



REPUBLIC OF NAMIBIA

MINISTRY OF ENVIRONMENT AND TOURISM

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11th January 1997
 Ref: N/24/5/1/7/5

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 Anna Davis and colleagues, IRDNC
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 Peter Uuravi, Purros

cc: Leon van Rooyen, Resource Management
 Hennie Fourie, Tourism
 Chris Brown, DEA

From: Rob Blackie

Re: Final Tourism numbers in Kunene

Finally the tourism numbers for Kunene are complete. Michael and Willem have spent December and some of January processing the data, estimating figures where there are gaps and analysing it. I have included with this letter our summary of the results, which includes total numbers of tourists for each destination, and figures on the nationality of tourist and the types of vehicles used where we have them. As you will see some of the data is extremely up to date, so can be used to get a preliminary idea of what was happening in 1996. Many thanks to everyone who helped Michael and Willem collect the statistics.

The results from the data largely confirm the preliminary findings that Caroline outlined last year. There are however some additional findings worth noting.

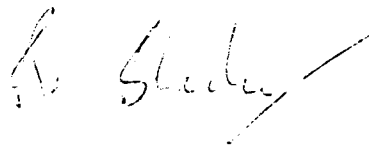
- Private sector accommodation is largely used by foreigners, and total numbers are rising.
- Seasonality is very marked, and slightly different if one compares Namibians to foreigners. At Springbokwasser and Ugabmond the proportion of "other" tourists (ie Those not South African or Namibian) is relatively higher during the second half of each year.
- The growth trends are very different for Skeleton Coast national park, which has seen virtually no growth in the number of visitors, compared to all other areas which appear to have had significant growth. MB

It is worth emphasising that some of the data was estimated to help with comparisons between years. Since seasonality seems to be fairly regular across years estimation probably doesn't present too many problems, but users should be aware of the limitations.

The data is held at the DEA on diskettes in Microsoft Excel and we are happy to distribute it to anyone who wishes to use it for their own purposes, or we can carry out further analysis on request.

Finally for those of you who have not met me yet I should introduce myself as the new economist at the DEA, replacing Caroline Ashley. I will continue to be involved in the work that Caroline was involved in. I will also be involved in supervising three economics trainees at the DEA, including Michael Humavindu.

I hope these help you in your work.
Yours sincerely,



Rob Blackie.

REPORT ON TOURISM DATA IN KUNENE REGION
MINISTRY OF ENVIRONMENT AND TOURISM
MICHAEL HUMAVI JDU & WILLEM NEKWIYU
DECEMBER 1996

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1. Introduction

Tourism industry is one of the fastest growing industries in Namibia and its contribution to economic and social development is indispensable. However sound management is required for the country to be able to benefit from this sensitive sector of the economy while sustaining it for future generations. To help plan for sustainable utilization of natural resources, sufficient, reliable and relevant information is required. As part of accomplishing this objective, research was conducted in Kunene region to try to determine the number of tourists and the trend of tourism growth in the various places. The data collected dated as far back as the records are available. Unfortunately proper recording and storing data let us down for most sites we planned to analyse the data for. Nevertheless we hope the information drawn out of the available data will help interested parties and will contribute to making sound decisions in terms of tourism industry development and environmentally sustainable management.

The results of this work is due to the hard work and assistance from people at MET's offices and tourist sites, NGOs especially NNF and Save the Rhino Trust as well as within communities in Kunene Region. We therefore extend our gratitude to them for their assistance and cooperation. Finally we would like to thank Rob Blackie and Caroline Ashley for their patience while editing this work.

2. Research Methodology

Research for the collection of data was carried out through various ways.

Data was collected by using Entry books from the various tourist sites and which then summarised. This has supplemented by some other data within the ministry and from NGOs such as NNF and Save the Rhino Trust which were already summarised to certain extent.

However for some places data was rough and there were many gaps in the data. This led us to estimate data as a means to fill in the gaps in the raw data and enable us to compare and analyse data for different years and places. Estimations were done using the following formula: It is based on the assumption that visitors for the missing period have changed in proportion to changes during other periods of the year. For instance, for a particular month a ratio of monthly visitors to total number of visitors per year is assumed to be the same as the previous or subsequent year's ratio for the same month.

It must be stressed out that due to estimation of the data, users should be cautious when it comes to analysis and looking for implications.

3. Analysis for Individual places

3.1 Place: Springbokwasser Gate

Data: -Years/months covered: 1989-August 1996
-Source of information: Springbokwasser(MET)

Comments and Analysis:

The number of visitors through Springbokwasser gate has been stable (± 4000) from 1990 to 1995. However a significant decline is expected in 1996 looking at the first half of the year records. Looking at the last three years(1993-1995), there's been a decrease in the number for South Africans and Namibians. Overseas tourists on the other hand show a increase from 1993 to 1995.

3.2 Place: Ugabmond Gate

Data: -Years/months covered: October 1988-December 1995
-Source of information: Ugabmond Gate(MET)

Comments and Analysis:

Although there's been an overall increase of 7% from 1989-1995, each year's figures are totally different . Thus a trend can hardly be traced. The figures for 1992 (7129) and 1994 (7361) are in sharp contrast from the ones in 1995 (2654). There was a huge drop in the numbers of the three visitors groups. We do not know the possible explanation of the decrease, as there were no missing data or lost books. The percentage of South Africans has dropped from 28% in 1993 to 19% in 1995. Once again as at Springbokwasser, the percentage of Overseas tourists has increased from 25% in 1993 to 34% in 1995. The percentage of Namibians ranges from 45% to 47%.

