market drivers

- **The EU population is ageing but staying active much longer** and by 2025 the over 60’s will hold 50% of the world’s wealth. These older consumers in Germany, Scandinavia and the UK want to keep their body and mind stimulated and meet like-minded people. Germany has the highest share of senior people, both in relative terms and in absolute numbers as the country has the largest population in the EU.

- ‘Experiential holidays’ that offer the holidaymaker new experiences and stories to tell when they return home are in demand. Safari holidays in new destinations such as Zambia offer such opportunities.

- High-tariff, low-volume safari tourism provides an opportunity to ensure the longevity of the ‘experiential’ safari holiday for future generations by protecting animals and preserving the eco-system. However it needs to be underpinned by a nationally led sustainability strategy as has been achieved in Botswana.

- **Media coverage:** European safari-goers from all markets are highly influenced by media coverage crossing all channels – TV, radio, newspapers and magazines. Safari-goers are particularly susceptible to ‘aspirational’ marketing and profiling, such as features about the destination, the wildlife and safari options and activities.

Technology market drivers

- **Internet technology is now at the heart of the ‘holiday journey’** from destination choice, trip research, booking methods, ‘in country’ local guides and information, recommendations to friends and post visit feedback and reviews. Potential safari tourists in Germany, Scandinavia and the UK of all ages will be using the Internet for most if not all stages of their holiday.

- Digital marketing is an increasingly sophisticated activity and can be very time consuming. If your business is big enough, dedicate someone in your team to be proactive in social media activity and to manage the SEO for your website.

- The instant access to businesses provided by the Internet means that users expect instant replies. Ensure that you are responsive and reply to enquiries quickly. You can always add more information later.

- **Considerations for action**

  - To tap into this growth market talk to tour operators in the source countries to understand what type of safari experience these holiday makers expect in terms of activities, facilities, the level of services, health and safely, medical facilities, insurance etc.

  - Create opportunities for guests to encounter wildlife in way they may not expect, experience local traditions in a personal way (rather than staged traditional dances), by talking to villagers or learning a local skill or craft.

  - Participating in conservation schemes that protect wildlife and benefit local communities, and lobbying for high levels of sustainability across the industry is a long-term approach to ensuring you can offer a high quality safari product to into the future.

  - Good PR is needed to achieve coverage in the ‘aspirational’ press – travel magazines and supplements of national newspapers, e.g. Conde Nast Traveller and Wanderlust magazines and the Sunday Times travel supplement (UK); Vagabond and RES Travel Magazine in Sweden. If these publications publish articles about Zambia or your location leverage them by promoting the articles your website and including links, even if your business isn’t mentioned.
Social media use is on the increase in all markets and provides immediate word-of-mouth marketing opportunities as well as driving improved search engine optimisation (SEO) ratings.

Internet calls and texting means that guests can contact their families at home for free and send home photos and videos of their holiday if they can get online. If they are telling their social group about the excellent safari they are having, it is the best form of marketing. If possible offer Wifi is all or some of the rooms and public spaces.

For more information on market trends on the EU + EFTA tourism market in general, refer to the CBI’s ‘Trend Mapping’ for Tourism.

**Market Channels and Segments**

For further information and an illustration of the range of distribution channels in these markets visit the CBI Tourism Channels and Segments website page.

**Figure 2: Distribution of Zambian safari tourism products to the German, Scandinavian and UK markets**

- **Focus on specialist safari tour operators in each source market:** established tour operators have the potential to be the best

- **Considerations for action:**
  - If possible meet these tour operators so you can build a strong personal relationship and understand their business needs and
trading partners. They are experts in their own market and understand their customers and what they want. Generally, they are keen to work with local ground operators who understand the business and can look after their customers.

- **Directly target safari travellers in each source country:** the Internet is the primary source of information for independent travellers from Germany, Scandinavia and the UK. Younger safari travellers will use social media site whereas the older age groups are more likely to focus on Google searches.

- **Recommendations from friends and family** are the other most important influence on holidaymakers’ choice of destination and holiday activities. For younger generations this includes social media recommendations.

