



**LOMAKO YOKOKALA FAUNAL RESERVE, Democratic Republic of
Congo**

Business Plan for the Development of Scientific Tourism

DRAFT 1

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1. EXECUTIVE SUMMARY

The Lomako Yokokala Faunal Reserve, 3,625km², was officially gazetted in June 2006. The Congolese Institute for Nature Conservation (ICCN) is the authority responsible for its governance. AWF supports the ICCN in its efforts to manage this protected area in a participative way. AWF equally helps developing a management plan. One element of this management plan will be the development of tourism in this Protected Area.

The Lomako Yokokala forest is famous for its Bonobo (*Pan paniscus*) populations, an endangered primate with a range that is limited to the Congo basin. These primates that have been studied by a variety of scientific teams since the '70's. AWF is attempting to make the RFLY a viable "conservation enterprise" that allows to study bonobos in-situ, to identify current threats to bonobos and other key species in the MLW landscape, and simultaneously build the professional and educational capacity of Congolese conservationists that will lead to improved conservation measures for the critically endangered great ape and the forests in which they live.

For this, a research camp that will welcome both tourists as well as researchers will be designed as part of a comprehensive approach to bonobo conservation and to the development of the local communities. The incentive for researchers to use this infrastructure is that all is well organized and that a maximum of time can be dedicated to research.

The reserve shall explore a number of potential income streams that are positively correlated with conservation, as well as directly linked to the area. The most likely business opportunities for the reserve to develop in the future are:

- Scientific Research based tourism
- Wildlife Tourism based on Bonobo (*Pan paniscus*)
- Businesses based in sustainable harvest of vegetable products found in the periphery of the reserve

This document focuses on the two forms of tourism related income, and how it can contribute to the financial needs of the reserve.

MARKET OPPORTUNITY

▪ The Scientific Field Research Market

In the last years, the Scientific Research world has witnessed the emergence of a new kind of organisation that is providing a fundamental service to the community: field research stations in remote wildlife locations.

Research stations offer a much more cost-efficient way to study wildlife in remote destinations, and wherever possible, are the preferred choice for both researchers and donors.

▪ The Wildlife Tourism Market

The overall expected economic volume of nature-based tourism in Africa for 2010 has been estimated by Conservation Capital¹ at a minimum of US\$4.8 billion. While most of the volume will go to those countries with the best infrastructure and marketing, there is substantial opportunity for those remote and unexplored destinations which take advantage of an ever-expanding market.

Lomako stands to benefit from an emerging sector in the industry: highly adventurous travel. There is an increasing offer for trips where tourists will trek long hours in the heat of the day, sleep on the ground under mosquito nets, eat poorly cooked food, and venture into remote areas where emergency medical rescue is days away, if at all possible. Such exclusive experiences set them apart from the majority of their society, the contact with environments and peoples far removed from their daily existence.

While this segment represents a very small percentage of the overall tourism market, its absolute numbers are growing faster than the rest of the industry.

¹ Conservaton Capital, Conservation Tourism Market Estimates, 2005

COMPETITION

▪ The Scientific Field Research Market

The number of research stations worldwide seems to be expanding. Access to Chimps and Bonobos and their habitat, however, remains fairly limited to researchers. There are currently only a handful of research stations where scientists can study these species. Furthermore, in the majority of these research stations there is a requirement for scientists to be affiliated with the supporting academic institution that sponsors the station. This is the case for Lui Kota (next to Salonga National Park, DRC) affiliated with the Max Plank Institute in Germany, etc.

Pricing, however, seems to be relatively independent of species studied, and more linked to country/region. Issues such as the logistical costs involved in transporting supplies to the research site are also of importance.

▪ The Wildlife Tourism Market

Tourism packages focused on Great Apes have experienced an exponential growth in the last decades. The numbers of travellers who are willing to pay large amounts of money in order to spend some time watching the most charismatic primates in the wild is ever increasing. From Lowland gorillas (*Gorilla gorilla*) in Cameroon, to Highland gorillas (*Gorilla beringei*) in Rwanda, or Chimpanzees (*Pan troglodytes*) in Tanzania or Uganda, tens of thousands of eager visitors pay large sums for the privilege of seeing these animals in their media.

While some of the most successful and accessible destinations have integrated luxury lodges adjacent to the parks in which the great apes live (e.g. Mahale or Sabinyo), others are still offering mainly basic accommodation in tents.

Interestingly, **no other base for Bonobo-based tourism site is currently available**, mainly due to the political instability associated with DRC and inherent risks to travellers in the country. The entire geographical range for this species falls within the DRC. This could allow Lomako to turn itself into the leading destination for Bonobo based tourism. The competitive advantages of being a first-mover and establishing a solid brand in the marketplace are significant.

MARKETING PLAN

Product

▪ Common Attributes

From a product perspective, Lomako stands in a privileged position for both, Scientific Based tourism and general Wildlife Tourism. Unfortunately, the political instability of DRC, combined with the remoteness of Lomako pose a challenge in order to market the reserve.

The most remarkable characteristic of Lomako reserve is its physical integrity. The forest's vegetation cover remains virtually untouched, and the rivers are free of pollution and filled with life. Its aesthetic value is unquestionable, and constitutes one of the greatest strengths of the reserve as a tourist destination.

Biodiversity levels in the reserve are as large as one could expect to find in rainforests in equatorial Africa: virtually unmatched elsewhere. The presence of Bonobos, whose geographical range is limited to the Congo river basin and is all enclosed within the DRC guarantees the uniqueness of the wildlife product offered in Lomako.

The reserve offers remarkable opportunity in terms of educational and research potential. The main attraction of the reserve, the Bonobos, have been object of field research for several years thus becoming thoroughly habituated to human presence virtually guarantees sightings of the animals.

Local communities who have lived in harmony with the environment for many generations constitute an additional asset to the reserve.

The DRC does not provide much opportunity in terms of either scientific based tourism or specialist wildlife tourism. At present Lomako is very likely to be an almost 'stand alone' attraction for visitors to DRC.

Access to water is guaranteed year-round, and water is abundant. So are most construction materials.

Travel in and out of the reserve poses the greatest challenge for the success of Lomako as a tourist destination. Transport is complicated, unreliable and expensive. Only one company serves the flights between Kinshasa and Basankusu (800USD round trip), once a week. Tourists and scientists must expect to spend several days en-route between Basankusu and the Lomako Forest (after formalities in Basankusu, one need a 24hr non-stop canoe trip to reach Ndele.

Logistic difficulties linked to the reserve's remoteness and the limited access to goods and services throughout the country turn operation of tourism facilities in the DRC into a challenging and expensive endeavour.

