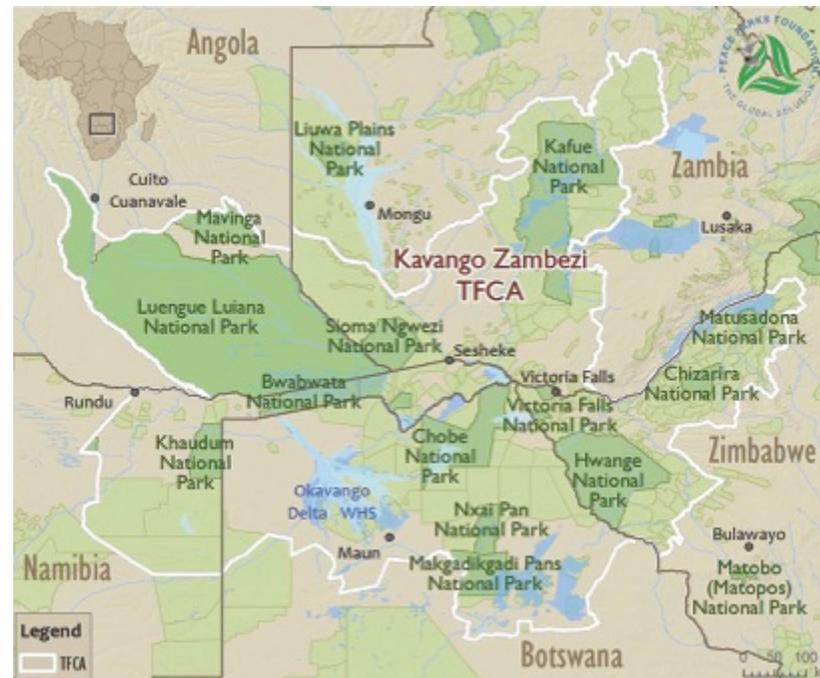
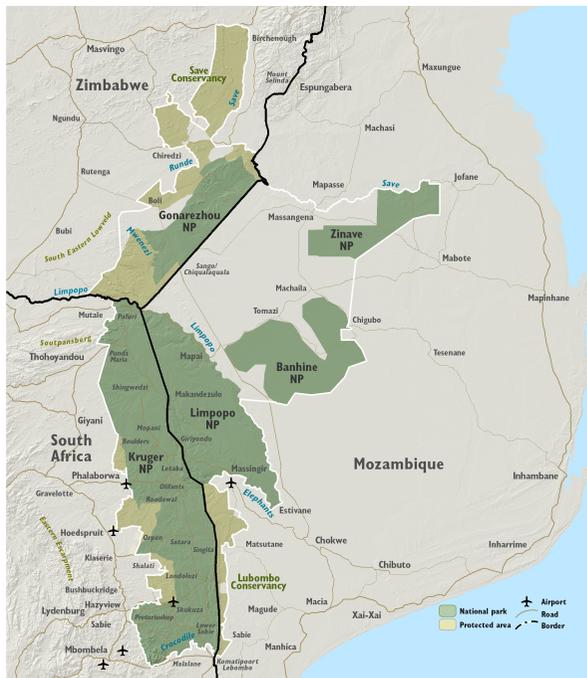


COVID-19 and Impacts on Protected Area Tourism

The Great Limpopo TFCA and the Kavango Zambezi TFCA



Dr Anna Spenceley

TFCA Network Steering Committee webinar on
'Building a resilient tourism sector in SADC TFCAs'

18 August 2020

Overview of survey & responses

Global online survey open from 10 to 24 April 2020:

- Draft analysis circulated for review & comment: 29 responses
- Survey extended to 30 June 2020 & in French

1261 responses & 960 usable responses in total:

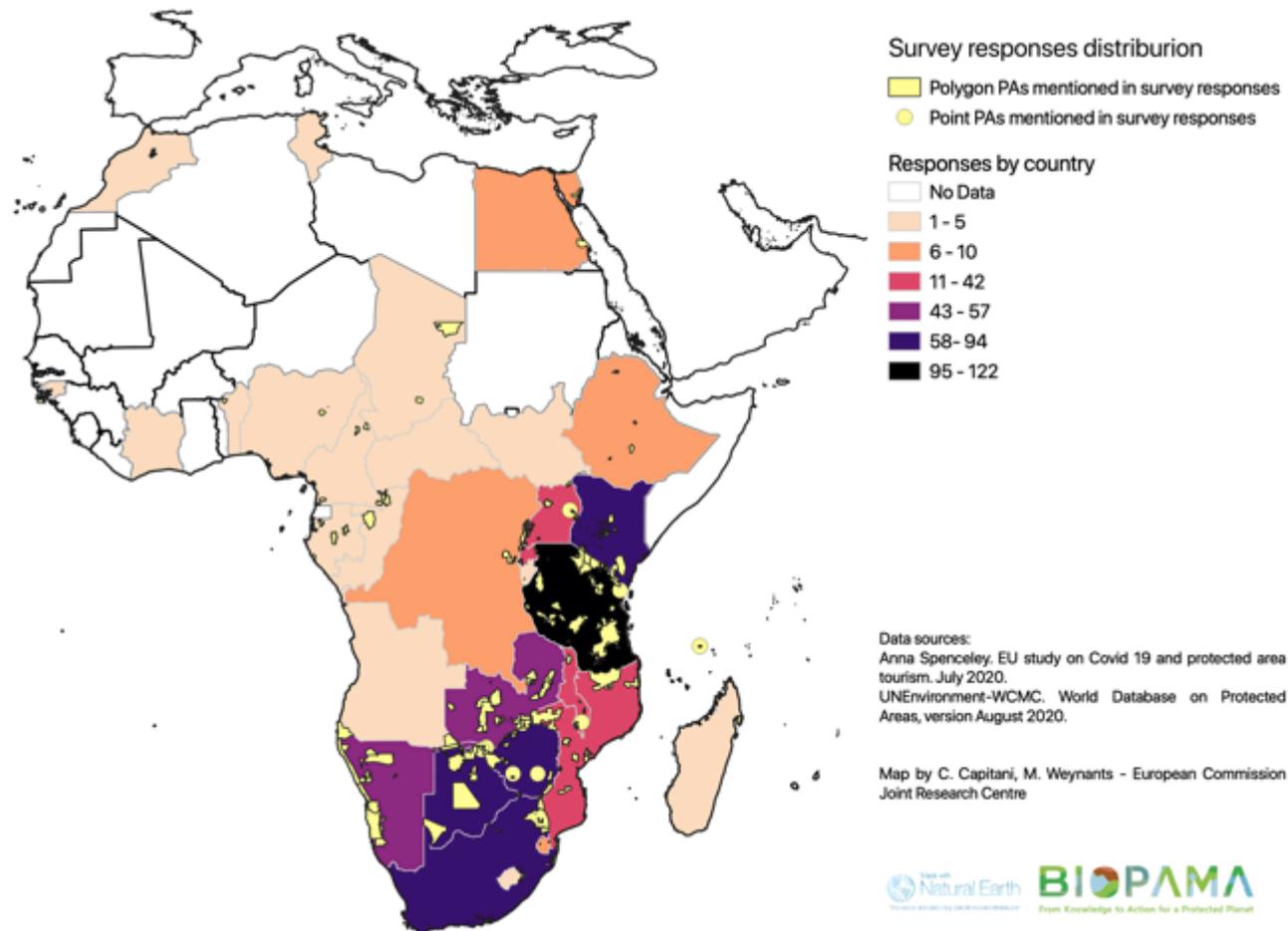
- 107 countries on all continents
- 736 operators working in Africa (some operators on >1 continent)



This study is financed by the European Union, under the GPGC thematic programme on environment.

The study is implemented by the Eurata Consortium. The contents of this publication is the sole responsibility of Eurata Consortium and can in no way be taken to reflect the views of the European Union

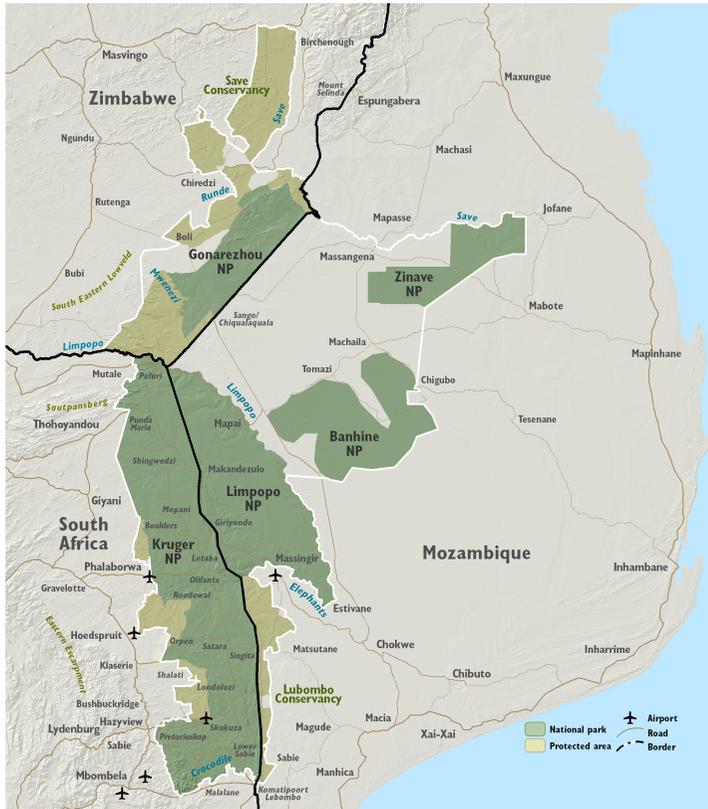
Spotlight on Africa



Most African responses from east and southern Africa

Overview of preliminary Africa results - <https://trade4devnews.enhancedif.org/en/news/covid-19-and-tourism-africas-protected-areas-impacts-and-recovery-needs>

Impacts on respondents operating in the GLTFCA and KAZA TFCA



Understanding the results

1. Contact details

Your name:

Name of tourism enterprise:

Name of protected area(s) of operation:

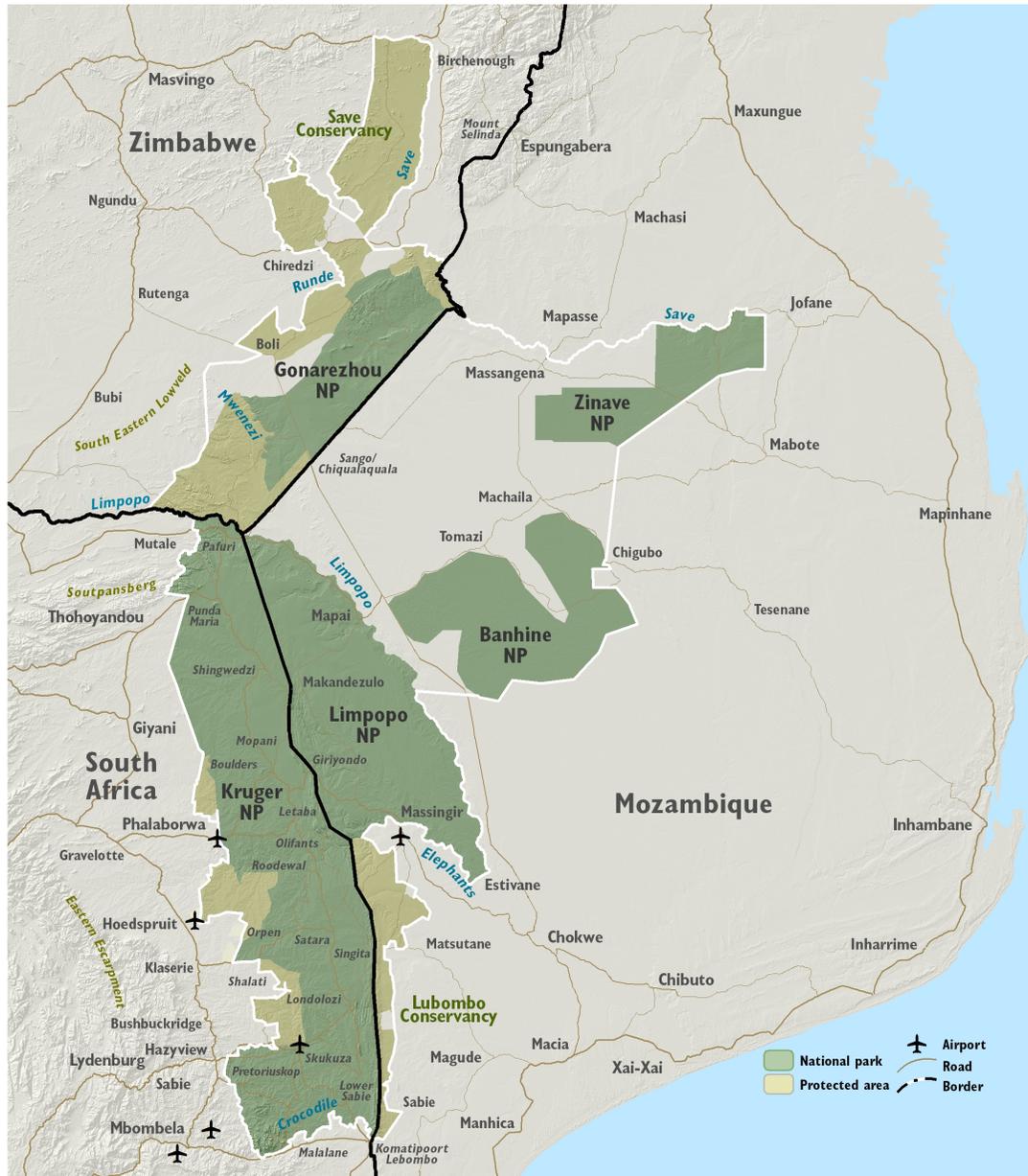
Country(ies) of operation:

