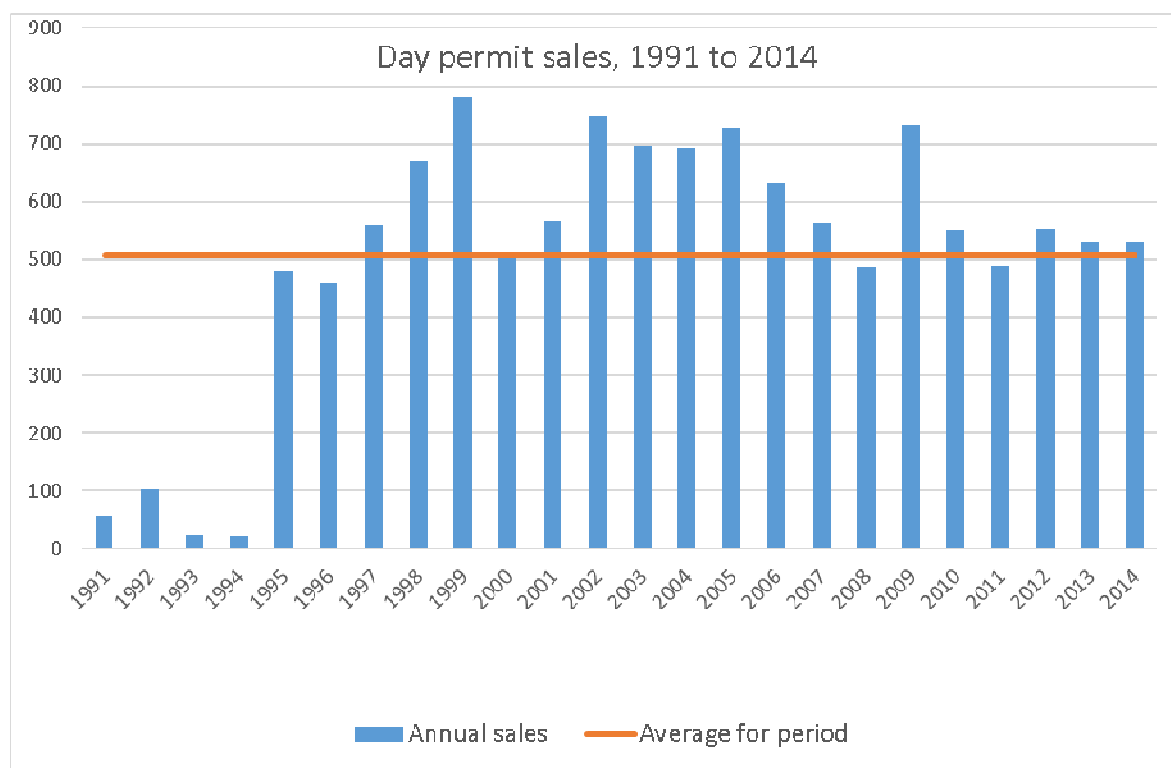


THE ECONOMIC CONTRIBUTION OF THE WILD TROUT ASSOCIATION TO THE E. CAPE HIGHLANDS –
Dave Walker, August 2015

The purpose of this document is to provide a brief insight into the economic impact of the activities of the Wild Trout Association over the past two and a half decades. It is by no means a definitive dissertation of any academic merit but is an informed indication based on data recorded since 1991 in the case of day permit sales and since 2001 of the annual festival catch returns collected from participants.

Graph 1



When viewing day permit sales shown in Graph 1, the first question that arises is surely “why the dips”. A simplistic answer is that day permit sales figures are not only a reflection on the weather but also on the social fabric of South Africa.

