

IMPACT OF COVID-19 2020 | Statistics & Case Studies from around Africa.



This is a collection of slides summarising KEY information & statistics taken from 2 main sources:

1. [State of the Wildlife Economy in Africa](#), from the ALU School of Wildlife Conservation. This is a “first of it’s kind” 436 page report. Part of the report focusses on tourism as a key component to the wildlife economy and there are a collection of fantastic Case Studies that support the importance of tourism and effect Covid-19 has had. The countries chosen were based on availability of stats, given the hindrance of travel due to Covid-19.
Citation: Snyman, S., Sumba, D., Vorhies, F., Gitari, E., Enders, C., Ahenkan, A., Pambo, A.F.K., & Bengone, N.(2021). State of the Wildlife Economy in Africa. African Leadership University, School of Wildlife Conservation, Kigali, Rwanda.

2. [Oxford Economics](#)

Statistics from 6 African Countries:

- Kenya
- Namibia
- Rwanda
- South Africa
- Zambia
- Zimbabwe

Whilst there are no definitive results with the exact impact on Covid-19 on African Travel & Tourism, together these statistics and Case Studies make for current and relevant situations facing wildlife, communities and countries that rely on international tourism. There is a vast amount of additional information provided in the report which you can download in the link above or [HERE](#).

When using these statistics in marketing material / PR, please reference the material in your pieces:

@Oxford Economics Ltd | ALU School of Wildlife Conservation

The State of the Wildlife Economy in Africa

Impacts of Covid-19 on wildlife tourism and conservation (pg23)

The impacts of COVID-19 have been devastating for Africa.

In the first half of 2020, international tourist arrivals in Africa declined 57%, with an estimated 99% drop in the second quarter; North Africa (-62%) suffering the biggest impact in the first half, while arrivals **in sub-Saharan Africa declined an estimated 54%** .

EcoTourism – Key Messages (pg48)

Overall, in 2019 travel and tourism in Africa contributed a total of **7.1% to Gross Domestic Product (GDP)**, as well as **24.6 million jobs** (WTTC, 2020).

- International tourism receipts in Africa totalled USD 38 billion in 2019, comprising 3% of global tourism receipts (UNWTO, 2019)
- In 2018, Africa was the second-fastest growing tourism region in the world with 7% growth in tourism and travel (WTTC, 2019).
- Before the COVID-19 pandemic, Africa’s tourism industry was growing faster than its economy as a whole (World Bank, 2013, in Signe, 2018).
- Africa still only receives a small amount (5%) of global tourism arrivals, indicating that there is significant room for growth in the tourism economy (WTTC, 2020).
- Many tourists come to Africa for the wildlife: therefore, protecting wildlife and habitats (the asset) will allow for tourism growth (World Tourism Organisation, 2015).
- **Tourism in Africa is mainly (70%) leisure driven with international tourism contributing 44% to Africa’s tourism industry.**
- **The wildlife safari industry in Africa is estimated at between USD 12.4 billion (direct) and USD 42.9 billion (total) (UNWTO, 2020d)**

Traditionally, tourism is seen as one of the key components, if not the only activity, of the wildlife economy of many countries. The recent COVID-19 pandemic has highlighted the risks associated with this approach and the important need to diversify and make wildlife economies as a whole, and tourism itself, more resilient.

(pg49) Tourism contributes a large share to the economies of the **Small Island Developing States**, and they were thus **most severely hit by the COVID-19 pandemic**. In Kenya, **70% of the Kenya Wildlife Service’s budget is sourced from tourism** and in Zimbabwe, **Zimparks relies fully on tourism revenues for its operational budget** (UN, 2020). Similarly, in South Africa, **80% of SANParks’ revenue comes from tourism**. The COVID-19 pandemic impacts have thus put the operations of many national protected area authorities in jeopardy due to a lack of funding from tourism.

Table 2.4: Tourism dependency by tourism contribution to GDP

Region	Severe = >20% GDP in tourism	High = 10-20% GDP in tourism	Medium = 5-9% GDP in tourism	Low = <5% GDP in tourism
North Africa		Morocco, Tunisia	Algeria, Egypt	Libya
Sub-Saharan Africa	Cabo Verde, São Tomé and Príncipe, Seychelles	Botswana, Comoros, Côte d’Ivoire, The Gambia, Lesotho, Madagascar, Mauritius, Namibia, Rwanda, Tanzania	Benin, Cameroon, Central African Republic, Ethiopia, Ghana, Kenya, Malawi, Mali, Mozambique, Niger, Senegal, South Africa, Sudan, eSwatini, Togo, Uganda, Zambia, Zimbabwe	Angola, Burkina Faso, Burundi, Chad, Congo Republic, Democratic Republic of Congo, Gabon, Guinea, Nigeria, Sierra Leone

Source: WTTC, 2019 data; adapted from World Bank, 2020.

Conservation trends in Africa (pg378)

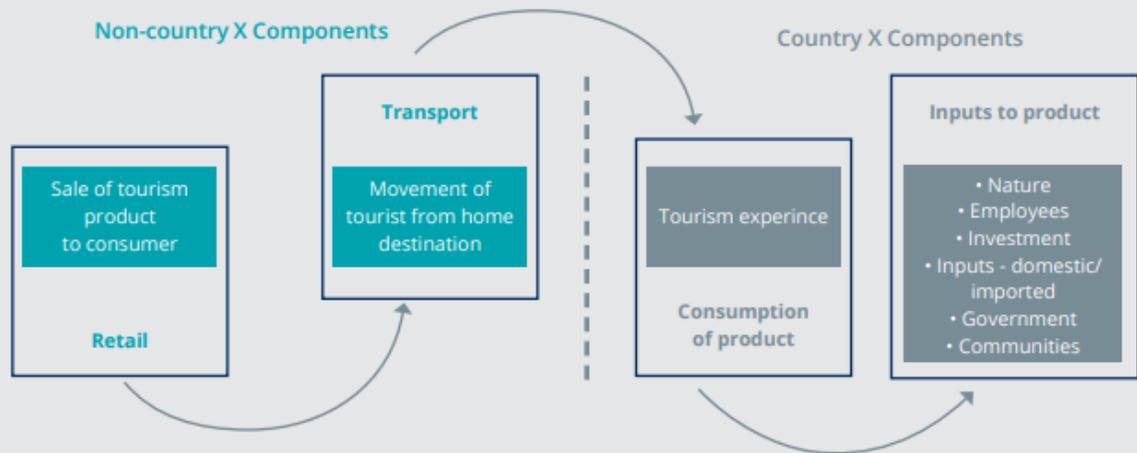
Conservation and especially protected areas are underfunded by African governments. In many countries, protected and conserved areas are funded through revenue from tourism, which has collapsed during the COVID-19 pandemic resulting in impacts of unprecedented scale and severity, the main one being further reductions in funding available for conservation and a breakdown of incentive systems for communities.

