

Country Summary
Report: SOUTH AFRICA,
APRIL 2022

AFRICAN
NATURE  BASED
TOURISM PLATFORM

SOUTH AFRICA





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SURVEY OVERVIEW: The African Nature-Based Tourism platform has developed a survey to assess the degree to which local communities and small and medium enterprises (SMEs) in the nature-based tourism sector are being impacted by COVID-19. The target audience is community members and SMEs who support the tourism value chain, as suppliers of tourism goods and services, and their associated enterprises, such as lodges, vehicle hire, guiding services, shops, etc. The questions seek to better understand their involvement in conservation and tourism, how the COVID-19 pandemic has affected them, and what their resulting needs are.

These reports present a summary for each country, including an analysis of qualitative data collected through the surveys, and certain quantitative data. The surveys are however more comprehensive than the data presented in these summary reports, so please be sure to visit <https://naturebasedtourism.africa/data> to explore more of the data, and register to access the database for full survey results.

All photographs by Nikhil Advani





INTRODUCTION

SOUTH AFRICA OFFERS A DIVERSE RANGE of tourism attractions and activities including adventure, culture, nature-based tourism, rural and township tourism, sports and wine (DGCIS, 2020). Some of the most famous attractions are Kruger National Park (Brett, 2018), the Western Cape beaches and wine lands, craggy cliffs at the Cape of Good Hope, forests and lagoons along the Garden Route, and the city of Cape Town, which sits beneath flat-topped Table Mountain (Bickford-Smith V, 2009). In 2019 the Travel and Tourism sector's total contribution to the country's GDP was 6.7%, equivalent to USD \$22.1 billion, and contributed 1.5 million jobs (WTTC, 2021). Like most countries, the COVID-19 pandemic travel restrictions affected the sector and dropped the GDP contribution to 3.7% and jobs to 987,000 (WTTC, 2021).

The African Nature Based Tourism Platform worked with Africa Ignite. Africa Ignite is a rural development NGO with an extensive rural footprint, partnering with communities so that they can participate fairly and equally in the economy and society and make their voices heard. The organization helps marginalized rural communities (with a focus on women, youth and children) to earn a decent living, develop sustainable enterprises, learn usable skills, tell their stories, protect their health and environment, improve the quality of their education, and ultimately improve their quality of life.

SURVEY LOCATIONS

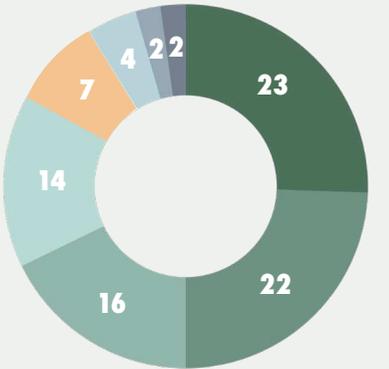
SURVEYED TOURISM ENTERPRISES IN SOUTH AFRICA





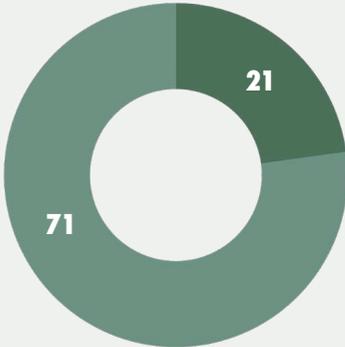
SURVEY RESULTS

PRIMARY INVOLVEMENT OF THE ENTERPRISE IN NATURE-BASED TOURISM



23 sale of goods to tourists	22 guiding/tours /excursions	16 other	14 privately owned lodging
7 null	4 community owned lodging	2 private conservancy	2 community conservancy

ENTERPRISE OWNERSHIP



71 private	21 community
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STAFFING BEFORE THE COVID-19 PANDEMIC VS. CURRENT STAFFING