3.3 Place: Ganamub

Data: -Years/months covered: 1993, 1994, Jan to April & Dec '95, Jan- June'96
-Source of information: Save The Rhino Trust (SRT)

Comments and Analysis

There's been quite a drop in visitors numbers from 1993 to 1994 (-43.4%). It is important to note that figures for Sept-Nov '94 are estimates and might not reflect real data for 1994. Looking at 1995 and 1996 data, a decrease in visitors numbers is also expected in 1995, but an increase can be expected in 1996. Also if estimates are correct the number of people going to the North increased in 1994 (58%) as compared to 1993 (51%).

3.4 Place: Twyfelfontein¹

Data: - Years/months covered: 1991-July 1996
- Source of Information: Khorixas Nature Conservation Office
Tony Delport (MET)

Comments and Analysis:

Since 1991, Twyfelfontein has seen an increase in visitors numbers, roughly 48%. However the period of 1994/95 showed a slight decrease in tourist numbers (18052) as compared to 1993/94 (18172). Average group size is constant at 4 people per group while groups also showed a steady rise from 1992/93 to 1994/95. The most popular vehicles are the 4*4s and Sedan 2*4s respectively. However in the first months of 1996, there were more Sedans than 4*4s. The percentages of Namibians and South Africans has been decreasing since 1992/93, but the Overseas tourists percentage rose from 73% (1992/93) to 81% (1994/95).

¹Total figures for Jan-Jul '96: 8645 visitors and 2185 vehicles. Visitors: 7% Nam, 11% RSA and 82% Other.

3.5 Place: Petrified Forests²

Data:- Years/months covered: 1991-July 1996

- Source of information: Khorixas Nature Conservation Office
Tony Delpont (MET)

Comments and Analysis:

Visitors to Petrified forest have increased at a constant rate of 10% since 1991 to 1993. There was a significant decrease in 1993/94 compared to the tremendous increase in 1994/95. The foreigners share of the total visitors and South Africans's ratio to Total foreigners have been the same. Once again as in Twyfelfontein, Sedans and 4*4s are the most popular vehicles used (See attached graph).

3.6 Place: Hoanib

Data:- Years/months covered: 1994-Sept 1996.

- Source of information: Save the Rhino Trust (SRT)

Comments and Analysis:

Visitors records for Hoanib showed an increase of 35% from 1994 to 1996. However data covering Jan-Aug '94 is an estimate and this must be taken into account. There is a slight decrease expected for 1996 compared to 1995, judging from the 1996 data for nine months.

²Total figures for Jan-Jul '96: 13724 visitors and 3346 vehicles. Visitors: 10% Nam, 18% RSA and 72% Other.

3.7 Place: Private sites

Private sites are **Palmwag Lodge, Etendeka Mountain Camp, Epupa Campsite and Khowarib Campsite**. Due to confidentiality the figures used are the averages of the aggregate totals of all sites.

Data:- Years/months covered: 1994-Sept/Oct 1996.

- Source of information: Private sites in Kunene region

Comments and Analysis:

There is a high percentage of foreigners to private sites compared to Namibians, and their percentage of total visitors is increasing. The number of visitors to different private sites varies, because it depends on the sites capacity and ability to attract tourists. The overall numbers of visitors recorded by these sites is indicating an increasing trend although it shows declining numbers at some places.

5. Implications and conclusion

Judging from the information available so far one can see that the overall number of visitors to Kunene region has increased, but not perhaps to the expectation of many. The number of visitors to the coast for example didn't change much, if at all, from 1989 to 1995. In some places like Petrified Forest the number of visitors has doubled since independence, while the number of visitors to Twyfelfontein and Epupa has increased by about 50% over the same period. For private sites some have registered an increase while others a decrease but the overall total figure has shown an increase of about 13%. The fact that some sites registered drops is probably due to increasing competition and that some sites are more popular than others among tourists.

The overall picture is of 25,000 or so visitors per year going to the accessible Damaraland sites of Petrified Forest and Twyfelfontein; 11,000 or so going to Skeleton Coast Park through these gates, and approximately 4000 or so, more adventurous tourists, going to Kaokoland. This last figure will perhaps seem surprisingly low to many people. This probably is due to the fact that many visitors to this part of the country do not necessarily camp at campsites where there are data recording books.

Growth trends have not emerged as strongly as might be expected, but some useful points can be extracted. There is no significant yearly change in number of visitors to the coast. There has been a positive yearly trend for visitors to accessible Southern Kunene (Damaraland) except in 1993/94 when there was a slightly decrease. The data has also shown a positive trend for visitor to Northern Kunene (Kaokoland) for the past few years.

Visitors by nationality shows foreigners tourists mainly visiting Twyfelfontein and Petrified Forest, Namibians mainly visiting Skeleton Coast Park, and a mixture of all nationalities to Northern (Kaokoland) areas. The share of foreign visitors in the total number of visitors has increased over the years in Kunene region especially at Petrified Forest and Twyfelfontein, and to the North (Kaokoland).

Seasonality is very marked, often with 20-30% of annual visitors coming in July/August. Lowest months are usually February and March.

Finally, despite the data problems we arrived at the following conclusion: It is clear that Kunene has a potential to grow as a tourism revenue generating destination as it is able to attract many foreigner visitors.

