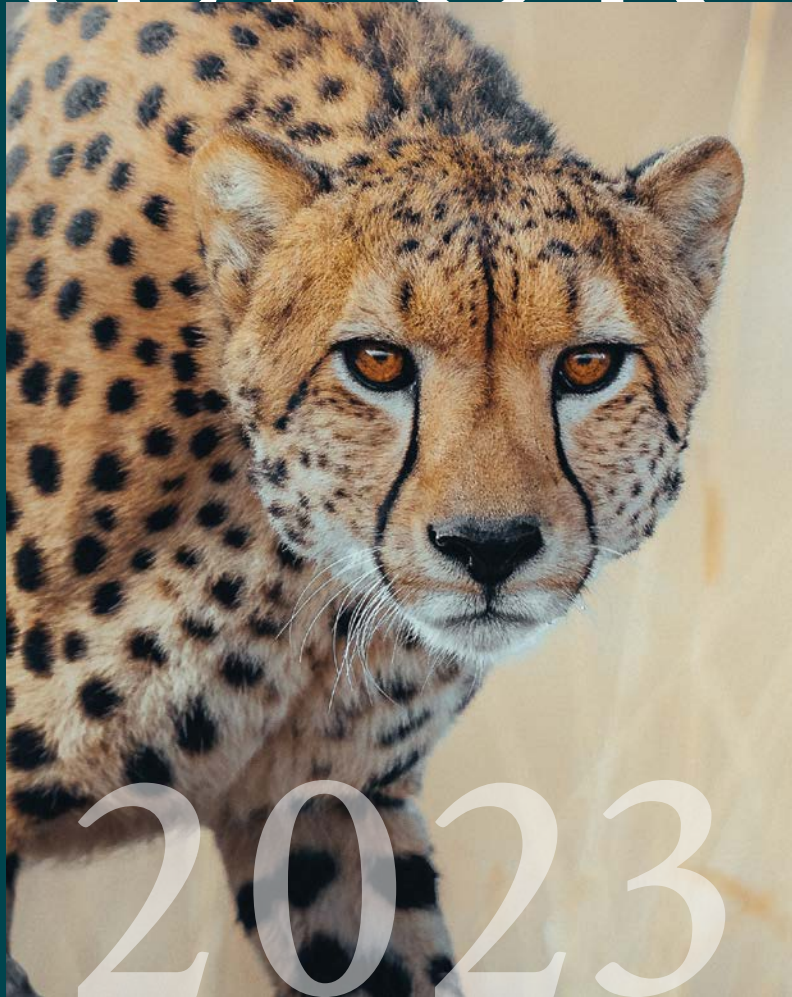


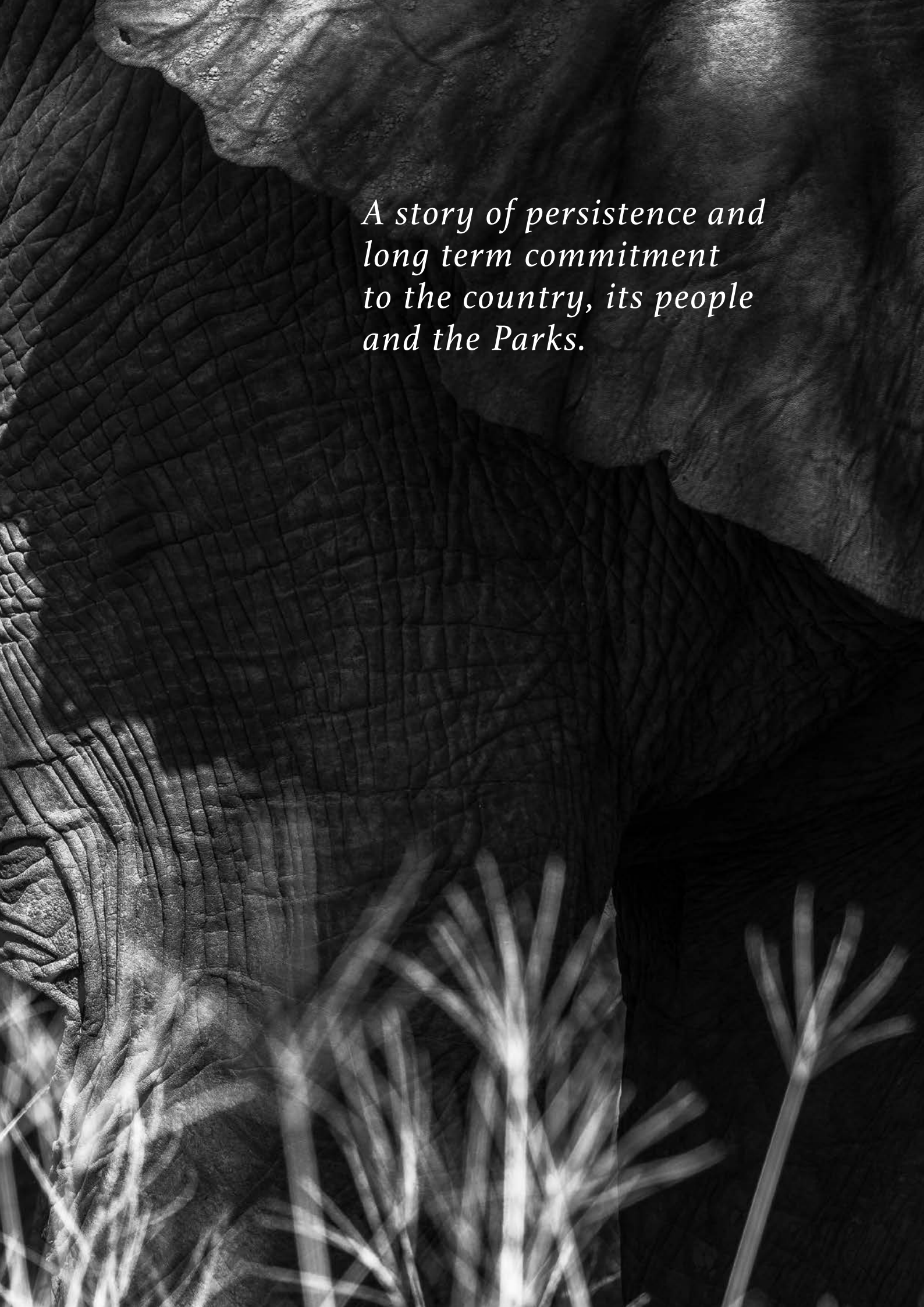
IMPACT REPORT



WILDERNESS

ZIMBABWE





*A story of persistence and
long term commitment
to the country, its people
and the Parks.*



ABOUT THIS REPORT

This report is produced as the Wilderness Group celebrates its 40th anniversary. Operations in Zimbabwe commenced later but have still spanned more than 30 years. It is aimed at stakeholders in Zimbabwe and intended to inform them about the role and impact of this business.

The data in this report relate primarily to Wilderness Safaris Finance and Investment Company (Private) Limited, Wilderness Safaris Zimbabwe (Private) Limited and their subsidiaries. It does not include data relating to the Wilderness Group and operations in eight other countries.

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CEO'S LETTER





2023 marks the 40th year of operations of the Wilderness Group. The business in Zimbabwe commenced a few years later but still spans more than three decades. These are significant milestones and we have much to celebrate. We look back with pride over the achievements of this period and the monumental changes to the business that have occurred. We are particularly gratified by the fact that so many facets of our business have been emulated by other businesses in Zimbabwe, and in other countries, too. We are also proud of the long-term commitment that we have shown to conservation, communities and the economy in Zimbabwe, despite some very difficult years. The country enjoys an enthusiastic and loyal following in Africa's intensely competitive safari industry and this is testament to the foundations that were laid so long ago and have been constantly refined since then. This would make the many people who have worked in our business very proud.

On this 40th anniversary, we have been gratified by the public and market reaction to the rebranding launched during the latter part of 2022. We believe this will stand us in good stead as the industry returns to normal after more than two very trying years inflicted by the Covid-19 pandemic.

This new branding also is important in the context of Wilderness' development of new channels to market, giving us direct access to consumers, while at the same time retaining and strengthening the long-standing ties that we have enjoyed for decades with our valued trade partners.

It is important, at this time, to pay tribute to the commitment to Wilderness Zimbabwe, and the understanding that was so strongly displayed, by our guests, staff, suppliers, financiers and shareholders during the pandemic. We have weathered many storms during the long life of Wilderness, but the pandemic far exceeded all previous disturbances in the scale and severity of the impact. We have been particularly humbled by how supportive our people have been despite the uncertainty and long periods when we had to close our doors. Shoulder to shoulder we have got through the worst of it and, for that, we have to say thank you.