Email address:

Some respondents:

- operate in 'multiple' protected areas – so their values/impacts are not necessarily specific to one or other TFCA.
- operate in both GLTFCA and KAZA - so are included in both analyses (37 respondents)

Spotlight on the Great Limpopo TFCA



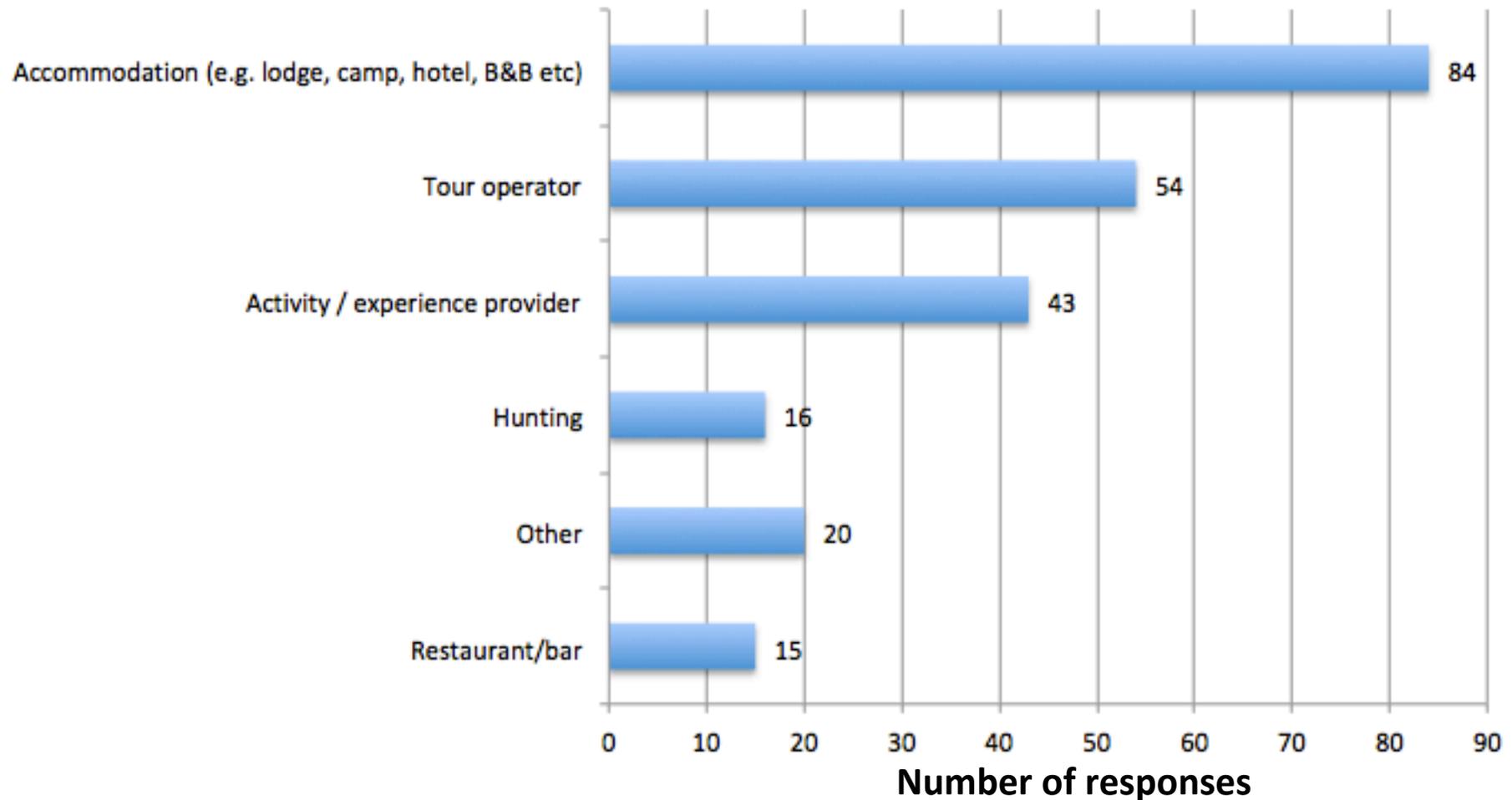
136 responses from operators working in GLTFCA

Countries of operation in GLTFCA:

- Mozambique: 15
- South Africa: 97
- Zimbabwe: 39

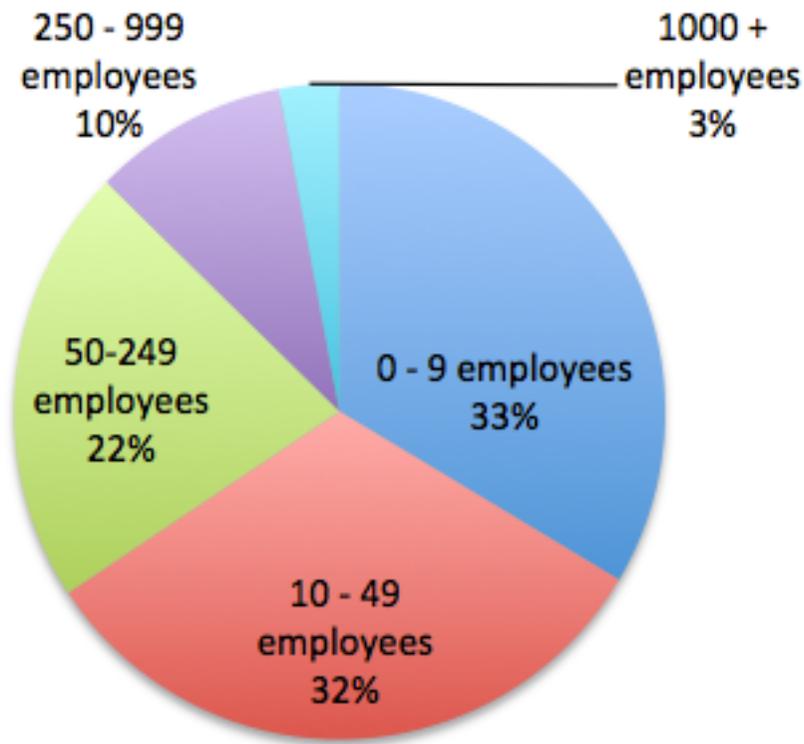
Note: Some respondents operate in more than one country:

Type of product or service offered



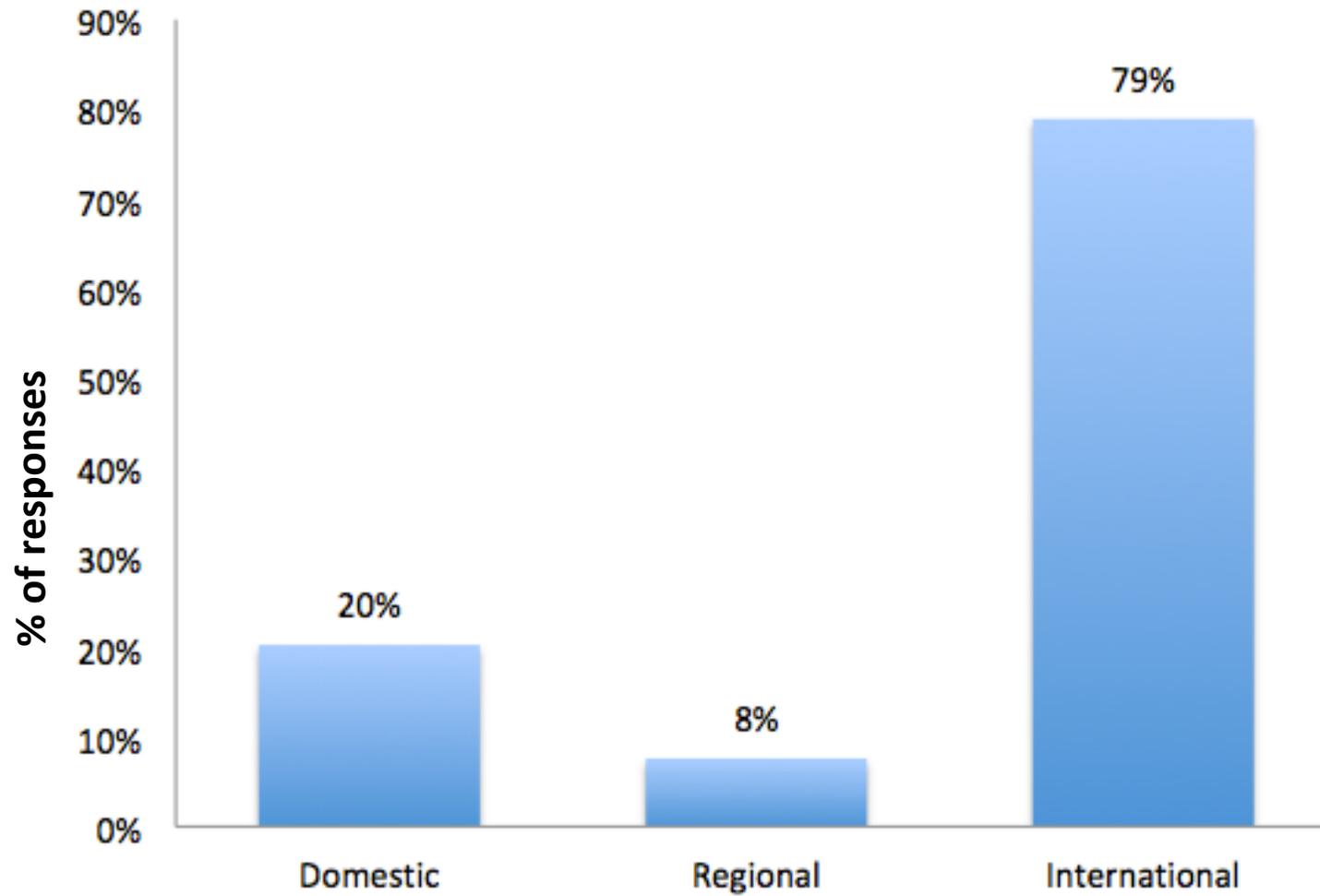
- Number of responses (n) = 136 (Question 2)
- Some respondents offered more than one product/service

Size of business (number of staff)



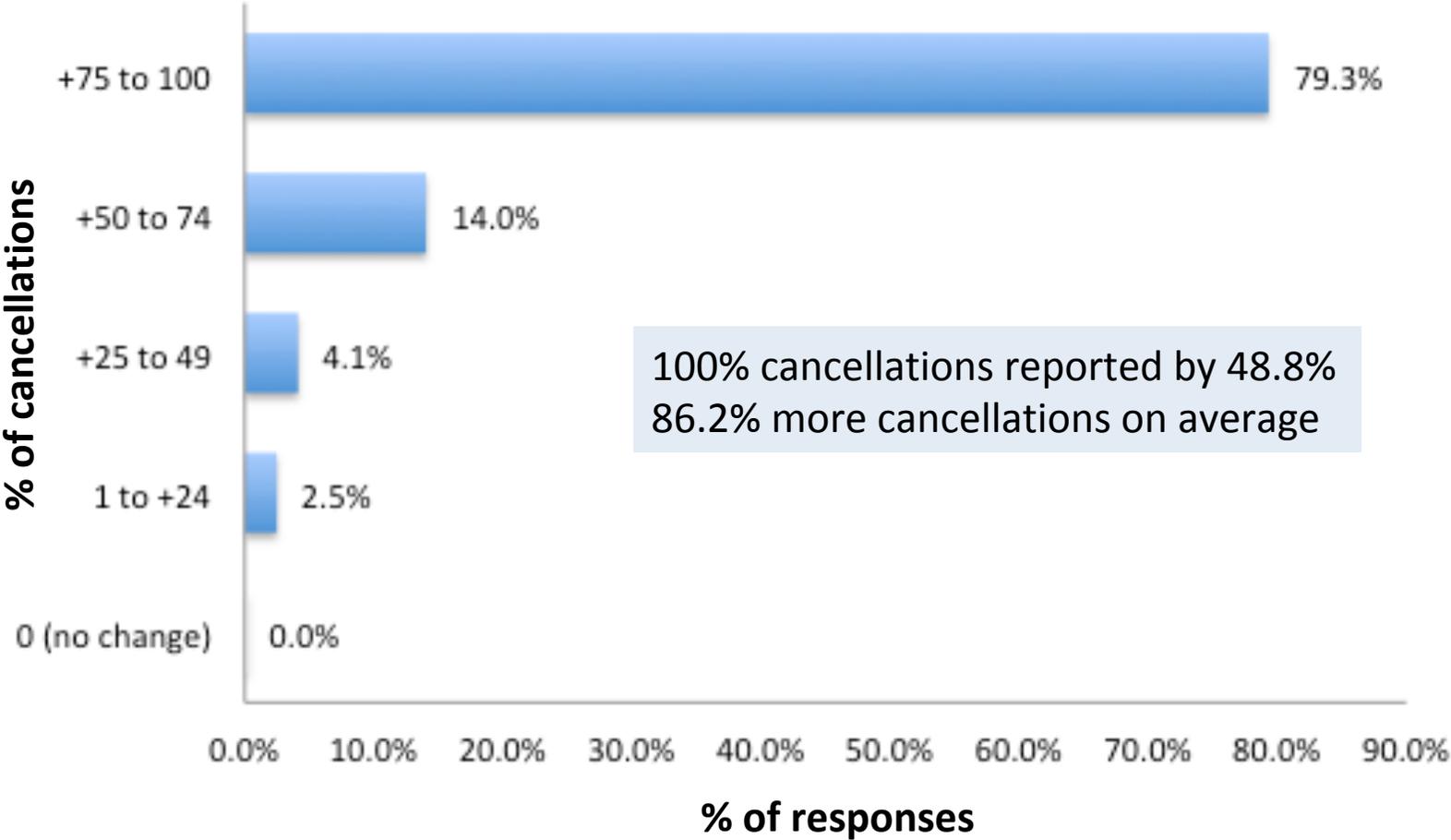
n=134 (Question 4)