At this point we would like to recommend the use of a uniform system of recording tourism data at all possible recording points. This kind of system will enable data gathering and analysis of tourism data to be easier and more accurate. It will therefore enable proper planning in the tourism industry as this is still constrained by lack of data.

Springbokwasser

SPRINGBOKWASSER

SUMMARY OF TOURISM DATA

Total Numbers	1995	1994	1993	1992	1991	1990	1989
no. of visitors	4009	4572	4200	4166	3440	3573	4055
no. of groups	1224	1477	1116	1379	1126	1174	1190
Nationalities as % of Total							
S. Africans	14%	17%	15%	19%	16%	20%	30%
Overseas	42%	34%	33%	34%	26%	17%	10%
Namibians	44%	49%	53%	50%	57%	63%	60%

Seasonality (See attached graph of monthly % of visitors)

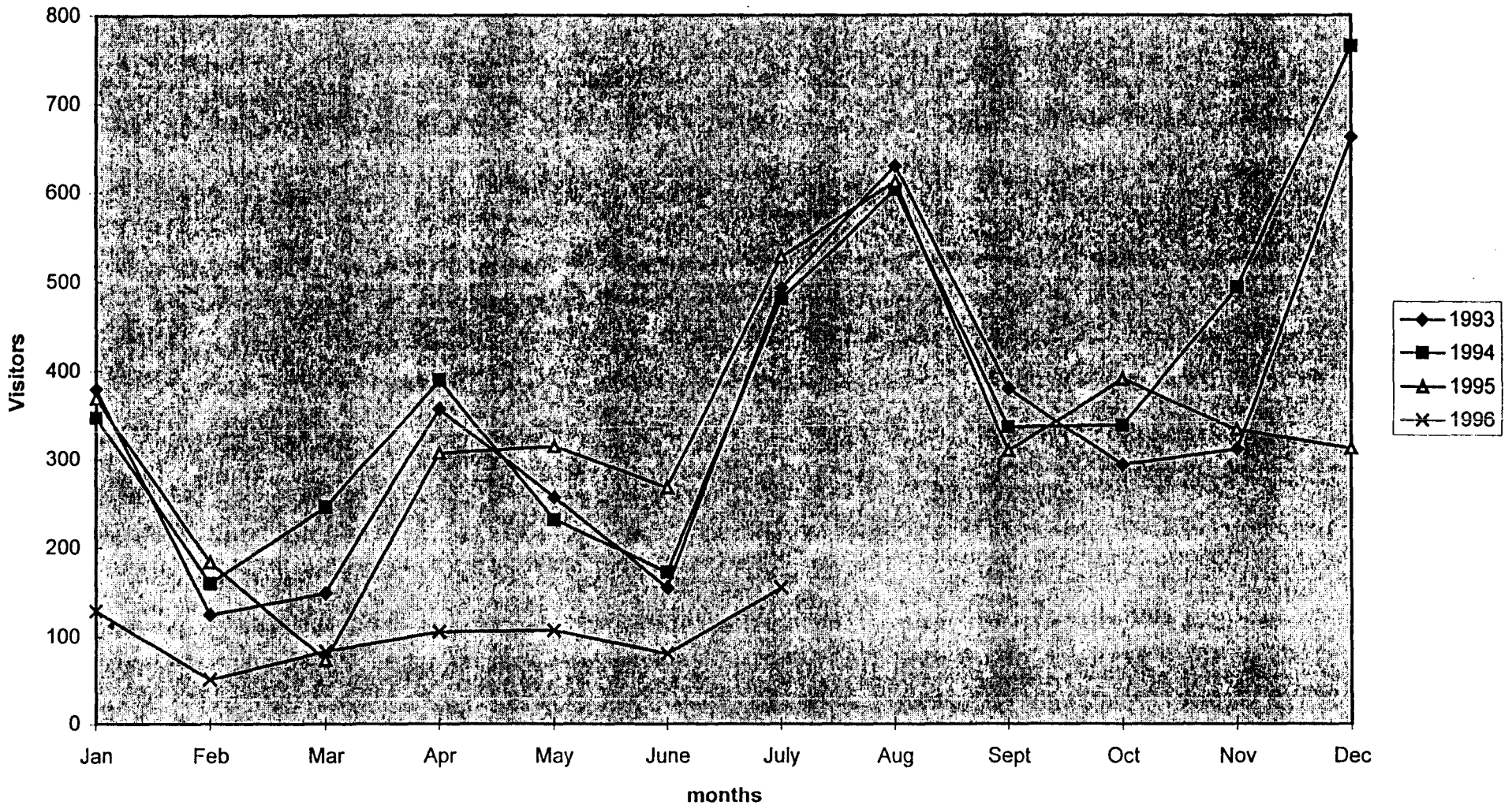
GROWTH TRENDS

Visitors Records for the- Last three years.	1995	1994	1993
Yearly Trends(% increase)	-12%	8%	0.6%

Overall Change

Period	no. of visitors	% increase (visitors)	# of vehicles	% increase (vehicles)
1989	4055		1190	
1995	4009	-1%	1224	3%

Springbokwasser tourism data:1993-1996,
Visitors records per year.