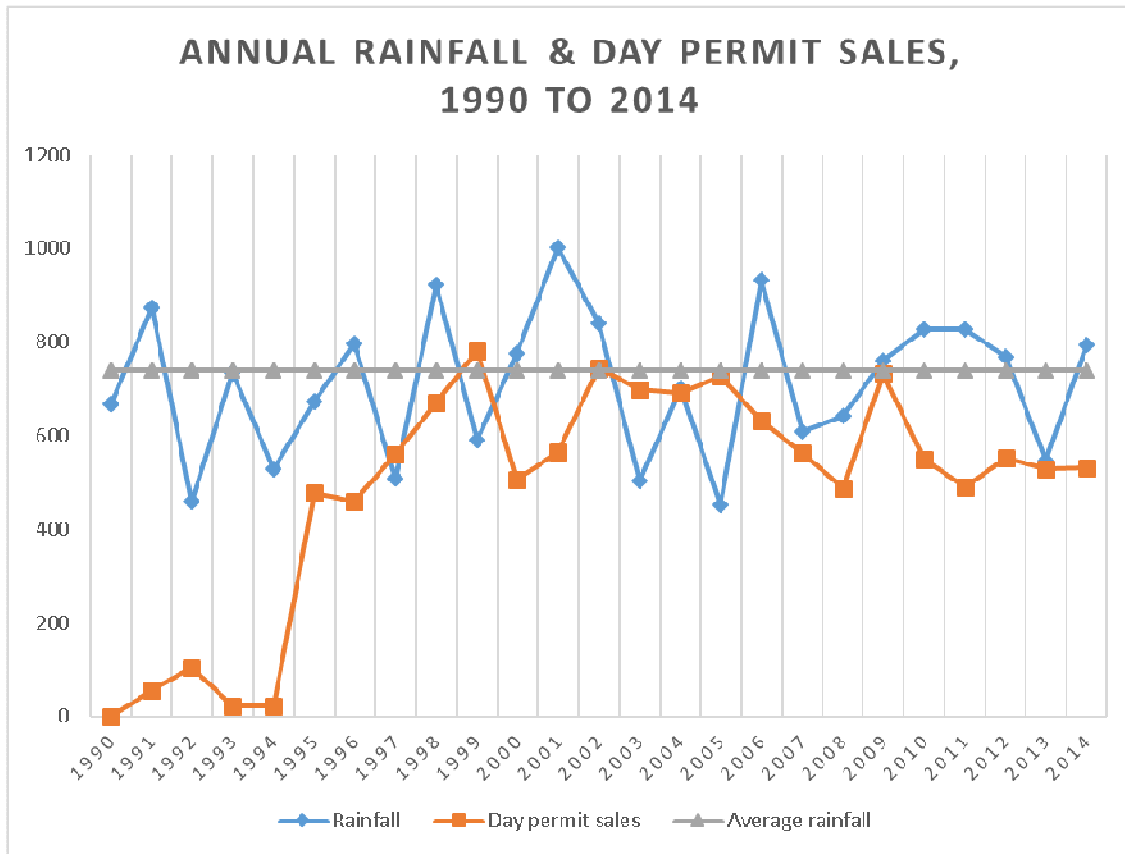
The first two years of association activity indicate a growth trend but which was interrupted by violent rural incidents in the Eastern Cape. Farm attacks became a feature of the run-up to the first elections in 1994. In addition to farm attacks, the attack on the Kingwilliamstown Golf Club, the bomb in the Queenstown Spur and similar events within the Eastern Cape took their toll on day permit sales. This, despite the fact that there weren’t any attacks in the Barkly East district at the time, was as a result of newspaper articles that included “Eastern Cape” in the headlines. Even fly fishing enthusiasts were loath to visit the highlands of the Eastern Cape and the 1993/4 sales plummeted.

1995 saw a distinct recovery that peaked in 1999. I have no doubt that, if one researched the amount of media exposure referred to later as well as our participation in many trade shows, one would find that there would be a correlation between this media exposure and day permit sales. The steady decline in sales between 2005 and 2009 could be weather related from both an above and below average point of view. The low in 2011 was most certainly attributable to high rainfall, particularly the week before the festival. In more recent years, sales have been fairly consistent despite below average rainfall in 2013. Making use of total annual rainfall figures has its pitfalls as, for example, the total may be in line with other years but it may have fallen at different times during the year. Most visitors are long week-end or holiday-bound and that are peak visiting times but which are affected by either high or low rainfall prior to these times that has a negative impact on water levels and consequently, day permit sales.

The rainfall figures shown in Graph 2 were obtained from SA Weather Services who kindly obliged by providing them at no charge. The data was collected from 4 weather stations located in the Barkly East district, namely Barkly East, Caerleon, Funnystone and Rhodes. Unfortunately, the Rhodes station ceased operating in 2006 however, at the risk of generalising, the overall picture created is sufficient for the purposes of this analysis.

A completely different consideration regarding the general decline in day permit sales is the fact that as the WTA has strived to make more fishing available to the man in the street so has the popularity of the area increased. A result of this is that visiting fly fishers get to know riparian owners and who, as is their indubitable right, invite such folk to stay and fish on their properties thus relieving the visitor of the necessity of buying day permits.

Graph 2.



The current government’s downward spiral compounded by the USA’s economic plunge that had a negative impact on South Africa saw the halcyon days of the past decades’ disposable income boom fade into history and ticket sales started to decline from 2006 and plunged by 2008. To confound the critics, the upward surge of 2009 could be ascribed to marketing. The subsequent years except for 2011 have remained fairly constant and the 2011 dip can yet again be ascribed to weather as shown in the festival statistics where the total catch plunged to 172 in 2011. Massive rain that summer rendered the water unfishable for much of the summer.