- **Scientific Research Tourism-** Lomako will offer, however, much more than individual scientists could provide for themselves at affordable or feasible rates:
 - Access to study area and animals
 - Accommodation
 - Food & drinks
 - Internet access via VSAT
 - Communication (satellite phone)
 - Security
 - Research assistance
 - Transport

All these services, combined with the fact that a number of researchers will establish in the reserve, therefore creating a critical mass (if small), should contribute to Lomako becoming a reference point for wildlife research in DRC.

- **Bonobo Wildlife Tourism** - The key product attributes that define the wildlife tourism experience that will be offered in Lomako are:
 - Exclusive – being the first area where tourists can go visit Bonobos
 - Active – No frills, remote and adventurous destination
 - Low-impact – All aspects of the trip will be targeted at having minimal impact on the environment
 - Educational – Offering opportunities to witness not only Bonobos, but also the remote forest areas of DRC, and interact with local communities

Pricing

Scientific Research Tourism-

Pricing for such a unique area is difficult, as the validity of comparable pricing is quite limited. Given the fact that the only alternative site to study Bonobos in the DRC is linked to an academic institution, and that researchers must be linked to that institution in order to visit the site, one could argue that Lomako has a virtual monopoly in the Bonobo study outside of that academic institution.

DRC - Scientific Tourism

Bednight Rate Comparison

| Centre | Country | Average daily fee (US\$) | |
|---|------------------------|--------------------------|-------------|
| | | International | Domestic |
| Mpala Research Centre (top accomod.) | Kenya | \$32 | \$23 |
| Mpala Research Centre (cheapest accomm.) | Kenya | \$26 | \$22 |
| Way Canguk | Indonesia (Sumatra) | \$10 | \$10 |
| Danum Valley (top accommodation) | Malaysia | \$69 | \$51 |
| Danum Valley (cheapest accomm.) | Malaysia | \$22 | \$10 |
| OTS-La Selva | Costa Rica | \$55 | \$55 |
| OTS-Las Cruces | Costa Rica | \$55 | \$55 |
| OTS-Palo Verde | Costa Rica | \$55 | \$55 |
| Rocky Mountain Biological Laboratory | US | \$58 | \$58 |
| Smithsonian Tropical Research Institute | Panama (10 facilities) | \$70 | \$23 |
| UWA-Kidepo, Murchinson Falls, Queen Elizabeth | Uganda | \$3 | \$1 |
| ICTE-Ranomafana | Madagascar | \$33 | \$7 |
| BCFS-Budongo | Uganda | \$35 | \$0 |
| AVERAGE | | \$52 | \$26 |

Lomako reserve's facilities will have a simple pricing scheme, making a distinction between short and long term rates, and between domestic and international researchers.

Lomako - Scientific Tourism

Bednight Rates

| Short Term (daily fee) | | | | Long Term (daily fee) | | | | Comments |
|------------------------|----------------|----------------|----------------|-----------------------|----------------|----------------|----------------|--|
| International | | Domestic | | International | | Domestic | | |
| Sr. Researcher | Jr. Researcher | Sr. Researcher | Jr. Researcher | Sr. Researcher | Jr. Researcher | Sr. Researcher | Jr. Researcher | |
| \$50 | \$50 | \$0 | \$0 | \$35 | \$35 | \$0 | \$0 | Short term researchers are those staying less than 1 month |

Bonobo Wildlife Tourism -

Tourism linked to the endangered great apes can be very profitable. The market seems to bear high-prices, mainly due to limited access in numbers.

Prices for lodging seem to be very similar across the board, and the average rack rates for lodges in Chimpanzee or Gorilla sighting areas are almost equal. Pricing for accommodation is highly dependant on quality of premises and exclusivity.

Bednight Fees for Major Great-Ape Lodges in Africa

| Lodge | Rack Rate(pppd) |
|----------------------|-----------------|
| Average (gorilla) | \$410 |
| Average (chimps) | \$439 |
| Average (all) | \$423 |

A substantial difference, probably linked to rarity of the species, and limits to access, occurs between park fees charged for Chimps and Gorillas. For that reason, given the proximity between Bonobos and Chimpanzees, it is advisable that Lomako charges a park fee in the line with that charged for chimps, perhaps slightly above average (US\$80 pppd).

Park Fees for Major Great-Ape Parks in Africa

| Park | Park Fee (pppd) |
|------------------|-----------------|
| Average Gorillas | \$385 |
| Average Chimps | \$62 |
| Average (both) | \$183 |

The pricing for Lomako's tourists will depend on whether they come as part of an expedition organized by the reserve managing company, or they come as clients of third party tourism operators.

Lomako - Bonobo Wildlife Tourism

Bednight Rates

| Lomako Tourists (Direct) | | Third Party Tourists | |
|--------------------------|----------|----------------------|----------|
| Bednight Fee | Park Fee | Bednight Fee | Park Fee |
| \$450 | \$80 | \$220 | \$80 |

Distribution – Sales Channel

- **Scientific Field Research Accommodation and Facilities** - There are two main distribution channels for scientific research accommodation:
 1. Academic Partners
 2. Direct
- **Bonobo Wildlife Tourism** - sold through two channels:
 1. Direct – Using Lomako's website as the main vehicle, the reserve will be able to sell trips direct. The initial idea is to limit the number of trips by tourists to the reserve.
 2. Agents – Lomako will partner with a limited number of agents who will offer visits to the reserve.

Promotion Strategies

Promotion of the **Research Facilities** should be done by publications on the websites of specialist scientific organisations and academic institutions. Electronic mailings should be sent periodically to all potential clients, given that they are relatively easy to identify.

Promotion of **Bonobo Wildlife Tourism** in the reserve in order to develop sufficient brand equity to generate demand will be necessary. It is expected that part of this promotion will be undertaken by those specialist safari operators who sign agreements with Lomako (e.g. potentially World Primate Safaris, GoCongo, Discovery Initiatives, etc.).

Collaboration by AWF, and promotion through its website and newsletters could provide invaluable support for the reserve's marketing efforts.

SUMMARY FINANCIAL PROJECTIONS

2. The LOMAKO YOKOKALA FAUNAL RESERVE - CONTEXT

The Lomako Yokokala Faunal Reserve, 3,625km², has been officially gazetted in June 2006. The Congolese Institute for Nature Conservation (ICCN) is the authority responsible for its governance. AWF supports the ICCN in its efforts to manage this protected area in a participative way. AWF equally helps developing a management plan. One element of this management plan will be the development of tourism in this PA. Tourism refers to both real tourists as to researchers who want to conduct a study on the habituated bonobo population. AWF is leading the effort to establish this economical activity in the reserve. A site that will be able to welcome both tourists as researchers is in construction. The presented analysis should help to set “entry and bednight fees” and help evaluating the financial feasibility to make this reserve and its tourism a viable activity.

2.1. The Democratic Republic of Congo

The Democratic Republic of Congo was established as a Belgian colony in 1908. After independence in 1960, the country suffered instability, followed by 32 years of dictatorship by Mobutu Sese Seko. This period was marred with political instability and war which have rendered the country amongst one of the poorest in the world.