Source markets (average %)



n=134 responses (Question 6)

Level of cancellations from March to June 2020

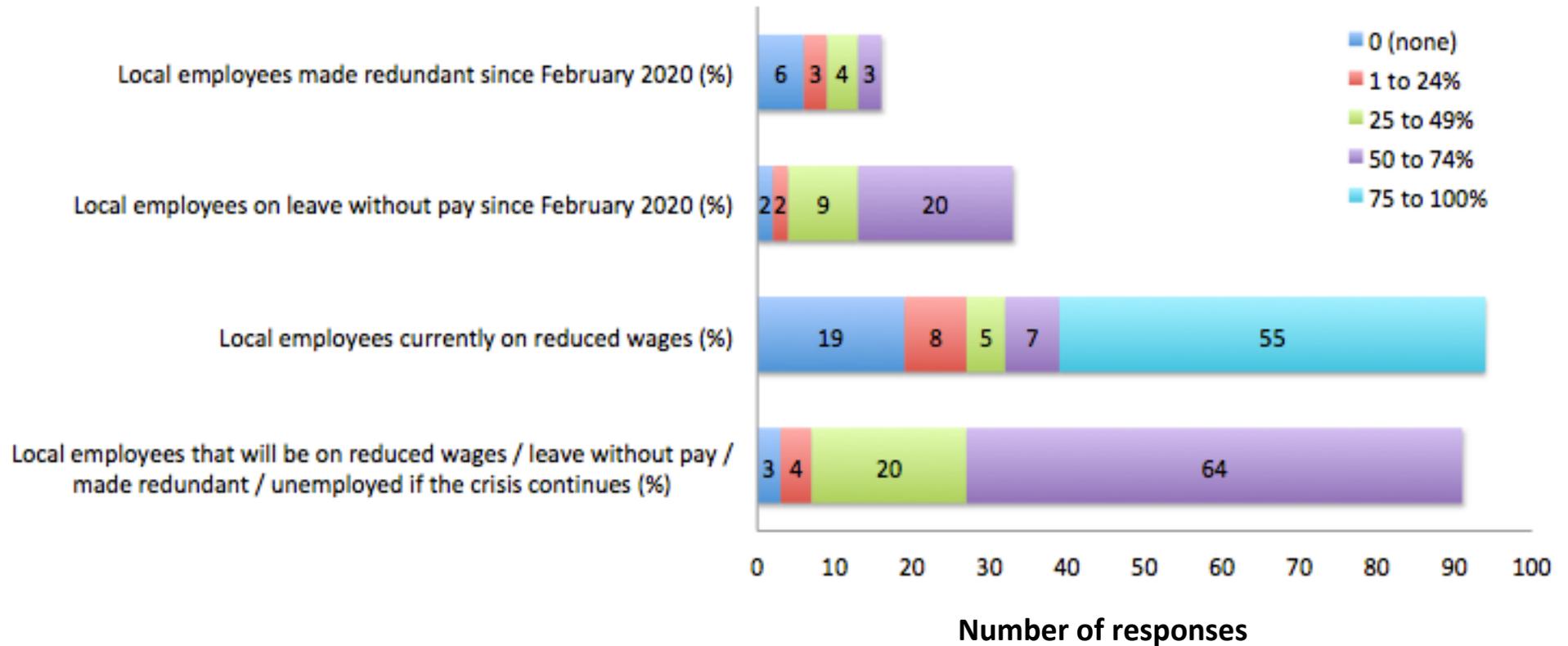


n=121 responses (Question 9)

Sample comments on customers, bookings, cancellations and revenues

Country	Comment
Mozambique	We operated normally until the 12th of March. After that nothing else happened. No tours, no booking for the future and only cancelation of everything schedule onwards.
South Africa	The cancellations change daily as we continue to be shutdown by our government. Reservations that are on the book today and holding out in the hope that borders/flights/tourist attractions will open, may cancel tomorrow once it becomes clear to the guest that the risk is too high to keep the booking in place.
Zimbabwe	We have had 100% booking cancellations from March to June 2020. We have lost revenue of about +/-USD500k We have paid for our national parks annual concession fees , quotas and permits, we continue to pay wages, antipoaching and water management costs for the long term benefit and protecting the wildlife.

Overview of local employment changes

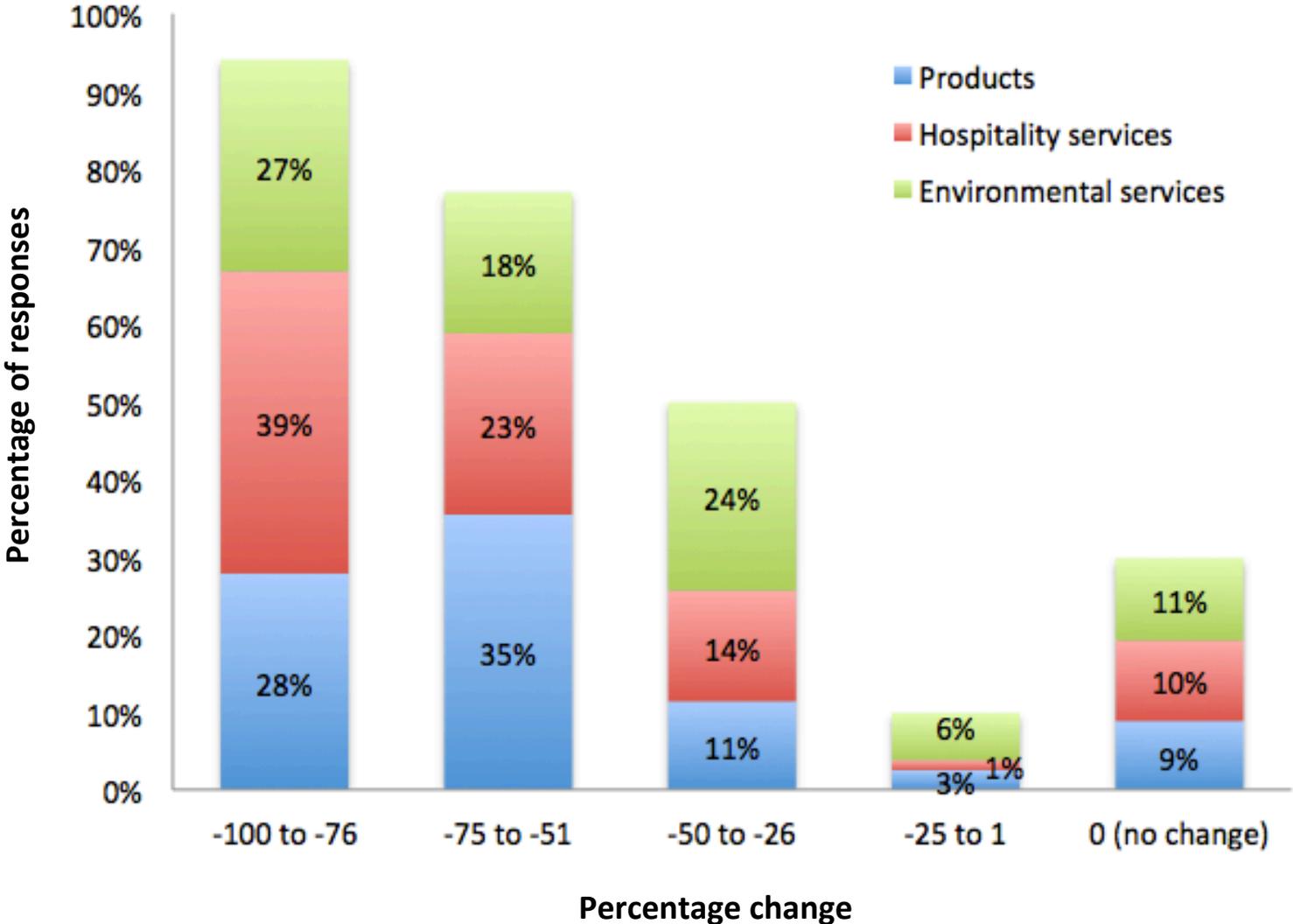


Composite of Questions 13 to 16)

Sample comments on staffing

Country	Comment
Mozambique	We will continue with essential staff (anti-poaching) as long as financially possible.
South Africa	I cannot let any of my staff go as they are like family and most or all of them are the only ones working and their families rely on the money they get.
Zimbabwe	25% of staff were made redundant in March 2020. Of remaining staff, all have taken pay cuts, starting in March 2020. Most are now on 25% of previous salaries.

Likely change in value of local product procurement, hospitality support and environmental services expenditure

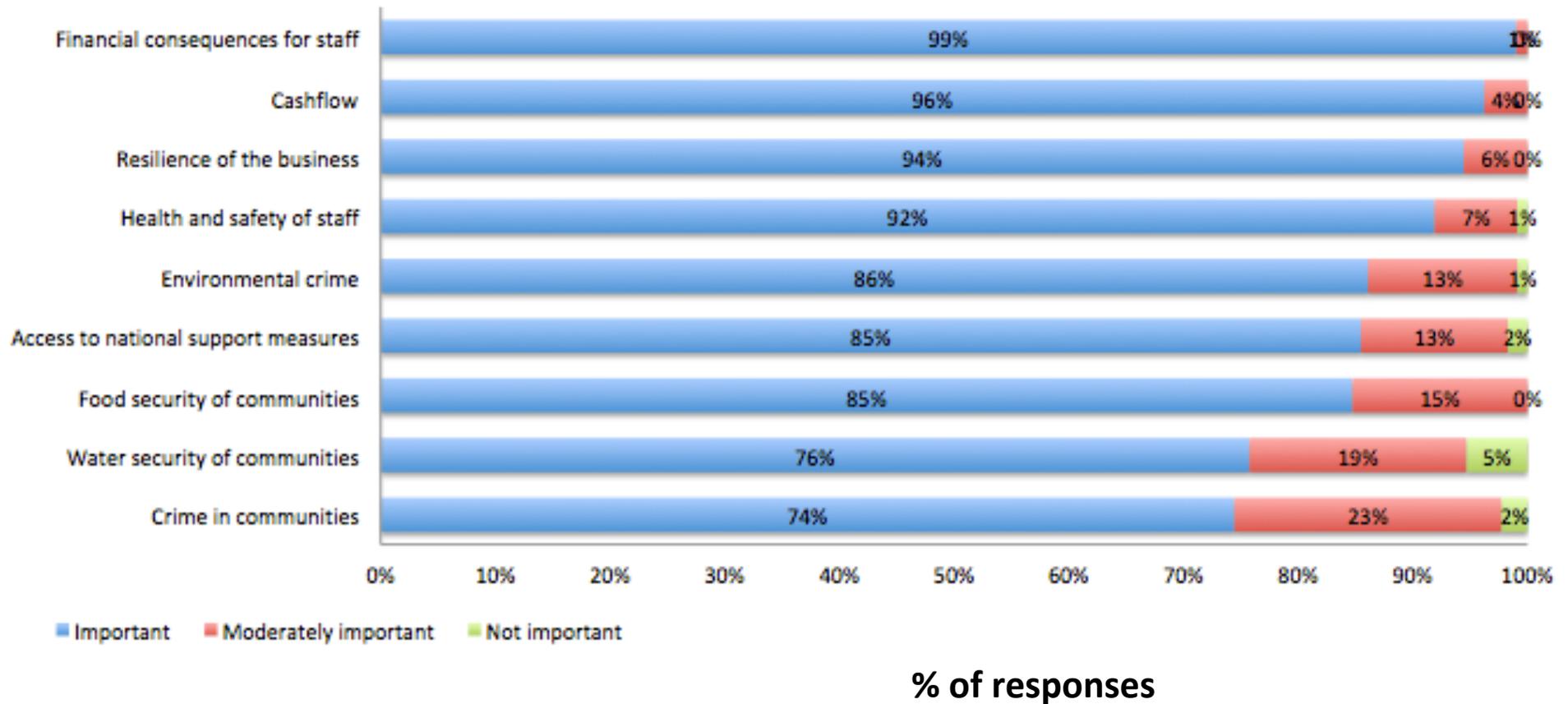


Composite of Questions 19, 21, and 23

Sample comments on local payments

Country	Comment
Mozambique	If this continues we will be unable to make any donations or normal purchases - we will only be able to purchase the most critical products/services.
South Africa	If our guests do not travel then the reserve collects no conservation levies - these levies go directly to the reserve for anti-poaching efforts. Coupled with the massive loss of income to the local community, we are facing a huge probability that poaching will increase 10 fold
Zimbabwe	We have temporarily closed the camp so will not be purchasing supplies for the camp's visitors until it re-opens which is yet to be determined. likely upwards of 90% decline in turnover and payments made to various service providers ie food & beverages, repair and maintenance, fuels & oils, vehicle expenses etc.