92

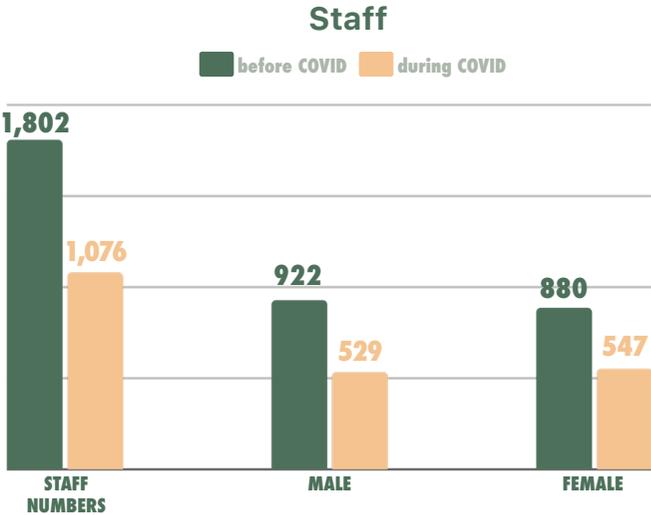
SURVEYED ENTERPRISES

1,802

TOTAL STAFF BEFORE COVID-19

1,076

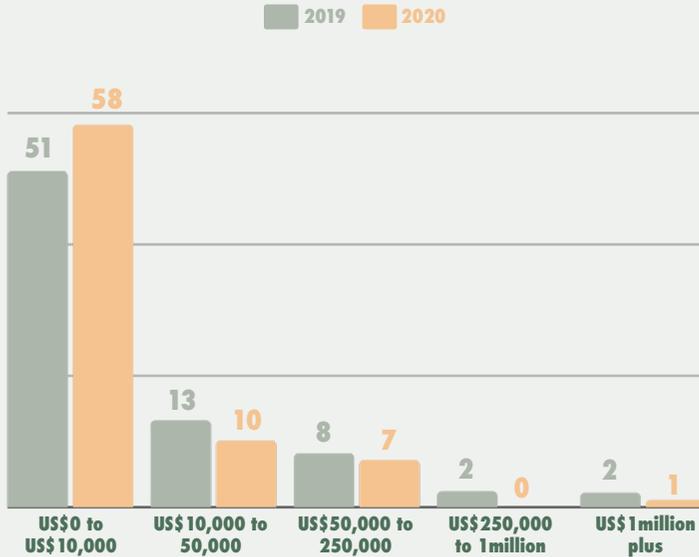
TOTAL STAFF CURRENTLY



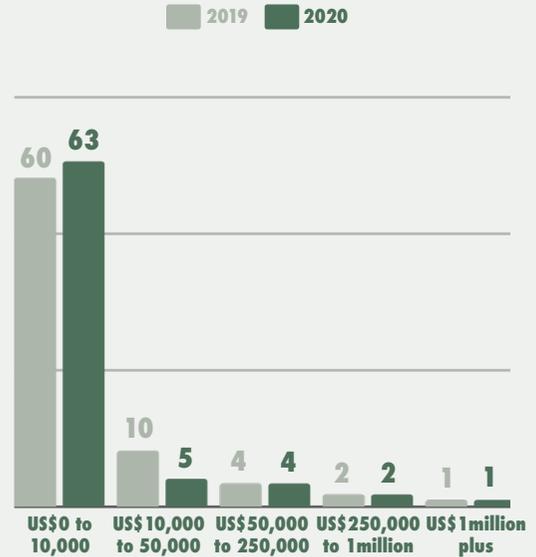


TOTAL ANNUAL GROSS REVENUE (income from selling goods and services before any deductions) THAT SURVEYED ENTERPRISES GENERATE FROM TOURISM

ANNUAL GROSS REVENUE 2019 VS 2020



ANNUAL SALARY COST 2019 VS 2020



QUALITATIVE SURVEY QUESTIONS

CONTRIBUTIONS TO CONSERVATION (the role of the community/enterprise in the management and custodianship of the land and its wildlife, including any distinguishing features about the area, its wildlife, its people and the role of tourism in its local economy)