Strengths and opportunities for the tourism sector pg75

- The tourism sector creates employment in rural areas, reducing the rural-urban migration.
- The tourism sector provides employment for skilled, semiskilled and unskilled workers, including many women.
- The tourism sector is a generator of tax revenues for different levels of government – local and national.
- The tourism sector impacts regional (national and local) economic activity, through value chains and multipliers.
- The tourism sector has strong linkages to other sectors of the economy, such as agriculture, transport, communications, and to some extent the manufacturing industry.
- The tourism sector can bring benefits to local communities in various ways, including through employment, lease agreements, capacity building through skills training and development.
- Ecotourism revenues can be reinvested into conservation, as well as through philanthropy/guest donations.
- The presence of ecotourism operators in an area can inhibit poaching activities (lack of tourism during the COVID-19 pandemic highlighted this benefit).

International Tourism Value Chain

Figure 2.15: International tourism value chain



Source: Centre for Applied Research, 2019.

Tourism revenue sharing by protected area authorities

There are a number of protected area authorities that have some form of revenue-sharing programme in place. Such programmes are important in terms of building a constituency for conservation and ensuring that communities living around protected areas receive some form of tangible benefit from protected area tourism. Some programmes **distribute cash to communities through community trusts** (e.g., Mozambique and Tanzania) and others **use funds to finance community development projects** (e.g., Rwanda, Uganda, Zambia and Zimbabwe) (Spenceley et al., 2017b). The proportion shared with local communities varies across countries, from 1% (South African National Parks) to 20% (Uganda and Tanzania)

Case Study within Rwanda on page 12

Impact of Tourism on Park Fees

- The UNWTO (2015) found that a total of 14 African countries were generating USD 142 million in park entrance fees. (pg66)

Table 2.9: Summary of tourism and park entry fees in three countries

Country	Year	Number of tourists in parks	Total tourism income from parks (USD)	Conservation/park entrance fees (in USD)	Notes
Botswana	CY 2018	471,667	3.8 million	2.4 million (88% of total fee revenue)	15% domestic tourism
Kenya (KWS)	CY 2018	2.9 million	52.7 million	30.25 million (57% of total fee revenue)	30% domestic tourism
South Africa (SANParks)	FY 2017/2018	6.6 million	132 million	49 million (36% of total tourism revenue)	64.6% domestic tourism

*FY: financial year; CY: calendar year

Sources: KWS, 2018; Ministry of Tourism and Wildlife (MoTW), 2019; SANParks, 2019; MENT, 2019.

Influence of Tourism Spending in Africa

A meta-analysis showed that **for every USD 1 of direct spending in protected areas in Africa** (including park fees, lodge nights, activities booked at lodges/camps, etc.), **an additional USD 0.79 is spent in the local economy.**

For Example: Uganda: Tourism directly employs more than **670,000 Ugandans** and funds generated from the tourism sector are invested back into the implementation of wildlife conservation activities (90% of the Uganda Wildlife Authority (UWA) budget is from tourism activities in the parks and reserves). Tourists pay USD 600 per person to track gorillas, and **communities living around the forest receive USD 10 per gorilla permit sold, plus 20% of the US 40 park entry fee, in recognition of the importance of their support for conservation**

Private Sector Case Studies

1. Ecotourism in Rwanda & Uganda: Volcanoes Safaris (2017-2019) pg 50

- Number of staff: 113; number of office staff: 32; number of other temporary/contracted staff: 31.
- Total taxes paid: USD 2.8 million, and **total salaries paid: USD 2.4 million.**
- **Support to community projects:**
 - Kyambura Lodge: USD 452,935
 - Bwindi Lodge: USD 33,595
 - Gahinga Lodge: USD 175,350
 - Virunga Lodge: USD 59,604
 - **Total community project expenditure: USD 721,485.**
- Volcanoes Safaris Partnership Trust, which operates these community projects, employs 57 staff, with total taxes paid of USD 18,655 and total salaries of USD 68,351 (Volcanoes Safaris, 2020, pers. comm.).

The four lodges contribute a significant amount not only in terms of community projects, but also through the ecotourism business: company and personal taxes, salaries, lease fees, etc

2. AFRICAN PARKS & Akagera NP, Rwanda (pg303)

- The Rwandan Development Board (RDB) signed a twenty-year partnership agreement with African Parks (AP) to co-manage Akagera National Park.
- **Akagera generated USD 2.5 million in revenue in 2019, making it 90% self-financing.**
- **The revenue sharing contribution of 10% from all park activities at Akagera in 2019 totalled USD 159,674 (Ibid.)**
- Community benefits provided by the park, including local staff salaries, local purchases and equipment hire, amounted to **USD 525,817 in 2019**
- After ten years of a successful partnership, in which Akagera now hosts the Big Five, and is close to earning sufficient revenue to fund itself, in October 2020.

3. Namibia (pg394)

- Community conservation initiatives have improved the lives of rural populations by **providing alternative sources of income as well as job training for enterprises** such as crafts, indigenous natural products, and wildlife utilisation. In the Zambezi Region alone, conservancy income increased from USD 27,527 in 2000 to USD 3,506,629 in 2015. **Community conservancies across Namibia are generating roughly USD 10 million in income** and are accounting for over **5,300 jobs**
- **86 conservancies cover 20.2% of Namibia's land area.**
 - Elephant numbers have grown from a low of 7,000 to over 22,000.
 - Community conservation covers 169,331 km², which is about 55.3% of all communal land, with an estimated 222,871 residents (another approximately 6,257 members of the Kyaramacan Association live in Bwabwata National Park).
 - Of this area, conservancies manage 166,179 km², which comprises 20.2% of Namibia.
 - From the beginning of 1990 until the end of 2018, community conservation contributed an estimated NAD 8.375 billion / USD 490 million to Namibia's net national income.
 - In the Zambezi Region in 2018, 4,092 km² of land had been designated as conservancies. With 32,174 people living there, this constituted a total of 33.9% of communal area residents living in these conservancies.