Mobutu's dictatorship was terminated, and followed by that of Laurent Kabila, who took power in 1997 and renamed the country the Democratic Republic of Congo (DRC). Political instability continued throughout Laurent Kabila's entire regime, and the country's development, especially in the western provinces remained on stall. After the assassination of Laurent Kabila in 2001, his son, Joseph Kabila was named head of State. His government held a constitutional referendum which was approved by majority in 2005, and won the subsequent elections in 2006.



At 2,345,410 sq km, the DRC is four times the size of countries such as France or Spain, and stands as the largest country in Africa. A sample of the effects of instability of development: by 2003, only 2.83% of its total surface was arable, and 110 sq Km of the total country's surface were irrigated land²

In 2008, DRC's population was 66,5 million, growing at 3.23%p.a. Its average life expectancy was 53.98 years and the median age was 16.5 years.

The country's economy, which suffered greatly from over two decades of war, has started to recover in the last five years. The per capita GDP is \$300. By 2000, the meagre economic output was composed 55% by agriculture, 11% by industry, and 34% by services.

² The World FactBook – DRC. <https://www.cia.gov/library/publications/the-world-factbook/index.html>

2.2. The Lomako Yokokala Faunal Reserve - History

AWF supported the ICCN in its effort to create this reserve. The Lomako Yokokala forest is famous for its bonobo populations that have been studied by a variety of scientific teams since the '70's. AWF is building on this reputation/opportunity to try to make the RFLY a viable "conservation enterprise" that allows to study bonobos in-situ to identify current threats to bonobos and other key species in the MLW landscape, and simultaneously build the professional and educational capacity of Congolese conservationists that will lead to improved conservation measures for the critically endangered great ape and the forests in which they live.

For this, a research camp that will welcome both tourists as well as researchers will be designed as part of a comprehensive approach to bonobo conservation and to the development of the local communities. The incentive for researchers to use this infrastructure is that all is well organized and that a maximum of time can be dedicated to research (without having to discuss deals with local communities, search for food, deal with logistical constraints as fuel supplies, etc).

Long-term bonobo conservation will depend on local involvement and commitment. Training, capacity building, the development of economic incentives for local communities, and the establishment of a comprehensive local wildlife-monitoring network will all contribute to successful bonobo conservation efforts and will play a critical role in the overall design of the research model.

The research station is, consequently, part of a larger suite of species protection and community conservation efforts that support each other, and will provide a foundation for the formalization of an about to be recognized 3,600 km² Lomako-Yokokala Forest Reserve. It will contribute financially to the development of the nearby communities.

2.3. Conservation Relevance

The bonobo (*Pan paniscus*) is classified as an endangered species (Red List, IUCN, 2004) and is included in Appendix I of the Convention on International Trade in Endangered Species of Wild Fauna and Flora. Fragmented information on trends in bonobo populations indicate that this species suffers from habitat fragmentation and hunting pressure (World Atlas for Great Apes and their Conservation, 2005). Information from recent observations at several specific 'historic' bonobo study sites is alarming (Furuichi & Mwanza, 2003; Dupain 2003). The only large-scale bonobo survey conducted to date (conducted under the MIKE Program of WCS) confirms a patchy distribution and threats of increased hunting and poaching largely motivated by political instability over the past decade³.

Bonobos (*Pan paniscus*) are limited in range to the left bank of the Democratic Republic of Congo's (DRC) Congo River region, in an area



³ Most of this section consists of extracts from AWF's "Bonobo (*Pan paniscus*) Research and Conservation: Lomako Forest, Democratic Republic of Congo" grant application submitted to the Arcus Foundation in April 2005.

of around 350,000 km² of tropical moist forest habitat. Accurate abundance estimates of the species are limited, largely because of the ape's patchy distribution, the lack of information on the absence/presence in specific areas, methodological problems for specific density estimations, and an understanding of the links between densities and habitat vs. human activities. Such data are urgently required in order to steer critical conservation strategies for the future.

The African Wildlife Foundation (AWF), as the landscape leader for the USAID-funded Congo Basin Forest Partnership Initiative's (CBFP) Maringo-Lopori Wamba (MLW) landscape (74K km²), has been working in this region of DRC since 2003. AWF facilitated baseline data collection in 2004 as there was not current information available on the state of biodiversity in the region. This information is needed for landscape wide Land Use Planning. A Threats and Opportunity analysis workshop was held in Kinshasa in December 2004. Stakeholders among other things identified the creation of the RFLY as a priority. The establishment of a research camp for the conservation and long-term management of this forest habitat for Bonobos was seen as a unique economical incentive for the local communities. As a 'flagship' species, research on bonobos and their habitat could, in turn, produce information related to creating strategies to protect other threatened species such as forest elephants, yellow backed duikers, and the endemic nCongo peafowl.

2.4. Local and International Partnerships

AWF works in partnership with the ICCN (Institut Congolais pour la Conservation de la Nature), the MECNEF (Ministry of Environment and Conservation of Nature, Water and Forests), and the Ministry of Rural Development, but is also setting up collaboration with DRC-universities. Additionally, AWF works closely with OSFAC (Observatoire Satellite Forêts Afrique Central), and with the University of Maryland.

All information collected and analyzed will be geo-referenced and become part of the monitoring system set up as part of the CBFP/USAID/CARPE initiative.

Activities implemented by AWF in the landscape are fully participative. AWF has been working for four years in close collaboration with local NGOs and representatives of local people living in the MLW landscape. As a result of long term consultations, negotiations etc., the complex landscape of local NGOs have organized a simplified network of NGO platforms for conservation-based development collaboration.

2.5. Working towards self-sustainability

Self-sustainability is a fundamental element in the development plans of the RFLY (the Lomako Yokokala Faunal Reserve). The management plan, as well as the funding obtained by the French Development Agency, is based on the proposition that the reserve should be able to generate sufficient income to cover a substantial proportion of its operating budget.

The reserve shall explore a number of potential income streams that are positively correlated with conservation, as well as directly linked to the area. The most likely business opportunities for the reserve to develop in the future are:

- **Scientific Research based tourism** – This is likely to constitute the main income stream, given the difficulty to access Bonobos in the wild for research. Remoteness and lack of resources will limit, however the potential for growth in income from this source.
- **Wildlife Tourism based on Bonobo (*Pan paniscus*)** – A potentially lucrative venture, wildlife tourism also poses substantial management and logistical challenges. The unique opportunity for tourists to interact with Bonobos in the wild is a substantial attraction, as is the remote location. The fact that this product is not only remote, but also based in a country like the DRC will significantly limit the potential expansion of tourism products in the short term.
- **Businesses based in sustainable harvest of vegetable products found in the periphery of the reserve** – From the pharmaceutical industry, to cosmetics companies,

tropical rainforests offer a large business opportunity in trading in some of the basic chemicals and raw products that can be obtained from their vegetation in a sustainable way. Further study of the different potential business opportunities in the reserve is necessary in the future.