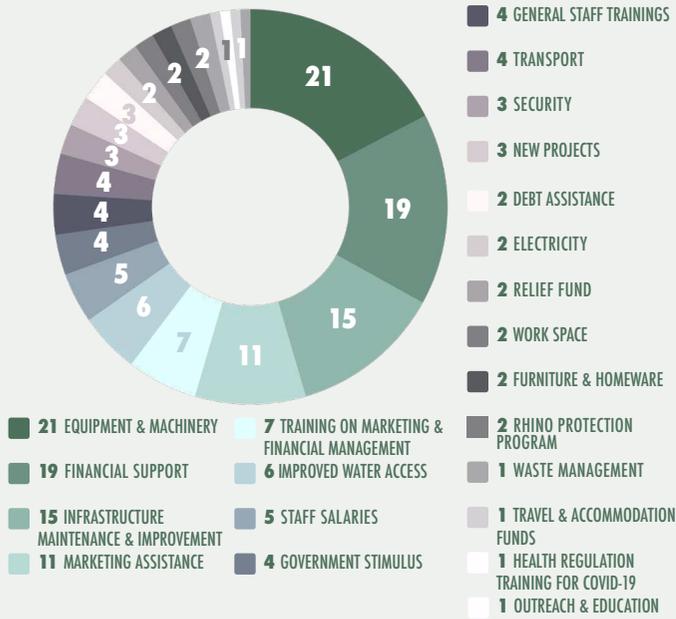
CONTRIBUTIONS TO CONSERVATION



ONE OF THE MAIN WAYS that enterprises in South Africa are contributing to conservation efforts is through education and outreach. This doesn't simply mean educating tourists, but investing in the local communities by hiring community members and then training them with the skills and information needed to become guides and advocates for environmental protection in their own right. Several enterprises noted that through these efforts they've seen a snowball effect, where current guides are now encouraging and educating community youth to become guides and conservationists. This investment in the local economy and cultural preservation leads to pride in the surrounding area, and the organization of activities such as beach clean ups. The importance of creating partnerships with local communities was also emphasized through one enterprise's "conservation before profit" program, where 1.5% of every guest's stay at their lodges goes to conservation and community projects. In some years, they reported that this can mean up to 40% of their profit goes to the communities.



SUPPORT THAT THE INSTITUTIONS NEED



THE MAIN AREA OF SUPPORT requested was in the provision of equipment and machinery. There were many requests for sewing machines and materials such as cotton, linen, leather, wool, and mannequins, as well as for field supplies like gps, binoculars, telescopes, and mobile phones. There was also a need for regular office supplies like stationery and computers, PPE for COVID-19 prevention measures, working tools (drills, grinders, etc.) and the need for larger infrastructure improvements like toilets, generators, showers, boreholes for water, and fencing. Funds were also requested for staff trainings in marketing and financial management.

ALTERNATIVE NATURE-FRIENDLY SOURCES OF REVENUE, BEYOND TOURISM, THAT THE ENTERPRISES WOULD BE INTERESTED IN EXPLORING



MOST ENTERPRISES EXPRESSED INTEREST in a diverse array of alternatives to tourism. Agriculture remains a star performer in South Africa’s economy (DALRRD, 2020) which explains the frequency of agriculture-related alternatives that many enterprises indicated. The education and skills development alternatives are more aligned with the expressed interest in investing in local youth, and the potential for manufacturing jobs. Alternatives to tourism covered a wide range and were very enterprise-specific depending on which sectors each enterprise has had exposure to.



ALTERNATIVE SOURCES OF REVENUE ENTERPRISES WOULD BE INTERESTED IN EXPLORING

7 EDUCATION & SKILLS DEVELOPEMTN	2 FARMING	1 BIO-PROSPECTING FOR MEDICINAL PLANTS
5 POULTRY	2 TOUR GUIDE ACADEMY	1 SOLAR POWER
4 HORTICULTURE (ORGANIC)	2 TRANSPORT	1 CARPENTRY
4 CRAFTS	2 LEASING & ACCOMMODATION	1 BIO-CHARCOAL
4 RESTAURANT & CATERING	2 START NGO	1 SELL PLANTS & SEEDS
3 RECYCLING	2 AQUACULTURE & AQUAPONICS	1 GAME RESORTS
3 TAILORING	1 POTTERY	

OTHER COMMENTS

A NUMBER OF ENTERPRISES EMPHASIZED how rural communities were dependent on tourism for their livelihoods as well as community development. This was followed by the need for the government to provide both financial and technical support to enterprises to establish other revenue streams as well as to cushion the effects of the COVID-19 pandemic. Enterprises also indicated how they lack expertise or capacity to market their institutions and the services they provide and such training would be of great benefit. Tourism infrastructure maintenance and rehabilitation was another topic raised, along with the establishment of marketplaces for different goods and services within the communities.