4. Wilderness Safaris Botswana – Case Study (pg56)

- Employment includes approximately **1,000 jobs**
- **Staff were supporting on average 8 people**, resulting in an indirect impact of an additional 8,000 people and accounts for 0.57% of private sector employment and around 5% of employment in the hotel and accommodation industry in Botswana.
- The company created approximately 3.9 jobs per BWP 1 million / USD 94,877 of value added in 2017/18; this compared with a figure of approximately 2.2 jobs per BWP 1 million / USD 94,877 of value added across the entire non-mining private sector.
- Lease fees to communities: BWP 5.3 million / USD 494,865 paid to community trusts in 2018 for tourism concessions.
- Salaries: BWP 116.5 million / USD 10.88 million paid in terms of salaries in 2018.

5. Zaina Lodge – Delivering impact through luxury wildlife safari tourism in Ghana Source (pg250):

- Largest ecotourism employer in West Gonja District and Savannah Region
- Increased perennial water supply for wildlife resulting in better dispersal of wildlife.
- The lodge has a mixed clientele of domestic, sub-regional and international visitors which is helping it to cope well with visitor fluctuations caused by COVID-19.

Socio-economic impact • Largest ecotourism employer in West Gonja District and Savannah Region with 73 permanent staff employed, 55% from the local area. Additional 110 jobs were created for locals during construction.

- Injected USD 5.4 million in the local district economy during the construction and operational phase since 2013. It has also paid USD 1,1 million in taxes and USD 400,000 in concession fixed and variable fees to Government since 2012.

- Increased visitation and gate receipts to the Park with significant spillover effects that have increased occupancy for budget hotels in the park.
- Support to local companies and producers for supplies for lodge operations, materials for construction and employment for linked local tourism enterprises.

Ecological impact

Dramatically increased perennial water supply for wildlife through construction of two new waterholes in the southeast quadrant of the park resulting in better dispersal of wildlife.

- Wildlife viewing, e.g. roan antelope, buffalo, hyaena, leopard, has increased in 5 km radius of lodge concession due to increased human and vehicle presence. Wildlife stress levels have reduced, as observed in reduced skittishness and flight reflex.
- Fire management has improved in concession resulting in better dry season fodder supporting higher wildlife numbers.

Non Private Sector Case Studies

CASE STUDY: Uganda (pg64)

Gorilla tourism provides significant economic benefits to the local communities. It is one of the country's primary tourist attractions and through this also plays a catalytic role in that some people who chiefly come to see the mountain gorilla end by visiting other wildlife areas and tourist attractions as well.

In Uganda's Vision 2040, the **tourism sector** is not only envisaged as one of the four economic growth drivers to spur economic transformation, but **also relied upon as a mechanism to alleviate poverty, generate revenue for the government and contribute to wildlife conservation.**

- Approximately 10% of Uganda is gazetted as wildlife conservation areas, including grasslands, forests and water.
- Tourism directly employs more than **670,000 Ugandans** and funds generated from the tourism sector are invested back into the implementation of wildlife conservation activities (90% of the Uganda Wildlife Authority (UWA) budget is from tourism activities in the parks and reserves).
- Tourists pay USD 600 per person to track gorillas, and **communities living around the forest receive USD 10 per gorilla permit sold, plus 20% of the US 40 park entry fee, in recognition of the importance of their support for conservation.** Gorilla permit sales increased by 40% in 2018/2019 to 40,331 permits, generating revenue of approximately USD 25.2 million.
- The shared revenue is managed by the respective District Local Governments and is used to fund livelihood and public goods projects decided upon by the beneficiary communities.
- **Communities also benefit directly from tourism through community-based tourism enterprise initiatives** that have been established since 1998 under the Uganda Community Tourism Association (UCOTA) and Community Based Tourism Initiative (COBATI). UCOTA represents 70 member groups countrywide, **comprising 2,121 individuals of whom 63% are women.**

Botswana

A recent study in Botswana, found that the total revenue from Park Authority fees in 2018 was BWP 41 million / USD 3.8 million, with 66% generated by Chobe National Park and 21% from Moremi Game Reserve.

Entrance fees contributed 88% to total fee revenue, followed by 5.2% from camping fees, 5% from vehicle fees and 2% from other fees.

Visitor numbers drive PA fee revenues and in 2018 totalled 471,667, with 79% of tourists visiting Chobe National Park.

CASE STUDY: The importance of natural resources in attracting tourists - Zimbabwe (pg 72)

- In 2019, the overall contribution of tourism to GDP was 6.3%, with a 3.7% contribution to employment.
- **In 2019, foreign receipts were estimated at USD 868 million**, with domestic receipts estimated at USD 379 million.
- The country received 928,754 visitors to its national parks around the country in 2019 and about 68% of these visited the Rainforest in Victoria Falls National Park (of which 78% were foreign), and the nearby Zambezi National Park (67% were foreign).
- Hwange National Park received 64,815 visitors in 2019, of which 57% were foreign, highlighting the importance of natural resources in attracting tourists, particularly foreign tourists.
- The case of **Zimbabwe 2019 contribution of tourism to GDP – 6.3% 928,754 visitors to its national parks**

CASE STUDY: SANParks Parastatal Ecotourism (pg345)

(2017 / 2018 Report) from 19 regions of South Africa

- Revenue: ZAR 1.6bn (approx. \$120m): 80% generated from tourism
- 7 million visitors (64.6% were south African)
- Conservation fees: ZAR 579m (approx. \$43.5m)
- Concession fees (private sector operated lodges): ZAR 83m (approx. \$6.2m)
- Accommodation: ZAR 718m (approx. \$54m)
- Other Tourism Income: ZAR 41m (approx. \$3.1m)