The annual fly fishing festival, in the words of Tom Sutcliffe, is the premier fly fishing festival in South Africa and a significant source of revenue for the association as well as for riparian owners by way of day permit fees. In more recent years, the field has been limited to 40 participants although 2015 saw significantly fewer participants, the prospects for 2016 are far better and indeed, heading for over-subscription.

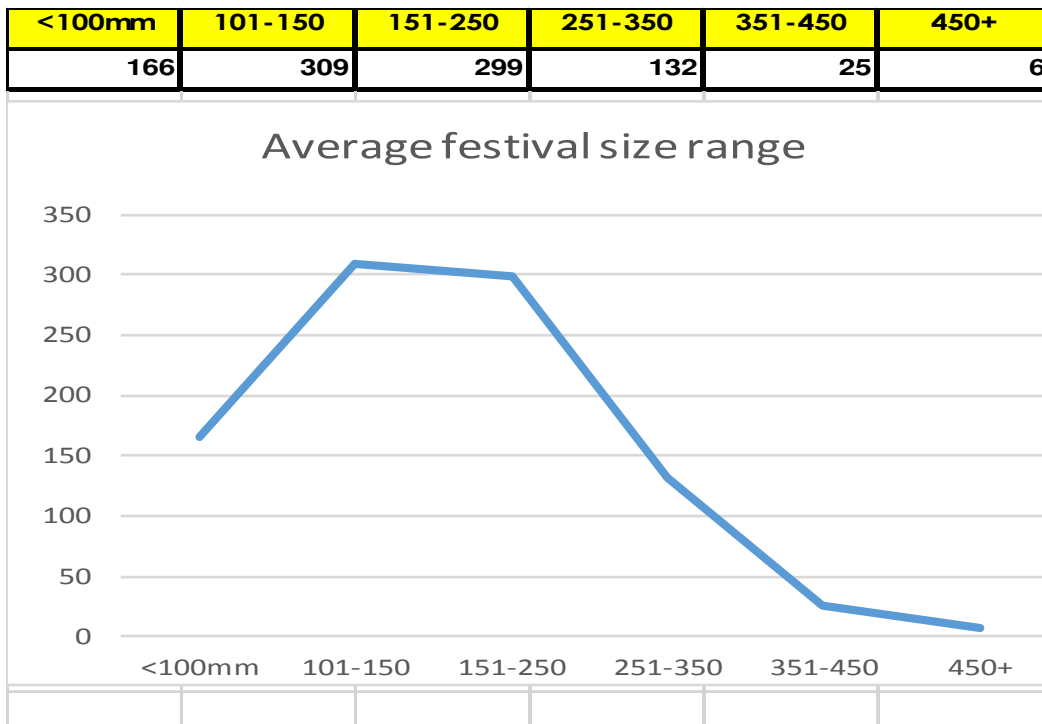


Table 1.

Wild Trout Fly Fishing Festival catch records										
Year	<100mm	101-150	151-250	251-350	351-450	450+	Total	Anglers	Fish/ angle	CPUE
2001	209	224	469	225	23	2	1152	36	32	1.33
2002	227	418	459	186	19	5	1314	40	33	1.37
2003	128	236	123	91	51	4	633	39	16	0.66
2004	207	574	479	43	11	1	1315	43	31	1.37
2005	64	190	230	74	6	3	567	43	13	0.59
2006	132	254	136	63	37	15	637	45	14	0.66
2007	108	291	389	259	57	30	1134	49	23	0.82
2008	143	297	250	113	27	10	840	57	15	0.61
2009	186	216	152	71	5	6	636	35	18	0.76
2010	175	275	264	132	32	6	884	25	35	1.47
2011	26	67	55	14	6	4	172	23	7	0.31
2012	214	308	357	243	34	0	1156	36	32	1.34
2013	437	623	420	224	22	0	1726	35	49	2.05
2014	72	359	401	110	23	4	969	40	24	1.01
2015	128	174	94	42	7	0	445	25	18	0.74
Ave	166	309	299	132	25	6	938	39	25	1.03
Catch Per Unit Effort (CPUE) Assumption = Each angler fished for 8 hrs/day x 3 days										

As an aside, festival figures are the single most concentrated source of information with regard to the size ranges of fish in our waters. Table 2 and Graph 3 show the average size range from 2001 to 2015 and which, in my non-ichthyological layman’s opinion, seems to me to be a perfectly acceptable range which would indicate that the waters fished are in a good state of health.

Table 2 & Graph 3.