This document will focus on the two forms of tourism related income, and how it can contribute to the financial needs of the reserve.

2.6. SWOT Analysis of the Reserve

The Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis is an analytical framework frequently used to study the least quantitative elements of a business or organization. This analytical technique attempts to summarize the main elements that can offer substantial growth and success opportunities and those that can pose a substantial risk for its existence.

- Internal aspects of the business or organisation (Strengths and Weaknesses)
- External aspects of the business or organisation (Opportunities and Threats)

| Strengths | Weaknesses |
|---|---|
| <ul style="list-style-type: none"> ▪ Healthy and viable Bonobo population ▪ Bonobos are semi-habituated to humans (allowing for easier game viewing) ▪ Support from solid international organisations (e.g. AWF) ▪ Remarkable tourism experience due to river-travel in combination with highly exclusive use of facilities ▪ Operational reserve with small research station in place | <ul style="list-style-type: none"> ▪ Remote destination ▪ Low level of staff professional competitiveness in tourism and lack of funding? ▪ High amount of time consumed on transport to-and-fro the reserve ▪ Lack of healthcare facilities and medical evacuation alternatives ▪ Lack of understanding of differences between Chimpanzee (<i>Pan troglodytes</i>) and Bonobo (<i>Pan paniscus</i>) amongst tourists ▪ Bad reputation of DRC ▪ Lack of brand-equity of Lomako |
| Opportunities | Threats |
| <ul style="list-style-type: none"> ▪ Creation of a solid reputation as the best site to study Bonobo in the wild ▪ Establishment of solid partnerships with a handful of tourism operators who can ensure steady and reliable income to the reserve ▪ Currently no other Bonobo study site exists which is not linked to a specific academic institution ▪ No other Bonobo based tourism site active at the moment ▪ Benefits derived from economic 'linkages' spreading through the local communities ▪ Potential for the establishment of sustainable ventures based on animal or vegetable products within the reserve | <ul style="list-style-type: none"> ▪ Risk of DRC becoming more politically unstable and security breakdowns ▪ Liability risks linked to potential legal claims in case tourists and/or scientists suffer personal damage in the reserve ▪ Potential advent of fierce competition through either new Bonobo sites, or from the Chimp (<i>Pan troglodyte</i>) sector |

3. THE MARKET OPPORTUNITY

The Lomako Reserve will offer, through the use of its facilities, what in fact constitutes two different products, targeted at two very distinct market segments:

- **Scientific Field Research Accommodation and Facilities.** Capitalizing mainly on the study of Bonobos (*Pan paniscus*), but also on the study of their habitat, tropical rainforest conservation, other fauna to be found in the reserve, and the interaction of human populations with their environment in the area.
- **A Wildlife Tourism Destination.** Focusing on the exclusive access to Bonobo (*Pan paniscus*), the remote and unspoilt wilderness in which these animals live, and the adventurous travel in and out of the reserve.

Each of these segments responds to different economic incentives. Their target potential customers substantially differ in 'needs' and 'wants'; as well as in price elasticity. The cyclic response to seasons, and their profile in terms of political and market instability is also significantly different.

The specific attributes of each of these demand segments makes them a much more attractive proposition as a combination, than they are as individual products. While one segment (wildlife researchers) should be engaged in a manner by which a steady and robust cash-flow stream can be generated, the other segment (tourists) should be targeted in order to maximize marginal profitability.

Moreover, each of these markets has different growth patterns, competitive dynamics and regulatory environments.

3.1. The Scientific Field Research Market

In the last years, the Scientific Research world has witnessed the emergence of a new kind of organisation that is providing a fundamental service to the community: field research stations in remote wildlife locations.

While field research stations are not new, the way in which they are starting to approach the marketplace, definitely is. These organisations have appeared throughout the six continents, providing scientific organisations, educational centres, and individual scientists with the opportunity to access remote or restricted research sites in exchange for organized fees.

In a time when scientific research is more and more dependant on technology and communications, it becomes increasingly expensive and inconvenient for researchers to travel to remote areas on their own, carrying with themselves all the equipment necessary for a functional research operation. With an increase in power demands, logistics and communications, isolated, single-manned research projects are becoming a rarity. Research stations offer a much more cost-efficient way to study wildlife in remote destinations, and wherever possible, are the preferred choice for both researchers and donors.

In response to this situation, some of the most used research study areas, and some of the new ones, have started providing not only access to a research area, or to a specific animal or plant species. They are also bundling such offer with logistical support in the form of accommodation facilities, lodging, power, satellite communications, internet access, laboratories, short-term research assistants, etc.

Due to the small number of research stations, and the lack of available information, estimating the size of wildlife research facilities in remote areas is difficult. Attempting to estimate the market size for those focused in the study of great apes in Africa is virtually impossible. What is possible, however, is to identify competitors and establish a comparison between them in terms of rates and services offered to researchers.

3.2. The Wildlife Tourism Market

According to the World Trade Organisation (WTO), the tourism market is the largest element of the world economy, with slightly above one billion travellers worldwide expected in the year 2010, which will represent US\$569 billion⁴. Africa's share in the tourism trade is still small in proportion, with only 47 million travellers expected in 2010, which will represent approximately US\$27 billion according to WTO.

The most accepted sources estimate that nature-based tourism accounts for approximately 7% of travel today. These same sources estimate that this segment of tourism is growing at a much faster pace (above 10%p.a. as opposed to 4%p.a. for normal travel). Using these estimates, the overall expected economic volume of nature-based tourism in Africa for 2010 has been estimated by Conservation Capital⁵ at a minimum of US\$4.8 billion. While most of the volume will go to those countries with sufficient infrastructure to accommodate increased tourist arrivals and with most powerful marketing capabilities, there is substantial opportunity for those remote and unexplored destinations which take advantage of an ever-expanding market.

Finally, there has been an emerging sector in the travel industry in general: operators offering wilder, ever increasingly remote destinations. These operators appeal to a sector of the market that is very well travelled and knowledgeable. These tourists have extensive experience visiting wilderness areas. They crave, however, to reach those corners of the world where 'nobody' (i.e. other members of their social circles) ever go. These tourists are happy to endure hardships. They will trek long hours in the heat of the day, sleep on the ground under mosquito nets, eat poorly cooked food, and venture into remote areas where emergency medical rescue is days away, if at all possible. They enjoy such exclusive experiences that set them apart from the majority of their society, the contact with environments and peoples far removed from their daily existence.

While this segment represents a very small percentage of the overall tourism market, its absolute numbers are growing faster than the rest of the industry. A series of specialist travel outfitters have appeared in the marketplace during the last decade, catering to adventure seeking travellers who will pay to trek all the way to the base-camps of the most challenging mountains, such K2 or Everest; go on a wild-water rafting expedition in Siberia; or ride a motorcycle across the Sahara desert. With the advent of specialist products for the fit, adventurous tourist, an opportunity emerges for areas like Lomako to derive potential income from non-scientist visitors.