Figure 2.10: Contribution of leisure tourism spending to total tourism spending (WTTC, mean of the years 2017-19)

Source: European Commission – Joint Research Centre, BIOPAMA project, 2020

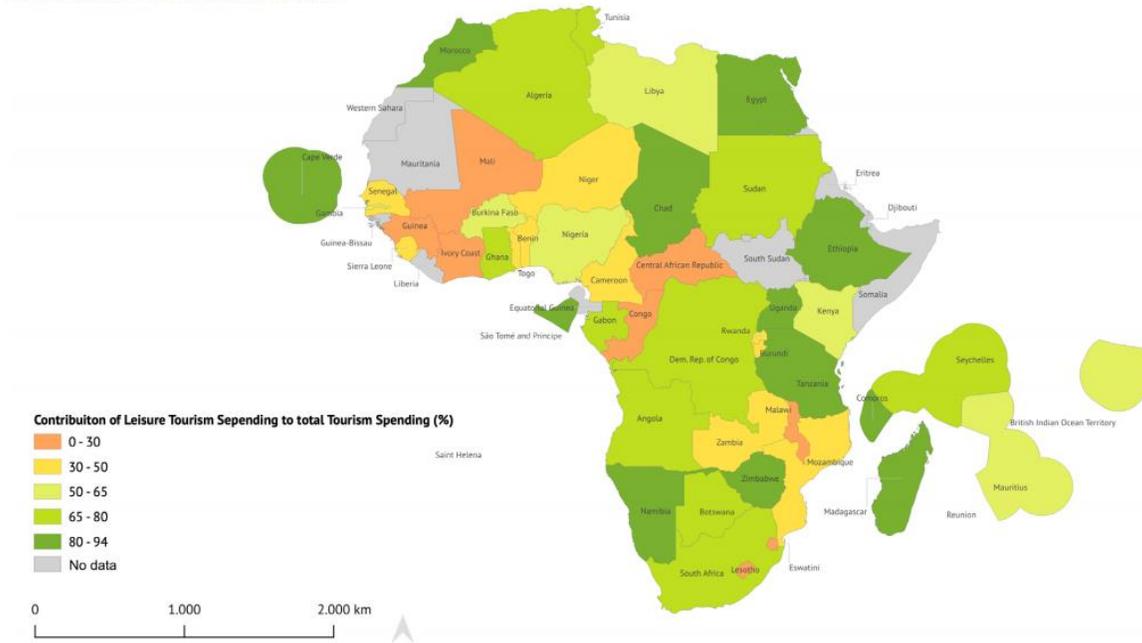


Figure 2.11: Contribution of leisure tourism spending to GDP (%) (WTTC, mean of the years 2017-2019)

Source: European Commission – Joint Research Centre, BIOPAMA project, 2020

**Small island countries are displayed by their exclusive economic zones

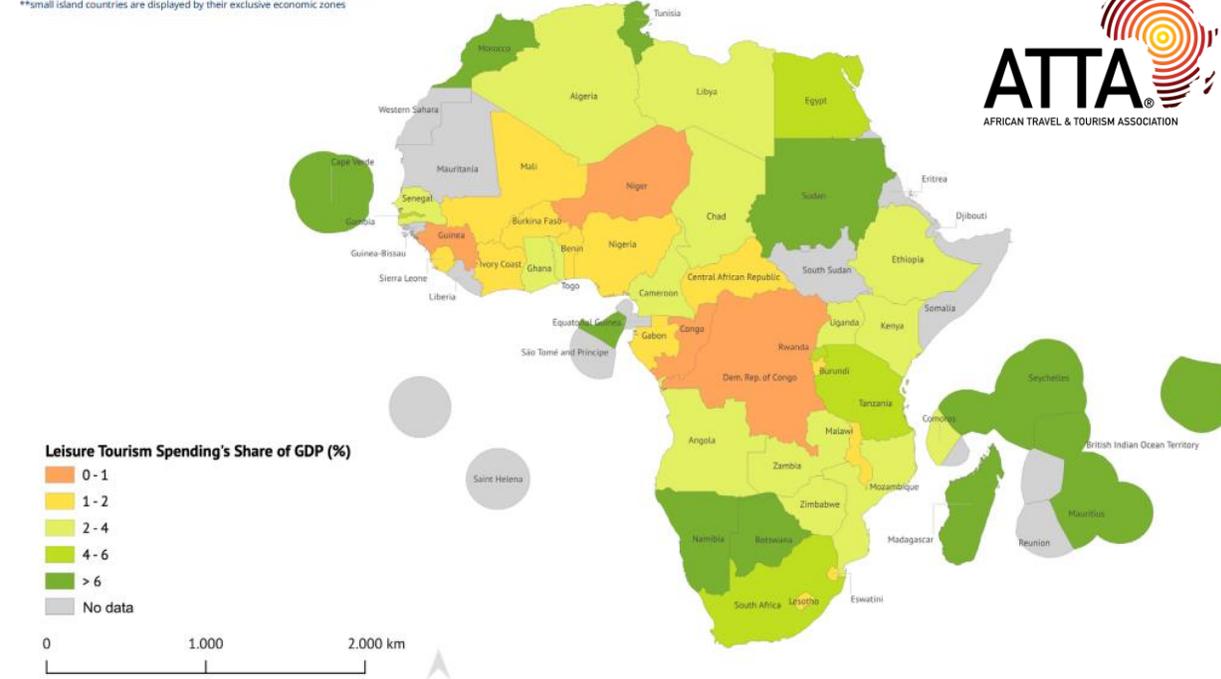


Figure 2.12: Contribution to GDP of leisure tourism spending associated with natural resources (WTTC, mean of the years 2017-2019)

