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1. INTRODUCTION TO WRSA (WILDLIFE RANCHING SOUTH AFRICA)

WRSA is acknowledged by government and stakeholders as an organisation representing the national and international interests of the wildlife ranching industry. This relates to the sustainable breeding, conservation, production and marketing of wildlife in South Africa.

WRSA constitutes the largest collective of 1,500 commercial wildlife ranchers (landowners) or businesses and additional 450+ individuals (students or people with an interest in commercial wildlife ranching). Wildlife ranchers conduct their activities from millions of hectares of agricultural property dispersed throughout South Africa.

WRSA’s key strategic focus areas include amongst others, to stimulate growth and create demand, working together with all stakeholders and especially the South African government, to ensure future sustainability and success of the industry. As an industry representative for commercial businesses, WRSA, therefore, has a real and direct interest regarding the impact of COVID-19 on wildlife ranchers.

2. KEY MESSAGES: COVID-19 & THE SOUTH AFRICAN WILDLIFE RANCHING INDUSTRY:

• From the scientific results as published in this report, it is clear that the South African wildlife industry is on the brink of collapse due to the impacts of COVID-19 on the industry and unless mitigation measures are introduced urgently to allow for live game trade, the production and distribution of game meat and the introduction of incremental local hunting and tourism activities, most product owners in the wildlife industry in South Africa will not survive the impacts of COVID-19.

• Despite wildlife management being stipulated in the National Disaster Management Regulations as an essential activity, the lockdown resulted in severe negative effects for the South African private wildlife ranching industry, which included not only the international hunting and tourism market, but also the domestic hunting and tourism market, live game trade, game meat sales and other related activities.

• Section 4 of this report provides a summary of a survey conducted by WRSA, to determine the impact of COVID-19 on the South African private wildlife ranching industry, indicating amongst others a 86% decline in hunters/tourists visiting game farms/lodges during March and April 2020, 52% drop in live game sales during March and April and 67% permanent employees affected either being on reduced wages, unpaid leave or made redundant by the end of April. It also provides estimations for expected total losses until December 2020.

• The South African wildlife industry first felt the effect of COVID-19, when travel bans were instituted early in 2020 by some of the countries from where South Africa’s international hunting tourists originate from, basically bringing the international hunting industry to a halt.

• On 23 March 2020, President Ramaphosa announced South Africa’s initial nation-wide lockdown period of 21 days, with the purpose to contain the spread of COVID-19. In a meeting held with representatives of the South African wildlife industry on 27 March 2020, the Minister of Environmental Affairs, Mrs Barbara Creecy emphasised the purpose of the lockdown period, to prevent people from dying.
• The devastating impact of COVID-19 on the South African wildlife ranching industry became more evident when the lockdown period was extended by President Ramaphosa on 22 April 2020. In his address on 22 April 2020, President Cyril Ramaphosa made a statement on economic and social measures in response to the Covid-19 Epidemic. The President stated that the pandemic requires an economic response that is equal to the scale of the disruption it is causing, and that the economic response can be divided into three phases. The first phase began in mid-March when the pandemic was declared a national disaster. The second phase, during which this report is being released, will see an economic response developed to stabilise the extreme decline in supply and demand and project jobs. The third phase will focus on the implementation of measures to drive the recovery of our economy as the country emerges from the pandemic. A summary of the alert levels of the National Risk Adjusted Strategy, how the alert system works and how the phased easing of the lockdown will be undertaken was also provided.

3. INTRODUCTION TO THE SOUTH AFRICAN WILDLIFE INDUSTRY

Wildlife ranching has already played an important role in rural development, having transformed more than 20.5 million hectares of marginal agricultural land into thriving game ranches.
4. IMPACT ASSESSMENT OF COVID-19 ON THE SOUTH AFRICAN WILDLIFE RANCHING INDUSTRY:

Considering the devastating effects of COVID-19 on the South African Wildlife Ranching industry, WRSA conducted a survey (quantitative, non-probability, namely convenience sampling) amongst 1,500 commercial wildlife ranchers (WRSA members) as well as through other agricultural and wildlife platforms, such as Agri-SA. HAWASA (Hunting & Wildlife Associations of South Africa) and Wildswinkel. The was done by means of an online questionnaire whereby 601 respondents completed the questionnaires. Of the 601 respondents, 67% were WRSA members (this is 26% of the 1,500 commercial wildlife rancher members registered with WRSA) and 23% of the respondents were wildlife ranchers who obtained the survey through other means. The return rate and representation is extremely good in the context of surveys. In most instances, the results of this study will indicate the individual average losses, as well as extrapolations to the sample of 601 respondents, (taking into account where respondents indicated that a specific question was not applicable to them) and 1,500, being the number of WRSA member registered with the organisation as commercial wildlife ranchers. The estimates as included in the summary, should be interpreted with caution, in view of the magnitude, volatility and unprecedented nature of this crisis.