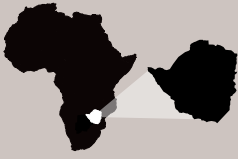
Siyabonga, Tintotenda

Keith Vincent
Group Chief Executive Officer

OUR FOOTPRINT



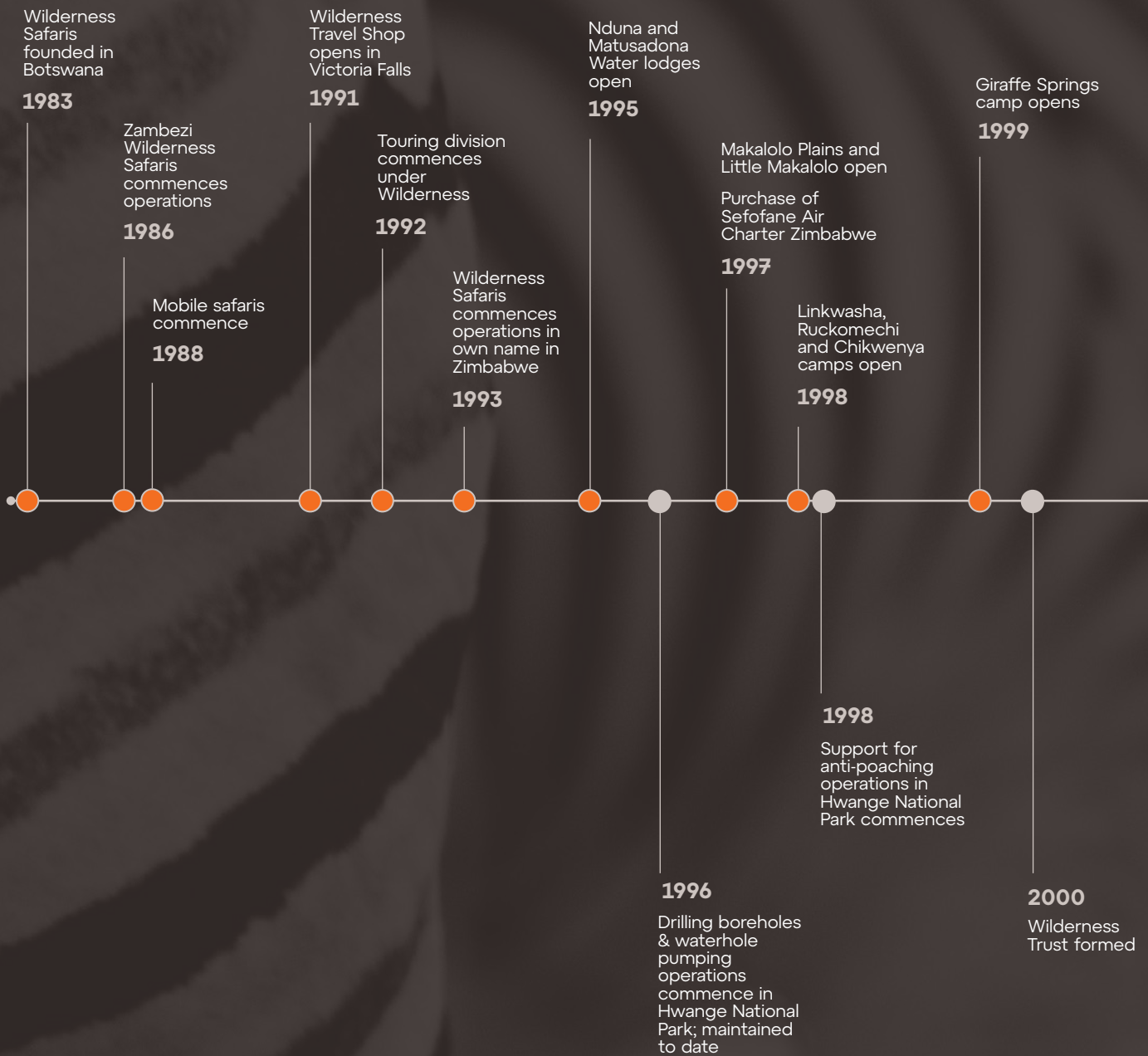
ZIMBABWE

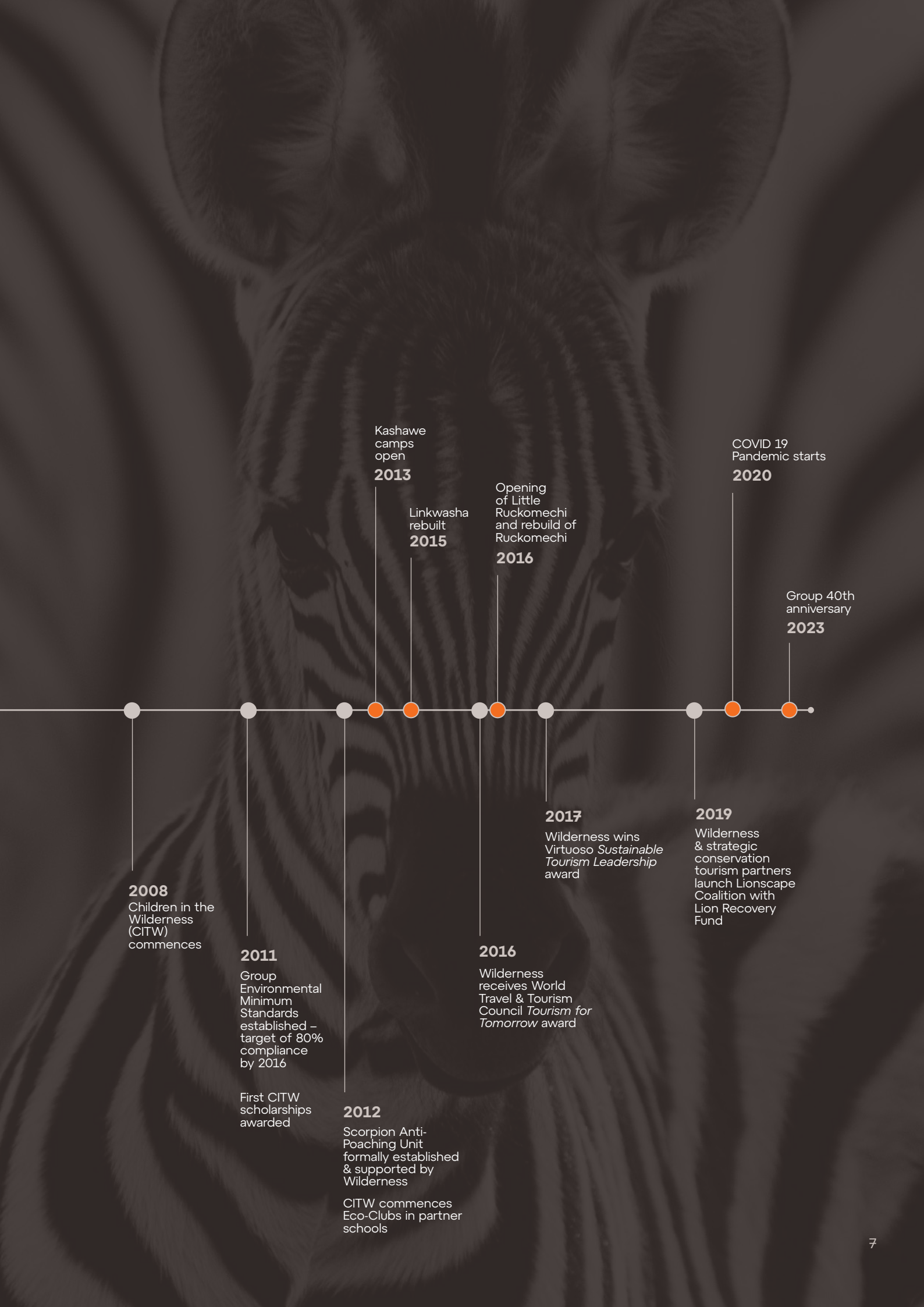


- ✈ Airport
- City/Town
- Wilderness Office
- Wilderness Camp
- Wilderness Associated Camp

OUR HISTORY

When the Company was formed in 1983, we commenced an exciting journey of discovery and learning. On this journey, we have reached numerous important business and impact milestones, the most important being illustrated here. We are particularly proud that many of these milestones have become precedents for the industry as a whole, and not just our own organisation.





2008
Children in the Wilderness (CITW) commences

2011
Group Environmental Minimum Standards established – target of 80% compliance by 2016

First CITW scholarships awarded

2012
Scorpion Anti-Poaching Unit formally established & supported by Wilderness

CITW commences Eco-Clubs in partner schools

Kashawe camps open
2013

Linkwasha rebuilt
2015

Opening of Little Ruckomechi and rebuild of Ruckomechi
2016

2017
Wilderness wins Virtuoso Sustainable Tourism Leadership award

2016
Wilderness receives World Travel & Tourism Council *Tourism for Tomorrow* award

2019
Wilderness & strategic conservation tourism partners launch Lionscape Coalition with Lion Recovery Fund

COVID 19 Pandemic starts
2020

Group 40th anniversary
2023

ZIMBABWE

AT A GLANCE

2014 TO 2023

For every \$1 advanced to the business by its shareholders, over the last 10 years Government has earned \$2 and our staff have been paid \$4.



2.5

persons
employed per
guest bed

350

people employed

more than

\$4

million paid to
staff per annum

Only

I

expatriate
employee

\$46

million spent in the
local economy on
purchases of goods
and services



\$7.4

million paid in
concession and
park fees

more than

\$17

million paid to
Government

53,000

guests hosted, for more than
160,000 bed nights





\$11.6

million in capital expenditure

\$8.6

million advanced to the business by the shareholders

\$0

dividends paid to shareholders

for every

\$1

lent to the business by shareholders, Government has been paid \$2 and staff \$4

more than

\$281

million in sales to third party (competitor) tourism products



474

children have participated in CITW programmes in Wilderness camps

Up to

1,200

children participating in 40 school Eco-Clubs annually

\$675,000

invested in community projects and programmes

4085

bursaries, worth \$607,000, awarded

OVERVIEW OF THE WILDERNESS BUSINESS

Wilderness is now the largest business of its kind in Africa, with operations in nine countries, as well as offices in the USA, UK and Mauritius, but it had its roots in Botswana in 1983. The first Wilderness-linked businesses commenced operations in Zimbabwe three years later. At the time, the business comprised mobile overland safaris between Zimbabwe and Botswana and the first permanent Wilderness-owned camps were not opened until the mid-1990s.

Over time, the business transitioned into one dominated by permanent camps in Hwange and Mana Pools National Parks, supported by air and ground transfer services and a tour operating office in Victoria Falls. Wilderness pioneered this conservation tourism business model in Zimbabwe and elsewhere, and it has subsequently been replicated by many competitors the world over. Today, Victoria Falls and Kariba are thriving and busy centres serving a massive tourism and hospitality industry.

From these humble beginnings in Botswana and Zimbabwe, Wilderness gradually expanded into the rest of southern Africa. Over time, it has evolved into a specialist luxury hospitality and conservation business. The Group now owns and operates 60 safari camps and lodges across Africa, hosting more than 40 000 guests per annum. Of these, eight camps are in Zimbabwe, hosting nearly 7 000 guests per annum, pre-Covid.

The scale of this business is amply illustrated by the following graph. Cumulatively, it has itself hosted 160 000 bednights over the last 10 years, but also sold a further 5 500 bednights into associated camps*. The graph also illustrates the catastrophic impact that the Covid pandemic had on tourism and our business, with sales declining to almost nothing in FY21 (calendar year 2020) and a fraction of normal in FY22.

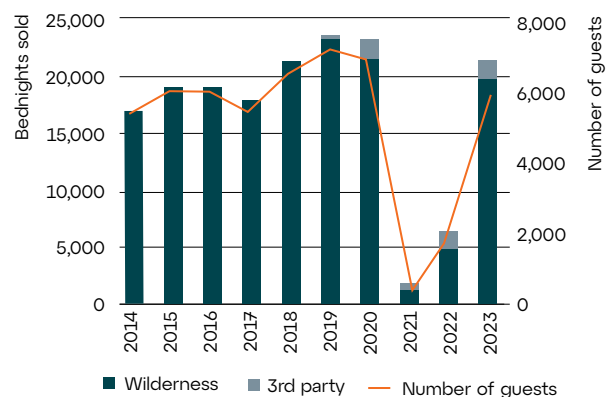
*Defined as camps for which we have a management and/or marketing/sales agreement.

Had these been normal years, numbers of bednights sold by Wilderness over the last 10 years would have exceeded 200 000.