Ugabmond

UGABMOND

SUMMARY OF TOURISM DATA

Total Numbers	1995	1994	1993	1992	1991	1990	1989
no. of visitors	6242	7361	4146	7129	6306	4995	5851
no. of groups	2058	2154	1676	1154	959	523	377
Nationalities as % of Total							
S. Africans	19%	23%	28%	36%	33%	37%	45%
Overseas	34%	26%	25%	16%	15%	10%	6%
Namibians	47%	51%	47%	47%	52%	52%	48%

Seasonality (See attached graph of monthly % of visitors)

GROWTH TRENDS

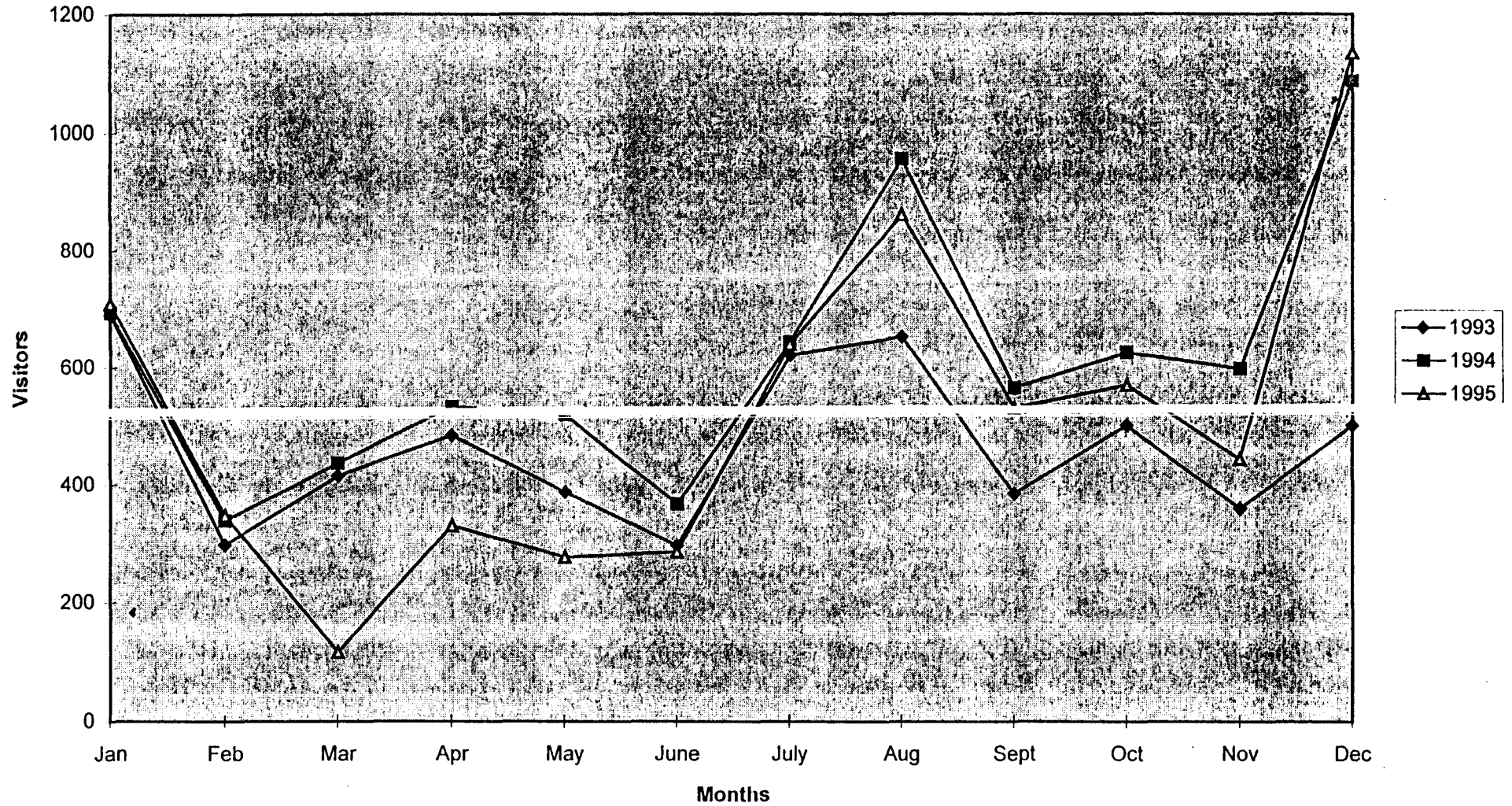
Visitors Records for the- Last three years.	1995	1994	1993
Yearly Trends(% increase)	-64%	78%	-42%

Overall Change

Period	no. of visitors	% increase (visitors)	# of vehicles	% increase (vehicles)
1989	5851		2032	
1995	6242	7%	2058	1%

Chart1Aggregate

Ugabmond Tourim data:1993-1995,
Visitors records per year.



Sanamub

GANAMUB

SUMMARY OF TOURISM DATA

Total Numbers	1994	1993
no. of visitors	2910	5137
no. of groups	594	1135

Destinations as % of Total

North	42%	51%
South	58%	49%

Seasonality (See attached graph of monthly % of visitors)