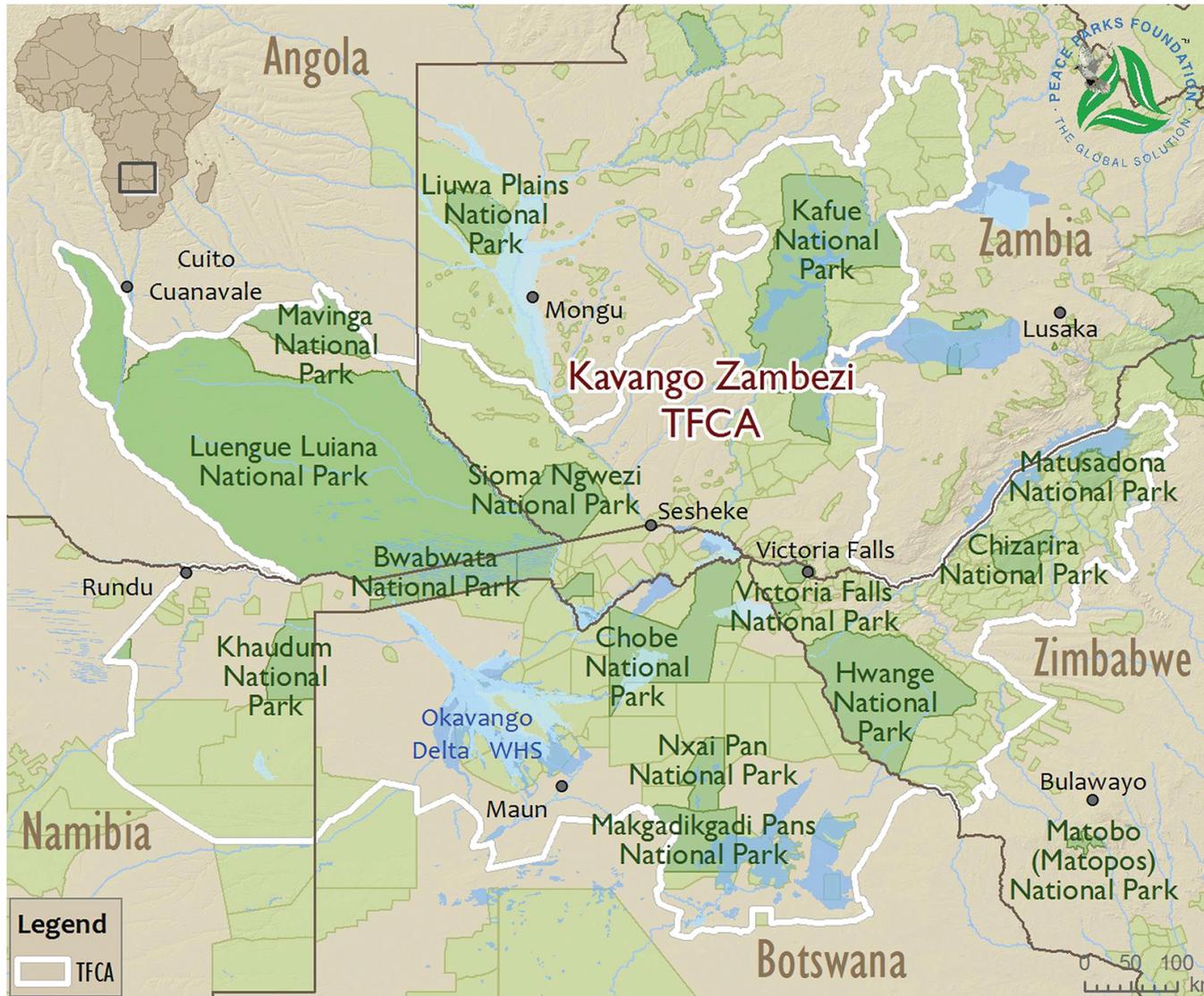
Operator's most immediate concerns



n=103 responses (Question 26)

Percentages are given as a proportion of responses to each option

Spotlight on the Kavango Zambezi TFCA



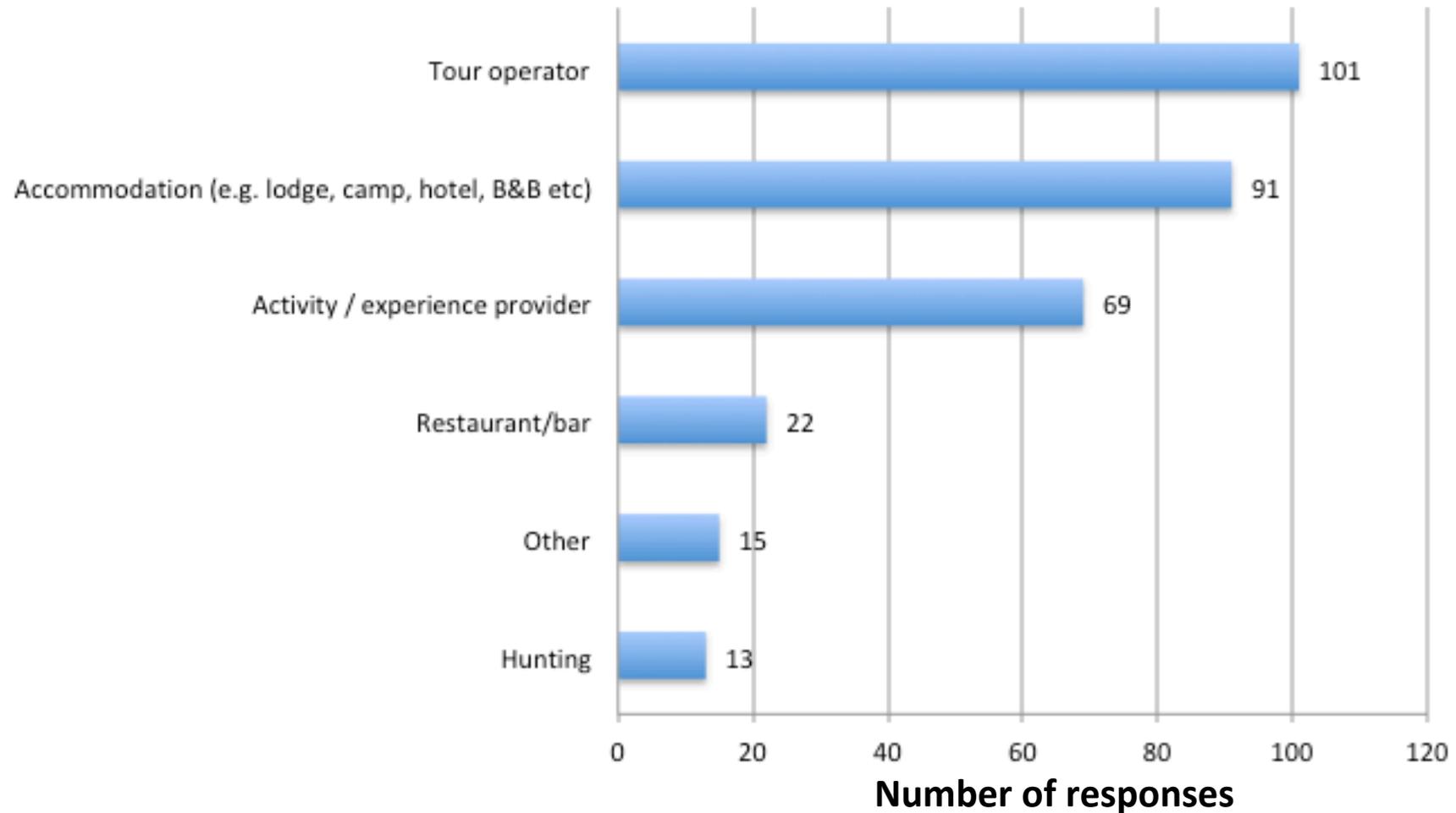
171 responses from operators working in GLTFCA

Countries of operation in KAZA:

- Angola: 2
- Botswana: 87
- Namibia: 40
- Zambia: 51
- Zimbabwe: 61

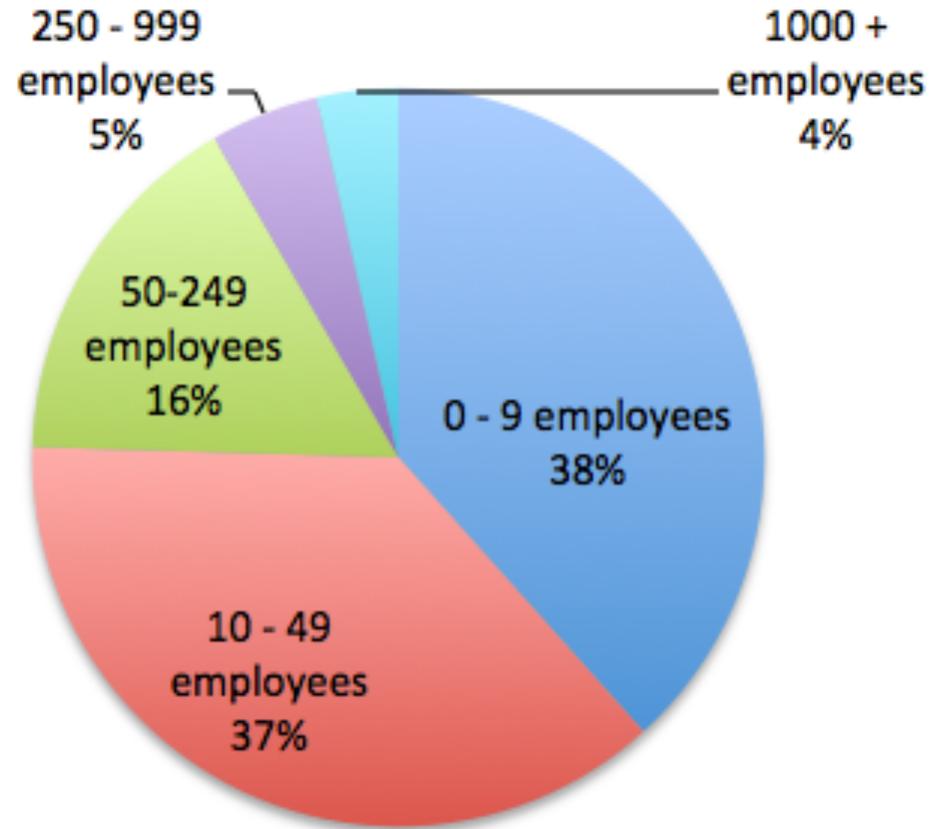
Note: Some respondents operate in more than one country