Further perusal of Table 1 reveals the fact that fewer large fish have been taken over the past 5 years compared to the previous 5 years. In my non- piscatorialist opinion, this is more of a reflection on tackle and tactics rather than an absence of large fish i.e. the toothpick era pioneered by Ed Herbst has made its mark! For more on this, see <http://www.tomsutcliffe.co.za/fly-fishing/friend-s-articles/item/963-big-trout-in-barkly-east.html> Nonetheless, this does not shed any light on the dearth of big fish between 2001 and 2005 but for want of a better reason, this could well be put down to less skilled fly fishers who participated in the festivals during that period!

So having said all that, what has the WTA achieved for the riparian member? In monetary terms and as shown in the following table, a total of 12411 day permits have been sold for a total of little over R1 million of which 75% has been disbursed to riparian members over the past 25 years at an average of almost R43 000 per year.

The spin-off for members and the region has been mileage of inestimable value. Coverage dating back to the establishment of the WTA in 1991 by, amongst other luminaries, Peter Brigg, Erwin Bursik, Fred Croney, Paul Curtis, Miles Divett, Ed Herbst, Tony Kietzman, Jan Korrubell, Tim Rolston, Fred Steynberg, Tom Sutcliffe, Bruce Truter and many others has played a significant role in making the region and primarily, its attractions, known. The handful of guest farm and town accommodation venues in the region has grown into a massive offering, many of which have contributed very little to the bigger picture in contrast with the presence of the WTA that has played a low-key but important role since 1991.

Table 3.

Year	Day permits sold	Day permit rate	Sales revenue	Admin rate	Total admin
1991	56	R 20.00	R 1 120	R 6	R 336
1992	104	R 20.00	R 2 080	R 6	R 624
1993	24	R 25.00	R 600	R 6	R 144
1994	22	R 25.00	R 550	R 6	R 132
1995	479	R 30.00	R 14 370	R 10	R 4 790
1996	460	R 40.00	R 18 400	R 16	R 7 360
1997	560	R 50.00	R 28 000	R 10	R 5 600
1998	670	R 50.00	R 33 500	R 10	R 6 700
1999	780	R 60.00	R 46 800	R 10	R 7 800
2000	505	R 60.00	R 30 300	R 10	R 5 050
2001	566	R 60.00	R 33 960	R 10	R 5 660
2002	746	R 60.00	R 44 760	R 10	R 7 460
2003	698	R 60.00	R 41 880	R 10	R 6 980
2004	691	R 60.00	R 41 460	R 10	R 6 910
2005	728	R 70.00	R 50 960	R 20	R 14 560
2006	633	R 100.00	R 63 300	R 30	R 18 990
2007	563	R 100.00	R 56 300	R 30	R 16 890
2008	488	R 100.00	R 48 800	R 30	R 14 640
2009	733	R 125.00	R 91 625	R 30	R 21 990
2010	550	R 125.00	R 68 750	R 30	R 16 500
2011	490	R 150.00	R 73 500	R 40	R 19 600
2012	552	R 150.00	R 82 800	R 40	R 22 080
2013	530	R 150.00	R 79 500	R 40	R 21 200
2014	531	R 150.00	R 79 650	R 40	R 21 240
2015-June	252	R 150.00	R 37 800	R 40	R 10 080
Total	12 411		R 1 070 765		R 263 316
Total disbursements			R 807 449		

As far as accommodation venues are concerned, the hotel era, although already in a decline, was still an accommodation provider in 1991. Guesthouses and guest farms were almost unheard of and there were less than a handful in the Barkly East district. Give or take a few, there are now more than 50 catered or self-catering venues in Barkly East, Rhodes and the surrounding areas of the district. This is a 10-fold increase.

When one considers the economic impact of the WTA, day permit sales are but the tip of the ice-berg. The two tables shown below were prepared to illustrate the spin-off from each day permit sold. The figures are based on actual day permit sales, accommodation rates for both catered and self-catering venues as far as can be ascertained since 1991, estimated duration of stay (that in more recent times has increased) plus estimated spend figures that would include snacks, refreshments and fuel. For the purposes of this exercise, the spend figure has been increased by 10% per year

Although not necessarily 100% accurate, these tables provides an indication of the value of a small sector of the industry. In particular, an illustration of what the WTA has been responsible for creating within the Eastern Cape Highlands. Although fly fishermen often visit without their wives and families, there many who bring their families with them. The implication of this is that the spin-off figures are more than likely to be much higher than indicated.