4.1 WILDLIFE RANCHING ACTIVITY SECTORS:

The four fundamental pillars of wildlife ranching were presented to the respondents of this survey, whereby the majority of the respondents indicated that hunting is the main activity (94%), followed by breeding (71%), tourism (61%) and game production (59%). The 8% “other” refers to cattle farming, taxidermy, etc.

*Please note that the percentages in Figure 1.1 do not add up to 100%, since respondents had the opportunity to indicate more than one wildlife ranching activity by means of a multiple answer question.
4.2 DECLINE IN HUNTERS AND/OR TOURISTS VISITING GAME FARMS/LODGES DURING 2020, DUE TO COVID-19:

To WRSA’s knowledge, this was the first survey which included questions regarding the value of eco-tourists visiting game farms/lodges. Previous surveys and available statistic figures only reflect the economic value of hunting as a consumptive tourism activity, eg. R11.6 billion for both local South African hunters (2018: North West University) and R2.1 billion for international hunters (2018: Department of Environmental Affairs).

This survey requested respondents to indicate the full value of losses due to cancellations and a decline of tourists, which include hunters (consumptive tourism) and/or eco-tourists. From the responses, it is clear that the value of eco-tourists visiting game farms/lodges, could equal or even be higher than that of hunters.

Ninety-five percent (95%) of the respondents experienced a decline in the number of hunters and/or eco-tourists visiting their game farms/lodges during March and April 2020 (Figure 2). The following graphs postulate information regarding:

a) The total percentage decline during March and April 2020 (86%);  
b) The percentage cancellations of confirmed bookings for the period March to December 2020 (74%); and  
c) Compared to April 2019, the percentage decline in new bookings received during April 2020, for the rest of the year until December 2020 (76%).

![Decline in tourists and/or hunters visiting game farms/lodges](image)

Figure 2: Decline in hunters and or tourists visiting game farms/lodges
4.2.1 ESTIMATED FINANCIAL LOSSES DUE TO CANCELLATIONS OF HUNTERS AND/OR ECO-TOURISTS VISITING GAME FARMS/LODGES IN 2020, DUE TO COVID-19

It is important to consider the average financial losses of game farms/lodges since the outbreak of COVID-19 in South Africa, due to cancellations of confirmed reservations, received.

The results revealed that the average loss per respondent for the period March to December 2020, is R2.5 Million. If this is extrapolated to the number of commercial wildlife ranchers registered with WRSA (1,500), it results in a loss of R3.8 billion. The total loss for sample size (601 respondents) results in R1.5 billion (Figure 3).

![Estimated financial loss: Cancellations of tourists and/or hunters for March to December 2020](image)

**Figure 3: Estimated financial losses: cancellations of hunters /eco- tourists: March to December 2020**

4.2.2 ESTIMATED FINANCIAL LOSS DUE TO A DECLINE IN NEW BOOKINGS RECEIVED FOR THE PERIOD APRIL TO DECEMBER 2020

It was further important to determine the financial losses due to a decline in new bookings received for the remainder of the year (April to December 2020). This was compared to the number of new bookings received during the same time in 2019. The average loss per respondent is R2.1m, if extrapolated to the number of commercial wildlife ranchers registered with WRSA (1,500), it amounts to R3.1 billion. For the sample size (601) the total loss is estimated at R1.2b.
4.3 LIVE GAME SALES

4.3.1 Average financial losses: March & April 2020 and Estimated losses March to December 2020

With live game trade being one of the fundamental pillars of the South African wildlife ranching industry, it was important to determine the impact of COVID-19 on this sector. Respondents to this question indicated a 52% loss in live game sales, translating to the amount of R453 218. Should the percentage be an indication of the financial losses for 2020 and considering the 2019 economic contribution of live game sales of approximately R3.5b, the estimated loss for the year could be in the region of R1.68b (figure 5).

Figure 5: Estimated losses: live game sales : 2020 compared to 2019
4.4 GAME MEAT SALES

Average financial losses March and April 2020 and Estimated losses March to December 2020

Respondents indicated that for March to April 2020, they experienced an average financial loss in game meat sales of R150 771 per respondent. If this is extrapolated to 1,500 WRSA commercial game ranchers, it amounts to R226 156 537 and extrapolated to the sample size of 610, amounts to R90 613 386. When extended to December 2020, it escalating to an estimated R638 million for the 1,500 commercial game ranchers and R255 million to the sample size of 601.

![Financial Loss: Game Meat Sales](image)

Figure 6: Financial loss: game meat sales

4.5 COVID-19 IMPACT ON EMPLOYMENT

Respondents indicated an average staff complement as at the end of February 2020, of 15 staff members per game farm. These figures do not include the additional part-time employees during hunting season, who basically all will have no income if no hunting takes place during the year.