Source: European Commission – Joint Research Centre, BIOPAMA project, 2020

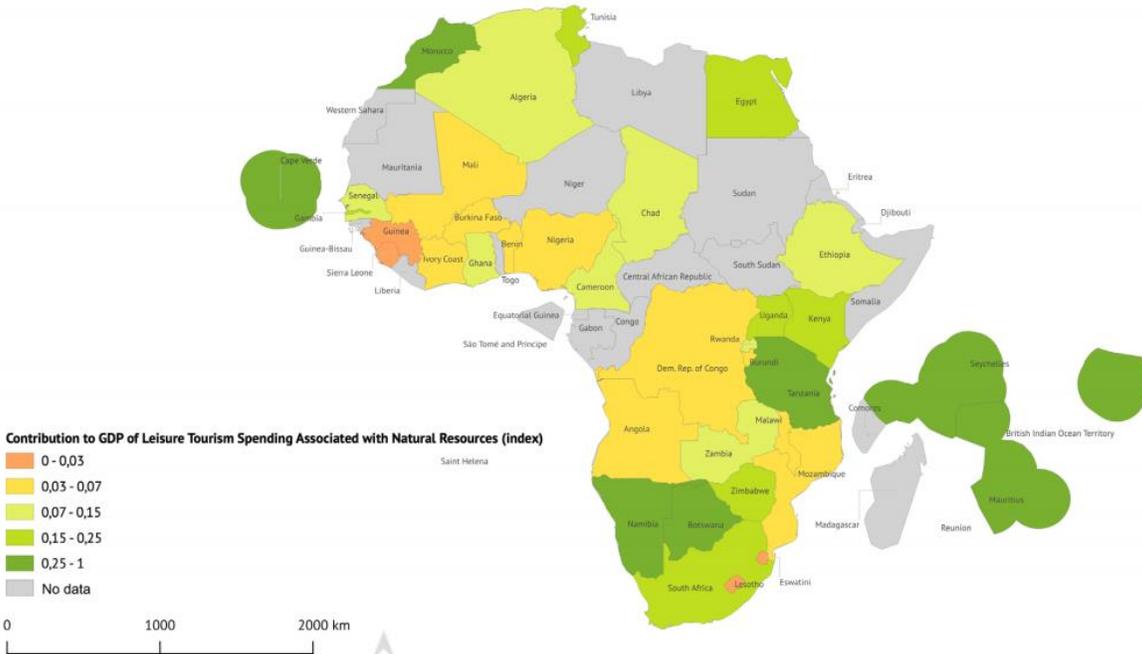


Figure 2.10 shows the total leisure tourism spending (leisure tourism spending represents the mean values for the years 2017 to 2019 in billion USD) per country, which indicates the overall size of the leisure tourism sector. Large economies such as South Africa, Morocco and Egypt show high values.

On the other hand, when considering the relative contribution of the leisure tourism sector to the overall economy (**Figure 2.11**) Seychelles and Cape Verde score high.

Figure 2.12 shows the leisure tourism spending that is associated with the country's natural resources, which is approximated by the contribution of natural resources to the total Tourism and Travel Competitiveness score (WEF et al., 2019). As compared with the overall leisure tourism spending, countries such as Namibia, Tanzania and Kenya show higher scores.

Case Study: KENYA (pg 265)

Kenya is one of the top wildlife destinations in the world, a pioneer for safari tourism and eco tourism in Africa. Largely wildlife based, contributes significantly to socio-economic development and poverty reduction.

COVID-19 impacts on the tourism industry in Kenya (pg260)

The COVID-19 pandemic has had a significant impact on the tourism economy in Kenya following the global shutdown in travel.

A government survey has estimated that tourism has **so far lost KES 80 billion (USD 750 million) and almost 1.3 million jobs in the travel industry**. Over 81% of tourism companies have reduced staff and about 85% have implemented pay cuts for employees. Further losses are projected as follows:

- **Hotel revenue: USD 511 million lost** as a result of cancellations and hotel closures
- Airline industry: **Passenger numbers projected to fall by 1.6 million passengers, leading to USD 320 million in lost revenues and putting 36,800 jobs at risk**
- MICE sector projected to lose KES 163.6 billion (USD 1.6 billion) in revenues
- **Almost half of tourism businesses have lost over KES 2.5 million (USD 23,500) in the first 6 months of 2020 due to cancellations**
- The government's Tourism Fund has lost KES 2.5 billion (USD 23.5 million) in levies
- Visitation to National Parks has dropped by 87%
- Livelihoods for communities dependent on tourism have been devastated

Kenya's wildlife resources play a vital role in contributing to the economy, locally and nationally. **Tourism is the most important wildlife economy activity generating 8-12% of GDP**, providing the third-largest source of foreign exchange earnings and employing a substantial number of people.

The Kenya government has injected KES 500 million (USD 4.7 million) to support the tourism industry, mitigate the impacts of COVID-19 and to create recovery pathways.

Case Study: KENYA

Contribution to the economy (pg268)

Tourism/ecotourism (Ecotourism includes non-consumptive tourism related to nature/wildlife.)

- Over 2 million tourists visited wildlife areas earning Kenya **USD 1.03 billion in 2019**, which contributes **approximately 1.1% of 2019 GDP Overall tourism contributed USD 1.54 billion in 2019.**
- Tourism provides employment for 1.6 million people (2019) representing 8.5% of the workforce.

Wildlife filming and photography

- Kenya has hosted over 80 internationally-acclaimed films and TV programmes
- The film industry contributes **USD 3.4 million** annually, about 0.003 % of 2018 GDP and employs 4,898 people
- 224 filming permits were issued for wildlife photography and filming earning KWS a paltry **USD 30,000**

Wildlife ranching

- Ranches increased from 180 at independence to 250 in 2019
- 45 ranches converted to private wildlife conservancies covering 1.4 million acres or 9% of the total area of all conservancies.
- Laikipia country – 48 commercial ranches covering 938,000 acres for wildlife and livestock use, generate **USD 37.6 million** annually

Protected Areas – 485 protected areas in total

Nationally Protected

- 23 National Parks, 31 National reserves, 4 Marine National Parks, 6 Marine National reserves, 4 Sanctuaries.
- **Totalling 71,005km² or 12% of the total land area.**
- Some of Kenyas protected areas have received global recognition for their conservation value ie Maasai Mara National reserve – recognised as Africas greatest wildlife reserve and a UNESCO Seven Wonders of the World.
- 6 Natural World heritage sites | 6 Designated Ramsar Sites