GROWTH TRENDS

**Visitors Records for the-
Last two years.**

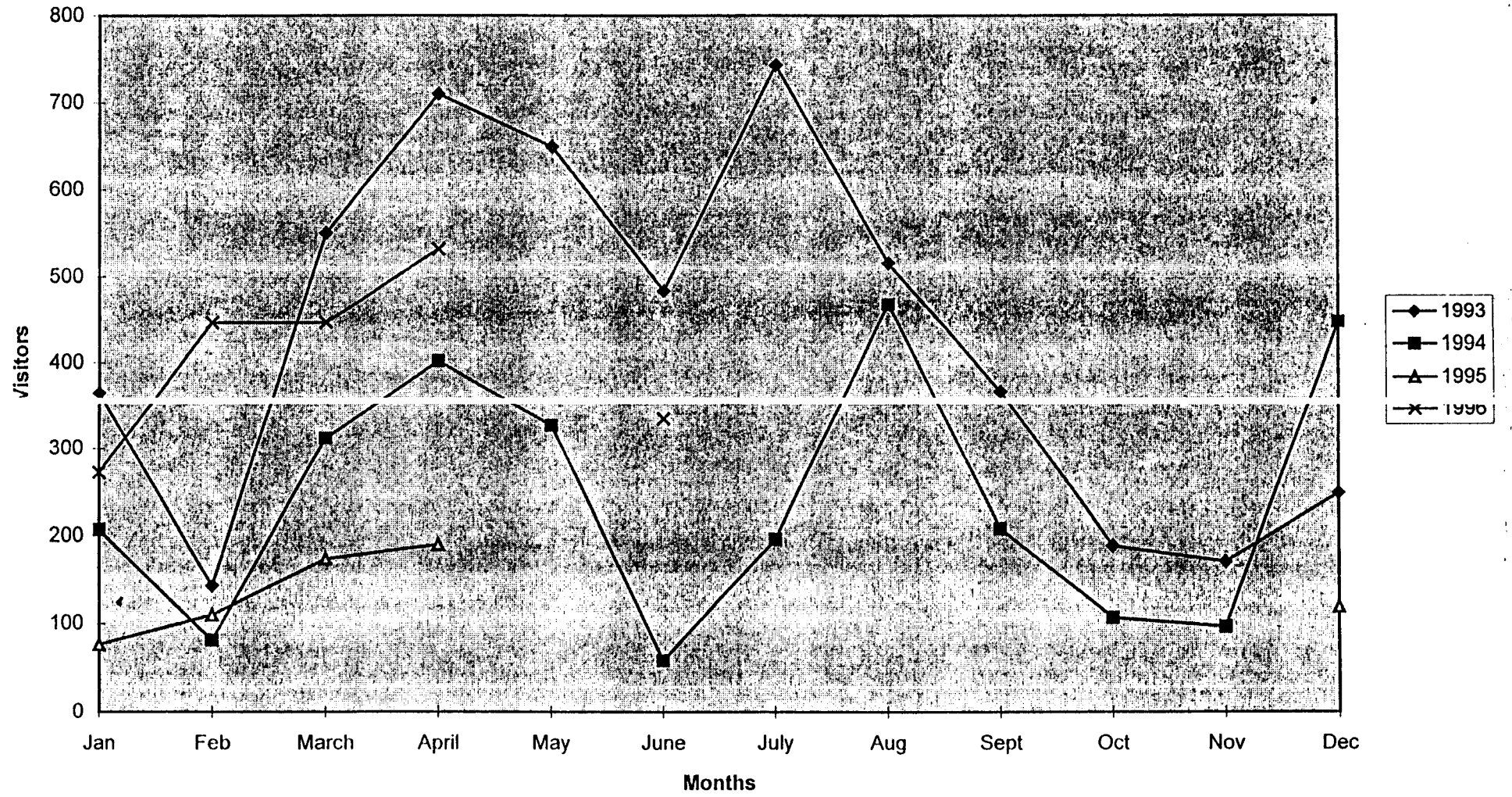
Yearly Trends(% increase) -43%

Overall Change

Period	no. of visitors	% increase (visitors)
1993	5137	
1994	2910	-43%

Chart1Aggregate

Ganamub tourism data -1993-1996,
Visitors Records per year.



ganamub

Twyfelfontein

TWYFELFONTEIN

SUMMARY OF TOURISM DATA

Total Numbers	1994/95	1993/94	1992/93	1992	1991
no. of visitors	18052	18172	17565	14282	12369
no. of groups	5276	4862	5369	N/A	N/A

Nationalities as % of Total

S. Africans	10%	16%	11%
Overseas	81%	70%	73%
Namibians	10%	14%	16%

Seasonality (See attached graph of monthly % of visitors)