The results showed that by the end of April 2020, permanent employees on reduced wages due to COVID-19 were estimated at 31%. Employees with unpaid leave at the end of April 2020 was 19% and employees that have been made redundant during March and April 2020 stand on 17%. It is further estimated that 56% of the remaining permanent employees face reduced wages, unpaid leave or to be made redundant by December 2020 should the situation continue.
4.6 LEVEL OF INCREASE IN ENVIRONMENTAL CRIME

As hunting and eco-tourism came to a standstill, it is important to determine wildlife ranchers’ expectations on the possibility of an increase in environmental crime such as poaching, theft, etc. 421 of the 601 respondents indicated a potential high increase in environmental crime during the period of lockdown.
5. RECOMMENDATIONS:

From the above scientific results, it is clear that the South African wildlife industry is on the brink of collapse and unless mitigation measures are introduced urgently to allow for live game trade, the production and distribution of game meat and the introduction of incremental local hunting and tourism activities, most product owners in the wildlife industry in South Africa will not survive the impacts of COVID-19.

5.1 Immediate actions to be taken:

The South African wildlife economy plays a vital role in unlocking economic growth and employment in rural areas through, amongst others, consumptive tourism (hunting), live game trade, eco-tourism, food and job security. It is therefore, crucial to prevent the wildlife economy to collapse. WRSA therefore, recommend the following immediate actions:

5.1.1 Live Game Trade: To allow the live game trade economy to start recovering, the trade of wildlife must follow the regulations of other agricultural commodities already in COVID-19 Level 4. Provincial and national government departments systems should cooperate, by delivering essential services such as the issuing of permits and other necessary documentation, allowing wildlife ranchers to operate. Activities will include activities relevant to veterinary procedures, sales, auctions, inspections and movement across provincial borders.

5.1.2 Harvesting of wildlife through hunting: With the lack of international hunters because of restrictions in movement, it would be important to allow in Level 4 already, for the harvesting of wildlife through local hunting on a basis where hunters will be allowed to stay over at hunting lodges, within the necessary health and safety directives. This will be within the normal hunting seasons as allowed in terms of provincial regulations. When it comes to the harvesting of wildlife for game meat, hunting secures the highest value to game. Without hunting, wildlife will lose its value.

A self-funding model for wildlife ranchers must be allowed as much as possible, through opening hunting and wildlife trade. Hunting parties on game farms could be limited to a small number at any given time, on a self-catering basis. The health risk can be minimised to a very low impact. Guests could be COVID-19 tested by a medical practitioner or approved facility at own cost before allowing them a permit to visit the game ranch.

5.1.3 Game Meat: Wildlife ranchers and communities can immediately fulfil an extremely important role in providing game meat as a healthy protein. In the absence of a normal hunting season, wildlife ranchers will be faced with a challenge of overgrazing and over population of wildlife on their properties. What makes the situation even worse, is the fact that most farmers are only now coming out of one of the
worst droughts that South Africa had experienced; therefore this is a double blow for the industry. The carrying capacity of game farms are therefore under pressure and if not able to take off wildlife from the veld, it will further worsen the situation. Animals need to be harvested. Game meat can also be channelled to the needy, through a government social grant system, ensuring a win-win situation by making it economically sustainable for wildlife ranchers as well.

5.1.4 WRSA recommends the urgent forming of a *Wildlife Ranching Economy Recovery Task Team* made up by the private sector, financial institutions and government to investigate and develop models to assist wildlife ranchers. National and provincial government departments should use the opportunity to create positivity, with the necessary directives and protocols, by introducing specific recovery models to normalise the wildlife economy during or after COVID-19, as soon as possible.

5.2 Incremental actions to be taken:

5.2.1 The correct support and funding models could result in the recovery of the South African wildlife ranching industry. These could, amongst others include:

- Government disaster funding to be made available to assist wildlife ranchers;
- Government assistance to hunting outfitters. The decline in hunts during 2020, will result in major losses for **game ranchers and** hunting outfitters who will have to spend huge amounts to market their **hunts and destinations** at international shows mainly during January to March 2021. Financial assistance would be needed to allow them to proceed promoting South Africa as a preferred hunting destination at the international hunting conventions and ensuring international tourists visiting South Africa soon again.
- Financial institutions to institute lower interest rates for wildlife ranchers and introduce payment holidays where possible until the start of the new hunting season: March 2021.
- Financial institutions to make financial loans available to wildlife ranchers, to be paid off over longer terms than 2-5 years.

5.2.2 **Hunting:** As explained in clause 5.1.4 above.

5.2.3 **Eco-tourism:** During the period October to February when hunting activities are limited, eco-tourism plays an integral part in uplifting the economies in rural areas and special attention should be given to attract domestic and, if the restrictions on traveling would be uplifted, international tourists to those areas as from COVID-19 Level 3.
It is of the utmost importance to prevent the wildlife economy to collapse due to COVID-19

The South African wildlife industry can meet the needs of our country; wildlife can be turned into an asset for everyone.

Its unique competitive advantage, provides the South African wildlife industry with opportunities to raise its level of social and economic contributions, to the benefit of all South Africans.

Because of South Africa’s unique model, our country has the ability to repopulate African countries with wildlife in future – 21st Century Conservation in the true sense of the word, to the benefit of our continent, Africa

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