⁴ *WTO's *Tourism 2020 Vision* and World Trade Org & World Touriim Org estimates from www.wto.org, compiled by Conservation Capital

⁵ Conservaton Capital, *Conservation Tourism Market Estimates*, 2005

4. THE COMPETITION

The Lomako Reserve is in a relatively unique competitive situation, as the main wildlife species present in the reserve, Bonobo (*Pan paniscus*), can be found only in the Democratic Republic of Congo (DRC) and not visited easily.

The focus of this section is two-fold. Firstly, it looks at the main general substitute products and services available in the market. This shall serve as a benchmark for both the research-based tourism market and the wildlife tourism market based on great-apes. Secondly, it looks at more specifically at Bonobo-based (and chimp based) opportunities as they are the most immediate substitutes, and the main reserves where these animals exist constitute an oligopoly (i.e. a limited numbers of suppliers control the total supply of one good or service in the marketplace). This is even more relevant when referring specifically to Bonobo (*Pan paniscus*) given their limited distribution and lack of tourism facilities focused on the species.

4.1. Scientific Field Research Accommodation and Facilities

The number of research stations worldwide seems to be expanding. Most of these research stations are linked to one or more overseas organizations, which often provide not only the initial funding, but also a consistent supply of clients for their services in the form of undergraduate, graduate or post-degree researchers.

Despite the large amounts of interest that Chimps and Bonobos generate within the scientific community, access to these species remains fairly limited to researchers. There are currently only a handful of research stations where scientists can study these species. Furthermore, in the majority of these research stations there is a requirement for scientists to be affiliated with the supporting academic institution that sponsors the station. This is the case for Lui Kota (next to Salonga National Park, DRC) affiliated with the Max Plank Institute in Germany, etc. Such requirements limit considerably the scope of potential visitors to the research site, as many potential candidates are already affiliated with other institutions.

Table 1: Comparative Research Study Centres

DRC - Scientific Tourism

Bednight Rate Comparison

| Centre | Country | Short Term (daily fee) | | | | Long Term (daily fee) | | | | Comments | Website |
|---|------------------------|------------------------|----------------|----------------|----------------|-----------------------|----------------|----------------|----------------|---|---|
| | | International | | Domestic | | International | | Domestic | | | |
| | | Sr. Researcher | Jr. Researcher | Sr. Researcher | Jr. Researcher | Sr. Researcher | Jr. Researcher | Sr. Researcher | Jr. Researcher | | |
| Mpala Research Centre (top accommod.) | Kenya | \$37 | \$29 | \$30 | \$20 | \$33 | \$27 | \$26 | \$17 | Fees inclusive of internet, food, laundry | http://www.mpala.org/ |
| Mpala Research Centre (cheapest accomm.) | Kenya | \$32 | \$24 | \$25 | \$19 | \$24 | \$24 | \$24 | \$20 | Fees inclusive of internet, food, laundry | |
| Way Canguk | Indonesia (Sumatra) | \$10 | \$10 | \$10 | \$10 | \$10 | \$10 | \$10 | \$10 | | |
| Danum Valley (top accommodation) | Malaysia | \$73 | \$90 | \$51 | \$51 | \$57 | \$57 | \$51 | \$51 | Excludes vehicle hire, use of research assistant, etc. | http://www.searpp.org |
| Danum Valley (cheapest accomm.) | Malaysia | \$26 | \$27 | \$10 | \$10 | \$17 | \$17 | \$10 | \$10 | Excludes vehicle hire, use of research assistant, etc. | http://www.searpp.org |
| OTS-La Selva | Costa Rica | \$55 | \$55 | \$55 | \$55 | \$55 | \$55 | \$55 | \$55 | | http://www.ots.ac.cr |
| OTS-Las Cruces | Costa Rica | \$55 | \$55 | \$55 | \$55 | \$55 | \$55 | \$55 | \$55 | | http://www.ots.ac.cr |
| OTS-Palo Verde | Costa Rica | \$55 | \$55 | \$55 | \$55 | \$55 | \$55 | \$55 | \$55 | | http://www.ots.ac.cr |
| Rocky Mountain Biological Laboratory | US | \$63 | \$63 | \$63 | \$63 | \$54 | \$54 | \$54 | \$54 | | http://www.rmbl.org/home/index.php?module |
| Smithonian Tropical Research Institute | Panama (10 facilities) | \$120 | \$120 | \$31 | \$31 | \$22 | \$16 | \$15 | \$15 | | www.stri.org |
| UWA-Kidepo, Murchinson Falls, Queen Elizabeth | Uganda | N/A | N/A | N/A | N/A | \$4 | \$1 | \$1 | \$0 | Excludes accommodation, vehicles, and food | http://www.uwa.or.ug/research.html#7 |
| ICTE-Ranomafana | Madagascar | \$40 | \$30 | \$7 | \$6 | \$35 | \$27 | \$7 | \$6 | Covers park fees, tent-site, fullboard, electricity. Excludes internet, research assistants, vehicles | http://icte.bio.sunysb.edu/pages/project_budgets_costs.html |
| BCFS-Budongo | Uganda | \$35 | \$35 | \$0 | \$0 | \$35 | \$35 | \$0 | \$0 | Chimp research site. Includes accomm. fees, access to museum, lab (w freezer, oven, etc.), library & food | www.budongo.org |
| | | | | | | | | | | | |
| AVERAGE | | \$80 | \$80 | \$32 | \$31 | \$30 | \$26 | \$23 | \$22 | | |

4.2. Great Ape Wildlife Tourism

Tourism packages focused on Great Apes have experienced an exponential growth in the last decades. The numbers of travellers who are willing to pay large amounts of money in order to spend some time watching the most charismatic primates in the wild is ever increasing. From Lowland gorillas (*Gorilla gorilla*) in Cameroon, to Highland gorillas (*Gorilla beringei*) in Rwanda, or Chimpanzees (*Pan troglodytes*) in Tanzania or Uganda, tens of thousands of eager visitors pay large sums for the privilege of seeing these animals in their media.

The tourism industry around the African great apes has evolved substantially. A number of high-end facilities have emerged to accommodate those who, together with the wildlife experience, seek a luxurious accommodation during their holiday. Good examples of such facilities are Greystoke Mahale in Tanzania, or Sabinyo Silverback Lodge in Rwanda.

Simultaneously, the rest of the value chain has adapted to the increasing demand for great ape tourism. A number of specialist safari operators now offer trips focused entirely on great apes. Other luxury safari operators offer extensions to more conventional savannah safaris, so their guests can spend three or four days in the deep forests witnessing the life of great apes. Operators such as World Primate Safaris (www.worldprimatesafaris.com) or Discovery Initiatives (www.discoveryinitiatives.com) are a good example of those focusing entire trips around the great apes. The major safari operators such as Abercrombie & Kent (www.abercrombiekent.com) or Ker & Downey Safaris (www.kerdowney.com) offer trip extensions to any of the major parks where one can see the great apes.