Type of product or service offered



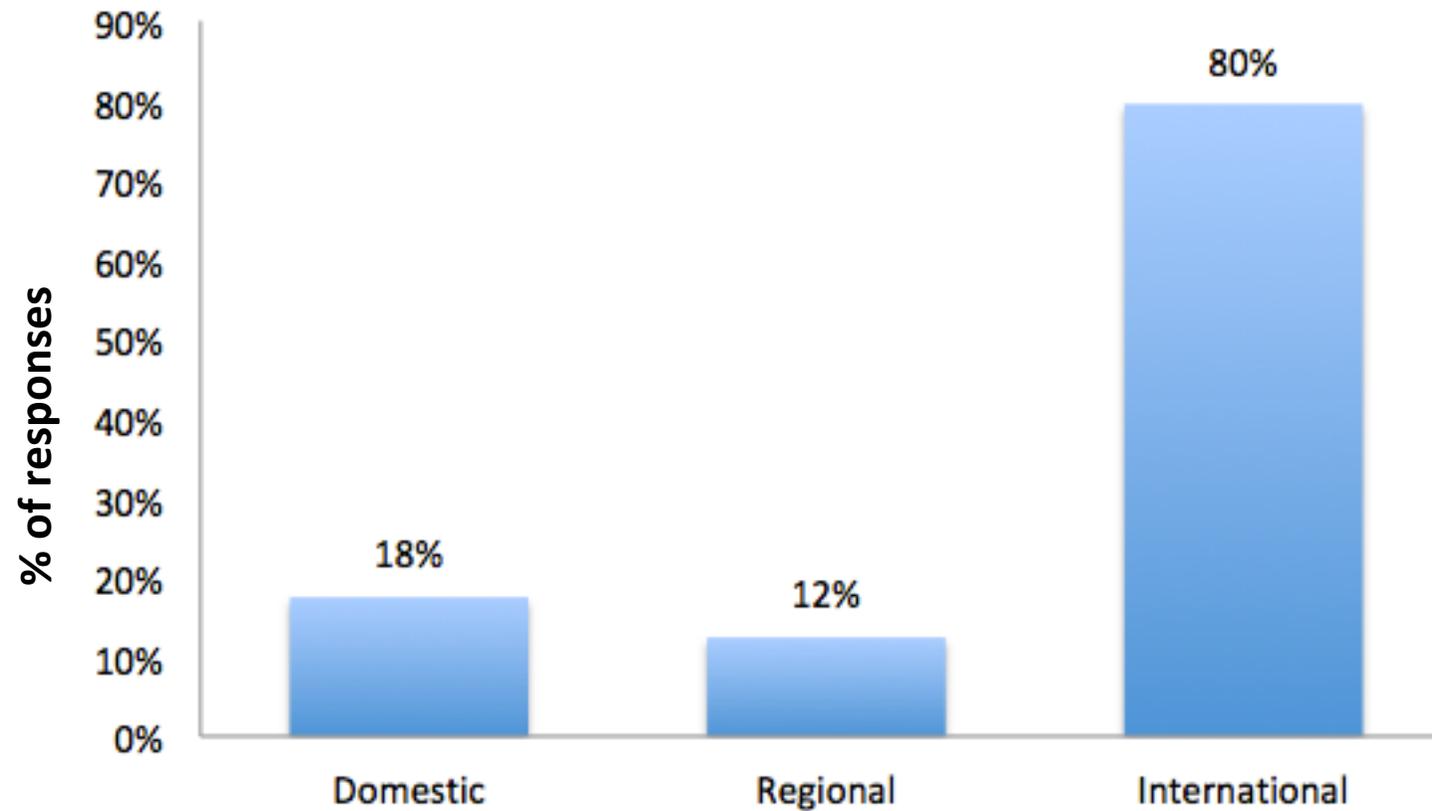
- Number of responses (n) = 171 (Question 2)
- Some respondents offered more than one product/service

Size of business (number of staff)



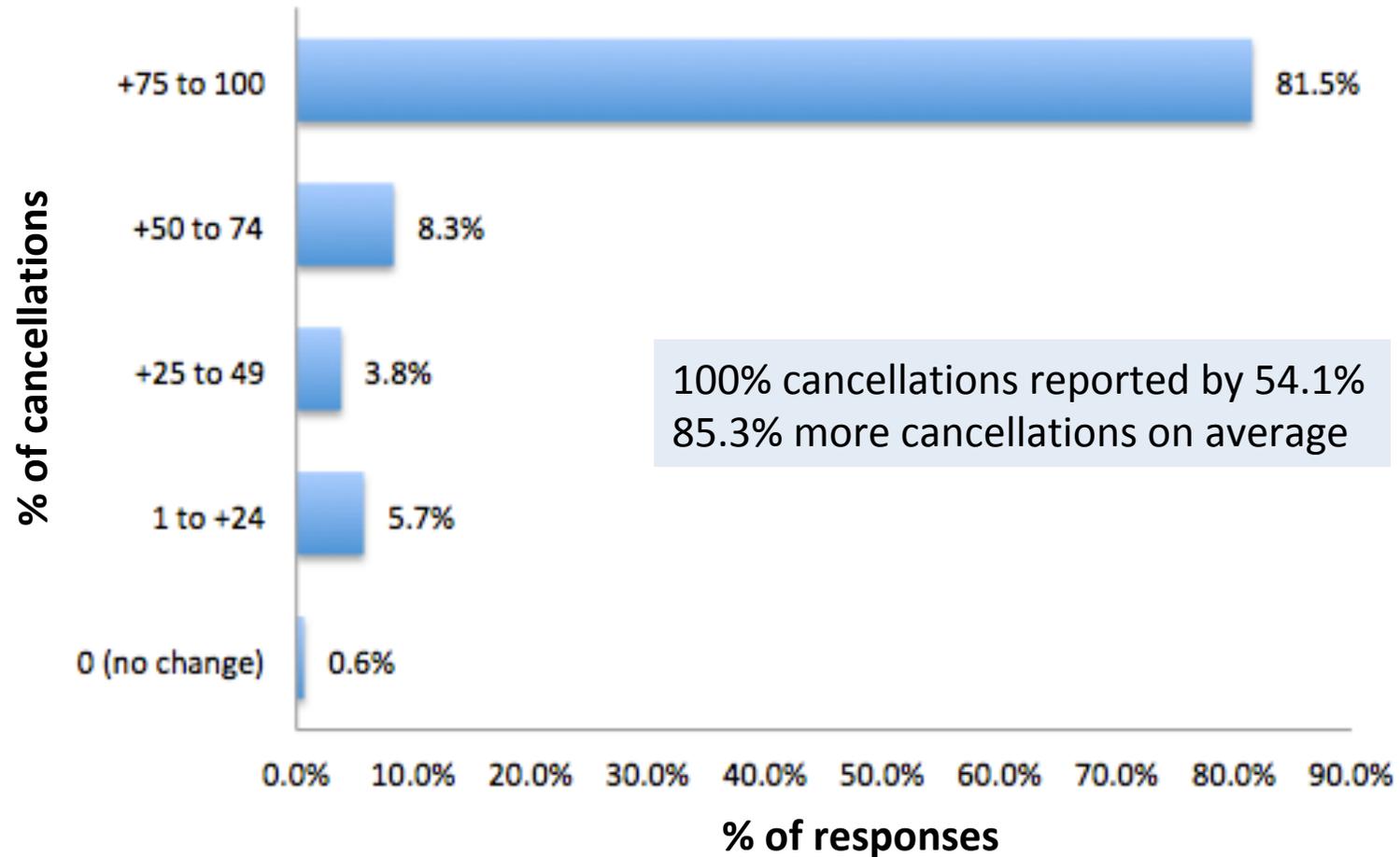
n=167 (Question 4)

Source markets (average %)



n=169 responses (Question 6)

Level of cancellations from March to June 2020

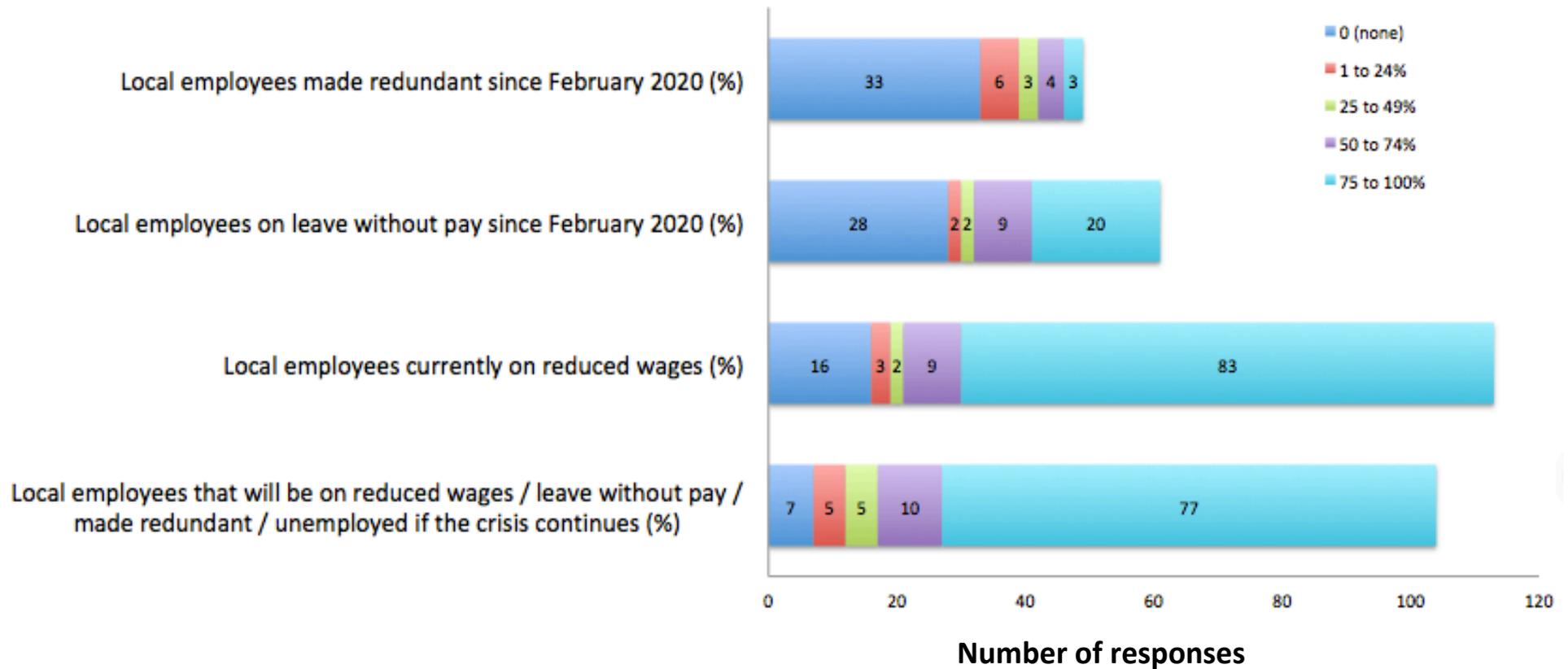


n=157 responses (Question 9)

Sample comments on customers, bookings, cancellations and revenues

Country	Comment
Angola	Angola in state of emergency with all borders closed to international commercial passengers
Botswana	Covid19 outbreaks globally totally change the tourism sector: prospects for the rest of 2020 are zero income. Hunger, deeper poverty, lawlessness, increased poaching are realities.
Namibia	We have zero income for March, April, May, June and cancellations are starting to take place from July as well.
Zambia	Our main season is May to November. We foresee that no clients will be able to visit us in the 2020 season
Zimbabwe	April, May & June have been effected outright, we are still waiting to see number for the rest of 2020. 90 - 95% of bookings for the rest of 2020 have been postponed to 2021.

Overview of local employment changes

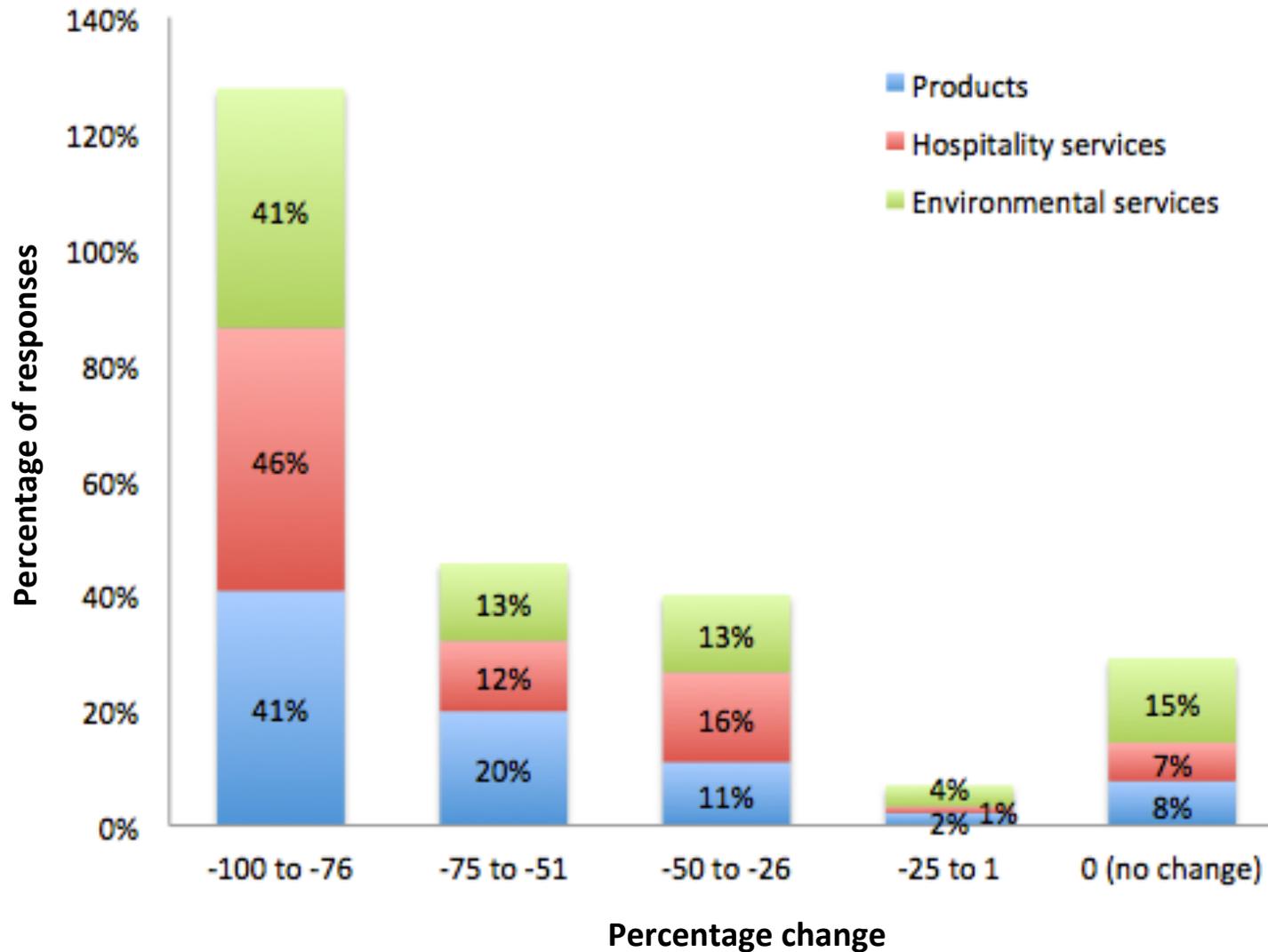


Composite of Questions 13 to 16

Sample comments on staffing

Country	Comment
Angola	We are self funding all staff for now. Review as we move forwards
Botswana	All staff members are on reduced salaries (40 to 60%) All staff members are still on medical insurance 100% paid by the company Staff members are working 25%
Namibia	We try our utmost to protect our employees jobs and their take home pay. Most of our employees are from rural Namibia and the people need the salaries for survival. We also try to keep our contributions to our communities and Conservancies intact.
Zambia	Our local employees and their families are dependent on their wages. We will do everything to keep all employees. We foresee a huge increase in illegal poaching and therefore require the anti-poaching rangers to protect our area.
Zimbabwe	We are currently holding all staff on 50% time for 50% salary. However, we cannot continue to pay 50% for longer than 3 months. After that we will need to make more drastic decisions. Zimbabwe does not have resources to allocate to benefits for staff who are not employed.