Community & Private Conservancies

- **Conservancies depend solely on tourism and donor funding for their operations (pg289)**
- Kenya has created **160 community and private conservancies covering 6.36 million hectares or 11% of total land area.** 76 community owned | 58 privately owned | remainder = group owned
- **Hold 65% of Kenyas wildlife lies outside protected areas on community and private lands** making them important for future expansion of wildlife management areas.
- Home to 72% of white rhino, 45% black rhino, 90% of worlds Grevy zebra population. Within Mara conservancies = up to 25% of Kenyas wildlife.
- Protection. of elephants poached for ivory in conservancies under NRT has declined 96% since 2012 because of increased security. ng the wildlife – **2,991 rangers.**

- Community & Private Conservancies **support over 707,460 households (2.8million people) and directly employ 5,000**
- **\$11.3m in tourism related bednight fees from Community Priavte Conservancies in 2019**

Wildlife

- 393 mammal species
- 1,105 bird species
- 362 freshwater & 407 marine fish
- More than 260 reptile / amphibian species
- 7,500 plant species
- Wildlife in Kenya has declined by an average of 68% in the last 40 years threatening the viability of the wildlife economy”
- This decline puts the future viability of the tourism industry in danger.
- Overall, this is attributed to people encroachment, poaching, livestock incursions, habitat degradation are some of the main threats.
- A bright spot for Kenya is Laikipia County where wildlife populations have declined by an average of only 7% over the 40-year period despite a remarkable increase in livestock numbers, probably due to wildlife management on commercial ranches and conservancies

Background: Maasai Mara Wildlife Conservancies Association (MMWCA) is a network of conservancies committed to protecting the Maasai Mara ecosystem and ensuring the prosperity of the local population. This unique community conservation model of smallholder land holdings aggregated into larger conservancy management units is playing a key role in protecting one of Africa's most important and high-value conservation landscapes, while generating significant revenues from wildlife tourism for local landowners.

The Maasai Mara is one of Africa's most important wildlife areas, home to a quarter of all of Kenya's wildlife and forming the key dry-season refuge for the Serengeti-Mara wildebeest migration constituting over two million large ungulates. This landscape is increasingly threatened by fragmentation and fencing, as formerly communal lands surrounding the Maasai Mara National Reserve – which provide critical habitat for wildebeest and other wildlife – have been transformed into individually-titled properties. In response to these threats, over the past decade landowners and tourism operators have joined together to form **15 conservancies that now cover roughly 140,000 hectares** of land in the Mara landscape, an area roughly equivalent to the size of the Maasai Mara National Reserve.

These conservancies are home to some of the best wildlife tourism experiences available anywhere in Africa.

State of Mara Conservancies Report 2019

- 15 conservancies cover 140,430 hectares (347,011 acres).
- Conservancies include 14,528 landowners and 39 tourism partners.
- The conservancy camps support lease payments amounting to over USD 4.9 million annually (2019), with an additional approx. USD 700,000 generated through employment as rangers in the conservancies.
- Approximately 25% of Kenya's total wildlife lives in the Maasai Mara.
- Number of jobs total approximately 2,000 in conservancies alone.
- Lion population densities are 14% higher in the Mara conservancies than in the Maasai Mara National Reserve.

In conservation terms, the Mara conservancies are playing a key role in protecting Kenya's most important wildlife and tourism area, and one of Africa's most spectacular – and economically valuable – wild landscapes. The conservancies provide critical seasonal habitat for the wildebeest migration as well as Kenya's largest lion population, as well as over 3,000 elephants. The key long-term threat to the Mara landscape is land fragmentation through fencing, land sales, and conversion to agriculture. The conservancies provide an incentive for landowners to maintain land as open, natural habitat, and have succeeded in converting agricultural lands back to wildlife habitat (e.g., Enoonkishu Conservancy) and in removing fences that were blocking wildlife and livestock movements (e.g., Pardamat Conservation Area). In this context, a key long-term challenge is ensuring that the economic model of the conservancies is robust and resilient. While the substantial tourism revenues in the Mara have been the foundation for the creation and growth of the conservancies, **the Covid-19 pandemic has, as of mid-2020, caused the loss of much of the estimated USD 7 million that conservancies were expected to receive.** MMWCA is working with a range of stakeholders and partners to develop and fund a mitigation plan that will keep conservancies functional until tourism revenues build back up to their previous levels.

The Covid-19 crisis has also illustrated the vulnerability of conservation models overly dependent on tourism as a single source of revenue. Despite the growth of the conservancies and considerable generation of tourism revenues from some of the highest value wildlife tourism land in Africa, the Covid-19 pandemic and the associated collapse of tourism in Kenya illustrates the importance of developing multiple different revenue streams from nature-based enterprises and the danger of overreliance on tourism.

Tourism is the biggest contributor to Rwanda's national export strategy (RDB, 2019). **For the last seven consecutive years, tourism has been ranked as the top foreign currency earner.**

Eco Tourism

- Total tourism revenue in 2019 was USD 498 million
- Total park revenue in 2019 was USD 28.5 million
- **10% of tourism revenue is shared with communities living around the parks** (USD 2.85 million in 2019)
- In 2017, Volcanoes National Park accounted for 38% of all visits and generated over 90% of all revenues (RDB, 2017). In 2019, with a total of 110,410 visits to the national parks, VNP again accounted for 91.7% of the USD 28,5 million generated. Gorilla trekking alone contributed to 50% of the revenue from VNP.
- **More than 80% of tourism in Rwanda is nature-based**
- The core product driving ecotourism growth is the gorilla trekking experience in Volcanoes National Park (VNP)
- According to the World Bank (2017), ecotourists account for just 2% of tourists but contribute 16% of revenues

Tourism in Numbers

Rwanda received a total of 1,632,000 international arrivals in 2019, up from 1,500,000 in 2017.

COVID-19 has also highlighted the risks associated with overreliance on one wildlife economy activity and

Overview of the wildlife economy in Rwanda

The political will in Rwanda is very strong and there is commitment from the government to grow the wildlife economy, to work with the private sector and to involve local communities.