While some of the most successful and accessible destinations have integrated luxury lodges adjacent to the parks in which the great apes live (e.g. Mahale or Sabinyo), others are still offering mainly basic accommodation in tents.

After several interviews with tour operators who take tourists to see great apes, it has become clear that the most relevant success driver of a trip is not the level of luxury, but the chances of seeing the great apes⁶. Chimps, for instance, are very moveable and therefore a sighting is not guaranteed. Travellers to Mahale must trek for hours and often miss the chimpanzee troop which can be as far as several kilometres into the forest from the tourists. In that sense, Lomako stands a unique competitive advantage, as the Bonobo group in the area is highly habituated to human presence, and with the help of an efficient team of game-scouts, sightings are virtually guaranteed.

Comparatively with other safari companies, operators who provide wildlife safari packages involving great apes tend to serve segments on the high-end of the market. Access to the rarer species (e.g. Mountain gorillas) is very limited, and visitors must be prepared to pay a substantial premium for the privilege.

Interestingly, no other base for Bonobo-based tourism site is currently available, mainly due to the political instability associated with DRC and inherent risks to travellers in the country. The entire geographical range for this species falls within the DRC. This could allow Lomako to turn itself into the leading destination for Bonobo based tourism. The competitive advantages of being a first-mover and establishing a solid brand in the marketplace are significant.

⁶ Interviews with Ker & Downey guides and with Managing Director of World Primate Safaris, 2008

5. MARKETING PLAN – MAIN ELEMENTS

5.1. The Product

5.1.1. Common Product Attributes

From a product perspective, Lomako stands in a privileged position for both, Scientific Based tourism and general Wildlife Tourism. Unfortunately, the political instability of DRC, combined with the remoteness of Lomako pose a challenge in order to market the reserve.

5.1.1.1. Climate

Lomako's climate is benign, with hot to moderate temperatures. Rainfall is abundant, and occurs throughout most of the year. There are two 'dry' seasons, when rain is scarcer.

5.1.1.2. Physical Environment

The most remarkable characteristic of Lomako reserve is its physical integrity. The forest's vegetation cover remains virtually untouched, and the rivers are free of pollution and filled with life. Its aesthetic value is unquestionable, and constitutes one of the greatest strengths of the reserve as a tourist destination.

Biodiversity levels in the reserve are as large as one could expect to find in rainforests in equatorial Africa: virtually unmatched elsewhere. The presence of Bonobos, whose geographical range is limited to the Congo river basin and is all enclosed within the DRC guarantees the uniqueness of the wildlife product offered in Lomako.

The reserve offers remarkable opportunity in terms of educational and research potential. This will be mostly linked to Bonobos, but also to the ecology of rain forests in tropical zones. The greatest potential shortcoming of Lomako as a product at this stage is the fact that it is virtually unknown outside of specialist circles.

5.1.1.3. Biodiversity

Biodiversity levels in the Lomako reserve are of substantial value. The variety of fauna and flora to be found within the area is substantial, and the size of the reserve is sufficient to grant the necessary habitat for its larger species.

Again, the charismatic Bonobo (*Pan paniscus*) is a species that by itself could attract large numbers of tourists and researchers. The pristine state of the forest guarantees a wilderness experience up to the highest standards.

More importantly the main attraction of the reserve, the Bonobos, have been object of field research for several years thus becoming thoroughly habituated to human presence virtually guarantees sightings of the animals. This is one of the greatest appeals in comparison with others species (e.g. Chimps) which are often nowhere to be found by tourists visiting their habitat.

Local communities who have lived in harmony with the environment for many generations constitute an additional asset to the reserve. The symbiotic relationship in which a delicate balance between natural resource utilization and sustaining the livelihoods of the communities will provide with educational and cultural aspects highly valued in the tourism industry.

During the last three years, AWF has been monitoring large mammal populations and human activities throughout the RFLY. Results of last year show a sharp increase in traces of both Bonobos and forest elephants recorded in the RFLY as a decrease in traces of human hunting activities (see Belembo, 2008).

5.1.1.4. Complimentary Third Party Products

This is probably one of the greatest challenges that must be met in order to develop a strong tourism product in Lomako. The DRC does not provide much opportunity in terms of either scientific based tourism or specialist wildlife tourism. At present Lomako is very likely to be an almost 'stand alone' attraction for visitors to DRC.

There are, however, certain products in offer which could perfectly compliment the Lomako product in the market place. One example, GoCongo (www.gocongo.com) offers river cruises for adventurous travellers which could easily include several-day stops at Lomako to do Bonobo tourism. While the number of operators in DRC is almost negligible, there is a chance more of them will appear in the near future.

Also, at this moment, AWF is supporting the "Amis des Bonobos au Congo" (ABC) in its efforts to release bonobo orphans in proximity to Basankusu.

5.1.1.5. Operational Aspects

Access to water is guaranteed year-round, and water is abundant. So are most construction materials.

Travel in and out of the reserve poses the greatest challenge for the success of Lomako as a tourist destination. Transport is complicated, unreliable and expensive. Today, only one company serves the flights between Kinshasa and Basankusu (800USD round trip), once a week, if at all. Tourists and scientists must expect to spend several days en-route between Basankusu and the Lomako Forest (after formalities in Basankusu, one need a 24hr non-stop canoe trip to reach Ndele. The only way to overcome this challenge, more so when dealing with wildlife tourism clients, is to turn the trip into part of the product/experience. The one day trip by canoe into the reserve can be very impressive, helping tourists grasp the degree of true and remote wilderness Lomako lies onto. The canoe experience has been described by previous visitors to the reserve as one of the highlights of their trip. Marketing will be fundamental to leverage that experience.

Logistic difficulties linked to the reserve's remoteness and the limited access to goods and services throughout the country turn operation of tourism facilities in the DRC into a challenging and expensive endeavour. Lack of access to packaged goods will generate the need to transport them by canoe into the reserve. Again, while operational complexities pose a challenge and increase costs, efforts will be made to ensure that local produce is sourced where possible.

5.1.2. Scientific Field Research Accommodation and Facilities

The comparative analysis in section 4.1 above provides a good indication of pricing and attributes common to research facilities in nature destinations, as well as those which cater to great ape researchers.

The remote location of Lomako, in combination with the low levels of infrastructure and human development in the area limit substantially the level of accommodation facilities and services that can be provided to researchers in the area. Lomako will offer, however, much more than individual scientists could provide for themselves at affordable or feasible rates:

- Access to study area and animals – not easy to obtain in DRC for individuals researchers or institutions without presence or affiliation in the area.
- Accommodation – in traditionally built huts which will have electric lights and lavatory and shower. The accommodation will also be serviced and cleaned. Alternatively, when the huts are fully booked, researchers will have access to a campsite which will allow use of same services.