To host these guests, a network of eight camps, comprising just under 158 beds in total, has been built and operated across the northern and western parts of the country. These are serviced by a fleet of two aircraft that transport guests, staff and fresh supplies to, and from, the camps.

Wilderness Zimbabwe is run through a network of Zimbabwe-registered companies, of which Wilderness Safaris Zimbabwe (Private) Limited is the main operating entity (see Business Structure on page 12).

Figure 1: Bednights sold and guest numbers

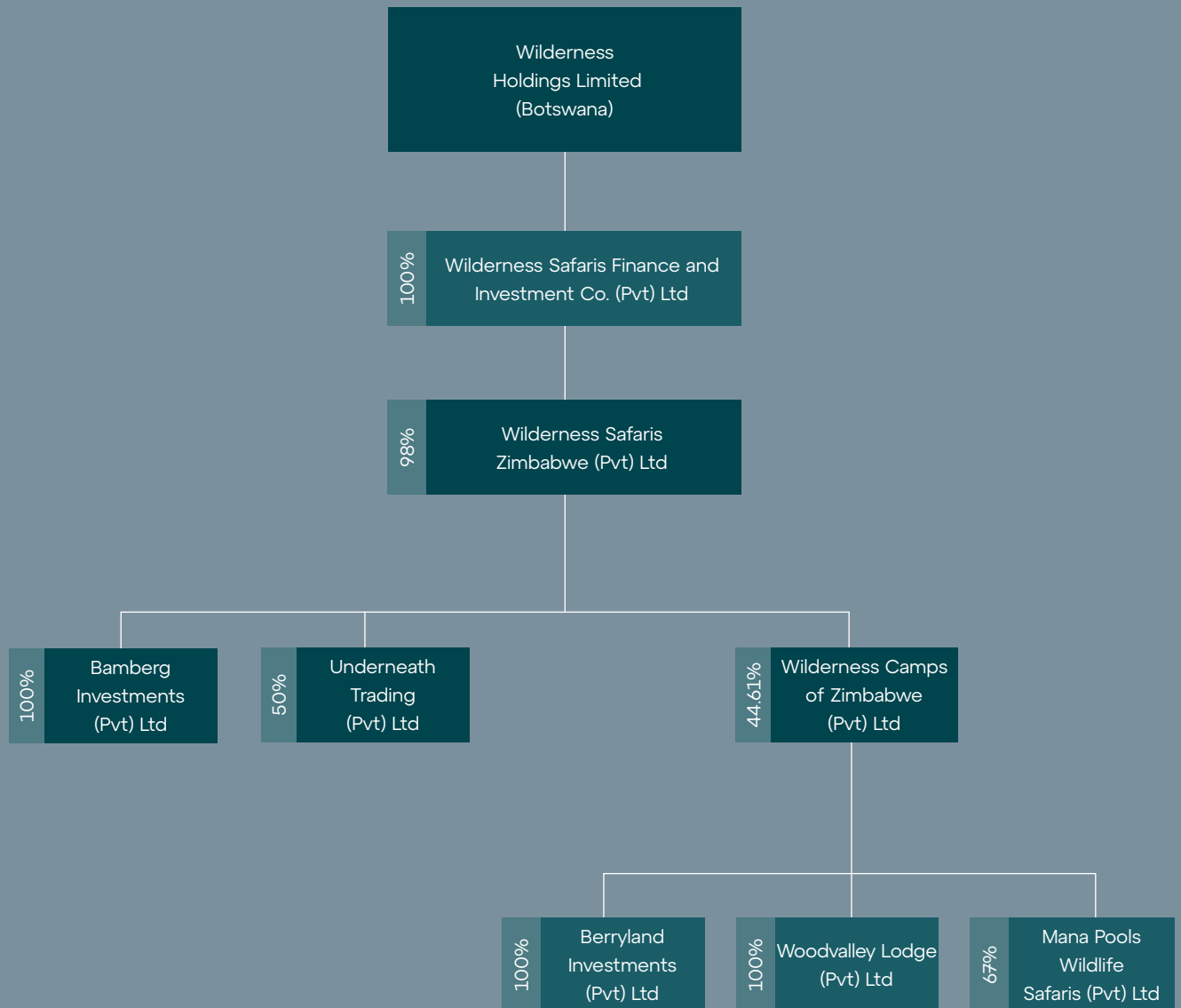


*Wilderness has
evolved into a
specialist luxury
hospitality and
conservation
business.*

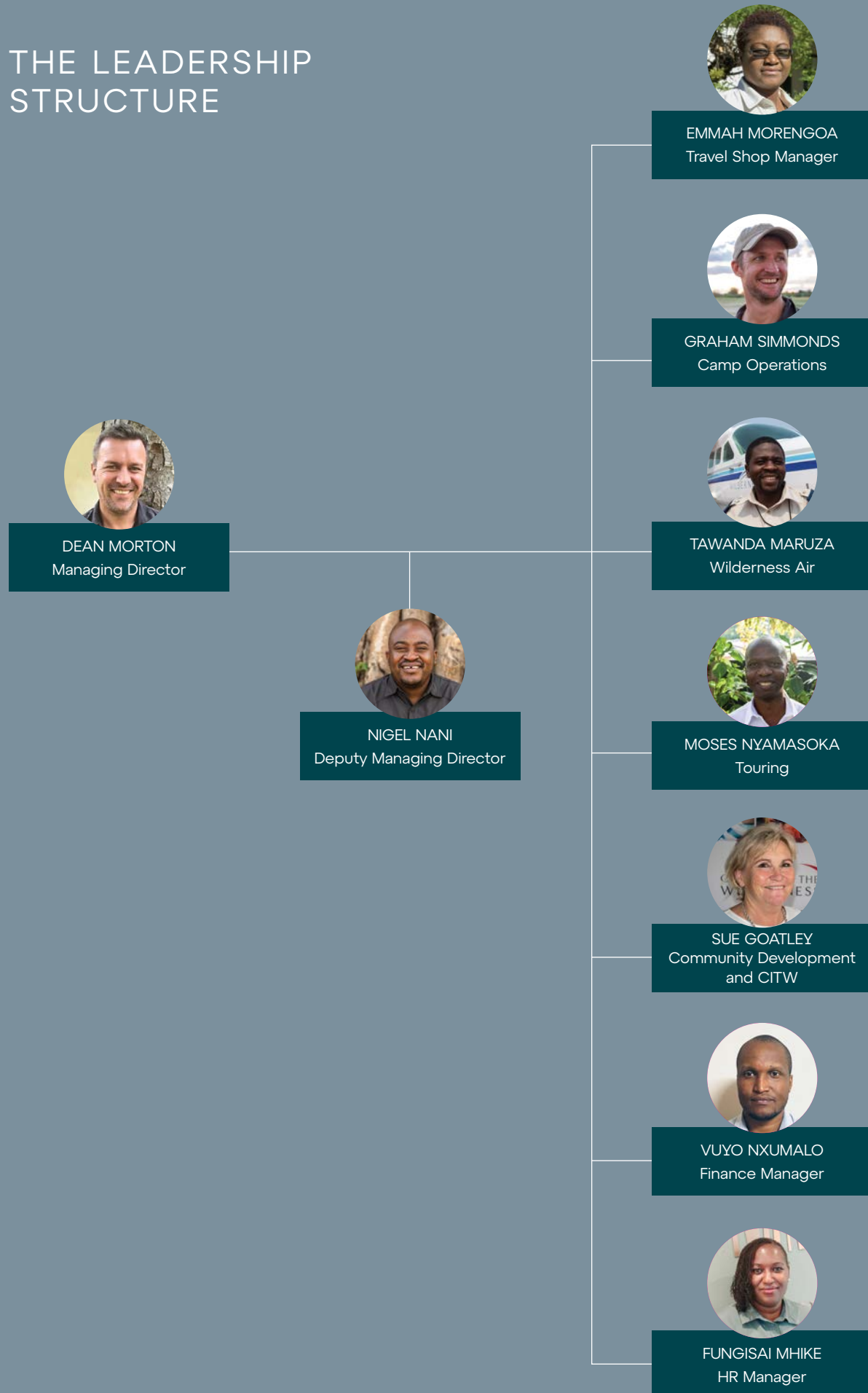


ZIMBABWE BUSINESS STRUCTURE

The business is run through a network of Zimbabwe-registered companies of which Wilderness Safaris Zimbabwe is the main operating entity.

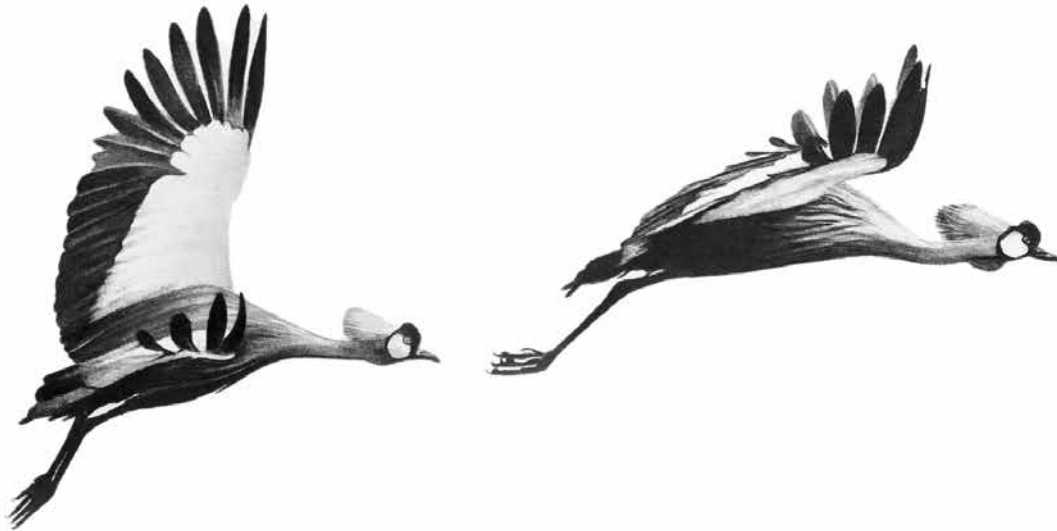


THE LEADERSHIP STRUCTURE









IMPACTS ON THE ECONOMY OF ZIMBABWE

Wilderness Zimbabwe has many positive impacts on Zimbabwe's economy and on Government revenue. Some of the more important indicators of these impacts are discussed in this section.

Firstly, Wilderness pays Government for taxes and licenses of various kinds, as well as leases of concessions in the national parks. These have totalled nearly USD17 million over the last 10 years, peaking at USD3 million during FY20 alone, see figure 2. It is critical to note that, over the same period, no dividends at all have been paid to shareholders: instead, the shareholders of the business have contributed a net of USD8.6 million in loans to finance operating losses and capital expenditure. This means that, for every USD2 paid to Government over the last 10 years, shareholders have **contributed** USD1 to the business, without any return. (It is further important to note that this situation has persisted almost uninterrupted since 2000.)