GROWTH TRENDS

**Visitors Records for the-
Last three years.**

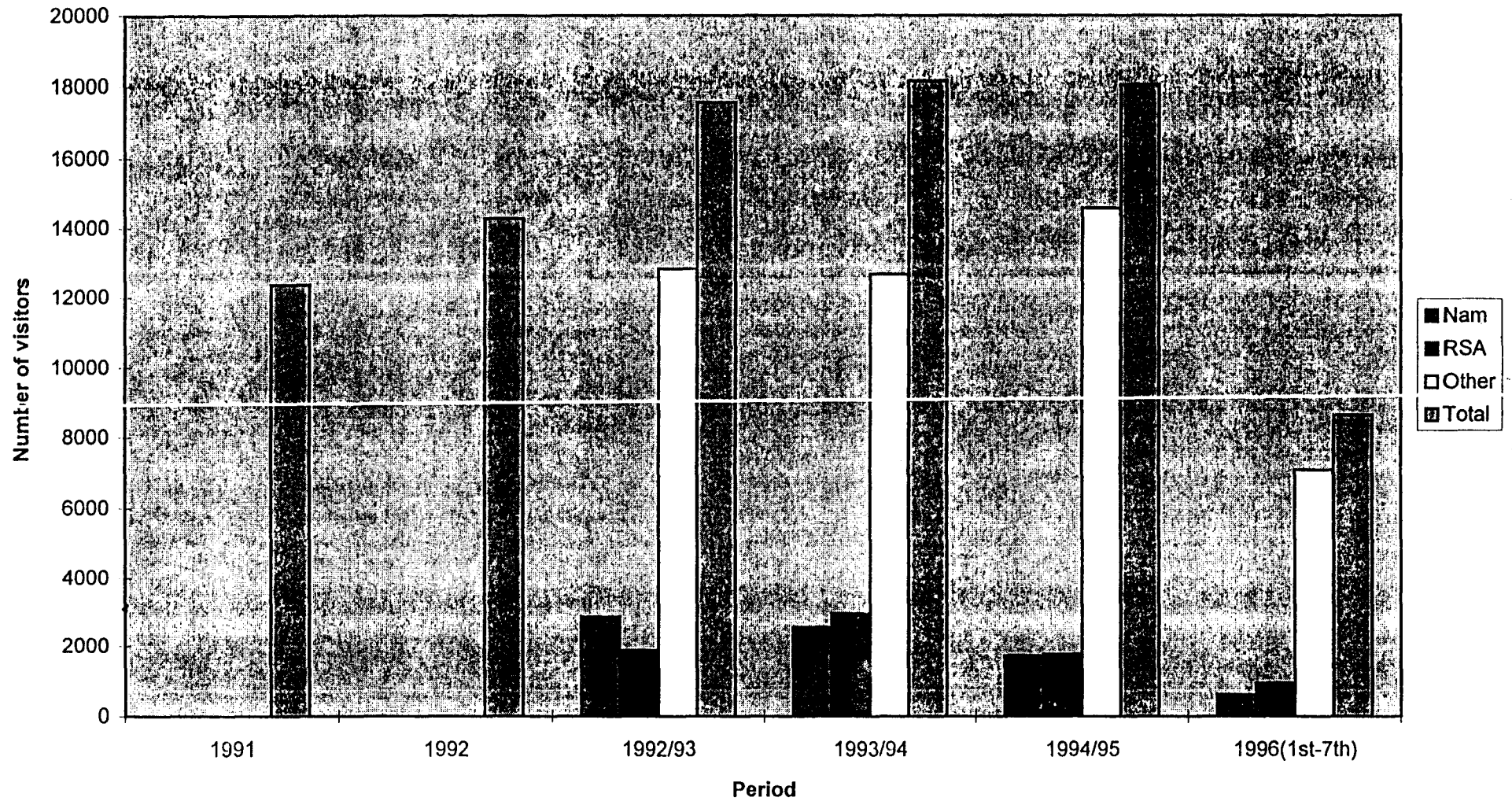
	1994/95	1993/94	1992/93
Yearly Trends(% increase)	23%	4%	-1%

Overall Change

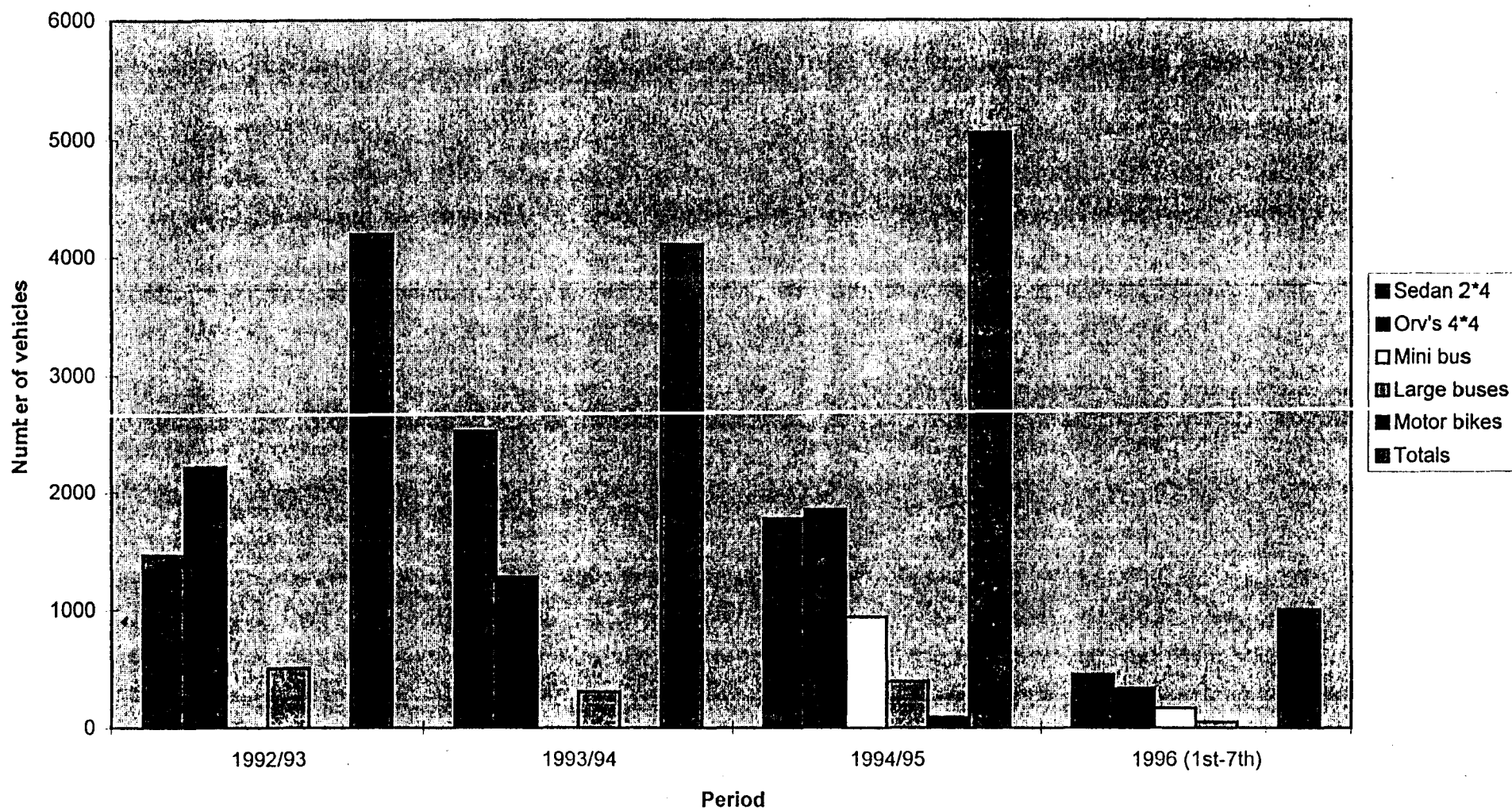
Period	no. of visitors	% increase (visitors)
1991	12369	
1994/95	18052	46%