- Food & drinks – the reserve will provide with daily meals and basic drinks (e.g. drinking water, juices, milk, coffee, etc). For researchers, alcoholic drinks will not be included in the daily rate. If possible they will be sold to them by the tourist camp.
- Internet access via VSAT – Internet access will be provided to researchers. At least for several hours per day. This will be included in the daily fee.
- Communication (satellite phone) – While researchers will have to pay for use of satellite phone. This device shall provide them with a direct contact with the rest of the world at any time. This is especially important in case of emergencies, medical or otherwise.
- Security – The body of game scouts present in the reserve, the research station and the tourist camp will provide with security to researchers. The area is patrolled against poaching, which in turn prevents any potential risks linked to banditry. (At this moment, banditry is actually not existing in the area).
- Research assistance – There are trained guides who are very familiar with the area and with the animals in the reserve. They can be hired by researchers to provide assistance with tracking, sample collection, etc.
- Transport – The reserve will own and operate several boats with outboard engines which will travel regularly in and out of the reserve, either to transport people or goods and supplies. This provides researchers with an opportunity to book a trip at a lower cost than if they had to travel on their own. A round trip requires 600L of fuel. Fuel prices depend on offer and reach regularly \$4USD/L.

All these services, combined with the fact that a number of researchers will establish in the reserve, therefore creating a critical mass (if small), should contribute to Lomako becoming a reference point for wildlife research in DRC.

5.1.3. *Bonobo Wildlife Tourism*

The key product attributes that define the wildlife tourism experience that will be offered in Lomako are:

- **Exclusive**
 - There are no other tourist destinations where one can witness and interact with wild Bonobos.
 - Groups will interact with Bonobos one (group) at a time, and for several days. This is much more than most great ape tourism products offer today
 - Camps will be used exclusively as well. Only one group of tourists at a time. They will have access to on-site scientists. The ideal maximum capacity is 6 people.
 - Low number of tourists will have the privilege to visit Lomako.
- **Active**
 - Tourism in Lomako will demand a certain degree of fitness and an adventurous spirit
 - Long walks through thick forest will be the norm, which can be physically demanding
 - All aspects of a visit to Lomako will challenge people's expectations of comfort levels. The tourist's mind will also be challenged by the extreme remoteness from large human-settlements.
 - The long canoe trip along the river will provide with an 'explorer's' experience to the tourist.
- **Low-impact**
 - Tourism in Lomako will be based on a principle of minimizing the human footprint in the environment
 - Structures will be built following traditional methods, and the use of fuel and other materials limited where possible
 - Interactions with wildlife will attempt to minimize disruption of natural activity amongst the animals

- **Educational**

- Tourists will be exposed to the ongoing scientific work taking place in the reserve
- Efforts will be made to ensure that tourists are educated in the main topics relating to the reserve
 - Bonobo conservation
 - Ecosystem dynamics and conservation
 - Community development
 - Threats to the reserve (poaching, deforestation, etc.)

5.2. Pricing

5.2.1. Scientific Field Research Accommodation and Facilities

Pricing for such a unique area is difficult, as the validity of comparable pricing is quite limited. Given the fact that the only alternative site to study Bonobos in the DRC is linked to an academic institution, and that researchers must be linked to that institution in order to visit the site, one could argue that Lomako has a virtual monopoly in the Bonobo study outside of that academic institution.

Several aspects, however, demand that pricing for researchers be contained to match those of relatively similar research stations in wildlife areas:

- Externalities of research work
 - Research done on specific area contributes in large degree to the visibility of that specific area, not only in the scientific world, but also as a wildlife haven, which can in turn be leveraged for tourism purposes.
 - Research will very likely produce valuable information relating to the conservation of threatened species in the reserve, ecosystem management, sociological changes amongst local communities, etc. All very valuable to the reserve management in long term strategic planning and decision making.
- Limited funding available to wildlife research projects
 - Research projects normally struggle with funding. While their price elasticity is relatively low, projects often have to fold-up entirely due to lack of funding.
 - While the reserve wants to maintain low numbers of researchers, discrimination by price is only recommended once demand reaches a critical mass. At this stage, factors outside of Lomako's control, such as insecurity in DRC or lack of infrastructure are sufficient deterrents to not need to limit demand by price.
 - Pricing at abnormal rates, will also attract potential competitors, which would in turn erode the potential development of Lomako.

Pricing has thus been determined by comparison to similar facilities. The underlying assumption is that other aspects linked to research in Lomako will significantly increase the expenses associated with conducting research in Lomako. Probably, the most important of which is transport to and from the reserve.

Lomako - Scientific Tourism

Bednight Rates

| Short Term (daily fee) | | | | Long Term (daily fee) | | | | Comments |
|------------------------|----------------|----------------|----------------|-----------------------|----------------|----------------|----------------|--|
| International | | Domestic | | International | | Domestic | | |
| Sr. Researcher | Jr. Researcher | Sr. Researcher | Jr. Researcher | Sr. Researcher | Jr. Researcher | Sr. Researcher | Jr. Researcher | |
| \$50 | \$50 | \$0 | \$0 | \$35 | \$35 | \$0 | \$0 | Short term researchers are those staying less than 1 month |

This price does include the elements listed above. It does not include transport to and from the reserve, which would be charged separately.

In addition, researchers will pay a Park Fee of US\$10 per person per day. This income will be distributed as per agreement with ICCN.

5.2.2. Bonobo Wildlife Tourism

While there are very successful tourism operations linked to other great apes such as Mountain Gorilla, Lowland Gorilla, Chimpanzee in Africa. The pricing for trips to view each of those species vary substantially. The main cause of disparity is determined by the rarity of the animals. Mountain Gorilla, for example, command extremely high 'conservation fees'. Tourists pay up to 500USD for the privilege to spend one hour witnessing these remarkable animals. Given their critically endangered state, the fact that they are highly habituated to tourists, and their very limited available habitat, tourists are almost guaranteed to see these animals on each visit. On the other hand, Chimpanzees are much more common, and there seems to be a market expectation for lower conservancy fees. Certain study areas, however, are considering a significant increase in conservancy fees linked to Chimps (e.g. Mahale project).