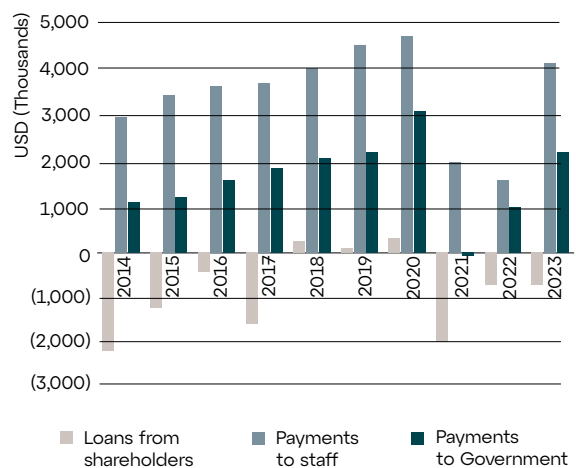
Once again, the impact of Covid can be seen from the fact that payments to Government during FY21 slumped to zero, down from USD3 million the previous year. The Covid crisis also exacerbated the

business' needs for shareholder funding and USD3.5 million was injected by them into the business between 2021 and 2023.

Salaries paid to staff are also an important contributor to the economy and are dealt with in figure 8.

Wilderness also makes significant purchases of goods and services from suppliers in Zimbabwe. These have amounted to USD46 million over the last 10 years, having peaked at nearly USD6 million per annum in 2020 (see figure 3). The extent to which these local purchases have to be supplemented by imports has varied over time, depending on the

Figure 2: Payments to/(funding from) stakeholders



state of the local economy, currency shortages, etc. Historically, local purchases amounted to 70% to 80% of all purchases, but the levels of imports have increased more recently owing to local supply constraints. Needless to say, all of these local suppliers employ staff, pay taxes, etc., adding to the multiplier effects down the value chain.

It is also important to note that almost all of the turnover of this business is generated in hard currency. Given the currency shortages plaguing Zimbabwe's economy, this foreign currency generation is a most important impact.

The levels of investment in Zimbabwe by the group are best illustrated by figure 4, which shows capital expenditure in Zimbabwe over the 10 year period.

These have totalled USD11.6 million, having peaked at USD2.5 million in 2017.

A notable further economic and industry impact arises from the fact that Wilderness travel shops in Zimbabwe and elsewhere also make sales to third party (competitor) products in the country. Over the last 10 years, these sales have been worth USD28 million, peaking at more than USD5.5 million during the most recent financial year.

It is worth noting that many of these sales are made to our competitors and that we are major suppliers of business to them.

Figure 3: Purchases of goods and services from local suppliers

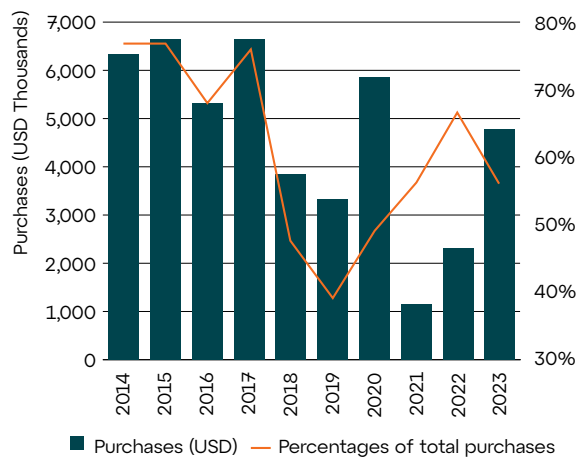


Figure 4: Capital expenditure

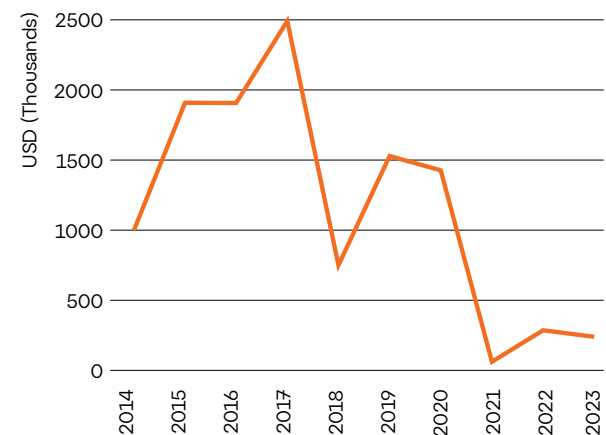
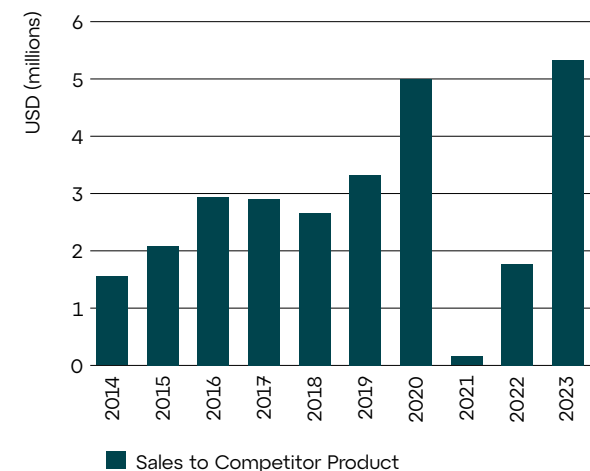


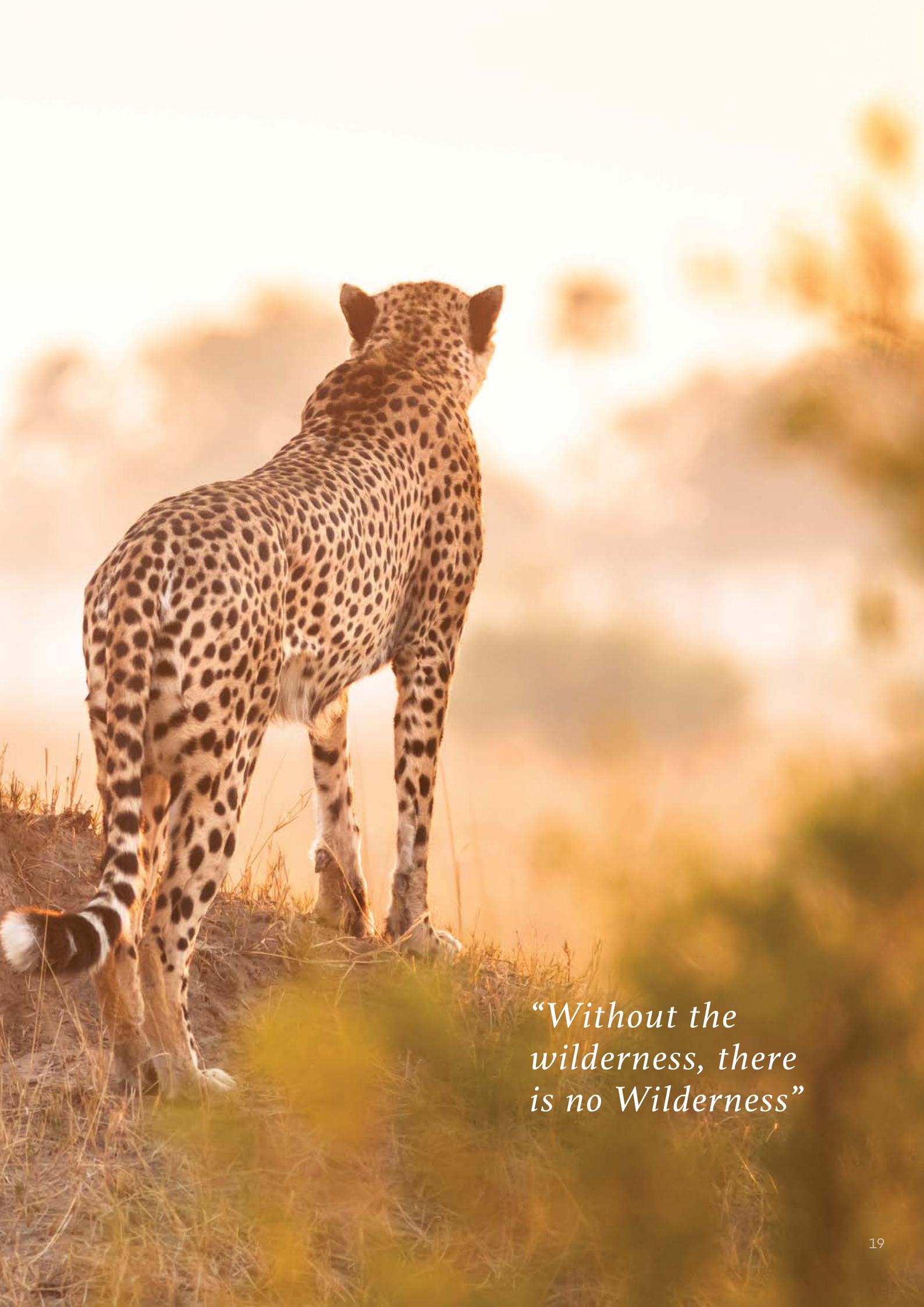
Figure 5: Wilderness sales to competitor product in Zimbabwe





WILDERNESS ZIMBABWE





*“Without the
wilderness, there
is no Wilderness”*

IMPACTS ON CONSERVATION AND COMMUNITIES

Our business operates in remote, rural areas, on land set aside for conservation by Government and/or communities. These areas have few sustainable economic alternatives, and the communities also suffer from limited access to education, health care and basic utilities. These factors lead to heavy reliance on the environment and can be threats to biodiversity conservation. But these areas, and the people living in and around them, are the foundations of our business, and so our Impact Strategy is designed and implemented in an effort to provide promising opportunities and address key threats to biodiversity.





THREE PILLARS TO OUR IMPACT STRATEGY



EMPOWERMENT

Our business creates value for wilderness and wildlife. Employment and small business support and integration reduce reliance on natural resources;



EDUCATION

Improved education increases economic opportunity, family resilience and support for conservation;



PROTECTION

Human-wildlife co-existence and wildlife security programmes protect people from wildlife and wildlife from people.