Chart1'Visitors

**Twyfelfontein tourism Data-1991-1996,
Visitors Records.**



Twyfelfontein tourism data-1992-1996,
Vehicles Records.



Petrified Forests

PETRIFIED FORESTS

SUMMARY OF TOURISM DATA

Total Numbers	1994/95	1993/94	1992/93	1992	1991
no. of visitors	25372	13335	15359	13105	11056
no. of groups	6358	2681	3770	N/A	N/A

Nationalities as % of Total

S. Africans	11%	6%	11%
Overseas	77%	69%	76%
Namibians	12%	15%	14%

Seasonality (See attached graph of monthly % of visitors)

GROWTH TRENDS

Visitors Records for the-
Last three years.

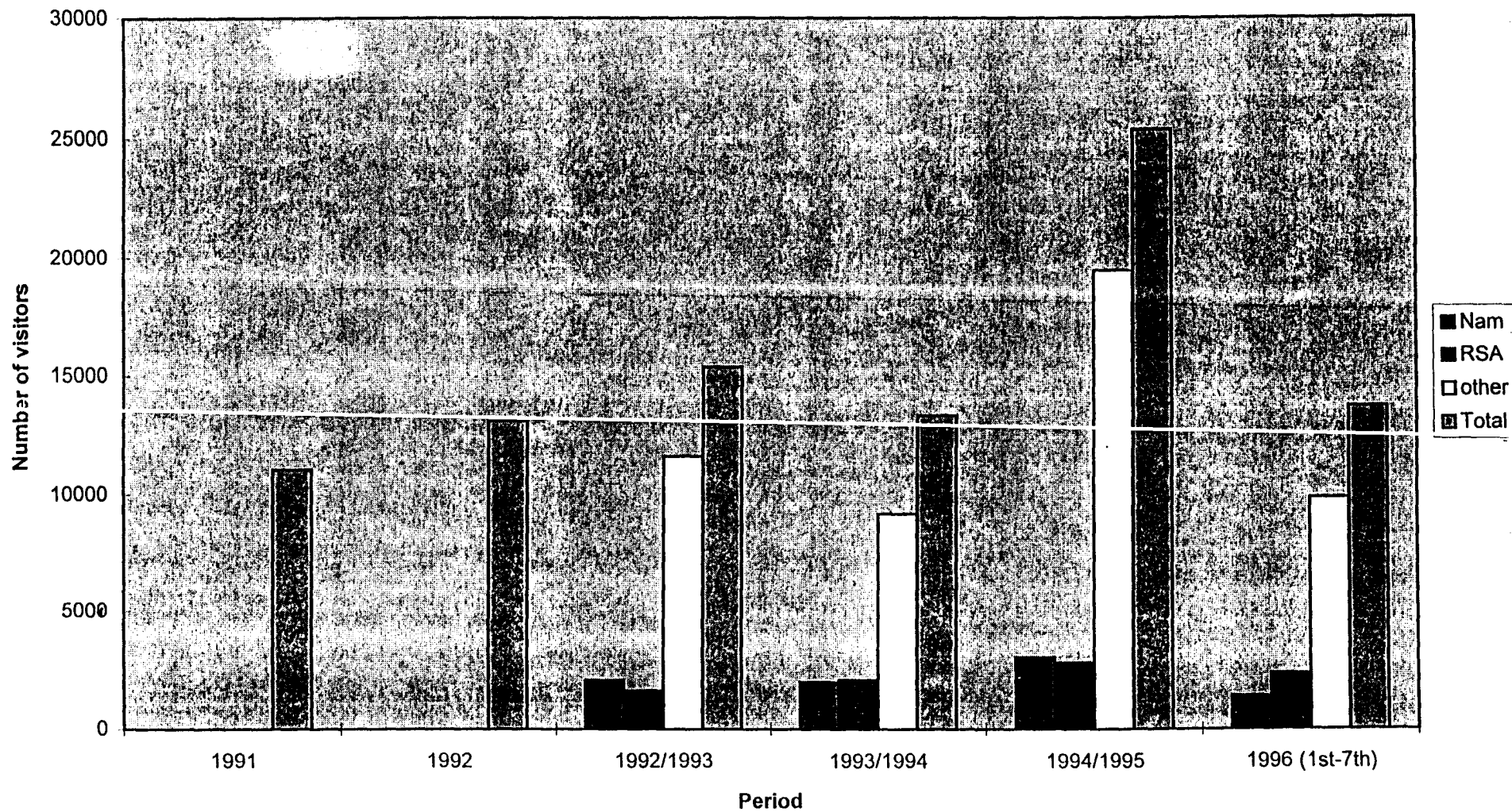
1994/95	1993/94	1992/93
90%	-13%	17%

Overall Change