- The principal wildlife economy activity in Rwanda is ecotourism, with gorilla tourism being the largest income-generating activity.
- During the COVID-19 pandemic, a heavy dependence on ecotourism has been shown to be risky.
- Rwanda is the second-fastest growing tourism economy in sub-Saharan Africa (WTTC, 2020)

The Tourism Revenue Sharing (TRS) Programme was initiated in 2005 by the Government of Rwanda. The programme aims to guide investment in the areas surrounding the various national parks. Initially, the Rwandan Tourism Revenue Sharing (TRS) Policy (2005) allocated at least 5% of Rwanda Development Board's (RDB) total annual gross tourism revenue to communities. In 2018-19, the Government of Rwanda increased the revenue share percentage from 5 to 10 percent. By 2018 the Programme had shared USD 5.3 million, supporting 690 community projects. In 2019, USD 2.85 million was shared with the community.

Theoretical total possible revenue (at 100% permit sales) from tourist activities in Volcanoes National Park in 2020 rates = \$53.8m.

Protected Areas:

- 5 protected areas (9.13% coverage)
- 4 national parks
- 9.13% terrestrial protected areas
- 1 Ramsar site (67.36 km² coverage)

Species Numbers:

- 293 amphibians and reptiles
- 139 mammals
- 703 birds
- Home to c.1/3 of the world's mountain gorilla

Conservation

26,338 km² land area
724,695 hectare forest area
53 forest nature reserves

Rwanda Tourism Revenue Sharing Programme

Tourism Revenue Sharing (TRS) Programme was initiated in 2005 by the Government of Rwanda. The programme aims to guide investment in the areas surrounding the various national parks.

Initially, the Rwandan Tourism Revenue Share (2005) allocated at least 5% of Rwanda Development Board's (RDB) total annual gross tourism revenue to communities (TRS) Policy.

In 2018-19, the Government of Rwanda **increased the revenue share percentage from 5 to 10 percent.**

Additionally, a Law enacted in 2012 resulted in the establishment of the Special Guarantee Fund, which insures people against wildlife damages, among other functions (Republic of Rwanda, 2020).

Between 2013 and 2017 the fund compensated 5,189 claims, with an additional 2,470 claims in 2018 (Ibid.). These claims were related to wild animals' damage to crops, livestock killed, as well as people injured or killed. From **2016-2018, approximately USD 590,000 was paid as compensation** (Ibid.).

Through the TRS programme, communities have been able to access **clean drinking water, health centres, classrooms and decent housing projects ranging from environmental protection, education, water and sanitation, basic infrastructure and food security.**

The cumulative amount shared by 2018 was USD 5.3 million, supporting 690 community development projects (Republic of Rwanda, 2020). The government has committed to a budget of about USD 22 million towards tourism development activities for the duration of the Tourism Policy, from 2009 to 2020. Three parks have traditionally been the main revenue earners for the TRS programme: Volcanoes National Park, Akagera National Park and Nyungwe National Park. Given the unequal distribution of revenues earned in the three national parks, and in the interest of decentralising benefits, the benefit share is combined into a national pool from which funds are distributed according to a predefined ratio. Since 2019, the distribution is 35%, 25%, 25% and 15% in Volcanoes, Nyungwe, Akagera and Gishwati-Mukura respectively (T Ngoga 2020, pers. comm., 28 Oct).

In 2019, revenue shared with the community amounted to USD 2.85 million, largely due to the increase in the cost of a gorilla permit from USD 750 to USD 1,500 per person (RDB, 2020). Aims to guide investment in the areas surrounding national parks By 2018 the Programme had shared USD 5.3 million, supporting 690 community projects In 2019, USD 2.85 million was shared with the community

Contribution to the economy

Eco Tourism

Total contribution (both direct and indirect) of **travel & tourism in 2019 was \$24.6bn** (7% of total economy).

Provided 1.4m jobs (9.1% of total employment)

1 in 22 South Africans are employed in the tourism sector (including those unrelated wildlife)

64% of visitors are wildlife tourists equating to \$6.3bn in 2017. This is likely to be over estimate as tourists also include those visiting family and friends. However, even if the percentage is halved, the value of wildlife tourism is still substantial at USD 3.15 billion.

Total visitor spend in 2019 was \$9bn. Of this total, **64% comprised leisure spending** (USD 5.76 billion) and **55% covered domestic spending**

According to the Department of Tourism (2019), there were a total of 10.5 million tourist arrivals to South Africa in 2018, \$6.2 billion in direct spend by international tourists. The TSA found that domestic tourism contributed more to internal tourism expenditure than inbound tourism. According to SA Tourism, total domestic tourism excursions trips amounted to 17.7 million in 2018 (Department of Tourism, 2019). Although domestic spend is lower, the number of domestic trips also highlights the importance of the domestic tourism market to the economy. The importance of the domestic market has been further highlighted by the COVID-19 pandemic.

Wildlife ranching (breeding)

Private sector is allowed to own wildlife on private lands leading to an increase in game ranches & growth in wildlife economy. Estimated 8,979 wildlife ranches in SA. In 2014 the direct contribution of wildlife ranching was c.\$438m. 52% of ranches engage in multiple economic activities

Protected Areas – 485 protected areas in total

- 1,224,385km² conservation land area
- 224,640km² marine and coastal area protected
- 53 forest nature reserves
- 1,611 protected areas (8.63% coverage)
- 22 National Parks
- 39 Marine protected areas (14.56%)
- 8,48 terrestrial protected areas
- 5 Natural World Heritage Sites
- 23 Ramsar Sites
- 9 UNESCO MAB-Biosphere reserves
- 6 Transfrontier Parks / Conservation Areas

- Wildlife can be owned by private sector
- Numerous layers of complexity in terms of management of, and legislation related to, the wildlife economy

Wildlife

South Africa is one of the most biodiverse countries in the world due to its species diversity, rate of endemism and diverse ecosystems (SANBI, 2019). With just 2% of the world's land area, it has **10% of the world's plant species** and **7% of its reptile, bird and mammal species.**

- 336 mammals
- 732 bird
- 404 reptile
- 13,000 marine
- 125 amphibian and 658 freshwater fish species

As was found in all the case studies, data related specifically to ecotourism was difficult to disaggregate from total tourism data. This section attempts to provide information based on South African National Parks tourism statistics and other ecotourism statistics found.