IMPACTS OF COVID ON WILDERNESS ZIMBABWE

Although the 2020 Covid-19 pandemic is now behind us, it had such significant impacts on the business that it would be remiss not to briefly touch on the subject in this report. As has been shown above, the main impact was in the lack of visitors resulting from border closures and cancellation of international flights. These resulted in the sales of Wilderness Zimbabwe slumping in FYs 2021 and 2022 to 3% and 18% respectively of pre-Covid levels. No business can survive such dramatic reductions in incoming funds, and so it was necessary for management to embark on a survival strategy aimed at preserving cash.

The main elements of this strategy were:

- Deferring or cancelling all non-essential capital expenditure;
- Implementing significant cost-cutting measures across the business. In the first year of the pandemic we were able to cut costs by 74%. Sadly, these cost savings were in large part achieved by reducing staff salaries (our biggest single cost) and these pay cuts remained in force, at varying levels, for two full years. Needless to say, this was very hard on our people;
- Negotiating with bankers to restructure debt facilities;
- Securing funding support from shareholders;
- Development of protocols and processes to minimise health risks to guests and staff once it became possible to start hosting the few tourists who were willing and able to travel.

Wilderness Zimbabwe was fortunate to receive the support of staff, suppliers, shareholders and bankers during this difficult time. But reactions to the pandemic were not all defensive. The Group embarked upon aggressive efforts to re-engineer itself, particularly in regard to channels to the market, and these will stand the business in good stead into the future. The result is a more robust, diversified organisation, albeit one with reduced cash reserves and increased debt. FY2023 has been a much better year, although occupancy

rates are still more than 15% down on those enjoyed pre-Covid. Global supply chain constraints, the growing cost of fuel and other inflationary pressures are weighing on the recovery. These are of course much exacerbated by the difficulties of doing business in Zimbabwe due to unsustainable statutory liquidations on export receipts and the exchange rate regime. Forward bookings suggest that business is not likely to return to pre-Covid levels before FY2025.

The very serious impacts that the pandemic had on Wilderness Zimbabwe and the industry are dramatically illustrated by many of the charts and graphs presented in this report, which show serious disruptions in financial years 2020/21 and 2021/22.







EMPOWERMENT

The Wilderness Group employs 370 people in Zimbabwe. Of these, all but one are citizens. As a testament to the quality and depth of the country's human resources, we have seldom needed to employ expatriates. Research conducted in our business some years ago indicated that each employee supports an average of eight dependents.

One of the major economic advantages of our business is how employment-intensive it is. Over the last 10 years, Wilderness Zimbabwe has employed an average of 2.2 staff members per guest bed, although this has increased more recently to 2.5 staff per guest bed as part of our efforts to increase quality of service delivery. This very high employment ratio is needed to provide the standards of service expected by guests visiting high-end lodges such as ours. This is illustrated by figure 7, which shows a strong correlation between the price charged for stays in the camps (which determines the standard of service expected), and the number of staff employed per guest bed: the higher the price charged, the more staff are needed to meet the required service standard. This shows the importance of our high-value, low-volume tourism model, from an economic perspective (as well as the more obvious environmental perspective).

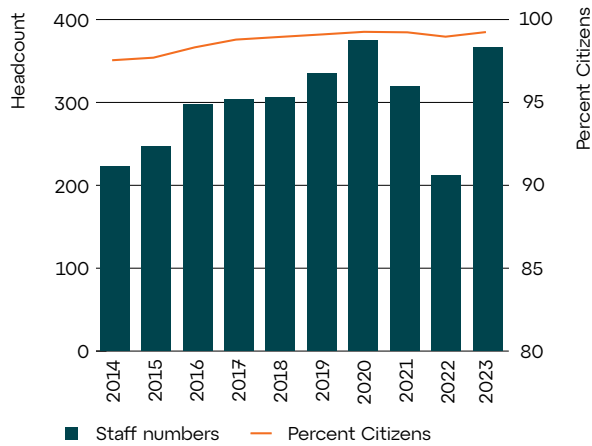
Employment of large numbers of staff means payment of significant salary bills. Over the last 10 years, Wilderness Zimbabwe has paid its staff nearly USD35 million, totalling just over \$4 million in FY2023. It is interesting to note, by reference to figure 2, that payments made to staff are equivalent to USD4 for every USD2 paid to Government and USD1 **contributed** by shareholders. Much of this cash has circulated in local economies, resulting in economic multiplier effects primarily in Matabeleland North and Mashonaland West. Of course, such salary bills have also resulted in significant payroll tax revenue to Government: USD5.5 million over the last 10 years and approaching USD1 million per annum in more recent "normal" years.

It is helpful to see these staff costs in the context of the overall costs incurred by Wilderness Zimbabwe. These are illustrated by figure 8, which shows that guest hosting costs (34%) are the single largest cost, followed closely by staff (32%). Aircraft sub-charters and fuel both amount to a further 9% each, meaning that these four line items constitute 84% of the costs of Wilderness Zimbabwe.

The training provided to these staff contributes to and empowers them and is a focus of our Educate impact pillar, discussed below.

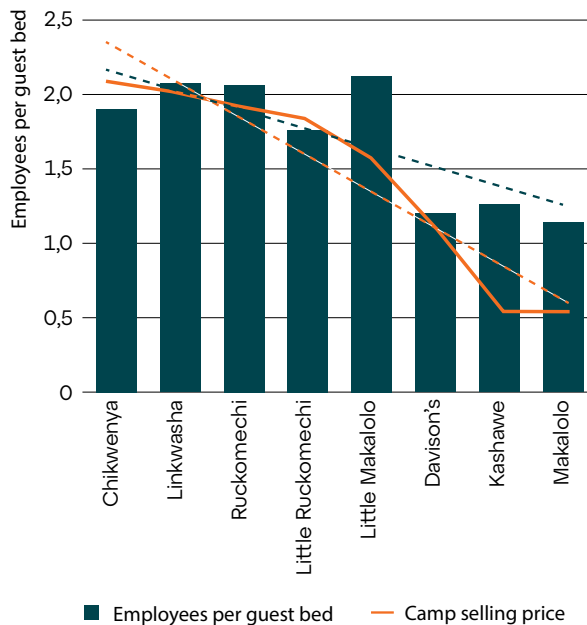


Figure 6: Headcount and localisation



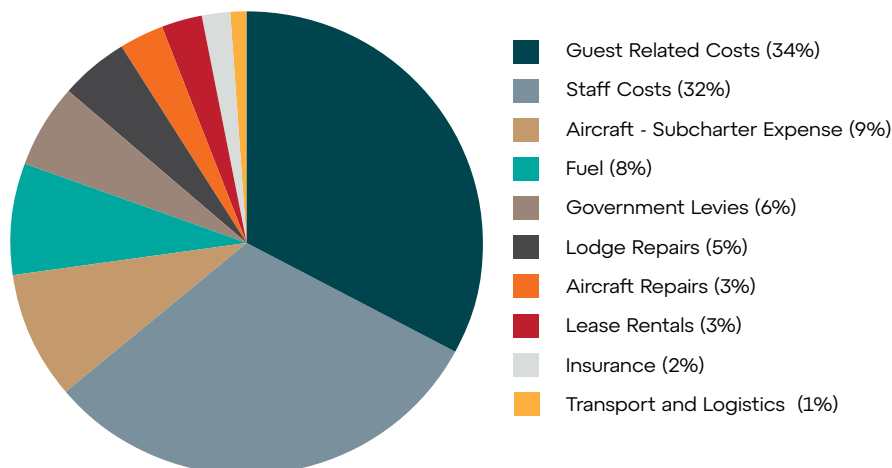
In addition to the business and employment relationships with our staff and communities, we and our guests and other partners also make various philanthropic contributions to the communities with which we work. The most important of these are in the field of education, which is the subject of its own Impact pillar, discussed in the next section. But many others are also made, depending on the needs of the communities and the funding available.

Figure 7: Relationship between camp selling price and number of staff employed



One of the most recent and notable of these significant contributions was in the form of food relief distributed to needy members of local communities most badly effected by the impacts of the pandemic on the economy. As tourism is one of the industries most badly impacted, our communities really struggled. Using funds donated by the Wilderness Group Chairman's personal foundation, as well as other valued supporters, we used our logistical base and staff resources to purchase and distribute more than 3 950 food parcels, totalling nearly 150 tonnes, and two tonnes of nutritional porridge, to eight schools in the Tsholotsho area. The cost of this food was USD185 000, but this cost does not include the in-kind contributions of staff time and transport, storage, etc. These distributions were made in accordance with the wishes of community leadership. It is estimated that this support reached nearly 19 750 people.

Figure 8: Major expenses of Wilderness Zimbabwe





*Distributed more
than 3 950 food
parcels, totalling
nearly 150 tonnes*



Other examples of community development initiatives and projects supported by Wilderness and our guests/donors over the last few years include:

- Drilling, equipping and maintaining four new solar-powered boreholes, as well as retro-fitting solar power to five existing boreholes, at Tsholotsho. A further solar array was fitted to an existing borehole at Hwange. The value of this support was more than USD133 000 and it is thought that more than 12 000 people have benefited;
- Construction of housing for waiting/expectant mothers at Ngamo clinic, plus the provision of medication, total value USD23 000;
- Construction of hostel and ablutions, to the value USD22 000, at Kapane Secondary School;
- Construction of various buildings to the value USD172 000 at seven different schools in Matabeleland North;
- Provision of solar power systems for Ngamo School and Tsholotsho and Hwange libraries;
- To vary livelihood options and reduce poverty, one of CITW's outreach programmes has assisted with the creation of 25 women's income generating groups. These allow women to utilise their creative skills by making unique products that can be sold. Innovative ideas using plastic waste have been incorporated into the traditional skills in basketry. This has resulted in marketable products, while instilling pride in the local culture and encouraging women to work together, cultivating a sense of teamwork and community cohesion;
- A glass recycling project was launched that has seen a significant reduction of waste material in the region, while simultaneously creating income for local community members. The glass recycling group comprises 15 men from the Ngamo and Ziga villages, who substitute river sand with finely crushed glass material to make breeze blocks, which are sold to the community and surrounding lodges;

- As poaching is one of the challenges faced in all Zimbabwe's wildlife areas, and copious amounts of snare wire are collected on anti-poaching patrols daily, the snare wire income generating project facilitated by Wilderness was established in 2019 in partnership with Ndau – a local artisan jewellery maker. The project focuses on using collected snare wire to make beautiful handcrafted jewellery, providing a meaningful way for it to be recycled and creating awareness around the poaching plight, while at the same time aiding anti-poaching efforts, enabling and empowering some of the local men and women in the communities surrounding Victoria Falls.

The value of the above projects exceeds USD732 000. Note that many of these concern provision of facilities at community schools and thus straddle both the Empower and Educate impact strategy pillars.



WILDERNESS ZIMBABWE





Ensure conservation through support to education, particularly on environmental matters, as well as leadership development, for rural children.