Likely change in value of local product procurement, hospitality support and environmental services expenditure

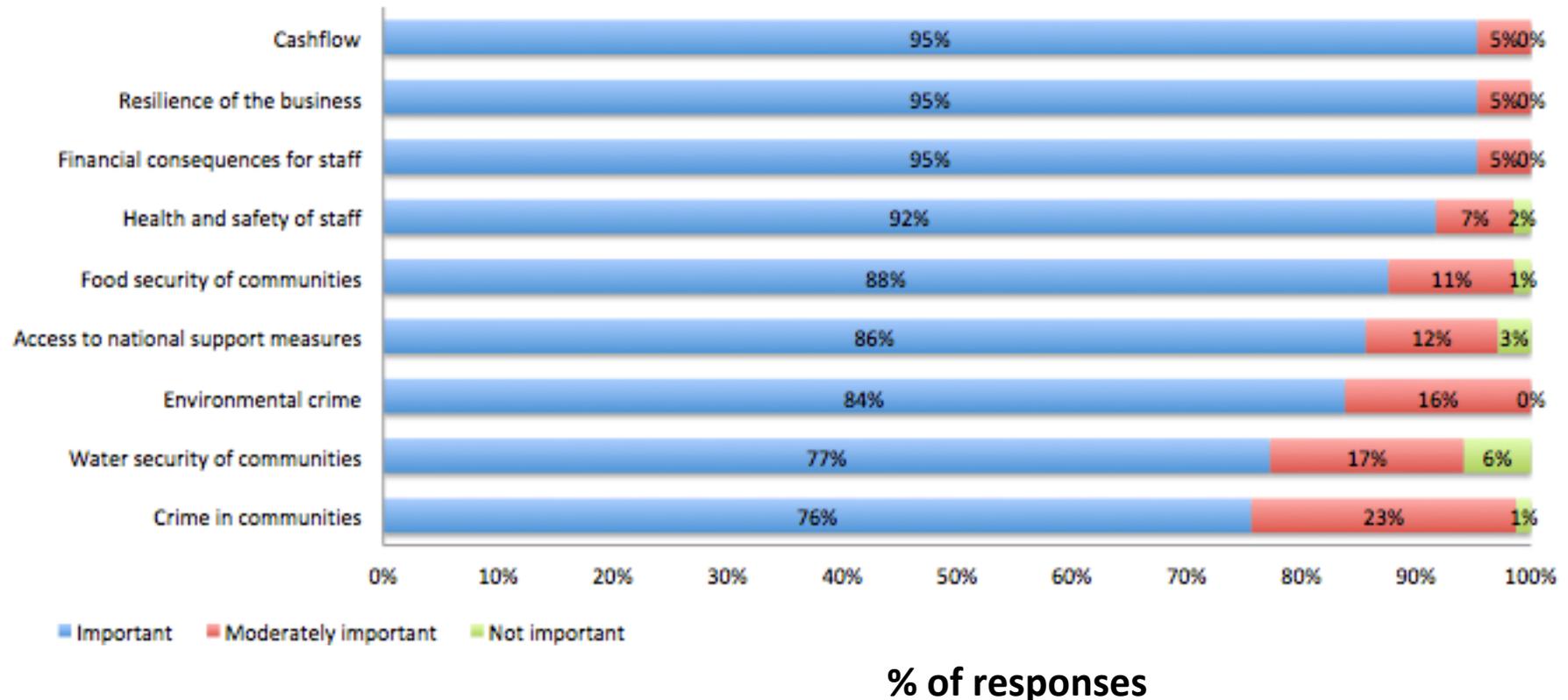


Composite of Questions 19, 21, and 23

Sample comments on local payments

Country	Comment
Angola	-
Botswana	80% of food and drinks in Botswana are imported there is however a increasing number of local producers supplying fresh vegetables . With the onset of Covid and no income we will reduce our spending by 100% .
Namibia	Without income and our lodges on lockdown, there will be zero expenditure for ANY hospitality services except for own sustainability which must come out of bank loans.
Zambia	The impact on local payments and suppliers is huge and perhaps not entirely quantifiable, especially in a place like Livingstone, Zambia, which is a major tourist hub due to this being the location of the famous Victoria Falls.
Zimbabwe	We run a volunteer programme to help local schools, whereby tourists pay to help out in schools, building classrooms, play areas and self sustaining vegetable programmes, plus anti poaching projects such as snare sweeps and also planting of indigenous trees. This will not happen in 2020

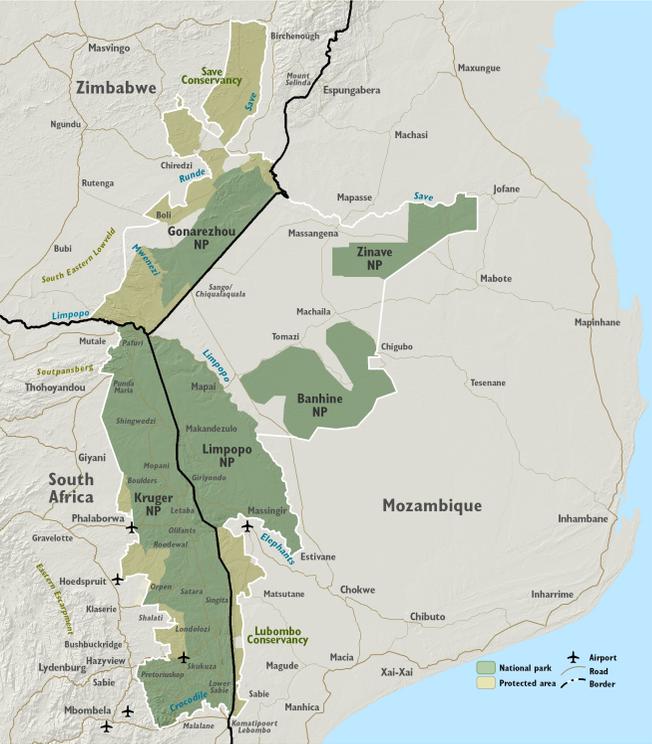
Operator's most immediate concerns



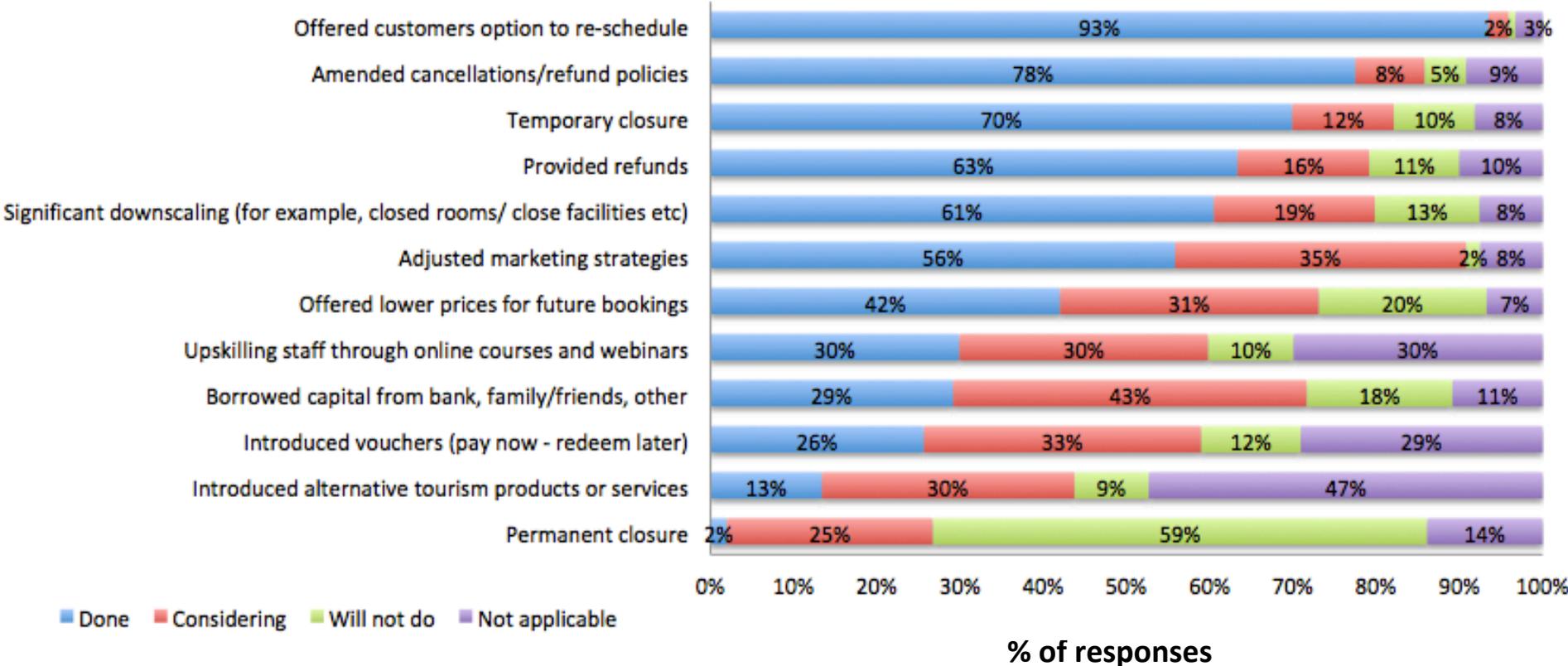
n=122 responses (Question 26)

Percentages are given as a proportion of responses to each option

Solutions for respondents operating in GLTFCA and KAZA TFCA



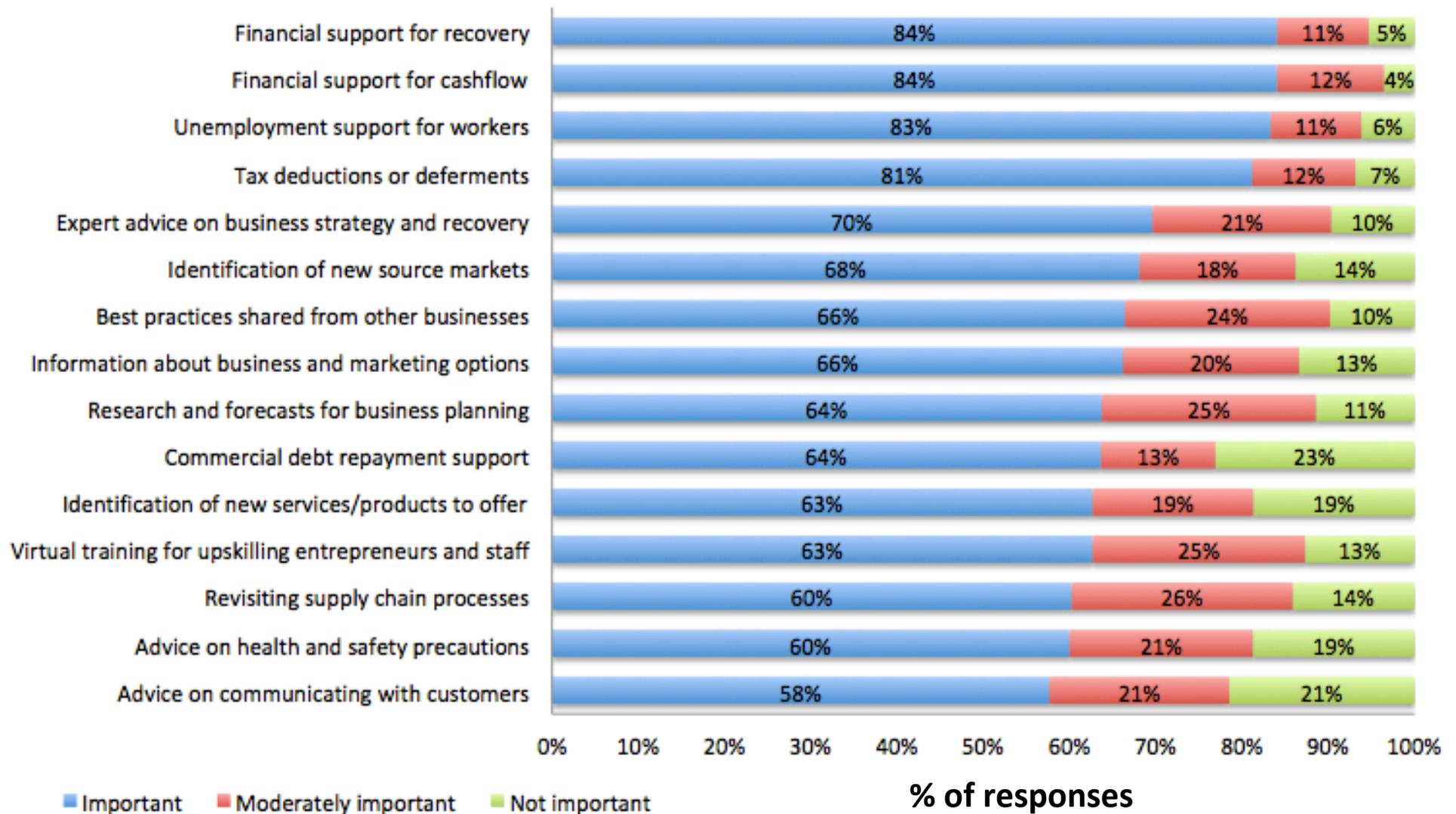
Measures put in place, or being planned, due to COVID-19



n=125 responses (Question 11)