As shown in the tables below, the total estimated value amounted to almost R18 million between 1991 and 2014. Whether much more or much less than this figure is not the issue. The issue is that with the co-operation of riparian members, the Wild Trout Association has been responsible for attracting thousands of fly fishing visitors who have all made a significant contribution to the local economy and indeed, local economic development.

More importantly, none of this would have occurred had it not been for the riparian member's co-operation and to whom we extend our sincere thanks.

Self-catered accommodation plus daily spend x 70% of annual day permit sales								SUMMARY	Total
Year	Rate	Spend/nt	R/night	Nights	R/visit	D. Permits	Revenue/yr	Self-catered	R 9 587 773
1991	R 40	R 40	R 80	3	R 240	39	R 9 408	Catered	R 7 198 298
1992	R 45	R 44	R 89	3	R 267	73	R 19 438	Day p sales	R 1 070 765
1993	R 50	R 48	R 98	3	R 295	17	R 4 959	Total	R 17 856 836
1994	R 55	R 53	R 108	3	R 325	15	R 5 001		
1995	R 60	R 59	R 119	3	R 356	335	R 119 264	Day permit split: 70%:30%	
1996	R 60	R 64	R 124	3	R 373	322	R 120 190	S-c day perms	8511
1997	R 65	R 71	R 136	3	R 408	392	R 159 774	Cat. Day-perm	3648
1998	R 75	R 78	R 153	3	R 459	469	R 215 199	Total	12159
1999	R 80	R 86	R 166	3	R 497	546	R 271 488		
2000	R 90	R 94	R 184	3	R 553	354	R 195 469		
2001	R 100	R 104	R 204	3	R 611	396	R 242 177		
2002	R 110	R 114	R 224	3	R 672	522	R 351 114		
2003	R 120	R 126	R 246	3	R 737	489	R 359 908		
2004	R 135	R 138	R 273	3	R 819	484	R 396 282		
2005	R 150	R 152	R 302	3	R 906	510	R 461 545		
2006	R 160	R 167	R 327	3	R 981	443	R 434 801		
2007	R 170	R 184	R 354	3	R 1 061	394	R 418 296		
2008	R 175	R 202	R 377	3	R 1 132	342	R 386 533		
2009	R 180	R 222	R 402	3	R 1 207	513	R 619 409		
2010	R 190	R 245	R 435	5	R 2 173	385	R 836 675		
2011	R 200	R 269	R 469	5	R 2 345	343	R 804 506		
2012	R 200	R 296	R 496	5	R 2 480	386	R 958 291		
2013	R 250	R 326	R 576	5	R 2 878	371	R 1 067 758		
2014	R 250	R 358	R 608	5	R 3 041	372	R 1 130 288		
Total						8511	R 9 587 773		

Catered accommodation plus daily spend x 30% of annual day permit sales

Year	Rate	Spend	R/night	Nights	R/visit	D. P ermits	Revenue/yr
1991	R 60	R 60	R 120	3	R 360	17	R 6 048
1992	R 65	R 66	R 131	3	R 393	31	R 12 262
1993	R 70	R 73	R 143	3	R 428	7	R 3 080
1994	R 80	R 80	R 160	3	R 480	7	R 3 165
1995	R 90	R 88	R 178	3	R 534	144	R 76 669
1996	R 95	R 97	R 192	3	R 575	138	R 79 335
1997	R 110	R 106	R 216	3	R 649	168	R 109 012
1998	R 120	R 117	R 237	3	R 711	201	R 142 865
1999	R 130	R 129	R 259	3	R 776	234	R 181 548
2000	R 145	R 141	R 286	3	R 859	152	R 130 204
2001	R 165	R 156	R 321	3	R 962	170	R 163 326
2002	R 180	R 171	R 351	3	R 1 054	224	R 235 787
2003	R 200	R 188	R 388	3	R 1 165	209	R 243 934
2004	R 220	R 207	R 427	3	R 1 281	207	R 265 636
2005	R 250	R 228	R 478	3	R 1 434	218	R 313 087
2006	R 275	R 251	R 526	3	R 1 577	190	R 299 454
2007	R 310	R 276	R 586	3	R 1 757	169	R 296 773
2008	R 345	R 303	R 648	3	R 1 945	146	R 284 719
2009	R 380	R 334	R 714	3	R 2 141	220	R 470 759
2010	R 425	R 367	R 792	5	R 3 960	165	R 653 362
2011	R 475	R 404	R 879	5	R 4 393	147	R 645 808
2012	R 525	R 444	R 969	5	R 4 845	166	R 802 344
2013	R 575	R 488	R 1 063	5	R 5 317	159	R 845 416
2014	R 635	R 537	R 1 172	5	R 5 861	159	R 933 704
Total						3648	R 7 198 298