EDUCATION

There are two main arms to the Educate pillar:

- Children in the Wilderness, and;
- Training given to our own staff.

CHILDREN IN THE WILDERNESS

The Wilderness group is justly proud of the Children in the Wilderness (CITW) programme as implemented in Zimbabwe. The Zimbabwe programme is the flagship of CITW, which is now running in five countries. CITW is Wilderness' environmental and life skills education programme. It aims to ensure conservation through support to education, particularly on environmental matters, as well as leadership development, for rural children. The programme focuses on children in school or recent school-leavers. It thus addresses the next generation of decision-makers, inspiring them to care for their natural heritage and to become the custodians of these areas in the future. For more information on the CITW programme elements presented below, please see www.childreninthewilderness.com.

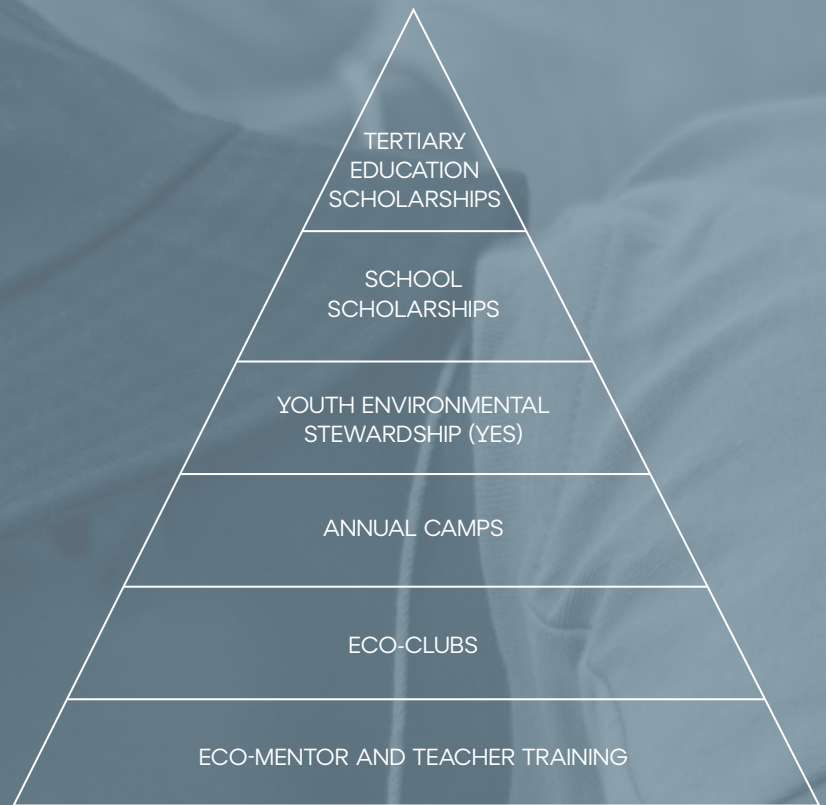
Children in the Wilderness (CITW) is implemented through an independent non-profit organisation founded and now supported by Wilderness. This support is provided through in-kind as well as monetary support:

- All subscriptions to the Wilderness Members' Club are donated to CITW;
- CITW staff salaries are funded by Wilderness, which also provides office space for CITW staff, logistical and administrative support, etc;
- Wilderness closes its camps to paying guests and hosts the children attending annual Eco-Club camps;
- Additional funds for CITW are raised through a variety of mechanisms, including guest donations and support through various other grants, including from the Wilderness Trust and other partners.





CITW PROGRAMME STRUCTURE



Initially, the programme was based on the annual Eco-Club camps conducted in our camps, closed to paying guests for the occasion. But this focus was subsequently changed to the Eco-Clubs, which enable us to reach a much larger number of children, as illustrated by figure 9. The programme has been running for 20 years and has reached large numbers of children, a total of 2 600 participating in Eco-Clubs and a further 474 attending annual camps.

Figure 9: Eco-clubs

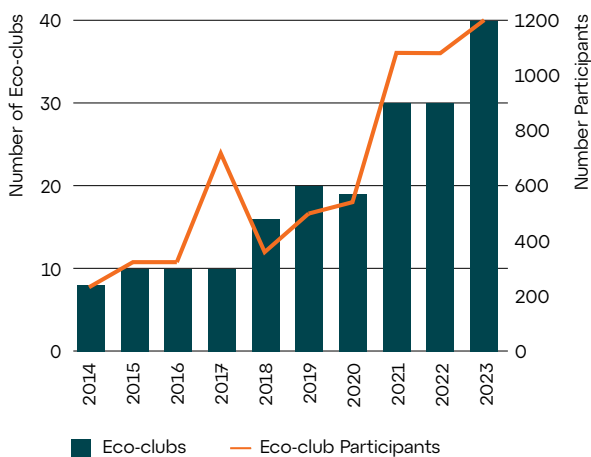
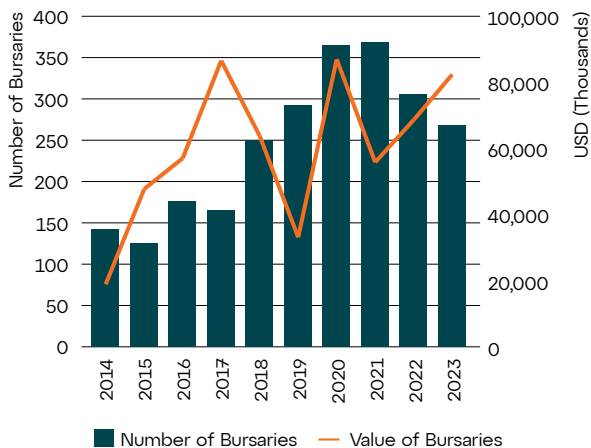


Figure 10: Bursaries



In order to ensure the CITW programme proceeds smoothly and with maximum impact, it is supplemented by training of teachers and mentors. Nearly USD300 000 has been invested in this training over the last five years.

Scholarships/bursaries are another major feature of the Educate pillar in Zimbabwe. Figure 10 shows

the remarkable statistics relating to this programme element. Over the last 10 years, up to 370 bursaries have been awarded per annum to deserving and needy students from local communities. These now total nearly 2 500 such bursaries, to a total value of more than USD600 000, over the period. We are incredibly proud of this contribution to our communities.

STAFF TRAINING

Wilderness Zimbabwe has the highest retention rate for staff, with many having spent over 15 years in our employ.

There are three main categories that are focused on:

- Interview process and sourcing the best candidates;
- In-house training (job specific);
- Upskilling.

Wilderness Zimbabwe prides itself in offering internal candidates the opportunity to take on new roles, and they are favoured if their skillset matches the need for the job. Training offered thus includes job-specific in-house training as well as upskilling.

Front of House training is done on site and is currently overseen by two Service and Standards Managers based in Hwange and Mana respectively. They equip Camp Managers with the ability to monitor and train their teams and move between camps as extra assistance and conduct routine checks and trainings throughout the year.

Wilderness Zimbabwe relies on the Group Food Experience Manager with regard to food menus, and then the Group Chef Trainer does their rounds to skill and upskill our chefs on new items. Support Teams comprise expert artisans such as plumbers, carpenters, electricians, mechanics, etc. These skills are trained by a National Certifying Agent and Wilderness encourages and assists our Support Teams to further their qualifications and levels where possible.

Being one of the most integral aspects of our business, Wilderness Zimbabwe conducts an annual Guide Training at the beginning of the season. This is overseen by Dave Carsons, who sits on the Zimbabwe Field Guides Association and is also an Invigilator for Zimbabwe Professional Guide testing and proficiency. The annual training also pulls in other departments, such as the Service & Standards Managers, to give a holistic approach to training. Throughout the year more individual checks and upskilling are done with Guide Training, and Dave Carsons travels through the camps to assist and measure competency, suggest training or further skill upliftment with the guides in their respective theatres of operation.

OPPORTUNITIES WITHIN

Wilderness Zimbabwe is proud to offer staff the opportunity to grow within the business. Some staff arrive without certain skill sets, but after following the respective training segments, grow from entry level positions to upper management.

Recent success stories have been Waiters following through to become Assistant Managers, Security Personnel entering the Trainee Management segment and so forth.





The quality of our tourism products, and the sustainability and prosperity of our business, are dependent upon the quality of the habitats and wildlife resources upon which they depend



PROTECTION

The Protect pillar of our Impact strategy is predicated on the reality that the quality of our tourism products, and the sustainability and prosperity of our business, are dependent upon the quality of the habitats and wildlife resources upon which they depend. Anything that we do that undermines the quality of these resources, undermines our business. Conversely, anything that we do that enhances these resources, improves our business: so we have a clear incentive to protect these resources. We do this through three main mechanisms:

- Paying a fair rental for the use of our concessions and the wildlife resources thereon;
- Group Environmental Management Systems (GEMS);
- Conservation and research interventions intended to improve the quality of the ecosystems.



CONCESSION AND OTHER PAYMENTS

The single most important contribution that Wilderness makes to conservation arises from the payments that we and our guests make to our Government landlords for the use of concessions that we occupy in the national parks, and the wildlife living in those concessions. These payments typically take the form of a lease fee based on a percentage of turnover, subject to an annual minimum plus park entry fees. This dual mechanism guarantees the landlord a minimum payment, regardless of what happens to the business, but also gives the lessor a meaningful stake in the success or failure of the business. These payments are important because they offset the costs incurred by Government in running these parks and create incentives to expand areas kept under wildlife. The scale and the quantum of these payments is illustrated by figure 11.

These payments have totalled USD7 million over the last 10 years and now amount to nearly USD1 million per annum. Even at the height of Covid, we continued to live up to our lease commitments, and payments in those two years totalled USD0.5 million.

GROUP ENVIRONMENTAL MANAGEMENT SYSTEMS (GEMS)

The purpose of our GEMS is to minimise any negative impacts on the environment that might arise from our operations, since these would

undermine the quality of our products and ultimately harm the business. We established Group Environmental Minimum Standards (GEMS) for our camps in order to attain and maintain the high standards that differentiate us from our competitors. The GEMS provide a structured framework by which our camps are developed, operated and, if required, ultimately decommissioned.

Camp management and operations staff, as well as contractors employed during new builds and refurbishments, are required to use the GEMS as an operating guide and the minimum standard. The GEMS are updated regularly to ensure that we are utilising the latest suitable and sustainable technologies, and adhering to best practice. In order to maintain the environmental integrity of our camps, we evaluate their performance against the GEMS bi-annually. These assessments allow us to measure our camps according to the same standards and help direct our efforts in instances where camps are not performing as they should. When first established in 2012, a five-year goal of 80% compliance was set. This was achieved in the specified time and we then created a new mid-term goal of 85% GEMS compliance in all camps. Our performance against these targets over the last 10 years is shown by figure 12. The gap shown for 2021 is the result of the pandemic, which resulted in most camps being closed. It also meant that Impact staff were not able to visit the camps to perform the assessments.