Percentages are given as a proportion of responses to each option

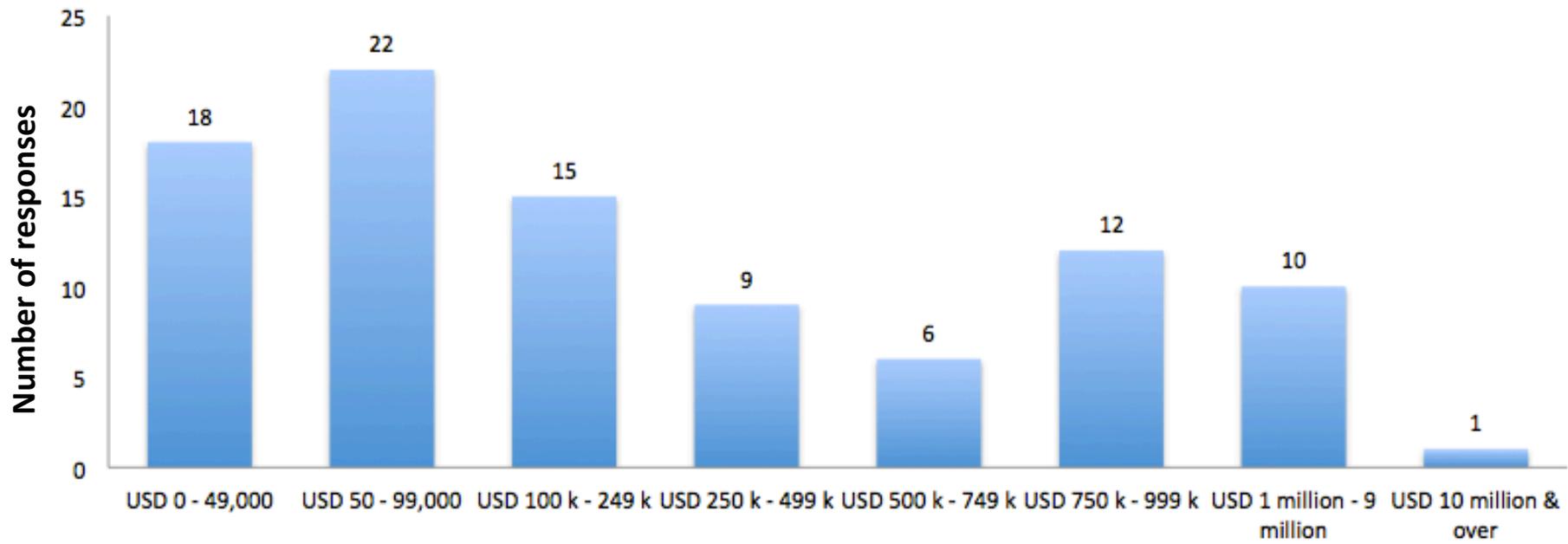
Support needed



n=98 responses (Question 33)

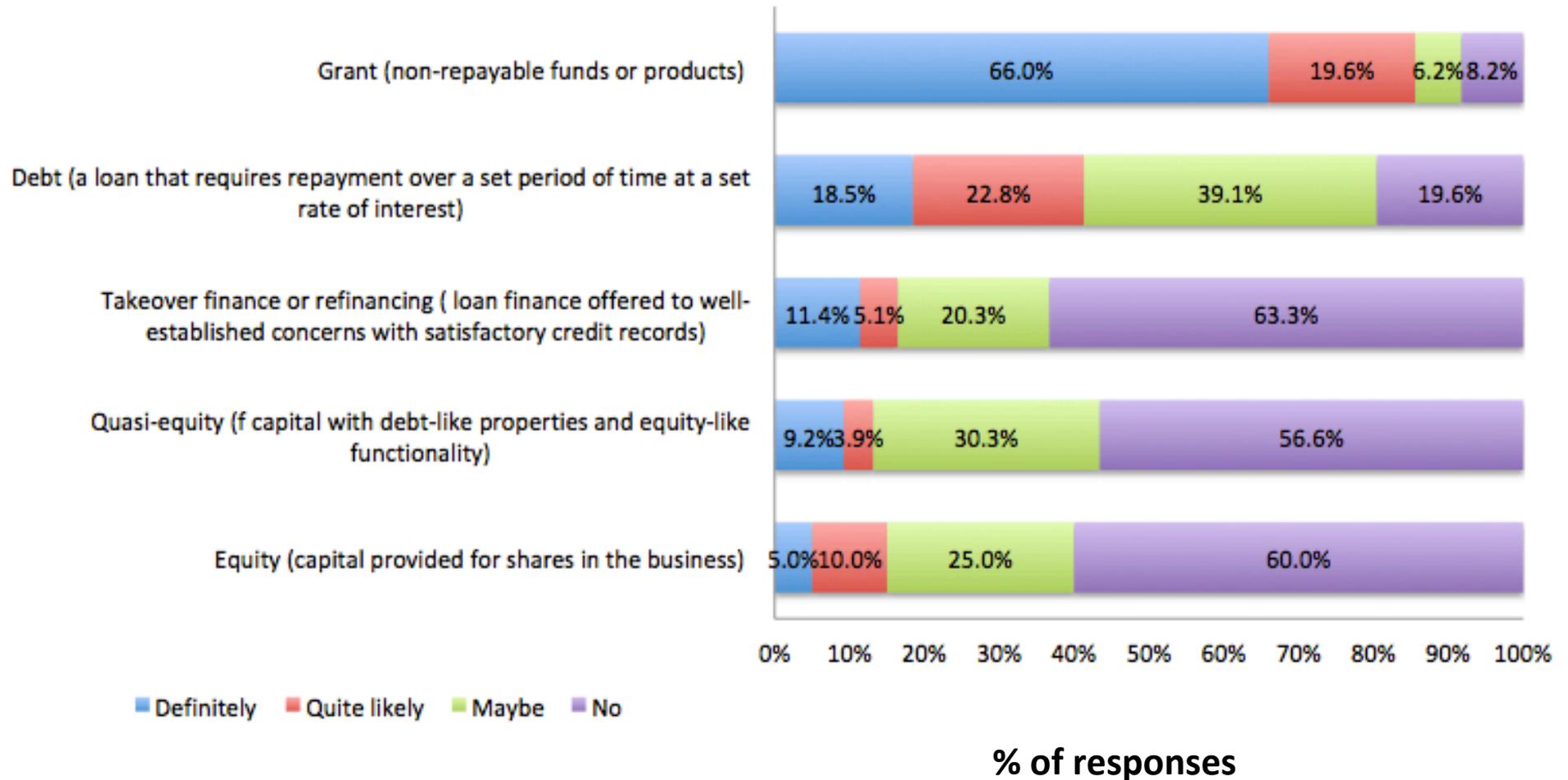
Percentages are given as a proportion of responses to each option

Approximate value of financial support required the enterprise can support itself again



n=93 responses (Question 34)

Type of financial support sought



n= 96 responses (Question 36)

Percentages are given as a proportion of responses to each option

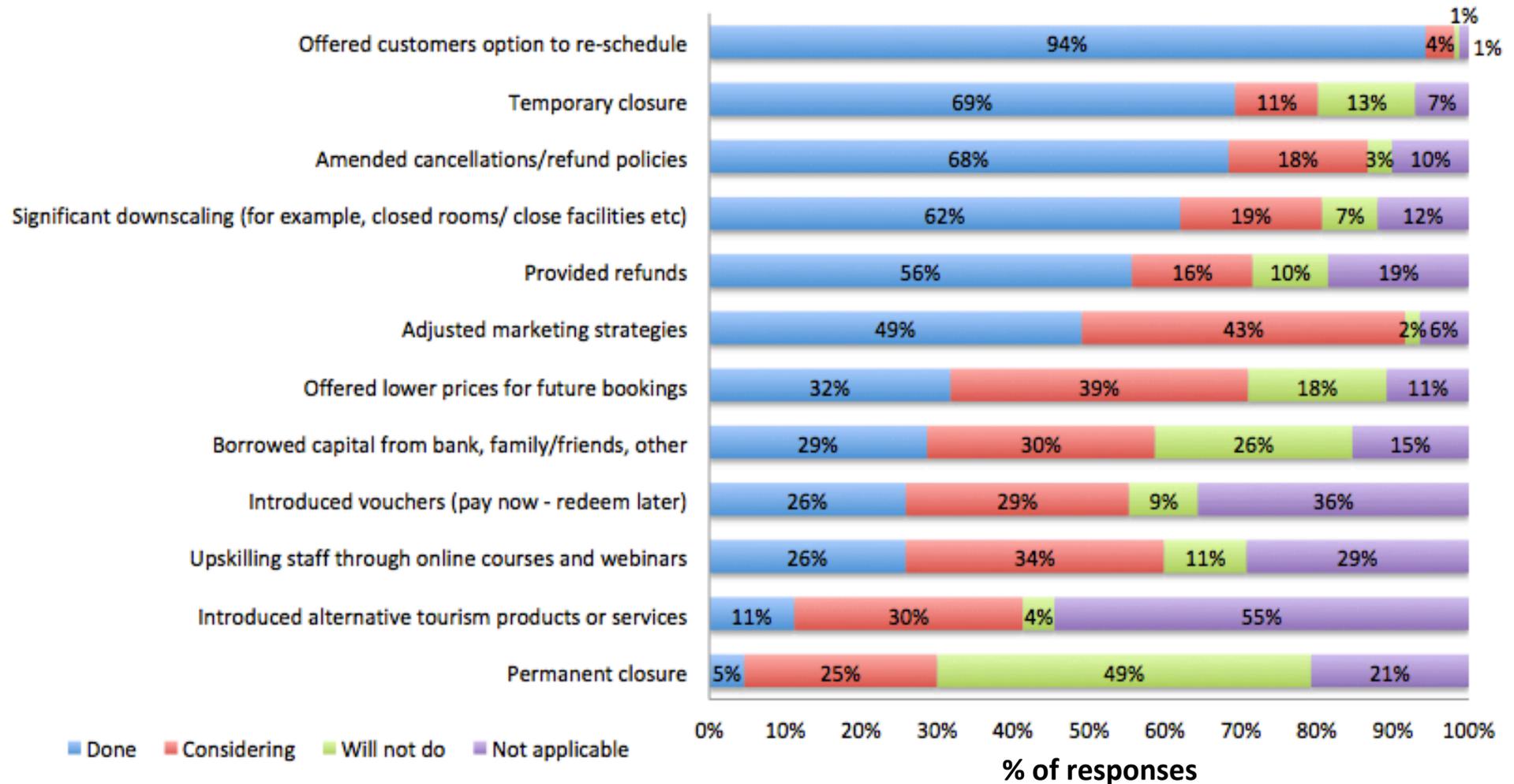
Further sample comments

Country	Comment
Mozambique	Our biggest concern & priority is the support that we offer to our local community & our anti poaching efforts. The duration of the COVID 19 effects will greatly impact us and will only be recognised as time goes on.
South Africa	We were doing well and were growing when covid 19 hit us, now we don't know if we will survive.
Zimbabwe	We are really dependent on air travel opening up again, this is the critical factor to our tourism sector getting back on its feet.