Tourism related to biodiversity generated direct spend of ZAR 31 billion / USD 2.4 billion in the South African economy in 2015, with domestic tourism accounting for 52% of this demand (ZAR 16 billion / USD 1.3 billion) and foreign or inbound tourism for 48% (ZAR 15 billion / USD 1.2 billion). The direct contribution to GDP in 2015 was ZAR 14.8 billion / USD 1.2 billion (0.4% of GDP). Tourism related to biodiversity also accounted for more than 88,000 direct jobs (12% of direct tourism jobs) in 2015 and accounted for more than ZAR 1 billion / USD 78 million of taxes on products (Joubert & Poole, 2018). In 2016, 14% of all tourism activities undertaken by foreign tourists whilst visiting South Africa incorporated a biodiversity asset, while 45% of tourists from Europe and the Americas participate in biodiversity related activities and attractions.

Coastal tourism contributed an estimated ZAR 26 billion / USD 2.7 billion to South Africa's national income (2013)

OXFORD ECONOMICS STATISTICS



KENYA		2018	2019	2020	2019 v 2020	2021	2022	2023
Air Inbound Transportation	(US\$bn)	0.73	0.79	0.16	- 80%	0.25	0.35	0.48
Direct T&T contribution to employment	000's	450.19	452.9	208.34	- 46%	276.97	345.24	405.91
Direct T&T % contribution to employment	%	2.6	2.5	1.2	-48%	1.51	1.81	2.04
Direct T&T % contribution to GDP	%	2.75	2.68	1.27	-47%	1.67	1.97	2.19
Direct T&T contribution to GDP	(US\$ bn)	2.42	2.56	1.26	-49%	1.68	2.09	2.46
Leisure arrivals	000's	1127.31	964.89	259.87	-34%	431.071	570.94	724.52
Leisure Inbound Travel (international spending)	(US\$ bn)	1	0.89	0.3	-67%	0.4	0.55	0.7

NAMIBIA		2018	2019	2020	2019 v 2020	2021	2022	2023
Air Inbound Transportation	(US\$bn)	0.11	0.09	0.03	-67%	0.04	0.05	0.06
Direct T&T contribution to employment	000's	38.15	42.95	26.02	-40%	38.16	41.96	42.49
Direct T&T % contribution to employment	%	5.22	5.75	3.57	-38%	5.1	5.41	5.32
Direct T&T % contribution to GDP	%	5.78	6.5	3.95	-39%	5.18	5.71	6.01
Direct T&T contribution to GDP	(US\$ bn)	0.79	0.82	0.41	-50%	0.63	0.74	0.83
Leisure arrivals	000's	569.8	553.95	172.45	-69%	302.85	399.1	496.69
Leisure Inbound Travel (international spending)	(US\$ bn)	0.37	0.32	0.1	-69%	0.16	0.21	0.26

OXFORD ECONOMICS STATISTICS



RWANDA		2018	2019	2020	2019 v 2020	2021	2022	2023
Air Inbound Transportation	(US\$bn)	0.15	0.17	0.06	-65%	0.09	0.11	0.14
Direct T&T contribution to employment	000's	114.28	137.4	59.12	-57%	81.51	103.04	118.64
Direct T&T % contribution to employment	%	3.72	4.31	1.87	-57%	2.44	2.93	3.23
Direct T&T % contribution to GDP	%	4.04	4.65	2	-57%	2.56	3.08	3.48
Direct T&T contribution to GDP	(US\$ bn)	0.39	0.47	0.2	-58%	0.29	0.38	0.47
Leisure arrivals	000's	66.38	70.68	25.05	-65%	39.77	50.90	61.05
Leisure Inbound Travel (international spending)	(US\$ bn)	0.24	0.31	0.12	-62%	0.17	0.22	0.27

SOUTH AFRICA		2018	2019	2020	2019 v 2020	2021	2022	2023
Air Inbound Transportation	(US\$bn)	79.88	78.36	44.34	-44%	60.67	73.65	85.69
Direct T&T contribution to employment	000's	763.87	751.38	355.71	-53%	445.04	550.9	638.07
Direct T&T % contribution to employment	%	4.66	4.6	2.35	-49%	2.8	3.34	3.81
Direct T&T % contribution to GDP	%	2.76	2.67	1.45	-46%	1.7	1.99	2.24
Direct T&T contribution to GDP	(US\$ bn)	10.15	9.37	4.32	-54%	5.89	7.16	8.35
Leisure arrivals	000's	14541.5	14390.06	4132.97	-72%	5475.78	8737.83	11655.8
Leisure Inbound Travel (international spending)	(US\$ bn)	7.53	7.01	2.15	-70%	2.88	4.16	5.58

OXFORD ECONOMICS STATISTICS



ZAMBIA		2018	2019	2020	2019 v 2020	2021	2022	2023
Air Inbound Transportation	(US\$bn)	-	-	-	-	-	-	-
Direct T&T contribution to employment	000's	146.95	177.31	97.52	-45%	126.43	148.12	162.71
Direct T&T % contribution to employment	%	2.32	2.74	1.54	-44%	1.96	2.23	2.39
Direct T&T % contribution to GDP	%	2.49	3.11	1.73	-45%	2.31	2.57	2.71
Direct T&T contribution to GDP	(US\$ bn)	0.67	0.72	0.33	-54%	0.43	0.51	0.56
Leisure arrivals	000's	291.47	319.37	110.18	-66%	212.44	295.56	360.34
Leisure Inbound Travel (international spending)	(US\$ bn)	0.32	0.35	0.18	-49%	0.24	0.28	0.3

ZIMBABWE		2018	2019	2020	2019 v 2020	2021	2022	2023
Air Inbound Transportation	(US\$bn)	-	-	-	-	-	-	-
Direct T&T contribution to employment	000's	64.62	58.78	34.64	-42%	49.11	56.36	59.59
Direct T&T % contribution to employment	%	3.07	2.82	2.12	-25%	2.79	3.04	3.06
Direct T&T % contribution to GDP	%	2.14	2.14	1.56	-28%	2.1	2.26	2.32
Direct T&T contribution to GDP	(US\$ bn)	0.52	0.52	0.24	-54%	0.34	0.41	0.46
Leisure arrivals	000's	1354.26	1313.86	347.83	-74%	679.44	1002.33	1234.9
Leisure Inbound Travel (international spending)	(US\$ bn)	0.11	0.11	0.03	-70%	0.05	0.07	0.09