Figure 11: Concession and park fees

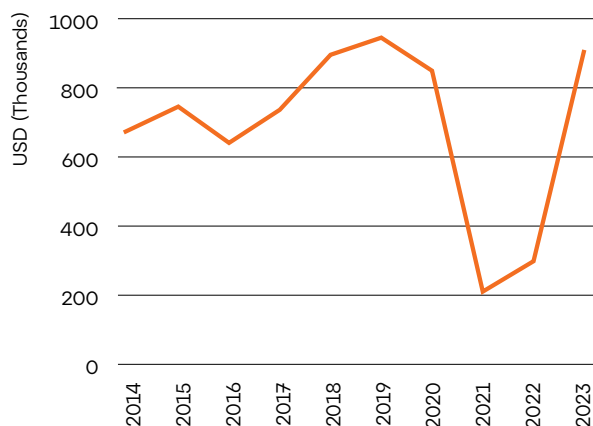
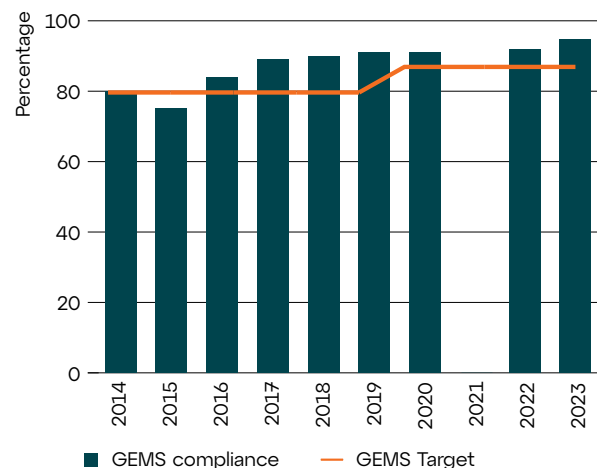


Figure 12: Compliance with GEM standards





We are pleased with the results of these assessments and will continue to ensure that these are done comprehensively and to the highest standards.

Two aspects of our GEMS warrant specific focus:

- Energy use and carbon emissions;
- Use of bottled water.

These are addressed in the following sections.

ENERGY USE AND CARBON EMISSIONS

Wilderness Zimbabwe has been focusing on improving energy efficiency, and reducing carbon emissions, for more than a decade. This is reflected in investment in solar power systems, such that five camps (63% of the total) now operate with hybrid solar and diesel generator power systems, with the remaining three being connected to the national grid (see figures 13 and 14). It should be noted, however, that supplies from the national grid have become increasingly erratic, with the result that backup diesel generators are having to run for longer periods than was intended.

Following these solar power investments and the resultant reductions in emissions from camp generators, the major emitters in Wilderness Zimbabwe are electricity drawn from the national grid (48%), which is mainly coal-powered in Matabeleland North, and aircraft (38%) (see figures 15 and 16).

There have not yet been advances in the development of battery powered aircraft to provide commercially practical solutions and there is little we can do about their emissions until that occurs, other than minimising the number of flights and distances flown. Given the cost of flying, we have a strong commercial incentive to do so. However, there have in recent years been significant advances in battery powered vehicles and it is a matter of a few years before battery powered game drive vehicles will be a reality. At the present time, such vehicles are too expensive and insufficiently practical for widespread use, but we are watching this space closely.





Figure 13: Camp power systems

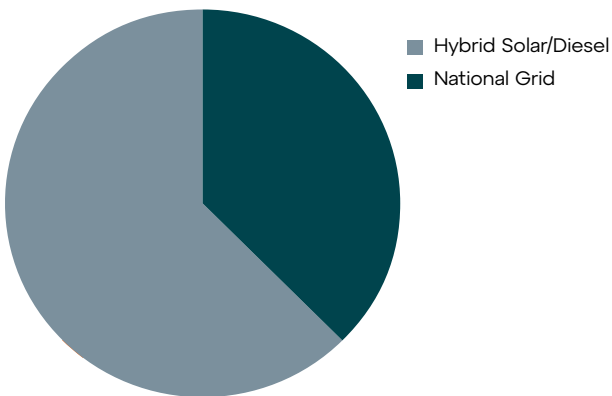


Figure 14: Installed solar power generation

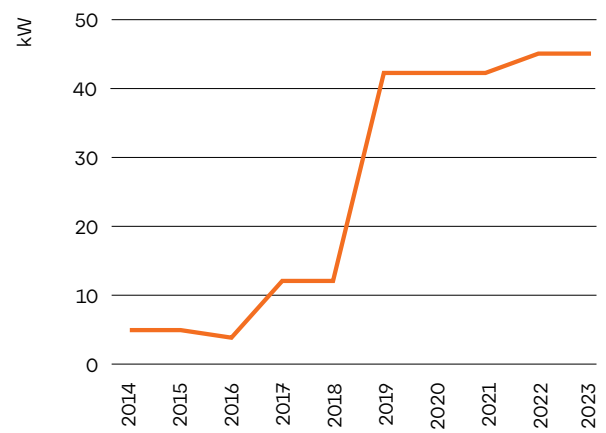


Figure 15: CO₂ emissions by source (2020)

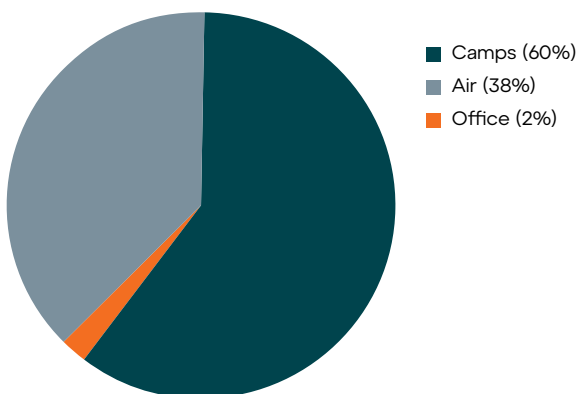
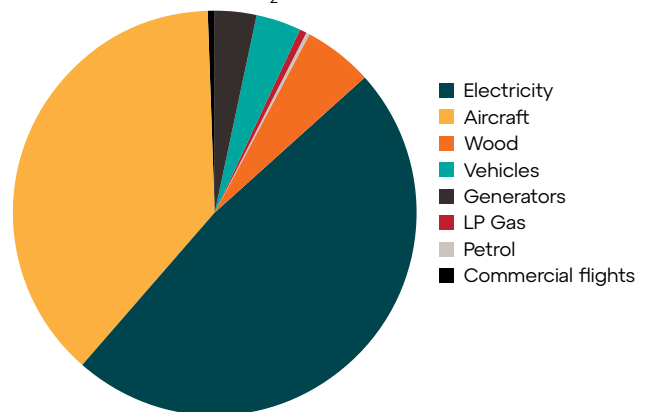


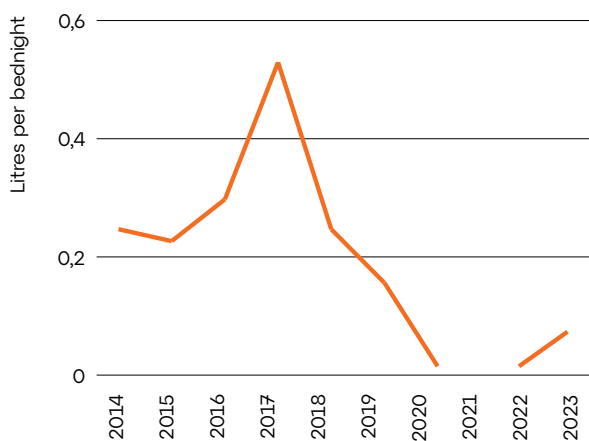
Figure 16: Causes of CO₂ emissions (2020)



USE OF BOTTLED WATER

This is another area in which we have made great progress in recent years. Historically, guests expected to be given bottled water and this resulted in large amounts being trucked into camps with resultant significant costs, carbon emissions in the production and transport of the bottles and plastic waste. In response, reverse osmosis filters were installed in all camps and guests actively discouraged from using bottled water. This is reflected in the significant reductions in use of bottled water shown in figure 17.

Figure 17: Bottled water consumption



BIODIVERSITY INTERVENTIONS

In addition to the payments made for use of concessions and wildlife, we and our guests also make contributions to various conservation initiatives. These sadly were forced to contract significantly as a result of the pandemic and the flow of funds from the business and guests will only commence once the operations and profits return to normal.

Nonetheless, Wilderness in Zimbabwe has two long-standing commitments to biodiversity conservation, of which it is justly proud:

- For nearly 30 years, we have supported the drilling, equipping and ongoing maintenance of boreholes for supply of water for wildlife in Hwange National Park. At the present time we are supporting through maintenance and fuel supplies the pumping of water at 14 waterholes. The continual streams of animals coming to drink at these pans is a testament to the massive impact they have had on wildlife in the Park. It is difficult to estimate the total value of this support, much of which has been in-kind, over the years, but this has been substantial. Over the last five years, we estimate this value at approximately USD75 000;
- For approximately 25 years, we have supported anti-poaching operations in Hwange National Park. This support has taken the form of funding for salaries and expenses of game scouts, vehicles, and logistical support. In 2012, this support was stepped up through our support for the formation of the Scorpion Anti-Poaching Unit, with assistance from Panthera. Since the inception of the Unit, it has conducted nearly 3 000 patrols, over more than 46 000 km, and removed nearly 2 800 snares. This support continues to this day and it is impossible to estimate what this support has cost. Over the last five years alone, we estimate this has cost us USD60 000.