Trade associations, trade fairs and consumer magazines and newspaper supplements can be good sources for finding specialised tour operators for safari and adventure holidays. Social networking sites are important sources of information for consumer attitudes. Examples of such sources are:

**Trade Organisations and Associations**

**UK**
- Association of British Travel Agents (ABTA) [www.abta.com](http://www.abta.com)
- British Association of Independent Tour Operators (AITO) [www.aito.com](http://www.aito.com) has a search facility to find specialist tour operators

**Germany**
- Forum Anders Reisen [www.forumandersreisen.de](http://www.forumandersreisen.de) association of operators committed to sustainable tourism
- German Travel Association (DRV) [www.drv.de](http://www.drv.de)

**Scandinavia**
- Association of Danish Travel Agents and Tour Operators [www.drf.dk.dk](http://www.drf.dk.dk)
- Association of Finnish Travel Agents [www.smal.fi](http://www.smal.fi)
- Association of Swedish Travel Agents and Tour Operators [www.srf-org.se](http://www.srf-org.se)
- Norwegian Travel Trade Association [www.virke.no](http://www.virke.no)

**Trade and Consumer Shows**

**UK**
- Adventure Travel Show [www.adventureshow.co.uk](http://www.adventureshow.co.uk)
- Destinations Show [www.destinationsshow.com](http://www.destinationsshow.com)
- Telegraph Outdoor Adventure & Travel Show [www.telegraphoutdoorshow.co.uk](http://www.telegraphoutdoorshow.co.uk)
- TNT Travel Show [www.march-2014.tnttravelshow.com](http://www.march-2014.tnttravelshow.com)
- World Travel Market (WTM) [www.wtmlondon.com](http://www.wtmlondon.com) is the world’s largest travel market held annually in November

**Germany**
- ITB Berlin [www.itb-berlin.de](http://www.itb-berlin.de) the largest trade show in the EU market held annually in March

**Scandinavia**
- Ferie for Alle [www.danishtravelshow.com](http://www.danishtravelshow.com)
Market Competitiveness

- **Strong competition from African destinations:** East and Southern African destinations are the world’s leading safari destinations. Top destinations are rated by consumers (see figure 3 below) who base their opinions on quality of experience, value for money and ease of access. Travel publications are useful ways of assessing the competitiveness on a subjective basis within the marketplace between destinations (see figure 4 below).

- **Understanding competing safari destinations enables better market positioning of your product:** arguably the two leading southern African safari destinations are South Africa and Botswana, for different reasons. South Africa has some of the best wildlife viewing and is highly accessible. Botswana is regarded as the leading sustainable and responsible tourism destination and provides for low volume, high tariff holidays which appeals to a certain group of wealthy tourist. The study of neighbouring markets and what they focus on to differentiate their product will help to identify features that will appeal to the safari tourist.

**Considerations for action**

- Assess competitive ratings from users and travel experts to build picture of African safaris market.

- Research other destinations that have a similar offer to your own. Find out what they offer, pricing models, how they present their websites and how they are presented on European tour operator websites.
Safari destination awareness: A key competitive factor for safari destinations is the positive association with abundant wildlife, any iconic species and accessibility.

Assess your own product to identify key species and activities that compete effectively with market leaders, e.g. Zambezi River: what activities can be found, what animals can be seen, what facilities there are.

Figure 3: SafariBookings User Ratings of African Safari Destinations, 2014

Source: SafariBookings.com

Figure 4: Top 10 African Safari Destinations 2014

<table>
<thead>
<tr>
<th>Country</th>
<th>Safari Destination</th>
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<tbody>
<tr>
<td>Uganda</td>
<td>Bwindi Impenetrable Forest Reserve</td>
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<tr>
<td>Namibia</td>
<td>Etosha National Park</td>
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<tr>
<td>Botswana</td>
<td>Chobe National Park</td>
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<tr>
<td>Kenya</td>
<td>Mosai Mara National Park</td>
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<td>Zimbabwe</td>
<td>Hwange National Park</td>
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<td>South Africa</td>
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<td>Rwanda</td>
<td>Volcanoes National Park</td>
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<td>Serengti National Park</td>
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<tr>
<td>Mozambique</td>
<td>Gorongosa National Park</td>
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Source: Fodor’s Travel

For more information on market competitiveness on the EU+EFTA tourism market in general, refer to CBI’s ‘Market competitiveness’ for tourism.

Useful sources

- ResponsibleTravel.com [www.responsibletravel.com](http://www.responsibletravel.com) is an online travel agency that promote local responsibly managed holidays including Zambian safari operators.
- Sustainable Tourism Certification Alliance: [www.sustainabletourismalliance.co.za](http://www.sustainabletourismalliance.co.za)
- Research Foundation [http://www.fur.de](http://www.fur.de) for research and statistics on the German market
- Rejseliv [www.rejseliv.dk](http://www.rejseliv.dk) – Danish online travel forum and electronic travel magazine, including news and travel trends on wildlife tourism in Denmark
- Reiseliv – [www.reiseliv.no](http://www.reiseliv.no) - Norwegian online travel forum which includes information on wildlife tourism (‘Natur safari villmark’). Use this website to follow travel trends in Norway
- Swedish Ecotourism Society [www.ekoturism.org](http://www.ekoturism.org) stimulates ecotourism within Sweden and abroad. Use the website to find out more about ecological travel practices and standards accepted by Swedish responsible tour operators and travellers.

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