Solutions for KAZA TFCA respondents



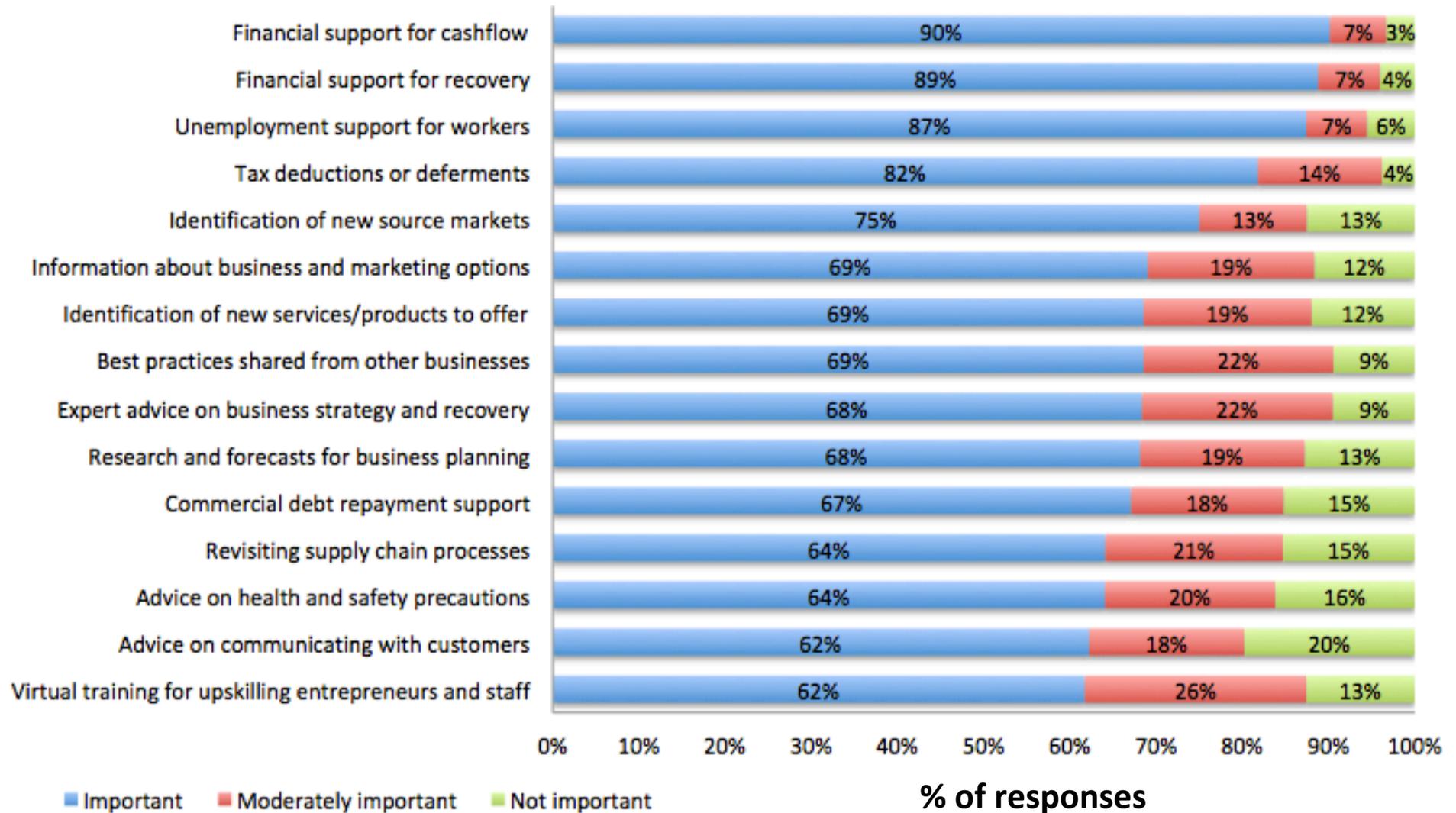
Measures put in place, or being planned, due to COVID-19



n=161 responses (Question 11)

Percentages are given as a proportion of responses to each option

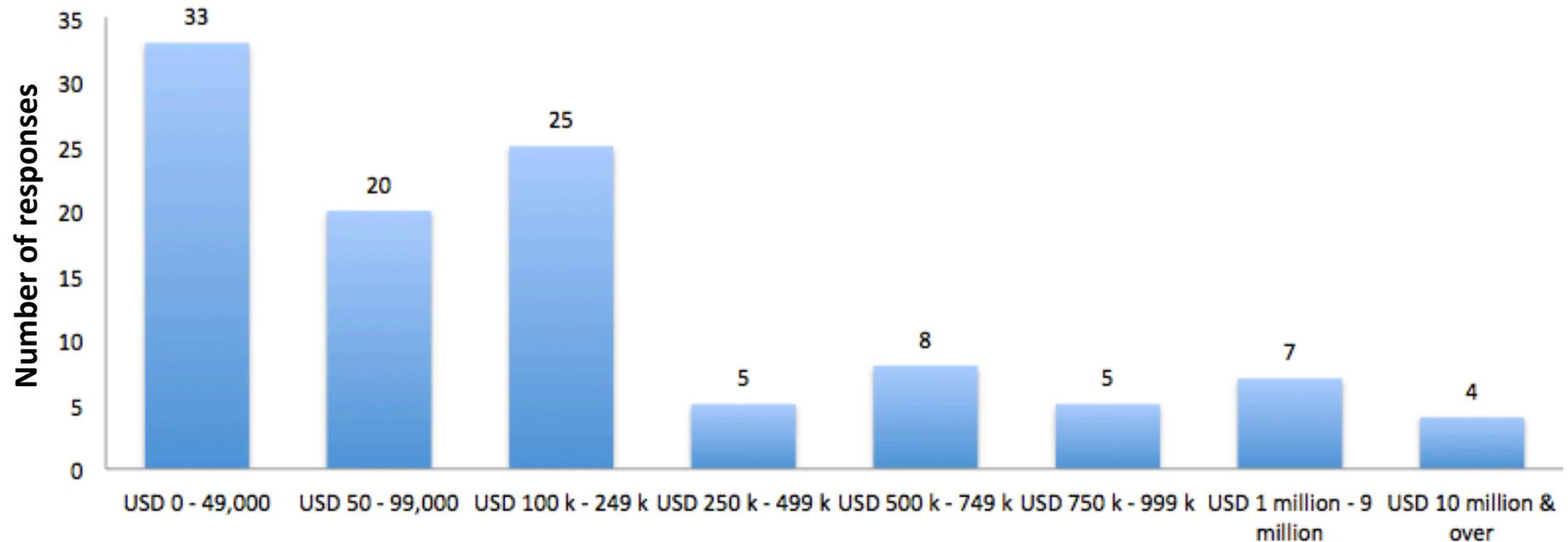
Support needed



n=110 responses (Question 33)

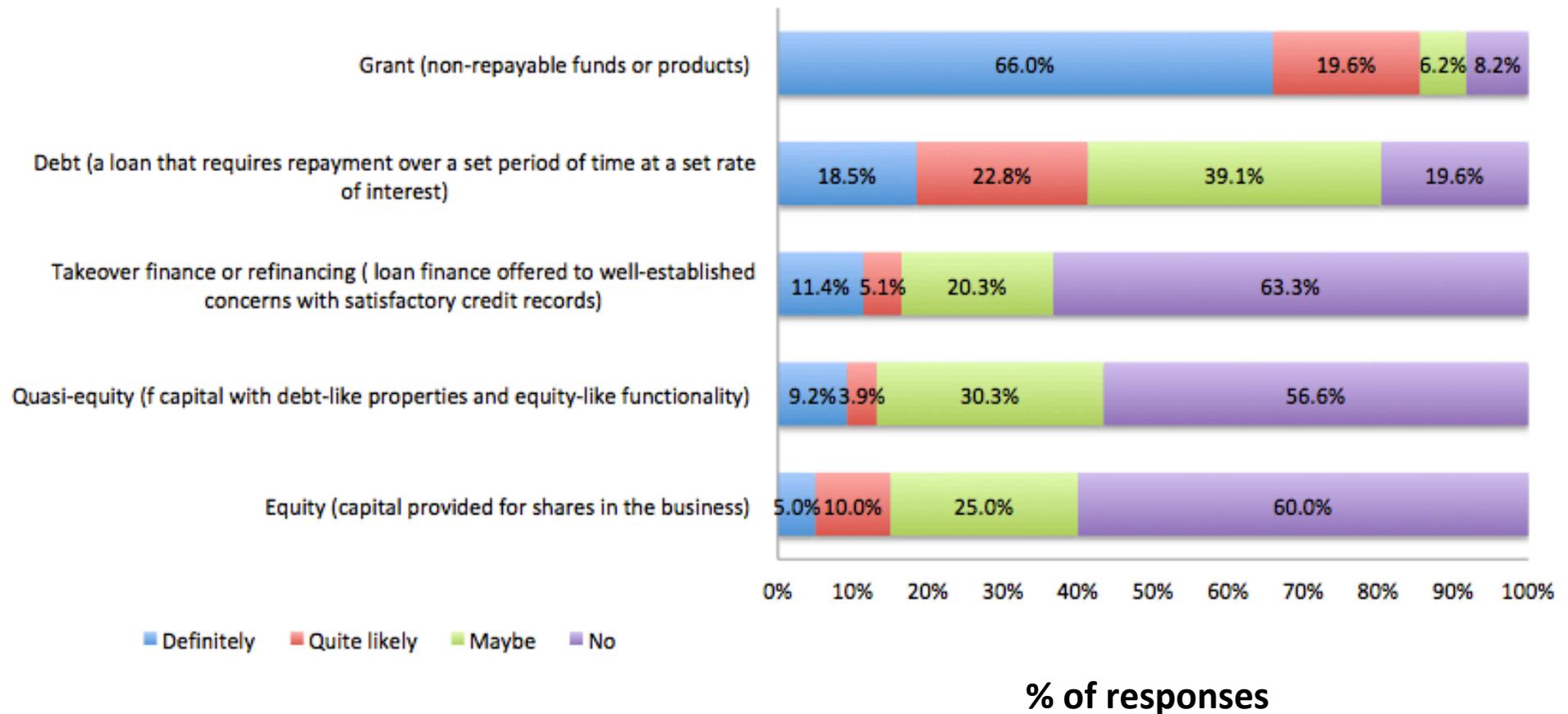
Percentages are given as a proportion of responses to each option

Approximate value of financial support required the enterprise can support itself again



n=107 responses (Question 34)

Type of financial support sought



n= 108 responses (Question 36)

Percentages are given as a proportion of responses to each option

Further sample comments

Country	Comment
Angola	Angola has suffered a “double whammy”, insofar as it has what is effectively a mono economy with oil. The price of which has crashed.... The informal economy has so far been allowed to continue at a limited level. Complete lock down in countries such as Angola cannot happen as many people have to work today to eat today.....
Botswana	The tourism sector in Africa has to show a unified front in declaring a universal policy of deferment rather than cancellation of existing safaris.
Namibia	The impact of tourism in rural Namibia is huge in terms of communities but also in terms of conservation and a collapse of tourism will have dire consequences
Zambia	The situation for Zambian tourism is catastrophic. Without some form of intervention there will be no tourism companies left by 2021.
Zimbabwe	We need to ensure that there is support for all sectors in the conservation and tourism areas to ensure they are able to restart when things return to normal.

Moving forward: Financial resources

Open grant applications: EU funding of Euro 6 m available via grants through:

- IUCN Save Our Species Wildlife Rapid Action Grants: <https://portals.iucn.org/sos/>
- Biopama Rapid Response Grants: <https://action.biopama.org>

Online appeals: e.g. TFPD, andBeyond, Great Plains Foundation, Kasanka Trust

Stimulus funds in development:

- **Investment platform for conservation economies in Africa:** IFC, Alberg, Exeo Capital, Nature Investment Company + Boundless Southern Africa, Space for Giants
- **Collaborative platform:** USD 1.9 m GEF project in development – MAVA foundation, UNDP, DFID, Jamma International, FFI, WWF (Luc Hoffmann Institute)

Moving forward: Technical resources

- **World Bank e-book on nature based tourism tools and resources (+360 links):** <http://appsofelydigital.com/nbt/filters.html>
- **Visitation to protected areas in light of COVID-19 (available for review):** <https://annaspenceley.wordpress.com/2020/07/02/visitation-to-protected-areas-in-light-of-covid-19-input-requested/>
- **Resources & links on COVID-19 and tourism (+700 links):** <https://annaspenceley.wordpress.com/2020/04/02/covid-19-and-sustainable-tourism/>

Acknowledgements

Data collection for Africa was supported by the European Union:



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Further acknowledgements

- **Review of the draft questionnaire:** EU, Boundless Southern Africa, Madikwe GR, IFC, SANParks
- **Pilot questionnaire testing:** Madikwe GR
- **Survey distribution:** EU, Boundless Southern Africa, Madikwe GR, World Bank Group (incl. IFC and Global Wildlife Program), USAID, UNDP, IUCN, IUCN WCPA TAPAS Group, WWF, UNESCO, The Long Run, Safaribookings.com, GLTFCA, KAZA TFCA, SADC /GIZ TUPNR, African Travel and Tourism Association and others
- **Mapping of responses:** EU Joint Research Centre

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