Period	no. of visitors	% increase (visitors)
1991	11056	
1994/95	25372	129%

Chart1'Visitors

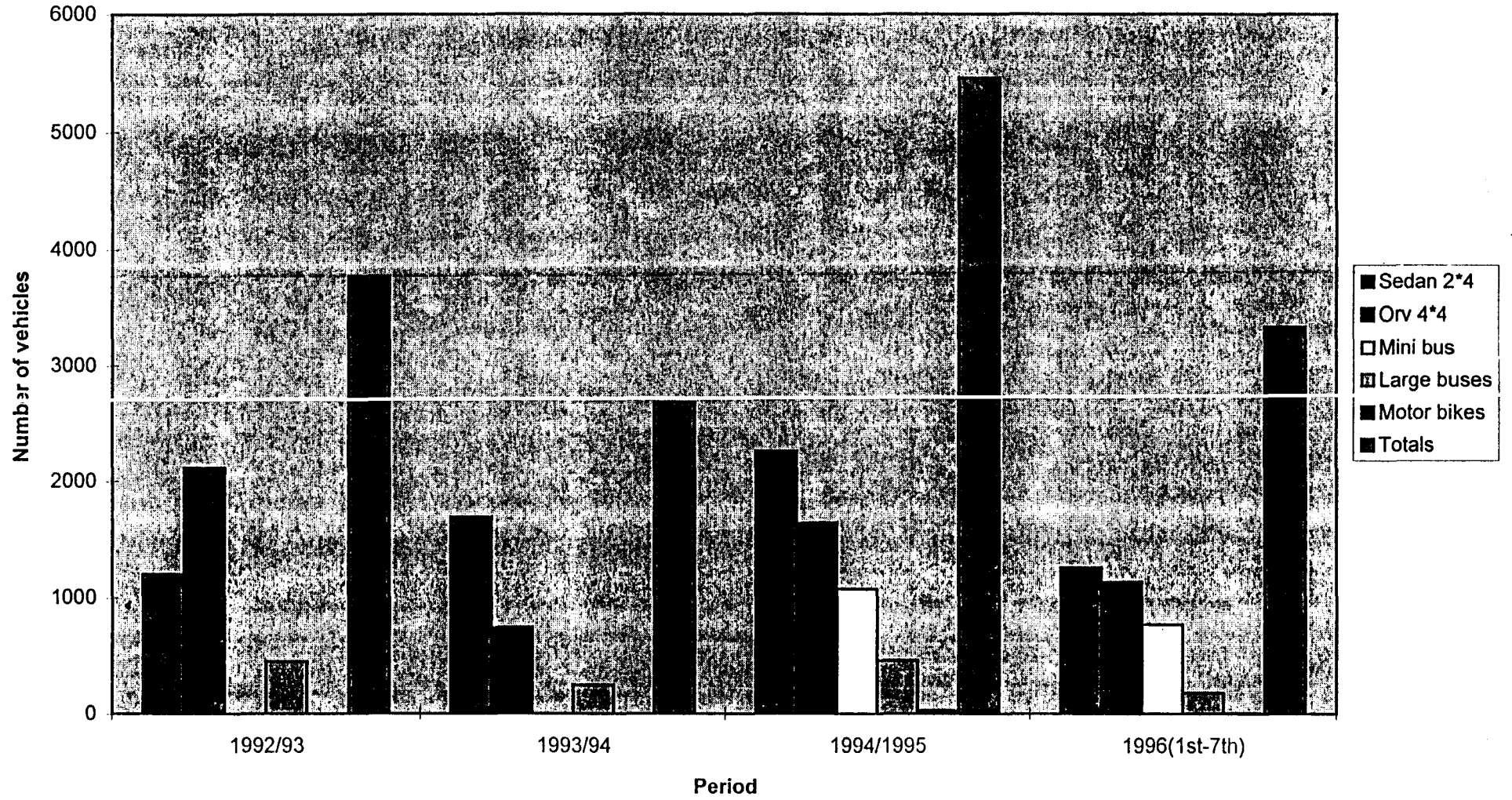
**Petrified Forest tourism Data-1991-1996,
Visitors Records.**



petrified

Chart2"Vehicles

**Petrified Forest tourism data-1992-1996,
Vehicles Records.**



Hoanib

HOANIB GATE

SUMMARY OF TOURISM DATA

Total Numbers	1995	1994
no. of visitors	2541	1883
no. of groups	718	450

Seasonality (See attached graph of monthly % of visitors)

GROWTH TRENDS

Overall Change

Period	no. of visitors	% increase (visitors)
1994	1883	
1995	2541	35%

**Hoanib tourism data-1994-1996,
Visitors Records per year.**