Table 2: Comparative Park Fees for Major Primate Destinations. SOURCE: World Primate Safaris

| Park | Country | Species | Park Fee (pppd) | Comments |
|--------------------|----------------|------------|-----------------|--|
| Bwindi NP | Uganda | Gorilla | \$500 | includes, 24hrs park fees, NP guides but viewing strictly limited to 1 hour – min age 15yrs old |
| Volcanoes NP (PNV) | Rwanda | Gorilla | \$500 | |
| Nouabale Ndoki NP | Congo Republic | Gorilla | \$156 | (100EUR) |
| Mahale NP | Tanzania | Chimpanzee | \$80 | park fees include tracking the chimpanzees but viewing strictly limited to 1 hour – min age 16yrs old). TANAPA have been talking about introducing a fee of \$150 pp/day to track the chimps and even limiting this to 1 permit per person during their stay at Mahale |
| Gombe NP | Tanzania | Chimpanzee | \$100 | |
| Kibale NP | Uganda | Chimpanzee | \$70 | plus park fees \$15 for 2 nights |
| Kyambura Gorge | Uganda | Chimpanzee | \$30 | (plus park fees \$50 for 3+ nights) The \$30 fee is for a 'Primate Walk'. There is a group of habituated chimps in the Gorge and these are regularly seen but not as reliable as Kibale. |
| Queen Elizabeth NP | Uganda | Chimpanzee | \$30 | |
| Average Gorillas | | | \$385 | |
| Average Chimps | | | \$62 | |
| Average (both) | | | \$183 | |

On the other hand, accommodation seems to follow similar trends as the safari industry. Luxury lodges, especially those managed by stronger brands, charge fees which are similar to those of luxury lodges in savannah safari lodges. This is the case of lodges like Gresystoke in Mahale or Sabinyo Silverback in Volcanoes NP.

Table 3: Comparative Rack Rates for Lodges in Major Primate Destinations. SOURCE: World Primate Safaris

| Lodge | Park | Country | Species | Rack Rate(pppd) |
|------------------------------|--------------------|----------|------------|-----------------|
| Bwindi Lodge | Bwindi NP | Uganda | Gorilla | \$325 |
| Buhoma Lodge | Bwindi NP | Uganda | Gorilla | \$280 |
| Mount Gahinga Lodge | Bwindi NP | Uganda | Gorilla | \$300 |
| Sabyinyo Silverback Lodge | Volcanoes NP (PNV) | Rwanda | Gorilla | \$645 |
| Virunga Lodge | Volcanoes NP (PNV) | Rwanda | Gorilla | \$500 |
| Greystoke | Mahale NP | Tanzania | Chimpanzee | \$750 |
| Nkungwe Lodge | Mahale NP | Tanzania | Chimpanzee | \$535 |
| Ngamba Island Camp | | Uganda | Chimpanzee | \$180 |
| Primate Lodge (tentied camp) | Kibale NP | Uganda | Chimpanzee | \$290 |
| Average (gorilla) | | | | \$410 |
| Average (chimps) | | | | \$439 |
| Average (all) | | | | \$423 |

Additional costs for tourists are several. Vehicle costs vary considerably by country, although in general they range from \$250-\$300 per day including the driver/guide (4x4 Landcruiser or Discovery, etc). Transfers are normally in the region of \$100-\$150 per vehicle (4x4 mini-van), although this does depend on the distance.

Tourists to Lomako will pay a bednight fee to the tourism enterprise. It is expected that tourists will visit the reserve as part of expeditions organized by Lomako itself, or as clients of third party operators.

Lomako - Bonobo Wildlife Tourism

Bednight Rates

| Lomako Tourists (Direct) | | Third Party Tourists | |
|--------------------------|----------|----------------------|----------|
| Bednight Fee | Park Fee | Bednight Fee | Park Fee |
| \$450 | \$80 | \$220 | \$80 |

In addition, researchers will pay a Park Fee of US\$80 per person per day. This income will be distributed as per agreement with ICCN.

5.3. Distribution – Sales Channel

5.3.1. Scientific Field Research Accommodation and Facilities

There are two main distribution channels for scientific research accommodation:

3. **Academic Partners.** Through links with academic institutions and research centres that have primate research programs, tropical rainforest biology, or research programs from other departments which could benefit from field research in Lomako. Lomako could create, in partnership with such institutions, specific programs with a clear calendar, for undergraduate or graduate students.
4. **Direct.** Attracting mostly post-graduate students and researchers who, while linked with research institutions, have independently decided on an area of study which can be covered in Lomako. Most of the bookings and arrangements for such researchers would be done through email. Information would be distributed through Lomako's website and potentially through quarterly electronic newsletters.

5.3.2. Bonobo Wildlife Tourism

Bonobo Wildlife tourism in Lomako will be sold through two channels:

3. **Direct** – Using Lomako's website as the main vehicle, the reserve will be able to sell trips direct. The initial idea is to limit the number of trips by tourists to the reserve. These trips will be guided by experts and/or researchers, who will ensure that the wildlife experience is superior in terms of educational and conservation value than most potential alternatives offered by tour operators.

The reserve might wish to identify a preferred partner who will handle the back-office part of the trips. That is, flight bookings, insurance, ground handling in Kinshasha, etc.

4. **Agents** – Lomako will partner with a limited number of agents who will offer visits to the reserve. These agents will take care of all the back-office and guiding of tourists throughout their whole trip. Lomako is likely to offer canoe transfers in and out of the reserve for a commercial fee.

Agents will take care of supplies, cooking, and setting up camp in a specially designated campsite. They will bear full responsibility for the quality of services offered in terms of accommodation, cooking, etc.

The reserve will provide with experienced guides who will take tourist groups into the forest in order to find and view the Bonobo families. These guides will ensure that tourists follow guidelines in terms of their behaviour towards the environment in general and the Bonobo in particular.

5.4. Promotion Strategies

Promotion of the **Research Facilities** should be done by publications on the websites of specialist scientific organisations and academic institutions. Electronic mailings should be sent periodically to all potential clients, given that they are relatively easy to identify.

Promotion of **Bonobo Wildlife Tourism** in the reserve in order to develop sufficient brand equity to generate demand will be necessary. It is expected that part of this promotion will be undertaken by those specialist safari operators who sign agreements with Lomako (e.g. potentially World Primate Safaris, GoCongo, Discovery Initiatives, etc.).

An additional push, however, will be necessary. Rather than follow conventional 'push' strategies, which are linked to price promotions, or reaching out to the marketplace, it is recommended that Lomako follows a very strict 'high end pull' strategy.

Such strategy would consist on making the initial safaris into the reserve available only to 'qualifying' groups. Those groups will be surveyed in terms of their real ability to withstand travel into remote and challenging areas. High prices will also act as a determining factor in order to establish Lomako into the very exclusive tourism destinations. Lomako should aim to serve low numbers of high-paying customers. Those who are interested and educated enough in the conservation issues of the reserve, that are willing to pay a significant premium for the privilege to visit.

Collaboration by AWF, and promotion through its website and newsletters could provide invaluable support for the reserve's marketing efforts. Use of conventional media promotion/education methods, such as the production of television documentaries should be attempted, and interest by overseas wildlife production companies should be sought. Any filming contract should ensure, however, that specific mention of the possibility to travel into the reserve is made.

6. FINANCIAL PLAN

6.1. Pro-forma Income Statement

6.2. Pro-forma Balance Sheet