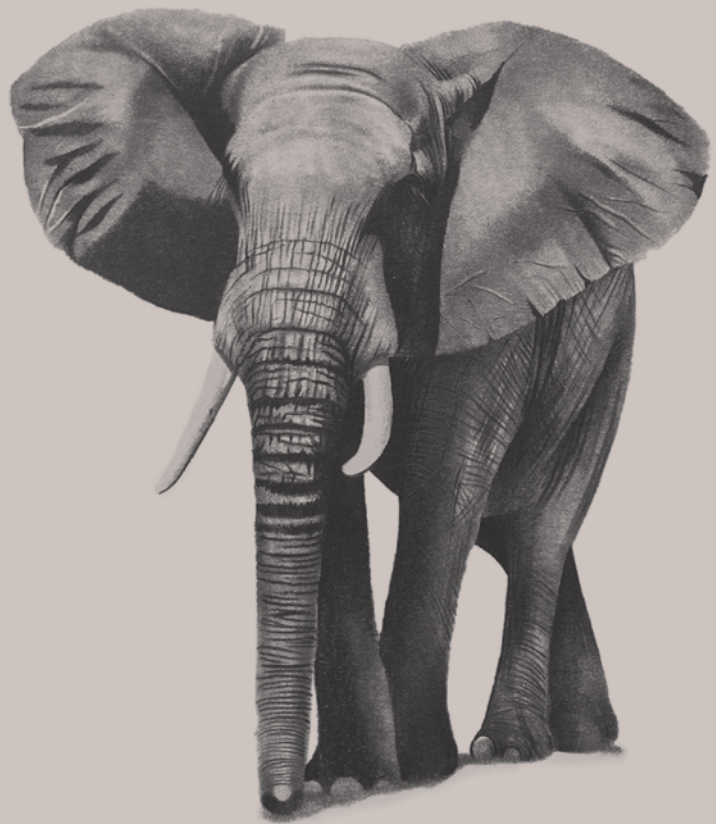
A close-up photograph of a man wearing a white long-sleeved shirt and a light-colored cap, kneeling in a field. He is carefully planting a small green sapling into a hole in the dark soil. The background is a soft-focus landscape with warm, golden light, suggesting a sunset or sunrise. The overall mood is one of care and environmental stewardship.

*We and our
guests also make
contributions
to various
conservation
initiatives*

GOVERNANCE AND COMPLIANCE

The financial statements of all companies across the Wilderness Group are audited annually by independent auditors, currently mainly PwC, but formerly mainly Deloitte & Touche. All companies have received clean audit opinions.

All tax affairs are conducted scrupulously in accordance with the legislation and all taxes are paid up to date. All relevant returns have been submitted.





WILDERNESS ZIMBABWE AND THE SUSTAINABLE DEVELOPMENT GOALS



End poverty in all its forms everywhere

Wilderness employs approximately 370 people. Many of these are employed in remote rural areas where there are few other economic activities and employment alternatives. Our research also shows that each employee supports an average of nearly eight family members, which means that our activities are directly impacting the lives of nearly 3 000 people. Salaries paid to these staff improve their lives and also circulate in local economies, creating multiplier effects. We are also committed to incorporating rural and community businesses into our supply chain and thus ensuring that a larger proportion of our value chain is created locally. Much more can be achieved in this regard.



End hunger, achieve food security and improved nutrition and promote sustainable agriculture

The poverty reduction measures outlined under SDG 1 make a material contribution to improving community livelihoods and eliminating any malnutrition in the regions in which we operate. All staff working in camps are supplied with nutritionally balanced meals for the duration of their stay/s in camps. A number of nutrition programmes and vegetable garden projects have been implemented and supported, either through Children in the Wilderness or the community outreach programmes. Nearly 152 tonnes of food aid was distributed to needy communities during the pandemic, benefiting more than 19 000 people.



Ensure healthy lives and promote well-being for all at all ages

Paramedics have been stationed in our major concessions to manage preventative health and wellness care, and manage health incidents. Preventative health care and well-being programmes for our staff are operated. In particular, we continue with efforts to educate staff about the dangers of HIV/AIDS and avoiding infection. For those staff that are infected, we support their efforts to obtain anti-retrovirals and to manage their health. We also work to identify any injury and or health risks existing in the workplace, eliminate or mitigate these as far as possible, and educate staff as to any residual risks. A number of initiatives of community development programmes, as well as Children in the Wilderness, work to improve awareness and health in the community areas in which we operate.



Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all

Comprehensive training programmes are in place for staff at all levels, and all facets, of the organisation. Children in the Wilderness, working through Eco-Clubs, CITW camps, Youth Environmental Stewardship and scholarship programmes all address education and learning opportunities for our neighbour communities.



Achieve gender equality and empower all women and girls

Discrimination of any kind, including gender discrimination, is forbidden in the Group. Adult Eco-Clubs, operated under the auspices of Children in the Wilderness, have worked to empower women through promoting gender equality and creating opportunities to diversify livelihoods.



Ensure availability and sustainable management of water and sanitation for all

All guests and staff are provided safe drinking water. All staff housing incorporates suitable ablutions for staff. Water-saving technologies are employed. A number of boreholes and toilet facilities have been provided under the aegis of Children in the Wilderness and/or community outreach/development activities.



Ensure access to affordable, reliable, sustainable and modern energy for all

Energy-saving technologies are employed in camps and offices. Most of our camps employ renewable energy of various kinds to provide power for operations.



Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all

The Wilderness business model is all about sustainable tourism and employment creation, in remote rural areas where few alternative economic activities are possible. By operating a successful business, we are able to empower local communities and help to conserve Zimbabwe's wilderness areas for future generations to enjoy. We actively work to improve the quality of the ecosystems and the wildlife populations based upon them, since this improves our business. Conversely, any activities that undermine ecosystems also undermine our business and so we actively work to prevent this. Our employment is labour-intensive and provides opportunities to unskilled workers coming from poor rural communities.



Build resilient infrastructure, promote inclusive and sustainable industrialisation and foster innovation

The building technologies employed in our camps are low-impact, using sustainable materials to the maximum extent possible, and can be completely removed without a trace after camp closure, should that occur. Our camp site rehabilitation processes have in the past been recognised by industry awards. Our camps are built and operated in accordance with Group Environmental Minimum Standards developed to ensure that any negative impacts on the environment are prevented and minimised. Camp performance against these standards is evaluated on a bi-annual basis and remedial action taken in the event of camps that do not meet the necessary standards.



Reduce inequality within and among countries

A large proportion of our staff come from poor rural communities and the income they derive from employment constitute material contributions to the rural economies. Our employment and outreach activities are non-discriminatory.



Ensure sustainable consumption and production patterns

The whole rationale for our business is to be sustainable, and this is ensured through our Impact Strategy. As noted under SDG 9, our Group Environmental Management Systems were developed and are implemented to ensure the ongoing sustainability of our operations. Bi-annual reviews assess ongoing compliance with these standards and remedial action is taken where required. No hazardous chemicals are used in our operations and all solid and liquid wastes are appropriately managed and disposed of. Waste is minimised and separated for recycling where opportunities exist. Use of bottled water is actively discouraged through the provision of alternatives and the setting of targets for reduction. We have also embarked upon a 'War on Plastic'. We have shared our Group Environmental Minimum Standards with our competitors and collaborate with them in our impact endeavours. Children in the Wilderness Eco-Clubs and camps, as well as Eco-Mentor training, include lessons on climate change, waste management, recycling and sustainable consumption and production.



Take urgent action to combat climate change and its impacts

Wilderness Zimbabwe has focused on reducing power consumption and invested in renewable energy.





Conserve and sustainably use the oceans, seas and marine resources for sustainable development

Not applicable: Wilderness Zimbabwe does not operate on or near marine resources.



Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss

We operate in a number of formal and informal protected or wilderness areas and actively work to ensure our operations do not impact negatively on them. At the same time, our presence and operations highlight these areas and their potential and importance, providing resources for their conservation and management and thus contributing to their maintenance and conservation.

We have worked to re-establish locally extinct populations into their former ranges where possible.

Support of anti-poaching operations by Government is provided when requested.

Our community outreach and Children in the Wilderness programmes aim to educate local communities, especially children, on the importance of their wilderness areas and to reduce unsustainable uses of them.



Strengthen the means of implementation and revitalise the Global Partnership for Sustainable Development

The Group has numerous partnerships of various kinds with governments, NGOs, community organisations, donors, academic institutions and other businesses: all with the aim of collaborating and leveraging respective strengths to ensure sustainable development.

HOW CAN YOU HELP?

If you would like to donate to assist with **Wilderness Zimbabwe's impact activities**, please follow the link below:
empowersafrica.org/partners/wilderness-wildlife-trust/

For donations specific to our **Children in the Wilderness** programme, please follow this link:
empowersafrica.org/partners/children-in-the-wilderness/

AWARDS



Wilderness Zimbabwe receives many awards and accolades recognising the quality and sustainability of our camps and our business. The awards won by the Zimbabwe business are too numerous to all be listed here. Instead, we note what we consider the most important awards won in recent years, with emphasis on those received over the last five years:

- Wilderness Zimbabwe, & CITW, wins Environmental Stewardship and Social Impact Award from the Corporate Social Responsibility Network Zimbabwe (October 2022);
- Wilderness Ruckomechi wins World Travel Award in the Zimbabwe's Leading Safari Lodge category (October 2022);
- Wilderness Safaris Zimbabwe wins Environmental Stewardship and Social Impact Award from the Environmental Management Agency and Corporate Social Responsibility Network Zimbabwe;
- Davison's Camp receives TripAdvisor Certificate of Excellence for 2019;
- Linkwasha receives TripAdvisor Certificate of Excellence for 2019;
- Chikwenya listed in Tatler Travel Guide's 101 Best Hotels in the World (November 2018);
- Wilderness Safaris' Zambezi Environmental Officer, Arnold Tshipa, shortlisted for a PURE Award (Unsung Hero category) (August 2018);
- Wilderness Safaris Zimbabwe longlisted in the African Responsible Tourism Awards for Best Responsible Cultural Experience for its Linkwasha Cultural Exchange – Ngamo and Ziga Village Visits – in partnership with Children in the Wilderness;
- Linkwasha Camp wins 2018 Hotel & Lodge Award in France;
- Little Makalolo receives Outstanding Service Award from Gohotels.com (January 2018);
- Linkwasha included in Air France Madame's Gold List as one of the top hotels worldwide (June 2017);
- Wilderness Safaris shortlisted for We Are Africa Innovation Award (Conserve Africa category – support of the Scorpion Anti-Poaching Unit in Hwange) (May 2017);
- Ruckomechi Camp listed in the US Food & Wine Hotel Awards (April 2017);
- Linkwasha Camp named one of the world's best new hotels in Condé Nast Traveller's 2016 Hot List;
- Linkwasha Camp listed as one of the world's best new hotels in Travel + Leisure's It List (February 2016);
- Linkwasha Camp listed in the 2016 Tatler Travel Guide as one of the "World's 101 Best Hotels";
- Linkwasha Camp listed as one of the best new hotels in the world in the Town & Country Travel 100 (September 2015);
- Linkwasha Camp selected as one of the Top 20 African Safari Lodges in the world by The Times UK and Ireland (July 2015);
- Little Makalolo listed in Condé Nast Traveler Readers' Choice Awards (October 2014);
- Ruckomechi wins AZTA (Association of Zimbabwe Travel Agents) Award for Best Safari Tented Camp (October 2013).







WILDERNESS

ZIMBABWE

Discover Earth's Ultimate, Untamed Places